

NEDSPICE 
ready-to-eat dehydrated onions



esa EUROPEAN
S P I C E
ASSOCIATION

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ESA GENERAL ASSEMBLY
2022 - BODRUM - **TÜRKİYE**
5th - 8th **O C T O B E R**

Dehydrated onion report
Christiaan de Leeuw
Nedspice



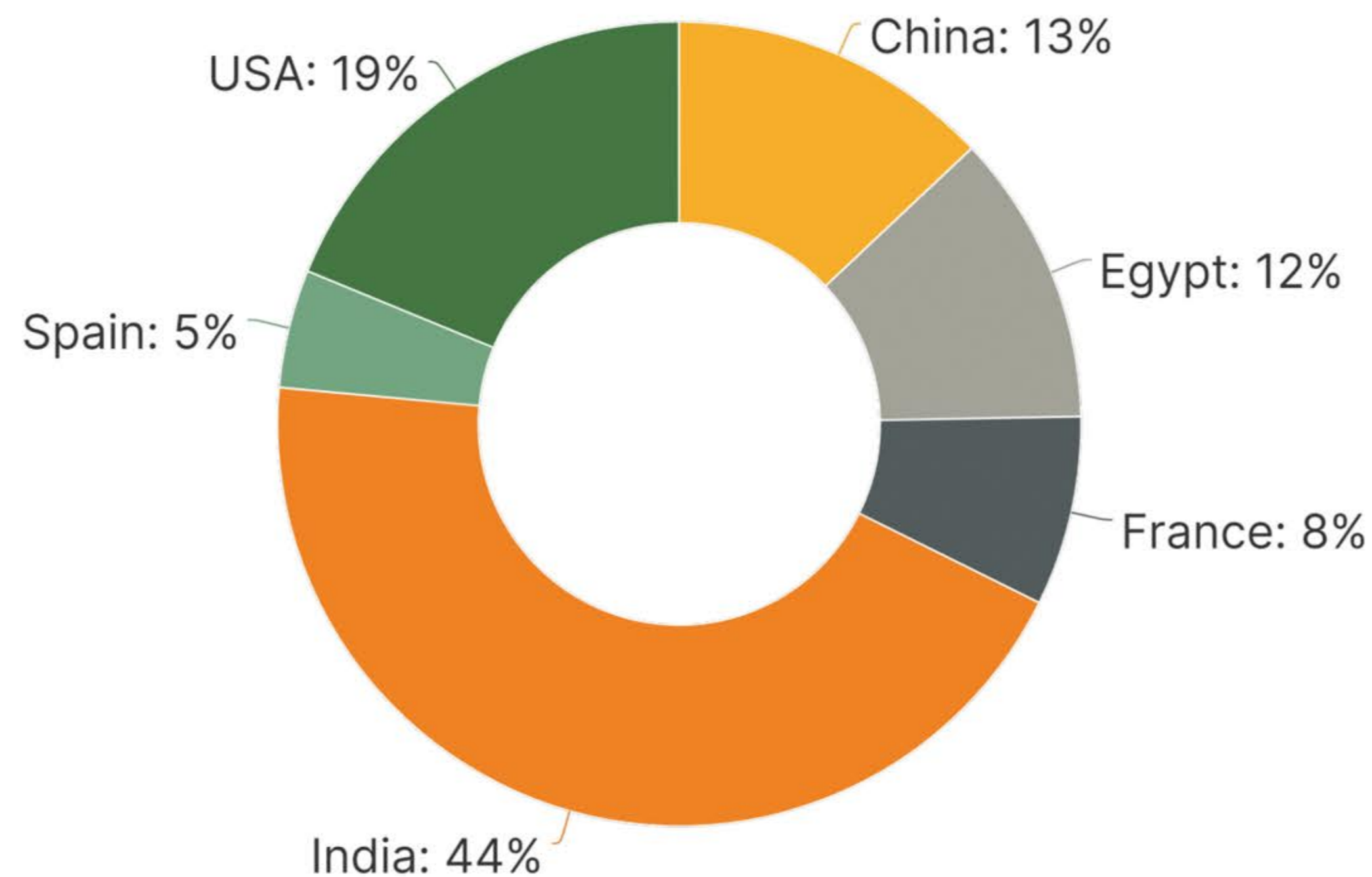
1. Global market overview
2. Producing countries breakdown
3. Towards a sustainable future





- Estimated 240KMT production globally
- Export market ~150KMT
- USA largest producer, India largest exporter
- Each origin with different material and production quality

Relative export volume main producing countries (2021)





*Let's peel back the onion
to see what's really happening*



CULTIVATION

- West coast: California and Oregon
- Contract farming, highly mechanized
- Long season, Apr-Oct, moving north over time
- Water shortages



CHARACTERISTICS

- Mostly white onions
- High solids
- Consistent quality
- Good traceability

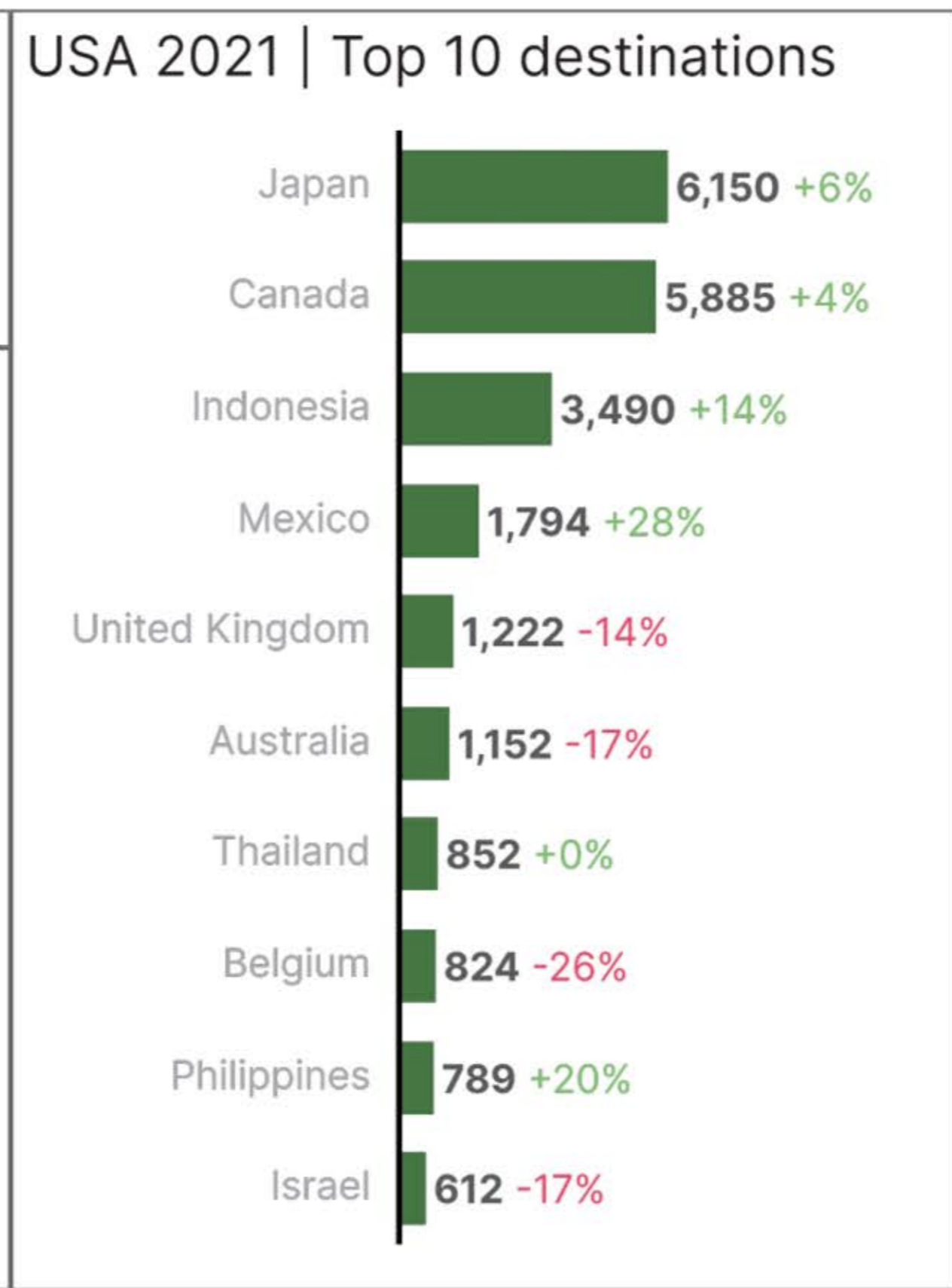
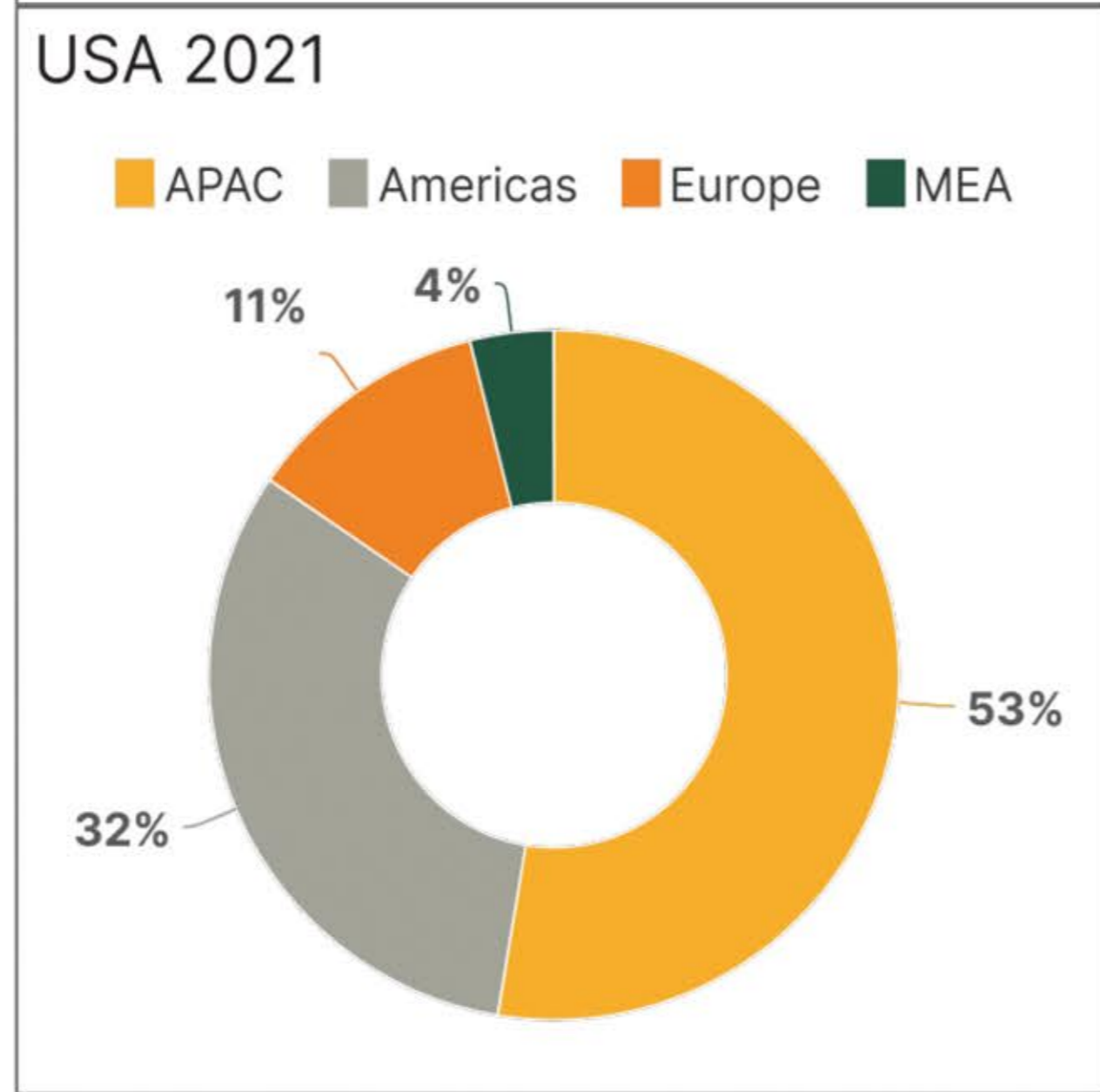


PRODUCTION & MARKET

- Largest global producer at ~110KMT annually
- Largest domestic market, protected by import tax
- Onions specifically grown for dehydration

- After difficult start to season, yield recovered
- Inflation pressure is driving up prices
- Logistics normalizing
- High quality grades in short supply

USA 2021 (MT)
27.7 k (+2.7%)
 Quantity (Δ 2020)





CULTIVATION

- Gujarat, Maharashtra
- Multiple cultivation techniques
- Khariff: Nov | Rabbi Mar-Jun
- Mostly smallholder farmers, manually harvested



CHARACTERISTICS

- Red, white and pink onions
- Relatively low solids
- Large variety in quality
- Challenges with traceability



PRODUCTION & MARKET

- Second biggest producer, largest exporter
- Important link with fresh market
- Many small dehydration plants, including many new factories

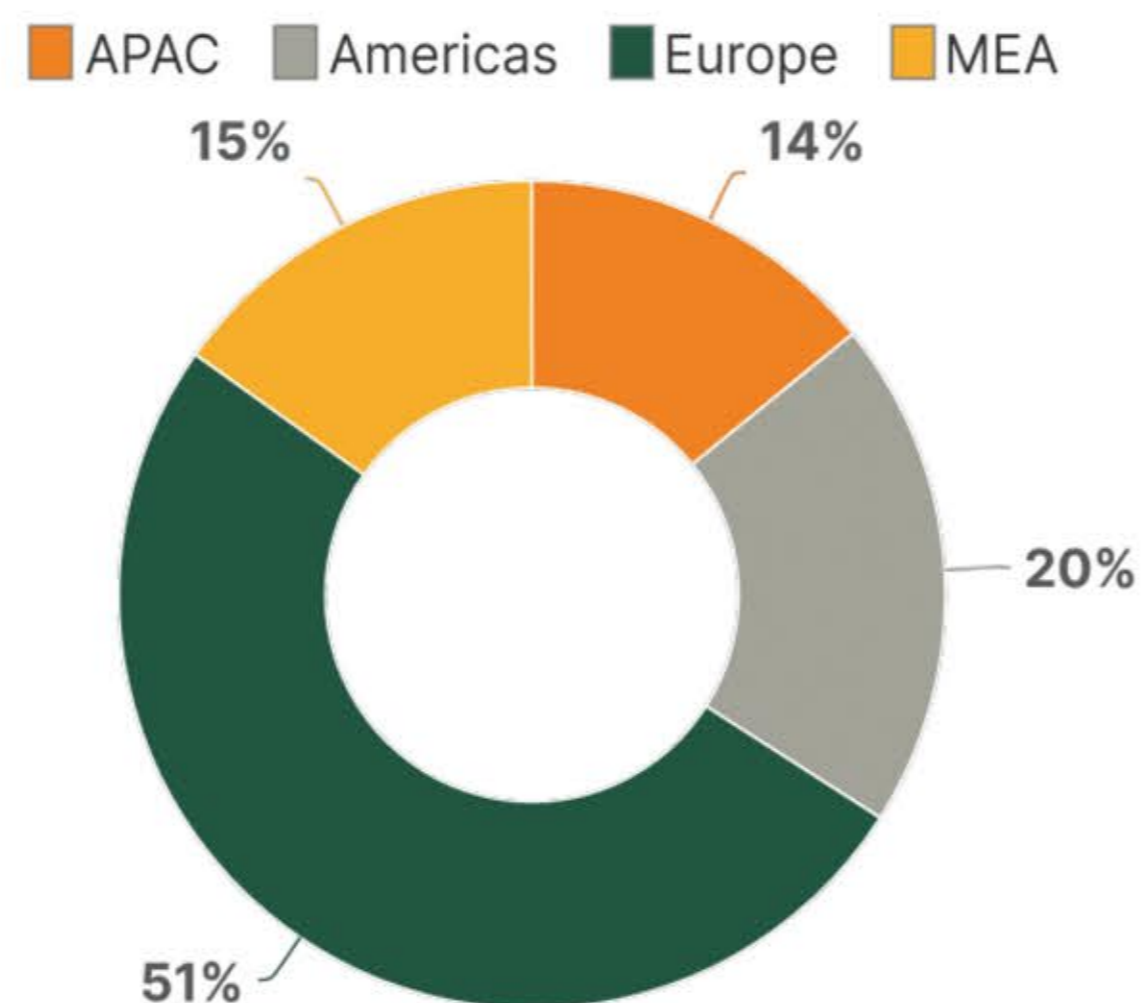
- Shipping costs on downward trend
- Direct sowing applied to save on labor costs
- 2022 was good crop, yields lower but total quantity similar to 2021
- Processing costs up, going into 2023 as well

Exports India 2021

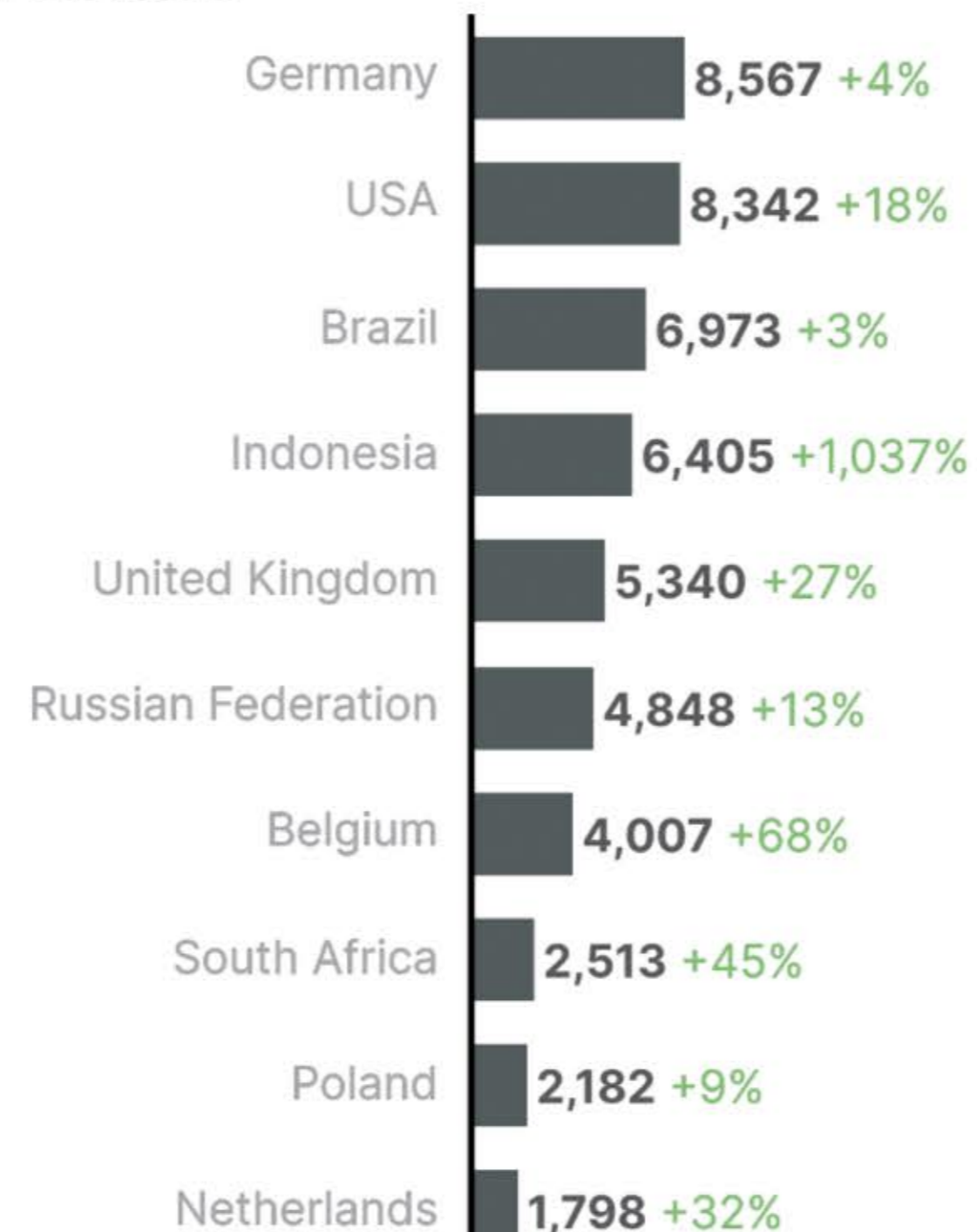
65,031 k (+14%)

Netweight (kg) (Δ 2020)

India 2021



India 2021 | Top 10 destinations in Thousand





CULTIVATION

- Majority in Gansu (NW-China)
- Harvest Sept-Nov
- Mix contract- and traditional farming with basic machinery
- Limited traceability



CHARACTERISTICS

- Low sugar content
- Non-white color
- High solid content



PRODUCTION & MARKET

- Third biggest producer and exporter
- Prices stable through majority of the year
- Mostly for US and Asian market

- Planting decreased 40% vs 2021, back on '18-'20 level
- Limited carry-over stocks available on account of high demand
- Average yields expected

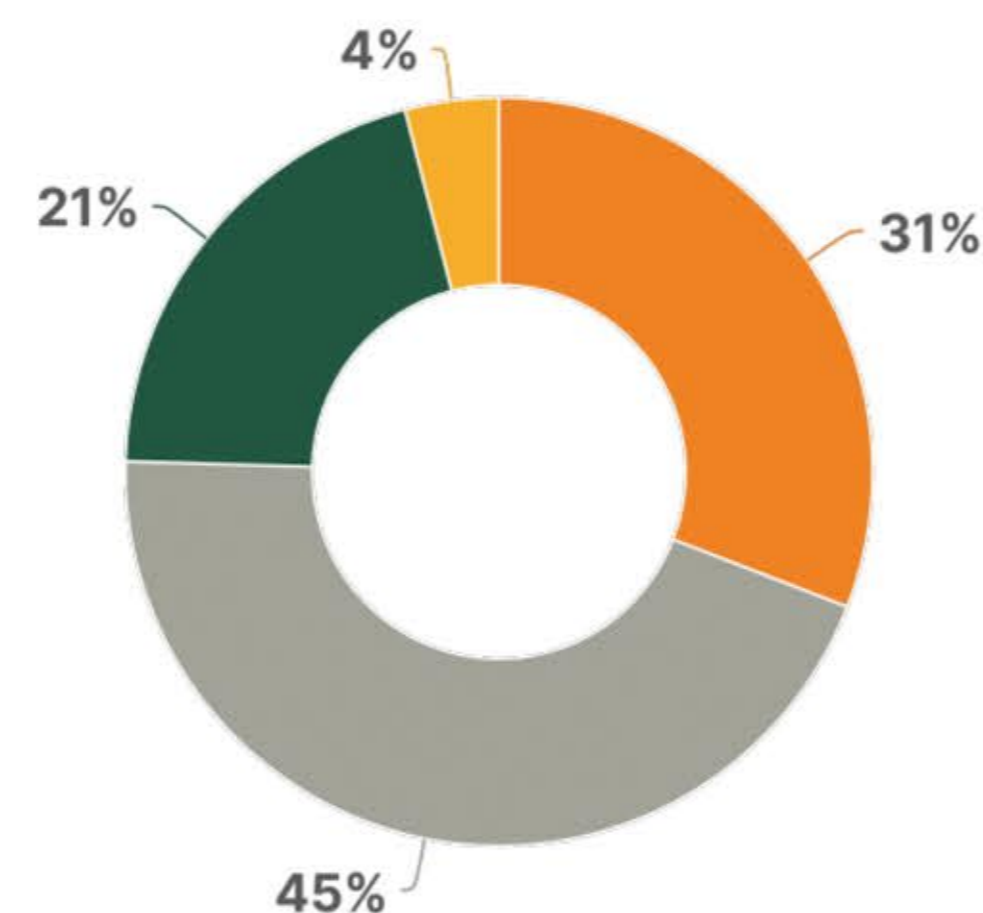
Exports China 2021 (MT)

19,151 k (+1%)

Netweight (kg) (Δ 2020)

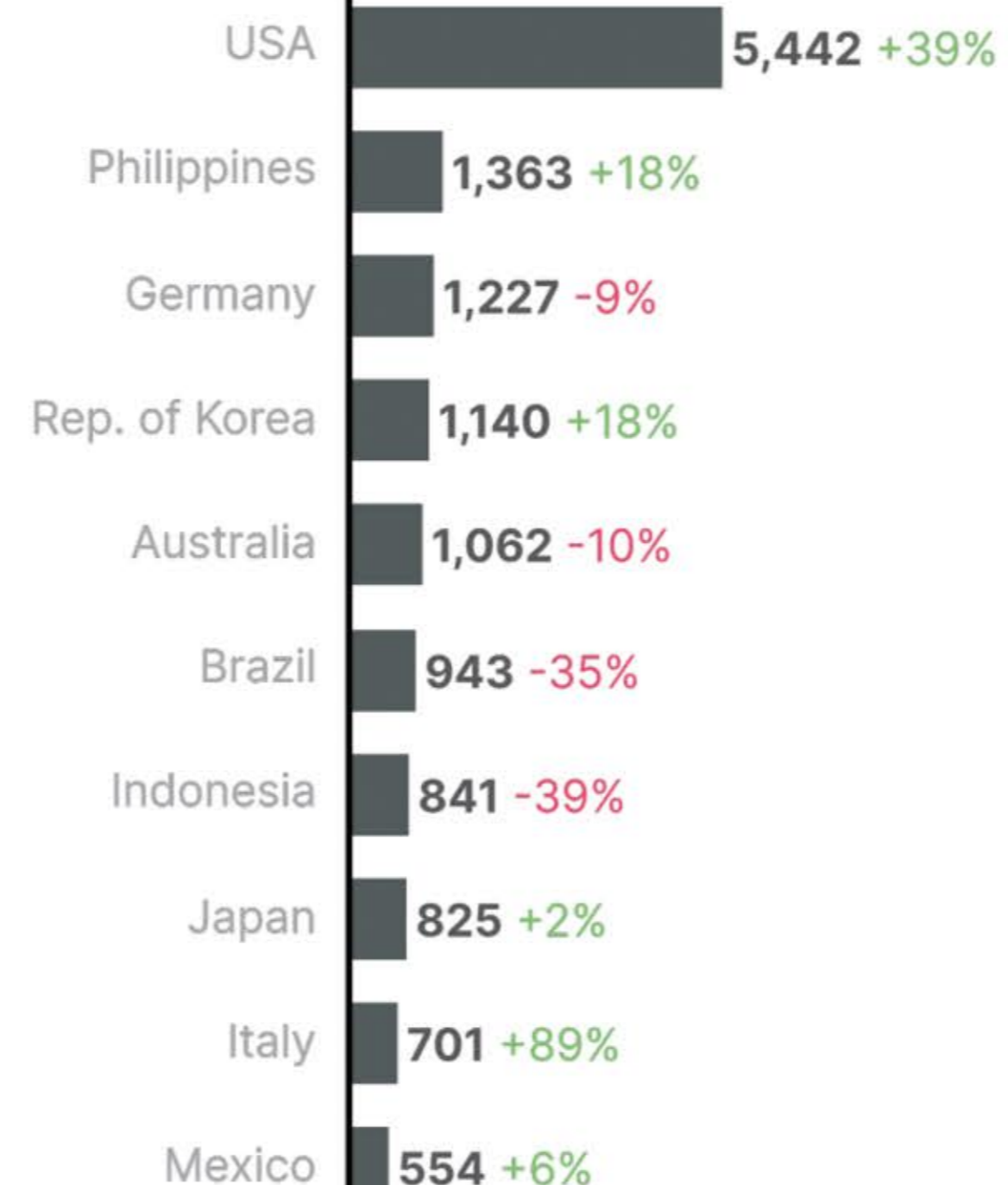
China 2021

APAC Americas Europe MEA



China 2021 | Top 10 destinations

in Thousand





CULTIVATION

- Smallholder farmers, partly contract farmers
- Two crop seasons (Apr-Jun and Dec-Feb)



CHARACTERISTICS

- Solid content varies
- Yellow and white
- Good microbial quality, especially winter harvest



PRODUCTION & MARKET

- Fourth biggest producer and exporter
- Mainly exporting to Europe (tax-exempt)
- Also large fresh onion exporter to Europe



PRICE OUTLOOK

- Prices up significantly vs last year
- Government incentive to grow wheat instead



CULTIVATION

- Mainly France and Spain
- Highly mechanized cultivation
- Dehydration activities Jul-Dec



CHARACTERISTICS

- Stable quality
- Good traceability
- Medium solids



PRODUCTION & MARKET

- Majority for internal EU market
- High end of the market



PRICE OUTLOOK

- Upward price trend like other origins
- Increased processing costs (energy), amid record inflation

- ♻️ Reduction of fossil fuel use
- ♻️ Sustainable water management
- ♻️ Living income for farmers



Thank you for your attention!

