

UCDA

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MINISTRY OF AGRICULTURE, ANIMAL INDUSTRIES AND FISHERIES



Key Highlights



A total of 428,015 kilo bags of coffee valued at US\$ 38.61 million were exported in October 2020 at an average weighted price of US\$ 1.50 /kilo, 3 cents higher than US\$ 1.47 /kilo in September 2020. This was an increase of 12.95% and 4.49% in quantity and value respectively compared to the same period last 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.



Coffee exports for 12 months (November 2019 to October 2020) totalled to 5,409,054 bags worth US\$ 513.99 million compared to 4,465,534 bags worth US\$ 435.81 million the previous year. This represents 21% and 18% increase in quantity and value respectively.



83.02% of the total volume was exported by 10 exporters, out of 34 companies which performed during the month compared to 78.01% in September 2020, reflecting increasing concentration.

Rwenzori A+ fetched the highest price at US \$ 7.01 per kilo.



The ICO Composite Indicator price decreased by 8.9% to 105.85 US cents/lb in October 2020 from US cents/lb 116.25 in September 2020.

1. Coffee exports

Coffee exports in October 2020 amounted to 428,015 60-kilo bags worth US\$ 38.61 million as shown in Fig 1. This comprised 371,280 bags (US \$ 30.97 million) of Robusta and 56,735 bags (US\$ 7.39 million) of Arabica (see Table 1 and Annex 1). This was an increase of 12.95% and 4.49% 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 (October 2019), Robusta increased by 22.36% and 10.13 in quantity and value respectively. Arabica exports decreased in both quantity and value by 24.86% and 13.44% respectively.

The increase in monthly exports compared to the previous year has been attributed to the increased production on account of fruition of the newly planted coffee as well as favourable weather. The export reduction from the previous month is expected since the main harvest south of the equator has ended.

Coffee exports for the 12 months (November 2019-October 2020) amounted to 5,409,054 60-kilo bags worth US\$ 513.99 million compared to 4,465,534 60-kilo bags valued at US\$ 435.81 million the previous year. This represents 21.13% and 17.94% increase in both quantity and value respectively. (figure 1)

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



Table1: Comparison of Coffee Exports of October 2019/20 and 2020/21 Coffee Years

Period/Coffee Type	2019/20		2020/21		%age Change	
	Qty(60-kgbag)	Value (US \$)	Qty(60-kgbag)	Value (US \$)	Qty(60-kgbag)	Value (US \$)
October Total	378,931	36,946,329	428,015	38,606,868	↑ 12.95	↑ 4.49
Robusta	303,430	28,119,329	371,280	30,966,600	↑ 22.36	↑ 10.13
Arabica	75,501	8,827,000	56,735	7,640,268	↓ -24.86	↓ -13.44

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 October 2020. The average export price was US\$ 1.50 per kilo, 3 cents higher than US\$ 1.47 per kilo realized last month. Robusta exports accounted for 86.74% of total exports compared to 87.97% in September 2020. The average Robusta price was US\$ 1.39 per kilo, the same as the previous month. Organic Robusta fetched the highest price of US\$ 1.85 per kilo, a premium of 36 over Screen 18, and it was followed Washed Robusta sold at an average price of US\$ 1.83 per kilo, a premium of 34 cents over conventional Screen 18.

Arabica fetched an average price of US\$ 2.24 per kilo, 22 cents higher than in September 2020. The highest price was for Mt. Rwenzori A+ sold at US\$ 7.01 per kilo., followed by Wugar sold at US\$ 3.18 per kilo, a premium of 51 cents over Bugisu AA.. Drugar exports had a 53% share of Arabica exports compared to 61% the previous month and was sold at US\$ 2.03 per kilo,, a discount of 64 cents from Bugisu AA.

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

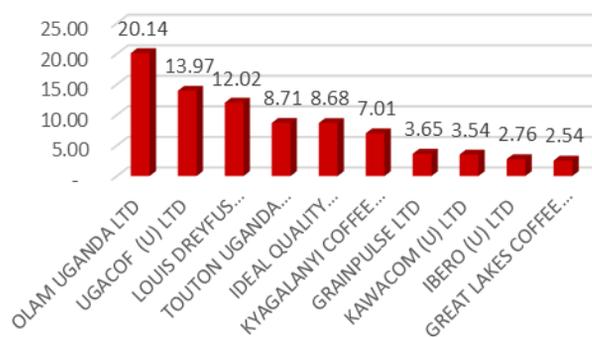
Coffee type	Quantity 60-Kilo Bags	%-age Quantity	Value in US \$	%-age Value	Unit Price US\$/Kilo
TOTAL	428,015		38,606,868		1.50
Organic Robusta	2,087	0.56	231,120	0.75	1.85
Washed Robusta	320	0.09	35,133	0.11	1.83
Screen 18	52,481	14.14	4,684,810	15.13	1.49
Screen 17	24,013	6.47	2,230,830	7.20	1.55
Screen 15	198,186	53.38	17,054,301	55.07	1.43
Screen 14	640	0.17	57,016	0.18	1.48
Screen 13	1,440	0.39	116,458	0.38	1.35
Screen 12	33,708	9.08	2,675,448	8.64	1.32
BHP 1199	38,252	10.30	2,502,649	8.08	1.09
Other Robustas	20,153	5.43	1,378,835	4.45	1.14
Total Robusta	371,280	100.00	30,966,600	100.00	1.39
Organic Okoro	960	1.69	132,657	1.74	2.30
Mt Elgon A+	3,328	5.87	494,471	6.47	2.48
Rwenzori A+	4	0.01	1,683	0.02	7.01
Rwenzori AA	262	0.46	37,775	0.49	2.40
Bugisu A+	640	1.13	82,921	1.09	2.16
Bugisu AA	10,850	19.12	1,736,040	22.72	2.67
Bugisu A	1,800	3.17	272,502	3.57	2.52
Bugisu AB	4,160	7.33	642,629	8.41	2.57
Mt Elgon A	999	1.76	141,936	1.86	2.37
Mixed Arabica	1,018	1.79	105,857	1.39	1.73
Wugar	677	1.19	129,062	1.69	3.18
Drugar	30,257	53.33	3,689,232	48.29	2.03
Other Arabicas	1,780	3.14	173,505	2.27	1.62
Total Arabica	56,735	100.00	7,640,268	100.00	2.24

3. Individual Exporter Performance

Figure 2 shows the top 10 export companies in the month of October 2020. Olam Uganda Ltd led the highest market share with 20.14% compared to 9.23% last month. It was followed by Ugacof (U) Ltd 13.97% (14.20%); Louis Dreyfus Company (U) Ltd 12.02% (7.29%); Touton Uganda Limited 8.71% (6.46%) Ideal Quality Commodities Ltd 8.68% (12.00%) Kyagalanyi Coffee Ltd 7.01% (14.20%); and Grain Pulse Ltd 3.65% (3.31%).

The top 10 exporters held a market share of 83.02% compared to 78.01% the previous month. There were changes in positions compared to last month reflecting competition at the exporter level. Out of the 34 exporters that performed, 19 exported Robusta Coffee only while 3 exported Arabica coffee only. Annex 2 shows a detailed list of exporters performance in October 2020.*The figures in brackets represent percentage market share held in September 2020.

Figure 2: Top 10 Exporting Companies by percentage market share

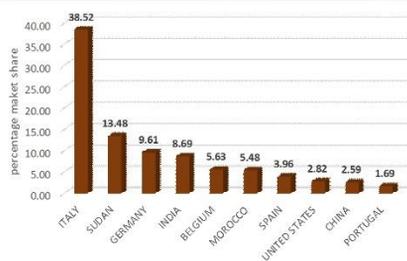
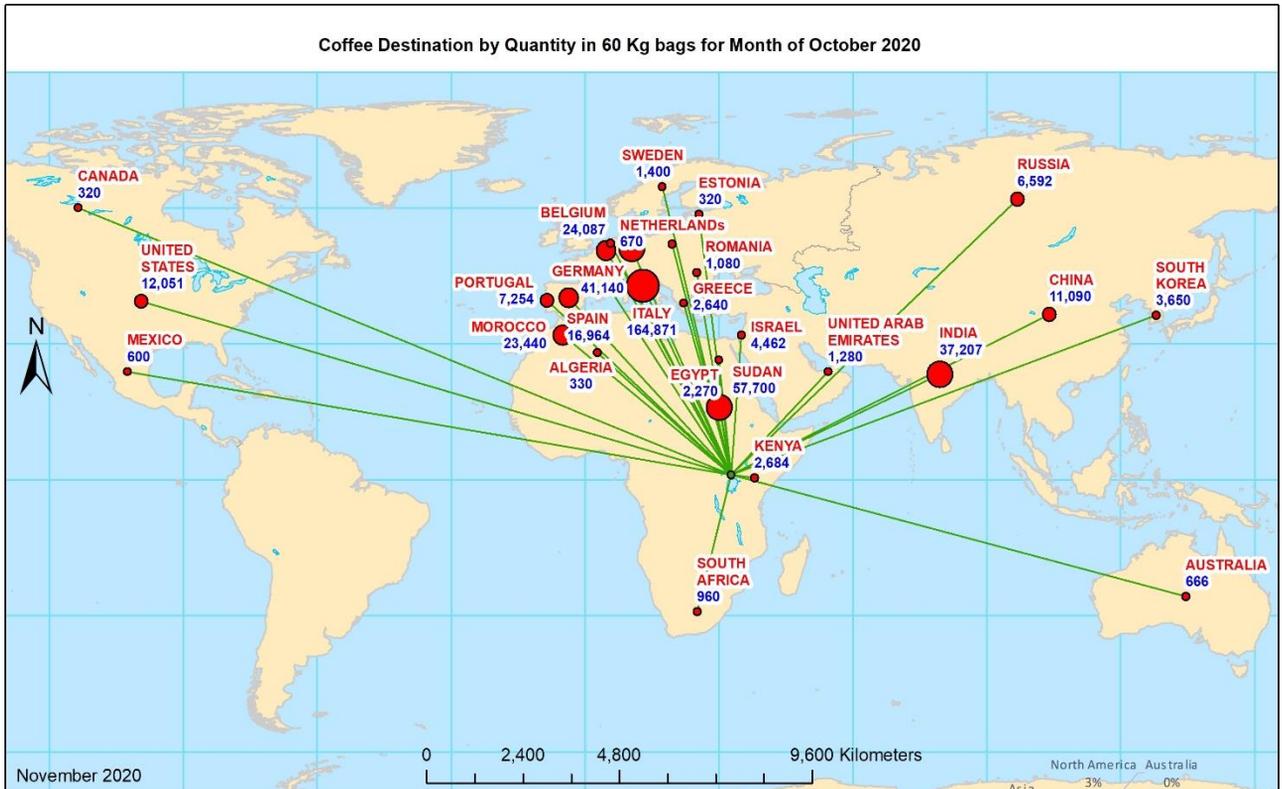


4. Foreign buyers of Uganda Coffee

Annex 4 shows a list of Ugandan coffee buyers in October 2020. The top 10 buyers held a market share of 63.30% of total exports, higher than 61.62% the previous month. Olam International led with a market share of 21.51% compared to 11.43% in September 2020. It was followed by Sucafina 12.88% (11.31%); Altasheel Import & Export Enterprises 7.85% (9.26%); Volcafe 4.01% (6.76%) Hamburg Coffee 3.41% (2.13%); Pacorini Silocaf 3.02% (2.78%). 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 –September 2020.*

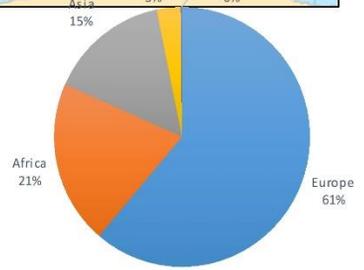
5. Coffee Exports By Destination

The destinations of Uganda’s coffee exports during the month of October 2020 are shown in Fig 3 (details in Annex 3). Italy maintained the highest market share with 38.52% compared with 29.49% last month. It was followed by Sudan 13.48% (22.54%), Germany 19.61% (12.37%) India 8.69% (7.39%) and Belgium 5.63% (8.15%). Coffee exports to Africa amounted to 87,384 bags, a market share of 20.42% compared to 138,196 bags (27.29%) the previous month. Africa countries included Sudan, Morocco, Kenya, Algeria, Egypt and South Africa. Europe remains the main destination for Uganda’s coffees with a 61% imports share. **The figures in brackets represent percentage market share held in September 2020.*



 **Robusta: 371,280**

 **Arabica: 56,735**



6. Global Situation

World coffee exports amounted to 10.16 million bags in September 2020, compared with 10.08 million in September 2019. Exports for the Coffee Year 2019/20 decreased by 4.9% to 126.90 million bags from 133.45 million bags in coffee year 2018/19. The ICO Composite Indicator price decreased by 8.9% to 105.85 US cents/lb in October 2020 from US cents/lb 116.25 in September 2020. Global coffee production for 2019/20 is estimated at 168.84 million bags versus consumption of 167.59 million bags. Demand for coffee is seen to be down due to the pressure from a global economic downturn and limited out of home coffee consumption as social distancing remains in place in many countries.

7. Local Situation

During the month of October 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. 5,200-5,600/= 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.

8. Coffee Development and Promotional Activities

All coffee regions experienced heavy to medium and stable rains during the month of October, which enhanced coffee ripening and good field crop performance especially for newly planted crop. Planting in new areas and gap filling after stumping continued in many parts of the country. In Eastern Region, a total of 6,645,000 coffee seedlings allocated were planted and likewise in Elgon where 8,600,000 Arabica seedlings were allocated for April –Aug. 2020 season. In South Western, planting also took place for the 8,349,000 seedling allocated, and over 17,650 old and unproductive coffee trees were stumped. Stakeholder engagement on good post harvest handling practices continued in South Western, Rwenzori, Western and Eastern regions. Elite coffee seedlings distribution that commenced in mid north closed in September and emphasis placed on farmer mobilization to enroll into cooperatives with the help of the district commercial officers in Zombo and Dokolo Districts. The major challenge recorded was the high cases of leaf rust, fungal root rot and collar rot especially in Western Uganda.

9. Outlook for November 2020

Coffee exports are projected to be 500,000 bags as exporters start procuring coffee from the main crop from Central and Eastern regions., the prevailing rains which will affect coffee drying and transport from the countryside not withstanding

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

EXPORTING COMPANY	POSITION HELD IN SEPTEMBER	QUANTITY (Bags)		PERCENTAGE MARKET SHARE		
		Robusta	Arabica	Total	Individual	Cumulative
Total		371,280	56,735	428,015	100.00	
1 Olam Uganda Ltd	4	71,494	14,720	86,214	20.14	20.14
2 Ugacof (U) Ltd	2	59,493	320	59,813	13.97	34.12
3 Louis Dreyfus Company (U) Ltd	5	45,003	6,424	51,427	12.02	46.13
4 Touton Uganda Limited	6	27,813	9,450	37,263	8.71	54.84
5 Ideal Quality Commodities Ltd	3	37,146		37,146	8.68	63.52
6 Kyagalanyi Coffee Ltd	1	23,494	6,507	30,001	7.01	70.53
7 Grainpulse Ltd	9	14,656	960	15,616	3.65	74.17
8 Kawacom (U) Ltd	7	11,681	3,462	15,143	3.54	77.71
9 Ibero (U) Ltd	8	11,832		11,832	2.76	80.48
10 Great Lakes Coffee Company Ltd	13	4,280	6,590	10,870	2.54	83.02
11 Bakhsons Trading Co. (U) Ltd	14	9,730		9,730	2.27	85.29
12 Export Trading Company (U) Ltd	11	7,040		7,040	1.64	86.94
13 Commodity Solutions (U) Ltd	16	6,882		6,882	1.61	88.54
14 Mbale Importers & Exporters Ltd	15	5,600	1,280	6,880	1.61	90.15
15 Ankole Coffee Producers Coop Union Ltd	25	5,156		5,156	1.20	91.35
16 Discovery Trading Limited	12	4,200		4,200	0.98	92.34
17 Sena Indo Uganda Limited	17	4,079		4,079	0.95	93.29
18 The Edge Trading (U) Ltd	21	3,468		3,468	0.81	94.10
19 Besmark Coffee Company Limited	10		3,200	3,200	0.75	94.85
20 Tata Uganda Limited	19	3,100		3,100	0.72	95.57
21 Darley Investments Ltd	27	640	2,240	2,880	0.67	96.24
22 Kampala Domestic Store Ltd	24	2,770		2,770	0.65	96.89
23 Ishaka Quality Commodities Ltd	18	2,570		2,570	0.60	97.49
24 Coffee World Ltd	26	1,990		1,990	0.46	97.96
25 JBER Coffee Ltd		1,750		1,750	0.41	98.37
26 Nakana Coffee Factory Ltd	20	1,666		1,666	0.39	98.75
27 Tariq General Suppliers Ltd	30	1,400		1,400	0.33	99.08

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

EXPORTING COMPANY	POSITION HELD IN SEPTEMBER	QUANTITY (Bags)			Percentage Market Share	
		Robusta	Arabica	Total	Individual	Cumulative
28 Nucafe	31	640	586	1,226	0.29	99.37
29 Africano Green Impex Ltd	22	1,050		1,050	0.25	99.61
30 Gisha Coffee Ltd			700	700	0.16	99.78
31 Africof Establishments Ltd	34	334		334	0.08	99.86
32 Kaweri Coffee Plantation		320		320	0.07	99.93
33 Gorilla Summit Coffee Development		3	228	231	0.05	99.98
34 Gumutindo Coffee Coop Enterprise Ltd			68	68	0.02	100.00

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

DESTINATION	POSITION HELD IN SEPTEMBER	QUANTITY (60kg bags)			%AGE MARKET SHARE	
		Robusta	Arabica	Total	Individual	Cumulative
Total		371,280	56,735	428,015	100.00	
1 Italy	1	158,943	5,928	164,871	38.52	38.52
2 Sudan	2	57,700		57,700	13.48	52.00
3 Germany	3	25,590	15,550	41,140	9.61	61.61
4 India	5	36,647	560	37,207	8.69	70.31
5 Belgium	4	13,465	10,622	24,087	5.63	75.93
6 Morocco	6	23,440		23,440	5.48	81.41
7 Spain	8	15,970	994	16,964	3.96	85.37
8 United States	7	1,003	11,048	12,051	2.82	88.19
9 China	12	10,770	320	11,090	2.59	90.78
10 Portugal	10	4,257	2,997	7,254	1.69	92.47
11 Russia	9	6,592		6,592	1.54	94.01
12 Israel	11	3,560	902	4,462	1.04	95.06
13 South Korea	13		3,650	3,650	0.85	95.91
14 Kenya	27	120	2,564	2,684	0.63	96.54
15 Greece	15	2,640		2,640	0.62	97.15
16 Egypt	29	2,270		2,270	0.53	97.68
17 Sweden	26	1,400		1,400	0.33	98.01
18 Dubai		1,280		1,280	0.30	98.31
19 Romania	19	1,080		1,080	0.25	98.56
22 Poland	16	360	640	1,000	0.23	98.80
21 South Africa	17	640	320	960	0.22	99.02
22 Saud Arabia		700		700	0.16	99.18
23 Netherlands		670		670	0.16	99.34
24 Australia	22	666		666	0.16	99.50
25 Mexico		600		600	0.14	99.64
26 France	18	570		570	0.13	99.77
27 Algeria	23	330		330	0.08	99.85
28 Canada	24		320	320	0.07	99.92
29 Estonia			320	320	0.07	100.00
30 Switzerland		17		17	0.00	100.00

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

BUYERS	POSITION HELD IN SEPTEMBER	QUANTITY (60kg BAGS)			%AGE MARKET SHARE	
		Robusta	Arabica	Total	Individual	Cumulative
Total		371,280	56,735	428,015	100.00	
1 Olam International	1	76,652	15,420	92,072	21.51	21.51
2 Sucafina	2	54,813	320	55,133	12.88	34.39
3 Altasheel Import & Export	3	33,600		33,600	7.85	42.24
4 Volcafe	5	13,495	3,657	17,152	4.01	46.25
5 Hamburg Coffee	15	13,956	640	14,596	3.41	49.66
6 Pacorini Silocaf	10	11,888	1,050	12,938	3.02	52.68
7 Bernhard Rothfos	6	12,822		12,822	3.00	55.68
8 Touton Geneve	18	3,240	9,450	12,690	2.96	58.64
9 Koninklijke Douwe	20	10,054		10,054	2.35	60.99
10 Louis Dreyfus	17	8,280	1,600	9,880	2.31	63.30
11 Ecom Agro Industrialist	7	6,614	2,808	9,422	2.20	65.50
12 Cofftea	4	8,400		8,400	1.96	67.46
13 China National Chemical Fiber		8,320		8,320	1.94	69.41
14 Strauss	8	6,450	960	7,410	1.73	71.14
15 Tata Coffee Ltd	13	6,925		6,925	1.62	72.76
16 Icona Café	27	5,994	720	6,714	1.57	74.33
17 Jacobs Douwe Egberts	14	6,000		6,000	1.40	75.73
18 CCL Products		5,850		5,850	1.37	77.09
19 Nkg Bero Italia	25	4,026		4,026	0.94	78.04
20 Societe Des Cafes		3,938		3,938	0.92	78.96
21 Chiara Fazio		3,500		3,500	0.82	79.77
22 Indus Coffee	16	2,900	560	3,460	0.81	80.58
23 Bercher Coffee Consulting	9		3,200	3,200	0.75	81.33
24 Elmathahib	11	3,150		3,150	0.74	82.07
25 Luigi Lavazza	12	3,150		3,150	0.74	82.80
26 Geodis		3,060		3,060	0.71	83.52
27 Falcon Commodities			2,880	2,880	0.67	84.19
28 Aldwami Co	29	2,800		2,800	0.65	84.84
29 Zephyr Green Coffee			2,560	2,560	0.60	85.44
30 Others		51,403	10,910	62,313	14.56	100.00

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