

International Tobacco Growers' Association

# TOBACCO

courier

ITGA 

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ITGA  40  
International Tobacco Growers' Association

40 years of Growers' Strength

## FROM IMPACTFUL LEGACY TO EXCITING FUTURE

ITGA 40<sup>th</sup>  
Anniversary

ITGA  
Milestones

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Meeting

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Spotlight Interviews

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Ivan Genov  
ITGA Manager Tobacco  
Industry Analysis

Latest Crop Data  
ITGA Member Associations



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Connecting Farmers to Global Markets



Universal Corporation is a global business-to-business agriproducts company with over 100 years of experience supplying products and innovative solutions to meet our customers' evolving needs. With operations in over 30 countries on five continents, we are uniquely positioned to leverage our worldwide network to access a diverse, reliable supply of plant-based materials. This presence, combined with our supply chain expertise, integrated processing capabilities, and commitment to sustainability, enables us to deliver high-quality, customizable, and traceable value-added agriproducts essential to our customers' success.

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ITGA FOUNDATION 1984

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ITGA Address: Av. 1º de Maio - 99, 1º Dtoº 6000-086 Castelo Branco - Portugal  
Contact: Tel.: 00 351 272 092 583  
Mail: [itga@tobaccoleaf.org](mailto:itga@tobaccoleaf.org) | Website: [www.tobaccoleaf.org](http://www.tobaccoleaf.org)



# ITGA MEMBERS

PARTICIPATING IN THIS ISSUE





# ITGA 40<sup>th</sup> Anniversary Celebrations

ITGA President  
José Aranda, Argentina



(Afubra, Brazil)



(COPROTAB, Argentina)



(NAT 2010, Bulgaria)



(ZTA, Zimbabwe)



(TAMA, Malawi)





**Javare Gowda,  
(Farmer Leader, India)**



**(ARET, Malawi)**



**Dr. Albert Changaya  
Chief Executive Officer**

**(Intabaco,  
Dominican Republic)**



**(TAZ, Zambia)**

**Tobacco Association of Zambia  
celebrates 40 years of  
International Tobacco growers  
Association's work**



ITGA has been a strong supporter of TAZ with now over four decades of unwavering support and being a strong international ally



**The Tobacco Institute of India**  
Regd. Office: 316-318, 3<sup>rd</sup> Floor, Block - E  
International Trade Tower, Nehru Place, New Delhi - 110 019  
Phone: +91 11 26231214 / 5 / 6 | Fax: +91 11 26469482  
E-mail: iti@itonline.org | Website: www.itonline.org  
CIN: U16003DL1992NPL085954

New Delhi  
20<sup>th</sup> November, 2024

**Message on 40<sup>th</sup> Anniversary of ITGA**

We at The Tobacco Institute of India (ITI) extend our best wishes and congratulations to ITGA on its 40<sup>th</sup> Anniversary!

As a long-time partner, working together on numerous occasions, we celebrate ITGA's steadfast dedication to raising the concerns of tobacco growers at a global level, especially in the face of an increasingly challenging regulatory environment and unfounded allegations of the anti-tobacco lobby.

Over the years, ITGA has effectively positioned itself as the unified voice of tobacco growers worldwide, countering misinformation related to tobacco growing and advocating evidence-based policies. ITGA has been constantly highlighting the livelihood dependence on tobacco crop in many countries across the world and requesting the Governments to ensure tobacco growers livelihood is protected.

ITGA has been highlighting the importance of inclusive and participatory policy-making with the inclusion of growers & other key stakeholders throughout the process of policy-formulation.

ITGA's dedication and commitment to advocating for the rights and livelihoods of tobacco growers across the globe is truly encouraging.

We wish ITGA continued success in its future endeavours and look forward to many more future collaborations towards ensuring better future for the tobacco growing community.

Here's to many more years of impactful work and success!

**(ITI, India)**

**Affiliations**

- International Tobacco Growers' Association (ITGA) • Tobacco Merchants' Association, USA (TMA)
- CI • FICCI • ASSOCHAM • PHDCCI • ICGI • ASCI • Chambers of Commerce, Andhra, Maharashtra, Bombay
- The Federation of Telangana and Andhra Pradesh Chambers of Commerce and Industry
- Federation of Karnataka Chambers of Commerce and Industry

**Message of Congratulations**

**To:** ITGA Secretariat  
**From:** Jang Sung-woo, President of KTGO  
**Subject:** Congratulations on ITGA's 40th Anniversary  
[I apologize for the delay in delivering the KTGO message.]

Dear ITGA,

I extend my heartfelt congratulations to ITGA on its 40th anniversary!

Over the past four decades, ITGA has been a powerful advocate for tobacco growers worldwide, addressing their concerns on the international stage and ensuring that their efforts are justly recognized and respected.

These initiatives have gone beyond the tobacco industry, contributing to the sustainable development of agricultural communities and the protection of farmers' rights, embodying a broader and more profound mission.

Through unity and dedication, ITGA has played a vital role in overcoming the challenges faced by tobacco growers. Its efforts have significantly enhanced the quality of life for growers and amplified their voices in global discussions.

As a global association, I look forward to ITGA continuing its mission to advance the rights of tobacco growers and create a sustainable and respectful agricultural environment.

On this important milestone, I wish ITGA a bright future and continued success in all its endeavors.

Sincerely,  
**Jang Sung-woo**  
President of KTGO

**(KTGO, South Korea)**

**ITGA - ZICFU Input**

Tobacco production in Zimbabwe is the largest foreign currency earner and contributes about 12 % of the National GDP. Zimbabwe produced 265 million kilograms in 2023-2024 season from the previous record breaking total of 297 million kilograms. Most Zimbabwean farmers, regardless of the land size are producing the best quality compared to any other tobacco producing countries in the world. Zimbabwe heavily relies on tobacco production and tobacco industry which employs a significant number of people. Most families in the farms rely on tobacco production as an export crop and source of income.

ZICFU and other tobacco producers are facing economic, social and environmental challenges in the tobacco industry ie Price distortion, Climate change, High cost of production, Shortage of electricity. The farmers, ITGA together with governments and the population at large is engaged in the tree planting programs to mitigate on sustainable production of tobacco in the world, with ITGA providing the tobacco industry's voice.

It is of paramount importance to engage on more mitigatory measures to ensure tobacco production continuity through an international organization where ITGA plays an important role to lobby and advocate for sustainable continuity of the tobacco fraternity in the world.

**HAPPY ITGA 40th ANNIVERSARY**

**(ZICFU, Zimbabwe)**

**Cámara del Tabaco  
de Salta**

**ITGA 40**  
International Tobacco Growers' Association

*Participamos de la alegría de los  
40 años de vigencia de nuestra  
defensa mancomunada de la  
producción tabacalera en el  
mundo y nos llena de satisfacción  
contarnos entre los fundadores.*

*Lo que fue un sueño, hoy es una  
sólida realidad que hoy preside  
por segundo mandato nuestro  
comprovinciano Javier Aranda.*

**(Cámara del Tabaco  
de Salta, Argentina)**





**ecit foundation**

**We catalyse the power of States, businesses and communities in collective action to eliminate all forms of child labour in agriculture.**

**Dr. Innocent Mugwagwa**  
Executive Director  
ECLT Foundation

**(ECLT, Switzerland)**

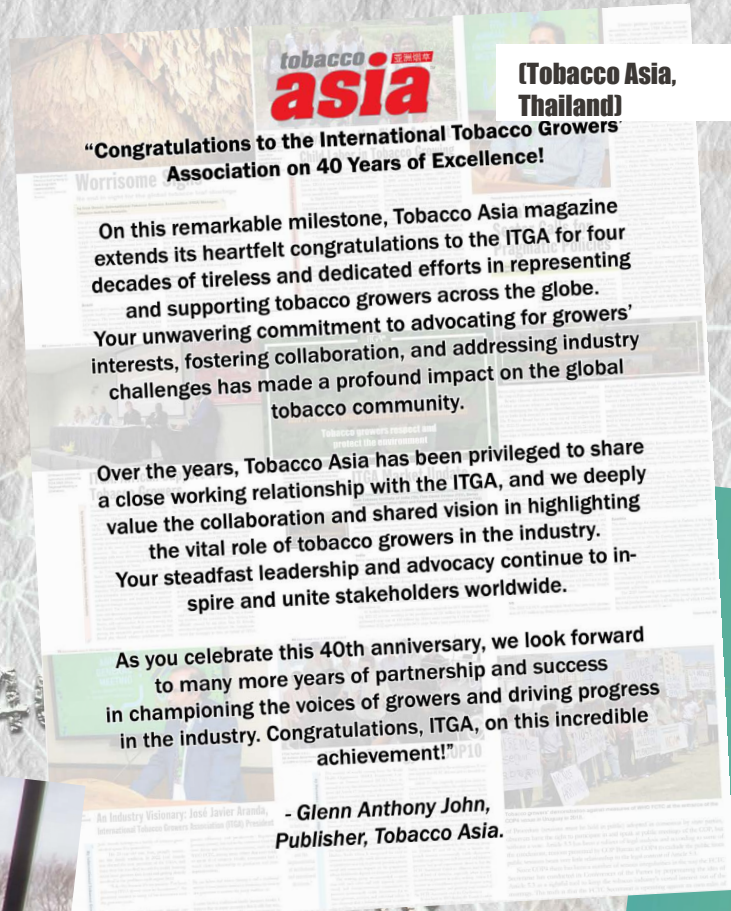
**TIMB**  
For Livelihoods. For Sustainability.

**40 years**

**(TIMB, Zimbabwe)**



**(InterTabac, Germany)**



**tobacco asia**

**(Tobacco Asia, Thailand)**

**"Congratulations to the International Tobacco Growers' Association on 40 Years of Excellence!"**

On this remarkable milestone, Tobacco Asia magazine extends its heartfelt congratulations to the ITGA for four decades of tireless and dedicated efforts in representing and supporting tobacco growers across the globe. Your unwavering commitment to advocating for growers' interests, fostering collaboration, and addressing industry challenges has made a profound impact on the global tobacco community.

Over the years, Tobacco Asia has been privileged to share a close working relationship with the ITGA, and we deeply value the collaboration and shared vision in highlighting the vital role of tobacco growers in the industry. Your steadfast leadership and advocacy continue to inspire and unite stakeholders worldwide.

As you celebrate this 40th anniversary, we look forward to many more years of partnership and success in championing the voices of growers and driving progress in the industry. Congratulations, ITGA, on this incredible achievement!"

**- Glenn Anthony John,**  
Publisher, Tobacco Asia.



**ITGA 40**  
International Tobacco Growers' Association

**Congratulation!**

Here's to decades of collaboration, growth, and global impact ahead.

**AGRIVI**

**(Agrivi, Croatia)**



**TJI TOBACCO JOURNAL INTERNATIONAL**

**Celebrating 40 Years of ITGA Excellence!**

Congratulations to the International Tobacco Growers' Association on reaching this incredible milestone! For four decades, ITGA has been a pillar of support, advocacy, and innovation for tobacco growers worldwide. Your dedication to fostering a sustainable future, empowering communities, and championing the voices of growers is truly commendable.

As you celebrate your 40-year journey, we honour the resilience and commitment of every member who has contributed to ITGA's legacy. Through the years, we have followed ITGA's path, and together we have built a collaborative relationship.

May the coming years continue to bring success, collaboration, and prosperity to all your endeavours.

Here's to the next 40 years of growth and achievement!

Warmest wishes, your friends from Tobacco Journal International

**(TJI, Germany)**



**Mensagem de aniversário à ITGA**

Em nome das empresas associadas ao SindiTabaco, parabéns a ITGA pelos 40 anos de atuação, sendo a voz dos produtores de tabaco ao redor do mundo.

Neste ano em que a ITGA completa 40 anos, ficamos felizes em ter essa importante Associação Internacional ao nosso lado na defesa da produção de tabaco. Nos juntamos à ITGA para combater campanhas antitabagistas e defender a cadeia produtiva do tabaco que gera empregos, renda, impostos e divisas para o Brasil, bem como a todas as nações produtoras.

Que tenhamos, por muitos anos, bons motivos para comemorar o 26 de novembro. Feliz aniversário à ITGA e parabéns a todos os que fazem parte dessa importante associação!

**Valmor Thering,**  
presidente do SindiTabaco, entidade sediada no sul do Brasil, país que lidera o ranking mundial de exportação de tabaco há mais de 30 anos, mantendo negócios com mais de 100 países todos os anos.

**(Sinditabaco, Brasil)**

**SINDITABACO**



**Cigarro Dominicano**

¡Cumplir 40 Años es todo un hito! Por eso todo el equipo de CIGARRO DOMINICANO felicita efusivamente a ITGA en este importante aniversario que marca una nueva etapa en la Asociación.

Les auguramos mucho éxito en los años por venir, deseándoles que sigan poniendo voz a tantas personas y organizaciones que dedican su vida a la noble planta del tabaco en diversos países del mundo y continúen siendo el faro de luz por el cual se reconozca la labor de todas las personas involucradas en la siembra y cosecha del tabaco a nivel mundial, rompiendo las barreras político sociales que actualmente quieren denostar esta práctica milenaria.

¡Gracias ITGA por llevar el TABACO en el corazón de la institución!

**Muchísimas felicitaciones desde República Dominicana les desean sus amigos de CIGARRO DOMINICANO.**

Turning 40 is a milestone! That is why the entire CIGARRO DOMINICANO team warmly congratulates ITGA on this important anniversary that marks a new stage in the Association.

We wish you much success in the years to come, hoping that you continue to give voice to the many people and organizations that dedicate their lives to the noble tobacco plant in different countries around the world and continue to be the beacon light by which the work of all those involved in the planting and harvesting of tobacco is recognized worldwide, breaking down the political and social barriers that currently seek to denigrate this ancient practice.

Thank you ITGA for bringing TOBACCO to the heart of the institution!

**Your friends from CIGARRO DOMINICANO wish you a Happy 40th Anniversary!**  
Congratulations from the Dominican Republic!

**(Dominican Cigar, Dominican Republic)**



**ADOCITAB**

Tamboril, 25 de noviembre de 2024

Señores  
Asociación Internacional de Productores de Tabaco  
Presente

Estimados miembros de la Asociación Internacional de Productores de Tabaco (ITGA),

En este significativo 40 aniversario, me complace extender mis más sinceras felicitaciones en nombre de la Asociación Dominicana de Cigarros y Tabaco (ADOCITAB). Este es un hito que no solo celebra cuatro décadas de arduo trabajo y dedicación, sino que también resalta el compromiso inquebrantable de la ITGA con la industria tabacalera a nivel mundial.

La labor que realizan para fortalecer la voz de los productores de tabaco y para promover prácticas sostenibles y responsables ha sido fundamental para el crecimiento y la resiliencia de este sector. Su liderazgo ha inspirado a muchos y ha contribuido al desarrollo de comunidades dedicadas a esta noble tradición.

Esperamos seguir colaborando y construyendo un futuro próspero para todos los que forman parte de esta gran familia productora de tabaco. En nombre de ADOCITAB y de la industria tabacalera dominicana, les reitero nuestras congratulaciones y mejores deseos para los proyectos y desafíos que vendrán.

¡Feliz 40 aniversario!

Cordialmente,

**Radhamés Rodríguez**  
Presidente  
Asociación Dominicana de Cigarros y Tabaco (ADOCITAB)

**(ADOCITAB, Dominican Republic)**

Tamboril, Santiago, Rep. Dominicana / Telf: (809) 580-5282 Fax: (809) 580-5289



# MESSAGE FROM ITGA PRESIDENT



**José Javier Aranda**  
ITGA President



"As we celebrate the 40th anniversary of the International Tobacco Growers' Association, I am deeply honored to reflect on the incredible journey that has brought us to this point. Over the past four decades, ITGA has been more than an organization; it has been a lifeline for countless tobacco growers around the world. Together, we have built a legacy of advocacy, represented the unique cultural heritage of our growers, and ensured their voices are heard in the most critical global discussions.

This milestone is not just a celebration of our past—it is a moment to look forward to our future. We stand at a pivotal time in history, where the challenges are greater but so too are

the opportunities. ITGA is committed to equipping our members with the tools, knowledge, and partnerships they need to thrive in an evolving world. From advancing sustainability in farming practices to fostering economic resilience, we will continue to place growers at the heart of the industry's transformation.

I want to extend my deepest gratitude to all our members, partners, and advocates who have supported ITGA's mission over the years. Your dedication and passion inspire us every day. Here's to 40 years of progress—and to many more years of building a brighter, more sustainable future for tobacco growers everywhere." 🌱



José Javier Aranda, ITGA 2024 Annual General Meeting (Closed Session) in Raleigh, North Carolina, USA

José Javier Aranda, ITGA 2024 Annual  
General Meeting in Raleigh, North Carolina, USA





# António Abrunhosa Shaped the History of ITGA During his Tenure



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

Since its inception, ITGA has worked tirelessly to provide a unified voice for tobacco growers globally. Its efforts have been pivotal in safeguarding growers' livelihoods amidst evolving regulatory landscapes, ensuring

*“ Since its inception, ITGA has worked tirelessly to provide a unified voice for tobacco growers globally. ”*

they remain active participants in industry discussions. Over the years, ITGA has established itself as a key representative of tobacco farmers, providing critical insights into how policies impact farming communities by preserving the traditions and heritage of tobacco-growing regions, highlighting the socio-economic role tobacco plays in many rural economies. Moreover, ITGA through its different leaderships, have built a platform that empowers growers, making their voices

heard and their concerns understood on an international stage.

I can think of some individuals whose remarkable contributions have shaped the history we are celebrating this year. However, one name stands out: António Abrunhosa.

António's visionary leadership and exceptional intellect have left an enduring mark on ITGA. For over two decades, ITGA benefited greatly from his extraordinary foresight and innovative mindset, which drove the organization forward in its mission to support and represent tobacco growers worldwide. He laid a solid foundation for ITGA to evolve into a globally influential organization. His leadership and contributions over more than two decades were instrumental in shaping ITGA's direction and impact. Without his visionary work, ITGA's history and trajectory would have been dramatically different.


I fondly recall the memories of working and traveling alongside António. His unwavering stream of ideas was a challenge to keep up with, yet always inspiring. His speeches, filled with meaningful insights and a deep understanding of the world, continue to resonate in the minds of all who had the privilege of listening to him.

Mercedes Vázquez  
ITGA CEO



Some of his quotes often come to mind, and one of my personal favorites is: 'If you don't want to pay the cost of education, try paying the price of not having it.' It serves as a powerful reminder of the long-term value of investing in knowledge.

On this milestone celebration of forty years, my thoughts are dedicated to him who inspired me to bring forth the very best I had to offer in my role. His vision and encouragement shaped not only my professional path but also my contributions to this organization.

I am confident that many of our Members, especially those fortunate enough to have known António, will echo the sentiments shared above. 

*“ António's visionary leadership and exceptional intellect have left an enduring mark on ITGA. ”*



António Abrunhosa, ITGA COP4 Global Campaign, Uruguay, 2010



Mercedes Vázquez, ITGA 2024 Americas Regional Meeting in Santa Cruz do Sul, Brazil



# ITGA at InterTabac/InterSupply 2024: Enhanced Participation



During the current year, ITGA's Secretariat has dedicated a lot of time to strengthening key partnerships in the tobacco sector supply chain, the information and analytics space and in terms of advocacy and exposure. One such partnership that is at the very top of the priority list is with the InterTabac/InterSupply – the biggest tobacco trade fair in the world.

The event takes place in Dortmund, Germany each September and attracts the “Who’s Who” in tobacco. Some of the impressive 2024 edition highlights include:

- 800+ exhibitors
- Approximately 70 countries represented
- All parts of the tobacco supply chain present
- Focus on new products, including



ITGA Stand at InterTabac InterSupply 2024

“Since 2023, ITGA has been an official partner of the trade fair duo gaining visibility in the exhibition center and leading a slot in the event’s conference.

cannabis

“The huge participation and lively interest once again leave no doubt that the twin shows are the world’s leading forum for innovation, professional dialogue and business transactions.”

Since 2023, ITGA has been an official partner of the trade fair duo gaining visibility in the exhibition center and leading a slot in the event’s conference. Alternatively, we are promoting InterTabac/InterSupply in all our meetings and publications driving further attention to the importance of the fair.

Last year, we started with a small size booth and a presentation on growers’ challenges. In 2024, we managed to secure a bigger space – the “Growers Corner” and organize a discussion panel featuring leading growers’ representatives from Belgium, Colombia, Poland, Tanzania, the United States and Zambia. The topic of

Ivan Genov  
ITGA Manager  
Tobacco Industry  
Analysis



ITGA at InterTabac InterSupply 2024  
Conference

discussion was tobacco yields, a theme we spent significant time researching and presented in the previous edition of the Tobacco Courier.

The “Growers Corner” was used by INBELTAB from Belgium, FEDETABACO and Bribon Cigars from Colombia, the Tobacco Cooperative Joint Enterprises (TCJE) from Tanzania and the Tobacco Association of Zambia (TAZ) to promote their products, to explore the



ITGA Debate Panel at InterTabac  
InterSupply 2024

“We are very grateful to ITGA, which allowed us to participate and take the first step towards the presence of Colombian cigars at InterTabac.

unparalleled networking opportunities, to see where the industry is heading and to ultimately increase their exposure. We share their feedback that summarizes the huge value in being at the center of where all industry players are getting together.

2025 will mark the third year of ITGA and InterTabac/InterSupply partnership and we are already planning the best possible experience for our members and partners yet.

Save the dates 18 – 20 September 2025!

\*

## INBELTAB

The invitation from ITGA to participate in the InterTabac Fair in Dortmund was special for me. As director of INBELTAB Belgium and tobacco grower, I felt it was an opportunity to be present and put Belgian tobacco growing in the spotlight.



Regine Feryn, representing INBELTAB

As a small tobacco producing country, I was proud to be able to present the 4 Belgian varieties. The interest shown was surprising and especially motivating to believe in a future for us.

The appreciation of the fair visitors gave me as a tobacco grower, a kind of energy to continue growing a quality product, tobacco that may be “seen” and deserves its place among the better tobacco varieties.

The colleagues, tobacco growers from other continents, who were also present at ITGA’s booth formed a group. An atmosphere in which we all had the same goal in mind, to put the tobacco grower in the picture.

Growing the tobacco plant is undeniably the beginning of the whole chain...

Without the tobacco grower, the smoker can’t enjoy its “smokables”.

All sorts of legislation don’t make us growers take it for granted. Staying on top of it will undeniably be the challenge in the future.

As a tobacco grower, together with INBELTAB Belgium, UNITAB and ITGA, I remain committed to supporting and defending tobacco growers.

The tobacco plant grows not only in the field but also in my heart.

**Regine Feryn, INBELTAB Belgium Director**

\*

## FEDETABACO

Colombia’s participation in the InterTabac trade fair is the most important experience that the country’s small cigar industry has had in its history and there are several reasons that lead us to conclude the above statement:

1. InterTabac is the largest and most important commercial window in which Colombian tobacco products have ever participated.
2. The knowledge acquired by the participants at the fair, in terms of product presentation, advertising systems, stand organization and presentation, transferring samples to Germany, marketing systems within the fair, commercial strategies after the fair, among many other lessons learned, fills us with great enthusiasm to continue moving forward.



FEDETABACO and Bribon Cigars  
representing Colombia

3. Gaining and deepening knowledge of what tobacco represents in the world, across the entire value chain, especially with regard to trends in the consumption of tobacco products.
4. To discover the challenges and opportunities that countries such as Colombia have in the tobacco sector, both in terms of cultivation and processing.
5. To have created a work agenda between ITGA and Colombia to position Colombian products (cigars) in international markets.

We believe that the expectations we had as a country with our participation in the InterTabac fair were far exceeded, for which we are highly grateful to ITGA, headed by Mercedes Vazquez, its CEO, and the entire team, for making our participation possible; actions like these are the ones that enhance ITGA in its mission.

**Heliodoro Campos, FEDETABACO Director**

## Bribon Cigars

We are very grateful to ITGA, which allowed us to participate and take the first step towards the presence of Colombian cigars at InterTabac, opening up a world of possibilities for expansion into new

“I came away as a tobacco grower feeling confident that there will still be need for us in the future.





TCJE and Spanish growers representatives

markets and a large number of very interesting contacts for future business.

**Juan Camilo Rodriguez, Bribon Cigars Founder and CEO**

\*

**Tobacco Cooperative Joint Enterprises (TCJE)**

TCJE had two representatives at ITGA's booth and conference during the InterTabac/InterSupply fair.

We had the chance to experience all parts of the supply chain from different countries, presenting various products and services.

This allowed us to make new contacts and link up with companies of interest.

We value highly the opportunity of talking during ITGA's conference on tobacco yields and present the challenges of Tanzanian tobacco growers to the international audience.



TAZ and UNITAB during InterTabac InterSupply 2024

We thank the ITGA for giving us the chance to be part of this enlightening experience.


**Benedict Kisaka, TCJE General Manager**

\*

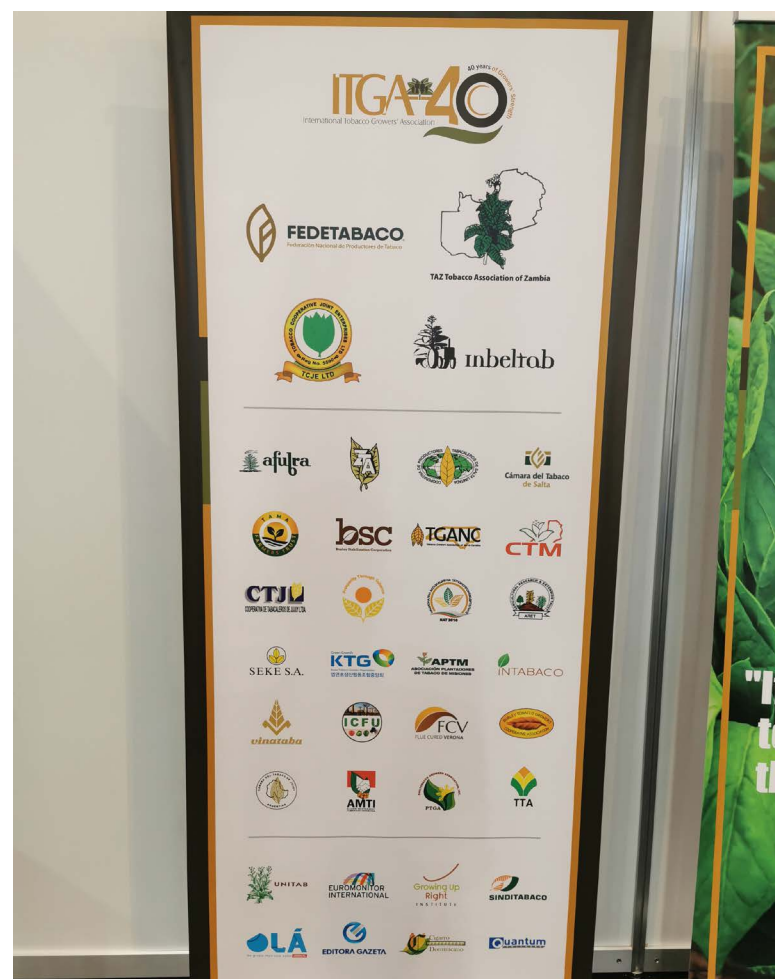
**Tobacco Association of Zambia (TAZ)**

I want to thank ITGA for having me as a representative of TAZ in the InterTabac/InterSupply trade fair. The expo was an eye opener on how the tobacco industry's future might look.

I had very interesting conversations with people from different companies on what part they think their product would play in the future.

I came away as a tobacco grower feeling confident that there will still be need for us in the future. I also feel ITGA had a good stand and I had an excellent overall experience. 

**Keld Jacobsen, TAZ Tobacco Grower**



ITGA booth at InterTabac InterSupply 2024, Dortmund, Germany



**We believe everything we do is to transform people's lives so that together we can grow a better world.**

**We are committed to**  
Minimal Environmental Impact  
Support for People & Communities  
Ethical & Responsible Business

**Learn more**  
[www.aointl.com](http://www.aointl.com)





### ITGA ESTABLISHMENT

Prior to ITGA, individual countries had little influence in international discussions on tobacco, and growers often lacked representation in global policy decisions affecting their livelihoods.

1984

### COLLABORATIVE EFFORTS WITH INTERNATIONAL STAKEHOLDERS

In the 2010s, ITGA established partnerships that focused on improving working conditions, supporting rural communities, and developing sustainable farming techniques.

2010s

### FOCUS ON SUSTAINABLE AGRICULTURE AND DIVERSIFICATION

ITGA began to address the evolving landscape by encouraging farmers to adopt eco-friendly farming practices and exploring alternative crops.

2020s

### STRENGTHENING REPRESENTATION AND PARTNERSHIPS

ITGA has collaborated closely with regional organizations, like UNITAB in Europe, to bolster its influence and ensure comprehensive representation for tobacco growers.

PRESENT

### ADVOCACY FOR GROWERS AMIDST WHO FRAMEWORK CONVENTION ON TOBACCO CONTROL (FCTC)

The 2003 adoption of the WHO's Framework Convention on Tobacco Control (FCTC) introduced a new era of tobacco regulation aimed at reducing tobacco production and consumption worldwide.

2003

### 2024 ITGA POSITIONING IN THE FUTURE

Like other agricultural commodities, tobacco exists in an ever-changing market environment. ITGA's unparalleled information capabilities that have been built over the last 40 years will be used in a new approach to tackle challenges and defend the interests of tobacco growers globally.

FUTURE

### MEMBERSHIP EXPANSION

In the 1990s and up to the 2000s, ITGA significantly expanded its reach, welcoming new member countries from Africa, Asia, Europe, and the Americas.

1990s  
TO 2000

### THE ELIMINATION OF CHILD LABOR IN TOBACCO FOUNDATION

2000 marked one of the most remarkable achievements in the history of ITGA and the tobacco industry as a whole: the ECLT was founded.

2000

**2003:** WHO FCTC Entry into Force: First Global Diversification and Alternatives to Tobacco Growing Conference

**2007:** John Keyser presented the findings in the technical document for the first meeting of the Ad Hoc Study Group on Alternative Crops established by the COP to the WHO FCTC

**2009:** ITGA Commissioned Studies: Energy Input for Tobacco Production Compared to Other Crops

**2010:** ITGA Commissioned Studies: The Role of Burley Tobacco in African Economies & Tobacco and Forests

**2012:** ITGA Second Global Campaign: Petition to Reject the Most Outrageous Set of Proposals by WHO FCTC

**2012:** First Celebration: World Tobacco Growers' Day  
**2012:** ITGA Commissioned Studies: Tobacco Value Chain

**2015:** Lilongwe Declaration: Acknowledged the Principle to Defend the Tobacco Growing Sector against the Threat of Exclusion

**2017:** COMESA Study: Tobacco Contribution in Africa

**2023:** First Celebration: World Understanding Tobacco Farming Day



# Save the Date! InterTabac 2025

World's Largest Trade Fair  
for Tobacco Products  
and Smoking Accessories

18 – 20  
September  
Messe  
Dortmund  
Germany



[www.intertabac.com](http://www.intertabac.com)

inter  
tabac

## ITGA 2024 Annual General Meeting: A Journey into the Practical Side of Farming in the US



**Ivan Genov**  
ITGA Manager  
Tobacco Industry  
Analysis



ITGA held its 2024 Annual General Meeting (AGM) in Raleigh, North Carolina. The birthplace of flue-cured “bright leaf” was the perfect location to wrap up a year full of activities – regional meetings in the Americas and Africa, global campaigns and numerous visits focusing on grower challenges.

Hosted by the Tobacco Growers Association of North Carolina (TGANC), the meeting included a four-day dynamic program concentrating on the practical side of farming in the US. Notably, ITGA's President José Javier Aranda was re-elected for another term by the association members. His efforts to defend the legitimate interests of farmers around the world have expanded to most of the leading tobacco growing markets. As a result, the AGM was attended by a record number of

delegates coming from Argentina, Brazil, the European Union, India, Malawi, the Philippines, Tanzania, USA, Zambia and Zimbabwe.

The meeting started with a guided tour of the Universal Leaf Factory in Nashville, NC. The facility is the biggest and most advanced plant of the company in the world. Today, it has the capacity to process the entire yearly US crop. Delegates from other regions were able to compare the process to their own markets but the sheer size of the facility is surely to leave them with a lasting memory. This was followed by a visit to a live auction, a unique experience that is rarely seen in any other place. For example, tobacco growers from Kentucky were sad to note that these are no taking place in their state.

The Open Day conference started with an overview of ITGA's strategic objectives.



*ITGA's President*

*José Javier Aranda was  
re-elected for another  
term by the association  
members.*

Currently, ITGA focuses on four pillars – information, tobacco sector advocacy, strategic partnerships and reinforcement of the membership base. ITGA CEO Mercedes Vázquez went through the association's substantial data reserves and capabilities, campaigns to help bring attention to the enormous socio-economic impact of tobacco growing, such as the 31 May World Understanding Tobacco Farming Day and the 28 October World Tobacco Growers Day and the recent participation in the InterTabac/InterSupply trade fair which gave an opportunity to four associations to get greater visibility. This is particularly important to entities such as FEDETABACO in Colombia, which went through an extraordinary transformation after leading companies left the market with very little notice and no alternatives.

Shane MacGuill, Euromonitor  
International Global Lead Nicotine &



Growers Panel, ITGA 2024 Annual General Meeting, Raleigh, North Carolina, USA



Cannabis, provided an in-depth global overview of consumption trends. MacGuill noted that the US market is emblematic of an ongoing realignment of consumption behaviour in the context of overall flat nicotine volume evolution. Among the most significant global tobacco drivers for the future will be regulatory innovation, including sustainability, cost of living crises and risk of impaired sensitivities and broadening of the nicotine universe. Currently, the Middle East and Africa is the definitive sole growth cigarette region against very significant declines in Europe and North America. The top volume growth cigarette markets in the next five years according to Euromonitor will be: Ethiopia, United Arab Emirates, Cambodia, Egypt and Lebanon, while the biggest volume declines are expected in New Zealand, Australia, Denmark, United Kingdom and Ireland. In the reduced risk products space, heated tobacco is establishing itself as the key format, as significant e-vapour value migrates to illicit. Euromonitor's estimates of the total nicotine market (excluding China), that includes legal and illicit sales and all categories, traditional and novel, indicate striking overall nicotine resilience. In stick equivalent terms, global volumes are expected to remain unchanged from 2018 to 2028. In addition, the reduced risk categories are gaining share of the total nicotine universe but by 2028 it is likely that cigarettes sales will still account for 3 in every 4 nicotine units. Regarding one of the newest tobacco categories – nicotine pouches, growth is predominantly centred in the US with no evidence of serious traction elsewhere. In beyond nicotine, manufacturers activity remains patchy as the cannabis revolution slows down.



ITGA President Mr. Jose Aranda, ITGA 2024 Annual General Meeting Open Day, Raleigh, North Carolina, USA

Ivan Genov, ITGA Manager Tobacco Industry Analysis, provided information

*While some expect the FCV market to balance in 2025 and burley in 2026, others, particularly in the audience, see this happening in a longer timeframe.*

about the other side of the coin – the key tobacco leaf production trends. In 2024,

the biggest tobacco variety – FCV was characterised by short crops. Unfavourable weather affected some of the leading FCV markets. In Brazil, more humid and warmer climate resulted in lower productivity – FCV final volume output was 461 million kg against 551 million in 2023. In Zimbabwe, where a State of Disaster was declared during the growing season, one of the lowest rainfalls on record was registered. Consequently, production went from 296 million kg in 2023 to 231 million kg in 2024. Alternatively, burley production is on the rise, with Malawi, being one of the year's star performers. The marketing season brought growth in both volume and value terms and expectations for an even better 2025. Another market to pay close attention to – Tanzania, was unable to reach the government target of 200 million kg. Nevertheless, local growers produced 116 million kg, twice as much as in 2022. The local ministry of agriculture remains optimistic that Tanzania could become the biggest tobacco exporter in Africa. In summary, demand for tobacco leaf continues to exceed supply on the global markets. Major leaf dealers report low levels of uncommitted stocks and tobacco is sold very quickly. Current forecasts suggest a larger crop in 2025, but problems that have built up for many years – thin profit margins for growers, lack of continuity and other social and environmental issues are now reaching a tipping point.

The topic was further unpacked in the Leaf Merchants Panel that was moderated by the host Graham Boyd, TGANC Executive Vice President, and featured leaf sales executives from Alliance One and Universal Leaf North America. While some expect the FCV market to balance in 2025 and burley in 2026, others, particularly in the audience, see this happening in a longer timeframe. Daniel Green, Burley Stabilization Corporation CEO, noted that three quarters of the US burley production is now realised on the local US market.

A Growers Panel moderated by Dr William Snell from the University of Kentucky featuring farmers with many generations worth of experience also sparked a lot of debate. Growers were united in the opinion that the meeting proves once again that issues faced by growers are the same in every market. Matt Grissom, TGANC President, shared another common notion for growers – they grow tobacco because they love to do it. However, underlying market changes are putting a very strong pressure on the community. The so-called US Tobacco

Buyout Program was also discussed in detail. In its beginning four things were expected to occur – concentration of farms, bigger farms, shift of production to the west and yield improvements. The first three happened but the last one failed to materialize, with yields remaining flat. This was also the key focus of ITGA research in 2024. The Association interviewed leading agronomy experts to find the reasons behind flat or declining yields, a trend that goes against other crops like corn, soybean and cotton. The research identified common factors impacting all growers, as well as ones relevant to small scale against commercial growers. After identifying the issue, ITGA will continue its pursuit to unpacking the game changers in farm productivity in the coming year.

The session also included a US regulatory update by Benjamin Dessart, Universal Leaf Vice President of External Affairs and a global regulatory overview by Michiel Reerink, Alliance One International, International Corporate Affairs Director and Managing Director. What is particularly important for growers is that certain suggestions are likely to impact the whole supply chain, not only consumption. These include, for example, the discussions around nicotine reduction in the US and

the Due Diligence Directive in the European Union. Tracking regulations that impact growers directly remain a key focus area for ITGA.

Another insightful experience for the delegates was visiting a NC Research Farm in Oxford, where Dr. Loren Fisher, Director of NC State Research Stations and Field Labs, explained how tobacco production research is done in the US – how is financing allocated, as well as technical aspects related to resilient varieties. ITGA delegates agreed that this is an incredible asset for local growers, one that needs to be kept at all costs. The group also visited a field where it was noted that crop failures are welcome in the research environment as they help in the pursuit for productivity improvements for the future.

Finally, ITGA delegates visited the NC State Fair where tobacco is featuring prominently in the program. The group witnessed a tobacco stringing contest that attracted a big crowd, visited TGANC Tobacco Pavilion that included historical artefacts and ultimately experienced firsthand the importance of agriculture for North Carolina. One sign made a big impression: "North Carolina still has pride in tobacco". Who else feels the same? 🇺🇸



ITGA 2024 Annual General Meeting, Closed Session, Raleigh, North Carolina, USA



ITGA 2024 Annual General Meeting, Raleigh, North Carolina, USA



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Live Auction



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- Smoking, e-vapour and heated tobacco prevalence and population
- Illicit trade volume sales



## Malawi Country Report



### WEATHER UPDATES

Planting rains came in December 2023 for the recently finished season in Malawi. There was a dry spell lasting for a few weeks in January going into February due to the El Nino phenomenon. Grain crops yield was heavily affected as the dry period coincided with the critical time for development. Negative effects on tobacco production were relatively low as most of the crop is produced in the areas not severely hit by El Nino – Central and North.

### SEASONAL STATISTICS

The 2024 tobacco marketing season recorded some fair pricing as the average reached USD 2.98 per kg, which is the highest in decades. In the years since 2020, Malawi has not produced enough to meet the annual demand, with lowest production being 85 million kg and the highest at 124 million kg. The 2024 estimation was 140 million kg but ended up around 133 million kg.

Malawi's Progress in Agricultural Labour Practices

A lot of changes have been recorded in the Malawi tobacco industry in recent years largely because of pressure from global campaigns. One is linked to agricultural labour practices.

Child Labour and Forced Labour (tenancy) were highlighted for Malawian farms and led to barring of Malawi tobacco into markets like USA in 2019 (Withhold Release Order by US Customs). The fight against child labour practice has been ongoing for over a decade and is being won. TAMA as a farmers' body has been working with organisations including the ILO, ECLT, ITGA and tobacco buying companies in this campaign.

Tenancy has now been outlawed through a legislation, while TAMA is running an aggressive sensitization campaign on the ground. ILO is providing support in this campaign and so far, success is being registered. Contracted farmers are also being assisted by buyers who are providing cash for wages payment to avoid tenancy. TAMA is working with community leaders to establish reporting lines in case child labour cases are noted.

TABLE: TOBACCO PRODUCTION IN MALAWI

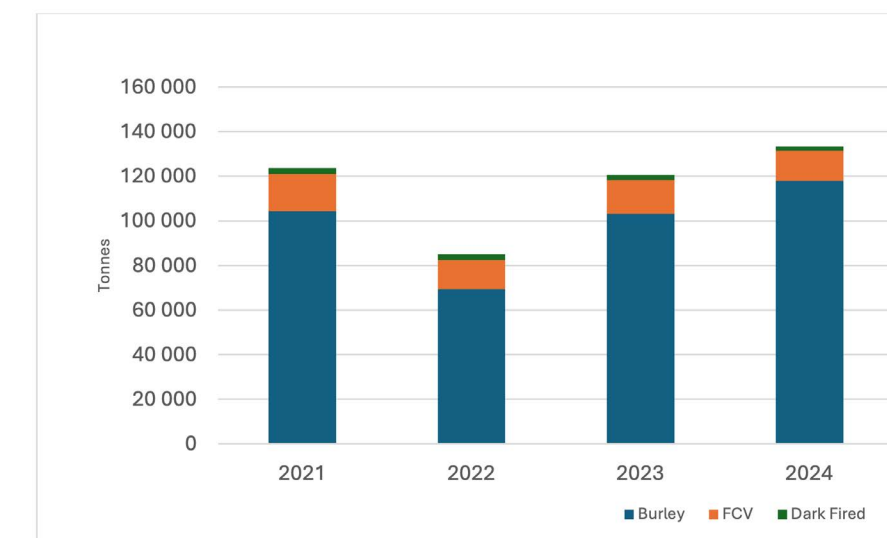
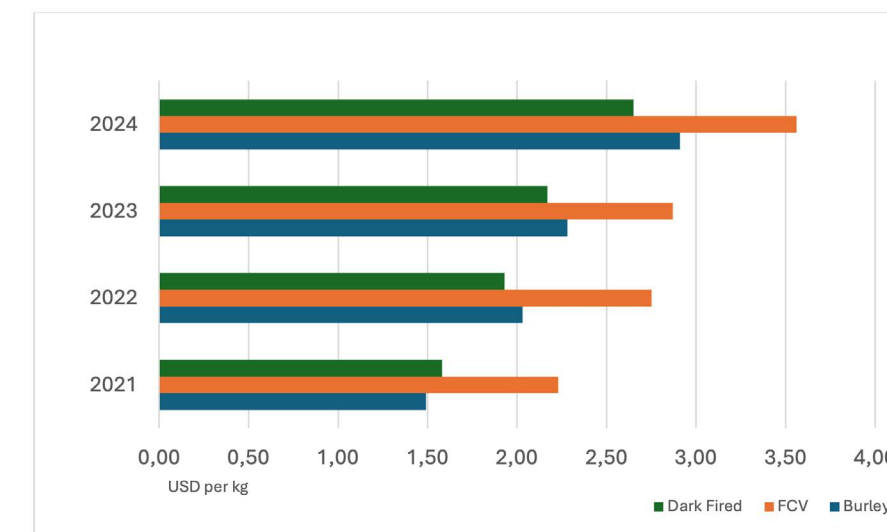


TABLE: TOBACCO PRICING IN MALAWI



Malawi Delegation, ITGA 2024 Africa Regional Meeting, Lusaka, Zambia



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## Abiel Kalima Banda

*ITGA President 2019-2022*



### Current and previous positions:

President of TAMA Farmers Trust, Immediate  
Past President of ITGA

### Your time in the ITGA:

2017 – 2019 Vice President, 2019 – 2023 Pres-  
ident

### Other relevant experiences:

FUM – Farmers Union of Malawi:  
- Treasurer (2009-2012)  
- Vice President (2012 – 2017)

### What was ITGA like when you were the Pres- ident?

ITGA continued to be the voice of tobacco  
farmers globally, with membership on all five  
producing continents.

### Can you share the best memories from your ITGA presidency?

The AGM in the Dominican Republic where  
I was elected as Global President and Africa  
AGM of 2019 which TAMA hosted along Lake  
Malawi.  
- in these meetings, I managed to meet dele-  
gates from other countries and share notes,  
more important as I was new in the position.

### What were the main challenges during your tenure at the association?

Covid-19 posed the biggest challenge during  
the period I was in office. We couldn't hold  
physical meetings, and the tobacco trade  
globally was disrupted, just as other busi-  
nesses were negatively affected.  
Also noted were declining contributions from



*As an active  
tobacco farmer*

*and former ITGA President,*

*I urge fellow farmers to  
continue being united and  
practice what is required to  
produce a compliant crop.*

tobacco industry partners.

### What were the achievements you are most proud of?

Despite Covid-19, ITGA managed to keep  
members informed and e-meetings were  
promoted such that the farmers were kept  
updated.  
During Covid-19, ITGA managed to work on  
some programs to reduce the risk of ren-  
dering crops non-compliant due to labour  
shortages.

### How has the organization changed during the years?

Due to the 2.5 years of Covid-19 restrictions,  
not much has changed in ITGA as there has  
been limited interaction. But there is hope  
that new member countries will join soon.

### In your opinion, what is the value of ITGA in the global tobacco sector context?

ITGA is the farmers' voice in a global business  
that is meeting opposition from very strong  
parties who want to kill the business without  
offering alternatives. As such, farmers need to  
work in unity if there are to succeed, hence  
ITGA.


### How do you see the future of tobacco growing from your current standpoint?

Much as tobacco production is meet-  
ing restrictions, there is a good demand  
available that needs to be met. What is  
required is to produce the crop in a sus-  
tainable manner so that it is compliant  
with the trade conditions being developed.  
Currently, there is no well-defined alternative  
for most member countries, as such produc-  
tion will continue to meet the demand avail-  
able.

### Many of the former ITGA Presidents are being interviewed for the current edition of Tobacco Courier. Do you want to send them a message?

My message to fellow former ITGA Presi-  
dents is that we need to assist the secretari-  
at through collaborations with institutions of  
importance in our countries and regions.

### Please share your final words with our read- ers.

As an active tobacco farmer and former ITGA  
President, I urge fellow farmers to continue  
being united and practice what is required to  
produce a compliant crop, at the same time  
ensuring that farms are able to make a profit  
to sustain livelihoods. 



Dr. Albert Changaya and Mr. Abiel Banda, ITGA 2024 Africa  
Regional Meeting, Lusaka, Zambia, Field Trip



Mr. Abiel Banda and Malawi Delegation, ITGA 2024 Africa  
Regional Meeting, Lusaka, Zambia, Field Trip



# Tanzania Country Report



## BACKGROUND

Tanzania is currently among the leading tobacco producers in Africa and in the world. The country has the potential of producing above 300,000 tons per annum.

Tanzania's tobacco sector is mainly comprised of small-scale farmers. In the 2023/2024 season, a total of 92,811 growers were registered. They are organized in cooperatives from primary, regional and national level. The national representation – the Tobacco Cooperative Joint Enterprises (TCJE) is ITGA's member.

Tobacco is among the five strategic crops in the country and among the top six crops in terms of foreign exchange earnings. The industry engages directly and indirectly more than 2.5 million people.

Targeted Government interventions in supporting the tobacco industry led to improvements and production volume growth in the recent seasons. Tobacco production has increased from 37,546 tons in 2019/2020 to 122,859 tons in the 2022/2023 season.

## GOVERNMENT AMBITIONS

The Minister of Agriculture – Mr. Husein Bashe noted that for the 2024/2025 season they are optimistic to reach 200,000 tonnes against the target of 300,000 by 2025/26. Mr. Bashe applauded Tanzania's farmers' associations and tobacco companies, stating that for the first time more than 50% of tobacco has been bought and sold abroad by local companies.


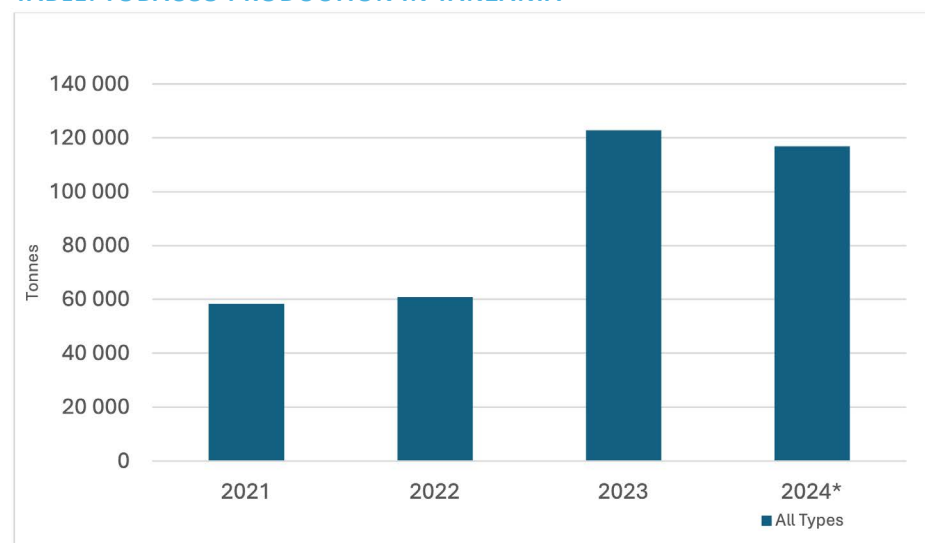
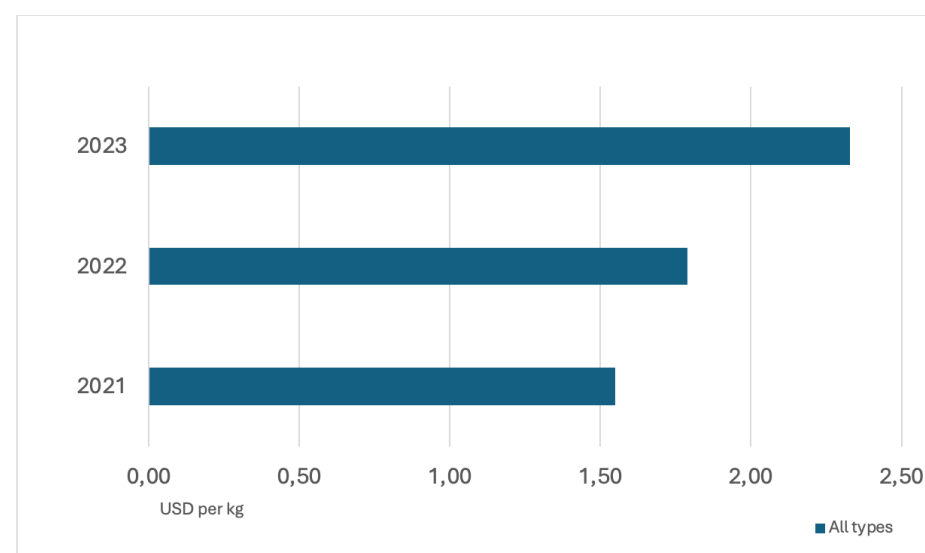
"It was not an easy journey. I thank all the Tobacco Board workers, we dreamed, we did it, keep pushing. We will become Africa's No1 producer". Mr. Bashe also played a leading role in bringing ITGA's 2023 Annual General Meeting to Tanzania. The country is also trying to bring up value creation by encouraging factory constructions by foreign investors. 

TABLE: TOBACCO PRODUCTION IN TANZANIA



\*All tobacco types preliminary data

TABLE: TOBACCO PRICING IN TANZANIA



Tanzania Delegation, ITGA 2024 Africa Regional Meeting, Lusaka, Zambia

# Zambia Country Report



## TOBACCO ASSOCIATION OF ZAMBIA (TAZ) MAIN GOALS:

Promote Brand Zambia: Elevate the reputation and recognition of Zambian tobacco.

Enhance Local Value Addition: Increase the processing and value addition of tobacco within the country.

Ensure Full Traceability: Maintain comprehensive tracking of tobacco production from farm to market.

Promote Competitive Marketing: Foster a competitive market environment for growers' tobacco.

Adhere to Global GAP Requirements: Ensure that the tobacco produced meets global Good Agricultural Practices (GAP) standards.

## DISPARITIES AND RECOMMENDATIONS

Compliant Production: Contracted farmers endeavour to comply with rules and regulations but get paid the same, if not less than uncontracted farmers.


Incentive: Tobacco companies should offer more financial incentives to compliant contracted farmers to not purchase any tobacco that is noncompliant. By addressing this disparity, a profitable and sustainable tobacco production platform can be guaranteed. 

TABLE: TOBACCO PRODUCTION IN ZAMBIA

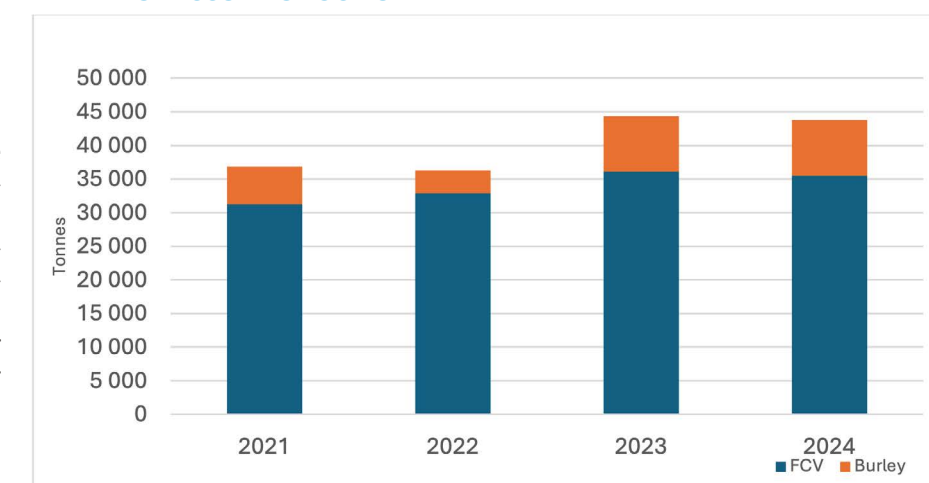


TABLE: TOBACCO PRICING IN ZAMBIA



ITGA 2024 Africa Regional Meeting, Lusaka, Zambia



Zhvikonyo Mahombe, ITGA 2024 Africa Regional Meeting, Lusaka, Zambia



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# Zimbabwe Country Report



Zimbabwe Tobacco  
Association



ITGA MEMBERS' REPORT

## IMPORTANCE OF TOBACCO GROWING

Over 140,000 farmers and their families are involved in the production of tobacco in Zimbabwe, bringing over USD 700 million per annum. Over one million people are directly involved in the value chain and two million depend on tobacco production (or 13% of Population). The crop contributes 12% of country's foreign currency earnings and 50% of Agriculture GDP. However, less than 10% of it is value added.

### 2023/2024 SEASON OVERVIEW

One of the lowest rainfalls on record – comparable to the 1991/92 drought. In April 2024, a National State of Disaster was declared. Tobacco though more tolerant to droughty conditions was negatively affected due to the rainfall distribution pattern. More tobacco went under supplementary irrigation, while those without one suffered from plant stunting, nutrition deficiencies and low yields. While hectares planted remained static, plant population declined, and yields followed. Quality has been acceptable. Final FCV production was 234 million kg down from the 296 million kg in 2023. Weather variances negatively affected a number of producing countries with global supply under demand and declining stocks. This resulted in high prices paid in many producing countries. Zimbabwe FCV price moved up 12% to USD 3.43 per kg. However, this is the same price paid 10 years ago. Lower volumes with high borrowings resulted in increased side marketing and debt recovery ratios lowered.

### 2024/2025 SEASON OUTLOOK

Weather – current forecast is for normal to above normal rainfall but with a late start of rains.

Early indications on the back of good prices are that total plantings may increase, with an increase in seed sales.

Early crop has been planted out and progressing well. Land preparations are ongoing.

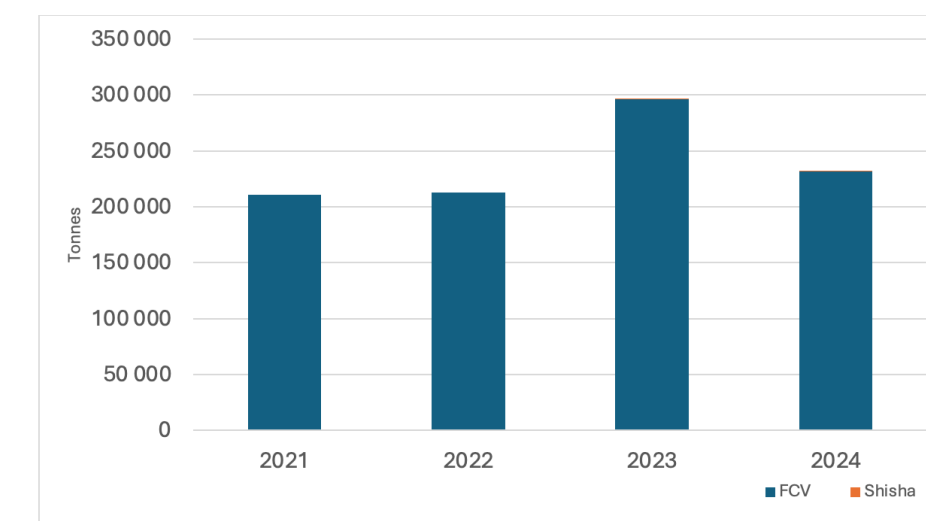
Water constraints for dryland seedbeds and general irrigation due to low dam levels following the 2023 drought.

Severe power supply constraints – loss in hydro generation.

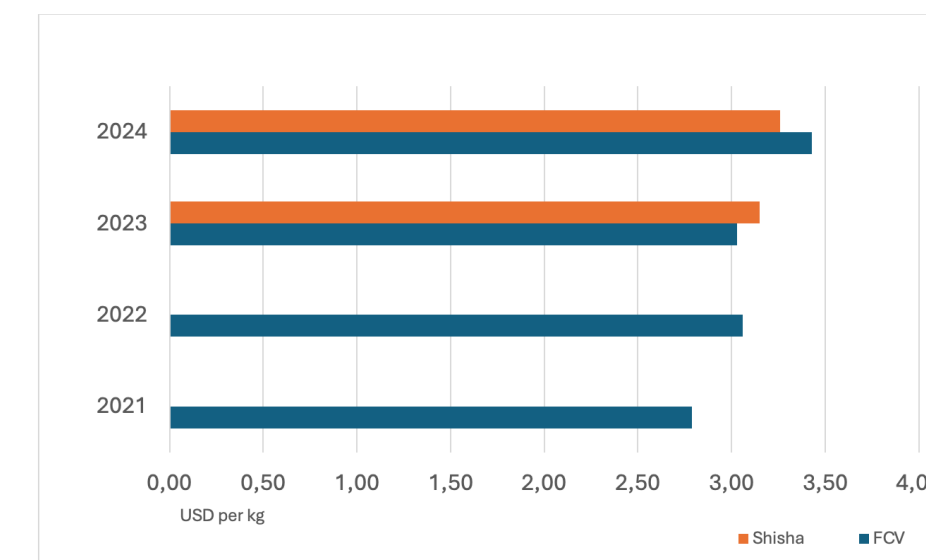
### POTENTIAL OUTPUT: + 300 MILLION KGS.

Global shortage of tobacco will remain, though stock levels will start to improve, and prices expected to remain stable. 🇿🇼

## TABLE: TOBACCO PRODUCTION IN ZIMBABWE



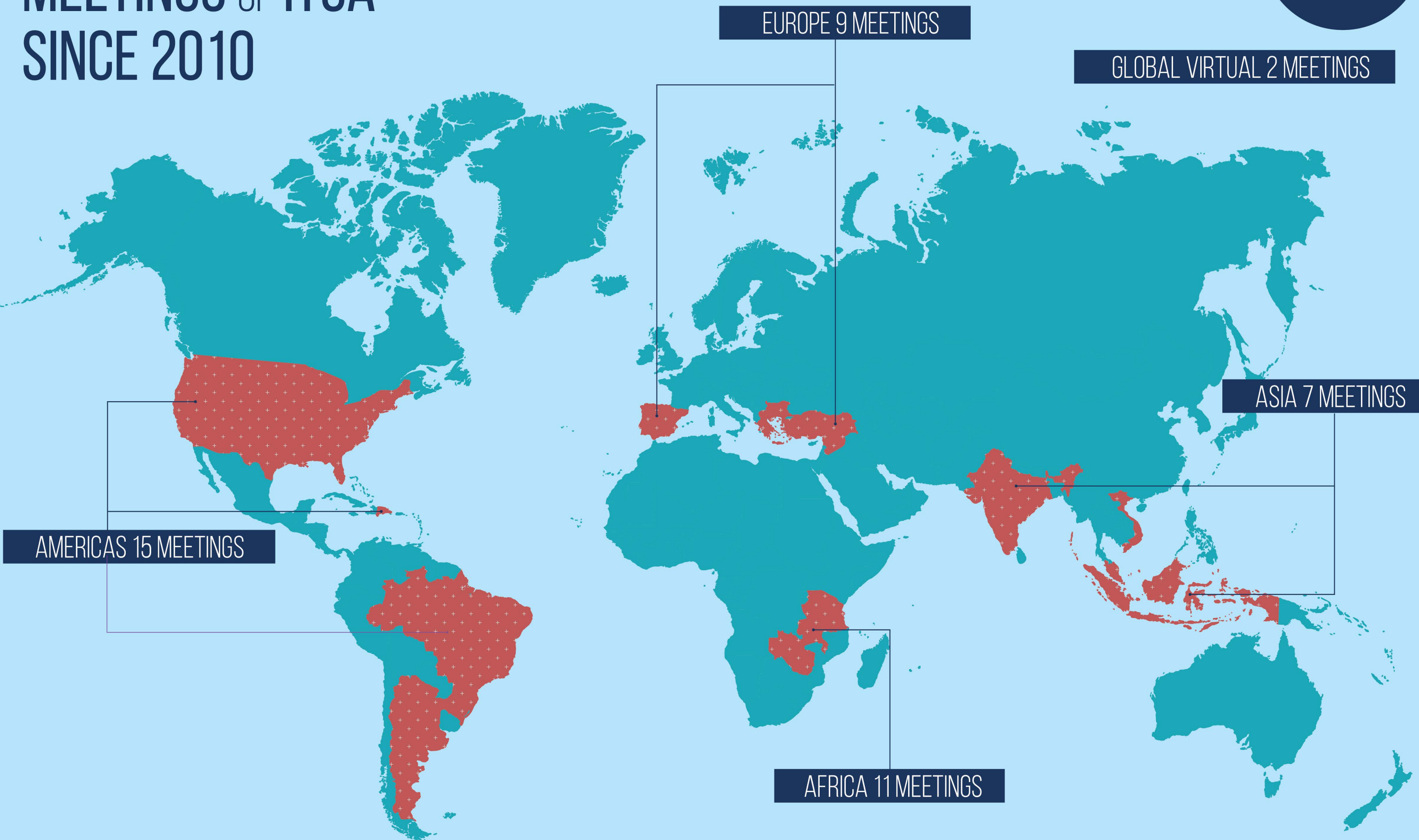
## TABLE: TOBACCO PRICING IN ZIMBABWE



ITGA 2023 Africa Regional Meeting, Harare, Zimbabwe



# REGIONAL AND ANNUAL MEETINGS OF ITGA SINCE 2010





# Argentina Country Report



## LEAF TOBACCO AND ADDED VALUE PRODUCTS



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### Misiones Province

#### CROP 2023-2024 SUMMARY

The season in Misiones saw excessive rains during the entire cultivation and curing period. In addition, the huge gap between the official exchange rate and the black market remains a major issue. There are also uncertainties with the new National Administration about key topics like import and export taxes, the Tobacco Special Fund and the currency instability.

As a result of the climate conditions, yields dropped by 30% on a yearly basis, but prices for growers registered strong increases, reaching USD 3.50 per kg for the leading burley variety. Illicit trading in farming remains prevalent and debts for financed inputs are often left unpaid.

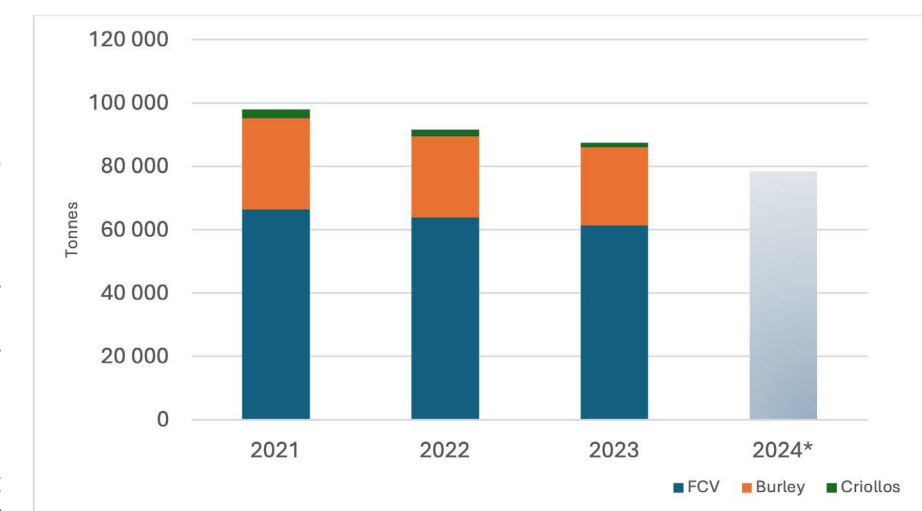
#### CROP 2024-2025 EXPECTATIONS

So far, there have been favourable environmental conditions and rainfall according to the crop needs. Macroeconomic context is also improving with the example of reduced taxes on imports. Alternatively, interest in other crops is going down, while tobacco remains solid.

### Salta Province

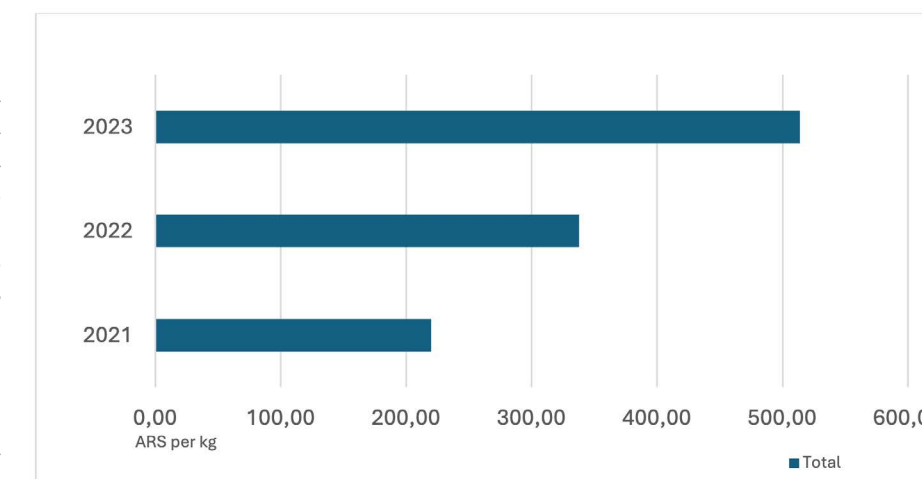
Salta's tobacco production of 30.8 million kg accounts for more than a third of Argentina's total production in 2024 and is an essential source of income for the local communities. The area used for planting is 19,295 hectares, involving close to 2,000 growers. It is estimated that tobacco growing sustains over 50,000 families in Salta or nearly a fifth of the province's population. In the 2024-2025 campaign a total of 35 million kg of FCV tobacco are expected to be produced.

TABLE: TOBACCO PRODUCTION IN ARGENTINA



\*All tobacco types preliminary data

TABLE: TOBACCO PRICING IN ARGENTINA



Note: Argentinian currency has been highly volatile in the last 3 years



Ms. Mercedes Vázquez, Mr. José Aranda and Mr. Marcílio Drescher;  
ITGA 2024 Americas Regional Meeting, Santa Cruz do Sul, Brazil



# ITGA 40<sup>th</sup> Anniversary Spotlight

## Interviews: Misiones, Argentina

**Chantal Stapel**

*Sustainability Coordinator de CTM  
Cooperativa Agroindustrial de Misiones Ltda*



### ITGA's importance in the global tobacco supply chain.

The growing complexity of the global economic, social and environmental context, the increasingly extensive and stringent regulatory frameworks, the pressures exerted on tobacco growers by a growing number of environmental sectors, non-governmental and governmental organizations, as well as global organizations such as the WHO, with its Framework Convention on Tobacco Control, continually pose new challenges. The ITGA is a clear example of the proverb "l'union fait la force", which although its exact origin and author are unknown and was first uttered in the 18th century, even in the modern world and in today's age of artificial intelligence is still valid. The ITGA brings together growers and representatives of tobacco growers from 5 continents; regardless of their geographical location, all with similar interests and the same objectives: to develop a true annual cycle of cultivation and production that seeks to achieve a fair balance between the 3 pillars: social, economic and environmental, which is profitable and supported by the efficient use of resources and thus sustains the foundations that at the end of the cultivation chain lead to meeting the prospects of a better quality of life and higher incomes for growers and their families and indirectly contribute to the socio-economic development of the community in which they operate. It is a group that meets regularly and shares information, problems, weaknesses and strengths of the sector and this fact that it is aligned and united undoubtedly gives it great power in the face of the many challenges facing the sector and its collective voice becomes stronger in articulating with public entities and global organizations. Its fortieth

anniversary demonstrates that thanks to the group's integrity, it has managed to survive the storms and economic ups and downs, which gives it credibility as a global platform.

### A moment that stays in the memory.

The presence of a large delegation of members from all over the world to lobby in front of the hotel where COP4 was being held in Punta del Este, Uruguay, in 2010. A true sign of being heard worldwide as a global advocate for tobacco growers everywhere. Discussion on the profitability of the crop in terms of real income. The gap is narrowing between the increasingly high costs at field level due to inflationary asymmetries and unstable economic scenarios, with investments in infrastructure and tools to comply with good agricultural practices and sustainability programs of increasing scope, and the monetary return with green prices that are governed by the same economic and financial scenario. I came to the conclu-

sion that all the countries present at that meeting were struggling with the same problem. In turn, since the green price and the agronomic cost are the starting point for the FOB price that is negotiated and offered by the industry according to the needs of the market and the inventories of pre-industrialized tobacco, the profitability of the processing companies is also affected. It should be noted that all the events and meetings bring joy through reunions and socializing with members and loved ones who have known each other for many years. This is priceless.

### The future of tobacco growers in the new realities of the sector and the role of ITGA in this context.

As mentioned at the beginning, the complex global nature of the business world, the evolution of the principle of social responsibility and the resulting climate change have led the industry to incorporate sustainability as its best ally and its main tool for combating multi-


ple pressures. This proclamation of the need for greater transparency in the way business is done and the challenge of being sustainable naturally carries over to tobacco growers. All those involved in the sector fall under the umbrella of sustainability. Currently, sustainability is a mandatory condition to be met if growers want to participate in the international market. It requires an explicit commitment to comply with all laws and regulations governing cultivation and trade operations, and to respect human rights.

I understand that there is a progressive trend to develop more and more intensive programs such as Good Agricultural Practices (GAP), Farm Labor Practices (FLP), Sustainable Tobacco Production (STP), responsible water management, to name a few. These programs are very dynamic and expand from harvest to harvest and include measurement systems, data collection and trend monitoring, internal reviews and external audits, due diligence and efficient use of resources, cost management and production profitability. Taken together, they tend not only to strengthen tobacco growers' ability to grow tobacco under sustainable parameters, but also to build trust and strong business ties with international tobacco buyers and other stakeholders.



CTM Delegation, ITGA 2024 Annual General Meeting, North Carolina, USA, Field Trip

The ITGA, as a globally accessible organization for tobacco production, could, as far as possible, keep itself up to date and optimally informed about the progress of new requirements and the application of new laws in the sustainable framework, which usually emanate from global government organizations, and further strengthen the communicator role of its members. In this way, the sector can, to some extent, anticipate developments that will have an impact on the market and respond strategically with agronomic and

socio-economic measures or whatever is necessary. The thematic days held at each Annual General Meeting are one of the ways to update information and benefit from the knowledge and experience of the guest speakers. Apart from some differences in terms of geographical location, idiosyncrasies and/or the economic and financial situation of each country, growers around the world often face the same cost problems and sustainability requirements, cultivating a strong connection to our tobacco business. 



CTM Delegation, ITGA 2024 Annual General Meeting, North Carolina, USA, Field Trip



CTM Delegation, ITGA 2024 Annual General Meeting, North Carolina, USA, Field Trip



# Roger Quarles

ITGA President 2008-2010



## Current and previous positions:

Several previous leadership positions in local agriculture groups culminated in being president of the Burley Coop for 7 years. I continue most local presence in the groups.

## Your time in the ITGA:

I attended the 2001 ITGA AGM in Lisbon, leaving as the finance chair. It led to ITGA presidency several years later.

## Other relevant experiences:

I still serve an ATAC trade position regarding tobacco in USDA and FAS in Washington DC. After years of no progress advancing Growers' situations in the USA, I lead the dissolution of the Burley Coop which is distributing over \$30 million assets to app 2600 past members including app 500 current growers.

## What was ITGA like when you were the President?

ITGA was growing its presence around the globe. Child labor was becoming a nuisance to the buyers, who resisted changes but ultimately joined in solutions. CEO António Abrunhosa was tasked to implement this difficult directive among the leaf buyers and interested NGO organizations. Growers were not united in any direction since buyers prefer to play every country against the other to limit prices while controlling even minute production practices in any country.

## Can you share the best memories from your ITGA presidency?

Memories include traveling to member countries meeting growers and governmental representatives and sometimes local buyers of our leaf. Lasting friendships endure today. My wife was an integral part of these friendships, making my position easier. I pleasantly recall the effort to gather millions of grower petitions to hand deliver to the COP 4 secretariat in Punta de Este asking for our presence in the COP discussions. Then being forcibly escorted to the hotel door, admonishing our attendance. Growers make huge personal sacrifices to attend these meetings every year.

## What were the main challenges during your tenure at the association?

The main challenges are somewhat the same as today. Conducting meetings with desired respect to all attendees. Most countries have local depressed conditions and markets from time to time as the major manufacturer make decisions in those countries. The changes can be devastating...such as the end of Colombia's production. Emotions can be high in these meetings. The comments are deserved to be heard.

## What were the achievements you are most proud of?

Again, see answers to 1 and 2. The ECLT has continued great success. The current information exchange by the Courier and Monitor is amazing. I'm disappointed we cannot have some measure of limiting production to con-

*I pleasantly recall the effort to gather millions of grower petitions to hand deliver to the COP 4 secretariat in Punta de Este asking for our presence in the COP discussions.*

trol price fluctuations. The difference in production costs is too severe. I wish we could have devised a global scheme to include grower self-labor and management values to enter into parallel price determinations. It remains the most undefined item in setting final prices.

## How has the organization changed during the years?

It's a sea change from its inception to today. Leaf needs are totally different. Burley is in far less demand. Supply chains are disrupted.

ITGA finances are challenged with far fewer supporters as mergers continue globally. These are challenges to the membership as well as local growers.

## In your opinion, what is the value of ITGA in the global tobacco sector context?

With the financial restraints from supporters and the inability of growers to self-finance, I agree the program of information distribution is an important asset to country growers to plot their own path.

## How do you see the future of tobacco growing from your current standpoint?

Leaf growing will continue to shift to the lowest-priced areas. Notice, I didn't say the lowest production cost area. India, most of Africa, and of course South America will be the volume areas. South America will lose volume to Africa and India eventually. Some Local production will remain to be political production to smooth manufacturers' presences in most countries, as they use that to limit tobacco consumption efforts. China along with the remaining major manufactures' will be drivers in volumes and prices. Growers will continue to have to appraise their personal situations to enlarge or go in other directions as markets shift to lower-priced areas. The PMI goal of IQOS will certainly affect everyone, but initially Burley growers with no leaf inclusion in that product. The goals of no consumption led by the Campaign for Tobacco Free Kids with COP influence will gain further acceptance.

## Many of the former ITGA Presidents are being interviewed for the current edition of Tobacco Courier. Do you want to send them a message?

I continue to admire past and current and future Presidents giving their personal time to lead our Organization as the only global leaf organization. It's a difficult chore to sit with member countries' growers at AGM who all are in competition to increase or maintain local volumes with the only path to take volume away from other countries.

# Jorge Nestor

ITGA President 2010-2012



## What was ITGA like when you were the President?

It was a very strong organization with the active participation of all its members.

*ITGA from its inception has played a key role in defending the sector.*

## Can you share the best memories from your ITGA presidency?

The annual meetings were always memorable moments. Because there, besides analysing the sector's problems, it was great to meet friends and leaders from each of the member countries.

## What were the main challenges during your tenure at the association?

The biggest challenge was to find ways to deal with the WHO offensive, which at the time had tobacco as its number one enemy.

## What were the achievements you are most proud of?

The harmony that could be achieved among all regions and countries in defense of tobacco production as the agricultural activity with the greatest social impact worldwide.

## How has the organisation changed during the years?

My answer will not be objective because I have been out of the business for 10 years.

## In your opinion, what is the value of ITGA in the global tobacco sector context?

ITGA from its inception has played a key role in defending the sector, and the most important thing from my point of view is the integration that could be achieved through globalization, despite the distance between countries and continents.

## How do you see the future of tobacco growing from your current standpoint?

The impact of all the restrictions is highly variable, but for many growers' tobacco is a significant source of income.

## Many of the former ITGA Presidents are being interviewed for the current edition of Tobacco Courier. Do you want to send them a message?

Of course, it is a good opportunity to greet all those who will be taking over the ITGA presidency.

*To all my friends and to the tobacco farmers whom I did not know, I send my warmest greetings and encourage you to stay united.*

## Please share your final words with our readers.

To all my friends and to the tobacco farmers whom I did not know, I send my warmest greetings and encourage you to stay united, for there is strength in unity.



Mr. Jorge Nestor, ITGA 2011 Annual General Meeting, Arusha, Tanzania



# Brazil Country Report

## Afubra

### SEASONAL UPDATES

In the 2023/2024 season, 509 out of the 1191 municipalities in the Southern States of Brazil – Parana, Santa Catarina and Rio Grande do Sul produced tobacco leaf. The crop accounts for just over half of the agricultural activities of local growers, while animals for a quarter and vegetables for the remaining fifth. Notably, tobacco growers' per capita income reaches USD 9,860. A total of 133,265 families are involved in the production of tobacco leaf. Out of this number, more than 37,000 tobacco families do not own any land. The system in place provides them with a dignified way of life and a reason to stay in rural areas. Another 50,000 work on 1 to 10 hectares and nearly 30,000 on 11 to 20 hectares. Only 877 families have more than 50 hectares of tobacco leaf planted.

The end of the season was marked by devastating floods that hit Rio Grande do Sul causing more than 180 fatalities and displaced hundreds of thousands. Despite this, the incoming tobacco season is expected to bring growth in production, according to initial estimates. 2024 ExpoAgro Afubra Trade fair

The 22nd Expoagro Afubra trade fair, the biggest fair family farming event in Brazil, came to a close with 154,500 visitors. 73% of the attendants were farmers and 17% new visitors. The 2024 edition, which had been scheduled for 19 – 22 March, occurred in three days only, because the third day (March 21) had to be cancelled due to a windstorm that wreaked havoc in the Fair Park and caused significant damage. This edition comprised more than 500 exhibitors, of which 216 were family agro-industries. Expoagro is organized by Afubra and its aim consists of providing knowledge and information about new crops, technologies and innovations of interest to all farmers, whilst encouraging crop diversification, sustainable production and rural succession. ITGA's Regional American Meeting was held on the eve of the Fair, and so all participants had a chance to visit the Fair in person.

In Rio Grande do Sul, for the 2023/2024 crop year, bill 15.958/2023 became Law, whereby it is mandatory for the compa-

nies to grade the tobacco at the farms where it is produced. However, before commercialization started, an injunction was granted by the Court, exempting

the companies from complying with the new law this crop year. Consequently, it will enter into force in the 2024/2025 growing season. <sup>16</sup>

TABLE: TOBACCO PRODUCTION IN BRAZIL

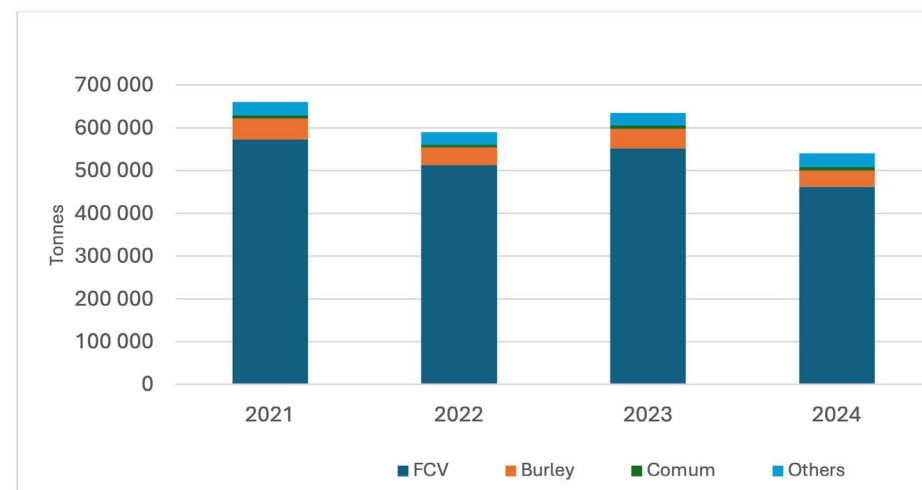
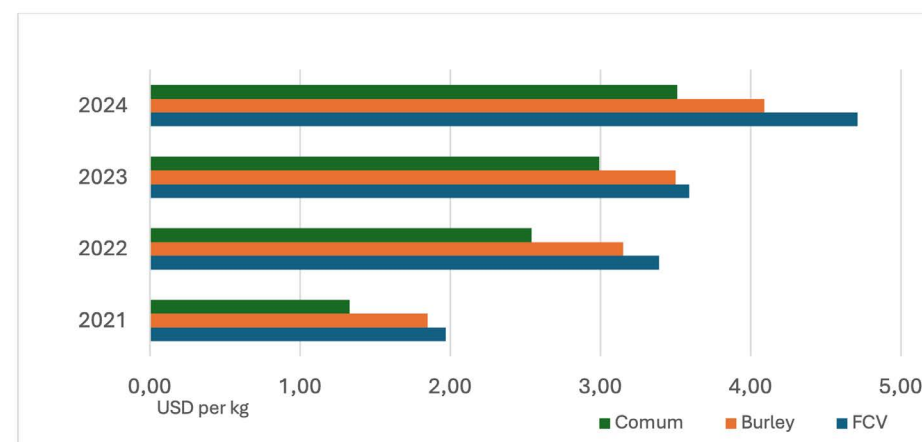


TABLE: TOBACCO PRICING IN BRAZIL



Mr. Marcílio Drescher, ITGA 2024 Americas Regional Meeting

# ITGA 40<sup>th</sup> Spotlight Anniversary Interview - Colombia

**Heliodoro Campos Castillo**

Executive Director of the National Federation of Tobacco Growers (FEDETABACO)



Tobacco growers are more than a fundamental part of the value chain; This is how the Tobacco Industry and the other links in the chain must understand it; without committed, efficient and effective growers, the rest of the links will not function well. It is here where ITGA has played and continues to play a transcendental role throughout the history of the Guild and the entire value chain, which is to keep its members up to date on production trends, consumption, uses, markets, sector difficulties, challenges and opportunities, among many other topics, which allows growers in any country to make the most appropri-

ate and timely decisions for the good of the entire chain; Therefore, as a member of the ITGA, every time I have the opportunity to participate in its meetings, I am surprised by the rigorous and committed work done by ITGA and its associates in terms of information, for which, on behalf of the tobacco growers of Colombia, I am highly grateful. Despite the difficulties we are facing today in the tobacco sector, especially due to the application of the Framework Agreement on Tobacco Control, we will have tobacco for many years ahead, and that is where ITGA contin-

ues to play a very important role, not lowering its guard, on the contrary, reinforcing together with its associates and allies the successful actions that it has developed throughout its history for the good of the entire value chain, but also, exploring new paths, especially to support those communities that require complementary actions to tobacco cultivation, in the same way, we have to successfully face the challenge that humanity has, climate change, to which we have to adapt by implementing actions and strategies for the short and medium term. <sup>16</sup>

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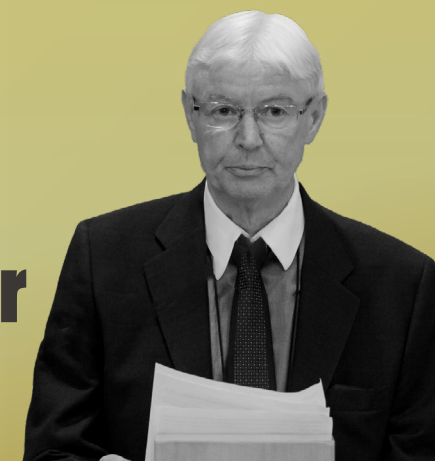
(51) 3715-7989



EDITORIA GAZETA

## Benicio Albano Werner

ITGA President 2018



### What was ITGA like when you were the President?

Our organization was founded in 1984, with management clearly defined in its statutes. Each administration has faced different and new issues, which, with the collaboration of the ITGA team, have been successfully resolved. In February 2006, president Harry Vergeer stepped down, and the vice-presidency was held by Brazil's Hainsi Gralow. However, with the death of Mr. Gralow on March 1 of the same year, I was invited by the Chief Executive and fellow ITGA members to take over the presidency on an interim basis until the Assembly, scheduled for October 2006. In the elections held on October 24 of that year, I was elected president, and Mr. Rogerio Quarles, from the United States, was elected vice-president.

### Can you share the best memories from your ITGA presidency?

I don't have a specific memory, but the participation of the delegations of the associated countries in the assemblies and the constant support of the ITGA secretariat in the tasks that fell to me are happy memories that accompanied me during my time as president.

### What were the main challenges during your tenure at the association?

The challenges were imposed by the requirements set out in the FCTC document, which caused concern throughout the tobacco production chain. In particular, the lack of access to discussions and the exclusion of our arguments about the importance of production. As growers, we are fundamental to the sector, as are the people who work in cigarette factories and in tobacco processing. In short, the WHO's FCTC functions as a veritable dictatorship, as it offers no opportunity for the parties involved, who generate wealth and taxes for governments.

### What were the achievements you are most proud of?

The Assembly I chaired in Verona, Italy, in

**“** *I am privileged to have known all the presidents and to have followed the management of each one of them, with their difficulties, but also with great achievements, which have allowed our organization to reach the present day.*

2006, was attended by the world's largest tobacco growers, including countries such as China, Brazil, India, the United States, Argentina, as well as all the founding countries, with the exception of Canada.

### How has the organisation changed during the years?

Without having a fixed ITGA site, the ZTA absorbed all the administrative costs, including the secretariat, which was coordinated by Mr. Bert Barnard, the creator of the initiative, who also visited the six founding countries

### In your opinion, what is the value of ITGA in the global tobacco sector context?

For four decades, ITGA has been a vital voice for tobacco growers, promoting dialogue, international cooperation and the development of innovative solutions to the challenges facing the sector. Its trajectory is a reflection of hard work, commitment to quality and the well-being of farming communities, and the preservation of an economic sector

### How do you see the future of tobacco growing from your current standpoint?

Although the intense anti-smoking campaigns have contributed to a reduction in cigarette consumption and consequently affected tobacco growers' production, I believe that the drop observed from the start of these campaigns to the present time tends to be less significant. This is due to the fact that, in addition to the consumption of traditional cigarettes, there is an increase in the use of new nicotine products, especially heated tobacco products, which, in my opinion, continue to contribute to tobacco production.

### Many of the former ITGA Presidents are being interviewed for the current edition of Tobacco Courier. Do you want to send them a message?

I am privileged to have known all the presidents and to have followed the management of each one of them, with their difficulties, but also with great achievements, which have allowed our organization to reach the present day. I would like to congratulate and thank them for all their efforts on behalf of our ITGA.

### Please share your final words with our readers.

The creation of the ITGA was the great inspiration of Mr. Bert Barnard, with the support of the board of the Zimbabwe Tobacco Association (ZTA). ITGA plays an essential role in the global defense of tobacco growers. Without his leadership and the involvement of his team, the WHO Framework Convention on Tobacco Control (FCTC) would have gone down an even more damaging path for the tobacco supply chain.



ITGA 2024 Americas Regional Meeting, Santa cruz do Sul, Brasil



# USA Country Report



## ITGA 2024 ANNUAL GENERAL (AGM) IN RALEIGH, USA

ITGA's 2024 AGM in the US included a discussion panel focused on US growers' issues. The group debated ITGA's tobacco yields and productivity research shared in the previous edition of the Tobacco Courier. A panel consisting of local growers, moderated by Dr William Snell from the University of Kentucky, that combined many generations worth of tobacco growing experience, highlighted that the issues faced by growers across the world a very similar. Panellists discussed in length the consequences of the of the so-called US Tobacco Buyout Program which led to concentration of bigger farms and shift of production to the west of the country but failed to deliver yield improvements.

Despite the consistent hardships, the President of TGANC Matt Grissom summarised the general thought of tobacco farmers: "We grow and will continue to grow tobacco because we love to do it." which became the headline of the 2024 World Tobacco Growers' Day Celebrations.

### 2024 SEASON ESTIMATES

In the US, the tobacco area for harvest in 2024 is expected to total 163,900 acres, down 5% from 2023 for comparable States, according to the United States Department of Agriculture. Note, the agency has recently eliminated several producing States from its surveys. If realized, this will be the lowest tobacco harvested area on record. Compared with last year, harvested acreage is expected to be down in three of the four major tobacco-producing States. FCV, at 126,000 acres, is up slightly from 2023 for comparable States and accounts for 77% of this year's total tobacco expected harvested acreage. The light air-cured burley type tobacco area, at 25,000 acres, is down 17% from 2023 for comparable States. Fire-cured tobacco, at 8,800 acres, is down 23% from 2023 for comparable States. Dark air-cured tobacco, at 4,100 acres, is down 13% from last year.

Nevertheless, leading leaf dealers forecast volume growth for both FCV and Burley tobacco. Both estimations were done before the Tropical Storm Debby hit the main tobacco growing states. 🌪️

TABLE: TOBACCO PRODUCTION IN USA

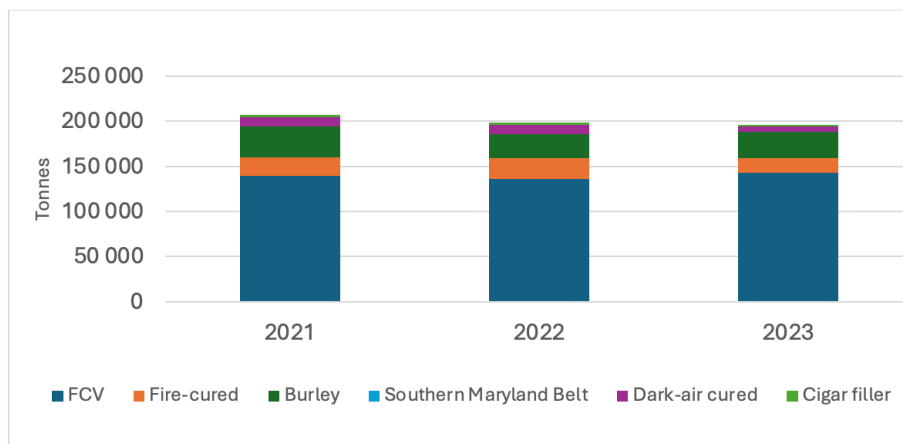
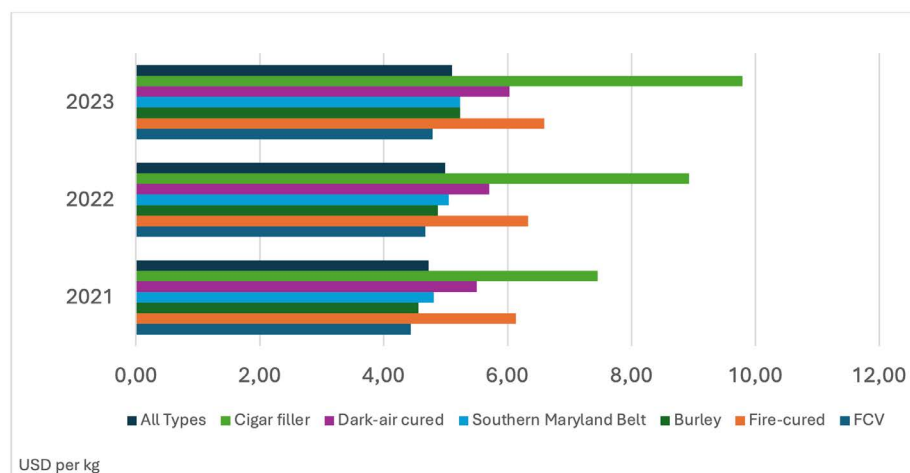


TABLE: TOBACCO PRICING IN USA



ITGA 2024 Annual General Meeting, North Carolina, USA

## Daniel Green

ITGA President 2016-2018



**Author Name:** Daniel Green

**Work Title:** BSC CEO

**Please discuss your observations and key takeaways from the most recent crop (2022)?**

The 2022 USA flue cured crop totalled 56,615 hectares with total production of 137,260 metric tons. Burley farmers harvested 13,116 hectares for production of 26,580 metric tons.

**What are the main challenges for growers in your market?** (e.g. economic, social, environmental and other issues)  
Growers are facing significant challenges hiring affordable labor for producing tobacco. The high cost of growing tobacco is discouraging many farmers from growing as interest rates have risen substantially over the past year.

**What is the level of support for growers from the local authorities, if any?**

As tobacco production has concentrat-

ed into smaller geographic areas over the past few years, growers still receive strong support from local authorities. However, support at the federal level is waning as the number of tobacco growers continue to decline.

**What are the most notable changes taking place in the supply chain at the moment?**

Tobacco growers are switching to alternative crops that require less labor and have lower input costs, but still offer good profitability. Many farmers have expanded production of grain crops and cattle production.

**Where do you see the biggest opportunities? What are your priorities for the year?**

General farm profitability has improved over the past year with growers finding good opportunities to replace tobacco production. Tobacco growers wishing to increase production of tobacco are

finding plenty of buyers, but growers are generally disappointed with pricing compared to opportunities with other crops.

**What is your expectation for the incoming crop (2023)?**

USA flue cured production is expected to decline by 5% in 2023 and burley is expected to remain unchanged. Prices have only increased enough to cover additional costs of production. Supply shortages are expected to continue at least through 2024, with more extreme shortages in burley supply than flue cured.

**How do you see the long-term prospects for tobacco growers in your market?**

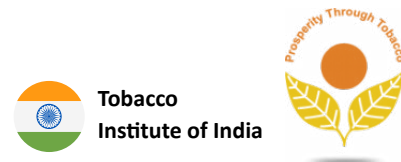
USA tobacco growers expect to benefit from a slowly decreasing, but reliable demand for tobacco domestically. Export opportunities are expected to decline more rapidly as USA becomes more expensive. 🌐



Mr. Daniel Green with India and Misiones Delegations, ITGA 2024 AGM, North Carolina, USA



# India Country Report



## IMPORTANCE OF TOBACCO

India is the world's 2nd largest tobacco producer and a leading exporter. The crop has a huge socio-economic contribution, it provides 45.7 million with livelihoods. The entire tobacco sector in India contributes an estimated USD 200 billion to the country's economy. However, the structure of local consumption is unique. 91% of tobacco is consumed in 29 different forms like Bidis, Chewing, Khaini, Hookah, Snuff and others, including illicit cigarettes. Only 9% of Tobacco is consumed in Legal Cigarette form in India.

## LEAF SALES DEVELOPMENTS AND WEATHER IMPACT

Since 2020, FCV exports in volume terms increased by 36% with very high unit value realisation. Nevertheless, like in other tobacco growing countries, erratic and unfavourable weather events – cyclones, hailstorms and heavy rains impacted Indian FCV crop on multiple occasions.

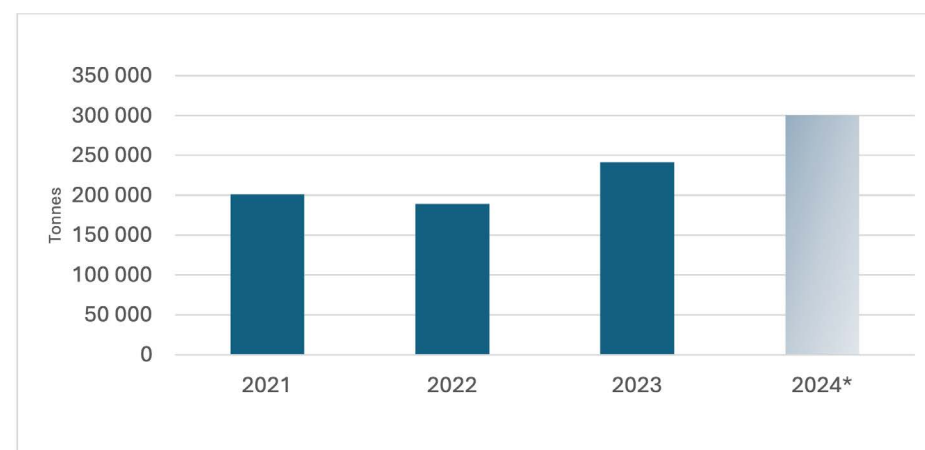
Karnataka FCV crop production in the past 3 years was much lower than the government authorised crop size (-29 million kg in 2021, -40 million kg in 2022 and -11 million kg in 2023). FCV crop production in Andhra Pradesh was also lower in 2022 (-9 million kg). Farmers in Andhra went for replantation post crop damage due to cyclones in recent years – led to higher crop production vs. authorized crop (2023 +41 million kg and 2024 +73 million kg).

## GROWERS' RESILIENCE

With this in mind, FCV tobacco farmers showed impeccable resilience in the face of recurrent adverse weather conditions. Assured of demand for their produce, farmers replanted crop even though it meant an increase in input costs, including fertilizer, fuel, labour and others.

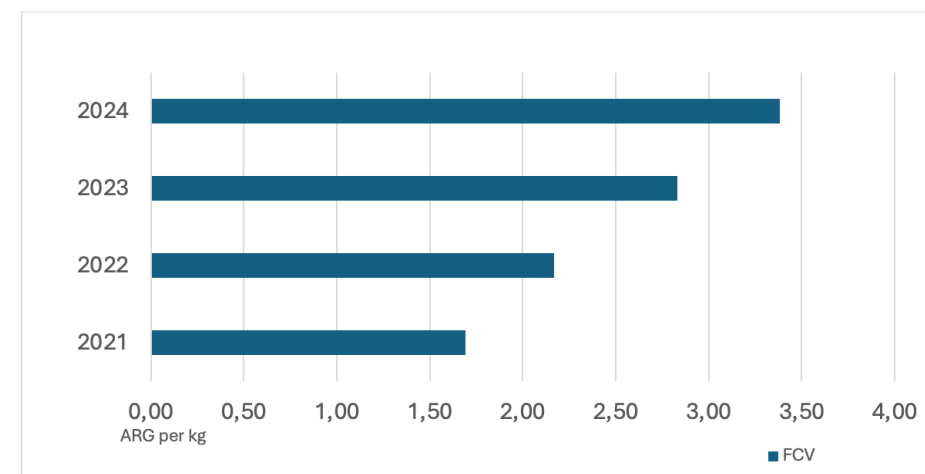
Higher crop production with better prices enabled farmers to realize better income. Tobacco is a highly remunerative crop – cultivation of alternative crops, like chilli, led to earnings losses. 📉

TABLE: FCV TOBACCO PRODUCTION IN INDIA



\*FCV preliminary data

TABLE: FCV PRICING IN INDIA



India Delegation, ITGA 2024 Annual General Meeting, North Carolina, USA

# Bulgaria Country Report



## SEASON HIGHLIGHTS

The 2024 crop is nearly 70% harvested, with tobacco sales expected to begin in November and December and be 100% completed by January and February 2025.

Tobacco producers are enjoying a good harvest this year, but on the eve of the new buyout campaign they are expecting the holding of a Tobacco Advisory Council, which will address the industry's current problems. For the second consecutive year, due to the dry summer, the quality of the tobacco harvest in Bulgaria is excellent, at the expense of the quantity, which is reduced.

"The quality is a result, apart from the dry weather, of the good agricultural practices and the high professionalism of the Bulgarian tobacco producers" – Tsvetan Filev, chairman of the National Association of Tobacco Producers – NAT2010 and President of the two branch European organizations ELTI and UNITAB.

## GOVERNMENT SUPPORT

NAT2010 will request that the maximum budget allowed by the European Commission for Campaign 2024 on direct payments for intervention "Transitional national supplement for tobacco", which is in the amount of BGN 70.8 million (USD 39 million) in order to be able to cover the costs of all 7,967 registered tobacco producers in the country. The yields per hectare in the dry and full of climatic deviations of 2024 are much lower than last year. 📉

TABLE: TOBACCO PRODUCTION IN BULGARIA

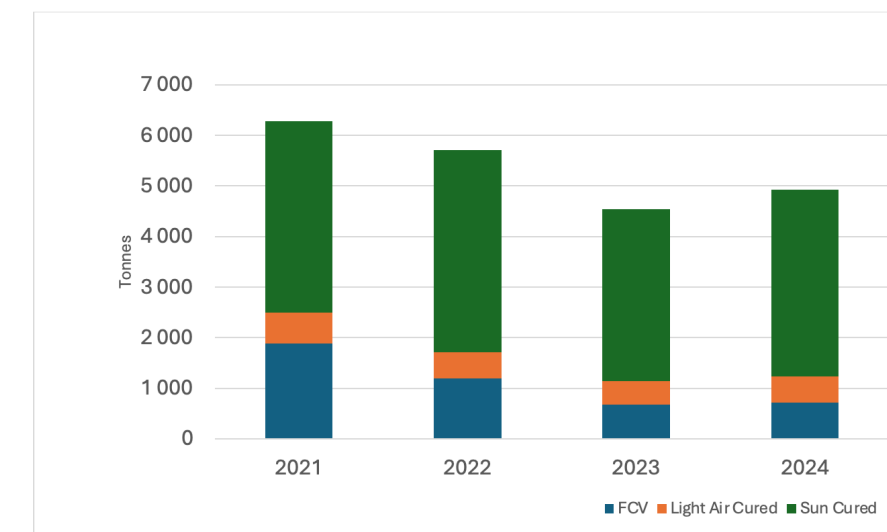
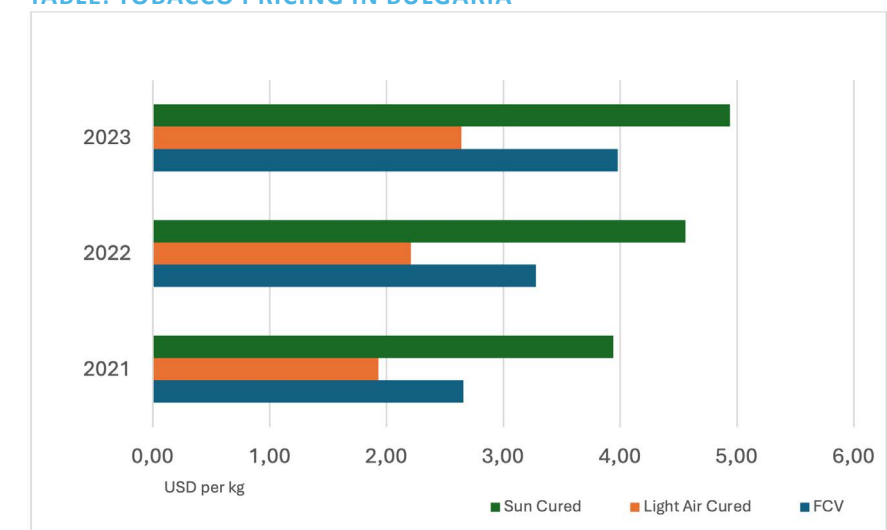


TABLE: TOBACCO PRICING IN BULGARIA



Ms. Anna Mircheva, Mr. Reuben Maigwa, Mr. Tsvetan Filev and Mr. José Aranda, ITGA 2022 Annual General Meeting, C. Branco, Portugal



# ITGA 40<sup>th</sup> Anniversary Spotlight Interview: UNITAB

Przemyslaw Noworyta,  
General Secretary  
UNITAB



**What is the importance of ITGA in the overall tobacco supply chain?**

40 years of ITGA history only confirms the great importance of this organization. For many decades, ITGA has been uniting tobacco growers around the world. Currently, when tobacco farmers are under enormous pressure, ITGA indicates them to be proud of their profession. Through information and coordination of activities at national levels, and emphasizing the importance of tobacco cultivation in the world, ITGA is an important factor in stabilizing tobacco production.

**Can you please share a moment during ITGA's meetings you took part in that made a lasting impression?**

There were many such moments, but one in particular stayed with me. While at the ITGA AGM in Tanzania in 2023, there was a large group of members of national tobacco association and growers from the organizers' country in the conference room. In their statements, they were full of passion, faith in the future of tobacco cultivation in Tanzania and they noticed the government's commitment to double

**“** *Is in the activities of this organization, in uniting tobacco growers (including cooperation with UNITAB) and in opposing the ideological and discriminatory approach of some public institutions, that allow us to look into the future with optimism.*

tobacco production in their country. Finally, they showed their full trust in ITGA as an organization fully supporting those aspirations. It is such an excellent example of the ITGA's power.

**How do you see the future of tobacco growers in the new industry realities and what is the role of ITGA in this context?**

This is a difficult question, especially in its first part. If I didn't see a future for tobacco cultivation, I would probably change my job. Yes, of course, there is a future for the millions of tobacco farmers around the world. This issue is slightly different in the EU, where there is huge negative pressure on tobacco. Restrictive anti-tobacco regulations and economic conditions, make it more difficult to talk about our future than, for example, in Asia or Africa. But the good news is that we are still dealing with a stable market for demand for raw tobacco, and new, innovative tobacco-based products are being created, which, being less harmful alternative to traditional tobacco products, are our future. ITGA has a huge role to play. It is in the activities of this organization, in uniting tobacco growers (including cooperation with UNITAB) and in opposing the ideological and discriminatory approach of some public institutions, that allow us to look into the future with optimism. 📺



Mr. Przemyslaw Noworyta as a panelist in ITGA 2023 Annual General Meeting, Dar es Salam, Tanzania

# ITGA 40<sup>th</sup> Anniversary Spotlight Interview: Bulgaria

Tsvetan Filev  
Chairman of NAT-2010, President  
of UNITAB Europe, President of ELTI



**What is the importance of ITGA in the overall tobacco supply chain?**

Globally, ITGA represents and protects the rights and interests of tobacco growers in its Member States - administratively and legislatively. Particularly important is the contribution to communication at institutional level. ITGA is the face of millions of tobacco farmers on five continents in the sector's struggle against the restrictions of the World Health Organization's (WHO) Framework Convention on Tobacco Control (FCTC).

**Can you please share a moment during ITGA's meetings you took part in that made a lasting impression?**

Professionally, all the forums and meetings organised by ITGA that I have participated in (and there are many), I have lasting impressions as if they happened yesterday - AGM 2013 (Indonesia), 2014 (Portugal), 2015 (Spain), 2016 (India), 2017 (Greece), 2019 (Dominican Republic), 2022 (Portugal), to the Oriental Tobacco Forums 2012 (Macedonia), 2013



Mr. Tsvetan Filev, ITGA 2014 Oriental Tobacco Forum, Plovdiv, Bulgaria

(Greece), 2014 (Bulgaria), 2015 (Greece), to the initiatives related to COP-6 (Moscow), COP-7 (New Delhi), COP-8 (Geneva), COP-9 (The Hague), COP-10 (Panama). But still, if I have to choose just one moment of particular significance, it is the protest of the ITGA member states in front of the 2016 World Health Organization (WHO) Conference in New Delhi

(India). That was when I firmly believed in the ITGA 'cause'.

And on a personal level, both subconsciously and consciously, I have always respected, and now highly appreciate, the absolute dedication of two of my true friends as people and professionals - Antonio Abrunhosa and Mercedes Vazquez.



Mr. Tsvetan Filev and Ms. Mercedes Vázquez, ITGA 2014 Oriental Tobacco Forum, Plovdiv, Bulgaria

**How do you see the future of tobacco growers in the new industry realities and what is the role of ITGA in this context?**

Personally, I wish that despite the constant and continuous difficulties such as production, sales, profitability, regulations, restrictions and many others, tobacco growers all over the world would work and live in normal conditions and a high standard of living. Whether this is achievable, I do not know. But I see the role of the ITGA, more organized, larger, with the same strength and energy to continue to defend for the good future of our difficult branch, as we have united and together - Asia, Africa, Europe, North and South America. 📺



# François Van Der Merwe

*ITGA President 2012-2016*



Various positions of responsibility. Current: Senior consultant in the tobacco industry in an advisory capacity.

## What was ITGA like when you were the President?

I was President of ITGA for two terms or 4 years, which is unusual. But the ITGA during that time was very active in defending not only growers but also the sector value chain. The members were participating well and there was a good spirit of camaraderie between the secretariat and the members.

## Can you share the best memories from your ITGA presidency?

During my time I tried to improve the team spirit within the ITGA. This was between the secretariat, the different regions and the members. I visited the office so I could see first-hand how the business was run, and I could report first hand to the members that their organisation was in good hands, it was well managed, and governance relating to finances and other administrative issues were satisfactory. Being an organisation funded by its members and supporter members, I tried to ensure that funds were well spent and could always deliver a return on investment made by the funders. I also visited different regions to try and further the culture of working together, listening to the problems in all regions and try and build those into our work plans.

## What were the main challenges during your tenure at the association?

At my time as President, the FCTC was fiercely and aggressively driven by the WHO and the NGO's. We focussed all our energy and efforts to defend the rights of the growers and their clients, and also we tried to expose the ridiculous so called "science" which was used to develop draconian measures to try and damage our sector.

## What were the achievements you are most proud of?

I think the ITGA played a major role in defeating or at least slowing down the tempo

at which the FCTC was trying to impose draconian measures through the COP's and onto Governments to develop legislation in their countries which could damage the farmers and also their clients.

During my tenure I also tried to emphasise the importance of balancing supply and demand world-wide. I always believed, and I still do today, that this is the most powerful way to ensure good and competitive prices for farmers. I also worked hard and made proposals to the membership at the time to consider a new and different funding model for ITGA, in order to be more independent and not so heavily dependent on supporter members.

## How has the organisation changed during the years?

I have been out of ITGA for some years now, so I cannot really comment on how things have changed over the past 5 years or so. However, there has been a change in ITGA CEO and also some new people coming into ITGA. From what I read and gather from a distance, and also because I have known the current CEO since she started at ITGA for the first time, I still get the impression that ITGA is very much alive, vibrant, energetic and well. I am not sure if the supporter members are still around, as this was always very critical for the work of the ITGA. I surely trust that this is still the case. But because I know the CEO and I have witnessed her development and fantastic progress over the years, I have no doubt that under her guidance and energy the ITGA will further evolve and adapt to ever changing circumstances.

## In your opinion, what is the value of ITGA in the global tobacco sector context?

ITGA has always been and still is the only global place where growers and supporter members can form a collective voice, develop strategies jointly, join forces, and align on positions and how to successfully defend the future of the sector.

## How do you see the future of tobacco growing from your current standpoint?

Even with the onslaught on the sector from

the WHO FCTC and the growth of new generation products which use less tobacco than traditional products, my view is that tobacco production will still be relevant for many years to come. Transition to new products will take a very long time while at the same time, traditional products using flue-cured, burley and air cured tobaccos will still be important and relevant for many years to come. However, farmers the world over must realise that in order to maintain competitive prices, they need to ensure that supply and demand is in balance. Over supply will always lead to lower prices and this is not what farmers want, so farmers through the ITGA in my view need to ensure that supply and demand is as closely matched as possible.

## Many of the former ITGA Presidents are being interviewed for the current edition of Tobacco Courier. Do you want to send them a message?

To serve as President of ITGA, in my view, was always a great honour and a humbling experience. To be asked by farmers all over the world to hold this position, is very special indeed. However, I also want to thank all those who have served and are still serving in this and other non-executive positions of ITGA. It is a non-paid position, with huge responsibility and takes time if one tries to do a good and proper job, which hopefully I have achieved to do. Thanks to all and keep going on this important journey which is so critical for so many thousands of people whose livelihoods depend on working in the tobacco sector.

## Please share your final words with our readers.

ITGA is a collective. Together as a collective will always be stronger than any individual efforts. This means people who make their living from the same commodity, come together to identify the threats, develop strategies to overcome those threats, and entrust a capable and dedicated CEO and secretariat to implement the strategies on behalf of the members. May ITGA go from strength to strength and also enjoy the time when members can get together to work, share stories and have some fun!!

# ITGA's History in Photos



ITGA Foundation Working Table, 1984



ITGA Foundation, Canada, 1984



ITGA Executive Committee, United Kingdom, 1988



ITGA AGM, United Kingdom, 1998



ITGA AGM, Brazil, 2000





ITGA AGM, Malawi, 2001



ITGA AGM, Portugal, 2002



ITGA AGM, Dominican Republic, 2007



ITGA AGM, India, 2009



ITGA AGM, China, 2005



ITGA AGM, Canada, 2004



ITGA AGM, USA, 2010



ITGA AGM, Argentina, 2008



ITGA AGM, Italy, 2006



ITGA COP4 Campaign, Uruguay, 2010





ITGA COP4 Campaign, Uruguay, 2010



ITGA COP4 Campaign, Uruguay, 2010



ITGA COP4 Campaign, Uruguay, 2010



ITGA COP4 Campaign, Uruguay, 2010



ITGA AGM, Tanzania, 2011



ITGA AGM, Argentina, 2012



ITGA AGM, Indonesia, 2013



ITGA AGM, Portugal, 2014





ITGA AGM, Spain, 2015



ITGA AGM, Portugal, 2022



ITGA AGM, India, 2016



ITGA AGM, Greece, 2017



ITGA AGM, Tanzania, 2023



ITGA Oriental Meeting, Türkiye, 2019



ITGA AGM, USA, 2024





**itga@tobaccoleaf.org**  
**www.tobaccoleaf.org**

