

GLOBAL LEAF MARKET OVERVIEW & THE ECONOMIC SIGNIFICANCE OF TOBACCO IN AFRICA

25th October 2023



International Tobacco Growers' Association

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Threats and Opportunities

Cost of production vs Pricing

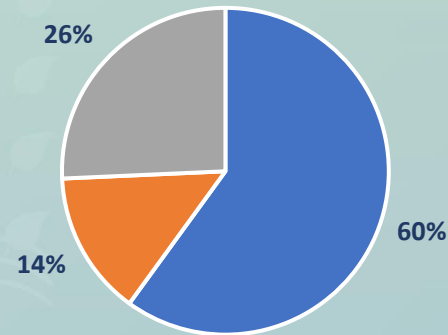
Growers' solvency

Social and environmental issues

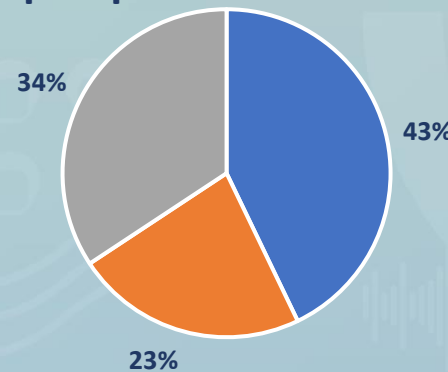
Growing regulatory pressures

Political and economic uncertainty

(ITGA 2023 Market Survey)
Short-term prospects for tobacco growing?



Long-term prospects for tobacco growing?



■ Positive ■ Negative ■ Neutral

Undersupply for main leaf types

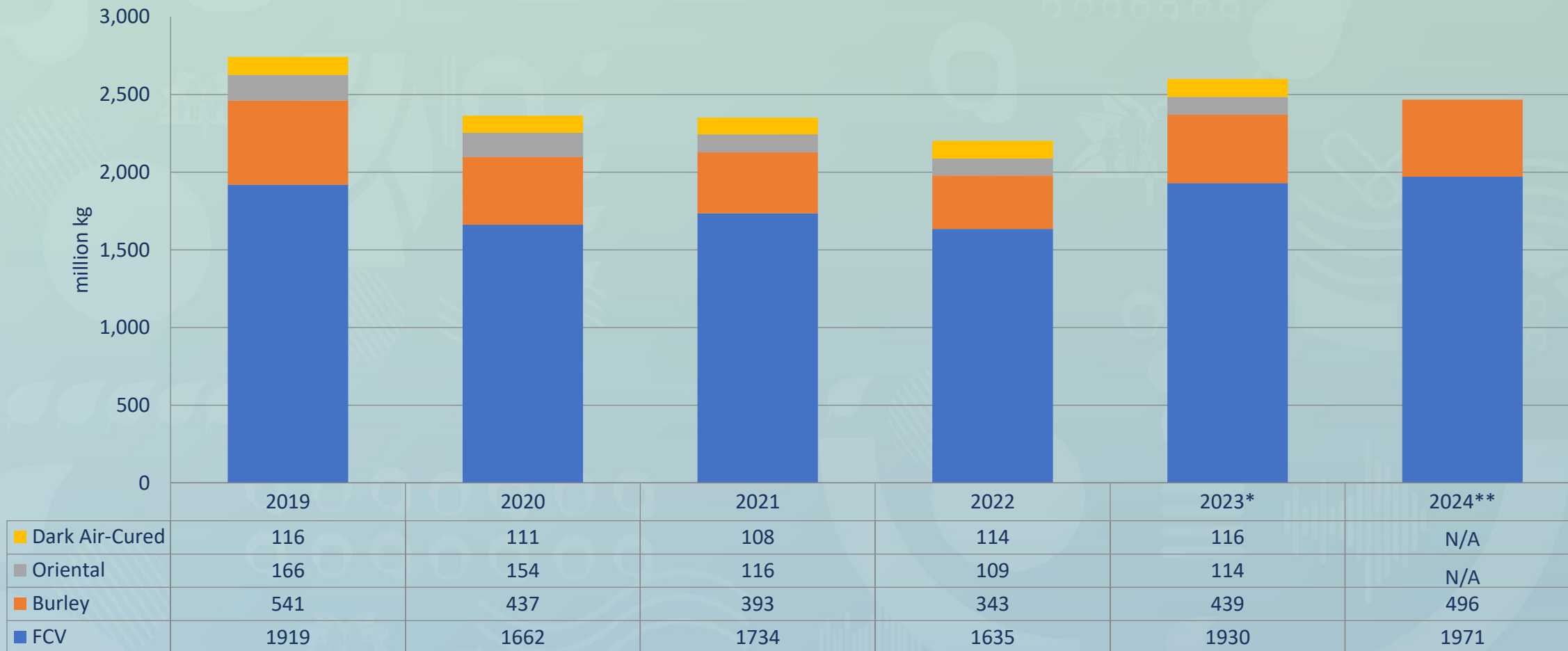
Key markets more robust than expected

Resilient growers likely to have good prospects

New types of products (tobacco leaf requirements?)



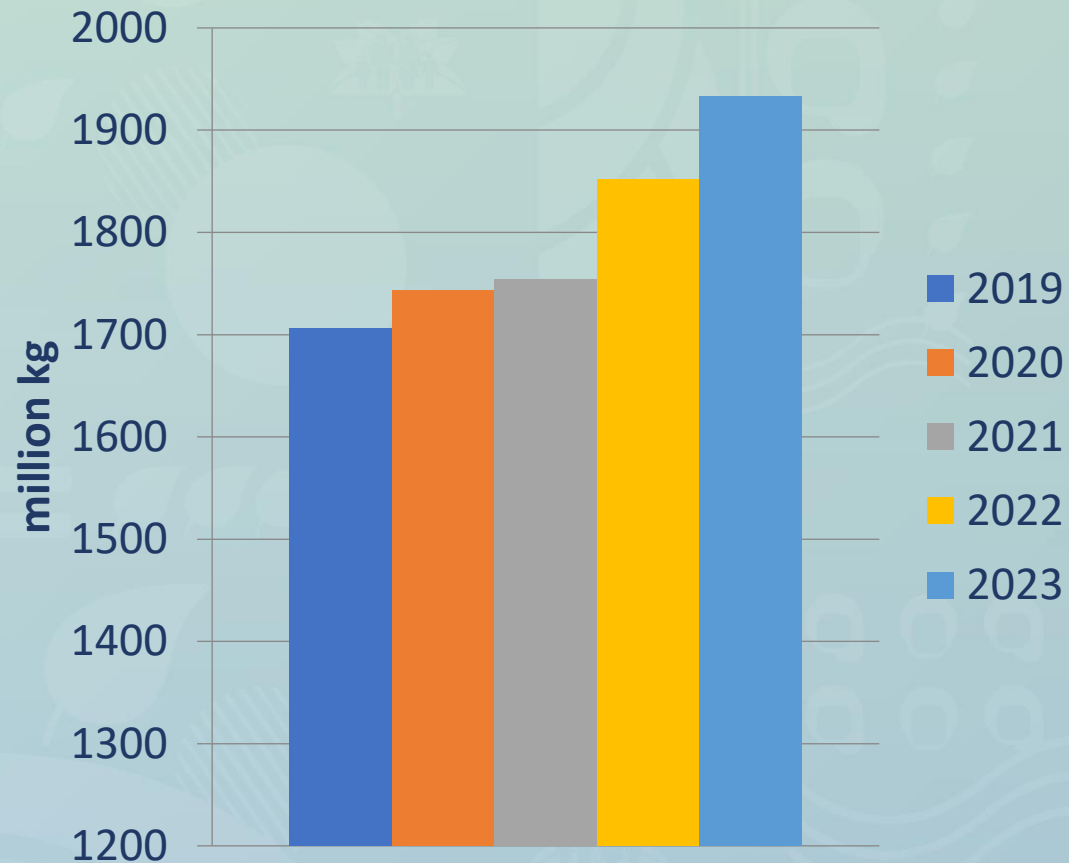
Latest Global Leaf Sales (excluding China)





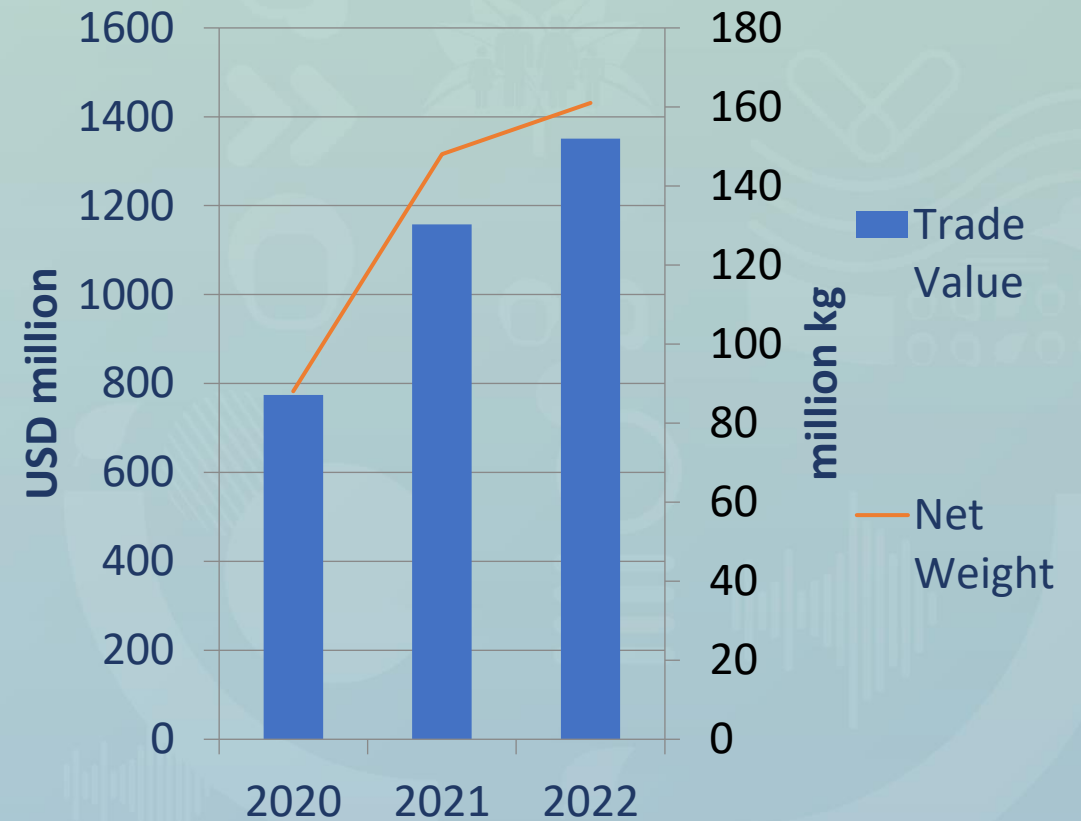
Tobacco Leaf Market in China

FCV Production Volume



Source: Universal Leaf

Tobacco Import Statistics



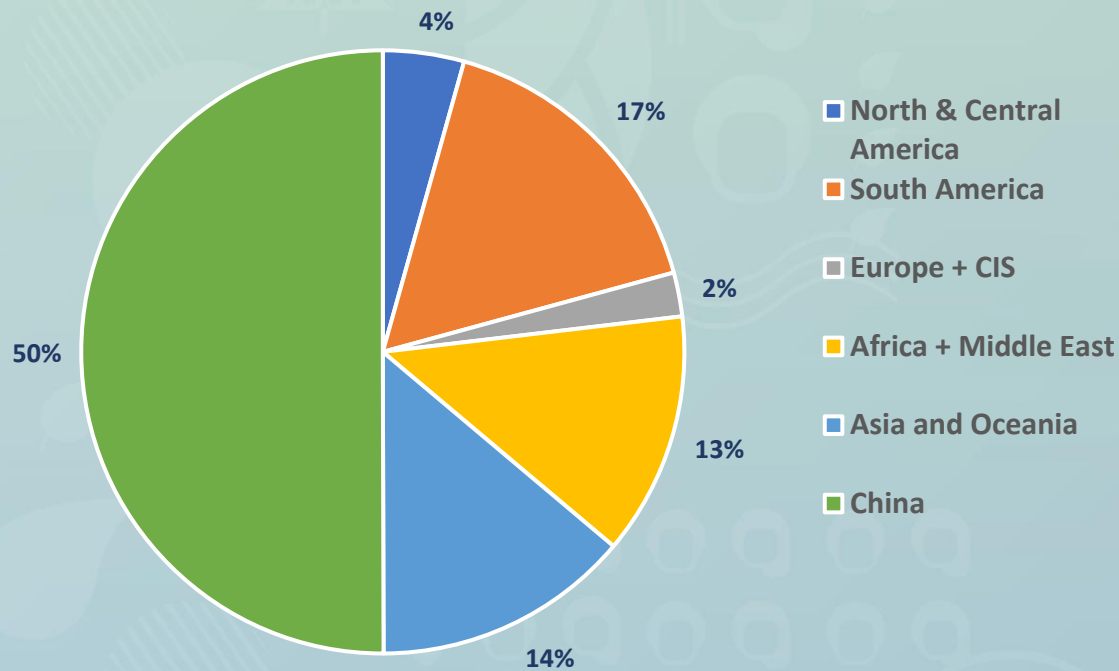
Source: UN Comtrade



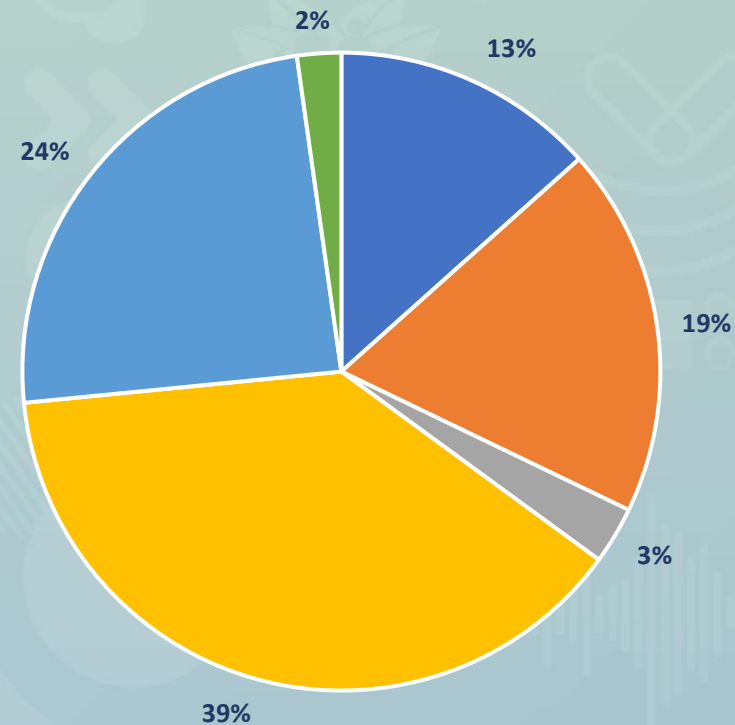
2023 Global Distribution: Leading Leaf Varieties



FCV



Burley





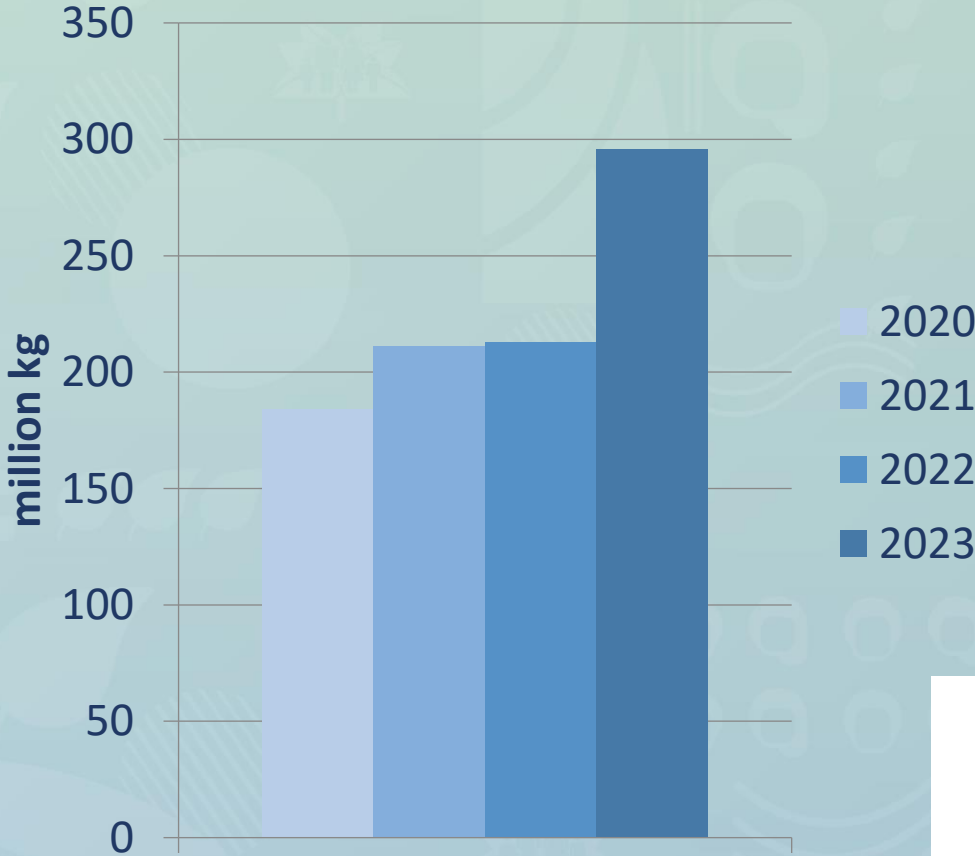
Focus on Africa



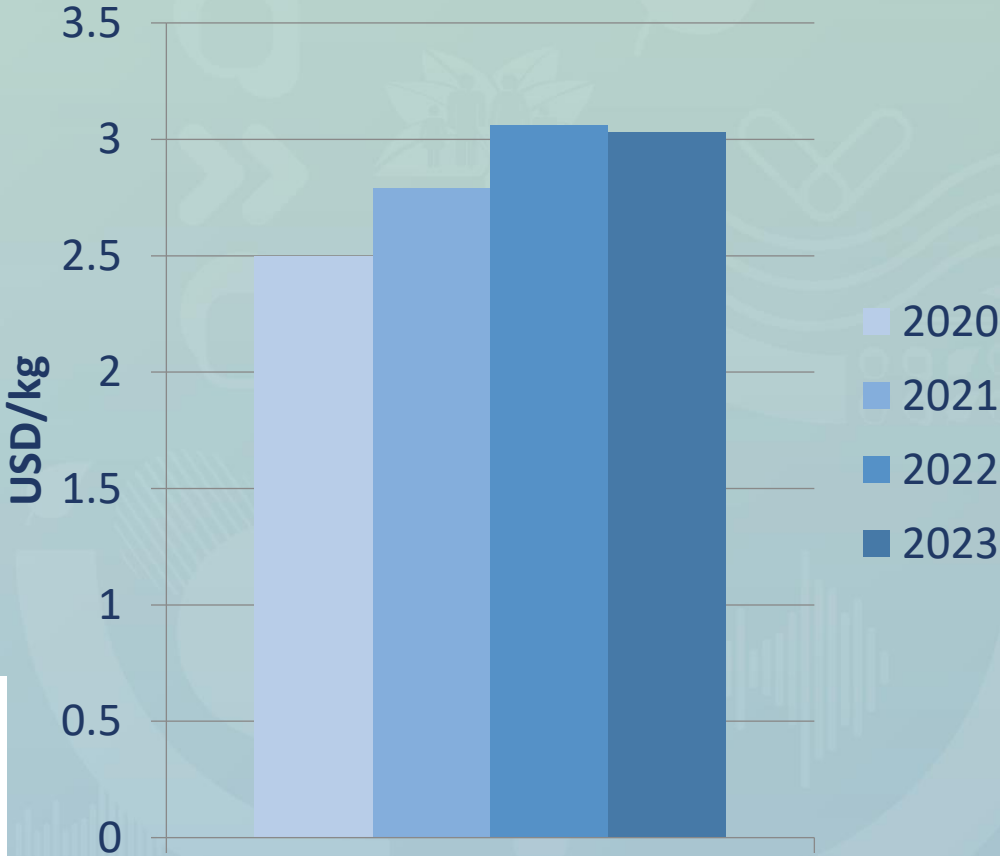
FCV Dynamics in Zimbabwe



Production Volume



Average Prices





Socio-Economic Importance of Tobacco in Zimbabwe



THE SOCIO-ECONOMIC FOOTPRINT OF TOBACCO PRODUCTION IN

ZIMBABWE

MOST VALUABLE DOMESTIC CROP

GENERATES **10%** of the COUNTRY'S FOREIGN CURRENCY

Tobacco
USD 1 billion
Total foreign currency generation
USD 11.1 billion in 2022

50% of ZIMBABWE'S TOTAL AGRICULTURAL GDP

AN ESTIMATED **2 MILLION** PEOPLE WORK DIRECTLY AND INDIRECTLY IN THE TOBACCO VALUE CHAIN

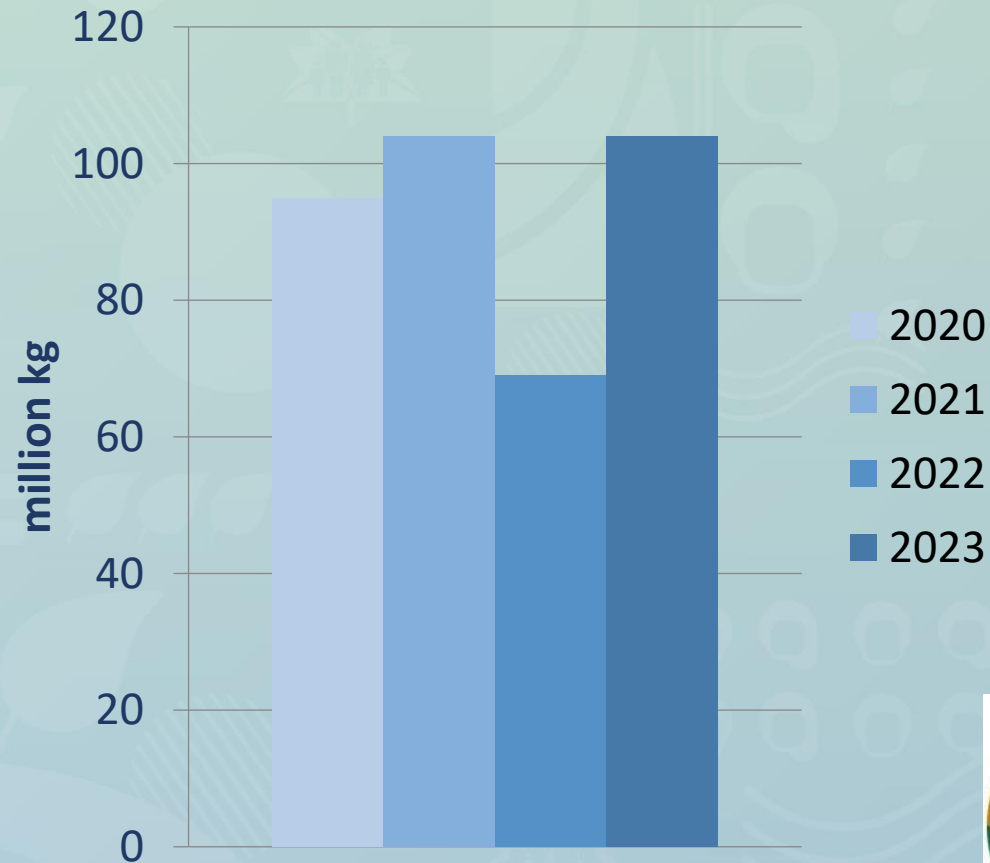
Source: NKC Report, Zimbabwe Tobacco Association ZTA



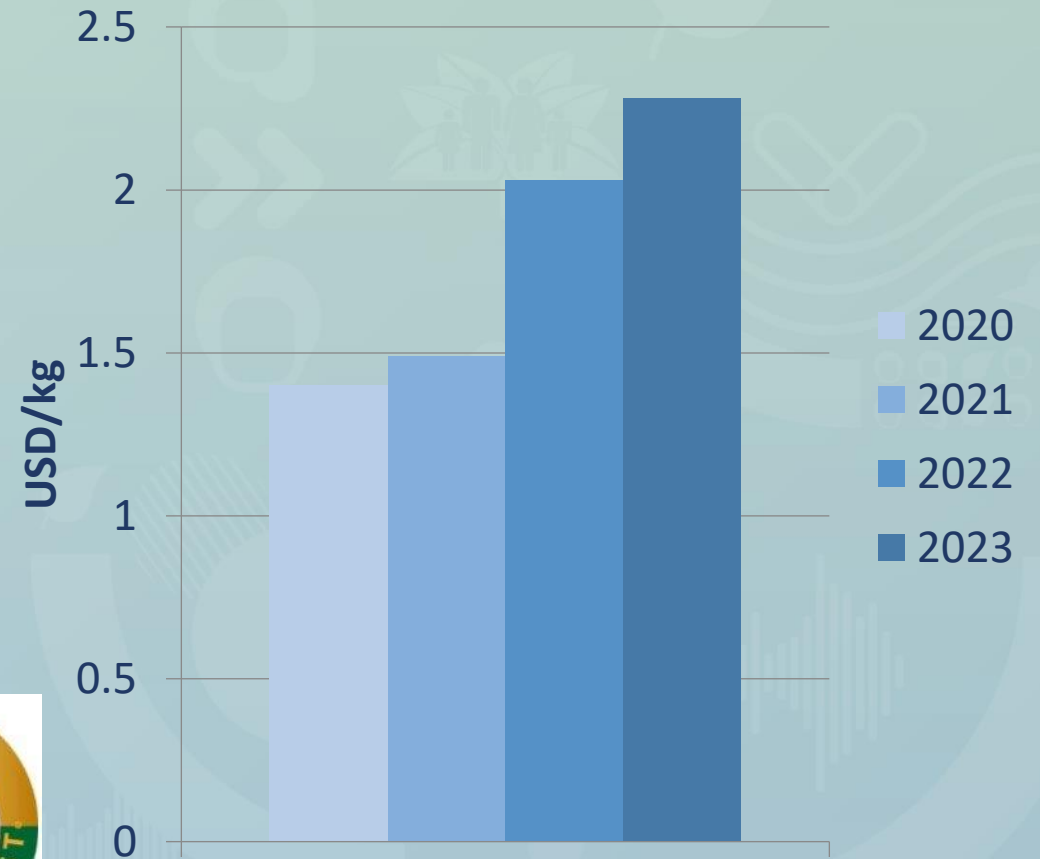
Burley Dynamics in Malawi



Production Volume



Average Prices






Socio-Economic Importance of Tobacco in Malawi





THE SOCIO-ECONOMIC FOOTPRINT OF TOBACCO PRODUCTION IN MALAWI


TOBACCO ACCOUNTS for 44% of MALAWI'S EXPORTS



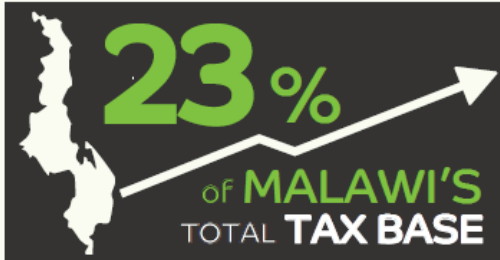
4% of MALAWI'S GDP




1.8 MILLION JOBS DIRECTLY AND APPROX. **5 MILLION JOBS ACROSS THE TOBACCO VALUE CHAIN**



23% of MALAWI'S TOTAL TAX BASE



Malawi is the WORLD'S LEADING EXPORTER of BURLEY TOBACCO



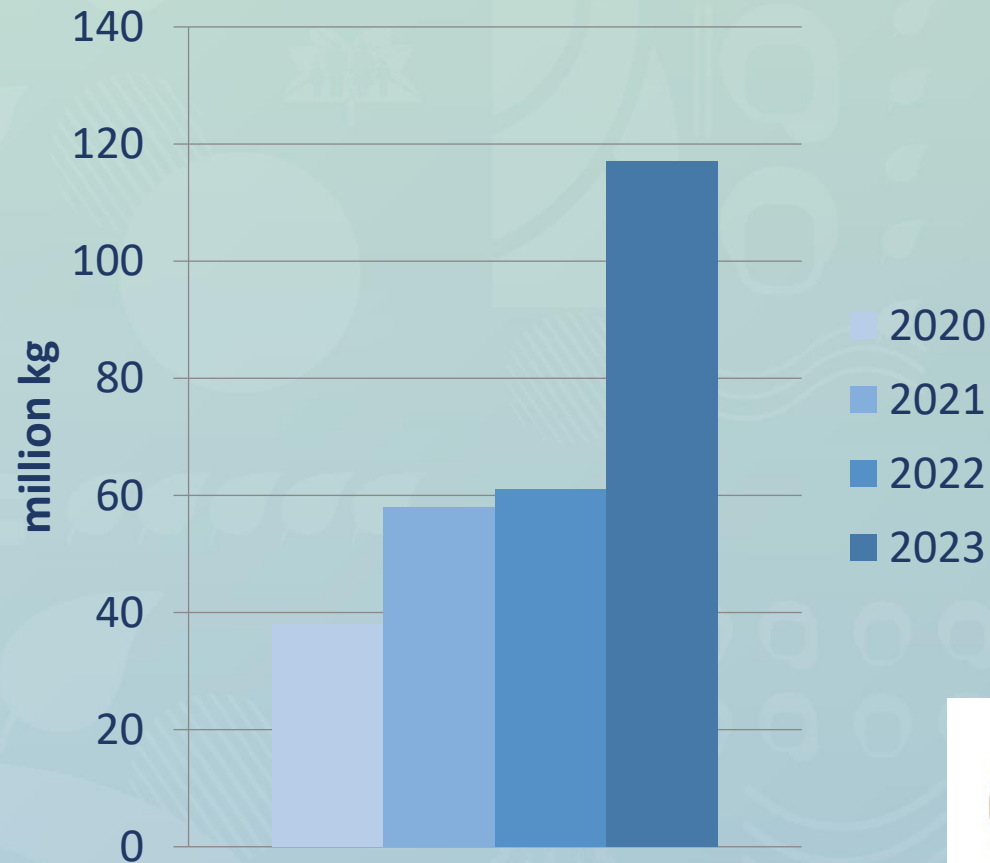
Source: UN Comtrade; TAMA Farmers Trust



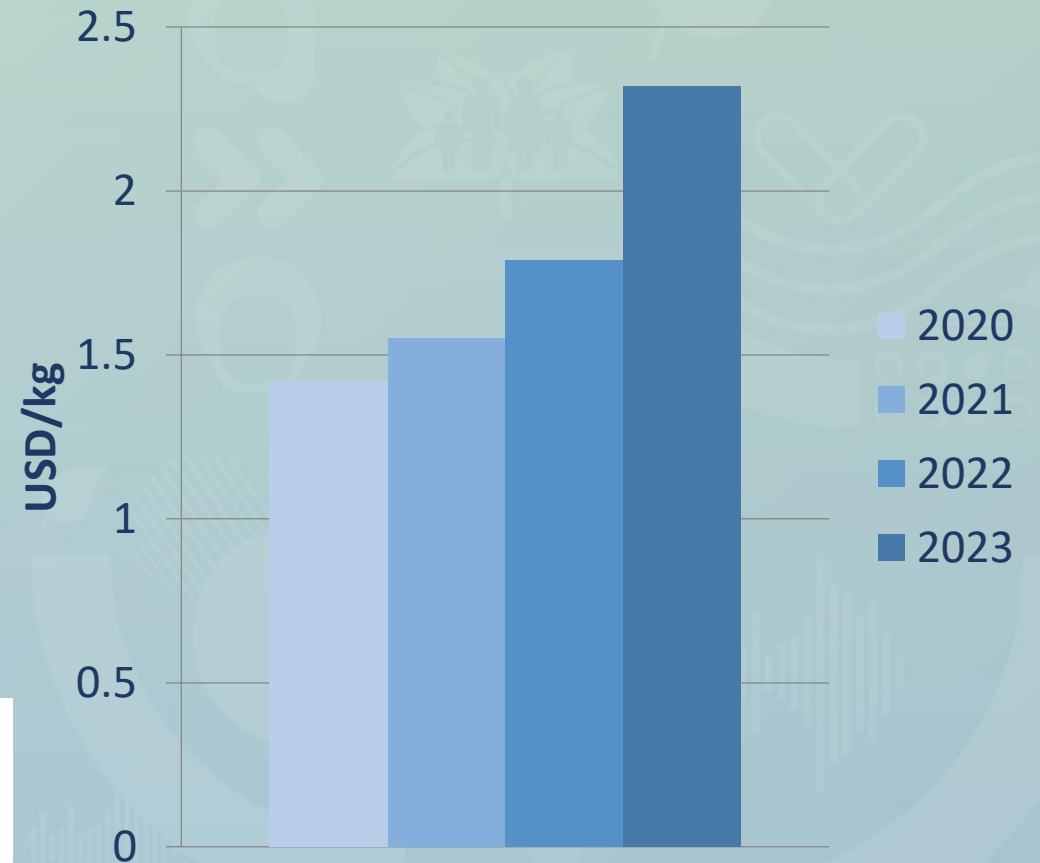
FCV Dynamics in Tanzania



Production Volume



Average Prices





Socio-Economic Importance of Tobacco in Tanzania



THE SOCIO-ECONOMIC FOOTPRINT OF TOBACCO PRODUCTION IN **TANZANIA**



TOBACCO is AMONG THE **LEADING AGRICULTURAL EXPORTS**



TOBACCO GENERATES approx. **US \$178 MILLION** PER ANNUM IN EXPORT VALUE



2.5 MILLION PEOPLE DIRECTLY AND INDIRECTLY INVOLVED IN THE TOBACCO SECTOR



TOBACCO LEAF AND RELATED TOBACCO PRODUCTS **2.6%** of TANZANIA'S export revenue

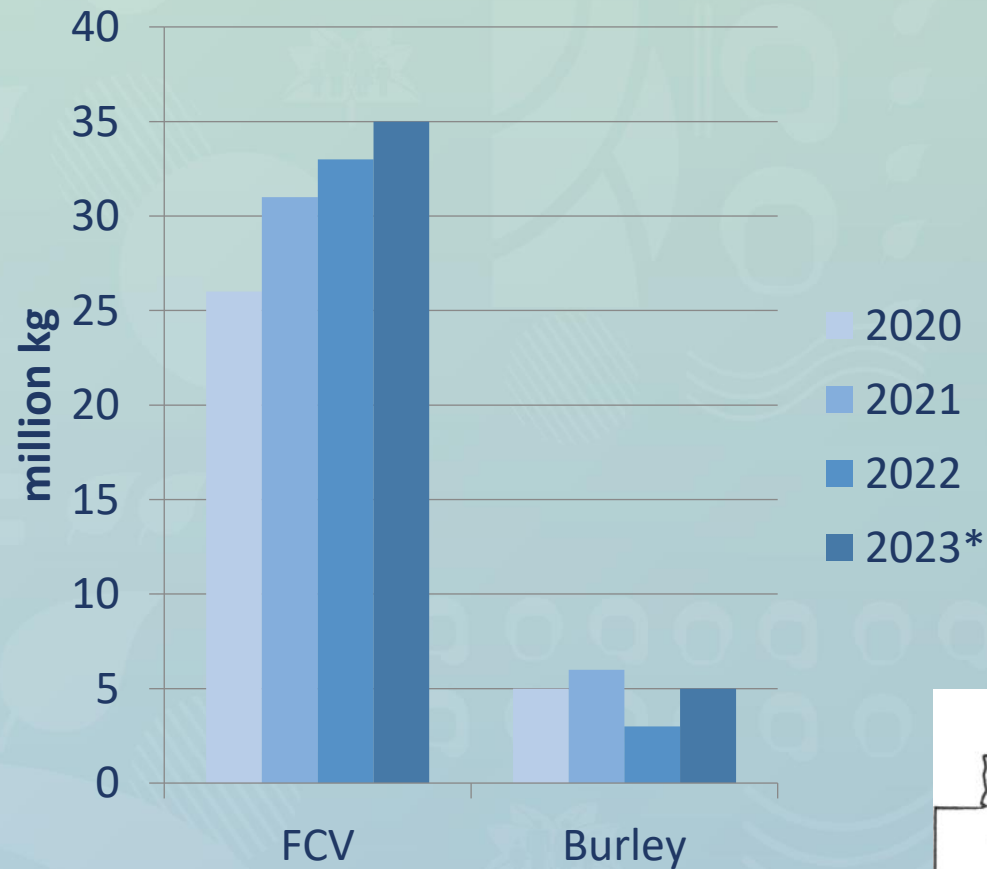


TANZANIA TREATS TOBACCO AS **1 OF 5 STRATEGIC CROPS** (TO ITS ECONOMY AND TO THE LIVELIHOOD OF ITS PEOPLE)

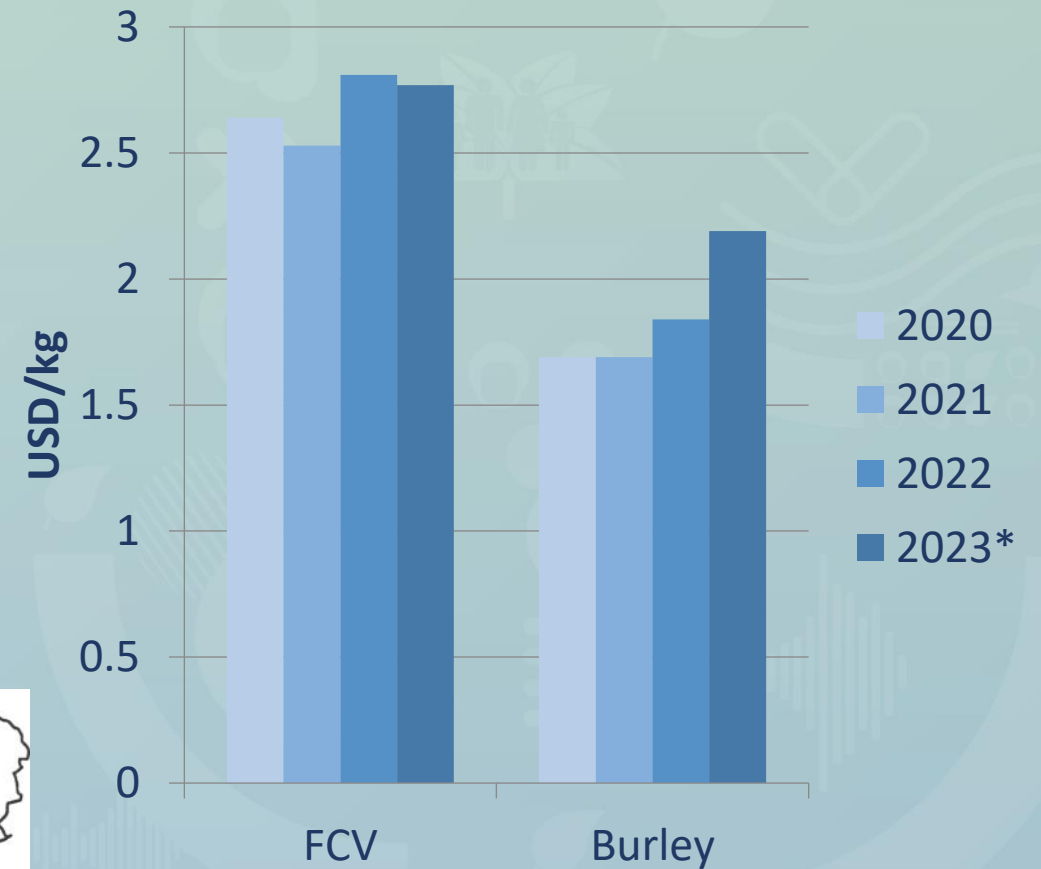


Leaf Dynamics in Zambia

Production Volume



Average Prices



2023* Season is ongoing




Socio-Economic Importance of Tobacco in Zambia

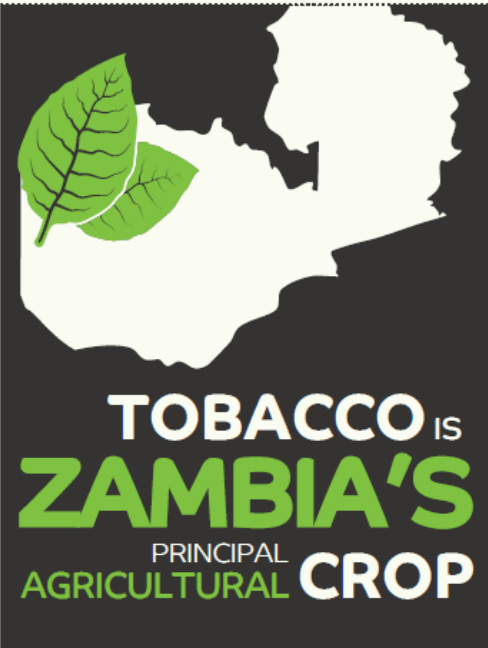



THE SOCIO-ECONOMIC FOOTPRINT OF TOBACCO PRODUCTION IN ZAMBIA


MORE THAN 20,000 TOBACCO GROWERS TAKE PART IN THE CROP EACH YEAR



TOBACCO IS ZAMBIA'S PRINCIPAL AGRICULTURAL CROP



TOBACCO GENERATES MORE THAN USD 110 MILLION IN EXPORT REVENUE



Source: Tobacco Association of Zambia TAZ; UN Comtrade; WTO



ITGA'S ROLE: SUPPORTING GROWERS OVERCOME CHALLENGES



INFORMATION AS A KEY COMPONENT OF ADVOCACY



tobacco asia 亚洲烟草

Volume 27 Number 3

Mexico's Premium Cigars
墨西哥高端雪茄

Refining Track and Trace
T&T系统升级

The New Prohibition Generational Bans
世代禁烟新趋势

NGP Trends
NGP趋势

ITGA Strategy on COP10
ITGA的COP10策略

www.tobaccoasia.com

14-16 September 2023
www.itga.com
Dortmund, Germany

ITGA's Strategy for COP10

The number of articles coming from the World Health Organization (WHO) Framework Convention on Tobacco Control (FCTC) has increased from 17 to 27, showing a clear trend for the international tobacco community to be more active in the process of the FCTC. It is a clear sign that the international tobacco community is becoming more active in the process of the FCTC. It is a clear sign that the international tobacco community is becoming more active in the process of the FCTC.

MAY 31ST WORLD UNDERSTANDING TOBACCO FARMING DAY

- Myth:** Tobacco Growing is bad for environment.
Fact: Tobacco growing is a sustainable and profitable crop that can be grown in a variety of climates and soil types. It is a renewable resource that can be grown in a sustainable and profitable way.
- Myth:** Tobacco is bad for growers' health.
Fact: Tobacco growing is a safe and healthy occupation. Growers can take steps to protect their health, such as wearing protective gear and avoiding smoking.
- Myth:** Tobacco growing exacerbates poverty.
Fact: Tobacco growing is a profitable and sustainable crop that can help improve the livelihoods of growers and their families.
- Myth:** Child Labour is a particular problem to tobacco growing.
Fact: Child labour is a global issue that affects many industries, not just tobacco. ITGA is committed to promoting child labour-free tobacco production.
- Myth:** Tobacco growing aggravates food security.
Fact: Tobacco growing is a profitable and sustainable crop that can help improve the livelihoods of growers and their families. It is not a food crop, but it can be grown in a way that does not compete with food production.
- Myth:** There are many economically sustainable alternatives to tobacco farming.
Fact: Tobacco growing is a profitable and sustainable crop that can help improve the livelihoods of growers and their families. It is a renewable resource that can be grown in a sustainable and profitable way.

ATLAS TOBACCO
GROWING IN FIGURES

DATA | LIVELIHOOD | TESTIMONIALS | GLOBAL

Tobacco Monitor
AN UPDATE ON THE MOST RECENT EVENTS AND FORECASTS

MAY 2023





UNITAB



International Tobacco Growers' Association

International Tobacco Growers' Association

TOBACCO courier

ENGLISH I
April 2022
#182

Women in Tobacco

Cover and Market Survey
Climate Change 2022
Women in Tobacco (A Larson We Need to Hear)
Women Tobacco Farmers
ITGA Members Country Reports

ITGA MEMBER: FOCUS ON WOMEN IN TOBACCO FARMING

Women Tobacco Growers in Zimbabwe

Message 08
President of the Zimbabwe Integrated Commercial Farmers Union (ZICFU), 16 years ago, I was part of the team that was instrumental in the founding of the ITGA.

ITGA: How long has tobacco been part of your life? When did it start being a part of your work? How has tobacco contributed to your life? Do you feel there are not as many opportunities in this sector?

Message 09
President of the Zimbabwe Integrated Commercial Farmers Union (ZICFU), 16 years ago, I was part of the team that was instrumental in the founding of the ITGA.

ITGA: Describe the range of activities you are taking part of at the moment. Can you please speak to through a typical day of work for you?

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Countryside Brazil

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ITGA: How are the main challenges that women in tobacco are facing in your market?

ITGA: What is the role of women in the decision-making processes in the tobacco sector in your country?

ITGA: How do you think the most significant barrier to growing tobacco in the tobacco sector is in your country?

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International Tobacco Growers' Association

TOBACCO courier

ENGLISH II
May 2022
#184

May 31st World Understanding Tobacco Farming Day

Listen to Farmers. ITGA Annual Survey outcome.

ITGA History in 2022
ITGA Market Survey 2022
2022 Crop Production Day
ITGA Members Country Reports

ITGA: Please discuss your views on the current state of the tobacco market, and any challenges you see in the sector.

ITGA: How do you see the role of women in the tobacco sector in your country?

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ITGA MARKET SURVEY

THE MAIN CHALLENGE IS THE HUGE INCREASE IN COSTS OF PRODUCTION, ESPECIALLY THE PRICE OF FERTILISERS IN ZAMBIA

SUBSTANTIAL PORTION OF THE CROP WAS DAMAGED BY HEAVY RAINS IN INDIA

YOUNG FARMERS DON'T WANT TO CONTINUE TOBACCO CULTIVATION

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Argentina Country Report

Original work produced in Spanish

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