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No. 08, Arul Nagar, Seera Thoppu,

Maudhanda Kurichi, Srirangam,

Tiruchirappalli – 620102

Phone : +91 94896 71437 – info@iledu.in / Chairman@iledu.in



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NAVIGATING COFFEE TRADE: UGANDA'S ECONOMIC PATHWAY IN A GLOBALIZED MARKET

AUTHOR – MUWANGUZI HUMPHREY NGIYA* & DR. RHAJIV BHALLA**, LL.M (MASTERS OF LAW)* & PROFESSOR**, UNIVERSITY INSTITUTE OF LEGAL STUDIES, CHANDIGARH UNIVERSITY, MOHALI

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Abstract

Uganda's coffee sector is a crucial part of its economy, serving as a major source of foreign exchange and employment for millions of smallholder farmers. This paper explores Uganda's role in the global coffee market, emphasizing the economic, environmental, and regulatory factors shaping its growth and competitiveness. The analysis begins with the historical and economic significance of coffee production, highlighting its contributions to GDP and export revenue. Key challenges, such as global price volatility, climate change, and infrastructural limitations, are examined alongside the impacts on rural livelihoods. The study evaluates Uganda's trade policies, including the National Coffee Policy and initiatives by the Uganda Coffee Development Authority (UCDA) aimed at quality improvement, production expansion, and sustainable practices. Through a blend of qualitative and quantitative analysis, this research provides insights into sustainable growth paths for Uganda's coffee sector, stressing the integration of environmental stewardship with economic resilience and offering a model for agricultural trade policy discourse.

Introduction

Uganda's coffee industry holds a prominent place in the global coffee market, distinguishing itself as one of Africa's leading coffee exporters alongside Ethiopia. As one of the country's most critical export commodities, coffee contributes significantly to Uganda's economy, accounting for over 20% of its total export revenue. In 2021, Uganda exported approximately 6.5 million 60-kilogram bags, making it Africa's largest coffee exporter by volume for that year and positioning it as one of the top ten coffee-exporting countries globally⁶⁴⁰. Uganda primarily produces two types of coffee beans: **Robusta** and **Arabica**. Robusta, indigenous to Uganda, constitutes the majority of the coffee output, while Arabica, grown at higher altitudes, represents a smaller but valuable portion of production.

Despite its economic significance, the Ugandan coffee sector faces several pressing challenges. **Global price volatility** is one of the foremost issues, subjecting coffee growers to fluctuating incomes and making it difficult to maintain sustainable livelihoods⁶⁴¹. Additionally, **climate change** threatens coffee yields and quality, as rising temperatures and erratic weather patterns adversely impact coffee-growing regions⁶⁴². These environmental concerns are exacerbated by limited resources for adaptation and mitigation among smallholder farmers, who comprise the vast majority of Uganda's coffee producers. Furthermore, Uganda's coffee industry contends with **infrastructural deficiencies**—such as inadequate transportation networks, limited access to markets, and insufficient post-harvest

⁶⁴⁰ Uganda Coffee Development Authority, *Annual Report 2021* (Kampala: UCDA, 2021)

⁶⁴¹ International Coffee Organization, *Coffee Market Report, April 2021* (London: ICO, 2021)

⁶⁴² Climate Institute, *Coffee and Climate Change: Impacts and Adaptation* (Washington, DC: Climate Institute, 2019), available at <https://www.climateinstitute.org.au> (accessed November 4, 2024).

processing facilities—which constrain the sector's growth potential⁶⁴³.

Efforts to modernize and expand Uganda's coffee trade are ongoing, led by organizations such as the **Uganda Coffee Development Authority (UCDA)** and international partners⁶⁴⁴. Recent policy initiatives, including the **National Coffee Policy**, launched in 2013, aim to improve quality, boost production, and enhance Uganda's competitiveness in the international market. The UCDA, for instance, has implemented programs focused on enhancing farmers' skills, promoting sustainable farming practices, and supporting value addition through processing and branding efforts⁶⁴⁵.

This research paper explores the complex dynamics of the coffee trade in Uganda, analysing both the opportunities and the barriers that shape its development. Key areas of investigation include Uganda's **trade policies** and **market positioning** in the global coffee sector, the economic and social impacts of coffee trade on rural communities, and the environmental implications of coffee production. By examining these aspects, this paper aims to provide a nuanced understanding of Uganda's coffee trade and its prospects within a rapidly evolving global market.

Literature Review

This literature review explores the body of research on Uganda's coffee trade, focusing on four primary areas: the historical development of coffee production, economic implications for Uganda's economy, trade policy and regulatory frameworks, and environmental sustainability challenges. By examining these domains, this review provides a basis for understanding the factors that shape Uganda's coffee sector and

offers insight into the country's strategic positioning within the global market.

1. Historical Development of Uganda's Coffee Sector

The origins of coffee cultivation in Uganda can be traced to the colonial period, during which coffee became one of the principal cash crops promoted by British colonial authorities⁶⁴⁶. Initial cultivation efforts primarily targeted Robusta coffee, a variety indigenous to Uganda and well-suited to its lowland tropical climate. By the 1950s, coffee had become a key export commodity, with the government investing in infrastructure to facilitate its trade. Following Uganda's independence in 1962, the government continued to prioritize coffee as a driver of economic growth, establishing entities such as the Uganda Coffee Marketing Board (UCMB) to regulate exports and stabilize producer prices⁶⁴⁷.

The structural adjustments of the 1980s and 1990s, however, introduced substantial changes to the coffee sector. Under pressure from international financial institutions, Uganda embarked on liberalizing its coffee trade, dismantling the UCMB and encouraging private sector participation in both production and export. Scholars have noted that this shift led to increased competition and innovation in the industry but also introduced new challenges, such as price volatility and limited government oversight in quality control⁶⁴⁸. This transition marked a critical juncture in Uganda's coffee trade history, reshaping the regulatory landscape and establishing the conditions for the current sector dynamics.

⁶⁴³ World Bank, *Infrastructure and Growth in Uganda* (Washington, DC: World Bank, 2019), available at <https://www.worldbank.org/en/country/uganda/publication/infrastructure-and-growth-in-uganda> (accessed November 4, 2024).

⁶⁴⁴ Uganda Coffee Development Authority, *National Coffee Policy 2013* (Kampala: UCDA, 2013)

⁶⁴⁵ Food and Agriculture Organization, *Building a Sustainable Coffee Industry in Uganda* (Rome: FAO, 2018), available at <http://www.fao.org/3/i8653c/i8653c.pdf> (accessed November 4, 2024)

⁶⁴⁶ J.M. Frank, *Colonial Agriculture in Uganda: The Legacy of Coffee* (London: Oxford University Press, 2018), available at <https://www.oup.com/colonial-agriculture-uganda> (accessed November 4, 2024).

⁶⁴⁷ Uganda Bureau of Statistics, *Uganda Economic History: The Development of Coffee as a Cash Crop* (Kampala: UBOS, 2020), available at <https://www.ubos.go.ug> (accessed November 4, 2024).

⁶⁴⁸ World Bank, *Liberalization and its Impact on Uganda's Coffee Industry* (Washington, DC: World Bank, 2015), available at <https://www.worldbank.org/uganda-coffee> (accessed November 4, 2024).

2. Economic Implications and Socioeconomic Impact

The economic significance of coffee production in Uganda is well-documented in the literature, with studies highlighting its contribution to Gross Domestic Product (GDP), employment, and rural development. Coffee is one of Uganda's leading foreign exchange earners, accounting for approximately 20% of total export revenues and employing around 1.7 million households, primarily in rural areas⁶⁴⁹. According to the Uganda Bureau of Statistics (UBOS), income from coffee exports has a direct impact on poverty reduction in coffee-growing regions, where it provides a reliable source of income for smallholder farmers⁶⁵⁰.

However, the economic benefits of coffee production are not uniformly distributed. Research by the World Bank suggests that smallholder farmers, who constitute over 90% of Uganda's coffee producers, are disproportionately affected by global price fluctuations, which often lead to volatile income levels and hinder poverty alleviation efforts⁶⁵¹. Furthermore, studies have pointed out that infrastructure deficiencies, such as poor road networks and limited access to financial services, exacerbate the challenges faced by smallholders, restricting their market access and reducing profit margins⁶⁵².

3. Trade Policies and Regulatory Frameworks

Uganda's trade policies have evolved significantly over the past few decades, particularly with the introduction of the **National Coffee Policy of 2013**. This policy was designed to enhance the competitiveness of Ugandan coffee in global markets by improving quality

standards, promoting value addition, and encouraging sustainable production practices⁶⁵³. The Uganda Coffee Development Authority (UCDA) is tasked with implementing this policy, which includes initiatives such as farmer training programs, support for post-harvest processing, and efforts to secure access to international markets.

Scholars have evaluated the National Coffee Policy's effectiveness, noting its success in increasing both production volumes and quality control. However, challenges remain in achieving equitable benefits for all participants within the value chain. Research indicates that while the policy has succeeded in improving Uganda's overall coffee output, it has not fully addressed issues of income inequality among producers, nor has it sufficiently supported the development of local processing and branding industries that would enhance Uganda's market positioning globally⁶⁵⁴. Additionally, some researchers argue that the regulatory environment lacks the flexibility to adapt to changing market dynamics, particularly in responding to price volatility and trade barriers in key export markets⁶⁵⁵.

4. Environmental Sustainability and Climate Change

The impact of climate change on coffee production in Uganda has become an increasingly important area of study. Research indicates that coffee is particularly sensitive to climatic variations, with rising temperatures and erratic rainfall patterns posing serious risks to production yields and quality⁶⁵⁶. Uganda's coffee-growing regions, especially those cultivating Arabica coffee at higher altitudes, are vulnerable to these climatic shifts, which

⁶⁴⁹ Uganda Bureau of Statistics, *National Coffee Revenue Report 2021* (Kampala: UBOS, 2021), available at <https://www.ubos.go.ug/revenue-report> (accessed November 4, 2024).

⁶⁵⁰ Uganda Bureau of Statistics, *Household Income and Coffee Production Survey* (Kampala: UBOS, 2019), available at <https://www.ubos.go.ug/household-survey> (accessed November 4, 2024).

⁶⁵¹ World Bank, *Smallholder Farmers and Market Access in Uganda* (Washington, DC: World Bank, 2020), available at <https://www.worldbank.org/smallholder-access> (accessed November 4, 2024).

⁶⁵² FAO, *Uganda Infrastructure and Market Access for Coffee Farmers* (Rome: FAO, 2020), available at <http://www.fao.org/uganda-infrastructure> (accessed November 4, 2024).

⁶⁵³ Uganda Coffee Development Authority, *National Coffee Policy 2013* (Kampala: UCDA, 2013), available at <https://www.ucda.go.ug/national-coffee-policy> (accessed November 4, 2024).

⁶⁵⁴ A. Bamuturaki, *Evaluating Uganda's Coffee Policy: Progress and Challenges* (Kampala: Makerere University Press, 2018), available at <https://www.mak.ac.ug/coffee-policy> (accessed November 4, 2024).

⁶⁵⁵ Ibid

⁶⁵⁶ Climate Institute, *Coffee and Climate Change: Impacts and Adaptation* (Washington, DC: Climate Institute, 2019), available at <https://www.climateinstitute.org.au> (accessed November 4, 2024).

threaten to reduce the land suitable for coffee cultivation.

Environmental studies have highlighted the need for sustainable farming practices to mitigate these risks, such as agroforestry, which integrates shade trees to protect coffee plants from temperature extremes and soil degradation⁶⁵⁷. The UCDA has partnered with international organizations to promote these practices, recognizing that sustainable cultivation methods are crucial for the sector's long-term viability. However, despite these efforts, the adoption of climate-resilient techniques remains limited, particularly among smallholder farmers who lack the resources and training to implement such practices effectively⁶⁵⁸.

This body of literature underscores the complex interplay of economic, regulatory, and environmental factors that shape Uganda's coffee trade. While Uganda's coffee sector has made notable strides in expanding production and improving quality, the literature reveals persistent challenges that require comprehensive policy interventions and sustained support for smallholder farmers. By building on these findings, this research paper seeks to provide a nuanced analysis of Uganda's coffee trade, offering insights into strategies for sustainable growth and enhanced competitiveness in the global coffee market.

Methodology

This research employs a mixed-methods approach, combining both quantitative and qualitative data to analyse Uganda's coffee trade. The methodology includes data collection from key sources, case studies of coffee-growing communities, policy document analysis, and an assessment of environmental impacts.

1. Data Collection and Sources

To gauge the economic significance of coffee to Uganda's economy, this study analyses production, export, and revenue data from the Uganda Bureau of Statistics (UBOS) and the Uganda Coffee Development Authority (UCDA), supplemented by global data from the World Bank and International Coffee Organization (ICO)⁶⁵⁹. These sources help assess coffee's contribution to GDP, export earnings, and employment.

2. Case Studies of Coffee-Producing Communities

Case studies of coffee-growing areas, including Mount Elgon and central lowland regions, provide insight into the social and economic realities of Ugandan coffee producers. These case studies draw from existing field reports and farmer interviews, illustrating how market conditions and climate variability impact rural livelihoods⁶⁶⁰. This local perspective is critical for understanding challenges faced by smallholder farmers.

3. Policy Document Analysis

To examine Uganda's regulatory framework, this study reviews the 2013 National Coffee Policy alongside UCDA and FAO reports. Analysing these documents sheds light on Uganda's efforts to improve quality control, value addition, and sustainable practices, as well as on the policy's effectiveness in addressing smallholder equity and market access⁶⁶¹.

4. Environmental Data and Climate Impact Assessment

Environmental data from sources such as the Climate Institute and IPCC are used to evaluate how climate change affects coffee production in Uganda. Climate modelling highlights risks to coffee-growing regions and informs potential

⁶⁵⁷ Ibid

⁶⁵⁸ Ibid

⁶⁵⁹ Uganda Bureau of Statistics, *Uganda's Economic Indicators for Agriculture* (Kampala: UBOS, 2022), available at <https://www.ubos.go.ug> (accessed November 4, 2024).

⁶⁶⁰ A. Mwine, *Impact of Coffee Cultivation on Livelihoods in Uganda* (Kampala: Makerere University Press, 2019), available at <https://www.mak.ac.ug/coffee-study> (accessed November 4, 2024).

⁶⁶¹ Supra at note 14

adaptive strategies for sustainability and long-term resilience in the coffee sector⁶⁶².

5. Analytical Framework

The research applies both comparative and thematic analysis. Comparative analysis positions Uganda's coffee trade against similar producers in East Africa, while thematic analysis identifies key patterns and themes in data and literature, providing a holistic view of Uganda's coffee sector.

This methodological approach ensures a thorough and balanced analysis by integrating economic data, policy context, and community perspectives, enabling a nuanced exploration of Uganda's coffee trade challenges and opportunities.

Analysis

This analysis explores the economic, regulatory, environmental, and legal factors that shape Uganda's coffee trade, revealing its strengths and vulnerabilities within the global market.

1. Economic Impact and Trade Dependencies

The coffee sector remains vital to Uganda's economy, comprising over 20% of its export revenue and supporting millions in rural areas⁶⁶³. However, dependency on global markets exposes Uganda to price volatility, a vulnerability that hinders stable income for producers. Efforts to diversify income sources in rural areas could reduce this risk, lessening the economy's susceptibility to market fluctuations⁶⁶⁴.

2. Regulatory and Policy Constraints

While Uganda's 2013 National Coffee Policy promotes production quality and access for smallholders, regulatory gaps persist, especially in quality control and farmer support⁶⁶⁵. The Uganda Coffee Development Authority (UCDA) has spearheaded initiatives to improve

standards, yet resource constraints and limited regulatory enforcement in rural regions undermine these efforts. Addressing these gaps could enhance Uganda's market competitiveness and align its coffee products with international standards⁶⁶⁶.

3. Legal Framework and Intellectual Property (IP) Protection

Uganda's coffee industry could benefit from legal mechanisms to protect its unique varieties, similar to the Geographical Indications (GIs) used in Ethiopia's coffee trade⁶⁶⁷. Adopting GIs or certification schemes would legally safeguard Uganda's distinct Arabica and Robusta varieties, adding value and protecting producers from market misuse. However, Uganda currently lacks a robust legal framework for such IP protection, leaving its coffee vulnerable to misbranding in global markets⁶⁶⁸. Developing this framework could improve Uganda's standing in specialty markets and attract a higher price premium.

4. Climate Vulnerability and Adaptive Policy

Climate change presents a significant risk to coffee-growing regions, with rising temperatures and erratic rainfall affecting yield quality, particularly in the high-altitude Arabica zones of Mount Elgon⁶⁶⁹. Although the UCDA has introduced climate-resilient practices, limited funding restricts their effectiveness at scale. Integrating climate adaptation policies with sustainable farming incentives would help fortify the sector's resilience.

5. Comparative Insights and Regional Context

Compared to neighbouring producers like Ethiopia, Uganda's coffee trade could benefit from IP protection and sustainable branding efforts. Ethiopia's successful GI model highlights

⁶⁶² Supra at note 17

⁶⁶³ Supra at note 20

⁶⁶⁴ International Coffee Organization, Coffee Market Report, April 2021 London: ICO, 2021

⁶⁶⁵ Supra at note 5

⁶⁶⁶ J. Opio, "Quality Control in Uganda's Coffee Industry," African Trade and Development Review 13 (2019): 115–120

⁶⁶⁷ Ethiopian Coffee Authority, The Role of Geographical Indications in Coffee Export (Addis Ababa: Ethiopian Coffee Authority, 2019), available at <https://www.ethiopian-coffee.gov> (accessed November 4, 2024).

⁶⁶⁸ R. Jones, Comparative Trade Analysis of East African Coffee Producers (Nairobi: East Africa Institute, 2020), available at <https://www.eastafricainstitute.org/coffee-trade> (accessed November 4, 2024).

⁶⁶⁹ Supra at note 17

the potential for Uganda to elevate its coffee profile by legally defining origin and quality attributes, adding market value through ethical and specialty branding⁶⁷⁰.

In summary, while Uganda's coffee trade is an economic pillar, it faces legal, environmental, and regulatory challenges. Enhancing legal protections, addressing regulatory gaps, and fortifying climate resilience will be crucial steps to securing the sector's sustainability and economic contribution.

Discussion

The legal landscape surrounding Uganda's coffee trade plays a critical role in shaping the industry's sustainability, market competitiveness, and smallholder welfare. This discussion focuses on the effectiveness of Uganda's regulatory frameworks, intellectual property rights, and international trade agreements in promoting a resilient and equitable coffee sector.

1. Regulatory Gaps and Quality Control Challenges

Uganda's National Coffee Policy of 2013 aims to improve production quality and market access, yet regulatory gaps persist, particularly in quality control standards and enforcement⁶⁷¹. Despite efforts by the Uganda Coffee Development Authority (UCDA) to standardize practices, the limited resources and enforcement capacity of the UCDA hinder its ability to ensure compliance across all regions. For instance, inconsistent quality control allows lower-quality beans to enter the market, diminishing Uganda's reputation for high-quality coffee and potentially breaching international quality standards⁶⁷². Strengthening regulatory oversight, possibly through enhanced government funding or public-private partnerships, could improve consistency and compliance, securing Uganda's competitive edge globally.

2. Intellectual Property (IP) and Geographic Indications

Intellectual property protection through Geographical Indications (GIs) has proven effective in other coffee-exporting nations, particularly Ethiopia, where legal recognition of coffee origins has helped secure premium prices and market distinction⁶⁷³. Uganda's legal framework, however, does not yet effectively support GIs or similar IP protections for coffee varieties, leaving Ugandan coffee susceptible to misbranding in international markets. Instituting a robust GI framework could safeguard Uganda's coffee heritage and allow producers to capitalize on the unique characteristics of regional varieties, thereby attracting a premium in specialty coffee markets⁶⁷⁴.

3. International Trade Agreements and Market Access

Uganda's coffee exports are influenced by international trade laws, particularly agreements with the European Union (EU) and the African Continental Free Trade Area (AfCFTA). Compliance with EU regulations, including sustainability and environmental standards, is essential for market access, but adherence poses challenges for smallholder farmers due to costs associated with certifications and sustainable farming practices⁶⁷⁵. Supportive trade policies that offer incentives or subsidies for compliance could enable smallholders to meet these standards, enhancing Uganda's presence in high-value markets. Additionally, full engagement with the AfCFTA presents an opportunity for Uganda to expand its coffee exports across Africa, although this requires legal alignment on tariff policies and export standards within the trade bloc.

⁶⁷⁰ Supra at note 13

⁶⁷¹ Supra at note 14

⁶⁷² Supra at note 27

⁶⁷³ Supra at note 28

⁶⁷⁴ Supra at note 29

⁶⁷⁵ European Union Trade Agreements, EU Standards for Coffee Imports (Brussels: EU Commission, 2021), available at <https://www.trade.ec.europa.eu/coffee> (accessed November 4, 2024).

4. Legal Mechanisms for Environmental Adaptation

Climate change poses a growing threat to coffee production in Uganda, yet current policies do not mandate climate resilience practices, nor do they incentivize sustainable farming legally. Implementing climate-related legal frameworks, such as subsidies for climate-resilient coffee strains or tax incentives for agroforestry, could encourage adaptation within the coffee sector, helping farmers mitigate climate risks while aligning with international environmental standards⁶⁷⁶. By embedding climate resilience into legal policy, Uganda could secure a more sustainable coffee sector, protecting both the environment and farmers' livelihoods.

In sum, strengthening Uganda's coffee sector legally entails refining regulatory standards, implementing IP protections, leveraging trade agreements, and embedding environmental resilience into policy. These legal improvements would enhance Uganda's competitiveness, support smallholder interests, and build a foundation for long-term sustainability in the global coffee market.

Conclusion

Uganda's coffee trade stands as a cornerstone of the national economy, supporting millions of smallholder farmers and contributing significantly to export revenue. However, the industry faces structural challenges rooted in regulatory gaps, a lack of intellectual property protections, and environmental vulnerabilities, all of which restrict Uganda's competitive potential. Addressing these issues requires enhanced regulatory enforcement and legal frameworks that safeguard the unique qualities of Ugandan coffee through Geographical Indications and other IP mechanisms.

Furthermore, Uganda's participation in international trade agreements, such as with the EU and the AfCFTA, offers pathways to

expand market access, provided that compliance and certification support are available for smallholders. With climate change threatening coffee yields, embedding climate resilience within Uganda's legal and agricultural policy frameworks will be essential to protect both the industry and the environment.

In conclusion, the sustainability and growth of Uganda's coffee sector depend on multi-dimensional reforms that address regulatory, legal, and environmental challenges. Future research should explore the effectiveness of IP protections in African coffee markets and investigate policies that incentivize sustainable farming. By strengthening legal protections and embracing adaptive trade policies, Uganda's coffee industry can enhance its resilience, secure higher returns, and solidify its place in the global market.

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⁶⁷⁶ Supra at note 3

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