

Black Sea Logistics and Weather Stress Reshape Grain and Livestock Planning

Global Agricultural Developments

2026-07-24

Black Sea Logistics and Weather Stress Reshape Grain and Livestock Planning

By Global Agricultural Developments • July 24, 2026

Grains are supported by Black Sea logistics risk, weather stress in the U.S. and Europe, and firm demand, while Brazil confronts floods, livestock-export constraints, and volatile planting prospects. The report also examines measurable soil, livestock, feed, and weed-management innovations with practical implementation priorities.

Market Movers

- **Grains were firm to higher on July 23.** December corn traded at **\$4.88/bu**, up 3.25¢; November soybeans were **\$12.43¼/bu**, up 4.25¢; and September Chicago wheat was **\$7.06/bu**. Kansas City and spring-wheat contracts were modestly lower in the early session. [1]
- **Black Sea logistics remain the central wheat risk.** Russia has limited movements at Novorossiysk—its largest grain-export port, handling up to one-third of Russian shipments—to midnight through 5 a.m. because of drone threats; daytime operations were reported as continuing. At the same time, shipowners temporarily suspended arrivals at Ukraine’s Black Sea ports after Russian attacks, while Odessa represents about 90% of Ukraine’s grain-export capacity. Russia and Ukraine together account for roughly 30% of global wheat exports. [1]
- **Weather risk is broadening beyond the Black Sea.** The western U.S. Corn Belt is forecast to receive only 5–6% of normal rainfall over the next seven days, with North Dakota, South Dakota, Nebraska, Minnesota, and Iowa projected to run materially above normal temperatures. [1] In Europe, grain output is expected to fall more than 9% year over year after

heat waves hurt wheat yields and put EU corn output on course for a 19-year low; Paris wheat futures were up about 20% for the month. [1]

- **Demand and processing remain supportive for U.S. row crops.** Export sales for the week ending July 16 included **27.6 million bushels of new-crop corn, 56.5 million bushels of new-crop soybeans, and 10.7 million bushels of wheat.** [2] Private exporters also reported a **126,000-metric-ton** soybean sale for 2026/27 delivery to unknown destinations. [3] U.S. ethanol production rose 5.2% week over week to **1.09 million barrels per day**, with reported Corn Belt margins of **10–35¢** positive. [1]
- **Coffee is moving in the opposite direction.** USDA forecasts record global coffee production of **189.7 million bags** in 2026/27; a strong Brazilian recovery has been associated with a **25%** decline in coffee prices over the past seven months. [4]

Innovation Spotlight

Soil amendments lifted eucalyptus growth in a one-year field trial — Paraguay

A lowland eucalyptus trial compared limestone, gypsum, and fertilizer treatments with untreated controls. The treatment program applied **500 kg/ha** of fertilizer—equivalent to **1.5 kg per plant**—split between planting and six months later. After one year, treated trees showed **37–43% greater growth** than the untreated control, alongside more abundant fine roots at depth. [5]

This is a site-specific result on alfisol soils, rather than a universal prescription. The practical lesson is to evaluate corrective amendments and fertilizer as a combined root-zone program, then compare treated strips against a local untreated control.

Weed-control pipeline gains funding — United Kingdom

Moa Technology raised **\$29.6 million** in Series C funding to advance weed-management products with novel modes of action. The company says it has identified more than **80 mechanisms** against herbicide-resistant weeds and is also developing biological “amplifier” molecules intended to improve existing herbicides while potentially reducing application rates. Funding is earmarked for commercialization of its three most advanced programs and further development of the amplifier platform. [6]

Lower-carbon beef: measurable pathways, with management trade-offs — Brazil

Embrapa research reports that shifting cattle from unsupplemented pasture through an intensified finishing system, combined with reducing slaughter age

from three to two years, can reduce the carbon footprint of the resulting beef by **up to 70%**. The cited tools include feedlot finishing, improved diets, and feed additives that alter digestion. [7] The proposed *carne baixo carbono* certification is built around intensified crop-livestock integration, pasture finishing, and feedlots; the earlier *carne carbono neutro* protocol relies on silvopastoral systems that include trees. [7]

Separate bromoform-feed-additive analysis found an average **47% methane-emissions reduction** at a mean dose of 28.3 mg/kg dry matter, but effectiveness varied with diet composition and cattle type. This makes ration design and validation central to implementation rather than treating dose as a standalone solution. [8]

Regional Developments

United States: heat-sensitive crop window

The North Dakota hard red spring wheat tour estimated southern yields at **46 bu/ac**, below last year's 50 bu/ac but slightly above the five-year average of 45.8. Northwest and north-central estimates averaged **48 bu/ac**, above both last year and the five-year average. [1] The near-term weather risk remains concentrated in the western Corn Belt and Northern Plains; spring-wheat commentary identifies the next **two to three weeks** as a critical heat-risk window. [9]

Brazil: export demand, flooding, and livestock market access

Brazil's grain-export association ANEC raised its July soybean-export forecast to **13.5 million tonnes**, which would be 13% above July 2025. [10] In contrast, severe rains in Rio Grande do Sul have displaced more than 1,000 people and damaged winter canola and wheat fields, with replanting expected in affected areas once damage can be assessed. [11]

Brazilian livestock exporters face two distinct market-access deadlines. The EU requires proof by **September 3** that livestock exports comply with its antimicrobial rules; failure could jeopardize a market worth nearly **\$2 billion annually**. [12] China has already reached **80%** of its 2026 Brazilian beef-import quota of 1.1 million tonnes, after which a 55% additional charge applies. [10] The United Kingdom, however, has said it will continue importing Brazilian chicken and pork. [10]

Europe and Black Sea: two sources of wheat tightness

USDA projections cited in market coverage put U.S. wheat production down **6.3%** year over year, while the EU is expected to account for 16.6% of global wheat production and remains the world's second-largest wheat exporter after Russia. [1] The combination of EU heat losses and uncertain Russian/Ukrainian

export flows is supporting wheat’s risk premium, although port restrictions and vessel movements remain fluid.

Best Practices

Grains: prioritize field-level verification during weather stress

- **Scout heat- and drought-exposed corn and soybeans before relying on national averages.** Conditions in the western Corn Belt are materially different from broader crop-condition readings; pollination, rainfall distribution, and heat duration should be checked field by field. [1, 13]
- **Treat tar spot as a scouting and timing decision.** In West Elgin, Ontario, tar spot was still described as low but easier to find, with VT/R1 fungicide applications underway and further R3 applications planned. [14]
- **Act early on common speedwell.** Agronomy guidance identifies fall control as preferable to trying to recover from this winter annual later in the season. [15]

Livestock: reduce handling loss and use traceable performance data

A high-throughput cattle operation in Paraguay uses curved corral layouts based on Temple Grandin principles to limit stress and panic. Its managers estimate that poor finishing-yard handling can cost **10–15 kg per animal** in lost weight. [16]

For implementation, combine low-stress facility design with electronic identification and a single shared record system. The reported system follows animals from birth weight, dam, breed, and earlier nutrition through veterinary treatments and finishing diets, providing data for subsequent breeding and management decisions. [16]

Dairy and feed management: localize the ration

The RationSmart initiative is building mobile ration formulation around local feed libraries, tropical-animal requirements, and near-infrared spectroscopy to rapidly assess ingredient nutrient profiles. It is being developed across 12 partner countries, including India, Ethiopia, Southeast Asia, Morocco, and Bangladesh. [17] For farms considering similar systems, the required sequence is clear: establish local feed analyses, define animal requirements, then optimize rations from ingredients actually available.

Input Markets

- **Swine feed costs in Brazil have been stable, but feed remains the dominant cost.** Corn has held around **R\$60–70 per sack** and soybean meal has shown little change over the past 24 months. Feed

represents more than **70–75%** of swine-production cost, while some imported veterinary, mineral, vitamin, and amino-acid products have seen transport-related volatility linked to Middle East shipping disruption. [18]

- **Independent Brazilian hog producers are facing price pressure despite export growth.** Live-hog prices were reported **R\$3–4/kg below** the comparable period last year for independent producers, while exports grew 25% in the first half of 2026. The cited cause is oversupply from higher production, slaughter weights, and herd size—not rising feed costs. [18]
- **Ethanol policy remains an infrastructure issue in the U.S.** Senator Chuck Grassley argued that permanent E15 legislation is needed because retailers are unlikely to invest in distribution infrastructure if access depends on annual waivers. [19]
- **Brazil has expanded trade-disruption financing.** The third phase of Brasil Soberano provides more than **R\$18 billion**—R\$13 billion from the Treasury and R\$5 billion from BNDES—for working capital, capital goods, investment, technology, and market development. Agriculture, livestock, aquaculture, cooperatives, and associations are included among eligible sectors. [20]

Forward Outlook

1. **The next two weeks of U.S. weather are pivotal.** Persistent heat and low rainfall in the western Corn Belt, plus a two-to-three-week spring-wheat heat-risk window, will remain key determinants of yield expectations and grain-market volatility. [1, 9]
2. **Monitor Black Sea shipping details, not just headlines.** Novorossiysk has retained daytime operations, while Ukrainian port arrivals have paused. Vessel flows, port hours, and security conditions can alter the wheat outlook quickly. [1]
3. **Plan Brazilian spring planting cautiously in the Northeast and Minas Gerais.** Forecast commentary anticipates delayed and irregular rains, intense September–October heat, and potential **20–30-day** planting delays for soybeans and corn in western Bahia and other central-northern areas. A brief early rain followed by a 10–15-day dry spell is identified as a replanting risk. [21]
4. **Prepare for continued southern Brazil weather disruption.** Rio Grande do Sul soils are saturated, and another **100–150 mm** of rain was forecast for the following weekend, with further flood, hail, and wind risk. [22]
5. **Track regulatory deadlines alongside physical markets.** Brazil’s September 3 EU antimicrobial-compliance deadline and China’s remaining

beef-quota capacity could affect livestock-export economics independently of domestic supply and feed costs. [12, 10]

Sources

1. Wheat Prices SURGE on Black Sea Disruptions - Corn/Soybeans Hit Fresh Highs
2. X post by @ArlanFF101
3. X post by @USDAForeignAg
4. X post by @irfandonat
5. Interesantes resultados de fertilización de eucaliptos en campos bajos
6. r/AgriTech post by u/abhaymishr0
7. Inovação que pode cortar em até 70% a pegada de carbono da carne | Planeta Campo - ep.9 parte 4
8. Bromoform Based Feed Strategies: Evidence & Application in Animal Agriculture
9. Markets Now Closes 7/23 Soybeans Hit Contract Highs on China, Wx and Corn Follows: Cattle Correct
10. EUA anunciam nova tarifa contra trabalho forçado e miram o Brasil | RN - 23/07/2026
11. Governo anuncia crédito de R\$ 18,5 bilhões para empresas afetadas pelo tarifaço | M&C – 23/07/2026
12. Brasil corre contra o tempo para adequar pecuária às exigências da União Europeia
13. Markets Now Early 7/23 Soybeans Hit New Highs, Corn Up on Wx: Cattle Finally Bounce
14. X post by @AlbertTenuta
15. X post by @AgPhDMedia
16. Corral ganadero “de Película” para manejo con bienestar animal
17. Animal Health & Productivity, and Methane Mitigation Pathways
18. Presidente da Acsurs analisa cenários, custos e oportunidades na suinocultura brasileira
19. ICYMI: Sen Chuck Grassley joins AgriTalk 072226
20. Governo libera R\$ 18 bilhões no Brasil Soberano para conter tarifas dos EUA
21. Clima Campo: acompanhe a previsão do tempo
22. Frente fria muda o tempo e mantém alerta para temporais no país