



TOBACCO BOARD OF ZAMBIA



2021 MARKETING BRIEF REPORT

1.0 2021 Tobacco Marketing Season in review



The tobacco marketing season for 2021 commenced on 26th February, 2021.

The early opening of the tobacco marketing season was necessitated by the effects of COVID -19 to ensure that the set health protocols were strictly adhered to by all stakeholders.

There were no official cases of COVID -19 cases recorded during the 2021 marketing season at all sales floors

Despite the early commencement of sales, the marketing season was officially opened on 28th April, 2021, the event was graced by the Permanent Secretary- Ministry of Agriculture.





Grower numbers increased from 17,521 in 2020 to 20,073 growers recorded in 2021, this represented 12% increase in the number of growers that produced tobacco in the year review.

The total hectares of all tobacco types produced in 2021 was 23,198.40 Ha, representing an increase of 20% compared to 2020 season when 18,349.63 hectares of all tobacco types was grown.

The year under review also recorded an increased average yield/hectare compared to 2020 season, the yield per hectare in 2021 was 1955.71Kg/ha compared to 1662.87Kg/ha recorded in 2020.

The total production in 2021 was 36,884, 656.00 kgs compared to 30,513,099.00 Kg recorded in 2020 giving 6% increase in total tobacco production.

2.0 2021 Licensed Tobacco Buyers



Tobacco Buyer	Name of Sales Floor	Area of Operation	Tobacco type licensed to purchase
Alliance One Zambia	Lusaka Main and Katanga	Lusaka	FCV
JTI Leaf Zambia	Baobab and Rosewood	Kaoma and Chipata	FCV and Burley
Tombwe Processing Limited	Tombwe and Lusaka Main	Lusaka	FCV
Pemba Leaf Tobacco Company	Chipata Main	Chipata	Burley
Gold N' Grain	Chipata Main	Chipata	FCV
Huamei Tobacco Limited	Huamei Tobacco Limited factory	Lusaka	FCV
Copper Leaf Tobacco Limited	Lusaka Main	Lusaka	FCV

3.0 2021 Licensed Tobacco Floor Managers



Tobacco Sales Floor Manager	Operated Sales Floor	Location of the Sales Floor
Tobacco Association of Zambia	Lusaka Main	Lusaka
JTILeaf Zambia	Baobab	Chipata
JTILeaf Zambia	Rosewood	Kaoma
Alliance One Zambia	Katanga	Lusaka
Tombwe Processing Limited	TPL Projects	Lusaka
Tobacco Board of Zambia	Chipata main	Chipata
Huamei Tobacco Limited	Huamei Tobacco Factory	Lusaka



4.0 Tobacco sales and production statistics

Sr/ N	Tobacco Type	Cumulative Mass (Kg)	Average Price/Kg (USD/Kg)	Total Value (USD)
1	Flue Cured Virginia	31,231,398.00	2.65	82,781,791.95
2	Air Cured Burley	5,653,258.00	1.64	9,278,600.47
	TOTAL	36,884,656.00		92,060,392.42



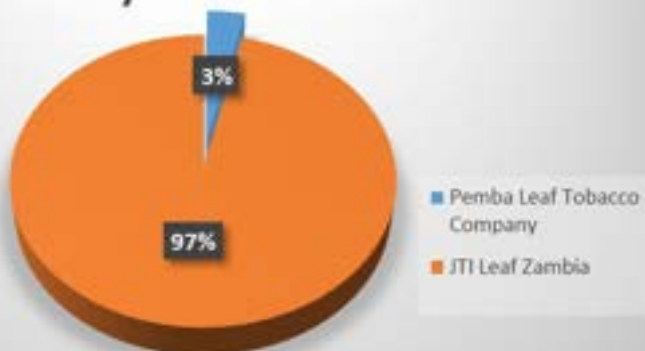
5.0 2020 vs 2021 Tobacco production

TOBACCO TYPE	2020 TOTAL TOBACCO PRODUCTION(Kg)	2020 TOTAL TOBACCO PRODUCTION (Kg)
Flue Cured Virginia	25, 691,965.00	31,231,398.00
Air Cured Burley	4,821,063.00	5,653,258.00
Total	30,513,099.00	36,884,656.00

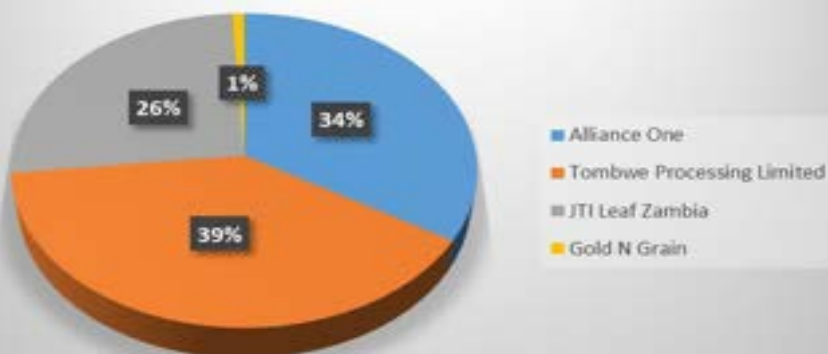
6.0 2021 tobacco type market share by buyer



Burley Market Share



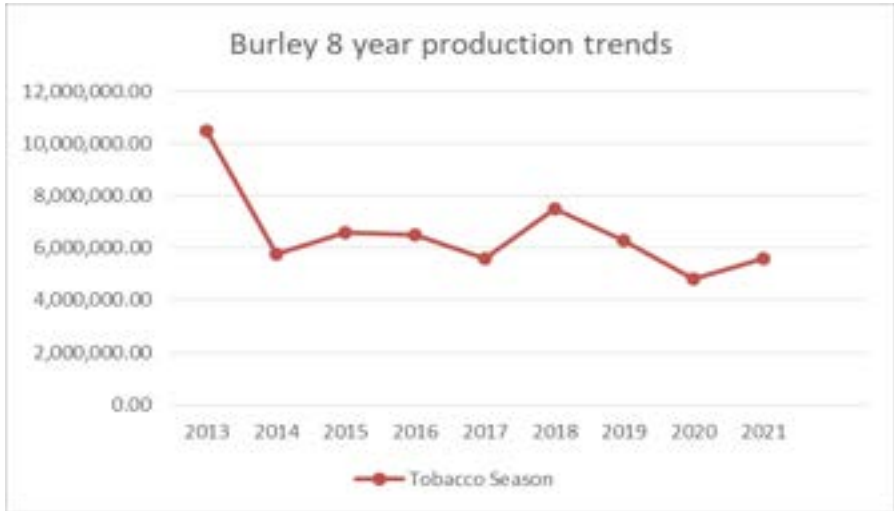
FCV Market Share



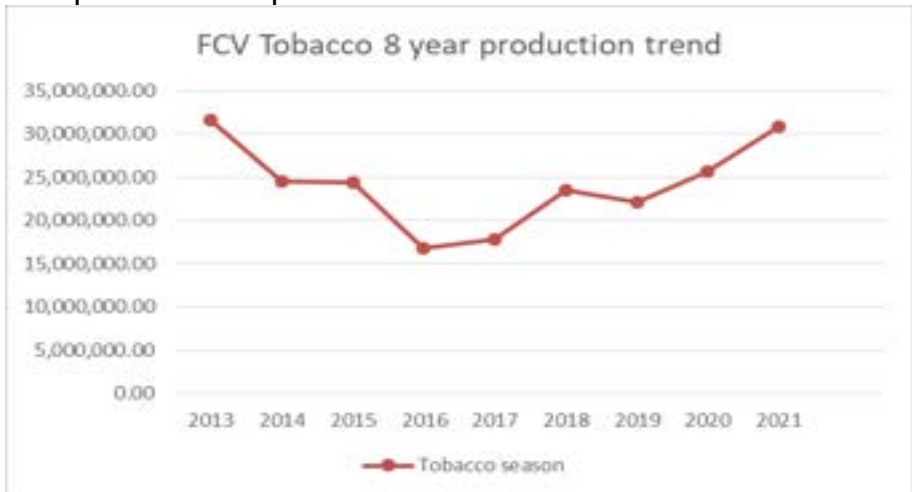
7.0 Eight (8) year tobacco production trends



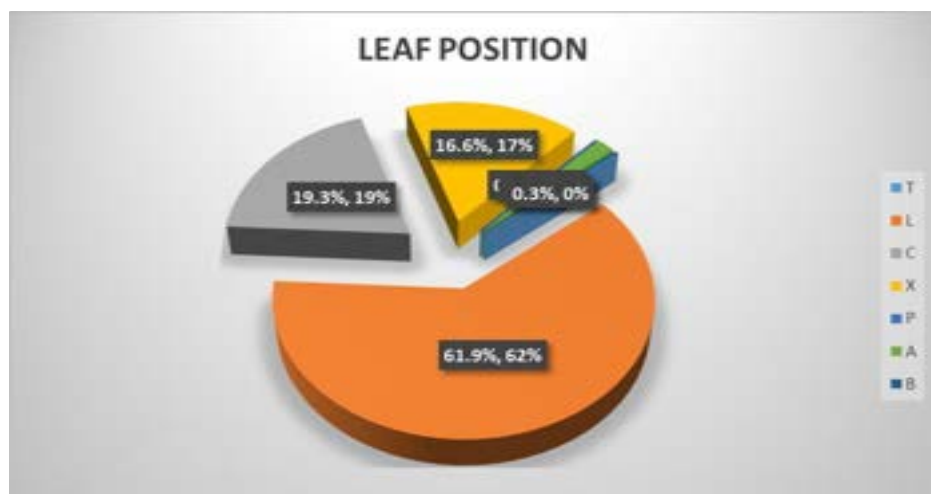
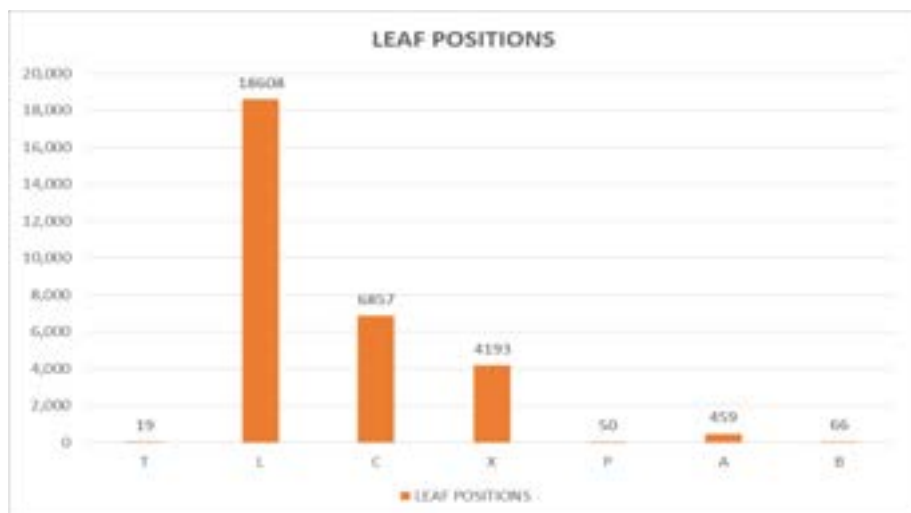
Burley production trends up to date



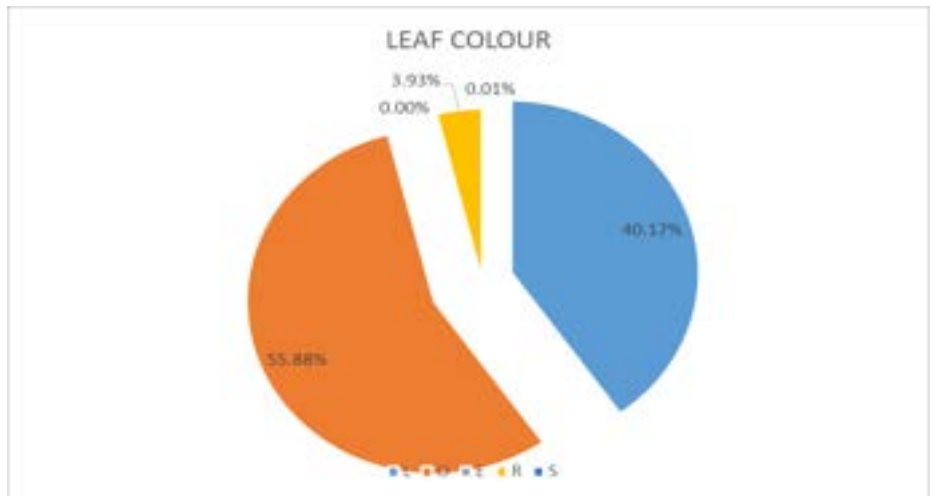
FCV production trends up to date



8.0 FCV 2021 Tobacco classification results



8.1 FCV Tobacco Classification results



8.2 FCV tobacco classification results



QUALITY SYMBOL	DEFINITION	APPEARANCE(A GE OF BLEMISH/TNJURY	USABILITY(% OF WASTE)
1	Choice	5%	0 %
2	Very Good	10%	5%
3	Good	30%	15%
4	Fair	50%	30%
5	Low	80%	60%
NG(No- Grade)	Poor	Over 80%	Over 60 %

8.3 Tobacco classification results



Leaf extra factors



Leaf extra factors description

Spot (A) - It occurs on the leaf as small brownish blotches with an off-white centre.

Scorched (Q) - Tobacco showing a noticeable degree of red colouring. Caused by raising barn temps before excess moisture is removed from the leaf

Greenish (V) - Any tobacco, which has a greenish tinge or cast and is referred to as 'running green' often along the midrib and veins. Usually disappear after further maturation.

Fixed Green (G) Any tobacco, which contains a 'hard set green' color on the leaf surface.

Guinea-fowl spot (Y) - Blemish showing speckling of small greenish-black to black spots commonly known as "weather spot". Mostly common in lower leaves (priming and lugs)

8.4 Tobacco classification cont'd.



Description of leaf styles

Leaf styles describes the resultant leaf texture caused by weather, curing and fertilization regime.

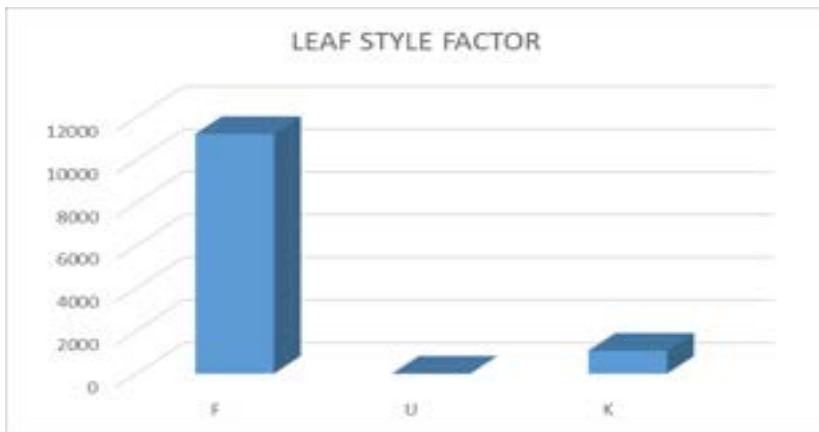
Ripe (F) - Tobacco in all groups which displays a superior degree of maturity- DESIRABLE

Close grained (K) – describes substandard, immature leaves which are close grained or have a closed cell structure- NOT DESIRABLE

Slatey (U)- Leaves are thick bodied, very close grained, slicky and pale in color-NOT DESIRABLE

Generally the crop was between F and K

Leaf styles description



8.5 Tobacco Classification results trends



YEAR/SEASON	GRADE SUMMARY	INTEPRETATION
2019	L3OFVA	<ul style="list-style-type: none"> - Predominantly leaf plant position - 3rd quality tobacco - Matured leaf - Running green in the leaf and ripe
2020	L1OFA	<ul style="list-style-type: none"> - Predominantly leaf plant position - First (1) quality - Matured and ripe leaf
2021	L1OFA	<ul style="list-style-type: none"> - Predominantly leaf plant position - First (1) quality - Matured and ripe leaf

The season witnessed improved FCV tobacco quality.

This can also be qualified by increased FCV tobacco average price/Kg which was recorded at USD 2.65/Kg compared to the 2019 tobacco season when the average price/kg was US\$ 2.24/Kg

9.0 Recommendations to Extension officers and Growers



The following recommendations are being made to the extension officers and tobacco growers regarding the production and presentation of tobacco,.

- I. Growers are advised to plant and use recommended seed tobacco varieties and should not plant or sow recycled seed.
- II. Particular attention should be observed at the time of curing tobacco, field officers are advised to conduct thorough grading and curing clinics during this critical period.
- III. Growers and all field officers to observe regulatory dates such as ; 15th May- stalk destruction, 31st December-destruction of all nursery sites remains, 31st October-end of grower registration
- IV. Growers advised to have enough barn and storage spaces.
- V. Tobacco booking procedures to be strictly followed by growers.

10.0 Key Achievements during the 2021 Marketing Season



The year under review witnessed an improvement in the tobacco quality and bale presentation from the growers, an indication of improved extension services being provided by the tobacco grower sponsors.

Tobacco production yields have increased by 5% compared to 2020 tobacco production season.

The season also witnessed an orderly tobacco marketing season with the strict adherence to the Marketing Rules and the COVID-19 protocols

One new tobacco buyer (Huamei Tobacco Limited) introduced in the industry and participated in the purchase of tobacco for the season.

Implemented the use of electronic tobacco movement permit which fostered smooth marketing processes.



11.0 Crop Marketing challenges - 2021

The following challenges were experienced during the 2021 tobacco marketing season:

Failure to observe booking procedures by some growers leading to congestion and tobacco presented for sale without buyer.

Poor Burley tobacco quality due to erratic rainfall patterns experienced in Eastern province where burley is predominantly grown.



12.0 Way forward

In order to improve on the marketing processes going forward, Tobacco Board of Zambia working together with industry stakeholders will embark on the following;

- I. Strengthening the grower registration system by ensuring that growers' fields that are registered are physically verified jointly with all industry stakeholders.
- II. In all tobacco production areas, field tobacco meetings and training are conducted at every tobacco production stage, so that Good Agriculture Practices are upheld, meetings will be conducted in collaboration with all industry stakeholders.
- III. Strengthening the tobacco marketing processes by integrating the tobacco registration system with the sales floor management systems
- IV. Growers and tobacco sponsors to engage in sustainable tobacco production programs, such as planting of trees and use of fuel- efficient tobacco curing facilities, so as to curtail effects of deforestation and harness the environment.
- V. Tobacco international classification to capture the burley grades



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