

# UCDA

MONTHLY REPORT-NOVEMBER 2020

## Key Highlights



A total of 430,324 kilo bags of coffee valued at US\$ 38.29 million were exported in November 2020 at an average weighted price of US\$ 1.48 /kilo, 2 cents lower than US\$ 1.50 /kilo in October 2020. This was a decrease of 2.09% and 9.42% 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 3,900 per kilo, Arabica parchment UGX 5,250 per kilo and Drugar UGX 5,000 per kilo.



Coffee exports for 12 months (December 2019 to November 2020) totalled to 5,399,851 bags worth US\$ 510.02 million compared to 4,503,592 bags worth US\$ 436.98 million the previous year. This represents 20% and 17% increase in quantity and value respectively.



72.88% of the total volume was exported by 10 exporters, out of 33 companies which performed during the month compared to 83.02% in October 2020, reflecting reduced concentration.

Bugisu A fetched the highest price at US \$ 3.04 per kilo.



The ICO Composite Indicator price increased by 3.6% to 109.70 US cents/lb in November 2020 from US cents/lb 105.85 in October 2020.

## 1. Coffee exports

Coffee exports in November 2020 amounted to 430,324 60-kilo bags worth US\$ 38.61 million as shown in Fig 1. This comprised 372,211 bags (US \$ 30.55 million) of Robusta and 58,113 bags (US\$ 7.74 million) of Arabica (see Table 1 and Annex 1). This was a decrease of 2.09% and 9.42% 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 (November 2019), Robusta increased by 10.66% and 0.42% in quantity and value respectively. Arabica exports decreased in both quantity and value by 43.66% and 34.67% respectively.

The reduction in monthly export compared to the previous year has been attributed mostly to the off-year biennial cycle characteristic of Arabica production. Increasing Robusta exports during the month was on account of fruition of the newly planted coffee as well as favourable weather. The export increase from the previous month is attributed to the intensification of the harvesting period in Central and Eastern regions expected to peak in December 2020 and January 2021.

Coffee exports for the 12 months (December 2019-November 2020) amounted to 5,399,851 60-kilo bags worth US\$ 510.02 million compared to 4,503,592 60-kilo bags valued at US\$ 436.98 million the previous year. This represents 19.90% and 16.71% increase in both quantity and value respectively. (figure 1)

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



Table1: Comparison of Coffee Exports of November 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 \$)
<b>November Total</b>	439,505	42,266,045	430,324	38,286,600	↓ -2.09	↓ -9.42
Robusta	336,366	30,420,946	372,211	30,548,107	↑ 10.66	↑ 0.42
Arabica	103,139	11,845,098	58,113	7,738,494	↓ -43.66	↓ -34.67

## 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 November 2020. The average export price was US\$ 1.48 per kilo, 2 cents lower than US\$ 1.50 per kilo realized last month. Robusta exports accounted for 86.50% of total exports almost same as 86.74% in October 2020. The average Robusta price was US\$ 1.37 per kilo, 3 cents lower than the previous month. Washed Robusta fetched the highest price of US\$ 1.83 per kilo, a premium of 35 over Screen 18, and it was followed Screen 18 sold at an average price of US\$ 1.48 per kilo.

Arabica fetched an average price of US\$ 2.22 per kilo, 2 cents lower than in October 2020. The highest price was for Bugisu A sold at US\$ 3.04 per kilo., followed by Sustainable Arabica FW Sipi Falls sold at US\$ 2.76 per kilo. Drugar exports had a 45% share of Arabica exports compared to 53% the previous month and was sold at US\$ 1.95 per kilo., a discount of 63 cents from Bugisu AA.

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

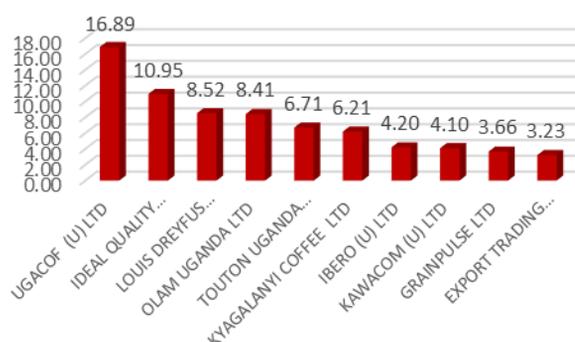
Coffee type	Quantity 60-Kilo Bags	%-age Quantity	Value in US \$	%-age Value	Unit Price US\$/Kilo
<b>TOTAL</b>	<b>430,324</b>		<b>38,286,600</b>		<b>1.48</b>
Washed Robusta	2,890	0.78	317,740	1.04	1.83
Screen 18	60,617	16.29	5,385,427	17.63	1.48
Screen 17	15,846	4.26	1,371,229	4.49	1.44
Screen 15	189,458	50.90	15,916,515	52.10	1.40
Screen 14	1,180	0.32	102,548	0.34	1.45
Screen 13	3,519	0.95	267,336	0.88	1.27
Screen 12	50,566	13.59	3,952,559	12.94	1.30
BHP 1199	28,035	7.53	1,789,813	5.86	1.06
Other Robustas	20,100	5.40	1,444,939	4.73	1.20
<b>Total Robusta</b>	<b>372,211</b>	<b>100.00</b>	<b>30,548,107</b>	<b>100.00</b>	<b>1.37</b>
Sustainable Arabica FW Sipi Falls	700	1.20	116,112	1.50	2.76
Okoro A+	320	0.55	52,889	0.68	2.75
Mt Elgon A+	6,919	11.91	1,018,780	13.17	2.45
Bugisu AA	6,979	12.01	1,065,396	13.77	2.54
Bugisu A	640	1.10	116,826	1.51	3.04
Bugisu AB	5,498	9.46	808,270	10.44	2.45
Bugisu PB	5	0.01	661	0.01	2.20
Bugisu C	2,560	4.41	395,516	5.11	2.57
Wugar	4,230	7.28	690,251	8.92	2.72
Drugar	26,252	45.17	3,005,728	38.84	1.91
Other Arabicas	4,010	6.90	468,063	6.05	1.95
<b>Total Arabica</b>	<b>58,113</b>	<b>100.00</b>	<b>7,738,494</b>	<b>100.00</b>	<b>2.22</b>

## 3. Individual Exporter Performance

Figure 2 shows the top 10 export companies in the month of November 2020. Ugacof (U) Ltd led the highest market share with 16.89% compared to 13.97% last month. It was followed by Ideal Quality Commodities Ltd 10.95% (8.68%); Louis Dreyfus Company (U) Ltd 8.52% (12.02%); Olam Uganda Limited 8.41% (20.14%) Touton Uganda Ltd 6.71% (8.71%) Kyagalanyi Coffee Ltd 6.21% (7.1%); and Ibero (U) Ltd 4.20% (2.76%). \*The figures in brackets represent percentage market share held in October 2020.

The top 10 exporters held a market share of 73% compared to 83% the previous month, reflecting reduced concentration. There were changes in positions compared to last month reflecting competition at the exporter level. Out of the 33 exporters that performed, 16 exported Robusta Coffee while 4 exported Arabica coffee only. Annex 2 shows a detailed list of exporters performance in November 2020

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

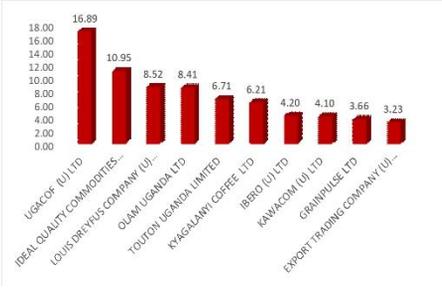
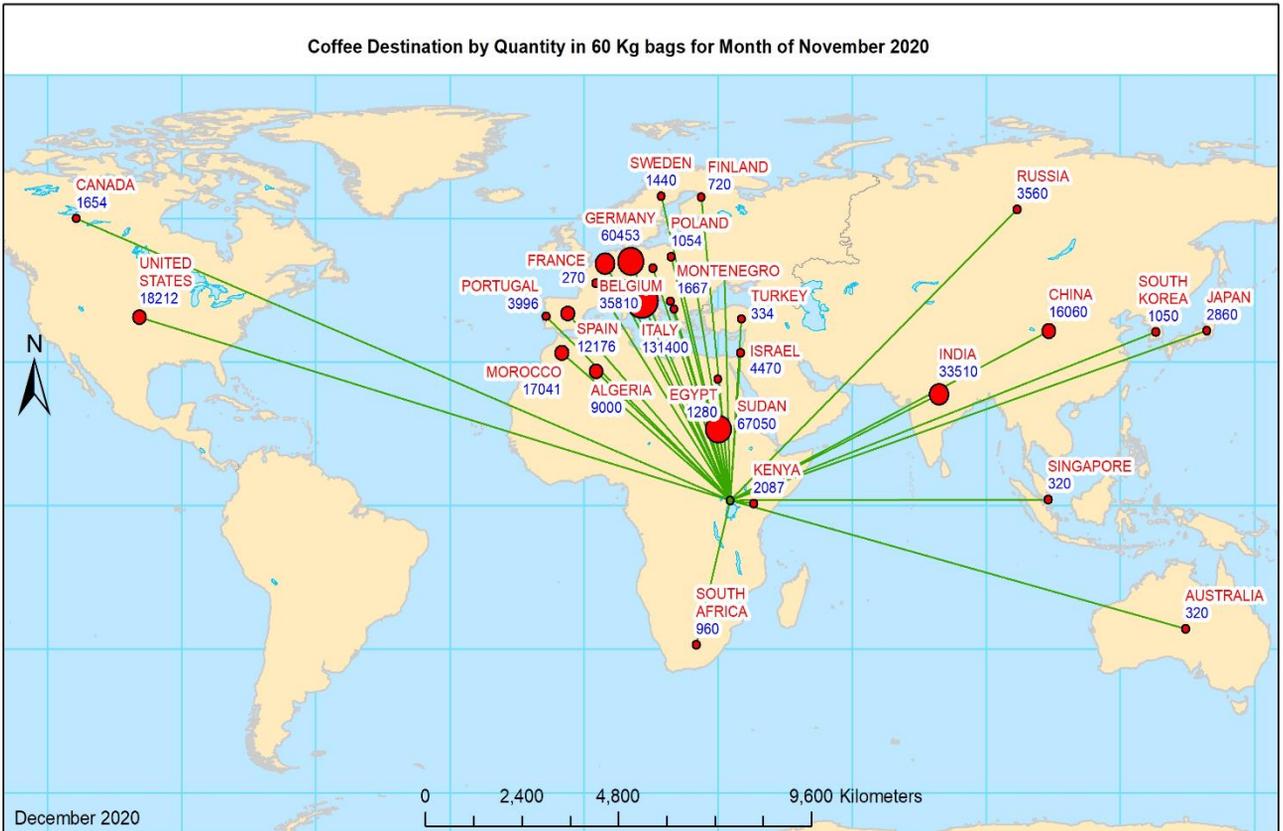


#### 4. Foreign buyers of Uganda Coffee

Annex 4 shows a list of Ugandan coffee buyers in November 2020. The top 10 buyers held a market share of 61.77% of total exports, lower than 63.30% the previous month. Sucafina led with a market share of 15.66% compared to 12.88% in October 2020. It was followed by Olam International 10.52% (21.51%); Altasheel Import & Export Enterprises 9.27% (7.85%); Bernhard Rothfos 5.42% (3.00%); Volcafe 5.21% (4.01%); Hamburg Coffee 3.49% (3.41%); Touton 3.44% (2.96%); Ecom Agro Industrialist 3.06% (2.20%) and CCL Products 2.93% (1.37%). Minimal changes in relative position compared to the previous month reflect market consolidation of major buyers of Uganda coffee. *Note: The figures in brackets represent percentage performance in the previous month –October 2020.*

#### 5. Coffee Exports By Destination

The destinations of Uganda’s coffee exports during the month of November 2020 are shown in the figure below (details in Annex 3). Italy maintained the highest market share with 30.54% compared with 38.52% last month. It was followed by Sudan 15.58% (13.48%), Germany 14.05% (9.61%) Belgium 8.32% (5.63%) and India 7.79% (8.69%). Coffee exports to Africa amounted to 97,418 bags, a market share of 22.64% compared to 87,384 bags (20.42%) the previous month. African countries included Sudan, Morocco, Kenya, Algeria, Egypt and South Africa, reflecting increased continental trade. Europe remains the main destination for Uganda’s coffees with a 58% imports share. *\*The figures in brackets represent percentage market share held in October 2020.*



**Robusta: 372,211**

**Arabica: 58,113**

## 6. Global Situation

World coffee exports amounted to 9.7 million bags in October 2020, compared with 9.4 million in October 2019. Exports for 12 months (November 2019-October 2020) decreased by 3.7% to 127.5 million bags from 132.45 million bags the previous period (November 2018-October 2019). The ICO Composite Indicator price increased by 3.6% to 109.70 US cents/lb in November 2020 from US cents/lb 105.85 in October 2020. Global coffee production for 2019/20 is estimated at 168.55 million bags versus consumption of 167.59 million bags. A delayed start of Vietnam's harvest and concerns over the prolonged drought in Brazil and damage by hurricanes in Central America boosted the prices.

## 7. Local Situation

During the month of November 2020, farm gate prices ranged from Sh.1,800 -2,200 per kilo of Kiboko (Robusta dry cherries); Shs. 3,800-4,000/= for FAQ; Sh. 5,000-5,500/= for Arabica parchment; and Sh. 4,800-5,300/= per kilo for Drugar from Kasese. Robusta Kiboko averaged UGX 2,000 per kilo; FAQ UGX 3,900 per kilo, Arabica parchment UGX 5,250/= per kilo and Drugar UGX 5,050 per kilo.

## 8. Coffee Development and Promotional Activities

All coffee regions experienced heavy to medium and stable rains during the month which enhanced coffee ripening and good field crop performance especially for newly planted crop. As a result, planting in new areas and gap filling after stumping continued in many parts of the country. A total of 102,050 CWDr plantlets distributed for establishment of field demo gardens were planted during the month in Hoima, Masindi, Kassanda, Sheema, Mbarara, Mubende and in Greater Masaka. Coffee rehabilitation and renovation continued across the country with a total of 47,221 coffee trees stumped. Stakeholder engagement on good post-harvest handling practices continued in regions especially those where harvesting was taking place. Farmers were sensitized on pre harvest, harvest and post-harvest preparation to ensure good quality of coffee during this harvesting season. The major challenge recorded was high incidence of leaf rust, fungal root rot and collar rot especially in Western Uganda. The prolonged rains affected coffee drying during the harvesting season especially in South West.

## 9. Outlook for December 2020

Coffee exports are projected to be 500,000 bags as the main harvesting period in Central and Eastern regions peaks with farmers expected to release stocks to cater for Christmas festive season. This would be compounded by drier weather which will facilitate movement of coffee from the countryside.

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

Coffee Year	2019/20		2020/21		%age Change	
Coffee Year	2019/20		2018/19		%age Change	
	Quantity	Value \$	Quantity	Value \$	Quantity	Value \$
<b>Grand Total</b>	<b>818,436</b>	<b>79,212,374</b>	<b>858,317</b>	<b>76,901,102</b>	<b>4.87</b>	<b>-2.92</b>
<b>Total Robusta</b>	<b>639,796</b>	<b>58,540,275</b>	<b>743,469</b>	<b>61,484,224</b>	<b>16.20</b>	<b>5.03</b>
<b>Total Arabica</b>	<b>178,640</b>	<b>20,672,098</b>	<b>114,848</b>	<b>15,416,878</b>	<b>-35.71</b>	<b>-25.42</b>
<b>November</b>	439,505	42,266,045	430,324	38,286,600	-2.09	-9.42
Robusta	336,366	30,420,946	372,211	30,548,107	10.66	0.42
Arabica	103,139	11,845,098	58,113	7,738,494	-43.66	-34.67
<b>October</b>	<b>378,931</b>	<b>36,946,329</b>	<b>427,993</b>	<b>38,614,502</b>	<b>12.95</b>	<b>4.52</b>
Robusta	303,430	28,119,329	371,258	30,936,117	22.35	10.02
Arabica	75,501	8,827,000	56,735	7,678,384	-24.86	-13.01

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

EXPORTING COMPANY	POSITION HELD IN OCTOBER	QUANTITY (Bags)			PERCENTAGE MARKET SHARE	
		Robusta	Arabica	Total	Individual	Cumulative
<b>Total</b>		<b>372,211</b>	<b>58,113</b>	<b>430,324</b>	<b>100.00</b>	
1 Ugacof (U) Ltd	2	71,792	890	72,682	16.89	16.89
2 Ideal Quality Commodities Ltd	5	47,138		47,138	10.95	27.84
3 Louis Dreyfus Company (U) Ltd	3	34,917	1,750	36,667	8.52	36.36
4 Olam Uganda Ltd	1	26,686	9,498	36,184	8.41	44.77
5 Touton Uganda Limited	4	24,020	4,870	28,890	6.71	51.49
6 Kyagalanyi Coffee Ltd	6	12,028	14,679	26,707	6.21	57.69
7 Ibero (U) Ltd	9	18,056		18,056	4.20	61.89
8 Kawacom (U) Ltd	8	14,054	3,594	17,648	4.10	65.99
9 Grainpulse Ltd	7	15,763		15,763	3.66	69.65
10 Export Trading Company (U) Ltd	12	13,880		13,880	3.23	72.88
11 Commodity Solutions (U) Ltd	13	11,798	1,920	13,718	3.19	76.07
12 Besmark Coffee Company Limited	19	2,672	9,600	12,272	2.85	78.92
13 Mbale Importers & Exporters Ltd	14	8,308	2,804	11,112	2.58	81.50
14 Sena Indo Uganda Limited	17	10,078		10,078	2.34	83.84
15 Kampala Domestic Store Ltd	22	9,036	200	9,236	2.15	85.99
16 Bakhsons Trading Co. (U) Ltd	11	8,736		8,736	2.03	88.02
17 Great Lakes Coffee Company Ltd	10	3,480	4,210	7,690	1.79	89.81
18 Discovery Trading Limited	16	6,700		6,700	1.56	91.36
19 The Edge Trading (U) Ltd	18	5,761	18	5,779	1.34	92.71
20 Darley Investments Ltd	21	4,184	1,280	5,464	1.27	93.98
21 Coffee World Ltd	24	4,766		4,766	1.11	95.08
22 Tata Uganda Limited	20	4,580		4,580	1.06	96.15
23 JBER Coffee Ltd	25	3,500		3,500	0.81	96.96
24 Nakana Coffee Factory Ltd	26	2,768		2,768	0.64	97.60
25 Kaweri Coffee Plantation	32	2,560		2,560	0.59	98.20
26 Ishaka Quality Commodities Ltd	23	2,280		2,280	0.53	98.73
27 Ankole Coffee Producers Coop Union Ltd	15	1,680		1,680	0.39	99.12

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

EXPORTING COMPANY	POSITION HELD IN OCTOBER	QUANTITY (Bags)			Percentage Market Share	
		Robusta	Arabica	Total	Individual	Cumulative
28 Bukonzo Joint Co-operative Union Ltd			960	960	0.22	99.34
29 Tariq General Suppliers Ltd	27		900	900	0.21	99.55
30 Bakwanye Trading Co. Ltd			640	640	0.15	99.70
31 Kibinge Coffee Farmers' Coop Soc Ltd		640		640	0.15	99.85
32 Nucafe	28	350		350	0.08	99.93
33 Bufumbo Organic Farmers Association			300	300	0.07	100.00

Annex 3: Main Destinations of Uganda Coffee by Type in November 2020						
Destination	Position Held in October	Quantity (60kg bags)			%Age Market Share	
		Robusta	Arabica	Total	Individual	Cumulative
Total		372,211	58,113	430,324	100.00	
1 Italy	1	126,096	5,304	131,400	30.54	30.54
2 Sudan	2	66,150	900	67,050	15.58	46.12
3 Germany	3	43,923	16,530	60,453	14.05	60.16
4 Belgium	5	21,990	13,820	35,810	8.32	68.49
5 India	4	33,510		33,510	7.79	76.27
6 United States	8	9,040	9,172	18,212	4.23	80.51
7 Morocco	6	17,041		17,041	3.96	84.47
8 China	9	13,700	2,360	16,060	3.73	88.20
9 Spain	7	12,176		12,176	2.83	91.03
10 Algeria	27	9,000		9,000	2.09	93.12
11 Israel	12	2,930	1,540	4,470	1.04	94.16
12 Portugal	10	2,997	999	3,996	0.93	95.09
13 Russia	11	2,920	640	3,560	0.83	95.91
14 Japan		1,320	1,540	2,860	0.66	96.58
15 Kenya	14	807	1,280	2,087	0.48	97.06
16 Montenegro		1,667		1,667	0.39	97.45
17 Canada	28	988	666	1,654	0.38	97.83
18 Sweden	17	720	720	1,440	0.33	98.17
19 Egypt	16	1,280		1,280	0.30	98.47
20 Poland	22	334	720	1,054	0.24	98.71
21 South Korea	13		1,050	1,050	0.24	98.96
22 South Africa	21	960		960	0.22	99.18
23 Finland			720	720	0.17	99.35
24 Romania	19	720		720	0.17	99.51
25 Albania		334		334	0.08	99.59
26 Turkey		334		334	0.08	99.67
27 Australia	24	320		320	0.07	99.74
28 Singapore		320		320	0.07	99.82
29 Ukraine		320		320	0.07	99.89
30 France		270		270	0.06	99.95
31 Czech Republic		34	134	168	0.04	99.99
32 Switzerland	30	10	18	28	0.01	100.00

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

BUYERS	POSITION HELD IN OCTOBER	QUANTITY (60kg BAGS)			%AGE MARKET SHARE	
		Robusta	Arabica	Total	Individual	Cumulative
<b>Total</b>		<b>372,211</b>	<b>58,113</b>	<b>430,324</b>	<b>100.00</b>	
1 Sucafina	2	66,738	640	67,378	15.66	15.66
2 Olam International	1	34,414	10,858	45,272	10.52	26.18
3 Altasheel Import & Export	3	39,900		39,900	9.27	35.45
4 Bernhard Rothfos	7	20,366	2,970	23,336	5.42	40.87
5 Volcafe	4	11,619	10,799	22,418	5.21	46.08
6 Hamburg Coffee	5	15,032		15,032	3.49	49.58
7 Touton Geneve	8	10,240	4,550	14,790	3.44	53.01
8 Ecom Agro Industrialist	11	9,924	3,260	13,184	3.06	56.08
9 CCL Products	18	12,600		12,600	2.93	59.00
10 Bercher Coffee Consulting	23	2,310	9,600	11,910	2.77	61.77
11 Tata Coffee Ltd	15	10,850		10,850	2.52	64.29
12 Pacorini Silocaf	6	9,550	1,050	10,600	2.46	66.76
13 Icona Café	16	9,442	360	9,802	2.28	69.03
14 China National Chemical Fiber	13	7,680	320	8,000	1.86	70.89
15 Aldwami Co	28	7,350		7,350	1.71	72.60
16 Jacobs Douwe Egberts	17	6,660		6,660	1.55	74.15
17 Elmathahib	24	6,300		6,300	1.46	75.61
18 Nkg Bero Italia	19	5,360		5,360	1.25	76.86
19 Louis Dreyfus	10	4,910		4,910	1.14	78.00
20 Mayasim		4,900		4,900	1.14	79.14
21 Strauss	14	2,580	2,014	4,594	1.07	80.21
22 Sarl Sodplus		4,200		4,200	0.98	81.18
23 Etc Export		3,600		3,600	0.84	82.02
24 Koninklijke Douwe	9	3,600		3,600	0.84	82.86
25 Geodis Ff	26	3,510		3,510	0.82	83.67
26 Centro Servizi		3,400		3,400	0.79	84.46
27 Ste Habycaf S.A		3,344		3,344	0.78	85.24
28 Tropical Gmbh		3,228		3,228	0.75	85.99
29 Guzman		3,106		3,106	0.72	86.71
30 Others		45,498	11,692	57,190	13.29	100.00

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