# Soybeans led by China and biofuels timing as wheat slips on rain; Brazil weather and trade updates

Global Agricultural Developments

2026-02-26

## Soybeans led by China and biofuels timing as wheat slips on rain; Brazil weather and trade updates

*By Global Agricultural Developments • February 26, 2026*

Soybeans stayed headline-driven on China and biofuels timing, while wheat eased on improved rain expectations. This brief also highlights Brazil's weather disruptions and trade negotiations, plus practical ROI signals from precision agronomy and new equipment upgrades for planting and harvest.

### 1) Market Movers

**Grains & oilseeds (U.S. + Brazil)**

- **U.S. futures (Feb 25)**: May corn **$4.39 3/4** [1], May soybeans **$11.58 1/2** [2], May Chicago wheat **$5.70 3/4** [3], May KC wheat **563 3/4** [4], May spring wheat **595 1/2** [5].
- **Soybeans** were described as making **new highs** on optimism around **China** and **biofuels** [6]. Key demand/price narratives included:
    - A **March 31** China trade-deal milestone (framed as the day President Trump goes to China) [7].

[1] US vs. Brazil Soybean Production Cost Explained
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- EPA biofuels program “final guidelines” expected to go to **OMB** soon; timing discussed as **up to 90 days** (with an expectation closer to ~**3 weeks, +/-**) [8].
- U.S. soybeans landed in China were cited as **$1.30–$1.40/bu more expensive** than Brazilian soybeans (depending on PNW vs Gulf) [9].


*Markets Now Closes - 2/25 What Drove Grain and Livestock Mostly Higher Wednesday (0:52)*

- **China purchase rumor watch (soybeans):** market talk referenced beans “looking around” for purchases out of the **PNW**, but one segment said there was **no confirmation yet** [10][11]. Another cited China cash sources at ~**12 MMT**, with “no hard evidence” of an **8 MMT** commitment yet [12].

- **Farmer selling/ownership as a driver (soybeans):** one analysis emphasized **minimal U.S. farmer ownership** of old-crop soybeans (many sold early), which can amplify old-crop price behavior [13]. Another seg-

[8] Markets Now Closes - 2/25 What Drove Grain and Livestock Mostly Higher Wednesday
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[13] US vs. Brazil Soybean Production Cost Explained

ment similarly said farmers sold many beans last fall and that inventory is now in "strong hands" (commercials) [14].

- **Energy/biofuels linkage (soybeans/soyoil):** crude oil was cited up ~**15%** over the last month, alongside soybean oil strength and aggressive managed-money buying—paired with a warning that fund-driven rallies can be vulnerable to a fast drop ("wash out") [15]. Separately, one source flagged **pending RVO headlines** in the "next couple weeks," described as likely **positive** and supportive for prices [16].
- **Wheat pulled back** on weather and profit-taking themes:
  - A markets segment described wheat down for a **fourth day**, with "weather looking better" and "good rains expected" in dry Plains areas [17].
  - Another segment described HRW futures having recently peaked at **590 3/4** before dropping back into the **560s** [18]. Kansas—cited as the largest winter wheat producing state at **22%**—was forecast **dry** for the next 7 days, with some rain in the **8–15 day** window and temperatures running **well above normal** (5–10, even 20°F above normal in places) [19][20].
  - Successful Farming also cited wheat lower overnight on rain in the **eastern Midwest** [21].

**Livestock & dairy**

- **Cattle:** one markets segment said cattle strength was driven by **box beef and cash**, but futures struggled to clear February highs [22]. Another framed the market as demand-driven while also noting beef supplies were ~**8–10% higher y/y** due to **record imports** and updated data on **record carcass weights** [23].
- **Hogs:** described as rallying with support from **protein demand**, improved fund buying after liquidation, production tracking USDA's quarterly hogs & pigs report, and **exports performing well** [24].
- **Milk:** deferred months moving above **$18** were attributed to expectations

[14] Markets Now Early - 2/25 Soybeans Start Lower Awaiting China Biz: Corn, Cattle & Milk Rally
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[24] Markets Now Closes - 2/25 What Drove Grain and Livestock Mostly Higher Wednesday

of **limited heifer availability** and the importance of calf revenue to producers; global dairy trade auctions were described as positive for **four consecutive sessions** [25]. A separate segment advised producers to "get orders in" so spikes can be sold into without hesitation [26].

### FX & Brazilian cash-market implications

- Brazil's **USD/BRL** was reported at **R$5.12** (lowest since 2024), with commentary that a weaker dollar can **pressure soybean pricing** during harvest marketing despite Chicago strength [27][28].
- Example cash quotes from the same Brazil-focused update:
  - Soybeans (Rio Grande do Sul): **R$121/sack** (down R$1) [29]
  - Corn (Mato Grosso): **R$53/sack** [30]
  - Boi gordo: MT **R$333.57/@**, SP **R$350.27/@**, PA **R$320.81/@** [31]
- **Orange juice exports:** shipments were described as rebounding, with January volume for concentrated orange juice **>50k tons**, **+55% y/y**, attributed to renewed EU demand (EU cited as the main destination) [32].

### Export/program demand signal (U.S.)

- USDA's Foreign Agricultural Service reported procurement of **43,260 MT** of U.S. **hard red winter wheat** plus ocean freight for Food for Progress in Nigeria (**$11M** commodity + **$2M** shipping) [33].

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[25] Markets Now Early - 2/25 Soybeans Start Lower Awaiting China Biz: Corn, Cattle & Milk Rally

[26] Markets Now Early - 2/25 Soybeans Start Lower Awaiting China Biz: Corn, Cattle & Milk Rally

[27] Dólar cai e atinge o menor nível desde 2024; entenda impactos no agro | Rural Notícias - 25/02/2026

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[33] post by @USDAForeignAg

## 2) Innovation Spotlight

### Proven ROI signals (precision agronomy)

- **Fungicide timing via weather/disease forecasting (Saskatchewan, ~1,200 acres):** a producer reported reducing fungicide applications from **3→2** in year 1 (and **2→2** in year 2), saving **one application across ~700 acres of wheat** in year 1 with **no meaningful yield change** [34].
- **Variable-rate application:** the same producer said it's "just starting," with ROI still an open question for operations **under 2,000 acres** despite field-variability logic [35].

### Equipment & in-field automation

- **John Deere combines (model year 2027):** Deere is updating **2027 X9 and S7** combines with **predictive/automated technologies** intended to harvest across dynamic crop conditions while minimizing operator intervention [36]. (Source link: https://www.agriculture.com/john-deere-updates-2027-x9-and-s7-combines-with-more-harvest-automation-11911215?taid=699e8ff0f718110001864c71&utm_campaign=trueanthem&utm_medium=social&utm_so [37])
- **John Deere planters (2027):** planter advancements were summarized as improvements in **fertilizer application**, **furrow depth precision**, residue management, uptime, and logistics [38]. (Source link: https://www.agriculture.com/john-deere-adds-dual-fertilizer-system-furrowvision-for-2027-planters-11911197?taid=699f0072a1bbf00001b97e73&utm_campaign=trueanthem& [39])
- **Strip-till nutrient logistics:** Environmental Tillage Systems launched a combined **liquid + dry fertilizer** system for the **SoilWarrior 4500** to apply both in a **single pass** [40].

### Crop protection trait roadmap

- **Syngenta DuraStack (2027 season):** promoted as a **triple Bt protein stack** with **three modes of action** for corn rootworm control [41]. Rootworm losses were cited as "up to **$1B/year**" [42].

[34] r/homestead post by u/brainfy_ai
[35] r/homestead post by u/brainfy_ai
[36] post by @SuccessfulFarm
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[39] post by @SuccessfulFarm
[40] post by @SuccessfulFarm
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[42] Markets Now Early - 2/25 Soybeans Start Lower Awaiting China Biz: Corn, Cattle & Milk Rally

**Digital tools and training ecosystems**

- **AIonYourFarm.com (cohort 2):** enrollment opened for a program teaching farmers to build AI tools (e.g., **CustomGPT**, an app in **Bolt**, and connected tools), with weekly **pre-recorded tutorials**, live **Q&A/office hours**, structured project homework, and community access [43][44][45][46][47].

**Regenerative + supply-chain innovations**

- **Agroforestry financing:** Propagate described as a software and financing platform designed to bridge the "economic gap" for integrating tree crops into row-crop and livestock operations [48].
- **Brazil (4,000 hectares):** Seven-Eleven Japan and Mitsui & Co. launched a regenerative partnership using **Brachiaria cover cropping** to improve water retention, generate organic fertilizer, and reduce synthetic herbicide use [49].
- **Regenerative beef scaling:** Applegate's beef hot dog portfolio transition to regenerative sources was framed as leading to nearly **11 million acres** converted to certified regenerative land by early 2025 [50]. Teton Waters Ranch planned a retail rollout of new grass-fed refrigerated meatballs and certified regenerative ground beef via retailers including Whole Foods and Sprouts [51].

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## 3) Regional Developments

**Brazil: weather-driven operational risk + crop progress**

- **Center-north harvest delays:** heavy rains were described as continuing to disrupt fieldwork in northern Goiás, Querência (MT), Tocantins, southern Maranhão, and southern Piauí [52]. One report cited producers losing soybeans in fields (including "burnt" soybeans) amid harvesting difficulty [53].

[43] post by @NickHorob
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[46] post by @NickHorob
[47] post by @NickHorob
[48] #104 - FARM BILL, 7/11, DOG, SCIENCE
[49] #104 - FARM BILL, 7/11, DOG, SCIENCE
[50] #104 - FARM BILL, 7/11, DOG, SCIENCE
[51] #104 - FARM BILL, 7/11, DOG, SCIENCE
[52] As águas de março vão fechar o verão?
[53] As águas de março vão fechar o verão?

- **South: heat/dry stress and timing:** Rio Grande do Sul was described as facing **hot, dry** conditions for **10–12 days**, with only ~**15–20 mm** expected around **Mar 7–8**, and more meaningful rains discussed from **around Mar 12** onward [54]. Another segment described the next **10 days** as relatively "tranquil" for the South while rain concentrates in Brazil's center-north [55].
- **ENSO framing:** one meteorology segment said La Niña is dissipating toward **neutrality** heading into autumn/winter, with a signal for **El Niño returning** around mid-winter/early spring; it stressed uncertainty about intensity and duration [56].


*As águas de março vão fechar o verão? (3:22)*

- **Rice harvest (Conab):** harvest progress was described as ~**6% behind** last year; Rio Grande do Sul (largest producer) at ~**1%**, Santa Catarina at **23%**, and Goiás at **64%** harvested [57].

### Brazil: supply, processing, and commercialization snapshots

- **Tocantins soy:** producers described expanding soybean area by ~**10%** by converting degraded pasture, with planting challenges due to irregular

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[55] Chuva forte continua nos próximos dias em algumas regiões do país
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early-season rains and irrigated yields ~**10% below** last year attributed to heat; marketing was cited at ~**50–60% sold** [58][59][60][61].

- **Grain/biofuel scaling (Brazil):** one forum segment cited Brazil grain production **>350M tons** [62], soybean production ~**179M tons** with a possible RS cut of **1.5–2.0M tons** [63], and corn production **143M tons**, with nearly **30M tons of corn** projected for ethanol in 2026 (up from "zero" in 2017) [64].
- **Biofuels' pricing linkage:** the same forum discussion argued biofuels are now "fundamental" to pricing for soy/corn, and "will be" for wheat in Rio Grande do Sul with a new plant coming online [65]. A new Rio Grande do Sul facility was described as the **first in Brazil** to produce ethanol from cereals such as **wheat and triticale**, and also as a pioneer in **vital gluten** production domestically [66].

### Trade lanes and market access (South America)

- **Mercosur–EU:** the agreement was described as eliminating tariffs for Brazilian exports including **meats, sugar, ethanol, orange juice, coffee, and cellulose** [67]. Argentina's Chamber of Deputies approved the agreement **203–42** [68], with discussion that Senate approval and provisional EU application could allow earlier implementation [69]. EU safeguard provisions were described as allowing investigation/action if imports of "sensitive" products rise more than **5% (3-year average)** [70].
- **Brazil–South Korea:** Korea was said to be sending a technical mission in **Sep 2026** for **grape** exporters; **15** Brazilian chicken plants were under review with an expected response by **mid-March**; egg export certification was under evaluation; Brazil requested pork expansion beyond Santa Catarina; and Brazil again requested a beef audit (no date defined) [71].

[58] Dólar cai e atinge o menor nível desde 2024; entenda impactos no agro | Rural Notícias - 25/02/2026
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[71] AO VIVO: Número de mortos aumenta em Juiz de Fora (MG), e as chuvas não param | M&C – 25/02/2026

**Phytosanitary policy (Brazil cocoa)**

- Brazil temporarily suspended cocoa imports from **Ivory Coast** due to phytosanitary risk (including *Phytophthora megakarya* and swollen shoot virus variants, plus concern about unknown pests and potential triangulation) [72]. CNA described the suspension as fundamental for protecting domestic production [73]. A market view said the suspension affects future shipments while in-transit cargo enters, and **no major short-term price variation** was expected due to supply already internalized/in transit and domestic production covering ~**80%** of demand [74][75].

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## 4) Best Practices

**Grain marketing & risk discipline**

- **Soybeans (rally management):** one market segment warned that fund-driven advances can reverse quickly and suggested producers "take action" (e.g., sell some beans) to reward rallies [76]. Another Brazil forum similarly recommended selling soybeans on price "repicks" [77].
- **Wheat (risk premium awareness):** one segment framed wheat pullbacks as profit-taking/sell stops while emphasizing that weather premium may remain; it also noted producer caution (e.g., Colorado/Nebraska) around forward selling amid drought concerns [78].

**Spray timing and input savings**

- **Forecast-informed fungicide timing:** a producer example showed skipping a low-pressure window and saving **one fungicide pass over ~700 wheat acres** with no meaningful yield change [79].

**Seed quality systems (soybeans)**

- A soybean seed production segment highlighted a lab process including physical purity checks and multiple germination/vigor tests (paper roll, accelerated aging, tetrazolium, sand germination), plus pre/post treat-

[72] Governo suspende importação de cacau da Costa do Marfim por risco fitossanitário
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[79] r/homestead post by u/brainfy_ai

ment checks and one-year sample archiving for traceability [80][81]. It also stated that well-analyzed seed supports uniformity, better establishment, and improved productivity/rentability per hectare [82].

### Grain facility safety (dust explosion prevention)

- A safety segment explained dust explosion risk as fine organic dust (e.g., corn, wheat, coffee, soybeans, rice) becoming airborne in confined spaces and finding ignition sources (hot surfaces, sparks, friction, motor/bearing overheating) [83]. It noted harvest-season pressure can lead to deferred maintenance and longer run hours, elevating risk [84].
- Mitigation tools cited included sensors for belt misalignment and bearing temperature plus vision systems, with emphasis that devices in classified areas require **Inmetro certification** for explosive dust atmospheres [85].

### Soil and nutrient management

- **No-till benefits (Brazil):** residues left on the surface were described as reducing rain impact on soil and reducing evaporation, improving water storage; the segment also said weed infestation can be lower than conventional systems [86].
- **Precision nutrient application (U.S. example):** a Virginia producer described using GPS and improved equipment to reduce poultry litter application rates to about **0.5 tons/acre** where needed, supported by nutrient management plans and annual soil samples [87].
- **Soil pH:** Successful Farming highlighted “Managing soil pH with lime” as a yield lever (link provided by the source) [88][89].

### Livestock production systems

- **Swine welfare/production (Brazil):** Seara reported completing a transition to **100% collective gestation** in integrated farms; it described

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[87] Farming the Countryside: How to Navigate Key Trends Impacting the Future of Agriculture
[88] post by @SuccessfulFarm
[89] post by @SuccessfulFarm

producer support via construction standards and training, and reported better female welfare and improved indicators versus the prior system (including fewer urinary infections and fewer abortion losses, with better productivity) [90][91].

- **Milk price risk management:** one dairy segment recommended placing protective orders ahead of spikes to reduce regret and capture opportunities in volatile markets [92].

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## 5) Input Markets

### Fertilizer trade policy (U.S.)

- One market segment said most U.S. fertilizer imports will remain exempt under President Trump's new tariff policy: all fertilizer products were described as excluded from a newly announced **10% import tariff**, except **ammonia, sulfur, and sulfuric acid**; those three were said to remain exempt if imported under **USMCA** [93]. Canada was cited as the majority supplier for sulfur and more than half of ammonia imports last year [94].

### Cost structure: U.S. vs Brazil soybeans

- A soybean cost comparison described fundamentally different structures: **Brazil** costs driven more by direct inputs like fertilizer, while the **U.S.** is more heavily burdened by overhead—especially land costs [95][96]. From 2020–2024, Brazilian soybean production costs were described as nearly **doubling** due to fertilizer price surges and currency depreciation [97]. U.S. costs were described as rising ~**13%** over the same period [98].

- Profitability was summarized as more consistent for Brazilian farms (Mato Grosso) and more volatile for U.S. farms (with losses cited in 2020 and 2024) [99][100].

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**Biofuels-linked demand for crops and fats**

- Biofuel policy headlines were repeatedly cited as supportive for soybeans/soybean oil (RVO expectations, EPA guidance timing) [101][102].
- A Brazil forum discussion said beef tallow (sebo bovino) rose from around **$50/ton** pre-biodiesel to about **$1,000/ton**, with value "passed through" the chain [103].

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## 6) Forward Outlook

**Key dates and decision windows (markets)**

- **Soybeans:** two potential market-moving items were framed as landing **after** the U.S. planting intentions survey:
    1) EPA biofuels guidelines expected at OMB soon, with a decision window discussed as up to **90 days** (but expected closer to ~**3 weeks, +/-**) [104].
    2) A **March 31** U.S.–China trade milestone, described as a key date for "trumpeting" a deal [105].
- **Price risk:** the same markets discussion cautioned that, because both factors may occur after the planting survey, it may take until the **June 30** survey to get a clearer feel for acreage outcomes [106].

**Weather watch (U.S. + Brazil)**

- **U.S. wheat:** near-term Plains rain expectations and shifting HRW dryness/rain forecasts remain central to wheat risk premium [107][108].
- **Brazil operations:** continued center-north rain disruptions vs. southern heat/dry stress (notably RS) remain key execution risks through early March, with timing of meaningful rains a focal point [109][110].
- **ENSO trend:** La Niña was described as dissipating toward neutrality, with an El Niño return signal later in the year; intensity uncertainty was emphasized [111].

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**Policy & trade monitoring**

- **Mercosur–EU ratification pace** (and safeguard thresholds) remains a headline variable for sensitive ag products [112][113].
- **Brazil–South Korea market openings** (grapes, poultry plants, eggs, pork expansion) have concrete milestones into **mid-March** and **Sep 2026** [114].

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