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Market Insights

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SUMMARY

USA: US peanut harvesting reached 22%, with 57% rated good to excellent, while prices and farmer marketings increased.

India: Gujarat's peanut arrivals are increasing, but high moisture limits crushing, while a smaller estimated crop and weak oil demand keep the market cautious.

Argentina: Argentina's peanut acreage outlook is mixed, with credit constraints and crop quality concerns persisting.

China: China's new-crop peanut arrivals remain limited, with moderate buying interest and larger Northeast supplies expected after 10 October.

Brazil: Brazil's peanut planting is underway, but credit constraints may reduce acreage by 25–30%, despite strong kernel exports.

Africa: African peanut supply remains limited, with Nigeria offering new crop and Senegal beginning harvesting and preparing its marketing campaign.

Argentina

- Argentina's 2026/27 peanut planting intention is estimated by Argentina's Secretariat of Agriculture, Livestock and Fisheries (SAGyP) at approximately 430,000 hectares, up 2.4% year-on-year, while Córdoba Grain Exchange separately projects an 8% decline in provincial area pointing to tighter South American supply in 2027.
- Planting is expected to expand in Río Cuarto but decline in northwestern Buenos Aires and southern Santa Fe, where flood-prone soils could hinder digging and harvesting if a strong El Niño develops.
- Credit availability remains a concern following two consecutive years of low prices, particularly for independent producers and participants in shared plantings.
- Adverse harvest weather affected the quality of the 2025/26 crop, leaving a large proportion of the remaining stocks suitable mainly for crushing.

China

- **New-crop arrivals:** Peanut harvesting and new-crop arrivals continued across Henan, Shandong and Northeast China, although volumes remained limited in several producing areas. Wheat-stubble peanuts begin to enter the market in Henan, while larger arrivals from some Northeast areas are expected after October 10.
- **Henan prices:** On October 6, spring Baisha peanuts in Nanyang were around **RMB 4.20/kg**, with 7-screen (roughly 2.8 mm) and 8-screen (3.2 mm) selected kernels (kernels that have been sorted/graded for size and quality), removing smaller, damaged or defective kernels at **RMB 4.60/kg and RMB 4.70/kg**, respectively. New wheat-stubble Baisha in Pingdingshan was around **RMB 4.00–4.05/kg**, while mixed varieties in Xinxiang were **RMB 3.90–4.00/kg**.
- **Shandong prices:** New Baisha in Linyi was quoted at **RMB 4.00–4.10/kg**, while new Haihua was around **RMB 3.90–4.00/kg**. In Junan, 8-screen selected Haihua was **RMB 4.30–4.35/kg**, while Baisha 8-screen was **RMB 4.50–4.55/kg**.

- **Northeast China:** New 308 peanuts in Liaoning and Jilin were around **RMB 4.20–4.25/kg** for trade-grade kernels, while 8-screen selected kernels were around **RMB 4.50–4.55/kg**. Arrivals remained limited and buying interest was moderate.
- **Wholesale markets:** In Guangdong and Guangxi, Northeast 308 and Henan Baisha 8-screen kernels were around **RMB 4.80–4.85/kg**. Hunan Henan Baisha 8-screen was around **RMB 4.85/kg**, while Gangsan 25/35 was quoted at **RMB 5.00–5.10/kg**. Sales remained average.

USA

- **Harvest progress:** As of 4 October 2026, harvesting reached **22%**, up from 12% the previous week, slightly below the five-year average of 23%.
- **Crop condition:** 57% of the crop was rated good to excellent, down from 58% a week earlier; 33% was fair, and 10% poor to very poor.
- **State-wise progress:** Virginia led harvesting at 46%, while Florida remained at 24%, well below its five-year average of 45%.
- **Prices:** For the week ending 26 September, the average peanut price rose to 22.4 cents/lb, from 19.1 cents/lb the previous week. Runner peanuts averaged 21.7 cents/lb, Spanish 24.2 cents/lb and Virginia 25.3 cents/lb.
- **Farmer marketings:** Purchases from farmers increased to 186.65 million lbs, from 26.36 million lbs the previous week, with Runner peanuts accounting for the largest share.

Source: USDA, *Marketings – Quantity purchased from farmers

Peanut Condition

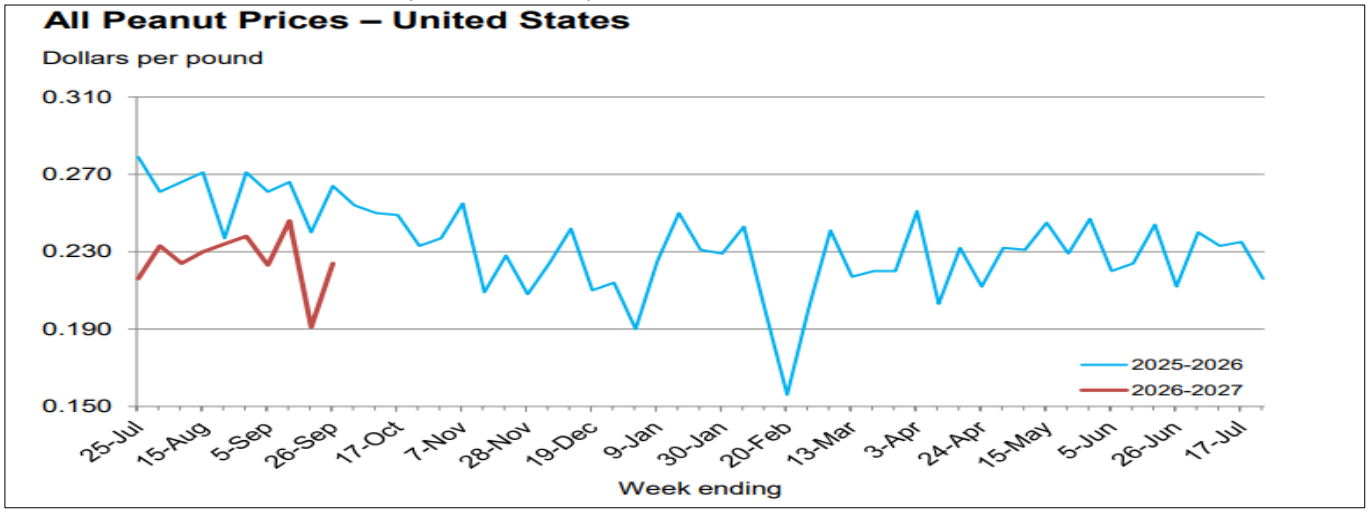
Peanut Condition – Selected States: Week Ending October 4, 2026

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

State	Very poor	Poor	Fair	Good	Excellent
	(percent)	(percent)	(percent)	(percent)	(percent)
Alabama	2	12	26	53	7
Florida	-	4	32	63	1
Georgia	1	8	35	50	6
North Carolina	-	2	13	64	21
Oklahoma	4	16	32	45	3
South Carolina	1	6	33	51	9
Texas	4	20	42	31	3
Virginia	7	12	26	48	7
8 States	1	9	33	50	7
Previous week	2	8	32	51	7
Previous year	(NA)	(NA)	(NA)	(NA)	(NA)

- Represents zero.
(NA) Not available.

All Peanut Prices – United States (Source: USDA)



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

Peanut Prices and Marketings by Type – United States: August 29, 2026-September 26, 2026

Item and type	Week ending August 29, 2026	September 5, 2026	September 12, 2026	September 19, 2026	September 26, 2026
	(dollars per pound)	(dollars per pound)	(dollars per pound)	(dollars per pound)	(dollars per pound)
Average price					
Runner	0.228	0.219	0.233	0.191	0.217
Spanish	0.325	0.280	(X)	(X)	0.242
Valencia	(X)	(X)	(X)	(X)	(X)
Virginia	0.270	0.282	0.272	(X)	0.253
All	0.238	0.223	0.246	0.191	0.224
	(1,000 pounds)	(1,000 pounds)	(1,000 pounds)	(1,000 pounds)	(1,000 pounds)
Marketings [1]					
Runner	198,771	234,165	64,341	26,355	147,541
Spanish	8,979	8,141	-	-	1,778
Valencia	-	-	-	-	-
Virginia	34,670	5,618	32,763	-	37,335
All	242,420	247,924	97,104	26,355	186,654

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

Peanut Harvest

Peanuts Harvested – Selected States

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

State	Week ending October 4, 2025	September 27, 2026	October 4, 2026	2021-2025 Average
	(percent)	(percent)	(percent)	(percent)
Alabama	(NA)	10	25	29
Florida	(NA)	20	24	45
Georgia	(NA)	11	21	22
North Carolina	(NA)	5	23	17
Oklahoma	(NA)	12	17	7
South Carolina	(NA)	13	23	21
Texas	(NA)	14	15	11
Virginia	(NA)	30	46	35
8 States	(NA)	12	22	23

(NA) Not available.

India

- Gujarat's new peanut arrivals have begun, with daily volumes reported at around 1.25–1.50 lakh bags. Early TJ varieties are arriving, while G-20, G-10, Girnar and BT-32 are expected later. Arrivals could increase over the next five to seven days if weather remains dry, with a further rise expected after Diwali.
- New-crop moisture remains high, limiting immediate crushing. Drier supplies are expected in about 10 days. Grade-24 peanuts are reportedly trading at ₹1,600–1,750 per 20 kg, while other qualities range from ₹1,350–1,550 per 20 kg.
- Trade estimates place Gujarat's crop at around 3 million tonnes, compared with 3.5–4 million tonnes last year. A clearer assessment is expected in about 15 days. Market participants expect supplies from Madhya Pradesh after Diwali to partly offset lower availability in Saurashtra.
- Groundnut oil demand remains subdued, with buyers purchasing mainly for immediate requirements. Millers expect prices to find support around ₹1,625–1,650/10 kgs, while gains beyond ₹1,700 may be limited at the start of the season.
- Peanut oil export prospects remain limited. According to millers, export viability could improve if kernel prices ease to ₹90–95 per kg.

Brazil

- **Planting:** The 2026/27 season has begun, with most sowing expected during 1–10 October. Favorable rainfall and adequate soil moisture support crop establishment in Sao Paulo.
- **Area outlook:** Seed sales indicate a potential 25–30% decline in planted area, mainly due to credit constraints. Conab's first official survey is due on 15 October.
- **Costs and financing**: Production costs remain high, with diesel above R$7.10 per litre, around 17% higher than last season. Farmers are increasingly using input barter financing, while new-crop contracts are being offered at better base prices.
- **Demand and exports:** Domestic demand remains subdued. January–August kernel exports rose 21% to 215,289 tonnes, while peanut oil exports fell 18% to 80,286 tonnes, reflecting slower Chinese buying.

Africa

- **Harvest Progress:** Peanut harvesting is beginning in parts of West Africa, with Senegal reporting early harvest activity in some production areas, while later-planted crops remain at different stages.
- **Weather:** Rainfall deficits have affected some Senegalese production areas, although renewed rainfall in early October could support later-developing crops.
- **Senegal Marketing Campaign:** The 2026/27 commercialization campaign is being prepared, with the peanut floor price targeted for October and commercial collection scheduled to begin in November.
- **Supply:** Overall African supply remains limited, with little expected from Sudan, while Nigeria has started offering new-crop material.
- **Nigeria:** High domestic prices are keeping Nigerian **38/42 and 40/50** kernels around **USD 1,400–1,500/MT** FOB.
- **Nigerian Crushing Peanuts:** Crushing peanuts are being offered at around **USD 900–1,000/MT CFR Qingdao**, making them significantly more competitive than Latin American crushing offers at around **USD 1,800–1,850/MT CFR** Qingdao.
- **Senegal:** Crude peanut oil at **2% FFA** is offered around **USD 1,775–1,825/MT CFR Qingdao**, while crushing kernels are around **USD 1,000–1,100/MT CFR** Qingdao, depending on FFA and split percentage.
- **Other African Origins:** There are currently no significant offers from Tanzania, Mozambique or Burkina Faso, leaving Nigeria and Senegal as the main active African origins.
- **Quality & Market Organization:** Mandatory grading and screening planned for the 2026/27 Senegal campaign are expected to improve quality segregation and market transparency.

STATISTICS

China Exports

Peanut exports - Top 10 Destinations

Year -2025				
Rank	**Destination**	**Qty (MT)**	**Value (USD)**	**USD/MT**
1	Indonesia	1,25,876.90	$16,33,80,000	$1,297.9
2	Viet Nam	37,987.10	$3,87,88,000	$1,021.1
3	Thailand	25,981.70	$3,76,47,000	$1,449.0

4	Philippines	12,319.00	$1,58,67,000	$1,288.0
5	Japan	11,555.70	$2,32,08,000	$2,008.4
6	Malaysia	9,838.30	$1,48,49,000	$1,509.3
7	Canada	6,914.30	$1,06,75,000	$1,543.9
8	Netherlands	6,100.30	$1,06,47,000	$1,745.3
9	Lebanon	5,313.40	$84,45,000	$1,589.4
10	U K	4,223.00	$67,41,000	$1,596.3

China Exports Jan to Jul 2025

Country	Jan		Feb		Mar		Apr		May		Jun		Jul	
	Qty (MT)	USD/MT	Qty (MT)	USD/MT	Qty (MT)	USD/MT	Qty (MT)	USD/MT	Qty (MT)	USD/MT	Qty (MT)	USD/MT	Qty (MT)	USD/MT
Viet Nam	1,484	1,248	1,281	1,293	3,185	1,244	3,266	1,177	1,970	1,080	705	1,140	1,421	1,210
Thailand	2,438	1,370	975	1,395	1,780	1,367	1,735	1,360	1,146	1,417	976	1,409	843	1,467
Japan	1,720	1,965	1,006	1,951	1,604	2,012	1,056	1,739	1,467	1,951	547	1,698	216	1,614
Philippines	727	1,230	865	1,239	875	1,309	1,711	1,330	1,162	1,248	581	1,385	703	1,371
Netherlands	1,121	1,659	1,033	1,532	1,221	1,647	835	1,650	913	1,555	551	1,620	651	1,843
Malaysia	806	1,458	610	1,487	773	1,454	851	1,451	752	1,470	449	1,465	552	1,514
Canada	960	1,492	357	1,612	958	1,579	898	1,541	730	1,515	213	1,578	215	1,718
United Kingdom	803	1,619	313	1,553	563	1,493	648	1,602	667	1,563	403	1,581	200	1,778
Jordan	176	1,491	710	1,564	232	1,470	1,344	1,384	350	1,496	222	1,462	288	1,537
Lebanon	677	1,475	112	1,346	891	1,444	162	1,528	188	1,467	168	1,594	40	1,261
Others	**3,057**	**1,510**	**2,449**	**1,486**	**3,142**	**1,519**	**2,608**	**1,461**	**2,605**	**1,433**	**1,631**	**1,459**	**1,903**	**1,521**
Total	**13,967**		**9,711**		**15,223**		**15,115**		**11,950**		**6,447**		**7,031**	

China Exports Jan to Jul 2026

Country	Jan		Feb		Mar		Apr		May		Jun		Jul	
	Qty (MT)	USD/MT	Qty (MT)	USD/MT	Qty (MT)	USD/MT	Qty (MT)	USD/MT	Qty (MT)	USD/MT	Qty (MT)	USD/MT	Qty (MT)	USD/MT
Indonesia	28,382	1,299	6,723	1,285	19,540	1,308	15,477	1,308	10,145	1,327	-		-	
Viet Nam	3,458	710	2,310	1,177	4,345	1,193	3,700	1,192	3,373	1,202	3,832	1,216	5,149	1,222
Thailand	2,671	1,468	2,098	1,484	4,135	1,464	3,185	1,480	1,418	1,402	1,443	1,436	1,990	1,421
Philippines	797	1,269	1,059	1,260	1,922	1,274	1,997	1,269	819	1,314	1,217	1,242	1,336	1,242
Japan	1,595	2,113	1,213	1,901	1,945	2,249	1,380	1,993	1,858	1,912	652	1,825	76	1,510
Malaysia	1,144	1,500	633	1,498	773	1,563	881	1,492	787	1,528	739	1,546	674	1,572
Canada	745	1,475	858	1,506	665	1,496	607	1,553	783	1,555	800	1,516	236	1,615
Lebanon	1,084	1,747	809	1,615	262	1,708	598	1,519	348	1,437	248	1,669	106	1,629
Netherlands	369	1,615	364	1,756	178	1,772	398	1,891	583	1,904	721	1,874	413	1,921
Türkiye	-		-		64	1,469	103	1,532	28	1,821	2,585	1,482	141	1,582
Others	**4,725**	**1,495**	**2,986**	**1,606**	**2,676**	**1,542**	**3,518**	**1,585**	**4,293**	**1,526**	**4,497**	**1,521**	**3,210**	**1,492**
Total	**44,969**		**19,053**		**36,504**		**31,842**		**24,433**		**16,735**		**13,330**	

Indian Key Market Statistics

Weekly Groundnut Comparison: 30 September–7 October 2026

Market	Product / Grade	30-Sep-26	07-Oct-26	Weekly Change
Gondal	Groundnut oil	1,675	1,650	−25
	Refined groundnut oil	1,660	1,630	−30
	Groundnut cake	39,000	39,000	-

Rajkot	Groundnut oil	1,660–1,680	1,650	−10 to −30
	Raw groundnut oil	1,820	1,800–1,820	Unchanged to −20
	Gujarat–Rajkot delivery oil	1,770	1,770	-
Erode	Groundnut cake, 70 kg	5,600–5,700	5,500–5,600	−100 at both ends
Gondal	Groundnut mandi price	6,200–8,500	6,500–8,000	Min +300; Max−500

Port-delivery kernel quotes

Market	Grade	30 Sept 2026	6 Oct 2026	Quote Difference
Mundra / Pipavav	50/60	10,200	10,400	200
Mundra / Pipavav	40/50	10,400	10,600	200
Mundra / Pipavav	38/42	11,000	11,000	Unchanged

Arrival comparison

Market	30-Sep	07-Oct	Change
Gondal	33,000 bags	35,000 bags	+2,000 bags

FOREX (Against USD)

Currency	Sept 30 2026	Oct 07 2026	WoW %	YTD % Change
Argentine Peso (ARS)	1524.9	1520.6	0.28%	5.06%
Brazilian Real (BRL)	5.2019	4.9816	4.42%	-5.04%
Chinese Yuan (CNY)	6.7046	6.7046	0.00%	-4.13%
Indian Rupee (INR)	95.952	97.033	-1.11%	6.65%
Mozambican Metical (MZN)	63.89	63.89	0.00%	0.42%
Nigerian Naira (NGN)	1328.545	1328.62	-0.01%	-8.15%
Sudanese Pound (SDG)	601.5	600.2207	0.21%	0.24%
Tanzanian Shilling (TZS)	2652.5	2630	0.86%	7.83%
Euro (EUR)	0.8802	0.8936	-1.50%	3.38%
West African CFA (XOF)	575.5	583.143	-1.31%	2.95%
Turkish Lira (TRY)	49.0175	49.1977	-0.37%	13.90%

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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