PEANUT POST

MAY 2025
93
VOLUME

MARKET WIZARD

THE PEANUT TRADE SHOW:

- TARIFF TWISTS
- SUPPLY CHAIN SHIFTS
- MARKET SHAKEOUTS

PRE-TARIFF PEANUT SOURCE	REGION	POST TARIFF REALIGNMENTS
• 90% from US • 10% from China | Argentina		• 25% Tariff on US • Shifted to: Argentina @$1300 | China @$1400
• 100K tons Inshell from US @$800/ton CIF		Shifted to: • India @$850 • Avoided US@$1800 (post tariff)
• 60% from Argentina • 40% from US | China | Brazil | Nicaragua | India		Shifting to: • Brazil @$1300 • India @$1200
• 88% from US		• To import more peanuts at lower price points
• Exports 83% to EU		• Larger crop enables duty-free supply to EU and Canada
• Exports 90% to Russia | Algeria | South Africa		• Cautiously expanding to EU & Canada amid high aflatoxin
• Exports 95% to SEA		• Gaining China and EU share @$850 and @$1200 respectively
• Global Supplier		Strengthening partnerships: • Argentina, Brazil, India, Senegal & Sudan
Exports: • 27% to Mexico • 21% to Canada • 21% to China • 20% to EU		• Potential loss of export volume by 62%

Canada

- Before Canada's 25% tariff, 90% of imports came from the U.S.
- U.S. Runner 38/42 now at $1,800/ton.
- Canada shifts to Argentina ($1,300/ton) and China ($1,400/ton) for better pricing.

Argentina & Brazil

- Argentina ($1,300/ton) and Brazil ($1,300/ton) replace U.S. peanuts due to strong harvests and low prices.
- Argentina ships 83% to the EU and expands to Canada.
- Argentina and Brazil undercut U.S. prices by $200/ton, boosting global share.

China

- China previously imported 0.1 MMT of U.S. premium peanuts at $800/ton CIF Qingdao.
- A 125% tariff raised prices to $1,800/ton. Importers pivoted to India ($730/ton) with a 15% tariff.
- China aims to boost local production to reduce reliance on imports and avoid future trade disruptions.

Mexico

- Mexico accounts for 27% of U.S. peanut exports and may take more as Canada, China, and the EU impose tariffs.
- With no retaliatory duties, Mexico is becoming a key outlet for excess U.S. supply in a changing global trade landscape.

China

- China is becoming a key peanut exporter, targeting the EU and Canada.
- Blanched peanuts priced at $1,340/ton FOB, much cheaper than U.S. at $2,200/ton post-tariff.
- China's price edge makes it a go-to supplier for cost-sensitive markets.

USA

- Major exporter with key shares in Mexico (27%), Canada (24%), China (21%), and the EU (20%) faces setbacks from U.S. tariffs.
- Canada and EU retaliated with a 25% tariff; China imposed 125%.
- Mexico hasn't retaliated yet.
- U.S. exports will be impacted, requiring a shift to Mexico or Southeast Asia.

European Union

- The EU gets 60% of its peanuts from Argentina, plus imports from China, U.S., and Brazil.
- A proposed 25% EU duty on U.S. peanuts could raise costs to $1,970/ton, risking $135M in U.S. exports.
- India offers peanuts at $1,200/ton.
- Argentina, already supplying 83% of the EU's peanuts, stands to gain more market share.

Global Markets

ARGENTINA

Private and public sources from the peanut sector concur in estimating that approximately 500,000 hectares have been planted for the 2024/2025 peanut crop, marking a historic record. Projected production ranges between 1.60 and 1.72 million metric tons of in-shell peanuts.

According to Georgalos Peanut World, with around 500,000 hectares under cultivation and an estimated yield of 3.6 metric tons per hectare, total production could reach 1.80 million metric tons of in-shell peanuts.

Following a 2024/25 season characterized by high production and limited returns, processors are expected to reduce the per-hectare rent paid to producers, aligning rates more closely with historical averages and significantly lower than the elevated levels offered during the 2024/25 marketing year.

Given the high input costs and depressed market prices, there is widespread concern that many producers may opt out of peanut cultivation in the upcoming season.

BRAZIL

The new peanut crop harvest in Brazil is nearly complete, with mixed results. In São Paulo—producing 80% of the crop—95% of the harvest is done. Although early signs pointed to a record crop and volumes were good overall, the final third showed weaker yields and aflatoxin issues. Demand remains sluggish, keeping prices low. However, exports of peanuts and peanut oil are increasing as shellers and crushers begin shipping. Brazil also sold older, lower-quality crushing stock to China, clearing previous season inventory.

USA

The USDA forecasts peanut production for MY 2024/25 at 3,224,000 short tons, a 9.7% increase over MY 2023/24. Harvested acreage is stable at 1.8 million acres, with a 200,000-acre increase mainly in Georgia, Texas, and Alabama. Ending stocks are estimated at 824,000 short tons. For MY 2025/26, farmers plan to plant 1.95 million acres, a 149,000-acre increase, with Georgia, Florida, and Texas leading the growth. This would be the highest peanut acreage since MY 1991/92.

PEANUT SPOTLIGHT

INDIA

GUJARAT

In Junagadh, about 30–40% stock remains, with Java variety nearly finished. Pathavada stock is very limited; farmers have almost no stock left. Demand is slow as factories are shut and rate parity is missing. Government auctions continue, with approvals above 51 outturn, averaging around 70, despite mixed quality. Around 4809 hectares have been sown. New arrivals expected from late May.

SOUTHERN REGION

Tamil Nadu's new crop arrivals are 8,000–10,000 bags of kernels daily, but demand remains weak. Karnataka arrivals are almost over, and Andhra's movement is slow. Maharashtra's new crop trades for 50/60 count with high moisture; crop size is 60% of last year. Orissa's crop has started, trading 60/70 count, with 30% crop size compared to last year.

Demand from Indonesia is surging due to challenges in obtaining Certificates of Export (COE) and laboratory certificates. The process has become largely bureaucratic, focusing more on paperwork than genuine quality checks, leading to a near standstill in exports as several labs have been de-listed by regulatory authorities. Until these issues are resolved, the Indonesian market will remain heated while the Indian market continues to soften.

OTHER'S

Indonesia Indonesia's local crop from Central Java is available, with 8090 peanuts priced at 1,460 USD/ton and 5060 at 1,550 USD/ton, excluding VAT (PPN). While the market views these prices as high, some players are capitalising on the situation.

Demand is strong but not reflective of true market needs, driven by COA issues and buyers picking up available stock. With India's last loading on April 21, focus has shifted to incoming FCLs. Despite the arrival of local crops, prices remain high, and uncertainty prompts many to inquire about available or incoming cargo.

Tanzania The new Tanzanian peanut crop is gradually entering the market over the next 1–2 weeks. Early signs point to good quality and strong demand locally and from neighboring African countries. Raw material prices are already above USD 1,000/MT, even without added costs. Market trends suggest this season's prices will remain on the higher side.

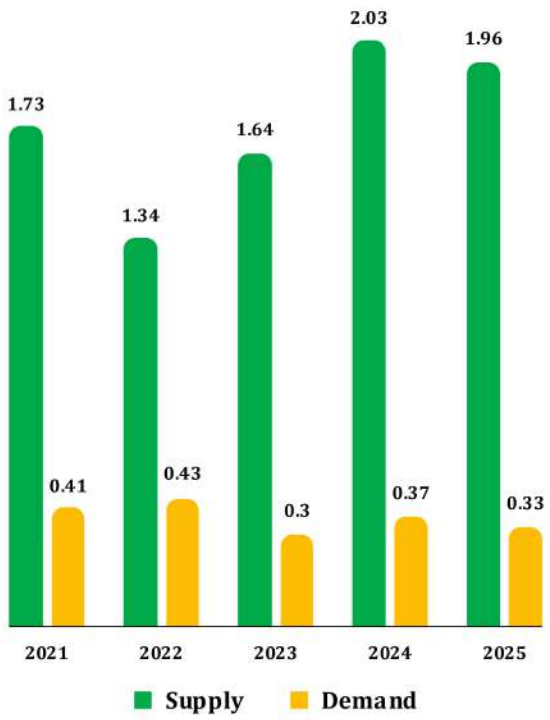
South Africa The South Africa peanut harvest began in the last week of April, following delays caused by heavy rains. While we're hopeful to proceed smoothly from here, the crop may be slightly smaller than initially expected due to damage and lower yields.

CHINA

On the supply side, farming season constraints and hold-and-hedge strategies are limiting availability. Agricultural activities are keeping grassroots supply tight, while intermediaries show mixed behavior—some holding stock, others selling early. Rising temperatures are increasing storage pressure, prompting passive destocking, though structural tightness continues to slow supply release. Blanched 25/29 peanuts are priced at USD 1,260 FOB, and 29/33 at USD 1,250 FOB. On the demand side, strong price resistance persists. Market activity is driven by essential demand, with downstream buyers reluctant to accept higher prices. Procurement remains small and routine, with traders restocking in low-volume, high-frequency patterns, lacking broad momentum. Volume growth depends on real consumption recovery.Circulation is improving slightly, with some intermediaries accelerating sales due to stronger mill prices, though focus remains on current orders. Sudanese peanuts are trading at USD 1,140/MT in Huangdao Port, and first-grade peanut oil averages USD 2,060/MT. Oil mills are cautiously optimistic, slightly increasing procurement prices and easing quality standards, offering short-term price support.

ARGENTINA PEANUT DEMAND & SUPPLY

Total Supply Vs Domestic Demand (in MMT)



Insights

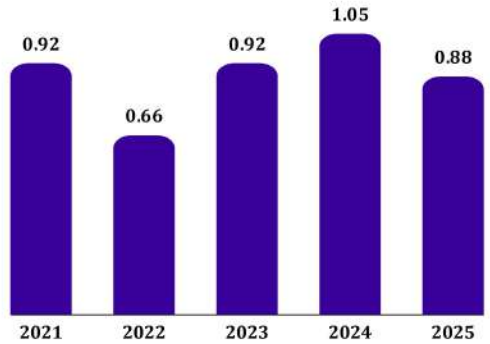
Argentina's Peanut Production Set to Fall as Growers Shift Amid Price Slump

Argentina's peanut production is expected to drop sharply in MY2025/26 due to falling prices, high stocks, and reduced profitability. Lower processor rents and better returns from crops like soybeans and corn are discouraging planting, especially among first-time growers disillusioned by poor returns in the previous season.

Argentina's Peanut Exports Set to Decline

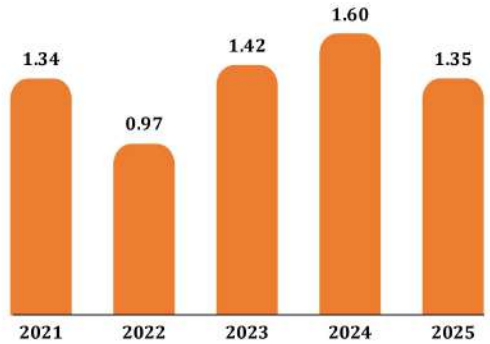
Argentina's peanut exports are forecast to decline in MY2025/26 due to reduced production, previously exported high stocks, and a stronger peso affecting competitiveness. While EU demand for Argentina's premium-quality peanuts remains strong, competitors like Brazil and India are capitalizing on tariff changes to offer lower-priced alternatives and replace U.S. peanuts.

MY Exports (in MMT)

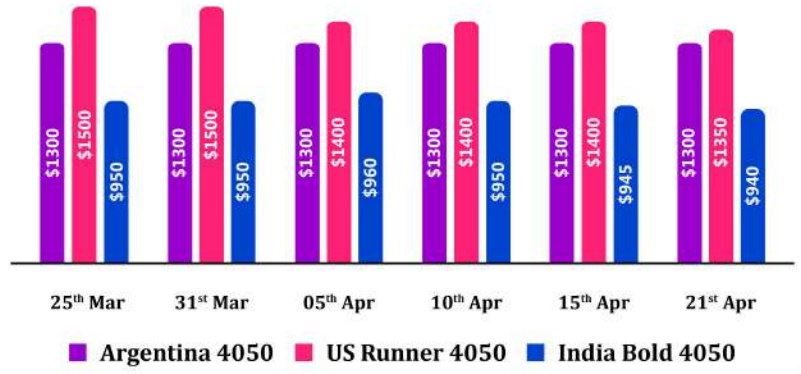


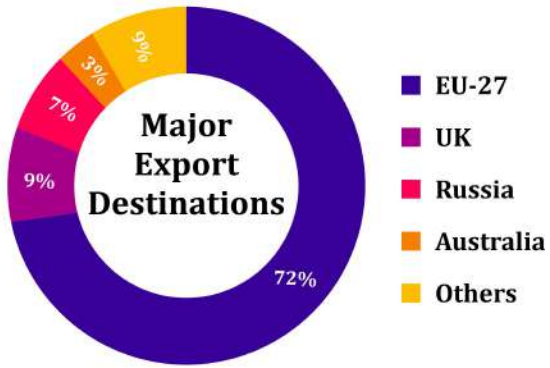
Peanut Price Trend Mar - Apr 25

Total Production (in MMT)



FOB Price





Current Crops

ARG 4050 $1300 ▼ — ARG — **Argentina**

As of April 25, 2025, 60% of Argentina's peanut crop has been dug, but only 5% has been harvested.

Brazil — BRZ — **BRZ 3842 $1300** ▲

New crop harvest is approaching its final stages.

CHI 4151 $1310 ▼ — CHI — **China**

India — IND — **IND 5060J $1260** ▼

Gujarat Java new crop arrivals are expected by end-May, with regular movement from early June.

INDO 8090 $1460 ▲ — INDO — **Indonesia**

Harvesting of the local crop in Central Java, Indonesia, is now underway.

South Africa — RSA — **RSA sNA**

Peanut harvest starts, with lower yields to be expected.

USA 3842 $1575 ▼ — U.S.A — **U.S.A**

Tanzania — TAN — **TAN 8090 $1000** ▼

The new crop is gradually entering the market and showing good quality.

MOZ sNA — MOZ — **Mozambique**

The new crop from Mozambique, had arrived to the market.

PEANUT VOICE

"We operate a large grading factory in this region, located in the Dongbei area. The main peanut varieties here are Baisha and 9616, which we supply to both local buyers and export companies."

Mr. Zhang LiMin
Manager
FuYu FengYuan Food

Which country do you foresee will be a leading net supplier of the peanut produce after 10 years?

China is expected to remain the world's main supplier, as the country is exploring far-west regions such as Xinjiang and Inner Mongolia for peanut cultivation. India also has strong peanut production with good volumes. In Africa, countries like Senegal and Sudan are key producers. Additionally, Argentina and Brazil both have the potential to become major suppliers. The United States also produces a good volume of peanuts, but ongoing trade tensions initiated by the U.S. have introduced uncertainty to their export outlook.

From Peanut Shells to Plates: Innovating Sustainable Dining

Peanut shells, often discarded as waste, are finding a second life as eco-friendly, biodegradable plates. Rich in natural fiber and lignin, these tough shells can be ground into a fine powder and molded into sturdy tableware using natural binders like starch or resin. The result? Compostable, plastic-free plates that break down naturally and help reduce landfill waste. This innovative reuse not only minimizes environmental impact but also adds value to agricultural by-products. Perfect for sustainable events and green-conscious brands, peanut shell plates are part of a growing global trend toward circular design and zero-waste living. By turning a simple shell into something both functional and earth-friendly, the humble peanut proves once again that nothing in nature needs to go to waste.

SUSTAINABILITY

#Peanut 360

Eco-Feeding with Peanut Straw: Turning Harvest Leftovers into Sustainable Livestock Nutrition

When we think of peanuts, most of us picture the familiar nut — roasted, boiled, or crushed into peanut butter. But what happens to the rest of the peanut plant after harvesting? Surprisingly, that leftover material, known as peanut straw, is gaining attention as a sustainable and affordable solution for livestock nutrition.

What Is Peanut Straw?

Peanut straw is the plant residue mainly stems and leaves left behind after peanuts are harvested from the ground. For years, this material was either burned in fields or left to decompose, often seen as useless waste. But times are changing. Farmers and researchers are now recognizing the untapped potential of peanut straw, especially in livestock feeding systems.

Why It Matters

In many parts of the world, livestock farmers face challenges like rising feed costs and seasonal shortages of green fodder. Peanut straw offers a smart alternative it's already available on farms, it's low-cost, and when used correctly, it can help support the health and nutrition of animals like cows, goats, and sheep.

Nutritional Value

Peanut straw is rich in fiber and contains moderate levels of crude protein, making it a useful roughage component in cattle diets. When supplemented with protein-rich feed, peanut straw contributes to healthy digestion and improved weight maintenance in ruminants like cows, goats, and sheep.

Big Impact

Peanut straw may seem like a simple leftover from the harvest, but it holds powerful potential to reshape the way we think about livestock feeding. It's sustainable, cost-effective, and right at farmers' fingertips. By using peanut straw as feed, farmers are not only improving animal nutrition — they're also helping create a greener, smarter future for agriculture.

The Sustainability Advantage

Feeding livestock with peanut straw isn't just good for the animals — it's good for the planet, too. Here's how:

Reduces farm waste: Instead of burning or discarding, the leftover plant is put to good use.

Cuts greenhouse gas emissions: No burning means cleaner air and healthier soil.

Supports circular farming: Every part of the crop is used, creating a more sustainable farm system.

Lowers feed costs: Farmers save money by using what they already grow.

Incorporating peanut straw into feeding systems supports climate-smart agriculture and reduces the environmental footprint of farming.

BIRD FEED

Top Commercial Peanut Varieties for High-Quality Bird Feed

Not all peanuts are the same each grade brings its own value to the feeder. From size and texture to how birds interact with them, every type offers something unique. Whether it's whole peanuts for the bold beak or chopped pieces for the quick snackers, choosing the right grade can elevate any bird feed mix from basic to irresistible.

Raw Kernels 60/70

These medium-sized whole peanuts (60–70 nuts per pound) are a top choice for feeders, offering the perfect balance of size and nutrition. Ideal for species like jays and woodpeckers, they're a key ingredient in premium wild bird mixes, attracting both larger birds and those who enjoy a hearty snack.

Raw Splits 100%

Pure peanut halves, unroasted and unsalted. These retain natural oils and nutrients, offering a premium, clean ingredient for quality-focused feed products. Perfect for high-energy blends, especially in colder months when birds need an extra boost.

Raw Kernels 50/60

These slightly larger whole peanuts (50–60 nuts per pound) strike the perfect balance between small and large kernels. Ideal for medium to large birds like woodpeckers, jays, and nuthatches, they offer a satisfying crunch without being too big. Versatile and nutritious, they're great for standalone feeding or blending with other seeds to attract a variety of bird species.

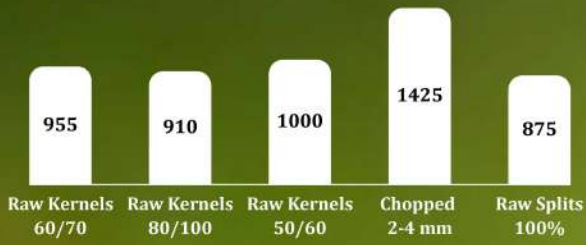
Raw Kernels 80/100

These smaller whole peanuts (80–100 nuts per pound) are perfect for medium-sized birds like finches and chickadees. Their bite-sized nature makes them ideal for high-traffic feeders, reducing mess while providing a quick, light snack. Great for blends or feeding alone.

Chopped Peanuts

Convenience meets accessibility. Chopped peanuts are perfect for attracting a wide range of birds, from finches to robins, and are especially useful in high-traffic feeding areas. Easy to mix, easy to eat—ideal for suet, seed cakes, or loose feed.

India Origin Peanut for Bird Feed FOB Price Comparison in USD



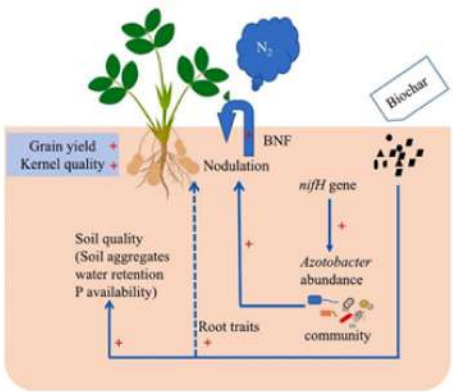
Why These Options Work in Commercial Bird Feed

- Each type suits a specific bird size and feeding style
- Easy to blend with seeds, suet, and other ingredients
- Long shelf life and high energy density
- Loved by a wide variety of species year-round

Whether you're formulating your own feed mix or stocking up for retail, these commercial peanut options ensure you're offering birds what they truly love and what keeps customers coming back for more.

PEANUT SCIENCE

Advancing High-Oleic Peanut Farming in Drought-Stressed Soils Through Biochar Amendment



Field Evidence of Biochar Benefits in Semi-Arid Peanut Cultivation

High-oleic peanuts are in high demand, but growing them in sandy, drought-prone soils is a challenge. These tough conditions often restrict root growth, nutrient absorption, and oil quality. Enter biochar—a carbon-rich material made by heating crop residues or animal waste in low-oxygen conditions. In a recent field study from semi-arid Central China, biochar proved to be a game-changer. By enriching the soil, boosting moisture retention, and encouraging microbial activity, it not only improved peanut yield but also upgraded the oil quality, showing immense promise for sustainable agriculture in harsh environments.

Impact of Biochar on Soil Phosphorus, Root Biomass, and Oilseed Quality in Peanut Cultivation

One of the standout findings from the study was that biochar significantly increased the availability of phosphorus in the soil—by approximately 15% across all treatments. This enhancement in soil nutrition played a crucial role in promoting robust root development, with root growth improving by over 80% in biochar-treated plots. The resulting plants were healthier and more efficient in absorbing water and nutrients, even under drought stress conditions.

These below-ground benefits translated directly into above-ground gains. Peanut yields increased notably, while the quality of the oil-rich seeds improved significantly. All biochar treatments enhanced oilseed quality by 10–25%, and, most notably, boosted the proportion of oleic acid by up to 70%—a major improvement for both nutritional value and commercial appeal.

Biochar's Microbial Advantage

Biochar didn't just help the plants—it helped the microbes too. It supported the growth of beneficial nitrogen-fixing bacteria known as diazotrophs. These microbes naturally convert nitrogen from the air into forms that peanuts can use, reducing the need for chemical fertilizers. With enhanced biological nitrogen fixation (BNF), peanut protein content also saw a positive bump, thanks to increased rhizobial activity in the root zone.

Biochar's Promise for Drylands

For farmers working in nutrient-poor, dryland soils, biochar offers a sustainable, eco-friendly solution. By recycling agricultural waste into a soil enhancer, it supports better yields, reduces the need for synthetic inputs, and boosts the quality of high-value crops like high-oleic peanuts.

Citation: Cheng Liu, Jing Tian, Lei Chen, Qunling He, Xiaoyu Liu, Rongjun Bian , Jufeng Zheng, Kun Cheng, Shaopan Xia, Xuhui Zhang, Jihua Wu, Lianqing Li, Stephen Joseph, Genxing Pan. https://doi.org/10.1016/j.scitotenv.2024.173061

CONTRIBUTOR SPOTLIGHT

Mr.Arun Adhidya
Branch Manager
Agrocrops

Mr. Andres Geogalos
DIRECTOR
Georgalos Peanut World

Mr. Manoj
Sales Analyst
Agrocrops

Mr. Ravirajsinh Zala
Purchase Manager
Agrocrops

Mr. Jorge Rocha
Sales Manager
Samtraco

Mr. Chen Xi Bing
Manager
QingDao FuShuai Oil

UPCOMING EVENTS

Warsaw FOOD Expo

May 20-22, 2025

Nadarzyn, Poland