PEANUT POST

OCT 2025

98 VOLUME

THE GOLDEN HARVEST INDIA

Global Markets P6

Bird Feed P16

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MARKET HIGHLIGHTS

SUPPLY

India

India is heading towards a record peanut crop (12 million tons) that is both healthy and diverse, with strong availability across TJ, Java, Bold and other varieties. Prices are currently on a declining trend due to weak demand from Southeast Asian markets, though domestic consumption—supported by the festive season—continues to provide stability.

The government is also supporting growers through the Minimum Support Price, set at USD 820/ton, representing an 7% increase over the previous MSP.

In terms of pricing:

- Bold new crop is trading at USD 950–1,050/ton, depending on aflatoxin specifications.
- Peanut oil remains stable at USD 1,500–1,550/ton for 2% FFA.

Our earlier expectations of a price correction have already materialised, and we anticipate prices to remain stable without further deterioration in the near term.

China

Local prices have stabilised, forming a strong base. However, crops from Henan province are reporting high aflatoxin levels due to prolonged rains, flooding, and adverse harvesting conditions. Green kernel patterns are now emerging in both Henan and Shandong, with future outcomes largely dependent on rainfall in the coming weeks.

In contrast, crops in Dongbei—often referred to as 'Little Japan'—remain intact and are highly sought after for their consistently low aflatoxin levels.

Current stock prices vary significantly: crushing material ranges between RMB 6,000–8,000 per ton with FFA levels of 2–4%, while blanched peanuts are available from USD 1,175 per ton for size 25/29.

The China market will close for Autumn Festival holidays from 30 September until 9 October 2025.

Argentina

Local demand for larger kernels such as 30/35 and 38/42 has increased, with suppliers who sold forward now facing shortages. This has helped stabilise price momentum.

Crushing grades are trading between USD 700–800/ton, while oil prices remain steady at USD 1,500–1,550/ton on a CFR basis. Ample bird feed material is available, along with 2024 stocks in raw, blanched, and crushing grades.

Looking ahead, prices may turn bullish as many markets have yet to fully cover their volumes, having anticipated further declines—corrections that have already taken place.

DEMAND

Indonesia

Prices in Indonesia have surged from IDR 19,500 to IDR 27,000 per kg and may soon approach IDR 30,000 per kg. Despite this sharp increase, demand remains moderate as the Indonesian government continues to rely on Indian peanuts. Current supply is being met mainly through local crops, existing stocks, and limited arrivals, while Africa is contributing very little at this stage.

If the ban on Indian peanuts is lifted on 1 November 2025, the situation could quickly stabilise and return to normal. Until then, Indonesia faces a period of tight supply and heightened demand, which is expected to continue through to Ramadan next year.

China

The Chinese market has seen extremely low import and domestic demand during the Autumn Festival break. Post-holiday demand will likely depend on domestic harvest conditions.

During this period, demand for other commodities such as raisins, cumin, rice, and sesame also fell sharply. In peanuts, indicative levels were: peanut oil at USD 1,400/ton, crushing material at USD 750–800/ton, and 40/50 kernels at USD 900/ton. With such weak purchasing power, only a limited number of deals were concluded. Some demand at these levels was met by Brazilian supply.

Thailand

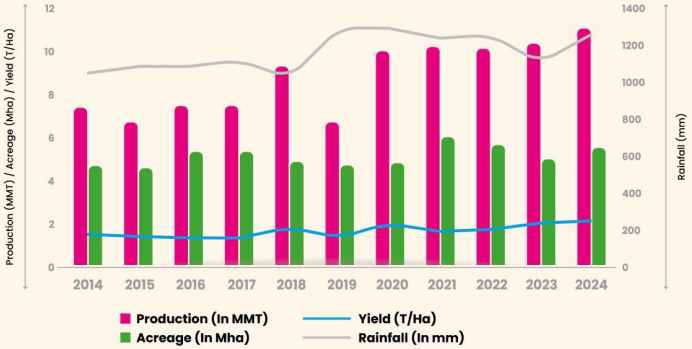
The market remains undersupplied, relying heavily on Myanmar, Cambodia, and China for supplies, with some volumes also coming from Vietnam. Purchasing power has risen from USD 1,200 to USD 1,500, but the shortage of quality material—particularly aflatoxin-cleared Java (Spanish) peanuts—continues to weigh on the market. The introduction of the new plant quarantine protocol has further added to the challenges of meeting demand.

PEANUT WIZARD

Action time is near for India's largest peanut harvest, with 11-12 million tons (in-shell basis) set to feed over 1.5 billion people — with Gujarat alone eyeing a historic 6.6 MMT this year. Will this year's crop be golden?

Trends in India's Peanut Acreage, Yield, Production, and Rainfall

(2014-2024)



India

The Indian peanut sector grew at a CAGR of 4%. This growth was largely driven by higher yields, supported by favorable rainfall patterns and a marginal increase in acreage. What makes peanuts the star crop?

The Indian Peanut Calendar

Province	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
(W) Gujarat						P	P	G	G	H	H	
(W) Rajasthan						P	P	G	G	H	H	
(W) Andhra Pradesh						P	P	G	G	H	H	
(W) Karnataka						P	P	G	G	H	H	
(W) Tamilnadu			P	P	G	G	H	H				
(S) Gujarat	P	P	G	G	H	H						
(S) Rajasthan	P	P	G	G	H	H						
(S) Andhra Pradesh	G	G	H	H							P	P
(S) Karnataka	G	G	H	H							P	P
(S) Tamilnadu	G	G	H	H							P	P
(S) Orissa	G	G	H	H	H						P	P

(W) Winter Crop (S) Summer Crop
(P) Plant (G) Grow (H) Harvest

India is the world's largest peanut producer and one of the few countries able to grow two or more crops in a single calendar year. This is made possible by its combination of micro-farming practices and favourable macro-level weather conditions."

- A staggering 5 MHa are dedicated to peanut cultivation—an area comparable to the size of Switzerland.
- Peanuts are grown across 11 states in India, spanning North, South, East, and West, with new states adopting cultivation at a rapid pace.
- India's growth story is closely linked to rising domestic consumption, as only 9% of the harvest is exported.

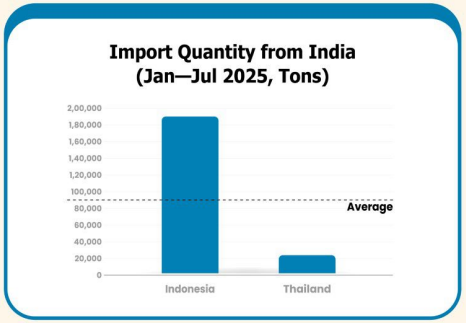
Trade partners of India:

India is strategically positioned to serve a wide spectrum of customers. With 90% of peanuts consumed domestically—driven by GDP growth of 7.8% and rising per capita consumption—the local market continues to expand. On the global front, external trade is concentrated among just five key partners: Indonesia, Thailand, the Philippines, China, and Vietnam.

Pie chart showing the share of these 5 countries in India's total exports.

Except for China, most markets are currently understocked—including Indonesia and Thailand, which face an acute shortage of Spanish-type peanuts. Alternative suppliers such as Sudan, Tanzania, and Mozambique are also unable to provide stable supply.

This scenario positions the market for a potential 'bull' phase, though it remains contingent on regulations, quality compliance, and several critical 'ifs' and 'buts'.



Factors influencing Indian Peanut sector

India is a diverse and complex nation, with over 122 major languages, 6 regions, and 28 states—making execution inherently challenging. Three key factors shaping the peanut sector are outlined below:

- **Politics:** The Minimum Support Price (MSP) plays a critical role, especially in electoral years. The next general election is due in 2029.
- **Finance:** Foreign exchange and the cost of finance are highly sensitive drivers for the peanut industry. In 2025 YTD, forex movements have been 6%, while interest rates remain stable at 8–11% per annum.
- **Rainfall:** As an agrarian economy, approximately 18% of India's GDP comes from farming, with over 59% of its land under cultivation. Rainfall remains decisive, and in Indian tradition, the rain god is revered as Varuna."

A Golden Harvest?

In conclusion, India's 2025 peanut harvest is shaping up to be golden, provided regulatory compliance and quality standards are fully met.

Global Markets

ARGENTINA

The 2025 peanut crop shows an abundant supply of good-quality peanuts, but there is a shortage of 38/42 sizes. Shippers and exporters are facing challenges balancing finance, storage, vessel availability, and production capacity. According to SAGyP, Argentina's peanut planting intention for 2025/26 is 470,000 hectares, 11.3% lower than last season. The Argentine Peanut Chamber (CAM) projects only 389,560 hectares. GEORGALOS PEANUT WORLD (GPW) anticipates that if the decrease is confirmed at 11.3%, low prices may persist through the October 2026–September 2027 marketing year. However, if the planting area drops by 27% as CAM suggests, production would decline significantly, initiating a balance in edible peanut supply and demand (EU specs) for the EU market in the 2026/27 marketing year. (Reported by Georgalos Peanut World)

BRAZIL

The peanut market remains sluggish, with China reducing its demand while growers prepare land for planting. A significant drop in planted area is anticipated. Farmer-held stocks remain at similar levels, with limited movement of peanuts. At a recent lecture on peanut exports, I spoke with numerous growers. Nearly all indicated plans to cut their planting area by 20–40%, despite cultivation costs having fallen by 20–30%. Some noted that by October, when planting concludes, landowners often accept lower rents to secure tenants. Seed producers also report a sharp decline in sales compared to last year. The contraction in planted area now seems inevitable; the uncertainty lies only in the extent. In Europe, demand remains muted, though limited buying could emerge. Russia, once expected to increase purchases, has also been slow. China, previously the most active buyer, has scaled back imports with the start of its domestic harvest. This slowdown is particularly critical for Brazil, which has become heavily reliant on China. In August alone, over half of Brazil's kernel exports went there, alongside 12,000 tons of peanut oil. The coming months will reveal how sharply Chinese demand falls—and how strongly prices respond. (Reported by Samtraco)

USA

The 2025 peanut crop is strong, with record-high production of 7.4 billion pounds—15% above 2024—driven by higher yields and expanded acreage, especially in Georgia and Texas. Harvested area rose to 1.9 million acres, with a national yield forecast of 3,890 pounds per acre. Georgia planted over 900,000 acres, the most in nearly 30 years. However, falling prices, oversupply, and weak exports challenge farmers. While irrigated peanuts show good potential, dryland crops now struggle from lack of late-season rainfall. (Reported by Georgalos Peanut World)

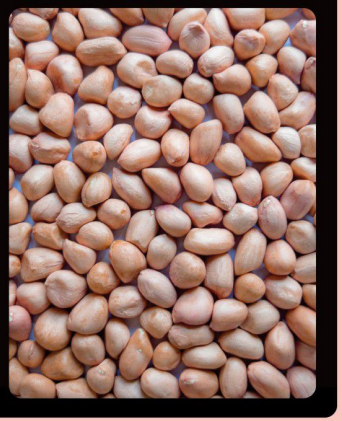
PEANUT SPOTLIGHT

INDIA

In Gujarat, peanut arrivals have begun, with G20 Bold expected to enter harvest within ten days and Pathvada TJ arrivals still slow but likely to improve within a week. Current arrivals are mostly high in moisture, though lower-moisture produce is expected soon as open weather continues. Gujarat's production is estimated at 66 lakh tons, nearly 25% higher than last year, indicating a bumper crop.

In Rajasthan, sowing is up 8% from last year with healthy crop conditions and no damage reported. Steady arrivals are expected within ten days. Trading is focused on high-moisture lots, while sentiment stays bearish amid new export rules, stricter satellite monitoring, and prospects of a bumper crop.

In the South, Tamil Nadu arrivals are nearly closed with only 200–300 bags in Alangudi, forcing traders to source from Gujarat and Rajasthan. Post-Diwali, sowing demand will begin. Telangana sowing is almost complete, including K6, while Anantapur and Chittoor arrivals may continue for another month. Karnataka arrivals from Chitradurga and Hiriyur remain limited, though domestic demand is strong with the Oil Federation active. In West Bengal, the crop is nearly finished, with red seed arrivals in their final stage.



OTHER'S

Indonesia During the last week of September, most importers offloaded stocks at USD 1,320–1,350/MT amid softening demand. Once second-tier buyers re-enter the market, prices may rebound. 8090 Java is scarce and quoted at around USD 1,500/MT, while 8090 Tag & Kadiri moved swiftly at USD 1,325/MT. 8090 TJ (old crop) traded at USD 1,350–1,380/MT, and 5060 TJ remains with major importers at USD 1,470/MT. Several containers continue to face rejection for high aflatoxin levels and are being re-exported to India.

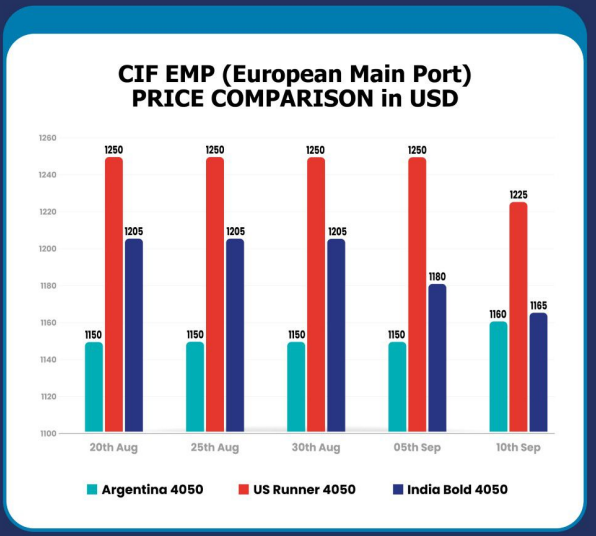
Sudan High-quality Sudanese peanuts currently trade at around USD 1,220 per metric ton at Huangdao Port.

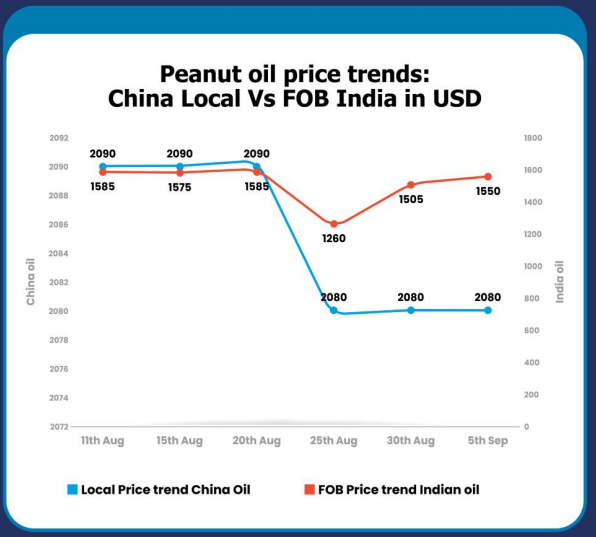
CHINA

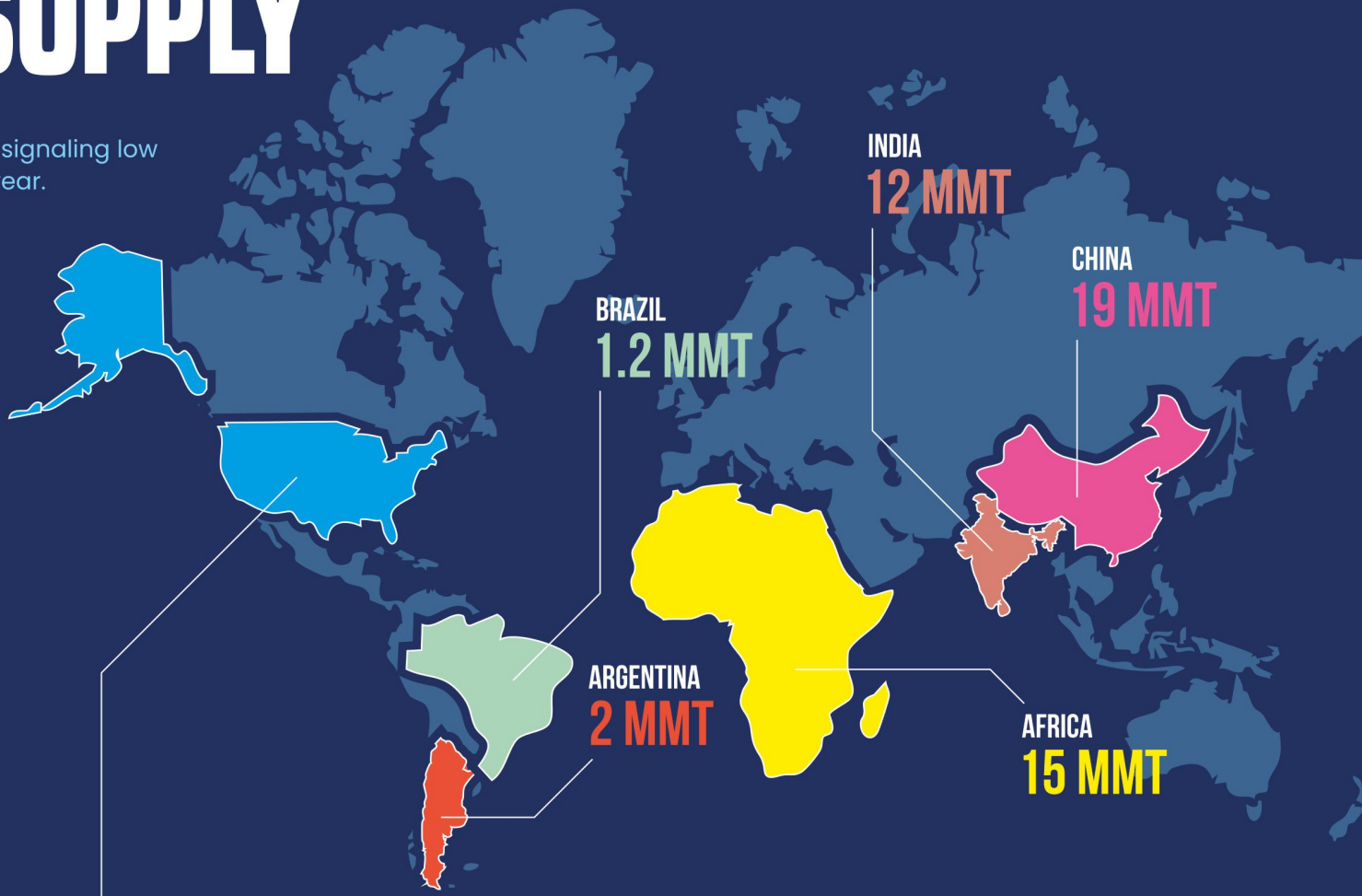
The new peanut market remains sluggish, with high-quality supplies tight due to prolonged rainy weather. In Henan, prime-grade peanuts are scarce, prompting procurement to shift toward Hebei and Liaoning. However, dry goods remain limited, keeping prices firm. Old-season inventories are mostly depleted and exert little influence. Quality differences are pronounced: premium dried goods hold steady, while lower grades face sales pressure. On the demand side, terminal consumption is weak, with limited tolerance for high prices and activity driven mainly by essential buying. Festive demand has offered little support, and domestic trading volumes remain subdued. Traders pursue quick turnover while maintaining strict quality control. Inquiries have risen in some regions but have not translated into broader price momentum. Circulation is uneven—high-quality lots move steadily, while lower grades struggle. Key drivers ahead include weather improvements in Henan, post-festival demand recovery, and harvest quality in Liaoning.

DEMAND & SUPPLY

There is a plentiful supply of peanuts worldwide, signaling low price trends throughout the 2026/27 marketing year.







Estimated Production	Estimated Consumption	Total Population
56 MMT	54 MMT	8.2 BILLION

Current Crops

ARG — Argentina — ARG 4050 - $1150

BRA — Brazil — BRA BL 3842 - $1300

CHI — China — CHI 41/51 - $1380

Henan crops face quality issues from rain, leading to elevated aflatoxin levels. Dongbei begins a good harvest.

IND — India — IND 4050 - $1200

The crop is in good condition, with no reports of damage. Harvesting is ON every where in Gujarat.

RSA — South Africa — RSA - $NA

USA — USA — USA 4050 - $1225

Dryland crops began strong after years, but now lack crucial rains for pegging and pod formation.

TNZ — Tanzania — TNZ - $NA

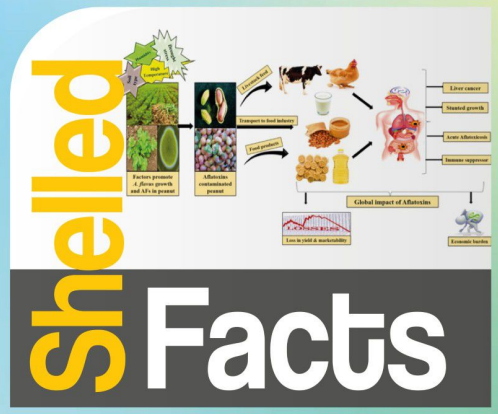
PEANUT VOICE

"I lead Gastaldi in Argentina's peanut sector. Former president at Argentine Peanut Chamber and Córdoba Grain Exchange, now President of Córdoba's Industrial Union, focused on building bridges, competitiveness, and sustainable industrial growth."

Luis Macario
President
Gastaldi Hnos. S.A.

What are the biggest risks facing peanut exporters right now, and how are you mitigating them?

Today exporters struggle with low prices, high costs, and uncertain demand. We try to adapt with efficiency and teamwork, trusting that long-term relationships and resilience will keep Argentina's peanut industry moving forward.



A glimpse of economic loss due to Aflatoxin:

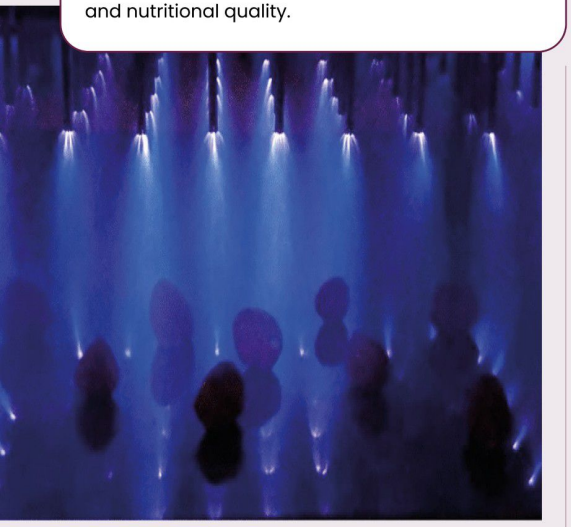
Aflatoxin contamination costs the U.S. peanut industry an average of USD 84 million every year. In 2019 alone, losses soared to more than USD 126 million due to rejected lots, remediation, and reduced crop value.

QUALITY SCIENCE

COLD PLASMA TECHNOLOGY

A NEW WEAPON AGAINST AFLATOXIN

Aflatoxin contamination is a persistent threat to peanut safety and quality, especially in warm, humid climates. Fortunately, new technology is offering promising solutions. One recent study by ICRISAT and collaborators shows that cold plasma (CP) treatment can significantly improve peanut safety and nutritional quality.



What is Cold Plasma?

Cold plasma is a non-thermal, chemical-free processing tool. It generates reactive oxygen and nitrogen species that attack fungal DNA, inactivate toxins, and do so without cooking or heavily altering the food.

Key Findings

- **Aflatoxin Reduction:** When peanuts (groundnuts) were treated with CP at 30 kV for 15 minutes, aflatoxin B1 levels dropped by over 80% compared to untreated, infected samples.
- **Nutritional Improvements:** Protein, fat, and crude fibre all increased under CP treatment. Also, phenolic and flavonoid compounds (which help with antioxidant power) were higher.
- **Minerals & Anti-nutrients:** Content of important minerals like iron and zinc improved under certain CP conditions. Meanwhile, anti-nutritional compounds such as phytates, oxalates, and tannins, which can reduce nutrient absorption, were lowered.

Why This Matters

This study suggests CP treatment can help achieve safer peanut products, reduce post-harvest losses, and improve export competitiveness for producers. For consumers, it means better nutrition and lower risk from toxins.

What to Watch Next

Before CP becomes widely used, researchers need to fine-tune the treatment settings (voltage, exposure time) to maximise benefits without harming peanut taste, texture, or nutrient balance. Scaling up to industrial levels and ensuring cost-effectiveness is also key.

Reference: *Das, D. et al. (2025) 'Impact of cold plasma treatment on aflatoxin decontamination, nutritional composition, bioactive compounds, mineral content and anti-nutritional factors of groundnuts', Current Science, 128(8), pp. 818–826. Available at:* https://doi.org/10.18520/cs/v128/i8/818-826

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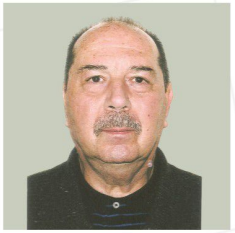

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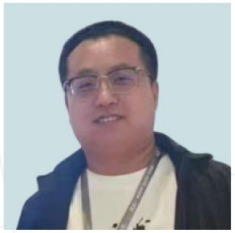
DIRECTOR Georgalos Peanut World



Du Xin Cheng
Manager of TianJin HanZhong Trading

Upcoming Events

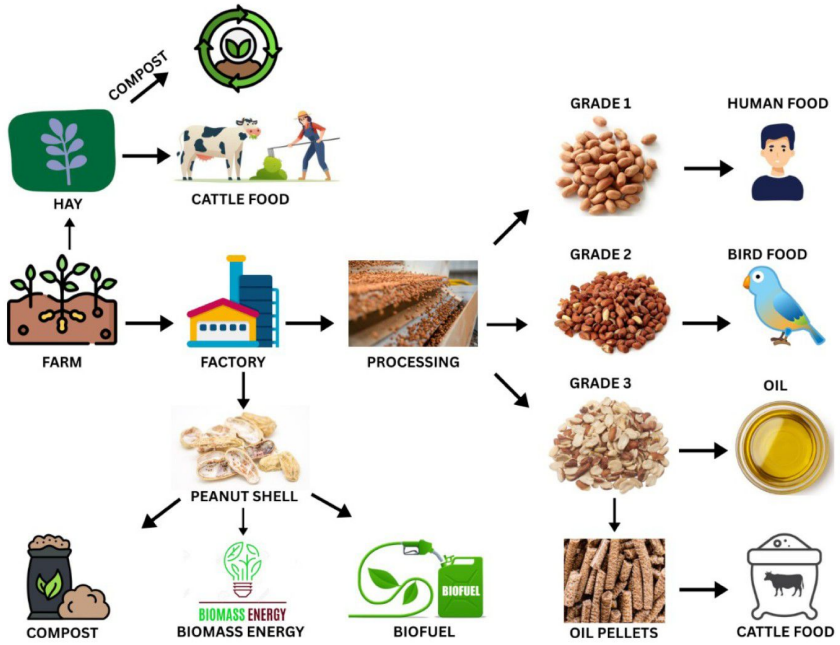
anuga

04-08 October
Cologne, Germany

Circular Economy & Resource Efficiency in Peanuts

SUSTAINABILITY

The peanut industry offers a strong example of how agriculture can embrace the principles of circular economy, where every byproduct finds value and waste is minimized. Unlike linear systems that emphasize "produce–use–discard," peanut farming and processing can be designed to close the loop — generating food, feed, energy, and soil nutrition in one cycle.



Zero-Waste Peanut Processing Peanut shells, skins, and other processing residues no longer need to be discarded as waste. Peanut hulls, for instance, are increasingly used in biomass energy and biofuel production, providing renewable energy sources. They can also be converted into compost or organic soil enhancers, helping farmers reduce reliance on chemical fertilizers. This not only cuts waste but also improves sustainability at the farm level.

Utilization of Peanut Rejections

In large-scale peanut processing and grading facilities, not every batch of peanuts makes it to the premium edible market. Rejections occur during sorting for size, color, breakage, or food safety standards such as aflatoxin testing. While unsuitable for direct human consumption, these rejected peanuts are not wasted.

They are diverted into alternative value streams:

- **Animal & Bird Feed** – providing a nutritious protein and fat source.
- **Oil Crushing** – rejections can be pressed for oil, which is then refined for edible or industrial purposes, including biodiesel.
- **Secondary Products** – lower-grade material can be used in feed formulations, feed cakes, or compost, closing the loop in the value chain.

By channeling factory-level rejections into these uses, the industry ensures that resources are not lost, aligning peanut production with circular economy principles.

Peanut Whey in Feed & Composting

During oil extraction, peanut whey (a protein-rich byproduct) emerges as an important resource. Instead of being discarded, it can be directed into cattle feed, supplying a sustainable protein source for livestock. It can also be composted, contributing organic matter to soil health and creating a regenerative cycle where farming byproducts feed back into the land.

Towards a Sustainable Peanut Value Chain

By embracing resource efficiency and circular economy principles, the peanut sector reduces its environmental footprint while creating new economic opportunities. From powering homes with peanut hull biomass to nourishing livestock with byproducts, peanuts exemplify how a crop can generate multiple streams of value beyond its primary use. For consumers and stakeholders, this model demonstrates that peanuts are not only a nutritious food but also a sustainable solution for the future of agriculture.

BIRD FEED

PREPARING FOR WINTER:
WHY AUTUMN PEANUT FEEDING MATTERS

Autumn – A Season of Preparation

As autumn sets in across Europe, wild birds face one of the most critical times of the year. Migratory species are gathering strength for long flights south, while resident birds must prepare for the challenges of cold winter nights. Both groups require high-energy foods to survive, and this is where peanuts play an essential role.

Peanuts: A Natural Energy Booster for Birds

Peanuts are packed with protein (25%) and healthy fats (50%), giving birds the energy and stamina they need, especially in autumn. Along with essential vitamins and minerals, their dense nutrition makes peanuts one of the best seasonal foods.

Across Europe, many species benefit from peanuts. Blue Tits, Great Tits, and Coal Tits flock to feeders, while Nuthatches and Woodpeckers thrive on the high-fat content. Larger birds like Jays and Crows often store peanuts for winter, and migratory birds rely on the energy boost before long journeys. By offering peanuts, gardens become lively feeding spots and vital support systems for bird populations.

The Business Case – Why It Matters

The European bird feeding industry is valued at over USD 700 million and is growing at an annual rate of 2.5%, with the strongest expansion in northern and western regions. Demand peaks during the colder months, particularly in autumn and winter. Within this market, peanuts consistently rank among the top three feeds, alongside sunflower seeds and suet. For distributors and retailers, peanuts are more than just a seasonal product—they are a core driver of autumn–winter revenue and a dependable category for long-term growth in the wildlife feed sector.

Best Practices for Autumn Feeding

To maximize benefits, peanuts should be offered responsibly. Mesh feeders are recommended to prevent birds from choking on whole peanuts. Only unsalted, safe-quality peanuts should be used, with regular cleaning of feeders to avoid mold. Many retailers also find success in combining peanuts with other seeds to create premium seasonal mixes.

Conclusion

For birds, peanuts are more than a treat—they are a survival tool during autumn and winter. For EU market, they represent a product with both ecological value and strong consumer demand. Promoting peanuts as the must-have seasonal bird feed creates a win-win: healthier bird populations and a thriving wildlife feed market.

J11 – The World's Most Researched Peanut Variety for Aflatoxin Resistance

Aflatoxin is one of the biggest challenges in the peanut industry. This invisible toxin, produced by certain fungi, not only affects food safety but also causes millions of dollars in losses every year. Scientists across the globe have been searching for natural solutions, and one peanut variety has become the shining star in this fight – J11.

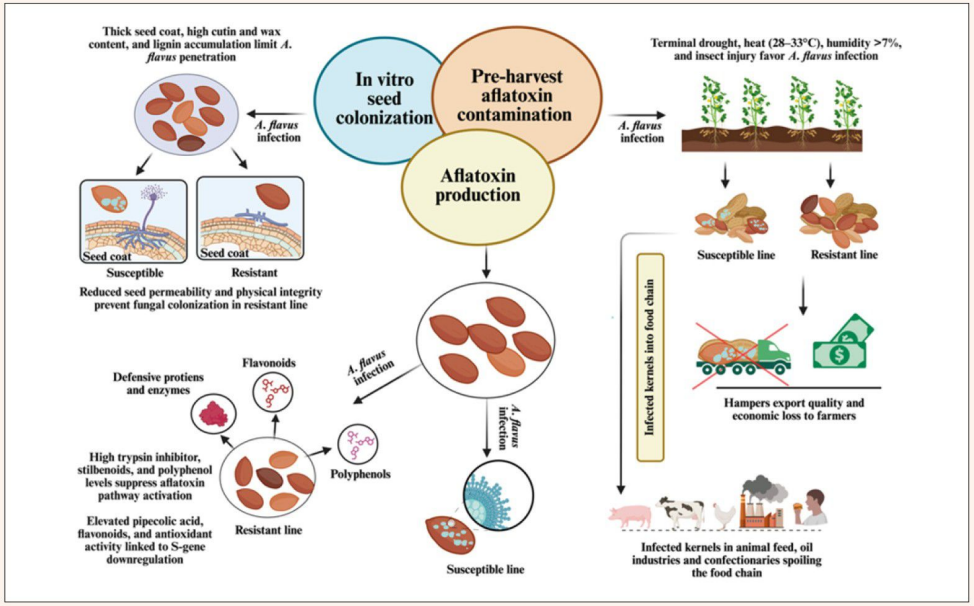


Fig: Multifaceted resistance mechanism in peanut against A. flavus, typically classified into three main categories: resistance to seed colonization (IVSC), resistance to pre-harvest aflatoxin contamination (PAC), and resistance to aflatoxin production (AP).

* Image shown is for illustrative purposes only and may not represent the actual product

Why J11 Stands Out

J11 is a peanut line originally developed in India that has shown a remarkable natural resistance to aflatoxin contamination. While no peanut is completely immune, J11 consistently performs better than most other varieties when exposed to aflatoxin-producing fungi. This makes it a benchmark variety; a starting point for scientists working on aflatoxin solutions.

A Global Research Hero

J11 has been used in hundreds of studies worldwide. Breeding programs often use J11 as a donor parent to pass on its resistant traits to new peanut varieties. It is at the centre of advanced research, including genetics, genomics, and field trials, all aiming to reduce aflatoxin naturally.

What It Means for Farmers and Consumers

If more peanut varieties with J11's resistance are developed and adopted, it could:

- Cut down aflatoxin contamination dramatically.
- Save millions of dollars in rejected exports and wasted crops.
- Boost consumer trust by ensuring safer peanuts in global markets.

The Road Ahead

J11 is not just a peanut; it is a symbol of hope. As researchers continue to unlock its secrets, the dream of an aflatoxin-free peanut industry comes closer to reality.

Reference: *Khadgi, A., Lekkala, S., Verma, P. K., Puppala, N., & Janga, M. R. (2025). Emerging Strategies for Aflatoxin Resistance in Peanuts via Precision Breeding. Toxins, 17(8), 394.*

https://doi.org/10.3390/toxins17080394

Peanut *Science*

Pnutking