

# PEANUT TARIFF

# POST

APR 2025

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# MARKET WIZARD

## Tariffs, Trade Wars & Tensions: Why the Global Peanut Industry is "Shell" Shocked

The global peanut industry is facing a trade war-induced crunch as the United States, Canada, Mexico, and the European Union impose reciprocal tariffs on each other's goods. With peanut-based products caught in the crossfire, what does this mean for farmers, exporters, and consumers? Let's break it down.

### U.S. Fires the First Shot: Tariffs Shake Up Trade Relations

The U.S. recently imposed a 25% tariff on imports from Canada and Mexico, aiming to address trade imbalances. However, this move has sparked retaliatory actions that directly impact the peanut industry.

### Canada's Retaliation: Peanut Butter Caught in the Trade War

Canada didn't sit back. In response to U.S. tariffs, it imposed a 25% retaliatory tariff on several agricultural products, including peanut butter.

This spells trouble for American peanut producers, as Canada is a major consumer of U.S. peanut products worth US\$232 million/year. For Canadian businesses and consumers, this means higher prices of peanut butter—a staple in many households. Canadian brands may look for alternative suppliers, potentially shifting their peanut imports to countries like Argentina, Brazil or India.

### EU Joins the Trade War Party

The European Union wasn't spared either. The U.S. announced that it would impose 25% tariffs on steel, aluminium, and derivative



EU imposed tariff on

**\$28  
BILLION**

worth of American goods, including peanut butter.

products from EU imports, prompting the EU to respond with tariffs \$28 billion worth of American goods, including peanut butter.

This could hurt U.S. exports to Europe, which represents another crucial market for American peanut products. European buyers might start favoring alternative suppliers, further shrinking U.S. peanut butter exports.

### Are U.S. Peanut Exports at Risk?

Canada and Mexico are the largest importers of U.S. peanuts, making this tariff war a potential disaster for American peanut farmers and processors. In fact, over the past five marketing years, 57% of U.S. processed peanut exports have gone to these two countries, making them critical markets for American peanut farmers. Meanwhile, Mexico, Canada, China, and the European Union account for 90% of raw U.S. peanut



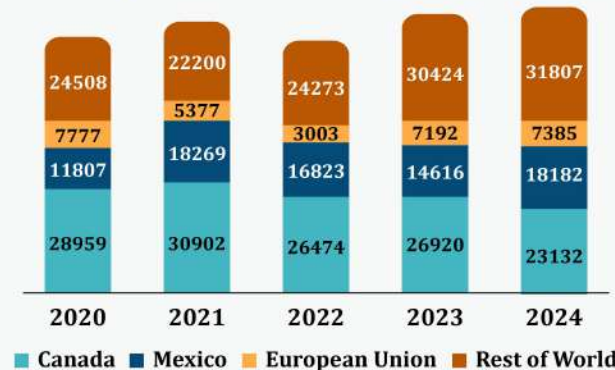
exports, meaning the U.S. peanut industry is heavily dependent on these trading partners. With demand from these key markets threatened, U.S. peanut exports are at risk of losing millions in revenue. The U.S. exports approximately 22% of its total harvest.

### What's Next for the Global Peanut Market?

The ongoing tariff war is more than just a political showdown—it's a real economic shift that could reshape the global peanut industry. If the U.S. loses key export markets, American peanut farmers

could face lower profits and reduced demand. Meanwhile, emerging peanut exporters are positioned to take advantage of shifting trade routes. Will the U.S. negotiate its way out of this peanut mess? Or will alternative suppliers take over the market for good? One thing is certain: the global peanut industry is in for a bumpy ride.

### Processed Peanut (incl. Peanut Butter) in Tons





# Global Markets

## ARGENTINA



Private and public sources, including the Secretariat of Agriculture, estimate that Argentina's 2024/25 peanut crop has reached a record 500,000 hectares. Lower prices for corn, soy, and other commodities, combined with higher peanut prices, encouraged independent farmers—many planting peanuts for the first time.

As a result, peanut companies contracted a record number of acres, making MY2024/25 likely the largest peanut planting in Argentina's history.

According to Georgalos Peanut World, despite four heat waves, an estimated yield of 3.6 TM/Ha could bring total production to 1.8 million metric tons of in-shell peanuts. By March 17, 2025, soil moisture had recovered well after heavy rains. If conditions remain stable, expectations for the crop's productive potential are highly optimistic.

## BRAZIL



The cultivated area for the 2025 crop has expanded by approximately 20%. Overall, crop growth was excellent until February, when a prolonged dry spell of 20 to 30 days affected key peanut-producing regions. Currently, the harvest is 35-40% complete and is expected to be completed by early May. However, peanut-growing areas still require additional rainfall to ensure a successful harvest. While initial yields exceeded 4 mt/ha, they have gradually declined throughout the harvesting process. Despite this, the quality of the crop remains good so far, though the lack of rainfall continues to be a concern.

## USA

At the American Peanut Shellers Association Pre-Harvest meeting, Kris Balkcom from Auburn University reported planting intentions at 1,922,000 acres, a 6.7% increase from last year's 1,801,000 acres. Weak competing markets add bearish pressure to the peanut market. State Peanut Specialists estimate an 8.5% acreage rise (150,000 acres) for 2025. Georgia may reach 925,000 acres (+9.5%), Alabama 200,000 acres (+7.5%), and Florida 173,000 acres (+10%). Last year's peanut acreage grew significantly by 12%.



## PEANUT SPOTLIGHT

### INDIA

In Gujarat, summer sowing has reached 42% of the target, covering 24,292 hectares. New summer crops are expected by late May or early June. In Junagadh, about 40% of the stock remains, mainly bold varieties, expected to last throughout the year. Factories have begun operations but at a slow pace, with some shifting to coriander production. In Kutch, most stock is sold, leaving only a few stockists with inventory. Factories there are focusing on beans, custard, cumin, and mustard seeds. Pathawada has limited stock, with only 7-10% remaining with stockists, while Rajasthan still has stock, but market

activity is sluggish with limited purchases. Pathawada's sowing is low, focusing on Java varieties, while sowing in Kutch and Himatnagar is progressing steadily.

In the Southern Region, Tamil Nadu is seeing good arrivals of larger peanut sizes, but smaller sizes contain more immature seeds. Despite a 40% drop in crop size, arrivals will continue for 3-4 months. Karnataka, Andhra Pradesh, and Telangana are receiving high-quality crops, with Kadiri performing well in Anantapur. Maharashtra's crop is in good condition, expected by April-end, while Odisha has begun arrivals, supplying local and

West Bengal markets. Demand from the Southeast Asian market is at historic lows, with this year's Ramadan demand proving to be a washout. Trading prices for 80/90 peanuts are ranging between \$800/ton and \$900/ton. Shippers are facing significant losses, while importers are grappling with missed opportunities.



### CHINA

The peanut spot market remains stable but weak, with prices fluctuating in a narrow range. Trading activity is subdued, as both buyers and sellers engage cautiously. Transactions are mainly negotiated based on oil yield rates and sellers' willingness to release inventory. Farmers and traders show moderate selling interest, but many prefer to hold stocks. Supply remains tight, and local inventories are low. Some sellers seek profits but are reluctant to sell at lower prices. Peanut processing factories face high cost pressures, leading to cautious procurement and reduced production. Downstream demand remains weak, with sluggish domestic sales and low trader procurement interest. Oil factories strictly regulate purchases, further dampening confidence.

Currently, peanut prices remain stable, with Blanched 25/29 at \$1,285 FOB and Blanched 29/33 at \$1,260 FOB. High-quality Sudanese peanuts in Huangdao Port are 8,100 RMB/MT, first-grade peanut oil averages 14,400 RMB/MT, and the USD to RMB exchange rate is 7.25.

## OTHER'S

**South Africa** Harvest has started; however, weather in the next eight weeks may impact crop quality.

**Indonesia** Indonesia's peanut harvest has begun, but the crop is not fully dried yet. Wet in-shell peanuts are priced at \$485/ton, while dried in-shell peanuts are at \$905/ton. Indonesian local peanut kernels are priced at \$1,360/ton in the domestic market. International prices are declining due to strong crops in Argentina and Brazil.

**Sudan** Sudan has a limited quantity of peanuts available for shipment, with very good quality. Sudan 80/90 peanuts are currently priced at \$1000-1050 C&F Jakarta.

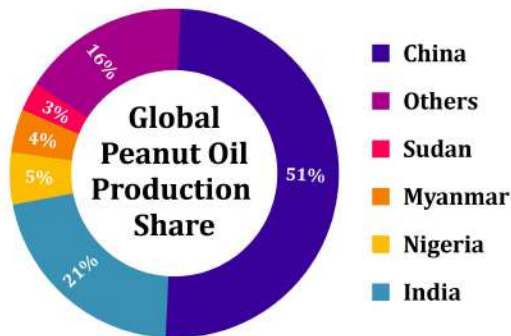
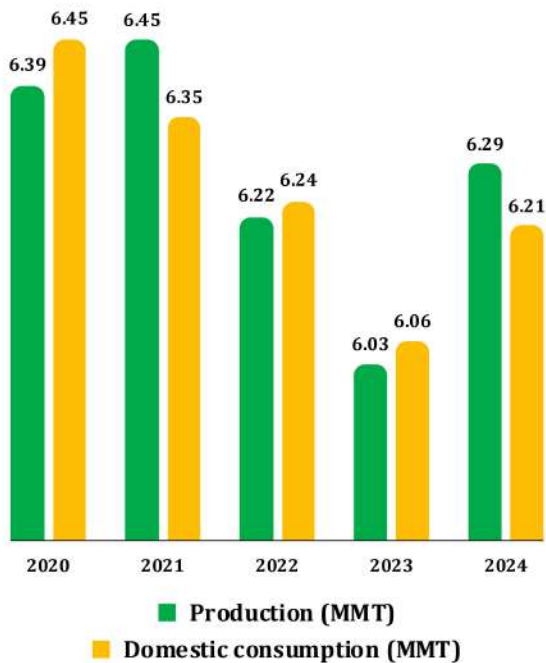
**Senegal** Peanut exports from Senegal are authorized starting March 25. This decision follows mid-term results showing strong seed and oil mill seed collection, leading to the suspension of the previous restrictions.



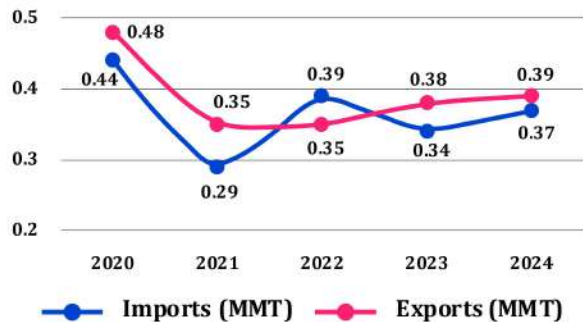


# DEMAND & SUPPLY

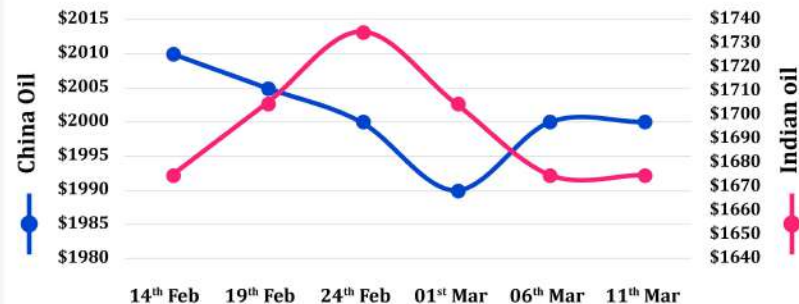
## Global Peanut Oil Production & Consumption



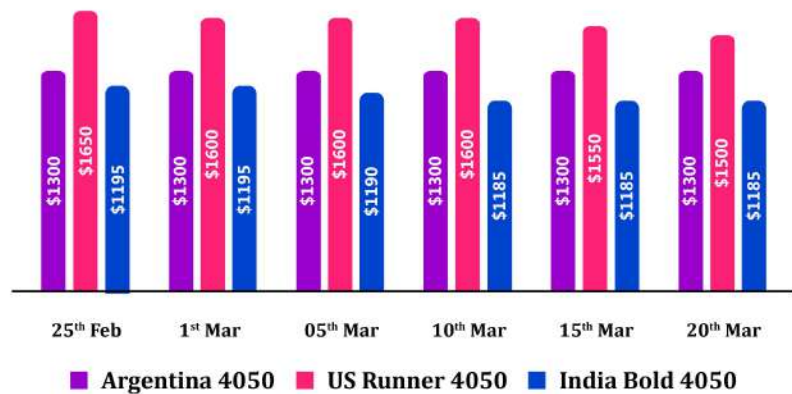
## Global Peanut Oil Imports and Exports



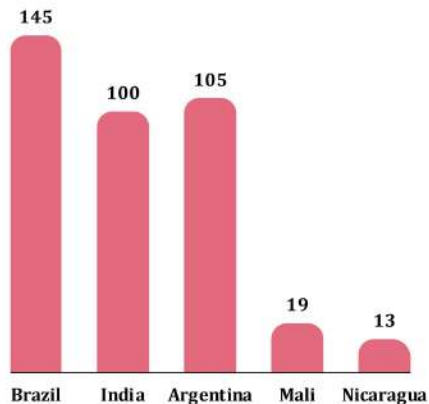
## Peanut Price Trend Feb - Mar 25



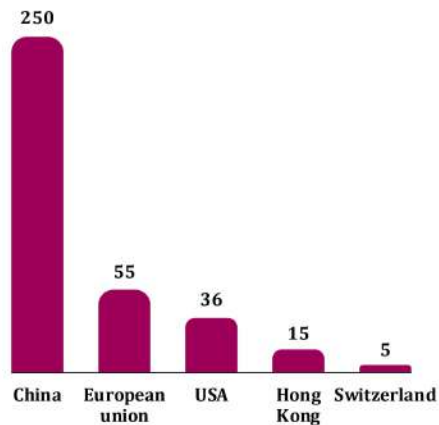
## C&F Price Trends at European Main Ports (EMP)



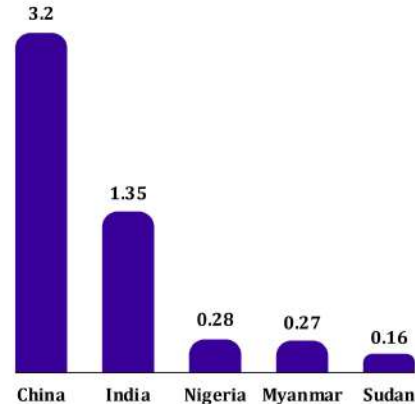
## Major Exporters (In '000 tons)



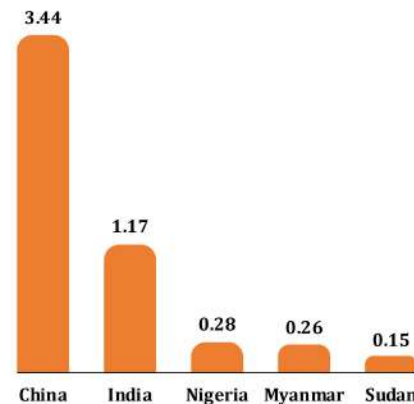
## Major Importers (In '000 tons)



## Major Producers (In MMT)



## Major Consumers (In MMT)





# Current Crops

## PEANUT VOICE

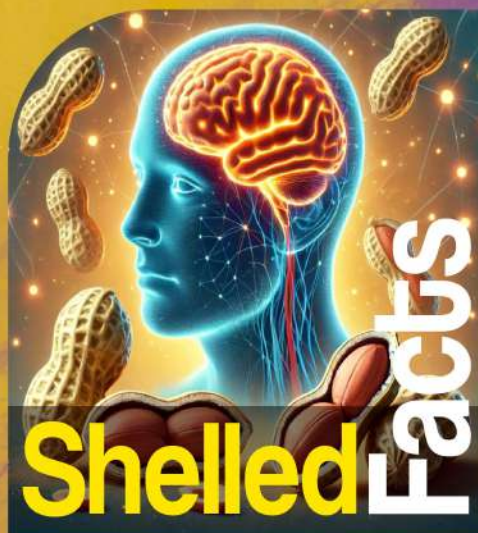
“With 16 years in agri business across 10+ African countries, I was appointed CEO in June 2024 by Senegal's newly elected President to lead the leading agribusiness company in the country, specializing in peanut processing.”



**Mr. Elhadji Ndane DIAGNE**  
Managing Director  
SONACOS SA

**Do you see AI (artificial intelligence) taking over the peanut farming?**

Peanut research and farmers in China, USA, and South America are using AI tools to improve efficiency, reduce waste, and boost yields, without aiming to replace farmers. Peanut farming in Africa is family-based. Countries like Senegal, Sudan, Nigeria, etc. still practice traditional agriculture. Research in the agronomy sector is not exposed to a futuristic or revolutionary perspective that embraces the functionalities of AI. Hence, AI taking over the peanut farming is at a remote horizon.



### Peanuts and Cognitive Function: Can They Make You Smarter?

Peanuts are more than just a tasty snack—they may also support brain health and cognitive function. Rich in healthy fats, vitamin E, niacin, and resveratrol, peanuts provide essential nutrients that protect brain cells from oxidative stress and inflammation. Studies suggest that regular peanut consumption can improve memory, focus, and mental processing speed.

One key component in peanuts is resveratrol, an antioxidant that has been linked to improved blood flow to the brain, reducing the risk of neurodegenerative diseases like Alzheimer's. Additionally, niacin (vitamin B3) supports brain cell repair and reduces cognitive decline. The combination of protein, healthy fats, and fiber also provides sustained energy, preventing mental fatigue. By incorporating peanuts into a balanced diet, individuals may experience enhanced cognitive function, better memory retention, and long-term brain health.

#### Argentina

Soil moisture has improved well due to heavy rains, boosting expectations for a stronger yield.

ARG 4050 \$1300 ▼

#### Brazil

Harvest 35-40% complete initial; high yields are declining and dry conditions remain a concern.

BRZ 3842 \$1250 ▼

ARG

BRZ

CHI

#### China

CHI 4151 \$1340 ▼

#### India

The peanut harvest is in full swing in Tamil Nadu, with larger-sized kernels arriving in the market.

IND 5060J \$1365 ▲

IND

INDO

#### Indonesia

The peanut harvest has just begun, but the crop remains wet due to heavy rains.

INDO 8090 \$1360 ▲

#### South Africa

Harvesting will begin after Easter, with expectations of a good yield and larger peanut counts than last season.

RSA \$NA

RSA

SUD

#### Sudan

SUD 8090 \$950 ▲

#### U.S.A

USA 3842 \$1620 ▼

U.S.A

TAN

#### Tanzania

Crop will be harvested in April.

TAN 8090 \$NA



# SUSTAINABILITY



## How Rainforest Alliance Certified Peanuts Help Combat Climate Change

Climate change is a critical global issue, and agriculture plays a key role in both its cause and mitigation. Rainforest Alliance Certified peanuts promote sustainable farming, reducing the agricultural carbon footprint while conserving natural resources for a resilient future.



### Sustainable Farming Practices

Certified peanut farms adopt eco-friendly methods to lower greenhouse gas emissions and prevent deforestation

#### Agroforestry

Integrating peanut farming with windbreaks or shelterbelts along the edges of farms helps absorb carbon dioxide, prevent soil erosion, and enhance biodiversity without shading crops.

#### Soil Conservation

Crop rotation and cover cropping improve soil health, enhance carbon sequestration, and reduce soil degradation caused by monoculture farming.

#### Reduced Chemical Use

Minimizing synthetic fertilizers and pesticides lowers emissions, protects ecosystems, and prevents chemical runoff that can contaminate water sources.

#### Composting and Organic Amendments

Utilizing organic matter as fertilizers enriches the soil, reduces reliance on chemical inputs, and contributes to carbon sequestration in the soil.

### Water Conservation and Climate Resilience

Sustainable peanut farms focus on water efficiency to combat climate change effects

#### Efficient Irrigation

Drip irrigation minimizes water wastage and energy use by delivering water directly to the plant roots.

#### Rainwater Harvesting

Collecting rainwater ensures a sustainable supply and reduces dependence on groundwater, which is increasingly scarce due to climate change.

#### Drought-Resistant Varieties

Climate-adapted peanut strains maintain stable yields with fewer resources, ensuring food security in water-stressed regions.

### Protecting Biodiversity and Ecosystems

Biodiversity supports climate stability, and certification promotes habitat preservation

#### Pollinator Protection

Safeguarding bees and other pollinators ensures healthy crop yields, which is essential for maintaining balanced ecosystems.

#### Deforestation Prevention

Protecting forests preserves carbon storage and reduces emissions, helping mitigate climate change.

#### Ecological Balance

Supporting diverse species strengthens ecosystem resilience to climate challenges and enhances pest control through natural predators.



# BIRD FEED



## Crafting the Perfect Bird Seed Blend: Why Peanuts Are a Must-Have Ingredient

Bird feeding is a popular and rewarding activity that helps support local bird populations. While many seed mixes include common ingredients like sunflower seeds, corn, and millet, peanuts are an unmissable ingredient that stands out as a powerhouse food source for birds. Packed with protein, healthy fats, and essential nutrients, peanuts provide birds with the energy they need to thrive. Whether whole, shelled, or crushed, peanuts attract a wide variety of backyard birds and enhance any bird seed mix.

### Why Peanuts Are Essential in Bird Seed Mixes

- **Rich in Protein and Healthy Fats** – Peanuts contain high levels of protein necessary for growth and muscle development, while their healthy fats provide sustained energy, especially during colder seasons.
- **Loaded with Essential Nutrients** – Peanuts are a natural source of Vitamin E, B-complex vitamins, magnesium, and phosphorus, all of which contribute to birds' overall well-being and feather health.
- **Helps Birds Thrive in Winter** – In colder months, birds require more energy to stay warm, and peanuts provide the necessary calories to support their survival.

### Attracts a Wide Range of Birds

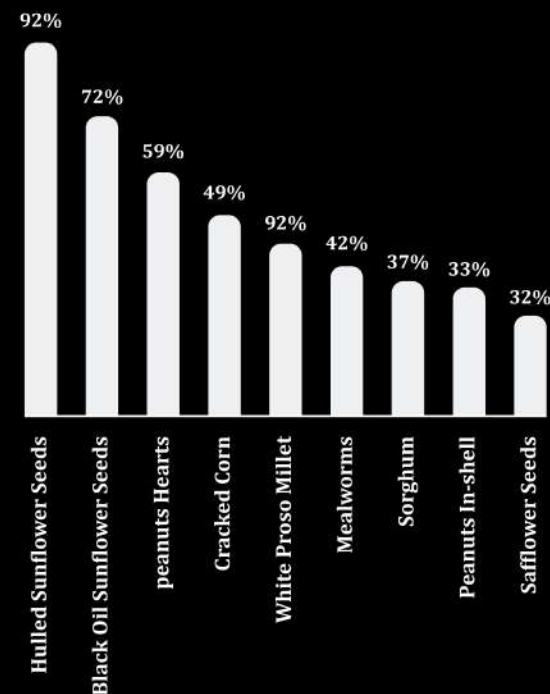
Many bird species love peanuts, including woodpeckers, blue jays, titmice, chickadees, and nuthatches. Whether whole, shelled, or in pieces, peanuts encourage these birds to visit your feeders regularly.

Peanuts are a favourite food among many bird species. Some common visitors in-

- **Blue Jays** – Enthusiastic about whole peanuts, often seen carrying them away for storage.
- **Woodpeckers** – Enjoy peanut pieces, often found pecking at peanut-filled suet feeders.
- **Chickadees and Nuthatches** – Skilled at extracting peanuts from feeders and storing them for later.
- **Titmice** – Known to grip peanuts with their feet while breaking them apart.
- **Cardinals and Finches** – Prefer chopped or crushed peanuts mixed with other seeds.

Peanuts ranked among the top three in an experiment conducted in North America, with 59% of 98 bird species visiting and consuming them.

### Percentage of Birds Visiting Feeders That Eat Different Seeds



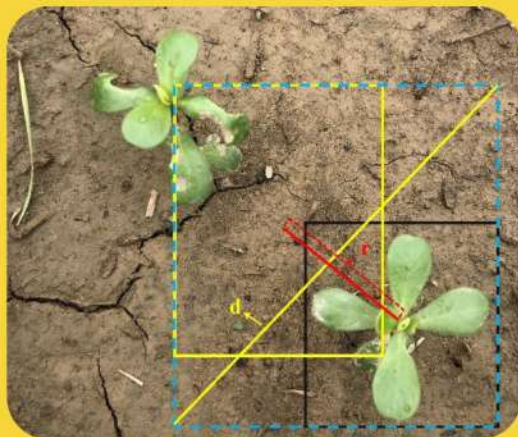


# PEANUT SCIENCE

## Advancing Peanut Farming with Machine Vision for Weed Detection

Weed management is essential in peanut farming, as uncontrolled weed growth competes with crops for nutrients, reduces yields, and promotes disease and pest infestations. Conventional methods, such as herbicide spraying, often lead to excessive pesticide use, environmental pollution, and increased costs. To address these challenges, machine vision-based weed detection offers a precise and efficient solution.

This study presents EM-YOLOv4-Tiny, an improved weed detection model based on YOLOv4-Tiny, designed for accurate weed identification in peanut fields.



**Citation:** Hui Zhang, Zhi Wang, Yufeng Guo, Ye Ma, Wenkai Cao, Dexin Chen, Shangbin Yang and Rui Gao. Weed Detection in Peanut Fields Based on Machine Vision. Agriculture 2022, 12(10), 1541; <https://doi.org/10.3390/agriculture12101541>

**Key Features of EM-YOLOv4-Tiny** The model integrates advanced techniques for improved weed detection:

**Efficient Channel Attention (ECA) Module**  
Enhances feature extraction, particularly for small weeds, by improving the model's ability to differentiate between weeds and peanut plants.

**Soft Non-Maximum Suppression (Soft-NMS)**  
Optimizes bounding box selection, reducing errors caused by overlapping detection frames and preventing false negatives.

**Complete Intersection over Union (CIoU) Loss Function**

Improves localization accuracy and accelerates model convergence, enabling more precise detection of weeds.

**Multiscale Detection Mechanism**

Ensures reliable identification of weeds of different sizes under diverse field conditions, improving adaptability to real-world agricultural settings.

**Compact and Efficient Design**

With a lightweight 28.7 MB architecture, the model is highly suitable for embedded agricultural systems and smart farming applications.

**Performance and Practical Applications**

Experimental results indicate that EM-YOLOv4-Tiny achieves an impressive mAP of 94.54%. The model can process a single image in 10.4 milliseconds, making it highly effective for real-time weed detection in peanut fields. These improvements enable practical deployment in agricultural machinery, including autonomous weeding robots and drone-based monitoring systems.

By reducing herbicide reliance, the model promotes sustainable farming, lowers costs, and enhances precision weed management. It can also be adapted for mobile applications, giving farmers real-time insights for better decision-making.

**Future Directions**

Future research will focus on integrating EM-YOLOv4-Tiny into autonomous weeding robots and improving adaptability to various environmental conditions. By combining AI, machine vision, and automation, this technology advances sustainable and efficient weed control, shaping the future of smart agriculture.



# CONTRIBUTOR SPOTLIGHT

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QingDao FuShuai Oil



## UPCOMING EVENTS



**International  
Peanut Forum**  
2025

**April 9-11, 2025**

**📍 Barcelo Sevilla Renacimiento, Spain**

