

Peanut Wizard Current Crops Shelled Facts Peanut Voice Sustainability

MARKET HIGHLIGHTS

SUPPLY

China

New-crop supply has dropped by over 80-90%, and with limited offers and generally poor quality, old-crop cold-stock prices jumped by roughly 15%. Blanched peanut offers also increased by USD 50-150/MT. Raw kernels, previously trading at USD 1,150-1,175/MT for smaller counts, have risen to around USD 1,250/MT. Most of the small kernels were absorbed by crushers and strong demand from Indonesia. If colder weather arrives and more harvest reaches the market, prices may soften-likely in December-but the probability remains 50:50 due to several uncertain factors.

India

India and China faced similar challenges, with extended and untimely rains severely damaging food-grade peanut quality. The 2024 crop remains available but is mostly crushing grade, priced around USD 900-1,000/MT. Newcrop arrivals up to mid-November have been extremely slow and of very poor quality, with water damage, high aflatoxin, and weak skin/texture as major issues. Despite this, prices surged after Indonesia lifted its import ban on Indian peanuts, pushing offers to USD 1,100-1,250/MT for 80/90 and USD 1,000-1,050/MT for 140/160. Local prices jumped 15% due to sudden Indonesian demand and support from crushers. For now, the market is rising while quality remains extremely weak.

Argentina & Brazil

Suppliers have shifted from a weak to a firm position, supported by lower planting intentions and increased buying interest from China and the EU. Argentina's crushing-grade peanuts were offered at USD 800-900/MT, while food grade moved from USD 1,430-1,515/MT. The 38/42 food-grade offers disappeared quickly and remain high at USD 1,200-1,250/ MT, with 40/50 trading at USD 1,175-1,200/MT. In Brazil, peanut oil prices climbed from USD 1,400 to 1,430 and then to 1,475 due to Chinese demand. Both Argentina and Brazil have non-aflatoxin food-grade material available at very low levels (USD 900-1,000/ MT), which is unsuitable for bird feed and may be used only for domestic crushing.

Indonesia

With stocks completely depleted and prices jumping from USD 1,500/tons to 1,930/tons, buyers began purchasing any peanuts available. Strong demand shifted to origins outside India until the import ban was lifted. Even now, India-Indonesia trade remains cautious, as 80/90 offers at USD 1,050-1,100/MT raise concerns about whether the cost, paperwork, and rejection risks are justified. Several importers tested small OA shipments, while some speculators took large positions. Indonesia also purchased significant volumes of raw peanuts from China at USD 1,300-1,400/MT, although China has limited availability of these sizes due to higher yields in its crop.

China

DEMAND

Oil demand was strong at USD 1,430–1,450, but the market has now turned quiet, with buyers resisting the higher USD 1,450–1,475/MT range. Kernel demand has also softened as local crushers cut prices by USD 30/MT in the third week of November. There is sufficient crushing-quality supply within China's domestic crop. With Chinese New Year preparations underway, any upcoming demand in December–January is likely to focus mainly on high-quality food-grade peanuts.

Vietnam/ Philippines/ Thailand

Despite rising prices and the upcoming festival demand in January and February, the market remains largely unmoved. Vietnamese demand disappeared once Indonesia pushed prices up, the Philippines is flat as it prepares to shut down for the Christmas period, and Thailand—along with several major manufacturers—is barely operating due to strict regulatory pressures. These markets are gradually becoming insignificant.



















PEANUT WIZARD

Here we will discuss how important is rainfall in peanut cultivation



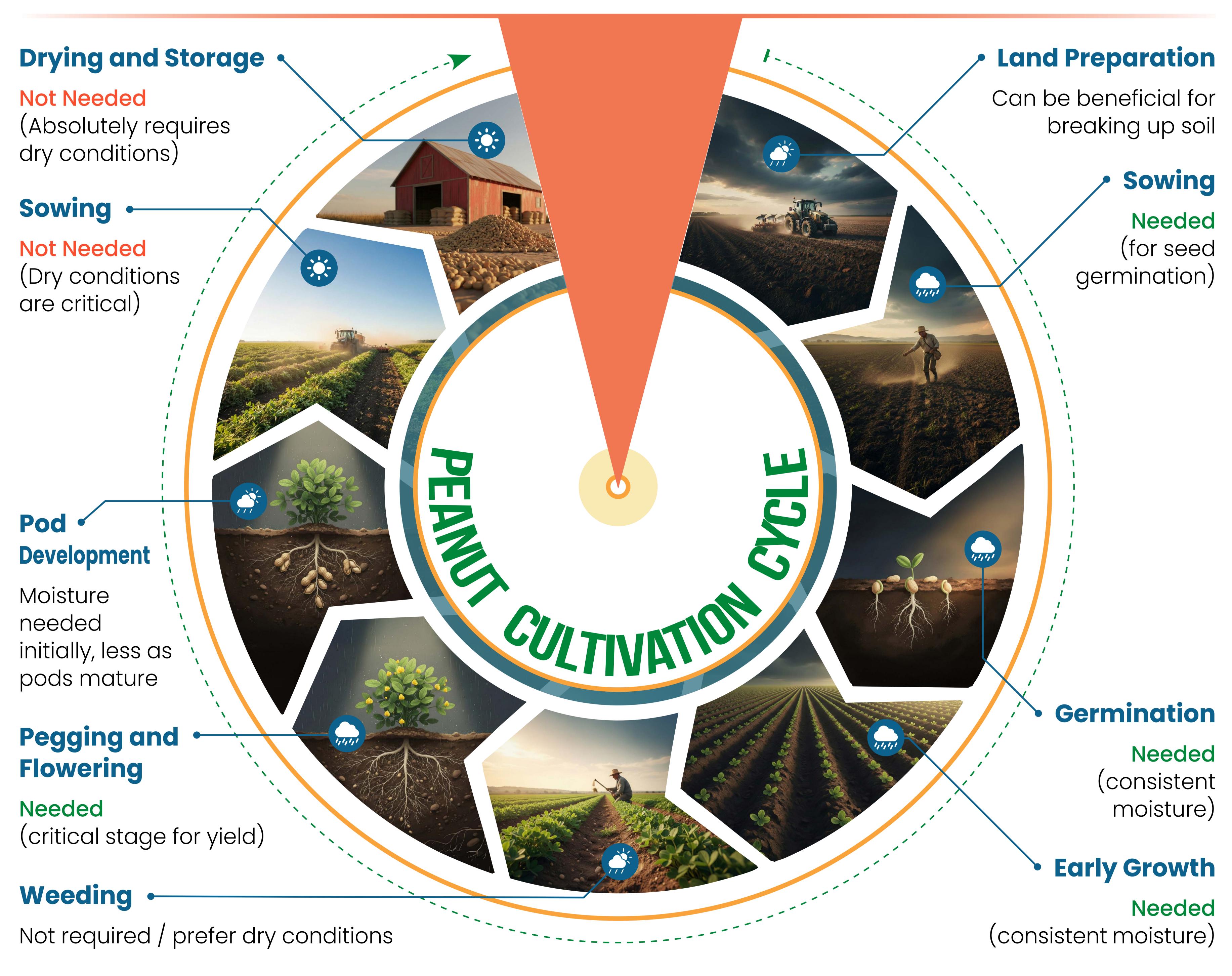
timing is everything in agriculture;

secondly,
the quantum,

and thirdly,
the quality of inputs

together these determine the success of a great harvest.

For a standard, logical cultivation cycle, the sequence and water needs should be:



RAINFALL PATTERNS: RAINFALL ACROSS MAJOR GROWING REGION

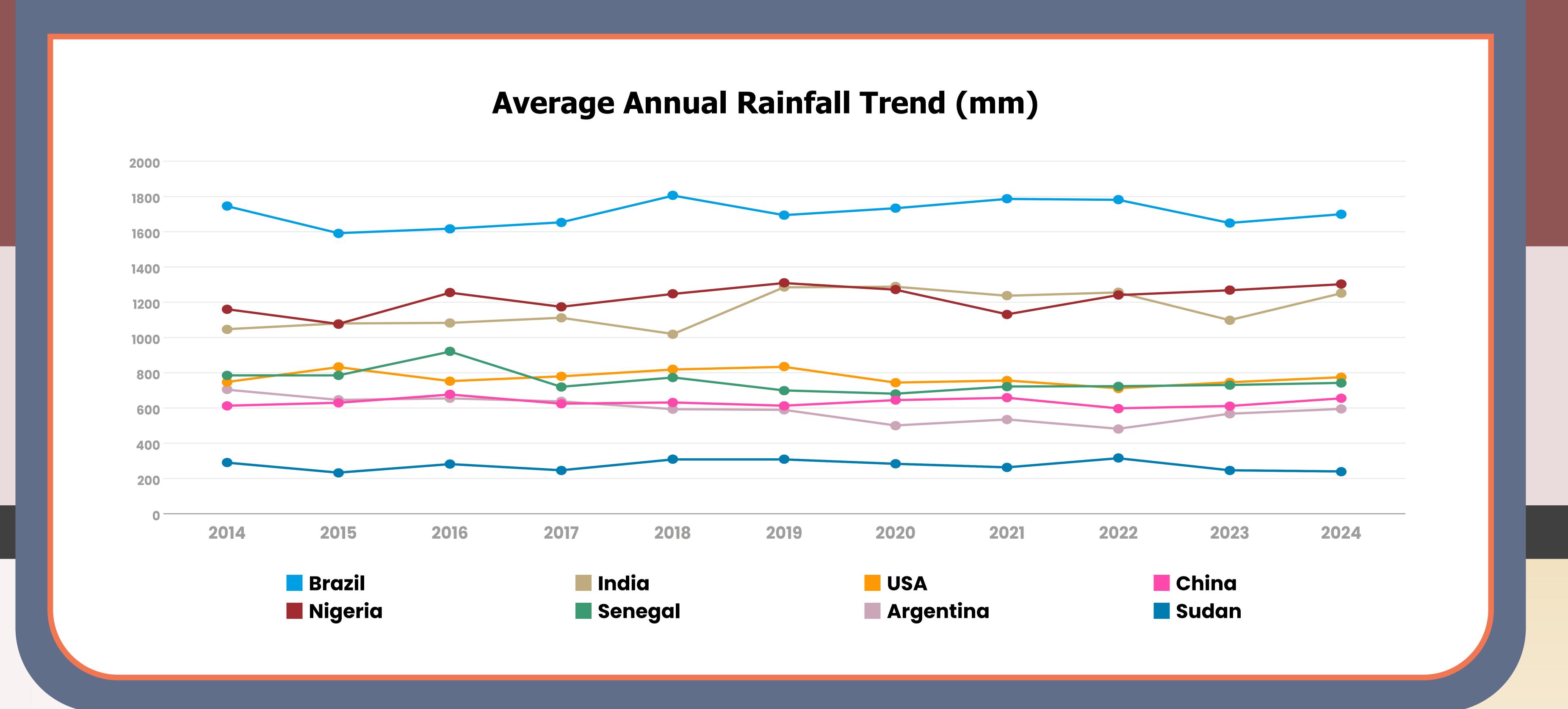
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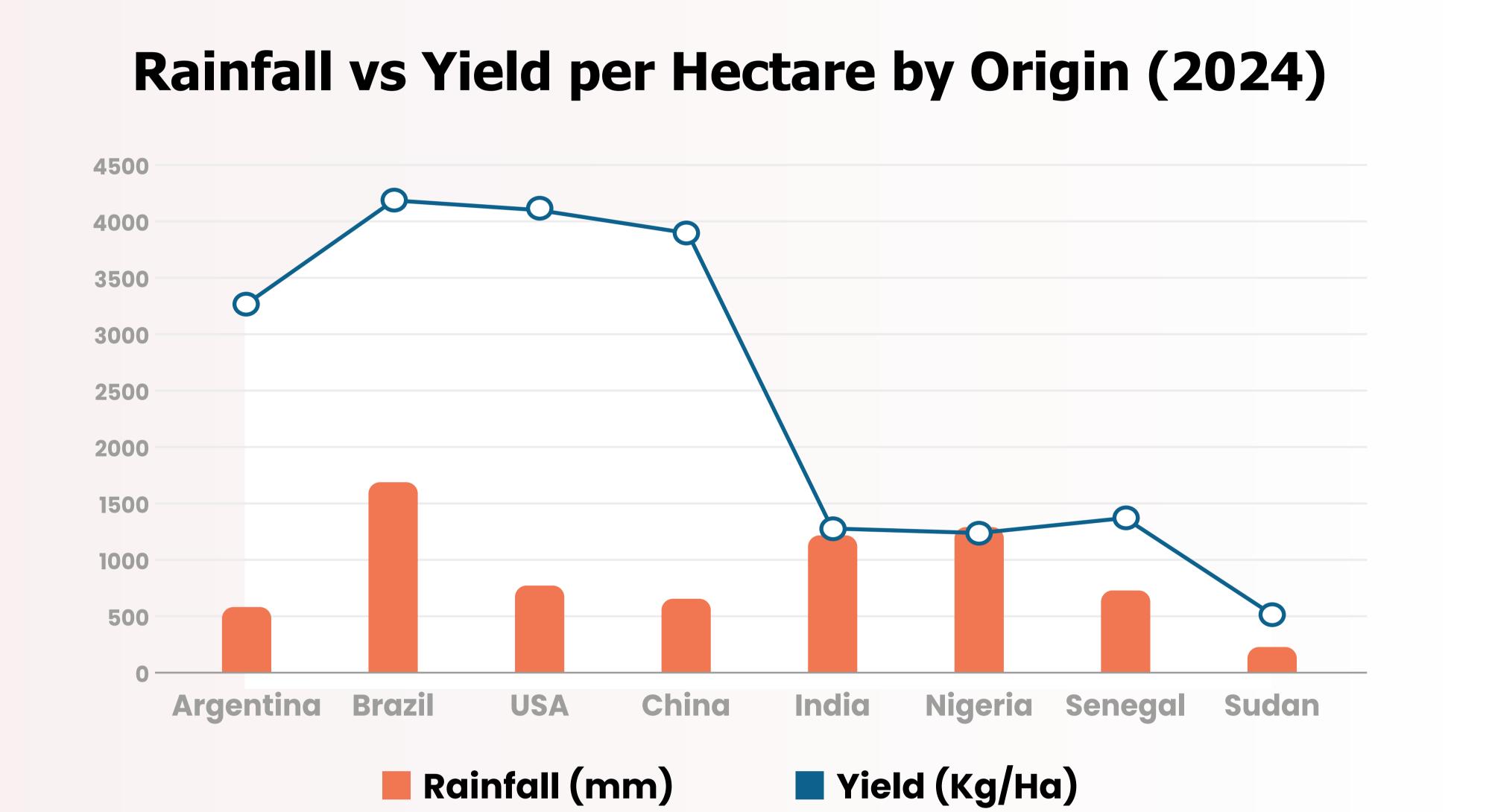
Higher-rainfall origins such as Brazil, India, and Nigeria show greater volatility in yield, even though their overall harvest volumes have been increasing year-on-year.

2

Most high-quality, high-volume peanut-producing regions receive an average annual rainfall of around 600–800 mm.

Regions that consistently produce highquality peanuts typically experience stable rainfall levels — neither too high nor too low — resulting in consistent quality and reduced aflatoxin risk.





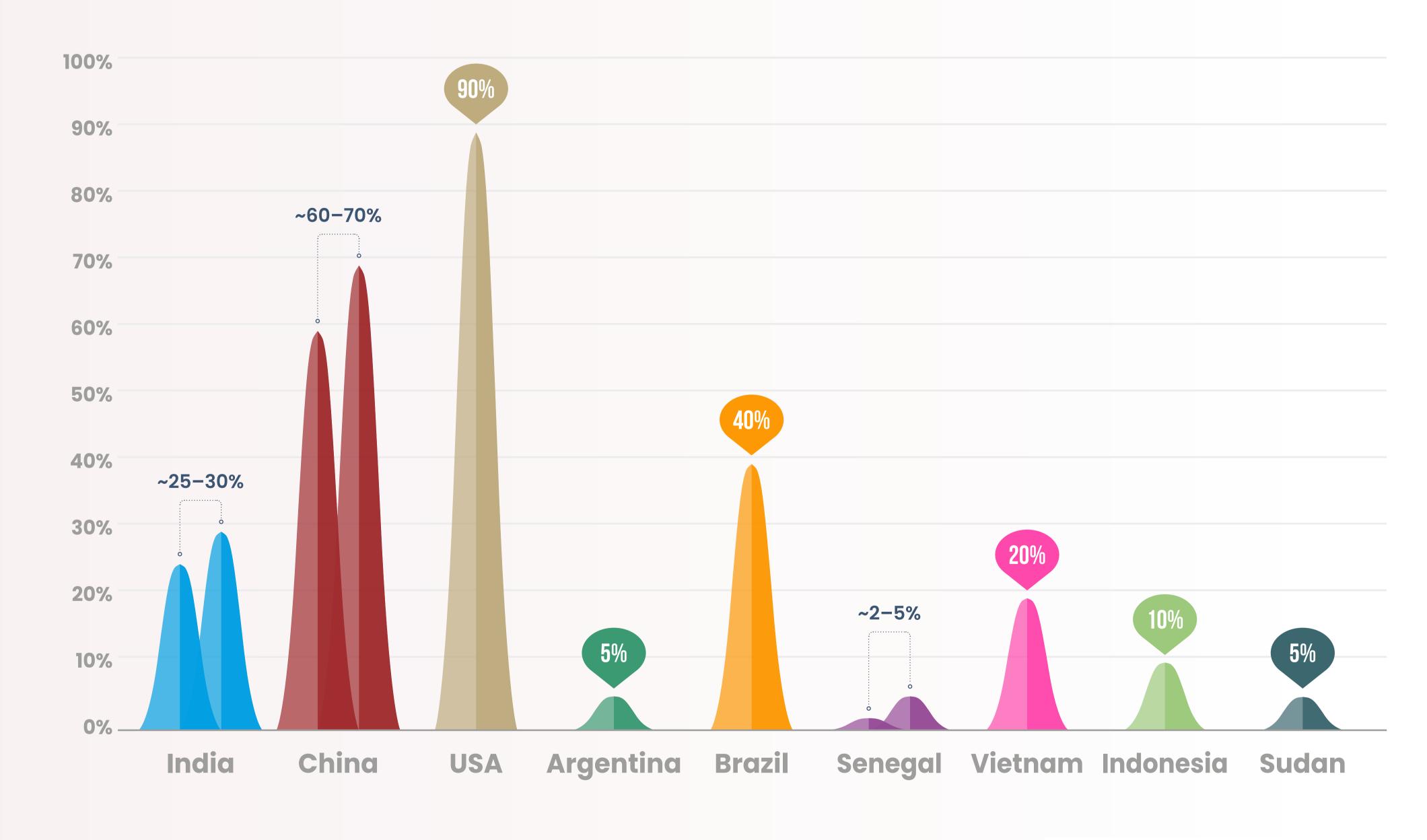
Rainfall and harvested yields

appear to show no direct correlation.
Yield performance is influenced
far more by seed engineering,
genetic quality, farming inputs, and
agricultural practices.

ASSESSING WATER SEGURITY:

HOW SUSTAINABLE ARE THE WATER TABLES IF RAINFALL FAILS?

Graph of Area Under Irrigation by Major Origins



Water Table Depth Across Major Origins

Country	Major Peanut-Growing Region (Primary)	Water Table Depth (m)
Sudan	Kordofan Region	2 to 160
Senegal	Kaolack Region	3 to 60
Nigeria	Kano State	6 to 40
Brazil	São Paulo	5 to 30
USA	Georgia (Southeast Peanut Belt)	3 to 22
India	Gujarat (Saurashtra region)	10 to 20
Argentina	Córdoba Province	5 to 8
China	Shandong Province	2.5 to 5

The water table does not appear to have a direct influence on either the quantity or the quality of peanut crops harvested.

Conclusion:

Peanut crops naturally fluctuate between good and bad seasons, but origins that rely more on irrigation than rain-fed farming consistently achieve better yields, quality, and stability. Many regions with high water tables still depend on rain-fed cultivation due to limited access and weak government support. In large-acreage countries like India, heavy reliance on rainfall combined with high rainfall variability increases production risk, whereas irrigation-heavy origins like China (\$70%) and the USA (\$95%) enjoy far greater cropping certainty. Meanwhile, countries like Brazil and Argentina continue with rain-fed systems, but optimal crop timing—supported by strong local or governmental guidance—is essential to reducing harvest risks.

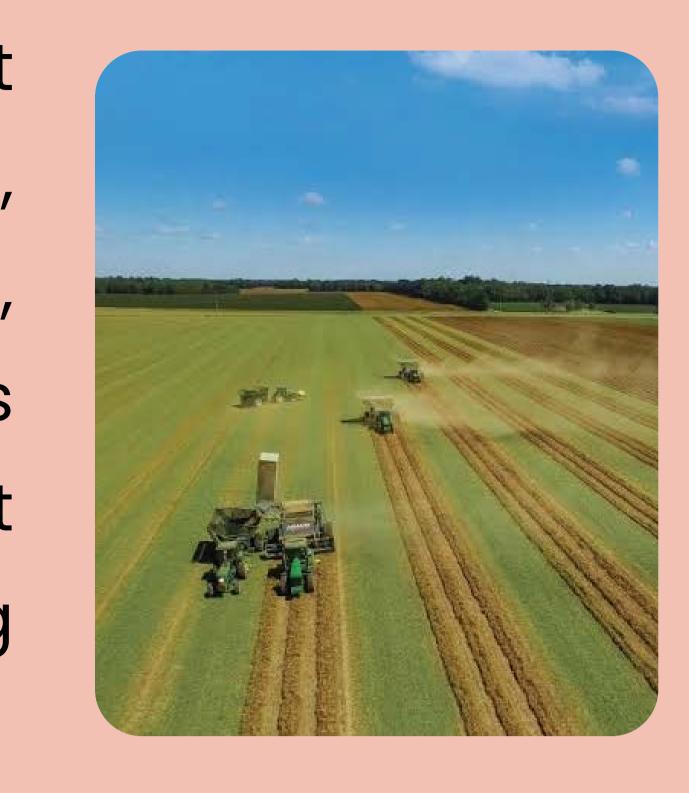
P-4

Argentina's Secretariat of Agriculture (SAGyP) reported on November 20 a 4.3% monthly reduction in the peanut planting estimate, projecting about 450,000 hectares for 2025/26-15.1% below the previous season's 530,000 hectares. Producers have shifted to corn and sunflower due to better margins. The Argentine Peanut Chamber (CAM), however, estimates only 387,245 hectares, 25.7% below last season's 521,229 hectares, creating a major discrepancy. This gap likely reflects CAM's focus on plantings by its sheller members, excluding many independent growers. GPW believes the true planted area lies between 430,000 and 440,000 hectares, considering both sheller-linked and independent production. Sheller-exporters and especially independent farmers—faced with high land rents, lower peanut prices, and rising input costs—have sharply reduced peanut plantings. (Reported by Georgalos Peanut World)



Brazil's new peanut crop is advancing rapidly, with 60-70% of fields already planted and the final areas expected to wrap up by month's end. Mogiana currently leads Alta Paulista, and growers report notably better weather than last year. Still, acreage estimates remain uncertain: some shellers foresee a 30–40% reduction, while cooperatives predict decreases of 15– 30%. Despite this, upcoming weather forecasts look favorable, and optimism is growing about crop development. October brought a strong boost to Brazil's peanut kernel exports, which reached 33,000 tons—up 11% from September and an impressive 85% above October 2024. Year-to-date exports now total 241,000 tons, with 206,000 tons shipped since the start of the crop year in April. With two months remaining, 2025 is already set to rank among Brazil's top five years for kernel export volume. Market shifts included declining shipments to China and the EU, while Algeria and Russia increased purchases. Peanut oil exports surged as well, climbing to 13,600 tons in October-40% higher than September and 340% above October 2024. Total oil exports have reached 121,000 tons, up 174% year-on-year, making 2025 the second-largest year on record. This surge is largely fueled by a greater supply of lowerquality peanuts, ideal for crushing. (Reported by Samtraco)

The 2025 U.S. peanut crop is forecast at 7.47 billion pounds (3.74 million short tons), up 1% from the previous outlook and 15% above the revised 2024 total, potentially setting a new production record. Harvested area remains at 1.90 million acres, 9% higher than last year. The national yield is projected at 3,930 pounds per acre, 40 pounds above the earlier estimate and 207 above 2024. As harvest winds down, late-season drought has reduced quality in rainfed southeastern fields, making careful sorting and shelling essential. (Reported by Georgalos Peanut World)



last another three to four weeks as mildly bullish sentiment. remaining farmer-held stocks move to

groundnut current price levels, leading to inventory exhausted, pushing demand toward market in Gujarat and Rajasthan buildup and slower yard clearance. Gujarat. Java prices remain high on continues to trade on a firm upward Kutch still holds substantial on-farm stronglocal demand. Karnataka shows trend, supported by steady government stocks, indicating steady arrivals for similar conditions. Telangana has partial procurement of in-shell material. nearly two more months. Junagadh arrivals expected from mid-January, Widespread rain damage has reduced and Keshod are witnessing mixed- whileOdishagearsupforsowing, relying the availability of premium sowing- quality G20 arrivals, with premium lots heavily on seed supplies from Gujarat quality lots, increasing buying interest diverted to government procurement; and Rajasthan. from traders and stockists. Export once improved-quality G20 supplies demand—especially from Indonesia— increaseafter10December,someselling remains active despite stricter APEDA pressure may emerge. Procurement compliance requirements. Pathawada is expected to continue through late continues to see arrivals, which should January, maintaining a constructive,

market. In contrast, farmers in Rajkot In the South, Tamil Nadu is preparing and Gondal are withholding produce at for new-crop sowing with stocks nearly



DTHES

Indonesia Market demand remains strong due to extremely limited availability. At the moment, only China-origin cargo and India-origin cargo routed through Dumai are viable options, and buyers are continuously inquiring about shipments. Some importers report that India has begun loading under new regulations, but reliable information is scarce—even our India office has no clear confirmation.

Meanwhile, some buyers have shifted entirely to blanched peanuts. With prices at their peak, many new players are entering the market asking about supply and pricing, though their level of commitment remains uncertain.

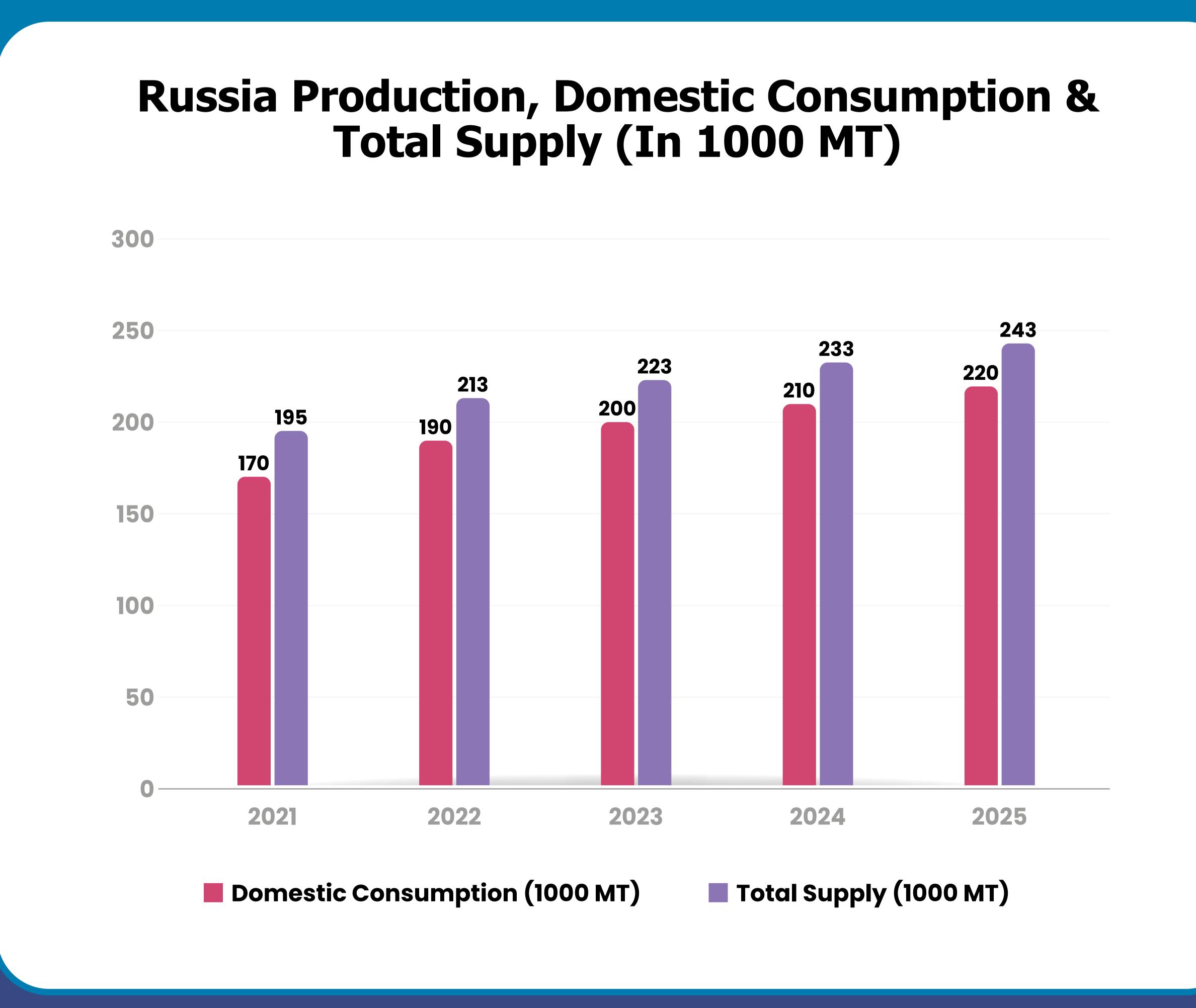
Senegal The government announced in late December that it will authorize the export of 250,000 tons this season.

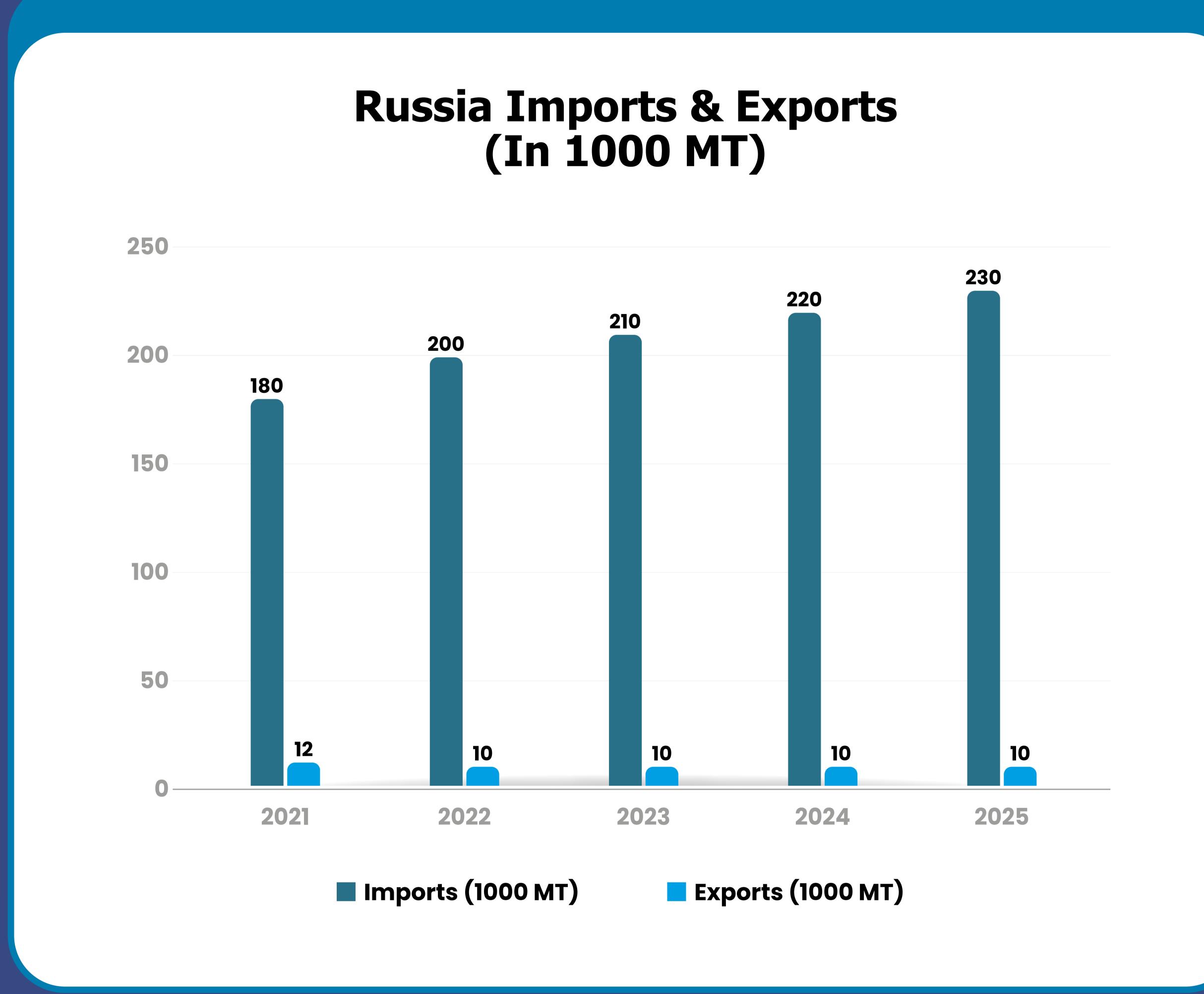


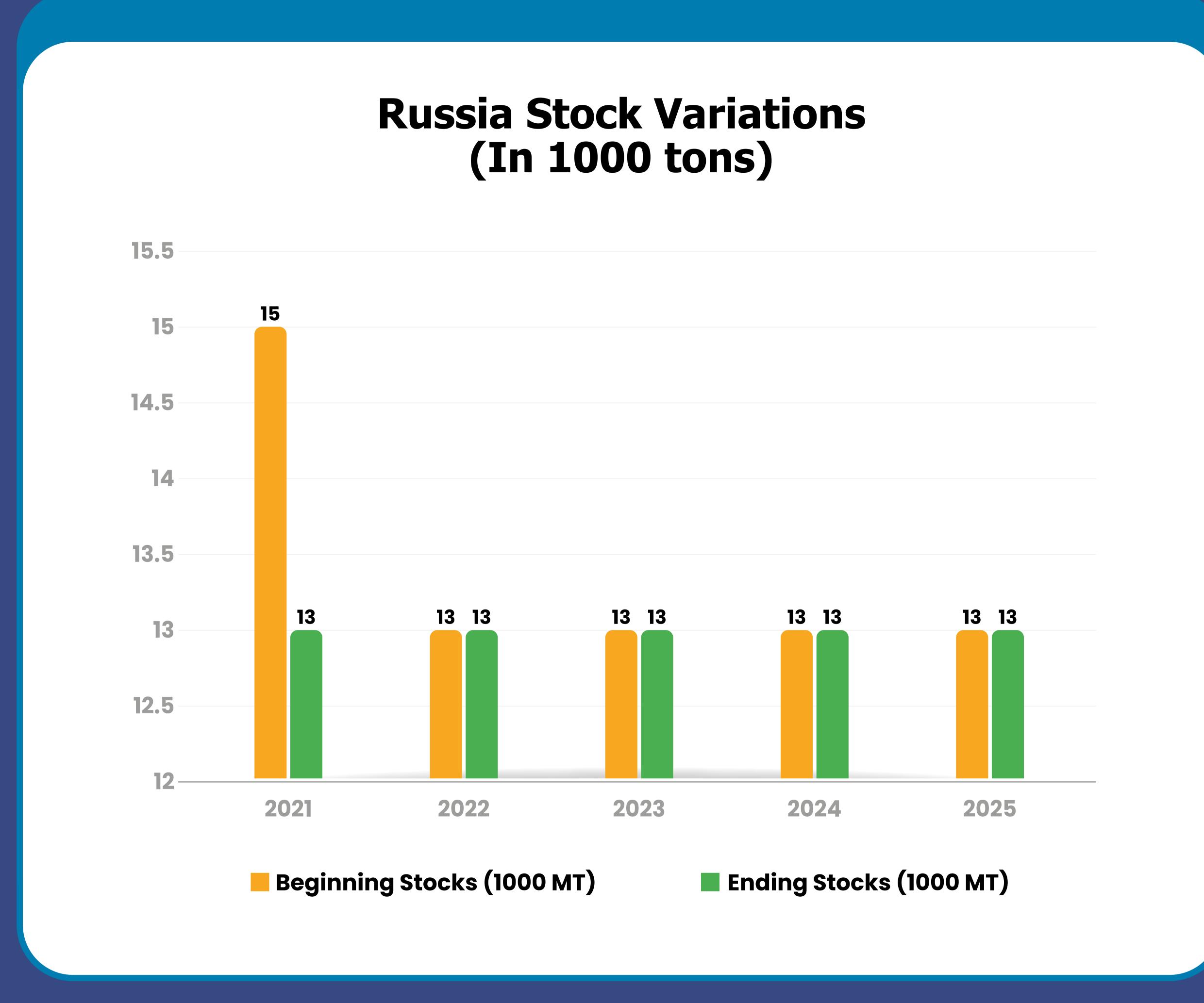
Domestic peanut prices have remained generally stable, though Northeastern values have hit a "price ceiling." Buyers there are cautious, holding inventories CHINA rather than purchasing, and even essential buyers are seeking cheaper alternatives from other regions, leaving high-priced Northeast peanuts with minimal trading. In Henan, wide price gaps and speculative pressure from the Northeast have made farmers reluctant to sell high-quality peanuts, prompting modest price rebounds. Oil mills largely remain on the sidelines, and logistical delays—slow unloading and congestion—are capping further gains. Other regions show steady to slightly firmer prices, with small increases for premium grades. Since harvest began, Henan's price path matched expectations, while the Northeast's sharp rally surprised the market. Analysts cite strong holding behavior by farmers and traders, speculative capital inflows, and delayed Henan supplies dominated by oilseed peanuts. Yet soaring prices have drained liquidity. Ahead, Northeast markets face growing risks, while Henan may see gradual recoveries, though quality issues and potential supply releases limit upside.

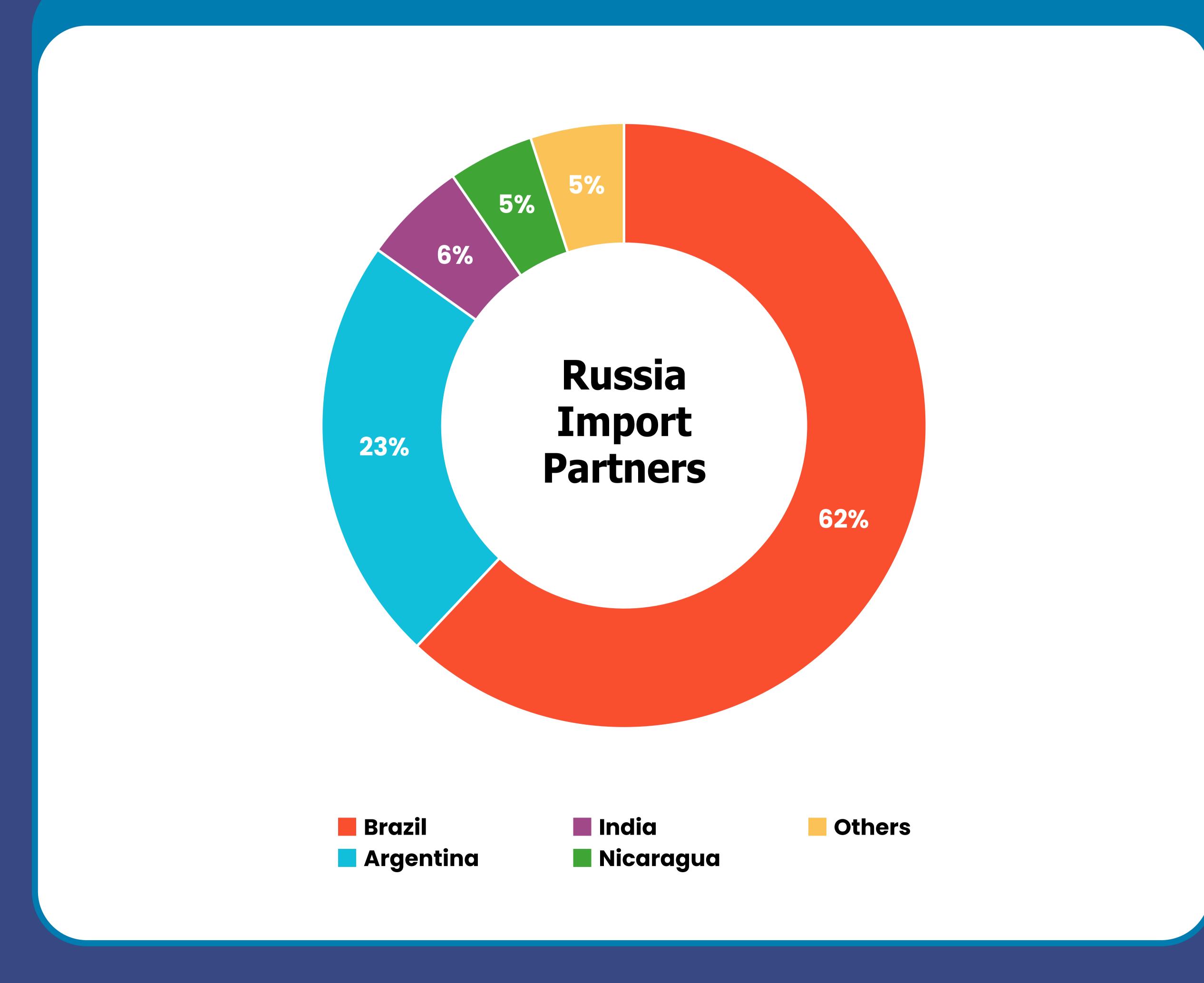
Global Markets P-7 P - 6

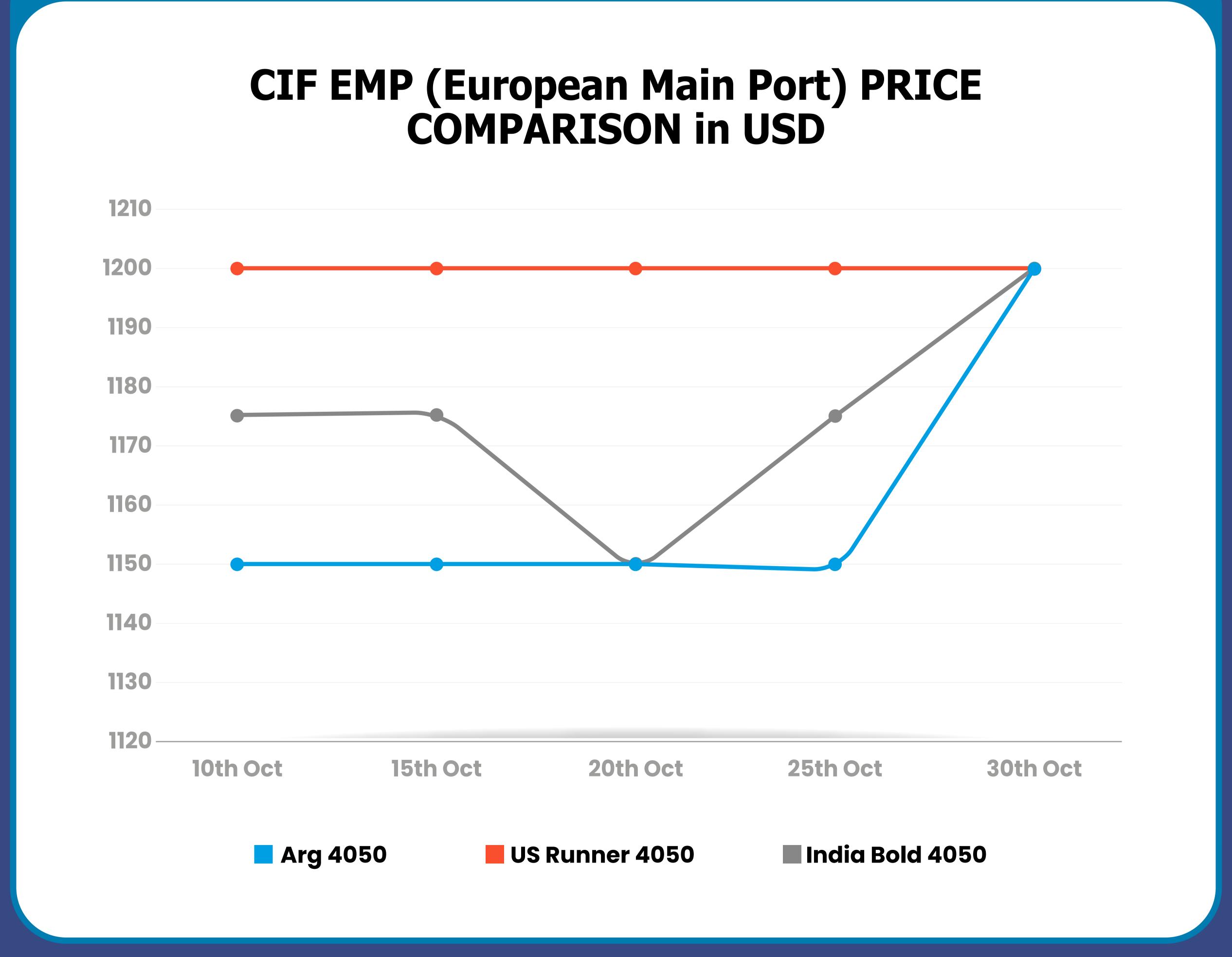
RUSSIA DEMAND & SUPPLY

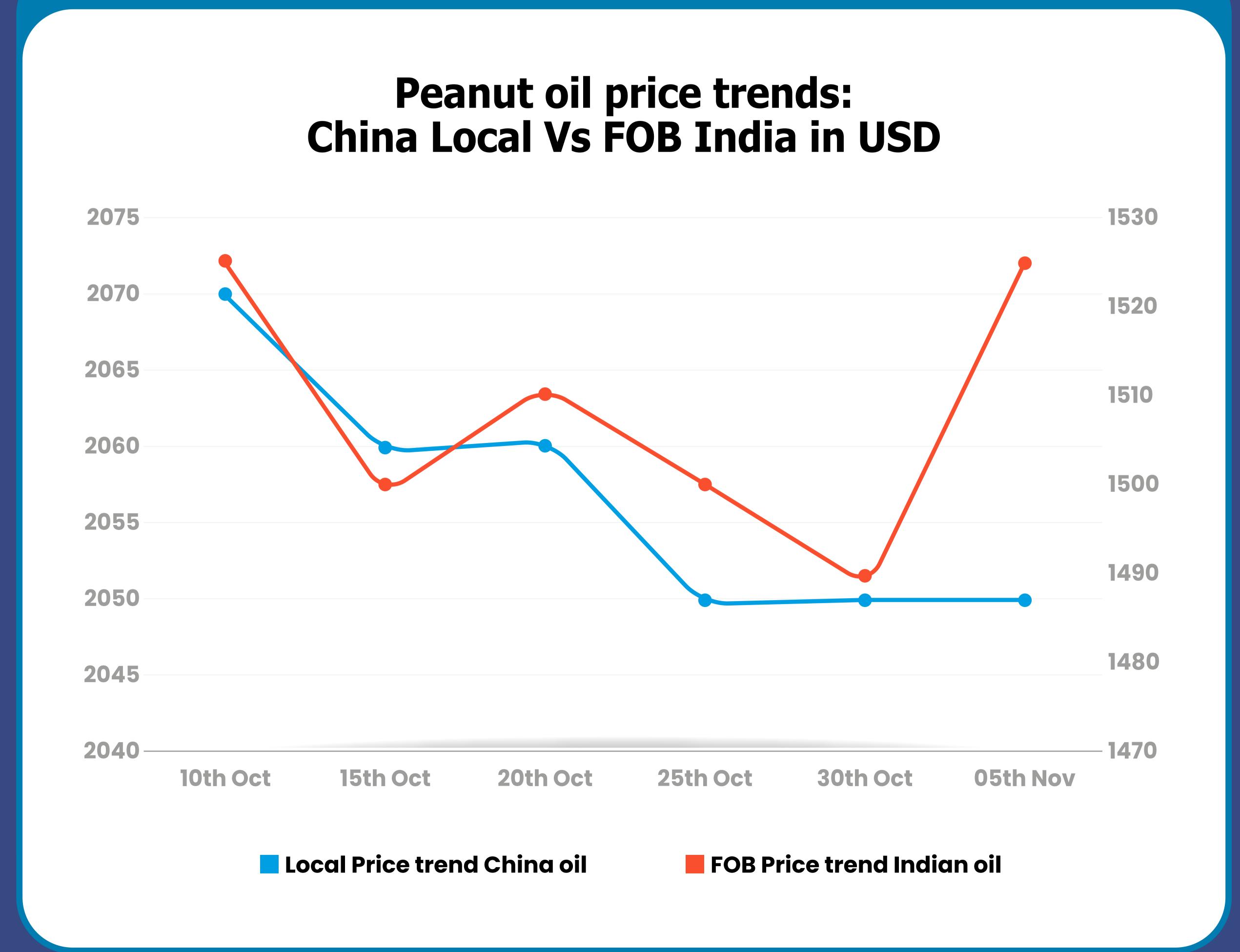












Gurrent ARG ARG 4050 - \$1250 A Argentina Upcoming acreage is down 15%, with significantly less area planted than last season. BRA BRA 4050 - \$1180 🛕 New-season planting is down 35%. CHI CHI 41/51 - \$1560 🛕 Rains in Henan and Shandong have led to widespread high aflatoxin in the new crop. Incoming G20 groundnut lots are showing aflatoxin issues, raising quality concerns. Peanut harvest is complete, yielding an average-quality crop.

CERNIT VOICE

66 I bring 20 years of expertise in the Indian peanut industry, with deep specialization in pan-India strategic sourcing and strong relationships with farmers, mandis, and brokers.

Daman Chand
Sales/Procurement
Manager
Agrocrops



Peanut production in India has shifted a lot in the last decade — more areaunderirrigation, better high-yield seed varieties, improved grading/processing, and higher focus on export quality. Also, market linkages and farmer mechanization have increased, making production more organized and consistent.

Climate Change Impact on Peanut Farming: Rising Heat, Falling Yields!

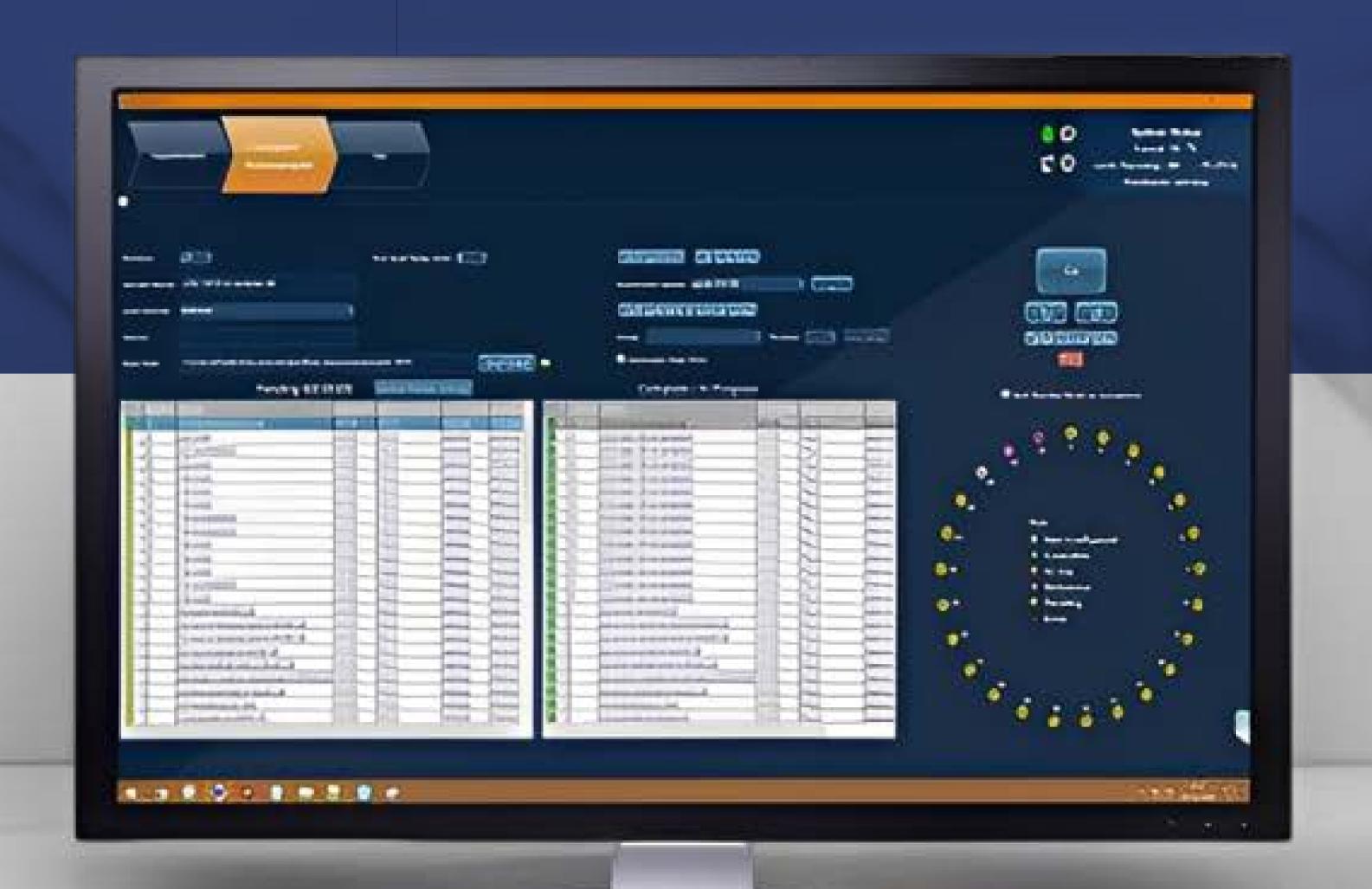
Peanut plants may look resilient, but heat quietly attacks their most fragile stage: pollination. Short bursts at 38°C don't stop flowering, yet they dramatically reduce how many flowers turn into pegs. As temperatures rise from 28°C to 48°C, pollen quantity and quality drop 3.9% and 1.9% per degree, while extreme warm nights can slash pollen counts from 4,389 to just 2,800 per flower. Once the thermometer crosses 34°C, pollen damage accelerates, pod formation collapses, and yield losses surge.

Heatstress already threatens 15–30% yield loss in major peanut-growing regions, translating to billions in global economic impact as edible oil supply tightens, export quality declines, and farmer incomes shrink. With peanuts feeding over 300 million people and supporting major industries, rising temperatures pose a direct risk to future food security.



P - 10

Current Crops P - 11





Mineral oil contamination has become one of the most disruptive quality challenges in the edible oil sector. For peanut oil processors, especially exporters, MOSH and MOAH contamination now sits beside aflatoxin as a top reason for container rejections and brand-reputation damage. With global regulations tightening, the peanut industry must understand how contamination occurs and adopt stronger, more future-ready control systems.

INVISIBLE ENTRIES: HOW MINERAL OIL SLIPS INTO PEANUT OIL

Mineral oil hydrocarbons can enter peanuts at multiple points. Packaging materials such as recycled corrugated boxes, low-grade jute sacks, and printed liners may leach contaminants into raw groundnuts. Inside factories, the risk rises through leaking bearings, gear lubricants, hydraulic oils, and worn expeller seals, sometimes introducing contamination too small to notice but large enough to fail export limits. Transport and storage also contribute, especially when tankers or drums previously carried petroleum-based materials. These "silent" entry points create contamination that is difficult to trace but easy to detect in finished oil.

WHY IT MATTERS: HEALTH, COMPLIANCE & BUSINESS **FALLOUT**

MOAH, the aromatic fraction of mineral oil, has become a global red flag due to potential carcinogenic risk. Many countries, especially in the EU and Asia, follow a near-zero tolerance policy.

This leads to:

- Costly port rejections even for contamination at $0.5-1 \,\mathrm{mg/kg}$
- Loss of premium positioning for cold-pressed oils
- Market withdrawals and brand damage, affecting long-term trust
- Increased production cost, as tighter monitoring and reprocessing become necessary

With peanut oil consumption rising globally, these risks directly impact processors, exporters, farmers, and retailers.

SMARTER DETECTION: NMR LEADS THE NEXT QUALITY REVOLUTION

Traditionally, mineral oil analysis relies on LC-GC-FID, a multi-step method requiring extraction, cleanup, and skilled operation. While accurate, it is time-consuming. Recent studies highlight NMR (Nuclear Magnetic Resonance) as a faster, cleaner, and more reliable option. NMR requires minimal sample preparation, clearly distinguishes aromatic MOAH signals, and delivers high sensitivity without complex chemical steps. This makes it ideal for rapid screening during processing, tanker loading, and pre-export checks.





2 - 4 December 2025



Fi Europe, Paris

With Thanks to Our CONTRIBUTORS



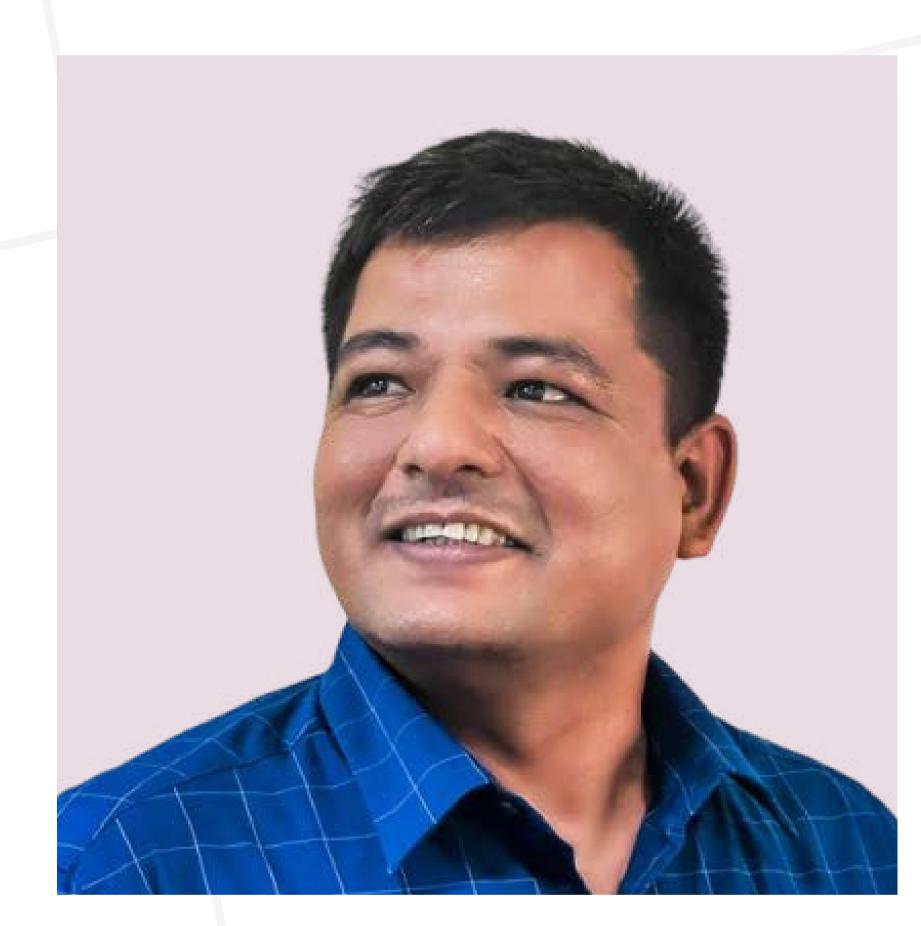
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Mr. Manoj Sales Analyst Agrocrops

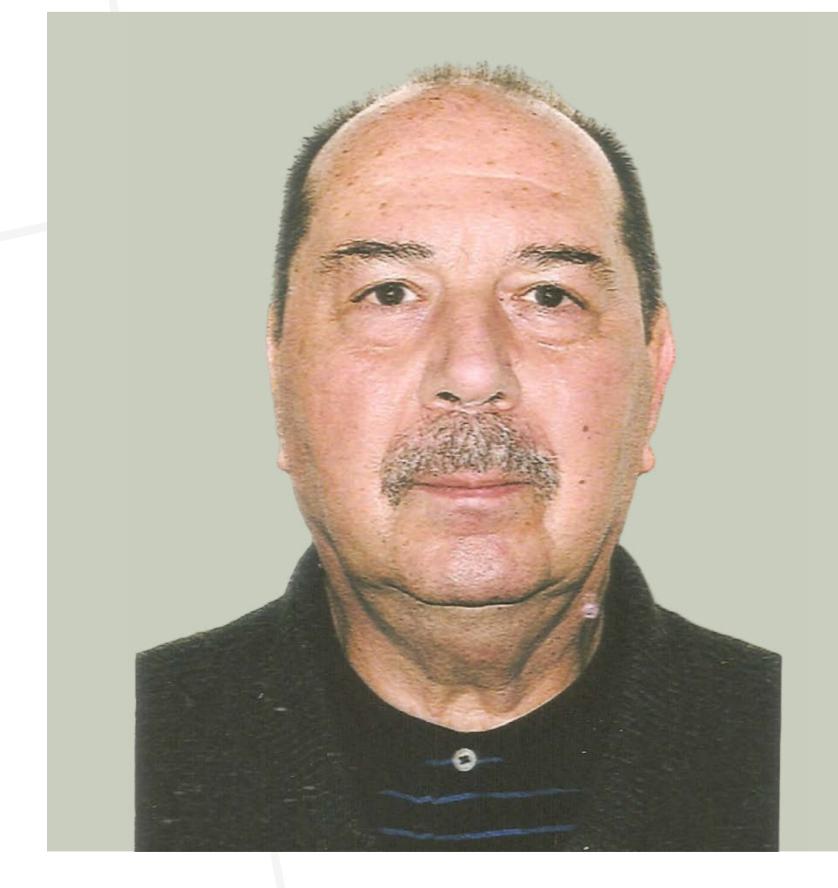


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The Microbial Symphony: Peanuts and the Invisible World of

The Underground Network

Regeneration

Beneath every peanut field lies an unseen world – a living network of microscopic life that quietly sustains the planet. This is the rhizosphere, the soil zone surrounding peanut roots where countless microbes interact, exchange nutrients, and build resilience into the earth itself.

Peanuts, being legumes, form a particularly special relationship with soil bacteria. Within tiny nodules on their roots live Rhizobium microbes — nature's nitrogen factories. These microscopic allies capture nitrogen from the air and convert it into nutrients that the plant can absorb. In return, the plant provides them with sugars and shelter. It's a beautiful example of mutualism, a partnership that nourishes not just the peanut crop but also the soil for future generations of plants.

Harnessing Microbial Intelligence

This natural process is inspiring a new wave of sustainable agriculture. Scientists are studying peanut rhizospheres to

design biofertilizers — living soil boosters that mimic these microbial interactions. Instead of relying on chemical fertilizers, farmers can enrich their fields with beneficial bacteria and fungi that support soil health, improve water retention, and even protect crops from disease.

The "microbial intelligence" of peanuts offers valuable lessons in regenerative farming systems that heal the land rather than deplete it. By understanding how peanut roots orchestrate this microbial symphony, we can tap into natural soil processes that build fertility and reduce our dependence on synthetic inputs.

Farming in Harmony with Micro-Life

Every time a farmer plants peanuts, they're not just growing food they're nurturing a living ecosystem beneath the surface. Earthworms, nematodes, fungi, and bacteria all play their part in this hidden harmony, breaking down organic matter and recycling nutrients.

When managed sustainably, peanut cultivation becomes a model for living soils - dynamic, self-renewing environments that sustain crops year after year. It's a reminder that sustainability begins not only with what we plant, but with what we allow to thrive unseen — the invisible communities that make life possible beneath our feet.



10 MYTHS ABOUT FEEDING PEANUTS TO BIRDS CRACKING THE SHELL ON THE TRUTH!



by garden birds everywhere. But for something so small, there's a lot of confusion around them. From the "healthy roasted nut" myth to tales of birds forming peanut addiction support groups, it's time to separate fact from feathered fiction. Let's bust the ten most common myths about feeding peanuts with a few laughs along the way.

"Any peanuts are fine for birds."

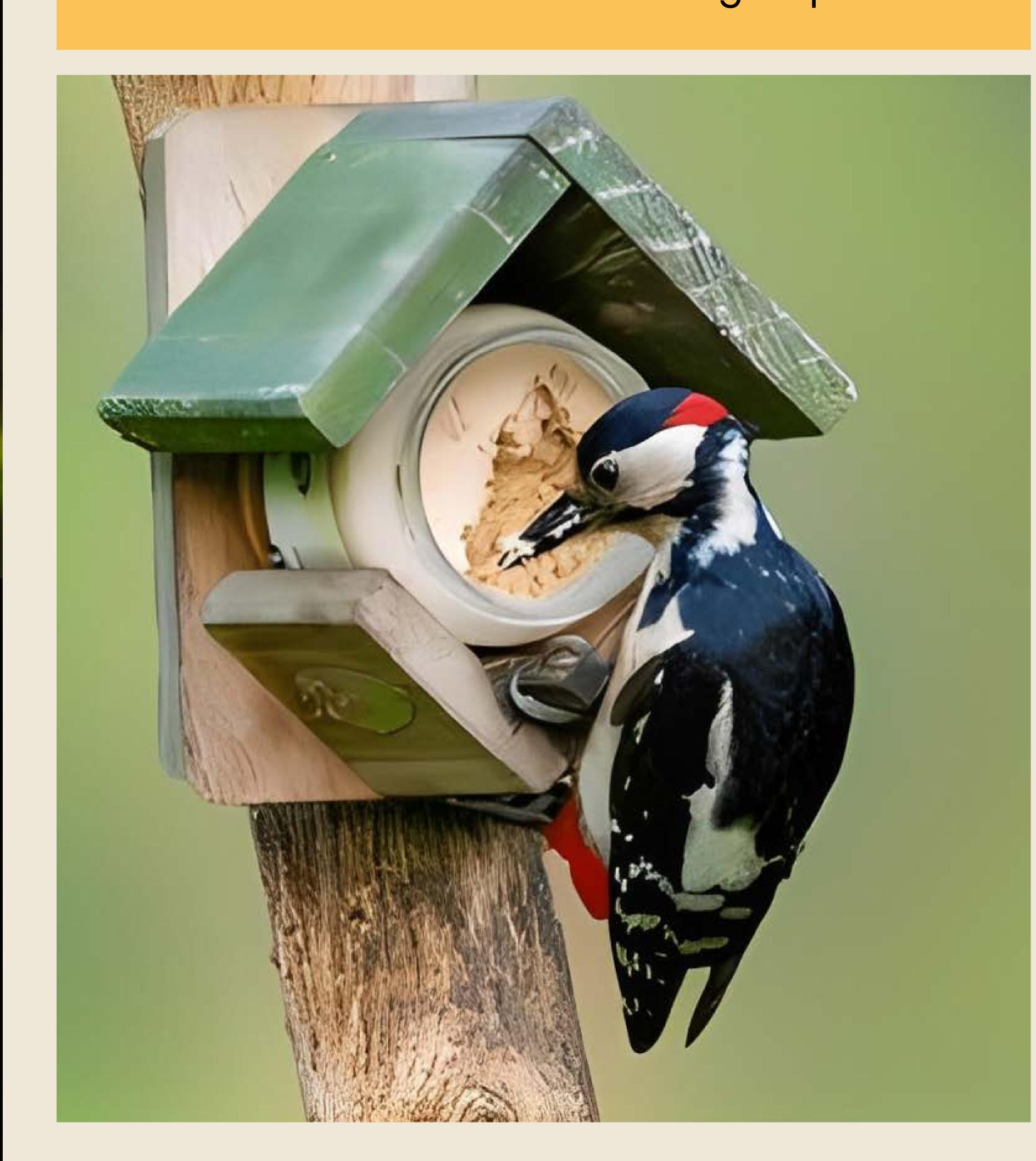
Not quite! Birds can't read packaging, but you should.
Only aflatoxin-tested, unsalted, raw peanuts are safe. The wrong type can contain toxins invisible to the eye but deadly to birds. Always check the label your garden choir will thank you.

"Roastedpeanutsarehealthier."

They're great for movie night, not for bird dinner. Roasting destroys nutrients and often adds salt or oil. Birds prefer their peanuts raw and wholesome — no seasoning required.

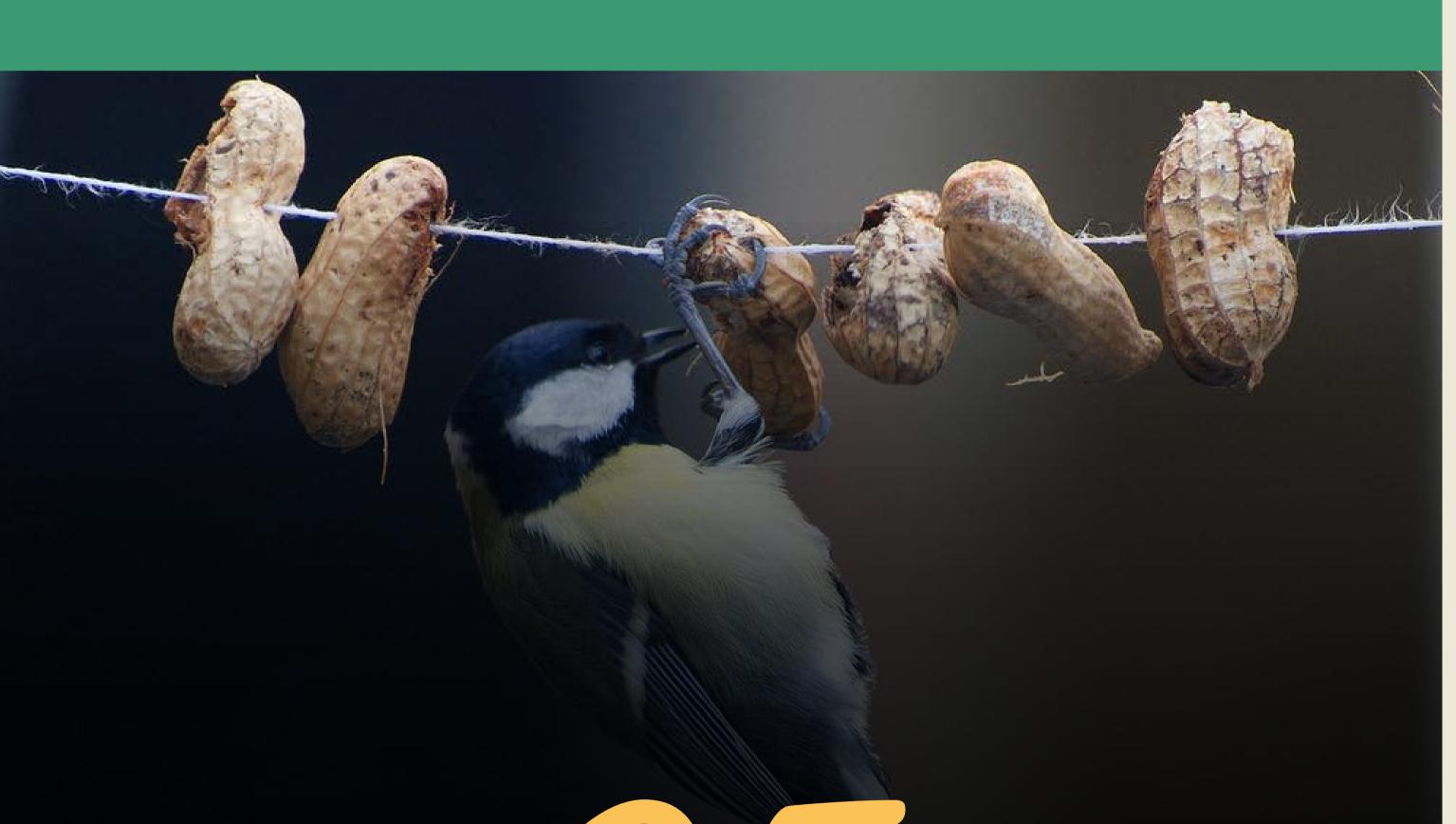
"Peanut butter causes birds to choke."

They're great for movie night, not for bird dinner. Roasting destroys nutrients and often adds salt or oil. Birds prefer their peanuts raw and wholesome no seasoning required.



"Feeding peanuts makes birds dependent on humans."

Don't worry — birds are smart. Feeders are more like pop-up cafés than full-time restaurants. Birds still forage naturally; your peanuts just make life a bit easier during tough seasons.



"Peanuts can replace a varied bird diet."

Even peanuts can't do it all! Birds need variety — seeds, insects, suet, and fruit — to stay healthy. Think of peanuts as the protein bar, not the entire menu.

"Birds share peanuts nicely."

If only! Watch your feeder during rush hour — it's more like a feathery food fight. To keep the peace, add multiple feeders or refill often.

"If I fill the feeder, the birds will come instantly."

They will... eventually. Birds are cautious little critics; it can take a few days for them to trust a new spot. Be patient — once word spreads, you'll have a crowd.



"Only one kind of bird likes peanuts."

Hardly! Blue tits, woodpeckers, finches, and even robins love peanuts. It's basically bird-world's version of universal currency.

"If I stop feeding peanuts, the birds will move out."

They won't pack their suitcases! Birds simply forage elsewhere until you're open again. No guilt trips—they always come back for a good snack.

"My peanut feeder is indestructible."

Ha! Tell that to the squirrels. They see your "squirrelproof" feeder as a personal challenge. Consider them the acrobatic comedians of your garden show.

Final Chirp:

Peanuts are a powerful, nutritious treat — but feeding them the right way makes all the difference. Choose aflatoxin-tested nuts, offer variety, and laugh at the chaos around your feeder. After all, half the fun of bird feeding is the feathered drama that comes with it!

P - 16

JAPAN'S HEAT-RESILIENT HELP SAVE GLOBAL YIELDS





Rising Heat, Rising Risks

Heat is becoming one of the biggest invisible threats to global peanut production, and the impact is already being felt in major growing regions like South Carolina. Peanuts aren't just a crop here; they are a critical economic driver.In 2024 alone, South Carolina farmers harvested 79,000 acres of peanuts, generating over \$75 million in production value. Globally, peanuts are cultivated on more than 30 million acres, much of it in heat-prone regions of Asia and Africa; rising temperatures threaten food security for millions who rely on peanuts for protein, cooking oil, and trade income. Even a 10% reduction in yield could erase \$7-8 million in farmer income in a single season.

A Japanese Peanut That Keeps Its Cool

In a promising breakthrough, researchers at ClemsonUniversityidentifiedapeanutgenotype (qPPVA20) from Japan that stays productive even under prolonged high-temperature exposure. While many peanut lines struggled, producing weak pollen and low pod numbers, the Japanese variety maintained strong pollen health and continued setting pods normally.

This discovery points to a small but powerful genetic region that could help future peanut varieties withstand extreme heat. By using this genetic marker in breeding programs, scientistscanacceleratethedevelopmentof newheat-tolerant peanut lines without waiting decades for traditional cross breeding cycles.

A Climate-Smart Solution with Global Impact

Clemson's discovery gives breeders a roadmap: incorporate the heat-proof traits found in Japanese peanuts into commercial varieties grown in the U.S., India, China, South-East Asia, and Africa. Climate-ready peanuts could protect billions of dollars in annual crop value while keeping global peanut supplies stable.

Backed by support from the USDA and peanut industry boards, this research lays the foundation for a new generation of hardy, heat-resilient peanuts, a timelyinnovationasclimatechallenges intensify.

Source: https://news.clemson.edu/new-genetic-discovery-could-help-peanuts-beat-the-heat



DRONE-BASED WEED MANAGEMENT WITHOUT CHEMICALS

Smart Drones Targeting Weeds With High-Energy Lasers

