



Key Highlights

 A total of 472,994-kilo bags of coffee valued at US\$ 46.73 million were exported in February 2020 at an average weighted price of US\$ 1.65 /kilo, 6 cents lower than US\$ 1.71 /kilo in January 2020.



Coffee exports for the 12-months period (March 2019 to February 2020) totalled to 4,744,665 bags worth US 459.52 million compared to 4,235,164 bags (US\$ 435 million) the previous year .



Farm-gate prices for Robusta Kiboko averaged UGX **2,150** per kilo; FAQ UGX **4,000** per kilo, Arabica parchment UGX **5,750** per kilo and Drugar UGX **5,200** per kilo.



80.07% of the total volume was exported by 10 exporters, out of 36 companies which performed during the month compared to 78.47% in January 2020.



The ICO Composite Indicator price decreased by 4.6% to 102.00 US cents/lb in February 2020 from US cents/lb 106.89 in January.

1. Coffee exports

Coffee exports in February 2020 amounted to 472,994 60-kilo bags worth US\$ 46.73 million as shown in Fig 1. This comprised 388,646 bags (US \$ 34.63 million) of Robusta and 84,348 bags (US\$ 12.10 million) of Arabica (see Table 1 and Annex 1). This was an increase of 46.36% and 43.37% in quantity and value respectively from the same month the previous year.

By comparing quantity of coffee exported by type in the same month of last Coffee Year (February 2019 and 2020), Robusta registered a percentage increase both in quantity and value (48.61% and of 43.05%) respectively. Arabica exports also registered a percentage increase in both quantity and value (36.80% and 44.28%) respectively.

The increase in exports has been attributed to the increased production for the main season in Central and Eastern Regions and a fly crop from regions south of the equator on account of fruition of the newly planted coffee and the generally dry weather which facilitated drying of the coffee.

Coffee exports for the first 8 months (Financial Year 2019/20) amounted to 3,405,748-kilo bags worth US\$ 330.68 million compared to 2,830,600 60-kilo bags worth US\$ 286.42 million the previous year. This represents 20.32% and 15.45% increase in both quantity and value respectively. Cumulatively in twelve months, a total of 4.74 million 60-kg bags worth US\$ 459.52 million were exported (figure 1)..

Fig 1: Trend of Total Quantity and Value of Coffee Exported: March 2019- February 2020



Table1: Comparison of Coffee Exports of February 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 \$)
February Total	472,994	46,729,470	323,182	32,594,100	↑ 46.36	↑ 43.37
Robusta	388,646	34,631,182	261,526	24,209,036	↑ 48.61	↑ 43.05
Arabica	84,348	12,098,287	61,656	8,385,064	↑ 36.80	↑ 44.28

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 February 2020. The average export price was US\$ 1.65 per kilo, 6 cents lower than US\$ 1.71 per kilo realized last month. Robusta exports accounted for 82.17% of total exports compared to 80.26% in January 2020. The average Robusta price was US\$ 1.49 per kilo, US cents 3 lower than the previous month. Screen 15 (Fairtrade) fetched the highest price of US\$ 2.23 per kilo, a premium of 73 cents over conventional Screen 15 sold at an average of US\$ 1.50 per kilo. Organic Robusta fetched US\$ 2.20 per kilo, a premium of 59 cents over conventional Screen 18.

Arabica fetched an average price of US\$ 2.39 per kilo, 7 cents lower than in January. The highest price was for Sipi Falls sold at US\$ 4.65 per kilo, a premium price of US \$ 2.07 over Bugisu AA sold at US\$ 2.58 per kilo. It was followed by Organic Bugisu sold at a unit price of US\$ 3.14 per kilo, a premium of 56 cents over conventional Bugisu AA. Organic Wugar fetched US\$ 3.09 per kilo, 85 cents over conventional Wugar. Drugar exports had a 41% share of Arabica exports compared to 46% the previous month.

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

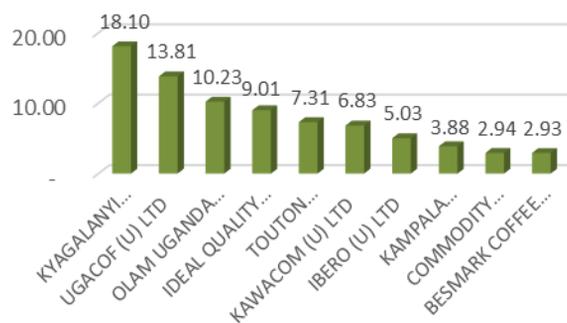
Coffee type	Quantity 60-Kilo Bags	%-age Quantity	Value in US \$	%-age Value	Unit Price US\$/Kilo
TOTAL	472,994		46,729,470		1.65
Org Robusta	2,390	0.61	280,208	0.81	1.95
Washed Robusta	1,294	0.33	158,385	0.46	2.04
Screen 15 Fair Trade	1,040	0.27	138,943	0.40	2.23
Screen 18	48,520	12.48	4,694,568	13.56	1.61
Screen 17	26,604	6.85	2,595,120	7.49	1.63
Screen 15	192,326	49.49	17,268,857	49.87	1.50
Screen 14	640	0.16	49,969	0.14	1.30
Screen 13	8,280	2.13	718,810	2.08	1.45
Screen 12	68,239	17.56	5,894,480	17.02	1.44
Bhp 1199	19,483	5.01	1,353,866	3.91	1.16
Other Robusta	19,830	5.10	1,477,977	4.27	1.24
Total Robusta	388,646	100.00	34,631,183	100.00	1.49
Organic Bugisu	2,360	2.80	444,018	3.67	3.14
Organic Wugar	320	0.38	59,260	0.49	3.09
Sipi Falls	5,800	6.88	1,618,778	13.38	4.65
Mt Elgon A+	8,000	9.48	1,260,319	10.42	2.63
Bugisu A+	2,800	3.32	411,114	3.40	2.45
Bugisu AA	3,750	4.45	580,574	4.80	2.58
Bugisu AB	3,868	4.59	581,994	4.81	2.51
Bugisu CPB	80	0.09	12,169	0.10	2.54
Bugisu PB	72	0.09	10,432	0.09	2.41
Wugar	10,820	12.83	1,451,901	12.00	2.24
Drugar	40,113	47.56	5,050,833	41.75	2.10
Other Arabica	6,365	7.55	616,896	5.10	1.62
Total Arabica	84,348	100.00	12,098,287	100.00	2.39

3. Individual Exporter Performance

Figure 2 shows the top 10 export companies in the month of February 2020. Kyagalanyi Coffee Ltd led with a market share of 18.10% compared to 13.81% last month. It was followed by Ugacof (U) Ltd 13.81% (12.24%); Olam Uganda Ltd 10.23% (7.52%); Ideal Quality Commodities (U) Ltd 9.01% (11.16%) Touton Uganda Limited 7.31% (6.97%) Kawacom (U) Ltd 6.83% (8.49%); and Ibero (U) Ltd 5.03% (6.04%).

The top 10 exporters held a market share of 80.07% compared to 78.47% the previous month. There were minor changes in positions compared to last month reflecting efficiency of major exporters. Out of the 36 exporters that performed, 15 exported Robusta Coffee only while 7 exported Arabica coffee only. Annex 2 shows a detailed list of exporters performance in February 2020.*The figures in brackets represent percentage market share held in January 2020.

Figure 2: Top 10 Exporting Companies by percentage market share



4. Local Situation

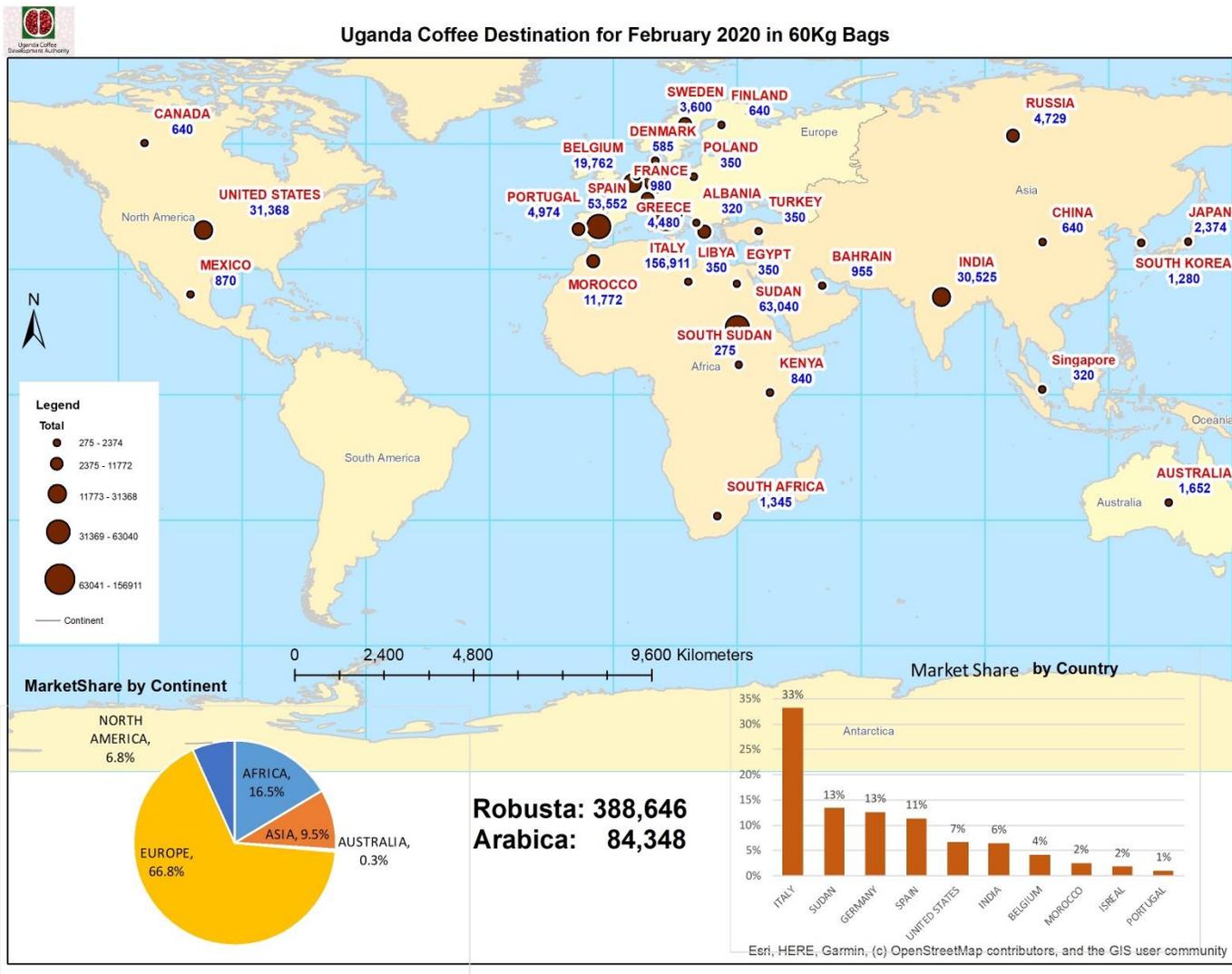
During the month of February 2020, farm gate prices ranged from Sh.2,000 -2,200 per kilo of Kiboko (Robusta dry cherries); Shs. 3,800-4,200/= for FAQ; Sh. 5,500-6,000/= for Arabica parchment; and Sh. 5,000-5,400/= per kilo for Drugar from Kasese. Robusta Kiboko averaged UGX 2,150 per kilo; FAQ UGX 4,000 per kilo, Arabica parchment UGX 5,750 per kilo and Drugar UGX 5,200 per kilo.

5. Global Situation

World coffee exports amounted to 10.29 million bags in January 2020, compared with 11.14 million in January 2019. Exports in the first 4 months of Coffee Year 2019/20 (Oct/19 to Jan/20) have decreased by 5.8% to 39.53 million bags compared to 41.95 million bags in the same period in 2018/19. The ICO Composite Indicator price decreased by 4.6% to 102.00 US cents/lb in February 2020 from US cents/lb 106.89 in January 2020.

6. Coffee Exports by Destination

The destinations of Uganda's coffee exports during the month of February 2020 are shown in Fig 3 (details in Annex 3). Exports to Italy had the highest market share with 33.17% (32.91%). It was followed by Sudan 13.33% (14.41%), Germany 12.59% (18.37%) and Spain 11.32% (5.67%). Coffee exports to Africa amounted to 77,972 bags, a market share of 16.5% compared to 107,837 bags (22.95%) the previous month. Europe remains the main destination for Uganda's coffees with a 66.8% imports share. *The figures in brackets represent percentage market share held in January 2020.



7. Foreign buyers of Uganda Coffee

Annex 4 shows a list of Ugandan coffee buyers in February 2020 2019. The top 10 buyers held a market share of 67.43% of total exports, lower than 68.54% the previous month. Sucafina led with a market share of 13.13% compared to 11.51% in January 2020. It was followed by Olam International 12.34% (11.28%); Volcafe 10.21% (8.01%); Altasheel Import & Export 7.77% (9.16%); Ecom Agro Industrial 5.56% (7.27%) Bernhar Rothfos 5.03% (6.16%); Coex Coffee International 4.19% (5.17%), Changes in relative position compared to the previous month reflect competition for Uganda coffee.

Note: *The figures in brackets represent percentage performance in the previous month –January 2020.*

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. As a result, UCDA has rolled out a fertilizer program to all regions of Uganda and a total of 100,631 bags have been allocated to 32 cooperatives. *Table 3*

9. Outlook for March 2020

Coffee exports are projected to be 430,000 bags as exporters will continue releasing stocks in anticipation of lower prices in April 2020 when Brazil’s on-year 2020/21 crop. The main harvest season in Central and Busoga regions has virtually ended. The spread of the Corona virus is likely to affect global demand of commodities including coffee and hence prices.

Table 3: Summary For Fertilizer Allocation

Region	No. Cooperatives allocated	No. of Bags of Fertilizer allocated	No. of Bags of Fertilizer taken
Central	8	18,095	18,235
Eastern	4	4,764	4,764
Elgon	3	13,173	12,773
Northern	1	2,783	2,783
Rwenzori	2	12,938	12,738
south west	9	40,771	40,571
Western	5	8,107	8,107
Grand Total	32	100,631	99,971

Note: Each bag contains 25kgs

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	2,090,956	205,740,948	1,787,208	180,294,565	17.00	14.11
Total Robusta	1,685,868	152,424,614	1,367,262	128,877,583	23.30	18.27
Total Arabica	405,088	53,316,333	419,946	51,416,982	-3.54	3.69
February	472,994	46,729,470	323,182	32,594,100	46.36	43.37
Robusta	388,646	34,631,182	261,526	24,209,036	48.61	43.05
Arabica	84,348	12,098,287	61,656	8,385,064	36.80	44.28
January	470,331	48,046,709	394,937	39,197,834	19.09	22.57
Robusta	377,542	34,358,903	325,694	29,937,435	15.92	14.77
Arabica	92,789	13,687,806	69,243	9,260,399	34.00	47.81
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: February 2020

EXPORTING COMPANY	POSITION HELD IN JANUARY	QUANTITY (Bags)			PERCENTAGE MARKET SHARE	
		Robusta	Arabica	Total	Individual	Cumulative
Total		388,646	84,348	472,994	100	
1 Kyagalanyi Coffee Ltd	1	50,165	35,425	85,590	18.10	18.10
2 Ugacof (U) Ltd	2	59,633	5,710	65,343	13.81	31.91
3 Olam Uganda Ltd	5	37,810	10,560	48,370	10.23	42.14
4 Ideal Quality Commodities Ltd	3	42,618		42,618	9.01	51.15
5 Touton Uganda Limited	6	33,890	700	34,590	7.31	58.46
6 Kawacom (U) Ltd	4	19,850	12,465	32,315	6.83	65.29
7 Ibero (U) Ltd	7	23,776		23,776	5.03	70.32
8 Kampala Domestic Store Ltd	8	18,356		18,356	3.88	74.20
9 Commodity Solutions (U) Ltd	9	13,257	660	13,917	2.94	77.14
10 Besmark Coffee Company Limited	11	9,667	4,200	13,867	2.93	80.07
11 Grainpulse Ltd	13	9,538	1,410	10,948	2.31	82.39
12 Louis Dreyfus Company (U) Ltd	10	7,840	960	8,800	1.86	84.25
13 Coffee World Ltd	12	7,960		7,960	1.68	85.93
14 Nakana Coffee Factory Ltd	17	7,688		7,688	1.63	87.56
15 Darley Investments Ltd	19	6,664		6,664	1.41	88.97
16 Sena Indo Uganda Limited	26	5,940		5,940	1.26	90.22
17 Export Trading Company (U) Ltd	24	5,160	640	5,800	1.23	91.45
18 Ishaka Quality Commodities Ltd	15	5,790		5,790	1.22	92.67
19 Bakhsons Trading Co. (U) Ltd	20	4,170	1,400	5,570	1.18	93.85
20 Great Lakes Coffee Company Ltd	16		5,308	5,308	1.12	94.97
21 The Edge Trading (U) Ltd	14	4,518	350	4,868	1.03	96.00
22 Mbale Importers & Exporters Ltd	18	3,450	555	4,005	0.85	96.85
23 Tata Uganda Limited	23	3,000		3,000	0.63	97.48
24 Ankole Coffee Producers Coop Union Ltd	21	2,736		2,736	0.58	98.06
25 Qualicoff (U) Limited		1,400		1,400	0.30	98.36
26 Tariq General Suppliers Ltd	28		1,100	1,100	0.23	98.59
27 Bakwanye Trading Co. Ltd	35		1,000	1,000	0.21	98.80

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

Exporting Company	POSITION HELD IN JANUARY	QUANTITY (Bags)			Percentage Market Share	
		Robusta	Arabica	Total	Individual	Cumulative
28 Kaweri Coffee Plantation	25	960		960	0.20	99.00
29 Shiba World Investments Ltd			755	755	0.16	99.16
30 Rezlex Investment Ltd		720		720	0.15	99.32
31 Discovery Trading Limited	22	660		660	0.14	99.45
32 Klu (U) Ltd		660		660	0.14	99.59
Bukonzo Joint Co-operative Union						
33 Ltd	30		640	640	0.14	99.73
34 Gisha Coffee Ltd	31	360	200	560	0.12	99.85
35 Nucafe		410		410	0.09	99.93
Gorilla Summit Coffee						
36 Development			310	310	0.07	100.00

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

DESTINATION	POSITION HELD IN JANUARY	QUANTITY (60kg bags)			%AGE MARKET SHARE	
		Robusta	Arabica	Total	Individual	Cumulative
Total		388,646	84,348	472,994	100.00	
1 Italy	1	140,991	15,920	156,911	33.17	33.17
2 Sudan	3	62,270	770	63,040	13.33	46.50
3 Germany	2	37,962	21,598	59,560	12.59	59.09
4 Spain	5	51,612	1,940	53,552	11.32	70.42
5 United States	4	9,228	22,140	31,368	6.63	77.05
6 India	7	26,785	3,740	30,525	6.45	83.50
7 Belgium	6	17,882	1,880	19,762	4.18	87.68
8 Morocco	8	11,772		11,772	2.49	90.17
9 Isreal	9	7,040	1,300	8,340	1.76	91.93
10 Portugal		4,974		4,974	1.05	92.98
11 Russia	12	3,894	835	4,729	1.00	93.98
12 Greece	38	1,600	2,880	4,480	0.95	94.93
13 Sweden	10	1,440	2,160	3,600	0.76	95.69
14 Switzerland	11	720	2,800	3,520	0.74	96.44
15 Japan	13	2,174	200	2,374	0.50	96.94
16 Australia	22	1,652		1,652	0.35	97.29
17 Netherlands	25	720	675	1,395	0.29	97.58
18 South Africa	16	320	1,025	1,345	0.28	97.87
19 South Korea	36	960	320	1,280	0.27	98.14
22 France	19	980		980	0.21	98.34
21 Bahrain			955	955	0.20	98.55
22 Mexico	21		870	870	0.18	98.73
23 Kenya	29		840	840	0.18	98.91
24 Canada	33		640	640	0.14	99.04
25 China	23	640		640	0.14	99.18
26 Finland	14	640		640	0.14	99.31
27 Denmark		350	235	585	0.12	99.44

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

DESTINATION	POSITION HELD IN JANUARY	QUANTITY (60kg bags)			%AGE MARKET SHARE	
		Robusta	Arabica	Total	Individual	Cumulative
28 Egypt	26		350	350	0.07	99.51
29 Libya		350		350	0.07	99.58
30 Poland	32	350		350	0.07	99.66
31 Turkey	28	350		350	0.07	99.73
32 Ukraine	24	350		350	0.07	99.81
33 Albania		320		320	0.07	99.87
34 Singapore	35	320		320	0.07	99.94
35 South Sudan	31		275	275	0.06	100.00

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

BUYERS	POSITION HELD IN JANUARY	QUANTITY (60kg BAGS)			%AGE MARKET SHARE	
		Robusta	Arabica	Total	Individual	Cumulative
Total		388,646	84,348	472,994	100.00	
1 Sucafina	1	56,604	5,710	62,314	13.17	13.17
2 Olam International	2	47,450	10,920	58,370	12.34	25.51
3 Volcafe	4	25,366	22,915	48,281	10.21	35.72
4 Altasheel Import & Export	3	36,750		36,750	7.77	43.49
5 Ecom Agro Industrialist	5	15,360	10,955	26,315	5.56	49.06
6 Bernhard Rothfos	6	23,776		23,776	5.03	54.08
7 Coex Coffee International	7	15,318	4,508	19,826	4.19	58.27
8 Nestle Japan		17,520		17,520	3.70	61.98
9 Hamburg Coffee	9	13,852		13,852	2.93	64.91
10 Icona Café	10	10,616	1,320	11,936	2.52	67.43
11 Bercher Coffee Consulting	17	11,534		11,534	2.44	69.87
12 Cofftea (Sudan)	23	10,150		10,150	2.15	72.01
13 Aldwami Co	8	9,800		9,800	2.07	74.09
14 Strauss	11	6,538	2,800	9,338	1.97	76.06
15 Grb	20		6,120	6,120	1.29	77.35
16 Louis Dreyfus	13	5,950		5,950	1.26	78.61
17 Luigi Lavazza	18	4,192		4,192	0.89	79.50
18 Pacorini Silocaf	12	4,145		4,145	0.88	80.38
19 Intergrano		3,316	660	3,976	0.84	81.22
20 Elmathahib	27	3,850		3,850	0.81	82.03
21 Les Cafes		3,424		3,424	0.72	82.75
22 Ned Coffee B.V	24	3,299		3,299	0.70	83.45
23 Jiva International	22	3,280		3,280	0.69	84.14
24 Lova Impex		3,200		3,200	0.68	84.82
25 Tropical Gmbh		3,060		3,060	0.65	85.47
26 Tata Coffee	28	3,000		3,000	0.63	86.10
27 Falcon Commodities	19		2,910	2,910	0.62	86.72
28 Koninklijke Douwe	14	2,880		2,880	0.61	87.33
29 Nkg Bero Italia	25	2,695		2,695	0.57	87.90
30 Others		41,721	15,530	57,251	12.10	100.00