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Market Insights

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SUMMARY

USA: Peanut pegging reached 94%, but crop quality remains below last year; prices strengthened while farmer selling slowed.

China: Prices firmed on strong imports and lower stocks, but weak demand and negative crushing margins kept the market neutral.

India: Higher crops in Rajasthan and UP may offset Gujarat's 15–20% decline, while tight supply and Indonesia demand support firm, range-bound prices.

Argentina: Harvest is 85% complete, but humidity and 27% lower acreage threaten yield and quality, while tight supply is driving prices higher.

Brazil: Tight margins and credit constraints threaten a 30% planting decline, while Jan–Jun peanut exports rose 30% YoY despite lower peanut oil exports.

CHINA

- **Prices:** Domestic general-grade peanut prices rose **3.14% WoW to ¥7,715/MT**, while oilseed peanuts remained stable at **¥7,454/MT**. Imported Sudan peanuts were around **¥8,100/MT**.
- **Supply:** Old-crop stocks are nearing depletion, while **new-crop peanuts have started entering the market in small quantities**. Oil-mill peanut inventories fell **8% WoW to 229,560 MT**.
- **Demand:** Crushing demand remains weak, with the operating rate declining to **20.57%**. Crushing margins turned negative at **-¥16/MT**.
- **Imports:** January–June peanut imports reached **196,300 MT**, up **103,700 MT YoY**, indicating strong import activity despite subdued domestic demand.
- **Weather:** Heavy rainfall across major growing regions remains a key risk for the developing new crop.

Prices

Week-on-Week (2026)				Year-on-Year			
Month	05th Aug	12th Aug	% Change	Month	12th Aug 25	12th Aug 26	% Change
Oct	8200	8200	0.00%	Oct	8,078	8200	1.51%
Nov	8190	8200	0.12%	Nov	7,930	8200	3.40%
Dec	8200	8206	0.07%	Dec	7,944	8206	3.30%
Jan	8212	8218	0.07%	Jan	7,956	8218	3.29%

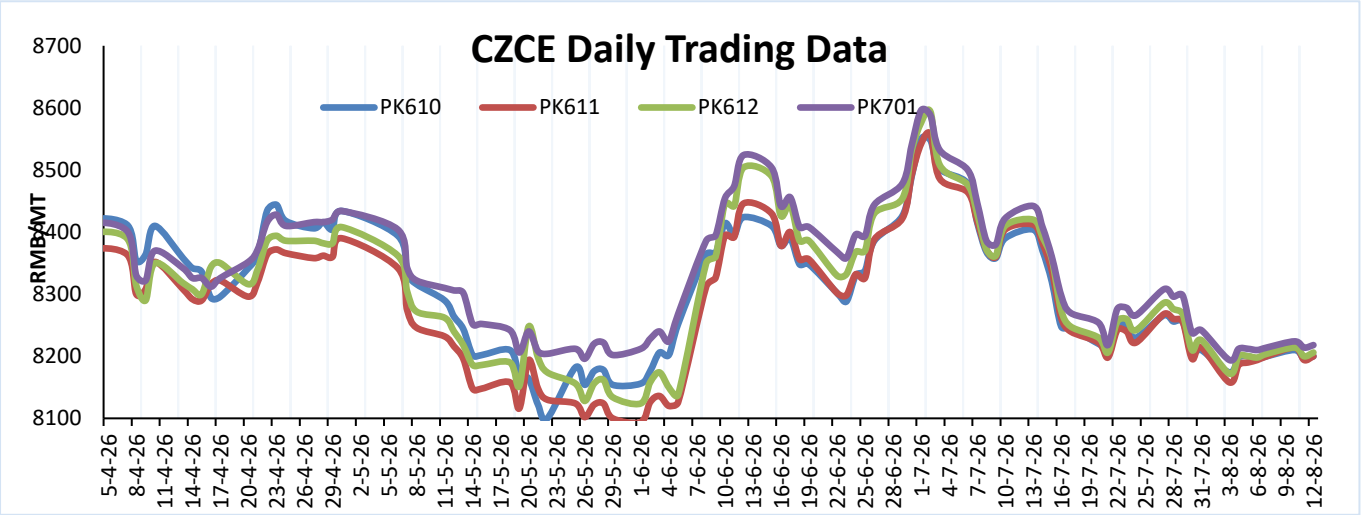
Zhengzhou Commodity Exchange Data

CZCE Daily Trading Data (12-08-2026)											
Contract Month	Prev. Settle	Open	High	Low	Close	Settlement	Change	Volume	Open Interest	OI Change	Turnover
PK610	8,196	8,202	8,208	8,188	8,198	8,200	4	9,844	78,679	746	40,359
PK611	8,194	8,180	8,214	8,180	8,202	8,200	6	72,683	2,07,454	-7,132	2,98,010
PK612	8,200	8,204	8,216	8,194	8,204	8,206	6	24,877	53,426	-40	1,02,062
PK701	8,214	8,208	8,226	8,204	8,216	8,218	4	599	4,269	170	2,461
Total								1,08,003	3,43,828	-1,564	4,42,892

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)

ARGENTINA

Production Outlook:

The 2026 Argentine peanut crop is approximately 85% harvested, with harvesting still progressing slowly.

Humid weather continues to affect the main growing regions, raising concerns over both yield and quality. The impact is expected to be significant, particularly following a 27% reduction in planted area.

Market & Demand:

Buyers are actively purchasing lower-priced small-count peanuts, tightening availability and pushing prices higher.

Prices for 38/42 and 40/50 blanched kernels have also increased, with current CFR Rotterdam indications at around $1,665/MT and $1,565/MT, respectively.

BRAZIL

Crop Outlook:
The exchange rate continues to pressure Brazilian shellers, with higher selling prices needed to improve margins. However, growers remain focused on recovering their production costs, creating a stalemate between farmers and shellers.
Unless peanut prices rise significantly and rapidly, market participants expect next-season plantings to decline by up to 30%, amid tighter credit availability and elevated farmer debt levels.

Weather:
A severe windstorm recently affected the Dumont, Jaboticabal, and Ribeirão Preto regions, damaging infrastructure at several prominent shelling facilities.
The full extent of the damage remains unclear, but estimates suggest that 20,000–30,000 MT of warehouse capacity could have been affected.

Export Performance – June 2026:

- **Peanuts:** June exports reached 40,500 MT, up 66% YoY from 24,442 MT. Major destinations included Algeria (11,230 MT), Russia (9,390 MT), the EU (5,230 MT), Egypt (2,680 MT), South Africa (3,105 MT), Ukraine (1,220 MT), Colombia (1,520 MT), and Mexico (509 MT).

- **Peanut Oil:** June exports declined to 13,416 MT, compared with 20,977 MT a year earlier. China accounted for 11,608 MT, while Italy received 1,690 MT.
- **Jan–Jun 2026:** Peanut exports totaled 158,670 MT, up 30% YoY from 122,350 MT. In contrast, peanut oil exports declined 15% YoY to 64,399 MT, compared with 76,061 MT in the same period last year.

USA

Crop Progress:

Peanut pegging in the eight major producing states reached **94% as of August 9, 2026**, matching the level recorded a year earlier and slightly above the **2021–2025 average of 93%**. North Carolina and South Carolina reached 100% and 99%, respectively, while Oklahoma remained the slowest at 82%.

Crop Condition:

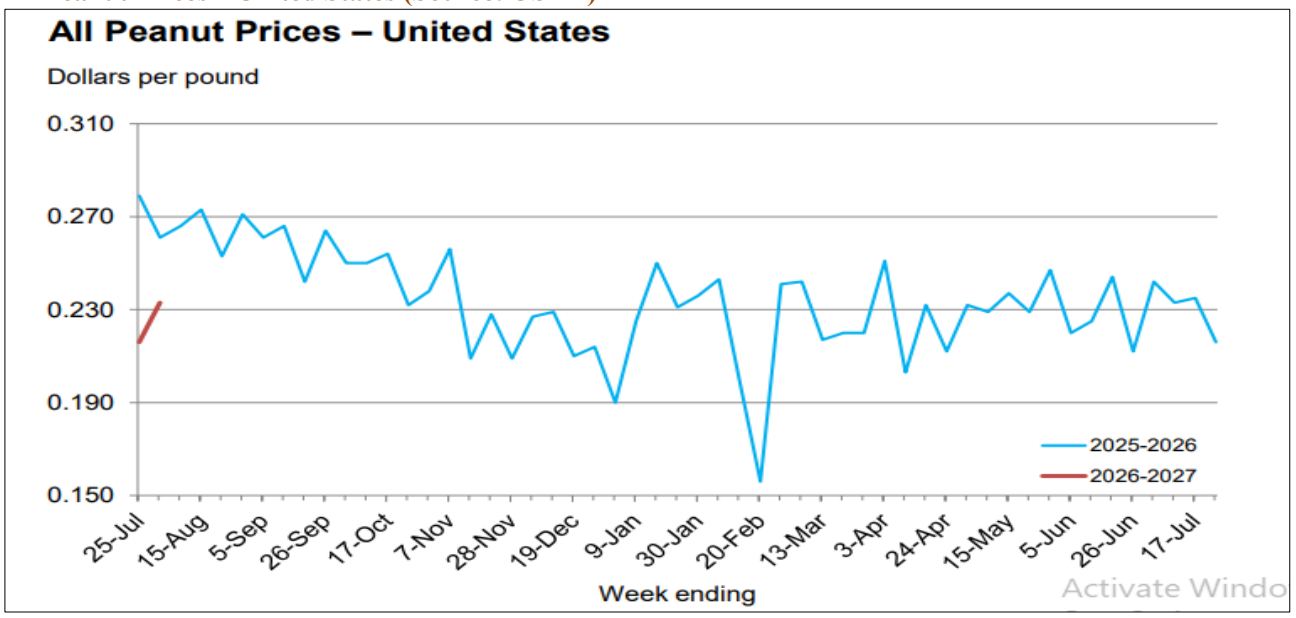
Overall crop condition was rated **56% Good and 8% Excellent**, with **29% Fair, 6% Poor, and 1% Very Poor**. Although the combined Good/Excellent rating remained unchanged from the previous week at 64%, it was below the **74% recorded a year earlier**, indicating some deterioration in crop condition compared with 2025.

Peanut Prices & Farmer Marketing:

The average price for all peanuts increased to **$0.233/lb for the week ending August 1**, compared with $0.216/lb the previous week. Runner prices also strengthened to **$0.233/lb**, from $0.213/lb.

Farmer marketing totaled **68.57 million lb** during the week, down from **98.91 million lb** the previous week and 117.10 million lb during the week ending July 4. The decline suggests a slower pace of farmer selling despite the recent improvement in prices.

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 9, 2025	Week ending August 2, 2026	Week ending August 9, 2026	2021-2025 Average
	(percent)	(percent)	(percent)	(percent)
Alabama	91	89	93	92
Florida	100	95	98	98
Georgia	98	94	97	98
North Carolina	97	98	100	96
Oklahoma	73	67	82	71
South Carolina	96	97	99	96
Texas	76	68	74	73
Virginia	92	95	97	95
8 States	94	90	94	93

Peanut Condition

Peanut Condition – Selected States: Week Ending August 9, 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	18	62	13
Florida	-	1	17	82	-
Georgia	1	7	32	53	7
North Carolina	1	1	14	52	32
Oklahoma	1	5	32	60	2
South Carolina	5	8	28	55	4
Texas	1	5	43	49	2
Virginia	-	-	29	71	-
8 States	1	6	29	56	8
Previous week	1	6	29	55	9
Previous year	-	3	23	61	13

- Represents zero.

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

Peanut Prices and Marketings by Type – United States: July 4, 2026-August 1, 2026

Item and type	Week ending July 4, 2026	July 11, 2026	July 18, 2026	July 25, 2026	August 1, 2026
	(dollars per pound)	(dollars per pound)	(dollars per pound)	(dollars per pound)	(dollars per pound)
Average price					
Runner	0.229	0.223	0.208	0.213	0.233
Spanish	0.512	(X)	(X)	0.279	0.228
Valencia	(X)	(X)	(X)	(X)	(X)
Virginia	0.259	0.285	0.267	0.293	0.218
All	0.242	0.233	0.235	0.216	0.233
	(1,000 pounds)	(1,000 pounds)	(1,000 pounds)	(1,000 pounds)	(1,000 pounds)
Marketings [1]					
Runner	83,505	81,097	44,913	95,258	67,486
Spanish	1,935	-	-	1,649	302
Valencia	-	-	-	-	-
Virginia	31,656	16,421	37,135	2,006	783
All	117,096	97,518	82,048	98,913	68,571

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

Source: USDA

INDIA

- **Rajasthan:** Groundnut acreage is higher than last year, with production expected to increase. The crop estimate will become clearer after next month. NAFED holds around **70,000 MT** of unsold stocks, while government sales continue at around **₹7,000/quintal**. Peanut prices are currently around **₹103–104/kg**.
- **Gujarat:** Groundnut acreage and production are estimated **15–20% lower YoY**, particularly in key G-20 and Java-growing areas. Quality peanut availability is tight. Old 80/90-count prices increased from **₹108–109/kg to ₹113–114/kg**, while bold peanuts recovered from **₹100–101/kg to ₹104–105/kg** following Indonesia export developments.
- **Indonesia Demand:** Indonesia has announced peanut import quotas, but final allocations may take around **15 days**. Further export activity will depend on the final quota and Indian government regulations.
- **Uttar Pradesh:** Groundnut acreage is expected to increase by **at least 25% YoY**, supported by a shift in acreage from paddy. Current arrivals remain low, with prices around **₹6,500–6,700/quintal for edible quality** and **₹5,800–6,200/quintal for crushing quality**.
- **Price Outlook:** Strong farmer price expectations, limited quality availability and potential Indonesian demand are providing support. However, weak current trading activity and upcoming holidays are likely to keep the market **range bound in the near term**.

STATISTICS

Year wise Exports of Argentina (Quantity) (MT)

Country	2020	2021	2022	2023	2024	2025
Netherlands	282070	238918	266410	232595	224335	268731
U K	69041	51009	45527	42279	47650	52916
Poland	39921	47014	45265	41975	37568	49410
Russia	24773	39698	21281	16466	36442	17997
Italy	18850	19515	21779	19419	20308	22365
Germany	24206	19949	19722	15600	20368	22214
France	15636	15606	18521	15507	22706	25317
Spain	11804	16858	17798	17120	20744	21727
China	11896	4327	10562	8427	0	69747
Australia	22851	16861	14607	12537	17170	18995
Others	128606	123359	111788	132537	98298	108597
Total	649654	593113	593261	554462	545590	678016

Year on Year Comparison of Exports - Argentina

Destination	2024 (MT)	2025 (MT)	Change (MT)	% Change
Netherlands	2,24,335	2,68,731	44,396	19.80%
China	0	69,747	-	-
UK	47,650	52,916	5,266	11.10%
Poland	37,568	49,410	11,842	31.50%
France	22,706	25,317	2,611	11.50%
Italy	20,308	22,365	2,057	10.10%
Germany	20,368	22,214	1,846	9.10%
Spain	20,744	21,727	983	4.70%
Australia	17,170	18,995	1,825	10.60%
Russia	36,442	17,997	-18,445	-50.60%
Others	98,049	1,08,154	10,105	10.30%
Total	5,45,340	6,77,573	1,32,233	24.20%

Jan to June 2026 of Exports - Argentina

	January		February		March		April		May		June	
Country	Qty (MT)	USD/MT	Qty (MT)	USD/MT	Qty (MT)	USD/MT	Qty (MT)	USD/MT	Qty (MT)	USD/MT	Qty (MT)	USD/MT
Netherlands	22332	1191	20194	1191	27490	1157	20524	1127	19957	1139	17049	1122
China	10491	734	9477	718	9102	680	9697	681	11559	712	8167	709
U K	4472	1123	4559	1072	8247	972	5468	1026	6453	982	5647	994
Poland	4151	1160	3800	1113	5888	1109	4189	1135	5699	1131	4094	1109
France	1672	1353	2055	1410	3053	1281	2395	1054	2428	1337	2119	1287
Germany	1482	1050	1066	888	2266	937	2989	1048	2615	903	1502	903
Spain	2098	1354	1730	1319	2026	1275	1874	1296	1253	1216	1827	1309
Italy	2751	1306	1967	1332	1328	1354	1725	1275	1748	1315	1276	1316
Russia	1475	1246	1424	1203	2231	1163	1777	1274	2001	1123	1227	1116
Greece	1342	1220	1323	1290	967	1226	1084	1252	1279	1238	838	1313
Others	9130		6258		13210		8772		8330		10516	

Total	**61396**		**53852**		**75807**		**60494**		**63321**		**54262**	

Jan to June 2025 Exports -Argentina

Country	January	February	March	April	May	June
Netherlands	18904	29046	21099	15012	17960	16548
U K	4753	3440	4200	4274	5179	3152
Poland	2566	4905	3568	4005	3197	3046
France	1777	2237	1330	2205	2262	2560
Italy	1249	2743	923	1976	1481	2129
Australia	1481	1528	1733	2078	1184	1896
Russia	2590	3670	1406	366	416	1342
Germany	1000	1052	2069	1821	2054	1527
Spain	1406	1922	1695	1797	1099	849
China	0	0	0	0	2996	4070
Others	8082	8846	7473	6410	6370	6763
Total	**43807**	**59389**	**45496**	**39944**	**44196**	**43882**

June 2025 vs 2026 - Argentina

Country	2026 (MT)	2025 (MT)	Change (MT)	% Change
Netherlands	17,049	16,548	501	3.00%
China	8,167	4,070	4,097	100.70%
U K	5,647	3,152	2,495	79.20%
Poland	4,094	3,046	1,048	34.40%
France	2,119	2,560	-441	-17.20%
Germany	1,502	1,527	-25	-1.60%
Spain	1,827	849	978	115.20%
Italy	1,276	2,129	-853	-40.10%
Russia	1,227	1,342	-115	-8.60%
Others	11,354	6,763	4,591	55.50%
Total	54,262	43,882	10,380	23.70%

Indian Key Market Statistics

Groundnut — weekly rate table (05-Aug vs 12-Aug 2026)

Market	Origin	Variety	Count	05-Aug Min	05-Aug Max	12-Aug Min	12-Aug Max
Hyderabad	Telangana	Java	60/65	12,800	13,200	13,600	13,700
Hyderabad	Gujarat	Bold	50/60	—	—	13,500	14,000
Hyderabad	Gujarat	Java	80/90	12,300	12,300	—	—
Hyderabad	Banaskantha	TJ	50/60	12,600	12,600	12,500	12,500
Chennai/Mumbai	Telangana	Java	60/65	—	—	13,900	14,000
Chennai/AP	AP	Java	80/90	—	—	12,600	12,700
Keshod	Gujarat	Java	50/60	—	—	12,800	12,800
Keshod	Gujarat	Java	80/90	—	—	12,400	12,400
Keshod	Gujarat	Bold	38/42	11,300	11,300	11,300	11,300

FOREX (Against USD)

Currency	Aug 05, 2026	Aug 12, 2026	WoW %	Year to Date % Change
Argentine Peso (ARS)	1496.5	1,490.98	-0.37%	2.72%
Brazilian Real (BRL)	5.1284	5.1629	0.67%	-5.75%
Chinese Yuan (CNY)	6.75	6.7429	-0.11%	-3.59%
Indian Rupee (INR)	95.16	95.364	0.21%	6.00%
Mozambican Metical (MZN)	63.89	63.89	0.00%	0.42%
Nigerian Naira (NGN)	1362.98	1,362.20	-0.06%	-5.83%
Sudanese Pound (SDG)	600.2207	600.1707	-0.01%	0.02%
Tanzanian Shilling (TZS)	2647.5	2,650	0.09%	7.72%
Euro (EUR)	0.8667	0.8666	-0.01%	1.79%
West African CFA (XOF)	568.839	568.398	0.00%	0.00%
Turkish Lira (TRY)	47.5774	47.7578	0.00%	0.00%

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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