

AMI *MARKET* Report

Onions 2024



Facts for Decisions.



AMI MARKET REPORT ONIONS 2024

Trends in Production and Trade for Europe and the World

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Introduction

Two consecutive years with tight market supply and high prices are an exception for the world onion market. But this is exactly what happened in Europe in 2022/23 and 2023/24. Especially red onions are scarce in 2023/24, as planting decisions seem to be based on prices of the preceding season (hog cycle behaviour). While reductions of planted area in Europe exacerbated the shortage in 2022/23, the area expansions in 2023/24 could not compensate for the low yields. The shortage in both seasons was also partly caused by high sorting losses.

But the harvest in the Netherlands was not as scarce as assumed in the first crop estimate in autumn 2023. At the same time over 100,000 T fewer onions were exported from the Netherlands by the end of the year 2023. Accordingly, even with high sorting losses, there are likely to be larger quantities still stored in the Netherlands, which must be sold by June 2024. In autumn the market was supported by a short supply in various countries in Central- and South-Asia. Some countries even imposed export bans. In addition to India this holds true for Egypt and Turkey. And Brazil is likely to have a higher import requirement from March to May 2024. So, the last third of the of the 2023/24 onion season will probably remain exiting.