Republic of Uganda

UGANDA
AVOCADO ROADMAP
2025-2028




The Uganda Avocado Roadmap was developed on the basis of the process, methodology and technical assistance of the International Trade Centre (ITC) within the framework of its Trade Development Strategy programme.

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International Trade Centre

UGANDA AVOCADO SECTOR ROADMAP 2025-2028

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"A vibrant, export-driven Ugandan avocado sector supporting farmers and creating jobs"

FOREWORD

Uganda's agricultural transformation agenda is grounded in our national commitment to drive inclusive economic growth, create employment opportunities, and enhance value addition through the commercialization of strategic commodities. The avocado sub-sector, with a particular focus on the Hass variety, has been identified as a high-potential priority under the Agro-Industrialization Programme Implementation Action Plan and the Third National Development Plan.

The Uganda Avocado Roadmap 2025–2028 presents a clear and strategic direction to develop a competitive and sustainable avocado industry.

Uganda is uniquely positioned to benefit from its favourable agro-climatic conditions, which support year-round production and provide a distinct advantage in the global supply chain. The successful export of avocados valued at 5.1 million US dollars in 2023 reflects the emerging opportunities for growth in both regional and international markets.

Despite this early progress, the sector continues to face significant challenges. These include limited access to quality and certified planting materials, inconsistent agronomic practices, inadequate irrigation infrastructure, and weak compliance with international market requirements. Furthermore, inefficiencies in post-harvest handling, storage, and logistics infrastructure are contributing to high post-harvest losses and reduced competitiveness.

This roadmap outlines strategic interventions to enhance production and productivity, improve access to high-value markets, and promote the adoption of internationally recognized certifications such as Global GAP and organic standards. It also calls for targeted investments in cold chain systems, rural infrastructure, and technical support to reduce losses and ensure a consistent supply of export-grade fruit.

The development of a robust avocado value chain requires strong coordination among all stakeholders. The roadmap emphasizes the establishment of an inclusive Avocado Sector Platform to align actions and foster partnerships among government institutions, the private sector, producer organizations, and development partners. Empowering smallholder farmers, women, and youth to actively participate in and benefit from the sector will be essential for inclusive and sustainable growth.

The Ministry of Agriculture, Animal Industry, and Fisheries reaffirms its commitment to providing policy guidance, institutional leadership, and technical oversight to facilitate the effective implementation of this roadmap. By working together, we can unlock the full potential of Uganda's avocado industry and position the country as a reliable supplier of premium quality avocados on the global stage.

Frank Tumwebaze
Minister of Agriculture, Animal Industry and Fisheries

PRIVATE SECTOR JOINT FOREWORD

The avocado value chain in Uganda offers a strong opportunity to advance inclusive economic growth, diversify exports and transform rural livelihoods through increased income generation and employment opportunities. Uganda is well-placed to meet the rising global demand for high-quality avocados, driven by increasingly health-conscious consumers. Our fertile soils, favourable climate and a growing community of dedicated producers provide a solid foundation on which to build a competitive and environmentally sustainable avocado value chain.

As representatives of the private sector and industry associations, we recognize that the path to becoming a significant player in the global avocado market requires strategic action, coordinated investment, and unwavering commitment from both public and private actors. This Roadmap lays the foundation for a competitive, export-oriented avocado value chain in Uganda, while also encouraging local culinary innovation and avocado-based product development.

The Roadmap is the result of broad-based consultations involving producers, exporters, development partners, government agencies and other value chain actors. It outlines clear priorities for upgrading production, enhancing market access, improving cold-chain infrastructure and ensuring the sustainability of our sector.

We understand that the success of the Uganda Avocado Roadmap will depend on our shared commitment to implement the actions outlined, strengthen partnerships and advocate for the enabling environment needed to support avocado sector growth, as well as to have regular public-private dialogue and support from the government. We are confident that with targeted support and effective coordination, Uganda can emerge as an important supplier of premium avocados, contributing to job creation, rural incomes and national export performance.

We stand ready to champion this Roadmap and call on all stakeholders – public and private – to join us in transforming Uganda's avocado sector into a beacon of opportunity for farmers, entrepreneurs and the nation at large.

Stephen K Kimpwedde

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Photo: ITC

ACRONYMS AND ABBREVIATIONS

Unless otherwise specified, all references to dollars ($) are to United States dollars, and all references to tons are to metric tons.

The following acronyms and abbreviations are used.

AAU	Avocado Association of Uganda
ASP	Avocado Sector Platform
AvoCoop	Uganda Avocado Farmers' Cooperative Union Ltd
CAGR	compound annual growth rate
DAES	Directorate of Agricultural Extension Services
EAC	East African Community
FAO	Food and Agriculture Organization of the United Nations
GAP	Good Agricultural Practices
HS	Harmonized System
ITC	International Trade Centre
MAAIF	Ministry of Agriculture, Animal Industry and Fisheries
MTIC	Ministry of Trade, Industry and Cooperatives
NAADS	National Agricultural Advisory Services
NAFOU	National Avocado Federation of Uganda
PACEID	Presidential Advisory Committee on Exports and Industrial Development
PoA	Plan of Action
UAE	United Arab Emirates
UFZEPA	Uganda Free Zone and Export Promotion Authority
VAT	value-added tax

Photo: ©ITC

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EXECUTIVE SUMMARY

Uganda is well-positioned to expand its avocado value chain and gain value across both regional and global markets, especially in the production of Hass avocados. Thanks to its favourable agroclimatic conditions, the country can support year-round cultivation, making it a strong contender in the global supply chain. Rising international demand for Hass avocados offers Uganda a timely opportunity to drive economic growth, generate employment and enhance livelihoods – particularly for young people.

The avocado industry has been identified as a priority under Uganda's Agro-Industrialization Programme in the National Development Plan III, reflecting its strategic importance for agricultural diversification. Although the sector is still in its early stages, with commercial production beginning in 2023, it has already made notable strides, exporting $5.1 million worth of avocados in 2023, mainly to the Middle East. However, challenges remain and need to be addressed to unlock the full potential of the sector.

The sector is hindered by limited reliable data and limited adherence to international market access requirements, including quality standards and certifications. This affects Uganda's competitiveness in both regional and international markets.

Another major issue is the inconsistency in planting materials, with unreliable seedlings and high costs; as well as insufficient research and nurseries, and limited irrigation infrastructure at farm level. Low productivity is also a concern, stemming from outdated farming practices, inadequate technical support and poor postharvest handling.

Weak supply chain coordination and high production costs further limit the sector's efficiency and competitiveness. Additionally, logistical infrastructure remains a major obstacle, with poor roads, inadequate cold chain systems and insufficient storage facilities leading to significant postharvest losses.

While Uganda may not compete on volume with global leaders, it can secure a successful niche by focusing on quality, consistency, and certifications such as Global Good Agricultural Practices (GAP) and organic. Uganda's avocado sector has the potential to evolve into a competitive and sustainable value chain that benefits farmers, the private sector and policymakers. This can be achieved by strengthening production and productivity, ensuring consistent volumes and high quality, and maintaining rigorous standards for both domestic and export markets.

Hass avocado is a perennial crop with a productive lifespan of up to 40 years, requiring a long-term investment outlook. However, many smallholder farmers in Uganda are accustomed to seasonal cropping systems and may lack the necessary information, financial tools and market assurances to support a shift towards long-cycle horticulture. To unlock the full commercial potential of Hass avocado, there is a need to align financing mechanisms, incentive structures and infrastructure development around a coherent national plan. If well-coordinated, such an approach could position Uganda to generate over $240 million annually in avocado export revenues, contributing significantly to rural transformation and economic diversification.[1]

1.– Based on stakeholder consultations.

By focusing on quality, certifications and diversifying market reach – including targeting off-peak periods such as March to May, when other avocado producers' supply is lower and European demand remains strong, as well as exploring opportunities in emerging markets like the Middle East and Asia – Uganda can overcome volume constraints and position itself as a strong player in the global avocado trade.

To achieve this, collaboration is key. The government, private sector and development partners should work together through an Avocado Sector Platform (ASP) to drive coordinated efforts. Empowering farmers, women and youth to take an active role in the sector will be crucial to fostering long-term growth and sustainability.

The following key elements have the biggest potential to support continuous export growth:

- Enhance production capacity: Improve farming techniques, increase access to quality planting materials, and provide technical support to boost productivity and ensure consistent supply.
- Strengthen market access: Support farmers in meeting international standards for quality, safety and certification to expand export opportunities.
- Develop infrastructure: Invest in cold chain systems, storage facilities and transportation to reduce postharvest losses and improve efficiency.
- Foster collaboration: Strengthen partnerships among government, the private sector and development partners to create a coordinated approach to sector development.

WAY FORWARD FOR SECTOR EXPORT DEVELOPMENT

The following vision statement, which was agreed upon by avocado value chain stakeholders in Uganda, outlines the proposed vision and strategic objectives of this three-year Roadmap.

> "A vibrant, export-driven Ugandan avocado sector supporting farmers and creating jobs"

The Plan of Action (PoA) in this Roadmap responds to this vision by comprehensively addressing the sector's constraints and leveraging opportunities. To this end, specific efforts will be made in the following strategic directions.

Strategic objective 1 Enhance production, improve productivity and promote value addition in the avocado sector	• Enhancing farming practices, improving access to quality planting materials, and providing technical support to boost yields are the key steps. Its is also crucial to develop value-added products (e.g. avocado oil) to increase profitability and market appeal.
Strategic objective 2 Strengthen the business environment for avocado sector growth	• Enhancing data collection, attracting investments to support sector growth, and improving coordination among stakeholders are essential to streamline efforts and address challenges effectively.
Strategic objective 3 Expand market access and promote Ugandan avocados to increase exports	• By improving product quality and certification, strengthening export logistics, and promoting Ugandan avocados through targeted marketing campaigns, Uganda can expand its market share and attract more buyers.

Effective implementation of the Roadmap demands strong coordinating activities between the public and private sectors, strategic resources mobilization, and the establishment of an enabling business. A fully operational and efficient public-private coordination mechanism, such as an ASP with a functional secretariat, is the key. The Government must commit additional resources from the national budget, while development partners are expected to provide targeted technical support to reinforce implementation efforts.

PART I: WHERE ARE WE NOW?

DEFINING THE AVOCADO SECTOR IN UGANDA

OVERVIEW

The Ugandan avocado sector is a growing contributor to agricultural exports, with an estimated annual production of 47,000 tons. While the local 'Jumbo' variety dominates production, Hass avocado –valued for its export potential– is steadily gaining popularity.

Uganda's avocado sector is dominated by smallholder farmers growing local 'Jumbo' varieties (300–400 g), mainly for local and regional markets. These fruits lack uniformity, making them unsuitable for export. Although Hass and Fuerte varieties were introduced by the Food and Agriculture Organization of the United Nations (FAO) in the early 1990s, their smaller size (<300 g) made them unpopular locally. This discouraged adoption, especially among resource-poor farmers (Sseruwagi et al., 2025).

Since 2008, the National Crops Resources Research Institute, under the policy guidance and coordination of the National Agricultural Research Organisation, has promoted Hass and Fuerte through awareness campaigns, production guides and distribution of quality grafted seedlings nationwide. Hass avocado remains poorly accepted in Uganda's local markets, unlike in Kenya and, to a lesser extent, the United Republic of Tanzania, where it has been more successfully integrated into both domestic and export markets; however, avocados have started to gain some popularity domestically due to their nutritional benefits, providing an additional market for farmers. The domestic market still remains fragmented and underdeveloped, with challenges such as postharvest losses and inconsistent quality limiting its full potential. Investments in value addition, such as avocado oil processing, and awareness campaigns to promote consumption could further enhance the sector's contribution to rural incomes and food security.

In 2023, Uganda exported approximately $5.1 million worth of avocados, primarily to the Gulf Cooperation Council region, which accounted for 72% of exports. This growth aligns with Uganda's national agricultural strategy, emphasizing crop diversification amid fluctuating prices of traditional cash crops such as coffee and maize.

Despite these achievements, the avocado sector in Uganda faces several structural challenges. These include limited access to quality planting materials, pests and diseases, poor tree management/ flower abortion, inadequate cold chain infrastructure, and high production and logistics costs, all of which constrain the sector's ability to scale and compete in the global market. Programmes under the former National Agricultural Advisory Services (NAADS) are attempting to address these constraints. Further, political recognition under National Development Plan IV has bolstered support for the sector.

With increasing global demand for avocados and Uganda's favourable growing conditions, the sector has significant potential to drive economic growth and poverty reduction. Strategic investments in production and distribution system of seedling true to type, infrastructure, market development and capacity-building will be critical to building product specific avocado and ensuring the sector achieves its full potential, positioning Uganda as a competitive player in the global avocado market.

Production profile

Uganda's avocado production is primarily led by the local Jumbo variety, while Hass is increasingly gaining popularity for its export potential. However, the available data remains limited (see Table 1 for more details on avocado production in Uganda).

Table 1: Summary of avocado production in Uganda

Production level	Estimated annual avocado production: 47 million kg (NAADS, Aug 2023)
Area under production	• Hass: Approximately 7,000 acres (2024)* * The total area of Hass avocado plantations is not definitively known, as estimates vary. Some sources report approximately 12,816 acres (5,340 hectares) as of August 2023.[2]
Trees planted	• Number planted, at 160 per acre – 960,320 • Average 60% survival rate: 576,192
Seasonality of activities	• Main planting season: March to May (for Hass variety) • Harvesting season: October to December for most farms; some farms with different varieties may have staggered harvesting periods.
Export markets	• EU, Middle East, East African Community (EAC) regional market, and potential new markets such as China.
Type of variety	• Hass: Most popular for export, known for its long shelf life and high demand. • Other varieties: Smaller-scale farming of other avocado varieties like Pinkerton and Fuerte, depending on local preferences.
Employment generation	• Estimated number of farmers involved in avocado production: 100,000 (NAADS, August 2023)
Main production districts	• Hass: Mayuge, Sembabule, Luweero, Kampala, Mukono • Other varieties: Mayuge, Masaka, Mpigi, Mukono, Iganga

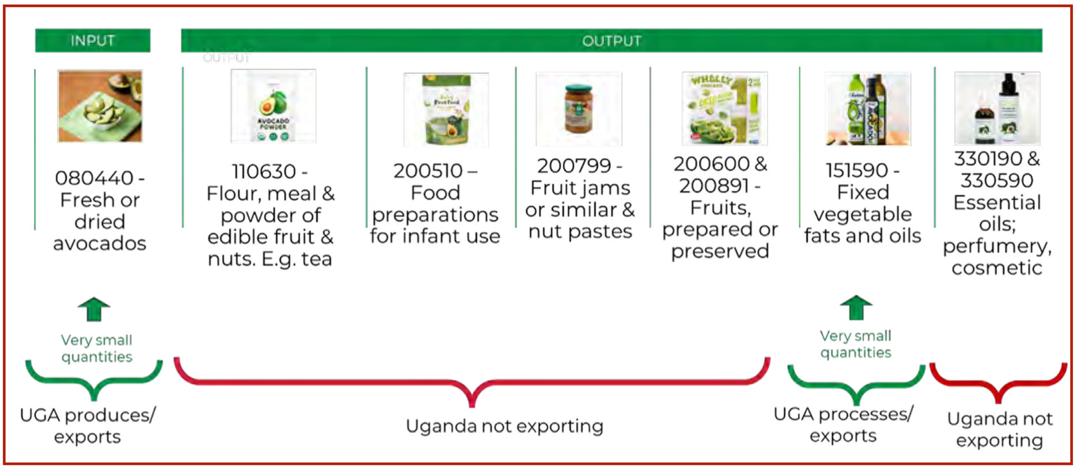
Product map for Ugandan avocados

This Avocado Roadmap encompasses the full spectrum of avocado products, including fresh fruit and various processed items. While fresh avocados currently dominate Uganda's production and export landscape, there is a need for diversification and value addition within the sector. This includes fostering the development of a range of avocado-based products, such as powders, oils and preserved preparations, which offer untapped potential in both domestic and international markets.

A detailed breakdown of the relevant Harmonized System (HS) codes highlights the vast opportunities available for product development. For instance, Uganda already exports fresh avocados (HS code 080440) in significant quantities. However, production of processed avocado products – such as avocado powder (HS code 110630), infant food preparations (HS code 200510), and fruit jams or pastes (HS code 200799) – has not yet been developed. This potential for value addition within the avocado value chain was identified through stakeholder consultations, which highlighted several processed avocado products that Uganda could competitively develop and export.

Similarly, as per the ITC Export Potential Map, the opportunity for exporting preserved avocado products (HS codes 200600 and 200891), and avocado oils and essential oils for use in cosmetics and perfumery (HS codes 151590, 330190 and 330590), remains largely untapped. The full breakdown of all the relevant HS codes and their subcategories can be found in Figure 1.

Figure 1: Fresh and value-added avocado product map



Source: International Trade Centre (ITC) based on stakeholders' consultation and the Export Potential Map.

2.– Hass avocado: The "Green Gold" Tuesday, June 13, 2023, accessed at: https://www.monitor.co.ug/uganda/business/prosper/hass-avocado-the-green-gold--4267172

Photo: (cc)Pexels, *pexels-anne-363161-997389.jpg*

Economic and socioeconomic contribution

The avocado sector in Uganda contributes to economic growth through job creation, export earnings and rural development. It supports thousands of smallholder farmers, enhances household incomes and fosters agribusiness investments, particularly in high-value Hass avocado production for export markets.

Environmental impact

The environmental impact of avocado farming in Uganda is mixed. While avocado trees help with carbon sequestration and soil conservation, large-scale production can strain water resources, especially in drier regions. Climate variability, including irregular rainfall and droughts, poses challenges, making irrigation and sustainable farming practices essential. Expanding avocado farms may also contribute to deforestation if not properly managed.

TRADE PERFORMANCE

THE AVOCADO SECTOR IN UGANDA

Uganda's avocado sector is at an early stage of development, with recent years marking a shift towards increased production and exports. As the second-largest producer of fresh fruits and vegetables in sub-Saharan Africa (FAO statistics), Uganda has the foundation to expand the production and exports of avocado internationally. In 2023, avocado exports reached $5.1 million (see Figure 2). Although exports were negligible before 2021, the sharp growth trajectory underscores the growing recognition of the sector's potential by both the Ugandan government and the private sector, which have been investing in its development.

The sector primarily relies on smallholder farmers, cultivating a mix of Hass and local Jumbo avocado varieties on approximately 13,000 acres. These efforts reflect a broader strategy to tap into export opportunities and integrate small-scale producers into international trade.

Horticulture plays a critical role in Uganda's agricultural exports, accounting for 85% of the total, as traditional cash crops like coffee, cocoa and maize face fluctuating global market prices. The diversification into high-value crops like avocados highlights the strategic shift to support economic resilience and capitalize on emerging market demand.

EXPORT TRENDS

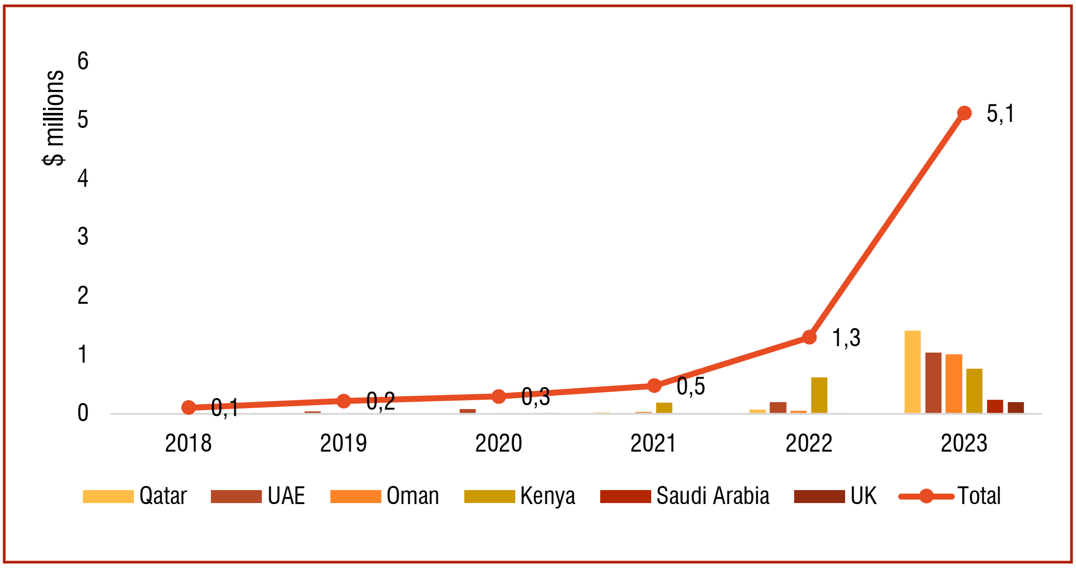
Uganda's avocado exports are concentrated in Gulf Cooperation Council countries, with 72% of exports in 2023 directed to Qatar, the United Arab Emirates (UAE), Oman and Saudi Arabia (see Figure 2). Local varieties like Jumbo cater to niche preferences in these markets, while Hass avocados, recognized for their global appeal, are being cultivated to meet international standards.

Uganda's favourable climate – thanks to its equatorial location and bimodal rainfall pattern that supports two avocado harvests annually (March to May and September to November) – positions the country to supply both domestic and international markets throughout the year.

The crop's adaptability across many regions in Uganda further enhances its viability as a high-value export commodity. Additionally, growing demand from markets in Europe, the Middle East and China underscores Uganda's opportunity to establish itself as a reliable supplier in the global avocado trade.

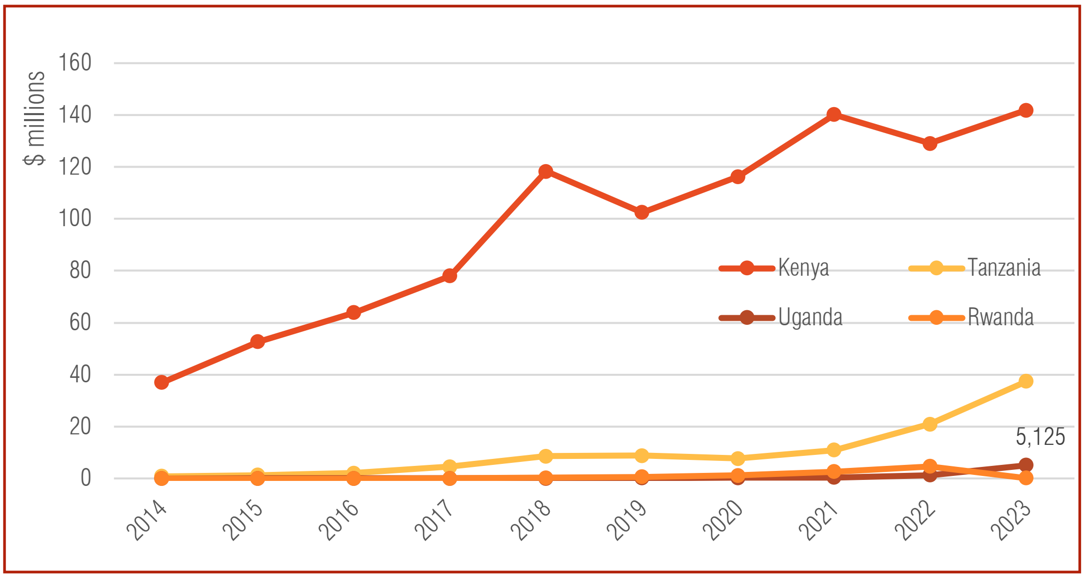
Within the EAC, Uganda is still an emerging player. Kenya leads regional exports, accounting for 123,000 tons in 2023, while the United Republic of Tanzania follows with 28,000 tons. Uganda, with 7,000 tons exported, represents a smaller share but shows a sharper growth trajectory compared to its peers (see Figure 3). These trends highlight Uganda's potential to catch up as investments in the sector yield results.

Figure 2: Exports of fresh avocado from Uganda, 2018–2023 (direct data) ($ millions)



Source: ITC calculations based on United Nations Comtrade statistics.

Figure 3: Exported value of avocado from EAC countries, 2014–2023 ($ millions)



Source: ITC calculations based on United Nations Comtrade statistics.

POLICIES IN PLACE

The Ugandan avocado sector is supported by several key policies aimed at boosting production, enhancing efficiency and addressing supply chain challenges. The former NAADS, under the Ministry of Agriculture, Animal Industry and Fisheries (MAAIF), implemented a strategic plan to increase avocado cultivation, particularly the Hass variety, which is in high demand both locally and internationally. During the 2024/25 financial year, NAADS planned to distribute over 400,000 Hass avocado seedlings, valued at UGX 2.5 billion, alongside 100,000 macadamia seedlings worth UGX 1 billion, across two planting seasons. This initiative aimed to cover approximately 1,250 acres during the 2024 planting season alone. Farmers who received these seedlings were required to prepare their farms and contribute 30% of the cost under a cost-sharing arrangement, ensuring their commitment to the programme.

Despite these efforts, the annual demand for Hass avocado seedlings exceeded 1 million, with the budgeted UGX 3.5 billion for seedling procurement only meet about 25% of this demand. This shortfall has created significant challenges for Uganda's five avocado processing factories, which struggle to operate at full capacity due to insufficient local supply. As a result, these factories have been forced to import avocados from Kenya and the United Republic of Tanzania to sustain their operations. This reliance on imports highlights the urgent need to scale up local avocado production to meet both domestic and export market demand (Agaba, 2024).

VALUE CHAIN DESCRIPTION AND COMPETITIVENESS DIAGNOSTIC

Uganda has a strong comparative advantage in avocado production, driven by favorable agro-climatic conditions, abundant arable land, and the unique benefit of two harvest seasons per year – unlike regional competitors such as Kenya, which have only one. This allows Uganda to offer a more consistent and extended supply to global markets. The government has recognized this potential and is actively supporting the sector through enabling policies, investment incentives, and inclusion of avocado in strategic agricultural programs, creating a conducive environment for scaling up production and export. Moreover, there is a clear willingness among farmers and stakeholders to develop avocado as a key cash crop, supported by the value chain's suitability for competitiveness in both regional and international markets.

However, the links in the avocado value chain are currently affected by the major seasonal and regional price variations, notably due to the short product shelf life and requirement

Photo: (cc)Pexels, *pexels-matthias-oben-2060028-3687927.jpg*

for timely picking. This price volatility reduces the predictability of business operations and makes businesses more vulnerable to loss risks. In addition, the value-added segment is currently only emerging. The main processes in the value chain are described below and characterized in the value chain map (see Figure 4).

Input providers: In Uganda, avocado cultivation relies on a network of input providers, primarily supplying seedlings, fertilizers and other agricultural inputs to both smallholder farmers and larger commercial farms. Smallholder farmers often depend on rural assemblers or local agro dealers for access to necessary inputs. They also focus on short-term pricing gains rather than long-term value (quality, branding and market positioning). For Hass avocado, which constitutes a smaller portion of total avocado production, seedling suppliers primarily import improved varieties from neighbouring Kenya, with subsidized programmes supporting accessibility. Equipment and machinery for value addition, such as oil processing and packaging, are crucial but remain limited to a few processing facilities. Overall, there are limited volumes of avocado: according to different estimates Uganda has between 7,000 acres and 12,816 acres of Hass under cultivation. To be viable, it must scale to at least 50,000 acres in the next five years.

Growers: Avocado growers in Uganda can be categorized into smallholder farmers organized into associations; cooperatives; and large commercial farms. Smallholders cultivate local avocado varieties primarily for domestic consumption, while large farms focus on the export-oriented Hass variety, leveraging economies of scale to meet international quality standards. These farms – such as Musubi, Balaji Agro and others – play a vital role in increasing Uganda's export capacity. Farmers often lack technical expertise in advanced orchard management practices, such as tree pruning and pest control, which limits yields and quality. To address these challenges, there is a growing need for tailored training and advisory services in GAP. Challenges include:

- Minimal pruning practices, leading to difficulty in harvesting and increased postharvest losses.
- Insufficient pest and disease management, causing damage to fruit and reducing marketability.
- Suboptimal irrigation and fertilization methods, resulting in poor fruit development and limited shelf life.

Besides, Hass avocado should be cultivated in ecologically suitable areas where water, soil and climate ensure commercial yields.

Rural aggregation agents and traders: Rural aggregation agents, often acting as buying agents, play a pivotal role in bridging the gap between farmers and packhouses or processors. They procure avocados from smallholder farmers, usually at lower prices, which often discourages quality-focused farming practices. Contractors, prevalent in larger farms, oversee harvesting, collection and initial grading before transferring the fruit to packhouses or exporters. Their focus tends to lean towards volume rather than quality enhancement, limiting the sector's competitiveness on global markets.

Photo: (cc)Pexels, *pexels-minan1398-740584.jpg*

Processors: Avocado oil processors account for a significant portion of value addition, using both local varieties and reject-grade Hass avocados. Currently, five major processors dominate this segment, producing avocado oil with varying levels of quality. Hass avocados offer higher oil content (10%) compared with local varieties (3.5%–7%), making them more desirable for oil extraction. Despite this, processing remains constrained by a limited supply of high-quality fruit and outdated processing techniques.

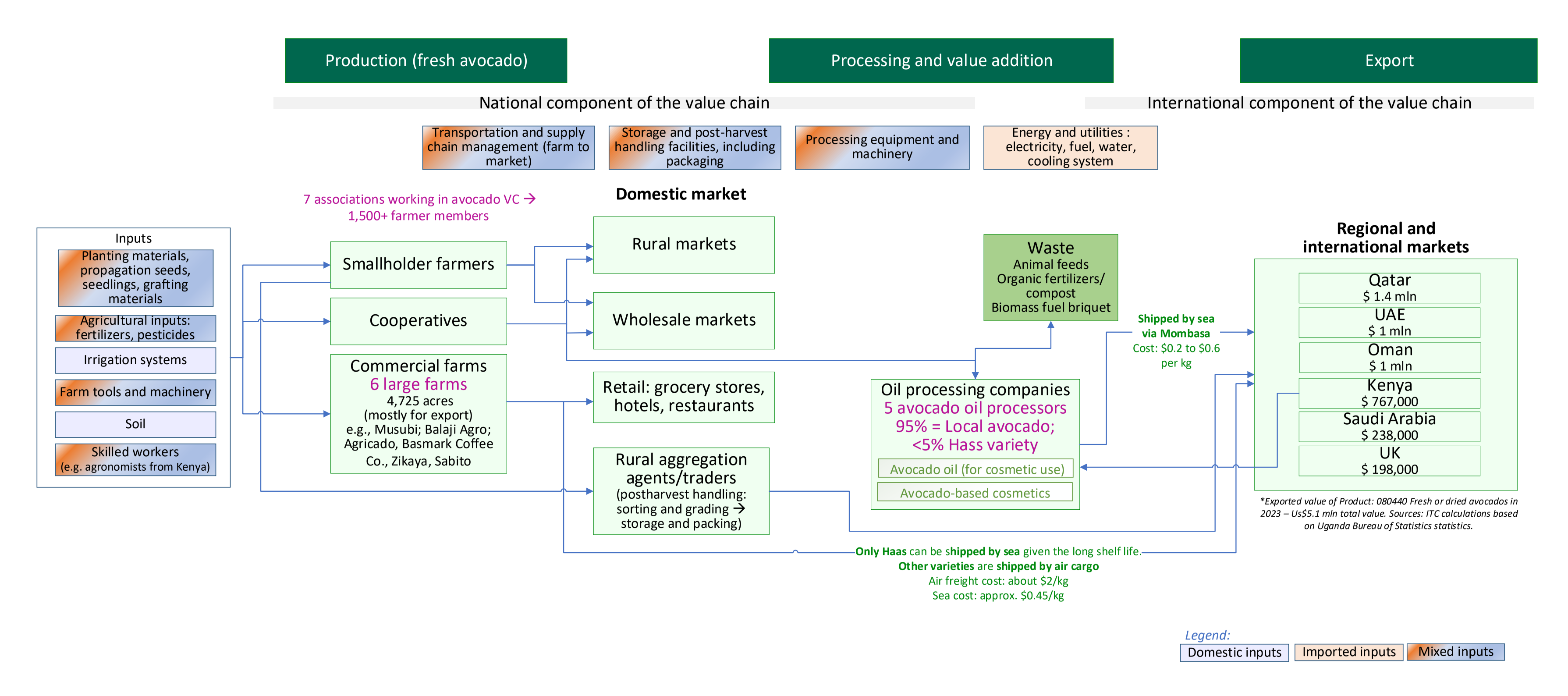
Domestic market: The domestic market for avocados is dominated by local varieties, sold primarily through grocery stores, roadside stalls and local markets. These varieties cater to a broad consumer base but lack the premium quality and nutritional value of Hass avocados. Efforts to educate consumers on the benefits of Hass avocados and increase their domestic availability remain limited. Local varieties are typically sold at a fraction of export prices, highlighting the price disparity within the value chain.

Exporters: Exporters primarily handle Hass avocados, which are packaged and shipped by sea to European destinations or by air to the Middle East. Uganda's favourable climate allows for a year-round supply, positioning the country as a potential key player in the international avocado market. Export logistics, including freight costs and shelf-life management, significantly influence profitability. Challenges in meeting stringent international standards and limited access to global market insights hinder growth potential.

Another element in the value chain is packhouses, which are critical in Uganda's avocado value chain, providing facilities for sorting, grading and packaging avocados for export. Only the Hass variety meets the requirements for long-distance sea freight, with careful packaging in crates and cartons to maintain quality. Limited mechanization and reliance on manual labour for grading remain key bottlenecks in enhancing efficiency and consistency. Kampala currently has only one specialized Hass avocado packhouse. Despite projections indicating a potential harvest of up to 14,000 tons by the end of the year, the existing infrastructure can handle only 240 tons for export. As a result, the majority of the produce is diverted to oil extraction, yielding just 25% of the value that could be obtained through fresh export channels.

Transport also plays a critical role in Uganda's avocado value chain, particularly for export. Trucks are the primary mode of transport from farms to packhouses and ports, with cost-efficiency often taking precedence over quality preservation. The costs are high – the shipping costs from Uganda to Mombasa average $5,000 per container, putting Uganda at a $0.21/kg disadvantage compared with Kenya. Shipping lines will only reduce rates if consistent volumes justify positioning refrigerated containers (reefers) in Uganda. The absence of a reliable cold chain system – particularly refrigerated trucks – and poor road infrastructure contribute significantly to postharvest losses. Hass must enter the cold chain within three hours postharvest. These challenges undermine the quality of avocados reaching export markets and limit Uganda's competitiveness internationally, because the logistic costs often exceed the value of the produce.

Figure 4: Value chain map of the avocado sector in Uganda



Source: ITC.

VALUE PER LINK ANALYSIS

Tables 2 and 3 highlights significant price disparities within Uganda's avocado value chain. For instance, Hass avocados fetch premium prices in export markets, reaching up to UGX 25,300 per kg in the EU. Conversely, domestic markets for local varieties reflect significantly lower prices, averaging UGX 1,000-3,000 per kg. Freight costs, particularly for air cargo (up to UGX 9,214/kg), remain a significant barrier to profitability. Similarly, processing rejects for oil generates only UGX 800–1,000 per kg, demonstrating limited value addition opportunities. These disparities reveal an imbalance along the value chain, driven by weak linkages, inadequate infrastructure, high logistics costs, limited market information, and the dominance of intermediaries who capture a disproportionate share of the value. Addressing these challenges through targeted investments to reduce freight and logistics costs, strengthen market linkages, and enhance domestic processing capacities is essential for making the value chain more inclusive and competitive, thereby incentivizing farmers to increase production quality and volumes for export. Table 3 illustrates the reliance on smallholder farmers for avocados for oil processing, with prices ranging from UGX 175 to UGX 500 per kg, depending on the season, highlighting the untapped potential for premium value-added products in the domestic market. To bridge this gap, enhanced support for agroprocessing and improved supply chain efficiency is essential.

Table 2: Value per link, Hass variety

Value chain link		Approximate selling price (per kg, in UGX)
1. Final consumer (exports)		• EU: 25,300 ($6.93) • UAE: 19,893 ($5.45) • UAE retail: 14,892–19,893 ($4.08–$5.45)
2. Domestic market (UGA)		No Hass for local consumption
3. Importers		N/A
4. Freight providers	Air	• Middle East: 3,833 ($1.05) • Netherlands: 9,125 ($2.50)
	Sea	• Europe: UGX 1,643 ($0.45) • Middle East: 1,424 ($0.39)
5. Packhouses		Grading: 254 (mechanized, container), 1,000 (manual, air) *(excl. boxes / pallets)*
6. Exporters (fruit)		3,000–4,000
7. Aggregators (fruit)		200–500
8. Smallholder farms (fruit)		2,000–3,000
9. Large farms (fruit)		2,000–3,000
10. Seedling provider		4,000–10,000 (subsidized 80%)
11. Exporter / processors (oil)		800–1,000
12. Aggregators (fruit for oil)		800–1,000 (reject export Hass)
13. Smallholder farms (oil)		700–1,000 (hand-selected) 950–1,000 (if delivered to farm, 3+ tons)
14. Large farms (oil)		UGX 700–1,000

Table 3: Value per link, local variety

Value chain link		Approximate selling price (per kg, in UGX)
1. Final consumer (exports)		• Kenya: 3,000 • South Sudan: 6,000 • UAE: 7,957–8,943 ($2.18–$2.45) • UAE retail: 7,957–11,916 ($2.18–$3.27)
2. Domestic market (UGA)		1,000–3,000
3. Importers		N/A
4. Freight providers	Air	• Middle East: 3,833 ($1.05) • Netherlands: 9,125 ($2.50)
	Sea	Europe: 1,643 ($0.45) Middle East: 1,424 ($0.39)

Value chain link	Approximate selling price (per kg, in UGX)
5. Packhouses	N/A
6. Exporters	N/A
7. Exporter / processors (oil)	18,250 ($5.00)
8. Aggregators (fruit for oil)	• UGX 300–500 depending on season • UGX 175 – direct from farmers
9. Smallholder farms (oil)	Average UGX 100–200
10. Large farms (oil)	Average UGX 100–200

Source: ITC based on stakeholder consultations.

KEY ISSUES AFFECTING THE COMPETITIVENESS OF THE AVOCADO SECTOR

The avocado sector in Uganda holds immense potential to drive economic growth, improve rural livelihoods and position the country as a significant player in regional and global markets. However, the sector faces a range of interconnected constraints that hinder its ability to fully capitalize on these opportunities. These challenges span the entire value chain, from inadequate access to quality planting materials and technical knowledge gaps among farmers to systemic issues such as unreliable data collection and high costs associated with extension services. Addressing these constraints is essential to foster a competitive, sustainable and inclusive avocado industry in Uganda. This section outlines the key barriers limiting the sector's growth and provides actionable solutions to overcome them, paving the way for enhanced productivity, value addition and market access.

Figure 5: ITC four gears competitiveness constraints analysis framework

SUPPLY-SIDE CONSTRAINTS

Main challenges	Root causes	PoA reference
Lack of reliable certified nurseries results in limited high-quality Hass avocado seedlings	• No structured evaluations are conducted on seed quality, rootstock selection, grafting methods, or pest and disease management in nurseries. • Weak enforcement of certification standards (e.g. Global Gap, EU Organic), with little to no follow-up monitoring to ensure continued compliance. • Some nurseries replace genuine Hass seedlings with other varieties to cut costs. • Limited research into locally suitable rootstock varieties, leading to lower yields.	1.1.1 to 1.1.5 and 1.2.1 and 1.2.4.
Low adoption of Global GAP standards, including gaps in pest and disease management as well as limited knowledge of good production and postharvest practices, contributes to reduced productivity and lower yields in Hass avocado production	• High Global GAP certification costs and uncertain returns discourage farmers from adopting the standard. • Limited, non-continuous training and support on Global GAP and Hass-specific production practices. • Inadequate technical knowledge and tools for managing avocado-specific pests and diseases. • Limited availability of and access to affordable, appropriate crop protection solutions. • Capacity constraints and insufficient technical expertise within public extension services. • Weak links between research institutions, extension services and farmers hinder uptake of best practices. • Limited water retention capacity and insufficient irrigation infrastructure at farm level hinder consistent water supply during critical growth stages, which results in avocados often failing to reach the full size and quality required for export markets.	Operational Objective 1.3.
Hass avocado export rejects not used for oil processing	• Lack of a proper collection system to collect, transport and distribute rejected avocados (rejected fruit is often wasted or sold cheaply in local markets). • Poor quality of export rejects for oil extraction.	1.5.2.
Inadequate knowledge and skills in processing avocado for oil	• Production of avocado oil is a new industry, and there are no education or training programmes in the country on operating avocado oil processing factories and equipment. • It is very expensive and to bring in experts from Kenya.	1.5.1. and 1.5.2
High operational and production costs limit the competitiveness and profitability of avocado sector	• High production costs, primarily due to elevated water and power tariffs. • Industrial players outside designated industrial parks do not benefit from reduced rates. • Inconsistent power supply, which often operates only 2–3 days a week, forces businesses to rely on costly generators. • Ineffective allocation of grant funding and subsidies within the avocado sector, limiting the development of export capacity and market access: support mechanisms often prioritize upstream actors (e.g. producers) without adequately targeting exporters and logistics providers who are critical for aggregation, branding, international compliance and access to premium markets.	Not covered in the PoA
Poor storage and handling of avocados	• Collecting avocados in plastic bags or sacks in open-body trucks. • No training on proper packing and transport of avocados. • Inadequate storage infrastructure and cold rooms at collection points.	1.4.3., 2.3.1., 2.3.2.
Stakeholders noted that avocados produced in Uganda are purchased by Kenyan traders and exported through Kenya, potentially reducing Uganda's ability to consolidate	• Uganda's dual harvest seasons create an attractive off-season supply for Kenyan exporters, who have only one main season but face constant international demand. • Weak national branding and limited cold chain infrastructure in Uganda make it easier and more profitable for Kenyan buyers to use existing Kenyan logistics and export systems. • Lack of coordinated aggregation and export capacity at the national level reduces incentives for Ugandan producers to sell through domestic channels. • Limited enforcement or incentives to encourage domestic export registration and traceability.	3.1.1., and 3.2.1.

QUALITY OF THE BUSINESS ENVIRONMENT

Main challenges	Root causes	PoA reference
Limited reliable data on Hass avocado production	• Avocado is not included as a stand-alone crop in the annual agriculture survey and there is no centralized body tracking production figures. • Limited funds in the annual national budget to collect and manage meaningful data for the entire agriculture sector.	2.2.1. and 2.2.2.
No collective coordinating platform in place to address the challenges faced by the avocado sector	• The majority of avocado farmers in Uganda are smallholder farmers and are fragmented, each working on small plots of land. • Limited coordination between farmers makes it difficult to address issues like market demand fluctuations, and pricing. • Duplication of efforts and gaps in critical areas due to poor coordination: key institutions operate in silos, reducing opportunities for joint initiatives and pooled resources. • Competitive mindset and resistance to collaboration with other farmers, low level of trust. • Lack of coordination and market responsiveness has led to underperformance in other value chains, a risk now mirrored in avocado sector. • Fragmentation across the supply chain limits Uganda's ability to meet large-scale or consistent export demand, constraining the sector's growth potential.	2.1.1. and 2.1.2.

Main challenges	Root causes	PoA reference
Regulatory and tax barriers adding red tape and costs	• The process to obtain tax exemptions for machinery imports is cumbersome, bureaucratic and time-consuming. • Avocado oil exporters are required to pay value-added tax (VAT), which reduces competitiveness. • Tax authorities are not enforcing regulations correctly, requiring exporters who want to qualify for duty drawback to purchase cartons from designated local suppliers, which is very expensive. As a result, exporters end up paying duty and importing cartons from Kenya because it is cheaper and easier than sourcing them domestically. • Processors face taxes on importing machinery or parts, which appears to contradict the spirit of exemptions intended under the EAC Common External Tariff.	1.5.3. and 1.5.4.
Ugandan avocado oil was not considered when developing the Codex standard for avocado oil	• Limited coordinated advocacy between the private and public sectors. • Insufficient representation from Ugandan or EAC representatives in Codex meetings where standards are discussed.	1.5.1.
High reefer costs increase export expenses	• Limited avocado export volume in Uganda prevents private sector freight providers from maintaining permanent reefers in the country, reducing the price competitiveness of Ugandan avocados in international markets.	Not covered in the PoA
Lack of aggregation centres	• No collection points on the farm. • On-farm infrastructure is non-existent.	1.4.1., and 3.1.1.

MARKET ENTRY

Main challenges	Root causes	PoA reference
Many Ugandan avocados fail to meet the size, taste, and quality standards required by export markets and, as a result, cannot be exported	• Limited access to improved varieties, poor post-harvest handling, and lack of standardized grading and sorting practices. • Limited market intelligence and awareness: Farmers and exporters often lack timely and accurate market information on buyer preferences, quality requirements, and price trends. This gap hinders their ability to adjust production and marketing strategies to meet demand effectively.	1.4.3.
Market entry barriers such as stringent phytosanitary and quality certification requirements in export markets present challenges for exports	• Limited knowledge and understanding of these standards, inadequate training. • High costs associated with certification, testing, and compliance further restrict market access, especially for smallholder farmers and small-scale exporters.	Operational objective 1.1.
Insufficient market access and promotion	• Underdeveloped market intelligence regarding variety preference and aesthetics in importing markets. • Marketing is seen as a secondary concern, with no investment in branding or packaging. • Lack of coordinated marketing strategies and institutional support to develop and promote a national or regional avocado brand.	3.2.2., 3.1.1. to 3.1.5
Limited branding and poor market positioning, which reduces its ability to differentiate itself in competitive export markets	• Limited production volumes and inconsistent quality make it challenging to guarantee a steady supply of branded produce, which reduces investor and buyer confidence in building a brand around Ugandan avocados. • Insufficient resources and expertise among farmers, exporters, and government bodies to invest in brand development, packaging innovation, and certification schemes (e.g., geographic indicators or organic labels).	3.2.1.

DEVELOPMENT GOALS

Main challenges	Root causes	PoA reference
Challenges in managing waste	• Limited waste management infrastructure – most waste is either sent to landfills or informally disposed of. • Few sustainable options exist beyond composting, black soldier fly feed, and small-scale briquette production. • Insufficient enforcement, inadequate monitoring and limited awareness of the National Environment (Waste Management) Regulations, 2020 requirements.	Not covered in the PoA

PART II: WHERE DO WE WANT TO GO?

Photo: (cc)Pexels, *pexels-bulbfish-1143754.jpg*

WAY FORWARD

The avocado sector in Uganda holds significant potential to drive socioeconomic development by leveraging improved production and value addition and building reliable volumes. To realize this potential, competitive constraints will need to be addressed.

VISION

To fully realize this potential and tap significant growth opportunities, the sector should proactively address the obstacles impeding its expansion. Enhanced production capacity – including improving farming techniques and increasing access to quality planting materials – is a cornerstone for advancement, alongside the imperative of investing in cold chain systems, storage facilities and transportation to reduce postharvest losses and improve efficiency; as well as strengthening market links.

Industry stakeholders looking to bring a higher level of performance and sophistication to the Ugandan avocado industry developed the following vision.

> "A vibrant, export-driven Ugandan avocado sector supporting farmers and creating jobs"

THE STRATEGIC OBJECTIVES

The Roadmap's PoA will respond to this vision by addressing the sector's constraints and leveraging opportunities comprehensively and strategically. To this end, particular efforts will be made to further skills development and acquisition, enhance the policy and business environment, improve market structures, and leverage investment as a driver of structural change within the sector through the accomplishment of the following three strategic objectives and their associated operational objectives (see Figure 6). The operational objectives are further broken down into a practical and realistic set of activities, presented in the PoA.

Photo: (cc)Pexels, *pexels-dana-tentis-118658-1213710.jpg*

Figure 6: Strategic and operational objectives

1. Enhance production, improve productivity, and promote value addition in the avocado sector	2: Strengthen the enabling business environment for the avocado sector	3. Expand market access and promote Ugandan avocados to increase exports
• 1.1. Increase access to high-yielding, certified and market-suited Hass avocado seedlings • 1.2. Develop new high-yielding varieties • 1.3. Improve farm-level production and postharvest techniques • 1.4 Improve collection, storage, packing and packaging • 1.5. Increase avocado oil processing	• 2.1 Improve coordination for the avocado sector • 2.2. Enhance data collection in the sector • 2.3. Streamline business processes	• 3.1 Attract quality investment in key areas of the value chain (packaging, cold chain, etc.) • 3.2. Consolidate market development efforts • 3.3. Increase overseas promotion of Ugandan avocados

FUTURE VALUE CHAIN

Unlocking the potential of the avocado sector will require transformations throughout the value chain. These adjustments, as reflected in the future value chain schematic (see Figure 7), are the result of targeted efforts to address the competitive constraints identified and capitalize on opportunities to add value.

The future value chain presents a transformative opportunity for the country by unlocking synergies across production, processing, and export. It will catalyse rural development by integrating smallholder farmers into higher-value markets through improved post-harvest handling, logistics, and packaging. Strengthened backward linkages—such as access to quality inputs, seedlings, and farm tools—will enhance productivity, while forward linkages, including processing companies and export channels, will enable diversification into value-added products like edible oils and cosmetics. These advancements are expected to create jobs, develop technical skills, and stimulate entrepreneurship across the agrifood system.

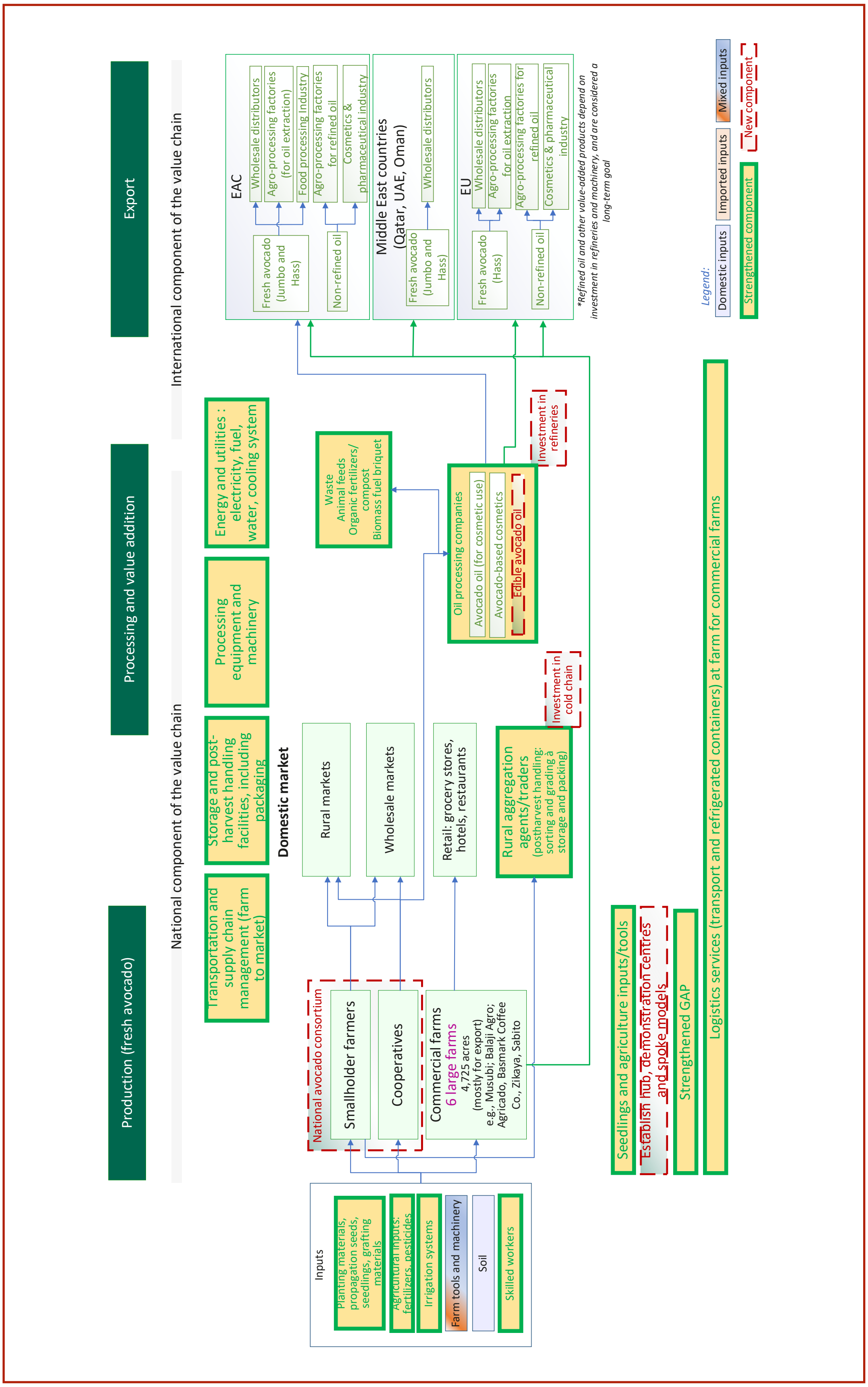
The future value chain will also attract greater institutional investment and private sector engagement. The establishment of hubs, spoke models, and a national avocado consortium will foster collaboration and coordination among stakeholders. Export growth to the EU, EAC, and Middle East will be supported by improvements in quality assurance, cold chain infrastructure, and compliance with international standards. With increased processing capacity and market diversification, the country can reduce dependency on raw avocado exports and capture more value domestically. This will ultimately lead to increased foreign exchange earnings, higher incomes for farmers, and enhanced national food security.

Photo: (cc)Pexels, *pexels-foodie-factor-162291-557659.jpg*

However, realizing this potential requires significant groundwork. Key enablers include policy reforms that incentivize investment in agro-processing and reduce barriers to trade-such as rationalizing tariffs, simplifying export procedures, and facilitating access to finance. Institutional strengthening is crucial to ensure that government bodies, cooperatives, and industry associations can effectively coordinate support services, enforce standards, and implement traceability systems. A cultural shift toward quality, innovation, and sustainability must be encouraged through training, awareness campaigns, and inclusive knowledge-sharing platforms.

To drive implementation, a national action plan is developed with clear milestones and responsibilities. This plan prioritizes: (1) increasing production and value addition; (2) creating an enabling business environment; and (3) strengthening logistics. Success will depend on strong institutional coordination, clear accountability, and robust monitoring systems. With the right mix of reforms, investments, and stakeholder engagement, the sector can become a cornerstone of Uganda's agricultural transformation and inclusive economic development.

Figure 7: Future value chain

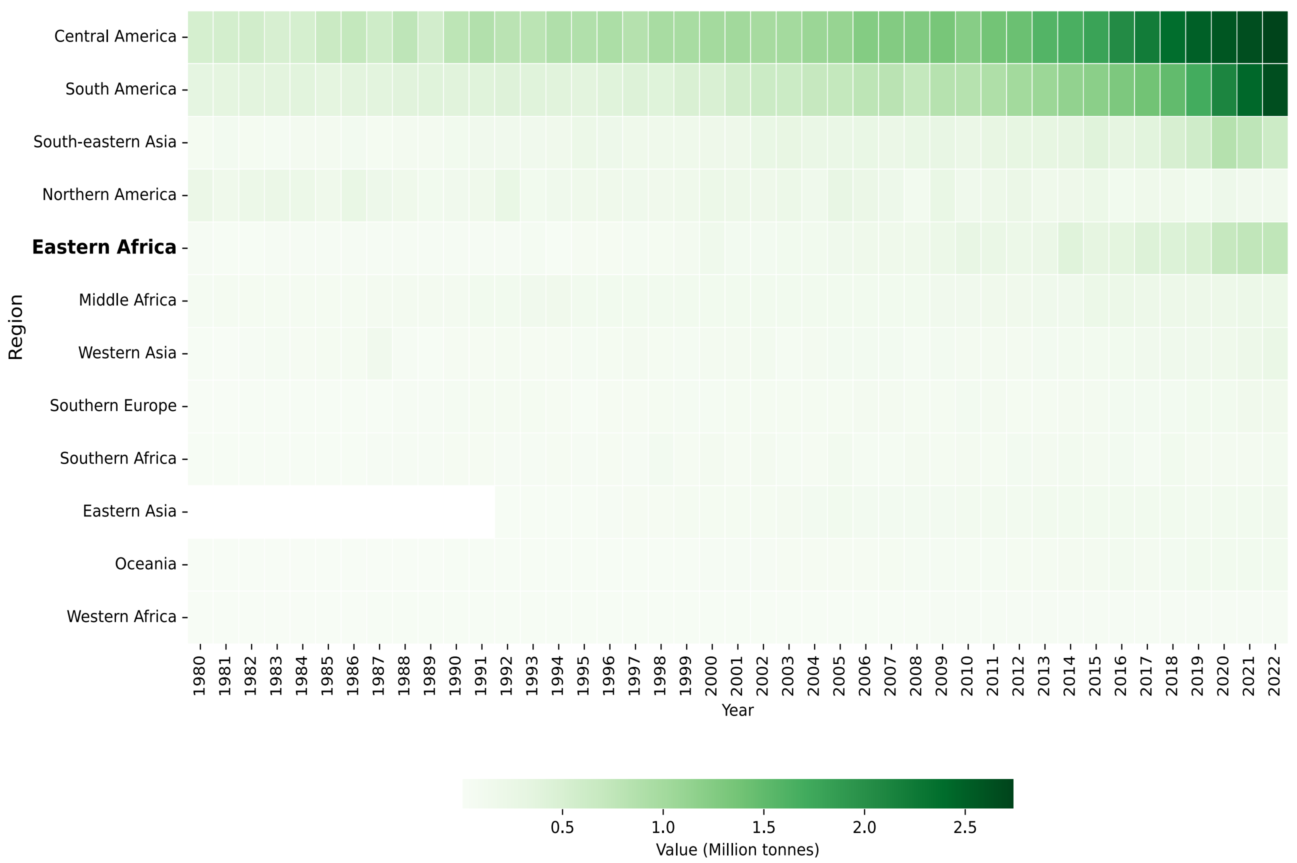


Source: ITC, based on stakeholder consultations.

GLOBAL TRENDS IN AVOCADO PRODUCTION AND EXPORT

Over the past four decades, the global avocado industry has grown exponentially, with Latin America – especially Mexico – dominating production and exports. Mexico is the world's largest producer and exporter, supported by a favourable climate, modern farming practices and strong demand from North America, Europe and Asia. Other key Latin American players such as Colombia, Peru and Brazil have also expanded rapidly, underpinned by irrigation investment and improved agronomy (see Figures 8 and 9).

Figure 8: Avocado production by region, 1980–2022 (millions of tons)



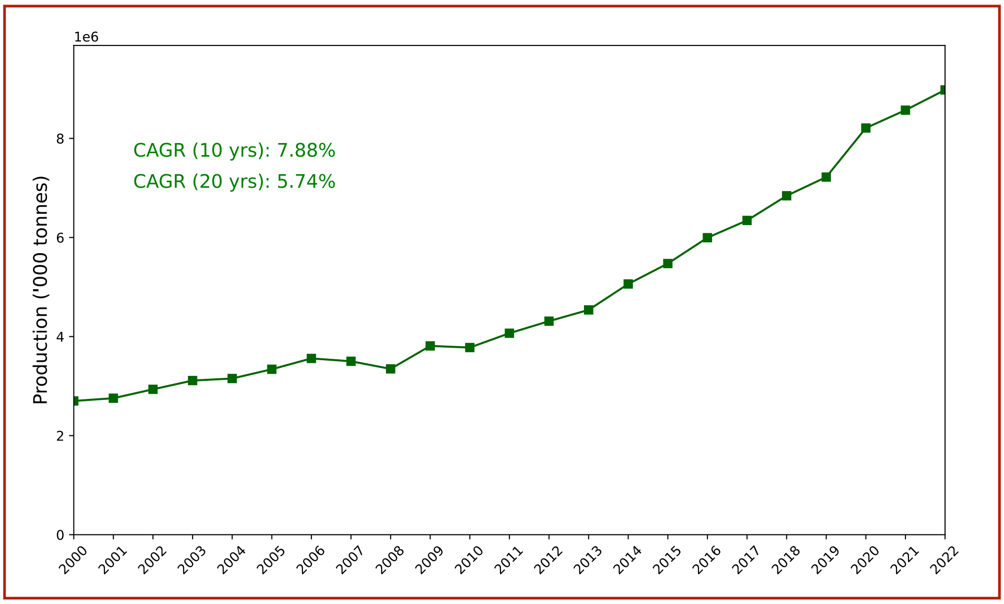
Source: FAOStat, 2022.

From 2000 to 2020, global avocado production grew at a compound annual growth rate (CAGR) of 7.88%. Global avocado production is projected to grow at 5.2% annually between 2021 and 2030, a slower pace compared to the 8.3% growth of the previous decade (Imbert, 2023). This reflects the maturing of traditional markets such as the United States of America and the EU. However, demand continues to rise in emerging regions, creating strategic opportunities for East African producers to target markets in the Middle East and Asia.

Mexico remains the largest producer (30% of global production in 2021), followed by the Dominican Republic, Peru, Colombia, Indonesia and Kenya. By 2030, Colombia is expected to overtake Peru, and Kenya will maintain its position among the top producers, underscoring its potential as a regional leader.

While production is rising, global exports are growing even faster – at an expected annual rate of 5.7%. This highlights the importance of an export-oriented strategy, emphasizing investment in quality standards, cold chain systems and market certification.

Figure 9: Avocado production growth, 2000–2022 (thousands of tons)



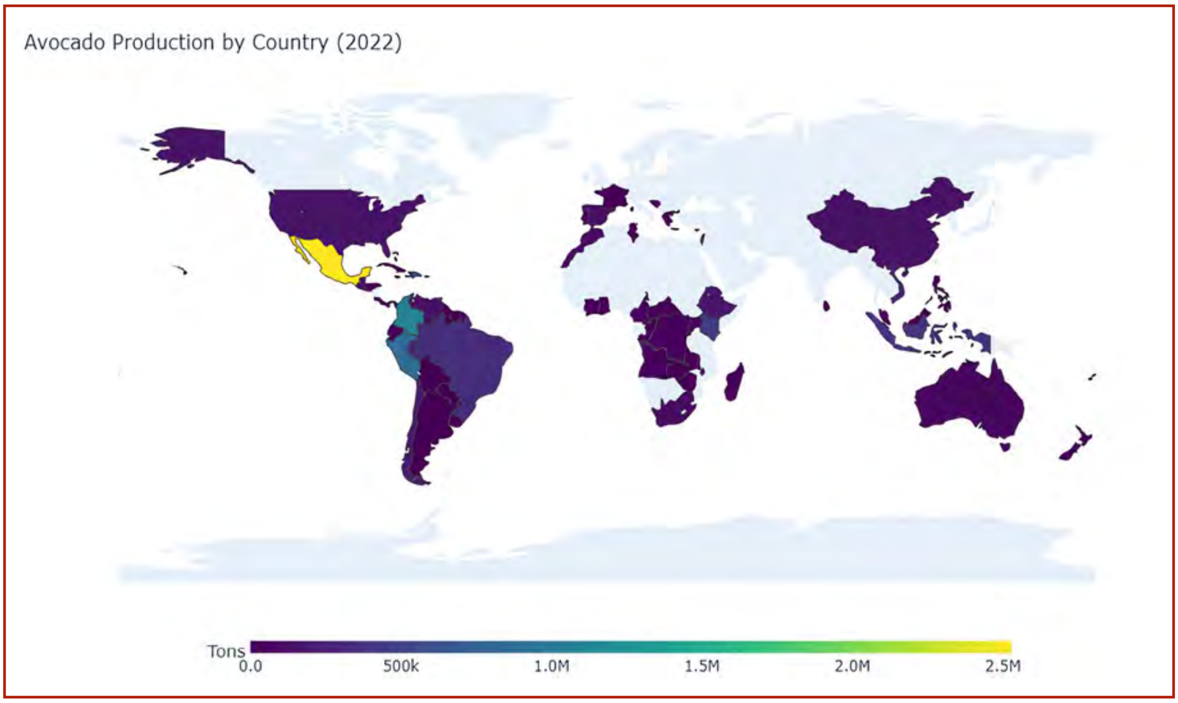
Source: FAOStat, 2022.

MARKET SHIFTS AND EMERGING PRODUCERS

Emerging producers in East Africa and Asia are diversifying the global supply landscape. Kenya, for example, now ranks fifth globally in avocado production and contributes 5% of the global total. South-East Asian countries such as Indonesia are also gaining ground, driven by both domestic and international demand (see Figures 10 and 11).

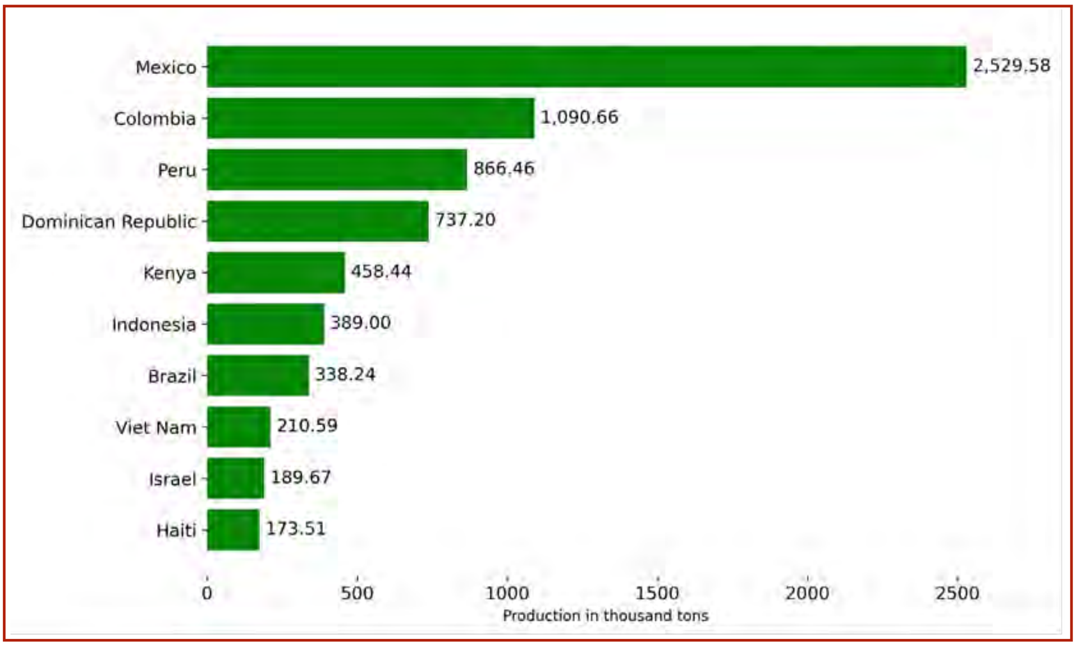
Colombia is projected to surpass Peru by 2030 in total production, while Kenya is expected to retain its top 10 position globally, highlighting the growing importance of East Africa in the global supply chain. As traditional markets mature, emerging markets such as China and the Middle East offer new frontiers for export growth (Imbert, 2023).

Figure 10: Global avocado production, 2022 (in value)



Source: FAOStat, 2022.

Figure 11: Global avocado production, 2022, by volume (thousands of tons)

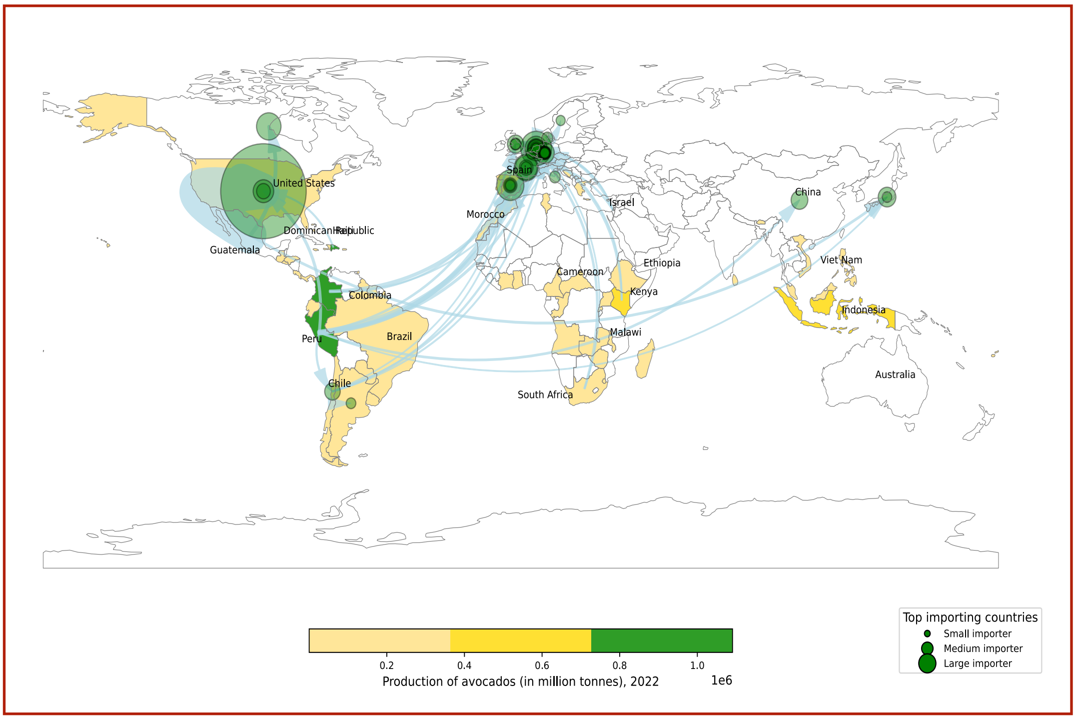


Source: FAOStat, 2022.

GLOBAL TRADE AND EXPORT DYNAMICS

Global avocado exports are expected to grow at 5.7% annually, outpacing production. The trade value reached $6.9 billion in 2022, led by Mexico, Peru and Colombia (see Figure 11). The United States remains the largest importer, followed by key European markets (France, Germany, the Netherlands). Asia is showing strong import growth due to rising health awareness, especially China and Japan.

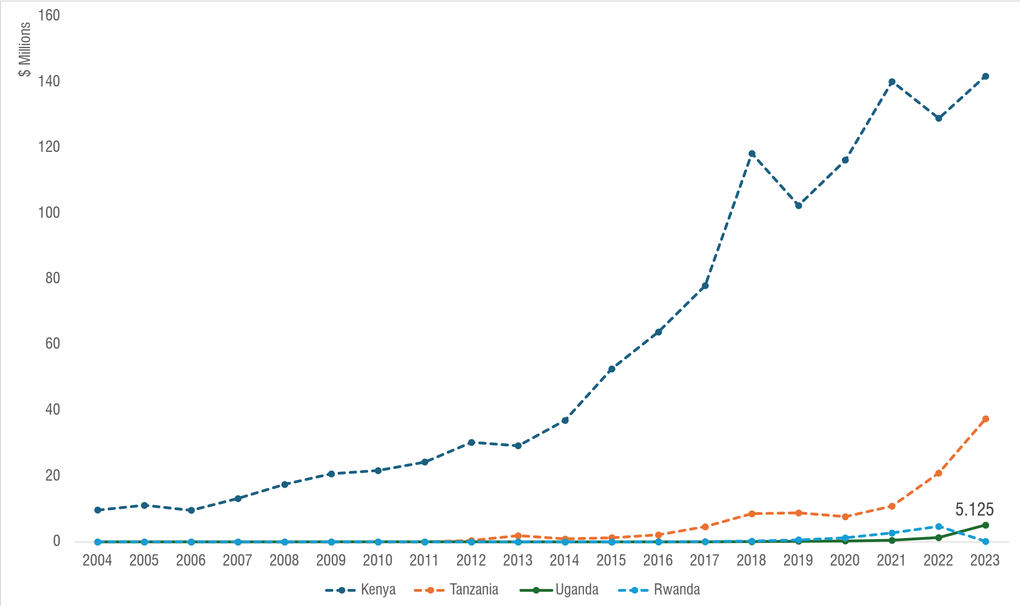
Figure 12: Production and trade of avocados



Source: FAOStat, and ITC Comtrade statistics, 2022.

Eastern Africa is steadily increasing its export contribution. The EAC exported $184 million worth of avocados in 2023, representing 2.5% of global trade (see Figure 13). This growth has been fuelled by improvements in farming techniques, increased alignment with international quality standards, and improved trade logistics.

Figure 13: Disaggregated exports from the EAC, 2004–2023 ($ millions)



Source: ITC Comtrade statistics, 2022.

OPPORTUNITIES FOR UGANDA'S AVOCADO SECTOR

Uganda is well-placed to scale its avocado sector and capture value in both regional and international markets. The country already supplies fresh avocados to the Middle East, EU and EAC. However, to strengthen access to the EU, Uganda must meet strict standards and invest in washing, packaging and value addition. The Hass variety, in particular, holds strong potential for the EU market, where certification standards and cold chain infrastructure are crucial for success.

To tap into emerging markets like China, Uganda will need to comply with sanitary and phytosanitary standards, and form partnerships with local distributors. Uganda can also diversify its offerings by developing processed avocado products such as guacamole, avocado pulp and frozen avocado. These products are gaining traction in the EU and United States due to rising demand for healthy convenience foods. Additionally, Uganda can capitalize on the growing market for frozen avocado in Asia by investing in freezing technology, cold chain logistics and partnerships with Asian food processors.

Despite the global dominance of Mexico and Peru in avocado exports, especially to the United States and Europe, Peru's expanding production poses a risk of seasonal oversupply, potentially affecting EU prices during Uganda's second harvest season (September–November). While Uganda may not compete on volume with these giants, it can carve out a successful niche by focusing on quality, consistency, and certifications such as Global GAP and organic. Targeting off-peak periods, particularly March–May, when Peruvian volumes are lower and European demand remains strong, can offer Uganda an opportunity to meet market demand. Additionally, expanding into markets beyond the EU, such as the Middle East and Asia, will further strengthen Uganda's position in the global avocado value chain.

By focusing on quality, certifications and diversifying market reach, Uganda can overcome volume challenges and establish itself as a competitive player in the global avocado market.

Other options, such as guacamole / avocado pulp (new product) and avocado-based baby food or similar preparations (e.g. purees, blends and fortified products), were explored. However, these remain long-term opportunities due to the need for further market development and investment.

Additionally, attracting investment to establish an oil refinery and other infrastructure for value-added processing remains a key long-term priority to enhance the sector's competitiveness.

Table 4: Opportunities for avocado product and market development

Fresh avocados			
Specific product	**Target market**	**Why?**	**What is required to reach the market?**
Short and medium term (1-3 years)			
Local variety (Jumbo)	Short term (existing markets) • Middle East (Qatar, UAE, Oman) • Regional EAC market	Middle East: • High demand for fresh produce • Growing retail and hospitality sectors • Existing trade ties with East Africa EAC: • Established trade routes • Lower logistics costs	• Middle East: Compliance with basic quality standards, proper packaging, and efficient logistics for timely delivery. • Regional EAC market: Easier market access with lower transportation costs and fewer trade barriers, but still need to ensure compliance with EAC standards, provide phytosanitary certification, ensure proper packaging and grading, and other trade documentation such as Certificate of Origin, etc.
Hass avocado (preferred variety due to longer shelf life and high demand)	Short term (existing markets) • Middle East (Qatar, UAE, Oman) • Regional EAC market Medium term (new market) • EU (distributed through Spain or the Netherlands)	Middle East: • Same as above EAC: • Same as above EU: • Large and mature avocado market • Off-season supply potential (e.g. when Peru and Mexico are out of season) • Premium pricing opportunities • Favorable EU-Africa trade relations: Everything but Arms initiative (duty-free and quota-free)	• Regulatory compliance: with EU Health and safety standards (e.g. Global GAP, phytosanitary certification, organic certification if applicable, etc.). • Postharvest handling: Investment in washing, packing and value-addition facilities to maintain quality. • Cold chain logistics: Proper storage and transportation infrastructure to ensure freshness. • Farmer training: Ensure Hass-specific agronomic practices to meet EU quality standards.
Processed avocados			
Specific product	**Target market and why?**	**Why?**	**What is required to reach the market?**
Short term (1-2 years)			
Avocado oil, non-refined (old product)	• EU (existing market) • United States (new market)	EU: • Established demand • Niche appeal • Sustainability preference • Favorable trade access United States: • Rapidly growing market • Health-driven consumers	• Marketing and branding to position Ugandan avocado oil as a premium product. • Compliance with Health & Safety Standards such as EU Food Safety – Regulations No. 178/2002 (general food law), Contaminant Levels – Regulation (EC) No. 1881/2006, Pesticide Residues – Regulation (EC) No. 396/2005 on Pesticide Limits, Mycotoxins and Microbiological Safety.
Medium term (3 years)			
Avocado oil, refined (new product) – subject of investment	• EU • EAC	EU: • Industrial demand • Scalability (refining allows Uganda to handle cosmetic-grade or bulk food-grade oil for larger contracts) • EU regulatory readiness (investment in food safety and traceability systems can open the door to large B2B buyers) EAC: • Regional manufacturing • Intra-regional trade benefits	• Compliance with EU regulations regarding health and food safety including Maximum Residue Limits – Regulation (EC) No. 396/2005, Food Additives – Regulation (EC) No. 1333/2008, Contaminants – like aflatoxins and heavy metals under Regulation (EC) No. 1881/2006. • The correct HS code for refined avocado oil is 151590 (vegetable oils, refined, others) to determine applicable tariffs and duties. • Compliance with EU Customs procedures for importation.
Frozen avocado pulp or cubes (new product; facilities exist for frozen vegetables such as sweet potatoes, peas, cassava)	• EU (growing demand for ready-to-eat avocado products)	EU: • Rising demand for convenience • Supply gaps with Latin America exporters • Reduced wastage and longer shelf life • Food service and retail segments (targeted toward cafés, restaurants, and health-conscious consumers)	• Compliance with Health and Safety Standards: EU Food Safety Regulations such as Regulation (EC) No. 178/2002 (general food law), Regulation (EC) No. 852/2004 (food hygiene), Maximum Residue Limits – Regulation (EC) No. 396/2005, Microbiological Safety – Regulation (EC) No. 2073/2005 on foodborne pathogens (e.g. salmonella, listeria). • Proper packaging and labelling including compliance with Regulation (EU) No. 1169/2011; frozen storage instructions; sustainable packaging. • Compliance with EU Customs procedures for importation.

PART III: HOW DO WE GET THERE?

BRIDGING THE GAP: FROM DIAGNOSTICS TO IMPLEMENTATION

As explained above, Uganda is uniquely positioned to become an important player in the global avocado market. The country boasts a significant comparative advantage, thanks to its favorable climate, allowing for dual harvest seasons, and a rapidly expanding network of both smallholder and commercial producers. To truly capitalize on this, Uganda can carve out a competitive niche by strategically targeting specific markets, upholding rigorous quality and certification standards, and developing higher value processed avocado products for export.

The implementation of the avocado value chain roadmap is expected to bring significant improvements to Uganda's avocado sector, including:

- More trained farmers with improved agronomic and post-harvest skills, leading to higher yields and better-quality fruit. These improvements will directly contribute to greater farm profitability and competitiveness in both local and export markets.
- Improved collection and aggregation practices that reduce losses and ensure consistent supply of avocados from farms to markets. These improvements will help maintain product freshness and quality, facilitate volume consolidation, and enable consistent delivery to meet buyer demands – critical for accessing high-value markets.
- Stronger linkages and coordination between farmers, aggregators, exporters, and other value chain actors, enhancing market access and price negotiation power. Ultimately, this coordinated approach will increase the value captured by local stakeholders and support the development of a more competitive avocado industry.
- Expanded value addition and product diversification: Investment in processing facilities and technical expertise will enable the creation of higher-value avocado products, such as avocado oil, frozen avocado pulp and ingredients for cosmetics and pharmaceuticals. This diversification will open up new revenue streams, extend shelf life, reduce reliance on fresh fruit exports, and significantly increase the overall value captured within Uganda.

Realizing Uganda's full avocado export potential requires concerted effort and support across political, institutional, and cultural levels.

AT THE POLITICAL LEVEL

- Policy and investment: Enact and rigorously enforce policies that actively promote investment in avocado production, robust quality control measures, and streamlined export facilitation. This includes incentives for both local and foreign investors.
- Infrastructure development: Allocate substantial resources towards critical infrastructure improvements, including better roads, enhanced cold chain facilities, modern storage facilities, and efficient logistics networks. These investments are vital for ensuring timely and quality-controlled market access, reducing post-harvest losses, and improving overall supply chain efficiency.

AT THE INSTITUTIONAL LEVEL

- Farmer capacity building: Strengthen agricultural extension services and develop comprehensive training programs designed to significantly build the capacity of avocado farmers in best practices, modern cultivation techniques, and sustainable farming. This includes a strong focus on GAP to ensure safe, high-quality, and environmentally responsible production.
- Quality, certification, and international standards: Support certification and quality assurance systems. These systems are essential to not only meet stringent international export standards (such as GlobalG.A.P., phytosanitary requirements, and market-specific regulations) but also to build strong buyer confidence and secure access to high-value markets.
- Data-driven market intelligence: Facilitate and support sophisticated market information systems that provide real-time, actionable intelligence to farmers and exporters. This ensures they have access to current market trends, pricing, demand, and critical data on consumer preferences and quality benchmarks, enabling informed decision-making and strategic market positioning. The collection, analysis, and dissemination of reliable agricultural data are paramount for optimizing production, reducing risks, and identifying emerging opportunities.

Photo: ITC

AT THE CULTURAL AND COMMUNITY LEVELS

- Culture of quality: Foster a widespread culture of quality, timely harvesting, and meticulous post-harvest handling practices among all avocado farmers. This ensures produce meets export-grade standards from the farm gate.
- Collaboration and trust: Encourage greater collaboration and build trust among all actors within the avocado value chain. This will help reduce inefficiencies, improve collective bargaining power, and create a more cohesive and productive industry.

IMMEDIATE OPPORTUNITIES FOR UGANDA'S AVOCADO VALUE CHAIN

Uganda has several promising avenues for immediate growth within its avocado value chain:

- Fresh avocado exports: There's significant potential to boost exports of fresh avocados, particularly premium varieties like Hass. Success here hinges on consistently improving both quality and supply volume.
- Local processing for avocado oil: Developing local processing capabilities for avocado oil presents a strong opportunity to capture more value within Uganda, thereby reducing the current reliance on exporting raw produce.
- Cosmetics and pharmaceutical applications: Uganda can explore its competitive advantage by focusing on avocado-based products for the cosmetics and pharmaceutical sectors. These niche markets often offer higher returns due to significant value addition.

To ensure the success of Uganda's avocado value chain, a clear Plan of Action was developed. This section culminates in a detailed and costed PoA, structured around three strategic objectives and corresponding operational activities. These activities are sequenced over a three-year horizon and reflect a practical, prioritized roadmap to deliver on the ambitions set out in earlier sections. The PoA moves beyond generic recommendations, offering a set of targeted, actionable interventions–from expanding access to certified seedlings and improving GAP compliance to developing packhouse infrastructure and branding Ugandan avocados in export markets. This is the operational backbone of the Roadmap, ensuring that Uganda's avocado sector has not only a destination in sight but also a clear and credible path to reach it.

IMPLEMENTATION MANAGEMENT

The Avocado Sector Development Roadmap is not the roadmap of any specific institution; rather, it is the roadmap for Uganda – it is concerned with leveraging the avocado sector to contribute to overall economic growth in the country. Still, a roadmap is not enough to ensure the sector's sustainable development. Such development will require communication and coordination among various stakeholders in respect of different activities and proactive budget cycle planning. While the execution of these activities will allow the targets to be achieved, success will depend on the ability of stakeholders to plan and coordinate actions in a tactical manner. Accordingly, effective implementation will require:

- A high level of commitment from relevant stakeholders, both private and public sector;
- Systematic communication and coordination between implementing bodies;
- Readiness of the public and private sectors to allocate and mobilize resources.

SETTING UP THE GOVERNANCE FRAMEWORK

To achieve success and ensure the continuing viability of the Avocado Sector Development Roadmap, it is crucial to identify and create a reliable system that will facilitate its implementation. An effective mechanism to oversee and coordinate the execution of the roadmap will help clarify everyone's roles, make the best use of scarce resources, assign responsibilities and accountability, and promote transparency among public institutions and private-sector organizations. There is thus a pressing need to establish an ASP in Uganda to address the sector's specific requirements.

Enabled public-private collaboration – ASP

The ASP will require high-level involvement by trade and investment support network members (public and private). Their role is crucial and will impact the effectiveness with which the Roadmap is implemented. Likewise, the private sector's ability to provide inputs to the Roadmap implementation process will significantly influence its success.

The ASP'S main functions should be:

- Act as a consultative group pertaining to the avocado sector, enabling the private sector and government representatives to identify priority issues;
- Coordinate and monitor the Roadmap's implementation by the government, private sector, institutions or international organizations to ensure it is on track;
- Identify and recommend allocation of resources necessary for Roadmap implementation;
- Elaborate and recommend revisions and enhancements to the Roadmap so that it continues to best respond to the sector's current needs and long-term interests;
- Propose key policy changes to be undertaken based on Roadmap priorities, and promote these policy changes among national decision makers.

Resource mobilization

It is imperative to plan the required financial resources for implementation. Financial resources can come from a variety of sources – national budget, the domestic private sector, foreign private investment, local research institutes and think tanks, and development partners.

The most basic implementation cycle includes prioritizing and programming activities, identifying and mobilizing resources, implementing activities, tracking results and reporting. Lead implementing agencies are responsible for implementation and normally conduct resource mobilization planning with a one-year time-horizon. It is suggested that implementing institutions work in consultation with other relevant stakeholders to plan activity implementation based on agreed strategic priorities.

Tracking and reporting

Tracking and reporting are necessary to assess how Roadmap implementation is progressing. Tracking has a number of critical functions: to identify which planned activities, reforms and projects are receiving implementation support; to confirm if there are delays or gaps in implementation; and to highlight to key public and private stakeholders how planned interventions are yielding results in line with the strategic goals.

Measuring progress is essential not only to communicate results to stakeholders but also to build buy-in and momentum for strategic reforms, and plan resource mobilization and allocation based on emerging strategic needs. A tracking and reporting system must be planned from the start so that those involved know exactly what to assess right from the beginning.

Communication, outreach and advocacy

Building continuous stakeholder engagement throughout the design and implementation life cycle is vital for the Roadmap to remain a high priority for governments and for the private sector to stay engaged. Building ownership for implementation and results involves sensitizing a wide range of stakeholders from both the public and the private sector with proactive and regular communication.

Various stakeholders have a vested interest in the results of the prioritized activities. These include stakeholders who were involved in the design process, those who are responsible for managing and tracking results, and those who are implementing the Roadmap. All stakeholders need to be regularly informed of progress and results to maintain both support for the Roadmap and active engagement in planning, programming and implementing priority actions.

PLAN OF ACTION

The PoA presented in the section below responds to the vision by addressing the sector's constraints and by leveraging opportunities in a comprehensive manner through a robust, actionable and realistic set of activities.

The PoA is structured around the strategic objectives, agreed on with all sector stakeholders, and constitutes the essence of this Strategy.

The PoA is structured around three strategic objectives and associated operational objectives. For each objective, the PoA outlines detailed activities and their implementation modalities, which include:

Priority level: From the highest to the lowest. The highest-priority objectives are those that are most critical to the success of the sector and lay the foundation for all other actions.

Period: The desired time frame of the activity.

Targets: Quantifiable targets that allow completion monitoring of the activity during the implementation stage.

Leading implementing partner: One single accountable lead institution per activity. (The institution can also have a technical role or can solely have an oversight and coordination role).

Supporting implementing partners: Any institution that should be involved at any stage of the activity's implementation.

Budget: Required amount for action implementation in Ugandan shillings (UGX).


Photo: ITC

STRATEGIC OBJECTIVE 1: ENHANCE PRODUCTION, IMPROVE PRODUCTIVITY, AND PROMOTE VALUE ADDITION IN THE AVOCADO SECTOR

Operational objectives	Actions	Priority	Period			Targets	Leading implementing partner	Supporting implementing partners	Budget (UGX)
			25–26	26–27	27–28				
1.1. Increase access to high-yielding, certified and market-suited avocado seedlings	1.1.1. Jointly between the private and the public sector, evaluate and update the certification scheme for avocado seedling nursery operators.	High				Accreditation scheme promulgated and published	MAAIF – Department of Crop Inspection and Certification	• AAU • Uganda Avocado Farmers' Cooperative Union Ltd (AvoCoop) • National Avocado Federation of Uganda (NAFOU) • National Agricultural Research Organisation	100M
	1.1.2. Refine nursery production and management guidelines to reflect avocado specificities, and distribute to nurseries, ideally during a training and demonstration session.	Medium				Guideline updated and disseminated (online)	MAAIF – Department of Crop Production	• National Agricultural Research Organisation	150M
	1.1.3. Launch a national call for applications, and accredit new private nurseries in key avocado-growing regions in collaboration with private sector associations, using the newly approved accreditation scheme (see 1.1.1) and nursery production and management guidelines	High				At least 100 approved nurseries	MAAIF – Department of Crop Inspection and Certification	• AvoCoop • NAFOU • AAU	20M
	1.1.4. Conduct independent auditing of nursery performance against criteria set in the jointly approved accreditation scheme.	Medium				All accredited nurseries	MAAIF – Department of Crop Inspection and Certification	• MAAIF – Directorate of Agricultural Extension Services (DAES) • AAU • AvoCoop • NAFOU	150M
	1.1.5. Continue / maintain provision of Hass avocado seedlings from accredited nurseries over the next three years.	High				100,000 seedlings to be distributed	MAAIF – Department of Crop Production	• AvoCoop • NAFOU • AAU	1B
1.2. Develop new high-yielding varieties	1.2.1. Import high-yield avocado seedlings for research and select best mother stocks.	High				5-7 distinct high-yield, disease-resistant Hass avocado seedling varieties for research imported; By end of year 3 top 2-3 performing varieties suited to Uganda's conditions and export standards identified	National Crops Resources Research Institute	• MAAIF – Department of Crop Protection	200M
	1.2.2. Distribute annually a number of selected mother stock seedlings to nurseries for multiplication and propagation.	High				Year 1 (Pilot Phase): 25,000 - 50,000 selected mother stock seedlings distributed to a network of 5-10 certified private and public nurseries that meet established quality and phytosanitary standards; Double the distribution the following years	National Crops Resources Research Institute	• MAAIF – DAES	500M

Operational objectives	Actions	Priority	Period 25–26	26–27	27–28	Targets	Leading implementing partner	Supporting implementing partners	Budget (UGX)
1.2. Develop new high-yielding varieties	1.2.3. Establish cultivar trial planting blocks in five different regions to assess adaptability, yield performance and disease resistance.	Medium				Plant 100 trees per cultivar in each trial block	National Crops Resources Research Institute	• MAAIF – Department of Crop Production	500M
	1.2.4. Train nursery operators, extension workers and designated persons in farmer associations annually on the new mother stock, seedling multiplication, grafting, planting and disease control. Use identified demonstration centres or zonal agriculture research institutes, equipped with Hass mother nurseries for training, replenishing starter materials and manuals for nursery operators.	Medium				Train at least 200 nursery operators, extension workers, and representatives from farmer associations annually on new mother stock, seedling multiplication, grafting, planting, and disease control	MAAIF – Department of Crop Production	• MAAIF–- DAES • HortiFresh • AAU • AvoCoop • NAFOU	250M
	1.2.5. Promote the adoption of clonal technology for rootstocks resistant to Phytophthora (root disease), ensuring improved disease resistance and productivity	Low				Establish one demonstration site for resistance varieties at each Zonal Agricultural Research and Development Institutes	National Crops Resources Research Institute	• MAAIF - department of Crop Production • HortiFresh • AAU • AvoCoop • NAFOU	200M
1.3. Improve farm-level production and postharvest techniques	1.3.1. Adopt the draft orchard management manuals developed by NAADS, which are currently under consultation, as a standard reference for farmers and extension workers. Ensure the manuals are reviewed, validated and regularly updated to incorporate best practices and emerging research.	High				Orchard management manuals adopted as a standard reference for farmers and extension workers	MAAIF – DAES	• MAAIF – Department of Crop Production • HortiFresh • AAU • AvoCoop • NAFOU	200M
	1.3.2. Develop and standardize GAP for the avocado industry through stakeholder consultations, and adopt a GAP manual and guidelines for the Uganda avocado sector.	High				GAP manual and guidelines for the Uganda avocado sector adopted	MAAIF – DAES	• HortiFresh • AAU • AvoCoop • NAFOU	60M
	1.3.3. Distribute orchard management and GAP manuals through avocado associations / co-ops and extension services. Ideally, distribute some YouTube videos on GAP through social media to fast-track adoption of GAP practices.	High				Orchard management and GAP manuals distributed	MAAIF – DAES	• HortiFresh • AAU • AvoCoop • NAFOU	200M
	1.3.4. Develop a private-public sector joint effort to provide standardized basic and GAP training in avocado production best practices.	High				At least 1, 000 smallholder avocado farmers trained through public-private partnership for avocado	MAAIF–- DAES	• HortiFresh • AAU • AvoCoop • NAFOU	100M
	1.3.5. Promote the adoption of affordable, water-efficient irrigation systems – such as drip irrigation – by integrating practical training and support into Global GAP certification programmes, highlighting the direct impact of proper water management on fruit size and export quality.	High				At least 1,000 avocado farmers equipped with affordable water-efficient irrigation systems (e.g. drip irrigation) and provided with integrated training	MAAIF – DAES	• HortiFresh • AAU • AvoCoop • NAFOU	250M
1.4 Establish collection / demonstration sites	1.4.1. Through public-private partnerships, establish / scale up district-level (spokes) model zonal hubs near production areas for aggregation and technical services, linked to central hubs for collection and demonstrations. Partner with agri-tech firms to sponsor demo sites and provide access to quality inputs. Encourage cooperatives, associations and businesses to set up nearby collection centres, promoting shared facilities that enhance market access and quality control, and operate as sustainable business units.	High				By end of Year 3: Establish or scale up at least 6 district-level model zonal hubs near key avocado production areas, operating as public-private partnerships serving as a central point for aggregation and technical services	MAAIF – Department of Crop Production and DAES	• HortiFresh • AAU • AvoCoop • NAFOU	300M

Operational objectives	Actions	Priority	Period 25–26	Period 26–27	Period 27–28	Targets	Leading implementing partner	Supporting implementing partners	Budget (UGX)
1.4 Establish collection / demonstration sites	1.4.2. Deploy / use contract farming to formalize the hub and spoke model, and to distribute quality inputs (seedlings) and proper packaging material, backed by a sustainability plan and after-sales support for the seedlings.	Low				By end of Year 3 formalize contracts with at least 5,000 smallholder avocado farmers (linked to established hubs) through contract farming agreements	HortiFresh	• AAU • AvoCoop • NAFOU	150M
	1.4.3. Provide training for avocado growers and exporters on proper collection, packing and storage techniques, based on export market requirements.	Medium				At least 1,500 avocado growers and export company representatives trained on proper post-harvest handling, packing, and storage techniques; By end of Year 3, a 20% reduction in post-harvest losses among trained farmers achieved	Ministry of Trade, Industry and Cooperatives (MTIC) – Uganda Free Zones and Export Promotion Authority (UFZEPA)	• HortiFresh • Maersk	150M
	1.4.4. Review the requirement to purchase packaging materials from authorized Government of Uganda distributors, or assess and adjust their charges to ensure competitive pricing compared to imports.	Medium				Requirement to purchase packaging materials from authorized government distributors is eliminated	Uganda Revenue Authority	• HortiFresh Advocacy Task Force • Private Sector Foundation Uganda Agri Committee	20M
1.5. Increase value addition in the avocado sector	1.5.1. Establish a local training programme for avocado oil processors on Good Manufacturing Practices (GMP) to improve factory operations, food safety and handling.	Medium				A standardized local GMP training program for avocado oil processors designed and launched; At least 20 avocado oil processing personnel on GMP trained	MTIC – Uganda National Bureau of Standards	• MTIC	50M
	1.5.2. Train avocado farmers and cooperatives on postharvest triage techniques (part of GAP) to identify avocados unsuitable for export, and ensure these are directed to oil processing units.	High				At least 1,000 avocado farmers and cooperative members trained on post-harvest triage techniques for export-grade and processing-grade fruit	MAAIF – Department of Crop Production	• MAAIF – DAES • AAU • AvoCoop • NAFOU	300M
	1.5.3. Enforce the exemption of taxes on avocado oil processing machinery and spare parts (classified under Chapters 84 and 85 of the EAC Common External Tariff), ensuring no VAT is applied to these items.	High				No VAT applied for avocado oil processing machinery and spare parts	Uganda Revenue Authority	• HortiFresh Advocacy Task Force • Private Sector Foundation Uganda Agri Committee	10M
	1.5.4. Advocate for the elimination of VAT on avocado oil exports to enhance competitiveness.	High				No VAT applied to avocado oil for export	Uganda Revenue Authority	• HortiFresh Advocacy Task Force (includes MAAIF, MTIC and Agriculture Committee of Parliament, plus many private sector players) • Private Sector Foundation Uganda Agri Committee	10M

STRATEGIC OBJECTIVE 2: STRENGTHEN THE BUSINESS ENVIRONMENT FOR AVOCADO SECTOR GROWTH

Operational objectives	Actions	Priority	Period 25–26	Period 26–27	Period 27–28	Target	Leading implementing partner	Supporting implementing partners	Budget (UGX)
2.1 Improve coordination for the avocado sector	2.1.1. Organize quarterly meetings of the Uganda ASP to plan implementation of the Roadmap, adjust strategic orientations, and plan and programme annual activities.	High				Quarterly meetings of the ASP organized Meeting minutes distributed to ASP members	Secretariat of the ASP	• MAAIF	50M
	2.1.2. Prepare and publish an annual progress report on avocado sector development in Uganda.	Low				Annual progress report on avocado sector development published	Secretariat of the ASP	• MAAIF	5M
2.2. Improve data collection on the sector	2.2.1. Include avocado as a stand-alone horticulture crop in the annual agriculture survey of Uganda, capturing data on the number of trees, yield per tree, exports and number of exporters.	High				Avocado included as a stand-alone horticulture crop in the annual agriculture survey	MAAIF– Department of Agricultural Planning and Development, Statistics Division	• Uganda Bureau of Statistics • Uganda Revenue Authority • Economic Policy Research Centre • Bank of Uganda • National Information Technology Authority	20M
	2.2.2. Develop a private-sector-led register of avocado farmers to track the number of avocado producers (explore opportunities of existing data collection by the private sector, e.g. HortiFresh platform current data collection for other crops).	Medium				A comprehensive, private-sector-led digital register of avocado farmers established and annually updated	MAAIF– Department of Agricultural Planning and Development, Statistics Division	• HortiFresh (to implement) • AAU • AvoCoop • NAFOU	400M
	2.2.3. Set up a private-sector-led data-collection system on yield, acreage and production through the avocado associations and cooperatives.	Low				Standardized data-collection system for avocado yield, acreage, and production established	MAAIF– Department of Agricultural Planning and Development, Statistics Division	• HortiFresh (to implement) • AAU • AvoCoop • NAFOU	250M
2.3. Attract quality investment in key areas of the value chain (packaging, cold chain, etc.)	2.3.1. Attract investment in cold storage, packaging facilities and avocado collection hubs in key production regions with high volumes.	High				Year 1: Cooling collection centres in key production areas Year 2: Packhouse facilities established	Ministry of Finance, Planning and Economic Development – Uganda Investment Authority (+ MTIC)	• HortiFresh • AAU • AvoCoop • NAFOU • UFZEPA Presidential Advisory Committee on Exports and Industrial Development (PACEID) • MAAIF • Uganda Bankers' Association	800M
	2.3.2. Attract investment to modernize and upgrade existing packhouses and cold storage facilities, enhancing their machinery and infrastructure to improve functionality and ensure compliance with export standards.	Medium				At least 2 big projected initiated for the modernization and upgrade of avocado packhouses and cold storage facilities.	Ministry of Finance, Planning and Economic Development – Uganda Investment Authority (+ MTIC)	• HortiFresh • AAU • AvoCoop • NAFOU • UFZEPA PACEID • MAAIF	550M

STRATEGIC OBJECTIVE 3: EXPAND MARKET ACCESS AND PROMOTE UGANDAN AVOCADOS TO INCREASE EXPORTS

Operational objectives	Actions	Priority	Period 25–26	Period 26–27	Period 27–28	Target	Leading implementing partner	Supporting implementing partners	Budget (UGX)
3.1. Consolidate market development efforts	3.1.1. Create a national avocado consortium, building on existing private sector initiatives, e.g. associations and large farms (possibly a Special Purpose Vehicle) for collective representation in international markets under a common Uganda brand (like Zespri for kiwifruit of New Zealand), as well as improve aggregation, supply consistency and distribution.	High				A national avocado consortium created	MTIC – UFZEPA	• MAAIF • HortiFresh • AAU • AvoCoop • NAFOU • PACEID • Ministry of Foreign Affairs • ASP	100M
	3.1.2 Develop priority market entry plans for: • EU • Gulf Cooperation Council • Regional EAC and other African countries.	Medium				Priority market entry plans developed for key destinations	MTIC – UFZEPA	• HortiFresh • AAU • AvoCoop • NAFOU • PACEID	30M
	3.1.3. In line with market orientation, consortium representatives to participate in targeted trade fairs in Europe – Fruit Logistica (Germany), Salon International de Agriculture (Paris), or others.	Medium				Consortium representatives' participation in one EU trade fair annually	MTIC – UFZEPA	• HortiFresh • AAU • AvoCoop • NAFOU • PACEID	150M
	3.1.4. In line with market orientation, consortium representatives to participate in Gulfood (UAE)	Medium				Consortium representatives' participation in Gulfood annually	MTIC – UFZEPA	• HortiFresh • AAU • AvoCoop • NAFOU • PACEID	150M
	3.1.5. In line with market orientation, consortium representatives to participate in the Avocado Africa Summit.	Medium				Consortium representatives' participation in Avocado Africa Summit annually	MTIC – UFZEPA	• HortiFresh • AAU • AvoCoop • NAFOU • PACEID	150M
3.2. Increase overseas promotion of Ugandan avocados	3.2.1 Develop a comprehensive branding strategy for Hass avocados from Uganda.	Low				Branding strategy for Hass avocados from Uganda is developed	MTIC – UFZEPA	• HortiFresh • AAU • AvoCoop • NAFOU • PACEID • Ministry of Foreign Affairs • ASP • Ministry of EAC Affairs • Uganda National Bureau of Standards	180M

Operational objectives	Actions	Priority	Period			Target	Leading implementing partner	Supporting implementing partners	Budget (UGX)
			25–26	26–27	27–28				
3.2. Increase overseas promotion of Ugandan avocados	3.2.2. Launch and actively promote the newly designed national brand for Ugandan Hass avocados in key international markets. Collaborate with trade attachés, embassies and export promotion bodies (e.g. MTIC) to build brand recognition through targeted marketing campaigns and digital outreach.	Low				The newly designed national brand for Ugandan Hass avocados promoted	MTIC – UFZEPA	• HortiFresh • AAU • AvoCoop • NAFOU • PACEID • Ministry of Foreign Affairs • ASP • Ministry of EAC Affairs	100M
	3.2.3. Train Ugandan exhibitors on pre-exhibition preparation and planning. Benchmark leading companies at exhibitions to gain insights.	Medium				At least 10 exhibitors trained per year	MTIC – UFZEPA	• HortiFresh • AAU • AvoCoop • NAFOU	30M

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ANNEXES

ANNEX I: TRADE AND INVESTMENT SUPPORT NETWORK

A trade and investment support network comprises a wide range of institutions that collectively support, or have a bearing on, a country's trade and investment performance, directly or indirectly. These institutions can be grouped into four main categories based on their roles and areas of focus: the policy support network, the trade services network, the business services network, and the civil society network. Together, these networks form the backbone of national trade strategies and contribute to enhancing the country's economic competitiveness.

Recent policy developments by the Ugandan Parliament aim to streamline agricultural operations and improve service delivery. In October 2024, Parliament passed a series of Bills that merge three key agencies – the Cotton Development Organization, Dairy Development Authority and NAADS – into MAAIF. This rationalization initiative is designed to eliminate overlapping roles, reduce duplication of services, and enhance efficiency within the agricultural sector. Specifically, the NAADS (Amendment) Bill, 2024, dissolves NAADS and transfers its functions to DAES under MAAIF.

According to Agriculture Minister Tumwebaze, this restructuring will address the inefficiencies caused by overlapping responsibilities between NAADS coordinators and traditional agricultural extension officers (Parliament of the Republic of Uganda, 2024).

THE TRADE AND INVESTMENT SUPPORT NETWORK SUPPORTING THE AVOCADO SECTOR IN UGANDA

Policy support network:
 	
Ministries and authorities responsible for shaping national policies that influence trade and investment activities.
	• MAAIF:
	  – Department of Crop Resources
	  – DAES
	• MTIC (Department of External Trade)
	• National Agricultural Research Organisation, National Crop Resources Research Institute
	• National Agricultural Research Organisation, National Forestry Resources Research Institute
	• PACEID
	• Ministry of Finance, Planning and Economic Development
	• Horticultural Exporters Association of Uganda
	• Uganda Free Zones and Export Promotion Authority
	• Uganda Investment Authority

Enterprise growth network: **Institutions that provide strategic and operational support to enterprises, helping them expand into new markets and improve trade capacity.**	• AvoCoop • NAFOU • AAU • HortiFresh • Uganda Agribusiness Alliance • Uganda Fruit and Vegetable Exporters and Processors Association
Commercial services network: **Commercial service providers and their associations that facilitate the operational side of trade, such as financing, logistics, insurance and packaging**.	• Commercial banks: Stanbic Bank Uganda Limited, Centenary Rural Development Bank Limited, Standard Chartered Bank Uganda Limited, Post Bank Uganda limited • Insurance companies: UAP Old Mutual Insurance Uganda Limited, Sanlam General Insurance Uganda Limited, Jubilee Insurance Company of Uganda • Freight forwarders: Bolloré Logistics Uganda, Spedag Interfreight Uganda, Kenfreight Uganda Limited
Civil society network: **Institutions that, while not explicitly focused on trade, have a significant influence on the country's export potential and broader socioeconomic development**.	• Development Network of Indigenous Voluntary Associations • Uganda National NGO Forum

The avocado sector in Uganda is characterized by a fragmented and diverse landscape, with multiple associations and cooperatives involved, each playing a unique role in the growth and development of the industry but lacking a unified structure to coordinate efforts. These organizations vary in size and scope, with some having a more concentrated membership, while others represent a broader base of farmers. For instance, the AAU currently has 30 active farmer members. In contrast, AvoCoop has a significantly larger membership base of around 400 farmers, while NAFOU represents several hundred additional farmers, further diversifying the sector's organizational landscape.

Beyond these groups, other associations also play a role in the broader horticultural and agribusiness ecosystem, with varying degrees of involvement in the avocado sector. For instance, HortiFresh works on supporting fresh produce exports, while the Uganda Agribusiness Alliance and the Uganda Fruit and Vegetable Exporters and Processors Association contribute to the development of value chains and market links. Despite their contributions, these organizations tend to operate independently, often with minimal coordination, which exacerbates the fragmentation within the sector.

The lack of a centralized platform or framework to unify these various players significantly limits the sector's ability to coordinate efforts, advocate for farmer needs and mobilize resources effectively. While each association and organization has its strengths, the absence of a collective structure hinders the sector's potential for sustainable growth and competitiveness – challenges also observed in other high-potential sectors like vanilla and cocoa. Establishing an ASP, as well as an Avocado Exporters Association or a broader Uganda Avocado Board – with inclusive representation from key stakeholders such as MAAIF, NAADS, cooperatives, development partners, shipping lines and airlines, relevant sectoral associations, the Uganda Revenue Authority, PACEID, and the Uganda Export Promotion Board – is strongly supported by industry players.

ANNEX II: UGANDA AVOCADO SECTOR PLATFORM TERMS OF REFERENCE

RATIONALE

Uganda has strong potential to become a major avocado producer and exporter due to its ideal growing conditions, rising global demand, and increasing access to regional and international markets. Expanding avocado production can boost smallholder incomes, generate employment along the value chain, and diversify Uganda's agricultural exports.

The ASP in Uganda will facilitate better coordination and implementation of avocado value chain development in Uganda. It will enhance the sector's competitiveness, drive economic growth and ensure alignment with the country's broader goals and policy structures.

MANDATE

The Uganda ASP is expected to provide an engaging environment for formulating mutually acceptable proposals and making implementation of sector development interventions more efficient. The Uganda ASP members will work together to:

- Create a shared understanding of key market challenges and opportunities facing the industry.
- Set goals and targets that, if achieved, will strengthen the sector's competitive position and enhance Uganda's overall capacity to meet changing market requirements.
- Propose key policy changes to be undertaken and promote these proposed changes among policymakers.
- Support alignment to industry goals and the targets of government, private sector and partner institution programmes and projects.
- Establish annual key performance indicators to drive collective accountability and performance.

COMPOSITION, ELIGIBILITY AND GOVERNANCE

The members of the ASP provide valuable input to guide the government's trade and export development agenda, helping to enhance economic opportunities for Uganda's private sector and society.

- The ASP should consist of a maximum of 13–15 members, drawn largely from the private sector and key public sector institutions, ensuring an odd total number to allow for decisive voting.
- Members are nominated by the public and private sectors to represent their industry interests based on their expertise in the avocado sector. Consideration will be given to achieving balanced representation among product lines, and small, medium and large firms. Every effort will be made to maintain balanced industry representation in the appointment of members, including regional representation. The Uganda ASP should ensure balanced regional representation, fostering inclusivity and collaboration across all key geographical areas to address sector priorities effectively.
- Members' terms will cover an initial period of three (3) years, and members may be re-elected once.
- Appointments are made at the establishment of the ASP, and periodically throughout the duration of the ASP, subject to any change in the members' representation and needs.
- The ASP has the delegated authority to replace an existing member if they can no longer perform their function or are not fully committed.
- Membership of the sector platform shall be honorary, with no financial benefits. Members shall not be entitled to any renumeration for attending meetings.
- The ASP may benefit from the participation and expertise of individuals who are not formal members. As appropriate, private, public and/or international sector experts may be invited to attend ASP meetings.

MEMBERS VERSUS ALTERNATES

ASP members, serving in an individual capacity, are selected based on their individual qualifications. Therefore, alternates shall not be designated to serve in a members' place or to represent a member in meetings or other committee activities.

Public sector institution members of the platform recommending or designating their representatives to serve in a committee in a representative capacity may designate an alternate member. Alternates may be designated, if confirmed to the Secretariat by the head of the public sector institution of the member.

CHAIR AND VICE-CHAIR

The sector platform shall have a Chair and a Vice-Chair who shall be nominated by the members:

a. Ideally, the Chair should be from the private sector, and the Vice-Chair from the Government.
b. Given the Chairs' continuing and broad responsibilities, the members elected as Chairs should be individuals whose:
   » expertise and interests reflect the development of the industry for the benefit of Uganda;
   » schedules will permit them to attend and steer the meetings.
c. The Chair shall:
   » Preside over the ASP meetings;
   » Certify the accuracy of the minutes of the meetings;
   » Facilitate consensus among members while ensuring that dissenting or divergent views are fairly included in formal advice;
   » Represent ASP views in various forums.

SUBGROUPS, WORKING GROUPS AND OBSERVERS

The Uganda ASP reserves the right to create working groups to pursue the priorities identified by its members. These working groups will report to the ASP to inform on progress achieved, gain agreement and solicit direction for future work.

MEETINGS

a. The sector platform shall meet in ordinary session once every three months. In addition, an extraordinary session may be convened by the Chair when required.
b. Decisions in the meetings shall be made by simple majority.
c. The quorum for each ASP meeting will be 60% of members. At least the Chair or Vice-Chair and the Secretariat are present for each meeting.

AGENDA

The Chair of the Uganda ASP shall finalize the agenda of each meeting based on the recommendations of the members. Members can suggest items for inclusion on the agenda by sending them in writing to the Chair at least two weeks ahead of a meeting, or by suggestion at the end of a meeting. Copies of the agenda and related technical papers shall be made available at least seven days in advance of a meeting to members of the ASP.

REPORTING, PROCEEDINGS AND CONFIDENTIALITY

a. The Uganda ASP members agree to hold each other mutually accountable for the achievement of results. Individual members will report to the ASP as a whole on the status of agreed actions.
b. Members agree that unless otherwise indicated (e.g. organizational commitments to agree upon action items), individual statements will not be construed or represented as an official position of any institution.
c. Any reports or research projects developed for the ASP, and under discussion and/or review by the ASP or one of its working groups, are to be considered drafts. Those documents are not to be distributed until a final version is approved for distribution by the Chair.
d. An approved version of ASP meeting minutes and approved versions of reports and/or position papers will be shared with relevant national public and private institutions.

SECRETARIAT

MAAIF shall collaborate with the private sector to establish a secretariat to support the ASP's business, organization, and execution of its powers and duties, creating momentum for the ASP's success. The secretariat is ideally to be managed by a private sector organization working actively in the avocado sector. It is recommended that MAAIF and the organization selected to serve as secretariat establish a formal collaboration with performance indicators. The performance of the organization selected to serve as secretariat will be assessed every three years and a new secretariat can be appointed by the Ministry.

The secretariat is responsible for organizing meetings, keeping meeting minutes and archiving ASP decisions, reports and archives, in particular:

1. Maintain the following records and reports:
    1.1. Detailed minutes of meetings, indicating date / place of meetings, list of attendees with title / designation, detailed description of the subjects discussed and resolution, and a certification of the accuracy of the minutes by the Chair.
    1.2. Copies of reports and documents received or issued by the ASP.
2. Ensure administrative processes mentioned in these Terms of Reference, or any related law / act are duly followed.
3. Ensure the decisions of the ASP are followed up on, and substantive aspects of the work are moving forward.

ANNEX III: LIST OF PARTICIPANTS IN THE PUBLIC-PRIVATE CONSULTATIONS

No.	Name of institution	Name
1	AAU	Theo Chiyoka
2	AFROKAI	Narcis Tumushabe
3	Agricado Farms	Aliya Hajee
4	Agricado Farms	Amina Hudaya
5	Avolio Industries	Omar Ababneh
6	Avolio Industries	Peace Aliru
7	Avolio Industries	Lorna Nahwera
8	Avotein Farms Ltd	Hani Dalan
9	Balaji Group (SA) Ltd	Charles Mutuku
10	Balaji Group (SA) Ltd	Kenneth Ntegyereize
11	Biosyntec Ug	Florian Knaus
12	Curated Holdings	Bakali Mukasa
13	Curated Holdings	Faridah Najjuma
14	EUD	Alain Castermans
15	Hass Avocado Farmers Association/Uganda Agribusiness Alliance	Hon. Victoria Sekitoleko
16	HORTEXA	Florence Nakito
17	HORTEXA	Roman Ssewagudde
18	Hortifresh	Joshua Baguma
19	Hortifresh	Prisca Beesigomwe
20	HortiFresh	Fred Zake
21	Kabale Mc	Abel Atwine
22	MAAIF	Josephine Amonding
23	MAAIF	Peter Dhamuzungu
24	MAAIF	Alex Lwakuba
25	MAAIF	Monica Nakidde
26	MAAIF	Richard Ssebowa Adoniya
27	MAAIF	Nicholas Tugume
28	MAAIF/DCP	Denis Ekonga
29	MAAIF/Directorate of Extension	Dr. Angela Namyenya
30	MAAIF/Directorate of Extension – ex NAADS	Grace Fatuma Kayigati
31	MAAIF/External Trade Department Commissioner & COMESA focal point	Cleophas Ndoriere
32	MAERSK	Flavia Kyomugendo Gloria
33	MAERSK	Eric Ochen
34	MARKUP II - Uganda	Doreen Ahebwa
	MARKUP II - Uganda	Juliet Musoke
35	MEACA	Etedu Matia
36	MEACA	Sam Musige
37	MFPED & PSDU	Emalyn Kamusiime
38	Morther Earth International	Aisha Nanziri
39	Musubi Farms	Salma Namakula

No.	Name of institution	Name
40	NACORI	Sonia Mbabazi
41	NACORI	Hamphrey Niweturuho
42	NAFOU	Alphose Akankwasa
43	NAFOU	Alfred Kiiza
44	NAFOU	David Muhumuza
45	NAFOU	Richard Welishe
46	NARO - NACORI	Gabriel Ddamulira
47	NARO - NACORI	Sarah Mutonyi
48	NPA	Ronald Kaggwa
49	NPA	Isreal Mugezi
50	Partners in Food Solution	Robert Mawanda
51	QAAUL	Elliot Baligeya
52	Real IPM U	Paul Sigombe
53	SOLIDARIDAD	Noreen Birungi
54	SOLIDARIDAD	David Kyeyune
55	TRADE MARK	Anna Namboze
56	UCDA	Mercy Hashaka
57	UCDA	Willy Nelson Kisenyi
58	UFVEPA	Hasifah Tushabe
59	UFZEPA	Sam Karuhanga
60	Uganda Agribusiness Alliance	Steve Hodges
61	Uganda Agribusiness Alliance	Augustine Mwendya
62	Uganda Avocado Farmers Coop Union	Stephen K Kimpwedde
63	UIA	Hope Waima
64	UNBS	Antoniov Semakula

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HORTEXA

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