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Eventell Global Advisory Pvt Ltd

GLOBAL Peanut weekly

Market Insights

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SUMMARY

China: Peanut markets remain stable with cautious trading and slightly firm prices amid limited supply and demand-based buying.

USA: Peanut planting is progressing steadily, though exports fell sharply due to reduced demand from China.

Argentina: Despite harvest delays, production is slightly up, but future output may decline due to high costs and reduced seed retention.

Brazil: New trade access to China for peanut meal boosts export opportunities following increased agricultural cooperation.

India: Exports to Indonesia are delayed by new aflatoxin regulations, softening domestic markets while export volumes remain strong.

CHINA

- 🚩 Peanut markets across major production areas in China remain generally stable with limited supply and moderate trading activity.
- 🚩 In Hebei and Jilin, market sentiment is sluggish due to low supply and limited trading. Henan sees slightly firmer prices amid improved downstream demand, while Shandong and Liaoning trade was limited to inventories
- 🚩 Prices across regions range mostly between 6.00-9.00 CNY/Kg, depending on variety and quality, with Baisha rice is generally priced between 8.00 – 8.20 CNY/Kg across most regions.
- 🚩 The domestic peanut market is stable with slight gains; buyers remain cautious, purchasing based on demand. High prices are hard to close, and trading is moderate. Prices are expected to stay firm and slightly volatile in the short term.

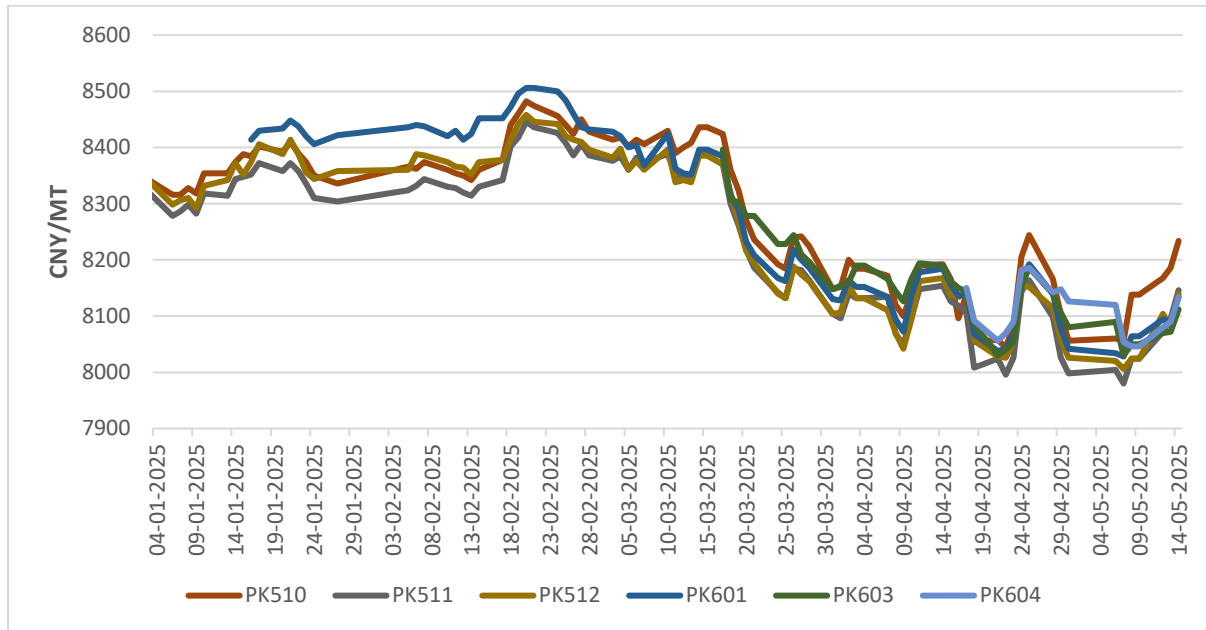
CZCE Daily Trading Data (2025-05-14)

Contract Month	Prev. Settle	Open	High	Low	Close	Settlement	Change	Volume	Open Interest	OI Change	Turnover
PK510	8186	8202	8258	8192	8236	8234	48	43130	92739	4727	1775.41
PK511	8096	8100	8172	8084	8154	8146	50	13305	49341	2720	541.90
PK601	8090	8100	8150	8088	8128	8134	44	247	2774	62	10.05
Total								56729	145668	7506	2329.27

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

<i>Contract</i>	<i>14th May</i>	<i>7th May</i>	<i>% Change</i>
<i>Oct</i>	8234	8056	2.21%
<i>Nov</i>	8146	7980	2.08%
<i>Dec</i>	8140	8006	1.67%
<i>Jan (2026)</i>	8134	8028	1.32%
<i>Mar (2026)</i>	8112	8030	1.02%

Price Unit: Yuan/Metric Ton

Year-on-Year

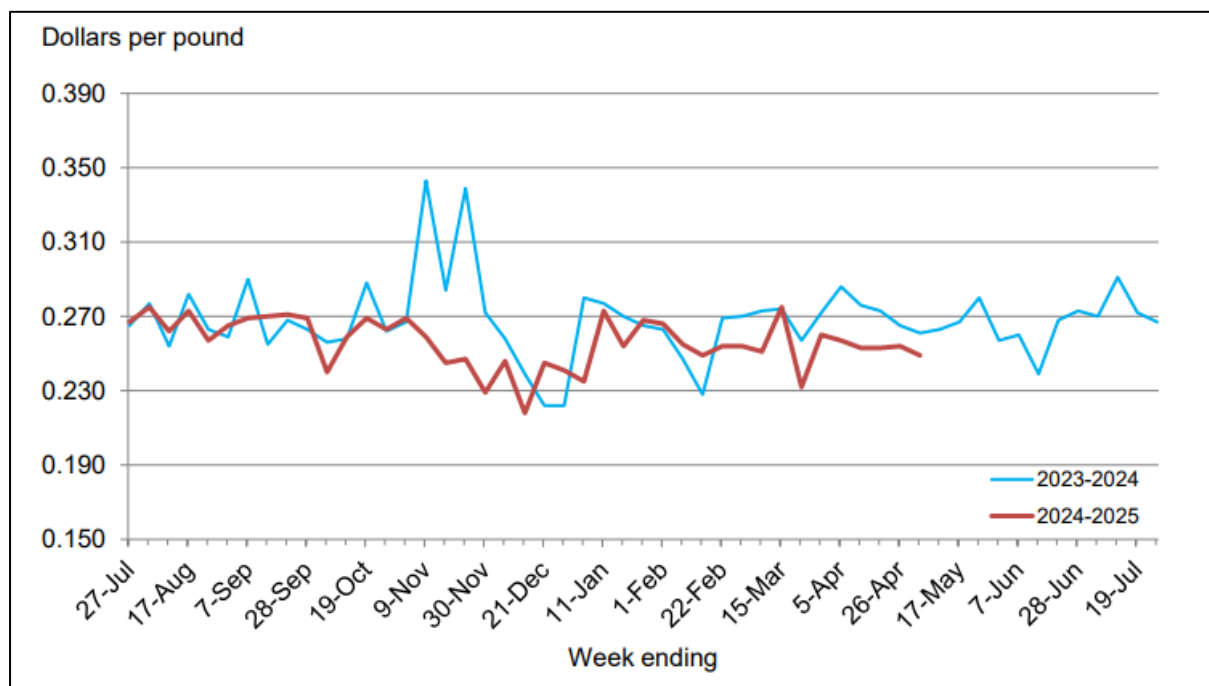
<i>Contract</i>	<i>85th trading day (14th May 2025)</i>	<i>85th trading day (14th May 2024)</i>	<i>% Change</i>
<i>Oct</i>	8234	9178	-10.29%
<i>Nov</i>	8146	9010	-8.61%
<i>December</i>	8140	9018	-9.67%
<i>January</i>	8134	9018	-9.74%
<i>March</i>	8112	9014	-9.76%

Price Unit: Yuan/Metric Ton

USA

- U.S. peanut planting has progressed to 34%, slightly below last year's pace of 37%, but still ahead of the 5-year average of 32%, with around half the planting in Florida and Virginia completed.
- Peanut prices farmers stock (May 3 week ending) – 24.9 cents per pound, down by 0.5 cents from the previous week. Quantity purchased from farmers (May 3 week ending) totalled 137.0 million pounds, up 23.2 million pounds (Week on Week).
- The U.S. exported 108,181 MT of peanuts in the first quarter of 2025, marking a **19.44% decline** compared to the same period in 2024. This drop is largely due to a sharp 50% decrease in exports to China, which totalled only 14,398 MT in Q1 2025.

All Peanut Prices – United States (Source: USDA)



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

Item and type	Week ending				
	April 5, 2025	April 12, 2025	April 19, 2025	April 26, 2025	May 3, 2025
	(dollars per pound)	(dollars per pound)	(dollars per pound)	(dollars per pound)	(dollars per pound)
Average price					
Runner	0.257	0.251	0.248	0.254	0.245
Spanish	(X)	(X)	(X)	(X)	(X)
Valencia	(X)	(X)	(X)	(X)	(X)
Virginia	(X)	0.274	0.272	(X)	0.272
All	0.257	0.253	0.253	0.254	0.249
	(1,000 pounds)	(1,000 pounds)	(1,000 pounds)	(1,000 pounds)	(1,000 pounds)
Marketings ¹					
Runner	106,178	114,401	88,047	113,702	119,412
Spanish	-	-	-	-	-
Valencia	-	-	-	-	-
Virginia	-	14,081	22,963	-	17,457
All	106,178	128,482	111,010	113,702	136,869

- Represents zero.

(X) Not applicable

¹ Quantity purchased from farmers

ARGENTINA

- ✚ Peanut production in Córdoba for the 2024/25 season is projected to reach 727,000 metric tons, showing a 2% year-over-year increase despite recent weather-related harvest delays.
- ✚ Favourable conditions during the key yield-setting stage helped boost output, even as rain has complicated crop drying and limited field access for machinery.
- ✚ A 25% tariff on US imports from Canada has helped Argentina expand to Canada due to higher production and low prices.
- ✚ Due to high input cost and low market prices the production of peanuts in Argentina for the upcoming season is expected to be low. Argentina peanut chamber has estimated 18.37% reduction in seed retention for upcoming season.

BRAZIL

- ✚ China opens five new markets for Brazilian agricultural products and advances sanitary and phytosanitary cooperation which includes peanut meal. This provides huge opportunity to Brazil given that in 2024 China had imported USD 18 Million worth of Peanut meal.

INDIA

- ✚ A new regulation regarding aflatoxin controls is delaying Indian peanut shipments to Indonesia. 35% of India's peanuts were exported to Indonesia in 2024.
- ✚ Peanut exports to Indonesia have slowed significantly due to delays in obtaining export and lab certificates, with many labs de-listed. This has tightened supply in the Indonesian market, keeping prices high, while the Indian market continues to soften amid limited export activity.
- ✚ Gujarat is experiencing higher rainfall with a 28-day rolling average of 1.03 mm this increased precipitation may benefit soil moisture levels but also raises concerns about potential waterlogging in certain areas. The arrivals for summer crop from Gujarat are expected to enter the market at end of May.

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>
Uttar Pradesh	2061.5	47.32	0.0%
Gujarat	1910.71	52.07	1.6%
Andhra Pradesh	1131.85	54.30	-6.2%
Maharashtra	1072.68	53.51	-3.4%
Rajasthan	717.13	48.48	-0.4%

Madhya Pradesh	689.85	45.89	-1.2%
Telangana	163.88	56.36	3.5%
Karnataka	157	48.23	1.0%
Tamil Nadu	47.81	65.55	1.4%
Chhattisgarh	1	45.00	-21.2%
Grand Total	7953.41	50.58	-0.4%

Source: Agmarknet.gov.in

Indian Export Trend

HS Code	Product Details	May 1 st – 6 th 2025	
		Quantity (In MT)	Unit Value (USD/Kg)
12023010	Ground-Nuts HPS of Seed Quality in Shell (Not Roasted or Cooked)	-	-
12023090	Other Ground-Nuts of Seed Quality	0.34	2.229
12024110	Other Ground-Nuts HPS Not of Seed Quality in Shell (Not Roasted or Cooked)	36.05	0.740
12024190	Other Groundnuts in Shell (Not Roasted or Cooked)	205.79	1.059
12024210	Shelled Groundnuts Kernel HPS	7324.81	1.074
12024220	Shelled Groundnuts Kernel, Others	106.00	1.162
12024290	Other Groundnuts	2.49	1.556
Grand Total		7675.48	1.096

Destination-wise Exports (May 1st – 6th 2025) (HS Code- 12024210)

Destination Country	Quantity (MT)	Unit Value (USD/Kg)	% Week-on-Week Change
VIETNAM	2179.92	1.061	-4.0%
INDONESIA	1718.20	0.994	2.1%
THAILAND	1026.00	1.228	3.0%
CHINA	563.00	0.857	-1.0%
MALAYSIA	317.98	1.011	-2.4%
BANGLADESH	255.00	0.751	-1.8%
UNITED ARAB EMIRATES	222.79	1.146	7.5%
NEPAL	215.00	0.993	-0.2%
OTHERS	826.93	1.357	-
Grand Total	7324.81	1.074	-1.5%

Indian Port-wise Exports (May 1st – 6th 2025)

Indian Ports	Quantity (MT)	Unit Value (USD/Kg)
MUNDRA	3738.80	0.993
12024190	66.16	1.038
12024210	3566.64	0.984
12024220	106.00	1.162
TONDIARPET ICD	1350.92	1.210
12024210	1350.92	1.210
PIPAVAV (VICTOR)	1231.00	0.960
12024210	1231.00	0.960
CHENNAI	627.20	1.231
12024190	1.10	2.431
12024210	624.10	1.195
12024290	2.00	0.695
OTHERS	727.56	1.530
Grand Total	7675.48	1.096

FOREX (Against USD)

Currency	7th April	14th April	WOW Change in %	Year to Date % Change
Argentine Peso: ARS	1145	1125.07	-1.74%	9.15%
Brazilian Real: BRL	5.75	5.62	-2.26%	-4.75%
Chinese Yuan Renminbi: CNY	7.23	7.21	-0.28%	-1.23%
Indian Rupee: INR	85.52	85.28	-0.28%	-0.59%
Mozambican Metical: MZN	63.9	63.91	0.02%	1.01%
Nigerian Naira: NGN	1607.72	1602.78	-0.31%	3.74%
Sudanese Pound: SDG	600.5	600.5	0.00%	0.42%
Tanzanian Shilling: TZS	2687.49	2695.5	0.30%	10.70%
Euro: EUR	0.88	0.89	1.14%	-8.25%
West African CFA Franc: XOF	580.54	575.5	-0.87%	-9.36%
Turkish Lira: TRY	36.63	38.77	5.84%	9.61%

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.

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