

May 8, 2025

Eventell Global Advisory Pvt Ltd

GLOBAL Peanut weekly

Market Insights

Volume – 02: Issue 20



SUMMARY

China: Market remains range-bound with limited farmer arrivals and cautious demand; oil mills continue selective buying of high-quality stock.

USA: Peanut planting has reached 18%, slightly below last year but ahead of the 5-year average, showing steady progress post early drought delays.

Senegal: Groundnut trade remains sluggish despite the export ban being lifted, with supply exceeding demand and prices stable at 305–330 FCFA/kg.

Côte d'Ivoire: Groundnut market conditions remain stable, with old stocks nearly exhausted at the producer level and remaining volumes driving prices upward.

Brazil: São Paulo's harvest is nearly complete with mixed yield and quality; March exports rose significantly, led by a 252% surge in peanut oil shipments to China.

India: Summer crop remains well below normal due to weather-related issues, while prices show signs of softening despite steady government support and procurement.

CHINA

- ✚ On the supply side, farmers are busy with the season, so arrivals are limited and scattered. However, with temperatures rising, storing peanuts is getting harder, and many sellers are more willing to ship to avoid spoilage.
- ✚ On the demand side, buyers are cautious, and holiday demand was lower than expected.
- ✚ Oil mills are only buying limited quantities, and mostly high-quality stock, which is helping support current market prices.
- ✚ Sellers are more active, while buyers are following hand to mouth approach and buy only when needed. As a result, prices are expected to stay range-bound in the short term.

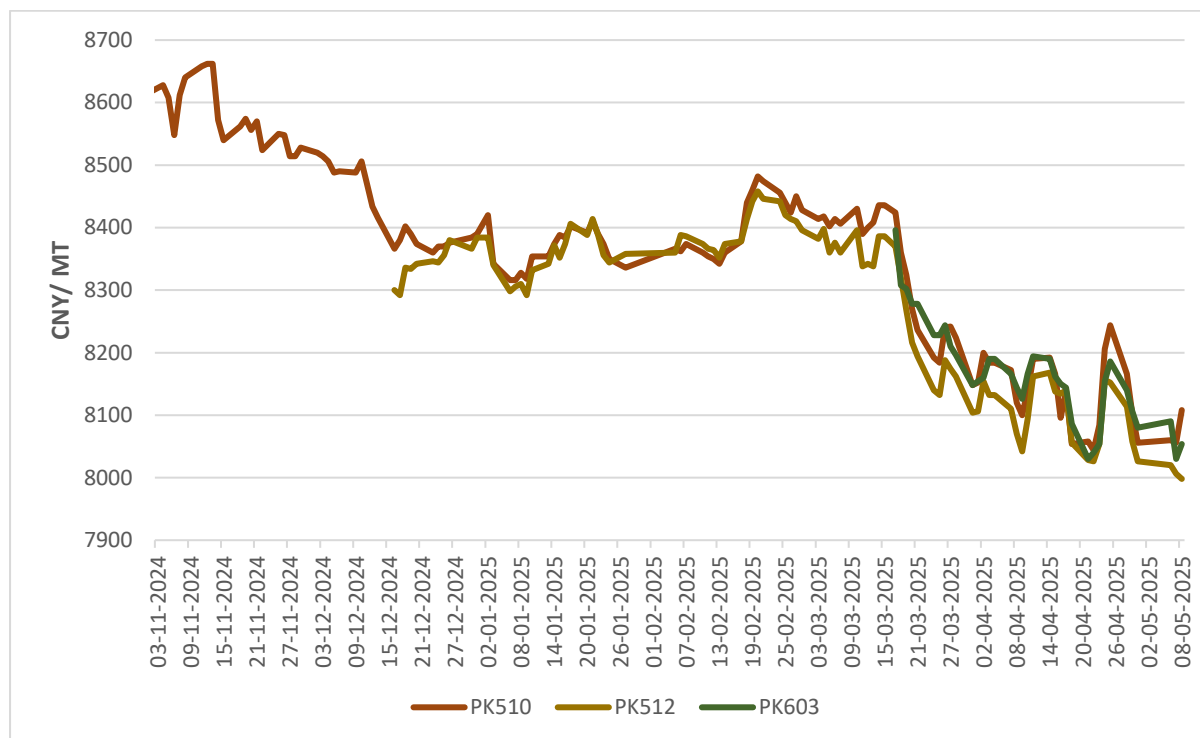
CZCE Daily Trading Data (2025-05-08)

<i>Contract Month</i>	<i>Prev. Settle</i>	<i>Open</i>	<i>High</i>	<i>Low</i>	<i>Close</i>	<i>Settlement</i>	<i>Change</i>	<i>Volume</i>	<i>Open Interest</i>	<i>OI Change</i>	<i>Turnover</i>
PK505	7800	7802	7802	7800	7800	7802	2	20	283	-20	0.78
PK510	8056	8076	8150	8054	8136	8108	52	45178	82484	-1956	1831.28
PK511	7980	7996	8026	7954	8014	7986	6	15834	31253	7674	632.26
Total								61547	117310	5735	2485.00

Note:

- 1) In Contract PK510, PK denotes Peanut Kernel, 5 denotes year 2025, and 10 denotes month i.e., October.
- 2) Price Unit: Yuan/Metric Ton
- 3) Lot size: 5 Metric Ton/lot
- 4) Volume, Open Interest: Lot (Single-Counted)
- 5) Turnover: Million Yuan (Single-Counted)
- 6) Change: Settlement minus Prev. Settle

Zhengzhou Commodity Exchange – Peanut Kernel Forward Curve as Observed on Various Dates



Settlement price comparison (Futures Contract)

(Source: Zhengzhou Commodity Exchange)

Week-on-Week

Contract	6th May	30th April	% Change
May	7802	7848	-0.59%
Oct	8108	8056	0.65%
Nov	7986	7998	-0.15%
Dec	7998	8026	-0.35%
Jan (2026)	8046	8042	0.05%
Mar (2026)	8054	8080	-0.32%

Price Unit: Yuan/Metric Ton

Year-on-Year

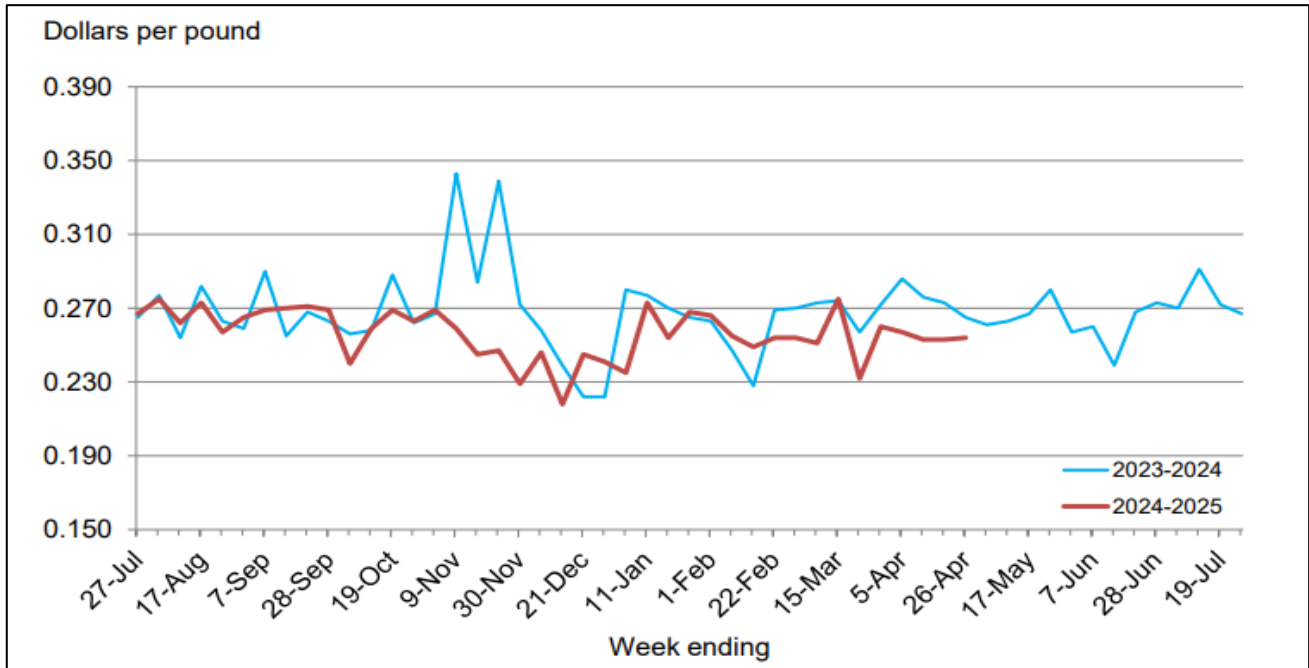
Contract	81th trading day (8th May 2025)	79th trading day (6th May 2024)	% Change
Oct	8108	9130	-11.19%
Nov	7986	8948	-9.39%
December	7998	8948	-10.75%
January	8046	8962	-10.76%
March	8054	8964	-10.24%

Price Unit: Yuan/Metric Ton

USA

- U.S. peanut planting has progressed to 18%, slightly below last year's pace of 20%, but still ahead of the 5-year average of 16%, showing a steady recovery following initial drought-related delays.
- Peanut prices farmers stock (April 26 week ending) – 25.4 cents per pound, up by 0.1 cents from the previous week. Quantity purchased from farmers (April 26 week ending) totalled 114.0 million pounds, up 2.69 million pounds (Week on Week).

All Peanut Prices – United States (Source: USDA)



Peanut Prices and Marketings by Type – United States (Source- USDA)

Item and type	Week ending				
	March 29, 2025	April 5, 2025	April 12, 2025	April 19, 2025	April 26, 2025
	(dollars per pound)	(dollars per pound)	(dollars per pound)	(dollars per pound)	(dollars per pound)
Average price					
Runner	0.260	0.257	0.251	0.248	0.254
Spanish	(X)	(X)	(X)	(X)	(X)
Valencia	(X)	(X)	(X)	(X)	(X)
Virginia	(X)	(X)	0.274	0.272	(X)
All	0.260	0.257	0.253	0.253	0.254
	(1,000 pounds)	(1,000 pounds)	(1,000 pounds)	(1,000 pounds)	(1,000 pounds)
Marketings ¹					
Runner	85,999	106,178	114,401	88,047	113,702
Spanish	-	-	-	-	-
Valencia	-	-	-	-	-
Virginia	-	-	14,081	22,963	-
All	85,999	106,178	128,482	111,010	113,702

- Represents zero.

(X) Not applicable

¹ Quantity purchased from farmers

SENEGAL

- ✚ In Senegal, the groundnut market remains largely unchanged, continuing at a similar pace as previous months. The removal of the export ban has had little impact, with supply still outpacing demand.
- ✚ Prices remain stable between 305–330 FCFA/kg, and overall trade activity is limited. As of April 20, SONACOS facilities had received 154,744 MT of in-shell groundnuts. Both cooperatives and stockholders are facing limited selling opportunities in the current market.

CÔTE D'IVOIRE

- ✚ Groundnut market conditions remain stable, with old stocks nearly exhausted at the producer level and remaining volumes driving prices upward.
- ✚ Fresh lowland groundnuts are available in limited quantities for consumption but at high prices due to strong demand and tight supply.
- ✚ Producer sentiment is positive, with expanded planting expected this season, supported by favorable rains and disappointment in cashew returns.
- ✚ Wholesale prices range from 600–950 FCFA/kg, while retail prices vary between 650–1,000 FCFA/kg.

BRAZIL

- ✚ The harvest in São Paulo (accounting 80% of peanut crop in Brazil) is almost over.
- ✚ With regard to quality and yield there has been mixed outcome with some harvests giving great quality and yield up to 4.5 MT/Ha and some other occasions where due to drought observed in month of February resulting in lower yield and aflatoxin issues. Therefore, it is still early to estimate the total outcome of average yield and total production.
- ✚ During month of March Brazil's Peanut kernel exports observed a 17% increase totalling 15,100 MT compared to March 2024.
- ✚ With respect to Peanut oil exports during the month of March Brazil exported 10,200 MT, a 252% increase compared to March 2024. China imported 80% of peanut oil in March.

INDIA

- ✚ As of the first week of May 2025, India's summer groundnut crop remains significantly below normal.
- ✚ Unseasonal rains, pest pressures, and temperature fluctuations have affected both yield and kernel quality. While government auctions and NAFED procurement continue to support the market, overall sentiment is cautious, and prices are showing signs of softening amid sluggish demand and adequate stock availability.
- ✚ The area under peanut for 2025 summer crop in India rose up by 4.8% compared to last year to 431,000 Hectares.

Indian Prices and Arrivals Data (30th April – 6th May)

<i>States</i>	<i>Arrivals (MT)</i>	<i>Unit Value (INR/Kg)</i>	<i>% Change (Week-on-week)</i>
Gujarat	3229.54	51.2	1.08%
Uttar Pradesh	2598.50	47.0	-1.60%
Madhya Pradesh	793.06	46.3	-2.30%
Andhra Pradesh	783.20	56.3	-8.41%
Maharashtra	774.89	55.8	-2.23%
Karnataka	451.00	47.6	-4.55%
Rajasthan	355.81	48.5	-2.31%
Telangana	283.74	54.0	-4.54%
Tamil Nadu	47.86	64.5	0.54%
Chhattisgarh	4.00	57.1	30.07%
Grand Total	9321.60	50.3	-1.72%

Source: Agmarknet.gov.in

Indian Export Trend

<i>HS Code</i>	<i>Product Details</i>	<i>17th – 30th April 2025</i>	
		<i>Quantity (In MT)</i>	<i>Unit Value (USD/Kg)</i>
12023010	Ground-Nuts HPS of Seed Quality in Shell (Not Roasted or Cooked)	-	-
12023090	Other Ground-Nuts of Seed Quality	87.70	1.305
12024110	Other Ground-Nuts HPS Not of Seed Quality in Shell (Not Roasted or Cooked)	157.15	0.743
12024190	Other Groundnuts in Shell (Not Roasted or Cooked)	543.38	0.836
12024210	Shelled Groundnuts Kernel HPS	27899.91	1.090
12024220	Shelled Groundnuts Kernel, Others	367.78	1.018
12024290	Other Groundnuts	57.82	1.326
Grand Total		29113.73	1.084

Destination-wise Exports (17th – 30th April 2025) (HS Code- 12024210)

<i>Destination Country</i>	<i>Quantity (MT)</i>	<i>Unit Value (USD/Kg)</i>	<i>% Week-on-Week Change</i>
INDONESIA	7543.10	0.974	1.3%
VIETNAM	5411.84	1.105	-1.1%
THAILAND	4218.00	1.192	-1.3%
CHINA	2465.76	0.866	0.1%
MALAYSIA	2113.46	1.035	3.0%
BANGLADESH	1299.95	0.765	1.3%
PHILIPPINES	901.68	1.057	2.1%
RUSSIA	696.00	1.088	0.7%
UNITED ARAB EMIRATES	431.73	1.066	-13.8%
ALGERIA	383.00	1.118	11.1%
NETHERLANDS	327.81	1.961	8.1%
Others	2107.58	1.662	-
Grand Total	27899.91	1.090	3.0%

Indian Port-wise Exports (17th – 30th April 2025)

<i>Indian Ports</i>	<i>Quantity (MT)</i>	<i>Unit Value (USD/Kg)</i>
MUNDRA	14196.21	1.044
12023090	76.02	0.964
12024190	105.68	0.779
12024210	13663.73	1.049
12024220	329.78	1.033
12024290	21.00	0.987
TONDIARPET ICD	5122.00	1.204
12024210	5122.00	1.204
PIPAVAV (VICTOR)	4086.89	0.950
12024210	4048.89	0.949
12024220	38.00	0.958
Others	5708.64	1.171
Grand Total	29113.73	1.084

FOREX (Against USD)

<i>Currency</i>	<i>30rd April</i>	<i>8th April</i>	WOW Change in %	Year to Date % Change
<i>Argentine Peso: ARS</i>	1165.01	1145.00	-1.72%	11.08%
<i>Brazilian Real: BRL</i>	5.62	5.75	2.31%	-2.54%
<i>Chinese Yuan Renminbi: CNY</i>	7.27	7.23	-0.55%	-0.96%
<i>Indian Rupee: INR</i>	84.57	85.52	1.12%	-0.31%
<i>Mozambican Metical: MZN</i>	64.00	63.90	-0.16%	1.00%
<i>Nigerian Naira: NGN</i>	1602.91	1607.72	0.30%	4.06%
<i>Sudanese Pound: SDG</i>	600.50	600.50	0.00%	0.42%
<i>Tanzanian Shilling: TZS</i>	2690.00	2687.49	-0.09%	10.37%
<i>Euro: EUR</i>	0.88	0.88	0.00%	-9.28%
<i>West African CFA Franc: XOF</i>	577.17	580.54	0.58%	-8.56%
<i>Turkish Lira: TRY</i>	38.50	36.63	-4.86%	3.56%

Note:

- *A positive (+) change indicates a depreciation of the mentioned currency.*
- *A negative (-) change indicates an appreciation of the mentioned currency.*
- *Year-to-Date % Change reflects the currency's value fluctuation from January 1, 2025, to February 12, 2025.*

Contact us

Analyst – *Nikshep Anthony*, to provide feedback & suggestions, write to consulting@eventellglobal.com or contact at +91 9513333926.

To receive this report regularly, write to Swapna Gowda at swapna@eventellglobal.com

To advertise in this report, write to swapna@eventellglobal.com

Eventell Global Advisory Private Limited

Corporate portal:

www.eventellglobal.com

Info portals:

www.sesameinfo.in

www.cashewinformation.com

www.bullionworld.in

Conference portals:

www.cashewconference.com

www.sesameconference.com

www.allindiacashew.com/AICA2024/

www.goldconference.in

www.asiapacificpmc.com

www.silverconference.in

Social initiative portals:

www.cashewwomen.com

www.cashewishealthy.com

Disclaimer: The data and information presented in this report are based on the efforts of analysts at Eventell Global Advisory Pvt Ltd, Bangalore, and opinions and data obtained from experts and various industry sources. While sufficient care has been taken to, check data and information prior to publishing, Eventell or its employees or external contributors will not be responsible for any kind of errors or omissions or misrepresentation of data or for losses incurred by any party either directly or indirectly based on the information published herein.



WORLD SESAME & PEANUT

CONFERENCE



Organised by

Sesameinfo.in

Global Knowledge hub

**MARK YOUR
NEW DATES**

5-7
SEPT | **2025**

**HYATT REGENCY
ISTANBUL**



www.peanutconference.com