July 8th,2026

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GLOBAL Peanut weekly

Market Insights

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SUMMARY

USA: Crop condition softened to 59% G/E (from 62%), prices fell to $0.212/lb (-13.1% WoW), pegging jumped to 51% (on pace).

China: Futures pulled back 2.0-2.4% across the curve after a 7-day rally; spot flat, mills running at just 8.4% capacity.

India: Seed rates firmed sharply (+1-8% WoW) as a ~50% crop shortfall in South India and UP drives buyers to Gujarat.

South Africa: 2026 crop tracking ~12% below official estimate (50,000 MT vs. 57,000 MT) on aflatoxin-related quality losses, likely triggering imports.

Nigeria: Secured 0% import duty into China, but demand stayed weak on cheap Henan-origin supply.

EU: Demand shifting to larger counts (30/35, 38/42) at $1,555-1,690/MT CIF; bird feed market quiet on European heatwaves; strict 4µg/kg aflatoxin limit remains the key market-access gatekeeper.

CHINA

Futures (Zhengzhou Commodity Exchange, PK2610 contract) The peanut futures contract broke a seven-session winning streak, closing down 0.70% to 8,490 yuan/ton with open interest slightly lower. Earlier in the week price action had been firmer, with the same contract gaining more than 1% at one point on light divergence between bulls and bears.

Spot market common-grade peanut kernels Nationally, the average price for common-grade ("tonghuo") peanut kernels held steady around 7,536 yuan/ton, with producing regions showing mixed moves:

- Henan (Baisha variety): ~3.4–3.6 yuan/jin for common kernels; premium 8-sieve kernels 3.95–4.0 yuan/jin in Nanyang, common white-sand kernels traded around 3.5 yuan/jin with premium sieved kernels near 3.95–4.0
- Northeast (Liaoning Tieling, Jilin): 308 variety common kernels around 4.0–4.1 yuan/jin, premium sieved kernels 4.4+ yuan/jin
- Jiangsu, Anhui, Hubei: prices broadly stable, trading thin, with holders reluctant to sell at current levels

Byproducts

- Oil mill procurement price for oil-stock kernels held at 7,454 yuan/ton with strict quality control on intake.
- First-grade peanut oil ex-factory price was flat at 14,213 yuan/ton, with wide bid-ask room on actual deals.
- Peanut meal average price slipped 10 yuan to 2,890 yuan/ton, with the premium over soymeal/rapeseed meal narrowing as those prices rose.

Market tone

Remaining old-crop stock in producing areas is clearing slowly, food-processing plants are running below capacity, and there's no clear bullish catalyst - the near-term bias is toward a weaker, range-bound spot market. Separately, wider Mysteel tracking shows peanut oil plant operating rates running low (around 8.4%), with most large plants not yet back online.

Traders - Futures and spot have diverged (futures pulled back after 7 up days; spot is flat-to-soft). That basis gap is the trade to watch this week rather than chasing the futures move directly. Watch Henan/Shandong new-crop arrivals - any acceleration there is the likely trigger for the next leg down in spot.

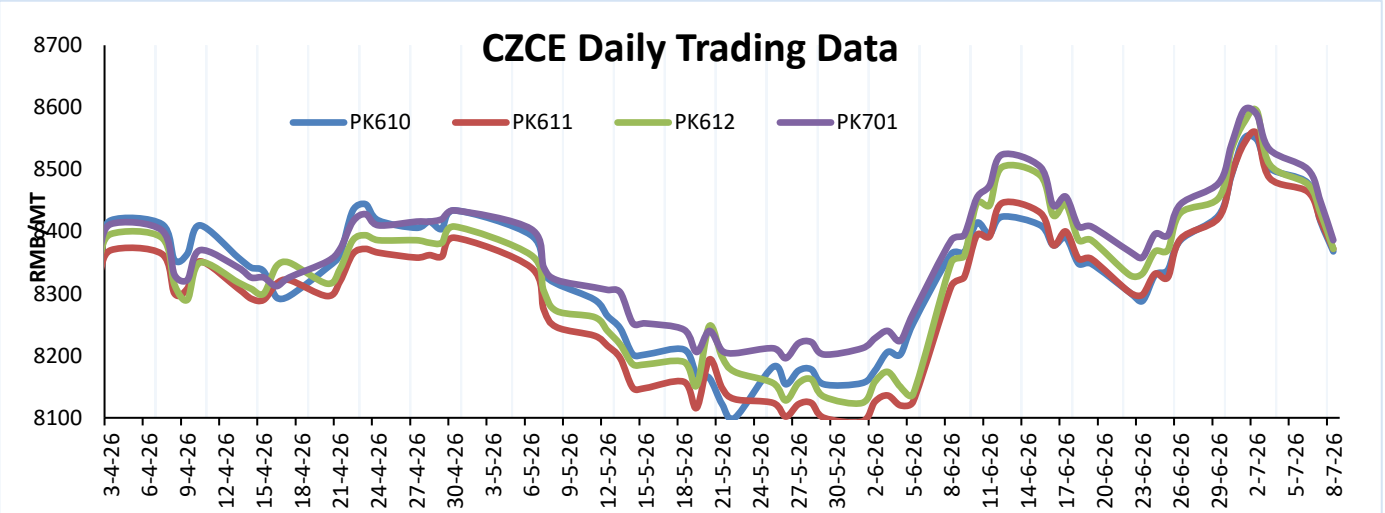
Zhengzhou Commodity Exchange Data

CZCE Daily Trading Data (08-07-2026)											
Contract Month	Prev. Settle	Open	High	Low	Close	Settlement	Change	Volume	Open Interest	OI Change	Turnover
PK610	8,416	8,376	8,396	8,328	8,350	8,368	-48	1,03,190	2,00,113	-13,045	4,31,699
PK611	8,418	8,380	8,398	8,340	8,346	8,372	-46	95,249	1,66,730	-5,795	3,98,665
PK612	8,430	8,380	8,404	8,346	8,352	8,372	-58	43,055	51,310	820	1,80,224
PK701	8,448	8,402	8,420	8,362	8,374	8,386	-62	1,112	5,984	177	4,662
Total								2,42,606	4,24,137	-17,843	10,15,250

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



Week-on-Week (2026)

Contract	1st July	8th July	% Change
Oct	8,550	8,368	-2.1%
Nov	8,542	8,372	-2.0%
Dec	8,576	8,372	-2.4%
Jan	8,596	8,386	-2.4%

Year-on-Year

Contract	8th July 25	8th July 26	% Change
Oct	8,106	8,368	3.23%
Nov	7,914	8,372	5.79%
Dec	7,908	8,372	5.87%
Jan	7,914	8,386	5.96%

(Source: Zhengzhou Commodity Exchange)

INDIA

Sowing: As per Ministry of Agriculture, GOI area under khariff Groundnut as on 5/7/26 is 16.93 lakh hectares as compared to 28lakh hectares. Down by 11.07% during same period last season.

UP ~70% done, on track to finish this week, roughly flat vs. last year. Gujarat running 15 days late, also expected flat.

Prices — firming across the board:

- UP (Mainpuri): ₹7,000-8,000/quintal, up from ₹106-107 to ₹115-116; crop down ~50% y/y
- UP (Jhansi): ₹5,500-5,800/quintal (common), arrivals declining fast
- Gujarat (TJ): ₹120-122/kg, up from ₹115-116
- Gujarat (Java, 50-60 count): ₹139-140/kg, up from ₹130-132
- Kernels to South India: new stock ₹130/kg vs. old stock ₹104-105/kg

South India's crop is also down ~50%, so southern buyers are actively bidding into Gujarat — that's pushing prices more than anything else right now.

Government stock: Gujarat ~9.3 lakh t, Rajasthan ~1.5 lakh t. Offer price up to ₹6,850/quintal from ₹6,650 — but mills can't crush profitably at that level, so it's sitting largely untouched.

Exports: Minimal. Indonesia quota unlikely before August; even then, exports would wait for the new Kharif crop. Potential +₹4-5/kg if that demand shows up.

Outlook: Mainpuri arrivals (15 days of supply left), southern buying pace in Gujarat, and any cut to the government offer price.

Tightening market, both UP and South India short, Gujarat filling the gap but its own crop was light too. Bias is firm with upside risk, not range-bound.

USA

Crop Conditions

- The nation's peanut crop showed a modest step back this week. Across the eight states that account for 95% of 2025 plantings, 59% of the crop was rated Good to Excellent, slipping from 62% a week earlier and running well behind the 75% mark recorded at this point last year.
- Virginia remains the standout, with 78% of its crop in the top two categories, and Texas follows at 59%. On the other end, Oklahoma carries the heaviest burden of poor conditions, with 15% of its acreage rated Very Poor or Poor combined.
- North Carolina stands out for a relatively high Excellent rating of 21%, even though more than a third of its crop sits in the Fair category.

Prices

- Peanut prices have spent most of the 2025-2026 marketing year below year-ago levels, and this week was no exception. The all-type average settled at $0.212 per pound for the week ending June 27, down from $0.244 the week before.
- Looking back over the season, prices bottomed out near $0.155 per pound in late February before climbing back into a $0.21 to $0.24 trading range, though they remain roughly 15 to 20 percent below where they stood a year earlier.
- Runner type made up nearly all reported marketings in the latest week, while Spanish and Virginia types traded only intermittently, reflecting their smaller and less consistent presence in the weekly data.

Marketings

- Volume moving through the market has been fairly consistent recently, holding between 82,000 and 87,000 thousand pounds per week since the start of June, aside from a lighter 70,949 thousand pounds reported in the final week of May.
- This steady flow suggests farmers have continued moving peanuts into the pipeline at a regular clip even as prices softened.

Pegging

- Pegging activity accelerated noticeably this week, rising from 38% to 51% across the eight states right at the five-year average for this point in the season.
- Georgia and South Carolina are ahead of the pack at 62% and 61% pegged, while Texas lags well behind at just 16%.
- The jump signals the crop is advancing toward maturity on a normal schedule, and harvest-related deliveries should begin picking up in earnest over the next several weeks.

Outlook

- Conditions are softer than a year ago, but the crop's development timeline remains on track, and prices, while below last year, have shown some stability after the February dip.
- The next few weeks of pegging and condition data will be the key indicators of whether this season closes the gap with last year's stronger crop or falls further behind.

Peanut Conditions – United States

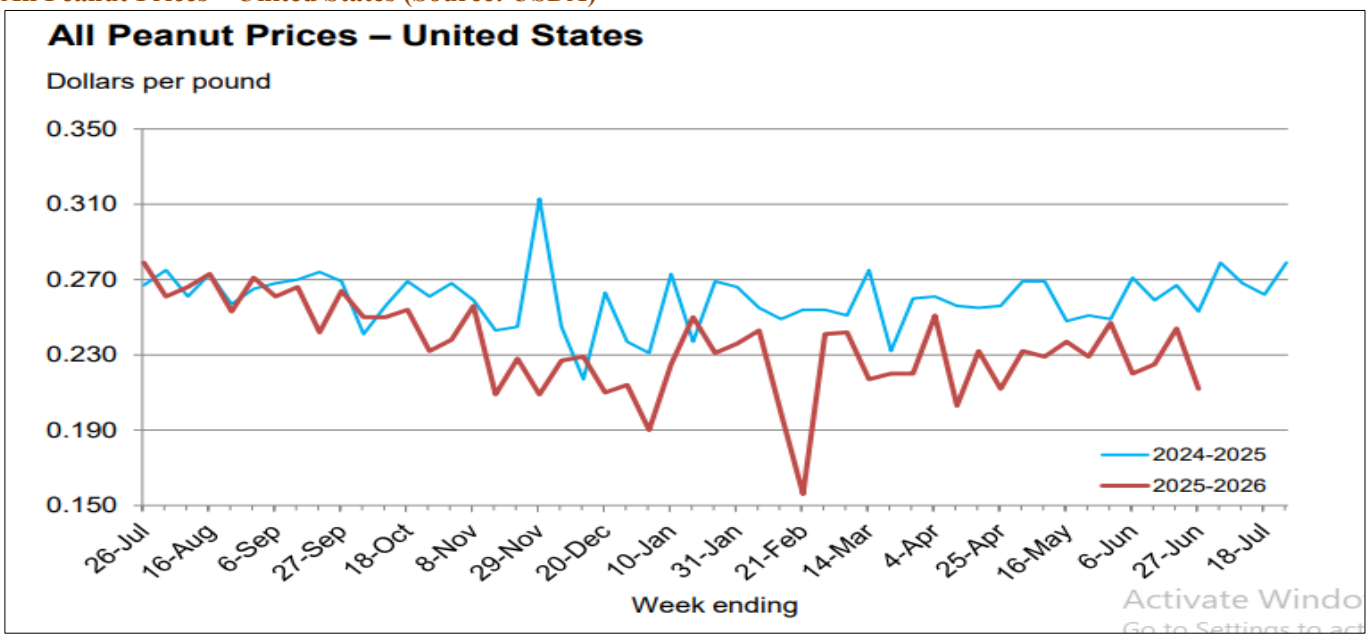
Peanut Condition – Selected States: Week Ending July 5, 2026

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

State	Very poor	Poor	Fair	Good	Excellent
	(percent)	(percent)	(percent)	(percent)	(percent)
Alabama	-	5	22	69	4
Florida	-	4	36	60	-
Georgia	1	7	35	51	6
North Carolina	1	5	37	36	21
Oklahoma	3	12	31	51	3
South Carolina	-	8	29	58	5
Texas	-	1	40	59	-
Virginia	-	3	19	78	-
8 States	1	6	34	54	5
Previous week	2	6	30	56	6
Previous year	-	3	22	64	11

- Represents zero.

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: May 30, 2026-June 27, 2026

Item and type	Week ending May 30, 2026	June 6, 2026	June 13, 2026	June 20, 2026	June 27, 2026
	(dollars per pound)	(dollars per pound)	(dollars per pound)	(dollars per pound)	(dollars per pound)
Average price					
Runner	0.235	0.215	0.225	0.238	0.212
Spanish	(X)	0.332	(X)	0.291	(X)
Valencia	(X)	(X)	(X)	(X)	(X)
Virginia	0.269	0.286	(X)	0.251	(X)
All	0.247	0.220	0.225	0.244	0.212
	(1,000 pounds)	(1,000 pounds)	(1,000 pounds)	(1,000 pounds)	(1,000 pounds)
Marketings [1]					
Runner	45,302	79,859	87,167	55,749	82,514
Spanish	-	2,206	-	4,092	-
Valencia	-	-	-	-	-
Virginia	25,647	1,764	-	22,986	-
All	70,949	83,829	87,167	82,827	82,514

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

Peanut Pegging

Peanuts Pegging – Selected States

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

State	Week ending July 5, 2025	June 28, 2026	July 5, 2026	2021-2025 Average
	(percent)	(percent)	(percent)	(percent)
Alabama	39	31	46	43
Florida	64	37	55	59
Georgia	66	50	62	63
North Carolina	45	28	47	42
Oklahoma	9	5	13	14
South Carolina	48	39	61	57
Texas	17	10	16	12
Virginia	30	24	43	40
8 States	53	38	51	51

SOUTH AFRICA

2026 Crop Estimate

- Official 2026 crop estimate remains at 57,000 MT of kernels.
- Harvesting has progressed well, with **85–90% of the crop already completed** under favorable field conditions.

Quality Concerns and Pricing

- Rainfall during harvest has adversely affected both kernel quality and yields, raising concerns over **increased aflatoxin levels**.
- As a result, industry participants now expect the final crop to land closer to **50,000 MT** significantly below the official estimate.
- The expected shortfall is likely to require **peanut imports** to meet domestic demand.
- A clearer picture on final crop size, quality, and import needs is expected by **end of July 2026**, once harvesting and post-harvest assessments are complete.

- No current offer price reported (RSA marked "$NA" in the pricing snapshot table), likely reflecting the ongoing uncertainty around crop size and quality.

Source: Other Industry Sources

NIGERIA

Production & Global Standing

- Production has grown ~51% over the past decade, driven by acreage expansion and government programs (Farm Input Support Programme/NADF, export incentives, AFAN efforts, duty-free machinery imports).
- Despite this scale, Nigeria contributes **less than 1%** of global peanut exports — the market remains overwhelmingly domestic-consumption driven.

Domestic Consumption, Trade & Export Developments

- Nigeria has secured **0% import duty access into China**, removing the prior 10% tariff and putting it on equal footing with Senegal. This is seen as a potentially major catalyst for export growth, farmer incomes, and processing investment.
- However, demand into China stayed weak this month even with the duty benefit — ample Henan-origin supply pushed Chinese blanching prices down over $50/MT in 10 days, so Nigerian offtake hasn't picked up yet.
- Export volumes (peanut oil and processed peanuts) have shown no significant growth trend historically, and carry-forward stocks remain consistently low, reflecting strong domestic offtake rather than export orientation.
- Nigeria has one of the highest per-capita peanut consumption rates globally (~20+ kg/year), fueled by snacks, edible oil, peanut butter, and traditional foods.

Regional Supply

- Nigeria, alongside Mozambique and Tanzania, holds abundant peanut supplies, but Nigeria's export competitiveness stays limited by domestic absorption.
- With Indonesia largely out of the import market and China unlikely to absorb much more volume, African exporters (including Nigeria) face the challenge of finding new outlets for surplus.

EUROPEAN UNION

Demand (Human Consumption & Bird Feed)

- Demand shifted toward **larger peanut counts** particularly 30/35 and 38/42 raw and blanched peanuts sourced from India, China, and Argentina.
- Buyers are targeting price levels of **USD 1,555–1,690/MT CIF**.
- The **bird feed market stayed quiet**, likely due to prolonged heatwaves across Europe (30–40°C in many regions), which reduced seasonal consumption. This could translate into pent-up demand once temperatures ease.
- Current bird feed buying interest sits at **USD 875–925/MT CIF**, though sellers are largely unwilling to sell at these levels a standoff between buyer and seller expectations. Softer freight rates and increased supply could help narrow the gap.

Non-EU Europe & CIS (adjacent market)

- Demand from Turkey, Ukraine, Russia, and neighbouring countries stayed steady in June, with active quotation-seeking.
- Trading activity is expected to gain momentum in **July–August** as buyers adjust to new price and freight levels.
- Demand from Iran via Turkey rose notably over the past 2–3 weeks, driven by higher freight costs to Bandar Abbas versus more competitive rates to Mersin.
- Russia is positioning to increase purchases from the upcoming Argentina and Brazil crop — signaling stronger import activity ahead.

Regulatory Standard (Aflatoxin)

- The EU maintains a **total aflatoxin limit of 4 µg/kg** for peanuts intended for direct human consumption — among the **strictest limits globally** (compared to 10–20 µg/kg in most other major markets like the US, Japan/South Korea, Russia/Singapore, Malaysia/Indonesia, Thailand).
- This strict threshold is framed as a major competitive gatekeeper: meeting it (vs. looser limits elsewhere) can determine whether a shipment reaches a premium market at all.

STATISTICS

Key Market Statistics

CHINA (As of July 7)

Purchase price of Baisha Peanuts 3.40-3.70 yuan/jin

Area	Price (Yuan/Jin)	Change
Zhumadian	3.40-3.60	Stable for now
Nanyang	3.40-3.70	Stable for now
Zhengyang	3.50-3.60	Stable for now

Wholesale Market Price Reference

Market	Price
Huanghuai Agricultural Products Market	9.70 yuan/kg
Changzhi Zifang Agricultural Products Market	13.00 yuan/kg
Handan Nandabao Vegetable Wholesale Market	5.60 yuan/kg
Fuyu Sanjingzi Market	8.00-8.20 yuan/kg

INDIA

Kernel Prices (Processed)

Kernel Type	Destination	Price
New Mainpuri kernels	South India	₹130/kg
Old-stock kernels	South India	₹104–105/kg

Arrivals & Spot Prices

Location	Arrivals	Price Range	vs. Season Open
Jhansi, UP (common)	3,000–4,000 bags/day, declining	₹5,500–5,800/qtl	—
Jhansi, UP (seed-quality)	—	₹6,000–7,000/qtl	—
Mainpuri, UP (all centers)	20,000–25,000 bags	₹7,000–8,000/qtl(~₹500 above MSP)	Up from ₹106–107 → ₹115–116 (local)
Mainpuri, UP (coarse/winter seed)	—	₹105–106/kg	Up from ₹100–101/kg
Banas kantha, Gujarat — TJ quality	Season-end	₹120–122/kg (50-60 count: ₹128–129)	Up from ₹115–116 (dipped to ₹113–114 mid-season)
Banas kantha, Gujarat — Java quality	Season-end	80-90 count: ₹123–124; 50-60 count: ₹139–140	Up from ₹110–120 and ₹130–132 respectively

Groundnut Seed Rate

Market	Origin	Variety	Count	01-July Min	01-July Max	08-July Min	08-July Max	WoW Change	WoW % Change
Hyderabad	Telangana	Java	60/65	12,700	12,700	13,400	13,400	700	5.51%
Hyderabad	Gujarat	Bold	50/60	10,400	10,400	10,500	10,500	100	0.96%
Hyderabad	Rajasthan	Bold	40/50	10,600	10,600	10,700	10,700	100	0.94%
Hyderabad	Gujarat	Java	80/90	11,800	11,800	12,500	12,500	700	5.93%
Hyderabad	MP/UP	TJ	50/60	11,200	11,200	11,600	11,600	400	3.57%
Hyderabad	Banaskantha	TJ	50/60	12,700	12,700	12,800	12,800	100	0.79%
Chennai/Mumbai	Telangana	Java	60/65	12,700	12,700	13,400	13,400	700	5.51%
Chennai/AP	AP	Java	80/90	11,800	11,800	12,700	12,700	900	7.63%
Keshod	Gujarat	Java	50/60	12,700	12,700	13,300	13,300	600	4.72%
Keshod	Gujarat	Java	80/90	11,800	11,800	12,500	12,500	700	5.93%
Keshod	Gujarat	Bold	40/50	10,600	10,600	11,300	11,300	700	6.60%
Keshod	Gujarat	Bold	38/42	11,000	11,000	11,300	11,300	300	2.73%

FOREX (Against USD)

Currency	July 1, 2026	July 8, 2026	WoW %	Year to Date % Change
Argentine Peso (ARS)	1483.97	1,492.01	0.54%	2.79%
Brazilian Real (BRL)	5.162	5.1587	-0.06%	-5.83%
Chinese Yuan (CNY)	6.7943	6.7967	0.04%	-2.82%
Indian Rupee (INR)	95.337	95.623	0.30%	6.29%
Mozambican Metical (MZN)	63.93	63.89	-0.06%	0.42%
Nigerian Naira (NGN)	1378.47	1375.48	-0.22%	-4.91%
Sudanese Pound (SDG)	600.1707	600.2207	0.01%	0.02%
Tanzanian Shilling (TZS)	2625.03	2623.85	-0.04%	6.66%
Euro (EUR)	0.8779	0.8761	-0.21%	2.90%
West African CFA (XOF)	574.932	574.995	0.01%	2.86%
Turkish Lira (TRY)	46.6736	46.8573	0.39%	8.88%

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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