PEANUT POST

FEB 2025

102 VOLUME

Is China The Next Game Changer?

MARKET HIGHLIGHTS

SUPPLY

China

Chinese peanut supply remains ample, particularly following a wave of cancelled or failed contracts with Indonesia in January, which pressured export prices across key grades. Indicative levels for 50/60 Baisha declined from around USD 1,450 to USD 1,400, while 7090 grades eased from USD 1,390 to USD 1,350, with distressed trades occasionally seen as low as USD 1,275–1,300. While Indonesian buyers showed a preference for Dongbei origin, Chinese exporters were more active in offering Henan material. Importantly, Henan quality has improved materially compared to the poor conditions seen during early harvest, narrowing the quality gap.

Availability of genuinely high-quality material in these sizes remains limited, and lower-priced supply from China is neither broad-based nor sustainable, reinforcing the premium structure for consistent-quality lots despite overall ample supply.

India

Peanut supply from India is expected to remain extremely tight through February and March, with availability of consistent, good-quality material becoming increasingly difficult. Quality remains a primary constraint, and pricing pressure has now emerged as a second major challenge, creating a dual-stress environment on the Indian supply side. The season opened with TJ 8090 levels around USD 1,100 CIF, which quickly moved through USD 1,250–1,275, stabilized near USD 1,300, and are now being quoted around USD 1,400. Forward indications suggest prices could test USD 1,500 for smaller sizes and USD 1,600 for larger sizes, although actual supply at these levels is expected to be very limited.

Compounding the issue, Indian shippers are increasingly reluctant to offer smaller sizes due to heightened aflatoxin risk, further restricting marketable volumes, even as quality risk remains present across larger kernels as well. As a result, the Indian peanut market is entering a period of pronounced supply stress, characterized by limited availability, rising prices, cautious exporter behaviour, and heightened quality risk—making India a highly constrained and unpredictable origin for the near term.

Africa

African peanut supply remains largely ineffective at present. Sudan continues to be the primary origin, with indicative offers quoted around USD 1,275–1,350, but ongoing conflict in both key growing regions and port corridors has caused severe disruption, making sustainable and reliable supply highly uncertain. While Senegal has formally opened exports—estimated at approximately 450,000 tonnes of peanut kernels—pricing parity remains unattractive, resulting in minimal offtake despite availability. Nigerian peanuts are also being offered into the market; however, persistent quality concerns combined with uncompetitive pricing have limited buyer interest.

Overall, Africa is currently a non-contributor to meaningful global peanut supply, with reliability, quality, and pricing challenges outweighing nominal availability. Market participants are now shifting focus to the upcoming crops in Mozambique and Tanzania, where supply prospects and price competitiveness will become clearer in March–April. Until then, Africa remains largely side-lined as a viable origin in the near-term peanut supply equation.

DEMAND

Indonesia

Demand in Indonesia deteriorated sharply in January 2026 after widespread quality failures in incoming Chinese-origin peanuts, including mouldiness, dirty lots, and ungraded material. This led to a surge in defaulted stocks and a collapse in buyer confidence, pushing local prices down steeply from around IDR 38,000/kg to IDR 28,000–29,000/kg. Demand across major cities remains weak and highly volatile, with blanched 25/29 particularly soft and heavy availability of 61/71 grades, while 140/160 sizes are relatively tighter and seeing marginally better demand. Processing factories continue to operate below capacity, adopting hand-to-mouth procurement amid uncertainty over supply consistency and quality reliability.

Supply into Indonesia continues to be dominated by informal inflows (Smuggled peanuts) from India, estimated at nearly 90% of Indian-origin arrivals, driven by recent import disruptions. Indonesian authorities have intensified inspections and are actively targeting smuggled imports due to food safety and revenue concerns, further pressuring market sentiment. Despite higher prices, Indian peanuts remain strongly preferred over Chinese origin due to superior quality consistency, while Chinese offers continue to face resistance. Forward demand is expected to see seasonal support from Hari Raya from February 2026 onward, though recovery remains fragile amid regulatory tightening, inconsistent supply from India, inconsistent quality from China, and Indonesia's recent ban on Brazilian peanuts due to elevated aflatoxin levels.

China

Chinese peanut demand remains extremely subdued, particularly on the oil side, where buying interest is largely capped around USD 1,550–1,600 CFR Qingdao. China has effectively become an underperformer in the global peanut oil market, with very limited offtake observed through January. Most recent buying activity has shifted toward Brazil, where deals in the USD 1,500–1,550 range are reportedly ongoing. Indian peanut oil has priced itself out of the Chinese market after prices jumped from USD 1,600 to USD 1,700, resulting in virtually no fresh deals, despite several outstanding contracts discussed earlier at USD 1,500–1,550 levels. Adding to India's challenges is a significant quality risk this season, with Free Fatty Acid (FFA) levels reportedly in the 3–5% range, posing a major constraint for buyers.

On the kernel side, Chinese import demand is equally weak. Despite Senegal reopening exports (450k tons), Chinese bids for Senegalese oil-crushing grades remain around USD 900 CFR, while seller expectations are closer to USD 1,050–1,100, leaving the market largely stalled. Domestic demand within China is also poor, with oil-crushing plants showing minimal offtake and enforcing increasingly stringent quality specifications—an indication of weak underlying consumption rather than supply constraints. With Chinese New Year approaching, demand levels appear unusually low by historical standards, raising the likelihood of a substantial—and potentially record—carryover stock position before and after the holiday period.

India

Indian peanut demand surged sharply in January, driven by crop failures and delays across southern India. Andhra Pradesh is now widely viewed as a potential crop failure, while Tamil Nadu arrivals are expected only by March, creating a significant supply vacuum. This has forced buyers to rely heavily on Gujarat and Rajasthan stocks at a time when sowing for the upcoming Gujarat and western India season is about to begin, adding fresh demand pressure. Domestic demand is further supported by Hari Raya consumption within India, pushing internal prices up by an estimated 9–12% month-on-month—well above the Minimum Support Price set by the Gujarat government.

Government procurement remains aggressive, with NAFED continuing to buy despite earlier indications of winding down operations; procurement has already reached approximately 1.7 million tonnes (in shell), and storage constraints are becoming visible. Export parity has deteriorated sharply, with Indian offers for Indonesian shipments rising from around USD 1,350 to USD 1,500 for the grade 8090, resulting in virtually no buying interest. Additionally, multiple shipments have failed quality checks either at Indian ports or upon arrival in Indonesia via official channels, and several Indian exporters have reportedly been banned by Indonesia's IQA. Looking ahead, India is expected to maintain very strong domestic demand through February, March, and April with no immediate relief, and the current structural imbalance increasingly suggests that India may need to turn into a net peanut importer over the next one to two years.

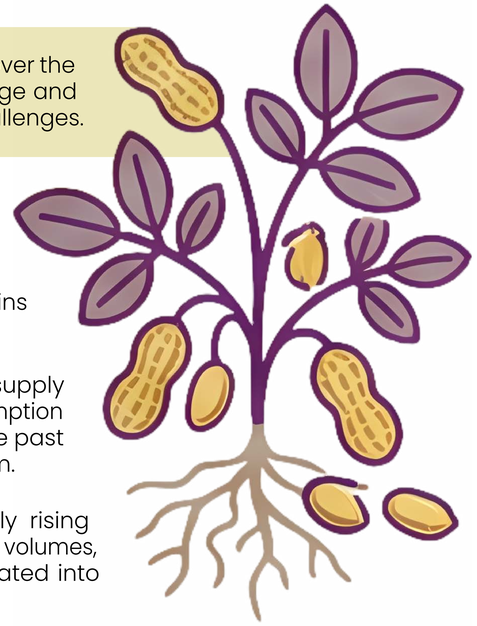
Bird Feed

Demand in the bird feed segment remains limited and largely sideways, with primary requirements concentrated in 60/80 and 80/100 sizes and restricted to specific consumption pockets rather than broad-based buying. While some importers initially showed preference for Indian-origin peanuts, pricing quickly became unworkable, with offers rising from USD 1,050–1,100 to around USD 1,200, effectively curbing further buying interest. In contrast, Argentine bird feed peanuts have remained more competitive, offered largely in the USD 800–900 range and extending up to USD 1,000 depending on quality, making Argentina the preferred origin for price-sensitive buyers. Overall, bird feed demand lacks momentum, with purchasing driven only by selective and necessity-based consumption rather than sustained market pull.

PEANUT WIZARD

Will China's peanut demand rebound after CNY? Will it stay subdued or rise to its true demand potential? A look at supply, demand and consumption dynamics.

China's peanut production has remained broadly stable over the past five years, supported by gradual increases in acreage and yield, even in the face of intermittent weather-related challenges.

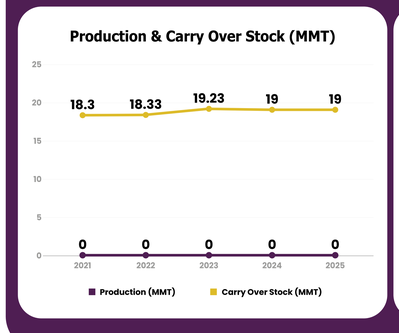


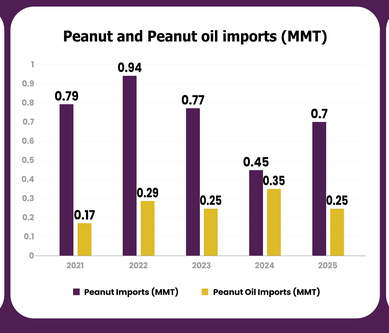
Official data on carry-over (ending) stocks is not publicly available. However, based on production, consumption, and trade dynamics, carry-over stocks are estimated to be below the Indian and global average of approximately 5 percent (5%). For a producer of China's scale, this remains a critical variable to monitor.

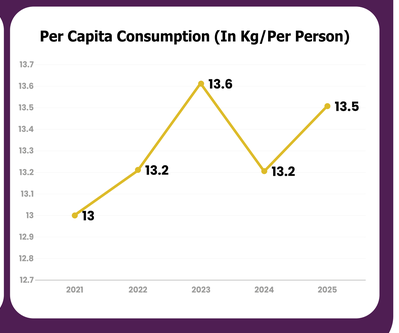
Another key determinant of China's demand–supply balance is per-capita consumption. Peanut consumption per person has remained relatively stable over the past five years at approximately 13.0–13.5 kg per annum.

Taken together, moderately stable to marginally rising acreage and yields have resulted in stable harvested volumes, while steady per-capita consumption has translated into broadly stable year-on-year carry-over stocks.

China's peanut kernel and peanut oil demand are showing divergent trends, indicating that the two are no longer moving in tandem. Going forward, China is expected to maintain a steady pace of food-grade peanut imports, while oil imports will remain opportunistic and driven primarily by price and market conditions rather than consistent demand patterns.







This prompts a key question: why does China still import peanuts?

China produces approximately 19 million tons of peanuts annually. Imports of around 1 million tons (including the Vietnam route) represent barely 5% of total domestic production and are primarily used to bridge short-term arbitrage opportunities, which in turn fuels market speculation rather than addressing any structural supply deficit.

China's peanut industry is highly mature and fully integrated, with thousands of established brands across edible oil, snacks, and value-added food products. This creates a strong and sustained domestic demand base. In addition, there is significant non-consumption demand, particularly for planting seeds and industrial inputs, which forms a fundamental layer of demand beyond food use.

To produce 19 million tons of peanuts on approximately 4.9 million hectares, China requires nearly 0.50 million tons of shelled peanut kernels for sowing alone. This seed requirement is substantial and is comparable to nearly 75% of the reported kernel import volume, underscoring that imports are not driven by consumption shortages, but by price differentials, quality segmentation, and speculative trade dynamics.

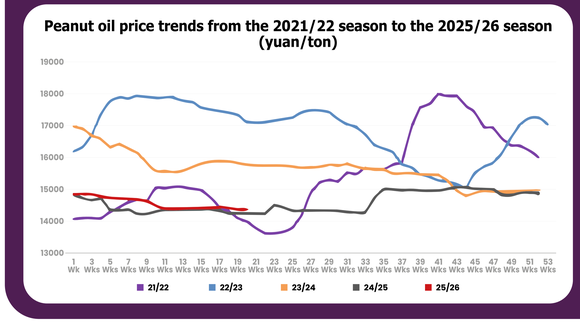
Moreover, the Chinese financial/economic conditions allows efficient hedging / arbitrage / speculative trades.

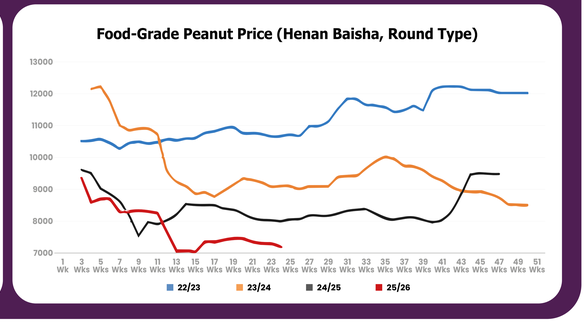
From 2021 to 2025, China's corporate financing costs declined sharply, with loan rates falling from 4.61% in 2021 to around 3.43% in 2024, and further easing to ~3% for SMEs by 2025, driven by monetary easing and LPR reforms.

Inflation remained subdued throughout the period—ranging from 0.9–2.0% in 2021–22, dropping to about 0.2% in 2023–24, and averaging near zero in 2025. This low-inflation environment reflected stable supply conditions and weak demand, enabling policymakers to prioritize growth.

China Outlook

- Chinese trends in peanuts and peanut oil show a mixed outlook, broadly echoing the 2023/24 pattern. Peanut oil prices are likely to remain subdued or soften further, supported by ample inventories and China's openness to sourcing from lower-cost origins such as Senegal and Brazil.
- Kernel prices, however, appear more mixed with a downward bias in the near term, but this could reverse from mid-March onward. Limited active procurement for food use—particularly from Sudan, Argentina, and the U.S., coupled with China's reduced preference for Indian origin due to quality issues and large cargo rejections in December–January—is expected to tighten availability. This may place significant pressure on China's food-ingredient manufacturers, with kernel prices potentially correcting upward by USD 50–200 per ton.
- Ultimately, market direction will depend on which sentiment—oil or kernels—asserts itself. As always, China's scale and resilience mean its demand decisions continue to exert a decisive influence on global markets.

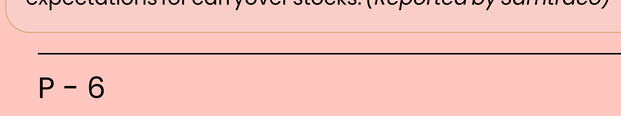




Global Markets

ARGENTINA

Argentina's 2026 peanut crop faces serious risk due to persistent drought across central-south, southern, and southwestern growing regions. Conditions are critical in key areas such as southern Córdoba, northern La Pampa, and southwestern San Luis, with drought stress now affecting nearly the entire central peanut belt. Short- and medium-cycle varieties have already passed more than half their growing period without proper vegetative development, leading to irreversible yield losses. Many producers now hope for rainfall to secure at least minimal output. Only limited zones in northern and northeastern Córdoba, plus a few scattered areas, received localized rains and show good crop conditions. Without sustained rainfall in the coming months, crop growth will stall, reproductive stages will halt, and production potential will continue to decline. *(Reported by Georgalos Peanut World)*



BRAZIL

Brazil's peanut crop is progressing well, and growers are now entering the so-called "second half" of the season, when weather becomes the key factor for final yields. Despite a reduction in planted area, sentiment among producers and exporters remains positive, with strong expectations for productivity. Agronomist Jair Heuert, a leading peanut researcher, views the smaller area as a strategic adjustment rather than a setback. In recent years, high international prices encouraged many farmers to expand beyond their operational capacity. By returning to a more manageable scale, growers can plant at the ideal time, apply fungicides more precisely, and harvest at proper maturity. This improves efficiency, grain quality, and reduces losses, while also allowing tighter financial control and greater investment in technology, genetics, and input optimization. As a result, national average yields could finally surpass 4 tons per hectare even with fewer hectares planted. Export performance has been exceptional. December kernel exports hit a record 40,000 tons, pushing year-to-date shipments to 311,000 tons. Peanut oil exports also reached an all-time high of 154,000 tons in 2025, reshaping earlier expectations for carryover stocks. *(Reported by Samtraco)*

USA

Market participants are starting to focus on 2026/27 planting intentions. Lower peanut prices in the U.S. could encourage some reduction in acreage next season. However, competing row crops are currently not very attractive to growers, which may help limit any significant shift away from peanuts. Early private estimates point to only a slight decline in planted area compared with 2025/26, though considerable uncertainty still surrounds final decisions. In addition, the USDA farm program is seen as relatively supportive for peanuts, which could further restrict a major drop in acreage. *(Reported by Georgalos Peanut World)*

PEANUT SPOTLIGHT

INDIA

The Gujarat groundnut market remains firm with a clear upward trend. Java stocks are nearly exhausted, while Pathwada arrivals have tapered to just 200–300 bags daily. In the Bold segment, roughly 30% of stocks remain, mostly with farmers. NAFED's procurement of about 18 lakh tons has sharply reduced open-market availability and eased selling pressure. At current price levels, exporters are largely inactive, but strong domestic demand—especially from seed buyers—continues to support the market. With summer sowing beginning in February, seed demand is expected to stay firm. Overall sentiment remains firm to bullish, as stockists have largely exited and nearly 70% of factories are closed due to price disparities.

In South India, the season shows mixed crop performance. Tamil Nadu has seen reduced sowing, with output in some belts down nearly 50%, while other areas remain stable. Andhra Pradesh and Telangana report satisfactory sowing, though high prices are directing arrivals mainly to domestic markets. Karnataka faces weaker crop prospects and delayed arrivals. Across the region, tight supply, high prices, and strong domestic absorption are expected to keep the market firm.

INDONESIA

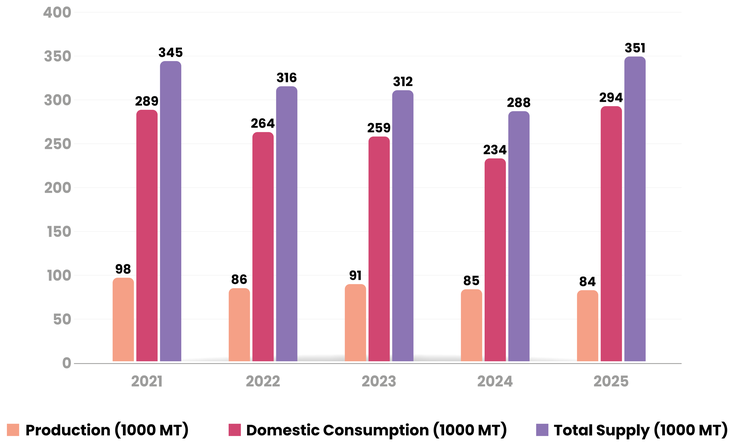
Indonesia's peanut market is experiencing softer-than-expected demand, as a wave of China-origin arrivals has increased near-term supply and pushed prices down—even before previously imported, higher-priced cargoes were fully cleared. While there is supportive news from the Indian market, it has yet to influence local trading because most buyers are already holding sufficient stocks. With additional China shipments due in the coming weeks, supply-side pressure is likely to persist. Buying interest for lower-grade China peanuts remains limited unless stronger market sentiment or fresh bullish factors emerge. Within Indonesia, China-origin 50/60 grade peanuts are currently quoted at around USD 1,830 per ton for good-quality Henan cargo. In the 140/160 grade, China ordinary quality is trading at approximately USD 1,730–1,770 per ton. India OBE is offered near USD 1,870 per ton, but China OBE continues to dominate this segment, with some market offers reported as low as USD 1,630 per ton.

CHINA

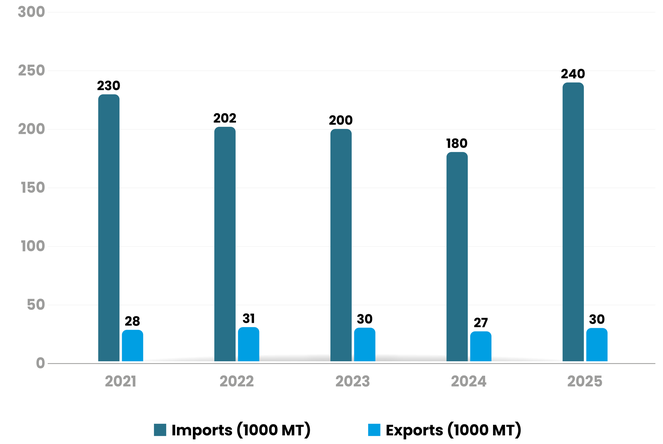
Domestic peanut prices have remained largely stable, but trading activity is still sluggish. During the Spring Festival period, consumption fell short of expectations, with weak sales in major wholesale markets and food processing factories leading to softer demand. As a result, market confidence is low and participants are cautious about building inventories. At the same time, suppliers are firm on prices and reluctant to sell, especially holders of high-quality peanuts who prefer to wait for better opportunities. With limited trading days left before the holiday, middlemen face difficulties in both buying and selling, and some processing plants have already paused procurement to observe the market. Overall, limited transaction volume is restricting any significant price increases, while firm supplier sentiment is also preventing sharp declines. In the short term, prices are expected to fluctuate slightly within a stable range. After the holiday, restocking demand may offer support, but rising temperatures in March could accelerate sales of lower-quality peanuts and weigh on the market.

MEXICO DEMAND & SUPPLY

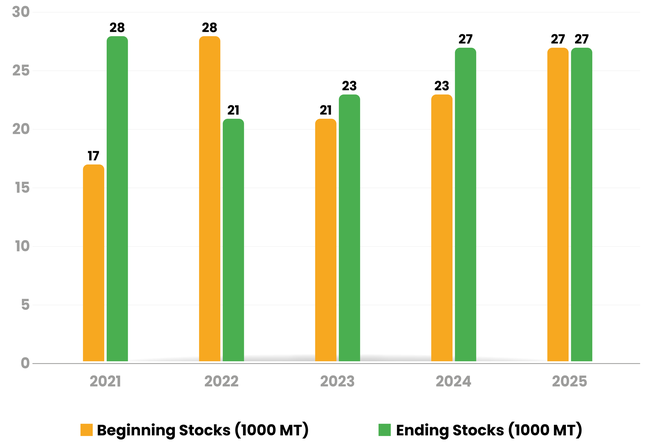
Mexico Production, Domestic Consumption & Total Supply (In 1000 MT)

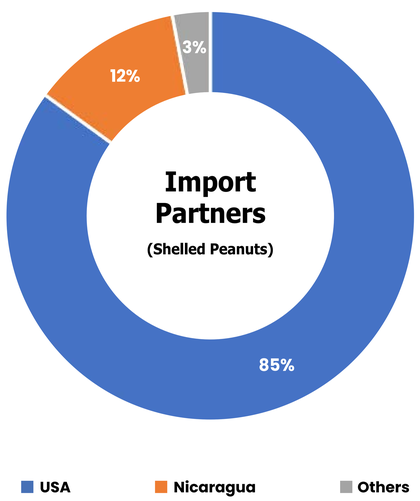


Mexico Imports & Exports (In 1000 MT)

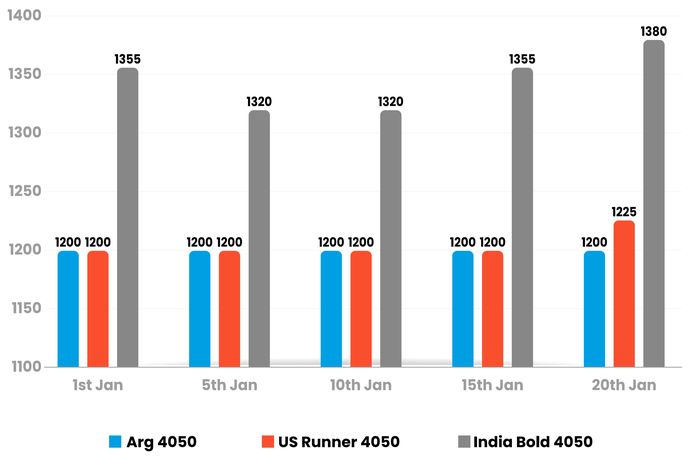


Mexico Stock Variations (In 1000 tons)

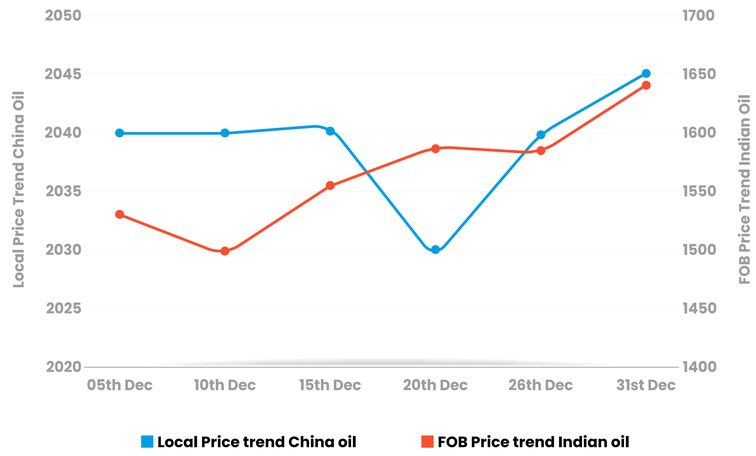




CIF EMP (European Main Port) PRICE COMPARISON in USD



Peanut oil price trends: China Local Vs FOB India in USD



Current Crops

ARG 4050 - $1200

ARG

Argentina

Argentina's 2026 peanut crop is in critical condition due to severe drought losses.

Brazil

BRA

BRA 4050 - $1150

Brazil's crop is progressing well, with yields expected above 4 t/ha.

CHI 41/51 - $1700

CHI

China

In Henan and Shandong, good-quality peanuts are scarce, with most affected by discoloration, poor taste, sprouting, or mold.

India

IND

IND 4050 - $1510

G20 groundnut lots show aflatoxin issues, limiting EU market access.

RSA - $NA

RSA

South Africa

USA

USA

USA 4050 -$1225

U.S. harvested peanut area recorded a 9.4% increase from last year.

INDO - $NA

INDO

Indonesia

PEANUT VOICE

"I am Liu Huijie, Deputy Secretary-General of the Peanut Professional Committee of the China Green Food Association, and Head of the International Business Department at COFCO Sundry Peanut (Weihai) Co., Ltd., with 12 years of experience in the peanut industry."

Liu Huijie

COFCO Sundry Peanut (Weihai) Co., Ltd.

What is the biggest upside risk and biggest downside risk for China's peanut market over the next 12 months?

Over the next 12 months, China's peanut market faces upside risks from reduced planting areas, extreme weather, higher import costs and seasonal demand, while downside risks stem from high inventories, shipment pressure, low-priced substitutes and subdued consumer confidence.

The Nitrogen Dividend

By leaving 45–150 kg of nitrogen per hectare in the soil post-harvest, peanuts act as a free "natural nitrogen deposit." This process slashes considerable amount of fertilizer costs for the following crop, effectively working as an automatic cash rebate for farmers.

QUALITY SCIENCE

In-Line Moisture Sensing: Controlling Hidden Moisture Risks in Peanut Processing Lines

In peanut quality science, moisture is the most underestimated risk factor, yet it is the single strongest driver of aflatoxin contamination after harvest. Peanuts are often dried to safe average levels, but during handling and storage, cross-mixing of high-moisture kernels can occur within bulk lots, bags, or silos. Even a small pocket of wet peanuts is enough to trigger fungal growth and toxin production, silently compromising an entire batch.

Aflatoxin contamination is not a small problem. Globally, aflatoxins are estimated to cause billions of dollars in losses every year through rejected consignments, downgraded quality, and health-related trade barriers. In export markets, a single failure can mean 100% rejection, disposal costs, and long-term reputational damage. The irony is that aflatoxin is often detected only at the final testing stage, when corrective action is no longer possible.

This is where in-line moisture sensing becomes a powerful preventive tool. Unlike handheld meters or spot checks, an in-line moisture sensor installed on a peanut processing line continuously monitors moisture as peanuts move through cleaning, grading, or conveying systems. Instead of relying on batch averages, processors gain real-time visibility of moisture variability inside the bulk.

When a moisture spike is detected, indicating cross-mixed or insufficiently dried peanuts, the system can trigger immediate actions: diverting material for re-drying, rejection, or segregating high-risk lots. This transforms aflatoxin control from a reactive testing approach into a process-based preventive control, aligned with HACCP and modern quality systems.

Scientifically, this approach makes sense. Fungal growth accelerates sharply above kernel moisture levels of ~8–9%, especially under warm conditions. By maintaining tight moisture control throughout processing, the window for fungal germination and toxin formation is dramatically reduced.

In simple terms, you cannot control aflatoxin if you do not control moisture dynamically. In-line moisture sensing offers a practical, scalable, and cost-effective way to protect peanut quality turning moisture from a hidden risk into a measurable, manageable parameter.

Upcoming Events

BIOFACH

10 - 13 February 2026

Nuremberg, Germany

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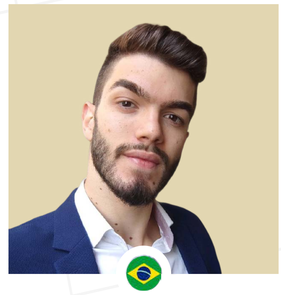

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SUSTAINABILITY

DO CONSUMERS CARE?

THE RISE OF SUSTAINABILITY LABELS IN THE PEANUT INDUSTRY

As consumers become more conscious of where their food comes from and how it is produced, sustainability labels are increasingly influencing purchasing decisions. What was once a quiet, everyday purchase is now being questioned: *Was this grown responsibly? Who grew it? At what cost to the environment?* Sustainability labels are turning even everyday peanuts into products under ethical review.

Why Sustainability Matters in Peanuts

Peanuts already offer natural sustainability advantages. As a legume, the peanut plant improves soil health by fixing nitrogen, thereby reducing dependence on chemical fertilizers. However, these benefits often remain invisible to consumers unless they are clearly communicated through labels and certifications.

THIS GAP HAS FUELED THE RISE OF SUSTAINABILITY LABELS SUCH AS:

GLOBALG.A.P. · FAIRTRADE INTERNATIONAL · RAINFOREST ALLIANCE CERTIFIED · Certified B Corporation · NON GMO Project VERIFIED · CLIMATE NEUTRAL CERTIFIED · FSC FSC® C016391

A Brief Look at Europe's Influence

While sustainability is a global trend, European markets play a visible role in setting standards. European retailers and importers increasingly expect clear sustainability documentation for peanuts, particularly related to pesticide use and supply-chain traceability. European consumers are also among the most label-aware, reinforcing the importance of clear and credible certification — even for everyday products like peanuts.

EUROPEAN CONSUMERS ARE AMONG THE MOST SUSTAINABILITY-CONSCIOUS GLOBALLY:

- Over **65% of European consumers** say sustainability influences their food purchasing decisions
- Nearly **one in two shoppers in Western Europe** actively looks for environmental or ethical labels on food packaging

Do Peanut Buyers Really Act on Labels?

Yes — but with conditions. Research shows that consumers:

- Associate sustainability labels with better quality and improved food safety
- Are willing to pay a moderate premium (around 5–10%) for sustainably produced peanuts
- Expect transparency and credibility, not vague or unverified "green" claims

What This Means for the Peanut Industry

Sustainability labels are no longer niche or optional. They are becoming essential tools for market differentiation, risk management, and building consumer trust. The most effective labels are those supported by genuine practices and communicated in a clear, transparent manner.

Ultimately, consumers do care — not blindly, but thoughtfully. For the peanut industry, sustainability labels work best when they inform and reassure consumers while aligning ethical farming with everyday affordability.

BIRD FEED

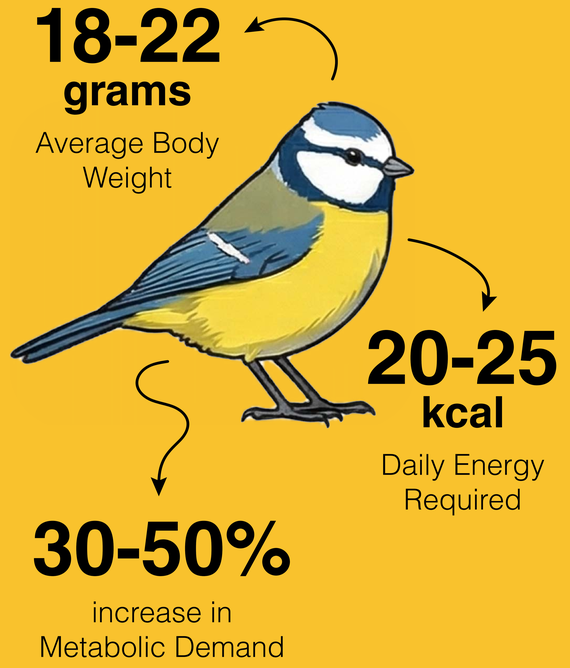
How Much Can Peanuts Fulfil a Bird's Daily Nutritional Requirements?

Peanuts are widely recognized as one of the most energy-dense foods available for birds. Their high fat and protein content makes them especially attractive to many garden species. *But how much peanut intake is actually sufficient to meet a bird's daily nutritional needs?*

To better understand their contribution, let us take the Blue Tit / Great Tit as a reference species. These small, active garden birds are well studied, readily consume peanuts, and have high daily energy demands, making them an ideal nutritional benchmark.

Daily Energy Requirement

A typical Blue Tit or Great Tit weighs approximately 18–22 grams and requires around 20–25 kilocalories (kcal) per day to sustain basic metabolism, flight activity, and body temperature. During colder months, breeding, or molting periods, this energy requirement can increase by 30–50% due to higher metabolic demands.



Nutritional Density of Peanuts

Raw, unsalted peanuts provide exceptional nutritional value:

- Energy: **~567 kcal/100g**
- Protein: **~25–26%**
- Fats: **~48–50%** **(primarily unsaturated fats)**
- Key micronutrients: **Vitamin B3 (niacin), Vitamin E, magnesium, and phosphorus**

1 gram
Average Kernel Weight

5.5-6 kcal
Energy Per Kernel

On average, one peanut kernel weighs about 1 gram, supplying approximately 5.5–6 kcal.

Energy Contribution in Practical Terms

With a daily energy requirement of around 20–25 kcal, even small quantities of peanuts can make a significant nutritional contribution:

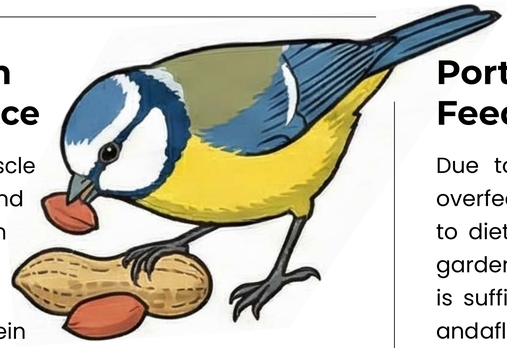
1 peanut → ~6 kcal
≈25-30%
of daily energy needs

2 peanuts → ~12 kcal
≈50-60%
of daily energy needs

3 peanuts → ~18 kcal
≈70-75%
of daily energy needs

This clearly illustrates why peanuts are especially valuable during periods of food scarcity, such as winter, when natural insect populations are low.

Protein Contribution and Body Maintenance



Protein plays a crucial role in muscle maintenance, feather quality, and chick development. With a protein content of approximately 25%, peanuts can contribute up to 35–40% of a small bird's daily protein requirement when consumed in moderate amounts. This makes them particularly beneficial during breeding, molting, and recovery from environmental stress.

Why Peanuts Cannot Be a Complete Diet

Despite their impressive energy and protein content, peanuts are not nutritionally complete. Birds also require:

- Calcium, essential for bone strength and egg formation
- Specific amino acids not sufficiently present in peanuts
- A broader range of vitamins and trace minerals

For this reason, peanuts should be offered as a supplementary food, ideally alongside seeds, grains, insects, fruits, or balanced commercial bird feed.

Ca Calcium
Amino Acid
Vitamin & Mineral

Portion Control and Feeding Safety

Due to their high fat content, overfeeding peanuts may lead to dietary imbalance. For small garden birds, 1–2 peanuts per day is sufficient. Only raw, unsalted, and aflatoxin-safe peanuts should be used, as mold-contaminated peanuts can be harmful.

1-2 peanuts/day

Conclusion

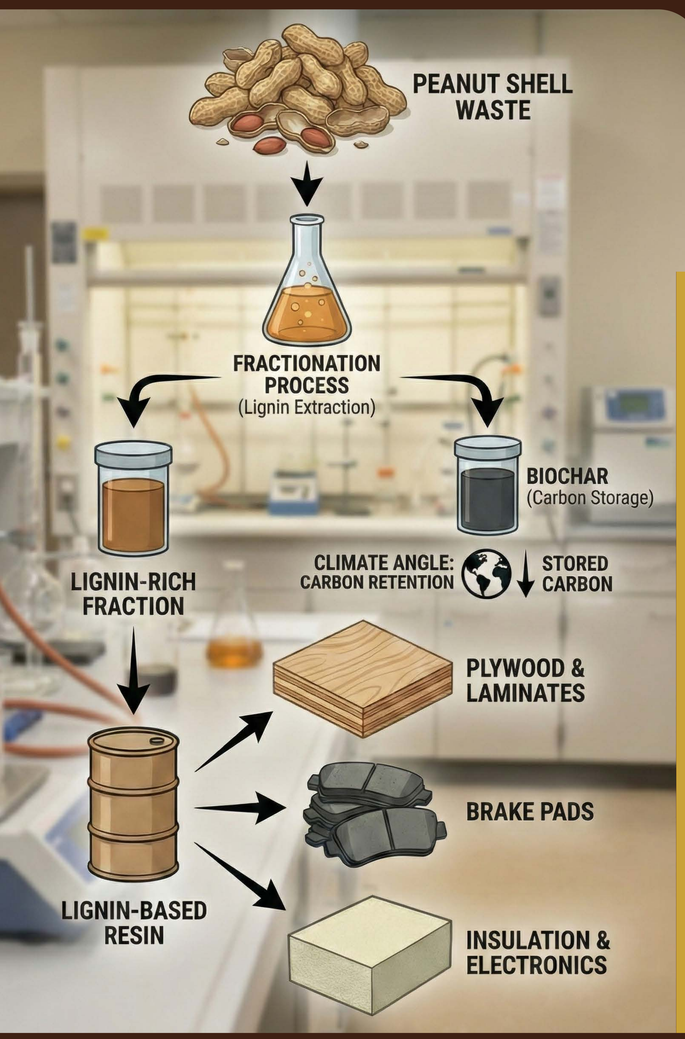
Small garden birds need only about 20–25 kcal a day, and just 1–2 peanuts can provide up to half of that energy. This makes peanuts an efficient and valuable supplement when fed responsibly as part of a balanced diet.

Peanut Science

Phenolic Resins: The Untapped Power of Peanut Husk Biomass

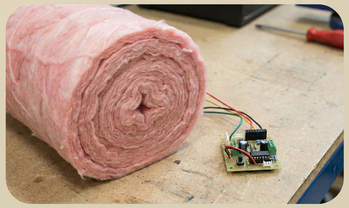
PEANUT SHELLS look like farm waste,

but they're actually a ready-made "green chemical" resource.



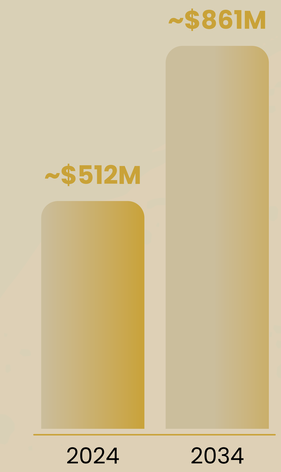
Globally, peanut production is about 52 million tonnes (2025 estimate), and shells are roughly 20–29% of pod weight, which translates into a massive residue stream. One peer-reviewed assessment estimates ~11 million metric tonnes of groundnut shell waste generated every year from the groundnut industry, much of which is burned, buried, or dumped when there's no profitable use.

The science behind the opportunity is simple: peanut shells are lignocellulosic biomass, containing cellulose, hemicellulose, and lignin. Lignin is especially valuable because it's rich in aromatic structures the same kind of chemistry used to make industrial resins. With sustainable fractionation (for example, mild alkaline or solvent-recovery "organosolv" routes), shells can be processed into a lignin-rich fraction that can partially replace petroleum phenol in phenolic resins and serve as a building block for other bio-based binders.



The market pull is real. Phenolic resins, used in plywood/laminates, insulation, brake pads, and electronics, are forecast to grow at about ~4–5% CAGR through 2030. And the niche specifically aligned to shell lignin is expanding: lignin-based resins are projected to rise from ~$512M (2024) to ~$861M (2034) at ~5.3% CAGR, driven by demand for lower-emission, more sustainable adhesives and composites.

The climate angle is compelling too. When shells are upgraded into long-life resins, panels, or composites, a portion of their carbon becomes stored in durable products instead of returning quickly to the atmosphere through burning. Pairing resin extraction with biochar from the remaining solids can further increase carbon retention, turning a disposal problem into an economic and carbon-smart materials strategy.



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