

UGANDA COFFEE PLATFORM
Annual Report 2015



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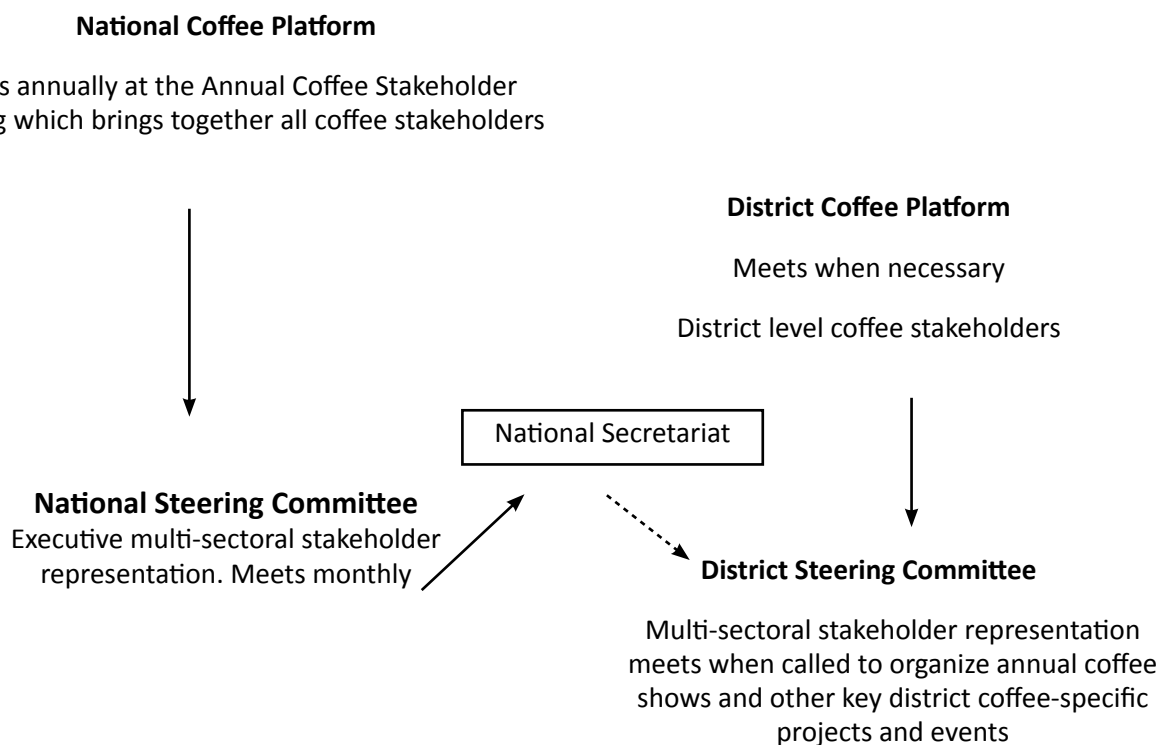


The Uganda Coffee Platform

The Uganda Coffee Platform was established in November 2006 to bring stakeholders together to discuss the challenges facing the coffee sub-sector and to identify strategies to address these in order to increase coffee production in a sustainable manner.

The National Coffee Platform is positioned in line with Uganda's Vision 2040, the Ministry of Agricultural and Animal Industries DSIP (and its successor, ASSP) and also the National Coffee Policy and Coffee Strategic Plan for 2015-2020.

The Coffee Platform Structure



The Coffee Platform has achieved much since its inception in 2007, contributing to the National Coffee Policy launched in December 2013 and the subsequent National Coffee Strategy which will be launched this month. The Platform's Annual Coffee Show schedule has seen an increase in engagement from the original 10 shows in 2008 of just under 4,000 to more than 36,000 in 32 shows in 2015. More than 100,000 farmers through the coffee shows have gained access to inputs, extension knowledge and support which has contributed to the improvement in good agricultural practices throughout Uganda's smallholder farmer network. The Uganda Coffee Platform is a benchmark for other commodity platforms. Opportunities continue to arise for more strategic engagement on key issues across the coffee value chain. As Uganda's leading export crop, we must continue to strengthen this lead.

The present NSC membership includes:

1. Uganda Coffee Development Authority (UCDA) (Chair)
2. Uganda Coffee Farmers Association (UCFA) (Vice Chair)
3. Ministry of Agriculture, Animal Industry and Fisheries (MAAIF)
4. Uganda Coffee Federation (UCF)
5. International Womens Coffee Alliance (IWCA)
6. National Research Organisation/ National Coffee Research Institute (NaCORI)
7. aBi Trust
8. Hanns R. Neumann Stiftung
9. USAID Agriculture Development Partner
10. USAID Enabling Environment Activity
11. USAID Commodity Production and Marketing Activity
12. Uganda National Agro-input dealers Association (UNADA)
13. National Union of Coffee Agribusinesses and Farm Enterprises (NuCAFE)
14. National Agricultural Advisory Services (NAADS)



Uganda's Coffee Performance in Coffee Year 2014/15

Exports

Total exports for Coffee Year (CY) 2014/15 amounted to 3.45 million 60-kilo bags worth US\$ 410.6 million compared to 3.5 million bags valued at US\$ 393.9 million, slightly lower than the previous year in terms of quantity but higher in value (see Charts 1 and 2). This represented a drop of 1.26% in quantity and a rise of 4.22% in value compared to the previous year. The corresponding exports and value in CY 2012/13 were 3.58 million bags, the highest in 15 years and US\$ 433 million respectively. Just like the previous year, the slight drop in exports during CY 2014/15 was attributed to a drought which hit most of the coffee growing regions. The drought also affected Arabica production although it would have been an on-year characteristic of the biennial nature of Arabica production. In spite of this, there has been increased private investment at all levels of the value chain as well as increased planting on account of government's intervention to plant 100 million seedlings per year, for 3 years. The incidence of the Black Coffee Twig Borer (BCTB) intensified with reports indicating prevalence in all Robusta growing districts. UCDA and the National Coffee Research Institute (NaCORI) have worked tirelessly to sensitize farmers on the control methods including demonstrations on use of chemicals. The export prices were slightly higher than the previous year especially at the beginning of the year but kept on decreasing in line with the negative trend of the global prices reflected in the ICO Composite indicator price (Chart 5).

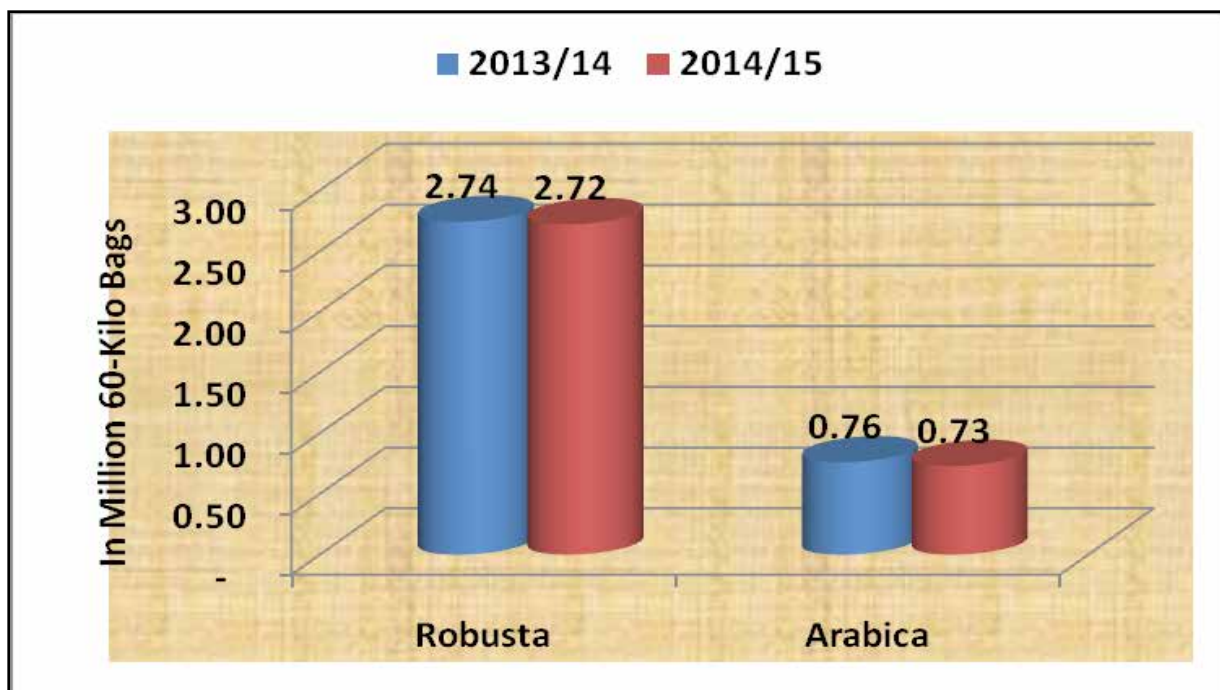


Chart 1: Coffee Export Performance in Coffee Years 2014/15 and 2013/14

Robusta exports amounted to 2,722,636 bags compared to 2,735,020 bags the previous year – a slight drop of 0.45%. The corresponding value was US\$ 288.39 million compared with US \$ 285.62 million, a slight rise of 0.97% the previous year.

Arabica exports totaled 733,216 bags compared to 764,809 bags in CY 2013/14 year representing a 4.13% drop. The corresponding value was US\$ 122.16 million compared to US\$ 108.31 million in CY 2013-14, a rise of 12.79%.

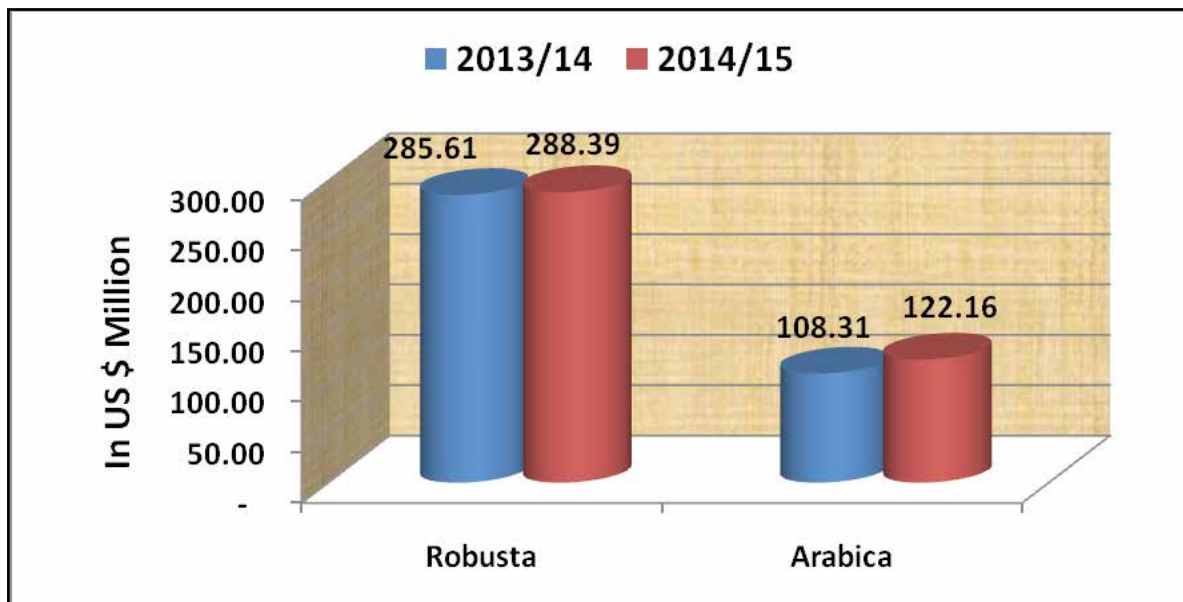


Chart 2: Coffee Value Performance in Coffee Years 2014/15 and 2013/14 in US \$ Million

Chart 3 illustrates the monthly movement of exports by type in CY 2014/15. It reflects increased exports in the second half of the coffee year compared to the first half with a peak in July 2015. A positive trend in export value from May to July is observed on account of increased exports during the period and a reduction in value in August and September as the season reached its tail end.



Chart 3: Monthly Coffee Exports and Value in Coffee Year 2014/15



Prices

Price volatility at the international level continued even this year. This requires players in the coffee value chain to invest in price risk management tools. The World Bank Group, International Coffee Organization and the International Trade Centre are desirous of building capacity of industry actors in this area.

Chart 4 shows average monthly export prices for both Robusta and Arabica for coffee year 2014/15. It reflects narrowing differential between Arabica and Robusta in the second half of the coffee year. This poses a challenge for Uganda which is predominantly a Robusta growing nation since roasters would opt for more Arabica in their blends. It however also points to a need to continue increasing the proportion of Arabica in our production mix if Uganda is to compete favourably at an international level.

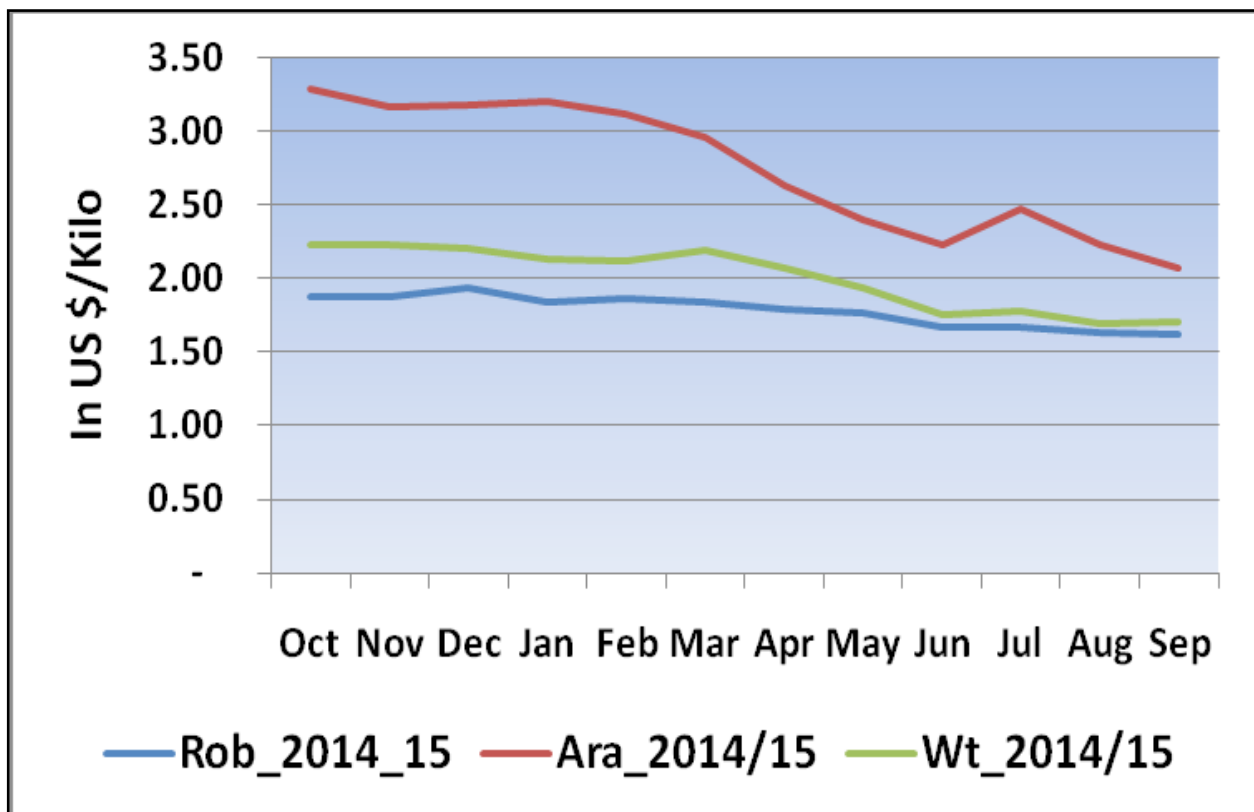


Chart 4: Weighted Average Unit Monthly Unit Export Prices for Coffee Year 2014/15

Chart 5 illustrates the monthly trend of the International Coffee Organization (ICO) composite indicator price. It shows a negative trend from October 2014 to September 2015. It also reflects a narrowing differential between the ICO indicator price and the global Robusta price which may point to a higher global demand for Robusta. The lower ICO indicator prices were on account of weather reports which indicated that the drought damage caused by drought in January - February 2015 on the Brazilian 2015/16 crop was not as intense as anticipated earlier. Based on increased Brazilian exports compared to production during the year pointed to a fact that the Brazilian stocks, though dwindling, had been under declared. Vietnam's farmers are also beginning to release stocks which are likely to affect the 2015/16 global prices negatively.

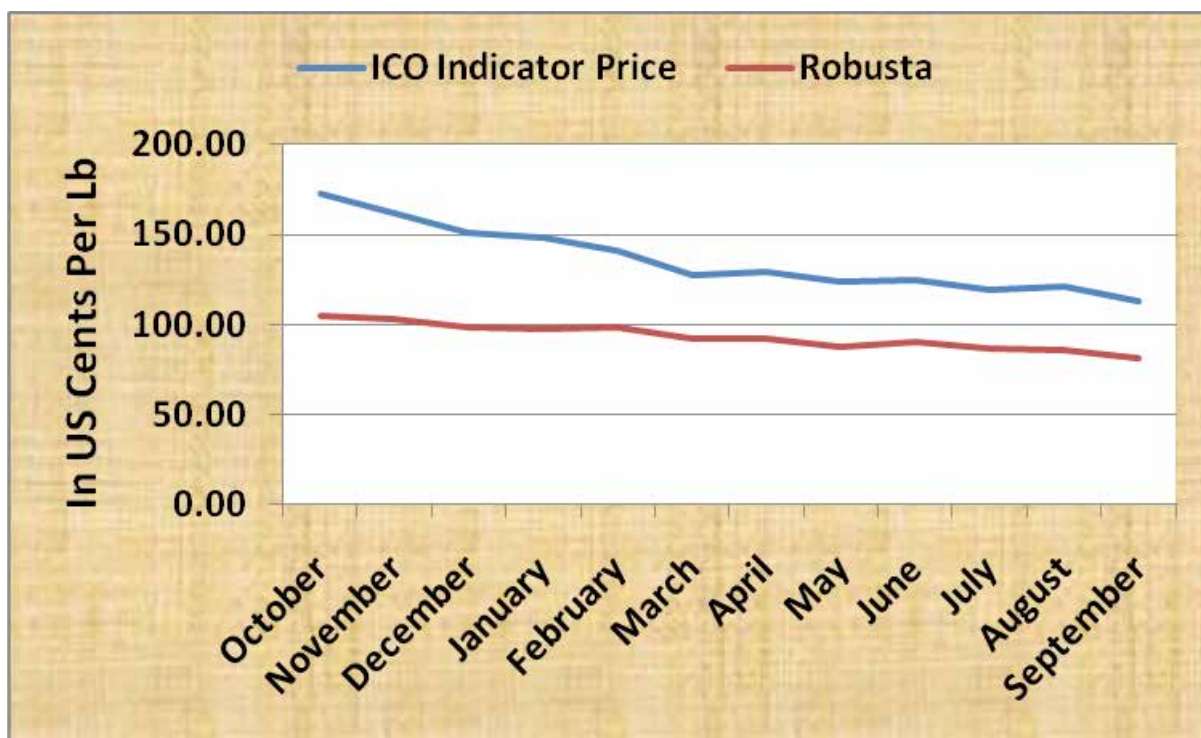


Chart 5: Average Monthly ICO Composite and Global Robusta Prices in CY 2014/15

Production, Research & Coordination

- 68.2 Metric Tonnes of Seed distributed (Robusta-40.4 MT; Arabica-27.8 MT)
- 108.6 million coffee seedlings raised (Robusta-80.8 million; Arabica-27.8 million)
- 85.88 million seedlings planted
- 414,660 households benefited
- Total hectares coverage is 367,469 ha. compared to **338,037** ha. in 2013/14 and 284,624 ha. in CY 2012/13
- 250 one-acre demonstration plots on Good Agricultural Practices (GAPs) established
- 50 coffee farms established to demonstrate soil and water management.
 - 25 farmers supported with polythene sheets
- 1,250 farmers from 25 districts participated in farmer competitions. Best farmers were rewarded with prizes such as solar panels, spray pumps, secateurs, tarpaulins, drying trays, etc. to boost their productivity and also enhance quality.
- Five (5) inter-regional farmer-farmer tours organized during the year for farmers to learn from each other especially on Good Agricultural Practices (GAPs).

Pest and Disease Control

- In collaboration with National Coffee Research Institute (NaCORI) provided technical and financial support to control the spread of the Black Coffee Twig Borer (BCTB). NaCORI is currently carrying out a survey to assess the incidence of the pest.
- In addition, the following carried out during CY 2014/15:
 - Surveillance reports indicate continued spread and infestation by the BCTB
 - 3,000 minutes of radio airtime on 10 radio stations with emphasis on GAPs and management of pests and diseases
 - 34 Integrated Pest Management (IPM) demonstration sites set up

- 3,200 litres of chemicals were used for demonstration with 2,800 acres sprayed
- 40 farmer sensitization training workshops on integrated pest management were held in 5 regions
- Conducted demonstrations on how to combat the pest in all Robusta growing districts

Coffee Development in Northern Uganda

- Distributed 1,259 Kg of seed raising 1.926 million seedlings
- Formed and registered 69 Community Based Nurseries (CBNs)
- Distributed 3.06 MT of polypots
- Planted 510,380 coffee seedlings
- Benefitted 2,600 farmers
- Planted 17,500 shade trees including 6,000 banana suckers for food security and provision of early income
- Marketed 170 MT of Kiboko coffee at an average of Sh. 2,000/= per kilo almost a similar quantity like the previous year at an average price of Sh. 1,500/ per kilo
- Evaluated 1 proposal to establish a processing factory.
- Conducted 5 workshops/seminars for farmers and local leaders on farmer group management
- Conducted 18 Farmer Field Schools (FFS) sessions
- Held 2 Coffee shows one in Gulu and Lira
- Established 10 technology development sites and supported 5 old sites



The Regional Manager, Northern, Mr. Mike Maliro appreciating selective picking from one of the farmers in Northern Uganda

Outcome

- Enhanced capacity of organized farmer groups in Good Agricultural Practices (GAPs), access to agro inputs, improved water management practices and strengthened linkage to researchers through the Farmer Field School (FFS) approach.
- Improved adoption of new technologies by farmers reflected by increased yields and income
- In CY 2014/15 farmers in Northern Uganda sold 169.9 MT of Kiboko Coffee at Sh, 2,000/= per kilo almost similar to 170.3 MT of Kiboko Coffee sold at an average price of UGX. 1,800 per Kg in CY 2013/14. This translated into a farmers' income of UGX 339.98 million.
- Increased production of coffee in the Mid-North has created demand for establishment of a processing facility under the public/private partnership with UCDA and some entrepreneurs to invest in the region.

Quality Assurance / Post-Harvest Handling

At post-harvesting level, the following were registered:

- Registered and licensed over 400 buying stores
- Licensed 431 primary processing factories.
- Registered 9 washing stations
- Registered and licensed 36 export grading plants
- carried out 32 training sessions on quality aspects including coffee regulations benefitting buyers and processors
- Set up 7 task forces for quality improvement in Eastern, Central, South–Western and Western Regions.
- Issued 19,155 ICO Certificates of Origin and Quality Certificates compared to 10,516 last year
- Certified 3.45 million 60-kg bags of coffee for export.

Outcome

- The total volume of exports decreased marginally by 1.3% to 3.45 million bags 60-kg bags on account of drought
- The total foreign exchange from exports proceeds increased by 4.2% to US\$ 410.6 million on account of slightly higher global coffee prices than the previous year
- Coffee farmers earned a total of UGX 1,126 billion.
- Domestic coffee consumption increased by 4%
- Trained local roasters, hoteliers, and café/coffee shop operators in good roasting and brewing practices (Barista).
- Formed 1 and supported 3 coffee clubs in universities

Value Addition and Generic Promotion

To promote Uganda coffee domestically, regionally and internationally, UCDA undertook the following:

- Showcased Ugandan coffee in 6 local trade fairs, namely: Jinja Agricultural show, UMA International Trade Fair, Coffee Day, World Food Day, Corporate League games and Investment Home-is-Best Summit in Northern Uganda. This led to increased domestic consumption of Uganda coffee.



UCDA Staff at Gulu Investment Summit in November 2014

- Showcased Ugandan coffee at the Ugandan North American Association (UNAA) convention, Specialty Coffee Association of Japan (SCAJ), Specialty Coffee Association of America (SCAA) in Seattle, USA, Specialty Coffee Association of Europe (SCAE) in Sweden, African Fine Coffees Association (AFCA) Conference and Exhibition in Kenya, Milano Expo 2015, Italy and World Barista Championship in Seattle, USA. Enhanced penetration into new markets such as the Far East: Korea, Australia and Ecuador.
- There is growth in the roasting capacity with about 20 Ugandan coffee brands on the supermarket shelves. These include: *Good African Coffee; Star Cafe; Crane Coffee; Big Gorilla (hand roasted); Buddu Espresso; Elgon Pride; Masaba; Savanna; Nile Coffee; Zigoti Coffee; Sipi Elgon Cafe*, among others.
- Uganda Vinci Coffee Company Limited is establishing a roasting, manufacturing and packing instant coffee for export and home consumption at Nammanve Industrial Park. A number of coffee grading plants have also been established in the Park reflecting increased investment in the coffee sub-sector.
- In West Nile, Coffee World through Paidha washed Arabica Coffee limited established a factory with a capacity of processing 72 MT of FAQ per day. The facility processed 180 MT of FAQ in last harvesting season.
- Bukonzho Joint Cooperative Society in Kasese established a roasting facility to add value to the members who produce washed Arabica coffee for the specialty coffee market. The capacity is 90 kg per hour.
- Bugisu Cooperative Union established a roasting plant that is currently operated by Kyagalanyi Coffee Ltd
- Kawacom Uganda limited is establishing a washing facility in West Nile with a capacity of processing 100 MT of FAQ per hour.

Strategy and Business Development

The National Coffee Strategy (NCS) was developed to operationalize the National Coffee Policy launched in 2013. The NCS earmarks strategic interventions in 4 pillars viz: Production & Productivity; Quality & Value Addition; Market Development & Intelligence; and Institutional Development & Accountability.

The implementation of the NCS will cost UGX 926 billion over the 5 years. This investment will

generate incremental revenue inflows that will reach UGX 2.57 trillion per year for 7 to 10 years before changing cycle.

UCDA developed a 3-year Corporate Plan 2015/16-2017/18 to contribute to the NCS. The Corporate Plan has 5 thematic areas: Productivity and Productivity; Quality and Value Addition; Market Information and Intelligence; Domestic Coffee Consumption and institutional Development. UCDA and Ministry of Agriculture and Animal Industries and Fisheries (MAAIF) are in the process of reviewing the UCDA Act 1991 with a view of incorporating emerging issues within the coffee value chain. This will be followed by revision of Regulations.

UCDA continued to build capacity of farmer organizations in coffee agribusiness training 50 farmer trainers from NUCAFE and UCFA.



Group Discussions while conducting the TOT Workshops on Coffee Agribusiness

Hosting IACO Annual General Meeting and Second African Coffee Symposium

In November 2014, Uganda hosted the African coffee fraternity in which a Kampala Declaration was signed by delegates of African countries. The theme of the Second African Symposium was **Unlocking the potential of the African Coffee Industry?** where prominent personalities from Latin America, Asia, Europe and Africa presented papers which, if implemented, would enhance the potential of the African coffee industry. Over 20 companies exhibited their products and services during the one-week Annual General Meeting and Symposium.



UCDA stall at the IACO Exhibition, Serena Hotel, Kampala

Lessons Learnt

- During the coffee year, the Authority distributed 68.2 MT of seeds comprising 40.4 MT of Robusta and 27.8 MT of Arabica. A total of 108.6 million seedlings comprising 80.8 million Robusta and 27.8 million Arabica were raised. Through Operations Wealth Creation (OWC) planted 86.5 million seedlings benefitting 435,474 households
- Working with Operation Wealth Creation (OWC) has enhanced UCDA's capacity to distribute coffee seedlings to beneficiaries and also calls for an efficient monitoring mechanism to ensure high survival rates of the planted coffee with an ultimate aim of assessing the results of this intervention at a later stage
- There is still a low farmer extension staff ratio
- Weather mitigation and adaptation measures should be given due attention if the volumes envisaged from replanting are to be realized
- Unfavorable price and exchange rate fluctuations do affect the dollar based revenues

Observed Impacts/outcomes

- Increased demand for coffee seedlings reflected in the uptake of 71 million seedlings supplied in the second rains (August - November) of 2015
- Increased private investment especially in wet mills, motorized pulpers, export grading plants, roasters and espresso coffee machines
- Yield differentials of farmers in groups and those who are not for instance 3 MT/ha Vs 0.5MT/ha for Robusta)
- Increased proportion of farmers in groupings (15% in coffee compared to 5% in the agricultural sector as per the Uganda Census of Agriculture, 2008/09) Report
- Increased farmer trainers in coffee agribusiness
- Increased funding for coffee from government and development partners since coffee is taken as a poverty reduction enterprise benefitting about 1.7 million households out of 3.95 million agricultural households and other actors along the value chain
- Political will with formation of a Parliamentary Coffee Platform to champion the coffee agenda in Parliament - especially on advocacy for increased budget allocation to coffee and farmer mobilization
- Farmers continue to receive 75% of the export price reflected in the farm gate and export prices
- Improved welfare of coffee farmers reflected in the housing status, educated children, improved health care (basic needs) and assets (bicycles, motorcycles, land acquisition, etc.)
- Increased number of cafes and coffee shops-more than 120 outlets in major towns with 20 Ugandan coffee brands on supermarket shelves alongside imported brands
- Increased demand for Uganda's coffee reflected in increased number of buyers
- Increased coffee exports to emerging countries of Asia (Japan, South Korea, China, Singapore, Taiwan, Hong-Kong)-5,537 bags in CY 2010/11 to 127,059 bags in CY 2013/14 and 91,840 bags in CY 2014/15.
- Certified coffees, 131,942 bags valued at \$23 mln (4%)
- Increased funding from both government and development partners due to coffee's strategic nature and a transparent value chain.



Way Forward

1. Enhance extension services delivery and establishing and building capacity of farmers' organisations
2. Expand the middle stratum of commercial farmers
3. Promote institutional and human development and improve accountability
4. Build competitiveness through increased productivity, improved quality and differentiation
5. Enhance inter agency coordination between the various actors in the coffee value chain
6. Promote domestic coffee consumption
7. Build capacity of various institutions in the coffee industry in gender analysis, budgeting and reporting
8. Operationalize a results based monitoring and evaluation system to assess performance of the various interventions of different actors towards realization of the National Coffee Strategy



aBi Trust Supports Uganda's Coffee Sector

aBi

TRUST



aBi Trust Supports Uganda's Coffee Sector

aBi Trust vision for a competitive private sector led coffee industry in Uganda is based on an agribusiness approach, where value chain actors are the beneficiaries. Focus is on sustainability, profitability and impact investment.

Coffee is Uganda's traditional cash crop grown in most parts of the country by small holder farmers and a few large scale farmers, associations or organizations. It is a high impact crop on the incomes of households and is steadily grown for a specialized market.

Interventions by aBi Trust will in the long run build a self-sustaining export led economy for the benefit of all Ugandans.

aBi Trust supports coffee interventions due to the crop's growing demand and potential as a foreign exchange earner due to the fact that it is among the top priority crops that Government is promoting among farmers as a cash crop.

In the financial year 2014/15, Uganda earned USD449 million from coffee, affirming the potential of the crop to the growth of the economy.

Why aBi Trust's intervention

aBi Trust decided to intervene after realizing that the coffee sector was faced with challenges ranging from low quality coffee, lack of market, limited access to improved seeds and agro inputs, low consumption of coffee locally among others.

The interventions in the coffee value chain are financed to improve the performance of the crop focusing on production and productivity, quality enhancement, value addition, market development and access, improving the accessibility of agro inputs and plant materials to farmers in addition to promoting coffee consumption culture in Uganda.

This is done through supporting projects and capacity building through training, provision of quality and the necessary tools needed in coffee farming with an aim of increasing coffee yields.

As a result, a total of 40 projects have been implemented, over 70,000 farmer household have been reached, over 10 business plans from SMEs are being supported, Centers of Excellence (CoE) established and Coffee Wilt Disease Resistant(CWDr) clean planting material is being produced using the Tissue culture laboratory among other achievements.

In addition, 3,000 demonstrations have been established with experts to support the farmers in learning best practices needed in coffee production right from the nursery to the point of sale.

Statistics from aBi Trust indicate that the coffee sector employs a total of 1.2 million farmers and this has reduced house hold poverty among those families. Gender issues are improving while farmers are incorporating climate-smart agricultural tactics through Green Growth initiatives introduced to them.

When it comes to yields by tree, there is a general increases in average yield the two types of coffee; for Arabica coffee, farmers now harvest at least 1.5 – 3 kilograms of the red cherries per tree, and for Robusta coffee, a farmer is capable of harvesting at least 1.5 to 8 kilograms per tree of red cherries.

Average acreage of participating farmers has also increased from 0.5 to at least 2 acres. Average

outcome has also improved from 45% to 58 % (Kiboko to FAQ) and exportable grades have improved from 78% to at least 85%, of which the target for Robusta coffee is 95 %.

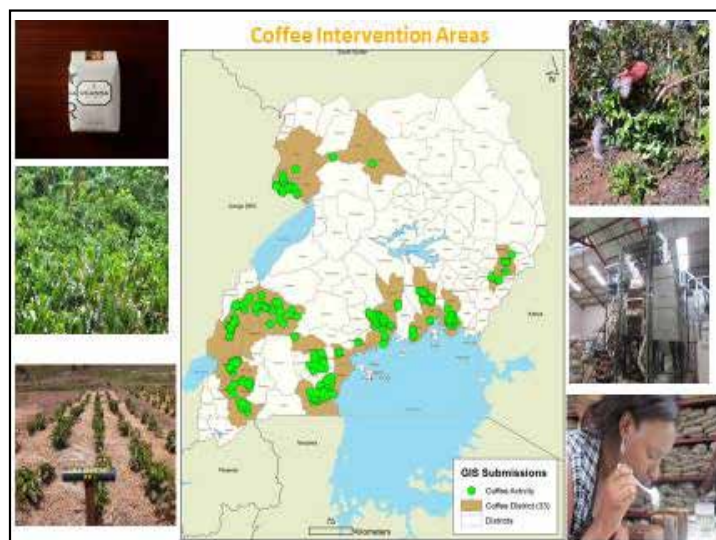
aBi Trust has further supported the provision of clean planting materials, over 40 coffee nurseries have been supported and licensed to produce and sell clean planting materials, established mother gardens and one tissue culture laboratory with the capacity of 2 million seedlings per annum.

Farmers have also been trained over the years on how to handle coffee to ensure quality. In addition 12 central washing stations have established, plus 6 motorized pulper to help in wet coffee processing, supported secondary grading facilities, and 3 primary processing facilities among others.

Despite the progress made in coffee sector so far, there is still a challenge of low uptake of production and quality enhancement technologies, price volatility, which makes marketing hard, adverse effects of climate change, low skills uptake among farmers, unstable exchange rate which leads to high cost of farm inputs among others.

The other challenge is inadequate extension staff to promote Good Agricultural Practices(GAP) and address quality issues, coupled with pests and diseases like the twig borer and coffee wilt disease to mention but a few.

By Josephine Omonyidde



Hanns R. Neumann Stiftung in 2015

The Hanns R. Neumann Stiftung (HRNS) implemented a number of projects in 2015 focusing on the expansion of the Uganda Coffee Farmers Alliance, Gender Mainstreaming, Youth development and Global Climate Change Adaptation.

For **gender mainstreaming** a participatory household approach was used, which supported families to reconsider their household dynamics. Through organizing couple seminars, women and men were motivated to reflect on their daily workload and income situation. Couples who were committed to changing the situation in their households were then registered as *change agents* and encouraged to extend their experiences to other households by becoming role models within their communities. Specific coaching for women in aspects of active participation, decision making and training of farmer group leaders to create awareness on gender equality are other key elements of the approach.

The impact of the gender household approach has led to more balanced sharing of roles and responsibilities within households. Families have also reported that they now tend to plan jointly on issues regarding farm and financial management. Last but not least, smallholder farming families are able to significantly increase their productivity, quality of output and income due to enhanced agronomic skills.

In the districts of Luwero, Nakaseke and Nakasongola HRNS focus on **Climate Change Adaptation Practices**. Through this project, farmer organizations have developed their own *Climate Change Adaptation Action Plans*, which have highlighted specific training-needs for farmer-members of these organizations. These training needs were used in the development of the training curriculum and the training guide by HRNS.

Over 1200 training sessions have been held on Climate Change Adaptation, with an average of 10 participants in each session. The major training topics included: rainwater harvesting and storage, soil water conservation using trenches, shade tree management in coffee, good coffee agronomic practices, integrated pest management, mulching, compost making, and drip irrigation (bottle irrigation).



Figure 1. Water harvesting tank

Eight shade tree and coffee nurseries have been established to provide certified planting material. 40 rain water harvesting and storage structures have been constructed in the different project areas which are being used to demonstrate the importance of storing and application of rainwater during the dry season.

Through the **Youth Development Project** in Mityana, HRNS has been able to promote youth participation in administration & operations of Farmer Organizations, and 88 youth farmers were facilitated to attend a Vocational Institute, and all obtained a certificate. Importantly in the Youth project is the promotion of Gender Equality in youth household through gender mainstreaming

activities, and discussions on general health topics such as HIV and AIDS. Youth-parent meetings are conducted to enhance understanding between youth and the community and to raise awareness on the importance of enhancing youths' involvement in agricultural activities.

In the expansion of the [Uganda Coffee Farmers Alliance Project](#) in Kasese, Masaka and Kalungu Districts, an additional 34 Depot Committees were established and more than 16,000 households have been registered as members of these Depot Committees. Currently the Uganda Coffee Farmers Alliance consists of 82 Depot Committees and 1668 Producer Organizations.

Setting up *Village Saving and Loans Associations* were emphasized amongst producer groups and this led to establishment of more than 60 VSLA groups. An additional 8 Coffee nurseries (4 in Masaka and 4 in Kasese), were established and have produced 843,600 coffee seedlings in 2015.

In Kasese, HRNS also introduced wet pulping machines to the Depot Committees in order to increase the value of the Arabica coffee through wet processing. The Depot Committees have been able to sell 17 MT of wet processed coffee so far, with an additional value of 2000 UGX per kilo compared to dry processed Arabica coffee.

HRNS Achievements in 2015	
Number of training sessions conducted	
On gender	253
On Climate Change	1,949
On good agronomic practices	5,626
On Organizational Development	410
As youth-parent meetings	69
Number of training contacts reached	101,738
Percentage of Change Agents adopting Joint Planning and Sharing of Tasks	83.11%
Total volume of FAQ bulked through Depot Committees	
In Kasese	316,127
In Masaka	234,842
In Luwero	237,147.5



Figure 2: The LC V Chairman Kasese District, Lieutenant Colonel Dula Mawa Muhindo Officiating at the handover ceremony of 10 pulping units to the DCs of Kasese Coffee Farmers Alliance.

Unleashing the potential of women in the coffee value chain

2015 commences: For the International Women's Coffee Alliance (IWCA) Uganda, the year 2015 kicked off well with the 9-women attending the African Fine Coffees Association conference and business-to-business (B2B) meetings that took place in February 2015. IWCA members gained business skills and linkages to market for their coffee through meetings with potential buyers. This has empowered women to continue with the coffee business since they now have direct contact with the buyer.



IWCA stars at the Bogota Convention

IWCA convention: took place in October 2015,

with 2-participants from Uganda attending this bi-annual convention in Bogota. The conference brought together members from Chapters all over the world. The Uganda chapter participated in the first ever female stars championships held during the convention and made a presentation on women in coffee Uganda.

Strategic plan: They say for every success there has to be a plan. IWCA-Uganda's strategic plan is in its final stages after much stakeholder engagement and consultant support in drafting the plan. The IWCA Strategic Plan will ultimately guide the organization on a clear focus for the future.

IWCA Board: IWCA operated with an interim board who have done a lot of work in shaping the organization this year. A big vote of thanks goes to those members for their selfless services. A new IWCA board has now been appointed to guide and direct the strategic direction of the organization. The board members were elected during an Annual General meeting that was attended by 70 participants, comprising of members from different districts from across the country and other key stakeholders such as the Uganda Coffee Development Authority (UCDA), Uganda Coffee Federation (UCF), African Coffee Association (ACA), Café Africa Uganda, and the International Trade Centre (ITC).

Barista training and entrepreneurial skill: IWCA Uganda nominated two barista members to participate in a 4-day training held in Nairobi in December 2015, enhancing skills development and promoting the participation of women throughout the coffee value chain.

Events and exhibitions in Uganda: IWCA members attended coffee shows in Luwero, Iganga, and Sironko, as well as the Uganda Coffee Day, and the Agri-preneur Summit organized by the American Chamber of Commerce with support from the US Embassy, Womens Day celebrations in Kabale, and the National Coffee Festival in Kampala. Participation and presentation at these events continues to increase awareness of IWCA programs and encourage families to engage in income generation initiatives. IWCA exhibits women crafts and shares information and knowledge of its initiatives, and learns of potential linkages and synergies to improve the value of IWCA influence in the sector.

Gender mapping: Together with Café Africa Uganda, in collaboration with UCDA and with funding

from the ITC, IWCA has carried out a gender mapping survey in the Eastern districts of Iganga, Kamuli, Mbale, Bududa and Kapchorwa and with coffee stakeholders in Kampala. This was done through focus groups with extension staff, UCDA Regional Coffee Extension Officers, District Production Officers, Community Development Officers, Community Gender Officers, farmer groups and co-operatives and representatives from private companies. A final report will be shared with the sector early 2016.

Reasons for Joint efforts in Advocating for Women in the coffee Value Chain

Women start small businesses faster than men according to Forbes Magazine, from home-based micro-businesses to small start-ups and shops, women will create over half of the 9.72 million new small-business jobs by 2018. Not only are women creating more jobs, the National Federation for Independent Businesses says women-owned small businesses, are able to weather economic recessions more effectively, and show more adaptability than male-owned small businesses. Want to have more coffee and more stability in the coffee industry? Then let's join hands and support women in the coffee value chain!



Women during the AFCA Conference

Half the world's population is women: Literally half of the seven billion people on the planet are female. Think how our exports would increase if these women were engaged in the coffee industry!

Save our country's economy! Empowerment of women spurs economic growth (foreign exchange through coffee), which can contribute to poverty reduction, improved stability and increased credibility in the global market.

We'll see more increased quality in coffee the vast majority (70%) of agricultural workers in Uganda are female. Advocating for women to grow, buy, and sell leads to better standards of living.

Better lives for men! If women are empowered, that frees men from the pressure to be the primary wage-earner, gives them more freedom to spend time with their children, take on other more interesting activities. More empowered women in the home demonstrates to our children, male and female, how they can work together and explore all aspects of who they are, without being constrained by traditional, limiting "masculine" or "feminine" roles. Society loosens up, and everyone is free to be who they truly want to be. Sounds pretty amazing.

Incredible ways to attract the youth into coffee investments

For several decades, it has been trendy to grow coffee as a traditional cash crop and is by far the main export earner contributing over 20% to the foreign exchange annually. However, young people are not actively participating in this business. Innovative approaches in the coffee sector are called for to attract the youth and keep them interested to focus their energies in boosting coffee productivity and value addition.

NUCAFE last year came up with an idea of a National Coffee Festival as an event to bring about entrepreneurial interactions of different players but at that same time with activities to pull the youth to enjoy this wonderful commodity in terms of not only drinking but crafting ideas to invest in coffee for increased job creation. The main aim of this event was to create increase exposure of the youth to opportunities, provide a networking platform for improved entrepreneurial skills and learning experiences from others to create jobs for themselves.

The event attracted over 1000 stakeholders including both youth going and non-going school youths, additionally the function attracted coffee experts from various companies (input dealers, banks, coffee shops, etc) and farmers among others, this gave the youth an opportunity to network and it was seen to bridge the gap between the elderly coffee farmers and the youth, it brought forth a number of organizations, cafes and financial institutions like: CURAD, aBi Trust, Ministry of Agriculture, Uganda Coffee Development Authority, Centenary Bank, Pride Microfinance, Café Pap, Omukago Cafe, and BrazAfric.

Once the youth are exposed to the various opportunities for them to make money, this will respond to challenges of their unemployment while boosting production, productivity and investments in the sector. This year's coffee festival annually will be held on Friday 4th November 2016.

Watch video at https://www.youtube.com/watch?v=9YXTCAPN_Eo

They exhibited products and disseminated information that educated the youth. This has contributed to boosting domestic coffee consumption because youth attendees are now buying coffee and the attitude towards drinking coffee is changing.

University students gathered at the event to pitch their business ideas under competitions, these especially were from universities like Uganda Christian University Mukono, Makerere University, and Kyambogo. Some of the business ideas collected include, coffee bags in the place of tea bags.

A fun festival, it was with lots of entertainment! The Minister of Agriculture said that the coffee festival should be held annually to celebrate the achievements the coffee sub sector as well attract the youth to invest in the coffee sector businesses.

Exposure and nurturing more profitable product innovations within the coffee value chain remains untapped and this is what the festival intends to address. There is an increased segment of the youth attaining higher education through access to university education, lack of entrepreneurial skills and exposure of the youth to opportunities makes it harder for them to create jobs and find meaningful jobs.



NUCAFE Team



Overview of the coffee year 2014/2015:

Uganda Coffee Federation perspective

We wish to congratulate the entire coffee fraternity upon successful completion of coffee year 2014/2015 in spite of the various challenges that were encountered. Below is the synopsis of the coffee market and outlook during 2014/2015.

Outlook

The global market currently looks down from the price point of view. Weakening economies and broadly weaker macro picture in the consuming world, and those that weigh in on the stock markets indicate the situation will prevail for some time.

The demand for coffee especially in the emerging markets like Korea, Japan, and China is stable although the strength of it largely depends on the performance of the global economy. The markets are quite challenging and Uganda's coffee sector has to prepare for the challenges.

Production

In as far as production is concerned, 2015/16 worldwide production is set for an estimated 152m bags up from 146m produced in 2014/15. Uganda's export performance is set to be around 3.5m bags 2014/15. Such a goal will need the farmers both the old and new to continue aspiring for good commercial farming methods. However, we must remain alert to the threat of El-Niño rains that weather experts have predicted in major coffee producing areas.

The El Nino Phenomenon

The year ended with the prevailing El Nino conditions negatively affecting the parts of Europe and North America but with no significant threat to the main coffee producing countries. However, the industry is still sentimental about the dry weather that may prevail over some coffee producing areas Columbia, Peru and Indonesia whose seasons start early in the year. In Brazil, El Nino conditions has lessened the threat of partial drought conditions for the main Brazil Arabica coffee districts for the first quarter of next year, which supports the early forecasts for a significantly larger new Brazil crop next year.

In Uganda, farmers expected to have a prolonged wet season and the seedling distribution was extended in some areas but now we are experiencing extremely high temperatures which puts the government coffee replanting programme at a disadvantage. While this is going on, coffee that was matured much later has had good bean formation and farmers are reaping better yields.

Coffee prices

Turning to the price, we witnessed a major fall in prices. Arabica prices were impacted more than Robusta as global demand focus shifted aggressively into the Robusta segment. Despite Robusta's perseverance for quite some time it reversed later and sharply traded lower. Overall price performance is very depressing. With Arabica prices down by 35-40% and Robusta also down by 15-20% since last year. However, currencies of the most coffee producing countries depreciated more than the fall in the international price. This indeed helped to bridge the gap that had been created by the fall.

The Uganda shilling has suffered from a significant devaluation against the U.S. dollar and in terms of local currency. There is also a rising inflation rate that is now in excess of 9% per annum, which means that farm gate income for the coffee farmers is decreasing and this could have a negative impact upon decisions made in farm investment by the farmers. We hope that there will be some improvement in international coffee prices in the short term which is a tremendous motivational factor to the farmers.

Competition

Amidst this price downward trend, the paradox of our industry can be seen through intense competition both locally and at a global stage. The number of competitors keeps growing, and despite the down trend of the international market, local price offerings have kept high a confirmation of free market efficiency around the world. For Uganda being a landlocked country there is serious need to fix obstacles, logistics and other impediments to be able to compete on the international market.

Consumption

Good news is that both global and local coffee consumption is increasing as people are now being sensitized of the importance of coffee consumption. International Coffee Organization (ICO) predicts an annual increment of approximately 2% in global consumption of coffee. It's assumed that domestic consumption is picking up as well and soon we will have substantial percentages domestically consumed.

We wish to commend all the efforts geared towards production / productivity and look forward to successful 2015/16.



EEA Contribution To The Coffee Sector During 2015

Feed the Future Enabling Environment for Agriculture Activity (EEA) is a five year activity that aims to improve the enabling environment for agricultural development, trade and adaptation to climate change within the coffee, maize, and beans value chains.

During 2015 year, EEA supported the coffee sector to develop key policy and regulatory instruments as well as strengthening the capacity of coffee institutions, particularly UCDA.

First, as the next step in the review of the coffee statute which began during 2014 with the preparation of the Background Research Paper, EEA contracted a law firm, KSMO Associates, to assist UCDA and the First Parliamentary Council (FPC) of MoJCA to draft the principles and the bill for the amendment of the UCDA Act (1994). KSMO prepared and presented drafts of the two documents to UCDA by end of March 2015. The UCDA Board reviewed and suggested improvements to the Principles of the Bill during their EEA-supported retreat in May 2015 and immediately after, the draft principles and the coffee amendment bill were finalized and submitted to TPM for review and clearance. However, industry stakeholders felt that the revision of the law should have been based on a repeal of the UCDA Act and enactment of a new sub-sector law instead of amendment of UCDA Act. Accordingly, through a series of meetings involving MAAIF Policy Analysis Unit, UCDA, and the First Parliamentary Council of MoJCA, it was agreed in September 2015 that the new legislation should be a sub-sector law. This will involve the repeal of the UCDA Act and replacement with a sub-sector law to strengthen the regulatory and development framework for coffee in Uganda. Following this understanding, EEA was requested to support redrafting of the principles and the draft bill which was concluded by the end December, 2015.

Second, following the approval of the National Coffee Strategy (NCS) on 29 June, 2015, UCDA requested EEA to support the launch and dissemination of the NCS to create awareness among stakeholders and trigger actions towards its implementation. Since October, 2015 preparations for printing, launch and dissemination have been underway but have been rescheduled to allow time for a better understanding of the implications of the process of scaling up the targets which was initiated by the Office of the Prime Minister's Delivery Unit. The rescheduling was also to harmonize the timing with the Annual Stakeholders Meeting (ASHM). The launch is now scheduled for 28th January, 2016 during ASHM.

Third, as an intervention towards implementing NCS, EEA supported the development of the National Coffee Research and Development Agenda. The process started in March 2015 with the contracting of two consultants (a national and an international). Through nationwide consultations that convened in Kampala, Mbale, and Masaka stakeholders views were gathered and informed the drafting of the Research Agenda. The final draft which was submitted to NaCORI and UCDA in August 2015 identified and elaborated research issues and themes along the entire coffee value chain as well as vital enabling environment and institutional factors essential for achieving the outputs, outcomes and objectives of the NCS. The next step is presentation and adoption of the agenda by UCDA management and board, NaCORI advisory committee, and NARO council to pave way for dissemination and implementation.

Finally, EEA supported UCDA to prepare for full implementation of NCS through developing the Corporate Plan, capacity building plan and the Board training.

USAID-Commodity and Production Marketing Activity

USAID is implementing the Feed the Future Uganda Commodity Production and Marketing Activity (hereinafter referred to as CPM or the Activity) through a five-year contract with Chemonics International, Inc. CPM is part of USAID/Uganda's Feed the Future (FTF) Value Chain Development Project that builds on more than 20 years of agricultural development experience and lessons learned by USAID/Uganda, Ugandan partners, and other donors. CPM exists to increase the productivity and income of Ugandan families by harnessing market forces and using innovative methods to increase the quantity and quality of coffee, maize, and beans that they are able to produce and sell.

CPM embraces the collaborating, learning, and adapting approach promoted by USAID/Uganda. Across the three value chains, CPM engages government institutions, private sector entities, and other FTF partners in planning, monitoring, mapping outcomes of innovations, and thereaf-

ter scaling up best practices and/or re-designing strategies and tactics within regions and value chains. In 2015 CPM expanded to all 34 FTF districts by engaging 156 middle value chain actor (e.g. traders, processors, and producer organizations) who invested resources and established relationships through their 1381 local agents that incentivized and built the capacity of farmers to improve productivity and market access across the target value chains.

Last year in the coffee value chain, CPM focused on good agricultural practices (GAP) with emphasis on integrated soil fertility management (ISFM) and integrated pest management (IPM), with particular attention to climate smart agriculture and crop insurance. The climate smart technologies promoted included utilization of shade trees, soil and water conservation techniques, coffee establishment techniques, soil-based macro nutrient fertilizers, and foliar fertilizers and mulching techniques. Through these interventions:

- Two hundred eighteen coffee learning sites of ½ acre each, were established in collaboration with middle actors, exposing over 8,000 new farmers to new technologies, intercropping coffee with beans, increasing yields and demand for inputs.
- A total of 501 coffee producers/processors and farmers attended the quality coffee awareness campaigns in Busoga region
- CPM supported Café Africa to conduct coffee shows in 11 Feed the Future Uganda districts while a total of 10,745 new farmers were exposed to extension services on good agricultural practices, quality inputs and market linkages among others
- Thirty-eight partners and their associated 355 Village Agents (VAs) were trained on the proper combination of soil based macro nutrient fertilizers and foliar fertilizers to reach out to 42,600 smallholder farmers.
- Cumulatively a total 61,345 coffee farmers have been exposed and benefits of adopting improved management practices including pruning and fertilizer application have started to manifest as farmers observe increased yield of 100%(from 2kg to 4kg/tree) and improved quality from pruned gardens.



Next year, CPM and Savannah Commodities are jointly investing in a fertilizer blending facility that will enable farmers to access high quality inputs through small packs of 1kg- 5kg, with the goal of increasing adoption of fertilizer use to increase yields. The initiative will be completed by work to promote soil testing.

To combat climate change effects, CPM in collaboration with Savannah Commodities and Toro Micro-Irrigation, a U.S.-based company, are piloting affordable drip irrigation systems that are appropriate for smallholder farmers, especially in areas prone to drought. The Activity will also work with insurance companies, the Ministry of Finance, Policy, and Economic Development, the Ministry of Agriculture, Animal Industry, and Fisheries, financial institutions, and other stakeholders to promote crop insurance for coffee, maize and beans. Adoption of crop insurance should reduce production risks, especially for the smallholder farmers. Support will also continue for the Uganda Quality Coffee Traders and Processors Association to conduct quality awareness campaigns in the major coffee growing regions.



UNADA IN COLLABORATION WITH MAAIF FIGHT FAKE AGRICULTURAL INPUTS IN THE COUNTRY



Agriculture Inspector Mr. Muzira Fred checking on one of the coffee chemicals (ACTRA) during Agro-dealer Inspection

Uganda National Agro-input Dealers Association (UNADA) is the apex organization for agro-input dealers in Uganda. UNADA's mission is to represent, network and empower member agro-dealers to operate sustainable profitable business of providing quality agro-vet inputs and services to farmers.

However, UNADA's efforts have been threatened by the high prevalence of fake inputs in the market estimated at 30-40% which has greatly eroded farmer's confidence and led to lack of faith in use of genuine purchased inputs. Fake inputs are found at all levels ranging from large scale importers to rural village retailers. Fake products range from adulterated agro-inputs to banned substances that may be harmful to crop, human health and environment. Unfortunately farmers and rural wholesalers and retailers have little or no means of verifying whether the products are genuine since they have no access to laboratory services.

The situation is exacerbated by limited availability of quality inputs (especially seeds) at critical times in the season which forces farmers to obtain ad-hoc supplies from disreputable sources thus creating opportunity for fraud. Likewise consumer demand is low for fertilizer or CPP quantities yet the supply is in large packs which creates a legitimate need to repackage the product. Once a consumer buys a scoop of fertilizer in a plastic bag or pesticide in a water bottle, there is no way to tell what the product is. Noncompliance of Agro-dealers to the laws governing the sector leaves room for counterfeiting. According to 2008 agro dealer census, less than 10% of agro dealers reported to have been registered by MAAIF.

UNADA in collaboration with Ministry of Agriculture Animal Industries and Fisheries (MAAIF) under the Uganda agricultural chemical control act, 2006 enacted to control storage, distribution and trade in agricultural chemicals carried out the following activities to control distribution of counterfeit agro-inputs;

- Over 1000 Agro input dealers have been trained in safe use and handling of agro-chemicals in collaboration with MAAIF and Makerere university Kampala
- UNADA has supported Agro-dealers with the registration process to enable them operate legally, register and license agro-inputs businesses to comply with the laws and regulations governing the sector.

- Over 400 Agro dealers and their premises have been inspected by MAAIF for compliance and safety with regard to agro dealer themselves. Approximately 200 inspected agro-dealers were forwarded to the Agriculture chemical Technical Committee (ACTC) and Agriculture Chemical Board (ACB) for approval.
- Sensitization of agro-dealers on genuine products during agriculture coffee shows and trainings is still on-going.

It is hoped that if Agro-dealers are supported and encouraged to register with MAAIF to enable the process of getting a license it will help them operate their business legally, reduce counterfeits, increase demand, improved yields and incomes among farmers.



Mityana coffee show on 26/08/2014 chief guest Mrs. Victoria Sekitoleko & Hon MP Mrs Sylvia Namabidde Inspecting UNADA stall.



2015 Annual Coffee Shows

An essential component in the Uganda Coffee Production Campaign, Uganda's annual coffee shows create awareness, build knowledge and expertise and raise enthusiasm for increased quality coffee production in Uganda contributing to sustainable livelihoods for Uganda's smaller-holder farmers.

A typical coffee show ...

The Uganda Coffee Platform National Steering Committee (NSC) determines the annual theme of the shows under an overall agenda of sustainability. NSC members contribute quality technical oversight on the design and content of the shows, mobilize resources at the central level and advocate nationally for key stakeholder engagement for the sector. The district level coordination and management of each show is done by a District Steering Committee (DSC) representative of local government, nursery operators, agro-input dealers, agro-processor/ traders, farmers, projects, youth, women and local media representation. On behalf of the NSC, Café Africa Uganda (CAU) coordinates the annual coffee show schedule and supports DSC in event planning and mobilization of resources.

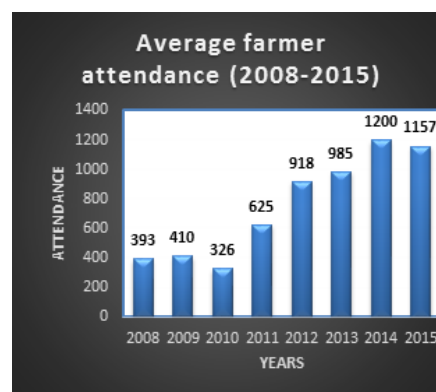
The coffee show schedule ... runs during the coffee season – June to November each year. Shows are split across 5-regions with approximately 6-shows per region, introducing new districts each year.

Each show is intended to:

- Mobilize farmers into increased coffee production
- Promote innovative strategies like extra activities done during off season and value addition
- Offer practical demonstration of best agricultural practices
- Shares lessons and experiences from different stakeholders
- Support district level public and private sector stakeholders to jointly organise events
- Promote the principles of coffee as a business and inspire interest in the sector to expand coffee production and the participation of women and youth in the coffee value chain
- Increase and Improve on the involvement of youth and women in the coffee sector and to better understand their input in the coffee sector

Attendance

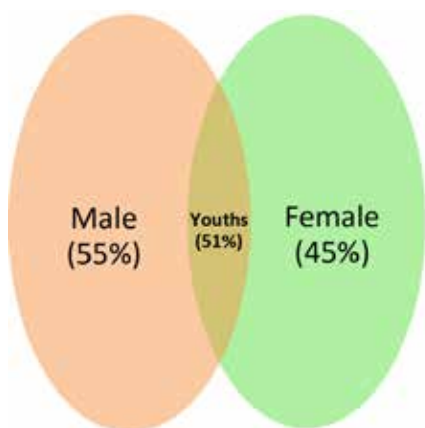
Since 2008, more than 128,966 people have attended the shows across the country. Typically a show brings together farmers, national and local government representatives, nursery operators, agro-input dealers, agro-processors, traders, non-governmental organisations/ projects, SACCOs and banks, and others interested in sharing ideas, successes and challenges in the coffee sector.



2015 shows

The highest number yet of district coffee shows took place in 2015 with 32 successfully held throughout the country.

Key sector stakeholders showed great support for the 2015 coffee shows with attendance by Ministers, Members of Parliament, cultural leaders, UCDA officials, district officials, the NSC membership and other groups and organisations. On the right, we see the Managing Director of the UCDA showing his support for the practical demonstrations and advice being given by recently trained district coffee extension workers at the Rubiziri show.



A total of 37,032 attended the 32 shows in 2015 with an average of 1,157 per show: male / 55%, female / 45%. The percentage of youth of that total attendance is 51%.

Physical demonstrations and expert advice are made available at each show by recently trained coffee specific extension workers. The show offers an opportunity for the farmer to be taken on a journey from the planting of the coffee seedling to the coffee in a cup. Coffee specific agronomists and extension workers are available at each show to provide physical demonstration of good agricultural practices throughout the coffee growing cycle, from selection of plant materials, hole preparation, management of soil fertility, planting, pruning and de-suckering, stumping, and mulching. **Climate change adaptability** options are demonstrated such as soil and water conservation on the coffee farm, and the community are encouraged to share local innovations such as energy conserving stoves.

Up to date research information is provided by the National Coffee Research Institute amongst other partners, on pest and disease control and treatment, giving farmers specific knowledge of regionally occurring pests and diseases.

Drama and music activities focus on women and youth to inspire interest in the coffee sector and communicate key messages on good agricultural practice, family or group management of coffee farmers and opportunities for other activities in the coffee value chain.



Competitions encourage women and youth to actively take part in the coffee shows, share their experiences and work together on new innovations. On the right the photo depicts a young man grinding coffee at the Kamuli show using the traditional grinding stone. Looking on are members of the women's group who devised this idea and went on to sell the ground coffee as a refreshment during the show.

Youth participation rose in 2015 to 51%, in part due to the introduction of football competitions which have proved to be extremely successful. Football is a well-known tool to unite communities, break down traditional barriers, and promote social inclusion. These activities have not only inspired more youth participation in coffee shows, but have increased community participation more generally



.Youth football team in Mayuge ready for the battle

Coffee show prizes sponsored by various donors are given at the end of each show for the best innovations and winners of the youth football competition. Prizes include coffee grinders, and football uniforms and trophies. A raffle draw offers even more prizes such as knapsack sprayers, tarpaulins, pruning saws, and secateurs.



Hon Sempijja giving out raffle prizes to successful

farmers at Kalungu



Advice on identification, proper use of and sale of genuine agro-inputs ensures farmers have access to the right information on appropriate use of inputs.

Success story

In Kamwenge, the show started as early as 9am. On arrival of the Café Africa team and other invited guests we were led by the DSC to visit farmers who have had successes as a result of learning and ideas they were exposed to at previous shows both in Kyenjojo and Kamwenge.

Kabango Coffee Nursery demonstrated one young man's successful investment decision which was based on his engagement at a 2013 coffee show where he was informed about the huge demand for quality coffee seedlings. The nursery now has one million coffee seedlings, with projections of four million by end of 2016.



A cross section of Kabango Coffee Nursery, Kamwenge, with some of the invited guests from the coffee show.







Thank you!

The Uganda Coffee Platform National Steering Committee would like to thank Uganda's coffee stakeholders for their continued commitment and support to the development of Uganda's coffee industry. We look forward to a prosperous and vibrant coffee sector in 2016, and beyond!



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