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Expansion of Brazil's Soybean and Corn Lands: An outlook for 2026 and Beyond

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February 5, 2026

ARPC Brief 2026–05

Recommended citation format: Hongxi Zhao, Rwit Chakravorty, and Shawn Arita (2026). *Expansion of Brazil's Soybean and Corn Lands: An outlook for 2026 and Beyond.* ARPC Brief 2026–05. Agricultural Risk Policy Center, North Dakota State University.

Looking ahead to 2026, Brazil's soybean and corn sectors are expected to continue exerting pressure in global agricultural markets through ongoing expansion of cultivated land and rising export capacity. For the 2025/26 season, preliminary estimates from CONAB suggest that soybean acreage will reach approximately 121 million acres, while corn acreage is projected to increase by about 4 percent to roughly 56 million acres, reflecting producer responses to strong external demand and sustained domestic utilization (Table 1) . This expansion in planted area supports projected exports of approximately 114 million metric tons of soybeans and 43 million metric tons of corn in 2026 (Companhia Nacional de Abastecimento, 2025), corresponding to increases of about 5 percent for soybeans and 16 percent for corn relative to 2025.

A distinctive feature of Brazilian agriculture is that consistent rainfall and warm temperatures throughout the year in tropical and savanna biomes make double cropping feasible. Safrinha corn (or second-crop maize) now accounts for more than 70 percent of total maize area (Malins, 2022) and produces roughly three times the output of first-crop maize. Nationwide, approximately 40 percent of soybean cropland is also used to cultivate Safrinha corn (Colussi et al., 2024). As shown in Figure 1, soybean and corn planted areas have expanded largely on the same land base. Regions outside traditional soybean areas, includ-

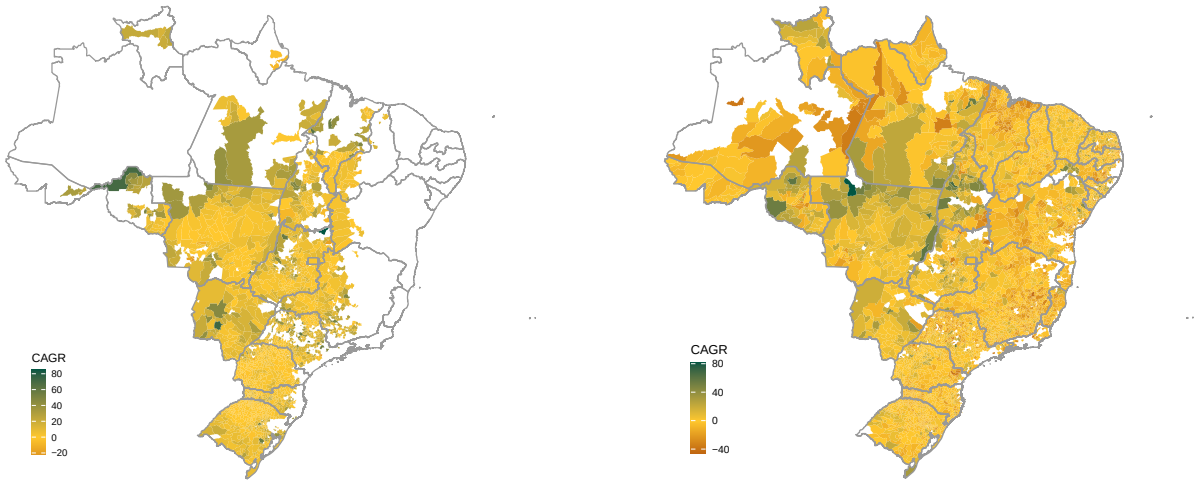
ing Pará, Rondônia, and parts of Mato Grosso do Sul, have recorded some of the highest rates of simultaneous expansion in soybean and corn. Statistics in Table 1 indicate that the double-cropping system has expanded steadily over the past decade as a relatively low-cost method of increasing production, and CONAB projects further growth in the 2025/26 harvest season, with approximately 80 percent of maize production expected to come from Safrinha corn.

Table 1: ***Sources of Soybean Planted Acreage Expansion.***

	2004–2014		2014–2024	
Original land type	Area (million acres)	Percentage	Area (million acres)	Percentage
Pasture	8.50	29.54%	8.65	26.99%
Forest	4.30	14.92%	2.07	6.46%
Double cropping	13.66	47.42%	19.83	61.88%
Perennial crops	0.04	0.14%	0.04	0.12%
Vegetation	2.30	7.99%	1.46	4.55%

Source: Authors' calculations using MapBiomas Project (2025).

Figure 1: ***Brazilian Soybean and Corn Annualized Growth Rates 2014–2024.***



(a) Soybean (b) Corn

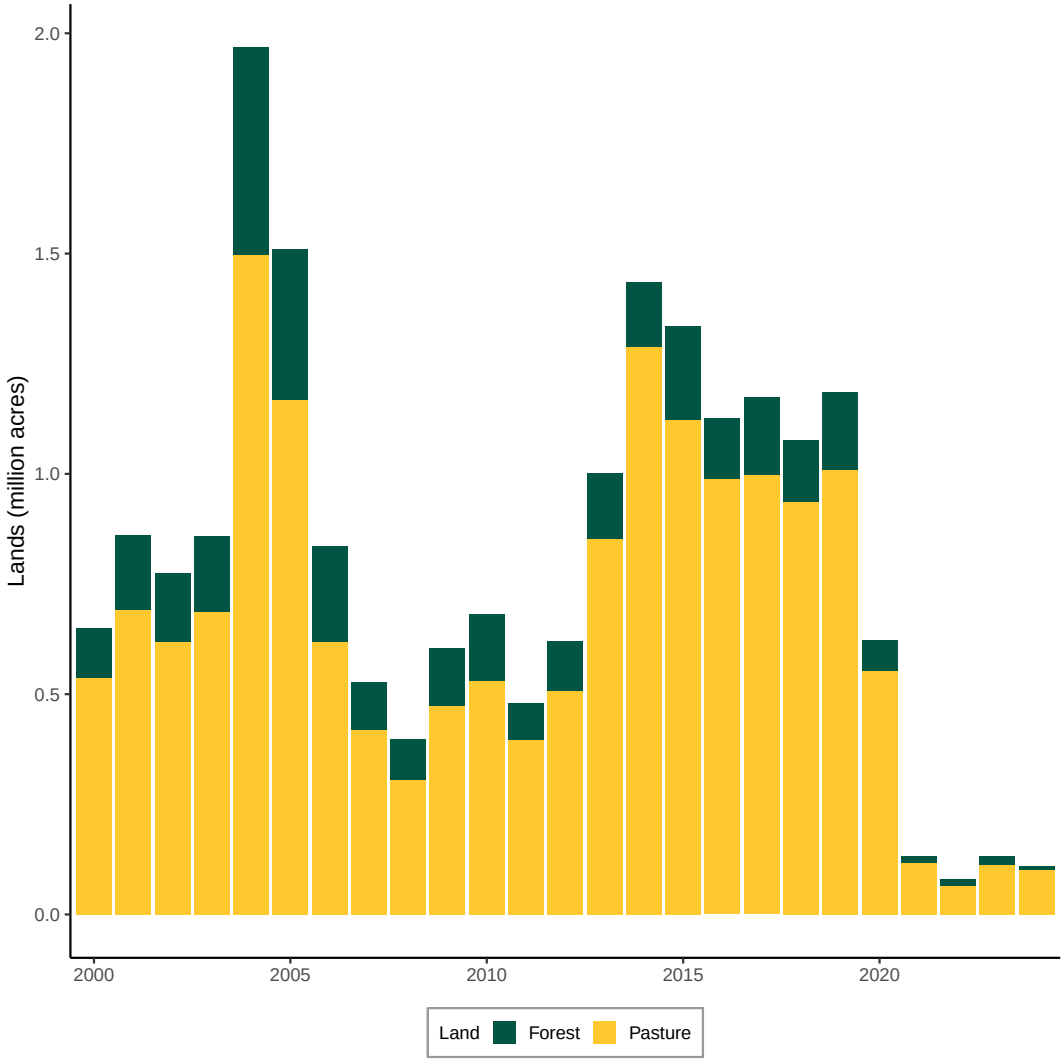
Source: Authors' calculations using MapBiomas Project (2025).

The future expansion of double cropping is primarily shaped by weather conditions and market demand. A substantial body of literature shows that, under higher expected temperatures and more frequent extreme weather events, planting dates in Brazil are likely to be delayed and yields per acre decline (Bigolin and Talamini, 2024; Hampf et al., 2020; Pires et al., 2016). Such shifts in planting timing constrain double-cropping systems, as delays in soybean planting increase the exposure of safrinha and other winter crops to drought risk. How farmers adjust land-use decisions in response to these weather conditions depends critically on the prices they receive. Current market demand for maize is strong both domestically and internationally, driven in part by rapidly growing demand for ethanol. Soybean demand, by contrast, has been driven primarily by China and may slow over in the next few years (Bouratoglou et al., 2025). In the medium to long run, maize producers may increasingly choose to maintain corn production rather than expand double-cropping systems.

The major driver of soybean/corn external land expansion for the past two decades has been the conversion of degraded pasture lands, which may continue along the trend. Many of those pasture lands were originally created through earlier waves of deforestation. The initial phase of this conversion occurred in Mato Grosso and was driven by rising soybean profitability, as documented by Macedo et al., 2012 . Subsequent substantial pasture conversion, especially to soybean production, has been shaped by policy incentives that promote agricultural intensification. As shown in Figure 2, the second major spike in pasture conversion occurred shortly after the introduction of the 2011 plan for low-carbon agriculture, known as Plano ABC, which aims to support the recovery of degraded pastures. Public credit programs, such as the Plano Safra RenovAgro line for low carbon agriculture, further encourage this transition by providing subsidized credit. As of 2024, the direct pasture to soybean conversion accounts for about 32.6% annual soybean expansion on average.

This conversion is expected to continue, although at a slower pace. Pasture lands that are likely to degrade in the near future and that hold good economic potential for crop cultivation are estimated to be between 25.7 and 68.4 million acres in 2023, according to Bolfe et al., 2024. Further expansion may also be supported by ongoing improvements to transport infrastructure. The paving of BR 163 and the development of the Arco Norte corridor have significantly improved access to the MATOPIBA frontier. In recent years, land conversion has also increased in Maranhão and Rondônia, where new ports and road connections have been completed. Figure 2 shows a clear slowdown in land conversion after 2020. Continued expansion may be constrained by limited road connectivity, insufficient local warehouse investment, and reduced policy support. Historically, the expansion from deforestation has also been significant (Ferreira Filho and Hanusch, 2022; Carreira et al., 2024), but this source of growth is now quickly diminishing, as seen in Figure 2.

Figure 2: ***Brazilian Land Conversion: Pasture to Soybean Croplands.***



Source: Authors' calculations using MapBiomas Project (2025).

Year-by-year land-use tracking shows that direct forest-to-soybean conversion accounts for only about 7.2% of annual expansion, on average. Most of the forest-to-soybean transitions occurred indirectly: forests are first converted to pasture or other crops, after which these lands are subsequently converted for soybean production. In the past 2 years, deforestation rates have fallen markedly following the change in national leadership. Stronger enforcement of the Brazilian Forest Code, which made most forms of deforestation illegal, has increased the effectiveness of the law compared with conditions before 2023. Additional policy support has also been implemented. This process of sustainable intensification has been further strengthened by the adoption of Integrated Crop Livestock Forestry systems, which increase yields without requiring new deforestation. At the same time, the Amazon Soy Moratorium has remained highly

effective in preventing deforestation in the Amazon. Brazil's new environmental commitments, which aim to achieve a zero net deforestation rate by 2030, could place additional constraints on future cropland expansion.

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The Agricultural Risk Policy Center at North Dakota State University conducts independent, evidence-based economic research to inform agricultural policy and strengthen the U.S. farm safety net. The Center's work focuses on evaluating risk management tools such as crop insurance and disaster assistance, analyzing market disruptions, and providing timely insights that support producers, policymakers, and industry leaders.

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