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This brief covers the oil-led move in soy, corn, wheat, and cattle; the farm technologies showing measurable savings or output gains; and the weather, logistics, and input-cost pressures reshaping 2026 decisions in the U.S. and Brazil. It also lays out practical agronomy, feed, biosecurity, and insurance actions for the weeks ahead.

Market Movers

- **United States / global grains:** Chicago soybeans were at **$12.23/bu** on March 13 after reaching a **21-month high** this week; corn was **$4.67/bu** and wheat **$6.13/bu** [1, 2]. The move was driven by Iran-related crude volatility, leaked EPA biomass-based diesel RVO numbers around **5.4-5.61 billion gallons**, strong soybean crush margins near **$2/bu**, and China's tighter phytosanitary requirements that led Cargill to pause some Brazil-to-China soybean shipments [3]. Brazil's soybean crop is still described at roughly **180 million tons**, so the rally is running against large global supply [3].
- **United States / wheat:** Wheat's Friday strength was tied to technical buying, funds reducing shorts, higher energy prices, and weather risk around cold and dry conditions; new-crop Minneapolis spring wheat was discussed around **$6.75** [4]. Separate market commentary noted wheat futures are up **18%** since the start of the year [5].
- **United States / cattle:** Cash live steers averaged **$234.77/cwt**, down about **$5** week over week, while April live cattle futures were **$230.85/cwt** and choice boxed beef rose to **$397.25/cwt**, up **$10.84** on the week [6]. Markets are also tracking a possible strike at JBS Greeley,

Colorado, a **5,400-5,500 head/day** plant, although multiple sources said cattle are already being redirected to other plants and spare capacity exists because national cattle numbers are tight [7, 8].

- **Global sugar and veg oils:** Oil above **$100** has made ethanol production more attractive and pushed raw sugar to a **one-month high** [9]. Palm oil has also extended gains on tighter supply expectations in **Indonesia** and **Malaysia** plus biofuel demand support [10].

Innovation Spotlight

- **United States / precise starter fertilizer:** After moving to Exact Shot placement on corn with 10-34-0 plus zinc, one grower said he saw major fertilizer savings with no yield drag and possibly **1-2 bushels** better yield [11]. He plans to test higher-value blends with nitrogen, sulfur, and micronutrients on-seed in 2026, while also reducing refill frequency [11].
- **United States / spot spraying:** One See & Spray user reported roughly **96% chemical savings** on a first field and said the weed-density maps exposed repeat-pressure zones that were more predictable than expected [12]. The main operational lessons were nozzle selection and trusting the machine; users also linked reduced whole-field chemistry to less crop stress and potential yield benefit, though they presented that as an observed or ongoing area rather than a finalized result [12].
- **Brazil / DDGS feed inclusion:** In Brazilian confinement systems, **2 kg of DDGS** can replace **1 kg soybean meal + 0.5 kg corn + 0.5 kg of other ingredients**, and reported soybean-meal replacement is running from **one-third to 50%** with strong results [13]. High-energy diets with strong DDGS inclusion were associated with about **1.18-1.2 kg of carcass gain per day**, shorter adaptation periods, and fewer diet and trip changes in the feedyard [13].
- **Brazil / drought adaptation in soy:** In Rio Grande do Sul, exhibitors highlighted biologicals and botanical extracts that they said can help plants stay photosynthetically active through roughly **15-20 days** of heat and drought stress [14]. A drought-tolerant soybean cultivar reached **86 sacks/ha** in Cachoeira do Sul, described as nearly double the state average [14].
- **United States / water reuse:** A California winery uses worm beds to treat wastewater from vat cleaning and harvest wash water, cutting biological oxygen demand and producing water described as about **97% clean** for immediate irrigation reuse. The system handles roughly **10,000-12,000 gallons/day** during harvest [15].

Regional Developments

- **U.S. Northern Plains / Corn Belt:** Fertilizer prices were reported up more than **70%** in the last **90 days**, and early USDA projections pointed to nearly **5 million fewer corn acres** and **4 million more soybean acres** nationally [16]. Even so, seed sales and farmer comments in **North Dakota, South Dakota, and Minnesota** still suggest strong corn intent where profitability and yield potential remain favorable [16]. The swing factor is supply timing: about **10-15%** of northern farmers still had not secured spring fertilizer, making soybean or edible-bean switches more likely if product does not arrive [16].
- **Brazil / Mato Grosso soy and safrinha corn:** Excess rain in the far north and extreme north continues to slow harvest and compress the safrinha window. In Marcelândia, rainfall has already topped **2,200 mm** and may reach **3,000 mm** versus a typical **1,800-2,000 mm**; local soybean losses were estimated from **10%** to **32%**, with grain moisture at **28-30%** and safrinha corn planting delayed beyond the ideal window [17]. At the state level, Mato Grosso's second-crop corn planting was **93.68%** complete, below last year's pace, and ProSoja MT said planting was more than **20 days** behind the ideal window in some areas [18].
- **Brazil / national soybean flow:** National soybean harvest was reported at **50.6%** complete, versus **60.9%** a year earlier. Mato Grosso remained the fastest major state at **89.1%**, followed by **Mato Grosso do Sul 61%**, **Goiás 57%**, **Tocantins 52%**, and **Paraná 46%** [19].
- **Brazil / Rio Grande do Sul:** Rio Grande do Sul is headed for a **sixth consecutive harvest with losses**; current estimates point to a **7%** drop in total grain output and an **11%** drop in soybeans [14].
- **U.S. beef processing:** JBS Greeley stopped taking new cattle ahead of a likely strike, but industry sources said the current low cattle inventory leaves some surplus processing capacity elsewhere, reducing the chance of a national bottleneck unless the disruption lasts [8, 6].

Best Practices

- **Grains / weed control:** Start clean with either burndown or tillage, then pair that with a pre-emerge or early pre-plant residual designed to last into **June**. Time the post-emerge pass for the roughly **5% escapes** before the residual is fully gone, and use multiple modes of action on every pass to slow resistance [20, 21].
- **Soil and water / risk reduction:** No-till or direct planting improves soil and water conservation because surface residue reduces rain impact and evaporation, while weed pressure is often lower than in conventional tillage [18]. In Brazil, Embrapa's ZARC tool is being updated to account not only for soil texture but also for structure and management; in Paraná,

soybean insurance subsidies under PSR ran from **20%** to **35%** depending on management level, explicitly rewarding practices that improve infiltration and water storage [19].

- **Beef and dairy feed / DDGS:** Where ration formulation and logistics allow, DDGS can replace a meaningful share of soybean meal while also improving feedyard operations by reducing the number of diets and trips [13]. The same source cited benefits beyond beef, including better milk-solids performance in dairy cows and better carcass yield in pigs [13].
- **Swine biosecurity:** Producers looking to tighten disease control already have a toolkit to deploy: the **AgView** traceability database, the **Secure Pork Supply Plan**, certified sample-collector training, and the **U.S. Swine Health Improvement Plan** for traceability, biosecurity, and surveillance [22]. The strategic emphasis is on standardized outbreak investigations, better information sharing, and more consistent measurement of real-world biosecurity practices [22].
- **Dairy barn workflow:** One dairy operator said automated feed pushing and avoiding tractor traffic through the feed area kept feed cleaner and feet cleaner, suggesting a practical management gain from separating feeding routines from heavier equipment movement where barn layout allows [23].

Input Markets

- **Fertilizer / global exposure:** Countries around the Persian Gulf account for roughly **half of world urea exports** and about **30%** of ammonia exports, while the U.S. imported **25 million metric tons** of fertilizer last year and moved about **2 million metric tons** through the Strait of Hormuz [7]. Farmers were reported paying **tens of thousands of dollars more** for remaining spring tons, and some retailers said they were receiving updated price sheets multiple times per day instead of once or twice a month [7].
- **Fertilizer / on-farm cost impact:** In U.S. reporting, some phosphorus prices had doubled, nitrogen was up about **15%** year over year, and fertilizer inflation was adding roughly **$40-50/acre** to corn in some areas [20]. In Brazil, StoneX-referenced commentary said port prices for **urea** were up more than **15%** and **ammonium nitrate** about **28%** after the Middle East escalation [19].
- **Fuel / diesel:** U.S. diesel was reported up about **$1/gal** over several days with another **30-50 cents** possible before global supplies adjust [7]. In Brazil, an IBPT study covering **93,000** invoices showed March 1-8 distributor prices up **8.91%** for additive S10 diesel and **8.70%** for common S10, with gains above **13%** in the Northeast; Petrobras also announced a further **R$0.38/liter** refinery increase, partly offset by the federal move to zero PIS/Cofins on imported diesel [24].

- **Feed / DDGS:** DDGS continues to gain attention as a feed-cost and formulation lever in Brazil because it can displace both soybean meal and corn while also improving traceability demanded by export partners such as China [13].
- **Agricultural chemicals / herbicides:** New corn and soybean herbicide programs are emphasizing longer residual windows and easier tank mixing. **Resicore Rev** was presented with **three modes of action**, up to **eight weeks** of residual control on about **75** tough weeds and grasses, and compatibility with fertilizer mixes including sulfur [20]. In soybeans, **Kyber Pro** was described as a pre-plant to early post-plant option with **six-plus weeks** of residual, while **Sonic Boom** was highlighted for waterhemp control and better crop safety from its co-crystal formulation [20].
- **Crop protection / disease pressure:** Soybean disease losses reached **216.5 million bushels** in 2025, or **4.8%** of potential production, led by soybean cyst nematode, sudden death syndrome, and a sharp rise in red crown rot [21]. That backdrop is also supporting interest in Bacillus-based biofungicides that Brazilian researchers said can reduce disease incidence and, in some field trials, were associated with yield gains [18].

Forward Outlook

- **United States / spring decisions:** Weather remains the acreage swing factor. Analysts said an open winter and low snow cover could bring an early spring, which would favor more corn, while delays would push more acres to soybeans [16]. A separate outlook warned that a repeating **45-day** cold pattern could bring another cold shot in **late April or early May**, raising risk for more advanced wheat and newly emerged corn [25]. Early March moisture improved parts of the Midwest, but **Nebraska** and **Texas** remain under notable drought stress going into corn planting [26].
- **United States / risk-management window:** The **March 16** signup deadline for 2026 spring-seeded crop insurance is unusually meaningful because last year's program changes raised **SCO** and **ECO** subsidies to **80%**, extended beginning-farmer support to **10 years** on a **15% to 10%** declining extra subsidy, and made **ARC + SCO** combinations possible [27]. For dryland producers from **South Dakota to Texas and east to Georgia**, the new **CLIP** product is also being compared with SCO because it works off the grower's own bushels rather than a county trigger [27].
- **Brazil / climate planning:** Canal Rural and NOAA-linked updates put the chance of **El Niño** returning between **June and August 2026** at **62%**, after a neutral phase through **March-May** [28]. Near term, that neutral period should help second-crop corn with more regular rain in central Brazil and a return of moisture to the South [28]. For the 2026/27 season, the watch points are heavier rain and potential flooding in the

South, stronger heat in the Southeast that could hurt coffee flowering, and below-average rain in the North and Northeast that could tighten Matopiba water availability and northern logistics [28, 29].

- **Marketing discipline:** Current advisory language remains scale-up rather than all-in. One framework highlighted **$11.63** and **$12.50** in new-crop soybeans and roughly **$4.91-$5.17** in corn as zones for incremental sales or hedges, while cattle analysts were also urging producers not to ignore current price levels despite a still-bullish longer-term supply picture [3, 6].

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