

Key Highlights



A total of 447,162 60-kilo bags of coffee valued at US\$ 64.1 million were exported in November 2022 at an average price of US\$ 2.39/kilo US cents 6 lower than US\$ 2.45 /kilo in October 2022, and US cents 13 higher than US\$ 2.26/kilo in November 2021. This was a decrease of 15% and 10% in quantity and value respectively compared to the same month last year.



Farm-gate prices for Robusta Kiboko averaged UGX 2,400 per kilo; FAQ UGX 6,400 per kilo, Arabica parchment UGX 9,500 per kilo and Drugar UGX 8,500 per kilo.



Coffee exports for 12 months (December 2021-November 2022) totaled 5.78 million bags worth US\$ 875.74 million compared to 6.65 million bags worth US\$ 680.86 million the previous year (December 2020 – November 2021). This represents a decrease of 14% in quantity but an increase of 29% in value.



77% of the total volume was exported by 10 exporters, out of 50 that performed during the month compared to 75% in October 2022.

Sustainable Arabica Sipi Falls fetched the highest price at US \$ 5.00 per kilo.

1. Coffee exports

Coffee exports in November 2022 amounted to 447,162 60-kilo bags worth US\$ 64.14 million as shown in Fig 1. This comprised 364,875 bags of Robusta valued at US \$45.38 million and 82,287 bags of Arabica valued at US\$ 18.76 million (see Table 1 and Annex 1). This was a decrease of 14.97% and 9.94% 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 (November 2021), Robusta decreased by 16.58% and 11.96% in quantity and value respectively, while Arabica exports also decreased by 7.02% and 4.65% in quantity and value respectively.

The decrease in exports was mainly attributed to lower yields this year that were characterized by drought in most regions for the second consecutive year leading to increased incidences of pests and diseases such as the Coffee Twig Borer and red blister disease. For Arabica, the decrease is due to the off-year cycle characteristic of Arabica coffee production.

Coffee exports for 12 months (December 2021-November 2022) totaled 5.78 million bags worth US\$ 875,74 million compared to 6.65 million bags worth US\$ 680.86 million the previous year (December 2020- November 2021). This represents a decrease of 13.53% in quantity but an increase of 28.62 % in value.

Fig 1: Trend of Total Quantity and Value of Coffee Exported: December 2021- November 2022

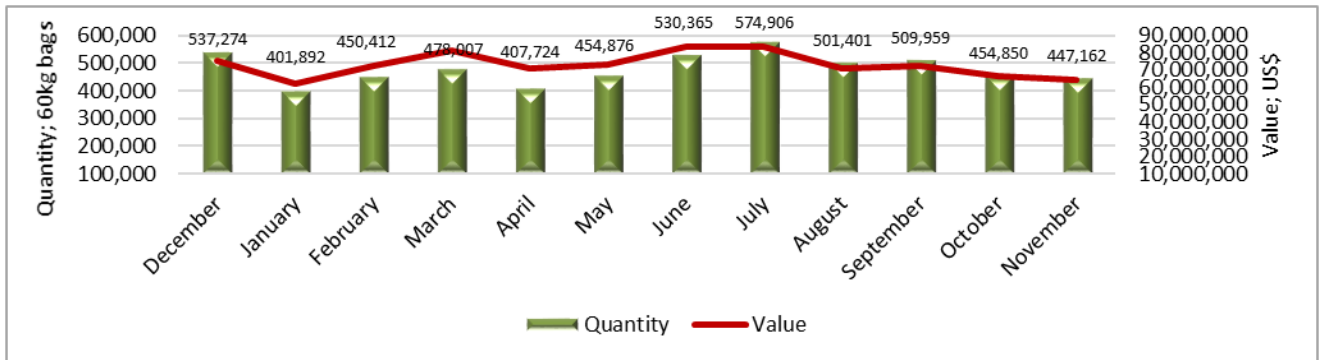


Table1: Comparison of Coffee Exports of November 2021/22 and 2022/23 Coffee Years

Period/Coffee Type	2021/22		2022/23		%age Change	
	Qty(60-kgbag)	Value (US \$)	Qty(60-kgbag)	Value (US \$)	Qty(60-kgbag)	Value (US \$)
November Total	525,915	71,219,460	447,162	64,138,603	↓ -14.97	↓ -9.94
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

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 November 2022. The average export price was US\$ 2.39 per kilo, 6 U.S cent lower than US\$ 2.45 per kilo realized in October 2022. It was 13 US cents higher than in November 2021 (US \$ 2.26/kilo). Robusta exports accounted for 82% of total exports lower than 87% in October 2022. The average Robusta price was US\$ 2.07 per kilo, US cents 16 lower than the previous month. Screen 14 fetched the highest price of US\$ 2.43 per kilo. It was followed by Screen 17 at US\$ 2.29 per kilo. The share of Sustainable/washed coffee to total Robusta exports was only 0.93% lower than 1.95% in October 2022.

Arabica fetched an average price of US\$ 3.80 per kilo, 14 cents lower than US\$ 3.94 per kilo in October 2022. The highest price was Sustainable Arabica (Sipi Falls) sold at US\$ 5.00 per kilo a premium of US cents 45 over conventional Bugisu AA. It was followed by Mt. Elgon AB, C/PB and UG sold at US\$ 4.89 per kilo, a premium of US\$ 1.04 over Conventional Bugisu AA. Drugar was sold at US\$ 3.91 per kilo, a discount of US cents 35 from Bugisu AA. Drugar exports were 40% of total Arabica exports compared to 49% the previous month. There was generally low global natural Arabica demand during the month which led to low Arabica export prices compared to the previous month. The share of sustainable Arabica exports to total Arabica exports was 17% compared to 4% last month.

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

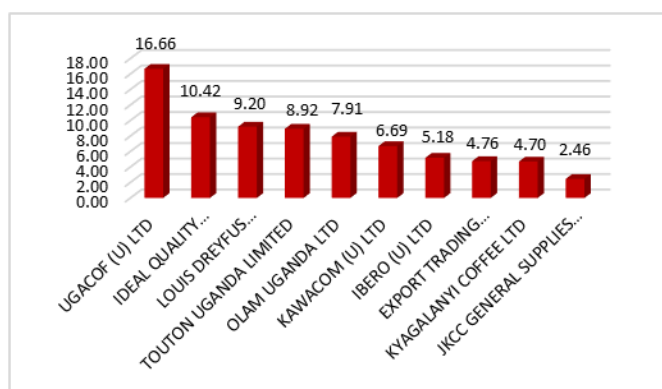
Coffee type	Quantity 60-Kilo Bags	%-age Quantity	Value in US \$	%-age Value	Unit Price US\$/Kilo
Total	447,162		64,138,603		2.39
Washed Robusta	1,070	0.29	141,086	0.31	2.20
Screen 18 Fair Trade	323	0.09	43,152	0.10	2.23
Screen 15 Fair Trade	3,072	0.84	410,415	0.90	2.23
Screen 18	47,746	13.09	6,495,736	14.31	2.27
Screen 17	23,598	6.47	3,239,530	7.14	2.29
Screen 15	159,065	43.59	20,411,742	44.98	2.14
Screen 14	3,340	0.92	486,954	1.07	2.43
Screen 12	68,862	18.87	8,279,740	18.25	2.00
BHP 1199	33,475	9.17	3,222,772	7.10	1.60
Other Robustas	24,324	6.67	2,647,277	5.83	1.81
Total Robusta	364,875	100	45,378,404	100.00	2.07
Organic Bugisu	1,933	2.35	526,570	2.81	4.54
Sustainable Arabica Sipi Falls	2,599	3.16	779,715	4.16	5.00
Organic Okoro	2,780	3.38	757,955	4.04	4.54
Organic Drugar	1,430	1.74	225,630	1.20	2.63
Mt Elgon A+	5,228	6.35	1,335,615	7.12	4.26
Mt Elgon AA	220	0.27	60,020	0.32	4.55
Mt Elgon AB	35	0.04	10,278	0.05	4.89
Mt Elgon CPB	11	0.01	3,230	0.02	4.89
Mt Elgon UG	10	0.01	2,937	0.02	4.89
Bugisu A+	720	0.87	207,935	1.11	4.81
Bugisu AA	14,400	17.50	3,701,626	19.73	4.28
Bugisu A	1,320	1.60	311,669	1.66	3.94
Bugisu AB	6,592	8.01	1,789,880	9.54	4.53
Wugar	6,102	7.42	1,408,349	7.51	3.85
Drugar	31,348	38.10	6,730,914	35.88	3.58
Other Arabicas	7,559	9.19	907,879	4.84	2.00
Total Arabica	82,287	100.00	18,760,200	100.00	3.80

3. Individual Exporter Performance

Figure 2 shows the top 10 export companies in the month of November 2022. Ugacof (U) Ltd had the highest market share of 16.66% compared to 13.89% in October 2022. It was followed by Ideal Quality Commodities Ltd 10.42% (10.94%); Louis Dreyfus Company (U) Ltd 9.20% (10.94%) Touton Uganda Limited 8.92% (4.84%); Olam Uganda Ltd 7.91% (10.25%), Kawacom (U) Ltd 6.69% (4.85%); Ibero(U) Ltd 5.1% (5.04%); Export Trading Company (U) Ltd 4.76% (3.86%); Kyagalanyi Coffee Ltd 4.70% (7.16%); and JKCC General Supplies Ltd 2.46% (2.03%) *The figures in brackets represent percentage market share held in October 2022.

The top 10 exporters held a market share of 77% higher than 75% the previous month reflecting increasing concentration. Changes in exporter positions compared to last month show competition at this level. Out of the 50 exporters that performed, 13 exported Robusta Coffee only while 10 exported Arabica coffee only. **Annex 2** shows a detailed list of exporters' performance in November 2022.

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 November 2022 are shown in **Fig 3** (details in **Annex 3**). Italy maintained the highest market share with 34.40% compared with 33.04% last month. It was followed by Germany 10.85% (11.44%), Sudan 10.04% (5.96%) India 9.93% (9.10%) and Morocco 6.67% (5.67%). **The figures in brackets represent percentage market share held in October 2022.* The first 10 major destinations of Uganda coffee took a market share of 87.15% compared to 85.69 % last month. Coffee exports to Africa amounted to 83,187 bags, a market share of 19% compared to 63,899 bags (14%) the previous month. African countries that imported Uganda coffee included Sudan, Morocco, South Africa, Egypt, Tanzania Algeria and Kenya. Europe remained the main destination for Uganda’s coffees with a 63% imports share, lower than 66% in October 2022.

5. Foreign buyers of Uganda Coffee

Annex 4 shows a list of Ugandan coffee foreign buyers in November 2022. The top 10 buyers held a market share of 67% of total exports the same as the previous month. Sucafina led with a market share of 15.27% compared to 13.35% in October 2022. It was followed by Louis Dreyfus 9.20% (11.38%); Touton Geneve 8.92%;(4.84%); Olam International 8.56% (10.74%) Ecom Agro Industrialist 7.15% (5.15%); Bernhard Rothfos 5.18% (5.04%); Altasheel Import & Export Enterprises 3.99%; (3.44%) Volcafe 3.51% (5.52%), Bercher Coffee Consulting 3.04% and Icona Cafe 2.31% (3.26%).

Note: The figures in brackets represent percentage performance in the previous month – October 2022.

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

Fig 3: Top ten destinations of Uganda’s coffee for November 2022.

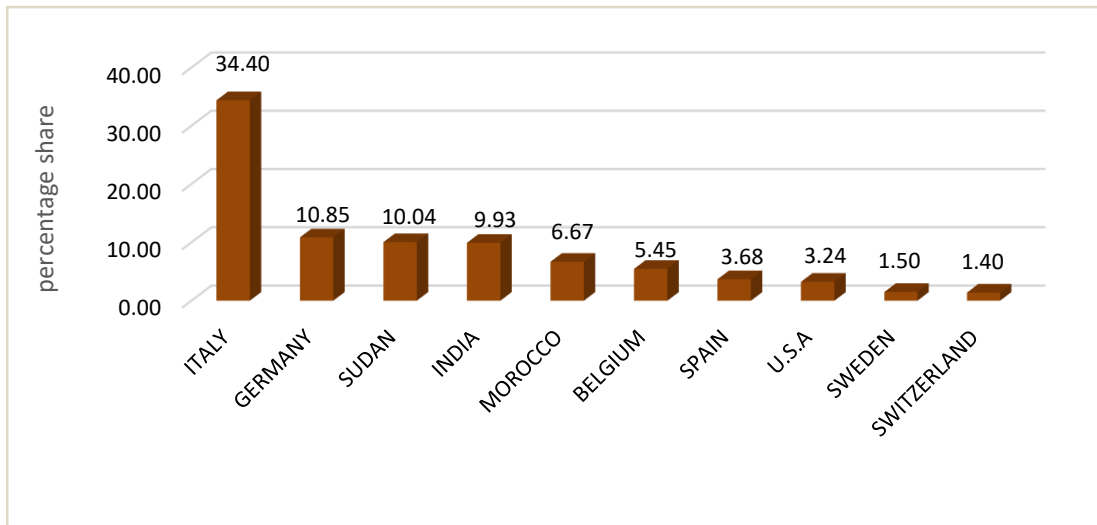
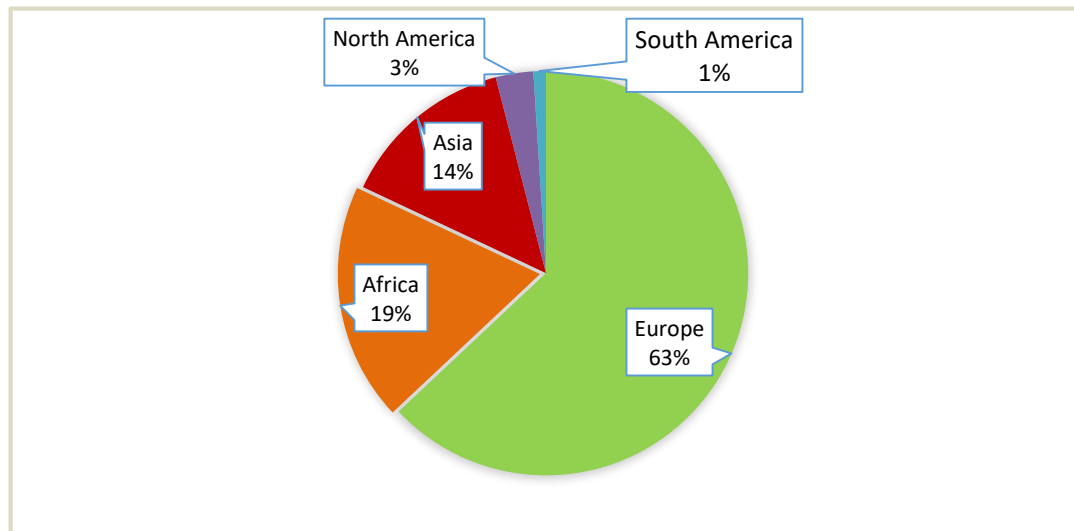


Fig 4: Market share by continent of Uganda’s coffee exports in November 2022.



6. Global Situation

World coffee production for 2022/23 is forecast to increase by 7.8 million bags to reach 175 million bags, as Brazil's Arabica crop enters the on year of the biennial production cycle. Global consumption is expected to increase by 1.81 million bags to 167 million with the largest increase expected in European Union, U.S.A, Japan and Brazil. World exports are forecast to be higher on gains in Brazil and Indonesia. Ending stocks are expected to be 2.1 million bags higher than last year to 34.7 million bags following last year's sharp drawdown. A new global outlook will be released in December 2022 (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.2,200-2,600/= per kilo of Kiboko (Robusta dry cherries); Shs. 6,300-6,500/= 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 2,400/= per kilo; FAQ UGX 6,400/= per kilo, Arabica parchment UGX 9,500/= per kilo and Drugar UGX 8,500/= per kilo.

8. Coffee Development and Promotional Activities

During the month of November 2022, most parts of the country received sufficient rainfall supporting planting of new coffee areas and improved survival rate. By close of the month a total of 26,783,630 coffee plantlets were distributed across 6 major coffee growing regions except Elgon and Northern Region, due to unpredictable weather in the two regions. The plantlets were distributed as follows: 15,992,706 of Arabica seedlings and 10,790,924 of CWDr of Robusta coffee. The major pests and disease incidence recorded included BCTB in most regions. Coffee Leaf Rust was evident in Rwenzori, Elgon and Northern. Red blister was in Western, Eastern and Greater Masaka, while Antestia bugs, Root Mealybugs and Stem borers are were commonly identified in Elgon region. 92 farmer trainings were conducted benefitting 2253 farmers (1836 Male ,417 Female and 211 Youth), while 509 farm visits were conducted across all the regions reaching 1832 farmers (1529 Male ,303 Female and 158 Youth). As the demand for soil improvements is increasing, collected and analyzed a total of 25 soil samples in Gulu, Omoro, Apac, Kwanja, and Lira. The findings indicated a general deficiency of Organic matter and Phosphorous across the soils analyzed. To supplement group and farmer to-farmer extension a total of 15 radio talk shows were conducted across regions and the main focus was sensitization on coffee regulations, National coffee act, harvesting, post-harvest handling and soil conservation measures. As a measure to enhance quality and compliance to coffee standards, a total of 118 factories inspections were conducted: (40 in Central, 17 in Western, 61 in Southwestern); 58 stores (26 in Elgon, 32 in Central); 33 traders in Western; 2 wet mills in Elgon; 2 roasters and 2 grading mills in Central. However, 5 factories were sealed in Southwestern for non-compliance. Registered 96 stores (11 in Eastern, 25 in Elgon, 60 in Central); 54 hullers (53 in Central, 1 in Eastern); 76 buyers (70 in Central,6 in Elgon); 5 wet mills in Elgon and 1 roaster in Eastern region.

9. Outlook for December 2022

Coffee exports are projected to be 500,000 bags. The main harvesting season in Central and Eastern regions started in November and will peak in December and January. The Arabica season in South West and Eastern regions (including Mt. Elgon) started in October 2022.

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

Coffee Year	2021/22		2022/23		%age Change	
	Quantity	Value \$	Quantity	Value \$	Quantity	Value \$
Grand Total	1,010,874	132,317,226	902,012	130,876,281	-10.77	-1.09
Total Robusta	863,571	101,076,839	761,423	98,341,868	-11.83	-2.71
Total Arabica	147,303	31,240,386	140,589	32,504,414	-4.56	4.05
November	525,915	71,219,460	447,162	64,138,603	-14.97	-9.94
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
October	484,959	61,097,766	454,850	66,737,678	-6.21	9.23
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: November 2022

EXPORTING COMPANY	POSITION HELD IN OCTOBER	QUANTITY (Bags)			PERCENTAGE MARKET SHARE	
		Robusta	Arabica	Total	Individual	Cumulative
Total		364,875	82,287	447,162	100	
1 Ugacof (U) Ltd	1	68,680	5,810	74,490	16.66	16.66
2 Ideal Quality Commodities Ltd	3	43,515	3,059	46,574	10.42	27.07
3 Louis Dreyfus Company (U) Ltd	2	40,510	640	41,150	9.20	36.28
4 Touton Uganda Limited	8	26,549	13,358	39,907	8.92	45.20
5 Olam Uganda Ltd	4	26,760	8,597	35,357	7.91	53.11
6 Kawacom (U) Ltd	7	17,961	11,972	29,933	6.69	59.80
7 Ibero (U) Ltd	6	23,182		23,182	5.18	64.99
8 Export Trading Company (U) Ltd	9	21,005	283	21,288	4.76	69.75
9 Kyagalanyi Coffee Ltd	5	14,623	6,388	21,011	4.70	74.45
10 JKCC General Supplies Ltd	14	10,024	960	10,984	2.46	76.90
11 Darley Investments Ltd	16	7,327	2,260	9,587	2.14	79.05
12 Coffee World Ltd	12	7,736	1,727	9,463	2.12	81.16
13 Besmark Coffee Company Limited	17	2,074	7,360	9,434	2.11	83.27
14 Ankole Coffee Producers Coop Union Ltd	15	6,903	1,080	7,983	1.79	85.06
15 Sena Indo Uganda Limited	18	6,077	1,080	7,157	1.60	86.66
16 Grainpulse Ltd	10	4,380	1,340	5,720	1.28	87.94
17 Discovery Trading Limited	22	4,734		4,734	1.06	89.00
18 Xag Coffee Exporters	28	4,244		4,244	0.95	89.94
19 Commodity Solutions (U) Ltd	11	3,009	1,170	4,179	0.93	90.88
20 Zigoti Coffee Works Ltd	41	3,574	2	3,576	0.80	91.68
21 Kampala Domestic Store Ltd	23	3,250		3,250	0.73	92.41
22 Bakhsons Trading Co. (U) Ltd	13	3,058		3,058	0.68	93.09
23 The Edge Trading (U) Ltd	20	1,042	1,960	3,002	0.67	93.76
24 Agri Evolve	24		2,600	2,600	0.58	94.34
25 Jber Coffee Ltd		2,450	150	2,600	0.58	94.92
26 Abbarci Industries Limited	19	2,247	183	2,430	0.54	95.47
27 Gisha Coffee Ltd	31		2,342	2,342	0.52	95.99

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Exporting Company	POSITION HELD IN OCTOBER	QUANTITY (Bags)		Percentage Market Share		
		Robusta	Arabica	Total	Individual	Cumulative
28 Great Lakes Coffee Company Ltd	25	1,414	710	2,124	0.47	96.47
29 Hermes Coffee Factory Ltd		1,346	673	2,019	0.45	96.92
30 Rezlex Investment Ltd	37	339	1,336	1,675	0.37	97.29
31 Mbale Importers & Exporters Ltd	27		1,550	1,550	0.35	97.64
32 Banyankole Coffee Services		1,080		1,080	0.24	97.88
33 Kaweri Coffee Plantation	30	1,070		1,070	0.24	98.12
34 Bakwanye Trading Co. Ltd	29		1,040	1,040	0.23	98.35
35 Prime African Coffee Initiative	42	350	683	1,033	0.23	98.58
36 Nakana Coffee Factory Ltd	34	1,002		1,002	0.22	98.81
37 Tata Uganda Limited	21	900		900	0.20	99.01
38 Sukuma Commodities Limited		668		668	0.15	99.16
39 Seth & Cushman Market Traders Ltd		320	340	660	0.15	99.31
40 Karaz Coffee Factory	35	600		600	0.13	99.44
41 Bufumbo Organic Farmers Association			400	400	0.09	99.53
Kayunga Nile Coffee Farmer's Co-operative Society Ltd	36	350		350	0.08	99.61
43 Superbia International Coffee Trade Ltd		50	300	350	0.08	99.69
44 Brecoff International Company Ltd			334	334	0.07	99.76
45 Bukonzo Joint Co-operative Union Ltd	33		320	320	0.07	99.83
Kibinge Coffee Farmers' Coop Society Ltd		320		320	0.07	99.90
47 Funzo Coffee (U) Ltd		152	146	298	0.07	99.97
48 Mt Elgon Agroforestry Communities	45		126	126	0.03	100.00
48 Nucafe	40		6	6	0.00	100.00
50 Carico Café Connoisseur Limited			2	2	0.00	100.00

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

DESTINATION	POSITION HELD IN OCTOBER	QUANTITY (60kg bags)			%AGE MARKET SHARE	
		Robusta	Arabica	Total	Individual	Cumulative
Total		364,875	82,287	447,162	100	
1 Italy	1	139240	14566	153806	34.40	34.40
2 Germany	2	36318	12185	48503	10.85	45.24
3 Sudan	5	44900		44900	10.04	55.28
4 India	3	38345	6059	44404	9.93	65.21
5 Morocco	6	29810		29810	6.67	71.88
6 Belgium	4	13467	10913	24380	5.45	77.33
7 Spain	7	14458	1987	16445	3.68	81.01
8 United States Of America	8	1680	12826	14506	3.24	84.25
9 Sweden	15	2160	4560	6720	1.50	85.76
10 Switzerland	37	5284	960	6244	1.40	87.15
11 United Arab Emirates	16	4327	1463	5790	1.29	88.45
12 Turkey	10	4275	1000	5275	1.18	89.63
13 Estonia	36	4160	640	4800	1.07	90.70
14 China	18	3200	988	4188	0.94	91.64
15 Israel	14	3640		3640	0.81	92.45
16 South Korea	28	472	3117	3589	0.80	93.25
17 Ecuador		3420		3420	0.76	94.02
18 South Africa		480	2836	3316	0.74	94.76
19 Georgia	27	2616	320	2936	0.66	95.42
20 Russia	19	1600	980	2580	0.58	95.99
21 United Kingdom	25	640	1639	2279	0.51	96.50
22 Tanzania	29		2190	2190	0.49	96.99
23 France	13	1876		1876	0.42	97.41
24 Portugal	20	1050	660	1710	0.38	97.80
25 Egypt	22	1357	350	1707	0.38	98.18
26 Greece	30	1400		1400	0.31	98.49
27 Romania	32	1400		1400	0.31	98.80

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

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

Destination	POSITION HELD IN OCTOBER	QUANTITY (60kg Bags)			%Age Market Share	
		Robusta	Arabica	Total	Individual	Cumulative
28 Finland		960		960	0.21	99.02
29 Japan	17	640	280	920	0.21	99.22
30 Algeria		668		668	0.15	99.37
31 Singapore			640	640	0.14	99.52
32 Kenya	34		596	596	0.13	99.65
33 Jordan	33	350	210	560	0.13	99.78
34 Croatia	23	360		360	0.08	99.86
35 Netherlands	9	322		322	0.07	99.93
36 Canada			320	320	0.07	100.00
37 Saudi Arabia	31		2	2	0.00	100.00

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

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

BUYERS	POSITION HELD IN OCTOBER	QUANTITY (60kg BAGS)		%AGE MARKET SHARE		
		Robusta	Arabica	Total	Individual	Cumulative
Total		364,875	82,287	447,162	100.00	
1 Sucafina	1	62,470	5,810	68,280	15.27	15.27
2 Louis Dreyfus	2	40,510	640	41,150	9.20	24.47
3 Touton Geneve	7	26,549	13,358	39,907	8.92	33.40
4 Olam International	3	29,679	8,597	38,276	8.56	41.96
5 Ecom Agro Industrialist	5	20,311	11,652	31,963	7.15	49.10
6 Bernhard Rothfos	6	23,182		23,182	5.18	54.29
7 Altasheel Import & Export	9	17,850		17,850	3.99	58.28
8 Volcafe	4	11,298	4,418	15,716	3.51	61.80
9 Bercher Coffee Consulting		6,214	7,360	13,574	3.04	64.83
10 Icona Café	10	8,554	1,787	10,341	2.31	67.14
11 Vidya Herbs	15	9,900		9,900	2.21	69.36
12 Hamburg Coffee		6,984	1,780	8,764	1.96	71.32
13 Jacobs Douwe Egberts	14	8,640		8,640	1.93	73.25
14 Elmathahib	26	7,700		7,700	1.72	74.97
15 Walter Matter	11	6,506	668	7,174	1.60	76.58
16 Transgo	18	7,100		7,100	1.59	78.16
17 Sucden Coffee		4,912	960	5,872	1.31	79.48
18 Strauss	12	3,575	1,720	5,295	1.18	80.66
19 Cofftea (Sudan)	27	5,250		5,250	1.17	81.83
20 Koninklijke Douwe		4,320		4,320	0.97	82.80
21 Bijdendijk	17	1,318	2,950	4,268	0.95	83.76
22 Eurocaf Sas	13	3,646	334	3,980	0.89	84.65
23 Khaleed		3,500		3,500	0.78	85.43
24 Lanco Comercio	19	3,420		3,420	0.76	86.19
25 CCL Products			3,059	3,059	0.68	86.88
26 N V Group Sopex		3,006		3,006	0.67	87.55
27 Dek Berlin		1,800	1,080	2,880	0.64	88.19
28 SLN Coffee Ltd		2,665		2,665	0.60	88.79
29 Aldwami Co		2,450		2,450	0.55	89.34
30 Others		31,566	16,114	47,680	10.66	100.00

Compiled by: Directorate of Strategy and Business Development
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