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Pro Farmer's second night found lower corn and soybean direction in Indiana and Nebraska even as Brazil reported a record safrinha crop. This brief weighs the competing supply, demand, weather and input signals and turns them into operational checks.

Market Movers

United States — day two turns the crop-tour rally into a finishability test

Pro Farmer's second-night samples were lower in both Indiana and Nebraska: Indiana corn averaged **183.54 bu./acre**, down **5.3% year over year** and **2.07% below** the three-year tour average; Indiana soybean pod counts were **1,318.64 per 3-by-3-foot area**, down **4.21%**. Nebraska corn averaged **163.61 bu./acre**, down **8.85% year over year** and **5.6% below** its three-year average, while soybean pods fell **9.54%** to **1,219.62**. [1]

The important signal is the direction relative to USDA, not a direct comparison of absolute yields. USDA had Indiana corn rising from 204 bu./acre in 2025 to 206 this year and Indiana soybeans up 4.2%, while the tour found both moving lower; Nebraska's ear count was down **5.22%** and grain length **4.61%**, with scouts calling the ear count the lowest since 2013. [1] The tour is directional rather than a replacement for the survey: the market commentary notes roughly 285 tour fields per state versus more than 14,000 USDA responses. [2]

Damage is uneven and the crop is not yet finished. Scouts expect some Indiana river-bottom fields to be total losses across thousands of acres; elsewhere, the crop is immature, with up to 14 inches of recent rain, fields reported about 40%

underwater, white mold emerging and small soybean pods that may struggle to fill. Drier weather could still preserve yield potential, but continued saturated roots and disease would reduce grain fill and test weight. [1]

United States — demand is carrying the weather premium

At 5:24 a.m. Central on Tuesday, December corn was **$4.925/bu.**, November soybeans **$12.245**, September Chicago wheat **$6.79** and September Kansas City wheat **$7.645**. The prior session's move was led by soybeans, up nearly **24¢** to $12.16, while December corn gained roughly **6¢** to near $4.90; the cited drivers were Corn Belt rainfall, a strong NOPA crush, low soybean-oil stocks, higher crude and renewed Chinese buying. [2]

The soybean demand base is unusually firm but not risk-free. NOPA members crushed **216.65 million bushels** in July, a monthly record and **11% above** a year earlier; soybean-oil stocks fell to **1.36 billion pounds**, down **9.4%** from June. Cash crush margins were reported near $4/bu. across much of the Midwest, with domestic crush projected at **61%** of U.S. soybean demand versus **36.5%** exports. Private exporters also reported a fresh **136,000-metric-ton** sale for delivery to China in marketing year 2026/27. [2, 3]

Wheat is receiving support from a logistical risk rather than an established disappearance of supply: market analysts say Black Sea ports and infrastructure are being hit and product cannot move, but the underlying supply remains available if the disruption is resolved. A current report says at least five grain ships were attacked near Russia's Novorossiysk and Tuapse ports, with Moscow struggling to maintain exports. [4, 5]

Innovation Spotlight

India — a drought and fertilizer-shortage package comes with large vendor claims

An India-focused vendor podcast proposes an **8-kg** planting-bed kit—**5 kg mycorrhizal manure, 2 kg NPK and 1 kg zinc**—mixed with roughly half a trolley of cow dung, neem manure or vermicompost. Its companion biodegradable leaf film is presented as a way to retain nighttime dew on foliage. The quoted cost is below **3,000** for the kit plus about **550 per spray**; two or three sprays put the claimed total near **4,500**. [6]

The same speaker says the kit raised survival from 70 to 95 plants per 100 seeds, implying a claimed **25–35%** yield lift, and presents a roughly 5,000 spend as the basis for the benefit. A urea-coating product is claimed to cut urea use by at least **50%** using 250 ml per 50-kg bag plus 1 kg of bio-coat, at about **500 per bag**, while retaining an initial 15–20% nitrogen release. These are vendor-presented results rather than an independent, crop-specific trial; validate nutrient equivalence, labels and local field performance before budgeting the claimed return. [6]

United States — strip till is being sold as a flexible system

The National Strip Tillage Conference reported that **57%** of attendees were first-timers; the organizers described interest as extremely high and said calls had been busy for 18 months. The new Kinsey–Yeter Falcon targets 20- and 22-inch rows with a three-section, high-speed frame, hydraulic downforce, liquid-fertilizer and seed capacity, and hydraulic weight transfer. [7]

The practical message is to design the system around the farm rather than copy a machine or depth: the speakers define strip till as zonal residue management and controlled seedbed preparation, with cover crops fitting the system. One specialist reduced fall strip till after seeing erosion persist and because weather is harder to predict. The conference supplies an adoption and equipment signal, not a quantified yield or ROI result. [7]

Brazil — integrated poultry expansion is a technically gated R$2-million investment

SEARA's integration model starts with an on-farm review of topography, power, water, location, producer profile and financing; the integrator supplies a standard construction plan, inspects the completed aviary and runs a pre-placement "setup" test before providing technical assistance through the flock. The interview puts the average cost of one aviary at about **R$2 million**. Profitability is volume-driven: one family moved from a one-aviary plan to three to spread costs and increase throughput, but the source provides no independent return benchmark. [8]

Regional Developments

Brazil — record safrinha supply meets cautious forward selling

Mato Grosso's second-crop corn harvest is more than **99.9% complete** across more than **7.434 million hectares**. The state institute reports record productivity of **128.67 sacks/ha**, about **1%** above the prior cycle, and expected production near **57.4 million tonnes**, roughly **2 million tonnes** higher than last season. By July, **64.9%** of expected production had been sold, but only **10.62%** of the 2027 crop was forward-sold versus a five-year average of **12.85%**. [9]

The broadcast's local cash board showed soybeans at **R$144/sack in Passo Fundo, R$141 in Cascavel and R$136 in Rondonópolis and Dourados**; corn was **R$69 in São Paulo, R$62 in Paraná, R$52 in Mato Grosso and R$70 in Passo Fundo**, with port corn at R$68.50 in Santos and R$68 in Paranaguá. ANEC's director said high war-linked input costs, debt and ordinary-to-low selling prices could make producer profitability the weakest in 20 years. [10]

Brazil — winter grain and fieldwork face sharply different weather regimes

Brazil's wheat area is reported to be the smallest since 2017, with USDA estimating imports of **7.5 million tonnes** between October 2026 and September 2027. At the same time, a cold front is bringing heavy rain, hail and wind gusts above **90 km/h** to Rio Grande do Sul, while the Center-West remains hot and dry: Mato Grosso is forecast near **38°C** after Cuiabá exceeded 40°C, followed by a polar-air outbreak that could leave Dourados at a maximum of **23°C** on Friday. [9]

United States — land finance is becoming a parallel farm-risk signal

A current report says Midwest farmland values fell **3.7% after inflation**, the largest annual decline since 2016, as farm-credit conditions weakened. That does not determine crop prices, but it raises the importance of preserving liquidity when crop margins and borrowing conditions are moving in opposite directions. [11]

Best Practices

Grains — make late soybean herbicide decisions by cutoff and crop stage

Ag PhD's timing gate is specific: dicamba, Liberty and Enlist One are already past their legal cutoffs at first flower or earlier; Roundup is limited until first pods appear; clethodim can be used for grass control up to 60 days before harvest; and Cobra is listed at 45 days pre-harvest, although it burns soybean foliage and is not a routine late spray. Confirm the product label, local restrictions and harvest interval before acting; the source frames Cobra as a last-resort option for a weedy field, not a normal rescue pass. [12]

Dairy — use dry matter and clamp behavior as feed-quality controls

On a UK dairy farm, first-cut silage tested at **19.6% dry matter**, **14.8% protein**, pH **3.7**, slightly high ash, intake potential **82.8** and low sugars. The clamp had slipped because the grass was still alive and so wet that water could be wrung from the sample; the farmer's corrective lesson was to wilt longer before clamping. A quick-crush system then made the second day of filling faster, but the farm still sampled the forage rather than relying on appearance. [13]

Soil and pasture — treat organic matter as a local water-buffer observation

The same farm attributed green grass through a dry spell to heavy manure applications, higher organic matter and greater moisture-holding capacity; a neighboring reinstated field with poorer soil organic matter had little grass.

This is an operator observation, not a quantified yield trial, but it supports checking soil organic matter and moisture retention before assuming heat alone explains pasture failure. [13]

Brazil — reduce wildfire exposure before the alert peaks

For São Paulo farms under the “quadruple 30” condition—temperature above 30°C, humidity below 30%, more than 30 days without rain and wind above 30 km/h—the recommended controls are to mow dry vegetation at property boundaries and roads, keep firebreaks clean, monitor critical areas and review the emergency plan. Agricultural burning requires authorization and may be suspended; producers can register for civil-defense alerts by SMS to **40199** and report fires to 193 or 199. [9]

Input Markets

United States — phosphate relief is temporary and unlikely to restore normal pricing

Moroccan phosphate has returned to the U.S. market for the first time in five years, with about **54,000 metric tonnes** of triple superphosphate arriving at New Orleans after temporary countervailing-duty relief. The cited market analyst expects fall phosphate demand to drop at least **50%** because of high input costs and weak grain prices, yet tight global supply may prevent a comparable price decline. The relief currently runs only through **February 2027**; a Texas A&M estimate put the 2021–25 duty burden on U.S. row-crop producers at roughly **$6.9 billion**. [2]

Brazil — fertilizer security remains an import-exposure problem

Brazil’s proposed PROFERT program would require at least **2% domestic product** in imported fertilizer, while the sector’s political advocates say the country still depends on imports for more than **80%** of its fertilizer needs. The same discussion points to the delayed environmental licensing of the Autazes potash project as a constraint on expanding domestic supply. This is a policy direction, not yet a delivered cost reduction for growers. [10]

Turkey — fertilizer credit stress is an early warning, not yet a supply estimate

Turkey’s Fertilizer Producers, Importers and Exporters Association warned that bankruptcies and court-approved debt restructurings have begun to appear on a large scale in the fertilizer sector. The report gives no company count, capacity loss or price impact, so it should be monitored as a financial-health signal rather than translated into a quantified shortage. [14]

Forward Outlook

- **Watch whether the East can finish:** the next tour route runs from Bloomington, Illinois, toward Iowa City, while the western leg goes from Nebraska City toward Spencer, Iowa. Day-three forecasts call for more storms across the mid-Mississippi and Ohio valleys, with damaging winds and locally heavy rain possible from south-central Missouri into southwest Indiana. [1]
- **Separate moisture rescue from moisture damage:** Indiana scouts say the crop could still benefit if drainage and drier weather arrive, but continued saturated roots, fungal pressure and delayed maturity would prevent the smaller ear and grain-size readings from being recovered through late fill. [1]
- **Test demand follow-through:** the 136,000-tonne China sale is constructive, but soybean prices still depend on whether Chinese buying broadens beyond isolated bookings and whether domestic crush remains at its exceptional pace. [3, 2]
- **Plan Brazil's next crop around liquidity, not just output:** the current safrinha is a record-sized supply story, while 2027 forward sales are below their five-year norm and producer representatives describe debt and low margins as the binding constraint. [9, 10]
- **Use the corn technical level as a risk-management marker, not a forecast:** one market note flags bearish RSI divergence near the July highs and identifies **$4.70–$4.75/bu.** as the next support zone if a pullback develops. [15]

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