July 22nd , 2026

Eventell Global Advisory Pvt Ltd

GLOBAL Peanut weekly

Market Insights

Volume - 03: Issue 29




SONACOS
Depuis 1975
Leader of the oilseed industry in Senegal
Niani
Huile d'Arachide Raffinée de Qualité Sup
L'HUILE DES GOURME
60 BOUTEILLES DE 1/4 LITRE
Qualité SONACOS SA
ArachOr
20 LITRES
Sunu Diw
Diwu A
Niinal
SANS CHOLESTEROL
Seel té sakane
15 LITRES
HUILE DE SOJA RAFFINEE
Qualité Suneor
www.sonacos.sn



Title Sponsor

Mamta Commodities

Organised by

8th WORLD SESAME & PEANUT CONFERENCE

Sesameinfo.in
Global Knowledge hub

Co Host

Cho những kỳ nghỉ như mơ
For dream holidays

Diamond Sponsor

MAST QALANDER GROUP OF COMPANIES
Benin - Pakistan - UAE

Platinum Sponsor

Afri Ventures

Gala Dinner Sponsor

inci

Strategic Country Partner - Mozambique

INSTITUTO DO ALGODÃO & OLEAGINOSAS MOÇAMBIQUE

Strategic Country Partner - Brazil

IBRAFE
Instituto Brasileiro de Feijão e Pulses

Lanyard Sponsor

vibgyor
International Commodity Broker

Delegate Badge Sponsor

VALENCY

Delegate Kit Sponsor

ATLASAGRO

Sesame Session Sponsor

JKT
JKT Group of Companies

Conference Room Partner

Balaji Agro Industries Pvt Ltd
Balaji
Pakistan

Lunch Sponsor

NES
Century Exports Ltd

Associate Sponsor

ALFA GROUP
AGROX GULF HOLDING

Peanut Session Sponsor

SONACOS
Depuis 1975

Classic Sponsor

Sri Sudha Sesamum
AGRO FOODS & EXPORTS PVT.LTD

Classic Sponsor

WAKMAN

Networking Break Sponsor

BIG
'GROWING FUTURE TOGETHER'

Networking Break Sponsor

jasmine trades

For sponsorship, exhibition & registration queries, contact: Ms Swapna
swapna@eventellglobal.com | +91 9342840609 | www.sesameconference.com | www.peanutconference.com

SUMMARY

USA: Strong crop conditions and improving field progress support a favorable harvest outlook despite lower prices and reduced marketings.

China: Weak to stable market as cautious buying ahead of the new harvest, lower oil mill demand, and sluggish consumption kept prices largely range bound.

India: Lower sowing progress in Gujarat keeps supply concerns elevated, supporting firm domestic prices.

Brazil: Reduced crop size and tight EU-grade supplies continue to limit export availability.

Nicaragua: Reduced acreage and weather uncertainty may limit next season's peanut production.

Argentina: Tight supplies, processing bottlenecks, and stricter EU aflatoxin inspections are expected to keep export availability constrained.

CHINA

- China's peanut market remained weak to stable this week as buyers maintained a wait-and-see approach ahead of the arrival of the new spring peanut crop.
- Weak downstream demand, reduced oil mill procurement, and softer peanut futures continued to weigh on market sentiment.
- Most major oil mills have completed seasonal purchases, resulting in limited buying activity.
- Regional prices were mostly stable to slightly lower, with wider quality-based price differences across producing regions.
- China imported 52,284 MT of peanuts in May, up 256.7% YoY, increasing overall market supply.
- The market is expected to remain range-bound in the near term, with harvest progress, weather conditions, opening prices in key producing regions, and downstream demand determining future price direction.

Prices

China Regional Prices (Week Ending)			Week-on-Week (2026)				Year-on-Year			
Market	Variety	Price (Yuan/MT)	Contract	15th July	22nd July	% Change	Contract	22nd July 25	22nd July 26	% Change
Shandong	General Grade	6,000–6,600	Oct	8,320	8,252	-0.8%	Oct	8,140	8,252	1.4%
Henan	Baisha	6,600–7,000	Nov	8,338	8,242	-1.2%	Nov	7,998	8,242	3.1%
Liaoning	308 Baisha	7,800–8,000	Dec	8,356	8,256	-1.2%	Dec	7,982	8,256	3.4%
Guangdong Market	Henan Baisha	7,600–8,200	Jan	8,360	8,276	-1.0%	Jan	8,000	8,276	3.5%
Guangxi Market	Henan Baisha	8,000–8,400								

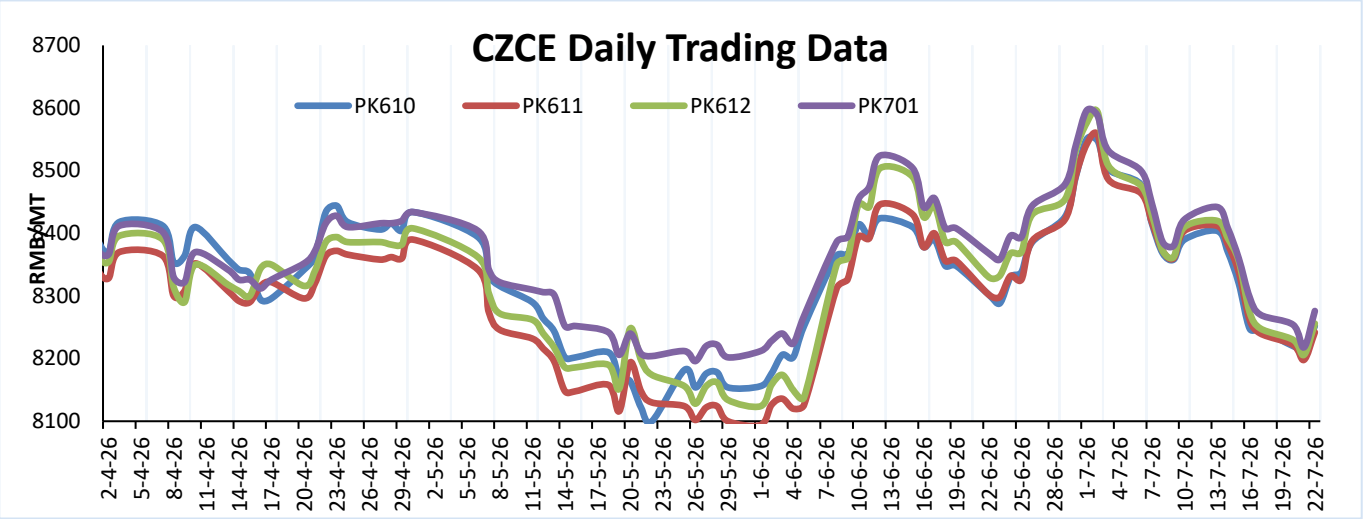
Zhengzhou Commodity Exchange Data

CZCE Daily Trading Data (22-07-2026)											
Contract Month	Prev. Settle	Open	High	Low	Close	Settlement	Change	Volume	Open Interest	OI Change	Turnover
PK610	8,216	8,270	8,278	8,230	8,242	8,252	36	46,833	1,10,411	-11,419	1,93,235
PK611	8,198	8,260	8,272	8,214	8,224	8,242	44	1,09,278	1,86,622	-36	4,50,358
PK612	8,206	8,286	8,286	8,230	8,244	8,256	50	35,908	43,720	-3,383	1,48,207
PK701	8,218	8,306	8,306	8,246	8,254	8,276	58	1,089	3,817	-16	4,506
Total								1,93,108	3,44,570	-14,854	7,96,305

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)

BRAZIL

- Brazil's 2026 peanut crop is estimated to be around 25% smaller than last season due to reduced harvested area.
- Overall crop quality is satisfactory; however, the availability of EU-grade edible peanuts remains limited.
- Processors and exporters continue to show limited selling interest, as current export prices do not adequately cover domestic production costs.
- Brazil is expected to export around 60,000 MT to the EU this season, reinforcing Argentina's position as the preferred origin for European buyers due to stronger supply availability and compliance.
- With another decline in planted area expected next season, Brazil is likely to remain a disciplined supplier rather than an aggressive exporter in the global peanut market.

NICARAGUA

- Nicaragua is expected to reduce peanut planted area for the 2026/27 season as farmers continue shifting to more profitable crops.
- Current supplies remain sufficient to meet near-term demand, but the outlook for the next crop is not favorable.
- Weather remains a key risk, with forecasts indicating a potential strong El Nino, which could negatively impact crop development.
- Nicaragua benefited this season from delayed harvests in Argentina and Brazil, allowing exports to enter the market at a favorable time.
- Lower planted area and weather uncertainty could tighten future supplies, making Nicaragua an important origin to monitor.

USA

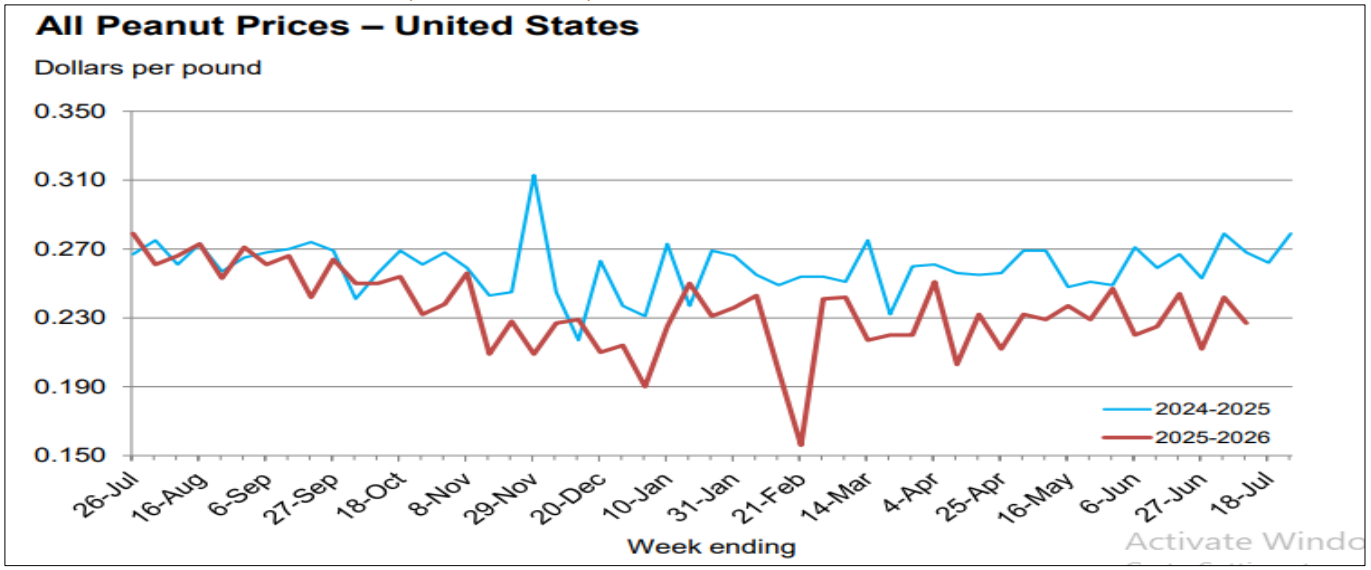
Prices: All-type average price was $0.227/lb for the week ending July 11, 2026 — down from $0.242/lb the prior week. Runner-type (the benchmark grade) was $0.212/lb, below the $0.229/lb of two weeks earlier.

2025-26 vs. 2024-25: Weekly prices have tracked well below last season's level for most of the marketing year (2025-26 line consistently under 2024-25 on the price chart), with a sharp dip to $0.16/lb in late February.

Pegging: 77% complete across the 8 major states as of July 19, 2026 — up sharply from 65% a week earlier, and just ahead of the 76% five-year average, though behind last year's 79%.

Crop condition: 53% good and 7% excellent (8-state average) as of July 19, 2026 — condition improved slightly from the previous week (53% good/8% excellent) but remains behind last year (59% good/10% excellent).

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			2021-2025 Average
	July 19, 2025	July 12, 2026	July 19, 2026	
	(percent)	(percent)	(percent)	(percent)
Alabama	74	60	76	70
Florida	92	78	83	88
Georgia	88	76	85	86
North Carolina	81	66	84	74
Oklahoma	38	27	49	41
South Carolina	80	76	80	84
Texas	38	20	38	34
Virginia	68	61	78	72
8 States	79	65	77	76

Peanut Condition

Peanut Condition – Selected States: Week Ending July 19, 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	23	62	9
Florida	1	4	26	68	1
Georgia	-	7	38	50	5
North Carolina	1	2	15	50	32
Oklahoma	2	13	30	52	3
South Carolina	3	10	25	56	6
Texas	8	1	41	48	2
Virginia	-	3	37	60	-
8 States	1	6	33	53	7
Previous week	1	7	31	53	8
Previous year	-	4	27	59	10

- Represents zero.

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

Peanut Prices and Marketings by Type – United States: June 13, 2026-July 11, 2026

Item and type	Week ending June 13, 2026	June 20, 2026	June 27, 2026	July 4, 2026	July 11, 2026
	(dollars per pound)	(dollars per pound)	(dollars per pound)	(dollars per pound)	(dollars per pound)
Average price					
Runner	0.225	0.238	0.212	0.229	0.212
Spanish	(X)	0.291	(X)	0.512	(X)
Valencia	(X)	(X)	(X)	(X)	(X)
Virginia	(X)	0.251	(X)	0.259	0.285
All	0.225	0.244	0.212	0.242	0.227
	(1,000 pounds)	(1,000 pounds)	(1,000 pounds)	(1,000 pounds)	(1,000 pounds)
Marketings [1]					
Runner	87,167	55,749	82,514	83,505	64,291
Spanish	-	4,092	-	1,935	-
Valencia	-	-	-	-	-
Virginia	-	22,986	-	31,656	16,421
All	87,167	82,827	82,514	117,096	80,712

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

Source: USDA

INDIA

- Gujarat groundnut sowing reached 60–65%, with 30–35% lower acreage than last year due to below-normal rainfall, although some trade estimates suggest the final decline could narrow to 5–10% if rains improve before the end of July.
- Sowing progress remained uneven, with 70% completed in Somnath-Gir, Bhavnagar, Junagadh, and Amreli, while the Jamnagar–Porbandar–Dwarka belt reported only 30% sowing due to rainfall deficits.
- Groundnut prices remained firm at ₹111–127/kg, supported by delayed sowing, limited market arrivals, and tightening government stocks.
- Government agencies continue to hold peanut stocks, though inventories are declining steadily following recent sales. High NAFED/NCCF auction prices have reduced buying interest from oil mills and exporters.
- Export activity remained subdued due to uncompetitive Indian prices. Direct exports to Indonesia remain suspended, with some shipments reportedly routed through Malaysia.
- The market will remain highly dependent on rainfall through the end of July. Any further delay in sowing or weak monsoon could tighten supplies and support prices, while improved rainfall may ease market concerns.

Summer 2026 CCE Estimates
Gujarat | Uttar Pradesh | West Bengal

Basis: Crop Cutting Experiment (CCE) survey estimates

STATE-LEVEL SUMMARY

State	Acreage 2026 (Ha)	Yield 2026 (kg/Ha)	Production 2026 (MT)	YoY Change (Acreage / Yield / Production)
Gujarat	68,400	1,639	1,15,312	+20.1% / -5.2% / +13.8%
Uttar Pradesh	1,93,949	2,631	2,58,095	-11.9% / -15.0% / -25.2%
West Bengal	56,009	2,437	1,36,466	-15.9% / -15.0% / -29.4%

GUJARAT - DISTRICT-WISE (CCE, SUMMER 2026)

District	Remote Sensing Acreage 2026 (Ha)	CCE Yield 2026 (kg/Ha)	CCE Production 2026 (MT)
Banaskantha	32,110	1,536	49,325
Bhavanagar	11,081	1,846	20,454
Kutch	4,892	1,821	8,908
Rajkot	2,896	1,681	4,868
Surendranagar	2,741	1,631	4,471
Other Districts	16,652	-	27,286
Total	**70,372**	**1,639**	**1,15,312**

UTTAR PRADESH - DISTRICT-WISE (CCE, SUMMER 2026)

District	Remote Sensing Acreage 2026 (Ha)	CCE Yield 2026 (kg/Ha)	CCE Production 2026 (MT)
Mainpuri	36,195	2,629	95,173
Farrukhabad	18,476	2,768	51,144
Hardoi	16,421	2,516	41,307
Kannauj	13,506	2,649	35,771
Etawah	8,841	2,543	22,480
Other Districts	4,644	-	
Total	**98,083**	**2,631**	**2,58,095**

WEST BENGAL - DISTRICT-WISE (CCE, SUMMER 2026)

District	Remote Sensing Acreage 2026 (Ha)	CCE Yield 2026 (kg/Ha)	CCE Production 2026 (MT)
Hooghly	17,945	1,983	35,050
West Medinipur	13,485	2,394	32,281
East Medinipur	9,237	3,438	31,775
Other Districts	15,342	-	37,381
Total	**56,009**	**2,437**	**1,36,466**

- Gujarat: acreage up, yield down slightly, production up on higher area sown.
- Uttar Pradesh & West Bengal: acreage, yield and production all down vs. Summer 2025.
- 5–10% (Gujarat) / 10–20% (UP, WB) of harvested produce is retained on-farm for consumption/seed and may not enter mandi markets.

ARGENTINA

- Harvest has accelerated as drier weather improved field access, though high-moisture peanuts continue to slow processing due to extended drying requirements.
- Drying capacity has become a key challenge, with processors lacking integrated drying facilities expected to face shipment delays.
- From July 2026, 20% of Argentine peanut shipments to the EU will undergo aflatoxin inspections, likely extending export lead times.
- Argentina's 2026 crop remains tighter, with planted area estimated 20% lower YoY and rising production costs supporting firm export offers.
- Tight supplies, stricter EU inspections, and higher costs are expected to keep Argentine exporters disciplined, particularly for edible grades and larger kernels.

STATISTICS

Year wise Imports of Netherlands (Quantity) (MT)

Country	2021	2022	2023	2024	2025
Argentina	224279	250699	220462	176496	234612
Brazil	19854	17996	22996	21360	22523
China	16681	15523	11073	22069	25525
USA	16223	24157	46001	66012	20926
Germany	11782	12555	17518	13635	12490
Nicaragua	7865	12025	14142	15694	10310
Egypt	5916	2901	1888	1505	1750
India	3368	4649	2612	4640	2973
Spain	3215	1009	2874	3656	787

U K	2950	347	774	554	363
Others	4074	6326	4867	8047	7603
Total	316206	348186	345208	333669	339862

Year on Year Comparison of Imports - Netherlands

2024			2025		
Country	Qty (MT)	USD/MT	Country	Qty (MT)	USD/MT
Argentina	1,76,496	1846	Argentina	2,34,612	1566
USA	66,012	1698	China	25,525	1872
China	22,069	2031	Brazil	22,523	1537
Brazil	21,360	1861	USA	20,926	1619
Nicaragua	15,694	1886	Germany	12,490	2172
Germany	13,635	2182	Nicaragua	10,310	1656
India	4,640	2276	Denmark	3,691	1734
Paraguay	3,829	1602	India	2,973	2318
Spain	3,656	1828	Paraguay	1,778	1471
Egypt	1,505	2376	Egypt	1,750	2358
Others	4,773		others	3,284	
Total	**3,33,669**		Total	**3,39,862**	

Q1 2025 vs 2026 of Imports - Netherlands

Jan to April 2025			Jan to April 2026		
Country	Qty (MT)	USD/MT	Country	Qty (MT)	USD/MT
Argentina	85109	1712	Argentina	79180	1287
China	10751	1909	Brazil	7799	1346
USA	7757	1670	China	7514	1918
Germany	5769	2212	Germany	5235	1971
Brazil	5500	1838	USA	3541	1560
Nicaragua	1713	1666	Paraguay	1906	1497
Denmark	1304	1670	Nicaragua	1356	1433
India	1109	2112	South Africa	1020	2469
Egypt	738	2324	Egypt	930	2512
Paraguay	550	1740	Denmark	826	1710
Others	1193		Others	903	
Total	121495		total	110211	

Indian Key Market Statistics

Groundnut Seed Rate

Market	Origin	Variety	Count	15-Jul Min	15-Jul Max	22-Jul Min	22-Jul Max	WoW Change	WoW % Change
Hyderabad	Telangana	Java	60/65	13500	13500	13300	13400	-150	-0.0111
	Banaskantha	TJ	50/60	12700	12700	12900	12900	200	0.0157
Mundra/Pipavav	Banaskantha	TJ	80/90	12300	12300	12700	12700	400	0.0325

FOREX (Against USD)

Currency	July 15, 2026	July 22, 2026	WoW %	Year to Date % Change
Argentine Peso (ARS)	1470.47	1477.7	0.49%	1.81%
Brazilian Real (BRL)	5.0721	5.0732	0.02%	-7.39%
Chinese Yuan (CNY)	6.775	6.773	-0.03%	-3.16%
Indian Rupee (INR)	96.517	96.672	0.16%	7.45%
Mozambican Metical (MZN)	63.89	63.88	-0.02%	0.41%
Nigerian Naira (NGN)	1380.66	1375.48	-0.38%	-4.91%
Sudanese Pound (SDG)	600.1707	600.2207	0.01%	0.02%
Tanzanian Shilling (TZS)	2635	2640	0.19%	7.32%
Euro (EUR)	0.876	0.8767	0.08%	2.97%
West African CFA (XOF)	574.516	575.149	0.11%	2.89%
Turkish Lira (TRY)	47.0315	47.2176	0.40%	9.72%

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 - For feedback, suggestions, or queries, please contact our Analyst, Shravanthi, at peanutinfo@eventellglobal.com or call +91 95133 33926.

Subscribe: To receive this report regularly, please write to Swapna Gowda at swapna@eventellglobal.com.

Advertising Opportunities: To advertise in this report, please contact Swapna Gowda at swapna@eventellglobal.com.

Eventell Global Advisory Private Limited

Corporate portal:

www.eventellglobal.com

Info portals:

www.sesameinfo.in

www.cashewinformation.com

www.bullionworld.in

www.invtrustinfo.com

Conference portals:

www.cashewconference.com
www.cashewindiabsm.com
www.sesameconference.com
www.goldconference.in
www.asiapacificpmc.com
www.silverconference.in

www.event.allindiacashew.com

Social initiative portals:

www.cashewomen.com

www.cashewishealthy.com

Disclaimer

The data and information presented in this report are based on the efforts of analysts at Eventell Global Advisory Pvt Ltd, Bangalore, and opinions and data obtained from experts and various industry sources. While sufficient care has been taken to, check data and information prior to publishing, Eventell or its employees or external contributors will not be responsible for any kind of errors or omissions or misrepresentation of data or for losses incurred by any party either directly or indirectly based on the information published herein.