

The State of Premium Handmade Cigars & Dark Tobacco (2025)

Global Production, Trade, and Market Outlook for Premium Handmade Cigars

September 2025

By Philip G. Wynne

Founder, Felipe Gregorio Cigars

Executive Summary

Key Insights at a Glance:

- U.S. remains the volume anchor: ~430M handmade imports in 2024 (+27% since 2019).
- China is now the #1 value market for Cuban Habanos: global sales US\$827M in 2024.
- Wrapper leaf supply is the critical bottleneck: Ecuador, Mexico, Cameroon, Indonesia.
- Global premium cigar value projected to grow at 5–7% CAGR through 2030.
- New terroirs likely to emerge, echoing the globalization of wine.

Abstract

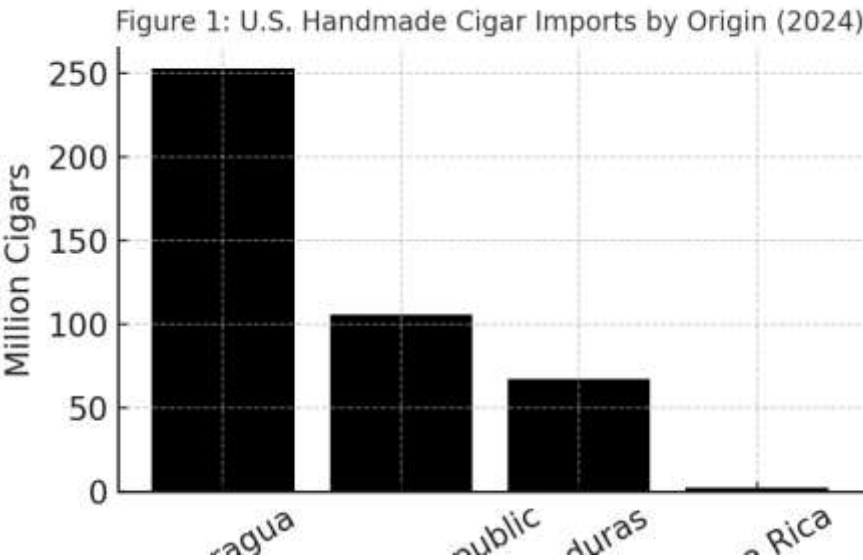
This report examines global production, trade, and consumption of premium handmade cigars and the dark tobaccos used in their manufacture. In 2024, U.S. imports reached approximately 430 million handmade cigars, up nearly 27% since 2019. Globally, Cuban Habanos sales hit a record US\$827 million, with China emerging as the top market. The analysis highlights production geographies, supply constraints in wrapper leaf, and provides projections through 2030.

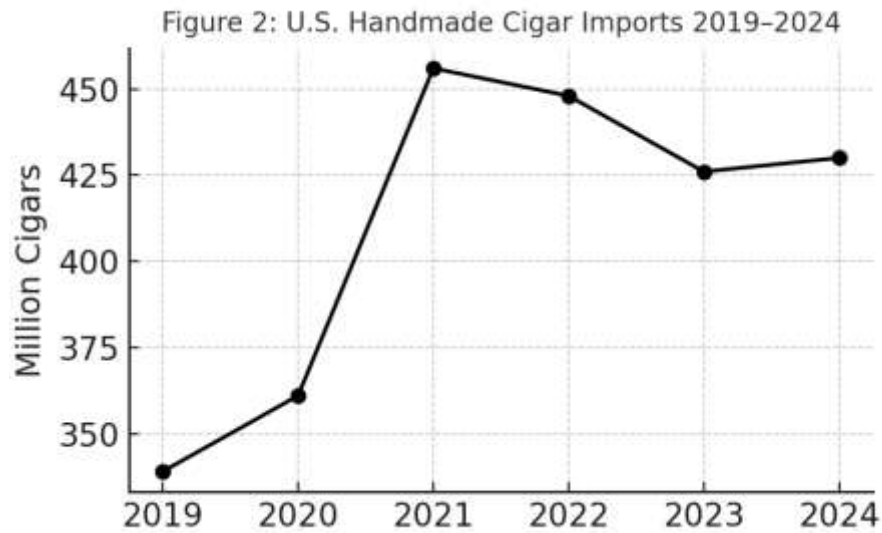
1. Introduction

Premium handmade cigars represent a resilient luxury niche within the broader tobacco sector. Unlike mass-market machine-made cigars, handmade products depend on artisanal skill, long-aged tobaccos, and terroir-specific qualities. This report explores the state of the industry in 2025, focusing on production geographies, global trade flows, agronomy of dark tobaccos, and future outlook.

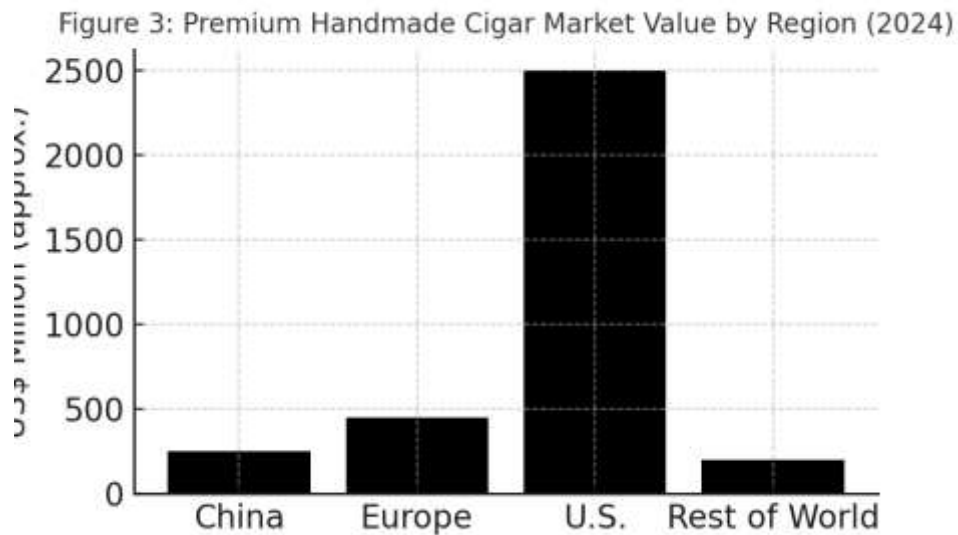
2. Global Demand & Trade

The United States remains the largest volume market for premium handmade cigars. Imports in 2024 reached 430.03 million sticks, a 0.9% increase over 2023 and a 27% rise since 2019. Market share by origin in 2024: Nicaragua 58.8%, Dominican Republic 24.7%, Honduras 15.7%, Costa Rica 0.6%.



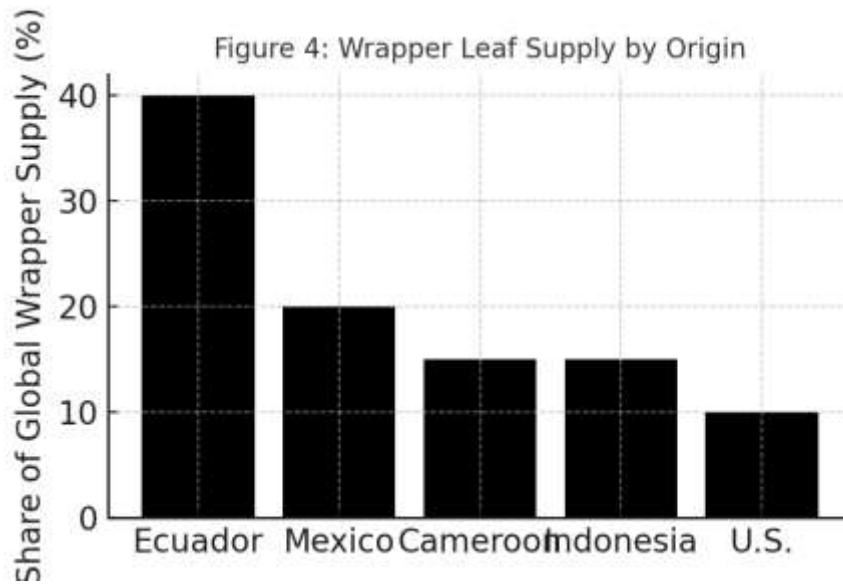


Globally, Cuban Habanos reported US\$827 million in sales in 2024, a record driven largely by China, Spain, Switzerland, the U.K., and Germany. China is now the #1 value market for Cuban cigars. The U.S. remains the largest market overall for non-Cuban premium handmade cigars, worth an estimated US\$2.5 billion retail.



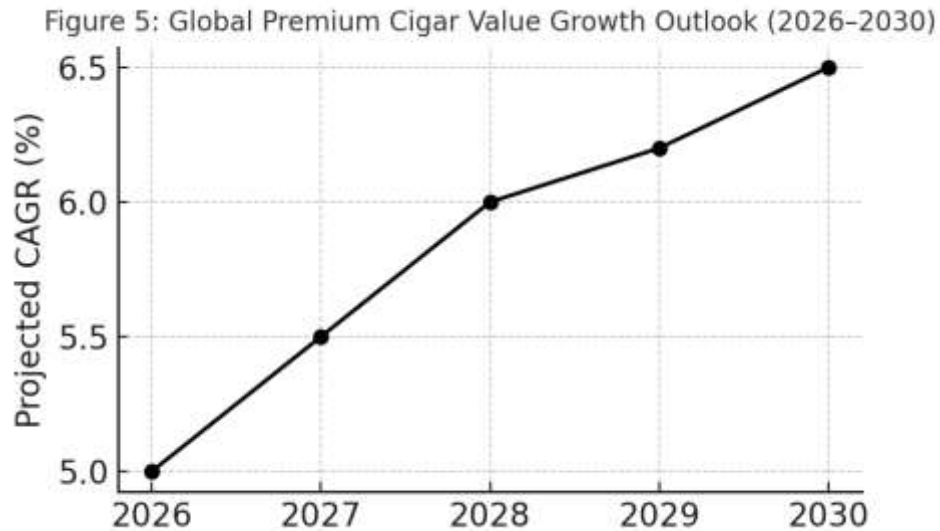
3. Production & Supply Regions

Nicaragua, the Dominican Republic, and Honduras dominate premium handmade cigar production for the U.S. market, accounting for ~99% of imports. Cuba, while excluded from the U.S. market, remains globally significant through Habanos S.A. Secondary producers include Mexico, Brazil, Costa Rica, and boutique makers in the U.S., Philippines, and China.



4. Global Trends & Outlook

Premium handmade cigars continue to show value growth outpacing volume. The U.S. provides volume stability, China drives luxury value, and Europe faces regulatory headwinds. Supply remains constrained by wrapper availability and climate risks.



5. Conclusion

Premium handmade cigars remain an artisanal trade, supporting rural economies and cultural traditions. As traditional growing areas face urbanization and climate pressures, new regions will likely emerge as sources of dark tobacco. The long-term outlook remains positive, with value growth projected at 5–7% CAGR through 2030.

References

- Habanos S.A. Annual Sales Reports (2024).
- Halfwheel Cigar Import Report (2024).
- USDA/NASS Dark Tobacco Data (2023–2024).
- FAO Tobacco Production Data.
- Grand View Research (China Luxury Cigar Market).
- Fact.MR (Global Cigar Market Outlook).

Appendix (Concise Data)

U.S. Handmade Cigar Imports 2024: Nicaragua 253.1M (58.8%), Dominican Republic 106.0M (24.7%), Honduras 67.4M (15.7%), Costa Rica 2.5M (0.6%).

Cuban Habanos Sales 2024: US\$827M; top markets China, Spain, Switzerland, U.K., Germany.

EU Raw Tobacco Production: <2% of world; dependence on imports from Ecuador, Mexico, Cameroon, Indonesia.

Global Outlook 2026–2030: +5–7% CAGR value, volume stable; U.S. volume anchor, China/Asia value anchor.

About the Author

Philip G. Wynne has been a premium cigar maker and grower for more than 35 years. He created world-renowned boutique cigar brands such as Petrus and Felipe Gregorio, and has maintained growing operations across Honduras, Nicaragua, Costa Rica, and Ecuador.

Throughout his career, Wynne has explored and experimented with unique single-origin tobaccos, believing they contribute to the individuality of cigar blends. In the 1990s, he incorporated Perique tobacco from Louisiana and Andullo from the Dominican Republic into his blends. In 2008, he launched the Moroccan Series, introducing tobaccos from Essaouira and Imichil.

Wynne continues to innovate in the premium cigar world, seeing parallels with the global wine industry, which expanded from its European roots to production worldwide. He envisions a future where premium cigars follow a similar trajectory, embracing new terroirs and broadening the horizons of cigar making.