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Market Insights

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SUMMARY

USA: US peanut production is expected to decline in 2026, but carryover stocks should support supply despite weather and quality risks.

China: China's peanut exports remain firm, while imports face limited growth amid adequate domestic supply, weak demand and supportive production policies.

India: India's 2026/27 peanut crop outlook remains positive, supported by strong exports and processing demand, but weather risks may affect yields and kernel quality.

Brazil: Brazil's peanut exports are growing strongly, with 2026/27 production estimated at 907,000 MT, while high financing costs, weather and weak prices remain key challenges.

WSPC 2026 – HIGHLIGHTS 2026

SUPPLY

USA



Ms Louise McKerchar, Vice President, American Peanut Council

Ms Louise McKerchar highlighted that the United States is the world's fourth-largest peanut producer, with approximately 75% of production consumed domestically. Peanut butter represents around 60% of domestic peanut consumption, followed by snack peanuts and confectionery products. The remaining 25% is exported, mainly to Mexico, Canada, Europe, China and Japan.

US peanut acreage for 2026 is expected to decline by approximately 28%, with production forecast to fall by nearly 25% from the record 2025 crop. However, strong carryover inventories from the previous season are expected to provide adequate supplies for both domestic consumption and export markets.

Weather remains the key risk. Extreme heat has accelerated soil-moisture depletion, particularly in dryland areas, while irrigated fields have generally performed better. Disease pressure, including tomato spotted wilt virus, has also increased in some regions. Despite these challenges, approximately 64% of the crop was rated good to excellent by mid-August.

Market Outlook: The final US peanut balance will largely depend on weather conditions, harvested yields and crop quality during the remaining weeks ahead of harvest.

India



Mr Khushwant Jain, Owner, G.S. Exports

Mr Khushwant Jain highlighted India's strong position as a major groundnut producer and exporter, supported by multiple crop seasons, diverse varieties and an expanding processing sector. Around 80% of production comes from the Kharif crop, while Rabi and summer crops help maintain year-round availability.

India produces a wide range of non-GMO varieties, including Java, Bold, Runner, Red and high-oleic groundnuts. Domestic demand is gradually shifting from traditional oil crushing towards direct consumption and value-added products, including peanut butter, healthy snacks and protein bars.

India exported approximately 746,000 MT in 2024/25, followed by around 664,000 MT in the subsequent year. Tighter import controls in Indonesia affected shipments, while Malaysia, UAE, Turkey and Bangladesh emerged as growing destinations. Vietnam continued to remain a key export market for Indian groundnuts.

For 2026/27, the Kharif crop was initially estimated at 7.2–7.5 million tonnes, with potential for an upward revision if September weather remains favourable. However, heat stress and uneven rainfall could affect yields and increase the availability of smaller-count kernels.

Market Outlook: India's modern processing infrastructure, mandatory export testing and expanding capabilities in peanut butter, blanched kernels, roasted products and peanut oil are strengthening its competitiveness. Final crop size and kernel quality will depend significantly on September weather and harvesting conditions.

China



Mr Kobe He, CFNA

Mr Kobe presented an overview of China's peanut production, imports, exports and evolving government policies. China's export performance remained positive, supported by domestic availability, competitive pricing and strong demand for food-grade peanuts, particularly from Southeast Asian markets.

China's peanut imports have declined from the exceptionally high levels recorded in 2020 and 2021. Future import

requirements will depend on several factors, including domestic crop output, crushing margins, global prices, exchange rates, freight costs and geopolitical developments.

Government policy continues to encourage expanded peanut and oilseed production to strengthen domestic edible-oil security. Meanwhile, China is diversifying its international sourcing base. African peanuts remain attractive for crushing due to their relatively high oil content, low moisture and competitive pricing, while duty-free access for several African origins could further improve their competitiveness.

Argentina, Brazil and the United States are expected to remain important suppliers of premium food-grade peanuts, while India, Africa and South America will continue competing in the crushing and peanut-oil segments.

Market Outlook: China's crop size and quality will become clearer following the September–October harvest. Import opportunities could emerge if domestic production or quality falls short of expectations; however, weak immediate growth in domestic demand may limit significant import expansion.

Brazil



Mr Jose Rossato Chairman of Peanut Chamber and Board Member in Coplana

Mr Jose Rossato highlighted Brazil's rapid emergence as a major player in the international peanut industry. Over the past decade, kernel exports have approximately tripled, while peanut-oil exports have increased fourfold. China has become Brazil's second-largest kernel destination and accounts for around 95% of Brazilian peanut-oil exports.

During January–July 2026, Brazil exported approximately 200,000 MT of kernels, up 26% year-on-year. Peanut-oil exports, however, declined by around 20%, resulting in combined kernel and oil exports being approximately 8% higher year-on-year.

For 2026/27, Brazil's peanut area is forecast at around 208,000 ha, with an average yield of 4.3 MT/ha. Production is estimated at approximately 907,200 MT in-shell, equivalent to around 690,000 MT of kernels.

The sector faces three key challenges: uncertain weather, subdued market prices and high financing costs, with Brazilian interest rates around 14%. These factors are limiting farmers' willingness to expand acreage.

Market Outlook: Despite near-term challenges, Brazil has significant long-term growth potential. Peanut cultivation is expanding beyond São Paulo into new producing states, while conversion of pastureland provides scope for further agricultural expansion without encroaching on native vegetation.
Brazil's established strength in global agriculture positions it to become a substantially larger supplier in the international peanut market.

STATISTICS

Prices

Week-on-Week (2026)				Year-on-Year			
Month	02nd Sept 26	09th Sept 26	% Change	Month	09th Sept 25	09th Sept 26	% Change
Oct	7,940	8,020	1.0%	Oct	7,926	8,020	1.2%
Nov	7,988	8,086	1.2%	Nov	7,830	8,086	3.3%
Dec	8,028	8,154	1.6%	Dec	7,844	8,154	4.0%
Jan	8,086	8,224	1.7%	Jan	7,860	8,224	4.6%

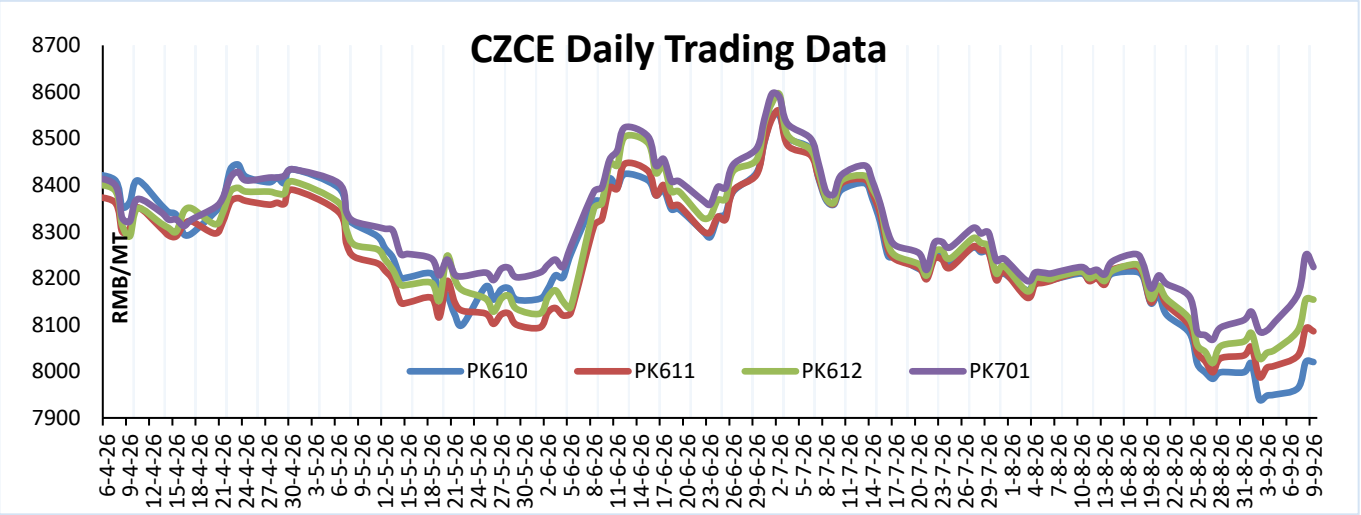
Zhengzhou Commodity Exchange Data

CZCE Daily Trading Data (09-09-2026)											
Contract Month	Prev. Settle	Open	High	Low	Close	Settlement	Change	Volume	Open Interest	OI Change	Turnover
PK610	8,020	8,062	8,064	7,986	7,994	8,020	0	8,302	27,426	-1,947	33,286
PK611	8,092	8,140	8,140	8,040	8,048	8,086	-6	1,82,128	2,05,996	-5,378	7,36,379
PK612	8,154	8,194	8,198	8,092	8,102	8,154	0	88,544	68,729	531	3,60,947
PK701	8,250	8,262	8,270	8,170	8,182	8,224	-26	8,343	15,604	238	34,304
Total								2,87,317	3,17,755	-1,639	11,64,917

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)

Indian Key Market Statistics

Market	Origin	Variety	Count	02-Sept Min	02-Sept Max	09-Sept Min	09-Sept Max
Hyderabad	Telangana/AP	Java	60/65	13,900	14,300	-	-
Chennai/Mumbai	Telangana	Java	60/65	13,500	13,600	-	-
Chennai/AP	AP	Java	80/90	13,100	13,400	-	-
Keshod	Gujarat	Java	50/60	-	-	12,700	12,700
Keshod	Gujarat	Java	80/90	-	-	12,500	12,500
Keshod	Gujarat	Bold	38/42	11,000	11,000	11,100	11,100

FOREX (Against USD)

Currency	Sept 02, 2026	Sept 09 2026	*WoW %*	YTD % Change
Argentine Peso (ARS)	1510.75	1511.58	0.05%	4.14%
Brazilian Real (BRL)	5.0912	5.0855	-0.11%	-7.16%
Chinese Yuan (CNY)	6.7192	6.7082	-0.16%	-4.08%
Indian Rupee (INR)	94.975	94.995	0.02%	5.59%
Mozambican Metical (MZN)	63.57	63.89	0.50%	0.42%
Nigerian Naira (NGN)	1327.66	1322.37	-0.40%	-8.58%
Sudanese Pound (SDG)	600.1707	600.2207	0.01%	0.02%
Tanzanian Shilling (TZS)	2650	2640.01	-0.38%	7.32%
Euro (EUR)	0.8629	0.8602	-0.31%	1.03%
West African CFA (XOF)	566.5	563.852	-0.47%	0.87%
Turkish Lira (TRY)	48.2884	48.4774	0.39%	12.65%

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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