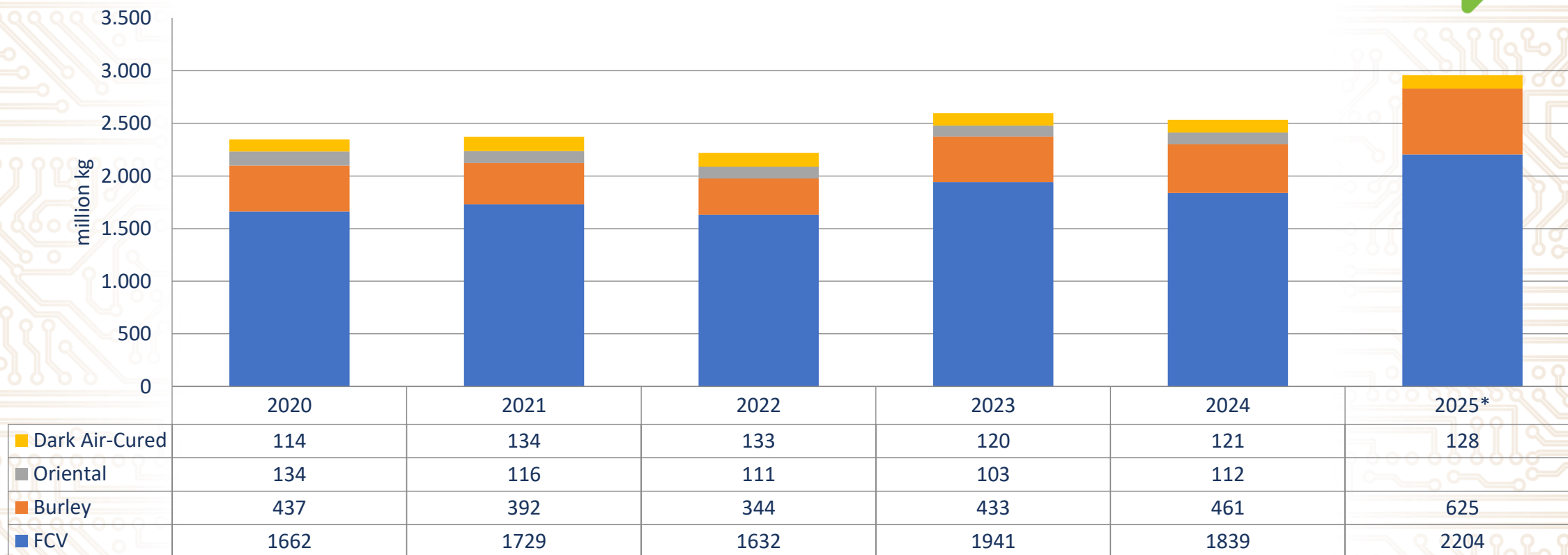


Global Tobacco Market Dynamics: Understanding the Current Production Context



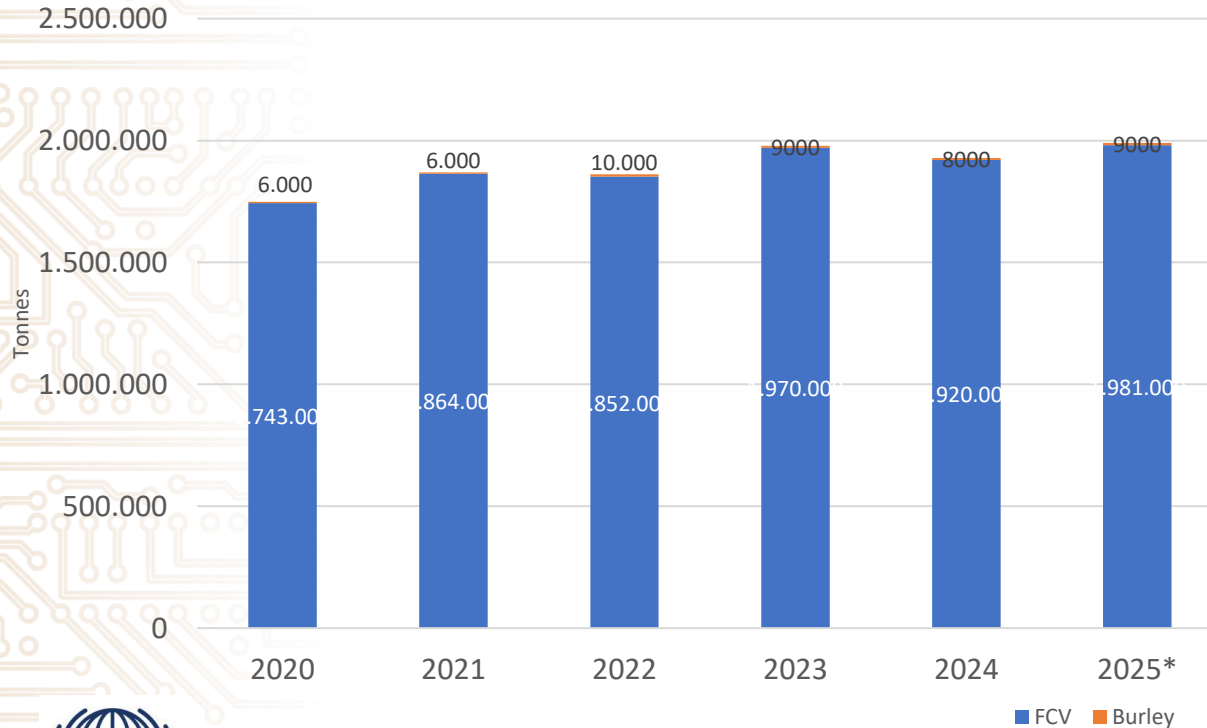
Mercedes Vázquez
ITGA CEO

Global Production* (excluding China)



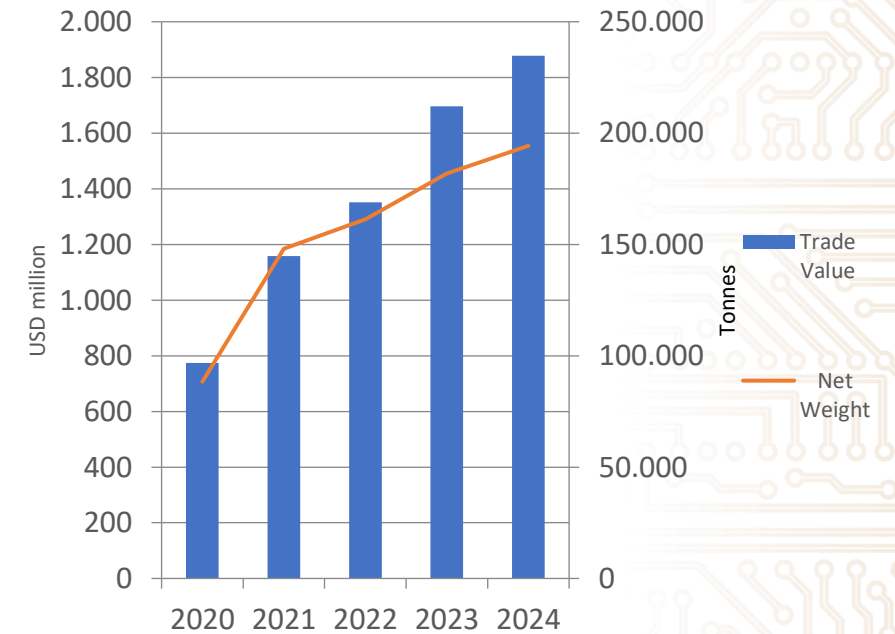
China in Numbers

Tobacco Production



Source: Universal Leaf Global Estimates

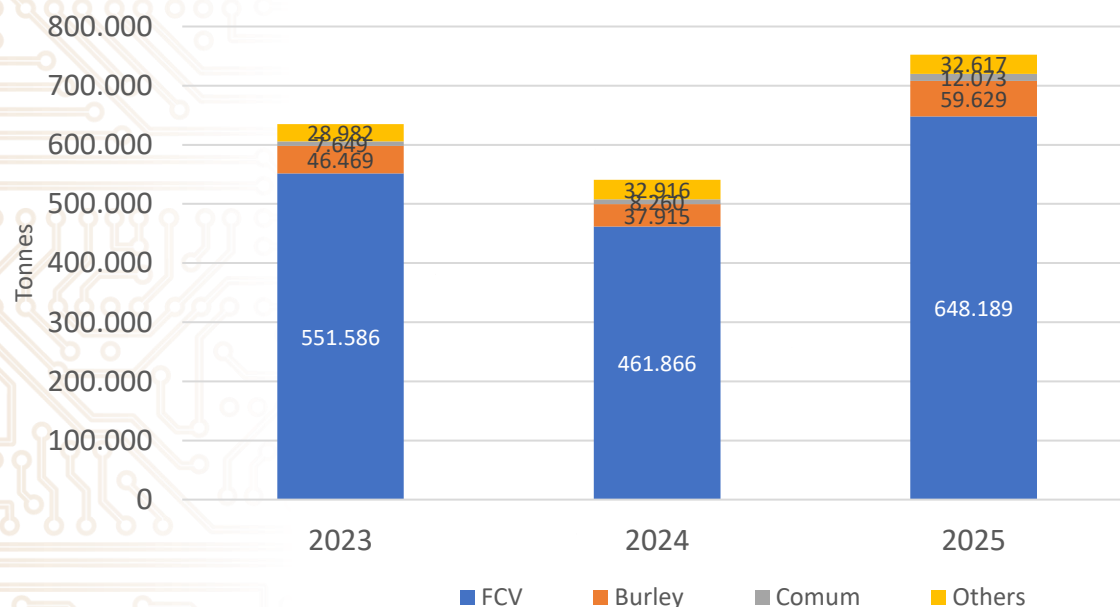
Tobacco Import Statistics



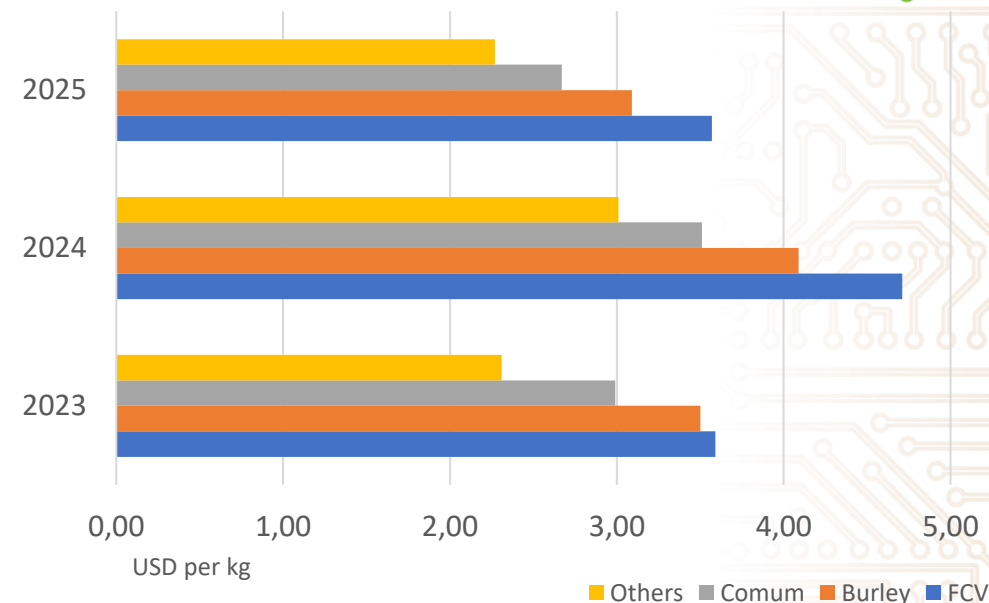
*Projected values (29 May 2025)

Brazil in Numbers

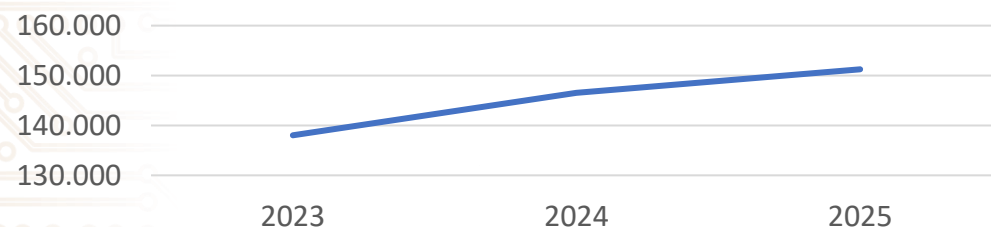
Tobacco Production



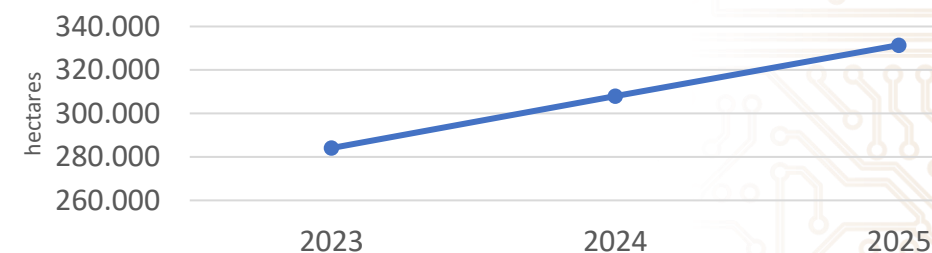
Pricing



Number of Growers



Planted Area



USA in

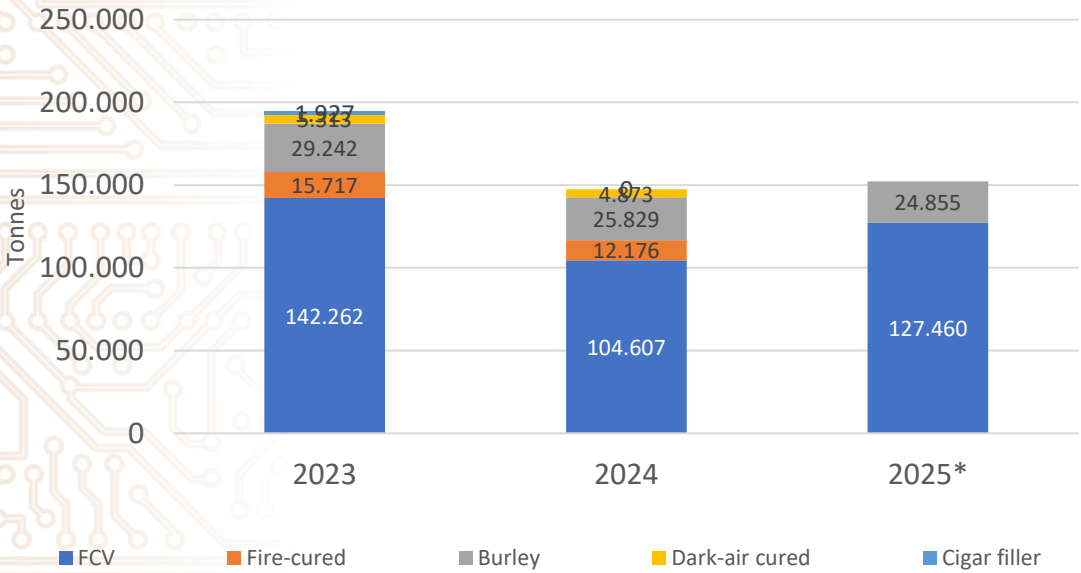
Numbers



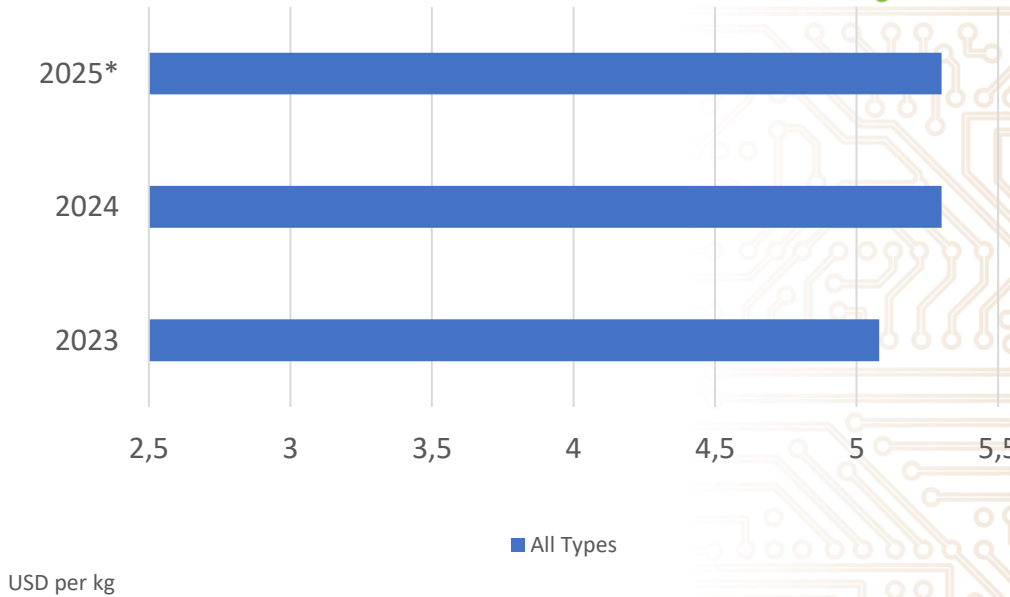
United States
Department of
Agriculture



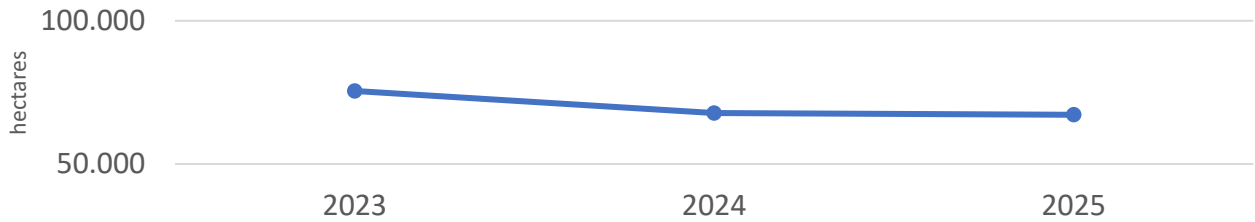
Tobacco Production



Pricing



Area Harvested

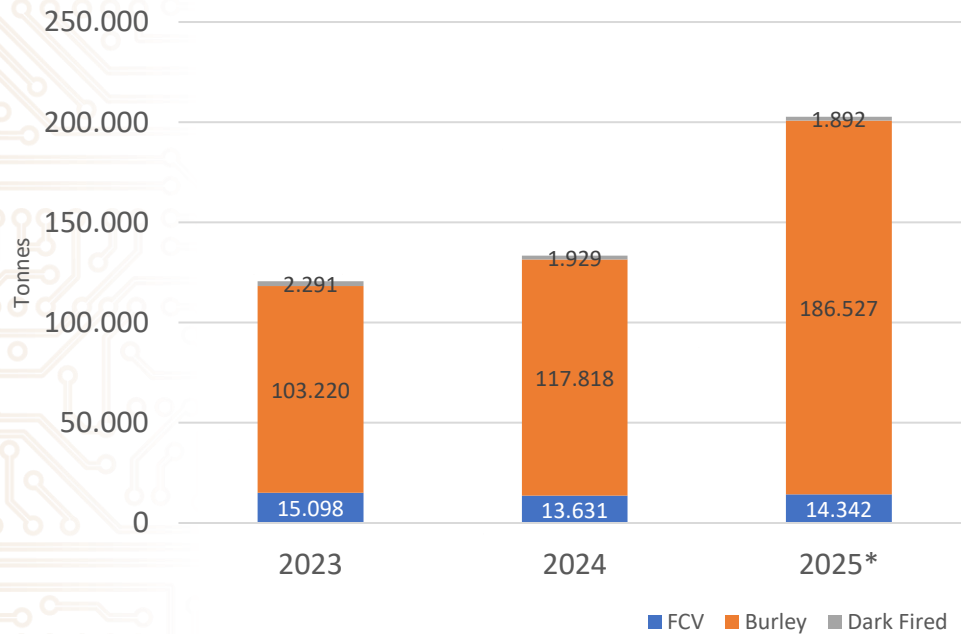


*Preliminary figures

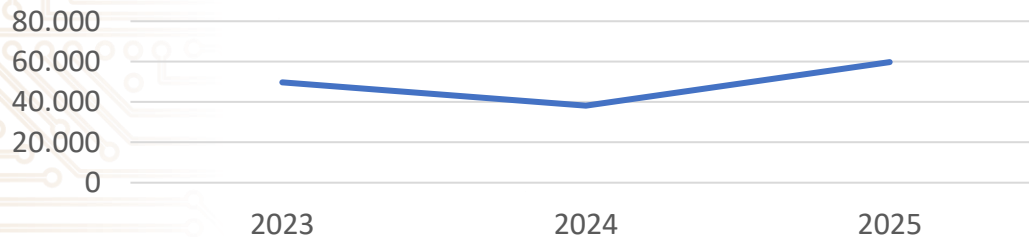
Malawi in Numbers



Tobacco Production

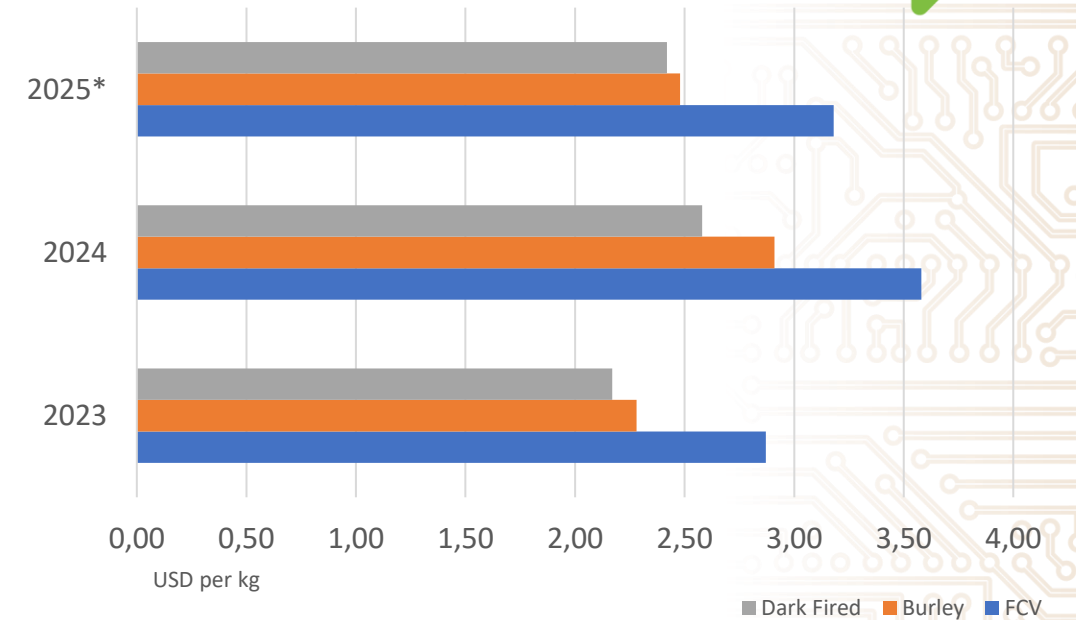


Number of Growers

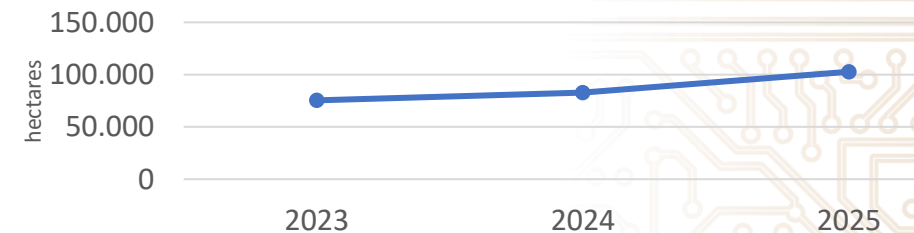


*Preliminary figures

Pricing



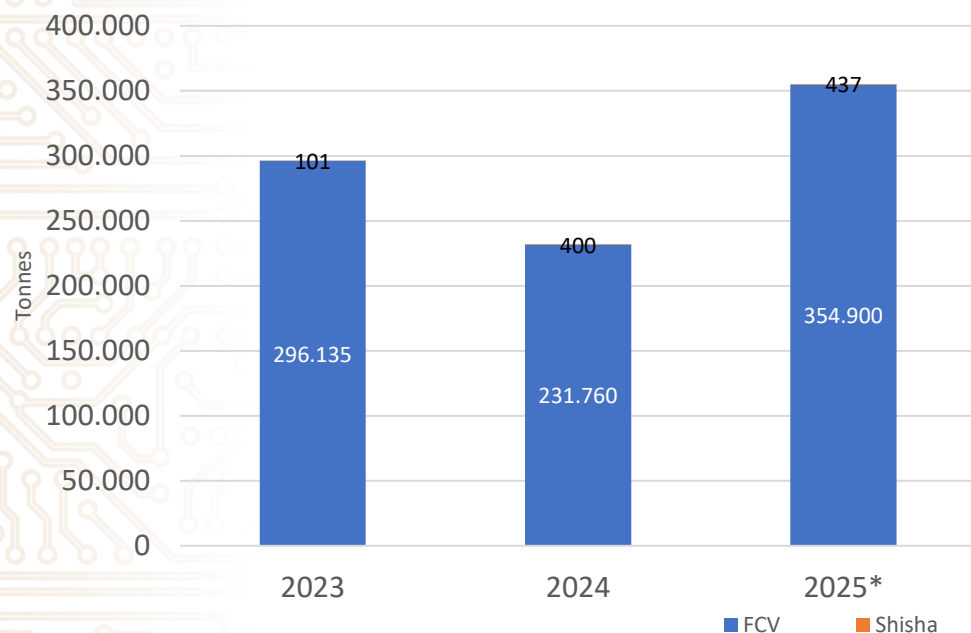
Planted Area



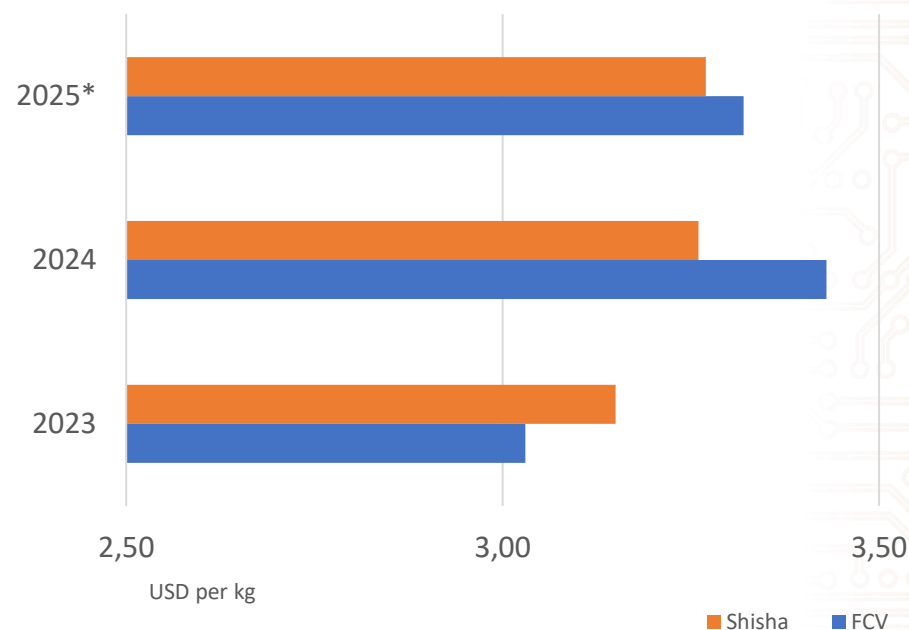
Zimbabwe in Numbers



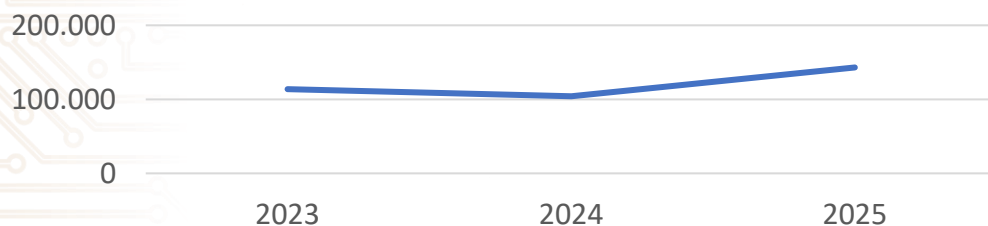
Tobacco Production



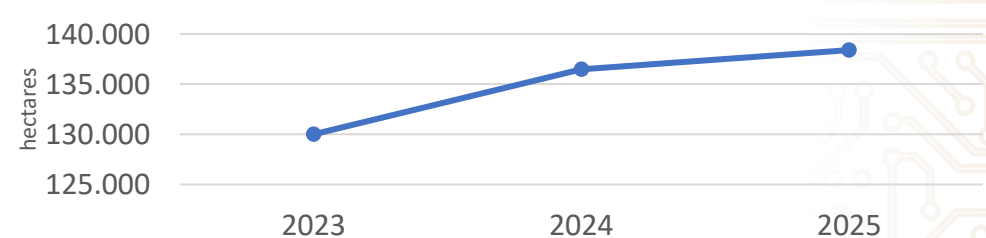
Pricing



Number of Growers



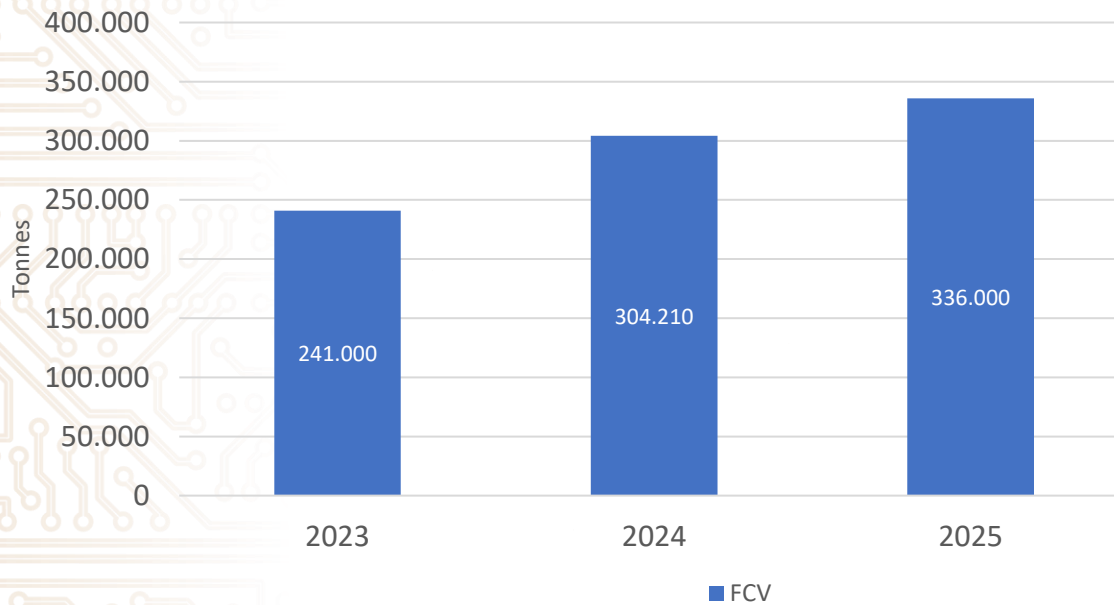
Planted Area



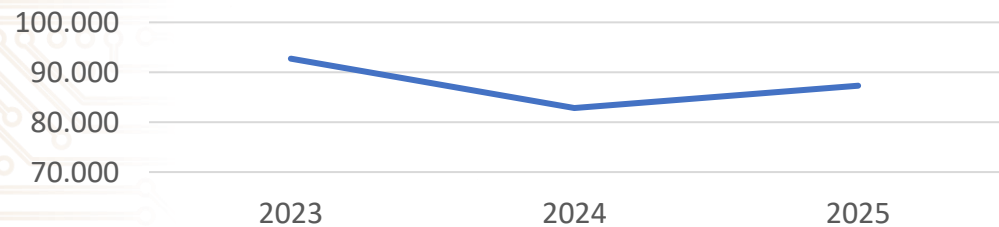
India* in Numbers



Tobacco Production

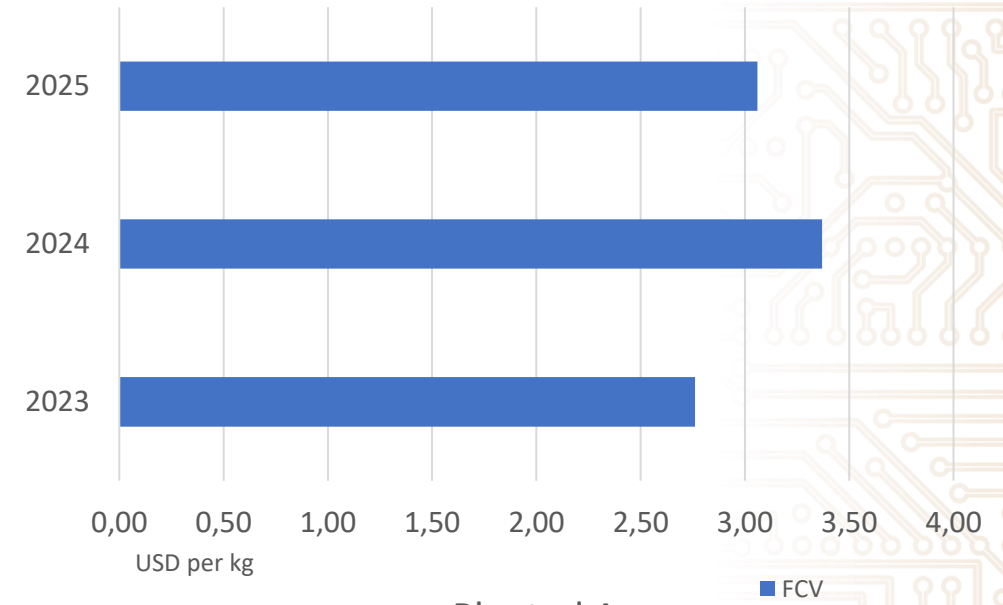


Number of Growers

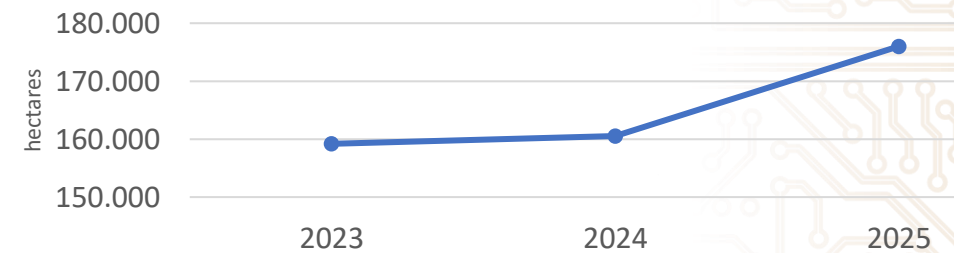


*FCV Production only/2025 season is ongoing

Pricing



Planted Area



General Observations

Climate Variability as a Key Risk Factor

- Unpredictable rainfall, drought, and temperature extremes are reshaping yields and quality across all regions.
- Climate adaptation (irrigation, new practices, sustainable farming) is essential everywhere.

Oversupply Pressures Emerging

- Key Markets reported production above demand, raising concerns about future price stability.
- Balancing supply with global demand is a top priority to avoid grower dissatisfaction.

Profitability Under Pressure

- Even with record or strong yields (e.g., Zimbabwe), high costs and weaker prices are eroding farmer returns.
- Many growers fear income volatility if input costs and tariffs continue rising.

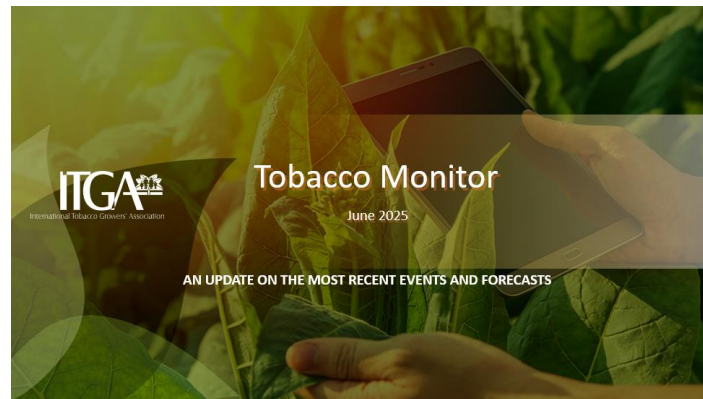
Sustainability & Governance Gaining Momentum

- Increasing emphasis on good agricultural practices, compliance with international standards, and collaborative governance.
- Seen as critical for long-term market access and competitiveness.

ITGA Annual Meeting at InterTabac 2025

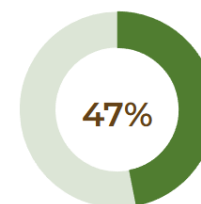


ITGA Focus on Information and Data

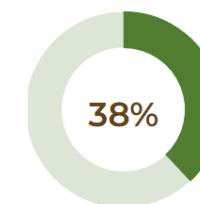


Sustainable Tobacco Growing

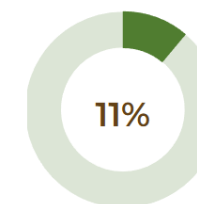
Percent of farmers that have sustainable wood for curing tobacco



Percent of farmers that have access to a reliable source of water

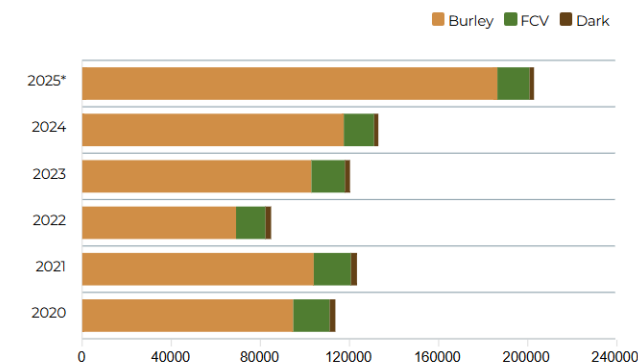


Percent of farmers that have access to a reliable source of electricity



Tobacco Production

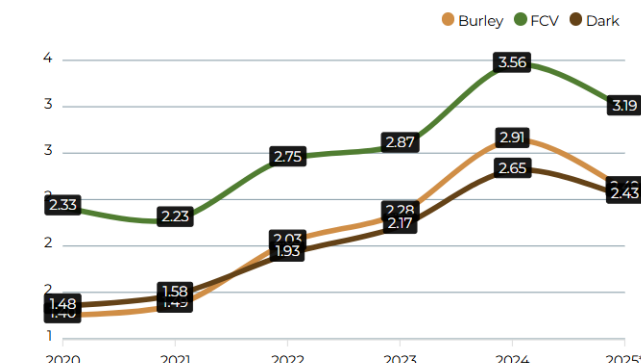
in thousand tons



*The values for 2025 are projected

Pricing

in USD/kg



*The values for 2025 are preliminary



**PARTNERS IN EXCELLENCE
TOBACCO IS OUR BUSINESS**

**THE FUTURE
OF TOBACCO
STARTS HERE**



ITGA
International Tobacco Growers' Association



**38th UNITAB EUROPE
CONGRESS**

*European tobacco outlook
regulatory challenges and market opportunities*

Naples | September 23-24, 2025

Thank You!

 [itga-tobaccoleaf](https://www.linkedin.com/company/itga-tobaccoleaf)

 [@TobaccoGrowers](https://twitter.com/TobaccoGrowers)

 [ITGA org](https://www.youtube.com/ITGAorg)

 itga@tobaccoleaf.org