REPORT
10
PERIOD
October 2026

Monthly Crop & Market REPORT

CHINA





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Crop Update

Yunnan

Weather: In October, Yunnan transitioned from the rainy season to the dry season, with near-normal temperatures but uneven rainfall. Heavy rain, strong winds, hail, and persistent autumn rain in eastern and southern areas affected the autumn harvest.

Tobacco: Tobacco purchasing across Yunnan was completed by mid-October. Throughout the growing season, standardized field management practices, including soil cultivation and precision fertilization, were implemented. Electric curing barns were also introduced to improve curing quality. Current activities are focused on reviewing the annual performance and preparing for the next production season.

Processing: Yunnan GLT Re-drying factory continued equipment upgrades, with several factories initiating projects for air separation, impurity removal, and foreign matters detection systems to improve automation and processing quality.

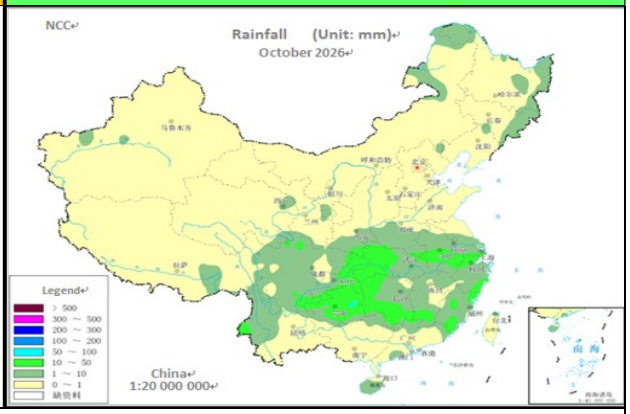
Guizhou

Weather: October brought fluctuating temperatures and rainfall to Guizhou. While early-month rains caused high humidity in some areas and meteorological drought in western parts, incoming cold air triggered widespread rain and 4–8°C temperature drop across the region.

Tobacco: Production entered its final curing and purchasing stage. Guiyang focused on refining harvesting and curing practices while expanding the use of clean-energy facilities.

Processing: Tobacco Re-drying factories upgraded their facilities by installing natural gas boilers and conducting pressure pipeline inspections. They also adopted a direct station-to-factory delivery model to cut down handling, increase efficiency, and protect tobacco leaf quality. The tobacco leaves transport to GLT factories began this month and tobacco leaf re-sorting began in all GLT's.

China Rainfall October 2026

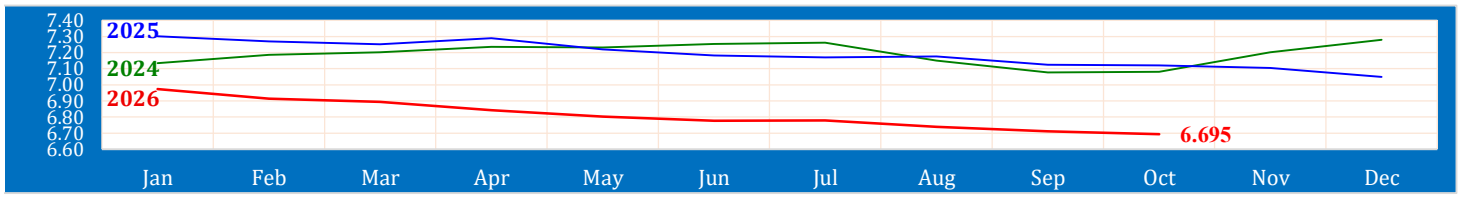


Currency Exchange (USD 1 : CNY x.xxx)

Monthly Average

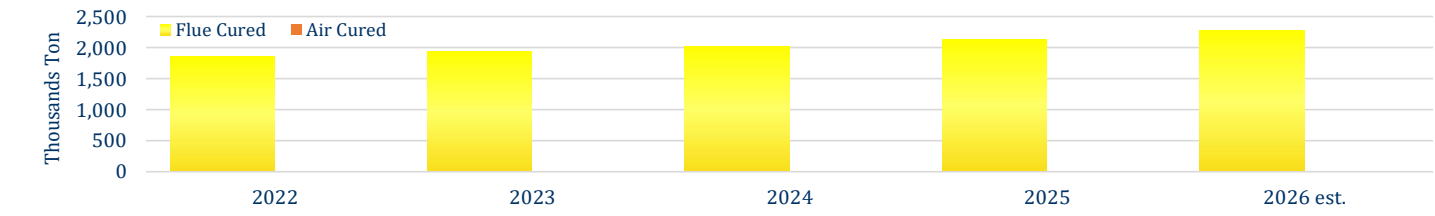
Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2026	6.974	6.914	6.888	6.841	6.802	6.775	6.778	6.738	6.710	6.695		
2025	7.301	7.269	7.251	7.291	7.220	7.183	7.172	7.176	7.125	7.121	7.105	7.049
2024	7.133	7.186	7.202	7.237	7.233	7.253	7.263	7.151	7.076	7.082	7.202	7.279

Currency Exchange



Crop Size (Metric Tons)

Variety	2022	2023	2024	2025	2026 est.
Flue Cured	1,853,000	1,933,000	2,019,000	2,130000	2,280,000
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 %	100 %	90 %	80 %
Burley	100 %	100 %	100 %	80 %	40 %

FCV Crop Summary	2023	2024	2025	2026 est.
Crop Size - M/Tons	1,933,000	2,019,000	2,130,000	2,280,000
Planting Area - Hectares	986,228	1,042,900	924,700	895,000
Number of Growers	724,680	725,000	728,000	700,000
Average Plot Size/Grower - Hectares	1.36	1.44	1.44	1.27
Average Income/Grower	RMB 108,200 USD 15,135	RMB 110,364 USD 15,353	RMB 108,000 USD 15,876	

General News

Yunnan	Shizong Redrying Factory has issued an invitation for bids to upgrade its air-selection impurity removal equipment. Aiming to remove foreign matters during the preliminary stages of threshing and redrying to enhance leaf purity, this initiative represents an intelligent upgrade on the processing side by Yunnan Leaf Tobacco Redrying Co., Ltd. Xuanwei Redrying Factory is currently commissioning an automated foreign matter detection and removal system. By integrating online metal and non-metal detection into the redrying line, the facility aims to support high-end cigarette raw material processing while cutting down manual sorting costs. Luxi and Chuxiong redrying Factories are advancing energy-saving and eco-friendly technical upgrades, which include waste heat recovery in curing barns and optimized dust collection. Concurrently, on the agricultural front, data on tobacco crop rotation and soil conditioning are being reviewed to align with "Green Factory" standards. The Tobacco Research Institute of the Chinese Academy of Agricultural Sciences held a field observation event on green disease prevention and control in the Qujing tobacco region. The exchange focused on biological control methods for viral diseases and black shank, alongside the application of beneficial insects, marking a key extension of agricultural research. In response to continuous autumn rainfall, Honghe Prefecture has issued guidance on clearing drainage ditches to prevent root rot, while intelligent curing barns are being utilized to precisely regulate temperature and humidity, safeguarding the quality of already-harvested tobacco leaves.
Guizhou	Guiyang Tobacco Area: Finalizing precision harvesting and curing, following the principle of early lower-leaf, timely middle-leaf, and fully mature upper-leaf harvesting. Expanded use of clean-energy curing facilities is helping improve leaf oil content and colour. Xingyi City, Guizhou: Tobacco purchasing concluded smoothly. The “station-to-factory direct delivery” model reduces handling and helps maintain tobacco aroma and quality consistency. Bozhou District, Guizhou province promotes the "tobacco leaf + vegetable/grain and oil" crop rotation. Following harvest and curing, crops such as rapeseed and potatoes are planted to increase land productivity and tobacco farmers' incomes. The Tobacco Research Institute of the Chinese Academy of Agricultural Sciences released soil microecological findings for the southwest tobacco region. In Zunyi and Bijie, continuous cropping obstacles were analyzed, and a biochar plus antagonistic microbe plan was proposed. Central and eastern Guizhou experienced excessive humidity, while the west faced drought. Drainage management was implemented in the east to prevent black shank, and supplemental irrigation was provided in the west to protect late-maturing tobacco, accompanied by clear guidance on agricultural disaster prevention. CNTC Guizhou held a scientific and technological innovation meeting. Disease-resistant germplasm, low-harm tobacco leaves, and digital tobacco fields have been deployed, and CNTC has signed research agreements with the research institutes to improve the quality of medium-flavor tobacco leaves.

End of Report

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