All that glitters is not gold

Plain packaging – Quo vadis?
An industry perspective

John Noble
British Brands Group
Why can’t I be different and unusual….like everyone else?

Viv Stanshall, singer-songwriter
Choice

Self-expression

Diversity

Colour

Better solutions

Different
Plain packaging – Quo vadis?
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Quo vadis? – for consumption?
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- Consumption / health
- Commodity
- Price competition
- Innovation
- Product quality
- Retail
- Fakes
- Different
- Brand loyalty
- Pack design
- Health warnings
Quo vadis? – for consumption?

Consumption / health

- Commodity
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THE JURY IS STILL OUT
Quo vadis? – for counterfeiters?

Supply side
- Fewer designs to copy
- No pack shape variations
- No specialist production
- No extra enforcement?

Demand side
- Harder to spot?
- Greater price sensitivity?
- Reduced brand loyalty?
- Access without age control

= Greater economies of scale
  Lower costs
  Increased demand?

THE JURY IS STILL OUT
THE JURY IS STILL OUT
Quo vadis? – for wider industry?

• Impact on the “brand” of IP?
• Tobacco a special case?
• UK: Health Committee review of Government’s alcohol strategy
• Tobacco a guinea pig for policy, with wide implications….

Consumption
Competition
Innovation
Illicit trade
Trade agreements
Intellectual property