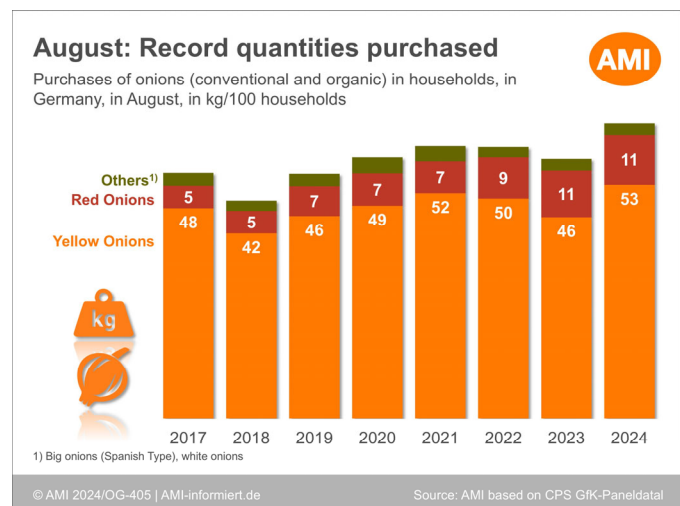


Germany | Market situation

In Germany, the market situation for onions appears to be stabilizing. With demand remaining steady, prices have leveled off. Depending on the region and availability, average prices of between 17.00 and 20.00 EUR/100 kg in big bags ex station are still being quoted. Higher prices can still be achieved regionally for large calibres that are in high demand. With brisk demand, prices for red onions are holding steady at between 35.00 and 40.00 EUR/100 kg ex station. Here too, higher prices can be achieved for larger calibres. Demand from Eastern Europe remains high.

This year in August more onions were bought than in the previous year

In contrast to the previous year, this year summer returned in August throughout Germany. The weather conditions favored the harvesting and processing work. There was a smooth transition from set onions to summer sown onions. Last season, August was characterized by extreme weather changes and the season started later than this year. As a result, supply was limited in 2023 and prices were high, which was also reflected in consumer spending and consumption. According to an AMI analysis of the CPS GfK household panel data, private households in Germany bought almost 14 % more onions in total last month than in August 2023. Purchases increased in comparison to August last year, particularly for yellow onions (+17 %), but also for red onions (+8 %). Given the significant drop in consumer prices, the increase in purchases is not unusual. On average, consumers spent 1.41 EUR/kg on yellow onions last month. This represents a year-on-year reduction of around 20 %. In contrast, red onions recorded a more moderate price decline. At an average of 2.41 EUR/kg, spending in August this year was only around 2 % below the previous year's level.



Netherlands | Market situation

In the Netherlands, demand remains constant at a satisfactory level. The export business is continuing as planned. Prices have fallen slightly due to the supply, but the onion market is stabilizing noticeably. This week, prices for yellow summer sown onions graded 60/80 mm are between 21.00 and 22.00 EUR/100 kg ex station, while prices for medium onions (50/70 mm) are quoted at between 18.00 and 19.00 EUR/100 kg. Red onions have also decreased slightly in price. Prices of around 26.00 EUR/100 kg ex station are being quoted for 40/60 mm graded onions. Large onions are still in demand and can achieve significantly higher prices. Prices for the 50/70 mm grading are around 35.00 EUR/100 kg and for the 60/80 mm grading they are around 48.00 EUR/100 kg ex station.

On the regional exchanges in the Netherlands, onion prices for small caliber onions, which are delivered from the field, remained stable last week, with yellow onions with a 30-60% share of large onions quoted in the price range between 8.00 and 10.00 EUR/100 kg. Prices for onions of the same size, which are sold ex warehouse, decreased slightly at the lower end of the range and were between 10.00 to 12.00 EUR/100 kg. Prices for summer sown onions with a proportion of large onions >60 %, which were delivered from the field, were between 10.00 and 11.00 EUR/100 kg. For onions of the same size, which are sold ex warehouse, the upper end of the range firmed slightly, so that prices were between 12.00 and 15.00 EUR/100 kg. Last week, Middenmeer listed a grading for summer sown onions with a proportion of large onions <30%, with prices ranging between 9.00 and 12.00 EUR/100 kg. There was no differentiation by size in the price quotations in Goes. The prices for summer sown onions, which are delivered from the

field, were between 10.00 and 12.00 EUR/100 kg. From storage, the upper end of the range firmed up, so that prices for summer sown onions were quoted between 12.00 and 15.00 EUR/100 kg. Yesterday, the exchange in Goes quoted prices for summer sown onions ex warehouse between 11.00 and 15.00 EUR/100 kg.

Prices for red onions with a 30-60 % share of large onions have firmed up again at the upper end of the range and were sold last week between 17.00 and 24.00 EUR/100 kg. Red onions (>60 %) have also firmed up and were priced between 20.00 and 25.00 EUR/100 kg. In yesterday's price quotation in Goes, prices for red summer sown onions (without grading) were between 22.00 and 24.00 EUR/100 kg.

Dutch exports

According to preliminary figures from KCB and GroentenFruit Huis, the Netherlands exported a total of around 30,039 t of onions in calendar week 36. This represents a 28 % increase in exports compared to the week before. The most important export destination continued to be Senegal, where around 6,604 t of onions were delivered. Compared to the week before, this represents an increase of 58 %. The Ivory Coast remained in second place with 3,307 t (-10 %), followed by the export destinations Israel with 2,938 t (+144 %) and Belgium with 2,661 t (+299 %). At around 188,992 t, total exports in the current season (week 27 to 36) are just 5 % below the previous year's level.

EU | Market situation

The onion harvest in Lower **Austria** is now almost complete and there is only a small amount left in the fields. The high soil moisture of the past few weeks did not provide optimal conditions for storage. The quality of the onions therefore varies widely. Onions are readily available depending on the season. While domestic sales are stable, demand for exports is increasing. The producer price level remains unchanged. At the beginning of the week, prices for medium onions, cleaned and sorted in crates, were mostly between 20.00 and 23.00 EUR/100 kg, depending on quality. Significantly less is being paid for small calibre onions and more for large calibre onions.

Frequent rainfall continues to affect the storage of onions in **France**. Around 20 % of the onions are still remaining on the field. It is uncertain whether the remaining quantities can be fully stored due to the wet weather. There are increasing reports of bacterial infestation. Due to the quality, the producer prices for yellow summer sown onions have fallen and are between 16.00 - 20.00 EUR/100 kg. Red summer sown onions are sold for 50.00 to 65.00 EUR/100 kg. Prices for yellow onions delivered to retailers continue to average between 75.00 and 90.00 EUR/100 kg, depending on size. Prices for red onions sold to the retail trade remain unchanged at between 150.00 and 160.00 EUR/100 kg.

According to fresh-market.pl, at the beginning of the current week onion prices in **Poland** have remained stable compared to the previous week and are still between 100.00 and 140.00 PLN/100 kg (EUR 23.40 - 32.70/100 kg) for bagged onions.

Prices for **Spanish** onions of the Grano variety remain stable in the current calendar week 41 at 21.00 EUR/100 kg (ex station, size 2/3 in 25 kg bags) and are 63 % below the previous year's price.

UK | Market situation

The recent rainy weather has brought the harvest to a temporary standstill in some areas. Nevertheless, it is hoped that the harvest can be completed in the upcoming weeks, if the weather conditions are favourable. The marketing of set onion is progressing. There are problems in some batches, but the condition of the onions overall is good.