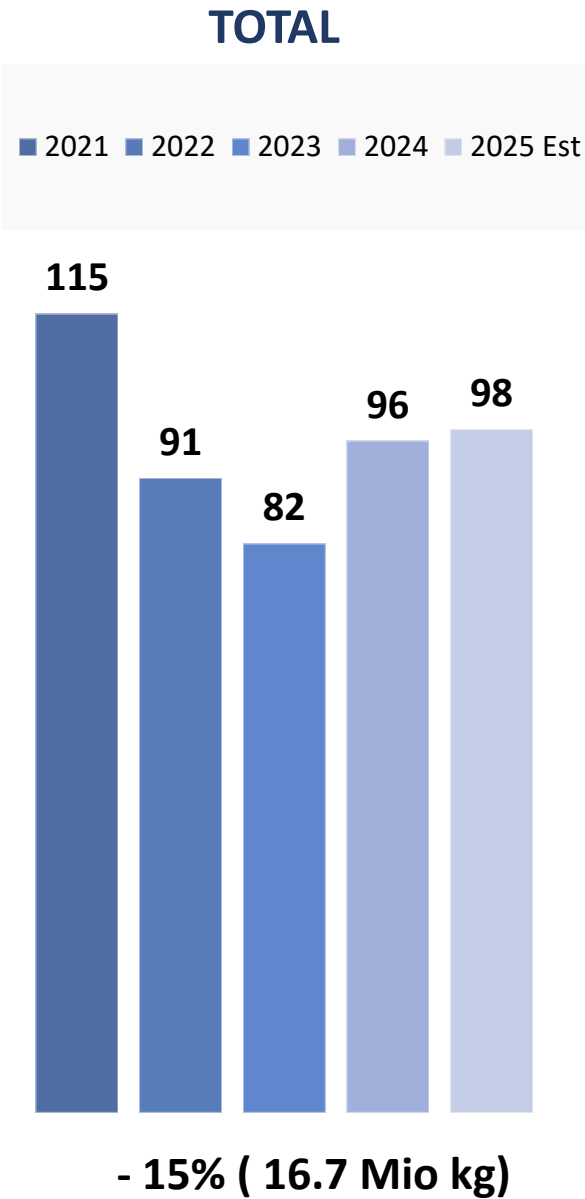
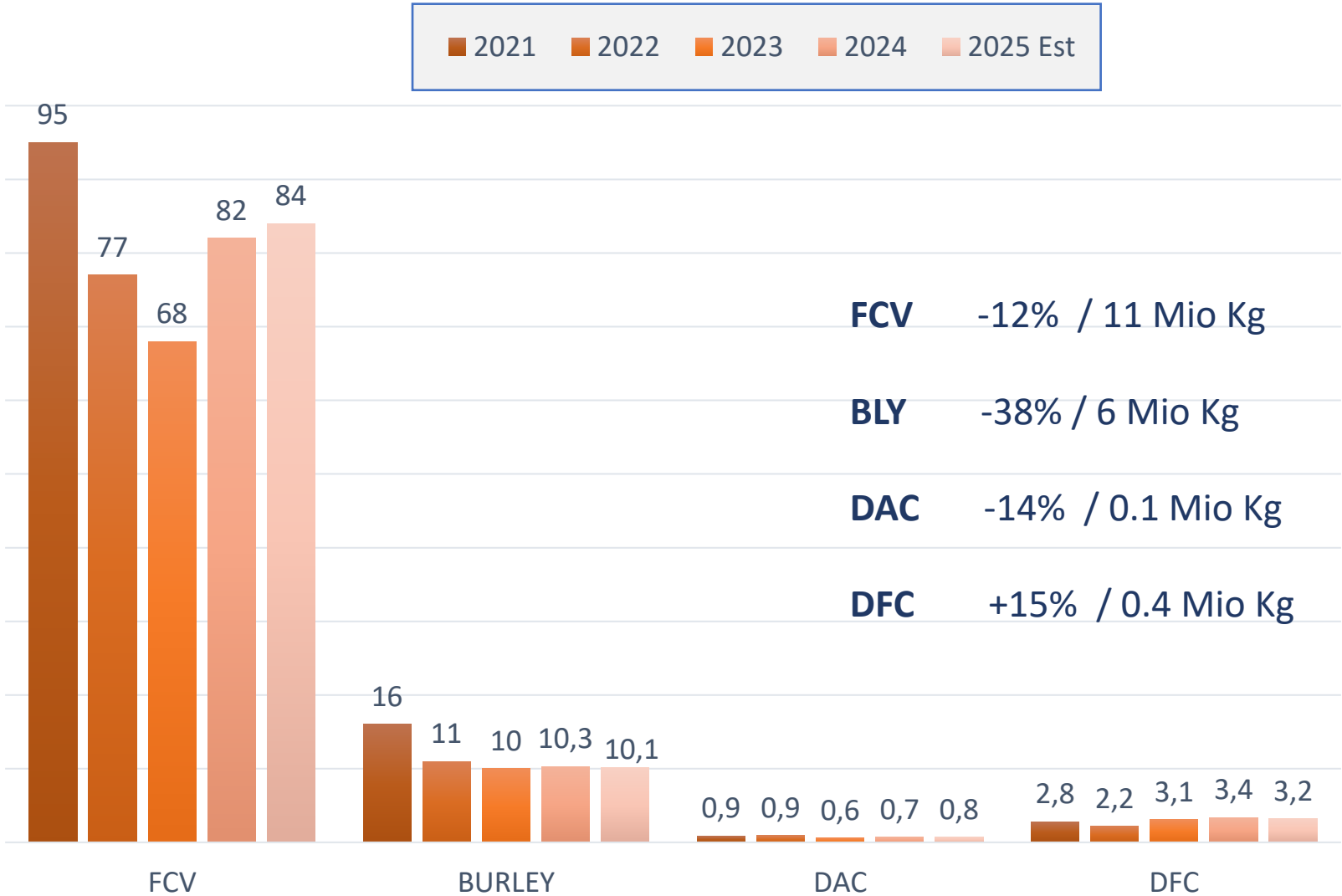


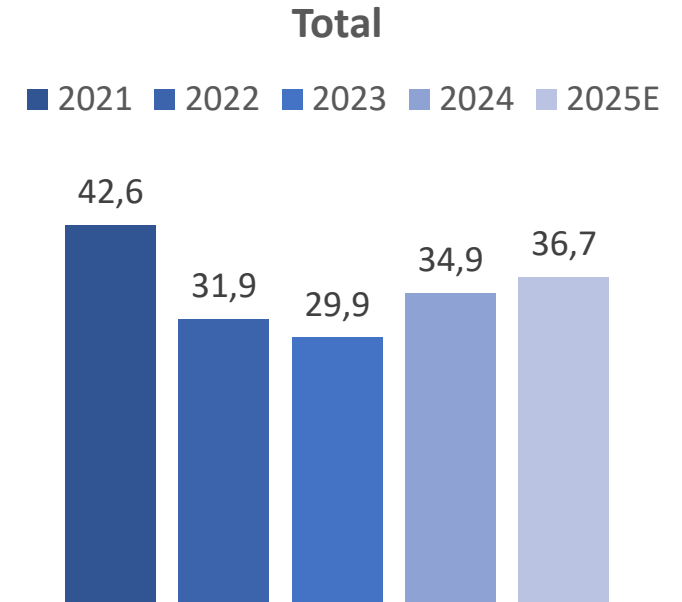
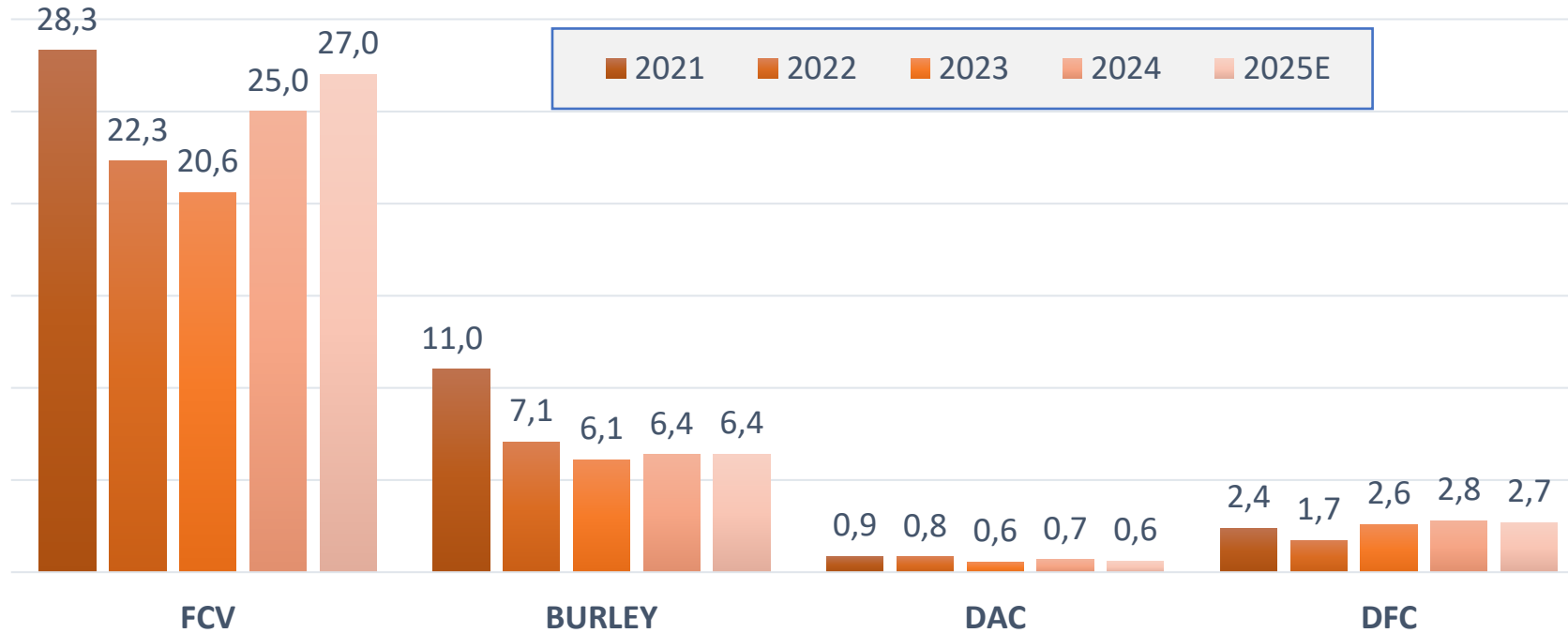


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The European Raw Tobacco Market: Challenges & Future Perspectives

38th UNITAB EUROPE Congress
Naples, September 23-24, 2025





Overview

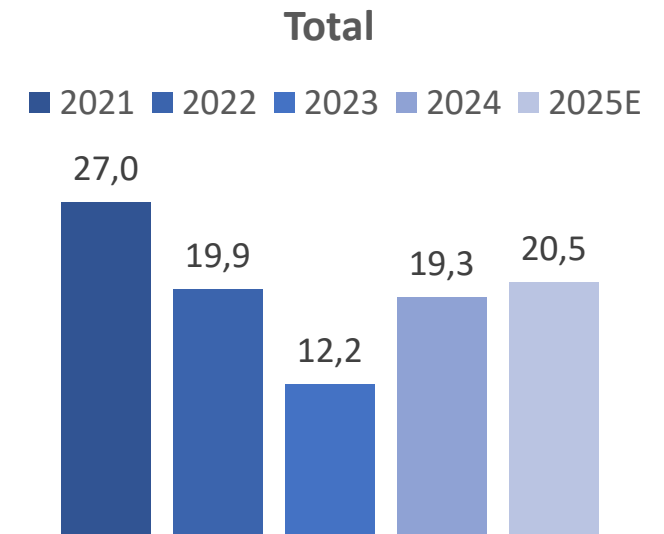
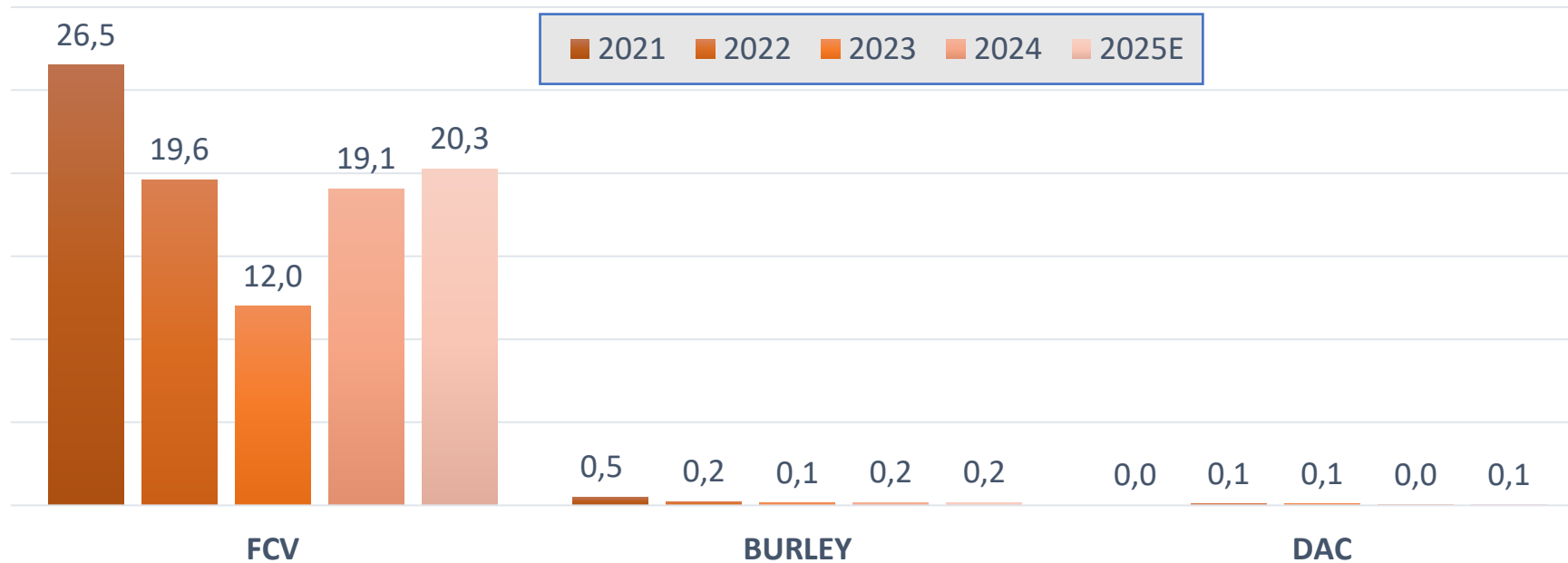
- Crop 2025 FCV production area increase by 4% (approx 300ha); after several years of reduction, Burley remains same as 2024
- Demand stable thanks to the multinationals' support

Challenges:

- Labor Shortage
- Create conditions to attract New Generation Farmers
- Supply Chain Organization (efficiency & sustainability)
- Customs Controls
- Global supply increase

Future Perspectives:

- Relationship with multinationals to find common ground
- Sustainability: ESG added value to EU Chain



Overview

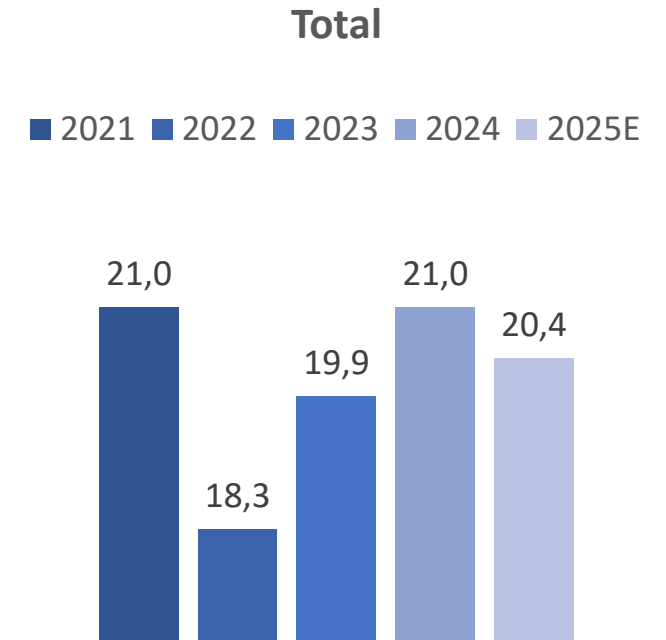
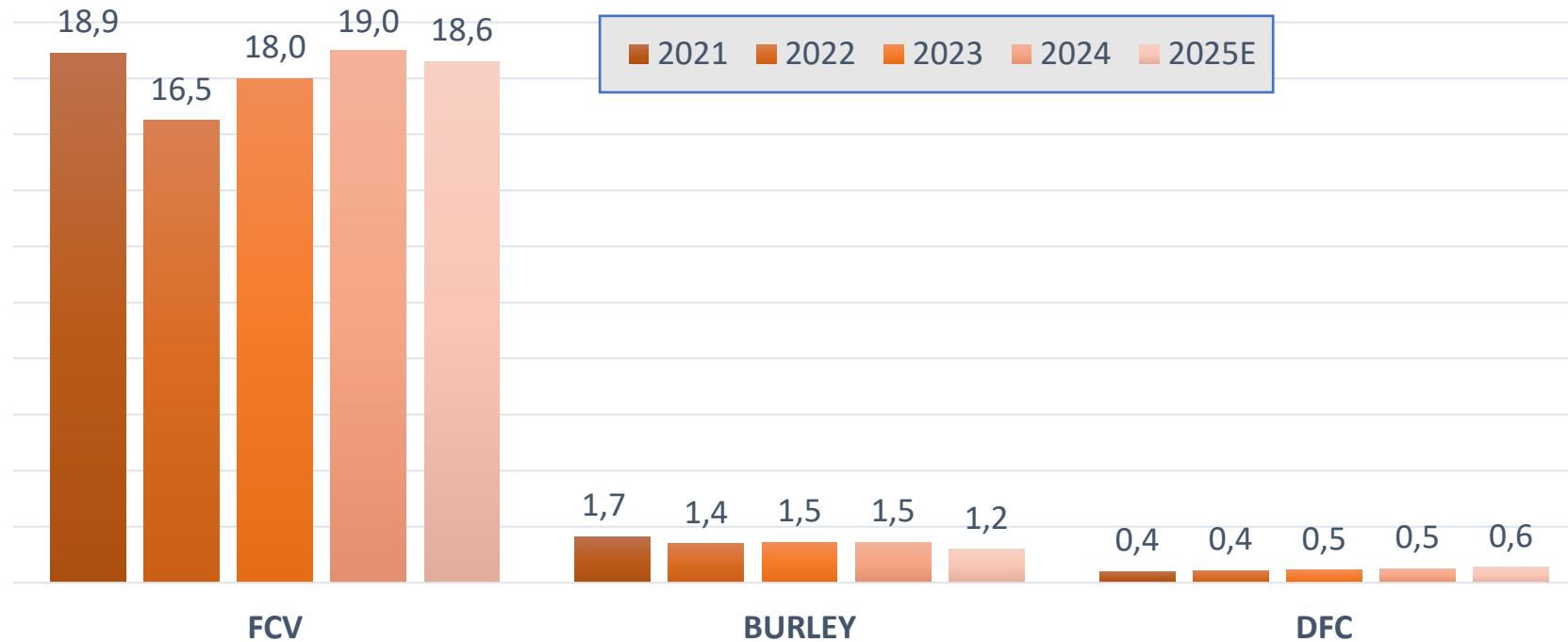
- Crop 2025 FCV production area increase (approx 300ha)
- Demand stable thanks to the multinationals' support

Challenges:

- Skilled Labor
- Create conditions to attract New Generation Farmers
- Supply Chain Organization
- Government approach against tobacco
- Global supply impact

Future Perspectives:

- Relationship with multinationals to find common ground
- Sustainability: ESG added value to EU Chain



Overview

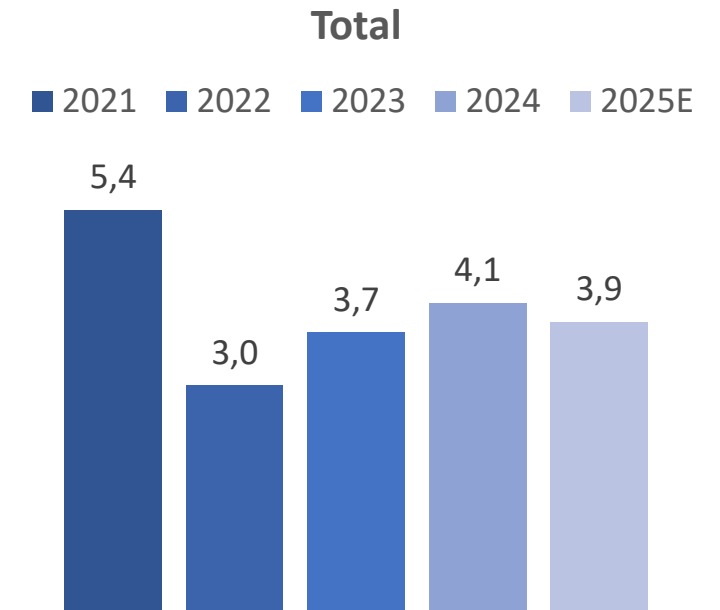
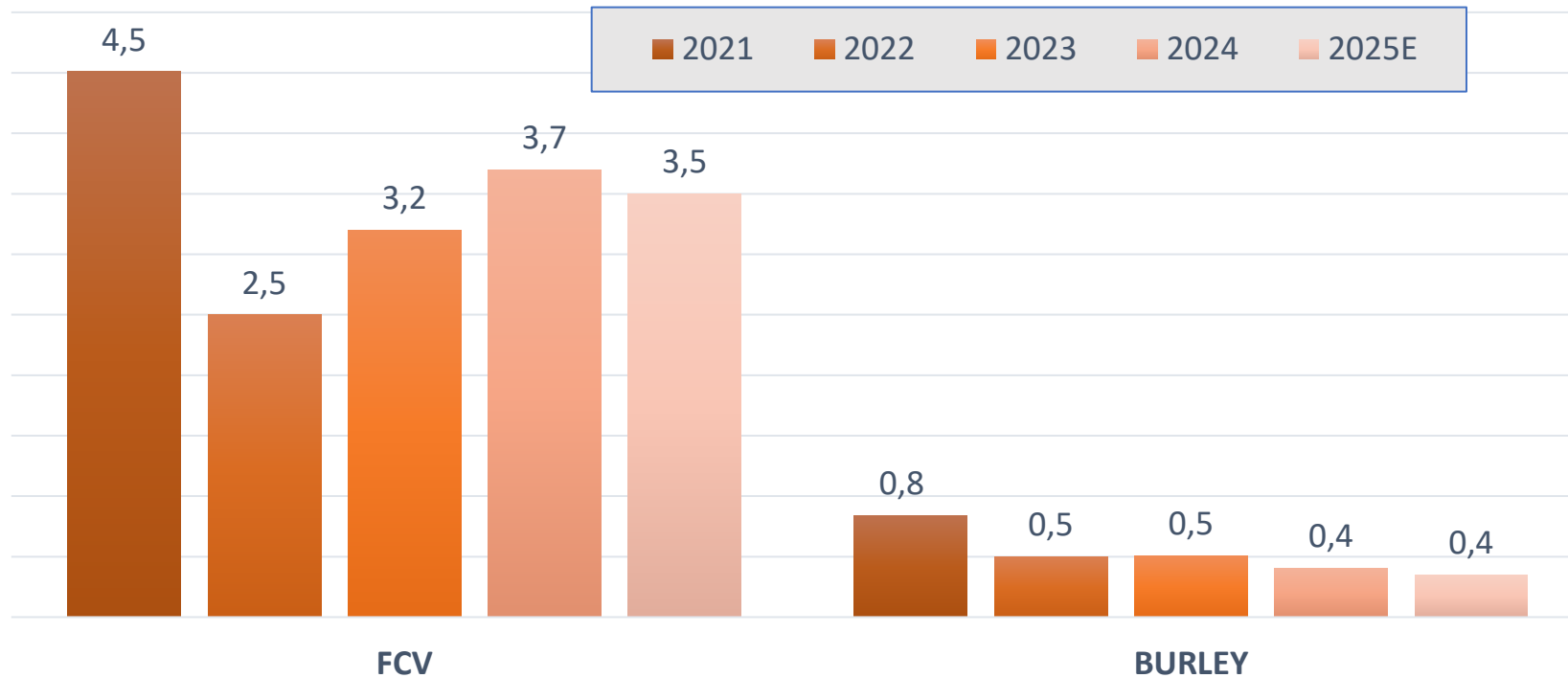
- Demand of Shisha and Multinationals' support
- Largest manufacturer

Challenges:

- Impact of War
- Supply Chain and competitors' approach

Future Perspectives:

- Relationship with multinationals to find common ground
- Sustainability: ESG added value to EU Chain



Overview

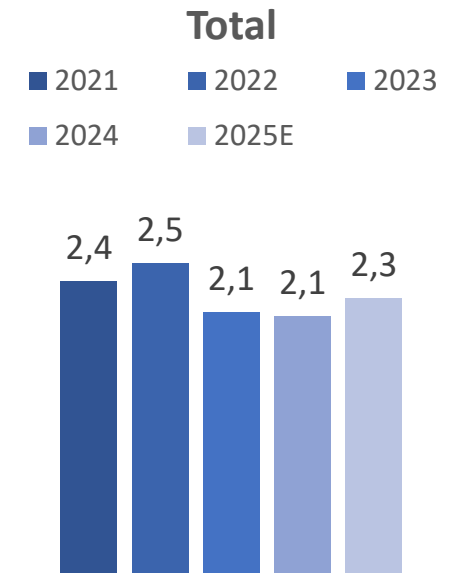
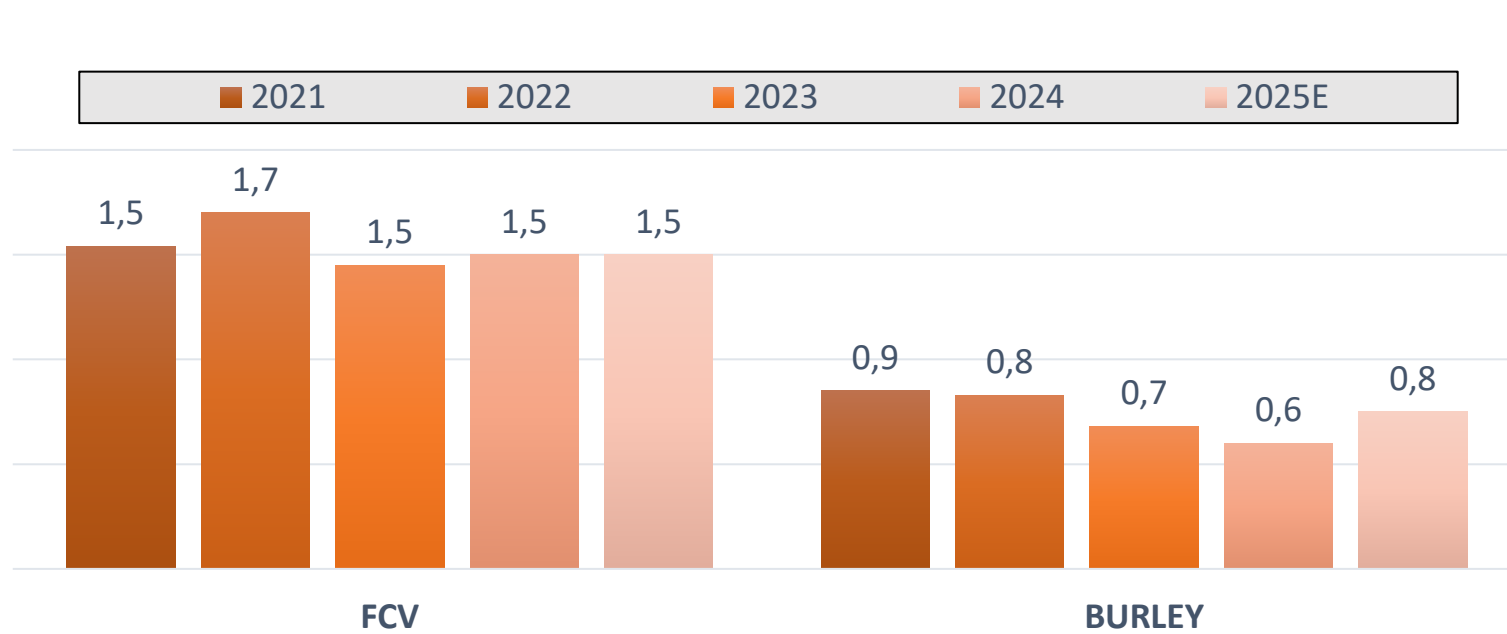
- Two competitors in the market
- Risk of oversupply

Challenges:

- Low competitiveness in the global market
- Farmers' efficiency to improve

Future Perspectives:

- Relationship with multinationals to find common ground



Overview

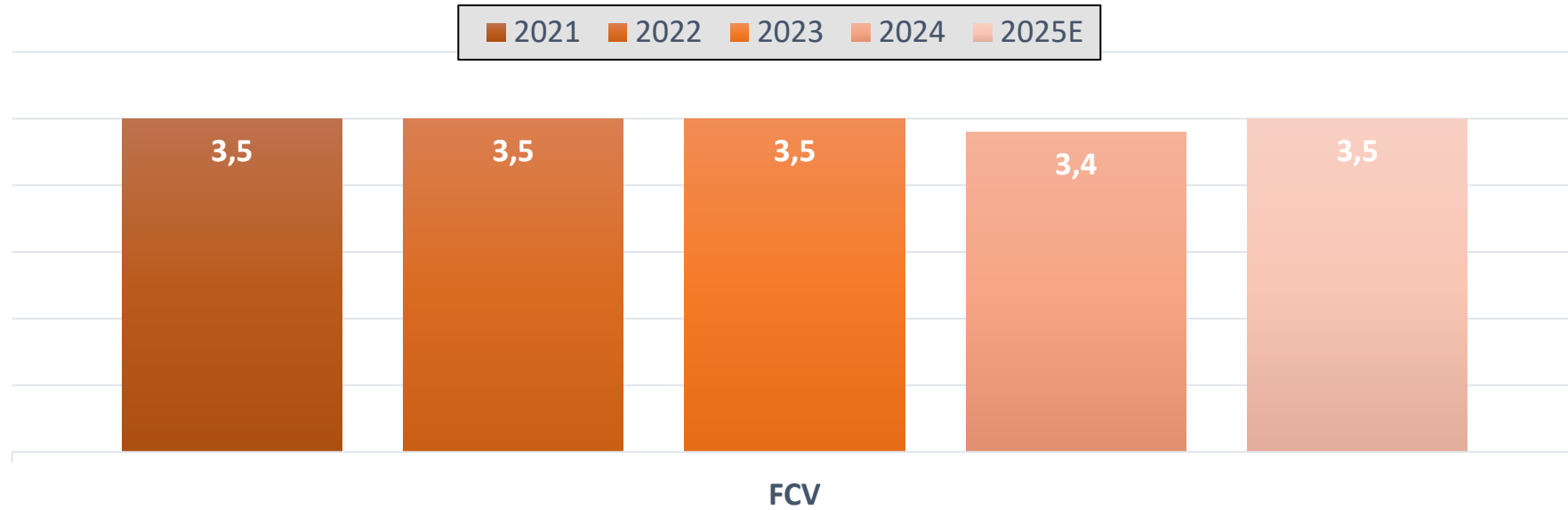
- Small production - High FCV and Burley quality

Challenges:

- Create conditions to attract New Generation Farmers
- Government approach against tobacco

Future Perspectives:

- Relationship with multinationals to find common ground



Overview

- High quality for shisha market

Challenges:

- Create conditions to sustain production

Future Perspectives:

- Relationship with multinationals to find common ground

- EU Tobaccos loss of competitiveness due to Global Production Increase
- Multinational Governmental agreements
- Impact of EU Tobacco Regulations
- Costs of Production
- Labor Shortage
- Sustainability: ESG added value to EU Chain
- Create conditions to attract New Generation Farmers



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Thank you

