July 15th, 2026

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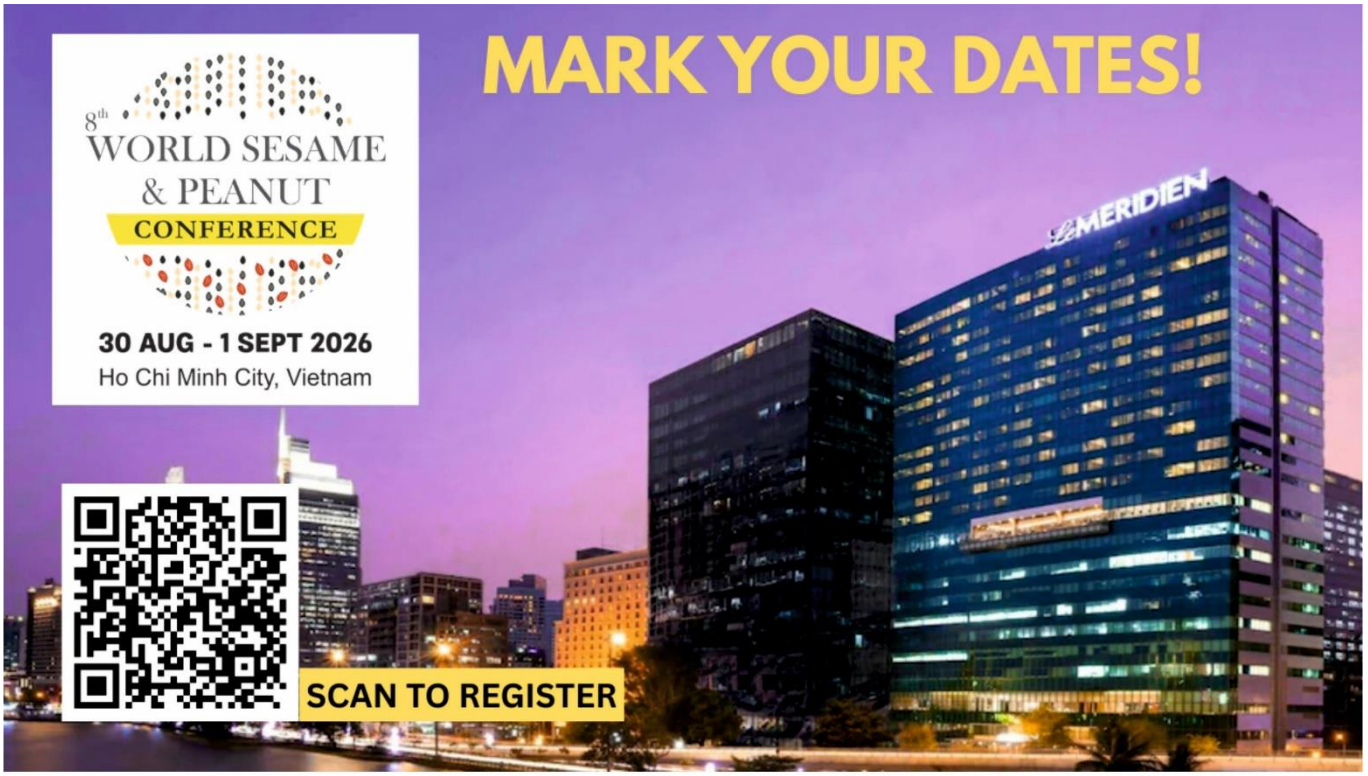
GLOBAL Peanut weekly

Market Insights

Volume - 03: Issue 28




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SUMMARY

USA: US peanut crop stable at 61% Good-to-Excellent, with prices up to $0.241/lb and marketings rising to 120.8M lbs.

China: China's peanut oil output rose 7.3% to 3.82M MT with stable prices, while Jan–Apr 2026 imports fell 16.6% as domestic self-sufficiency grew.

India: Indian peanut prices are firming on delayed monsoon rains threatening crops (Gujarat sowing down 25–30%, output risk of 30–50% decline), with NAFED raising prices to ₹6,800/quintal amid strong demand.

Argentina: Argentina's 2025/26 peanut area and output fell sharply (~917,000 MT vs 1.3M+ MT last season) on lower planting and rain-delayed harvest, while exports hit a record $1.2B, led by the EU.

Indonesia: Indonesia's peanut imports averaged ~310k MT/year (2021-2025), but China has now overtaken India as top 2026 supplier (73.6% vs 23.8% share).

Thailand: Peanut imports stayed stable (~279,263 MT cumulative, 2021-2025), with India leading (59.4%) and China second (33.6%), but China now dominates Jan–Mar 2026 imports (74.3% share).

Malaysia: Imports swung sharply up 28.3% in 2022, down 51.9% in 2023 as China took the lead (52.3% share by 2024), then recovered 17.2% in 2025 with India regaining top spot.

CHINA

Peanut Oil

China's peanut oil industry continues to transition toward health-oriented and premium edible oil consumption, supported by rising consumer preference for nutritious and high-quality cooking oils. Peanut oil remains one of the country's key edible oils due to its distinctive flavor, nutritional value, and strong household demand.

Production

- China's peanut oil production reached 3.82 million MT during October 2024–September 2025, representing a 7.3% year-on-year increase.
- Higher production was driven by improved domestic peanut availability and increased raw peanut imports, ensuring adequate supplies for crushers.
- The average ex-factory price remained stable at RMB 15,325/MT, indicating balanced supply-demand conditions despite higher output.

Trade Performance (Jan–Apr 2026)

- Imports of peanut oil and its derivatives declined to 95,000 MT, down 16.6% YoY.
- Import value fell 19.5% YoY to US$141 million, reflecting both lower import volumes and softer international prices.
- The decline in imports highlights China's growing self-sufficiency in raw peanuts and domestic peanut oil production, reducing reliance on overseas supplies.
- Exports increased modestly during the same period, with shipments reaching 3,900 MT, up 4.5% YoY.
- Export value rose 9.6% YoY to US$8.03 million, suggesting improved export prices and demand in selected overseas markets.

Market Analysis

- Rising domestic peanut production has strengthened the availability of raw materials for crushers, supporting higher peanut oil production.
- Stable ex-factory prices indicate that increased output has been largely absorbed by domestic consumption.
- Lower imports, coupled with higher domestic production, reinforce China's position as a **largely self-sufficient peanut oil market**.
- Although exports remain relatively small compared to domestic production, their steady growth reflects improving competitiveness in niche international markets.

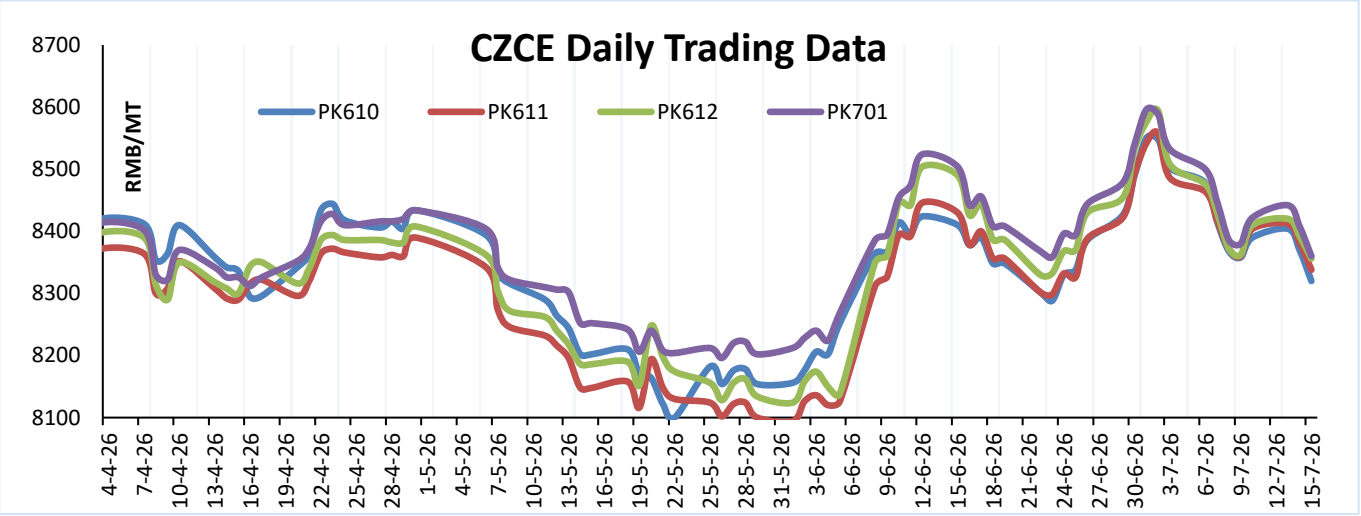
Zhengzhou Commodity Exchange Data

CZCE Daily Trading Data (15-07-2026)											
Contract Month	Prev. Settle	Open	High	Low	Close	Settlement	Change	Volume	Open Interest	OI Change	Turnover
PK610	8,370	8,382	8,386	8,278	8,282	8,320	-50	1,00,458	1,68,046	-14,799	4,17,923
PK611	8,382	8,386	8,392	8,288	8,298	8,338	-44	1,19,920	1,67,710	-5,669	4,99,956
PK612	8,392	8,382	8,408	8,306	8,308	8,356	-36	60,223	49,243	789	2,51,594
PK701	8,408	8,404	8,420	8,322	8,324	8,360	-48	1,774	5,827	-200	7,415
Total								2,82,375	3,90,826	-19,879	11,76,887

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	8th July	15th July	% Change
Oct	8,368	8,320	-0.57%
Nov	8,372	8,338	-0.41%
Dec	8,372	8,356	-0.19%
Jan	8,386	8,360	-0.31%

Year-on-Year

Contract	15th July 25	15th July 26	% Change
Oct	8,182	8,320	1.69%
Nov	8,030	8,338	3.84%
Dec	7,990	8,356	4.58%
Jan	7,996	8,360	4.55%

(Source: Zhengzhou Commodity Exchange)

INDIA

Peanut prices remained firm to higher amid delayed monsoon rains and concerns over crop development. Strong domestic demand and active procurement of government stocks continued to support the market.

Crop & Production

- Uttar Pradesh has completed nearly 100% of normal peanut sowing, but inadequate rainfall is causing crop stress in rainfed areas.
- Gujarat peanut sowing is estimated to be 25–30% lower than last year due to delayed monsoon.
- Industry estimates suggest production could decline by 30–50% if rainfall does not improve in the coming weeks.

Market & Prices

- NAFED increased its peanut selling price from around ₹6,600 to ₹6,800/quintal.
- Government agencies are estimated to hold 600,000–750,000 MT of peanut stocks.
- Summer peanut prices are quoted between ₹7,000–8,400/quintal, depending on quality.
- Market participants expect peanut prices to increase by another ₹2–4/kg if dry weather persists.

Demand & Trade

- Strong buying interest from roasters, peanut butter manufacturers, and crushers is supporting prices.
- Stockists continue purchasing NAFED stocks amid expectations of tighter new-crop supplies.
- Indonesia remains closed to direct Indian peanut imports, limiting export demand. However, traders expect prices could rise by ₹8–10/kg if the market reopens.

USA

- Peanut crop conditions remained generally stable during the week ending July 12, 2026, with 61% of the crop rated Good to Excellent (53% Good, 8% Excellent).
- Poor to Very Poor ratings increased slightly to 8%, while 31% of the crop was rated Fair.
- North Carolina (26% Excellent) and Virginia (69% Good) continue to report the strongest crop conditions, while Georgia, Oklahoma, and Texas are experiencing higher levels of crop stress.
- The U.S. average peanut price increased to US$0.241/lb during the week ending July 4, compared with US$0.212/lb in the previous week.
- Spanish peanuts recorded the highest price at US$0.512/lb, followed by Virginia peanuts (US$0.259/lb) and Runner peanuts (US$0.229/lb).
- Total peanut marketings increased to 120.8 million lbs, reflecting stronger farmer selling activity.

Peanut Conditions – United States

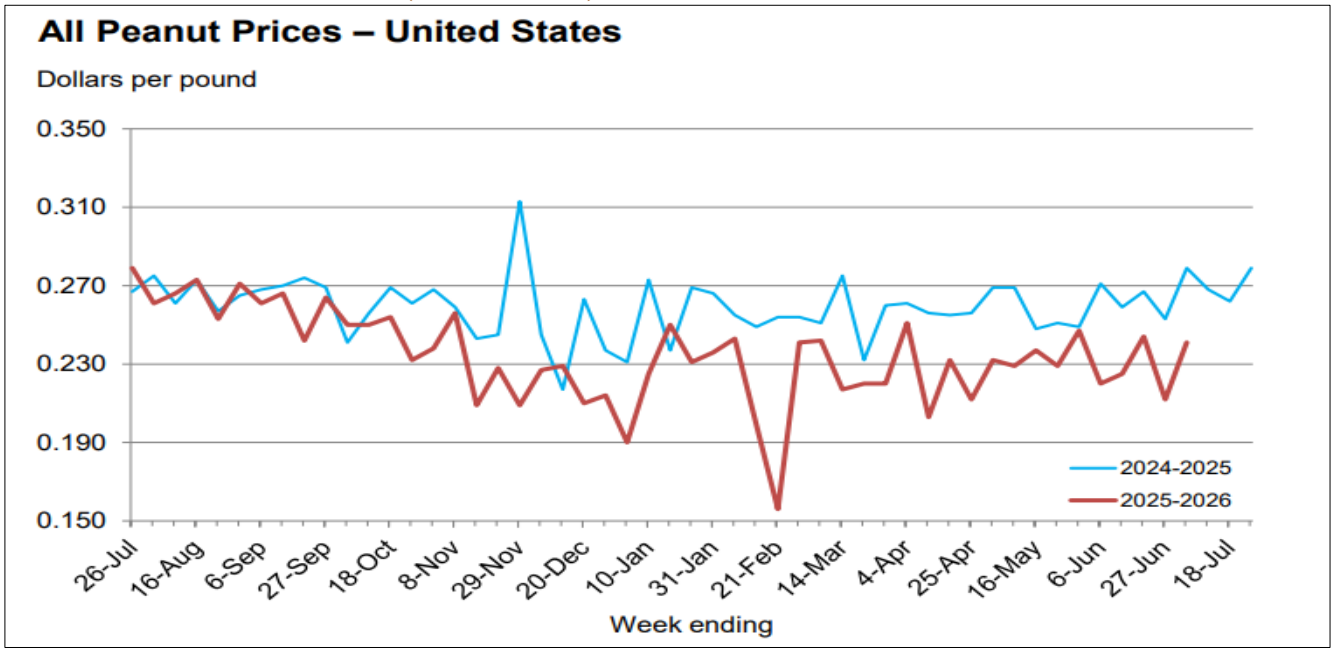
Peanut Condition – Selected States: Week Ending July 5, 2026

[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: June 6, 2026-July 4, 2026

Item and type	Week ending June 6, 2026	June 13, 2026	June 20, 2026	June 27, 2026	July 4, 2026
	(dollars per pound)	(dollars per pound)	(dollars per pound)	(dollars per pound)	(dollars per pound)
Average price					
Runner	0.215	0.225	0.238	0.212	0.229
Spanish	0.332	(X)	0.291	(X)	0.512
Valencia	(X)	(X)	(X)	(X)	(X)
Virginia	0.286	(X)	0.251	(X)	0.259
All	0.220	0.225	0.244	0.212	0.241
	(1,000 pounds)	(1,000 pounds)	(1,000 pounds)	(1,000 pounds)	(1,000 pounds)
Marketings [1]					
Runner	79,859	87,167	55,749	82,514	87,220
Spanish	2,206	-	4,092	-	1,935
Valencia	-	-	-	-	-
Virginia	1,764	-	22,986	-	31,656
All	83,829	87,167	82,827	82,514	120,811

- 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 12, 2025	July 5, 2026	July 12, 2026	2021-2025 Average
	(percent)	(percent)	(percent)	(percent)
Alabama	62	46	60	59
Florida	81	55	78	76
Georgia	79	62	76	76
North Carolina	64	47	66	60
Oklahoma	23	13	27	27
South Carolina	71	61	76	75
Texas	24	16	20	20
Virginia	47	43	61	56
8 States	68	51	65	65

Peanut Condition

Peanut Condition – Selected States: Week Ending July 12, 2026

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

State	Very poor	Poor	Fair	Good	Excellent
	(percent)	(percent)	(percent)	(percent)	(percent)
Alabama	-	6	20	69	5
Florida	-	4	28	68	-
Georgia	-	10	34	47	9
North Carolina	1	4	25	44	26
Oklahoma	3	13	31	50	3
South Carolina	2	9	28	56	5
Texas	8	1	39	50	2
Virginia	-	3	28	69	-
8 States	1	7	31	53	8
Previous week	1	6	34	54	5
Previous year	-	5	25	59	11

- Represents zero.

Source: USDA

ASEAN

Indonesia

Import Trend

- Indonesia's peanut imports remained consistently strong during 2021–2025, averaging around 310,000 MT annually, reflecting stable demand.
- Total imports increased from 287,095 MT in 2021 to a peak of 343,855 MT in 2024, before moderating to 299,397 MT in 2025.
- During January–April 2026, Indonesia imported 167,543 MT, representing around 56% of the total imports recorded in 2025, indicating another active import year.

Supplier Trend

- India remained Indonesia's dominant peanut supplier during 2021–2025, exporting a cumulative 1.24 million MT, accounting for the largest market share with an average export price of USD1,179/MT.
- China strengthened its presence significantly, with exports increasing from 29,945 MT in 2021 to 78,615 MT in 2025, supported by competitive pricing and improved availability.
- Mozambique, Sudan, Tanzania, and Malaysia remained secondary suppliers, serving niche demand and supplying comparatively smaller volumes.

2026 YTD (Jan–Apr)

- China emerged as the leading supplier, exporting 123,308 MT and accounting for 73.6% of Indonesia's total peanut imports.
- India ranked second, supplying 39,801 MT (23.8%), a significant decline in market share compared to previous years.
- Malaysia, Brazil, Nigeria, and the United States supplied only limited quantities.

Malaysia

Import Trend Analysis (2021–2025)

- Imports increased strongly in 2022, reaching 53,319 MT, up 28.3% YoY from 41,552 MT in 2021, driven primarily by higher purchases from India, which supplied 40,443 MT and accounted for 75.8% of total imports.
- Imports declined sharply in 2023 to 25,644 MT (-51.9% YoY), reflecting weaker demand and/or increased domestic availability. During this period, China became the leading supplier, providing 11,514 MT and capturing 44.9% of total imports.
- Import volumes remained relatively stable in 2024, easing slightly by 5.0% YoY to 24,372 MT. China strengthened its position as the largest supplier, increasing its market share to 52.3% with 12,758 MT.
- Imports recovered in 2025, rising 17.2% YoY to 28,574 MT. India regained its position as the leading supplier, exporting 13,513 MT and accounting for 47.3% of total imports, indicating renewed competitiveness in the market.

Thailand

Import Market Analysis (2021 to January–March 2026)

- Thailand's peanut import market has remained stable over the past five years, with annual imports averaging around 55,000–56,000 MT. Between 2021 and 2025, the country imported a cumulative 279,263 MT, reflecting consistent demand from the food processing, snack, and confectionery industries.
- India has been Thailand's dominant supplier, accounting for 165,792 MT (59.4%) of total imports during 2021–2025. Although Indian shipments declined in 2022, exports recovered strongly over the following three years, reaching 26,871 MT in 2025, the highest level during the period. This highlights India's continued competitiveness in terms of supply reliability and product availability.
- China remained the second-largest supplier, contributing 93,853 MT (33.6%) over the five-year period. Chinese exports gradually declined from 2021 to 2024 before rebounding sharply in 2025, indicating renewed competitiveness and stronger market participation.
- In contrast, Myanmar's market presence weakened significantly, with exports falling from 5,849 MT in 2021 to virtually zero by 2025. Argentina and other origins accounted for only marginal volumes throughout the period.
- During January–March 2026, Thailand imported 12,335 MT of peanuts at an average import price of US$1,232/MT. China emerged as the leading supplier, accounting for 9,164 MT (74.3%) of total imports, while Malaysia supplied 3,109 MT (25.2%) at a considerably lower average price of US$537/MT. Argentina supplied only 63 MT, representing a negligible share.

ARGENTINA

Argentina Peanut Crop & Market Outlook

Crop & Production

- Argentina's 2025/26 peanut planted area declined to 384,000 hectares, significantly lower than the record area of the previous season due to restructuring by major peanut companies.
- Current production is forecast at around 917,000 MT (kernel basis), compared with more than 1.3 million MT last season, reflecting both lower acreage and reduced yields.

- Initial yield estimates stood at 2.42 MT/ha (kernel), but industry participants expect this figure to be revised downward as harvest progresses.

Harvest Progress

- Harvest is 65–70% complete, lagging behind the normal schedule due to persistent rainfall and excessive soil moisture during April and May.
- Heavy rains delayed field operations, while frost in southern production areas caused localized quality concerns and smaller kernel sizes.
- Despite weather challenges, aflatoxin contamination remains minimal, maintaining Argentina's reputation as a reliable supplier for premium export markets.

Exports & Trade

- Argentina recorded a historic peanut export value exceeding US$1.2 billion last year across shelled peanuts, value-added products, peanut oil, and expeller.
- Export prices have stabilized in recent months, with upward price potential expected due to reduced crop availability in the current season.
- The European Union continues to dominate Argentina's export portfolio, accounting for more than 65% of kernel exports, while total Europe (including the UK) represents nearly 75% of shipments.
- China remained a notable buyer during the previous marketing year, importing significant volumes of Argentine peanut kernels in addition to its traditional purchases of peanut oil.

Insights from **Mr Edoardo Fracanzani, Executive Director**, Argentina Peanut Chamber

STATISTICS

ASEAN

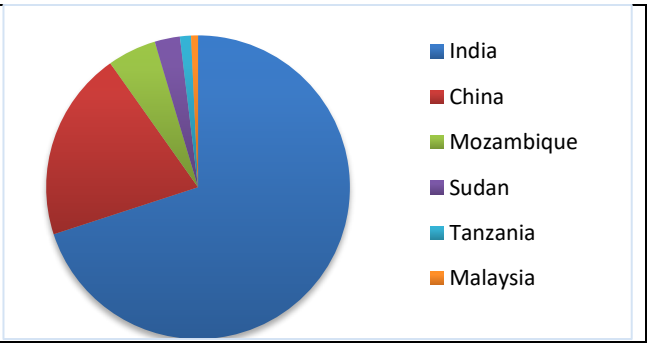
Annual Import Volumes (MT)

Country	2021	2022	2023	2024	2025
Vietnam	88534	94203	128888	197646	199643
Indonesia	287095	332695	289136	343855	299397
Malaysia	41552	53319	25644	24372	28574
Thailand	36259	26114	31517	28869	39339

Indonesia

Top Suppliers Cumulative (2021–Apr 2026)

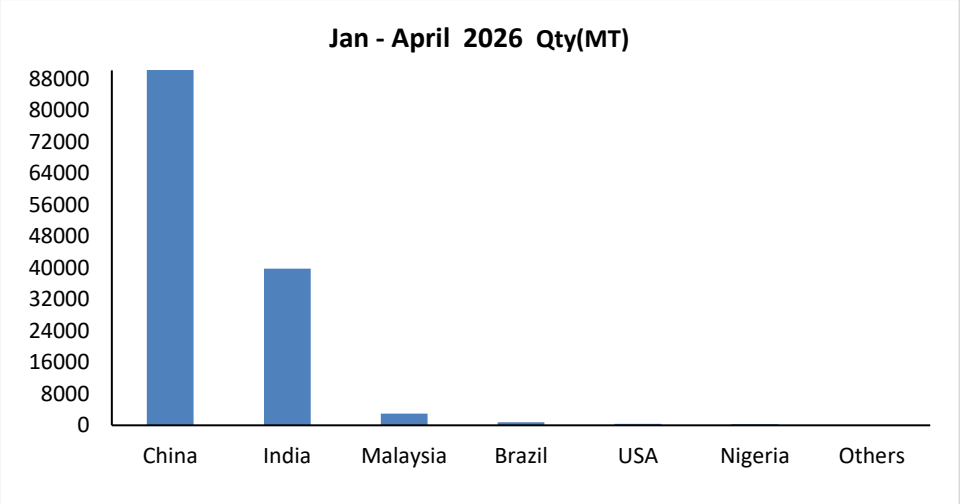
Country	Quantity (MT)
India	12,42,956
China	3,58,988
Mozambique	92,513
Sudan	47,635
Tanzania	20,910
Malaysia	13,146



Year wise Imports 2021 to 2025

Country	2021		2022		2023		2024		2025	
	Quantity	USD/MT	Quantity	USD/MT	Quantity	USD/MT	Quantity	USD/MT	Quantity	USD/MT
India	239171	1211	258243	1257	207781	1251	277375	1127	220584	972
China	29945	1566	41681	1472	36804	1595	48635	1394	78615	1307
Sudan	12862	1233	30460	1120	990	0	3125	134	198	875
Malaysia	407	900	1418	1102	0	0	0	0	0	0
Togo	1823	1088	893	1091	485	0	0	0	0	0
Indonesia	10	800	0	0	0	0	0	0	0	0
Others	2877		0		43077		14719		0	
Total	2,87,095		3,32,695		2,89,136		3,43,855		2,99,397	

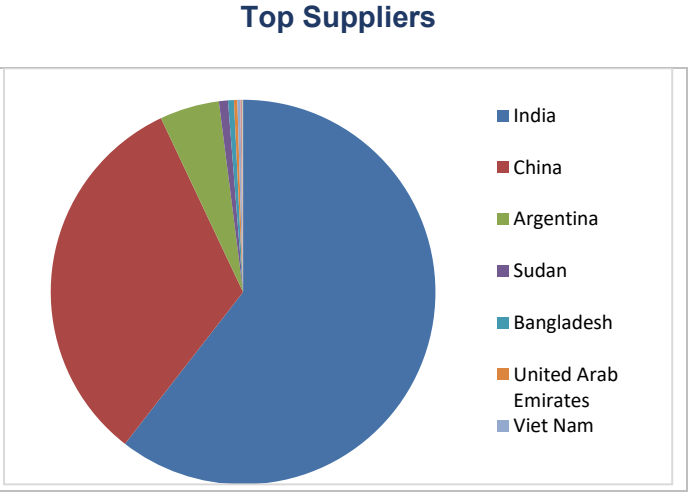
Imports Jan to April 2026



Malaysia

Top Suppliers (2021–2025)

Country	Quantity (MT)
India	1,04,988
China	56,293
Argentina	8,688
Sudan	1,315
Bangladesh	858
UAE	495
Viet Nam	425
Others	401
Grand Total	1,73,462



Year wise Imports 2021 to 2025

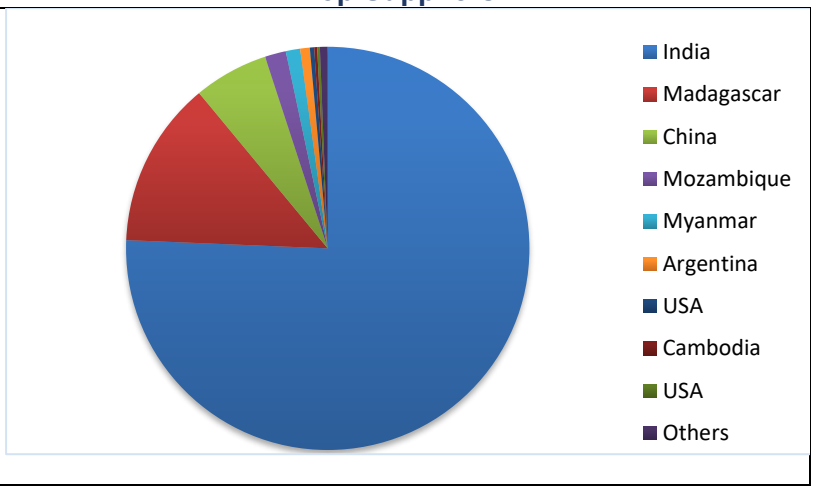
Country	2021	2022	2023	2024	2025
India	29772	40442.6	10517.5	10742.9	13512.6
China	8409.52	10250.7	11513.5	12757.6	13359.4
Argentina	2858.94	2207.41	2547.28	449.48	624.9
Sudan	176.342	0	120	414.45	604.293
Bangladesh	152	160	340.68	0	205

U A E	0	95	400.4	0	0
Viet Nam	140	160	107.4	0.238	17.15
Australia	0	3.58	5	7.65	250.22
Mozambique	0	0	91.8	0	0
Brazil	41.9	0	0.488	0	0
Grand Total	41551.7	53319.4	25644.1	24372.4	28574.3

Vietnam

Top Suppliers

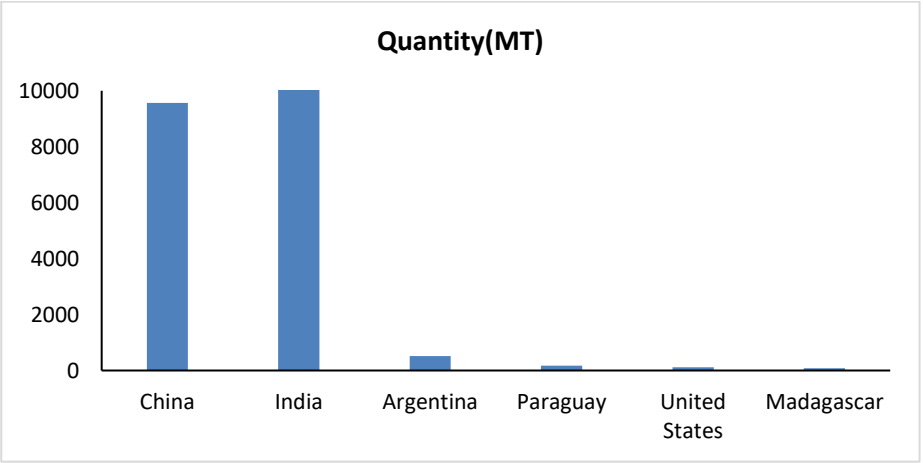
Country	Qty (MT)
India	536325
Madagascar	94547
China	42431
Mozambique	11920
Myanmar	8142
Argentina	5485
Usa	2435
Cambodia	1663
USA	1541
Others	4425
Grand Total	708913



Year wise Imports 2021 to 2025

Country	2021	2022	2023	2024	2025
India	81859.65	89727.38	125904.4	102599	136234.5
Argentina	1009.49	824.9159	1002.937	1118.2	1529.559
China	1418.692	430.81	879.0858	13510.12	26192.54
Myanmar	3408.846	2875.295	556.3764	861.8598	440
USA	721.8338	293.547	525.5801	0	0
Indonesia	7.619184	46.02432	19.4077	0	0
Mozambique	0	0	0	11920.2	0
Madagascar	0	0	0	61449.33	33097.18
Others	107.7199	4.76048	0	6187.267	2149.249
Grand Total	88533.85	94202.74	128887.8	197646	199643.1

Imports Jan to Mar 2026

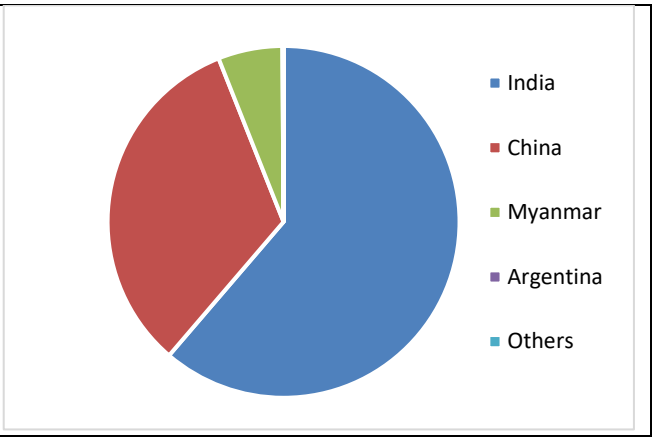


Thailand

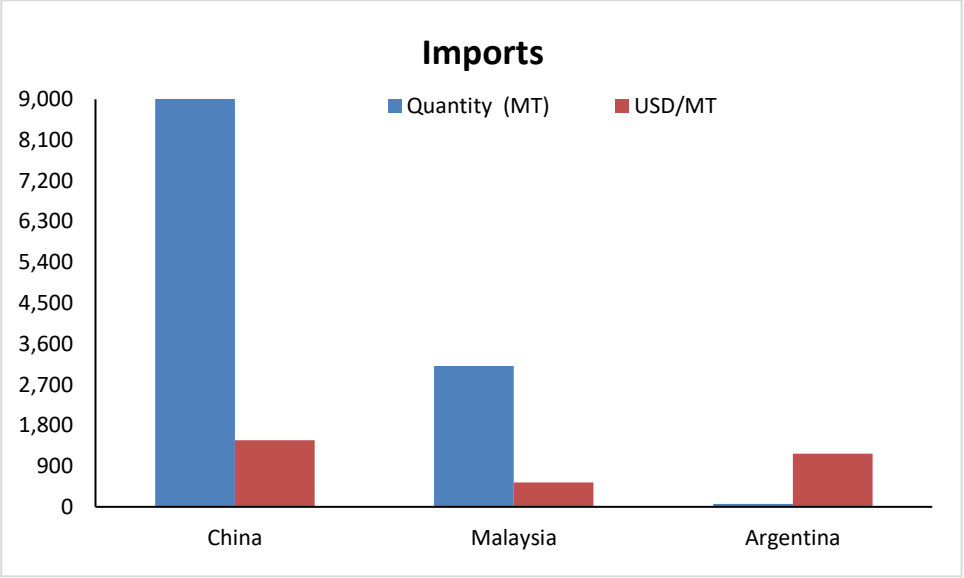
Top Suppliers (2021 to 2025)

2021-2025	
Country	**Quantity (MT)**
India	165792
China	93853
Myanmar	19196
Argentina	397
Others	24
Grand Total	2,79,263

Top Suppliers



Imports Jan to March 2026



Indian Key Market Statistics

Groundnut Seed Rate

Market	Origin	Variety	Count	08-Jul Min	08-Jul Max	15-Jul Min	15-Jul Max	WoW Change	WoW % Change
Hyderabad	Telangana	Java	60/65	13,800	14,300	13,500	13,500	**-800**	**-5.59%**
Chennai/AP	AP	Java	80/90	12,700	12,700	13,100	13,200	**450**	**+3.54%**
Keshod	Gujarat	Java	50/60	11,600	11,600	11,800	11,800	**200**	**1.72%**
	Gujarat	Java	80/90	12,500	12,500	12,600	12,600	**100**	**0.80%**
	Gujarat	Bold	40/50	10,750	10,750	10,900	10,900	**150**	**1.40%**
	Gujarat	Bold	38/42	11,300	11,300	11,300	11,300	**0**	**0.00%**

FOREX (Against USD)

Currency	July 8, 2026	July 15, 2026	WoW %	Year to Date % Change
Argentine Peso (ARS)	1,492.01	1,470.47	-1.44%	1.31%
Brazilian Real (BRL)	5.1587	5.0721	-1.68%	-7.41%
Chinese Yuan (CNY)	6.7967	6.775	-0.32%	-3.13%
Indian Rupee (INR)	95.623	96.517	0.93%	7.28%
Mozambican Metical (MZN)	63.89	63.89	0.00%	0.42%
Nigerian Naira (NGN)	1375.48	1,380.66	0.38%	-4.55%
Sudanese Pound (SDG)	600.2207	600.1707	-0.01%	0.02%
Tanzanian Shilling (TZS)	2623.85	2,635.00	0.42%	7.11%
Euro (EUR)	0.8761	0.876	-0.01%	2.89%
West African CFA (XOF)	574.995	574.516	-0.08%	2.78%
Turkish Lira (TRY)	46.8573	47.0315	0.37%	9.29%

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.*

Contact us: Analyst - Shravanthi to provide feedback & suggestions, write to peanutinfo@eventellglobal.com or contact at +91 9513333926.

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