

THE FUTURE
OF TOBACCO
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ITGA
International Tobacco Growers' Association

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 “

The Honourable Dr. Anxious J. Masuka, Minister of Agriculture, Mechanisation and Water Resources Development of Zimbabwe

Harare, Zimbabwe – 1 July 2026

Representatives of grower associations from India, Malawi, Tanzania, Zambia and Zimbabwe, government officials, researchers, and international organisations gathered in Harare, Zimbabwe, for the Open Day Conference of the International Tobacco Growers' Association (ITGA) 2026 Africa Regional Meeting.

Hosted by the Zimbabwe Tobacco Association (ZTA), the meeting has become the leading annual event for Africa's tobacco sector, bringing together the entire supply chain to address the opportunities and challenges shaping the future of tobacco growing. This year's discussions focused on maintaining the sector's competitiveness and profitability amid changing market conditions, evolving regulatory expectations and increasing sustainability requirements.

The Conference was officially opened by **the Honourable Dr. Anxious J. Masuka**, Minister of Agriculture, Mechanisation and Water Resources Development of Zimbabwe. In his remarks, the Minister recognised ITGA's role as the main platform to discuss the future of tobacco growing in Africa. He also emphasised the growing importance of producing a fully traceable and sustainable crop while outlining government initiatives to strengthen the sector, including the establishment of a Tobacco Stabilisation Fund.

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In his opening remarks, ITGA President **José Javier Aranda** recognised Zimbabwe's leadership within the global tobacco community and paid tribute to the ZTA and its President, **Graham Ross**, for their outstanding leadership in hosting the meeting and for their longstanding contribution to both ITGA and the African tobacco sector. He also thanked the wider African region for its decisive role in strengthening the Association and promoting the interests of growers internationally. Looking ahead, Aranda identified ensuring a living income for tobacco growers as one of the defining challenges facing the industry, stressing that growers continue to assume considerable risks and make the investments upon which the entire supply chain depends.

“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.”

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The Conference Keynote Speaker Block opened with an academic perspective from Professor Eric Mungatana of Stellenbosch University, who reviewed the latest evidence on contract farming and smallholder livelihoods across Africa. His presentation highlighted how producer associations are the critical bridge between supply and demand, with significant potential to reduce inequality within contract farming systems.

Another of the Conference's highlights was the presentation of a new Living Income Survey conducted among Zimbabwean tobacco-growing households through the collaboration of the ZTA, ITGA and the ECLT Foundation (transitioning to ECLA). The research confirmed tobacco as the principal source of income for more than nine out of ten surveyed households, underlining the crop's central role in rural livelihoods. At the same time, the findings revealed that 86.3% of respondents considered their total household income to be below what is required for a decent standard of living, reinforcing the importance of improving grower profitability as the foundation of sustainable rural development.

Providing a global market outlook, ITGA Manager Tobacco Industry Analysis Ivan Genov presented the latest developments in international leaf production and pricing trends. He explained that the global tobacco leaf market has shifted from the tight supply conditions of recent years into an oversupply position, while geopolitical developments are creating additional pressure on production costs. To illustrate this shift, Genov noted that global flue-cured Virginia production (excluding China) increased by 45% between 2022 and 2025, while burley production rose by more than 105% over the same period.

Erwin Henriquez, Head of Nicotine Research at Euromonitor International, complemented the market analysis by presenting the latest outlook for global nicotine consumption. According to Henriquez, the Middle East and Africa Region remains the last bastion of combustion while the international illicit market thrives in the shadow of a complex global regulatory landscape and rising affordability pressures.

Regulatory developments remained another central theme throughout the Conference. Moderated by ITGA Chief Executive Officer Mercedes Vázquez, a panel featuring Michiel Reerink, International Corporate Affairs Director & Managing Director at Alliance One International, and Stephen Nyabadza, Africa Region Head of External Affairs at Universal Leaf, reviewed the outcomes of the Eleventh Conference of the Parties (COP11) to the WHO Framework Convention on Tobacco Control, preparations for COP12, and the implications of the European Union's Corporate Sustainability Due Diligence Directive for African tobacco-producing countries. Discussions focused on maintaining market access while ensuring that increasing compliance requirements remain practical for smallholder growers.

The Conference also featured an interactive Environmental, Social and Governance (ESG) panel bringing together Matthew Wilde, Head of Group Sustainability at Contraf-Nicotine Tobacco, Mark Ballance, Senior Director – Global Sustainability at Pyxus International, and Rob Holmes, Executive Officer of the Tobacco Leaf Exporters Association of Zimbabwe. Companies shared practical experiences on environmental stewardship, traceability, living

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income and child labour prevention, while identifying deforestation, soil preservation and changing customer expectations as key challenges. Panellists also highlighted significant progress in traceability systems and due diligence practices across African tobacco supply chains.

The ITGA 2026 Africa Regional Meeting was preceded by a Living Income Workshop in Takawira Village, bringing together more than 100 tobacco growers for an open exchange on the realities of farming and the practical actions needed to strengthen rural livelihoods. Together, the Workshop and the Open Day Conference reinforced ITGA's commitment to ensuring that growers remain at the centre of the conversation on the future of the tobacco sector.

Editor's note: Follow our designated Events webpage: <https://www.itgaevents.com> and Social Media handles @TobaccoGrowers on X and itga-tobaccoleaf on LinkedIn for more details about the event

Get in touch: itga@tobaccoleaf.org