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Crop Update

Yunnan

In July, Yunnan's tobacco-growing regions experienced above-average but uneven rainfall, while temperatures of 22–28°C provided favorable conditions for aroma development.

Tobacco harvesting entered a key stage, with lower leaves being harvested in early-planted fields and middle and upper leaves reaching full maturity. Growers intensified disease management, optimized curing practices, and adopted integrated harvesting and curing techniques to improve leaf quality.

Meanwhile, tobacco processing plants operated at full capacity, upgrading intelligent grading systems and testing biological enzyme fermentation technology to enhance the yield and quality of premium tobacco leaves.

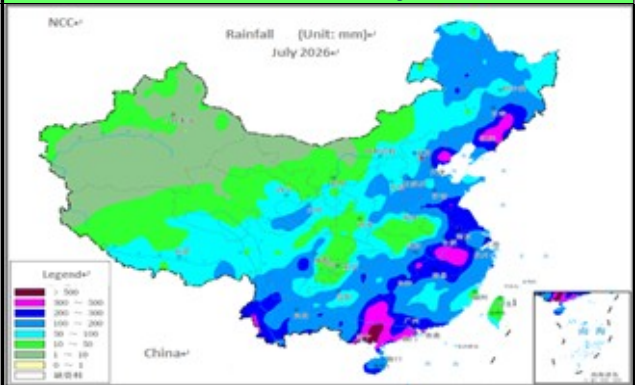
Guizhou

In July, Guizhou experienced flooding in the north and drought in the south. Northern tobacco-growing areas received around 20% above-normal rainfall, increasing the need for drainage, while southwestern Guizhou and Liupanshui recorded below-average precipitation and temperatures reaching 32°C, resulting in mild drought stress in some tobacco fields.

Harvesting and curing activities were in full swing, with farmers adopting improved harvesting practices, optimizing water and fertilizer management, and coordinating labour to ensure tobacco leaves were picked at optimal maturity.

Meanwhile, the Guiyang Redrying Factory completed an upgrade to its precision leaf-processing line, improving the accuracy of blending tobacco leaves from different production regions.

China Rainfall July 2026

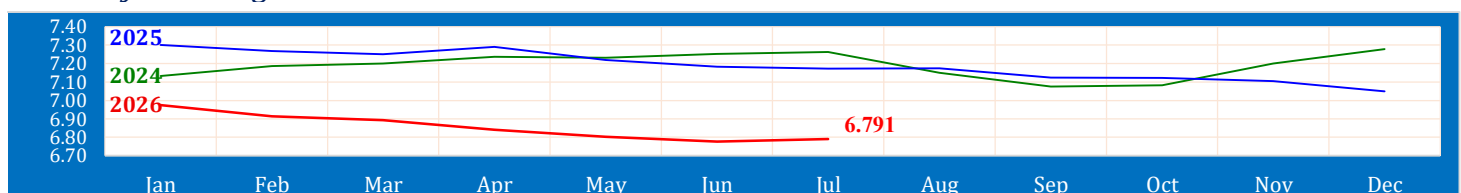


Currency Exchange (USD 1 : CNY x.xxx)

Monthly Average

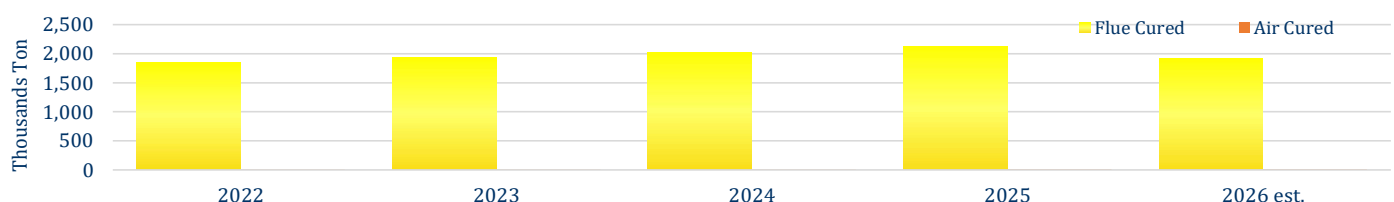
Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2026	6.974	6.914	6.888	6.841	6.802	6.768	6.791					
2025	7.301	7.269	7.251	7.291	7.220	7.183	7.172	7.176	7.125	7.121	7.105	7.049
2024	7.133	7.186	7.202	7.237	7.233	7.253	7.263	7.151	7.076	7.082	7.202	7.279

Currency Exchange



Crop Size (Metric Tons)

Variety	2022	2023	2024	2025	2026 est.
Flue Cured	1,853,000	1,933,000	2,019,000	2,130,000	1,917,500
Air Cured	8,000	10,000	10,000	13,700	12,000



2026 Crop Progress

Variety	Seedbed Sown	Transplanted	Harvested	Cured	Sold to date
Flue Cured	100 %	100 %	35 %	-	-
Burley	100 %	100 %	40 %	-	-

FCV Crop Summary	2023	2024	2025	2026 est.
Crop Size - M/Tons	1,933,000	2,019,000	2,130,000	1,917,500
Planting Area - Hectares	986,228	1,042,900	924,700	850,000
Number of Growers	724,680	725,000	728,000	700,000
Average Plot Size/Grower - Hectares	1.36	1.44	1.27	1.21
Average Income/Grower	RMB 108,200 USD 15,135	RMB 110,364 USD 15,353	RMB 108,000 USD 15,876	

General News

Yunnan	Yunnan Tobacco Industry Updates – July 2026 Kunming held its 2026 flue-cured tobacco field management and harvesting/curing work meeting in Shilin County. Participants reviewed tobacco field conditions during the flood season, observed mechanized harvesting operations, and outlined measures for batch harvesting, precise curing of lower leaves, and strengthened late-season field management to improve tobacco quality. Dali Prefecture organized a tobacco leaf grading skills competition alongside standardized curing technology training. Experts promoted precision temperature control in curing and provided hands-on training in leaf harvesting, sorting, and furnace loading to support large-scale harvesting and curing. CNTC Yunnan began preparations for the 2026 procurement and storage season by training quality inspectors on standardized purchasing, grading, and inspection procedures. Large-scale deliveries of new-crop tobacco to redrying factories have not yet begun. The Yunnan Academy of Tobacco Agricultural Sciences, China Agricultural University, and Yunnan Redrying factories jointly launched research on changes in moisture, chemical composition, and aroma compounds during curing and re-curing. The project focuses on improving upper-leaf processing technologies and generating technical data to support more consistent re-curing and better utilization of raw tobacco materials.
Guizhou	Guizhou Tobacco Industry Updates – July 2026 Guizhou continued to strengthen its integrated pest and disease management system by expanding smart monitoring and early-warning capabilities. Demonstration projects in Bijie and southwestern Guizhou promoted green pest control practices, reduced reliance on chemical pesticides, and enhanced disease prevention during the critical mid- to late-growing stages. In Liupanshui's Shuicheng District , farmers carried out field removal of unsuitable lower tobacco leaves to improve nutrient allocation to middle leaves. This practice aims to increase the proportion of higher-grade tobacco while reducing the production of low-quality leaves and minimizing curing losses. Qishe Town, Xingyi , promoted a centralized professional curing model through cooperative-managed curing facilities. Standardized harvesting, leaf preparation, and temperature-controlled curing helped reduce green and over-cured tobacco, lower labour costs, and improve curing efficiency and leaf quality. Tobacco-growing areas in Xingyi entered the lower-leaf harvesting stage, with more than 1,500 acres of flue-cured tobacco beginning the first round of harvest. Standardized topping and stem-retention practices contributed to a 31% year-on-year reduction in disease incidence , a decline in curing losses to 5.7% , and an increase in the proportion of high-quality tobacco to 68.3% .

End of Report

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