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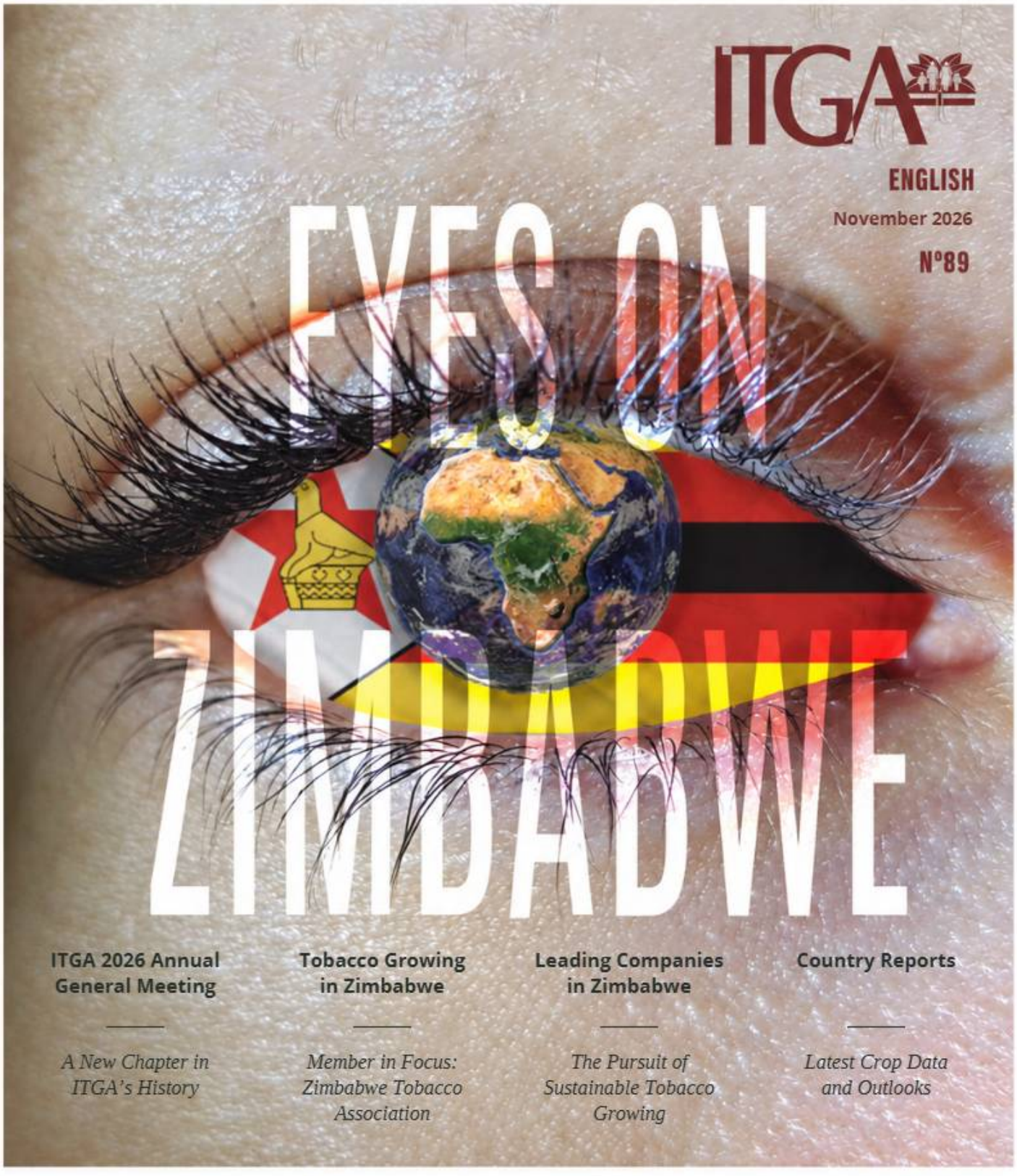

ITGA

ENGLISH
November 2026
N°89

EYES ON ZIMBABWE

ITGA 2026 Annual General Meeting

A New Chapter in ITGA's History

Tobacco Growing in Zimbabwe

Member in Focus: Zimbabwe Tobacco Association

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Index

COMMENTS ITGA 4

4 ITGA Members Participating In This Issue
5 President's Address
7 ITGA 2026 Annual General Meeting
62 World Tobacco Growers' Day in Photos

ZIMBABWE FOCUS 10

10 Focus Market: Zimbabwe
11 Zimbabwe's Socio-Economic Footprint
12 Tobacco Growing in Zimbabwe
13 ZTA: Milestones and Objectives
16 Africa Regional Meeting in Harare
17 Africa's Tobacco Sector
20 TLEAZ: Sustainability and Governance
22 Curverid: From Seedbeds to Curing Barns
26 Alliance One: Nine Decades in Zimbabwe

COUNTRY REPORTS 30

AFRICA

31 Zimbabwe
34 Zambia
37 Malawi
39 Tanzania

AMERICAS

43 Brazil
46 United States
48 Argentina
50 Colombia
52 Dominican Republic

ASIA & EUROPE

56 India
58 Bulgaria
60 North Macedonia



ITGA FOUNDATION, 1984

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ITGA Members Participating in this Issue

Grower perspectives from Africa, the Americas, Asia and Europe.



AFRICA

1 Zimbabwe
Zimbabwe Tobacco Association (ZTA)

2 Zambia
Tobacco Association of Zambia (TAZ)

3 Malawi
TAMA Farmers Trust; Agricultural Research and Extension Trust (ARET)

4 Tanzania
Tobacco Cooperative Joint Enterprises (TCJE)

AMERICAS

5 Brazil
Afubra

6 United States
Tobacco Growers Association of North Carolina (TGANC); Burley Stabilization Corporation (BSC)

7 Argentina
Cooperativa de Productores Tabacaleros de Salta Ltda. (COPROTAB); Cooperativa Agroindustrial de Misiones Limitada (CTM); Cooperativa de Tabacaleros de Jujuy (CTJ)

8 Colombia
Fedetabaco

9 Dominican Republic
Intabaco

ASIA & EUROPE

10 India
Tobacco Institute of India (TII)

11 Bulgaria
NAT2010

12 North Macedonia
Union of Tobacco Producers - Maka na Tutunoberacite, Prilep

MESSAGE FROM THE PRESIDENT

International Tobacco Growers' Association
Echoing Tobacco Growers' Voices since 1984

Marcílio Laurindo Drescher
ITGA President

The grower's voice must be respected

Taking on the presidency of the International Tobacco Growers' Association (ITGA) is an honor, but above all, it is a great responsibility. Representing tobacco growers means standing up for thousands of families who make their living from their work, understand the realities of farming, and have the right to be heard in decisions that directly affect their future.

Tobacco has been grown for decades in different countries and continues to hold enormous economic and social importance for many regions. The vast majority are small-scale farmers who work on their own properties, generate income, support local communities, and make a significant contribution to their countries' economies.

Even so, growers are often treated as part of the problem, when they should be recognized as an essential part of a legal, organized, and economically significant supply chain.

This is a reality we need to confront.

In some countries, governments recognize the importance of family farming and tobacco production, support their farmers, and create conditions that allow them to continue working and developing their livelihoods. In others, however, increasingly restrictive measures are being introduced that ultimately penalize those at the very foundation of the supply chain: the grower.

We cannot accept farmers being stigmatized, facing difficulties in accessing credit, or being pushed to the margins simply because of the crop they have chosen to grow.

Defending growers does not mean ignoring the debates surrounding the consumption of tobacco products. These are different issues and must be treated as such. Farmers grow a legal agricultural crop, in accordance with the laws and regulations of their countries, and they deserve respect, recognition, and fair conditions in which to carry out their work.

It was with this purpose that, 42 years ago, organizations from different countries came together to establish the ITGA. Since then, more countries have joined this journey, strengthening an international organization with a very clear mission: to ensure that the grower's voice is heard wherever decisions are made.

This is the work we want to strengthen over the next two years.

In Brazil, we know this reality very well. We produce high-quality tobacco that is exported to more than 100 countries, supporting a supply chain that generates income, jobs, foreign-exchange earnings, and regional development. Even so, for many years we have faced challenges, misunderstandings, and attempts to impose restrictions that directly affect tobacco-growing families.

That is why we must remain united.

Every grower should stay close to their representative organization. Every organization must be prepared to stand up for its farmers. And every government needs to understand that decisions made without listening to those who work in the fields can have profound consequences for thousands of families.

Our position is clear: we stand for sustainability, responsibility, fair remuneration, and, above all, freedom. The freedom for farmers to decide what to grow on their own land, within the law and in accordance with established regulations.

The challenges will continue. But the ITGA will remain present, firm, and active.

As long as there are growers who depend on this activity to support their families, there will also be a need for representation, dialogue, and advocacy.

The struggle continues. And the grower's voice cannot be ignored.

"Every grower should stay close to their representative organization."



Marcílio Laurindo Drescher, ITGA President. Photograph supplied by Afubra.

A new chapter in ITGA's history

ITGA 2026 Annual General Meeting | Dortmund, Germany



Outgoing President José Javier Aranda and newly elected President Marcílio Drescher.

DORTMUND, GERMANY, 17 SEPTEMBER 2026 - The International Tobacco Growers' Association (ITGA), the global association representing tobacco grower organizations and providing a collective voice for farming communities in international sector discussions, concluded its 2026 Annual General Meeting at Messe Dortmund, Germany, during InterTabac, bringing together representatives of tobacco-growing communities, grower organizations and sector stakeholders from key producing regions.

The meeting also marked an important leadership transition for the Association, with Marcílio Drescher, President of Afubra, Brazil, confirmed as the newly elected President of ITGA during the Closed Session on 17 September 2026, succeeding José Javier Aranda.

The transition opens a new chapter for ITGA as the Association builds on a year of stronger partnerships, renewed engagement with members, expanded regional coordination and continued work to ensure that tobacco growers' realities are part of discussions affecting the sector.

"ITGA has built a strong legacy over 42 years, and the progress achieved under José Javier Aranda's leadership gives us a solid foundation for the next chapter. We now have an opportunity to build on this momentum by strengthening the voice of growers, improving their economic viability and ensuring the long-term sustainability of tobacco-growing communities around the world," said Marcílio Drescher, newly elected President of ITGA.

During the meeting, ITGA members recognized José Javier Aranda's four-year presidency and his contribution to leaving the Association stronger, more coordinated and better positioned to represent tobacco growers internationally.

His mandate was marked by renewed advocacy engagement, stronger coordination in the Americas, participation in key international regulatory processes, support for the EU Tobacco Products Directive work, continued engagement with African growers and a clear emphasis on ensuring that growers' voices are heard in decisions affecting the sector.

"Each of our members has a responsibility to drive effective advocacy in their own country - advocacy that helps improve growers' incomes and ensures governments better understand the realities and challenges of tobacco growing, so they are better equipped to defend the sector against the continued pressures it faces," said José Javier Aranda, outgoing President of ITGA.

A stronger, more coordinated voice



ITGA members and stakeholders at the Annual General Meeting in Dortmund.

The 2026 Annual General Meeting took place against a backdrop of changing market dynamics, pressure on grower prices, continued regulatory scrutiny and rising expectations around sustainability, traceability and living income. ITGA's work in 2026 has highlighted renewed partner engagement, new and reconnected members, stronger cooperation with InterTabac and InterSupply, an Americas Regional Meeting that laid the foundations for stronger coordination among members and a more unified approach to advocacy across the region, continued regional momentum in Africa, and living income research involving more than 700 growers.

Market outlook, livelihoods and sustainability

Discussions examined the implications of these developments for tobacco growers and producer organizations, with a focus on market outlook and developments in global leaf production; economic sustainability and grower livelihoods; regulatory developments affecting tobacco-producing countries; traceability, environmental stewardship and due diligence; changing demand and global nicotine-consumption trends; and regional advocacy coordination and the role of grower organizations in international dialogue.

"Taken together, the achievements of 2026 so far - stronger partnerships, renewed engagement, new and reconnected members, stronger coordination across the Americas, the successful Africa Regional Meeting and the extensive work to understand growers' living income - demonstrate that ITGA is moving forward with a stronger and more coordinated voice," said Mercedes Vázquez, ITGA CEO.

Representatives from key tobacco-producing regions participated in the meeting, including grower organizations and stakeholders from Argentina, Brazil, Bulgaria, Colombia, India, Malawi, North Macedonia, the Philippines, United States, Zambia, and Zimbabwe. Their participation reflected the diversity of the global tobacco-growing community and the different economic, agricultural and policy contexts in which growers operate.

ITGA emphasized that international discussions affecting tobacco agriculture should be informed by evidence, practical experience and direct engagement with producer organizations.

Three priorities for the next mandate

In his first address as President, Drescher built on the Association's recent momentum and outlined three broad priorities for the next mandate:

Grower voice and influence: ensuring tobacco growers and their representative organizations have a meaningful voice in discussions and decisions affecting their future.

Economic viability and living income: advancing understanding of growers' economic realities and supporting the long-term viability of tobacco-growing communities.

Long-term sustainability: helping growers prepare for evolving market, regulatory, sustainability and traceability expectations.

ITGA will continue working with its member organizations and stakeholders to strengthen growers' representation, support informed dialogue and ensure that tobacco-producing communities have a meaningful voice in decisions affecting their future.

The 2026 Annual General Meeting reaffirmed ITGA's role as an international platform for tobacco growers and provided a forum for members to exchange perspectives, assess emerging challenges and define priorities for the Association's next stage.


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Eyes on Zimbabwe



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Source: Zimbabwe Tobacco Association (ZTA); UN Comtrade; WTO

Tobacco Growing in Zimbabwe

Zimbabwe Tobacco Association | Representing growers since 1928

Commercial tobacco growing took root in what is now Zimbabwe in the late 19th century, when British settlers began cultivating leaf for markets in Europe and North America. By the 1920s, production was expanding rapidly in Mashonaland, where the climate and soils suited flue-cured Virginia. As more leaf came to market, growers wanted a say in how it was researched and sold. In 1928 they formed a tobacco growers association.

From the research station to the auction floor

The association's advocacy helped establish the Tobacco Research Station at Trelawney in 1934. Two years later, the introduction of auction floors gave growers and buyers an organised market for leaf. The Tobacco Research Act of 1938 established a statutory board to oversee research. By the middle of the century, the country had become one of the world's leading tobacco producers.

Independence and international representation

After independence in 1980, the association took the name Zimbabwe Tobacco Association (ZTA). Large-scale commercial farms still dominated production, and tobacco remained a major source of foreign currency. In 1984, ZTA became a founding member of the International Tobacco Growers' Association (ITGA), giving Zimbabwean growers a forum in which to raise shared concerns with producers abroad.

Smallholders reshape the industry

In the early 2000s, fast-track land reform redistributed land, leading to an increase in smallholder tobacco farmers. Tobacco output initially fell. As production recovered, small-scale farmers came to account for more than 60% of the national crop by the 2010s. ZTA adapted its work to this changing grower base through extension services, field days and links to research institutes. District councillors brought growers' concerns into national policy discussions.

Zimbabwe is Africa's largest tobacco producer, and tobacco is its leading agricultural export. ZTA estimates that more than two million people depend on production, including around 135,000 registered growers and seasonal workers. Less than 10% of the crop undergoes domestic value addition. For the Harare-based association, access to buyers, the price growers receive and a sustainable supply of curing fuel remain practical concerns across farms of every size.

USD 1.3 billion

Unmanufactured tobacco exports

More than 12%

Share of foreign earnings

Around 5%

Share of GDP

Tobacco in Zimbabwe's economy, 2024.

A history of grower representation

1928

Growers established the growers association.

1934

Advocacy helps establish the Tobacco Research Station at Trelawney.

1936

Auction floors give growers and buyers an organised market for leaf.

1938

The Tobacco Research Act establishes a statutory research board.

1980

The association takes the name Zimbabwe Tobacco Association.

1984

ZTA becomes a founding member of ITGA.

2000s-2010s

Land reform reshapes production. Small-scale growers account for more than 60% of the crop by the 2010s.

Zimbabwe Tobacco Association Objectives

To promote and develop the flue-cured tobacco industry in Zimbabwe and advance and protect the interests of all sections and classes of producers in any way that may seem desirable to the Association and without in any way restricting or limiting the general object.

Grower representation

Represent growers' views on all tobacco-related issues.

Bring growers' concerns to tobacco industry forums.

Represent growers directly at the National Employment Council for Agriculture.

Offer legal representation on tobacco-related issues.

Markets and farm finance

Provide information on local and international tobacco markets.

Analyse production costs and farm cash flow.

Connect growers with contract growing companies.

Consult input suppliers and financial institutions.

Help growers procure coal and arrange transport.

Research and stewardship

Connect growers with training and research institutes, including BAI and TRB.

Support small-scale growers through extension services and field days.

Promote sustainability, agricultural labour practices and good agricultural practices.

Work with the Forestry Commission and SAA on sustainable afforestation.

Member communications

Publish the quarterly magazine Zimbabwe Tobacco Today.

Share email alerts, WhatsApp updates and "Dear Growers" letters on current issues.

Reach members on Facebook (Zimbabwe Tobacco Association) and Twitter (@TobaccoZimbabwe).

Send SMS updates on marketing, short courses and important events.

District participation

Represent tobacco-growing districts through ZTA councillors.

Hold monthly councillors' meetings.

Convene discussion groups in tobacco-growing districts.

Industry partnerships

Represent growers internationally as a founding member of the International Tobacco Growers' Association (ITGA).

Participate as an industry stakeholder at TIMB, TRB and national level.

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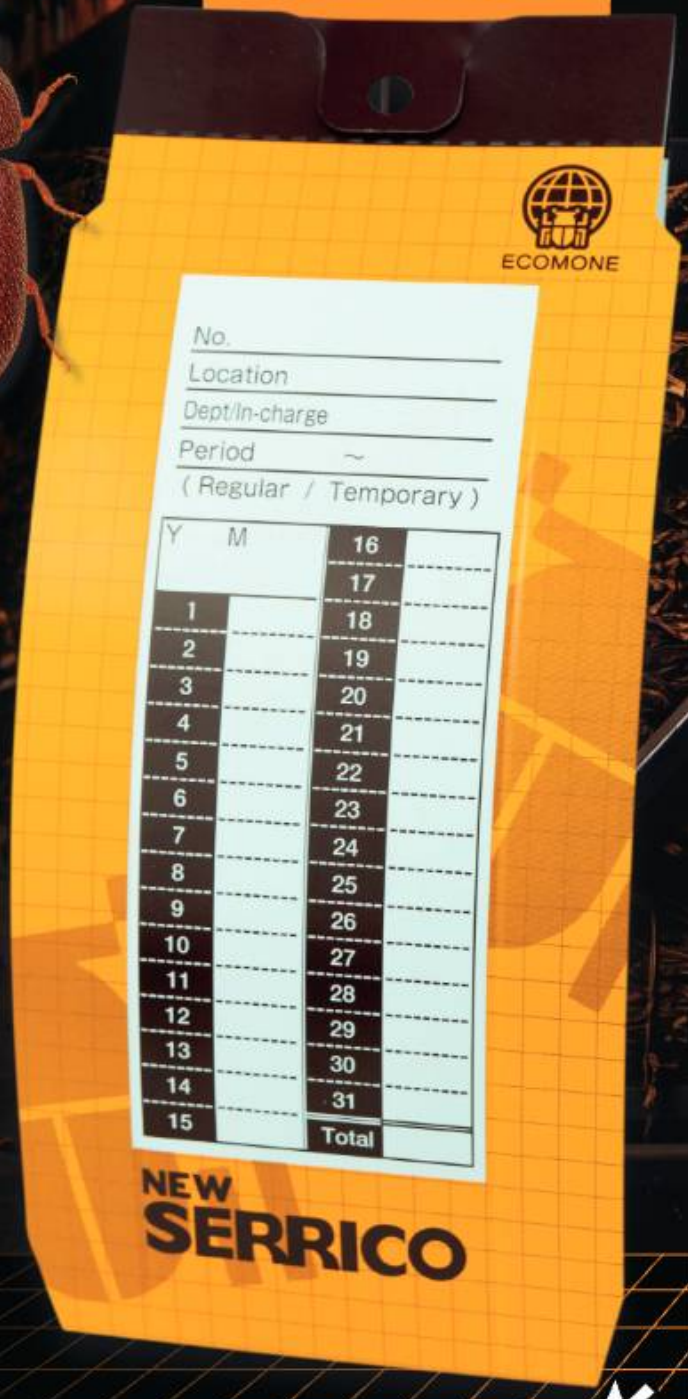

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ITGA AFRICA REGIONAL MEETING

ITGA AFRICA REGIONAL MEETING
30th June to 3rd July 2026
Harare, Zimbabwe

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“Tobacco growing runs in our veins. Tobacco pays our bills. We must not apologize for that.”

Dr. Anxious Masuka
Zimbabwe’s Minister of Agriculture, Mechanisation and Water Resources Development



HARARE, ZIMBABWE | 30 JUNE-3 JULY 2026

Hosted by the Zimbabwe Tobacco Association

Africa's tobacco sector navigates a new market reality



Dr. Anxious Masuka opens the ITGA Africa Regional Meeting in Harare.

Africa continues to strengthen its position as one of the world's leading tobacco-producing regions. Yet after several years of strong demand and expanding production, growers are now operating in a markedly different commercial environment, where oversupply, rising costs and increasing sustainability expectations are reshaping the market.

These developments framed discussions at the International Tobacco Growers' Association (ITGA) 2026 Africa Regional Meeting in Harare, Zimbabwe. Hosted by the Zimbabwe Tobacco Association (ZTA), the meeting brought together grower associations, government representatives, researchers and industry leaders to discuss the market developments, regulatory challenges and sustainability priorities shaping the future of tobacco growing.

Reflecting the strategic importance of tobacco to Zimbabwe's economy, the Conference was officially opened by the Honourable Dr. Anxious J. Masuka, Zimbabwe's Minister of Agriculture, Mechanisation and Water Resources Development. His participation reaffirmed Zimbabwe's commitment to the tobacco sector and recognised ITGA as the leading platform bringing together all relevant stakeholders to shape the future of tobacco growing. In his address, the Minister emphasised the importance of producing a fully traceable and sustainable crop, outlined government initiatives including the establishment of a Tobacco Stabilisation Fund, and delivered a message that resonated throughout the meeting.

African production remains strong

The meeting took place against the backdrop of another large African crop, confirming the continent's growing importance in the global leaf market.

Zimbabwe remains Africa's largest tobacco producer, with the 2025/26 flue-cured Virginia crop estimated at approximately 380 million kilograms, revised down from an initial forecast exceeding 400 million kilograms following adverse weather later in the season. Tobacco continues to underpin the country's rural economy, involving more than 130,000 growers, generating over USD 1 billion in annual grower income, contributing around 10% of Zimbabwe's foreign currency earnings, 50% of agricultural GDP, and 5% of national GDP. Approximately 95% of production is exported to more than 30 countries.

A changing market

Malawi also reported another sizeable crop. Industry projections indicate production of approximately 197 million kilograms, exceeding estimated trade demand of 170 million kilograms, equivalent to an oversupply of around 16%. Burley remains the dominant tobacco type, accounting for 84% of national production, while more than 60,000 clubs and estates were licensed during the current season. However, rising production costs and declining prices have become a growing concern, with average burley prices falling below estimated production costs during the latest marketing season.

Tanzania continues to be one of Africa's fastest-growing tobacco producers. Production increased by 59% during the 2024/25 season and is projected to reach approximately 188 million kilograms in 2025/26. Tobacco export earnings have increased from USD 157 million in 2021/22 to around USD 640 million, while farmer income rose from USD 91 million to USD 475 million over the same period. Today, more than 120,000 farmers grow tobacco in Tanzania, supporting livelihoods for an estimated 2.5 million people across the value chain.

Zambia's tobacco production also continues to expand. The 72 million kilograms marketed in 2025 represented the country's largest crop on record, while production is expected to exceed 80 million kilograms during the current season. Around 95-97% of production is exported, generating more than USD 200 million in export earnings and supporting over 38,000 registered growers. As in other producing countries, delegates reported that global oversupply, weaker international demand and declining prices continue to place pressure on grower profitability, reinforcing the need to strengthen competitiveness and market resilience.

Global supply has shifted

These national reports closely reflected the broader global market outlook presented during the conference.

ITGA's latest analysis showed that global flue-cured Virginia production outside China has expanded from approximately 1.63 billion kilograms in 2022 to 2.36 billion kilograms in 2025 - an increase of around 45%. Over the same period, global burley production increased from 344 million kilograms to 710 million kilograms, representing growth of more than 100%.

Much of this expansion has been driven by increased production across Africa and Brazil following seasons of strong grower prices. The result is a market that has shifted from the supply shortages experienced only a few years ago into a period of oversupply. While global cigarette consumption remains relatively resilient, particularly across emerging markets, increased leaf availability has restored buyers' negotiating power and placed renewed downward pressure on prices.

Grower profitability moves to the centre of the discussion

Against this backdrop, discussions repeatedly returned to one central issue: ensuring growers receive a sustainable return from the value they create.

A Living Income Survey conducted jointly by the Zimbabwe Tobacco Association (ZTA), ITGA and the ECLT Foundation (transitioning to ECLA) found that tobacco remains the principal source of income for more than nine out of ten surveyed households. However, 86.3% of respondents reported that their overall household income remains below what they consider necessary to achieve a decent standard of living. The findings underline the importance of strengthening grower profitability as the foundation of sustainable rural development and reducing vulnerabilities within farming communities.

Opening the Conference, ITGA President José Javier Aranda identified grower profitability as one of the defining challenges facing the global tobacco sector.

"If we are truly committed to the future of our sector, improving the economic well-being of growers must become a shared responsibility and a top priority."

That message was reinforced by one of the conference's most significant pieces of original research.

Evidence, regulation and sustainability

The conference's keynote presentation by Professor Eric Mungatana of Stellenbosch University examined the latest academic evidence on contract farming and smallholder livelihoods across Africa. His review concluded that tobacco remains an important driver of rural development, while stronger producer organisations, improved governance and better-designed contractual arrangements can help ensure that the benefits of contract farming are shared more broadly among farming communities.

Market developments were complemented by Euromonitor International's latest assessment of global nicotine consumption. According to Erwin Henriquez, "the Middle East and Africa remain the last bastion of combustion while the illicit market thrives in the shadow of a complex global regulatory landscape." The presentation highlighted the continued resilience of combustible products across much of the region while drawing attention to the rapid growth of alternative nicotine products, illicit trade and increasingly divergent regulatory approaches around the world.

Regulation remained another central theme. Participants reviewed preparations for COP12 under the WHO Framework Convention on Tobacco Control together with the implications of the European Union's Corporate Sustainability Due Diligence Directive. Delegates agreed that future regulatory requirements should remain practical and proportionate for smallholder growers while preserving access to international markets.

Perhaps one of the clearest messages from the conference was that Environmental, Social and Governance (ESG) is no longer viewed as a future requirement but as an operational reality. Company representatives shared practical experiences in traceability, afforestation, renewable energy, soil conservation, living income initiatives and child labour prevention, demonstrating how sustainability programmes are increasingly embedded within day-to-day tobacco operations.

A new chapter for regional cooperation

Beyond the conference programme, the Members' Session marked an important organisational milestone with the establishment of the new ITGA AfroAsia Region. By bringing together ITGA's African and Asian members under a common regional framework, the initiative recognises the increasingly interconnected nature of tobacco production and trade across the two continents and is expected to strengthen collaboration between two of the world's largest tobacco-growing regions.

The Regional Meeting was preceded by a Living Income Workshop in Takawira Village, where more than 100 tobacco growers participated in an open exchange on the realities of farming and the practical actions needed to strengthen rural livelihoods. Bringing together growers, researchers, companies and development organisations, the workshop reinforced ITGA's commitment to ensuring that growers remain at the centre of discussions on the future of the tobacco sector.



Living Income Workshop in Takawira Village, Zimbabwe, June 2026

Sustainability and governance

By Moses Chiswa
Tobacco Leaf Exporters Association of Zimbabwe (TLEAZ)

Sustainability refers to long-term planning that guides the continued use of resources while maintaining or improving the balance between people, the environment, and profit. It requires that these benefits coexist over time, with negative impacts eliminated, limited, managed, or reduced wherever possible.

The Tobacco Leaf Exporters Association of Zimbabwe (TLEAZ), through its membership and structured committees, has established several commitments, policies, and minimum standards that govern sustainability within our membership and the wider tobacco industry in Zimbabwe. This article seeks to explore the relationship between sustainability, as defined above, and governance, as well as its impact on the long-term viability of the tobacco industry in Zimbabwe. It will focus on eight key pillars of sustainability governance: accountability, transparency, ethics, laws and regulations, inclusiveness, leadership, effectiveness and efficiency, and risk management.

Accountability defines clear roles and responsibilities, ensuring that leadership and leading institutions are answerable for their decisions, actions, and performance. It emphasises measuring performance and addressing the consequences of poor performance or misconduct. Ultimately, accountability reduces operational and reputational risks while increasing stakeholder confidence. In the context of the tobacco industry, accountability by the regulator, the Tobacco Industry and Marketing Board (TIMB), and various industry players will increase confidence among growers, contractors, and, critically, global markets. At all levels, including grower associations, contractor associations, and government institutions, we must measure ourselves against our mandates and hold ourselves accountable to them. We all have a responsibility to act diligently.

Transparent Governance builds trust among stakeholders, allowing them to participate from an informed position. Transparency means openness in decision-making, reporting, and communication. It reflects a willingness by all industry stakeholders to participate in accessible reporting systems, disclosing information openly as a demonstration of industry maturity. All modern reporting standards and initiatives (such as SBTi, GRI, and the OECD guidelines) demand this level of transparency, and our tobacco industry is maturing to meet this reality. A key positive is the national-level Agricultural Labour Practices (ALP) reporting through a unified industry platform, which began in the 2025/26 crop year. Similar reporting must now follow for other sustainability criteria, such as curing fuel efficiencies and the environmental impacts of the tobacco supply chain. Mistrust has no place if we are to successfully overcome our sustainability challenges.

Ethical leadership is of paramount importance. Leading individuals and institutions must stand by principles of codes of conduct, anti-corruption values, and fair, lawful behaviour, while strictly avoiding conflicts of interest. These aspects directly speak to the credibility of individuals and institutions, which naturally builds stakeholder confidence and supports long-term institutional sustainability. For governance to work effectively in the tobacco industry, leadership must possess the high integrity required to uphold the moral framework surrounding sustainability and its initiatives in Zimbabwe.

Zimbabwe has comprehensive laws and regulations addressing nearly all aspects of environmental, social, governance, and sustainability. If evaluated solely on written legislation, the country would score highly against most global standards; however, the true challenge lies in compliance and enforcement. Legislative complexities can make full compliance difficult, or even impossible, for stakeholders, while enforcement is frequently hampered by limited regulatory capacity. This leaves mature industry players obligated to self-regulate, driven by the understanding that sustainability is core to their institutional values.

Fortunately, industry compliance frameworks through the TIMB are beginning to reshape the sector. The recent multi-stakeholder Indaba hosted by the TIMB and the Forestry Commission Zimbabwe (FCZ) marks a vital recognition of tobacco's environmental impacts, underscored by the Minister of Agriculture's call for a ban on indigenous curing wood by 2029. An industry working group has already begun addressing curing fuel sustainability and future

SUSTAINABILITY AND GOVERNANCE

regulation enforcement. Ultimately, robust regulation and enforcement protect the contractual rights and obligations of all stakeholders, promoting consistency and reducing the legal exposure essential for long-term planning and industry viability.

As TLEAZ, we believe deeply in inclusivity, actively considering the perspectives of rightsholders and all other stakeholders. Collaboration sits at the centre of all our initiatives, achievements, and long-term sustainability plans. This commitment to inclusivity has become a top priority, and we are increasingly seeing it reflected across broader industry forums. Expanding inclusive governance plays a vital role in promoting our programs within communities and supporting our collective efforts, a prime example being Sustainable Afforestation Association (SAA), established by tobacco contractors in 2013, and the significant successes it has since achieved. Ultimately, achieving true sustainability requires inclusive governance in decision-making to ensure the longevity of the tobacco industry, leaving no one behind.

Leadership and strategic vision must provide clear direction and long-term guidance within the governance of sustainability, establishing a defined mission and objectives to steer future planning. This requires baseline studies to identify where the industry currently stands, followed by projections and projects that are continuously monitored and evaluated to measure progress toward specific targets. For example, the tobacco industry is targeting full sustainability by 2035. Nestled within that target is a project to convert all tobacco curing barns to achieve significantly greater efficiency by 2030, which will reduce annual curing fuel consumption by 50%. Ultimately, strong leadership helps our institutions remain resilient and tightly focused on these long-term sustainability goals.

When resources are not utilised sustainably, it indicates a lack of strong governance; conversely, efficiency and effectiveness are direct products of good governance. Deforestation is a critical topic in Zimbabwe, with the tobacco sector historically linked to roughly 15% of national forest loss - a challenge indicative of past governance gaps. To mitigate this, tobacco contractors formed the SAA, investing 13 million dollars since 2013 to plant 30,000 hectares, which will yield approximately 181,000 cubic metres of sustainable wood for harvest this year. Separately, TLEAZ members have invested an estimated 12 million dollars into barn conversions - a figure that excludes their individual, community, and school afforestation programmes.

Through greater creativity, transparency, and growing industry maturity, the focus is shifting from simply attributing 15% of deforestation to tobacco toward a broader national question: how can a coordinated, whole-of-government approach address deforestation across all economic and social activities in Zimbabwe? This collaborative strategy has now been officially adopted as national policy by the Cabinet. To deliver true efficiency and effectiveness, the next step is transforming this official policy into meaningful action and measurable results. This requires all stakeholders to champion the efficient allocation of resources, robust operational systems, continuous improvement, and evidence-based decision-making to achieve our long-term sustainability goals.

Risk management is fundamental to modern governance, forming the foundation for resilience and sustainability. It focuses on identifying, assessing, and mitigating risks for the purpose of long-term value creation by integrating environmental, social, and governance (ESG) criteria into policies and structures. In 2021, TLEAZ conducted a comprehensive supply chain impact assessment to identify and mitigate these risks. This exercise successfully highlighted gaps within individual member organisations, leading to the embedding of governance policies at the individual company level, then at the association level, and ultimately escalating to the wider industry and regulator level in the form of compliance frameworks. As an industry and a major tobacco supply origin for the global market, we continue to de-risk and mitigate against deforestation - it is our core responsibility, safeguarding the livelihoods of many tobacco grower families.

In conclusion, Zimbabwe faces many challenges common to tobacco-growing nations, including environmental degradation and deforestation, human and labour rights issues, and governance concerns. However, the focus must remain on establishing the robust governance systems required to mitigate, manage, and, where possible, eliminate these risks. Specific to Zimbabwe, the defining questions are clear: to what extent do our solutions meet future demand for natural resources in a sustainable manner, and can our current governance structures deliver this long-term sustainability? What is certain is that the wheels are turning and the due diligence cycle continues. Action and results will become increasingly visible. Zimbabwe has an excellent track record of adaptation - our growers are passionate and resilient, our contractors are steadfast, and our government remains committed to a clear tobacco agenda. Together, we can govern our tobacco industry towards true sustainability!

From seedbeds to curing barns

Diana Samakande | Editor, Curverid Farmer Magazine

Company History and Operations

Could you provide a brief overview of your company's presence in Zimbabwe, highlighting key milestones, achievements, and developments?

Since establishment in 2010, Curverid Tobacco (PVT) Ltd (CTL) has steadily expanded its contract farming operations, establishing itself as one of Zimbabwe's leading tobacco merchants. Over the past decade, the company has built a strong network of growers across key tobacco-producing regions, including Mashonaland Central, Mashonaland West, Mashonaland East, and Manicaland.

CTL's core mandate is to contract and finance growers, purchase, process, and export tobacco to global customers. By positioning itself as a reliable partner in the tobacco value chain, the company continues to strengthen its role in connecting Zimbabwean farmers with international markets.

In 2013, Curverid Tobacco (PVT) Ltd (CTL) established a woodlot in Marondera, Mashonaland East Province, as part of its direct forestry programme. Known as the Ruzawi woodlot, the site encompasses 315 hectares of gum trees and is surrounded by more than 500 hectares of protected indigenous Miombo woodland. Beyond afforestation, the initiative has benefitted contracted farmers and local communities by supplying tree seedlings, providing sustainable firewood, and creating employment opportunities.

Zimbabwe's Role in the Global Supply Chain

From your company's perspective, what is the strategic importance of Zimbabwe within the global tobacco leaf supply chain?

Zimbabwe stands as the leader in tobacco production across Africa and consistently ranks among the world's top six producers. The nation plays a pivotal role in supplying international markets with Flue-Cured Virginia (FCV). The sector generates more than US$1 billion annually, underscoring tobacco's importance to Zimbabwe's economy and its contribution to international trade.

Renowned for its quality, distinctive flavour profile, and adherence to global standards, Zimbabwean tobacco enjoys strong demand worldwide. Leveraging this reputation, CTL positions Zimbabwe as a key sourcing base, delivering traceable, quality tobacco to customers.



Curverid representatives receiving the award for export growth and competitiveness runner up.

Traceability, fuel and field support

Evolution and Key Changes

Over the past decade, what significant changes has your company undergone in Zimbabwe, and what have been the main drivers behind these developments?

Adoption of digital systems for farmer management and crop monitoring, improving efficiency, transparency, and accountability.

Strengthened focus on traceability and ESG compliance, including adherence to international standards such as Sustainable Tobacco Program (STP) reporting, carbon reporting, green leaf testing, and grievance mechanisms for growers.

Sustainability Challenges and Response

What are the main social and environmental challenges related to tobacco growing in Zimbabwe? How is your company addressing these challenges in practice?

Zimbabwe's tobacco industry faces several pressing challenges, including the need for sustainable curing fuel, challenges around agricultural labour practices, and the impact of unpredictable weather patterns. CTL has implemented a range of initiatives to mitigate these issues while promoting sustainability and farmer resilience.

Sustainable Curing Fuel

To reduce reliance on unsustainable fuel sources, CTL distributes sustainable wood to more than 30% of its grower base. The company has also constructed over 7,000 fuel-efficient Rocket and Zig-Zag barns, significantly lowering fuel consumption and carbon emissions. In addition, forestry field officers have been employed to monitor tree planting and train growers in woodlot management, improving survival rates of planted trees. CTL further extends its sustainability efforts by partnering with schools in tobacco-growing regions, planting trees annually at more than 100 schools.

Combating Child Labour

CTL enforces a strict zero-tolerance policy on child labour. The company runs a comprehensive monitoring and training programme, with field staff regularly visiting growers to provide hands-on guidance. A quarterly magazine offers practical training advice, while a Memorandum of Understanding (MOU) with an independent third-party organisation ensures additional training for growers, children, schools, and parents on child labour awareness and prevention.



Field officer training on seedbed management

Grower support and the future

Support for Tobacco Growers

What initiatives or programmes does your company have in place to support tobacco growers in Zimbabwe? Are there any specific projects or success stories you would like to highlight?

Grower Support

CTL provides contract sales floors that serve as direct points of contact for contracted growers, offering services, query resolution, and post-sales support. Field Technicians deliver agricultural and sustainability extension services, while growers benefit from loans and training programmes. To further enhance convenience, banking facilities are available on-site, enabling farmers to withdraw sales proceeds directly.

Child Labour and School Attendance Training

In partnership with an independent expert organisation, CTL has rolled out extensive training programmes between 2023 and 2025. A total of 36 schools have participated, with approximately 19,000 students and 1,240 teachers and parents trained on child labour awareness and the importance of school attendance.

Improved School Infrastructure

CTL has invested in sanitation and water facilities for schools, constructing toilet blocks and wash stations at 10 schools, benefitting more than 4,000 students. Boreholes have also been installed to improve access to clean water.

Future Outlook

How does your company view the future of tobacco cultivation in Zimbabwe? What key challenges and opportunities do you foresee?

The Government of Zimbabwe has set an ambitious target: to raise annual tobacco production to 500 million kilograms. This bold vision holds significant promise - boosting grower incomes, strengthening rural economies, and cementing Zimbabwe's position as a leading player in the global tobacco market.

With the opportunity comes responsibility. Scaling production to this level requires strict adherence to sustainability standards. Traceability has become a non-negotiable requirement in international markets, while mounting pressure demands a shift away from curing methods that rely on indigenous wood. The challenge is clear: growth must not come at the expense of the environment.



Toilets built under the WASH project

Diana Samakande is the Editor of the Curverid Farmer Magazine and has been with Curverid since 2014. To date, 27 editions of the magazines have been published. The magazine has been a powerful tool to educate contracted growers on sustainability issues and good agricultural practices.

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Nine decades in Zimbabwe's tobacco fields

Alex Tait | Managing Director, Alliance One Mashonaland Tobacco

Company History and Operations

Could you provide a brief overview of your company's presence in Zimbabwe, highlighting key milestones, achievements, and developments?

Alliance One Mashonaland Tobacco (AOMT), a subsidiary of Alliance One International, was founded in 1936 and will be celebrating nine decades of operations this year. Formerly known as Mashonaland Tobacco Company, we transitioned to our current name in 2025.

The Company is one of 34 tobacco contractors in the country and the second largest independent contractor. We contract both smallholder and commercial farmers, providing them with inputs and agronomic advice as well as financing for infrastructure, irrigation, machinery, and curing facilities to enhance efficiency, reduce costs and improve leaf quality.

Recent company milestones:

Recognized for Excellence in Responsible Tobacco Farming: At the 2026 National Business Awards, AOMT received the Super Platinum Award for its leadership in sustainable and responsible tobacco production in Zimbabwe. This honor highlights AOMT's dedication to sustainable tobacco production, supporting farmers' livelihoods, and operating ethically and responsibly.

Adoption of the Company's Global 2030 Sustainability Strategy: The launch of our Company's refreshed global sustainability strategy at the end of 2025 marked an important milestone. This updated strategy streamlines our parent Company's sustainability agenda, enabling a more disciplined approach to value creation for the business and our stakeholders. The focus areas of this strategy consist of three environmental topics - climate action, nature and regenerative agriculture - and three social topics - farmer livelihoods, responsible supply and engaged workplace - and are underpinned by our foundational focus on stronger communities and governance.

What Matters Most: Our People

AOMT continues to strengthen its focus on employee well-being, workplace safety and a culture grounded in our STAR Values - Supportive, Transparent, Adaptable and Responsible. The Company also runs regular health and safety initiatives such as wellness days, targeted health education programs, cancer awareness workshops and defensive driving trainings for employees operating vehicles.



The AOMT team with the Super Platinum Award for Excellence in Responsible Tobacco Farming at the 2026 National Business Awards.

Building a resilient supply chain

These efforts were recently recognized at the Blackbelt Human Resources Awards of Mastery 2025. At the event, AOMT was awarded the Employee Relations Best Practices award. Additionally, Tendai Mazingaizo, HR officer-industrial relations for AOMT was honored as Employee Relations Specialist of the Year, reflecting outstanding dedication to our employees.

Zimbabwe's Role in the Global Supply Chain

From your company's perspective, what is the strategic importance of Zimbabwe within the global tobacco leaf supply chain?

As the largest tobacco producer in Africa, Zimbabwe is a strategically important country in the global tobacco leaf supply chain. The scale reflects the country's strong recovery following land reform challenges in the early 2000s, which was supported by the introduction of contract farming in 2005. Contract farming played a key role in rebuilding crop production and sustaining long-term growth. We continue to support that development through our farmer contracting model and strong farmer partnerships.

Zimbabwe is also valued for its high-quality flue-cured tobacco produced at a competitive cost, which supports premium blending requirements and helps us to deliver consistent value to customers.

Evolution and Key Changes

Over the past decade, what significant changes has your company undergone in Zimbabwe, and what have been the main drivers behind these developments?

Evolution in our Zimbabwe operations has been driven by our commitment to building a more resilient, sustainable and farmer-centered supply chain.

The most recent change in our business is our refreshed brand identity. To more closely align with our business' global parent company, in 2025, our operations transitioned from our former brand identity as Mashonaland Tobacco Company to Alliance One Mashonaland Tobacco. The transition served as a natural step that emphasized our operation's significant contribution to Alliance One's success and the importance of Zimbabwe to the global tobacco market.

Sustainability Challenges and Response

What are the main social and environmental challenges related to tobacco growing in Zimbabwe? How is your company addressing these challenges in practice?

The most significant environmental challenge for Zimbabwe's tobacco market is the potential of deforestation associated with leaf curing practices. On the social side, risks include the potential of child labor or other human rights violations. To mitigate these challenges, the Company implements a range of targeted initiatives.

Afforestation and sustainable wood supply

Our participation in programs such as the Sustainable Afforestation Association, an industry approach to providing growers with sustainable curing fuel, as well as partnering to participate in the "One Tree Per Employee," "One Child, One Tree" and farmer tree distribution programs have supported the planting of over 15 million trees to date, helping establish renewable curing fuel sources and supporting reforestation.

Farmer support and sustainable fuel

To reduce reliance on unsustainable wood we also support growers through woodlot development and access to sustainably sourced curing fuel and barns.

Energy efficiency and renewable energy

We have invested in solar energy systems for our operations, which generate approximately 5,000 kWh per month to reduce fuel use, emissions and exposure to unreliable electricity supply.

The company has invested in new boilers as well as a fleet of electric forklifts in the factory in an effort to drive efficiency and meet ambitious greenhouse gas reduction targets.

Child labor prevention and community programs

We promote education initiatives and partnerships to raise awareness of child rights, and human rights generally, and provide access to grievance mechanisms, reaching over 10,000 individuals.

Health and safety initiatives

We provide ongoing training, wellness programs and safety awareness efforts to support safer working conditions across operations.

Working with growers for responsible growth

Together, these actions form a coordinated approach to reducing environmental impact, strengthening community resilience and supporting more sustainable tobacco production.

Support for Tobacco Growers

What initiatives or programmes does your company have in place to support tobacco growers in Zimbabwe? Are there any specific projects or success stories you would like to highlight?

AOMT supports our contracted farmers by utilizing our agronomic expertise to provide hands-on training and technical support to help improve the quality and yield of a farmer's tobacco crop, which in turn, can increase a farmer's income, supporting their overall livelihoods.

A core element of this support is annual good agronomic practices training delivered by field technicians who work directly with farmers throughout the crop production cycle. These programs help farmers adopt improved cultivation practices with the goal of increasing both yield and quality. In addition, our field technicians provide ongoing technical guidance at the farm level to help better prepare farmers for seasonal and climate-related challenges.

Together, these initiatives have contributed to improved productivity, more consistent crop quality and stronger income potential for farmers.

Future Outlook

How does your company view the future of tobacco cultivation in Zimbabwe? What key challenges and opportunities do you foresee?

The future of tobacco cultivation in Zimbabwe relies on responsible growth underpinned by productivity, sustainability and strong farmer partnerships. As global demand for high-quality, responsibly produced tobacco is expected to remain resilient in the coming years, Zimbabwe is well positioned to strengthen its role as a reliable supplier to international markets.

Strengthening long-term farmer relationships through competitive pricing and comprehensive support programs will be central to future growth. To achieve this, we will continue expanding tobacco production by helping growers improve efficiency, crop yield and leaf quality through good agronomic practices. We will also continue investing in critical infrastructure, including more efficient curing barns and expanded irrigation systems, enabling farmers to improve productivity while reducing environmental impacts and building resilience to changing weather conditions.

Overall, the future of Zimbabwe's tobacco industry will depend on scaling responsibly, balancing production growth with greater efficiency, strengthening farmer livelihoods and advancing responsible agricultural practices across the supply chain.



One Tree Per Employee initiative.



Solar panels at AOMT's Zimbabwe operations.

Photographs courtesy of Alliance One Mashonaland Tobacco.


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Africa



Zimbabwe

Zambia

Malawi

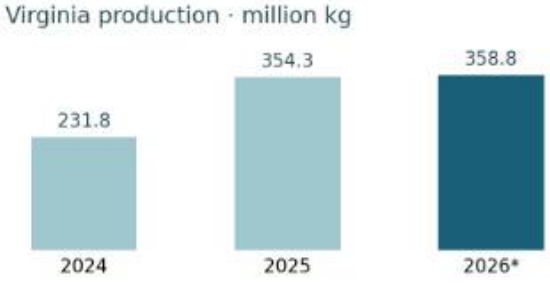
Tanzania

Zimbabwe

Zimbabwe

Zimbabwe Tobacco Association (ZTA)

Zimbabwe's growers planted 12,000 more hectares of flue-cured Virginia in 2026 and harvested just 4.5 million kg more leaf. For families arriving at the sales floors with loans to repay, the bigger change was in the price. A kilogram that had fetched USD 3.32 a season earlier now brought an average of USD 2.50.





A larger crop spread over more farms

The previous season had set a high benchmark. Virginia production jumped from 231.8 million kg in 2024 to 354.3 million kg in 2025. In 2026, grower numbers rose again, from 130,000 to 143,000, and the planted area reached 165,000 hectares. Preliminary output edged up to 358.8 million kg. Across that larger area, each planted hectare produced about 2,175 kg, down from 2,316 kg the year before.

Too much rain at planting time

For late-planted tobacco, the difficulty began below ground. Heavy November and December rains left fields with too few dry spells for young plants to develop strong roots. Earlier plantings also suffered: persistent rain encouraged disease, reducing yields and the quality of the leaf growers eventually took to market. When the rains eased in mid-February, many farms faced increased pressure from nematodes.

Lower yields compounded the fall in price. Applying the reported average price to production per planted hectare gives an indicative gross crop value of about USD 5,436 per hectare in 2026, down from USD 7,688 in 2025. That is a decline of roughly 29% before any costs are paid. Individual returns depended on the yield and grades each grower sold.

* Preliminary 2026 crop and price figures.



Robert Millar, ZTA President, Mercedes Vazquez, ITGA CEO and Richard Taylor, ZTA Vice President, ITGA Africa Regional Meeting, Harare, Zimbabwe, July 2026.

Zimbabwe | Outlook

Zimbabwe

What it cost to bring the crop to market

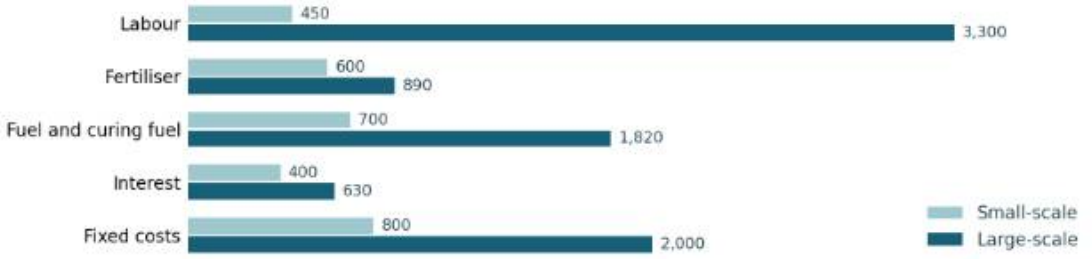
The country submission puts the cost of growing a hectare of Virginia at USD 4,600 on a small-scale farm and USD 14,600 on a large-scale farm. Labour accounts for USD 3,300 in the large-scale budget, about 23% of the total. On the small-scale farm, fertiliser alone costs USD 600 per hectare, while fuel for field operations and curing together costs USD 700.

Financing the season adds another expense. Interest accounts for USD 400 per hectare in the small-scale budget and USD 630 on the large-scale farm. Growers reported that many had struggled to repay loans after the harvest. With less revenue coming in and the next crop still to finance, they gave the season the lowest satisfaction rating on ITGA's five-point scale.

Outlook for 2027

Growers expect plantings to fall and hope a smaller crop will help prices recover. With El Niño a concern, the country submission sets out a possible minimum Virginia crop of 280 million kg. Its figures assume 118,000 planted hectares and a grower price of USD 3.00 per kg. At that price, growers would recover 50 cents of the 82 cents per kg lost in 2026.

Growers rated the outlook between poor and neutral. The prospect of a better selling price offers some encouragement, but for families still servicing last season's loans, access to finance will help determine how much land they can plant.



Virginia crop indicators	2025	2026[1]	2027 scenario[2]
Growers	130,000	143,000	120,000
Planted area (ha)	153,000	165,000	118,000
Production (million kg)	354.3	358.8	280.0
Grower price (USD/kg)	3.32	2.50	3.00

Selected costs from the two Virginia farm budgets · USD per hectare

[1] Preliminary crop and price. [2] Member estimate, conditional on the impact of El Niño.



ITGA Africa Regional Meeting, Harare, Zimbabwe, July 2026.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Zambia





Tobacco Association of Zambia (TAZ)

For Zambia's Virginia growers, the weight of the national crop barely changed in 2026. What buyers paid for it did. Production came within 1% of the previous harvest, yet the average price fell from USD 2.90 to USD 1.98 per kg. For every 100 kg of Virginia sold at those averages, a grower received USD 92 less than a year earlier.



Rain helped the crop grow but left some leaf thin

The rains helped tobacco develop in some districts. In the wettest areas, growers brought in a larger proportion of thin leaf. The effect became apparent at sale, when bales weighed less than growers had expected and poorer quality affected the grades they could achieve. Smallholders dependent on rainfall were particularly exposed. Most growers found buyers, but the proceeds varied enough from farm to farm for growers to rate the season neutral overall.

Burley overtakes Virginia on price

A year earlier, Virginia had fetched 44 US cents per kg more than Burley. In 2026, Burley finished 29 cents ahead, even though its own price slipped from USD 2.46 to USD 2.27 per kg. For Burley growers, the bigger change was in the size of the harvest. Output fell from 9.91 million to 8.86 million kg, accounting for about three-quarters of the decline across the two types.

The planting figures help explain the different harvests. Virginia occupied 31,274 hectares in both seasons, while the Burley area fell from 6,621 to 3,621 hectares. Even on that smaller area, 5,610 growers cultivated Burley, up from 5,430 the year before. That brought the average Burley planting down from about 1.22 hectares per grower to 0.65.



Albert van Wyk, TAZ, ITGA Africa Regional Meeting, Harare, Zimbabwe, July 2026.

Zambia | Outlook



Zambia

What a hectare of Virginia costs

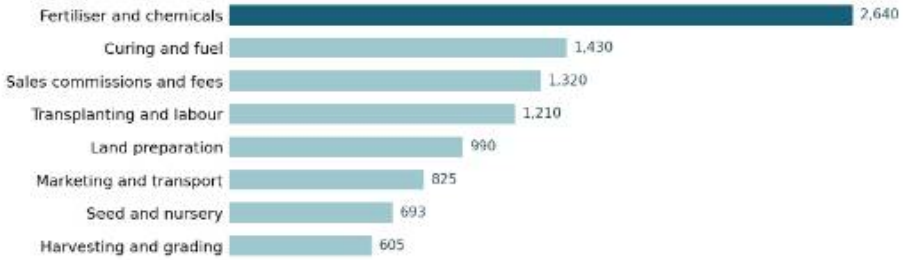
Much of a Virginia grower's money is committed before the leaf reaches a buyer. Zambia's 2025/26 budget puts fertiliser and chemicals at USD 2,640 per hectare, the largest single expense. Curing and fuel add another USD 1,430. Together they account for 42% of the USD 9,713 budget. Selling the crop also carries a cost: commissions and fees alone amount to USD 1,320 per hectare, before marketing and transport.

The budget allows for 44 labour-days per hectare for transplanting and related work, followed by another 50 for harvesting and grading. Thin leaf still has to be picked, cured, graded and taken to market. For growers in the wettest districts, a lighter bale meant fewer saleable kilograms over which to spread those costs.

Outlook for 2027

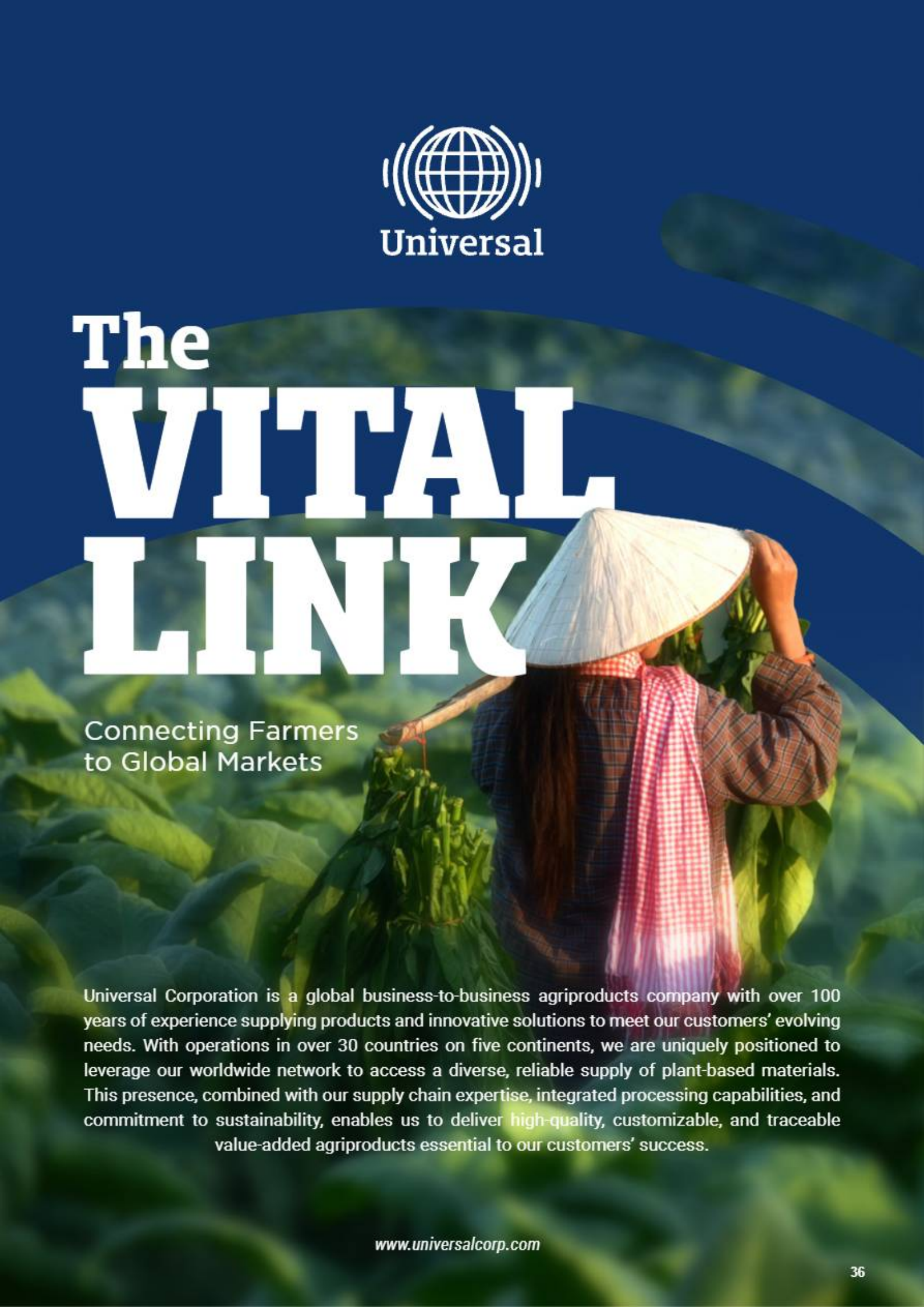
Zambia's member submission envisages a combined crop of 67 million kg, close to the 67.6 million kg harvested in 2026. Within that total, Virginia is expected to gain about 1.3 million kg and Burley to lose nearly 1.9 million kg. The outlook assumes that Virginia recovers to USD 2.90 per kg, the price it averaged in 2025.

Growers rate the coming season neutral. After a crop marked by excess water in some districts, their concern at the time of reporting was that El Niño could delay the first rains or bring prolonged dry weather. For rain-fed farms, the timing matters from September to November, when growers transplant and young tobacco needs enough moisture to establish.



Zambian crop indicators	2026 reported	2027 estimate
Virginia production (million kg)	58.72	60.00
Burley production (million kg)	8.86	7.00
Virginia grower price (USD/kg)	1.98	2.90
Burley grower price (USD/kg)	2.27	2.20
Total planted area (hectares)	34,895	35,000

Flue-cured Virginia production budget - USD per hectare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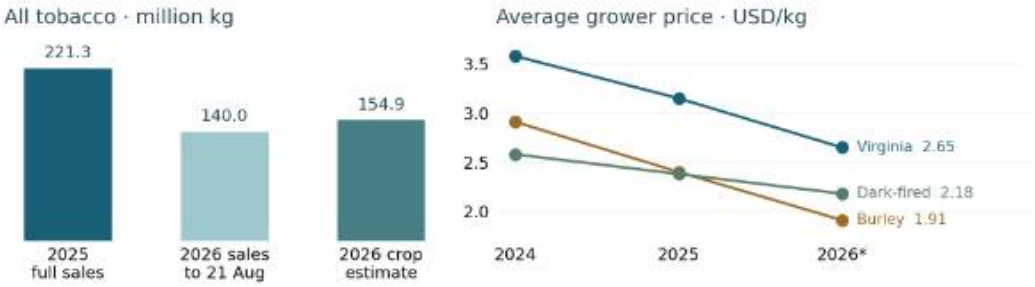
Malawi

Malawi

TAMA Farmers Trust / Agricultural Research and Extension Trust (ARET)

Malawi's growers went into the 2026 selling season hearing that there might be more tobacco than buyers wanted. By August, the picture had changed. Weather and disease had cut the expected harvest to 154.9 million kg, about 9% short of buyer demand. Many growers who had already sold believed the earlier talk of a surplus had weighed on the price of their leaf.



How the Burley crop lost weight

The first losses came early, when prolonged drought left fewer plants standing in the fields. Heavy rain then washed fertiliser from the soil and left some plots waterlogged. Burley suffered in particular: leaves gained less weight, and the persistent rain favoured bushy top and wildfire disease. At harvest, wet weather slowed the work of bringing the leaf in. Growers short of barn space had less room to cure the crop they had managed to save.

Burley accounted for 124.6 million kg of the 140.0 million kg sold by 21 August. Flue-cured Virginia contributed 14.2 million kg and dark-fired tobacco another 1.2 million kg. Malawi tracks crop volumes through sales, which normally continue into September. The 154.9 million kg figure is the estimate for the whole season.

Malawi planted 79,856 hectares in 2026, down from 136,373 the year before. Burley accounted for almost the entire net reduction as its area fell from 127,791 to 70,924 hectares. Virginia moved in the opposite direction, gaining about 1,346 hectares to reach 8,047. The shift began with planting decisions, before weather and disease took their toll on the standing crop.

* The 2026 prices are averages through 21 August. The full-season crop estimate includes leaf already sold.

A smaller crop on fewer hectares



Abiel Kalima Banda and Jose Aranda, ITGA Africa Regional Meeting, Harare, Zimbabwe, July 2026.



TAMA Farmers Trust, ITGA Africa Regional Meeting, Harare, Zimbabwe, July 2026.

Malawi | Outlook

Malawi

What the selling price meant on the farm

Through 21 August, Burley averaged USD 1.91 per kg, roughly a fifth below the previous season's USD 2.40. For every 100 kg sold at those averages, a grower received USD 49 less. Lighter leaves also meant fewer kilograms to sell. Growers rated the marketing season unsatisfactory, pointing to the gap between the surplus they had been led to expect and the shortage that ultimately appeared likely.

The national farm budget puts the cost of growing a hectare of Burley at USD 4,314, including USD 909 for labour and USD 613 for interest. At the August average price, covering that budget would take about 2,260 kg of saleable leaf per hectare. That calculation illustrates how strongly the return depends on leaf weight, even before differences in grade and price between farms are taken into account.

Virginia growers faced the highest budget at USD 6,087 per hectare. Curing alone accounted for USD 1,254, about one-fifth of the total. Their average selling price was USD 2.65 per kg through August, down 50 cents from the previous season.

Outlook for 2027

Licensing for the next crop opened on 27 July while the 2026 selling season was still under way. By 21 August, 1,318 licences had been recorded, including 1,191 for Burley. The Tobacco Commission counts licences issued to clubs and estates, so one licence can represent more than one growing family. The timing also makes this first count too early to gauge the size of the next crop.

Growers rated the outlook poor. At the time of the submission, a strengthening El Niño was expected to bring below-average rain and prolonged dry spells, particularly in southern Malawi. After a season that began with gaps in the fields, the immediate concern was whether there would be enough rain for the next planting to establish.



Malawi crop indicators	2025 season	2026 report
Planted area (hectares)	136,373	79,856
Licences (clubs and estates)	76,161	60,141
Average price, all types (USD/kg)	2.45	1.99[1]

Reported production cost by tobacco type - USD per hectare

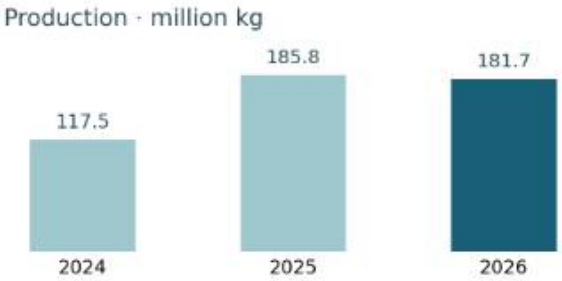
[1] Average for sales through 21 August 2026.

Tanzania

Tanzania

Tobacco Cooperative Joint Enterprises (TCJE) / Tanzania Tobacco Board (TTB)

Some Tanzanian growers had to plant their tobacco twice in 2025/26. The rains arrived in the last week of October, then fell too lightly and unevenly through November and December for young plants to establish in many areas. By February and March, growers in some of those tobacco districts faced the opposite problem. Heavy rain washed fertiliser from the soil, affecting the weight and quality of the leaf they would take to market.





More land yielded less leaf

Nearly 98,000 growers planted tobacco in 2026, up from just over 94,000 the year before. Together they put an additional 8,320 hectares under tobacco. Yet the national harvest fell by 4.1 million kg to 181.7 million kg. Each planted hectare produced an average of 1,246 kg, down from 1,351 kg in 2025. The price paid for each kilogram fell more sharply still.

At USD 1.58 per kg, the 2026 average was 97 US cents below the previous season. A grower selling 100 kg at those prices received USD 158, compared with USD 255 a year earlier. Taken together, lower yields and prices reduced the indicative gross value of the crop per planted hectare from about USD 3,445 to USD 1,970. That 43% fall measures the value of the leaf before any costs of growing, curing or selling it.

Virginia sets the tone at market

Flue-cured Virginia accounted for 180.1 million kg of the 181.7 million kg harvest. Its average grower price fell from USD 2.56 to USD 1.58 per kg, so the change in what Virginia buyers paid was felt across almost the entire sector. Growers reported lower incomes than in any of the previous three seasons and rated the marketing season unsatisfactory. Alongside the effect of weather on local leaf quality, the country submission identified global tobacco supply as a major influence on prices.



Benedict Kisaka, TCJE, ITGA Africa Regional Meeting, Harare, Zimbabwe, July 2026.

Tanzania | Outlook

Tanzania

Beyond flue-cured Virginia

For Tanzania's 3,596 dark-fired growers, the season brought an especially sharp loss of output. They planted 2,209 hectares, up from 1,556, but harvested just 982 tonnes against 1,517 the year before. The average dark-fired price slipped by five US cents to USD 1.82 per kg. The larger change for these farms was how few kilograms each hectare produced.

Dark air-cured production also fell, from 470 to 212 tonnes. Burley moved in the other direction, rising from 145 to 262 tonnes even as the number of Burley growers fell from 724 to 568. These smaller crops mattered to the families growing them, though their volumes were too small to change the course of the national harvest.

Outlook for 2026/27

Growers rated the outlook poor. After a selling season that fell short of expectations, the Tanzanian report warned that some families might lack the means or the incentive to plant as much tobacco again. Its provisional figures nevertheless allow for a larger harvest. Reaching 200.7 million kg on the area indicated would require about 1,350 kg per hectare, close to the 2025 result and roughly 8% above 2026.

The provisional figures imply only a 2% increase in planted area. Most of the additional leaf would therefore have to come from better yields. That is also where the country submission sees scope to reduce the cost of producing each kilogram. For families deciding how much land to plant, the uncertainty is whether the rains will arrive when the crop needs them and what price buyers will offer when it is ready.



Tanzanian crop indicators	2025/26 reported	2026/27 provisional
Growers	97,986	106,847
Planted area (hectares)	145,844	148,667
Flue-cured Virginia (million kg)	180.1	195.3
All tobacco (million kg)	181.7	200.7

Production of other leaf types · tonnes



Stanley Mnozya, TTB, ITGA Africa Regional Meeting, Harare, Zimbabwe, July 2026.

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Brazil

Afubra | Original text provided in Portuguese

Brazil's tobacco-growing families brought in 748,840 tonnes in 2025/26, almost matching the previous harvest. In Rio Grande do Sul, what mattered to growers as the selling season unfolded was how long buyers took to purchase their leaf and what they would pay for the best of it.

Selling the crop

Those concerns brought growers from across the state to Santa Cruz do Sul. They protested the slow pace of buying and challenged the way buyers graded and priced their best leaf. Afubra joined the demonstrations and monitored purchases.

Together with other grower organisations, Afubra took the growers' concerns to buyers, SindiTabaco and Brazil's competition authority, CADE, pressing for fairer grading and a more predictable buying season.

Leaf production and grower prices

Across Brazil, the average grower price barely moved, slipping from USD 3.46 to USD 3.45 per kg. Virginia, by far the largest share of the harvest, gained one US cent per kg, while Burley fell from USD 3.09 to USD 2.90. The national figures also mask differences in the fields. Brazil's 149,310 tobacco-growing families cultivated 330,415 hectares. Some benefited from timely rain, while others saw frost, hail or drought take a toll on yields and leaf quality.

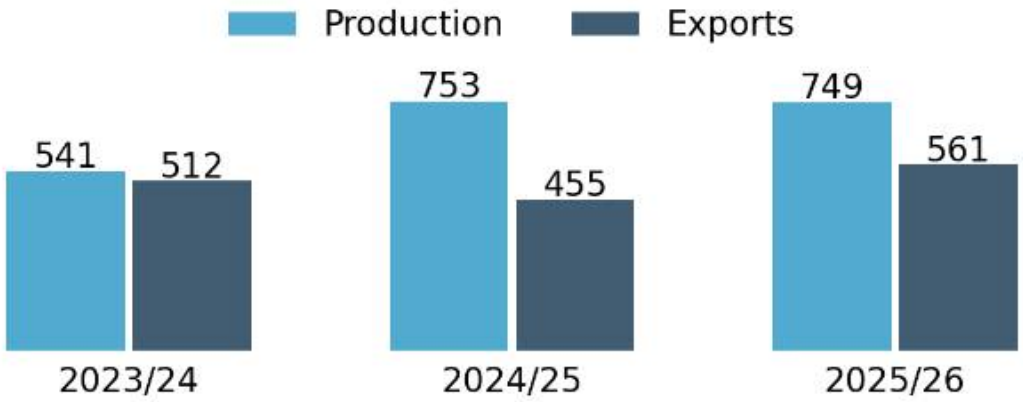
Leaf type	2024/25 · tonnes	2025/26 · tonnes	2024/25 · USD/kg	2025/26 · USD/kg
Flue-cured Virginia	648,189	639,471	3.57	3.58
Burley	59,629	60,089	3.09	2.90
Comum	12,073	10,669	2.67	2.54
Others	32,617	38,611	2.27	2.29
All tobacco	752,508	748,840	3.46	3.45



Marcilio Drescher, Afubra President, ITGA Americas Regional Meeting, Santa Cruz do Sul, Brazil, May 2026.

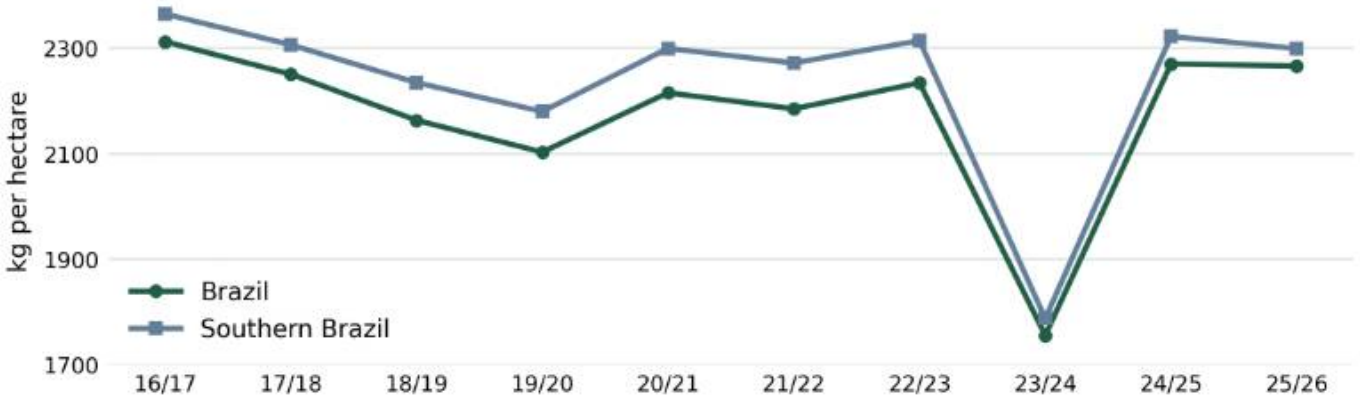
Brazil | Production

While the harvest held close to last season's level, Brazil shipped 23.4% more tobacco abroad. Exports rose from 454,806 to 561,053 tonnes, even as the average export price fell from USD 6.54 to USD 6.04 per kg.



Yields and the cost of growing tobacco

For growers who remember the difficult 2023/24 crop, the last two harvests mark a recovery. That season yielded just 1,756 kg per hectare nationally, the lowest in Afubra's ten-year series. The average climbed to 2,270 kg the following season and held at 2,266 kg in 2025/26. Southern Brazil outyielded the national average throughout the decade, though the gap narrowed to 33 kg per hectare in the latest harvest.





Marcilio Drescher, ITGA and Afubra President, ITGA Annual General Meeting, Dortmund, Germany, September 2026.

Brazil | Costs and outlook

Brazil

Cost item (BRL/ha)	Virginia	Burley
Labour	17,885	14,384
Fertiliser (base and top-dressing)	4,300	4,281
Crop protection	1,562	1,273
Firewood	2,738	-
Other costs	15,285	12,707
Total production cost	41,771	32,645

Source figures rounded independently. Afubra lists firewood separately for Virginia only.



Yields held steady, but the cost of bringing in a hectare of tobacco rose by 9.85% in Brazilian reais for Virginia and 9.32% for Burley. Labour alone accounted for 43% of Virginia costs and 44% of Burley costs. A hectare of Burley took 678 hours of work, compared with 635 for Virginia.

Virginia was still the more expensive crop to grow, with firewood for curing among its costs. At the exchange rate Afubra reported (BRL 5.1475 to the US dollar), growing a hectare of Virginia cost about USD 8,115, compared with USD 6,342 for Burley.

Outlook for 2026/27

As families decide how much tobacco to plant for 2026/27, uncertainty over grain and dairy prospects is sustaining interest in the crop. Afubra expects the area under tobacco to hold broadly steady in many regions. Some growers are already transplanting earlier, when young plants are more exposed to frost and excess moisture. For each family, Afubra advises, the decision on acreage should start with how much leaf it can cure, how many hands are available and what it will cost to bring the crop in.

Source Afubra, Brazil country submission to ITGA, August 2026.



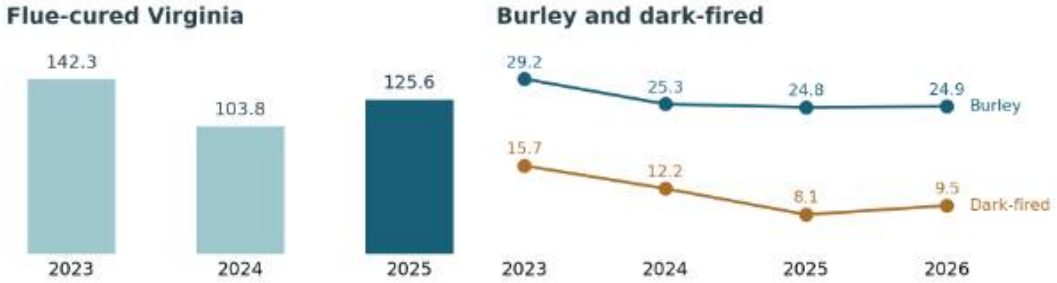
Marcilio Drescher, ITGA and Afubra President, Annual General Meeting, Dortmund, Germany, September 2026.

United States

United States

Tobacco Growers Association of North Carolina (TGANC) / Burley Stabilization Corporation (BSC)

When US flue-cured Virginia markets opened in late July, buyers were looking for clean, ripe leaf from the bottom of the stalk. It was precisely the tobacco growers were finding hardest to cure. An exceptionally hot, dry June had given way to severe storms and 19 days of rain in July. Heat and dry weather returned in August and September. Harvest ran about two weeks late, and deliveries were slow.



New Asian buyers take an interest in Virginia

For Virginia growers who could deliver the leaf buyers wanted, the selling season offered some encouragement. Prices edged above 2025 levels, and growers attributed much of the demand for lower-stalk tobacco to the US duty drawback programme. New Asian customers bought from the crop. China, absent from the 2025 market amid tariff disputes, continued to express interest. Growers rated the season satisfactory despite the difficulties in the field.

Virginia had recovered to 125.6 million kg in 2025 after falling to 103.8 million kg the year before. The 2026 national harvested area across all tobacco types barely changed, edging up from 69,320 to 69,650 hectares. Within that total, the experience of a Burley grower differed considerably from that of a Virginia grower selling into stronger demand.

More Burley hectares for much the same crop

Burley families planted an additional 851 hectares in 2026 and brought in just 138 more tonnes. That works out to about 2,069 kg per planted hectare, down from 2,213 kg a year earlier. Excessive early rain gave way to drought and extreme heat. Later, high temperatures and low humidity made curing difficult. With fewer kilograms coming off each hectare, rising labour and fuel bills were harder to cover.

US leaf production, million kg

The latest reported Virginia volume is for 2025. The updated US submission extends the Burley and dark-fired series through 2026.



Graham Boyd, TGANC, ITGA Annual General Meeting, Dortmund, Germany, September 2026.

United States | Outlook

United States

What reached the market

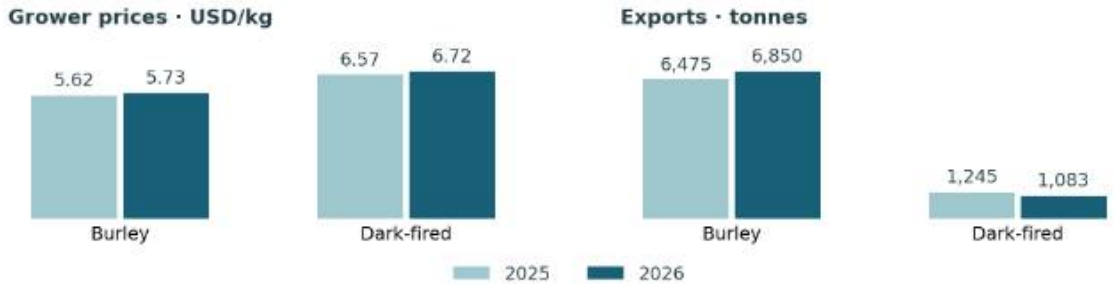
Burley growers received an average of USD 5.73 per kg, 11 cents more than in 2025. The increase was too small to offset the loss of yield. Applying the reported prices to output per planted hectare gives an indicative gross crop value of about USD 11,850 per hectare, down from USD 12,440, before labour, fuel or other costs. Burley exports nevertheless rose by almost 6%, reaching 6,850 tonnes.

Dark-fired tobacco held its quality better through the heat. Early flooding cost growers some acreage, yet the planted area rose from 2,428 to 2,833 hectares and production reached 9,507 tonnes, up 17%. The grower price rose by 15 cents per kg. Export volumes moved the other way, falling 13% to 1,083 tonnes. Growers were generally pleased with the quality they delivered but saw a longer-term threat to demand as alternative products gained ground.

Outlook for 2027

The US submission projects a larger crop from fewer families in both Burley and dark-fired tobacco. For Burley, reaching 26,000 tonnes on the projected 11,500 hectares would require about 2,261 kg per planted hectare, roughly 9% above the 2026 result. Weather during growing and curing will help determine whether families can recover that lost yield.

Burley and dark-fired growers gave the coming season a neutral rating overall. Virginia growers were more optimistic. They see scope for further export sales and a possible return to significant Chinese contracting in 2027. On the farm, the cost and availability of labour remain pressing concerns, making discussions over the H-2A guest-worker programme particularly relevant to their plans.



US crop indicators	Burley 2026	Burley 2027 est.	Dark-fired 2026	Dark-fired 2027 est.
Growing families	975	925	315	300
Planted area (ha)	12,060	11,500	2,833	2,900
Production (tonnes)	24,947	26,000	9,507	10,000
Grower price (USD/kg)	5.73	5.84	6.72	6.83



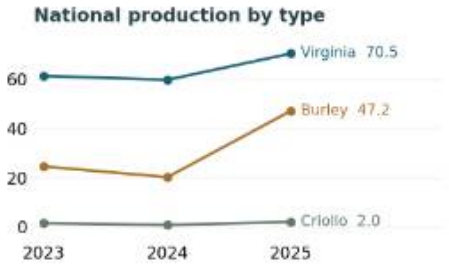
Daniel Green, BSC, ITGA Annual General Meeting, Dortmund, Germany, September 2026.

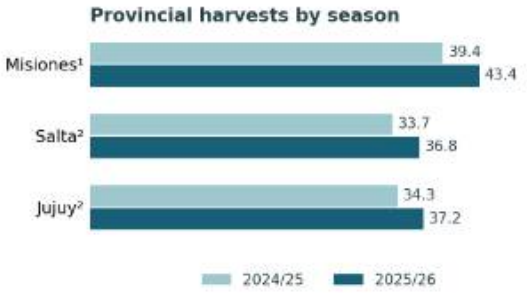
Argentina

Argentina

Cooperativa de Productores Tabacaleros de Salta Ltda. (COPROTAB); Cooperativa Agroindustrial de Misiones Limitada (CTM); Cooperativa de Tabacaleros de Jujuy (CTJ)

In Misiones, a hectare of Burley yielded around 400 kg more than its historical average in 2025/26. With leaf prices keeping pace with inflation, those extra kilos helped make it a good season for growers. In Salta and Jujuy, Virginia prices rose faster than inflation and the harvest grew, yet growers gave the season a more guarded verdict. Much depended on where the hail fell.





Three provinces bring in a larger crop

Together, Misiones Burley and Virginia from Salta and Jujuy reached 117.35 million kg, up 9.3% in a year. Misiones recorded the largest gain, adding just over 4 million kg. Salta and Jujuy each added roughly 3 million kg and finished within half a million kg of one another.

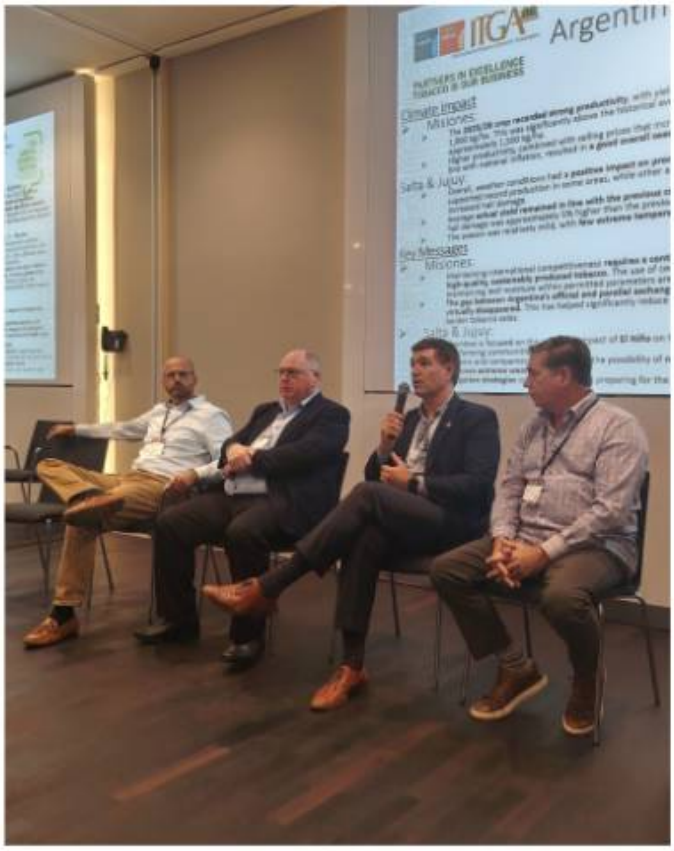
Selling the crop

Nearly 12,000 families grew Burley on 23,973 hectares in Misiones. Growers reported yields of around 1,900 kg/ha against a historical benchmark of 1,500 kg/ha, and the crop averaged USD 2.27 per kg. As Argentina's official and parallel exchange rates converged, informal cross-border sales declined. For growers supplying export markets, the provincial report singles out two decisions that affect the leaf buyers receive: choosing certified seed and keeping moisture within the permitted range.

In the northwest, well-timed rain helped some districts achieve record crops. Others suffered repeated hailstorms, with losses estimated at 15-21% in affected areas. Across Salta and Jujuy, growers reported actual yields broadly in line with the previous crop. They estimated yields would have been about 5% higher year on year after adjusting for hail damage. That uneven experience helps explain why Virginia growers rated the season neutral while their counterparts in Misiones were satisfied.

Tobacco production, million kg

¹ Burley. ² Flue-cured Virginia. The national series ends in 2025. The provincial comparison covers the three crops reported for 2025/26.



German Martos, COPROTAB, ITGA Annual General Meeting, Dortmund, Germany, September 2026.

Argentina | Outlook

Argentina

Virginia sales and the cost of growing tobacco

Salta and Jujuy reported Virginia exports of 62.9 million kg in 2025/26, up from 57.9 million kg a year earlier. Each province accounted for close to half of the total. Grower price increases exceeded expectations in both, although farmers still faced the cost of financing another season.

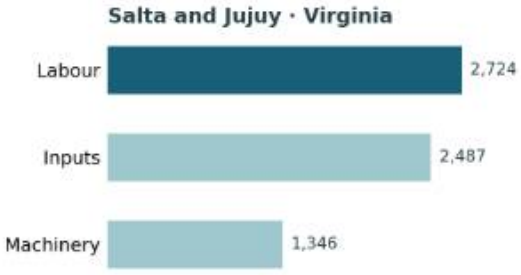
The provincial budgets show how much capital a family has to commit to a hectare of leaf. In Misiones, inputs and labour together accounted for 85% of the USD 2,678 Burley budget. In the northwest, labour alone cost USD 2,724 per hectare of Virginia, equivalent to 95 workdays. Machinery added 35 hours per hectare, bringing the Virginia budget to USD 6,557 once inputs were included.

Outlook for 2026/27

Misiones expects around 12,500 families to plant 24,500 hectares of Burley, up from 11,984 families and 23,973 hectares. Growers see good prospects, although dearer fuel raises the cost of inputs and freight. The timing of El Niño rains is a particular concern. Storms late in the season could reach the crop while it is still in the field or curing in barns.

In Salta and Jujuy, early rain could help young Virginia plants establish where irrigation water is scarce. The same forecast brings a risk of further severe storms later on. The two provinces each estimate a crop of 36 million kg, taking combined output to 72 million kg, about 2.6% below 2025/26. For growers with limited capital after hail losses, the prospect of a wetter start is welcome, but the outlook remains only cautiously positive.





2025/26 Virginia crop	Salta	Jujuy
Growing families	1,625	1,000
Planted area (ha)	19,205	12,600
Exports (million kg)	31.3	31.6
B1F grower price (USD/kg)	3.08	3.14

B1F is a Virginia reference grade. The quoted prices exclude the FET premium.

Reported production costs by item, USD per hectare



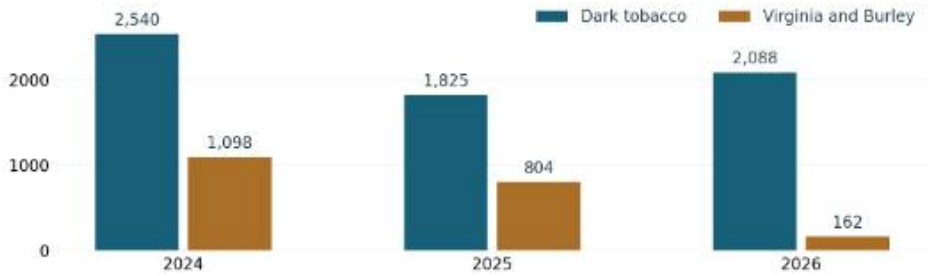
CTJ and Camara del Tobacco Jujuy, ITGA Americas Regional Meeting, Jujuy, Argentina, April 2025.

Colombia

Colombia

Fedetabaco

When Suntrust Group SAS began buying Colombian tobacco in 2023, many Virginia and Burley growers borrowed to maintain or upgrade their drying and curing facilities. Three years later, the company announced it would stop buying. For an estimated 470 growers affected by the decision, the immediate question is who will contract their leaf. For those who borrowed, the loans still have to be repaid.



Dark leaf gains ground

The change in Colombia's harvest was already striking in 2026. Virginia and Burley together fell from 804 tonnes to 162 tonnes in a single season. Dark tobacco gained 263 tonnes over the same period, cushioning the decline in the national crop. Of the 2,250 tonnes Colombia produced, nearly 93% was dark leaf, up from 69% a year earlier.

Who is still growing tobacco?

Behind those volumes were two quite different planting decisions. The number of families growing Virginia and Burley fell from 291 to 58, and the area they planted contracted from 304 to 81 hectares. Dark tobacco drew more families into production. Its grower base rose from 1,373 to 1,486, and its area expanded by 83 hectares. By 2026, dark tobacco occupied 1,044 of Colombia's 1,125 planted hectares.

Weather added to the strain. The Colombian submission describes an exceptionally intense summer linked to El Niño, with losses in both productivity and leaf quality. Across the two leaf categories, the reported crop was 14.4% smaller than in 2025. The consequences for an individual family depended as much on the tobacco it grew and the buyer it could reach as on conditions in its fields.

Colombian tobacco production by leaf type, tonnes



Heliodoro Campos, Fedetabaco, ITGA Americas Regional Meeting, Santa Cruz do Sul, Brazil, May 2026.

Colombia | Outlook

FEDETABACO

Colombia

Selling the crop

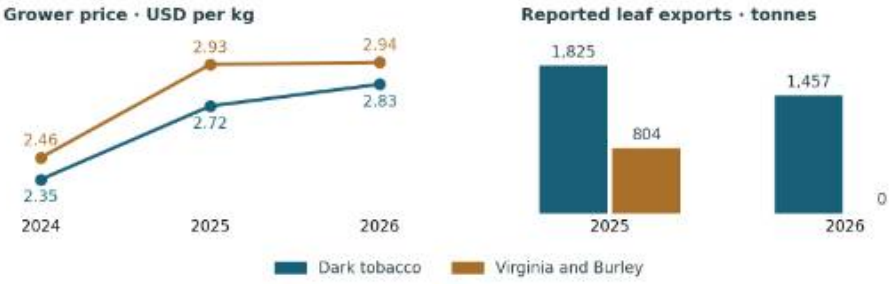
For a Virginia or Burley grower who found a buyer, the average price in 2026 was USD 2.94 per kg, one cent more than the previous year. The near-steady price gives little sense of how far the market had narrowed. The country reported 804 tonnes of Virginia and Burley exports in 2025 and none in 2026. Suntrust's departure followed the earlier withdrawals of BAT and Philip Morris, leaving growers with fewer routes to market.

Dark tobacco growers received USD 2.83 per kg, up 11 cents in a year. Their harvest grew by 14%, but reported exports fell from 1,825 to 1,457 tonnes. That left exports equivalent to about 70% of the 2026 dark crop. The submission does not identify how much of the balance went to domestic buyers or remained in stock.

Outlook for 2027

Colombian growers gave the 2026 season the lowest satisfaction rating on ITGA's five-point scale. Even so, they rated the outlook for 2027 good. Their planting figures envisage a modest increase to 1,138 hectares, with dark leaf continuing to account for most of the crop.

The country submission also warns that losing Suntrust could reduce national production by 30%. It gives no timetable for that risk, while its 2027 crop estimate of 2,276 tonnes implies a 1.2% rise. For families with money tied up in curing facilities, the clearest sign of recovery will be a contract that lets them put those facilities back to work.

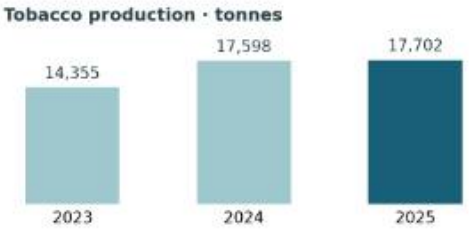


Colombian crop indicators	2026 reported	2027 estimate
Growing families	1,544	1,567
Planted area (hectares)	1,125	1,138
Virginia and Burley (tonnes)	162	172
Dark tobacco (tonnes)	2,088	2,104
Total production (tonnes)	2,250	2,276

Dominican Republic

Intabaco

In the Dominican Republic, much of the tobacco that growers deliver leaves the country as a finished cigar. The country submission puts that share at nearly three-quarters of production, with a further 22% exported as unmanufactured leaf. A smaller share goes into Andullo, a traditional form of tobacco processing. It was growers supplying this last trade who expanded their plantings most in 2025/26, even as the national tobacco area fell.





The leaf behind the cigar trade

Havanensis accounted for 11,439 tonnes of the 17,702 tonnes harvested in 2024/25. More than 2,000 families grew it on 6,105 hectares. Olor supplied another 3,349 tonnes. Together, the two types made up nearly 84% of the crop, leaving Criollo, Andullo, wrapper leaf and a small Burley planting to account for the balance.

After a sharp rise in 2024, national production grew by just 104 tonnes in 2025. Prices continued to rise: growers received an average of USD 3.33 per kg, up from USD 3.15 a year earlier and USD 2.66 in 2023. The 2025 harvest is the latest for which both volume and grower price were available.

Andullo expands as the planted area contracts

Preliminary figures for 2025/26 record 3,266 growing families on 8,472 hectares, down by 230 families and 964 hectares in one season. Havanensis alone lost 553 hectares. Andullo moved in the opposite direction: the number of families growing it doubled from 278 to 557, and its planted area rose from 494 to 876 hectares.



Change in planted area by leaf type, hectares · 2024/25 to 2025/26 preliminary



ITGA Annual General Meeting, Santiago de los Caballeros, Dominican Republic, November 2019.

Dominican Republic Outlook

The cost of growing wrapper leaf

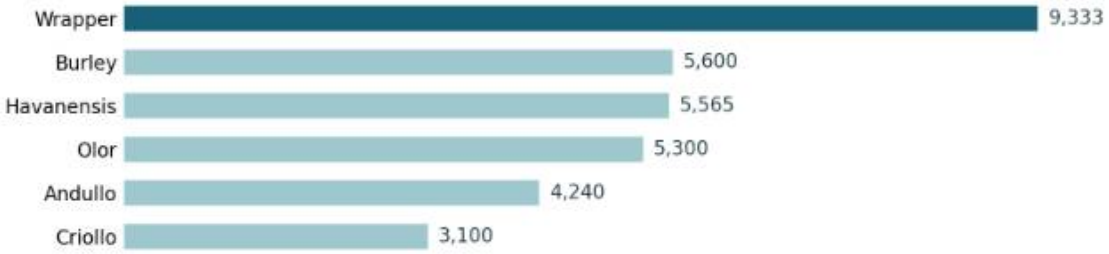
Only 44 families grew wrapper tobacco, or capa, in 2024/25. Their 335 hectares produced 582 tonnes of leaf. Wrapper occupied a modest place in the national harvest, but it required the largest investment per hectare of any type in the Dominican submission. At USD 9,333, a hectare of wrapper cost around three times as much to grow as a hectare of Criollo and 68% more than a hectare of Havanensis.

In 2025/26 the number of wrapper-growing families edged down from 44 to 42, yet the area they planted fell from 335 hectares to just 36. That amounts to less than one hectare per family on average, compared with more than seven the previous season. The figures capture how sharply families scaled back their plantings. Final production and prices for the season were still pending when the report was submitted.

Outlook for 2026/27

The planting programme points to a partial recovery, with 3,452 families expected to cultivate 8,852 hectares. Havanensis is set to occupy 5,538 hectares, almost level with the previous season. The biggest planned change concerns wrapper leaf. The programme envisages 57 families planting 337 hectares, bringing the area back to its 2024/25 level.

Of the 380 additional hectares envisaged nationwide, 301 would come from the recovery in wrapper plantings. For a crop that accounts for only a small share of Dominican leaf, the decisions of those 57 families will have a considerable bearing on how much land returns to tobacco.



National crop indicators	2024/25	2025/26[1]	2026/27[2]
Growing families	3,496	3,266	3,452
Planted area (ha)	9,436	8,472	8,852
Havanensis area (ha)	6,105	5,552	5,538
Wrapper area (ha)	335	36	337

Reported production costs by leaf type, USD per hectare

[1] Preliminary plantings. [2] Planting programme.



Ernesto Perez, Intabaco, ITGA Americas Regional Meeting, Santa Cruz do Sul, Brazil, May 2026.

TE INVITAMOS A CONOCER CIGARRO DOMINICANO

ÚNICA REVISTA INTERNACIONAL DE TABACOS & CIGARROS HECHA EN REPÚBLICA DOMINICANA PARA EL MUNDO



¡SCANEA EL CÓDIGO QR Y DISFRÚTALA!

Asia & Europe



India

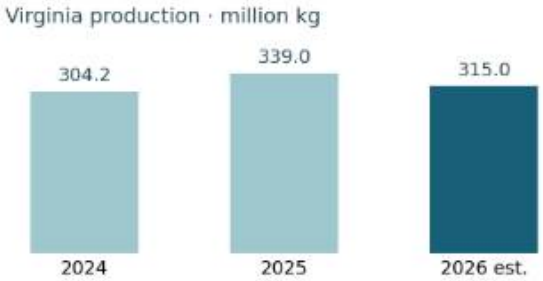
Bulgaria

North Macedonia

India

Tobacco Institute of India (TII)

Below-average rainfall gave Indian growers a brighter flue-cured Virginia crop in 2025/26. About 15% of the leaf was pale, and a smaller share fell into the lower grades. At the auction floors in Andhra Pradesh and Karnataka, however, even the better grade mix offered little protection. Global supplies were plentiful, domestic demand was subdued and buyers were slow to take up the crop.





A smaller harvest meets a softer market

India estimated its Virginia harvest at 315 million kg, down from 339 million kg the previous year. The number of growers barely changed, at around 86,000, while the area they planted fell from 191,334 to 176,113 hectares. National output per planted hectare held close to 1,790 kg. What changed much more for a family selling its crop was the price each kilogram earned.

With the season still under way, the average grower price stood at an estimated USD 2.41 per kg. A 100 kg lot sold at that average brought USD 51 less than at the previous season's USD 2.92. Growers described uneven prices as well as slow buying. Sentiment improved from the difficult start, although their assessment of the marketing season remained between dissatisfied and neutral.

More leaf exported at a lower price

Overseas buyers took 155,051 tonnes of unmanufactured Virginia in 2025/26, up from 146,954 tonnes a year earlier. Yet those shipments earned USD 883.2 million, down from USD 895.9 million. The average export value fell from USD 6.10 to USD 5.70 per kg. Exporters sold about 8,100 additional tonnes and still earned nearly USD 13 million less.



Rakesh Koul, Tobacco Institute of India, ITGA Africa Regional Meeting, Harare, Zimbabwe, July 2026.

India | Outlook

India

What goes into a hectare of Virginia

By the time a grower brings leaf to auction, much of the cost is already in the bale. The Indian submission puts the Virginia production budget at USD 4,915 per hectare. Harvesting and curing alone account for USD 1,800, or 37% of the total. Capital, fixed and miscellaneous costs add USD 1,300. The budget illustrates why a price recovery matters even to families who produced a good grade of leaf.

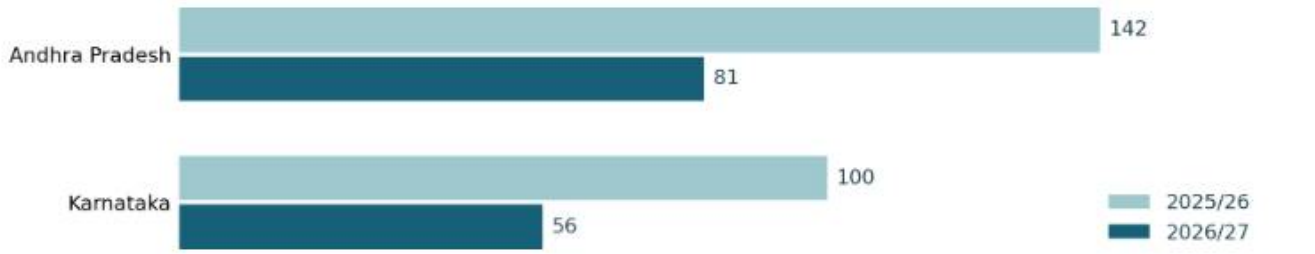
The Tobacco Board cuts authorised volumes

For 2026/27, the Tobacco Board reduced the authorised Virginia crop in Andhra Pradesh by 61 million kg and in Karnataka by 44 million kg. Together, the two states move from 242 million to 137 million kg, a cut of roughly 43%. The aim is to bring supply closer to what buyers will take and give prices room to recover.

Outlook for 2026/27

Growers rated the outlook neutral. The national submission projects a Virginia crop of 150 million kg at USD 3.16 per kg. The 150 million kg figure is a national projection, while the 137 million kg figure is the combined authorised volume for the two states. On the national figures, the projected price rises by 31%, but the volume available to sell falls by more than half.

At those volumes and prices, the indicative gross value of the national Virginia crop would fall from about USD 759 million to USD 474 million before costs. For growers, that is the practical question behind the next auction season: how much of the income lost on a smaller crop can a better price restore?



National Virginia Indicators	2026 estimate	2027 projection
Growers	85,844	85,000
Planted area (hectares)	176,113	83,863
Production (million kg)	315	150
Average grower price (USD/kg)	2.41	3.16

Authorised flue-cured Virginia crop by state · million kg



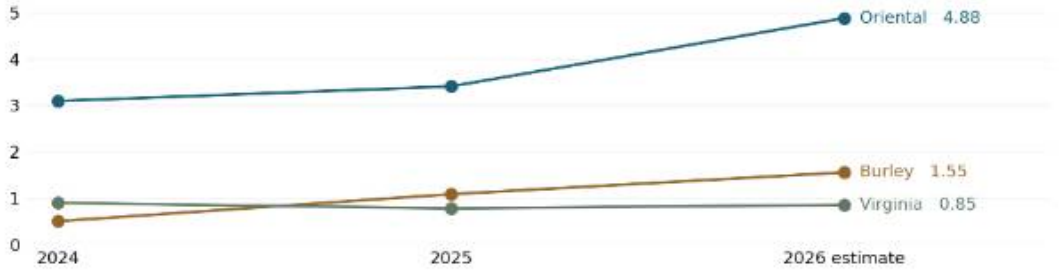
Murali Babu, FAIFA, India, ITGA Vice President

Bulgaria

Bulgaria

NAT2010

Bulgaria's tobacco growers spent much of 2026 waiting for a change in the weather. In summer, they needed rain as heat and water shortages took a toll on yields. In autumn, they needed dry days to finish picking and curing the leaf, but humidity stayed unusually high. Growers nevertheless reported that quality held up. By the end of the marketing season, they rated their experience satisfactory.



Oriental accounts for most of the extra leaf

Bulgaria's preliminary figures put the crop at 7.28 million kg, up from 5.26 million kg in 2025. Nearly three-quarters of the additional leaf came from Oriental tobacco. Its estimated 4.88 million kg harvest was 43% larger than a year earlier and accounted for two out of every three kilograms grown in Bulgaria.

Burley grew just as quickly from a smaller base. Production rose from 1.08 million to 1.55 million kg, more than three times the volume recorded in 2024. Flue-cured Virginia also recovered some ground, reaching an estimated 849 tonnes after 774 tonnes in 2025. It remained slightly below its 2024 harvest of 892 tonnes.

From the summer field to the drying barn

Bulgaria's harvest usually runs from July to October, with deliveries following in November and December. That calendar left little room for delay when autumn humidity slowed drying and processing. The larger national crop also tells only part of the story for individual growers. More land went into tobacco, while farms exposed to drought and uneven rainfall reported losses in yield. Preserving leaf quality through the damp autumn was one reason growers viewed the season favourably.



Tsvetan Filev, NAT2010, ITGA Oriental Tobacco Forum, Prilep, North Macedonia, October 2026.

Bulgarian tobacco production by leaf type - million kg

Bulgaria | Outlook

Bulgaria

The farms behind the harvest

Of the 8,568 growers recorded in 2026, 8,000 cultivated Oriental tobacco. Between them they planted 3,550 hectares, or about 0.44 hectares per grower. Virginia had a very different footprint. Just 20 growers planted 451 hectares, an average of 22.6 hectares each. Burley fell between the two, with 548 growers cultivating 529 hectares.

Burley added 58 growers and 145 hectares in a year. Oriental added 158 growers and 306 hectares, while Virginia's grower count held steady and its area contracted by 31 hectares. Across all three types, the planted area reached 4,530 hectares. The spread of Oriental across so many small holdings gives changes in its purchase price particular importance for Bulgaria's growing families.

What buyers paid for each type

Oriental fetched the highest average grower price in 2025, the latest year with price figures. Its average rose by 8.4% from 2024, compared with 2.8% for Virginia. Burley's average was unchanged. Without 2026 purchase prices, it is too early to say how much of the larger harvest translated into additional income for growers.

Outlook for the next crop

Bulgarian growers rated the outlook good. Their submission calls for closer ties with growers in other producing countries, both to share farming practices and to press for fair conditions for selling leaf. They also want growers involved early in regulatory discussions, while the people who depend on the crop can still help shape the decisions that affect their farms.





Leaf type	2025 production	2026 estimate	Volume change
Oriental	3,407 tonnes	4,880 tonnes	+43.2%
Burley	1,081 tonnes	1,550 tonnes	+43.4%
Flue-cured Virginia	774 tonnes	849 tonnes	+9.7%
All three types	5,262 tonnes	7,279 tonnes	+38.3%

Growers and planted area by leaf type · 2026

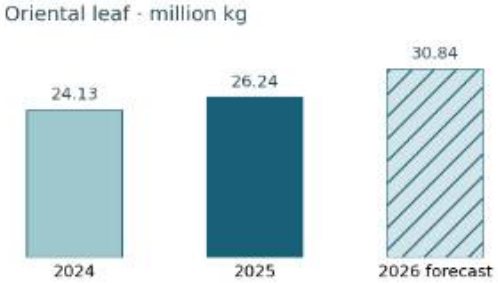


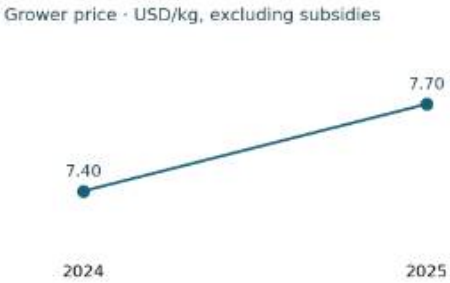
Government Roundtable, Sofia, Bulgaria, October 2026.

North Macedonia

Union of Tobacco Producers - Maka na Tutunoberacite, Prilep

By mid-September, growers in parts of North Macedonia without irrigation had finished picking their Oriental tobacco. Where water was available, families continued harvesting until the end of October. That difference of roughly six weeks was one of the clearest effects of a long, hot summer. Growers reported that drought reduced the weight of leaf they could harvest per hectare, even as the heat helped produce a better-quality crop.





A longer harvest where water was available

Growers usually transplant from the beginning of May to mid-June, and picking can begin as early as mid-June. In the season described by the growers' union, irrigation allowed some farms to continue beyond the usual mid-October finish. Families on rain-fed land had already lost several weeks of picking by then. Despite those yield losses, growers rated the marketing season satisfactory, citing the quality of the leaf they brought in.

From the field to the buying point

Deliveries generally run from mid-December to the end of February. For the 2025 crop, growers received an average of USD 7.70 per kg before subsidies, up from USD 7.40 in 2024. A 100 kg delivery at the average price therefore brought USD 30 more than a year earlier. These are the latest reported prices. What buyers will pay for the larger 2026 crop remains open.

The country submission identifies the leaf as Prilep Oriental. From 24.13 million kg in 2024, production rose to 26.24 million kg in 2025. The next increase is expected to be larger: the 2026 forecast of 30.84 million kg would add 4.60 million kg in a single season.



Kiro Ristevski, Maka na tutunoberacite - Prilep, ITGA Oriental Tobacco Forum, Prilep, North Macedonia, October 2026.

North Macedonia Outlook

СОЈУЗ НА ТУТУНОБЕРАЧИТЕ ПРИЛЕП

North Macedonia

More families on slightly smaller plots

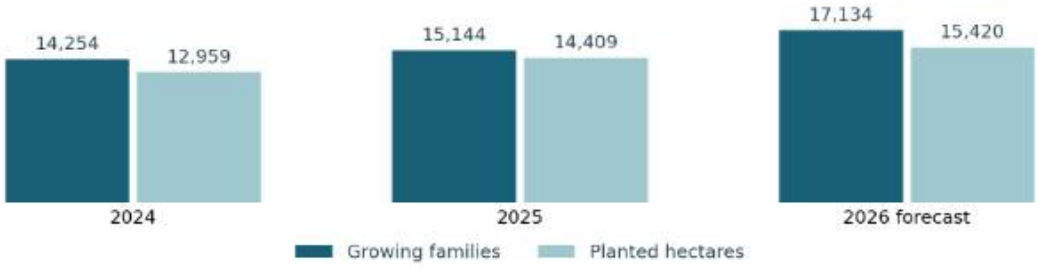
Nearly 2,000 additional families are counted in the 2026 forecast. Their inclusion takes the total to 17,134, a 13% increase in one year. The planted area rose more slowly, by 1,011 hectares, or 7%. Spread across all growers, the average holding devoted to tobacco comes to 0.90 hectares, down from 0.95 hectares in 2025.

The projected harvest also assumes more leaf from each planted hectare. Dividing the 2026 forecast by the planted area gives about 2,000 kg per hectare, compared with 1,821 kg in 2025. The difference matters when reading the forecast: extra land accounts for only part of the projected 17.5% rise in output. The rest depends on the harvest that families can bring in from that land.

Outlook for the next crop

Growers rated their prospects good, while raising a concern about the pace of expansion. An individual family may gain from a larger harvest. If many families expand at once and buyers have little need for the extra leaf, the purchase price can fall across the market. For families cultivating less than a hectare on average, the price paid per kilogram matters as much as the size of the national crop.

For growers weighing up the next planting, the season leaves two practical questions. Can they count on enough water to keep picking through autumn, and how much Prilep leaf will buyers need when deliveries begin?



Oriental crop indicators	2025	2026 forecast
Production (million kg)	26.24	30.84
Planted area per family (ha)	0.95	0.90
Output per planted hectare (kg)	1,821	2,000
Output per growing family (kg)	1,732	1,800

Per-hectare and per-family figures are calculated from national totals.



ITGA Oriental Tobacco Forum, Prilep, North Macedonia, October 2026.



World Tobacco Growers´ Day 28 oct

Together we grow

28 OCTOBER 2026 | PRILEP, NORTH MACEDONIA

Together in Prilep











World Tobacco Growers' Day 2026, Prilep, North Macedonia.

WTGD 2026 Messages



On October 28, Tobacco Growers' Day, I want to express my appreciation to the families whose livelihoods and stories are rooted in the land. Behind every crop are people who face the sun, the rain, and the uncertainties of each season, with dedication and the hope of reaping the rewards of their efforts.

Anyone familiar with the realities of farming knows that growing tobacco takes knowledge, planning, and hard work. From preparing the soil to selling the crop, months of care and decisions shape the family's future. This commitment deserves recognition every day, especially when it is time to sell the harvest.

Valuing growers means recognizing the quality of their tobacco and respecting its grade when it is sold. It means building transparent relationships, honoring agreements, and ensuring that farmers have a voice. No supply chain can thrive in the long term unless growers have the conditions they need to continue farming with dignity.

This belief guides Afubra's work. We stand beside our members, defending their interests, supporting them through adversity, and encouraging farm diversification. We want families to be able to plan, invest, and offer opportunities to younger generations. Passing the farm on to the next generation must be a real possibility, supported by income, quality of life, and confidence in the future.

We must also recognize these families' contributions to their communities. Their work supports local businesses, services, and rural life. When growers prosper, the benefits reach far beyond the farm gate.

As president of Afubra, I reaffirm our commitment to ensuring that growers' voices are heard and their efforts valued. To every tobacco grower, I extend my warmest wishes and gratitude. May the recognition this day brings translate into respect and fair conditions for them to continue farming.

Marcilio Laurindo Drescher
President of Afubra



Union of Tobacco Producers
North Macedonia



COPROTAB
José Javier Aranda



Cooperativa de Tabacaleros
de Jujuy



Tobacco Farmer
Colombia

Follow the full World Tobacco Growers' Day campaign
tobaccoleaf.org/sustainability/world-tobacco-growers-day-2026/



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