



### Key Highlights

- A total of 477,561-kilo bags of coffee valued at US\$ 45.87 million were exported in March 2020 at an average weighted price of US\$ 1.60 /kilo, 5 cents lower than US\$ 1.65 /kilo in February 2020.
- Coffee exports for the 12-months period (April 2019 to March 2020) totalled to 4,877,141 bags worth US 471.59 million compared to 4,108,401 bags (US\$ 420.45 million) the previous year.
- Farm-gate prices for Robusta Kiboko averaged UGX 2,000 per kilo; FAQ UGX 4,000 per kilo, Arabica parchment UGX 5,400 per kilo and Drugar UGX 5,000 per kilo.
- 78.40% of the total volume was exported by 10 exporters, out of 44 companies which performed during the month compared to 80.07% in February 2020.
- The ICO Composite Indicator price increased by 6.9% to 109.05 US cents/lb in March 2020 from US cents/lb 102.00 in February 2020.

### 1. Coffee exports

Coffee exports in March 2020 amounted to 477,561 60-kilo bags worth US\$ 45.87 million as shown in Fig 1. This comprised 385,978 bags (US \$ 33.09 million) of Robusta and 91,583 bags (US\$ 12.78 million) of Arabica (see Table 1 and Annex 1). This was an increase of 38.39% and 35.72% in quantity and value respectively from the same month last year.

By comparing quantity of coffee exported by type in the same month of last Coffee Year (March 2019 and 2020), Robusta registered a percentage increase both in quantity and value (45.29% and of 36.24%) respectively. Arabica exports also registered a percentage increase in both quantity and value (15.30% and 34.39%) respectively.

The increase in exports has been attributed to the increased production on account of fruition of the newly planted coffee, the onset of rains notwithstanding. Exporters also drew down on their stocks in the midst of the lockdown due to the COVID-19 pandemic. Exports are yet to be affected by the virus.

Coffee exports for the first 9 months (Financial Year 2019/20) amounted to 3,883,309-kilo bags worth US\$ 376.60 million compared to 3,175,685 60-kilo bags worth US\$ 320.21 million the previous year. This represents 22.28% and 17.61% increase in both quantity and value respectively. Cumulatively in twelve months, (April 2019–March 2020), a total of 4.88 million 60-kg bags worth US\$ 471.59 million were exported (figure 1).

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

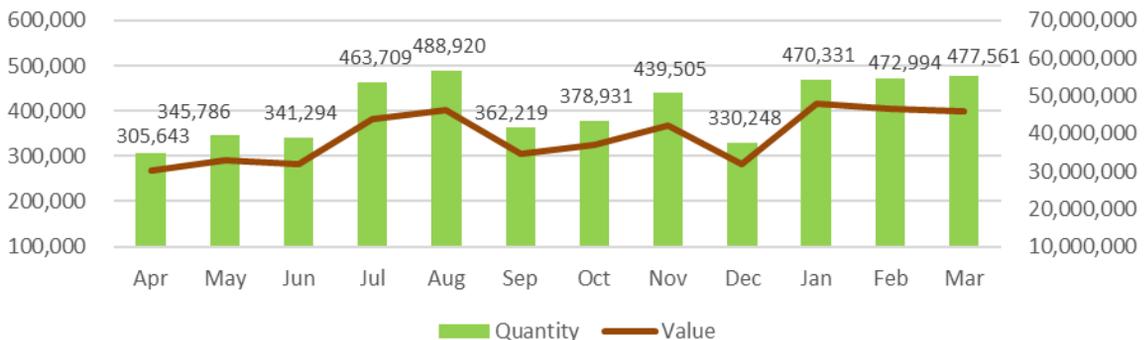


Table1: Comparison of Coffee Exports of March 2018/19 and 2019/20 Coffee Years

Period/Coffee Type	2019/20		2018/19		%age Change	
	Qty(60-kilobag)	Value (US \$)	Qty(60-kilobag)	Value (US \$)	Qty(60-kilobag)	Value (US \$)
<b>March Total</b>	477,561	45,866,460	345,085	33,794,213	↑ 38.39	↑ 35.72
Robusta	385,978	33,085,755	265,655	24,284,040	↑ 45.29	↑ 36.24
Arabica	91,583	12,780,705	79,430	9,510,173	↑ 15.30	↑ 34.39

## 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 March 2020. The average export price was US\$ 1.60 per kilo, 5 cents lower than US\$ 1.65 per kilo realized last month. Robusta exports accounted for 80.22% of total exports compared to 82.17% in February 2020. The average Robusta price was US\$ 1.43 per kilo, US cents 6 lower than the previous month. Organic Robusta fetched the highest price of US\$ 1.96 per kilo, a premium of 34 cents over conventional Screen 18 sold at an average of US\$ 1.62 per kilo. Washed Robusta fetched US\$ 1.92 per kilo, a premium of 30 cents over conventional Screen 18.

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

Coffee type	Quantity 60-Kilo Bags	%-age Quantity	Value in US \$	%-age Value	Unit Price US\$/Kilo
<b>TOTAL</b>	<b>477,561</b>		<b>45,866,460</b>		<b>1.60</b>
Organic Robusta	680	0.18	80,123	0.24	1.96
Washed Robusta	2,648	0.69	305,628	0.92	1.92
Screen 18	28,916	7.49	2,817,505	8.52	1.62
Screen 17	17,542	4.54	1,673,529	5.06	1.59
Screen 15	199,441	51.67	17,545,722	53.03	1.47
Screen 14	334	0.09	24,847	0.08	1.24
Screen 13	14,040	3.64	1,233,337	3.73	1.46
Screen 12	64,252	16.65	5,391,190	16.29	1.40
BHP 1199	32,725	8.48	2,247,227	6.79	1.14
Other Robustas	25,400	6.58	1,766,648	5.34	1.16
<b>Total Robustas</b>	<b>385,978</b>	<b>100.00</b>	<b>33,085,755</b>	<b>100.00</b>	<b>1.43</b>
Organic Bugisu	103	0.11	14,987	0.12	2.43
Organic Okoro	3,150	3.44	574,657	4.50	3.04
Organic Drugar	700	0.76	108,103	0.85	2.57
Sustainable Arabica (Sipi Falls)	920	1.00	226,364	1.77	4.10
Mt Elgon AA	152	0.17	29,762	0.23	3.26
Mt Elgon A+	11,816	12.90	2,127,643	16.65	3.00
Mt Elgon A	28	0.03	11,111	0.09	6.61
Bugisu A+	320	0.35	46,984	0.37	2.45
Bugisu AA	7,831	8.55	1,337,327	10.46	2.85
Bugisu A	95	0.10	14,954	0.12	2.62
Bugisu AB	7,600	8.30	1,159,407	9.07	2.54
Bugisu C/PB	640	0.70	103,577	0.81	2.70
Bugisu B	69	0.08	10,770	0.08	2.60
Bugisu C	640	0.70	82,371	0.64	2.15
Bugisu PB	4	0.00	815	0.01	3.40
Wugar	12,093	13.20	1,573,854	12.31	2.17
Drugar	35,947	39.25	4,444,643	34.78	2.06
Mixed Arabica	930	1.02	103,771	0.81	1.86
Other Arabicas	8,545	9.33	809,607	6.33	1.58
<b>Total Arabicas</b>	<b>91,583</b>	<b>100.00</b>	<b>12,780,705</b>	<b>100.00</b>	<b>2.33</b>

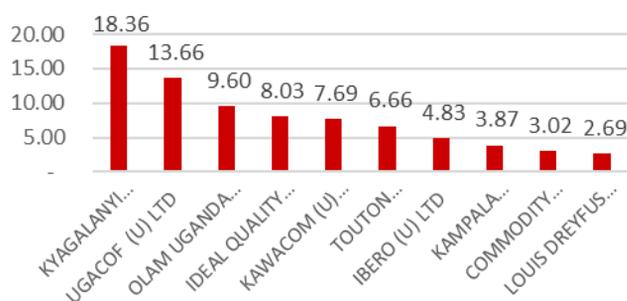
Arabica fetched an average price of US\$ 2.33 per kilo, 6 cents lower than in February 2020. The highest price was for Mt. Elgon A sold at US\$ 6.61 per kilo. It should be noted however that the volume was small. It was followed by Sipi Falls sold at a unit price of US\$ 4.10 per kilo, a premium of US\$ 1.25 over conventional Bugisu AA. Organic Drugar fetched US\$ 2.57 per kilo, 51 cents over conventional Drugar. Drugar exports had a 39% share of Arabica exports compared to 41% the previous month.

## 3. Individual Exporter Performance

Figure 2 shows the top 10 export companies in the month of March 2020. Kyagalanyi Coffee Ltd led with a market share of 18.36% same as last month. It was followed by Ugacof (U) Ltd 13.66% (13.81%); Olam Uganda Ltd 9.60% (10.23%); Ideal Quality Commodities (U) Ltd 8.03% (9.01%) Kawacom (U) Ltd 7.79% (6.83%) Touton Uganda Limited 6.66% (7.31%); and Ibero (U) Ltd 4.83% (5.03 %).

The top 10 exporters held a market share of 78.40% compared to 80.07% the previous month. There were minor changes in positions compared to last month reflecting efficiency of major exporters. Out of the 44 exporters that performed, 16 exported Robusta Coffee only while 12 exported Arabica coffee only. Annex 2 shows a detailed list of exporters performance in March 2020.\*The figures in brackets represent percentage market share held in February 2020.

**Figure 2: Top 10 Exporting Companies by percentage market share**



## 4. Local Situation

During the month of March 2020, farm gate prices ranged from Sh.1,800 -2,200 per kilo of Kiboko (Robusta dry cherries); Shs. 3,800-4,200/= for FAQ; Sh. 5,300-5,500/= for Arabica parchment; and Sh. 4,800-5,200/= per kilo for Drugar from Kasese. Robusta Kiboko averaged UGX 2,000 per kilo; FAQ UGX 4,000 per kilo, Arabica parchment UGX 5,400 per kilo and Drugar UGX 5,000 per kilo.

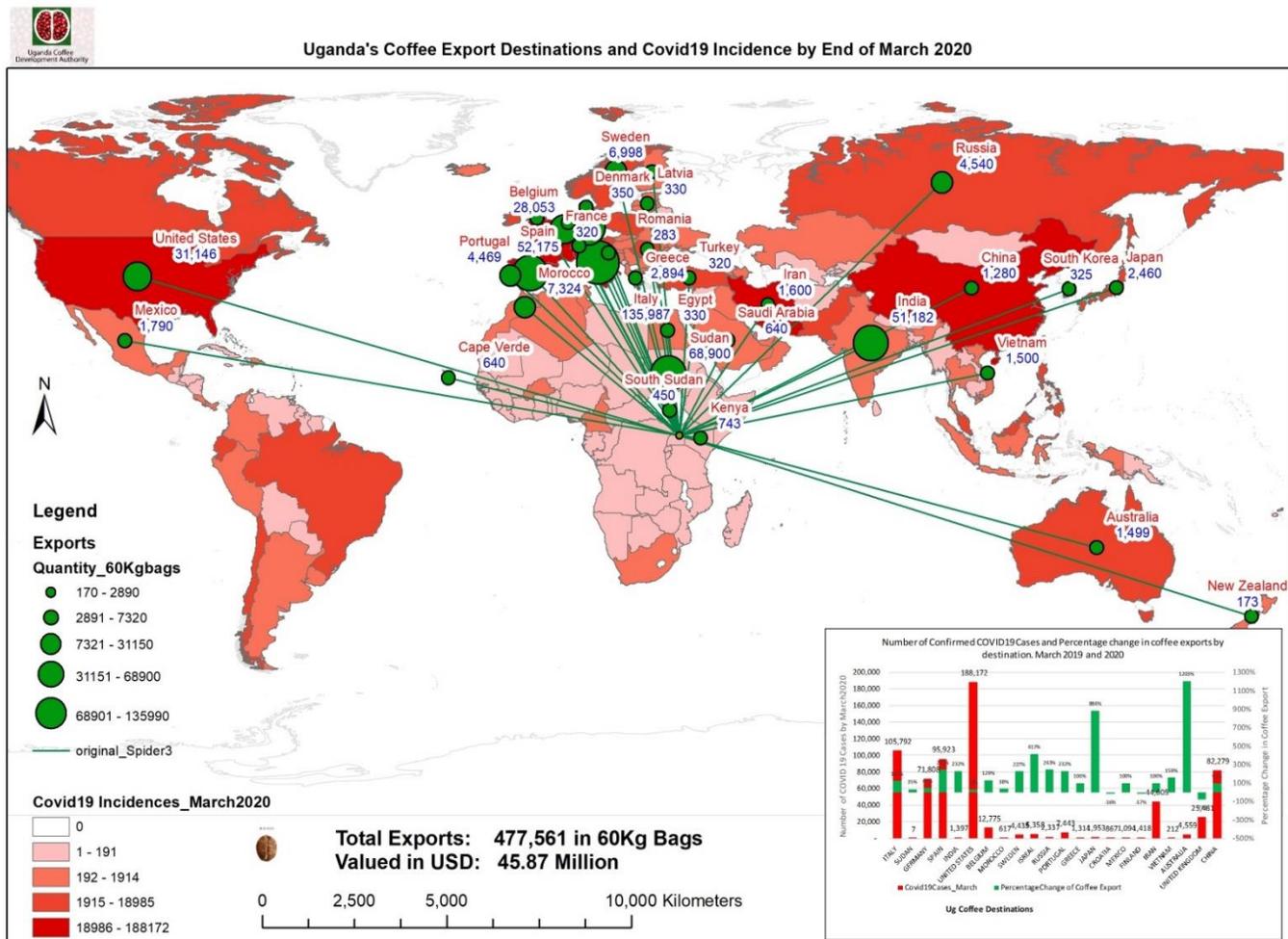
## 5. Global Situation

World coffee exports amounted to 11.11 million bags in February 2020, compared with 10.84 million in February 2019. Exports in the first 5 months of Coffee Year 2019/20 (Oct/19 to Feb/20) have decreased by 3.4% to 50.97 million bags compared to 52.78 million bags in the same period in 2018/19. The ICO Composite Indicator price increased by 6.9% to 109.05 US cents/lb in March 2020 from US cents/lb 102.00 in February 2020. Coffee prices for Arabica increased due to supply concerns in major producing countries especially Brazil that pushed prices higher. Robusta prices fell by 0.9% from 68.07 US cents/lb in February to 67.47 US cents/lb in March 2020.

## 6. Coffee Exports by Destination

The destinations of Uganda's coffee exports during the month of March 2020 are shown in Fig 3 (details in Annex 3). Exports to Italy had the highest market share with 28.48% (33.17%). It was followed by Sudan 14.43% (13.33%), Germany 11.76% (12.59%) and Spain 10.93% (11.32%). Coffee exports to Africa amounted to 77,747 bags, a market share of 16.28% compared to 77,972 bags (16.5%) 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 February 2020.

Figure 2 shows destinations of Uganda coffee and incidence of COVID-19. There has not been any significant impact yet on Uganda's coffee exports to various destinations.



## 7. Foreign buyers of Uganda Coffee

Annex 4 shows a list of Ugandan coffee buyers in March 2020. The top 10 buyers held a market share of 68.51% of total exports, higher than 67.43% the previous month. Sucafina led with a market share of 12.89% compared to 13.13% in February 2020. It was followed by Volcafe 12.29% (10.21%); Olam International 11.19% (12.34%); Altasheel Import & Export 9.60% (7.77%); Ecom Agro Industrial 5.95% (5.56%) Bernhard Rothfos 5.64% (5.03%); Coex Coffee International 3.31% (4.19%), Minor changes in relative position compared to the previous month reflect consolidation and efficiency of major buyers as well as increased for Uganda coffee.

Note: The figures in brackets represent percentage performance in the previous month –February 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 as shown in the map below.

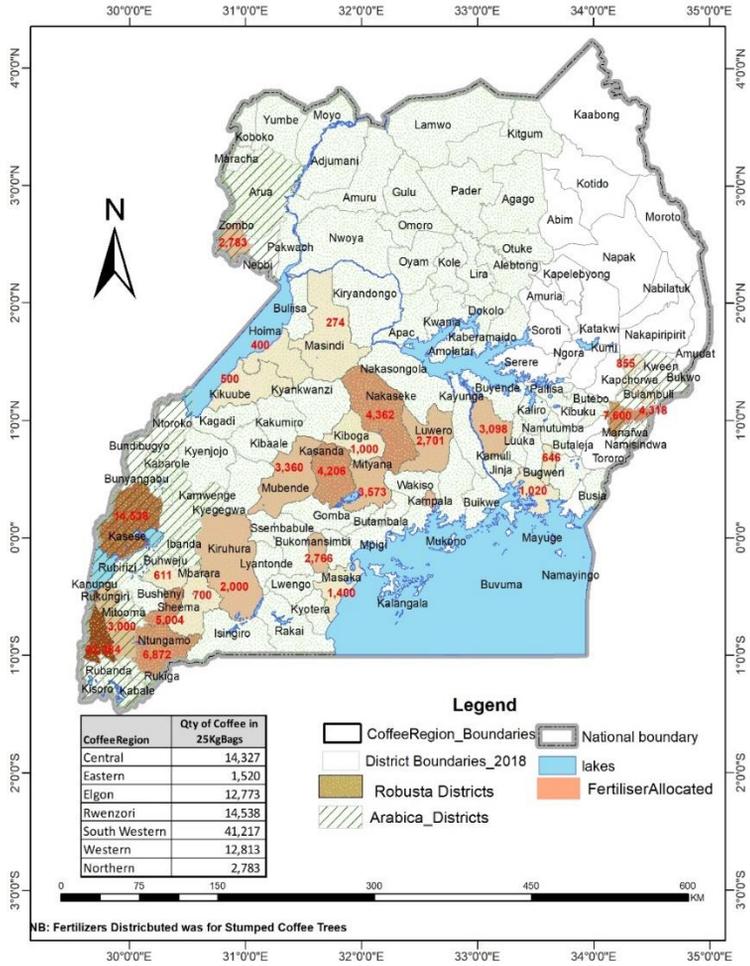
## 9. Outlook for April 2020

Coffee exports are projected to be 400,000 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 North of the equator has virtually ended. Emphasis is now on the main crop from South of the equator starting in May which is likely to be good due to adequate rains. The effect of COVID-19 on coffee production has not been quantified yet.

A sustainable coffee industry with high stakeholder value for social economic transformation



Quantity of Fertilisers Distributed in 25Kg Bags per District



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

Coffee Year	2019/20		2018/19		%age Change	
	Quantity	Value \$	Quantity	Value \$	Quantity	Value \$
<b>Grand Total</b>	<b>2,568,517</b>	<b>251,607,407</b>	<b>2,132,293</b>	<b>214,088,778</b>	<b>20.46</b>	<b>17.52</b>
<b>Total Robusta</b>	<b>2,071,846</b>	<b>185,510,369</b>	<b>1,632,917</b>	<b>153,161,623</b>	<b>26.88</b>	<b>21.12</b>
<b>Total Arabica</b>	<b>496,671</b>	<b>66,097,038</b>	<b>499,376</b>	<b>60,927,155</b>	<b>-0.54</b>	<b>8.49</b>
<b>March</b>	<b>477,561</b>	<b>45,866,460</b>	<b>345,085</b>	<b>33,794,213</b>	<b>38.39</b>	<b>35.72</b>
Robusta	385,978	33,085,755	265,655	24,284,040	45.29	36.24
Arabica	91,583	12,780,705	79,430	9,510,173	15.30	34.39
<b>February</b>	<b>472,994</b>	<b>46,729,470</b>	<b>323,182</b>	<b>32,594,100</b>	<b>46.36</b>	<b>43.37</b>
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	36.8	44.28
<b>January</b>	<b>470,331</b>	<b>48,046,709</b>	<b>394,937</b>	<b>39,197,834</b>	<b>19.09</b>	<b>22.57</b>
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	47.81
<b>December</b>	<b>330,248</b>	<b>31,868,091</b>	<b>314,437</b>	<b>32,295,410</b>	<b>5.03</b>	<b>-1.32</b>
Robusta	280,603	24,990,250	243,160	23,206,944	15.4	7.68
Arabica	49,645	6,877,841	71,277	9,088,466	-30.35	-24.32
<b>November</b>	<b>439,145</b>	<b>42,193,666</b>	<b>401,447</b>	<b>41,123,564</b>	<b>9.39</b>	<b>2.6</b>
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	-9.2
<b>October</b>	<b>378,238</b>	<b>36,903,012</b>	<b>353,205</b>	<b>35,083,657</b>	<b>7.09</b>	<b>5.19</b>
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: March 2020

EXPORTING COMPANY	POSITION HELD IN FEBRUARY	QUANTITY (Bags)			PERCENTAGE MARKET SHARE	
		Robusta	Arabica	Total	Individual	Cumulative
<b>Total</b>		<b>385,978</b>	<b>91,583</b>	<b>477,561</b>	<b>100</b>	
1 Kyagalanyi Coffee Factory Ltd	1	53,419	34,238	87,657	18.36	18.36
2 Ugacof (U) Ltd	2	59,427	5,790	65,217	13.66	32.01
3 Olam Uganda Ltd	3	42,962	2,880	45,842	9.60	41.61
4 Ideal Quality Commodities Ltd	4	37,980	360	38,340	8.03	49.64
5 Kawacom (U) Ltd	6	20,180	16,523	36,703	7.69	57.32
6 Touton Uganda Limited	5	29,378	2,450	31,828	6.66	63.99
7 Ibero (U) Ltd	7	23,064		23,064	4.83	68.82
8 Kampala Domestic Store Ltd	8	18,498		18,498	3.87	72.69
9 Commodity Solutions (U) Ltd	9	14,402		14,402	3.02	75.71
10 Louis Dreyfus Company (U) Ltd	12	10,780	2,090	12,870	2.69	78.40
11 Besmark Coffee Company Limited	10	8,031	4,160	12,191	2.55	80.96
12 Export Trading Company (U) Ltd	17	9,100	960	10,060	2.11	83.06
13 Great Lakes Coffee Company Ltd	20		8,445	8,445	1.77	84.83
14 Sena Indo Uganda Limited	16	8,025		8,025	1.68	86.51
15 Tata Uganda Limited	23	7,500		7,500	1.57	88.08
16 Grainpulse Ltd	11	5,164	1,785	6,949	1.46	89.54
17 Nakana Coffee Factory Ltd	14	6,616		6,616	1.39	90.92
18 Coffee World Ltd	13	5,394		5,394	1.13	92.05
19 Bakhsons Trading Co. (U) Ltd	19	2,080	2,680	4,760	1.00	93.05
20 The Edge Trading (U) Ltd	21	4,572	146	4,718	0.99	94.04
21 Ishaka Quality Commodities Ltd	18	4,440		4,440	0.93	94.97
22 Mbale Importers & Exporters Ltd	22	2,686	1,710	4,396	0.92	95.89
23 Discovery Trading Limited	31	2,734	1,000	3,734	0.78	96.67
24 Darley Investments Ltd	15	1,986	660	2,646	0.55	97.22
25 Kaweri Coffee Plantation	28	1,920		1,920	0.40	97.62
26 Platinum Commodities (Jkr) Ltd		1,670		1,670	0.35	97.97
27 Ankole Coffee Producers Coop Union Ltd	24	1,620		1,620	0.34	98.31

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

EXPORTING COMPANY	POSITION HELD IN FEBRUARY	QUANTITY (Bags)		Percentage Market Share		
		Robusta	Arabica	Total	Individual	Cumulative
28 Fairlop Global Commodities Ltd			990	990	0.21	98.52
29 United Organic Coffee Growers Limited			970	970	0.20	98.72
30 Bukonzo Joint Co-operative Union Ltd	32		960	960	0.20	98.92
31 Gisha Coffee Ltd	34	710		710	0.15	99.07
32 Bakwanye Trading Co. Ltd	27		680	680	0.14	99.22
33 Rezlex Investment Ltd	30	680		680	0.14	99.36
34 Tariq General Suppliers Ltd	26		450	450	0.09	99.45
35 Gorilla Summit Coffee Development	36		329	329	0.07	99.52
36 Banyankole Kweterana Coop Union Ltd		320		320	0.07	99.59
37 Kibinge Coffee Farmers' Coop Soc Ltd		320		320	0.07	99.66
38 Mt Elgon Agroforestry Communities			320	320	0.07	99.72
New Bukumbi Coffee Processors						
39 Limited			320	320	0.07	99.79
40 Prime Coffee Limited		320		320	0.07	99.86
41 Rwenzori Farmer's Co-operative Union			320	320	0.07	99.92
42 Zukuka Bora Coffee Company			199	199	0.04	99.96
43 Bugisu Coop Union Ltd			167	167	0.03	100.00
44 Zombo Coffee Partners Limited			1	1	0.00	100.00

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

DESTINATION	POSITION HELD IN FEBRUARY	QUANTITY (60kg bags)			%AGE MARKET SHARE		
		Robusta	Arabica	Total	Individual	Cumulative	
Total		385,978	91,583	477,561	100.00		
1 Italy	1	120,742	15,245	135,987	28.48	28.48	
2 Sudan	2	68,900		68,900	14.43	42.90	
3 Germany	3	35,601	20,568	56,169	11.76	54.66	
4 Spain	4	51,205	970	52,175	10.93	65.59	
5 India	6	46,244	4,938	51,182	10.72	76.31	
6 United States	5	6,762	24,384	31,146	6.52	82.83	
7 Belgium	7	21,848	6,205	28,053	5.87	88.70	
8 Morocco	8	6,004	1,320	7,324	1.53	90.24	
9 Sweden	13	680	6,318	6,998	1.47	91.70	
10 Isreal	9	5,130	610	5,740	1.20	92.90	
11 Russia	11	3,900	640	4,540	0.95	93.85	
12 Portugal	10	4,469		4,469	0.94	94.79	
13 Greece	12	1,280	1,614	2,894	0.61	95.40	
14 Japan	15	2,160	300	2,460	0.52	95.91	
15 Croatia		2,110		2,110	0.44	96.35	
16 Mexico	22		1,790	1,790	0.37	96.73	
17 Finland	26	640	1,000	1,640	0.34	97.07	
18 Iran		1,600		1,600	0.34	97.41	
19 Vietnam		1,500		1,500	0.31	97.72	
22 Australia	16		1,499	1,499	0.31	98.03	
21 United Kingdom		1,400		1,400	0.29	98.33	
22 China	25	960	320	1,280	0.27	98.60	
23 Kenya	23		743	743	0.16	98.75	
24 Netherlands	17	360	350	710	0.15	98.90	
25 Switzerland	14	320	334	654	0.14	99.04	
26 Cape Verde		640		640	0.13	99.17	
27 Saudi Arabia			640	640	0.13	99.31	

A sustainable coffee industry with high stakeholder value for social economic transformation

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

DESTINATION	POSITION HELD IN FEBRUARY	QUANTITY (60kg bags)			%AGE MARKET SHARE	
		Robusta	Arabica	Total	Individual	Cumulative
28 South Sudan	35		450	450	0.09	99.40
29 Denmark	27		350	350	0.07	99.47
30 Egypt	28	330		330	0.07	99.54
31 Latvia			330	330	0.07	99.61
32 South Korea	19		325	325	0.07	99.68
33 France	22	320		320	0.07	99.75
34 Turkey	31	320		320	0.07	99.81
35 Romania		283		283	0.06	99.87
36 Slovenia		270		270	0.06	99.93
37 New Zealand			173	173	0.04	99.97
38 Jordan			167	167	0.03	100.00

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

BUYERS	POSITION HELD IN FEBRUARY	QUANTITY (60kg BAGS)			%AGE MARKET SHARE	
		Robusta	Arabica	Total	Individual	Cumulative
<b>Total</b>		<b>385,978</b>	<b>91,583</b>	<b>477,561</b>	<b>100.00</b>	
1 Sucafina	1	55,746	5,790	61,536	12.89	12.89
2 Volcafe	3	38,874	19,798	58,672	12.29	25.17
3 Olam International	2	49,842	3,590	53,432	11.19	36.36
4 Altasheel Import & Export	4	45,850		45,850	9.60	45.96
5 Ecom Agro Industrialist	5	12,480	15,931	28,411	5.95	51.91
6 Bernhard Rothfos	6	26,572	350	26,922	5.64	57.55
7 Coex Coffee International	7	11,970	3,840	15,810	3.31	60.86
8 Hamburg Coffee	9	12,188	1,320	13,508	2.83	63.69
9 Aldwami Co	13	11,784		11,784	2.47	66.15
10 Tata Coffee	26	11,250		11,250	2.36	68.51
11 Luigi Lavazza	17	10,188		10,188	2.13	70.64
12 Nestle Espana S.A		7,560		7,560	1.58	72.23
13 Ned Coffee B.V	22	7,037		7,037	1.47	73.70
14 Cofftea	12	7,000		7,000	1.47	75.17
15 Nestle Japan	8	6,080		6,080	1.27	76.44
16 Guzman		4,776	990	5,766	1.21	77.65
17 Icona Café	10	4,326	1,320	5,646	1.18	78.83
18 GRB	15	150	5,160	5,310	1.11	79.94
19 Strauss	14	2,609	2,690	5,299	1.11	81.05
20 Indus Coffee		3,600	1,160	4,760	1.00	82.05
21 Bercher Coffee Consulting	11	3,690	960	4,650	0.97	83.02
22 Elmathahib	20	4,550		4,550	0.95	83.97
23 Sln Coffee Ltd		4,160		4,160	0.87	84.84
24 Nkg Bero Italia	29	4,001		4,001	0.84	85.68
25 ETC Trading		3,470		3,470	0.73	86.41
26 J. Wolff			3,420	3,420	0.72	87.12
27 Sobhy Nachly & Sons		3,200		3,200	0.67	87.79
28 Louis Dreyfus	16	3,160		3,160	0.66	88.46
29 CCL Products		3,150		3,150	0.66	89.12
30 Others		26,715	25,264	51,979	10.88	100.00

A sustainable coffee industry with high stakeholder value for social economic transformation