

AMI *MARKET* Report

Onions 2022



Facts for Decisions.



AMI MARKET REPORT ONIONS 2022

Trends in Production and Trade for Europe and the World

Imprint

Authors

Dr. Hans-Christoph Behr

Sonja Illert

Eva Würtenberger

Publisher

Agrarmarkt Informations-Gesellschaft mbH

Dreizehnmorgenweg 10

53175 Bonn

Tel. +49 (0) 228 33 80 5-250 | Fax +49 (0) 228 33 80 5-592

E-Mail: info@AMI-informiert.de | Internet: www.AMI-informiert.de

© AMI GmbH 02/2022

Market information has been produced with the utmost care. No liability is accepted. Copies and analysis only after priori is given.

Table of Contents

| | |
|-----------------------------|-----------|
| Impressum | 2 |
| Index of Figures | 5 |
| Index of Tables | 8 |
| 1. Europe | 9 |
| 1.1 Netherlands | 19 |
| 1.2 Germany | 26 |
| 1.3 Austria | 37 |
| 1.4 France | 39 |
| 1.5 Belgium | 41 |
| 1.6 United Kingdom | 42 |
| 1.7 Scandinavia | 44 |
| 1.8 Spain | 46 |
| 1.9 Italy, Portugal, Greece | 50 |
| 1.10 Poland | 51 |
| 1.11 Ukraine and Russia | 53 |
| 1.12 Turkey | 55 |
| 2. Asia | 57 |
| 2.1 India | 57 |
| 2.2 China | 61 |
| 2.3 Pakistan | 62 |
| 2.4 Japan | 63 |
| 2.5 Malaysia | 64 |
| 3. North America | 66 |
| 3.1 USA | 66 |
| 3.2 Canada | 68 |
| 4. Latin America | 70 |
| 4.1 Mexico | 70 |
| 4.2 Peru | 71 |
| 4.3 Brazil | 72 |

Table of Contents

| | | |
|-----------|--------------------------------|-----------|
| 4.4 | Argentina | 76 |
| 4.5 | Paraguay and Uruguay | 77 |
| 4.6 | Chile | 78 |
| 4.7 | Other Latin American Countries | 79 |
| 5. | Oceania | 80 |
| 5.1 | New Zealand | 80 |
| 5.2 | Australia | 82 |
| 6. | Africa | 83 |
| 6.1 | South Africa | 83 |
| 6.2 | Senegal | 83 |
| 6.3 | Ivory Coast | 85 |
| 6.4 | Egypt | 86 |

Index of Figures

| | |
|--|----|
| Figure 1: Crop area in the EU mainly increasing | 9 |
| Figure 2: Crop area has increased | 10 |
| Figure 3: Record production due to higher area | 10 |
| Figure 4: Increase of overwintered onions in Poland | 12 |
| Figure 5: High production of spring sets in NL | 13 |
| Figure 6: Less medium sized onions 2021 | 14 |
| Figure 7: Lack of big onions in the Netherlands | 14 |
| Figure 8: Spain: More bigger onions available | 15 |
| Figure 9: High share of red onions in Denmark | 16 |
| Figure 10: Organic is growing in main countries | 16 |
| Figure 11: Increase of purchases due to Corona | 17 |
| Figure 12: Very high consumption in Spain | 18 |
| Figure 13: Onion consumer prices high in France | 19 |
| Figure 14: Price peak 2019 in all countries | 19 |
| Figure 15: Area of spring sown onions still growing | 20 |
| Figure 16: NL: Gross production increased moderately | 21 |
| Figure 17: Average yield is decreasing | 21 |
| Figure 18: Production is moving to alternative regions | 22 |
| Figure 19: Increasing trend for Dutch onion exports | 23 |
| Figure 20: Africa most important export destination | 23 |
| Figure 21: Dutch Onion exports 2021 at a high level | 24 |
| Figure 22: Low price level in the Netherlands | 25 |
| Figure 23: NL: Increase in purchase 2020 | 25 |
| Figure 24: Onion surface at record level | 27 |
| Figure 25: Production of organic onions has increased | 28 |
| Figure 26: More onions in German stores | 29 |
| Figure 27: More onions in special stores | 30 |
| Figure 28: High share of German onions in May 2021 | 30 |
| Figure 29: Share of onions from New Zealand reduced | 31 |
| Figure 30: Prices of NZ onions at a seasonal level | 31 |
| Figure 31: Prices stagnating at a low level | 32 |
| Figure 32: Onion purchases keep at high level | 32 |
| Figure 33: Higher purchases at the beginning of 2021 | 33 |
| Figure 34: Spanish type onions lost importance | 34 |
| Figure 35: Strong rise stopped for now | 34 |

Index of Figures

| | |
|--|----|
| Figure 36: High share of organic in expenditures | 35 |
| Figure 37: Record purchases in 2020 | 38 |
| Figure 38: Onion production has increased | 39 |
| Figure 39: Size distribution changes a lot | 40 |
| Figure 40: Increase in area continues | 41 |
| Figure 41: Declining line in purchase stopped | 42 |
| Figure 42: Stagnating household consumption | 44 |
| Figure 43: Increase of crop area in northern Europe | 45 |
| Figure 44: High purchases after bumper crop | 48 |
| Figure 45: Exports high in second half of 2021 | 49 |
| Figure 46: Imports peak in March/April | 49 |
| Figure 47: Spanish Imports from outside EU rising | 50 |
| Figure 48: Poland: Prices stable for many weeks | 52 |
| Figure 49: Decrease of crop area and low yields | 53 |
| Figure 50: Foreign trade only important in a few years | 54 |
| Figure 51: Record onion production in Turkey | 55 |
| Figure 52: India loses its strong export position | 58 |
| Figure 53: India: no extreme price-increase 2021/22 | 60 |
| Figure 54: Onion production at high level | 60 |
| Figure 55: Japan: Production rises | 63 |
| Figure 56: China is most important supplier | 54 |
| Figure 57: Exports have declined in recent years | 56 |
| Figure 58: Production and area are on the rise 2020 | 66 |
| Figure 59: US onion exports 2019 at record level | 67 |
| Figure 60: US onion imports increased | 67 |
| Figure 61: Smaller production despite of larger area | 68 |
| Figure 62: Low retail prices 2021 in Canada | 69 |
| Figure 63: Peruvian onion production decreased again | 72 |
| Figure 64: High production in 2021 | 73 |
| Figure 65: Brazil: Low prices in Summer | 74 |
| Figure 66: Still high prices in the south of Brazil | 74 |
| Figure 67: Imports mainly from April to June | 75 |
| Figure 68: Chilean Onion area constant after increase | 78 |
| Figure 69: NZ: Lower exports to Europe | 80 |
| Figure 70: Surface declines for the second time in a row | 81 |
| Figure 71: Senegal: Imports mainly from the Netherlands | 84 |

| | |
|--|----|
| Figure 72: Ivory Coast: imports all through the year | 85 |
| Figure 73: Imports also from neighbouring countries | 86 |
| Figure 74: Egypt: Exports failed high level of 2019 | 86 |

Index of Tables

| | |
|---|----|
| Table 1: Onion Production in the European Union and UK | 11 |
| Table 2: Overview over the German Onion Sector | 26 |
| Table 3: German Onion Imports in 1,000 T | 36 |
| Table 4: German Onion Exports in 1,000 T | 37 |
| Table 5: Overview over the Austrian onion sector | 38 |
| Table 6: Household consumption of onions and shallots in Germany and France | 40 |
| Table 7: Overview over the British onion sector | 43 |
| Table 8: Overview over the Danish onion sector | 45 |
| Table 9: Overview over the Spanish onion sector | 47 |
| Table 10: Spanish Onion Exports | 48 |
| Table 11: Overview over the Polish onion sector | 51 |
| Table 12: Russian Onion Imports in | 54 |
| Table 13: Turkish Onion Export in T | 56 |
| Table 14: Indian onion exports in T | 58 |
| Table 15: Chinese Onion Exports in T | 62 |
| Table 16: Malaysian Onion Imports in T | 64 |
| Table 17: U.S. Onions: Planted area and production by state | 66 |
| Table 18: Mexican Onion Exports in T | 70 |
| Table 19: Peruvian Onion Exports in T | 71 |
| Table 20: Brazilian Onion Imports in T | 75 |
| Table 21: Argentinian Onion Exports in T | 77 |
| Table 22: Chilean Onion Exports in T | 79 |
| Table 23: Australian Onion Exports in T | 82 |
| Table 24: South African Onion Exports in T | 83 |