



Illicit Cigarettes Study (ICS) In Malaysia, May 2023 Report

Report Commissioned by CMTM member companies

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Illegal Cigarettes Criteria For Verification

Packs with at least one (1) of the following features:

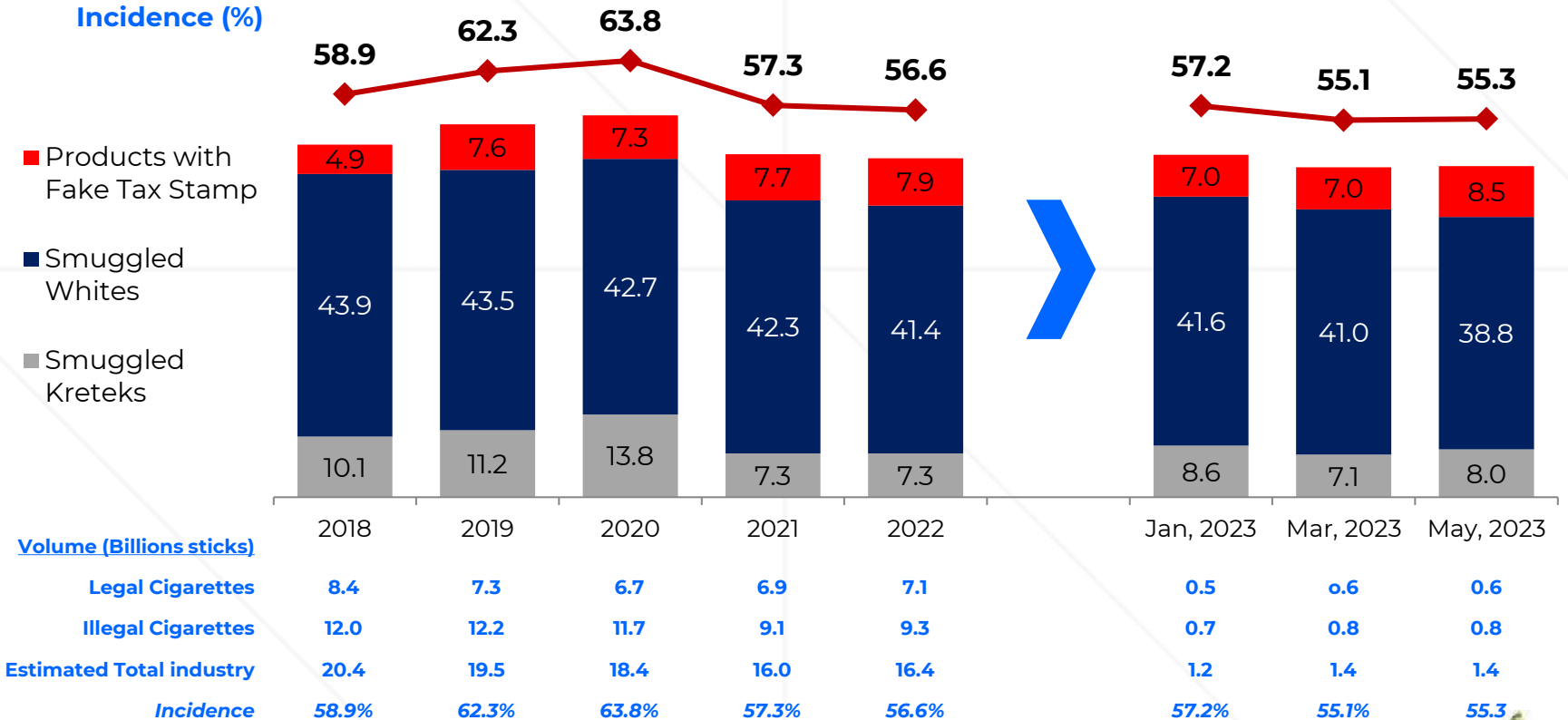
1. Absence of Registered Importers
2. Unregistered Importers*
3. Absence of Registered Manufacturers
4. Unregistered Manufacturers*
5. Packs with counterfeit (fake) Malaysian tax stamp**
6. Packs without Malaysian tax stamp
7. Packs with non-Malaysian tax stamp
8. Unregistered Brand*
9. Non Compliance to Ministry of Health's Control of Tobacco Product Regulations (CTPR) 2004
 - I. Absence or Non Compliance of Pictorial Health Warning Requirements
 - II. Pack Size other than 20 sticks
 - III. Absence or Non Compliance of mandated labeling requirements

* Not registered with the Royal Malaysian Customs

** Verified by Lembah Sari Sdn Bhd (LSSB) – Government appointed sole vendor for tax stamp

Illegal Cigarettes Incidence At National Level :

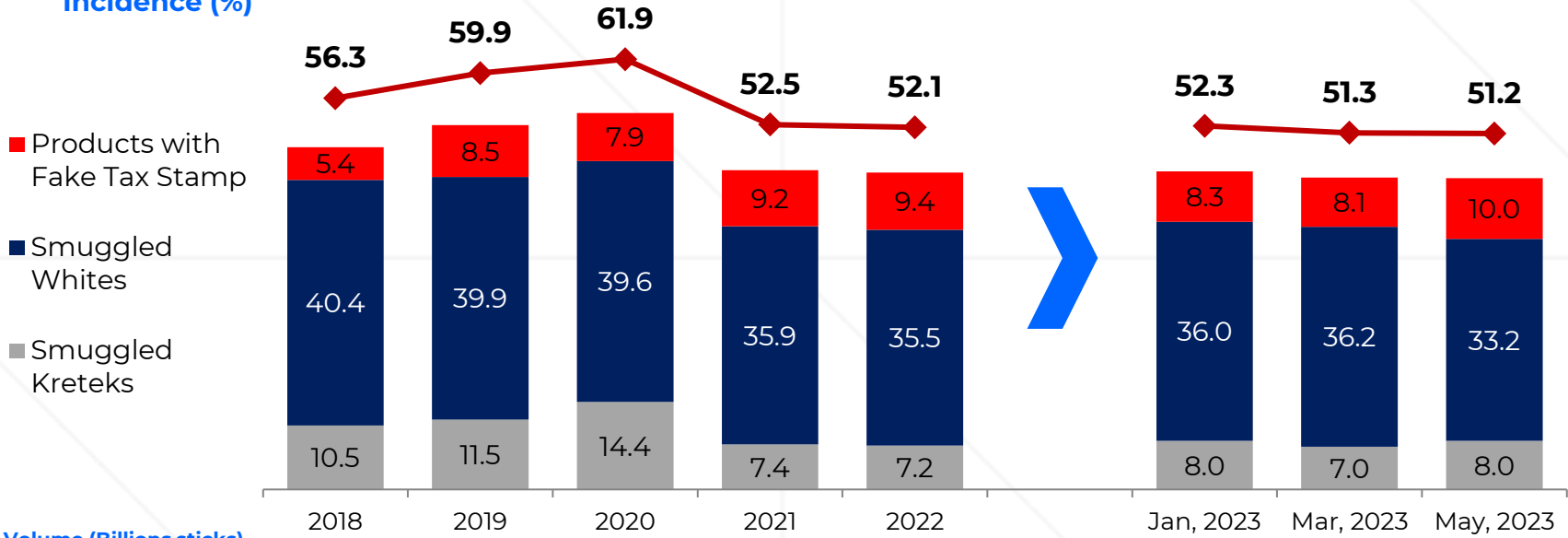
Overall increase by 0.2 ppt. vs. Mar, 2023



Illegal Cigarettes Incidence In Pen. Malaysia :

Overall decrease by 0.1 vs. Mar, 2023

Incidence (%)



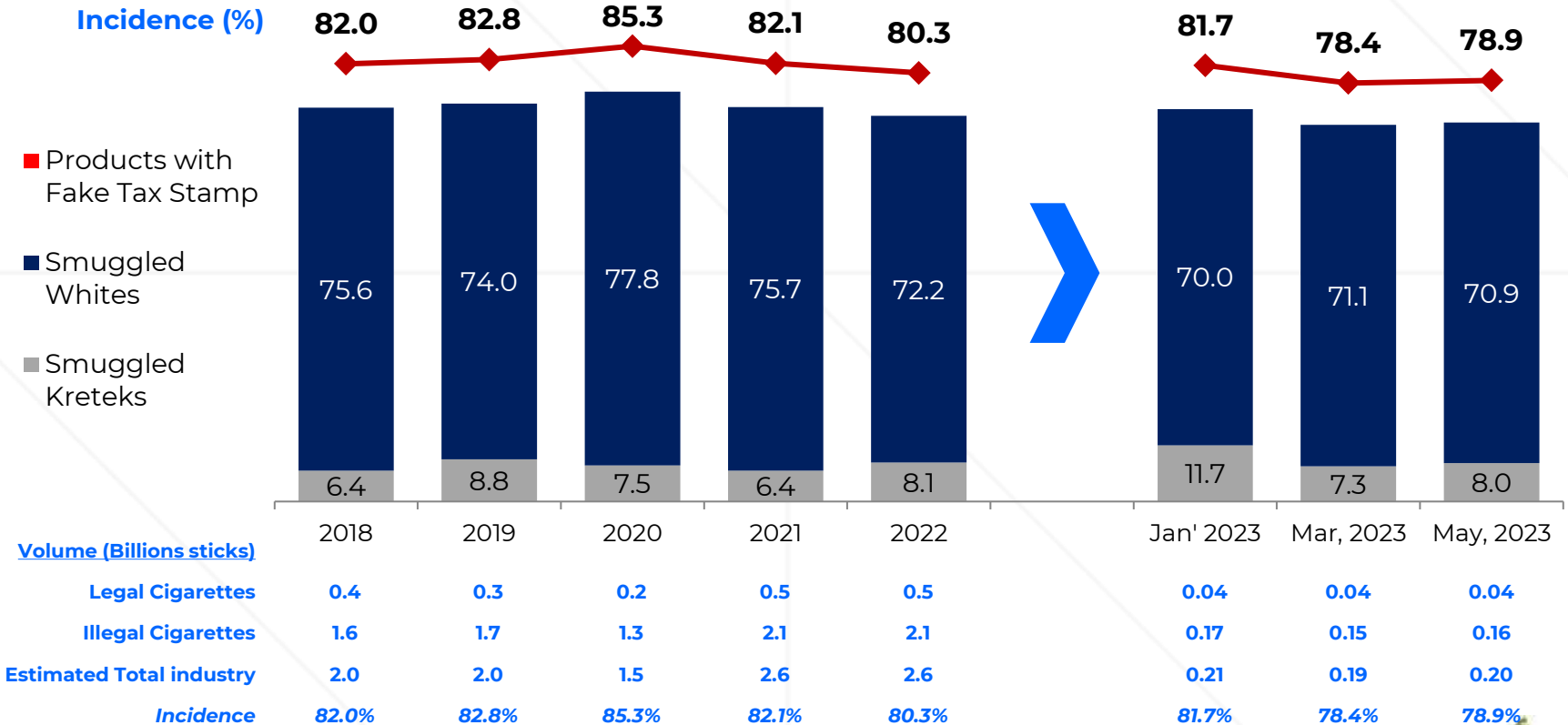
Volume (Billions sticks)

	2018	2019	2020	2021	2022	Jan, 2023	Mar, 2023	May, 2023
Legal Cigarettes	8.0	7.0	6.5	6.4	6.6	0.49	0.57	0.56
Illegal Cigarettes	10.4	10.5	10.4	7.0	7.2	0.54	0.60	0.59
Estimated Total industry	18.4	17.5	16.9	13.4	13.8	1.03	1.17	1.15
Incidence	56.3%	59.9%	61.9%	52.5%	52.1%	52.3%	51.3%	51.2%



Illegal Cigarettes Incidence In East Malaysia :

Overall increase by 0.5 vs. Mar, 2023



Top 10 Illegal Cigarettes Brands*

They account for approximately 79% of illegal cigarettes volume

		May, 2023	Mar, 2023	2022
		SOM	SOM	SOM
Illegal Brand		(%)	(%)	(%)
1.	John	13.5	14.5	15.4
2.	Era	7.2	7.1	7.7
3.	Canyon	6.2	7.3	5.2
4.	Gudang Garam	4.8	4.7	4.2
5.	U2	4.7	5.5	3.9
6.	L.A.	1.8	2.0	1.9
7.	Parkway	1.6	1.4	1.7
8.	Bosston*	1.4	1.2	1.4
9.	Misto*	1.4	1.1	1.9
10.	Rave	1.3	1.0	1.0
Top 10 Total		43.9	45.8	44.3

Other Illegal		11.4	9.3	12.3
Total Illegal %		55.3	55.1	56.6

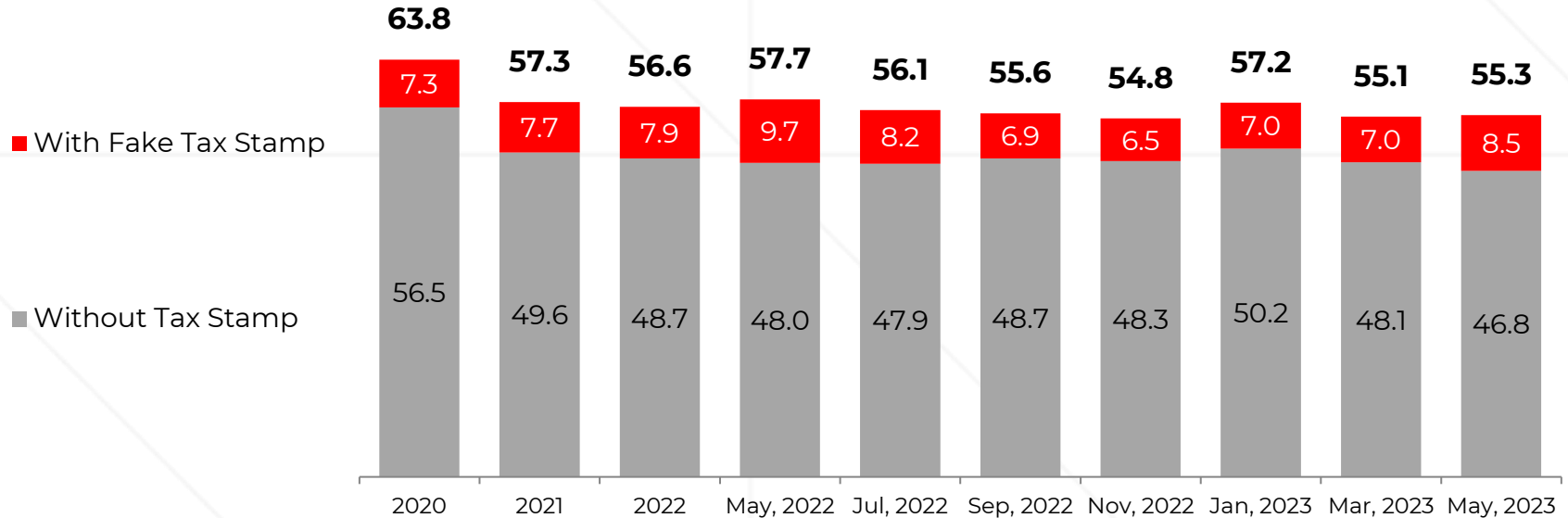


* relates to incidence of empty packs collected that meet any of illegal cigarettes criteria in page 3, regardless whether they are a legal brand or otherwise

Tax Stamp Breakdown Of Illegal Cigarettes :

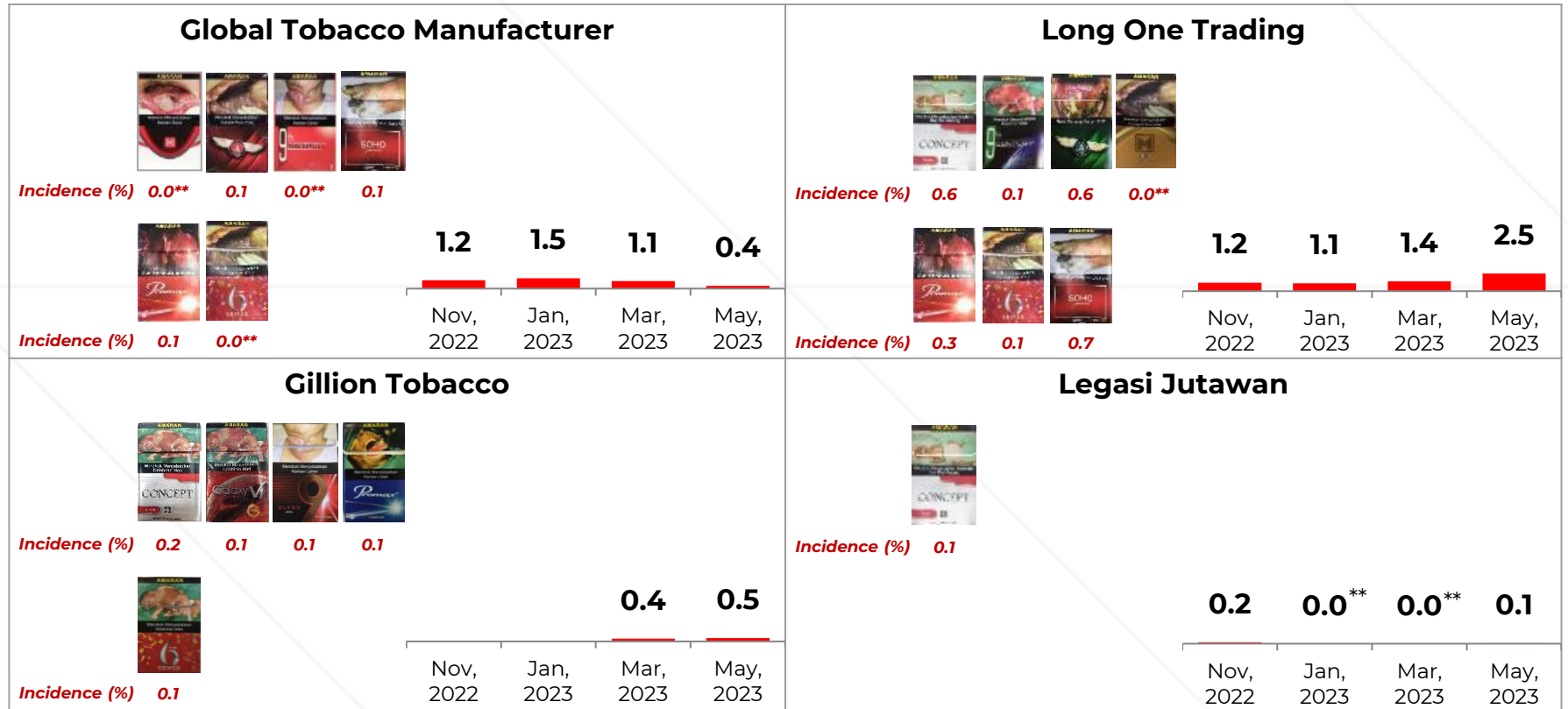
85% of illegal cigarettes are without tax stamps while remaining 15% are with fake tax stamps

Incidence (%)



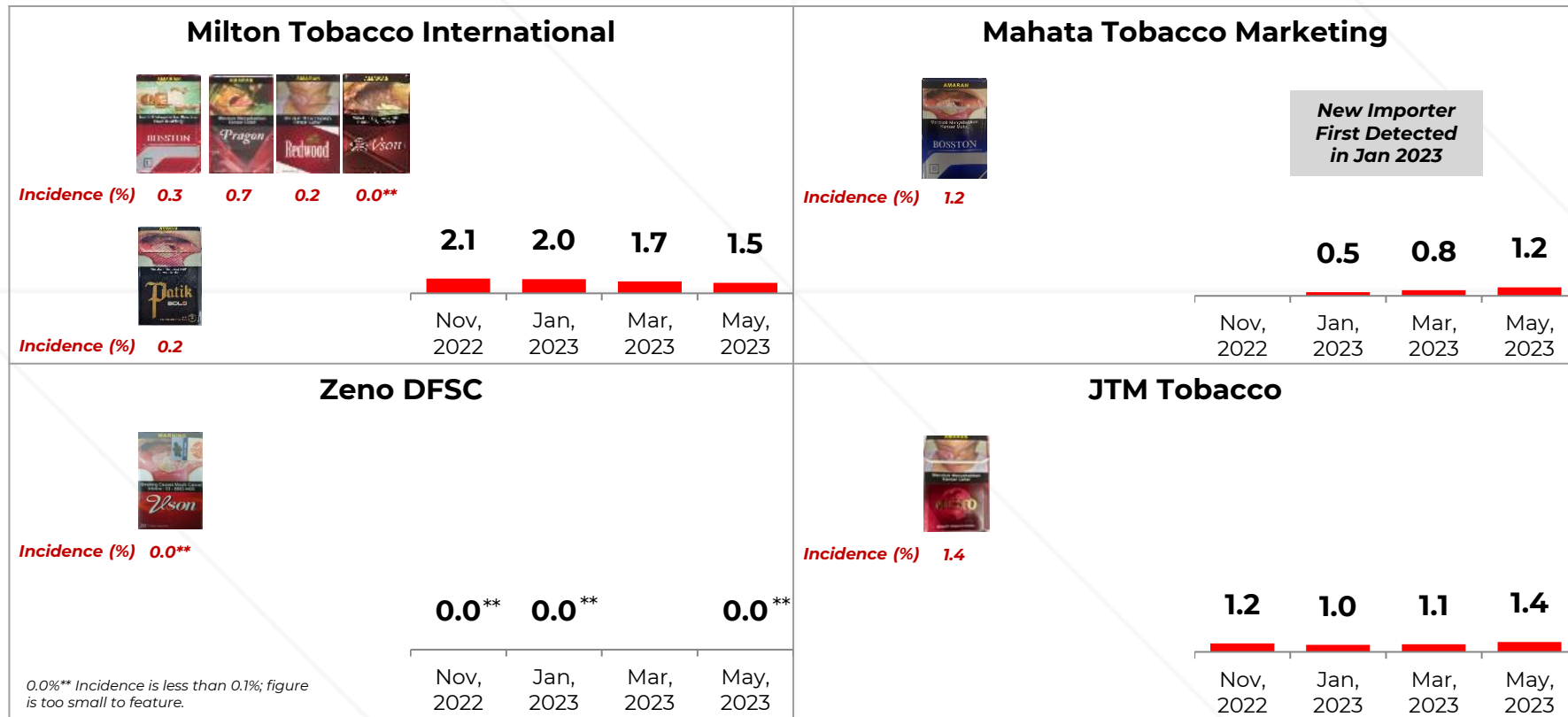
Fake Tax Stamp Breakdown By Manufacturers / Importers :

New importer detected : Global 55 Resource and JP Signature International



Fake Tax Stamp Breakdown By Manufacturers / Importers :

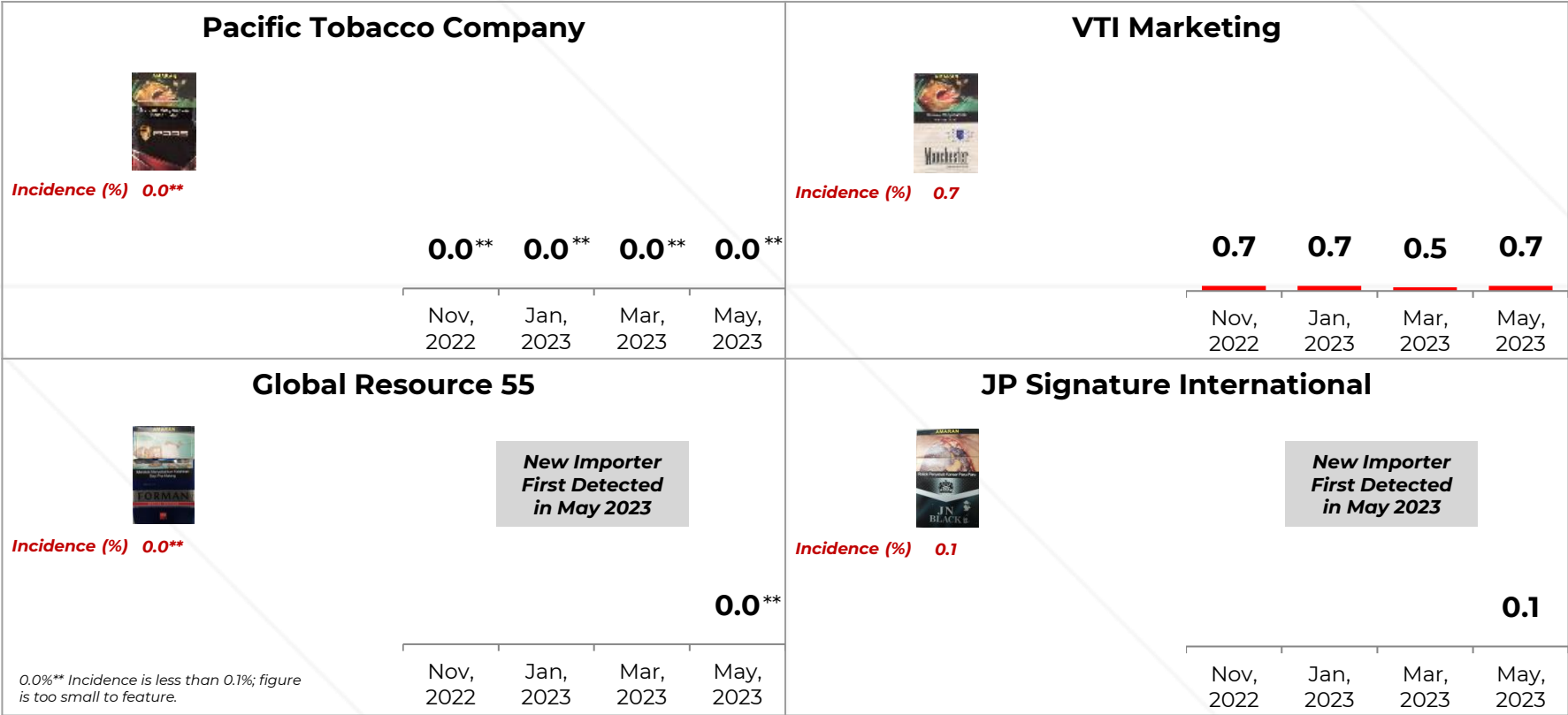
New importer detected : Global 55 Resource and JP Signature International



0.0%** Incidence is less than 0.1%; figure is too small to feature.

Fake Tax Stamp Breakdown By Manufacturers / Importers :

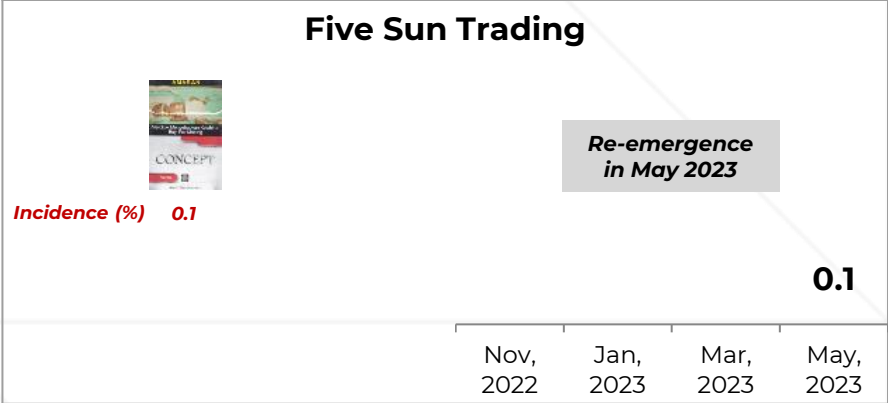
New importer detected : Global 55 Resource and JP Signature International



0.0%** Incidence is less than 0.1%; figure is too small to feature.

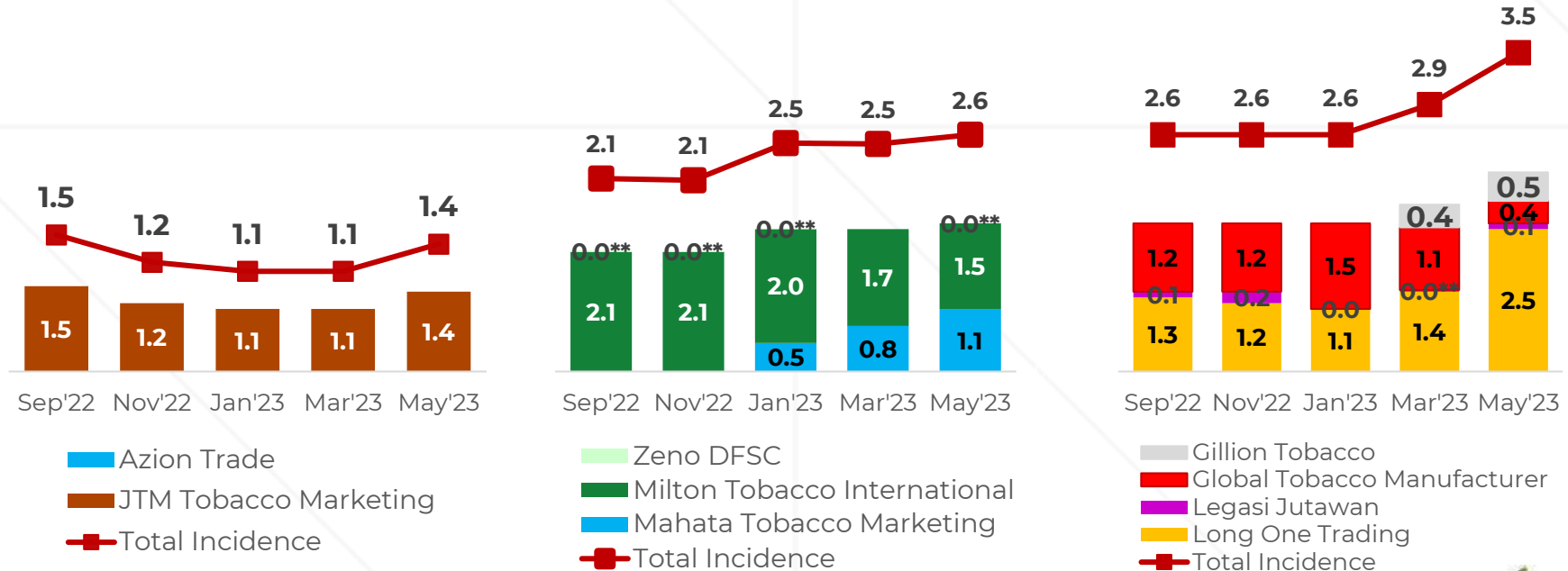
Fake Tax Stamp Breakdown By Manufacturers / Importers :

New importer detected : Global 55 Resource and JP Signature International



Fake Tax Stamp Breakdown By Manufacturers / Importers :

Incidence for packs imported by Long One Trading has increased by 1.1 ppt. in May'23



Illegal Cigarettes Incidence By State :

8 States recording an increase vs. Mar 2023

	A May, 2023				B Mar, 2023				A minus B Variance (May'2023 vs. Mar'2023)				Volume Contribution
	Total Illegal	Fake Tax Stamp	Smuggled Whites	Smuggled Kretek	Total Illegal	Fake Tax Stamp	Smuggled Whites	Smuggled Kretek	Total Illegal	Fake Tax Stamp	Smuggled Whites	Smuggled Kretek	%
Sarawak	79.9	0.0	65.0	14.9	79.4	0.0	67.4	12.0	+0.5	0.0	-2.4	+2.9	11%
Sabah	77.7	0.1	77.2	0.4	77.0	0.0	75.6	1.4	+0.7	+0.1	+1.6	-1.0	10%
Pahang	77.6	10.1	56.9	10.6	76.6	8.6	59.1	8.9	+1.0	+1.5	-2.2	+1.7	13%
Terengganu	67.4	6.9	55.1	5.4	69.5	17.1	45.1	7.3	-2.1	-10.2	+10.0	-1.9	4%
Johor	56.4	18.3	31.2	6.9	57.0	9.4	42.1	5.5	-0.6	+8.9	-10.9	+1.4	20%
Kelantan	50.2	0.2	47.1	2.9	35.0	0.3	32.4	2.3	+15.2	-0.1	+14.7	+0.6	2%
Perlis	49.9	2.1	36.0	11.8	44.6	0.2	36.8	7.6	+5.3	+1.9	-0.8	+4.2	0%**
Melaka	46.9	23.5	19.7	3.7	56.0	27.4	24.8	3.8	-9.1	-3.9	-5.1	-0.1	3%
Penang	46.9	4.9	38.9	3.1	45.8	9.8	31.9	4.1	+1.1	-4.9	+7.0	-1.0	5%
Selangor	45.9	4.6	28.7	12.6	46.3	2.4	32.0	11.9	-0.4	+2.2	-3.3	+0.7	17%
Kedah	44.6	6.8	30.0	7.8	43.6	2.2	35.8	5.6	+1.0	+4.6	-5.8	+2.2	3%
WP KL	41.2	0.7	30.0	10.5	41.6	1.6	32.2	7.8	-0.4	-0.9	-2.2	+2.7	7%
N.Sembilan	40.7	19.9	17.7	3.1	41.7	20.2	18.3	3.2	-1.0	-0.3	-0.6	-0.1	3%
Perak	34.3	15.3	18.4	0.6	34.2	11.6	21.3	1.3	+0.1	+3.7	-2.9	-0.7	3%
National Incidence	55.3	8.5	38.8	8.0	55.1	7.0	41.0	7.1	+0.2	+1.5	-2.2	+0.9	100%

Illegal Cigarettes Incidence By State :

4 States recording an increase vs. 2022

	A Mar, 2023				B 2022				A minus B Variance (May'2023 vs. 2022)				Volume Contribution
	Total Illegal	Fake Tax Stamp	Smuggled Whites	Smuggled Kretek	Total Illegal	Fake Tax Stamp	Smuggled Whites	Smuggled Kretek	Total Illegal	Fake Tax Stamp	Smuggled Whites	Smuggled Kretek	%
Sarawak	79.9	0.0	65.0	14.9	81.1	0.0	68.7	12.4	-1.2	0.0	-3.7	+2.5	11%
Sabah	77.7	0.1	77.2	0.4	79.5	0.0	75.9	3.6	-1.8	+0.1	+1.3	-3.2	10%
Pahang	77.6	10.1	56.9	10.6	67.0	11.3	48.4	7.3	+10.6	-1.2	+8.5	+3.3	13%
Terengganu	67.4	6.9	55.1	5.4	71.2	10.4	55.5	5.3	-3.8	-3.5	-0.4	+0.1	4%
Johor	56.4	18.3	31.2	6.9	54.1	13.2	34.5	6.4	+2.3	+5.1	-3.3	+0.5	20%
Kelantan	50.2	0.2	47.1	2.9	72.1	3.4	64.5	4.2	-21.9	-3.2	-17.4	-1.3	2%
Perlis	49.9	2.1	36.0	11.8	49.9	3.2	37.4	9.3	0.0	-1.1	-1.4	+2.5	0%**
Melaka	46.9	23.5	19.7	3.7	53.3	18.7	33.0	1.6	-6.4	+4.8	-13.3	+2.1	3%
Penang	46.9	4.9	38.9	3.1	46.1	8.7	35.1	2.3	+0.8	-3.8	+3.8	+0.8	5%
Selangor	45.9	4.6	28.7	12.6	47.9	6.2	29.8	11.9	-2.0	-1.6	-1.1	+0.7	17%
Kedah	44.6	6.8	30.0	7.8	60.1	6.3	47.6	6.2	-15.5	+0.5	-17.6	+1.6	3%
WP KL	41.2	0.7	30.0	10.5	43.6	1.6	31.8	10.2	-2.4	-0.9	-1.8	+0.3	7%
N.Sembilan	40.7	19.9	17.7	3.1	45.7	24.3	16.3	5.1	-5.0	-4.4	+1.4	-2.0	3%
Perak	34.3	15.3	18.4	0.6	32.2	12.7	18.0	1.5	+2.1	+2.6	+0.4	-0.9	3%
National Incidence	55.3	8.5	38.8	8.0	56.6	7.9	41.4	7.3	-1.3	+0.6	-2.6	+0.7	100%

Top 10 Illegal Cigarettes Brands* For Perlis

Volume contribution to National = 0%**

		May, 2023	Mar, 2023	2022
		SOM	SOM	SOM
Illegal Brand		(%)	(%)	(%)
1.	John	30.7	31.6	33.4
2.	Gudang Garam	10.7	7.1	8.6
3.	Vess	3.2	4.4	3.0
4.	Misto*	1.9	-	0.1
5.	Tiara	1.6	0.3	0.2
6.	Touro	1.0	0.1	0.6
7.	D&J	0.4	0.3	0.2
8.	Promax*	0.1	-	0.2
9.	A380*	0.1	-	0.4
10.	L.A.	0.1	0.3	0.1
Top 10 Total		49.8	44.1	46.8
Other Illegal		0.1	0.5	3.1
Total Illegal %		49.9	44.6	49.9

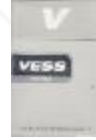
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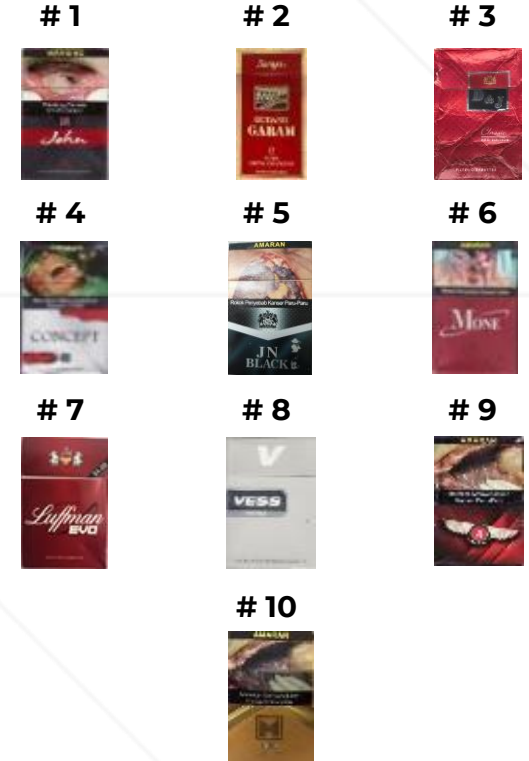
* relates to incidence of empty packs collected that meet any of illegal cigarettes criteria in page 3, regardless whether they are a legal brand or otherwise 0.0%** Incidence is less than 0.1%; figure is too small to feature.

Top 10 Illegal Cigarettes Brands* For Kedah

Volume contribution to National = 3%

		May, 2023	Mar, 2023	2022
		SOM	SOM	SOM
Illegal Brand		(%)	(%)	(%)
1.	John	19.7	17.1	42.8
2.	Gudang Garam	7.8	5.6	6.1
3.	D&J	3.4	5.1	0.8
4.	Concept*	3.0	0.2	1.0
5.	JN	2.7	0.1	-
6.	Mone	2.6	2.7	-
7.	Luffman	2.6	2.0	0.4
8.	Vess	1.5	3.4	2.2
9.	A380*	0.6	1.6	0.5
10.	M*	0.4	-	0.5
Top 10 Total		44.3	37.8	54.3

Other Illegal		0.3	5.8	5.8
Total Illegal %		44.6	43.6	60.1

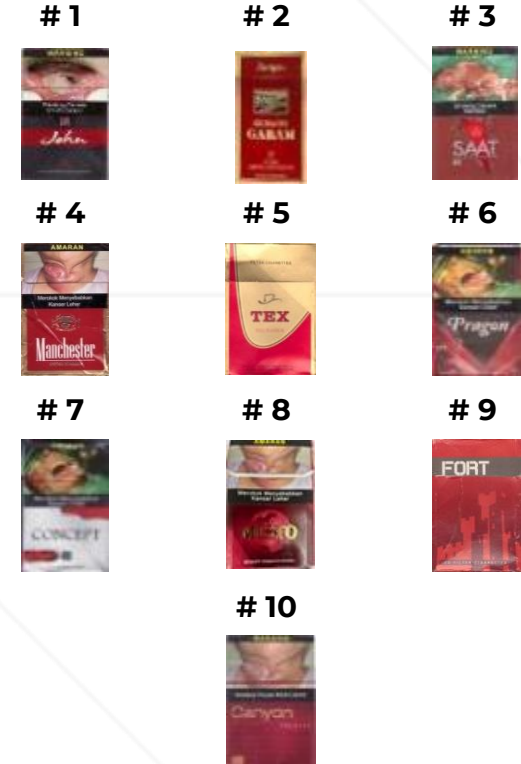


* relates to incidence of empty packs collected that meet any of illegal cigarettes criteria in page 3, regardless whether they are a legal brand or otherwise

Top 10 Illegal Cigarettes Brands* For Penang

Volume contribution to National = 5%

		May, 2023	Mar, 2023	2022
		SOM	SOM	SOM
Illegal Brand		(%)	(%)	(%)
1.	John	33.0	28.7	25.5
2.	Gudang Garam	2.8	4.0	2.2
3.	Saat	2.8	1.2	5.5
4.	Manchester*	1.7	4.1	2.9
5.	Tex	1.3	0.7	0.6
6.	Pragon*	1.0	1.3	1.1
7.	Concept*	0.7	0.9	0.9
8.	Misto*	0.6	0.1	0.3
9.	Fort	0.4	-	0.1
10.	Canyon	0.4	-	0.2
Top 10 Total		44.7	41.0	39.3
Other Illegal		2.2	4.8	6.8
Total Illegal %		46.9	45.8	46.1



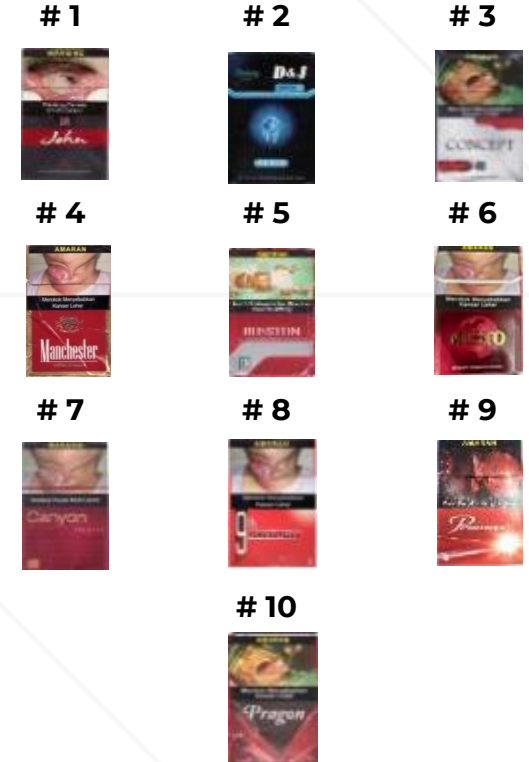
* relates to incidence of empty packs collected that meet any of illegal cigarettes criteria in page 3, regardless whether they are a legal brand or otherwise

Top 10 Illegal Cigarettes Brands* For Perak

Volume contribution to National = 3%

		May, 2023	Mar, 2023	2022
		SOM	SOM	SOM
Illegal Brand		(%)	(%)	(%)
1.	John	10.3	13.3	10.8
2.	D&J	3.7	4.3	3.3
3.	Concept*	2.7	3.0	1.6
4.	Manchester*	2.1	2.8	2.1
5.	Bosston*	2.0	1.8	2.2
6.	Misto*	1.9	1.1	1.7
7.	Canyon	1.8	2.0	1.7
8.	9th Century*	1.6	1.1	1.7
9.	Promax*	1.5	0.5	0.8
10.	Pragon*	0.9	0.4	0.8
Top 10 Total		28.5	30.3	26.7

Other Illegal		5.8	3.9	5.5
Total Illegal %		34.3	34.2	32.2



* relates to incidence of empty packs collected that meet any of illegal cigarettes criteria in page 3, regardless whether they are a legal brand or otherwise

Top 10 Illegal Cigarettes Brands* For Selangor

Volume contribution to National = 17%

		May, 2023	Mar, 2023	2022
		SOM	SOM	SOM
Illegal Brand		(%)	(%)	(%)
1.	John	11.3	12.9	12.1
2.	U2	7.8	8.7	6.8
3.	Cudang Garam	7.4	8.4	7.1
4.	Canyon	4.1	6.4	4.7
5.	L.A.	3.5	3.3	3.5
6.	Luffman	2.6	2.5	3.6
7.	Zon King	2.1	1.3	1.7
8.	Sampoerna	1.6	-	0.4
9.	A380*	1.4	0.9	1.6
10.	Misto*	1.2	0.5	2.3
Top 10 Total		43.0	44.9	43.8
Other Illegal		2.9	1.4	4.1
Total Illegal %		45.9	46.3	47.9

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* relates to incidence of empty packs collected that meet any of illegal cigarettes criteria in page 3, regardless whether they are a legal brand or otherwise

Top 10 Illegal Cigarettes Brands* For WP KL

Volume contribution to National = 7%

		May, 2023	Mar, 2023	2022
		SOM	SOM	SOM
Illegal Brand		(%)	(%)	(%)
1.	John	11.1	12.3	12.3
2.	U2	8.8	7.3	7.7
3.	Cudang Garam	6.3	3.5	5.5
4.	Canyon	3.7	3.7	4.3
5.	Luffman	3.4	4.6	4.2
6.	L.A.	3.1	4.0	3.4
7.	Zon King	2.6	4.0	2.3
8.	Sampoerna	1.0	0.2	0.5
9.	Saat	0.2	0.1	0.6
10.	9th Century*	0.2	-	0.1
Top 10 Total		40.4	39.7	40.9
<i>Other Illegal</i>		0.8	1.9	2.7
Total Illegal %		41.2	41.6	43.6

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* relates to incidence of empty packs collected that meet any of illegal cigarettes criteria in page 3, regardless whether they are a legal brand or otherwise

Top 10 Illegal Cigarettes Brands* For N.Sembilan

Volume contribution to National = 3%

		May, 2023	Mar, 2023	2022
		SOM	SOM	SOM
	Illegal Brand	(%)	(%)	(%)
1.	Canyon	9.5	6.4	8.1
2.	Misto*	8.1	11.8	10.4
3.	A380*	5.7	7.6	7.3
4.	John	4.9	3.7	4.4
5.	Gudang Garam	3.0	2.7	4.0
6.	6th Sense*	2.7	1.6	1.4
7.	Pragon*	1.9	1.5	0.4
8.	U2	1.4	0.8	2.2
9.	League	1.4	0.3	0.3
10.	Promax*	0.4	0.1	0.2
Top 10 Total		39.0	36.5	38.7

Other Illegal		1.7	5.2	7.0
Total Illegal %		40.7	41.7	45.7



* relates to incidence of empty packs collected that meet any of illegal cigarettes criteria in page 3, regardless whether they are a legal brand or otherwise

Top 10 Illegal Cigarettes Brands* For Melaka

Volume contribution to National = 3%

		May, 2023	Mar, 2023	2022
		SOM	SOM	SOM
	Illegal Brand	(%)	(%)	(%)
1.	John	10.6	13.4	16.8
2.	SOHO*	10.5	11.9	1.8
3.	Canyon	8.6	10.0	15.6
4.	Bosston*	3.9	3.0	4.0
5.	Gudang Garam	3.3	3.5	0.9
6.	Misto*	3.3	5.2	2.6
7.	Promax*	1.6	2.4	4.6
8.	9 th Century*	1.0	0.2	0.6
9.	Redwood*	0.8	1.1	0.4
10.	Concept*	0.7	0.3	0.6
Top 10 Total		44.3	51.0	47.9
Other Illegal		2.6	5.0	5.4
Total Illegal %		46.9	56.0	53.3



* relates to incidence of empty packs collected that meet any of illegal cigarettes criteria in page 3, regardless whether they are a legal brand or otherwise
 0.0%** Incidence is less than 0.1%; figure is too small to feature.

Top 10 Illegal Cigarettes Brands* For Johor

Volume contribution to National = 20%

		May, 2023	Mar, 2023	2022
		SOM	SOM	SOM
	Illegal Brand	(%)	(%)	(%)
1.	Canyon	15.4	16.9	14.6
2.	John	7.9	13.7	12.7
3.	U2	5.4	10.3	5.8
4.	Gudang Garam	4.4	4.6	4.1
5.	Bosston*	2.7	1.8	3.3
6.	Misto*	2.6	1.8	4.0
7.	SOHO*	2.6	0.5	0.6
8.	Conceot*	2.5	0.7	1.0
9.	Manchester*	2.5	0.3	0.8
10.	RE	1.6	-	0.7
Top 10 Total		47.6	50.6	47.6

<i>Other Illegal</i>		8.8	6.4	6.5
Total Illegal %		56.4	57.0	54.1



* relates to incidence of empty packs collected that meet any of illegal cigarettes criteria in page 3, regardless whether they are a legal brand or otherwise

Top 10 Illegal Cigarettes Brands* For Pahang

Volume contribution to National = 13%

		May, 2023	Mar, 2023	2022
		SOM	SOM	SOM
Illegal Brand		(%)	(%)	(%)
1.	John	30.0	30.1	27.1
2.	Canyon	13.9	15.9	8.8
3.	U2	12.1	10.8	9.8
4.	Gudang Garam	9.4	8.2	5.8
5.	Bosston*	5.9	4.9	6.6
6.	Concept*	1.7	1.0	1.4
7.	Pragon*	1.2	0.5	0.9
8.	Misto*	0.6	0.9	0.7
9.	Touro	0.6	0.3	0.9
10.	Patik*	0.4	-	0.0**
Top 10 Total		75.8	72.6	62.0
Other Illegal		1.8	4.0	5.0
Total Illegal %		77.6	76.6	67.0



* relates to incidence of empty packs collected that meet any of illegal cigarettes criteria in page 3, regardless whether they are a legal brand or otherwise
 0.0%** Incidence is less than 0.1%; figure is too small to feature.

Top 10 Illegal Cigarettes Brands* For Terengganu

Volume contribution to National = 4%

		May, 2023	Mar, 2023	2022
		SOM	SOM	SOM
Illegal Brand		(%)	(%)	(%)
1.	John	44.3	35.0	36.5
2.	Gudang Garam	5.4	7.3	5.1
3.	Saat	4.1	2.8	10.4
4.	U2	3.9	4.5	5.4
5.	Pragon*	1.7	6.8	5.4
6.	Redwood*	1.0	3.2	0.7
7.	A380*	1.0	0.9	0.4
8.	Bosston*	0.9	1.4	0.3
9.	Misto*	0.9	3.3	1.4
10.	Premium	0.8	0.2	0.2
Top 10 Total		64.0	65.4	65.8

Other Illegal		3.4	4.1	5.4
Total Illegal %		67.4	69.5	71.2

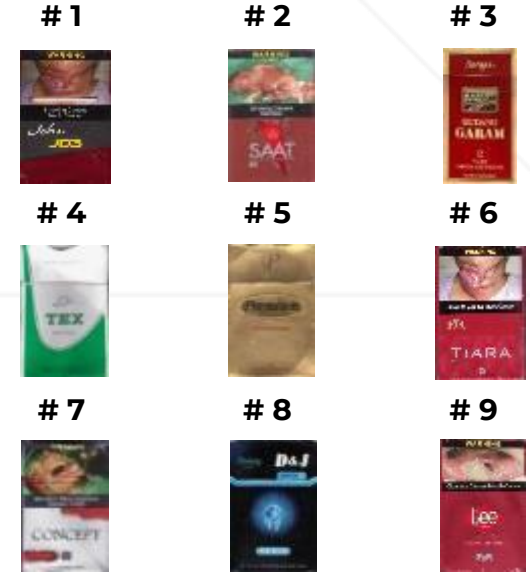


* relates to incidence of empty packs collected that meet any of illegal cigarettes criteria in page 3, regardless whether they are a legal brand or otherwise

Top 9 Illegal Cigarettes Brands* For Kelantan

Volume contribution to National = 2%

		May, 2023	Mar, 2023	2022
		SOM	SOM	SOM
Illegal Brand		(%)	(%)	(%)
1.	John	30.4	23.9	34.3
2.	Saat	15.7	7.3	25.8
3.	Gudang Garam	2.9	2.3	4.1
4.	Premium	0.5	0.3	0.6
5.	Tex	0.2	0.4	0.3
6.	Tiara	0.2	-	0.2
7.	Concept*	0.2	0.3	2.8
8.	D&J	0.1	0.1	0.0**
9.	Lee	0.0**	0.3	2.5
Top 9 Total		50.2	34.9	70.6
Other Illegal		-	0.1	1.5
Total Illegal %		50.2	35.0	72.1

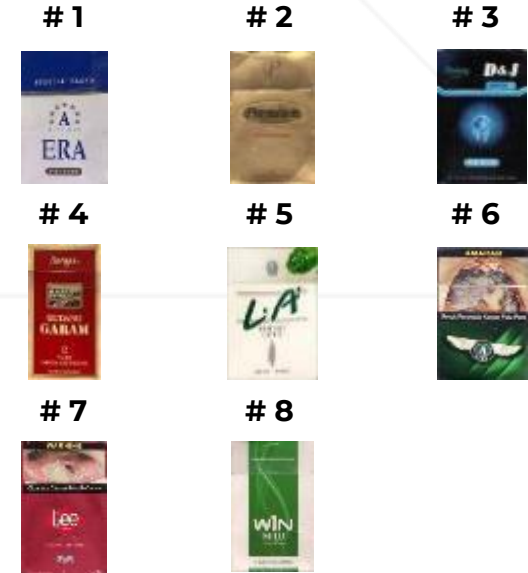


* relates to incidence of empty packs collected that meet any of illegal cigarettes criteria in page 3, regardless whether they are a legal brand or otherwise
 0.0%** Incidence is less than 0.1%; figure is too small to feature.

Top 8 Illegal Cigarettes Brands* For Sabah

Volume contribution to National = 10%

		May, 2023	Mar, 2023	2022
		SOM	SOM	SOM
Illegal Brand		(%)	(%)	(%)
1.	Era	74.4	74.4	70.4
2.	Premium	1.9	0.9	3.8
3.	D&J	0.9	0.2	1.1
4.	Gudang Garam	0.2	0.1	1.3
5.	L.A.	0.2	1.2	1.8
6.	A380*	0.1	-	0.0**
7.	Lee	0.0**	-	-
8.	Win Mild	0.0**	-	0.5
Top 8 Total		77.7	76.8	78.9
Other Illegal		-	0.2	0.6
Total Illegal %		77.7	77.0	79.5



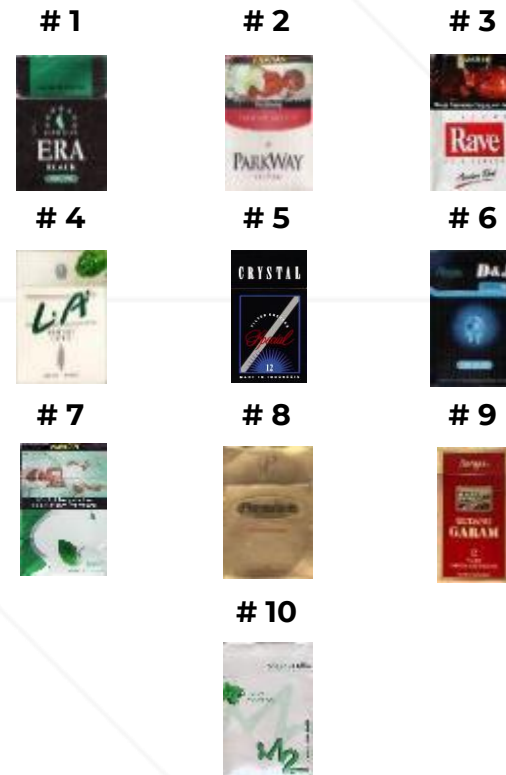
* relates to incidence of empty packs collected that meet any of illegal cigarettes criteria in page 3, regardless whether they are a legal brand or otherwise
 0.0** Incidence is less than 0.1%; figure is too small to feature.

Top 10 Illegal Cigarettes Brands* For Sarawak


Volume contribution to National = 11%

		May, 2023	Mar, 2023	2022
		SOM	SOM	SOM
Illegal Brand		(%)	(%)	(%)
1.	Era	24.9	31.0	27.7
2.	Parkway	19.9	18.0	20.2
3.	Rave	16.2	12.8	12.1
4.	L.A.	8.2	9.2	6.7
5.	Crystal	3.6	0.1	0.8
6.	D&J	2.1	2.7	3.9
7.	S Super	1.4	0.4	3.4
8.	Premium	0.8	0.8	0.8
9.	Gudang Garam	0.8	0.7	0.7
10.	Master Mild M2	0.4	1.4	0.4
Top 10 Total		78.3	77.1	76.7

Other Illegal		1.6	2.3	4.4
Total Illegal %		79.9	79.4	81.1



* relates to incidence of empty packs collected that meet any of illegal cigarettes criteria in page 3, regardless whether they are a legal brand or otherwise



Appendix: Nielsen's ICS Research Objective & Methodology

Research Objectives

1

Identify the **incidence & trend** of illegal cigarettes in Malaysia & at State Level

2

Identify the **illegal brands** available in Malaysia and at State Level

3

Identify the level of **compliance vs. non-compliance** on cigarette packs



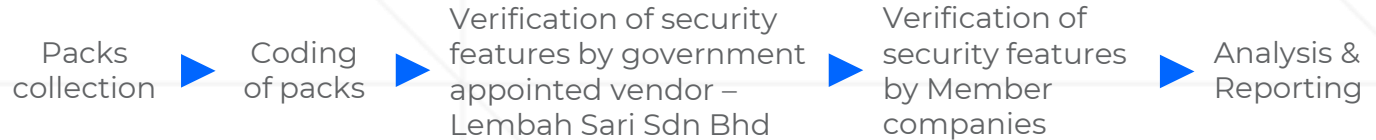
- I. Security features (Tax Stamps)
- II. Brands of Local Manufacturers and Importers registered with Royal Malaysian Customs
- III. Mandated Labeling Requirements (under Control of Tobacco Product Regulations, Trade Description Act, Price Control & Anti Profiteering Act)

Overview Of Study Framework

METHODOLOGY

- Method: **Litter collection of cigarette packs.**
- Frequency: **6 waves** in a year.
- Geographical coverage: Nationwide (Pen. M'sia and Sabah & Sarawak)
- Sample size: Nationwide **20,400 packs per wave** (Pen M'sia = A minimum of 1,200 packs per State, Sabah & Sarawak = 1,600 packs each)

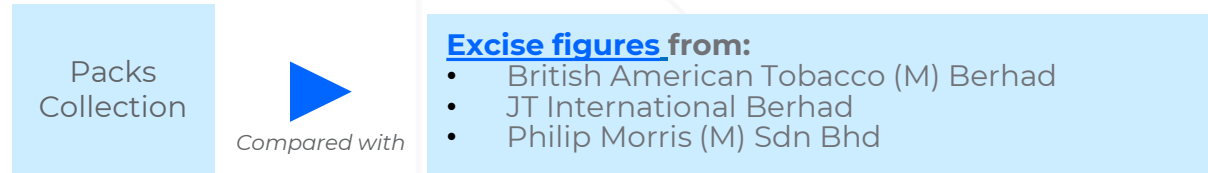
PROCESS



SAMPLING ERROR

- 0.6% at national level and minimum 2.8% at state level

RELIABILITY



A correlation of **0.99** consecutively since 1993 to 2023 were achieved indicating that the Litter Survey is reliable.



ICS Research Methodology & Design

i. ICS Universe, Sample Size

ii. Sampling Coverage Of ICS and Fieldwork

iii. Coding Processes

iv. Data Processing

v. Weighting The Survey Data

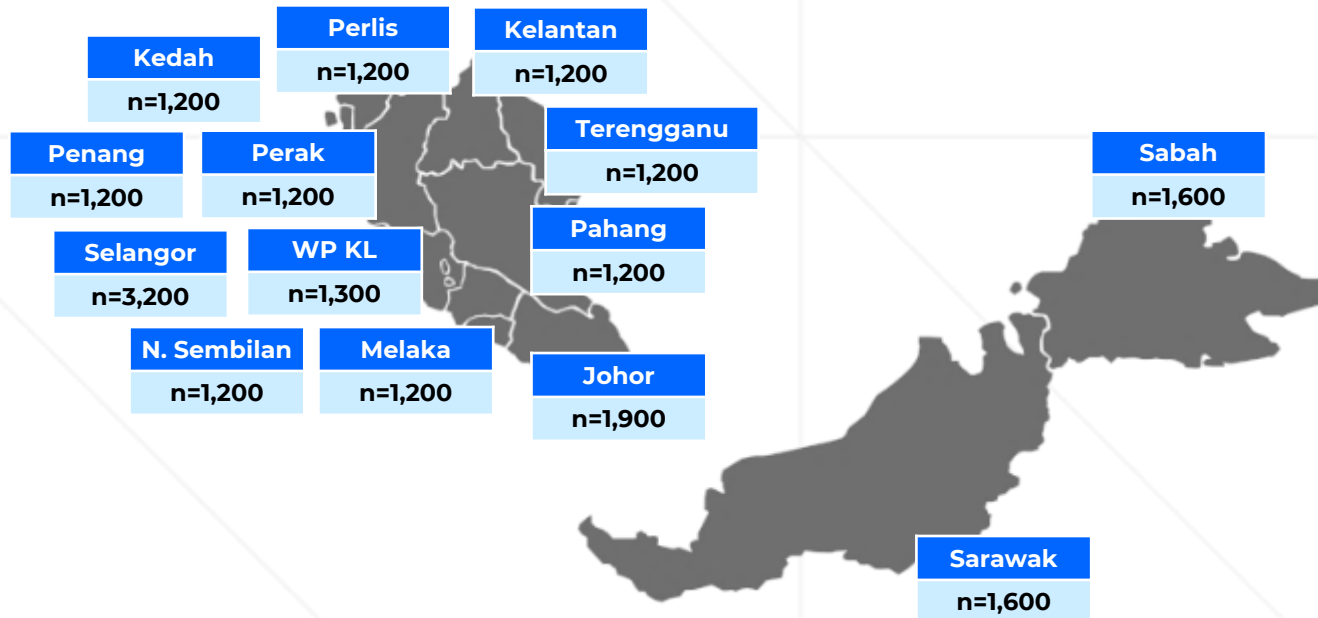
Why Sample Size of 20,000 packs?

Sample Size (n=)	Sampling Error @ 95% Confidence
n=50	14.9%
n=100	9.9%
n=250	5.9%
n=500	4.1%
n=1,000	2.8%
n=2,000	2.0%
n=3,000	1.6%
n=4,000	1.4%
n=10,000	0.8%
n=20,000	0.6%
n=50,000	0.4%

- The data accuracy for a sample size is dependent on the sample size of a study; **Sampling error declines** as **sample size** for a study is **increased**
- To ensure minimal sampling error at **National level**, **sample size of n=20,000** was chosen
- At State level, a minimum sample size of n=1,200 was chosen to optimize data accuracy without impacting the efficiency of fieldwork turnaround time.

Geographical Coverage & Sample Size For Each State

- State in Pen Malaysia, minimum sample size n=1,200
- State in East Malaysia, sample size n=1,600
- **These sample size are robust** taking into consideration geographical landscape, different cigarettes volume pattern and efficient turnaround of fieldwork





ICS Research Methodology & Design

i. ICS Universe, Sample Size

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Sampling Coverage of ICS

STATE	DISTRICT COVERED		
Perlis	Kangar		
Kedah	Kuala Muda	Kota Setar	Kulim
	Kubang Pasu	Baling	Pendang
Penang	Timur Laut	Seberang Perai Tengah	Seberang Perai Utara
Perak	Kinta	Larut & Matang	Manjung
	Hilir Perak	Kerian	
Selangor	Petaling	Ulu Langat	Klang
	Gombak	Kuala Langat	
WP KL	Spread across KL		
N. Sembilan	Seremban	Jempol	Port Dickson
	Tampin		
Melaka	Melaka	Alor Gajah	
Johor	Johor Bahru	Batu Pahat	Kluang
	Kulai Jaya	Muar	Kota Tinggi
Pahang	Kuantan	Temerloh	Bentong
	Maran	Rompin	Pekan
Terengganu	Kuala Terengganu	Kemaman	Dungun
	Besut		
Kelantan	Kota Bharu	Pasir Mas	Tumpat
	Bachok	Tanah Merah	
Sabah	Kota Kinabau	Tawau	Sandakan
	Lahad Datu	Keningau	Semporna
	Papar	Penampang	Beluran
	Tuaran	Ranau	Kota Belud
Sarawak	Kuching	Miri	Sibu
	Bintulu	Serian	Samarahan
	Sri Aman	Sarikei	Kapit
	Bau	Limbang	Saratok

- Nationwide
- All 13 states in Peninsular and East Malaysia and KL Federal Territory
- Covers each state's **top 50% most populous** districts
- The sampling approach ensure **both Urban & Rural** coverage reflects data released by Malaysia Department of Statistic (Census 2010)

Flow Chart For Pre-Fieldwork & Fieldwork

Establish starting point of collection



Collect 25 packs from the street each week

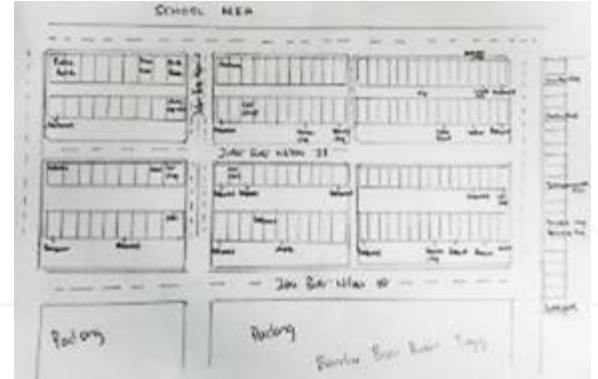


Attach label to bag: Standard label with the following:

- *State*
- *Location collected*
- *Area type*
- *Date of collection*



Packs will then be delivered to Nielsen's Head Office at KL for coding



Guidelines For Pack Collection

- All Packs collected from the collection points must be in decent condition. If not Lembah Sari Sdn. Bhd. will not be able to validate the authenticity of a pack if the packs are so badly damaged that certain key elements are missing
- Instruction to collectors is to collect pack in decent condition.
- No instruction on brand restriction is issued (hence, [rejection of packs in poor condition applies to all](#) brands)
- As such, collectors will have no preference on the packs being collected as long as it is in decent condition
- Remuneration for packs collected are standard across all pack type / brand



Visual Examples of Unacceptable Packs



ICS Research Methodology & Design

- i. ICS Universe, Sample Size
- ii. Sampling Coverage Of ICS and Fieldwork

iii. Coding Processes

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- v. Weighting The Survey Data

A Robust SOP For Pack Verification & Coding Process

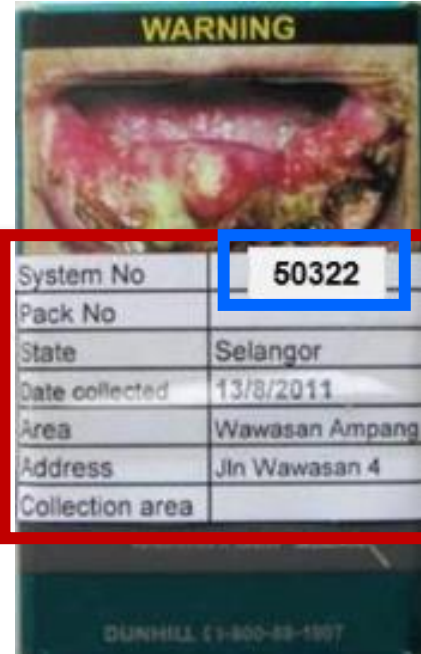
The following diagram illustrates the pack verification & coding process



Coding & Storage Process At Nielsen HQ



1. Packs which arrive at Nielsen HQ are assigned a unique pack ID number



Pack Sample

A unique ID is assigned to each pack when it reach Nielsen HQ

Each cigarettes pack which arrive will have a sticker with details on when and where it is collected

Coding & Storage Process At Nielsen HQ



2. Once the pack ID number is assigned, data entry process will begin. All information on the pack will be captured

3. When data entry is completed, the packs are sorted by brands and types



Coding & Storage Process At Nielsen HQ

4. Once the sorting is complete, the cigarettes packs are stored on shelves with labeling for easy retrieval when required



Illegal Cigarettes Criteria For Verification

Packs with at least one (1) of the following features:

1. Absence of Registered Importers
2. Unregistered Importers*
3. Absence of Registered Manufacturers
4. Unregistered Manufacturers*
5. Packs with counterfeit (fake) Malaysian tax stamp**
6. Packs without Malaysian tax stamp
7. Packs with non-Malaysian tax stamp
8. Unregistered Brand*
9. Non Compliance to Ministry of Health's Control of Tobacco Product Regulations (CTPR) 2004
 - I. Absence or Non Compliance of Pictorial Health Warning Requirements
 - II. Pack Size other than 20 sticks
 - III. Absence or Non Compliance of mandated labeling requirements

* Not registered with the Royal Malaysian Customs

** Verified by Lembah Sari Sdn Bhd (LSSB) – Government appointed sole vendor for tax stamp

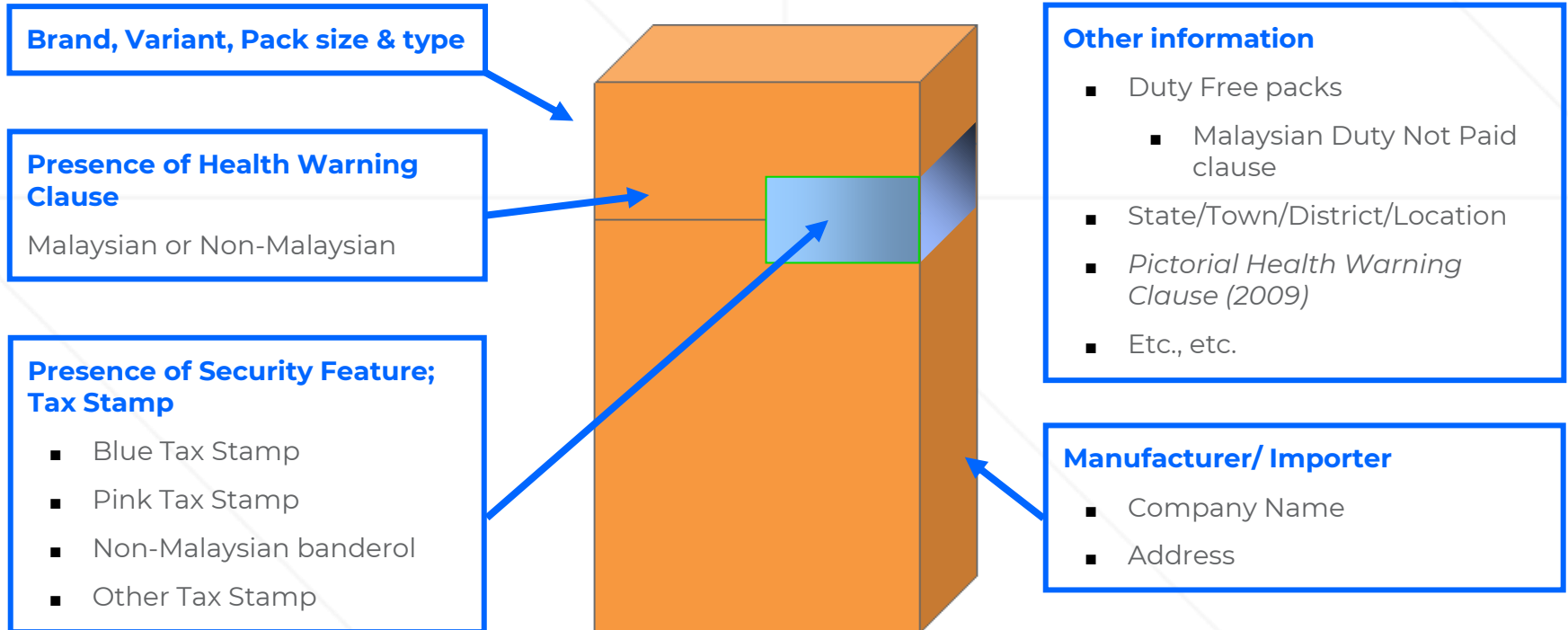
Regulations Set By The Malaysian Government

- All locally manufactured cigarettes and imported cigarettes are required to meet the following criteria:
 - **Registered brand** with Customs
 - **Registered manufacturer** with Customs
 - **Registered importer** with Customs (if it is an imported pack)
 - **Malaysian labeling requirements** i.e. pictorial health warning clause, textual health warning clause, “no sales to under 18” clause, manufacturing date, name and address on manufacturer/importer
 - **Pack size** of not less than 20 sticks
- Additional security features for imported / manufactured packs for **domestic** consumption:
 - Blue tax stamp
- Additional security features for imported / manufactured packs for **duty free** consumption:
 - Pink tax stamp

** relates to incidence of empty packs collected that meet any of illegal cigarettes criteria in page 3, regardless whether they are a legal brand or otherwise*

Visible Elements Captured By ICS

The following visible elements is **checked & coded / captured** for **each** of the collected packs by Nielsen Malaysia



Information on registered brands, registered manufacturers/ Importers is provided by CMTM

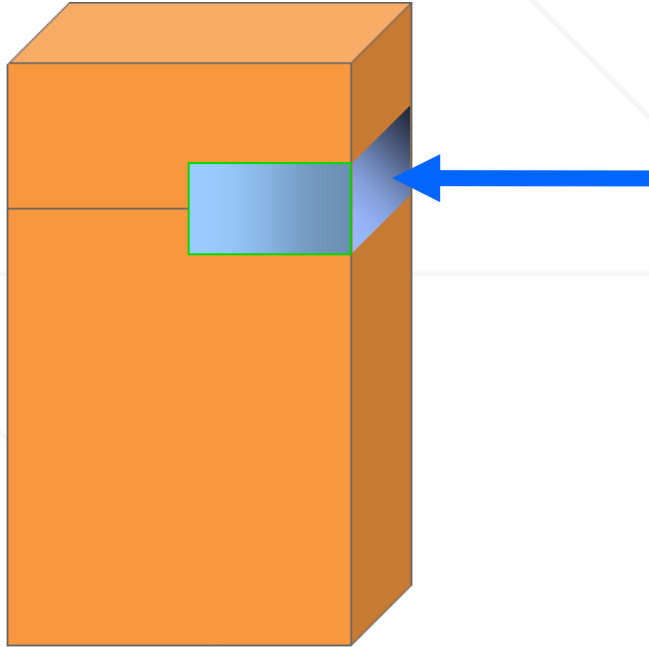
Verification Of Security Tax Stamp

- **Tax Stamps** are verified by Lembah Sari using the special reader/tool
- Verification outcome: **sign off by Lembah Sari** & Nielsen as witness

No	Pack ID System	Brand	Pack Size	Security link	Remarks (by LSSB)
10	7 30720	John	20	F	
11	8 111130	John	20	F	
12	9 110215	John	20	F	
13	10 101121	John	20	F	
14	11 40096	John	20	F	
15	12 40792	John	20	F	
16	13 121022	John	20	F	
17	14 100813	John	20	F	
18	15 121195	John	20	F	
19	16 110975	John	20	F	
20	17 60734	John	20	F	
21	18 110977	John	20	F	
22	19 41154	John	20	F	
23	20 40794	John	20	F	
24	21 40699	John	20	F	
25	22 40700	John	20	F	
26	23 40711	John	20	F	
27	24 10898	John	20	F	
28	25 41090	John	20	F	
29	26 40852	John	20	F	
30	27 40996	John	20	F	
31	28 4167	John	20	F	
32	29 111160	John	20	F	
33	30 41032	John	20	F	
34	31 40639	John	20	F	
35	32 120799	John	20	F	
36	33 41043	John	20	F	
37	34 4088	John	20	F	



Verification Of Security Tax Stamp



Blue Tax Stamp
(Domestic Market)

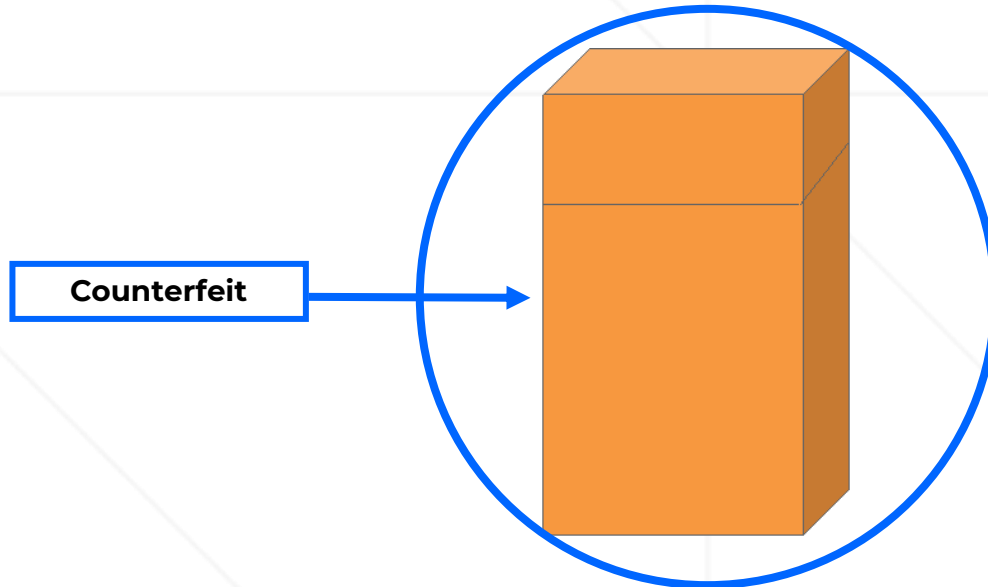
OR



Pink Tax Stamp
(Duty Free Market)

Verification Of Non-Visible Elements

- Only applicable to CMTM members' brands
- **Verification** by the respective member companies' **technical experts**
- Pack **IDs of identified Counterfeit packs** are given to Nielsen Malaysia





ICS Research Methodology & Design

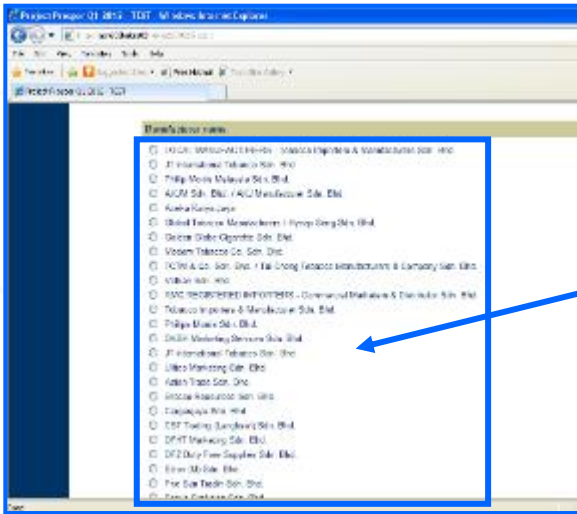
- i. ICS Universe, Sample Size
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Data Processing (Data Cleaning & Merging)

- Software program to ensure data accuracy
- Logic checks on brand and manufacturers
- Security feature verification results merged into data file



Control of Response List by Researchers

- Data entry **can only input data as per the response list provided**
- **Any new information** to be added to the response list is **subject to Research Team approval**
- Research Team will **review and validate the new details** before adding in any new response into the system

Data Processing (Quality Control)

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	W300001	W30001	OS W300										
2	1	24003	Wave 3, Week 33	03/10/20	03/10/20	Johor	Johor - Ba Ubar	Johor	Bar Tannan Bc South (Joh)	Dunhill Re			
3	2	24003	Wave 3, Week 33	03/10/20	03/10/20	Perlis	Perlis - Ka Ubar	Perlis	Kar Jalan Arb, North (Per)	Peter Stay			
4	3	24003	Wave 3, Week 33	03/10/20	03/10/20	Selangor	Selangor - K Ubar	Selangor	Ka Likas - Tin East Mela	Dunhill Re			
5	4	24003	Wave 3, Week 33	03/10/20	03/10/20	Perlis	Perlis - Ka Ubar	Perlis	Kar Jalan Arb, North (Per)	Dunhill Re			
6	5	24003	Wave 3, Week 33	03/10/20	03/10/20	Selangor	Selangor - K Ubar	Jin Pagar	Jalan Pas, East Mela	Dunhill Re			
7	6	24004	Wave 3, Week 33	03/10/20	03/10/20	Selangor	Selangor - K Ubar	Selangor	Ka Likas - Tin East Mela	Winston P			
8	7	24004	Wave 3, Week 33	03/10/20	03/10/20	Johor	Johor - Ba Ubar	Johor	Bar Tannan Bc South (Joh)	Dunhill Re			
9	8	24005	Wave 3, Week 33	03/10/20	03/10/20	Johor	Johor - Ba Ubar	Johor	Bar Tannan Bc South (Joh)	Dunhill Re			
10	9	24005	Wave 3, Week 33	03/10/20	03/10/20	Selangor	Selangor - K Ubar	Selangor	Ka Likas - Tin East Mela	Dunhill Re			
11	10	24006	Wave 3, Week 33	03/10/20	03/10/20	Johor	Johor - Ba Ubar	Johor	Bar Tannan Bc South (Joh)	Dunhill Re			
12	11	24006	Wave 3, Week 33	03/10/20	03/10/20	Selangor	Selangor - K Ubar	Jin Pagar	Jalan Pas, East Mela	Dunhill Re			
13	12	24006	Wave 3, Week 33	03/10/20	03/10/20	Selangor	Selangor - K Ubar	Selangor	Ka Likas - Tin East Mela	Gadang G			
14	13	24007	Wave 3, Week 33	03/10/20	03/10/20	Selangor	Selangor - K Ubar	Selangor	Ka Likas - Tin East Mela	Gadang G			
15	14	24007	Wave 3, Week 33	03/10/20	03/10/20	Kedah	Kedah - A Ubar	Jalan Pag	Jalan Pag North (Per)	Marlboro G			
16	15	24007	Wave 3, Week 33	03/10/20	03/10/20	Selangor	Selangor - K Ubar	Jin Pagar	Jalan Pas, East Mela	Dunhill Re			
17	16	24007	Wave 3, Week 33	03/10/20	03/10/20	Johor	Johor - Ba Ubar	Johor	Bar Tannan Bc South (Joh)	Winston P			
18	17	24008	Wave 3, Week 33	03/10/20	03/10/20	Johor	Johor - Ba Ubar	Johor	Bar Tannan Bc South (Joh)	Winston P			
19	18	24008	Wave 3, Week 33	03/10/20	03/10/20	Selangor	Selangor - K Ubar	Jin Pagar	Jalan Pas, East Mela	Premium S			
20	19	24008	Wave 3, Week 33	03/10/20	03/10/20	Selangor	Selangor - K Ubar	Selangor	Ka Likas - Tin East Mela	Gadang G			
21	20	24009	Wave 3, Week 33	03/10/20	03/10/20	Selangor	Selangor - K Ubar	Selangor	Ka Likas - Tin East Mela	Gadang G			
22	21	24009	Wave 3, Week 33	03/10/20	03/10/20	Perlis	Perlis - Ka Ubar	Perlis	Kar Jalan Arb, North (Per)	Sekem Ma			
23	22	24009	Wave 3, Week 33	03/10/20	03/10/20	Kedah	Kedah - A Ubar	Jalan Pag	Jalan Pag North (Per)	Marlboro G			
24	23	24010	Wave 3, Week 33	03/10/20	03/10/20	Selangor	Selangor - K Ubar	Selangor	Ka Likas - Tin East Mela	Marlboro G			
25	24	24010	Wave 3, Week 33	03/10/20	03/10/20	Selangor	Selangor - K Ubar	Jin Pagar	Jalan Pas, East Mela	Premium S			
26	25	24011	Wave 3, Week 33	03/10/20	03/10/20	Selangor	Selangor - K Ubar	Selangor	Ka Likas - Tin East Mela	Premium S			
27	26	24011	Wave 3, Week 33	03/10/20	03/10/20	Selangor	Selangor - K Ubar	Jin Pagar	Jalan Pas, East Mela	Premium S			
28	27	24009	Wave 3, Week 33	03/10/20	03/10/20	Johor	Johor - Ba Ubar	Johor	Bar Tannan Bc South (Joh)	Winston P			
29	28	24009	Wave 3, Week 33	03/10/20	03/10/20	Kedah	Kedah - A Ubar	Jalan Pag	Jalan Pag North (Per)	Marlboro G			
30	29	24010	Wave 3, Week 33	03/10/20	03/10/20	Perlis	Perlis - Ka Ubar	Perlis	Kar Jalan Arb, North (Per)	Marlboro G			
31	30	24010	Wave 3, Week 33	03/10/20	03/10/20	Johor	Johor - Ba Ubar	Johor	Bar Tannan Bc South (Joh)	Winston P			
32	31	24005	Wave 3, Week 33	03/10/20	03/10/20	Selangor	Selangor - K Ubar	Jin Pagar	Jalan Pas, East Mela	Premium S			
33	32	24010	Wave 3, Week 33	03/10/20	03/10/20	Kedah	Kedah - A Ubar	Jalan Pag	Jalan Pag North (Per)	Marlboro G			
34	33	24010	Wave 3, Week 33	03/10/20	03/10/20	Selangor	Selangor - K Ubar	Jin Pagar	Jalan Pas, East Mela	Premium S			

10% of data entered into the database will be cross-checked by a QC personnel to ensure data accuracy and coders are capturing the data correctly

QC personnel will randomly select 10% of packs which has been keyed into the system, cross-compare to ensure pack features is similar to what has been recorded in the system and rectify the data

Besides completing a 10% physical QC check, the database is reviewed to check for data discrepancy against known facts

- E.g. Dunhill belongs to BAT M'sia ,
- Legal packs comes only in pack size of 20s

If any data discrepancies are detected, the affected pack will be extracted and a physical validation process will be undergone



ICS Research Methodology & Design

- i. ICS Universe, Sample Size
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How Does Nielsen Weight The Data?

Step 1 : Establish the Estimated Legal Industry Volume

- The **estimated legal industry volume** is established based on the following information:
 - In-market sales** as provided independently by British American Tobacco Malaysia (BATM), Philip Morris Malaysia (PMM) and Japan Tobacco International (JTI)
 - Local manufacturers' **volume** and **Malaysian Duty Free** volume from Illicit Cigarettes Study (**ICS**)

	May, 2023	
	('000 sticks)	
CMTM Member Companies (BATM, PMM, JTI)	603,106	Derive from actual in-market sales as provided by CMTM member companies
Other Local manufacturers	0	
Malaysian Duty Free	490	ICS volume estimation is used as substitute since actual data is not available
Total Legal Cigarettes Sales	603,596	

Unit of measurement : thousand sticks

How Does Nielsen Weight The Data?

Step 2 : Establish the Legal Industry Volume contribution by State

- Using in-market sales (3 months average) as provided by CMTM member companies as a guideline, **establish each states' legal volume contribution** towards the national volume of 603,596 sticks

	IN-MARKET SALES BY CMTM	STATE'S LEGAL VOLUME CONTRIBUTION
PERLIS	3,569	0.6%
KEDAH	24,627	4.2%
PENANG	42,797	7.3%
PERAK	45,626	7.7%
SELANGOR	142,907	24.3%
WP KL	68,054	11.6%
N.SEMBILAN	29,853	5.1%
MELAKA	21,312	3.6%
JOHOR	111,291	18.9%
PAHANG	26,780	4.5%
TERENGGANU	12,584	2.1%
KELANTAN	18,009	3.1%
SABAH	20,863	3.5%
SARAWAK	20,691	3.5%
NATIONAL	588,965	

Step 2a. (Using In-Market Sales)

State Legal Volume Contribution = $\frac{\text{State's In-Market Volume}}{\text{National Volume}}$
 (e.g. $142,907 / 588,965 = 24.3\%$)

	IN-MARKET SALES	STATE'S LEGAL VOLUME CONTRIBUTION	PROJECTED/ ESTIMATED STATE LEGAL VOLUME
SELANGOR	142,907	24.3%	146,458
NATIONAL	588,965		603,596

Step 2b.

Projected States Legal Volume

= State Legal Volume Contribution X National Legal Volume
 (derived from In-Market Sales) (obtained from Step 1)

(e.g. $24.3\% \times 603,596 = 146,458$)

How Does Nielsen Weight The Data?

Step 2 : Key Output

	IN-MARKET SALES BY CMTM	STATE'S LEGAL VOLUME CONTRIBUTION	PROJECTED/ ESTIMATED STATE LEGAL VOLUME
PERLIS	3,569	0.6%	3,657
KEDAH	24,627	4.2%	25,238
PENANG	42,797	7.3%	43,860
PERAK	45,626	7.7%	46,760
SELANGOR	142,907	24.3%	146,458
WP KL	68,054	11.6%	69,745
N.SEMBILAN	29,853	5.1%	30,595
MELAKA	21,312	3.6%	21,842
JOHOR	111,291	18.9%	114,056
PAHANG	26,780	4.5%	27,446
TERENGGANU	12,584	2.1%	12,897
KELANTAN	18,009	3.1%	18,457
SABAH	20,863	3.5%	21,381
SARAWAK	20,691	3.5%	21,205
NATIONAL	588,965		603,596

How Does Nielsen Weight The Data?

Step 3 : Establish the Incidence for Legal / Illegal Cigarettes

- Convert the data from **“packs collected”** to **“sticks”** (based on pack size)
- The **study’s unit of measurement** is based on consumption in **sticks**
 - Though CTPR prohibits the sales of cigarettes below the pack sizes of 20 sticks, **illegal cigarettes** (primarily for illegal kretek) could still be found **in pack sizes below 20 sticks**
 - The **calculation based on number of packs collected** will **create a false inflation** on illegal volume due to the presence of packs sizes below 20 sticks

State	Total packs collected (May'23)	Number of legal packs collected	(Unweighted) Volume of legal packs collected	Number of illegal packs collected	(Unweighted) Volume of illegal packs collected	Total volume (Legal + Illegal)	Incidence of legal cigarettes	Incidence of illegal cigarettes
			A		B	C = A + B	D = A / C	E = B / C
SELANGOR	3,200	1,690	33,800	1,510	28,624	62,424	54.1%	45.9%

Step 3a.

Sum up the number of sticks per pack for all legal packs collected to establish the estimated legal volume in sticks

Step 3b.

Repeat Step 3a to establish the estimated illegal volume in sticks

Step 3c.

Sum up the total consumption for both legal and illegal to establish The estimated total cigarette volume at state level

Step 3d.

Calculate the ratio of estimated legal vs. illegal volume

How Does Nielsen Weight The Data?

Step 3 : Incidence for Legal / Illegal Cigarettes Key Output

- Establish the level of legal vs. illegal cigarettes ratio in each respective state

State	Total packs collected (May'23)	Number of legal packs collected	(Unweighted) Volume of legal packs collected	Number of illegal packs collected	(Unweighted) Volume of illegal packs collected	Total volume (Legal + Illegal)	Incidence of legal cigarettes	Incidence of illegal cigarettes
			A		B	C = A + B	D = A / C	E = B / C
PERLIS	1,200	560	11,200	640	11,144	22,344	50.1%	49.9%
KEDAH	1,200	634	12,680	566	10,200	22,880	55.4%	44.6%
PENANG	1,200	626	12,520	574	11,063	23,583	53.1%	46.9%
PERAK	1,200	787	15,740	413	8,202	23,942	65.7%	34.3%
SELANGOR	3,200	1,690	33,800	1,510	28,624	62,424	54.1%	45.9%
WP KL	1,300	743	14,860	557	10,417	25,277	58.8%	41.2%
N.SEMBILAN	1,200	704	14,080	496	9,673	23,753	59.3%	40.7%
MELAKA	1,200	628	12,560	572	11,112	23,672	53.1%	46.9%
JOHOR	1,900	815	16,300	1,085	21,080	37,380	43.6%	56.4%
PAHANG	1,200	256	5,120	944	17,772	22,892	22.4%	77.6%
T'GANU	1,200	381	7,620	819	15,722	23,342	32.6%	67.4%
KELANTAN	1,200	586	11,720	614	11,832	23,552	49.8%	50.2%
SABAH	1,600	356	7,120	1,244	24,820	31,940	22.3%	77.7%
SARAWAK	1,600	311	6,220	1,289	24,764	30,984	20.1%	79.9%

How Does Nielsen Weight The Data?

Step 4 : Project Total Market Volume

- Once each states' estimated legal volume and legal incidence have been established, the numbers will be used to project total industry volume for each state

	STATE LEGAL VOLUME	LEGAL INCIDENCE	TOTAL MARKET VOLUME	STATE ILLEGAL VOLUME
	A	B	$C = A / B$	$D = C - A$
SELANGOR	146,458	54.1%	270,487	124,030

Step 4a.

Based on the incidence for legal cigarettes of 51.5% in Selangor, project the total volume for the state (e.g. 146,458 divide by 54..1% = 270,487)

Step 4b.

Illegal volume is established by subtracting the projected total state's volume with the legal volume (e.g. 270,487 – 146,458 = 124,030)

How Does Nielsen Weight The Data?

Step 4 : Key Output - Illegal Cigarettes Incidence @ National level

- Repeat the same process in Step 4 for all States

	STATE LEGAL VOLUME	LEGAL INCIDENCE	TOTAL MARKET VOLUME	STATE ILLEGAL VOLUME
PERLIS	3,657	50.1%	7,296	3,639
KEDAH	25,238	55.4%	45,541	20,302
PENANG	43,860	53.1%	82,616	38,756
PERAK	46,760	65.7%	71,126	24,366
SELANGOR	146,458	54.1%	270,487	124,030
WP KL	69,745	58.8%	118,637	48,892
N.SEMBILAN	30,595	59.3%	51,614	21,019
MELAKA	21,842	53.1%	41,166	19,324
JOHOR	114,056	43.6%	261,560	147,503
PAHANG	27,446	22.4%	122,712	95,267
TERENGGANU	12,897	32.6%	39,507	26,610
KELANTAN	18,457	49.8%	37,090	18,633
SABAH	21,381	22.3%	95,916	74,534
SARAWAK	21,205	20.1%	105,628	84,423
NATIONAL	603,596		1,350,894	747,298

Divide **National Illegal Volume 747,298** with **National Total Market Volume 1,350,894** **55.3%**



About NielsenIQ

Arthur C. Nielsen, who founded Nielsen in 1923, is the original name in consumer intelligence. After decades of helping companies look to the future, we are setting the foundation for our future by becoming NielsenIQ. We continue to be the undisputed industry leaders as evidenced by our experience and unmatched integrity. As we move forward, we are focused on providing the best retail and consumer data platform, enabling better innovation, faster delivery, and bolder decision-making. We are unwavering in our commitment to these ideals and passionate about helping clients achieve success. For more information, visit: niq.com