PEANUT POST

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104 VOLUME

The New Peanut Axis

MARKET HIGHLIGHTS

SUPPLY

BRAZIL

Brazil has begun harvesting its new peanut crop, with early indications showing satisfactory yields, although overall acreage is lower compared to last season. Prices have not yet been formally offered, but initial expectations for Runner kernels are in the range of USD 1,100–1,300 per ton. Despite the reduction in acreage, a significant price increase is unlikely, as market conditions remain weighed down by subdued demand driven by ongoing geopolitical tensions, inflationary pressures, and currency movements. The weakening Brazilian Real is expected to further support competitive export pricing. Peanut oil is currently offered between USD 1,550 and 1,580 per ton. Demand from China remains steady without notable growth, and overall, the market is expected to remain stable, with current old crop price levels likely to carry through into the new crop.

ARGENTINA

Argentina has begun harvesting its peanut crop, with peak harvesting activity expected through April and May. Shipments are gradually being committed, but price indications from shippers remain quite wide. For 38/42 raw kernels are being offered in the range of USD 1,400 to 1,600 per ton FOB, reflecting a broad spread largely driven by very low carry-forward stocks in this grade. In contrast, there is sufficient carry-forward availability in 50/60 and some in 40/50, along with significant volumes of crushing and bird feed peanuts remaining from the 2025 crop. For the 2026 crop, bird feed peanuts are being offered between USD 900 and 950 per ton, with trades reported around USD 800 to 850, indicating a wide demand-supply gap. Freight rates have increased sharply due to the ongoing war situation, with certain shipping routes becoming unavailable. Peanut oil is being offered around USD 1,600 per ton, although availability remains limited due to low activity during the crop transition period. Overall, similar to Brazil, Argentina is expected to carry forward price levels from the previous crop initially, but could face downward pressure once Brazil begins offering at more competitive levels, while freight and currency movements may continue to drive price volatility.

INDIA

The Indian peanut market remains largely quiet and stable. Prices had briefly increased on speculation around potential Indonesian import quotas, but have since stabilized following the completion of shipments, mainly due to low liquidity in the open market. While the government continues to hold nearly 2 million tons of stock, tender approvals are occurring at relatively high price levels, making it difficult for these supplies to compete in price-sensitive export markets such as Indonesia and the Philippines. As a result, demand from key destinations including the Philippines, Thailand, Vietnam, and Indonesia remains firm but underserved. The next major crop from Gujarat is only expected from June, while current availability from South India is just sufficient for domestic consumption. Java 50/60 in South India is trading at around USD 1,900–2,100 per ton, which is significantly high and limits export competitiveness. Overall, despite substantial government stocks, the Indian market remains tight, with stable to strong pricing supported by limited effective supply.

CHINA

China's peanut supply for export remains tight, particularly for raw kernels destined for Indonesia. Prices for 70/90, 80/100 grades are being offered in the range of USD 1,350–1,425 per ton FOB, depending on origin and quality specifications. For Baisha 50/60, offers are between USD 1,450 and 1,575, with variations based on Hainan or Dongbei origin and quality, as off-peak season material increasingly shows mixing with smaller kernels despite meeting count specifications. Overall supply is extremely limited, with very few offers at lower price levels, leading to low market liquidity. This is further compounded by currency fluctuations, container shortages, and elevated freight rates, all of which are supporting an upward bias in prices. Blanched kernels (25/29) are currently reported between USD 1,300 and 1,350 FOB, with a noticeable increase of USD 30–40 per ton observed during March due to supply constraints. The Chinese market is clearly facing a liquidity crunch on the supply side, with suppliers increasingly unwilling to commit volumes at lower price levels.

DEMAND

CHINA

Demand from China remains stable overall, with crushing-grade peanuts, primarily from Latin American origin, priced around USD 750 per ton. Peanut oil transactions have been concluded in the range of USD 1,550–1,600 CFR Qingdao, although deals above USD 1,600 are limited despite the need for restocking by local oil companies. Market liquidity remains tight, and purchasing power is currently constrained. However, there is potential for a rebound in demand, particularly for oil and crushing grades, if buying interest strengthens in the near term.

INDONESIA

Demand from Indonesia remained strong for March shipments, largely driven by market speculation that the government may introduce an import quota system for peanuts, similar to what has been implemented for chilies. While there has been no official confirmation and the news continues to remain speculative, the possibility of such a move being enforced with immediate effect and a short transition window of around 30 days has kept import demand elevated. As a result, the Indonesian market has stayed active, with buyers continuing to secure volumes in anticipation of potential regulatory changes.

VIETNAM

Demand from Vietnam has remained subdued, primarily due to the anticipated implementation of new quarantine procedures and food safety regulations from April. While there is still limited clarity on the exact requirements, importers are currently cautious, leading to reduced import activity. At the same time, domestic demand remains firm amid relatively lower stock levels in the local market, but uncertainty around regulatory changes is keeping buyers on the sidelines for new import commitments.

PEANUT WIZARD

How Brazil is reshaping global peanut supply chain of peanuts.

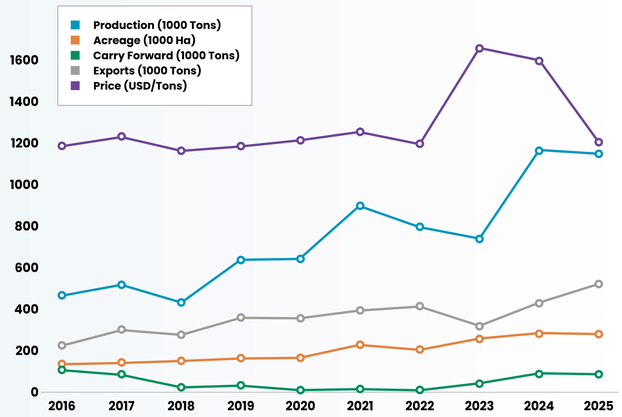
If Argentina is the Tesla of the peanut industry, is Brazil emerging as the BYD of LATAM—reshaping global peanut supply chain dynamics?

Despite being a relatively new entrant with just over a decade in the industry, Brazil has delivered remarkable growth, with peanut production increasing by nearly 300%. What are the key drivers that hxave enabled Brazil to achieve and sustain this expansion?

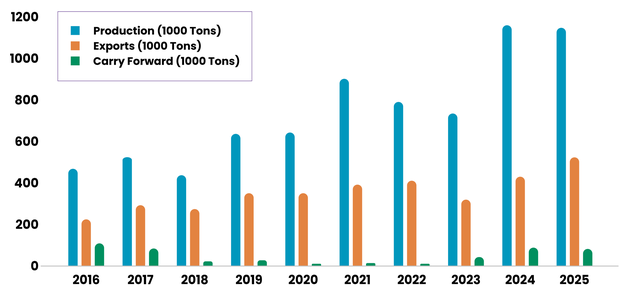
Brazil is strategically positioned to emerge as a powerhouse in the LATAM peanut industry. Key advantages include:

- Crop rotation with a large-scale crop such as sugarcane, ensuring strong structural support
- A consistently weaker currency, supporting export competitiveness (nearly 100% depreciation over the past decade)
- Industrial-scale, agro-tech-driven farming comparable to the US, enabling strong adaptability and consistent yields

Brazil Peanut Market Trend (Last 10 Years)



Brazil Peanut Production, Exports, and Carry-Forward Stocks



Analysis:

147% growth in peanut production over the past decade

Stable pricing, maintaining competitiveness with Asian origins

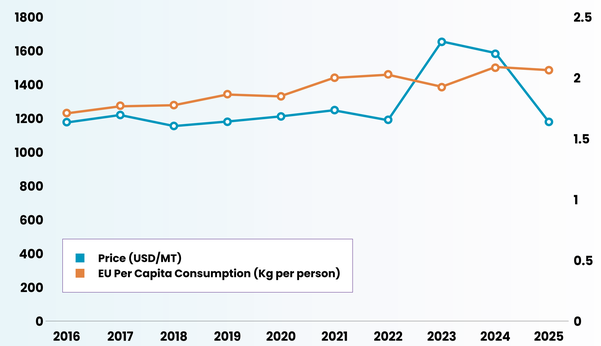
A powerful combination of expanding acreage, rising yields, and consistently low carry-over stocks

Analysis:

Brazil exports nearly 45% of its production and has demonstrated strong consistency in maintaining low carry-over stocks, with close to 50% of periods reflecting minimal or no inventory. This indicates robust underlying consumption support.

However, this dynamic may become less elastic as Brazil potentially doubles its production over the next five years.

Pricing vs European Consumption Trends

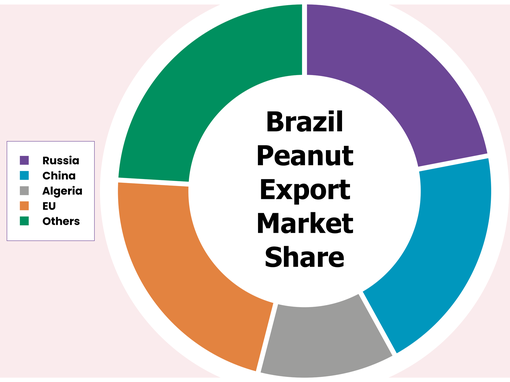


For Europe, Brazil represents a strategic sweet spot—albeit with some caution—and serves as a strong lever in negotiations with Argentina. With Brazil firmly positioned, India's competitiveness in the EU market becomes significantly limited, while China's participation is likely to depend primarily on specific varietal qualities.

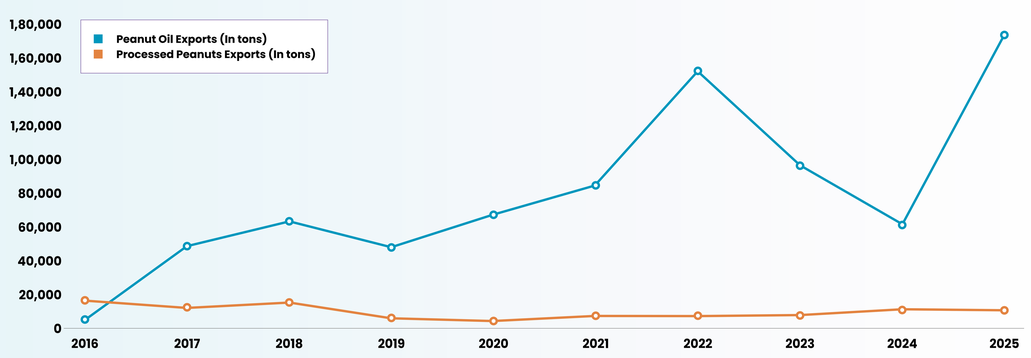
This dynamic reflects an emerging reality that could increasingly become the guiding principle in the years ahead.

Brazil's strong performance is further reinforced by the strength of its client base. Its customer mix is exceptionally well-balanced compared to other origins, combining both bulk buyers for oil and large-kernel food processors.

This diversified and evenly distributed demand across client segments provides stability and resilience to Brazil's peanut industry.



Export performance of Peanut Oil Vs Processed Peanuts



Among the key data points and analysis of Brazil's peanut industry, this remains the primary area of concern. A growing reliance on peanut oil production and exports could, over time, constrain the development of food-grade peanut supply for Brazilian farmers.

To mitigate this, Brazil must either scale overall peanut production at an industrial level or increasingly focus on varietal development that clearly differentiates between food-grade and oil-grade segments.

Global Markets

ARGENTINA

Argentina is currently in a weather-driven market situation. Due to the drought experienced in January, exceptional yields like those seen in the 2024 and 2025 crops are not expected this season. However, recent weeks of rainfall have significantly improved soil moisture levels. Market attention is now shifting toward temperature trends, particularly minimum temperatures, which will be critical for crop development. The improved soil moisture has supported a broad recovery in crop conditions, leading to healthier cultivars and a more optimistic overall outlook despite earlier weather challenges. *(Reported by Georgalos Peanut World)*

INDIA

Gujarat market remains firm, supported by limited availability of stocks held by NAFED and major stockists. It is estimated that stockists are holding around 15 lakh bags of in-shell groundnut, and they are currently not inclined to sell, as much of this stock is reserved for sowing purposes. NAFED stocks are also affected by quality issues such as water damage, reducing their participation in tenders at higher price levels. Domestic demand, particularly from Maharashtra, is steady. Suppliers are actively trading in the domestic market at higher moisture levels, maintaining price parity. Overall market sentiment is positive due to strong domestic demand, good demand for sowing-quality lots, and the closure of several processing factories, which is supporting prices. In the oil segment, prices are rising due to reduced imports of palm and soybean oil, influenced by global uncertainties. Crushing activity is also slow, further tightening supply. Blanching units are operating at reduced capacity due to high gas costs. Summer crop arrivals are expected from May–June, with good sowing in Saurashtra, average in Kutch, and steady demand from South India markets like Tamil Nadu.

USA

For Crop 2026, current price levels may lead to reduced peanut planting, with the upcoming Farm Bill likely influencing farmers' decisions. Chinese demand trends could shift buyers toward alternative South American origins, especially if logistical disruptions persist in traditional supply routes. For Crop 2025, availability remains good for mid-range and lower-quality peanuts. However, quality concerns are increasing, raising doubts about how much of the crop will meet edible-grade standards. *(Reported by Georgalos Peanut World)*

PEANUT SPOTLIGHT

BRAZIL

Brazil has harvested around 40% of its peanut crop so far, with generally good quality, particularly regarding aflatoxin levels. High approval rates have been reported from field samples, as highlighted during last week's World Peanut Meeting in Mendoza. The final outcome of the crop will become clearer by late April, when most harvesting is completed. Current progress has faced minor rain interruptions, but nothing significantly concerning. According to José Rossato during the supply panel, the planted area is estimated at 270,000 hectares, reflecting a 29% decrease, with an expected yield of 4.1 mt/ha. In February, kernel exports declined again, reaching about 18,000 tonnes—down 26% from January, though still 37% higher year-on-year. Total exports for the current crop (April 2025 to date) stand at approximately 303,000 tonnes. Reduced imports from major destinations indicate that carryover stocks are nearing depletion. Peanut oil exports rose slightly to around 8,000 tonnes, supported by continued demand from China. However, it remains uncertain whether this demand will persist, especially as Chinese imports have declined again, while Italy showed a slight increase. *(Reported by Samtraco)*

OTHER'S

Indonesia Market resumed post-holidays, but demand is still slow. Major importers hold stocks and await better demand. Smaller buyers are using pre-holiday inventory; fresh buying expected once stocks finish. Cargo from India and China is on the way. 140/160: China ~USD 1530/MT; India OBE ~USD 1700–1760/MT.

South Africa South Africa's 2026 peanut crop is now estimated at 69,360 tons, up from 65,238 tons in February. Favorable growing conditions and good rainfall have supported better yields, larger sizes, and improved quality compared to 2025. While a small western area faced drier conditions, overall impact is limited. With drier weather expected during the upcoming harvest, conditions look ideal, and a strong season is anticipated.

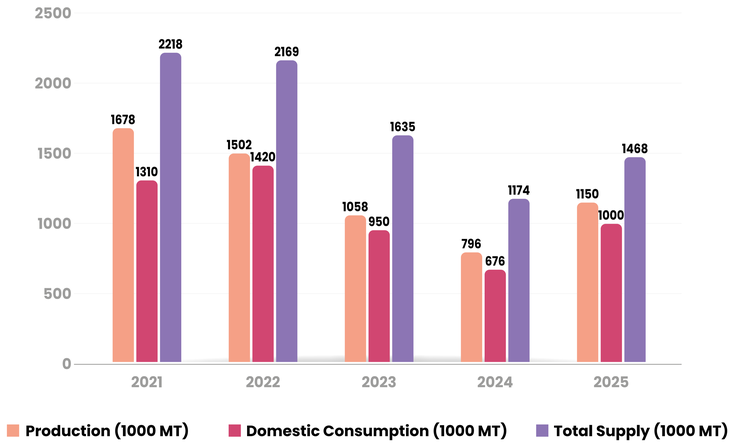
Tanzania The new crop season in Tanzania has begun, though some moisture-related challenges persist. Harvesting is still affected by rainfall in certain areas, but quality is expected to improve depending on weather conditions. Farm-level prices for 6070 grades are currently between $900–$970/MT. The market outlook remains positive, with better export opportunities expected after April 25, once crop quality and conditions stabilize.

CHINA

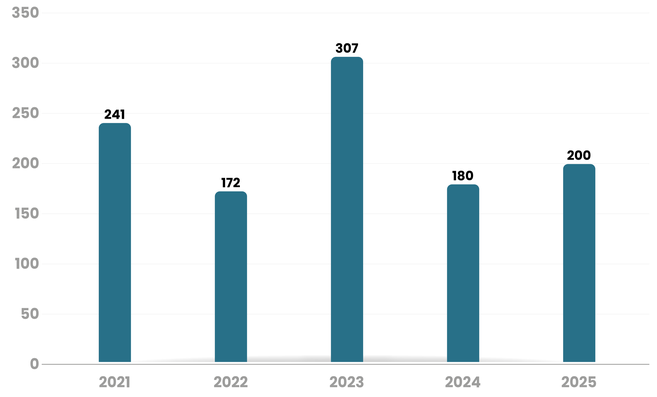
The domestic peanut market is stabilizing, with mixed trends across regions. In the Northeast, prices are slightly weakening due to lower-quality peanuts, while high-quality supplies remain firm as sellers resist price cuts. In Henan, strong demand from oil mills supports prices, though further increases face resistance. Limited grassroots supply and clear quality advantages in some areas are making procurement increasingly difficult. Supply and demand remain balanced, keeping prices relatively stable amid ongoing buyer-seller negotiations. Northeast prices are easing, but quality peanuts are scarce and tightly held. In Henan, reduced availability and steady oil mill demand continue to support the market. Meanwhile, lower imports have reduced external pressure. In the medium to long term, demand and consumption trends will be key. Northeast peanuts may gain advantage as temperatures rise, while Henan peanuts, though cheaper, face storage limitations. The current FOB price for Chinese blanched 4151 is around $1380/mt. Overall, prices are expected to remain stable in the short term.

SENEGAL DEMAND & SUPPLY

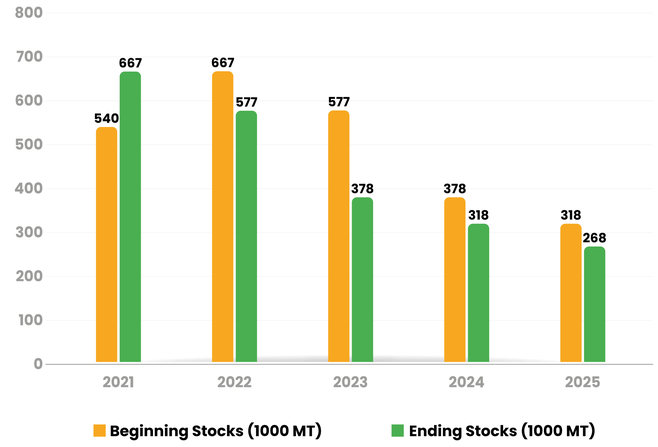
Senegal Production, Domestic Consumption & Total Supply (In 1000 MT)

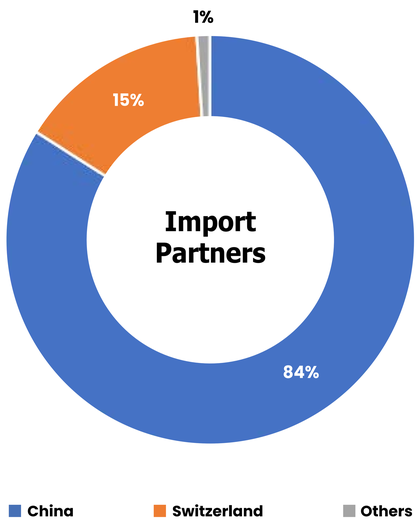


Senegal Exports (In 1000 MT)

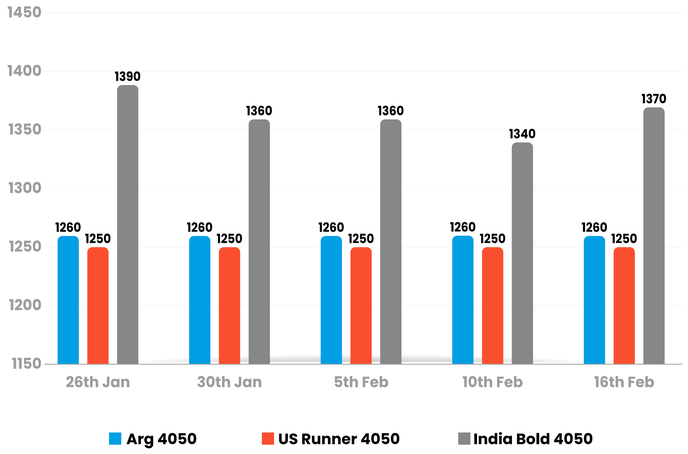


Senegal Stock Variations (In 1000 tons)

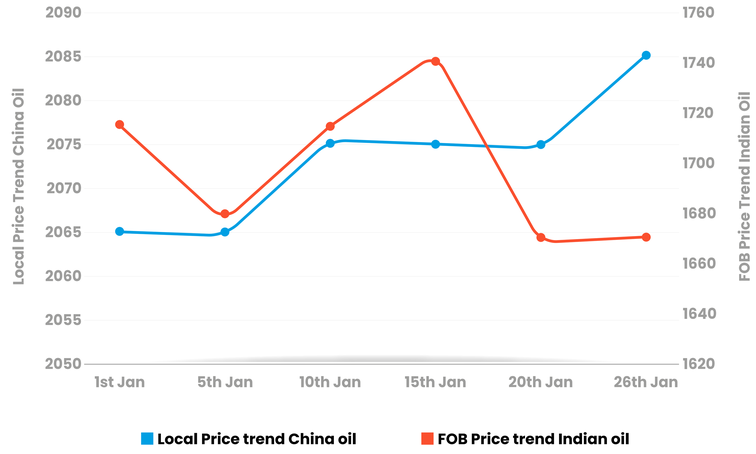




CIF EMP (European Main Port) PRICE COMPARISON in USD



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



Current Crops

ARG 4050 - $1260

ARG

Argentina

Recent precipitation has led to a strong recovery in soil moisture conditions.

Brazil

About 45% of the Brazilian crop has been harvested so far.

BRA

BRA 4050 - $1200

CHI 41/51 - $1680

CHI

China

India

The southern crop is 50–60% harvested, with moisture levels at a concerning 10–12%.

IND 4050 - $1425

IND

RSA - $NA

RSA

South Africa

The growing season has been favorable, supported by good rainfall during key growth stages.

USA

USA

USA 4050 -$1250

TNZ 6070 - $1200

TNZ

Tanzania

The new crop season in Tanzania has begun, with some moisture-related challenges affecting the crop.

PEANUT VOICE

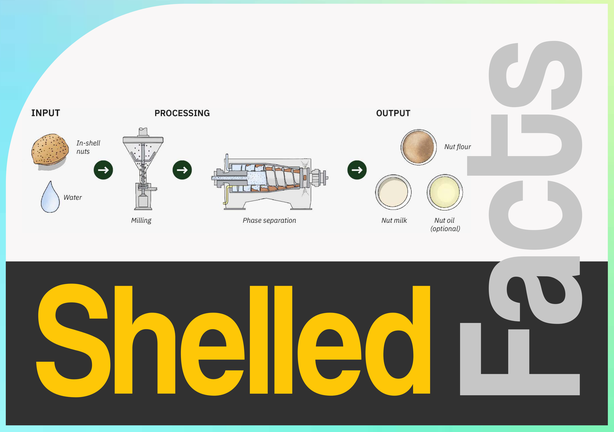
“Chairman of Peanut Chamber and Board Member in agribusiness organizations. He drives a family farm and is a graduate professor. He is Ph.D. in Agronomy, postdoctoral fellowship at the University of Alberta, Canada, and MBA Executive.”

José Rossato

PEANUT CHAMBER

How do you see Brazil’s role in the global peanut market over the next 5–10 years?

Brazil increased the amount of peanut exported three times in the last decade and reached a record volume in the past year. Considering Brazil has land available for agriculture, the pioneer tropical agricultural technology and farmers engaged, we expect to keep growing strategically, shaping our sector and feed the world sustainably.



Stop Shelling, The Shell is the Ingredient!

Why waste 25% of the crop? Re-Nut Inc. has officially “cracked the code” by creating waste to premium ingredients using the whole peanut shell included. This isn’t just a lab experiment; it’s a patented and licensed breakthrough in circular food engineering that’s ready for global scale.

The Science: The process uses a specialised “Wet-Grinding” technique. Whole peanuts (shell+kernel) are ground with water into a slurry, then put through a 3-phase separation system. This physical separation yields: Nut Milk, Oil & Nut flour.

The Innovation Payoff: By transforming shell into edible fiber, they’ve achieved 100% crop utilization. It’s the ultimate “Zero-Waste” play book for a nutritional “High-Fiber” claim without compromising taste.

Reference: Re-Nut Inc. Patent & Licensing Portfolio (2025/26); Food Engineering Industrial Review.

Quality / Science

BEYOND FUMIGATION: THE ENGINEERING PUSH FOR FREQUENCY-BASED PEANUT SAFETY.

Food safety is evolving fast. As global consumers demand cleaner labels and longer shelf lives, the science of how we protect peanuts post-harvest is becoming a serious business differentiator. At the centre of this shift are two critical challenges: disinfestation (eliminating insects and pests) and disinfection (destroying pathogenic microorganisms like Salmonella, Listeria, and E. coli).

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Post-harvest insect infestation alone causes up to 20% crop losses in oilseeds globally. A single microbial contamination event can trigger multi-million dollar recalls, destroy brand trust, and block access to premium export markets. Beyond safety, active enzymes like lipases and oxidases continue silently degrading peanut oil and flavour after harvest, cutting shelf life and eroding product value. Solving these challenges isn't just food safety compliance. It's food security, market access, and profitability.

Chemical fumigation, long the industry standard, is rapidly losing ground due to toxic residues, environmental damage, and tightening global regulations. Three electromagnetic technologies are stepping in.

Parameter	Microwave (MW)	Infrared (IR)	Radio Frequency (RF)
Disinfestation	Good	Moderate	Best
Disinfection	Good	Surface only	Excellent
Enzyme Inactivation	Moderate	Surface only	Very Good
Shelf Life Extension	Good	Good	Excellent
Penetration Depth	2–4 cm	Surface only	Full product
Chemical Residues	None	None	None
Best Use	Blended/roasted products	Surface drying	Bulk & in-shell peanuts

RF wins. Its long electromagnetic waves penetrate the entire peanut shell and kernels, heating insects and microbes faster than the product itself due to their different electrical properties. No chemicals, no hot spots, no quality compromise. Just precise, deep, uniform sterilization.

For the peanut industry, adopting these technologies isn't just a quality upgrade, it's a future-proofing strategy for safer, longer-lasting, chemical-free peanut products.

REFERENCES:

PMC/MDPI Foods (2023) · Food Engineering Reviews, Springer (2024) · ScienceDirect (2024) · FAO Post-Harvest Report (2023)

With Thanks to Our

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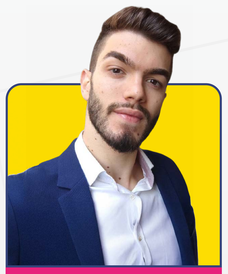

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FHA FOOD & HOSPITALITY ASIA
21-24 APR 2026 SINGAPORE EXPO

SUSTAINABILITY

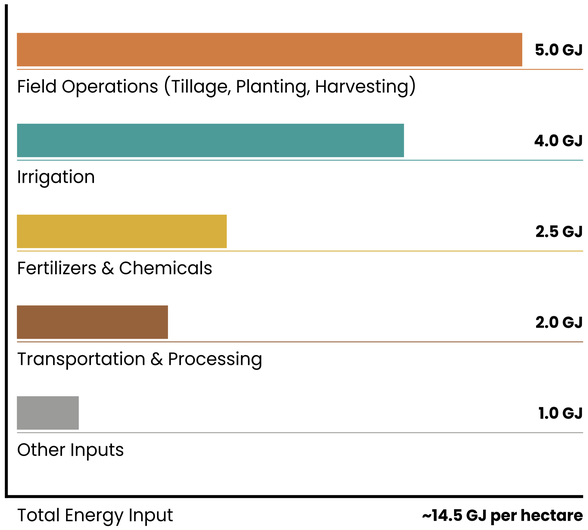
Sustainable Peanut Production: A Life Cycle Energy Analysis

Peanut production is an important agricultural activity that provides food, oil, and income for farmers across many tropical and subtropical regions. However, like most agricultural systems, peanut cultivation requires energy throughout its production cycle. Life Cycle Energy Analysis (LCEA) helps evaluate the total energy consumed and produced during the entire production process—from land preparation and planting to harvesting and processing. By understanding how energy flows through peanut production systems, researchers can identify opportunities to improve efficiency and reduce environmental impacts.

ENERGY INPUTS IN PEANUT FARMING

Energy inputs in peanut cultivation mainly come from fuel for machinery, irrigation, fertilizers, agrochemicals, and transportation. Mechanized operations such as plowing, planting, and harvesting consume a significant amount of diesel energy. Irrigation pumps also require large amounts of electricity or fuel, especially in water-scarce regions.

A SIMPLIFIED ENERGY DISTRIBUTION IN PEANUT FARMING (PER HECTARE) CAN BE ILLUSTRATED AS FOLLOWS:



This graphical representation shows that machinery use and irrigation together account for the largest share of energy consumption in peanut farming systems.

ENERGY OUTPUT FROM PEANUT PRODUCTION

The energy output of peanut production comes mainly from the energy stored in the harvested peanut kernels and oil content. Researchers often calculate this using the calorific value of peanuts multiplied by the crop yield.

$$E_{output} = Y \times CV$$

Where:

- E_{output} = total energy produced (MJ or GJ per hectare)
- Y = crop yield (kg per hectare)
- CV = calorific value of peanuts (MJ per kg)

For example, if peanut yield is 2,500 kg/ha and the calorific value is 18.5 MJ/kg, the total energy output would be approximately 46.25 GJ/ha. This shows that peanut crops store a large amount of usable energy in their biomass.

ENERGY EFFICIENCY AND OPPORTUNITIES FOR IMPROVEMENT

Comparing total input energy (about 14–15 GJ/ha) with output energy (around 45–50 GJ/ha) indicates that peanut production has a positive energy balance. The energy return on energy invested (EROEI) is roughly 3:1, meaning three units of energy are produced for every unit of energy consumed.

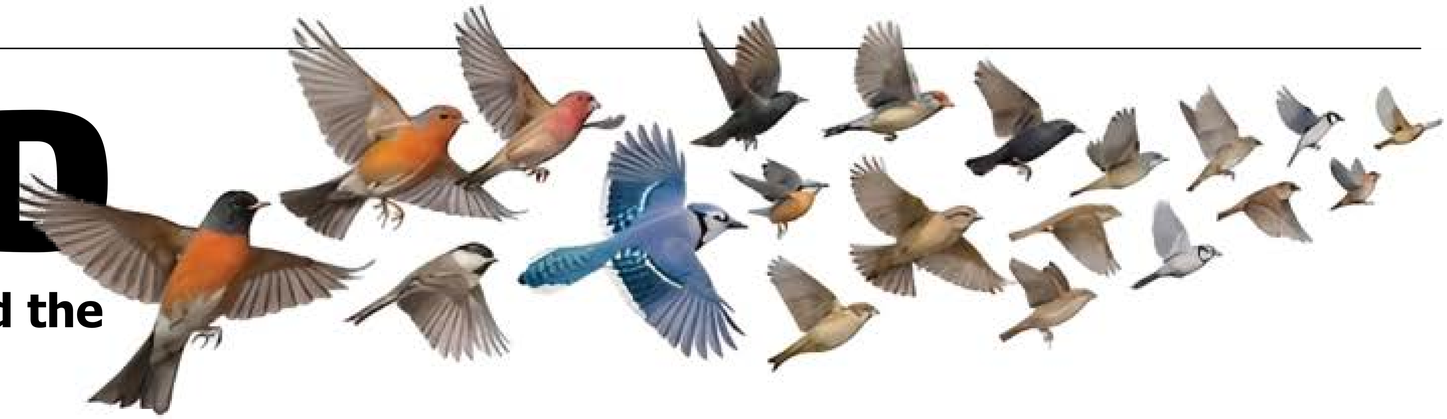
Energy efficiency can be further improved by adopting solar-powered irrigation pumps, reducing excessive tillage, and optimizing fertilizer use through precision agriculture. Additionally, peanut shells and crop residues can be converted into biomass energy or biochar, turning agricultural waste into valuable renewable energy resources.

TOWARD SUSTAINABLE PEANUT PRODUCTION

Life Cycle Energy Analysis provides a clear picture of how energy is used and generated within peanut farming systems. By focusing on the most energy-intensive stages—particularly irrigation and machinery use—farmers and policymakers can introduce technologies that reduce fuel consumption and greenhouse gas emissions. Integrating renewable energy and waste-to-energy solutions can make peanut production not only productive but also more sustainable in the long term.

BIRD FEED

Powering the Skies: How Peanuts Help Feed the World's Birds



1 **Widespread Wildlife** (50B Individuals)

2 **High Energy Needs** (Winter/Migration)

3 **Consistent Food Sources** (Backyard)

4 **Valuable Ingredient** (Peanuts)

5 **Rapid Energy** (High Fat/Protein)

A LOOK AT THE ROLE OF HIGH-ENERGY CROPS IN SUPPORTING WILD BIRD POPULATIONS

Introduction

Birds are one of the most widespread wildlife groups, with an estimated 50 billion individuals across more than 10,000 species. To meet their high energy needs—especially during winter and migration—they rely on consistent food sources.

In many regions, backyard bird feeding helps support birds when natural food is limited. Among common feed ingredients, peanuts are highly valued because they contain about 45–50% fats and around 25% protein, providing birds with a rich and efficient energy source.

How Many Birds Eat Peanuts?

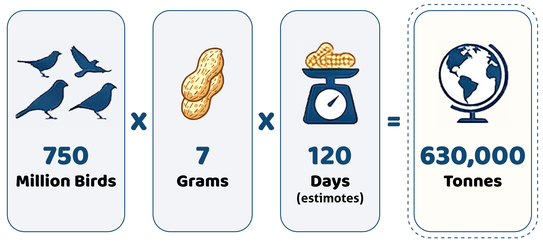
Although peanuts are not a natural food in all habitats, many bird species readily consume them when available at feeders. Studies indicate that more than 50 to 100 bird species can eat peanuts in various forms, including whole kernels, peanut splits, and crushed pieces.

Common visitors to peanut feeders include woodpeckers, jays, chickadees, tits, nuthatches, sparrows, and cardinals. These birds are particularly attracted to the high fat content that provides quick energy. When combining the estimated populations of several common peanut-feeding species, their numbers exceed 750 million birds worldwide.

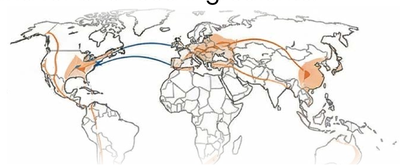
This demonstrates how peanuts can play a meaningful role in supporting bird feeding activities, particularly in regions where feeding birds has become a widespread practice.

Estimating Peanut Demand from Birds

To understand the scale of bird feeding, it is useful to estimate how much food birds might consume. If we assume that 750 million birds occasionally eat peanuts, and each bird consumes around 7 grams per day during a typical 4-month winter feeding period, the numbers quickly become impressive.



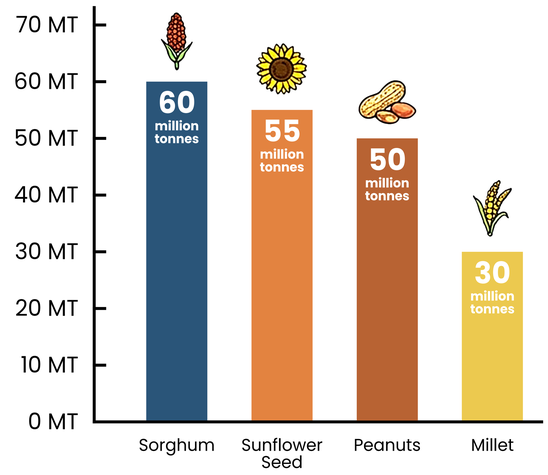
This simple estimate suggests that more than 600,000 tonnes of peanuts could potentially be used annually in bird feeding worldwide. While this represents only a small portion of global peanut production, it highlights how millions of small feeding events combine to form a meaningful demand for bird feed ingredients.



Global Production of Major Bird Feed Seeds

Bird feed typically contains a blend of seeds and grains that appeal to different bird species. The availability of these crops plays a key role in the bird feed supply chain.

APPROXIMATE GLOBAL PRODUCTION OF MAJOR BIRD FEED CROPS



While these crops are primarily grown for human consumption, livestock feed, and oil production, a portion is also used in wildlife feeding products.

Peanuts: A Key Ingredient in a Balanced Bird Diet

Peanuts are valued in bird feed because of their high energy density and strong appeal to many bird species. However, they are most effective when combined with other seeds such as sunflower, millet, sorghum, and maize, which provide dietary variety and attract different birds.

Together, these ingredients form balanced feed mixes that support bird health. As bird feeding continues to grow in popularity, peanuts will remain an important component in helping sustain wild bird populations.

PEANUT SCIENCE

$43 MILLION SPENT. $2.5 MILLION MORE.

THE MISSION TO ELIMINATE PEANUT ALLERGY CONTINUES.

What if the world's most nutritious, affordable protein was locked away from millions, not by cost, but by fear? That's peanut allergy today. And the world is spending serious money to change that forever.

THE LONGEST BET IN FOOD ALLERGY SCIENCE

For over two decades, the National Peanut Board (NPB) has made one unwavering commitment, science can make peanuts safe for everyone. Over $43 million invested. Then on February 25, 2026, they doubled down with a $2.5 million, five-year partnership with FARE (Food Allergy Research & Education), funding the boldest food allergy initiative yet, Mind Meld.

ABOUT MIND MELD

Mind Meld is the same collaborative model that cracked open cancer research breakthroughs at Stand Up To Cancer, now retargeted at food allergy. The goal is straightforward but scientifically profound: bring the world's top immunologists together and retrain the immune system to stop misidentifying harmless peanut proteins as threats. Cancer immunotherapy science, applied to your lunchbox.

RESULTS ALREADY SHOWING

NPB's investment is already delivering. Early Introduction research proved that introducing peanuts to infants early dramatically cuts allergy risk. A landmark 2026 CHOP study confirmed a 27% drop in peanut allergy diagnoses and 38% fewer overall food allergies. A generation of children is growing up eating peanuts safely. Science working exactly as it should.

> "The peanut's future is inevitable."

THE BIGGER PICTURE

Peanuts already win on nutrition, sustainability, affordability, and versatility. Remove the allergy barrier, and you unlock a global market worth billions. NPB is calling on food industry partners worldwide to join Mind Meld. The research pipeline is live, the momentum is real, and the finish line is in sight.

REFERENCES:

National Peanut Board / FARE Announcement (Feb 25, 2026)

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PEANUT BLOG

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