

Pack Innovation and Product Designs in ASEAN Countries

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10th Asia Pacific Conference on Tobacco or Health, 18-21 August, 2013

Outline of Presentation

- Introduction
- Method
- Trend in Pack Innovations
- Trend in Product Designs
- Conclusion

“Innovation in cigarettes is a vital element in maintaining consumer perceptions of international brands, whilst boosting value sales in the face of falling volumes and increasing the share of premium brands.”

Source: Euromonitor (June 2012). *New Product Development In Cigarettes: Innovate Or Fail – Keeping Price In Power.*

Why Innovate?

- Packaging innovation is the most immediate way of adding value to a brand and attracting smokers
- Product innovation to cater for selected market segments – young and females
- To circumvent tobacco control law

Method

- Evidence from SEATCA tobacco industry surveillance (SIS)
- Established in 2006
- Conducted in seven ASEAN countries
- Monitor, Alert and Counter (MAC) approach including using a web-based reporting system to compile and record up-to-date information on tobacco industry activities in each country
- Data from 2010 to current

Leading Cigarette Innovations

- **Flavoured cigarettes**
- **New filter technology (Capsule filters)**
- **Pack size**
- **Superslims**

Trends in Pack Design

- Use of new **descriptors** to communicate deceptive differences in the risk of different brands
- **Colour coding** - used to depict strengths of product designs, to replace descriptors and flavour differences in cigarettes
- **New packaging** designs to promote products and brand identity

Flavoured Cigarettes

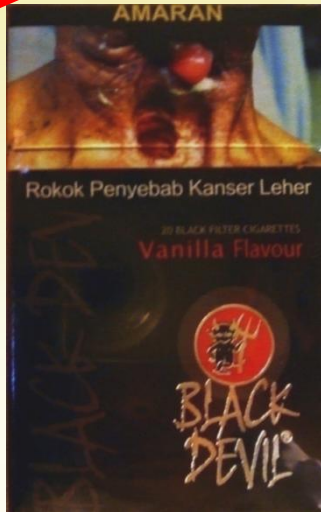
Cambodia



- Targeting youth and female
- Colours are used to depict different flavours

Malaysia

Fruit Flavoured Cigarettes



Vanila



Strawberry



Green Apple



Orange

Philippines



Sunny Peach

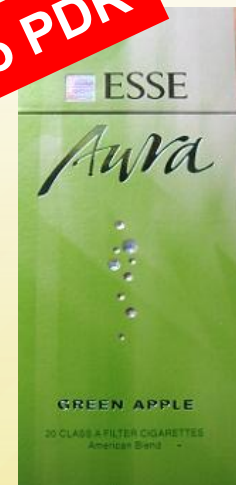


Sweet Melon



Menthol Orange

Lao PDR



Green Apple

Indonesia



Philippines



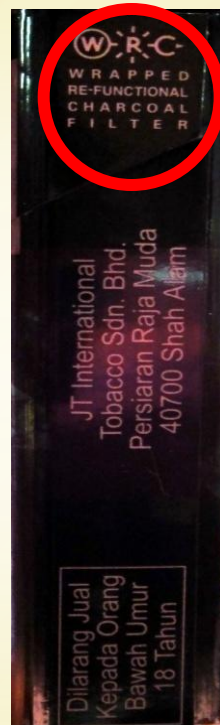
Confectionery
Flavoured
Cigarettes

New Filter Design Technology

Malaysia



WRC-Wrapped Re-Functional Charcoal Filter Technology



Triple Filter Charcoal Technology

2010

Cambodia

2012



Quality of charcoal filter



Insert

2010

Malaysia



**Mintek
Charged Filter
Technology**

Menthol Capsule Filter

Malaysia

2011

Indonesia



A special icon has been developed to be printed on the pack to visually associate the unique product features with the new cigarette



The new Dunhill Switch give the choice between a normal flavored smoke and menthol in one cigarette

Malaysia

Mint Capsule Filter

2011



Release Mint
by crushing the
capsule

2012



Crush the capsule to
experience extreme
freshness



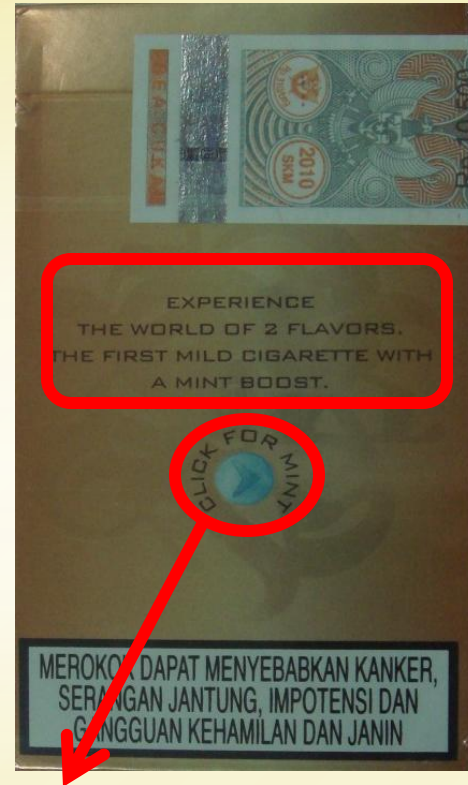
For an extreme
menthol sensation



Sampoerna Flava offers 2-in-1 taste products - Mint Cigarettes

Indonesia

2011



When smokers click the filter (a mint ball) to release the flavor from the capsule while smoking, they can indulge in a second taste

Superslims and 'Purse packs' Targeting Women

Indonesia



**A volution
kretek
Slims**



**A volution
Menthol
Slims**

Malaysia



Lao PDR



Slim/Super Slim Cigarettes Designed for Women

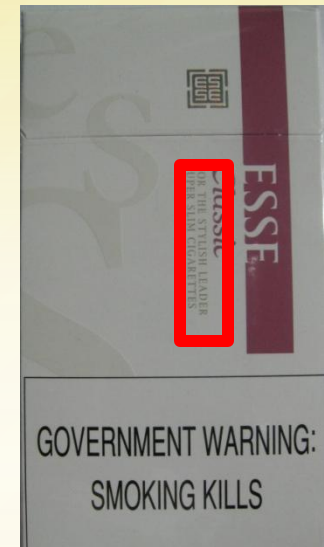
Indonesia



Thailand



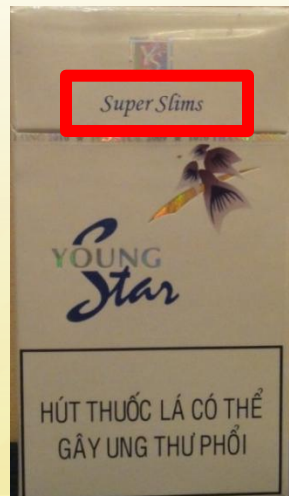
Philippines



Cambodia



Vietnam



- Elegant slims influence beliefs about smoking and weight control

- Colours intended for smokers to coordinate with outfits/mood

Kiddy Packs Design

Cambodia



Ten clove cigarettes



ARA-12 Sticks:
BAT introduced
kiddy packs to
target teenagers

Indonesia



Clas Mild low
tar and slim
packaging

Philippines



Vietnam



Kiddie pack in the
form of sachet
packaging

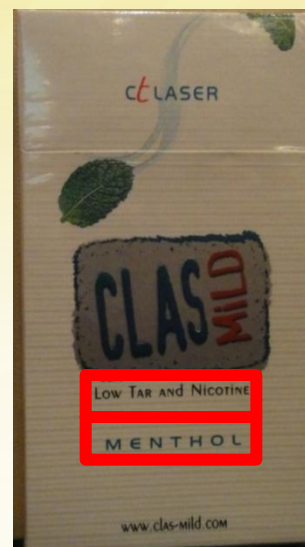
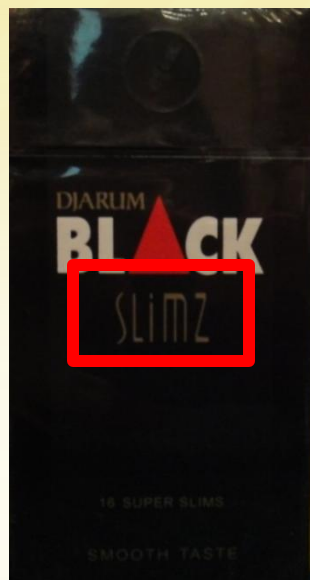
Use of New Descriptors/Terms on Packs

Word or descriptor used to promote different product design such as “light”, “ultra light”, “mild”, “cool”, “extra”, “low tar”, “special”, “full flavour”, “premium”, “rich”, “famous”, “slim”

- Communicate strength**
- Convey the impression of lower tar or milder cigarettes**
- Suggest superiority or variations in quality of the product**

Product Variants Using Descriptors

Indonesia



Cambodia

Vietnam



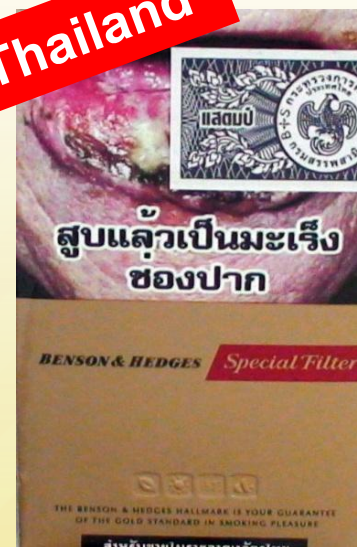
Lao PDR



Philippines



Thailand



Malaysia



- With descriptor ban in 2009, colours were used to replace descriptors such as blue (Light), red (Regular) and green (Menthol)
- Colour coding has been used to sensitize smokers to different product designs prior to descriptor ban

Sensitize Consumers to the Types of Product Design Using Colours

Vietnam



Different colour coding to differentiate product designs such as **red** colour for regular cigarette, **blue** for light cigarette and **green** for menthol cigarette

Cambodia



Attractive Pack Designs Targeting Youth

Indonesia

2010

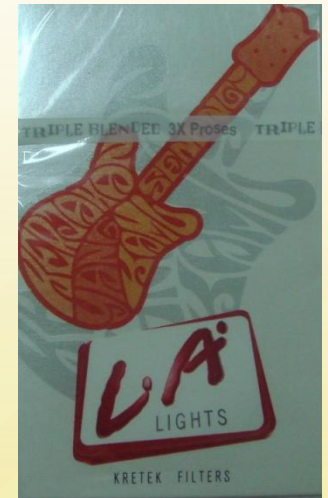
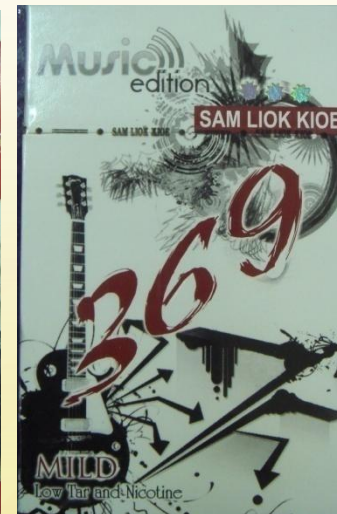


Cambodia

2011



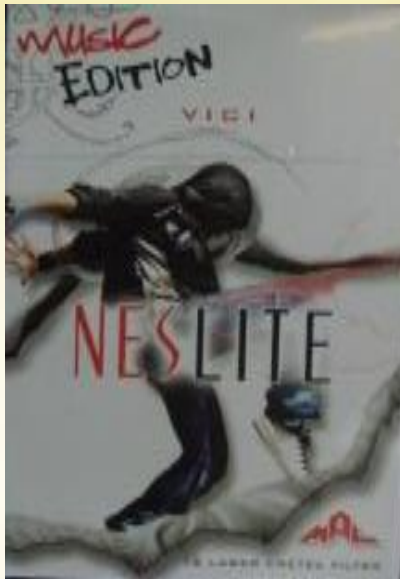
2011



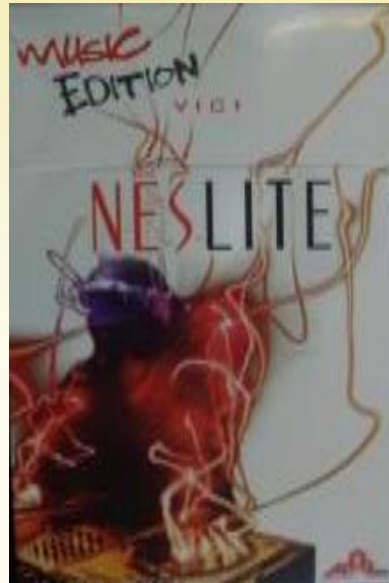
Indonesia

2011

Targeting Youth



**Neslite
Music
Edition:
Version 1
(Dancer)**



**Neslite Music
Edition:
Version 2
(Disk Jockey
(DJ))**



**Neslite Music
Edition:
Version 3
(musical note)**

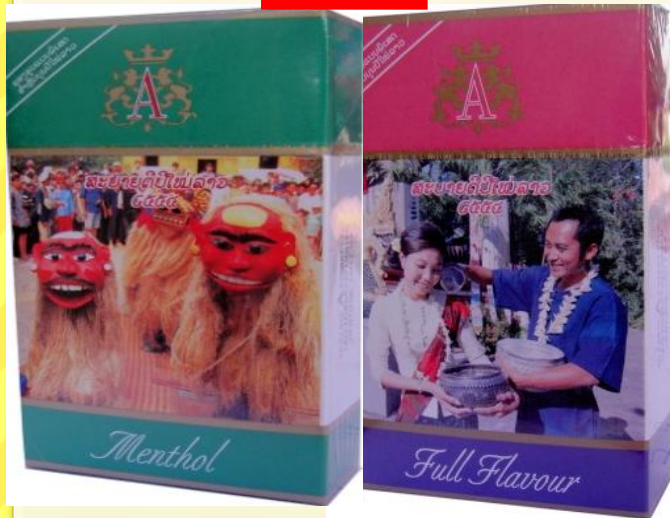


**Marlboro
Limited
Edition**

Novelty Packaging Design

Limited editions coinciding with various events

Laos



Lao New Year in
April 2011

Indonesia



2010 FIFA World Cup

F-1

Innovative packaging designs help to
promote products and brand identity

New Packaging Design

Special Edition

Cambodia

2012



The Top of DOUBLE HAPPINESS

"New International Look,
Same Great Taste"



New blue
pack design
with new
style of eagle
image



New
Davidoff
Superslims

Indonesia

New Packaging Design

2011

New Kretek Product Design



← **Sejati Gold:** kretek" version for Bentoel Sejati brand



← **Apache Kretek:** kretek version for Apache brand

Special promotion

A Mild Limited Time Only Regular and Menthol →

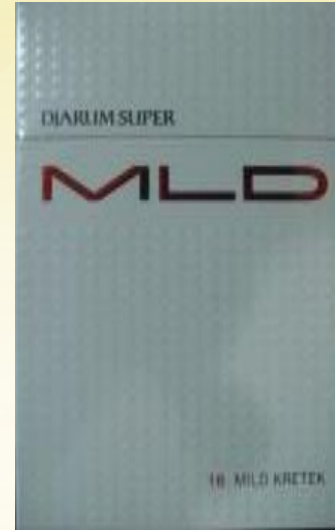


Djarum Black Menthol New Look →



Indonesia

New Cigarette Brands and Product Designs (2011)



**Djarum
Super Mild:
New Mild
version from
Djarum**

**Tambora:
New
product
from PT
Tambora
Mulyorejo
, Malang**

Halim Filter

Esse Golden Leaf

New Cigarette Brands and Product Designs (2012)

Indonesia



Lao PDR



Exploiting the loopholes in the Control of Tobacco Product (Amendment) Regulations 2008

Malaysia

No specification of size of the pack, thus allowing the tobacco industry to introduce cigarette packs in the shape of small 'lipstick' boxes

Lipstick pack

Tax stamp concealing pictorial health warning



Distortion of the picture warning as the cigarette packaging is smaller in size

Conclusion

- Tobacco industry exploits existing tobacco control legislation across the ASEAN region
- Countries are encouraged to adopt plain packaging that requires a standardized packaging removing all product advertising including colours, logos, brand imagery to effectively counter industry's creative pack designs

Acknowledgements

SIS country focal points:

Cambodia: Dr Mom Kong & Ms Phallin Yeou, Cambodia Movement for Health (CMH)SITT Cambodia

Indonesia: Ms Indah, PermataNCCP

Lao PDR: Ms Vathsana Kongsengphengphet, Dr Maniphanh Vongphosy, & Mr Bounhap, SITT Lao

Philippines Atty. Irene Patricia Reyes & Dr Rachel Rowena Garcia, Health Justice

Thailand: Dr Piyarat Nimpitakpong, Faculty of Pharmaceutical Sciences, Naresuan University

Vietnam: Ms Doan Thi Thu Huyen (VINACOSH) & Ms Phuong Ha (Health Bridge)

Dr Mary Assunta, Senior Policy Adviser, SEATCA

Ms Worrawan Jirathanapiwat - SIS project manager, SEATCA

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