



MINISTRY OF AGRICULTURE, ANIMAL INDUSTRIES AND FISHERIES



Uganda Coffee Development Authority

Key Highlights



A total of 543,251-kilo bags of coffee valued at US\$ 49.78 million were exported in July 2020 at an average weighted price of US\$ 1.53 /kilo, 6 cents lower than US\$ 1.59 /kilo in June 2020. This was an increase of 17.15% and 13.67% in quantity and value respectively compared to the same period last year.



Coffee exports for the 12-months period (August 2019 to July 2020) totalled to 5,185,423 bags worth US\$ 502.27 million compared to 4,239,095 bags worth US\$ 418.39 million the previous year.

Organic Drugar fetched the highest price of US\$ 7.49/kilo



Farm-gate prices for Robusta Kiboko averaged UGX 1,900 per kilo; FAQ UGX 3,900 per kilo, Arabica parchment UGX 4,900 per kilo and Drugar UGX 4,250 per kilo.



81.93% of the total volume was exported by 10 exporters, out of 42 companies which performed during the month compared to 80.99% in June 2020, reflecting increasing concentration.



The ICO Composite Indicator price increased by 4.7% to 103.66 US cents/lb in July 2020 from US cents/lb 99.05 in June 2020.

1. Coffee exports

Coffee exports in July 2020 amounted to 543,251 60-kilo bags worth US\$ 49.78 million as shown in Fig 1. This comprised 467,160 bags (US \$ 39.99 million) of Robusta and 76,091 bags (US\$ 9.98 million) of Arabica (see Table 1 and Annex 1). This was an increase of 17.15% and 13.67% in quantity and value respectively from the same month last year. This is the highest monthly export figure in terms of quantity since liberalisation.

The increase in exports has been attributed to the increased production on account of fruition of the newly planted coffee, and favourable weather. Exporters also drew down on their stocks after easing of the lockdown due to the COVID-19 pandemic. Exports have to some extent been affected by logistical issues such as lack of containers.

By comparing quantity of coffee exported by type in the same month of last Coffee Year (July 2019), Robusta increased both in quantity and value (20.84% and of 13.17%) respectively. Arabica exports registered a 1.34% decrease in quantity and 15.74% increase in value.

Coffee exports for the 12 months amounted to 5,185,423-kilo bags worth US\$ 502.27 million compared to 4,239,095 60-kilo bags worth US\$ 418.39 million the previous year. This represents 22.32% and 20.05% increase in both quantity and value respectively. (figure 1)

Fig 1: Trend of Total Quantity and Value of Coffee Exported: August 2019- July 2020



Table1: Comparison of Coffee Exports of July 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 \$)
July Total	543,251	49,977,439	463,709	43,965,256	↑ 17.15	↑ 13.67
Robusta	467,160	39,992,633	386,584	35,338,116	↑ 20.84	↑ 13.17
Arabica	76,091	9,984,806	77,125	8,627,139	↓ -1.34	↑ 15.74

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 July 2020. The average export price was US\$ 1.53 per kilo, 6 cents lower than US\$ 1.59 per kilo realized last month. Robusta exports accounted for 85.99% of total exports compared to 79.56% in June 2020. The average Robusta price was US\$ 1.43 per kilo, US cent 2 higher than the previous month. Organic Robusta fetched the highest price of US\$ 1.72 per kilo, a premium of 24 cents over conventional Screen 18 sold at an average of US\$ 1.48 per kilo. Worth noting is that Screen 17 fetched a higher price than Screen 18 at US\$ 1.57.

This reflects price differentiation and a positive impact on the new grades.

Arabica fetched an average price of US\$ 2.19 per kilo, 19 cents higher than in June 2020. The highest price was for Organic Drugar sold at US\$ 7.29 per kilo., followed by Sustainable Arabica Sipi Falls sold at US\$ 3.47 per kilo. Drugar exports had a 40% share of Arabica exports compared to 35% the previous month.

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

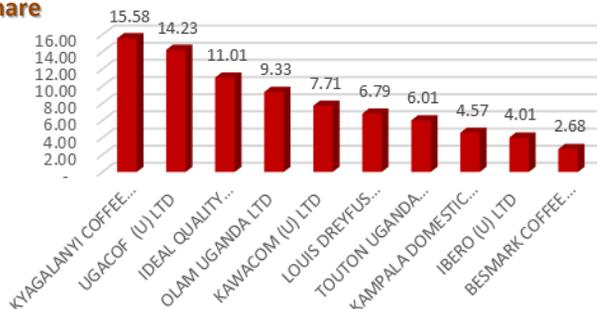
Coffee type	Quantity 60-Kilo Bags	%-age Quantity	Value in US \$	%-age Value	Unit Price US\$/Kilo
TOTAL	543,251		49,977,439		1.53
Organic Robusta	2,020	0.43	208,429	0.52	1.72
Washed Robusta	1,297	0.28	128,808	0.32	1.66
Screen 18	56,225	12.04	4,981,757	12.46	1.48
Screen 17	52,536	11.25	4,961,324	12.41	1.57
Screen 15	250,540	53.63	21,643,668	54.12	1.44
Screen 14	8,880	1.90	791,264	1.98	1.49
Screen 12	65,154	13.95	5,303,946	13.26	1.36
BHP 1199	21,560	4.62	1,344,761	3.36	1.04
Other Robustas	8,948	1.92	628,675	1.57	1.17
Total Robusta	467,160	100.00	39,992,633	100.00	1.43
Organic Bugisu	320	0.42	38,984	0.39	2.03
Organic Okoro	1,560	2.05	212,455	2.13	2.27
Sustnable Arabica Sipi Falls	1,470	1.93	306,166	3.07	3.47
Organic Wugar	320	0.42	59,260	0.59	3.09
Organic Drugar	101	0.13	44,147	0.44	7.29
Mt Elgon A+	3,928	5.16	674,257	6.75	2.86
Bugisu A+	4,242	5.57	680,392	6.81	2.67
Bugisu AA	4,944	6.50	758,067	7.59	2.56
Bugisu A	7	0.01	1,019	0.01	2.43
Bugisu AB	750	0.99	110,096	1.10	2.45
Bugisu C/PB	1,040	1.37	135,175	1.35	2.17
Bugisu PB	24	0.03	3,352	0.03	2.33
Bugisu C	2,560	3.36	321,695	3.22	2.09
Wugar	13,905	18.27	2,187,674	21.91	2.62
Drugar	30,330	39.86	3,592,546	35.98	1.97
Other Arabicas	10,590	13.92	859,521	8.61	1.35
Total Arabica	76,091	100.00	9,984,806	100.00	2.19

3. Individual Exporter Performance

Figure 2 shows the top 10 export companies in the month of July 2020. Kyagalanyi Coffee Ltd led with a market share of 15.58% compared to 18.54% last month. It was followed by Ugacof (U) Ltd 14.23% (9.52%); Ideal Quality Commodities Ltd 11.01% (10.85%); Olam Uganda Ltd 9.33% (11.43%) Kawacom (U) Ltd 7.71% (6.91%) Louis Dreyfus Company (U) Ltd 6.79% (5.32%); and Touton Uganda Limited 6.01% (4.88 %).

The top 10 exporters held a market share of 81.93% compared to 80.89% the previous month. There were minor changes in positions compared to last month reflecting efficiency of exporters. Out of the 42 exporters that performed, 18 exported Robusta Coffee only while 8 exported Arabica coffee only. Annex 2 shows a detailed list of exporters performance in July 2020.*The figures in brackets represent percentage market share held in June 2020.

Figure 2: Top 10 Exporting Companies by percentage market share



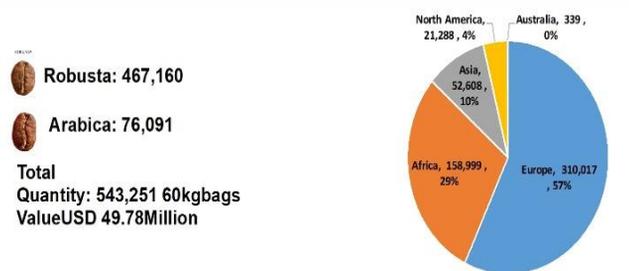
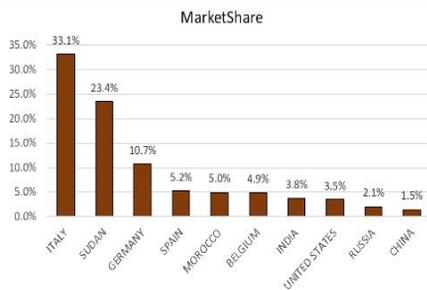
4. Foreign buyers of Uganda Coffee

Annex 4 shows a list of Ugandan coffee buyers in July 2020. The top 10 buyers held a market share of 68.93% of total exports, higher than 67.08% the previous month. Sucafina led with a market share of 12.57% compared to 8.86% in June 2020. It was followed by Olam International 12.06% (13.36%); Altasheel Import and Export Enterprises 11.40% (11.16%); Volcafe 10.53% (9.37%) Ecom Agroindustrial 5.39% (4.06%); Aldwami Co. 4.45% (3.74%). Changes in relative position compared to the previous month reflect competition among major buyers of Uganda coffee. *Note: The figures in brackets represent percentage performance in the previous month –June 2020.*

5. Coffee Exports By Destination

The destinations of Uganda’s coffee exports during the month of July 2020 are shown in Fig 3 (details in Annex 3). Italy maintained the highest market share with 33.14% compared with 31.08% last month. It was followed by Sudan 23.41% (22.90%), Germany 10.74% (11.29%) and Spain 5.22% (5.89%). Coffee exports to Africa amounted to 158,999 bags, a market share of 29.27% compared to 106,715 bags (25.39%) the previous month. Africa countries included Sudan, Morocco, South Africa, Kenya, South Sudan and Egypt. Europe remains the main destination for Uganda’s coffees with a 57.36% imports share. **The figures in brackets represent percentage market share held in June 2020.*

Figure 3: Map showing Main Destinations of Uganda Coffee by Quantity in 60kg Bags: July 2020



6. Global Situation

World coffee exports amounted to 10.57 million bags in June 2020, compared with 11.15 million in June 2019. Exports in the first 9 months of Coffee Year 2019/20 (Oct 2019 to May 2020) have decreased by 4.7% to 95.36 million bags compared to 100.46 million bags in the same period in 2018/19. The ICO Composite Indicator price increased by 4.7% to 103.66 US cents/lb in July 2020 from US cents/lb 99.05 in June 2020. Strength in the Brazilian currency (Real) and concerns over temporary tightness in coffee supply from major producers including Brazil and Vietnam supported the prices.

7. Local Situation

During the month of June 2020, farm gate prices ranged from Sh.1,800 -2,000 per kilo of Kiboko (Robusta dry cherries); Shs. 3,800-4,000/= for FAQ; Sh. 4,800-5,000/= for Arabica parchment; and Sh. 4,000-4,500/= per kilo for Drugar from Kasese. Robusta Kiboko averaged UGX 1,900 per kilo; FAQ UGX 3,900 per kilo, Arabica parchment UGX 4,900/= per kilo and Drugar UGX 4,250 per kilo.

8. Coffee Development and Promotional Activities

During the month of July, training of cooperatives/ Farmer Organisations on stumping and fertilizer application continued. In Eastern, 20 farmers (17Male, 2Female, 1Youth) from different cooperatives were trained; Central trained 17 coops reaching 1, 511 farmers (1,388M, 123F); Western trained 3 coops reaching 77 farmers (65M, 12F). Seedling distribution continued with Mid North and West Nile distributing 2,189,750 coffee seedlings to **4,713** farmers (M=4,100M, F=613, Y=752), Elgon region allocated **8,600,000** seedlings to its 9 districts for Aug – Nov planting season. Verification of nurseries continued in SW and Rwenzori regions; in S.W, 465,000 CWDr plantlets, and 4,592,000 Arabica seedlings were verified from 49 nursery operators (M=41 & F= 8) while in Rwenzori, 350,000 CWDR plantlets were verified for Sept-Nov planting.

9. Outlook for August 2020

Coffee exports are projected to be 405,000. The effect of COVID-19 on Uganda coffee production is yet to be quantified as lockdown is further relaxed and trucks are able to travel to the rural areas to procure coffee. Harvesting of the main crop south of the Equator started is at its tail end.

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	4,334,340	421,292,924	3,588,725	352,974,570	20.78	19.36
Total Robusta	3,491,959	307,073,967	2,746,047	253,373,897	27.16	21.19
Total Arabica	842,381	114,188,955	842,678	99,600,672	-0.04	14.65
July	543,251	49,977,439	463,709	43,965,256	17.15	13.67
Robusta	467,160	39,992,633	386,584	35,338,116	20.84	13.17
Arabica	76,091	9,984,806	77,125	8,627,139	-1.34	15.74
June	420,563	39,939,668	341,294	31,873,499	23.23	25.31
Robusta	345,008	29,119,423	256,291	22,592,271	34.62	28.89
Arabica	75,555	10,820,246	85,003	9,281,228	-11.11	16.58
May	437,597	42,479,411	345,786	32,998,507	26.55	28.73
Robusta	340,830	29,540,835	250,957	22,319,640	35.81	32.35
Arabica	96,767	12,938,575	94,829	10,678,867	2.04	21.16
April	360,293	36,944,052	305,643	30,048,530	17.88	22.95
Robusta	262,996	22,547,360	219,298	19,962,247	19.93	12.95
Arabica	97,297	14,366,692	86,345	10,086,283	12.68	42.44
March	480,961	46,140,464	345,085	33,794,213	39.37	36.53
Robusta	389,378	33,359,865	265,655	24,284,040	46.57	37.37
Arabica	91,583	12,780,599	79,430	9,510,173	15.30	34.39
February	473,328	46,757,304	323,182	32,594,100	46.46	43.45
Robusta	388,980	34,659,016	261,526	24,209,036	48.73	43.17
Arabica	84,348	12,098,287	61,656	8,385,064	36.80	44.28
January	469,663	47,974,121	394,937	39,197,834	18.92	22.39
Robusta	376,874	34,286,315	325,694	29,937,435	15.71	14.53
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	439,505	42,266,045	401,447	41,123,564	9.48	2.78
Robusta	336,366	30,420,946	291,540	28,108,844	15.38	8.23
Arabica	103,139	11,845,098	109,907	13,014,720	-6.16	-8.99
October	378,931	36,946,329	353,205	35,083,657	7.28	5.31
Robusta	303,764	28,157,324	245,342	23,415,324	23.81	20.25
Arabica	75,167	8,789,005	107,863	11,668,333	-30.31	-24.68

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

EXPORTING COMPANY	POSITION HELD IN JUNE	QUANTITY (Bags)		PERCENTAGE MARKET SHARE		
		Robusta	Arabica	Total	Individual	Cumulative
Total		467,160	76,091	543,251	100.00	
1 Kyagalanyi Coffee Ltd	1	49,191	35,465	84,656	15.58	15.58
2 Ugacof (U) Ltd	4	73,170	4,160	77,330	14.23	29.82
3 Ideal Quality Commodities Ltd	3	59,794		59,794	11.01	40.82
4 Olam Uganda Ltd	2	43,641	7,057	50,698	9.33	50.16
5 Kawacom (U) Ltd	5	30,854	11,054	41,908	7.71	57.87
6 Louis Dreyfus Company (U) Ltd	6	34,240	2,670	36,910	6.79	64.67
7 Touton Uganda Limited	8	27,393	5,270	32,663	6.01	70.68
8 Kampala Domestic Store Ltd	9	24,818		24,818	4.57	75.25
9 Ibero (U) Ltd	7	21,762		21,762	4.01	79.25
10 Besmark Coffee Company Limited	10	13,267	1,280	14,547	2.68	81.93
11 Export Trading Company (U) Ltd	13	12,490		12,490	2.30	84.23
12 Grainpulse Ltd	21	11,351	285	11,636	2.14	86.37
13 Ishaka Quality Commodities Ltd	30	10,520		10,520	1.94	88.31
14 The Edge Trading (U) Ltd	12	7,701	19	7,720	1.42	89.73
15 Nakana Coffee Factory Ltd	23	7,240		7,240	1.33	91.06
16 Ankole Coffee Producers Coop Union Ltd	18	5,890		5,890	1.08	92.15
17 Bakhsons Trading Co. (U) Ltd	14	4,580	320	4,900	0.90	93.05
18 Commodity Solutions (U) Ltd	19	4,468		4,468	0.82	93.87
19 Discovery Trading Limited	15	4,398		4,398	0.81	94.68
20 Darley Investments Ltd	22	4,194	70	4,264	0.78	95.46
21 Sena Indo Uganda Limited	24	3,110		3,110	0.57	96.04
22 Great Lakes Coffee Company Ltd	11		3,004	3,004	0.55	96.59
23 Tata Uganda Limited	20	3,000		3,000	0.55	97.14
24 Coffee World Ltd	16	2,762		2,762	0.51	97.65
25 Mbale Importers & Exporters Ltd	17	1,400	1,280	2,680	0.49	98.14
26 Kaweri Coffee Plantation	26	1,280		1,280	0.24	98.38
27 Rezlex Investment Ltd		1,280		1,280	0.24	98.62

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

EXPORTING COMPANY	POSITION HELD IN JUNE	QUANTITY (Bags)		Percentage Market Share		
		Robusta	Arabica	Total	Individual	Cumulative
28 Gisha Coffee Ltd	31	1,002		1,002	0.18	98.80
29 Kibinge Coffee Farmers' Coop Soc Ltd	27	960		960	0.18	98.98
30 Tariq General Suppliers Ltd			900	900	0.17	99.14
31 Africano Green Impex Ltd		668		668	0.12	99.26
32 Bakwanye Trading Co. Ltd			640	640	0.12	99.38
Nile Highland Arabica Coffee Farmers' Association.			640	640	0.12	99.50
33 Association.			640	640	0.12	99.50
34 Equatorial Beans Factory Ltd		120	431	551	0.10	99.60
35 Karaz Coffee Factory		350		350	0.06	99.67
36 Bukonzo Joint Co-operative Union Ltd	28		320	320	0.06	99.73
37 Funzo Coffee (U) Ltd		16	304	320	0.06	99.78
New Bukumbi Coffee Processors Limited			320	320	0.06	99.84
38 Limited			320	320	0.06	99.84
39 United Organic Coffee Growers Limited			320	320	0.06	99.90
40 Nucafe		250	30	280	0.05	99.95
41 Gumutindo Coffee Coop Enterprise Ltd	35		170	170	0.03	99.98
42 Carico Café Connoisseur Limited			82	82	0.02	100.00

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

DESTINATION	POSITION HELD IN JUNE	QUANTITY (60kg bags)			%AGE MARKET SHARE	
		Robusta	Arabica	Total	Individual	Cumulative
Total		467,160	76,091	543,251	100.00	
1 Italy	1	159,061	20,974	180,035	33.14	33.14
2 Sudan	2	127,200		127,200	23.41	56.55
3 Germany	3	44,759	13,592	58,351	10.74	67.30
4 Spain	6	25,486	2,880	28,366	5.22	72.52
5 Morocco	9	27,031		27,031	4.98	77.49
6 Belgium	4	20,010	6,762	26,772	4.93	82.42
7 India	5	18,989	1,510	20,499	3.77	86.19
8 United States	8	6,240	12,548	18,788	3.46	89.65
9 Russia	18	9,479	1,711	11,190	2.06	91.71
10 China	13	3,840	4,120	7,960	1.47	93.18
11 Israel	10	3,530	2,880	6,410	1.18	94.36
12 Portugal	12	4,996		4,996	0.92	95.28
13 South Korea	15	586	3,743	4,329	0.80	96.07
14 Netherlands	11	2,780	700	3,480	0.64	96.72
15 Kenya	21	1,210	1,030	2,240	0.41	97.13
16 Greece	22	1,774		1,774	0.33	97.45
17 Canada	16	1,280	320	1,600	0.29	97.75
18 Finland	18	1,280	320	1,600	0.29	98.04
19 Poland	27	360	1,080	1,440	0.27	98.31
22 United Kingdom	31	880	321	1,201	0.22	98.53
21 France	22	1,120		1,120	0.21	98.74
22 South Africa	25	960		960	0.18	98.91
23 Ukraine		940	20	960	0.18	99.09
24 Japan	19	940		940	0.17	99.26
25 Mexico	7	900		900	0.17	99.43
26 South Sudan			900	900	0.17	99.59
27 Egypt	29	668		668	0.12	99.72
28 Slovenia		540		540	0.10	99.82

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

DESTINATION	POSITION HELD IN JUNE	QUANTITY (60kg bags)			%AGE MARKET SHARE	
		Robusta	Arabica	Total	Individual	Cumulative
29 Australia	23		339	339	0.06	99.88
30 Albania			320	320	0.06	99.94
31 Saud Arabia			320	320	0.06	100.00
32 Switzerland		1	21	22	0.00	100.00

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

BUYERS	POSITION HELD IN JUNE	QUANTITY (60kg BAGS)			%AGE MARKET SHARE	
		Robusta	Arabica	Total	Individual	Cumulative
Total		467,160	76,091	543,251	100.00	
1 Sucafina	4	64,110	4,160	68,270	12.57	12.57
2 Olam International	1	58,447	7,057	65,504	12.06	24.62
3 Altasheel Import & Export	2	61,950		61,950	11.40	36.03
4 Volcafe	3	36,996	20,235	57,231	10.53	46.56
5 Ecom Agro Industrialist	6	22,576	9,590	32,166	5.92	52.48
6 Aldwami Co	8	24,150		24,150	4.45	56.93
7 Bernhard Rothfos	5	22,050		22,050	4.06	60.99
8 Cofftea	7	15,400		15,400	2.83	63.82
9 Luigi Lavazza	16	14,110		14,110	2.60	66.42
10 Pacorini Silocaf	19	8,880	4,755	13,635	2.51	68.93
11 Elmathahib	15	11,200		11,200	2.06	70.99
12 Hamburg Coffee	11	10,724		10,724	1.97	72.97
13 Strauss	13	4,665	5,579	10,244	1.89	74.85
14 Koninklijke Douwe		9,000		9,000	1.66	76.51
15 Louis Dreyfus	20	7,370	1,280	8,650	1.59	78.10
16 Grb	12		7,560	7,560	1.39	79.49
17 Jacobs Douwe Egberts	18	6,840		6,840	1.26	80.75
18 Bercher Coffee Consulting	9	5,084	1,280	6,364	1.17	81.92
19 Nkg Bero Italia	22	4,280		4,280	0.79	82.71
20 Alkokhi	28	4,200		4,200	0.77	83.48
21 Icona Café		3,056	640	3,696	0.68	84.16
22 Dek Berlin		3,600		3,600	0.66	84.83
23 Kunshan		2,880	640	3,520	0.65	85.48
24 Ste Benniscafe		3,284		3,284	0.60	86.08
25 Cafea		3,200		3,200	0.59	86.67
26 Tata Coffee	17	3,000		3,000	0.55	87.22
27 Comattir		2,880		2,880	0.53	87.75
28 Ccl Products	21	2,660		2,660	0.49	88.24
29 Touton Geneve	25	1,360	1,280	2,640	0.49	88.73
30 Others		49,208	12,035	61,243	11.27	100.00

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