

MONTHLY COFFEE REPORT-DECEMBER 2024 COFFEE YEAR 2024/25 Issue 3

Key Highlights



A total of 413,079 60-kilo bags of coffee valued at US\$ 115.03 million were exported in December 2024 at an average price of US\$ 4.64/kilo, US cents 11 higher than US\$ 4.53/Kilo in November 2024, and US\$ 1.90 higher than US\$ 2.74/kilo in December 2023. This was an increase of 2.77 and 74.25% in quantity and value respectively compared to the same month last year.



Farm-gate prices for Robusta Kiboko averaged UGX **6,500** per kilo; FAQ UGX **12,500** per kilo, Arabica parchment UGX **12,500** per kilo and Drugar UGX **11,500** per kilo.



Coffee exports for twelve months (Calendar year 2024) totaled 6.37 million bags worth US\$ 1.55 billion compared to 6.12 million bags worth US\$ 965.27 million in the previous year (Calendar year 2023). This represents an increase of 4.12% and 60.61% in quantity and value respectively.



67% of the total volume was exported by 10 exporters, out of 60 companies which performed during the month compared to 66% in November 2024.

Mt. Elgon A+ fetched the highest price at US \$ 6.63 per kilo.

1. Coffee exports

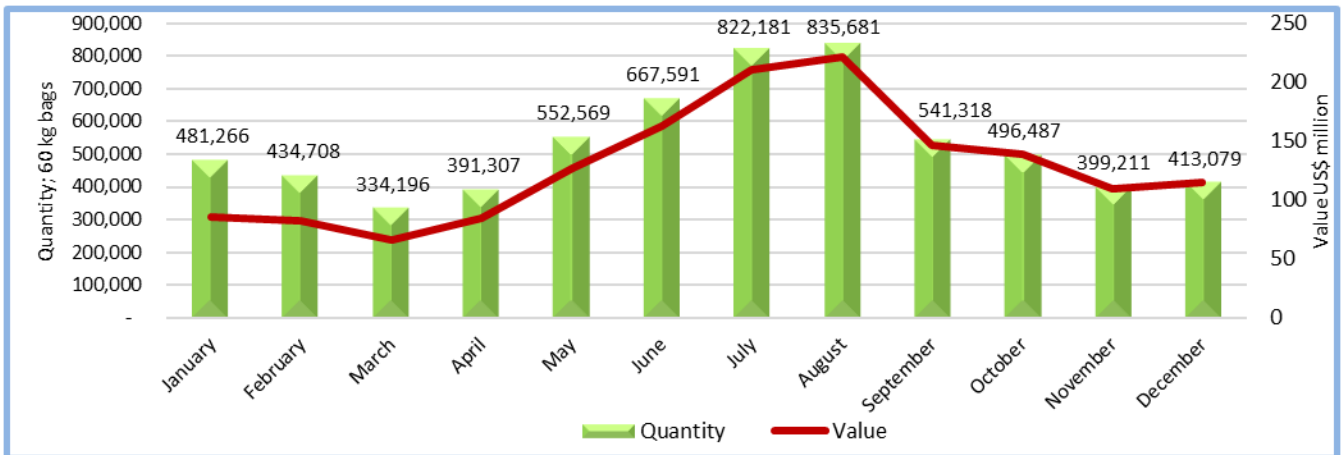
Coffee exports in December 2024, amounted to 413,079 60-kilo bags, worth US\$ 115.03 million as shown in **Fig 1**. This comprised of by 26.57% in quantity and increased by 15.54% in value. 365,853 bags of Robusta valued at US \$ 99.91 million and 47,226 bags of Arabica valued at US\$ 15.12 million (see *Table 1 and Annex 1*). This was an increase of 2.77% and 74.258% 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 Year (December 2023), Robusta increased by 8.36% and 88.77% in quantity and value respectively, while Arabica exports decreased by 26.57% in quantity and increased by 15.54% in value.

The monthly coffee exports volume was higher than the previous year and this was seen in Robusta exports. Arabica exports were lower due to the bi annual off year cycle coupled with poor flowering in Mt. Elgon region. The value of coffee exports was higher due in line with the increase in global coffee prices as a result of dry conditions in Brazil and Vietnam, the world's largest producers of Arabica and Robusta coffee respectively that are seen to affect coffee crop yields and, therefore, a likelihood of supply deficit in 2024/25.

Coffee exports for twelve months (Calendar year 2024) totaled 6.37 million bags worth US\$ 1.55 billion compared to 6.12 million bags worth US\$ 965.27 million in the previous year (Calendar year 2023). This represents an increase of 4.12% and 60.61% in quantity and value respectively

Fig 1: Trend of Total Quantity and Value of Coffee exports, January 2024- December 2024



Period/Coffee Type	2023/24		2024/25		%age Change	
	Qty(60-kg bags)	Value (US \$)	Qty(60-kg bags)	Value (US \$)	Qty	Value
December Total	401,944	66,010,411	413,079	115,025,696	↑ 2.77	↑ 74.25
Robusta	337,634	52,928,321	365,853	99,910,582	↑ 8.36	↑ 88.77
Arabica	64,310	13,082,090	47,226	15,115,114	↓ -26.57	↑ 15.54

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 2024. The average export price was US\$ 4.64 per kilo, US cents 11 higher than in November 2024 (US\$ 4.66). It was US\$ 1.90 higher than in December 2023 (US \$ 2.74/kilo). Robusta exports accounted for 88.6% of total exports, higher than 85.6% in November 2024. The average Robusta price was US\$ 4.55 per kilo, 10 cents higher than US\$ 4.45 per kilo the previous month. The highest price was for Screen 15 Organic and Screen 17 sold at US\$ 4.90 per kilo, followed by Screen 18 sold at US\$ 4.83 per kilo.

Table 2: Coffee Exports by Type, Grade & Unit Price in December 2024

Coffee type	Quantity 60-Kilo Bags	%-age Quantity	Value in US \$	%-age Value	Unit Price US\$/Kilo
Total	413,079		115,025,696		4.64
Washed Robusta	2,560	0.70	722,053	0.72	4.70
Screen 18 Fair Trade Organic	1,280	0.35	303,240	0.30	3.95
Screen 15 Organic	5,400	1.48	1,586,772	1.59	4.90
Screen 15 Fair Trade	1,080	0.30	215,716	0.22	3.33
Screen 14 Organic	720	0.20	187,525	0.19	4.34
Screen 12 Organic	360	0.10	93,763	0.09	4.34
Screen 18	51,682	14.13	14,991,467	15.00	4.83
Screen 17	22,079	6.03	6,488,009	6.49	4.90
Screen 15	169,629	46.37	48,012,928	48.06	4.72
Screen 14	360	0.10	93,763	0.09	4.34
Screen 12	60,640	16.57	16,873,776	16.89	4.64
BHP 1199	26,667	7.29	5,042,782	5.05	3.15
Other Robustas	23,396	6.39	5,298,790	5.30	3.77
Total Robustas	365,853	100.00	99,910,582	100.00	4.55
Bugisu Organic	600	1.27	196,827	1.30	5.47
Sustainable Arabica	650	1.38	243,743	1.61	6.25
Mt Elgon A+	840	1.78	334,013	2.21	6.63
Mt Elgon AA	320	0.68	93,943	0.62	4.89
Mt Elgon AB	320	0.68	110,054	0.73	5.73
Bugisu A+	350	0.74	111,112	0.74	5.29
Bugisu AA	3,084	6.53	1,175,085	7.77	6.35
Bugisu A	640	1.36	216,425	1.43	5.64
Bugisu AB	5,870	12.43	2,161,053	14.30	6.14
Bugisu CPB	666	1.41	239,709	1.59	6.00
Bugisu PB	10	0.02	2,910	0.02	4.85
Wugar	13,576	28.75	4,544,948	30.07	5.58
Drugar	9,887	20.94	3,399,178	22.49	5.73
Other Arabicas	10,413	22.05	2,286,116	15.12	3.66
Total Arabicas	47,226	100.00	15,115,114	100.00	5.33

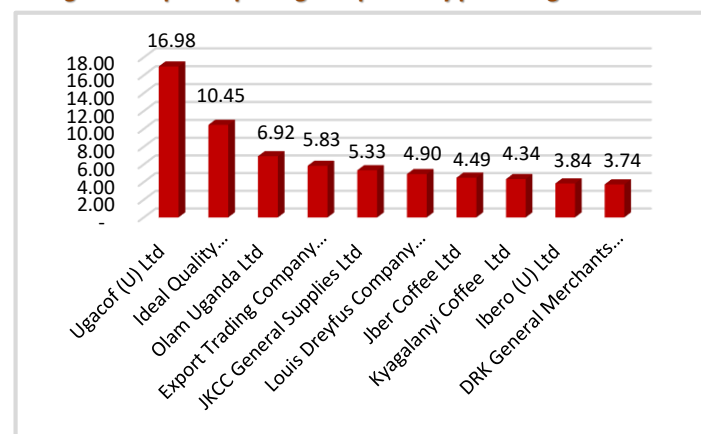
The share of Sustainable/washed coffee to total Robusta exports was 3.13% higher than 1.65% in November 2024. Arabica fetched an average price of US\$ 5.33 per kilo US cents 34 higher than the previous month (US\$ 4.99). The highest price was for Mt. Elgon A+ sold at US\$ 6.63 per kilo. It was followed by Bugisu AA sold at US\$ 6.35 per kilo. Drugar was sold at US\$ 5.73 per kilo, 72 cents higher than 5.01 per kilo the previous month. Drugar exports were 23% of total Arabica exports lower than 48% the previous month. The share of sustainable Arabica exports to total Arabica exports was 7% the same as in November 2024.

3. Individual Exporter Performance

Figure 2 shows the top 10 export companies' performance in the month of December 2024. Ugacof (U)Ltd had the highest market share of 16.98% compared to 13.30% in November 2024. It was followed by Ideal Quality Commodities Ltd 10.45% (14.80%); Olam Uganda Ltd 6.92% (13.19%), Export Trading Company (U) Ltd 5.83% (4.10%), JKCC General Supplies Ltd 5.33% (5.68%) Louis Dreyfus Company (U) Ltd 4.90% (3.43%), Jber Coffee Ltd 4.49% (5.59%), Kyagalanyi Coffee Ltd 4.34% (2.78%) Ibero (U) Ltd 3.84% (5.36%), and DRK General Merchants Ltd 3.74% (4.87%) *The figures in brackets represent percentage market share held in November 2024.

The top 10 exporters held a market share of 67% higher than 66% the previous month reflecting competition at exporter level. Out of the 60 exporters who performed, 35 exported Robusta Coffee only while 13 exported Arabica coffee only. **Annex 2** shows a detailed list of exporters' performance in December 2024.

Figure 2: Top 10 Exporting Companies by percentage market share



4. Coffee Exports By Destination

The destinations of Uganda's coffee exports during the month of December 2024 are shown in **Fig 3** (details in **Annex 4**). Italy maintained the highest market share with 38.40% compared to 38.74% last month. It was followed by Germany 12.22% (4.29%), India 9.14%% (9.61%), Spain 6.94% (2.10%) and Morocco 4.90% (4.18%). **The figures in brackets represent percentage market share held in November 2024.* The first 10 major destinations of Uganda coffee took a market share of 90.54% compared to 86.23% the previous month. Coffee exports to African countries totaled 49,765 bags, a market share of 12% compared to 66,570 bags (17%) the previous month. African countries that imported Uganda coffee included Morocco, Sudan, Algeria, Egypt, Tunisia, and Kenya. Europe remained the main destination for Uganda's coffees with a 69% import share, higher than 58% in November 2024.

5. Foreign buyers of Uganda Coffee

Annex 4 shows a list of Uganda coffee foreign buyers in December 2024. The top 10 buyers held a market share of 53.61% lower than 54.50% the previous month. Sucafina led with a market share of 17.06% compared to 13.30% in November 2024. It was followed by Olam International 6.92% (13.19%); Louis Dreyfus 5.33% (3.51%); Koninklijke Douwe 4.10% (1.52%); Bernhard Rothfos 3.76% (5.45%); Volcafe 3.68% (1.52%); Icona Café 3.68%; ETG Commodities 3.20% ; Ecom Agro Industrialist 3.10% (2.34%) and Pacorini Silocaf 2.97% (1.79%) *Note: The figures in brackets represent percentage performance in the previous month –November 2024.*

Figure 3: Top ten export destinations by percentage market share

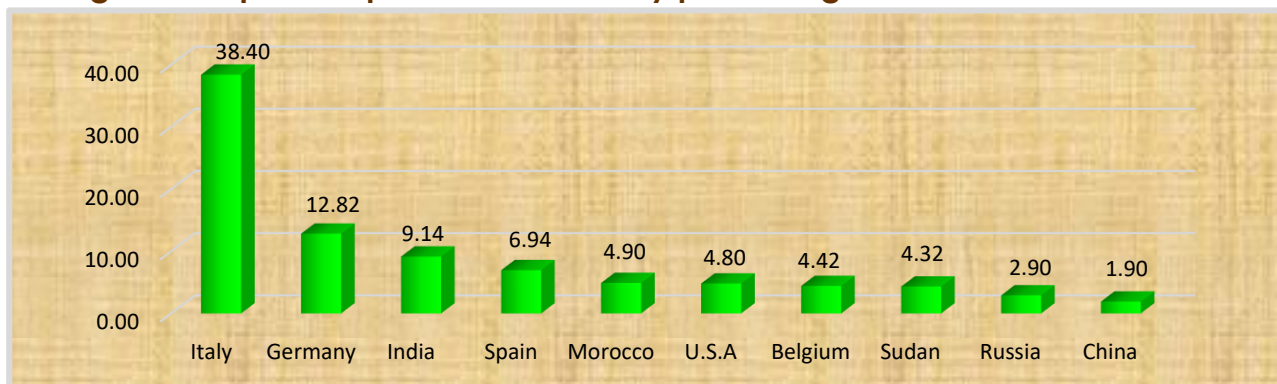


Figure 4: Percentage export share by continent

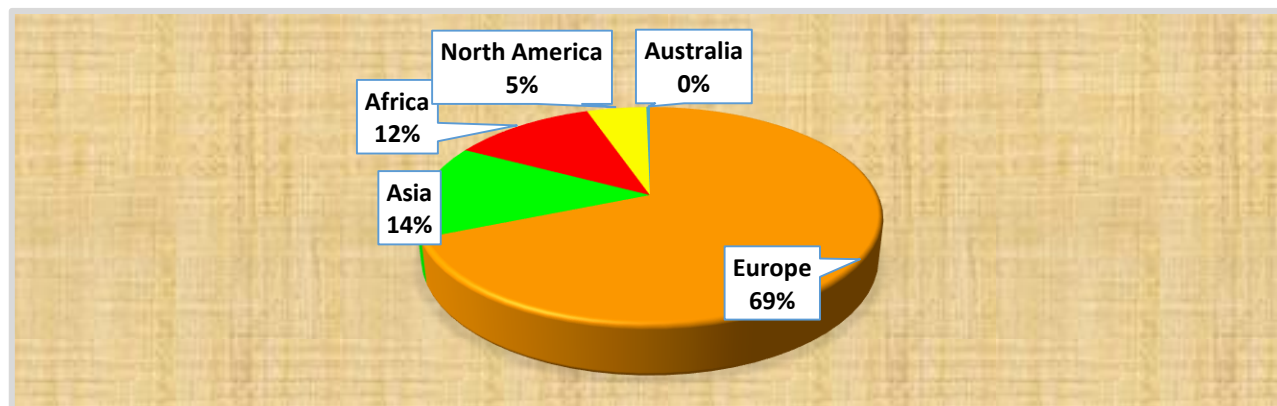
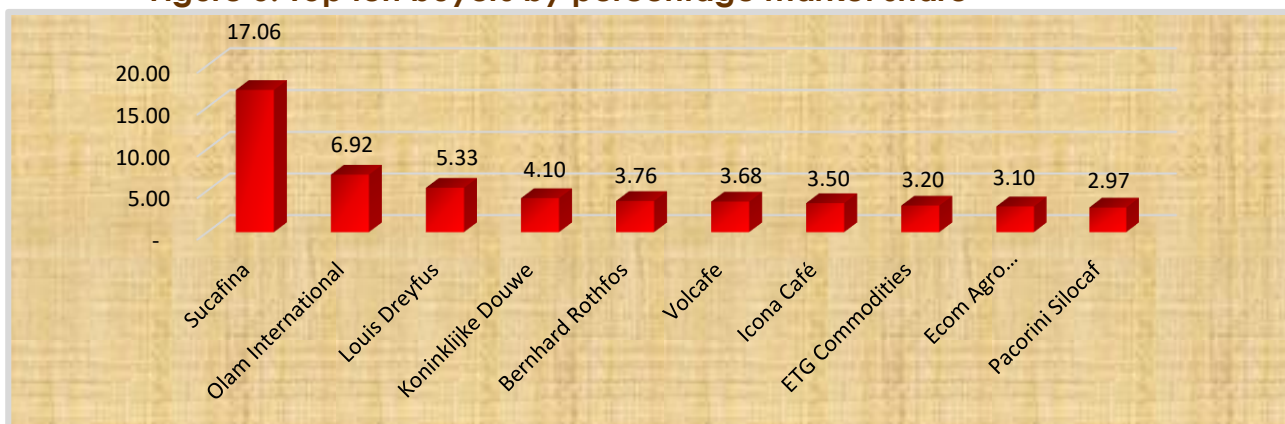


Figure 5: Top ten buyers by percentage market share



6. Global Situation

World coffee production for 2024/25 is forecast 6.9 million bags higher than the previous year to 174.9 million due primarily to rebounding output in Vietnam and Indonesia. World exports are forecast modestly higher as gains in Vietnam and Indonesia more than offset reduced shipments from Brazil. Global consumption is expected to rise 5.1 million bags to 168.1 million, with the largest gains in the European Union, the United States, and China. Ending stocks are expected to drop 1.5 million bags to 20.9 million. (United States Department of Agriculture, Coffee: World Markets and Trade report-December 2024).

8. Coffee Consumption and Promotional Activities.

Training for University students and hotels and restaurants staff was conducted as follows; 26 students from Mountains of the Moon University (male=18, Female=8), 26 from Kabale University (Male=10, Female=16), 17 from Uganda Christian University Mukono (Male=11, Female=6) and 18 youth (Male=14, Female=4) staff from hotels and restaurants in Fort portal. These training were aimed at teaching coffee brewing techniques to youth in order to improve the quality of coffee beverages.

In collaboration with UNDP 60(M=30, F=30) coffee sector players were trained in Q Arabica and Q Robusta. This was a comprehensive program that was aimed at equipping coffee cuppers with the ability to differentiate low and high end coffees and enables them to get Q grader internationally recognised certification. This training ultimately equips coffee producers with the ability to recognise Fine and speciality lots that can obtain premium prices.

7. Local Situation

During the month of December 2024, farm gate prices ranged from Shs 6,000-7,000/= per kilo of Kiboko (Robusta dry cherries); Shs.12,000-13,000/= for FAQ (Fair Average Quality); Sh. 12,000-13,000/= for Arabica Parchment; and Sh. 11,000-12,000/= per kilo for Drugar. Compared to the previous month, Robusta Kiboko averaged UGX 6,500/= lower than 6,750/= Robusta FAQ averaged UGX 12,500/= lower than UGX 12,750, Arabica parchment UGX 12,500 per kilo, Drugar UGX 11,500/= per kilo.

9. Coffee Development Activities

During December 2024, farmer trainings were significantly limited due to logistical challenges, negative propaganda, and misconceptions surrounding the RAPEX exercise. In response, staff shifted to individual farm visits rather than organized group sessions. These visits focused on Good Agricultural Practices (GAPs), Sustainable Land Management, Climate-Smart Agriculture, and Environmental Management, with emphasis on soil fertility, water conservation, pest and disease control, and coffee field rehabilitation. Soil analysis was conducted on 260 samples from 199 farmers, revealing deficiencies in organic matter, nitrogen, potassium, and phosphorus. Tailored recommendations were provided to address these issues. Using the Geospatial M&E system and farmer registration app, a cumulative of 14,294 coffee farms were registered in Kasese District. Alongside, nurseries, stores, and hullers were also registered. Additionally, 53 coffee factories, 24 stores, 11 roasters, and 9 wet mills were inspected to ensure compliance with quality standards. Awareness and sensitization efforts continued with follow-up meetings in various regions to clarify on issues arising from EUDR regulations. Under the UCDA-NEMA landscape management project in Mt. Elgon, the regional staff engaged the five participating cooperatives in the region, clarifying the project objectives and fostering collaboration. These efforts were complemented by the licensing of 28 coffee exporters across all the coffee growing regions, hence contributing to improved coffee quality and compliance to standards.

Despite these achievements, the program faced several challenges during implementation. Delays in payments and logistical support hampered field activities and the provision of timely assistance to farmers. Farmer skepticism about the registration process, coupled with low awareness of EUDR requirements and technological barriers such as limited smartphone access, posed significant obstacles. Coffee production was further impacted by pests, diseases, and adverse weather conditions. Negative propaganda led to a loss of trust in UCDA staff, further complicating outreach efforts. Limited sensitization of farmers on EUDR compliance remained a critical gap, underscoring the need for intensified awareness and capacity-building initiatives in the coming months.

9. Outlook for January 2025

Coffee exports are projected to be 500,000 60-kilobags. The main harvest season north of the equator has underway. The harvesting season for the fly crop in Greater Masaka and South-Western regions has also begun.

Annex 2: List of Coffee Exporters and their Market Shares: December 2024

EXPORTING COMPANY	POSITION HELD IN NOVEMBER	QUANTITY (Bags)		PERCENTAGE MARKET SHARE		
		Robusta	Arabica	Total	Individual	Cumulative
Total		365,853	47,226	413,079	100	
1 Ugacof (U) Ltd	1	55,748	14,382	70,130	16.98	16.98
2 Ideal Quality Commodities Ltd	8	41,576	1,596	43,172	10.45	27.43
3 Olam Uganda Ltd	2	27,588	1,000	28,588	6.92	34.35
4 Export Trading Company (U) Ltd	9	24,102		24,102	5.83	40.18
5 JKCC General Supplies Ltd	3	22,037		22,037	5.33	45.52
6 Louis Dreyfus Company (U) Ltd	11	20,235		20,235	4.90	50.42
7 Jber Coffee Ltd	4	18,552		18,552	4.49	54.91
8 Kyagalanyi Coffee Ltd	12	5,200	12,721	17,921	4.34	59.25
9 Ibero (U) Ltd	5	15,558	320	15,878	3.84	63.09
10 DRK General Merchants Ltd	7	15,430		15,430	3.74	66.83
11 Besmark Coffee Company Limited	15	13,719		13,719	3.32	70.15
12 Sena Indo Uganda Limited	10	9,780	1,080	10,860	2.63	72.78
13 Touton Uganda Limited	6	9,700		9,700	2.35	75.12
14 Ankole Coffee Producers Coop Union Ltd	27	9,560		9,560	2.31	77.44
15 Darley Investments Ltd	16	5,022	4,008	9,030	2.19	79.62
16 Grainpulse Ltd	21	7,515	285	7,800	1.89	81.51
17 Rezlex Investment Ltd	19	7,424		7,424	1.80	83.31
18 Kawacom (U) Ltd	14	4,150	2,530	6,680	1.62	84.93
19 Coffee World Ltd	23	6,328	320	6,648	1.61	86.54
20 Sukuma Commodities Limited	20	6,290		6,290	1.52	88.06
21 Noble Choice Limited	34	5,294		5,294	1.28	89.34
22 Commodity Solutions (U) Ltd	24	3,920		3,920	0.95	90.29
23 Noble Commodities (U) Ltd	28	3,758		3,758	0.91	91.20
24 Agri Evolve	17		3,360	3,360	0.81	92.01
25 Equatorial Beans Factory Ltd	30	3,340		3,340	0.81	92.82
26 Zigoti Coffee Works Ltd	33	2,241	640	2,881	0.70	93.52
27 Kaweri Coffee Plantation	26	2,560		2,560	0.62	94.14
28 Discovery Trading Limited	39	2,308		2,308	0.56	94.70

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Exporting Company	POSITION HELD IN NOVEMBER	QUANTITY (Bags)			Percentage Market Share	
		Robusta	Arabica	Total	Individual	Cumulative
29 Pra Exports Uganda Limited	35	1,500	600	2,100	0.51	95.21
30 Gisha Coffee Ltd	22	1,656		1,656	0.40	95.61
31 Ishaka Quality Commodities Ltd		1,500		1,500	0.36	95.97
32 Rubanga Cooperative Society Ltd	25	1,360		1,360	0.33	96.30
33 Abbarci Industries Limited	18	1,340		1,340	0.32	96.62
34 Agri Exim Limited		1,294		1,294	0.31	96.94
35 Nakana Coffee Factory Ltd	36	1,080		1,080	0.26	97.20
36 Agrocaf International Company Ltd		994		994	0.24	97.44
37 African Trade Winds Ltd		700		700	0.17	97.61
38 Kasiita Coffee Solutions Limited	50	700		700	0.17	97.78
39 Superbia International Coffee Trade Ltd	40	700		700	0.17	97.95
40 Two Rivers Investments Group Ltd		700		700	0.17	98.12
41 Black House Trading Co. Limited	41	668		668	0.16	98.28
42 Gemini Commodities Limited	31	668		668	0.16	98.44
43 Bakwanye Trading Co. Ltd	32		640	640	0.15	98.60
44 Bukonzo Joint Co-operative Union Ltd	53		640	640	0.15	98.75
45 Mount Elgon Coffee & Honey Cooperative	57		640	640	0.15	98.91
46 Bowi Logistics Ltd	38	384		384	0.09	99.00
47 Banta African Coffee Limited		350		350	0.08	99.08
48 Emirundi Trade Co. Ltd		350		350	0.08	99.17
49 Friends Of Mothers Initiative Ltd	54		350	350	0.08	99.25
50 Kwezi Coffee Limited	47		350	350	0.08	99.34
51 Xag Coffee Exporters	37		350	350	0.08	99.42
52 Nucafe	43	334		334	0.08	99.50
53 Cablinks Establishments Limited		320		320	0.08	99.58
54 Ekam Coffee Limited		320		320	0.08	99.66
55 Mt Elgon Agroforestry Communities	58		320	320	0.08	99.74

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Exporting Company	POSITION HELD IN NOVEMBER	QUANTITY (Bags)			Percentage Market Share	
		Robusta	Arabica	Total	Individual	Cumulative
56 Jofald Rayel Company Limited	67		308	308	0.07	99.81
57 Bufumbo Organic Farmers Association	52		300	300	0.07	99.88
58 The Coffee Gardens Limited	61		270	270	0.07	99.95
59 Mountain Harvest Smc Limited			200	200	0.05	100.00
60 Bugisu Coop Union Ltd	45		16	16	0.00	100.00

Annex 4: Main Destinations of Uganda Coffee by Type in December 2024

DESTINATION	POSITION HELD IN NOVEMBER	QUANTITY (60kg bags)			%AGE MARKET SHARE	
		Robusta	Arabica	Total	Individual	Cumulative
Total		365,853	47,226	413,079	100	
1 Italy	1	144,592	14,020	158,612	38.40	38.40
2 Germany	6	50,770	2,190	52,960	12.82	51.22
3 India	2	34,106	3,658	37,764	9.14	60.36
4 Spain	12	27,723	960	28,683	6.94	67.30
5 Morocco	7	20,236		20,236	4.90	72.20
6 U.S.A	4	9,632	10,191	19,823	4.80	77.00
7 Belgium	10	13,010	5,245	18,255	4.42	81.42
8 Sudan	8	17,850		17,850	4.32	85.74
9 Russia	5	7,967	4,008	11,975	2.90	88.64
10 China	9	7,508	320	7,828	1.90	90.54
11 Algeria	3	7,300		7,300	1.77	92.30
12 United Arab Emirates	13	4,072	306	4,378	1.06	93.36
13 Egypt	30	3,325		3,325	0.80	94.17
14 Portugal	17	3,261		3,261	0.79	94.96
15 Japan	11	1,280	1,542	2,822	0.68	95.64
16 Latvia	28	2,338		2,338	0.57	96.21
17 Israel	16	1,639		1,639	0.40	96.60
18 Vietnam			1,596	1,596	0.39	96.99
19 Ecuador	22	1,450		1,450	0.35	97.34
20 Netherlands	14	1,040	360	1,400	0.34	97.68
21 Albania	32	1,280		1,280	0.31	97.99
22 Turkey	24	1,280		1,280	0.31	98.30
23 Australia	20		1,160	1,160	0.28	98.58
24 Greece	26	1,080		1,080	0.26	98.84
25 Sweden	25		1,080	1,080	0.26	99.10
26 Tunisia	15	1,020		1,020	0.25	99.35
27 Lebanon	19	700		700	0.17	99.52

Annex 4: Main Destinations of Uganda Coffee by Type in December 2024

Destination	POSITION HELD IN NOVEMBER	QUANTITY (60kg Bags)			%Age Market Share	
		Robusta	Arabica	Total	Individual	Cumulative
28 Switzerland	38	694		694	0.17	99.69
29 Saudi Arabia	21		590	590	0.14	99.83
30 Poland		333		333	0.08	99.91
31 United Kingdom	23	333		333	0.08	99.99
32 Kenya	31	34		34	0.01	100.00

Annex 5: List of Foreign Coffee Buyers during the Month of December 2024

	BUYERS	POSITION HELD IN NOVEMBER	QUANTITY (60kg BAGS)		%AGE MARKET SHARE		
			Robusta	Arabica	Total	Individual	Cumulative
	Total		365,853	47,226	413,079	100	
1	Sucafina	1	56,082	14,382	70,464	17.06	17.06
2	Olam International	2	27,588	1,000	28,588	6.92	23.98
3	Louis Dreyfus	6	22,035		22,035	5.33	29.31
4	Koninklijke Douwe	16	16,920		16,920	4.10	33.41
5	Bernhard Rothfos	3	15,198	320	15,518	3.76	37.17
6	Volcafe	15	5,040	10,151	15,191	3.68	40.84
7	Icona Café		13,490	960	14,450	3.50	44.34
8	Etg Commodities		13,217		13,217	3.20	47.54
9	Ecom Agro Industrialist	9	10,176	2,650	12,826	3.10	50.65
10	Pacorini Silocaf	13	12,257		12,257	2.97	53.61
11	Hamburg Coffee	19	9,908	1,080	10,988	2.66	56.27
12	Touton SA	4	9,700		9,700	2.35	58.62
13	Altasheel Import & Export		8,750		8,750	2.12	60.74
14	Sucden Coffee	24	8,367		8,367	2.03	62.77
15	American Coffee	7	6,680	960	7,640	1.85	64.62
16	Dek Berlin		7,200		7,200	1.74	66.36
17	Romani	22	6,736		6,736	1.63	67.99
18	Taibi Hamid		6,660		6,660	1.61	69.60
19	Eurocaf Sas		6,012		6,012	1.46	71.06
20	Aldwami Co	25	5,250		5,250	1.27	72.33
21	Vidya Herbs	18	4,206	600	4,806	1.16	73.49
22	CCL Products	17	4,600		4,600	1.11	74.60
23	N V Group Sopex		4,598		4,598	1.11	75.72
24	Chongqing		4,443		4,443	1.08	76.79
25	Sds LLC	20	325	4,008	4,333	1.05	77.84
26	Orimi LLC		3,520		3,520	0.85	78.69
27	Narasus	12	3,440		3,440	0.83	79.53
28	Alea Food		3,322		3,322	0.80	80.33
29	Hafco Tradiing	8	2,800		2,800	0.68	81.01
30	Others		67,333	11,115	78,448	18.99	100.00

Tel: +256 312-260470
 Email: info@ugandacoffee.go.ug ; www.ugandacoffee.go.ug
 December 2024