analyst ink LLC

INDUSTRY ANALYSIS

AUGUST 2026

BOUTIQUE WITHOUT CONSENSUS

Scale, Craft, Identity, and the Overextension of "Boutique" in the Premium Cigar Industry

An assessment of how the word boutique evolved from useful market shorthand into an overloaded and contested classification shaped by scale, identity, authority, access, perception, and operating reality in the modern premium cigar industry.

Hector J. Alfonso Sr.

- SIGNAL VS. STRUCTURE
- MARKET SEGMENT SIGNALS
- BOUTIQUE VORTEX
- CATEGORY INSTABILITY
- PRINCIPAL DIRECTION
- PERCEPTION VS. REALITY
- OUTLIER CASES

EXECUTIVE SUMMARY

This paper began with a simple question: what does the premium cigar industry actually mean when it calls a company, brand, factory, or cigar “boutique”? What came back was not one stable industry definition, but several overlapping measurements that the industry routinely compresses into the same word: scale, process, control, independence, authorship, culture, distribution, restraint, visibility, and market perception. That disagreement became the starting point of the analysis, not the end of it.

Boutique still carries cultural and commercial force. Retailers use it to organize discovery. Consumers use it as shorthand for intimacy, personality, scarcity, craftsmanship, or difference. Manufacturers use it, reject it, qualify it, or redefine it according to the operating reality they know best. The problem begins when that useful shorthand is treated as though every user is describing the same structure.

The investigation developed in stages. Market behavior showed that many companies associated with the boutique era had moved from the fringe toward the center of premium-cigar visibility. The first twelve manufacturers I contacted then became a working baseline against which later answers could be compared. Retailers, media and community voices, and wholesale and distribution operators tested the same language from different positions in the business. The manufacturer field then widened, and twenty questions were used to separate the issues the single word boutique had been carrying.

I came away with two conclusions. The premium cigar industry does not possess one consensus definition of boutique, but the record supports a definition I am willing to defend. At the company or brand level, boutique requires four conditions to remain materially present: a recognizable Identity grounded in authorship, purpose, or specialization; Operations that preserve meaningful discretion over consequential decisions; Production and Control with identifiable authority and accountability over the cigar; and Market Perception and Access that correspond to something genuine about the enterprise rather than presentation alone. Size, ownership, factory arrangement, distribution, visibility, scarcity, and legacy status can all influence the answer, but none settles it by itself. At the cigar or production level, the same underlying characteristics can apply to a specific project even when the parent company does not qualify. Boutique does not automatically travel from company to cigar or from cigar to company.

The Boutique Vortex appears late in the paper as an interpretive model, not a certification system. It organizes those same four areas and shows how growth, ownership, infrastructure, production relationships, access, visibility, scarcity, and market expectations can strengthen, weaken, or separate them. The definition identifies the conditions I require. The Vortex shows what happens to those conditions under pressure.

Nothing here argues that larger is better, smaller is better, or that boutique is dead. Nor am I claiming that the industry has reached consensus. I am arguing for a more demanding use of the word. The industry still has no single definition; the record gave me enough to state mine and enough to explain why reasonable disagreement will remain at the edges.

CONTENTS

EXECUTIVE SUMMARY 1
PREFACE 4
PART I — THE TERM AND ITS INSTABILITY 6
CHAPTER 1 — BACKGROUND 6
CHAPTER 2 — COMPETING INTERPRETATIONS 6
CHAPTER 3 — WHY THE TERM NEVER STABILIZED 6
CHAPTER 4 — WHAT COUNTS AS EVIDENCE 8
CHAPTER 5 — A NOTE ON CUBAN CIGARS 8
PART II — THE MARKET CHANGED 11
CHAPTER 6 — THE TRADE SHOW TEST 11
CHAPTER 7 — RANKINGS AND CONSENSUS 11
CHAPTER 8 — FROM THE FRINGE TO THE CENTER 12
CHAPTER 9 — THE NEW CIGAR COMMUNITY 13
CHAPTER 10 — THE HUMIDOR CHANGED TOO 13
CHAPTER 11 — FROM PURCHASE TO PARTICIPATION 14
CHAPTER 12 — THE CUSTOMER ATTACHMENT AND ROLE-CONVERSION PATHWAY 14
CHAPTER 13 — WHEN IDENTITY OUTLASTS STRUCTURE 20
CHAPTER 14 — THE WORD STARTS TO STRETCH 20
PART III — WIDENING THE FIELD 21
CHAPTER 15 — THESE WERE MY TWELVE 21
CHAPTER 16 — FOUR SECTORS EMERGE 22
CHAPTER 17 — WHEN THE SECTORS BREAK APART 23
CHAPTER 18 — WHAT THE FIRST TWELVE ESTABLISHED 24
CHAPTER 19 — THE RETAILERS 24
CHAPTER 20 — THE HUMIDOR TEST 27
CHAPTER 21 — MEDIA, COMMUNITY, AND THE MEANING OF DISCOVERY 32
CHAPTER 22 — DISTRIBUTION AND THE DURABILITY TEST 35
CHAPTER 23 — THREE ROOMS, ONE WORD 38
CHAPTER 24 — MAKING THE ROOM BIGGER 40
PART IV — TWENTY QUESTIONS FOR THE MANUFACTURERS 42
ACT I — WHAT ARE WE EVEN TALKING ABOUT? 42
CHAPTER 25 — QUESTION 1 — WHAT IS BOUTIQUE SUPPOSED TO MEASURE? 42
CHAPTER 26 — QUESTION 2 — HAS BOUTIQUE EVER MEANT THE SAME THING? 44
CHAPTER 27 — QUESTION 3 — WHO GETS TO DECIDE WHAT IS BOUTIQUE? 46
CHAPTER 28 — QUESTION 4 — CAN SIZE DEFINE BOUTIQUE? 47
CHAPTER 29 — QUESTION 5 — IS BOUTIQUE A STAGE OR A BUSINESS MODEL? 50
ACT II — WHAT EXACTLY ARE WE CLASSIFYING? 53
CHAPTER 30 — QUESTION 6 — ARE WE CLASSIFYING THE COMPANY OR THE CIGAR? 53
CHAPTER 31 — QUESTION 7 — CAN THE SAME FACTORY MAKE BOTH A BOUTIQUE AND A NON-BOUTIQUE CIGAR? 54
CHAPTER 32 — QUESTION 8 — WHERE DOES CONTROL OF THE CIGAR ACTUALLY LIVE? 56

CHAPTER 33 — QUESTION 9 — DOES BOUTIQUE REQUIRE INDEPENDENCE? 57
CHAPTER 34 — QUESTION 10 — CAN SOMETHING BE BOUTIQUE IF IT IS EVERYWHERE? 59
ACT III — DOES THE LABEL ACTUALLY TELL US ANYTHING ABOUT QUALITY OR CRAFT? 61
CHAPTER 35 — QUESTION 11 — IS BOUTIQUE ACTUALLY DIFFERENT FROM PREMIUM? 61
CHAPTER 36 — QUESTION 12 — DOES SMALLNESS TELL US ANYTHING ABOUT QUALITY? 63
CHAPTER 37 — QUESTION 13 — CAN SCALE AND INFRASTRUCTURE STRENGTHEN CRAFT? 65
ACT IV — MAYBE BOUTIQUE ISN'T ABOUT SIZE AT ALL 67
CHAPTER 38 — QUESTION 14 — DOES BOUTIQUE REQUIRE RISK? 67
CHAPTER 39 — QUESTION 15 — IS BOUTIQUE A CULTURAL IDENTITY? 68
CHAPTER 40 — QUESTION 16 — DOES BOUTIQUE REQUIRE RESTRAINT? 70
ACT V — WHAT HAPPENED TO THE WORD? 73
CHAPTER 41 — QUESTION 17 — WHAT DOES THE BOUTIQUE LABEL ACTUALLY DO? 73
CHAPTER 42 — QUESTION 18 — WHEN DOES BOUTIQUE BECOME MARKETING? 75
CHAPTER 43 — QUESTION 19 — WHAT DO SMOKERS GET WRONG ABOUT BOUTIQUE? 78
ACT VI — WHAT REMAINS WITHOUT THE WORD 82
CHAPTER 44 — QUESTION 20 — WHAT REMAINS WHEN THE WORD BOUTIQUE IS REMOVED? 82
PART V — SYNTHESIS: WHAT THE MANUFACTURER RECORD ACTUALLY SHOWS 88
CHAPTER 45 — SO, LET US DEFINE BOUTIQUE 88
CHAPTER 46 — THE MANUFACTURER AGREEMENT AND DIVISION MATRIX 90
CHAPTER 47 — THE COST OF IMPRECISION 92
PART VI — THE BOUTIQUE VORTEX 94
CHAPTER 48 — FROM DEFINITION TO PRESSURE 94
CHAPTER 49 — THE BOUTIQUE VORTEX 94
CHAPTER 50 — THE BOUTIQUE INTERACTION MAP 96
CHAPTER 51 — THE BOUTIQUE PRESSURE MAP 99
CHAPTER 52 — THE OUTLIERS: WHERE THE SYSTEMS STOP MOVING TOGETHER 101
PART VII — TESTING THE ARGUMENT 106
CHAPTER 53 — COUNTERARGUMENTS 106
CHAPTER 54 — SELF-AUDIT 108
CHAPTER 55 — FINAL FINDINGS 110
ACKNOWLEDGEMENTS 114
CONTRIBUTORS 115
SOURCES 117
INDEX 120

PREFACE

One lesson I learned during more than three decades in law enforcement is that some of the most persistent arguments are not disagreements about facts. They are disagreements about categories. Investigators may agree on what happened and still disagree over what to call it. The facts remain largely unchanged while the argument moves to the label.

The premium cigar industry behaves the same way. Terms such as boutique, craft, small company, large company, legacy brand, influencer, media, and even premium are used constantly. Most people understand the signal those words are supposed to send. Agreement becomes harder when somebody asks where the boundaries actually begin and end. I think of them as consensus labels: terms that achieve broad recognition without achieving broad agreement.

Boutique became the clearest example. Manufacturers use it. Retailers use it. Media use it. Consumers use it. Awards, rankings, buying guides, launch coverage, and ordinary cigar conversation rely on it. Yet the closer I looked, the less agreement I found over what qualifies a company as boutique, what disqualifies it, and whether the word is even classifying the same thing from one conversation to the next.

I came to the subject as a structurally rigid analyst entering a culturally elastic category. That tension shaped the work. I did not begin by trying to abolish boutique or impose a definition of my own. I wanted to know why the word remained useful, where it still described something real, and where it began carrying more structural weight than the evidence could support. The record eventually pushed me farther than I expected. After separating the variables and testing the disagreements, I was willing to state the definition I believe the evidence can support.

HOW THIS PAPER IS ORGANIZED

The paper is organized as an investigation. Part I examines the term and the long failure to stabilize its boundaries. Part II leaves definitions behind and watches the market behave. Part III turns to the contributor record, beginning with the twelve people I approached first, then widening through retail, media, community, wholesale, and distribution. Part IV gives the expanded manufacturer record twenty separate questions in six acts. Part V synthesizes what that testimony actually established. Part VI introduces the Boutique Vortex and returns to the cases that resisted a simple definition. Part VII challenges the argument through counterarguments and a self-audit before the final findings.

The sequence matters. The first twelve were not selected because they were the twelve most important people in premium cigars. They were the people closest to my own path through the industry or people and companies with whom I felt a connection. Their answers became the baseline. The later field was deliberately broader and more difficult. The purpose was not to accumulate votes. It was to see whether the original disagreements survived when the room became much larger.

A NOTE ON METHOD

The study is intentionally expansive rather than statistically representative. Its length is deliberate. Collecting this range of voices was itself a significant part of the work, and reducing that testimony too aggressively would have diminished one of the study's central values. The contributor record is not simply supporting material for the analysis. It is part of the substance of the study.

A shorter treatment would have been easier to read, but it would also have required the reader to accept more of the analysis without seeing enough of the underlying disagreement. This study makes a different trade. It sacrifices brevity and speed in order to give readers greater access to the range of opinions that produced the conclusions. The intention is not merely to tell the reader that the industry disagrees, but to allow the reader to see that disagreement, compare the different positions, and judge the weight of those views independently.

For that reason, the participation of the contributors and the analysis built around their testimony are treated as having comparable value. The analysis organizes, compares, and tests the evidence, but the contributor record gives the reader direct access to the people whose experience, judgments, distinctions, and contradictions make the subject worth examining in the first place. The size of the study reflects that choice.

THE CENTRAL QUESTION

This paper begins with the term “boutique,” but the real question is not whether the premium cigar industry still uses it. It plainly does. The question is whether the evidence can separate the characteristics hidden inside the word well enough to support a defensible definition without pretending the industry has reached consensus.

PART I
THE TERM AND ITS INSTABILITY

CHAPTER 1
BACKGROUND

Like many useful conversations in this business, this one started over coffee before the trade show. What begins as "How's the show so far?" or "Did you try anything special?" sometimes turns into something more valuable.

The question did not fully land until the second day, when someone media-adjacent casually said, "Look at all the boutiques in the front row." That was the moment the term split.

"Boutique" entered the premium cigar conversation as shorthand for a specific kind of company. It suggested smaller production, limited distribution, founder proximity, direct involvement, and a position slightly outside the established system. It carried more than size. It carried identity.

Like Bohemians, Beatniks, punks, and other groups that needed language to separate themselves from the mainstream, the term gave those companies a place to stand. It told the market they were not legacy houses, not institutional brands, and not trying to be either. The distinction felt relatively clear: companies operating with fewer layers, closer authorship, narrower reach, and a different relationship to the consumer than the established houses surrounding them.

That earlier clarity is what made the trade-show comment so useful. If "boutique" could now describe companies occupying some of the most visible and commercially established positions in the room, then the issue was no longer whether the term had history. The issue was whether its earlier boundaries still matched the market still using it.

CHAPTER 2
COMPETING INTERPRETATIONS

One of the first problems in this paper was that "boutique" rarely entered the conversation with a stable meaning attached. People used the term confidently. They simply did not use it consistently.

For some contributors, boutique still referred primarily to scale: smaller production, narrower distribution, tighter operational footprints, emerging-company status. For others, it had shifted toward identity, founder visibility, authorship, personality, accessibility, and the perception that a company still felt direct or personally driven regardless of how large it became. Others tied boutique more closely to process, autonomy, positioning, or consumer perception. Those interpretations were not random. They reflected different ways of measuring the same category. That became the first major point of instability: the industry was not simply disagreeing over one definition. It was applying different measurement systems while continuing to use one term.

CHAPTER 3
WHY THE TERM NEVER STABILIZED

Twenty-five years of public attempts to define boutique produced production caps, ownership tests, identity arguments, quality assumptions, and no lasting consensus. Cigar media, retailers, trade organizations, and industry writers repeatedly tried to organize the category through formal or semi-formal definitions, but the results never fully converged.

As early as 1999, *SMOKE Magazine* cited a working definition describing boutique companies as manufacturers producing fewer than 1.5 million cigars annually. That threshold was later referenced in *Halfwheel's* 2013 editorial *Boutiques*, which also noted that the term was already unclear and being used in multiple ways [1].

By 2012, *Cigar Coop* observed that the definition could be sliced and diced many different ways and that there was simply not a precise definition [2].

In 2015, the host of The Cigar Authority asked, "What Exactly Is a Boutique Cigar?" and reached a similar conclusion: some defined it through production under one million cigars, others through limited quantity, smaller factories, or independent ownership, but no single standard held consistently [3].

Halfwheel later reported that the Boutique Cigar Association attempted to formalize the category by defining boutique companies as those producing fewer than 500,000 cigars annually [4]. The association gave boutique one of its clearest institutional tests, but that production-cap model never became the settled organizing standard for the broader market. The association later ended its non-profit status and moved toward a social community platform [5].

Elsewhere, definitions expanded rather than narrowed. *Tobacco Business* reported that boutique could refer to production numbers, distribution size, or portfolio scope, while retailer interviews widened the category further to include small upstart companies, independent ownership, small-batch intent, passion-driven production, and distinctive identity [6]. *Stogie Press* approached the term through owner involvement across the entire process, from tobacco selection through marketing, while other sources shifted emphasis toward construction quality, tobacco selection, craftsmanship, and small-batch experimentation [7][8].

The contradictions continued across the broader market. *Cigars.com* alternately described boutique through production thresholds, quality focus, and the acknowledgment that the category has no set definition [9]. *Cigar Dojo* tied the concept to smaller independent companies producing limited-run cigars while acknowledging that scale and independence were related, but not identical, ideas [10].

Direct contradictions eventually appeared within the same publication. *Tobacco Business* presented competing interpretations in separate interviews: Claudio Sgroi framed boutique through manufacturing precision and consistency, while **Skip Martin, Co-Founder of RoMa Craft Tobac,** rejected the term altogether as an outdated distinction no longer reflecting modern production realities [11]. Earlier cultural coverage complicated the issue further: *Tobacco Business* and *Cigar Press* both treated boutique partly as a generational and cultural movement tied to outsider founders, nontraditional brand identity, and companies that could grow far beyond their original scale while retaining an alternative identity [12][14].

Cigar Inspector described boutique cigars as limited production, independently owned cigar companies, while also framing the category through singular authorship: cigars made in the image of a singular person, with a singular point of view [13]. *Cigar Aficionado* used the word differently in its 1997 interview with **Ernesto Pérez-Carrillo, Founder of Casa Carrillo,** contrasting his Miami operation, described as almost a boutique operation, with the commercial-scale Dominican factory created during La Gloria Cubana's expansion [15]. Even within published sources, boutique could mean ownership and authorship in one context and operating scale in another.

Depending on the source, boutique could describe production volume, distribution reach, company size, ownership structure, process discipline, product philosophy, scarcity, founder involvement, market positioning, consumer perception, or identity itself. The definitions did not converge over time; they accumulated. That instability matters because the term kept performing real market work the entire time. Boutique still shaped consumer expectation, retailer positioning, media framing, and growth narratives even when the conditions underneath the label varied substantially.

THE BOUTIQUE CIGAR ASSOCIATION

The Boutique Cigar Association matters here because it represents one of the clearest formal attempts to organize the category around a measurable production threshold. By limiting membership through annual production volume, it gave boutique an institutional framework rather than leaving it entirely to market habit, media language, or consumer interpretation. That effort remains historically important even though the broader market never settled around its production cap.

The association's formal dissolution in late 2025 should not be overstated as proof that this framework failed. Public explanations for the closure pointed toward the limitations of a volunteer board and individual business pressures, with leadership ultimately urging members to unite behind larger national trade associations [5][19]. The safer conclusion is that the BCA's production-cap model never became the settled organizing standard for the broader premium cigar market.

CHAPTER 4
WHAT COUNTS AS EVIDENCE

This paper also encountered a considerable amount of retailer-driven, affiliate-driven, influencer-adjacent, and sales-oriented material discussing boutique cigars through promotional language, discovery framing, bundle marketing, and "best boutique cigars" lists.

Those sources reflected legitimate consumer-facing use of the term, but they served a different purpose. Much of that material used boutique as retail shorthand signaling curiosity, selectivity, exclusivity, scarcity, or discovery. That works in a humidor, a buying guide, or a promotional post. It becomes less useful once the objective shifts from product discovery to determining whether the category still separates operating realities with meaningful consistency. This paper does not present a formal consumer survey. Consumer behavior is examined through retailer observations, media ecosystems, community visibility, event culture, release pursuit, social participation, and observable market behavior. The analysis is therefore behavioral and comparative rather than quantitative.

The same caution applied to forum discussions and fragmented social media debates. Those spaces can produce useful observations, but the signal-to-noise ratio deteriorates quickly, and definitions often become circular, individualized, emotionally defended, and increasingly detached from measurable business distinctions.

CHAPTER 5
A NOTE ON CUBAN CIGARS

While reviewing the early definitions, I was asked a reasonable question: "Cuban cigars are scarce, difficult to obtain, and encountered in limited quantities, particularly by American consumers. Why would they not be considered boutique?"

The question is useful because it shows how easily one attractive characteristic can take over the entire category. Scarcity may contribute to boutique perception, but scarcity alone tells us very little about independence, authorship, production authority, specialization, or the relationship between the people responsible for the cigar and the market around it.

My answer is no. I would not classify Cuban cigars as boutique simply because access to them may be restricted or quantities may appear limited. Scarcity created by law, geography, allocation, distribution, or political circumstance is different from scarcity created through deliberate production restraint, tobacco availability, specialization, or principal-directed control. A cigar can be difficult to obtain without being boutique. Rarity describes availability. It does not explain authorship, production authority, operating structure, or who controls the decisions behind the cigar. And, of course, the commercial importation of Cuban cigars

into the United States remains generally prohibited. That does not move them closer to boutique. It moves them closer to contraband. [17]

Scarcity is only part of the reason Cuban cigars enter this paper. It is impossible to talk about scarcity, exclusivity, and prestige without addressing how the Cuban market practically invented the modern playbook for manufactured market pressure.

One reason Cuban cigars belong in this narrow discussion is that Habanos S.A. has long used structured scarcity as part of its premium-market architecture. Its Ediciones Limitadas have been produced since 2000 in small quantities and unusual formats, while Regional Editions are deliberately restricted to particular territories and presented in numbered boxes. [20] Those programs predate much of today's limited-drop culture and show how scarcity, geography, packaging, and prestige can be engineered together.

The lesson is not that every limited Habanos release is cynical marketing. Some scarcity reflects tobacco, aging, or genuine production limits. The narrower point is that scarcity can be created by release design as well as by operational constraint. Once a large organization can produce exclusivity through format, geography, and allocation, rarity stops being reliable evidence of boutique structure. Modern boutique companies did not invent the psychology of limited access, and the Cuban programs show why scarcity cannot carry the classification by itself.

The same problem appears throughout this paper. Smallness can be mistaken for craftsmanship. Independence can be mistaken for quality. Founder visibility can be mistaken for authority. Limited production can be mistaken for intention. Any one of those characteristics may contribute to the boutique association, but none should be allowed to do the work of all the others.

Rarity is not classification.



Cuban cigars therefore remain outside the classification developed here. I am not going to force individual Cuban brands, factories, or cigars into boutique or non-boutique categories. That resolves the classification question. It does not end Cuba's relevance to the discussion. Its scarcity, prestige, quality, distribution, and possible reentry into the American market test several assumptions attached to the word.

THE CUBAN EXCEPTION

As a rule, I do not seek out Cuban cigars. That decision is personal. It comes from respect for what my parents suffered while leaving the island after a revolution whose promises proved duplicitous. Call that political, emotional, or even hypocritical if you wish. It is still my position.

I have nevertheless been handed Cuban cigars by people in the industry and expected to light one in a shared moment. Refusing would have turned the cigar into a political statement of its own. So I partook. If it was bad, as too many of them have been, I found myself hoping somebody would knock it from my hand and bring the proceedings to a merciful end.

When a Cuban cigar is good, it can be very good. When it is poorly made, plugged, tunneling, canoeing, or otherwise unwilling to cooperate, it can be remarkably bad. The only silver lining is that there is often very little gray area.

The experience can resemble standing at a craps table. Come on, seven. Instead, snake eyes. The cigar tunnels, the draw closes, the burn heads for another zip code, and the pass line is finished. Then, every once in a while, the dice cooperate and something superior appears. It does not happen often enough for me to make seeking them out worthwhile.

I have said before that Cuban-cigar smokers may be the great masochists of the premium-cigar world. Habanos S.A. can sell someone a box, congratulate him on a magnificent purchase, and then explain that the cigars may be ready in five or ten years. Boutique companies, independents, legacy manufacturers, and platform brands do not have that luxury. We cannot ask the consumer's humidor to become our final production department.

As a cigar maker, I believe Cuban cigars are a shadow of what they were twenty-five years ago and, too often, a memory of what they once represented. That is my opinion, informed by the cigars I have smoked and the production standards by which I judge my own work. It is not offered as a statistical finding, and nobody is required to share it.

If the American market ever reopened fully to Cuban cigars, they would not suddenly become boutique. Their established brands, centralized production system, global distribution structure, and institutional history would remain what they were the day before the law changed. Cuba would also face a harder practical question: whether present tobacco supply, consistency, construction, and quality-control capacity could satisfy the demand created by legal American access. Restricted supply may create urgency. It does not create boutique authorship.

ANALYST NOTE

When precision carries legal or regulatory consequences, the industry does not rely on the word "boutique." Regulatory advocacy has centered instead on "premium cigar," a category that can be tied to observable product characteristics such as handmade construction, whole-leaf tobacco, long filler, and traditional production methods. Boutique may carry considerable cultural and commercial meaning, but it depends too heavily on interpreted characteristics such as identity, independence, ownership, scale, market position, proximity, and perception to perform the same job. The industry may understand what boutique is trying to communicate without being able to make the word precise enough to carry legal responsibility.

PART II
THE MARKET CHANGED

CHAPTER 6
THE TRADE SHOW TEST

The trade show provides one of the clearest views of how the category changed because it shows how the market behaves, not merely how it describes itself. Booth location, retailer traffic, media attention, portfolio depth, consumer visibility, and sustained presence all reveal something about where a company sits in the industry.

Booth placement is not proof of boutique status or its opposite. Prominent space can reflect payment, seniority, relationship history, logistics, or simple longevity. It becomes useful only when read beside the rest of the evidence. When the same companies also command retailer traffic, recurring launch attention, broad distribution, established event schedules, and predictable consumer interest, the old outsider picture becomes harder to maintain.

Many companies once discussed primarily as boutique brands now operate as established participants with measurable influence. Retailers monitor their launches. Media outlets track their releases. Consumers anticipate their products. Competitors watch their decisions. Genuinely smaller operations still exist under much narrower conditions, with tighter distribution, smaller production cycles, greater founder dependence, and considerably more exposure to inventory and financial risk.

The trade show does not settle the definition. It establishes the first market contradiction: companies can retain boutique identity long after they stop behaving like fringe participants.

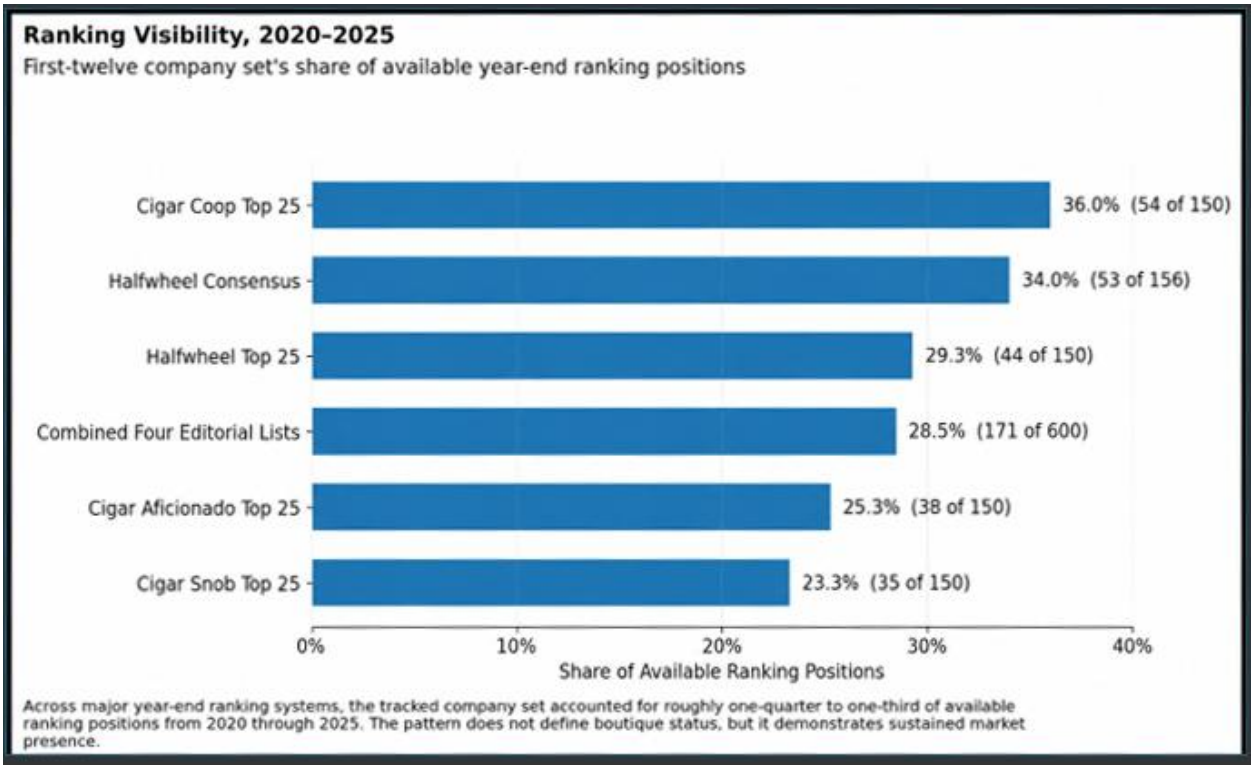
CHAPTER 7
RANKINGS AND CONSENSUS

Year-end cigar rankings provide another way to examine how the market changed. They do not determine whether a company is boutique, and they are not being used here as measures of quality. They are useful because repeated appearances across major ranking systems reveal something narrower and more relevant to this study: sustained visibility.

For this comparison, I tracked the companies associated with the first twelve manufacturers who began the study: Black Label Trading Company / Black Works Studio, Room101, Drew Estate, Espinosa Cigars, Viaje, Illusione, Crowned Heads, Tatuaje, RoMa Craft Tobac, Foundation Cigar Company, Casa Carrillo, and Dunbarton Tobacco & Trust. Where appropriate, closely associated product lines or collaborations were included with the company responsible for them. The purpose was not to argue that these companies occupy identical positions in the market. They clearly do not. The purpose was to see how frequently a group strongly associated with the modern boutique and independent cigar movement continued appearing in major public recognition systems.

The period examined was **2020 through 2025**. For consistency, only the first twenty-five cigars from each annual editorial ranking were counted. That created 150 available positions in each six-year editorial series. Halfwheel's annual Consensus ranking was also examined separately because it aggregates selections from multiple cigar publications and media outlets rather than representing a single editorial staff.

Across those systems, the pattern was difficult to describe as fringe participation.



THE COMPARISON GROUP CHECK

When the broader comparison group is added, the pattern becomes stronger. The combined field accounted for 89 of 150 Cigar Coop positions, approximately 59.3 percent; roughly 63 of 150 Halfwheel Top 25 positions, about 42 percent; and 69 of 150 Cigar Snob positions, approximately 46 percent. Cigar Aficionado remained narrower at 38 of 150, while the Halfwheel Consensus produced 53 of 156. Across the five systems, the companies examined in this paper accounted for approximately 312 of 756 available placements, roughly 41.3 percent.

That does not create a boutique ranking. It demonstrates that much of the population still discussed through boutique, independent, founder-driven, post-boutique, platform, or legacy language now competes inside the center of premium cigar recognition rather than outside it.

ANALYST NOTE

Rankings and aggregate recognition systems are not neutral instruments. Coverage creates familiarity, familiarity creates review opportunity, and repeated coverage can feed year-end lists and consensus systems. The rankings here measure recurring visibility across multiple recognition environments. They do not measure organic consensus by themselves.

CHAPTER 8
FROM THE FRINGE TO THE CENTER

Boutique once carried a strong implication of discovery. The company was smaller, less familiar, harder to find, or operating outside the established center of the business. That condition still exists, but it no longer describes every company carrying the label.

Trade-show presence, rankings, retailer familiarity, recurring launches, broad distribution, media coverage, and consumer expectation accumulate. Over time they create market gravity. A company can remain independent,

founder-driven, highly personal, and creatively distinctive while also becoming a normal part of the industry's center.

Moving toward the center does not mean becoming corporate, losing craft, or making worse cigars. It means the old equation between boutique and fringe position can no longer be assumed. Market location changed even when identity did not.

CHAPTER 9
THE NEW CIGAR COMMUNITY

The modern cigar community developed inside an unusual communication environment. Tobacco companies face advertising restrictions, reduced platform visibility, inconsistent moderation, and limited access to ordinary digital promotion. The industry adapted by building decentralized networks around lounges, events, podcasts, livestreams, retailer media, social groups, factory visits, and direct interaction.

Cigar Dojo is useful as one example because it behaves less like a conventional review publication than a virtual cigar lounge. Consumers post what they are smoking, follow releases, discuss products in real time, join live programming, and interact with other smokers and industry personalities. That activity measures something different from a ranking: recurring engagement, familiarity, founder recognition, release anticipation, and cultural durability.

Retailer podcasts and lounge-driven media expanded the same ecosystem. They project the personality of the store and its community far beyond the physical humidor. Manufacturers, retailers, reviewers, podcasters, and consumers now reinforce visibility simultaneously. That creates a market in which participation can produce recognition before a customer ever sees the box on a shelf.

CHAPTER 10
THE HUMIDOR CHANGED TOO

The evolution is also visible inside the humidor. Earlier boutique brands often depended on scarcity, selective placement, word of mouth, and the pleasure of finding something unfamiliar. Many operated with narrow distribution, inconsistent retailer access, limited production depth, and uncertain shelf presence.

Portions of that population matured. Companies still associated with boutique identity now maintain recurring national retail presence, dedicated humidor space, sustained event schedules, retailer partnerships, repeat release cycles, branded merchandise, and reliable consumer recognition across multiple markets.

Humidor presence is not merely logistical. It reflects retailer confidence, inventory commitment, consumer demand, reorder behavior, relationship depth, and the expectation that the cigar will move. Once a company becomes deeply embedded in that environment, the old distinction between discovery brand and established brand becomes harder to sustain, even when consumers still experience the company as personal or boutique.

Being easier to find did not necessarily make the relationship less personal. The more important change was what happened after the cigar left the humidor. Purchase increasingly became only the beginning of the consumer's relationship with the company.

CHAPTER 11
FROM PURCHASE TO PARTICIPATION

Premium cigar consumption is no longer limited to purchasing, smoking, and developing preferences. For many consumers, the activity expands into lounges, events, social communities, podcasts, livestreams, release tracking, branded merchandise, factory visits, retailer culture, and direct interaction with the people behind the product.

That changes the relationship between scale and intimacy. Broader distribution or greater visibility does not necessarily weaken attachment. In some cases, it gives consumers more ways to participate, and the relationship becomes stronger as the company grows.

The consumer can therefore remain emotionally close to a company whose operating structure has become much more developed.

That progression is not exclusive to boutique. Legacy companies and platform brands can create the same kind of attachment, and many do. The reason it belongs in this paper is that the path from recognition to participation has often been more important to boutique and emerging brands because they begin without inherited shelf position, broad advertising reach, or automatic consumer familiarity. For them, participation is not merely something that happens after recognition. It is often one of the ways recognition is built, and sometimes where the relationship begins to change.

CHAPTER 12
THE CUSTOMER ATTACHMENT AND ROLE-CONVERSION PATHWAY

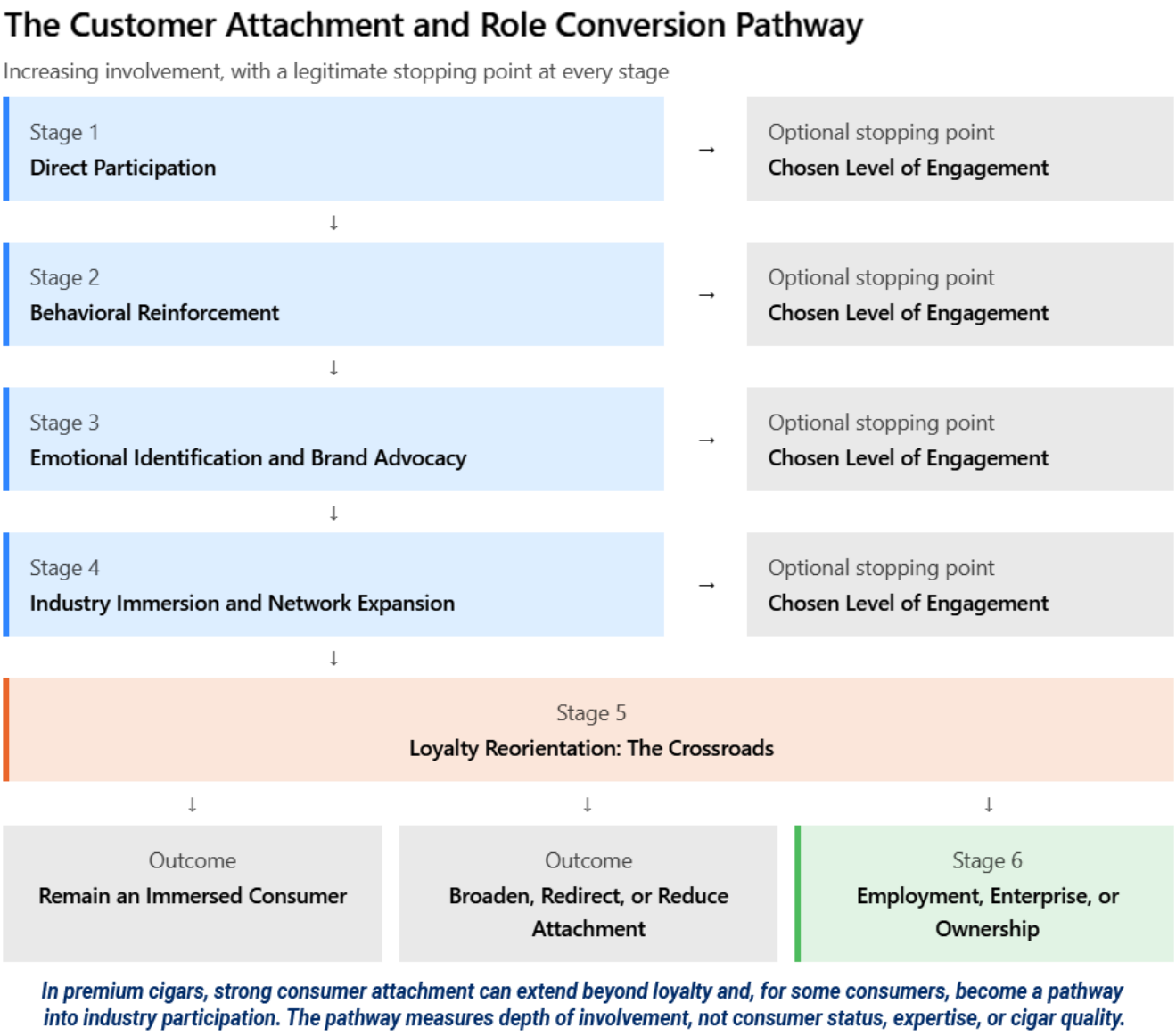
One recurring pattern among companies identified as boutique is the strength of the attachment they can develop among consumers and, somewhat more cautiously, retailers. It seems especially pronounced when a smaller or emerging company is competing against brands that already possess history, distribution, shelf space, and broad recognition. Established and legacy brands unquestionably have loyal supporters, stalwarts, and even fanatics. I would argue, however, that supporters of smaller brands are often more vocal and resolute because their loyalty includes a connection through discovery. They did not simply select an established cigar already familiar to the market. They found something, watched it develop, introduced it to other smokers, and sometimes recommended it to retailers that did not yet carry it. They engage in full-throated defenses of the brand, its principles, its people, and its products. Put more plainly, they do not play any shit when it comes to something they believe they helped discover.

Retailers can develop a similar attachment, although they generally have to express it with greater diplomacy. A retailer may care deeply about a particular company while dealing with dozens of other brands competing for shelf space, purchasing dollars, event dates, and attention. Personal enthusiasm has to coexist with the practical obligations of operating a humidor and maintaining many industry relationships. The retail environment can also become part of the consumer's attachment. A trusted clerk may be the person who first puts an unfamiliar cigar in a customer's hand, while many lounges develop one or more experienced regulars whose opinions carry unusual weight in the room. I think of them as alpha smokers. They hold no title and have no formal authority, but other smokers listen to them because their judgment has earned credibility over time. A customer may initially trust the cigar because he trusts the person recommending it.

The connection created through discovery is not usually available in the same form with an older, established brand. It can remain ordinary loyalty, but it can also grow into participation, advocacy, industry immersion, and eventually a different role within the trade. One of the more unusual characteristics of the premium cigar business is the degree of access consumers have to the people behind the product. In many industries, the relationship between customer and manufacturer is filtered through retail systems, customer-service departments, advertising, and several layers of corporate separation. Premium cigar consumers routinely interact with founders, owners, blenders, sales representatives, retailers, media personalities, and other

company principals through events, lounges, podcasts, livestreams, factory visits, social media, private groups, and continuing community participation.

Owners and company principals can become part of those relationships themselves. Some communicate directly with consumers or participate in the same groups, and the interaction can become personal, social, professional, or occasionally business-related. They learn who people are, what they do, who their friends are, where they travel, what else they enjoy, and sometimes what is happening in their lives outside cigars. That familiarity adds another layer of connective tissue between the consumer, the company, and the community around it. The relationship is still built around a commercial product, but it no longer behaves like an anonymous commercial relationship.



In premium cigars, strong consumer attachment can extend beyond loyalty and, for some consumers, become a pathway into industry participation. The pathway measures depth of involvement, not consumer status, expertise, or cigar quality.

Consumers are therefore not merely purchasing cigars. They are participating in communities built around familiarity, ritual, recognition, conversation, and repeated interaction. In some cases, that participation eventually changes the consumer's relationship not only with the original company but with the entire premium cigar industry. The pathway that follows is not a mandatory sequence or a ranking of better consumers. A person may remain at any stage indefinitely and be perfectly content there. Others may move forward, move backward, skip certain activities, or leave the pathway entirely. Remaining at a stage is not a failure to progress. A consumer who enjoys the cigars, attends events, spends time with friends, and wants

nothing more from the relationship has reached exactly the place he wants to be. The pathway measures depth and direction of involvement, not product quality, expertise, consumer status, personal worth, or loyalty points.

STAGE ONE: DIRECT PARTICIPATION

The first stage represents direct participation: buying and smoking the cigars, attending events, spending time in lounges, interacting through social media, communicating with company representatives, meeting principals, and becoming a recurring presence within the brand's community. The customer begins recognizing the people behind the cigars, and those people may begin recognizing the customer. The relationship remains centered on the product, but it is no longer entirely anonymous. Many consumers remain happily at this stage. For others, repeated participation begins affecting purchasing habits, travel, friendships, and personal routines.

STAGE TWO: BEHAVIORAL REINFORCEMENT

Behavioral reinforcement begins when the consumer follows release schedules, seeks particular allocations, travels to events, buys merchandise, joins groups, and organizes portions of his cigar purchasing around the company and its community rather than around isolated products. The cigar still has to perform. Familiarity, trust, anticipation, and participation have simply become part of the purchasing decision. Consumers at this stage begin learning the company's history, its portfolio, its principals, and the stories behind individual releases. They listen when company representatives appear on podcasts and cigar shows, follow interviews and livestreams, join official and unofficial groups, and share information about where particular cigars can be found. They are no longer familiar only with the cigars they smoke. They understand how those cigars fit within the company and the people responsible for making and selling them.

The groups formed around a company can become remarkably close. Members may spend months communicating through Facebook, Instagram, email, private chats, and Zoom before meeting in person. Eventually, they arrange to meet at cigar events, lounges, factory trips, larger nationally known gatherings such as Big Smoke or the Rocky Mountain Cigar Festival, or gatherings of their own. Some travel together for weekends, visit distilleries, follow whiskey or bourbon trails, and build friendships around interests that eventually have very little to do with the company that originally brought them together. Members also trade cigars and send one another unexpected packages, sometimes containing rare or difficult-to-find releases, a practice commonly called "bombing." The exchange is part generosity, part sport, and part evidence that the relationship has moved beyond people merely buying the same product.

Many of those friendships eventually extend beyond, and sometimes surpass, the original brand connection. The company may have provided the introduction, but the bond belongs to the people. A consumer can remain at this stage for years, following the company, buying its releases, participating in the groups, and enjoying the friendships without carrying the brand's identity outward. For others, repeated participation and personal connection develop into something stronger.

STAGE THREE: EMOTIONAL IDENTIFICATION AND BRAND ADVOCACY

At the third stage, the relationship begins functioning less like ordinary product loyalty and more like cultural attachment. Consumers identify with the company, its people, its philosophy, its presentation, or the community formed around it. Supporting the company becomes connected to supporting something they believe reflects their own taste and judgment. Many of these consumers become brand advocates. Brand advocate is not an industry title, a paid position, or a contractual designation. It describes something consumers choose to do on their own. They recommend the cigars to other smokers, introduce them in lounges, discuss new releases, wear the merchandise, and sometimes approach retailers about carrying the brand. Their advocacy can be persuasive because it comes from personal conviction rather than a sales agreement. They are not reading from talking points. They are telling people about something they genuinely enjoy and believe they helped discover.

Brand advocacy often becomes most visible when the company, its founder, one of its employees, or one of its cigars is criticized. A negative review may start it, but so can a comment from a social media page, a cigar group, a podcast, or an individual who says something the community considers out of line. Supporters may descend on the discussion, challenge the critic's knowledge, motives, methods, or credibility, and defend the company and its people with the same intensity they would defend the product. Whether the original criticism was fair can quickly become secondary. The company does not have to ask for help, and the supporters do not wait to be asked. What began as criticism can become a free-for-all because the participants believe they are defending people they know, a community to which they belong, and their own judgment in having supported it. That reaction can be reasonable, excessive, or somewhere in between, but it demonstrates that the relationship is no longer limited to whether one cigar received a favorable review.

Smaller companies generally know who their strongest advocates are because the same faces appear repeatedly at events, in lounges, online, and around new releases. Recognition can develop naturally without converting the consumer into company property or making every expression of enthusiasm part of a calculated transaction. The relationship has value because it is personal and voluntary. Many consumers remain at this stage because they enjoy recommending the cigars, defending the company, attending events, and participating in the community. Others begin creating platforms, organizing activities, or seeking experiences that bring them closer to the broader industry.

STAGE FOUR: INDUSTRY IMMERSION AND NETWORK EXPANSION

Industry immersion begins when the consumer's activity extends beyond advocating for one company. Some start podcasts, review cigars, organize events, build educational platforms, moderate cigar communities, or develop audiences of their own. Others learn to roll cigars, study tobacco, travel to cigar-producing countries, or arrange informal internships in which they volunteer their time to work with and learn from manufacturers. Some assist manufacturers at trade shows or regional events. That experience can involve considerably more than helping at a booth for a few hours. For several days, the consumer may function as part of the team, helping with setup, meeting retailers and guests, participating in dinners, attending informal gatherings, and seeing how the company operates when the public-facing workday is supposedly over.

For that limited period, the person occupies a space somewhere between consumer and industry participant. There may be no employment agreement or permanent position, but the experience is more substantial than ordinary event attendance. The consumer sees the work, personalities, obligations, tensions, and relationships behind the finished cigar. Event planning, cigar rolling, education, travel, media, and volunteer work also expand the consumer's network. A person who once knew the principals of one company begins meeting other manufacturers, retailers, sales representatives, media figures, factory personnel, and consumers from other brand communities.

Other companies may also take notice. A respected advocate, event organizer, reviewer, podcaster, or familiar trade-show presence has credibility within the community, and competing brands may seek a relationship with that person. That does not mean the original attachment was false or that the consumer was waiting for a better offer. The person has simply developed an identity and reputation beyond the original relationship. Some consumers remain in this stage indefinitely, producing content, organizing events, learning, traveling, volunteering, and participating around the industry without seeking employment or ownership. They remain consumers, but their involvement is no longer limited to consumption. For others, wider exposure produces the proximity paradox.

THE PROXIMITY PARADOX

The same access that deepened the consumer's attachment to one company eventually introduces him to many companies. A person who started a podcast because of enthusiasm for Company A now needs guests from Companies B, C, and D. Someone who volunteered at one manufacturer's event meets representatives from other brands. The reviewer must smoke broadly, and the event planner cannot build an event around only

one set of relationships. The consumer may become more committed to premium cigars while becoming less exclusively committed to the company that first brought him closer. Other brands may court his attention, particularly after he has developed credibility, relationships, or an audience. Companies naturally form relationships with people who are active, informed, visible, and respected, while consumers remain free to decide which of those relationships mean something to them.

Successful engagement can therefore produce a consumer whose knowledge, friendships, and interests extend beyond the borders of the original company. He may remain loyal, but the loyalty now has competition.

LOYALTY REORIENTATION: THE CROSSROADS

Loyalty reorientation is not another promotion up a ladder. It is the point at which the relationship can continue in several directions. Greater knowledge and broader contact do not automatically weaken the original attachment, but they make exclusivity less certain. Loyalty may also follow people across company lines. A consumer may become attached to Company A partly because of its blender, founder, sales representative, or another visible personality. If that person leaves after ten years and joins Company B, the consumer does not necessarily turn against Company A or stop buying its cigars. A portion of his attention follows the person. He tries the new cigars, watches the new appearances, and begins participating in another community while retaining some attachment to the first.

That is usually an expansion of loyalty rather than a complete transfer. The consumer's original connection included a relationship with a person, not merely allegiance to a logo. When that person moves, some consumers move part of their attention with him. Broader industry contact is not the only cause of reorientation. Some consumers are attached to their place in a company's history. They remember when its cigars were difficult to find, when the founder answered messages personally, when the events were smaller, and when the community felt more like a secret society than a customer base. They did not merely purchase the product early. Being there early became part of their identity.

Success can disturb that relationship. Once the company becomes broadly distributed, widely discussed, and familiar to consumers who did not have to discover it, some early supporters experience a loss of exclusivity. The cigar may be unchanged, but their position around it is not. What once felt like ground-floor membership in something unusual can begin to feel like ordinary participation in something mainstream. Early-supporter alienation does not always come from jealousy or resentment. The original attachment may have depended partly on access, recognition, scarcity, community size, or the belief that the consumer had found something before the rest of the market. Commercial expansion alters those conditions. A company can become more successful while becoming less personally meaningful to some of the people who supported it during its earliest development.

Attachment can also weaken because of a bad experience, product inconsistency, unavailable cigars, rising prices, perceived favoritism, commercial overreach, or broken trust. The same proximity that makes the relationship personal can make disappointment personal. A consumer who feels closely connected to a company may react more strongly than someone who regarded the cigar as nothing more than another purchase.

THE POSSIBLE OUTCOMES

One possible outcome is continued brand advocacy. The consumer acquires broader knowledge, new relationships, and greater industry access while remaining closely attached to the original company. Exposure to other brands does not erase an existing relationship, and some consumers continue advocating for the company that first earned their loyalty even after becoming knowledgeable about the rest of the market. Another outcome is broader industry loyalty. The consumer continues supporting the original company while becoming attached to several others. Brand loyalty gradually becomes category loyalty, and the person's identity becomes connected to premium cigars as a whole rather than to a single manufacturer. This overlap

is common, particularly when companies and their principals share friendships, factories, events, retailers, or similar philosophies. Cigar communities do not respect the clean borders marketing departments might prefer.

A third outcome is reduced or lost attachment. The consumer may move away from the original company because of changing tastes, broader exposure, disappointment, commercial expansion, or the disappearance of the intimacy that originally made the relationship meaningful. That departure is not necessarily betrayal. Consumers are entitled to change their preferences and decide where their attention belongs. Personal circumstances can produce the same outward result for completely different reasons. A consumer facing financial pressure, family obligations, health concerns, a demanding job, relocation, or other changes in his life may disappear from events, groups, purchases, and regular participation without having changed his opinion of the company at all. Manufacturers do not always know which kind of separation they are seeing.

The final outcome is employment, enterprise, or ownership within the industry. Interest becomes a formal role, an investment, an operating responsibility, or a livelihood. The consumer may go to work in retail, become a sales representative, join a manufacturer or distributor, plan events professionally, become a cigar roller, manage or purchase a lounge, invest in a company, open a shop, or launch a brand. This is genuine role conversion. The person is no longer assisting temporarily or participating around the edges. He has accepted financial, professional, operational, or reputational risk inside the trade. Decisions that once involved taste, friendship, identity, and enthusiasm must now coexist with inventory, margins, payroll, distribution, schedules, professional obligations, and commercial survival. Cigars may remain personal, but they are no longer only personal.

Entering the industry rarely ends the pathway. The premium cigar business has a peculiar way of recycling its personnel. People resign, separate from companies, disappear briefly, and then appear somewhere else, while remarkably few leave the trade altogether. The industry is full of left-handed relief pitchers: as long as they can still throw strikes, somebody will find room for them. A sales representative may resurface with another manufacturer. A retailer may join a distributor. A media personality may move into sales, events, or brand development. Someone who began as a consumer, volunteered at events, and later accepted an industry position may eventually work for several companies without leaving the same professional and social circle.

At times, a company principal who moves to another organization or launches a new venture brings former colleagues with him. Consumers who were particularly attached to that principal may also begin following his new work. An employee may move for professional, financial, logistical, family, or personal reasons. The consumer who follows him is making a different decision because part of the original attachment belonged to the person rather than solely to the company. The movements may happen at the same time, but they are not the same movement. Employment can accelerate loyalty reorientation because a new position may require someone to represent another company, manage competing inventory, discuss numerous manufacturers publicly, or place professional obligations ahead of an earlier attachment. The company that first encouraged the person's involvement may have helped create an industry participant whose responsibilities now extend well beyond it.

None of these outcomes erases the original relationship. A consumer can remain at any stage, continue as an advocate, become loyal to the broader category, move away from the company, or build a career from the interest it helped inspire. The mistake would be treating the pathway as an escalator on which everyone is expected to reach the top. Most people will not, and most never wanted to. Product quality, construction, consistency, and performance remain beneath the entire pathway. Community cannot indefinitely protect a cigar that fails to deliver, although it may buy the company more patience than an unfamiliar brand would receive. What begins with the cigar can grow into familiarity, friendship, advocacy, opportunity, and livelihood. It can also produce a cultural identity that survives changes in the company itself, which creates a different problem for the meaning of boutique.

CHAPTER 13
WHEN IDENTITY OUTLASTS STRUCTURE

One of the clearest patterns in the record is that identity often survives longer than the business conditions that created it. Companies once associated with narrow distribution, outsider status, limited infrastructure, or unusually close founder proximity can grow well beyond those conditions while retaining the same cultural identity in the minds of consumers.

That is not necessarily deception. Identity has memory. Consumers remember the founder, the early releases, the events, the story, the people they met, and the sense of discovery attached to the company. Those experiences do not disappear simply because production increases or distribution becomes broader.

Operational distance and emotional distance are not the same thing. A company can become structurally mature while remaining culturally intimate. Another can remain genuinely small without generating much emotional attachment at all. Boutique becomes unstable when those two kinds of distance are treated as though they were interchangeable.

The same problem can appear without growth, acquisition, or any formal change in ownership. A founder can retire, die, become less active, or transfer daily authority to the next generation while the company remains privately and even family owned. The name on the box may remain unchanged while the person whose judgment created the identity is no longer making the consequential decisions.

Succession therefore tests more than continuity of ownership. The question is whether authorship, operating discretion, production authority, and accountability were transferred with the title. A company can preserve a founder's values through capable stewardship, but family ownership alone cannot guarantee that result. Identity may survive the founder. Boutique conditions still have to survive the handoff.

CHAPTER 14
THE WORD STARTS TO STRETCH

By this stage, boutique had begun losing force as a stable category while gaining force as market language. The word did not collapse because people stopped understanding it. It stretched because different parts of the market were using it to signal different things: small production, founder presence, creative independence, limited releases, outsider identity, personal connection, discovery, and distance from institutional brands.

A category has to separate things through some reasonably consistent condition. A signal has a different job. It only needs enough shared recognition to create an expectation. Boutique increasingly behaved like the second. It could still tell a consumer that a cigar might feel personal, unusual, scarce, founder-driven, or worth discovering without reliably explaining how the company behind it actually operated.

Market behavior could show that the old boundaries were under pressure. It could not tell me which boundary the industry actually believed in. For that, I had to ask the people using the word.

PART III
WIDENING THE FIELD

CHAPTER 15
THESE WERE MY TWELVE

They were the people closest to me professionally, the people I already knew, or people and companies with whom I felt some connection. Some I had known for years. Others I knew mostly through their cigars, their companies, or their place in the industry. What they shared was that, when I began asking questions about boutique, these were the people I instinctively went to first.

I do not want their position at the beginning of this study to suggest that their opinions carried more weight than the dozens of people who came later. They did not. They were simply the starting point.

The first twelve were:

James Brown, Founder, Black Label Trading Company / Black Works Studio
Matt Booth, Founder, Room101 Cigars
Jonathan Drew, Founder, Drew Estate and J.SANN & SON
Erik Espinosa, President, Espinosa Premium Cigars
Andre Farkas, Founder, Viaje Cigars
Dion Giolito, Founder, Illusione Cigars
Jon Huber, Co-Founder, Crowned Heads Cigars
Pete Johnson, Founder, Tatuaje Cigars
Skip Martin, Co-Founder, RoMa Craft Tobac
Nicholas Melillo, Founder, Foundation Cigar Company
Ernesto Pérez-Carrillo, Founder, Casa Carrillo
Steve Saka, Founder, Dunbarton Tobacco & Trust

A brief disclosure regarding Erik Espinosa is necessary here. Including him in the initial group was inevitable, given that I have worked with him for roughly fifteen years. But his importance to this project is structural rather than editorial.

My time at Espinosa Cigars greased the skids in a very practical sense. It gave me the relationships, credibility, and standing in the industry that meant when I called, people were generally willing to take the call. That access made this project possible.

I did not know what these first twelve would ultimately become when I contacted them. At the beginning, they were simply the people I asked first.

Once their answers came back, however, they became something more useful. They became the baseline group. Not because they agreed. They certainly did not. This was not a scientific control. It was a working reference set whose answers established the first range of responses against which everything that followed could be compared. Their disagreements exposed the initial fault lines: size, identity, production, control, tobacco, independence, growth, authorship, philosophy, and whether boutique remained a useful term at all.

From that point forward, every new manufacturer, retailer, distributor, media voice, and industry participant widened the field and tested what those first twelve had exposed.

The first twelve did not write the test. They simply proved that we needed one.

Only when the field widened by more than thirty additional voices, representing very different companies, scales, philosophies, production arrangements, and market realities, did the original boundaries of the project

begin to fracture. The twenty questions that became the core of this paper were not dictated by the people I happened to know first. They emerged from the contradictions, qualifications, disagreements, and pushback that accumulated as the field expanded and the broader market entered the conversation.

CHAPTER 16
FOUR SECTORS EMERGE

The first surprise was not disagreement. Disagreement was expected. The surprise was what they disagreed about.

I had approached boutique as though it were a disputed category. I expected arguments over boundaries: how small a company had to be, how much it could produce, how far it could distribute, and how much infrastructure it could build before the word stopped fitting. That was not what happened.

The first twelve were not merely drawing the line in different places. Several were drawing entirely different lines.

Four broad response sectors emerged from the initial answers. They were never intended as ideological camps or permanent classifications. They identified the dominant direction of each person's first reaction. Several of these men would later agree with people outside their sector and disagree with people standing beside them inside it.

Matt Booth, Jonathan Drew, and Jon Huber initially clustered around human ethos and identity. Booth reduced boutique almost to instinct, describing a brand that feels human, tangible, and possessed of a soul. Huber emphasized ethos and recognizable human presence over production totals or annual revenue. Drew treated identity as one of the forces that could persist even as production and distribution changed. He described production volume, distribution breadth, and brand identity as components whose relative importance could shift during the life of a company.

These were not conventional operating definitions. They were descriptions of recognizable authorship. The consumer rarely meets a corporate organizational chart. The consumer meets a cigar, an event, a package, a story, an attitude, and often a recognizable person.

James Brown, Erik Espinosa, and Andre Farkas moved toward craft, control, and operating philosophy. Brown understood atmosphere and identity but refused to allow either to replace serious treatment of the raw materials. Espinosa questioned how anybody could measure boutique through sales or size, then described his own understanding through hands-on authority and freedom from corporate approval channels. Farkas tied production to what the tobacco itself could support rather than what a commercial forecast might demand.

Their shared ground was not simply craftsmanship. It was authority over the cigar and the willingness to use that authority.

Dion Giolito, Skip Martin, and Steve Saka formed the most skeptical sector: instability, dilution, and rejection. Giolito described the word as diluted after companies of radically different sizes and structures learned to adapt it to whatever narrative suited them. Martin said he honestly did not know what boutique meant in cigars because different people meant different things when they used it. Saka went farther, calling the term nebulous and ultimately a bullshit marketing moniker. His alternative was not another definition. It was exceptional cigars, professional account management, and superior customer service.

They reached similar territory through different routes. Giolito diagnosed dilution. Martin diagnosed subjectivity. Saka questioned whether the category deserved the effort being spent trying to save it.

Pete Johnson, Nicholas Melillo, and Ernesto Pérez-Carrillo initially gathered around context, transition, and changing conditions. Johnson said Tatuaje no longer fit boutique at the company level, although individual products could still be small-batch or boutique productions. Melillo challenged the comfortable assumption that smaller automatically means better by emphasizing tobacco access, inventory depth, aging, and the resources required to keep blends consistent. Pérez-Carrillo widened the lens from company lifecycle to industry history, contrasting an earlier environment dominated by word of mouth with a modern market shaped by immediate communication, social media, events, media, clubs, and factory visits.

At first glance the sectors looked reasonably orderly: identity, operating philosophy, skepticism, and transition. They did not stay orderly for very long.

CHAPTER 17
WHEN THE SECTORS BREAK APART

The four sectors lasted approximately as long as it took to read the answers a second time. That was useful.

Had the first twelve remained neatly divided into four groups, the exercise might have produced a tidy taxonomy and missed the most interesting evidence. Instead, the alliances changed when the questions changed.

Steve Saka and Jon Huber appeared almost opposite at first. Huber preserved boutique through ethos and recognizable human authorship. Saka wanted little to do with the term. Yet once the discussion moved away from the word and toward how a serious cigar company should behave, the distance between them narrowed.

Saka's objection was not to craftsmanship, intention, or professional standards. His objection was to using boutique as though the label itself proved any of them. A man could reject the category while defending many of the behaviors its strongest supporters believed the category was supposed to represent.

James Brown produced another crossover. Brown clearly understood the power of branding and authored identity. Black Label Trading Company and Black Works Studio were never intended to feel anonymous. He spoke openly about creating something larger than the cigar itself, a recognizable feeling and environment consumers could understand. Placed beside Booth and Huber, Brown sounded perfectly comfortable in the identity sector.

Then he drew a harder line. If a company white-labeled a small batch from an ordinary mass-production environment, used ordinary production tobacco, and surrounded it with attractive branding, Brown did not consider the result boutique merely because it was scarce and looked interesting. His position was not contradictory. It was layered. Identity could be real. Identity could matter. Identity could be powerful. Brown simply refused to accept identity as sufficient evidence of what happened to the cigar.

Pete Johnson introduced a different fracture by separating the company from the product. If boutique was a company classification, Tatuaje had moved beyond it in his view. If boutique could describe an individual small-batch production, the answer changed.

That exposed a problem hidden inside ordinary cigar language. The industry routinely moves between “boutique company” and “boutique cigar” as though the phrases describe the same unit. Pete's answer suggested that they may not.

Nicholas Melillo complicated another comfortable assumption. Limited resources are often treated as virtues in boutique storytelling. Smaller becomes closer. Smaller becomes more careful. Smaller becomes more authentic. Sometimes.

Smaller can also mean less purchasing power, less inventory depth, less ability to hold enough of a specific tobacco, and greater vulnerability when a crop changes or a particular tobacco becomes unavailable. Melillo

was not praising corporate scale. He was refusing to pretend that resource limitations disappear because a company has a compelling story.

Andre Farkas produced another crossover. His operating style clearly resulted in limited production, but his explanation did not end with smallness. Production followed the tobacco. If the tobacco could not support a project, the project waited or disappeared.

Under that logic, smallness was often the result of the philosophy rather than the philosophy itself. A company can be small because it cannot make more cigars. A company can also remain limited because it refuses to make more cigars under conditions it considers unacceptable. Those are different things.

Erik Espinosa shifted the argument toward authority. His first reaction questioned whether anybody could actually measure boutique through sales or size. When he eventually described why he still considered his own company boutique in one sense, he did not answer with a production figure. He answered through behavior: hands-on involvement, direct decisions, freedom from layers of approval, and the ability to act without waiting for a committee.

By the second reading, the original four sectors no longer looked like destinations. They looked like starting points.

The same manufacturer could occupy different sides of different disputes without contradicting himself because the disputes were measuring different things. The first twelve did not form stable camps. They formed temporary coalitions around individual questions.

CHAPTER 18
WHAT THE FIRST TWELVE ESTABLISHED

The first twelve did not establish a definition of boutique. They established why one was becoming so difficult to hold together. Their answers exposed several different ideas being compressed into the same word: size, identity, human authorship, production philosophy, decision authority, tobacco discipline, company maturity, product-level limitation, historical conditions, and consumer perception. The disagreement was not simply over where to draw a line. They were arguing over what kind of line deserved to be drawn in the first place.

If boutique was primarily a size category, Espinosa's question remained unanswered: how small? If it was an identity category, Brown's objection remained: can identity compensate for generic production? Johnson complicated the company-level argument by separating Tatuaje from individual cigars within its portfolio. Drew challenged the assumption that identity necessarily disappears when operating scale changes. Melillo warned against treating limited resources as evidence of superior consistency, while Saka, Martin, and Giolito were already questioning whether the word had become so elastic that it could be stretched around almost any company willing to claim it.

By then, the first twelve had produced something more useful than another definition. They had produced the questions. The remaining issue was whether those questions reflected the premium cigar industry more broadly or simply reflected the particular people I had called first. Before widening the manufacturer field, I wanted to see what happened when the same word left the factory, crossed the counter, and entered the humidor.

CHAPTER 19
THE RETAILERS

RETAIL PARTICIPANT STRUCTURE

I started the retail side of this project in Miami for a less complicated reason than methodology: I live here. These were the humidors and retailers closest to my daily experience, so moving from the manufacturer

record into retail naturally began in South Florida. The choice was geographic and practical before it became analytical, and many of the contributors came through the same proximity-based relationships that shaped the first manufacturer group.

That beginning comes with an obvious limitation. Miami and South Florida do not represent the entire national cigar market, and these findings should not be treated as universal retail behavior. The advantage appeared after the fact. South Florida operates under unusually dense premium-cigar conditions, with tourism, market saturation, constant launches, high consumer familiarity, aggressive brand competition, and rapid product turnover. It became a useful pressure test precisely because boutique cigars are evaluated quickly, commercially, and with little patience for romantic theory once they have to earn space in an actual humidor.

What began in Miami did not remain a South Florida inquiry. Once the initial retail responses exposed the practical issues I wanted to test, I widened the question geographically and brought in retailers from other parts of the country. The purpose was not to create a statistically representative national survey, but to determine whether the same concerns about shelf space, discovery, hand-selling, inventory movement, brand familiarity, and boutique positioning appeared outside the market where I began.

Cultural visibility does not automatically make South Florida friendly to boutique cigars. Most local retailers still operate within a model built around stable, proven sellers such as Fuente, Padrón, Davidoff, Ashton, Drew Estate, Oliva, Rocky Patel, My Father, General, and Altadis. The model is proven and difficult to argue with, especially when humidor space is limited by buildout and always at a premium. Those companies carry recognition, repeat purchase behavior, and built-in consumer confidence. Most retailers cannot spend the entire day explaining every unfamiliar cigar one customer at a time. Products that already sell themselves require less labor, less explanation, and less hesitation at the counter.

Not every retailer wants the same humidor, however, and brand preference is only one part of the difference. Some stores lean heavily toward established national companies, while others deliberately devote more space to independent or boutique brands. Some become known for limited releases or harder-to-find cigars. Others serve customers who prefer larger ring gauges, while another shop may sell considerably more traditional sizes. Price can define the room just as strongly. A value-oriented shop may move bundles, house cigars, Cuban sandwiches, and lower-priced products because that is what its clientele wants, while another store can support a large inventory at significantly higher price points. These are different businesses serving different smokers, even though all of them may appear under the same broad heading of premium-cigar retail. Local discretionary spending can make a fifteen- or twenty-dollar cigar routine in one market and a difficult purchase in another, while a seventy- or eighty-dollar cigar may be commercially unrealistic regardless of how impressive it appears elsewhere.

There are also retailers that simply have little interest in independent or boutique companies. That can be frustrating for a smaller manufacturer, but it is not necessarily irrational. The owner may already have a model that works, the clientele may overwhelmingly prefer recognizable brands, existing vendors may occupy most of the available space, or the store may have little appetite for products that require sustained hand-selling. A sales representative can have a very good cigar at a reasonable price and still be standing in a room that is structurally difficult for his company to enter. Part of selling to retailers is recognizing the difference between a difficult account and an account that was never particularly interested in what you were offering.

The opposite condition exists as well. Some retailers make discovery a central part of their identity and actively seek companies their customers are unlikely to see everywhere else. That can create excitement and give the shop a recognizable point of view, but the search for differentiation can be pushed too far. A humidor can become so committed to unfamiliar products that discovery begins turning into obscurity. Local companies, very small brands, and highly specialized cigars can absolutely deserve shelf space, but obscurity alone is not evidence of merit. **Boutique cannot become a synonym for unknown.** If virtually every box requires a lengthy explanation before the consumer understands why it is there, the retailer may have created an interesting humidor while also creating an enormous hand-selling burden for himself and his staff.

The boutique market itself produced far more ventures than surviving market memory tends to preserve. The companies most visible in the modern conversation are generally the ones that survived the same retail, inventory, distribution, and commercial pressures examined throughout this paper. Being unknown was never enough. Eventually the cigar had to become known to somebody, and then that person had to buy it again.

RETAIL FINDINGS

When I brought these questions to shop owners, their responses repeatedly pushed the boutique discussion away from abstract identity and back toward movement, inventory behavior, customer engagement, and shelf survival. In highly competitive humidors, retailers manage limited space, consumer familiarity, labor demands, inventory risk, and repeat purchasing simultaneously. Many therefore approached boutique less as a stable category than as practical humidor language tied to discovery, differentiation, and customer curiosity. The retail question was rarely just, “What does boutique mean?” It was closer to, “What does this cigar actually do once I give it shelf space?”

Several retailers associated boutique most strongly with differentiation and discovery. **Alan Shuminer, Owner of Caribbean Cigars in Miami**, repeatedly returned to the commercial value of carrying products consumers are unlikely to encounter everywhere else, noting that boutique cigars “allow me to differentiate.” He tied the category directly to active customer curiosity when customers come in asking what is new. In his environment, boutique survives through novelty, separation, retailer participation, and ongoing discovery rather than broad built-in recognition. While large national lines carry immediate consumer familiarity, boutique products rely more heavily on retailer recommendations, customer experimentation, and active engagement to generate attention, functioning less as permanent inventory anchors and more as freshness mechanisms inside mature retail environments.

Other retailers approached boutique through inventory pressure and long-term shelf viability. **Jorge Valdes, Co-Founder of Sabor Havana Cigars in Doral**, described boutique brands as complementary additions rather than foundational inventory. They add variety, curiosity, and excitement beside established staples, but limited space and consumer familiarity naturally restrict how much of that inventory a retailer can support. That arrangement is often the practical condition under which boutique products survive inside a humidor that must also carry the cigars customers already expect to find.

That pressure became even more direct in the responses from **Abe Dababneh, Founder of Smoke Inn Cigars in Boynton Beach**. Operating across multiple retail locations with a significant online presence, Dababneh repeatedly returned to sell-through, inventory turnover, and long-term shelf performance. His answer to what ultimately decides shelf space was simple: what sells. Boutique cigars may create curiosity and short-term excitement, but excitement does not pay rent on a shelf forever. Inventory has to turn, and a category label cannot carry a box that customers are not buying.

Dababneh also tied boutique viability to owner participation, noting that if the owner is unwilling to get behind a brand, the retailer has little reason to expect the product to succeed. At the same time, he pointed out that retailers cannot allow their selections to become stagnant. That tension helps explain why some of the more interesting retail models do more than simply choose between established brands and independents. They create ways for the retailer to participate more directly in what reaches the customer.

Store exclusives are one example. A retailer can work with a manufacturer on a cigar intended specifically for that store or customer base while leaving production, tobacco, blending, and factory execution with the manufacturer. Some of those relationships become continuing series rather than isolated projects. Smoke Inn’s Microblend concept is, to me, a particularly smart version of the idea. The retailer gains something genuinely differentiated and can bring knowledge of its customers into the project, while the manufacturer contributes the production experience and resources needed to make the cigar. The retailer is more involved than an ordinary reseller without pretending to have become a factory.

Retail participation can move farther still. Some shops develop house cigars, proprietary lines, or several brands of their own, creating a spectrum that runs from retailer to curator, exclusive-project partner,

proprietary-brand owner, and eventually something approaching a quasi-manufacturer. Those roles should not be treated as interchangeable. A retailer collaborating with an established manufacturer on an exclusive cigar occupies a different position from one developing and marketing a portfolio under its own control. Both may compete for shelf space beside the national brands the retailer also sells, which makes the modern humidor more complicated than a simple manufacturer-to-retailer-to-consumer chain.

At the retail level, the term does not need to resolve every classification problem to remain useful. It works as recommendation, positioning, and discovery language because consumers broadly recognize the experience it signals, even when it says nothing about production scale, ownership structure, manufacturing environment, or long-term business position. Retail therefore exposes one of the category's clearest contradictions: boutique may weaken as formal business language while remaining highly effective as sales language. Once the term moves beyond the humidor into reviews, rankings, interviews, podcasts, launch coverage, and broader media discussion, it performs a different function. It stops being shorthand between retailer and consumer and becomes part of the language that organizes the industry's public identity.

CHAPTER 20
THE HUMIDOR TEST

RETAIL PLACEMENT, DISCOVERY, AND HUMIDOR POLITICS

Retail placement quietly shapes boutique perception before the cigar is ever smoked. Inside the humidor, boutique cigars compete not only against other cigars, but against familiarity, habit, legacy placement, customer confidence, and visual hierarchy. Established brands often arrive carrying built-in recognition and preferred eye-level positioning, whereas boutique-positioned cigars frequently enter under different conditions, forcing the product to overcome basic visibility before a consumer ever evaluates construction, flavor, or craftsmanship.

Several retailers approached boutique through discovery mechanics and humidor geography, where placement becomes part of the product experience rather than simple merchandising. **Tim Swanson, Owner of Cigars Daily in Phoenix**, pointed toward one of the clearest modern shifts: boutique attention increasingly follows recognizable personalities attached directly to the cigar. Swanson explained that boutique brands set apart usually have a prime influencer in front of their consumer all the time, adding that the effect works best when that person is central to the brand. Consumers may therefore encounter the company through podcasts, social media, events, online communities, and direct interaction long before seeing the physical box.

Once the consumer enters the store, the old rules of geography return. **Tucker Hobbie, Owner of Wendell Cigar Company in Wendell, North Carolina**, noted that legacy brands almost always occupy premier locations at eye level or have their own dedicated sections, while boutique-positioned cigars can end up below eye level, far above it, or tucked into corners. **Jerry Gavito Jr., Owner of Lake Worth Cigars in Lake Worth, Texas**, described the same problem from the other direction. Lesser-known products sometimes require deliberate placement on a center table or beside a strong-selling brand simply to create enough visibility for a customer to ask about them.

Vick Shah, Owner of Norwood Royal Cigars in Chicago, views the humidor as part of the story surrounding the cigar rather than passive storage. That is probably closer to how many customers experience it than they realize. A humidor has geography, hierarchy, neighborhoods, and habits. Some boxes occupy places customers have been walking toward for years. Others are trying to interrupt the route.

Other retailers approached placement less through geography and more through trust. **Stephen Frank, Owner of Boll Weevil Cigars in Enterprise, Alabama**, emphasized that boutique shelf placement depends on retailer confidence in both the cigar and the people behind it. For Frank, personal preference, a strong relationship with the owner or sales representative, construction confidence, and purchasing flexibility all drive stocking decisions. He noted that personal preference and company relationships can drive him to stock boutique blends, while construction is a huge selling point and ordering flexibility allows him to carry key selling blends

without taking on an entire portfolio. Relationship opens the door; construction, movement, and ordering flexibility keep the cigar on the shelf.

I have always wanted to own a cigar shop, although my lack of business acumen should probably have disqualified the idea much earlier than it did. I love cigars, and like anybody who has spent enough time around them, I have my own vision of what a good humidor should contain. Then I spent four days a week sitting in a cigar shop and later began traveling regularly for work. The romance became considerably easier to separate from the responsibility.

My respect for retailers grew from that experience, particularly for owners who take real pride in their establishments. A good cigar shop can look effortless from the chair. It is not. The owner has inventory, payroll, rent, utilities, buildout, vendors, events, employees, regulations, personalities, and a room full of regulars who eventually develop their own ideas about how the place should operate. The owner can establish the rules, but much of the daily peace is maintained informally. Unless something crosses a real line, the inmates have a remarkable ability to run the asylum.

I love it when shops go beyond selling cigars. The best of them educate consumers, build genuine cigar communities, introduce new products, host manufacturers, and create useful content. They understand that a shop can be a classroom, a gathering place, and a point of discovery without pretending that every lesson makes the retailer the grower, blender, or manufacturer.

Some retailers know an extraordinary amount, and manufacturers would be foolish not to listen to them. Others return from factory visits with more confidence than those visits have earned. Access can produce knowledge, but it can also produce the illusion of mastery. Proximity to the work is not the same thing as doing the work.

Expertise also carries an obligation to be accurate. Honest mistakes happen, including in good shops run by conscientious people. The distinction is what happens after the mistake is recognized. A responsible retailer corrects it. The larger problem begins when incomplete or incorrect information is delivered with enough authority that the consumer accepts it as gospel.

That social balance matters because a cigar shop is not shaped exclusively by the person who owns it. The owner begins with a concept, chooses the first inventory, establishes the price range, decides what companies he wants represented, and sets the tone of the room. Then customers begin arriving, and the original plan meets retail.

THE PERFECT HUMIDOR DOES NOT EXIST

If I opened a cigar shop tomorrow, the first twelve manufacturers in this study would tell you a great deal about what my first humidor would probably look like. Those were companies I knew, respected, smoked, or felt some connection to when this project began. They would form much of my starting point.

Then a customer would walk in and tell me he smokes Macanudo Tubos by the box.

Now I carry Macanudo Tubos.

Another regular wants St. Luis Rey. Another wants Baccarat. A younger smoker spends his time across a dozen forums and social groups and walks in asking about whatever small release everybody started discussing three nights earlier. An old-timer wants a good five-dollar cigar and has no interest in listening to anybody explain why the cigar beside it costs eighteen. Another customer wants Cuban sandwiches or an unbanded bundle because that is what he likes and what he wants to spend.

Nothing has gone wrong. The store has started becoming a store.

The owner begins with a vision. The clientele starts editing it almost immediately. That editing happens through brands, but also through price, vitola, format, and habit. Some stores develop strong large-ring

business because their customers smoke large-ring cigars. Other rooms lean toward traditional sizes. One clientele can support expensive limited releases while another makes its money on bundles and value cigars. A retailer can prefer one style personally and still discover that the customers paying the bills have other ideas.

The perfect humidor therefore does not exist because a humidor is not being built for one smoker. A perfect selection for the owner might leave a significant part of the clientele with nothing they want. A perfect humidor for one regular could contain fifty boxes another regular would never touch. Purchasing dollars are finite, physical shelf space is finite, and consumer preferences are not. Every customer who buys consistently makes a small argument for why another box belongs on the wall.

Over time, the shop develops a negotiated identity. The owner still matters enormously, but so do the staff and the customers who return every week. Certain cigars begin moving because a clerk believes in them. Others develop credibility because experienced regulars smoke them repeatedly and recommend them around the room. The influential smoker I described earlier as the alpha smoker can have considerable pull here. He does not place the order and cannot guarantee a reorder, but he can help turn an unfamiliar box into something customers begin asking about.

Manufacturers and sales representatives sometimes underestimate that layer. The relationship with the owner is essential because the owner controls the account, but the clerk is often the person standing in front of the humidor when the customer asks what is new, what is good, or what he should smoke next. The owner decides what can be sold. The staff has tremendous influence over what gets tried. Trusted regulars can add another form of credibility once the cigar enters the room.

The clientele then reinforces or rejects all of it. A recommendation can create the first sale, but repeated purchasing decides whether enthusiasm becomes inventory movement. The humidor gradually becomes a record of compromises among what the owner believes in, what the staff can sell, what regular customers request, what influential smokers champion, and what the numbers allow the retailer to keep.

STAFF TRUST, HAND-SELLING, AND RETAIL LABOR

Boutique discovery rarely happens automatically. In many cases it depends on quiet labor across humidors, counters, lounge conversations, staff recommendations, and repeated customer interactions. Lesser-known cigars require explanation and some degree of trust before consumers move away from familiar products carrying decades of recognition.

Several retailers approached boutique through guided discovery and trust transfer, where successful hand-selling depends on gradually moving consumers toward adjacent experiences that still feel recognizable. **Jeff Martinez, Owner of The Vault in Meridian, Idaho**, described that process as a guided transition, beginning by connecting customers to something familiar before placing them with something close, yet different, in a boutique offering. Martinez emphasized that successful recommendations can create long-term behavioral change beyond a single transaction, noting that a recommendation that hits for the customer is the true beginning of brand loyalty.

Dan Wood, Owner of Wooden Indian Cigars in Havertown, Pennsylvania, approached the same process through staff belief. A recommendation sounds different when the employee actually likes the cigar and understands why he is recommending it. Story, price, packaging, and appearance can help create interest, but belief behind the counter makes the recommendation credible.

That is why winning the clerk can be as important in practice as winning the owner. The owner has to authorize the purchase, but he cannot stand beside every customer all day. Most shops depend on staff, and those employees develop their own relationships with the regulars. Customers learn which clerk has tastes similar to theirs, which one knows a particular category, and which one has never steered them wrong. The manufacturer who earns that person’s confidence gains access to a conversation that may happen dozens of times before the next sales visit.

That tension surfaced repeatedly. Retailers may appreciate smaller brands and founder-driven experimentation while recognizing that boutique cigars require additional labor to support successfully. The retailer is supplying explanation, narrative framing, recommendation confidence, and visibility support simultaneously. That carries real commercial risk: a successful recommendation transfers the retailer's credibility onto the product, building repeat business if the cigar performs, or damaging confidence in the staff member if the recommendation misses. For the consumer, the boutique cigar represents discovery; for the retailer, it often represents labor.

RETAIL RISK, MOVEMENT, AND SHELF SURVIVAL

Retail enthusiasm does not guarantee shelf survival. A cigar may receive initial placement because of story, packaging, curiosity, scarcity, staff enthusiasm, principal visibility, or consumer buzz, but long-term placement depends on reorder velocity. Shelf space is finite, and while companies expect sales to grow year after year, the physical footprint of the humidor generally does not grow with them. Every new company, line extension, and limited release is asking for space already occupied by something else. Appreciation alone cannot keep a cigar on the shelf. The humidor is inventory, and inventory eventually answers to movement.

Charles Oxendine, Owner of Anstead's Tobacco Company in Fayetteville, North Carolina, addressed that operational reality directly, arguing that boutique no longer carries the same historic weight at retail and that the market often operates on the simpler distinction between small brands and big brands. He reduced long-term shelf survival to its least romantic form: what sells. Wood brought price into the same discussion because routine smoking habits eventually encounter routine budgets, while Frank returned to construction and movement after relationships and owner access had opened the account. Different retailers arrived at the same basic problem from different directions. The cigar has to earn another order.

Eric Drazen, Owner of Oak Glen Tobacconist in Raleigh, North Carolina, highlighted regional familiarity and direct manufacturer access, noting that tobacco and cigars are widely accepted in North Carolina and tying boutique perception to human accessibility. In his experience, consumers enjoy a direct line of contact with many boutique companies rather than just a corporate email address. That proximity gives the retailer another tool because the cigar can arrive with a recognizable person and relationship attached to it, although access still cannot substitute indefinitely for performance on the shelf.

The pressure on that shelf is no longer coming only from the shop across town. Brick-and-mortar retailers compete with large online sellers, subscription programs, cigar-of-the-month clubs, aggressive promotions, and inventories that no neighborhood humidor could reasonably duplicate. A customer can sit in a lounge, pull out his phone, compare prices, find a cigar the store does not carry, and order it before the cigar already in his hand is finished. The physical retailer still has rent, payroll, utilities, buildout, inventory carrying costs, employees, events, and all the other expenses involved in maintaining an actual place where people can gather.

Online retail should not be treated only as the enemy of the brick-and-mortar store. In much of the country, it is a necessary part of cigar access. The United States is vast and made up of far more than large metropolitan areas with several premium tobacconists nearby. Plenty of smokers live in small towns, rural areas, or places separated by substantial distances from a well-stocked cigar shop. State and local governments can widen that distance through restrictions on tobacco sales, flavored products, indoor smoking, and where a cigar can be consumed. Some jurisdictions have reached the peculiar point where a retailer can legally sell the cigar while being prevented from allowing the customer to enjoy it on the premises. Whatever argument produced the law, it does little to make the physical retailer's job easier.

For me, none of that replaces the cigar shop. Nothing beats sitting in a brick-and-mortar store and having a cigar with people I know. I already spend enough time alone, and I prefer to smoke with my cigar community and people whose company I enjoy. Some days the room is packed. Other days it is light and only a handful of familiar people are there. Either way, a good shop becomes a home away from home. The cigar may have been the original reason you walked through the door, but eventually the people become part of the reason

you return. You know the employees, the regulars, the personalities, the arguments, the chairs people favor, and the rhythm of the room.

That is the advantage a shipping box cannot reproduce. Online retail solves access; the brick-and-mortar shop provides place. One serves a smoker who may have no reasonable shop nearby and gives everyone access to a national marketplace. The other can provide service, recommendation, immediacy, relationships, fellowship, and a physical community. They occupy the same cigar market without providing the same thing, and the retailer sitting between those two realities has to find enough reasons for customers to keep walking through his door.

In the cigar world, a story has always been able to sell a cigar, at least the first time. After that, it is all on the cigar itself. Relationship, visibility, narrative, recommendation, identity, and community can create the first trial, but repeat purchasing determines whether the box survives.

Read the humidor but also read the room. Eventually, every cigar inside it faces the same operational question: **Does it move?**

CHAPTER 21
MEDIA, COMMUNITY, AND THE MEANING OF DISCOVERY

MEDIA VOICES

Media contributors approached the boutique question from a different position than manufacturers or retailers. They were less focused on production mechanics or humidor movement and more focused on language, visibility, identity, reputation, audience perception, and how the category is presented publicly.

As part of this paper, several members of the cigar media were asked how they personally interpret the term "boutique." Out of professional respect, their responses are kept unattributed. The purpose was not to spotlight personalities or manufacture consensus, but to examine how media contributors interpret, repeat, challenge, defend, and preserve boutique language. The responses identify recurring patterns rather than individual authority, and they are not a substitute for attributed evidence or observable market behavior; their value comes from repetition across media-facing perspectives, not from any single participant. Because of my role at Espinosa Premium Cigars, I interact regularly with cigar media across print, digital, podcast, livestream, retailer commentary, marketing, and event coverage. Over time, those relationships moved beyond interviews and product reviews into broader conversations about consumer behavior, branding, launches, positioning, and market reaction.

The clearest theme throughout the media responses was that contributors often recognized boutique instinctively while struggling to define it operationally. One summarized the problem almost immediately: "But what's 'small'?" That question surfaced repeatedly. Contributors could usually identify boutique emotionally or culturally, but the moment the discussion shifted toward measurable thresholds, the category dissolved back into interpretation. The instability was not simply about production numbers. Contributors disagreed on whether boutique should describe size, process involvement, ownership structure, accessibility, philosophy, identity, scarcity, operating behavior, founder proximity, or audience perception. Eventually, one reduced the issue almost accidentally: "Maybe it's all, some, or even none of those things?" The category stayed recognizable even as its boundaries refused to hold.

Several contributors moved away from size entirely and framed boutique through closeness to the cigar and closeness to the people responsible for it: cigar-first decision-making, visible principal involvement, accessibility, responsiveness, and resistance to decisions driven by inventory optimization, marketing systems, or operational efficiency. One described boutique as "making product decisions to improve the cigar without cutting corners or sacrificing quality."

Another framed it more directly as "approaching cigar creation from a cigar-first perspective, not a marketing perspective." That separation surfaced repeatedly. "If you have a marketing plan before the cigar is blended or rolled, it's not boutique," one argued, while another pushed it deeper into operational behavior: "If you're optimizing tobacco inventory or building around spare inventory, you're not boutique." The same instinct appeared in comments about restraint, "The moment you make a decision based on bottom-line price instead of making the best cigar, you are no longer boutique" and about founder proximity, where one described boutique companies as "independent, privately held" operations whose "principals know every facet of their operation from seed to store." Another reduced the distinction almost entirely to accessibility: "If you can reach out to the principal and get a response, you are boutique." At its bluntest, the category became openly anti-corporate: "If you have an HR department, you are not." The instinct underneath was consistent. Boutique was no longer defined through production numbers but through visible proximity between the cigar, the company, the decision-makers, and the consumer.

The most analytically important media pattern was the repeated recognition that boutique functions as positioning language, whether the industry admits it or not. One contributor explained that boutique "never had an agreed-upon formal quantification, nor would it truly matter if it did." Another reduced it more bluntly, calling it "a marketing term to designate us against them." The second formulation shifts boutique away from classification and toward presentation: not how a company operates internally, but how it should be

understood publicly by consumers, retailers, media, and competitors. The term creates that contrast by suggesting intimacy rather than institution, authorship rather than anonymity, founder accessibility rather than corporate distance, creative individuality rather than standardized behavior, and perceived independence rather than market sameness. The category stayed commercially and culturally useful even as it became analytically unstable because it gave the market a recognizable way to separate "us" from "them" without requiring consensus on where that separation begins or ends. "You aren't dealing with a rep of a faceless brand," one contributor explained. "You are here with me, the owner." The term created a feeling of directness even when the underlying business structures varied substantially. And media did not simply repeat that language; it organized the narrative around it. Reviews, interviews, podcasts, rankings, launch coverage, and trade commentary reinforce the idea that certain companies feel more personal, authored, limited, independent, or culturally distinct, even when the structure beneath them does not support the distinction.

That positioning logic extended into how media contributors observed retailer behavior. Retailers described boutique from inside the humidor, where the concerns were movement, shelf space, hand-selling, and repeat purchase; media contributors described the same pattern from outside the transaction. Smaller brands, limited releases, and harder-to-find cigars gave retailers a way to separate themselves from competitors carrying largely similar core inventory. “It also lets retailers differentiate themselves from others,” one noted. Another explained that broader boutique selection lets retailers market themselves as carrying the “best” or widest assortment, logic that extended into pursuit itself: “It also lets them try to steal consumers from others by having a product others don’t.” The media contributors were tracking how that behavior circulated through reviews, podcasts, rankings, retailer identity, and consumer pursuit until it became culturally reinforced. In that environment, boutique functioned less as production terminology than as discovery language, organizing how consumers searched for difference inside a crowded premium cigar landscape.

By the later responses, several contributors stopped pretending the category remained stable at all. "I think it's a BS term," one stated directly. Another argued that boutique "doesn't fit well within the cigar industry," noting that production levels considered boutique in cigars would not remotely qualify as boutique anywhere else: "You can make a million cigars a year and still be called boutique here." Even the skeptics acknowledged that the market kept using it, because consumers, retailers, media, and manufacturers still recognized it emotionally long after the operational boundaries gave way. Boutique no longer behaved like a clean category. It carried identity, process, scarcity, authorship, positioning, atmosphere, familiarity, participation, and market mythology at once, all under a single term the industry continued using despite struggling to define it.

WHEN THE RETAILER ALSO BECOMES THE MEDIA

Retailers increasingly operate in more than one part of the industry. A shop may have a studio, produce a podcast, publish editorials, create best-of lists, host manufacturers, and sell cigars carrying its own name. None of those activities is automatically objectionable. Retailers often create excellent educational material, strengthen the community around their stores, and give smaller manufacturers exposure they would struggle to obtain elsewhere.

The overlap does create an obligation to identify which role is speaking. A retailer reviewing products occupies a different position when one of the products belongs to the retailer. A shop publishing a best-of list that includes its own proprietary cigar has not necessarily invalidated the list, but the commercial interest should not be hidden behind the appearance of detached authority. The microphone does not remove the cash register.

The problem is not that a retailer has entered media, education, or product development. The problem begins when credibility earned in one role is used to support information that is incomplete, misleading, or simply wrong in another. Consumers may repeat what they hear from a trusted shop as fact. That creates an obligation not to misinform them, even when the misinformation was not deliberate.

Did they cross a line? They should look behind them.

CIGAR COMMUNITY, CULTURE, AND LIFESTYLE SIGNALS

Consumers were often responding not only to cigars themselves, but to identity, discovery, participation, familiarity, and perceived proximity to the people behind the product. Within community and lifestyle discussions, boutique repeatedly moved away from measurable production language and toward cultural recognition. Conversations that began around smaller production, unusual tobacco, or limited distribution frequently expanded into authenticity, underdog attachment, visibility, exclusivity, trust, and emotional connection. In many cases, boutique no longer behaved like a production classification at all. It behaved like social signaling.

Part of that shift comes from how premium cigars function culturally. Smokers may describe themselves as open to trying anything, but most gradually develop recognizable preference ecosystems over time. Wrapper gravitation, strength preference, nicotine tolerance, price comfort, lounge environment, brand familiarity, and social identity all begin shaping behavior before the cigar itself is selected. The community responses repeatedly returned to discovery. Smaller brands often carried the feeling of finding something overlooked, less commercial, more personal, or more closely connected to identifiable people behind the cigar. Consumers attach differently to products that feel reachable through visible founders, active social engagement, recognizable philosophy, or direct interaction within the community itself.

A community-facing digital contributor with retail experience observed that many consumers do not automatically recognize small-batch or boutique conditions once cigars enter the retail humidor. "To the common knowledge of the average consumer they often don't even notice how small batch these companies are in a regular humidor because once a box is displayed on the shelf it's almost an even playing field. It's more up to me to point that out and explain." Boutique characteristics are not always self-evident at the point of sale. Once cigars enter the humidor ecosystem, recognition increasingly depends on explanation, storytelling, retailer framing, digital visibility, and community reinforcement rather than immediately visible production differences.

Participation can then become identity. Limited releases, regional exclusives, event cigars, unusual tobacco usage, and hard-to-find products create environments where acquisition itself becomes part of the experience. Possession sometimes functions less as ownership than as proof of participation within the community surrounding the cigar. Several contributors noted that social media visibility, celebrity association, influencer culture, and fear-of-missing-out behavior increasingly amplified how boutique identity circulated through modern cigar culture.

That emotional dimension helps explain why boutique survived even while its structural precision weakened. The category still signaled difference, discovery, selectivity, authorship, and perceived closeness to something more personal than the larger systems surrounding it. Those perceptions do not always align neatly with operational reality. A company may appear intimate while operating with significant infrastructure. Another may remain genuinely close to production while lacking the visibility systems consumers associate with boutique culturally. That split between structure and perception surfaced repeatedly throughout the comparison group.

The community and lifestyle responses also carried visible skepticism toward boutique as marketing language. Scarcity cues, secrecy, vague small-batch claims, and manufactured exclusivity were treated cautiously unless accompanied by transparency, consistency, education, and long-term credibility. One contributor summarized the fatigue bluntly, observing that "a knowledgeable cigar smoker… can easily smell the marketing bullshit by now from the next tobacco field over." One contributor may have summarized the situation more accurately than anyone else in the paper: "Probably not the right word to use. But it is what it is."

ACCUMULATED RECOGNITION AND MARKET GRAVITY

One of the clearest reinforcement systems identified throughout the paper involved rankings, review consensus, repeated visibility, and accumulated market recognition. While contributors often disagreed about

the structural meaning of boutique, rankings and repeated recognition still influenced how consumers, retailers, traditional media, podcast contributors, digital cigar personalities, and the broader market interpreted legitimacy, quality, and importance.

That influence matters because rankings do more than reward cigars. They reinforce market gravity. Repeated placement inside major lists, consistent review visibility, strong rating performance, recurring discussion across platforms, and ongoing consumer recognition all contribute to how certain companies become culturally elevated regardless of whether their operating structure still aligns with earlier boutique assumptions.

Some companies originally associated with boutique positioning now operate with substantial infrastructure, broad distribution, major production capability, and extensive market penetration while still retaining strong boutique association emotionally and culturally. Part of that persistence comes from accumulated recognition systems. A cigar repeatedly discussed, reviewed, ranked, displayed, recommended, photographed, reposted, and circulated across digital and community-facing ecosystems gradually acquires legitimacy beyond the cigar itself. The brand begins carrying expectation before the consumer even smokes the product.

Those cycles do not always reflect operational structure. They reflect accumulated recognition, and the comparison groups repeatedly showed that recognition can preserve boutique association long after structural conditions change.

CHAPTER 22
DISTRIBUTION AND THE DURABILITY TEST

WHOLESALE, DISTRIBUTION, AND THE MOVEMENT PROBLEM

The wholesale and distribution perspective pulls the boutique conversation away from humidor atmosphere and back toward physical infrastructure. Once cigars enter distribution, they are no longer judged only by blend, packaging, story, identity, or founder presence. They must survive freight, warehousing, sales support, compliance, retailer practicality, margin structure, reorder expectations, and long-term movement.

Several wholesale contributors approached boutique through infrastructure realism and operational durability. Strong cigars and authentic identity may still struggle commercially if the surrounding support systems lack enough scale, coordination, or operational depth to sustain movement. One experienced operator with both retail and wholesale backgrounds described this imbalance directly, explaining that while the market is not closed to boutique brands, it is not truly level either. Smaller or boutique-positioned brands may possess strong cigars, distinct identities, loyal followings, and real cultural energy while still operating at a disadvantage against companies carrying deeper inventory, broader recognition, stronger sales infrastructure, and more established retailer confidence. Quality alone is not enough. Freight has to be paid, inventory has to be warehoused, sales representatives have to travel, retailers have to reorder, and cigars have to move consistently enough to justify the infrastructure surrounding them.

Another wholesale contributor emphasized that distribution involves far more than product placement alone, observing that a distributor is not simply buying cigars and dropping them on a shelf. Other operators grounded distribution in regulatory and structural realities rather than purely commercial preference. In some states, distribution is built directly into the regulatory system, where state laws mandate that retailers purchase from in-state distributors to ensure compliance with local regulations. Distribution involves compliance handling, logistics coordination, regional infrastructure, and the practical question of whether smaller stores can maintain direct relationships across a fragmented manufacturing landscape. As one contributor explained, distributors allow smaller retail outlets to represent a range of companies that would be impractical for larger manufacturers to service directly.

Other wholesale contributors focused on the tension between access and support. One operator noted that smaller brands want the reach of distribution but do not always want to surrender the margin or provide the

support necessary to create movement. Another pointed toward the same pressure from the retailer side, where wholesalers often become the bridge between manufacturer portfolio expectations and retailer shelf reality. Many retailers appreciate being able to buy the cigars they believe will move without taking on an entire catalog simply to gain access to a few desirable lines.

That tension becomes more visible when account requirements enter the picture. Larger manufacturers may want a meaningful representation of their portfolio in the store, whether through a certain number of facings, minimum purchases, opening-order requirements, or continuing account commitments. From the manufacturer's side, there is logic behind it. Sales calls, shipping, inventory, account service, events, and representative time all cost money. Sending a representative across a territory to sell one or two boxes at a time is difficult to justify, and a manufacturer naturally wants enough presence in an account to give the relationship a reasonable chance to produce volume.

The retailer is looking at the same arrangement from the opposite side of the humidor. Several required facings can consume a meaningful amount of shelf space and purchasing capital before the first cigar is sold. A store carrying obligations to several major manufacturers can find much of its available inventory committed before an independent representative walks through the door. The retailer may like the cigar being presented and still have nowhere sensible to put it without reducing something else that already sells. Chapter 20 approached that problem from inside the humidor. Distribution exposes the other side of it: the manufacturer also has to decide whether the size of the account justifies the cost of servicing it.

Neither position is especially unreasonable, which is precisely why the problem is difficult. The manufacturer wants enough business to make the account worthwhile. The retailer wants enough flexibility to build a humidor around his customers rather than around supplier requirements. The larger company can often offer recognition, established demand, sales support, inventory depth, events, and dependable replenishment in exchange for that commitment. A smaller company may ask for much less space, but it may also arrive without the recognition or support structure that helps the retailer move the cigar once it gets there.

REGIONAL STRENGTH IS STILL STRENGTH

Brand recognition is not distributed evenly across the United States. A company can be highly established in the Northeast, Southeast, Midwest, or Pacific Northwest while remaining unfamiliar in other parts of the country. That unevenness is particularly common among smaller manufacturers whose growth followed relationships, distributor reach, travel patterns, local events, or a concentration of supportive retailers rather than a national advertising plan.

Regional strength should not be mistaken for national weakness. A brand that moves consistently inside a defined territory may possess a more durable market than one that appears briefly in many states without establishing repeat business anywhere. Boutique and independent companies often grow through clusters before they grow through maps.

WHEN THE MANUFACTURER ENTERS THE RETAILER'S TERRITORY

Role overlap also moves in the opposite direction. Retailers are not the only participants crossing traditional boundaries. Manufacturers increasingly sell directly to consumers through their own websites, clubs, subscriptions, events, or special releases. Direct sales can solve access where no practical local shop exists and can give a smaller company revenue, customer information, and reach that traditional distribution may not provide.

The tension changes when the manufacturer competes directly with retailers that invested shelf space, purchasing capital, staff labor, events, and credibility to build the brand's customers. The conflict becomes sharper when desirable cigars are reserved for direct sale, direct pricing undercuts the store, or the retailer network is used to create recognition before consumers are redirected toward the manufacturer.

Manufacturers are understandably protective of their territory. Retailers are allowed to notice when the manufacturer enters theirs.

Many smaller companies seek the visibility, reach, and legitimacy of broader distribution while underestimating the investment required to survive inside it. Several contributors emphasized that boutique-positioned cigars perform best in environments built around discovery and hand-selling. Outside those environments, recognition itself becomes operational leverage, and an excellent cigar remains at a disadvantage when the average consumer does not recognize the name on the band.

This separates boutique as emotional recognition from independent operational durability. Boutique may describe how a cigar is discovered, discussed, pursued, or emotionally recognized. Independent describes something harder and far less romantic: whether the company behind the cigar retains enough control, discipline, infrastructure, and operating capacity to survive after the initial signal reaches the market. A company can be culturally boutique and operationally fragile, while another can appear less romantic and prove considerably more durable commercially. Distribution is one of the places where that separation becomes visible.

Several wholesale contributors also reframed distribution as a market-testing mechanism rather than simply a delivery system. It tests whether the cigar, price, supply consistency, support structure, and reorder behavior can survive outside highly supportive discovery environments. One contributor described distributors as helping manufacturers release, test, and move products more efficiently than many retail channels could support independently. Many companies now viewed as established major players reached that position through years of investment, margin sacrifice, retailer support, operational refinement, and visibility work rather than immediate recognition. As one operator explained, those established entities became larger brands by making sacrifices over time.

Getting into distribution is therefore not the finish line. It is the beginning of another investment cycle.

Several contributors also suggested that distribution itself may continue evolving as boutique fragments into companies carrying very different support capacities. One operator proposed that traditional distribution may eventually move toward something closer to brokerage and curated placement for smaller brands. Under that model, distribution would become more selective, regionalized, portfolio-driven, and dependent on matching specific companies with the retail environments most capable of supporting them.

EUROPE, CHINA, AND A CHANGING MARKET

The international market requires the same regional caution. China was Habanos S.A.'s largest national market by sales value in 2024, followed by Spain, Switzerland, the United Kingdom, and Germany. Europe, however, remained the company's largest region and accounted for 54 percent of sales value, compared with 24 percent for Asia Pacific. [21] Habanos has not abandoned Europe for China. The balance of demand has changed, but Europe remains central to the Cuban business.

What has opened is not an empty European humidor but a competitive opportunity. Higher Cuban prices, inconsistent availability, and changing allocation patterns have given manufacturers from Nicaragua, the Dominican Republic, Honduras, and elsewhere more room to earn attention from European retailers and consumers. Boutique and independent companies are not replacing Cuba as one unified category. They are competing for space that European smokers once treated as more securely Cuban.

Their participation at InterTabac in Dortmund makes that change difficult to dismiss as an American interpretation being exported overseas. The fair describes itself as the world's largest trade show for tobacco products and smoking accessories and advertises more than 800 exhibitors from roughly seventy countries for 2026. [22] Boutique and independent manufacturers increasingly appear there as active international participants, not curiosities visiting somebody else's market.

Across the wholesale comparison group, contributors repeatedly returned to the same conclusion: a cigar is not only made; it must also move.

ANALYST NOTE

The idea of distributors becoming "brokers for boutiques" would require more than a sales adjustment. It would require curated portfolios, regional account matching, stronger sell-through data, education support, compliance handling, shared logistics, and closer alignment between brand capacity and retailer fit. In that model, distribution would function less as broad access and more as selective market placement.

CHAPTER 23
THREE ROOMS, ONE WORD

By this point, the disagreements across sectors no longer looked random. Manufacturers, retailers, and media contributors were not simply using boutique incorrectly. They were using it to describe different things.

Manufacturers generally approached the word from inside the company. Their concerns involved tobacco, production, scale, authority, identity, inventory, growth, manufacturing relationships, and operating control. Retailers approached it from inside the humidor, but the humidor turned out to be more than inventory. Their concerns involved shelf space, customer curiosity, recommendation, hand-selling, price, turnover, reorder behavior, supplier expectations, staff influence, clientele, and the identity of the shop itself. The owner may begin with a particular vision, but that vision is continuously reshaped by what customers request, what employees can sell, what manufacturers require, and what earns enough repeat business to remain. The retailer is therefore managing both merchandise and place.

Media and community voices approached boutique through meaning. Their concerns involved discovery, identity, accessibility, narrative, cultural attachment, scarcity, participation, and visibility. Wholesale and distribution added another pressure: durability. Their view was less concerned with how the cigar felt culturally and more concerned with whether the company behind it could support freight, warehousing, sales coverage, account service, margins, retailer commitments, and continuing movement.

The same word was therefore being asked to describe operating structure, purchasing experience, cultural meaning, commercial survival, and even the environment in which the cigar was encountered. That helps explain why people can use boutique every day without agreeing on what qualifies.

A retailer does not need a mathematically stable definition to tell a customer, "If you like that, try this smaller boutique brand." A media outlet does not need production records to describe a release as part of the boutique scene. A consumer does not need an ownership chart to feel attached to a founder or to the community surrounding a cigar. A manufacturer, however, may hear the same word and think about factory size, tobacco access, independence, decision authority, or production volume. A distributor may hear it and immediately wonder whether the company can support the account after the first order.

The retail record adds another complication. The customer may encounter the cigar online, hear about it through media, buy it from a national retailer, or discover it in a neighborhood shop. Those channels overlap without providing the same experience, and the place where a cigar is found, with its people, recommendations, and fellowship, can become part of what the cigar means.

The language stayed the same. The measurement changed with the room.

Boutique Signals by Market Segment

The term survives across the market, but each segment emphasizes different signals.

MARKET SEGMENT	PRIMARY SIGNALS	SECONDARY INFLUENCES	WHERE BOUTIQUE STILL FUNCTIONS	WHERE THE SIGNAL MISLEADS
Manufacturers	Scale, authorship, production control	Tobacco access, factory relationships, operational maturity	When describing specialized, principal-directed companies or projects	When identity or reputation is allowed to stand in for operating discretion and production authority
Retailers	Inventory movement, differentiation, shelf politics	Staff trust, hand-selling labor, customer discovery	As humidor shorthand for "try this"	When humidor shorthand is mistaken for a complete structural classification
Media	Visibility, narrative identity, access to principals	Rankings, review culture, audience expectations	As storytelling and discovery language	When visibility or narrative is treated as operating structure
Wholesalers / Distributors	Volume, logistics, consistency	Risk tolerance, portfolio balance	When describing small, emerging accounts and introductions	When boutique identity outpaces operational reliability
Consumers / Community	Perception, exclusivity, identity, belonging	Scarcity, hype cycles, social media	As a cultural signal	When perception is treated as a structural verdict

Boutique remains recognizable across the market, but different segments emphasize different signals.
Confusion begins when one segment's signal is allowed to stand for the entire classification.

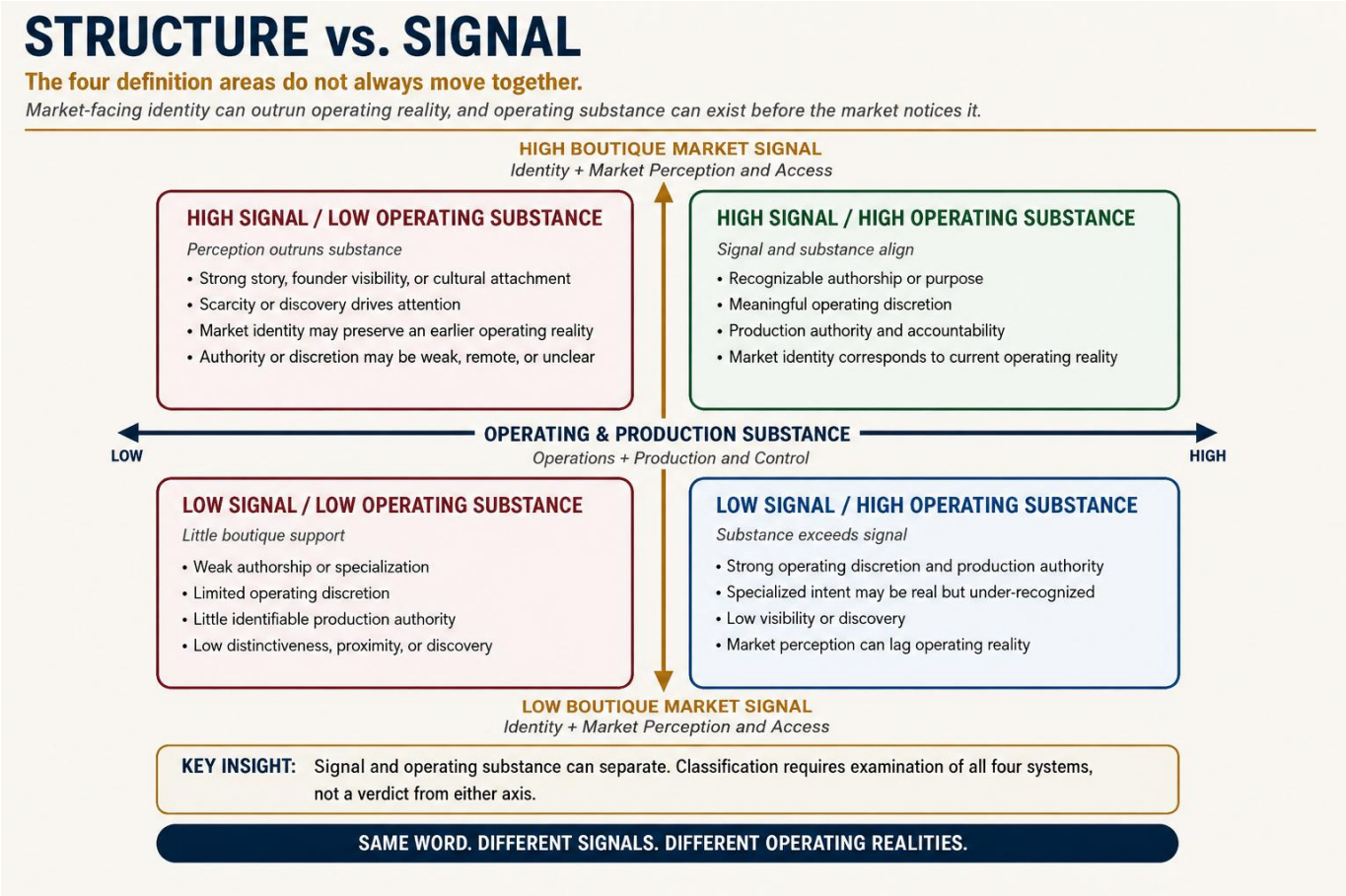
SIGNAL, NOISE, AND STRUCTURE

The differences among these groups suggest another way to understand why boutique has become difficult to use precisely. The signal remains strong: consumers hear intimacy, scarcity, personality, craftsmanship, independence, or discovery; retailers hear differentiation; media hear story and access; manufacturers may hear control, scale, tobacco, authorship, or independence. What changes is what each group believes the signal points toward.

Noise accumulates when association is allowed to substitute for evidence. Small production becomes craftsmanship. Scarcity becomes exclusivity. Founder visibility becomes authority. Limited distribution becomes restraint. Independence becomes authenticity. Social-media attention becomes cultural importance. None of those associations is necessarily false. None proves the underlying condition by itself.

Beneath both sits structure: what the company, brand, or cigar actually is. Who owns it? Who controls the blend and tobacco? Who can stop production? How broad is distribution? How close are the principals to the product, retailers, and consumers? Signal and noise explain how boutique is communicated; structure asks whether that communication still corresponds to operating reality.

That separation allows boutique to retain cultural meaning without forcing it to perform structural work. The retailer really does experience discovery and shelf differentiation. The consumer really does experience intimacy or exclusivity. The manufacturer really does confront questions of control and scale. The distributor really does confront volume and reliability. Trouble begins when one of those signals is promoted from a piece of evidence into the entire classification.



CHAPTER 24
MAKING THE ROOM BIGGER

The original twelve were a proximity sample. That description is important because I do not want to retrofit scientific neutrality onto a group chosen largely because they were close to my own experience. Their disagreement was significant, but another possibility had to be considered: perhaps the disagreement reflected the circle itself.

The next manufacturer phase deliberately widened the field. I wanted companies operating at radically different scales, companies that owned factories and companies that did not, vertically integrated manufacturers and contract-production brands, experienced veterans starting over, younger companies still building infrastructure, institutional brands, independent manufacturers, companies that deliberately limited growth, and companies whose cultural influence was larger than their physical footprint.

The first group had established a baseline through substantially similar questions. As specific disputes surfaced, later interviews became more targeted. Once factory ownership became a problem, there was little value in pretending every contributor needed the same generic question. Once experience, corporate platforms, cultural authorship, vertical integration, or deliberate scarcity became analytically important, the questions had to pressure those specific problems.

The process evolved from broad comparison into targeted stress testing. The purpose was not to recruit enough people to create consensus. It was to see whether the original disagreements survived a much harder comparison group. They did. Now the questions could take over.

PART IV
TWENTY QUESTIONS FOR THE MANUFACTURERS

ACT I — WHAT ARE WE EVEN TALKING ABOUT?

CHAPTER 25
QUESTION 1 — WHAT IS BOUTIQUE SUPPOSED TO MEASURE?

The premium cigar industry uses the word boutique with remarkable confidence for a term it has never been especially good at defining. It appears in retailer conversations, reviews, advertisements, trade-show discussions, podcasts, press releases, and ordinary conversations between smokers. A company is boutique; a factory is boutique; a cigar is boutique; a blend is boutique. Sometimes a company with a handful of employees gets the label, and sometimes a brand producing millions of cigars does. Sometimes the cigar is made in a tiny factory, and sometimes it comes from a factory producing enormous volumes for companies of every size.

The word survives all of it. Before deciding whether that is a problem, there is a simpler question: what is boutique supposed to measure? If it is merely a compliment, there is not much to investigate; it becomes another pleasant adjective attached to premium cigars, somewhere between artisanal and passionate. Those words may communicate a feeling, but they do not classify much of anything.

If boutique is supposed to distinguish one kind of cigar company from another, then it has to identify something. The manufacturers themselves do not offer a single answer, but what they do offer is a pattern. James Brown strips away one of the easiest assumptions immediately. Brown understands the importance of branding; his companies have some of the most recognizable visual identities in the market, and he openly acknowledges the relationship between that identity and the people who connect with it. Yet when he turns specifically to boutique, he moves away from the artwork and toward the work underneath it. For Brown, boutique is about "dedication to craft."

Brown sharpens the split when he considers the opposite case. A small company can create attractive packaging, make a limited number of cigars at a large factory, use tobacco already employed in mass production, and present the finished product with all the visual signals consumers associate with boutique. Brown does not accept that presentation as proof. Small batches and good graphics cannot manufacture craftsmanship after the fact. His standard begins with raw materials, how those materials are treated, how willing the maker is to experiment, and whether the product exists because somebody had an idea worth pursuing rather than because a portfolio needed another SKU.

Andre Farkas approaches the question from a similarly product-centered direction, but he expands it into an operating philosophy. He describes Viaje as a small-scale producer committed to quality over quantity, yet size is not where his definition ends. His projects begin with tobacco, curiosity, a farm, a leaf, or sometimes a single bale. If the tobacco cannot support the cigar he has in mind, the project waits or disappears. That is a very different business logic from beginning with a production target and forcing the tobacco to satisfy it.

Farkas eventually reduces his view to a sentence: "Boutique is not a size. It is a mindset."

That sentence sounds broad enough to create another problem until the rest of his answer supplies the conditions. His mindset is not an inspirational poster hanging over the rolling floor. It requires process over scale, relationships over supply chains, expression over mass appeal, and a willingness to allow the product itself to interrupt the commercial plan.

Sébastien Decoppet, Founder of Cavalier Genève Cigars, goes even further. He thinks the word has become corrupted because it lacks a clear definition. His preferred alternative is almost brutally simple: "Boutique should have meant craft."

Craft, in Decoppet's own wording, "focuses on the approach, the why, the how, and the result of all of this." That removes much of the argument over corporate size and asks a harder question than smallness: what actually happened between intention and finished cigar. A company cannot satisfy it by shrinking the production number or improving the artwork.

Terence Reilly, Vice President of Aganorsa Leaf, reaches nearly the same destination from a factory perspective. He places boutique in the process rather than the name on the box. Using process as the test creates an immediate complication for anyone trying to classify companies by their logos. A small brand can work with a much larger manufacturer and still produce something specialized, experimental, or genuinely limited if the tobacco and process justify the description. Conversely, putting a small company's band around overruns or ordinary production does not magically transform the cigar. Under that definition, boutique can belong to the cigar without necessarily belonging to the factory.

Giselle Herrera, President of El Titan de Bronze Cigars, makes the idea more physical. "To me, boutique isn't defined by size alone. It's defined by intention."

At El Titan de Bronze, intention does not remain abstract. "At El Titan de Bronze, boutique means being hands-on," Herrera says. "Every bundle and every box—we know exactly who rolled it." The people directing the operation remain close to the people making the cigars, and the product keeps a direct line back to identifiable hands. Whether the industry wants to call that boutique or not, it marks a real difference in how close the people directing a company remain to the work.

Erik Espinosa, President of Espinosa Premium Cigars, describes that proximity through authority rather than factory size. When asked whether boutique ever really existed as a meaningful category, his first reaction was to challenge the measurement itself: Is it sales? If so, how small must the number be?

His own answer goes elsewhere. "I consider us boutique in the sense that we're hands on. We're not corporate."

The practical advantage, in Espinosa's view, is speed and direct authority. A decision does not have to travel through layers of approval before somebody can act. The person responsible for the product is close enough to the decision to make it. Jon Huber pushes the category toward identity. For Huber, boutique is more about the ethos of a brand than its production volume, company size, or annual revenue. He associates the category with recognizable human beings standing behind brands rather than anonymous structures in which responsibility becomes difficult to locate.

That does not contradict Brown, Farkas, Reilly, Herrera, or Espinosa as much as it initially appears. All of them are describing some form of proximity. Brown describes proximity to the materials; Farkas describes proximity to the tobacco and creative decision; Reilly describes proximity to process; Herrera describes physical proximity to production; Espinosa describes proximity to authority; Huber describes proximity to authorship.

Boutique, in its strongest form, appears to tell the consumer that the cigar remains close to the people responsible for it. A smaller organization can make that easier because it naturally has fewer layers, but scale is not the same thing as proximity.

A tiny company can be far removed from the cigar it sells, while a large operation can exercise extraordinary control over tobacco, fermentation, blending, aging, and quality. The manufacturer responses therefore do not suggest that boutique means nothing. They suggest that the word is trying to describe something real while carrying too many versions of it at once: craft, process, intention, control, independence, authorship, personality, and production volume.

CHAPTER 26
QUESTION 2 — HAS BOUTIQUE EVER MEANT THE SAME THING?

It would be convenient if the history were simple. Boutique once meant one thing, everybody understood it, and then the market grew, marketers got hold of the word, and the definition collapsed. There is only one problem with that story: the people who were there do not remember the same definition. **Lew Rothman, Founder and Former CEO of JR Cigars,** remembers boutique partly through retail economics. In his account, boutique brands were attractive to local tobacconists because they were largely absent from discount and mail-order channels. The retailer could promote something different without watching the same customer find the same cigar at a volume outlet for less money.

A tobacconist, he recalls, "could then promote the boutique item without the fear of their customer being stolen by volume outlets selling the same goods for less." The distinction concerned distribution, channel protection, retailer opportunity, and scarcity within a particular selling environment. Rothman is not claiming those cigars were inferior. He is saying the word's original commercial usefulness lay in identifying products that lived differently in the marketplace, a very different origin from the later idea that boutique certified artistry.

Then the marketplace changed, and Rothman is wonderfully unsentimental about what happened next: "As the number of so called 'boutique' cigars proliferated importers and manufacturers moved on to 'limited editions' which as anyone with half a brain realizes are now available in an unlimited and never-ending number." The joke works because the pattern is familiar. Once a label of distinction becomes commercially useful, the market reproduces the distinction until it needs another label.

Dr. Paul B.K. Garmirian, Founder of PG Cigars, remembers another version of the same period. PG Cigars emerged in 1990 after decades in which he had developed a deep relationship with premium cigars and then published *The Gourmet Guide to Cigars*. When a cigar bearing his name entered the market, it was labeled boutique. He did not enter the business planning to produce millions of cigars; the operation was small, the production limited, and the relationships personal. Yet even Garmirian describes the boutique concept as "ambiguous and vague."

His recollection is that many smaller startup companies entering the market used the label, some hoping to grow large enough eventually to leave it behind. PG Cigars made a different decision. By 1996, the company was selling roughly 720,000 cigars, demand exceeded supply, and Garmirian and his son Kevork consciously decided not to chase every available account. They stayed, in the company's own phrase, "Small by Choice."

Garmirian's conclusion is direct: "The term 'boutique' changed drastically after the boom." That observation carries weight because it comes from somebody whose company was actually placed inside the category before the boom transformed the market.

Sébastien Decoppet arrives at the modern end of that history from another direction: "Boutique is not defined by a clear definition and has therefore now slowly been corrupted as a term." Corrupted may sound harsh, but it captures what happens when a useful word gains applications faster than it gains boundaries.

Ernesto Pérez-Carrillo approaches the historical difference through environment rather than definition. The first wave of smaller independent companies had fewer tools. Word of mouth carried enormous weight, and cigar media was narrower. Brands developed slowly, cigar by cigar, line by line, retailer by retailer. A modern brand enters a different world. Social media, cigar media, festivals, clubs, events, factory trips, podcasts, and instant communication can place a new name in front of thousands of consumers almost immediately. Pérez-Carrillo does not argue that one period was better. He makes a more useful distinction: "Both groups can still share the word, but they do not share the same origin story."

That is the historical problem in one sentence: the same term survived while the conditions beneath it changed. **Christian Eiroa, Founder of CLE Cigar Company and Eiroa,** raises an even more inconvenient

possibility: maybe boutique was never as central to traditional cigar makers as later industry memory suggests. Christian Eiroa remembers boutique as language from the late 1990s that he never particularly warmed to. He was trained by older cigar men whose vocabulary was more direct. They made cigars, built brands, and worried about tobacco, process, employees, production, relationships, and whether the cigar earned its place. “We make cigars and never thought of them as anything other than a brand or a cigar.”

That does not mean boutique was imaginary; it means the industry should be careful about projecting a modern category backward and assuming everyone living through an earlier era organized the business around it.

Steve Saka attacks the same assumption from the opposite direction. He says he has always found boutique “very nebulous” as a cigar-industry term. In his view, people assign their own interpretations to it, and none of the common measurements settles the issue. Company age does not do it; valuation does not do it; production quantity does not do it. Small brands can be made in huge factories, and huge companies can make genuinely tiny batches. Saka does not merely argue that the definition changed; he questions whether the definition was ever stable enough to deserve the confidence placed in it.

Jon Huber expresses almost the same fatigue with less interest in rescuing the terminology: “Boutique is one of those terms that gets tossed around so much in this industry, like ‘passion,’ that the term holds little true meaning other than what it means to the individual.” The underlying qualities may be real enough; the vocabulary has stopped policing itself.

Even if the industry never possessed one universally accepted definition, contributors can still identify moments when the modern use of boutique changed direction. Huber points to Tatuaje: “For me, though, the biggest game-changer in the boutique sector was and always will be Pete Johnson.”

Huber dates that shift to Tatuaje's arrival in 2003, when consumers became increasingly receptive to smaller brands driven by an individual vision rather than established legacy-name loyalty. He places Dion Giolito, Andre Farkas, Matt Booth, and Crowned Heads among the companies that followed through the opening Johnson helped create.

That does not establish 2003 as the birth of boutique. The evidence has already shown that the values and even the terminology predate it. What it does identify is a recognizable transition in the modern boutique market, when founder-driven micro brands became a more visible consumer category.

Giolito describes what happened next. Companies of radically different sizes learned to fit boutique into whatever narrative suited their operations. A tiny business could use it, a multinational company could use it, or a company could attach the word to a particular project even when the organization behind that project looked nothing like the structure consumers traditionally associated with boutique. “In essence, the word ‘boutique’ has been diluted.”

There is a particular historical irony in Giolito making that observation. Illusione itself was once held up in cigar media as nearly an archetype of boutique production. The company’s deliberate development process, limited experimental production, patience with blends, and resistance to constantly expanding the portfolio fit the image almost perfectly. The man associated with one of the category’s clearest examples now looks at the word and sees dilution. **Mel Shah, Founder of MBombay Tobacco,** gives the before-and-after account without needing a historical lecture. He stepped away from the industry and later returned: “When I stepped away, boutique mostly meant small production.”

What did he find on returning? “Now, in many cases, it’s become positioning. Something you say, not something you prove.”

The shift is not from one universally accepted definition to no definition; the word accumulated jobs. Boutique could describe limited production, a startup, protected retail, independence, founder direction, experimental

production, a feeling of discovery, or eventually the way a company wanted consumers to perceive it. Those meanings overlapped for a time, then the market expanded and the overlaps weakened.

The word remained because it continued doing useful work even after the conditions underneath it stopped moving together.

CHAPTER 27
QUESTION 3 — WHO GETS TO DECIDE WHAT IS BOUTIQUE?

Industries usually make classification easier by establishing some authority over the classification. Wine has appellations, governments define regulated product categories, trade organizations create standards, manufacturers publish specifications, and even sports leagues eventually produce rulebooks thick enough to injure somebody. Boutique has none of that. There is no governing body deciding when a cigar company enters the category, no annual production figure agreed upon by manufacturers, no ownership test, no distribution limit, and no certification stamped on a box declaring that the product contains the legally required percentage of boutique. The word belongs to whoever happens to be using it.

Skip Martin says exactly that: “I honestly do not know what ‘boutique’ means in the context of cigars. I think different people mean different things when using the word.”

Martin personally uses a much narrower definition than most of the market: “For me, a real boutique brand is a small private-label brand made for a single retailer.” Most of the industry would consider that unusually narrow today, but its narrowness is what makes it useful. Martin demonstrates how dramatically the category can change depending on who is holding the ruler.

He then points out why ordinary market usage becomes difficult to defend. Many brands commonly described as boutique are produced in factories making hundreds of thousands of cigars every day. Meanwhile, plenty of very small brands and very small factories fail to produce cigars that live up to the positive qualities consumers assume when they hear the word. Size cannot resolve it, factory size cannot resolve it, and quality cannot be assumed from it.

Martin finally reaches the unavoidable conclusion: “What separates one group from another is really whatever the person using the word means when they use it.”

That is an extraordinary amount of authority to give a word with no governing definition. **Justin Andrews, New Business Development Manager at Scandinavian Tobacco Group,** speaking from the unusual position of Diesel inside the company, helps explain how the problem survives: “A brand has two identities, one is internal and one is external.”

Andrews also gives Diesel a revealing historical placement inside that structure: “Diesel was the only ‘boutique’ brand in STG’s portfolio.” The statement sounds contradictory only if corporate ownership is assumed to settle identity automatically. Inside the same organization, one brand could be positioned, operated, and experienced differently from the others.

Internally, a company knows its ownership, resources, production relationships, budgets, distribution systems, decision-making structure, and corporate support. Externally, the consumer sees something else: a band, a name, a personality, a story, a cigar, perhaps a factory association, and whatever reputation has accumulated around those things. Those identities can diverge.

Diesel benefits from what Andrews openly calls “the machine that is STG.” That is real, and so is the independent personality consumers associate with Diesel. The institutional platform and the market-facing identity exist simultaneously.

Which one gets to decide whether the brand is boutique? If the corporate structure decides, the answer may be obvious; if consumers decide by what the brand feels like, the answer can be entirely different. Matt Booth pushes the external identity even further. He acknowledges that endless definitions can be attached to boutique, but his own version is emotional and human. A boutique brand, in Booth's simplest formulation, "feels human."

It is tangible; it has a soul. That description cannot be audited from an annual report because it lives in perception. Consumers recognize personality, authorship, attitude, humor, inconsistency, risk, and the sense that an actual human being is making choices behind the product. The market can therefore grant boutique identity to a brand even when the underlying corporate structure complicates the label. Authority cannot be settled by simply declaring that manufacturers should define themselves.

Companies have an obvious interest in their own classification. Boutique carries positive associations in the premium cigar market: craft, discovery, limited availability, authenticity, personality, independence, and attention to detail. A company allowed to award itself that language without evidence is not participating in classification; it is participating in marketing. Retailers supply another kind of authority: they see how products move, know which companies are accessible, which owners show up, which brands disappear after an initial burst, which lines require explanation, which ones generate repeat purchases, and which supposedly boutique products arrive with all the intimacy of a shipping container.

Retail judgment is practical because shelf space has consequences. Consumers exert a different kind of authority because language eventually belongs to the people using it. A manufacturer may be describing structure, a retailer market position, and a consumer experience. All three can use boutique accurately according to their own meaning while describing three different things, and nobody is lying merely because the definitions differ.

That is the category's authority problem. The inconsistency appears only when the industry treats those individual judgments as though they belong to one shared classification. They do not. The market has effectively created a word whose definition is negotiated every time it is used. That flexibility is probably one reason boutique survived, and it is also why the term can no longer settle many of the arguments in which it appears.

CHAPTER 28
QUESTION 4 — CAN SIZE DEFINE BOUTIQUE?

Size is irresistible because size can be counted: annual production, retail accounts, employees, countries of distribution, and factory capacity can all be measured. Finally, after all the talk about soul, ethos, intention, authenticity, and mindset, here comes a number. Then somebody asks how small is small.

Casey Haugen, Vice President of CRUX Cigars, asks the question in the form the industry usually avoids: "what is a small batch in the cigar world..." A number can be useful only after somebody agrees where the number stops meaning one thing and starts meaning another. The cigar business has never reached that agreement.

The relief does not last long. **Glen Case, Founder of Kristoff Cigars,** offers one of the clearest numerical views in the manufacturer record: "In my view, a boutique brand is one that may be producing a few hundred-thousand cigars a year."

Case is willing to apply his own threshold to his own company: "Kristoff surpassed that more than fourteen years ago." That candor matters. A size definition has little value if every successful company somehow remains exempt from the point at which the definition would exclude it.

Kristoff expanded throughout the United States and into roughly sixty countries outside it, and Case does not present that as an apology. He had already stated publicly that he no longer believed Kristoff should be

considered boutique, and when asked directly where the point of departure occurred, his answer matched the threshold he had just drawn.

There is something appealing about Case's position because it actually draws a line. The industry desperately wants boutique to distinguish smaller companies from larger ones, and Case is willing to say that at some point a company can simply become too large for the word to remain useful at the company level. **Jonas Santana, President of Blackbird Cigars,** rejects the simplicity of that conclusion without dismissing scale entirely: "Size alone does not accurately define what it means to be boutique."

Santana focuses instead on whether a company has enough discipline to control production in order to preserve standards. Under that approach, annual volume is relevant because volume creates pressure. The important measurement is whether the company allows the pressure to dictate the cigar. Case treats scale as part of the boundary, whereas Santana treats restraint as the evidence. **Daniel Lance, Founder of Domain Cigars,** moves between the two positions by describing what size eventually forces a company to become: "The line is operational reality."

Lance offers something more useful than a boutique cutoff. He identifies a point at which scale begins forcing structural change: "Around the one million cigar per year mark, a brand is effectively forced to formalize its relationship with production." That number is not a universal law; nobody rolls cigar number 1,000,001 and receives a certificate announcing the death of boutique. What changes is responsibility. At meaningful volume, a company is no longer dealing only with blends and boxes; it is dealing with tobacco commitments, inventory, manufacturing capacity, agricultural cycles, working capital, quality control, distribution obligations, retailer expectations, and the consequences of failing to coordinate them. Informal arrangements become harder to maintain, and production relationships, scheduling, forecasting, and accountability begin requiring more structure. Scale therefore matters even if it cannot define boutique by itself.

Growth changes the operating system, which gives size real significance without allowing size to settle the entire classification. Two companies producing the same number of cigars may not operate remotely the same way. One may own a factory and control tobacco inventories, while another may contract production. One may distribute directly, while another may rely on a national partner. One may employ a substantial sales force, while another may depend on its founders to visit accounts personally. One may make a permanent national portfolio, while another may move through a series of limited projects dictated by tobacco availability.

A production number cannot describe all of that. The strongest argument for size is therefore not that small automatically equals boutique, but that scale creates structural consequences. More cigars require more tobacco; more tobacco requires greater planning; greater distribution creates more obligations; more employees create layers; and more markets create logistical demands. Success can put distance between the founder and individual cigars simply because one person can no longer touch everything.

However, scale can also do the opposite of what boutique mythology assumes. Greater resources can allow a company to hold deeper tobacco inventories, age leaf longer, reject material without threatening the entire production schedule, invest in quality control, employ experienced people, and protect consistency from crop variation.

Smallness can create freedom and vulnerability. Limited capital may narrow options when tobacco disappears, capacity changes, shipments slip, or demand outruns supply; deeper resources can sometimes let a larger company refuse compromises a smaller one cannot afford. Size matters, but it does not behave morally. Growth is not proof that a company stopped caring, and smallness is not proof that it ever cared.

Size measures footprint and some forms of organizational pressure, but it does not automatically measure craftsmanship, intention, independence, quality, or proximity to the cigar. Case is right to give scale classificatory weight, and Santana is right that the number alone cannot tell us what happens inside the operation.

Saka attacks the same problem from the opposite direction: “It doesn’t define the age of a company, nor does it define the valuation of the company or even their production quantity.” Case is willing to let production help draw a boundary; Saka refuses to let the word perform that measurement at all. The disagreement could hardly be cleaner. Size belongs in the analysis, but it cannot carry the classification alone.

CHAPTER 29
QUESTION 5 — IS BOUTIQUE A STAGE OR A BUSINESS MODEL?

Every cigar company has a beginning, and that fact has quietly created one of the biggest problems with boutique. New companies are usually small because they are new. They have fewer accounts because they have not opened more accounts yet, produce fewer cigars because demand has not justified larger production, have deeply involved owners because there may be nobody else available to do the work, and have narrow distribution because distribution takes time to build.

Those characteristics look remarkably boutique, but what happens if the company succeeds? Pete Johnson, Founder of Tatuaje Cigars, has little difficulty answering that question for his own company: “As a company, Tatuaje is no longer boutique. I would classify Tatuaje as mid-tier. Not big, not small, somewhere stuck in the middle. In purgatory.”

Individual Tatuaje releases can still be small-batch or boutique in production, but Johnson separates those cigars from the classification of the company itself. His broader observation is even more revealing: “I think that everyone started boutique and eventually some found a rhythm and success with the retailers, and most importantly the consumers, and we moved out of the boutique space.”

That is boutique as a stage. Under Johnson’s interpretation, a company can begin within boutique conditions and then succeed its way out of them. Nothing immoral happened: the cigars did not necessarily deteriorate, the founder did not suddenly stop caring, retailers ordered more cigars, consumers bought them, and the company developed systems capable of meeting demand. The condition changed. **Lee Marsh, Co-Founder of Stolen Throne Cigars,** sees the same growth and reaches a different conclusion: “Growth is success.”

Marsh’s fuller answer makes clear what he believes growth is allowed to change and what it is not: “Our approach has remained the same since our first cigar dried. Quality and experience over bottom line.” Under that view, production can expand while the governing priority remains intact; the operating condition changes, but the hierarchy of decisions does not have to.

For Marsh, boutique is a mindset that should not disappear simply because production numbers increase. That is boutique as a business model, or more accurately, as an operating philosophy. The distinction between Johnson and Marsh cannot be solved by deciding which man understands his own company better; they are answering different questions.

Johnson is asking what kind of company Tatuaje has become, whereas Marsh is asking whether the behavior that defined Stolen Throne Cigars’ beginning still governs it. One is classifying structure; the other is classifying conduct. **Nick Perdomo Jr., President of Perdomo Cigars,** adds the lifecycle perspective from a company that has traveled far beyond startup conditions: “The boutique name has changed a lot. It used to be a start-up who produced their own cigars in small quantities.” Perdomo includes his own company in that history: “We started that way.”

Perdomo then emphasizes that they made their own cigars, worked, focused on quality, and built the business into what it is today. Under that history, boutique described a real stage of development. Perdomo did not have to reject the principles associated with that stage in order to leave the stage itself. That separation is essential: a company can outgrow smallness without outgrowing discipline, and it can outgrow narrow distribution without outgrowing founder involvement. It can outgrow a startup factory without outgrowing manufacturing control, and it can outgrow boutique as a structural description while retaining behaviors consumers learned to associate with boutique. That is probably why companies resist surrendering the word. The label may begin as a description of operating reality, but over time it becomes attached to identity. Once consumers associate a brand with independence, personality, craftsmanship, experimentation, direct communication, or founder presence, growth does not instantly erase those associations.

The company changes faster than its identity does, creating what might be called the boutique graduation problem. If boutique is a stage, success should eventually move companies out of it. If boutique is a business model, success should not matter as long as the company continues behaving according to the same principles. If boutique is an identity, the market may continue applying the word long after the original operating conditions disappear.

Jonathan Drew represents the persistent-identity side of that problem almost perfectly: “Drew Estate has thrived on many fronts, but we may never truly leave the boutique label behind.” The statement has nothing to do with current factory size. It measures the remarkable half-life of identity. A company can leave its original operating condition years before the market is willing to retire the story attached to it.

All three versions exist in the premium cigar industry, and they cannot all classify companies in the same way. There is another reason the stage question has become harder: modern companies do not all begin from the same starting line.

Michael Herklots, Co-Founder of Ferio Tego Cigars, reduces the lifecycle assumption to its simplest form: “Everyone was a boutique once.” If boutique merely describes the narrow conditions surrounding a beginning, that is almost unavoidable. The harder question is whether every beginning deserves the same description when founders arrive with radically different experience, recognition, access, and expectations.

Some founders enter with years of industry experience, already know retailers, have worked for major manufacturers, understand blending and tobacco, or have access to established factories before their first box reaches a store. Others enter with substantial audiences, media visibility, capital, or reputations earned elsewhere.

Herklots experienced that problem directly with Ferio Tego: “Many retailers and consumers approached Ferio Tego with opinions already formed, rather than with the innocent curiosity most startups enjoy.” A company can be structurally young while its founders are anything but unknown. Modern visibility can eliminate the obscurity that once helped define the traditional boutique path. “Along with the advantage of experience comes the disadvantage of unrealistic expectations, as well as inherited historical bias.”

The traditional story of a boutique company slowly emerging from obscurity no longer describes every new company. **Ian Reith, Founder of Dapper Cigars,** states the modern version plainly: “There’s multiple ways to enter the market today.” That sentence sounds obvious until it is placed beside a category whose mythology still assumes one familiar path from obscurity to recognition. The route itself has diversified. A business can be new without being unknown, a company can be small without being inexperienced, and a brand can have national visibility before it has national distribution.

David West, Founder of Avowed Cigar Company, describes that kind of head start with a chess metaphor: “A brand entering the market with experience and pre-established relationships acts more like a bishop with more paths available to them.” The extra paths are real advantages, but they also make the old startup template less useful. Two companies can be equally young and begin with completely different ranges of motion.

Boutique therefore cannot simply mean young, nor can it simply mean small. Johnson, Marsh, and Perdomo expose three parts of the same lifecycle: boutique can describe where a company begins, how a company chooses to operate, or remain attached to the company after the original conditions change. The persistence is less hypocrisy than evidence that the word has crossed from business classification into identity. And once that happens, leaving boutique becomes much harder than entering it. A company does not merely have to grow; the market has to notice that the thing it has been calling boutique is no longer the thing it originally thought it was describing.

By the end of this section, that is the central problem. Boutique is overloaded language that can point toward craft, process, scale, independence, authorship, history, perception, company maturity, and operating

philosophy. Those ideas overlap often enough for the word to remain recognizable and diverge often enough to prevent the word from functioning cleanly as a classification. A better dictionary definition cannot end the argument. The next step is to look at the businesses themselves: if boutique cannot reliably tell us what kind of company we are looking at, then the company has to tell us.

ACT II — WHAT EXACTLY ARE WE CLASSIFYING?

CHAPTER 30
QUESTION 6 — ARE WE CLASSIFYING THE COMPANY OR THE CIGAR?

One of the reasons boutique becomes difficult to define is that the industry does not always agree on what is being classified. A company can be boutique, a brand can be boutique, a factory can be boutique, a production can be boutique, and, somehow, the individual cigar can be boutique too. Those statements are often used interchangeably even though they describe entirely different things. The problem becomes unavoidable once mature companies begin producing limited projects and small brands begin contracting production through much larger factories. If the company determines the classification, the answer follows the organization; if the cigar determines it, the answer may change from one release to another.

René Castaneda, President of Villiger North America, approaches boutique largely from the cigar itself. His criteria are unusually concrete: he associates boutique with very limited production, often around ten thousand cigars or fewer, but he does not stop at quantity. The cigar should bring something different to the market, which may involve unusual tobacco, a specialized production process, or an idea that is not simply following an existing marketing trend.

Castaneda also draws a line between distinction and trend-following: "The cigar doesn't follow any marketing trend." That does not make every contrarian cigar boutique, but it adds intention to his cigar-level definition. The product should be different because somebody made a different choice, not because the market happened to reward a different costume. "The cigar is bringing something new to the table."

That formulation shifts the unit of measurement. Villiger is not a small startup manufacturer, yet Castaneda's definition leaves room for an individual cigar to possess boutique characteristics because of the way that particular cigar is conceived and produced. Under that model, the company does not have to be boutique for the cigar to be boutique.

Terence Reilly's broader vocabulary reinforces the same point: "Boutique is poorly defined but the word is usually associated with terms like specialized, artisanal, unique, experimental." Those words describe characteristics of a production far more easily than they describe an entire corporation. The adjective becomes more coherent when the noun after it is identified.

Tom Lazuka, Co-Founder of Asylum Cigars, creates the opposite problem: "Asylum is obviously a niche market due to the large ring gauges, but the reality is we make a wide variety of vitolas."

The brand maintains a highly recognizable identity. Consumers know what Asylum represents, and that identity can still create the impression of a specialized company operating somewhere outside the conventional mainstream. Then Lazuka provides the number that disrupts the impression: "From the outside we still look like a boutique brand, but Asylum has built up to close to 3.5 million cigars a year."

That is not a tiny operation. Lazuka does not describe the infrastructure behind that growth as an artistic surrender; he sees it as an advantage. Greater capability gives Asylum freedom to be creative while maintaining the product at a level the company considers first class. Now the classification problem becomes visible. If Asylum is judged as a company, millions of cigars and substantial infrastructure push it away from many traditional boutique definitions. If a specific Asylum project is judged as a cigar, production method, experimentation, specialized identity, or limited availability could pull that particular release back toward the category. Both descriptions can be internally consistent; they are simply classifying different objects. The premium cigar industry moves between those objects constantly.

Calling a cigar "from a boutique company" may tell us more about the organization than the cigar. The cigar itself might have been produced under conditions nearly identical to products made for much larger brands. The reverse is equally possible. A large company can isolate tobacco, authorize a tiny production, use an

unusual process, give a blender considerable freedom, and make something bearing almost every characteristic commonly associated with boutique production. The corporation did not shrink while the cigars were being rolled; the production changed. That separation creates a problem for anyone trying to use boutique as a clean company classification. A company is relatively stable: it has ownership, employees, production relationships, distribution, revenue, infrastructure, and history.

A cigar is temporary. It can be experimental, limited, or use tobacco unavailable for anything larger. It can be created outside the normal production system of the company responsible for it, and it can disappear after five hundred boxes. When the same word is used to describe both the enduring organization and the temporary product, contradictions become inevitable. The cleanest example already appeared through Pete Johnson: Tatuaje, in his view, is no longer a boutique company, yet Tatuaje can still make small-batch boutique product.

Once company, brand, and cigar are allowed to separate, the combinations multiply quickly, and one rule follows: they are separate units of analysis, and boutique does not automatically travel from one level to another.

Treating the levels separately is not evasive; it may actually be more precise than forcing the whole company and every cigar it produces into the same category. Castaneda's answer reinforces the cigar side of the same split, while Lazuka demonstrates how far the company can move while parts of its market identity remain attached to an earlier image. The question is therefore not simply whether something is boutique, but identifying the thing being classified: the company, the factory, the brand, the line, the individual production, or the cigar itself? Until that is made explicit, two people can argue endlessly about boutique while technically discussing different subjects. The industry has spent years doing exactly that.

CHAPTER 31
QUESTION 7 — CAN THE SAME FACTORY MAKE BOTH A BOUTIQUE AND A NON-BOUTIQUE CIGAR?

If the answer to the previous question is that the cigar and the company are not necessarily the same unit of classification, then the next question becomes almost unavoidable: can one factory make both? **Abdel "AJ" Fernandez, Founder of AJ Fernandez Cigars,** provides one of the strongest real-world tests in the entire boutique discussion because his operation refuses to fit neatly into the expected categories. AJ does not operate a tiny workshop making a few cigars for a handful of retailers; his manufacturing operation is substantial, producing his own brands while also working with companies of very different sizes and identities.

Steve Saka supplies the uncomfortable industrial fact behind that argument: "Most cigars, particularly the smallest brands, are made at large, well-established factories." Once that is true, factory scale and brand scale cannot be treated as interchangeable measurements. The small label on the box may be sitting on top of a very large manufacturing system.

AJ does not avoid that contradiction: "It doesn't matter how large your factory becomes, how much production you handle, or the blends you make for big or small brands." His conclusion is that the cigar can retain what he considers boutique character through the work itself: "It will always have a boutique soul and heart because of the dedication you put into your craftsmanship." The claim is sweeping, but at least the proposed standard is visible. AJ is locating the distinction in discipline applied to the product, not in the square footage surrounding it. He reduces the argument further: "Because size does not matter. What matters is dedication and discipline."

There is an obvious objection: if size does not matter at all, then boutique stops functioning as a size classification. That may be exactly what AJ's answer forces the industry to confront. A factory is infrastructure: it contains people, tobacco, fermentation capacity, aging inventory, production lines, bunchers, rollers, supervisors, quality-control systems, and whatever knowledge has accumulated inside the

organization. None of those things requires every cigar made inside the building to be conceived the same way. A kitchen can make a tasting menu and feed a banquet without becoming two kitchens; the relevant difference is what the people inside it are being asked to do. Terence Reilly states the process test much more explicitly: "A boutique cigar is defined by the process rather than the name."

Reilly is willing to apply that logic to a name no one would confuse with a tiny startup: “I would still consider the Cohiba Miami a boutique cigar because it was made at Titan.” The example is useful precisely because the brand name pulls in one direction while the production environment pulls in another. The brand name does not settle the classification; the process does.

Reilly then takes the argument into larger factories: “A small company can certainly go to a larger one and create something boutique using bales which have a distinct flavor but are not numerous enough to produce large runs.” Factory scale and cigar-level production are different measurements. The size of the factory tells us how much the factory can produce, but it does not necessarily tell us how a particular cigar was produced. A large manufacturer can possess a handful of distinctive tobacco that could never support mass production. A blender can isolate that tobacco, construct a specific project around it, limit the run because the material itself imposes the limitation, and supervise the cigar differently from the ordinary production surrounding it. Nothing about the square footage of the building changes that. Reilly also supplies the necessary warning against taking this argument too far: "If a large manufacturer takes some overruns and sells them to a small brand… that is at best superficially boutique."

The phrase sets a hard limit: a small company name does not purify an ordinary cigar, and the label on the box cannot reverse-engineer the process. This creates a much more useful distinction than large factory versus small factory.

James Brown attacks the same loophole from the brand side: "If you’re white labeling products out of a mass production factory, using the same tobacco they use in mass production cigars but you’re making small batches and you have cool branding, does that make the product boutique? It definitely does not." Small ownership, limited quantity, and attractive presentation therefore cannot substitute for a distinct production relationship.

The production itself has to be distinct. Was the tobacco selected specifically for the project? Was the blend actually developed for the brand? Was the production intentionally limited because of material or process? Did the people responsible for the cigar exercise meaningful authority over what was made? Or did somebody locate available inventory, place another band around it, and construct boutique identity afterward? Those are not the same business.

AJ and Reilly arrive at the question from different directions, but their answers overlap substantially. AJ argues that a large operation does not automatically erase craftsmanship, while Reilly argues that large infrastructure can produce genuinely specialized work, but only when the underlying process earns the distinction. Together they demolish one of the easiest assumptions surrounding boutique: factory size alone cannot tell us what the cigar is. In fact, knowing the name of the factory may tell us considerably less than consumers assume.

The same factory can produce a cigar for a major established company, a cigar for a small independent brand, a limited experiment, a permanent national line, and a project using tobacco scarce enough to support only a small production. The walls do not classify the cigars; the work inside them might. That conclusion also carries a warning for small brands: contract manufacturing at a respected factory can provide extraordinary tobacco access, knowledge, consistency, and production capability, but it cannot manufacture authenticity on behalf of the brand owner. If the small company exercises little authority over the blend, tobacco, standards, or finished product, the mere fact that the company itself is small tells us almost nothing. The industry has spent considerable energy asking whether a factory is too large to make boutique cigars, but it may have been looking at the wrong end of the equation. A better question is whether the factory can separate one production from another with enough intention, tobacco distinction, oversight, and discipline that the individual cigar actually deserves to be classified differently.

CHAPTER 32
QUESTION 8 — WHERE DOES CONTROL OF THE CIGAR ACTUALLY LIVE?

A premium cigar can pass through an extraordinary number of hands before the smoker ever sees it. Someone selects seed, plants it, manages the field, cures the tobacco, ferments it, sorts it, ages it, develops a blend, owns the factory, supervises production, approves the cigar, owns the brand, distributes it, and finally sells it.

Then everybody talks about "the maker" as though one person did all of that before lunch.

If boutique is supposed to imply control, the obvious question is where that control actually resides. **Justo Eiroa, President of JRE Tobacco,** begins answering the question before there is a cigar to control. His operation is vertically integrated, giving the company authority over the varieties it plants, including the tobaccos used in the Aladino portfolio. It gives the company the ability to determine how those tobaccos are fermented and how slowly the pilones are managed. Rather than defining boutique directly, Justo Eiroa describes what actual control allows him to do: "Being vertically integrated and controlling the varieties we plant definitely allows us to create and prepare very original blends and tobaccos."

Justo Eiroa ties that authority directly to patience in fermentation: "It also allows us to manage the pilones slowly and gently, without accelerating the process." Control is meaningful because it creates the ability to wait. Vertical integration is not impressive merely because more stages belong to the same company; it matters when that control changes what the company is willing or able to do.

The implication is significant: control begins in agriculture. By the time somebody sits at a blending table, many of the most consequential decisions have already been made. The available tobacco carries the consequences of seed selection, soil, weather, curing, fermentation, aging, sorting, and inventory decisions made months or years earlier. A company controlling those stages possesses a form of authority that a brand buying finished production from another manufacturer simply does not possess.

That does not automatically make the vertically integrated company better, but it makes its control different. **Sam Phillips, President of La Palina Cigars,** approaches the question from nearly the opposite end of the production chain, separating manufacture from stewardship: "To me, ownership of the vision, blending philosophy, quality control standards, distribution, and consumer relationship is what defines a cigar brand."

Manufacturing remains critical in his description, but manufacturing and brand stewardship are not identical jobs. His clearest formulation is even simpler: "A factory can make a cigar. A brand creates a reason for a consumer to seek that cigar out repeatedly."

Justo Eiroa and Phillips are not actually contradicting one another; they are identifying different kinds of control. Justo Eiroa describes material control, whereas Phillips describes authorial control. Those functions can exist in one company, or they can be separated. A vertically integrated manufacturer may control seed, field, fermentation, aging, blending, rolling, quality control, packaging, and distribution. At the other extreme, a brand may own no farm and no factory while still determining the concept, approving the blend, rejecting prototypes, establishing quality standards, directing packaging, controlling distribution, and accepting responsibility for the finished cigar.

Neither arrangement eliminates the contribution of the other people involved. The farmer, the factory, the blender, and the brand all remain important. The trouble begins when the industry compresses all of those roles into the word maker and then assumes that the person whose name is most visible must control everything underneath it. Modern premium cigar production does not always work that way.

There are at least three separate forms of authority worth identifying: manufacturing authority concerns who physically produces the cigar and manages the production process; creative authority concerns who decides what the cigar is supposed to become; accountability concerns who owns the result when the finished cigar

succeeds or fails. Sometimes one company possesses all three, sometimes two companies divide them, and sometimes the arrangement is more complicated than either side particularly wants to explain in a thirty-second conversation at a trade-show booth.

For boutique classification, the third category may be the most revealing. Somebody has to be accountable. A company cannot claim intimate authorship when the cigar is successful and then disappear into the manufacturing relationship when something goes wrong. If the blend changes, who answers for it? If consistency deteriorates, who notices? If the tobacco no longer behaves the same way, who has enough authority to stop production? If the factory proposes a substitution, who can say no? If the cigar fails to represent what the brand promised, whose failure is it?

Those questions reveal control better than factory ownership alone. Justo Eiroa's model gives an unusually direct answer because authority remains concentrated from agriculture through production. Phillips demonstrates why concentrated ownership cannot be the only legitimate model: a brand working with another manufacturer can still exercise serious authorship and stewardship if its authority is real rather than ceremonial. Contract manufacturing therefore cannot be dismissed automatically.

Nick Perdomo Jr. draws the opposite boundary much harder: "If you are a boutique maker, you should make your own cigars, not buy them…" His standard is more restrictive than Phillips's, but that tension is useful because it exposes a real fault line between authorship through stewardship and authorship through physical manufacturing responsibility.

Contract production creates another test that is easy to overlook: what happens when the relationship ends? Who owns the blend formula, production records, molds, packaging specifications, and tobacco commitments? Can the brand take the cigar to another factory, or does the practical knowledge required to reproduce it remain with the manufacturer? A principal may exercise influence while the relationship is healthy and still discover that very little authority travels with the brand after separation.

Portability is not an absolute requirement because tobacco, people, and process cannot always be duplicated elsewhere. It is nevertheless evidence about where control lives. If the cigar cannot follow the company because the factory possesses the decisive knowledge, materials, or authority, the brand's claim of production control is weaker than its public identity may suggest.

Some of the most important cigar companies in the industry have relied on manufacturing partners at different stages of their histories. The question is not merely who owns the building, but who controls the cigar. Ownership can provide control, but it does not guarantee it; contract production can divide control, but it does not necessarily eliminate it. Responsibility has to remain traceable through the chain: when it can be followed, control has a home, and when it disappears, boutique becomes another story printed on the box.

CHAPTER 33
QUESTION 9 — DOES BOUTIQUE REQUIRE INDEPENDENCE?

Independence may be the most emotionally attractive part of boutique. The small company stands outside the machine, the founder answers to nobody, the decisions are personal, and the cigar is protected from committees, quarterly targets, corporate politics, and whatever other horrors humans invented after deciding that a meeting should have another meeting. The story is appealing, but the business reality is more complicated.

Law Ream, Brand Activation Manager for Camacho Cigars, examines that complication through Camacho, whose history crosses exactly the boundary boutique language usually struggles with. Camacho began with an owner-driven identity strongly associated with the Eiroa family, Honduras, and Corojo tobacco. The brand later became part of the much larger Davidoff organization, changing ownership, surrounding resources, and infrastructure. Yet Ream rejects the idea that those structural changes automatically erase everything

consumers originally recognized in the brand: "True boutique spirit lies less in ownership structure or production size than in maintaining a distinct identity with discipline and consistency."

That is a direct challenge to independence as a requirement. Under Ream's interpretation, institutional ownership does not automatically destroy identity. A brand can become part of a much larger structure while retaining enough character, discipline, product consistency, and historical continuity that consumers still recognize something of the earlier company inside it. The obvious problem is determining how much can change before that argument becomes nostalgia.

Ownership matters because ownership controls incentives. A large parent company can provide capital, tobacco, distribution, administrative infrastructure, marketing support, regulatory support, international reach, purchasing strength, and organizational stability. It can also introduce approval layers, financial expectations, portfolio requirements, and institutional priorities that did not exist when the brand operated independently.

Whether those forces change the cigar depends on what the larger company actually does with its authority. **Rick Rodriguez, Founder of West Tampa Tobacco Company,** provides the view from the other direction. He left a large corporate environment to build his own company: "The scariest part of leaving a big company to go on your own is taking that first step."

Rodriguez does not romanticize independence after obtaining it. What he missed immediately were the things large companies are good at providing: "Some of the things you are definitely going to miss include money to produce, market and distribute your cigars... access to a large library of tobacco... and an established national salesforce." Independence returns authority to the founder, but it also returns the bill.

Independence did not suddenly make those needs disappear; it changed who had to solve them. A lean company introduces different advantages: Rodriguez describes a smaller operation as forcing focus because there is little room for excess or waste. Existing retailer relationships can open doors, and factory partnerships can provide access to tobacco without requiring the company to own every leaf in the world. But he also acknowledges the limits of reputation: "This history could only go so far."

That sentence should be remembered whenever independence is treated as a substitute for execution. A founder can leave a major company with relationships, experience, credibility, tobacco knowledge, and retailer access, but eventually the new cigar still has to perform. Ream and Rodriguez expose independence from opposite directions: Ream asks whether identity can survive after independence decreases, while Rodriguez shows what actually disappears when institutional support is voluntarily surrendered.

Taken together, they make independence look less like a moral virtue and more like an operating condition. Independence creates freedom, but it also creates exposure. Erik Espinosa describes the freedom without pretending it is philosophical theory: "We can do things quickly. We don't have to do things through channels of approval." The distance between decision and action is shorter.

The same founder may also be the person worrying about payroll, production deposits, freight, inventory, sales coverage, marketing costs, retailer support, and whether enough cigars will arrive on time to pay for the next round. Large platforms reduce some forms of freedom, but they also reduce some forms of vulnerability. Boutique mythology often treats constraint as authenticity; a company struggling because it lacks capital may indeed become inventive, or it may simply be undercapitalized. A founder personally driving from account to account may create extraordinary retailer relationships, or he may desperately need a sales representative. A tiny tobacco inventory may force creativity, or it may force compromise. Hardship can shape identity, but it is not automatically evidence of craftsmanship.

Regulatory and compliance burdens create another form of pressure. Registration, reporting, packaging requirements, state distribution rules, and the cost of specialized guidance consume money and attention regardless of company size. A smaller manufacturer may accept a distributor, platform, or outside partner partly because remaining administratively independent has become too expensive. That decision does not

automatically end boutique, but it can move discretion away from the people closest to the cigar. The classification turns on what authority moved with the paperwork.

The Camacho case creates the opposite warning: institutional resources can protect a brand, or they can consume it. An acquisition can preserve tobacco identity, product standards, history, and market character, or it could eventually leave little more than a familiar trademark attached to an entirely different operating philosophy. Corporate ownership therefore cannot be treated as neutral: it changes the environment in which authority, incentives, and discretion operate, sometimes dramatically. But ownership alone still does not tell us what survived.

The better distinction is to ask what independence was protecting in the first place: creative authority, speed of decision-making, founder involvement, product discipline, the ability to reject a commercial compromise, or a recognizable identity? If those conditions survive inside a larger ownership structure, then something meaningful survived with them; if they do not, the ownership change may have altered the classification. The result has to be established rather than assumed, and whether a particular cigar or production still qualifies as boutique remains a separate question.

CHAPTER 34
QUESTION 10 — CAN SOMETHING BE BOUTIQUE IF IT IS EVERYWHERE?

Boutique has always carried some relationship with discovery: the consumer finds something outside the ordinary rotation, or the retailer introduces a cigar not sitting in every humidor in the country. The brand feels personal partly because the smoker has not been surrounded by it for years. Scarcity may not define boutique, but it certainly helped create the feeling. So, what happens when everybody knows the name? **Paolo Garzaroli, President of Graycliff Cigars,** offers one answer by deliberately refusing the premise of ubiquity. Graycliff has chosen to limit its footprint: "Graycliff remains boutique and has taken strides to do that by purposely limiting its footprint in the U.S. to forty retailers and internationally to only a handful of clients."

Graycliff could pursue broader presence. Instead, Garzaroli ties the company's identity to selectivity and experience, which moves distribution inside the product architecture itself: access is part of what is being sold.

A Graycliff cigar is connected not merely to tobacco and a band, but to place, hospitality, memory, luxury, and controlled availability. The limited footprint reinforces the experience because consumers are not expected to encounter the company everywhere, giving boutique a scarcity component without reducing it to production volume.

The company can remain selective by choice. Dr. Paul B.K. Garmirian supplied a similar historical example earlier through PG Cigars: demand existed and additional accounts were available, but the company consciously refused some of them. The scale of that choice is clearer in Garmirian's own recollection: "Sales doubled every year from 1991 to 1997 without advertising simply by word of mouth. Demand exceeded supply." Remaining small under those conditions was not an inability to find customers; it was a refusal to convert every available customer into additional scale.

Graycliff reaches the same general principle through a different identity: sometimes not being everywhere is the strategy. **Litto Gomez, Founder of La Flor Dominicana Cigars,** creates the opposite problem. La Flor Dominicana is not one of the giant multinational cigar companies, yet its cultural presence is enormous. Gomez himself expresses uncertainty about where the company fits: "At this moment we make about 4 million cigars of one brand only, LFD. I don't know if that would qualify us to be a boutique or if we are too big for that."

Scale and gravity are not the same thing. A company can become culturally enormous before becoming structurally enormous. Consumers may encounter its cigars widely, retailers may know the brand almost universally, its founders may be among the most recognizable people in the industry, and its products may

accumulate awards, reputation, loyalty, and decades of consumer memory. At that point, the company can feel much larger than its actual production footprint.

La Flor Dominicana demonstrates why distribution alone cannot describe market presence. A company can sell fewer cigars than another company while occupying considerably more mental territory. The reverse also happens: a manufacturer can produce enormous quantities while remaining relatively invisible to the average consumer because much of its work appears under other names. Boutique therefore has another measurement problem: what does everywhere mean? Everywhere in production, everywhere in retail, everywhere geographically, everywhere in cigar media, everywhere in consumer awareness, or everywhere culturally? Those are not interchangeable. Graycliff deliberately limits physical distribution while retaining a long-established premium identity, whereas La Flor Dominicana possesses broader physical presence and immense cultural recognition while remaining considerably smaller than some multinational competitors.

Graycliff and La Flor Dominicana expose different sides of the same problem: one restricts access as part of its identity, while the other shows that recognition can expand much faster than physical size. Boutique has always benefited from discovery, but discovery is a market experience, not a production method.

A company can become easier to find without surrendering founder involvement, tobacco discipline, or production authority. What changes may be the consumer's experience of scarcity or discovery. That does not necessarily end boutique; it shows that Market Perception and Access can move while other conditions remain.

Ubiquity may therefore matter more to market perception than to craftsmanship. Success is not contamination, and a company should not have to remain obscure to remain credible. But if access and discovery are part of what people mean by boutique, the industry needs some concept of when broad distribution begins changing the category.

Garzaroli solves the problem through deliberate restriction, while Gomez demonstrates why deliberate restriction cannot become a universal requirement. La Flor Dominicana’s influence became larger than its physical footprint because consumers responded strongly to the cigars and the people behind them. Punishing that recognition by declaring that success automatically destroyed the qualities responsible for it would make boutique a category that rewards obscurity.

That is where the question begins moving from classification toward marketing: once discovery becomes commercially valuable, the market acquires an incentive to manufacture its appearance.

ACT III — DOES THE LABEL ACTUALLY TELL US ANYTHING ABOUT QUALITY OR CRAFT?

CHAPTER 35
QUESTION 11 — IS BOUTIQUE ACTUALLY DIFFERENT FROM PREMIUM?

The premium cigar industry often talks about boutique as though the distinction is obvious: premium is one thing, and boutique is something more specialized. The problem is identifying what that additional word actually contributes. Premium already carries substantial meaning: a premium handmade cigar exists inside a category distinguished by tobacco, construction, fermentation, aging, blending, hand production, and a consumer expectation fundamentally different from cigarettes, machine-made cigars, or mass-market tobacco products. Once that is acknowledged, boutique has to do additional work.

Nicholas Melillo widens the lens enough to make the terminology almost absurd: "If you look at the broader tobacco industry, cigarettes, smokeless, and machine-made cigars, the entire premium handmade category is already boutique." His point is not that every premium cigar company should adopt the label, but that the entire handmade segment is already a niche when compared with the scale of the broader tobacco business. Context can make almost anything look small.

If it simply means handmade, premium already covers much of that territory; if it means quality, premium already makes that claim; if it means expensive, price has its own vocabulary; if it means limited, limited production can be measured directly; if it means independent, ownership can be examined directly; if it means small, production and distribution can be measured directly. Boutique therefore survives only if it communicates something premium does not. Michael Herklots approaches the distinction by refusing to treat boutique as a technical category: "'Boutique,' to me, is more of a mindset and an approach to business than it is a classification."

That sentence immediately separates boutique from premium. Premium describes a kind of product, whereas Herklots is describing an approach. The difference is important because a cigar can clearly belong to the premium handmade category without requiring anybody to know the size of the company, the personality of its founder, the factory arrangement, the distribution footprint, or how the people behind it think about themselves.

A premium cigar can come from a tiny workshop, a family company with generations of history, or a multinational organization. The category does not collapse merely because the ownership structure changes. Boutique behaves differently because the word attempts to communicate information beyond the cigar's basic product category, asking the consumer to notice something about the organization around the cigar.

Herklots has experienced that problem personally. Ferio Tego entered the market as a small new company carrying expectations normally attached to something more established, so the usual boutique storyline was difficult to apply. Boutique, under those conditions, becomes less a measurable status than an interpretation of how the business operates. **Billy Fakih, Co-Founder of Artesano Del Tobacco,** approaches the question through company identity: “The term boutique encapsulates the essence of our company.”

That is not a statement about whether El Pulpo qualifies as a premium cigar—its position in the premium handmade market already answers that. Fakih attaches boutique to the organization itself: "We have built this operation from the ground up, prioritizing craftsmanship over mass production."

He also connects boutique with originality, branding, new blends, and collaborations intended to produce something distinctive. Again, the cigar remains central, but the boutique claim extends beyond it to describe what the company wants consumers to understand about the people, priorities, and decisions surrounding the product. The contrast suggests a potentially useful division: premium describes what the cigar is, while boutique attempts to describe the environment in which the cigar was conceived, produced, presented, or

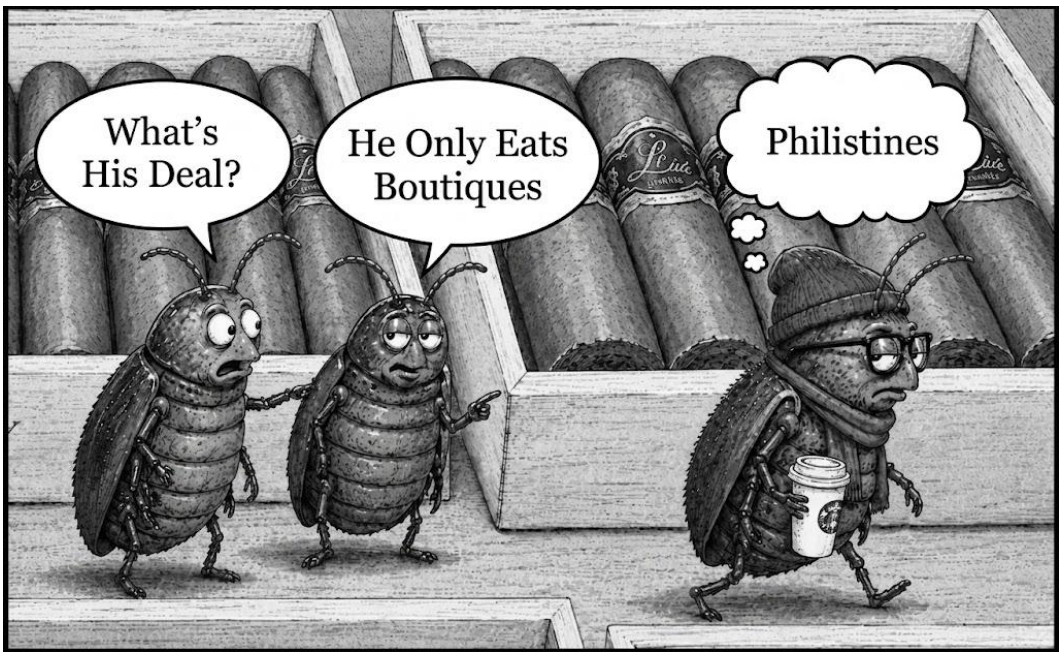
brought to market. That is not a perfect definition, but it is more useful than treating the words as synonyms. A premium cigar can be evaluated through recognizable physical and categorical characteristics, whereas boutique requires the observer to investigate something outside the cigar itself: Who made it? Who controls it? How large is the company? How broad is distribution? How involved is the founder? How unusual is the tobacco? How independent is the operation? How deliberately did the company choose its path?

Those questions are not necessary to determine whether a cigar belongs to the premium handmade segment; they become necessary only because boutique is trying to add another layer of meaning. The problem is that the industry has never agreed on which layer matters most.

Companies use boutique to signal different things: scale, independence, craft, personality, limited production, unusual tobacco, founder involvement, or simply distance from the industry's largest names. In practice, the word often behaves more like a modifier than a category, telling the consumer that something about a premium cigar should be understood as more personal, limited, unusual, or deliberately authored.

That expectation helps explain why boutique remains commercially useful even when it is analytically unstable. It adds discovery, personality, scarcity, or identity to the premium experience without reliably identifying which one.

A boutique cigar is not automatically more premium than another premium cigar. That sentence sounds ridiculous when stated plainly, but the market often behaves as though it were true. Once boutique becomes a superlative rather than a classification, the word begins implying that a smaller, more personal, or less institutional company somehow occupies a higher level of authenticity than the rest of the premium category. The evidence does not support that conclusion.



A large premium manufacturer can possess extraordinary tobacco, experienced blenders, disciplined fermentation, massive aging inventories, and decades of knowledge. A small company can possess almost none of those things. A small company can also produce extraordinary cigars through attention, flexibility, unusual tobacco access, and a willingness to pursue projects that would make little commercial sense for a much larger organization.

Those possibilities coexist. Premium and boutique therefore cannot be arranged as rungs on a ladder: premium is not below boutique, and boutique is not an upgraded version of premium. If boutique remains useful, its role must be descriptive rather than hierarchical. It should tell us something about the

circumstances surrounding a premium cigar that the word premium alone does not communicate. Herklots places that difference in mindset and business approach, while Fakih places it in company identity, craftsmanship, originality, and the way the organization was built. Neither man is simply describing the cigar as premium; they are describing the human and organizational environment around it. That may be the clearest distinction available: premium tells us which world the cigar belongs to, and boutique tells us how somebody wants us to understand its place inside that world. Whether the second description can be measured consistently remains the problem.

CHAPTER 36
QUESTION 12 — DOES SMALLNESS TELL US ANYTHING ABOUT QUALITY?

Small has become one of the most flattering words in modern consumer culture: small batch, small producer, small farm, small brewery, small distillery, small company. People hear small and immediately begin supplying the rest of the story themselves: personal, careful, authentic, craft-driven, better. Human beings have apparently decided that square footage is a moral category. Premium cigars are especially vulnerable to this assumption because the handmade nature of the product already encourages romantic thinking. The smaller the factory, the closer the founder, the fewer the cigars, the easier it becomes to imagine that every leaf receives some level of personal devotion unavailable inside a larger operation. Sometimes that is exactly what happens; sometimes it is not. **José Blanco, Worldwide Brand Ambassador for Arturo Fuente Cigars,** reaches backward through cigar history to make the distinction: “The old cigar makers never called themselves boutique.”

That observation removes the modern terminology and leaves the traditional cigar standards underneath it: tobacco knowledge, blending patience, reputation, process, time, family involvement, discipline. None of those values were invented when the word boutique became fashionable. Blanco's second line is even more useful: “The cigar always has to deliver.”

That is the standard smallness cannot escape. A small operation may have advantages: it may work with tiny tobacco lots that could never support national production, react quickly when something goes wrong, allow one person to remain involved in every important decision, experiment without needing a project to support millions of dollars in infrastructure, or cancel a cigar because the tobacco is wrong rather than force the project through because an annual plan demands another release. Those advantages are real, but they do not produce quality automatically. A small factory can ferment tobacco badly, a small company can release cigars too young, a founder can create an unbalanced blend, a limited production can be poorly constructed, a brand can lack the capital to hold tobacco long enough, or a tiny operation can substitute components because the original tobacco disappeared. The owner can personally supervise every mistake.

Skip Martin supplies the unpleasant reminder from the small-company side: “There are also dozens of small brands that do not consistently live up to the standard most people are speaking to.” That sentence should sit beside every romantic argument about scarcity or tiny production. Smallness creates possibilities; it does not issue a quality certificate.

Erik Espinosa maintains an operating standard that is far less interested in category: “I do things the right way, or I don’t do them at all.” Whether a company is small or large, that is the kind of claim the cigar can eventually test. It asks for execution rather than sympathy; proximity does not guarantee competence.

Law Ream pushes the same point to its logical limit. If boutique requires permanent small-scale limitations, the category starts rewarding weakness as though weakness were proof of craft. A classification associated with craftsmanship cannot require the absence of systems capable of improving the work.

Christian Eiroa reaches essentially the same conclusion without needing the boutique label at all. His vocabulary is older and more direct: “Everything matters.”

If everything matters, quality cannot be assigned to the size of the company; it has to emerge from the work itself: tobacco selection, fermentation, aging, blending, construction, the people performing the work, and the decisions made when something goes wrong. “Every step of the process is the most importantly part of the process.”

The wording is informal, but the principle is not. There is no stage in cigar production where quality suddenly appears. Quality accumulates through the process, and so do mistakes. Christian Eiroa is useful here precisely because he has little attachment to boutique as terminology while defending the standards people frequently associate with it. **Henderson Ventura, Founder of ADVentura Cigars,** provides the other half of the argument: “At ADVentura, being a boutique brand is not defined by size, but by intention, control, and a commitment to every detail.”

Ventura then makes that philosophy measurable through his own role: “As the founder, I also serve as the master blender, and I am present in the factory every day, directly involved in production.”

That is very different from simply saying the company is small. Ventura describes behaviors: presence, control, blending authority, attention to detail, respect for tobacco. He also emphasizes the time tobacco requires: “It means having real control over what we create, respecting the time required by the tobacco, and delivering an authentic experience in every cigar.”

Those conditions can affect quality, but the number of employees does not. Boutique language often bundles size and quality together. A company is small; therefore, it must be hands-on; it is hands-on; therefore, it must care more; it cares more; therefore, the cigar must be better. Each step feels reasonable, but none follows automatically from the one before it. A company can be small because the founders intentionally restrict production, because it is new, because it has limited financing, because demand never increased, because its tobacco supply physically limits output, or because the owners have no interest in growing. Those are completely different reasons for arriving at the same production number, and only some have any relationship with quality. The same mistake occurs with scarcity.

A cigar can be scarce because there were only a few bales of tobacco capable of producing it, which tells us something real about the product. A cigar can also be scarce because a company ordered two thousand boxes, printed Limited Edition on the packaging, and correctly predicted that consumers become anxious when somebody tells them an object may disappear. That tells us something real about marketing; the two should not be confused.

Small production can create opportunity for quality. A maker may use specialized tobacco that would be impossible in a larger line, a company may tolerate variation that a national brand cannot, or a blender may have greater freedom to build around one unusual component without worrying about supplying the same cigar for a decade. Smallness can also create quality problems. Tobacco inventory costs money, aging costs money, mistakes cost money, rejected production costs money, and holding multiple years of a component costs money. Consistency across agricultural variation requires both knowledge and inventory depth. A company with fewer resources may face harder choices when those pressures arrive. None of this diminishes the value of small manufacturers; it makes their accomplishments more impressive when they overcome those limitations. But admiration should follow the cigar.

Blanco's safeguard remains the cleanest: the cigar has to deliver. Ventura describes the work that can help it do so: control, intention, detail, time, presence. Those are practices, not synonyms for small. Separating practice from size also protects growing companies from the assumption that every added employee, inventory investment, distribution expansion, or quality-control system represents distance from the craft.

Growth can damage quality when the company outruns the tobacco, people, systems, or judgment supporting it. It can also improve quality by reducing the vulnerabilities of an under-resourced operation. The meaningful question is what changed: tobacco, aging, consistency, decision-making, founder involvement, commercial pressure, or the ability to reject a compromise.

Those are quality questions, but head count is not. Smallness can create intimacy, flexibility, experimentation, accountability, or fragility. The cigar still has to prove the rest. Small is a condition; quality is an achievement.

CHAPTER 37
QUESTION 13 — CAN SCALE AND INFRASTRUCTURE STRENGTHEN CRAFT?

The romantic boutique story usually has a villain: growth. At first the company is small, passionate, personal, and focused entirely on the cigar. Then success arrives. Production increases, distribution expands, employees appear, systems are built, warehouses fill, sales forces grow, and meetings multiply. The cigar, according to the story, never recovers. There are certainly companies that have grown into mediocrity, but there are also companies that remained small and achieved it without assistance. Scale is not the moral variable. Nicholas Melillo, Founder of Foundation Cigar Company, approaches the issue from the physical realities of tobacco: “Where ‘boutique’ becomes misleading is when it is tied to quality or consistency.”

That statement becomes more significant when he explains what consistency actually requires: “From a blending standpoint, consistency comes down to access: tobacco supply, aging, and inventory depth.”

Those are resources, and none of them is romantic. Premium cigar tobacco is agricultural inventory that may need to be purchased years before the consumer ever sees the finished cigar. The tobacco must be grown, harvested, cured, fermented, sorted, stored, aged, protected, and somehow predicted. A company blending a cigar today may need to think about what tobacco will be available several years from now if that cigar becomes successful.

The smaller the organization, the more difficult that problem can become. A small brand may find an extraordinary tobacco and build an exceptional cigar around it, which is one of the genuine creative advantages of small production. The same company may have enough of that tobacco for eighteen months. Then what? The blend changes, the cigar disappears, or another crop is substituted. The company purchases what is available rather than what is ideal.

That does not necessarily reflect poor judgment; it may simply reflect limited purchasing power and inventory depth. A larger or more established company can sometimes do something the romantic boutique story rarely credits: it can wait. Capital can buy time. A company with deeper resources can purchase enough of a tobacco to support years of production, hold inventory longer, or reserve tobacco from multiple crops. It can reject a shipment without immediately threatening the entire line. It can absorb the financial cost of aging tobacco rather than converting that inventory into revenue as quickly as possible. It can employ people whose entire responsibility is fermentation, quality control, agriculture, or blending. Those are not enemies of craftsmanship. They can be instruments of it. Infrastructure can protect patience, inventory can protect consistency, and capital can protect a blend from being altered merely because one component becomes difficult to acquire. Scale can give craftsmen more options, though none of that means they will use them well.

Tom Lazuka, Co-Founder of Asylum Cigars, describes infrastructure from the creative side rather than the defensive one: “It really gives us a lot of freedom to be creative and provide a first-class product at the same time.” That is the inversion boutique mythology often misses: more capability can create room to experiment rather than eliminate it.

Daniel Lance, Founder of Domain Cigars, describes the business consequence of formalizing production in equally unsentimental language: “Without that, a brand remains an idea. With it, a company becomes durable.” Durability requires more than a good blend. At scale, the company has to build enough operating structure for the idea to survive its own success.

David West, Founder of Avowed Cigar Company, supplies the necessary warning: “Production access and various sales/distribution channels may quickly become an anchor instead of a propeller.” Access creates temptation. A new company with strong factory relationships, distribution opportunities, retailer interest,

experienced founders, or easy production access can grow faster than an older boutique company ever could. That sounds like an advantage, but it is an advantage only if the company is prepared to carry what the advantage creates. More production requires capital, more accounts require inventory, and more distribution requires service. More markets require sales support, more tobacco commitments require forecasting, and more SKUs require attention. Every opportunity creates another obligation somewhere else in the system. West's warning is useful because it prevents the scale argument from becoming its own mythology. Infrastructure is not automatically strength; it can become weight. A company can have too many production opportunities or too many releases.

Scale magnifies capability and mistakes, and a company with poor judgment can waste either condition. The presence of infrastructure tells us what an organization is capable of doing; it does not tell us what it chooses to protect. That is the decisive question: what does the infrastructure serve? If the warehouse allows tobacco to age longer, the infrastructure serves the cigar. If deeper inventory protects a blend from unnecessary substitution, the infrastructure serves the cigar. If experienced quality-control personnel catch problems before they reach retailers, the infrastructure serves the cigar. If greater financial stability lets a company cancel a production rather than ship something it does not believe in, the infrastructure serves the cigar. If agricultural investment gives the blender more control over varieties, fermentation, and long-term supply, the infrastructure serves the cigar.

The relationship can reverse. Payroll, sales forces, distribution networks, retail programs, annual targets, and unused production capacity create demands of their own. At some point the machine can begin asking the cigar to serve it through easier-to-scale blends, broader tobacco specifications, or releases dictated by calendar rather than readiness.

That pressure is not unique to large organizations, but larger infrastructure can magnify it. Melillo shows what scale can protect: tobacco supply, aging, inventory, consistency. West shows what it can threaten: focus, patience, financial discipline, operational control. Resources expand choice; they do not make the choices.

A mature manufacturer can therefore remain extremely close to its cigars despite having more people, systems, tobacco, and layers. A founder may personally inspect tobacco because nobody else is available; a larger company may employ specialists with decades of experience whose only responsibility is protecting that standard. The more useful question is not which arrangement looks more boutique, but which produces better control.

Craft and infrastructure are not natural enemies. Limited resources can inspire creativity or expose fragility; repeatable systems can look less romantic while preserving consistency. The difference is what the machine has been built to serve. If infrastructure protects the cigar, scale can strengthen craft. If the cigar is changed primarily to protect the infrastructure, the relationship has reversed.

ACT IV — MAYBE BOUTIQUE ISN'T ABOUT SIZE AT ALL

CHAPTER 38
QUESTION 14 — DOES BOUTIQUE REQUIRE RISK?

Every new cigar company takes risks. Money is committed before demand is known, tobacco is purchased before the finished product has proven itself, retailers have to be convinced to make room, and consumers have to be persuaded to try something they may never have heard of. A bad production can hurt a small company more than it hurts one with twenty other lines capable of absorbing the damage. If that were all risk meant, however, every startup would automatically qualify as boutique. That cannot be the standard. The more interesting form of risk begins after a company has the opportunity to make safer decisions. Jonathan Drew places risk directly inside his understanding of boutique: "Boutique was never just about size… it remains tied to heart, attitude, innovation, risk, and how the market sees you."

Drew Estate is a useful company from which to hear that argument because risk is not theoretical in its history. The company did not build its identity by quietly imitating the established visual language, product presentation, or cultural posture of the premium cigar companies already surrounding it; it pushed against them. That does not mean every unconventional decision was automatically good. Innovation cannot become its own exemption from judgment. A cigar does not deserve praise simply because somebody had the courage to make it strange.

But meaningful innovation does require the possibility of rejection. A company that creates only what existing demand has already proven consumers will buy is taking one kind of business risk; a company willing to create something that may challenge the consumer is taking another. Boutique has often been associated with the second, which is where risk begins to separate itself from simple entrepreneurship. A distinctive blend can fail. An unusual package can alienate consumers, a strong brand voice can turn some people away, and a founder who refuses to imitate what is currently successful may discover that what is currently successful is successful for a reason. The safest cigar is often the one the market already understands. The more individual the point of view becomes, the greater the possibility that somebody will reject it. **Jeremy McDonald, Founder of Wildfire Cigars,** describes the same pressure from the market side: "Every retailer is asking the same thing: why should I carry your product? You need a real answer."

That question is especially brutal for a smaller company because the retailer is not granting abstract recognition; the retailer is giving up shelf space. A new cigar has to replace something, sit beside something, or justify inventory dollars that could have gone toward a product already known to move. The consumer makes a similar calculation: Why this cigar? Why this company? Why now? McDonald's answer is differentiation: "If your voice isn't distinct, you're just background noise."

That creates an uncomfortable requirement. The new company has to be different enough to be noticed without becoming different simply for the performance of being different. Novelty can attract attention, but it cannot sustain credibility. McDonald reduces the requirement to authenticity: "Authenticity is what cuts through. You have to live the brand."

That is where risk becomes cultural as well as commercial. A company that develops a recognizable identity is choosing to exclude something. A strong point of view cannot appeal equally to everybody because a point of view, by definition, has edges. The cigar may be too strong for some smokers, the branding may be too aggressive, the humor may not land, the story may not resonate, the tobacco may be unfamiliar, or the presentation may violate what a traditional retailer expects a premium cigar to look like.

A company can reduce those risks by moving toward consensus: make the blend less polarizing, make the packaging more conventional, broaden the flavor profile, avoid a strong position, and study what is selling to move toward the center. There is nothing inherently dishonest about doing that because businesses have to survive. But something changes when every decision is filtered through the question of what the largest number of consumers is least likely to reject.

The cigar becomes optimized. Boutique, at least in its strongest form, seems to require some willingness to resist that optimization. That does not mean ignoring consumers; it means leaving room for authorship. A blender may believe a particular tobacco belongs in the cigar even though it limits production, a founder may decide that a project should remain strange rather than become easier to sell, or a company may retain packaging that reflects its identity even when something more conventional would probably be simpler for the market.

Those are small decisions individually, but together they determine whether the market is shaping the company or the company is still willing to shape something for the market. Risk should not be confused with recklessness. Recklessness ignores consequences, whereas risk understands the consequences and accepts that a meaningful decision may still fail. A boutique company does not prove its legitimacy by losing money. Failure is not craftsmanship, nor is obscurity. There is nothing admirable about making a cigar nobody wants merely because the maker refused to compromise. The useful distinction is whether the company retains enough freedom to make a decision that is not already guaranteed by market consensus. That freedom becomes harder to preserve as obligations increase: more employees depend on the company, more retailers expect inventory, more distributors require support, larger tobacco commitments have to be financed, and the sales organization needs product to sell. Success creates constituencies, and every constituency adds another reason not to take a chance.

That does not mean large companies cannot innovate; Drew's argument rejects exactly that assumption. It means the consequences of innovation change. A small company may risk its survival, whereas a large company may risk a meaningful amount of money, retailer confidence, internal credibility, or the stability of an established brand. Both are risks; the scale differs.

Financial struggle should not be romanticized as a measure of authenticity. The cigar industry loves the mythology of the starving artist betting his last dollar on a wild, polarizing blend. The reality of modern manufacturing is that true creative risk is often a luxury of capital. A well-funded legacy brand has the infrastructure and financial padding to launch a weird, experimental, high-risk cigar; if it fails, the corporate balance sheet absorbs the blow. A genuinely small, undercapitalized independent brand might desperately want to push the envelope while survival dictates that it roll a safe, highly commercial Connecticut-wrapped cigar just to keep the lights on and pay the factory. Financial exposure does not make a company more boutique; it just makes it more stressed.

McDonald exposes the other side: new companies cannot rely on caution forever because caution turns them into background noise in a crowded market. The market therefore asks smaller companies to perform a difficult balancing act: be recognizable, do not become artificial, take chances, do not become reckless, create something different, make sure people actually want it, protect the identity, and pay the bills. There is no formula for that, and there probably should not be. But the tension reveals something useful about boutique. If boutique is merely a label applied after a company successfully follows existing trends, it tells us very little. If it carries any deeper meaning, part of that meaning may be the willingness to allow a cigar, a brand, or a company to reflect a distinct point of view before the market has guaranteed that the point of view will work. Boutique does not require failure; it may require the freedom to risk it.

CHAPTER 39
QUESTION 15 — IS BOUTIQUE A CULTURAL IDENTITY?

For much of this paper, boutique has been treated as a business problem: production, scale, ownership, distribution, factory relationships, infrastructure. Those things can be examined. Culture is harder: it cannot be counted in boxes, it does not appear on an ownership chart, and a factory tour will not necessarily reveal it. Consumers may recognize it before they understand anything about how the company actually operates. That makes culture dangerous as a classification, but it also makes it impossible to ignore. **Aric Bey, Founder of Black Star Line Cigars,** places culture near the center of his understanding of boutique: "Boutique lives in both, but if I had to choose, it starts with the voice, the vision, and the connection to the community."

That answer moves boutique away from the factory and toward authorship. Bey does not describe culture as decoration placed around the cigar after the blend is finished; it precedes the release. “Every release starts with a story, a purpose, and a cultural perspective that comes directly from me and our brand identity.”

The cigar becomes an extension of the company’s point of view. That does not mean the story excuses the cigar; nobody should have to smoke a mediocre product because the press release was emotionally compelling. But story can explain why a particular cigar exists, why it looks the way it does, why the company communicates the way it does, and why a particular group of consumers forms a connection around it. That connection is part of modern cigar culture.

Smokers do not encounter cigars only as isolated agricultural products. They encounter them in shops, lounges, events, podcasts, social media, factory trips, cigar clubs, dinner tables, and friendships. The cigar is still the object being smoked, but the experience around it can become inseparable from the reason the consumer remembers the brand. Bey’s perspective is particularly useful because his cultural identity is authored: it comes directly from his own experiences, interests, community, and worldview. That makes the founder an important part of the brand, though it does not make the founder the only possible source of cultural identity. **Hector Becerra, U.S. National Sales Director for Casa 1910,** expands the idea beyond the individual: “Casa 1910 is more than a cigar company. It is a celebration of Mexican history, culture, and craftsmanship.”

That expands the source of identity beyond the founder. The story reaches into place, history, tobacco, tradition, and national memory before Becerra narrows it back to the cigar itself: “Every cigar we produce tells a story about Mexico and the people who helped shape its history.”

That is a different kind of authorship. The identity is national and historical. Casa 1910 can use tobacco, names, presentation, imagery, and storytelling to connect the cigar to a cultural narrative larger than the founders themselves. The consumer is not only being asked to recognize the people behind the company; the consumer is being invited into a story about place, history, memory, and national identity.

Those elements have long existed in cigars. Cuba is more than a production origin in cigar culture, and so are Nicaragua, the Dominican Republic, and Honduras. Regions develop reputations, tobacco becomes connected to place, factories develop histories, and families develop histories. Consumers carry assumptions about all of them. The modern boutique market did not invent cultural identity; it became unusually good at making cultural identity visible. Becerra is not proving Casa 1910 is boutique simply by invoking Mexico.

A national story can become superficial marketing as easily as a founder story can. Flags can be printed, historical figures can be borrowed, and packaging can imitate authenticity without possessing much connection to the culture it references. Culture becomes meaningful only when it is actually integrated into what the company is trying to express. That is the same test Bey applies from a more personal direction: the identity has to come from somewhere real.

This produces two very different cultural models. Bey begins with community, whereas Becerra begins with history and place. One is centered on a contemporary voice; the other reaches into national memory. Both demonstrate why boutique can remain meaningful to consumers even when its structural definition becomes impossible to stabilize. People do not relate emotionally to production totals; they relate to stories. They recognize people, places, symbols, and communities, and they recognize whether a brand seems to speak with its own voice.

This does not make cultural identity a useful substitute for operational classification; in fact, it creates another opportunity for confusion. A brand can possess an extraordinarily strong cultural identity while operating through a large institutional platform, whereas another can be entirely independent and culturally anonymous. A tiny company can have no recognizable voice, and a large company can maintain a remarkably coherent one. Culture and structure do not move together automatically, which helps explain why consumers sometimes continue describing a company as boutique after the operational conditions beneath it have changed. The consumer may not be responding to the factory arrangement anymore; the consumer may be

responding to identity. That identity can survive growth, broader distribution, and sometimes changes in ownership.

Once consumers associate a company with particular people, stories, communities, places, humor, values, or rituals, the relationship does not disappear simply because the organization adds another warehouse. That emotional continuity can be powerful, but it can also conceal structural change. A brand can retain the language and imagery of its earlier identity long after the operating reality has moved elsewhere.

Cultural legitimacy and marketing performance begin to collide here. A culture can be lived, or it can be staged. The difference is not always obvious from outside. Bey's emphasis on voice, vision, and community provides one safeguard: if the identity originates with the people behind the brand and remains connected to an actual community, the culture has a source. Becerra provides another: if the cigar consistently participates in a larger historical and national story rather than borrowing that story only when convenient, the cultural identity has continuity.

Neither test is mathematical, but that does not make either meaningless. It simply means culture should be recognized for what it is: not an operational classification, not a quality guarantee, and not proof of independence. It is a relationship between the cigar, the people responsible for it, and the consumers who understand the story being told. That may actually explain more of boutique's survival than production numbers ever could.

The industry has spent years trying to define boutique by size while consumers have often been recognizing it through identity. That mismatch is one reason the arguments never end. The business asks what the company is; the consumer often asks who the company is. Those are different questions, and boutique has somehow been answering both.

CHAPTER 40
QUESTION 16 — DOES BOUTIQUE REQUIRE RESTRAINT?

Growth gets attention. New releases get attention. Collaborations get attention. Anniversaries get attention. Limited editions get attention. New sizes get attention. New wrappers get attention. New packaging gets attention. For a smaller cigar company trying to remain visible in an industry crowded with capable competitors, doing more can begin to feel like survival. **Mo Maali, Founder of Patina Cigars,** offers a useful objection: "You can't SKU your way to relevance."

That sentence is funny because the alternative would be depressing. It is also one of the sharpest observations in this entire discussion. A company can remain constantly active without becoming important. Another release can generate photographs, retailer announcements, event chatter, reviews, and a few weeks of conversation. Then the next release arrives, and then the next. Activity creates evidence of movement; it does not necessarily create direction. Mo Maali acknowledges the balance openly: "There is such a delicate balance between staying relevant and releasing too many cigars." That problem is particularly intense for smaller companies.

Andre Farkas identifies the restraint mechanism at the tobacco level: "Production is dictated by what the tobacco can genuinely support, not by projections or the need for consistency across volume." That is restraint before marketing ever enters the room. The available leaf gets a vote, and sometimes the answer is no.

Jonas Santana, President of Blackbird Cigars, makes the same demand at the company level: "A company that truly embraces a boutique mindset must be willing to control and protect its annual production levels to preserve its standards." The important verb is protect. Production becomes something that may need to be restrained in defense of the product.

A major established brand can remain visible through decades of consumer recognition, permanent shelf presence, large sales organizations, advertising, retailer programs, and an installed base of smokers who already know what the company represents. A smaller company does not possess that luxury. Silence can look like disappearance. The temptation is obvious: make something, announce something, collaborate with somebody, or create another line extension to give the market a reason to mention the company again.

Eventually, the portfolio can become a diary of anxiety. Restraint is harder because restraint produces fewer announcements, though it may also create a stronger identity. Maali's argument is not that companies should stop releasing cigars. A portfolio has to evolve. Tobacco creates opportunities, consumers want new experiences, retailers want reasons to engage their customers, and creative people generally want to create. The issue is purpose.

Why does the cigar exist? Does it add something? Does it express something the permanent portfolio cannot? Is there tobacco that genuinely justifies the project? Does the company have enough attention, capital, production capacity, and retailer support to manage another SKU properly? Or does the cigar exist because the calendar looked empty? Those are very different reasons for making something. The premium cigar industry makes restraint particularly difficult because scarcity itself sells.

A limited edition can create urgency, a collaboration can combine audiences, and a short production can generate the feeling of discovery. Consumers who hesitate may lose access. That pressure can be commercially effective, but it can also become exhausting. When everything is limited, limitation stops communicating much. When every release is special, special becomes inventory.

The same problem appears beyond products. A company can pursue every retailer, every state, every event, every media appearance, every collaboration, and every opportunity to be seen. That behavior may produce growth, but it can also dilute the very sense of focus boutique is supposed to represent. Ian Reith, Founder of Dapper Cigars, provides a useful counterpoint through market ambition: "If a brand doesn't have ambitions to be broadly recognized in the market, then sticking to its core fan base is probably just fine." That would have been a much harder strategy in an earlier cigar market, but modern communication changes the economics of niche survival: "With social media and the Internet, it's never been easier to do that."

A small brand can maintain direct relationships with consumers across geography without requiring the traditional path of expanding outward account by account until national recognition becomes necessary for survival. That creates a new form of restraint: a company can decide that everybody is not the customer.

Litto Gomez, Founder of La Flor Dominicana Cigars, has described restraint in almost the same language from a company that became highly visible without trying to become enormous: "We want to build up a brand name, and not our bank account." The line is useful because it separates reputation from maximum extraction. A company can want to become important without deciding that every available dollar has to be captured immediately.

That sounds obvious, but business culture routinely behaves as though admitting it constitutes some kind of failure. The obsession with growth encourages companies to treat every unserved consumer as lost opportunity. Every retailer not carrying the brand becomes white space, every geography becomes expansion territory, and every successful cigar becomes a candidate for another size, wrapper, variation, or sequel. The logic is understandable, but it is also endless.

Reith's answer suggests that modern boutique companies may have more freedom than earlier generations to reject that logic. A company can build deeply within a smaller community instead of broadly across every available market. It can maintain a core portfolio, know its retailers, stay close to consumers, and choose the opportunities that fit rather than treating every opportunity as evidence that growth must continue.

That is not necessarily a lack of ambition; it can be a definition of ambition. A founder may want to build the largest company possible, while another may want to build a company capable of remaining independent. Another may want a specific production level, and another may want enough scale to support employees,

maintain tobacco inventory, pay obligations, and continue making cigars without turning the operation into something unrecognizable.

Those are different goals. Boutique has often assumed that small companies remain small because they have not yet become large, but sometimes they remain smaller because they decided what enough looks like. That decision is harder than it sounds. Markets reward growth publicly; nobody issues press releases announcing that a company declined an unnecessary opportunity. There are no awards for the cigar that was never released because the tobacco was not ready.

Retailers never see the project a blender killed before production, and consumers do not know about the accounts a company chose not to open. Restraint produces invisible evidence. Yet some of the behaviors repeatedly associated with boutique require exactly that: waiting, rejecting tobacco, limiting production, maintaining aging, controlling distribution, refusing to chase every trend, keeping the portfolio coherent, and allowing the consumer to miss the company occasionally.

The last one may be the most radical. Modern marketing treats constant visibility as a requirement. Disappear from social media and the algorithm punishes you; stop announcing products and somebody else occupies the conversation. The pressure is structural. Jeremy McDonald, Founder of Wildfire Cigars, described that pressure earlier when he said that without engagement, a smaller company can become invisible. He was right, but Maali identifies the danger on the other side: visibility can become activity for its own sake.

The two ideas are not contradictory; they define the problem. A company has to remain present without becoming frantic, relevant without becoming repetitive, creative without becoming indiscriminate, and growing without allowing growth to decide every question. That is restraint. It also connects directly back to tobacco. Mel Shah reduces the patience argument to two sentences: “Cigars don’t benefit from speed. They benefit from time.” Tobacco has no interest in a content calendar; it does not ferment faster because the sales department needs something for the third quarter.

A scarce component cannot support unlimited production simply because consumers want more. The cigar imposes limits that marketing would prefer not to hear. A company willing to accept those limits behaves differently from one that treats every constraint as a problem to be engineered away. This does not mean smaller is better, as the earlier analysis already disposed of that assumption. Larger companies can exercise restraint, while small companies can flood the market. The question is behavioral: can the company say no?

Dr. Paul B.K. Garmirian, Founder of PG Cigars, built an entire operating history around that answer. His stated standard was simple: “Quality and integrity of the product and the service that you provide to your customers has to remain constant.” During the boom, that principle eventually produced a trade-show sign that said, “Sorry, we are unable to open new accounts.” The company had demand and chose to protect existing retailers instead of treating every new order as mandatory growth.

Saying no to another SKU, no to another account, no to another collaboration, no to releasing a cigar before it is ready, no to expanding a blend beyond what the available tobacco can support, and no to an opportunity that looks attractive but moves the company away from what it claims to be—that may be one of the strongest operational tests boutique has left. The test is not whether the company is unable to do more, but whether it is capable of doing more and sometimes chooses not to.

Maali’s earlier warning about trying to SKU a company into relevance gets to the heart of it. Eventually, the market notices the difference between a company building something and a company simply producing evidence that it is still busy. Boutique, if it retains any connection to intention, has to leave room for restraint. Otherwise, the word becomes another excuse to sell more things more often while pretending that abundance is somehow scarcity.

ACT V — WHAT HAPPENED TO THE WORD?

CHAPTER 41
QUESTION 17 — WHAT DOES THE BOUTIQUE LABEL ACTUALLY DO?

A label does not have to classify perfectly to be useful. That may explain boutique better than any definition considered so far. The word has survived despite disagreement over size, ownership, manufacturing, distribution, independence, quality, culture, growth, control, and almost every other characteristic attached to it. A completely useless term should eventually disappear, but boutique has not. So, it must be doing something. Casey Haugen, Vice President of CRUX Cigars, exposes the problem almost accidentally: “I would love for someone to tell me what boutique means...”

Then he asks the questions everybody eventually reaches: “Is it a number of cigars? The ambiance of the brand? Or just a mindset?”

Haugen is not struggling because he lacks familiarity with the cigar business; his experience is exactly what makes the uncertainty valuable. Once somebody starts trying to establish an actual boundary, the category becomes slippery. If boutique means small production, how small: ten thousand cigars, one hundred thousand, five hundred thousand, a million, or several million? If boutique means independence, does contract manufacturing disqualify the company? If boutique means hands-on, how much involvement is enough? If boutique means limited, what creates the limitation? If boutique means mindset, the measurement problem becomes even worse because mindset cannot be audited from a production report.

Yet the word remains immediately recognizable, which creates the core paradox: boutique may be weak as classification while remaining powerful as communication. The word creates an expectation before anyone establishes the underlying facts.

James Brown, Founder of Black Label Trading Company and Black Works Studio, explains why that expectation can become belonging: “When the brand isn’t for everyone, the people that do relate or understand it feel more exclusive and it creates this ‘boutique’ aura. People feel like they are a part of something.” That describes affiliation, not production. The label can help turn a product into a small social territory consumers feel they discovered and understand.

A consumer hears boutique and may expect something smaller, more personal, less corporate, more specialized, more difficult to find, more connected to the founder, more experimental, more independent, or possibly better. None of those characteristics is guaranteed, but the label points the consumer toward that general territory. That makes boutique less like a technical category and more like a signal.

Jon Huber, Co-Founder of Crowned Heads Cigars, describes one of the strongest human signals attached to the word: “More often than not, boutique applies to brands that usually have a front-of-house ‘face,’ so to speak, as opposed to corporations that rely on a boardroom of nameless suits whose objective is to generate revenue, regardless of the brand or product.” The contrast is intentionally sharp, but it identifies what many smokers are actually reacting to: a visible author rather than an invisible institution.

Erik Espinosa, President of Espinosa Premium Cigars, provides a particularly useful example because his own relationship with the term has never depended on finding a production number that settles the argument. Asked whether there really is such a thing as a boutique cigar company, Espinosa questioned the measurement immediately: “I don’t know what that means. Do you define it in the number of sales?”

He then pushed the problem further: “There you go, but how small? Is it a numbers thing?”

Those are the same difficulties Haugen identifies. But Espinosa’s next observation explains why the label can retain meaning even after the numerical definition collapses. For him, one of the expectations attached to boutique is personal involvement: “Absolutely. We built our business on social media and proximity. I take

calls from people that have been with us from day one. How can I turn my back on the people that got us to where we are?”

That answer moves the discussion somewhere production numbers cannot reach: proximity. Espinosa Cigars is no longer an unknown company fighting for its first accounts. Growth has changed the scale of the business, but growth has not necessarily erased the relationship consumers associate with the company. Espinosa still sees value in direct contact with people who supported the brand from the beginning, not because continued access is some grim duty imposed by success, but because being able to maintain those relationships is a privilege. The privilege itself says something important about what consumers may actually be responding to when they use boutique. They may not be measuring production at all; they may be measuring distance.

Mo Maali, Founder of Patina Cigars, makes that distance transactional in the best sense of the word: “Standing by your product with the people who spend their money on your cigars gives a face to the brand and establishes a connection.” The smoker sees somebody willing to stand beside the product after the sale.

How far is the smoker from the person whose name, personality, decisions, or reputation sits behind the cigar? Can the consumer meet that person, talk to him, send a message, see him at an event, ask about a blend, or feel that the person responsible for the product remains reachable after the company becomes successful? Those experiences can shape boutique perception far more strongly than a factory production report.

Sam Phillips, President of La Palina Cigars, adds a useful distinction between curiosity and attachment: “Most consumers are interested in who made the cigar. The most passionate consumers are interested in why the cigar exists in the first place.” That shift from who to why is where brand identity begins doing work that factory identification cannot do alone.

The industry frequently assumes that growth and proximity move in opposite directions. Sometimes they do. A founder who once handled every retailer relationship eventually needs employees, while a company that once answered every message may accumulate more consumers than any one person can reasonably know. Distribution expands, responsibilities multiply, and layers appear because organizations require them. That is normal growth.

But distance is not determined entirely by head count. A company can become larger while deliberately maintaining direct points of connection, whereas another can remain tiny while feeling completely inaccessible. Size and proximity overlap sometimes, but they are not the same measurement. Espinosa’s answer helps explain why consumers may continue calling a company boutique after someone examining only annual production decides that the label no longer fits.

The consumer may be measuring the relationship. That does not mean the consumer is analytically correct; it means the consumer is responding to something real that the usual classification debate has failed to isolate. Haugen shows us that the label lacks an agreed boundary, while Espinosa shows us why people keep using it anyway. It communicates a bundle of expectations, not guarantees.

Oscar Valladares, Founder of Oscar Valladares Tobacco & Co., puts it in his own terms: “Boutique identity has more to do with authenticity, closeness, and consistency in a brand’s philosophy than simply the number of boxes you produce.” His point helps explain why the label can survive after scale changes. Consumers may be measuring continuity and distance, not merely volume.

A label can influence what a consumer looks for before the consumer knows enough to verify it. Call something boutique and the smoker begins searching for intimacy, individuality, scarcity, authorship, or difference. Sometimes the company provides those things, sometimes the cigar provides some of them, and sometimes the marketing provides all of them before the operation provides any. That is where the label becomes commercially valuable.

Retailers can use boutique as shorthand for products outside the most familiar legacy brands, media can use it to organize a group of smaller or independent companies without explaining every ownership and production relationship each time, and consumers can use it to describe cigars that feel less institutional or more discoverable. Manufacturers can accept it because the word suggests characteristics they want associated with the company. The label therefore performs work even when it fails to classify with precision.

Billy Fakih, Co-Founder of Artesano Del Tobacco, treats visual identity as part of that work: “Our branding is crafted to be unique and original.” There is nothing trivial about that. Before a smoker knows the factory arrangement, tobacco inventory, or annual production, he sees the box and band. Boutique often reaches the consumer visually before it reaches him analytically, giving him an initial point of orientation.

Michael Szczepankiewicz, Co-Founder of Powstanie Cigars, supplies the necessary limit: “All of those things simply magnify who you are and what the company represents as a whole.” Visibility can amplify identity, but it cannot create a durable one from nothing. The label may point the consumer toward the brand, but eventually the company has to provide something worth magnifying.

Jeremy McDonald, Founder of Wildfire Cigars, states the modern pressure on a small brand with no romance at all: “If you’re not engaging with smokers and creating real connection, you’re invisible.” That helps explain why the label continues to matter. In a crowded humidor, communication is part of being found.

The label tells the consumer where to look. There may be something different here: the company may be smaller, the founder closer, the cigar unusual, the production limited, or the identity more personal. Investigate further. That is a useful market function, but it is not the same thing as a definition. Haugen cannot establish exactly where boutique begins, and Espinosa cannot provide a production number that settles it. The market continues using the word because perhaps that was never its most important function. Boutique does not necessarily tell the consumer what a company is; it tells the consumer what kind of company to imagine. And once that imagination carries commercial value, the next problem becomes unavoidable.

CHAPTER 42
QUESTION 18 — WHEN DOES BOUTIQUE BECOME MARKETING?

There is nothing inherently suspicious about marketing a cigar. A company that refuses to tell anybody what it makes will eventually discover one of capitalism’s less mysterious principles: people rarely buy products they do not know exist. Cigar companies advertise, hold events, tell stories, design packaging, work with retailers, use social media, seek reviews, launch new products, and explain why consumers should care. None of that corrupts a cigar. The relevant question is not whether boutique is used in marketing; the question is when the marketing value of the word becomes more important than whatever operating reality it is supposed to describe. **Oliver Nivaud, National Sales Manager for United Cigars,** identifies that separation clearly: “The market has matured to the point where consumers and retailers are looking deeper than labels.”

That alone suggests the label has lost some of the authority it once carried. Consumers know more, retailers know more, factory relationships are discussed more openly, production arrangements are easier to investigate, and brand owners communicate directly with smokers. A company can no longer assume that a single adjective will explain the operation. Yet Nivaud does not argue that boutique has become commercially useless: “The term still has marketing relevance, but it’s no longer a precise indicator of a company’s long-term viability.”

Those two ideas belong together. Boutique can remain valuable in marketing after it stops functioning reliably as classification. That is exactly why the word deserves scrutiny. If a label creates desirable expectations, companies have an incentive to use it. Boutique can suggest independence without proving ownership, scarcity without explaining what caused the scarcity, personal involvement without showing where that involvement occurs, unusual tobacco without identifying anything unusual, or craftsmanship without telling the consumer how the cigar differs operationally from another premium handmade cigar. The word does not

have to make a false statement; it can simply allow the audience to complete the sentence. That is efficient marketing.

Nivaud's broader diagnosis is even less flattering to the category: "The term alone has a major identity crisis and no longer clearly defines a company or production." Once the noun itself becomes unclear, the adjective can be moved almost anywhere a company finds it useful. That flexibility is excellent for marketing and terrible for classification.

Michael Szczepankiewicz approaches the problem through identity: "When I hear the word boutique it sounds to me like a brand that is trying to find their identity."

Boutique can become a substitute for saying what the company actually is. Instead of describing the identity directly, the label asks the consumer to supply one from familiar associations: small, independent, authentic, personal, craft, or different. Those are attractive ideas, but they are also easier to claim collectively through one word than to demonstrate individually. Szczepankiewicz offers a harder standard: "Authenticity and reputation. These are the two simple components that will establish a brand's identity."

Neither can be declared into existence. A new company can create branding immediately, packaging immediately, social-media accounts immediately, and visibility surprisingly quickly. Reputation takes longer because reputation requires a record. Did the cigars perform? Did the company support retailers? Did quality remain consistent? Did consumers come back? Did the company behave the same way after success arrived? Did the people behind the brand remain what they claimed to be? Time answers those questions. Marketing cannot answer them in advance. Szczepankiewicz makes the distinction explicit: "Authenticity and reputation are earned over time. They are not created because a company calls itself boutique."

Ernesto Pérez-Carrillo, Founder of Casa Carrillo, explains why the pressure to establish identity has accelerated: "Communication and brand marketing happen instantly now." Reputation still requires time, but introduction no longer does. A new brand can become visible before the market has accumulated enough experience to know what the visibility is worth.

That may be the cleanest point at which boutique crosses from description into positioning. A company describes itself when the language corresponds to observable characteristics; a company positions itself when the language is selected primarily because of what the audience is expected to infer. The same word can perform both functions. A small founder-led company may use boutique because it believes the term reasonably communicates its scale, independence, involvement, or specialized approach. That is not inherently deceptive. A retailer may use boutique because customers understand it as shorthand for unfamiliar or specialized products, which is practical language. A writer may use boutique because the industry lacks another broadly understood umbrella term. Imperfect language is not dishonest language. The problem begins when the suggestion becomes more valuable than the substance underneath it.

Steve Saka, Founder of Dunbarton Tobacco & Trust, is characteristically less diplomatic: "Anyone using this as a marketing pitch is missing the point: they should aspire to craft exceptional puros, provide professional account management and superior customer service." His objection is not to selling cigars; it is to allowing the descriptor to become a substitute for the things a cigar company is actually responsible for doing.

The temptation is easy to trace. A company knows consumers associate boutique with scarcity, so it creates scarcity as theater. A brand knows consumers associate boutique with personal involvement, so it builds a founder personality far larger than the founder's actual relationship with production. A company knows consumers associate boutique with small production, so it emphasizes one tiny release while allowing the audience to form conclusions about the entire organization. A cigar is called boutique because the word sounds more desirable than small, unknown, contract-produced, or difficult to find.

Andre Farkas, Founder of Viaje Cigars, describes the corporate version directly: "While larger conglomerates may co-opt the term by launching so-called 'boutique' lines within vast portfolios to suggest exclusivity, true boutique status demands a fundamentally different approach." Whether one accepts his final definition or not,

the marketing mechanism is clear: a company can borrow the emotional signal of smallness without becoming small.

Dion Giolito, Founder of Illusione Cigars, describes the elasticity from the other side: “But cigar companies have taken the word ‘boutique’ and worked it into an approach that fits a specific, targeted narrative within their operation, whether they are a multinational, billion-dollar company or a small business producing a relatively small amount of product and revenue.” At that point the word is no longer measuring one condition; it is being tailored to the story each company needs it to tell.

Nick Perdomo Jr., President of Perdomo Cigars, looks at that positioning from the retailer’s side, where failure has a cost: “They take up shelf space and if the brands don’t sell. They tie up cash flow from the retailer.” Boutique may sound romantic at the brand level; at the humidor level, every experiment occupies inventory somebody had to pay for.

Christian Eiroa, Founder of CLE Cigar Company and Eiroa, strips away another layer of marketing language: “The cigars have to earn their keep.”

There is not much romance in that sentence, which is why it belongs here. A cigar can arrive with a story, attractive packaging, a respected founder, limited production, and every other signal the market associates with boutique. Eventually the retailer has committed money and shelf space, the consumer has paid for the experience, and the product has to justify remaining there. Marketing can earn attention and create curiosity, helping secure the first order or the first light, but it cannot indefinitely protect a cigar that fails to earn its place.

Matt Booth, Founder of Room101 Cigars, in a Cigar TV discussion, reduced the market’s aesthetic shortcut to a phrase that requires no translation: “shit that looks different.” Crude, yes, but also useful. Packaging can become a visual proxy for boutique even when the actual production would never satisfy a more demanding definition.

Nothing has necessarily been lied about; the problem is unsupported suggestion. Marketing should present the strongest legitimate case for the product. Unsupported suggestion lets the audience infer qualities the company cannot demonstrate or does not want examined.

Identity still matters in a crowded market, but it should eventually become more specific than boutique. Who controls the cigar? What is different about the tobacco or process? What relationships are protected? What reputation has been earned? Boutique can introduce those questions, but it cannot answer them.

Lew Rothman, Founder and Former CEO of JR Cigars, has seen the same commercial migration before. His earlier observation about limited editions is the warning here: once a differentiation label proves commercially useful, the market can reproduce the signal faster than it can preserve the distinction. Scarcity language eventually becomes another form of abundance. A company begins small, the market calls it boutique, it grows, distribution expands, and production expands. As companies grow, language can lag behind operating reality. Sometimes that is innocent; sometimes it is commercially convenient. Marketing begins where the convenience becomes intentional.

The better standard is correspondence. If boutique implies smallness, explain the scale; if it implies independence, explain the ownership; if it implies hands-on involvement, show the involvement; if it implies limited production, explain what creates the limitation; if it implies unusual tobacco or process, identify what is unusual; and if it implies authenticity, allow time and behavior to prove it. Boutique becomes marketing when the word is used primarily for the attractive assumptions surrounding it. It becomes misleading when those assumptions no longer correspond reasonably to the company behind them. Marketing is not the problem; the problem begins when the label is doing more work than the company.

WHEN MYSTERY STARTS DOING THE WORK

Mystery has always had a place in premium cigars. Not every manufacturer wants to disclose every component, production relationship, tobacco source, or factory arrangement, and there can be perfectly legitimate reasons for keeping some of that information private.

The problem begins when mystery itself becomes part of the value proposition. The undisclosed factory becomes intrigue; the undisclosed blend becomes sophistication; limited information becomes evidence of exclusivity. Eventually, the absence of information is asked to do the same work that authorship, control, specialization, and tobacco knowledge were supposed to do.

That is another way boutique can drift from description into marketing. A cigar does not become more boutique because the company refuses to say where it was made or what went into it. Nor does a high price establish exclusivity, and a large production run does not become meaningfully limited simply because the word limited appears on the box.



There is something backwards about spending more time defending the price of a cigar or explaining why 10,000 boxes should still be considered “limited” than actually promoting the cigar itself. When the conversation becomes an argument over price, scarcity, terminology, and perception, the product has already been pushed into the background. The cigar should be the easiest part of the story to defend.

Secrecy may create curiosity, price may create prestige, and scarcity may create urgency, but none of those things proves meaningful production authority, independence, specialization, or restraint. Mystery can support an identity, but it should not be allowed to substitute for one.

CHAPTER 43
QUESTION 19 — WHAT DO SMOKERS GET WRONG ABOUT BOUTIQUE?

Smokers are not wrong to use shortcuts. Investigating every cigar company at the level required by this paper would turn an evening hobby into unpaid forensic accounting. People need shorthand, retailers need shorthand, and writers need shorthand. The problem begins when shorthand is mistaken for a complete set of facts.

That confusion did not originate with consumers. Manufacturers, retailers, distributors, media, and marketers have used boutique to describe different things while attaching the same favorable qualities to it. Consumers did not create the confusion. The industry handed them the word, loaded it with implications, and never agreed on what those implications proved.

Pete Johnson, Founder of Tatuaje Cigars, now sounds less certain about the category than the market often sounds on his behalf: “I don’t know what the definition is anymore.” Coming from somebody whose company helped shape the modern boutique conversation, that uncertainty is evidence in itself. Familiarity with the category has not produced a cleaner boundary.

Oscar Valladares addresses one of the resulting assumptions directly: “As long as the founder and the team maintain a real connection to the product and to the consumer, that essence can remain intact even as the company grows.”

That statement challenges the consumer who treats scale as a simple on-off switch where small equals boutique and large equals not boutique. Finished. The evidence throughout this paper has refused to cooperate with that tidy arrangement.

Growth changes a company, and it would be foolish to pretend otherwise. More cigars require more tobacco, more retailers require more service, more employees require more organization, and more markets require greater coordination. Systems appear because improvisation stops working. The founder who once knew every account personally eventually encounters the physical limitations of being one human being. Something changes. But consumers often make a second leap that does not necessarily follow: assuming that if the company became larger, everything they associated positively with its earlier stage must have disappeared. Valladares rejects that. Authenticity can survive growth, closeness can survive growth, a consistent philosophy can survive growth, and founder involvement can survive growth. The manner in which those characteristics are expressed may change, but scale does not automatically erase them. This is one reason consumers disagree so dramatically over mature companies.

One smoker looks at annual production and says the company obviously stopped being boutique years ago. Another interacts with the founder, knows the company’s history, recognizes its philosophy, follows the products closely, and insists that the company still feels boutique. They are measuring different things, and neither realizes the argument began before either of them opened his mouth.

Johnson also identifies one reason those measurements drift: “I think that Tatuaje as a brand, visually, people think it’s bigger than it really is.” Visibility, ratings, founder recognition, and cultural presence can make a company feel structurally larger than it is. Consumers often measure the footprint they see, not the operation behind it.

Nimish Desai, Industry Principal at Rocky Patel Premium Cigars, provides the historical complication. Asked whether Rocky Patel began as a boutique cigar company, his preserved answer is wonderfully unambiguous: “Hell yes, we were boutique. We were all boutique.” That line exposes another consumer shortcut.

Boutique and legacy are often treated as opposite categories: legacy is old, established, large, recognized, and permanent, while boutique is young, small, independent, discoverable, and emerging. That contrast works reasonably well if the consumer freezes the industry at one moment in time. Companies, unfortunately, insist on continuing to exist. Young companies age, unknown companies become known, small companies grow, founders build organizations, retail relationships accumulate, and factories expand. Consumers who discovered a brand before everyone else eventually have to endure the indignity of everyone else discovering it too. At some point, yesterday’s boutique company becomes today’s established company. Nothing magical happened; time passed. Desai’s answer makes that visible. The companies consumers now regard as established did not enter the market fully formed with national distribution, large inventories, experienced sales organizations, and decades of consumer recognition. They built those things. Many started with characteristics that a modern smoker would immediately associate with boutique: limited distribution, founder involvement, direct retailer relationships, smaller production, personal reputation, a fight for

recognition, and a dependence on word of mouth. If those companies had launched today under similar circumstances, the market would almost certainly place many of them inside the boutique conversation.

That suggests legacy may sometimes be less an opposite of boutique than a possible destination for companies that survive long enough. Not every boutique company becomes legacy, as most companies in any competitive business do not survive indefinitely. And not every established company began under identical conditions; history refuses to be that cooperative.

Lew Rothman, Founder and Former CEO of JR Cigars, locates part of the shift in the audience itself: “It changed because the consumer has changed.” Greater access to information did not merely educate cigar smokers; it expanded the number of things they expected to discover, compare, discuss, and distinguish from one another. His analogy is deliberately ordinary: “How many kinds of beer, potato chips, frozen dinners..... virtually anything you can name now occupy space on retail shelves today, why should cigars be any different?” The premium cigar market did not evolve in isolation. Consumers across categories became accustomed to choice, specialization, novelty, and constant differentiation. Boutique grew inside that larger appetite.

But treating boutique and legacy as fixed opposing species ignores the lifecycle of actual businesses. That is only one of the things smokers get wrong. Another is assuming boutique means better, though earlier sections already dismantled that idea: small production creates possibilities, but it does not create competence. Another mistake is assuming scarcity means intentional restraint: a cigar can be scarce because the tobacco limits production, or because somebody decided scarcity would help sell it. Another is assuming independence guarantees greater creative control: sometimes it does, but sometimes limited capital creates pressures a larger organization does not face. Another is assuming corporate involvement automatically eliminates personality: it can, but it can also provide infrastructure that allows a distinct brand to operate with greater resources. Another is assuming personal visibility means manufacturing authority: a founder can appear everywhere while controlling surprisingly little about the cigar, whereas a less visible operator may control everything from tobacco selection through final production.

The label encourages the consumer to bundle these characteristics: small, independent, hands-on, scarce, authentic, craft-driven, high quality, founder-led, and different. The industry has repeatedly shown that those characteristics can move independently, which creates the largest consumer misconception of all. The biggest thing smokers get wrong about boutique is not believing that boutique means small, independent, or limited—those are understandable interpretations. The larger mistake is assuming everybody else is using the word the same way.

One smoker says boutique and means production; another means ownership; another means discovery; another means founder personality; another means unusual tobacco; another means limited distribution; another means independent spirit; and another simply means something outside the large familiar brands occupying most of the humidor. The conversation functions perfectly well until somebody names a company, and then the hidden definitions collide.

One person insists the company is boutique, while another laughs at the idea. Both may possess accurate facts; they simply assigned different facts authority over the word. The boutique debate can become strangely emotional because people believe they are arguing over companies when they are often arguing over definitions they never stated. Valladares reminds us that the characteristics consumers value can survive growth. Desai reminds us that the companies now viewed as established once had beginnings too. Together they expose the danger of treating a company’s current market position as though it describes its entire history or philosophy. The smoker should not abandon the word boutique, because the word still communicates something. It creates curiosity, signals difference and can identify a general region of the premium cigar market worth exploring.

But it should create a question rather than provide an answer. Boutique according to what: size, ownership, control, production, culture, proximity, distribution, or history? Once that second question is asked, the conversation becomes much more useful. The label can influence the first sale; eventually the cigar has to

create the second. And after nineteen questions, the final one becomes unavoidable: if the industry can identify all of these characteristics individually, what happens when we stop asking which of them qualifies as boutique? What remains when the word itself is removed?

ACT VI — WHAT REMAINS WITHOUT THE WORD

CHAPTER 44
QUESTION 20 — WHAT REMAINS WHEN THE WORD BOUTIQUE IS REMOVED?

I should probably admit what I thought boutique meant before I started asking everybody else. I thought I had a pretty good idea. To me, a boutique cigar company was a relatively small operation, somewhere around a million cigars a year, give or take. That was never meant to be a scientific cutoff; it was more of a neighborhood. The company had enough production to be established, enough notoriety that serious cigar smokers knew the name, but it was nowhere near the scale of the industry's major manufacturers.

There was also something else attached to it that was harder to measure. The company had a following, not merely customers. People followed the releases, knew the blends, knew the owner or blender, and knew which factory made the cigars. They argued about the best sizes, waited for certain releases, and knew when something unusual was coming. There was a little cigar-nerd nirvana surrounding the brand.

The company had also entered what I thought of as the boutique vernacular. When knowledgeable cigar people talked about the great boutiques, certain names naturally came up. Nobody needed to stop the conversation and establish annual production, ownership structure, factory capacity, distribution footprint, and an organizational chart before allowing the word to be used. We seemed to know what we meant. Or at least I thought we did.

That was roughly the definition I carried into this project: small but established, independent, recognizable, respected, personally connected to its products and customers, large enough to have made an impact, but not large enough to feel institutional. Then I started asking questions. Funny enough, I am now less certain what boutique means than I was when I began. There is something mildly ridiculous about spending this much time studying a word only to become less confident about using it. Usually, research is supposed to narrow things down, but this one kept opening doors.

Every answer produced another qualification. Size mattered, except when it did not. Independence mattered, except when companies operating within larger organizations still behaved in ways people described as boutique. Owning the factory mattered to some people, while others pointed to brands producing excellent cigars through factories they did not own. Limited production mattered until somebody asked how limited. Founder involvement mattered until we encountered larger companies whose founders remained deeply involved. Craft mattered, but craft was hardly exclusive to small manufacturers. Scarcity mattered, except scarcity could be caused by rare tobacco, limited capacity, deliberate restraint, or somebody simply deciding to make fewer boxes.

At some point, the definition started resembling one of those arguments where everybody knows exactly what they mean until somebody asks them to explain it. I came out of this project more confident about what boutique is not than what it is. It is relatively easy for a company to say, "We are not boutique."

Pete Johnson, Founder of Tatuaje Cigars, can describe Tatuaje as a mid-sized independent company, and I understand immediately what he means. Mid-sized tells me something; independent tells me something. Put the two together and I have a reasonably useful description of the company without needing a committee meeting. I have become increasingly comfortable with that kind of language: mid-sized independent, small independent, founder-led, family-owned, vertically integrated, contract manufactured, nationally distributed, limited production.

Those descriptions have boundaries. They may still require explanation, but at least they identify the characteristic being discussed. Boutique usually requires a second question: boutique because of what? Size, independence, production, factory ownership, founder involvement, distribution, scarcity, packaging, culture, tobacco, personality? Because the owner answers his own telephone? Because the company has a devoted

following? Because it makes strange things nobody else would make? Because somebody called it boutique fifteen years ago and nobody ever bothered to ask whether the description still fit?

That is a lot of work for one adjective. I am probably with Pete at this point: mid-sized independent is easier to understand. There are fewer parameters to argue about, and nothing valuable has been surrendered. A company does not stop being creative because it stops calling itself boutique. It does not lose its independence, nor does it lose its relationships. It can still make small-batch cigars, experiment, protect particular tobaccos, know its retailers personally, maintain direct relationships with consumers, reject opportunities that do not make sense, and move quickly because decisions do not have to climb through five floors of corporate approval.

It can still possess virtually every characteristic somebody else associates with boutique. It simply no longer has to prove that those characteristics somehow add up to membership in a category nobody can define the same way twice. In retrospect, I probably should have picked an easier topic. I could have let whatever irritated me at the cigar show pass and gone on with my life like a sensible person. Instead, I decided I was going to figure out what everybody meant when they kept using this word.

That went well. Twenty questions, more than fifty industry voices, manufacturers large and small, companies that embraced the term, companies that rejected it, companies that outgrew it, companies that may never have fit it in the first place, and historical perspectives stretching back decades. After all of that, my definition became less certain, but something else became much clearer: the qualities underneath boutique are considerably easier to identify than boutique itself.

I stopped asking only what boutique meant and started asking what would happen if we removed the word completely. Not banned it, not declared it fraudulent, not demanded that every cigar company surrender its boutique credentials and report to whatever government agency would inevitably be created to administer such nonsense. Just remove it for a moment: what would actually disappear? Very little.

The tobacco would still be there. The cigar would still be there. The people making it would still be there. The retailer would still be there. The consumer would still be there. A company would still have a size whether anybody called it boutique or not. It would still have an ownership structure, and it would still manufacture its own cigars or have somebody else manufacture them. It would still have access to certain tobaccos and not others.

Some companies would still possess enormous inventories of aged tobacco, while others would work with much smaller inventories and particular lots. Some founders would still participate in nearly every decision, while others would lead organizations in which responsibilities were spread among dozens or hundreds of people. Some companies would still produce fifty thousand cigars, while others would produce five million. Some would still choose to stop at fifty thousand even if they could sell more.

Some would desperately want to make five million cigars and discover that wanting to make five million cigars and being capable of making five million good cigars are two very different things. Boutique does not alter any of that. The word describes; the company still has to operate. Johnson may have provided the simplest answer to this question without even being asked about boutique. When the Premium Cigar Association asked him what accounted for Tatuaje's long-term success, Johnson answered: “Good cigars. It has nothing to do with me.”

After everything we have examined, that answer is almost irritatingly simple, but there is much more behind those two words. Johnson immediately acknowledged that developing a blend is only the beginning. Other people have to reproduce it correctly, the proper tobacco has to remain available, production has to produce the same result repeatedly, and consistency has to survive long after the original excitement of creating the cigar is gone.

That is the part consumers rarely see. Someone has to find the tobacco, understand it, decide when it is ready, blend it, and teach other people how to reproduce that blend. Someone has to catch the cigar that is not right,

and somebody has to decide whether the tobacco available this year can reproduce what was made last year. Somebody eventually has to say no: no, this tobacco is not ready; no, this blend is not right; no, we cannot make as many as sales would like; no, we are not releasing this yet.

The band may change, the box may change, the marketing campaign may change, but the people doing the work still have to get the cigar right. I have spent enough time around this business to know how easy it is to fall in love with everything surrounding a cigar. I have done it. A great story makes the cigar more interesting; history makes it more interesting; knowing the person who blended it can make the experience more interesting; a beautiful band can make you want to pick up the cigar; a limited release can make you want it before somebody else gets it.

None of those things is imaginary. They are part of why premium cigars are more interesting than anonymous consumer products. But eventually somebody puts fire to the foot. Then the cigar gets its turn. Boutique cannot make the cigar burn correctly, improve mediocre tobacco, create balance where there is none, replace aging, rescue a blend that should have remained on the table, or make a bad cigar good because only five hundred boxes were produced. Eventually the cigar has to defend everybody who spoke on its behalf. James Brown, Founder of Black Label Trading Company and Black Works Studio, provided a fuller answer that helped me understand another part of what remains after the terminology disappears: “The branding becomes an extension of the person behind it. This authenticity cannot be faked. People see that from a mile away.”

I believe that. Authenticity is another one of those words cigar people throw around constantly, but Brown's point is less sentimental than it sounds. A company eventually develops a pattern. Consumers learn what it makes, how it behaves, whether every release feels like it came from the same creative voice, or whether the company simply follows whatever happens to be popular. They learn whether the story surrounding the cigar and the cigar itself belong together. Branding can amplify identity, but it cannot manufacture one indefinitely. The pattern remains whether the company is boutique or not. Andre Farkas, Founder of Viaje Cigars, gets even closer to the actual beginning of the cigar: “We begin with the tobacco itself, or simply with curiosity, with a particular leaf, a farm, or even a single bale that suggests possibility.”

There is something about that sentence I keep coming back to. It does not begin with a category, a sales projection, a price point, or a hole somebody identified in the portfolio. It begins with tobacco, or curiosity, or one bale that might become something. Farkas also described what happens when that possibility does not cooperate: the project can wait, or it can disappear.

One of the least visible forms of craftsmanship is restraint. We see what companies release; we do not see everything they rejected. The cigar that never reached the market leaves no evidence, nor does the blend that needed another year, nor does the tobacco somebody decided was not good enough. There is no Instagram photograph of the cigar a manufacturer wisely chose not to make. Restraint has terrible marketing.

Yet it may be one of the clearest indicators of whether the cigar or the business is driving the decision. A company can call itself boutique and release everything it thinks it can sell. Another company can reject the term completely and decide that the tobacco is not right, so there will be no cigar. Which one behaved more like the romantic idea people associate with boutique? That is exactly why the label stops helping: the behavior tells me more. Nicholas Melillo, Founder of Foundation Cigar Company, strips the issue down even further: “At the end of the day, ‘boutique’ doesn’t define how a cigar is made. What matters is tobacco, fermentation, aging, and the discipline to maintain a blend over time.”

One of the industry's more romantic assumptions deserves some pushback here: smaller is not automatically better. Smaller can mean more control, more flexibility, and closer involvement, but it can also mean less tobacco, less inventory, less capital, and less leverage with growers. It can mean less ability to hold five or ten years of a particular leaf. Those are not moral failures; they are operating realities.

Larger companies can face the opposite problem. Their infrastructure can become a machine that demands to be fed. Volume can begin making decisions that tobacco once made, sales expectations can pressure production, and a portfolio can become too large to protect every cigar equally. But scale can also provide

advantages: inventory can protect consistency, capital can buy patience, and long-term relationships can protect tobacco access. A large aging inventory can allow a company to maintain a blend instead of substituting another tobacco because the original leaf ran out.

Infrastructure can protect quality. The premium cigar industry sometimes treats inconvenience as evidence of authenticity. I am no longer convinced that is useful. There is nothing particularly noble about lacking the resources necessary to make the cigar correctly. The better question is what the company does with the resources it has. Does the infrastructure protect the cigar, or does the cigar eventually get changed to protect the infrastructure? That test tells me much more than boutique. Skip Martin, Co-Founder of RoMa Craft Tobac, brings the discussion back to the person who ultimately finances all of this: the smoker. “Instead of clinging to the term, we choose to focus on delivering value: good cigars at a fair price.”

There is an admirable absence of romance in that sentence. The consumer does not buy our classification system; he buys the cigar and spends the money. That creates a very simple relationship between promise and delivery: was the cigar worth what he paid? That does not mean inexpensive: a twenty-dollar cigar can represent excellent value, whereas a ten-dollar cigar can be a terrible value. Rare tobacco costs money, aging costs money, skilled labor costs money, small production can cost money, and packaging costs money. Running a cigar company apparently costs money every time somebody opens a door.

Fair price is not synonymous with cheap. Value means the experience justified the price. That judgment ultimately belongs to the smoker. The company can explain, the reviewer can score, the retailer can recommend, and the marketing department can perform whatever interpretive dance has been scheduled for that particular release. The smoker still gets the last vote, and he is perfectly capable of casting it without knowing whether we classified the manufacturer correctly.

Ernesto Pérez-Carrillo, Founder of Casa Carrillo, brings another element into the discussion that I do not want to lose when the boutique label is removed: reputation. Looking back at the earlier generation of smaller companies, Pérez-Carrillo said: “Brands had to build slowly, almost cigar by cigar, line by line, through reputation and personal recommendation. Word of mouth was all we had.”

The world he describes barely exists anymore. Information moves instantly, and a new company can introduce itself to thousands of smokers before the first shipment reaches every retailer. Social media, cigar media, podcasts, festivals, events, factory trips, and direct communication have completely changed how quickly a brand can become visible. But visibility and reputation are not the same thing. A company can acquire attention very quickly, but it cannot acquire history very quickly. It can announce a cigar instantly, but it cannot manufacture five years of consumer experience instantly. It can purchase advertising, but it cannot purchase the memory of a retailer who has reordered the product for ten years because customers keep asking for it. It cannot buy the accumulated confidence of smokers who have opened box after box and found the product consistent. It cannot speed up that part.

The first cigar matters, so does the fiftieth, and so does the cigar somebody buys years after the company is no longer new. Eventually reputation becomes the brand whether the company likes it or not. People remember whether the product delivered, retailers remember whether it sold, and they remember whether the manufacturer answered when there was a problem. They remember whether the fifth shipment resembled the first, and they remember whether promises were kept.

That is an old mechanism operating through new technology. Pérez-Carrillo’s cigar-by-cigar world became faster, but it did not disappear. Erik Espinosa adds another part of the equation that I do not want to lose when the label disappears: proximity. As he said earlier, he still takes calls from people who have been with the company since day one, and he treats those relationships as a privilege rather than a burden that success placed on him.

The people who support a company early take a chance on it before success makes the decision easy. They buy the cigars when the name is still being built, tell their friends, ask retailers to bring the product in, attend events, follow the company, and come back. Success naturally changes the relationship: there are more

retailers, more consumers, more employees, and more demands on everybody's time. Nobody should pretend that a founder can maintain exactly the same relationship with every smoker when the business becomes many times larger than it was at the beginning.

But distance does not have to become indifference. A company can become larger without forgetting who helped carry it there. That relationship is difficult to put on a production chart because it has nothing to do with annual volume, factory ownership, or vertical integration. It is memory: who was there when nobody knew the name? Who bought the cigar when the company needed somebody willing to take a chance? Who brought friends to the table? Who asked the retailer to give the brand a shot? Who showed up? Who came back?

That history belongs to the company too. If boutique has sometimes been used to describe closeness between the people behind a cigar and the people smoking it, Espinosa's experience demonstrates that growth does not automatically require that closeness to disappear. The word can disappear, but the relationship does not have to.

Then there is Steve Saka, Founder of Dunbarton Tobacco & Trust, who did not make life particularly easy for anyone hoping this project would end with a clean definition. His opinion of the word itself was established much earlier and does not need to be repeated here. But another part of his original answer becomes considerably more important at the end of the inquiry than it was at the beginning: “No brand should ever function as anything but being a great company and brand always regardless of legacy, size or some made up marketing moniker.”

There it is. Remove the moniker and nothing important disappears. Johnson leaves us with good cigars and the people, tobacco, and consistency required to reproduce them. Brown leaves us with authenticity that has to survive beyond the branding. Farkas leaves us with curiosity, tobacco, and the willingness to let a project die when the material does not justify it. Melillo leaves us with tobacco, fermentation, aging, and discipline. Martin leaves us with value. Pérez-Carrillo leaves us with reputation earned cigar by cigar. Espinosa leaves us with proximity, and with the idea that growth does not require a company to forget the people who helped carry it there. Success can increase the distance between a company and its consumers, but it does not have to erase the relationship. Saka leaves us with the responsibility to be a great company regardless of what anybody decides to call it.

That is a remarkable amount of agreement from people who cannot agree on boutique. And perhaps that is where this inquiry has been pointing all along. The disagreement should not be cleaned up for the convenience of my conclusion. These manufacturers do not share one definition: some believe boutique remains meaningful, some see it as mindset, some see craft, some see size, some see culture, some see independence, and some see direct involvement. Some believe a company can grow beyond boutique while continuing to make boutique-style products, while others believe the characteristics associated with boutique can survive almost any amount of growth. Some think the market has stretched the word so far that it is becoming useless.

Saka would probably prefer we stop bothering him with it altogether. The disagreement is real, but remove the word and something interesting happens: much of the disagreement disappears. Companies still have to choose tobacco, decide how to ferment it, decide how long to age it, and someone still has to blend the cigar, roll it, inspect it, and decide whether an imperfect project gets released or abandoned.

Companies still have to decide how much to produce, where to sell, how to price, how to support retailers, how to treat consumers, how quickly to grow, what compromises to accept, what opportunities to reject, whether every good idea needs to become another SKU, whether more is always better, and whether success means becoming larger or simply becoming better at what they already chose to do. Those are real decisions that create real differences between companies.

The industry does not need the word boutique to recognize those choices. Craft, control, intentionality, originality, patience, consistency, authorship, restraint, relationships, professionalism, reputation, value,

accountability, and quality remain visible without it. No production number guarantees them, no factory size eliminates them, and no label can substitute for them.

That does not make boutique meaningless. It survived because it has been trying to describe real qualities, but too many of them accumulated under one word. One person sees scale, another ethos, another the founder, factory, tobacco, or consumer relationship. They may all be describing something true while measuring different things.

Once those characteristics are separated, the conversation gets easier. Tell me the company is small, independent, vertically integrated, founder-led, broadly distributed, deliberately limited, tobacco-constrained, or built around a separate production protocol. Those descriptions can coexist because they do not pretend to be interchangeable. Tell me what actually happens.

A company can be small but not independent, independent but not vertically integrated, vertically integrated but enormous, large but founder-led, founder-led but broadly distributed, broadly distributed but extremely disciplined about production, limited without being small, small without being limited, or craft-driven without calling itself boutique.

That reality is what changed my own thinking. I began with a mental picture around a million cigars: independent, established but not big, recognizable, respected, and surrounded by a devoted following. I still recognize that company when I see it; I am simply less certain that recognizing it gives me authority to define everybody else. If Johnson tells me Tatuaje is a mid-sized independent cigar company, I may know more from that description than I would from boutique. Nothing important has been taken away from the company or its cigars.

The word can still serve as cultural shorthand, but serious analytical use requires the next sentence. If a retailer tells me a cigar is boutique, I want to know why. If a manufacturer calls itself boutique, what does that mean inside the operation? If a consumer describes a company as boutique, what characteristic is he responding to? Maybe it is the founder, the factory, scarcity, independence, the story, or the process. Maybe it is simply the wonderful feeling that he discovered the cigar before his friends did.

After listening to the people who build these companies, make the cigars, sell them, grow them, and live with the consequences, I am less interested in forcing consensus than in forcing precision.

Tell me what the company actually is, how it operates, who controls the cigar, what it protects when growth creates pressure, what it refuses to compromise, and whether the cigar delivers. Classification should follow those facts rather than substitute for them. With those facts separated, I can finally state the definition I am willing to use.

PART V
SYNTHESIS: WHAT THE MANUFACTURER RECORD ACTUALLY SHOWS

CHAPTER 45
SO, LET US DEFINE BOUTIQUE

After listening to all of these people, I suppose I could finally define boutique:

A boutique cigar company is a small company, unless size does not matter, producing limited quantities, unless volume is irrelevant, preferably making its own cigars, unless factory ownership has nothing to do with it, with direct control over tobacco, unless close collaboration with a manufacturer provides enough control, led by a visible founder, unless the brand is bigger than the founder, committed to craftsmanship, unless every handmade premium cigar already qualifies as craft, capable of growing without losing its identity, unless growth means it is no longer boutique, and possessing soul, ethos, authenticity, patience, discipline, community connection, independence, excellent tobacco, good customer service, and apparently no universally accepted method of proving any of it.

The definition sounds ridiculous because it is supposed to. The ridiculous part is not the manufacturers; almost every contradiction inside it comes from a position that makes considerable sense from the operating environment of the person giving it. Glen Case makes sense if boutique is a structural category. Matt Booth makes sense if it is human identity. James Brown makes sense if it is a production standard. Andre Farkas makes sense if it is intentional restraint. Michael Herklots makes sense if it is mindset. Nick Perdomo Jr. makes sense if it is maker responsibility. Sam Phillips makes sense if it is stewardship. Steve Saka makes sense if the entire category has become unnecessary. The absurdity comes from expecting one word to classify all of those realities simultaneously. The dispute is not only over the definition. It is also over the unit of measurement. Some people are measuring companies. Some are measuring cigars. Others are measuring behavior, size, process, ownership, proximity, identity, or what the consumer experiences.

The industry kept changing while the word did not. Companies grew, distribution widened, production relationships became more complicated, founders became brands, and brands survived founders. Small companies gained access to enormous factories, while large companies produced highly specialized projects. Consumers became participants in communities surrounding the cigars they purchased. Boutique kept being asked to absorb each development without becoming any more precise. Sooner or later, something had to give.

After all of that, I am still going to define it. Not because the industry reached consensus; it plainly did not. Not because I believe one definition can erase every contradiction in the record; it cannot. But after listening to the people who build, manufacture, sell, distribute, and live inside this business, working through twenty separate questions, and examining where their answers agreed, diverged, and occasionally collided head-on, I came away with a clearer idea of what the word can reasonably be asked to describe.

What follows is not an industry definition. It is not a standard anyone is required to accept, and it certainly is not gospel. It is my conclusion after following the evidence as far as I can take it.

I no longer believe boutique can be defended through one characteristic or one numerical threshold. The definition has to be layered because the evidence is layered. Pretending otherwise would be tidier, not more accurate. The recurring characteristics fall into four broad areas: the identity surrounding the cigar, the way the business operates, where meaningful production authority resides, and the relationship the company or product maintains with the market. None can carry the entire classification alone. In my opinion, boutique is:

At the company or brand level, boutique describes a premium-cigar enterprise in which four conditions remain materially present: a recognizable identity grounded in identifiable authorship, purpose, or specialization; an operating structure that preserves meaningful discretion over growth, releases, and decisions affecting the cigar; material authority and accountability over blend, tobacco, production, and release decisions; and a market relationship in which proximity, distinctiveness, selectivity, or discovery corresponds to something genuine about the enterprise rather than existing only as marketing.

No single proxy determines the classification. Size, production volume, ownership structure, factory arrangement, distribution breadth, founder visibility, scarcity, and legacy status can all influence the answer, sometimes substantially, but none settles it by itself. The relevant question is what those conditions have done to the company's identity, operating discretion, production authority, and relationship with the market.

Legacy status therefore neither qualifies nor disqualifies a company. Neither does growth. Outside ownership does not settle the question by itself, although it can place significant pressure on authority and operating discretion. What has to remain visible is meaningful human responsibility for why the cigar exists and sufficient authority to influence what is made, how it is made, when it is released, and what is protected when commercial pressure pushes in another direction.

At the cigar or production level, boutique can describe a specific cigar even when the parent company does not qualify at the company or brand level. But the project itself must demonstrate the same underlying characteristics: identifiable authorship or purpose, genuinely specialized intent, meaningful authority over tobacco and production, and a market identity consistent with the actual conditions under which the cigar was created. A limited quantity alone is not enough, and neither is attaching boutique language to an otherwise conventional production.

Boutique does not automatically travel from company to cigar or from cigar to company. The unit being classified has to be named first.

This is not a clean dictionary definition because the evidence would not support one. Size, volume, factory ownership, ownership structure, founder visibility, scarcity, and growth all mattered without settling the question by themselves. A large factory could make a highly specialized cigar while a tiny brand could sell something thoroughly conventional.

The word survived because those characteristics overlap often enough to remain recognizable and separate often enough to resist a simple rule. Finding a company that satisfies all four cleanly will not be easy. I am not the cigar police, and this is still America. If a company convincingly satisfies three of the four, it becomes difficult to argue that calling it boutique is unreasonable. Others may draw the line differently, and they are entitled to do so. The fourth characteristic still matters, but its absence should not automatically erase what the other three establish unless that absence fundamentally contradicts the classification.

I do not believe boutique became meaningless; it just became overloaded. My definition attempts to put boundaries around that overload without allowing one attractive characteristic to overpower everything else. A company does not become boutique merely because it is small. A cigar does not become boutique because it is difficult to find. A founder does not make a company boutique merely by remaining visible. A large factory does not automatically destroy specialization. A corporate ownership chart does not, by itself, tell us who is making the decisions that affect the cigar. None of those facts is sufficient without knowing what is happening around it.

What I keep returning to is identifiable authorship, operating discretion, production authority, specialization, proximity, and intention. Somebody has to remain close enough to the cigar to answer for it. The product has to possess some reason for existing beyond occupying another space in a portfolio. The people responsible for it have to retain enough authority to protect the cigar when growth, inventory, schedules, margins, or

organizational demands push in another direction. And the market has to encounter something genuinely distinct rather than merely being instructed to perceive it that way.

That does not mean every one of those characteristics has to appear in precisely the same form. A small founder-led company may express operating discretion differently from a mature family company. A contract manufacturer may exercise production authority through a different relationship than someone who owns a factory. A highly distributed company will experience proximity differently from one selling through a small number of retailers. The form can change; what cannot disappear is the underlying substance.

This keeps the definition from becoming a collection of automatic disqualifiers. Growth creates pressure, scale creates pressure, and broader distribution creates pressure. Outside ownership can create enormous pressure. So can increased inventory, larger payrolls, release calendars, retailer expectations, and the simple obligation to keep a larger organization moving. But pressure is not the same thing as outcome. The question is what the company does under that pressure and what survives after it.

Even then, reasonable people will disagree at the edges. That is preferable to certainty built on a production number somebody pulled out of the air. A useful definition should narrow the argument without pretending it can eliminate judgment.

The next question is therefore not whether every contributor would accept my definition word for word. They clearly would not. The next question is whether the evidence that produced it shows any recognizable pattern at all. Across the twenty questions, where did the manufacturers actually converge? Where did they divide? And where did they appear to disagree only because they were using the same word to measure entirely different things? That is where the argument goes next.

CHAPTER 46
THE MANUFACTURER AGREEMENT AND DIVISION MATRIX

The matrix below is not a vote. The twenty questions were not all yes-or-no propositions, and the contributor record should not be forced into artificial teams simply because a table prefers tidy columns. A name appears only where the testimony supplied a clear position relevant to the question. Silence is not disagreement, and no contributor is assigned a position because another answer makes that position seem likely. The table shows where the testimony converged, where another voice complicated the apparent agreement, and what survived after the disagreement was examined. The alliances move because the questions move; that movement is part of the evidence.

No single theory survives all twenty questions intact. Size collapses when quality, culture, or factory structure enters the discussion. Factory ownership becomes less decisive when collaborative authority and specialized production are considered. Independence loses some romance once capital, inventory, and infrastructure enter the picture. Founder identity becomes less useful once authorship can reside in a community, a country, or a brand larger than one personality. Scarcity separates from restraint, visibility separates from size, premium separates from boutique, and company separates from cigar. The repeated separation is the finding: boutique bundles characteristics that the actual industry allows to move independently.

Question	Primary Evidence	Counterweight / Complication	Finding
1. What is boutique supposed to measure?	James Brown; Andre Farkas; Sébastien Decoppet; Giselle Herrera; Jon Huber	Erik Espinosa; Casey Haugen; Steve Saka	Boutique most often points toward proximity to the work, but the industry does not agree on one unit of measurement.
2. Has boutique ever meant the same thing?	Lew Rothman; Dr. Paul B.K. Garmirian; Ernesto Pérez-Carrillo; Christian Eiroa; Dion Giolito; Mel Shah; Sébastien Decoppet	No strong evidence of a single original consensus	Historical meanings overlap without collapsing into one pristine original definition.
3. Who gets to decide what is boutique?	Skip Martin; Justin Andrews; Matt Booth; Jon Huber	Manufacturers, retailers, media, and consumers exercise different kinds of authority	No single actor controls the language.
4. Can size define boutique?	Glen Case; Jonas Santana; Daniel Lance	Abdel "AJ" Fernandez; Casey Haugen; Steve Saka	Size measures operating pressure, not a universal boundary.
5. Is boutique a stage or a business model?	Pete Johnson; Nick Perdomo Jr.; Michael Herklots	Jonathan Drew; Lee Marsh; Ian Reith	Boutique can operate as a stage structurally while persisting as identity or philosophy.
6. Are we classifying the company or the cigar?	Pete Johnson; René Castaneda; Tom Lazuka	The two units can diverge	Company and cigar must be analyzed separately.
7. Can the same factory make boutique and non-boutique cigars?	Terence Reilly; Abdel "AJ" Fernandez	Steve Saka; James Brown	Factory identity alone cannot classify the cigar; process, tobacco, authorship, and control are more informative.
8. Where does control actually live?	Justo Eiroa; Nick Perdomo Jr.; Sam Phillips	Ownership and authority do not always coincide	Meaningful authority and accountability must exist somewhere identifiable.
9. Does boutique require independence?	Law Ream; Rick Rodriguez; Erik Espinosa	Rick Rodriguez also identifies the advantages independence gives up	Independence changes the operating environment, but ownership alone does not establish or eliminate operating discretion.
10. Can something be boutique if it is everywhere?	Paolo Garzaroli; Litto Gomez	Broad availability can weaken discovery without changing the cigar	Distribution changes the consumer experience more clearly than it defines the company.
11. Is boutique different from premium?	Michael Herklots; Billy Fakih	Nicholas Melillo treats the entire premium handmade category as a niche	Premium describes the product category; boutique attempts to describe how a product or company exists inside it.
12. Does smallness tell us anything about quality?	José Blanco; Skip Martin; Law Ream; Erik Espinosa; Christian Eiroa; Henderson Ventura	Smallness creates advantages and vulnerabilities	Smallness is a condition. Quality is an achievement.
13. Can scale and infrastructure strengthen craft?	Nicholas Melillo; Justo Eiroa; Daniel Lance; Tom Lazuka; Rick Rodriguez	David West	Infrastructure strengthens craft when it serves the cigar; the relationship reverses when the cigar must serve the infrastructure.

14. Does boutique require risk?	Jonathan Drew; Jeremy McDonald	Risk by itself proves nothing	Boutique may require enough freedom to risk an unguaranteed idea, not a requirement to fail.
15. Is boutique a cultural identity?	Aric Bey; Hector Becerra	Culture can be genuine or staged and says little about operating structure	Culture explains attachment better than classification.
16. Does boutique require restraint?	Dr. Paul B.K. Garmirian; Andre Farkas; Jonas Santana; Mel Shah; Mo Maali; Ian Reith; Litto Gomez	Growth itself is not surrender	Restraint becomes meaningful when an available opportunity is refused to protect something the company values.
17. What does the boutique label actually do?	Casey Haugen; Erik Espinosa; Justin Andrews; Billy Fakih; Paolo Garzaroli; Mo Maali; Sam Phillips; Michael Szczepankiewicz; James Brown; Jon Huber; Jeremy McDonald	Signals do not guarantee operating conditions	Boutique is often stronger as communication than as classification.
18. When does boutique become marketing?	Oliver Nivaud; Michael Szczepankiewicz; Ernesto Pérez-Carrillo; Steve Saka; Andre Farkas; Dion Giolito; Nick Perdomo Jr.; Matt Booth; Christian Eiroa; Lew Rothman	Marketing itself is necessary	Boutique becomes marketing when the attractive assumptions surrounding the word become more important than correspondence with the company behind it.
19. What do smokers get wrong about boutique?	Oscar Valladares; Pete Johnson; Nimish Desai; Lew Rothman	Consumer shorthand is unavoidable	The largest error is bundling separate characteristics and assuming everyone is using the same definition.
20. What remains when the word is removed?	Pete Johnson; James Brown; Andre Farkas; Nicholas Melillo; Skip Martin; Ernesto Pérez-Carrillo; Erik Espinosa; Steve Saka	The contributors disagree more about the label than the underlying standards	The cigar, the work, the relationships, the standards, and the responsibility remain.

CHAPTER 47
THE COST OF IMPRECISION

Boutique survives because it still does useful work. Retailers can use it to organize discovery; consumers understand its general emotional territory; manufacturers can use it, reject it, or reshape it; and media can use it to signal a region of the market. The difficulty is that the word carries flattering associations without identifying which of them has actually been established.

Boutique can signal intimacy without proving proximity, authorship without proving production authority, craft without proving process discipline, independence without explaining who actually retains decision-making discretion, scarcity without proving restraint, culture without explaining operating structure, and founder accessibility without establishing who controls the cigar. Perception can also run in the opposite direction: a company can become culturally enormous while remaining smaller or more specialized than consumers assume.

The modifiers expose the fracture almost by themselves: small boutique, factory-owned boutique, boutique in spirit, boutique process, boutique-scale production, boutique identity, boutique mindset. Once a category routinely requires another word to explain which version is intended, the category has become an umbrella rather than a measuring instrument.

Precision therefore requires another question. If boutique means small, how small? If it means independent, independent in what sense: ownership, judgment, production authority, or operating discretion? If it means controlled, who controls what? If it means limited, what creates the limitation? If it means cultural, where does the identity come from? If it means restraint, what opportunity was actually refused? If it means authentic, what history of behavior supports the claim?

The definition I offered in Chapter 45 attempts to separate that overload into four areas that have to remain materially present: Identity, Operations, Production and Control, and Market Perception and Access. The purpose is not to turn those four areas into a score or to replace one automatic test with four new ones; it is to prevent one attractive characteristic from doing the work of the entire classification.

A company can be small and still lack meaningful production authority. It can own a factory and still make conventional decisions or operate inside a larger organization while preserving substantial discretion over the cigar. It can remain culturally intimate while its operations mature, while production authority can remain close even as distribution expands. Market perception can lag years behind operating change. A company can look boutique from the outside while behaving very differently inside or look institutional from the outside while retaining surprisingly direct authority over the product.

That is the cost of imprecision. If size is allowed to stand for the whole category, everything else disappears. If ownership is allowed to stand for it, authority and operating discretion disappear. If scarcity becomes the test, intention disappears. If founder visibility becomes the test, structure disappears. If market perception becomes the test, operating reality disappears. Each characteristic can tell us something; none is entitled to tell us everything.

The definition can identify the conditions I am willing to call boutique, but it cannot freeze a company in place. Businesses change, ownership changes, distribution changes, production relationships change, and founders become less involved or more involved. Infrastructure grows, and tobacco becomes available or disappears. Market perception moves at a different speed from operating reality.

That creates the next problem. If the definition identifies the conditions that matter, I still need a way to see what happens when those conditions begin pulling in different directions. This is where the Boutique Vortex comes in.

PART VI
THE BOUTIQUE VORTEX

CHAPTER 48
FROM DEFINITION TO PRESSURE

The Boutique Vortex grew out of a direct analytical need.

The definition I established in Chapter 45 is layered because the evidence is layered. It identifies four areas that have to remain materially present: Identity, Operations, Production and Control, and Market Perception and Access. But identifying those conditions does not tell us what happens to them as a company grows, changes ownership, expands distribution, builds infrastructure, alters production relationships, or becomes more visible in the market. A definition is static; companies are not.

I did not need another definition or a scoring system. I needed a way to see what happens when real-world pressures act on the four conditions. Growth can strengthen one area while weakening another; infrastructure can protect production discipline while creating institutional demands; wider distribution can improve access while changing discovery; ownership can change without immediately changing production authority.

Those movements were already present throughout the twenty questions. The Vortex did not create them; it gave me a way to organize them. The definition identifies the conditions I require. The Vortex shows how those conditions can reinforce, weaken, or separate under pressure.

CHAPTER 49
THE BOUTIQUE VORTEX

The Boutique Vortex is an interpretive model built around the same four areas identified in my definition: Identity, Operations, Production and Control, and Market Perception and Access. Each captures a different part of what the premium cigar industry routinely compresses into the single word boutique.

The model does not produce an automatic yes-or-no answer. A company may retain strong principal identity while its operations become more developed. It may preserve extraordinary production discipline while increasing output. It may become more widely distributed while remaining unusually close to retailers and consumers. Ownership may change while substantial decision-making authority remains close to the cigar. The reverse can happen as well: a company can remain privately owned while the cigar gradually becomes subordinate to inventory requirements, release schedules, financial pressures, or the demands of a larger operation. Those combinations are the reason the model exists.

HOW TO READ THE VORTEX

The Vortex is not a scoring system. None of the four areas receives a universal numerical weight, and there is no formula in which three strong categories can compensate automatically for a fourth that has largely disappeared.

When analyzing an enterprise, I begin by identifying what is being classified: the company or brand, or a particular cigar or production. Then I ask four questions, one for each area, which the sections below take up in detail:

- **Identity:** Does recognizable authorship, purpose, or point of view remain meaningfully attached to the company or cigar?

- **Operations:** Does the operating structure still allow the people responsible for the cigar to make cigar-first decisions when commercial or institutional pressures push in another direction?

- **Production and Control:** Where do meaningful authority and accountability over the cigar actually reside, including the ability to delay, change, or stop a project?

- **Market Perception and Access:** Does the market-facing identity correspond to something genuine about the enterprise or production rather than existing primarily as presentation?

The Vortex then looks for alignment and conflict. Has operational growth preserved production authority while changing access? Has ownership changed without substantially changing discretion? Has market perception preserved an earlier version of the company after the operating reality changed? Has recognition grown faster than the company itself? Has infrastructure given the maker more ability to protect the cigar, or has the cigar increasingly been asked to serve the infrastructure?

Conflicting pressures are the evidence the model is designed to expose.

The relationships are qualitative rather than statistical. The Vortex does not measure effect sizes, assign mathematical weights, or manufacture certainty where the evidence does not support it. It organizes judgment so that one attractive characteristic cannot quietly take control of the entire classification.

THE FOUR SYSTEMS

IDENTITY

Identity measures recognizable authorship and continuity: identifiable principals, personality, voice, culture, history, community, emotional familiarity, purpose, and a recognizable point of view.

Identity can survive changes in scale because stories and relationships have memory. Consumers do not automatically forget who founded a company because distribution expanded or infrastructure grew. A company may remain culturally intimate long after it stops being operationally small. That persistence can be genuine, but it can also become misleading.

Identity can outlive the operating conditions that originally gave it credibility. A founder may remain highly visible while exercising less authority. A company may preserve an outsider image after becoming institutionally substantial. A brand story may remain emotionally powerful even after production, ownership, distribution, or decision-making has changed. Identity therefore matters, but identity alone cannot settle boutique status.

OPERATIONS

Operations measures how the business functions: staffing, infrastructure, production capacity, distribution, logistics, administrative systems, inventory management, retailer support, market reach, ownership context, and decision-making autonomy.

Growth matters because growth creates obligations. More employees require payroll; more accounts require inventory; broader distribution requires support; larger production requires planning. A bigger organization needs systems simply to keep functioning.

None of that automatically destroys boutique characteristics. Operational maturity can improve consistency, protect tobacco inventories, support retailers, create financial patience, and give the people responsible for the cigar more room to make long-term decisions.

The harder question is what the operation eventually begins to serve. Does the infrastructure remain a tool used to protect the cigar, or does the cigar increasingly become something required to feed the infrastructure? The answer matters more than the mere existence of the infrastructure.

PRODUCTION AND CONTROL

Production and Control measures proximity to the work: tobacco knowledge, blend authority, factory relationships, fermentation, aging, manufacturing involvement, quality control, consistency, production decisions, and the ability to stop when the cigar is wrong.

Factory ownership can create extraordinary control, but it is not the only way to create it. A contract brand can possess meaningful authority through tobacco selection, blend development, close factory relationships, production oversight, and the ability to reject what does not meet its standard. Another company may own substantial manufacturing assets while the individual cigar exists largely because the operation requires another product.

The practical questions are more direct: who understands the tobacco, who developed the cigar, who approves the blend, who can refuse production, who decides whether the cigar is ready, who can say no when the tobacco does not support another run, and who is accountable when the finished cigar fails? Production authority is not the same thing as owning the building.

MARKET PERCEPTION AND ACCESS

Market Perception and Access measures how the company is experienced outside its own walls: recognition, availability, retail presence, scarcity, media attention, consumer discussion, events, ratings, discovery, reputation, proximity, and perceived size.

Perception can move much faster than operations. A small company can become culturally enormous because its reputation, personalities, media presence, or consumer following occupy far more space than the company itself. Another company can become operationally substantial while consumers continue to experience it as direct, personal, independent, or culturally boutique.

Access creates a similar complication. A cigar that becomes easier to find does not automatically become less carefully made. Broader distribution can reflect success rather than abandonment of craft. But if scarcity, intimacy, discovery, or proximity helped create the boutique identity in the first place, changes in access can alter how that identity functions in the market.

Market perception is therefore evidence, not operating reality. The tension between the two is one of the central reasons the Vortex is necessary.

CHAPTER 50
THE BOUTIQUE INTERACTION MAP

The Interaction Map asks one question: how can change in one of the four systems affect the others?

The map should be read across the four systems rather than as a chronological sequence. Each corner represents one system, and the directional lines represent possible influence rather than automatic causation.

Operations can alter access; access can alter perception; perception can reinforce identity; and strong production control can preserve product identity even while operations expand. A change in ownership can affect operating discretion and production authority, but the nature and degree of that effect have to be established rather than assumed.

A direct influence represents a relationship in which movement in one system can materially affect another. An indirect influence is mediated through another condition. A reinforcing influence occurs when one system strengthens something already present in another. A perceptual influence occurs when market interpretation changes even though the underlying operating condition may remain largely unchanged.

These relationships can also move in more than one direction. Greater production control may strengthen identity because consumers increasingly associate the cigar with a particular maker. Stronger identity may increase demand. Increased demand may expand operations. Larger operations may widen access. Wider access may change market perception. That change in perception may then alter the very identity that helped produce the growth in the first place. Nothing in that sequence is inevitable. That is exactly why the arrows represent relationships rather than predictions.

The Interaction Map shows why classification becomes difficult when the four systems do not move together or at the same speed. One observer may focus on operational scale; another may emphasize identifiable authorship; another may concentrate on production authority; another may respond primarily to market familiarity, accessibility, or scarcity. Each may be looking at real evidence. The disagreement begins when one type of evidence is allowed to stand for the whole company.

The Interaction Map shows how changes in one area can strengthen, weaken, or reshape another. It does not decide which system matters most: it makes the relationships visible.

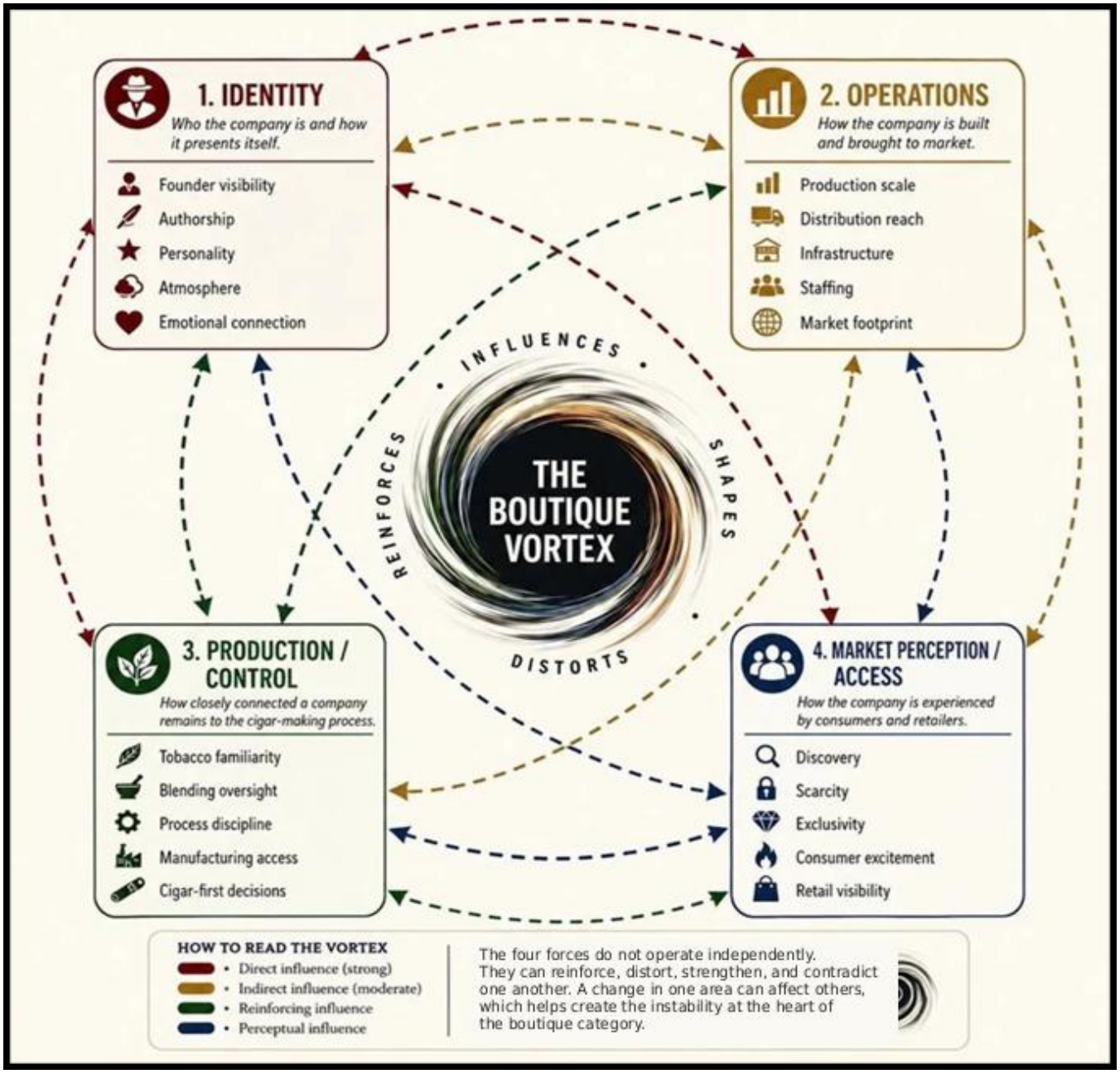


Figure 1. Boutique Interaction Map

CHAPTER 51
THE BOUTIQUE PRESSURE MAP

The Pressure Map looks at the same four systems, but it changes the question. The Interaction Map asks how the four systems can affect one another. The Pressure Map asks: what are the pressures acting on those systems actually doing to the conditions identified in the definition?

Pressure is not the same thing as outcome.

Growth can create pressure without destroying operating discretion. Outside ownership can create substantial pressure on authority without proving that authority disappeared. Broader distribution can change access and market perception without eliminating specialization. Greater infrastructure can create institutional demands while also giving a company more ability to protect tobacco, consistency, aging, production discipline, and retailer support.

The same ambiguity exists in the opposite direction. Scarcity can reflect discipline, limited tobacco, or deliberate restraint; it can also reflect limited demand. Founder visibility can signal real proximity and accountability; it can also become theater. Small scale can preserve flexibility; it can also reflect inadequate infrastructure or dependence on decisions made elsewhere. The presence of pressure therefore does not decide boutique status.

Direct pressure means that a condition bears immediately on one of the four systems. Secondary influence means the pressure first changes another system and reaches the definition indirectly. Pressure can strengthen a condition, weaken it, alter its form, or leave its underlying substance largely intact.

A company can become larger while retaining meaningful authorship. It can operate within a larger ownership structure while preserving unusual decision-making discretion. It can expand distribution while remaining specialized. It can maintain close production authority while its public identity becomes far larger than its physical operation.

The reverse can happen just as easily. A company may retain the appearance of intimacy after meaningful authority has migrated elsewhere. It may remain small while exercising little control over the cigar. It may promote scarcity while producing nothing particularly specialized. It may preserve a founder-centered public identity after the operating structure has become far less dependent on that founder.

The practical question is therefore not which pressure wins, but whether, after those pressures are examined, Identity, Operations, Production and Control, and Market Perception and Access remain materially present in the sense required by the definition.

The Interaction Map shows how the systems can affect one another. The Pressure Map shows what happens to those systems when growth, ownership, production relationships, infrastructure, access, visibility, scarcity, and market expectations begin pushing on them.

Together, the two maps allow the definition to remain stable without pretending the companies being examined are.



Figure 2. Boutique Pressure Map

WHERE THE VORTEX CAME FROM

The Vortex was not imposed on the manufacturer record after the fact. Its four systems and the relationships among them emerged from pressures that appeared repeatedly across the twenty questions. The terminology came later; the evidence did not.

Questions about size quickly became questions about operations. Questions about factory ownership became questions about authority. Questions about independence became questions about decision-making discretion. Questions about ubiquity became questions about access and perception. Questions about culture, founder involvement, restraint, risk, and marketing repeatedly returned to identity and the relationship between what a company was doing and what the market believed it was doing.

The Vortex organizes those recurring relationships. It does not claim that every question belongs exclusively to one system. Most of the useful evidence crossed systems, which is precisely why the Interaction Map became necessary.

The clearest points of origin are these:

Vortex relationship	Where it emerged most clearly in the manufacturer record
Identity ↔ Operations	Q5, Q9, Q15: company maturity, ownership change, growth, and the ability of identity to survive structural change
Identity ↔ Production and Control	Q8, Q14, Q16: authorship, authority, creative risk, restraint, and control over consequential product decisions
Identity ↔ Market Perception and Access	Q3, Q5, Q15, Q17, Q18: internal versus external identity, cultural attachment, discovery, narrative, proximity, and marketing
Operations ↔ Production and Control	Q4, Q9, Q13: scale, infrastructure, capital, ownership context, inventory obligations, consistency, and production pressure
Operations ↔ Market Perception and Access	Q5, Q10, Q16, Q17: growth, distribution, visibility, ubiquity, discovery, and changing consumer proximity
Production and Control ↔ Market Perception and Access	Q7, Q16, Q18: specialized production, tobacco-driven limitation, restraint, scarcity, and the market value attached to perceived craft

The same record also supplies the outward pressures represented in the Pressure Map. Identity can strengthen boutique perception while surviving changes elsewhere. Operations can create capability or institutional pressure. Production authority can protect specialization or become increasingly remote. Market perception and access can reflect genuine proximity and discovery or continue carrying an identity after the underlying conditions have changed.

Those relationships were already present before I gave them names. The Vortex simply puts them in the same room, which makes difficult companies easier to examine even when they do not become easier to classify.

CHAPTER 52
THE OUTLIERS: WHERE THE SYSTEMS STOP MOVING TOGETHER

These seven companies belong together because none fits comfortably inside a simple boutique narrative. Each brings several characteristics commonly associated with boutique into contact with characteristics that complicate that association. They are not exceptions to the analysis, and they were not selected as a validation sample for the Vortex. They are seven especially visible examples of what happens when Identity, Operations, Production and Control, and Market Perception and Access stop moving together.

These seven are illustrative, not exhaustive. Given enough scrutiny, almost any company in this record can reveal tension among scale, ownership, production authority, identity, access, and market perception. I selected these because their tensions were unusually easy to see. They are not uniquely abnormal; they simply make the classification problem more visible.

Chapter 45 makes that boundary explicit: no single characteristic automatically qualifies a company as boutique, and no single characteristic automatically eliminates it. The question is what scale, ownership, distribution, visibility, infrastructure, scarcity, founder identity, and factory relationships actually do to the four conditions the definition requires.

Padrón complicates scale and history. Drew Estate complicates growth, ownership, and identity. Ferio Tego complicates the assumption that a young company must also be unknown. Graycliff complicates scarcity, prestige, and controlled access. La Flor Dominicana complicates the relationship between reputation and operating footprint. Knuckle Sandwich complicates authorship and immediate visibility. Camacho complicates the relationship between historical identity, present structure, and present authority. None can be understood through one characteristic alone, which is precisely what makes them useful.

PADRÓN: BOUTIQUE VALUES BEFORE BOUTIQUE

Padrón predates much of the modern boutique vocabulary, yet many of the qualities later attached to the term are deeply embedded in the company: family continuity, tobacco discipline, production control, identifiable leadership, and a cigar-first operating philosophy. At the same time, its maturity, distribution, recognition, and position within the premium cigar market bear little resemblance to the obscurity or limited reach often associated with the traditional boutique story.

Jorge Padrón, President of Padrón Cigars, captured one side of that tension in a published interview when he said, “This is not a numbers company. This is a company that produces quality.” [16]

Under a simple size test, Padrón is difficult to defend as boutique. Under the definition used in this paper, size does not get to end the inquiry. Identity remains unusually coherent, Production and Control remain closely connected to the family and the tobacco, Operations are mature and substantial, and Market Perception and Access reflect a company with enormous recognition and a secure place near the center of the premium cigar industry. Those facts do not cancel one another: they create the case.

Padrón therefore asks whether operational maturity and market stature necessarily weaken boutique characteristics when identifiable authorship, production authority, specialization, and cigar-first discipline remain strongly present. It also creates a historical question underneath the structural one: did boutique create these values, or did the modern cigar market eventually attach the boutique label to values Padrón had already practiced for decades? Padrón does not need to be forced toward or away from boutique by scale alone. The more useful question is what its scale actually changed.

DREW ESTATE: WHEN IDENTITY SURVIVES STRUCTURAL CHANGE

Drew Estate creates a different tension. It began with outsider energy, founder identity, cultural disruption, unusual products, and a willingness to challenge assumptions about what a premium cigar company was supposed to look like. The company that emerged from those beginnings eventually became one of the most visible and operationally substantial organizations in the premium cigar industry.

Jonathan Drew does not describe boutique through one threshold. He identifies "production volume, distribution breadth, and brand identity" as three components of the category and adds that "the triangle can shift based on the priorities of the brand lifecycle and company values."

That shifting triangle describes the problem well. Production expanded, distribution broadened, infrastructure became institutional, and ownership changed. Identity did not move at exactly the same speed. Elements of

outsider culture, founder personality, creative risk, and market perception remained attached to Drew Estate long after the company's operating structure became far more developed.

The revised definition prevents any one of those facts from deciding the case automatically. Large scale does not settle it, outside ownership does not settle it, and founder identity does not settle it either. The harder inquiry is what remains materially present now. How much operating discretion survives inside the larger structure? Where does meaningful production authority reside? How much of the market-facing identity corresponds to present operating reality, and how much reflects cultural memory built during an earlier stage of the company?

Drew Estate therefore demonstrates why identity and structure have to be measured separately. A company can retain an extraordinarily powerful identity after its operating context changes. Whether that identity is still accompanied by the other conditions required by the definition is a separate question.

FERIO TEGO: WHEN CREDIBILITY ARRIVES BEFORE HISTORY

Ferio Tego challenges the traditional assumption that boutique discovery begins with anonymity. Structurally, it entered the market as a young founder-led company. Its founders, however, did not enter as unknown people learning the business in public. They arrived with industry experience, retailer relationships, professional reputations, media familiarity, and an audience that already knew who they were.

Michael Herklots described that mismatch directly, explaining that Ferio Tego was "in some cases viewed through a more established lens… despite operating with the realities and constraints of a small, founder-led company."

The important separation is between Operations and Market Perception and Access. The company could possess the operating realities of an emerging business while entering the market with recognition normally accumulated over years.

That does not make the company less authentic; it means obscurity and youth are not the same measurement. Ferio Tego therefore asks whether discovery is actually a necessary boutique condition or merely part of the mythology surrounding how boutique companies traditionally enter the market. The people can be known before the company is. Reputation can arrive before operating history. The market no longer requires every emerging company to begin invisible.

GRAYCLIFF: BOUTIQUE THROUGH PLACE, PRESTIGE, AND CONTROLLED ACCESS

Graycliff followed a developmental path that never fit neatly inside the usual outsider narrative. Its identity grew through the Bahamas, hospitality, luxury, place, history, and controlled access. Its limited footprint is not easily explained as the temporary condition of a young company still trying to obtain distribution.

Paolo Garzaroli describes the company in terms broader than production or retailer count, calling Graycliff "a curated experience, not just a product."

That description moves the analysis directly into Identity and Market Perception and Access. Graycliff was never built only around boxes occupying humidor space. Place, hospitality, memory, exclusivity, and controlled access became part of the experience surrounding the cigar. Its proximity to consumers developed through destination and experience rather than through the familiar sequence of small production, gradual retailer discovery, founder visibility, and later expansion.

That creates a different problem. Selectivity can be imposed by limited capital, lack of distribution, weak demand, or insufficient production. It can also be deliberate. Those are not the same operating facts even if the resulting cigar is equally difficult to find. Graycliff therefore tests whether controlled access can remain a meaningful boutique characteristic when it is an intentional part of the operating model rather than an obstacle the company has not yet overcome. Scarcity tells us that access is limited; it does not tell us why.

LA FLOR DOMINICANA: WHEN REPUTATION EXCEEDS FOOTPRINT

La Flor Dominicana exposes the difference between how large a company is and how large it feels. The company is vertically integrated, established, highly respected, widely recognized, and culturally prominent. Its founders and cigars occupy considerably more space in the premium cigar conversation than a simple production number would suggest. That visibility can make LFD appear structurally larger than it actually is.

Litto Gomez identified the imbalance himself when he observed that "our brand always had a bigger name than the actual size of our company."

That sentence is almost a direct description of separation between Operations and Market Perception and Access. Reputation and operating footprint are not the same measurement. Awards, retailer awareness, consumer loyalty, founder recognition, and decades of accumulated reputation can create a market presence far larger than annual production, staffing, infrastructure, or physical footprint would suggest. Under the revised definition, that reputation is neither a qualification nor a disqualification. The question is whether the market's perception corresponds to the underlying Identity, Operations, and Production and Control that remain present.

LFD therefore demonstrates how success itself can distort classification. A company can appear ubiquitous because nearly everyone in the premium cigar industry knows it without occupying the same operating scale as the industry's largest manufacturers. Recognition is real; scale is real: they simply are not the same fact.

KNUCKLE SANDWICH: WHEN VISIBILITY ARRIVES BEFORE DISCOVERY

Knuckle Sandwich reverses another traditional sequence. It did not spend years moving from obscurity to discovery to broader recognition. **Guy Fieri, Co-Founder of Knuckle Sandwich Cigars,** brought enormous public visibility into an existing partnership with Espinosa, allowing recognition to arrive almost immediately.

That creates an obvious reason for scrutiny. Celebrity visibility can produce attention without proving authorship, production authority, specialization, or meaningful involvement. Fieri confronted precisely that suspicion in the published record when he rejected the idea that the project should become “a brand-stamped celebrity thing.” [18]

But the reverse assumption is no safer. Immediate visibility does not prove superficiality any more than obscurity proves authenticity. The relevant questions belong to the other systems. Is there identifiable authorship and purpose behind the project? Who exercises meaningful authority over development and production? Is the cigar genuinely specialized, or is the identity doing all the work? Does the market-facing story correspond to the actual relationship among the people responsible for the product?

Knuckle Sandwich therefore demonstrates why Market Perception and Access cannot stand in for Identity or Production and Control. Visibility can arrive first. The rest still has to be examined. It also reinforces why the unit of classification matters. A celebrity-associated cigar, the brand carrying it, Espinosa as the operating partner, and Espinosa Cigars as a company are not automatically the same analytical unit.

CAMACHO: WHEN IDENTITY SURVIVES OWNERSHIP CHANGE

Camacho presents perhaps the clearest separation between historical Identity and present Operations. Its historical identity remains strongly connected to Honduras, Corojo tobacco, the Eiroa family, and the operating culture under which the brand established itself. Its present institutional setting is very different: Camacho now operates inside the much larger Davidoff organization.

Law Ream challenges the idea that operational maturity should automatically end the boutique discussion, arguing that "if ‘boutique’ demands small scale imperfection, then the term becomes self-defeating."

That objection is even more useful under the revised definition. Improved infrastructure, greater consistency, deeper resources, or institutional maturity do not automatically eliminate boutique characteristics, nor does outside ownership settle the classification by itself.

But ownership still matters because it can change the conditions underneath the identity. The relevant questions are no longer simply who owns Camacho or whether consumers still associate the brand with its history. The questions are what present ownership has done to operating discretion, where meaningful production authority now resides, how closely the current product remains connected to the identity consumers recognize, and whether the market-facing Camacho corresponds to the company and cigar that exist today. Historical identity did not disappear on the date ownership changed, but that does not mean the rest of the system remained unchanged either.

Camacho therefore illustrates one of the Vortex's most important ideas: the four systems can move on different schedules. Ownership can change in a day; identity usually does not.

WHAT THE OUTLIERS ESTABLISH

The outliers do not produce seven verdicts: that would defeat the reason they are here. They demonstrate what happens when the four systems separate. Padrón combines mature operations and enormous market stature with family continuity, production authority, and tobacco discipline. Drew Estate combines institutional development and changed ownership with an identity whose cultural force survived those changes. Ferio Tego entered with startup operations but established market credibility. Graycliff reached historical maturity while preserving deliberate selectivity and a highly specific experience. La Flor Dominicana developed a market reputation larger than its apparent operating footprint. Knuckle Sandwich entered with immediate visibility before the ordinary process of discovery could occur. Camacho carries a powerful historical identity inside a very different present institutional structure.

These are not seven versions of the same problem. They show why no single proxy deserves veto power. Size informs Operations; ownership informs operating context; factory relationships inform Production and Control; founder visibility informs Identity; scarcity and distribution inform Market Perception and Access. None tells us everything.

The revised definition requires all four areas to be examined. These seven cases are useful because their separations are unusually visible, not because they are the only companies in which they occur or because they validate the Vortex. The model came from pressures already present throughout the manufacturer record; these cases make them easier to see. The purpose is to make the source of disagreement visible.

THE LINE THE DEFINITION DRAWS

Refusing to issue seven verdicts does not mean the definition is incapable of excluding anything. It means difficult cases should not be forced into certainty the evidence cannot support. An analytical standard still has to be able to reject the easy claim.

A small company does not become boutique merely by purchasing limited production, attaching a founder-centered story, and restricting distribution. If the cigar was selected from production substantially designed by somebody else, consequential blend and tobacco decisions reside elsewhere, the company lacks meaningful authority to reject or delay production, and scarcity is being asked to substitute for authorship, the company may be small and the cigar may be difficult to obtain. Those facts do not satisfy the definition.

The same discipline works in the other direction. A large or mature company does not automatically disqualify every specialized cigar it produces if identifiable authorship, operating discretion, production authority, accountability, and genuine market distinction remain present in that particular production. The unit still has to be named, the evidence still has to be examined, and the four conditions still have to be materially present. Otherwise the definition is not a standard. It is hospitality.

PART VII
TESTING THE ARGUMENT

CHAPTER 53
COUNTERARGUMENTS

CONSUMERS DO NOT NEED A STRUCTURAL TEST

Most consumers buy cigars through flavor, trust, familiarity, price, reviews, availability, branding, and experience. Nothing in my definition requires a smoker to investigate ownership structures, production relationships, or decision-making authority before lighting a cigar.

The definition is an analytical tool for a word the industry repeatedly uses as though it carries more than casual meaning. On the humidor floor, boutique can remain useful shorthand. A retailer can use it to point a customer toward something smaller, less familiar, more specialized, or more personal without first conducting an organizational audit.

The standard changes when the discussion changes. If the question is simply what cigar somebody should try next, shorthand is enough. If the question is what kind of company, brand, or cigar actually deserves the classification, then the underlying conditions have to be examined.

BOUTIQUE WAS NEVER SUPPOSED TO BE A REGULATION

That is true, and I am not trying to turn it into one. Informal market language does not need regulatory precision to be useful. But once boutique begins implying authorship, specialization, personal authority, independence of judgment, scarcity, proximity, or distance from institutional decision-making, the word is already doing more than casual conversational work.

My definition does not reduce those ideas to a production cap, ownership test, or factory requirement. It asks whether the characteristics people associate with boutique correspond to something real in the Identity, Operations, Production and Control, and Market Perception and Access surrounding the company or cigar. That still leaves room for judgment, but it requires the judgment to answer to evidence.

CONTRACT MANUFACTURING MAKES AUTHORITY HARDER TO SEE

Contract manufacturing creates one of the strongest challenges to any serious boutique definition because factory ownership is visible while authority inside a production relationship often is not.

A company can own no factory and still originate its blends, exercise meaningful influence over tobacco, reject production, delay a release, insist on changes, and remain accountable for the finished cigar. Another can be small, privately owned, highly visible, and dependent on decisions made almost entirely somewhere else.

I therefore refuse to use factory ownership as a shortcut. The harder questions concern who developed the cigar, who understands the tobacco, who can change the blend, who can reject production, who decides whether another run should exist, and who answers when the cigar is wrong.

GROWTH DOES NOT AUTOMATICALLY END BOUTIQUE

Growth changes conditions; it does not answer the classification by itself. A company can add people, inventory, systems, distribution, production capacity, and infrastructure while preserving identifiable authorship, specialization, production authority, operating discretion, and meaningful relationships with retailers and consumers.

Growth does create pressure. More employees create obligations. More accounts require inventory. Wider distribution creates logistical demands. Larger infrastructure has to be supported. Success can gradually change what decisions are made, who makes them, and what the cigar is expected to do for the organization surrounding it.

But pressure is not outcome. The question is not whether a company grew, but what growth changed. Did it weaken authorship? Did production authority migrate? Did the company lose the ability to say no? Did inventory requirements begin determining releases? Did market access change the relationship with retailers and consumers? Or did greater scale give the people responsible for the cigar more resources to protect tobacco, consistency, aging, experimentation, and quality? Growth deserves examination, not veto power.

INDEPENDENCE IS MORE THAN OWNERSHIP

Independence remains one of the hardest ideas in this paper, but I no longer believe an ownership chart can settle it.

Outside ownership can create enormous pressure. Corporate platforms have financial expectations, portfolio requirements, administrative systems, inventory needs, reporting structures, release schedules, and institutional priorities that a smaller independent company may never encounter. Pretending those realities are irrelevant would be foolish.

It would be equally foolish to assume that the ownership transaction tells us everything that happened afterward. A larger organization may preserve substantial creative and production authority inside a brand. It may give the people responsible for a cigar resources, tobacco access, aging capacity, quality-control systems, and financial patience they did not possess before. Another ownership structure may gradually move consequential decisions away from the cigar and toward the needs of the institution.

The relevant form of independence is therefore not ownership alone; it is also independence of judgment. Who can still make the consequential decision? Who can reject a cigar, delay a release, protect a blend when a less expensive option is available, or refuse additional production when the tobacco does not support it? Who decides what the company will not do? Corporate ownership is evidence about the environment in which those decisions are made and can create powerful pressure against boutique conditions, but it does not, by itself, tell us the outcome.

THE VORTEX IS NOT FOR THE HUMIDOR FLOOR

The Vortex is deliberately more complicated than the word consumers use in ordinary conversation. It is not something a retailer is expected to explain before ringing up a box.

Its job is to expose why a simple label becomes unstable when Identity, Operations, Production and Control, and Market Perception and Access stop moving together.

The model earns its place only if it clarifies those conflicts. If it becomes another ceremonial diagram that manages to explain everything while deciding nothing, it has failed.

THE MAPS DO NOT CREATE A SCORE

The Interaction Map and Pressure Map are directional and interpretive. They do not assign points, universal weights, grades, or scientific effect sizes.

I rejected that approach because artificial precision would undermine the argument. The four systems have to be examined, but companies do not express them in identical ways. A founder-led startup, a mature family business, a contract brand, and a company operating within a larger ownership structure can preserve authorship, discretion, authority, and market proximity through very different arrangements.

The maps therefore show relationships and pressures; they do not perform arithmetic on judgment.

CHAPTER 54
SELF-AUDIT

WHAT I AM CLAIMING

The premium cigar industry does not possess one settled definition of boutique. The manufacturer record, retailers, media and community evidence, wholesale and distribution perspectives, market history, and difficult cases all support that conclusion.

I am also making a second claim now that the evidence is on the table: the absence of industry consensus does not prevent me from stating the definition I believe the record can support. My definition is the analytical conclusion of this paper, not a hidden consensus I claim to have discovered.

WHAT I AM NOT CLAIMING

I am not arguing that small companies are better, privately owned companies are automatically more authentic, large companies are compromised, or corporate platforms cannot protect craft.

I am not arguing that every cigar outside my boutique definition is mass-produced, inferior, anonymous, conventional, or unworthy of serious attention.

Boutique is a classification, not a quality award. A great cigar does not need the word, and a company does not become virtuous merely because somebody believes it qualifies for it.

LIMITS OF THE CONTRIBUTOR RECORD

The contributor pool is qualitative rather than statistical. Participants reflect different roles, relationships, eras, operating structures, company sizes, and market experiences. Some manufacturer source blocks survive as full direct Q&A, others as preserved exact excerpts, and a small number rely on clearly identified manuscript or published-source fallback material.

The retail inquiry began in South Florida because that was the market closest to me. It later widened to retailers in other parts of the country specifically to see whether the same concerns appeared outside the market where I began. That widened the geographic perspective, but it did not turn the retail group into a statistically representative national survey.

Its strength is breadth of qualitative testimony; its limitation is that the contributor pool is purposive rather than randomly sampled. That breadth also matters to the Vortex. Because the broader testimony is preserved, the model's provenance can be traced backward to specific questions and recurring relationships in the record rather than simply asserted after the fact.

The record is therefore strong enough to expose recurring patterns, disagreements, relationships, and pressure points. It is not a census of universal industry opinion and should not be represented as one.

LIMITS OF MY DEFINITION

My definition is intentionally layered, perhaps a little convoluted, which means some of its boundaries require judgment.

There is no universal numerical point at which growth becomes too much growth or visibility becomes too much visibility. Outside ownership can be clearly documented while the actual effect on decision-making discretion remains harder to observe. Principal involvement may be substantial without being public. Contract manufacturing can conceal the true balance of authority between brand and factory. Market perception may reflect current operating reality or an identity formed years earlier.

The four systems themselves are easier to identify than the exact point at which one has weakened enough to change the classification. That is a real limitation, but it does not persuade me to abandon the definition. It persuades me not to disguise judgment as arithmetic.

WHAT THE VORTEX CAN AND CANNOT DO

The Vortex does not replace the definition, and it does not decide who wins an argument.

It organizes evidence around four recurring systems so that an edge case can be examined without allowing one attractive characteristic to do the work of all the others.

The strongest challenge to my approach is that reasonable people can examine the same evidence and disagree over whether Identity, Operations, Production and Control, or Market Perception and Access remain materially present in the sense required by the definition.

I accept that judgment cannot be removed from this category. What can be removed is the pretense that size, scarcity, founder visibility, ownership, factory arrangement, distribution, or any other single characteristic settles it.

THE BOUNDARIES OF ANALYTICAL AUTHORITY

This paper does not seek to regulate trade language or issue compliance certificates at industry trade shows. Market participants will continue to use positioning language that serves their commercial interests.

The analytical task is different: it asks whether market claims correspond to operating facts. Some of the strongest evidence for looking past the label came from founders themselves. Pete Johnson of Tatuaje and Glen Case of Kristoff both acknowledged that their companies had outgrown the boutique classification. Operating realities change even when cultural narratives lag behind, and the people closest to those companies were willing to say so.

Companies remain free to use whatever terminology suits their market strategy. My concern is what the operating evidence actually supports.

CHAPTER 55
FINAL FINDINGS

After more than one hundred pages of competing definitions, conflicting standards, and industry testimony, the argument has reached its conclusion. The evidence did not produce consensus. It produced something more useful: enough clarity to distinguish between what the industry calls boutique and what can reasonably be defended as boutique.

The cigar industry has used the word with such casual breadth that almost every premium cigar company can qualify under one interpretation and fail under another. Under the market's competing definitions, nearly everyone is boutique and nobody is boutique. The problem is not that the word means nothing; it means too many things at once. The definition developed in this study narrows that field by requiring four areas to remain materially present together: **Identity, Operations, Production and Control, and Market Perception and Access**.

In practical terms, that means recognizable authorship or purpose, meaningful operating discretion, production authority and accountability, and a market-facing identity that corresponds to something real. No single characteristic is enough, and no single proxy automatically decides the question.

THE LESSONS OF THE RECORD

Several findings survived every attempt to simplify the problem. Boutique never achieved one universally accepted industry definition. That does not mean the word is empty; it means the premium cigar industry has repeatedly asked the same word to carry different kinds of information depending on who is using it.

- **Manufacturers** tended to approach boutique through scale, authorship, tobacco discipline, operating structure, and production authority.
- **Retailers** approached it through shelf space, inventory movement, hand-selling, differentiation, and repeat sales.
- **Media and Community Voices** more often emphasized story, visibility, founder accessibility, cultural identity, discovery, and participation.
- **Wholesale and Distribution** brought another set of realities altogether: volume, logistics, margin structure, sales support, movement, and reorder durability.

They were not necessarily disagreeing about the facts; often they were simply looking at different facts. That is one reason boutique became overloaded. We have asked one adjective to carry size, ownership, independence, authorship, production authority, craft, scarcity, proximity, market access, culture, authenticity, principal involvement, specialization, restraint, discovery, and even assumptions about quality. No word can carry that much weight without eventually breaking down and requiring an explanation.

The evidence also rejected most of the shortcuts that have been used to manufacture tidy definitions:

1. **Smallness** can create conditions commonly associated with boutique without guaranteeing craft, authority, specialization, or quality.
2. **Scale** creates pressure without automatically destroying any of those virtues.
3. **Factory Ownership** and **Production Authority** are related, but they are not identical.
4. **Outside Ownership** can materially change the operating environment without telling us, by itself, what authority survived inside the factory.

5. **Scarcity** can result from discipline, tobacco limitations, strategy, limited capacity, weak demand, or clever marketing.
6. **Recognition** can make a relatively modest company appear structurally enormous, while **Identity** can survive structural change long after operations mature.
7. **Market Perception** can move at a completely different speed from operating reality.

The people most skeptical of boutique also frequently defended many of the exact same underlying standards as those who still embrace the term: tobacco knowledge, discipline, patience, accountability, identifiable authorship, meaningful authority, restraint, relationships, and a cigar worthy of the claims made around it. The disagreement over the word is often far greater than the disagreement over the qualities people actually value.

THE FOUR CONDITIONS REVISITED

I am therefore not willing to conclude that boutique became meaningless. My definition is an attempt to separate the characteristics that ordinary market use compressed together, not to pretend the industry secretly agreed on a definition all along. The definition I have offered is mine, but it is not arbitrary. It grew out of recurring conditions that surfaced throughout the twenty questions and eventually organized themselves into four core areas. At the company or brand level, I believe all four have to remain materially present:

- **Identity** requires something recognizably authored, purposeful, specialized, or culturally coherent. There has to be an identifiable reason the company and its cigars exist in the form they do.
- **Operations** requires enough meaningful discretion that consequential decisions can still be made in service of the cigar rather than simply in service of the corporate structure surrounding it. Size, staffing, infrastructure, distribution, ownership, and administrative complexity influence that discretion, but none determines it automatically.
- **Production and Control** requires identifiable authority and accountability over what is made, how it is made, and whether it should be made at all. Ownership of a factory may strengthen that authority, but the real questions concern tobacco, blending, production decisions, quality, restraint, and who possesses the power to stop the process when the cigar is wrong.
- **Market Perception and Access** requires some genuine relationship among the company, the cigar, retailers, consumers, discovery, proximity, selectivity, distinctiveness, and the identity the market experiences. That market-facing identity has to correspond to something real: presentation alone cannot create the operating conditions it claims to represent.

No single characteristic is enough, and no single characteristic should automatically end the inquiry. A small company can fail the definition; a growing company can satisfy it. A privately owned company can surrender meaningful discretion, whereas a company operating inside a larger corporate structure can retain far more authority than outsiders assume. A cigar produced in a large factory can be highly specialized, while a cigar made for a tiny brand can be thoroughly conventional. A famous company can remain unusually close to its products and retailers, while an obscure company can exercise very little meaningful control at all.

The question is not what one isolated fact appears to prove, but what happened across all four systems simultaneously.

PRESSURE, OUTCOME, AND THE VORTEX

Pressure therefore became central to this analysis. Growth, scale, ownership, infrastructure, distribution, inventory, visibility, and market expectations all create pressure, but none of those pressures is automatically an outcome. What matters is what survives them.

Separating pressure from outcome changed the way I understood boutique. The industry has often treated certain characteristics as though they survive untouched until some invisible threshold is crossed and then disappear all at once. The evidence does not behave that way. Identity, operating discretion, production authority, and market perception can change at different speeds. One can strengthen while another weakens; one can remain largely intact while another has changed dramatically.

The Boutique Vortex exists to make those separations visible. It does not determine boutique status, and it does not assign arbitrary points. It organizes Identity, Operations, Production and Control, and Market Perception and Access, shows how they affect one another, and exposes the pressures that can strengthen, weaken, or separate them.

It also explains why reasonable people can look at the exact same company, agree completely about its size, ownership, production structure, history, distribution, and reputation, and still disagree about boutique. One person may give enormous significance to scale; another may concentrate on production authority; another may focus on continuing founder identity; another may care only about proximity or market access. The definition keeps any one of those observations from deciding the case by requiring all four systems to be examined.

The company and the cigar must remain separate units of analysis. Boutique does not automatically travel from company to cigar or from cigar to company. A company or brand may fail to satisfy the definition as a whole while a particular production still demonstrates identifiable authorship, specialized intent, meaningful production authority, operating discretion at the project level, and a market identity consistent with the conditions under which the cigar was created.

The reverse can also be true: a company may possess strong boutique characteristics without every cigar it produces automatically inheriting them. A limited production does not become boutique merely because the company is, and a conventional cigar does not become specialized through association. The unit being evaluated has to be named first.

WHAT SURVIVES WITHOUT THE WORD

One of the most useful exercises in this paper was eventually removing the word altogether. When boutique disappears, the underlying qualities do not:

- **Tobacco discipline** remains.
- **Fermentation and aging** remain.
- **Blend authority** remains.
- **Craftsmanship** remains.
- **Reputation** remains.
- **Proximity** remains.
- **Accountability** remains.
- **Restraint** remains.

- **The relationship** between the people responsible for the cigar and the people who ultimately smoke it remains.

Those things can be examined without the label. Perhaps that is the safest way to use boutique at all: let the word begin the inquiry rather than end it.

Even with a layered definition and the Vortex, reasonable people will disagree at the edges. I am comfortable with that. After more than fifty manufacturer and industry voices, retailers across multiple markets, media and community perspectives, wholesale and distribution input, twenty manufacturer questions, and the difficult cases examined throughout this paper, disagreement at the edges is far more credible than false precision at the center.

I am not ready to throw the word away, but I am also not willing to let it do work it has not earned. If somebody calls a company, brand, or cigar boutique, my next question remains the same one this paper kept asking: **based on what?**

Size, ownership, control, process, proximity, identity, scarcity, distribution, and operating discretion can all be examined. Each can tell us something; none should be permitted to impersonate the whole answer. The label can begin the conversation. The evidence, and ultimately the cigar itself, have to finish it.

ACKNOWLEDGEMENTS

There are a lot of people to thank after a project like this, especially the many I bothered while chasing down a term the industry uses constantly and defines suspiciously.

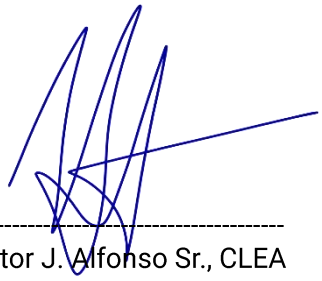
Special thanks to Fred Rewey, who told me the idea sounded worthwhile and then immediately took a phone call. In hindsight, that may have been the cleanest possible assessment of the project.

Special thanks also to John McTavish, who immediately began talking through data methodology, collection structure, and how to parse the information properly. Then I took a phone call, which feels about right for serious research in the premium cigar industry.

My thanks to everyone who answered questions, offered quotes, challenged assumptions, corrected my thinking, made suggestions, or gave me enough material to make the problem more complicated than when I started.

Dr. Paul B.K. Garmirian and Lew Rothman deserve a separate thank you. Both gave this project something a modern market snapshot cannot manufacture: historical memory from men who watched the premium cigar business change before much of today's boutique vocabulary had settled into common use. Their perspective helped keep the paper from treating the present as though it invented the past.

That, unfortunately, was the point.



Hector J. Alfonso Sr., CLEA

CONTRIBUTORS

This paper was possible only through the participation, perspective, and honest candor of cigar makers, brand owners, retailers, operators, media voices, and community participants across the premium cigar industry. Their insights lit the path. This work is stronger because of you.

MANUFACTURERS / INDUSTRY

Justin Andrews, New Business Development Manager - Scandinavian Tobacco Group
Hector Becerra, U.S. National Sales Director - Casa 1910
Aric Bey, Founder - Black Star Line Cigars
José Blanco, Worldwide Brand Ambassador - Arturo Fuente Cigars
Matt Booth, Founder - Room101
James Brown, Founder - Black Label Trading Company / Black Works Studio
René Castaneda, President - Villiger North America
Glen Case, Founder - Kristoff Cigars
Sébastien Decoppet, Founder - Cavalier Genève Cigars
Nimish Desai, Industry Principal - Rocky Patel Premium Cigars
Jonathan Drew, Founder - Drew Estate and J.SANN & SON
Christian Eiroa, Founder - CLE Cigar Company / Eiroa
Justo Eiroa, President - JRE Tobacco
Erik Espinosa, President - Espinosa Premium Cigars
Billy Fakih, Co-Founder - Artesano Del Tobacco
Andre Farkas, Founder - Viaje Cigars
Abdel “AJ” Fernandez, Founder - AJ Fernandez Cigars
Guy Fieri, Co-Founder - Knuckle Sandwich Cigars
Dr. Paul B.K. Garmirian, Founder - PG Cigars
Paolo Garzaroli, President - Graycliff Cigars
Dion Giolito, Founder - Illusione Cigars
Litto Gomez, Founder - La Flor Dominicana Cigars
Casey Haugen, Vice President - CRUX Cigars
Michael Herklots, Co-Founder - Ferio Tego Cigars
Giselle Herrera, President - El Titan de Bronze Cigars
Jon Huber, Co-Founder - Crowned Heads Cigars
Pete Johnson, Founder - Tatuaje Cigars
Daniel Lance, Founder - Domain Cigars
Tom Lazuka, Co-Founder - Asylum Cigars
Mo Maali, Founder - Patina Cigars
Lee Marsh, Co-Founder - Stolen Throne Cigars
Skip Martin, Co-Founder - RoMa Craft Tobac
Jeremy McDonald, Founder - Wildfire Cigars
Nicholas Melillo, Founder - Foundation Cigar Company
Oliver Nivaud, National Sales Manager - United Cigars
Jorge Padrón, President - Padrón Cigars
Nick Perdomo Jr., President - Perdomo Cigars
Ernesto Pérez-Carrillo, Founder - Casa Carrillo
Sam Phillips, President - La Palina Cigars
Law Ream, Brand Activation Manager - Camacho Cigars
Terence Reilly, Vice President - Aganorsa Leaf
Ian Reith, Founder - Dapper Cigars
Rick Rodriguez, Founder - West Tampa Tobacco Company
Lew Rothman, Founder and Former CEO of JR Cigars
Steve Saka, Founder - Dunbarton Tobacco & Trust
Jonas Santana, President - Blackbird Cigars

Mel Shah, Founder - MBombay Tobacco
Michael Szczepankiewicz, Co-Founder - Powstanie Cigars
Oscar Valladares, Founder - Oscar Valladares Tobacco & Co.
Henderson Ventura, Founder - ADVentura Cigars
David West, Founder - Avowed Cigar Company

RETAILERS

Abe Dababneh - Smoke Inn Cigars - Boynton Beach, FL
Eric Drazen - Oak Glen Tobacconist - Raleigh, NC
Stephen Frank - Boll Weevil Cigars - Enterprise, AL
Jerry Gavito Jr. - Lake Worth Cigars - Lake Worth, TX
Tucker Hobbie - Wendell Cigar Company - Wendell, NC
Jeff Martinez - The Vault - Meridian, ID
Charles Oxendine - Anstead's Tobacco Company - Fayetteville, NC
Vick Shah - Norwood Royal Cigars - Chicago, IL
Alan Shuminer - Caribbean Cigars - Miami, FL
Tim Swanson - Cigars Daily - Phoenix, AZ
Jorge Valdes - Sabor Havana Cigars - Doral, FL
Dan Wood - Wooden Indian Cigars - Havertown, PA

MEDIA & CIGAR COMMUNITY

More than twenty-five media, cigar community, and lifestyle voices contributed to the paper. Their input informed the analysis, although participants were not quoted directly in the final manuscript.

SOURCES

This source record separates direct contributor material, published/open-source material, and the ranking data used in the market analysis. Direct interview and response material is treated as primary evidence; published-source comparisons are identified separately.

PRIMARY INTERVIEW AND CONTRIBUTOR RECORD

Manufacturer / industry record: the fifty-one named manufacturer, brand, and industry voices listed in the Contributors section. Guy Fieri and Jorge Padrón are published-source comparisons rather than direct study interviews. Lew Rothman responses are preserved as a historical industry / retail source.

Retail record: Abe Dababneh, Eric Drazen, Stephen Frank, Jerry Gavito Jr., Tucker Hobbie, Jeff Martinez, Charles Oxendine, Vick Shah, Alan Shuminer, Tim Swanson, Jorge Valdes, and Dan Wood.

Wholesale / distribution record: two experienced industry operators with retail and wholesale/distribution backgrounds. Their identities are withheld in the manuscript; their preserved responses are part of the working source-control record.

Media / community record: more than twenty-five media, cigar-community, and lifestyle participants. Their responses informed the qualitative analysis and are quoted in the final manuscript, but they are not individually attributed. Their identities and complete responses remain in the working source-control record.

Author observation: trade-show placement, retailer traffic, humidor behavior, event culture, digital participation, community visibility, release behavior, and market presence are used as observational evidence where expressly identified as such.

PUBLISHED AND OPEN-SOURCE MATERIAL

1. halfwheel. "Boutiques" 2013. Also the secondary source for the 1999 SMOKE Magazine production-threshold reference. https://halfwheel.com/editorial-boutiques/38674/

2. Cigar Coop. "2012 IPCPR Trade Show Preview – Part 1" 2012. https://cigar-coop.com/2012/07/2012-ipcpr-trade-show-preview-part-1.html

3. The Cigar Authority / David Garofalo. "What Exactly Is a Boutique Cigar?" 2015. https://thecigarauthority.com/what-exactly-is-a-boutique-cigar-david-garofalo-editorial/

4. halfwheel. "Boutique Cigar Association of America Launched" 2016. https://halfwheel.com/boutique-cigar-association-america-launched/173055/

5. Cigar Coop. "Boutique Cigar Association Ends Non-Profit Status and Moves to Social Community Platform" 2020. https://cigar-coop.com/2020/12/cigar-news-boutique-cigar-association-ends-non-profit-status-and-moves-to-social-community-platform.html

6. Tobacco Business. "Retailers Talk Boutique Cigars" https://tobaccobusiness.com/retailers-talk-boutique-cigars/

7. Stogie Press. "Boutique Cigars and the Start of the Stogie Press 2015 Top 25 Cigars" https://stogiepress.com/boutique-cigars-and-the-start-of-the-stogie-press-2015-top-25-cigars/

8. Stogie Press. "Boutique Cigars – My Definition" https://stogiepress.com/boutique-cigars-my-definition/

9. Cigars.com. “What You Need to Know About Boutique Cigars” https://www.cigars.com/embers-insights/article/need-know-about-boutique-cigars/

10. Cigar Dojo. “Top 5 Boutique Cigar Brands to Watch in 2026” 2026. https://cigardojo.com/2026/02/top-5-boutique-cigar-brands-to-watch-in-2026/

11. Tobacco Business. “Mombacho Cigars: Redefining Boutique” https://tobaccobusiness.com/mombacho-cigars-redefining-boutique/

12. Tobacco Business / Antoine Reid. “Category Kings: The Rise of Boutique Cigars” November 17, 2021. https://tobaccobusiness.com/category-kings-boutique-cigars/

13. Cigar Inspector. “Boutique cigars… Is there a difference?” August 25, 2022. https://cigarinspector.com/cigar-library/boutique-cigars-is-there-a-difference/

14. Cigar Press. “The Unusual Suspects 2 – Matt Booth of Room101 Cigars” Retrospective on the original 2012 “Unusual Suspects” feature, Volume 5, Issue 4. https://cigarpress.com/the-unusual-suspects-2-matt-booth/

15. Cigar Aficionado / Marvin R. Shanken. “An Interview with Ernesto Perez-Carrillo” May/June 1997. https://www.cigaraficionado.com/article/an-interview-with-ernesto-perez-carrillo-6118

16. Cigar Aficionado / David Savona. “A Conversation with the Padróns” September/October 2010. https://www.cigaraficionado.com/article/a-conversation-with-the-padrons-15577

17. U.S. Department of the Treasury, Office of Foreign Assets Control. “Cuba Sanctions.” Official sanctions-program guidance governing transactions involving Cuba and Cuban-origin merchandise. https://ofac.treasury.gov/sanctions-programs-and-country-information/cuba-sanctions

18. Cigar Aficionado / David Savona. “A Guy On The Move” July/August 2023. Published-source context for Guy Fieri’s cigar-industry involvement and the Knuckle Sandwich outlier discussion. https://www.cigaraficionado.com/article/a-guy-on-the-move

19. Cigar Journal. “BCA Announces Alignment with Leading National Trade Associations” November 24, 2025. https://www.cigarjournal.com/bca-announces-alignment-with-leading-national-trade-associations/

20. Habanos, S.A. “Special Productions.” Official background on Ediciones Limitadas and Regional Editions, including limited quantities, unusual formats, regional distribution, and numbered boxes. https://www.habanos.com/en/special-productions/

21. Habanos, S.A. “Corporación Habanos, S.A. Achieves a Record Revenue of 827 Million Dollars in 2024.” February 24, 2025. Official market rankings and regional sales-value shares. https://www.habanos.com/en/news/corporacion-habanos-s-a-achieves-a-record-revenue-of-827-million-dollars-in-2024/

22. InterTabac. Official visitor and exhibitor information for the Dortmund trade fair, including the event's international scope and announced 2026 exhibitor participation. https://www.intertabac.de/

Source-control note: the 1999 SMOKE Magazine threshold is cited through halfwheel’s 2013 “Boutiques” discussion because the original SMOKE article was not independently recovered. No direct inspection of the 1999 article is claimed.

RANKING AND CONSENSUS DATA, 2020 - 2025

For the ranking analysis, the first twenty-five positions were counted from each annual list, even where a publication ranked more than twenty-five cigars. Percentages in the manuscript are the author's aggregation of those annual placements across the 2020–2025 period.

Cigar Coop — 2020 Cigar of the Year Countdown: https://cigar-coop.com/2020-cigar-of-the-year

Cigar Coop — 2021 Cigar of the Year Countdown: https://cigar-coop.com/2021-cigar-of-the-year

Cigar Coop — 2022 Cigar of the Year Countdown: https://cigar-coop.com/2022-cigar-of-the-year

Cigar Coop — 2023 Cigar of the Year Countdown: https://cigar-coop.com/2023-cigar-of-the-year

Cigar Coop — 2024 Cigar of the Year Countdown: https://cigar-coop.com/2024-cigar-of-the-year

Cigar Coop — 2025 Cigar of the Year Countdown: https://cigar-coop.com/2025-cigar-of-the-year

halfwheel — Top 25 Cigars archive (annual lists, 2020–2025): https://halfwheel.com/category/miscellaneous/awards/top-25-cigars/

halfwheel — The Consensus archive (annual aggregate lists, 2020–2025): https://halfwheel.com/category/miscellaneous/awards/the-consensus/

Cigar Aficionado — Top 25 archive (2020–2025): https://www.cigaraficionado.com/top25

Cigar Snob — Top 25 archive (2020–2025): https://www.cigarsnobmag.com/top-25/

The halfwheel Consensus is treated as a separate aggregate recognition system because it combines year-end lists from many cigar-media outlets. It is not treated as an independent blind-tasting panel or as proof of objective market consensus.

SOURCE PROVENANCE NOTES

Direct Q&A and preserved contributor responses remain the controlling source where available. Manuscript-preserved fallback material is used only where the fuller raw response no longer survives. Published-source comparisons are not represented as direct interviews conducted for this project.

Translations from Spanish-language contributor responses are identified in the working source record. Anonymous wholesale/distribution and media/community responses remain unattributed by design.

The research base also includes working notes, preserved emails, interview-response files, ranking worksheets, and source-control documents maintained during the project. Those internal materials support the manuscript but are not public-facing publications and therefore do not carry public URLs.

COPYRIGHT AND USE NOTICE

© 2026 Hector J. Alfonso Sr. / Analyst Ink LLC. All rights reserved. No portion of this publication may be reproduced, republished, distributed, transmitted, adapted, or used in whole or in part, in any form or by any means, without prior written permission from the copyright holder, except for brief quotations used for review, commentary, scholarship, or other uses permitted by law. The opinions, analysis, models, charts, and original classifications contained in this publication remain the intellectual property of the author and Analyst Ink LLC.

INDEX

Names, companies, and principal analytical subjects are indexed below. Page references point to substantive discussion rather than contributor and source-list appearances.

A

ADVentura Cigars. See Ventura, Henderson
Aganorsa Leaf. See Reilly, Terence
AJ Fernandez Cigars. See Fernandez, Abdel “AJ”
Andrews, Justin (Scandinavian Tobacco Group), 54, 107
Anstead’s Tobacco Company. See Oxendine, Charles
Artesano Del Tobacco. See Fakih, Billy
Arturo Fuente Cigars. See Blanco, José
Asylum Cigars. See Lazuka, Tom
Avowed Cigar Company. See West, David

B

Becerra, Hector (Casa 1910), 81–82, 107
Bey, Aric (Black Star Line Cigars), 80–82, 107
Blackbird Cigars. See Santana, Jonas
Black Label Trading Company. See Brown, James
Black Star Line Cigars. See Bey, Aric
Blanco, José (Arturo Fuente Cigars), 73–74, 107
blend ownership and portability, 65
Boll Weevil Cigars. See Frank, Stephen
Booth, Matt (Room101), 24–25, 52, 54, 91, 103, 106–107
Boutique Cigar Association, 7–8
Boutique Vortex, 110–123, 130
Brown, James (Black Label Trading Company / Black Works Studio), 24–25, 27, 48, 50, 63, 86, 98, 101, 103, 106–107

C

Camacho Cigars. See Ream, Law
Caribbean Cigars. See Shuminer, Alan
Casa 1910. See Becerra, Hector
Casa Carrillo. See Pérez-Carrillo, Ernesto
Case, Glen (Kristoff Cigars), 54–56, 103, 106, 128
Castaneda, René (Villiger North America), 60–61
Cavalier Genève Cigars. See Decoppet, Sébastien
Cigars Daily. See Swanson, Tim
classification boundary and exclusion test, 123
CLE Cigar Company / Eiroa. See Eiroa, Christian
company vs. cigar classification, 60–63
control and authority, 62–67
counterarguments and self-audit, 124–127
craftsmanship and scale, 70–78
Crowned Heads Cigars. See Huber, Jon
CRUX Cigars. See Haugen, Casey
Cuban cigars and scarcity, 9–11
customer attachment and role-conversion pathway, 15–22

D

Dababneh, Abe (Smoke Inn Cigars), 30
Dapper Cigars. See Reith, Ian
Decoppet, Sébastien (Cavalier Genève Cigars), 49, 51, 106
definition of boutique, author’s, 103–106
Desai, Nimish (Rocky Patel Premium Cigars), 93–95, 108
direct-to-consumer manufacturer sales, 42–43
distribution and durability, 41–42
Domain Cigars. See Lance, Daniel
Drazen, Eric (Oak Glen Tobacconist), 35
Drew Estate and J.SANN & SON. See Drew, Jonathan

Drew, Jonathan (Drew Estate and J.SANN & SON), 24–25, 58, 78–79, 106–107, 120
Dunbarton Tobacco & Trust. See Saka, Steve

E

Eiroa, Christian (CLE Cigar Company / Eiroa), 51, 73, 91, 107
Eiroa, Justo (JRE Tobacco), 64–65, 106
El Titan de Bronze Cigars. See Herrera, Giselle
Espinosa, Erik (Espinosa Premium Cigars), 24–25, 27, 49–50, 67, 73, 87–89, 100–101, 106–108
Espinosa Premium Cigars. See Espinosa, Erik
Europe and InterTabac, 43–44

F

factory ownership and contract production, 61–66
Fakih, Billy (Artesano Del Tobacco), 71–72, 88, 107
Farkas, Andre (Viaje Cigars), 24–25, 27, 48, 50, 52, 82, 90, 98–99, 101, 103, 107–108
Ferio Tego Cigars. See Herklots, Michael
Fernandez, Abdel “AJ” (AJ Fernandez Cigars), 61, 106
Fieri, Guy (Knuckle Sandwich Cigars), 122
Foundation Cigar Company. See Melillo, Nicholas
Frank, Stephen (Boll Weevil Cigars), 32, 35

G

Garmirian, Paul B.K. (PG Cigars), 51, 68, 85, 107
Garzaroli, Paolo (Graycliff Cigars), 68, 107, 121
Gavito Jr., Jerry (Lake Worth Cigars), 32
Giolito, Dion (Illusione Cigars), 24, 26, 52, 91, 106
Gomez, Litto (La Flor Dominicana Cigars), 68, 83, 121
Graycliff Cigars. See Garzaroli, Paolo

H

Haugen, Casey (CRUX Cigars), 54, 86–89, 106–107
Herklots, Michael (Ferio Tego Cigars), 58, 70, 72, 103, 107, 120
Herrera, Giselle (El Titan de Bronze Cigars), 49–50, 106
Hobbie, Tucker (Wendell Cigar Company), 32
Huber, Jon (Crowned Heads Cigars), 24–26, 50, 52, 86, 106–107

I

Illusione Cigars. See Giolito, Dion
independence, 65–67

J

Johnson, Pete (Tatuaje Cigars), 24, 26–27, 52, 57–58, 61, 93, 96–98, 101, 106, 108, 128
JR Cigars. See Rothman, Lew
JRE Tobacco. See Eiroa, Justo

K

Knuckle Sandwich Cigars. See Fieri, Guy
Kristoff Cigars. See Case, Glen

L

La Flor Dominicana Cigars. See Gomez, Litto
Lake Worth Cigars. See Gavito Jr., Jerry
Lance, Daniel (Domain Cigars), 54–55, 75, 106–107
La Palina Cigars. See Phillips, Sam
Lazuka, Tom (Asylum Cigars), 60–61, 76, 106

M

Maali, Mo (Patina Cigars), 82–85, 87, 107
manufacturer agreement and division matrix, 106–108
marketing, boutique as, 86–96
market perception and access, 68, 108–123, 128–131
Marsh, Lee (Stolen Throne Cigars), 57, 58

Martinez, Jeff (The Vault), 34
Martin, Skip (RoMa Craft Tobac), 7, 24, 26, 52, 73, 99, 101, 106–107
MBombay Tobacco. See Shah, Mel
McDonald, Jeremy (Wildfire Cigars), 78, 80, 84, 88, 107
Melillo, Nicholas (Foundation Cigar Company), 24, 26–27, 70, 75–76, 99, 101, 107–108

N

Nivaud, Oliver (United Cigars), 89, 107
Norwood Royal Cigars. See Shah, Vick

O

Oak Glen Tobacconist. See Drazen, Eric
Oscar Valladares Tobacco & Co. See Valladares, Oscar
outlier cases, 118–123
Oxendine, Charles (Anstead’s Tobacco Company), 35

P

Padrón Cigars. See Padrón, Jorge
Padrón, Jorge (Padrón Cigars), 119
Patina Cigars. See Maali, Mo
Perdomo Cigars. See Perdomo, Nick Jr.
Perdomo, Nick Jr. (Perdomo Cigars), 57–58, 65, 91, 103, 106–107
Pérez-Carrillo, Ernesto (Casa Carrillo), 8, 24, 26, 51, 90, 100–101
PG Cigars. See Garmirian, Paul B.K.
Phillips, Sam (La Palina Cigars), 64–65, 87, 103, 107
Powstanie Cigars. See Szczepankiewicz, Michael
premium vs. boutique, 70–72

R

rankings and visibility, 12–14
Ream, Law (Camacho Cigars), 66–67, 73, 107, 122
regional brand strength, 42
regulatory pressure and independence, 67
Reilly, Terence (Aganorsa Leaf), 49–50, 60, 62–63, 106
Reith, Ian (Dapper Cigars), 58, 83–84, 106–107
retail and humidor behavior, 28–37
retailer accuracy and misinformation, 32–33
retailer-media role overlap, 39–40
risk, 78–80
Rocky Patel Premium Cigars. See Desai, Nimish
Rodriguez, Rick (West Tampa Tobacco Company), 66–67, 107
RoMa Craft Tobac. See Martin, Skip
Room101. See Booth, Matt
Rothman, Lew (JR Cigars), 50–51, 91, 93, 106–108

S

Sabor Havana Cigars. See Valdes, Jorge
Saka, Steve (Dunbarton Tobacco & Trust), 24, 26, 52, 56, 62, 90, 101, 103, 106–108
Santana, Jonas (Blackbird Cigars), 54–55, 83, 106
scale and size, 54–57, 72–78
Scandinavian Tobacco Group. See Andrews, Justin
scarcity and restraint, 68, 82–86
Shah, Mel (MBombay Tobacco), 52, 83, 107
Shah, Vick (Norwood Royal Cigars), 32
Shuminer, Alan (Caribbean Cigars), 30
signal vs. structure, 42–47
Smoke Inn Cigars. See Dababneh, Abe
social media and cigar community, 14–22, 37–41
Stolen Throne Cigars. See Marsh, Lee
succession and founder continuity, 22
Swanson, Tim (Cigars Daily), 31
Szczepankiewicz, Michael (Powstanie Cigars), 88–90, 107

T

Tatuaje Cigars. See Johnson, Pete
The Vault. See Martinez, Jeff
trade-show test, 12

U

United Cigars. See Nivaud, Oliver

V

Valdes, Jorge (Sabor Havana Cigars), 30
Valladares, Oscar (Oscar Valladares Tobacco & Co.), 88, 93, 95, 108
Ventura, Henderson (ADVentura Cigars), 73–74, 107
Viaje Cigars. See Farkas, Andre
Villiger North America. See Castaneda, René

W

Wendell Cigar Company. See Hobbie, Tucker
West, David (Avowed Cigar Company), 58, 76, 107
West Tampa Tobacco Company. See Rodriguez, Rick
white labeling, 63
Wildfire Cigars. See McDonald, Jeremy
Wood, Dan (Wooden Indian Cigars), 34–35
Wooden Indian Cigars. See Wood, Dan