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Eventell Global Advisory Pvt Ltd

GLOBAL Peanut weekly

Market Insights

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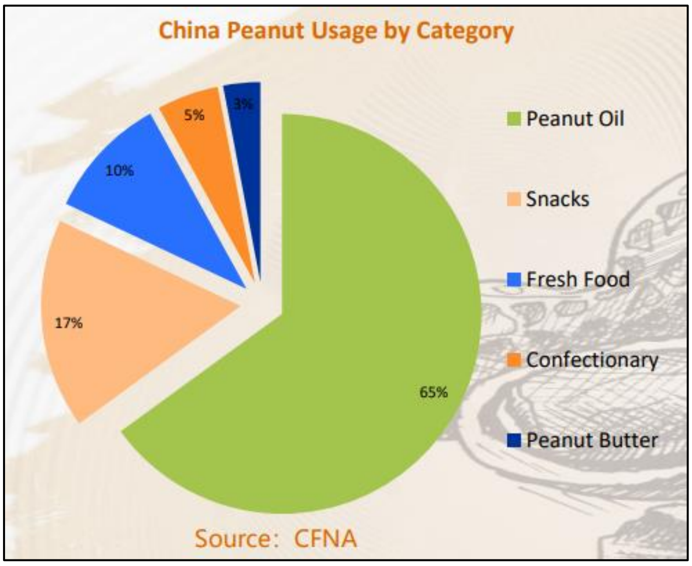
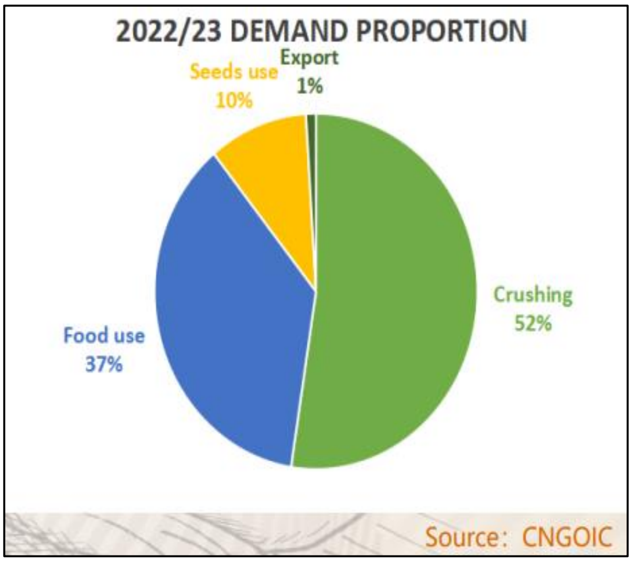
NOTE

This week's **Peanut Weekly Report** is a summary of country-wise peanut market presentations delivered by various speakers at the **World Sesame and Peanut Conference 2025**, held in **Istanbul from September 5–7, 2025**. The insights highlight production trends, trade dynamics, policy developments, and future outlooks across key producing and consuming countries. For access to the complete presentations and detailed analysis, please visit www.peanutconference.com.

CHINA

- China's Peanut Crop Prospects: Main planting areas (Henan, Shandong, Hebei, Northeast) account for 70%+ of production. Planting area and yields are rising, with 25/26 production expected at 10.5 million tons-second highest in a decade.
- Domestic Market: China is the largest producer and consumer of peanut oil, with stable consumption concentrated in major cities and provinces. Usage is led by oil (65%), followed by snacks, fresh food, confectionery, and peanut butter.





- Import Trends: Peanut imports peaked at ~1 million tons in 2020-21 but have since declined due to stronger domestic supply, demand slowdown, and geopolitical factors. Imports now center on Africa, benefiting from tariff-free policies.
- Peanut Oil Imports: Diversified sourcing from Asia, Africa, and South America (230,000–280,000 tons annually). India and Brazil are major suppliers, closely tied to peanut import volumes and crushing margins.
- Future Outlook: Oversupply versus weak domestic demand may pressure prices. Expanding African access, domestic policy support, and seasonal harvest surpluses will shape market dynamics; long-term high prices may be unsustainable.

China Peanut Imports

UNIT: MT	PEANUT KERNEL				PEANUT IN SHELL			
COUNTRIES	2022	2023	2024	2025.1-7	2022	2023	2024	2025.1-7
USA	1,487	400	100	0	87,112	119,246	92,626	34,114
ARGENTNA	8,611	12,327	1,798	3,281	-	-		
INDIA	5,863	6,671	1,895	25,553	-	-		
SENEGAL	180,592	173,375	306,004	14,475	-	-		
SUDAN	362,382	345,412	351,896	16,611	-	-		
OTHERS	17,532	2,180	3,247	15,361	487	1,091	1,949	4,180
TOTAL	576,467	540,365	664,940	75,281	87,599	120,337	94,575	38,294

China Peanut Oil Imports

UNIT : MT	PEANUT OIL				
	2021	2022	2023	2024	2025.1-7
ARGENTNA	21,258	32,155	29,590	13,169	19,670
BRAZIL	52,336	122,649	83,611	32,361	62,053
INDIA	165,624	59,204	116,667	198,659	133,940
SUDAN	24,551	9,751	8,773	0	0
SENEGAL	1,847	1,882	2,422	835	3051
USA	5,310	2,139	93	200	46
Others	9,825	2950	6,566	9326	4321
Total	280,751	230,730	247,723	254,551	223,082

USA

- 1.8M acres planted, 1.76M harvested, yielding 3.2M FST with 3,668 lb/acre average yield. Export volumes fell 19% YoY, with steep declines to China, EU, UK, and Japan; Canada was the only growth market (+12%).
- 2025/26 Crop Outlook: Estimated 1.94M acres planted and 1.89M harvested, projecting 3.66M FST production and higher yields at 3,838 lb/acre.
- As of Aug. 24, 2025, 72% of crop rated good-to-excellent. Southeast weather has improved with rainfall, while Arkansas remains hot and dry but benefits from irrigation.
- Key Challenges: High input costs, low commodity prices, policy uncertainty, and risks from increased acreage pressuring contract prices. Farmers also reducing tillage/pesticide use, raising quality concerns.
- Long-Term Risks: Shorter crop rotations could elevate disease pressure, while consumer trends (GLP-1 use, alternative protein foods) may dampen demand growth.

U.S Domestic Consumption

Month(1000 #)	Peanut candy	Snack peanuts	Peanut butter	Total edibles	In-shell P'nuts
August 24 - Jul 25	391,079	426,415	1,467,230	2,345,021	133,796
August 23 - Jul 24	410,241	405,757	1,452,793	2,323,489	139,891
	DOWN – 4.7 %	UP + 5.1 %	UP + 1.0%	UP+.93 %	DOWN -4.4%
Jul 25 vs Jul 24	DOWN- 3.8%	UP + 11.5%	UP + 1.7%	UP +2.5%	UP +1.4%

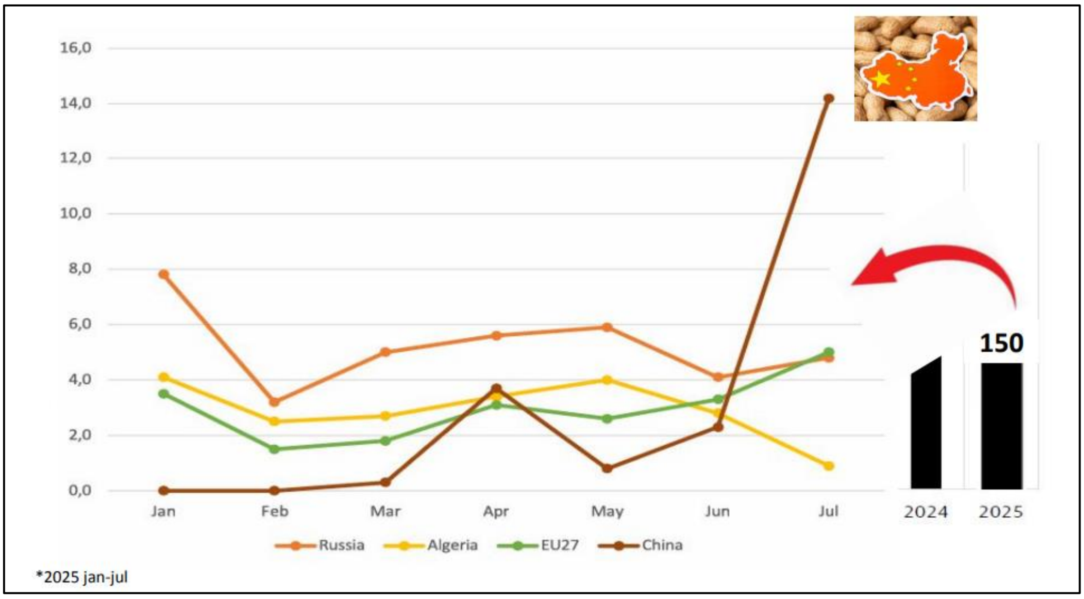
2025/26 Crop Progress

State	(NASS) Area Planted (1,000 acres)				Percent Prev. Yr.
	2024	2025 (Mar)	2025(Aug)	2025(FSA)	Percent Prev. Yr.
Alabama	190.0	195.0	195.0	192,938	+1.5%
Arkansas	45.0	45.0	47.0	45,877	+1.9%
Florida	165.0	180.0	175.0	170,360	+3.2%
Georgia	850.0	950.0	915.0	908,532	+6.9%
Mississippi	26.0	30.0	21.0	20,034	- 22.9%
Missouri	24.0	25.0	25.0	25,499	+6.2%
North Carolina	130.0	135.0	140.0	136,262	+4.8%
Oklahoma	19.0	20.0	20.0	17,761	-6.5%
South Carolina	82.0	90.0	90.0	88,214	+7.6%
Texas	240.0	250.0	280.0	277,013	+15.4%
Virginia	30.0	30.0	33.0	31,739	+5.9%
U.S. Total	1,801.0	1,950.0	1,941.0	1,934,191	+7.4%
		Louisiana – 3,734; Nebraska – 135; New Mexico – 15,036			

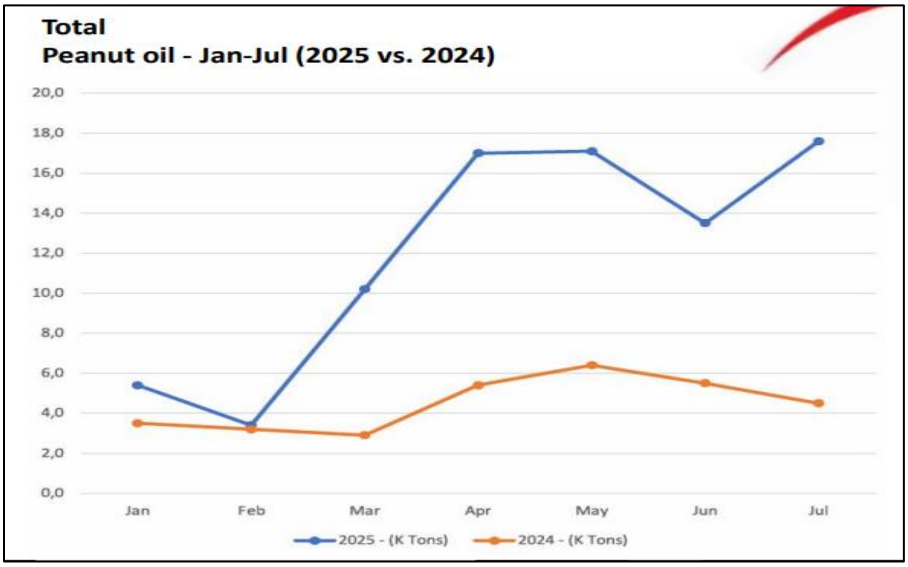
BRAZIL

- 2024/25 Crop Performance: 330,000 ha planted, with yields of 3.5 t/ha, producing 1.33M tons in-shell and 1.01M tons kernels. Exports included 270,000 tons edible peanuts and 200,000 tons oil.
- Export Trends: 2024 saw sharp declines vs. 2023 - peanut kernel exports down 24% and peanut oil exports down 43%, partly due to quality issues flagged in early 2025.
- 2025/26 Outlook: Acreage is expected to drop 20–30%, raising concerns about supply compared to 2023's record levels.
- Market Drivers: Export demand remains the main force behind acreage expansion, but weaker global prices and tighter margins are dampening growth.
- Key Challenges: Quality concerns (RASFF alerts for EU market), price volatility, and reduced planting area threaten Brazil's competitiveness in the coming season.

2025 Brazil Peanut Export Pattern



Brazil Peanut Oil Export Trend (2025 vs 2024)



ARGENTINA

- 2024/25 Crop Area: Planted 514,000 ha, the largest in over a decade, with Córdoba dominating (64%) but significant expansion also in Buenos Aires (18%) and La Pampa (6.5%).
- Average yield of 2.47 MT/ha, recovering from weaker 2022/23 levels but below the 2020–21 peak of 2.94 MT/ha.
- 2024 peanut exports totaled ~409,000 tons to the EU, 98,000 tons to "other high aflatoxin limit" markets, and ~145,000 tons to other destinations.
- Argentina strengthened its position as top supplier, with shipments to the EU rising from 129,000 tons in Jan–Jun 2024 to 221,000 tons in the same period of 2025.
- Strong export growth to Europe despite fluctuating yields; Argentina remains a critical supplier for EU demand, supported by competitive pricing and large-scale planting expansion.

Planted area in Argentina by Province

	2019-20		2020-21		2021-22		2022-23		2023-24		2024-25	
Córdoba	289,366	82.44%	324,237	78.70%	312,289	75.07%	275,820	74.15%	309,851	74.48%	330,813	64.39%
Buenos Aires	24,272	6.92%	38,204	9.27%	49,904	12.00%	44,074	11.85%	53,764	12.92%	93,285	18.16%
San Luis	10,348	2.95%	12,929	3.14%	19,632	4.72%	18,182	4.89%	16,187	3.89%	11,488	2.24%
La Pampa	15,733	4.48%	20,162	4.89%	16,597	3.99%	16,665	4.48%	16,182	3.89%	33,551	6.53%
Santa Fe	5,417	1.54%	9,419	2.29%	9,061	2.18%	8,941	2.40%	11,450	2.75%	13,728	2.67%
Salta	3,362	0.96%	3,622	0.88%	4,711	1.13%	3,917	1.05%	3,095	0.74%	2,225	0.43%
Otras Pcias.	2,502	0.71%	3,428	0.83%	3,805	0.91%	4,401	1.18%	5,470	1.31%	28,703	5.59%
TOT	351,000	100.00%	412,000	100.00%	416,000	100.00%	372,000	100.00%	416,000	100.00%	513,793	100.00%

EU Peanut Imports Jan – Jun 2025 (HS Code – 120242)

	2024	2025
Argentina	129,196	220,884
Brazil	23,617	14,810
China	34,054	35,287
India	5,802	4,673
Nicaragua	14,220	9,247
United States	57,809	21,152
Other countries	9,190	6,950
Total	273,888	313,003

SUDAN

- Production Trends: Output peaked at 2.0M tons unshelled in 2022/23 but collapsed to 683,000 tons in 2023/24 due to conflict, with partial recovery in 2024/25 to 1.12M tons.
- Major Cultivation Areas: Western regions (Darfur, Kordofan) dominate production, mostly rainfed, with some irrigated areas in El Gezira.
- Exports: Sudan exported over 450,000 tons in 2020–21 but collapsed to just 3,176 tons in 2025 due to war disruptions. China is the dominant buyer (68%), followed by Egypt (12%) and India (9%).
- Conflict Impact: War has disrupted farming, trade, and transport; closed banks; raised costs; and undermined private sector participation, leading to major supply chain breakdowns.
- Outlook & Challenges: Without price support in China and given high conflict-related costs, Sudan struggles to compete despite production potential; humanitarian crisis further worsens agricultural stability.

Sudan Peanut Exports 2024-25

COUNTRY	VALUE ('000 $)	SHARE	MT	RANK
CHINA	197,530	67.6%	242,512	1
EGYPT	34,251	11.7%	42,051	2
INDIA	26,612	9.1%	32,672	3
UAE	23,054	7.9%	28,304	4
PAKISTAN	4,048	1.4%	4,970	5
HONG KONG	3,238	1.1%	3,975	6
TURKEY	1,056	0.4%	1,296	7
JORDAN	951	0.3%	1,168	8
INDONESIA	664	0.2%	815	9
OTHERS	880	0.3%	1,080	

SENEGAL

- Strategic Role: Senegal is a leading West African peanut producer, with SONACOS SA (state-backed) driving the value chain - from collection and processing to refining and exports. The sector supports ~22% of the population (~4M people).
- Production: 2024/25 crop reached ~732,000 tons. For 2025/26, planting is complete with expected growth of 8–10% in acreage and 5–7% in yield, projecting ~850,000 tons (+15% YoY).
- Government Policy: The state enforces an export ban on raw peanuts until April each year to secure supply for processors; SONACOS' leadership in the value chain is being reinforced by government action.
- Industrial & Trade Capacity: SONACOS operates multiple plants with >3,000 tons/day processing, producing refined/crude oils, animal feed, fertilizer, and export kernels. Products comply with international standards.
- Outlook: Exports are forecast at 50,000 tons crude oil and 70,000 tons kernels for 2025/26. Senegal also enjoys a 10% tax advantage in the Chinese market, which is expected to boost trade flows.

Production and SONACOS Procurement

Seasons	Total Crop	SONACOS Procurement	% age
2018/19	1 502 174	85 361	6%
2019/20	1 421 288	28 770	2%
2020/21	1 797 486	67 312	4%
2021/22	1 677 804	129 285	8%
2022/23	1 501 498	22 893	2%
2023/24	1 727 563	12 933	1%
2024/25	731 543	155 578	21%

Peanut procurement price of last 6 seasons (1 $ = 560 F CFA)

SEASONS	OFFICAL PRICE	SONACOS PRICE (F/kg)		Competition Price
		Price Evolution	Average Price	
2019/2020	210 F	238 F; 300 F	298 F	250 F à 350 F
2020/2021	250 F	277 F; 320 F	320 F	300 F à 350 F
2021/2022	250 F	296,5 F	296,5 F	300 F à 350 F
2022/2023	275 F	310 F; 450 F	402 F	325 F à 425 F
2023/2024	280 F	307 F; 350 F	329 F	325 F à 400 F
2024/2025	305 F	335 F; 339 F	338,35 F	-

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