

*May 21, 2025*

Eventell Global Advisory Pvt Ltd

# GLOBAL Peanut weekly

Market Insights

Volume – 02: Issue 22



## SUMMARY

**China:** Peanut prices remain low as traders adopt a cautious stance, with delayed spring planting in Henan and Northeast regions potentially impacting the next harvest.

**USA:** Peanut planting is progressing steadily, but concerns of oversupply loom due to an 11% increase in acreage and higher prices driven by stable demand.

**Brazil:** Production is expected to reach a record 1.17 million tonnes in 2025, up 60% YoY, as exports rebound with strong growth from Mato Grosso do Sul.

**India:** Unseasonal rains are hurting crop quality in Maharashtra, while slow government stock releases and price hike expectations may support market buying.

## CHINA

- 🚩 The spot prices across major peanut producing regions remain low at around 8.00 – 8.20 CNY/Kg with merchants opting wait and see approach.
- 🚩 Inventory levels in remains manageable with no forced selling. Peanut stocks are expected to last till August 2025 with steady consumption, with high moisture materials will witness periodic sales pressure.
- 🚩 The new season spring planting is observed to be delayed particularly in Henan and Northeast China due to tough previous season. This may lead to late arrivals of new crops which generally comes around mid-august.

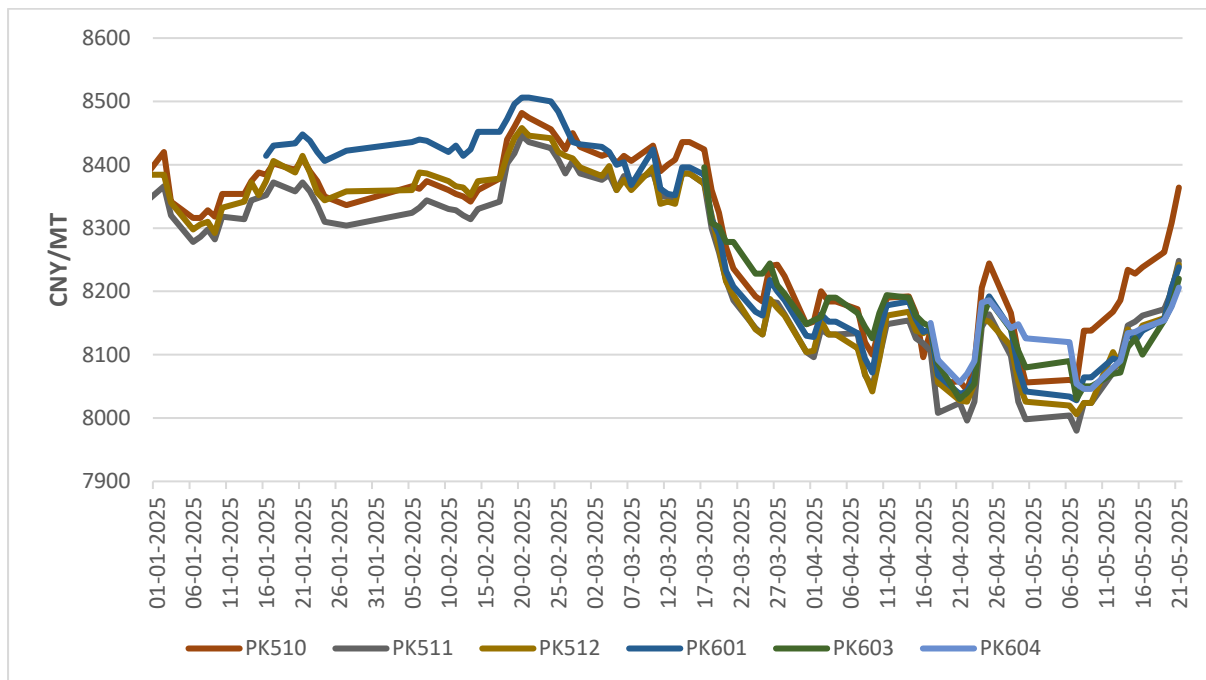
## CZCE Daily Trading Data (2025-05-21)

| Contract Month | Prev. Settle | Open  | High  | Low   | Close | Settlement | Change | Volume        | Open Interest   | OI Change    | Turnover       |
|----------------|--------------|-------|-------|-------|-------|------------|--------|---------------|-----------------|--------------|----------------|
| <b>PK510</b>   | 8,308        | 8,366 | 8,392 | 8,328 | 8,352 | 8,364      | 56     | 56,868        | 1,22,395        | 5,363        | 2378.10        |
| <b>PK511</b>   | 8,200        | 8,266 | 8,278 | 8,212 | 8,250 | 8,248      | 48     | 15,930        | 58,225          | 965          | 656.91         |
| <b>PK601</b>   | 8,206        | 8,238 | 8,262 | 8,210 | 8,240 | 8,238      | 32     | 338           | 2,659           | 16           | 13.92          |
| <b>Total</b>   |              |       |       |       |       |            |        | <b>73,261</b> | <b>1,84,059</b> | <b>6,375</b> | <b>3054.07</b> |

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   | 21st May | 14th May | % Change |
|------------|----------|----------|----------|
| Oct        | 8364     | 8234     | 1.58%    |
| Nov        | 8248     | 8146     | 1.25%    |
| Dec        | 8242     | 8140     | 1.25%    |
| Jan (2026) | 8238     | 8134     | 1.28%    |
| Mar (2026) | 8220     | 8112     | 1.33%    |

Price Unit: Yuan/Metric Ton

#### Year-on-Year

| Contract | 90th trading day<br>(21st May 2025) | 90th trading day<br>(21st May 2024) | % Change |
|----------|-------------------------------------|-------------------------------------|----------|
| Oct      | 8364                                | 9168                                | -8.77%   |
| Nov      | 8248                                | 8986                                | -6.92%   |
| December | 8242                                | 8988                                | -8.23%   |
| January  | 8238                                | 9016                                | -8.58%   |
| March    | 8220                                | 8996                                | -8.43%   |

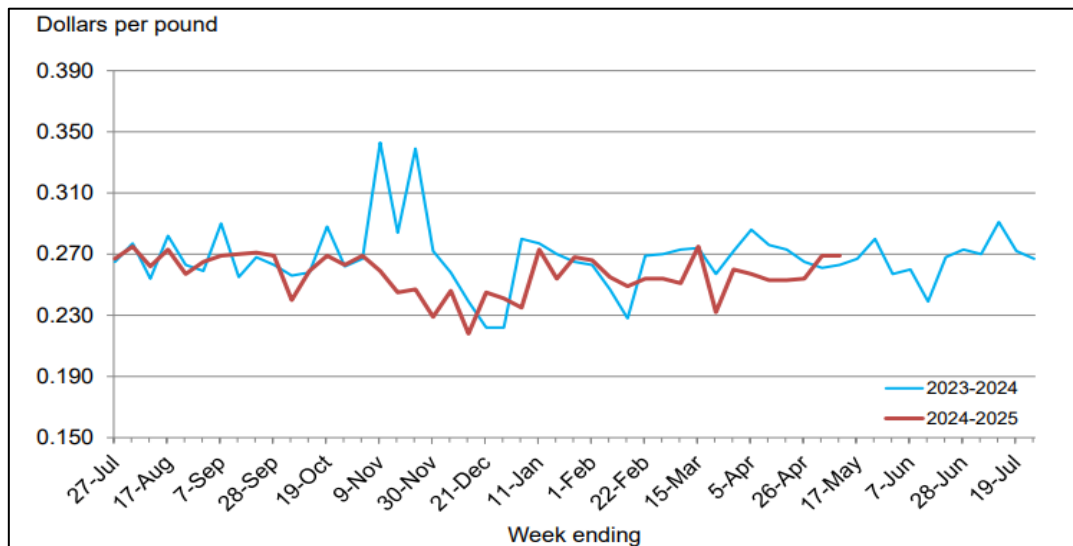
Price Unit: Yuan/Metric Ton



## USA

- U.S. wholesale peanut prices rose to \$0.59/kg, marking a 7.27% weekly and 1.72% annual increase, supported by stable demand and strong returns from irrigated peanut cultivation.
- A projected 11% rise in 2025 planting to 1.95 million acres, driven by lower profitability in competing crops, raises oversupply concerns, which could pressure prices in the second half of 2025.
- U.S. peanut planting is progressing at a normal pace with 51% planting completed, on par with last year's pace of 52%, and 5-year average of 50%, with around half the planting Georgia (produces around 50% of US peanuts) completed.
- Peanut prices farmers stock (May 10 week ending) – 26.9 cents per pound, unchanged from the previous week. Quantity purchased from farmers (May 3 week ending) totalled 130.0 million pounds, down 13.0 million pounds (Week on Week).

### All Peanut Prices – United States (Source: USDA)



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

| Item and type                  | Week ending         |                     |                     |                     |                     |
|--------------------------------|---------------------|---------------------|---------------------|---------------------|---------------------|
|                                | April 12, 2025      | April 19, 2025      | April 26, 2025      | May 3, 2025         | May 10, 2025        |
|                                | (dollars per pound) | (dollars per pound) | (dollars per pound) | (dollars per pound) | (dollars per pound) |
| <b>Average price</b>           |                     |                     |                     |                     |                     |
| Runner .....                   | 0.251               | 0.248               | 0.254               | 0.250               | 0.256               |
| Spanish .....                  | (X)                 | (X)                 | (X)                 | 0.627               | (X)                 |
| Valencia .....                 | (X)                 | (X)                 | (X)                 | (X)                 | (X)                 |
| Virginia .....                 | 0.274               | 0.272               | (X)                 | 0.272               | 0.292               |
| All .....                      | 0.253               | 0.253               | 0.254               | 0.269               | 0.269               |
|                                | (1,000 pounds)      | (1,000 pounds)      | (1,000 pounds)      | (1,000 pounds)      | (1,000 pounds)      |
| <b>Marketings <sup>1</sup></b> |                     |                     |                     |                     |                     |
| Runner .....                   | 114,401             | 88,047              | 113,702             | 119,368             | 83,901              |
| Spanish .....                  | -                   | -                   | -                   | 6,031               | -                   |
| Valencia .....                 | -                   | -                   | -                   | -                   | -                   |
| Virginia .....                 | 14,081              | 22,963              | -                   | 17,265              | 45,782              |
| All .....                      | 128,482             | 111,010             | 113,702             | 142,664             | 129,683             |

- Represents zero.

(X) Not applicable

<sup>1</sup> Quantity purchased from farmers

## BRAZIL

- ✚ Brazil's peanut production is set to hit 1.17 million tonnes in 2025, up 60% YoY and double 2020 levels, driven by major expansion in Mato Grosso do Sul, where output is set to rise 154% to 180,000 tonnes.
- ✚ Mato Grosso do Sul has become Brazil's second-largest producer, rising from near-zero output in 2019 to 70,500 tonnes in 2024, aided by crop diversification and suitability to sandy soils.
- ✚ Peanut exports rose 10% YoY to 73,000 tonnes (Jan-Apr 2025), with Brazil on track for a record year, rebounding from last season's drought-hit decline.

## INDIA

- ✚ Unseasonal rains are causing damage in several districts of Maharashtra where groundnut harvesting season is in its full swing. The quality of groundnut has been affected with pods turning black after being soaked.
- ✚ The government has been slowly selling its stock, and about 150,000 metric tons have already been sold. With expectation of higher prices going to be set by the government in the next round of sales, it could push market prices up. This may lead traders to buy more peanuts from farmers.

### Indian Prices and Arrivals Data (15<sup>th</sup> – 20<sup>th</sup> May)

| States             | Arrivals (MT)   | Unit Value (INR/Kg) | % Change (Week-on-week) |
|--------------------|-----------------|---------------------|-------------------------|
| Gujarat            | 6690.39         | 52.4                | 0.6%                    |
| Uttar Pradesh      | 2084.7          | 50.7                | 6.0%                    |
| Maharashtra        | 1166.3          | 52.8                | -1.5%                   |
| Rajasthan          | 957.31          | 48.5                | -0.1%                   |
| Andhra Pradesh     | 951.4           | 54.9                | 1.5%                    |
| Madhya Pradesh     | 781.68          | 49.2                | 4.8%                    |
| Telangana          | 132.15          | 54.8                | -2.2%                   |
| Karnataka          | 95              | 46.5                | -2.7%                   |
| Tamil Nadu         | 47.3            | 65.7                | 0.1%                    |
| Chhattisgarh       | 11.9            | 41.4                | -3.6%                   |
| Odisha             | 0.1             | 77.0                | -                       |
| <b>Grand Total</b> | <b>12918.23</b> | <b>51.9</b>         | <b>2.1%</b>             |

Source: Agmarknet.gov.in

**Indian Export Trend**

| HS Code            | Product Details  | May 7 <sup>th</sup> – 14 <sup>th</sup> 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  | 15.00                                       | 1.049               |
| 12024110           | Other Ground-Nuts HPS Not of Seed Quality in Shell (Not Roasted or Cooked) | 47.00                                       | 0.840               |
| 12024190           | Other Groundnuts in Shell (Not Roasted or Cooked)                          | 259.72                                      | 0.869               |
| 12024210           | Shelled Groundnuts Kernel HPS  | 10825.29                                    | 1.063               |
| 12024220           | Shelled Groundnuts Kernel, Others  | 109.26                                      | 1.764               |
| 12024290           | Other Groundnuts   | 48.19                                       | 1.726               |
| <b>Grand Total</b> |  | <b>11304.46</b>                             | <b>1.077</b>        |

**Destination-wise Exports (May 7<sup>th</sup> – 14<sup>th</sup> 2025) (HS Code- 12024210)**

| Destination Country  | Quantity (MT) | Unit Value (USD/Kg) | % Week-on-Week Change |
|----------------------|---------------|---------------------|-----------------------|
| INDONESIA            | 3279.60       | 1.011               | 1.66%                 |
| CHINA                | 1505.00       | 0.900               | 5.01%                 |
| THAILAND             | 1487.75       | 1.177               | -4.12%                |
| VIETNAM              | 1288.88       | 1.029               | -2.97%                |
| PHILIPPINES          | 1058.68       | 1.059               | 13.11%                |
| MALAYSIA             | 753.02        | 1.007               | -0.40%                |
| RUSSIA               | 214.00        | 1.008               | 16.11%                |
| NEPAL                | 185.76        | 1.021               | 2.78%                 |
| UNITED ARAB EMIRATES | 152.40        | 1.050               | -8.41%                |
| UKRAINE              | 150.00        | 1.000               | -                     |
| OTHERS               | 750.203       | 1.553               | -                     |
| Grand Total          | 10825.29      | 1.063               | -1.03%                |

**Indian Port-wise Exports (May 7<sup>th</sup> – 14<sup>th</sup> 2025)**

| Indian Ports       | Quantity (MT)   | Unit Value (USD/Kg) |
|--------------------|-----------------|---------------------|
| MUNDRA             | 4196.95         | 1.024               |
| 12024110           | 47.00           | 0.840               |
| 12024210           | 4042.22         | 1.026               |
| 12024220           | 107.73          | 1.137               |
| PIPAVAV (VICTOR)   | 3154.82         | 0.971               |
| 12024210           | 3154.82         | 0.971               |
| TONDIARPET ICD     | 1303.00         | 1.184               |
| 12024210           | 1303.00         | 1.184               |
| CHENNAI            | 814.74          | 1.192               |
| 12024210           | 813.04          | 1.147               |
| 12024220           | 1.50            | 2.333               |
| 12024290           | 0.20            | 1.057               |
| Others             | 1834.95         | 1.257               |
| <b>Grand Total</b> | <b>11304.46</b> | <b>1.077</b>        |

**FOREX (Against USD)**

| Currency                    | 14th April | 21st April | WOW Change in % | Year to Date % Change |
|-----------------------------|------------|------------|-----------------|-----------------------|
| Argentine Peso: ARS         | 1125.07    | 1142.94    | 1.59%           | 10.88%                |
| Brazilian Real: BRL         | 5.62       | 5.69       | 1.25%           | -3.56%                |
| Chinese Yuan Renminbi: CNY  | 7.21       | 7.22       | 0.14%           | -1.10%                |
| Indian Rupee: INR           | 85.28      | 85.56      | 0.33%           | -0.27%                |
| Mozambican Metical: MZN     | 63.91      | 63.9       | -0.02%          | 1.00%                 |
| Nigerian Naira: NGN         | 1602.78    | 1595.68    | -0.44%          | 3.28%                 |
| Sudanese Pound: SDG         | 600.5      | 600.5      | 0.00%           | 0.42%                 |
| Tanzanian Shilling: TZS     | 2695.5     | 2697.5     | 0.07%           | 10.78%                |
| Euro: EUR                   | 0.89       | 0.88       | -1.12%          | -9.28%                |
| West African CFA Franc: XOF | 575.5      | 580.65     | 0.89%           | -8.55%                |
| Turkish Lira: TRY           | 38.77      | 38.83      | 0.15%           | 9.78%                 |

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 till date.

## **Contact us**

Analyst – *Nikshep Anthony*, to provide feedback & suggestions, write to [consulting@eventellglobal.com](mailto:consulting@eventellglobal.com) or contact at +91 9513333926.

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