

**GTNF2023**

# **2FIRSTS Report Collection**

**SEP. 2023**



**2FIRSTS**

This report is intended for professionals of the e-cigarette industry, minors are prohibited from reading this report.



## Foreword

The Global Tobacco and Nicotine Forum (GTNF), universally seen as an event of importance, spearheads crucial dialogues about the future trajectories of the tobacco and nicotine industries. This platform allows professionals from the nicotine industry worldwide to convene, converse, and, quite critically, engage in dialogue in a sphere where the global regulators, leading tobacco companies, harm-reduction advocates, and experts seldom converge elsewhere.

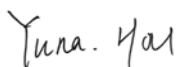
2FIRSTS is honored to have partaken and executed comprehensive coverage of this pivotal event. I witnessed a multitude of insightful topic discussions, brilliant perspectives, and expert insights. Notably, Brian King, Director of the FDA's Tobacco Center, also delivered a profound presentation on 'Tobacco Product Regulation in the United States,' intricately weaving through regulatory complexities and future outlooks. Julian Cheung from JTI Asia Pacific shed light on the global concern of illegal tobacco trade, presenting an abundance of professional data that highlighted the gravity and intricacies of the issue. A particularly illuminating panel discussion—'Everyone's Responsibility: Protecting Minors from Tobacco Use'—brought the FDA and JUUL together, crafting a multifaceted dialogue where JUUL also introduced its new product, offering a pragmatic case for analysis and debate.

Certainly, the valuable speeches are not just these, and this serves as our reason for creating this brochure. We have bound important reports into this volume, hoping it can traverse time constraints and be widely spread.

The current e-cigarette industry is at a crucial moment of profound transformation, facing significant challenges in both market and regulatory aspects. These challenges demand a collective response from the entire industry, requiring deeper conversations and broader cooperation. Therefore, I look forward to GTNF taking on the mission, constructing a platform for these crucial interactions. In my view, this is also where the greatest significance of GTNF lies.

In the future, 2FIRSTS will continue to report on the most important events in the global e-cigarette industry, maintaining a keen focus on the sector, conversing with key individuals, and driving the global e-cigarette industry towards high-quality development.

In reflection and anticipation,

A handwritten signature in black ink, reading "Yuna. Hou". The signature is fluid and cursive, with a large initial 'Y' and a stylized 'H'.

Yuna Hou  
Global Vice President and Global Chief Editor,  
2FIRSTS

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05 Brian King: FDA Plans to Adapt  
and Regulate Innovative  
E-Cigarette Products

06 Brian King: Strategy to Foster  
Healthier Choices in Tobacco  
Realm

09 Brian King: Submitting PMTA is No  
Equivalent to Legal Sale

12 Tom Beaudet: Challenges and  
Prospects in Preparing and  
Submitting FDA Applications

14 Panel: Growing Competition in  
Harm Reduction Products

16 Fiona Patten: Exploring Tobacco  
Harm Reduction

18 Nancy Loucas: Policies in New  
Zealand and Australia

20 Panel: How East Asia Set  
Standards in Tobacco Control

23 Julian Cheung (JTI):  
Addressing Illicit Trade in  
Cigarettes

24 Panel: Sustainable Development  
and New Vape Products

27 Jonathan Atwood: BAT's Vision  
for Smoke-Free Future

28 Eve Wang: Smoore Proposes  
Innovations in Vapour Efficiency  
to Tackle Industry Challenges

31 Fadi Maayta: Breaking the  
traditional distribution mold

33 Liem Khe Fung: Developing  
Eco-Friendly Filters to Address  
Environmental Concerns

35 Elise Rasmussen: Transform  
Industry Through Unique  
Dialogues

38 Joe Sakr: Taking Nicotine Pouches  
to Global Market



## Brian King

The Director of the Food and Drug  
Administration's Center for Tobacco  
Products

# Brian King: FDA Plans to Adapt and Regulate Innovative E-Cigarette Products

**FDA plans to adapt and regulate innovative e-cigarette products to aid adult smokers in quitting.**

On the afternoon of September 21, following the conclusion of the forum titled "Everyone's Responsibility: Protecting Minors from Tobacco Use" at the GTNF, 2FIRSTS posed a question to Brian King, the Director of the Center for Tobacco Products at the US Food and Drug Administration (FDA): With the rapid development of harm reduction products such as pod-based systems, disposable devices, and open systems, how does the FDA plan to adapt to this evolving category landscape and improve the predictability of regulations?

Brian King states that previous generations of nicotine products have not been effective in helping adults quit smoking. In recent years, there have been many innovative e-cigarette products that have been helpful in assisting adult smokers to quit. The FDA shows strong support for this innovation and will strive to adapt to these changes to promote the entry of innovative e-cigarette products into the US market.



Scan the QR Code to read the article

# Brian King: Strategy to Foster Healthier Choices in Tobacco Realm

**FDA CTP Director Brian King shed light on approaches to nurture healthier consumer choices and instigate industry innovation at GTNF 2023.**

The director of the U.S. Food and Drug Administration's Center for Tobacco Products, Brian King, shed light on a progressive three-pronged approach at the Global Tobacco & Nicotine Forum (GTNF) 2023, to nurture healthier consumer choices and instigate industry innovation concerning Reduced-Risk Products (RRPs) and traditional tobacco products.

## • Promoting Safer Alternatives and Age Restrictions

King underscored the importance of steering consumers away from riskier habits towards safer RRP through behavioral support programs.

The economic toll of smoking is hefty, costing the U.S. over \$240 billion in healthcare spending and \$185 billion in lost productivity in 2018. Moreover, a 2022 survey revealed a worrying 9.4% e-cigarette usage rate among middle and high school students, topping the list of tobacco products used by this demographic. To combat youth initiation issues, he stressed the implementation of strict age restrictions on device and product usage.

To curb youth access to harmful products, the FDA issued warnings against flavored, disposable vapes, and carried out nationwide inspection blitzes

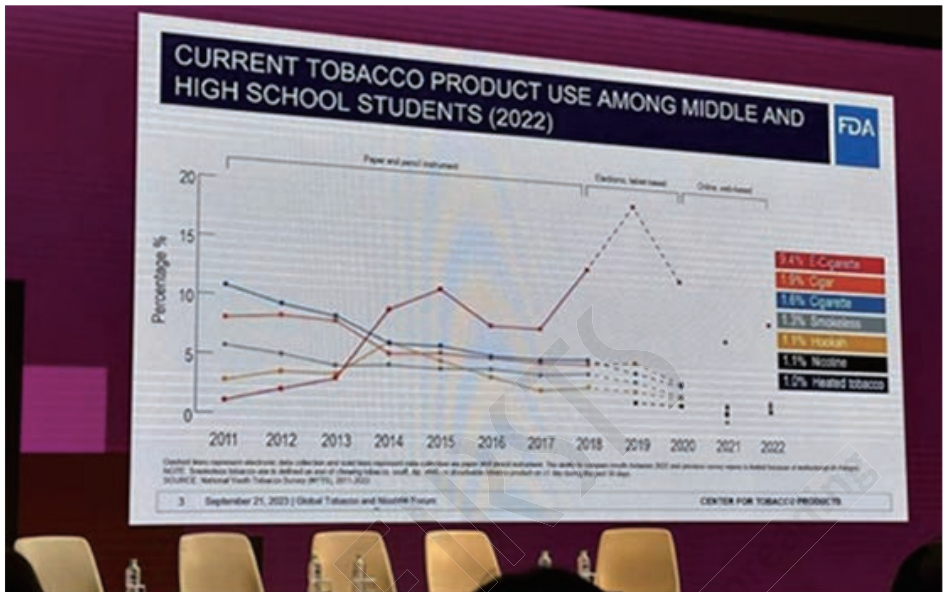
of retailers and distributors. As of August 11, 2023, over 1200 warning letters were dispatched through online investigations for various tobacco product violations, underlining the FDA's ongoing commitment to enforcing compliance and promoting public education on the matter.

## • Differentiating RRP from Conventional Tobacco Products

A clear-cut regulatory differentiation between RRP and conventional tobacco products is essential, opined King. Citing Greece's varied regulatory stringency on labeling, advertising, and packaging as an example, King highlighted how such measures aid consumers in making informed decisions based on associated risks.

He also touched on the evolutionary phases of the tobacco and nicotine product industry in the U.S., ranging from the highly concentrated pre-2006 era to the recent developments post





Brian King gave keynote speech at GTNF 2023 | 2firsts



A 2022 survey revealed a worrying 9.4% e-cigarette usage rate among middle and high school students | 2firsts



99% of these applications have been acted upon by FDA, authorizing 23 e-cigarette products | 2firsts

the rise of e-cigarettes around 2018, leading to a landscape ripe for innovative nicotine delivery products.

### • Constructive Policy Stance Including Regulatory and Fiscal Measures

The proposal also involved leveraging both regulatory and fiscal measures to spur industry innovation towards potentially less harmful products. King drew parallels with other industries like the fuel market and beverage industry, illustrating how product specification requirements could catalyze innovation and economic benefits while facilitating societal gains.

With eternal evaluation actions encompassing a gamut of strategies from science and application review to compliance and public education campaigns, the FDA's outlined approach at GTNF 2023 signals a constructive pathway towards aligning consumer, industry, and societal interests in the face of the evolving global tobacco market.



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# Brian King: Submitting PMTA is No Equivalent to Legal Sale

Brian King, Director of the FDA Center for Tobacco, discussed e-cigarette compliance and tracking systems at the GTNF.

On the afternoon of September 21st, at the 2023 Global Tobacco and Nicotine Forum (GTNF), Brian King, Director of the Tobacco Center at the U.S. Food and Drug Administration (FDA), was interviewed by 2FIRSTS. During the interview, he shared his views on compliance issues regarding e-cigarettes, tracking and tracing systems, and innovative products. Brian emphasized that submitting a premarket tobacco product application (PMTA) does not automatically mean legal sales, and he did not rule out the possibility of establishing a tracking and tracing system.

## • Submitting PMTA does not Equate to Legal Sale

The current abundance of illegal e-cigarette products is impeding the healthy development of the e-cigarette market in the United States. The improvement of legality and regulatory measures is becoming a crucial issue that the FDA must consider.

In response, Brian told 2FIRSTS that manufacturers from all over the world are illegally exporting products to the United States. While many people abide by US laws, there are also many who do not. Therefore, he emphasized the legal framework in the United States, particularly the procedures for authorizing tobacco products, to ensure that only products that have undergone scientific review and obtained US authorization can legally enter the market.



Brian King

*I certainly welcome the manufacturers' innovation in developing new products, but it is also important that we adhere to necessary procedures, conduct scientific research, and submit legal applications. Only after the products have been authorized can they legally enter the market, ensuring their legitimacy.*

Currently, many brands or products are taking advantage of the PMTA review gap to submit applications. The FDA has neither acknowledged nor rejected these applications, indicating that these products do not fall under the category of truly illegal products. Many companies are using this window to sell their products, with the ultimate goal not being to obtain PMTA approval for legal sales. Is this a regulatory loophole for the FDA?

In response, Brian made it clear to 2FIRSTS that submitting an application for approval does not equate to legal sales, as only authorized products can be legally sold. Currently, the FDA has authorized 23 e-cigarette products, and any other products not authorized fall within the realm of illegal sales.



Brian King

*We have 23 authorized products and any other sales without authorization are illegal.*

Brian believes that some companies assume they can obtain a "golden pass" by simply submitting an application. "This is incorrect; unless you are authorized, you will face enforcement risks, and the FDA can take action based on the situation.

### • Possibility of Establishing Tracking and Tracing System

The 2FIRSTS organization has discussed the newly implemented Tobacco Product Manufacturing Practices (TPMP) regulations with the FDA. Through recent enforcement actions, the FDA has collaborated with customs and other departments to crack down on illegal e-cigarette products. This raises the question of whether the FDA will enhance product tracing and monitoring.

Brian stated that although TPMP currently does not include tracking and tracing, it is laying the groundwork for potential tracking and tracing systems. This will aid in monitoring products entering the market to support law enforcement, but a tracking and tracing system has not been actively implemented at this time. review and obtained US authorization can legally enter the market.



Brian King

*The implementation of such rules and guidelines must go through a transparent rule-making process, hence TPMP will lay the foundation for some components of potential tracking and tracing systems. However, we are not actively implementing tracking and tracing at the moment. Nonetheless, considering the perspective of monitoring products entering the market, this is meaningful.*

However, Brian does not rule out the possibility of the FDA establishing a tracking and tracing system. "The Center for Tobacco Products (CTP) has been established for 13 years, implementing regulations including the TPMP rule, upon which we can further develop. This may include a future tracking and tracing system," he said.

### • Demonstrate Scientific Feasibility of Product

Finally, Brian emphasized to 2FIRSTS his welcoming attitude towards e-cigarette innovation and stated that as long as a product demonstrates scientific feasibility, it has a possibility of receiving authorization for sale in the United States. He encouraged manufacturers to follow proper legal procedures, including submitting pre-market tobacco product applications, and emphasized the FDA's commitment to expedite the review process for these applications.



Brian King

*People must follow the necessary procedures and conduct thorough scientific research to support their applications. The FDA is committed to reviewing these applications as quickly as possible and granting them qualification based on scientific performance.*



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## Tom Beaudet

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CEO of Accorto  
Regulatory Solutions

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### Tom Beaudet: Challenges and Prospects in Preparing and Submitting FDA Applications

**Tom Beaudet, CEO of Accorto Regulatory Solutions, specializing in preparing and submitting FDA applications, opened up about the challenges and prospects surrounding the PMTA, especially for flavored products.**

In an exclusive interview with 2FIRSTS at the GTNF forum in Seoul, Tom Beaudet, CEO of Accorto Regulatory Solutions, a regulatory consulting company specializing in preparing and submitting FDA applications, opened up about the challenges and prospects surrounding the PMTA (Premarket Tobacco Product Applications) process, especially for flavored products.

Representing Accorto Regulatory Solutions, a firm that has been pivotal in helping small

to medium-sized businesses bring FDA-regulated products to the market, Beaudet highlighted their extensive work in tobacco nicotine products, medical devices, and other pharmaceutical product sectors.

Beginning their engagement with the PMTA process in 2018, Accorto Regulatory Solutions prepared for the inaugural round of PMTA applications in 2020. "We've submitted applications on behalf of 10 different firms, many from Shenzhen, and all are still under

FDA review. Subsequently, we've represented approximately 15 more companies, with over 1,000 product applications awaiting final review," Beaudet said.

Addressing the primary challenges e-cigarette companies face during the PMTA application process, Beaudet stated the foremost obstacle is obtaining approval for flavored products.

*"Brian King clarified in his speech this afternoon that the FDA hasn't banned flavors. They are awaiting scientific data that demonstrates the efficacy of flavored products for adult smokers over tobacco and that this demand outweighs the risks to underage users,"* he explained.

Having recently completed the initial round of queue studies, Beaudet confidently stated, *"The scientific data clearly indicates that adult smokers can effectively reduce or quit smoking with flavored e-cigarettes, an outcome not seen with tobacco-flavored ones."*

Additionally, collaboration is underway with a company boasting a technology for disposable devices that restricts access to minors. Beaudet believes the chances of market approval

are high, provided they present long-term cooperative research applications integrating these innovations.

However, Beaudet expressed concerns about firms seeking PMTA to momentarily dodge FDA oversight and advocated for a more long-term vision. Detailing the two-phase approach to PMTA, he noted the three-month initial phase that culminates in an approval letter and PMTA code from the FDA. The subsequent phase revolves around comprehensive scientific research, data submission, and eventual FDA product review.

Reiterating Dr. King's sentiments, Beaudet emphasized, *"The FDA acknowledges e-cigarette products are safer than smoking. The challenge remains with flavored products, and companies are expected to furnish relevant scientific data to support their efficacy for adult smokers."*

Concluding the discussion, Beaudet expressed optimism, *"The FDA's willingness to approve flavored products is encouraging. However, thorough scientific research is crucial."* He is looking forward to providing the FDA with such evidence.

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**Sinclair Davidson**  
Economist and Author



**Paul Blair**  
Regional Director of  
External Affairs for PMI



**Anna Choi**  
assistant professor in the  
Department of Public  
Administration for  
Sejong University

## Panel: Growing Competition in Harm Reduction Products

On the morning of September 21st, during the third day of the GTNF Forum, guests discussed the research of harm reduction products, predicting intensified competition in the future.



On-site | 2firsts

On the morning of September 21, during the third day of the GTNF Forum, participants engaged in discussions surrounding "Reducing Harm to the Economy: Theory and Practice." By presenting data, they demonstrated the current global status of harm reduction products. The conclusion drawn was that in the future, competition among various types of harm reduction products will intensify.

The forum was hosted by Sinclair Davidson, a renowned writer and economist. The distinguished panel of speakers included Paul Blair, the Regional Director of External Affairs at PMI International; Anna Choi, an Assistant Professor in the Department of Public Administration at Sejong University; James Lambert, the Director of Asian Economic Consultancy at the Oxford Economics Research Institute; David Levy, a professor of oncology at Georgetown University; and Tim Phillips, the Managing Director of Tamarind Intelligence.



The guests showcased the distribution of new tobacco products worldwide through data. The usage rate of reduced-risk products has been steadily increasing, with a compound annual growth rate of 69% for nicotine pouches and 32% for heat-not-burn products in the North American market from 2019 to 2023. The market size for e-cigarettes in the region has grown at a compound annual growth rate of 11%. In Europe, the Middle East, and Africa, the compound annual growth rate for nicotine pouches is 41%, while it is 21% for heat-not-burn products and 7% for e-cigarettes. In the Asia-Pacific region, the compound annual growth rate for heat-not-burn products market size is 7%.

According to data, the top eight countries in terms of sales for heated tobacco and e-cigarettes in 2022 are the United States, Canada, Russia, the United Kingdom, Germany, Italy, Japan, and South Korea.

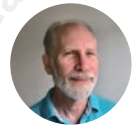
The attending guests expressed that the current positioning of e-cigarette companies in the United States is unclear due to the FDA's PMTA approval process. The only e-cigarette company without a tobacco background that has obtained PMTA approval is NJOY, which recently was acquired by Altria. Currently, it seems that no other independent e-cigarette company without a tobacco background has been able to pass PMTA. In the HNB field, PMI appears to be prepared to enter the US market, while Altria and JTI are collaborating to enter the US market, indicating the presence of competition in this sector. A similar situation has arisen in the nicotine pouch market, as ZYN and On are competing against each other.

Furthermore, in South Korea, the smoking rate among men is as high as 35%. Currently, 85% of those using ENDS are smokers, 12% used to be smokers, and 3% have never smoked before. However, the government's attitude towards harm reduction alternatives is extremely negative. They frequently promote the idea that harm reduction cannot help with smoking cessation, which also influences consumers' choices. This highlights the significant impact the government's attitude towards harm reduction products has on the future of these products.



**James Lambert**

Director for Economic  
Consulting in Asia for  
Oxford Economics



**David Levy**

Professor of Oncology for  
Georgetown University



**Tim Phillips**

Managing Director for  
Tamarind Intelligence



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## Fiona Patten

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Reason Party Leader and  
Former Member of the  
Legislative Council of Victoria

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### Fiona Patten: Exploring Tobacco Harm Reduction

The first discussion of the 2023 GTNF, "The Consumer is King," was held in Seoul, Korea, with industry professionals discussing tobacco harm reduction policies.

The first discussion of the GTNF 2023, titled "The Consumer is King," took place at the Conrad Hotel in Seoul, South Korea on the afternoon of September 19th. Five tobacco industry professionals, including Samrat Chowdhery, Clarisse Virgino, Alex Clark, Fiona Patten, and Matthew Drodge, engaged in a debate on the topic. Among them, Fiona Patten from Australia expressed the belief that the Australian government has not effectively implemented tobacco harm reduction (THR).

Patten served as a member of the Victorian Parliament in Australia from 2014 to 2022, focusing on social reforms including medicinal marijuana, reducing drug harm (including tobacco), criminal justice reform, and the separation of church and state. After leaving Parliament, Patten has been actively involved

in advocating for reducing tobacco harm, but she has expressed disappointment in the practices of her own country.

During the discussion, Patten, who is in Australia, participated via video conferencing. In the presence of guests and audience members, she candidly expressed her concerns about the flaws in the tobacco harm reduction policies currently implemented by the Australian government. This has resulted in 99% of Australians resorting to the illegal market to purchase e-cigarettes.

The existing policy on e-cigarettes in Australia has previously been discussed at the GFN forum.

Dr. Carolyn Beaumont, a general practitioner from Australia and founder of MedicalNicotine,

delivered a speech at the Global Nicotine Forum (GNF) in June 2023, discussing the consequences of Australia's ban on over-the-counter e-cigarettes.

Beaumont claims that Australia has not been successful in completely banning the use of non-prescription e-cigarettes, even after introducing a prescription e-cigarette system.

She estimates that illegal e-cigarettes make up 80% of all e-cigarette usage, with nearly 100% being used by young people. Beaumont, along with other scholars, elaborated on the regulatory failures with e-cigarettes in Australia, implying the need for more effective measures to address this issue.

The Australian government is set to tighten its policies on e-cigarettes starting in 2023. In May, the Minister for Health, Mark Butler, announced that the government will prohibit the import of non-prescription e-cigarette products. Additionally, they will establish minimum quality standards, which will include restrictions on e-cigarette flavors, packaging colors, and other ingredients. The packaging will have to resemble that of pharmaceutical products, with reduced nicotine concentration and capacity. Disposable e-cigarettes will also be explicitly banned.

In September, Butler announced plans to introduce stricter regulations to combat tobacco and e-cigarette use. He emphasized that tobacco control legislation is the "key" next step in the fight against tobacco and nicotine addiction, with the aim of reducing the national smoking rate to 5% by 2030. In order to eliminate e-cigarette use, advertising for e-cigarettes will be subject to restrictions.

Australia's stringent government regulation on e-cigarettes has failed to curb rampant e-cigarette smuggling, as law enforcement authorities in Australia have continuously seized illegal e-cigarettes in the past six months.

On June 28th, authorities in Western Australia seized a total of 17,000 e-cigarettes worth AUD 1 million. A month later, on July 27th, Victoria Police conducted a surprise inspection at a business on Swanson Street and confiscated over 25,000 nicotine e-cigarette liquids and 2,500 packs of illegal tobacco cigarettes. The authorities estimated the value of these items to be around AUD 800,000. On August 14th, the Department of Health in Western Australia seized a staggering 30,000 e-cigarettes weighing 15 tons, with an estimated value of AUD 10 million. Additionally, they also seized over 10 tons of pods. This marked the largest-ever single seizure of e-cigarettes in the state and nationwide. On September 5th, more than 150 law enforcement officers in Queensland seized over AUD 835,000 in cash, over 8 million cigarette sticks, and approximately 3.74 tons of loose tobacco leaves worth over AUD 14 million. They also confiscated 60,000 e-cigarettes worth around AUD 1.8 million.

Patten disagrees with the current e-cigarette policy of the Australian government. She believes that this is affecting the harm reduction potential of e-cigarettes, and now, "organized crime is the only way for e-cigarettes to operate in Australia".

Patten urges consumers to take action, stating, "As consumers, we should let the government know about this in order to promote policy advancement.



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## Nancy Loucas

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Coordinator of Public  
Health Policy and  
Enforcement at CAPHRA

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### Nancy Loucas: Policies in New Zealand and Australia

**Nancy Loucas, the Coordinator of Public Health Policy and Enforcement at CAPHRA, discussed tobacco and e-cigarette regulations at the GTNF.**

On September 20th, 2023, the Global Tobacco and Nicotine Forum (GTNF) entered its second day, and 2FIRSTS engaged in a conversation with Nancy Loucas, the Public Health Policy and Executive Coordinator for CAPHRA from New Zealand. Nancy provided an overview of tobacco and e-cigarette regulations in New Zealand and Australia, highlighting the differences in their approaches to issues such as youth smoking rates, new legislation, and the handling of black market tobacco.

Firstly, Nancy evaluates the latest tobacco and e-cigarette regulations proposed by the New Zealand government, describing them as an attempt to reduce smoking rates in a more innovative and progressive way. The new regulations focus on protecting children, but the actual issues lie more in the enforcement of laws rather than the e-cigarette products themselves. She emphasizes that the core problem is not the e-cigarettes themselves, but rather how to better enforce existing laws.

New Zealand has recently implemented the "Generational End Game" policy, aimed at reducing smoking rates in the long term. However, there seems to be an overlap with the new legislation in place. Nancy argues that considering New Zealand's current low rates of teenage smoking, these new regulations might be excessive. Nonetheless, she believes that such legislation appears appealing and could have a positive impact.

In addition, Nancy pointed out that there are obvious differences in e-cigarette policies between Australia and New Zealand. Compared to Australia's conservative approach, New Zealand demonstrates a more open and progressive strategy. Interestingly, despite implementing a stricter medical model, Australia's smoking rates have remained

stagnant or even risen, while New Zealand has successfully reduced smoking rates. This to some extent reflects the effectiveness of the policies implemented.

During the final stage of the conversation, Nancy criticized Australia's prescription model for e-cigarettes. This model treats regular consumers as patients or addicts, with doctors urging them to quit smoking, which ordinary consumers are often reluctant to accept. She also proposed that, in certain circumstances, people should be allowed to obtain e-cigarettes through medical means, especially for groups with a high demand for e-cigarettes, such as patients receiving treatment in mental health institutions. Policymakers should fully consider these special circumstances.

For reference only No commercial speech

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**David Bertram**

EUK Consulting Director



**Adam Afriyie**

Member of UK  
Parliament for Windsor



**Ming Deng**

Yunnan University Head  
of NGP Industry Study

## Panel: How East Asia Set Standards in Tobacco Control

At the GTNF forum on September 20th, participants discussed international perspectives on e-cigarette regulations.



On-site | Source: 2firsts

On the morning of September 20, at the GTNF forum, guests engaged in an in-depth exchange on the topic of "Regulation: International Perspectives," discussing their respective countries' e-cigarette regulatory policies.

The discussion was hosted by David Bertram, EUK Consulting Director, and attended by Adam Afriyie, Member of Parliament for Windsor, Dr. Deng Ming, Head of NGPs Industrial Research at Yunnan University, Dave Dobbins, former Chief Operating Officer of the Heritage Foundation/Truth Initiative, Marina Foltea, International Trade Law expert and Founder/Managing Director of Trade Pacts Consulting, and Kezia Purick, Member of the Legislative Assembly for the Northern Territory of Australia.

Adam Afriyie expressed disappointment and concern over the significant increase in the smoking rate among British teenagers, rising from 6% to 13%. This is not the desired direction of development and goes against the guidelines promoted by the World Health Organization (WHO). While the

UK has made progress in harm reduction products, there is still work to be done. Afriyie emphasized the alarming appeal of e-cigarettes and cigarettes to underage individuals and stressed the importance of regulating their use. Rather than solely relying on bans, he suggested informing and educating young people based on scientific facts and data.

Dr. Deng Ming stated that regulatory policies in the Asian region are diverse, but China, Japan, and South Korea have set good examples in tobacco control measures. He provided examples, such as these countries establishing designated smoking areas and providing smoking alternatives for those trying to quit. In South Korea, violations of smoking regulations result in fines imposed by the police, highlighting the importance of enforcement efforts.

Kezia Purick has pointed out that smoking has been a major health hazard in Australia over the past decade, similar to alcohol consumption. Australia has implemented strict regulatory policies and banned cigarette advertisements. In fact, cigarette production has not been seen in Australia since 1976. Regulations require health warning labels on the packaging of tobacco products, which should be present on every pack. In Australia, smokers interested in using e-cigarettes, as well as flavored ones such as candy, must obtain a prescription from a doctor, in order to prevent attracting minors. The country also has smoking cessation organizations that help individuals quit smoking, and these organizations have successfully assisted numerous smokers in their journey to quit.



### Dave Dobbins


American Legacy  
Foundation/The Truth  
Initiative Former Chief  
Operating Officer



### Kezia Purick

Member of the Northern  
Territory Legislative  
Assembly (Goyder) in the  
Australian Parliament  
(Independent)



A professional portrait of Julian Cheung, a woman with dark, wavy hair, wearing a dark blue blazer with white piping over a white top. She is seated and looking directly at the camera. A semi-transparent orange box is overlaid on the bottom left of the image, containing her name and title.

## Julian Cheung

JTI Anti-Illicit Trade Operations Director  
for the Asia-Pacific Region



# Julian Cheung (JTI): Addressing Illicit Trade in Cigarettes

JTI Asia Pacific's Julian Cheung highlights the global concern of illegal tobacco trade, with a \$40 trillion industry in 2022.

On September 21st, the final day of the GTNF forum, Julian Cheung, the Regional Director of Anti-Illicit Trade for JTI Asia Pacific, delivered a speech in the morning. Cheung expressed that the issue of illicit cigarettes (referring to counterfeit and contraband cigarettes) is not an isolated problem but rather a result of larger criminal backgrounds and criminal ecosystems. Many consumers are unable to determine whether the cigarettes they purchase are counterfeit or illegally imported genuine products.

Julian Cheung introduces the illegal tobacco trade, which typically sees cigarettes being smuggled from low-consumption countries to high-consumption countries. Due to this illicit trade, governments suffer an annual loss of approximately \$40-50 billion in tobacco tax revenue. This criminal activity is carried

out across borders, thus urging the need for multinational law enforcement efforts to combat illegal cigarette smuggling. The COVID-19 pandemic has further exacerbated the issue as illegal cigarette trade has shifted online, making it even more difficult to control. In 2022, the value of illegal cigarette trade reached a staggering \$40 trillion, with counterfeit cigarettes accounting for 33.9% of the global total. Smugglers play a vital role in facilitating cross-border illegal cigarette trade, with significant numbers found along the Thailand-Myanmar border, China-Vietnam border, and Malaysia-Indonesia border, helping transport and carry illicit cigarettes.

Julian Cheung pointed out that if cigarette prices increase by 10%, the scale of illegal trade on average grows by 7%.

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**Christopher Fleury**

Ipsos Senior Vice  
President of Regulatory  
Affairs Research



**Ana Krasojevic**

JTI Corporate  
Sustainability Strategy  
and Reporting Director



**Sudhanshu  
Patwardhan**

Healthtech Entrepreneur

## Panel: Sustainable Development and New Vape Products

At the GTNF forum on September 20th, experts discussed the future of e-cigarettes in terms of sustainability and innovation direction.



At the GTNF Forum, participants discussed "New product development direction" | 2firsts

On the afternoon of September 20th, participants at the GTNF forum engaged in discussions about the future of e-cigarettes, focusing on two main areas: "the path to sustainable development" and "directions for new product development."

During the first afternoon session themed "The Path to Sustainable Development," the panelists expressed the view that sustainable development is no longer just a corporate strategy, but also encompasses consumers, the environment, and even the entire supply chain.

The forum was hosted by Christopher Fleury, Senior Vice President of Regulatory Affairs Research at Ipsos, with panelists including Ana Krasojevic, Director of Sustainable Development Strategy and Reporting at Japan Tobacco International (JTI), Sudhanshu Patwardhan, HealthTech entrepreneur and Director of the Health Research and Education Center,

Diane Raverdy Lambert, Chief Scientist and Head of Regulatory Affairs at SWM, and Michiel Reerink, Director of International Affairs and Managing Director of Alliance One International GmbH at Alliance One International.

Multiple guests believe that implementing sustainable development strategies is beneficial for the tobacco market, both for buyers and sellers, as well as for the society as a whole. Collaborating with consumers is also crucial in order to create and produce environmentally friendly and recyclable products, thus embracing the path of sustainable development.

However, Michiel Reerink has expressed a different viewpoint on sustainability strategies. He mentioned that he recently visited the African country of Malawi and witnessed the actual situation of local tobacco farmers. He believes that sustainability is not only reflected in product production and consumers, but also involves other issues. For example, child labor and improving the income of tobacco farmers. These require joint efforts from companies throughout the supply chain. Only through the combined actions of each link can a sustainable development path be achieved.

At the second forum with the theme "Innovative Products for the Future," the guests exchanged their views on the development of new products in the tobacco industry. They believed that future products should move towards being less harmful, more intelligent, and environmentally friendly.

This forum was hosted by Eve Wang, the Executive Director of Smoore International and Vice President of Smoore. The panel discussion included participants such as Cui Tao, Director of Innovation, Strategy, and Compliance at Innokin Technology; James Kuang, Chief Scientist and Director of Life Science Research Institute at ICCPP; Fadi Maayta, President and Co-founder of ANDS; Cherry Pan, Sales Manager of the Eastern Division at Smiss Technology; and Ryan Selby, CEO of Generative AI Solutions and Executive Director of Modern Nicotine Company.

What is the future direction of the e-cigarette industry? Multiple guests have expressed that apart from harm reduction and intelligent recyclability, there should also be minimal impact on the surrounding people. Fadi Maayta, on the other hand, believes that AI will provide the answers regarding the future.

A question was posed by an e-liquid manufacturer on-site, inquiring if innovation is feasible in the realm of device manufacturers and brand holders. This is crucial as each progressive step in the e-cigarette industry's innovation has the potential to impact both the devices and e-liquids. When producing e-liquids, manufacturers are not only concerned with innovation, but also desire to witness compatible outcomes.



**Diane Raverdy-Lambert**

SWM Engineered  
Papers Division Chief  
Scientist and Director of  
Regulatory Affairs



**Michiel Reerink**

Michiel Reerink  
is Alliance One  
International's (AOI)  
international affairs  
director and managing  
director of Alliance One  
International GmbH

According to Fadi, firstly, many e-liquid manufacturers have become extremely aggressive in the belief that producing bubblegum flavors and all these radical flavors is an innovation that should be completely condemned and rejected. This is not innovation, but rather a disaster for the e-cigarette industry. Therefore, he believes that if these companies truly want to innovate and envision the future, they should focus more on directions beyond nicotine.

Smokers develop an addiction to cigarettes and then become dependent on nicotine found in better alternatives. Fadi believes that this transition should continue in order to move these users away from nicotine. Compared to combustible cigarettes, alternative nicotine delivery systems have the potential to significantly reduce potential harm, so investing in products beyond nicotine may be the future trend.

Ryan Selby believes that AI has a tremendous opportunity to assist in the e-cigarette industry. By inputting large amounts of data and identifying interactions between devices and e-liquids, there is potential to find opportunities for combining substances and devices in a way that reduces associated risks. Additionally, observing macro patterns can help understand how to shift users away from nicotine usage towards alternative directions.

Big data and AI have the ability to uncover hidden secrets that can help companies progress in the right direction.



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## Jonathan Atwood

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group head of business  
communications BAT

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### Jonathan Atwood: BAT's Vision for Smoke-Free Future

Seoul time, September 20th, 9:10 AM GTNF2023 Day 2 officially begins with a speech by BAT's group head of business communications, Jonathan Atwood.

The second day of the GTNF2023 schedule officially opened at 9:10am Seoul Time. Jonathan Atwood, the group head of business communications at BAT, delivered a speech on stage. According to the official GTNF schedule, the scheduled speaker for this session was originally Kingsley Wheaton, the Chief Strategy and Growth Officer at BAT. However, Jonathan Atwood took his place and highlighted that as the world's largest e-cigarette company, BAT aims to achieve a smoke-free goal by 2030.



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## Eve Wang

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Executive director of  
Smoore International and  
Vice-president of Smoore  
Holdings

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### Eve Wang: Smoore Proposes Innovations in Vapour Efficiency to Tackle Industry Challenges

On September 20th, at the 2023 Global Tobacco and Nicotine Forum (GTNF), Eve Wang, a representative from Chinese company Smoore, shared some insights on Smoore's views in the e-cigarette industry. She believes that through collective efforts and collaboration, a brighter and more sustainable future can be created for this industry.

Two years ago, at the GTNF Forum in 2021, a representative from Smoore company delivered a speech on the theme of "Vaping Making Life Better," highlighting Smoore's steadfast commitment to driving progress in the e-cigarette industry. Under the theme of "Changing the Conversation, Changing the Results" at the 2023 GTNF Forum, Eve showcased the current innovation landscape, challenges, and sought-after solutions in the e-cigarette industry. She believes that now is a critical stage for the industry, a stage full of

infinite possibilities and opportunities.

The industry has undergone a transition from a single product category to open system devices, and now faces the challenges and opportunities of diversification in the market. Eve also highlighted another important keyword: regulation. She emphasized the significant role regulatory bodies play in protecting consumers and promoting a healthy industry development, while also discussing how to address these challenges through innovation and collaboration.

According to Sullivan research data, there are over 60 million e-cigarette users worldwide. The global retail market for e-cigarettes was valued at \$28 billion in 2018 and has reached \$52.5 billion in 2022. It is predicted that by the end of 2027, the market size will exceed \$122 billion.



Eve Wang from Smoore shared insights at the 2023 GTNF, emphasizing the need for collaboration in creating a better future for the e-cigarette industry.

Eve states that, as the market grows, Smoore is also aware of the numerous challenges faced by the e-cigarette industry. Smoore is devoted to finding balanced solutions by improving vaporization efficiency, ensuring the industry's health and sustainable development.

For instance, the British e-cigarette market has come under scrutiny in recent months from various media outlets. In March, the Financial Times highlighted the environmental impact of disposable e-cigarette products. In May, The Guardian drew attention to the risk of fires caused by disposable products in waste management facilities. In the same month, the British Broadcasting Corporation (BBC)

called for stricter regulations, citing increasing statistics and the issue of youth usage. Furthermore, in June, Sky News published a report urging for a ban on disposable e-cigarette products due to their particularly strong appeal to teenagers.

Therefore, Eve believes that all practitioners need to take these issues and challenges seriously and seek more balanced solutions to ensure the health and sustainable development of the industry. She emphasizes that through joint efforts and collaboration, a better and sustainable future can be created for this industry.



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## Fadi Maayta

Co-founder and President for ANDS





ANDS's booth | Source: 2firsts

## Fadi Maayta: Breaking the traditional distribution mold

**Fadi Maayta, the CEO and Co-founder of ANDS, underlined how manufacturers should simplify pod system to meet consumer demands.**

At the GTNF forum on September 21st, an insightful conversation took place between 2FIRSTS and Fadi Maayta, the CEO and Co-founder of ANDS, one of the largest e-cigarette trademark owner channel distributor in the Middle East. In this deep dialogue, ANDS openly shared its expansion strategy in the global market and its future vision.

Breaking the traditional distribution mold, ANDS offers end-to-end services for its clients and suppliers. From brand registration,

packaging, marketing toolkits to digitized market routes, ANDS sees itself as a hybrid entity, blending the roles of a corporate entity with that of a distributor. For new companies aiming to penetrate the Middle Eastern or European markets, ANDS offers a turnkey solution, eliminating the need for clients to invest additional manpower and time.

A notable strength of ANDS is its significant presence in duty-free zones at airports across the Middle East and Europe. Beyond major

Middle Eastern airports, they have successfully made their mark in key European airports, including Germany, Austria, Manchester, and Heathrow, with further expansion on the horizon.

The company revealed its core market positioning is in modern trade, focusing on major supermarkets, petrol stations, and chain stores in Europe. Their intent is to appeal to traditional smokers, offering them better alternatives rather than competing within the saturated e-cigarette market.



ANDS honored with the "Golden Leaf Award 2023"  
| Source: 2firsts

Discussing the future of the e-cigarette market, ANDS anticipates a potential policy squeeze on disposable e-cigarettes due to evolving regulatory landscapes.

Pod systems, they believe, may make a resurgence. Emphasizing the accelerated innovation in the pod system sector, the company underlined how manufacturers are simplifying pod system use to meet consumer demands.

In a recent eco-friendly initiative, ANDS introduced recyclable disposable card board vapes in the UK and several EU nations. This move reflects the company's in a recent eco-friendly initiative, ANDS introduced recyclable disposable card board vapes in the UK and several EU nations. This move reflects the company's

In a recent eco-friendly initiative, ANDS introduced recyclable disposable card board vapes in the UK and several EU nations. This move reflects the company's in a recent eco-friendly initiative, ANDS introduced recyclable disposable card board vapes in the UK and several EU nations. This move reflects the company's commitment not only to market demands but also to reducing the environmental impact of e-cigarettes and underlining their care for human health.

Looking ahead, ANDS sets ambitious goals: aiming for a total revenue of close to \$500 million in the next three to five years, and targeting a 20% market share in all major business markets. They also plan to invest in the oral nicotine market, aiming to diversify their product line further.



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## Liem Khe Fung

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Bukit Muria Jaya (BMJ)'s  
Innovation Director

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### Liem Khe Fung: Developing Eco-Friendly Filters to Address Environmental Concerns

Chief Innovation Officer of Indonesia's leading tobacco paper production company, PT. Bukit Muria Jaya (BMJ), highlighted the growing demand for eco-friendly products in the tobacco industry.

In a candid interview with 2FIRSTS at the GTNF in Seoul, Liem Khe Fung, Chief Innovation Officer of Indonesia's leading tobacco paper production company, PT. Bukit Muria Jaya (BMJ), highlighted the growing demand for environmentally-friendly products in the tobacco industry. In response to this challenge, the company has embarked on the development of a new biodegradable paper filter.

The decision to venture into the paper filter business, Liem explained, primarily stems from their decades-long experience in tobacco paper manufacturing. Secondly, the firm's commitment to innovation is driven by an ambition to offer the tobacco industry an environmentally-conscious solution, especially given the high costs and tight supply associated with conventional acetate filters.

*"We are eager to innovate and address our customers' needs. Our goal is to assist clients in sustaining their cigarette production as it subsequently leads to purchasing our paper. Thus, our growth plans encompass both paper manufacturing and future filter production in cooperation with filter producers," Liem elaborated.*

When comparing between the filters used in e-cigarettes and traditional rolled cigarettes, Liem conceded that current paper filters on the market still can't rival the performance of conventional acetate filters. The latter isn't affected by moisture, whereas paper filters tend to absorb it, degrading their efficacy. However, PT. Bukit Muria Jaya (BMJ) is researching a cellulose-based material that remains biodegradable yet is non-absorbent to moisture, aiming to boost the paper filter's performance.

Addressing environmental concerns, Liem pointed out their innovative approach to mitigate the waste disposal issue of disposable filters. Traditional disposable filters, particularly acetate ones, pose environmental challenges due to their plastic nature, making them difficult to recycle and biodegrade. The company's innovations aim to ensure the filters excel not only in performance but also contribute positively to the environment.

While the growth of the e-cigarette market could potentially impact the conventional cigarette industry, Liem mentioned that its influence in the Indonesian market remains minimal. Indonesians have a distinct preference for traditional clove cigarettes, a taste not easily replicated by e-cigarettes. Nevertheless, the company is also strategizing to allocate some production towards papers suitable for food packaging, adapting to market shifts.

Liem emphasized that their Innovation team is relentlessly working to ensure their products are not only top-performing but also contribute positively to environmental sustainability. They are optimistic that their innovative paper filters will offer a viable solution in a market increasingly conscious of environmental issues, addressing the eco-challenges posed by disposable filters.



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## Elise Rasmussen

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Founder & Chief  
Director the GTNF

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## Elise Rasmussen: Transform Industry Through Unique Dialogues

Elise Rasmussen, the founder of GTNF, engaged in an exclusive interview with 2FIRSTS, where she shared her initial intentions behind establishing GTNF and its developmental journey

Recently, at the 2023 Global Tobacco and Nicotine Forum (GTNF), Elise Rasmussen, the founder of GTNF, engaged in an exclusive interview with 2FIRSTS, where she shared her initial intentions behind establishing GTNF, its developmental journey, and the impact it has had on the tobacco and nicotine industry.

Elise pointed out that this year, GTNF welcomed 34 first-time speakers, reflecting the forum's leading position in industry exchanges.

## • GTNF Welcomed 34 First-time Speakers



2FIRSTS

*Could you please share the initial purpose and development journey of GTNF, along with its impact on the tobacco and nicotine industry?*

*When I founded GTNF in Rio de Janeiro in 2008, we had three core objectives: to bring together individuals both from within and outside the industry, fostering networking and dialogue; to tackle the significant challenges that others were hesitant to address; and to curate a lineup of new and distinguished speakers that would captivate your interest. Since then, it has become the global exchange for views and ideas between public health experts, government representatives, the industry and investors.*



Elise Rasmussen



2FIRSTS

*What changes have occurred in GTNF compared to the previous year?*

*GTNF was founded to promote dialogue and shape the future together. We still do that, but instead travel the world to accomplish the same. Each year, the GTNF features a growing lineup of influential voices charting historic transformation - and aspire to offer more expert panels, more keynote speakers and more diverse viewpoints than ever before. This year, we are delighted to welcome 34 first time speakers, some of whom are addressing a nicotine-focused audience for the very first time. This reflects GTNF' s leading role in fostering discussions within this sector and serving as a global hub for the exchange of innovation.*



Elise Rasmussen

## • Discussions to Alter Industry Outcomes



2FIRSTS

*How has GTNF facilitated cross-disciplinary dialogues and collaborations, and what influence does it have on the future of the industry?*

*I always like to say that we are "first for firsts". We were the first industry conference to bring public health speakers together with the industry, which opened the door for dialogue between the two. This has brought enormous benefits to both the industry, but also I believe, public health experts and ultimately regulators as they get to hear new perspectives.*



Elise  
Rasmussen



2FIRSTS

*About this year's theme, "Change the Conversation, Change the Outcome," what changes tobacco and nicotine industry needs to make to achieve better results in the current environment? what influence does it have on the future of the industry?*

*I quoted Mad Men's Don Draper in my opening speech who famously said that "if you don't like what's being said, change the conversation". That's what we're doing this week; confronting the issues and raise the topics that many others won't. Our extensive programme features industry leaders, regulators, politicians from around the world, and public health experts who have come together with the shared goal of 'changing the conversation'. This provides a unique opportunity for connection, collaboration and open communication, ultimately allowing us to change outcomes within the industry.*



Elise  
Rasmussen



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Marketing and Sales Director, Joe Sakr, engaged in in-depth discussions with 2FIRSTS | 2firsts

## Joe Sakr: Taking Nicotine Pouches to Global Market

**Representatives from Badael engaged in in-depth discussions with 2firsts about the company's vision, background, and the future of reduced-harm tobacco in Saudi Arabia.**

In the recent 2023 Global Nicotine and Tobacco Forum (GTNF) held in Seoul, South Korea, which attracted international giants of the tobacco industry and several electronic cigarette companies, a notable presence was Badael, a nicotine pouch company hailing from Saudi Arabia. Representatives from Badael, including their Marketing and Sales Director,

Joe Sakr, engaged in in-depth discussions with 2FIRSTS about the company's vision, background, and the future of reduced-harm tobacco in Saudi Arabia.

Nicotine pouches, an emerging alternative to traditional tobacco products, allow users to obtain nicotine by placing a pouch under their



lips, eliminating the need for conventional tobacco consumption. The primary goal of these products is to assist smokers in quitting while offering a more convenient and discreet method of nicotine intake.

Launched in May 2023, Badael, meaning "alternatives" in Arabic, claims to be a wholly-owned subsidiary of Saudi Arabia's Public Investment Fund (PIF). Public Investment Fund (PIF) is Saudi Arabia's sovereign wealth fund, one of the largest in the world with estimated assets of \$776 billion, designed to make investments on behalf of the Saudi government and chaired by Crown Prince Mohammed bin Salman since 2015.

Joe Sakr shared insights into the stakeholders behind Badael, emphasizing their investment from the Public Investment Fund (PIF) to help contribute to Saudi Arabia's national vision of improving people's quality of life. The company's mission is to mitigate the harm caused by cigarette smoking and provide a healthier alternative.

Badael swiftly introduced its own brand of nicotine pouches, known as "DZRT," shortly after its establishment. The product was initially launched on their website [www.DZRT.com](http://www.DZRT.com) and is now available in retail stores. Sakr revealed that the response from consumers and retailers to DZRT nicotine pouches has been overwhelmingly positive. He reiterated the company's mission to transition smokers away from cigarettes to better alternatives, which aligns with the purpose of nicotine pouches.

One of the major challenges the company faces is the understanding of this new category so that these new nicotine products are considered a distinct product category rather than equating them with traditional cigarettes. Sakr stressed that this approach would provide more choices and enable smokers to access a better and more

convenient nicotine delivery system, thereby reducing their dependence on harmful cigarettes.

*"We would like to see all stakeholders better understanding this category, so that they view these products as novel products that can help in reducing the harm caused by cigarettes as not all nicotine delivery systems are created equal"* Sakr stated.

2FIRSTS questioned whether nicotine pouches could serve as the ultimate solution for nicotine products. Sakr responded by highlighting that traditional cigarettes could always have a presence. The World Health Organization defines a "smoke-free nation" as one with a smoking rate of less than 5%.

Sweden is expected to achieve this goal next year, but it does not mean that nobody would smoke within the country. According to Sakr, while nicotine pouches may not completely replace cigarettes, every cigarette replaced by a pouch is beneficial to public health.

Another topic of discussion was the regulation of nicotine pouches. Currently, in some countries, nicotine pouches are considered consumer products, such as in Canada.

However, more markets are starting to regulate them as they clearly contain nicotine.

Sakr expressed their support for reasonable regulations to ensure that nicotine pouches are not accessible to minors or non-smokers while maintaining sensible rules that allow those in need to understand and use these products.

*"We advocate for reasonable regulation of nicotine pouches as an alternative to cigarettes,"* he said.

Sakr also shared Badael's market plans. Currently, they only sell their products in Saudi Arabia, but they plan to gradually expand to



Only 3% of Swedish teenagers aged 16-29 smoke | Source: Swedish experience

neighboring countries. The company intends to export DZRT nicotine pouches to Gulf Cooperation Council (GCC) countries such as the United Arab Emirates, Kuwait, Bahrain, and further expand from the Middle East to the global market.

However, Saudi Arabia has no history of producing nicotine pouches. As a company primarily focused on nicotine pouches, how will Badael address the issue of sourcing materials locally? Sakr explained that they currently manufacture nicotine pouches and packaging in Saudi Arabia but import the mixture of nicotine from abroad. They plan to localize the production of the mixture in the near future, ensuring the entire supply chain is completed in-house.

The nicotine pouch product offers three different nicotine concentrations: 3mg, 6mg, and 10mg. Furthermore, Badael provides eight different flavors. Currently, the company

primarily imports the nicotine mixture from Sweden, but they plan to localize production in Saudi Arabia.

*"We aim to completely manufacture our products locally in Saudi Arabia,"* Sakr said.

Sakr emphasized that the convenience and discreet nature of nicotine pouches make them an attractive choice for smokers, especially in situations where smoking is prohibited, such as during air travel, train journeys, or in meeting rooms. He believes that smokers will gradually experience the positive effects of nicotine pouches and transition towards them, with some successfully quitting smoking altogether.

For more information about Badael and DZRT please visit [www.Badaelcompany.com](http://www.Badaelcompany.com) and [www.DZRT.com](http://www.DZRT.com)



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## About 2FIRSTS

2FIRSTS Technology Co., Ltd. is a leading global vaping industry media and consultancy founded in the wake of 2022.

2FIRSTS has soon become the essential source of information for practitioners of NGP supply chain in China after its inception, and then becomes the most active industry media globally, cooperating with major global vape expos and tobacco & nicotine forums.

Currently provides newswire and PR services for the world's most influential NGP companies.

Boasting 2firsts.cn (Chinese language) and 2firsts.com (English language) and 2firsts.com/es (Spanish language), 2FIRSTS welcomes over 10,000 daily visits.



This report is intended for professionals of the e-cigarette industry, minors are prohibited from reading this report.