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The globalisation strategies of five Asian tobacco companies: An analytical framework

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INTRODUCTION



The globalisation strategies of five Asian tobacco companies: An analytical framework

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ABSTRACT

With 30% of the world's smokers, two million deaths annually from tobacco use, and rising levels of tobacco consumption, the Asian region is recognised as central to the future of global tobacco control. There is less understanding, however, of how Asian tobacco companies with regional and global aspirations are contributing to the global burden of tobacco-related disease and death. This introductory article sets out the background and rationale for this special issue on 'The Emergence of Asian Tobacco Companies: Implications for Global Health Governance'. The article discusses the core questions to be addressed and presents an analytical framework for assessing the globalisation strategies of Asian tobacco firms. The article also discusses the selection of the five case studies, namely as independent companies in Asia which have demonstrated concerted ambitions to be a major player in the world market.

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Asia; tobacco control; globalisation; tobacco industry; transnational tobacco companies

Introduction

The accelerated globalisation of tobacco production and consumption over the past half century has been widely recognised (Yach & Bettcher, 1999, 2000). From the acquisition of foreign manufacturing and diversification of holdings from the 1960s, by the U.S. firms facing a shrinking domestic market (Shepherd, 1985), to the spread of transnational tobacco companies (TTCs) into emerging markets in Eastern Europe, Asia and the Middle East from the 1980s (Connolly, 1991; Gilmore & McKee, 2004), to market consolidation by TTCs from 50% (2001) to 84% (2014) through mergers and acquisitions (M&As) (Campaign for Tobacco Free Kids, 2015; Hammond, 1998), the tobacco industry has undergone significant transformation. TTCs operate in more than 180 countries (Yach, Wipfli, Hammond, & Glantz, 2006), with annual turnover increasing from US \$400 billion in the late 1990s (Yach & Bettcher, 2000) to US\$722 billion by 2013 (Campaign for Tobacco Free Kids, 2015). The WHO framework convention on tobacco control (FCTC) is premised on recognition that, along with local and national-level

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efforts, tobacco control in a globalised world needs effective collective action across countries (Roemer, Taylor, & Lariviere, 2005).

Research on the globalisation of the tobacco industry to date has focused on the four leading TTCs – Philip Morris (PM), British American Tobacco (BAT), Japan Tobacco International (JTI) and Imperial Tobacco. Hogg, Hill, and Collin (2016) write that limited attention so far has been paid to state-owned tobacco companies (SOTCs) which remain the principal cigarette manufacturer in 16 countries. SOTCs account for around half of the global market, dominated by the China National Tobacco Corporation (CNTC) with 43% of the global market in 2014 (Campaign for Tobacco Free Kids, 2015). Hogg et al. (2016, p. 370) write that

the comparative dearth of academic literature focused on SOTCs is indicative of a broader neglect of their strategic significance and potential ... There is a clear need for investigation of specific mechanisms by which it may be possible to reprogramme SOTCs to act in the interests of health.

Moreover, the conceptualisation and empirical analysis of tobacco industry globalisation in the public health literature remains limited (Lee, Eckhardt, & Holden, 2016).

This article, and the accompanying collection of case studies on five Asian tobacco companies, seeks to address this neglect in two respects. First, with two million tobacco-related deaths annually and rising levels of consumption (Zheng et al., 2014), the Asian region¹ is central to the future of global tobacco control. TTC targeting of Asia, given its large populations, growing affluence and large proportion (30%) of the world's smokers, has been analysed elsewhere (Lee et al., 2008). With the exception of JTI (Assunta & Chapman, 2004, 2006; Iida & Proctor, 2004; Jarman, 2014; Joosens & Gilmore, 2014), there has been limited study to date of how Asian tobacco companies have been affected by, and have adapted to, globalisation.

Second, a fuller understanding of the extent to which Asian tobacco companies are globalising their operations, and seeking to compete in the world market, has important implications for public health and global health governance. Asian firms in other industries – notably electronics, automobiles and household appliances – have become major players in the world economy over the past four decades. While local (e.g. property and utilities) and niche (e.g. rice crackers) industries are likely to remain domestically or regionally focused, products with universal appeal (like cigarettes) must globalise or fall by the wayside (The Economist, 2014). If Asian tobacco companies successfully globalise, increasing competition for world markets, increased consumption may result from the introduction of new brands and product innovation, intensified direct and indirect marketing, and downward pressures on price. Effective responses by the public health community to strengthen tobacco control, aimed at stemming current trends towards 10 million deaths annually from tobacco use by 2030, and achieving progress towards an 'endgame' (Warner, 2013) requires fuller understanding of the changing structure of the industry in coming decades.

This special issue addresses the shortcomings in the existing literature by conducting case studies on tobacco companies in five Asian countries at varying stages of globalisation: Japan, South Korea, China, Taiwan and Thailand. We begin by describing the analytical framework for understanding the factors behind each company's chosen business strategy, the specific globalisation strategies pursued and the extent to which they have been achieved to date. We then set out the rationale for selecting the five case studies. We conclude with reflections on the methodology adopted by each case study.

Tobacco industry globalisation: an analytical framework

While tobacco industry globalisation has been widely observed since the 1990s, there has been limited analysis of the business strategies of individual firms, and the degree to which globalisation has been achieved by different companies to date (Lee et al., 2016). This special issue takes, as a starting point, that a deeper understanding of the globalisation of the tobacco industry, as a prerequisite to effective global governance, requires fuller explanation of its causal relationships to the world economy, historical context, distinct global nature and variation by firm and geography. To this end, as Lee et al. (2016, p. 6) put it,

[m]ore precise indicators are needed to measure tobacco industry globalization. Rather than describing globalization as binary in occurrence, uniform across the industry, or linear in its trajectory, globalization can be studied as a process that is happening to varying degrees in different parts of the industry, at different geographical locations, with diverse features and varying impacts on production and consumption.

In order to better measure tobacco industry globalisation, we first need a more concise definition of globalisation. Most of the public health literature sees globalisation ‘as the expanded capacity by the tobacco industry to assert influence, operate, and secure economic gains, over a wider geographical territory’ (Lee et al., 2016). Yet, what needs further explanation is how this has been achieved, what strategies have been pursued by specific firms, how has this changed the way firms functionally operate and how the tobacco industry as a whole is structured. Is this really new or different than before and, if so, do we need new types of collective action to govern its trajectory and impacts?

In this special issue, we adopt the distinction made by Dicken (2011, p. 7) between ‘internationalisation’ and ‘globalisation’. Internationalisation involves the ‘simple geographical spread of economic activities across national boundaries with low levels of functional integration’. Globalisation processes are qualitatively different as they involve ‘both extensive geographical spread and also a high degree of functional integration’ (Dicken, 2011, p. 7). By functional integration, Dicken (2011) means the practice by transnational companies of fragmenting many of their production processes, and then geographically relocating them across national boundaries according to a global logic of operation. This contrasts with multinational companies which seek to wholly replicate production processes, carried out in the home country, in a subsidiary located abroad. Similarly, Scholte writes that globalisation concerns phenomena with worldwide reach (transplanetary) and/or disregard for physical geography (supraterritorial):

[T]his conception of globalisation has a distinctive focus. It is different from ideas of internationalisation, liberalisation, universalisation and westernisation. The trans-territorial connections of globality are different from the inter-territorial connections of internationality. The transborder transactions of globality are different from the open-border transactions of liberality. The transplanetary simultaneity and instantaneity of supraterritoriality is different from the worldwideness of universality. The geographical focus of globality is different from the cultural focus of western modernity. (Scholte, 2008, p. 1499)

In this sense, both internationalisation and globalisation co-exist in the emerging ‘new geo-economy’. As Dicken (2011, p. 8) writes, they ‘[operate very unevenly in both time and space. As a result of these processes, the nature and degree of interconnectedness between different parts of the world is continuously in flux’. These definitional distinctions are more fully set out in Lee et al. (2016).

To assess globalisation strategies within the tobacco industry, and measure the degree to which this has been achieved, we propose to focus on three key questions: (a) what are the primary factors behind the push for globalisation?; (b) what are the specific globalisation strategies pursued?; and (c) to what extent has the industry as a whole, or the specific company in question, globalised to date? For each of these questions, the business literature offers useful indicators that provide a fuller framework for analysis. The authors in this special issue apply this framework to analysis of the five selected Asian tobacco companies as potentially emerging TTCs.

Determinants of globalisation over time

Since the publication of *The globalization of markets* (Levitt, 1983), a lively debate has developed in the business literature on the relationship between the globalisation of markets and firm strategy (for a good overview of this literature see Ghobadian, Rugman, & Tung, 2014). The conventional view is that, with the growth of globalisation, in principal, it is possible and desirable for firms to pursue a global business strategy. In general, firms adopt such a strategy to expand their long-term profitability. When it comes to identifying the factors that may underlie a company's decision to 'go global', we rely on the seminal work by Dunning (1977), and Dunning and Lundan (2008a, 2008b). This literature identifies four general reasons why a firm may pursue a global business strategy (Dunning & Lundan, 2008a, pp. 67–74; see also Yip, 1989). First, the firm may be a 'natural resource seeker' and seek to acquire certain resources of a better quality or at a lower price than could be found in the home country. Second, the firm may be a 'market seeker' and wish to expand the sale of goods and services beyond the domestic market. Third, the firm may be an 'efficiency seeker' that wants 'to take advantage of different factor endowments, cultures, institutional arrangements, demand patterns, economic policies and market structures by concentrating production in a limited number of locations to supply multiple markets'. Fourth, the firm may be a 'strategic asset seeker' and thus seek to invest in foreign assets in order to sustain or advance its global competitiveness. Firms will vary in the specific reasons motivating them, and may choose to adopt a global business strategy for more than one of these reasons.

Besides identifying these general reasons why a company may wish to 'go global', Dunning and colleagues have also identified three more specific potential sources of advantage of a transnational over a domestically oriented business strategy. This approach has become known as the ownership, location and internalisation (OLI) approach. On ownership, firms with above average levels of assets – such as cash, investments, inventory, supplies, land, buildings, equipment and vehicles – are more likely to adopt a transnational strategy. This is because, the more assets a company has at its disposal, the more these assets can be used to produce 'at different locations without reducing their effectiveness' (Neary, 2008). Firms differ in their level of productivity which, in turn, determines their chosen strategy. Firms with lower productivity produce solely for the domestic market. Firms with medium productivity can pay the higher fixed costs of exporting their products abroad. Only firms with high productivity can engage in a global strategy including foreign asset ownership. On location, firms locating production facilities abroad, or investing in foreign facilities through M&As, can be motivated by a desire to gain better and/or cheaper access to foreign markets or reduce production costs. On internalisation, this

concerns a firm's 'propensity to internalize cross-border structural or endemic imperfections in the intermediate goods market' (Dunning & Lundan, 2008b, p. 587).

Alongside internal factors, external or institutional factors can drive global business strategy. North (1994, p. 360) defines institutions as the formal (e.g. laws and constitutions), and informal (e.g. norms of behaviour, conventions and self-imposed codes of conduct) rules, and their enforcement characteristics, which together 'define the incentive structure of ... economies'. These 'rules of the game' determine, to an important extent, decisions by firms to adopt a global strategy or not. Three institutional factors are particularly relevant to the tobacco industry: (a) market conditions (e.g. degree of openness, competition, WTO accession, preferential trade agreements, bilateral investment treaties); (b) government conditions involving the state system (e.g. state ownership in whole or part), and regulatory environment for tobacco control (e.g. accession to and implementation of the FCTC, taxation levels, marketing restrictions); and (c) cultural values and norms (e.g. public attitudes towards tobacco use and public health information campaigns).

Importantly, not all firms interested in advancing their future profitability will pursue a global strategy. Many firms may not be able, or deliberately choose not, to 'go global' and, instead, engage in economic activities which might be labelled semi-globalisation. In that case, firms may initially focus on expanding their business activities regionally and, if successful and desirable, may expand their operations to countries outside the region at a later stage. That is, globalisation of parts of the tobacco industry can vary over time (Lee et al., 2016). First, there can be non-globalisation whereby a firm focuses attention solely on the domestic market. We classify such tobacco firms, with a purely national orientation, as *domestic tobacco companies*. Second, where a firm is active in regional markets, in addition to the domestic market, there is a strategy of semi-globalisation. For example, firms may initially focus on expanding their business activities regionally and, if successful and desirable, expand operations further afield at a later stage. Regional strategies should thus be viewed, in this sense, as a complement, rather than alternative, to strategies focused on the domestic market. Tobacco firms with this orientation can be classified as *regional tobacco companies*. Third, where a firm is active domestically, regionally and beyond, these firms can be classified as TTCs. This suggests a more sophisticated conceptualisation where domestic, regional and global business strategies can be closely interconnected and impact upon each other. Firms may pursue distinct combinations of the three strategies, and thus different forms of domestic, regional and global strategies may be observed depending on the particular configuration or balance pursued by a firm (Lee et al., 2016).

Specific global business strategies pursued

There are a range of business strategies tobacco firms may pursue to globalise. The most direct is to export tobacco products directly to foreign markets which, in its most basic form, entails 'the sale of products made by entrepreneurial firms in their home country to customers in other countries' (Peng, 2009, p. 299). Another is to license brands in foreign markets for production, in which case, a domestic firm A (the licensor) and a foreign firm B (the licensee) agree that B has the right to use A's (patented) technology or trademark (e.g. its logo) in return for a royalty fee (or other form of payment) paid by B to A. If a firm wants to have more control over its foreign operations, and be 'physically and psychologically closer to foreign customers', firms can also become more directly involved in overseas markets by

means of foreign direct investments (FDI) (Peng, 2009, p. 300). FDI may involve: (a) starting up a wholly 'new venture in a country abroad by constructing new operational facilities from the ground up' (i.e. greenfield investments); (b) setting up strategic alliances with foreign firms like a joint venture; or (c) acquiring or merging with a foreign company. TTCs have deployed each of these strategies in various contexts, most often with a preference for the acquisition of domestic companies in targeted markets (Lee, Holden, & Lee, 2013; Shepherd, 1985). Importantly, initial work suggests that the national economic development models of particular countries seem to influence the chosen market entry strategy of TTCs, indicating that national-level structures still matter for patterns of globalisation (Lee et al., 2013).

There are also other, interrelated, strategies tobacco companies may pursue in their attempts to globalise. One such strategy is to hire foreign expertise (e.g. executives, consultants and management) in order to gain specialist knowledge and skills about, for example, tobacco production and distribution, or specific foreign markets or regulatory regimes. Moreover, firms may adapt or develop new products, and/or engage in a process of consolidation and restructuring of their operations, in order to be more competitive in multiple national markets. Firms may also get involved in particular marketing, advertising and sponsorship activities to establish or increase brand recognition abroad. Corporate social responsibility (CSR) initiatives, for instance, have become particularly popular among tobacco firms since the 1990s. The 1990s

were a decade full of "negative surprises" for the tobacco industry ... [with] multiplying law suits, discovery and release of millions of pages of internal company documents, increasing restrictions on public smoking, legislative investigations, and growing political pressures to regulate the industry. (Hirschhorn, 2004, pp. 449–450)

Tobacco firms seeking globalisation discovered CSR as an effective public relations tool in order to regain the goodwill of policy-makers and the general public (Fooks et al., 2011), as well as 'to stave off anti-corporate attacks' (Hirschhorn, 2004, pp. 449–450). Finally, in their attempt to increase foreign market presence and brand recognition, firms may become involved in the illicit tobacco trade (Collin, LeGresley, MacKenzie, Lawrence, & Lee, 2004; Lee & Collin, 2006; Lee et al., 2008; LeGresley et al., 2008).

Measuring the degree of globalisation

The degree to which the tobacco industry, and particular firms within it, has achieved globalisation can be measured by several indicators (for an in-depth discussion see Lee et al., 2016). First, regional and global exports can be measured in volume (millions of sticks or packs) and geographical distribution. The latter can be difficult to track accurately, given that tobacco products often pass through many jurisdictions before being sold in their market of final destination. Second, FDI, by volume and purpose, can be assessed to understand the type of investment activities of a company. The higher the levels of regional and global FDI (in US\$ million), and the more countries where these investments are made, the more the company might be considered as globalising. The FDI by more globalised firms might seek to restructure and redistribute its production chain, build new manufacturing plants abroad or establish leaf growing and processing concerns. Third, national, regional and global M&As, and their geographical distribution, indicate a higher degree of globalisation. More globalised firms may seek greater levels of vertical or horizontal integration.

Fourth, foreign earned revenues, or foreign nationals among employees, as a proportion of total revenues and employees can be used as indicators of a firm's globalisation. Fifth, the larger the share of total revenues or sales volume in a foreign market, the more globalised a company might be. Finally, the United Nations Conference on Trade and Development (UNCTAD) provides an 'internationalisation index' for the world's top 100 non-financial TNCs, calculated as the number of (majority-owned) foreign affiliates divided by the number of all affiliates (UNCTAD, 2015). Indicators of the kind outlined above can also be combined into a composite index. For example, UNCTAD (2015) compiles a 'transnationality index' for its annual *World investment report*, calculated as the average of three ratios: foreign assets to total assets; foreign sales to total sales; and foreign employment to total employment. This measure has already been applied to tobacco companies to compare TTCs to each other, and to firms in other sectors (Hawkins, Holden, Eckhardt, & Lee, 2016; Holden and Lee, 2009).

Selection of case studies

The five case studies are chosen, first, because they are companies not already owned by the four leading TTCs, in whole or in part. In countries such as India, Singapore, Malaysia and increasingly Indonesia, TTCs own the largest tobacco companies in operation, either as subsidiaries or joint ventures. As such, they are excluded because aspirations to globalise would be extensions of the strategies of existing TTCs. Second, companies such as the Vietnamese monopoly Vinataba are excluded because they remain primarily focused on domestic markets and do not have explicit aspirations for foreign expansion. Instead, we focus on Asian companies that have expressed ambitions to become, or in the case of JTI that have already achieved the status of a TTC.

Japan Tobacco International

As one of the world's largest TTCs, there is much to be learned from JTI's global business strategy. Initially a state-owned monopoly, which was then privatised in the 1980s with the government retaining around 50% of holdings, parent company Japan Tobacco (JT) formed JTI in 1999 to create a 'profit growth engine'. JT's pursuit of a global expansion strategy since the 1980s was in response to market opening, foreign competition and declining share of a contracting domestic market. Beginning with the purchase of the non-American business of RJ Reynolds, JTI grew rapidly through foreign acquisitions, licensing agreements and joint ventures. This was accompanied by large-scale new product development. With headquarters in Geneva and 26,000 employees worldwide, in 2015 JTI reported operations in 120 countries. MacKenzie, Eckhardt, and Prastyani (2017) analyse JTI's successful strategy to become one of the world's leading TTCs.

Korean Tobacco and Gingseng (KT&G)

The Korean company KT&G (previously known as Korean Tobacco and Gingseng) has origins dating from 1899. It became a state-owned monopoly in 1908 and remained so until privatisation was completed in 2002. Lee, Gong, Eckhardt, Holden, and Lee (2017) analyse the company's changing, and increasingly outward looking, strategy since market

opening in the early 1990s. Today, the company describes itself as ‘growing into a global giant ... by leaping into the world market beyond Korea’ (KT&G, 2015). It exports around 100 brands to 50 countries, with overseas subsidiaries and plants in the U.S., Russia, China, Indonesia, Turkey and Iran.

China National Tobacco Corporation

The CNTC is the world’s largest tobacco company, supplying a huge domestic market of 300 million smokers, as a state-owned monopoly. The industry generates 7–11% of all tax revenues in China along with huge profits. Since China’s accession to the WTO in 2001, the tobacco industry has undergone substantial reorganisation, including consolidation of domestic operations. While this has been attributed to a desire to protect the domestic market from foreign competition, Fang, Lee, and Sejpal (2016) analyse the aspirations and efforts to date by the CNTC to ‘Go Global’.

Taiwan Tobacco and Liquor Corporation (TTL)

The TTL is a state-owned company and distributor of cigarettes and alcohol. Established as a government agency during Japanese colonial rule, it was renamed by the Taiwan Tobacco and Wine Monopoly Bureau in 1947. Until 1968 the Bureau exercised a monopoly over all alcohol, tobacco and camphor products sold in Taiwan. It retained tobacco and alcohol monopolies until Taiwan’s accession to the WTO in 2002. In 2002 the Monopoly Bureau gave way to its successor, the TTL. Eckhardt, Fang, and Lee (2017) examine the changes that have taken place since 2002 amid declared ambitions by TTL to become a global company.

Thailand Tobacco Monopoly (TTM)

The TTM is a state-owned company which holds a monopoly over the manufacturing and distribution of tobacco products. TTM was established in 1939, initially in collaboration with BAT but, since 1949, the company has operated under the Ministry of Finance. The resolution of a trade dispute in 1990 over the importation and internal taxation of cigarettes, filed by the U.S. government under the General Agreement on Tariffs and Trade, followed in 1992 by an agreement to create an ASEAN Free Trade Area, opened up the domestic Thai tobacco market. MacKenzie, Ross, and Lee (2017) analyse the TTM’s response to these changes and, in particular, the company’s aspirations to expand its reach abroad.

Methodology

All case studies in this special issue begin with a review of the existing scholarly, industry and policy literature on the specific company, drawing from a wide array of data sources, to understand what is already known about their business strategies. To this end, authors searched for scholarly papers across multiple disciplines (i.e. public health, business studies, and social sciences) as secondary sources in databases such as JSTOR, SAGE, PLOS journals and Google Scholar, by means of a technique called ‘reference harvesting’. Other useful sources of secondary data were relevant governmental bodies (national,

regional and multilateral), the business and financial media and market reports from such research firms as *Euromonitor* (<http://www.euromonitor.com/>).

Authors then searched the websites of the five Asian tobacco companies for primary data on their business strategies. The English language versions of the websites, along with the Chinese, Korean, Japanese and Thai language websites, were searched for annual reports, statements, speeches and documents on company plans and corporate governance. The internal industry documents of the Truth Tobacco Industry Documents (<https://www.industrydocumentslibrary.ucsf.edu/tobacco/>) collection relevant to the five Asian companies were searched using keywords, such as the country name, ‘globali*ation’ and ‘strategy’. While the vast majority of these documents relate to PM, BAT, RJ Reynolds and other defendants in the U.S. litigation from which most of these documents derived, the authors searched the documents for information relevant to the five Asian companies as potential competitors to established TTCs. The strengths and limitations of internal tobacco industry documents, as a source of research data, are described in Carter (2005).

Finally, in order to gather additional data for indicators in the above described analytical framework, and preferably over time, authors drew upon the relevant databases listed in **Box 1**. For some of the indicators, it proved difficult to find systematic, comprehensive or longitudinal data.

Box 1. Data sources used for (economic) indicators.

- Food and Agriculture Organization of the UN (fao.org/statistics)
- Statistics on, for example, agriculture, forestry and fisheries, land and water resources and use, climate, environment, population, gender, nutrition, poverty, rural development, education and health.
- International monetary fund (IMF) (imf.org/external/data)
- A range of time series data on IMF lending, exchange rates and other economic and financial indicators.
- International Trade Center (intracen.org/ltc/market-info-tools/overview)
- Several databases on trade, market access (e.g. tariffs, official market regulations and other non-tariff measures), investment, competitiveness and standards.
- Lexis-Nexis media reports/news (lexisnexis.com/hottopics/lnacademic)
- Collection of national and international news sources and company information such as annual and financial reports.
- Tobacco Asia (tobaccoasia.com)
- Information on developments and issues related to production (e.g. equipment, machinery, supplies, services and tobacco leaf), distribution and retailing in the Asian tobacco industry.
- Tobacco Journal International (tobaccojournal.com)
- Information on trends and developments in all segments of the global tobacco industry.
- Tobacco Reporter (tobaccoreporter.com)
- News and reports on the tobacco industry, as well company information such as personnel info, mailing addresses, phone and fax numbers and detailed product/service information.
- United Nations COMTRADE database (comtrade.un.org)
- Official annual (since 1962) and monthly (since 2010) trade statistics and relevant analytical tables.
- United Nations Conference on Trade and Development (unctadstat.unctad.org)
- Economic statistics (on 150 indicators, over time and by country) on issues like trade, economic trends, FDI, external financial resources, population and labour force.
- United Nations Industrial Development Organization (stat.unido.org)
- Statistics of overall industrial growth, detailed data on business structure and statistics on major indicators of industrial performance by country.
- World Bank (databank.worldbank.org/data/home.aspx)
- Collections of time series data on indicators such as GDP, FDI, inflation, trade flows and so on for a wide array of countries.
- World Trade Organization (stat.wto.org/Home/WSDBHome.aspx)
- Trade profiles of WTO members, observers and other selected economies, with detailed statistics on, for example, trade flows and market access.

Conclusion

This special issue applies the analytical framework, described above, to the five Asian tobacco companies to understand the determinants shaping their pursuit of globalisation, what global business strategies each has pursued and the extent to which they have achieved globalisation to date. The findings from the five case studies are comparatively brought together in the final paper by Lee and Eckhardt (2017), in relation to the three questions posed, as well as the future implications raised for global tobacco control.

Note

1. Zheng et al. (2014) use data from 21 cohorts spanning countries in East, Southeast and South Asia.

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