

### Key Highlights



A total of 418,829 60-kilo bags of coffee valued at US\$ 59.54 million were exported in December 2022 at an average price of US\$ 2.37/kilo US cents 2 lower than US\$ 2.45 /kilo in November 2022, and US cents 3 higher than US\$ 2.34/kilo in December 2021. This was a decrease of 22% and 21% in quantity and value respectively compared to the same month last year.



Farm-gate prices for Robusta Kiboko averaged UGX 2,450 per kilo; FAQ UGX 6,150 per kilo, Arabica parchment UGX 9,500 per kilo and Drugar UGX 8,500 per kilo.



Coffee exports for 12 months (January-December 2022) totaled 5.63 million bags worth US\$ 859.94 million compared to 6.77 million bags worth US\$ 718.71 million the previous year (January-December 2021). This represents a decrease of 17% in quantity but an increase of 20% in value.



71% of the total volume was exported by 10 exporters, out of 55 companies which performed during the month, compared to 77% in November 2022.

Mt. Elgon A+ fetched the highest price at US \$ 5.10 per kilo.

### 1. Coffee exports

Coffee exports in December 2022 amounted to 418,829 60-kilo bags worth US\$ 59.54 million as shown in Fig 1. This comprised 331,476 bags of Robusta valued at US \$40.55 million and 87,353 bags of Arabica valued at US\$ 18.99 million (see Table 1 and Annex 1). This was a decrease of 22.05% and 20.99% 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 2021), Robusta decreased by 26.81% and 26.66% in quantity and value respectively, while Arabica exports increased by 3.5% in quantity but decreased by 5.37% in value.

The decrease in exports was mainly attributed to lower yields this year that were characterized by drought in most regions. This led to a shorter main harvest season in Central and Eastern regions and also reduced harvests from Greater Masaka and South-Western regions. However, despite being an off-year of the biennial cycle characteristic of Arabica coffee, coffee exports increased compared to the same month last year.

Coffee exports for 12 months (January - December 2022) totaled 5.63 million bags worth US\$ 859.94 million compared to 6.77 million bags worth US\$ 718.71 million the previous year (January-December 2021). This represents a decrease of 16.79% in quantity but an increase of 19.65% in value.

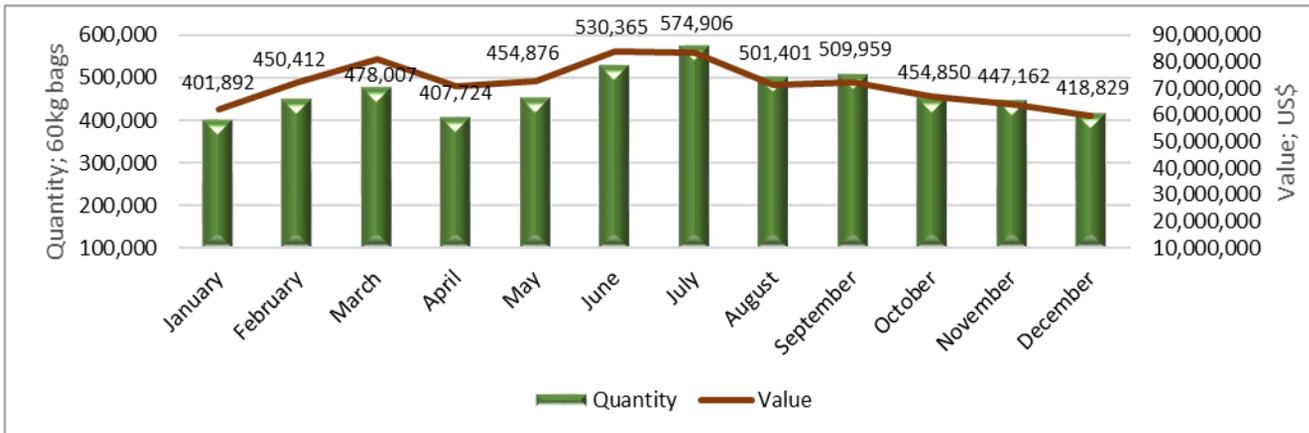


Table1: Comparison of Coffee Exports of December 2021/22 and 2022/23 Coffee Years

Period/Coffee Type	2021/22		2022/23		%age Change	
	Qty(60-kgbag)	Value (US \$)	Qty(60-kgbag)	Value (US \$)	Qty(60-kgbag)	Value (US \$)
<b>December Total</b>	537,274	75,356,632	418,829	59,538,090	↓ -22.05	↓ -20.99
Robusta	452,878	55,293,020	331,476	40,551,740	↓ -26.81	↓ -26.66
Arabica	84,396	20,063,612	87,353	18,986,350	↑ 3.50	↓ -5.37

## 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 2022. The average export price was US\$ 2.37 per kilo, 2 U.S cent lower than US\$ 2.39 per kilo realized in November 2022. It was 3 US cents higher than in December 2021 (US \$ 2.34/kilo). Robusta exports accounted for 79% of total exports lower than 82% in November 2022. The average Robusta price was US\$ 2.04 per kilo, US cents 3 lower than the previous month. Washed Robusta fetched the highest price of US\$ 2.29 per kilo. It was followed by Screen 14 Fair Trade at US\$ 2.27 per kilo. The share of Sustainable/washed coffee to total Robusta exports was only 2.55% higher than 0.93% in November 2022.

Arabica fetched an average price of US\$ 3.62 per kilo, 18 cents lower than US\$ 3.80 per kilo in October 2022. The highest price was Mt. Elgon A+ sold at US\$ 5.10 per kilo a premium of US \$ 1.19 over conventional Bugisu AA. It was followed by Mt. Elgon AA sold at US\$ 4.78 per kilo, a premium of US cents 88 over Conventional Bugisu AA. Drugar was sold at US\$ 3.40 per kilo, a discount of US cents 50 from Bugisu AA. Drugar exports were 39% of total Arabica exports compared to 38% the previous month.. The share of sustainable Arabica exports to total Arabica exports was 8% compared to 17% last month.

**Table 2: Coffee Exports by Type, Grade & Unit Price in December 2022**

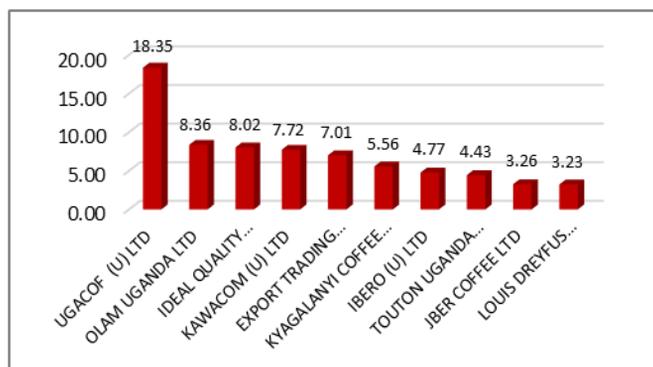
Coffee type	Quantity 60-Kilo Bags	%-age Quantity	Value in US \$	%-age Value	Unit Price US\$/Kilo
<b>Total</b>	<b>418,829</b>		<b>59,538,090</b>		<b>2.37</b>
Washed Robusta	320	0.10	44,021	0.11	2.29
SCREEN 18 Organic	160	0.05	21,376	0.05	2.23
SCREEN 18 Fair Trade	1,560	0.47	208,414	0.51	2.23
SCREEN 15 Organic	250	0.08	33,400	0.08	2.23
SCREEN 15 Fair Trade	6,170	1.86	824,304	2.03	2.23
SCREEN 14 Fair Trade	320	0.10	43,598	0.11	2.27
Screen 18	37,303	11.25	4,988,623	12.30	2.23
Screen 17	36,849	11.12	4,647,905	11.46	2.10
Screen 15	154,805	46.70	19,231,125	47.42	2.07
Screen 14	8,428	2.54	1,144,497	2.82	2.26
Screen 13	1,332	0.40	151,049	0.37	1.89
Screen 12	44,478	13.42	5,213,501	12.86	1.95
BHP 1199	23,045	6.95	2,172,190	5.36	1.57
Other Robustas	16,456	4.96	1,827,737	4.51	1.85
<b>Total Robusta</b>	<b>331,476</b>	<b>100.00</b>	<b>40,551,740</b>	<b>100.00</b>	<b>2.04</b>
Organic Bugisu	1,024	1.17	270,221	1.42	4.40
Sustainable Arabica	1,350	1.55	337,175	1.78	4.16
Organic Wugar	320	0.37	68,403	0.36	3.56
Organic Drugar	320	0.37	76,779	0.40	4.00
Bugisu A+	1,930	2.21	394,545	2.08	3.41
Mt Elgon A+	2,060	2.36	629,927	3.32	5.10
Mt Elgon AA	236	0.27	67,742	0.36	4.78
Mt Elgon AB	68	0.08	19,069	0.10	4.67
Bugisu AA	10,308	11.80	2,413,643	12.71	3.90
Bugisu AB	9,839	11.26	2,360,813	12.43	4.00
Bugisu A	1,640	1.88	356,473	1.88	3.62
Bugisu C/PB	354	0.41	50,913	0.27	2.40
Bugisu PB	100	0.11	17,196	0.09	2.87
Mixed Arabica	320	0.37	55,027	0.29	2.87
Wugar	14,647	16.77	3,788,991	19.96	4.31
Drugar	34,483	39.48	7,038,820	37.07	3.40
Other Arabicas	8,354	9.56	1,040,613	5.48	2.08
<b>Total Arabicas</b>	<b>87,353</b>	<b>100.00</b>	<b>18,986,350</b>	<b>100.00</b>	<b>3.62</b>

## 3. Individual Exporter Performance

**Figure 2** shows the top 10 export companies in the month of December 2022. Ugacof (U) Ltd had the highest market share of 18.35% compared to 16.66% in November 2022. It was followed by Olam Uganda Ltd 8.36% (7.91%); Ideal Quality Commodities (U)Ltd 8.02% (10.42%) Kawacom (U) Ltd 7.72% (6.69%); Export Trading Company (U) Ltd 7.01% (4.76%), Kyagalanyi Coffee Ltd 5.56% (4.70%); Ibero(U) Ltd 4.77% (5.18%); Touton Uganda Ltd 4.43% (8.92%); JBER Coffee Ltd 3.26% (0.58%); and Louis Dreyfus Company (U) Ltd 2.46% (9.20%) \*The figures in brackets represent percentage market share held in November 2022.

The top 10 exporters held a market share of 71% lower than 77% the previous month reflecting reduced concentration. Changes in exporter positions compared to last month show competition at this level. Out of the 55 exporters that performed, 21 exported Robusta Coffee only while 12 exported Arabica coffee only. **Annex 2** shows a detailed list of exporters' performance in December 2022.

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





## 6. Global Situation

World coffee production for 2022/23 is forecast to rebound 6.6 million bags from the previous year to 172.8 million due primarily to Brazil's Arabica crop entering the on-year of the biennial production cycle. Global consumption is expected to rise 800,000 bags to 167.9 million, with the largest gains in the European Union, the United States, and Brazil. World coffee bean exports are forecast 3.0 million bags lower to 116.1 million as losses in Brazil, Vietnam, and India more than offset gains in Honduras and Colombia. Ending stocks are expected 1.5 million bags higher to 34.1 million. (United States Department of Agriculture, Coffee: World Markets and Trade report).

## 7. Local Situation

During the month of November 2022, farm gate prices ranged from Sh.2,300-2,600/= per kilo of Kiboko (Robusta dry cherries); Shs. 5,800-6,500/= for FAQ (Fair Average Quality); Sh. 9,000- 10,000/= for Arabica parchment; and Sh. 8,000-9,000/= per kilo for Drugar from Kasese. Robusta Kiboko averaged UGX 2,450/= per kilo; FAQ UGX 6,150/= per kilo, Arabica parchment UGX 9,500/= per kilo and Drugar UGX 8,500/= per kilo.

## 9. Outlook for January 2023

Coffee exports are projected to be 400,000 bags. The main harvesting season in Central and Eastern regions started in November is likely to begin tailing off in February due to a short main harvest. Exporters are likely to drawdown on their stocks to fulfil contractual obligations with buyers abroad.

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

Coffee Year	2021/22		2022/23		%age Change	
	Quantity	Value \$	Quantity	Value \$	Quantity	Value \$
<b>Grand Total</b>	<b>1,548,148</b>	<b>207,673,858</b>	<b>1,320,841</b>	<b>190,414,371</b>	<b>-14.68</b>	<b>-8.31</b>
<b>Total Robusta</b>	<b>1,316,449</b>	<b>156,369,859</b>	<b>1,092,899</b>	<b>138,893,608</b>	<b>-16.98</b>	<b>-11.18</b>
<b>Total Arabica</b>	<b>231,699</b>	<b>51,303,998</b>	<b>227,942</b>	<b>51,490,764</b>	<b>-1.62</b>	<b>0.36</b>
<b>December</b>	<b>537,274</b>	<b>75,356,632</b>	<b>418,829</b>	<b>59,538,090</b>	<b>-22.05</b>	<b>-20.99</b>
Robusta	452,878	55,293,020	331,476	40,551,740	-26.81	-26.66
Arabica	84,396	20,063,612	87,353	18,986,350	3.50	-5.37
<b>November</b>	<b>525,915</b>	<b>71,219,460</b>	<b>447,162</b>	<b>64,138,603</b>	<b>-14.97</b>	<b>-9.94</b>
Robusta	437,413	51,545,298	364,875	45,378,404	-16.58	-11.96
Arabica	88,502	19,674,162	82,287	18,760,200	-7.02	-4.65
<b>October</b>	<b>484,959</b>	<b>61,097,766</b>	<b>454,850</b>	<b>66,737,678</b>	<b>-6.21</b>	<b>9.23</b>
Robusta	426,158	49,531,541	396,548	52,963,464	-6.95	6.93
Arabica	58,801	11,566,224	58,302	13,744,214	-0.85	18.83

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

EXPORTING COMPANY	POSITION HELD IN NOVEMBER	QUANTITY (Bags)		PERCENTAGE MARKET SHARE		
		Robusta	Arabica	Total	Individual	Cumulative
<b>Total</b>		<b>331,476</b>	<b>87,353</b>	<b>418,829</b>	<b>100</b>	
1 Ugacof (U) Ltd	1	69,790	7,050	76,840	18.35	18.35
2 Olam Uganda Ltd	5	20,654	14,369	35,023	8.36	26.71
3 Ideal Quality Commodities Ltd	2	30,540	3,055	33,595	8.02	34.73
4 Kawacom (U) Ltd	6	24,833	7,480	32,313	7.72	42.44
5 Export Trading Company (U) Ltd	8	29,348		29,348	7.01	49.45
6 Kyagalanyi Coffee Ltd	9	12,880	10,413	23,293	5.56	55.01
7 Ibero (U) Ltd	7	17,716	2,260	19,976	4.77	59.78
8 Touton Uganda Limited	4	13,620	4,940	18,560	4.43	64.21
9 Jber Coffee Ltd	25	13,650		13,650	3.26	67.47
10 Louis Dreyfus Company (U) Ltd	3	13,531		13,531	3.23	70.70
11 Sena Indo Uganda Limited	15	8,867	2,834	11,701	2.79	73.50
12 Ankole Coffee Producers Coop Union Ltd	14	11,340		11,340	2.71	76.21
13 Besmark Coffee Company Limited	13	2,095	7,360	9,455	2.26	78.46
14 Coffee World Ltd	12	7,670	1,650	9,320	2.23	80.69
15 Grainpulse Ltd	16	7,070	1,280	8,350	1.99	82.68
16 Darley Investments Ltd	11	4,899	3,120	8,019	1.91	84.60
17 Abbarci Industries Limited	26	6,568		6,568	1.57	86.16
18 JKCC General Supplies Ltd	10	3,804	1,294	5,098	1.22	87.38
19 Commodity Solutions (U) Ltd	19	4,550		4,550	1.09	88.47
20 Discovery Trading Limited	17	2,872	1,110	3,982	0.95	89.42
21 The Edge Trading (U) Ltd	21	960	2,771	3,731	0.89	90.31
22 Gisha Coffee Ltd	27	668	2,978	3,646	0.87	91.18
23 Bakhsons Trading Co. (U) Ltd	22	2,338	720	3,058	0.73	91.91
24 Agri Evolve	24		3,000	3,000	0.72	92.63
25 Orah Impex (U) Limited		2,800		2,800	0.67	93.30
26 Robust Commodities Uganda Limited		2,700		2,700	0.64	93.94
27 Tata Uganda Limited	37	2,700		2,700	0.64	94.58

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Exporting Company	POSITION HELD IN NOVEMBER	QUANTITY (Bags)			Percentage Market Share	
		Robusta	Arabica	Total	Individual	Cumulative
28 Xag Coffee Exporters	18	2,448		2,448	0.58	95.17
29 Zigoti Coffee Works Ltd	20	1,682		1,682	0.40	95.57
30 Nakana Coffee Factory Ltd	36	1,414		1,414	0.34	95.91
31 Great Lakes Coffee Company Ltd	28		1,364	1,364	0.33	96.23
32 Bakwanye Trading Co. Ltd	34		1,360	1,360	0.32	96.56
33 Mbale Importers & Exporters Ltd	31		1,294	1,294	0.31	96.87
34 Banyankole Coffee Services	32	1,080		1,080	0.26	97.13
35 Sukuma Commodities Limited	38	1,002		1,002	0.24	97.36
Seth & Cushman Market Traders 36 Limited	39	650	340	990	0.24	97.60
37 Nucafe	48	381	482	863	0.21	97.81
38 Grade A Investments Ltd		356	499	855	0.20	98.01
39 Prime African Coffee Initiative	35	700		700	0.17	98.18
40 Totongi Coffee Co. Ltd		700		700	0.17	98.35
41 Anderson Investments Ltd			670	670	0.16	98.51
42 Ishaka Quality Commodities Ltd		668		668	0.16	98.66
43 Rezlex Investment Ltd	30		668	668	0.16	98.82
44 Kibinge Coffee Farmers' Coop Soc Ltd	46	660		660	0.16	98.98
Bukonzo Organic Farmers Cooperative 45 Union			640	640	0.15	99.13
46 Funzo Coffee (U) Ltd	47		640	640	0.15	99.29
47 Perception Solution Ltd		84	487	571	0.14	99.42
48 Hermes Coffee Factory Ltd	29	334		334	0.08	99.50
48 Bukonzo Joint Co-operative Union Ltd	45		320	320	0.08	99.58
50 Kaweri Coffee Plantation	33	320		320	0.08	99.66
51 Mountain Harvest Smc Limited			320	320	0.08	99.73
52 Geruga Export Limited		234	85	319	0.08	99.81
53 Intouch Trading Ltd		300		300	0.07	99.88
54 Mt Elgon Agroforestry Communities	48		300	300	0.07	99.95
55 Bufumbo Organic Farmers Association	41		200	200	0.05	100.00

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

DESTINATION	POSITION HELD IN OCTOBER	QUANTITY (60kg bags)			%AGE MARKET SHARE	
		Robusta	Arabica	Total	Individual	Cumulative
Total		331,476	87,353	418,829	100	
1 Italy	1	145,178	15,945	161,123	38.47	38.47
2 Sudan	3	69,650		69,650	16.63	55.10
3 Germany	3	37,864	11,015	48,879	11.67	66.77
4 India	4	26,554	5,729	32,283	7.71	74.48
5 Belgium	6	12,646	13,305	25,951	6.20	80.67
6 United States	8	1,640	12,793	14,433	3.45	84.12
7 Morocco	5	10,126	653	10,779	2.57	86.69
8 Spain	7	6,433	4,210	10,643	2.54	89.23
9 Netherlands	35	3,934	2,434	6,368	1.52	90.76
10 Israel	15	3,320	2,880	6,200	1.48	92.24
11 South Korea	16		3,650	3,650	0.87	93.11
12 Russia	20	2,880	660	3,540	0.85	93.95
13 Turkey	12	3,260		3,260	0.78	94.73
14 Poland		720	2,160	2,880	0.69	95.42
15 France	23	270	1,934	2,204	0.53	95.94
16 Egypt	25	1,734	334	2,068	0.49	96.44
17 Estonia	13	1,280	640	1,920	0.46	96.90
18 United Kingdom	21	16	1,564	1,580	0.38	97.27
19 South Africa	18		1,260	1,260	0.30	97.57
20 Japan	29		1,080	1,080	0.26	97.83
21 Sweden	9		1,080	1,080	0.26	98.09
22 Finland	28	960		960	0.23	98.32
23 Switzerland	10		960	960	0.23	98.55
24 Saudi Arabia	37	700		700	0.17	98.72
25 Algeria	30	668		668	0.16	98.88
26 Georgia	19	334	320	654	0.16	99.03
27 Latvia		640		640	0.15	99.18

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

Destination	POSITION HELD IN NOVEMBER	QUANTITY (60kg Bags)			%Age Market Share	
		Robusta	Arabica	Total	Individual	Cumulative
28 Singapore	31		640	640	0.15	99.34
29 United Arab Emirates	11		640	640	0.15	99.49
30 Romania	27		350	350	0.08	99.57
31 Jordan	33		334	334	0.08	99.65
32 Kenya	32	334		334	0.08	99.73
33 Australia			320	320	0.08	99.81
34 China	14	320		320	0.08	99.89
35 Somalia			285	285	0.07	99.95
36 New Zealand		15	178	193	0.05	100.00

**Annex 4: List of Foreign Coffee Buyers during the Month of December 2022**

	BUYERS	POSITION HELD IN NOVEMBER	QUANTITY		%AGE MARKET SHARE		
			(60kg BAGS)		Total	Individual	Cumulative
			Robusta	Arabica			
	<b>Total</b>		<b>331,476</b>	<b>87,353</b>	<b>418,829</b>	<b>100.00</b>	
1	Sucafina	1	62,844	5,990	68,834	16.43	16.43
2	Olam International	4	21,014	15,009	36,023	8.60	25.04
3	Ecom Agro Industrialist	5	26,567	7,480	34,047	8.13	33.16
4	Hamburg Coffee	12	20,605		20,605	4.92	38.08
5	Bernhard Rothfos	6	17,716	2,260	19,976	4.77	42.85
6	Touton Geneve	3	13,620	4,940	18,560	4.43	47.29
7	Jacobs Douwe Egberts	13	14,820	320	15,140	3.61	50.90
8	Louis Dreyfus	2	13,531	640	14,171	3.38	54.28
9	Cofftea (Sudan)	19	13,300		13,300	3.18	57.46
10	DLF For Complete Solution		11,900		11,900	2.84	60.30
11	Volcafe	8	4,280	7,453	11,733	2.80	63.10
12	Vidya Herbs	11	10,500	1,080	11,580	2.76	65.87
13	Bercher Coffee Consulting	9	1,058	8,320	9,378	2.24	68.11
14	Dek Berlin	27	7,200		7,200	1.72	69.82
15	Elmathahib	14	7,000		7,000	1.67	71.50
16	Transgo S.R.L		6,740		6,740	1.61	73.11
17	Icona Café	10	3,983	2,360	6,343	1.51	74.62
18	Strauss	18	2,320	3,150	5,470	1.31	75.93
19	Aldwami Co	29	5,250		5,250	1.25	77.18
20	Food And Spices		4,900		4,900	1.17	78.35
21	Mayasim		4,900		4,900	1.17	79.52
22	GBR			3,600	3,600	0.86	80.38
23	Eldegys Co.		3,500		3,500	0.84	81.21
24	Etc Trading		3,500		3,500	0.84	82.05
25	CCL Products	25		3,055	3,055	0.73	82.78
26	Ii Polo Del Caffè		3,006		3,006	0.72	83.50
27	Walter Matter	15	3,005		3,005	0.72	84.21
28	NV Group Sopex	26	2,672	320	2,992	0.71	84.93
29	SLN Coffee Ltd	28	2,968		2,968	0.71	85.64
30	Others		38,777	21,376	60,153	14.36	100.00