

Emergence and growth of 'natural' cigars in the USA

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Evidence of the impact of misleading descriptors on cigarette packaging and advertising on consumer perceptions and use intentions is well documented.^{1–4} Prominent examples include use of descriptors such as 'natural', 'organic,' and 'additive-free' by the brand Natural American Spirit (NAS), which have been found to mislead consumers to believe that NAS cigarettes are less harmful than other cigarette brands.^{2,5} This strategy has been successful for NAS, which saw a 97% increase in market share in the USA from 2014 to 2019,⁶ despite overall declines in cigarette smoking over this time period.⁷

In 2015, the US Food and Drug Administration (FDA) sent a warning letter to Santa Fe Natural Tobacco Company (SFNTC), a subsidiary of Reynolds American Inc. (RAI), for using descriptors in NAS marketing that communicated reduced risk without an FDA order to do so.⁸ An agreement between FDA and SFNTC/RAI was reached in 2017 specifying that the company would remove 'additive-free' and 'natural' from their packaging and advertising, with the exception of their brand name which remained *Natural American Spirit*.⁹ The terms of this agreement appear to have been specific to NAS and have not discouraged other cigarette brands from using similar descriptors.^{10–11} As we previously highlighted,¹⁰ non-cigarette tobacco products also appear to be mimicking NAS' marketing strategy. For example, Backwoods, a mass merchandise cigar/cigarillo brand, which has promoted their 'all-natural leaf wrapper' since at least 2018,¹² is the fastest growing cigar brand, with the largest increase in market share (16.1% average annual percentage change (AAPC)) from 2009 to 2020, compared with other major cigar brands.¹³

Recent marketing efforts in business-to-business (B2B) publications suggest that other cigar brands are following suit. Indeed, in B2B publications, we have seen an uptick in the past several months in the promotion of 'natural' and/or 'leaf' styles of cigars from major mass merchandise brands, including Swisher Sweets, Dutch Masters and Game (figure 1). This uptick is notable, as nature-related imagery and language have not been highly prevalent in cigar advertising in the past, according to content analyses published in the past decade.^{14–15} Black & Mild has also promoted their own 'natural' cigar (figure 2).¹⁶ In these advertisements, the term 'natural' is consistently paired with the word 'leaf' and/or a leaf image. In one advertisement from Dutch Masters for their 'Dutch Leaf' cigar, they state that 'all-natural shoppers purchase more' and that all-natural leaf cigars are outperforming other cigars in terms of sales. In an advertisement

for Swisher Sweets Leaf cigars, which states on the package that they use 'all-natural tobacco,' the brand states that 'more than ever, your customers are looking for something real,' and highlights that the product will lead to quick profits.

With the industry promoting these products and their growth in B2B publications, we conducted our own analysis of cigar sales data to examine these trends. We estimated changes in US cigar sales by analysing data obtained from the Nielsen Company for all convenience stores (C-stores). For cigars, Nielsen provides data on features such as brand, flavour, pack size and claims (including 'natural') that are printed on unique packages sold (identified by unique UPC numbers). Using previously employed approaches,^{13–17} we coded Nielsen data for the presence of 'natural' descriptors on cigar packaging from 2017 to 2021 and analysed these data with National Cancer Institute's Joinpoint, a segmented regression analysis application, to assess trends. We found that sales of cigars with a 'natural' descriptor were both prominent and growing, and that sales of such products greatly drove the overall increase in the cigar market during this time frame. The overall sales of cigars in C-stores, adjusted for inflation, significantly increased from \$3.25 billion in 2017 to \$3.66 billion in 2021 (AAPC, 3.1% (95% confidence interval [CI], 0.5% to 5.7%), $p=0.031$). Sales of cigars with a 'natural' descriptor grew at a faster pace (AAPC, 14.1% (95% CI, 9.8% to 18.5%), $p=0.002$), whereas sales of cigars without a 'natural' descriptor were flat and trended downwards (AAPC, -0.9% (95% CI, -3.0% to 1.2%), $p=0.264$). As such, the market share for cigars with a 'natural' descriptor increased from 22.3% in 2017 to 33.9% in 2021. During this same period, the number of unique cigar products sold with a 'natural' descriptor increased from 342 to 467, while products without 'natural' descriptors decreased from 2693 to 2410. We also observed differences in pack sizes between cigars with and without 'natural' descriptors. Among those with 'natural' descriptors, two packs (31.8%) and five packs (46.3%) comprised the majority of dollar sales in 2021. Most dollar sales among cigars without the 'natural' descriptors were singles (27.4%) and two packs (28.1%). Furthermore, the top 10 selling brands using a 'natural' descriptor were all cheaper mass merchandise cigar/cigarillo brands, rather than premium brands.

The growth of cigars that use the 'natural' descriptor is concerning for several reasons. As stated earlier, the cigarette literature demonstrates that the term 'natural' can mislead consumers, including young people,^{3–5 18} to believe that a product is less



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Figure 1 Advertisements from CSP Daily News and Convenience Store Magazine, 2021–2022.

harmful than other brands.³ ‘Leaf’ imagery and language in the marketing of these cigars may implicitly communicate reduced harm, based on findings that NAS’ pro-environment packaging was rated as less harmful to oneself and others than another brand.¹⁹ Furthermore, both the ‘natural’ descriptor and ‘leaf’ imagery may increase product appeal. Indeed, research on cigarettes shows that both the ‘natural’ descriptor and imagery of flora (eg, leaves) are associated with curiosity and interest in the product among youth and young adults.²⁰ Flora has also been found to increase cigarette advertisement receptivity among young people.²¹ Furthermore, one experimental study of Game cigarillos found that the ‘natural leaf’ descriptor increased young adults’ favourable beliefs about the quality of the cigar

and its users.²² With the pending flavour ban for cigars,²³ cigar companies may continue to heavily promote these products and potentially increase reliance on their use as a product benefit and selling feature in the absence of flavours. Given that cigars are growing in popularity¹³ and are disproportionately used by vulnerable populations,^{24 25} the FDA should consider policies to restrict the use of potentially misleading descriptors such as ‘natural’ in cigar marketing, as well as communication efforts to counter misperceptions of harm resulting from the use of these descriptors.

In addition to the mass merchandise cigar market, ‘natural’ descriptors on premium cigars are likely to play a role in the regulation of all cigar products. The definition of premium



Figure 2 Advertisement for Black & Mild Natural Wrap cigars, 2018 (<https://trinketsandtrash.org/detail.php?artifactid=13391&page=1>).

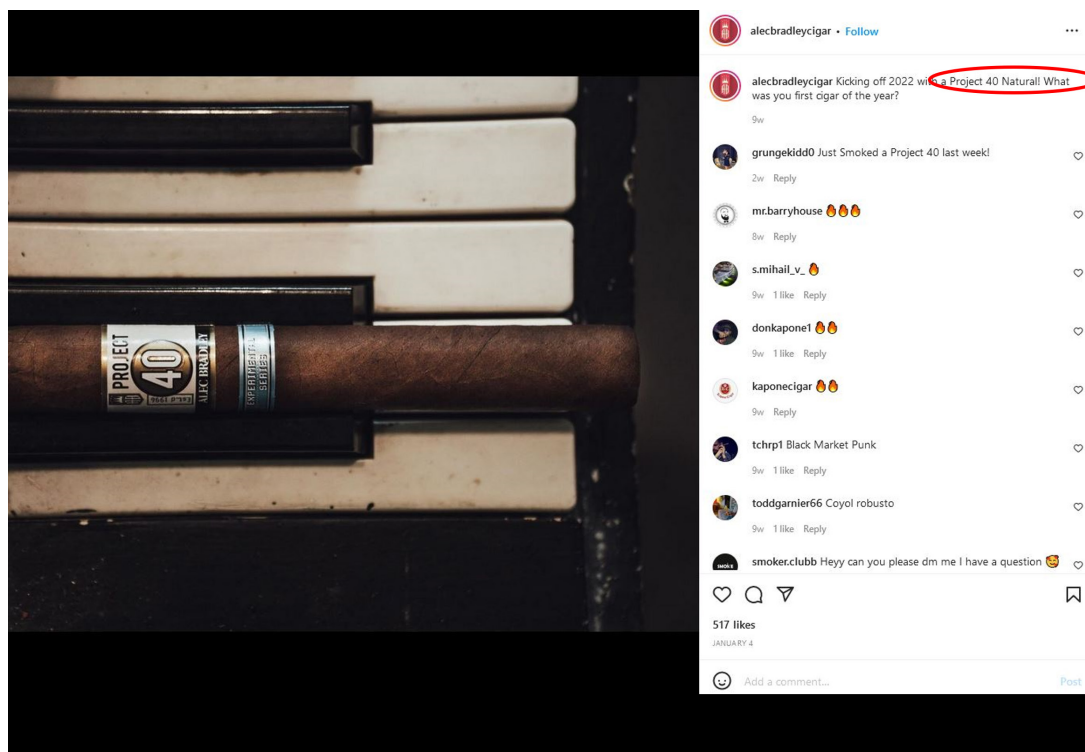


Figure 3 Instagram post from the Alec Bradley premium cigar account highlighting a natural premium cigar (4 January 2022).

cigars currently employed by FDA inherently defines premium cigars as ‘natural’ (ie, whole leaf, no characterising flavours, no additives)²⁶ and many premium cigars are described using this descriptor (figure 3). Despite the fact that premium cigars make up a small percent of the market,²⁷ cigar trade associations that represent premium cigar companies have been successful in having regulations overturned that would require premarket approval for premium cigars and health warning statements on all cigar products.^{28–29} In the context of FDA’s withdrawal of an advance notice of proposed rulemaking for premium cigars³⁰ and an impending flavoured cigar ban,²³ ‘natural’ messaging could mark another foray by cigar companies to circumvent rules and manipulate their products to retain sales.^{31–33}

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