

PLACE YOUR TRADES SPACES **HOSTED BY CHIGRL**

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# PLACE YOUR TRADES

## KEY TAKEAWAYS

**PLACE YOUR TRADES**

### US AND EU AGRICULTURE POLICIES

06.07 @ 11am EST

**Special Guests:** Ralph Schoellhammer,  
Angie Setzer and Garrett Toay



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FULL EPISODE**



# CHIGRL'S KEY TAKEAWAYS

- Sustainable Aviation Fuel is not feasible at this point on a cost basis, but burning food for fuel is not an issue in the US
- Fertilizer prices have come down considerably, but fertilizer plants in Europe that shut down during summer of 2022 during the energy crisis have not fully recovered
- Nuclear energy could be used to produce ammonium needed for fertilizer, by passing natural gas, but Europe has chosen to ignore this with Germany shutting all nuclear facilities
- Brazil crops have been highly successful. This will impact global corn and wheat prices as these hit the spot market even though US is seeing some drought which may or may not impact prices (too soon to tell)
- Angie calls this “watermelon through a water hose” meaning a lot of product is coming to the spot market that has top filter in
- Ukraine grain production is falling at a rapid pace. Even before the Russian invasion, destruction of crops during this war, jeopardizes this further. They will be less of a force on the global market
- Best places to look if you are an investor in this industry? Overwhelmingly all said technology:
  - Automation
  - Drones
  - Seed technology (given the weather conditions today in the US things would have looked a lot worse had it not been for seed technology)

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