



MARIE GHIGHTS

SUPPLY



India

remains Indian supply uncompetitive due to elevated MSPs, though strong domestic demand continues to support higher price levels. Farmer arrivals have dropped sharply following 30-40% crop losses during the summer harvest due to adverse weather. Southern markets are experiencing notable stock shortages, with old Winter 2024 stocks making up the bulk of supply. However, the outlook for the upcoming winter crop in November remains positive.



China

Pick a price and a deal can be struck—provided the demand is sizable. Dealers and factories are eager to offload existing stocks, and oil processors are also liquidating inventory ahead of the upcoming major harvest. However, the next harvest could pose challenges for provinces contributing over 30% of China's total crop. For now, the market remains in a wait-and-watch mode.



Argentina

The abundant 2024 crop continues to sustain the market. Crushing grades are available across a wide price range of \$800-1,000/ ton, while birdfeed grades are trading between \$900-1,000/ton. With around 80% of the new crop harvest now complete, the outlook for the season remains uncertain. Offers for 40/50 grade range from \$1,000 to \$1,050/ton, depending on shipment terms and quality. Availability of 50/60, 60/70, and 70/80 grades is more prominent, as the season has skewed toward smaller sizes.



China

Demand for oilseed crops in China—including peanut, sesame, and sunflower—has sharply declined. Erratic market trends have left Chinese buyers sitting on ample inventories. As a result, they are unwilling to pay more than \$1,520/ton for oil or \$900/ton for crushing-grade peanuts. The upcoming festive season in October may offer clearer market direction.



Indonesia

DEMAND

Imports have dropped to historic lows due to tighter regulations, shrinking demand, and ongoing quality Indian concerns. traders have underperformed on quality while aggressively chasing volumes, leading to a sharp decline in TJ 8090 prices. The market is still moving old crop stock despite the arrival of the new crop. TJ 8090 at \$950/ ton is being overlooked, and anything above \$1,000-1050/ ton for good quality is proving unviable.



Birdfeed

Demand in the birdfeed segment has been partially met through low-quality grades from Brazil and the 2024 Argentine crop, with prices ranging between \$1,000 and \$1,050 per ton. However, there is still ongoing demand in the \$900–1,000/ton range, subject to varying packaging requirements. Looking ahead, the birdfeed (BAF) segment is expected to remain lacklustre, given the substantial carryover stocks at origin.



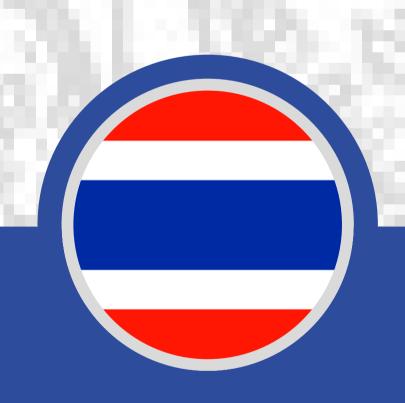
Brazil

Brazil is currently dealing with multiple lots affected by aflatoxin contamination, with several shipments at risk of rejection. Price offers for mixed grades start from \$900/ton, though aflatoxin levels are significantly above acceptable standards. Additionally, there are ongoing concerns over high Free Fatty Acid (FFA) levels in Brazil's crushinggrade peanuts.



Africa

Tanzania and Mozambique are currently out of the market, while Senegal has crop available but at a higher cost. Sudan continues to quote elevated prices due to logistical challenges. With the key African suppliers largely absent from the supply side, the impact has been minimal, as underlying demand remains structurally weak. Senegal's peanut oil is quoted at \$1,650/ton, while Sudanese peanuts are priced around \$1,200/ton.



Thailand

New regulations have been finalized, but quarantine authorities have yet to approve imports. The updated rules require factory certifications and shipper qualifications, which could unlock significant pentup demand from Thailand in the future. However, participation by low-quality shippers may hinder market performance. Currently, there are no reference prices available, as no trades have been concluded.



India

The local Indian market remained relatively stable, with oil prices holding firm amid weather-related disruptions that affected raw material supply to industries. Domestic prices are currently trading at a 10–15% premium over export prices, leading to faster trade cycles. Indicative demand for 50/60 Java is around \$1,350/ton, while oil prices are hovering at \$1,670/ton. Local prices remain notably elevated.

Global peanut prices saw an increase of 7% between the 1980s and 1990s, but have risen only 20% over the past decade. As we look ahead, where do we anticipate prices could trend over the next 10 years?



Insights based on ANOVA Analysis

Variables analyzed: Production | Consumption | Carry-over Stocks | Rainfall

USA

Rainfall seems to be the Among most influential among the four factors on shelled peanut prices, though it is for statistical significance. Production, consumption, and carry over are weakly to possible intervention, on this model policy support, or export shifts.

INDIA

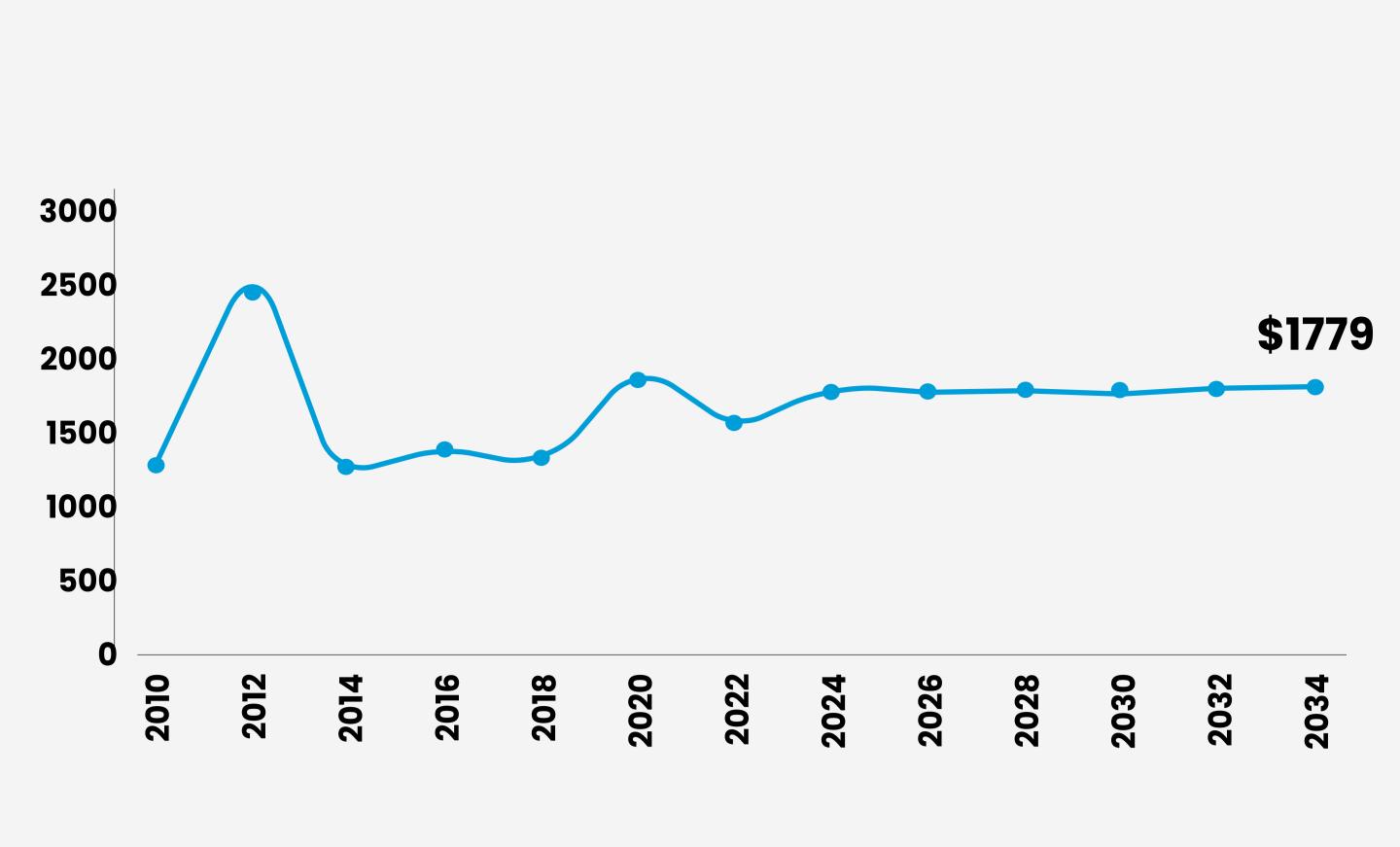
variables, all Consumption is the only factor that significantly influences peanut prices in with stocks playing a just above the 0.05 threshold India (p-value < 0.05). Other secondary role (p < variables like Production, Stocks, and Rainfall do not show strong individual correlated with price due influence on price, based

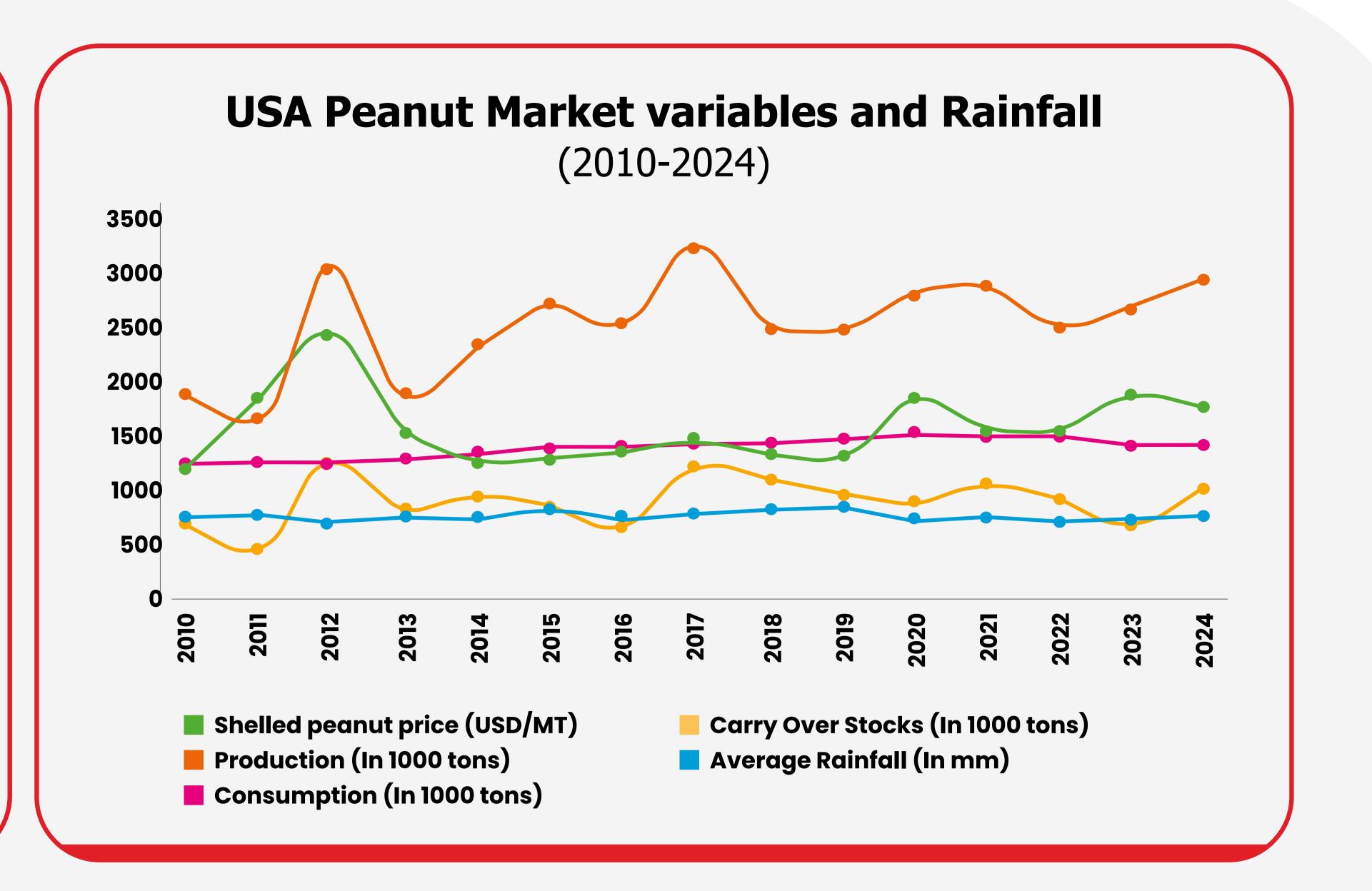
In Argentina, peanut prices are mainly influenced by production and rainfall, 0.01). Consumption has minimal impact on price determination, indicating that supply-side factors are the dominant drivers of market trends in the country.

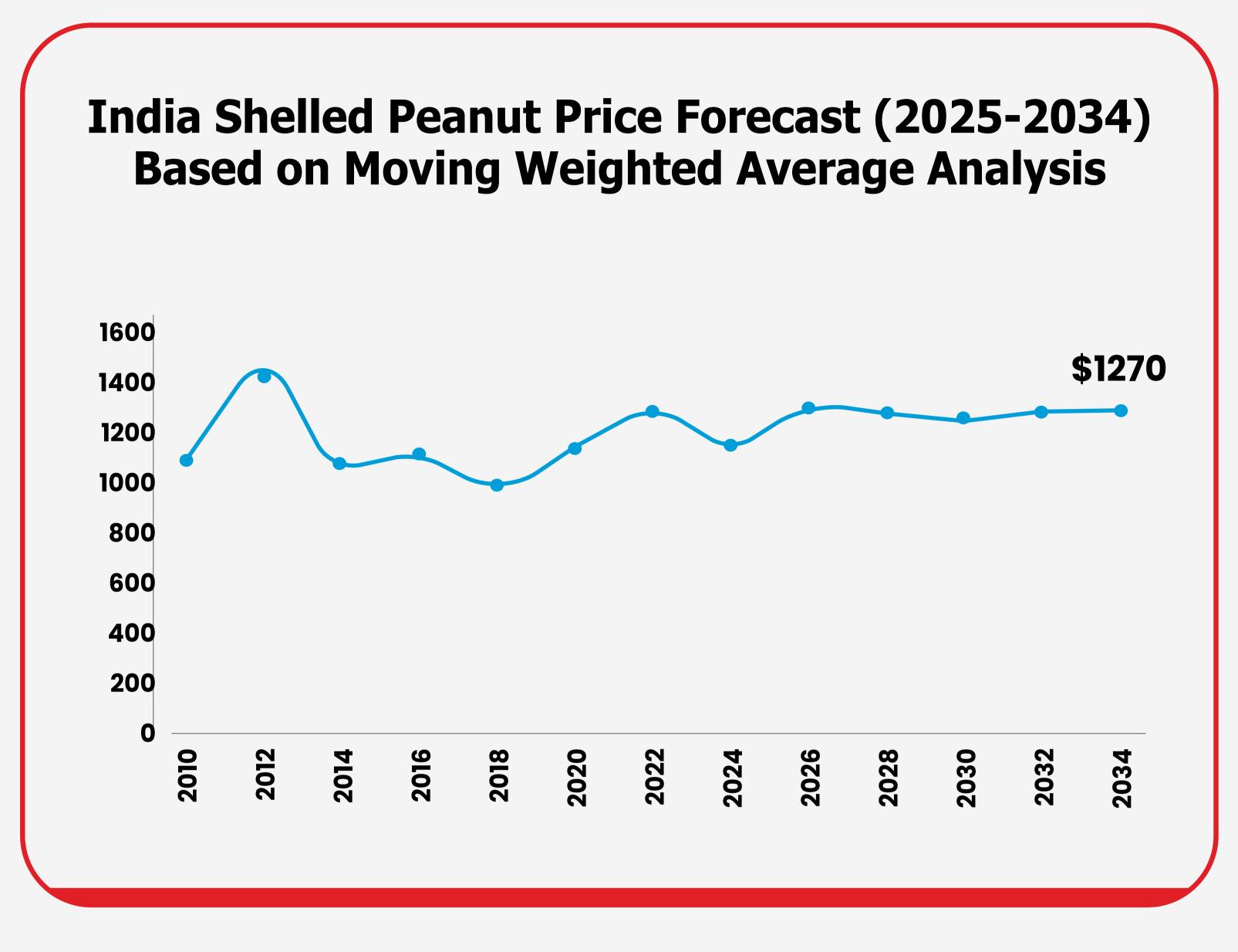
CHINA

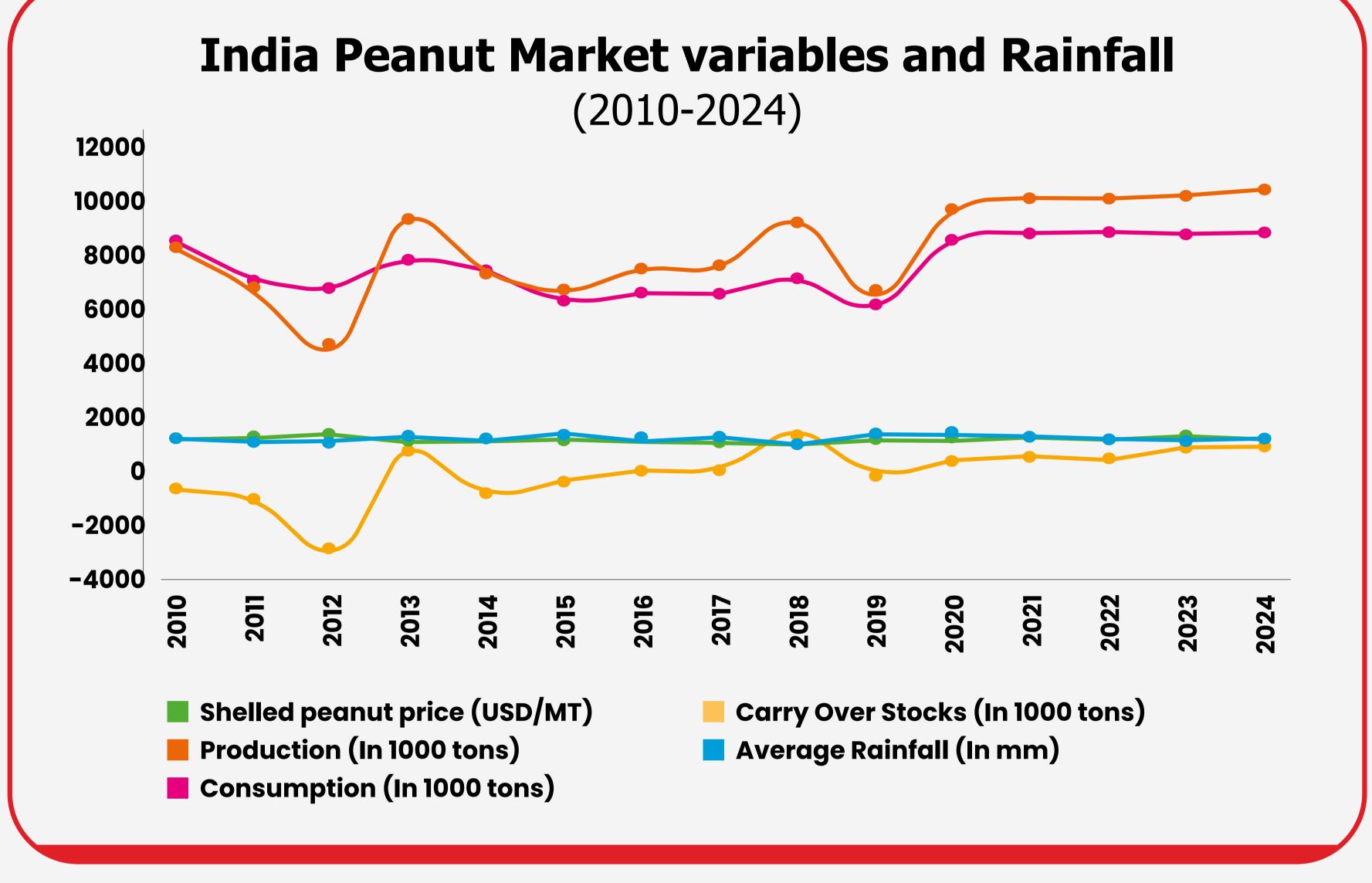
None of the variables Production, Consumption, Stock, or Rainfall—significantly affect peanut prices at the 95% confidence level (p > 0.05). Rainfall shows minimal direct impact, indicating other factors like global trade, policies, or input costs may have greater influence.

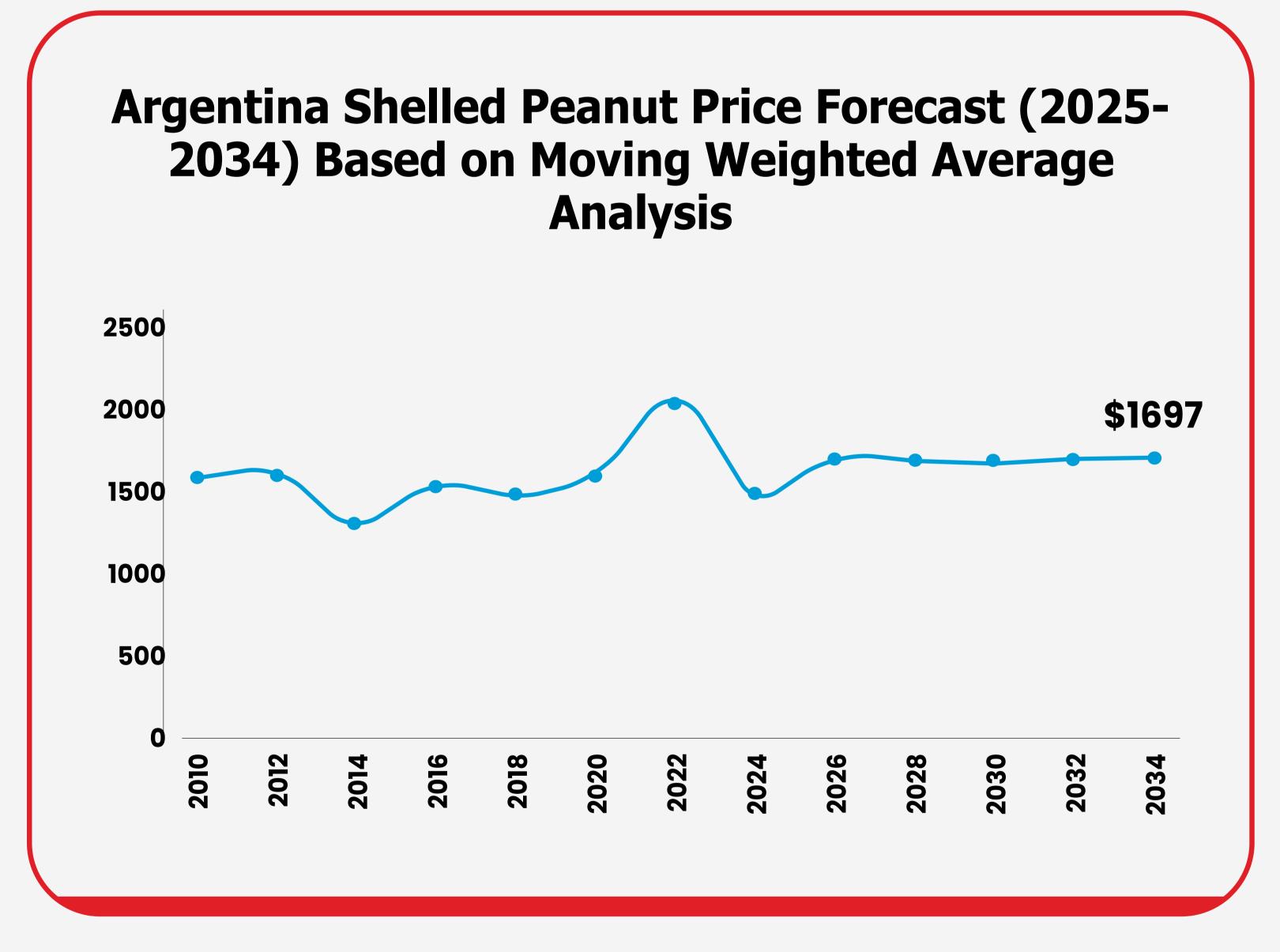
USA Shelled Peanut Price Forecast (2025-2034) Based on Moving Weighted Average Analysis

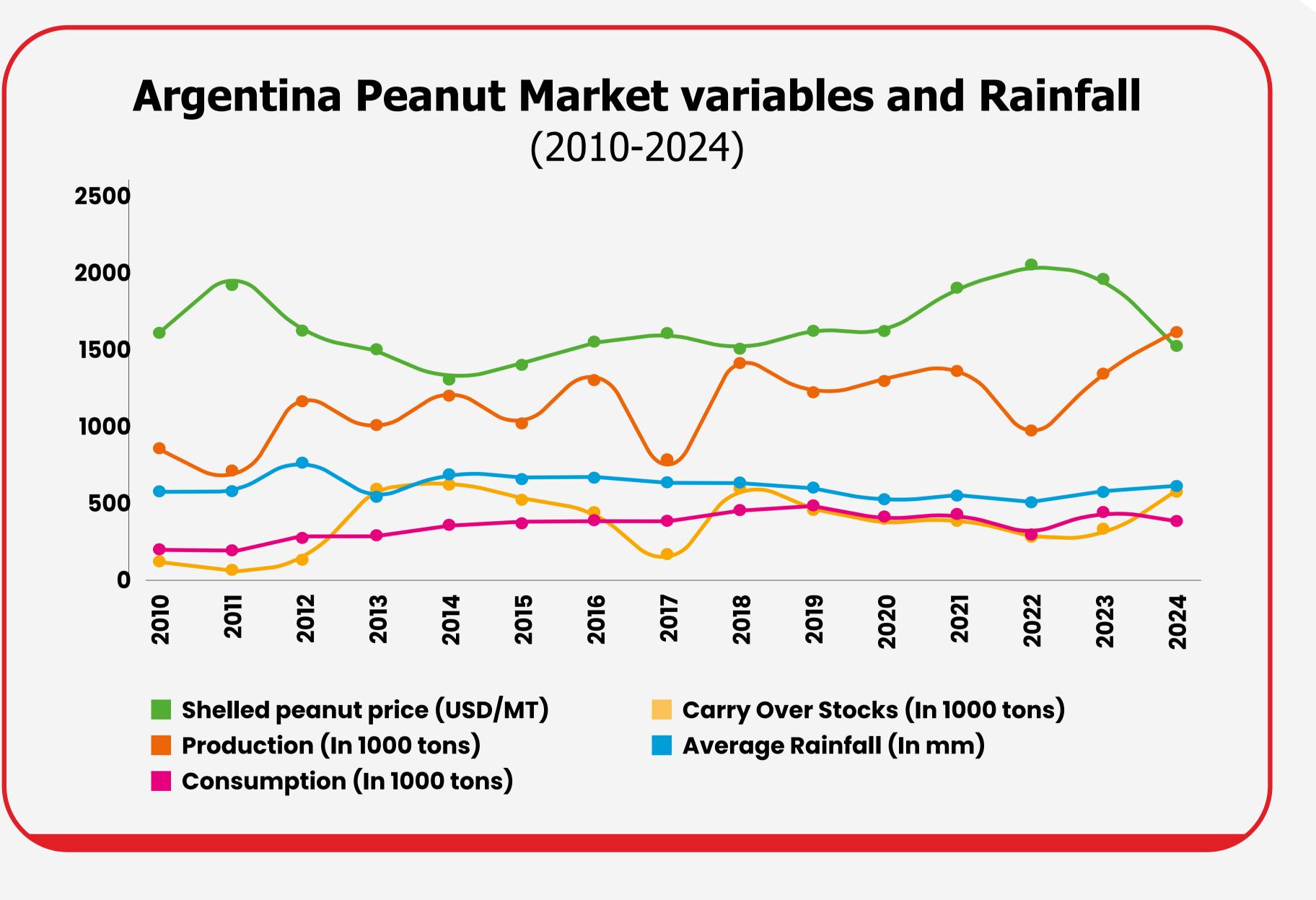


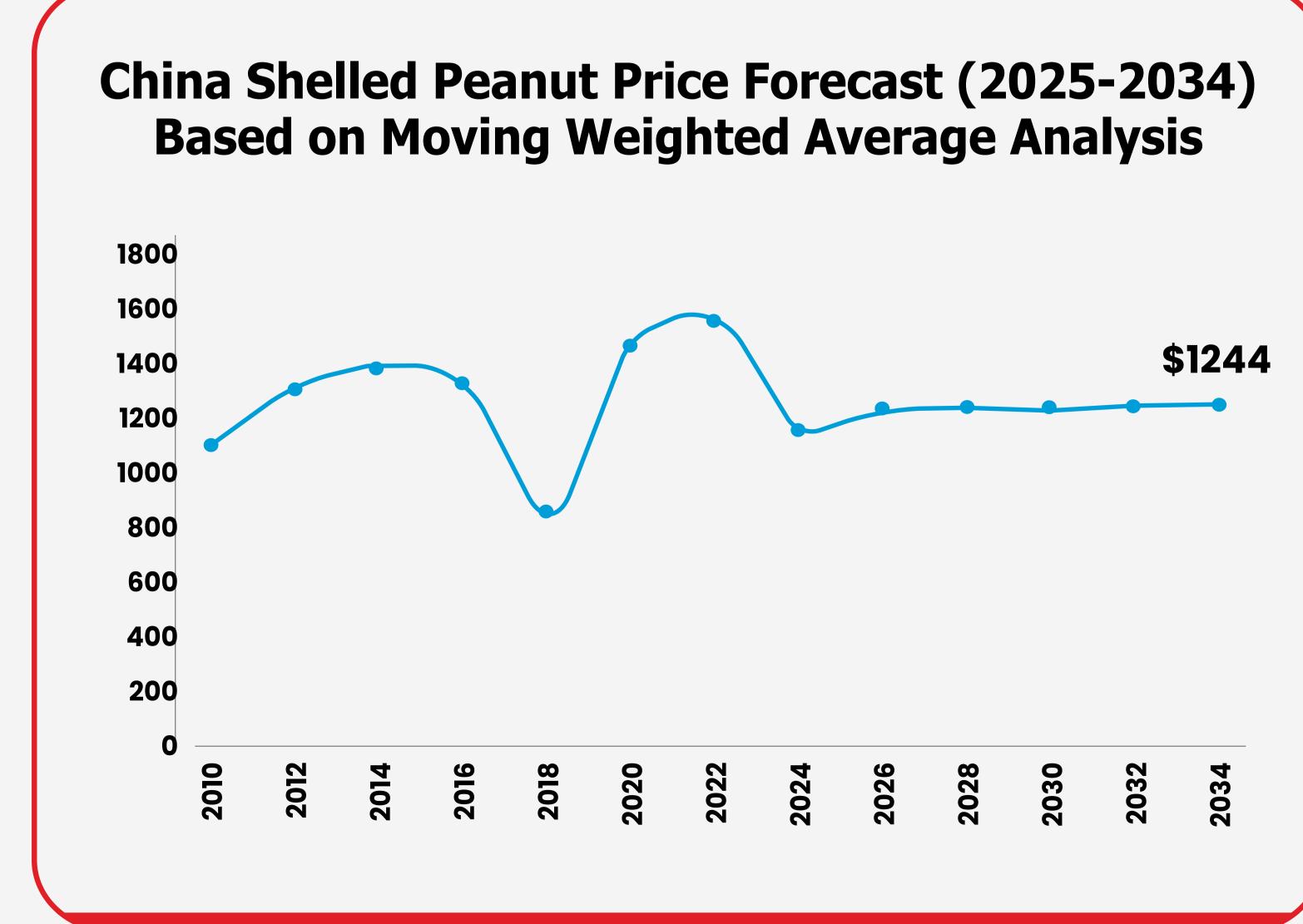


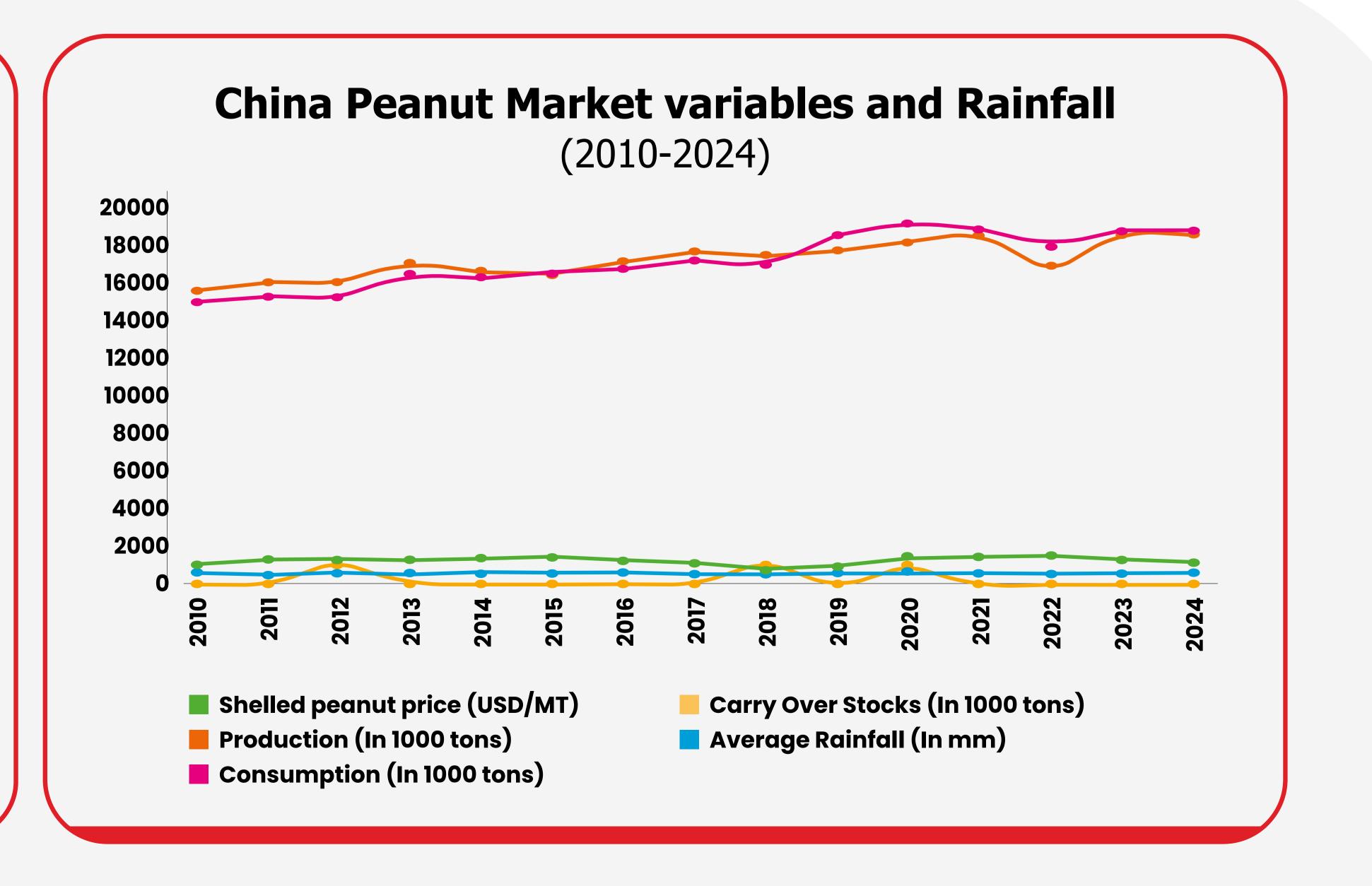












The 2025 peanut season is shaping up to be one of the largest in recent years, supported by generally good quality and high volumes, despite weather variability and delayed harvest. However, the season faces key challenges, including a lack of harvesting machinery, oversupply, and falling prices. Yields have been mixed but overall positive. A notable shortage of larger sizes (30/35 and 38/42) has been reported, with a higher share of immature kernels and more availability in 40/50 and 50/60 sizes. Looking ahead to the 2025/26 season, field lease values remain undefined. At current price levels, peanuts are considered less attractive for planting, and a reduction in planted area is expected as farmers reassess profitability under current market conditions.



On July 9th, U.S. President Donald Trump announced a 50% tariff on Brazilian imports, triggering immediate market reactions. Brazilian equities declined, and the BRL weakened against the USD. While it's uncertain how long this tariff will last, it poses significant risks to Brazil's economy and could influence the peanut sector. Overall market conditions in Brazil remain largely unchanged from last month. Farmers are still hoping for a price rebound, though that window is narrowing. Chinese demand continues to provide some support, particularly for peanut oil and crushinggrade peanuts, while European activity remains subdued. Many believe Europe's current caution is linked to heavy buying in 2024 following Argentina's small crop in 2023. Soil preparation for the next planting season has begun, but uncertainty is high. A reduction in peanut acreage is expected in São Paulo due to higher costs and poor returns. Meanwhile, production outlooks in Mato Grosso and Mato Grosso do Sul remain unclear. In June, Brazil exported 20,000 tons of peanuts and 13,500 tons of peanut oil—both down from May. However, year-to-date peanut oil exports reached 66,600 tons, up 148% from 2024, with strong demand earlier from China and the EU.

The USDA projects U.S. peanut planted acreage to rise by 5% in 2025/26, reaching 1.9 million acres—the highest since 1991. Georgia leads with a 6% increase to 900,000 acres. Yields are forecast at 4,000 pounds per acre, up 9% from last year. With higher acreage and yields, total U.S. peanut production is expected to reach 7.4 billion pounds, 952 million pounds more than the previous year—potentially a record-breaking harvest.



in these areas. Sowing activity has strong production.

In Gujarat, the been strong and has surpassed summer groundnut crop is active last year, indicating a promising but with poor quality. As of July season. In Halvad and Bhavnagar, 7, sowing reached around 101% the summer crop is nearly complete, compared to the same time last with daily arrivals between 300 and year. In Kutch, local Java quality has 1,000 bags. These regions also report mostly ended, and Bengal quality is better sowing figures than last year. now in use. Continuous rains have In the southern region, Tamil Nadu affected several areas, particularly arrivals have closed, with only a few Pathvada, where 40% of sowing is still stockists and cold storage supplies pending. Deesa market recorded available. Andhra Pradesh and 30,000 bag arrivals today, mostly Telangana have almost completed low-grade with high moisture. sowing, with early arrivals from In Junagadh, Keshod, and Gondal, Gadwal and more expected from trading is focused on NAFED stocks Anantapur, Kadapa, and Proddatur. and Bengal quality from MP and UP. Bengal remains dominant in both Around 10% of the winter crop remains oil and domestic markets due to



OTHERS

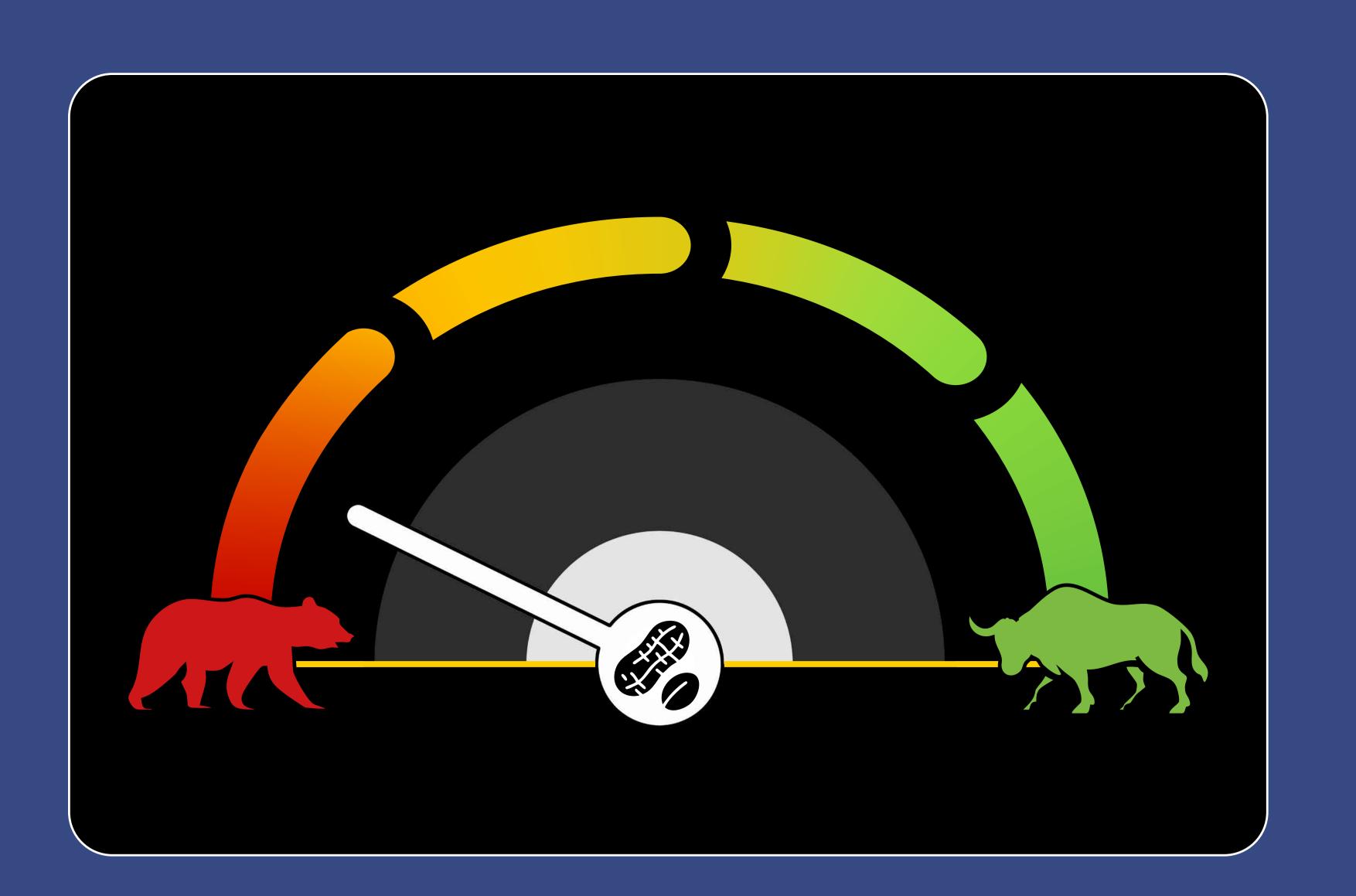
Indonesia The Indonesian peanut market is currently dominated by old crop 80/90 TJ, with most importers offering reddish varieties. While demand has picked up slightly, prices for old TJ remain stable due to ample availability. However, many buyers are now actively looking for new TJ or Andhra-origin peanuts, which are in short supply, putting upward pressure on Andhra prices. Locally, new 80/90 TJ is quoted at \$1320/MT with strong demand but no cargo available. Java 80/90 is firm at \$1410/MT due to tight supply from both Andhra and Java. Bima's local hybrid crop is limited, priced around \$1350/MT.

South Africa 'Harvesting is 95% complete, with an expected yield of 60,000–61,000 tons (kernel basis). Due to a dry January and cooler conditions in March-April, kernel sizes are generally smaller. Aflatoxin levels are very low or absent. Market activity remains strong.

Sudan Sudanese peanuts at Huangdao Port are priced around \$1,230/MT, but logistical issues are making them less competitive. China, the largest importer of Sudanese peanuts, is shifting to Brazil, Argentina, and India for more reliable and cost-effective crushinggrade supply.

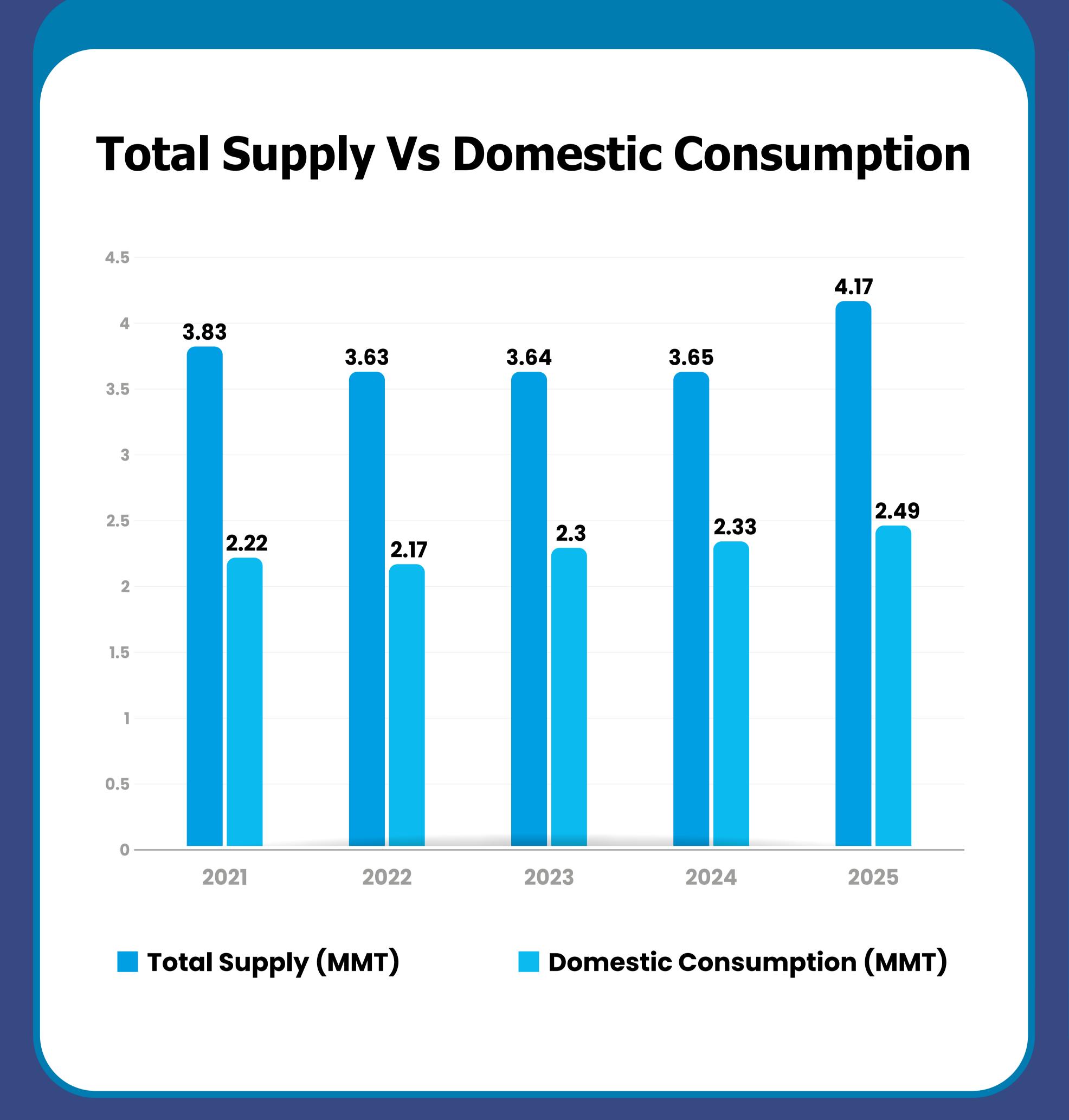


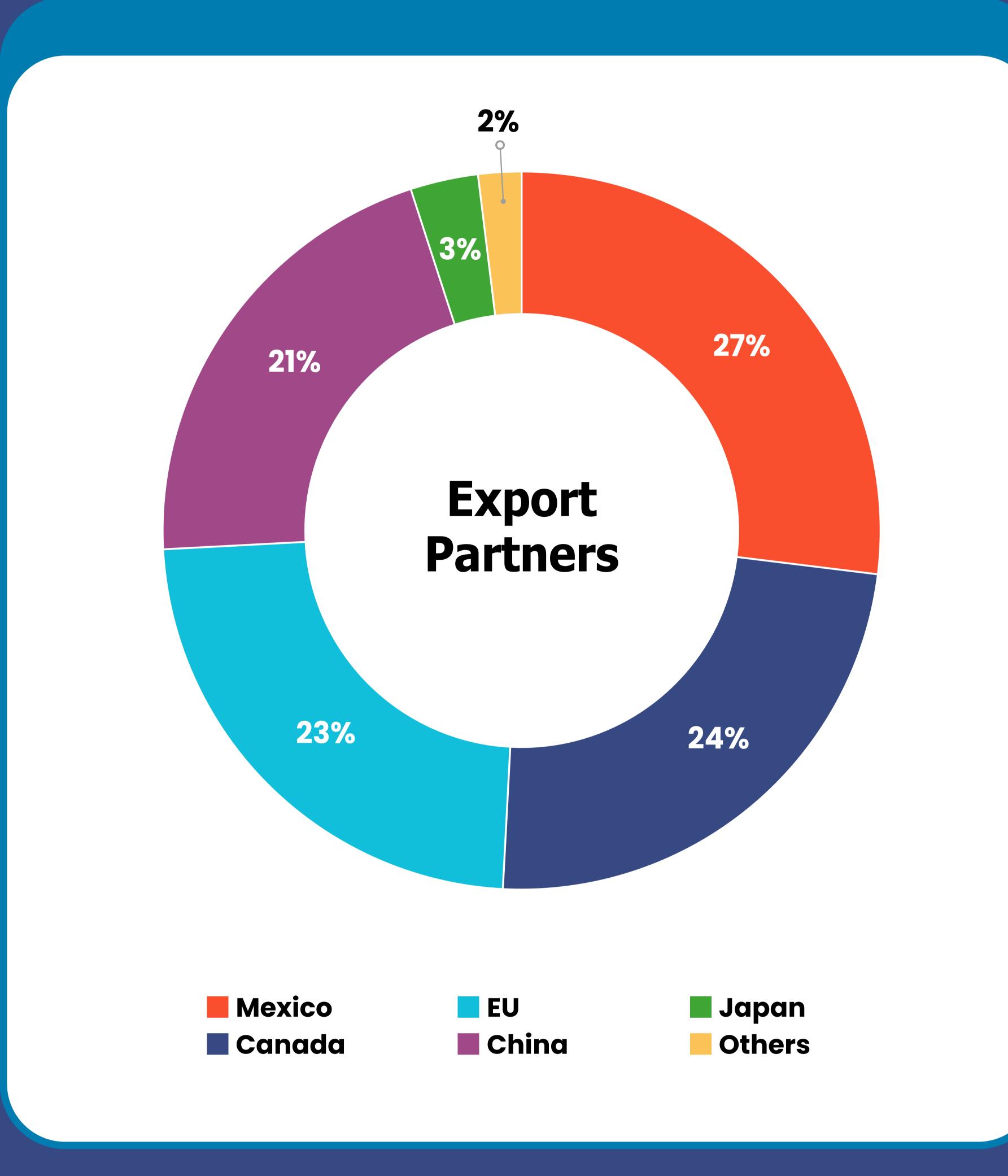
CHINA The domestic peanut market in China remains stable with a slightly weakening trend, driven by weaker demand and slow inventory clearance. New crop arrivals from Jiangxi and Hubei, along with Henan's spring peanuts expected by early August, are reducing speculative activity. Domestic trade and food factory sales are sluggish, slowing inventory drawdowns. A sharp price surge in May led to rushed buying and lax quality control, resulting in lower-quality coldstorage stock now being discounted. A 3-4% increase in planting area and generally favorable weather—except in Zhengyang, Henan—suggests a loose long-term supply outlook, adding mild price pressure. However, limited old-crop inventory and drought concerns in Henan could affect new crop yields, helping support prices. Additionally, smaller planting areas and weaker cost-efficiency in Hubei and Jiangxi limit actual supply pressure. Blanched peanuts are currently priced at \$1,340/ton FOB for 25/29 size and \$1,270/ton FOB for 29/33 size. Meanwhile, first-grade peanut oil is averaging around \$2,095/MT.

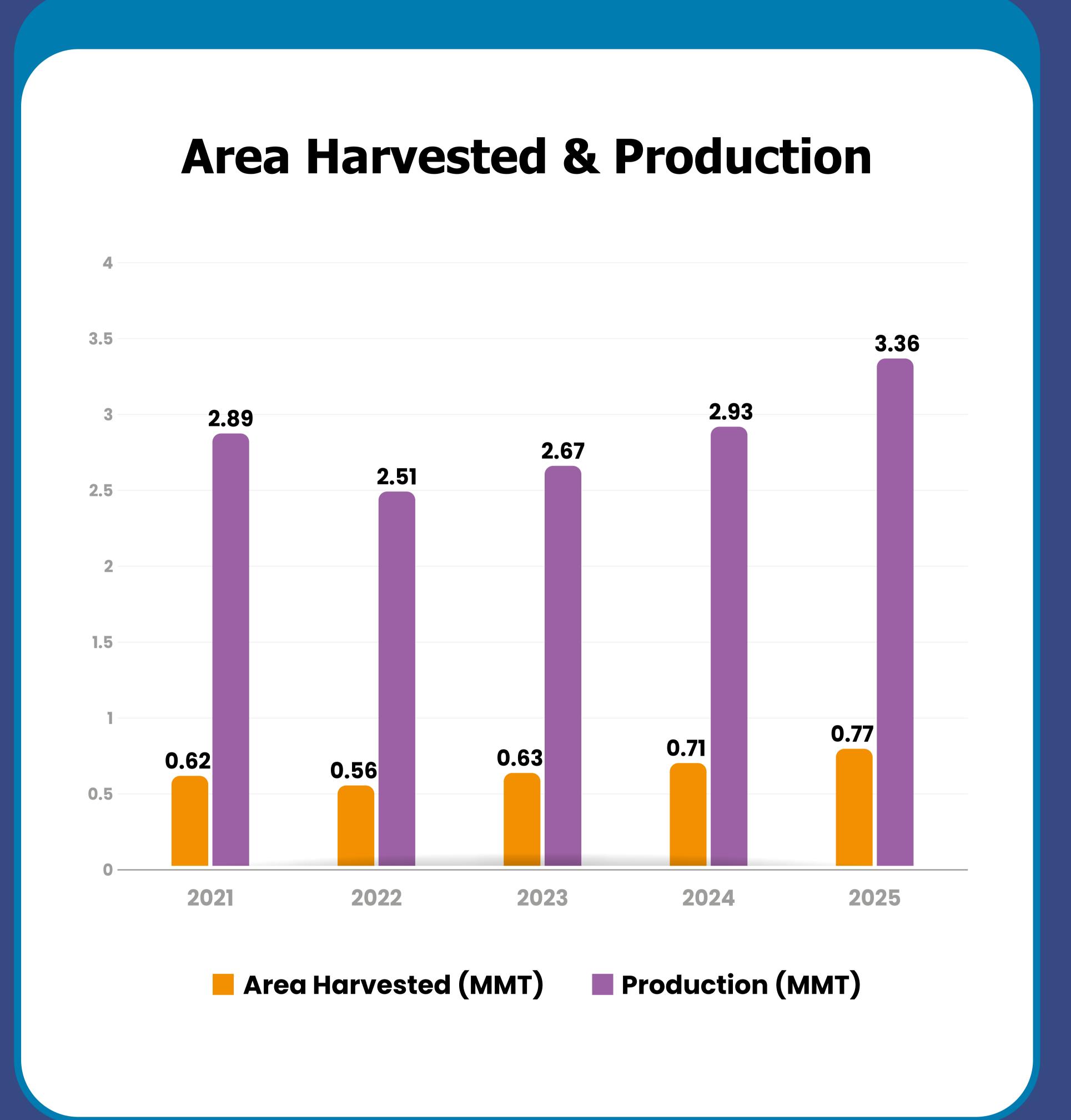


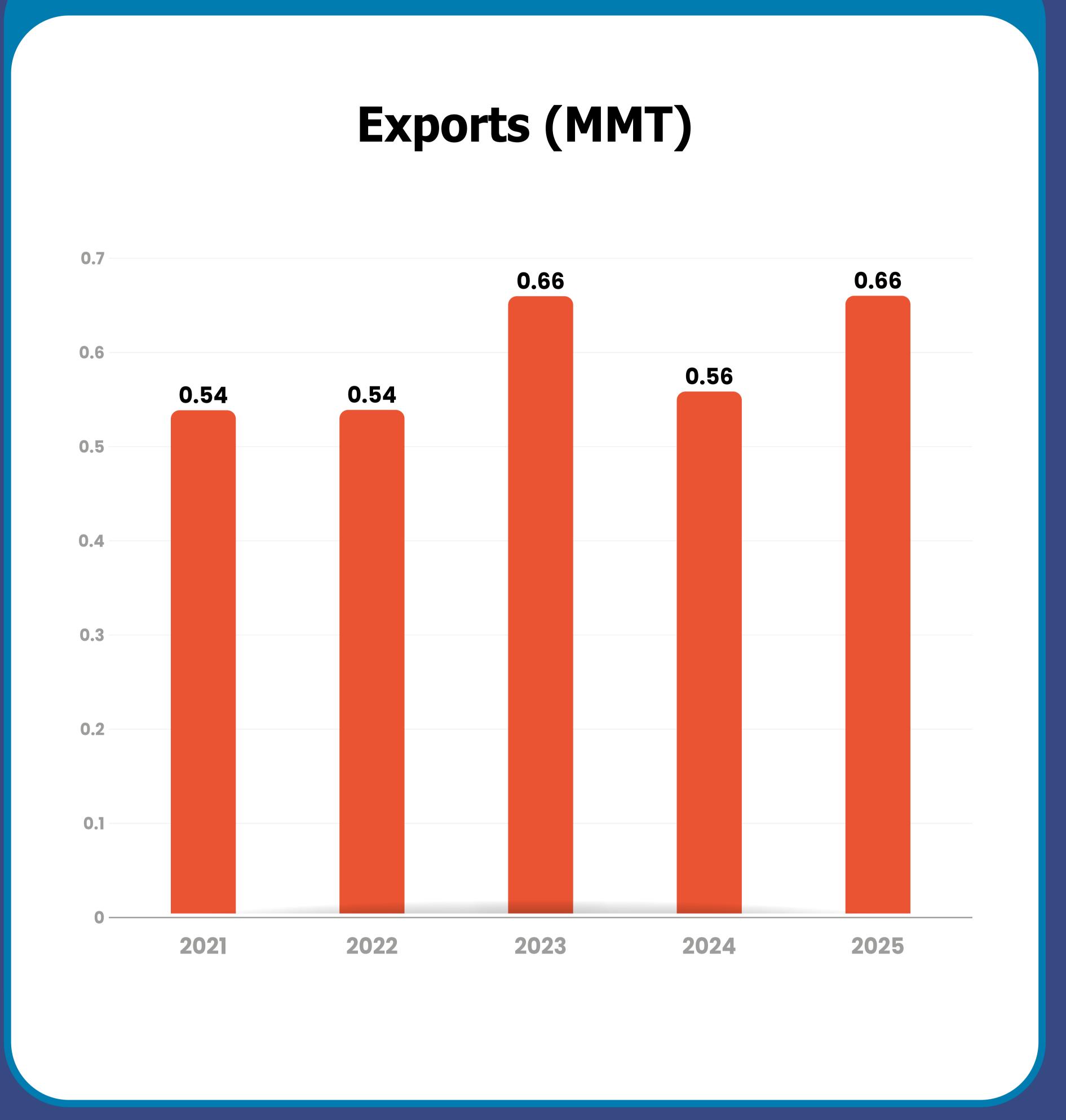
USA PEANUTS - DEMAND & SUPPLY

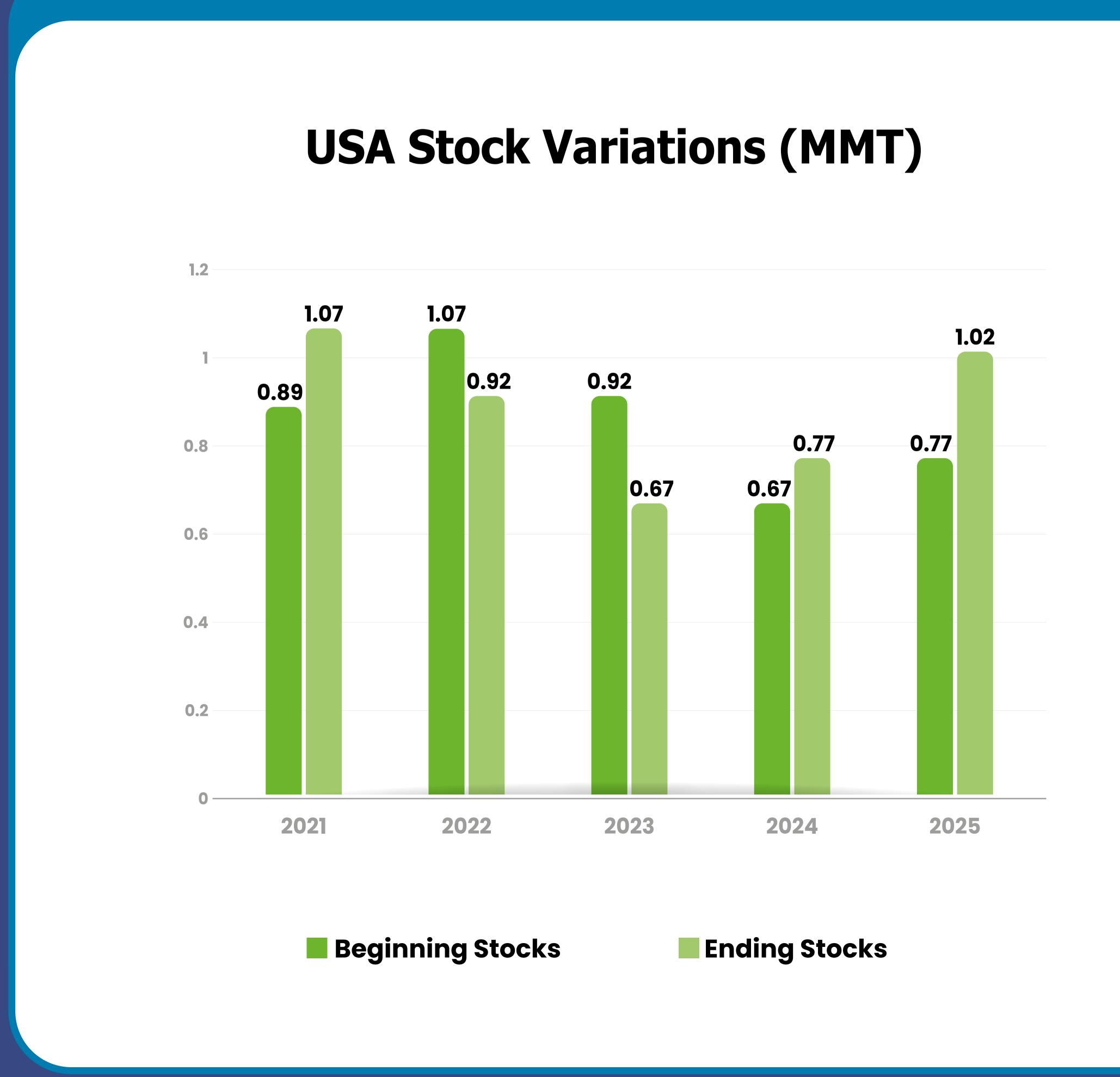
U.S. peanut production is forecast to rise 5% in 2025/26 to 3.36 MMT, driven by increased acreage and favorable yield trends. With total supply projected at 4.17 MMT and domestic consumption at 2.49 MMT, the market shows a clear surplus, indicating strong supply availability.By July 20, 80% of the crop had reached the pegging stage, slightly ahead of average, and 69% was rated good to excellent, supporting expectations for a strong and healthy harvest.

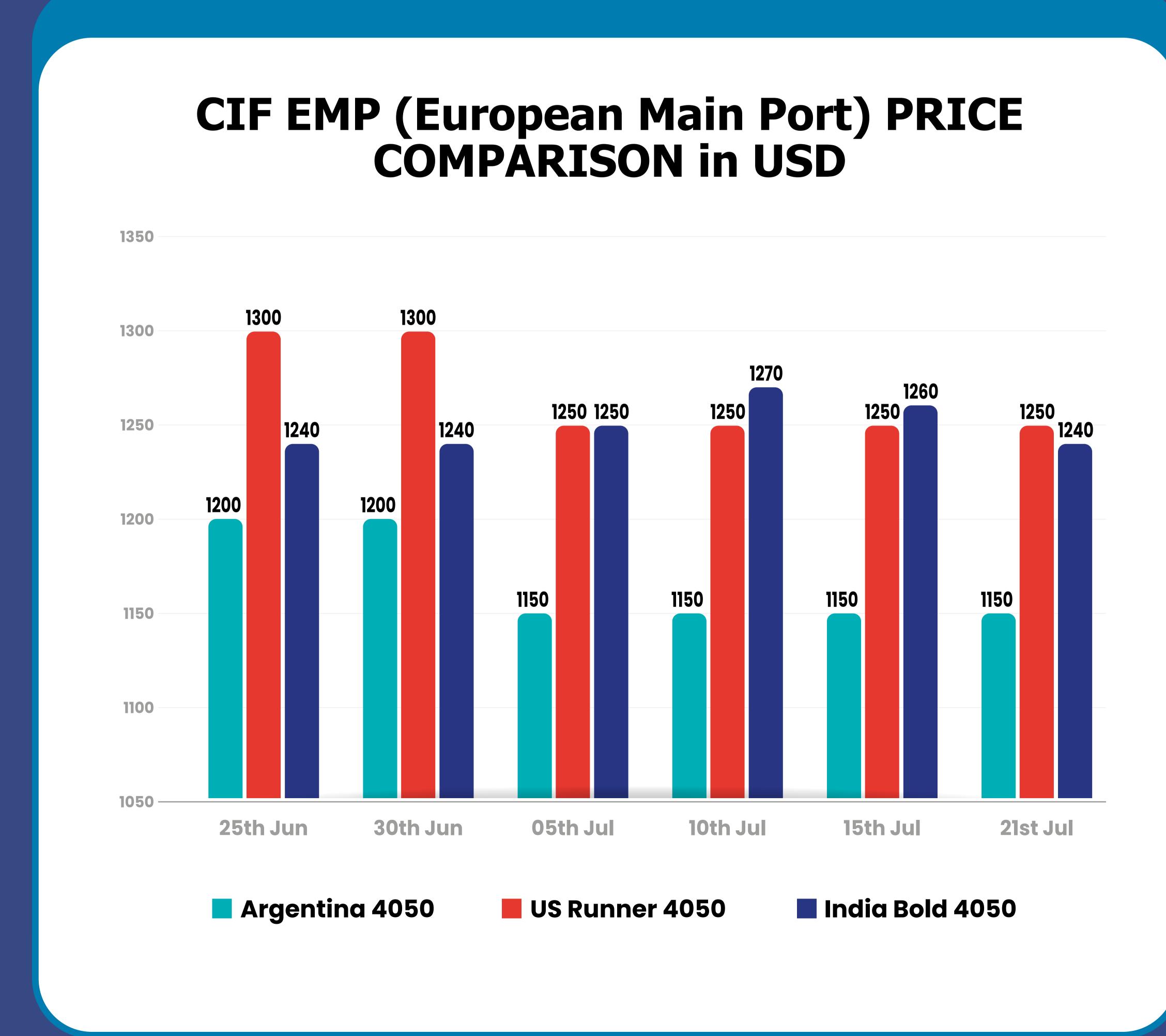














ARG 4050 - \$1150 V



This season, big-size peanuts are limited; more immature kernels and mid-sizes like 40/50, 50/60 dominate.

BRZ 3842 BL - \$1200 🗸



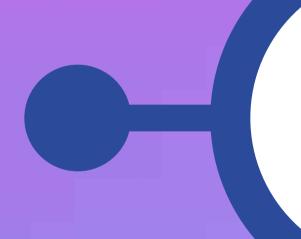


Some growers have

CHI 41/51 - \$1430 🗸



The new crop is growing well overall; Henan saw slight drought with minimal impact.



IND TN Java 5060 - \$1385 🛕

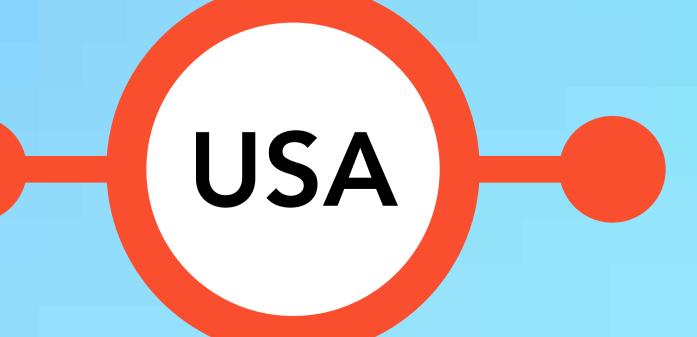
India's summer peanut crop faced 30-40% losses due to adverse weather.



The supply of crops reaching the market is very low.



to be finalized shortly.



10

80% of the U.S. peanut crop has pegged; 69% is rated good to excellent.

66 A dynamic leader with 22+ years of experience in agribusiness, driving farmer empowerment, promoting women and youth-led entrepreneurship, and advancing sustainable, nutrition-sensitive agribased models for rural development.

Dr. Dinesh Kumar Chauhan CEO-AIP ICRISAT



The Agribusiness Innovation Platform (AIP) at ICRISAT is transforming the peanut value chain by connecting farmers, processors, and markets. By enabling access to improved seeds, climate-resilient practices, processing units, and strong market linkages, AIP enhances efficiency, product quality, and profitability. In Telangana (Wanaparthy), Andhra Pradesh (Ananthapur), and Odisha (Nuapada), AIP has established groundnut value chains through training in Good Agricultural Practices (GAPs), introducing improved varieties, and supporting production of value-added products like chikki, peanut butter, and cold-pressed oil—ensuring sustainable growth and increased incomes across all stages of the value chain.



Ever wondered why tiny peanuts often taste sweeter? It's because smaller kernels—typically around 7 mm—are usually less mature and still rich in natural sugars. As peanuts mature, these sugars are gradually converted into oils, so the larger the peanut, the less sweet it becomes. But that's not all. When roasted, small peanuts release more intense aroma compounds, such as pyrazines and furfural, which are responsible for that classic roasted peanut smell. These flavour-packed compounds are more concentrated in smaller kernels, making them not only sweeter but also more aromatic. Advanced scientific techniques like GC-MS-O have confirmed what our taste buds already know—smaller peanuts don't just taste better, they smell better too! smaller peanuts don't just taste sweeter, they smell better too!



Managing the Quality Risks of Discoloured Peanuts Through Precision Sorting Technology

In the global peanut supply chain, kernel uniformity and visual integrity are critical indicators of quality. Discoloured peanuts, characterised by faded testa, blotches, mold spots, or internal browning, pose serious challenges to food processors, exporters, and manufacturers.

Causes of Discolouration

Discolouration is often symptomatic of broader chemical or microbiological degradation, and in some cases, may indicate the presence of aflatoxins, posing potential food safety risks.

Multiple pre and post harvest factors, including:

- Fungal infections (e.g., Aspergillus, Rhizopus) during storage or in the field
- Oxidative browning of oils due to lipid peroxidation in aged or improperly stored kernels
- Physiological maturity issues, such as premature harvesting or over-maturity
- Mechanical or insect damage leading to localised deterioration
- Poor post-harvest drying or high moisture, promoting microbial activity and pigment breakdown

Quality and Economic Impact

Even a small proportion of visually defective peanuts can compromise the appearance, aroma, and consumer acceptance of finished goods, especially in roasted and snack-grade formats.

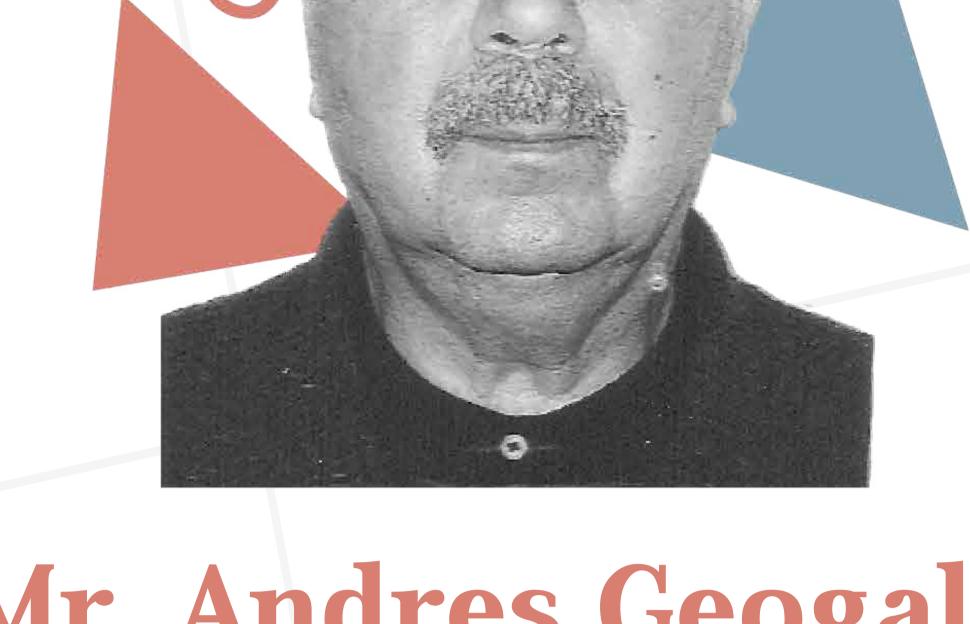
Discoloured Kernels Lower Grades and Impact Value:

- Market acceptability and export eligibility
- Batch-level rejection in processing facilities
- Reduced extraction yields in paste and butter applications
- Increased QA/QC rework costs
- Brand reputation risk in consumer-facing products
- Elevated risk of regulatory non-compliance in aflatoxinsensitive markets such as the EU
- Lower price realisation in commodity auctions and bulk trading platforms

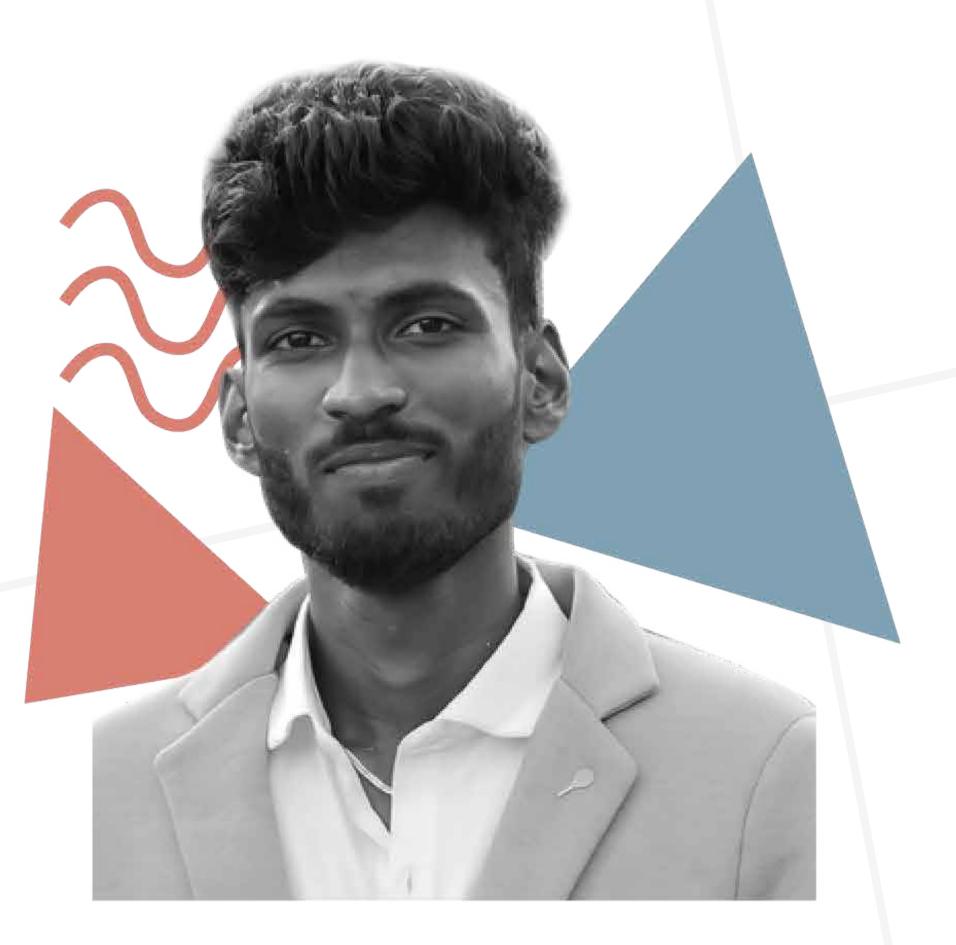
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Upcoming Events



Agrocrops High-Resolution Kernel Sorting Capability

Agrocrops ensures quality integrity using advanced optical laser sorters that detect and remove discoloured kernels in real-time. By analysing spectral reflectance, patterns, and colour gradients, these systems surpass manual inspection, ensuring only visually consistent, safe, and specification-compliant peanuts proceed to processing, enhancing value and reliability across the supply chain.



20-22 August 2025

Bombay Exhibition Centre, Mumbai, India



18-20 August 2025

ALBANY, Gerogia





Don't be fooled by their cute exterior. Ladybugs are voracious eaters — especially of pests that plague peanut crops, like aphids, mites, and soft-bodied insects. A single ladybug can devour up to 50 aphids a day. That's not just pest control — that's a full-on cleanup crew, done nature's way.

In the context of IPM, ladybugs play a vital role by reducing the need for chemical pesticides. Instead of spraying entire fields, farmers let biological control do the work. The result? Fewer chemicals, healthier soil, and a safer ecosystem for pollinators, wildlife, and humans alike

Why It Matters for Sustainability

Modern agriculture is under pressure to grow more with less — less water, less land, and definitely less environmental damage. By using natural predators like ladybugs, farmers are embracing a low-impact, high-benefit strategy that aligns perfectly with regenerative and sustainable farming goals.

In peanut farming, this means:

- Reduced pesticide use, lowering input costs and environmental impact
- Improved biodiversity, as ladybugs help restore natural balance
- Healthier plants, with fewer pests weakening the crop
- Cleaner groundwater and soil, free from excess chemicals

Ladybugs as IPM Influencers

In a world of climate challenges and rising input costs, farmers need solutions that are smart, scalable, and soil-friendly. Ladybugs check every box. They're living proof that nature, when respected and understood, can be a powerful farming partner.

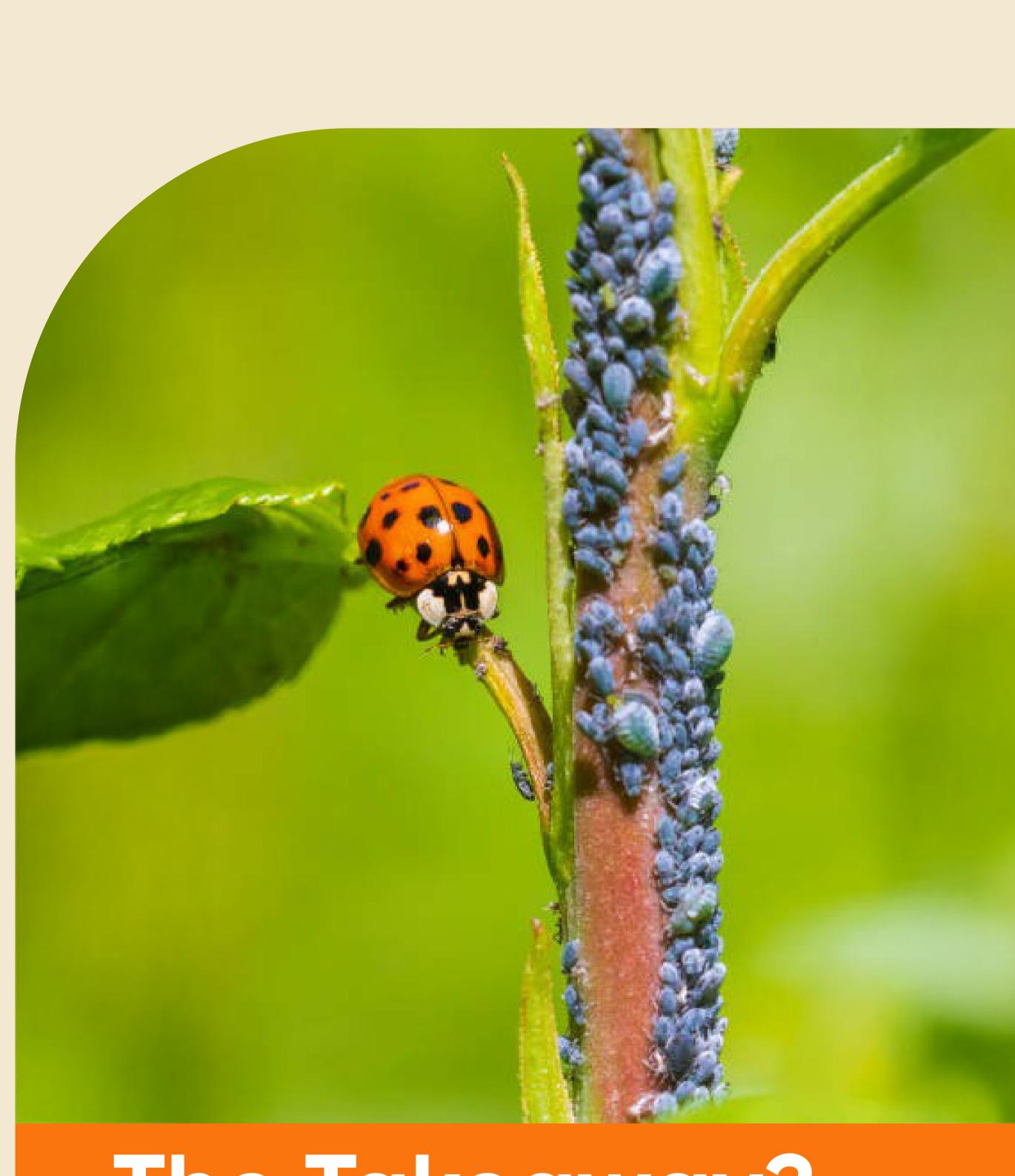
Across peanut-growing regions, from India to the U.S., IPM programs are actively encouraging the use of beneficial insects. Some farmers even release ladybugs manually, letting loose armies of these spotted warriors across fields to naturally "bug out" the bad guys.

SUSTAINABLITY

Bugging Out the Bad Guys: Ladybugs and Integrated Pest Management in Peanut Agriculture

When you think of heroes in farming, you might picture tractors, tools, or even the hardworking hands of farmers. But what if we told you one of the most powerful allies in sustainable peanut farming is no bigger than your fingernail — and wears red with black polka dots?

Meet the ladybug, nature's charming assassin and a secret weapon in Integrated Pest Management (IPM) for peanuts



The Takeaway? Think Small. Win Big.

Ladybugs may be tiny, but their impact on sustainable peanut farming is massive. By letting nature lead, peanut growers are proving that farming can be both productive and planet-friendly — with a little help from some polka-dotted pest busters.

12

BIRD FEED

Peanut Innovation in Wild Bird Feed: What's Coming by 2050?

From bioengineered nutrition pods to Al-powered feeders, peanuts the timeless bird feed staple are soaring into a futuristic orbit.

A New Era for Bird Feeding Has Landed

By 2050, wild bird feeding isn't just tossing a few seeds into a tray—it's a high-tech, precision-based, eco-conscious experience. Peanuts, known for their high fat and protein content, are leading this revolution. But these aren't your average kernels. They're engineered, optimized, and personalized for every bird's health, habitat, and hunger level.

Designer Peanuts: Nutrition Tailored by Bird Species

Birds in 2050 won't just eat peanuts—they'll eat peanuts built just for them.

- Bioengineered strains deliver extra calcium for nesting songbirds.
- High-omega blends help migratory species store energy for long journeys.
- FeatherBoost peanuts contain added keratin for faster feather regrowth post-molting.

Forget one-size-fits-all.
In the future, every
feather gets its formula.



Nutrient	Standard Peanut (2024)	Avian Peanut (2050)
Protein (%)	26%	31%
Omega-3	Low	Enhanced
Calcium	Trace	5x Higher
Keratin Additive	None	Included

AI-Enabled Smart Feeders That Learn and Adapt

Picture this: your feeder knows the bird species visiting, the weather conditions, and even what your local birds are craving. Welcome to SmartFeeder Al System of 2050.

- Pacial recognition cameras track returning birds.
- Behavioral algorithms adjust feed mix based on age, mating season, or energy needs.
- Feeders adjust peanut type and volume automatically in cold snaps or during migration season.

"Your backyard feeder becomes a bird nutritionist."

Zero-Waste Delivery & Smart Packaging

In 2050, peanut packaging does more than hold peanuts:

- Edible, biodegradable pouches that birds can nibble on directly.
- QR codes that link to real-time sourcing data and suggested feeder settings.
- Drone deliveries to remote reserves and ecoparks.

"The package is the product—and the feeder."

Blockchain-Verified Bird Feed Supply Chains

High-end feeders and sanctuaries will demand traceable, transparent peanut sourcing:

- Each peanut batch has a blockchain ID to verify harvest date, farm origin, and aflatoxin test results.
- Certification bodies log growing and storage conditions.
- Buyers receive instant alerts if a lot doesn't meet eco-bio standards.

"Peanut provenance meets precision conservation."

The Rise of "Peanut Pods" - Nutritional Capsules for Birds

Instead of loose feed, birds in 2050 may eat speciesspecific pods:

- Each pod contains a precise nutritional dose.
- Coated with natural scents to attract specific species (e.g., anise for starlings).
- Pods dissolve slowly in rain, reducing waste and spoilage.

Final Thoughts: Why 2050's Birds Will Thank You

By 2050, wild bird feeding will be a blend of science, sustainability, and smart design. And at the heart of it? The peanut—reinvented, revitalized, and ready to nourish a new generation of birds.

"The birds may be wild—but the feeding will be wildly intelligent."

Peanut Sience

X-Ray Imaging Breakthrough: Scientists Race to Combat Argentina's Hidden Peanut Fungal Threat

Argentina isn't just a top peanut-producing country; it's a global powerhouse, supplying over 25% of the world's peanut exports and generating thousands of jobs across its farming and processing sectors. Peanuts are not only a key agricultural product but also a vital contributor to Argentina's economy. However, that success is under serious threat from a silent destroyer: peanut smut, caused by the fungus Thecaphora frezzii.

X-Ray Imaging and Rating of Pods

That's where this innovative U.S.-based study comes in. Because T. frezzii is not present or allowed in the U.S., researchers ingeniously created faux-infected pods using materials like ground coffee, corn starch, and fungal spores from a related species to simulate disease symptoms. These "phantom" pods were scanned using a custom-built line-scan X-ray imaging system—a fast, non-destructive tool that could one day revolutionize how breeders identify resistant lines.

The system was tested on over 3,300 pods across all major U.S. market types. Human raters achieved ~85% accuracy in detecting infection status from the X-ray images. Though small or subtle infections (like artificial sori) were harder to catch, the tool shows strong promise for high-throughput screening, especially once paired with machine learning for image analysis.

This research is more than just a clever workaround; it's a critical bridge. If further validated in real field conditions, this approach could accelerate breeding of smut-resistant varieties, helping protect one of Argentina's most valuable agricultural exports.

This soil-borne disease infects pods underground and can devastate yields. With no effective fungicide and limited resistance in existing cultivars, the best defense is breeding smut-resistant varieties. But how do we find them efficiently?







Source: Wang, N., Weckler, P. R., Zhang, Y., Errabelly, A., Payton, M. E., Baldessari, J., ... & Bennett, R. S. (2025). Peanut Science, 52(1), 89-96. https://doi.org/10.3146/0095-3679-52.1-ps-1629



data including health, moisture, and yield estimates-directly from the field. With this edge, a single glance enables pre-harvest planning like never before for the Procurement.



