GLOBAL STATE OF TOBACCO HARM REDUCTION 2024

A SITUATION REPORT

Section Three

EASTERN EUROPE AND CENTRAL ASIA

3

Report overview

The Global State of Tobacco Harm Reduction 2024: A situation report is a multi-component publication, grouped into two parts, ***Global perspectives*** and ***Regional and national insights.*** The extent to which SNP are replacing and substituting for combustible and risky oral tobacco products is the unifying theme.

Global perspectives uses the latest evidence and new data projections to report on the current global THR situation and its potential to rapidly reduce the burden of disease and mortality associated with risky tobacco use. Measuring changes in SNP uptake, policy and regulation, it considers how these factors interrelate to support or undermine progress.

Chapter One: The global smoking epidemic and the role of tobacco harm reduction
Chapter Two: The evidence for tobacco harm reduction
Chapter Three: Global progress in tobacco harm reduction
Chapter Four: Global regulation and control
Chapter Five: The challenges to tobacco harm reduction
Chapter Six: Conclusions

Regional and national insights considers the status of tobacco use and THR at the regional or national level. The document you are about to read focuses on **Eastern Europe and Central Asia**; an equivalent report for **Latin America** is available. Four countries that have enabled THR to drive down smoking rates – **Aotearoa New Zealand, Japan, Norway** and the **UK** – are also profiled.

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Eastern Europe and Central Asia

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Lead author: Giorgi Mzhavanadze

Introduction

Previous GSTHR reports have documented the development of THR, and have therefore concentrated their focus in countries or regions where the approach has already begun to take root. But there remain significant areas of the world where - while SNP may be present - their potential for harm reduction is largely unrecognised or unknown. This section explores tobacco use, tobacco control and tobacco harm reduction in Eastern Europe and Central Asia (EECA).

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the orientation of these countries towards broader international alliances significantly shapes their policies

In this section our definition of the EECA region includes Armenia, Azerbaijan, Belarus, Georgia, Kazakhstan, Kyrgyzstan, Moldova, Tajikistan, Turkmenistan, Ukraine, and Uzbekistan. Representing a vibrant tapestry of intertwined histories, cultures, religions, and aspirations, the region is home to over 180 million people. While each nation has maintained its own unique identity, there is a significant commonality among them: a shared history as part of the Soviet Union, from which they emerged as independent states in the early 1990s. This relatively recent transition proclaimed a new era, marked by the challenges of market reforms and navigating post-Soviet identity and integration.

In this context, the orientation of these countries towards broader international alliances significantly shapes their policies. This includes those related to public health and tobacco control. Notably, Georgia, Moldova, and Ukraine have all pursued aspirations to join the European Union, aligning with Western political structures and market economies. This has influenced their tobacco control and taxation policies, which often reflect EU standards and frameworks to harmonise their legislation with European norms.

Conversely, Armenia, Belarus, Kazakhstan, and Kyrgyzstan have opted to join the Eurasian Economic Union (EAEU), seeking closer economic and political ties with Russia.

Table 1 **At a glance: EECA Countries**

Country	Surface area (1000 sq. km)	Population (million)	Official language	Majority religion	Life expectancy at birth (years)	Death rate (per 1000 people)	GDP (billion US$)	GDP per capita (US$)	Total tax and contribution rate (% of profit)
Armenia	29.7	2.8	Armenian	Christians	72.0	13.0	19.5	7018.1	22.6
Azerbaijan	86.6	10.1	Azerbaijani	Muslims	69.4	7.6	78.7	7762.1	40.7
Belarus	207.6	9.2	Belarussian, Russian	Christians	72.4	16.5	72.8	7888.3	53.3
Georgia	69.7	3.7	Georgian	Christians	71.7	15.2	24.8	6675.0	9.9
Kazakhstan	2724.9	19.6	Kazakh	Muslims	70.2	9.6	225.5	11492.0	28.4
Kyrgyzstan	200.0	7.0	Kyrgyz, Russian	Muslims	71.9	5.8	11.5	1655.1	29.0
Moldova	33.9	2.5	Romanian	Christians	68.8	16.4	14.5	5714.4	38.7
Tajikistan	141.4	10.0	Tajik, Russian	Muslims	71.6	4.5	10.5	1054.2	67.3
Turkmenistan	488.1	6.4	Turkmen	Muslims	69.3	6.6	56.5	8792.5	N/A
Ukraine	603.6	38.0	Ukrainian	Christians	69.6	18.5	160.5	4534.0	45.2
Uzbekistan	448.9	35.6	Uzbek	Muslims	70.9	5.0	80.4	2255.2	31.6

Source: World Bank[1], PEW Research Center[2]

Tobacco use

Tobacco use in the EECA region varies, but combustible cigarettes and regional products like nasvay are the most prevalent forms. Nasvay is a type of smokeless tobacco product (SLT) originating from Pakistan and Afghanistan. It is also referred to as nass, naswar, or niswar.[3] A moist, powdered tobacco, often mixed with ash or slaked lime and other flavouring agents, nasvay is placed under the tongue or between the gum and lip. It is particularly popular in Tajikistan and Uzbekistan.

The Soviet era left a lasting legacy on tobacco consumption patterns, with widespread access and use facilitated by state-controlled tobacco production and distribution. However, the collapse of the Soviet Union in the 1990s saw a drastic decline in both production and consumption, disrupted by transitional challenges and supply chain issues.[4,5] By the mid-1990s, this trend had reversed, as significant investments from global tobacco companies revitalised the industry in the region.[6]

Despite these developments, tobacco control and public health generally was not a priority for many post-Soviet states amid the economic and political instability of the period. Tobacco control laws and excise taxes on tobacco products were introduced only in the late 1990s or early 2000s, and were permissive compared to western European or American standards.

It was not until the late 2010s that comprehensive smoke-free policies and advertising bans were widely implemented. The absence of early legislative and taxation measures, along with insufficient investments in public health, led to a surge in both

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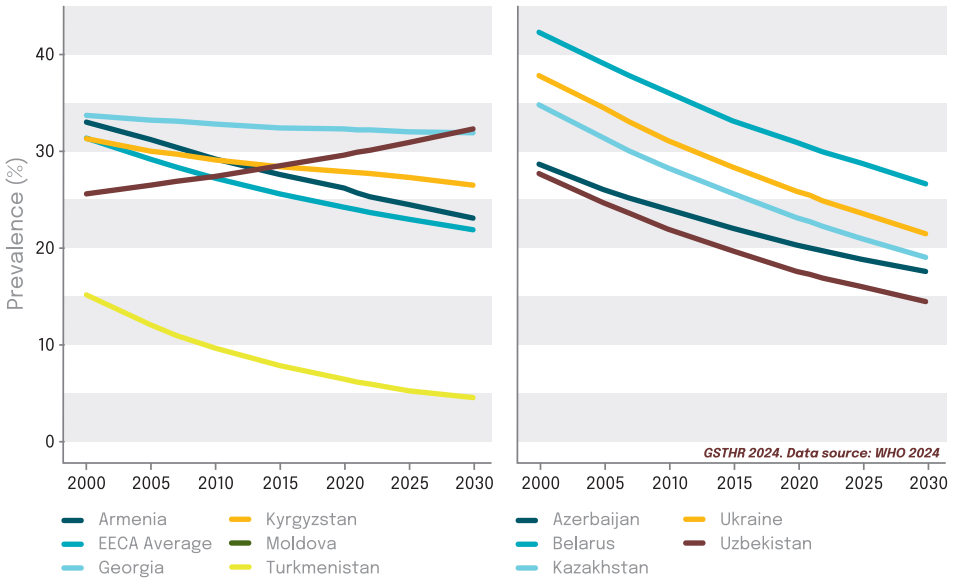
cigarette production and consumption during this period. These factors highlight the significant challenges and complexities of tobacco control in the region.[7]

Currently, tobacco use remains high across the region, though patterns of use differ markedly from country to country. As of 2022, approximately one third of adults in Georgia, Moldova, and Belarus were current tobacco users. In stark contrast, Turkmenistan reported a significantly lower prevalence of 5.6%. This lowers the regional average to 23.3%.[8] This equates to around 22.6 million tobacco users across EECA.

At 8 million people, Ukraine had the highest number of tobacco users in 2022, followed by Uzbekistan with 4.2 million, and Kazakhstan with 3 million. At the other end of the spectrum, Turkmenistan, Moldova, Armenia, and Georgia each had fewer than one million tobacco users. This is largely attributable to their smaller population sizes.

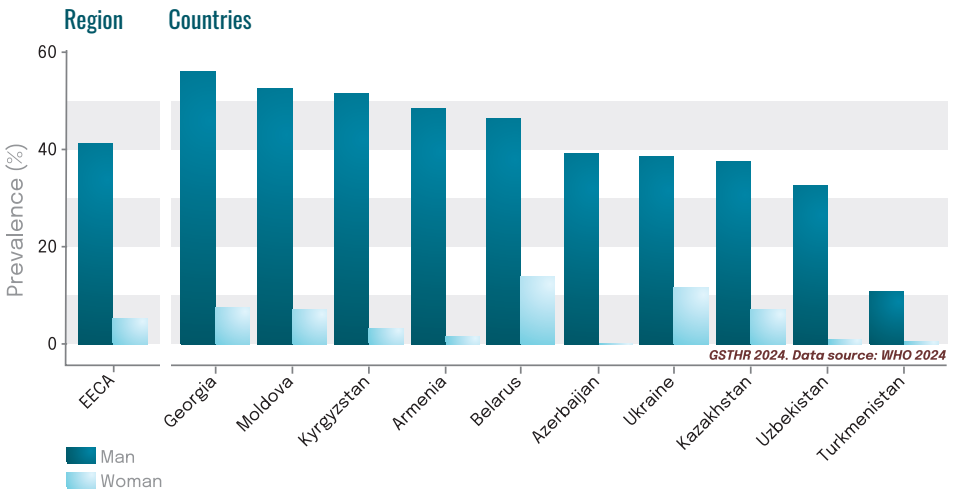
Estimates of current tobacco use prevalence in the EECA



Source: WHO Global Health Observatory[9]
Notes:
1) 'Current' tobacco use in these data refers to both daily and occasional use of tobacco products at the time when the survey was conducted.
2) The category of tobacco products includes cigarettes, pipes, cigars, waterpipes, heated tobacco products and smokeless tobacco products. This category does not cover nicotine vaping products.
3) The data presented here have been standardised by the WHO for age. This technique adjusts the prevalence rates to match the 'WHO standard population', allowing for comparison across different countries, irrespective of their age structure.
4) Data for Tajikistan are unavailable.
For more details, please refer to the WHO Global Health Observatory.[10]

The region also exhibits significant gender disparities in tobacco use, showing an alarmingly high prevalence among men. An average of 41.2% of men were current tobacco users in 2022, compared to just 5.3% of women. These gender differences are particularly pronounced in some countries, where tobacco use rates among men are exceptionally high. In Georgia, for instance, 55.9% of the male population were current tobacco users in 2022, followed closely by Moldova at 52.4%, Kyrgyzstan at 51.3%, Armenia at 48.2%, and Belarus at 46.3%. All of these countries rank within the top 25 globally for tobacco use among men, with Georgia occupying the 5th position.

Estimates of current tobacco use prevalence by gender in EECA (2022)



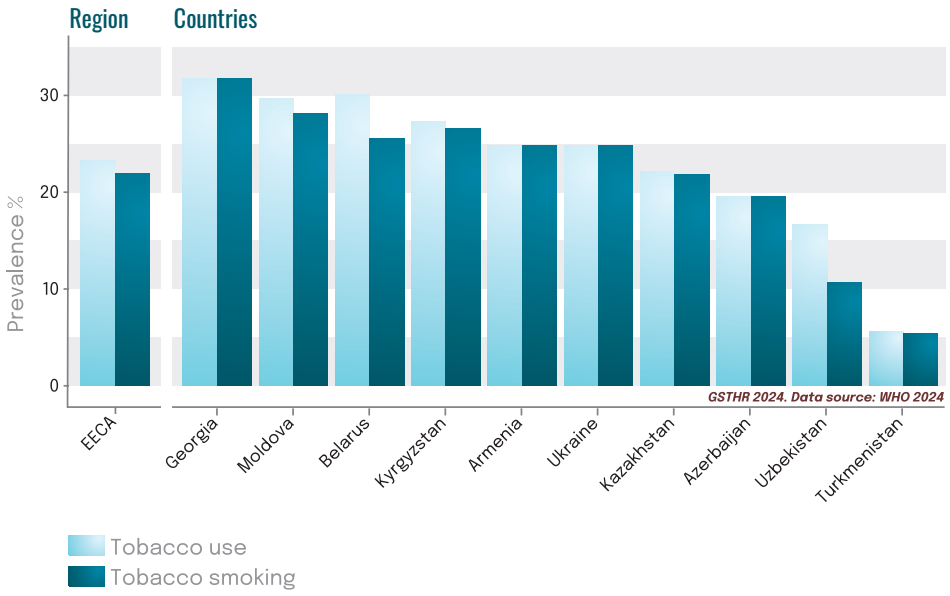
Source: WHO Global Health Observatory[11]
Note: EECA average is estimated as a simple average of all countries in the region for which data exist

The same data shows that the regional average for current tobacco use in EECA is projected to decline from 31% in 2000 to 21.5% in 2030, marking a 9.5 percentage point decrease. Belarus, Kazakhstan, Ukraine and Uzbekistan are projected to experience some of the most substantial declines in tobacco use within the region. In contrast, Georgia's tobacco use rates are projected to remain relatively unchanged in the period up to 2030, only decreasing by 1.8 percentage points. Uniquely within the region – and indeed, as a rare example globally – Moldova is actually expected to see an increase in tobacco use prevalence, from 25.2% in 2000 to 31.9% by 2030.

In Armenia and Belarus, the decline in tobacco use is expected to be more significant among men than women. Notably, Georgia is the only country where the prevalence of tobacco use among women is predicted to rise, suggesting the potential for a gender-specific cultural shift in tobacco consumption.

Tobacco smoking is the leading form of tobacco consumption in EECA, albeit with distinct variations across countries. In 2022, the region recorded an average smoking rate of 23.3%, accounting for 20.7 million current smokers. Projections indicate a decrease in these rates, from 28.2% in 2000 to an expected 20.5% by 2030.

Estimates of current tobacco use and tobacco smoking in EECA (2022)



Source: WHO Global Health Observatory[12]

In countries like Uzbekistan, the prevalence of current smoking (10.7%) is significantly lower than the overall tobacco use rate (16.7%). This underscores the notable impact of SLT, especially nasvay, on the region's patterns of tobacco consumption. According to the most recent international surveys on adult tobacco use, the prevalence of SLT is particularly high in Tajikistan (10.3%) and Uzbekistan (9.9%). This is likely to be rooted in the traditional use of nasvay and its affordability relative to cigarettes.[13]

Nasvay is predominantly used by men. About one in five adult men in Tajikistan and Uzbekistan use nasvay - a rate that exceeds male smoking prevalence. With the exception of Kyrgyzstan (5.2%) and Kazakhstan (1.4%), other countries in the EECA region report negligible rates of SLT use.

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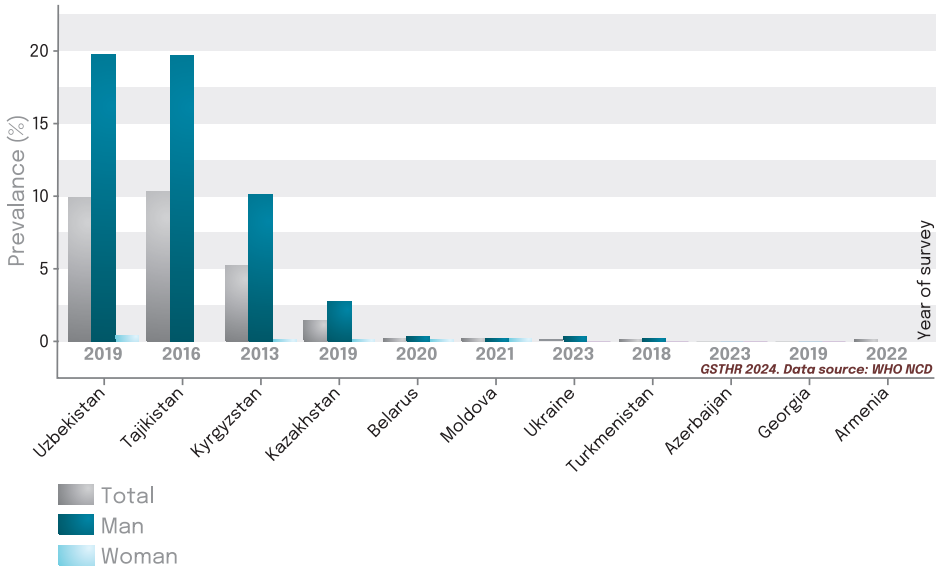
Current use prevalence of SLT in EECA according to the most recent survey



Source: Authors' compilation based on open-source data (WHO NCD Microdata Repository[14], Demographic Health Surveys[15], local household budget surveys, local tobacco use surveys)

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The burden of tobacco use

The burden of tobacco use in the EECA region is significant, with elevated mortality, disease, and economic costs due to high rates of tobacco consumption. Drawing from the Global Burden of Disease (GBD) 2019 data, tobacco use and second-hand smoking contribute to a considerable proportion of all deaths, ranging from 12% in Tajikistan to 20% in Armenia and Azerbaijan, with the EECA average standing at 17%. Smoking is the primary contributor to this health burden.[16]

The average death rate from tobacco use and second-hand smoke in the EECA region is 171 deaths per 100,000 people. However, there is a noticeable disparity among countries: Belarus, Georgia, and Ukraine report significantly higher death tolls, whereas Tajikistan and Uzbekistan, which have the lowest smoking rates, report fewer than 100 deaths per 100,000. Such variance highlights differences in health infrastructure, public health initiatives and tobacco use patterns.

As noted, consumption of tobacco in both Tajikistan and Uzbekistan is characterised by high use of nasvay. This might indicate potential public health benefits stemming from the substitution of combustible cigarettes with this historical type of oral tobacco. However, this association might be influenced by the quality of tobacco mortality data. Furthermore, the relative risks of nasvay are not well researched compared to snus, US chewing tobacco, or the more dangerous types of Asian smokeless tobacco. This is complicated by the nature of the product, as it is predominantly produced by cottage industries or homemade, with ingredients being locally grown.[17] There are more than 50 different varieties of nasvay in Central Asia. Therefore, drawing definitive conclusions about the health impacts of the product is challenging.

Over the last two decades, most countries in the region have seen a decrease in the percentage of deaths attributable to tobacco. Belarus and Armenia experienced the most notable reductions between 2000 and 2019. Conversely, however, Tajikistan, Uzbekistan, Kyrgyzstan, and Azerbaijan have witnessed an increase in the share of tobacco-attributable deaths.

Table 2 **Annual burden of mortality attributable to tobacco in EECA, 2019**

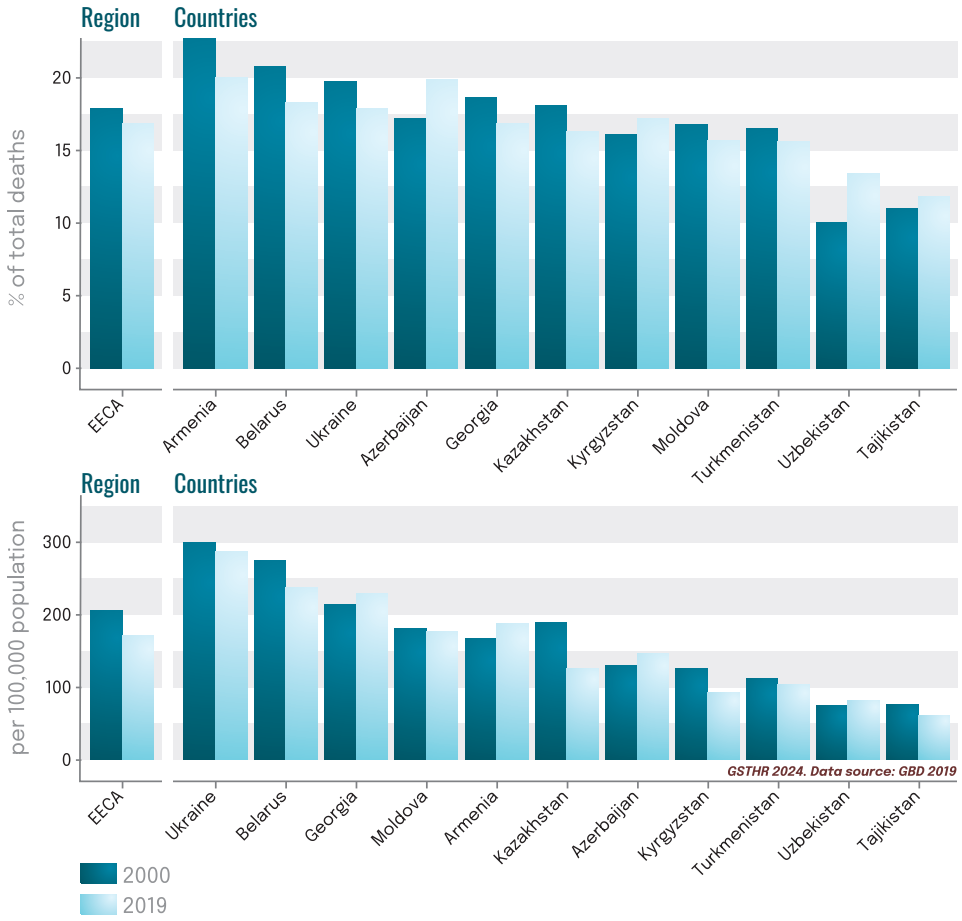
Country	All deaths	Deaths attributable to all risk factors	Deaths attributable to tobacco	Deaths attributable to smoking	Deaths attributable to all risk factors (% of total deaths)	Deaths attributable to tobacco (% of total deaths)	Deaths attributable to smoking (% of total deaths)	Death rate attributable to tobacco (per 100,000 population)
Armenia	27978	19159	5644	4864	69%	20%	17%	187
Azerbaijan	75130	54925	15043	12497	73%	20%	17%	146
Belarus	121765	89120	22377	20509	73%	18%	17%	236
Georgia	49417	36031	8389	7172	73%	17%	15%	229
Kazakhstan	139472	93994	22901	20164	67%	16%	15%	125
Kyrgyzstan	34678	23597	5996	5025	68%	17%	15%	92
Moldova	41000	29818	6485	5921	73%	16%	14%	176
Tajikistan	48706	31986	5806	4634	66%	12%	10%	61
Turkmenistan	33623	24265	5263	4044	72%	16%	12%	104
Ukraine	698663	511883	125760	113389	73%	18%	16%	286
Uzbekistan	203586	145843	27447	22193	72%	14%	11%	82
EECA	1474017	1060621	251112	220413	72%	17%	15%	171

Source: GBD 2019[18]

The overall decline in tobacco-attributable death rates in EECA from 2000 to 2019 may indicate advances in tobacco control efforts, or improvements in the diagnosis and treatment of tobacco-related diseases across the region, or a combination of both.

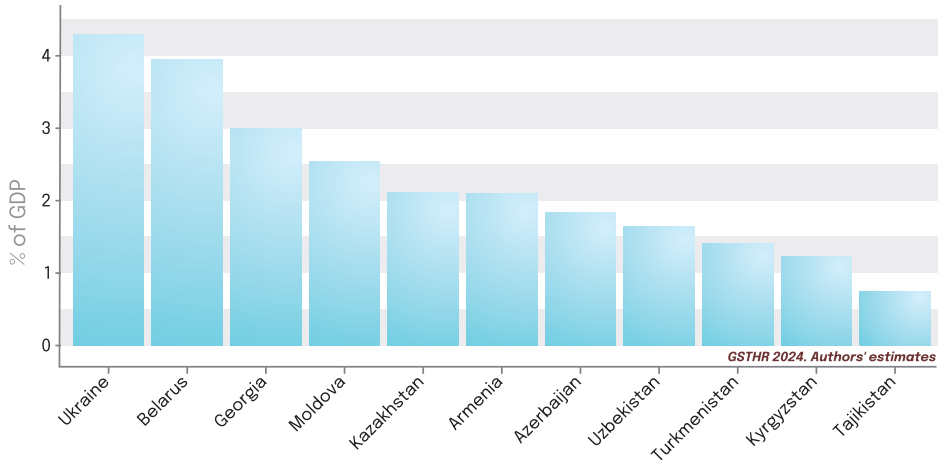
The economic consequences of tobacco use, including both direct healthcare expenditure and indirect losses in productivity due to morbidity and mortality, are profound in EECA. Ukraine faces the most severe economic impact, where the estimated costs exceed 4% of its GDP. Tajikistan is the least affected, with tobacco-related costs accounting for only 0.8% of its GDP. As well as exacerbating the pressure on these countries' economies, these costs impact their welfare and development.

Deaths attributable to tobacco in EECA



Source: GBD 2019[19]

Economic cost of tobaco use in EECA (2019)



Source: Authors' estimates based on Tobacconomics[20] and World Bank[21] data
Note: To estimate the economic burden of tobacco use, the GDP figures from 2019, expressed in local currency, are used

Tobacco control policies

At least on paper, countries in the EECA region have demonstrated a strong commitment to traditional tobacco control by ratifying or accepting the WHO FCTC. The majority of these countries joined the FCTC in the mid-2000s, with Turkmenistan, Uzbekistan, and Tajikistan coming on board in the early 2010s.[22] In addition, Georgia and Armenia have underscored their commitment by joining the FCTC 2030 project, which aims to intensify tobacco control efforts.[23]

Reflecting this commitment, the last decade has seen the implementation of comprehensive tobacco control laws across the region, closely aligned with the FCTC's requirements. These laws have introduced key legislative changes,

including the expansion of smoke-free environments, the introduction of pictorial health warnings to enhance visibility, and tightened restrictions on the advertising and promotion of tobacco and nicotine products.

Smoke-free policies have been rigorously enforced in Kyrgyzstan, Moldova, Tajikistan, Turkmenistan and Ukraine, covering a wide range of public and outdoor spaces. Armenia, Georgia, and Kazakhstan have also implemented indoor smoking bans (albeit with some specific exemptions), while Uzbekistan has recently specified smoke-free places in legislation, enhancing the comprehensiveness of its policies.

Azerbaijan and Belarus have less rigorous smoke-free policies in comparison to other states in the EECA region. In these countries, smoking is permissible in designated areas across all indoor public places, workplaces, and certain modes of transport, with specific exclusions like healthcare and educational facilities, cultural centres, taxis, and airplanes, where smoking remains strictly prohibited.

Table 3 The count of the implemented measures reported under respective WHO FCTC articles in EECA, 2023

Article number	5	5.3	6	8	9	10	11	12	13	14	15	16	17	18	19	20	Average score
Maximum count	*4*	*2*	*3*	*11*	*3*	*4*	*8*	*12*	*10*	*20*	*13*	*11*	*3*	*4*	*7*	*19*	*10*
Turkmenistan	4	2	3	11	3	3	7	11	9	15	10	11			5	15	8.9
Moldova	4	2	3	11	3	4	7	9	8	10	11	11	1	4	5	14	8.7
Kyrgyzstan	4	2	3	10	1	4	8	11	7	18	11	10	1	3	6	14	8.6
Belarus	3	2	3	8	3	4	7	10	6	16	12	11			2	14	8.2
Georgia	4	1	3	11	3	2	8	11	10	10	7	11			1	13	7.7
Armenia	3	0	3	11	3	4	6	12	0	14	9	11			4	14	7.3
Ukraine	2	1	2	11	3	4	8	6	6	4	10	10			3	11	6.9
Uzbekistan	4	2	1	11	1	0	8	9	3	8	11	10	1	4	1	16	6.3
Kazakhstan	1	1	0	9	3	2	8	8	9	12	2	11			2	13	6.0
Azerbaijan	1	1	2	6	1	4	5	9	0	6	12	8	0	4	2	7	5.2
Tajikistan	0	2	3	2	0	0	8	11	2	12	9	4			1	0	4.4

Source: 2023 Global Progress Report on Implementation of the WHO FCTC[24]
Note: Average score is estimated as a simple average of scores in article numbers standardised according to maximal count.

The region has taken a strong stance against tobacco advertising, promotion, and sponsorship. Armenia, Azerbaijan, Kyrgyzstan, Moldova, and Ukraine have all enacted comprehensive bans. Georgia, Kazakhstan, Tajikistan, Turkmenistan, and Uzbekistan enforce strict restrictions on advertising. Belarus's regulations remain the least restrictive. Regulations concerning cigarette content, flavours and disclosures vary, with some countries imposing strict controls, while others maintain less stringent regulations. Generally, however, the region exhibits uniformity in sale restrictions, banning tobacco sales in certain venues and vending machines, although regulations around internet sales and retail licensing requirements differ across countries.

There are variations in tobacco packaging and labelling requirements across the region as well, with several countries mandating pictorial health warnings. Regulatory updates are anticipated in the near future to further align tobacco packaging and labelling with WHO FCTC standards. These changes are expected to include the introduction of combined picture and text warnings, expanding the coverage of warning labels to at least 65% of the packaging in Armenia, Turkmenistan, Ukraine, and Uzbekistan. Additionally, Armenia and Georgia are moving forward with plans to implement plain packaging requirements.

Table 4 **Combustible tobacco products regulatory provisions in the EECA (as of 31 December, 2023)**

Country	Comprehensive amendments to TCL	Selling via internet	Selling via vending machine	Advertising and promotion	Minimum age restrictions on sale	Smoke-free	Flavours allowed	Additives regulated	Health warnings on packaging (sticks/device)
Armenia	2021	Allowed	Banned	Some restrictions	18+	Smoking is restricted	Some	Yes	Yes, text-only, 30%
Azerbaijan	2018	Allowed	Banned	Banned	18+	Smoking is restricted	Yes	No	Yes, text-only, 30%
Belarus	2019	Banned	Banned	Some restrictions	18+	Smoking is restricted	Yes	Yes	Yes, pictorial/ text, 50%
Georgia	2018	Banned	Banned	Some restrictions	18+	Smoking is restricted	Yes	No	Yes, pictorial/ text, 65%
Kazakhstan	2020	Banned	Banned	Some restrictions	21+	Smoking is restricted	Some	Yes	Yes, pictorial/ text, 65%
Kyrgyzstan	2021	Allowed	Banned	Banned	18+	Smoking is restricted	Yes	Yes	Yes, pictorial/ text, 65%
Moldova	2015, 2019	Banned	Banned	Banned	18+	100% smoke free	Yes	Yes	Yes, pictorial/ text, 65%
Tajikistan	2018	Banned	Banned	Banned	18+	Smoking is restricted	Some	Yes	Yes, pictorial/ text, 75%
Turkmenistan	2014	Banned	Banned	Banned	21+	100% smoke free	Yes	No	Yes, text-only, 30%
Ukraine	2012, 2022	Allowed	Banned	Banned	18+	Smoking is restricted	Yes	Yes	Yes, pictorial/ text, 50%
Uzbekistan	2023	Banned	Banned	Some restrictions	21+	Smoking is restricted	Some	Yes	Yes, pictorial/ text, 40%

Source: Campaign for Tobacco-Free Kids. Tobacco Control Laws,[25] National Tobacco Control Laws

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It is important to mention that the recent implementation of comprehensive tobacco control laws across the region has also seen a broadening of the regulatory scope to include SNP such as nicotine vapes and HTP. In the EECA region, these products have often become subject to regulations (and taxation) similar to those applied to traditional tobacco products (see below).

Use of safer nicotine products

The strong preference for traditional combustible cigarettes, and the particular affinity of some Central Asian nations for SLT, especially among men, can present challenges for the uptake of SNP among existing nicotine users in the region. However, international tobacco use surveys conducted in the mid-2010s indicated the presence of nicotine vaping products in the market. Moreover, according to market data from Euromonitor International, the first signs of HTP use in the EECA region were observed in Ukraine and Kazakhstan in 2016 and 2017, respectively.[26] The market for HTP grew in subsequent years, reaching other countries in the region after 2019.

This attracted the attention of policymakers, resulting in the inclusion of these products in tobacco control legislation. The strict regulatory environment for SNP marks a significant shift from the previously lax or non-existent tobacco control regulations in the EECA region. Nevertheless, global trends towards consumer uptake of SNP have now penetrated the region, signalling a potential change in smoking behaviours, at least in certain countries.

Belarus stands out with the highest current vaping prevalence in the region at 6.1%, a significant figure compared to other countries. Georgia and Ukraine follow, with current vaping rates of 3.9% and 3.3% respectively. In contrast, countries like Armenia, Azerbaijan, Moldova, and Uzbekistan report negligible vaping rates.

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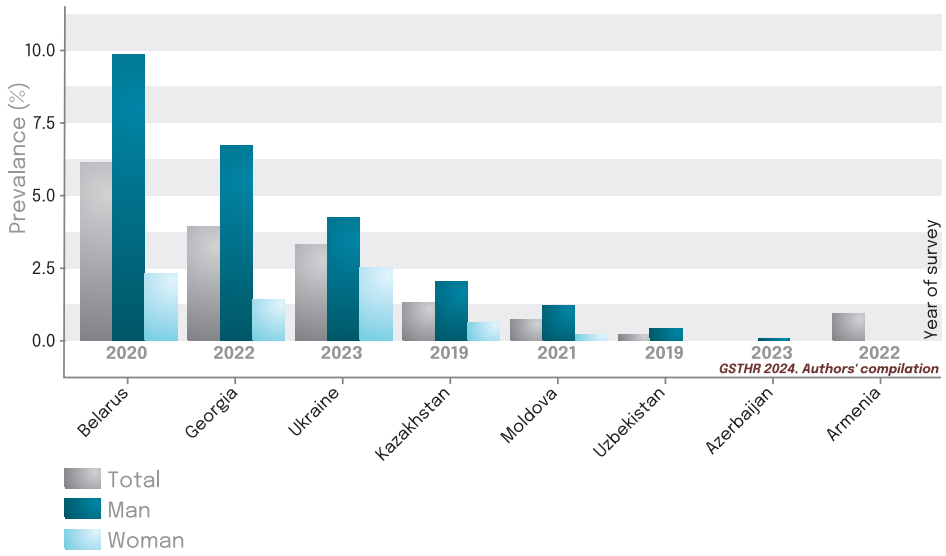
Current vaping prevalence according to the most recent survey in EECA



Source: Authors' compilation based on open-source data (WHO NCD Microdata Repository[27], Demographic Health Surveys[28], local household budget surveys, local tobacco use surveys)

The awareness and popularity of nicotine vaping products have likely increased in the region as regulations and taxation evolved. Consequently, the timing of the surveys could affect the data presented in the figure above. Countries surveyed earlier might now, in 2024, have significantly higher current vaping prevalence.

The increase in vaping prevalence in Belarus and Georgia was associated with declining smoking rates. In Kazakhstan, this decline in smoking occurred against a backdrop of stable e-cigarette uptake. For other countries in the region, existing data sources use inconsistent methodologies, making it difficult to estimate smoking and vaping trends accurately.

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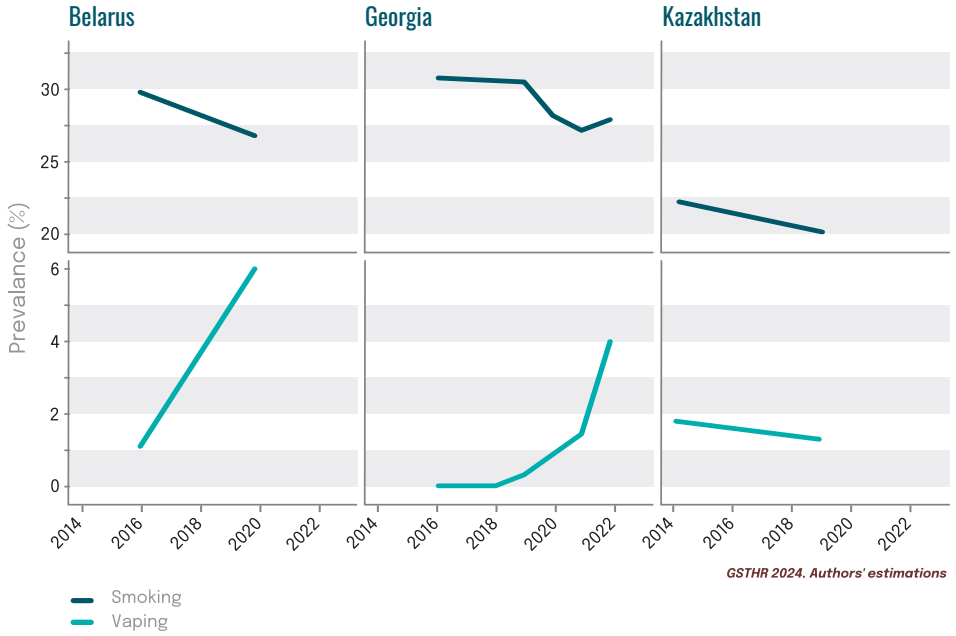
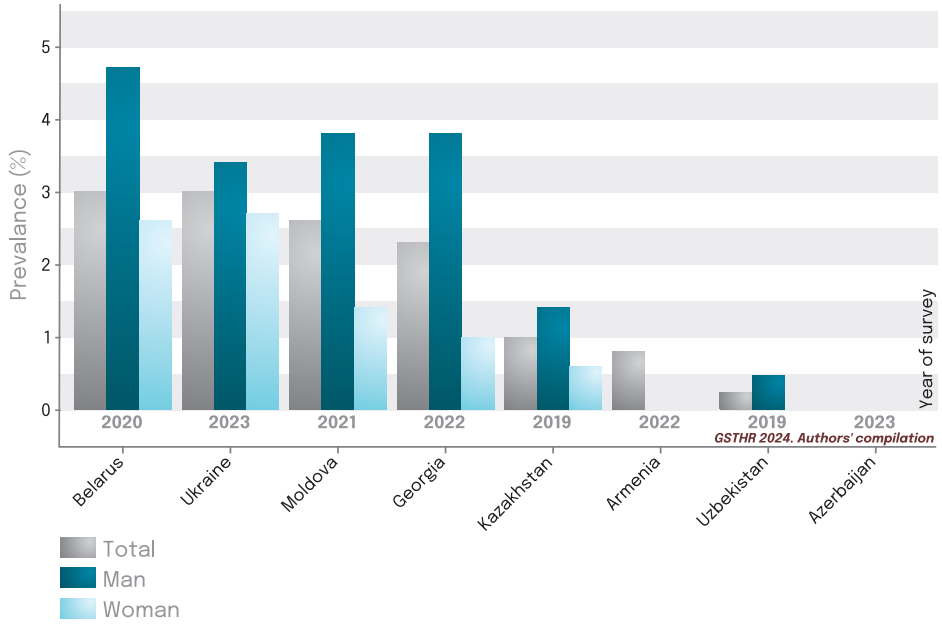
Current smoking and vaping prevalence



Source: Authors' estimations based on open-source data (WHO NCD Microdata Repository[29], local tobacco use surveys)
Note: An extrapolation method was applied to estimate the prevalence for years for which data was not available.

The use of HTP mostly follows the trends observed in vaping. Once again, Belarus (3%), Ukraine (3%) and Georgia (2.3%) show a moderate but noteworthy presence of these products and their use. Moldova deviates from this pattern, with HTP use at 2.6%, while current vaping prevalence stands at only 0.7%. Similar to the low vaping prevalence, Armenia, Azerbaijan, and Uzbekistan exhibit low rates of HTP use.

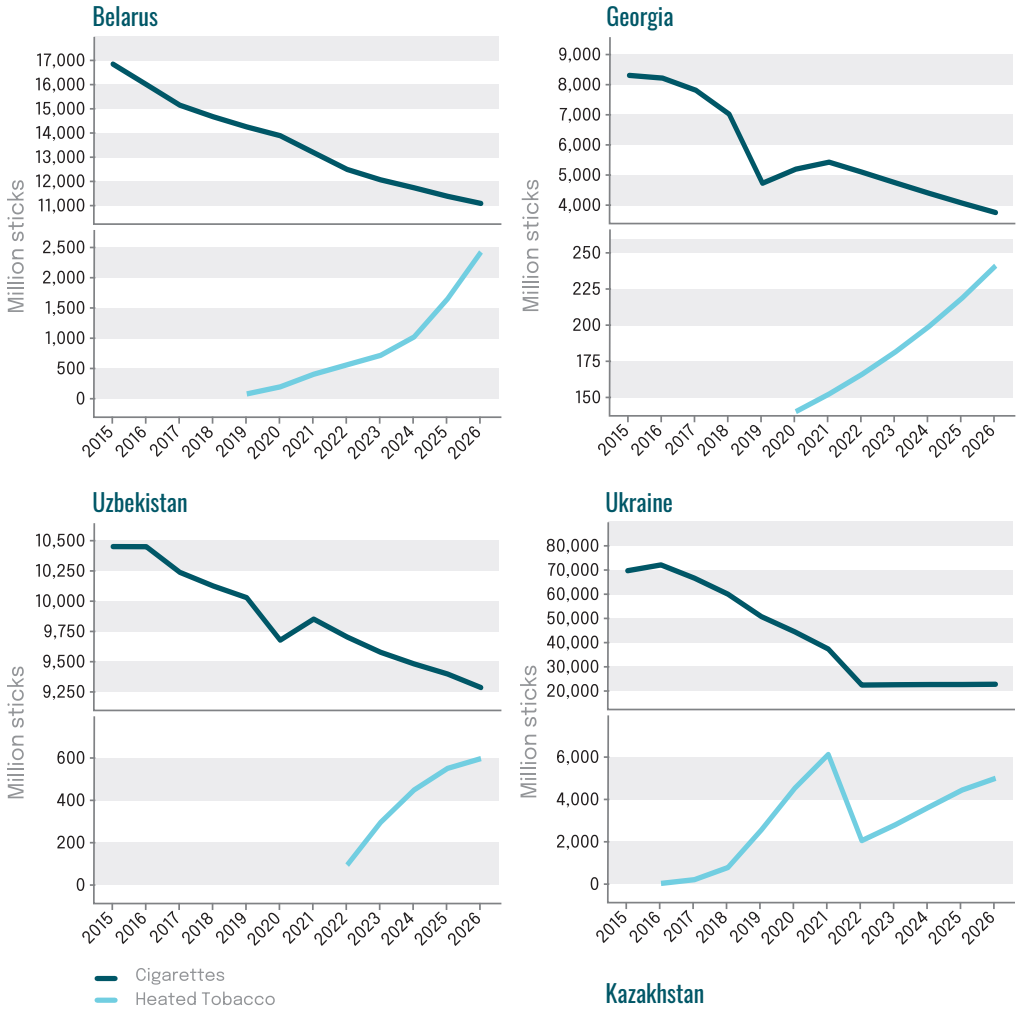
Current use prevalence of HTP according to the most recent survey in EECA



Source: Authors' compilation based on open-source data (WHO NCD Microdata Repository[30], Demographic Health Surveys[31], local household budget surveys, local tobacco use surveys)

Market data from Euromonitor International indicate an increase in the consumption of HTP across the EECA region, as reflected in analyses of countries where data are available.[32] This trend is particularly noteworthy in Belarus and Kazakhstan, with projections suggesting that HTP may account for a third of all tobacco product sales in Kazakhstan by 2026. Meanwhile, Georgia and Uzbekistan are experiencing a slower uptake in HTP use. Data from Ukraine show high volatility around 2022. This is likely reflective of the impact of the ongoing war on official tobacco sales data, and an increase in illicit activities.[33]

Retail volume of cigarettes and HTP in EECA



GSTHR 2024. Data source: Euromonitor International, 2021

Source: Euromonitor International, 2021

Belarus (3%), Ukraine (3%) and Georgia (2.3%) show a moderate but noteworthy presence of HTP use

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market research from Euromonitor International indicates an uptrend in the consumption of HTP across EECA

•

data from Ukraine show high volatility around 2022, likely reflective of the impact of the ongoing war on official tobacco sales data and an increase in illicit activities

•

the high rates of nasvay use in the region mean safer alternatives like snus or nicotine pouches could offer a valuable harm reduction strategy

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transitioning to products perceived as 'foreign' may encounter resistance

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the relative cost of safer alternatives like snus or nicotine pouches compared to cigarettes would play a crucial role in encouraging widespread adoption

Other types of SNP, such as snus or nicotine pouches, are not present in the region, at least in countries where market data is available. The only exception is Ukraine, where a small quantity of nicotine pouches was sold in 2023, totalling 17.3 million units with a retail value of $4.8 million.[34]

Considering the high rates of nasvay use in some countries of the EECA region (especially Tajikistan and Uzbekistan), access to safer alternatives like snus or nicotine pouches could offer a valuable harm reduction strategy. Given their similar methods of use to nasvay, and significantly lower health risks, snus and nicotine pouches could serve as effective substitutes. However, this strategy would hinge on broad cultural acceptance, and transitioning to products perceived as 'foreign' may encounter resistance.

Furthermore, with the exception of nasvay, all forms of SLT are banned in Tajikistan and Uzbekistan, complicating the introduction of alternatives. Economic factors, such as the relative cost of safer alternatives like snus or nicotine pouches compared to cigarettes, would also play a crucial role in encouraging widespread adoption. Under the current circumstances, the feasibility of this harm reduction approach appears limited.

the regulation of SNP demonstrates countries' alignment with the WHO's current interpretation of the FCTC and institutional messaging with regard to these products

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Azerbaijan and Georgia were the first in the region to take action to regulate SNP

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Turkmenistan stands alone in the region for enacting a complete ban on the sale and use of e-cigarettes

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the country aims to achieve tobacco- and nicotine-free status by 2025

•

these moves are indicative of a growing anti-vaping sentiment in the region

Regulation of SNP

Nicotine vaping products and HTP

The regulation of SNP reflects the evolving landscape of tobacco control in the EECA region. It also demonstrates countries' alignment with the WHO's current interpretation of the Framework Convention on Tobacco Control and institutional messaging with regard to these products.

Azerbaijan and Georgia were the first in the region to take action to regulate SNP. They extended regulations on sales, use, advertising, and sponsorship of nicotine vaping products and HTP to match those for traditional tobacco products, through comprehensive tobacco control laws enacted in 2017 and 2018, respectively.[35,36] Belarus and Moldova introduced similar regulations in 2019, followed by Armenia and Kazakhstan in 2020.[37,38,39,40,41,42]

Kyrgyzstan and Tajikistan made similar amendments to their tobacco control laws, in 2021 and 2022 respectively.[43,44] Ukraine, which had not regulated e-cigarettes and HTP until 2022, implemented new provisions in July 2023, extending smoking bans to include the use of these products, alongside prohibitions on their advertising, promotion, and sponsorship, and prohibiting the sale of flavoured e-liquids.[45,46] Uzbekistan broadened its tobacco control legislation in August 2023 in order to include regulations for nicotine vaping products and HTP.[47]

Turkmenistan stands alone in the region for enacting a complete ban on the sale and use of e-cigarettes with no clear information regarding the regulation of HTP.[48,49,50] This strict approach aligns with the country's comprehensive strategy to regulate all tobacco and nicotine delivery products, as it aims to achieve tobacco- and nicotine-free status by 2025.

Additionally, in 2023, Tajikistan banned the import, export, production, storage and trade of disposable e-cigarettes.[51] In April 2024, Kazakhstan banned the sale, distribution and advertisement of e-cigarettes and e-liquids.[52] Kyrgyzstan is similarly exploring a complete ban on vaping products.[53] These moves are indicative of a growing anti-vaping sentiment in the region.

Table 5 **Nicotine vaping products regulatory provisions in EECA (as of 31 December, 2023)**

Country	Defined in the law	Selling e-cigarettes	Selling via internet	Selling via vending machine	Legal to use	Advertising and promotion	Minimum age restrictions on sale	Restrictions on vaping in public places	Flavours allowed	Additives regulated	Excise tax on e-cigarettes (e-liquid/ device)	Max amount of nicotine in e-liquids	Health warnings on packaging
Armenia	Yes	Allowed	Allowed	Banned	Yes	Some restrictions	18+	Yes	Most flavours are allowed	Yes	Yes / No	Yes, 20 mg/g	Yes, text--only, 30%
Azerbaijan	No	Allowed	Allowed	Banned	Yes	Banned	18+	Yes	Most flavours are allowed	No	Yes / Yes	No	No
Belarus	Yes	Allowed	Banned[1]	Banned	Yes	Some restrictions	18 +	Yes	Most flavours are allowed	No	Yes / Yes	No	No
Georgia	Yes	Allowed	Banned[2]	Banned	Yes	Some restrictions	18+	Yes	Most flavours are allowed	No	Yes / No	No	No[3]
Kazakhstan[4]	Yes	Banned	Not applicable	Not applicable	Yes	Not applicable	Not applicable	Yes	Not applicable	Not applicable	Not applicable	Not applicable	Not applicable
Kyrgyzstan	Yes	Allowed	Allowed	Banned	Yes	Banned	18+	Yes	Most flavours are allowed	No	Yes / Yes	Yes, 20 mg/ml	Yes, pictorial/ text, 65%
Moldova	Yes	Allowed	Banned	Banned	Yes	Banned	18+	Yes	Most flavours are allowed	Yes	Yes / No	Yes, 20 mg/ml	Yes, text--only, 30%
Tajikistan	Yes	Allowed	Banned	Banned	Yes	Banned	18+	Yes	No information	Yes	Yes / Yes	No information	Yes, pictorial/ text, 75%
Turkmenistan	Yes	Banned	Not applicable	Not applicable	Banned	Banned	Not applicable	Not applicable	Not applicable	Not applicable	Not applicable	Not applicable	Not applicable
Ukraine	Yes	Allowed	Allowed	Banned	Yes	Banned	18+	Yes	Only tobacco flavours or no flavours	Yes	Yes / No	Yes, 20 mg/ml	Yes, text--only, 30%
Uzbekistan	Yes	Allowed	Banned	Banned	Yes	Some restrictions	21+	Yes	Most flavours are allowed	Yes	Yes / No	Yes, 20 mg/ml	Yes, pictorial/ text, 65%*

Source: Tobacco in Australia,[54] Campaign for Tobacco-Free Kids. Tobacco Control Laws,[55] Global taxation of ENDS and ENNDS: a cross-country evaluation and Recommendations for Taxation,[56] WHO FCTC[57], National Tobacco Control Laws

Notes:

1. Selling e-cigarette devices (‚electronic smoking systems') is exempted from the ban on internet sales.
2. The sale of nicotine-free vaping products is allowed via the internet.
3. The law requires an 'information sheet' to be placed inside the packaging of e-cigarettes.
4. The regulatory provisions for Kazakhstan have been updated with recent changes as of April 2024.
5. Production, import, storage, whole and retail sale of disposable e-cigarettes has been banned since March 2023.

Table 6 **HTP regulatory provisions in EECA (as of 31 December, 2023)**

Country	Defined in the law (sticks/ device)	Selling HTP (sticks/device)	Selling via internet (sticks/device)	Selling via vending machine (sticks/device)	Legal to use	Advertising and promotion (sticks/device)	Minimum age restrictions on sale	Restrictions on use in public places	Flavours allowed	Taxes on HTP sticks (sticks/ device)	Health warnings on packaging (sticks/device)	Additives regulated
Armenia	No / No	Allowed / Allowed	Allowed / Allowed	Banned / Banned	Yes	Some restrictions / No information	Yes 18+	Yes	Most flavours are allowed	Yes / No	Yes, text-only, 30% / No information	Yes
Azerbaijan	No / No	Allowed / Allowed	Allowed / Allowed	Banned / Banned	Yes	Banned / No information	Yes 18+	Yes	Most flavours are allowed	Yes / No	Yes, text-only, 30% / No information	No
Belarus	No / No	Allowed / Allowed	Banned / Allowed	Banned / Banned	Yes	Some restrictions / Allowed	Yes 18+	Yes	Most flavours are allowed	Yes / Yes	No[1] / No	No
Georgia	Yes / Yes	Allowed / Allowed	Banned / Some restrictions	Banned / Banned	Yes	Some restrictions / Some restrictions	Yes 18+	Yes	Most flavours are allowed	Yes / No	Yes[2] / No	No
Kazakhstan	No / No	Allowed / Allowed	Banned / Banned	Banned / Banned	Yes	Some restrictions / Some restrictions	Yes 21+	Yes	Most flavours are allowed	Yes / No	Yes, pictorial/ text, 65% / No	Yes
Kyrgyzstan	Yes / Yes	Allowed / Allowed	Allowed / Allowed	Banned / Banned	Yes	Banned / Banned	Yes 18+	Yes	Most flavours are allowed	Yes / No	Yes, pictorial/ text, 65% / Yes, pictorial/text, 65%	Yes
Moldova	Yes / Yes	Allowed / Allowed	Banned / Banned	Banned / Banned	Yes	Banned / Banned	Yes 18+	Yes	Most flavours are allowed	Yes / No	Yes, text-only, 30%/ No	No
Tajikistan	Yes / Yes	Allowed / Allowed	Banned / Banned	Banned / Banned	Yes	Banned / Banned	Yes 18+	Yes	No information	Yes / No	Yes, pictorial/ text, 75% / No	Yes
Turkmenistan	No information[3]											
Ukraine	Yes / Yes	Allowed / Allowed	Allowed / Allowed	Banned / Banned	Yes	Banned / Banned	Yes 18+	Yes	Most flavours are allowed	Yes / No	Yes, text-only, 30% / No	Yes
Uzbekistan	Yes / Yes	Allowed / Allowed	Banned / Banned	Banned / Banned	Yes	Some restrictions / Some restrictions	Yes 21+	Yes	Only tobacco, mint and menthol flavours	Yes / No	Yes, pictorial/ text, 65% / yes, pictorial/text, 65%	Yes

Source: Campaign for Tobacco-Free Kids. Tobacco Control Laws,[58] National Tobacco Control Laws, WHO FCTC Global Progress Report 2023[59], WHO FCTC[60], Campaign for Tobacco-Free Kids. HEATED TOBACCO PRODUCTS Global Regulation[61]

Notes:

1. A warning about the dangers of consumption of tobacco products must be included (as an insert) in a package of 'smokeless tobacco products', which, by definition under the law, includes HTP sticks.
2. Beginning on January 1, 2025, the law will require both text and picture health warnings for HTP sticks.
3. The existing sources do not provide definitive information on whether the sale and use of HTP is banned in Turkmenistan.[62,63,64]

All countries permit the sale and use of HTP, although legislative approaches differ. Some have incorporated explicit definitions of HTP sticks and devices into their laws, amending tobacco control regulations accordingly. Others categorise HTP as tobacco products, and consider their use as a form of smoking. Regardless of these variations, in practice, HTP sticks and their use are equated with combustible cigarettes and smoking throughout the EECA region.

At the time of writing, therefore, all EECA countries enforce consistent laws regarding smoke-free areas, sales restrictions, and the advertising and promotion of nicotine vaping products and HTP, similar to those applied to combustible cigarettes. However, some differences emerge, mainly in packaging and labelling requirements, with some countries adopting more tolerant approaches for these products.

all countries permit the sale and use of HTP, although legislative approaches differ

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in practice, HTP sticks and their use are equated with combustible cigarettes and smoking throughout the EECA region

Smokeless tobacco (SLT) and oral safer nicotine products

EECA countries have adopted various approaches to regulate SLT, including oral categories of SNP like Swedish-style snus and nicotine pouches. Moldova was among the first to enforce strict regulations by banning the production and sale of all SLT products along with snus in 2007. However, nicotine pouches are exempt from this ban, as they are classified under tobacco legislation as nicotine-containing products.[65] In 2015, Belarus banned the manufacture, storage, and sale of SLT products meant for sucking and chewing, although it allows tobacco-free SLT products.[66]

Some Central Asian countries have taken drastic steps in regulating SLT. Turkmenistan began by banning the use of nasvay in public places in 2004, eventually prohibiting its production, import, sale, and consumption by 2008.[67] This comprehensive ban extended to all forms of SLT in 2013, excluding sniffing tobacco.[68] In 2016, Turkmenistan prohibited the import of loose tobacco and tobacco cultivation, further reducing the potential for nasvay production.

The trend towards stricter SLT regulation spread across Central Asia, with Kazakhstan banning all types of SLT including oral categories of SNP in 2020.[69] Kyrgyzstan, Tajikistan, and Uzbekistan followed in subsequent years, with similar comprehensive bans on the production, import, and circulation of all types of SLT including oral SNP, but excluding nasvay.[70,71,72]

While Armenia and Ukraine have targeted specific types of SLT and oral SNP for prohibition, Azerbaijan and Georgia have adopted a more permissive approach, allowing the manufacture, import and sale of any SLT or oral SNP.

In some countries where SLT or certain types of oral SNP are not banned, their use is – somewhat curiously – prohibited in smoke-free areas. Additionally, all countries in the region require SLT products to carry text-based or pictorial health warnings and have enacted laws or regulations banning direct and indirect advertising of all tobacco products, including SLT.

EECA countries have adopted various approaches to regulate smokeless tobacco, including oral categories of SNP

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some Central Asian countries have taken drastic steps in regulating smokeless tobacco

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in some countries where SLT or certain types of oral SNP are not banned, their use is prohibited in smoke-free areas

Table 7 **SLT and oral SNP regulatory provisions in EECA (as of January 31, 2024)**

Country	Production, import and sale				Use in public places				Health warning requirements				Advertising and promotion			
	Nicotine pouches	Snus	Nasvay	SLT	Nicotine pouches	Snus	Nasvay	SLT	Nicotine pouches	Snus	Nasvay	SLT	Nicotine pouches	Snus	Nasvay	SLT
Armenia	Allowed	Allowed	Allowed	Chewing SLT is banned	Prohibited in some	Prohibited in some	Prohibited in some	Prohibited in some	No information	Text-only warning on 30% of the principal display areas (front and rear)			Some forms of direct and indirect advertising are banned			
Azerbaijan	Allowed	Allowed	Allowed	Allowed	No information	Prohibited in some	Prohibited in some	Prohibited in some	No information	Text-only warning on 30% of the principal display areas (front and rear)			Some forms of direct and indirect advertising are banned			
Belarus	Allowed	Tobacco--free snus is allowed	Banned	Sniffing SLT is allowed	No information	Prohibited	Prohibited	Prohibited in some	No information	Leaflet with text-only warning	Not applicable	Leaflet with text-only warning	Some forms of direct and indirect advertising are banned			
Georgia	Allowed	Allowed	Allowed	Allowed	Allowed	Allowed	Allowed	Allowed	No information	Text-only warning on 30% of the principal display areas (front and rear)			Some forms of direct and indirect advertising are banned			
Kazakhstan	Banned	Banned	Banned	Banned	Prohibited	Prohibited	Prohibited	Prohibited	Not applicable	Not applicable	Not applicable	Not applicable	All forms of direct and indirect advertising are banned			
Kyrgyzstan	Banned	Banned	Allowed	Banned	Prohibited	Prohibited	Prohibited in some	Prohibited	Not applicable	Not applicable	Pictorial/ Text warning, 65%	Not applicable	Some forms of direct and indirect advertising are banned			
Moldova	Allowed	Banned	Banned	Banned	No information	Prohibited	Prohibited	Prohibited	No information	Not applicable	Not applicable	Not applicable	All forms of direct and indirect advertising are banned			
Tajikistan	Banned	Banned	Allowed	Banned	Prohibited	Prohibited	Prohibited in some	Prohibited	Not applicable	Not applicable	Yes, the percentage not specified	Not applicable	Some forms of direct and indirect advertising are banned			
Turkmenistan	Banned	Banned	Banned	Sniffing SLT is allowed	Prohibited	Prohibited	Prohibited	Prohibited in some	Not applicable	Not applicable	Not applicable	Not applicable	All forms of direct and indirect advertising are banned			
Ukraine	Allowed	Allowed	Allowed	Allowed	No information	Prohibited in some	Prohibited in some	Prohibited in some	No information	Text-only warning on 30% of the principal display areas (front and rear)			Some forms of direct and indirect advertising are banned			
Uzbekistan	Banned	Banned	Allowed	Banned	Prohibited	Prohibited	Prohibited in some	Prohibited	Not applicable	Not applicable	Pictorial/ Text warning, 65%	Not applicable	Some forms of direct and indirect advertising are banned			

Source: WHO[73,74] Tobacco Control Laws[75], Duren M, Atella L, Welding K, et al. Nicotine pouches: a summary of regulatory approaches across 67 countries. Tobacco Control 2024;33:e32-e40[76]

Taxation of nicotine vaping products and HTP

Aligning with WHO FCTC recommendations, EECA countries have integrated nicotine vaping products and HTP into their national taxation frameworks, often mirroring the tax structures for traditional tobacco products. Until 2017, no EECA country had implemented excise taxes on these products, but in April of that year, Georgia introduced specific taxes on e-liquids. Almost six years later, Armenia followed suit, by initiating a tax on e-liquids from January 1, 2023.

Armenia's move seems to have triggered a regional trend. Several EECA countries increased their excise tax rates on e-liquids, e-cigarette devices, and disposables in 2023 and 2024.[77,78,79,80,81,82] As of January 2024, Armenia, Azerbaijan, Belarus, Georgia, Ukraine, and Uzbekistan apply excise taxes to all e-liquids, irrespective of their nicotine content. In contrast, some countries only tax nicotine-containing e-liquids. Azerbaijan, Belarus, Kyrgyzstan, and Tajikistan specifically tax vaping devices, whereas Georgia and Moldova impose taxes on disposable devices at the same rate as e-liquids (per ml of containing liquid). Uniquely, Tajikistan sets its excise tax in Euros, diverging from the common practice of using a country's national currency.

EECA countries have integrated nicotine vaping products and HTP into their national taxation frameworks

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Armenia, Azerbaijan, Belarus, Georgia, Ukraine, and Uzbekistan apply excise taxes to all e-liquids, irrespective of their nicotine content

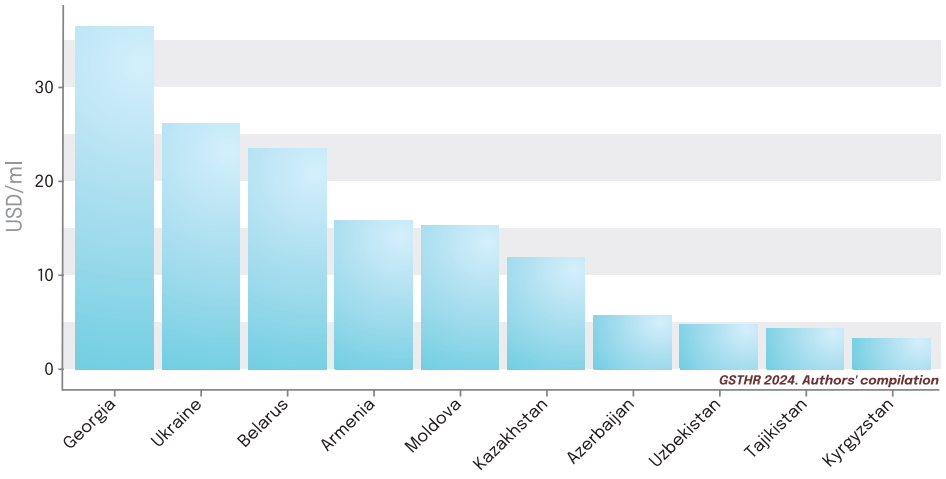
Table 8 Taxation of nicotine vaping products in EECA (as of January 31, 2024)

Country	Date of introduction of excise tax	Tax system	Tax rate and unit (local currency)	Tax rate and unit	Base	Explicit excise tax on vaping devices
Armenia	Jan. 1, 2023	Specific	AMD 65.00/ml	USD 0.16/ml	All e-liquids	No
Azerbaijan	Feb. 10, 2019	Specific	AZN 0.10/ml; AZN 2/unit for disposable devices	USD 0.06/ml; USD 1.18/unit for disposable devices	All e-liquids and disposable devices	Yes
Belarus	Jan. 1, 2022	Specific	BYN 0.77/ml; BYN 2.72/ e-cigarette device	USD 0.24/ml; USD 0.85/ e-cigarette devices	All e-liquids and e-cigarette devices	Yes
Georgia	Apr. 27, 2017	Specific	GEL 1.00/ml	USD 0.37/ml	All e-liquids and disposable devices	No
Kazakhstan	Jan. 1, 2018	Specific	KZT 55.00/ml	USD 0.12/ml	Nicotine-containing e-liquids	No
Kyrgyzstan	Jul. 5, 2019 Jan. 4, 2022	Specific	KGS 3.00/ml; KGS 100.00/ e-cigarette devices	USD 0.03/ml; USD 1.13/ e-cigarette devices	Nicotine-containing e-liquids and e-cigarette devices	Yes
Moldova	Jan. 1 2022	Specific	LEI 2.70/ml	USD 0.16/ml	Nicotine-containing e-liquids and disposable devices	No
Tajikistan	2022	Specific	EUR 0.04/ml; EUR 0.5/ e-cigarette devices	USD 0.04/ml; USD 0.55/ e-cigarette devices	Nicotine-containing e-liquids and e-cigarette devices	Yes
Turkmenistan	Not applicable	Not applicable	Not applicable	Not applicable	Not applicable	Not applicable
Ukraine	Jan. 1, 2021	Specific	UAH 10/ml	USD 0.27/ml	All e-liquids	No
Uzbekistan	Jun. 1, 2020	Specific	UZS 605.00/ml	USD 0.05/ml	All e-liquids	No

Source: Tobacco in Australia,[83] Global taxation of ENDS and ENNDS: a cross-country evaluation and Recommendations for Taxation,[84] Vecherka News Tajikistan[85], Informarket Moldova[86], Tax Code of Azerbaijan,[87] Tax code of Armenia[88]
Note: Excise tax rates in USD are provided using official exchange rates as of 31 December of 2023 according to Treasury - UN Operational Rates of Exchange

At the time of writing, Georgia has the highest excise tax rate on e-liquids in the EECA region, at USD 0.37/ml, followed by Ukraine and Belarus with rates of USD 0.27/ml and USD 0.24/ml, respectively. In contrast, Kyrgyzstan, Tajikistan, Uzbekistan, and Azerbaijan have set their excise taxes on e-liquids to less than USD 0.1/ml. Notably, Azerbaijan has introduced an excise tax of USD 1.18 per unit for disposable e-cigarettes, and Kyrgyzstan applies a tax rate of USD 1.13 per device containing e-liquid. This means Azerbaijan and Kyrgyzstan are the two countries with the highest device-related tax rates in the region. Additionally, Kyrgyzstan has implemented minimum prices for disposable e-cigarettes and e-cigarette devices at USD 3.39 and USD 15.80 respectively, underscoring their approach to regulating the market for nicotine vaping products.

Excise tax rate on e-liquids (as of January 31, 2024)



Source: Tobacco in Australia,[89] Global taxation of ENDS and ENNDS: a cross-country evaluation and Recommendations for Taxation,[90] Vecherka News Tajikistan[91], Informarket Moldova[92], Tax Code of Azerbaijan,[93] Tax code of Armenia[94]
Note: Excise tax rates in USD are provided using official exchange rates as of 31 December of 2023 according to Treasury - UN Operational Rates of Exchange

Before 2017, EECA countries categorised HTP sticks alongside traditional raw tobacco, pipes or other tobacco products, basing taxes on weight. Amendments to tax codes have since distinguished HTP as a separate category, shifting to a stick-based excise tax system. Only Belarus, Tajikistan, and Uzbekistan continue to tax HTP sticks by weight.

Georgia has the highest excise tax rate on e-liquids in the EECA region

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Azerbaijan and Kyrgyzstan have the highest vaping device-related tax rates in the region

Table 9 **Taxation of HTP in EECA (as of January 31, 2024)**

Country	Date of introduction of excise tax	Tax system	Tax rate and unit (local currency)	Tax rate and unit	Base	Explicit excise tax on vaping devices
Armenia	2020	Specific	AMD 3400	USD 8.48	1000 sticks	No
Azerbaijan	2019	Specific	AZN 16	USD 9.42	1000 sticks	No
Belarus	2022	Specific	BYR 332.44 / BYR 2.72	USD 103.76 / USD 0.85	1 kg / 1 device	Yes
Georgia	2018	Mixed	GEL 1.70 + 30% of retail price	USD 1.44	20 sticks	No
Kazakhstan	2017	Specific	KZT 11130	USD 24.55	1000 sticks	No
Kyrgyzstan	2022	Specific	KGS 2750	USD 31.04	1000 sticks	No
Moldova	2019	Specific	LEI 1,103*	USD 63.89	1000 sticks	No
Tajikistan	2022	Specific	EUR 15**	USD 16.65	1 kg	No
Turkmenistan	No information					
Ukraine	2021	Specific	UAH 2516.54	USD 67.09	1000 sticks	No
Uzbekistan	2020	Specific	UZS 382000	USD 30.96	1 kg	No

Source: Campaign for Tobacco-Free Kids: HEATED TOBACCO PRODUCTS AND CIGARETTES TAXES AND PRICES AROUND THE WORLD[95], Vecherka News Tajikistan[96], Informarket Moldova[97], Tax Code of Azerbaijan,[98] Tax code of Armenia[99], Tax Code of Uzbekistan[100]
Note: Excise tax rates in USD are provided using official exchange rates as of 31 December of 2023 according to Treasury - UN Operational Rates of Exchange

Georgia is unique in the EECA region for its mixed excise tax system, incorporating both specific and *ad valorem* components for HTP sticks, while other countries have adopted a specific excise tax rate. Belarus notably applies taxes not just to HTP sticks, but also to the devices themselves. Furthermore, Armenia, Kyrgyzstan, Moldova, and Ukraine have enacted legislation for annual increases in excise tax rates on all tobacco products, including HTP sticks.

An analysis of excise tax rates for HTP sticks versus cigarettes across the region shows diverse approaches. Georgia and Kyrgyzstan apply identical rates to both HTPs and cigarettes, whereas Moldova and Ukraine impose a specific excise tax on HTP sticks and a mixed excise tax on cigarettes. As of 2023, the effective excise tax rates are equal in these countries across both products. Paradoxically in public health terms, therefore, consumers in these countries face the same tax burden for choosing the less risky option.

However, Azerbaijan, Armenia, Belarus, Kazakhstan, Tajikistan and Uzbekistan offer significantly lower excise taxes on HTP sticks compared to cigarettes, suggesting a regulatory inclination towards promoting heated products. In these countries, theoretically, the behavioural nudge created by the differential in tax is in the right direction to help reduce the harms of combustible tobacco – pointing consumers towards the less risky product. In reality, however, as we shall see in the next section, lower excise rates do not always translate to lower retail prices.

Notably, Kyrgyzstan and Kazakhstan both established a minimum retail price for HTP sticks, at 107.5 (USD 1.21) and KZT 720 (USD 1.59) per 20 sticks respectively.[101,102,103]

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paradoxically consumers in Georgia, Kyrgyzstan, Moldova and Ukraine face the same tax burden for choosing the less risky option

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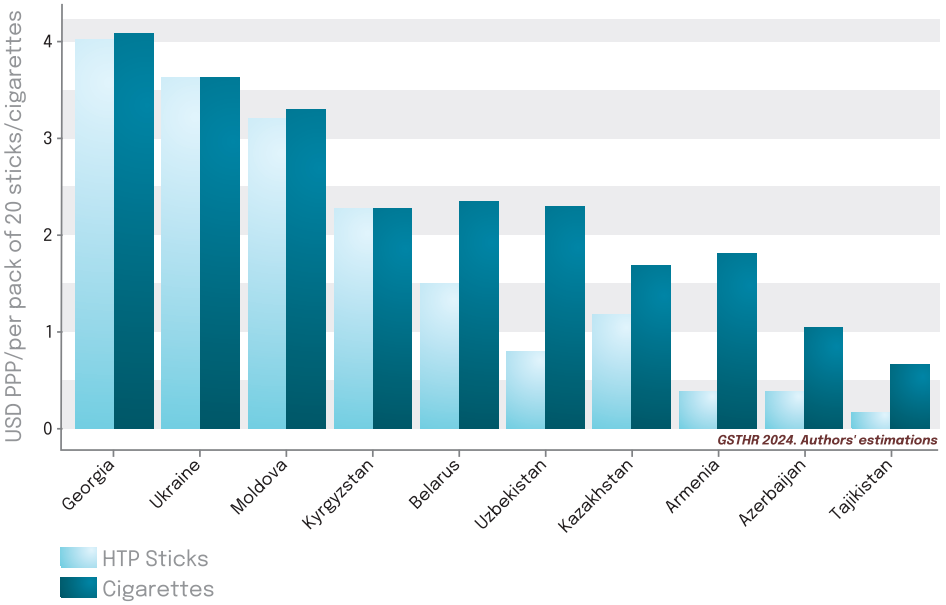
in Azerbaijan, Armenia, Belarus, Kazakhstan, Tajikistan and Uzbekistan, the behavioural nudge created by the differential in tax is in the right direction

Excise tax rate on HTP sticks and cigarettes in EECA (2023)



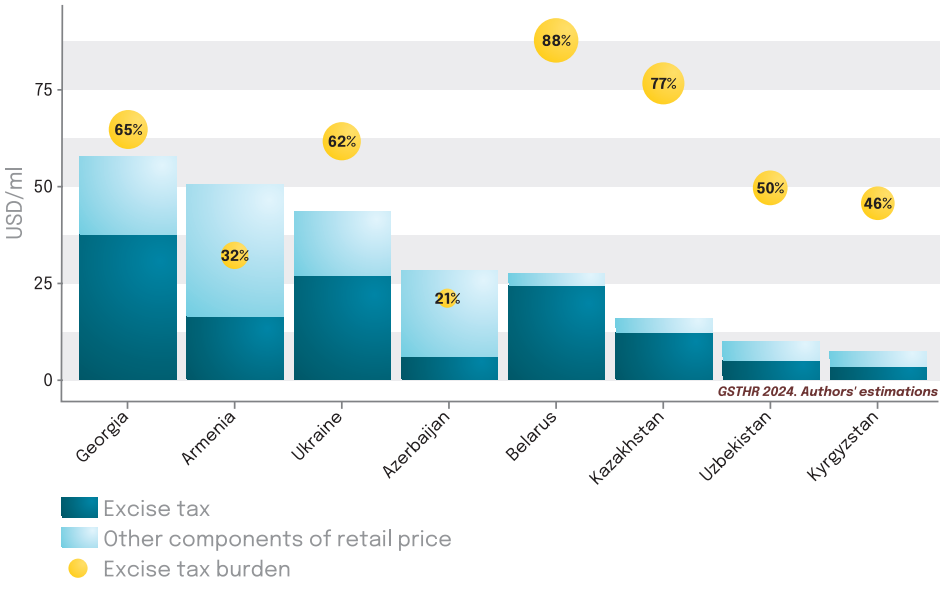
Source: Authors' estimations, Campaign for Tobacco-Free Kids: HEATED TOBACCO PRODUCTS AND CIGARETTES TAXES AND PRICES AROUND THE WORLD[104], Vecherka News Tajikistan[105]
Notes:
1. For countries that tax HTP by weight, excise tax rates are estimated on the assumption that 1 HTP stick contains 0.305 gram of tobacco.
2. Georgia and Kyrgyzstan have the same excise structures and rates for both cigarettes and HTP sticks.
3. For Tajikistan, the latest data on excise tax for cigarettes and HTP sticks available in public sources were from 2021 and 2022 respectively. Therefore, the current excise rates might differ from what is shown in the table.

Retail prices of SNP

While taxation plays an important role in determining the prices of tobacco and nicotine products, the experience of the EECA countries shows that higher excise taxes do not always translate into higher retail prices for SNP. Factors beyond excise taxes, such as Value Added Tax (VAT), profit tax levels, proximity to SNP production countries, and industry strategies, including profit margins, probably influence price formation. This results in considerable variability in retail prices across the region, underscoring the complexity of pricing dynamics beyond the issue of taxation.

Among countries with available data, Georgia records the highest retail prices for e-liquids at USD 0.57/ml, followed by Armenia at USD 0.50/ml, and Ukraine at USD 0.47/ml.[106] Interestingly, Belarus and Kazakhstan, where the excise tax burden is the heaviest at 88% and 77% respectively, have some of the lowest retail prices in the region. Only in Kyrgyzstan and Uzbekistan are e-liquids more affordable, priced at USD 0.07/ml and USD 0.10/ml respectively.

Price and excise tax burden on e-liquids in EECA (as of April 2023)



Source: Authors' estimations, Global taxation of ENDS and ENNDS: a cross-country evaluation and Recommendations for Taxation[107]
Notes:
1. Excise tax rates in USD are provided using official exchange rates as of 31 December of 2023 according to Treasury - UN Operational Rates of Exchange
2. In the case of Armenia, the figures present the excise tax rate and the median price of e-liquid as of January 2024. The median price of e-liquid is taken from an online retail shop[108] (estimated per 1 ml from the price of a 30 ml e-liquid bottle).

The countries with the highest retail prices for e-liquids also have the highest retail prices for HTP sticks. Georgia is the most expensive (2.7$ per pack of 20 sticks), followed by Moldova (2.6$) and Azerbaijan (2.5$). HTP sticks are cheapest in Kyrgyzstan (1.3$), Uzbekistan (1.3$) and Belarus (1.3$). Interestingly, in Azerbaijan and Armenia, where the excise tax burdens on HTP sticks are among the lowest in EECA at 7% and 8% respectively, retail prices are higher than in Belarus, where the excise tax burden is 37%.

Notably, in all countries except Uzbekistan, HTP sticks are cheaper than cigarettes. Armenia, Azerbaijan, and Belarus illustrate this pattern most clearly. However, it is important to note that the prices of cigarettes used for these comparisons are based on Marlboro, considered a premium cigarette brand.[109]

When using the price of the most sold cigarette brand instead, the relative cost comparison between HTP and cigarettes shifts, making HTP sticks more expensive than cigarettes in all countries of the region except Armenia. This highlights that cigarettes remain more affordable than HTP, especially when considering the additional cost of the device. This disparity in affordability may pose a significant financial barrier to the substitution of cigarettes with safer alternatives, particularly in low-income populations.

the experience of the EECA countries shows that higher excise taxes do not always translate into higher retail prices for SNP

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considerable variability in retail prices across the region underscores the complexity of pricing dynamics beyond the issue of taxation

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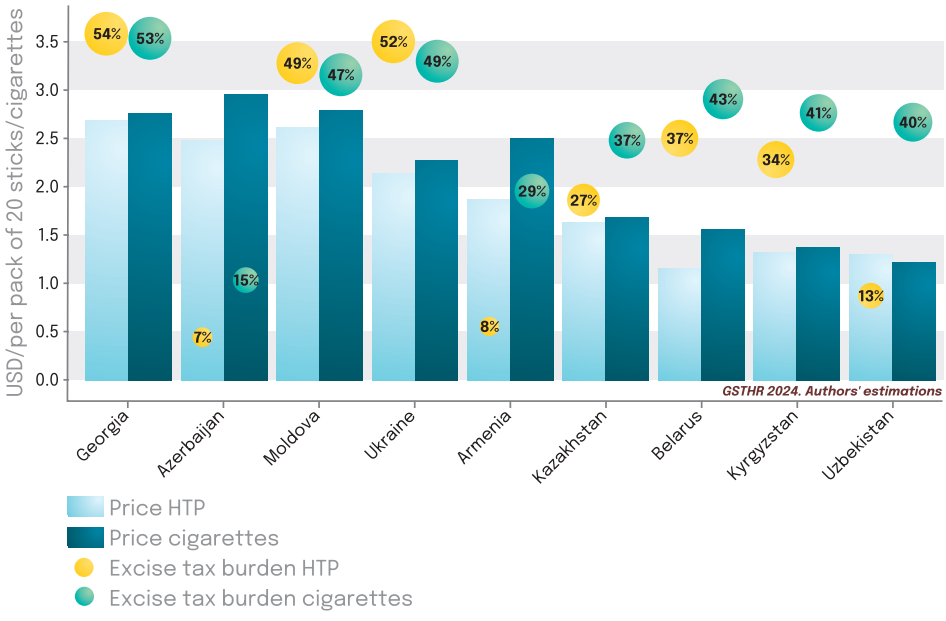
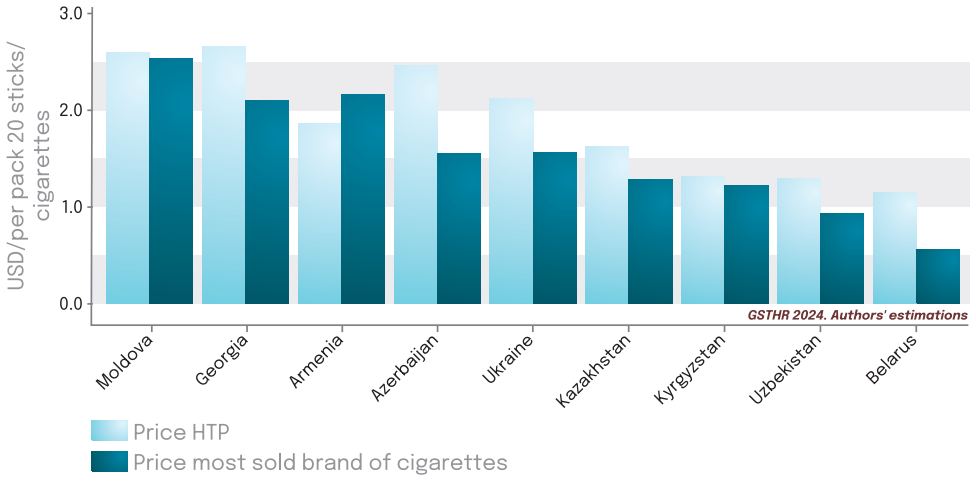
Price and excise tax burden on cigarettes and HTP in EECA (2023)



Source: Authors' estimations, Campaign for Tobacco-Free Kids: HEATED TOBACCO PRODUCTS AND CIGARETTES TAXES AND PRICES AROUND THE WORLD[110]
Notes:
1. Excise tax rates in USD are provided using official exchange rates as of 31 December of 2023 according to Treasury - UN Operational Rates of Exchange.

Source: Authors' estimations, Campaign for Tobacco-Free Kids: HEATED TOBACCO PRODUCTS AND CIGARETTES TAXES AND PRICES AROUND THE WORLD[111], WHO[112]
Notes:
1. Excise tax rates in USD are provided using official exchange rates as of 31 December of 2023 according to Treasury - UN Operational Rates of Exchange.
2. To estimate the price of the most sold brand of cigarettes for 2023, we used the price ratio between the premium brand and the most sold brand of cigarettes in 2020 from WHO, along with the 2023 cigarette prices sourced from CTFK.

Price on most sold brand of cigarettes and HTP in EECA (2023)



Public perceptions

Public understanding of the health risks associated with tobacco and nicotine use, along with perceptions of the relative and absolute risks of various products including SNP, is under-researched in the EECA region. Only a few countries have added questions on this topic to their recent tobacco and nicotine use surveys. This has led to gaps in the literature on the impact of campaigns and policies aimed at reducing tobacco use over the last decade.

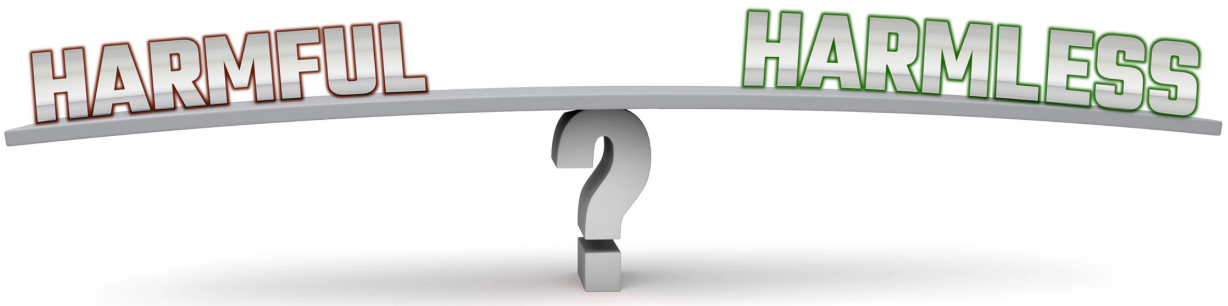
In Armenia, a significant majority of the population recognises the dangers of smoking both filtered (77.9%) and unfiltered (88.5%) cigarettes, labelling them as "very harmful".[113] Yet, a small segment, around 3%, perceives smoking as "harmless".

When it comes to nicotine vaping products, 62.6% of the population view them as "very harmful", while 9.4% consider them "less harmful" and 6.1% "harmless". Perceptions of HTP follow a similar pattern: 60.4% view them as "very harmful", 9.6% as "less harmful", and 5.2% as "harmless".

With "smokeless tobacco, chewing gum, snus", 49% find them "very harmful", with 6.6% "less harmful" and 4.8% "harmless". However, uncertainty about the level of risk associated with SNP use is very common. About 20% of people are uncertain about the risk posed by nicotine vaping products; this rises to 25% for HTP and 40% for snus.

In Georgia, over half of respondents (53.7%) are unsure whether vaping is more harmful than smoking combustible cigarettes.[114] Of those who have formed an opinion, 32.8% believe vaping is more harmful, compared to 13.5% who believe that smoking is more harmful.

Kazakhstan's survey shows that 87.6% of adults aged 15 and older acknowledge the severe health risks of smoking, with a notable difference between current smokers (78.9%) and non-smokers (89.8%).[115] Opinions about nicotine



vaping products vary; 20.2% of adults view them as less harmful than cigarettes, with a split between smokers (25.0%) and non-smokers (18.4%). Similarly, 21.1% of adults consider HTPs less harmful, a view shared by 29.1% of current smokers and 17.9% of non-smokers.

In Ukraine, a vast 95.2% acknowledge that smoking causes severe health issues.[116] About three-quarters believe that nicotine vaping products and HTPs are "addictive and can cause serious health problems". However, 47.7% of HTP users cite a perceived reduced in harm compared to cigarettes as their reason for using the products. Among current vapers, 29% use these products because they believe they are less harmful.

Cessation services

In the EECA region, the availability of smoking cessation services is notably lacking. No EECA countries have achieved the highest MPOWER score for support in helping tobacco users quit. This metric, developed by the WHO, tracks the implementation of effective cessation strategies.

Table 10 reveals the existing gaps across the region in offering specific tobacco cessation aids. While some countries provide quit lines free of charge and legally sell cessation products like Bupropion, Cytisine, NRT, and Varenicline, the practical availability of treatments for tobacco dependence in primary care facilities, hospitals, health professionals' offices, and community settings is alarmingly sparse.

Armenia, Belarus, Kyrgyzstan, and Uzbekistan offer some support for cessation; their score of 4 indicates that at least one cessation service is cost-covered. However, Azerbaijan, Georgia, and Ukraine, scoring 3, offer NRT and some cessation services without covering the cost, potentially making these essential aids inaccessible to many tobacco users keen to quit.

The lack of robust cessation services, coupled with limited coverage, suggests that people in the EECA region are largely left on their own when attempting to stop smoking. For many, this lack of support will result in continued tobacco use.

No EECA governments have publicly endorsed the effectiveness of harm reduction strategies in tobacco control or implemented them in their policies. On the contrary, health authorities often disseminate misinformation about SNP, such as inaccurate claims that nicotine vaping products are as harmful as cigarettes or that they do not aid people to quit smoking.[117] The focus on the absolute harms of nicotine vaping products, while ignoring their substantially lower relative harms compared to combustible cigarettes, exacerbates the challenge of tobacco control in the region.[118,119]

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no EECA governments have publicly endorsed the effectiveness of harm reduction strategies and health authorities often disseminate misinformation about SNP

Table 10 **Availability of particular tobacco cessation aids in EECA (MPOWER - Offer help to quit tobacco use)**

Country	Access to a toll-free quit line	Product legally sold				Treatment for tobacco dependence available in					Offering help to quit tobacco use (MPOWER)
		Bupro-pion	Cytisine	NRT	Varenicline	Health clinics or other primary care facilities	Hospitals	Offices of health pro-fessionals	Other settings	Community	
Armenia	Yes	Yes	Yes	Yes	Yes	Yes in some	No	No	No	No information	4
Azerbaijan	Yes	No	Yes	No	No	No	No	No	Yes in some	No	3
Belarus	Yes	No	No	Yes	Yes	Yes in some	Yes in some	No	Yes in some	No	4
Georgia	Yes	No	Yes	Yes	Yes	Yes in some	No	No	No	No	3
Kazakhstan	No	Yes	Yes	Yes	Yes	Yes in some	No	Yes in some	Yes in some	Yes in some	4
Kyrgyzstan	Yes	No	N/A	No	Yes	Yes in most	No	Yes in most	Yes in some	Yes in some	4
Moldova	Yes	No	No	No	No	Yes in some	No	No	Yes in some	No information	4
Tajikistan	No	No	No information	No	No	No	No	No	No	No information	2
Turkmenistan	Yes	Yes	No	Yes	Yes	No	No	Yes in most	Yes in some	No	4
Ukraine	Yes	No	Yes	Yes	Yes	Yes in some	No	No	No	No	3
Uzbekistan	No	No	Yes	Yes	Yes	Yes in some	Yes in some	No	No	No	4

Source: WHO Global Health Observatory
Note: MPOWER groupings for the indicator 'Offering help to quit tobacco use' are: 1 = Data not reported; 2 = None; 3 = NRT and/or some cessation services (neither cost-covered); 4 = NRT and/or some cessation services (at least one of which is cost-covered); 5 = National quit line, and both NRT and some cessation services cost-covered.

Conclusion

Despite some progress in reducing smoking rates across the EECA region over the past two decades, smoking remains a critical policy challenge. The persistence of elevated smoking rates, with nearly half of the region's countries exhibiting alarmingly high figures, underscores the complexity of tobacco control here.

The prevalence of smoking among men is particularly concerning, with every second man reported as a smoker in certain countries. This is indicative of slow progress in reducing, and, in some instances, a regression in smoking rates. Additionally, the high prevalence of SLT use, particularly nasvay in Central Asia, suggests a nuanced landscape of tobacco consumption that extends beyond conventional cigarettes.

At the same time, the current approach to smoking cessation in the EECA region reveals significant service provision and coverage gaps, compounded by prevalent scepticism and resistance toward harm reduction strategies. Misinformation about SNP and their role in smoking cessation, propagated by some authorities, exacerbates these challenges, distorting public perception and potentially hindering effective tobacco control efforts.

The regulatory landscape, meanwhile, reflects a cautious stance toward SNP, often treating them on a par with combustible cigarettes. This does not align with principles of risk-proportionate regulation. In this context, the anti-vaping sentiment prevalent in Central Asian countries within the EECA region is particularly striking. Turkmenistan has imposed a complete ban on nicotine vaping products, with ambiguous regulations for HTP. This trend continues,

with Tajikistan and Uzbekistan's recent bans on disposable e-cigarettes, Kazakhstan recently implementing a total ban on nicotine vaping products, and Kyrgyzstan planning to follow suit.

Despite all these barriers, the increasing presence of SNP in countries like Belarus, Georgia, Kazakhstan, Moldova, and Ukraine suggests an openness among people who smoke to experiment with emerging tobacco and nicotine products. This trend, albeit nascent and facing considerable opposition, highlights a potential pathway for harm reduction and tobacco control, suggesting that with supportive policies and public education, SNP could play a role in reducing the tobacco burden in the EECA region.

One notable gap in the EECA region is the absence of THR consumer advocacy. Unlike other parts of the world, there are no known consumer advocacy movements related to THR at present in the EECA region. This extends beyond THR to general consumer advocacy, which is also significantly underdeveloped. Despite extensive searches of online sources, academic literature, and consultations with local experts and researchers, no material on THR consumer advocacy in the EECA region has been identified. This absence will impede tobacco harm reduction efforts, as consumer advocacy can play a crucial role in informing public policy, educating consumers, and countering misinformation.

To effectively address the multifaceted challenges of tobacco use in the region, a concerted effort is required. Access to a broader range of cessation services should be expanded, and harm reduction should be embraced as a cornerstone of tobacco control policies. Essential to this strategy are robust public education campaigns, designed to rectify widespread misinformation and uncertainties regarding SNP. This could foster an environment conducive to effective tobacco control and harm reduction efforts. Ultimately, embracing a comprehensive approach that incorporates harm reduction alongside traditional tobacco control measures could significantly contribute to public health improvements in the EECA region.

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