July 29th, 2026

Eventell Global Advisory Pvt Ltd

GLOBAL Peanut weekly

Market Insights

Volume - 03: Issue 30




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SUMMARY

USA: U.S. peanut stocks rose 70% YoY to 3.61 billion lb, reflecting ample supply, while farmer-stock prices edged up and marketings weakened.

China: China's peanut market stayed soft, with weak demand and ample old-crop stocks offsetting support from higher imports and weather-related new-crop delays.

India: India's groundnut market is expected to remain stable, with ₹106–107/kg bold kernels, while high government stocks and weak exports cap upside.

Brazil: Brazil's record 2026 crop is boosting shelled groundnut exports to 39,660 MT in June, while weaker crude oil shipments to China reflect softer oil demand.

Guinea: Guinea's groundnut crop is developing well, but tight old-crop stocks are supporting prices, with shelled groundnuts at 11,000–17,000 GNF/kg in Upper Guinea.

Senegal: Senegal's groundnut market remains firm, with sowing 60% complete, tight supplies and prices at FCFA 700–800/kg.

CHINA

China's peanut market remained **largely stable with a neutral-to-weak tone** during the week ending July 23. Imported Sudanese peanuts held at around **CNY 8,100/MT**, while domestic general-grade peanuts rose slightly to **CNY 7,473/MT** and commercial-grade peanuts declined to **CNY 8,100/MT**. Oil-grade peanuts remained stable at **CNY 7,454/MT**.

Old-crop supply remains adequate, particularly in Northeast China, while Henan prices weakened as stocks were actively cleared ahead of the new crop. Peanut inventories at sampled oil mills fell for the sixth consecutive week to **270,300 MT**, down 6.97% WoW. However, demand remains weak, with several oil mills halting procurement and processors making only limited purchases.

China's January–June peanut imports reached 196,300 MT, up 103,700 MT YoY, despite June imports declining month-on-month. Early new-crop arrivals have been delayed by around one week due to rainfall, with limited volumes expected from Jiangxi by late July and Henan/Hubei from mid-August.

Weak demand, negative crushing margins and ample old-crop availability are keeping prices under pressure, while rainfall and new-crop development remain the key factors to watch.

Prices

Week-on-Week (2026)				Year-on-Year			
Month	22nd July	29th July	% Change	Month	29th July 25	29th July 26	% Change
Oct	8,252	8,256	0.05%	Oct	8,090	8,256	2.05%
Nov	8,242	8,256	0.17%	Nov	7,992	8,256	3.30%
Dec	8,256	8,268	0.15%	Dec	7,990	8,268	3.48%
Jan	8,276	8,298	0.27%	Jan	8,014	8,298	3.54%

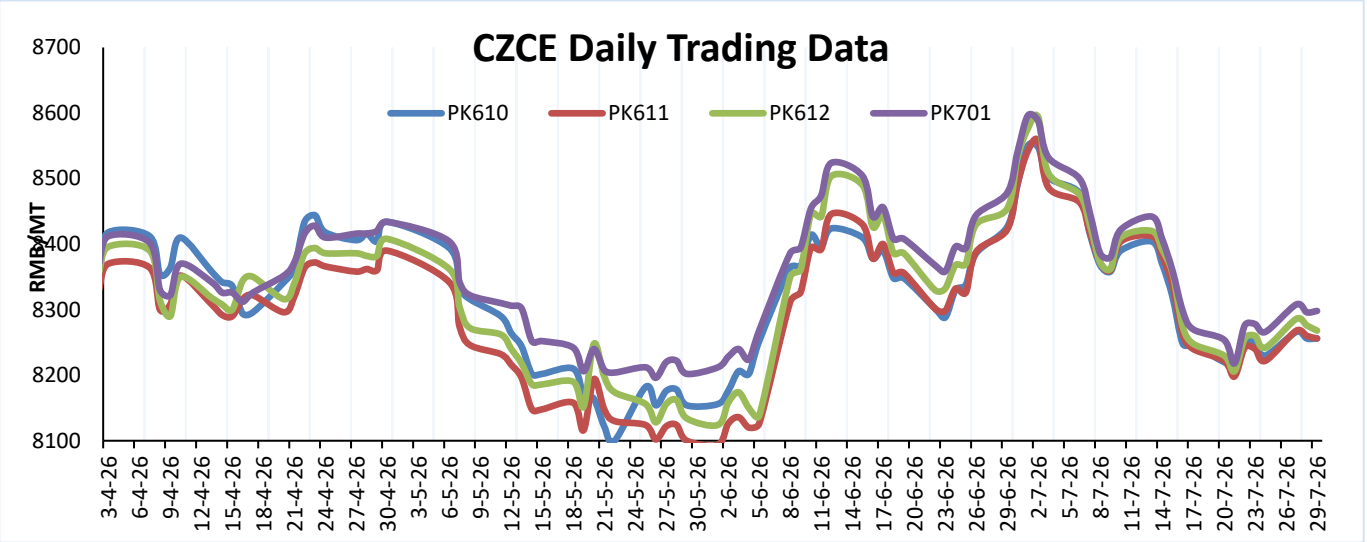
Zhengzhou Commodity Exchange Data

Contract Month	Prev. Settle	Open	High	Low	Close	Settlement	Change	Volume	Open Interest	OI Change	Turnover
PK610	8,256	8,260	8,272	8,244	8,246	8,256	0	15,992	97,208	-1,017	66,015
PK611	8,260	8,260	8,280	8,246	8,246	8,256	-4	1,58,265	1,83,648	-9,190	6,53,352
PK612	8,276	8,280	8,290	8,262	8,266	8,268	-8	1,01,398	41,559	-1,270	4,19,174
PK701	8,296	8,300	8,314	8,284	8,290	8,298	2	678	4,021	4	2,813
Total								2,76,333	3,26,436	-2,868	11,41,354

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)

GUINEA

Groundnut production activities are progressing well in Guinea, supported by increased and well-distributed rainfall across the main production areas.

Early sown groundnut varieties have reached advanced flowering to pod formation, while late varieties are mainly at the stem elongation stage. Early planted fields are showing strong vegetation growth and good crop establishment, pointing to promising production prospects for the current season.

Overall, favorable rainfall conditions are supporting crop development and could lead to higher groundnut production this season.

However, commercial availability remains very tight due to depleted stocks from the previous season, resulting in seasonal price increases.

In **Upper Guinea**, wholesale shelled groundnut prices in consumer markets are currently reported at **11,000–17,000 GNF/kg (720–1,110 FCFA/kg)**, while fresh inshell groundnuts from market gardens are trading at **5,500–6,500 GNF/kg (360–425 FCFA/kg)**.

For **traders and processors**, limited old crop stocks keep procurement conditions firm, while **exporters and importers** may face restricted availability nearby until the new crop reaches the market.

The combination of favourable crop conditions and tight old-crop stocks is creating a **firm near-term market**, with prices expected to remain supported until the next harvest.

BRAZIL

Brazil's record 2026 groundnut crop has significantly boosted export availability, with shelled groundnut shipments reaching **39,660 MT in June**, nearly twice the levels recorded in the corresponding months of 2024 and 2025.

Export volumes is on an upward trend since March, supported by increased demand from **Russia, Algeria, and Egypt**, reflecting improved availability from the new crop.

Meanwhile, **crude groundnut oil exports have weakened**, with June shipments at **13,200 MT**, primarily due to lower exports to China. The contrasting performance between kernels and oil indicates that Brazil's strong crop is currently translating more strongly into **higher kernel export availability**, while demand for groundnut oil remains softer.

For **traders and exporters**, increased kernel availability is supporting stronger export flows and improving Brazil's competitiveness in international markets. **Importers** may have greater opportunities to source Brazilian kernels, particularly for shipments to Russia, Algeria and Egypt.

USA

Stocks: Commercial peanut stocks stood at **3.61 billion lb** on June 30, 2026, up sharply from **2.12 billion lb** a year earlier (**+70% YoY**), indicating comfortable availability.

Shelled stocks: Total shelled peanut stocks were **684 million lb**, including **655 million lb** of edible grades and **29.1 million** lb of oil stocks.

Stocks by type: Runners accounted for **492 million lb**, followed by Virginias & Valencias at **129 million lb** and Spanish at **34.7 million lb**.

Processing: June millings reached **454 million lb**, with Runners contributing **364 million lb**.

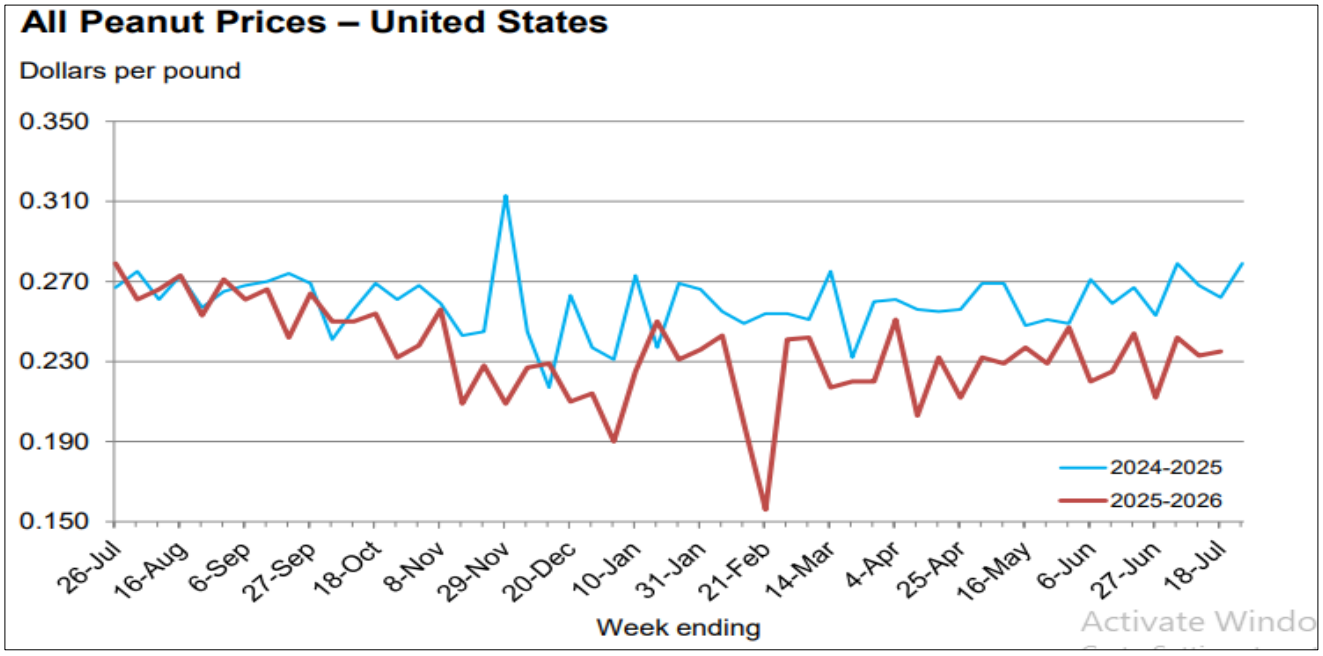
Domestic usage: Processors used **206 million lb** of edible shelled peanuts in June, mainly for peanut butter **(127M lb)**, followed by snacks (38.1M lb) and candy (35.3M lb).

Oil crushing: 68.6 million lb of peanuts were crushed for oil, cake and meal.

Farmer prices: Average farmer-stock peanut prices rose slightly to **23.5¢/lb** for the week ending July 18, while Runner prices declined to **20.8¢/lb**.

Marketings: Farmer-stock peanut marketings fell to **82.0 million lb**, down **15.5 million lb week-on-week**. Runner marketings dropped sharply to **44.9 million lb**.

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 26, 2025	July 19, 2026	July 26, 2026	
	(percent)	(percent)	(percent)	(percent)
Alabama	82	76	84	81
Florida	97	83	87	93
Georgia	93	85	90	92
North Carolina	93	84	97	86
Oklahoma	51	49	58	52
South Carolina	88	80	90	89
Texas	53	38	48	48
Virginia	76	78	91	80
8 States	86	77	84	84

Peanut Condition

Peanut Condition – Selected States: Week Ending July 26, 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	19	62	13
Florida	1	3	18	77	1
Georgia	1	7	33	53	6
North Carolina	1	1	17	47	34
Oklahoma	3	16	29	50	2
South Carolina	1	6	34	56	3
Texas	1	3	43	50	3
Virginia	-	2	44	54	-
8 States	1	5	30	56	8
Previous week	1	6	33	53	7
Previous year	1	4	27	57	11

- Represents zero.

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

Peanut Prices and Marketings by Type – United States: June 20, 2026-July 18, 2026

Item and type	Week ending				
	June 20, 2026	June 27, 2026	July 4, 2026	July 11, 2026	July 18, 2026
	(dollars per pound)	(dollars per pound)	(dollars per pound)	(dollars per pound)	(dollars per pound)
Average price					
Runner	0.238	0.212	0.229	0.223	0.208
Spanish	0.291	(X)	0.512	(X)	(X)
Valencia	(X)	(X)	(X)	(X)	(X)
Virginia	0.251	(X)	0.259	0.285	0.267
All	0.244	0.212	0.242	0.233	0.235
	(1,000 pounds)	(1,000 pounds)	(1,000 pounds)	(1,000 pounds)	(1,000 pounds)
Marketings [1]					
Runner	55,749	82,514	83,505	81,097	44,913
Spanish	4,092	-	1,935	-	-
Valencia	-	-	-	-	-
Virginia	22,986	-	31,656	16,421	37,135
All	82,827	82,514	117,096	97,518	82,048

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

Source: USDA

INDIA

- **Prices:** Groundnut prices are expected to remain mostly stable, with limited movement of around **₹2/kg** in the near term. Bold kernels are currently around **₹106–107/kg**.

- **Gujarat:** Sowing is expected to be close to last year's level, with the decline likely limited to **10–15%**. Crop conditions are currently good due to recent rainfall.
- **Rajasthan:** Sowing is expected to increase by around **20–25% YoY**, although more rain is needed in **Barmer and Jaisalmer**.
- **New Crop:** Gujarat's new groundnut arrivals are expected from around mid-September.
- **Government Stocks:** Large stocks remain with government agencies, which may limit any sharp price increase. Auction sales have recently been slow.
- **Exports:** Export demand remains weak due to poor price parity, particularly for groundnut oil. Domestic demand is currently supporting the market.
- **Indonesia:** A reopening of Indonesian buying around mid-August could provide an upside trigger, especially for **Java/TJ varieties**.

SENEGAL

Groundnut sowing is progressing in Senegal, with approximately **60% of planting completed in Casamance and the Groundnut Basin**, the country's two key production regions.

The season has started late, with **contrasting rainfall patterns** across the country. Good rainfall in the East and South during June has supported field activities, while dry spells in central and northern areas have delayed sowing.

The distribution of agricultural inputs is progressing smoothly through government established commissions across the country, supporting farmers during the ongoing planting campaign.

Meanwhile, groundnut availability remains low in consumer and processing markets as authorities are using this period to secure and build stocks. Traders currently hold very limited quantities of shelled groundnuts for human consumption, keeping nearby supply tight. Prices are reported at **FCFA 700–800/kg**.

For **traders and processors**, limited spot availability and government stock accumulation are likely to keep procurement conditions firm. **Exporters** may face tighter access to exportable lots if government buying continues,

The key factors to watch in the coming weeks are **rainfall, sowing progress, government stock accumulation and the availability of old-crop groundnuts**. A continuation of dry conditions in central and northern production areas could increase concerns over new-crop supply.

STATISTICS

Year wise Imports of Germany (Quantity) (MT)

Country	2021	2022	2023	2024	2025
Argentina	162152	79700	72226	71711	94594
Netherlands	17259	101378	98036	103164	94300
USA	4529	1028	12895	17010	3732
Nicaragua	5349	9244	9750	8400	3150
China	5469	3104	4995	12356	6957
South Africa	13532	3679	5012	1780	6399
India	4692	7118	2178	7825	7487
Brazil	934	2882	744	3153	3250
Austria	2067	2327	1493	1629	1974
Poland	1124	572	1046	1736	549
Others	8357	2769	1942	4513	3768
Total	225463	213800	210317	233277	226159

Year on Year Comparison of Imports – Germany

Country	2024		2025	
	Quantity(MT)	USD/MT	Quantity(MT)	USD/MT
Netherlands	103164	2278	94300	2100
Argentina	71711	1653	94594	1531
USA	17010	1936	3732	2123
China	12356	2016	6957	2394
India	7825	1885	7487	2183
Nicaragua	8400	1457	3150	1329
South Africa	1780	2251	6399	2240
Brazil	3153	1586	3250	1399
Austria	1629	1849	1974	2171
Paraguay	1530	1836	1706	1266
Others	4719		2612	
Total	**233277**		**226159**	

Jan to May 2025 vs 2026 of Imports - Germany

Jan to May - 2025			Jan to May - 2026		
Country	Quantity(MT)	USD/MT	Country	Quantity(MT)	USD/MT
Netherlands	46427	2035	Argentina	73942	1225
Argentina	28156	1710	South Africa	9578	1743
India	5016	1921	China	3410	2056
China	3697	2381	Nicaragua	2900	895
Nicaragua	3050	1330	Brazil	2442	1253
USA	2168	2133	USA	1411	1086
South Africa	1268	2356	Paraguay	1138	1045
Austria	809	1979	Netherlands	1082	2279
Egypt	615	2501	Austria	766	2090
Paraguay	436	1505	Egypt	499	2724
Others	913		Others	651	
Total	**92554**		**Total**	**97820**	

May 2025 vs May 2026

May-25			May-26		
Country	Quantity (MT)	USD/MT	Country	Quantity (MT)	USD/MT
Netherlands	9266	2096	Argentina	13615	1271
Argentina	6971	1538	South Africa	1853	1839
India	1510	2000	USA	837	964
China	1206	2567	Nicaragua	750	949
Nicaragua	1200	1267	China	585	2393
USA	185	2124	Brazil	297	1267
Poland	144	3495	Netherlands	99	2120
Austria	104	2393	Egypt	66	3139
Egypt	51	2653	Austria	49	2471
South Africa	50	2560	Paraguay	48	1582
Others	126		Others	49	
Total	20814		Total	18248	

Peanut Stocks as per USDA

Peanut Stocks and Specified Products at Month's End - United States: June 2026 with Comparisons

Month	Farmer Stock	Shelled Peanuts	Roasting Stock	Total (FS Equiv.)
Apr 2026	3,450,958	734,286	48,254	4,475,812
May 2026	3,073,455	703,658	43,887	4,053,207
Jun 2026	2,660,520	684,482	43,914	3,614,795
Jun 2025 (YoY)	1,372,422	527,161	44,221	2,117,767

Shelled Peanuts and Roasting Stock (in Shell) at Month's End - United States: June 2026 with Comparisons

Type	Stocks	Millings (June)
Virginias & Valencias	128,529	83,042
Runners	492,059	364,000
Spanish	34,748	7,352
Total	655,336	454,098

Shelled Peanuts (Raw Basis) Used in Primary Products and In Shell Peanuts by Month – United States: June 2026 with Comparisons

Product	June 2026	May 2026	June 2025
Peanut butter	126,887	128,543	127,529
Peanut candy	35,278	30,895	40,264
Peanut snacks	38,127	41,635	36,109
Total edible use	206,330	207,130	208,260

Indian Key Market Statistics

Groundnut — weekly rate table (22-jul vs 29-jul 2026)

Market	Grade	22-Jul	29-Jul	Trend
Mundra/Pipavav Port	Bold 50/60	11,000	10,600	↓ 400
Mundra/Pipavav Port	40/50	11,200	10,800	↓ 400
Mundra/Pipavav Port	38/42	11,600	11,200	↓ 400
TJ Banaskantha (New)	80/90	12,700	12,400	↓ 300
TJ Banaskantha (New)	50/60	12,900	12,600	↓ 300
TJ Banaskantha (Old)	80/90	11,500	11,200	↓ 300
TJ Banaskantha (Old)	50/60	12,000	11,700	↓ 300
Challakere Export	80/90	13,000/13,100	12,700/12,800	↓ 300
Challakere Export	70/80	13,200/13,300	12,900/13,000	↓ 300
Challakere Export	60/70	13,500/13,600	13,200/13,300	↓ 300
Challakere Export	60/65	13,700/13,800	13,400/13,500	↓ 300
Karnataka Summer	60/70	13,400/13,500	13,200/13,300	↓ 200
Karnataka Summer	70/80	13,200/13,300	12,900/13,000	↓ 300
Karnataka Summer	80/90	12,900/13,000	12,600/12,700	↓ 300
AP/Telangana	60/70	13,100/13,200	13,000/13,100	↓ 100
AP/Telangana	60/65	13,300/13,400	13,200/13,300	↓ 100
AP/Telangana	90/100	12,400/12,500	12,300/12,400	↓ 100
Tiruvannamalai	Red 80/90	13,700	13,300	↓ 400
Tiruvannamalai	White 80/90	12,900	12,600	↓ 300
Nandikutkur GN Pod	80/90	12,200	12,200	→ 0
Nandikutkur GN Pod	70/80	12,600	12,600	→ 0
Nandikutkur GN Pod	60/70	12,800	12,800	→ 0
Nandikutkur GN Pod	60/65	13,200	13,200	→ 0
Nandikutkur GN Pod	140/160	10,800	10,800	→ 0

FOREX (Against USD)

Currency	July 22, 2026	July 29, 2026	WoW %	Year to Date % Change
Argentine Peso (ARS)	1477.7	1,499.76	1.49%	3.32%
Brazilian Real (BRL)	5.0732	5.1212	0.95%	-6.51%
Chinese Yuan (CNY)	6.773	6.7663	-0.10%	-3.25%
Indian Rupee (INR)	96.672	95.742	-0.96%	6.42%
Mozambican Metical (MZN)	63.88	63.89	0.02%	0.42%
Nigerian Naira (NGN)	1375.48	1,365.24	-0.74%	-5.62%
Sudanese Pound (SDG)	600.2207	600	-0.04%	-0.01%
Tanzanian Shilling (TZS)	2640	2,635.01	-0.19%	7.11%
Euro (EUR)	0.8767	0.8785	0.21%	3.18%
West African CFA (XOF)	575.149	576.02	0.15%	3.04%
Turkish Lira (TRY)	47.2176	47.3976	0.38%	10.14%

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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