



Republic of Uganda

**MINISTRY OF AGRICULTURE,  
ANIMAL INDUSTRY AND FISHERIES**

**THE NATIONAL COFFEE POLICY**

August, 2013



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# FOREWORD

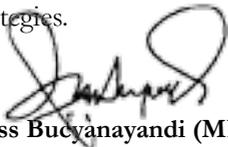
Coffee is currently the most widely traded tropic agricultural commodity in international trade. It is a strategic commodity for Uganda as a major foreign exchange earner as well as providing income for over 1.5 million households. Given the social and economic importance of coffee in Uganda, it requires a policy direction to enable it continue to play this role.

The Coffee subsector has, over the decades, been guided by various policy documents of the National Development Agenda, which required harmonization and consolidation as well as taking into account new emerging developments.

A comprehensive National Coffee Policy that defines clear-cut interventions required for scaling up performance and development is vital. The formulation process of this policy was highly consultative involving all key stakeholders in Government, coffee industry and non-government institutions and cross sections of society. The policy will, therefore, be a solid foundation for review of supportive legal and regulatory frameworks that will create an enabling environment for guiding the coffee sub-sector.

This policy aligns the major thrust areas of the sub-sector with the vision 2040 that aspires to transform Uganda's agriculture sector and make it more productive, profitable and competitive. The policy will address the critical areas aimed at increased production and productivity; improving coffee research; extension; supporting and strengthening farmer organizations; streamlining and strengthening coffee laws and regulations; promotion of value addition processes; and development of the domestic coffee market.

The Ministry of Agriculture, Animal Industry and Fisheries will undertake to support institutional and functional frameworks that will embrace all the actors in the coffee sub-sector for successful realization of the policy objectives and strategies.



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MINISTER OF AGRICULTURE, ANIMAL INDUSTRY AND FISHERIES

# 1.0 Introduction

Coffee remains the most important commercial agricultural commodity and the major foreign exchange earner and has been contributing an annual average of 20% of Uganda's total export revenue for the last ten years. Despite the importance of coffee in Uganda, the country has never had a comprehensive coffee policy. Government policy on the coffee sub-sector is scattered in various documents and implemented by different institutions thus making it difficult to have an effective strategy to achieve the desired growth so that Uganda regains its former position as the largest coffee producer on the African continent.

The National Coffee Statute 1991 and Coffee Regulations, 1994 cover only the off farm stages of marketing and processing, leaving the on-farm processes unregulated. The Statute and Regulations also leave out coffee research. Currently, the policy guidelines are derived from the Coffee Statute, and operationalised through the annual budget process under the Ministry of Agriculture Animal Industry and Fisheries (MAAIF). This approach does not provide a clear focus for the development of the coffee sub-sector hence the need to formulate a comprehensive and articulate policy that can guide the sub-sector so that it contributes effectively to economic growth of the country.

Lack of a comprehensive National Coffee Policy (NCP) has contributed to Uganda moving from the number one position in Africa in 1960s and 1970s, to the second position after Ethiopia in coffee production, and occupies the 10th position (2008) as world coffee exporter. Sub-sector performance has stagnated at around 3 million 60-kg bags in the last four decades, while export earnings fluctuated based on export volumes and price of coffee on the world market. Given its dominant position in export earnings and employment, coffee needs a policy to guide public and private activities in the development of the sub sector. In particular, the policy shall focus on developing the entire coffee value chain with special emphasis on farmer empowerment.

The formulation of the NCP recognises and is aligned with the functions of the Ministry of Agriculture Animal and Industry Fisheries (MAAIF), its

Development Strategy and Investment Plan (DSIP), the National Agricultural Policy and the National Development Plan. This policy is consistent with international Coffee Agreement 2007 and has benefited from wide national coffee stakeholder consultations.

## **2.0 Situation Analysis**

### **2.1 Policy Context**

The overall development framework of the Government of Uganda is contained in the National Development Plan (NDP), 2010/11 – 2014/15. The NDP recognizes agriculture as one of the key pillars for economic growth. In order to operationalise the NDP objectives on agriculture, Government formulated the Development Strategy and Investment Plan (DSIP) in MAAIF which has prioritized coffee as the second ranked enterprise among the 17 strategic commodities.

### **2.2 Performance of the sub sector**

#### **2.2.1 Coffee production and productivity**

In Uganda, coffee production has stagnated at 3 million bags per year over the last 40 years. Smallholder farmers dominate coffee production with average holdings estimated at 0.33ha per household. There is limited estate production. Input use is low, resulting into low yields, estimated at an average of 369kg/ha against experimental yield of 3,500/ha giving a yield gap of 3,130kg/ha (850% of present farmer yield). This is attributed to inadequate funding for research to enable the development and dissemination of new technologies, poor agronomic practices (low input-low output farming system), inefficient research-extension-farmer linkages, incidence of Coffee Wilt Disease (CWD) on Robusta, which destroyed over 50% of the old Robusta trees among other causes.

## **2.2.2 Coffee Farmers**

Based on the Uganda Census of Agriculture 2008/09, coffee in Uganda is predominately produced by 1.32 million households. The smallholder coffee production system in Uganda is characterized by low acreage, low yields, limited participation in the post farm processes, lack of improved technologies, unreliable sources of quality inputs, unsustainable agronomic practices, inadequate extension and business advisory services, poor organisation of farmers, low participation of the youth and dominance by aged farmers.

## **2.2.3 Inputs Use**

There is generally low use and limited access to agricultural inputs by smallholder coffee farmers. This is attributed to high cost of agro inputs, weak distribution network and limited farmer knowledge of input use. In most instances farmers have continued to apply low quality inputs and uncertified planting materials. In some cases, farmers purchase counterfeit inputs. This situation is compounded by a weak input regulatory and enforcement system.

## **2.2.4 Extension and Business Development Services**

At farm level, extension services are inadequate and focus mainly on agronomic practices without business development services (BDS). Lack of regulation for on-farm processes has led to quality deterioration through harvesting unripe cherries and drying coffee on bare ground which affects the cup quality. Off-farm processes are better regulated through the licensing of processors and big traders under the auspices of Uganda Coffee Development Authority (UCDA). UCDA also carries out mandatory quality inspections for issuance of export certificates, but regulation at secondary stages of the value chain without regulation at primary stages can only guarantee a given grade but cannot correct quality attributes like unpleasant odours acquired during on-farm practices.

## **2.2.5 Coffee Research**

Coffee research in Uganda is carried out by the Coffee Research Centre (COREC), a programme under National Crops Resources Research Institute

(NaCRRI) of the National Agricultural Research Organization (NARO). Coffee research is heavily constrained by insufficient funding, inadequate infrastructure and facilities, and is greatly understaffed. In its current state, it cannot respond to industry research requirements of adequate production of improved seedlings, eminent threats of pests and disease like twig borer and leaf rust; and the future threats like climate change. These need to be addressed in order to improve the competitiveness of Uganda's coffee industry.

### **2.2.6 Value Addition**

In order to increase the revenue from Uganda coffee, it is important to add value at all stages of the coffee value chain. Currently, most value addition activities take place at post harvest level. Off-farm value addition involves adding value through processing to green (FAQ) coffee beans, export grading and roasting. Value addition is almost a preserve of private individuals and firms with minimal participation of farmers. Farmers' sales continue to be dominated by red cherries, kiboko (sun dried cherries) or patchment, mostly through middlemen who sell to exporters. Farmers who sell unprocessed coffee earn less income than they would if they sold processed coffee.

The Government of Uganda is encouraging value addition, especially at primary level to enable farmers add value and get more money, but this is not yet achieved in the coffee sub sector because farmers are faced with two challenges. First, there has not been sufficient support to farmers to enable them add value to their coffee since liberalisation of the coffee industry in 1991. At the time of liberalisation most of the farmer cooperative unions had internal management problems after political interference that characterised cooperatives in the 1970s and early 1980s. Second, liberalisation brought in more experienced international firms, with better business skills, capital outlays and with mother firms' support and linkages throughout the world. Cooperatives could not compete with such firms without further skills development, even if they had been capitalised.

## 2.2.7 Marketing

Coffee marketing in Uganda is fully liberalised. It is characterised by small scale traders (aggregators), farmer groups, middlemen (processors & merchants), small and large coffee exporters. There is very high competition in coffee trade at all levels which has increased prices paid to farmers as buyers compete for reduced volumes of coffee available. The challenge arising out of this is the deterioration in quality at primary levels and the increase of malpractices. The buyers and processors focus more at quantities that will enable them to financially break even, putting quality issues in a secondary position. The pricing mechanism at farm level often lacks quality differentiation for better prices making farmers less concerned about quality. Currently there is no regulation stopping farmers from harvesting and selling unripe coffee. There is also no law prohibiting drying coffee on the bare ground or selling coffee with high moisture content. This situation is not sustainable in the long-run because of loss of value to the nation and to farmers.

Along the coffee value chain, primary processing is the easiest entry point for farmers to functionally upgrade, add value and earn higher incomes from their coffee. Functional upgrading is difficult in the current market structure because most smallholder farmers are not well organised into viable groups for collective marketing, lack capital and business management skills to compete with the other players in the coffee value chain, most of whom have better marketing knowledge, finances and networks. The farmers' position is exacerbated by the collapse of the cooperative movement and since liberalisation there has been insufficient public sector intervention to support farmers for functional upgrading for better incomes.

The Coffee Regulation of 1994 prescribed coffee standards and grades. The current market environment and consumer preferences have been changing. There is need to accommodate the new market requirements and preferences. This should be done through new grades, branding and promotion of speciality (sustainable) coffees for niche markets.

## **2.2.8 Consumption**

In Uganda there is still limited domestic coffee consumption, less than 1% of coffee produced is consumed locally. There is limited public sector support to promote domestic coffee roasting industry and consumption. However, there is growing consumption in urban centers as evidenced by proliferation of coffee shops and roasteries. Currently there is no specific coffee law regulating the processing and trading of roast and ground coffee.

## **2.3 Institutional Setup**

### **2.3.1 Public Institutions**

In the public domain, the services to the coffee sub-sector are segmented among UCDA for regulation, NAADS for extension services and NARO for research. All the three institutions are under the Ministry of Agriculture, Animal Industry and Fisheries (MAAIF). However, the existing legal frameworks that established the three institutions do not define and differentiate linkages and roles among them. This has resulted in inefficient implementation of coffee sub-sector activities especially with regard to research and extension. For example the UCDA Statute 1991, gives it unclear responsibilities for research, while the National Agricultural Research Act 2005 specifies that all agricultural research is the responsibility of NARO. Likewise, NAADS role in coffee extension is not clear beyond the input support they provide to some farmers.

### **2.3.2 Private sector institutions**

The private sector is composed of farmer's organizations, traders' and roasters' associations. There are also a limited number of cooperatives involved in buying and exporting coffee.

Currently, Ugandan farmers mostly operate on individual basis, a situation that limits coffee aggregation for collective processing and marketing. Farmers have limited participation in research and can hardly influence policy. They lack a farmer-owned structure that links grass root farmer organizations to tertiary ones to empower them to participate in research, influence policy, grow, process

and market their coffee. Farmers need to own their coffee not only by growing but also by participating in all other stages of the value chain, influencing all decision making processes affecting the coffee industry and functionally upgrading to earn more money.

The traders' and roasters' associations also lack collective membership, there are several associations and while some are fairly strong, others are weak and in their current state seem to serve limited purpose.

There is need to build capacity for all private associations so that they are able to respond to the needs of their members and the coffee sub-sector. Fortunately, the coffee industry has established a National Coffee Platform that brings together all coffee stakeholders and it needs to be supported to grow.

## **2.4 Emerging issues**

This policy is aimed at addressing existing and emerging issues in the coffee industry. The main emerging issues include the following:

- Climate change has implication on changing production patterns and increased incidence of pests and diseases.
- Increased population growth, urbanization and industrialization are putting pressure on land available for coffee production.
- Coffee production is in the hands of the aging farmers while the youth are more attracted to off-farm activities.
- There is growing demand for conventional and certified coffees in emerging and traditional markets, respectively. The coffee industry in Uganda needs to be responsive to them.
- The discovery of oil which could draw away Governments attention from Agriculture in general and coffee in particular.

## **3.0 Guiding Principles**

This national coffee policy shall be guided by six principles. These principles are derived from experiences and practices in the coffee industry.

- i. Coffee production, processing and marketing in Uganda shall continue to be undertaken by the private sector, as individual farmers, farmer organizations and companies.
- ii. The coffee subsector shall operate under a liberalized market environment that allows free entry and exit at all stages of the coffee value chain within the framework of a regulatory body.
- iii. Coffee development services shall be provided to all farmer categories as individuals and groups ensuring gender equity, with special emphasis on women and youth.
- iv. Farmers shall be empowered to participate at all stages of the coffee value chain through their organizations.
- v. Service delivery in the coffee industry shall be guided by the needs of stakeholders at all stages of the value chain.
- vi. Value addition shall be pursued at all levels of the value chain for the benefit of all stakeholders.

## **4.0 Policy Objectives and Strategies**

The goal of this National Coffee Policy is to guide and regulate activities of various stakeholders in the coffee industry so as to improve production, processing, marketing and roasting of coffee.

### **4.1 Vision**

The vision of the coffee industry in Uganda is *“having a competitive, equitable, commercialised and sustainable coffee sub sector.”*

### **4.2 Mission**

The mission of the coffee industry is *“to increase coffee production, value addition and domestic coffee consumption”.*

### 4.3 Policy Objectives and Strategies

*Objective 1: To increase coffee production and productivity at farm level in a sustainable way that addresses the social, ecological and economic dimensions.*

Strategies:

- Promote and support adoption of good agronomic practices (proper spacing, pruning, mulching, etc) at farm level.
- Promote coffee growing in new areas and expansion in traditional coffee growing districts.
- Promote use of high yielding, disease resistant and drought tolerant varieties
- Improve the management of diseases and pests.
- Improve access and use of agro inputs in the coffee subsector.
- Mainstream participation of women and youth in the entire coffee value chain.
- Promote the environmental and biodiversity conservation practices in the coffee production systems.
- Promote and support coffee farming as a business among smallholder farmers and farmer organizations.
- Promote and support medium and large scale coffee farming.

*Objective 2: To strengthen the coffee research system so that it is responsive to industry requirements and demands.*

Strategies:

- Support the establishment of a Coffee Research Institute within NARO, in line with the NARS Act that is responsive to the coffee industry needs and accountable to all the coffee stakeholders.
- Support the establishment of a Coffee Research Trust Fund to ensure sustainable financing for coffee research.
- Strengthen the linkages among coffee research, development and extension.

*Objective 3: To support coffee specific extension within the unified / centralized delivery systems that meets the prevailing industry requirements.*

Strategies:

- Provide support for coffee specific extension in every coffee producing district.
- Train extension service providers in coffee specific extension knowledge including business development services.
- Build capacity and support farmer-led extension systems.
- Incorporate coffee extension training in the curriculum of agricultural tertiary institutions.

*Objective 4: To support and strengthen coffee farmer organizations to participate effectively in all the stages of the coffee value chain*

Strategies:

- Mobilize and sensitize farmers to form farmer organizations *leading to formation of an Apex body* that operate as business units.
- Promote value addition technologies among farmer organizations by supporting them to participate at higher levels of the coffee value chain.

*Objective 5: To streamline and strengthen existing coffee laws and regulations at all stages of the coffee value chain to ensure adherence to the recommended quality standards*

Strategies:

- Approve this National Coffee Policy.
- Amend the Coffee Statute 1991 in line with the provisions of this policy.
- Review and revise coffee regulations 1994 in line with the provisions of this policy.

*Objective 6: To promote value addition processes at all stages of the coffee value chain to respond effectively to both national and international market requirements and opportunities.*

Strategies:

- Promote primary processing (wet and dry coffee processing) practices at farm level.
- Promote and support bulk marketing and export grading among farmer organizations.
- Promote and support coffee certification schemes for specialty coffee markets.
- Promote export of value added coffee products.
- Support the establishment of a soluble coffee factory

*Objective 7: To promote domestic consumption of coffee as a way of enhancing coffee industry competitiveness and developing the domestic coffee market*

Strategies:

- Use existing coffee and health resources to disseminate the benefit of coffee drinking to health professionals and consumers.
- Develop local coffee roasting capacity and train roasters and baristas.
- Develop and institute standards and regulations for the internal marketing of coffee as a final product.
- Mount a campaign aimed at promoting domestic coffee consumption.

## **5.0 Policy Actions**

In order to achieve the objectives and strategies of this policy, the following actions shall apply:

- Government shall support mass multiplication and distribution of improved coffee planting materials.
- Government shall enact new laws and regulations, and review the existing ones in the following areas – planting materials, nurseries, growing, harvest and post-harvest handling, marketing, roasting and certification.

- Government shall establish a National Coffee Research Institute (NaCORI) *within NARO, in line with the NARS Act* whose governance shall reflect all stakeholders.
- Government shall establish a Coffee Research Trust Fund to provide adequate and sustainable funding for coffee research across the entire coffee value chain.
- Government shall ensure a coffee specific extension service within the central/unified extension delivery system in all coffee growing districts.
- Government shall support the development of coffee farmer organizations to participate effectively in all stages of the coffee value chain.

## **6.0 Institutional Framework and Policy Implementation**

### **6.1 Revision of the Coffee Statute and Regulations**

The first requirement is for the existing Coffee Statute 1991, to be revised or replaced, so as to meet the objectives of this policy. Specifically, it shall encompass the governing of coffee nurseries, growing, harvesting, drying, processing, marketing, roasting, certification and verification. The law shall segregate the roles of the institutions responsible for coffee (a coffee research institute, extension and training services, and a regulation and development agency) and should also recognise private sector stakeholders like farmers, traders, processors and roasters organisations. The Coffee Statute shall also harmonise the legal and institutional frameworks of the public agencies involved in the coffee sub sector.

Wherever possible and practicable, agencies will remain responsible for the same functions within the coffee sub-sector. For example, NAADS will remain responsible for extension services, but must form a coffee specific extension and training programme, in collaboration with the farmers' organisations, private sector and UCDA. Likewise, NARO will remain responsible for coffee research, but will delegate the function to the proposed National Coffee Research Institute with industry-led governance.

## **6.2 Setting National Coffee Standards**

Uganda National Coffee Standards will be reviewed, and developed where needed, to apply to all stages of the coffee value chain. The standards shall be in harmony with the proposed coffee law and International Standards where appropriate. Enforcement of the standards will be the responsibility of government, with strong support from stakeholders, private and public. The coffee standards shall include food safety clauses to ensure Ugandan coffee meets food safety requirements in consumer countries.

## **6.3 Intra-institutional co-ordination**

There is a need for an institutional framework to address co-ordination of various organisations involved in the coffee sub-sector, i.e. Local Government (LG), NAADS, and NARO etc. This inter institutional co-ordination shall be a function of UCDA.

The Ministry responsible for Agriculture shall maintain a supervisory role on Local Governments to ensure that coffee growing is undertaken as per policy guidelines.

## **6.4 Establishment of a Coffee Research Trust Fund(CRTF)**

Government shall establish a coffee research trust to ensure sustainable funding to the coffee research.

The sources of funds into the CRTF shall be the coffee cess (*a possibility of increasing it from the current maximum of 1% to a level of 2 or 3% shall be explored*), government appropriation, and contributions from the private sector and development partners. This fund shall be managed in line with Government financial management systems.

## **6.5 Infrastructure and Support Services**

The NCP is not a stand-alone policy. It will depend on other sector/sub sector policies and their implementation. These include, transport, energy, water for production and agricultural finance.

### **6.5.1 Roads**

The road network in most coffee growing areas is inaccessible during most of the year. The central and local governments shall ensure that roads are maintained to facilitate movement of extension and training staff, inputs and coffee.

### **6.5.2 Energy**

Energy is needed in coffee processing to enable farmers add value. The government's Rural Electrification programme has increased coverage of hydroelectricity, but the costs remains high. Government will continue to increase coverage especially where farmers will wish to install coffee hullers and wet coffee processing mills.

### **6.5.3 Water for production**

Irrigation in Uganda remains constrained by the cost of irrigation infrastructure. The policy provides for the promotion of irrigation where water catchment areas are near to farmers and affordable in cost terms. Government will particularly promote gravity schemes as a cheap source of irrigation.

## **6.6 Institutional Roles and Responsibilities**

This matrix outlines the generic roles and responsibilities for institutions at all levels in the implementation of the National Coffee Policy.

<b>Institution</b>	<b>Roles and responsibilities</b>
Ministry of Agriculture Animal Industry and Fisheries (MAAIF)	<ul style="list-style-type: none"> <li>• Approval of the National Coffee Policy</li> <li>• Amendment of the Coffee Statute 1991 and revision of Coffee Regulations 1994</li> <li>• Establish a Semi-Autonomous National Coffee Research Institute (NaCORI) under NARO</li> <li>• Establish a Coffee Research Trust Fund</li> <li>• Provide for coffee specific extension services within the centralised/unified extension delivery system</li> <li>• Enforce regulations on agro inputs</li> <li>• Establish and enforce standards for coffee at various stages of the value chain</li> <li>• Supervise Local Governments (LGs) in service provision and enforcement of standards</li> </ul>
Local Governments (LGs)	<ul style="list-style-type: none"> <li>• Augment coffee extension services in collaboration with NAADS, UCDA and MAAIF</li> <li>• Enforce coffee standards at farm level in collaboration with MAAIF</li> </ul>
National Coffee Research Institute (NaCORI) within NARO, in line with the NARS Act	<ul style="list-style-type: none"> <li>• Undertake coffee research that meets industry demands</li> <li>• Establish adequate mother gardens of improved coffee varieties in different parts of the country</li> <li>• Provide technical support to the private sector in mass multiplication of improved coffee varieties in collaboration with UCDA</li> </ul>

<b>Institution</b>	<b>Roles and responsibilities</b>
Uganda Coffee Development Authority (UCDA)	<ul style="list-style-type: none"> <li>• Develop a strategy to operationalise the National Coffee Policy</li> <li>• Regulate industry activities along the entire coffee value chain</li> <li>• Verify and certify planting materials and multiplication centres in collaboration with NaCORI</li> <li>• Build capacity of industry participants on a demand driven basis through training and institutional development along the entire value chain</li> <li>• Collaborate with Coffee Research Institute and the private sector in the mass multiplication of planting materials</li> <li>• Monitoring and Evaluation</li> <li>• Annual reporting on coffee industry</li> <li>• Collect, analyse and disseminate coffee sub sector statistics</li> <li>• Represent Uganda on regional and international fora</li> <li>• Demand accountability from other MAAIF agencies</li> <li>• Undertake socio economic and policy research</li> </ul>
National Agricultural Advisory Services (NAADS)	<ul style="list-style-type: none"> <li>• Provide demand driven coffee extension services to farmers in collaboration with UCDA, NaCORI and the private sector</li> <li>• Promote adoption and transfer of new technologies in coffee production</li> <li>• Support farmers to form farmer organisations</li> </ul>

<b>Institution</b>	<b>Roles and responsibilities</b>
Processors’ Traders’ and Roasters’ Associations	<ul style="list-style-type: none"> <li>• Engage in policy dialogue and facilitating businesses</li> <li>• Compliment public service delivery such as provision of inputs</li> <li>• Represent stakeholder interests in various fora</li> <li>• Explore and promote Uganda’s coffee in traditional and new markets for Uganda coffee</li> <li>• Promote domestic coffee consumption</li> <li>• Develop coffee roasting and soluble manufacturing capacities</li> </ul>
Farmer Organisations	<ul style="list-style-type: none"> <li>• Mobilise and sensitise farmers to form viable groups that operate as business units</li> <li>• Promote the adoption of sustainable coffee production systems</li> <li>• Support and participate in value addition activities along the coffee value chain</li> <li>• Procure efficient extension services for coffee farmers</li> <li>• Represent and advocate for farmer interests in various coffee fora</li> <li>• Collaborate with research agencies in generation and development of appropriate technologies</li> </ul>
Development partners	<ul style="list-style-type: none"> <li>• Share knowledge, skills and best practices</li> <li>• Provide development financing to the coffee industry</li> <li>• Support the private sector in the coffee industry</li> </ul>

## **7.0 Monitoring and Evaluation**

The implementation of this policy is the responsibility of multiple stakeholders in the public and private sectors. Therefore, it will be important to regularly assess the progress made in the implementation of the roles and responsibilities of various stakeholders. As such, a monitoring and evaluation system shall be established under UCDA, but implemented in partnership with other stakeholders in the coffee industry. As part of developing the National Coffee Strategy, monitorable indicators shall be identified and agreed upon by all stakeholders. Monitoring the implementation of strategies under this policy shall be done on a continuous basis, and results presented to all stakeholders during an annual meeting. The results of the monitoring exercise shall inform subsequent activities of the various stakeholders in the coffee industry.



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