



Rains wreak havoc on Brazilian corn and soy shipments

This week, traffic on Brazil's most important "grain highway", BR-163, is starting again after massive flooding resulted in a shutdown. The closure of the highway interrupted the flow of corn and soybeans after record setting production in the central part of the country.

As a result of the flood and terrible highway conditions, producers have suffered what one Brazilian news source describes as "severe losses." Another news source stated that more than 5,000 trucks were blocked or stranded and some drivers had been stuck for up to 20 days.

As a result, key agencies like the National Transport Confederation are working to establish an integrated logistics network comprised of railroad, highway, waterway and ports in order to make Brazil more competitive with the U.S.

Regardless of the highway shutdown, Informa Economics forecasts Brazil's soybean crop will reach a record-high 108 million tons. This figure is above the 105.6 million ton estimate of Brazil's government agency Conab, and also higher than USDA's figure of 104 million tons.

Argentina to become more competitive

The USDA hiked its 2025-26 forecast for Argentine wheat exports by 71 percent, to 12.5 million tons. This is due to an expanding wheat area in places where it can be double-cropped after soybeans.

The country's corn production is also forecasted to substantially increase and exports are projected to reach nearly 30 million tons in 2025-26 - an upgrade of 46% from the forecast made last year. On the other hand, the country's soybean production is expected to fall to 11.7 million tons.

Upbeat future outlook for U.S.

The USDA increased its estimate for soybean shipments in 2025-26 by 11.6% to 58.5 million tons. Likewise, the estimate for U.S. shipments of cotton were raised nearly 13% to 12.4 million bales in 2025-26. In addition, the U.S. is projected to account for one-third of the world soybean shipments in nine seasons' time; this is marginally higher than the estimate made last year.

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