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Market Insights

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SUMMARY

USA: Healthy crop conditions and active farmer selling kept the market steady despite lower overall farmer stock prices.

China: Stable prices, tightening old-crop supplies, cautious buying, and higher imports kept the market balanced ahead of new-crop arrivals.

India: Strong domestic demand supported prices, while weak exports and high freight costs kept the market range bound.

Mali: Tight old-crop supplies kept prices firm, while improved rainfall and completed planting supported a positive new-crop outlook.

Brazil: Strong exports continued, but lower planting intentions and recent storm damage may tighten supplies in the next season.

CHINA

- **Prices:** Peanut prices remained largely stable. Imported Sudanese peanuts held at **¥8,100/MT**, while domestic edible peanut prices increased marginally. Peanut oil (**¥13,700/MT**) and peanut meal (**¥2,950/MT**) prices remained unchanged.
- **Supply:** Old-crop peanut supplies continued to tighten in Henan, Shandong, and Northeast China. Peanut inventories at oil mills declined **7.7% WoW** to **249,530 MT**.
- **Demand:** Oil mills maintained cautious procurement with lower weekly arrivals, while food processors continued hand-to-mouth buying ahead of the new crop.
- **Imports:** China's cumulative peanut imports reached **196,300 MT** during January–June 2026, reflecting significantly higher import volumes than last year.
- **Processing:** Peanut crushing margins improved to **¥10.81/MT**, supported by stable peanut meal prices, although oil mill operating rates eased slightly.
- **Weather:** Rainfall may delay new-crop arrivals in some regions, but overall market sentiment remains stable. Prices are expected to remain range-bound until larger volumes of the new crop enter the market.

Prices

Week-on-Week (2026)				Year-on-Year			
Month	29th July	05th Aug	% Change	Month	05th Aug 25	05th Aug 26	% Change
Oct	8,256	8200	-0.68%	Oct	8,074	8200	1.56%
Nov	8,256	8190	-0.80%	Nov	7,954	8190	2.97%
Dec	8,268	8200	-0.82%	Dec	7,952	8200	3.12%
Jan	8,298	8212	-1.04%	Jan	7,952	8212	3.27%

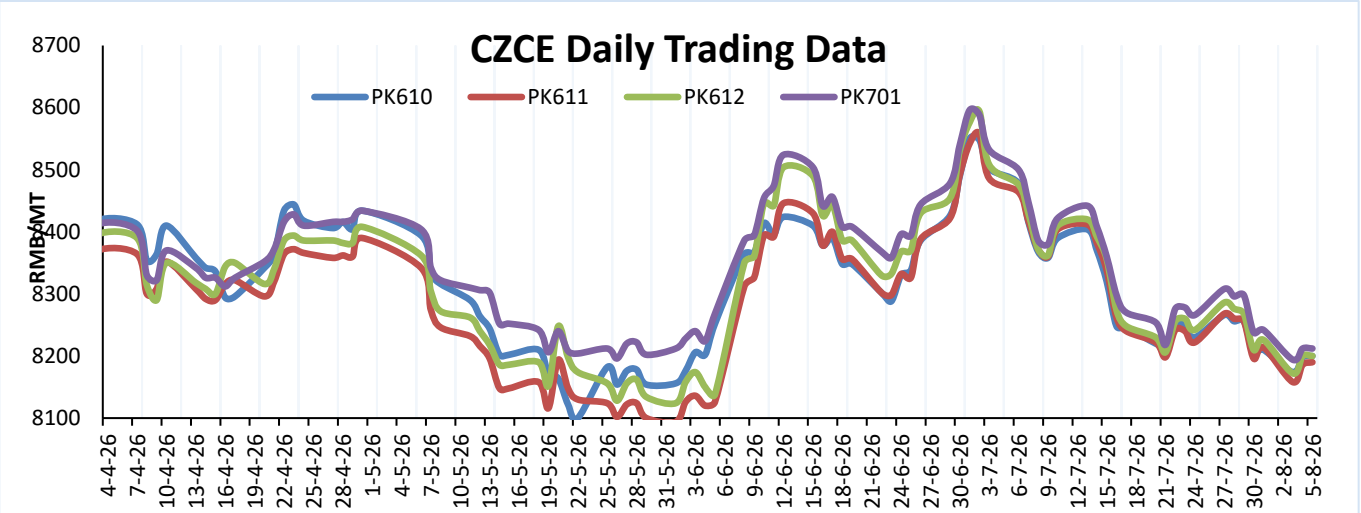
Zhengzhou Commodity Exchange Data

CZCE Daily Trading Data (05-08-2026)											
Contract Month	Prev. Settle	Open	High	Low	Close	Settlement	Change	Volume	Open Interest	OI Change	Turnover
PK610	8,198	8,192	8,212	8,184	8,198	8,200	2	13,730	85,873	-1,689	56,284
PK611	8,186	8,180	8,206	8,170	8,194	8,190	4	77,557	2,02,647	10,410	3,17,614
PK612	8,200	8,180	8,212	8,178	8,198	8,200	0	26,209	54,123	4,621	1,07,438
PK701	8,212	8,204	8,226	8,194	8,214	8,212	0	638	3,810	21	2,619
Total								**1,18,134**	**3,46,453**	**3,341**	**4,84,123**

Note:

In Contract PK610, PK denotes Peanut Kernel, 6 denotes year 2026, and 10 denotes month i.e., Oct., Price Unit: Yuan/Metric Ton, Lot size: 5 Metric Ton/lot, Volume, Open Interest: Lot Single-Counted), Turnover: Million Yuan (Single-Counted), Change:Settlement minus Prev.Settle

Peanut Kernel Forward Curve as Observed on Various Dates of Settlement



(Source: Zhengzhou Commodity Exchange)

MALI

- Market Activity: Peanut trading remained quiet as old-crop stocks were nearly exhausted across major producing regions, resulting in limited market transactions.
- Prices: Tight supplies continued to support prices. Shelled peanuts traded at 675–750 FCFA/kg at the producer level and 750–800 FCFA/kg wholesale, while inshell peanuts sold at 550–600 FCFA/kg.
- Supply: Stocks of both shelled and inshell peanuts have been largely depleted, with remaining volumes mainly reserved for seed purposes.
- Fresh Arrivals: The first shipments of fresh peanuts from Côte d'Ivoire have started arriving in southern Mali markets, providing limited new supplies.
- Crop Progress: Seasonal rainfall has improved across most producing regions, enabling completion of planting activities. Farmers are currently engaged in weeding and crop maintenance, with crop development progressing under generally favorable conditions.
- Limited old-crop availability is expected to keep prices firm until new-crop supplies become available, while favorable rainfall supports a positive production outlook for the upcoming harvest.

BRAZIL

Production: Brazil's peanut planted area is expected to decline by around 30% in the 2026/27 season due to weak grower margins, limited rural credit, and weather concerns. A severe storm on 24 July damaged 79,000 hectares in the Ribeirão Preto region, affecting peanut stocks, storage, and processing facilities.

Kernel Exports: Brazil exported 39,657 MT of peanut kernels in June, up 97% YoY and 29% MoM, making it the second-highest monthly export volume on record. Cumulative January–June exports reached 154,592 MT, a 32% increase over the same period last year.

Key Export Destinations: Algeria remained the largest buyer with 11,233 MT (+12% MoM), followed by Russia (9,398 MT, +35% MoM) and the EU-27 (5,229 MT, +25% MoM). Algeria and Russia together accounted for 52% of June kernel exports.

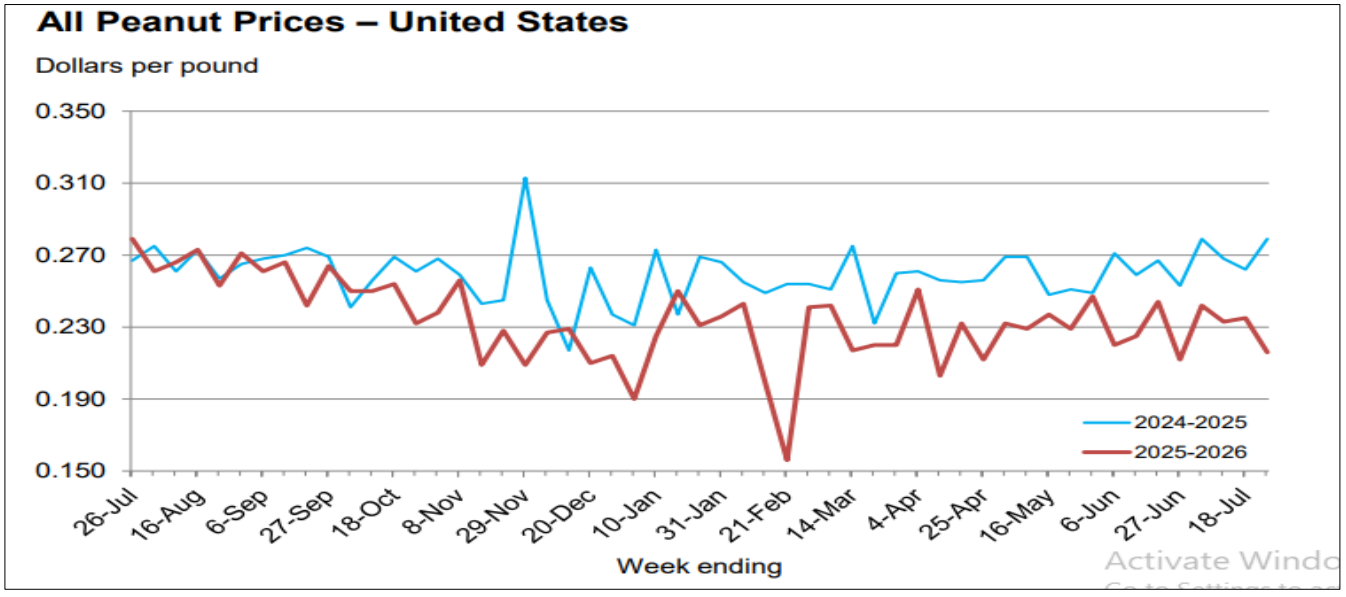
Peanut Oil Exports: June peanut oil exports totaled 13,198 MT, down 22% MoM but nearly unchanged from June 2025. China imported 11,393 MT, accounting for 86% of Brazil's peanut oil exports, while Italy imported 1,690 MT.

Export demand remains robust, particularly from Algeria, Russia, and the EU. However, competitive export prices continue to limit improvements in farm-gate prices. With lower expected planting and recent storm damage, Brazil's next crop could be smaller, potentially tightening export supplies in the 2026/27 marketing year.

USA

- **Crop Condition:** 77% of the U.S. peanut crop is rated **Good to Excellent** (64% Good, 13% Excellent), compared with **74%** during the same period last year.
- **Crop Share:** Only **7%** of the crop is rated **Poor to Very Poor**, indicating overall healthy crop conditions.
- **Peanut Pegging: 90%** of the crop has reached the **pegging stage**, up from **84%** last week and in line with the **five-year average (90%)**.
- **State Progress:** North Carolina (98%), South Carolina (97%), Florida & Virginia (95%), and Georgia (94%) are leading crop development.
- **Farmer Stock Prices:** Average prices for **all farmer stock peanuts** declined to **21.6 cents/lb** for the week ending **July 25**, down **1.9 cents** from the previous week (23.5 cents/lb).
- **Runner Peanut Prices: Runner-type peanut prices** increased slightly to **21.3 cents/lb**, up **0.5 cent** from the previous week.
- **Overall Marketings:** Total **farmer stock marketings** increased to **98.9 million pounds**, up **16.9 million pounds** week-on-week.
- **Runner Marketings: Runner-type marketings** rose sharply to **95.3 million pounds**, compared with **44.9 million pounds** in the previous week.

All Peanut Prices – United States (Source: USDA)



Peanut Pegging

Peanuts Pegging – Selected States

[These 8 States planted 95% of the 2025 peanut acreage]

State	Week ending August 2, 2025	Week ending July 26, 2026	Week ending August 2, 2026	2021-2025 Average
	(percent)	(percent)	(percent)	(percent)
Alabama	87	84	89	88
Florida	99	87	95	96
Georgia	96	90	94	95
North Carolina	96	97	98	93
Oklahoma	62	58	67	61
South Carolina	92	90	97	93
Texas	70	48	68	64
Virginia	84	91	95	88
8 States	91	84	90	90

Peanut Condition

Peanut Condition – Selected States: Week Ending August 2, 2026

[These 8 States planted 95% of the 2025 peanut acreage]

State	Very poor	Poor	Fair	Good	Excellent
	(percent)	(percent)	(percent)	(percent)	(percent)
Alabama	-	7	16	64	13
Florida	-	1	19	79	1
Georgia	1	8	33	51	7
North Carolina	1	1	15	44	39
Oklahoma	3	12	26	56	3
South Carolina	2	9	27	57	5
Texas	1	4	44	48	3
Virginia	-	-	38	62	-
8 States	1	6	29	55	9
Previous week	1	5	30	56	8
Previous year	-	3	24	62	11

- Represents zero.

Peanut Prices and Marketings by Type (Quantity Purchased) – United States (Source- USDA)

Peanut Prices and Marketings by Type – United States: June 27, 2026-July 25, 2026

Item and type	Week ending June 27, 2026	Week ending July 4, 2026	Week ending July 11, 2026	Week ending July 18, 2026	Week ending July 25, 2026
	(dollars per pound)	(dollars per pound)	(dollars per pound)	(dollars per pound)	(dollars per pound)
Average price					
Runner	0.212	0.229	0.223	0.208	0.213
Spanish	(X)	0.512	(X)	(X)	0.279
Valencia	(X)	(X)	(X)	(X)	(X)
Virginia	(X)	0.259	0.285	0.267	0.293
All	0.212	0.242	0.233	0.235	0.216
	(1,000 pounds)	(1,000 pounds)	(1,000 pounds)	(1,000 pounds)	(1,000 pounds)
Marketings [1]					
Runner	82,514	83,505	81,097	44,913	95,258
Spanish	-	1,935	-	-	1,649
Valencia	-	-	-	-	-
Virginia	-	31,656	16,421	37,135	2,006
All	82,514	117,096	97,518	82,048	98,913

- Represents zero.
(X) Not applicable.
[1] Quantity purchased from farmers.

Source: USDA

INDIA

- **Exports:** Peanut export activity remained subdued due to **high freight costs** and weak buying interest from key markets. Brazil continues to offer more competitive prices, while **China has remained absent from the Indian bold peanut market**. Exporters are facing losses as container freight has increased to around **US$6,000/container** from earlier levels of **US$2,500–3,000**.

- **Domestic Demand:** Strong demand from **South India and Maharashtra**, coupled with upcoming festive consumption (Janmashtami to Diwali), continues to support domestic peanut prices.
- **Sowing Progress:** India's groundnut sowing reached **43.08 lakh hectares**, up from **41.90 lakh hectares** last year. In Gujarat, sowing stood at **19.78 lakh hectares** (vs. **20.42 lakh hectares** last year), while Rajasthan reported higher acreage and Madhya Pradesh completed sowing.
- **Crop Outlook:** Overall sowing remains broadly in line with expectations. However, **late-season (Pakchhotar) rainfall** will be critical in determining yield and final production, particularly in Gujarat and Madhya Pradesh.
- **Stocks:** Government agencies, mainly **NAFED**, hold an estimated **5.25–6.0 lakh MT** of peanuts, while private stocks are limited. Overall available stocks are estimated at **6.5–8.0 lakh MT**, with **minimal carryover expected** into the new season.
- **Indonesia:** Reopening of exports to Indonesia has improved sentiment and lifted **TJ (1J) peanut prices by ₹2–3/kg**. However, uncertainty over Indonesia's quota allocation is expected to limit the overall impact on export demand.

STATISTICS

Year wise Exports of India (Quantity) (MT)

Country	2021	2022	2023	2024	2025
Indonesia	251072	225765	205541	275598	216498
Viet Nam	82942	104465	156060	107225	96194
Malaysia	42377	49509	50779	50453	73364
Philippines	50821	49304	50240	60932	48331
Thailand	21423	30546	38236	44108	33618
U A E	20223	16754	26819	29752	42222
China	12738	9756	2286	3570	62399
Bangladesh	9015	16300	15246	17804	20284
Russian	6429	5153	12153	21494	14519
Iran	8058	7642	12359	9845	10468
Others	44762	45717	84031	108315	100817
Total	5,49,859	5,60,912	6,53,750	7,29,098	7,18,712

Year on Year Comparison of Exports - India

	2024		2025	
Importers	Qty(MT)	USD/MT	Qty(MT)	USD/MT
Indonesia	275598	1099	216498	974
Viet Nam	107225	1198	96194	1065
Malaysia	50453	1134	73364	1000
Philippines	60932	1181	48331	1034
Thailand	44108	1250	33618	1166
U A E	29752	1187	42222	985
China	3570	1127	62399	865
Bangladesh	17804	750	20284	749
Russian	21494	1267	14519	1085
Iran	9845	1180	10468	939
Others	107769		100817	
Total	728551		718712	

Jan to May 2025 vs 2026 of Exports - India

2025						2026					
Importers	**Jan**	**Feb**	**Mar**	**April**	**May**	**Importers**	**Jan**	**Feb**	**Mar**	**April**	**May**
Indonesia	29149	24615	25809	19192	25140	**Indonesia**	14294	3536	8195	17806	13037
Viet Nam	4563	2650	7161	10364	7141	**Malaysia**	12241	2934	3910	9499	3885
Thailand	1777	3954	4126	7671	6103	**Viet Nam**	5367	3461	4138	7489	4363
China	1640	2302	5905	5364	5915	**Thailand**	3803	2371	1639	10730	3195
Malaysia	4075	3787	3602	3536	5171	**Bangladesh**	4821	1485	2500	3107	2214
Philippines	5264	3727	2919	2609	3184	**Philippines**	1968	1586	1451	3942	3054
U A E	6017	2270	1221	614	1335	**U A E**	3928	1738	261	428	565
Russian	3032	3144	2076	1843	977	**Russian**	1308	1769	435	475	1213
Bangladesh	2465	2557	1475	1750	1075	**Yemen**	630	972	1150	700	1400
U K	1668	1644	734	853	343	**Sri Lanka**	144	513	1031	1082	1445
Others	11304	13520	9855	7447	6162	**Others**	8362	6090	2649	6960	6364
Total	70954	64170	64882	61243	62546	**Total**	56865	26453	27359	62217	40734

May 2025 vs May 2026

Importer	May-25	May-26	% Change
Indonesia	25,140	13,037	-48.10%
Viet Nam	7,141	4,363	-38.90%
Thailand	6,103	3,195	-47.70%
Malaysia	5,171	3,885	-24.90%
China	5,915	644	-89.10%
Philippines	3,184	3,054	-4.10%
Bangladesh	1,075	2,214	106.00%
U A E	1,335	565	-57.70%
Russian	977	1,213	24.20%
U K	343	0	-100%
Sri Lanka	0	1,445	-
Yemen	0	1,400	-
Others	6,162	6,364	3.30%
Total	62,546	40,734	-34.90%

Indian Key Market Statistics

Groundnut — weekly rate table (29-Jul vs 05-Aug 2026)

Market	Origin	Variety	Count	29-Jul Min	29-Jul Max	05-Aug Min	05-Aug Max	WoW Change	WoW % Change
Hyderabad	Telangana	Java	60/65	13,200	13,300	12,800	13,200	-250	-1.89%
Hyderabad	Gujarat	Bold	50/60	10,750	10,850	10,250	10,250	-550	-5.09%
Hyderabad	Rajasthan	Bold	40/50	10,700	10,850	10,450	10,450	-325	-3.03%
Hyderabad	Gujarat	Java	80/90	13,100	13,300	12,450	12,450	-750	-5.67%
Hyderabad	MP/UP	TJ	50/60	11,500	11,500	11,800	11,800	300	2.61%
Hyderabad	Banaskantha	TJ	50/60	12,600	12,600	12,600	12,600	0	0.00%
Chennai/Mumbai	Telangana	Java	60/65	13,200	13,300	12,800	13,200	-250	-1.89%
Chennai/AP	AP	Java	80/90	12,700	12,800	12,500	12,500	-250	-1.97%
Keshod	Gujarat	Java	50/60	11,500	11,500	11,800	11,800	300	2.61%
Keshod	Gujarat	Java	80/90	11,000	11,000	11,300	11,300	300	2.73%
Keshod	Gujarat	Bold	40/50	10,600	10,600	10,700	10,700	100	0.94%
Keshod	Gujarat	Bold	38/42	11,400	11,400	11,300	11,300	-100	-0.88%

FOREX (Against USD)

Currency	July 29, 2026	Aug 05, 2026	WoW %	Year to Date % Change
Argentine Peso (ARS)	1499.76	1496.5	-0.22%	3.10%
Brazilian Real (BRL)	5.1212	5.1284	0.14%	-6.38%
Chinese Yuan (CNY)	6.7663	6.75	-0.24%	-3.48%
Indian Rupee (INR)	95.742	95.16	-0.61%	5.77%
Mozambican Metical (MZN)	63.89	63.89	0.00%	0.42%
Nigerian Naira (NGN)	1365.24	1362.98	-0.17%	-5.77%
Sudanese Pound (SDG)	600	600.2207	0.04%	0.02%
Tanzanian Shilling (TZS)	2635.01	2647.5	0.47%	7.62%
Euro (EUR)	0.8785	0.8667	-1.34%	1.80%
West African CFA (XOF)	576.02	568.839	-1.25%	1.76%
Turkish Lira (TRY)	47.3976	47.5774	0.38%	10.56%

Note: *A positive (+) change indicates a depreciation of the mentioned currency, A negative (-) change indicates an appreciation of the mentioned currency, Year-to-Date % Change reflects the currency's value fluctuation from January 1, 2025 till date.*

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