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Commodity Intelligence Report

Brazil Crop Travel: Expectations for Summer Crops are High Despite Delayed Soybean Planting and Dryness in the South

Brazil's marketing year (MY) 2024/25 agricultural season began with a favorable outlook for soybeans, despite delayed planting and regional weather challenges. Crop analysts from FAS Washington and FAS Brasilia traveled in Brazil in late January for farm visits and meetings with industry experts to assess soybean crop conditions and gauge expectations for cotton and *safrinha* (second-season) corn. Brazil is the world's leading producer and exporter of soybeans. For cotton, Brazil is the third largest producer and the leading exporter. For corn, Brazil is the third largest producer and second largest exporter.

Soybean area continues to expand to new records in Brazil, however, the year-over-year expansion in MY 2024/25 is the lowest it has been since MY 2018/19. Area is up less than 3 percent over last year's record, at a new record of 47.4 million hectares (mha) (see Figure 1). Production is also estimated to be a record at 169.0 million metric tons (mmt), 10 percent over last season (see Figure 1). In addition to greater area, production increases have been driven by yields rebounding from last season's crop (see Figure 2), which was stricken by heat and dryness in the center-west region of the country and excessive rainfall in the south.

The soybean season is regulated in Brazil, which prohibits soybean planting for 90 days after the previous season's harvest is complete. This sanitary period is scheduled by state and/or region by t*he Ministério da Agricultura, Pecuária e Abastecimento* (MAPA), with the purpose of controlling for Asian soybean rust, a disease caused by the fungus *Phakopsora pachyrhizi.* Asian soybean rust is easily spread by the wind and causes premature defoliation and maturation and can decimate soybean yields.

The primary agricultural season begins in September in Brazil with soybeans, coinciding with the end of the soybean sanitary period and the onset of seasonal rains in the Central-West and south of Brazil (see Figure 3). An optimal rainy season would begin in early September and extend through April, or even into early May. This scenario allows for soybean planting in September and promotes an earlier harvest, beginning as early as January and concluding by the end of February. An earlier soybean harvest enables earlier planting of *safrinha* corn and cotton, granting these crops adequate time to develop before the rainy season ends in early May. A late soybean harvest or an early end to the rainy season could compress *safrinha* corn and cotton seasons and diminish their yields.

Corn area in MY 2024/25 is up 4 percent from last year, as prices have rebounded higher, incentivizing farmers to plant more. USDA estimates Brazil corn area at 22.3 mha and production at 126.0 mmt (see Figure 4). Corn is planted in three seasons, according to *Companhia Nacional de Abastecimento* (CONAB). The first season is a summer crop primarily grown in the south, which is planted in September through January and harvested between January and August (see Figure 5). First season corn is typically higher-yielding, (see Figure 6) and accounts for roughly 24 percent of annual national production. Second crop corn, or *safrinha* corn, is the largest crop, accounting for roughly 76 percent of total production. *Safrinha* corn is grown primarily in the Central-West, planted as a second crop after soybeans are harvested, between January and April (see Figure 7). Second corn harvest is between June and September. A relatively marginal third crop is grown in the north and northeast (primarily in the states of Bahia and Sergipe), planted between April and June, and harvested between July and December.

Brazil produced a record 17.0 million bales of cotton in MY 2024/25 and became the world's leading cotton exporter (see Figures 8 & 9). Marketing years for cotton in Brazil are not the same as marketing years for soybeans and corn. The cotton in the ground now will be estimated for MY 2025/26 whereas the current soybean and corn crops are for MY2024/25. USDA estimates for Brazil cotton were adjusted ahead, with a series revision in 2023, for better alignment of the harvest and marketing of Brazilian cotton with world markets. USDA's first estimates of MY2025/26 cotton will be released in May 2025. Cotton area expanded 19 percent in MY 2024/25 over the previous season to just under 2.0 mha (see Figure 8). Cotton is grown primarily in Bahia (20 percent of total production) and Mato Grosso (71 percent). Cotton is largely a first crop in Bahia, where planting begins in November and harvest begins in May (see Figure 10). In the Central-West, and primarily in Mato Grosso, cotton is grown as a second crop and often preferred alternative to *safrinha* corn. Central-West cotton planting begins after the soybean harvest in January, and its harvest begins in June, running through September (see Figure 10).

Crop Conditions

MY 2024/25 saw a delayed onset of seasonal rains and planting. Adequate, sustained rains did not arrive until the second week of October (see Figure 11), which compressed the planting window for soybeans (see Figure 12). The downstream effect is a compressed soybean harvest window and potential delays in planting for *safrinha* corn and cotton.

Despite these delays, soybean planting and crop development progressed rapidly, and conditions were positive through the month of January. FAS analysts met with government and industry representatives in São Paulo and Brasilia, who expressed optimism regarding soybean, corn, and cotton production. The consensus outlook from these industry representatives is for a record soybean crop, despite challenges with heat and dryness in the south, and for record cotton production. Corn production is expected to be higher than last season. Increasing corn prices were noted during these discussions, and a significant increase in corn seed sales was reported.

FAS analysts also traveled to northern Mato Grosso do Sul and southern Mato Grosso to observe crop conditions and to meet with farmers and industry representatives. The soybean crop was notably behind in progress from last season, in many areas. However, farmers in the region expressed optimism for the timing of harvest, and their expectations were high for yields. Average to above-average conditions were observed throughout this travel region (see Figures 13, 14, and 15). These ground observations support conditions observed in satellite-derived Normalized Difference Vegetation Index (NDVI) and Percent of Average Seasonal Greenness (PASG) analyses, which indicate above-average crop conditions for Mato Grosso, Goiás, and northern Mato Grosso do Sul (see Figures 16 and 17). NDVI analysis offers a view of crop conditions at a particular point in the season, in this case, mid-January, when much of the crop was in pod fill stages. PASG analysis indicates cumulative crop health relative to average, over a longer period, and in this case, during the entire month of January (see Figure 17). NDVI and PASG indicate poorer conditions for Parana, Rio Grande do Sul, and southern Mato Grosso (see Figures 16 and 17). Field observations and discussions with farmers and representatives from *Aprosoja-MS*, the soybean growers' association in Mato Grosso do Sul, supported the conclusions in this analysis.

Soybeans were more advanced in late January in the northern areas of the travel region, and harvested soybean fields were observed near Primavera do Leste, Mato Grosso. This is also an area of cotton cultivation, and emerging cotton was observed in many fields (see Figure 18). A common response by farmers to delayed soybean planting is shorter season soybean varieties, particularly if cotton is the second crop.

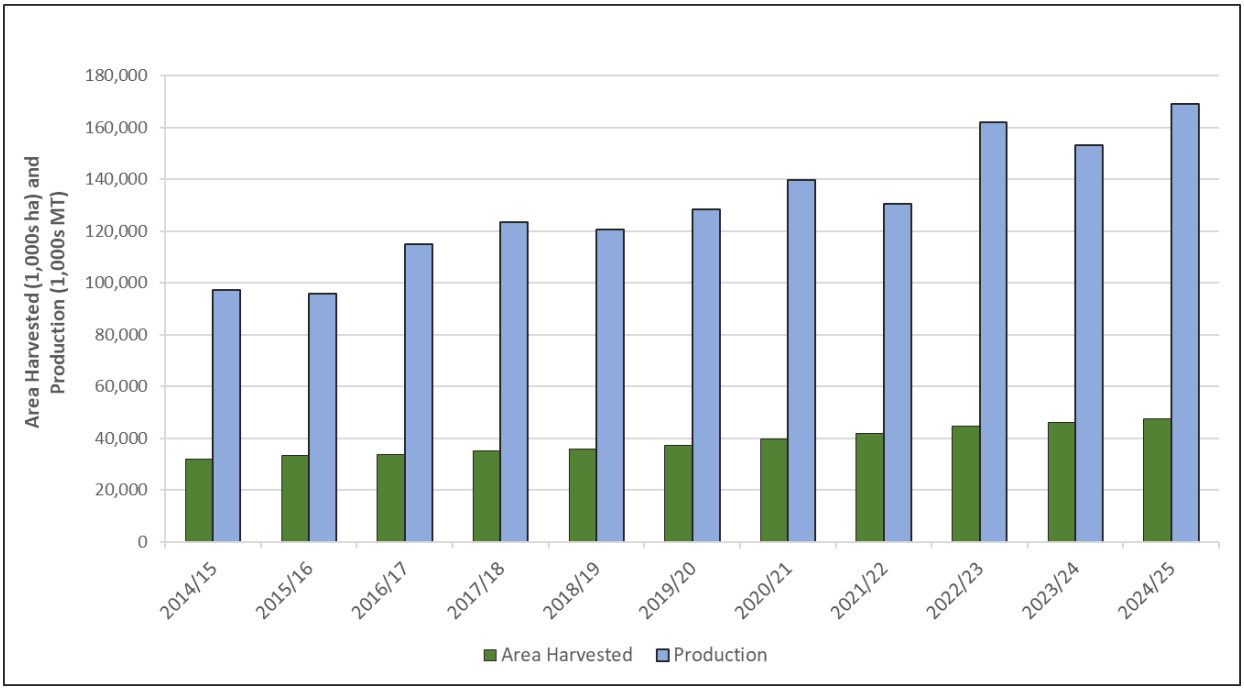
Expectations for Summer Crops and Conclusions

Expectations remain high for the three main summer crops. USDA estimates soybean production to be a record, as yield losses in the south will be offset by high yields in the Central-West. In addition, corn prices have incentivized farmers to plant the crop for the *safrinha* season, as indicated by high seed sales. While USDA does not have an official estimate for the MY 2025/26 cotton currently being cultivated in Brazil, early indications are that cotton production will remain high.

One final, notable observation was the prevalence of irrigation in southern Mato Grosso, near Primavera do Leste. FAS analysts observed a pilot project for irrigation fed by groundwater (see Figure 19). Traditional irrigation systems are fed by local rivers, a potential limiting factor. Regulations for groundwater-fed irrigation is lacking in Mato Grosso, rendering the practice illegal. State-run pilot projects have begun assessing the feasibility of using groundwater for irrigation and the response of water table levels. The implications for groundwater applications for irrigation are significant for Brazilian agriculture, should regulatory mechanisms be implemented to legalize the practice.

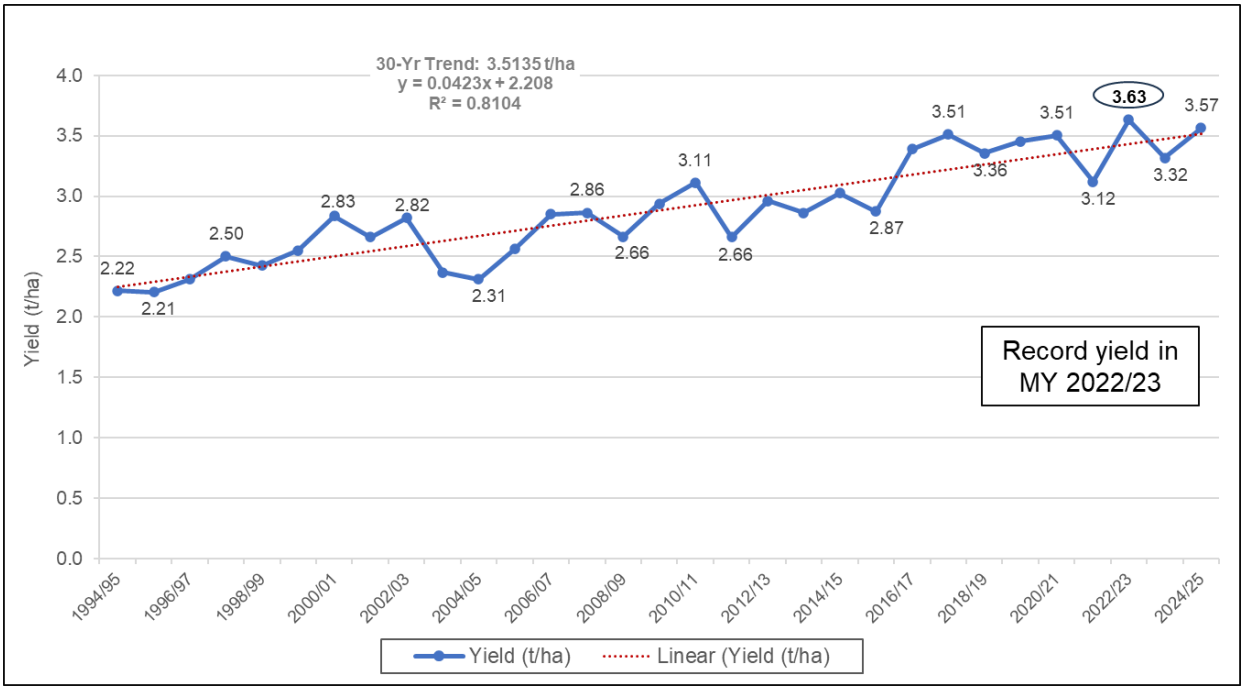
Contributions to this report by the USDA Foreign Agricultural Service Office of Agricultural Affairs and members of the agricultural community in Brazil are gratefully acknowledged.

Figure 1: Harvested Area and Production of Brazil Soybeans



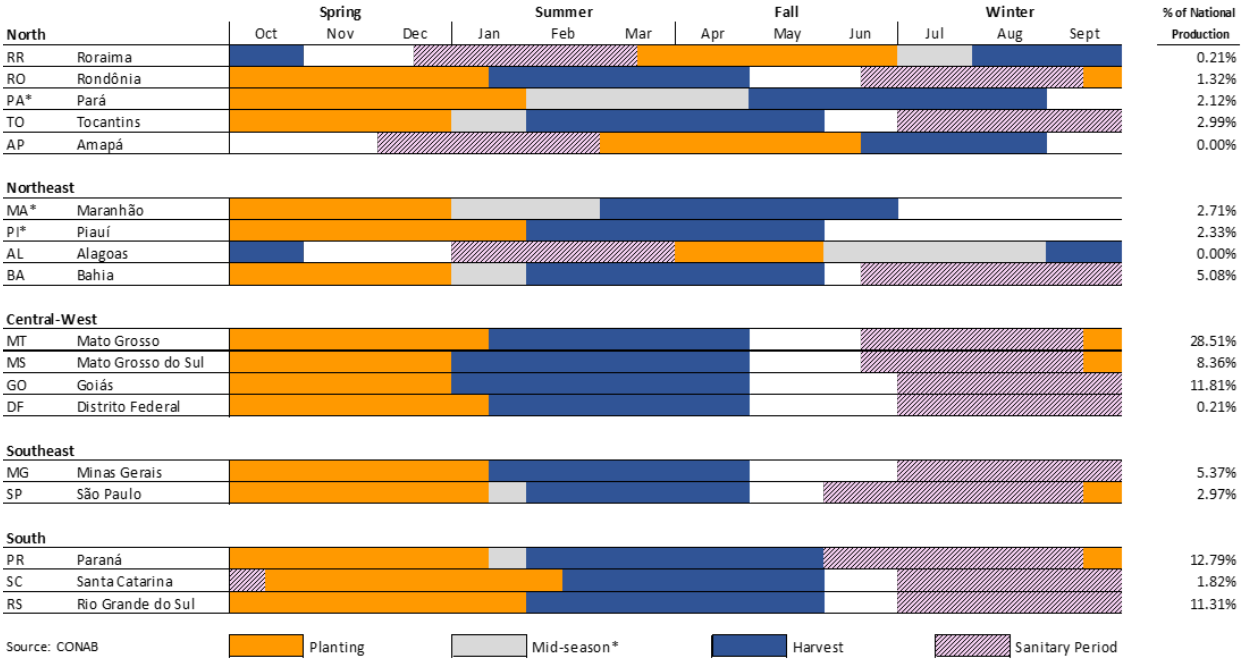
Note: Brazil soybeans harvested area and production, MY 2014/15 through 2024/25. Brazil is the world's leading soybean producer. USDA estimates record harvested area and production for MY 2024/25. Source: USDA PSD Online

Figure 2: 30-Year Time Series of Brazil Soybean Yield

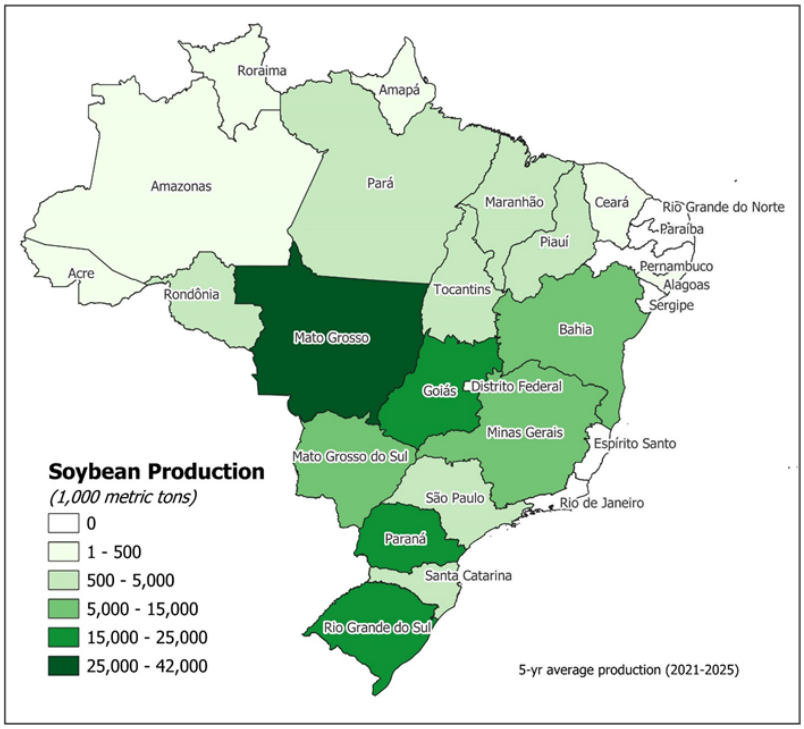


Note: Brazil soybean yield 30-year time series. Crop conditions are positive for MY 2024/25. USDA estimates soybean yields will be the second highest on record for MY 2024/25. Source: USDA PSD Online

Figure 3: Crop Calendar and Map for Brazil Soybeans

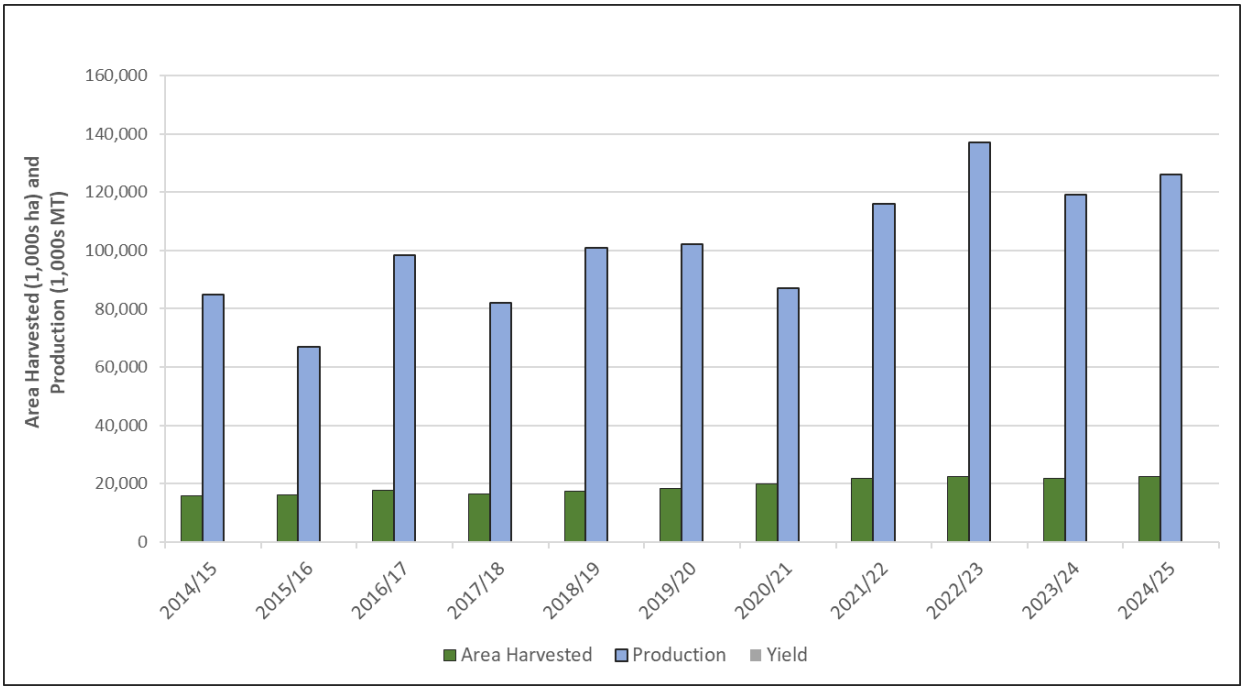


*Planting/harvest periods are approximate. The sanitary period follows a more complex regional schedule within the state.



Note: Brazil soybean crop calendar and production map based on a 5-year average (2021-25). Planting begins after the mandated sanitary period, and in most areas, at the onset of seasonal rains. Production is concentrated in the Central-West region and the southern portion of the country. Sources: *Companhia Nacional de Abastecimento* (CONAB); *Ministério da Agricultura, Pecuária e Abastecimento* (MAPA)

Figure 4: Harvested Area and Production of Brazil Corn



Note: Brazil corn harvested area and production, MY 2014/15 through 2024/25. Corn area is up, year-to-year in MY 2024/25, primarily due to higher prices. USDA estimates corn production for MY 2024/25 to be the second highest on record. Corn is primarily grown in two major seasons. Source: USDA PSD Online

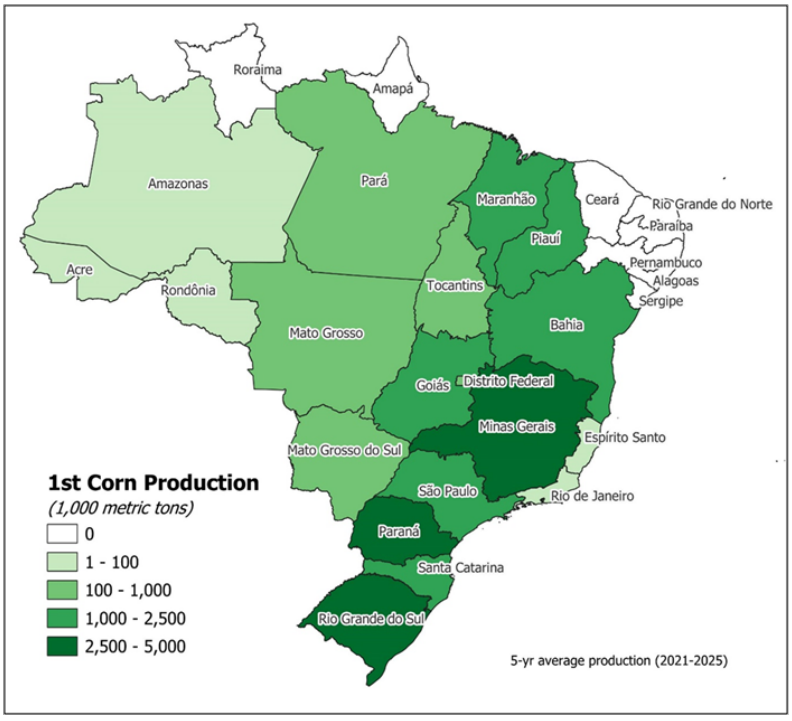
Figure 5: Crop Calendar and Map for Brazil First Season Corn

		Spring			Summer			Fall			Winter			% of National
North		Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Production
RO	Rondônia													0.20%
AC	Acre													0.39%
AM	Amazonas													0.10%
PA	Pará													2.23%
TO	Tocantins													1.31%
Northeast														
MA	Maranhão													5.97%
PI	Piauí													7.30%
BA	Bahia													8.43%
Central-West														
MT	Mato Grosso													2.10%
MS	Mato Grosso do Sul													0.62%
GO	Goiás													6.42%
DF	Distrito Federal													0.65%
Southeast														
MG	Minas Gerais													19.23%
ES	Espírito Santo													0.17%
RJ	Rio de Janeiro													0.03%
SP	São Paulo													7.36%
South														
PR	Paraná													11.89%
SC	Santa Catarina													9.19%
RS	Rio Grande do Sul													16.42%

Source: CONAB

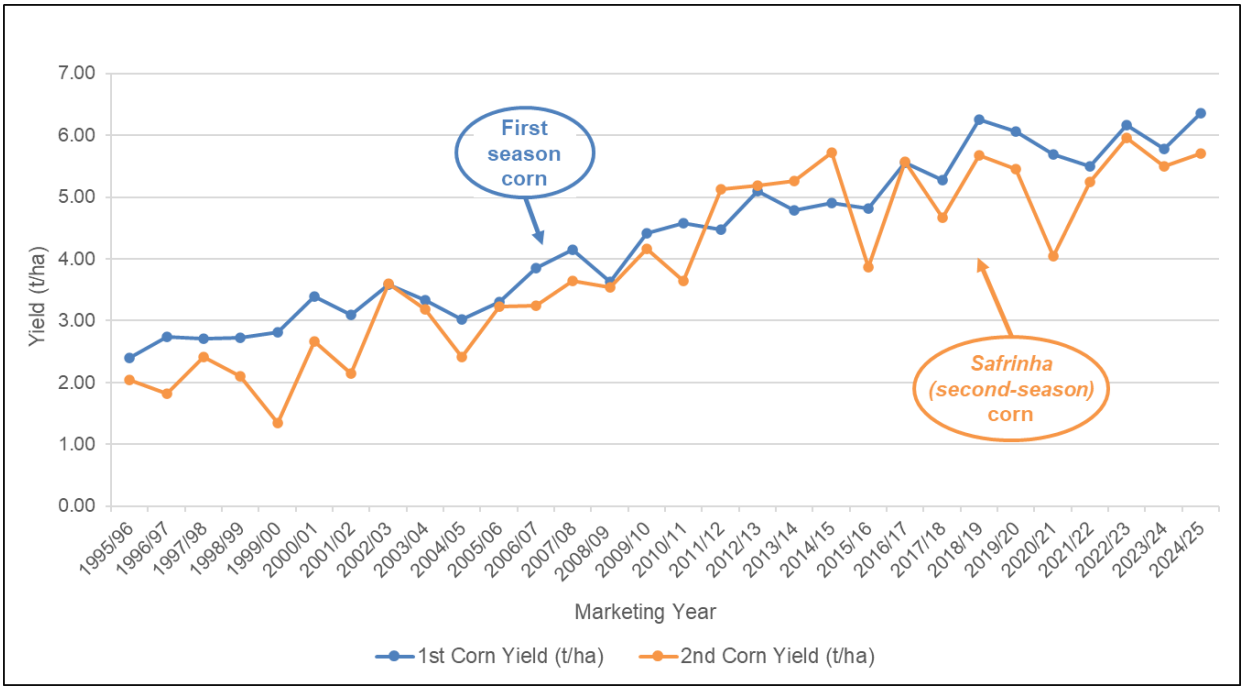
Planting | Mid-season* | Harvest

*Mid-season may include a mix of planting/harvest activities



Note: Brazil's first season corn crop calendar and production map based on a 5-year average (2021-25). Planting begins in September. Production is concentrated in the southern portion of the country. First season corn is typically higher yielding than *safrinha* corn, but only accounts for 24 percent of Brazil's total annual corn production. Source: *Companhia Nacional de Abastecimento* (CONAB)

Figure 6: 30-Year Time Series of Brazil Corn Yield, by Season



Note: Brazil corn yield by season, 30-year time series. First season corn (24 percent of total national production) is generally higher yielding than *safrinha* (second season) corn (76 percent of total national production). Source: *Companhia Nacional de Abastecimento* (CONAB)

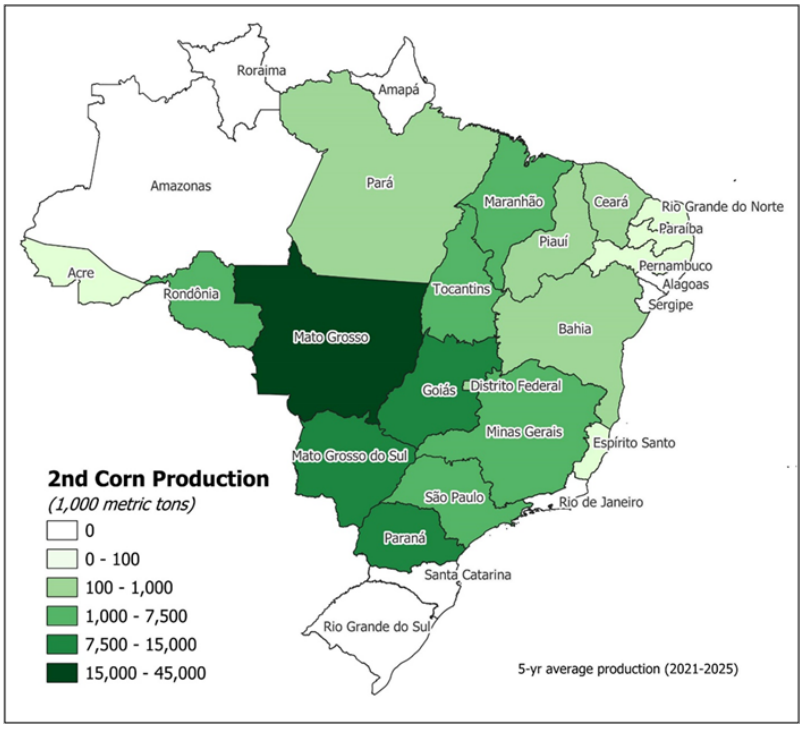
Figure 7: Crop Calendar and Map for Brazil *Safrinha* Corn

		Spring			Summer			Fall			Winter			% of National
North		Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Production
RO	Rondônia													1.66%
TO	Tocantins													1.83%
Northeast														
MA	Maranhão													1.52%
PI	Piauí													0.58%
PE	Pernambuco													0.10%
CE	Ceará													0.61%
RN	Rio Grande do Norte													0.03%
PB	Paraíba													0.08%
BA	Bahia													0.18%
Central-West														
MT	Mato Grosso													50.32%
MS	Mato Grosso do Sul													11.82%
GO	Goiás													10.84%
DF	Distrito Federal													0.25%
Southeast														
MG	Minas Gerais													2.67%
SP	São Paulo													2.52%
South														
PR	Paraná													13.89%

Source: CONAB — Planting; Mid-season*; Harvest

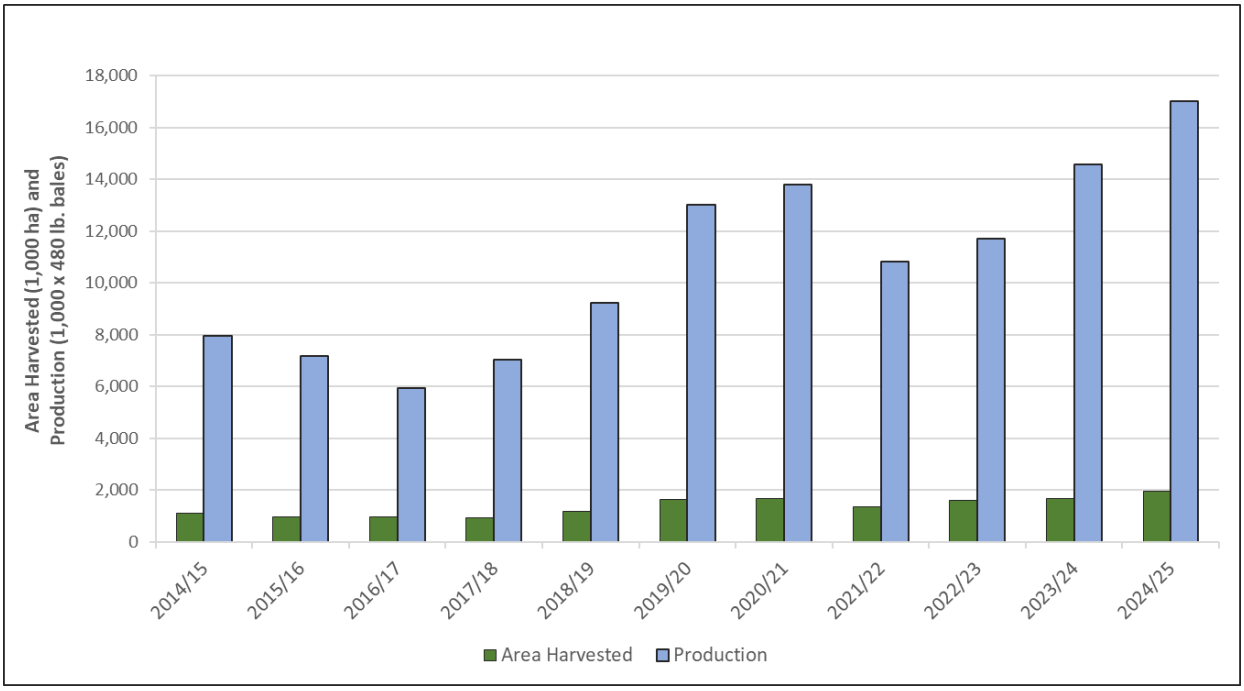
*Mid-season may include a mix of planting/harvest activities

Acre	0.04%
Espirito Santo	0.02%
Pará	1.05%



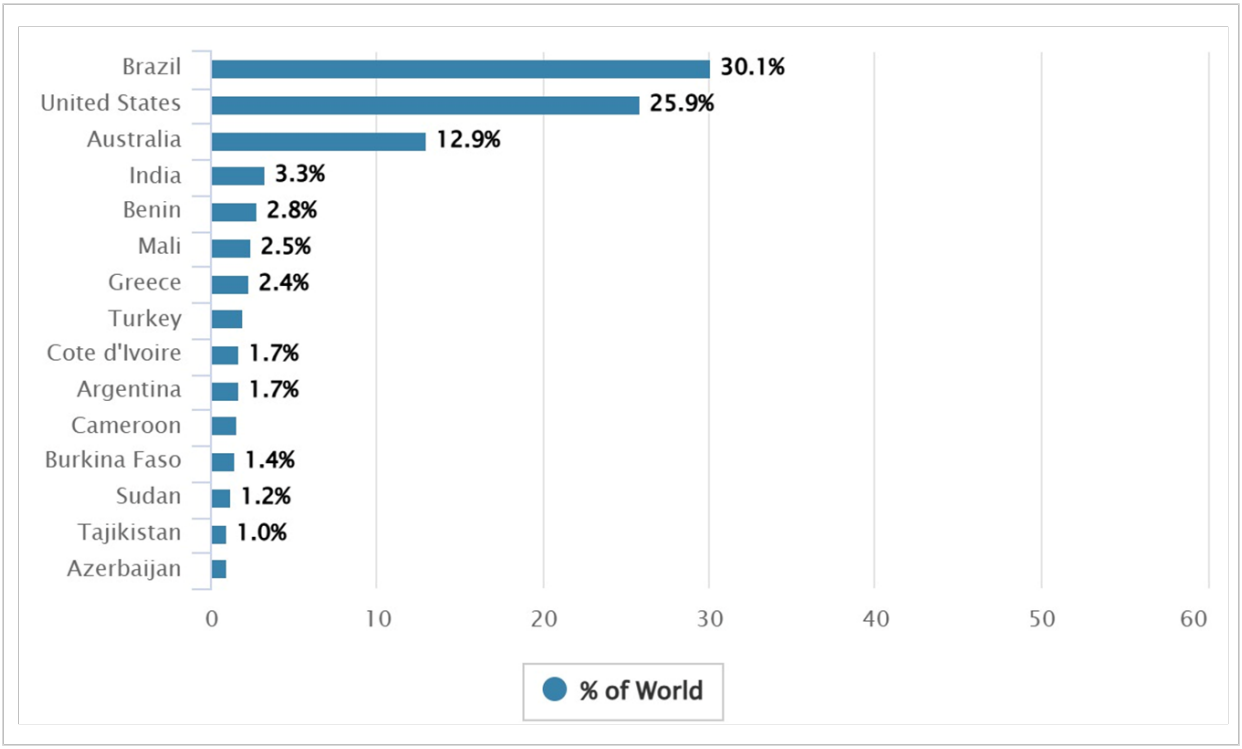
Note: Brazil's safrinha or second corn crop calendar and production map based on a 5-year average (2021-25). Planting begins in January, following the soybean harvest. Safrinha corn accounts for 76 percent of Brazil's total annual corn production. Source: *Companhia Nacional de Abastecimento* (CONAB)

Figure 8: Harvested Area and Production of Brazil Cotton



Note: Brazil cotton harvested area and production, MY 2014/15 through 2024/25. Brazil produced a record cotton crop in MY 2024/25 and became the world's leading cotton exporter. The cotton currently being planted will be harvested in MY 2025/26, for which USDA will publish its first estimate in May 2025. Source: USDA PSD Online

Figure 9: Percent of Annual World Total Cotton Exports in MY 2024/25



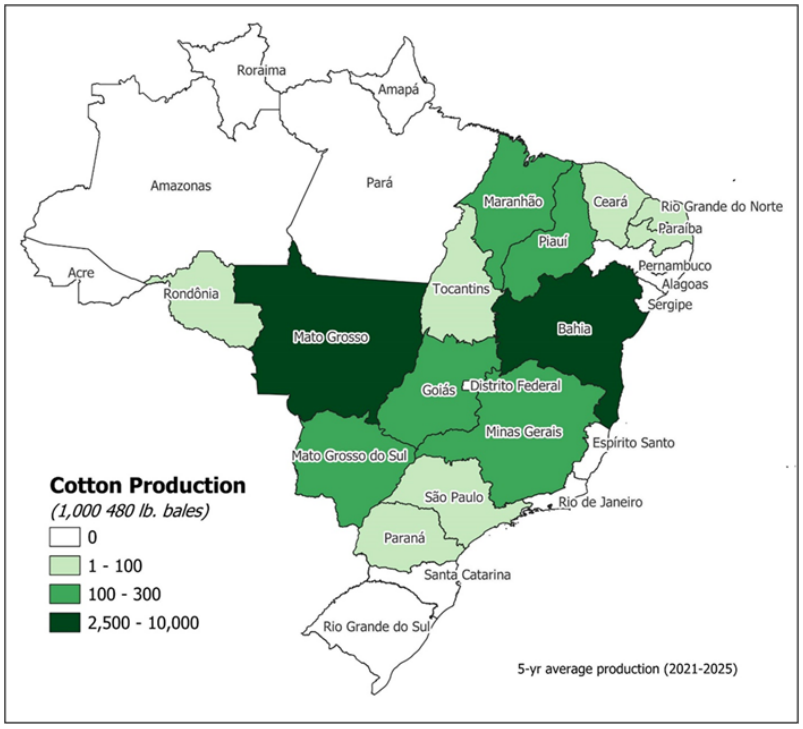
Note: MY 2024/25 top 15 cotton exporters, by percent of global exports. Brazil became the world's leading cotton exporter in MY 2024/25. Source: USDA PSD Online

Figure 10: Crop Calendar and Map for Brazil Cotton

		Spring			Summer			Fall			Winter			% of National
North		Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Production
RO	Rondônia													0.41%
TO	Tocantins													0.40%
Northeast														
MA	Maranhão													1.79%
PI	Piauí													1.09%
CE	Ceará													0.06%
RN	Rio Grande do Norte													0.01%
PB	Paraíba													0.01%
BA	Bahia													19.72%
Central-West														
MT	Mato Grosso													70.55%
MS	Mato Grosso do Sul													1.95%
GO	Goiás													1.69%
Southeast														
MG	Minas Gerais													1.73%
SP	São Paulo													0.51%
PR	Paraná													0.05%

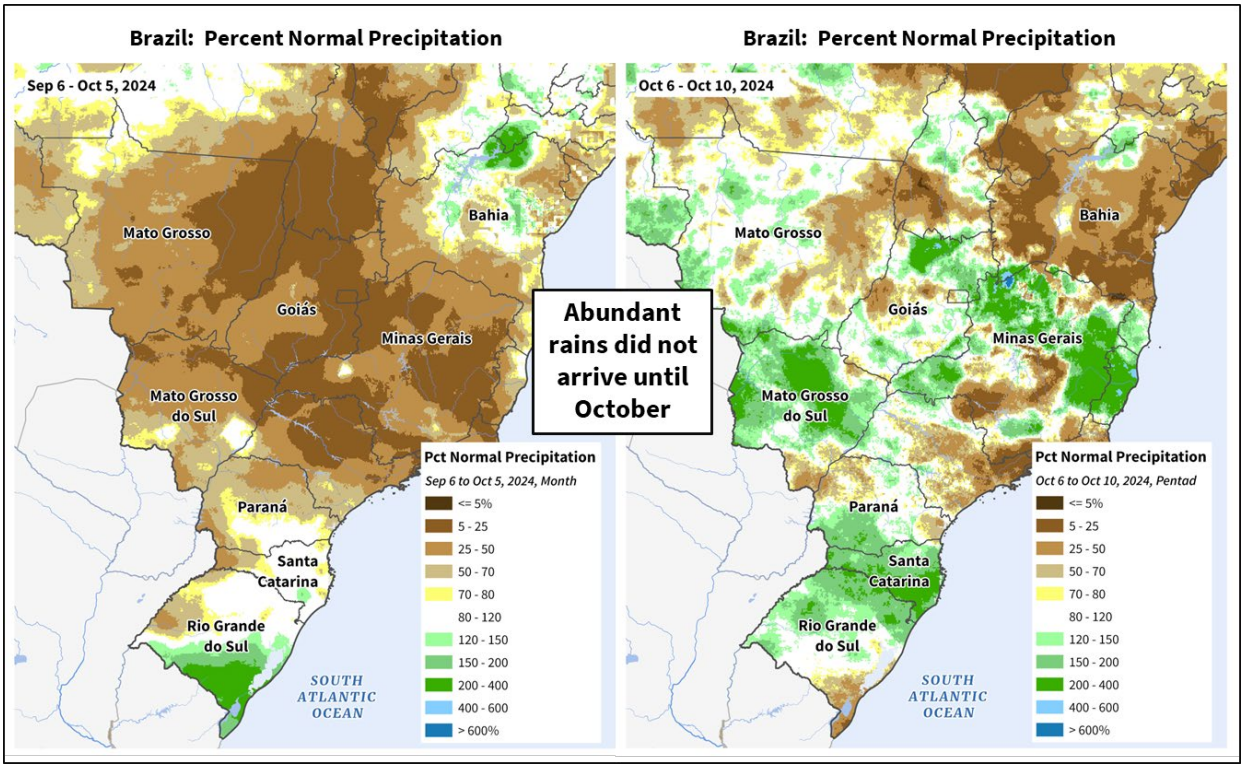
Source: CONAB — Planting — Mid-season* — Harvest

*Mid-season may include a mix of planting/harvest activities



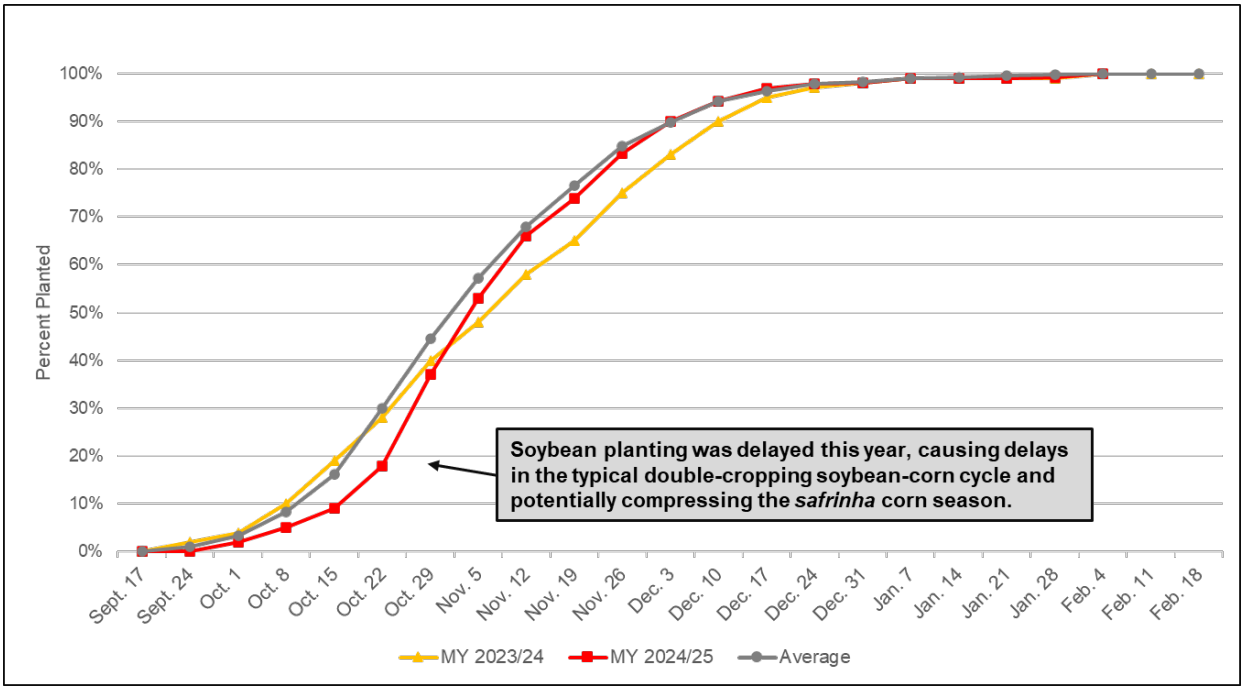
Note: Brazil cotton crop calendar and production map based on a 5-year average (2021-25). Production is concentrated primarily in Mato Grosso (71 percent of total production) and Bahia (20 percent). First crop cotton planting begins in November in Bahia; and second crop cotton planting begins in December/January in Bahia and Mato Grosso, following the soybean harvest. Source: *Companhia Nacional de Abastecimento* (CONAB)

Figure 11: Delayed Onset of the Rainy Season in Brazil



Note: Percent of normal precipitation. Soybean planting is largely dependent on the onset of seasonal rains, which ideally begin in mid-September. Consistent rains, however, did not arrive until the second week of October in 2024, delaying soybean planting, which threatened delays in soybean harvest and planting of cotton and *safrinha* corn. Source: UCSB Climate Hazards Center InfraRed Precipitation with Station data (CHIRPS) v2 Precipitation Data

Figure 12: Brazil Soybean Planting Progress by Week

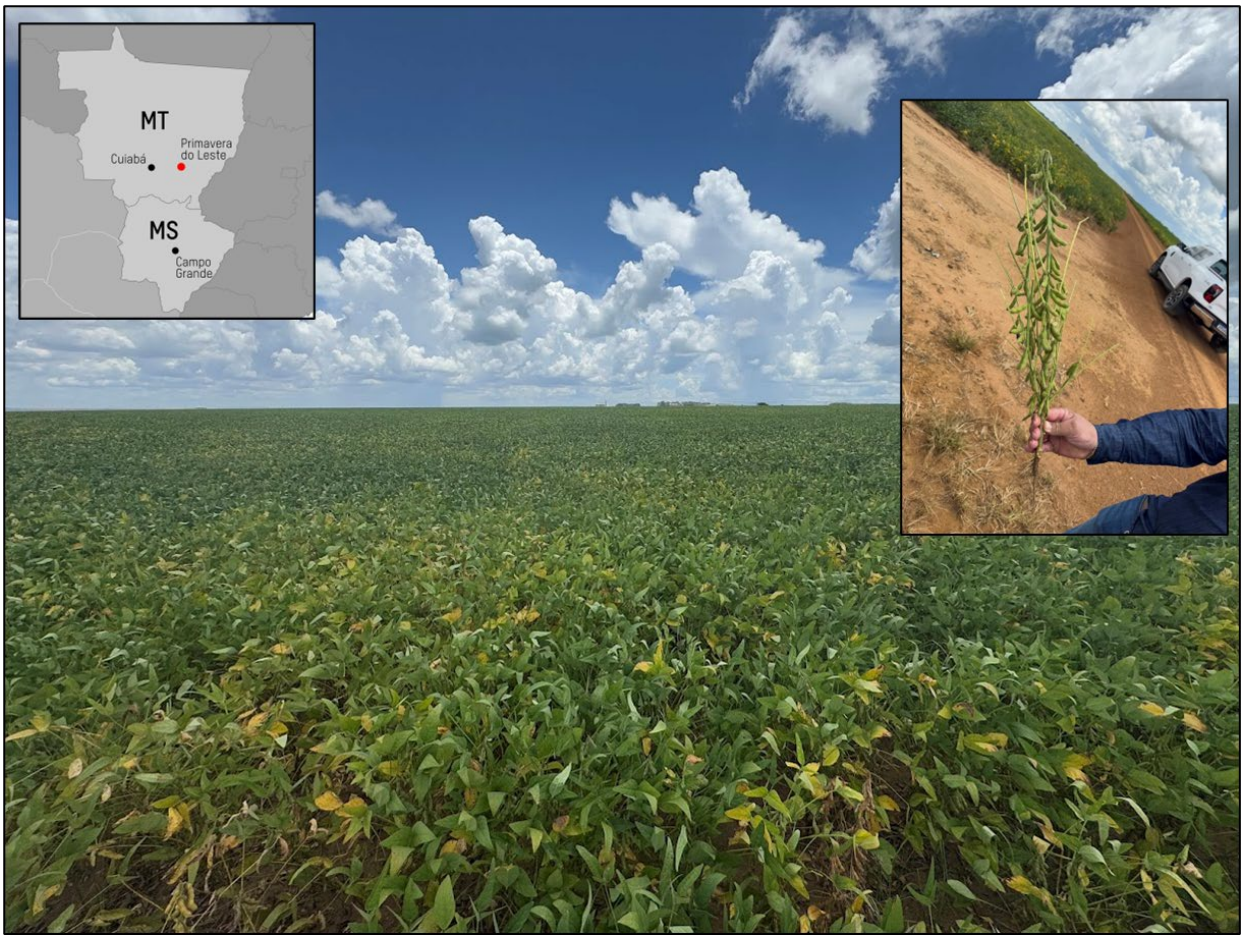


Note: Weekly planting progress of soybeans for the current year (MY 2024/25), last year, and average. Soybean planting was delayed in 2024, due to the late arrival of the rainy season. Delays in soybean planting can push back the harvest, and delay cotton and *safrinha* corn planting, reducing the available time for those crops to develop before the end of the rainy season in late April. Source: *Companhia Nacional de Abastecimento* (CONAB)

Figure 13: Soybeans, south of Rondonópolis, Mato Grosso

Note: Soybeans were primarily in grain fill stages and in good condition, south of Rondonópolis, Mato Grosso. Average-to-above-average yields are expected for soybeans in this region. Photo courtesy of Aaron Mulhollen, USDA Foreign Agricultural Service

Figure 14: Soybeans, near Primavera do Leste, Mato Grosso

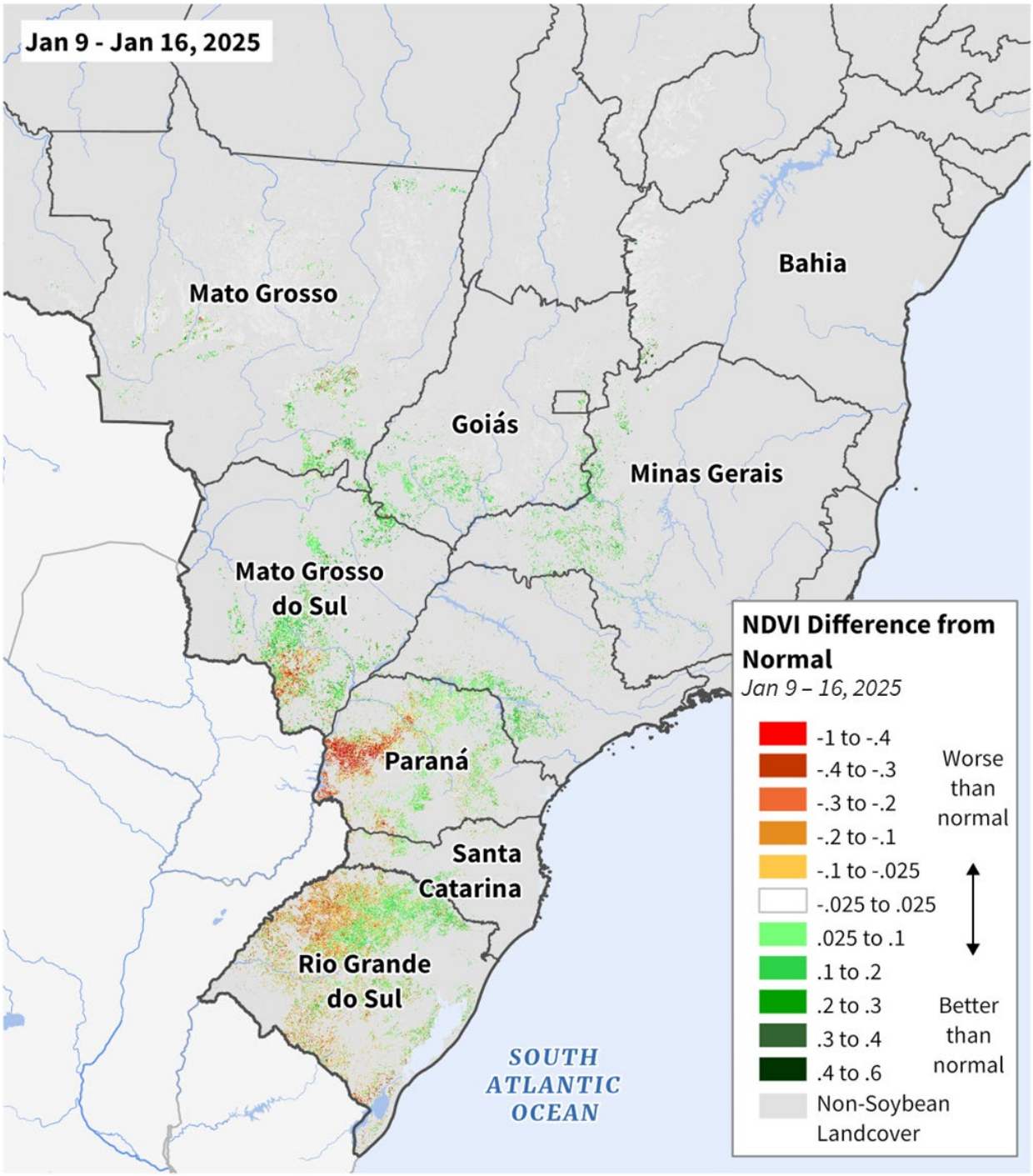


Note: Soybeans were primarily in pod fill stages and in good condition, near Primavera do Leste, Mato Grosso. Average to above-average yields are expected for soybeans in this region. Photo courtesy of Aaron Mulhollen, USDA Foreign Agricultural Service

Figure 15: Soybeans, near São Gabriel do Oeste, Mato Grosso do Sul

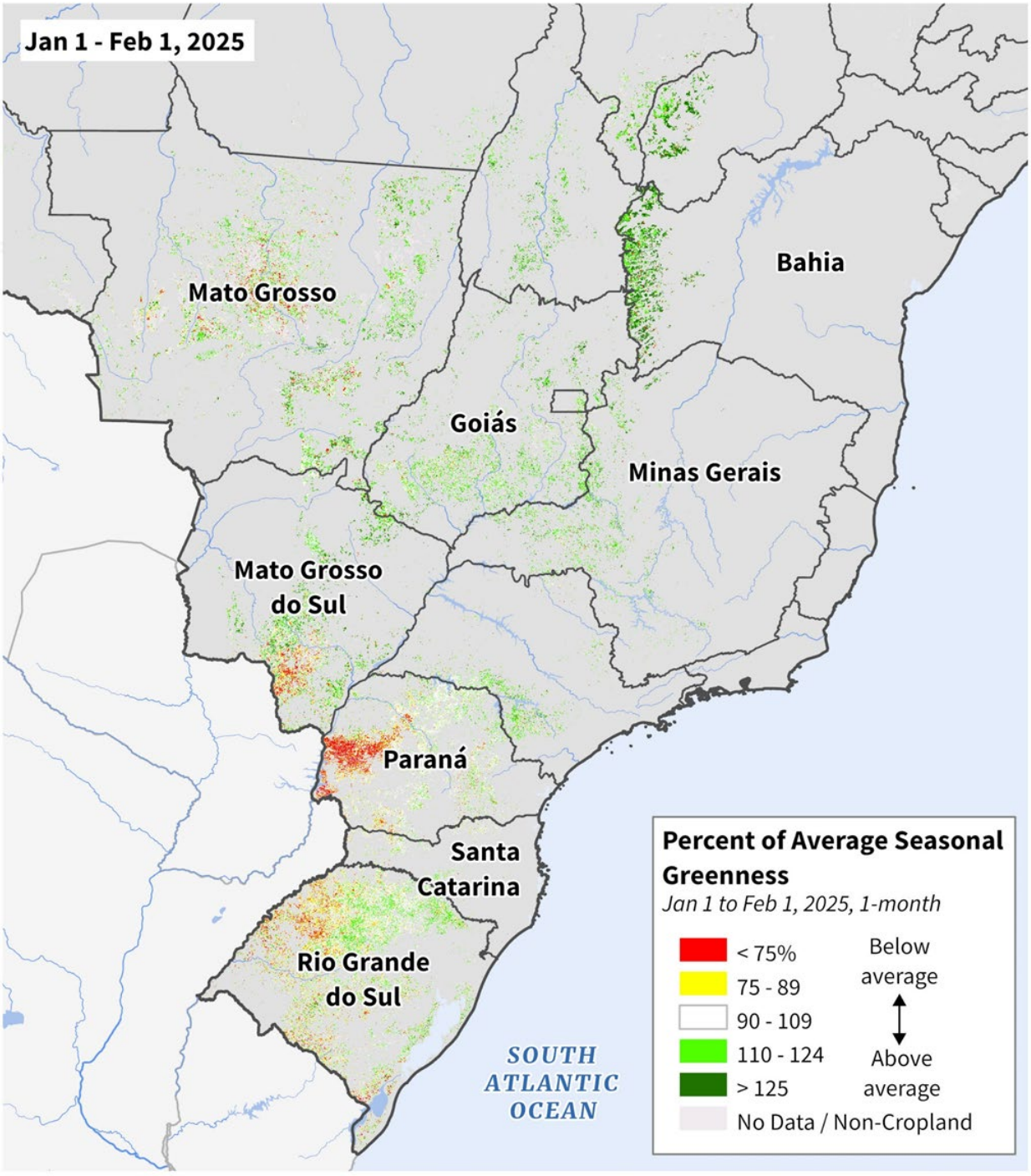
Note: Soybeans were primarily in pod fill stages and in good condition, near São Gabriel do Oeste, Mato Grosso do Sul. Above-average yields are expected for soybeans in this region. Photo courtesy of Aaron Mulhollen, USDA Foreign Agricultural Service

Figure 16: MODIS NDVI Difference from Normal



Note: Satellite-derived NDVI analysis around the peak of the growing season indicates average to above-average soybean crop conditions in most of the Central-West region and extending to the east. Below-average crop conditions were observed in southern Mato Grosso do Sul, western Paraná, and Rio Grande do Sul. Sources: NASA MODIS 8-Day NDVI Anomaly, 250m Imagery; Crop Mask based on GDA 2023 Soybean Classification

Figure 17: Percent of Average Seasonal Greenness



Note: Percent of Average Seasonal Greenness (PASG) analysis is a cumulative measure of vegetation health. At the peak of the growing season in January, PASG analysis indicated above-average soybean crop conditions in most of the Central-West region and extending to the east. Below-average crop conditions were observed in southern Mato Grosso do Sul, western Paraná, and Rio Grande do Sul. Sources: USDA/NASA Percent of Average Seasonal Greenness (PASG) derived from MODIS NDVI; Crop Mask based on GDA 2023 Soybean Classification

Figure 18: Emerging Cotton, near Primavera do Leste, Mato Grosso

Note: Recently planted cotton was emerging, near Primavera do Leste, Mato Grosso. Cotton planting follows the soybean harvest in the Central-West region. Photo courtesy of Aaron Mulhollen, USDA Foreign Agricultural Service

Figure 19: Center-Pivot Irrigation in a Soybean Field, near Primavera do Leste, Mato Grosso

Note: A center-pivot irrigation system in a soybean field, near Primavera do Leste, Mato Grosso. This irrigation system is at a farm in southern Mato Grosso participating in a pilot program to test the viability of using ground water for irrigation. The current lack of regulation renders ground water usage for irrigation, illegal. Once regulations are in place, farmers will be able to expand irrigation systems throughout this region. Photo courtesy of Aaron Mulhollen, USDA Foreign Agricultural Service

Author contact information:

Aaron Mulhollen
aaron.mulhollen@usda.gov

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