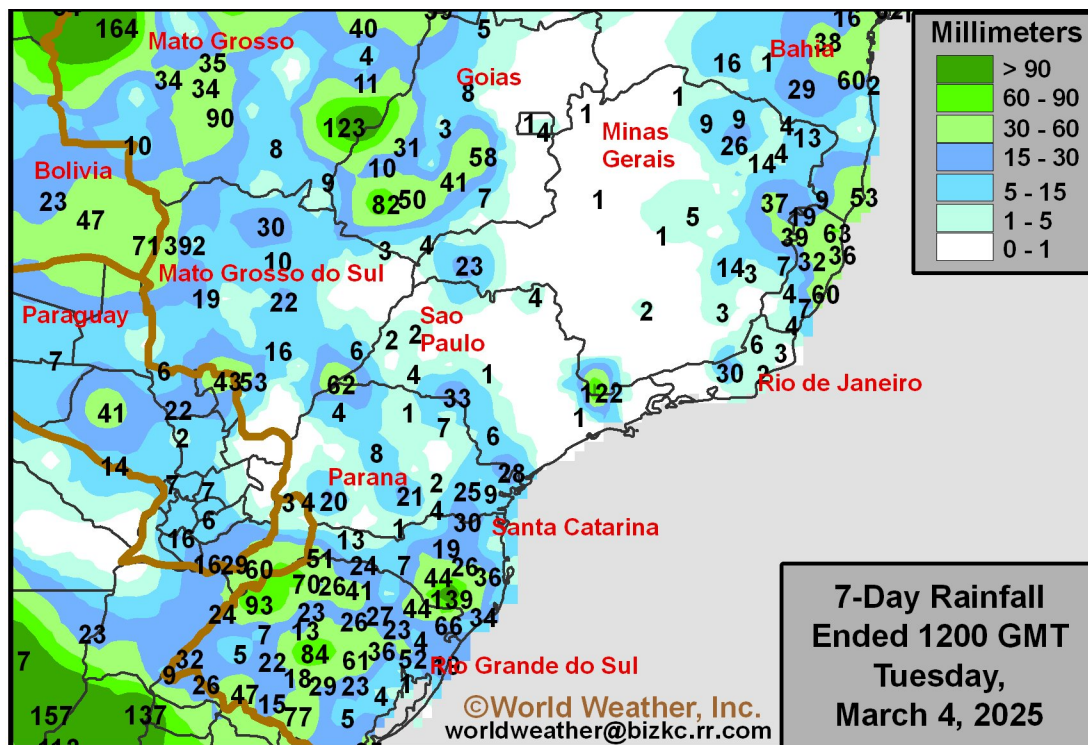


Brazil Limited Rain Favors Fieldwork; Coffee Needs Rain

By Andrew Owen and Drew Lerner

Kansas City, March 4 (World Weather Inc.) – Soybean harvesting continued to make significant progress during the past week as several locations from Parana and Sao Paulo into Minas Gerais missed out on rain. The harvest is now slightly ahead of last year's pace while safrinha corn planting lags a little behind last year's pace. Center-west Brazil generally received enough rain to support good safrinha corn establishment, most notably Mato Grosso, although enough rain did fall to slow late planting. Less-than-usual rainfall is slated for much of Brazil during the coming week. Far southern and center-west Brazil will still see periods of rain that will limit drying. Harvesting should continue swiftly, even in areas that receive rain. The main safrinha corn areas in center-west Brazil will have enough moisture for establishment as well, though drying is needed to get the remaining crop planted. Coffee areas are most in need of rain and relief is nearly ten days away.

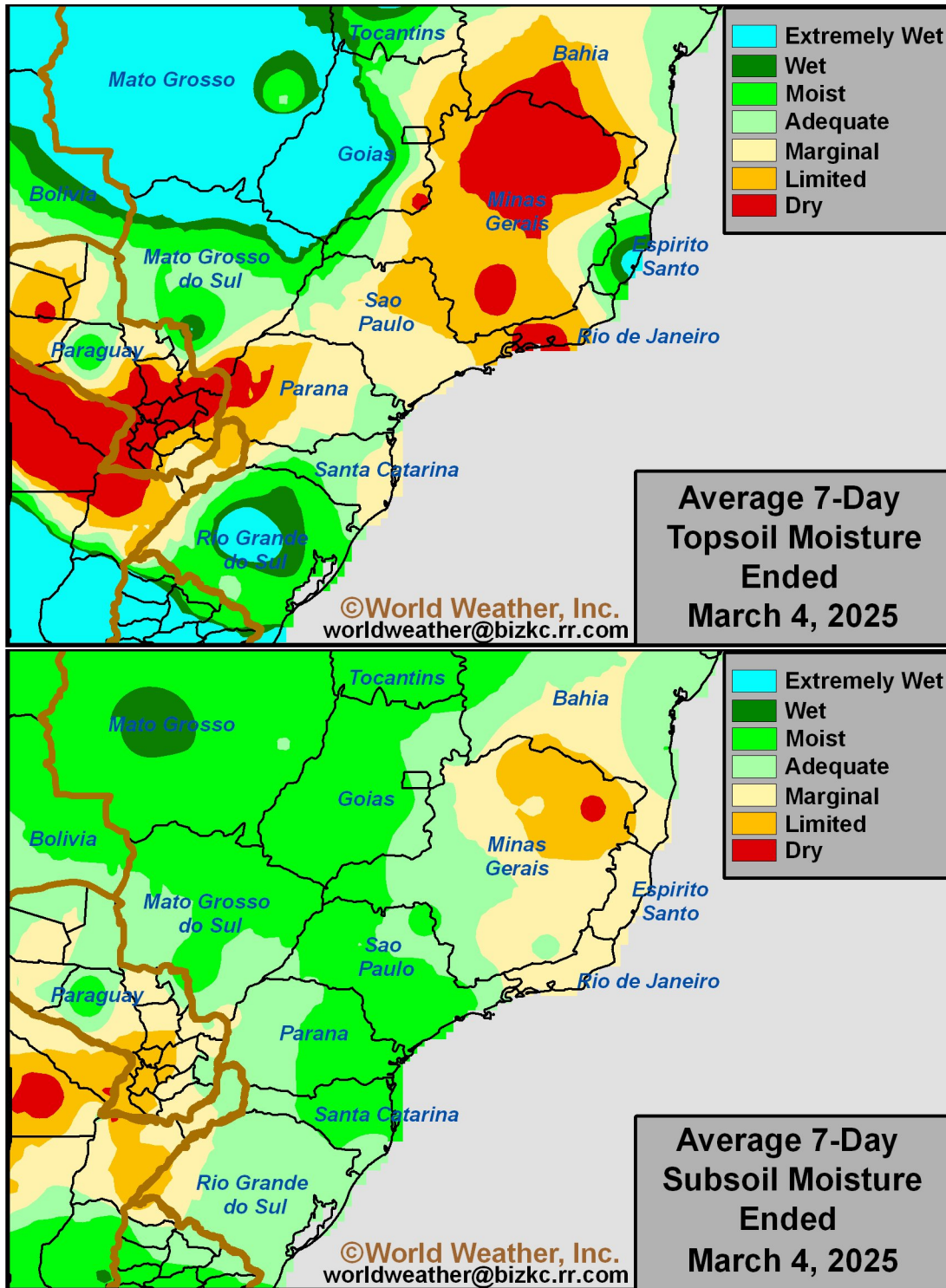
Rainfall varied across the main production areas in Brazil during the past week. Mato Grosso and Rio Grande do Sul received 0.43 to 1.93 inches of rain with local amounts up to 4.45 inches for the seven-day period ending this morning. Goias, Mato Grosso do Sul, Santa Catarina, eastern Parana, Espirito Santo, and southeastern Bahia received 0.51 to 2.28 inches of rain, though several pockets did not receive enough rain to counter evaporation. Northeastern Bahia received 0.25 to 1.02 inches of moisture. Little to no rain was noted elsewhere.



Temperatures this past week were near or slightly above normal with highest readings in the upper 80s and 90s Fahrenheit. Pockets in Rio Grande do Sul also warmed above 100 degrees. Lowest readings were in the 60s and 70s.

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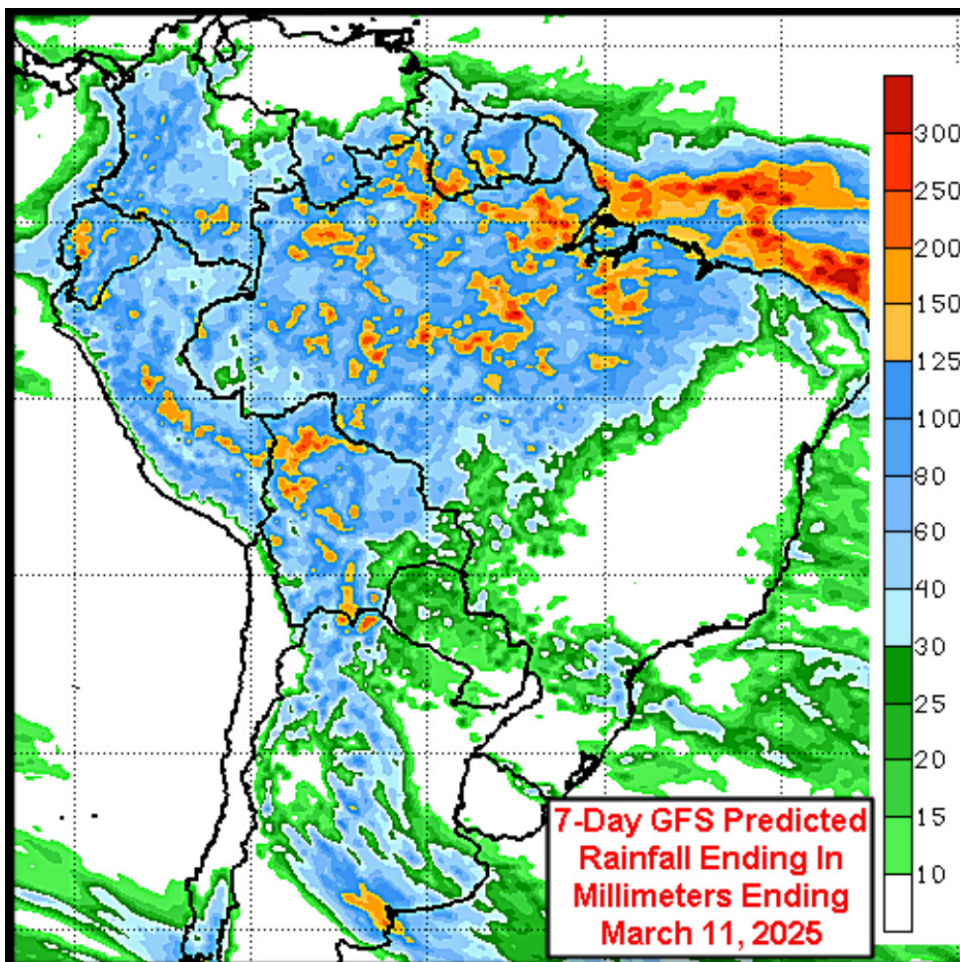
Soil moisture is rated adequate to excessive in much of center-west Brazil, Rio Grande do Sul, and Santa Catarina. Other locations have adequate or marginally adequate amounts of moisture, though many areas in Minas Gerais, southern Bahia, western Parana, and neighboring locations have a significant shortage of topsoil moisture.



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Significant harvest progress was again made across Brazil during the past week. As of March 2, soybean harvesting was 48.4% complete, up from 36.4% the previous week and up slightly from 47.3% this time last year. First-season corn harvesting was 25.3% complete, down from 29.4% this time last year. Dry bean harvesting was 56.4% finished while rice harvesting was 14.2% complete - both up from this time last year. *The lack of abundant rainfall was welcome as producers were struggling to harvest aggressively earlier in February due to rain.*

Safrinha corn planting is also ongoing as the soybeans come out of the ground. As of March 2, 69.6% of the safrinha corn was planted, down from 73.7% this time last year. Mato Grosso (the nation's most important Safrinha corn producing state) was 82% planted compared to 93% last year. *The lack of rain has also been favorable for more aggressive planting. However, concern has been increasing over net drying in some areas.* Additional drying may impact establishment and early-season development.



WEATHER OUTLOOK

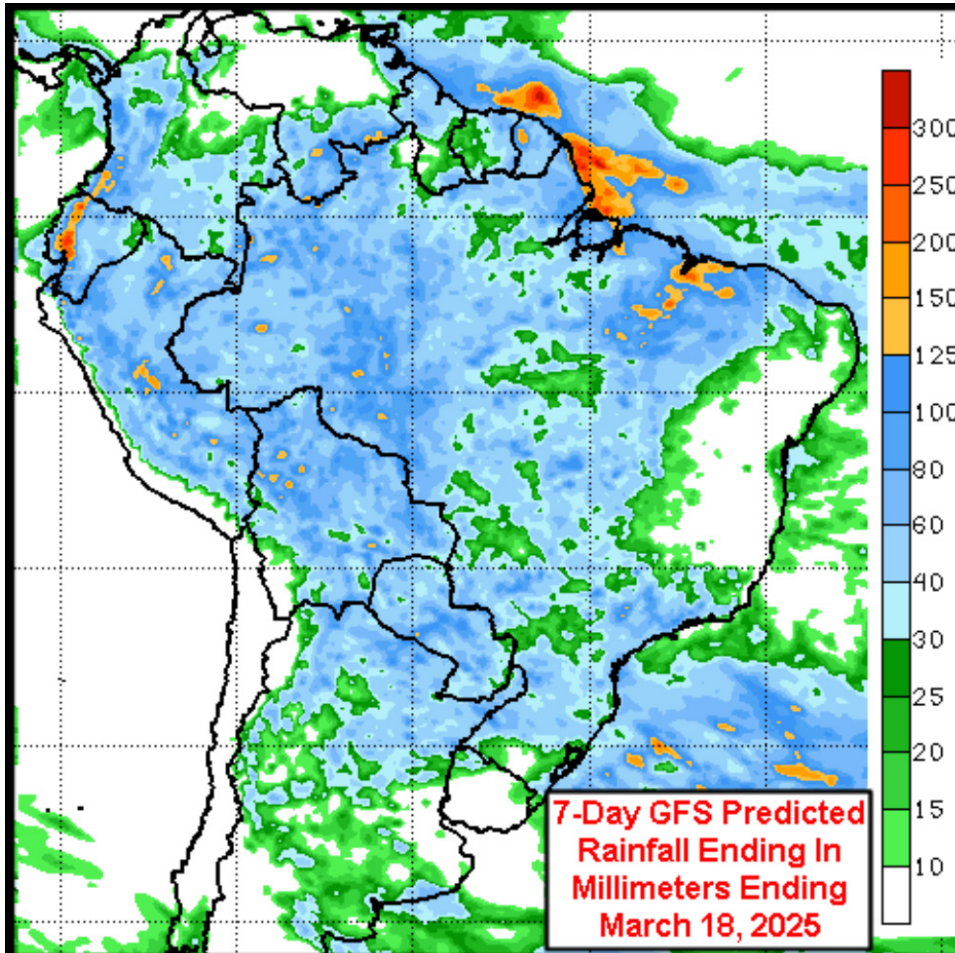
A large section of Brazil will trend drier than usual during the coming week.

Southern and center-west Brazil into portions of Sao Paulo will still have several opportunities for erratic rain despite the drier than normal environment. Moisture totals by next Tuesday morning will range from 0.25 to 1.50 inches with local amounts of 2.50 inches

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or slightly more. The remaining production areas in Brazil will be dry or not receive enough rain to counter evaporation. More widespread and significant rain is slated for much of Brazil's main production areas March 12 – 18.

Temperatures will trend near or slightly above normal for much of Brazil through next Tuesday. Daytime highs will peak to the 80s and 90s most often with many areas in southern Brazil only warming to the 70s later this weekend and early next week following a frontal boundary. Nighttime lows will be in the 60s and 70s with portions of southern Brazil cooling to the 50s Sunday and early next week. Seasonable to seasonably cool weather is slated for much of crop country March 12 – 18.



Aggressive soybean, first-season corn and other crop harvesting will continue during the coming week due to the lack of rain. Minor harvest delays will still be possible in the wettest locations of southern and center-west Brazil. Safrinha corn planting will also advance well around periodic shower and thunderstorm activity. Most production areas outside of Mato Grosso will potentially become a little too dry for ideal establishment and early-season growth; however, rainfall during the second week will bring an opportunity for improvement.

Most computer forecast model runs have been suggesting rain will develop in much of southern and portions of center west Brazil March 12-18. During that period of time rain should fall in most areas outside of Minas Gerais, Bahia and immediate neighboring areas.

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That moisture will be extremely important and should be sufficient to moisten the topsoil in a timely manner to maintain a favorable crop development and field working environment.

COFFEE AND SUGARCANE INTERESTS

Coffee and sugarcane as well as some cotton and minor corn, soybean, rice and citrus production areas of Minas Gerais and Bahia have been driest for the longest period of time. Crops in these areas, especially from northern Minas Gerais into interior Bahia have been driest for the longest period of time. However, parts of northern Sul de Minas, Cerrado Mineiro and Zona da Mata coffee areas have also been drying out and crop moisture stress is under way.

The stressful conditions have been persistent enough to raise concern over coffee cherry quality and size. However, this situation does not appear to be quite as serious as that of several years ago when a similar bout of dry and hot weather occurred in January, February and early March. This bout of crop moisture stress and warm weather has not been as severe, but in that episode many coffee production areas reported empty and deformed cherries, smaller cherry sizes and a general quality decline. This year's dryness has not been as prolonged and the temperatures not nearly as hot, but nonetheless there has been some negative impact.

Sugarcane may not be seriously hurt, despite shorter cane heights and reduced tonnage due to high sucrose values resulting from the more stressed environment.

Timely rain advertised for March 12-18 is extremely important to all grain and oilseed crops, but also to coffee, sugarcane, citrus, rice, corn, cotton and soybeans. A close watch on the precipitation distribution is warranted – not only March 12-18, but through the middle of April before the rainy season ends. A poor finish to the monsoon season could lead to low soil moisture that will threaten Safrinha and other late season crop production, but it might also harm sugarcane and coffee production.

Rain expected March 12-18 will bring some temporary relief, although World Weather, Inc. predicts the rain will still be lighter than usual.

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