

**ITGA
AFRICA
REGIONAL
MEETING**
theme: Farm Productivity
26th to 28th June, Zambia

ITGA AFRICA REGIONAL MEETING 2024

LUSAKA, ZAMBIA



WELCOME NOTES

WELCOME TO THE ITGA AFRICA REGIONAL MEETING 2024

FROM JOSE ARANDA
(ITGA PRESIDENT)



Dear ITGA Members and Partners, Official Guests and Participants,

Welcome to ITGA's 2024 Africa Regional Meeting. This year, the event is taking place in Lusaka, Zambia, kindly hosted by the Tobacco Association of Zambia (TAZ). The sector in Zambia has done an incredible amount of work to position itself on the global tobacco leaf map. We are grateful to have them as part of the membership base and as a source of thoughtful ideas and advice.

We are living in difficult times. Rising economic pressures, devastating climatic events, and increasing regulatory pressure are putting the livelihoods of millions of tobacco growers at risk. Nevertheless, the resilience each of you is showing is worthy of a praise. We form the backbone of our communities and contribute for the wellbeing of rural communities.

As the global market continues to experience a significant shortage of leaf, we focus our attention on farm productivity. I am looking forward to our discussions and how we can better prepare ourselves for the future.

I am confident ITGA's 2024 Africa Regional Meeting will be an educational and highly beneficial event and I am looking forward to speaking with all of you in person.

Enjoy the meeting! Let's continue our tireless work to advance the interest of tobacco growers around the world.

WELCOME TO ZAMBIA

ZVHIKONYO MAHOMBE
(TAZ PRESIDENT)



Distinguished guests and invited delegates from the tobacco sector,

I am pleased to welcome you all to this important gathering. The tobacco sector as you all know plays a significant role in our countries' economies, at regional and global level, and I am delighted to see so many experts and stakeholders come together to share knowledge, ideas, and best practices. I trust that this regional meeting will provide a valuable platform for meaningful discussions, networking, and collaboration.

Let us work together to address the challenges and opportunities facing our industry, and to promote sustainable growth and development for the benefit of all.

Please do find time notwithstanding our busy program to relax and visit some of our entertainment places.

Welcome to Zambia and enjoy your stay!

HISTORY OF THE ITGA



Prior to 1984, tobacco growers worldwide had no unified voice. This changed on November 26th of that year when farmers from Argentina, Brazil, Canada, Malawi, the U.S.A. and Zimbabwe agreed to form an organisation to promote and develop their common interests throughout the world. From that agreement emerged the International Tobacco Growers' Association (ITGA).

Recognising the need to give their arguments a collective voice, national grower organisations from Argentina, Brazil, Canada, Malawi, USA and Zimbabwe proceeded to found the ITGA in 1984.

The founder members have been joined by 18 other countries in the Association's worldwide membership.

The ITGA is financed by dues paid by member organisations and determined by the Board after approval of the operative budget.

There are three levels of membership which are chosen by members on joining the ITGA according to their own requirements and budgetary restraints.

The ITGA is run by a Board of Directors, comprising those members whose categories of

membership entitle them to be Directors of the Association. It is administered by a Secretariat based in Portugal, whose Chief Executive reports to the Chairman of the Board.

The ITGA facilitates open exchange on technical matters but does not provide direct commercial advice or assistance. ITGA's charter specifically excludes its participation in any activities relating to the management or commercial policies of any of its member organisations.

The ITGA is an organisation for the largest and smallest grower organisations. All tobacco growers are faced with similar threats, regardless of the size of their production. The ITGA's strength is in providing a collective voice for growers. Its influence is directly related to the number of members it can represent.

The ITGA's long-term aim is to represent the world's 100-plus grower nations to provide a strong collective voice on an international and national scale to ensure the long-term security of tobacco markets.

For non growers associations type of membership please contact: itga@tobaccolleaf.org



THE ITGA IN BRIEF OBJECTIVES

- Develop contact between tobacco growers around the world;
- Combat anti-tobacco growing campaigns internationally and nationally;
- Ensure that the legitimate interests of tobacco growers are adequately considered by national and international policy-makers;
- Enhance information exchange on technical and market factors;
- Publicise the socio-economic importance of tobacco in terms of employment, agricultural development and national economic benefits;
- Present our arguments rationally and objectively as to safeguard the ITGA's position as a credible, visible, effective force in the public debate.



ITGA members must be interacting with state or non-state organizations, UN Agencies inclusive; as we together look at supporting livelihoods of the tobacco dependent masses. (...) Let institutions support each other as we endeavor to sustain or improve livelihoods of tobacco farmers"

(Abiel M. Kalima Banda - ITGA Former President, Malawi)



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



WORLD ASSOCIATION

our strength

- ARGENTINA
- AZERBAIJAN
- BRAZIL
- BULGARIA
- CHINA
- COLOMBIA
- DOMINICAN REPUBLIC
- KOREA
- GREECE
- INDIA
- INDONESIA
- ITALY
- LEBANON
- MALAWI
- NORTH MACEDONIA
- PAKISTAN
- PHILIPPINES
- TANZANIA
- THAILAND
- U.S.A
- VIETNAM
- ZAMBIA
- ZIMBABWE

To Join

You can apply for membership by filling out the online application form available on our website www.tobaccoleaf.org. We will contact you as quickly as possible about your application. Alternatively, you can also contact us at our head-office, indicating the category of membership for which application is being made.



“The ITGA has a responsibility to assist in ensuring that farmers have a sustainable future in the farming business, even if it means growing less tobacco and more complementary crops where the demand for tobacco is declining.”

(François Van der Merwe - ITGA Former President, South Africa)



“Tobacco is a difficult but rewarding crop providing a dignified life for tens of millions of families in some of the poorest countries in the world or in poor regions of more developed countries. It employs millions of seasonal workers in agriculture, being one of the most important factors in the sustainable development of these countries and regions.”

(António Abrunhosa - ITGA Former CEO, Portugal)



MEMBERS



Tobacco Association of Zambia (TAZ)



TOBACCO ASSOCIATION OF ZAMBIA (TAZ)



TAZ was formed in 1930's in Chipata by the tobacco farmers, it was called Virginia Tobacco Association.

In 1964, it was renamed to Virginia Tobacco Association of Zambia.

Renamed to Tobacco Association of Zambia in 1990 to accommodate other types of Tobacco like Burley and dark fired tobacco.

The association is run by farmers who are elected in various tobacco growing districts. The association has since 1991 run the Lusaka sales floor, it also has farmer representation on the floors run by JTI in the east, west and central provinces and at Tombwe processing floors.

In 1994, the Association purchased the tobacco processing plant under the Zambia privatisation agency.

TAZ is 100% funded by Zambian tobacco farmers and the investment that they have made into various assets around Lusaka.

The main aims of the Association are to:

1. Promote brand Zambia
2. Enhance local value addition.
3. Ensure full traceability of its tobacco production.
4. Promote competitive marketing of the growers tobacco
5. And to ensure the tobacco we produce adhere to global gap requirements.

THE SOCIO-ECONOMIC FOOTPRINT
OF TOBACCO PRODUCTION IN

ZAMBIA

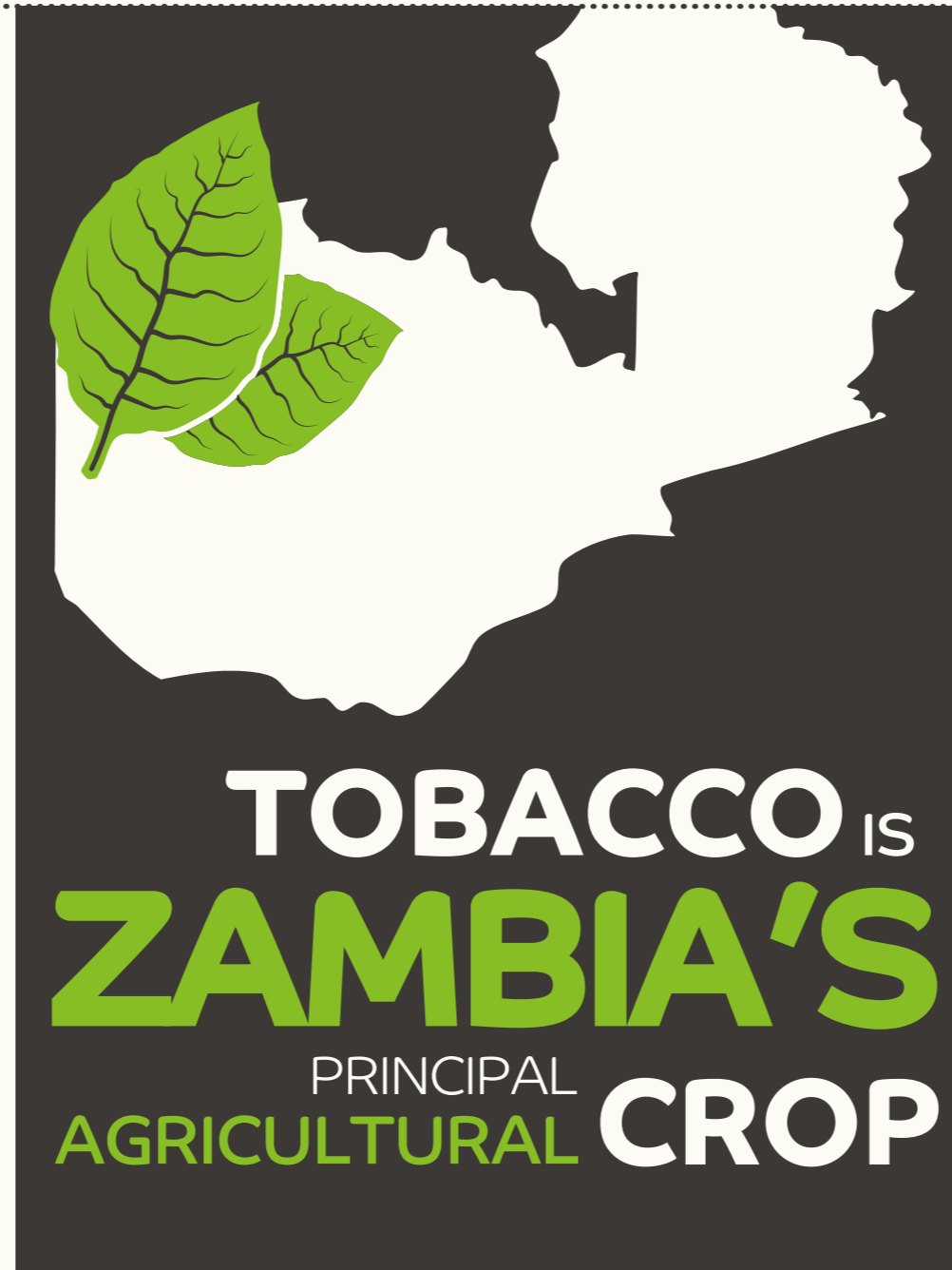
MORE THAN

20,000

TOBACCO GROWERS

TAKE PART IN THE

CROP EACH YEAR



TOBACCO GENERATES

MORE THAN USD

110 MILLION IN EXPORT REVENUE

ITGA AFRICA REGIONAL MEETING 2024 DETAILED PROGRAM

JUNE 26th

18:30 – 20:30 **Arrival of Delegates** – Welcome Cocktail
– Taz Pamodzi Hotel – Baobab Conference Room

JUNE 27th OPEN SESSION – Taz Pamodzi Hotel – Amalia Conference Room

MOC – PROTOCOL

08:30 – 08:45 Registration of Delegates – Official Opening & Open Day Meeting
08:45 – 08:50 Master of Ceremony – Introduction
08:50 – 09:00 Mr. Zvhikonyo Mahombe – TAZ, President – Welcome Address
09:00 – 09:10 Mr. José Javier Aranda – ITGA, President – Welcome Remarks
09:10 – 09:40 Hon. Mr. Reuben M'tolo Phiri – Minister of Agriculture, Zambia – Opening Speech
Gift to Guest of Honour and Group Photo

MARKET BLOCK

09:40 – 10:00 Mr. Ivan Genov – ITGA, Manager Tobacco Industry Analysis – Leaf Perspectives in 2024
10:00 – 10:20 Mr. Christopher Day – Euromonitor International, Research Analyst – Global Consumption Overview: Focus on Africa
10:20 – 10:40 **COFFEE BREAK**
10:40 – 11:00 **MARKET BLOCK PANEL DISCUSSION MODERATED BY IVAN GENOV**

MEETING THEME: FARM PRODUCTIVITY BLOCK

11:00 – 11:20 Mr. Brian Kapotwe – IFAD East and Southern Africa Division, Country Program Officer – Overview of Farm Productivity: Barriers Faced by Small Scale Farmers in Eastern Africa
11:20 – 11:40 Ms. Mercedes Vázquez – ITGA, CEO – Overview of Tobacco Yields: Trends in the Last 10 Years

PANEL DISCUSSION – ANALYSIS OF EASTERN AFRICA TOBACCO FARMING PRACTICES – MODERATED BY MERCEDES VÁZQUEZ AND IVAN GENOV

11:40 – 12:30
Alliance One International – Mr. Dave Taylor, Regional Leaf Production Director
CNT – Mr. Mathew Wilde, Sustainability and Agriculture Director
Japan Tobacco International – (TBC)
Hail & Cotton – Mrs. Irene Kumwenda, Environmental Social & Governance Manager
12:30 – 13:30 **LUNCH**

LEGISLATION BLOCK

13:30 – 13:50 Mr. Michiel Reerink – Alliance One International, International Corporate Affairs Director and Managing Director – EU Due Diligence Overview: Latest Developments
13:50 – 14:10 Mrs. Maria Reymão – Universal Leaf Tobacco Company, Director of External Affairs – Growing Concerns and Why Farmers Should Keep an Eye on Articles 17 & 18
14:10 – 14:40 **PANEL DISCUSSION LEGISLATION BLOCK – MODERATED BY MERCEDES VÁZQUEZ**
14:40 **ITGA AFRICA REGIONAL MEETING CLOSED SESSION (INTERNAL MEETING)**
ITGA ACTIVITIES OVERVIEW
COUNTRY REPORTS
19:00 **DINNER**
END OF DAY 1

JUNE 28th - FARM PRODUCTIVITY DEMO SESSIONS: TOMBWE FACILITIES

07:30 Delegates Departure from Hotel Lobby
08:30 **Arrival at Tombwe Facilities**
08:30 – 12:00 Tombwe Demo Session
Agronomy Practices Group Discussion: Focus on Small Scale Farming – Ivan Genov, ITGA Moderator – ITGA Africa Regional Meeting Participants & Local Partners
Return to Hotel Facilities for Lunch
12:00
14:00 **ITGA AFRICA REGIONAL MEETING CLOSED SESSION (INTERNAL MEETING)**
(Taz Pamodzi Hotel)
ITGA updates and regional coordination
19:00 Farewell Dinner

END OF MEETING

SPEAKERS ABSTRACT BIOS

IVAN GENOV

ITGA MANAGER TOBACCO INDUSTRY ANALYSIS

Mr. Ivan Genov is experienced in producing in-depth briefings and analysis on the global tobacco industry. He is in charge of content creation at ITGA, including the popular Tobacco Monitor and Tobacco Courier publications. Ivan is also a contributor to the business and mainstream media on tobacco-related topics, including Bloomberg, Tobacco Reporter and Tobacco Journal International. Ivan has worked within the EU institutions in Brussels and as a senior tobacco analyst at Euromonitor International in London. He holds a bachelor's degree in International Business and Management from Aston University in the UK and a master's degree in Strategic Management from Rotterdam School of Management in the Netherlands.



CHRISTOPHER JOHN DAY

*SENIOR RESEARCH ANALYST SUB-SAHARAN AFRICA
AT EUROMONITOR INTERNATIONAL*

Mr. Christopher Day is a senior research analyst for Euromonitor International, based in their South African offices, where his area of expertise include cannabis, tobacco, alcoholic drinks and non-alcoholic drinks. During his studies he obtained three degrees, including a BA Politics, Philosophy and Economics (PPE), Hon. International Relations and an MA in Political Science, specializing in policy analysis in the mining industry. Prior to Euromonitor, Christopher has been involved in the research and analysis in several industries, including mining, pharmaceuticals, medical equipment, solid waste management, along with macro country analysis. Expertise: Country, Market Analysis, Consumer Insights and Trends, Forecasting



BRIAN KAPOTWE

*IFAD EAST AND SOUTHERN AFRICA DIVISION,
COUNTRY PROGRAM OFFICER*

Dr. Brian Kapotwe is a seasoned Agriculture and Economic Development Professional, currently working as the Country Programme Coordinator for the United Nation's International Fund for Agricultural Development (IFAD) in Zambia. Prior to joining IFAD, Dr. Kapotwe worked for various local and international organisations such as Oxfam and the Netherlands Development Organisation (SNV) on agriculture and rural development, covering a range of issues including programme management, value chain development and financing models for agricultural interventions. Dr. Kapotwe has worked with the public and private sector and academia in the pursuit of improving the efficiency of agriculture, especially among small-scale farmers. He is a proponent of pro-poor economic development models as a means to reducing poverty and inequality in Africa. He has authored several papers on the importance of agriculture to economic development, poverty reduction and wealth creation. Dr. Kapotwe's academic credentials include a Master of Science in Economic Policy Analysis and a PhD in Agricultural Economics from the University of Zambia.



MERCEDES VÁZQUEZ

ITGA CHIEF EXECUTIVE OFFICER

Since joining the International Tobacco Growers' Association (ITGA) in 2010, Spanish-born Mercedes Vázquez, accumulated a rather prominent profile in the tobacco sector thanks to her work travels to all corners of the world closely liaising with local growers and their institutions. This has made it possible for her to get close to the specific concerns and challenges growers are facing, as well as the common ones. In this process, Mercedes has reunited a vast knowledge of the sector as she has been part of the many and different activities developed by ITGA. Besides, Mercedes has also participated in International events all through these ten years.

Before joining ITGA, Mercedes was a teacher and worked also in the leisure and tourism business. She is graduated in translation and interpretation, but her focus in the last ten years have been in the area of communication.



MICHIEL REERINK

INTERNATIONAL CORPORATE AFFAIRS DIRECTOR

AND MANAGING DIRECTOR, ALLIANCE ONE INTERNATIONAL

Mr. Michiel Reerink is Alliance One International's (AOI) international affairs director and managing director of Alliance One International GmbH, based at the company's Swiss office. Reerink directs AOI's international corporate affairs, represents AOI with governments, legislators, nongovernmental organizations, industry organizations and other trade associations and provides outreach to share the company's views and positions with the wider public. Reerink started his career in the tobacco industry in 1996 at the association of Dutch fine-cut tobacco manufacturers in The Hague, representing its members' interests with Dutch and European legislators and politicians.

He then joined Imperial Tobacco in 2001, working across a range of corporate affairs and anti-illicit trade roles nationally and regionally as well as at Imperial's Bristol head office. In 2004, he established and subsequently managed Imperial's EU affairs office in Brussels. Prior to joining AOI in 2020, Reerink worked at Japan Tobacco International from 2010, leading the global regulatory strategy department at the company's Geneva headquarters where he established and executed comprehensive strategies to address emerging regulatory and corporate affairs issues worldwide. Reerink received a Bachelor of Arts degree in physics and a master's degree in Dutch law. He has lived and worked in the Netherlands, USA, Belgium, Germany, U.K. and Switzerland.



MARIA REYMÃO

*DIRECTOR OF EXTERNAL AFFAIRS,
UNIVERSAL LEAF TOBACCO COMPANY*

Mrs. Maria Reymão is Director of External Affairs at Universal Leaf Tobacco Company. Among other, Maria coordinates group corporate affairs activities in the Africa and Europe regions, monitoring relevant regulatory framework, to develop Group policies and educate subsidiaries and local operations teams as required, and representing the company in several institutions and third party processes, such as human rights due diligences/ assessments.

Before starting at Universal, she practiced law and human rights, and was responsible for setting up a school feeding program in northern Mozambique. Maria has a bachelor of Laws by the Faculdade de Direito da Universidade de Lisboa, Portugal, and recently completed a course on Sustainable Supply Chain Management



Supply Chain Visions

MARIA REYMÃO

*(DIRECTOR OF EXTERNAL AFFAIRS,
UNIVERSAL LEAF TOBACCO COMPANY)*



What's your company's vision towards Sustainability?

At the core of our business is awareness of how a changing world can impact our company and being an agricultural company, we are sensitive to the impacts of climate change and social supply chain risks. Early on we built resilience in our supply chain by investing in diverse regions around the world, and now we are accelerating and refining practices to offset our contributions to GHG emissions and to mitigate the risk of labor issues, so that our global investments can continue to be sustainable.

What examples would you like to highlight?

Universal has set emissions targets that were approved by the Science Based Target Initiative (SBTi), and we are looking into the future for pathways to net zero emissions. Farmers are essential to creating a lasting impact on emissions reductions. Universal provides extension services to our farmers, so that they use efficient methods in fertilizer application and curing. Our engagement extends beyond instructing farmers on the consequences of changing weather patterns and the importance of resiliency. In Africa, we build dams to store water, so farmers are able to water seed beds early in the growing season if the rains are late. In Mexico, we have invested and financed drip irrigation, an efficient method of irrigation that uses less water by applying water directly to the roots. Our agronomy centers also work to develop tobacco varieties that are drought tolerant as well as pest and disease tolerant.

What is the key factor that could help growers increase their productivity and income?

Our engagement trains farmers on methods to use their resources for producing their crop most effectively. Crop diversification on tobacco growing farms has for decades been encouraged by the sector as a manner of complementing income and maximizing the productivity of land accessible to a farmer. Universal also implements projects to enhance farmer resources, such as, distribution of food crop inputs, access to water sanitation and hygiene, and financial education programs.

What do you think have been the biggest changes in the tobacco sector in the past decade?

For years, the tobacco industry has prioritized farmer monitoring and engagement, but in the last 10 years the external scrutiny and expectations around farmer engagement has increased substantially. Working with farmers on productivity and human rights expectations has never before been analyzed to the current extent. Working with our farmers will continue to be a crucial part of meeting customer and regulatory expectations.

DAVE TAYLOR

REGIONAL LEAF PRODUCTION DIRECTOR
AT ALLIANCE ONE INTERNATIONAL



What's your company's vision towards Sustainability?

Our Company believes everything we do is to transform people's lives so that together we can grow a better world. As a global leaf supplier, efforts that help preserve the environment are directly linked to the success of our business and supply chain. Given our diverse global footprint, we believe our Company is positioned to have a wide-reaching, positive impact on key environmental and social issues.

What examples would you like to highlight?

In 2021, our Company introduced its global ESG framework, which sets measurable goals that help our business drive positive change and create long-lasting impacts. In total, we have 16 ESG targets that align with 12 material sustainability topics. Many of these targets are ones that we must engage with our suppliers to drive the greatest impact.

For example, our most ambitious target is to achieve net-zero value chain emissions by 2050. Our scope 3 emissions are mainly farm-related, which means we must work together with growers to reduce key contributors to GHG emissions such as tobacco curing. Curing tobacco with a sustainably produced wood supply emits less emissions and also prevents deforestation, which is another environmental issue in many African tobacco-growing countries.

One project we have implemented to achieve this goal is the development of 9,000ha of forestry plantations, which produce more than 100,000 stacked cubic meters of curing fuel annually. This afforestation effort enables self-sufficiency in curing fuel for the Malawi flue-cured farmers while also mitigating the risk of deforestation.

Another ESG target that we are working to achieve is the maximization of our contracted farmers' income potential by 2030 through appropriate training in good agricultural practices and the opportunity for crop diversification.

In Malawi, we have developed a groundnut business to provide smallholder farmers access to loan facilities, new seed varieties, GAP training related to the crop and a market for post-harvest sale. The groundnuts serve as a complementary income to their tobacco production, helping to improve overall livelihood.

What in your opinion is the key factor that might help growers increase their productivity and income?

We believe one of the main ways to improve grower productivity and income potential is improved management of soil health, specifically pH, organic matter and tillage, which will help mitigate the risks of climate change. We have programs in place to provide contracted farmers with knowledge of proper soil health management methods and continue to update these methods as the research evolves.

What in your opinion have been the biggest changes in our sector in the last ten years?

The development and implementation of supply chain traceability has been a significant change, and it continues to evolve. For example, our SENTRI platform provides verifiable, accurate and comprehensive information on our products' production journey, from seed to sale. These insights can be used to:

- Promote and verify compliance with our Agricultural Labor Practices (ALP) program, local laws and global regulatory frameworks;
- Help contracted farmers understand areas of improvement, which can lead to improved livelihoods; and
- Give customers assurance of each step in their product's production journey.

Traceability capabilities are more important now than ever as we see due diligence regulations coming into effect in various countries, and generally, a greater emphasis placed on human rights-related issues. Compliant products with track and trace verification can offer opportunities to sustain and potential grow the demand for tobacco grown in Africa.

SURVEY

ITGA is proud to work in main tobacco growing markets in the world directly reaching out to farmers through our Tobacco Growers' Association in each country.

Thanks to this direct contact ITGA is able to provide transparency in the information shared.

Please contribute to the survey we are running in this meeting to help us create evidence based information and promote transparent sources of information.

ITGA AFRICA REGIONAL MEETING

theme: Farm Productivity
26th to 28th June, Zambia



ITGA 2024 AFRICA REGIONAL MEETING SURVEY



ITGA Information and media Partners

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Notes

ITGA
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ITGA AFRICA REGIONAL MEETING





ITGA AFRICA REGIONAL MEETING





ITGA PROMOTES BEST PRACTICES.

THROUGH ITS DIFFERENT
PLATFORMS IN ORDER TO:

- Keep growers updated about market evolution and future demand
- Help growers balance the supply and demand of tobacco to avoid over production
- Help growers make better choices respecting their environment
- Help growers find ways to improve work conditions and avoid child labour practices
- Help growers, through our exchange of information, meet new approaches of farming towards sustainability

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ITGA 40
International Tobacco Growers' Association
40 years of Growers' Strength