

Key Highlights



A total of 470,080 60-kilo bags of coffee valued at US\$ 78.92 million were exported in October 2023 at an average price of US\$ 2.73/kilo US cents 7 higher than September 2023 and US cents 35 higher than US\$ 2.36/kilo in October 2022. This was an increase of 3.35% and 18.32% in quantity and value respectively compared to the same month last year.



Farm-gate prices for Robusta Kiboko averaged UGX 3,900 per kilo; FAQ UGX 7,650 per kilo, Arabica parchment UGX 9,250 per kilo and Drugar UGX 8,250 per kilo.



Coffee exports for the twelve months (November 2022-October 2023) totaled 6.16 million bags worth US\$ 952.24 million compared to 5.83 million bags worth US\$ 883.30 million in the previous period(November 2021-October 2022). This represents an increase of 6% and 8% in quantity and value respectively.



82% of the total volume was exported by 10 exporters, out of 50 companies which performed during the month compared to 80% in September 2023.

Bugisu A+ fetched the highest price at US \$ 5.15 per kilo.

1. Coffee exports

Coffee exports in October 2023, amounted to 470,080 60-kilo bags, worth US\$ 78.96 million as shown in Fig 1. This comprised 410,113 bags of Robusta valued at US \$ 66.87 million and 59,967 bags of Arabica valued at US\$ 12.10 million (see Table 1 and Annex 1). This was an increase of 3.35% and 18.32% in quantity and value respectively compared to the same month last year.

By comparing quantity of coffee exported by type in the same month of last Coffee Year (October 2022), Robusta increased by 3.42% and 26.25% in quantity and value respectively, while Arabica exports increased by 2.86% in quantity but decreased by 12.18% in value.

The monthly coffee exports performance was higher than the previous year on account of a good crop harvest in South-Western region and the prevailing good prices on the global scene which prompted exporters to release their stocks.

Coffee exports for the twelve months (November 2022-October 2023) totaled 6.16 million bags worth US\$ 952.24 million compared to 5.83 million bags worth US\$ 883.30 million in the previous period (November 2021-October 2022). This represents an increase of 5.57% and 7.81% in quantity and value respectively.

Fig 1: Trend of Total Quantity and Value of Coffee exports. November 2022- October 2023



Table1: Comparison of Coffee Exports of October 2022/23 and 2023/24 Coffee Years

Period/Coffee Type	2022/23		2023/24		%age Change	
	Qty(60-kg bags)	Value (US \$)	Qty(60-kg bags)	Value (US \$)	Qty	Value
October Total	454,850	66,737,678	470,080	78,962,384	↑ 3.35	↑ 18.32
Robusta	396,548	52,963,465	410,113	66,865,376	↑ 3.42	↑ 26.25
Arabica	58,302	13,774,214	59,967	12,097,008	↑ 2.86	↓ -12.18

3. Exports by Type and Grade

Table 2 shows coffee exports by type, grade and average realized price for each grade during the month of October 2023. The average export price was US\$ 2.80 per kilo, US cents 7 higher than September 2023. It was 35 US cents higher than in October 2022 (US \$ 2.45/kilo). Robusta exports accounted for 87% of total exports, lower than 94% in August 2023. The average Robusta price was US\$ 2.72 per kilo, 2 cent higher than US\$ 2.70 per kilo the previous month. The highest price was Screen 14 sold at US\$ 3.20 per kilo. It was followed by Organic Robusta sold at US\$ 3.03 per kilo, 20 cents higher than conventional Screen 18.

The share of Sustainable/washed coffee to total Robusta exports was 2.34% compared to 2.01% in September 2023. Arabica fetched an average price of US\$ 3.36 per kilo compared to 3.11 per kilo last month, US cents 25 higher than US\$ 3.14 per kilo realized in September 2023. The highest price was Bugisu A+ sold at US\$ 5.15 per kilo. It was followed by Mt. Elgon A+ sold at US\$ 4.41 per kilo. Drugar was sold at US\$ 3.31 per kilo, 6 cents higher than 3.25 per kilo last month. This price was US cents 18 lower than Bugisu AA. Drugar exports were 40% of total Arabica exports the same as the previous month. The share of sustainable Arabica exports to total Arabica exports was 4.74% compared to 5.22% in September 2023.

Table 2: Coffee Exports by Type, Grade & Unit Price in October 2023

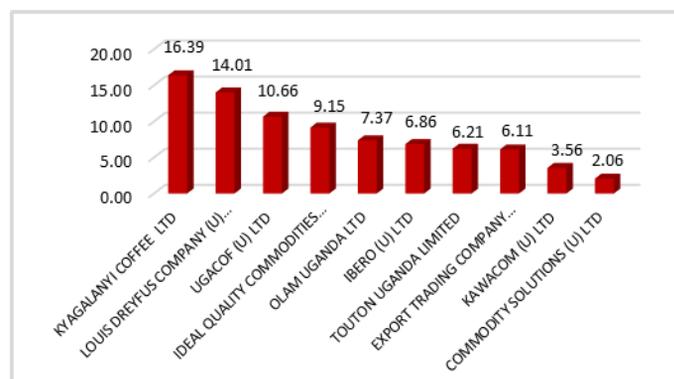
Coffee type	Quantity 60-Kilo Bags	%-age Quantity	Value in US \$	%-age Value	Unit Price US\$/Kilo
Total	470,080		78,962,384		2.80
Organic Robusta	2,030	0.49	368,775	0.55	3.03
Washed Robusta	1,340	0.33	223,287	0.33	2.78
Screen 18 organic	720	0.18	108,572	0.16	2.51
Screen 15 organic	2,120	0.52	312,494	0.47	2.46
Screen 15 Fairtrade	1,970	0.48	292,423	0.44	2.47
Screen 14 Organic	1,040	0.25	170,795	0.26	2.74
Screen 12 Organic	360	0.09	52,143	0.08	2.41
Screen 18	94,637	23.08	16,045,977	24.00	2.83
Screen 17	23,743	5.79	3,955,408	5.92	2.78
Screen 15	157,987	38.52	25,923,521	38.77	2.73
Screen 14	35,458	8.65	6,811,158	10.19	3.20
Screen 12	38,912	9.49	6,197,568	9.27	2.65
BHP 1199	26,374	6.43	3,211,002	4.80	2.03
Other Robustas	23,422	5.71	3,192,252	4.77	2.27
Total Robustas	410,113	100.00	66,865,376	100.00	2.72
Bugisu A+	2,520	4.20	778,205	6.43	5.15
Mt Elgon A+	320	0.53	84,657	0.70	4.41
Bugisu AA	2,855	4.76	597,893	4.94	3.49
Bugisu A	64	0.11	12,672	0.10	3.30
Bugisu CPB	3,206	5.35	599,439	4.96	3.12
Bugisu AB	2,614	4.36	509,242	4.21	3.25
Bugisu C	320	0.53	81,249	0.67	4.23
Mixed Arabica	1,282	2.14	157,188	1.30	2.04
Wugar	3,842	6.41	955,563	7.90	4.15
Drugar	39,594	66.03	7,863,889	65.01	3.31
Other Arabicas	3,350	5.59	457,011	3.78	2.27
Total Arabica	59,967	100.00	12,097,008	100.00	3.36

3. Individual Exporter Performance

Figure 2 shows the top 10 export companies' performance in the month of October 2023. Kyagalanyi Coffee Ltd had the highest market share of 16.39% compared to 7.35% in September 2023. It was followed by Louis Dreyfus Company (U) Ltd 14.01% (8.93%); Ugacof (U) Ltd 10.66% (16.62%); Ideal Quality Commodities Ltd 9.15% (9.37%), Olam Uganda Ltd 7.37% (12.18%); Ibero (U) Ltd 6.86% (7.86%); Touton Uganda Ltd 6.21% (4.75%); Export Trading Company (U) Ltd 6.11% (4.01%); Kawacom (U) Ltd 3.56% (5.76%); and Commodity Solutions (U) Ltd 2.06% (0.17%) *The figures in brackets represent percentage market share held in September 2023.

The top 10 exporters held a market share of 82% higher than 80% the previous month reflecting increasing concentration. Changes in exporter positions compared to last month show competition at this level. Out of the 50 exporters who performed, 22 exported Robusta Coffee only while 9 exported Arabica coffee only. **Annex 2** shows a detailed list of exporters' performance in October 2023.

Figure 2: Top 10 Exporting Companies by percentage market share



4. Coffee Exports By Destination

The destinations of Uganda’s coffee exports during the month of October 2023 are shown in **Fig 3** (details in **Annex 4**). Italy maintained the highest market share with 28.95% compared to 35.11 % last month. It was followed by Germany 17.19% (22.48%), Spain 9.74% (3.92%), India 7.40% (7.08%) and Algeria 5.56% (4.25%). **The figures in brackets represent percentage market share held in September 2023.* The first 10 major destinations of Uganda coffee took a market share of 87.62% compared to 91.55% last month. Coffee exports to Africa amounted to 90,042 bags, a market share of 19% compared to 104,844 bags (18%) the previous month. African countries that imported Uganda coffee included Sudan, Morocco, Algeria, Tunisia, South Africa, Egypt, and Kenya. Europe remained the main destination for Uganda’s coffees with a 68% imports share, slightly lower than 70% in September 2023.

5. Foreign buyers of Uganda Coffee

Annex 4 shows a list of Ugandan coffee foreign buyers in October 2023. The top 10 buyers held a market share of 67% of total exports, lower than 71% the previous month. Louis Dreyfus led with a market share of 13.93% compared to 8.93% in September 2023. It was followed by Sucafina 11.02% (16.56%); Volcafe 8.70% (3.16%); Olam International 7.37% (13.11%); Bernhard Rothfos 6.86% (7.85%) Touton SA 6.21% (4.92%); Hamburg Coffee 3.77%; (2.98%) GRB 3.52% (3.31%) Ecom Agroindustrial Corp 3.33% (4.53%); and Altasheel Import & Export Enterprises 2.67% (5.09%) *Note: The figures in brackets represent percentage performance in the previous month – September 2023.*

There were changes in the relative positions of the first 10 major buyers reflecting competition among buyers due to continued demand for Uganda coffee abroad.

Figure 3: Top ten export destinations by percentage market share

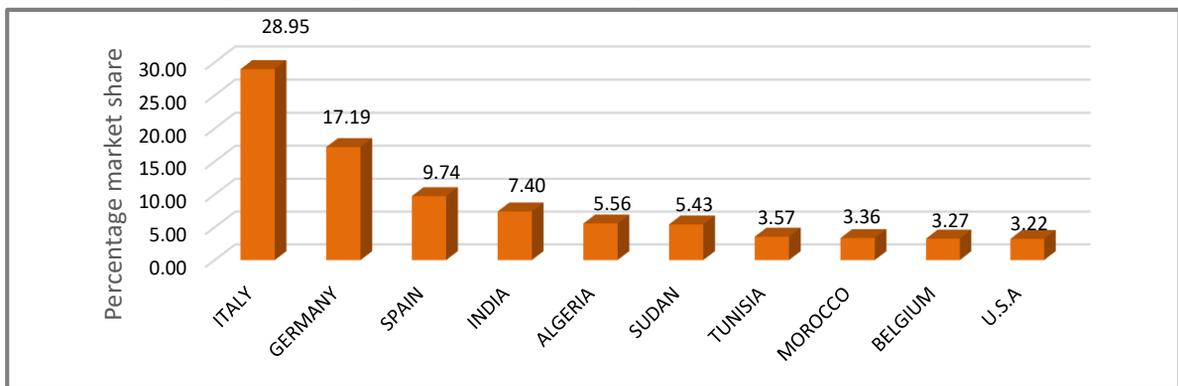


Figure 4: Percentage export share by continent

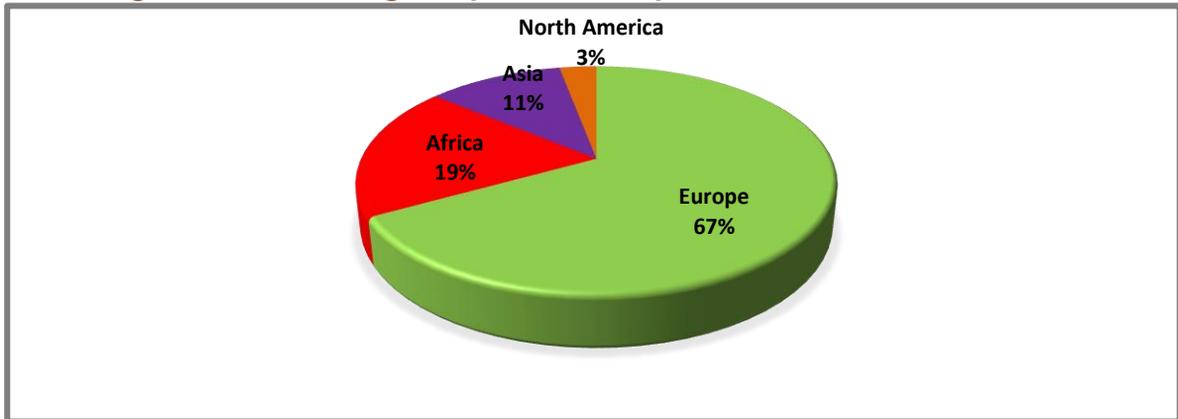
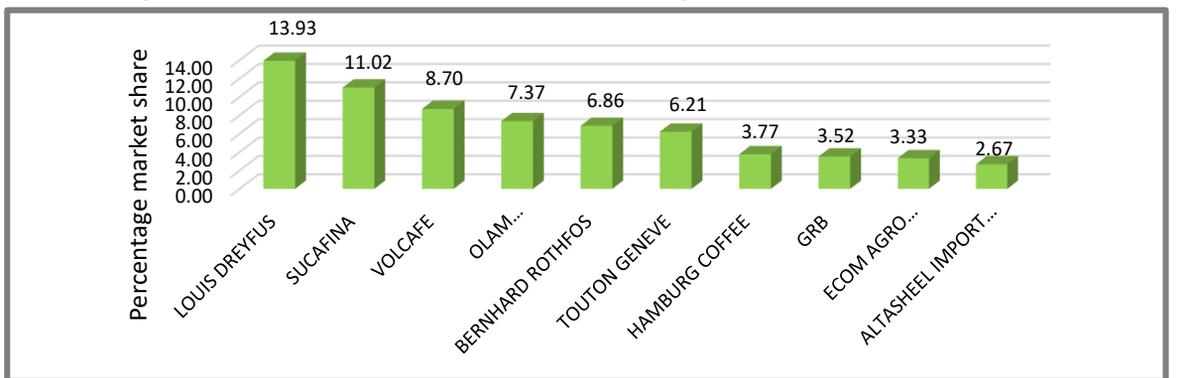


Figure 5: Top ten buyers by percentage market share



6. Global Situation

World coffee production for 2023/24 is forecast to reach 174.3 million bags, 4.3 million bags higher than the previous Year, with higher output in Brazil and Vietnam expected to more than offset reduced production in Indonesia. Global exports are expected to increase by 5.8 million bags to a record 122.2 million bags higher than 116.4 million bags the previous year, primarily on strong shipments from Brazil. Global consumption is forecast at 170.2 million bags, with the largest increase in the European Union, the United States of America and Brazil. Ending stocks are expected to be 31.8 million bags. (United States Department of Agriculture, Coffee: World Markets and Trade report-June 2023).

7. Local Situation

During the month of October 2023, farm gate prices ranged from Sh.3,800-4,000/= per kilo of Kiboko (Robusta dry cherries); Shs. 7,500-7,800/= for FAQ (Fair Average Quality); Sh. 9,000- 9,500/= for Arabica parchment; and Sh. 8,000-8,500/= per kilo for Drugar from Kasese. Robusta Kiboko averaged UGX 3,900 per kilo; FAQ UGX 7,650 per kilo lower than the previous month, Arabica parchment UGX 9,250 per kilo the same as the previous month and Drugar UGX 8,250/= per kilo the same as the previous month last month.

8. Coffee Consumption Promotional Activities

During the month, UCDA promoted coffee consumption during the following events:

The 29th UMA international trade fair that took place from the 3rd -10th October 2023; the International Coffee Day celebrations in Kasese held on 5th October 2023; the Kisoboka Agriculture shows that took place in three districts of Kagadi, Kibaale and Kakumiro from the 6th to the 8th October 2023; the 2nd edition of the Uganda United Arab Emirates Trade and Business Forum held at Speke Resort Muyonyo from the 10th to the 13th October 2023; the World Food Day Celebrations 2023 held on 16th October in Kizuza-Mukono; the 13th Annual Coffee Platform Stakeholders meeting themed "The Coffee Roadmap: Shaping a Sustainable Landscape for Growth and Value Addition in the coffee Sub sector" held on 19th October 2023 at Mestil Hotel in Kampala; and the Blood donation drives held on 13th October at Coffee house and on 20th October 2023 in Nakivubo. Over 20,000 cups of coffee were brewed using different brewing techniques for demonstration purposes and coffee was provided for tasting. Information on coffee trade, investment opportunities in the sector, coffee types, grades, and benefits of taking coffee was explained to the attendees. The taste of Ugandan coffee was appreciated by 90% of the attendees.

Capacity building was conducted in coffee brewing techniques for 42 youths (22 Female,20 Male) from Hotels, Restaurants and Cafes at the UCDA Lugogo laboratory.

They were taught basic coffee knowledge, brewing and barista techniques using various brewing equipment's. This initiative is a core component to elevate the quality of coffee served in prominent hotels. By doing so, it not only enhances domestic consumption and value addition but also serves as a powerful promotional tool for Ugandan coffee on the global stage

9. Coffee Development Activities

During the month of October 2023, the Development Services Directorate organized comprehensive field inspection of 147 nurseries distributed across various coffee regions in the country, with a focus on assessing the quality and quantity of coffee seedlings being raised and distributed for planting. In Mid North and West Nile, 11 nursery operators raised 30,000CWDr, 110,000 Elite Robusta, and 330,000 Arabica plants.

Coffee rehabilitation efforts involved stumping 151,078 old and unproductive coffee trees, with significant numbers in Rwenzori, Western, Northern, Eastern, and Southwestern regions. Notably, 75 coffee demonstrations were established on coffee rehabilitation for old and unproductive coffee trees and others on good agronomic practices. As we strive to address challenges of depleted soils, field staff collected and analyzed soil samples across regions which highlighted specific nutrient deficiencies, leading to recommendations for farmers to use nitrogen-rich fertilizers and organic manure to improve soil fertility.

Capacity-building training sessions implemented during the month reached to 2,846 farmers across 126 local governments, with additional farm visits providing practical guidance. Emphasis was placed on general Good Agronomic Practices (GAPs), coffee rehabilitation, appropriate fertilizer use, soil and water conservation, and pest and disease management. Notably, the black coffee twig borer, red blister disease, and Coffee Wilt Disease were identified as prevalent pests and diseases in different regions.

The pretesting of a geospatial Monitoring and Evaluation (M&E) and farmer registration App recorded registrations and inspections in various regions, offering insights into the coffee value chain and feedback on operational and functional performance of the system in production environment. Registration of other coffee value chain actors, including hullers, stores, roasters, wet mills, and buyers, was documented across different regions. Factory facility inspections covered hullers, stores, roasters, and grading units, revealing the distribution and gender demographics of these facilities in different regions. This comprehensive overview provides a snapshot of the activities and challenges within the coffee industry during the period.

9. Outlook for November 2023

Coffee exports are projected to be 500,000 bags. The main harvesting season in Central and Eastern regions has started. Exporters will continue to drawdown on their stocks to fulfil contractual obligations with buyers.

Annex 2: List of Coffee Exporters and their Market Shares: October 2023

EXPORTING COMPANY	POSITION HELD IN SEPTEMBER	QUANTITY (Bags)			PERCENTAGE MARKET SHARE	
		Robusta	Arabica	Total	Individual	Cumulative
Total		410,113	59,967	470,080	100	
1 Kyagalanyi Coffee Ltd	6	64,955	12,102	77,057	16.39	16.39
2 Louis Dreyfus Company (U) Ltd	4	63,501	2,340	65,841	14.01	30.40
3 Ugacof (U) Ltd	1	43,951	6,160	50,111	10.66	41.06
4 Ideal Quality Commodities Ltd	3	41,422	1,571	42,993	9.15	50.20
5 Olam Uganda Ltd	2	27,596	7,044	34,640	7.37	57.57
6 Ibero (U) Ltd	5	30,948	1,280	32,228	6.86	64.43
7 Touton Uganda Limited	8	22,375	6,836	29,211	6.21	70.64
8 Export Trading Company (U) Ltd	9	27,075	1,667	28,742	6.11	76.76
9 Kawacom (U) Ltd	7	16,736		16,736	3.56	80.32
10 Commodity Solutions (U) Ltd	39	8,982	720	9,702	2.06	82.38
11 Sena Indo Uganda Limited	12	7,068	1,800	8,868	1.89	84.27
12 Ankole Coffee Producers Coop Union Ltd	13	8,370		8,370	1.78	86.05
13 Besmark Coffee Company Limited	10	1,378	6,520	7,898	1.68	87.73
14 Jber Coffee Ltd	14	7,000		7,000	1.49	89.22
15 JKCC General Supplies Ltd	11	6,370		6,370	1.36	90.57
16 Grainpulse Ltd	16	3,377		3,377	0.72	91.29
17 Gisha Coffee Ltd	38	334	3,028	3,362	0.72	92.01
18 Zigoti Coffee Works Ltd	17	2,892	416	3,308	0.70	92.71
19 Sukuma Commodities Limited	18	3,122		3,122	0.66	93.37
20 Seth & Cushman Market Traders Limited	43	3,102		3,102	0.66	94.03
21 Coffee World Ltd	21	2,008	670	2,678	0.57	94.60
22 Abbarci Industries Limited	30	2,320		2,320	0.49	95.10
23 Xag Coffee Exporters	23	350	1,336	1,686	0.36	95.46
24 Drogo Commodities Limited		1,500		1,500	0.32	95.78
25 Tata Uganda Limited	20	1,500		1,500	0.32	96.09
26 Agri Evolve	31		1,440	1,440	0.31	96.40
27 Bakwanye Trading Co. Ltd	44		1,360	1,360	0.29	96.69

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Exporting Company	POSITION HELD IN SEPTEMBER	QUANTITY (Bags)		Percentage Market Share		
		Robusta	Arabica	Total	Individual	Cumulative
28 Superbia International Coffee Trade Ltd	40	1,018	334	1,352	0.29	96.98
29 Kaweri Coffee Plantation	34	1,340		1,340	0.29	97.26
30 Mbale Importers & Exporters Ltd	27	1,332		1,332	0.28	97.55
31 Noble Commodities (U) Ltd	22	1,308		1,308	0.28	97.82
32 Rezlex Investment Ltd	25	668	640	1,308	0.28	98.10
33 Bakhsons Trading Co. (U) Ltd	24	1,028		1,028	0.22	98.32
34 Rubanga Cooperative Society Ltd	26	988		988	0.21	98.53
35 Banta African Coffee Limited		350	350	700	0.15	98.68
36 Two Rivers Investments Group Ltd		700		700	0.15	98.83
37 Karaz Coffee Factory		660		660	0.14	98.97
38 Zurbagan Uganda Limited		535	85	620	0.13	99.10
39 Robust Commodities Uganda Limited	42	600		600	0.13	99.23
40 Bowi Logistics Ltd			350	350	0.07	99.30
41 Nakana Coffee Factory Ltd	37	350		350	0.07	99.38
42 Orah Impex (U) Limited		350		350	0.07	99.45
43 Shiba World Investments Ltd			343	343	0.07	99.53
44 Darley Investments Ltd	19	334		334	0.07	99.60
45 Bugisu Coop Union Ltd			320	320	0.07	99.66
46 Bukonzo Joint Co-operative Union Ltd	47		320	320	0.07	99.73
Butta Farmers Co-operative Society 47 Limited			320	320	0.07	99.80
48 Funzo Coffee (U) Ltd		320		320	0.07	99.87
49 Mt Elgon Agroforestry Communities	51		320	320	0.07	99.94
50 Nucafe	33		295	295	0.06	100.00

Annex 4: Main Destinations of Uganda Coffee by Type in October 2023

DESTINATION	POSITION HELD IN SEPTEMBER	QUANTITY (60kg bags)			%AGE MARKET SHARE	
		Robusta	Arabica	Total	Individual	Cumulative
Total		410,113	59,967	470,080	100	
1 Italy	1	115,454	20,653	136,107	28.95	28.95
2 Germany	2	72,136	8,650	80,786	17.19	46.14
3 Spain	6	44,150	1,613	45,763	9.74	55.87
4 India	4	33,482	1,320	34,802	7.40	63.28
5 Algeria	5	26,153		26,153	5.56	68.84
6 Sudan	3	25,504		25,504	5.43	74.27
7 Tunisia		16,800		16,800	3.57	77.84
8 Morocco	7	15,774		15,774	3.36	81.20
9 Belgium	8	7,494	7,860	15,354	3.27	84.46
10 U.S.A	9	7,830	7,000	14,830	3.15	87.62
11 Russia	10	14,361	85	14,446	3.07	90.69
12 Japan	11	2,880	2,560	5,440	1.16	91.85
13 United Arab Emirates	17	4,260		4,260	0.91	92.75
14 Portugal	14	2,914	986	3,900	0.83	93.58
15 Egypt	11	3,521		3,521	0.75	94.33
16 Sweden	22		3,467	3,467	0.74	95.07
17 China	20	3,036	416	3,452	0.73	95.80
18 Netherlands	12	3,130		3,130	0.67	96.47
19 Kenya	21	300	1,695	1,995	0.42	96.89
20 Vietnam	15	1,770		1,770	0.38	97.27
21 United Kingdom	18	1,360	1,600	2,960	0.63	97.90
22 Switzerland	19	1,336		1,336	0.28	98.19
23 Israel	13	1,280		1,280	0.27	98.46
24 Turkey	25	640	350	990	0.21	98.67
25 Estonia		974		974	0.21	98.88
26 Poland	23	680		680	0.14	99.02
27 Greece		220	434	654	0.14	99.16

Annex 4: Main Destinations of Uganda Coffee by Type in October 2023

Destination	POSITION HELD IN SEPTEMBER	QUANTITY (60kg Bags)			%Age Market Share	
		Robusta	Arabica	Total	Individual	Cumulative
28 France		320	320	640	0.14	99.30
29 Saudi Arabia		640		640	0.14	99.43
30 Romania		360		360	0.08	99.51
31 Cape Verde		350		350	0.07	99.58
32 Iran		350		350	0.07	99.66
33 Bahrain			343	343	0.07	99.73
34 Albania	29	334		334	0.07	99.80
35 Finland	24	320		320	0.07	99.87
36 South Carolina			320	320	0.07	99.94
37 South Africa	26		295	295	0.06	100.00

Annex 5: List of Foreign Coffee Buyers during the Month of October 2023

	BUYERS	POSITION HELD IN SEPTEMBER	QUANTITY (60kg BAGS)		%AGE MARKET SHARE		
			Robusta	Arabica	Total	Individual	Cumulative
	Total		410,113	59,967	470,080	100	
1	Louis Dreyfus	3	63,151	2,340	65,491	13.93	13.93
2	Sucafina	1	45,961	5,860	51,821	11.02	24.96
3	Volcafe	9	37,330	3,559	40,889	8.70	33.65
4	Olam International	2	27,596	7,044	34,640	7.37	41.02
5	Bernhard Rothfos	4	30,948	1,280	32,228	6.86	47.88
6	Touton SA	6	22,375	6,836	29,211	6.21	54.09
7	Hamburg Coffee	11	14,334	3,371	17,705	3.77	57.86
8	GRB	8	13,680	2,852	16,532	3.52	61.38
9	Ecom Agro Industrialist	7	15,636		15,636	3.33	64.70
10	Altasheel Import & Export	5	12,554		12,554	2.67	67.37
11	Strauss	20	6,400	3,920	10,320	2.20	69.57
12	ETC Export		9,120	640	9,760	2.08	71.64
13	Bercher Coffee Consulting	19	3,006	5,440	8,446	1.80	73.44
14	Koninklijke Douwe	10	6,480	1,667	8,147	1.73	75.17
15	Pacorini Silocaf	21	7,316	360	7,676	1.63	76.81
16	Eurocaf Sas	12	7,320		7,320	1.56	78.36
17	Hafco Trading	17	7,000		7,000	1.49	79.85
18	Icona Café	15	5,700	1,280	6,980	1.48	81.34
19	CCL Products	13	6,780		6,780	1.44	82.78
20	Ibericafé Import S.L	24	5,221		5,221	1.11	83.89
21	Dek Berlin	23	5,040		5,040	1.07	84.96
22	Terracore	22	1,004	2,068	3,072	0.65	85.62
23	American Coffee		3,006		3,006	0.64	86.26
24	Nespresso		2,880		2,880	0.61	86.87
25	Nestle		2,880		2,880	0.61	87.48
26	Sichuan		2,752		2,752	0.59	88.07
27	Romani	25	1,414	1,336	2,750	0.59	88.65
28	Kaffee-import- Compagnie			2,470	2,470	0.53	89.18
29	Almathahib		2,100		2,100	0.45	89.62
30	Others		41,129	7,644	48,773	10.38	100.00