China Soybean Buying Returns as Brazil Faces Planting Delays and Trade Deadlines

Global Agricultural Developments

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# China Soybean Buying Returns as Brazil Faces Planting Delays and Trade Deadlines

*By Global Agricultural Developments • June 18, 2026*

A likely China-led soybean purchase supported U.S. grain sentiment while Brazil's soybean oil, planting weather, beef trade, and logistics outlook all shifted. The brief also highlights practical guidance on late-season fertility, swine water, and strip-till economics.

## Market Movers

- **United States / China — soybeans:** USDA reported **372,000 MT** of soybean sales to unknown destinations, including **312,000 MT** for **2026/27**. Market commentary said the size and timing point to China as the most likely buyer, though destination is not yet officially declared. Analysts also said U.S. new-crop soybeans are now competitive with Brazil, which should support more sales if demand continues. Some commentary tied the buying to concern over Brazil's next growing season rather than only politics or trade optics. [1, 2, 3]
- **United States — corn and wheat:** Rumors of Chinese inquiries for U.S. corn and wheat helped sentiment, but no purchases were confirmed. The rebound also looked technical: Farm Journal cited corn RSI near **26%**, while Market Minute said December corn came within **2 cents** of contract lows, held **$4.40** support for almost two years, and bounced **14 cents** from Monday's lows after a **70-cent** slide. [3, 4, 5]

  If corn is going to bounce, this would be a good spot to see it happen. [4]
- **Brazil / global energy — soybean oil:** Brazil's soybean oil export prices are outperforming the rest of the soy complex. Average oil values

from January through early June were **$1,170/t**, up **11%** year over year, and the first 10 days of June averaged **$1,324/t**, nearly **30%** above June 2025. The same source linked the move to war-driven energy demand. By comparison, soybean grain averaged **$410/t** (**+2%**) and meal **$360/t** (**+7%**). Brazil had already exported nearly **1 million tons** of oil for **$1.1 billion** in 2026. [6]

- **United States — ethanol demand:** Corn use for fuel ethanol is estimated at **4.288 billion bushels** so far this marketing year, up **22 million bushels** from last year but **47 million bushels** short of the pace needed to hit USDA's target. In the latest week, ethanol production slipped to **1.102 million barrels/day**, using an estimated **104.0 million bushels** of corn; stocks were unchanged at **24.5 million barrels**. [7, 8, 9, 10]

## Innovation Spotlight

- **Brazil — agave biostimulant for dryland bioenergy:** Unicamp researchers are testing a glutamate-based biostimulant to speed early agave development for semi-arid biofuel systems. In laboratory and controlled-growth tests, a **single application** increased plant growth by **170% in one year**. Field validation is still underway. The work is part of the **BRAVE** program, backed by **R$100 million** from Shell over **five years**, with research shared between Unicamp and SENAI Bahia. The target is biomass production in regions too dry for sugarcane or corn, with ethanol and biomethane as the main downstream fuels. [11]
- **United States — strip-till equipment tuned for emergence and savings:** An Arizona strip-till operator reported better uniform emergence in **twin-row corn** using a Soil Warrior Edge with wider containment cogs and a shank design better suited to that layout. The main economic payoff cited was **fertilizer savings**, with one **6-ton Montag** air cart used across rigs at **30-, 36-, and 38-inch** row spacings. When cover crop residue does not mix well on the first pass, the operator uses a second pass with coulters, while wavy coulters are used to improve soil texture and blending. [12]
- **Brazil — beef genetics:** Nelore-based crossbreeding continues to be used as a climate adaptation tool. One cited commercial example used a **5/8 Simmental × 3/8 Nellore** composite to combine meat quality and larger cuts with thermoregulation, parasite resistance, and better use of lower-quality tropical forage. [13]

## Regional Developments

- **United States — Midwest and Northern Plains:** Weather remains uneven across the U.S. grain belt. Forecasts call for heavy rainfall in parts of **Missouri, Illinois, Kentucky, Iowa, and Indiana**, with localized flooding already affecting some bottom ground. Iowa crop ratings were said to have fallen **5 points week over week** in the eastern part of the state because of excess rain. In the Northern Plains, late, cold, wet conditions are reinforcing expectations for fewer corn and spring wheat acres and more shift toward later crops or soybeans. [14, 2]

- **Brazil — 2026/27 soybean setup:** Forecasters continue to warn that heat waves and irregular spring rains could delay reliable planting moisture in **Mato Grosso, Goiás, and the broader Center-West/Southeast** until **late October or early November**. Current guidance is to avoid chasing the first rains, because planting too early raises replant risk. At the same time, the **South** is expected to benefit from more rain and better productivity, while **Matopiba** and the **North/Northeast** face reduced rainfall, higher temperatures, and lower yield potential. [15, 16]
- **Brazil / United States / European Union — beef trade:** Brazil may have a **3-5 year** export window because the U.S. beef cow herd fell to **27.6 million** breeding cows, the smallest since **1961**. But access to Europe remains a live policy issue. Lula and EU leaders created a commission to study the release of Brazilian meat by **September 3**, while Brazilian producers continue to argue that stricter EU antimicrobial rules should apply only to EU-bound cattle. In Mato Grosso, the sector says only **460** of **129,000** producers are fully inside **CISBOV** traceability. [13, 17, 18]
- **Brazil / South America — logistics:** The planned **3,300 km** bioceanic corridor could cut container transit from **Santos to Asia** from about **54 days** to **37 days**. The gain looks most relevant for higher-value products such as meats, cotton, beans, sesame, fish, cellulose, fruits, and honey. Bulk grains remain constrained by a **27-ton** truck limit through the Andes, so they are still expected to move mainly through Atlantic routes. Full operation is expected in **late 2027 to early 2028**. [19]

## Best Practices

- **Late-season fertility:** If crops look stressed, avoid spending on immobile nutrients that are unlikely to reach the plant quickly. Ag PhD's guidance was that **phosphorus** generally does not pay when sidedressed or foliar-fed, while sidedress **potassium** makes the most sense only in sandy, high-rain environments. For late rescue, prioritize more mobile nutrients such as **nitrate, sulfate, and boron**, and keep foliar applications small because plant uptake is limited. [20]
- **Soil nitrogen budgeting:** Check **soil organic matter** before buying more nitrogen. Ag PhD highlighted it as one of the cheapest nitrogen sources already present on the farm. [21]
- **Brazilian soybean planting discipline:** In the Center-West, use **Au-**

**gust** forecast updates to refine seeding plans, but current guidance favors **late October to early November** once rains stabilize. Planting too soon after the sanitary vazio ends was explicitly flagged as a high replant risk if heat returns before moisture firms up. [15]

- **Swine water management:** Treat water as a monitored production input. Lactating sows may drink **25-40 liters/day**; ideal water temperature was cited at **15-22°C**; and drinker flow should exceed **3 L/min** for sows and around **2 L/min** for finishing pigs. Monthly checks plus an annual full analysis for **pH, coliforms, iron, manganese, nitrates, sulfates, and other minerals** were recommended. [13]
- **Cattle health routines:** Brazilian veterinarians cautioned producers not to relax herd-health routines after changes linked to foot-and-mouth disease vaccination status. The recommendation was to keep a full sanitary calendar, including infectious disease and parasite prevention, and to seek technical support rather than cut preventive management. [22]

## Input Markets

- **Feed grains — United States:** One analyst described corn as effectively back on sale for feed buyers, with funds net short and prices at lows not seen in about **two years**. [2]
- **Nitrogen — United States:** Fertilizer costs may still show up in acreage despite recent price relief. Market commentary said corn acreage decisions were made when fertilizer was expensive, even though **Gulf urea** has since fallen back to **pre-war levels**. That leaves open the possibility that fast planting will not translate into the usual increase in corn area. [3]
- **Potash vs. phosphate — North America:** Canada supplies about **80%** of U.S. potash, and commentary described potash as relatively affordable compared with phosphate. [14]
- **Credit and barter — Brazil:** Input access remains tied to finance. Brazilian soybean producers are preparing for 2026/27 under high debt, tight credit, high input costs, and pressured prices. In **Goiás**, about **20%** of the next crop has already been sold via barter to secure inputs, although that pace is still below normal for this time of year. [16]

## Forward Outlook

- **Watch the June 30 acreage report:** Market participants are already framing the end-of-month USDA acreage report as a major event. Current private commentary points to possible reductions in **corn** and **spring wheat** acres in the Northern Plains, potential gains in **soybean** area, and uncertainty about whether high fertilizer costs changed corn decisions despite fast planting. [23, 2, 14, 3]

- **Watch China's soybean appetite:** If U.S. beans stay competitive with Brazil, analysts expect more new-crop soybean sales. The unresolved question is scale — whether China buys closer to **25 million metric tons** or something nearer last year's **12 million metric tons**. Separate market commentary also said broader commercial participation would likely need the extra **10%** tariffs to come down. [3, 2]
- **Watch weather-driven field risk:** In the U.S. Corn Belt, excess rainfall keeps the market focused on localized flooding and possible nitrogen loss. In Brazil, frost, off-season rain, and later El Niño heat are already complicating coffee, sugarcane, and safrinha harvest work while setting the next soybean planting window. [14, 24, 25]
- **Watch Brazilian financing and trade deadlines:** With the Chamber agenda unlocked, **PL 5122/2023** can advance, and the government is also considering a provisional measure aimed at drought-hit producers before **Plano Safra**. On beef, the new Brazil-EU commission sets up **September 3** as the next date to watch for market access. [18, 26, 17]

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