

Imperial Tobacco Limited/Limitée



14317

AG-31

Document entitled "The Canadian Tobacco Market at a Glance"

**THE CANADIAN TOBACCO MARKET  
AT A GLANCE**

1989

OMRON & CIGARETTES  
CALENDAR 1971-1989

14318

	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989
1. TOTAL POPULATION (Millions)	21.7	21.8	22.1	22.3	22.5	23.0	23.2	23.5	23.7	24.0	24.2	24.5	24.7	25.1	25.4	25.6	25.9	26.1	26.5
\$ -vs- Previous Year	1.4	0.5	1.4	0.9	0.9	2.2	0.9	1.3	0.9	1.3	0.8	1.2	0.8	1.6	1.2	0.8	1.2	0.8	1.5
2. POPULATION 15 OVER (Millions)	15.3	15.5	15.9	16.3	16.7	17.1	17.4	17.8	18.1	18.4	18.7	18.9	19.2	19.7	19.9	20.1	20.4	20.6	20.7
\$ -vs- Previous Year	2.7	1.3	2.6	2.5	2.5	2.4	1.8	2.3	1.7	1.7	1.6	1.1	1.6	2.6	1.0	1.0	1.5	1.0	0.5
3. INCIDENCE 15 OVER (Claimed)/(Sp. 1989)	46.9	45.6	45.6	44.2	43.9	44.2	43.1	40.0	39.8	40.3	39.4	39.5	38.6	39.6	37.1	34.3	33.5	34.8	32.4
Total	54.6	52.5	51.7	48.6	49.3	49.0	47.6	46.4	44.1	44.1	43.9	41.9	42.6	42.1	38.2	35.6	35.6	35.7	34.1
Male	39.4	38.8	39.0	39.8	39.6	39.2	38.7	38.0	36.0	36.7	36.0	37.1	34.8	37.1	36.0	33.0	31.4	33.9	32.7
Female	20.5	20.7	21.2	23.9	23.8	24.1	21.4	21.5	21.5	21.4	21.8	22.3	22.1	22.0	21.4	21.7	21.2	21.0	32.9
Calculated	21.1	22.0	22.7	23.5	23.5	23.8	24.2	25.5	26.0	24.9	25.8	25.7	25.2	23.7	24.2	24.8	24.2	23.0	23.6
3. ACTUAL QUITTING - TOTAL/(Sp. 1989)	1.4	2.1	1.3	1.7	1.8	1.9	2.1	1.9	1.7	1.7	1.9	1.9	2.3	1.8	1.8	1.7	1.4	1.4	1.8
(Less than 6 months) Male	1.4	2.4	1.7	2.1	1.8	2.4	2.2	2.2	1.8	2.0	2.3	1.9	2.8	2.2	1.8	2.2	1.5	1.4	1.8
Female	1.4	1.8	1.0	1.3	1.8	1.4	2.0	1.5	1.7	1.4	1.4	1.9	1.8	1.5	1.7	1.3	1.4	1.5	1.7
4. STARTING 15 OVER/(YTD Aug. 1989)	n/a	n/a	n/a	n/a	0.5	0.7	0.8	0.8	0.8	0.9	0.9	0.9	0.6	0.6	0.7	0.7	0.7	0.7	0.7
5. SWITCHING RATE (Past Year)/(YTD Aug. 1989)	8.0	10.0	10.0	10.1	10.0	14.1	18.2	18.0	17.1	16.3	13.9	12.3	12.6	10.9	10.8	18.7	13.7	11.7	11.0
6. \$ LEGALLY BUY BY CREDIT/(YTD Aug. 1989)	n/a	n/a	46	46	46	50	51	49	46	47	44	48	49	40	37	38	36	36	31
7. SMOCKING & HEALTH/(YTD Aug. 1989)	48	59	56	63	64	67	71	72	72	74	75	76	76	77	77	79	77	77	79
8. \$ Agree Smoking Is Dangerous for Anyone	n/a	n/a	n/a	n/a	n/a	40	40	42	42	43	43	43	43	41	41	45	43	43	43
9. \$ Attempted to Quit	n/a	23	24	24	25	27	34	36	38	40	45	45	44	42	45	47	47	48	48
10. \$ Intend to Quit	50.9	53.4	54.9	57.2	57.4	59.5	61.5	61.4	63.7	64.3	66.4	66.1	62.7	61.4	58.7	55.3	52.4	50.9	49.1
11. ACTUAL INDUSTRY VOLUME (Bills)/(12-M Aug. 1989)	2.2	4.9	2.8	4.2	0.3	3.7	3.4	-0.2	3.7	0.9	3.3	-0.5	-5.1	-2.1	-4.4	-5.8	-5.2	-2.9	-3.6
\$ -vs- Previous Year																			

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1. ADJUSTED INDUSTRY VOLUME (Blms)

\$ vs- Previous Year

1971	51.2	52.2	55.0	56.7	59.3	59.8	61.1	62.3	63.2	65.2	64.5	66.7	65.9	62.9	60.9	59.0	55.3	52.7	51.1	n/a
	4.0	3.9	3.4	3.1	2.8	2.6	2.2	2.0	1.4	1.4	2.1	3.4	-1.2	-4.6	-3.2	-3.1	-6.3	-4.7	-3.0	

2. SHARE OF MARKET/(12-M Aug.'89)

1. I.T.L. \$  
 \$ vs- Previous Year

	33.5	37.3	37.1	37.9	36.7	38.1	38.9	42.3	46.2	46.8	48.5	49.1	50.2	52.0	52.9	51.5	51.6	51.6	56.3	57.2
	-	-3.1	-0.5	2.2	-3.2	3.8	2.1	8.7	6.9	3.5	3.6	1.2	2.2	3.6	1.7	-2.6	6.0	3.1	1.3	

3. Roth-CEH \$  
 \$ vs- Previous Year

	37.7	39.5	41.5	41.6	42.8	42.6	40.6	31.6	37.4	36.6	31.2	33.3	33.1	31.1	30.5	32.6	33.8	27.0	25.9	-1.6
	-	4.8	5.1	0.2	2.9	-0.5	-4.7	-4.9	-3.1	-4.8	-3.9	-2.6	-0.6	-6.0	-1.9	6.9	-11.7	-6.3		

5. McDonald \$  
 \$ vs- Previous Year

	23.8	23.2	21.4	21.5	20.1	19.3	20.5	19.2	17.4	17.6	17.3	17.6	16.7	16.9	16.6	15.9	16.6	16.6	16.7	16.9
	-	-2.5	-7.8	-4.2	-2.0	-4.0	6.2	-6.3	-9.4	1.1	-1.7	1.7	-5.1	1.2	-1.8	-4.2	4.4	0.6	0.6	0.3

7. \$ FILTERS/(YTD Aug.'89)

8. \$ KING SIZE/(YTD Aug.'89)

81	85	86	89	92	94	95	95	95	95	96	96	97	97	97	98	98	98	98	98	99	99
48	49	50	51	51	52	51	52	51	51	50	48	47	46	46	45	44	46	45	44	44	43

1. \$ FILE CURED

3. \$ WHITE TIPPING

98.9	99.0	99.1	99.2	99.2	99.3	99.3	99.9	98.9	98.8	98.8	99.0	99.1	98.7								
33.9	32.9	32.4	32.4	32.6	33.3	34.4	34.4	34.2	40.8	42.3	39.6	40.5	41.6								

1. \$ VENTILATED

2. # OF BRMS AVAILABLE/(June'89)

n/a	n/a	n/a	n/a	0.7	1.7	2.1	4.2	5.7	19.3	32.8	36.8	41.6									
n/a	n/a	75	n/a	79	94	106	104	113	115	120	120	130	144	146	165	148	154	154			

1. DECLARED S.M.A.T. ACCUMULATED \$

1. # 5-9 TAR/(June'89)

3. # 6-9 TAR

5. # 10-14 TAR

7. # 15-17 TAR

n/a	n/a	17.0	16.9	17.0	16.6	15.8	15.0	14.2	13.7	13.4	12.9	12.7	12.3	n/a	12.2	12.0	-28.2	-29.4			
-	-	-	-	-	-2.4	-7.1	-11.2	-16.4	-19.4	-21.2	-24.1	-25.3	-27.6								

1	1	1	1	1	1	1	9	10	11	16	16	19	19	26	27	27	27	27	27	27	27
2	2	4	4	4	4	5	4	7	10	11	14	15	18	21	20	47	28	31	31	31	31

n/a	n/a	11	11	12	20	31	31	31	37	40	46	46	54	59	62	58	62	63	63	63	63
n/a	n/a	31	n/a	43	50	51	51	51	47	45	40	40	40	35	34	30	29	31	31	31	31

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	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989
3. / OVER 18 TR	n/a	n/a	26	n/a	19	10	11	5	4	-	-	-	-	3	3	2	2	2	2
SHARE OF MARKET BY TRV(12-M Aug. 1989)																			
3. 1-5	0.3	0.3	0.3	0.3	0.7	1.7	4.0	5.1	6.1	6.9	7.3	7.8	8.0	7.9	8.1	8.1	8.2	8.0	7.9
0. 6-9	n/a	n/a	n/a	n/a	n/a	n/a	4.2	4.6	5.1	6.7	8.3	8.8	9.5	10.9	12.9	11.9	12.1	12.7	13.8
1. 10-14	n/a	n/a	n/a	n/a	n/a	n/a	26.7	31.7	34.1	37.5	39.2	41.9	43.2	44.0	44.1	48.7	50.1	50.4	50.4
2. 15-18	n/a	n/a	n/a	n/a	n/a	n/a	64.7	58.3	52.6	48.5	45.0	41.3	39.3	37.2	34.9	31.3	28.6	28.8	27.9
3. OVER 18	n/a	n/a	n/a	n/a	n/a	n/a	-	-	1.8	-	-	-	-	-	-	-	-	0.1	-

4. SHARE OF MARKET BY SEGM(12-M Aug. 1989)

Strong/Pop	30.2	27.1	25.3	23.4	21.1	20.1	18.4	17.3	16.4	15.5	12.2	13.5	13.2	12.9	12.9	12.9	12.9	12.9	12.9
Mild/Pop/Young	12.4	14.9	17.0	19.3	21.9	24.5	26.0	27.2	29.0	29.4	26.6	31.0	31.2	31.8	31.8	31.8	31.8	31.8	31.8
Mild/Unpop/Old	26.2	22.2	19.0	17.3	15.2	13.7	12.7	12.0	11.0	11.9	21.4	13.5	10.9	9.9	9.9	9.9	9.9	9.9	9.9
Mild/Fem/Old	9.7	10.7	12.3	13.0	12.9	12.1	11.7	11.4	11.0	9.9	7.9	8.3	7.6	7.1	7.1	7.1	7.1	7.1	7.1
Mild/Pop/Mod.	-	2.5	2.5	2.8	4.4	5.2	5.7	6.4	7.3	7.6	6.9	9.6	10.9	12.1	12.1	12.1	12.1	12.1	12.1
Mild/Fem/Mod.	-	0.5	1.9	2.5	2.8	2.8	3.0	3.2	3.5	4.5	4.2	4.7	4.8	5.0	5.0	5.0	5.0	5.0	5.0
Very low	1.6	3.2	3.7	4.7	5.3	5.1	5.2	5.3	5.4	5.6	6.2	5.6	5.5	5.5	5.5	5.5	5.5	5.5	5.5
Ultra low	-	0.6	1.0	1.4	1.5	1.5	1.4	1.4	1.4	1.3	1.2	1.2	1.1	1.1	1.1	1.1	1.1	1.1	1.1
Strong Menthol	7.3	6.5	5.8	5.4	4.9	4.5	4.3	4.1	3.8	3.6	3.5	3.2	3.0	2.9	2.9	2.9	2.9	2.9	2.9
Mild Menthol	0.5	1.1	1.5	1.6	1.9	2.0	2.2	2.3	2.3	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.5
Plain	6.2	5.2	4.6	3.9	3.5	3.2	2.8	2.5	2.3	2.0	1.7	1.6	1.4	1.3	1.3	1.3	1.3	1.3	1.3
Other High 13+	4.3	3.2	2.5	2.4	1.9	1.6	1.5	2.0	2.0	1.6	1.4	1.2	1.8	2.0	2.0	2.0	2.0	2.0	2.0
Other Mid 7-12	1.6	2.6	2.7	2.4	2.5	3.0	4.1	3.9	3.9	3.7	4.0	3.4	3.5	3.2	3.2	3.2	3.2	3.2	3.2
Other Low 7	-	-	-	-	-	0.7	1.0	1.1	0.9	0.9	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.7

5. MAJOR BRAND SHARES(12-M Aug. 1989)

1 PLAYER'S LIGHT REGULAR	-	-	-	-	-	1.8	3.2	4.8	6.6	7.6	9.2	10.1	10.6	11.4	11.6	10.9	12.3	12.5	12.8
2 EXOTIC "A" REGULAR	17.3	17.4	16.5	15.9	15.5	15.2	14.3	13.0	11.6	10.3	9.5	8.5	7.9	7.6	7.2	5.5	6.0	6.0	5.8

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	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989
3 JAMURIER REGULAR	3.4	3.7	4.0	4.3	4.6	5.1	5.2	5.8	6.3	6.3	6.3	6.3	6.3	6.5	6.5	5.5	6.2	6.2	6.2
4 PLAYER'S REGULAR	6.4	7.0	8.0	8.7	8.7	8.5	7.5	7.4	7.1	6.5	6.5	6.3	6.0	5.9	5.6	4.9	5.2	4.9	4.8
5 JAMURIER KING SIZE	5.0	5.1	5.4	5.6	5.9	6.2	5.8	5.8	5.7	5.3	5.1	5.2	5.2	5.5	5.4	4.7	5.8	5.9	6.0
6 FOTHANS KING SIZE	12.4	12.8	13.3	13.5	13.8	13.1	11.3	9.3	8.4	7.0	6.3	6.0	5.5	5.2	4.6	4.0	4.3	4.0	3.8
7 PETER JOSSON KING SIZE	5.9	5.1	4.7	4.2	4.0	3.6	2.9	2.5	2.0	1.7	1.5	1.4	1.3	1.2	1.5	3.3	1.2	1.0	0.9
8 PLAYER'S EXTRA LIGHT REGULAR	-	-	-	-	-	-	-	-	-	1.4	1.9	2.2	2.5	2.6	2.7	2.5	2.7	2.8	2.9
9 CRANEN "M" KING SIZE	2.5	2.8	3.2	3.1	3.4	3.8	3.8	3.7	3.6	3.4	3.2	3.2	3.2	3.1	2.7	2.2	2.4	2.2	2.1
10 FOTHANS SPECIAL KING SIZE	-	-	-	-	-	-	0.9	1.8	2.5	2.0	2.7	2.7	2.7	2.6	2.4	2.0	2.1	1.9	1.9
11 WATINEE EXTRA MILD KING SIZE	-	-	-	-	-	-	-	0.9	1.7	2.3	2.4	2.4	2.4	2.4	2.2	1.9	2.1	2.0	2.0
12 NO. 7 LIGHTS REGULAR	-	-	-	-	-	-	-	0.1	0.1	0.3	0.2	0.1	0.1	0.1	0.7	1.9	0.4	0.2	0.2
13 JAMURIER LIGHT REGULAR	-	-	-	-	-	-	-	-	-	0.6	0.9	1.2	1.5	1.7	1.9	1.8	1.8	1.8	1.8
14 PETER JOSSON EXTRA LIGHT K.S.	-	-	-	-	-	-	-	0.3	0.5	0.6	0.5	0.5	0.5	0.5	0.6	1.7	0.7	0.5	0.5
15 JAMURIER SP MILD KING SIZE	-	-	-	-	-	-	-	1.3	1.6	1.8	1.8	1.8	1.9	2.0	2.0	1.6	1.8	1.8	1.8
16 EXPORT "M" LIGHTS REGULAR	-	-	-	-	-	-	1.4	1.6	1.7	1.9	2.0	2.1	2.1	1.8	1.9	1.6	1.8	2.1	2.2
17 CRANEN "M" REGULAR	1.3	1.4	1.7	1.6	1.8	2.0	2.1	2.2	2.3	2.3	2.3	2.3	2.2	2.0	1.8	1.5	1.4	1.2	1.1
18 CRANEN "M" KING SIZE	2.0	2.3	2.6	2.7	2.9	2.9	2.7	2.4	2.3	2.1	2.0	1.9	1.9	1.7	1.6	1.5	1.5	1.4	1.3
19 WATINEE KING SIZE	2.2	2.0	1.9	2.0	2.0	2.5	2.6	2.7	2.7	2.5	2.3	2.1	2.0	1.9	1.8	1.4	1.5	1.4	1.3
20 NO. 7 KING SIZE	3.2	3.2	3.5	3.7	3.9	4.1	3.6	3.1	2.7	2.2	2.0	1.9	1.7	1.6	1.4	1.3	1.4	1.2	1.1
21 PLAYER'S LIGHT KING SIZE	-	-	-	-	-	0.5	0.6	0.6	0.7	0.7	0.8	0.9	1.0	1.2	1.4	1.3	1.8	1.9	2.1
22 EXPORT "M" MEDIUM REGULAR	-	-	-	-	-	-	-	-	-	1.3	1.4	1.3	1.4	1.4	1.4	1.7	1.6	2.0	2.0
23 JAMURIER LIGHT KING SIZE	-	-	-	-	-	-	-	-	-	0.6	0.6	0.8	1.0	1.1	1.3	1.2	1.4	1.5	1.6
24 CAMEO	3.6	3.6	3.4	3.3	3.2	2.8	2.4	2.2	2.0	1.8	1.6	1.5	1.4	1.3	1.2	1.1	1.0	1.0	1.0
25 MAX TEN REGULAR	3.9	3.7	3.8	4.0	3.7	3.5	2.8	2.7	2.6	2.4	2.2	1.9	1.8	1.5	1.4	0.9	1.1	1.1	1.0
26 WATINEE REGULAR	1.5	1.4	1.3	1.3	1.2	1.4	1.5	1.7	1.7	1.7	1.5	1.3	1.2	1.2	1.1	0.9	0.8	0.8	0.7
27 PLAYER'S PLAIN	4.3	4.0	3.7	3.5	3.1	2.4	2.1	1.8	1.6	1.5	1.3	1.2	1.1	1.0	0.9	0.8	0.7	0.7	0.6
28 JAMURIER SPECIAL 100'S	-	-	-	-	-	-	-	0.5	0.6	0.7	0.7	0.7	0.8	0.9	0.8	0.8	1.0	1.0	1.0
29 VANTAGE KING SIZE	-	-	-	-	-	-	1.0	1.1	1.2	1.3	1.3	1.2	1.1	1.1	0.9	0.8	0.8	0.8	0.8
30 BELVEDERE REGULAR	2.4	2.4	2.7	2.6	2.8	2.7	2.2	2.0	1.9	1.8	1.6	1.4	1.4	1.2	1.2	0.8	1.0	1.0	0.9
31 MEDALLION	-	-	-	-	-	-	0.4	0.7	0.9	1.0	0.9	0.9	0.9	0.8	0.8	0.7	0.7	0.7	0.7
32 BELVEDERE EXTRA MILD REGULAR	-	-	-	-	-	-	0.2	0.3	0.4	0.6	0.7	0.8	0.9	0.8	0.8	0.7	0.8	0.9	0.9
33 EXPORT PLAIN	4.0	3.4	2.8	2.5	2.3	2.0	1.7	1.4	1.2	1.1	1.0	0.9	0.8	0.7	0.7	0.6	0.5	0.5	0.4
34 CAMEO EXTRA MILD	-	-	-	-	-	0.6	0.0	0.9	1.0	1.0	0.9	0.8	0.8	0.7	0.7	0.6	0.6	0.5	0.5
35 NO. 7 LIGHTS KING SIZE	-	-	-	-	-	-	-	0.4	0.6	0.7	0.7	0.8	0.8	0.7	0.7	0.6	0.6	0.6	0.6
36 CRANEN "M" SPECIAL KING SIZE	-	-	-	-	-	-	1.4	1.2	0.9	0.9	0.9	0.9	0.9	0.9	0.8	0.6	0.6	0.6	0.5
37 B&H 100 DELUXE ULTRA LIGHT	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.6	0.6	0.8	0.8	0.8
38 EXPORT MILD REGULAR	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.6	0.5	0.5	0.6	0.6
39 504 LIGHTS 100	-	-	-	-	-	-	-	-	-	-	-	0.9	0.7	0.6	0.4	0.4	0.4	0.5	0.5

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	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989
40 B&W 100 F	1.2	1.2	1.0	1.0	0.9	0.9	0.7	0.7	0.6	0.5	0.5	0.5	0.5	0.5	0.5	0.4	0.5	0.5	0.5
41 EXPORT "M" KING SIZE	-	-	-	-	0.8	0.9	0.7	0.6	0.5	0.5	0.5	0.5	0.5	0.4	0.4	0.4	0.4	0.4	0.4
42 SELKON KING SIZE	2.1	2.1	2.1	2.1	2.0	1.9	1.5	1.4	1.3	1.2	1.1	1.0	1.0	0.8	0.8	0.4	0.6	0.6	0.6
43 MARK TEN KING SIZE	-	-	-	-	-	-	-	-	-	0.4	0.5	0.6	0.6	0.6	0.6	0.4	0.5	0.4	0.4
44 RUTHANS EXTRA LIGHT KING SIZE	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.3	0.3	0.2	0.2	0.2
45 AWAINT KING SIZE	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.2	0.3	0.2	0.2	0.2
46 AWAINT LIGHT KING SIZE	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.3	0.3	0.4	0.4	0.4
47 B&W 100 DELUXE HERCUL UL	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.3	0.3	0.3	0.3	0.2
48 ORAVEN "M" SPECIAL KING SIZE	-	-	-	-	-	-	-	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.3	0.3	0.3	0.2	0.2
49 BELVEDERE KING SIZE	1.9	1.9	1.9	1.8	1.9	1.7	1.2	1.0	0.8	0.7	0.6	0.6	0.5	0.4	0.4	0.4	0.4	0.4	0.4
50 VISOUNT #1 KING SIZE	-	-	-	-	-	-	0.2	0.3	0.3	0.2	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3
51 ACCORD KING SIZE	-	-	-	-	-	-	-	-	-	0.3	0.5	0.5	0.4	0.4	0.4	0.3	0.3	0.3	0.2
52 PLAYER'S MEDIUM REGULAR	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.9
53 PLAYER'S MEDIUM KING SIZE	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.9
54 EXPORT A ULTRA LIGHT	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.3

ADVERTISING EXPENDITURES - CIGETS ONLY  
(NYD July 89)

Incorle Tobacco Limited	26.7	26.1	26.5	29.8	26.1	33.2	30.4	31.5	34.1	31.8	27.0	27.7	26.1	27.9	27.2	27.0	30.5	27.6	12.9
Reimanns/Barnes & Hoeges	40.8	47.4	44.7	43.3	47.3	46.7	53.3	51.4	49.3	41.7	46.7	50.5	53.1	51.5	51.1	51.3	48.4	49.2	45.2
Hecobone d	23.3	21.1	21.5	21.5	21.3	20.0	16.3	17.2	16.6	16.5	24.3	21.8	20.8	13.6	19.7	17.7	21.0	23.2	41.9
TOTAL (81 Index) - \$36,661	100.0	61.1	66.8	80.2	109.7	117.6	141.3	128.2	130.2	155.5	103.0	111.1	93.6	101.9	99.2	95.1	79.4	90.9	19.0

TOTAL ADVERTISING \$

(81 Index) - \$24,659	100.0	72.6	78.1	89.6	-	100.6	123.0	132.7	141.7	153.6	100.0	117.6	127.9	140.3	140.6	150.2	159.1	255.2	277.5
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C.P.I./Aug. 89

	100.0	104.8	112.7	125.0	138.5	148.9	160.8	173.2	171.2	210.6	100.0	110.8	117.2	119.3	127.2	132.4	131.2	143.8	152.4
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T.P.I./Aug. 89

	100.0	101.9	106.1	110.8	123.8	134.5	144.8	151.9	167.6	183.0	100.0	115.3	135.6	151.2	177.5	208.3	226.2	344.4	304.1
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OMDA & CIGARETTES  
CALENDAR 1971-1989

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2. % CONTRIBUTION OF T/M CIGETS WITHIN INDUSTRY at \$50/(YTD Avg. '89)

	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989
IMPERIAL TOBACCO	34.87	33.21	41.17	45.95	44.75	44.80	45.18	46.32	46.32	46.32	46.32	46.32	46.32	46.32	46.32	46.32	46.32	46.32	46.32
R.J.R. MACDONALD	18.35	17.32	15.89	15.21	15.98	16.05	15.04	15.34	14.60	13.69	14.02	13.95	13.83	13.83	13.83	13.83	13.83	13.83	13.83
ROTHMAN/BEENSON & HEDES	55.35	54.78	54.05	53.68	51.28	50.40	52.74	57.81	56.84	58.03	58.25	57.57	57.28	56.84	56.84	56.84	56.84	56.84	56.84
TOTAL INDUSTRY	89.57	89.30	91.08	91.84	92.31	91.25	89.56	89.46	87.96	88.19	88.34	88.62	88.92	88.19	88.19	88.19	88.19	88.19	88.19

3. % CONTRIBUTION OF D.F. CIGETS WITHIN INDUSTRY at \$50/(YTD Avg. '89)

	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989
IMPERIAL TOBACCO	0.17	0.32	0.47	0.30	0.27	0.25	0.34	0.35	0.35	0.35	0.41	0.40	0.41	0.41	0.41	0.41	0.41	0.41	0.41
R.J.R. MACDONALD	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05
ROTHMAN/BEENSON & HEDES	0.05	0.11	0.21	0.21	0.17	0.19	0.21	0.23	0.24	0.24	0.24	0.24	0.24	0.24	0.24	0.24	0.24	0.24	0.24
TOTAL INDUSTRY	0.30	0.50	0.75	0.57	0.50	0.49	0.60	0.66	0.65	0.65	0.72	1.16	1.28	1.28	1.28	1.28	1.28	1.28	1.28

4. % CONTRIBUTION OF EXP. CIGETS WITHIN INDUSTRY at \$50/(YTD Avg. '89)

	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989
IMPERIAL TOBACCO	0.23	0.03	0.03	0.10	0.03	0.03	0.12	0.15	0.26	0.29	0.41	0.66	0.95	0.95	0.95	0.95	0.95	0.95	0.95
R.J.R. MACDONALD	0.17	0.18	0.17	0.17	0.15	0.15	0.19	0.23	0.36	0.41	0.41	0.41	0.41	0.41	0.41	0.41	0.41	0.41	0.41
ROTHMAN/BEENSON & HEDES	0.62	0.68	0.51	0.52	0.57	0.40	0.52	0.60	0.67	0.95	1.20	1.83	1.83	1.83	1.83	1.83	1.83	1.83	1.83
TOTAL INDUSTRY	1.01	0.94	0.75	0.79	0.75	0.61	0.83	0.96	1.19	1.64	2.02	2.89	2.89	2.89	2.89	2.89	2.89	2.89	2.89

5. % CONTRIBUTION OF FINE CUT WITHIN INDUSTRY at \$50/(YTD Avg. '89)

	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989
IMPERIAL TOBACCO	3.33	3.29	2.95	2.67	2.59	2.93	3.46	3.82	4.54	5.31	6.15	6.37	6.40	6.40	6.40	6.40	6.40	6.40	6.40
R.J.R. MACDONALD	3.50	2.95	2.57	2.30	2.27	2.71	3.04	3.09	3.40	3.66	3.65	3.93	3.93	3.93	3.93	3.93	3.93	3.93	3.93
ROTHMAN/BEENSON & HEDES	2.22	2.04	1.91	1.75	1.74	1.94	2.10	2.05	2.28	2.48	2.49	2.74	2.74	2.74	2.74	2.74	2.74	2.74	2.74
TOTAL INDUSTRY	9.10	8.36	7.43	6.80	6.60	7.61	8.60	8.94	10.22	11.46	12.47	13.05	13.05	13.05	13.05	13.05	13.05	13.05	13.05

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TYPICAL PRICE STRUCTURE OF A PACK OF 25 X.S CIGARETTES  
 ----- AS OF JULY 10, 1989 -----

	----- T A X E S -----				-- TRADE --		-MANUFACTURER-		-RETAIL-
	\$FED	\$PROV	\$TOTAL	%	\$	%	\$	%	PRICE
B.C.	1.47	1.25	2.72	67	0.67	17	0.65	16	4.05
ALTA.	1.47	1.20	2.67	67	0.66	17	0.65	16	3.99
SASK.	1.47	1.67	3.14	69	0.76	17	0.65	14	4.55
REVISED =====> MAN.	1.47	1.94	3.41	71	0.75	16	0.65	13	4.81
ONT.	1.47	1.25	2.73	68	0.62	15	0.55	16	3.99
QUE.	1.47	1.13	2.60	66	0.68	17	0.65	16	3.94
N.B.	1.47	2.16	3.63	72	0.76	15	0.65	13	5.04
N.S.	1.47	1.51	2.99	70	0.65	15	0.65	15	4.29
P.E.I.	1.47	1.17	2.65	67	0.66	17	0.65	16	3.35
NFLD	1.47	1.82	3.29	71	0.69	15	0.65	14	4.63
YUKON	1.47	0.80	2.27	65	0.58	17	0.65	18	3.51
N.W.T.	1.47	1.17	2.65	67	0.66	17	0.65	16	3.96
A.C.	1.47	1.30	2.78	68	0.66	16	0.65	16	4.09

TYPICAL PRICE STRUCTURE OF A TIN OF FINE CUT 200GR  
 ----- AS OF JULY 10, 1989 -----

	----- T A X E S -----				-- TRADE --		-MANUFACTURER-		-RETAIL-
	\$FED	\$PROV	\$TOTAL	%	\$	%	\$	%	PRICE
B.C.	6.48	7.60	14.08	69	2.66	13	3.66	18	20.40
ALTA.	6.48	4.00	10.48	64	2.12	13	3.66	23	16.26
SASK.	6.48	5.40	11.88	66	2.33	13	3.66	20	17.87
REVISED =====> MAN.	6.48	10.11	16.59	72	2.81	12	3.66	16	23.05
ONT.	6.48	5.74	12.21	68	2.18	12	3.66	20	18.05
QUE.	6.48	4.00	10.48	64	2.12	13	3.66	23	16.26
N.B.	6.48	10.20	16.68	72	2.71	12	3.66	16	23.05
N.S.	6.48	8.97	15.45	71	2.57	12	3.66	17	21.68
P.E.I.	6.48	3.40	9.88	63	2.03	13	3.66	24	15.57
NFLD	6.48	9.41	15.89	72	2.58	12	3.66	17	22.12
YUKON	6.48	2.28	8.76	61	1.86	13	3.66	26	14.28
N.W.T.	6.48	2.30	8.78	61	1.87	13	3.66	26	14.30
A.C.	6.48	5.77	12.25	67	2.28	13	3.66	20	18.19