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Eventell Global Advisory Pvt Ltd

Global PEANUT Weekly

Market Insights

Volume - 03: Issue 33




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SUMMARY

USA: Lower acreage and production forecasts support prices, but increased marketings (Quantity Purchased from farmers) are limiting gains.

China: Stable prices, but better new-crop prospects and weak demand may limit upside.

India: Good crops in UP/MP/Rajasthan offset Gujarat's weather risks, keeping prices range-bound amid weak Indonesia demand.

Europe: Demand remains weak, with buyers being price-sensitive and Brazilian supplies facing aflatoxin concerns.

Indonesia: Import restrictions keep the market firm, with prices rising and further upside possible on stronger seasonal demand.

CHINA

Futures Market:

- The PK2610 peanut futures contract closed at CNY 8,194/MT, down CNY 36/MT (-0.44%) from the previous session.
- The average spot price was CNY 8,296/MT, up CNY 400/MT (+5.07%).
- The PK10 spot basis stood at -CNY 1,594/MT, narrowing by 2.21%.

Domestic Market:

- The national average price of peanut kernels was around CNY 7,896/MT, broadly stable.
- Henan: New-crop spring white kernels were quoted at CNY 4.50–4.70/jin, while 8-sieve selected kernels were CNY 5.10–5.35/jin.
- Jiangxi: New-crop spring white kernels were CNY 4.70–4.85/jin, with 7-sieve selected kernels at CNY 5.30–5.40/jin, depending on moisture.
- Liaoning & Jilin: Cold-stored white kernels were around CNY 3.90–4.00/jin, while 8-sieve selected kernels were CNY 4.25–4.35/jin. Huayu 23 kernels were around CNY 4.00–4.05/jin, depending on quality.

Oilseed Market:

- The national average purchase price for oil-grade kernels at crushing plants was CNY 7,454/MT, unchanged.
- Shandong: Average oil-grade kernel prices were around CNY 7,394/MT.
- Oil mills nationwide were quoting approximately CNY 7,000–7,700/MT, depending on quality.

Market Trend:

- The PK2611 contract opened higher but closed lower, reflecting cautious market sentiment.
- New-crop peanut arrivals have not yet increased significantly, while high-quality old-crop peanuts in cold storage remain relatively firm due to limited availability.

- Downstream demand for pre-holiday stock replenishment remains lukewarm, keeping overall trading activity moderate.
- Improved weather conditions in major producing areas, particularly Henan and Hubei, have strengthened expectations for a favorable new-crop harvest.

Prices

Week-on-Week (2026)				Year-on-Year			
Month	12th Aug	19th Aug	% Change	Month	19th Aug 25	19th Aug 26	% Change
Oct	8200	8,146	-0.66%	Oct	8,036	8,146	1.37%
Nov	8200	8,148	-0.63%	Nov	7,818	8,148	4.22%
Dec	8206	8,156	-0.61%	Dec	7,848	8,156	3.92%
Jan	8218	8,178	-0.49%	Jan	7,912	8,178	3.36%

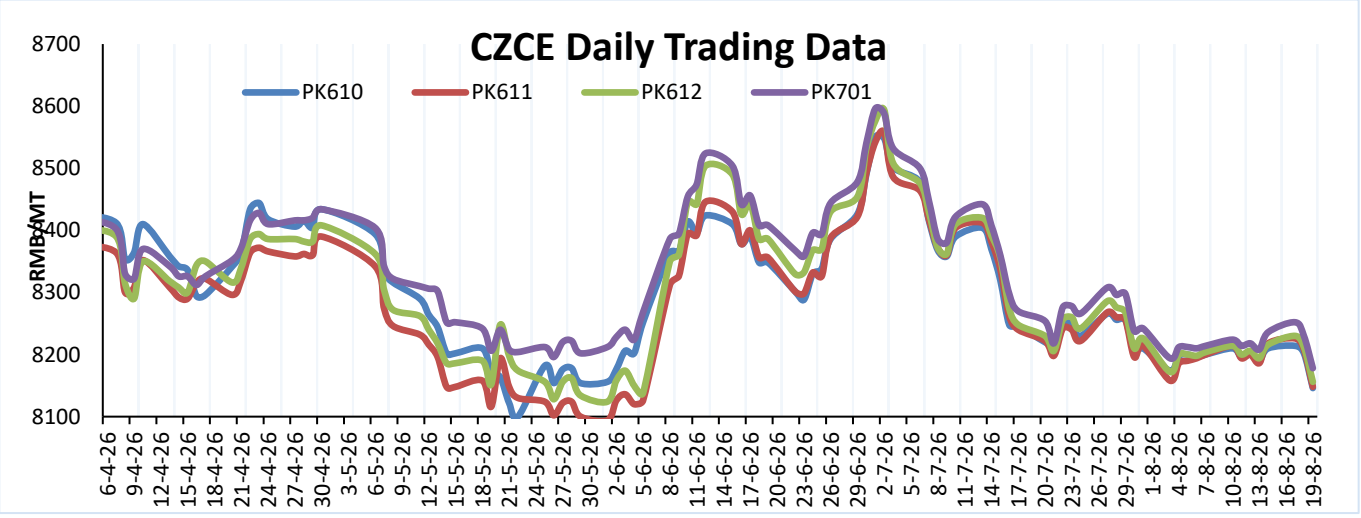
Zhengzhou Commodity Exchange Data

CZCE Daily Trading Data (19-08-2026)											
Contract Month	Prev. Settle	Open	High	Low	Close	Settlement	Change2	Volume	Open Interest	OI Change	Turnover
PK610	8,202	8,174	8,182	8,130	8,144	8,146	-56	21,626	66,145	-2,077	88,085
PK611	8,208	8,182	8,190	8,118	8,154	8,148	-60	1,96,047	2,24,692	15,570	7,98,578
PK612	8,212	8,184	8,194	8,128	8,168	8,156	-56	70,938	57,459	-1,576	2,89,301
PK701	8,230	8,228	8,228	8,148	8,190	8,178	-52	2,395	5,204	394	9,794
Total								2,91,006	3,53,500	3,078	11,85,758

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)

EUROPE

Demand across the EU, including the bird feed segment, has yet to fully align with current market fundamentals. Bird feed buyers remain focused on price levels of **USD 850–950/MT**, depending on grade, with sourcing primarily concentrated on **Argentina and Brazil**. However, Brazilian supplies continue to face some aflatoxin-related quality concerns.

Demand from the human consumption segment for both raw and blanched peanuts also remain subdued.

Buying interest is generally around **USD 1,450–1,550/MT for jumbo raw kernels** and approximately **USD 1,650/MT for blanched kernels**.

INDONESIA

Indonesia remains closed to peanut imports from all origins, with the import quota framework yet to be announced. Although the Ministry of Agriculture and Ministry of Commerce have collected documentation from importers and other interested parties, further clarity on quota allocation and the application process is unlikely before the end of September.

In the meantime, the market remains entirely dependent on domestic supplies. Local FAQ peanut prices have risen sharply from around USD 1,880/MT to approximately USD 2,320/MT, with market expectations that prices could potentially reach USD 2,770/MT if import restrictions remain in place.

While domestic stocks are still relatively ample and traders remain reluctant to release significant volumes, fresh-crop arrivals are gradually entering the market, providing some additional supply.

However, with seasonal demand expected to strengthen over the next two months, the Indonesian market is likely to remain firm, with continued upward pressure on prices unless import restrictions are eased.

USA

Peanut acreage and production: Total planted area is now forecast at 1.43 million acres, down 7% from the previous estimate and 27% below 2025. Harvested area is projected at 1.37 million acres, also down 7% from the previous forecast and 28% year-on-year.

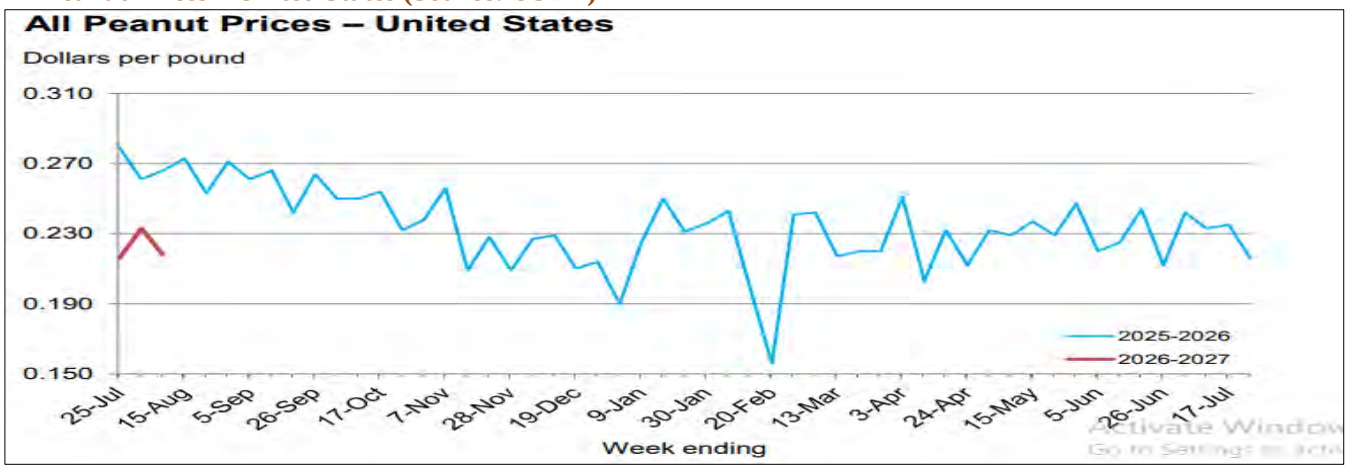
U.S. peanut production is forecast at 5.42 billion pounds, representing a 25% decline from 2025. Based on crop conditions as of August 1, the national average yield is estimated at 3,956 pounds per acre, up 189 pounds per acre from last year.

As of August 2, approximately 90% of the U.S. peanut crop had reached the pegging stage, 1 percentage point behind last year but in line with the five-year average. Crop conditions remained mixed, with 64% of the acreage rated good to excellent.

Farmer stock prices and marketings: For the week ending August 8, the average price received by farmers for all farmer-stock peanuts fell to 21.8 cents/lb, down 1.5 cents/lb from the previous week. Total marketings increased significantly to 122 million pounds, up 54.5 million pounds week-on-week.

For Runner-type peanuts, the average price declined to 21.3 cents/lb, down 2.0 cents/lb from the previous week, while marketings rose to 117 million pounds, an increase of 50.9 million pounds week-on-week.

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 16, 2025	Week ending August 9, 2026	Week ending August 16, 2026	2021-2025 Average
	(percent)	(percent)	(percent)	(percent)
Alabama	94	93	99	96
Florida	100	98	100	99
Georgia	100	97	100	99
North Carolina	98	100	100	98
Oklahoma	80	82	91	79
South Carolina	98	99	100	98
Texas	80	74	82	82
Virginia	95	97	98	97
8 States	96	94	97	97

Peanut Condition

Peanut Condition – Selected States: Week Ending August 16, 2026

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

State	Very poor	Poor	Fair	Good	Excellent
	(percent)	(percent)	(percent)	(percent)	(percent)
Alabama	1	7	21	62	9
Florida	2	3	20	74	1
Georgia	1	8	32	50	9
North Carolina	1	1	15	51	32
Oklahoma	3	7	23	65	2
South Carolina	-	10	31	54	5
Texas	1	7	42	48	2
Virginia	-	4	20	70	6
8 States	1	7	29	54	9
Previous week	1	6	29	56	8
Previous year	-	3	25	60	12

- Represents zero.

Peanut Area Planted and Harvested

Peanut Area Planted and Harvested – States and United States: 2025 and 2026

[Includes updates to planted and harvested area previously published]

State	Area planted 2025	Area planted 2026	Area harvested 2025	Area harvested 2026 [1]
	(1,000 acres)	(1,000 acres)	(1,000 acres)	(1,000 acres)
Alabama	195.0	145.0	192.0	142.0
Arkansas	48.0	40.0	47.0	39.0
Florida	175.0	135.0	167.0	127.0
Georgia	920.0	670.0	915.0	660.0
Mississippi	21.0	13.0	20.0	12.0
Missouri	27.0	25.0	26.0	24.0
North Carolina	140.0	130.0	139.0	129.0
Oklahoma	19.0	14.0	18.0	13.0
South Carolina	90.0	72.0	87.0	69.0
Texas	285.0	150.0	262.0	124.0
Virginia	33.0	31.0	33.0	31.0
United States	1,953.0	1,425.0	1,906.0	1,370.0

[1] Forecasted.

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

Peanut Prices and Marketings by Type – United States: July 11, 2026-August 8, 2026

Item and type	Week ending July 11, 2026	July 18, 2026	July 25, 2026	August 1, 2026	August 8, 2026
	(dollars per pound)	(dollars per pound)	(dollars per pound)	(dollars per pound)	(dollars per pound)
Average price					
Runner	0.223	0.208	0.213	0.233	0.213
Spanish	(X)	(X)	0.279	0.228	0.485
Valencia	(X)	(X)	(X)	(X)	(X)
Virginia	0.285	0.267	0.293	0.218	0.290
All	0.233	0.235	0.216	0.233	0.218
	(1,000 pounds)	(1,000 pounds)	(1,000 pounds)	(1,000 pounds)	(1,000 pounds)
Marketings [1]					
Runner	81,097	44,913	95,258	66,534	117,432
Spanish	-	-	1,649	302	1,316
Valencia	-	-	-	-	-
Virginia	16,421	37,135	2,006	783	3,404
All	97,518	82,048	98,913	67,619	122,152

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

Peanut Area Harvested, Yield, and Production – States and United States: 2025 and Forecasted August 1, 2026

Peanut Area Harvested, Yield, and Production – States and United States: 2025 and Forecasted August 1, 2026

State	Area harvested		Yield per acre		Production	
	2025	2026	2025	2026	2025	2026
	(1,000 acres)	(1,000 acres)	(pounds)	(pounds)	(1,000 pounds)	(1,000 pounds)
Alabama	192.0	142.0	3,400	3,200	652,800	454,400
Arkansas	47.0	39.0	5,000	4,800	235,000	187,200
Florida	167.0	127.0	3,900	3,800	651,300	482,600
Georgia	915.0	660.0	4,050	4,150	3,705,750	2,739,000
Mississippi	20.0	12.0	4,000	3,700	80,000	44,400
Missouri	26.0	24.0	5,200	5,000	135,200	120,000
North Carolina	139.0	129.0	3,900	4,300	542,100	554,700
Oklahoma	18.0	13.0	4,300	4,400	77,400	57,200
South Carolina	87.0	69.0	3,600	3,800	313,200	262,200
Texas	262.0	124.0	2,450	3,100	641,900	384,400
Virginia	33.0	31.0	4,400	4,300	145,200	133,300
United States	1,906.0	1,370.0	3,767	3,956	7,179,850	5,419,400

Source: USDA

INDIA

Crop:

- **Uttar Pradesh:** Crop conditions remain good, with **bumper production expected**. Timely rainfall has supported crop development. New arrivals in Jhansi are expected from **late September/early October**, increasing after Navratri.
- **Madhya Pradesh:** Crop conditions are favourable, with production potentially around **double last year's level**.
- **Rajasthan:** Production is expected to increase significantly, potentially by around **50% year-on-year**.
- **Gujarat:** Crop prospects remain a major concern due to insufficient rainfall, particularly in **Jamnagar, Dwarka, Porbandar and Kutch**. A **25–30% decline in production** is possible if rainfall remains inadequate, with losses potentially reaching 30–50% in severely affected areas.
- **G-20:** Production of the main Gujarat variety is expected to decline due to lower acreage and moisture stress.

Government Stocks:

- NAFED is expected to begin auctioning old groundnut stocks in **Uttar Pradesh from August 20**.
- Government stocks in UP are estimated at around **50,000 MT**, while total government-held stocks are estimated at more than **500,000 MT**.
- Good-quality stocks could command better prices, although continued government liquidation may limit the upside.

Export / Indonesia:

- Indonesian buying remains uncertain, with the **import quota framework still unclear**.
- Direct purchases have not fully resumed, while some trade is reportedly being routed through Malaysia.
- The earlier Indonesia-driven rally has weakened, with Gujarat prices falling from around **₹112/kg to ₹107/kg**.
- Further significant downside appears limited as stockists are reluctant to sell at current levels.

Price Outlook:

- **Near term:** Firm to range-bound.
- **Upside:** Lower Gujarat production, renewed Indonesian demand and slower selling could support prices.
- **Downside:** Larger crops in UP/MP/Rajasthan, government-stock auctions and weak export demand could limit gains.

BRAZIL

Brazilian peanut exports increased significantly in 2025, reaching 311,388 MT, up 37% from 226,800 MT in 2024.

The strongest growth came from China, with exports surging from just 612 MT to 61,603 MT, making China one of Brazil's key destinations.

Exports to Mexico also increased sharply, while volumes to Russia and the Netherlands remained relatively strong. Export prices, however, declined across most major destinations compared with 2024.

During January–June 2026, Brazil exported a total of approximately 154,591 MT, with monthly shipments increasing from 24,184 MT in January to 39,657 MT in June. The average export price also strengthened gradually, from USD 1,113/MT in January to USD 1,171/MT in June.

Russia remained the largest destination, with shipments reaching 39,657 MT during the first six months, followed by Algeria at 31,911 MT and South Africa at 14,371 MT. The Netherlands, Ukraine and Egypt were also significant buyers.

STATISTICS

Year wise Exports of Brazil (Quantity) (MT)

Country	2021	2022	2023	2024	2025
Russia	103585	98346	87902	61364	67648
Algeria	40650	39325	67478	40609	38259
Netherlands	21286	23748	27397	21126	24149
South Africa	11528	8676	17025	17900	18119
China	0.045	150	1377	612	61603
Ukraine	22250	8458	10594	10564	9562
Colombia	8613	8520	7962	13788	13154
U K	5501	16975	10050	6375	7150
Poland	4542	9601	11793	9450	7175
Others	38531	71515	55878	45012	64569
Total	**256486**	**285315**	**297455**	**226800**	**311388**

Year on Year Comparison of Exports - Brazil

	2024		2025	
Country	Qty (MT)	USD/MT	Qty (MT)	USD/MT
Russia	61364	1510	67648	1211
Algeria	40609	1579	38259	1122
China	612	1168	61603	907
Netherlands	21126	1799	24149	1476
South Africa	17900	1508	18119	1173
Colombia	13788	1537	13154	1337
Mexico	3200	1529	17283	1090
Ukraine	10564	1580	9562	1174

Poland	9450	1753	7175	1347
United Kingdom	6375	1621	7150	1393
Others	41812		47286	
Total	226800		311388	

Jan to June 2026 of Exports - Brazil

	Jan		Feb		Mar		Apr		May		Jun	
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**
Russia	6379	1104	6125	1072	6500	1072	7293	1086	6962	1107	9398	1134
Algeria	2658	1028	774	1149	1469	1170	5733	1168	10044	1180	11233	1208
South Africa	3263	1037	2323	1048	2888	1024	1272	1029	1525	1024	3100	1056
Netherlands	2375	1308	1950	1302	2149	1391	1575	1213	1450	1229	2700	1347
Ukraine	1040	1075	846	1055	903	1092	1027	1102	1707	1151	1228	1180
Egypt	625	1146	300	1020	450	1107	779	1182	1681	1206	2685	1223
Colombia	1725	1171	475	1147	544	1196	500	1186	1375	1171	1520	1172
Poland	875	1127	900	1136	700	1154	800	1174	1175	1161	600	1142
Spain	98	1276	263	1310	173	1329	1049	1259	1085	1226	1456	1248
Mexico	277	1040	663	1078	818	1150	888	1142	425	1148	508	1056
Others	4869	1108	3148	1108	2289	1084	2455	1131	3303	1162	5229	1096
Total	**24184**	**1113**	**17766**	**1111**	**18881**	**1124**	**23370**	**1135**	**30733**	**1156**	**39657**	**1171**

Jan to June 2025 Exports -Brazil

Country	January	February	March	April	May	June
Russia	7458	3200	4985	5604	5922	4063
Algeria	4083	2461	2704	3357	4005	2817
Netherlands	2000	1000	1125	2000	1100	1825
Colombia	1363	1019	915	1398	1245	1449
China	250	0	250	3730	775	2285
South Africa	1325	1325	1350	1400	1068	800
Mexico	50	825	875	1429	2551	1502
Ukraine	450	525	200	678	1209	811
U K	450	100	250	700	650	725
Spain	23	0	71	646	1044	911
others	3905	2551	2366	2678	3976	2908
Total	21356	13005	15091	23620	23544	20094

Indian Key Market Statistics

Groundnut — weekly rate table (12-Aug vs 19-Aug 2026)

Market	Origin	Variety	Count	12-Aug Min	12-Aug Max	19-Aug Min	19-Aug Max	WoW Change	WoW % Change
Hyderabad	**Telangana**	Java	60/65	13,600	13,700	13,600	13,700	0	0.00%
Hyderabad	**Gujarat**	Bold	50/60	10,700	10,700	10,500	10,500	-200	-1.87%
Hyderabad	**Gujarat**	Java	80/90	12,400	12,400	12,400	12,400	0	0.00%
Hyderabad	**MP/UP**	TJ	50/60	11,600	11,600	11,500	11,500	-100	-0.86%

Hyderabad	Banaskantha	TJ	50/60	12,500	12,500	11,700	11,700	-800	-6.40%
Chennai/Mumbai	Telangana	Java	60/65	13,600	13,700	13,600	13,700	0	0.00%
Chennai/AP	AP	Java	80/90	13,300	13,400	13,400	13,500	100	0.75%
Keshod	Gujarat	Java	50/60	12,800	12,800	12,600	12,600	-200	-1.56%
Keshod	Gujarat	Java	80/90	12,400	12,400	12,400	12,400	0	0.00%
Keshod	Gujarat	Bold	40/50	10,700	10,700	10,700	10,700	0	0.00%
Keshod	Gujarat	Bold	38/42	11,300	11,300	11,000	11,000	-300	-2.65%

FOREX (Against USD)

Currency	Aug 12, 2026	Aug 19, 2026	WoW %	YTD % Change
Argentine Peso (ARS)	1,490.98	1,495.01	0.27%	3.00%
Brazilian Real (BRL)	5.1629	5.1865	0.46%	-5.32%
Chinese Yuan (CNY)	6.7429	6.7382	-0.07%	-3.65%
Indian Rupee (INR)	95.364	95.669	0.32%	6.34%
Mozambican Metical (MZN)	63.89	63.89	0.00%	0.42%
Nigerian Naira (NGN)	1,362.20	1,350.98	-0.82%	-6.60%
Sudanese Pound (SDG)	600.1707	600.2207	0.01%	0.02%
Tanzanian Shilling (TZS)	2,650	2,647.73	-0.09%	7.63%
Euro (EUR)	0.8666	0.86	-0.76%	1.01%
West African CFA (XOF)	568.398	565.219	-0.56%	1.11%
Turkish Lira (TRY)	47.7578	47.9376	0.38%	11.39%

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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