



DAIRY DEVELOPMENT AUTHORITY

STATISTICAL BRIEF (JULY - SEPTEMBER 2022)



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INTRODUCTION

The performance of the dairy sub sector improved during the quarter due to the rainy season in most parts of the country.

Seasonal Change!

The last month of the quarter i.e. September marked the beginning of a wet season that led to a significant fall in farm gate milk prices as compared to the previous month of August.

MILK PRICES

National Raw Milk prices

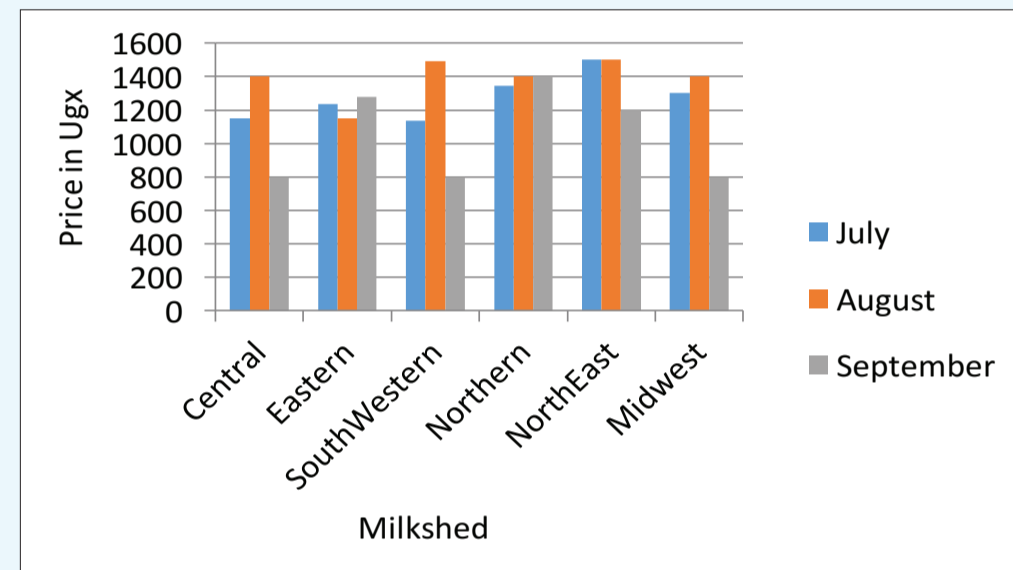


Figure 1: Regional Farm gate raw milk prices

Farm gate prices were highest in August and dropped significantly in September especially in the Southwestern region where the price dropped by shs 694! This was due to the increase in milk volumes during the wet season. Northeastern milk shed continues to have the highest farm gate prices overall.

Source: DDA 2022

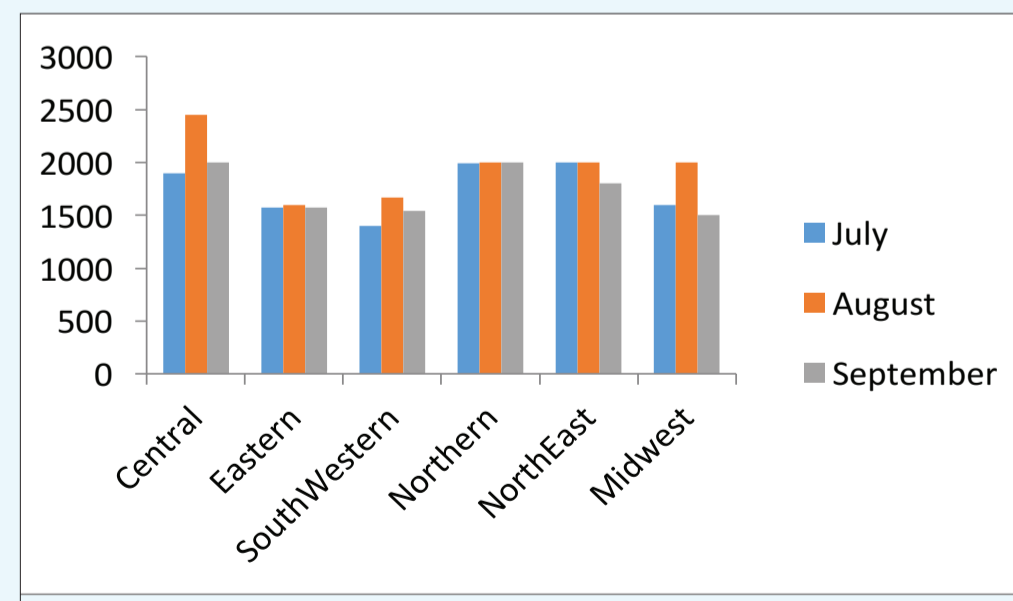
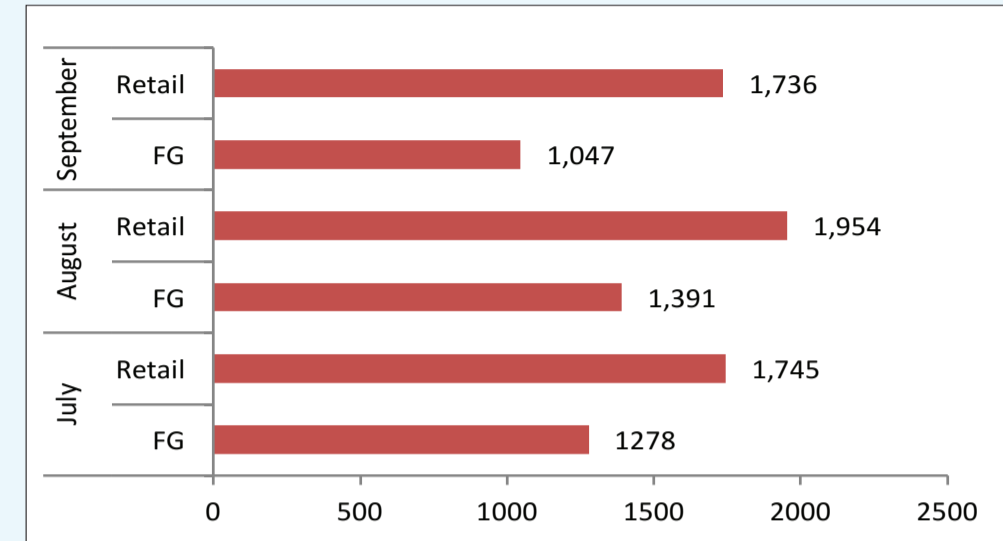


Figure 2: Regional Retail prices

The regional highest average retail price was recorded in the Central region in the month of August at shs 2450/liter, and the lowest retail price was recorded in Southwestern milk shed in the month of July at 1400shs per liter.

Source: DDA 2022

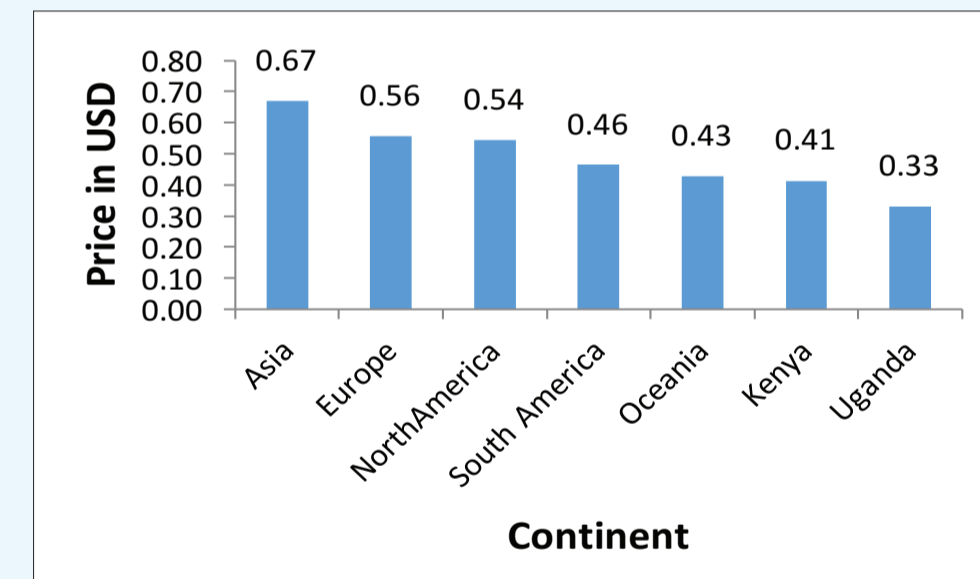
Figure 3: National average raw milk prices for the quarter



National average raw milk prices fluctuated throughout the quarter for both farm gate and retail. This was attributed to the change in weather conditions i.e. from dry to wet season. The prices were lowest in September and highest in August.

Source: DDA 2022

Figure 4: Comparison of National Average Farm gate raw milk prices at international level in Q1



The average international farm gate prices kept fluctuating during the quarter (July-September) for most countries such as Kenya, Brazil, and United States and so on except Italy whose prices were increasing.

Uganda's FGP was comparable to that of Kenya but far less in comparison to Asia, Europe and North America. This can be attributed to the differences in costs of production.

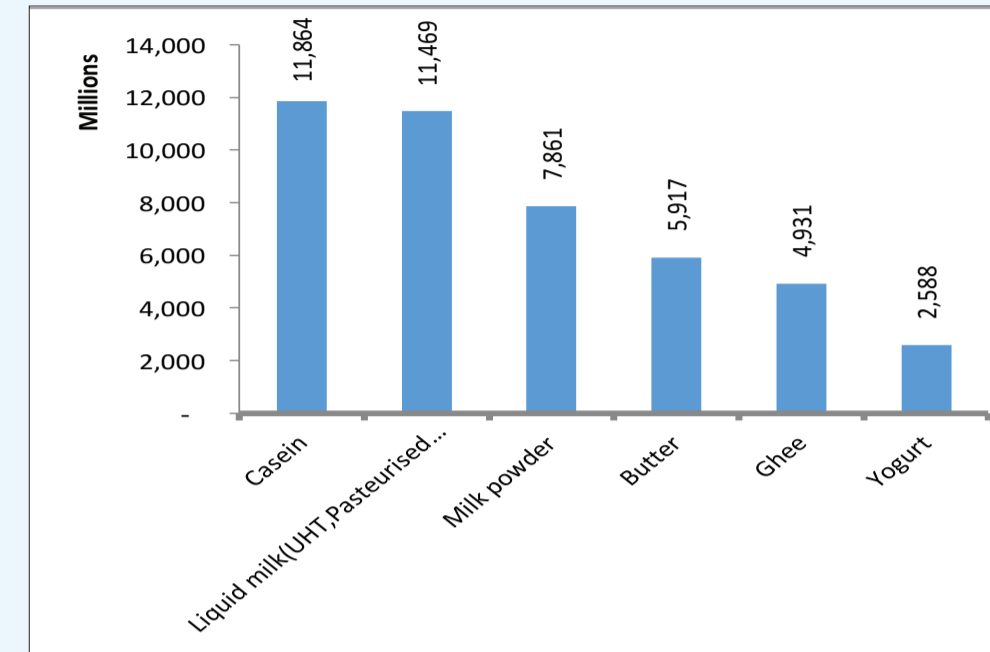
Source : https://www.clal.it/en/?section=grafici_latte

DAIRY EXPORTS

Figure 5: Dairy exports performance during the quarter

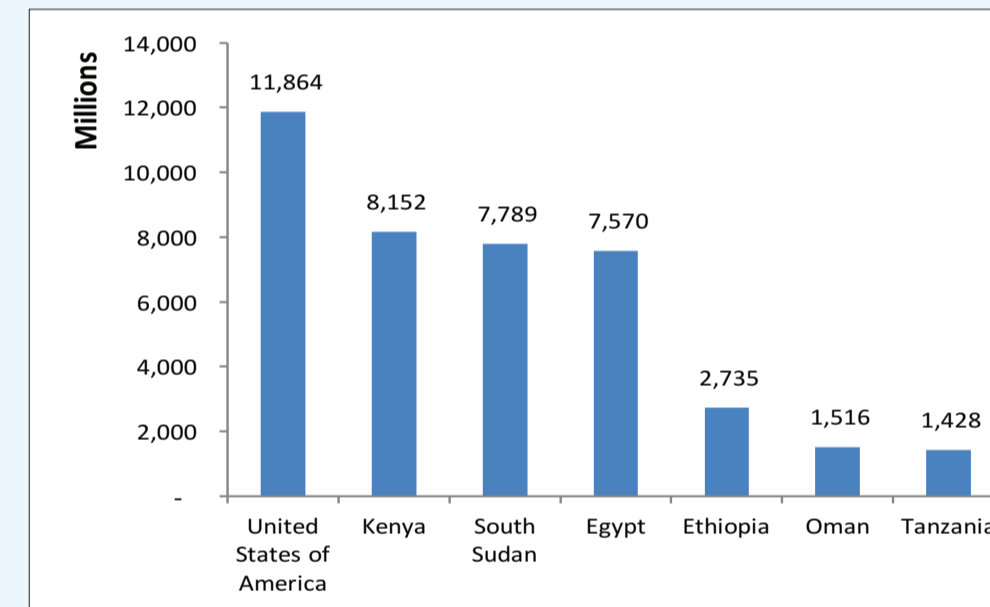
The total value of dairy exports for the quarter was Ugx 45,300,905,160. There was a 70% decrease in exports during the quarter (Q1) compared to the last quarter (Q4 Ugx 150,353,748,177)

The major 6 dairy exports during the quarter were Liquid milk, Casein, Butter, milk powder, Ghee and Yoghurt. Casein was the most exported dairy product with a value of Ugx 11,863,725,543 accounting for 26% of the total value of dairy exports during the quarter. All the casein was exported to the United States.



Source: URA custom data

Figure 5: Export destination countries in Q1

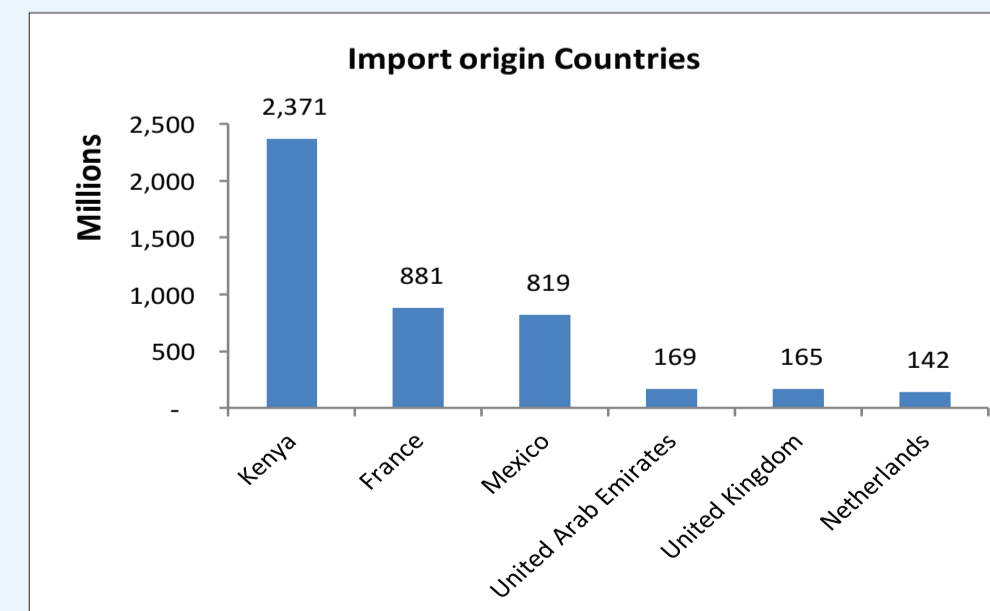


The country exported dairy products to the 14 destination countries mainly in Africa, Asia and North America.

The US was the biggest export destination accounting for 26 % of the total dairy exports for the destinations during the quarter followed by Kenya and South Sudan.

Source: URA custom data

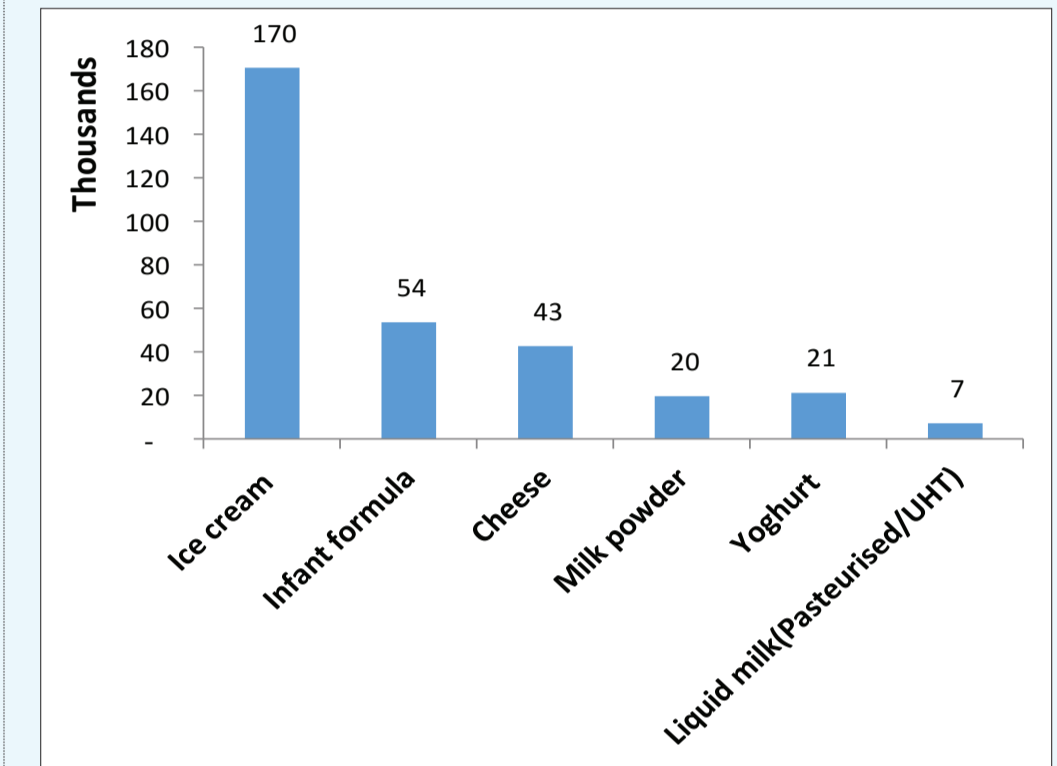
Figure 6: Dairy Imports



The total value of imports during the quarter was Ugx 4,861,661,418.

Uganda imported several dairy products from a total of 26 countries with Kenya being our leading importing country accounting for 49% of the imports followed by France. The imported dairy products during the quarter were Infant formula, Casein, Ghee Butter, Cheese, Milk powder, Liquid milk, Ice cream and Yoghurt with a total import value of Ugx. 4,861,661,418.

Figure 7: Distribution of dairy Imports during the Quarter.



Ice cream was the most imported product accounting for 46% of the total dairy imports during the quarter followed by Infant formula and Cheese

Table 1: Top 10 Countries of Origin for Dairy imports during the Quarter.

Country	Value in Ugx	Products
Kenya	2,371,051,394	Cheese, Ice cream, Liquid milk, Milk powder, Yoghurt
France	881,149,875	Butter, Cheese, Infant formula, Liquid milk
Mexico	818,957,957	Infant formula, Milk powder
United Arab Emirates	168,974,324	Cheese, Infant formula, Liquid milk, Milk powder, Yoghurt
United Kingdom	165,062,156	Butter, Infant formula, Milk powder
Netherlands	142,276,772	Cheese, Infant formula, Liquid milk, Milk powder, Yoghurt
Zambia	121,920,213	Cheese, Infant formula
Iran	55,873,578	Ice cream
Belgium	45,846,531	Butter, Cheese, Infant formula, Liquid milk, Ice cream, Yoghurt, Milk powder,
Rwanda	22,949,399	Cheese, Infant formula.

CONCLUSION

The dairy industry performed less in the quarter as compared to the previous quarter. The country's dairy export value (45,300,905,160Ugx) was far much greater than the import value (4,861,661,418 Ugx) during the quarter thereby enjoying a favorable balance of trade for the dairy industry.