

### Germany | Market situation

Household demand for onions has calmed down somewhat. With a purchasing coverage of 9.8, the high level of the previous year was missed last week. However, the number of buying households remains above average compared to previous years. Three promotions with 5kg nets are noticeable in the current week. Netto Markendiscounter advertises onions in 5kg nets at 1.99 EUR/5kg only on Saturday. Markant and Famila Ost advertise 5kg nets at prices of 2.99 EUR/2kg. 1kg nets are advertised at prices of 0.49-0.66 EUR/kg.

Prices for sorted onions are mostly unchanged. Currently, prices around 16.00 EUR/100 kg in big bags ex station are reported for sorted yellow onions sold on the domestic market. For red onions in stable quality, the prices are mainly around 30.00 EUR/100 kg in big bags ex station.

### Stocks as of 1 October with high share of long-term storage

The survey of onion stocks is almost complete. In total, the stocks of conventionally produced onions collected by AMI reached a quantity of just below 240,000 t as of 1 October, an increase of about 10 % compared to the previous year. Once again, only companies that had reported their storage quantities in both years were compared. Thus, in terms of volume, the stocks are at about the same level as in 2017, although the share of long-term stocks was significantly lower then.

The increase in volume compared to the previous year is mainly attributable to the eastern federal states. The strong increase in storage quantities there is mainly due to the fact that after 3 years of drought-limited yields, normal, average quantities were harvested again. Thus, storage quantities now are comparable to those that were quite common before 2018. In North Rhine-Westphalia, quantities from the previous year were recorded in storage, although lower yields were reported in many areas, including yield losses due to downy mildew. In addition, there were areas in the southern Rhineland that were lost due to the severe heavy rainfall in July. On the other hand, there was a lack of strong sales opportunities for field produce to the Netherlands, compared to the previous year, so that these onions were available for storage this year. Late ripening is again reported from Lower Saxony. The share of onions which are still in the field is about 13 % in Lower Saxony, compared to 17 % in the previous year.

**Onion-stocks (conventional) in Germany at October 1st in tons**

	2019	2020	+/- 2019%	Field	Normal store	Cold store	Condens. store	CA- store
<b>aggregate onions</b>	<b>218,477</b>	<b>239,826</b>	<b>10</b>	<b>18,695</b>	<b>163,981</b>	<b>30,225</b>	<b>9,250</b>	<b>17,675</b>
<i>in</i>								
North of Germany	74,515	75,380	1	9,200	40,225	10,000	1,480	14,475
North-Rhine-Westphalia	24,670	25,135	2	0,875	17,160	5,300	1,800	0
Southwest	50,547	55,190	9	0,150	43,900	3,890	5,250	2,000
Bavaria	31,200	29,890	-4	2,950	25,740	1,200	0	0
Former East German f. states	37,545	54,231	44	5,520	36,956	9,835	0,720	1,200
Agregate brown onions	200,791	217,421	8	15,275	150,986	27,285	8,300	15,575
Agregate red onions	17,686	22,405	27	3,420	12,995	2,940	0,950	2,100

source: AMI

The cold spring and the wet conditions in many areas during the summer have not always been good for the development of the onion crop. Even though problematic lots have already been removed in many areas, concerns about quality are being expressed regionally. Higher sorting losses could ultimately reduce the quantity of marketable onions more significantly than in other years. This is especially true for the more sensitive red onions.

Overall, however, the assumptions made so far regarding the harvest are confirmed. The larger quantity is mainly due to the expansion of the area by at least 10 %. The yields are not high, despite mostly sufficient water supply. The crops were slow to cope with the cold spring and the low temperatures as late as May.

With almost 50 % of the stored onions, the share of MH-treated onions has increased compared to the previous year. The sizing results in a lower share of large onions. In the case of yellow onions, 4 % of the onions are graded smaller than 40 mm, about 11 % are larger than 70 mm.

### **Netherlands | Market situation**

In the Netherlands, export volumes are below the processing capacities. In part, demand fluctuates in the countries of destination, for example in Nicaragua or in some Asian countries. On the other hand, the lack of container availability might limit export sales. Prices for sorted yellow onions (middled sized and 60/80mm) are quoted around 17.00 EUR/100 kg in bulk ex station, for big caliber up to 18.00 EUR/100kg.

Last week, prices on the regional quotation committees rose only minimally. Last week, the prices for yellow onions ex store were noted at 10.00-12.00 EUR/100 kg ex store. For red onions ex-store Emmeloord quoted prices at 18.00-20.00 (30-60 % big caliber) and 22.00-24.00 EUR/100 kg (>60% large caliber).

In yesterday's quotation in Goes, prices for yellow onions ex-store remained stable at 11.00-12.00 EUR/100 kg. For red onions ex field with a share of big calibers above 60%, prices were stable at 22.00-25.00 EUR/100 kg ex-field.

### **Dutch Exports**

Onion exports fell again slightly in week 38 compared to the previous week. According to preliminary data from KCB/GroentenFruit Huis, a total of 30,469 t of onions were exported from the Netherlands in the 38th week. The most important buyer in the 38th week was Senegal with 4,209 tonnes. This was followed by Côte d'Ivoire (3,672 t), Nicaragua (3,516 t), Great Britain (2,112 t), Malaysia (2,026 t) and Mali (1,656 t).

### **EU | Market situation**

The **Austrian** onion harvest is finished and the onions are in storage. Domestic sales are steady and quiet. There are slight signs of a revival in exports, but without any price effect. On the whole, the producer prices of the previous week were continued. For onions, sorted in the box, mostly prices of 16.00 to 19.00 EUR/100kg were reported at the beginning of the week, depending on quality and size. For weaker quality onions, prices were sometimes lower.

In **France**, prices in sales to the supermarkets increased. Producer prices are stable at 14.00 EUR/100 kg ex station. Retail sales prices range from 30.00-33.00 (40/60mm), 32.00-36.00 (50/70mm) and 34.00-37.00 (70mm+) EUR/100 kg for packed onions in 5kg nets.

In **Poland**, prices have decreased slightly. The selling prices at the wholesale markets are at 70.00-110.00 PLN/100 kg (15.00 to 24.00 EUR/100 kg) for sorted onions packed in bags, according to fresh-market.pl.

In **Spain**, prices have decreased. The prices for onions of the Grano variety are at 20.00 EUR/100 kg (ex station, size no. 2/3 in 25kg bag) in the current week.

### **UK | Market situation**

The UK harvest is estimated to be 85-90% complete. The remaining areas are from heavier land where even a small amount of rain can delay harvest for 48 hours. A lot of the remaining crops are still upright and not falling down.

Fusarium levels are predicted to be very high, losses at harvest are significant, lack of staff available to grade into store mean that high losses ex store are inevitable.

Sales through September and the beginning of October were static for onions (as well as all vegetable products), which has led to frustration for those trying to move sets quickly to refill stores with drilled onions or potatoes.