

MONTHLY REPORT-DECEMBER 2023

Key Highlights



A total of 401,336 60-kilo bags of coffee valued at US\$ 65.94 million were exported in December 2023 at an average price of US\$ 2.74/kilo US cents 3 lower than US\$ 2.77/Kilo in November 2023 and US cents 37 higher than US\$ 2.37/kilo in December 2022. This was a decrease of 4.17% in quantity but an increase of 10.76% in value compared to the same month last year.



Farm-gate prices for Robusta Kiboko averaged UGX **4,050** per kilo; FAQ UGX **8,750** per kilo, Arabica parchment UGX **10,250** per kilo and Drugar UGX **9,250** per kilo.



Coffee exports for the twelve months (Calendar year 2023) totaled 6.12 million bags worth US\$ 965.14 million compared to 5.63 million bags worth US\$ 860.45 million in the previous period (Calendar year 2022). This represents an increase of 12% and 9% in quantity and value respectively.



72% of the total volume was exported by 10 exporters, out of 49 companies which performed during the month compared to 76% in November 2023.

Sustainable Arabica fetched the highest price at US \$ 4.66 per kilo.

1. Coffee exports

Coffee exports in December 2023, amounted to 401,336 60-kilo bags, worth US\$ 65.94 million as shown in **Fig 1**. This comprised 337,026 bags of Robusta valued at US \$ 52.84 million and 64,310 bags of Arabica valued at US\$ 13.10 million (see *Table 1 and Annex 1*). This was a decrease of 4.17% in quantity and an increase of 10.76% in value compared to the same month last year.

By comparing quantity of coffee exported by type in the same month of last Coffee Year (December 2022), Robusta increased by 1.68% and 30.32 in quantity and value respectively, while Arabica exports decreased by 26.38% and 31.02 in quantity and value respectively.

The monthly coffee exports performance was lower than the previous year and this was partly on account of the harvest season that has delayed due to the rains that also delayed drying of the newly harvested coffee and a small harvest in Elgon region.

Coffee exports for the twelve months (Calendar year 2023) totaled 6.12 million bags worth US\$ 965.14 million compared to 5.63 million bags worth US\$ 860.45 million in the previous period (Calendar year 2022). This represents an increase of 12.17% and 8.58% in quantity and value respectively.

Fig 1: Trend of Total Quantity and Value of Coffee exports. January 2023- December 2023



Table1: Comparison of Coffee Exports of December 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
December Total	418,799	59,534,172	401,336	65,939,868	↓ -4.17	↑ 10.76
Robusta	331,446	40,547,821	337,026	52,843,493	↑ 1.68	↑ 30.32
Arabica	87,353	18,986,350	64,310	13,096,376	↓ -26.38	↓ -31.02

2. Exports by Type and Grade

Table 2 shows coffee exports by type, grade and average realized price for each grade during the month of December 2023. The average export price was US\$ 2.74 per kilo, US cents 3 lower than in November 2023 (US\$ 2.80). It was 37 US cents higher than in December 2022 (US \$ 2.37/kilo). Robusta exports accounted for 84% of total exports, lower than 80% in November 2023. The average Robusta price was US\$ 2.61 per kilo, 1 cent lower than US\$ 2.62 per kilo the previous month. The highest price was Washed Robusta sold at US\$ 2.86 per kilo and it was followed by Screen 18 sold at US\$ 2.83 per kilo.

The share of Sustainable/washed coffee to total Robusta exports was 1.15% compared to 3.51% in November 2023. Arabica fetched an average price of US\$ 3.39 per kilo US cents 3 higher than the previous month. The highest price was Sustainable Arabica sold at US\$ 4.66 per kilo. It was followed by Bugisu C sold at US\$ 4.23 per kilo. Drugar was sold at US\$ 3.23 per kilo, 8 cents lower than 3.31 per kilo last month, which was US cents 33 lower than Bugisu AA. Drugar exports were 43% of total Arabica exports lower than 52% the previous month. The share of sustainable Arabica exports to total Arabica exports was 11.73% compared to 7.05 in November 2023.

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

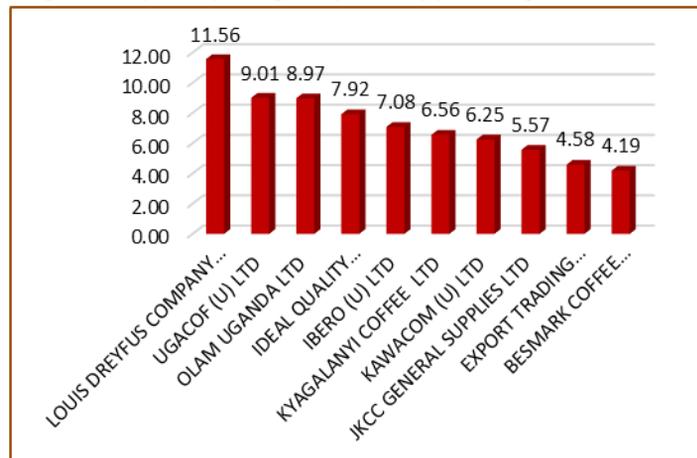
Coffee type	Quantity 60-Kilo Bags	%-age Quantity	Value in US \$	%-age Value	Unit Price US\$/Kilo
Total	401,336		65,939,868		2.74
Washed Robusta	363	0.11	62,356	0.12	2.86
Screen 18 Fairtrade Organic	382	0.11	55,324	0.10	2.41
Screen 18 Fairtrade	535	0.16	85,027	0.16	2.65
Screen 15 Fairtrade Organic	908	0.27	144,572	0.27	2.65
Screen 15 Fairtrade	1,257	0.37	192,470	0.36	2.55
Screen 14 Organic	360	0.11	50,953	0.10	2.36
Screen 14 Fairtrade	65	0.02	10,318	0.02	2.65
Screen 18	36,058	10.70	6,131,684	11.60	2.83
Screen 17	10,392	3.08	1,687,582	3.19	2.71
Screen 15	154,683	45.90	25,431,183	48.13	2.74
Screen 14	3,977	1.18	594,606	1.13	2.49
Screen 12	65,678	19.49	10,554,111	19.97	2.68
BHP 1199	32,292	9.58	3,853,368	7.29	1.99
Other Robustas	30,076	8.92	3,989,941	7.55	2.21
Total Robustas	337,026	100.00	52,843,493	100.00	2.61
Organic Bugisu	1,024	1.59	245,868	1.88	4.00
Sustainable Arabica	3,200	4.98	895,244	6.84	4.66
Org Wugar	320	0.50	80,424	0.61	4.19
Mt Elgon A+	3,000	4.66	682,593	5.21	3.79
Bugisu AA	8,899	13.84	1,940,650	14.82	3.63
Bugisu AB	7,563	11.76	1,605,471	12.26	3.54
Bugisu CPB	120	0.19	25,019	0.19	3.47
Bugisu C	320	0.50	81,249	0.62	4.23
Wugar	5,158	8.02	1,196,188	9.13	3.87
Drugar	27,877	43.35	5,492,153	41.94	3.28
Other Arabicas	6,829	10.62	851,516	6.50	2.08
Total Arabica	64,310	100.00	13,096,376	100.00	3.39

3. Individual Exporter Performance

Figure 2 shows the top 10 export companies' performance in the month of December 2023. Louis Dreyfus Company (U) Ltd had the highest market share of 11.56% compared to 10.49 % in November 2023. It was followed by Ugacof (U)Ltd 9.01% (7.09%); Olam Uganda Ltd 8.97% (8.11%); Ideal Quality Commodities Ltd 7.92% (9.25%), Ibero (U) Ltd 7.08% (8.92%); Kyagalanyi Coffee Ltd 6.56% (14.22%); Kawacom (U) Ltd 6.25% (4.24%); JKCC General Supplies Ltd 5.57% (2.90%), Export Trading Company (U) Ltd 4.58% (4.06%); and Besmark Coffee Company Limited 4.19% (5.28%) *The figures in brackets represent percentage market share held in November 2023.

The top 10 exporters held a market share of 72% lower than 76% the previous month reflecting reducing concentration at exporter level. Changes in positions compared to last month show competition at this level. Out of the 49 exporters who performed, 24 exported Robusta Coffee only while 7 exported Arabica coffee only. **Annex 2** shows a detailed list of exporters' performance in December 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 December 2023 are shown in **Fig 3** (details in **Annex 4**). Italy maintained the highest market share with 39.45% compared to 27.68% last month. It was followed by India 12.05% (7.59%), Germany 11.47% (20.50%), Morocco 6.12% (2.86%) and Spain 5.96% (5.53%). **The figures in brackets represent percentage market share held in November 2023.*

The first 10 major destinations of Uganda coffee took a market share of 92.25% compared to 86.72% last month. Coffee exports to Africa amounted to 56,253 bags, a market share of 14% compared to 69,2882 bags (16%) the previous month. African countries that imported Uganda coffee included Sudan, Morocco, Algeria, South Africa, Egypt, and Kenya. Europe remained the main destination for Uganda's coffees with a 67% imports share, slightly lower than 68% in November 2023.

Figure 3: Top ten export destinations by percentage market share

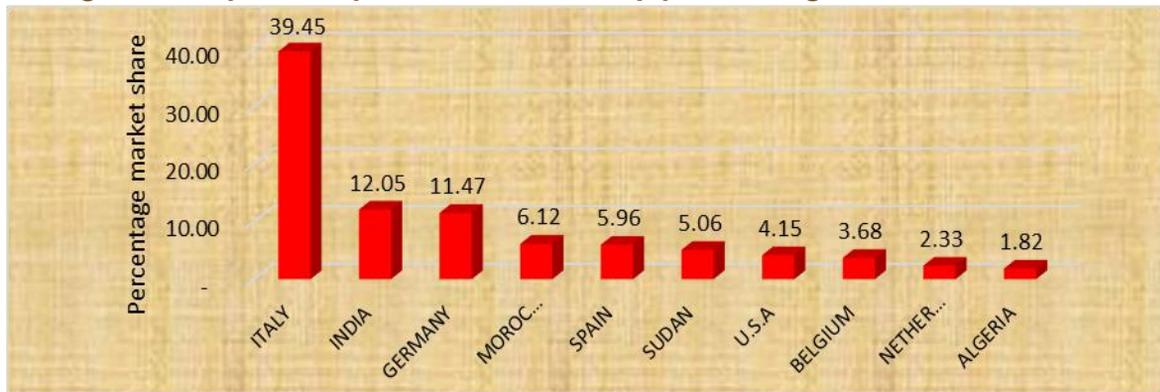


Figure 4: Percentage export share by continent

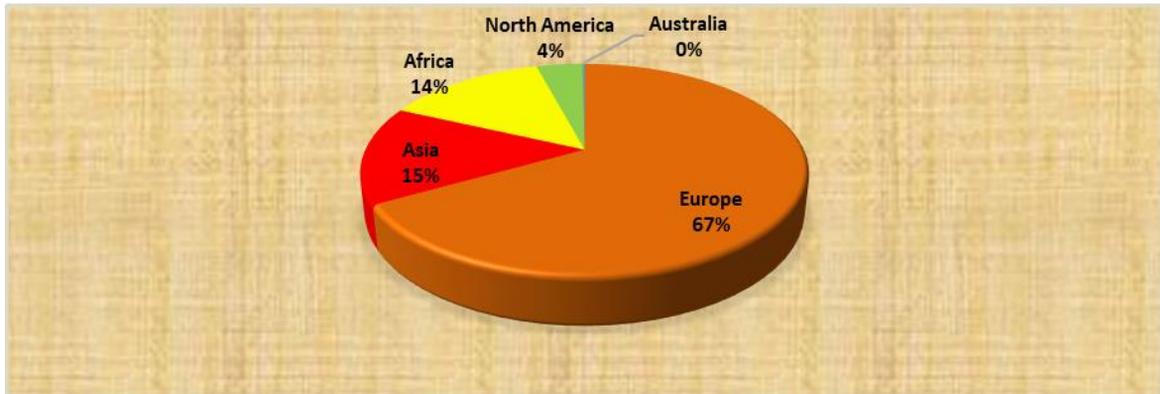
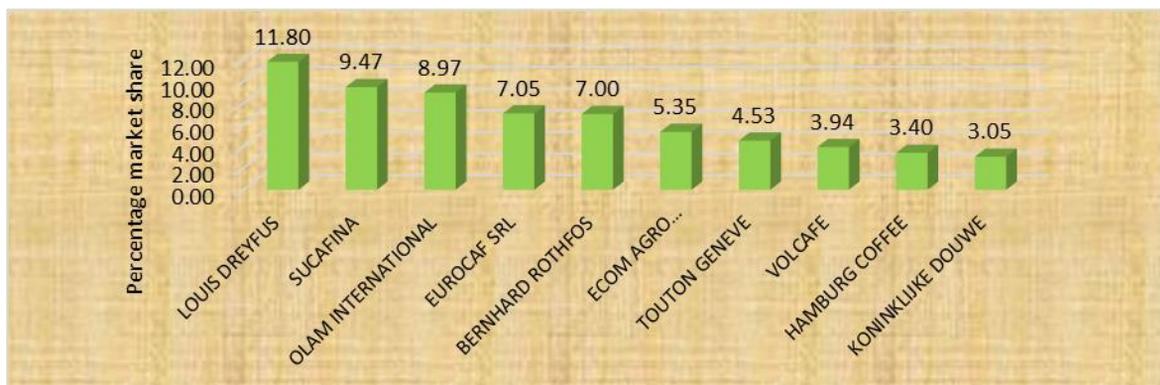


Figure 5: Top ten buyers by percentage market share



5. Foreign buyers of Uganda Coffee

Annex 4 shows a list of Ugandan coffee foreign buyers in December 2023. The top 10 buyers held a market share of 65% of total exports, lower than 62% the previous month. Louis Dreyfus led with a market share of 11.80% compared to 10.49% in November 2023. It was followed by Sucafina 9.47% (7.98%); Olam International 8.97% (8.11%); Eurocaf srl 7.05% (1.02%); Bernhard Rothfos 7.00% (9.62%) Ecom Agro Industrialist 5.35% (2.16%); Touton SA 4.53%; (1.92%) Volcafe 3.94% (5.24%) Hamburg Coffee 3.40% (17.76%); and Koninklijke Douwe 3.05% (1.17%) Note: *The figures in brackets represent percentage performance in the previous month –November 2023.*

Just like in previous months, there were changes in the relative positions of the first 10 major buyers reflecting continued demand for Uganda coffee abroad.

6. Global Situation

World coffee production for 2023/24 is forecast to reach 171.4 million bags, 6.9 million bags higher than the previous Year of 164.5 million bags, with higher output in Brazil, Colombia and Ethiopia expected to more than offset reduced production in Indonesia. Global exports are expected to increase by 8.4 million bags to 119.92 million bags, mainly due to strong shipments from Brazil. Global consumption is forecast at 169.5 million bags, with the largest increase in the European Union, the United States of America and Brazil. Ending inventories are expected to continue to tighten to a 12-year low of 26.5 million bags.. (United States Department of Agriculture, Coffee: World Markets and Trade report-December 2023).

7. Local Situation

During the month of December 2023, farm gate prices ranged from Sh.3,800-4,300/= per kilo of Kiboko (Robusta dry cherries); Shs. 8,500-9,000/= for FAQ (Fair Average Quality); Sh. 10,000- 10,500/= for Arabica parchment; and Sh. 9,000-9,500/= per kilo for Drugar from Kasese. Compared to the previous month, Robusta Kiboko averaged UGX 4,050 per kilo, higher than UGX 3,750 per kilo, FAQ UGX 8,750 per kilo higher than UGX 8,000, Arabica parchment UGX 10,250 per kilo higher than 9,250 per kilo and Drugar UGX 9,250/= per kilo higher than 8,500/= per kilo.

8. Coffee Consumption and Promotional Activities.

During the month, Uganda Coffee Development Authority promoted domestic coffee consumption at 5 events namely:

The East African Magistrates and Judges' Association conference that was held at Munyonyo Common Wealth Resort Kampala Uganda; the National organic exhibition that was held under the theme "increasing demand and supply of organic in the coffee sub sector in Uganda" and the source of the Nile women in Agri-business expo and investment summit under the theme "unlocking investment opportunities for women farmers"

UCDA conducted promotion for domestic coffee consumption in Kyenjojo and Nwoya districts under "coffee on the road" campaign to demonstrate the coffee value chain while providing coffee for tasting. Over 5000 cups of coffee were brewed using different brewing techniques for demonstration purposes and coffee was provided for tasting. People appreciated the great taste of Ugandan coffee. Information on coffee trade, investment opportunities in the sector, coffee types, grades, and benefits of taking coffee was provided to the attendees.

9. Coffee Development Activities

In December 2023, Uganda Coffee Development Authority dedicated significant efforts to advance coffee production and coordination. A total of 81 demonstrations were held, encompassing 51 for Good Agricultural Practices (GAPs) and 15 for rehabilitation and renovation (R&R). Additionally, 110 nurseries underwent inspection, including Coffee Wilt Disease resistant (CWDr) nurseries, Arabica, and Elite Robusta nurseries. The mother gardens, and seed gardens were also inspected, ensuring adherence to certification standards.

The initiative provided comprehensive technical support on soil fertility management to 236 farmers across all coffee-growing regions. Fertility management issues such as low carbon, phosphorus, CEC, and organic matter deficiency were addressed. The field teams supervised and guided coffee stumping of 91,368 old and unproductive coffee trees with the objective to enhance productivity in these regions. Capacity building efforts targeted 2,716 farmers through 109 training sessions, covering vital topics like coffee rehabilitation, fertilizer use, soil and water conservation, and pest control. Individual advisory services reached 1,230 coffee farmers through 249 farm visits. The team conducted 23 radio talk shows, disseminating crucial information on agricultural practices, post-harvest handling, and coffee quality management. Simultaneously, the pilot phase of the geospatial Monitoring and Evaluation (M&E) system continued and a total of 535 farmers and various value chain actors were registered across the eight coffee regions.

To address climate change impacts, 10 sustainable land management (SLM) trainings were conducted, reaching 561 farmers and providing guidance on soil and water conservation practices. On the other hand, inspection activities covered 216 coffee factories, 155 stores, and 3 roasters, resulting in necessary actions against 52 facilities for malpractices. Registration efforts targeted 167 hullers, 182 stores, 11 roasters, 7 wet mills, and 93 traders across different regions. In support to promote value addition, 75 wet processing equipment, including wet mills and pulpers, were distributed to cooperatives, dioceses, companies, farmer groups, and farms. Collaborations included participation in events such as the Women in Agribusiness Expo and the Kisoboka Agricultural Expo, engaging various stakeholders.

Key challenges during December 2023, included pest and disease incidents like the Black Coffee Twig Borer, red blister disease, Coffee Wilt Disease, and Coffee Leaf Rust, were identified and addressed.

9. Outlook for January 2024

Coffee exports are projected to be 450,000 bags. Harvesting of the main crop north of the equator and the fly crop in South western and Greater Masaka is tailing off.

Annex 1: Comparative Coffee Export Performance – 60-kilo bags; US\$

Coffee Year	2022/23		2023/24		%age Change	
	Quantity	Value \$	Quantity	Value \$	Quantity	Value \$
Grand Total	1,320,811	190,467,292	1,297,875	215,675,374	-1.74	13.23
Total Robusta	1,092,869	138,946,529	1,086,721	172,977,196	-0.56	24.49
Total Arabica	227,942	51,520,764	211,154	42,698,179	-7.37	-17.12
December	418,799	59,534,172	401,336	65,939,868	-4.17	10.76
Robusta	331,446	40,547,821	337,026	52,843,493	1.68	30.32
Arabica	87,353	18,986,350	64,310	13,096,376	-26.38	-31.02
November	447,162	64,195,442	426,839	70,851,099	-4.54	10.37
Robusta	364,875	45,435,243	339,642	53,276,542	-6.92	17.26
Arabica	82,287	18,760,200	87,197	17,574,557	5.97	-6.32
October	454,850	66,737,678	469,700	78,884,407	3.26	18.20
Robusta	396,548	52,963,465	410,053	66,857,161	3.41	26.23
Arabica	58,302	13,774,214	59,647	12,027,246	2.31	-12.68

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

EXPORTING COMPANY	POSITION HELD IN NOVEMBER	QUANTITY (Bags)			PERCENTAGE MARKET SHARE	
		Robusta	Arabica	Total	Individual	Cumulative
Total		337,026	64,310	401,336	100	
1 Louis Dreyfus Company (U) Ltd	2	45,289	1,120	46,409	11.56	11.56
2 Ugacof (U) Ltd	6	33,690	2,461	36,151	9.01	20.57
3 Olam Uganda Ltd	5	32,222	3,786	36,008	8.97	29.54
4 Ideal Quality Commodities Ltd	3	30,220	1,561	31,781	7.92	37.46
5 Ibero (U) Ltd	4	25,517	2,880	28,397	7.08	44.54
6 Kyagalanyi Coffee Ltd	1	14,760	11,570	26,330	6.56	51.10
7 Kawacom (U) Ltd	8	16,975	8,105	25,080	6.25	57.35
8 JKCC General Supplies Ltd	11	22,340		22,340	5.57	62.91
9 Export Trading Company (U) Ltd	10	18,368		18,368	4.58	67.49
10 Besmark Coffee Company Limited	7	4,181	12,644	16,825	4.19	71.68
11 Touton Uganda Limited	15	9,364	4,390	13,754	3.43	75.11
12 Sena Indo Uganda Limited	12	8,860	4,260	13,120	3.27	78.38
13 DRK General Merchants Ltd	33	8,528		8,528	2.12	80.50
14 Commodity Solutions (U) Ltd	14	6,596		6,596	1.64	82.15
15 Sukuma Commodities Limited	16	6,424		6,424	1.60	83.75
16 Grainpulse Ltd	24	5,508	320	5,828	1.45	85.20
17 Jber Coffee Ltd	9	5,604	193	5,797	1.44	86.64
18 Coffee World Ltd	25	4,294		4,294	1.07	87.71
19 Zigoti Coffee Works Ltd	20	3,282	688	3,970	0.99	88.70
20 Ankole Coffee Producers Coop Union Ltd	13	3,837		3,837	0.96	89.66
21 Family Bakery Ltd	32	3,646		3,646	0.91	90.57
22 Rezlex Investment Ltd	21	2,684	668	3,352	0.84	91.40
23 Xag Coffee Exporters	35	3,164		3,164	0.79	92.19
24 Drogo Commodities Limited	22	3,000		3,000	0.75	92.94
25 Robust Commodities Uganda Limited		2,700		2,700	0.67	93.61
26 Discovery Trading Limited	26	2,560		2,560	0.64	94.25
27 Agri Evolve	17		2,530	2,530	0.63	94.88

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Exporting Company	POSITION HELD IN NOVEMBER	QUANTITY (Bags)		Percentage Market Share		
		Robusta	Arabica	Total	Individual	Cumulative
28 Gisha Coffee Ltd	27	1,336	974	2,310	0.58	95.46
29 Noble Commodities (U) Ltd	18	1,336	640	1,976	0.49	95.95
30 Central Coffee Farmers Association		1,750		1,750	0.44	96.38
31 Nakana Coffee Factory Ltd	29	1,670		1,670	0.42	96.80
32 Darley Investments Ltd	44	1,656		1,656	0.41	97.21
33 Bakwanye Trading Co. Ltd	28		1,600	1,600	0.40	97.61
34 Ishaka Quality Commodities Ltd		1,600		1,600	0.40	98.01
35 Rubanga Cooperative Society Ltd	39	334	720	1,054	0.26	98.27
36 Funzo Coffee (U) Ltd		350	640	990	0.25	98.52
37 Busingye and Company Ltd		668		668	0.17	98.69
38 Bugisu Coop Union Ltd	38		640	640	0.16	98.85
39 Mbale Importers & Exporters Ltd	45		640	640	0.16	99.01
40 Bufumbo Organic Farmers Association	40		640	640	0.16	99.16
41 Uganda Tea Corporation Ltd		635		635	0.16	99.32
42 Intouch Trading Ltd		600		600	0.15	99.47
43 Mwanyi Terimba Ltd		350		350	0.09	99.56
44 Kaweri Coffee Plantation	30	350		350	0.09	99.65
Seth & Cushman Market Traders 45 Limited		344		344	0.09	99.73
46 Kwezi Coffee Limited		334		334	0.08	99.82
47 Bukonzo Joint Co-operative Union Ltd	31		320	320	0.08	99.90
Bukonzo Organic Farmers Cooperative 48 Union	41		320	320	0.08	99.98
49 Bariguna Coffee Ltd		100		100	0.02	100.00

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

DESTINATION	POSITION HELD IN NOVEMBER	QUANTITY (60kg bags)			%AGE MARKET SHARE	
		Robusta	Arabica	Total	Individual	Cumulative
Total		337,026	64,310	401,336	100	
1 Italy	1	145,587	12,739	158,326	39.45	39.45
2 India	4	45,847	2,520	48,367	12.05	51.50
3 Germany	2	33,063	12,957	46,020	11.47	62.97
4 Morocco	8	23,264	1,280	24,544	6.12	69.08
5 Spain	5	22,257	1,647	23,904	5.96	75.04
6 Sudan	3	20,318		20,318	5.06	80.10
7 U.S.A	9	3,744	12,895	16,639	4.15	84.25
8 Belgium	6	5,932	8,820	14,752	3.68	87.92
9 Netherlands	11	7,660	1,680	9,340	2.33	90.25
10 Algeria	7	7,298		7,298	1.82	92.07
11 United Arab Emirates	14	3,550	640	4,190	1.04	93.11
12 Switzerland	12	3,840		3,840	0.96	94.07
13 United Kingdom	17	1,730	1,332	3,062	0.76	94.83
14 Portugal	16	2,740	320	3,060	0.76	95.60
15 Japan	13	1,293	1,190	2,483	0.62	96.21
16 Russia	10	1,974	320	2,294	0.57	96.79
17 Vietnam	19	2,240		2,240	0.56	97.34
18 China	20		1,637	1,637	0.41	97.75
19 Israel	23	1,600		1,600	0.40	98.15
20 Slovenia		1,080		1,080	0.27	98.42
21 Canada	25	345	640	985	0.25	98.67
22 Egypt	15	350	334	684	0.17	98.84
23 Australia	27	320	320	640	0.16	99.00
24 Malaysia			640	640	0.16	99.15
25 South Korea	21	320	320	640	0.16	99.31
26 Kenya	37		606	606	0.15	99.47
27 Finland			320	320	0.08	99.54

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

Destination	POSITION HELD IN NOVEMBER	QUANTITY (60kg Bags)			%Age Market Share	
		Robusta	Arabica	Total	Individual	Cumulative
28 Greece	24		320	320	0.08	99.62
29 Poland	18	320		320	0.08	99.70
30 Singapore			320	320	0.08	99.78
31 South Africa	35		320	320	0.08	99.86
32 Turkey	36	320		320	0.08	99.94
33 Saudi Arabia		34	193	227	0.06	100.00

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

	BUYERS	POSITION HELD IN NOVEMBER	QUANTITY		%AGE MARKET SHARE		
			(60kg BAGS)		Total	Individual	Cumulative
			Robusta	Arabica			
	Total		337,026	64,310	401,336	100	
1	Louis Dreyfus	1	45,609	1,760	47,369	11.80	11.80
2	Sucafina	4	33,317	4,701	38,018	9.47	21.28
3	Olam International	3	32,222	3,786	36,008	8.97	30.25
4	Eurocaf Srl	20	28,306		28,306	7.05	37.30
5	Bernhard Rothfos	2	25,197	2,880	28,077	7.00	44.30
6	Ecom Agro Industrialist	12	14,416	7,053	21,469	5.35	49.65
7	Touton SA	14	10,004	8,180	18,184	4.53	54.18
8	Volcafe	6	9,550	6,261	15,811	3.94	58.12
9	Hamburg Coffee	8	7,844	5,821	13,665	3.40	61.52
10	Koninklijke Douwe	17	12,240		12,240	3.05	64.57
11	Icona Café	15	9,297	320	9,617	2.40	66.97
12	Pacorini Silocaf	23	7,098	668	7,766	1.94	68.90
13	ETC Trading	24	7,480		7,480	1.86	70.77
14	Altasheel Import & Export	10	7,000		7,000	1.74	72.51
15	GRB	5	1,080	4,246	5,326	1.33	73.84
16	Ngon Coffee		5,230		5,230	1.30	75.14
17	Bercher Coffee Consulting	7		5,100	5,100	1.27	76.41
18	Hafco Trading	9	4,900		4,900	1.22	77.63
19	DRK General		4,534		4,534	1.13	78.76
20	Strauss	13	3,425	1,063	4,488	1.12	79.88
21	Sri Narasus	21	4,250		4,250	1.06	80.94
22	CCL Products	18	3,850		3,850	0.96	81.90
23	Bijdendijk	29	2,338	720	3,058	0.76	82.66
24	Terracore		2,992		2,992	0.75	83.41
25	Pergamino		2,254	660	2,914	0.73	84.13
26	Coffein Compagnie	28	2,520		2,520	0.63	84.76
27	Walter Matter		1,600	640	2,240	0.56	85.32
28	Ibericafe Import S.L	22	1,972		1,972	0.49	85.81
29	Nordelut		1,920		1,920	0.48	86.29
30	Others		44,581	10,451	55,032	13.71	100.00