

# The Future of Uganda Coffee

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..... So Bright but so Frightening....

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Presented at Bird Friendly Discussion Forum

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- Uganda is ranked as the first Commonwealth producer of coffee in the world.
- 8<sup>th</sup> world producer.
- 2<sup>nd</sup> African producer.
- 1<sup>st</sup> exporter in Africa.



## Uganda's Position in Production & Export





# Uganda Coffee Industry

Today

=A Snapshot=

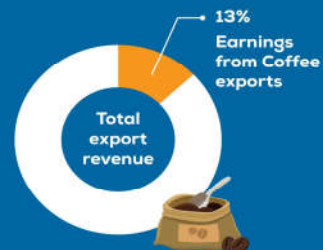
- Number of farming families
- Exports (2019/2020)
- Revenue (2019/2020)
- Road Map
- New Coffee Law

UGANDA HAS 1.8  
MILLION COFFEE  
FARMERS, 18% OF  
THE WORLD'S TOTAL

DID UGANDA EARN UGX 1.8 TRILLION  
COFFEE EXPORTS IN 2019/2020?



Earnings in 2019/2020 accounted for  
13% of Uganda's total export revenue



Uganda's Coffee Export Volume & Value  
have been increasing since 2014



Source: Bank of Uganda, 2019

## Coffee Roadmap: Nine key initiatives to catalyze transformation

Initiative	
Demand & value addition	1 Build structured demand through country-to-country deals, especially with China
	2 Brand Uganda coffee to drive demand and improve value by up to 15%
	3 Support local coffee businesses for value addition, including primary processing and a soluble coffee plant
Production	4 Strengthen farmer organisations and producer co-operatives to enhance commercialization for smallholder farmers and ensure broad access to extension, inputs, finance, and aggregation
	5 Support joint ventures between middle-class owners of underutilized land and investors to develop coffee production
	6 Provide and promote concessions for coffee production on large underutilized tracts of land
Enablers	7 Improve quality of planting material (seeds and seedlings) through strengthened research and multiplication of improved varieties
	8 Improve access to quality inputs by reducing counterfeiting (fertilizer, pesticides, herbicides) from current 40-60%
	9 Develop coffee finance programme with Central Bank and Treasury to provide financing to farmer organizations (including on-lending to smallholders), coffee businesses, and investors

SOURCE: Uganda Coffee Lab, McKinsey analysis

April 2017



PESACHECK

# Key Industry Challenges

Water for production  
and the Climate  
change



Access, quality and  
affordability of inputs



Finance access &  
affordability





# Key Opportunities

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## Productivity

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## The Specialty Market

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## Domestic Consumption

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## Risks Today and Tomorrow

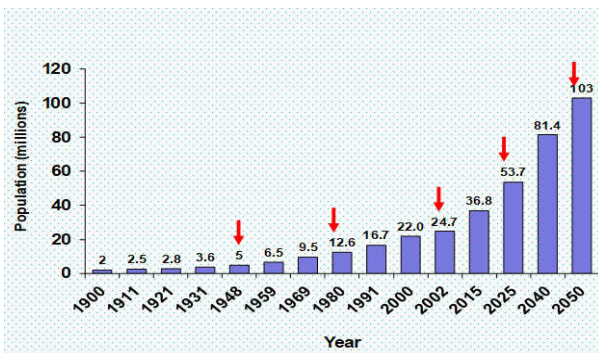
## Aging Farmer

## Environmental Degradation [Climate Change]

## Emerging Diseases and Pests



## Growing Population





Future Looks  
Promising



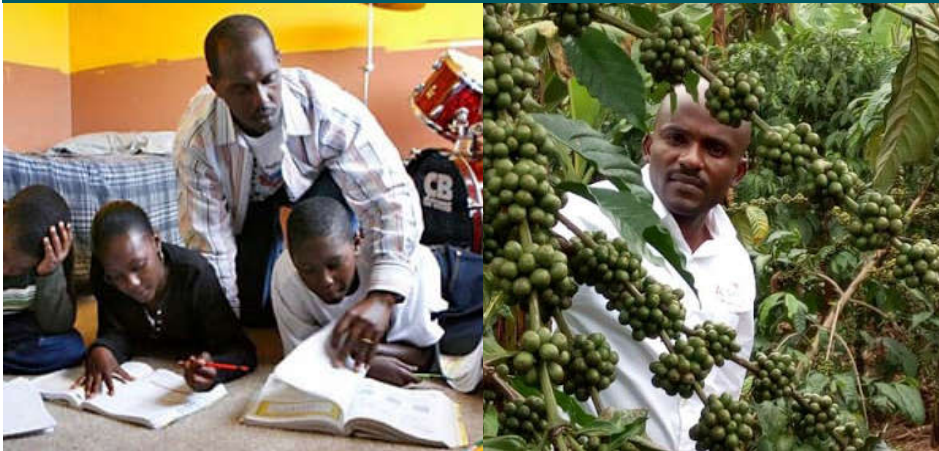
Volume Increasing



Farmer Associations



Specialty Front through Certification and Quality is  
the Future



Climate Change



# CONCLUSIONS

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THANK YOU

