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MINISTRY OF AGRICULTURE, ANIMAL INDUSTRIES AND FISHERIES



Uganda Coffee Development Authority

## Key Highlights



A total of 422,922-kilo bags of coffee valued at US\$ 37.78 million were exported in December 2020 at an average weighted price of US\$ 1.49 /kilo, 1 cent higher than US\$ 1.48 /kilo in November 2020. This was an increase of 28.06% and 18.57% 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 5,300 per kilo and Drugar UGX 5,250 per kilo.



Coffee exports for calendar year (January 2020 to December 2020) totalled to 5,492,525 bags worth US 515.94 million compared to 4,519,563 bags worth US\$ 436.54 million the previous year. This represents 22% and 18% increase in quantity and value respectively.



74.35% of the total volume was exported by 10 exporters, out of 39 companies which performed during the month compared to 72.88% in November 2020, reflecting reduced concentration.

Organic Bugisu fetched the highest price at US \$ 2.94 per kilo.



The ICO Composite Indicator price increased by 4.6% to 114.74 US cents/lb in December 2020 from US cents/lb 109.70 in November 2020.

## 1. Coffee exports

Coffee exports in December 2020 amounted to 422,922 60-kilo bags worth US\$ 37.78 million as shown in Fig 1. This comprised 375,209 bags (US \$ 30.87 million) of Robusta and 47,713 bags (US\$ 6.92 million) of Arabica (see Table 1 and Annex 1). This was an increase of 28.06% 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 (December 2019), Robusta increased by 33.72% and 23.51% in quantity and value respectively. Arabica exports decreased in both quantity and value by 3.89% and 0.86% 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.

Coffee exports for the 12 months (January 2020-December 2020) amounted to 5,492,525 60-kilo bags worth US\$ 515.94 million compared to 4,519,563-kilo bags valued at US\$ 436.54 million the previous year. This represents 21.53% and 18.19% increase in both quantity and value respectively (Figure 1).

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



Table1: Comparison of Coffee Exports of December 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>December Total</b>	330,248	31,868,091	422,922	37,784,664	↑ 28.06	↑ 18.57
Robusta	280,603	24,990,250	375,209	30,866,603	↑ 33.72	↑ 23.51
Arabica	49,645	6,977,841	47,713	6,918,061	↓ -3.89	↓ -0.86

## 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 December 2020. The average export price was US\$ 1.49 per kilo, 1 cent higher than US\$ 1.48 per kilo realized last month. Robusta exports accounted for 88.72% of total exports higher than 86.50% in November 2020. The average Robusta price was US\$ 1.37 per kilo, the same as the previous month. Screen 15 (Fairtrade organic) fetched the highest price of US\$ 2.23 per kilo, a premium of 76 over Screen 18, and it was followed by Washed Robusta sold at an average price of US\$ 1.54 per kilo.

Arabica fetched an average price of US\$ 2.42 per kilo, 20 cents higher than in November 2020. The highest price was for Organic Bugisu sold at US\$ 2.94 per kilo., followed by Organic Wugar sold at US\$ 2.78 per kilo. Drugar exports had a 19.43% share of Arabica exports compared to 45% the previous month and was sold at US\$ 1.99 per kilo., a discount of 66 cents from Bugisu AA.

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

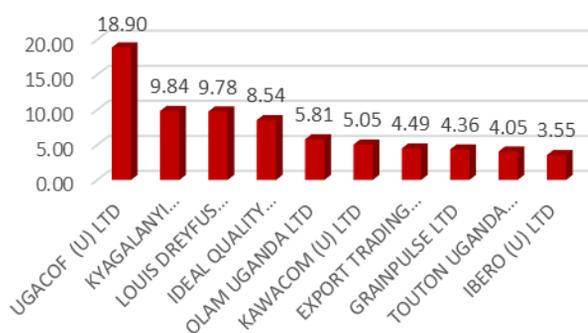
Coffee type	Quantity 60-Kilo Bags	%-age Quantity	Value in US \$	%-age Value	Unit Price US\$/Kilo
<b>TOTAL</b>	<b>422,922</b>		<b>37,784,664</b>		<b>1.49</b>
WASHED ROBUSTA	266	0.07	24,630	0.08	1.54
Screen 15 FAIR TRADE ORGANIC	1,400	0.37	187,038	0.61	2.23
Screen 18	43,579	11.61	3,846,500	12.46	1.47
Screen 17	30,254	8.06	2,697,171	8.74	1.49
Screen 15	189,000	50.37	15,892,570	51.49	1.40
SCREEN 14	960	0.26	86,743	0.28	1.51
Screen 12	61,598	16.42	4,861,760	15.75	1.32
BHP 1199	27,470	7.32	1,831,558	5.93	1.11
Other Robustas	20,682	5.51	1,438,634	4.66	1.16
<b>Total Robusta</b>	<b>375,209</b>	<b>100.00</b>	<b>30,866,603</b>	<b>100.00</b>	<b>1.37</b>
Organic Bugisu	932	1.95	164,229	2.37	2.94
ORGANIC OKORO	640	1.34	100,318	1.45	2.61
ORG WUGAR	760	1.59	126,928	1.83	2.78
OKORO A+	320	0.67	52,889	0.76	2.75
MT ELGON A+	8,468	17.75	1,320,920	19.09	2.60
Bugisu A+	4,800	10.06	709,296	10.25	2.46
Bugisu AA	4,784	10.03	761,849	11.01	2.65
Bugisu AB	6,808	14.27	1,043,118	15.08	2.55
BUgisu C	1,630	3.42	243,962	3.53	2.49
Wugar	5,868	12.30	953,238	13.78	2.71
Drugar	9,267	19.42	1,108,658	16.03	1.99
Other Arabicas	3,436	7.20	332,655	4.81	1.61
<b>Total Arabica</b>	<b>47,713</b>	<b>100.00</b>	<b>6,918,061</b>	<b>100.00</b>	<b>2.42</b>

## 3. Individual Exporter Performance

Figure 2 shows the top 10 export companies in the month of December 2020. Ugacof (U) Ltd led the highest market share with 18.90% compared to 16.89% last month. It was followed by Kyagalanyi Coffee Ltd 9.84% (6.21%); Louis Dreyfus Company (U) Ltd 9.78% (8.52%); Ideal Quality Commodities Ltd 8.54% (10.95%) Olam Uganda Limited 5.81% (8.41%); Kawacom (U) Ltd 5.05% (8.71%); Export Trading Company (U) Ltd 4.49% (3.23%); and Grainpile Ltd 4.36% (3.66%). \*The figures in brackets represent percentage market share held in November 2020

The top 10 exporters held a market share of 74% compared to 73% the previous month. There were changes in positions compared to last month reflecting competition at the exporter level. Out of the 39 exporters that performed, 19 exported Robusta Coffee only while 8 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**



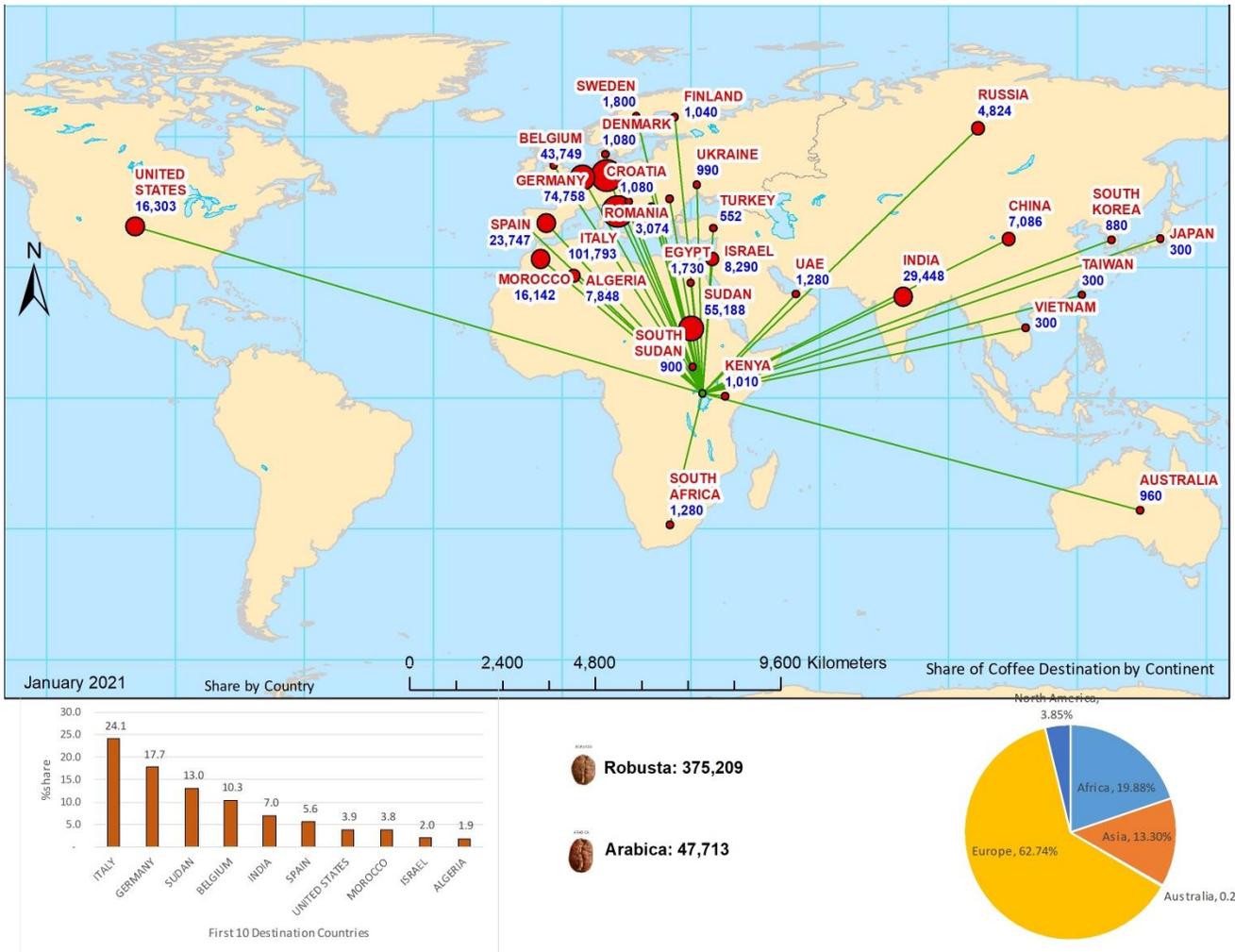
#### 4. Foreign buyers of Uganda Coffee

Annex 4 shows a list of Ugandan coffee buyers in December 2020. The top 10 buyers held a market share of 59.06% of total exports, lower than 61.77% the previous month. Sucafina led with a market share of 18.97% compared to 15.66% in November 2020. It was followed by Olam International 8.30% (10.52%); Altasheel Import & Export Enterprises 6.78% (9.27%); Ecom Agro Industrialist 4.98% (3.06%); Volcafe 4.69% (5.21%); Bernhard Rothfos 3.49% (3.41%); Icona Cafe 3.87% (2.28%); Aldwami Company 2.79% (1.71%) Elmathahib 2.48% (1.46%) and Strauss Commodities 2.33% (1.07%). Minimal changes in relative position compared to the previous month reflect market consolidation of major buyers of Uganda coffee. \* The figures in brackets represent percentage performance in the previous month November 2020.

#### 5. Coffee Exports By Destination

The destinations of Uganda's coffee exports during the month of December 2020 are shown in Figure 3 (details in Annex 3). Italy maintained the highest market share with 24.07% compared with 30.54% last month. It was followed by Germany 17.68% (14.05%), Sudan 13.05% (15.58%) Belgium 10.34% (8.32%) and India 6.96% (7.79%). Coffee exports to Africa amounted to 84,098 bags, a market share of 19.88% compared to 97,418 bags (22.64%) the previous month. African countries included Sudan, Morocco, Kenya, Algeria, Egypt South Africa and South Sudan reflecting increased continental trade. Europe remained the main destination for Uganda's coffees with a 63% imports share. \*The figures in brackets represent percentage market share held in November 2020.

Figure 3. December Coffee Destination in 60Kg bags



## 6. Global Situation

World coffee exports amounted to 10.15 million bags in November 2020, compared with 9.6 million in November 2019. Exports for the first 2 months of 2020/21 coffee year (October-November 2020) increased by 6.5% to 20.20 million bags from 18.97 million bags the previous period (October-November 2019/ 2020). The ICO Composite Indicator price increased by 4.6% to 114.74 US cents/lb in December 2020 from US cents/lb 109.70 in November 2020. The prices had support from sustained demand and the depreciation of the US dollar. Global coffee production for 2019/20 is estimated at 168.55 million bags versus consumption of 167.59 million bags.

## 7. Local Situation

During the month of December 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. 5,000-5,600/= 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 4,000 per kilo; Arabica parchment UGX 5,300/= per kilo and Drugar UGX 5,250 per kilo.

## 8. Coffee Development and Promotional Activities

During the month of December, intermittent rains were received especially in Western, South Western and the Lake Victoria Basin while some regions entered the dry season with light showers experienced in the first two weeks of the month. This enhanced coffee ripening and also good field crop performance with the new coffee plantings having a 75% survival rate. Rehabilitation and renovation of coffee continued with 30,539 trees totalling to 68 acres stumped in western and South western regions. Harvesting of coffee continued in some regions and sensitization on good harvesting and post-harvest handling practices was conducted especially in Kassanda, Mubende and Kakumiro districts. Training of Sub-County Agricultural Officers and farmers in coffee specific knowledge continued across the regions. Extension workers in Sheema, Kabale, Rukiga and Rubirizi districts comprising of 90 participants (67 males and 23 females) were trained. The prevalence of Coffee leaf rust, Coffee berry disease and Stem borers was widespread across Rwenzori and Elgon regions while the Tailed caterpillars and the Black Coffee Twig Borer (BCTB) remains the major pests in the Robusta growing areas. Pest surveys in Central Uganda showed that the main pests are tailed caterpillars (20.4%), BCTB (20.2%) and leaf skeletonizers (16.0%). Results showed that red blister disease (incidence= 51.6%and Severity= 1.9) and brown eye spot (incidence= 47% and severity =1) are the main diseases in central Uganda.

## 9. Outlook for January 2020

Coffee exports are projected to be 400,000 bags as the main harvesting period in Central and Eastern regions peaks. This would be compounded by drier weather which will facilitate drying and 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	Quantity	Value \$	Quantity	Value \$	Quantity	Value \$
<b>Grand Total</b>	<b>1,148,684</b>	<b>111,080,465</b>	<b>1,281,239</b>	<b>114,685,766</b>	<b>11.54</b>	<b>3.25</b>
<b>Total Robusta</b>	<b>920,399</b>	<b>83,530,525</b>	<b>1,118,678</b>	<b>92,350,827</b>	<b>21.54</b>	<b>10.56</b>
<b>Total Arabica</b>	<b>228,285</b>	<b>27,649,939</b>	<b>162,561</b>	<b>22,334,939</b>	<b>-28.79</b>	<b>-19.22</b>
<b>December</b>	<b>330,248</b>	<b>31,868,091</b>	<b>422,922</b>	<b>37,784,664</b>	<b>28.06</b>	<b>18.57</b>
Robusta	280,603	24,990,250	375,209	30,866,603	33.72	23.51
Arabica	49,645	6,977,841	47,713	6,918,061	-3.89	-0.86
<b>November</b>	<b>439,505</b>	<b>42,266,045</b>	<b>430,324</b>	<b>38,286,600</b>	<b>-2.09</b>	<b>-9.42</b>
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: December 2020

EXPORTING COMPANY	POSITION HELD IN NOVEMBER	QUANTITY (Bags)			PERCENTAGE MARKET SHARE	
		Robusta	Arabica	Total	Individual	Cumulative
<b>Total</b>		<b>375,209</b>	<b>47,713</b>	<b>422,922</b>	<b>100.00</b>	
1 Ugacof (U) Ltd	1	77,359	2,560	79,919	18.90	18.90
2 Kyagalanyi Coffee Factory Ltd	6	23,144	18,467	41,611	9.84	28.74
3 Louis Dreyfus Company (U) Ltd	3	41,010	333	41,343	9.78	38.51
4 Ideal Quality Commodities Ltd	2	36,118		36,118	8.54	47.05
5 Olam Uganda Ltd	4	18,318	6,238	24,556	5.81	52.86
6 Kawacom (U) Ltd	8	14,526	6,830	21,356	5.05	57.91
7 Export Trading Company (U) Ltd	10	18,990		18,990	4.49	62.40
8 Grainpulse Ltd	9	17,429	990	18,419	4.36	66.75
9 Touton Uganda Limited	5	15,384	1,750	17,134	4.05	70.80
10 Ibero (U) Ltd	7	15,006		15,006	3.55	74.35
11 Kampala Domestic Store Ltd	15	11,298		11,298	2.67	77.02
12 Bakhsons Trading Co. (U) Ltd	16	10,658		10,658	2.52	79.54
13 Tata Uganda Limited	22	8,520		8,520	2.01	81.56
14 Besmark Coffee Company Limited	12	6,720	1,660	8,380	1.98	83.54
15 Coffee World Ltd	21	8,028	307	8,335	1.97	85.51
16 Sena Indo Uganda Limited	14	7,440		7,440	1.76	87.27
17 Ishaka Quality Commodities Ltd	26	6,510		6,510	1.54	88.81
18 Mbale Importers & Exporters Ltd	13	4,168	2,160	6,328	1.50	90.31
19 Great Lakes Coffee Company Ltd	17	3,348	2,962	6,310	1.49	91.80
20 Zigoti Coffee Works Ltd		6,004		6,004	1.42	93.22
21 Commodity Solutions (U) Ltd	11	5,310	330	5,640	1.33	94.55
22 Ankole Coffee Producers Coop Union Ltd	27	5,250		5,250	1.24	95.79
23 The Edge Trading (U) Ltd	19	4,200		4,200	0.99	96.78
24 Discovery Trading Limited	18	3,850		3,850	0.91	97.70
25 Nakana Coffee Factory Ltd	24	2,383		2,383	0.56	98.26
26 Darley Investments Ltd	20	2,254		2,254	0.53	98.79
27 Tariq General Suppliers Ltd	29		900	900	0.21	99.00

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

EXPORTING COMPANY	POSITION HELD IN NOVEMBER	QUANTITY (Bags)		Percentage Market Share		
		Robusta	Arabica	Total	Individual	Cumulative
28 Kibinge Coffee Farmers' Coop Soc Ltd	31	680	680		0.16	99.17
29 Karaz Coffee Factory		668	668		0.16	99.32
30 Bufumbo Organic Farmers Association			350 350		0.08	99.41
31 Gisha Coffee Ltd			350 350		0.08	99.49
32 Hermes Coffee Factory Ltd			334 334		0.08	99.57
33 Bakwanye Trading Co. Ltd	30		320 320		0.08	99.64
34 Bukonzo Joint Co-operative Union Ltd	28		320 320		0.08	99.72
Bukonzo Organic Farmers Cooperative 35 Union			320 320		0.08	99.79
36 Central Coffee Farmers Association		320	320		0.08	99.87
37 Kaweri Coffee Plantation	25	266	266		0.06	99.93
38 Superbia International Coffee Trade Ltd			232 232		0.05	99.99
39 Masaka Cooperative Union Ltd		50	50		0.01	100.00

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

DESTINATION	POSITION HELD IN NOVEMBER	QUANTITY (60kg bags)			%AGE MARKET SHARE	
		Robusta	Arabica	Total	Individual	Cumulative
Total		375,209	47,713	422,922	100.00	
1 Italy	1	100,163	1,630	101,793	24.07	24.07
2 Germany	3	60,309	14,449	74,758	17.68	41.75
3 Sudan	2	55,188		55,188	13.05	54.79
4 Belgium	4	40,224	3,525	43,749	10.34	65.14
5 India	5	29,448		29,448	6.96	72.10
6 Spain	9	23,413	334	23,747	5.61	77.72
7 United States	6	5,920	10,383	16,303	3.85	81.57
8 Morocco	7	15,476	666	16,142	3.82	85.39
9 Israel	11	4,800	3,490	8,290	1.96	87.35
10 Algeria	10	7,848		7,848	1.86	89.20
11 China	8	3,520	3,566	7,086	1.68	90.88
12 Greece		6,600		6,600	1.56	92.44
13 Russia	13	4,490	334	4,824	1.14	93.58
14 Portugal	12	3,640		3,640	0.86	94.44
15 Romania	24	2,420	654	3,074	0.73	95.17
16 Sweden	18		1,800	1,800	0.43	95.59
17 Egypt	19	1,380	350	1,730	0.41	96.00
18 Qarta		1,280		1,280	0.30	96.31
19 South Africa	22	1,280		1,280	0.30	96.61
20 United Arab Emirates		960	320	1280	0.30	96.91
21 Croatia		1,080		1,080	0.26	97.17
22 Denmark		1,080		1,080	0.26	97.42
23 Poland	20	1,050		1,050	0.25	97.67
24 Finland	23	320	720	1,040	0.25	97.92
25 Kenya	15	50	960	1,010	0.24	98.16
26 Ukraine	29	990		990	0.23	98.39
27 Australia	27	320	640	960	0.23	98.62

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

Destination	Position Held In November	QUANTITY (60kg Bags)			%Age Market Share	
		Robusta	Arabica	Total	Individual	Cumulative
28 United Kingdom		320	640	960	0.23	98.84
29 South Sudan			900	900	0.21	99.06
30 South Korea	21		880	880	0.21	99.26
31 Oman			700	700	0.17	99.43
32 France			640	640	0.15	99.58
33 Turkey	26	320	232	552	0.13	99.71
34 Serbia		320		320	0.08	99.79
35 Japan	14		300	300	0.07	99.86
36 Taiwan			300	300	0.07	99.93
37 Vietnam		300		300	0.07	100.00

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

BUYERS	POSITION HELD IN NOVEMBER	QUANTITY (60kg BAGS)			%AGE MARKET SHARE	
		Robusta	Arabica	Total	Individual	Cumulative
<b>Total</b>		<b>375,209</b>	<b>47,713</b>	<b>422,922</b>	<b>100.00</b>	
1 Sucafina	1	77,669	2,560	80,229	18.97	18.97
2 Olam International	2	25,658	9,448	35,106	8.30	27.27
3 Altasheel Import & Export	3	28,688		28,688	6.78	34.05
4 Ecom Agro Industrialist	8	15,849	5,202	21,051	4.98	39.03
5 Volcafe	5	14,288	5,534	19,822	4.69	43.72
6 Bernhard Rothfos	4	16,036	330	16,366	3.87	47.59
7 Icona Café	13	15,999	360	16,359	3.87	51.46
8 Aldwami Co	15	11,800		11,800	2.79	54.25
9 Elmathahib	17	10,500		10,500	2.48	56.73
10 Strauss Commodities	21	5,400	4,454	9,854	2.33	59.06
11 Molenbergnatie Sa		9,170		9,170	2.17	61.23
12 Luigi Lavazza		8,950		8,950	2.12	63.34
13 CCL Products	9	7,650		7,650	1.81	65.15
14 Nv Group Sopex		6,708		6,708	1.59	66.74
15 Hamburg Coffee	6	5,582		5,582	1.32	68.06
16 Tata Coffee India Ltd	11	5,440		5,440	1.29	69.34
17 Bercher Coffee Consulting	10	4,104	960	5,064	1.20	70.54
18 Jacobs Douwe Egberts	16	5,040		5,040	1.19	71.73
19 Molenbergnatie		4,560	333	4,893	1.16	72.89
20 Schwarze & Consort Gmbh		4,640		4,640	1.10	73.99
21 Ibericafe Import S.L		4,480		4,480	1.06	75.05
22 Ned Coffee B.V		4,034		4,034	0.95	76.00
23 Pacorini Silocaf	12	3,940		3,940	0.93	76.93
24 Mayasim Import & Export	20	3,850		3,850	0.91	77.84
25 N V Group Sopex		3,662		3,662	0.87	78.71
26 Koninklijke Douwe	24	3,600		3,600	0.85	79.56
27 Etc Trading	23	3,500		3,500	0.83	80.39
28 Cafes Du Bois		3,200		3,200	0.76	81.14
29 Melitta		3,150		3,150	0.74	81.89
30 Others		58,062	18,532	76,594	18.11	100.00

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