PEANUT POST





MARKET HIGHLIGHTS

China

At lower price levels, the supply of old-crop and blanched peanuts remained stagnant, as most of the old stocks were held in cold storage with no urgency to liquidate, particularly given the unfavourable early performance of the new harvest. Prices for small kernels (Baisha) increased from US\$1,200 to US\$1,300/ton, while blanched large kernels (4151) rose from US\$1,190 to US\$1,300/ton, all on an FOB basis.

With improved weather conditions supporting a better harvest in the last week of October, prices have started to ease back toward previous downcycle levels. By mid-November, both new and old crop prices are expected to reach significantly lower levels.



With ample stocks of 2024-crop TJ and Bold varieties, the new harvest commenced, leading to a price correction of nearly 5%. The Indonesian import ban had minimal impact on domestic prices, as local festive demand and holiday-related buying helped sustain market activity.

New crop Bold 40/50 FAQ traded between US\$900–975/ton FOB, while TJ 80/90 FAQ ranged from US\$900–925/ton FOB. Peanut oil prices hovered between US\$1,400–1,490/ton.

With an estimated 11 million tons of new-crop supply and an additional 2 million tons of carryover stock, India remains well supplied, setting the stage for a competitive tug-of-war between bearish and bullish market forces.

Argentina

Offers from the Latin American region, particularly Argentina, remained quiet at lower price levels, supported by steady order books and strong Anuga fair sales. However, with ample market supply, pressure is building for sellers to release stocks.

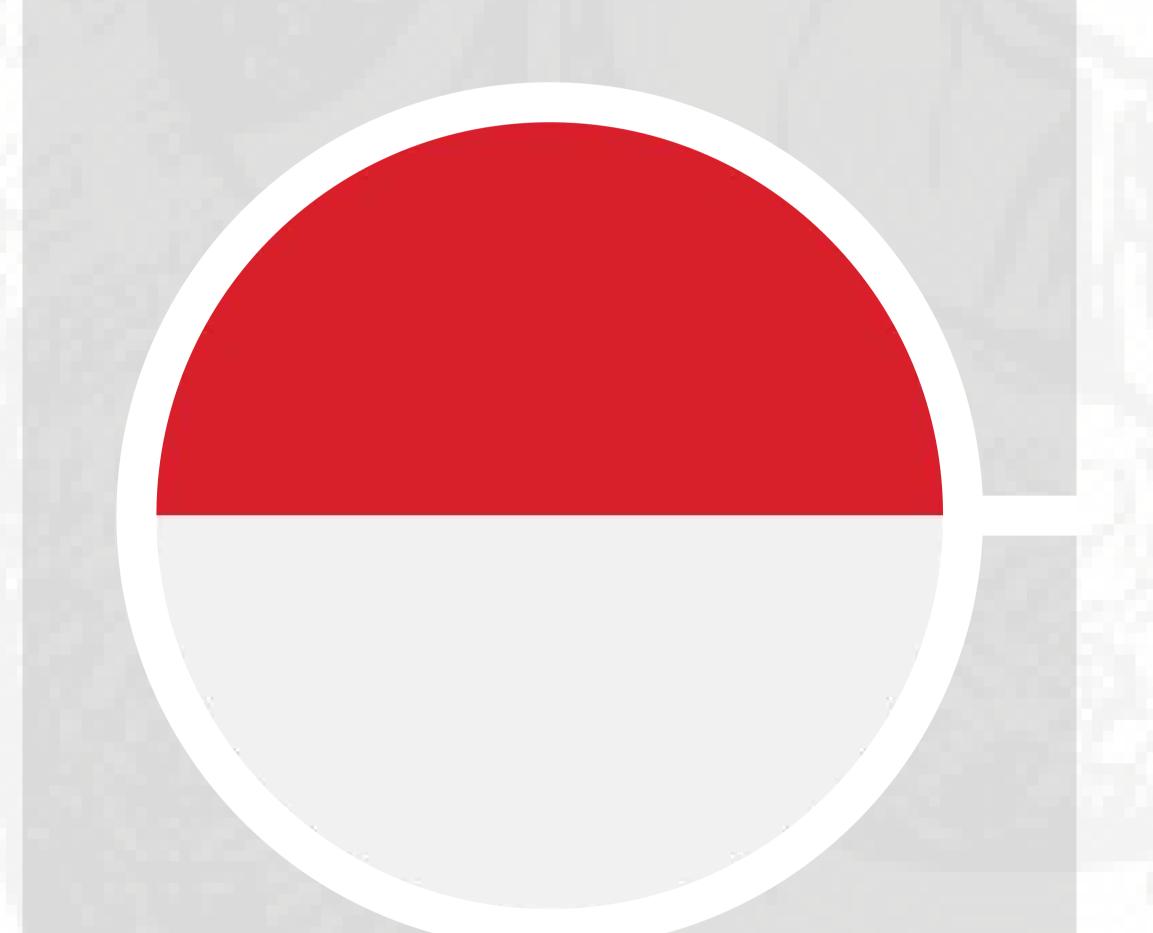
Bird feed grades were quoted between US\$750–850/ton FOB, while crushing grades ranged from US\$600–750/ton FOB. Prices for large kernel sizes (30/35 and 38/42) continue to hold firm and may remain stable, though smaller grades appear vulnerable to a bearish trend. A sharp reduction in new planting intentions is unlikely to trigger any sustained bullish movement in the near term.

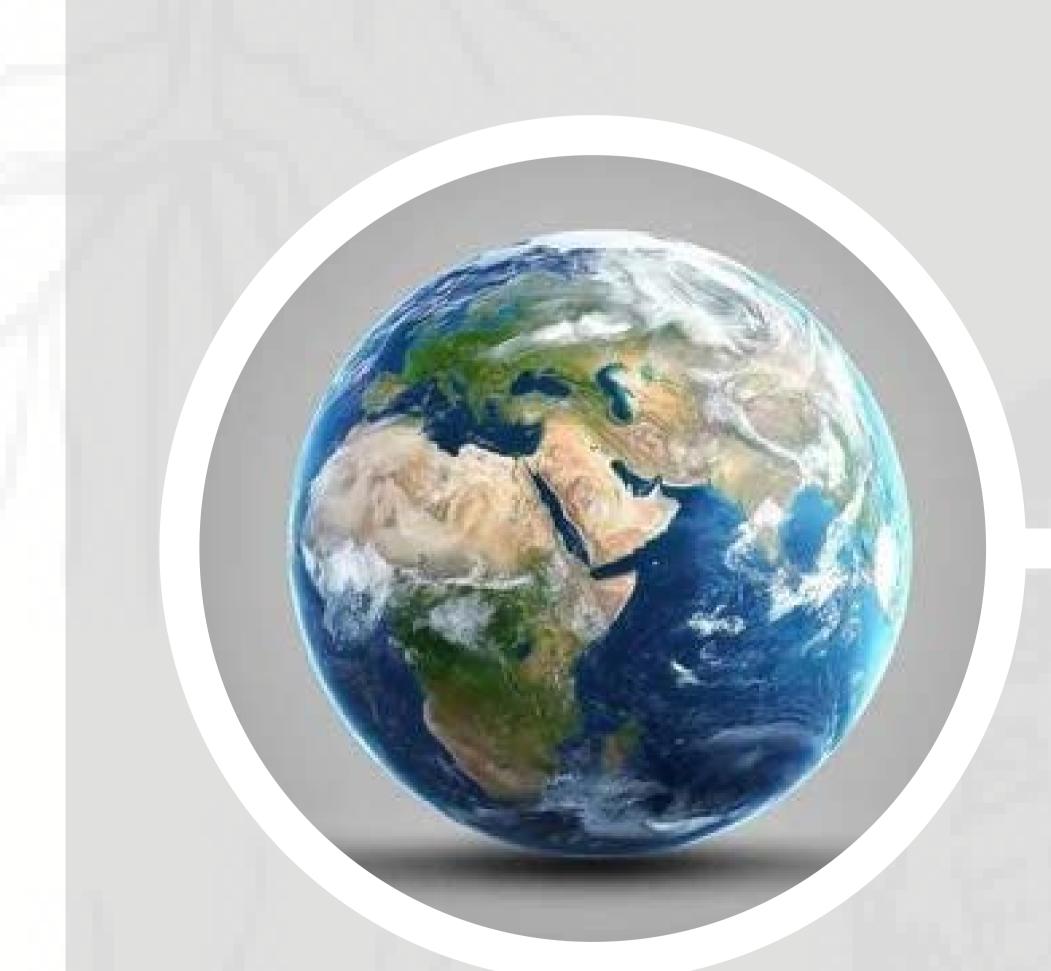












China

Nearly one-third of the month was lost to autumn holidays, while the remaining period was marked by a significant market lull and persistent quality issues such as elevated FFA and aflatoxin levels. Futures continued to decline, and extended rainfall disrupted the new harvest, lowering the procurement prices for oil crushers. Oil futures traded at 7788 rmb/mt, down by 0.51%.

Despite weak sentiment, food-grade peanut demand showed some activity, though at reduced intensity, pushing prices upward due to poor-quality arrivals early in the season. Import demand remained negligible, or limited to price levels that were commercially unviable.

Indonesia

In October, peanut prices in Indonesia surged by nearly 40%, following the import ban on Indian peanuts due to recurring shipments with high aflatoxin and mould contamination. Local crop prices ranged between IDR 25,000–30,000/kg, while even the lowest-grade imported peanuts traded around IDR 23,000/kg. A few importers turned to Chinese origins to partially meet domestic demand. Despite elevated prices, consumption remained subdued owing to affordability constraints.

Other Regions

Demand from Russia and CIS countries remained sporadic and opportunistic, with buyers engaging in bottom-fishing and gradually shifting from Brazilian to new-crop Indian origins. Prices ranging between \$1000-1100 for large size bold peanuts. India currently holds a competitive edge in both quality and pricing, further supported by the possibility of INR-based settlements with Russian importers instead of USD.

In contrast, demand from Vietnam, Thailand and the Philippines was muted and highly selective. The market also witnessed instances of bad debts in Thailand and Vietnam, estimated at around US\$2–6 million, likely stemming from local tax complications and financial distress among importers.

P-2

PEANUT WIZARD

Aflatoxin has been a major issue in the nut industry—particularly in peanuts—since 1960s, causing estimated financial losses of around US \$0.5 billion annually.

HOW TO MITIGATE IT?

Mitigation is an ongoing, multi-stage process throughout the peanut value chain. Here, we provide detailed information for each stage. For any assistance with aflatoxin mitigation, feel free to reach out to us via our website.



Cropping: Choose aflatoxin-tolerant peanut varieties and follow crop rotation to reduce fungal load. Manage irrigation and pest control to minimise drought stress and pod damage.



Production: Test incoming batches and segregate those above safety limits before processing. Use mechanical and optical sorting to remove high-risk kernels and reduce aflatoxin load.

Pre-Harvest: Apply region-specific biocontrol to suppress aflatoxin-producing fungi. Harvest at optimum maturity and avoid delays to reduce fungal colonisation.



days.

Post-Harvest: Remove damaged

pods and debris immediately after

harvest to reduce contamination.

Dry peanuts rapidly to safe

moisture levels within 7 to 10

Logistics: Use barrier packaging and container liners with desiccants to prevent moisture ingress. Stack pallets to allow airflow and prevent ed vents, ensuring even temperature and humidity distribution.

Storage: Store peanuts at safe moisture (<8%) and low relative humidity (<70%). Maintain a clean, pest-free warehouse and rotate stock frequently using FIFO.

Aflatoxin: Origination Risk



Our expertise?

Since 2008, we have been proactively combating aflatoxin risks. Our expertise and inhouse solutions deliver tangible results—though we continue to strive for perfection.

Our aflatoxin capabilities include:

A comprehensive traceability database covering aflatoxin-prone regions

02

Strictly adhere to regulatory standards such as Codex Alimentarius, ISO 22000, GAP and leading MNC standards.

03

Deployment of precise grading and sorting technologies to detect and remove susceptible and high-risk kernels, reducing aflatoxin at the processing stage.

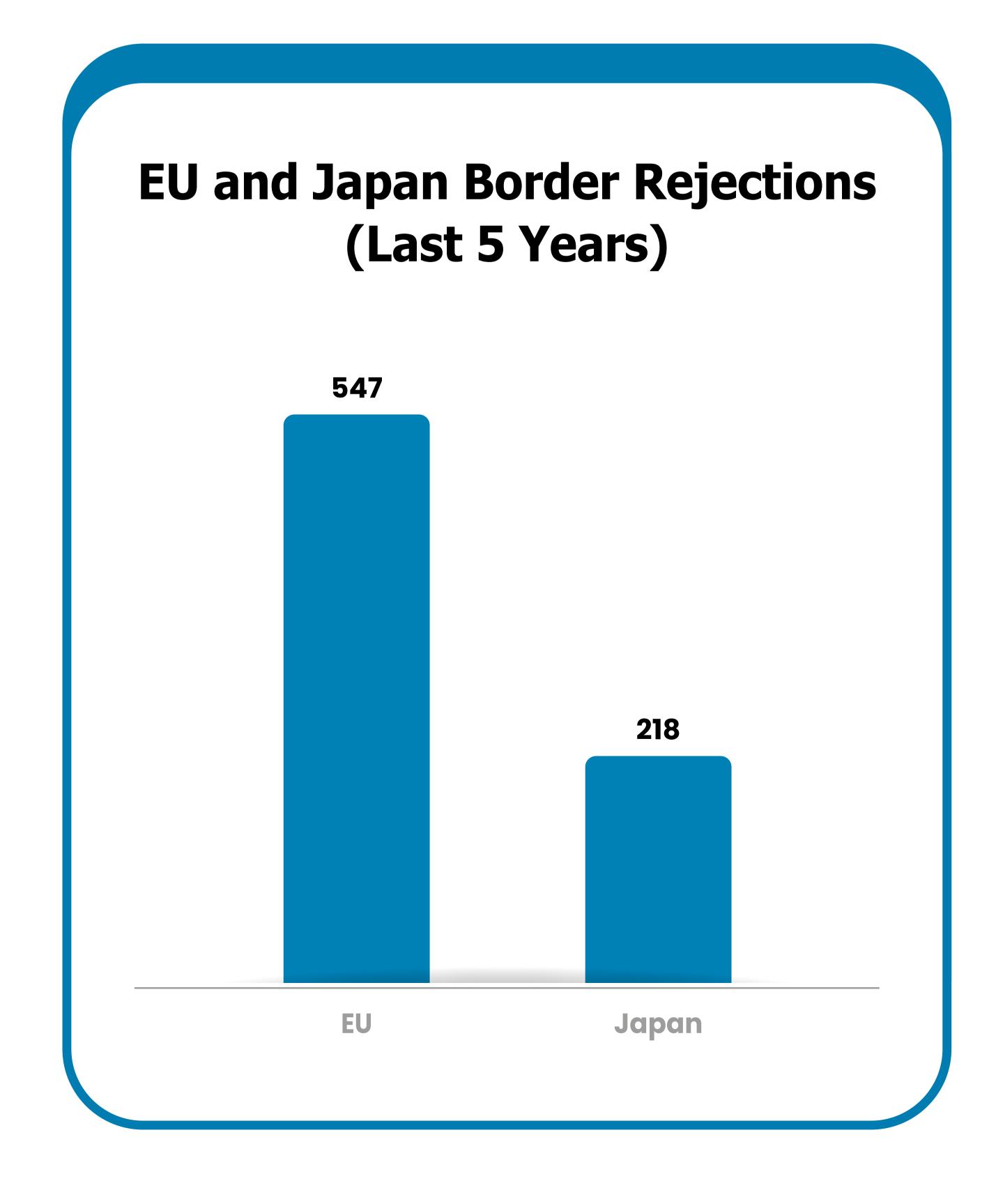
A highly trained, specialist team with deep aflatoxin expertise

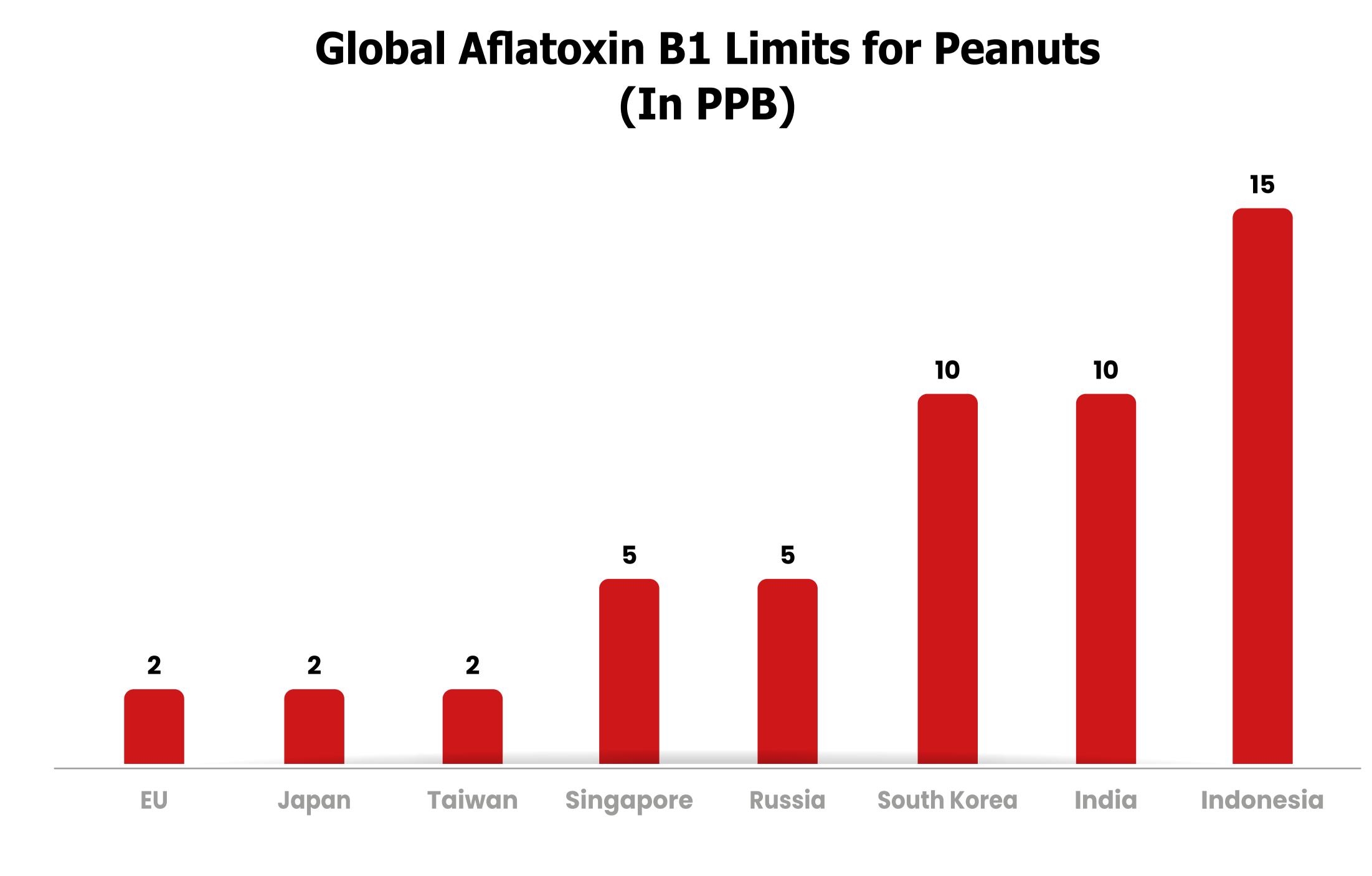
05

Ongoing innovation and R&D focused on aflatoxin mitigation

Our approach to aflatoxin adds a third dimension—linking traceability data with seasonal aflatoxin mapping and correlating it to weather conditions in growing regions.

This integrated view forms the bedrock of our decision-making process.





Peanut Wizard P – 5

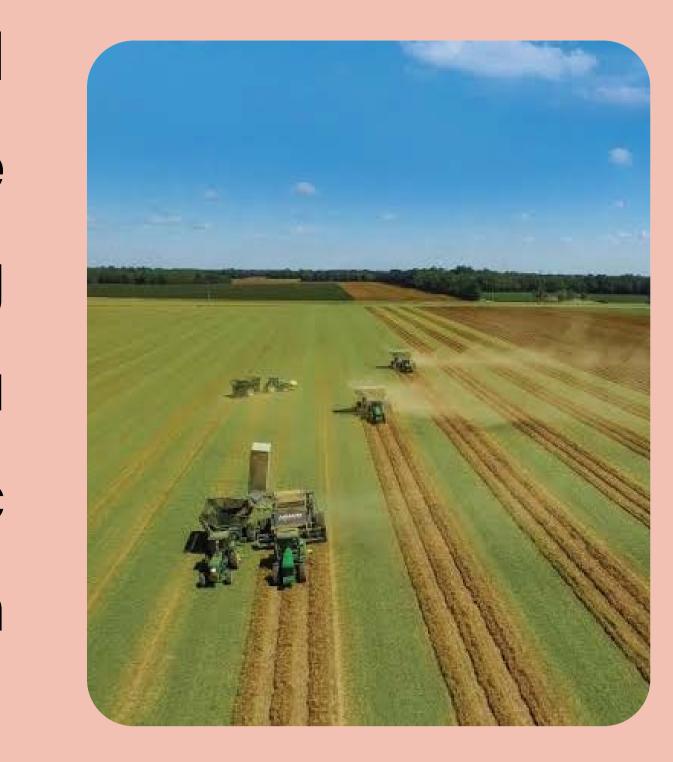
Argentina's 2025/26 peanut planting season has begun with a notably lower area compared to last year. Estimates vary: SAGyP projects a modest 11.3% drop to 470,000 hectares, while CAM foresees a sharper 27% decline to 389,560 hectares. Industry sources suggest reductions ranging between 22% and 30%, placing the planted area around 420,000–440,000 hectares. According to Georgalos Peanut World (GPW), the 2024/25 crop covered 535,000-540,000 hectares with yields near 3.7 MT/Ha, totaling about 2 million tons of inshell peanuts. For 2025/26, GPW expects 430,000-440,000 hectares. The sector expresses growing concern over persistently low peanut prices, as production costs remain high and profit margins stay negative despite slightly lower land rents. (Reported by Georgalos Peanut World)



Brazil's new peanut season is just getting underway, with planting beginning in a few regions—though volumes remain limited for now. As the season progresses, expectations of a 30-35% drop in planted area are becoming increasingly realistic. Export activity has stayed relatively steady, but shipments to China have fallen amid stronger domestic production there, softening both kernel and peanut oil demand. In September, Brazil exported 30,000 tons of peanuts—up 19% from a year earlier and roughly on par with August. Reduced Chinese buying was balanced by higher demand from the EU, Russia, and Algeria. China still represented about one-third of total exports, while EU demand remains slow and tied to existing contracts. Russia is in peak buying mode, and Algeria has returned to the market after earlier payment issues, though longterm stability is uncertain. Peanut oil exports reached 10,000 tons in September-31% lower month-on-month, but still 80% higher year-on-year. Cumulative oil exports now total 108,000 tons, up 162% from last year and edging close to the 2022 record, keeping hopes alive for a record-breaking year despite recent moderation. (Reported by Samtraco)

Global Markets

Peanut exports have slowed across major destinations amid tariff uncertainty and intensified price competition in non-EU markets. U.S. farmer stocks remain tight due to ongoing trade tariffs with China. Meanwhile, Brazil, Nicaragua, and Paraguay are redirecting volumes to Mexico, Canada, and China-traditional U.S. markets-to ease stock pressure. Argentina and Brazil are increasingly supplying China with raw peanuts for crushing and limited high-oleic edible peanuts, partially filling the gap left by reduced U.S. shipments. Global trade flows remain fluid as exporters adjust to shifting market dynamics. (Reported by Georgalos Peanut World)



Bhavnagar, Junagadh, Keshod, weather. Gondal, and Rajkot. Lighter rainfall remains largely pending. With G20 activity. acreage already lower than the 39

has touched Pathavada and In Rajasthan, rain alerts continue Halvad, while in Kutch's Abdasa though significant showers have region, harvesting continues under yet to hit. Harvesting of the Bold threat. Persistent rain poses a variety is ongoing, but further serious risk to the Bold crop, - Major rain could harm the crop. Trading producing area like Junagadh- remains focused on in-shell Porbandar belt, G20 harvesting material, with limited Java and TJ

variety, any further rainfall could Across the southern region, delay arrivals and reduce quality. arrivals in Karnataka remain low, Market activity has slowed sharply while sowing activity gains pace amid weak domestic demand in parts of Karnataka, Telangana,

Gujarat is currently and anticipation of government Andhra Pradesh, and Tamil Nadu, on rain alert, with heavy showers— procurement, while in-shell trading supported by the best rainfall in up to 11 inches—reported across remains muted due to unstable recent years—raising hopes for a healthy upcoming crop.



OTHERS

Indonesia The market remains firm with steady

demand—plenty of inquiries but limited deals as groundnut kernel availability stays tight. Many secondary buyers have shifted focus to blanched peanuts, with several importers already expecting new blanched arrivals. Some China-origin cargo is also due within 2–3 weeks, with a few shipments routed via Dumai. Meanwhile, local crops face high moisture levels from ongoing rains.

South Africa South Africa's 2025 peanut crop is finalized at 61,389 tons (kernel basis). The market remains stable with good aflatoxin quality. There's a potential oversupply of larger kernels (50/60, 60/70), while demand for smaller kernels, splits, and cross-border exports stays strong. Planting intentions for the 2025/26 season are positive, with sowing already underway. Corn and soy prices remain under pressure.

Senegal The upcoming peanut season is just around the corner, kicking off in November! This year's harvest is projected to reach 0.8 million metric tons (in-shell). Exporters are eager to begin trading, but all eyes are on the pending government export approval.

Sudan's new peanut season is just getting underway, but the outlook remains uncertain. With RSF now holding key areas of Darfur, logistics to Port Sudan are highly disrupted. As a result, much of the crop may flow west into Chad rather than reaching export channels through the Red Sea.



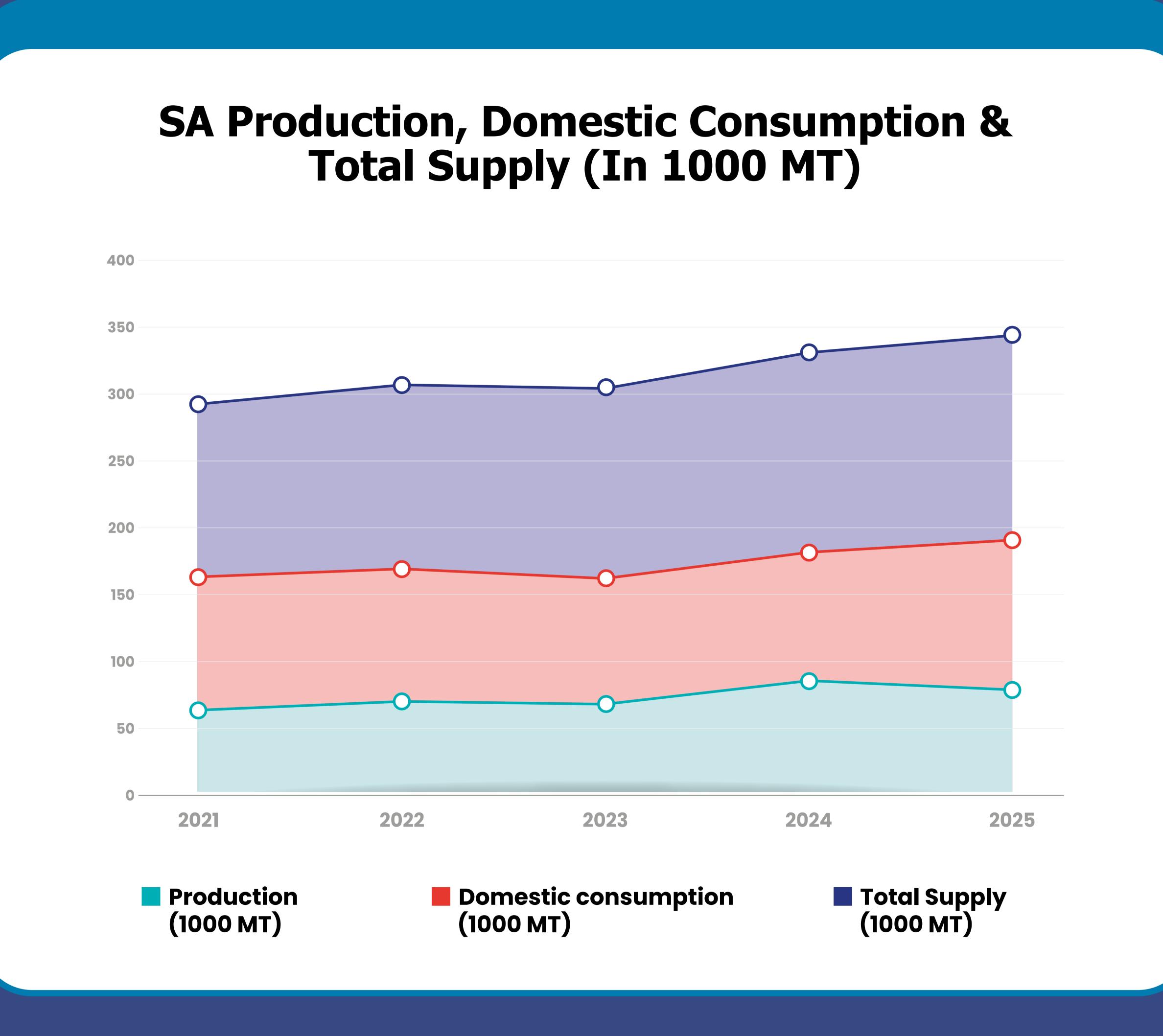
CHINA

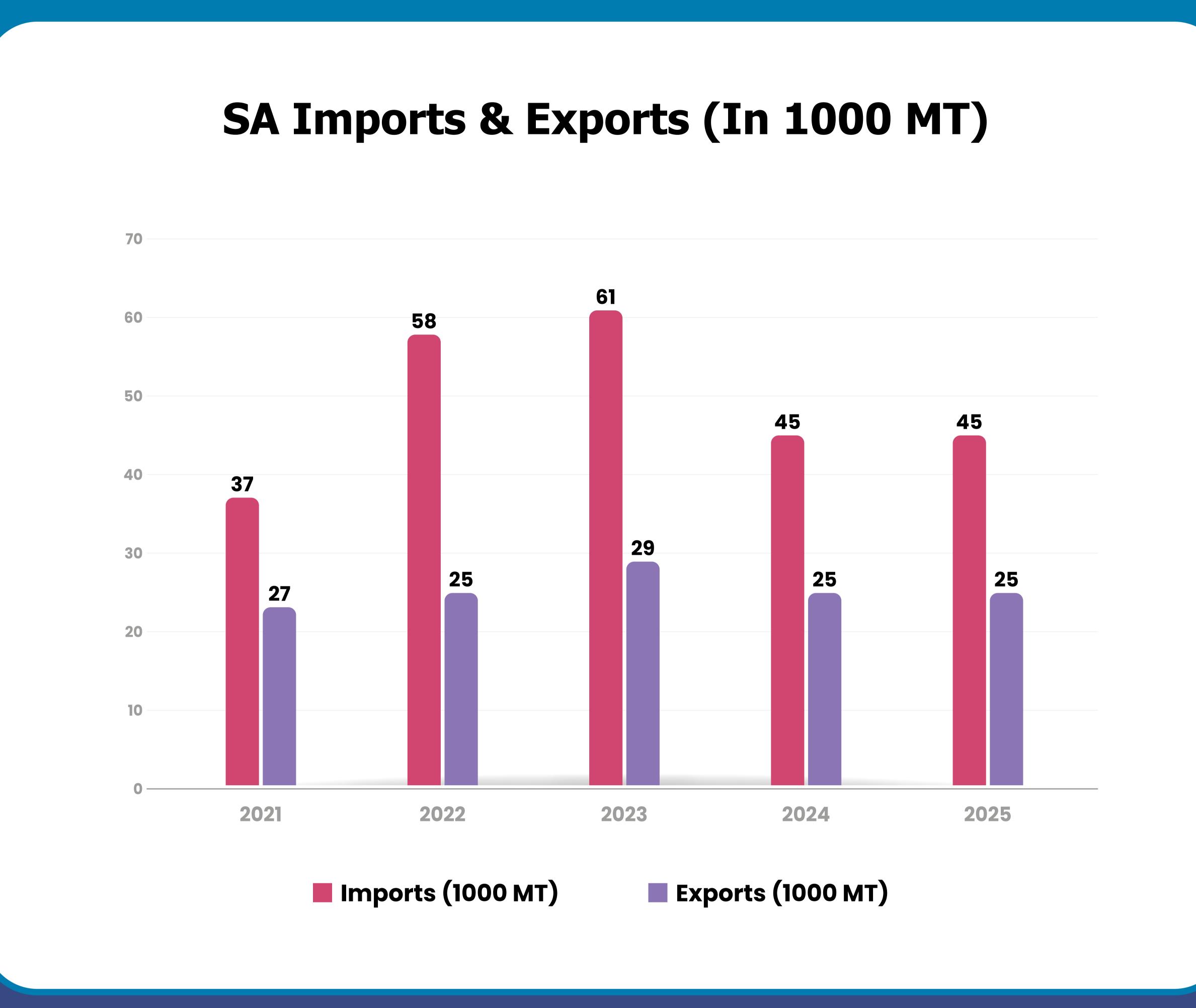
The domestic peanut market is slowing as trading activity weakens and prices continue to decline. In Henan Province, improved weather has sped up the drying and harvesting of new wheat-stubble peanuts, boosting supply and pressuring prices further. With expectations of a loose mid-term supply, many

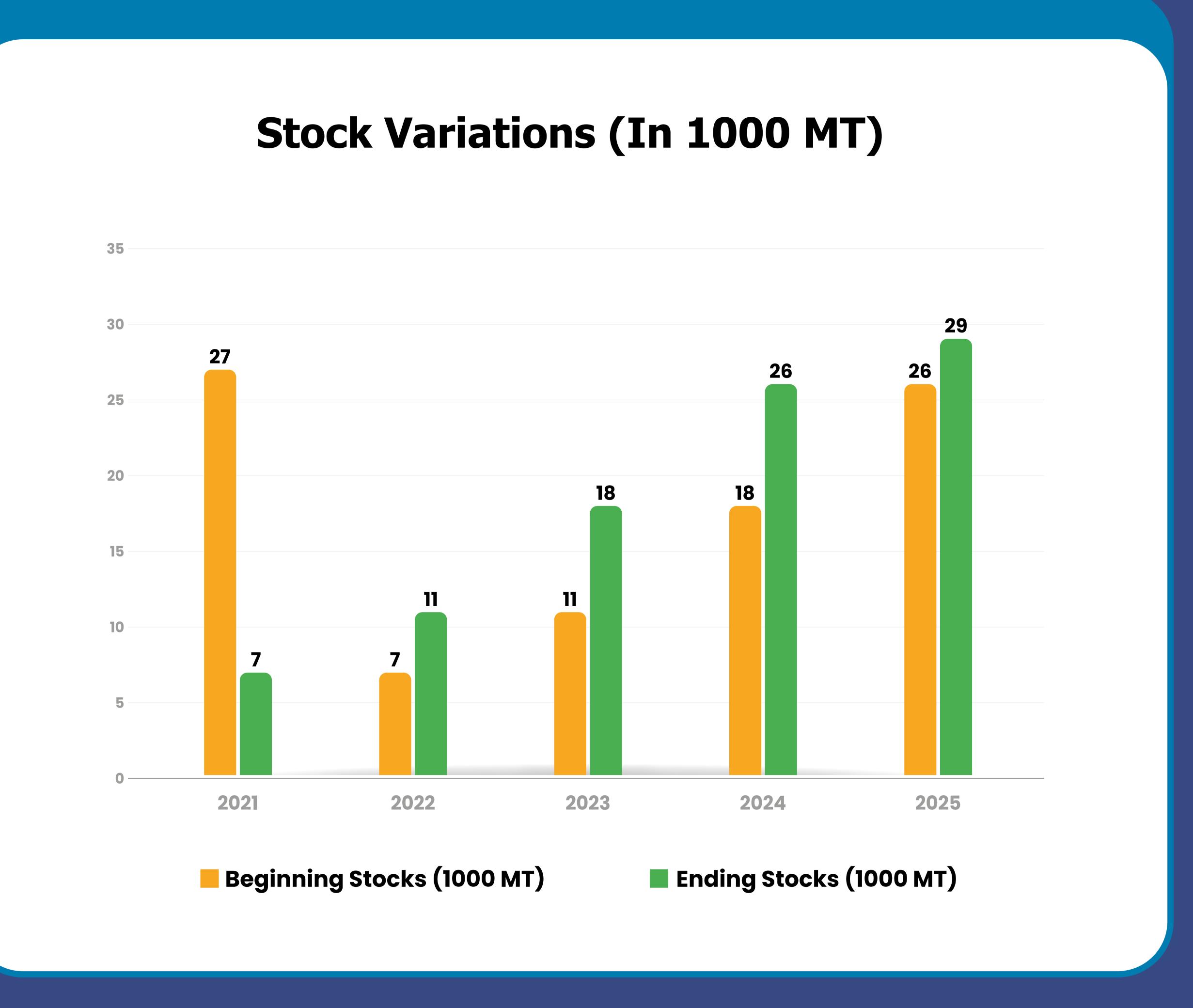
buyers are holding off on purchases to minimize risk. The widening price gap between Henan and Northeast regions has also dampened demand for the higher-quality Northeastern peanuts, reducing their competitiveness. On the demand side, sluggish sales in domestic trade and food processing, along with low oil mill operation rates, continue to weigh on the market. If more Henan peanuts are diverted to food processing, prices may face additional pressure. For now, favorable weather is aiding post-harvest drying, with larger volumes expected soon. At Huangdao Port, top-quality Sudanese peanuts are trading around USD 1210/MT, while first-grade peanut oil averages USD 2055/MT.

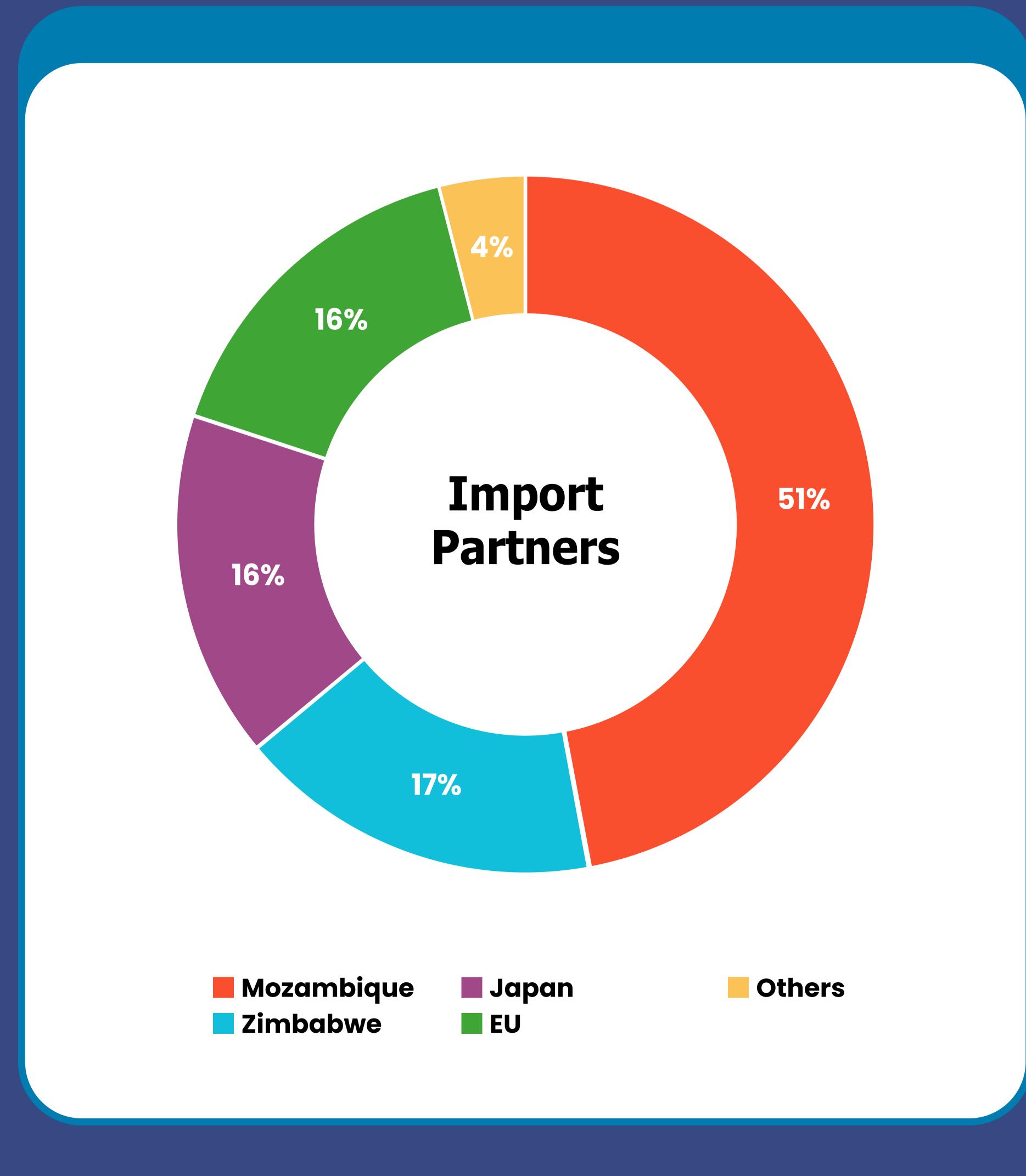
Global Markets P-7 P - 6

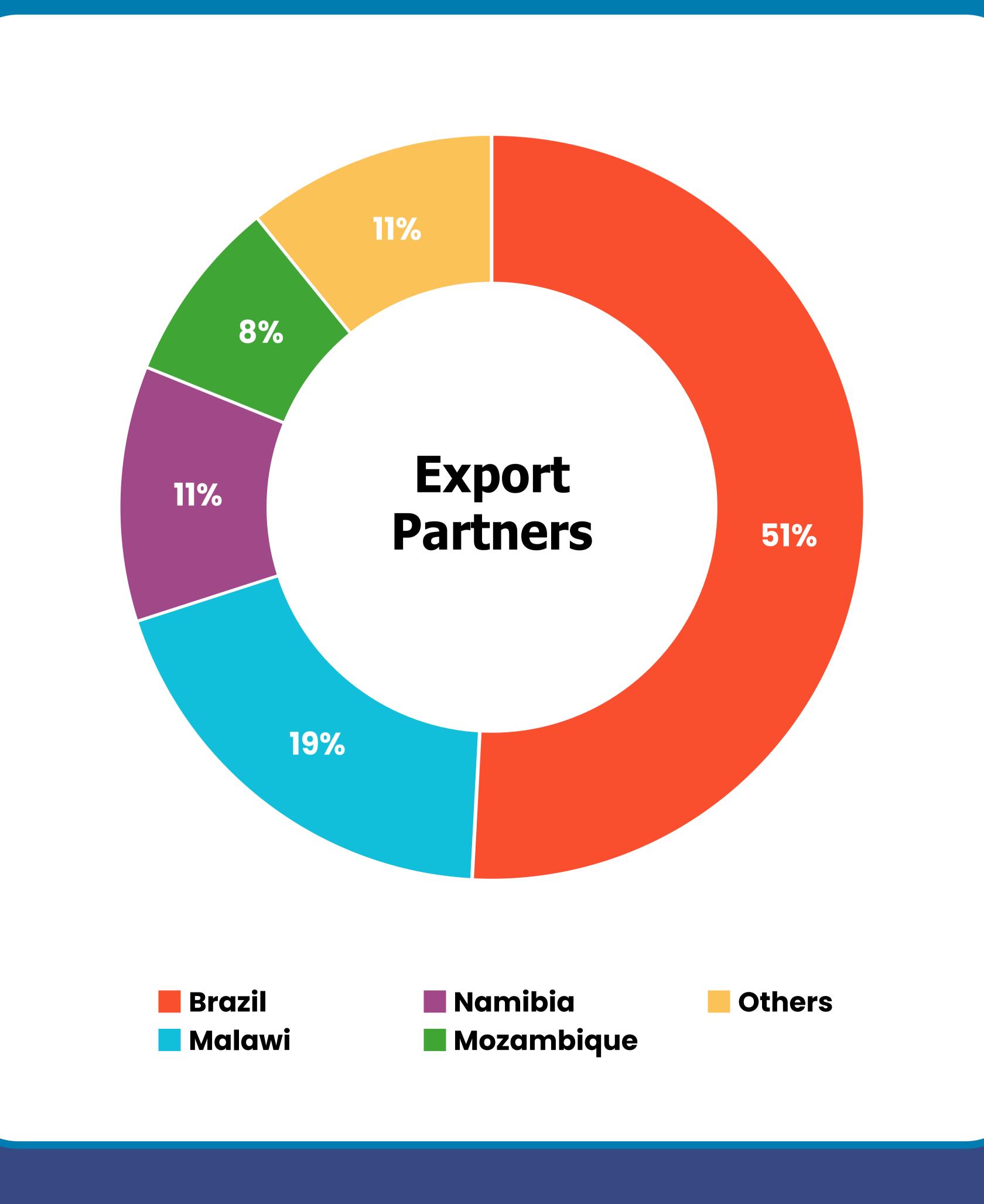
SOUTH AFRICA DEMAND & SUPPLY

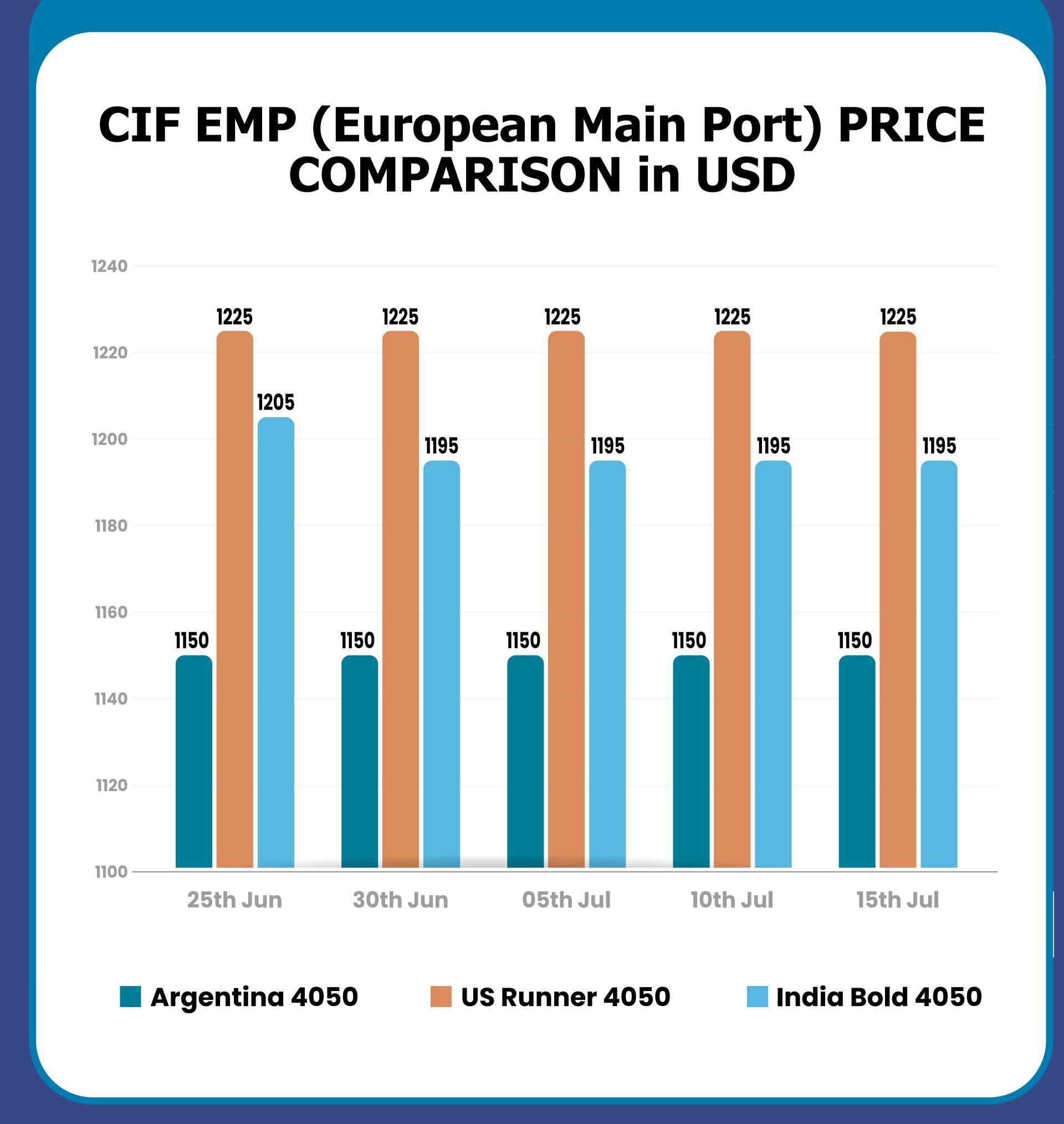


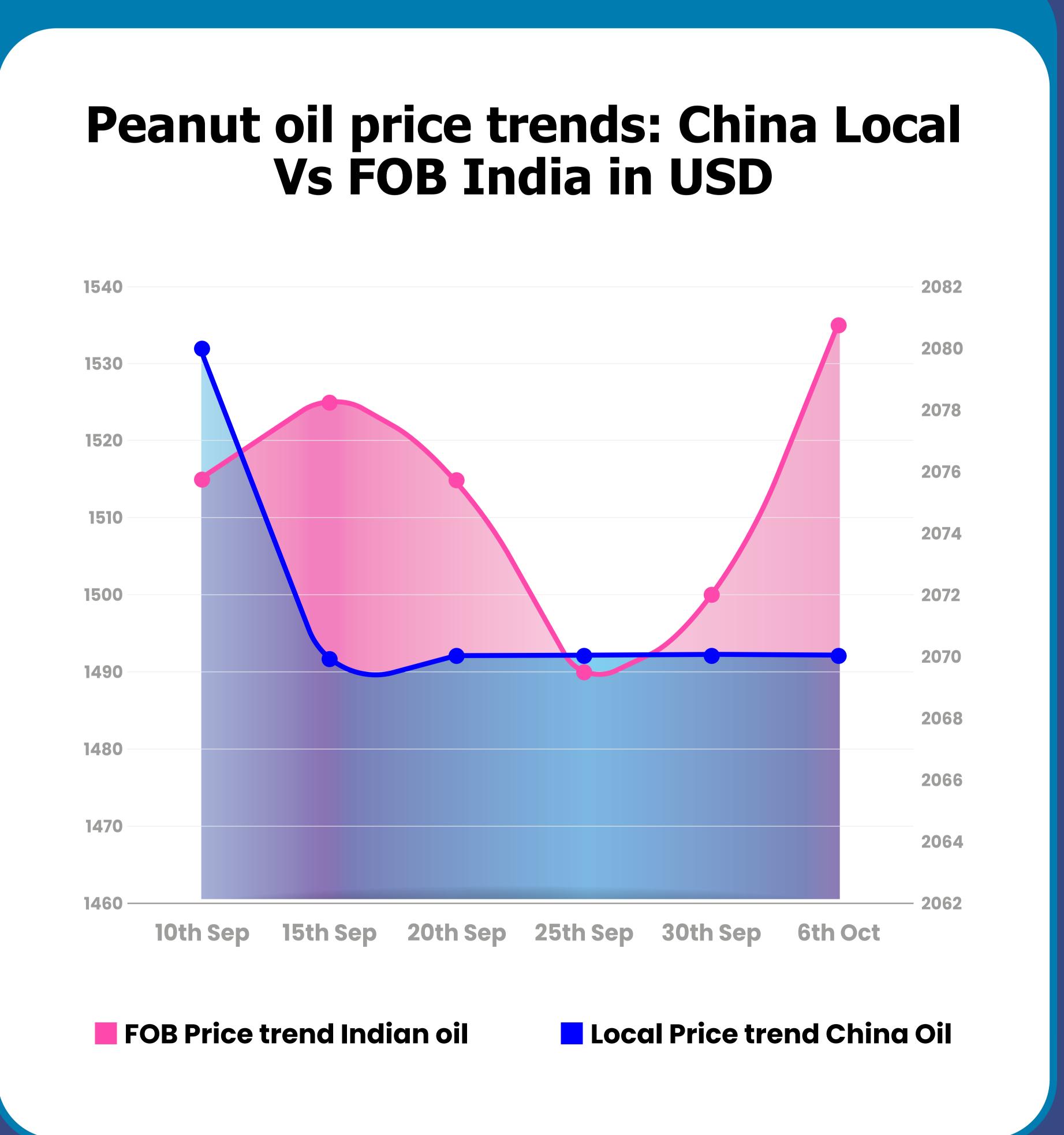












Gurrent - Argentina ARG ARG 4050 - \$1150 V Argentina begins 2025/26 planting with a projected 22-30% area reduction. Brazil 6 BRA BRA BL 3842 - \$1300 V Brazil begins new season with early planting and a likely 30-35% area reduction. CHI CHI 41/51 - \$1460 🛕 Weather has improved; drying is underway, and higher volumes are expected soon. Unstable weather is disrupting harvesting, putting G20 Bold and Pathawada TJ crops at risk of damage. RSA - \$NA New crop quality remains stable, with aflatoxin results showing no concerns. Local crops show high

moisture levels (9-10%)

due to recent rains.

(FAMI) VOICE

of the Texas Peanut Producers Board.
I've worked for the board for over 20 years, serving peanut farmers through the development of innovative domestic and international marketing, overseeing production research aimed at increasing grower profits and serving as the "face of Texas Peanuts. 99"

Shelly Nutt
Executive Director
Texas Peanut
Producers
Board



Texas peanut farmers battle triple threats: relentless drought and heat shrinking yields, low commodity prices, and stubborn pests and weeds cutting into any potential profits. Despite smart irrigation and better seed varieties, unpredictable weather and rising input costs keep profit margins tight, creating more and more stress on peanut farmers.

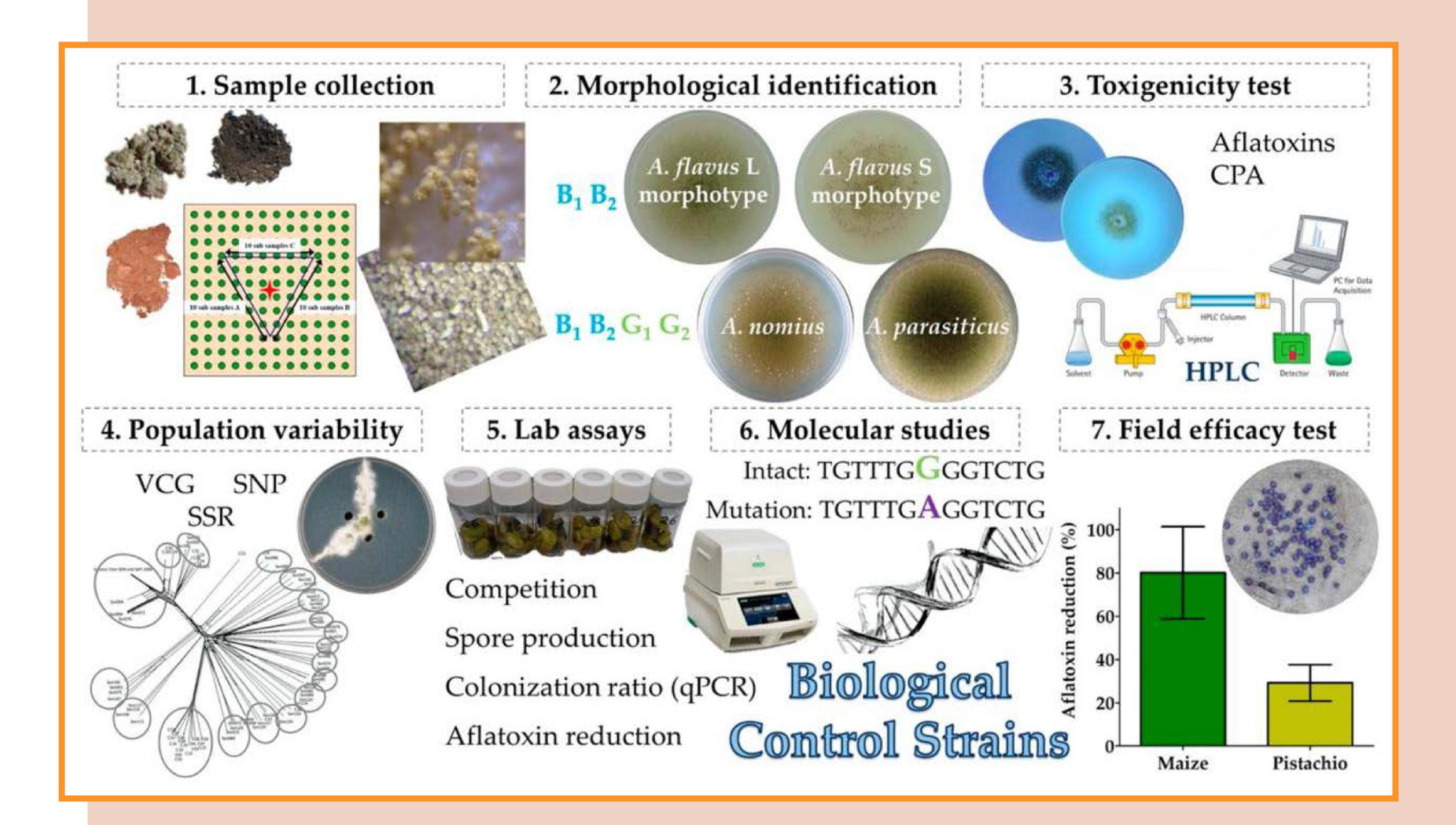


Aflatoxicosis:

The term "aflatoxicosis" originated in India after 2,219 chicks died in Mysore poultry farms during the 1960s due to contaminated peanut feed. Around the same time, "Turkey X disease" in the U.K. (1961) was linked to the deaths of over 100,000 turkey poults caused by aflatoxin-tainted peanut meal.

(Toxins (Basel). 2019 Jun 3;11(6):315. doi: 10.3390/toxins11060315)

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

Aflatoxin contamination remains a persistent threat to peanut quality and safety, especially under drought or heat stress, where Aspergillus flavus thrives. Traditional chemical fungicides or post-harvest detoxification methods have limitations in cost, safety, and scalability. In this light, the 2021 study by Yan et al. demonstrates a promising biocontrol approach — using non-aflatoxigenic strains (i.e., "safe" strains unable to produce toxins) of A. flavus to suppress aflatoxin formation in peanut kernels.

In their experiments, two non-aflatoxigenic strains were introduced into soil or pods under both normal and drought stress conditions. The results were significant: aflatoxin levels in peanut kernels dropped markedly (P < 0.05). The beneficial strains effectively competed with or displaced toxigenic strains, limiting their colonization and toxin production. This effect held even under drought stress, which normally exacerbates aflatoxin risk. Population analysis confirmed that higher dominance of the beneficial strain corresponded to reduced aflatoxin levels in harvested peanuts.

This strategy offers several benefits:

- Chemical-free and environmentally friendly, avoiding pesticide residues.
- Sustainable, as once established, the nontoxigenic strains can persist across seasons.
- Resilient under field stress, showing efficacy even during drought conditions.
- Scalable, easily adaptable into normal peanut agronomic practices such as seed coating or soil inoculation.

While the study demonstrates strong potential, it also opens the door for more advanced developments in the future. With progress in microbial genomics, soil microbiome engineering, and precision application technologies, the next generation of biocontrol systems could be designed with greater stability, climate adaptability, and region–specific customization. Integration of bio-control with digital soil mapping and predictive fungal modeling could further enhance field-level aflatoxin prevention.

Thus, this research not only highlights a promising sustainable alternative for aflatoxin control but also marks the beginning of a new era in biologically intelligent peanut farming, where nature's own microbes are harnessed as active protectors of quality and safety.

Reference:

- 1. Yan, L., Song, W., Chen, Y., Kang, Y., Lei, Y., Huai, D., Wang, Z., Wang, X., & Liao, B. (2021). Effect of non-aflatoxigenic strains of Aspergillus flavus on aflatoxin contamination of pre-harvest peanuts in fields in China. Oil Crop Science, 6(2), 81–86. https://doi.org/10.1016/j.ocsci.2021.04.004
- Moral, J., Garcia-Lopez, M. T., Camiletti, B. X., Jaime, R., Michailides, T. J., Bandyopadhyay, R., & Ortega-Beltran, A. (2020). Present Status and Perspective on the Future Use of Aflatoxin Biocontrol Products. Agronomy, 10(4), 491. https://doi.org/10.3390/agronomy10040491

Upcoming Events



13-16th November 2025



Jakarta

With Thanks to Our CONTRIBUTORS



Mr. Ravirajsinh Zala
Purchase Manager Agrocrops





Mr. Manoj
Sales Analyst Agrocrops





Mr. Suresh Kumar R&D Agrocrops





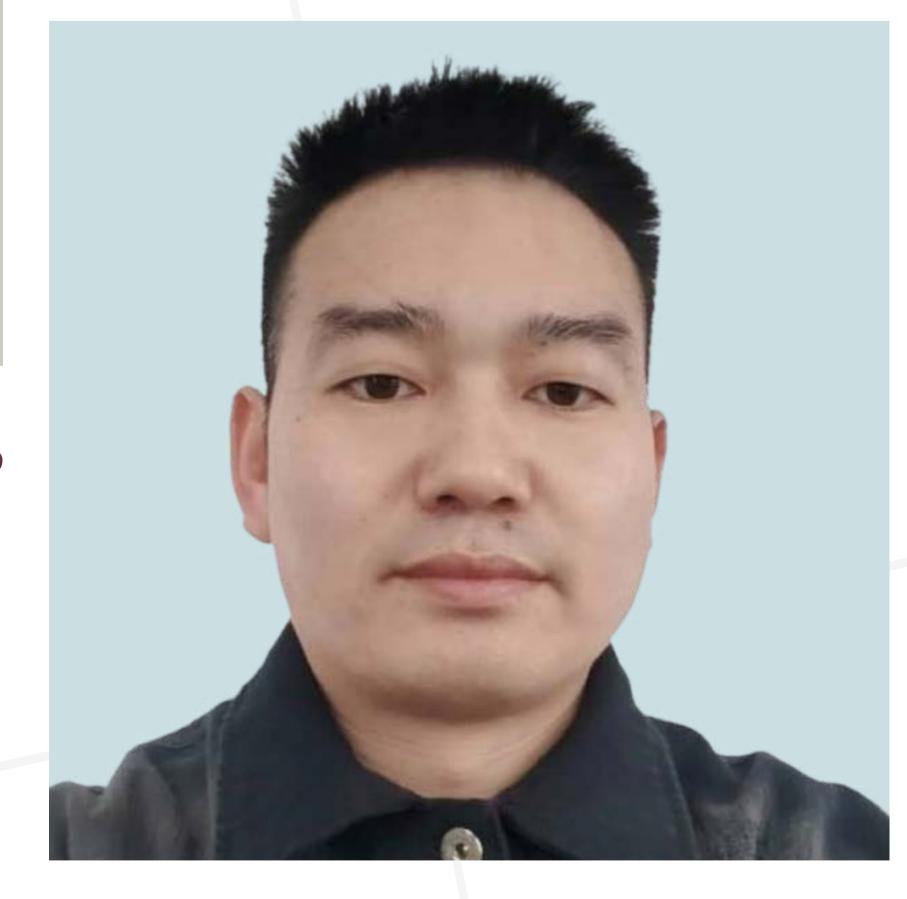
Mr. Jorge Rocha
Sales Manager Samtraco





Mr. Andres Georgalos
DIRECTOR Georgalos Peanut World





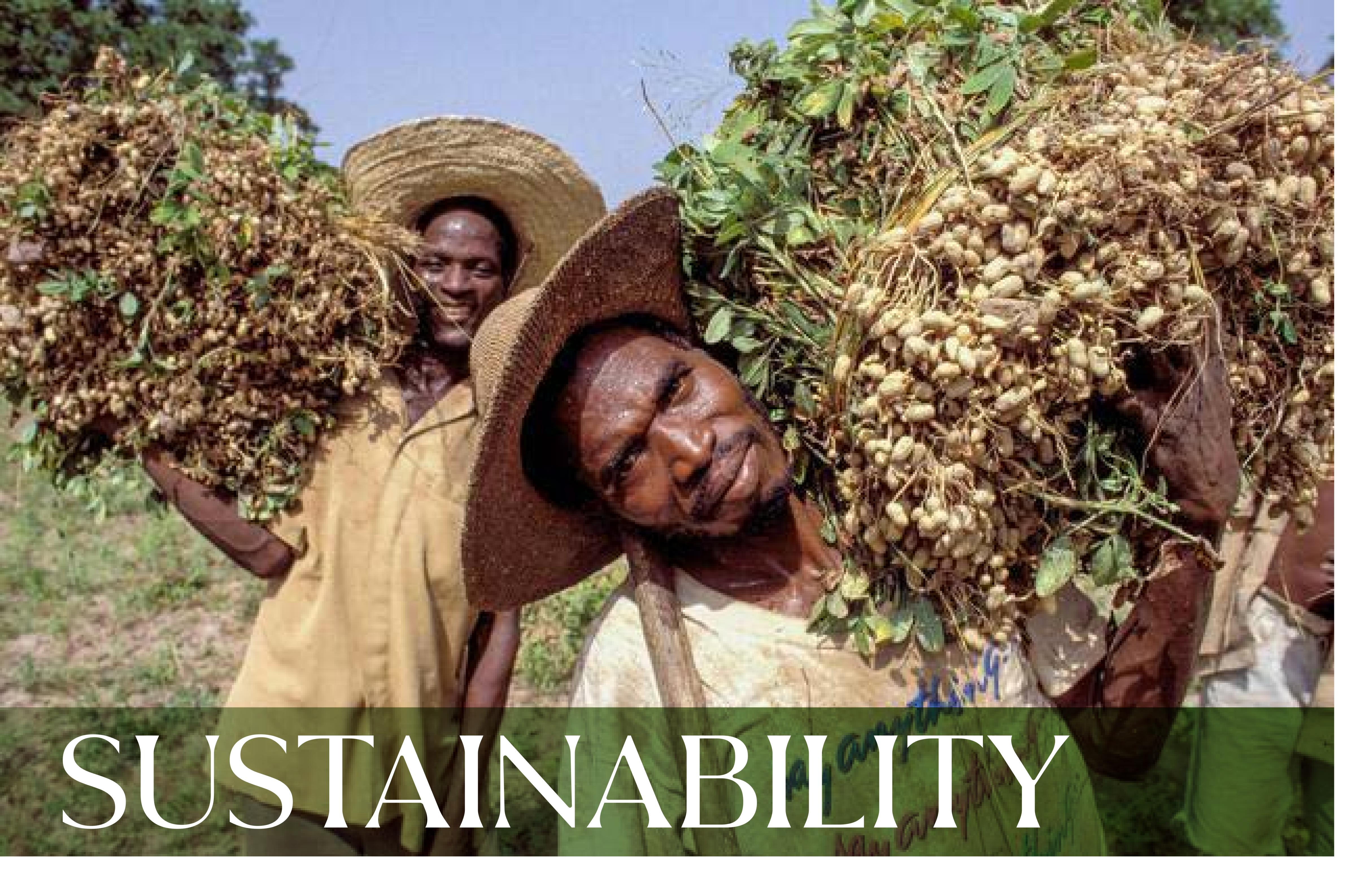
Yan Tao

Manager of HeiLongJiang Heliang

Agriculture



P - 12 Quality Science Contributors Spotlight P - 13



Accountability in Every Kernel:

Sedex as a Gateway to Responsible Sourcing



From Soil to Supply Chain

Every peanut begins its journey in the soil — a story of sun, seed, and human hands. But today, that story doesn't end at harvest. In a world where consumers and global buyers demand to know where their food comes from and how it was produced, accountability has become the new currency of trust. From smallholder farms to large-scale operations, every stage of the peanut's journey tells a deeper story of resilience, innovation, and care for the land. Modern agriculture is no longer just about yield; it's about cultivating transparency, traceability, and sustainability. The soil, once seen only as a starting point, has now become the foundation for building global confidence in the food we share.

The Role of Sedex in Ethical Transformation

Enter Sedex — the Supplier Ethical Data Exchange, a global platform dedicated to improving responsible and sustainable business practices. Built on four pillars — Labour, Health & Safety, Environment, and Business Ethics — Sedex provides a framework that helps the peanut industry strengthen its roots in transparency and integrity. By promoting ethical sourcing and data-driven accountability, Sedex enables companies to identify risks, enhance compliance, and demonstrate measurable progress toward sustainability goals. For peanut growers, processors, and exporters, Sedex isn't just a certification system — it's a gateway to responsible sourcing. It aligns production with international sustainability expectations, ensuring every actor in the value chain is accountable, competitive, and trusted in the global marketplace.



SMETA: Building Verified Trust

At the heart of Sedex lies SMETA — a leading social audit methodology. It evaluates labour conditions, health & safety, environmental practices, and business ethics across peanut farms and processing facilities. For the industry, SMETA ensures sustainability promises are backed by verified action, from ethical labour to safe, efficient operations.

Data, Traceability, and Market Readiness

Sedex and SMETA together strengthen traceability systems that track each kernel's journey — from soil health and irrigation data to post-harvest handling and export documentation.

For exporters, SMETA certification is increasingly becoming a passport to global markets, where ethical verification is a prerequisite for trade.

Collaboration for a Shared Future

The real strength of Sedex lies in collaboration. When farmers, processors, and traders operate under one ethical umbrella, best practices spread faster, partnerships grow stronger, and collective impact becomes visible.

Trust in Every Kernel

The future of the peanut industry isn't defined only by yield or price — it's defined by trust. With Sedex guiding the way, accountability doesn't stop at the factory gate; it travels with every kernel, from the red soils of the farm to tables around the world.

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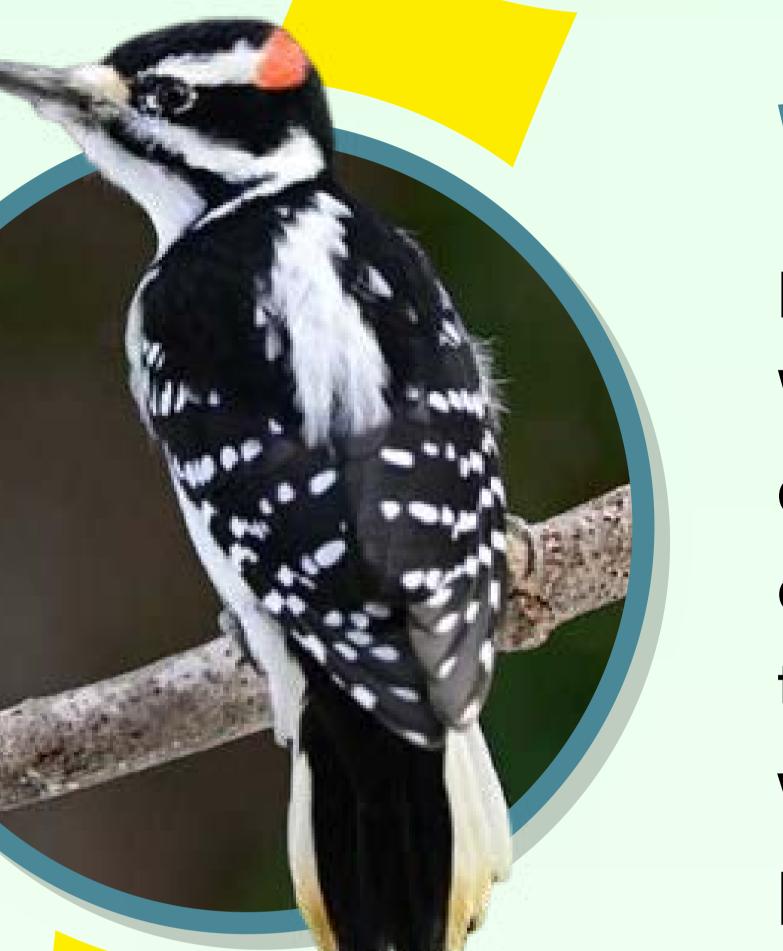
BIRDS I HAILOVE PEANUTS

Peanuts, packed with protein and nutrients, attract a variety of colorful and charming birds. Let's explore some of the top peanut-loving species and their fascinating feeding habits.



Blue Jays

Known for their intelligence and bold personalities, Blue Jays are among the biggest peanut fans. Found across Canada, the United States, and parts of Mexico, these striking blue birds often stash whole peanuts in their throat pouches to hide and eat later—a clever survival strategy. In suburban areas, they're often the first to spot a peanut feeder and will even mimic hawk calls to scare off competitors!



Woodpeckers

From the Downy to the Red-bellied Woodpecker, these drumming specialists are peanut connoisseurs. They prefer shelled or crushed peanuts, which fit neatly into their feeders or tree crevices. During cold winters in Canada and northern Europe, peanuts provide vital fat reserves that keep them warm and active.



Chickadees

Tiny but fearless, Chickadees adore chopped or shelled peanuts. These birds, found across North America and parts of Asia, are acrobatic eaters—often hanging upside down to grab a bite. Studies show that Chickadees can remember thousands of food hiding spots, making peanuts perfect for their stash-andsave feeding style.



Nuthatches

The White-breasted and Red-breasted Nuthatches of North America, and the Eurasian Nuthatch love peanuts, especially when mixed with suet. Their unique upside-down feeding style allows them to access peanut bits others might miss. Common in woodlands and backyards, these birds can visit feeders over 30 times per hour in winter!



Titmice

Tufted Titmice are energetic, soft-voiced songbirds often seen darting to feeders for a quick peanut snack found in the eastern and southern U.S. They prefer shelled, unsalted varieties and will usually carry a peanut to a nearby perch to crack it open. Their quick reflexes and curiosity make them constant entertainment for backyard birdwatchers.



Crows and Ravens

Though larger and less delicate, these intelligent corvids also relish peanuts especially in the shell. Studies show that American Crows can recognize human faces and associate them with food sources, so if you offer peanuts regularly, you might earn their lasting friendship!



House Sparrows and Starlings

These adaptable city dwellers thrive across Europe, Asia, Africa, and the Americas. Crushed peanuts are ideal for them, and they're often among the first to discover a new peanut feeder in urban parks.

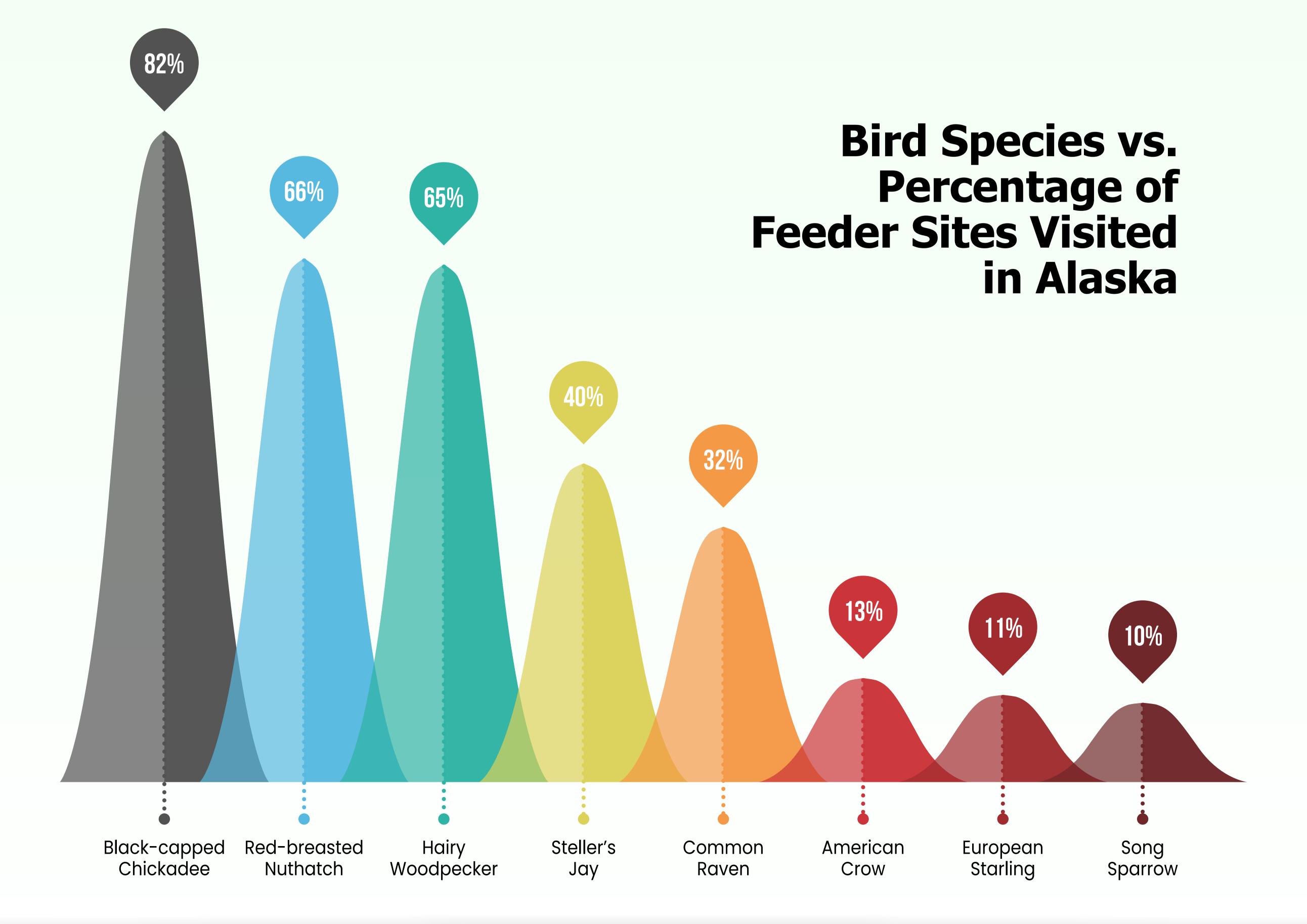


Cardinals

The stunning Northern Cardinal, with its brilliant red feathers, is a backyard favorite in the U.S., Mexico, and parts of Central America. Cardinals favor chopped or shelled peanuts, using their strong conical beaks to crack through the kernels. The highfat peanuts help maintain their color and energy throughout the seasons.



Peanuts not only attract a delightful mix of bird species but also provide essential nutrition—especially in winter when natural food is scarce. So, if you want to turn your backyard into a bustling bird café, simply fill a feeder with unsalted, dry-roasted peanuts and watch the magic unfold!



P - 16 Bird Feed P - 17

Peanut Science

Aflatoxin Challenges into Sustainable Opportunities:

Both were ground and used to partially replace clay in brick manufacturing. The mixtures underwent firing at different temperatures, and their physical and mechanical properties were evaluated using advanced analytical tools such as XRD, XRF, and TGA.

Using a response surface methodology (RSM) approach, researchers optimised the process parameters to balance strength, temperature, and replacement ratio. The results showed that a 6% clay replacement and 725 °C firing temperature achieved the best performance, producing clay bricks with compressive strengths of 109.85 kg/cm²

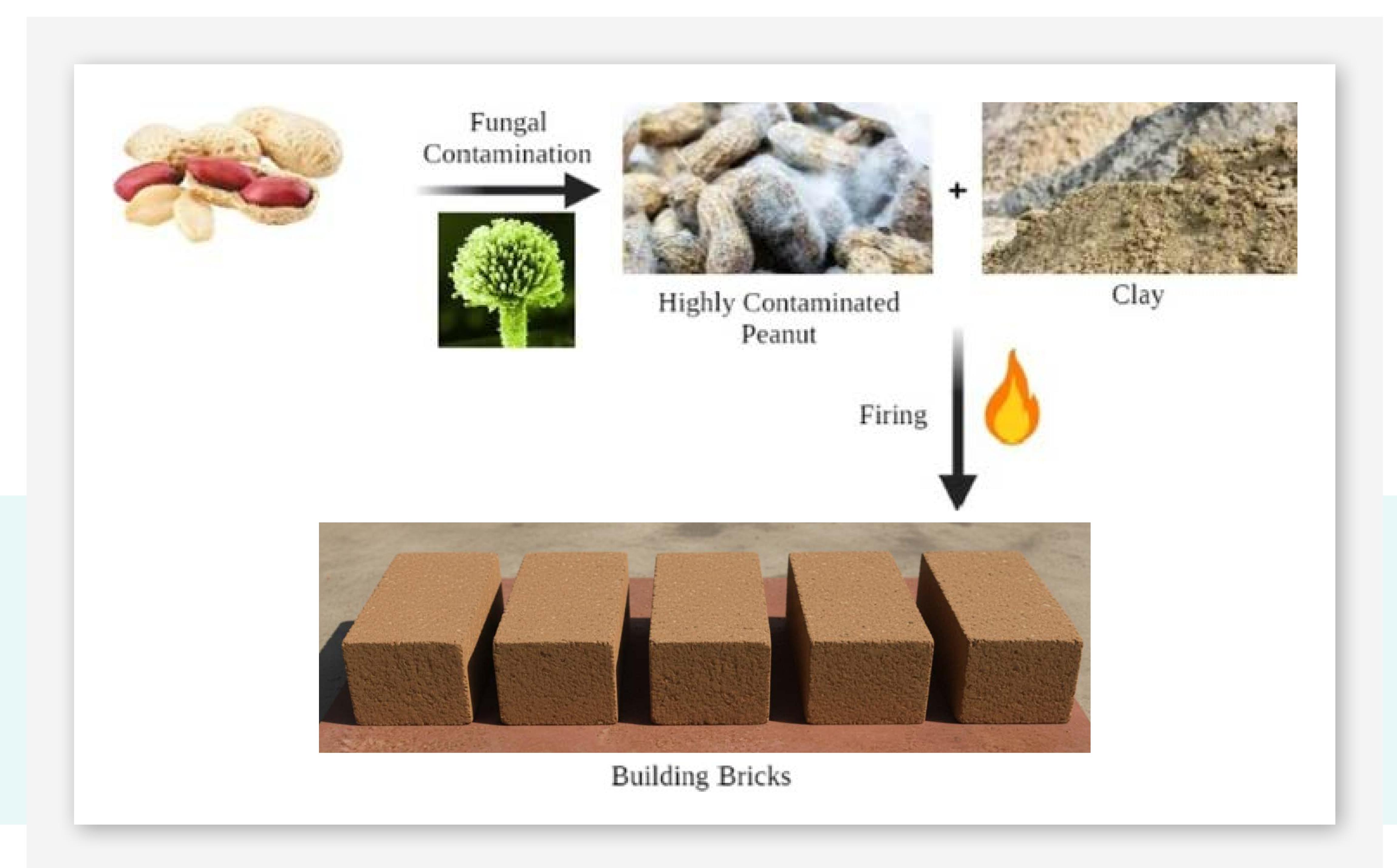
(PA) and 126.33 kg/cm² (PB), both within acceptable construction standards. Importantly, firing at high temperature ensures complete destruction of aflatoxins, eliminating any risk of environmental contamination.

The study emphasised that the primary goal was not to enhance the strength of the bricks but to achieve safe and sustainable disposal of aflatoxin-contaminated peanuts. This approach exemplifies a circular economy solution, turning hazardous agricultural waste into useful building materials. It not only supports environmental protection but also opens new avenues for sustainable waste management and resource recovery in the peanut industry, while reducing the ecological impact of contaminated farm products.

The safe disposal of peanut waste contaminated with aflatoxins remains a major environmental and food safety challenge. Aflatoxins (AFs) are highly toxic mycotoxins produced by moulds such as Aspergillus flavus and A. parasiticus, and they are classified as Group I carcinogens by IARC. AFs are extremely stable under heat, pH changes, and storage conditions, making their elimination from food and feed very difficult. Conventional disposal methods such as incineration or landfilling carry significant risks of toxin release or soil pollution, particularly in developing countries where waste management infrastructure may be limited.

Recent research has explored an innovative and sustainable alternative: recycling contaminated peanuts into clay bricks. In this study, peanuts with high aflatoxin content were categorised into two types:

- PA, the contaminated kernel (without shell), and
- PB, the whole peanut (with shell).





Source: El-Mekkawi, S.A., Sebaei, A.S. & Amin, S.K. Green waste recycling of peanuts highly contaminated with aflatoxins in clay brick manufacturing.

Bull Natl Res Cent 46, 91 (2022).

https://doi.org/10.1186/s42269-022-00780-6

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