



Star Agritech International Crop Report



Zimbabwe

The Zimbabwe FCV crop size is anticipated at 265 million Kgs in 2023 which is around 15% more than the previous year. The average price on the auction floors is USD 3.05. The quality of the crop is much better than the last year which increased the average prices in the market.

The crop has more good quality lemon-style Tobacco which may increase the demand from China.

Malawi

The Malawi Burley crop size is anticipated at 110 million Kgs in 2023 which was 70 million kgs in 2022. The average green price is USD 1.95 per kg which was USD 2.03 the previous year. Tobacco farmers in Malawi earned relatively good money last year due to the global Burley shortage. This is the main reason behind the increase in the Crop size this year.

The 2023 FCV crop size is estimated at 15 million kgs which is almost the same as last year. The average green price is USD 2.79 per kg.

Brazil

The 2023 Brazil FCV crop size is estimated at 560 million kilos which is around 10% more than the previous year. The quality of the Tobacco can be defined as average to good with a predominance of light orange to orange color in the lower stalks and orange to full orange in the upper stalks. The crop has a low percentage of mahogany style. There remains very little uncommitted stock available. The average green Tobacco price to the farmers is around USD 3.35.

The 2023 Burley crop size was calculated at 41 million kilos which is the same as the previous year.

Argentina

The FCV crop size is calculated as 60 million kilos in Argentina. 32 million Kgs have been produced in Salta and 28 million kilos have been produced in Jujuy. There was a loss of around 8 million kgs in Argentina due to the hail storms, plus the lack of labor power during the harvesting season when normally labors come from Bolivia but due to the over 100% devaluation on the Argentinian Peso in the last one year, coming to Argentina for work is no longer financially beneficial for the Bolivian labors. The price of green B1F increased to 634 Pesos which makes USD 3.09 as per the official rate.

The Argentina Burley crop size has reached 40 million Kgs. 35 million kgs have been produced in Misiones and 5 million kgs have been produced in Tucuman. Almost 20 million kilos have been purchased from the farmers by the Brazilian companies and shipped to Brazil to be processed. The green price is around 600 Pesos. The quality of Misiones Burley is good due to sufficient rainfalls during the growing seasons and as per its characteristics, Misiones Burley is much more masculine compared to Tucuman Burley.

U.S.A

The 2023 USA FCV crop size is expected to be around 140 million kilos. The prices have not been decided yet but the average green price is expected to be around USD 4.60. Since the USA FCV demand from China has decreased significantly, the price of green Tobacco is not sufficient for US farmers.

The growers are facing significant challenges in hiring affordable labor for producing Tobacco. The Tobacco growers are switching to alternative crops that require less labor and have lower input costs. Many farmers have expanded the production of grains crops and cattle production.

The USA Burley crop size is estimated at 30 million kilos in 2023 which was 25 million kilos in 2022. The average green price is expected to be around USD 5.30 which represents a 10% increase compared to last year.

China

The 2023 FCV Crop size is calculated as 1934 million kilos which represents a 5% increase compared to last year. The quality of upper and low stalk positions is lower than the previous year due to the excess rainfall during the growing season. China is increasing its crop size by 5% every year for the last 4 years. The export quota has been decided as 111 million kilos for 2023.

The 2023 Burley Crop size is expected to be around 10 million kilos which 8 million kilos in 2022.

Bangladesh

The 2023 Burley crop size is projected to be around 28 million kilos. The average green price is USD 2.20. The crop quality is average to good. Almost half of the crop is contracted by the multinationals. Due to the global Burley shortage, demand for Bangladesh Burly is significantly high and it caused an increase in the price.

The 2023 FCV crop size is calculated at 85 million Kgs which is almost the same as the previous year. Approximately, 75% of the crop has been contracted by the multinationals. The average green Tobacco price is USD 2.10. The quality of the crop can be defined as fair to good quality.

India

Traditional FCV crop size is calculated as 79 million kilos in 2023 which is 20% less than the expectation. The extrema weather conditions are the main reason behind this loss. The average green Tobacco price increased to USD 2.40. The quality of Tobacco can be defined as average, thin to medium bodied.

The Mysore FCV crop size is calculated as 60 million kilos in 2023 which were projected as 100 million kilos at the beginning of the season. The crop shortage increased the average green Tobacco price to USD 2.81.

The NLS 2023 crop size is projected to be around 55 million kilos which represents a 10% increase compared to the previous year. The average green price is USD 2.40.

The Vinikonda Burley crop size is projected to be around 49 million kilos in 2023 which represents a 55% increase compared to the previous year. Even though the quantity increased significantly in 2023, green Tobacco prices also increased to USD 1.40 from USD 1.28 due the inflation and the global Burley shortage. Overall, the quality of the Tobacco can be classified as average to good.

The HDBRG Burley crop size is estimated as 35 million kilos in 2023 which means a 25% increase compared to the previous year. The average green tobacco price is USD 1.26

Tanzania

Tanzanian FCV crop size is projected to be around 135 million kilos in 2023 which was 62 million kilos in 2022. The new players in the market who are providing better support to the farmers are the main reasons behind this significant increase in crop size. The average green Tobacco price is expected to be around USD 2.15. All the crop has been harvested and cured, the purchases still continue in all the regions.

Indonesia

The FCV Lombok crop size is estimated as 41 million kilos which are planted in 34,000 ha, the average yield is 1.2 tons per hectare. Production is down by 7% compared to the previous year.

The Bojonegoro crop size is projected to be around 13 million kilos in 2023.

The production of Jatim-type Tobacco is anticipated to reach 115 million kilos in 2023 which represents a 15% increase compared to last year. This number includes Jatim VO, Kasturi, Rajangan, Paiton, Madura, Krosok, and Plose types of Tobacco.

The Tobacco production in Java is expected to be around 52 million kilos in 2023, planted area is 54,835 ha which is almost same as the last year. This number includes Tembaku Asepan (DFC), Temanggung, Janturan, and Garanga.



Oriental

Turkey

Turkish Oriental Tobacco production has been calculated as 65 million kilos in 2022. The average green price was around EUR 3.80/kg. The price is expected to increase for the 2023 crop.

Against the common opinion, the earthquake which happened in the east part of Turkiye in February has not much affected Tobacco production. Since the city centers were mainly affected by the earthquake, people who lives in cities moved to villages where Tobacco farming is the main income. Therefore, Tobacco production in the East part of Turkiye may go up next year.

Regarding the 2023 crop, the transplantation started late due to the heavy rains. Overall, 95% of transplanting has been completed. The expected crop size is 72 million kilos.

Greece

Greek Oriental Tobacco production has been calculated as 9 million kilos in 2022. The average green price was around EUR 5.10 per kilo.

Regarding the 2023 crop, the price is expected to increase by 5-10%. The transplantation started late, towards the end of May due to rainy weather conditions. The 2023 crop size is estimated at around 7 million kilos.

Bulgaria

Bulgarian Oriental Tobacco production has been estimated at around 3 million Kgs in 2022 which is lower than the previous year.

North Macedonia

North Macedonian Oriental Tobacco production has been calculated as 21.5 million kilos in 2022. The weather progressed as desired and there was no delay in transplantation. The average green price was around EUR 3.80/kg.