



This issue...

- Crop Update
- China Rainfall
- Currency Exchange (average)
- Crop Size
- Crop Progress
- General News

Crop Update

Weather: Main flood season, with temperatures slightly above normal and uneven rainfall. Heavy rains caused excessive moisture in low-lying tobacco fields, increasing the risk of black shank and bacterial wilt.

Yunnan

Tobacco: Lower-leaf harvesting is largely complete; middle leaves are being harvested and cured, while upper leaves are maturing. Harvesting is expected to finish by mid-September, with weighing by mid-October.

Processing: GLT plants are preparing materials according to China Tobacco Industry orders. Export tobacco will be sorted and regraded after purchase.

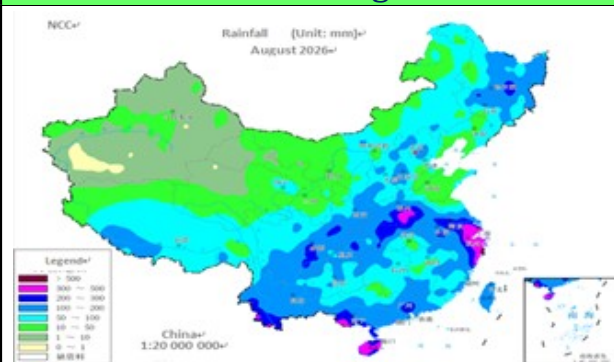
Guizhou

Weather: Good rainfall and moisture conditions supported upper-leaf maturity. However, localized heavy rain caused some drainage issues and pressure on curing-house capacity.

Tobacco: The province entered the peak period of harvesting, curing, weighing, and sales, with harvesting expected to be completed by mid-to-late September.

Processing: GLT factories are preparing production according to China Tobacco Guizhou orders, prioritizing threshing and regrading of main-filler tobacco. Export tobacco is mainly being domestically purchased and graded, with regrading volumes increasing gradually in line with sales.

China Rainfall August 2026

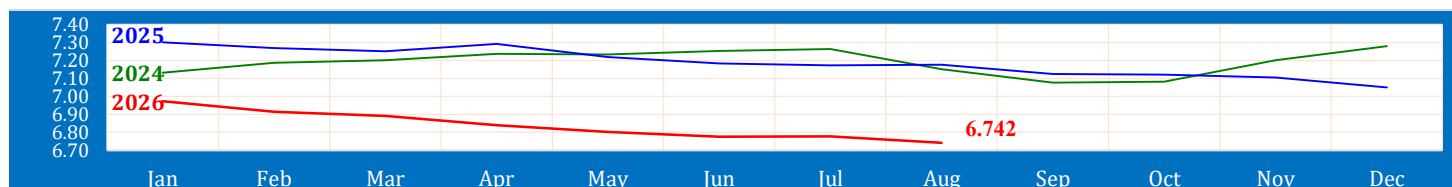


Currency Exchange (USD 1 : CNY x.xxx)

Monthly Average

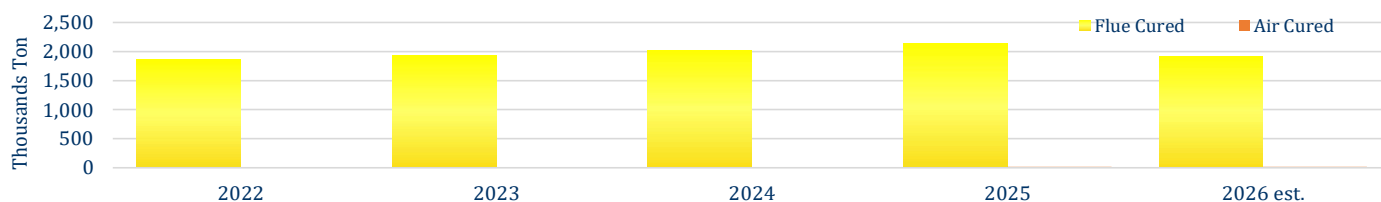
Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2026	6.974	6.914	6.888	6.841	6.802	6.775	6.778	6.742				
2025	7.301	7.269	7.251	7.291	7.220	7.183	7.172	7.176	7.125	7.121	7.105	7.049
2024	7.133	7.186	7.202	7.237	7.233	7.253	7.263	7.151	7.076	7.082	7.202	7.279

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 %	80 %	5 %	-
Burley	100 %	100 %	75 %	-	-

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 – August 2026 In August, Yunnan tobacco-producing areas focused on mature harvesting, curing management, pest control, and quality improvement. • Xiangyun: Strengthened harvesting and curing management through a three-level “curing master-supervisor-instructor” system. Weather monitoring and hail/flood prevention were reinforced, with strict control of mature harvesting, grading, curing temperature/humidity, and post-curing moisture. • Xundian: Promoted green pest management using ecological trapping and physical control. Sunflowers, solar insecticidal lamps, and biological control were used to reduce pest pressure at source. • Shizong: Strengthened precision production and acquisition management, linking fresh-leaf classification, mature harvesting, and curing points to support balanced and orderly tobacco purchases. • Chuxiong: A new southwest-region flue-cured tobacco variety is being piloted in Cangling Town for agricultural evaluation, covering agronomic traits, disease resistance, yellowing performance, and cured-leaf quality. Production records for transplanting, water/fertilizer management, and pest control are also being standardized. • Luquan: Entered the maturity and intensive harvesting/curing period, with grid management and a strict “no harvesting if standards are not met” policy. Fresh-leaf grading and curing are closely monitored to prevent green or over-ripe tobacco from entering the process. • Shilin: Strengthened precision production and source control, including strict seedling management, standardized planting, and removal of diseased or damaged plants to improve grade purity and purchasing quality. Overall: Yunnan is emphasizing standardized harvesting, curing control, green pest management, and source-quality control to improve grade consistency and acquisition quality for the 2026 crop.
	Guizhou Tobacco Industry Updates – August 2026 In August, Guizhou focused on harvesting, curing, acquisition preparation, quality control, and precision production to ensure stable tobacco quality during the second half of the year. • CNTC Guizhou: Held a tobacco leaf work symposium in Guiyang to coordinate second-half preparations, focusing on harvesting and curing, quality improvement, precise planning and control, grade management, scheduled sales, and source control. • Southwestern Guizhou: Mountain tobacco areas entered the mature harvesting period. Standardized stem height, topping, and disinfection were implemented, together with graded and batch harvesting to address uneven maturity caused by mountain microclimates and support centralized curing. • Liupanshui: Promoted harvesting and curing while conducting procurement and grading training to standardize grading standards and management procedures. • Dejiang: Established physical tobacco-leaf demonstration racks showing samples by maturity, leaf position, and curing color. This helps growers harvest according to standards and reduce the mixing of green, immature, or over-ripe leaves. • Qianxinan: Introduced a “grading at the curing stations” model, moving grading activities to curing-house groups to improve initial purity and address labor shortages. • Suiyang: Entered the curing season, with Yangchuan Tobacco Station combining weather warnings, aerial pest-control services, and smart curing barns. Professional growers are using soil-testing-based fertilization, optimized leaf retention, and mechanization to improve curing efficiency and quality. Overall: Guizhou is strengthening standardized harvesting, smart curing, grading control, and procurement preparation, with greater emphasis on precision management and source quality to improve the consistency and value of the 2026 crop.

End of Report

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