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Key Highlights



A total of 506,470-kilo bags of coffee valued at US\$ 44.64 million were exported in September 2020 at an average weighted price of US\$ 1.47 /kilo, 1 cent lower than US\$ 1.48 /kilo in August 2020. This was an increase of 39.82% and 28.63% in quantity and value respectively compared to the same period last year.



Coffee exports for the coffee year (October 2019 to September 2020) totalled to 5,360,859 bags worth US\$ 512.23 million compared to 4,439,808 bags worth US\$ 433.95 million the previous year. This represents 21% and 18% increase in quantity and value respectively.



Farm-gate prices for Robusta Kiboko averaged UGX 2,100 per kilo; FAQ UGX 4,100 per kilo, Arabica parchment UGX 4,900 per kilo and Drugar UGX 4,250 per kilo.



78.01% of the total volume was exported by 10 exporters, out of 37 companies which performed during the month compared to 76.35% in August 2020, reflecting increasing concentration.

Wugar fetched the highest price at US \$ 2.70 per kilo.



The ICO Composite Indicator price increased by 1.3% to 116.25 US cents/lb in September 2020 from US cents/lb 114.78 in August 2020.

1. Coffee exports

Coffee exports in September 2020 amounted to 506,470 60-kilo bags worth US\$ 44.64 million as shown in Fig 1. This comprised 445,465 bags (US \$ 37.25 million) of Robusta and 61,009 bags (US\$ 7.39 million) of Arabica (see Table 1 and Annex 1). This was an increase of 39.82% and 28.78% in quantity and value respectively compared to the same month last year.

By comparing quantity of coffee exported by type in the same month of last Coffee Year (September 2019), Robusta increased in quantity by 43.30% and 28.63 in quantity and value respectively. Arabica exports also increased in both quantity and value by 18.80% and 29.56% respectively.

The increase in exports has been attributed to the increased production on account of fruition of the newly planted coffee, and favourable weather. That notwithstanding, Logistical issues such as lack of containers and delays of truck drivers a border posts somewhat affected movement of cargo.

Coffee exports for the 12 months (Coffee year 2019/20) amounted to 5,360,859 60-kilo bags worth US\$ 512.23 million compared to 4,439,808 60-kilo bags worth US\$ 433.95 million the previous year. This represents 20.75% and 18.04% increase in both quantity and value respectively. (figure 1)

Fig 1: Trend of Total Quantity and Value of Coffee Exported: October 2019- September 2020



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

Period/Coffee Type	2018/19		2019/20		%age Change	
	Qty(60-kgbag)	Value (US \$)	Qty(60-kgbag)	Value (US \$)	Qty(60-kgbag)	Value (US \$)
September Total	362,219	34,659,059	506,470	44,635,451	↑ 39.82	↑ 28.78
Robusta	310,863	28,956,041	445,461	37,246,525	↑ 43.30	↑ 28.63
Arabica	51,356	5,703,018	61,009	7,388,927	↑ 18.80	↑ 29.56

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 September 2020. The average export price was US\$ 1.47 per kilo, 1 cent lower than US\$ 1.48 per kilo realized last month. Robusta exports accounted for 88.95% of total exports compared to 88.11% in August 2020. The average Robusta price was US\$ 1.39 per kilo, the same as the previous month. Screen 14 fetched the highest price of US\$ 1.86 per kilo, a premium of 54 cents over Screen 12 and 38 cents over Screen 18. . and it was followed Organic Robusta sold at an average price of US\$ 1.84 per kilo, a premium of 42 cents over conventional Screen 18.

Low realized price of Screen 18 noted due to reported low demand for it by buyers and substantial stocks at exporter level Arabica fetched an average price of US\$ 2.02 per kilo, 11 cents lower than in August 2020. The highest price was for Wugar sold at US\$ 2.70 per kilo., followed by Bugisu AB, Bugisu A and Bugisu each sold at US\$ 2.62 per kilo. Drugar exports had a 61% share of Arabica exports compared to 30% the previous month.

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

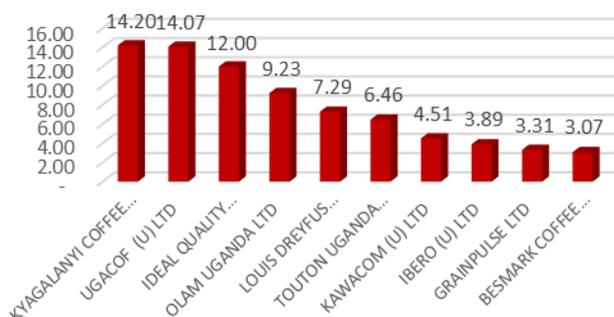
Coffee type	Quantity 60-Kilo Bags	%-age Quantity	Value in US \$	%-age Value	Unit Price US\$/Kilo
TOTAL	506,470		44,635,451		1.47
Organic Robusta	2,320	0.52	256,534	0.69	1.84
Washed Robusta	3,200	0.72	344,553	0.93	1.79
Screen 18	66,603	14.95	5,898,068	15.84	1.48
Screen 17	23,591	5.30	2,091,689	5.62	1.48
Screen 15	235,194	52.80	20,024,716	53.76	1.42
Screen 14	1,680	0.38	187,883	0.50	1.86
Screen 12	54,439	12.22	4,325,668	11.61	1.32
Bhp 1199	27,465	6.17	1,911,379	5.13	1.16
Other Robustas	30,969	6.95	2,206,036	5.92	1.19
Total Robusta	445,461	100.00	37,246,525	100.00	1.39
Organic Okoro	570	0.93	83,688	1.13	2.45
Sustainable Arabica	2,880	4.72	412,223	5.58	2.39
Mt Elgon A+	1,127	1.85	159,105	2.15	2.35
Bugisu A+	3,440	5.64	445,497	6.03	2.16
Bugisu AA	2,984	4.89	464,821	6.29	2.60
Bugisu AB	345	0.57	54,321	0.74	2.62
Bugisu A	87	0.14	13,692	0.19	2.62
Bugisu C/PB	740	1.21	87,326	1.18	1.97
Bugisu B	138	0.23	21,669	0.29	2.62
Mixed Arabica	1,330	2.18	126,906	1.72	1.59
Wugar	1,471	2.41	238,617	3.23	2.70
Drugar	37,036	60.71	4,496,072	60.85	2.02
Other Arabicas	8,861	14.52	784,990	10.62	1.48
Total Arabica	61,009	100.00	7,388,927	100.00	2.02

3. Individual Exporter Performance

Figure 2 shows the top 10 export companies in the month of September 2020. Kyagalanyi Coffee Ltd maintained the highest market share with 14.2 % compared to 11.20% last month. It was followed by Ugacof (U) Ltd 14.07% (12.39%); Ideal Quality Commodities Ltd 12.00% (12.06%); Olam Uganda Ltd 9.23% (6.77%) Louis Dreyfus Company (U) Ltd 7.29% (7.98%) Touton Uganda Limited 6.46% (5.58%); and Kawacom (U) Ltd 4.51% (6.76%).

The top 10 exporters held a market share of 78.01% compared to 76.35% the previous month. There were minor changes in positions compared to last month reflecting efficiency of exporters. Out of the 37 exporters that performed, 20 exported Robusta Coffee only while 4 exported Arabica coffee only. Annex 2 shows a detailed list of exporters performance in September 2020.*The figures in brackets represent percentage market share held in August 2020.

Figure 2: Top 10 Exporting Companies by percentage market share



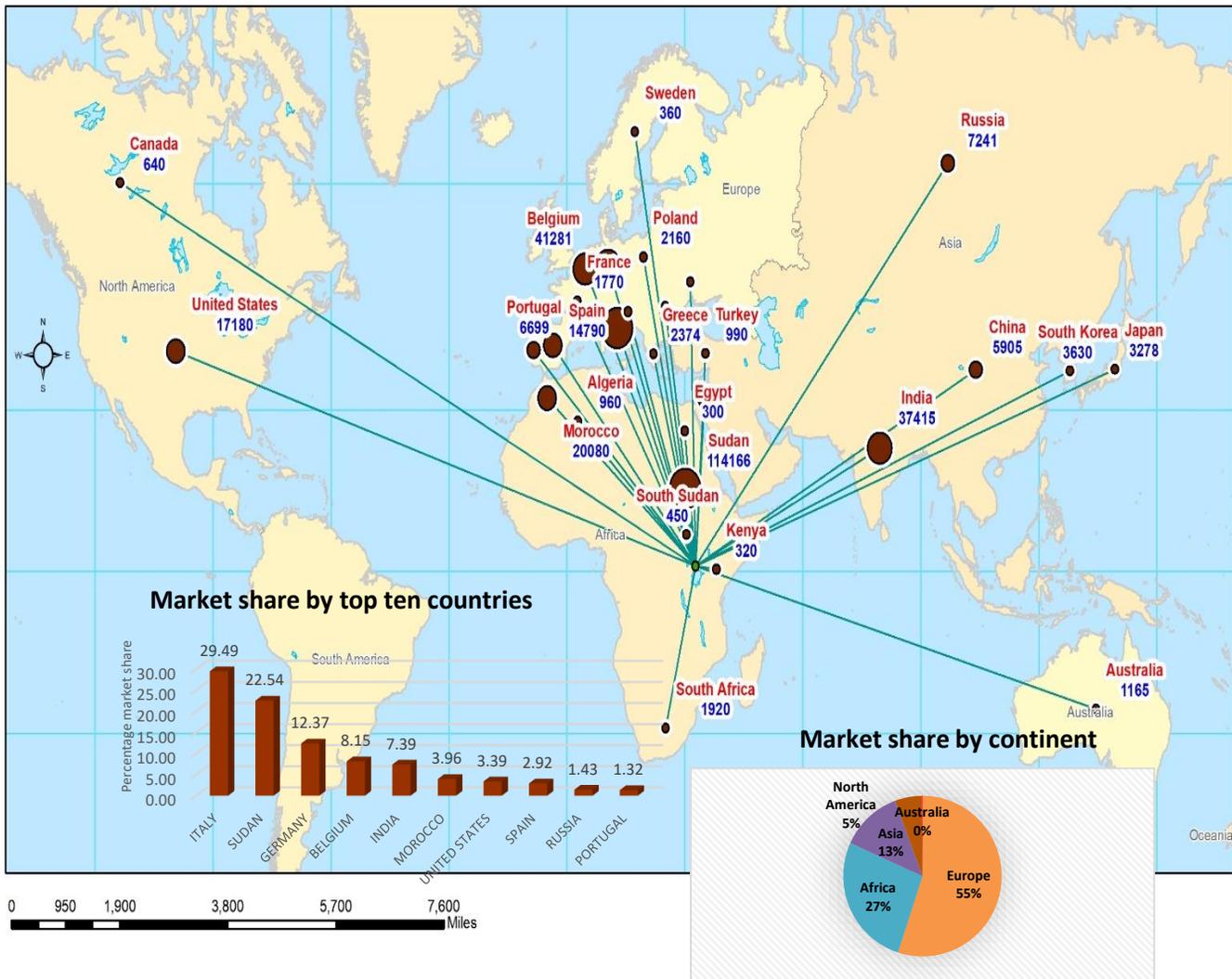
4. Foreign buyers of Uganda Coffee

Annex 4 shows a list of Ugandan coffee buyers in September 2020. The top 10 buyers held a market share of 61.62% of total exports, lower than 68.93% the previous month. Olam International led with a market share of 11.43% compared to 9.70% in August 2020. It was followed by Sucafina 11.31% (10.11%); Altasheel Import & Export Enterprises 9.26% (12.06%); Cofftea 6.86% (5.32%) Volcafe 6.76% (5.84%); Bernhard Rothfos 3.89% (4.26%). 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 –August 2020.*

5. Coffee Exports By Destination

The destinations of Uganda’s coffee exports during the month of September 2020 are shown in Fig 3 (details in Annex 3). Italy maintained the highest market share with 29.49% compared with 29.38% last month. It was followed by Sudan 22.54% (26.59%), Germany 12.37% (14.06%) Belgium 8.15% (5.12%) and India 7.39% (4.16%). Coffee exports to Africa amounted to 138,196 bags, a market share of 27.29% compared to 156,591 bags (27.23%) the previous month. Africa countries included Sudan, Morocco, Kenya, Algeria, Egypt and South Sudan. And contributed 27% of import share signifying continued continental trade under Af CTA. Europe remains the main destination for Uganda’s coffees with a 55% imports share. **The figures in brackets represent percentage market share held in August 2020.*

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



6. Global Situation

World coffee exports amounted to 10.04 million bags in August 2020, compared with 10.86 million in August 2019. Exports in the first 11 months of Coffee Year 2019/20 (Oct 2019 to August 2020) have decreased by 5.6% to 116.54 million bags compared to 123.44 million bags in the same period in 2018/19. The ICO Composite Indicator price increased by 1.3% to 116.25 US cents/lb in September 2020 from US cents/lb 114.78 in August 2020. Global coffee production for 2019/20 is estimated at 169.34 million bags versus consumption of 167.81 million bags. The Covid 19 pandemic continues to put pressure on the global economy hence limiting out of home coffee consumption.

7. Local Situation

During the month of September 2020, farm gate prices ranged from Sh.1,800 -2,200 per kilo of Kiboko (Robusta dry cherries); Shs. 3,900-4,400/= for FAQ; Sh. 5,200-5,700/= for Arabica parchment; and Sh. 5,000-5,500/= per kilo for Drugar from Kasese. Robusta Kiboko averaged UGX 2,000 per kilo; FAQ UGX 4,150 per kilo, Arabica parchment UGX 5,450/= per kilo and Drugar UGX 5,250 per kilo.

8. Coffee Development and Promotional Activities

During the month, coffee extension services across the country focused on surveillance for coffee pests/disease control; stakeholder sensitizations on good post harvest handling practices to prevent bad practices such as stripping during harvesting and adulteration by traders. Emphasis was also on rehabilitation and renovation (R&R) for better production and productivity. Elite coffee seedling distribution that commenced in mid July for Northern region was completed, although planting of Arabica continued in Zombo, Nebbi and Arua. In Elgon region, planting was completed for 7,042,550 seedlings out of 8,600,000 allocated. South Western also commenced planting of the 6,469,000 seedlings allocated; and so is Rwenzori region for the 9,030,000 Arabica seedlings and 50,750 plantlets of WDR clones. Country wide, especially in Central, Western and Northern regions, strong focus shifted to mobilizing farmers with idle land to plant coffee on commercial scale

9. Outlook for October 2020

Coffee exports are projected to be 400,000 bags as exporters await the main crop from Central and Eastern regions since the main harvesting season south of the Equator ended in September 2020..

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

Coffee Year	2019/20		2018/19		%age Change	
Coffee Year	2019/20		2018/19		%age Change	
	Quantity	Value \$	Quantity	Value \$	Quantity	Value \$
Grand Total	5,360,859	512,225,400	4,439,808	433,947,687	20.75	18.04
Total Robusta	4,395,683	382,715,754	3,471,850	320,419,807	26.61	19.44
Total Arabica	965,176	129,479,645	967,958	113,527,879	-0.29	14.05
September	506,470	44,635,451	362,219	34,659,059	39.82	28.78
Robusta	445,461	37,246,525	310,863	28,956,041	43.30	28.63
Arabica	61,009	7,388,927	51,356	5,703,018	18.80	29.56
August	519,683	46,060,119	488,864	46,314,058	6.30	-0.55
Robusta	457,897	38,158,356	414,940	38,089,869	10.35	0.18
Arabica	61,786	7,901,763	73,924	8,224,189	-16.42	-3.92
July	543,617	50,214,345	463,709	43,965,256	17.23	14.21
Robusta	467,526	40,229,539	386,584	35,338,116	20.94	13.84
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	34.38
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

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

EXPORTING COMPANY	POSITION HELD IN AUGUST	QUANTITY (Bags)		PERCENTAGE MARKET SHARE		
		Robusta	Arabica	Total	Individual	Cumulative
Total		445,461	61,009	506,470	100.00	
1 Kyagalanyi Coffee Ltd	1	62,930	8,974	71,904	14.20	14.20
2 Ugacof (U) Ltd	2	68,376	2,880	71,256	14.07	28.27
3 Ideal Quality Commodities Ltd	3	60,784		60,784	12.00	40.27
4 Olam Uganda Ltd	5	39,896	6,843	46,739	9.23	49.50
5 Louis Dreyfus Company (U) Ltd	4	26,268	10,630	36,898	7.29	56.78
6 Touton Uganda Limited	7	24,804	7,910	32,714	6.46	63.24
7 Kawacom (U) Ltd	6	14,490	8,330	22,820	4.51	67.75
8 Ibero (U) Ltd	8	18,581	1,097	19,678	3.89	71.63
9 Grainpulse Ltd	12	16,764		16,764	3.31	74.94
10 Besmark Coffee Company Limited	9	12,362	3,200	15,562	3.07	78.01
11 Export Trading Company (U) Ltd	13	15,170		15,170	3.00	81.01
12 Discovery Trading Limited	15	8,540		8,540	1.69	82.70
13 Great Lakes Coffee Company Ltd	22	2,720	5,574	8,294	1.64	84.33
14 Bakhsons Trading Co. (U) Ltd	17	7,018	900	7,918	1.56	85.90
15 Mbale Importers & Exporters Ltd	18	6,588	1,310	7,898	1.56	87.46
16 Commodity Solutions (U) Ltd	23	6,906		6,906	1.36	88.82
17 Sena Indo Uganda Limited	21	6,885		6,885	1.36	90.18
18 Ishaka Quality Commodities Ltd	14	6,818		6,818	1.35	91.53
19 Tata Uganda Limited	25	6,000		6,000	1.18	92.71
20 Nakana Coffee Factory Ltd	16	5,732		5,732	1.13	93.84
21 The Edge Trading (U) Ltd	11	5,250		5,250	1.04	94.88
22 Africano Green Impex Ltd	26	4,900		4,900	0.97	95.85
23 Kaweri Coffee Plantation	34	3,200		3,200	0.63	96.48
24 Kampala Domestic Store Ltd	10	3,150		3,150	0.62	97.10
25 Ankole Coffee Producers Coop Union Ltd	20	3,060		3,060	0.60	97.70
26 Coffee World Ltd	19	2,652		2,652	0.52	98.23
27 Darley Investments Ltd	24	1,644		1,644	0.32	98.55

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

EXPORTING COMPANY	POSITION HELD IN AUGUST	QUANTITY (Bags)		Percentage Market Share		
		Robusta	Arabica	Total	Individual	Cumulative
28 Bakwanye Trading Co. Ltd			1,600	1,600	0.32	98.87
29 Kibinge Coffee Farmers' Coop Soc Ltd		1,600		1,600	0.32	99.18
30 Tariq General Suppliers Ltd		700	450	1,150	0.23	99.41
31 Nucafe	28	720		720	0.14	99.55
32 United Organic Coffee Growers Limited			640	640	0.13	99.68
33 Karaz Coffee Factory	29	350		350	0.07	99.75
34 Africof Establishments Ltd	32	334		334	0.07	99.81
35 Bukonzo Joint Co-operative Union Ltd			320	320	0.06	99.88
36 Prime Coffee Limited	35		320	320	0.06	99.94
37 African Prime Fresh Producers		269	31	300	0.06	100.00

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

DESTINATION	POSITION HELD IN AUGUST	QUANTITY (60kg bags)			%AGE MARKET SHARE	
		Robusta	Arabica	Total	Individual	Cumulative
Total		445,461	61,009	506,470	100.00	
1 Italy	1	138,286	11,069	149,355	29.49	29.49
2 Sudan	2	114,166		114,166	22.54	52.03
3 Germany	3	50,386	12,270	62,656	12.37	64.40
4 Belgium	4	35,141	6,140	41,281	8.15	72.55
5 India	6	37,130	285	37,415	7.39	79.94
6 Morocco	7	18,160	1,920	20,080	3.96	83.90
7 United States	5	2,240	14,940	17,180	3.39	87.30
8 Spain	9	12,520	2,270	14,790	2.92	90.22
9 Russia	10	6,591	650	7,241	1.43	91.65
10 Portugal	15	6,699		6,699	1.32	92.97
11 Israel	11	4,500	1,920	6,420	1.27	94.24
12 China	8	5,585	320	5,905	1.17	95.40
13 South Korea	19	300	3,330	3,630	0.72	96.12
14 Japan	12	2,793	485	3,278	0.65	96.77
15 Greece	13	2,040	334	2,374	0.47	97.24
16 Poland	14	360	1,800	2,160	0.43	97.66
17 South Africa	17	1,600	320	1,920	0.38	98.04
18 France	22	1,770		1,770	0.35	98.39
19 Romania	24	1,215	350	1,565	0.31	98.70
22 Australia	30	320	845	1,165	0.23	98.93
21 Croatia	29	1,080		1,080	0.21	99.14
22 Turkey	27	670	320	990	0.20	99.34
23 Algeria	22	960		960	0.19	99.53
24 Canada	32		640	640	0.13	99.65
25 South Sudan			450	450	0.09	99.74
26 Sweden	25	360		360	0.07	99.81
27 Kenya	16		320	320	0.06	99.88
28 Ukraine		320		320	0.06	99.94
29 Egypt	21	269	31	300	0.06	100.00

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

BUYERS	POSITION HELD IN AUGUST	QUANTITY (60kg BAGS)			%AGE MARKET SHARE	
		Robusta	Arabica	Total	Individual	Cumulative
Total		445,461	61,009	506,470	100.00	
1 Olam International	3	51,066	6,843	57,909	11.43	11.43
2 Sucafina	2	54,383	2,880	57,263	11.31	22.74
3 Altasheel Import & Export	1	46,910		46,910	9.26	32.00
4 Cofftea	6	34,746		34,746	6.86	38.86
5 Volcafe	5	30,306	3,945	34,251	6.76	45.63
6 Bernhard Rothfos	8	18,581	1,097	19,678	3.89	49.51
7 Ecom Agro Industrialist	4	9,400	8,010	17,410	3.44	52.95
8 Strauss	12	9,800	5,920	15,720	3.10	56.05
9 Bercher Coffee Consulting	15	10,940	3,200	14,140	2.79	58.84
10 Pacorini Silocaf	13	10,543	3,530	14,073	2.78	61.62
11 Elmathahib	10	11,884		11,884	2.35	63.97
12 Luigi Lavazza	7	11,790		11,790	2.33	66.30
13 Tata Coffee Ltd	16	11,595		11,595	2.29	68.59
14 Jacobs Douwe Egberts	20	11,520		11,520	2.27	70.86
15 Hamburg Coffee	9	9,900	900	10,800	2.13	72.99
16 Indus Coffee	18	8,500		8,500	1.68	74.67
17 Louis Dreyfus	23	5,970	1,920	7,890	1.56	76.23
18 Touton Geneve	21	1,000	6,770	7,770	1.53	77.76
19 Tropical Gmbh		7,444		7,444	1.47	79.23
20 Koninklijke Douwe	11	6,480		6,480	1.28	80.51
21 Les Cafes		2,840	1,920	4,760	0.94	81.45
22 Nestle Espana		4,600		4,600	0.91	82.36
23 Nv Group Sopex	25	4,598		4,598	0.91	83.27
24 Guzman		3,436	990	4,426	0.87	84.14
25 Nkg Bero Italia		4,199		4,199	0.83	84.97
26 Mayasim Import	24	3,850		3,850	0.76	85.73
27	17	2,004	1,280	3,284	0.65	86.38
28 Mayasim		2,800		2,800	0.55	86.93
29 Aldwami Co	14	2,450		2,450	0.48	87.42
30 Others		51,926	11,804	63,730	12.58	100.00

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