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# China National Tobacco Corporation's Global Expansion

July 2022

**China National Tobacco Corporation is the largest tobacco company in the world. This brief begins to describe the complicated web of the company's global presence, including its network of partnerships and subsidiaries across the tobacco supply chain.**

## Background

China National Tobacco Corporation (CNTC) is a state-owned monopoly and the world's largest producer of cigarettes. In 2021, CNTC cigarettes represented over 46% of global production; the next-largest producers were British American Tobacco (BAT) with 13% and Philip Morris International (PMI) with 12.6%.<sup>1</sup> Despite only 1% of cigarettes produced in China being sold outside of China, CNTC has been working to expand its global reach since the 1990s by establishing subsidiaries, tobacco farms and retail markets across the world.<sup>2</sup>

Founded in 1982 as the result of the centralization of a number of domestic tobacco companies, CNTC manages hundreds of tobacco producers, suppliers and farming companies both in China and around the world.<sup>2</sup> CNTC is controlled by the State Tobacco Monopoly Administration (STMA), a government entity heavily involved in the setting of tobacco control policy in China and CNTC's strategic decision-making.<sup>2</sup> This arrangement of the regulatory agency over the government-owned tobacco entity creates an inherent conflict between strong tobacco control policy designed to decrease the country's tobacco consumption and business interests which profit from increased tobacco sales.

### Important CNTC Dates

- 1982** ● **CNTC founded**
- 1994** ● **CNTC enters into first agreement with PMI**
- 1999** ● **JTI acquires RJ Reynolds' international business (and its existing CNTC partnerships)**
- 2003** ● **CNTC establishes a China division with JTI**
- 2003** ● **CNTC subsidiary Yunnan Tobacco establishes the first deal with Imperial Brands**
- 2007** ● **JTI acquires Gallagher Group (and its existing CNTC partnerships)**
- 2008** ● **CNTC enters into second agreement with PMI**
- 2013** ● **Belt and Road Initiative launched**
- 2013** ● **CNTC and BAT create CTBAT**
- 2017** ● **CNTC incorporated into Belt and Road Initiative strategy**
- 2017** ● **CNTC subsidiary Yunnan Tobacco establishes the second deal with Imperial Brands**
- 2019** ● **CNTC's Hong Kong-based subsidiary, China Tobacco International Inc., files for IPO.**

CNTC provides tobacco products to 316 million domestic smokers and produces 2.5 trillion cigarettes annually.<sup>1-3</sup> Some of CNTC's biggest subsidiaries are the Hongta Tobacco Group, Hongyun Honghe Group and the Shanghai Tobacco Group. While all of these companies produce cigarettes for the Chinese market under a variety of brands, CNTC also has a number of other subsidiaries that produce cigarettes for sale in other countries.<sup>2</sup> A list of CNTC global subsidiaries can be found in Table 1.

### Going global: CNTC's efforts to expand internationally

CNTC has been expanding to international markets since its formation in the early 1980s, initially through joint ventures with other transnational tobacco companies and later by expanding operations in other countries across the supply chain as part of the Chinese government's Belt and Road Initiative.

#### What is the Belt and Road Initiative?

China's Belt and Road Initiative (BRI), launched in 2013, is the Chinese government's economic and policy plan aimed at repositioning China as an influential economic player on the global stage.<sup>4,5</sup> The BRI focuses on infrastructure development, financial support and special trade relationships, as well as relationship-building through policy dialogue.<sup>4</sup> The initiative is executing activities in more than 125 countries in Asia, Europe and Africa, touching 64% of the world's population but only 30% of global gross domestic product (GDP), demonstrating a focus on low- and middle-income countries.<sup>2,4</sup> CNTC was incorporated into the BRI strategy in 2017, making tobacco production and sales an official strategic tool of national economic and diplomatic influence.<sup>2</sup>

### **Entering new markets through transnationals:**

In 1994, CNTC entered into an agreement with PMI to allow the sale of PMI cigarette brands in China. PMI produced its products in CNTC factories and shared technology, training and human resources knowledge with CNTC.<sup>6</sup> A second agreement with PMI in 2008 facilitated the entry of Chinese national brands to markets in Europe and Latin America.<sup>2</sup>

In 2003, Japan Tobacco International (JTI) and CNTC established a China division to facilitate the companies' work together.<sup>2</sup> JTI had inherited previous partnerships with CNTC when they acquired RJ Reynolds' international business in 1999 and Gallagher Group in 2007.<sup>7</sup> These partnerships focused on bringing JTI products into the Chinese market.<sup>7</sup> Additionally, they allowed CNTC to expand the market of its subsidiary, the Shanghai Tobacco Company, into Japan using JTI's distribution network.<sup>6</sup>

In 2013, CNTC and BAT created CTBAT, a Hong Kong headquartered venture, which aims to expand the markets of both companies.<sup>8</sup> BAT had previously worked with CNTC in 1996 and 1999 to produce BAT cigarettes for the Chinese market.<sup>7</sup>

CNTC established two deals, one in 2003 and another in 2017, between CNTC subsidiary Yunnan Tobacco and Imperial Brands.<sup>2</sup> These agreements enabled CNTC to expand farming, manufacturing and sales operations into at least 16 other countries across the world.<sup>2</sup> The deal also allows Imperial to sell its products in the Chinese market.<sup>9</sup>

As part of the larger Chinese government's Belt and Road Initiative, CNTC has continued to expand its influence across the global market by establishing joint ventures to aid its growth and build its customer base.<sup>9</sup>

### **Launching an international hub in Hong Kong:**

Continuing its international expansion, CNTC filed for a Hong Kong initial public offering (IPO) to raise over US \$100 million in 2019 for China Tobacco International Inc. (CTI), one of its overseas companies.<sup>10</sup> CTI Hong Kong was initially established in 2004 but was re-organized in 2018.<sup>11</sup> Following this change, CTI Hong Kong was

tasked with four main responsibilities: 1) tobacco leaf export in collaboration with CTI Brazil, CTI Argentina and CTI North America (discussed in further detail below); 2) tobacco leaf export in South-East Asia; 3) export of manufactured cigarettes to South-East Asia; and 4) sale of novel products.<sup>11</sup> CTI plans to use the funds raised in the IPO for investments and acquisitions, cooperation with other transnational tobacco companies and to explore emerging tobacco markets, including the development and export of heated tobacco products and e-cigarettes.<sup>12</sup>

### **Establishing a presence across the global supply chain:**

In addition to expanding through joint ventures, CNTC has increased its international presence by setting up subsidiary companies to gain access to different parts of the global tobacco supply chain. In doing so, the company often works closely with governments to procure favorable conditions for establishing different companies.<sup>13</sup>

### **Tobacco growing and leaf supply:**

CNTC relies on a network of international farming subsidiaries to support the production of tobacco products for both the domestic market and international distribution. According to the United Nations' Comtrade database, China exported over US \$421 million of unmanufactured tobacco (tobacco leaf) and US \$257 million in cigarettes in 2020.<sup>14</sup> China also imports nearly 100 million kilograms (kgs) of unmanufactured tobacco annually.<sup>15</sup> In 2020, Argentina, Brazil, Kazakhstan, Malawi, Zimbabwe and Zambia each exported over 1 million kgs of tobacco leaf to China.<sup>15</sup> Zimbabwe alone exported over 60 million kgs in that year.<sup>15</sup> Combined, Argentina and Brazil exported over US \$70 million worth of tobacco leaf in 2020.<sup>15</sup> In Zambia, China is the country's largest international purchaser of tobacco, with 10% of their exports going to China.<sup>16</sup> Some of CNTC's tobacco growing operations are described below.

CNTC has extensive operations in Argentina, where the company's subsidiary, China Tobacco International Argentina S.A. (CTIA) is located.<sup>11</sup> CTIA, established in 2009 following nearly a decade of negotiations

with government officials, is mainly a tobacco farming company. Government negotiations included several trips between Argentina and China by officials following initial outreach by the Chinese Embassy in Argentina.<sup>17</sup> CTIA is partially owned by Hongta Tobacco Latinoamerica S.A., a subsidiary of Hongta Tobacco Group (a CNTC subsidiary).<sup>18,19</sup> Argentina mainly exports tobacco leaf to China Tobacco International Europe Company (CTIEC), a CNTC subsidiary established in Romania. CTIA also works with local companies to produce tobacco products in Argentina.<sup>20-22</sup>

In Brazil, China Tabaco Internacional Do Brasil Ltda. (CTIB) is a wholly-owned CNTC subsidiary that exports tobacco leaves to China.<sup>21</sup> Prior to its formation in 2002, China had been importing Brazilian tobacco for half a decade.<sup>23</sup> In 2014, CTIB and Alliance One Brasil Exportadora de Tabacos (AOB) formed a joint venture called China Brasil Tabacos Exportadora SA (CBT).<sup>23</sup> However, it was found that CBT had actually been operating since 2011 and already had 9,500 farmers contracted when it was officially formed in 2014.<sup>23</sup> Alliance One is a global leaf growing and procurement company headquartered in the United States.<sup>24</sup> CBT is currently owned 51% by CTIB and 49% by AOB. Through the agreement, AOB processes the tobacco, and CTIB is responsible for logistics and exports, including to CTIEC in Europe.<sup>25</sup>

In the United States, a CNTC subsidiary, CTI North America, Inc., established a leaf-buying operation in North Carolina in 2013.<sup>26,27</sup> The company purchases leaf from both individual farmers and leaf dealers for further processing and production by China Tobacco International in Hong Kong.<sup>26</sup>

CNTC subsidiaries are also engaged in farming in Africa. In Namibia, the Namibia Oriental Tobacco Corporation coordinates growing operations throughout the country for CNTC.<sup>28</sup> In Zambia, Golden Eagle Tobacco (International) Corporation Ltd., a wholly-owned subsidiary of CNTC, cultivates and processes tobacco leaf and produces cigarettes.<sup>29</sup> In 2020, the same year that Golden Eagle was incorporated, Zambia produced 30 million kg of green leaf tobacco for the year.<sup>29,30</sup> Similar activities are ongoing in Zimbabwe, where Tian Ze Tobacco Ltd. is responsible for nearly half of the

country's leaf exports.<sup>13</sup> In 2008, a memorandum of understanding (MOU) was signed between China and Malawi, in which China agreed to purchase tobacco leaf from Malawi in exchange for the ability to establish a cigarette manufacturing plant in the country.<sup>31</sup> Since 2008, several supply and pricing issues have arisen between the Tobacco Association of Malawi, Malawi tobacco farmers and China.<sup>31</sup> Additionally, two new cigarette manufacturing companies have been established in Malawi, however they are owned by Chinese businesspeople and their link to CNTC is unclear.<sup>31</sup> (See "Targeting Africa.")

### **Tobacco product manufacturing, distribution and sales:**

As part of its global expansion efforts, CNTC has established subsidiaries responsible for cigarette production in Southeast Asia, Latin America and Europe.

- In Cambodia, CNTC subsidiary Guangdong Industrial Co., Ltd. owns the Viniton Group Co., Ltd., which produces Angkor cigarettes.<sup>32</sup> These cigarettes are produced in-country for domestic consumption.<sup>32</sup> CNTC subsidiary, Winnipeg Group Ltd. Wen Ni Dun Inc., also operates in Cambodia and produces cigarettes for domestic consumption.<sup>33</sup> In 2016, Winnipeg Group Ltd. produced nearly 6 billion cigarettes and had an income of US \$70 million.<sup>33</sup>
- In Myanmar, CNTC subsidiary Hongyun Honghe Group owns and operates the Guogan Cigarette Factory through its subsidiary Qujing Cigarette Factory, which manufactures products for domestic consumption.<sup>32</sup> Hongyun Honghe Group produces several brands including Honghe, Yunyan and Lesser Panda.<sup>7</sup> Globally, Hongyun Honghe Group sold over 4.6 million cases of cigarettes in 2021.<sup>28</sup>
- In Argentina, CTIA is closely associated with Espert S.A., which produces low-priced tobacco products for sale in the domestic market.<sup>22</sup>
- A major subsidiary of CNTC is China Tobacco International Europe Company (CTIEC), which operates out of Romania and serves as CNTC's presence in Europe.<sup>34</sup> CTIEC operations, bolstered by a US \$40 million investment by the Chinese government, target markets across Eastern Europe, Southeast Asia, the Middle East and Africa.<sup>20,35</sup>

### CNTC Global Brands

This table provides an overview of some of CNTC's global brands and their main markets. This table is meant to demonstrate the global reach of CNTC products and is not comprehensive.

Brand	Main Market
555 <sup>36</sup>	Bangladesh, India, Indonesia, Pakistan, Thailand, Vietnam
Angkor <sup>7</sup>	Cambodia
Ashima <sup>7,33</sup>	Europe
Brass <sup>7,33</sup>	Europe
Chunghwa <sup>37</sup>	Austria, Denmark, Myanmar, Namibia, Paraguay, Singapore, Turkey, Yemen
Derby <sup>7,33</sup>	Europe
Double Horses <sup>7,33</sup>	Europe
Dubao <sup>7,33</sup>	Europe
Dubliss <sup>7,33</sup>	Europe, Mongolia
Golden Deer <sup>37</sup>	Austria, Denmark, Myanmar, Namibia, Panama, Paraguay, Peru, Singapore, Turkey, Yemen
Golden Monkey <sup>7,33</sup>	Europe
Harmony <sup>38</sup>	Brazil
Honghe <sup>7</sup>	Myanmar
Hongying <sup>33</sup>	Mongolia
Lesser Panda <sup>7</sup>	Myanmar
Marble <sup>7,33</sup>	Europe
Red Double Happiness <sup>37</sup>	Argentina, Austria, Chile, Denmark, Mexico, Mongolia, Myanmar, Namibia, Paraguay, Singapore, Turkey, Yemen
Red Eagle <sup>33</sup>	Mongolia
RGD (Red Golden Dragon) <sup>7</sup>	Czech Republic, Hungary, Poland, Slovakia
Shuangxi <sup>39</sup>	Bangladesh, Pakistan
Totem <sup>33</sup>	Mongolia
Yunyan <sup>7</sup>	Myanmar
Zhongnanhai <sup>37</sup>	Austria, Denmark, Myanmar, Namibia, Paraguay, Singapore, Turkey, Yemen



Figure 1: A pack of Ashima cigarettes (Turkey).<sup>36</sup>



Figure 2: A pack of Dubliss cigarettes (Ukraine).<sup>36</sup>

Some examples of CNTC subsidiaries responsible for the global distribution and sale of Chinese tobacco products include the following:

- CTI, Inc., (Hong Kong) is an overseas subsidiary of CNTC focused on coordinating exports and leaf procurement. It also operates in emerging markets, including novel products and e-cigarettes.<sup>10,12</sup>
- Hongta Group, a CNTC subsidiary, owns a controlling stake in Lao-China Hongta Good Luck Tobacco Company (Lao PDR) which distributes products in Lao PDR.<sup>32,40</sup>
- Mongolian Tobacco Co., Ltd. (Mongolia) is a CNTC subsidiary targeting the Mongolian market for both production of cigarettes and sale of finished products.<sup>33</sup>
- China Tobacco International North America, Inc. (North America) is an indirectly wholly-owned subsidiary of CNTC and a supplier for China Tobacco International.<sup>11</sup>
- Dubai Rui Shi Da Ltd. (United Arab Emirates) is a wholly-owned subsidiary of Tian Li International Company Ltd., a CNTC subsidiary.<sup>33</sup>

### **Alleged involvement in illicit trade**

Globally, CNTC has been accused of engaging in illicit trade activities such as smuggling and counterfeiting.<sup>2</sup> Illicit trade allows the industry to enter new markets that may be inaccessible due to regulatory or trade barriers.<sup>41</sup> This creates brand awareness at low or no cost to the company among a new customer base and can help build distribution networks.<sup>41</sup> Illicit products can also drive more consumption because the products are not taxed and, therefore, are cheaper for consumers.<sup>41</sup>

- CTIEC has exported cigarettes from its manufacturing base in Romania into several European countries, including Ukraine, as far back as 2013.<sup>42</sup> Illicit CNTC products seized in other European countries have been found to have originated in Ukraine from CTIEC-supplied companies.<sup>42</sup>
- CTIEC-produced cigarettes were sold to an Iraqi company, Devmak, before being allegedly smuggled into Italy with the knowledge and approval of CTIEC.<sup>43</sup> The smugglers were found to have links to organized crime and are also suspected of being active in Moldova and Montenegro.<sup>43</sup>

- Smuggling networks have also been uncovered in Latin America, with several China Tobacco-connected, Panama-based companies coordinating shipments of illicit products to several countries in the region.<sup>44</sup> In Ecuador, Chinese embassy officials were found to be receiving smuggled cigarettes.<sup>44</sup> While some of these activities can be attributed to insufficient regulations or enforcement, CNTC also operates within a complicated network of subsidiaries, shipping companies and manufacturers, making it difficult to track the true source of illicit products.<sup>44</sup>

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## Targeting Africa

As part of the BRI, China works to strengthen its relationship with various countries in Africa. Trade between China and Africa has been growing by around 30% each year, and meetings have been held with several governments, including South Africa, Uganda, Nigeria and Egypt about investment opportunities.<sup>45</sup>

These trade relationships have impacted tobacco-related policy, where China is leveraging its government connections to gain a foothold on the continent. In Namibia, the Namibia Oriental Tobacco Corporation, a subsidiary of CNTC, began discussions with government officials in 2013 to lease land in the northern region of Zambezi to the company to grow tobacco leaf for China.<sup>28,46,47</sup> While talks stalled in early 2021 due to a disagreement over the length of the lease, the negotiations demonstrate the close relationship between CNTC and the Namibian government.<sup>46</sup>

A similar relationship with government officials exists in Zambia, where China has paired tobacco expansion with heavy investing in infrastructure projects, especially transportation-related development.<sup>29</sup> This connection emphasizes the link China is drawing between tobacco investments and its global BRI program. In 2021, The Zambian Development Agency (ZDA) signed an Investment Promotion and Protection Agreement with Golden Eagle Tobacco (International) Corporation Limited.<sup>29</sup> Golden Eagle has committed to invest US \$45 million in a range of Zambian infrastructure projects.<sup>29</sup>

Subsidiaries of CNTC also operate in the Democratic Republic of the Congo and Zimbabwe, however, limited information on operations in these countries is publicly available.<sup>13,28</sup> In the Democratic Republic of the Congo, CNTC has collaborated with PMI to open an office focused on promoting and selling its brands in-country.<sup>28</sup>

In Zimbabwe, CNTC operates under Tian Ze Tobacco Ltd., a wholly-owned subsidiary of CNTC-owned Tian Li International Company Ltd.<sup>13</sup> Tian Ze Tobacco is mainly involved in leaf procurement, contract farming, processing, packaging and export; It is responsible for 42% of Zimbabwe's tobacco leaf exports.<sup>13</sup> There have been reports of alleged child labor and farmers' rights violations by Tian Ze Tobacco, with growers stuck in a cycle of company-owned debt, forcing them to put their own families to work.<sup>48,49</sup> The economic pressures of paying back company loans have affected childhood education and health among tobacco growers in Zimbabwe.<sup>48,49</sup>

Tobacco industry so-called corporate social responsibility (CSR) is one way that the industry establishes favorable relationships with governments—a tactic that CNTC uses regularly in China.<sup>50,51</sup> For CNTC, CSR activities likely facilitate CNTC's expansion into new markets and undermine tobacco control policy efforts.<sup>13</sup> In Zimbabwe, Tian Ze Tobacco Co. built an elementary school in the farming community it has established.<sup>51</sup> While locals call the school the Dunnolly Primary School, Chinese officials refer to it as the Tobacco Ma Bo Hope Primary School.<sup>51</sup> While it has not built a school, CNTC's Cambodian subsidiary Viniton Group has supported various schools around its domestic production centers with supplies and furniture.<sup>51</sup>

## Conclusion

While CNTC is the largest tobacco company in the world, relatively little is known about its global operations or influence outside of China compared to other transnational tobacco companies. This brief begins to shed some light on just how extensive and complicated CNTC's global presence is and demonstrates how the company has established a network of partnerships and subsidiaries across the supply chain to advance its global ambitions.

Being a state-owned and operated entity often means that CNTC is perceived as having the weight and respect of the Chinese government behind it as it negotiates entry into new markets and expands its global footprint. Yet, CNTC and its international subsidiaries fundamentally are still tobacco companies which profit from manufacturing and selling a product that kills 8 million people a year.

Therefore, it is essential that stakeholders working to advance tobacco control take notice of CNTC's efforts to expand globally and mitigate the potential impact the company's presence could have on promoting national tobacco control policies.

Governments around the world have committed to implementing a global treaty, the World Health Organization Framework Convention on Tobacco Control, which provides specific guidance under Article 5.3 on how to prevent tobacco industry influence over policy. CNTC should be treated as any other transnational tobacco company that seeks to shore up profits by targeting users in new markets and undermining evidence-based tobacco control policies designed to reduce consumption.

## Additional Information

Further information about the structure, scope and activities of China National Tobacco Corporation are available on [Tobacco Tactics](#) and in a series of [articles](#) by the Organized Crime and Corruption Reporting Project (OCCRP).

## Acknowledgements and Authorship

This brief was prepared by Morgan Zeiss, Lindsay White, Ellie Bartlett and Emma Green of The International Union Against Tuberculosis and Lung Disease (The Union) in partnership with STOP, a global tobacco industry watchdog. We would also like to acknowledge the original research conducted by the African Tobacco Control Alliance (ATCA) and FIC Argentina that led to the creation of this brief.



**Table 1: CNTC Global Subsidiaries 1989-2020\***

This table provides an overview of some of CNTC's global subsidiaries established between 1989 and 2020. Where available, the main activity and location or target market of the subsidiary is also listed. This table is not a comprehensive list of CNTC subsidiaries. Information in this table is drawn from Fang (2016) and other sources cited in this brief.

<b>Company name</b>	<b>Location/Target Market</b>	<b>Main Activity</b>
China Brasil Tabacos Exportadora S.A. (Alliance One joint venture)	Brazil	Leaf procurement
China Tabaco Internacional do Brasil	Brazil	Leaf procurement
China Tobacco Argentina Ltd	Argentina	Production
China Tobacco Hongyun Honghe (PTY) Ltd	Namibia (Walvis Bay)	Production
China Tobacco International Co Ltd	Hong Kong	Production, distribution
China Tobacco International Europe Company (CTIEC)	Romania	Production, distribution
China Tobacco International Hamburg Ltd	Germany	Machinery and accessory materials
China Tobacco International Moscow Office	Russia	
China Tobacco International North America Co Ltd	USA	Leaf procurement
China Tobacco Japan	Japan	Production, distribution
China-Brasil Tabacos Exportadora	Brazil	Leaf procurement
CTBAT	Hong Kong	Production, distribution
CTPMI	Switzerland	Production, distribution
CTPMI D.R.Congo	D.R. Congo	Distribution
Dubai Ruishida Trading Co	UAE	
Golden Eagle Tobacco International Co Ltd	Zambia	Leaf procurement
Golden Leaf Macau Group	Macau	Leaf procurement
Guangdong Industrial Co Ltd	Global	Production, distribution
Hongta Hong Kong International	Hong Kong	
Hongta Tabaco Latinoamericana S.A.	Argentina	Production, distribution
Hongyun Honghe Group	Global	Production, distribution
HTS Hongta Services	Romania	
HTS Hongta Switzerland	Switzerland	
Lao Liaozhong Hongta Fortune Tobacco	Lao PDR	
Mongolia Tobacco Co Ltd	Mongolia	
Myanmar Kokang Factory	Myanmar	
Namibia Oriental Tobacco	Namibia	Leaf procurement
Overseas United Inc	Panama	
PT Kolang Citra Abadi	Indonesia	
Pyongyang Haikusan Co Ltd	North Korea	
Raison Co Ltd	North Korea	
Shandong Tobacco (Middle East) Trading Co	UAE	
Taedong River Co Ltd	North Korea	

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<b>Company name</b>	<b>Location/Target Market</b>	<b>Main Activity</b>
Tian Ze Tobacco Company	Zimbabwe	Leaf procurement
Tian Li International Trading Co Ltd	Hong Kong	
United Castle America SA de CV	Mexico	
United Castle International Co Ltd	Hong Kong	
Universal Tobacco (Dubai)	UAE	
US China Tobacco International	USA	Leaf procurement
Viniton Group	Cambodia	Production, distribution
Winnipeg Group Ltd. Wen Ni Dun Inc	Cambodia	Cambodia
Zhejiang Industrial Co Ltd	Global	Production, distribution

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### About STOP (Stopping Tobacco Organizations and Products)

STOP is a global tobacco industry watchdog whose mission is to expose the tobacco industry strategies and tactics that undermine public health. STOP is funded by Bloomberg Philanthropies and comprised of a partnership among the Tobacco Control Research Group (TCRG) at the University of Bath, The Global Center for Good Governance in Tobacco Control (GGTC), the International Union Against Tuberculosis and Lung Disease (The Union) and Vital Strategies. For more information, visit [exposetobacco.org](http://exposetobacco.org).