Assessment of Tobacco-Leaf Production, Marketing and Purchasing Practices in Pakistan



Data Collection Period
22 Sep 2026 to 3rd Oct 2026

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Rationale of the Study



Tobacco cultivation is key to Pakistan's **agriculture and economy**, but faces market, pricing and regulatory challenges.

The study assesses transparency, fairness and compliance with PTB laws for existing market practices.

Key Rationale

Market Practices
Understand market dynamics

Contracting Arrangements
Assess agreements and supply chain

Pricing & Payments
Check pricing and payment practices

PTB Compliance
Ensure adherence to laws

Regulatory Gaps
Identify shortcomings

Evidence-Based Policy
Support informed policy decisions

Bottom Line: The study informs policies to promote a fair, transparent and compliant tobacco market in Pakistan.

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Tobacco Regulatory Framework



Tobacco Crop is a **Federal Subject**

Governing Ministry
Ministry of National Food Security and Research

Regulatory Authority
Pakistan Tobacco Board (PTB)

Main Functions of the Board

- Regulates Tobacco Crop
- Price Regulation
- Exports Facilitation
- Development of Tobacco Crop

Major Laws Governing Tobacco Crop in Pakistan

- Martial Law Order 487
- Tobacco Marketing Rules
- Federal Tobacco Cess Rules

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Sampling Methodology

Fieldwork Period
22 September – 3 October 2026

Survey Type
In-person, face-to-face interviews

Total Sample Size
1,200
FCV tobacco farmers



Survey Districts and Sample Size

Swabi	660
Mardan	360
Charsadda	180
Total	**1,200**



1 District Selection
Swabi, Mardan and Charsadda were selected as the study districts.

2 Identification of Tobacco-Growing Areas
Relevant tehsils, union councils and villages were identified using available information.

3 Village/Cluster Selection
Villages or field clusters were selected using a probability-based approach.

4 Farmer Selection
Eligible FCV tobacco farmers were selected through a standardized farmer selection procedure.

5 Final Sample
A total of 1,200 completed farmer interviews were conducted across the three districts.

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SECTION 1

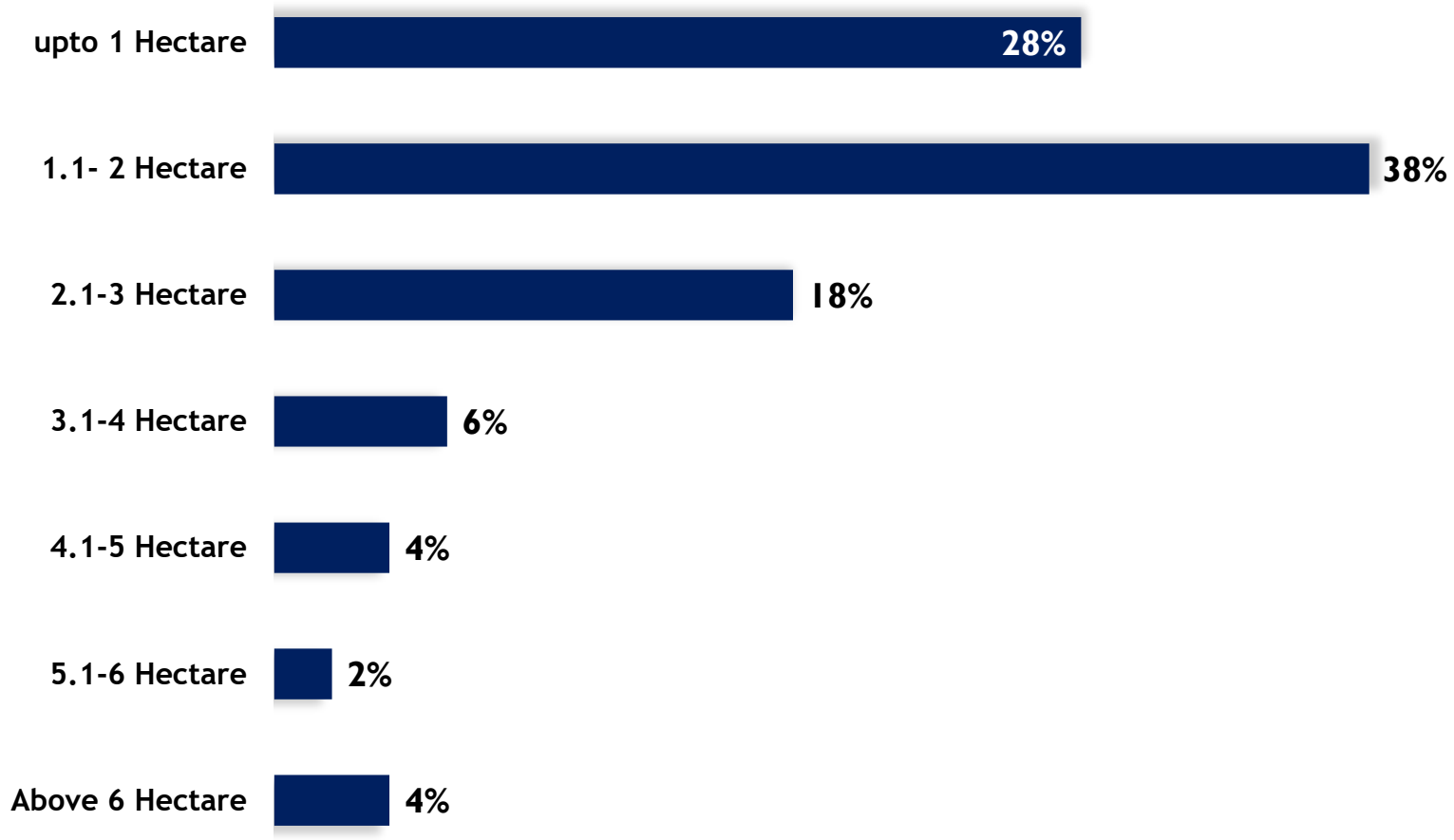
FARMER & TOBACCO CULTIVATION PROFILE



- Farmer Profile
- Tobacco Cultivation Practices
- Land & Input Use
- Production and Yield

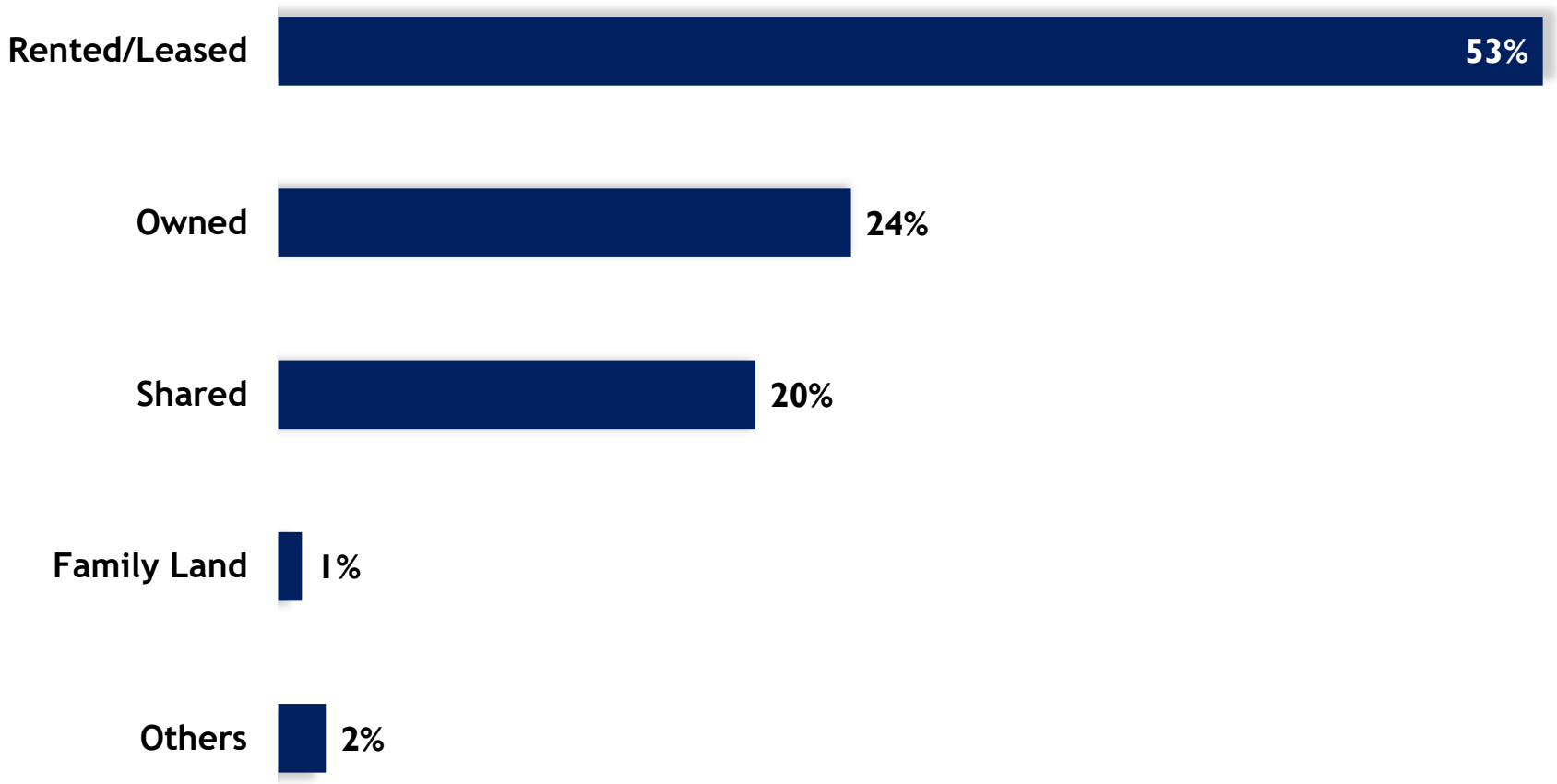
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Approximately how much land did you cultivate with FCV tobacco during the current crop season?



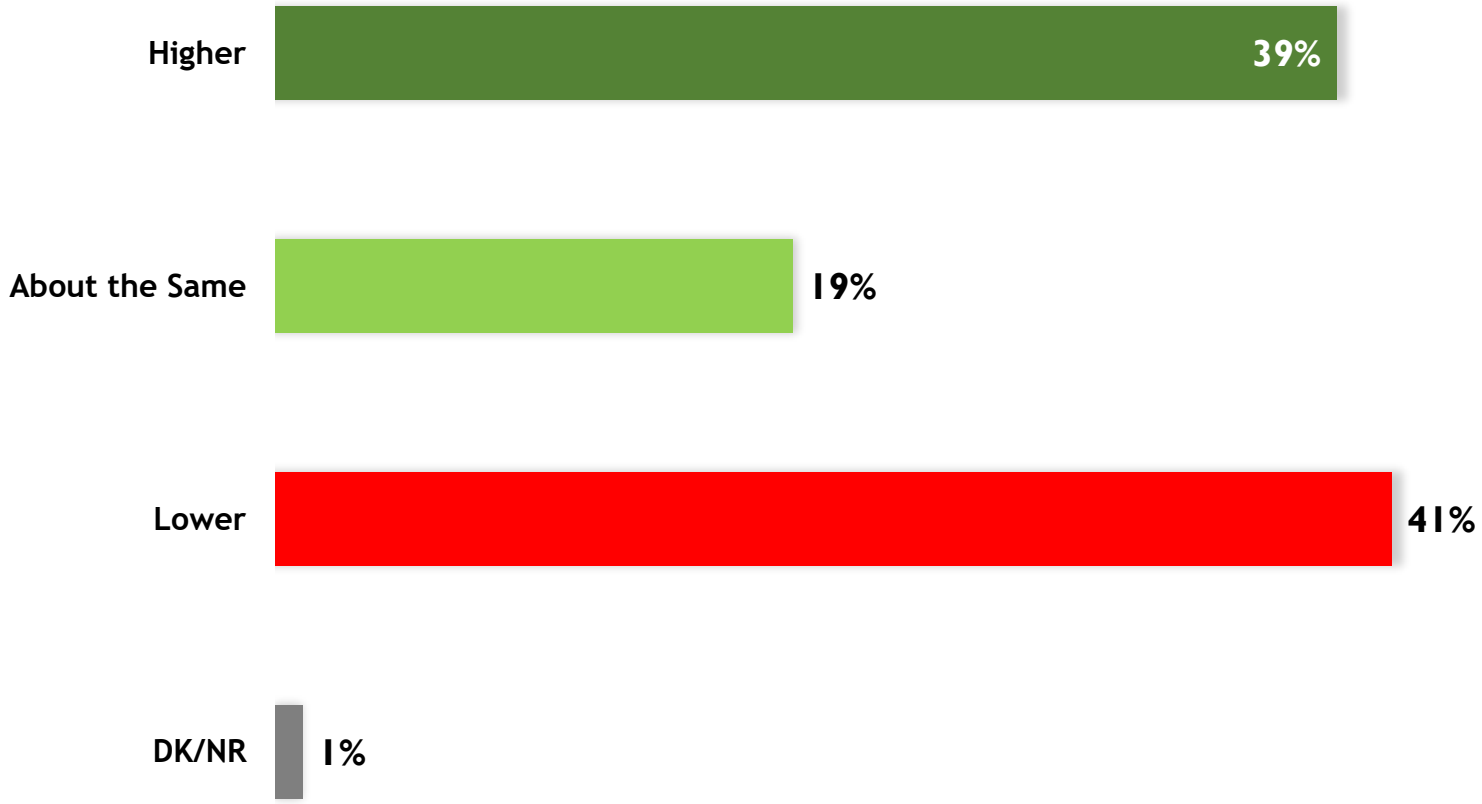
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Was this land owned by you, rented, leased or cultivated under another arrangement?



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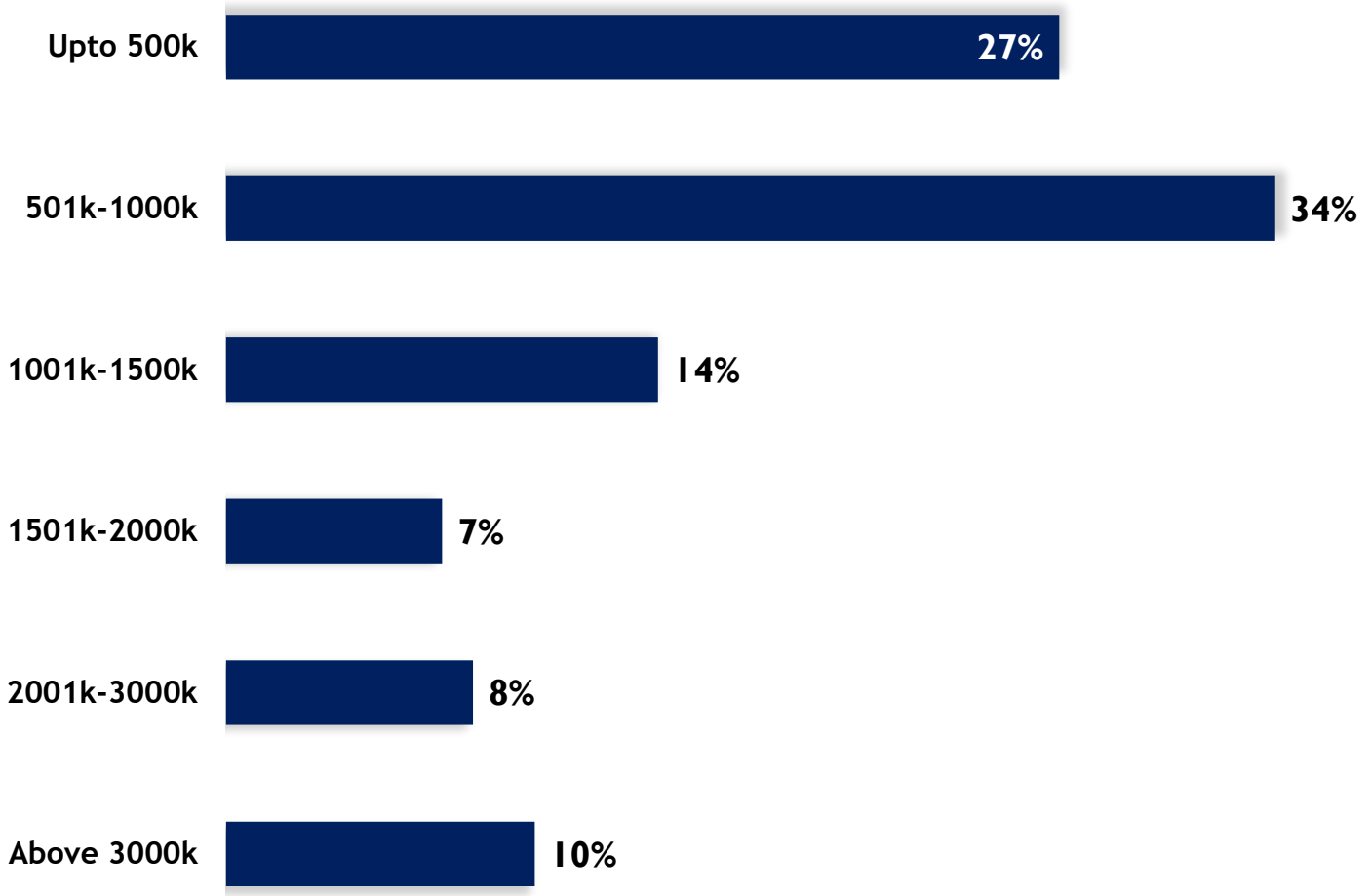
Compared with the previous crop season, was your FCV tobacco production this year:



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Approximately how much (PKR) did you spend in total on inputs for your FCV tobacco crop this season — including seed/seedlings, fertiliser, pesticides, and fuel/wood for curing?

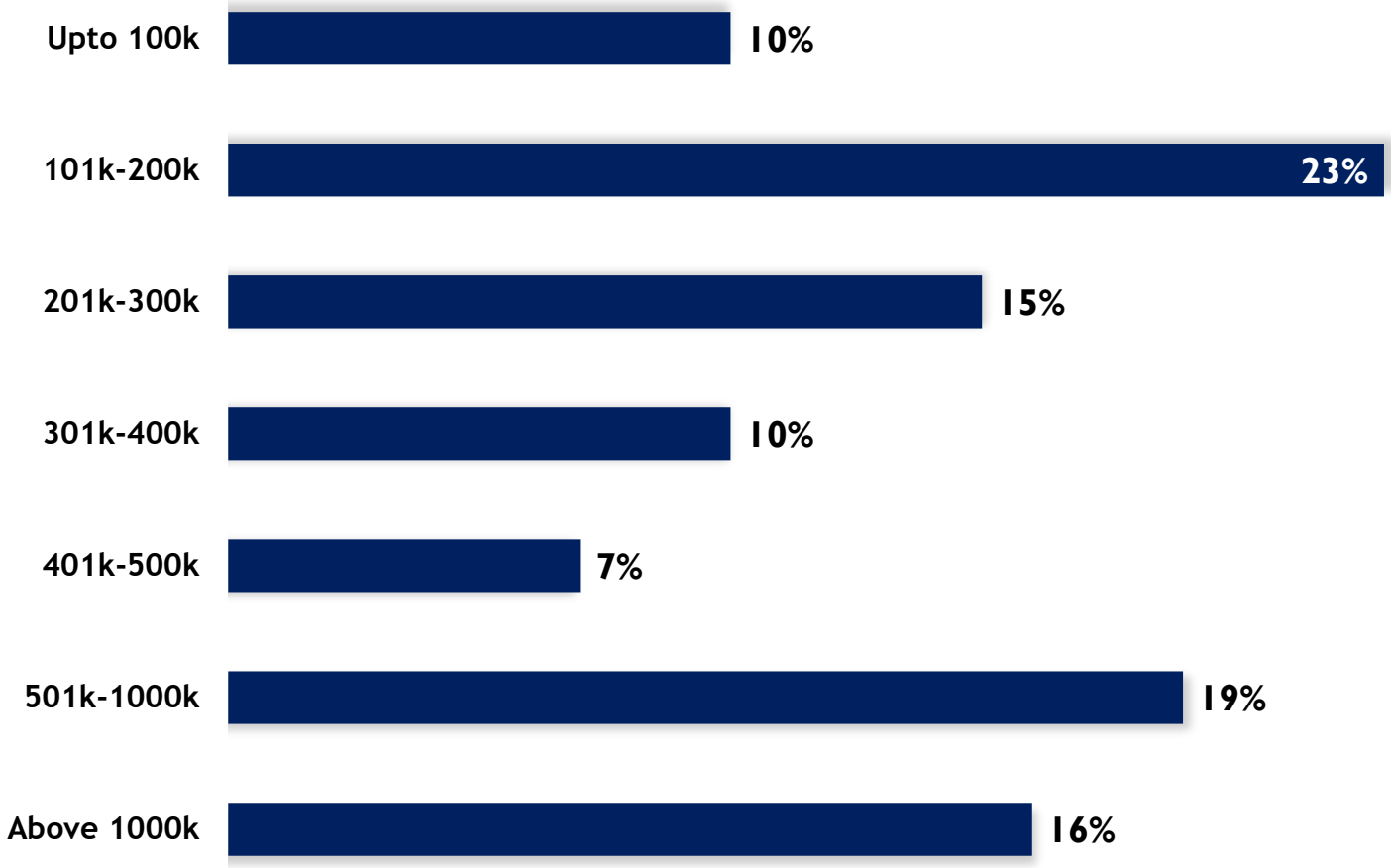
(Per Hectare Cost)



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Approximately how much did you spend on labour for your FCV tobacco crop this season – including hired labour for transplanting, harvesting, curing and grading?

(Per Hectare Cost)



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SECTION 2

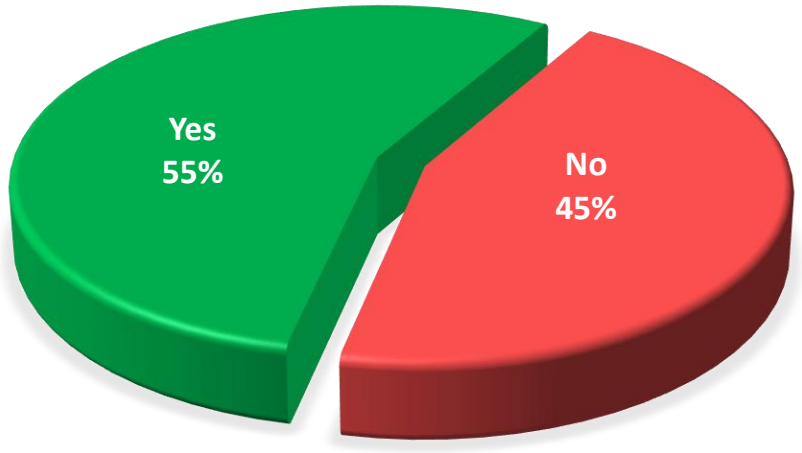
CONTRACTING & AGREEMENTS



- Contract Types
- Buyers & Sellers
- Terms & Conditions
- Agreement Process

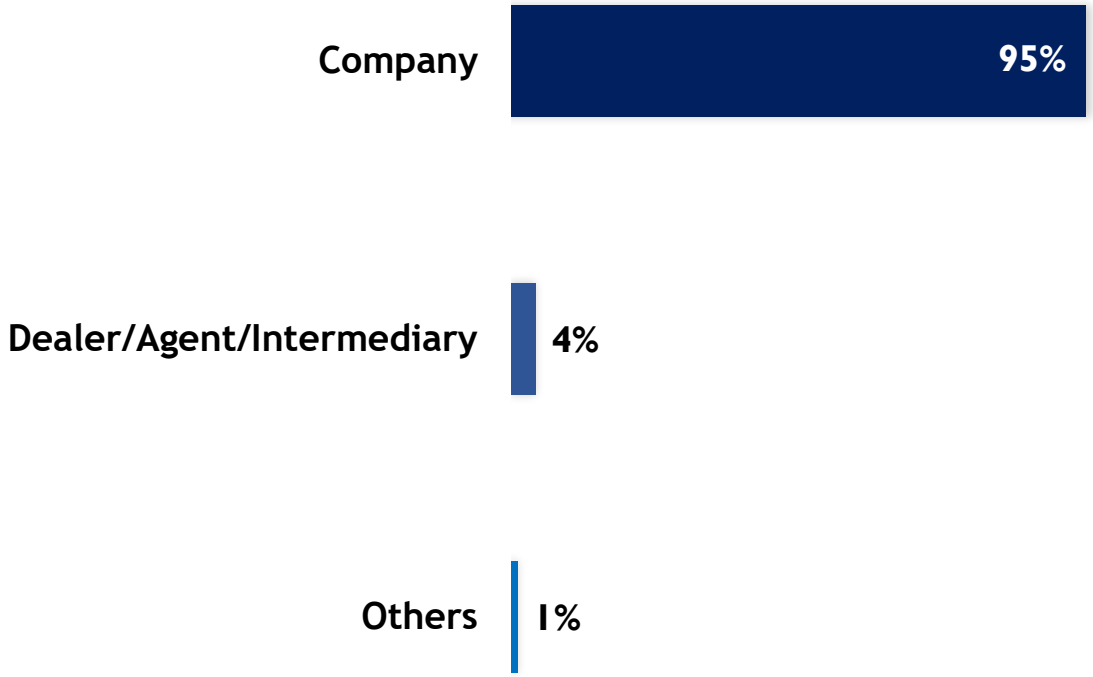
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Before the current crop was planted, did you have a written agreement or contract with a tobacco company or other purchaser?

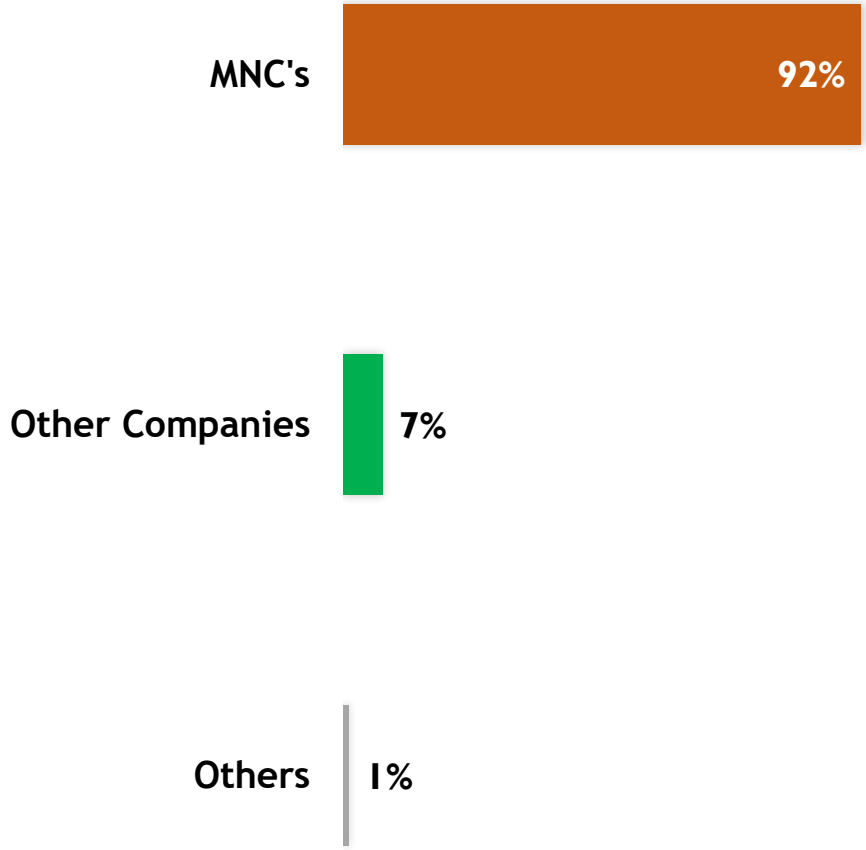


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With whom did you have the written agreement?
(those 55% who said they have agreement)
659/1200

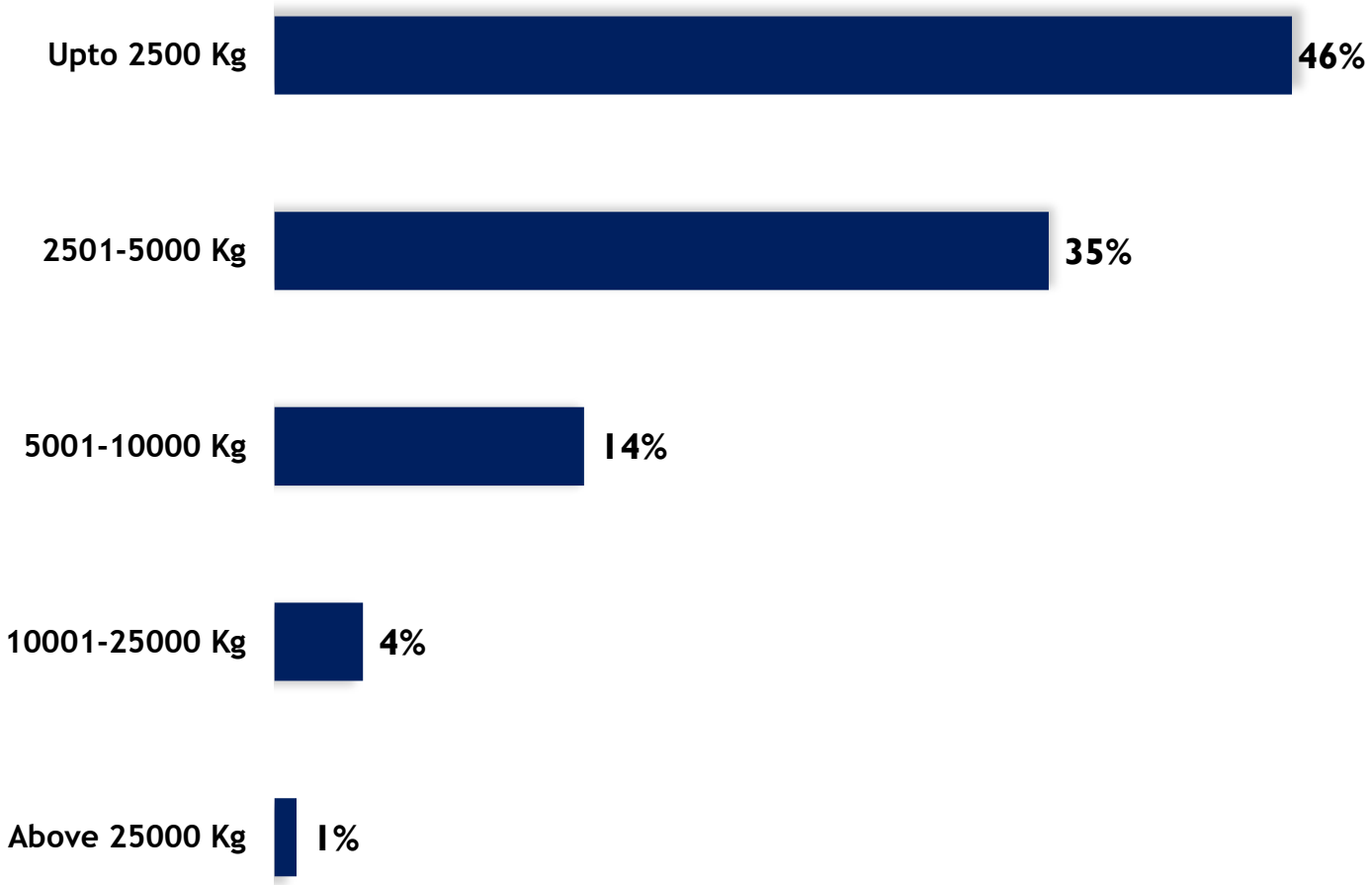


Classification of Companies



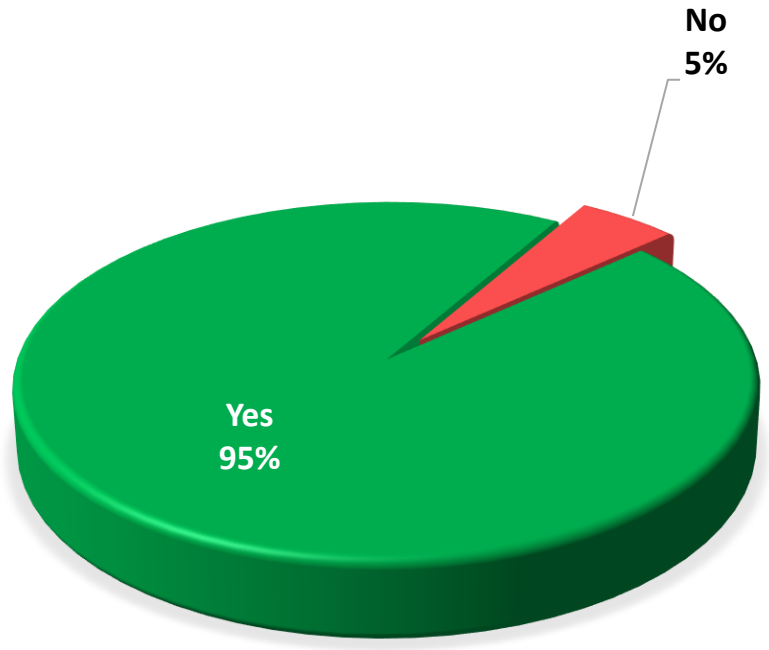
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Approximately how much tobacco was covered by your agreement?
(those 55% who said they have agreement)



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Did you receive any document or copy of the agreement?
(those 55% who said they have agreement)



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SECTION 3

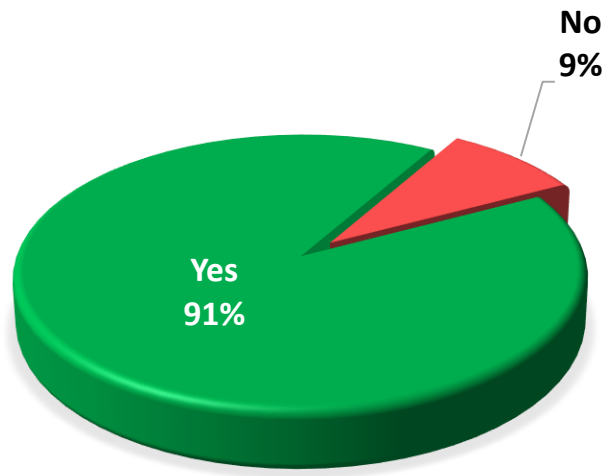
TOBACCO SALES & BUYERS



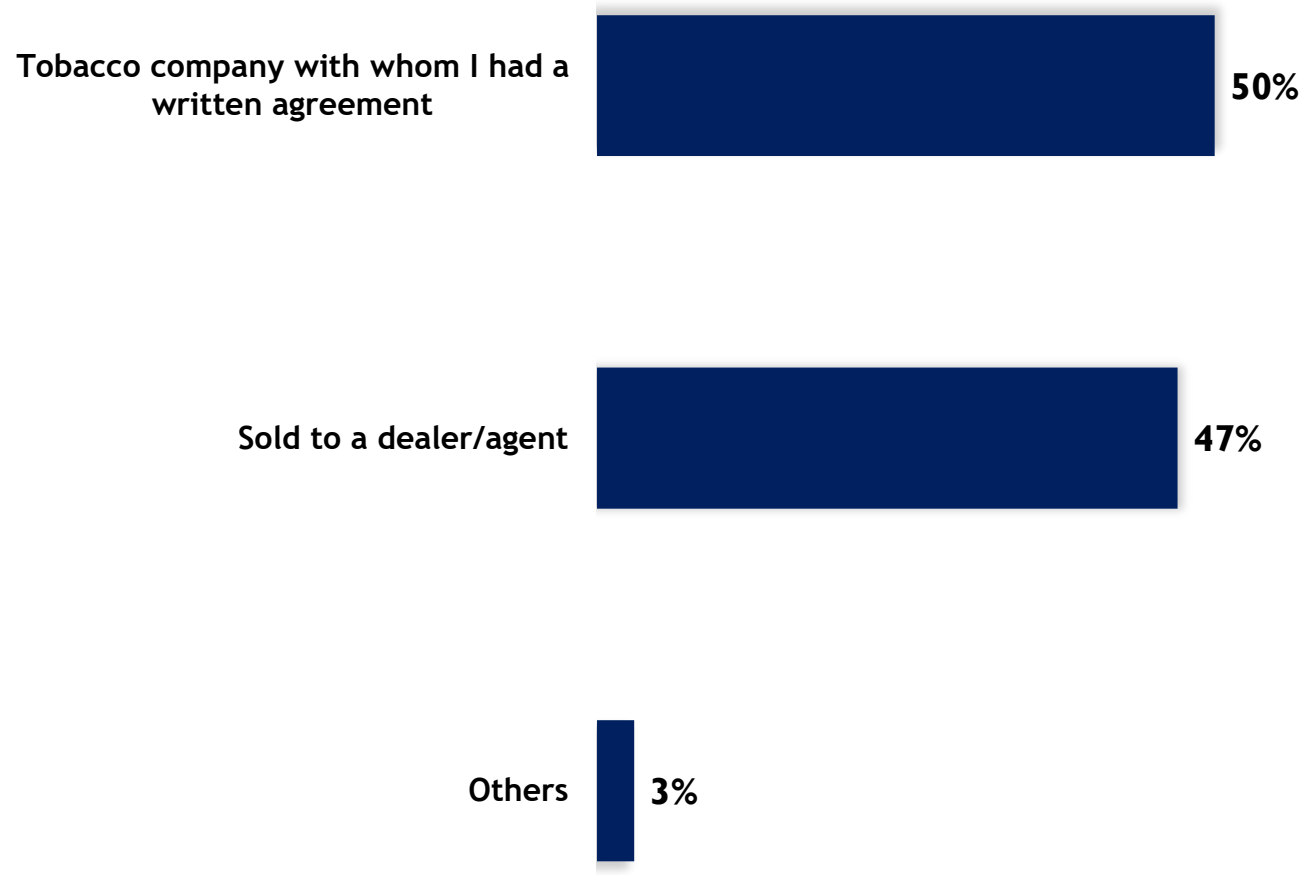
- Sales Channels
- Buyers and Purchasing Arrangements
- Pricing and Grading
- Payments and Farmer Experience

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Have you sold any FCV tobacco from the current crop?

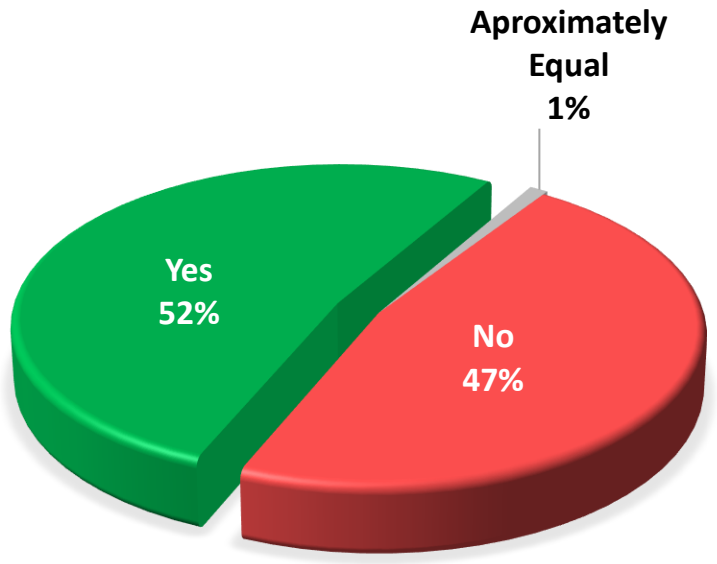


To whom did you sell your tobacco?

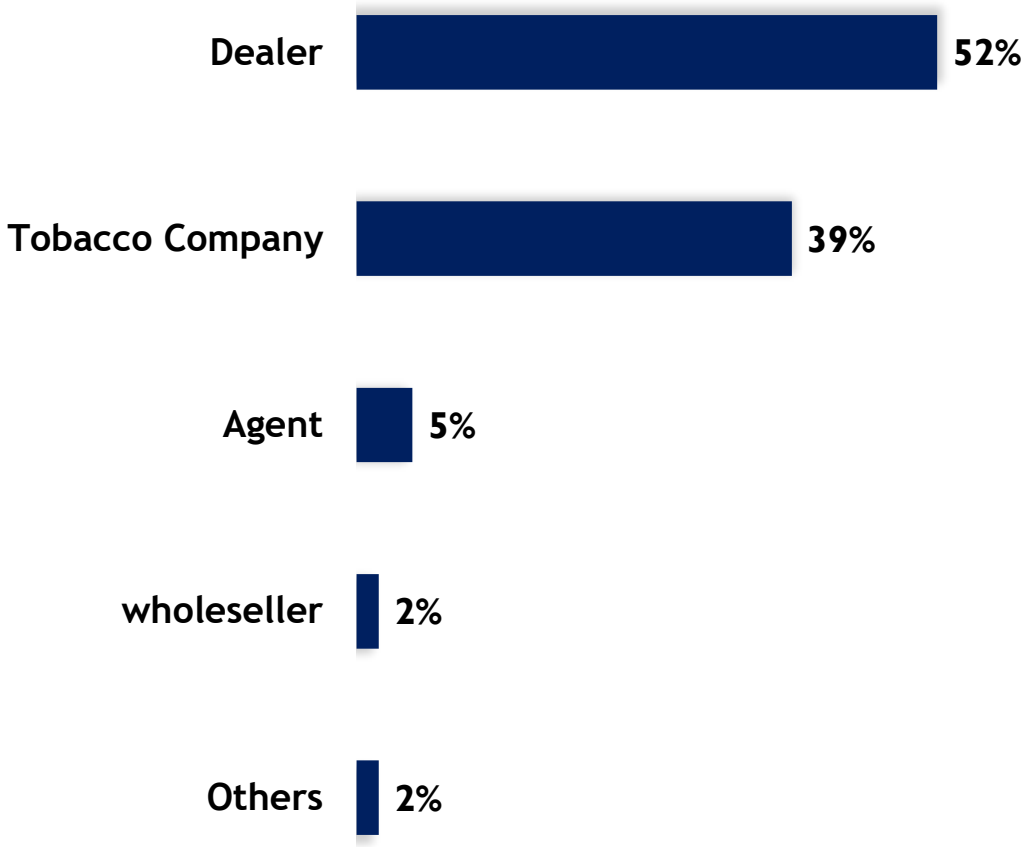


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Did you sell any tobacco to an entity with whom you did not have a direct written agreement?

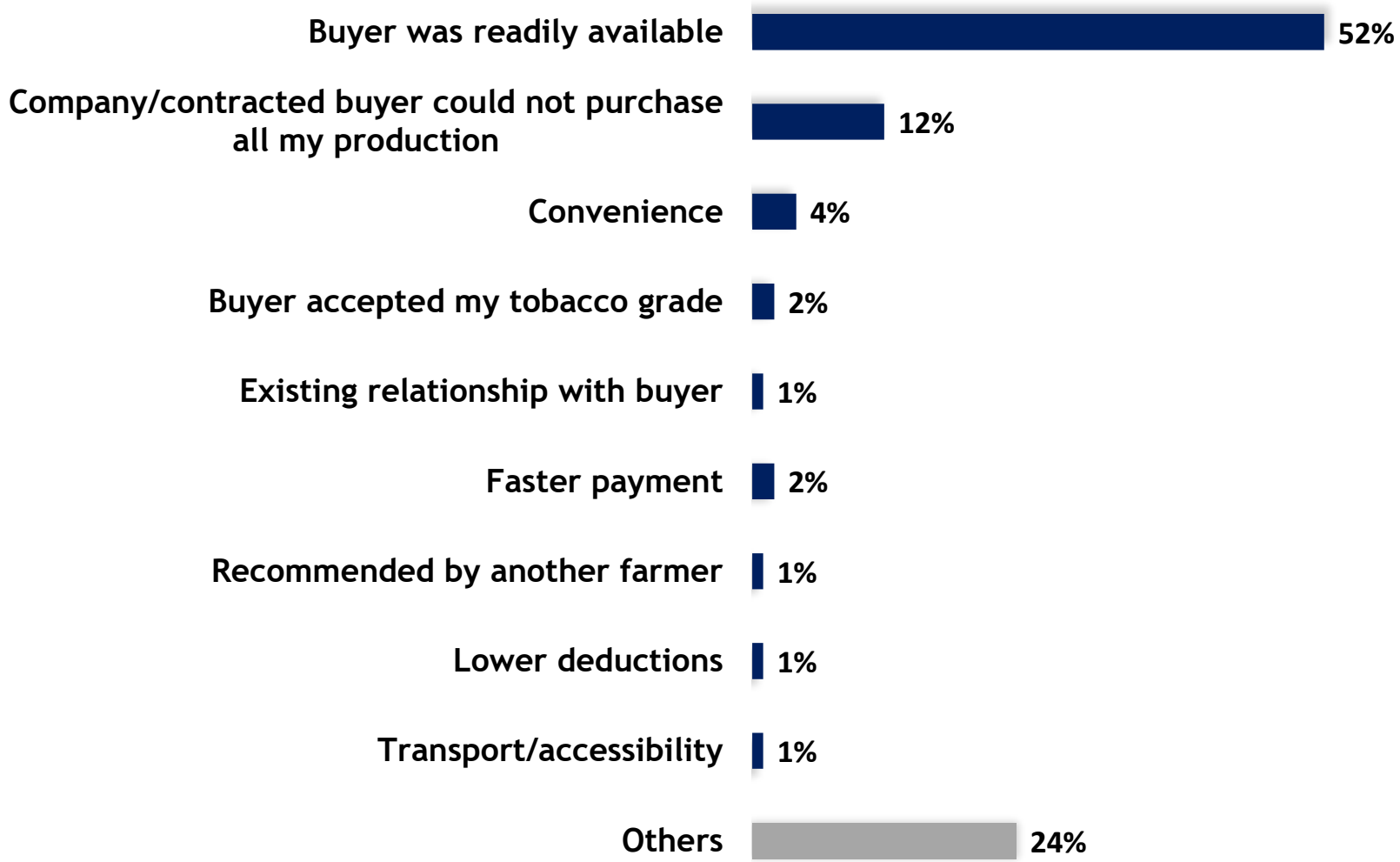


If yes, who purchased this tobacco? (Those 52% who Said "Yes")



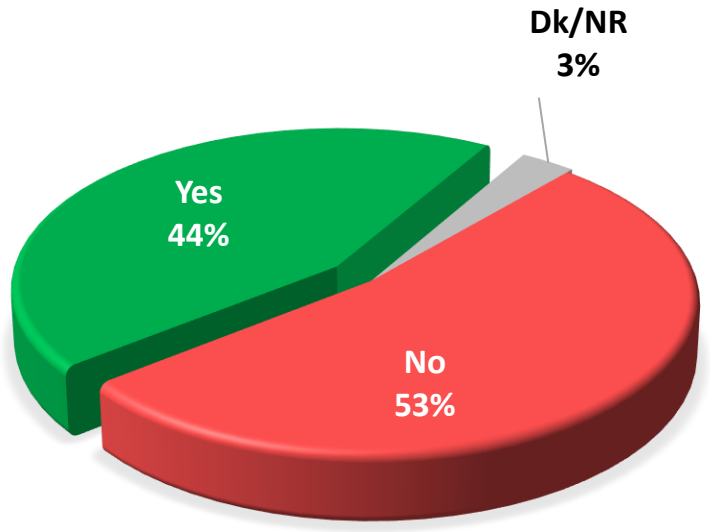
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What were the main reasons you sold tobacco through this buyer/channel?
(Those 52% who Said "Yes" to selling without agreement)

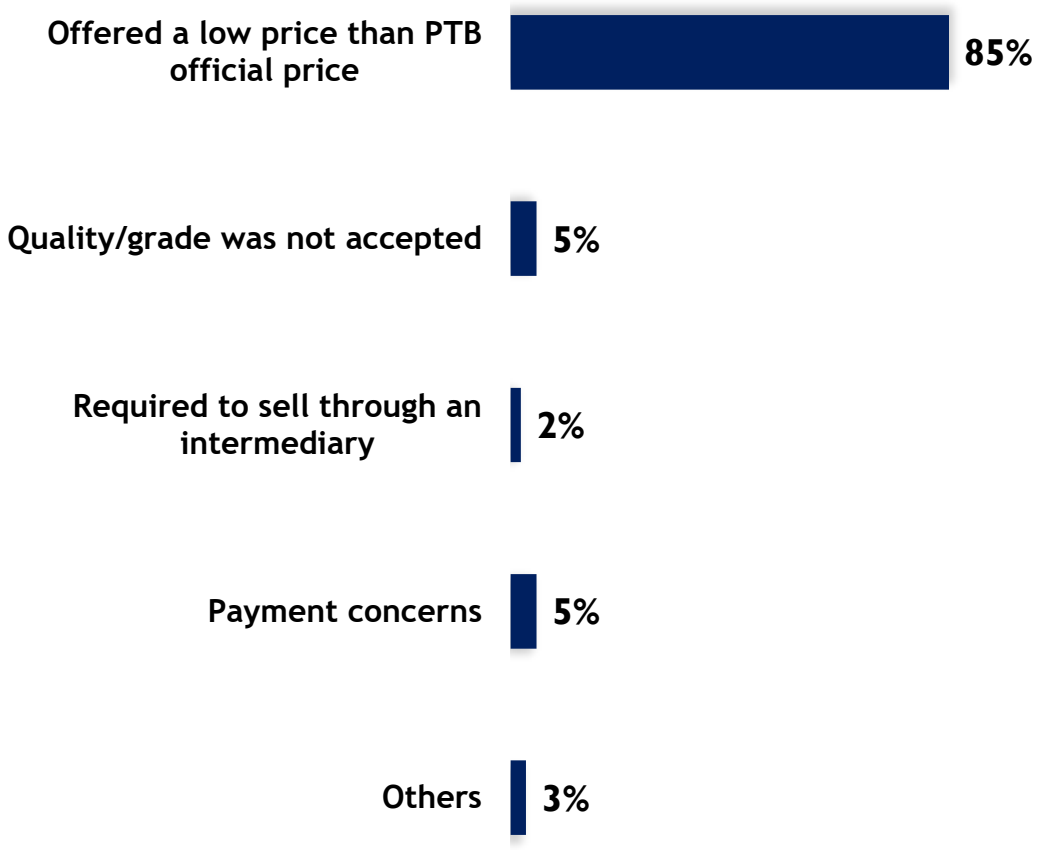


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Did you experience any difficulty selling the quantity that was not covered by your formal agreement?



If yes, what difficulty did you experience?



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SECTION 4

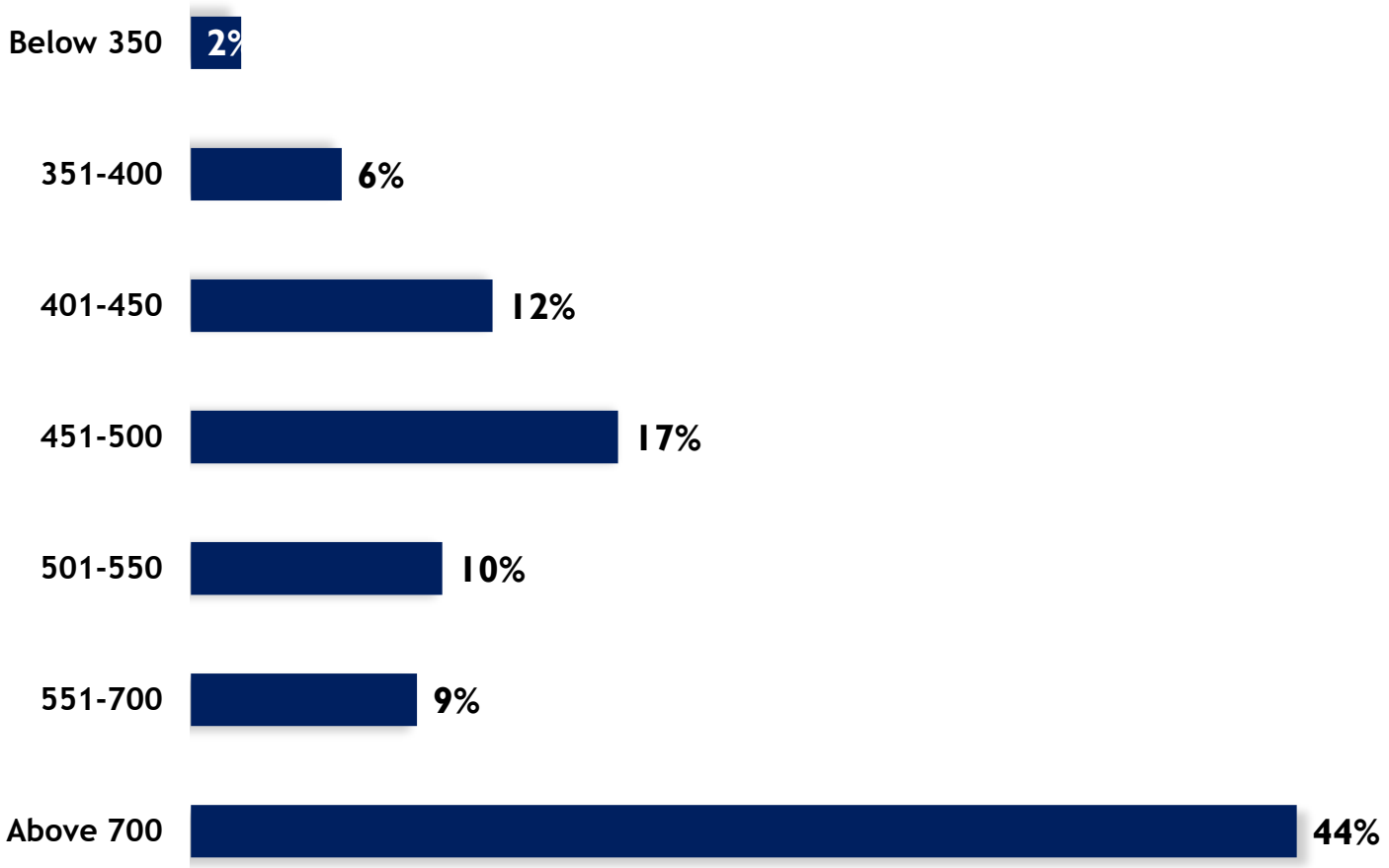
PRICING & GRADING



- Price Determination
- Grading Criteria
- Price Variation and Trends
- Farmer Satisfaction

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At what price per kilogram did you sell your tobacco to your main buyer?



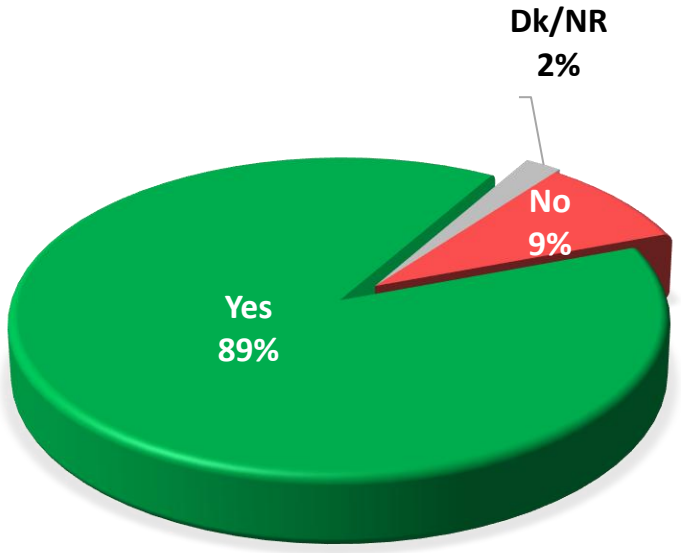
Average Price
(Who sold to MNC's)
PKR 720

Average Price
(Who sold to other Companies)
PKR 559

Average Price
(Who sold to Dealers)
PKR 471

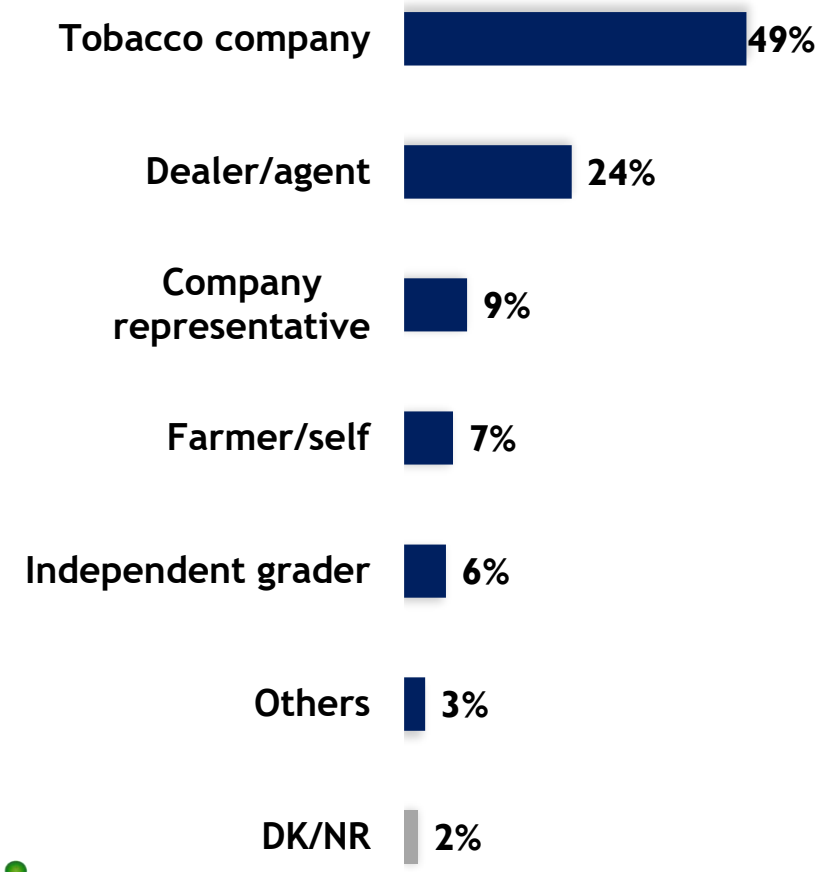
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Was the price different for different grades of tobacco?

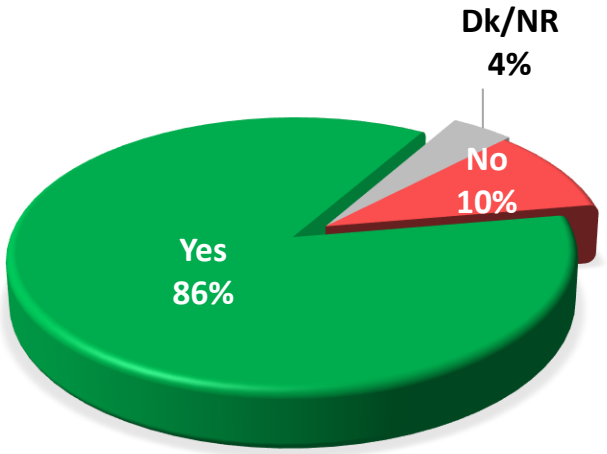


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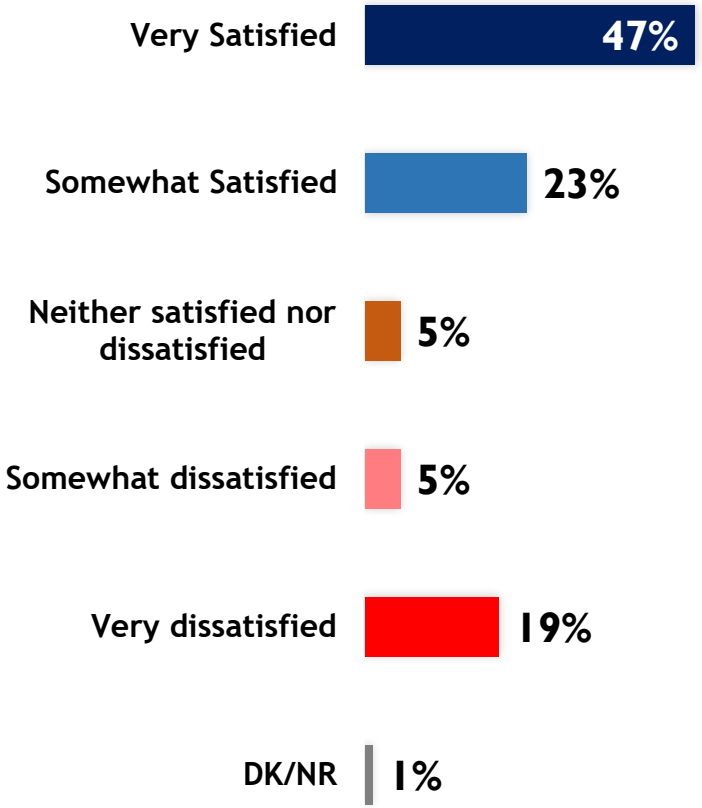
Who determined the grade of your tobacco?



Were you informed of the grade assigned to your tobacco?

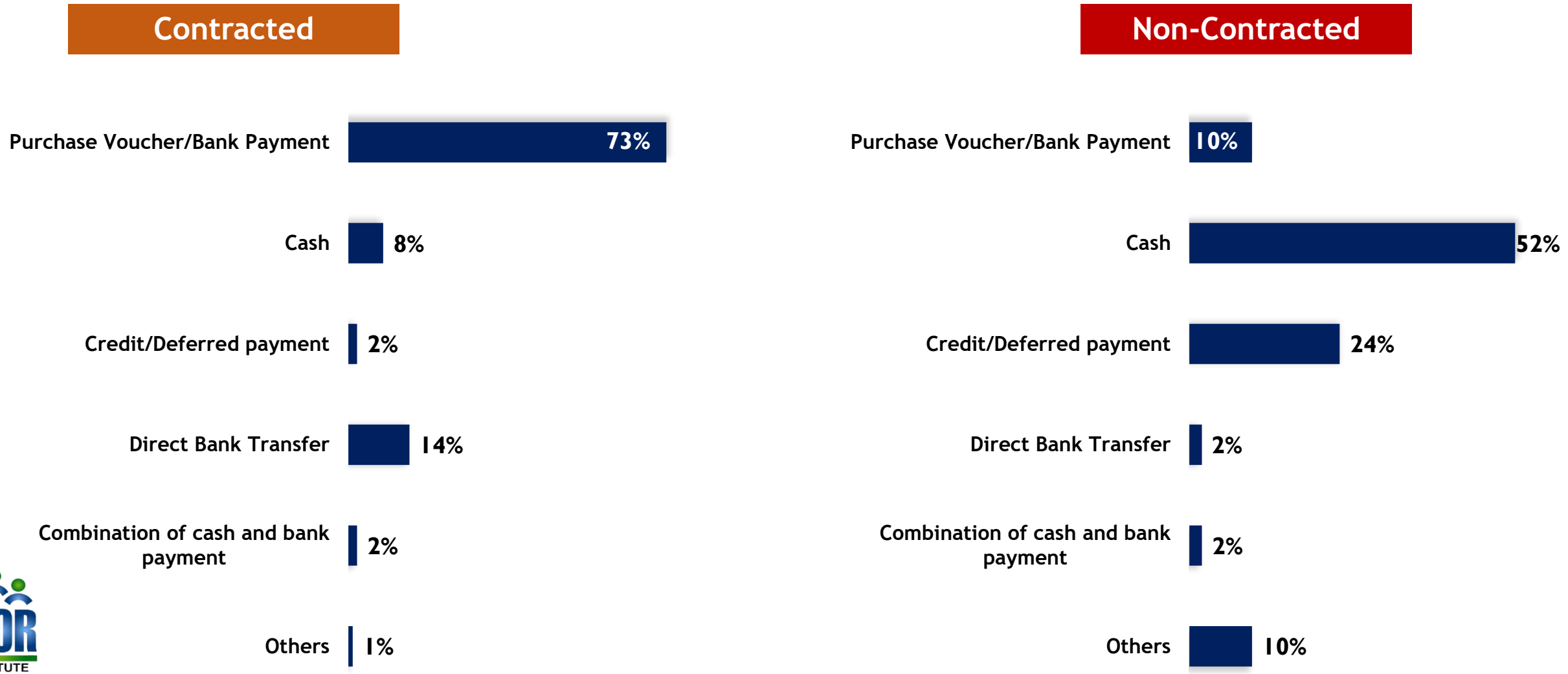


Were you satisfied with the grading of your tobacco?



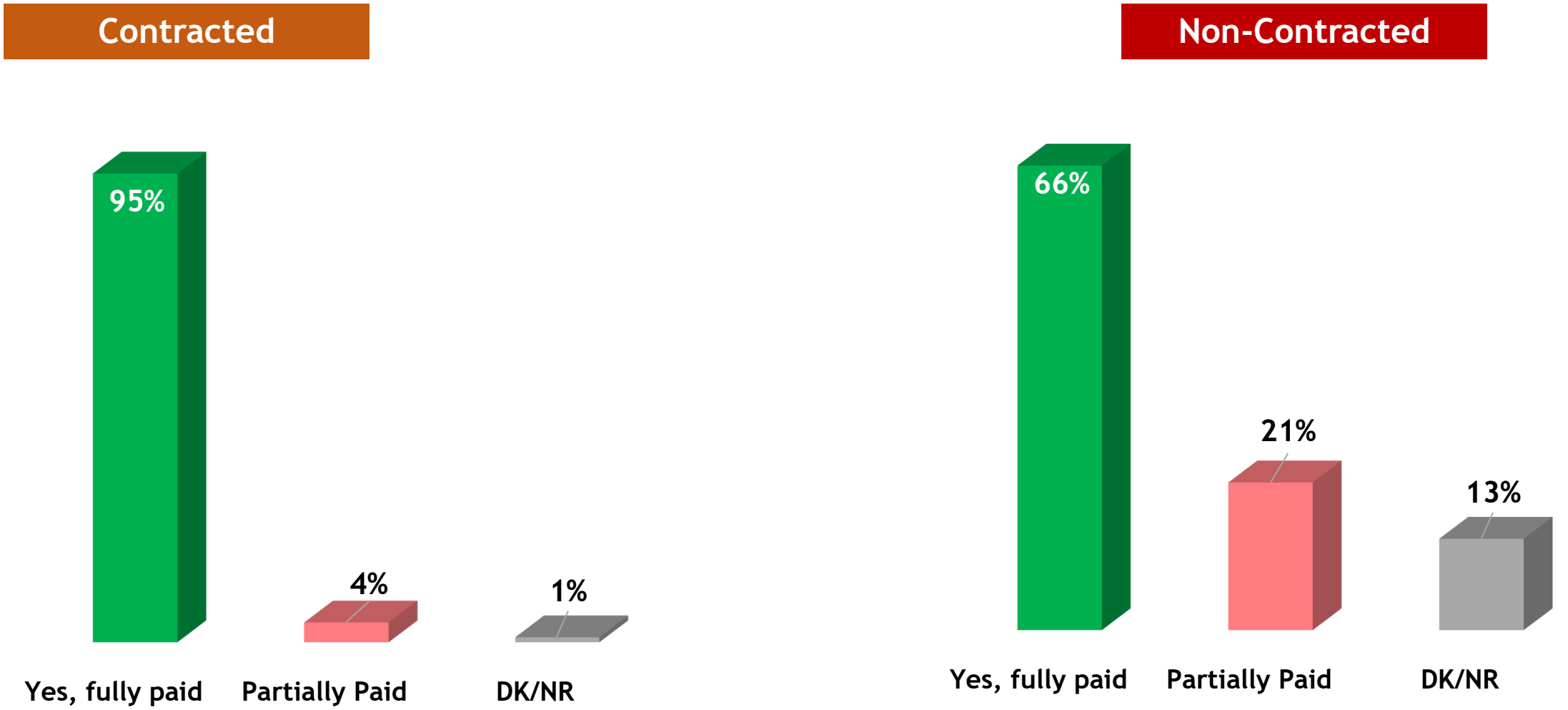
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How did you receive payment for your tobacco?
Contracted Vs. Non-Contracted



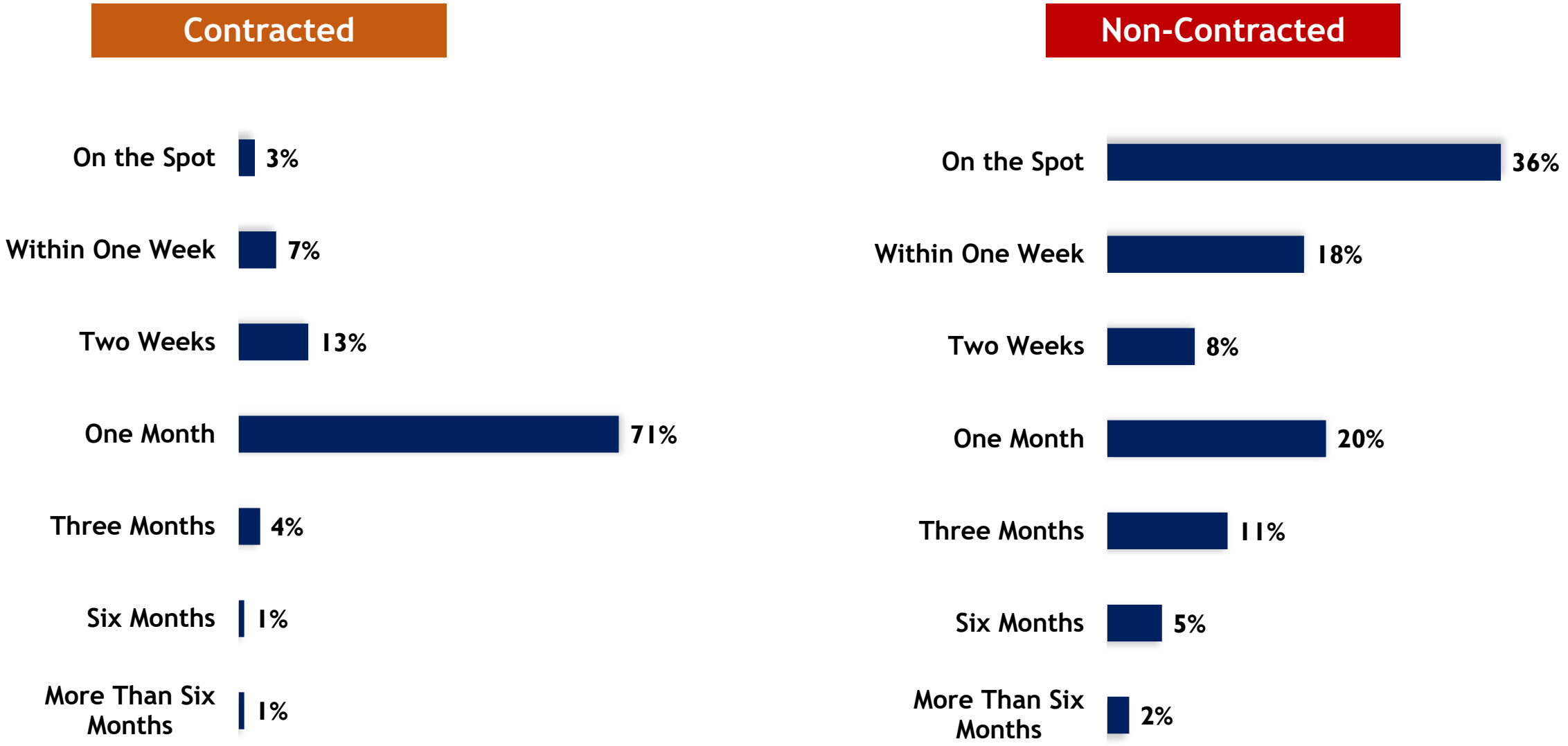
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Did you receive the full payment for tobacco that you had already sold?
Contracted Vs. Non-Contracted



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Approximately how many days after the sale did you receive payment?
Contracted Vs. Non-Contracted



SECTION 5

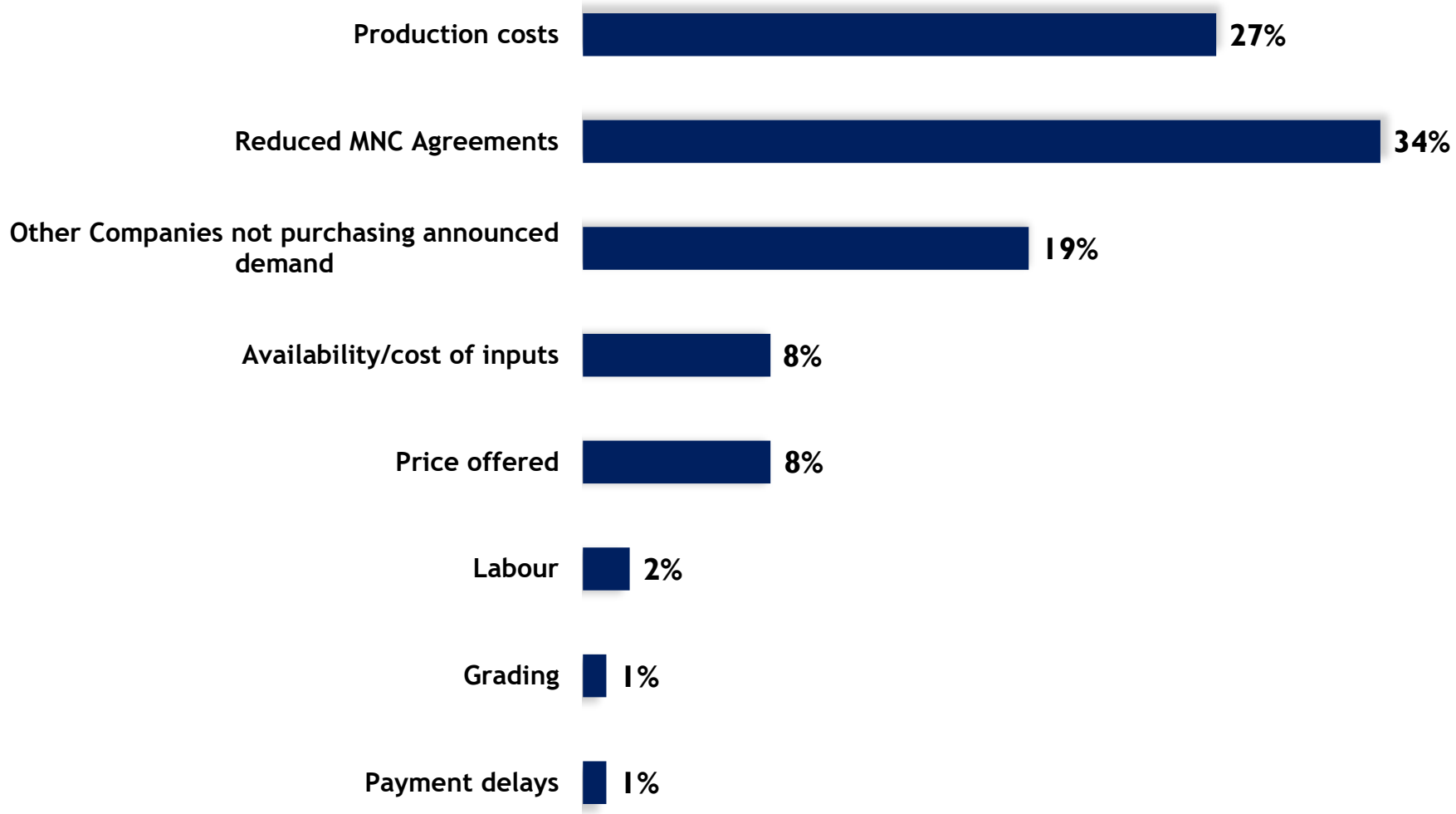
FARMER EXPERIENCE & CHALLENGES



- Experience with Buyers
- Production Challenges
- Key Constraints and Suggestions

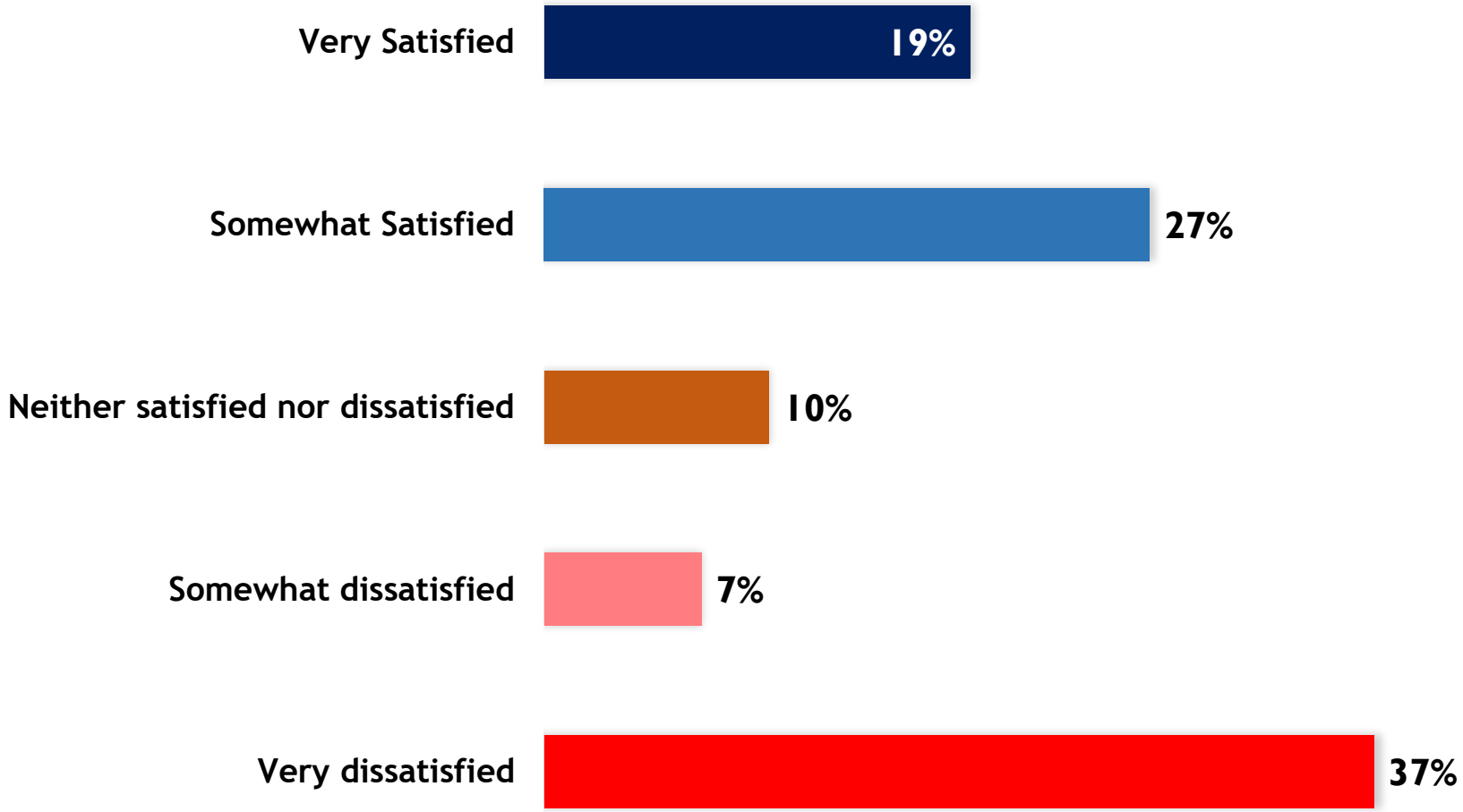
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What is the biggest challenge you face in producing and selling FCV tobacco?



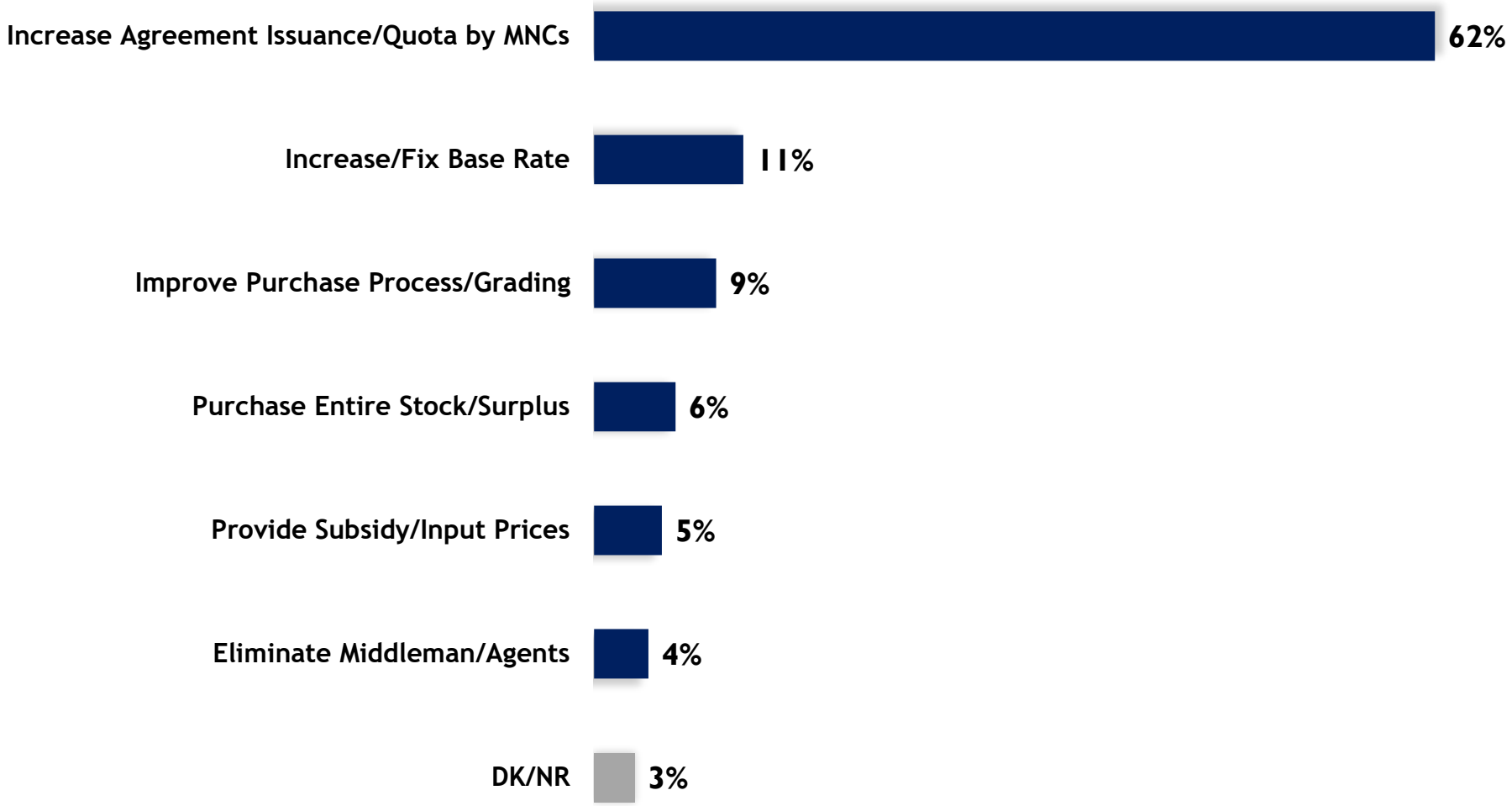
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Overall, how satisfied are you with the current tobacco purchasing system?



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What one change would most improve the tobacco purchasing system for farmers?



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KEY FINDINGS | FCV TOBACCO FARMERS

PKR 720/kg

Average price from MNC buyers

Compared with PKR 559 other companies and PKR 471 other buyers.

62%

Want more agreements / higher quotas from MNCs

Most frequently suggested improvement to purchasing system.

45%

Had no written agreement before planting

55% had written purchasing agreement.

Important Suggestion: The suggested improvement was to enhance compliance of PTB laws.

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Survey Snapshot




















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Thank You!

IPOR
Office #1-4, 2nd Floor, Soan Complex, Soan Gardens,
Islamabad Express Way,
Islamabad, 44000, Pakistan
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