PEARUT POST



Literally translates to "flower-born," referring to how peanuts flower above ground and fruit below

RET HIGHTS

Currently, the largest With harvest volumes Amid widespread rejections. The 2025 cropping is about 0.35 MMT.

New Java/Spanish crops arrived in August, though the volumes were small and of poor quality—wet, high in moisture, and mostly in 70/80 and 50/60 counts, priced around \$1,300 and \$1,450/MT respectively. The summer crop in Gujarat was largely a washout, with 50-60% damage caused by the That said, selling pressure to the upcoming winter prices. crop as well.

With poor-quality peanuts circulating in the domestic market, prices have struggled to gain momentum. Meanwhile, oil prices declined from \$1,575 to \$1,500/MT, reflecting ample supply for crushing.



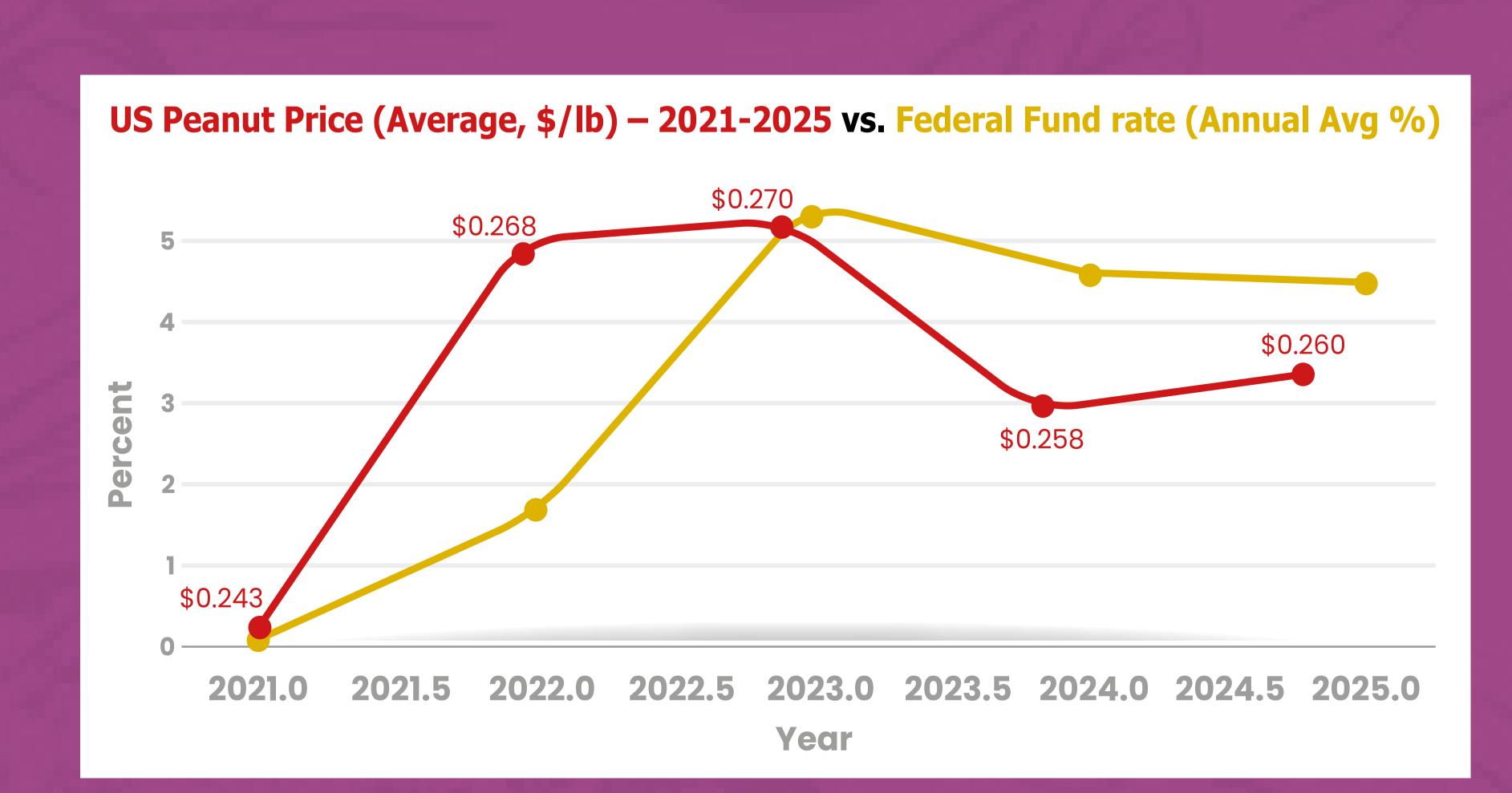
"HAHA"lots(high-aflatoxinor competitive prices high-acid) priced between \$800-1,000.

early monsoon. Ongoing is gradually easing, which is rainfall now poses a risk beginning to support firmer



continues to offer so-called and raw peanuts at highly

stockholder in India is projected at 2 MMT in 2025, of "HAHA" quality (high- 7% higher than the previous NAFED, the state agency Argentina is emerging as aflatoxin or high-acid) year. Yet, the peanut supply managing the MSP program, a competitive player lots, prices fell sharply chain is operating at a loss holding approximately alongside India. Price from \$1,100 to the \$800 of nearly 30% compared to stability has weakened as range. Peanut oil prices 2024. Could this be linked to sellers focus on disposing also softened, dropping steady interest rates balancing of stocks. Bird feed peanuts from \$1,550 to \$1,500/ inflation? Most likely, yes. traded between \$800–900 MT, driven by increased Higher financing costs force FOB, while food-grade higher availability of low-cost manufacturers to recalibrate counts were in the \$1,100- peanuts for crushing. pricing across channels. While 1,200 range—creating strong Currently, the market rising production supports competition with Brazil, which offers a range of blanched stronger bargaining power, the global trade dynamic is shifting. With good crops and competitive pricing, Latin America—and to an extent India and China—are eroding America's market share with prices lower by as big as 150-250\$/ton



DEMAND



peanuts from Brazil and in significant losses for Paraguay, along with importers and stockists, recurring pesticide issues. as demand conditions The key question remains worsened. whether this is primarily a price, market, or quality Snack issue.

The market was targeting peanut oil below \$1,500/ considered uneconomical. with Brazilian oil, further dampening activity.



struggled with a shortage of good-quality peanuts, while the market continued to bring in lower-grade MT, crushing peanuts supplies from India (to for 50/60 counts in the below \$700-800/MT, and average cost), many of range of \$1,300-1,500/MT, sluggish since the start of food-grade peanuts below which turned out to be \$1,100/MT. However, very mouldy. Import volumes few transactions were during August fell to 20%concluded as prices were 35% of port capacity time. across various locations. Additionally, the market The price range for 80/90 continues to hold large counts traded between IDR stockpiles of Indian and 14,000 – 18,500, depending African peanuts, along on quality. Overall, the market is in an extremely difficult position, with limited prospects for recovery in the near term.



supply, creating the present shortage.

Active demand is noted but good-quality supplies from preferred origins are simply unavailable at this

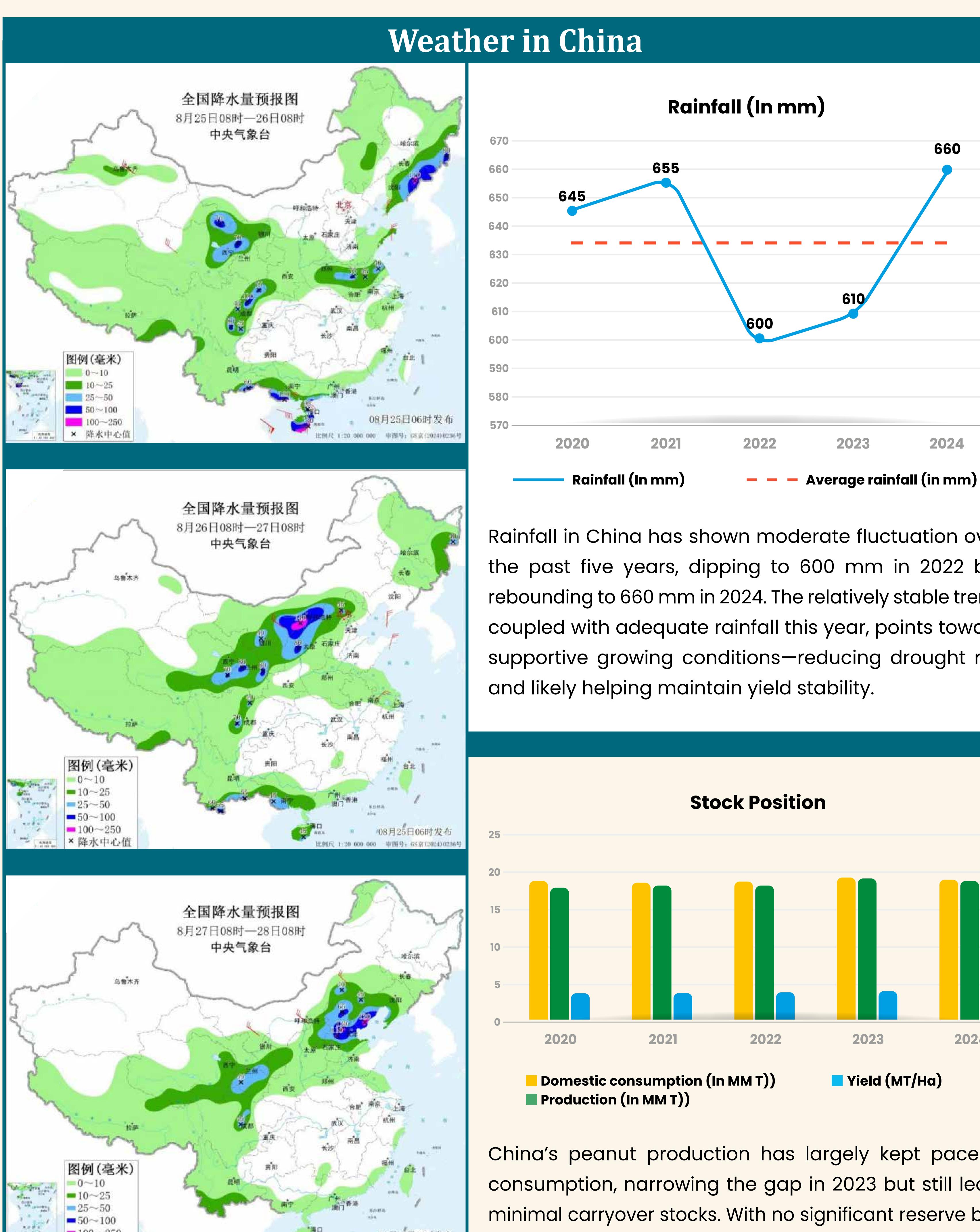


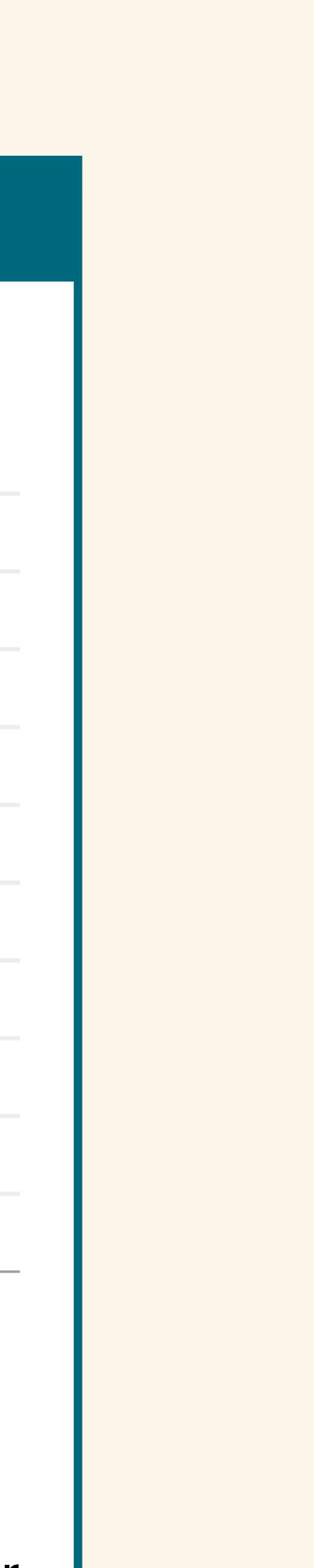
On a scale of 1–5, China's The defining keyword for The market is currently Russian consumers favour demand remained at 1 the Indonesian peanut facing an acute shortage high oleic products for their throughout August. Market market in August was of peanuts. Demand for longer shelf life. However, reports highlighted port "losses." Imports from premium Java/Spanish we continue to notice a rejections due to FFA Tanzanian, South India, varieties remains strong, significant quality gap and high aflatoxin levels Gujarat, and blanched with imports typically between Latin American in sesame seeds and peanuts collectively resulted averaging around 4,500 and Indian origins, largely tons per month. However, due to differences in stringent government technology and quality quality controls and the control. Brazil, Argentina, blacklisting of several and Paraguay remain leading Indian shippers competitive, with the latest have severely constrained business concluded at \$1050 CFR for raw 38/42, and no delivery issues reported.

> Russian demand has been 2025. High cocoa prices have reduced candy and chocolate consumption considerably, though we hope for some improvement in the upcoming high season. While interest rates have declined, they remain elevated, especially with the rubble staying strong.

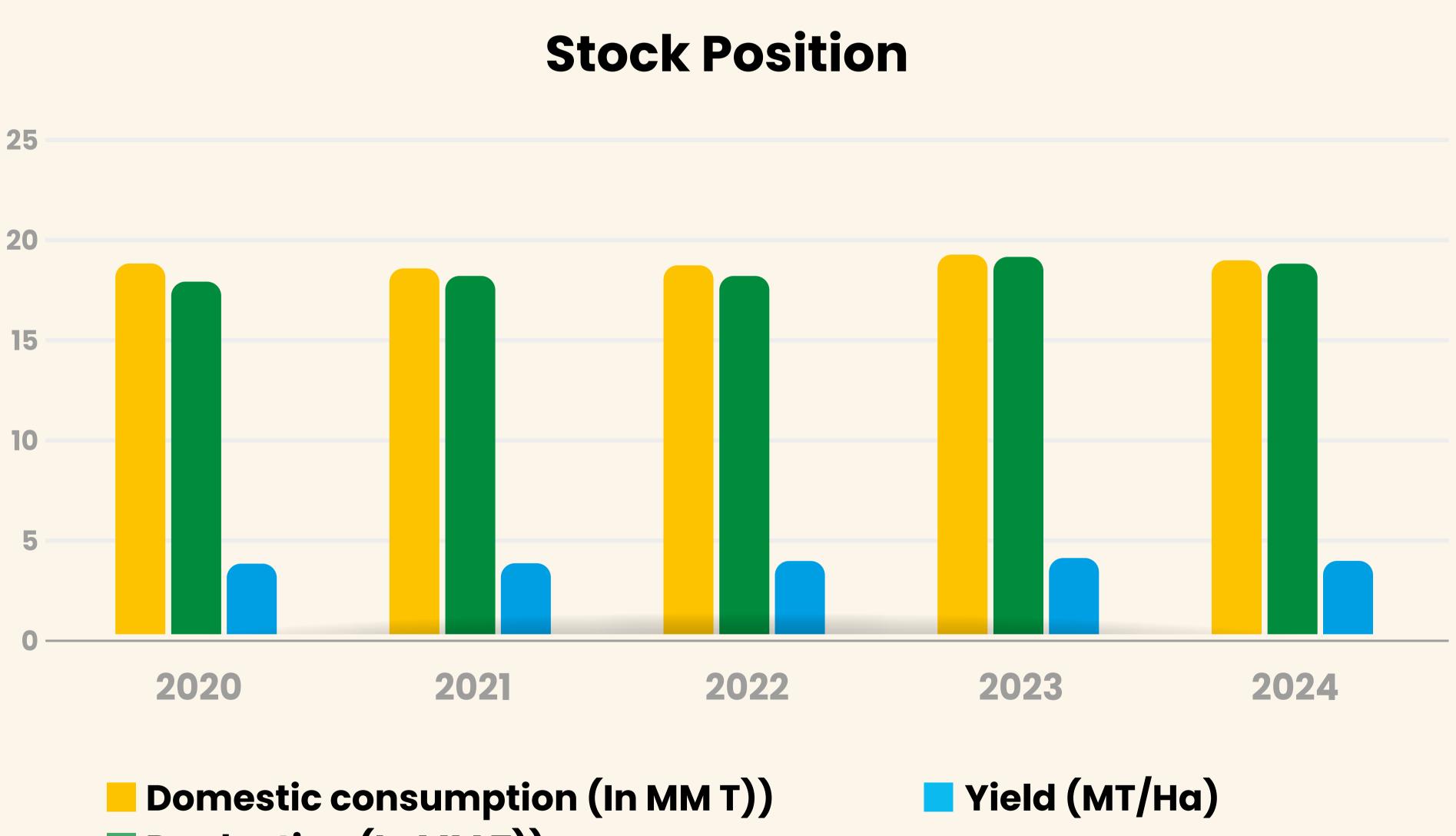
Market Highlights P-3 P-2

The world's top peanut producer is about to begin harvest—what can we expect, and how might it reshape the global peanut demand-supply balance?

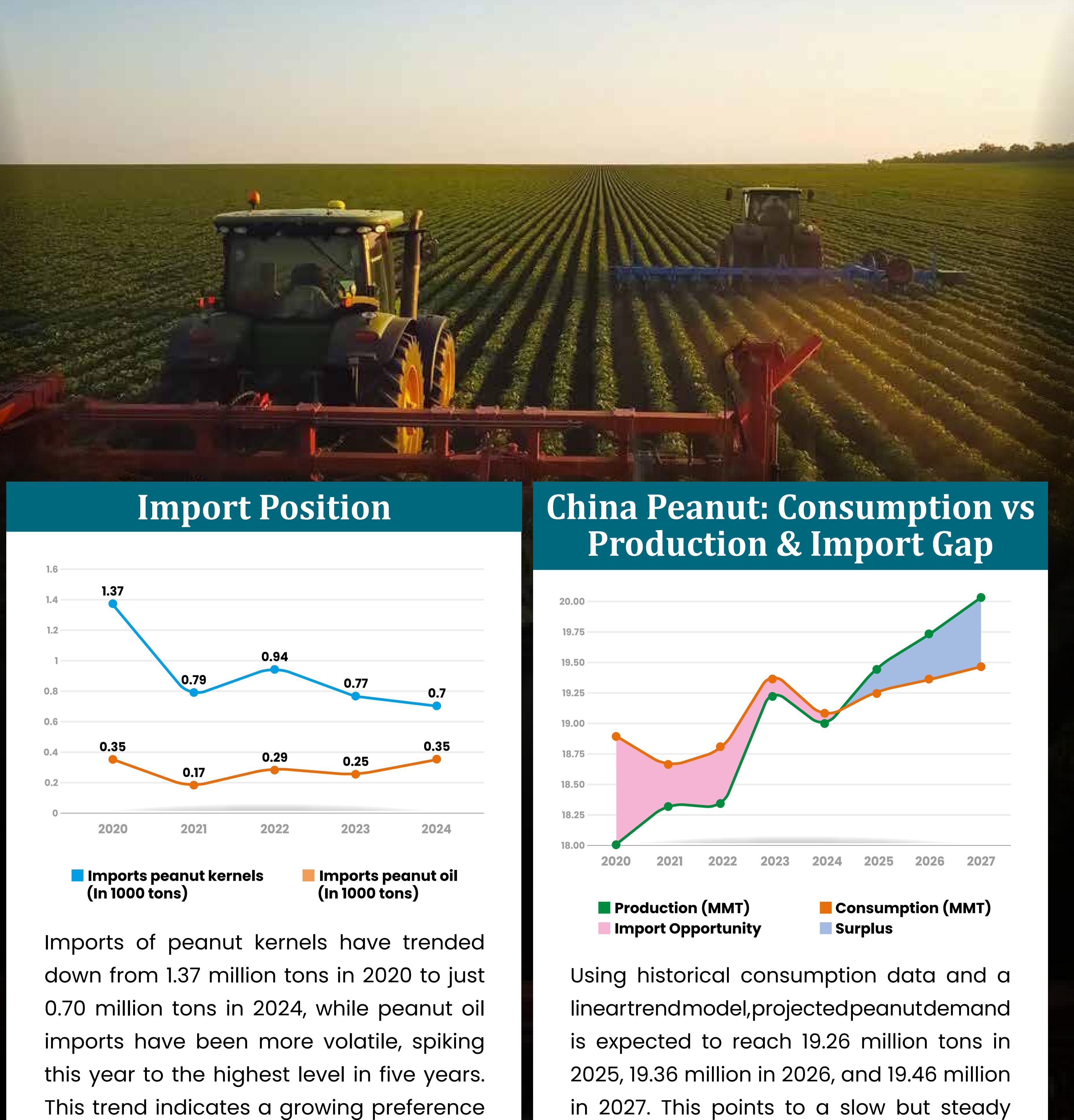




Rainfall in China has shown moderate fluctuation over the past five years, dipping to 600 mm in 2022 but rebounding to 660 mm in 2024. The relatively stable trend, coupled with adequate rainfall this year, points toward supportive growing conditions—reducing drought risk



China's peanut production has largely kept pace with consumption, narrowing the gap in 2023 but still leaving minimal carryover stocks. With no significant reserve buffer, any production shock could quickly translate into tighter domestic availability and stronger import demand.



upward trend, likely supported by rising percapita consumption, increased industrial applications, and substitution effects, despite the country's declining population.

Expectations of the New Season

- and potentially strong demand - for

peanut oil over raw kernels, possibly driven

by shifts in processing capacity, consumer

preferences, or trade policies.

- Weather conditions are crucial for achieving strong yields and successful harvests; even minor adverse changes such as drought or flooding can reduce unit yields, prompting China to increase purchases and explore new sourcing regions.
- Carry-over stocks from imports and domestic crops are nominal, offering little support for a bearish market outlook.
- China may adopt a more aggressive stance on exports in the coming period while simultaneously accelerating its import pace.

Peanut Wizard P - 5 P-4

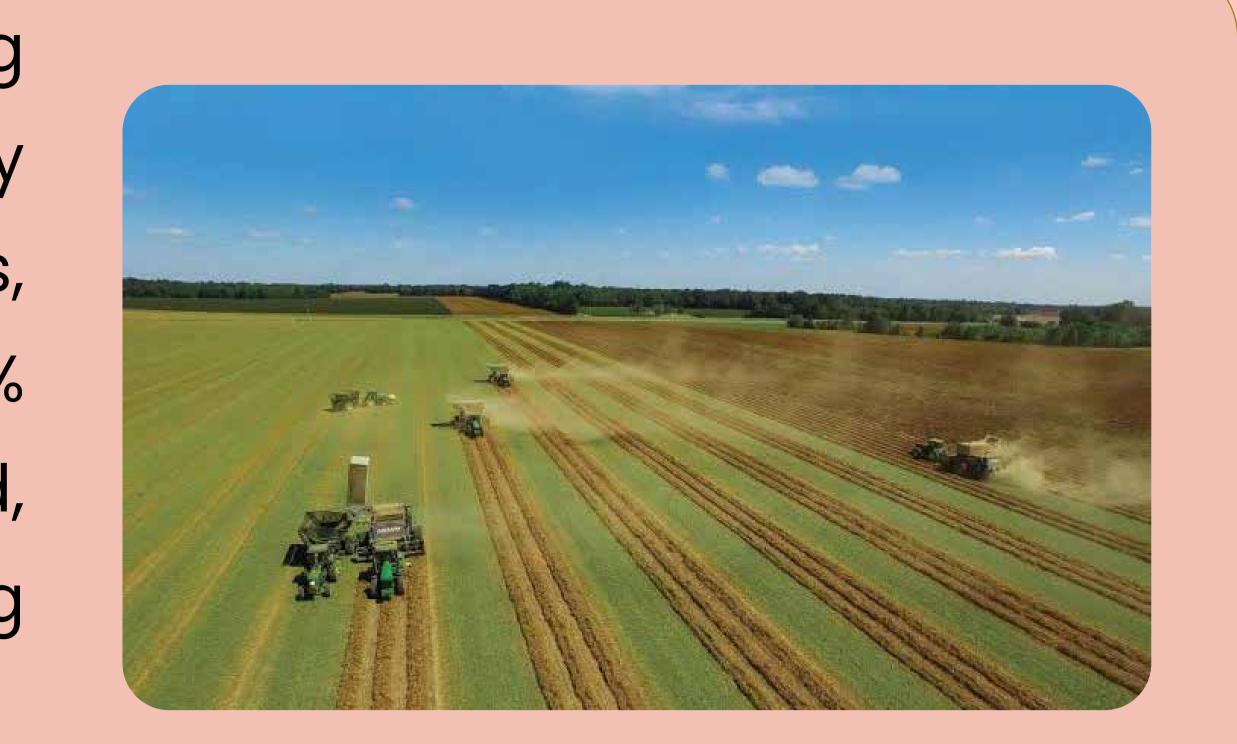
Argentina's peanut planting area for the 2024/25 crop is estimated at 535,000-540,000 hectares. With an average yield of around 3.7 MT/ha, production is expected to reach 1.98-2.00 million metric tons of in-shell peanuts. This volume signals a significant supply of Argentine peanuts entering the global market during the October 2025 to September 2026 marketing year. The large availability will weigh on international supply dynamics, and analysts project that it will take two full marketing years—2025/26 and 2026/27—for the balance between global edible peanut supply and demand to be restored. Consequently, the market should anticipate competitive pricing and abundant availability in the near term, before stabilizing in the medium term. (Reported by Georgalos Peanut World)



Brazil's peanut sector is entering a decisive period as planting approaches. Early estimates suggest a 20% reduction in planted area in São Paulo, while other states are expected to remain stable. More accurate figures should emerge soon. Exporters recently took advantage of strong overseas demand to clear overstocks, with July turning into a standout month. Brazil shipped 32.3 thousand tons of peanuts, including 14 thousand tons of kernels to China alone. This volume represents a 60% jump from May and more than double last year's July exports. Year-to-date shipments now total around 150 thousand tons, and if the monthly average of 21 thousand tons continues, exports could reach 255 thousand tons by December. Still, much hinges on China, whose upcoming harvest could sharply reduce demand. On the oil side, Brazil exported 17.6 thousand tons in July, up 30% from June and an astonishing 291% higher than July 2024. China absorbed 16.4 thousand tons, while Italy held steady at 1.1 thousand tons. Total peanut oil exports have reached 84 thousand tons this year—168% above last year—helping offset oversupply risks but leaving Brazil exposed to shifts in Chinese buying. (Reported by Samtraco)

Markets Global

There is ample peanut supplies, stagnant demand, and strong 2025 production point to further growth in peanut stocks, likely pressuring prices lower. USDA reports total planted area at 1.94 million acres, up 8% from 2024, with production forecast at a record 7.25 billion pounds—12% higher, led by Georgia and North Carolina. With usage nearly unchanged, ending stocks for 2025/26 are projected at 2.1 billion pounds, up 25%, signaling a strong bearish trend. (Reported by Georgalos Peanut World)



Keshod have seen bumper sowing, remain below last year. while Gondal and Jetpur crops are progressing well. If weather stays Southern Region:

Crop conditions remain favorable with also reports higher sowing, while temporary ban on Indian peanuts no major damage. Junagadh and Madhya Pradesh and Uttar Pradesh

clear, 39-number quality arrivals In Karnataka, arrivals continue may begin within 20 days. Halvad from Chellakere and Ballari, though reports higher sowing than last year, sowing is 50% lower than last year. with early arrivals expected in 20–25 Fresh arrivals are expected from days. Kutch sowing is average, with mid-September in Hosadurga, Sira, arrivals due in October. Pathavada Hiriyur, Chitradurga, and Davanagere. faced delayed sowing from rains, Andhra Pradesh and Telangana but crops are now healthy, though report steady arrivals supplying arrivals will be slightly late. Overall, Tamil Nadu markets. Tamil Nadu peanut sowing in Gujarat has arrivals are low but sowing will reached 125% of the normal area— expand next month. West Bengal 25% above average—indicating arrivals remain slow due to rains.

strong crop potential. Rajasthan The recent news of Indonesia's could have a significant impact on the Indian peanut market.



Indonesia Indonesia has suspended groundnut/peanut

imports from India following a Non-Compliance Notification on 27 August 2025, a move expected to temporarily lower Indian peanut prices and impact exporters. Meanwhile, Indonesia's peanut market shows low to moderate demand, with buyers focusing on lower price ranges; TJ varieties dominate inventories, 8090 AP at USD 1,400/MT sees weak demand, 8090 Tag/Bengal mix at USD 1,320/MT is in good demand, new 8090 TJ remains limited at USD 1,320/MT, older 5060 TJ trades near USD 1,260/MT, local Bima hybrids are quoted at USD 1,320/MT, in-shells between USD 550-920/ MT, and blanched peanuts range from USD 1,590-1,620/MT.

South Africa 'The South African Crop Estimate Committee projects the country's peanut crop at 61,389 tons on a kernel basis, with 48,125 hectares planted. Weather challenges during the season have led to a higher share of smaller kernels, as the crop experienced a dry spell followed by unusually cool conditions over the final 60 days of growth. Harvesting is nearly complete, with about 99% already taken off the fields. Overall quality is reported to be good, with minimal aflatoxin-related rejections. The peanut market is currently active, supported by steady cross-border export demand.

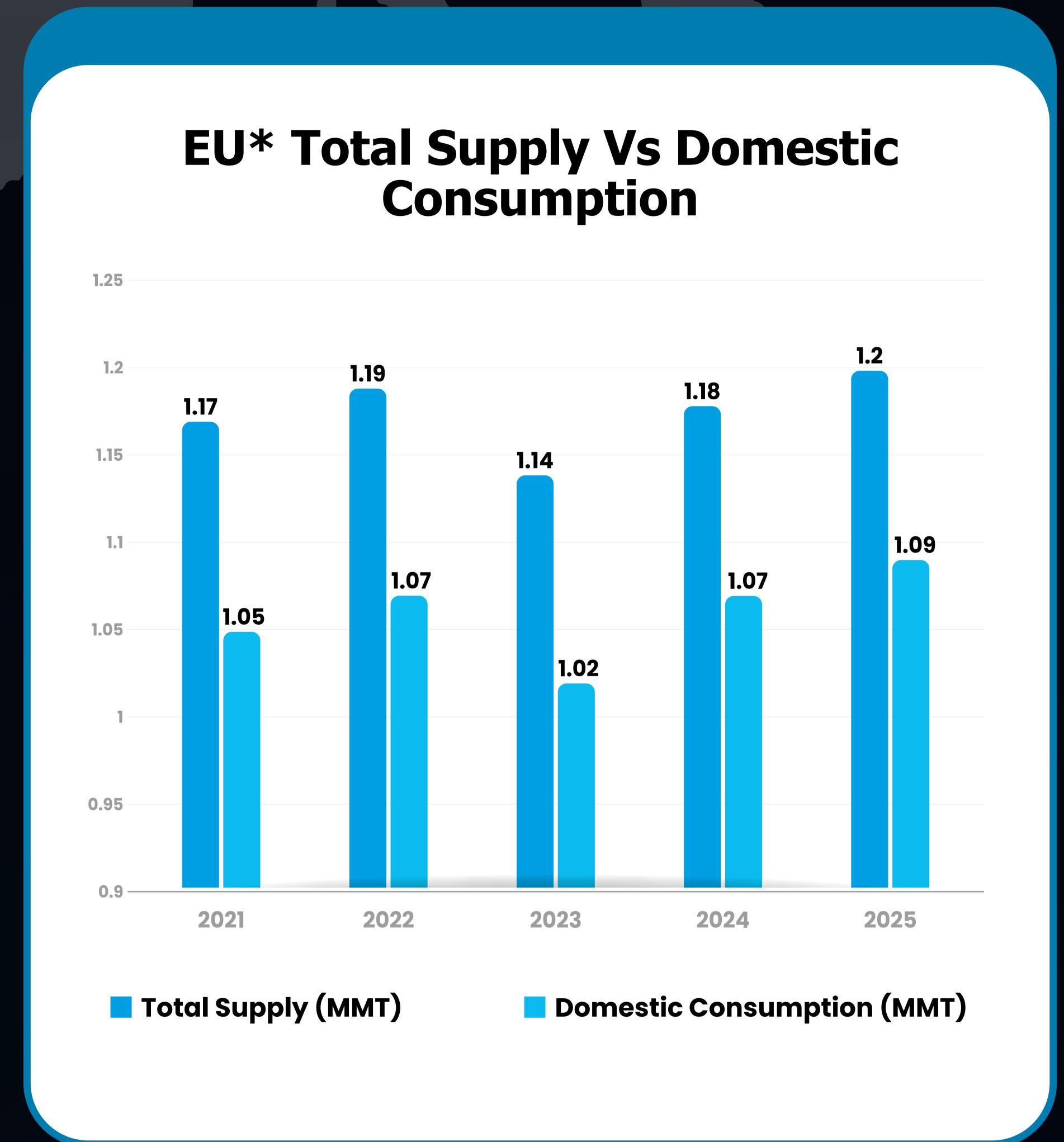
Sudan The price of good-quality Sudanese peanuts at Huangdao Port is currently around USD 1,230/MT.

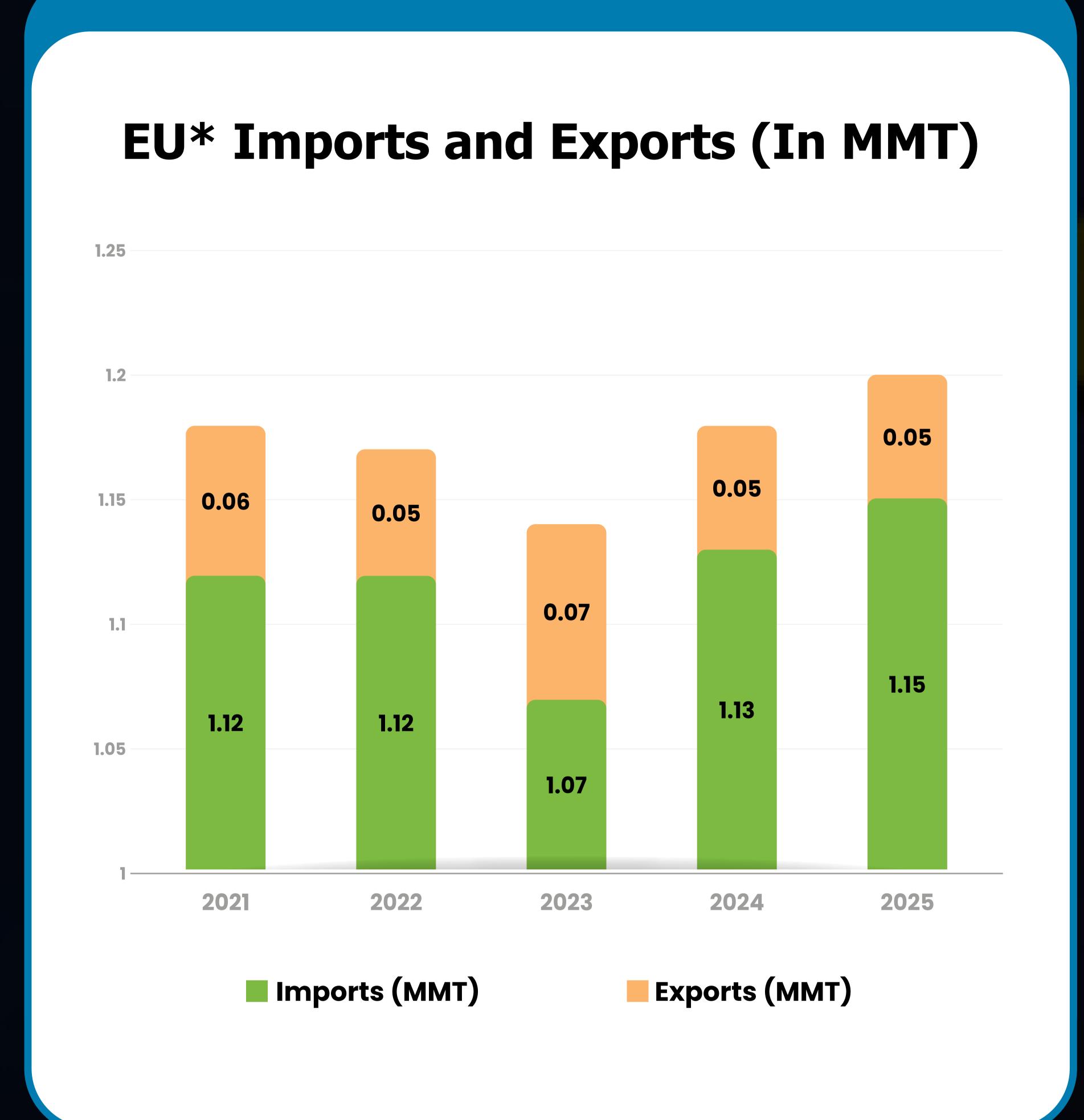


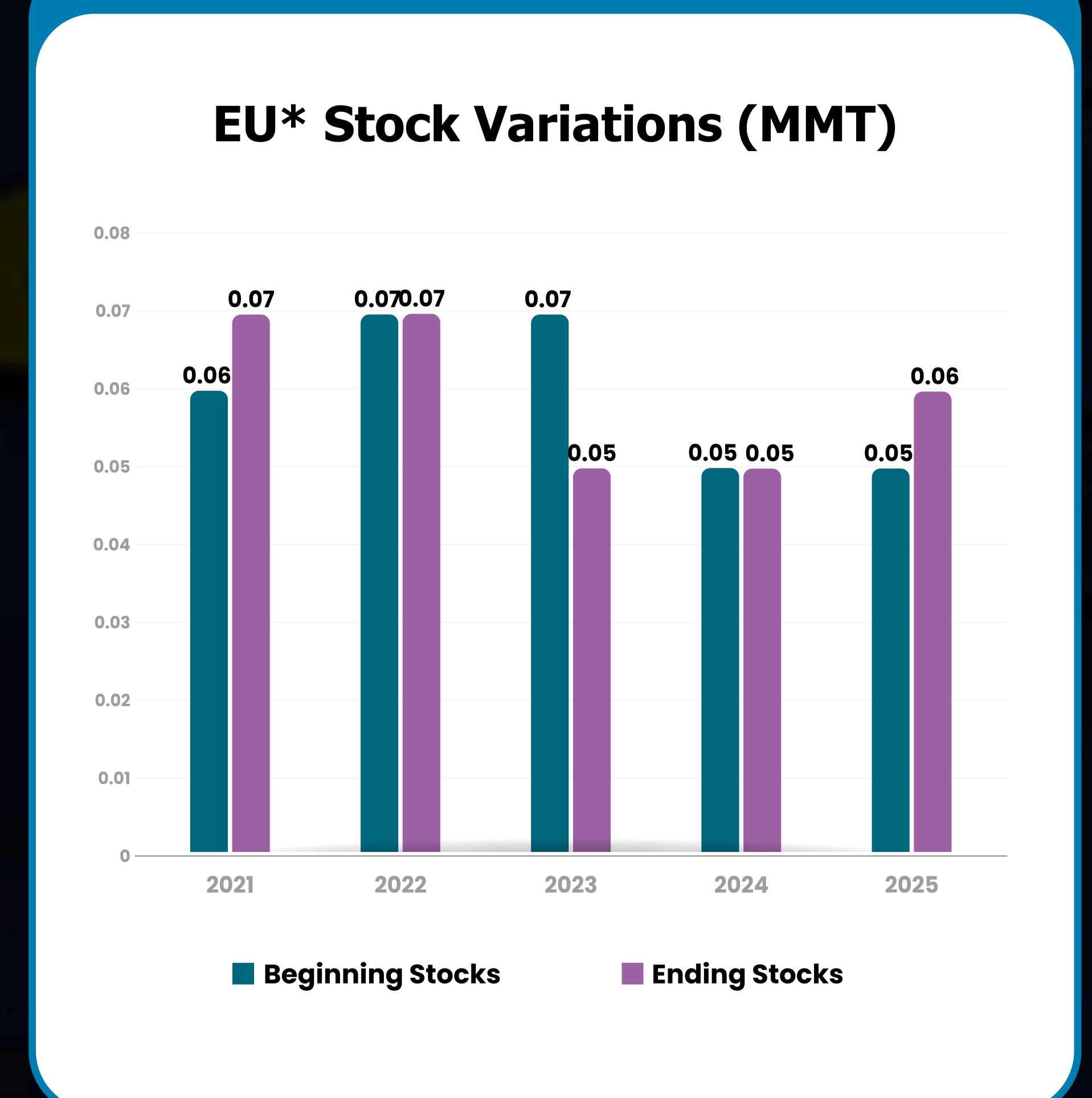
The peanut market faces continued pressure from old stock overhang, with traders lowering prices to clear inventory, weighing on quotes. New crop arrivals are CHINA increasing, but uneven weather has slowed harvesting. In Henan, externally sourced supplies show weak pricing, while high moisture content restricts effective supply. On the demand side, consumption remains sluggish, and traders adopt risk-averse strategies—holding minimal stocks and replenishing only in small batches. Sentiment stays pessimistic, curbing activity. Market dynamics are fragmented, with regional price disparities and mismatched supply-demand. Sellers of aged crops show greater flexibility, but buyers resist amid weak demand. Regional divergence continues, with Henan recording declines and buyers pressing for discounts on high-moisture supplies. Outlook depends on drying progress, festival stocking, and clearance of old stocks. Current prices: Blanched 25/29 at USD 1340 FOB, 29/33 at USD 1270 FOB. (Reported by QingDao JiXing Food)

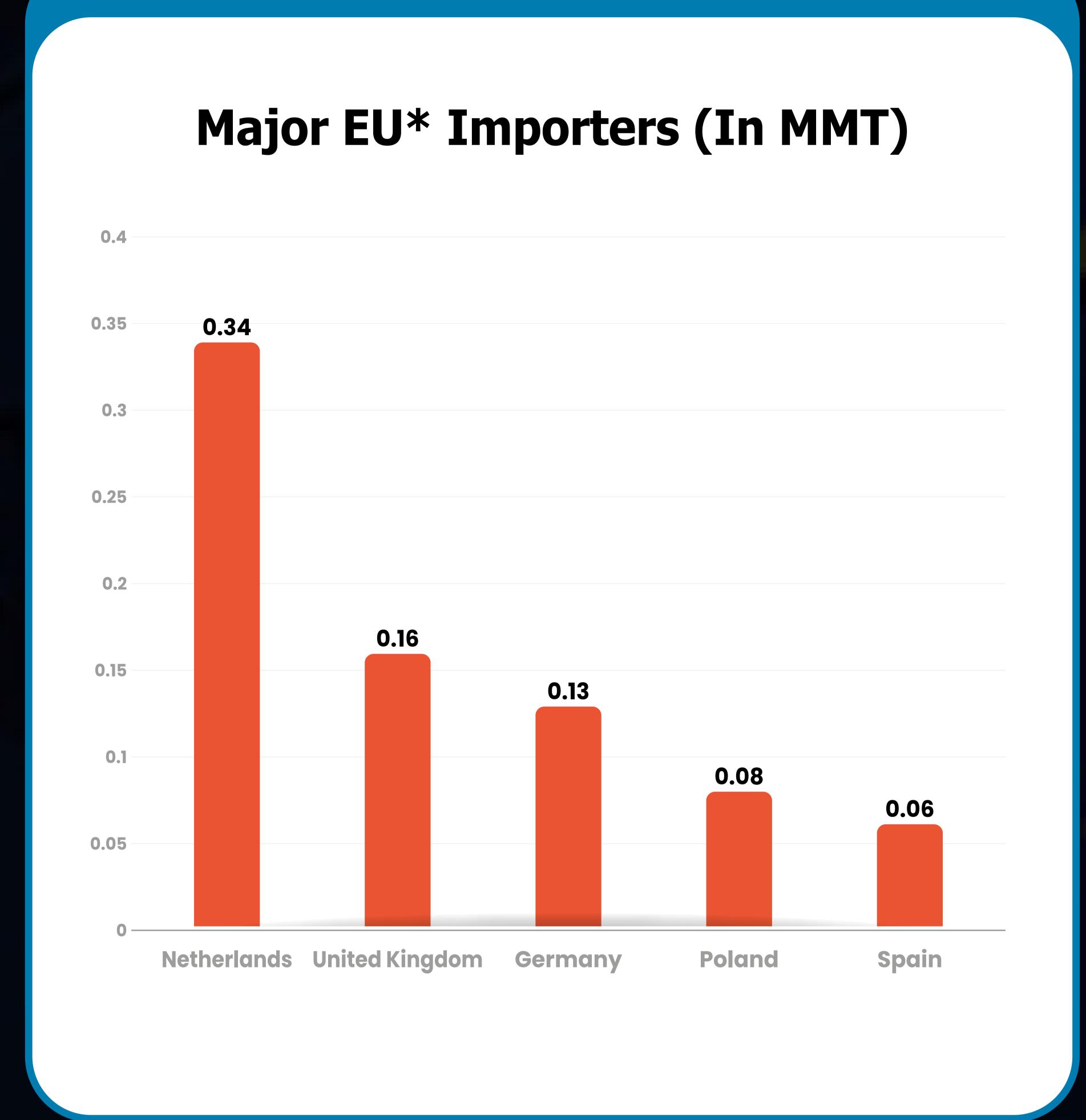
Global Markets P-7 P-6

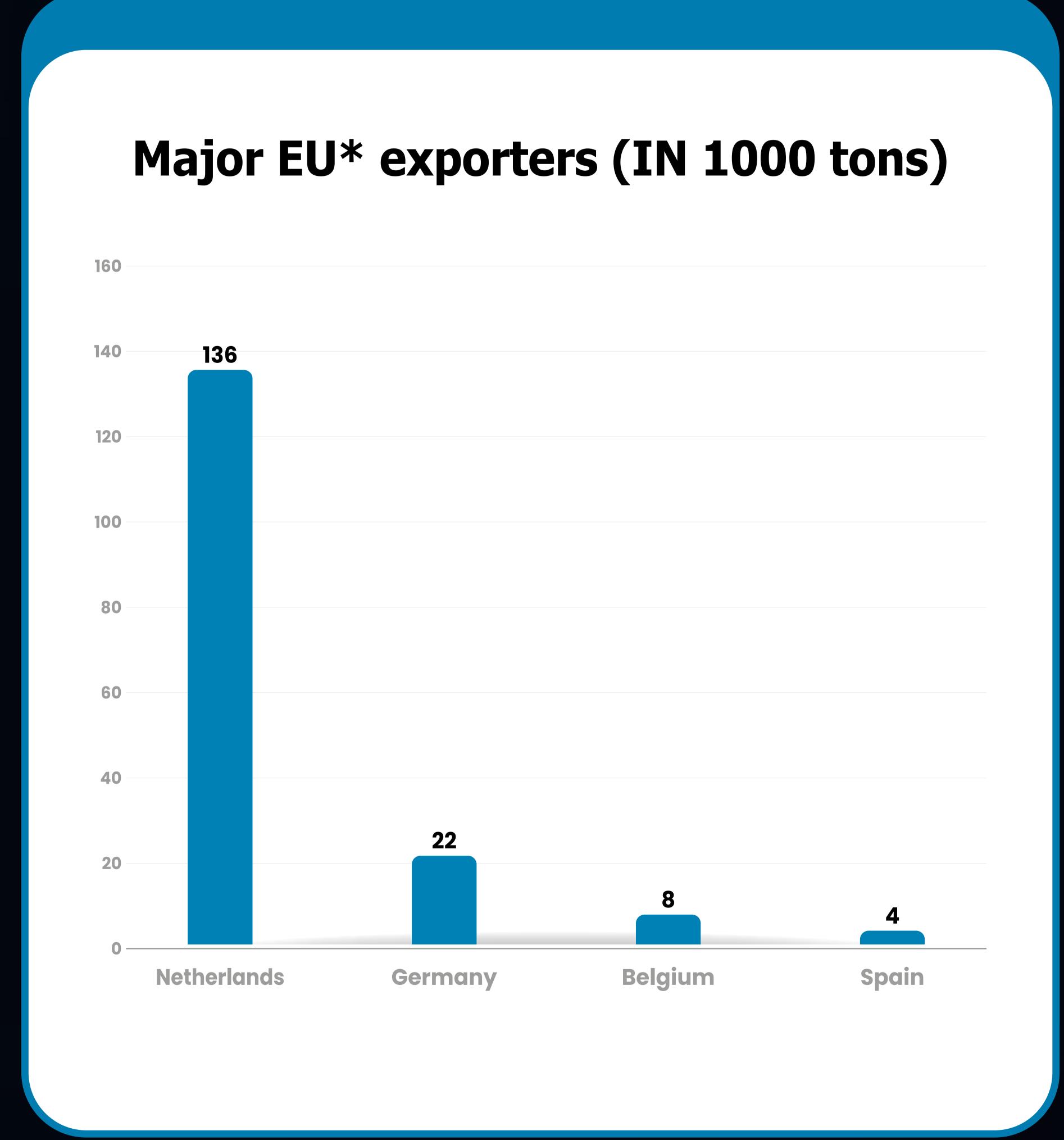
EUROPEAN UNION* - DEMAND & SUPPLY

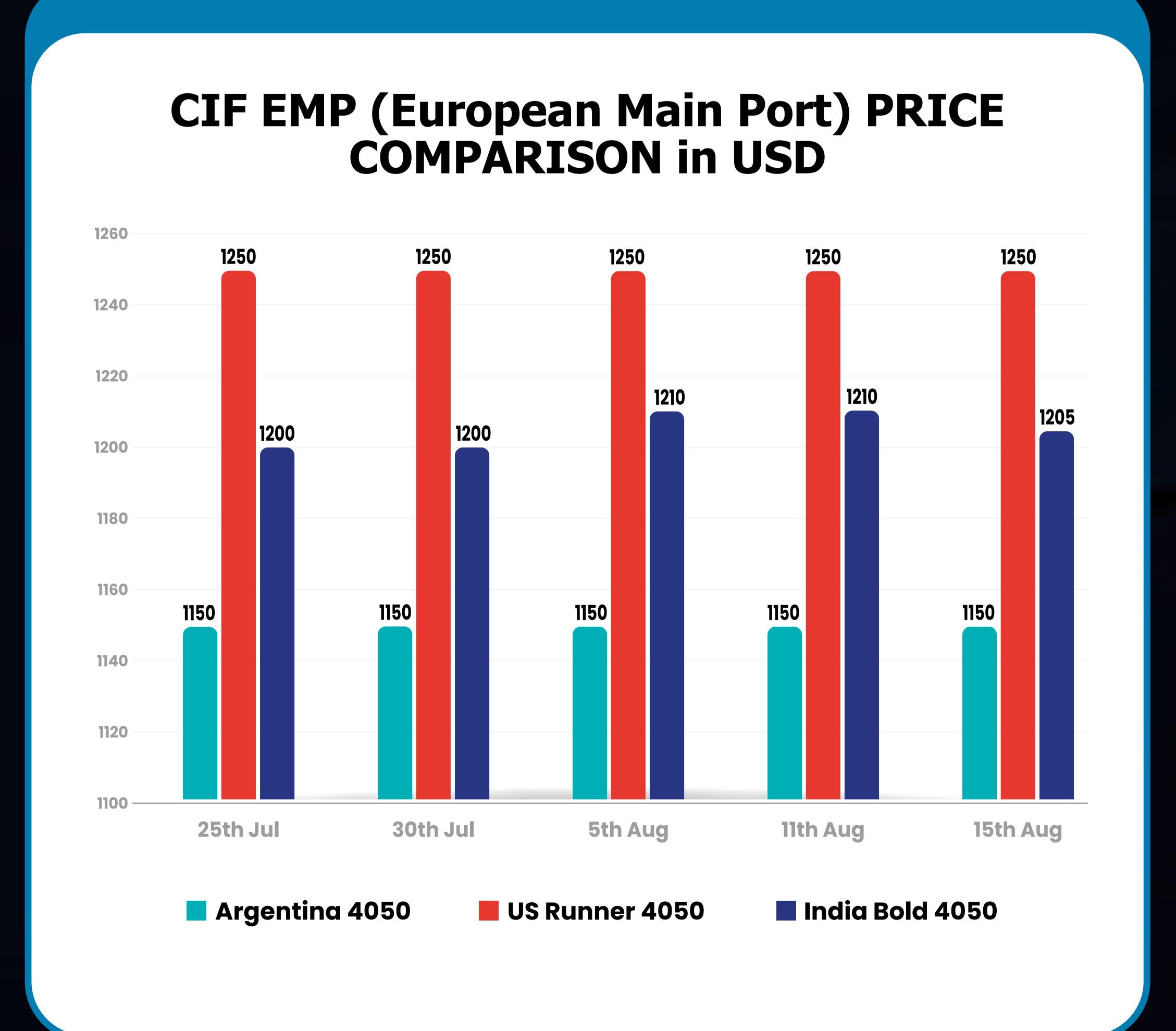


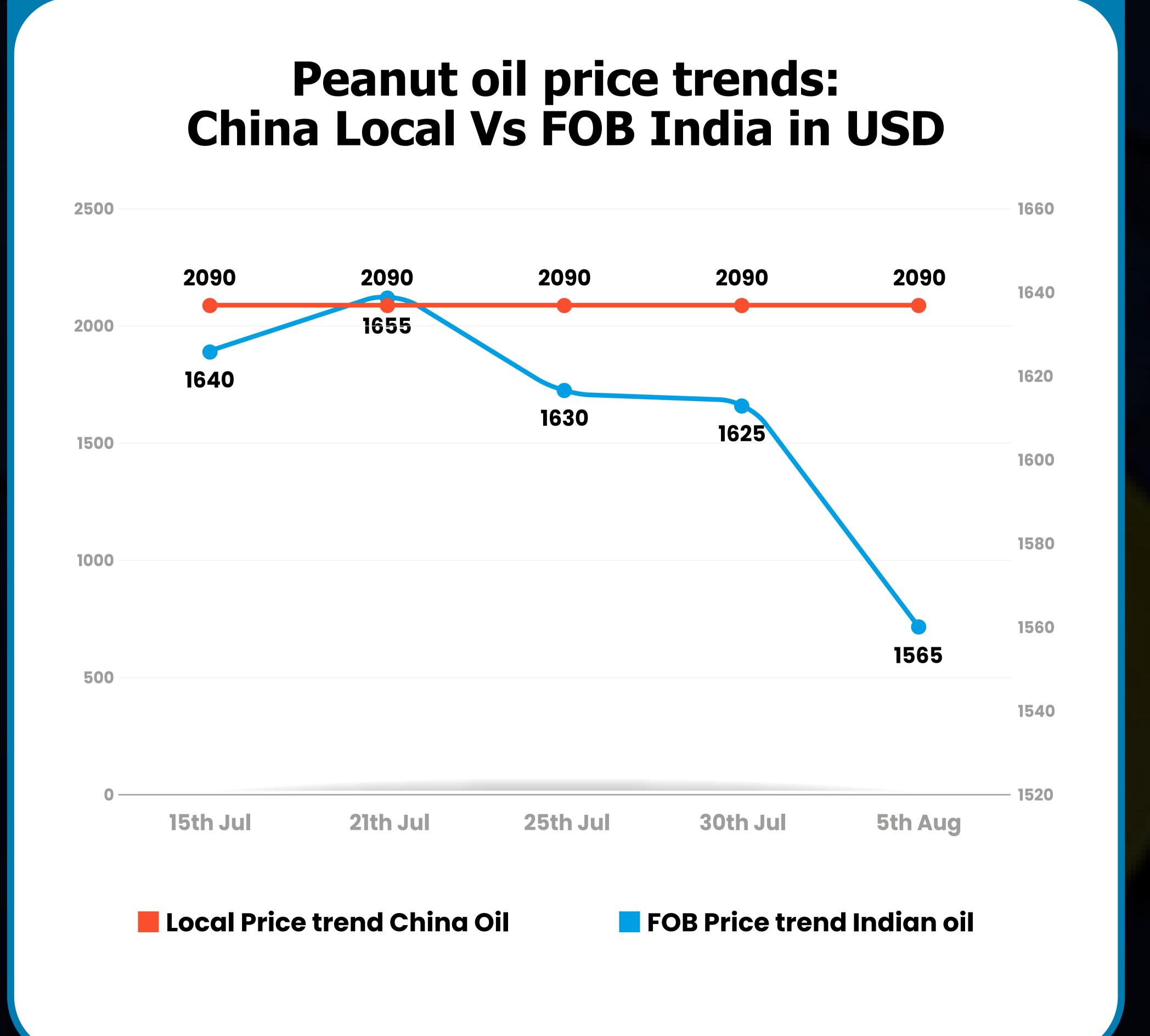












Key Insights

Steady Demand Growth – Domestic consumption shows a slow upward trend (1.05 MMT in 2021 1.09 MMT in 2025), reflecting stable demand across the bloc.

Netherlands as a Hub – Its dominance in both imports and re-exports underscores its role as the central peanut trade hub in the EU.

Tight Stock Levels – Minimal carryover stocks highlight vulnerability to supply disruptions, making diversified sourcing critical.

Opportunities for Exporters – Import reliance and steady demand growth create opportunities for peanut-exporting countries to strengthen their position in the EU market.

* Including Uk and Switzerlands

Gurent Argentina ARG ARG 4050 - \$1150 V BRZ BRZ 3842 BL - \$1350 🛕 CHI 41/51 - \$1380 🗸 Drought and floods reduced yields in Henan and Shandong, while Dongbei's favorable weather supports good harvest. IND TN Java 5060 - \$1445 🛕 Overall, crop conditions are good, with no damage reported. South Africa's peanut harvest is 99% complete, with good quality despite smaller kernels from weather. On August 24, 74% of the nation's peanut crop was rated as being in good to

Peanut harvest in Senegal

is expected to begin in

early September, with

preparations underway.

excellent condition.

SEN - \$NA



I earned a Master's degree from the University of London in 2012 and have over 10 years' experience in global peanut trade, specializing in supply-demand analysis and speaking at industry forums.

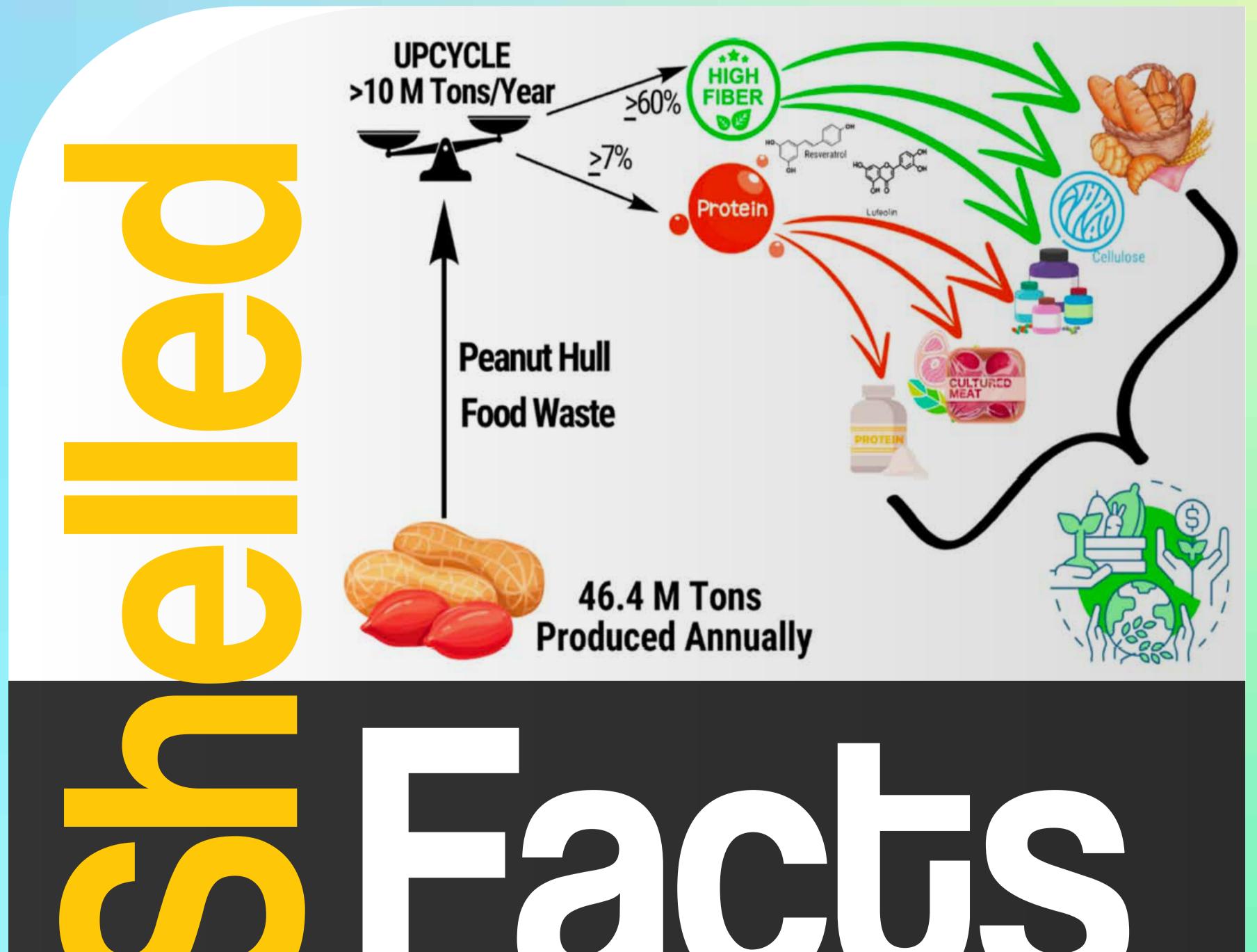
> HE MIAO (KOBE HE) Senior Director BEIJING METAINTL RESOURCES CORPORATION



The current peanut market is showing weakness in both supply and demand. The delayed listing of new peanuts and sluggish demand are restricting each other. However, the harvesting area will continue to expand. Although rainy weather has delayed the listing process, it only temporarily slows the pace of increasing supply and cannot hinder the overall trend of growing supply volume. Market participants generally remain cautious and are waiting for clearer directional signals.

Peanut Hulls: The Untapped Superfood Treasure

Every year, over 10 million tons of peanut hulls are discarded worldwide, wasting more than 6.5 million tons of dietary fiber and 595,000 tons of plant protein. Unlocking this hidden bounty could transform waste into a powerful, sustainable nutrition source.





P - 10 Current Crops P-11

Sensing Quality with A.I.:

E-Nose Odour Detection Smartly Identifies Peanuts' Freshness

Peanut quality can change dramatically during storage, especially when moisture and temperature conditions are not ideal. High moisture can cause oils and proteins in peanuts to degrade, triggering unwanted metabolic activity that leads to rancidity, mould growth, and nutrient loss. These changes are often accompanied by distinctive shifts in aroma, making smell an important quality indicator of freshness and safety.

In a recent study, researchers applied an electronic nose (e-nose) to detect and classify peanut kernel quality over a 10-month storage period. The e-nose works by sensing volatile compounds released by the peanuts and converting these odour patterns into measurable signals. Using principal component analysis (PCA), the peanuts were grouped into three quality levels: high, medium, and low. This classification closely matched results from traditional physical and chemical quality tests, such as oil stability and protein degradation measurements.

To predict peanut quality, the team tested four machine learning models: Support Vector Machine (SVM), Decision Tree, Linear Discriminant Analysis (LDA), and K-Nearest Neighbour (KNN). All models achieved over 90% accuracy in predicting the quality category of peanut samples. This demonstrates that e-nose technology, when paired with advanced data analysis, can be a fast and reliable tool for quality monitoring in storage facilities.

These key aroma compounds form the nutty, green, and fresh character of raw peanuts:

- Hexanal green, oily aroma
- Octanal grassy, citrus-like notes
- Phenylacetaldehyde honey-floral scent
- Acetic acid vinegary sharpness
- 3-Isopropyl-2-methoxypyrazine earthy, green-note character

Beyond this study, such odour-based systems have strong potential for realtime, large-scale quality control in the peanut industry. They could help farmers, processors, and exporters detect early signs of spoilage, reduce waste, and maintain consistent product quality, even under varying storage conditions or across different peanut varieties. As technology advances, integrating e-nose sensors with automated storage monitoring systems could become a key step toward smarter, safer, and more sustainable peanut supply chains.

Reference: Wang, Y., Shi, B., Zhao, L., Tian, S., Zhong, K., & Wang, H. (2023). Study of peanut kernel storage quality discrimination based on odor pattern. Research Square (Research Square). https://doi.org/10.21203/rs.3.rs-2947957/v1

With Thanks to Our

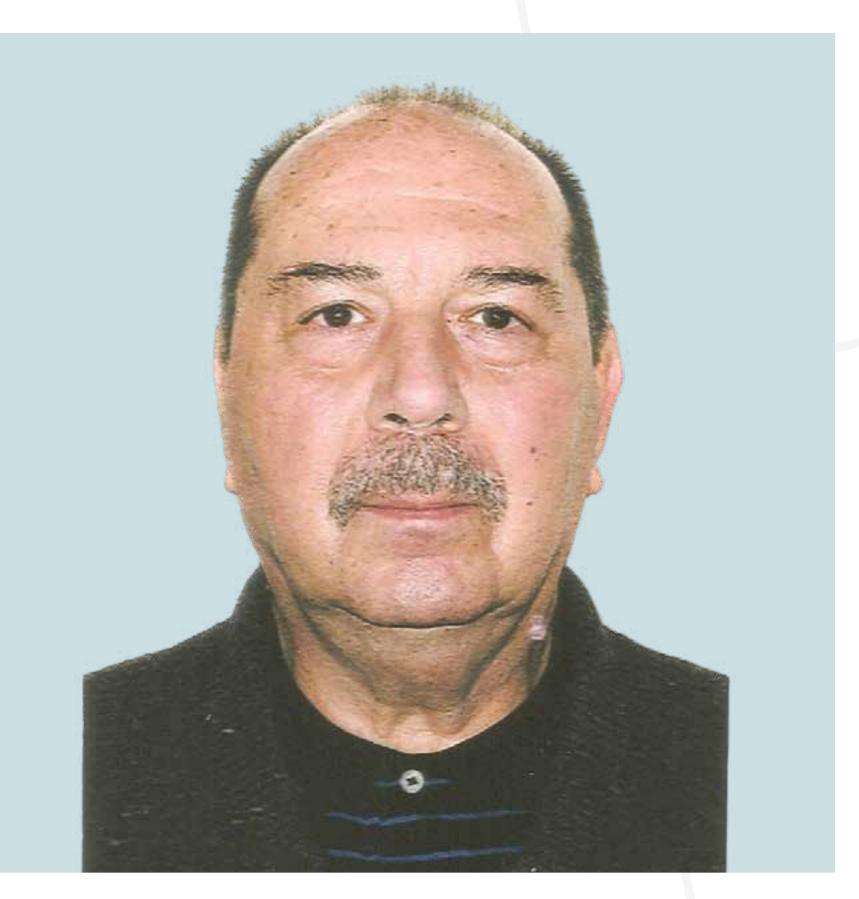
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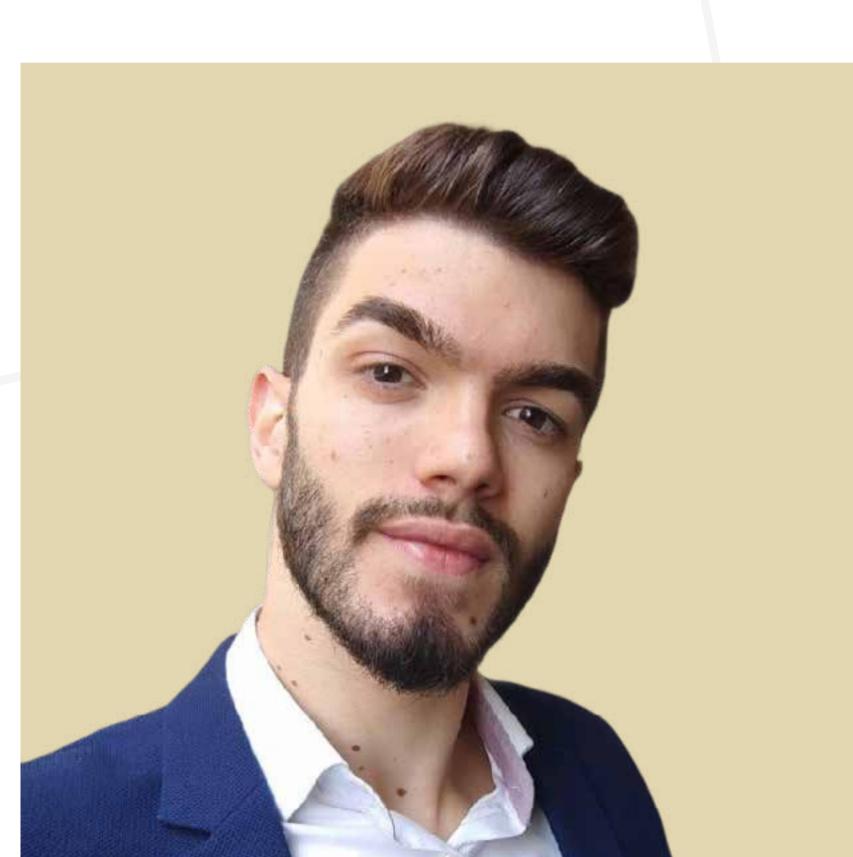


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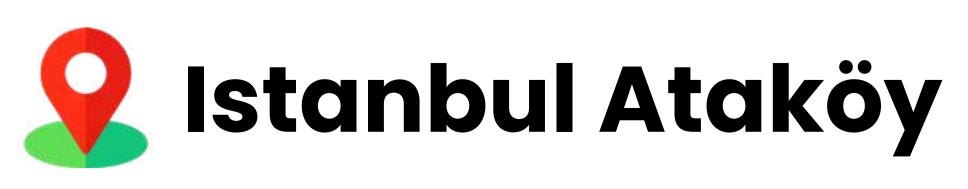




Upcoming Events



5-7, September 2025



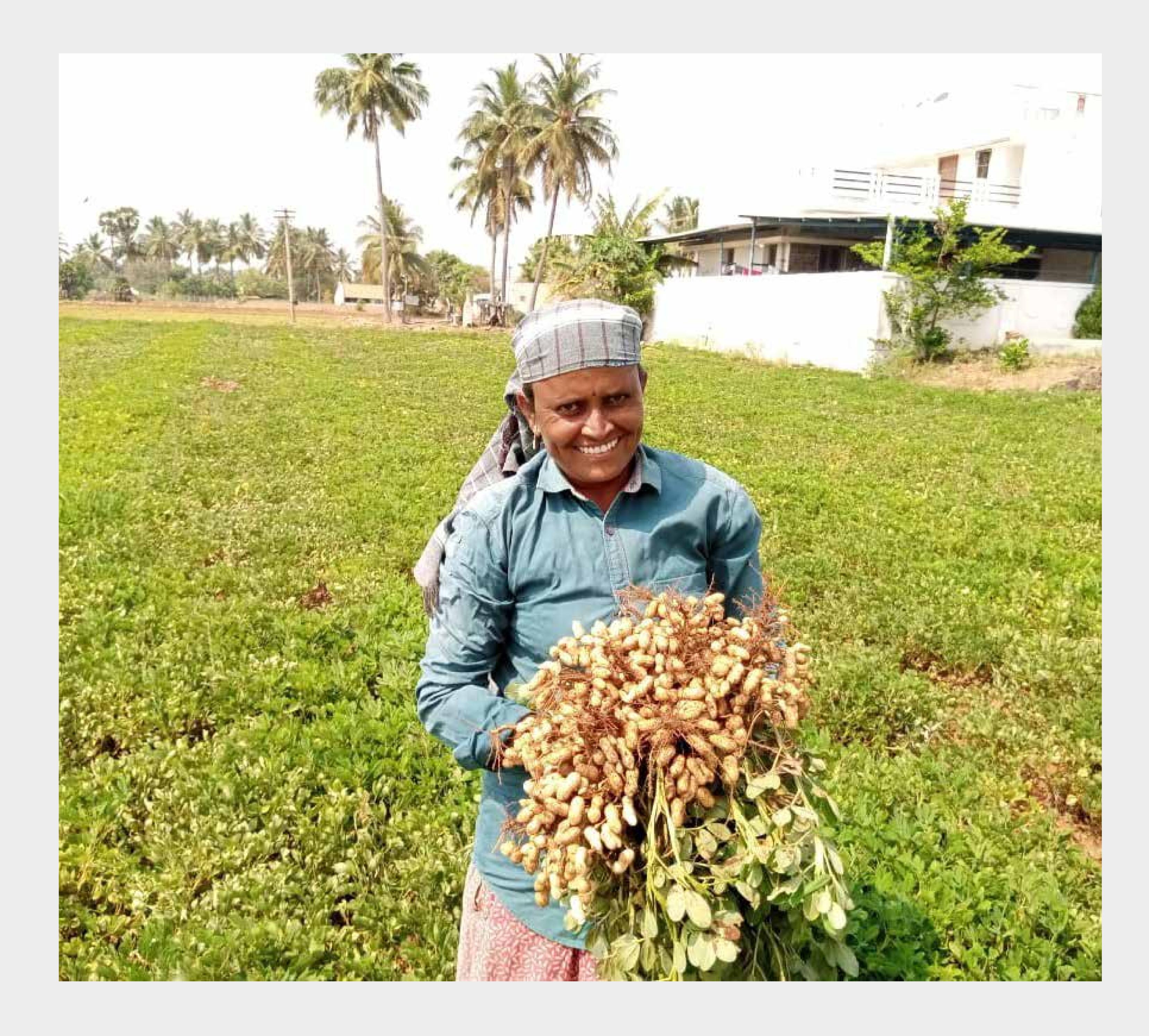


P-12 Quality Science Contributors Spotlight P - 13

SUSTAINABILITY

The Future is Hi-Oleic: Healthier Peanuts, Longer Shelf Life, Smaller Footprint

In the peanut world, one variety is making a quiet revolution—hi-oleic peanuts. Packed with heart-friendly monounsaturated fats like those in olive oil, they offer a triple advantage: healthier nutrition, extended freshness, and a lighter environmental impact. A simple genetic twist, delivering taste, health, and sustainability in every crunchy bite.



Healthier by Nature

Oleic acid isn't just a buzzword. It has been linked to cardiovascular benefits, improved cholesterol profiles, and better oxidative stability in foods. Hi-oleic peanuts typically contain 75–80% oleic acid, compared to 50–55% in standard varieties. This means snackers get a healthier fat profile without sacrificing taste — in fact, many say the flavor is even richer and fresher.











Fighting Food Waste with Shelf Life

One of the biggest hidden advantages of hi-oleic peanuts is their resistance to rancidity. The higher oleic acid content slows oxidation, keeping peanuts fresher for up to 10 times longer than conventional varieties. Fewer returns for producers, longer shelf life for stores, and fresher peanuts for consumers — meaning less waste for everyone.

A Sustainable Choice for Farmers and the Planet

From a farming perspective, hi-oleic peanuts command premium prices in many export markets, particularly in Europe and Asia, where demand is growing rapidly. This creates an incentive for farmers to invest in sustainable cultivation practices, from precision irrigation to reduced pesticide use. Longer shelf life also reduces the environmental cost of food spoilage — fewer shipments are discarded, cutting the embedded carbon footprint of peanut production.

Meeting Market Demand

Global demand for hi-oleic peanuts is expected to grow steadily as more brands reformulate products for cleaner labels and longer freshness. From peanut butter to snack bars, hi-oleic peanuts allow companies to deliver on both taste and sustainability promises without relying on artificial preservatives.

The Takeaway

Hi-oleic peanuts prove that innovation in agriculture doesn't always require high-tech labs or radical new crops — sometimes, it's about optimizing what nature already provides. By improving nutrition, extending freshness, and supporting farmer livelihoods, they're more than a nut — they're a blueprint for a healthier, more sustainable food future.

Sustainability P - 15

BIRD FEED

THE RISING ROLE OF PEANUT FLOUR IN MODERN BIRD FEED PRODUCTS

In the evolving bird feed industry, peanut flour is gaining prominence as a versatile, high-performance ingredient, particularly in formulated products such as suet cakes, fat balls, pellets, and high-energy blends. Once considered a secondary by-product of oil pressing, it is now recognized as a driver of innovation and quality in premium bird feed formulations.



Nutritional Composition and Benefits

Peanut flour typically contains 45–55% protein, 10–15% residual fat, and a balanced amino acid profile, particularly rich in arginine and glutamic acid. Its defatted nature reduces excessive lipid content while retaining key fatty acids and micronutrients such as vitamin E, magnesium, and niacin. For birds, this translates into:

- High digestibility smaller particle size improves absorption.
- Sustained energy residual fats provide slowrelease calories.
- Support for growth and breeding essential amino acids contribute to feather quality, egg production, and chick development.

Compared to whole peanuts, peanut flour is safer for small passerines that cannot easily process large nut kernels.



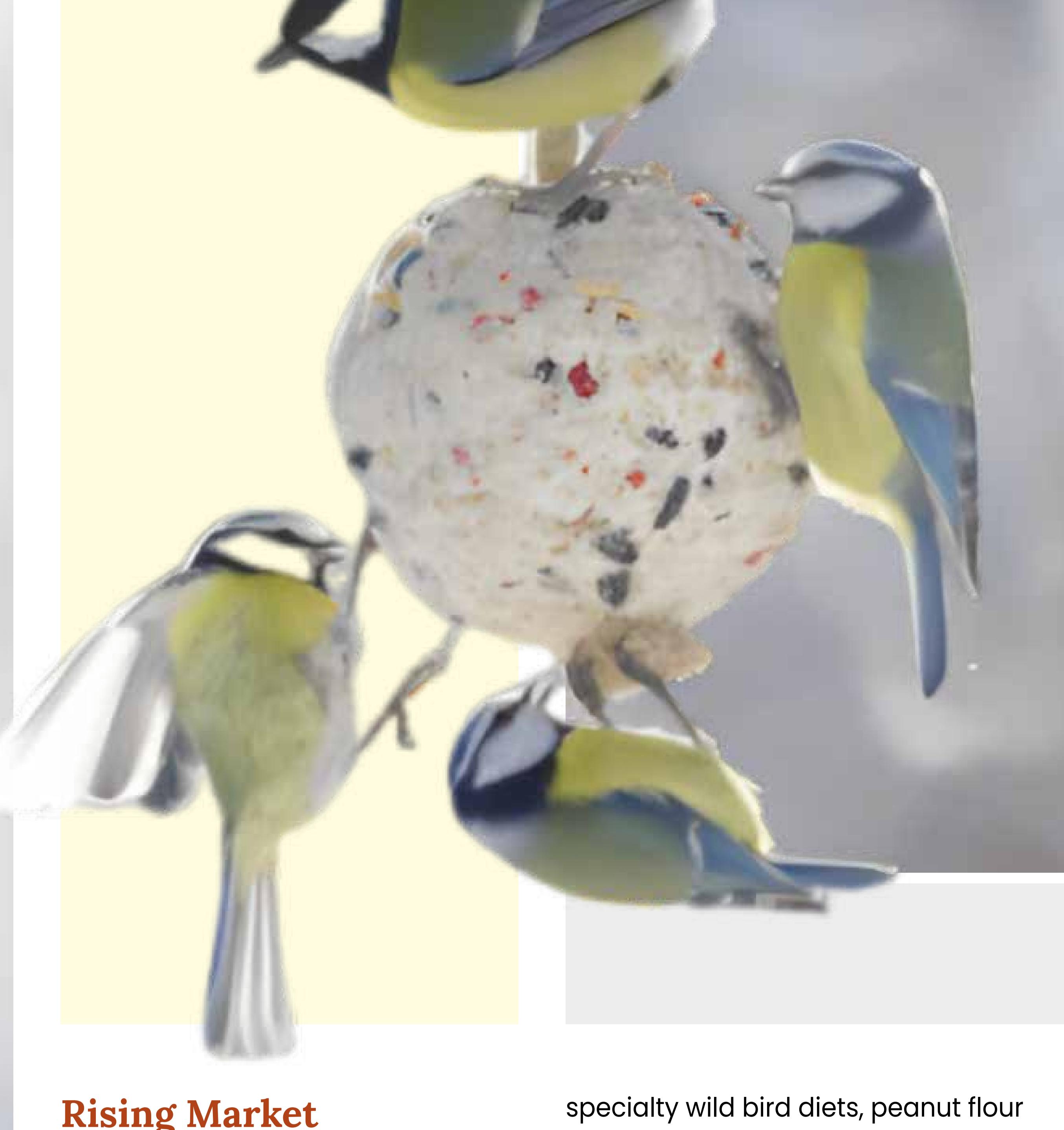
Applications in Bird Feed Products

The functional properties of peanut flour make it adaptable across various product formats:

- Suet and fat blocks

 acts as both a
 binder and nutrient
 enhancer.
- Extruded pellets and crumbles improves formulation homogeneity and pellet stability.
- High-energy winter feeds provides concentrated nutrition for migratory and overwintering birds.

Peanut flour's binding capacity and fine particle size allow it to integrate seamlessly with other feedstuffs such as maize meal, soy protein, and mealworms.



Rising Market Significance

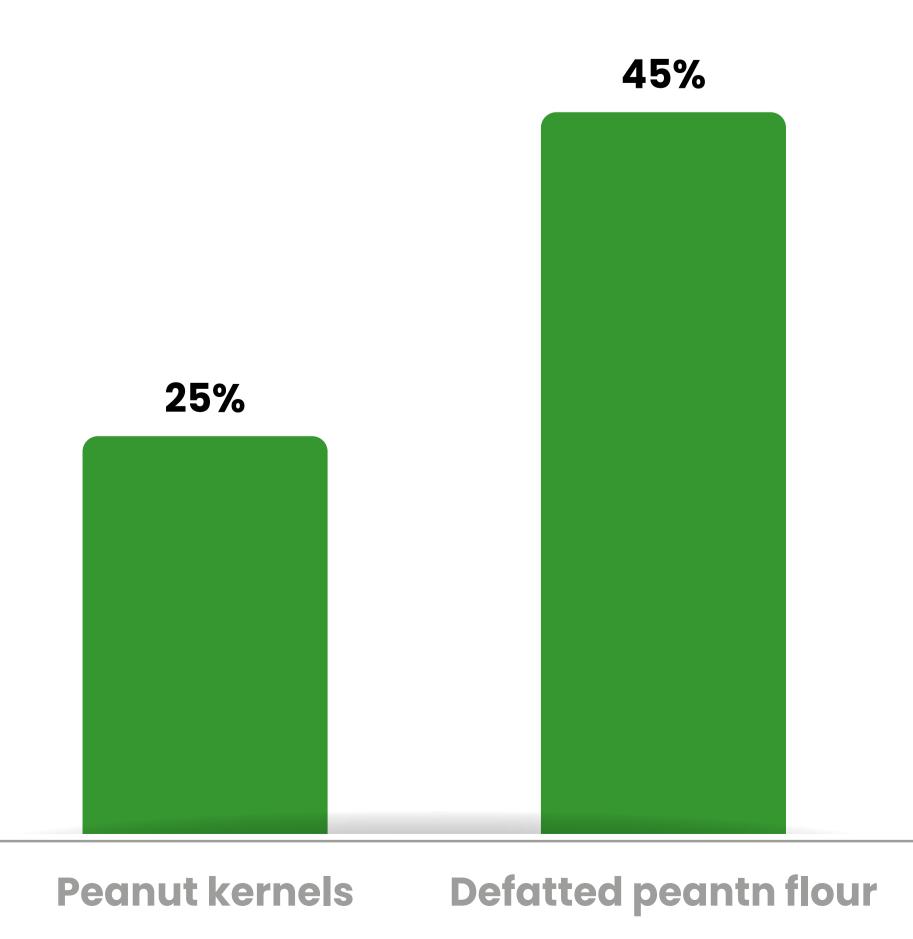
The growing popularity of backyard bird feeding in Europe and North America has fueled demand for premium, nutritionally balanced products. Peanut flour is increasingly used to differentiate formulations, providing higher protein levels than conventional fillers such as wheat middlings or maize meal. Manufacturers highlight it as a valueadded ingredient on packaging, signaling quality to consumers.

Toward Next-Gen Nutrition

With rising consumer interest in

is expected to expand its role across product categories. Its combination of nutritional density, functional performance, and sustainability positions it as a cornerstone ingredient for next-generation bird feed products, from high-energy suet cakes to fortified pellets.





- 16 Bird Feed P - 17

Insight into a New Contender in the Alternate Protein Sector

Peanuts are a rich source of plant protein, but not all of that protein is easy for our bodies to digest. Researchers explored whether fermentation, a natural process using beneficial bacteria, could make peanut protein more available and nutritious.

In this study, peanuts were cooked, blended with water into a smooth slurry, and fermented for 48 hours at 38 °C. Two types of food-safe bacterial cultures were tested:

- Propionibacterium freudenreichii(often used in cheese-making)
- A fresh cheese starter containing several Lactococcus and Leuconostoc strains

The fresh cheese culture alone gave the best results. It increased how easily the protein could be digested and improved the balance of amino acids, the building blocks of protein. This improvement is linked to the bacteria's natural enzymes, which break down proteins into smaller, more absorbable parts.

Such fermentation not only boosts nutrition but also softens texture, opening opportunities for new peanut-based products such as high-protein drinks, spreads, or specialised dietary foods. With plant-based protein demand rising worldwide, this approach could create a higher-value use for peanuts, especially in markets looking for sustainable, affordable alternatives to soy and pea protein.





Illustrative picture of peanut-based fermented slurry.



Illustrative image of a peanut bar made from fermented peanut protein.

In short, fermentation may help peanuts step into a new role, not just as snacks, but as a key ingredient in the future of plant-based nutrition.

Reference: Saizen, A., Stipkovits, L., Muto, Y., & Serventi, L. (2023). Fermentation of Peanut Slurry with Lactococcus lactis Species, Leuconostoc and Propionibacterium freudenreichii subsp. globosum Enhanced Protein Digestibility. Foods, 12(18), 3447.

https://doi.org/10.3390/foods12183447

P-18

Peanut-Derived Biofuel

Peanuts converted into advanced biofuel deliver renewable power for machinery and mobility, driving a low-carbon, future-ready energy transition.

