

Review

Onion season 2022/23, The Netherlands

EURONION

November, 3th 2022

Holland Onion Association (HOA)

Part of Fresh Produce Centre

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Board member of the Onion committee



Content presentation

- Retrospect previous season (2021/22)
- Acreage seed onions and sets
- Growing conditions, yield and export volume forecast
- Size seed onions
- Developments in export of Holland onions



Retrospect: 2021/22 expected and finally realized volumes



Export Holland onions 2021/22

- Export forecast (HOA November):
- Export realized:

1.310.000 tonnes

1.300.000 tonnes

(-0,8% compared with expected volume)



Acreage seed onions -9% in 2022: 27.446 ha (e)

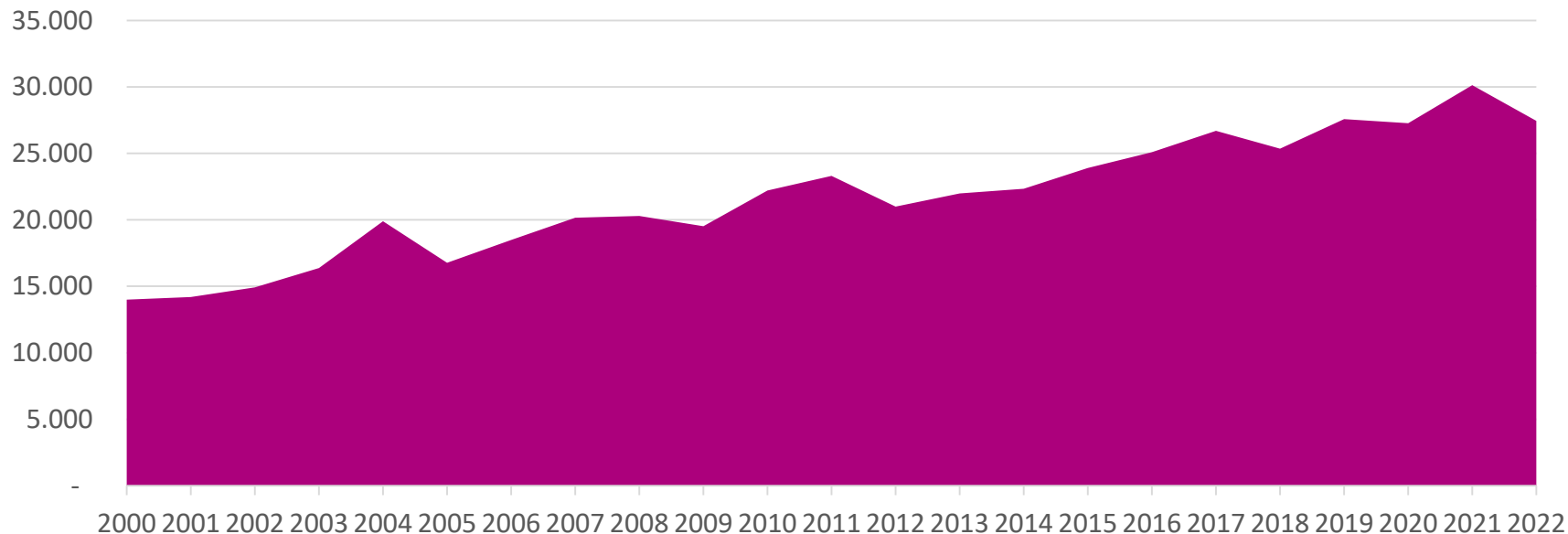


Source CBS

2021: 30.122 ha

2020: 27.269 ha

Development of seed onions in the Netherlands since 2000



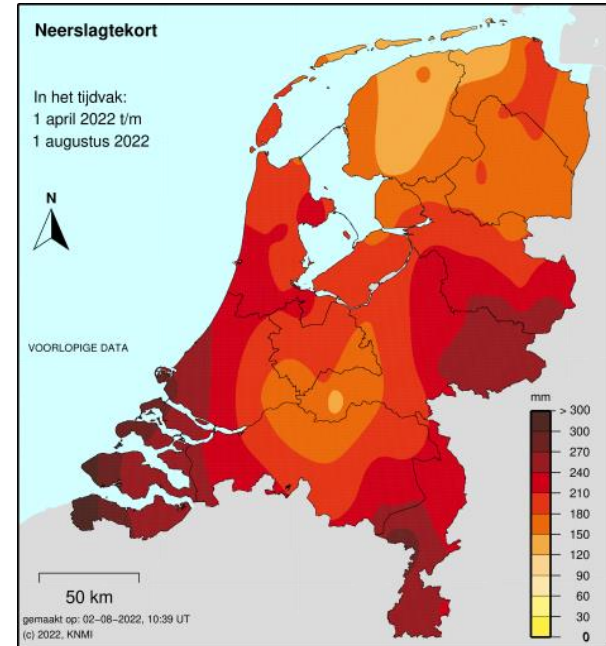
Growing conditions 2022



- Irregular germination start
- Slower development due to cold spring
- Problems drought in growing season
- Large differences in yields within and between regions



Precipitation shortage (April – August)



Yield and export forecast 2022/23

Source: CBS/Holland Onion Association



- Substantial differences in yield between regions: **20 – 85 ton** per hectare

Seed onions

- Initial estimate of production seed onions: **1.211.577 ton gross production** (=27.422 ha x 44,2 t/ha)
- Non harvested area: 250 ha (e) → ~11.000 ton

Set onions

- Production onions set: **282.666 ton gross production** (= 5.784 ha x 48,9 tonnes)
- Non harvested: 100 ha (e) → ~5.000 tonnes

TOTAL AVAILABLE FOR EXPORT:

1.006.000 ton, means an average of 19.400 t/wk export

Published by official reported data of KCB/HOA

(export this season until week 40: 385.000 tonnes)



Calculations in an overview 2022

Source: CBS/Holland Onion Association

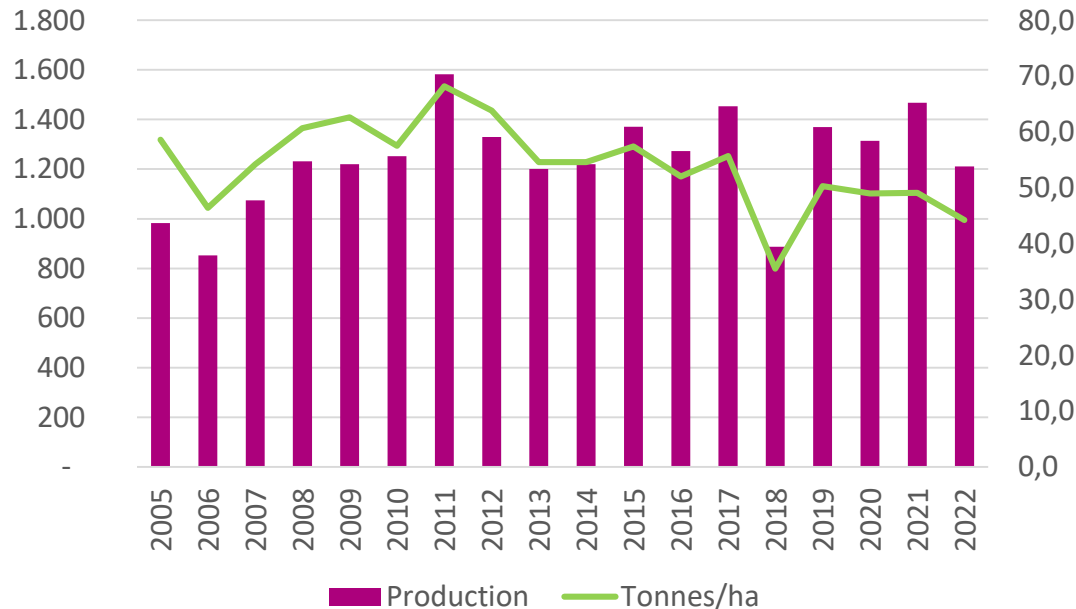


	2022
Gross production seed onions -/- non harvest area	1.200.000
Gross production onion sets -/- non harvest area	278.000
Total gross production onions	1.478.000
Total net production onions (= - 15%)	1.256.000
Dutch consumption + industry -/-	250.000
Available for export (net)	1.006.000

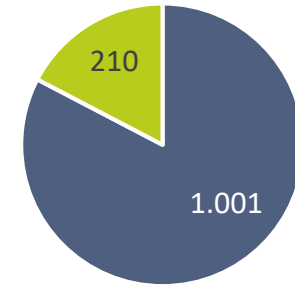
Yield trend seed onions (yellow + red)

2022/2023: initial estimate CBS 44,2 tonnes/ha; total gross production -17%

Production in million kilo and average yield in kilo per hectar



2022 split in yellow/red million tonnes

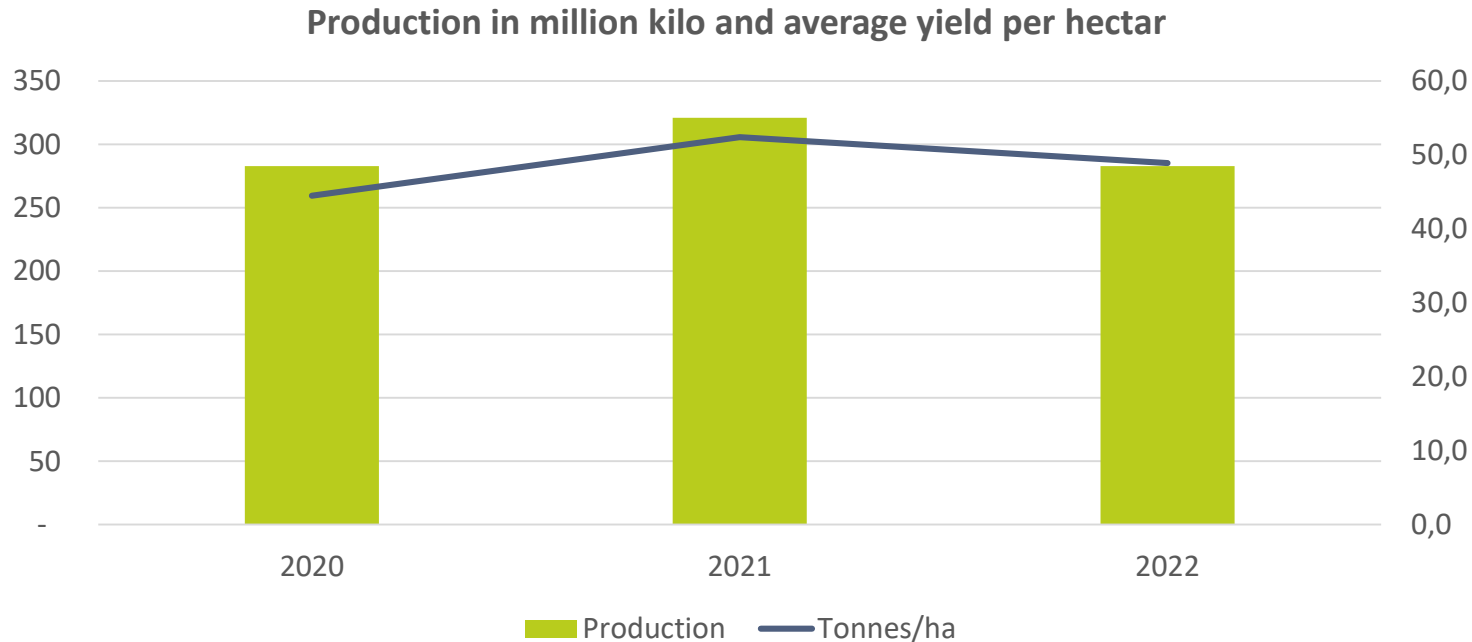


■ Yellow ■ Red



Yield trends set onions (since 2020)

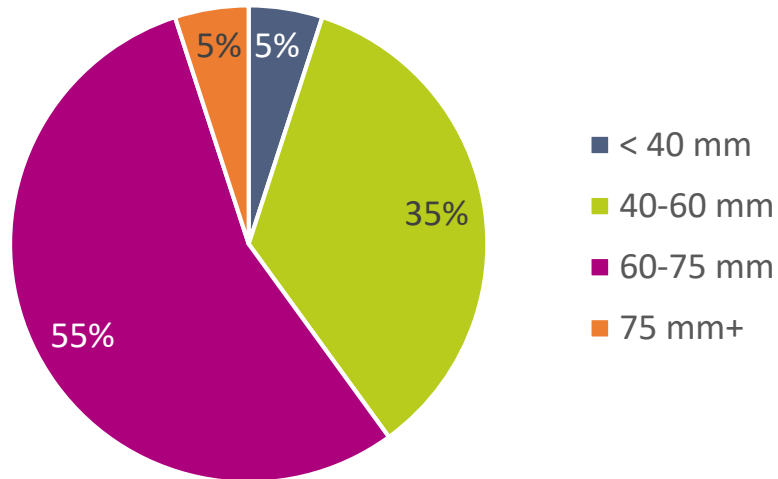
2022/2023: initial estimate CBS 48,9 tonnes/ha; total gross production -12%



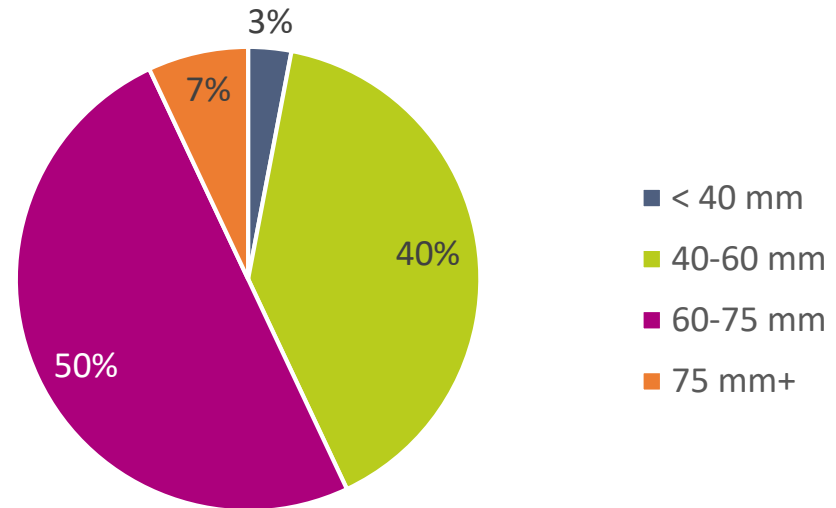
Size of Holland Onions in 2022/23 (e)

- Remark: NL uses different size classes

Estimate of sizes in 2021/22



Estimate of sizes 2022/23



Export Holland onions per season since 2005/06

Source : KCB/Fresh Produce Centre



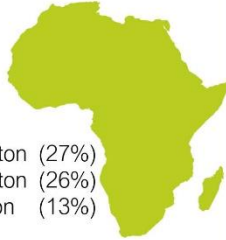
- Season 2021/22, again an export record: **1.300.000 ton**
- Worldwide and year round available to **130 countries on all continents**, whereas **38 countries >5.000 ton**
- Growth in export volume between 2005/06 – 2021/22 of about: **4% annually**



Export Holland Onions 2021/22

AFRICA

52%



Ivory Coast	180.012 ton	(27%)
Senegal	175.698 ton	(26%)
Guinea	86.179 ton	(13%)

EUROPE

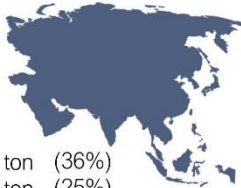
27%



UK	142.654 ton	(40%)
Belgium	34.693 ton	(10%)
Germany	25.940 ton	(7%)

ASIA

12%



Malaysia	56.530 ton	(36%)
Philippines	15.004 ton	(25%)
Indonesia	24.953 ton	(16%)

SOUTH AMERICA

5%



Nicaragua	17.317 ton	(28%)
Trinidad	9.454 ton	(15%)
Honduras	8.134 ton	(13%)



NORTH AMERICA

4%

Dom. Republic	15.625 ton	(30%)
Haiti	15.004 ton	(29%)
Jamaica	9.585 ton	(19%)

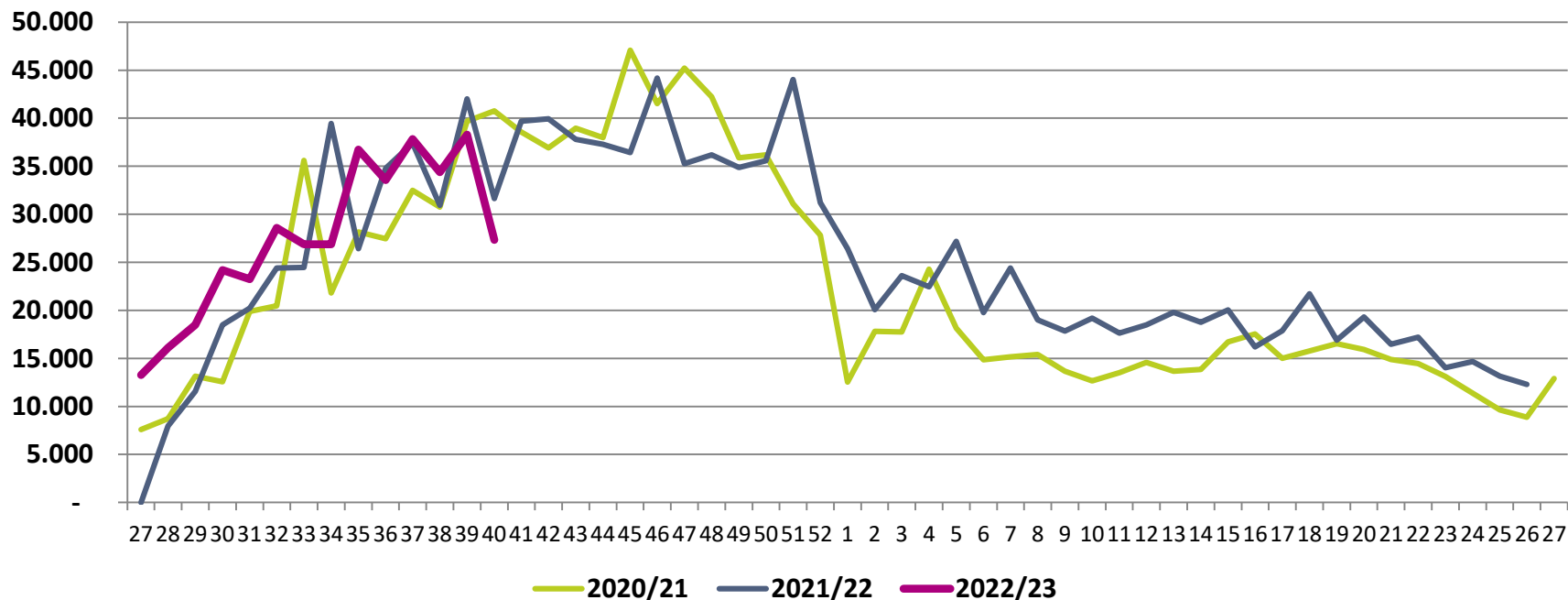
Source: KCB/Fresh Produce Centre

Weekly export Holland onions (until week 40 2022)

Source: KCB/Fresh Produce Centre



- September 2022 high export volumes; weekly average 36.000 tonnes

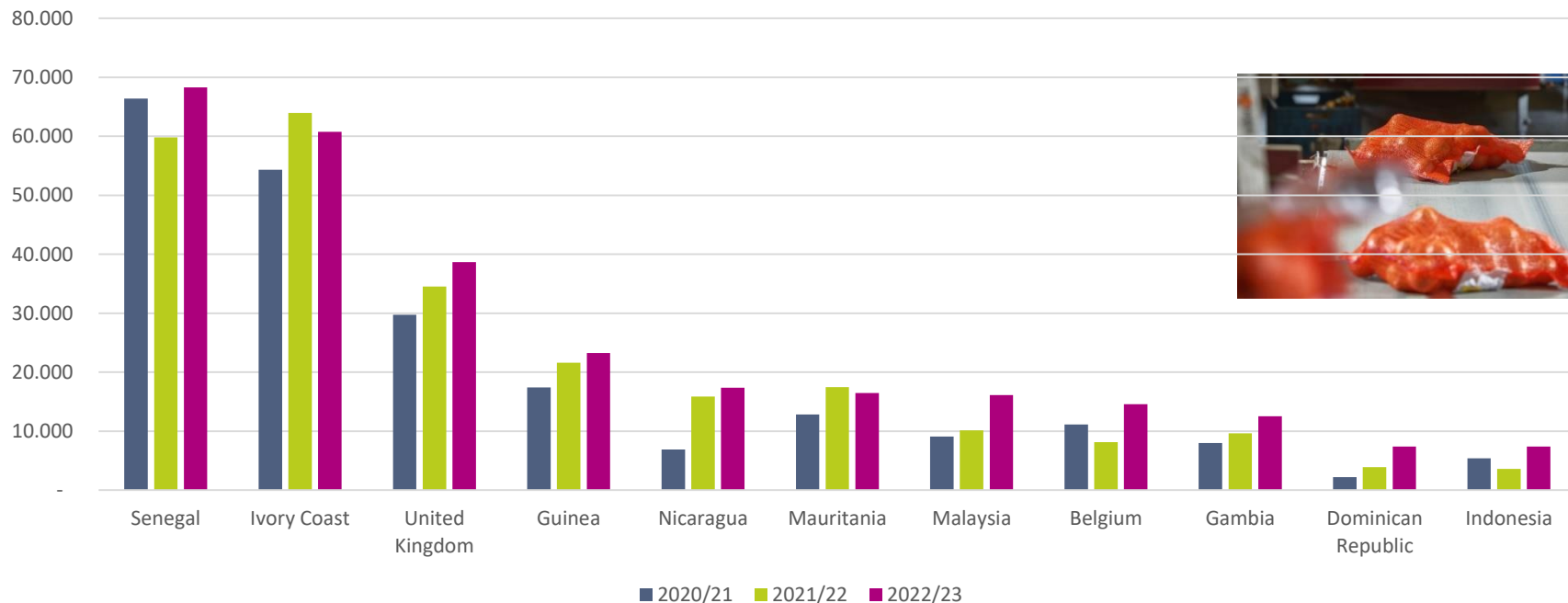


Export Holland onions week 27-40

source: KCB/Fresh Produce Centre



- New export record first 13 weeks 2021/22: 385.000 tonnes (+6% versus 2021/22)
- Strong demand Western Africa and “extra” demand South East Asia (Indonesia, Malaysia), Dominican Republic, United Kingdom



Thank you for your attention!



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www.holland-onions.org

