TSAVONE
CONSULTING

PUBLICATION

PUB-007

PUBLICATIONS

Uganda Agrifood Outlook

First edition, 2026/27: farms, food prices, coffee and market access in a tighter year

GROUND → DATA → INSIGHT → DECISION

TSV-PUB-007

First edition, 2026/27

Contents

1. About this Outlook
2. Executive summary
3. Key indicators
4. Agriculture in the economy
5. The 2026 seasons
6. Food prices and inflation
7. Food security and nutrition
8. Agricultural exports and trade
9. Public spending, credit and tax
10. Market access: EUDR and standards
11. Climate and other risks
12. Outlook for 2026/27
13. Implications for decision-makers
14. Evidence gaps and what Tsavone will measure
15. Methods note
16. Related publications
17. Sources

    Annex A: Definitions

    Annex B: Agrifood calendar for 2026/27

> **The first edition of Tsavone's annual Outlook on Uganda's agrifood system, built from public, cited data. It reports strong agricultural growth in 2025/26 followed by drought in Karamoja, falling coffee earnings, rising food prices and an emergency interest rate rise, and reviews 2026/27 budget measures and EUDR readiness. It sets out three scenarios for 2026/27, implications for decision-makers and the evidence gaps Tsavone will measure in later editions.**

About this publication

Published by

Tsavone Consulting, Kampala, Uganda. www.tsavone.com · info@tsavone.com · +256704579186

Edition

First edition, 2026/27

Lead author

Patrick Engoru

How to cite

Tsavone Consulting (2026). *Uganda Agrifood Outlook*. First edition, 2026/27. Publication TSV-PUB-007. Kampala, Uganda: Tsavone Consulting. Lead author: Patrick Engoru. Available at: www.tsavone.com/publications

Data cut-off

29 October 2026. Figures are as reported by the sources listed in this publication on that date.

Copyright

© 2026 Tsavone Consulting. You are welcome to share and quote this publication for non-commercial purposes with full acknowledgement. Please contact us for any other use.

Disclaimer

This publication is provided for information. It is not investment, legal or financial advice. Tsavone Consulting has taken care to check the facts it reports, and will publish any corrections at www.tsavone.com.

1. About this Outlook

The **Uganda Agrifood Outlook** is an annual Tsavone Consulting publication on the state of Uganda's farms, food markets and agricultural trade, and what they mean for the year ahead. This first edition covers the 2026/27 financial year. It is written for decision-makers in government, development partners, lenders and investors, exporters and processors, farmer organisations and NGOs.

This edition is built from public data that readers can check. It draws on official statistics and published sources rather than new survey data. Every figure states its source and period in the text and appears in the Sources section with a web address. Where sources disagree we say so. Where a figure is an official's statement or a media report of an official release rather than a published statistic, we say so. Where no reliable public figure exists, we describe the indicator and say what Tsavone will measure in later editions.

The data cut-off is 29 October 2026. Monthly series for prices, exports and food security change quickly; readers should check the latest releases from UBOS, the Bank of Uganda, the Ministry of Finance, Planning and Economic Development (MoFPED), the Ministry of Agriculture, Animal Industry and Fisheries (MAAIF), FEWS NET, FAO and the IPC partnership before making operational decisions.

1.1 Scope

- Agriculture's place in the economy: output, jobs and poverty.
- The 2026 seasons: rainfall, harvests and the Karamoja crisis.
- Food prices and inflation.
- Food security and nutrition.

- Agricultural exports, with a focus on coffee, regional food trade and fish.
- Public spending, credit and tax measures affecting agriculture in 2026/27.
- Market access rules, especially the EU Deforestation Regulation (EUDR).
- Climate and other risks, our outlook scenarios and implications for decision-makers.

This Outlook reports public data. It does not report Tsavone assignment findings and does not represent the views of any client, ministry or development partner.

2. Executive summary

Agriculture grew strongly in 2025/26 but the second half of 2026 has been harder. UBOS preliminary estimates put agriculture's share of GDP at 26.2% in 2025/26, with growth of 6.5%, led by cash crops (12.1%) while food crops grew by 4.9% (UBOS, as reported by Daily Monitor, 2026) [S1]. The whole economy grew by 6.4% (UBOS, 2026) [S2]. Since mid-2026, drought in Karamoja and parts of the cattle corridor, falling coffee prices and volumes, a weaker shilling and an emergency interest rate rise have changed the picture.

Coffee earnings peaked and are now falling. Coffee exports earned about US$2.27 billion from 7.93 million 60-kg bags in the year from September 2024 to August 2025 (MAAIF, as reported by Food Business MEA, 2025) [S3], and about US$2.4 billion in the twelve months to March 2026 (CMB News, 2026) [S4]. Monthly earnings then fell year on year: US$181.7 million from 737,766 bags in August 2026, down 11.6% in value and 13.7% in volume from August 2025 (MAAIF, as reported by Arab News citing Reuters, 2026) [S5]. FEWS NET reported that dry spells cut coffee yields and quality by about 10% in central and south-western Uganda and that coffee prices fell 14.5% (FEWS NET, 2026) [S6].

Gold, not agriculture, now drives export growth. In July 2026 gold earned US$788.45 million of US$1.402 billion in merchandise exports, while coffee earned US$204.94 million (MoFPED, as reported by Daily Monitor, 2026) [S7]. The Bank of Uganda cited weaker agricultural export earnings among the reasons for its October 2026 rate rise (Bank of Uganda, as reported by Nairametrics, 2026) [S8].

Food prices have turned up. Headline inflation rose to 4.6% in September 2026 and food inflation to 4.7% (UBOS, via Trading Economics, 2026) [S9]. FEWS NET reports that food crop inflation jumped from 1.2% in August to 7.0% in September [S6]. The Bank of Uganda projects headline inflation to average 7.0% to 7.5% over the next twelve months and raised the Central Bank Rate from 9.75% to 12% on 14 October 2026 [S8].

Hunger is rising, especially in Karamoja and refugee settlements. The national IPC analysis released on 22 October 2026 reported about 3.6 million people in high acute food insecurity in August and September 2026, projected to reach 4.4 million in February to June 2027 (Nile Post and Daily Monitor, 2026, reporting IPC) [S10, S11]. In Karamoja an earlier IPC analysis found 473,000 people in high acute food insecurity from April to July 2026 (Daily Monitor, 2026) [S12], and the Office of the Prime Minister reported at least 16 deaths linked to drought-induced food shortages in July 2026 (Xinhua via The Star, 2026) [S13].

Public money for agriculture is concentrated in a few large programmes. The approved 2026/27 budget of Shs84.39 trillion allocates Shs2.26 trillion to agro-industrialisation and Shs2.43 trillion to wealth creation, including Shs1.059 trillion for the Parish Development Model (PDM) and Shs50 billion for the Agricultural Credit Facility (KPMG, 2026) [S14]. Credit remains expensive: the weighted average shilling lending rate was 18.73% in February 2026, before the October rate rise (MoFPED, as reported by Eagle Online, 2026) [S15].

EUDR compliance is now urgent. The EU Deforestation Regulation applies to large and medium operators from 30 December 2026 and to micro and small operators outside timber from 30 June 2027 (Hogan Lovells, 2026) [S16]. Coffee is the exposed Ugandan commodity. By March 2025, about 805,000 coffee farmers had been registered and 900,000 farm polygons mapped, but only about US$1 million of an estimated US$25 million needed for full compliance had been secured (AHK Eastern Africa) [S17].

2.1 Our central outlook for 2026/27

Our central scenario is **slower growth under tighter money**: agriculture continues to grow but below 2025/26 rates; coffee earnings are lower than in 2025/26 because of lower prices and drought-affected volumes; food prices rise through the first half of 2027; Karamoja and refugee settlements stay in Crisis; and the September to December rains, forecast near-normal to above-normal, support second-season food crops but bring flood and post-harvest losses. Section 12 sets out the downside and upside cases and the signals to watch.

2.2 Five messages for decision-makers

1. Prepare for lower coffee earnings in 2026/27 and protect farmer margins through quality, aggregation and EUDR-ready traceability, not volume alone.
2. Treat food price risk as a household welfare risk. Poor households, refugees and Karamoja pastoralists buy much of their food and are most exposed to the current rise.
3. Use the second season. Above-normal rain can raise food output if seed, labour and storage are ready; it can also raise aflatoxin and post-harvest losses if they are not.
4. Link public programmes to market outcomes. Report PDM and Agricultural Credit Facility results in farmer income, yields and sales, not only disbursements.
5. Invest in evidence. Uganda lacks a recent public series on farm-gate prices, yields and farm incomes by region. The next national agricultural survey results should be published in full.

3. Key indicators

Indicator	Latest value	Period	Source
Real GDP growth	6.4%	FY2025/26 (preliminary)	UBOS [S2]
Agriculture share of GDP	26.2% (26.1% in 2024/25)	FY2025/26	UBOS via Daily Monitor [S1]
Agriculture growth / food crops / cash crops	6.5% / 4.9% / 12.1%	FY2025/26	UBOS via Daily Monitor [S1]
Working-age population in subsistence agriculture	About 40%	2021	UBOS NLFS 2021 [S18]
Employment on main job in agriculture, forestry and fishing	36%	2021	UBOS NLFS 2021 [S18]
National poverty rate	16.1% (20.3% in 2019/20)	2023/24	UBOS UNHS via Daily Monitor [S19]
Karamoja poverty rate	74.2% (65% in 2019/20)	2023/24	UBOS UNHS via Daily Monitor [S19]

Indicator	Latest value	Period	Source
Headline / food inflation	4.6% / 4.7%	Sep 2026	UBOS via Trading Economics [S9]
Food crop inflation	7.0% (1.2% in Aug)	Sep 2026	FEWS NET citing UBOS [S6]
Central Bank Rate	12.0% (from 9.75%)	14 Oct 2026	Bank of Uganda via Nairametrics [S8]
Weighted average shilling lending rate	18.73%	Feb 2026	MoFPED via Eagle Online [S15]
Coffee exports, 12 months	7.93 million bags; US$2.27 billion	Sep 2024 to Aug 2025	MAAIF via Food Business MEA [S3]
Coffee exports, 12 months	About US$2.4 billion	Apr 2025 to Mar 2026	CMB News [S4]; KPMG [S14]
Coffee exports, month	737,766 bags; US$181.7 million	Aug 2026	MAAIF via Reuters/Arab News [S5]
Coffee production forecast	9.3 million bags	2025/26 season	MAAIF via Food Business MEA [S3]
Fish exports	US$216.42 million (US$155.20 million in 2023/24)	FY2024/25	MAAIF fisheries fact sheet [S20]
Fish catch	727,034 tonnes	2024	MAAIF fisheries fact sheet [S20]
People in high acute food insecurity (IPC)	About 3.6 million; 4.4 million projected Feb to Jun 2027	Aug to Sep 2026	IPC via Nile Post [S10]
Agro-industrialisation budget	Shs2.26 trillion	FY2026/27	KPMG Budget Brief [S14]
Parish Development Model budget	Shs1.059 trillion	FY2026/27	KPMG Budget Brief [S14]

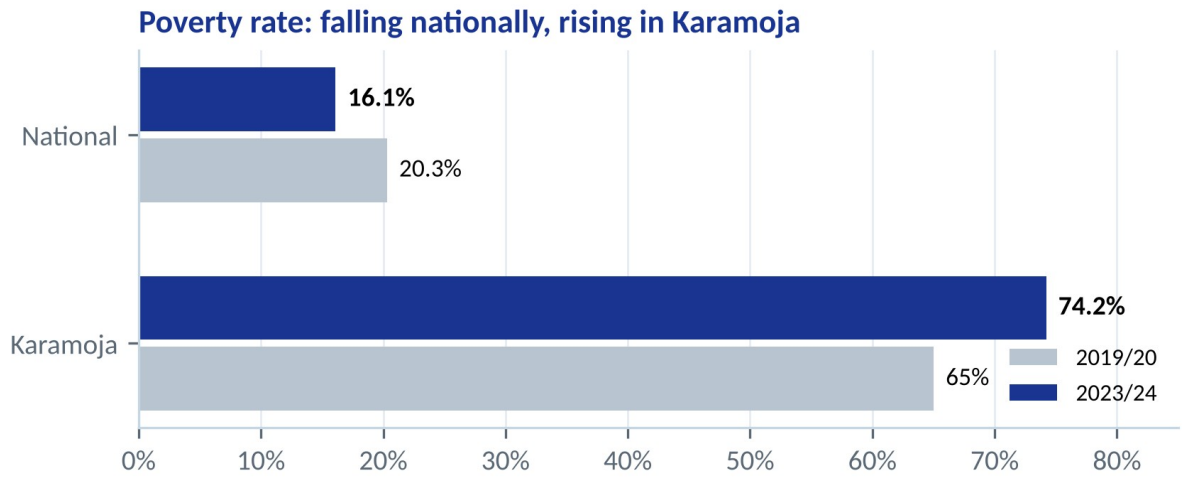


Figure 1. Poverty fell nationally but rose sharply in Karamoja
Source: UBOS Uganda National Household Survey 2023/24, reported by Daily Monitor [S19].

4. Agriculture in the economy

4.1 Output

Agriculture, forestry and fishing remain a quarter of Uganda's economy. UBOS preliminary estimates for 2025/26 show agriculture at 26.2% of GDP, services at 42.1% and industry at 24.1%, in a nominal GDP of Shs250.4 trillion (UBOS, as reported by Daily Monitor, 2026) [S1]. Agriculture grew by 6.5%, slightly faster than the economy as a whole. Cash crops, led by coffee, grew by 12.1%, while food crops grew by 4.9% [S1].

These are preliminary estimates and are usually revised. Later editions will report the revised series from the UBOS annual GDP tables and break agriculture down by cash crops, food crops, livestock, forestry and fishing.

4.2 Jobs and livelihoods

Agriculture's share of jobs is larger than its share of output. The 2021 National Labour Force Survey found that about 40% of the working-age population was engaged in subsistence agriculture, and that agriculture, forestry and fishing accounted for 36% of employment on the main job (UBOS, 2022) [S18]. Many people farm alongside another main activity, so agriculture's role in household income is larger than the employment figure alone suggests. Uganda's population was about 45.9 million at the 2024 census (UBOS, 2024) [S21].

4.3 Poverty

The 2023/24 Uganda National Household Survey reported national poverty falling from 20.3% in 2019/20 to 16.1%, and the number of poor people from 8.3 million to about 7 million. Karamoja moved the other way, with poverty rising from 65% to 74.2% (UBOS, as reported by Daily Monitor, 2025) [S19]. Rural poverty remains higher than urban poverty. The rise in Karamoja poverty before the 2026 drought helps explain the severity of this year's food crisis there.

> **Agriculture can reduce poverty only if growth reaches food crop farmers and pastoralists, not only cash crop exporters. In 2025/26 cash crops grew more than twice as fast as food crops [S1].**

5. The 2026 seasons

5.1 Uganda's two farming systems

Most of Uganda has two rainy seasons (bimodal): a first season with planting from about February to April and harvests from June to August, and a second season with planting from about August to September and harvests from November to January. Karamoja in the north-east has one long season (unimodal), with harvests from about August to October. This calendar is the basis for FEWS NET and FAO GIEWS seasonal analysis [S22, S23].

5.2 First season 2026 (bimodal areas)

FAO GIEWS reported in May 2026 that first-season rains in bimodal areas were timely and abundant, with western areas at nearly twice their long-term average by late April, but that erratic distribution around Lake Victoria could cause localised shortfalls (FAO GIEWS, 2026) [S23]. FEWS NET's June 2026 outlook expected near-average harvests in bimodal areas despite poor rainfall distribution, supported by drought-tolerant maize and bean varieties (FEWS NET, 2026) [S22]. Its September update then reported prolonged dry spells in central and south-western Uganda in the second half of the season, which reduced coffee yields and quality by about 10% and damaged bananas [S6].

5.3 Karamoja

Karamoja had a poor 2026 season. GIEWS reported a false start to the rains that forced replanting [S23]. FEWS NET's June outlook expected below-average cereal and pulse harvests, a poor sorghum harvest and near-average root crops, and cited crop losses of 50% to 70% in most areas [S22]. The IPC analysis for April to July 2026 found 473,000 people in high acute food insecurity, with up to 45% in Crisis or worse in the worst-affected districts of Kaabong, Kotido, Karenga, Moroto and Nabilatuk (Daily Monitor, 2026, reporting IPC) [S12]. The Office of the Prime Minister reported at least 16 deaths linked to drought-induced food shortages in July 2026 and began emergency food distributions (Xinhua via The Star, 2026) [S13]. On 20 July 2026 the Office of the Prime Minister announced relief of about 9,420 tonnes of maize flour and beans for 313,987 households in nine Karamoja districts (OPM, as reported by Nile Post via AllAfrica, 2026) [S24].

Livestock holdings among poor Karamoja households are very low, which limits their ability to cope by selling animals (FEWS NET, 2026) [S22]. Foot and mouth disease restrictions elsewhere, including Nakasongola, have cut incomes from livestock; FEWS NET, citing a news report, said daily milk output in districts such as Kasese had dropped from about 40,000 litres to under 1,000 [S6].

5.4 Second season 2026 and the rains outlook

The Ministry of Water and Environment forecast near-normal to above-normal rainfall for September to December 2026, with most of the country expected to receive about 25% more than the long-term average and some areas receiving rain into January 2027, linked to El Nino and the Indian Ocean Dipole (Daily Monitor, 2026) [S25]. FEWS NET similarly expects heavy rains from October to December that could produce above-average seasonal totals [S6]. This is good for second-season food crops where seed and labour are in place, but it brings risks of floods, landslides in highland areas, waterlogging, crop disease and post-harvest losses, including aflatoxin in poorly dried maize and groundnuts.

Area	Season status (2026)	Outlook to January 2027	Source
Bimodal areas, first season	Near-average harvests; late-season dry spells in central and south-west	Second season supported by above-normal rains; flood and post-harvest risk	FEWS NET [S22, S6]; GIEWS [S23]

Area	Season status (2026)	Outlook to January 2027	Source
Coffee areas (central, south-west)	Yields and quality down about 10% after dry spells	Tsavone judgement: 2026/27 volumes likely below the 9.3 million bags forecast for 2025/26	FEWS NET [S6]; MAAIF [S3]
Karamoja	Poor harvest; crop losses 50% to 70% in most areas	Crisis (IPC Phase 3) to January	FEWS NET [S22, S6]
Refugee settlements	Reduced assistance; reliance on markets	Crisis expected in all settlements October to January	FEWS NET [S6]

6. Food prices and inflation

6.1 National inflation

Uganda had low inflation through most of 2025/26. Headline inflation was 3.7% and core 3.4% in June 2026 (IMF, 2026) [S26]. GIEWS reported annual food inflation of about 2.5% in April 2026 [S23]. Prices then turned up. Headline inflation was 4.1% in August and 4.6% in September 2026; core inflation was 3.7% and food inflation 4.7% in September (UBOS, via Trading Economics, 2026) [S9]. FEWS NET reported that food crop inflation, a narrower and more volatile UBOS measure, jumped from 1.2% in August to 7.0% in September [S6].

The Bank of Uganda's emergency Monetary Policy Committee on 14 October 2026 projected headline inflation to average 7.0% to 7.5% over the next twelve months and core inflation 5.5% to 6.0%, above its 5% medium-term target. It cited shilling depreciation, higher global energy prices, imported inflation risk and fuel and food price pressures (Bank of Uganda, as reported by Nairametrics, 2026) [S8]. FEWS NET reported that the shilling depreciated by 4% to 5% between late August and mid-September and that petrol cost about Shs6,529 per litre [S6].

6.2 Staple food prices

FEWS NET's market monitoring gives the best public picture of staple prices:

Commodity	Price position	Period	Source
Maize	Near the five-year average; similar to March 2025	Mid-March 2026	FEWS NET [S27]
Beans	Similar to five-year average; about 20% above March 2025	Mid-March 2026	FEWS NET [S27]
Maize	9% below last year; 4% above five-year average	May 2026	FEWS NET [S22]
Beans	24% below last year; 11% below five-year average	May 2026	FEWS NET [S22]
Sorghum	25% above last year; 26% above five-year average	May 2026	FEWS NET [S22]
Cassava	35% above last year; 38% above five-year average	May 2026	FEWS NET [S22]

Commodity	Price position	Period	Source
Beans / bananas	Up 6.3% / up 16% (month to mid-September)	Sep 2026	FEWS NET [S6]

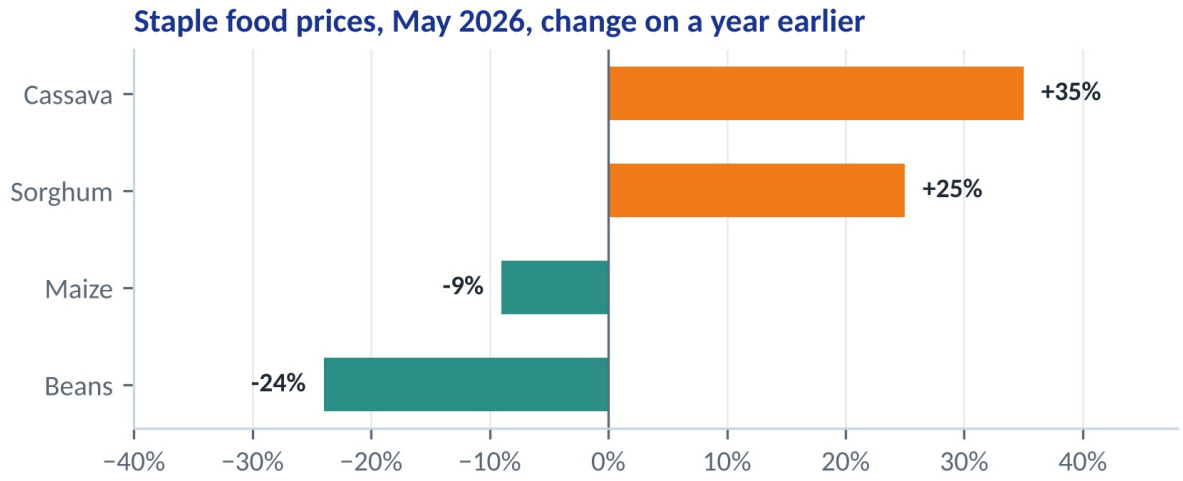


Figure 2. Staple food prices in May 2026 compared with May 2025
Source: FEWS NET [S22].

Sorghum and cassava, staples for poorer households in the north and north-east, were the most expensive relative to normal in mid-2026. FEWS NET expected staple cereal prices to rise in September and October, especially in Karamoja, and to fall from November to January with the second-season harvest, but by less than usual [S22].

6.3 Regional demand

Regional demand affects Ugandan prices. A Daily Monitor report in 2026 described Kenyan demand for maize driving price rises in Uganda, with dry maize in Kampala markets rising from Shs105,000 to 125,000 per 100 kg in January to Shs135,000 to 150,000, and farm-gate maize in Mbale and Busia rising from about Shs900 to Shs1,400 per kg (Daily Monitor, 2026) [S28]. The same report cited the Grain Council of Uganda's estimate of an exportable maize surplus of over one million tonnes this season, and noted that Kenya's maize imports rose by 51.4% to 468,109 tonnes in 2025 [S28]. Higher maize prices help surplus farmers but raise costs for poultry and livestock feed: the same report noted an 18% rise in feed prices in one month.

> **Price rises do not affect all farmers equally. Surplus producers gain; net buyers, including most poor rural households, pastoralists in Karamoja and refugees, lose.**

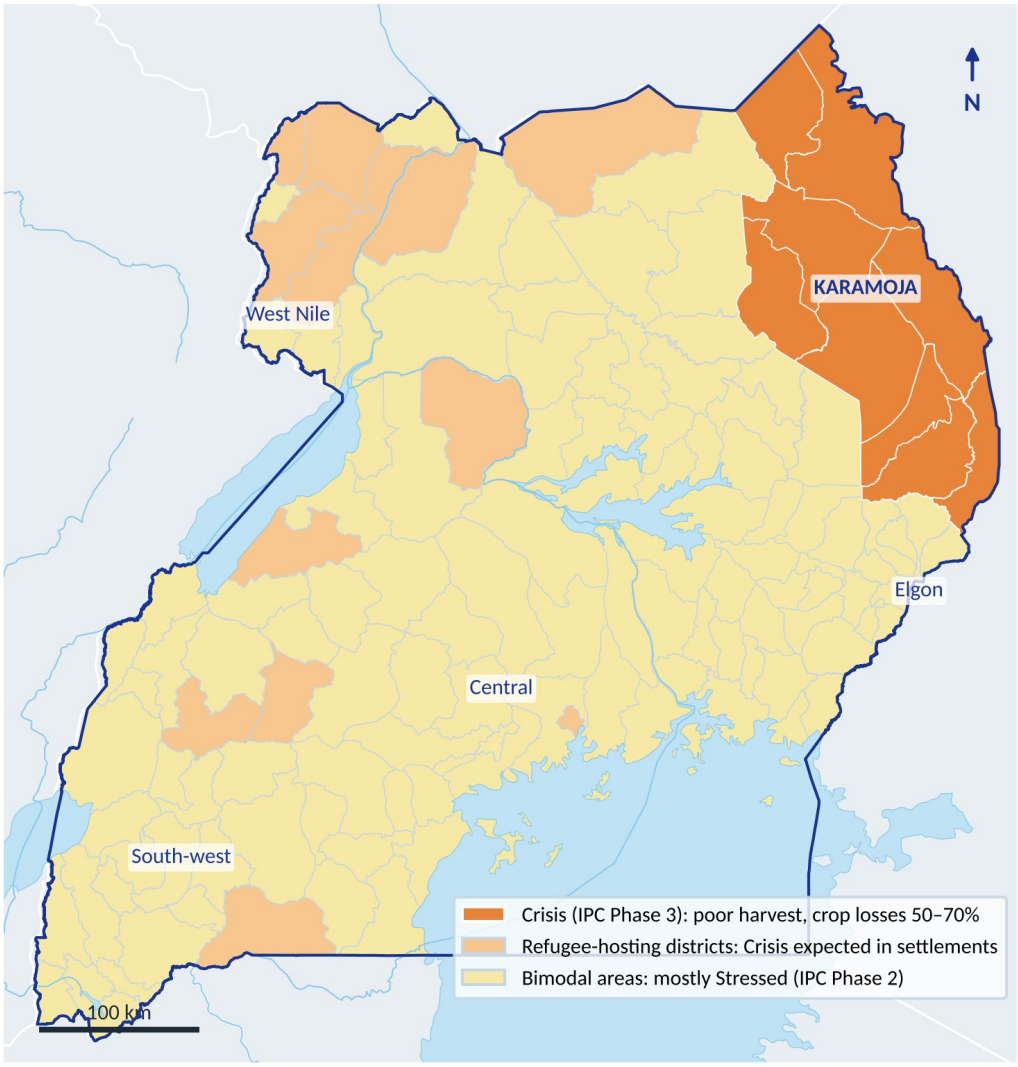
7. Food security and nutrition

The IPC analysis released jointly by the Government of Uganda, the UN and partners on 22 October 2026 covered 60 districts. Media reports of the release state that about 3.6 million people were in high acute food insecurity in August and September 2026, projected to rise to 4.4 million in February to June 2027, and that 465,900 children under five and 246,300 pregnant and breastfeeding women would need treatment for acute malnutrition between April 2026 and March 2027 (Nile Post via AllAfrica, 2026; Daily Monitor, 2026) [S10, S11]. The UN Resident Coordinator attributed the crisis to recurrent climate shocks,

declining agricultural production, crop and livestock pests and diseases and high food prices [S10]. Nile Post reported a UN and partners' joint appeal of US$50 million for the emergency response in Karamoja and early action in 37 districts and eight refugee settlements [S10]. The Independent reported the appeal at about US$61 million, with a funding gap of US$50 million after more than US$17 million had been mobilised (The Independent via AllAfrica, 2026) [S38].

FEWS NET estimated in June 2026 that 2.5 to 2.99 million people would need humanitarian food assistance between June 2026 and January 2027, with needs peaking from September to November [S22]. Its September update expected Crisis (IPC Phase 3) to persist in Karamoja through January 2027 and across all refugee settlements from October to January, with most bimodal areas at Stressed (IPC Phase 2) [S6, S22].

Group or area	Situation	Source
Karamoja	473,000 in high acute food insecurity (April to July 2026); Crisis expected to January 2027; at least 16 drought-linked deaths reported in July 2026	IPC via Daily Monitor [S12]; FEWS NET [S6]; OPM via Xinhua [S13]
Refugee settlements	About 712,000 refugees (37% of analysed) in IPC Phase 3 or worse, August 2025 to February 2026; Crisis expected in all settlements October 2026 to January 2027	IPC via FAO GIEWS [S23]; FEWS NET [S6]
Bimodal areas	Mostly Stressed (IPC Phase 2); central region Minimal (IPC Phase 1)	FEWS NET [S22]
National	About 3.6 million in high acute food insecurity (Aug to Sep 2026); 4.4 million projected (Feb to Jun 2027)	IPC via Nile Post [S10]



Simplified by Tsavone from FEWS NET outlook narrative (2026); not an official IPC map. Boundaries: Uganda administrative boundaries (135 districts, OCHA/UBOS 2020).

Figure 3. Where food insecurity is most severe, 2026

Simplified by Tsavone from FEWS NET outlook narrative [S6, S22] and IPC reporting [S12]; not an official IPC map. Boundaries: Uganda administrative boundaries, 135 districts (OCHA/UBOS, 2020).

For the agrifood system, the message is that national production growth has not translated into food security for the poorest areas. Tsavone's companion publication, the Uganda Refugee Economy Outlook, covers settlement food security and assistance in more detail.

8. Agricultural exports and trade

8.1 The export picture

Uganda's export earnings rose sharply in 2025/26, but mainly because of gold. Total export earnings for July 2025 to May 2026 were reported at US$10.2 billion, against US$6.5 billion in the same period a year earlier (State of the Nation Address, as reported by Nile Post via AllAfrica, 2026) [S29]. In April 2026 gold earned US$866.10 million of US$1.40 billion in merchandise exports, while coffee earned US$150.81 million (MoFPED, as reported by Eagle Online, 2026) [S30]. In July 2026 gold earned US$788.45 million and coffee US$204.94 million of US$1.402 billion [S7]. Agriculture's share of export earnings is therefore falling even where agricultural volumes hold up.

8.2 Coffee

Coffee is Uganda's most important agricultural export and the commodity most exposed to global prices and EU rules. Key figures:

Period	Volume (60-kg bags)	Value (US$)	Note	Source
Sep 2024 to Aug 2025 (12 months)	7.93 million	2.27 billion	Volume +17.9%, value +58.7% year on year	MAAIF via Food Business MEA [S3]
Apr 2025 to Mar 2026 (12 months)	Not stated	About 2.4 billion (KPMG: 2.46 billion)	Up from about 1.8 billion	CMB News [S4]; KPMG [S14]
March 2026	671,152	Down 13.6% year on year	Volume +2.9%	CMB News [S4]
April 2026	591,687	150.81 million	Average US$4.25/kg (US$5.15 a year earlier)	MoFPED via Eagle Online [S30]
May 2026	617,491	151.7 million	May 2025: 793,445 bags, US$244 million	MAAIF via Africanews [S31]
July 2026	846,686	204.94 million	Average US$4.03/kg (US$4.20 a year earlier)	MoFPED via Daily Monitor [S7]
August 2026	737,766	181.7 million	Volume -13.7%, value -11.6% year on year	MAAIF via Arab News/Reuters [S5]

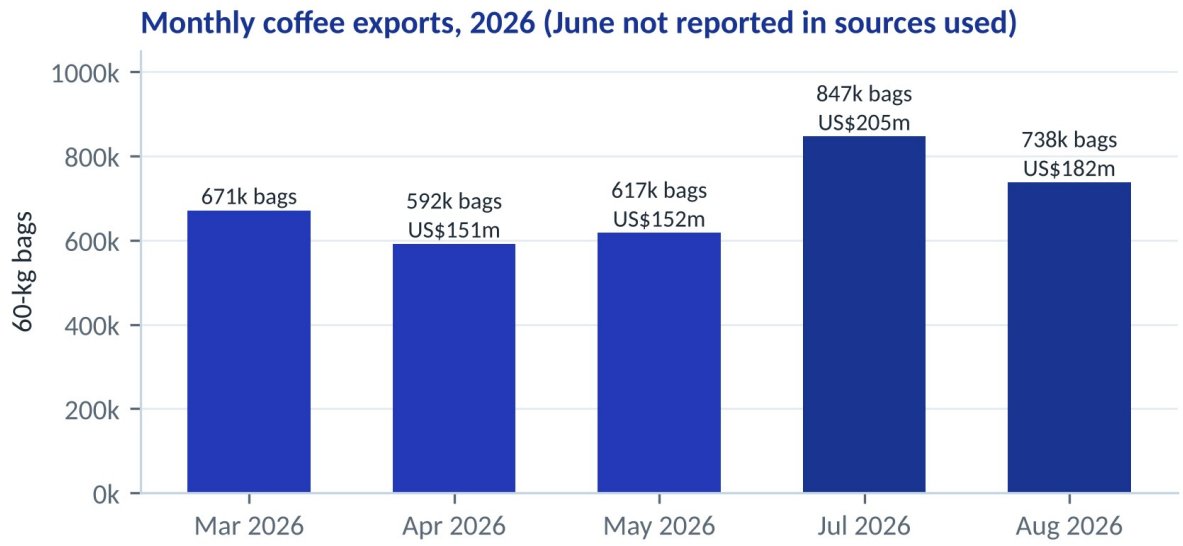


Figure 4. Monthly coffee exports in 2026

Sources: CMB News [S4]; MoFPED via Eagle Online [S30]; MAAIF via Africanews [S31]; MoFPED via Daily Monitor [S7]; MAAIF via Arab News/Reuters [S5]. March value reported only as a year-on-year change.

The pattern is clear. Record earnings in 2024/25 and early 2025/26 came from high world prices and strong volumes. From early 2026, world prices eased on expectations of a larger Brazilian harvest [S31], and from mid-2026 dry spells reduced Ugandan yields and quality [S6]. MAAIF had forecast 2025/26 production of 9.3 million bags, up 14.8% (MAAIF, as reported by Food Business MEA, 2025) [S3]. On 1

April 2026, UCDA daily market reports quoted Robusta Screen 18 at about 174.7 US cents per pound and Bugisu AA Arabica at about 293.3 US cents per pound (CMB News, 2026) [S4].

For 2026/27 we expect lower coffee earnings than in 2025/26 because both price and volume are lower in the latest monthly data. The scale of the fall will depend on world prices, on the effect of the late-2026 rains on the next crop, and on EUDR readiness from 30 December 2026.

8.3 Regional food trade

Regional markets absorb much of Uganda's food exports, and their direction is shifting. Bank of Uganda data reported by the Daily Monitor in August 2026 showed monthly export receipts from the DRC rising to US$79.4 million in June 2026, while receipts from Kenya fell to US$19.8 million, down more than 72% from a peak of US$72 million in May 2025; Kenya dropped out of Uganda's top three export destinations (Daily Monitor, 2026) [S32]. South Sudan was named as another market absorbing volumes lost from Kenya [S32]. These are total export receipts, not food alone, but the shift matters for maize, beans, sugar, dairy and processed food exporters.

8.4 Fish

MAAIF's fisheries fact sheet reports fish catch rising from 566,261 tonnes in 2020 to 727,034 tonnes in 2024, with production valued at Shs2.087 trillion in 2024, and fish export earnings rising from US$155.20 million in 2023/24 to US$216.42 million in 2024/25 (MAAIF, 2026) [S20]. Uganda gained EU approval for farmed fish exports in 2026 (Food Business MEA, 2026) [S33]; later editions will report whether this translates into aquaculture export volumes.

8.5 Other commodities

We did not find reliable, recent, public annual figures for tea, cocoa, dairy, maize, beans, sugar or horticulture exports in the time available. Monthly MoFPED Performance of the Economy reports and Bank of Uganda export composition tables contain these series. The second edition will report them in a standard table.

> **Gold flatters the export totals. Decision-makers should track agricultural exports separately, in volume and value, to see what is happening to farm incomes.**

9. Public spending, credit and tax

9.1 The 2026/27 budget

The approved 2026/27 budget totals Shs84.39 trillion, with domestic revenue of Shs45.96 trillion (KPMG, 2026) [S14]. Allocations most relevant to agrifood:

Programme or measure	2026/27 allocation	What it covers	Source
Agro-industrialisation	Shs2.26 trillion	Research, inputs including fertiliser, irrigation, extension, agro-processing, post-harvest storage, standards and market access	KPMG [S14]
Wealth creation (total)	Shs2.43 trillion	PDM, UDB, UDC, Agricultural Credit Facility, Emyooga, GROW, INVITE and others	KPMG [S14]

Programme or measure	2026/27 allocation	What it covers	Source
Parish Development Model	Shs1.059 trillion	Parish revolving funds for households	KPMG [S14]
Uganda Development Bank capitalisation	Shs1.0 trillion	Development lending including agro-processing	KPMG [S14]
Agricultural Credit Facility	Shs50 billion	Subsidised medium and long-term agricultural lending through banks	KPMG [S14]
Emyooga	Shs100 billion	Group savings and credit for occupational associations	KPMG [S14]
Social protection	Shs173.55 billion	Cash transfers and related programmes	KPMG [S14]

An Eagle Online report on budget day gave a much larger PDM figure of Shs4.4 trillion without showing how it was built up (Eagle Online, 2026) [S34]; it may include cumulative or multi-year amounts. We use the KPMG figure, which reflects the approved appropriation, until the MoFPED approved estimates are reviewed. The same report stated that more than four million beneficiaries were expected to have accessed parish financing by the end of June 2026 across 10,589 parishes [S34].

MoFPED projected growth of 10.2% for 2026/27, driven mainly by the start of oil production (KPMG, 2026) [S14]. The Bank of Uganda's October 2026 forecast of 6.0% to 6.5% [S8] and the IMF's July 2026 projection of 8.0% [S26] are lower. Agriculture's planning environment is therefore more uncertain than the budget assumes.

9.2 Tax measures

- The VAT registration threshold rises from Shs150 million to Shs300 million, taking more small agribusinesses out of mandatory VAT registration [S14].
- Imports of vaccines, medicines, pesticides, rodenticides, acaricides and insecticides are exempt from the 1.5% infrastructure levy and the 1% import declaration fee [S14].
- Excise duty on cooking oil doubles from Shs200 to Shs400 per litre, a new excise of Shs500 per litre applies to cooking fat, and sugar excise rises from Shs100 to Shs300 per kg, subject to presidential assent of the excise amendments [S14]. These measures raise consumer prices for basic foods and affect processors' margins.

9.3 Credit

Credit for agriculture is scarce and expensive. The weighted average lending rate on shilling loans was 18.73% in February 2026, and MoFPED reported that the contraction in private sector credit that month was most pronounced in agriculture (MoFPED, as reported by Eagle Online, 2026) [S15]. Personal and household loans took 30.1% of new approvals in February, trade 19.9% and business services 17.6% [S15]. The Bank of Uganda's October 2026 increase in the Central Bank Rate to 12% and in the cash reserve requirement from 11% to 13.5% [S8] will raise lending rates further in 2026/27. The Agricultural Credit Facility's Shs50 billion allocation [S14] is small relative to sector needs.

> **Higher interest rates fall hardest on working capital for traders, aggregators and processors in the coffee, grain and dairy chains, which borrow for weeks or months against stock.**

10. Market access: EUDR and standards

10.1 What the EUDR requires and when

The EU Deforestation Regulation requires operators placing coffee, cocoa, cattle, palm oil, rubber, soya and wood products on the EU market to show, through due diligence, that the products were not produced on land deforested after 31 December 2020 and were produced legally, with geolocation of the plots of production. After two postponements, the obligations apply from 30 December 2026 for large and medium operators and for micro and small operators in the timber sector, and from 30 June 2027 for other micro and small operators. A simplification package published by the European Commission on 4 May 2026 is expected to cut annual compliance costs by about 75% compared with the original rules while keeping the core due diligence duties, and a draft delegated act proposes adding soluble instant coffee to the product scope (Hogan Lovells, 2026) [S16].

In May 2025 the Commission published its first country benchmarking list, naming only Belarus, North Korea, Myanmar and Russia as high risk (CMS, 2025) [S35]. Uganda was not named as low risk and therefore falls in the standard risk category (CMS, 2025; Tracextech) [S35, S37]. Standard risk means full due diligence applies to Ugandan coffee and cocoa shipped to the EU.

10.2 Uganda's readiness

The EU is Uganda's largest coffee market, reported to take about 70% of coffee exports (AHK Eastern Africa) [S17]. Uganda has built a national coffee farmer registration and mapping system: about 805,000 coffee farmers were registered and 900,000 farm polygons digitally mapped by March 2025, covering nearly 70% of the coffee value chain. The same source reported that only about US$1 million of an estimated US$25 million needed for full compliance had been secured [S17]. Tsavone's Ground Truth brief on EUDR readiness (www.tsavone.com/insights) sets out what Ugandan exporters will be asked for.

Readiness question	What buyers will ask	Where the gaps usually are
Can every lot be traced to mapped plots?	Geolocation for each plot, linked to the lot	Mixing at village traders and hullers; farmers not yet mapped
Is the land deforestation-free since 2020?	Evidence against satellite forest maps	Plots near forest reserves, wetlands and in the Albertine and Elgon areas
Was the coffee produced legally?	Land tenure, labour and environmental compliance	Customary land without documents; child labour risk at harvest
Can the exporter show due diligence records?	Risk assessment and mitigation file	Small exporters without compliance systems

Tsavone's supply-chain assurance and export readiness methods for this work are shared with clients on request.

11. Climate and other risks

Risk	Evidence	Who is most exposed	Source
Drought and erratic rain	Karamoja crop losses of 50% to 70%; dry spells cut coffee yields about 10%	Karamoja households; coffee farmers in central and south-west	FEWS NET [S22, S6]

Risk	Evidence	Who is most exposed	Source
Floods and excess rain	SOND 2026 forecast near-normal to above-normal, about 25% above average in most areas	Low-lying farms, highland areas prone to landslides, post-harvest storage	MWE via Daily Monitor [S25]
Livestock disease	Foot and mouth disease restrictions reduced milk and livestock incomes	Cattle corridor, dairy farmers and traders	FEWS NET [S6]
Global price falls	Coffee price per kg fell year on year; FEWS NET reported a 14.5% fall	Coffee farmers, traders and exporters	MoFPED [S30, S7]; FEWS NET [S6]
Exchange rate and energy prices	Shilling depreciation of 4% to 5% from late August; petrol about Shs6,529 per litre	Importers of inputs; transport-intensive chains	FEWS NET [S6]; Bank of Uganda [S8]
Interest rates	CBR raised to 12%; lending rates already 18.73% in February	Traders, aggregators, processors	Bank of Uganda [S8]; MoFPED [S15]
Market access rules	EUDR obligations from 30 December 2026	Coffee and cocoa exporters and their suppliers	Hogan Lovells [S16]
Public health	IMF listed an Ebola outbreak among risks	Trade, tourism, food markets	IMF [S26]

12. Outlook for 2026/27

We present three scenarios to June 2027. They are Tsavone's structured judgements based on the evidence above, not forecasts with probabilities.

Scenario	What it looks like	Signals to watch
A. Slower growth under tighter money (central)	Agriculture keeps growing but below the 6.5% of 2025/26. Coffee earnings fall year on year on lower prices and drought-affected volumes. Food inflation rises through the first half of 2027 in line with the Bank of Uganda's projection. Karamoja and refugee settlements stay in Crisis. The second season is near or above average where rain does not cause losses.	Monthly coffee export reports; UBOS food crop inflation; FEWS NET updates; second-season harvest assessments; Bank of Uganda statements.
B. Compound shock (downside)	Floods damage the second season and stored grain; coffee prices fall further; the shilling weakens; EUDR due diligence delays EU shipments in early 2027; food prices rise sharply and the IPC projection of 4.4 million is exceeded.	Food crop inflation above 10%; coffee monthly earnings below US$150 million for several months; flood damage reports; buyer notices on EUDR.
C. Good second season and stable money (upside)	Above-normal rains deliver a strong second season; food prices ease from December; the shilling stabilises and rates stop rising; exporters with mapped supply chains gain EU market share.	Falling food crop inflation from December; maize and bean prices below last year; stable exchange rate; EUDR-compliant shipments reported.

12.1 Key judgements

- Coffee: lower earnings than 2025/26, with a widening gap between exporters who can show EUDR due diligence and those who cannot.
- Food prices: higher than in 2025/26, in line with the Bank of Uganda's projection of 7.0% to 7.5% headline inflation [S8].
- Food security: Crisis outcomes in Karamoja and settlements to at least January 2027 [S6]; the February to June 2027 lean season is the main risk period [S10].
- Public programmes: PDM and agro-industrialisation spending continue, but tighter fiscal and monetary conditions limit new commitments.
- Credit: lending rates rise and credit to agriculture stays weak.

We will test each judgement against outturn data in the second edition and publish what we got wrong.

13. Implications for decision-makers

13.1 Government (MAAIF, MoFPED, local governments)

- Report PDM and agro-industrialisation results in farmer outcomes: yields, sales, prices received and incomes, by district and sex.
- Fund the remaining EUDR compliance costs for coffee before 30 December 2026, including traceability through hullers and exporters.
- Prepare for floods and post-harvest losses in the second season: drying and storage advice, aflatoxin control, and road access to markets.
- Protect Karamoja through the lean season with a costed response, and invest in water, livestock health and drought-tolerant crops.

13.2 Development partners

- Prioritise investments that link production to markets and resilience: storage, quality, irrigation (where the GRF stocktaking found less than 1% of target smallholders reached in refugee-hosting areas [S36]), livestock disease control and climate information.
- Support a public, regular series on farm-gate prices, yields and incomes. Its absence weakens every programme evaluation in the sector.
- Use blended finance to lower the cost of working capital for aggregators and processors as interest rates rise.

13.3 Lenders and investors

- Expect higher credit risk in coffee trading in 2026/27 as prices fall; stress-test borrowers' margins and stock positions.
- Look for opportunities in storage, drying, feed and processing, where higher price volatility increases the value of good infrastructure.
- Ask borrowers for EUDR and environmental and social compliance evidence; see Tsavone's Ground Truth brief on lender safeguards (www.tsavone.com/insights).

13.4 Exporters and processors

- Complete plot mapping and lot traceability for every EU-bound supply chain before December 2026.

- Diversify markets for coffee and food exports; regional demand is shifting from Kenya towards the DRC and South Sudan [S32].
- Invest in quality to capture premiums when prices fall.

13.5 Farmer organisations and cooperatives

- Use collective marketing and storage to avoid selling at harvest lows.
- Ensure members are registered and mapped for coffee traceability.
- Prepare members for higher input and transport costs and for flood risks in the second season. Tsavone's cooperative assessment tools can help organisations check their readiness.

14. Evidence gaps and what Tsavone will measure

Indicator	Why it matters	Current public data	What Tsavone will do
Farm-gate prices by crop and region	Farmer income and market efficiency	No regular public series found; FEWS NET covers selected markets	Compile from published market reports; propose a partner-led price panel
Yields of main food crops	Productivity and food availability	Annual Agricultural Survey results are dated	Report the latest UBOS agricultural survey results on release
Farm household incomes	Whether growth reaches farmers	UNHS 2023/24 has consumption, not farm income	Review UNHS agricultural module outputs
Agricultural exports by commodity, annual	Sector earnings beyond coffee	Monthly MoFPED and Bank of Uganda tables not compiled here	Publish a standard annual table in edition two
Credit to agriculture (share and rate)	Access to finance	Bank of Uganda sectoral data not compiled here	Report sectoral credit share and rates
PDM outcomes	Value for money of the largest programme	Disbursement data; few outcome studies	Review published evaluations and audit reports
EUDR readiness of coffee exports	Market access risk	2025 mapping figures; no public share of EU-bound volume compliant	Track official and industry updates through 2027
Post-harvest losses	Food availability and safety	No recent national estimate found	Review studies; propose measurement in partner assignments

15. Methods note

15.1 Approach

This Outlook is a structured desk review of public data. We searched official and multilateral sources first: UBOS, the Bank of Uganda, MoFPED, MAAIF, FEWS NET, FAO GIEWS, IPC releases, the IMF and the World Bank. Where official releases were not available in full text online, we used reputable national and international media reports of those releases and cited the media source.

15.2 Rules applied

1. Every figure states its source and period in the text and is listed in the Sources section with a web address.
2. Figures are reported as published. Tsavone calculations are labelled.
3. Where sources disagree, we report both values and explain the difference where we can.
4. Where a figure is an official's statement or comes from a media report of an official release, we say so.
5. Where no reliable figure exists, we describe the gap rather than estimate it.
6. Scenarios are Tsavone's judgements and are labelled as such.

15.3 Limitations

- Several primary documents were available only as downloadable files that we could not read in full; we relied on summary pages and media reports of those documents.
- Coffee figures are reported on different bases (coffee year, financial year, rolling twelve months, single months); we state the period for each.
- Monthly export data are preliminary and are revised.
- The data cut-off is 29 October 2026.

15.4 Quality assurance and independence

This Outlook was prepared under Tsavone's quality assurance standards, with a source check of every figure. It was prepared without client funding. Corrections will be published on www.tsavone.com and logged in the next edition. Comments are welcome at info@tsavone.com.

16. Related publications

Publication	Relevance	Where to find it
Agrifood Practice Prospectus	Tsavone's agrifood services	www.tsavone.com/publications
Uganda Refugee Economy Outlook	Companion outlook on refugee-hosting areas	www.tsavone.com/publications
Tsavone's Ground Truth briefs	Briefs on EUDR readiness and lender safeguards	www.tsavone.com/insights

Detailed method guides are shared with clients on request. More at www.tsavone.com.

17. Sources

All web addresses were accessed between 27 and 31 October 2026. Reference numbers in square brackets in the text, for example [S6], refer to this list.

Ref	Source	Web address
S1	Daily Monitor (2026). Services lead economy as industry drives expansion (reporting UBOS preliminary GDP estimates for 2025/26).	https://www.monitor.co.ug/uganda/business/markets/services-lead-economy-as-industry-drives-expansion-5485904

Ref	Source	Web address
S2	UBOS (2026). Preliminary Annual Gross Domestic Product 2025/26.	https://www.ubos.org/preliminary-annual-gross-domestic-product-2025-26/
S3	Food Business Middle East and Africa (24 October 2025). Uganda's coffee output to rise 14.8% in 2025/26 season on expanding acreage, strong yields (reporting MAAIF via Reuters).	https://www.foodbusinessmea.com/ugandas-coffee-output-to-rise-14-8-in-2025-26-season-on-expanding-acreage-strong-yields/
S4	CMB News (7 May 2026). Uganda coffee exports grow in volume but face revenue squeeze.	https://commodity-board.com/uganda-coffee-exports-grow-in-volume-but-face-revenue-squeeze
S5	Arab News (2026). Uganda August coffee shipments down 14 percent on drought (reporting MAAIF via Reuters).	https://www.arabnews.pk/business/uganda-august-coffee-shipments-down-14-percent-on-drought-3004272
S6	FEWS NET (2026). Uganda Key Message Update, September 2026 to January 2027.	https://fews.net/east-africa/uganda
S7	Daily Monitor (21 September 2026). Uganda's export revenues surge to $1.4b as gold gains offset coffee slump (reporting MoFPED Performance of the Economy, August 2026).	https://www.monitor.co.ug/uganda/news/national/uganda-s-export-revenues-surge-to-1-4b-as-gold-gains-offset-coffee-slump-5603352
S8	Nairametrics (14 October 2026). Bank of Uganda raises benchmark interest rate to 12% amid currency, inflation pressures.	https://nairametrics.com/2026/10/14/bank-of-uganda-raises-benchmark-interest-rate-to-12-amid-currency-inflation-pressures/
S9	Trading Economics (2026). Uganda inflation rate, September 2026 (citing UBOS).	https://tradingeconomics.com/uganda/inflation-cpi
S10	Nile Post via AllAfrica (26 October 2026). 3.6 million Ugandans face acute food insecurity as crisis threatens to worsen.	https://allafrica.com/stories/202610270101.html
S11	Daily Monitor (26 October 2026). Food insecurity hits Uganda as government, UN appeal for urgent action.	https://www.monitor.co.ug/uganda/news/national/food-insecurity-hits-uganda-as-government-un-appeal-for-urgent-action-5646392
S12	Daily Monitor (4 August 2026). 470,000 Karamoja locals face acute food insecurity: report.	https://www.monitor.co.ug/uganda/news/national/470-000-karamoja-locals-face-acute-food-insecurity-report-5546108
S13	Xinhua via The Star (10 July 2026). Uganda reports 16 deaths linked to drought-induced food shortages.	https://www.thestar.com.my/news/world/2026/07/10/uganda-reports-16-deaths-linked-to-drought-induced-food-shortages
S14	KPMG (2026). Uganda Budget Brief 2026.	https://assets.kpmg.com/content/dam/kpmgsites/ke/pdf/thought_leaderships/tax/2026/Uganda-Budget-Brief-2026.pdf
S15	Eagle Online (23 April 2026). Uganda's shilling lending rates rise to 18.73% in February 2026 (reporting MoFPED Performance of the Economy, March 2026).	https://eagle.co.ug/2026/04/23/ugandas-shilling-lending-rates-rise-to-18-73-in-february-2026/

Ref	Source	Web address
S16	Hogan Lovells (15 May 2026). EU Deforestation Regulation: Commission publishes simplification package ahead of December 2026.	https://www.hoganlovells.com/en/publications/eu-deforestation-regulation-commission-publishes-simplification-package-ahead-of-december-2026
S17	AHK Eastern Africa (undated). Uganda's coffee sector pushes toward EUDR compliance amid funding gaps and digital advances.	https://kenia.ahk.de/en/across-eastern-africa/uganda/uganda-s-coffee-sector-pushes-toward-eudr-compliance-amid-funding-gaps-and-digital-advances
S18	UBOS (2022). National Labour Force Survey 2021: Key Findings.	https://www.ubos.org/wp-content/uploads/2022/11/National_Labour_Force_Survey_NLFS_2021_Key_Findings.pdf
S19	Daily Monitor (16 May 2025). Uganda's poverty rate falls but Karamoja crisis deepens (reporting UBOS UNHS 2023/24).	https://www.monitor.co.ug/uganda/news/national/uganda-s-poverty-rate-falls-but-karamoja-crisis-deepens-5043470
S20	MAAIF (2026). Abstract Facts Sheet: Fisheries, 31 January 2026.	https://agriculture.go.ug/wp-content/uploads/2026/04/MAAIF-Abstract-Facts-sheet-Fisheries-31.01.2026.pdf
S21	UBOS (2024). National Population and Housing Census 2024: Final Report, Volume I (Main).	https://www.ubos.org/uganda-bureau-of-statistics-2024-the-national-population-and-housing-census-2024-final-report-volume-i-main/
S22	FEWS NET (2026). Uganda Food Security Outlook, June 2026 to January 2027.	https://fews.net/east-africa/uganda/food-security-outlook/june-2026
S23	FAO GIEWS (8 May 2026). GIEWS Country Brief: Uganda.	https://cb.apps.fao.org/country.jsp?code=UGA
S24	Nile Post via AllAfrica (20 July 2026). Uganda: Government launches emergency food relief for Karamoja (reporting the Office of the Prime Minister).	https://allafrica.com/stories/202607210811.html
S25	Daily Monitor (31 August 2026). How different regions will be affected by El Nino rains in Uganda (reporting the Ministry of Water and Environment seasonal outlook).	https://www.monitor.co.ug/uganda/news/national/how-different-regions-will-be-affected-by-el-ni%C3%B1o-rains-in-uganda-5577882
S26	IMF (28 July 2026). IMF Executive Board concludes 2026 Article IV consultation with Uganda. Press Release 26/265.	https://www.imf.org/en/news/articles/2026/07/28/pr26265-uganda-imf-concludes-2026-aiv-consultation
S27	FEWS NET via ReliefWeb (2026). Uganda Key Message Update, March to September 2026.	https://reliefweb.int/report/uganda/uganda-key-message-update-high-need-exists-among-large-and-still-growing-refugee-population-march-september-2026
S28	Daily Monitor (2026). Regional demand, local strain: Kenya's maize rush triggers price hikes in Uganda.	https://www.monitor.co.ug/uganda/business/markets/regional-demand-local-strain-kenya-s-maize-rush-triggers-price-hikes-in-uganda-5581932

Ref	Source	Web address
S29	Nile Post via AllAfrica (2 June 2026). Uganda's exports soar to record $10.2bn as coffee and gold drive growth.	https://allafrica.com/stories/202606030452.html
S30	Eagle Online (19 June 2026). Uganda's exports rise 24.3% as coffee earnings decline (reporting MoFPED Performance of the Economy).	https://eagle.co.ug/2026/06/19/ugandas-exports-rise-24-3-as-coffee-earnings-decline/
S31	Africanews (6 July 2026). Uganda coffee exports hit by weaker prices (reporting MAAIF).	https://www.africanews.com/2026/07/06/uganda-coffee-exports-hit-by-weaker-prices/
S32	Daily Monitor (20 August 2026). DRC, South Sudan overtake Kenya as Uganda's top export markets (reporting Bank of Uganda data).	https://www.monitor.co.ug/uganda/news/national/drc-south-sudan-overtake-kenya-as-uganda-s-top-export-markets-5565154
S33	Food Business Middle East and Africa (2026). Uganda gains EU approval for farmed fish exports.	https://www.foodbusinessmea.com/uganda-gains-eu-approval-for-farmed-fish-exports/
S34	Eagle Online (11 June 2026). 2026 budget: govt allocates Shs4.4t to PDM as four million households set to benefit.	https://eagle.co.ug/2026/06/11/2026-budget-govt-allocates-shs4-4t-to-pdm-as-four-million-households-set-to-benefit/
S35	CMS (2025). The EUDR benchmarking list is here, and comes as a surprise.	https://cms.law/en/int/publication/european-union-deforestation-regulation/the-eudr-benchmarking-list-is-here-and-comes-as-a-surprise
S36	Global Compact on Refugees (2025). Uganda GRF pledges: Outcomes Report of the National Stocktaking Event, 16 December 2025.	https://globalcompactrefugees.org/sites/default/files/2026-05/Outcomes%20Report_National%20Stocktaking%20Event_16-12-25.pdf
S37	Tracextech (undated). What every Uganda coffee supply chain actor needs to prepare for EUDR.	https://tracextech.com/uganda-coffee-supply-chain/
S38	The Independent via AllAfrica (27 October 2026). PM Nabbanja calls for broader El Nino response as Uganda, UN launch $61 million appeal.	https://allafrica.com/stories/202610270356.html

Annex A: Definitions

Term	Definition used in this Outlook
Agriculture (GDP)	UBOS activity group 'agriculture, forestry and fishing', comprising cash crops, food crops, livestock, forestry and fishing.
Headline inflation	Annual change in the UBOS consumer price index.
Core inflation	Headline inflation excluding food crops, fuel, electricity and metered water, as defined by UBOS and used by the Bank of Uganda as its target measure.
Food crop inflation	Annual change in the UBOS index for food crops and related items, a volatile sub-index.
Bimodal and unimodal areas	Areas with two rainy seasons a year (most of Uganda) and one long rainy season (Karamoja).
IPC Phase 3 (Crisis)	Households with food consumption gaps or able to meet minimum food needs only by depleting essential livelihood assets or using crisis coping strategies.
Bag (coffee)	A 60-kg bag of green coffee, the standard export unit.
EUDR	Regulation (EU) 2023/1115 on deforestation-free products, as amended.
Standard risk (EUDR)	Countries not classified as low or high risk in the Commission's benchmarking, to which standard due diligence applies.

Annex B: Agrifood calendar for 2026/27

Period	Farming calendar (typical)	Data releases to watch
Oct to Dec 2026	Second-season growth and early harvest in bimodal areas; Karamoja post-harvest; heavy rains forecast	Monthly CPI (UBOS); coffee export reports (MAAIF); FEWS NET updates; Bank of Uganda MPS
30 Dec 2026	EUDR obligations begin for large and medium operators	EU guidance and benchmarking updates
Jan to Feb 2027	Second-season harvest and sales; land preparation	IPC update; Performance of the Economy reports (MoFPED)
Mar to Jun 2027	First-season planting and growth; lean season in many areas; Karamoja planting from about April	March to May seasonal forecasts; FEWS NET outlook; IPC projection period
Jun 2027	First-season harvest begins	UBOS preliminary GDP 2026/27; national budget 2027/28
30 Jun 2027	EUDR obligations begin for micro and small operators outside timber	EU guidance

TSAVONE
CONSULTING

Trusted evidence from the field.

Tsavone Consulting is a Ugandan consulting firm built around one capability: trusted field evidence. We reach the people and places a decision is about, collect data to a known quality, say what it shows and how sure we are, and give clients something they can act on.

Our methods work across sectors, with depth in agrifood, nature, climate and energy, youth skills and jobs, and humanitarian and displacement research. Rooted in Uganda, working worldwide.

KAMPALA Martyrs Way, Ntinda · **GULU CITY** Patiko Road, Laroo-Pece Division
P.O. Box 16113, Wandegeya, Kampala, Uganda
info@tsavone.com · www.tsavone.com

TSV-PUB-007

© 2026 Tsavone Consulting Ltd