



Key Highlights



A total of 469,951-kilo bags of coffee valued at US\$ 48.19 million were exported in January 2020 at an average weighted price of US\$ 1.71 /kilo, 10 cents higher than US\$ 1.61 /kilo in December 2019.



Coffee exports for the coffee year 2019/20 (October to January 2020) totalled to 1,617,582 bags worth US 159 million compared to 1,464,026 bags (US\$ 147 million) of 2018/19.



Farm-gate prices for Robusta Kiboko averaged UGX **2,150** per kilo; FAQ UGX **4,300** per kilo, Arabica parchment UGX **5,500** per kilo and Drugar UGX **5,200** per kilo.



78.47% of the total volume was exported by 10 exporters, out of 37 companies which performed during the month compared to 78.85% in December 2019.



The ICO Composite Indicator price decreased by 8.9% to 106.89 US cents/lb in January 2020 from US cents/lb 117.37 in December 2019.

1. Coffee exports

Coffee exports in January 2020 amounted to 469,951-kilo bags worth US\$ 48.19 million as shown in Fig 1. This comprised 377,182 bags (US \$ 34.51 million) of Robusta and 92,769 bags (US\$ 13.68 million) of Arabica (see Table 1 and Annex1). This was an increase in both quantity and value of 18.99% and 22.93% respectively from the same month the previous year.

By comparing quantity of coffee exported by type in the same month of last coffee year (January 2019 and 2020), Robusta registered a percentage increase both in quantity and value (15.81% and of 15.26%) respectively. Similarly, Arabica exports registered a percentage increase in both quantity and in value (33.98% and 47.74%) respectively.

The coffee exports compared to the previous year were on account of increased procurement as a result of favourable weather in 2019 and the newly planted coffee trees which started yielding. The export value would have been higher if the global prices had not corrected downwards in January 2020.

Coffee exports for the first seven months (Financial year 2019/20) amounted to 2,932,364 60-kilo bags worth US\$ 285.4 million compared to 2,505,392 60-kilo bags worth US\$ 254.11 million the previous year. These represent 17.04% and 12.31% increase in both quantity and value respectively.

Fig 1: Trend of Total Quantity and Value of Coffee exported: February 2019- January 2020

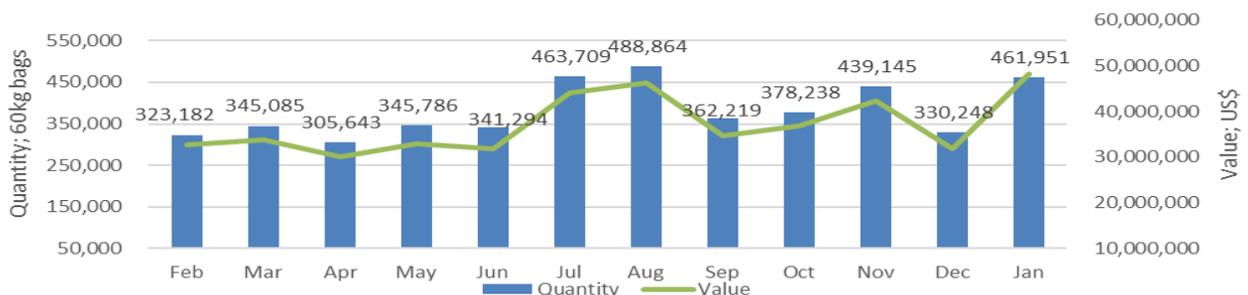


Table1: Comparison of Coffee Exports of January 2018/19 and 2019/20 Coffee Years

Period/Coffee Type	2019/20		2018/19		%age Change	
	Qty(60-kgbag)	Value (US \$)	Qty(60-kgbag)	Value (US \$)	Qty(60-kgbag)	Value (US \$)
January Total	469,951	48,186,327	394,937	39,197,834	↑ 18.99	↑ 22.93
Robusta	377,182	34,505,452	325,694	29,937,435	↑ 15.81	↑ 15.26
Arabica	92,769	13,680,875	69,243	9,260,399	↑ 33.98	↑ 47.74

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 January 2020. The average export price was US\$ 1.71 per kilo, 10 cents higher than US\$ 1.61 per kilo realized last month. Robusta exports accounted for 80.26% of total exports compared to 84.97% in December 2019. The average Robusta price was US\$ 1.52 per kilo, US cents 4 higher than the previous month. Screen 15 (Fairtrade) fetched the highest price of US\$ 2.23 per kilo, a premium of 56 cents over conventional Screen 18 sold at an average of US\$ 1.67 per kilo. Organic Robusta fetched US\$ 2.20 per kilo, a premium of 53 cents over conventional Screen 18.

Arabica fetched an average price of US\$ 2.46 per kilo, 15 cents higher than in December 2019. The highest price was for Sipi Falls(Org/RFA/Fairtrade) sold at US\$ 4.40 per kilo, a premium price of US \$ 1.66 over Bugisu AA sold at US\$ 2.74 per kilo. It was followed by Organic Okoro sold at a unit price of US\$ 3.15 per kilo, a premium of 56 cents over conventional Wugar. Drugar exports had a 46% share of Arabica exports compared to 42% the previous month.

Table 2: Coffee Exports by Type, Grade & Unit Price in January 2020

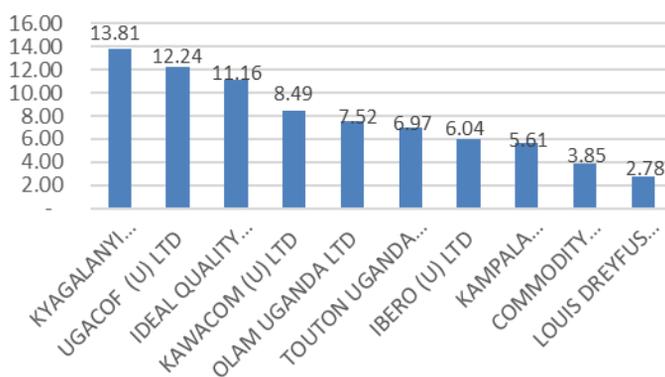
Coffee type	Quantity 60-Kilo Bags	%-age Quantity	Value in US \$	%-age Value	Unit Price US\$/Kilo
TOTAL	469,951		48,186,327		1.71
Organic Robusta	960	0.25	126,723	0.37	2.20
Washed Robusta	3,537	0.94	436,366	1.26	2.06
Screen 15 Fair Trade	360	0.10	48,096	0.14	2.23
Screen 18	38,462	10.20	3,863,470	11.20	1.67
Screen 17	21,034	5.58	2,304,929	6.68	1.83
Screen 15	202,126	53.59	18,548,619	53.76	1.53
Screen 14	2,658	0.70	218,939	0.63	1.37
Screen 12	64,890	17.20	5,750,552	16.67	1.48
BHP 1199	16,480	4.37	1,143,002	3.31	1.16
Other Robustas	26,675	7.07	2,064,756	5.98	1.29
Total Robusta	377,182	100.00	34,505,452	100.00	1.52
Sipi Falls(Org/RFA/Fairtrade)	5,960	1.27	1,574,672	11.51	4.40
Org Okoro	1,350	0.29	255,121	1.86	3.15
Org Bugisu	4,380	0.93	803,779	5.88	3.06
Mt Elgon A+	7,927	1.69	1,184,995	8.66	2.49
Bugisu A+	3,160	0.67	463,971	3.39	2.45
Bugisu AA	7,261	1.55	1,194,481	8.73	2.74
Bugisu AB	4,114	0.88	609,201	4.45	2.47
Bugisu PB	4	0.00	476	0.00	1.98
Wugar	12,920	2.75	2,008,287	14.68	2.59
Drugar	42,928	9.13	5,373,609	39.28	2.09
Other Arabicas	2,765	0.59	212,283	1.55	1.28
Total Arabica	92,769	19.74	13,680,875	100.00	2.46

3. Individual Exporter Performance

Figure 2 shows the top 10 export companies in the month of January 2020. Kyagalanyi Coffee Ltd led with a market share of 13.81% compared to 12.90% last month. It was followed by Ugacof (U) Ltd 12.24% (16.77%); Ideal Quality Commodities Ltd 11.16% (9.19%); Kawacom (U) Ltd 8.49% (6.61%); Olam Uganda Ltd 7.52% (8.77%); Touton (U) Ltd 6.97% (4.10%); Ibero (U) Ltd 6.04% (9.13%).

The top 10 exporters held a market share of 78.47% compared to 78.85% the previous month. There were minor changes in positions compared to last month reflecting efficiency of major exporters. Out of the 37 exporters that performed, 15 exported Robusta Coffee only while 6 exported Arabica coffee only. Annex 2 shows a detailed list of exporters performance in January 2020. *The figures in brackets represent percentage market share held in December 2019.

Figure 2: Top 10 Exporting Companies by percentage market share



4. Local Situation

During the month of January 2020, Farm gate prices ranged from Sh.2,000 -2,300 per kilo of Kiboko (Robusta dry cherries); Shs. 4,200-4,400/= for FAQ; Sh. 5,300-5,700/= for Arabica parchment; and Sh. 5,000-5,400/= per kilo for Drugar from Kasese. Robusta Kiboko averaged UGX 2,150 per kilo; FAQ UGX 4,300 per kilo, Arabica parchment UGX 5,500 per kilo and Drugar UGX 5,200 per kilo.

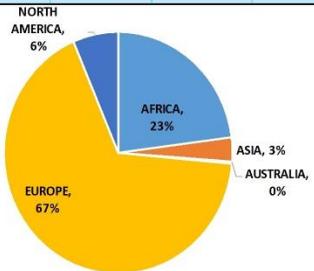
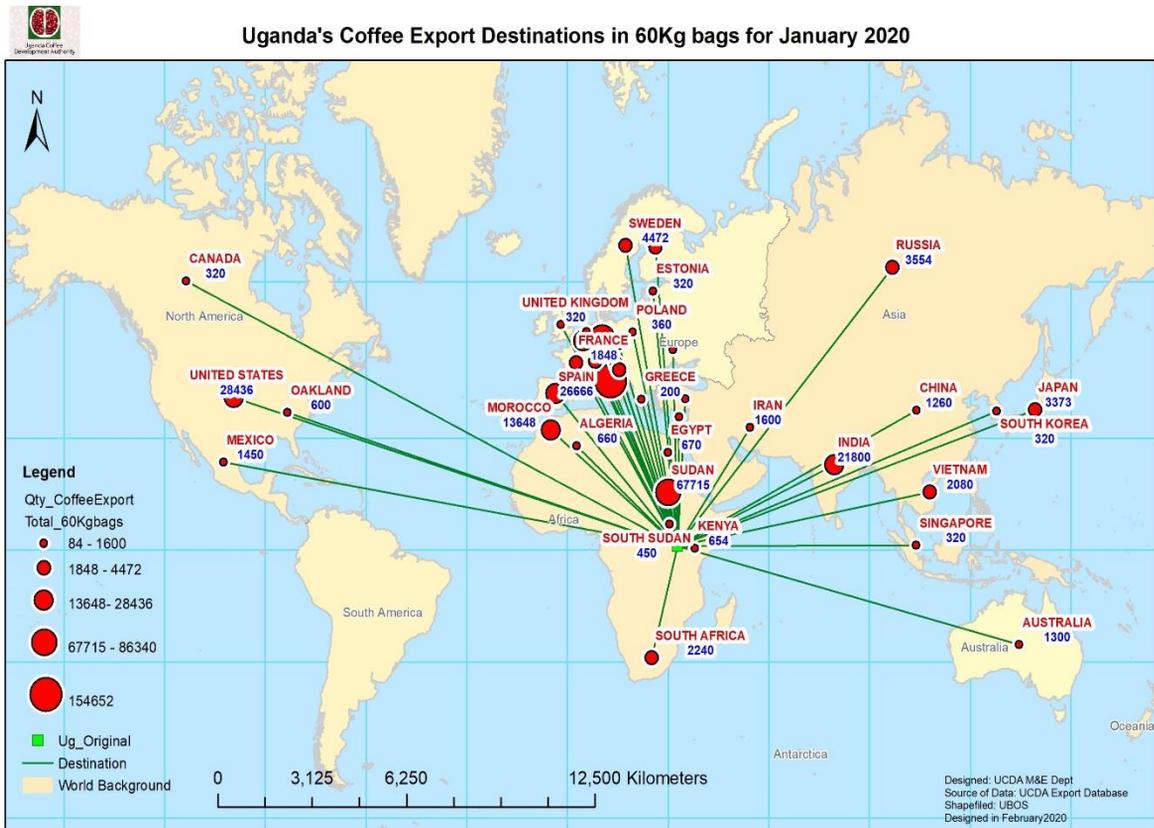
5. Global Situation

World coffee exports amounted to 10.3 million bags in December 2019, compared with 10.27 million in December 2018. Exports in the first 3 months of coffee year 2019/20 (Oct/19 to Sept/20) have decreased by 5.8% to 29.01 million bags compared to 30.78 million bags in the same period in 2018/19. In the twelve months ending December 2019, exports of Arabica totalled 82.75 million bags compared to 77.67 million bags last year; whereas Robusta exports amounted to 47.08 million bags compared to 45.07 million bags. *The ICO Composite Indicator price decreased by 8.9% to 106.89 US cents/lb in January 2020 from US cents/lb 117.37 in December 2019.*

6. Coffee Exports By Destination

The destinations of Uganda's coffee exports during the month of January 2020 are shown in Fig 3 (details in Annex 3). Exports to Italy had the highest market share with 32.91% compared to 36.44% the previous month. It was followed by Germany 18.37% (16.50%), Sudan 14.41% (7.65%); United States 6.05% (3.80%) and. Coffee exports to Africa amounted to 107,837 bags, a market share of 22.95% compared to 47,048 bags (14.25%) the previous month. Europe remains the main destination for Uganda's coffees with a 67.14% imports share **The figures in brackets represent percentage market share held in December 2019.*

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7. Foreign buyers of Uganda Coffee

Annex 4 shows a list of Ugandan coffee buyers in January 2020. The top 10 buyers held a market share of 68.54% of total exports, lower than 70.79% the previous month. Sucafina led with a market share of 11.51% compared to 16.16% in December 2019. It was followed by Olam International 11.28% (10.7%); Altasheel 9.16% (5.72%); Volcafe 8.01% (9.93%); Ecom Agro Industrial 7.27% (5.44%); Bernhard Rothfos 6.16% (9.41%); Coex Coffee International 5.17% (4.35%), Changes in relative position compared to the previous month reflect competition for Uganda coffee among foreign buyers.

Note: The figures in brackets represent percentage performance in the previous month –December 2019.

7. Outlook For February

Coffee exports are projected to be 470,000 bags as the main harvest season in Central and Busoga regions is at its tail end the low global prices notwithstanding. Coffee exporters will be forced to release their stocks in anticipation of a higher Brazilian 2020/21 crop harvest to start in April that will impact on prices negatively.

Table 3: Summary For Fertilizer Allocation

Region	No. Cooperatives Requested	No. Cooperatives Responded	No. of Bags of Fertilizer requested	No. of Bags of Fertilizer allocated	No. of Bags of Fertilizer taken
Rwenzori	7	2	12,938	12,938	0
Central	3	2	3,152	3,152	3,122
Elgon	4	4	13,173	13,173	7,986
South Western	6	4	54,470	32,086	14,134
Eastern	1	1	592	592	592
Northern	1	1	2,783	2,783	600
TOTAL			87,108	64,724	26,434

8. Coffee Development and Promotional Activities

UCDA has started a focused approach on coffee rehabilitation and application of fertilizers. Coffee rehabilitation involves rejuvenating the old and unproductive trees through steps that enable trees revert to a young and vigorous stage and regain optimal production potential. Through coffee rehabilitation, the very old, un-productive or under-productive coffee trees can be rejuvenated. To get optimal benefits from rehabilitation, application of fertilizers gives the stump a big boost to sprout and produce a good crop in subsequent years. As a result, UCDA has rolled out a fertilizer program to all regions of Uganda.

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

Coffee Year	2019/20		2018/19		%age Change	
	Quantity	Value \$	Quantity	Value \$	Quantity	Value \$
Grand Total	1,617,582	159,151,096	1,464,026	147,700,465	10.49	7.75
Total Robusta	1,296,862	117,939,981	1,105,736	104,668,547	17.28	12.68
Total Arabica	320,720	41,211,115	358,290	43,031,918	-10.49	-4.23
January	469,951	48,186,327	394,937	39,197,834	18.99	22.93
Robusta	377,182	34,505,452	325,694	29,937,435	15.81	15.26
Arabica	92,769	13,680,875	69,243	9,260,399	33.98	47.74
December	330,248	31,868,091	314,437	32,295,410	5.03	-1.32
Robusta	280,603	24,990,250	243,160	23,206,944	15.40	7.68
Arabica	49,645	6,877,841	71,277	9,088,466	-30.35	-24.32
November	439,145	42,193,666	401,447	41,123,564	9.39	2.60
Robusta	336,006	30,376,941	291,540	28,108,844	15.25	8.07
Arabica	103,139	11,816,725	109,907	13,014,720	-6.16	-9.20
October	378,238	36,903,012	353,205	35,083,657	7.09	5.19
Robusta	303,071	28,067,338	245,342	23,415,324	23.53	19.87
Arabica	75,167	8,835,674	107,863	11,668,333	-30.31	-24.28

Annex 2: List of Coffee Exporters and their Market Share: January 2020

EXPORTING COMPANY	POSITION HELD IN DECEMBER	QUANTITY (Bags)			PERCENTAGE MARKET SHARE	
		Robusta	Arabica	Total	Individual	Cumulative
Total		377,182	92,769	469,951	100	
1 Kyagalanyi Coffee Ltd	2	42,347	22,574	64,921	13.81	13.81
2 Ugacof (U) Ltd	1	56,469	1,050	57,519	12.24	26.05
3 Ideal Quality Commodities Ltd	3	50,344	2,105	52,449	11.16	37.21
4 Kawacom (U) Ltd	6	20,036	19,874	39,910	8.49	45.71
5 Olam Uganda Ltd	5	28,851	6,468	35,319	7.52	53.22
6 Touton Uganda Limited	8	19,820	12,950	32,770	6.97	60.20
7 Ibero (U) Ltd	4	28,370		28,370	6.04	66.23
8 Kampala Domestic Store Ltd	14	26,350		26,350	5.61	71.84
9 Commodity Solutions (U) Ltd	10	16,160	1,934	18,094	3.85	75.69
10 Louis Dreyfus Company (U) Ltd	9	9,330	3,730	13,060	2.78	78.47
11 Besmark Coffee Company Limited	7	5,667	6,240	11,907	2.53	81.00
12 Coffee World Ltd	15	10,922		10,922	2.32	83.33
13 Grainpulse Ltd	11	7,804	2,050	9,854	2.10	85.42
14 The Edge Trading (U) Ltd	25	9,071	30	9,101	1.94	87.36
15 Ishaka Quality Commodities Ltd	20	8,244		8,244	1.75	89.11
16 Great Lakes Coffee Company Ltd	13		7,498	7,498	1.60	90.71
17 Nakana Coffee Factory Ltd	17	7,482		7,482	1.59	92.30
18 Mbale Importers & Exporters Ltd	18	4,463	2,389	6,852	1.46	93.76
19 Darley Investments Ltd	19	6,153	167	6,320	1.34	95.10
20 Bakhsons Trading Co. (U) Ltd	23	3,070	660	3,730	0.79	95.90
21 Ankole Coffee Producers Coop Union Ltd	22	3,148		3,148	0.67	96.57
22 Discovery Trading Limited	24	2,450		2,450	0.52	97.09
23 Tata Uganda Limited	21	2,400		2,400	0.51	97.60
24 Export Trading Company (U) Ltd	12	2,240		2,240	0.48	98.08
25 Kaweri Coffee Plantation		1,920		1,920	0.41	98.48
26 Sena Indo Uganda Limited	16	1,880		1,880	0.40	98.88
27 Kibinge Coffee Farmers' Coop Soc Ltd	27	680		680	0.14	99.03

Annex 2: List of Coffee Exporters and their Market Share: January 2020

Exporting Company	POSITION HELD IN DECEMBER	QUANTITY (Bags)			Percentage Market Share	
		Robusta	Arabica	Total	Individual	Cumulative
28 Tariq General Suppliers Ltd	26		675	675	0.14	99.17
29 Bugisu Coop Union Ltd			640	640	0.14	99.31
Bukonzo Organic Farmers Cooperative Union	32		640	640	0.14	99.45
31 Gisha Coffee Ltd		640		640	0.14	99.58
32 Zigoti Coffee Works Ltd	28	350		350	0.07	99.66
33 Equatorial Beans Factory Ltd		200	134	334	0.07	99.73
34 Friends Of Mothers Initiative Ltd		1	321	322	0.07	99.80
35 Bakwanye Trading Co. Ltd	29		320	320	0.07	99.86
36 Banyankole Kweterana Coop Union Ltd		320		320	0.07	99.93
37 Bukonzo Joint Co-operative Union Ltd	30		320	320	0.07	100.00

Annex 3: Main Destinations of Uganda Coffee by Type in January 2020						
Destination	Position Held in December	Quantity (60kg bags)			%Age Market Share	
		Robusta	Arabica	Total	Individual	Cumulative
Total		377,182	92,769	469,951	100.00	
1 Italy	1	135,348	19,304	154,652	32.91	32.91
2 Germany	2	54,861	31,479	86,340	18.37	51.28
3 Sudan	4	67,490	225	67,715	14.41	65.69
4 United States		7,555	20,881	28,436	6.05	71.74
5 Spain	8	23,062	3,604	26,666	5.67	77.41
6 Belgium	3	20,801	1,960	22,761	4.84	82.26
7 India	5	20,860	940	21,800	4.64	86.90
8 Morocco	6	13,648		13,648	2.90	89.80
9 Isreal	26	4,480	1,280	5,760	1.23	91.03
10 Sweden	11	2,404	2,068	4,472	0.95	91.98
11 Switzerland	10	4,133	330	4,463	0.95	92.93
12 Russia	21	3,100	454	3,554	0.76	93.68
13 Japan	13	2,773	600	3,373	0.72	94.40
14 Finland		1,920	960	2,880	0.61	95.01
15 Slovenia		2,310		2,310	0.49	95.51
16 South Africa	14	2,240		2,240	0.48	95.98
17 Vietnam		2,080		2,080	0.44	96.42
18 Croatia	22		1,920	1,920	0.41	96.83
19 France		1,528	320	1,848	0.39	97.23
22 Iran		1,600		1,600	0.34	97.57
21 Mexico	15		1,450	1,450	0.31	97.88
22 Australia	18		1,300	1,300	0.28	98.15
23 China	12	320	940	1,260	0.27	98.42
24 Ukraine	23	700		700	0.15	98.57
25 Netherlands	17	360	320	680	0.14	98.71
26 Egypt	19	670		670	0.14	98.86
27 Algeria		660		660	0.14	99.00

Annex 3: Main Destinations of Uganda Coffee by Type in January 2020.

DESTINATION	POSITION HELD IN DECEMBER	QUANTITY (60kg bags)			%AGE MARKET SHARE	
		Robusta	Arabica	Total	Individual	Cumulative
28 Turkey		660		660	0.14	99.14
29 Kenya	16	334	320	654	0.14	99.28
30 Oakland			600	600	0.13	99.40
31 South Sudan			450	450	0.10	99.50
32 Poland			360	360	0.08	99.58
33 Canada		320		320	0.07	99.64
34 Estonia		320		320	0.07	99.71
35 Singapore	24	320		320	0.07	99.78
36 South Korea			320	320	0.07	99.85
37 United Kingdom	9	320		320	0.07	99.92
38 Greece			200	200	0.04	99.96
39 Cyprus			105	105	0.02	99.98
40 Czech Republic		5	79	84	0.02	100.00

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Annex 4: List of Foreign Coffee Buyers during the Month of January 2020

BUYERS	POSITION HELD IN DECEMBER	QUANTITY (60kg BAGS)			%AGE MARKET SHARE	
		Robusta	Arabica	Total	Individual	Cumulative
Total		377,182	92,769	469,951	100.00	
1 Sucafina	1	53,056	1,050	54,106	11.51	11.51
2 Olam International	2	43,789	9,228	53,017	11.28	22.79
3 Altasheel Import & Export	5	43,050		43,050	9.16	31.96
4 Volcafe	3	26,382	11,274	37,656	8.01	39.97
5 Ecom Agro Industrialist	6	17,430	16,714	34,144	7.27	47.23
6 Bernhard Rothfos	4	28,940		28,940	6.16	53.39
7 Coex Coffee International	8	17,888	6,400	24,288	5.17	58.56
8 Aldwami Co	13	16,100		16,100	3.43	61.99
9 Hamburg Coffee	7	12,888	2,720	15,608	3.32	65.31
10 Icona Café	9	14,238	960	15,198	3.23	68.54
11 Strauss	17	8,275	4,150	12,425	2.64	71.18
12 Pacorini Silocaf	15	11,180	700	11,880	2.53	73.71
13 Louis Dreyfus		10,140	640	10,780	2.29	76.01
14 Koninklijke Douwe	14	7,920		7,920	1.69	77.69
15 Touton Geneve	12	334	7,000	7,334	1.56	79.25
16 Ger West Hollff	16		5,950	5,950	1.27	80.52
17 Bercher Coffee Consulting	10	5,568		5,568	1.18	81.70
18 Luigi Lavazza	27	5,520		5,520	1.17	82.88
19 Falcon Commodities	20		4,480	4,480	0.95	83.83
20 Grb			4,160	4,160	0.89	84.72
21 Sln Coffee Ltd		4,160		4,160	0.89	85.60
22 Jiva International		3,910		3,910	0.83	86.43
23 Cofftea		3,850		3,850	0.82	87.25
24 Ned Coffee B.V		3,619		3,619	0.77	88.02
25 Nkg Bero Italia	24	3,079		3,079	0.66	88.68
26 Schluter		3,030		3,030	0.64	89.32
27 Elmathahib		2,450		2,450	0.52	89.84
28 Tata Coffee	19	2,400		2,400	0.51	90.35
29 Guzman		1,320	990	2,310	0.49	90.85
30 Others		26,666	16,353	43,019	9.15	100.00

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