

# Tariff uncertainty meets Brazil’s value-added soy surge, with new Deere power and traceable coffee push

Global Agricultural Developments

2026-02-25

## Tariff uncertainty meets Brazil’s value-added soy surge, with new Deere power and traceable coffee push

*By Global Agricultural Developments • February 25, 2026*

Tariff uncertainty and China demand signals kept grain markets headline-driven, while Brazil’s soybean complex exports showed a clear shift toward meal and oil. This issue also highlights new Deere high-horsepower tractors, Brazil’s coffee traceability platform, on-farm digital/AI workflows, and actionable best practices from silage management to laying-hen ranging systems.

### 1) Market Movers

#### Trade + policy headlines (U.S./global)

- **Tariff uncertainty** stayed central after President Trump threatened **higher tariffs** on countries that don’t honor trade agreements, with the EU pausing ratification and India deferring final trade talks; the uncertainty weighed on U.S. equities and pressured grain sentiment <sup>1</sup>.
- In one market discussion, **China’s effective tariff rate** was cited at **24%** (vs **32%** the prior week) <sup>2</sup>. The same segment said it’s **unlikely China buys old-crop U.S. soybeans**, and that any “goodwill” buying (mentioned as **~8 MMT**) would more likely be **new-crop** <sup>34</sup>.

---

<sup>1</sup>Trump Tariff Threat + Americans “Can’t Quit” Eating Expensive Beef

<sup>2</sup>Markets Now Early - 2/2 What Do the New Tariffs Mean for China Trade & the Ag Markets?

<sup>3</sup>Markets Now Early - 2/2 What Do the New Tariffs Mean for China Trade & the Ag Markets?

<sup>4</sup>Markets Now Early - 2/2 What Do the New Tariffs Mean for China Trade & the Ag Markets?

## Grain & oilseed price action (U.S. futures + export flow)

- **U.S. futures (Feb 24 morning):** May corn **unchanged at 4.40<sup>1</sup>/<sub>4</sub>**, May soybeans **down 2<sup>3</sup>/<sub>4</sub> at 11.47**, May Chicago wheat **up 1 at 574<sup>3</sup>/<sub>4</sub>**, May KC wheat **down 3<sup>3</sup>/<sub>4</sub> at 569**, May spring wheat **down 1<sup>1</sup>/<sub>2</sub> at 5.95<sup>3</sup>/<sub>4</sub>**<sup>56789</sup>.
- **Export inspections (week ending Feb 19):**
  - Corn: **79M bushels** inspected (+**33%** WoW; +**72%** YoY); marketing-year-to-date shipments +**46%** YoY; accumulated sales +**30%** <sup>10</sup>.
  - Soybeans: **25M bushels** (down **45%** WoW; down **24%** YoY) <sup>11</sup>.
  - Wheat: **20M bushels** (+**42%** WoW; +**37%** YoY) <sup>12</sup>.
  - USDA also reported a **flash sale of 5M bushels of corn to Colombia** <sup>13</sup>.
- **Corn exports vs. on-farm selling:** corn was described as running into heavy farmer selling ahead of **first notice day**, especially where basis/HTA positions are tied to March <sup>14</sup>.
- **Soybeans:** talk continued around potential **China buying off the PNW**, framed as either remaining purchases under a prior **12 MMT** commitment or part of an additional **8 MMT** <sup>1516</sup>. Another market comment emphasized that **Brazil's beans were about \$1+ below U.S. prices**, pulling demand toward Brazil <sup>17</sup>.
- **Soybean oil:** continued making **new contract highs** on biofuel/RVO expectations, but with caution about “buy the rumor, sell the fact” risk if the policy outcome disappoints <sup>18</sup>. Separately, another analyst noted **soybean oil stocks are high** and suggested the market may be **overpriced vs. fundamentals** <sup>19</sup>.

<sup>5</sup>Trump Tariff Threat + Americans “Can’t Quit” Eating Expensive Beef

<sup>6</sup>Trump Tariff Threat + Americans “Can’t Quit” Eating Expensive Beef

<sup>7</sup>Trump Tariff Threat + Americans “Can’t Quit” Eating Expensive Beef

<sup>8</sup>Trump Tariff Threat + Americans “Can’t Quit” Eating Expensive Beef

<sup>9</sup>Trump Tariff Threat + Americans “Can’t Quit” Eating Expensive Beef

<sup>10</sup>Trump Tariff Threat + Americans “Can’t Quit” Eating Expensive Beef

<sup>11</sup>Trump Tariff Threat + Americans “Can’t Quit” Eating Expensive Beef

<sup>12</sup>Trump Tariff Threat + Americans “Can’t Quit” Eating Expensive Beef

<sup>13</sup>Trump Tariff Threat + Americans “Can’t Quit” Eating Expensive Beef

<sup>14</sup>Markets Now Closes - 2/24 Soybeans Rally on Talk of China Buying: Corn Wheat End Weak

<sup>15</sup>Markets Now Closes - 2/24 Soybeans Rally on Talk of China Buying: Corn Wheat End Weak

<sup>16</sup>Markets Now Closes - 2/24 Soybeans Rally on Talk of China Buying: Corn Wheat End Weak

<sup>17</sup>Markets Now Closes - 2/24 Soybeans Rally on Talk of China Buying: Corn Wheat End Weak

<sup>18</sup>Markets Now Closes - 2/24 Soybeans Rally on Talk of China Buying: Corn Wheat End Weak

<sup>19</sup>Markets Now Early - 2/2 What Do the New Tariffs Mean for China Trade & the Ag Markets?

### Wheat: technical momentum vs. seasonal caution

- July HRW wheat was described as having a **big breakout** (trade up to **602**, best since July 2025), with a continued **dry forecast** for U.S. HRW areas (western/central Kansas, eastern Colorado) over the next two weeks <sup>20</sup>.
- MarketMinute flagged a **KC wheat sell signal / hedge alert**, citing a seasonal weak window and retracement into a common pause zone (**50%–61.8%** of June highs) after a breakout <sup>212223</sup>.

### Livestock: tight cattle supply, demand resilience

- In one cattle market outlook, **per-capita beef consumption** was cited at **~59 lbs** (largest since 2010) <sup>2425</sup>. Retail beef prices were cited around **\$9.50/lb** as a potential “flattening” point for demand <sup>26</sup>.
- Another market segment emphasized **tight cattle supply** and strong demand, with cash possibly pushing **above \$2.50** and choice boxes up **\$6+ midday** <sup>27</sup>.
- Hogs were described as up on **fund buying** (sixth day in that segment) <sup>28</sup>.

## 2) Innovation Spotlight

### High-horsepower row-crop tractors (U.S.)

- John Deere launched six new high-horsepower row-crop tractors: three **8R** and three **8RX** models rated **440/490/540 hp**, built around a new platform with a **JD14 (13.6L) engine**, **EVT-only** transmission, and features including up to **110 gpm hydraulics**, up to **60 km/h** road speed, and “electrical off-boarding” to run planter row units via a single power cord (reducing need for PTO/hydraulic generators) <sup>2930</sup>.
- Deere also highlighted a redesigned operator environment (“new operating experience”) with a second **convenience display**, adjustable armrest with saved presets, and other cab changes <sup>31</sup>.

---

<sup>20</sup>Trump Tariff Threat + Americans “Can’t Quit” Eating Expensive Beef

<sup>21</sup> post by @MarketMinuteLLC

<sup>22</sup> post by @MarketMinuteLLC

<sup>23</sup> post by @MarketMinuteLLC

<sup>24</sup>E17: 2026 Market Predictions with Patrick Linnell

<sup>25</sup>E17: 2026 Market Predictions with Patrick Linnell

<sup>26</sup>E17: 2026 Market Predictions with Patrick Linnell

<sup>27</sup>Markets Now Closes - 2/24 Soybeans Rally on Talk of China Buying: Corn Wheat End Weak

<sup>28</sup>Markets Now Closes - 2/24 Soybeans Rally on Talk of China Buying: Corn Wheat End Weak

<sup>29</sup>New John Deere 8R & 8RX 540 Tractors Explained: Specs, Features & Use Cases

<sup>30</sup>New John Deere 8R & 8RX 540 Tractors Explained: Specs, Features & Use Cases

<sup>31</sup>New John Deere 8R & 8RX 540 Tractors Explained: Specs, Features & Use Cases

### Crop protection traits: corn rootworm control (U.S.)

- Syngenta’s **DuraStack** trait technology was promoted as having **three modes of action** against corn rootworm, available for the **2027 season** <sup>32</sup>. Another DuraStack segment cited corn rootworm costs “up to **\$1B/year**” and positioned the product as a triple Bt protein stack for rootworm control <sup>33</sup>.

### Digital agriculture in practice (Brazil)

- BASF’s digital ag platform (Charvio) described a shift from intuition-based decisions toward **data-driven, precise management** using real-time monitoring (images/sensors/machinery/climate), variable-rate operations, and remote management tools <sup>34</sup>.
- A producer example reported **reduced herbicide use** via weed mapping and **returns in the first year** via variable-rate seeding that optimized seed and fertilizer use <sup>3536</sup>.
- Adoption constraints were described as a combination of **connectivity, ROI understanding, and training/capacity** to operate tools <sup>37</sup>.

### AI + farm data workflows (U.S.)

- One producer example described using Claude to extract data from **15 cattle loadout PDFs** (OCR/vision) and analyze performance by pen/date (including **average daily gain**) and generate an interactive mini web app view <sup>38</sup>.
- **Acre Almanac** was described as applying regression/multivariate analysis across planting/variety/timing/harvest data combined with soil and weather layers to identify yield-variation drivers <sup>39</sup>.
- A separate post highlighted Claude-generated **herbicide mix price analysis** as a practical input-cost use case <sup>40</sup>.

### Traceability + compliance: coffee sustainability (Brazil)

- Conab launched **Parque Cafeeiro**, a platform to certify Brazilian coffee as **deforestation-free**, using satellite monitoring/remote sensing and integration of official government databases (via **gov.br Conecta API**)

<sup>32</sup>Markets Now Closes - 2/24 Soybeans Rally on Talk of China Buying: Corn Wheat End Weak

<sup>33</sup>Markets Now Closes - 2/24 Soybeans Rally on Talk of China Buying: Corn Wheat End Weak

<sup>34</sup>Tecnologia digital promete mais rentabilidade e produtividade no campo

<sup>35</sup>Tecnologia digital promete mais rentabilidade e produtividade no campo

<sup>36</sup>Tecnologia digital promete mais rentabilidade e produtividade no campo

<sup>37</sup>Tecnologia digital promete mais rentabilidade e produtividade no campo

<sup>38</sup>447: Selling to John Deere and Building AI Tools in Agriculture

<sup>39</sup>447: Selling to John Deere and Building AI Tools in Agriculture

<sup>40</sup> post by @NickHorob

for near-real-time compliance checks (including deforestation and overlap checks) <sup>414243</sup>.

- The platform targets EU compliance, with the EU described as **44%** of Brazil's coffee market (**\$7B/year**, **~70k containers**, **~150 producers/container**) <sup>44</sup>.

### 3) Regional Developments

#### Brazil: soybean complex exports shift toward value-added products

- Brazil's soybean complex exports for Jan–Feb 2026 (with one week remaining in the tracking period) were framed as **grain volumes “sideways”** while **meal and oil surge**:
  - Soybean grain: **~6M tons** shipped <sup>45</sup>.
  - Soybean meal: **3.37M tons** shipped; expectation near **4M** (record) <sup>46</sup>.
  - Soybean oil: **0.36M tons** shipped vs **0.02M** prior year; expectation near **0.4M** <sup>47</sup>.
  - Total complex: **9.7M tons** so far vs **11M** prior year; expectation **12–12.5M** <sup>48</sup>.
- Canal Rural tied this to China “putting the foot on the brake,” citing China purchases falling from **5M tons** (Jan–Feb last year) to **<4M tons** this year, with tariffs/geopolitics among factors <sup>49</sup>.

“Liquidity is not synonymous with profitability.” <sup>50</sup>

#### Brazil: harvest pace + weather disruption

- Brazil's soybean harvest was described as slowest in five years by one private group (30% harvested vs 39% last year), with the crop described as **~180 MMT** and delays attributed to rain/late planting/longer cycles <sup>51</sup>.
- A separate Datagro-based update cited national harvest at **33%** with a national estimate of **182M tons**, with Mato Grosso at **68%** <sup>52</sup>.

<sup>41</sup>Conab lança plataforma para certificar o café brasileiro como livre de desmatamento

<sup>42</sup>Conab lança plataforma de certificação para produção de café brasileiro

<sup>43</sup>Conab lança plataforma para certificar o café brasileiro como livre de desmatamento

<sup>44</sup>Conab lança plataforma de certificação para produção de café brasileiro

<sup>45</sup>Complexo soja segue aquecido nas exportações de fevereiro | Agroexport

<sup>46</sup>Complexo soja segue aquecido nas exportações de fevereiro | Agroexport

<sup>47</sup>Complexo soja segue aquecido nas exportações de fevereiro | Agroexport

<sup>48</sup>Complexo soja segue aquecido nas exportações de fevereiro | Agroexport

<sup>49</sup>Complexo soja segue aquecido nas exportações de fevereiro | Agroexport

<sup>50</sup>AO VIVO: Brasil leva CAR digital à cúpula de IA na Índia e recebe apoio da Noruega | M&C – 24/02/2026

<sup>51</sup>Trump Tariff Threat + Americans “Can’t Quit” Eating Expensive Beef

<sup>52</sup>Piscicultura brasileira supera 1 mi de toneladas e cresce 58% em 10 anos | Rural Notícias-24/02/2026

- Canal Rural weather coverage described heavy rains in parts of Southeast Brazil (e.g., ~**250 mm** in Juiz de Fora over 48 hours), with fieldwork disruptions and continued rainfall outlooks affecting operations in multiple regions <sup>53</sup>.

#### **Brazil: Mato Grosso corn commercialization under pressure**

- In Mato Grosso, expected 2025/26 corn production was cited at **51.7M tons** (down nearly **7%**), with **32%** sold (below historical average) and prices down **25%** (available) and **27%** (future) vs year-ago, tied to weaker demand and FX impacts on export parity <sup>5455565758</sup>.

#### **Brazil logistics risk (export flow)**

- A Reddit post linked to reporting that protesters seized a **Brazil soybean terminal** during harvest season, disrupting a key export facility <sup>5960</sup>.

#### **EU/France: organic-sector support signal**

- France’s **Agence BIO** was reported as facing major budget cuts affecting outreach, project support, and sector data collection/monitoring, alongside recurring discussions of potential closure—seen as a risk to conversion momentum toward 2030 organic targets <sup>61626364</sup>.

#### **Africa: GM maize approval (Ethiopia)**

- Ethiopia approved commercial release of **TELA GM maize** <sup>6566</sup>.

### **4) Best Practices**

#### **Silage management: compaction and fermentation discipline (UK + Turkey)**

- On clamp management, one dairy segment emphasized that the most important “additive” is **tractor time for rolling**—“Roll, roll, roll. Get

<sup>53</sup>Piscicultura brasileira supera 1 mi de toneladas e cresce 58% em 10 anos | Rural Notícias-24/02/2026

<sup>54</sup>Vendas futuras de milho avançam com cautela e preocupam bolso do produtor

<sup>55</sup>Vendas futuras de milho avançam com cautela e preocupam bolso do produtor

<sup>56</sup>Vendas futuras de milho avançam com cautela e preocupam bolso do produtor

<sup>57</sup>Vendas futuras de milho avançam com cautela e preocupam bolso do produtor

<sup>58</sup>Vendas futuras de milho avançam com cautela e preocupam bolso do produtor

<sup>59</sup><sub>r</sub>/farming post by u/MennoniteDan

<sup>60</sup><sub>r</sub>/farming post by u/MennoniteDan

<sup>61</sup><sub>r</sub>/RegenerativeAg post by u/CrowdFarming

<sup>62</sup><sub>r</sub>/RegenerativeAg post by u/CrowdFarming

<sup>63</sup><sub>r</sub>/RegenerativeAg post by u/CrowdFarming

<sup>64</sup><sub>r</sub>/RegenerativeAg post by u/CrowdFarming

<sup>65</sup><sub>r</sub>/farming post by u/MennoniteDan

<sup>66</sup><sub>r</sub>/farming post by u/MennoniteDan

that air out...”<sup>67</sup>. The same source highlighted tight compaction to reduce spoilage and waste<sup>68</sup>.

- In a Turkish feed-management discussion:
  - Corn silage: harvesting too early was linked to lower starch (down to **20–25%**) and high moisture (DM **25–27%**), raising loss and health-risk concerns; use of inoculants (with attention to bacteria concentration) was strongly recommended<sup>69</sup>.
  - Wheat silage alternative: at dough stage, wheat silage was described at **18–22% starch, 32–35% DM**, with yield cited at **3.5–4 tons** (per decare in that segment) and positioned as a lower-cost option where irrigation is limited<sup>70</sup>.

### **Pastured layers: matching system to acreage and predator pressure (U.S.)**

- Joel Salatin described a rule-of-thumb that fully free-range eggmobile systems work best when you have **>50 acres**, because birds otherwise return to “home base” behavior<sup>71</sup>.
- For smaller acreages, he described a **hybrid concept** (mobile housing + supervised release limited to one day/week) to reduce familiarity-driven problems while still getting some ranging benefits<sup>72</sup>.
- On predation economics, he cited a threshold: unless losses are **~30%**, a fully enclosed, moved-daily system may not be necessary given labor tradeoffs<sup>73</sup>.

### **Small-scale egg commercialization: simplified compliance pathway (Brazil—São Paulo)**

- São Paulo described a simplified regulatory approach that increased registered artisanal egg establishments from **40 to 267** since 2023<sup>74</sup>.
- “Artisanal” classification was described as up to **250 dozen (3,000) eggs/day**<sup>7576</sup>. Registration was described as online (GDAV) and includes responsible technician oversight and vaccination/water controls<sup>77</sup>.

---

<sup>67</sup>WE DID IT!!!... FROM THE WORST IN THE WORLD TO THE BEST!!

<sup>68</sup>WE DID IT!!!... FROM THE WORST IN THE WORLD TO THE BEST!!

<sup>69</sup>Mısır Silajına Mahkum Değilsiniz. Buğday Silajı Hem Cebiniz Hem Hayvanınız İçin Cevher

<sup>70</sup>Mısır Silajına Mahkum Değilsiniz. Buğday Silajı Hem Cebiniz Hem Hayvanınız İçin Cevher

<sup>71</sup>Ranging or Not Ranging Layers

<sup>72</sup>Ranging or Not Ranging Layers

<sup>73</sup>Ranging or Not Ranging Layers

<sup>74</sup>Como regularizar a produção e a comercialização de ovos?

<sup>75</sup>Como regularizar a produção e a comercialização de ovos?

<sup>76</sup>Como regularizar a produção e a comercialização de ovos?

<sup>77</sup>Como regularizar a produção e a comercialização de ovos?

## 5) Input Markets

### Soybean oil: policy-driven strength vs. inventory caution

- Bean oil continued making **new contract highs** amid RVO/biofuel hopes, with caution about “buy the rumor, sell the fact” risk <sup>78</sup>.
- Another analyst flagged **high soybean oil stocks**, suggesting prices may be higher than fundamentals justify <sup>79</sup>.

### Equipment for early-season establishment

- Case IH launched the **Nutri-Tiller 1000 series** strip-till tool, described as promoting **early emergence** by creating a uniform strip with an “ideal berm shape,” aimed at boosting yield potential <sup>80</sup>.

### Finance constraint: borrowing costs

- Farm interest expense was cited at **\$33B and rising** (linked analysis) <sup>8182</sup>.

### Nutrients and agronomy chatter

- A social post asserted “**Zinc is key to soybean yield**” <sup>83</sup>.

## 6) Forward Outlook

### What to watch next

- **Wheat hedging window:** after a technical breakout in HRW wheat alongside dryness in HRW areas <sup>84</sup>, MarketMinute’s seasonal framing and its KC wheat hedge alert point to elevated pullback risk during a seasonally weaker stretch <sup>8586</sup>.
- **Brazil weather + harvest execution:** heavy rain has already slowed harvest in parts of Brazil and continues to interfere with field operations in multiple regions <sup>8788</sup>.

---

<sup>78</sup>Markets Now Closes - 2/24 Soybeans Rally on Talk of China Buying: Corn Wheat End Weak

<sup>79</sup>Markets Now Early - 2/2 What Do the New Tariffs Mean for China Trade & the Ag Markets?

<sup>80</sup> post by @SuccessfulFarm

<sup>81</sup>r/farming post by u/MennoniteDan

<sup>82</sup>r/farming post by u/MennoniteDan

<sup>83</sup> post by @AgPhDMedia

<sup>84</sup>Trump Tariff Threat + Americans “Can’t Quit” Eating Expensive Beef

<sup>85</sup> post by @MarketMinuteLLC

<sup>86</sup> post by @MarketMinuteLLC

<sup>87</sup>Trump Tariff Threat + Americans “Can’t Quit” Eating Expensive Beef

<sup>88</sup>Piscicultura brasileira supera 1 mi de toneladas e cresce 58% em 10 anos | Rural Notícias-24/02/2026

- **Northeast Brazil longer-range risk:** Canal Rural forecast commentary suggested El Niño could reduce rainfall and raise temperatures into early 2027, with negative implications for non-irrigated crops (including cacao) and elevated fire risk <sup>89</sup>.
- **Market trust + measurement:** USDA was reported to be seeking stakeholder feedback to improve crop and acreage data collection and analysis amid strained confidence <sup>90</sup>.
- **Producer cashflow relief (U.S.):** USDA described a **\$12B bridge payment** to combat increased production costs and trade disruptions <sup>91</sup>.

---

## Sources

1. Trump Tariff Threat + Americans “Can’t Quit” Eating Expensive Beef
2. Markets Now Early - 2/2 What Do the New Tariffs Mean for China Trade & the Ag Markets?
3. Markets Now Closes - 2/24 Soybeans Rally on Talk of China Buying: Corn Wheat End Weak
4. post by @MarketMinuteLLC
5. E17: 2026 Market Predictions with Patrick Linnell
6. New John Deere 8R & 8RX 540 Tractors Explained: Specs, Features & Use Cases
7. Tecnologia digital promete mais rentabilidade e produtividade no campo
8. 447: Selling to John Deere and Building AI Tools in Agriculture
9. post by @NickHorob
10. Conab lança plataforma para certificar o café brasileiro como livre de desmatamento
11. Conab lança plataforma de certificação para produção de café brasileiro
12. Complexo soja segue aquecido nas exportações de fevereiro | Agroexport
13. AO VIVO: Brasil leva CAR digital à cúpula de IA na Índia e recebe apoio da Noruega |M&C – 24/02/2026
14. Piscicultura brasileira supera 1 mi de toneladas e cresce 58% em 10 anos | Rural Notícias- 24/02/2026
15. Vendas futuras de milho avançam com cautela e preocupam bolso do produtor
16. r/farming post by u/MennoniteDan
17. r/RegenerativeAg post by u/CrowdFarming
18. r/farming post by u/MennoniteDan
19. WE DID IT!!!... FROM THE WORST IN THE WORLD TO THE BEST!!
20. Mısır Silajına Mahkum Değilsiniz. Buğday Silajı Hem Cebiniz Hem Hayvanınız İçin Cevher
21. Ranging or Not Ranging Layers

<sup>89</sup>El Niño irá influenciar negativamente produção de cacau em região da Bahia | Será Que Chove?

<sup>90</sup> post by @SuccessfulFarm

<sup>91</sup> post by @USDA

22. Como regularizar a produção e a comercialização de ovos?
23. post by @SuccessfulFarm
24. r/farming post by u/MennoniteDan
25. post by @AgPhDMedia
26. El Niño irá influenciar negativamente produção de cacau em região da Bahia | Será Que Chove?
27. post by @SuccessfulFarm
28. post by @USDA