UCDA

MONTHLY REPORT-MARCH 2022

Key Highlights



A total of 478,023 60-kilo bags of coffee valued at US\$ 80.99 million were exported in March 2022 at an average weighted price of US\$ 2.82 /kilo, 14 cents higher than US\$ 2.68 /kilo in February 2022 and US\$ 1.26 higher than US\$ 1.56/kilo in March 2021. This was a decrease of 16% in quantity and an increase of 51% in value compared to the same month last year.



MINISTRY OF AGRICULTURE, ANII

Farm-gate prices for Robusta Kiboko averaged UGX 2,750 per kilo; FAQ UGX 6,550 per kilo, Arabica parchment UGX 10,500 per kilo and Drugar UGX 9,500 per kilo.



Coffee exports for 12 months (April 2021-March 2022) totaled 6.52 million bags worth US 790.33 million compared to 5.65 million bags worth US\$ 522.91 million the previous year (April 2020-March 2021). This represents an increase of 15% and 51% in both quantity and value respectively.

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87% of the total volume was exported by 10 exporters, out of 44 companies which performed during the month, compared to 79% in February 2022.

Sustainable Arabica Fully washed Sipi Falls fetched the highest price at US \$ 5.42 per kilo. The share of sustainable Arabica exports to total Arabica exports was 20% reflecting increased uptake of sustainable coffees.



The ICO Composite Indicator price decreased by 7.6% to US Cents/lb 194.78 down from 210.89 US cents/lb. in February 2022.

1. Coffee exports

Coffee exports in March 2022 amounted to 478,023 60-kilo bags worth US\$ 80.99 million as shown in Fig 1. This comprised 360,229 bags of Robusta valued at US \$48.94 million and 117,798 bags of Arabica valued at US\$ 32.05 million (see Table 1 and Annex 1). This was a decrease of 16.40% in quantity but an increase of 51.44% in value compared to the same month

By comparing quantity of coffee exported by type in the same month of last Coffee Year (March 2021), Robusta decreased by 26.96% in quantity but increased by 19.51% in value, while Arabica exports increased by 49.83% and 155.85% in quantity and value respectively.

The decrease in Robusta exports was mainly attributed to lower yields this year that was characterized by drought in some regions. This led to a shorter main harvest season in Central and Eastern regions as well as a short fly crop in Greater Masaka and South-Western regions. The Increase in Arabica coffee exports is due to an on-year cycle characteristic of Arabica coffee production. Shortage of shipping containers in Asia and weather related concerns in Brazil fueled increase in global prices.

Coffee exports for the 12 months (April 2021-March 2022) amounted to 6,515,642 60-kilo bags worth US\$ 790.33 million compared to 5,646,897 60-kilo bags valued at US\$ 522.91 million the previous year (April 2020- March 2021). This represents 15.38% and 51.14% increase in both quantity and value respectively (Figure 1).

Fig 1: Trend of Total Quantity and Value of Coffee Exported: April 2021- March 2022



Table1: Comparison of Coffee Exports of March 2020/21 and 2021/22 Coffee Years

Period/Coffee Type	20	20/21	202	2021/22 %age Change		
renou/conee Type	Qty(60-kgbag)	Value (US \$)	Qty(60-kgbag)	Value (US \$)	Qty(60-kgbag)	Value (US \$)
March Total	571,799	53,477,689	478,023	80,989,012	- 16.40	1 51.44
Robusta	493,183	40,951,723	360,229	48,941,601	-26.96	1 19.51
Arabica	78,616	12,525,966	117,794	32,047,411	1 49.83	1 155.85

2. Exports by Type and Grade

Table 2 shows coffee exports by type, grade and average realized The share of Sustainable/washed coffee to total Robusta exports was price for each grade during the month of March 2022. The average export price was US\$ 2.82 per kilo, 14 cents higher than US\$ 2.68 per kilo realized in February 2022. It was US\$ 1.26 higher than in March 2021 (US \$ 1.56/kilo). Robusta exports accounted for 75% of total exports, slightly lower than 78% in February 2022. The average Robusta price was US\$ 2.26 per kilo, 9 cents higher than the previous month. Washed Robusta fetched the highest price of US\$ 3.15 per kilo, a premium of 80 US cents over conventional Screen 18. It was followed by Screen 18 sold at an average price of US\$ 2.35 per kilo.

only 1.57%. The proportion of Screen 18 was 21% of total Robusta.

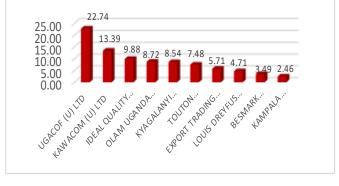
Arabica fetched an average price of US\$ 4.52 per kilo, 2 cents higher than in February 2022. The highest price was for Sustainable Arabica Fully Washed Sipi Falls sold at US\$ 5.42 per kilo, and was followed by Bugisu A+ sold at US\$ 5.41 per kilo, a premium of US Cents 36 over conventional Bugisu AA and Wugar which was sold at US\$ 5.06 per kilo. Drugar was sold at 4.23 US\$ per kilo, a discount of 83 cents from Bugisu AA. Drugar exports were 37% of total Arabica exports compared to 26% the previous month. The share of sustainable Arabica exports to total Arabica exports was 20%.

Coffee type	Quantity 60-Kilo Bags	%-age Quantity	Value in US\$	%-age Value	Unit Price US\$/Kilo
TOTAL	478,023		80,989,012		2.82
Organic Robusta	330	0.09	48,016	0.10	2.43
Washed Robusta	4,330	1.20	817,998	1.67	3.15
Screen 18 Fairtrade	330	0.09	44,088	0.09	2.23
Screen 15 Fairtrade	690	0.19	92,183	0.19	2.23
Screen 18	76,626	21.27	10,801,035	22.07	2.35
Screen 17	29,754	8.26	4,136,758	8.45	2.32
Screen 15	148,373	41.19	20,637,795	42.17	2.32
Screen 14	6,810	1.89	886,657	1.81	2.17
Screen 12	52,476	14.57	7,180,027	14.67	2.28
BHP 1199	17,940	4.98	1,788,172	3.65	1.66
Other Robustas	22,570	6.27	2,508,872	5.13	1.85
Total Robusta	360,229	100.00	48,941,601	100.00	2.26
Organic Bugisu	700	0.59	211,263	0.66	5.03
Organic Okoro	343	0.29	103,357	0.32	5.02
Sustnable Arabica Fully Washed Sipi Falls	7,719	6.55	2,509,523	7.83	5.42
Organic Drugar	640	0.54	177,847	0.55	4.63
Organic Wugar	320	0.27	63,492	0.20	3.31
Bugisu A+	2,460	2.09	798,747	2.49	5.41
Mt Elgon A+	7,536	6.40	2,384,137	7.44	5.27
Mt Elgon B	61	0.05	16,945	0.05	4.63
Mt Elgon C	12	0.01	3,333	0.01	4.63
Mt Elgon PB	40	0.03	11,111	0.03	4.63
Bugisu AA	16,586	14.08	5,038,454	15.72	5.06
Bugisu A	8	0.01	2,455	0.01	5.11
Bugisu AB	18,144	15.40	5,109,232	15.94	4.69
Bugisu B	7	0.01	2,130	0.01	5.07
Bugisu PB	127	0.11	38,812	0.12	5.09
Bugisu C/PB	1,640	1.39	426,562	1.33	4.33
Bugisu C	1,082	0.92	192,404	0.60	2.96
Mixed Arabica	640	0.54	105,821	0.33	2.76
Wugar	9,839	8.35	2,985,640	9.32	5.06
Drugar	43,403	36.85	11,015,667	34.37	4.23
Other Arabicas	6,487	5.51	850,480	2.65	2.19
Total Arabica	117,794	100.00	32,047,411	100.00	4.53

3. Individual Exporter Performance

Figure 2 shows the top 10 export companies in the month of March 2022. Ugacof (U) Ltd had the highest market share of 22.74% compared to 20.41% in February 2022. It was followed by Kawacom (U) Ltd 13.39% (6.32%); Ideal Quality Commodities Ltd 9.88% (10.41%) Olam Uganda Limited 8.72% (6.73%); Kyagalanyi Coffee Ltd 8.54% (6.52%) Touton Uganda Limited 7.48% (12.28%); Export Trading Company (U) Ltd 5.71% (2.25%); Louis Dreyfus Company (U) Ltd 4.71% (5.19%); Besmark Coffee Company Limited 3.49% (3.49%); and Kampala Domestic Store Ltd 2.46% (1.39%) *The figures in brackets represent percentage market share held in February 2022. The top 10 exporters held a market share of 87% higher than 79% the previous month. There were changes in positions compared to last month reflecting competition at the exporter level. Out of the 44 exporters that performed, 16 exported Robusta Coffee only while 12 exported Arabica coffee only. Annex 2 shows a detailed list of exporters' performance in March 2022.

Figure 2: Top 10 Exporting Companies by percentage market share



Foreign buyers of Uganda Coffee

2022. The top 10 buyers held a market share of 69% of total exports month of March 2022 are shown in Fig 3 (details in Annex 3). lower than 71% the previous month. Sucafina led with a market share of 14.49% compared to 19.48% in February 2022. It was followed by Olam International 9.44% (8.24%); Touton Geneve 8.19%;(12.13%); Ecom Agro Industrialist 7.76% (5.66%) Altasheel Import & Export Enterprises 7.48% (5.69%); Volcafe 5.32% (4.76%); Louis Dreyfus 4.77%; (5.68%) Cofftea Sudan 4.69%, Aldwami in February 2022. Company 3.51% (3.04%) and DFL For Complete Solution 3.44%

Note: The figures in brackets represent percentage performance in the previous month - February 2022.

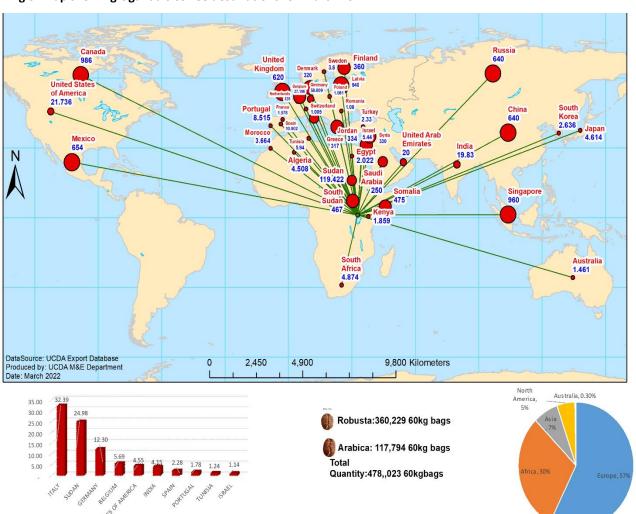
There were changes in relative position of the first ten major buyers reflecting increasing demand for Uganda coffee abroad.

5. Coffee Exports By Destination

Annex 4 shows a list of Ugandan coffee foreign buyers in March The destinations of Uganda's coffee exports during the Italy maintained the highest market share of 32.39% compared with 38.02% last month. It was followed by Sudan 24.98% (15.25%), Germany 12.30% (11.96%) Belgium 5.69% (2.65%) and United States of America 4.55% (4.39%). *The figures in brackets represent percentage market share held

> Coffee exports to Africa amounted to 143,231 bags, a market share of 30% compared to 94,647 bags (21%) the previous month. African countries included Algeria, Sudan, Morocco, Egypt, South Africa, South Sudan, Somalia and Kenya. Europe remained the main destination for Uganda's coffees with a 57% imports share lower than 62% February 2022.

Fig 3: Map showing Uganda's coffee destinations for March 2022.



6. Global Situation

World coffee exports for February 2022 amounted to 11.40 million bags up by 2% from 11.19 million bags in February 2021. The ICO Composite Indicator price decreased by 7.6% to 194.78 US cents down from 210.89 US cents in February 2022. Certified stocks at the major exchanges of New York and London grew in the month of March 2022. The stocks increased by 13.9% and 5.8% in New York and London respectively. Global coffee production for 2021/222 coffee year is estimated to decrease by 2.1% to 167.2 million bags down from 170.83 million bags in Coffee Year 2020/21. Global consumption is estimated to increase by 3.3% % to 170.3 million bags in 2021/22 coffee year compared to 164.9 million bags in 2020/21 coffee year (ICO March 2022 report).

7. Local Situation

During the month of March 2022, farm gate prices ranged from Sh.2,500-3,200/= per kilo of Kiboko (Robusta dry cherries); Shs. 6,300-6,800/= for FAQ; Sh. 10,000-11,000/= for Arabica parchment; and Sh.,9,000-10,000/= per kilo for Drugar from Kasese. Robusta Kiboko averaged UGX 2,750/= per kilo; FAQ UGX 6,550/= per kilo, Arabica parchment UGX 10,500/= per kilo and Drugar UGX 9,500/= per kilo.

8. Outlook for April 2022

Coffee exports are projected to be 430,000 bags. The main harvesting period season in Central and Eastern has come to its tail end. Exporters will drawdown their stocks to fulfil contractual obligations with buyers abroad. Focus is on the main season in Greater Masaka and South-Western regions which has also been affected by a dry spell.

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

Coffee Year	2020/21		2021	/22	%-age Change	
	Quantity	Value \$	Quantity	Value \$	Quantity	Value \$
Grand Total	2,859,563	262,736,709	2,878,115	422,942,542	0.65	60.98
Total Robusta	2,508,548	206,791,645	2,344,002	291,286,891	-6.56	40.86
Total Arabica	351,015	55,945,063	534,113	131,655,651	52.16	135.33
March	571,799	53,477,689	478,023	80,989,012	-16.40	51.44
Robusta	493,183	40,951,723	360,229	48,941,601	-26.96	19.51
Arabica	78,616	12,525,966	117,794	32,047,411	49.83	155.85
February	564,203	50,666,880	450,412	72,384,040	-20.17	42.86
Robusta	502,125	41,075,834	353,039	46,013,270	-29.69	12.02
Arabica	62,078	9,591,046	97,373	26,370,770	56.86	174.95
January	445,920	39,620,587	401,892	61,939,266	-9.87	56.33
Robusta	397,840	32,678,539	314,945	40,025,635	-20.84	22.48
Arabica	48,080	6,942,049	86,947	21,913,631	80.84	215.67
December	419,338	37,506,573	537,274	75,356,632	28.12	100.92
Robusta	371,625	30,573,920	452,578	55,273,179	21.78	80.79
Arabica	47,713	6,932,652	84,696	20,083,453	77.51	189.69
November	430,310	42,850,478	525,555	71,175,826	22.13	66.10
Robusta	372,517	30,575,512	437,053	51,501,665	17.32	68.44
Arabica	57,793	12,274,966	88,502	19,674,162	53.14	60.28
October	427,993	38,614,502	484,959	61,097,766	13.31	58.22
Robusta	371,258	30,936,117	426,158	49,531,541	14.79	60.11
Arabica	56,735	7,678,384	58,801	11,566,224	3.64	50.63

Annex 2: List of Coffee Exporters and their Market Shares: March 2022

	POSITION	Q	UANTITY (Bag	TITY (Bags) PERCENTAGE MARKET SHARE			
EXPORTING COMPANY	HELD IN FEBRUARY	Robusta	a Arabica	Total	Individual	Cumulative	
Total		360,229	117,794	478,023	100.00		
1 Ugacof (U) Ltd	1	103,571	5,120	108,691	22.74	22.74	
2 Kawacom (U) Ltd	6	43,535	20,452	63,987	13.39	36.12	
3 Ideal Quality Commodities Ltd	3	40,983	6,240	47,223	9.88	46.00	
4 Olam Uganda Ltd	4	17,252	24,416	41,668	8.72	54.72	
5 Kyagalanyi Coffee Ltd	5	24,078	16,742	40,820	8.54	63.26	
6 Touton Uganda Limited	2	22,920	12,825	35,745	7.48	70.74	
7 Export Trading Company (U) Ltd	11	27,310		27,310	5.71	76.45	
8 Louis Dreyfus Company (U) Ltd	7	21,864	640	22,504	4.71	81.16	
9 Besmark Coffee Company Limited	9	3,074	13,620	16,694	3.49	84.65	
0 Kampala Domestic Store Ltd	14	11,750		11,750	2.46	87.11	
1 Tata Uganda Limited	23	5,780		5,780	1.21	88.32	
2 Ibero (U) Ltd	8	5,148	564	5,712	1.19	89.51	
3 Great Lakes Coffee Company Ltd	16	2,406	2,276	4,682	0.98	90.49	
4 Kaweri Coffee Plantation	20	4,330		4,330	0.91	91.40	
5 Grainpulse Ltd	10	700	3,280	3,980	0.83	92.23	
6 The Edge Trading (U) Ltd	26	1,640	2,060	3,700	0.77	93.00	
7 Bakhsons Trading Co. (U) Ltd	21	2,722	640	3,362	0.70	93.71	
8 JKCC General Supplies Ltd	15	2,720	334	3,054	0.64	94.35	
9 Nakana Coffee Factory Ltd	29	3,024		3,024	0.63	94.98	
0 Bakwanye Trading Co. Ltd	27		2,880	2,880	0.60	95.58	
1 Jber Coffee Ltd	30	2,468		2,468	0.52	96.10	
2 Darley Investments Ltd	25	2,068		2,068	0.43	96.53	
3 Zigoti Coffee Works Ltd	24	2,024		2,024	0.42	96.95	
4 Commodity Solutions (U) Ltd	12	2,010		2,010	0.42	97.37	
5 Discovery Trading Limited	13	1,750		1,750	0.37	97.74	
6 Mbale Importers & Exporters Ltd	18		1,125	1,125	0.24	97.97	
7 Rezlex Investment Ltd	31	720	334	1,054	0.22	98.20	

Annex 2: List of Coffee Exporters and their Market Shares: March 2022

ex 2. List of conee exporters and then	POSITION	QL	JANTITY (Bag	s) Percentage Market Share		
Exporting Company	HELD IN FEBRUARY	Robusta		Total	Individual	Cumulative
28 Sena Indo Uganda Limited	17	1,050		1,050	0.22	98.41
29 Ankole Coffee Producers Coop Union Ltd	43	1,020		1,020	0.21	98.63
30 Zukuka Bora Coffee Company			759	759	0.16	98.79
31 Gisha Coffee Ltd			651	651	0.14	98.92
32 Bugisu Coop Union Ltd	44		640	640	0.13	99.06
33 Bukonzo Joint Co-operative Union Ltd	38		640	640	0.13	99.19
34 Kibinge Coffee Farmers' Coop Soc Ltd		640	0.10	640	0.13	99.32
35 Grade A Investments Ltd		600		600	0.13	99.45
	22					
36 Xag Coffee Exporters	22	570		570	0.12	99.57
37 Bugisu Commodity Traders Ltd	33	350		350	0.07	99.64
38 Coffee World Ltd	34		320	320	0.07	99.71
39 Friends Of Mothers Initiative Ltd			320	320	0.07	99.78
40 Mt Elgon Agroforestry Communities	46		320	320	0.07	99.84
41 Bariguna Coffee Ltd			308	308	0.06	99.91
42 Geruga Export Limited		152	110	262	0.05	99.96
43 Tariq General Suppliers Ltd			175	175	0.04	100.00
44 Nucafe	35		3	3	0.00	100.00

27 Latvia

Annex 3: Main Destinations of Uganda Coffee by Type in March 2022 QUANTITY (60kg bags) **POSITION DESTINATION HELD IN %AGE MARKET SHARE FEBRUARY** Robusta Individual **Cumulative** Arabica Total Total 100.00 360,229 117,794 478,023 1 Italy 1 135,489 19,354 154,843 32.39 32.39 2 2 Sudan 119,422 119,422 24.98 57.37 3 Germany 3 32,872 25,937 58,809 12.30 69.68 7 4 Belgium 9,978 27,196 5.69 75.37 17,218 United States of 5 5 America 2,080 19,656 21,736 4.55 79.91 4 6 India 17,710 2,120 19,830 4.15 84.06 7 Spain 6 8,008 2,894 10,902 2.28 86.34 9 3,560 8,515 88.12 8 Portugal 4,955 1.78 9 Tunisia 5,940 5,940 1.24 89.37 23 4,800 640 5,440 1.14 90.50 10 Israel 15 1.02 91.52 11 South Africa 4,541 333 4,874 14 1,340 3,274 4,614 0.97 92.49 12 Japan 18 0.94 13 Algeria 4,508 4,508 93.43 8 3,344 320 94.20 14 Morocco 3,664 0.77 21 0.75 94.95 15 Sweden 3,600 3,600 17 0.55 95.50 16 South Korea 2,636 2,636 17 Turkey 22 2,330 2,330 0.49 95.99 10 2,022 2,022 0.42 96.41 18 Egypt 19 Kenya 19 1,859 1,859 0.39 96.80 32 938 640 1,578 0.33 97.13 20 France 20 0.31 97.44 21 Australia 1,020 441 1,461 25 1,081 0.23 97.66 22 Poland 1,081 23 Romania 26 1,080 1,080 0.23 97.89 1,002 3 0.21 98.10 24 Switzerland 16 1,005 33 25 Canada 320 666 986 0.21 98.31 320 640 960 0.20 98.51 26 Singapore

940

940

0.20

98.70

Annex 3: Main Destinations of Uganda Coffee by Type in March 2022

Doctination	POSITION	QUANTITY (60kg	Bags)		%Age Market Sh	aro
Destination	HELD IN FEBRUARY	Robusta Arabica		Total	re Cumulative	
		Hobasta	7 ti dibita	Total	Individual	Camalative
28 Mexico	12	654		654	0.14	98.84
ZO WICKIEG	12	034		054	0.14	30.04
29 China	11	640		640	0.13	98.98
30 Russia	13	640		640	0.13	99.11
31 United Kingdom			620	620	0.13	99.24
32 Somalia		300	175	475	0.10	99.34
33 South Sudan	30	467		467	0.10	99.44
34 Finland			360	360	0.08	99.51
35 Jordan		334		334	0.07	99.58
				222	0.0-	20.05
36 Syria	28	330		330	0.07	99.65
37 Cape Verde		320		320	0.07	99.72
38 Denmark			320	320	0.07	99.78
39 Netherlands	31		320	320	0.07	99.85
40 Greece	27		317	317	0.07	99.92
41 Saudi Arabia			250	250	0.05	99.97
0.00			230	233	0.03	33.37
42 Czech Republic			125	125	0.03	100.00
43 United Arab Emirates			20	20	0.00	100.00

BUYERS	POSITION HELD		QUANTITY			
	FEBRUARY		(60kg BAGS) S Robusta Arabica Total Indiv			ARKET SHARE Cumulative
Total		360,229	117,794	478,023	100.00	Camalative
1 Sucafina	1	64,140	5,120	69,260	14.49	14.4
2 Olam International	3	20,346	24,776	45,122	9.44	23.9
3 Touton Geneve	2	22,200	16,965	39,165	8.19	32.1
4 Ecom Agro Industrialist	6	18,170	18,943	37,113	7.76	39.8
5 Altasheel Import & Export	4	35,767		35,767	7.48	47.3
6 Volcafe	8	12,818	12,613	25,431	5.32	52.6
7 Louis Dreyfus	5	21,864	960	22,824	4.77	57.4
8 Cofftea (Sudan)		22,400		22,400	4.69	62.:
9 Aldwami Company	9	16,800		16,800	3.51	65.6
10 DFL For Complete Solution		16,445		16,445	3.44	69.:
11 Luigi Lavazza	13	11,960		11,960	2.50	71.0
12 Almathahib	18	11,184		11,184	2.34	73.
13 Strauss	12	7,245	2,480	9,725	2.03	75.
14 ETC Trading		7,200		7,200	1.51	77.
15 Icona Café	10	4,308	1,920	6,228	1.30	78.
16 Tata Coffee Ltd	19	5,780		5,780	1.21	80.
17 Bernhard Rothfos	7	5,148	564	5,712	1.19	81.
18 Hamburg Coffee	14	4,020	1,540	5,560	1.16	82.
19 Bercher Coffee Consulting	17	2,442	2,560	5,002	1.05	83.
20 Tropical Gmbh	23	4,330		4,330	0.91	84.:
21 American Coffee			3,840	3,840	0.80	85.
22 Vollers			3,500	3,500	0.73	85.
23 Bijdendijk		668	2,664	3,332	0.70	86.
24 Nestle South Africa	29	3,240		3,240	0.68	87.
25 Indus Coffee	4.5	1,500	1,500	3,000	0.63	87.
26 Nkg Bero Italia	16	2,971	200	2,971	0.62	88.
27 CCL Products	21	2,100	300	2,400	0.50	88.
28 Nordelut 29 Briz Coffee		2,240	1,920	2,240 1,920	0.47	89. [.] 89.
30 Others		32,943	1,920	48,572	10.16	100.

Compiled by: Directorate of Strategy and Business Development Uganda Coffee Development Authority Tel: +256 312-260470 UCDA toll free no. 0800353530 Email: info@ugandacoffee.go.ug; www.ugandacoffee.go.ug March 2022