



Key Highlights



A total of 420,373-kilo bags of coffee valued at US\$ 39.99 million were exported in June 2020 at an average weighted price of US\$ 1.59 /kilo, 3 cents lower than US\$ 1.62 /kilo in May 2020. This was an increase of 23.17% and 25.47% in quantity and value respectively compared to the same period last year.



Coffee exports for the 12-months period (July 2019 to June 2020) totalled to 5,103,771 bags worth US 496.15 million compared to 4,168,408 bags worth US\$ 415.13 million the previous year.



Farm-gate prices for Robusta Kiboko averaged UGX 1,850 per kilo; FAQ UGX 3,850 per kilo, Arabica parchment UGX 4,500 per kilo and Drugar UGX 4,300 per kilo.



80.89% of the total volume was exported by 10 exporters, out of 37 companies which performed during the month compared to 84.34% in 2020, reflecting decreasing concentration.



The ICO Composite Indicator price decreased by 5.2% to 99.05 US cents/lb in June 2020 from US cents/lb 104.45 in May 2020.

1. Coffee exports

Coffee exports in June 2020 amounted to 420,373 60-kilo bags worth US\$ 39.99 million as shown in Fig 1. This comprised 344,438 bags (US \$ 29.13 million) of Robusta and 75,935 bags (US\$ 10.86 million) of Arabica (see Table 1 and Annex 1). This was an increase of 23.17% and 25.47% in quantity and value respectively from the same month last year.

The increase in exports has been attributed to the increased production on account of fruition of the newly planted coffee, and favourable weather, the lower global prices due to COVID-19 related lower demand from consuming countries notwithstanding. Exports were to some extent constrained by delays especially at Malaba border post whereby drivers undergo thorough testing for COVID-19 pandemic.

By comparing quantity of coffee exported by type in the same month of last Coffee Year (June 2019), Robusta increased both in quantity and value (34.39% and of 32.14%) respectively. Arabica exports registered a 10.67% decrease in quantity and 9.39% increase in value.

Coffee exports for the Financial Year 2019/20 amounted to 5,103,771-kilo bags worth US\$ 496 million compared to 4,168,408 60-kilo bags worth US\$ 415 million the previous year. This represents 22% and 19% increase in both quantity and value respectively. (figure 1)

Fig 1: Trend of Total Quantity and Value of Coffee Exported: July 2019- June 2020

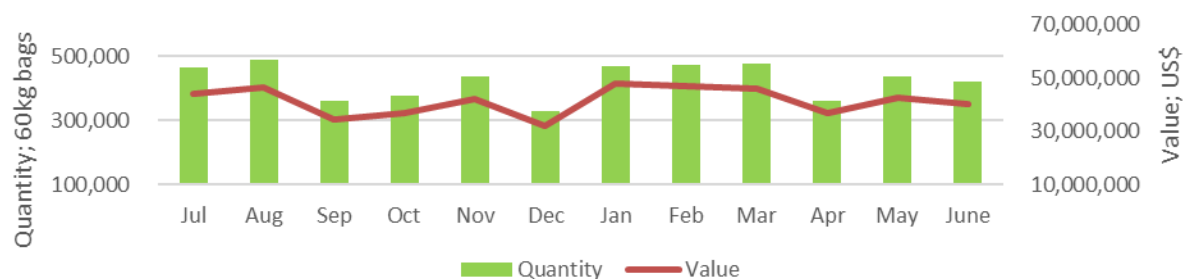


Table1: Comparison of Coffee Exports of June 2018/19 and 2019/20 Coffee Years

Period/Coffee Type	2019/20		2018/19		%age Change	
	Qty(60-kgbag)	Value (US \$)	Qty(60-kgbag)	Value (US \$)	Qty(60-kgbag)	Value (US \$)
May Total	420,373	39,992,967	341,294	31,873,499	↑ 23.17	↑ 25.47
Robusta	344,438	29,853,085	256,291	22,592,271	↑ 34.39	↑ 32.14
Arabica	75,935	10,153,159	85,003	9,281,228	↓ -10.67	↑ 9.39

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 June 2020. The average export price was US\$ 1.59 per kilo, 3 cents lower than US\$ 1.62 per kilo realized last month. Robusta exports accounted for 79.56% of total exports compared to 77.89% in May 2020. The average Robusta price was US\$ 1.41 per kilo, US cent 3 lower than the previous month. Organic Robusta fetched the highest price of US\$ 1.66 per kilo, a premium of 19 cents over conventional Screen 18 sold at an average of US\$ 1.47 per kilo. Worth noting is that Screen 17 fetched a price a higher price than Screen 18 at US\$ 1.56.

This reflects price differentiation and a positive impact on the new grades.

Arabica fetched an average price of US\$ 2.38 per kilo, 15 cents higher than in May 2020. The highest price was for Bugisu PB sold at US\$ 3.62 per kilo followed by Bugisu A sold at US\$ 3.59 per kilo. It should, however, be noted these were small quantities and could have been sold as a sample. Organic Bugisu sold at US\$ 3.20 per kilo, a premium price of US cents 65 over Conventional Bugisu AA. Drugar exports had a 35% share of Arabica exports compared to 45% the previous month.

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

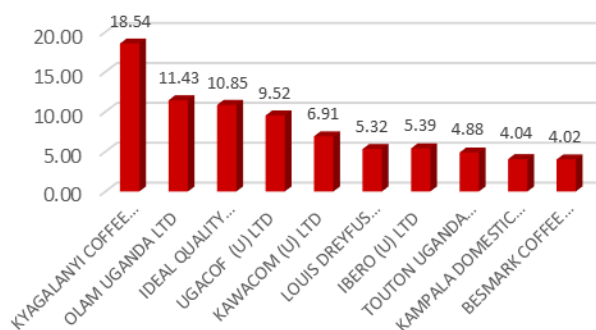
Coffee type	Quantity 60-Kilo Bags	%-age Quantity	Value in US \$	%-age Value	Unit Price US\$/Kilo
TOTAL	420,373		39,992,967		1.59
Washed Robusta	1,060	0.31	105,821	0.36	1.66
Screen 18	35,058	10.18	3,088,487	10.60	1.47
Screen 17	21,290	6.18	1,997,302	6.86	1.56
Screen 15	177,760	51.61	15,463,547	53.08	1.45
Screen 14	1,280	0.37	111,747	0.38	1.46
Screen 12	65,335	18.97	5,353,160	18.38	1.37
BHP 1199	29,610	8.60	2,083,181	7.15	1.17
Other Robustas	13,045	3.79	927,041	3.18	1.18
Total Robustas	344,438	100.00	29,130,285	100.00	1.41
Organic Bugisu	620	0.82	119,115	1.10	3.20
Organic Okoro	350	0.46	47,917	0.44	2.28
Organic Drugar	1,039	1.37	157,775	1.45	2.53
Sustainable Arabica	660	0.87	109,657	1.01	2.77
Mt Elgon Aa	320	0.42	53,334	0.49	2.78
Mt Elgon A+	8,042	10.59	1,445,113	13.30	2.99
Bugisu A+	4,120	5.43	652,204	6.00	2.64
Bugisu AA	8,319	10.96	1,270,881	11.70	2.55
Bugisu AB	2,753	3.63	420,588	3.87	2.55
Bugisu A	45	0.06	9,681	0.09	3.59
Bugisu B	6	0.01	850	0.01	2.36
Bugisu C/PB	180	0.24	30,953	0.28	2.87
Bugisu PB	49	0.06	10,634	0.10	3.62
Wugar	13,380	17.62	2,092,534	19.26	2.61
Drugar	28,792	37.92	3,822,909	35.19	2.21
Other Arabicas	7,260	9.56	618,537	5.69	1.42
Total Arabicas	75,935	100.00	10,862,682	100.00	2.38

3. Individual Exporter Performance

Figure 2 shows the top 10 export companies in the month of June 2020. Kyagalanyi Coffee Ltd led with a market share of 18.54% compared to 24.48% last month. It was followed by Olam Uganda Ltd 11.43% (7.80%); Ideal Quality Commodities Ltd 10.85% (6.88%); Ugacof (U) Ltd 9.52% (16.57%) Kawacom (U) Ltd 6.91% (7.77%) Louis Dreyfus Company (U) Ltd 5.32% (4.88%); and Ibero (U) Ltd 5.39% (3.71 %).

The top 10 exporters held a market share of 80.89% compared to 84.35% the previous month. There were minor changes in positions compared to last month reflecting efficiency of exporters. Out of the 37 exporters that performed, 17 exported Robusta Coffee only while 8 exported Arabica coffee only. Annex 2 shows a detailed list of exporters performance in June 2020. *The figures in brackets represent percentage market share held in May 2020.

Figure 2: Top 10 Exporting Companies by percentage market share



4. Local Situation

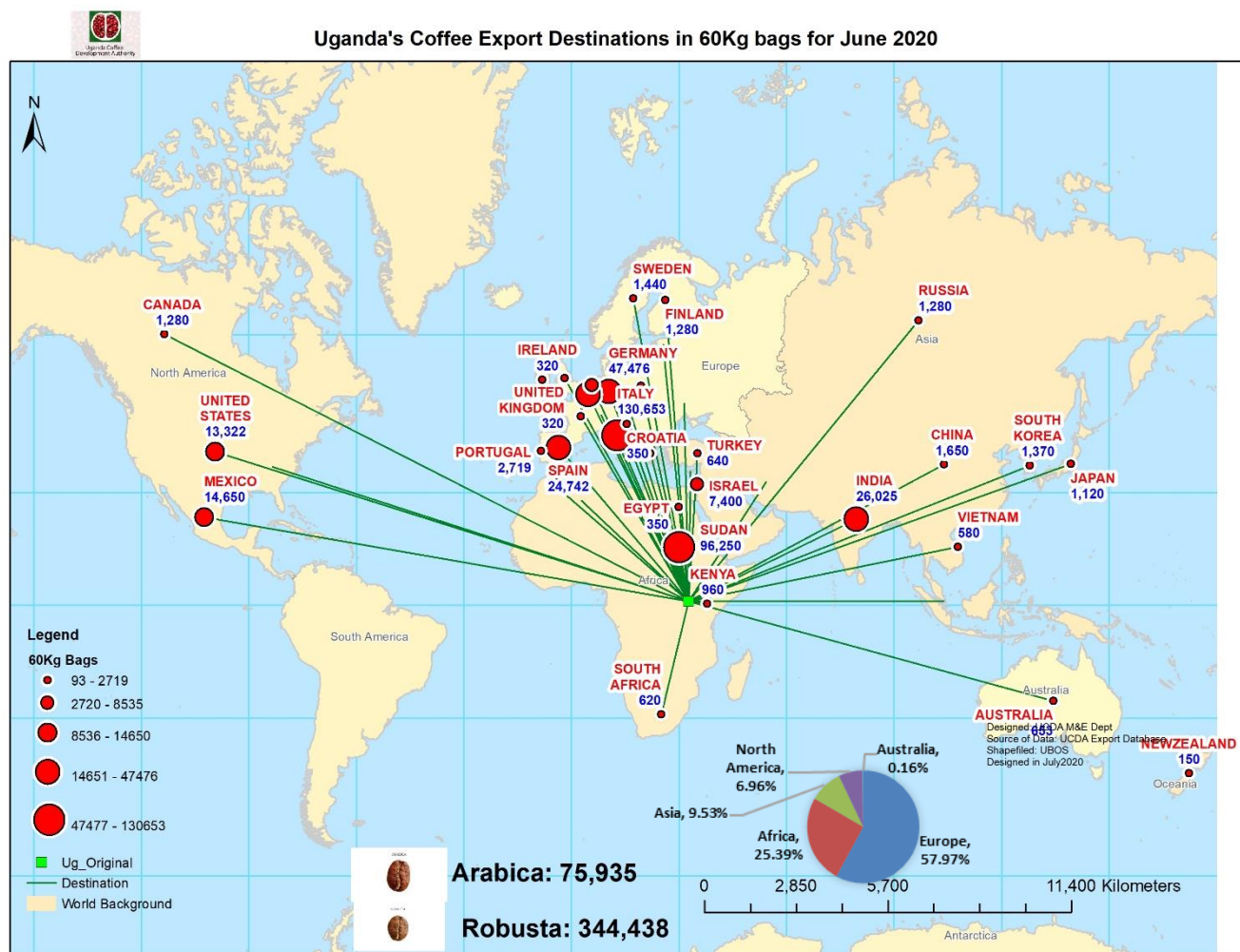
During the month of June 2020, farm gate prices ranged from Sh.1,700 -2,000 per kilo of Kiboko (Robusta dry cherries); Shs. 3,700-4,000/= for FAQ; Sh. 4,200-4,800/= for Arabica parchment; and Sh. 4,000-4,500/= per kilo for Drugar from Kasese. Robusta Kiboko averaged UGX 1,850 per kilo; FAQ UGX 3,850 per kilo, Arabica parchment UGX 4,500/= per kilo and Drugar UGX 4,250 per kilo.

5. Global Situation

World coffee exports amounted to 10.49 million bags in May 2020, compared with 12.29 million in May 2019. Exports in the first 8 months of Coffee Year 2019/20 (Oct 2019 to May 2020) have decreased by 4.7% to 83.81 million bags compared with 87.96 million bags in the same period in 2018/19. The ICO Composite Indicator price decreased by 5.2% to 99.05 US cents/lb in June 2020 from US cents/lb 104.45 in May 2020. Expectations of a bumper harvest from Brazil's harvest and outlook for decreased COVID-19 related demand put pressure on coffee prices.

6. Coffee Exports by Destination

The destinations of Uganda's coffee exports during the month of June 2020 are shown in Fig 3 (details in Annex 3). Italy maintained the highest market share with 31.08% compared with 31.18% last month. It was followed by Sudan 22.90% (18.16%), Germany 11.29% (11.06%) and Belgium 6.60% (5.07%). Coffee exports to Africa amounted to 106,715 bags, a market share of 25.39% compared to 86,854 bags (19.85%) the previous month. Africa countries included Sudan, Morocco, South Africa, Kenya and Egypt. Europe remains the main destination for Uganda's coffees with a 58% imports share.*The figures in brackets represent percentage market share held in May 2020.



7. Foreign buyers of Uganda Coffee

Annex 4 shows a list of Ugandan coffee buyers in June 2020. The top 10 buyers held a market share of 67.08% of total exports, lower than 71.54% the previous month. Olam International led with a market share of 13.36% compared to 9.70% in May 2020. It was followed by Altasheel Import & Export 11.16% (8.08%); Volcafe 9.37% (17.93%); Sucafina 8.86% (14.83%), Bernhard Rothfos 5.39% (4.40%); Ecom Agro Industrial 5.27% (4.64%), Minor changes in relative position compared to the previous month reflect consolidation and efficiency of major buyers as well as increased demand for Uganda coffee.

Note: *The figures in brackets represent percentage performance in the previous month –May 2020.*

8. Coffee Development and Promotional Activities

UCDA continued to monitor cooperative societies which had been allocated fertilizers to ensure proper accountability and profiling of beneficiaries. Enforcement of quality standards through on farm and factory inspection, registration and licensing continued during the month. Using COVID-19 guidelines of maintaining social distance and minimizing contact, UCDA field officers continued to provide extension services that ensured proper maintenance of coffee gardens during the first season of 2020. UCDA verified and certified Arabica coffee nurseries and CWDr mother gardens in readiness for second rainy season.

9. Outlook for July 2020

Coffee exports are projected to be 450,000 bags as the main season in Masaka and South-western regions peaks. The season has been supported by favourable rains

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

Coffee Year	2019/20		2018/19		%age Change	
	Quantity	Value \$	Quantity	Value \$	Quantity	Value \$
Grand Total	3,788,979	371,201,646	3,125,016	309,009,314	21.25	20.13
Total Robusta	3,022,309	267,677,859	2,359,463	218,035,781	28.09	22.77
Total Arabica	766,670	103,537,062	765,553	90,973,533	0.15	13.81
June	420,373	39,992,967	341,294	31,873,499	23.17	25.47
Robusta	344,438	29,853,085	256,291	22,592,271	34.39	32.14
Arabica	75,935	10,153,159	85,003	9,281,228	-10.67	9.39
May	437,597	42,479,206	345,786	32,998,507	26.55	28.73
Robusta	340,830	29,540,631	250,957	22,319,640	35.81	32.35
Arabica	96,767	12,938,575	94,829	10,678,867	2.04	21.16
April	359,973	36,914,686	305,643	30,048,530	17.78	22.85
Robusta	262,676	22,547,994	219,298	19,962,247	19.78	12.95
Arabica	97,297	14,366,692	86,345	10,086,283	12.68	42.44
March	479,361	46,002,897	345,085	33,794,213	38.91	36.13
Robusta	387,778	33,222,298	265,655	24,284,040	45.97	36.81
Arabica	91,583	12,780,599	79,430	9,510,173	15.30	34.39
February	473,328	46,757,304	323,182	32,594,100	46.46	43.45
Robusta	388,980	34,659,016	261,526	24,209,036	48.73	43.17
Arabica	84,348	12,098,287	61,656	8,385,064	36.80	44.28
January	469,663	47,974,121	394,937	39,197,834	18.92	22.39
Robusta	376,874	34,286,315	325,694	29,937,435	15.71	14.53
Arabica	92,789	13,687,806	69,243	9,260,399	34.00	47.81
December	330,248	31,868,091	314,437	32,295,410	5.03	-1.32
Robusta	280,603	24,990,250	243,160	23,206,944	15.40	7.68
Arabica	49,645	6,877,841	71,277	9,088,466	-30.35	-24.32
November	439,505	42,266,045	401,447	41,123,564	9.48	2.78
Robusta	336,366	30,420,946	291,540	28,108,844	15.38	8.23
Arabica	103,139	11,845,098	109,907	13,014,720	-6.16	-8.99
October	378,931	36,946,329	353,205	35,083,657	7.28	5.31
Robusta	303,764	28,157,324	245,342	23,415,324	23.81	20.25
Arabica	75,167	8,789,005	107,863	11,668,333	-30.31	-24.68

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

EXPORTING COMPANY	POSITION HELD IN MAY	QUANTITY (Bags)			PERCENTAGE MARKET SHARE	
		Robusta	Arabica	Total	Individual	Cumulative
Total		344,438	75,935	420,373	100.00	
1 Kyagalanyi Coffee Ltd	1	37,370	40,560	77,930	18.54	18.54
2 Olam Uganda Ltd	3	36,908	11,133	48,041	11.43	29.97
3 Ideal Quality Commodities Ltd	5	45,590		45,590	10.85	40.81
4 Ugacof (U) Ltd	2	40,005		40,005	9.52	50.33
5 Kawacom (U) Ltd	4	23,467	5,574	29,041	6.91	57.24
6 Louis Dreyfus Company (U) Ltd	6	18,112	4,250	22,362	5.32	62.56
7 Ibero (U) Ltd	9	22,676		22,676	5.39	67.95
8 Touton Uganda Limited	7	16,690	3,835	20,525	4.88	72.83
9 Kampala Domestic Store Ltd	8	16,996		16,996	4.04	76.88
10 Besmark Coffee Company Limited	11	15,605	1,280	16,885	4.02	80.89
11 Great Lakes Coffee Company Ltd	18		5,156	5,156	1.23	82.12
12 The Edge Trading (U) Ltd	27	7,652		7,652	1.82	83.94
13 Export Trading Company (U) Ltd		8,280		8,280	1.97	85.91
14 Bakhsons Trading Co. (U) Ltd	19	6,864		6,864	1.63	87.54
15 Discovery Trading Limited	17	6,164	320	6,484	1.54	89.08
16 Coffee World Ltd	15	5,516		5,516	1.31	90.40
17 Mbale Importers & Exporters Ltd	23	4,744	320	5,064	1.20	91.60
18 Ankole Coffee Producers Coop Union Ltd	13	3,788		3,788	0.90	92.50
19 Commodity Solutions (U) Ltd	16	3,600	668	4,268	1.02	93.52
20 Tata Uganda Limited	22	5,400		5,400	1.28	94.80
21 Grainpulse Ltd	10	3,951	320	4,271	1.02	95.82
22 Darley Investments Ltd	26	3,648	320	3,968	0.94	96.76
23 Nakana Coffee Factory Ltd	24	4,534		4,534	1.08	97.84
24 Sena Indo Uganda Limited	20	3,160	650	3,810	0.91	98.75
25 Zombo Coffee Partners Limited			340	340	0.08	98.83
26 Kaweri Coffee Plantation	12	1,060		1,060	0.25	99.08
27 Kibinge Coffee Farmers' Coop Soc Ltd	30	640		640	0.15	99.23

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EXPORTING COMPANY	POSITION HELD IN MAY	QUANTITY (Bags)		Percentage Market Share		
		Robusta	Arabica	Total	Individual	Cumulative
28 Bukonzo Joint Co-operative Union Ltd			320	320	0.08	99.31
29 Gorilla Summit Coffee Development		320		320	0.08	99.38
30 Ishaka Quality Commodities Ltd	21	700		700	0.17	99.55
31 Gisha Coffee Ltd		668		668	0.16	99.71
32 Friends Of Mothers Initiative Ltd	32		320	320	0.08	99.79
33 Mountain Harvest Smc Limited			320	320	0.08	99.86
34 Klu (U) Ltd		330		330	0.08	99.94
35 Gumutindo Coffee Coop Enterprise Ltd			93	93	0.02	99.96
36 Chanzo Coffee Ltd			90	90	0.02	99.98
Mount Elgon Coffee & Honey						
37 Cooperative			66	66	0.02	100.00

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

DESTINATION	POSITION HELD IN MAY	QUANTITY (60kg bags)			%AGE MARKET SHARE	
		Robusta	Arabica	Total	Individual	Cumulative
Total		344,438	75,935	420,373	100.00	
1 Italy	1	110,594	20,059	130,653	31.08	31.08
2 Sudan	2	95,550	700	96,250	22.90	53.98
3 Germany	3	29,540	17,936	47,476	11.29	65.27
4 Belgium	7	21,592	6,165	27,757	6.60	71.87
5 India	4	22,430	3,595	26,025	6.19	78.06
6 Spain	6	23,762	980	24,742	5.89	83.95
7 Mexico	15	14,650		14,650	3.49	87.43
8 United States	5	3,066	10,256	13,322	3.17	90.60
9 Morocco	8	7,245	1,290	8,535	2.03	92.63
10 Israel	10	4,800	2,600	7,400	1.76	94.39
11 Netherlands	9	720	3,654	4,374	1.04	95.44
12 Portugal	14	2,719		2,719	0.65	96.08
13 China	13	970	680	1,650	0.39	96.47
14 Sweden	22		1,440	1,440	0.34	96.82
15 South Korea	11	320	1,050	1,370	0.33	97.14
16 Canada		320	960	1,280	0.30	97.45
17 Finland		1,280		1,280	0.30	97.75
18 Russia	12	1,280		1,280	0.30	98.06
19 Japan	18	640	480	1,120	0.27	98.32
22 France	28		960	960	0.23	98.55
21 Kenya			960	960	0.23	98.78
22 Greece	17	360	334	694	0.17	98.94
23 Australia	25		653	653	0.16	99.10
24 Turkey	27	640		640	0.15	99.25
25 South Africa			620	620	0.15	99.40
26 Vietnam	23	580		580	0.14	99.54
27 Poland	26	360		360	0.09	99.62
28 Croatia	16	350		350	0.08	99.71

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

DESTINATION	POSITION HELD IN MAY	QUANTITY (60kg bags)			%AGE MARKET SHARE	
		Robusta	Arabica	Total	Individual	Cumulative
29 Egypt		350		350	0.08	99.79
30 Ireland		320		320	0.08	99.87
31 United Kingdom			320	320	0.08	99.94
32 New Zealand			150	150	0.04	99.98
33 Czech Republic			93	93	0.02	100.00

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

BUYERS	POSITION HELD IN MAY	QUANTITY (60kg BAGS)			%AGE MARKET SHARE	
		Robusta	Arabica	Total	Individual	Cumulative
Total		344,438	75,935	420,373	100.00	
1 Olam International	3	45,980	10,173	56,153	13.36	13.36
2 Altasheel	4	46,900		46,900	11.16	24.51
3 Volcafe	1	15,770	23,615	39,385	9.37	33.88
4 Sucafina	2	36,297	960	37,257	8.86	42.75
5 Bernhard Rothfos	6	22,676		22,676	5.39	48.14
6 Ecom Agro Industrialist	5	17,218	4,934	22,152	5.27	53.41
7 Cofftea	8	19,250		19,250	4.58	57.99
8 Aldwami Co	7	15,720		15,720	3.74	61.73
9 Bercher Coffee Consulting	12	11,277	1,280	12,557	2.99	64.72
10 Coex Coffee International	14	9,258	668	9,926	2.36	67.08
11 Hamburg Coffee	17	8,772	960	9,732	2.32	69.39
12 Grb	13		9,720	9,720	2.31	71.70
13 Strauss	29	2,730	6,470	9,200	2.19	73.89
14	18	8,760		8,760	2.08	75.98
15 Elmathahib	19	7,350		7,350	1.75	77.73
16 Luigi Lavazza	11	6,700		6,700	1.59	79.32
17 Tata Coffee	21	5,400		5,400	1.28	80.60
18 Jacobs Douwe Egberts		4,680		4,680	1.11	81.72
19 Pacorini Silocaf		3,560	1,050	4,610	1.10	82.81
20 Louis Dreyfus	20	4,190		4,190	1.00	83.81
21 Ccl Products	22	4,150		4,150	0.99	84.80
22 Nkg Bero Italia		3,708		3,708	0.88	85.68
23 Masiques		3,600		3,600	0.86	86.54
24 Tropical Gmbh	9	3,398		3,398	0.81	87.34
25 Touton Geneve		2,240	668	2,908	0.69	88.04
26 Sobhy Nachly & Sons		2,240		2,240	0.53	88.57
27 Nestle Portugal		2,160		2,160	0.51	89.08
28 Alkolkhi	28	1,750		1,750	0.42	89.50
29 Hafco Trading		1,750		1,750	0.42	89.92
30 Others		26,954	15,437	42,391	10.08	100.00

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