



Vegetables and Pulses Outlook: July 2026

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Pulse and Potato Plantings Lose Ground in 2026

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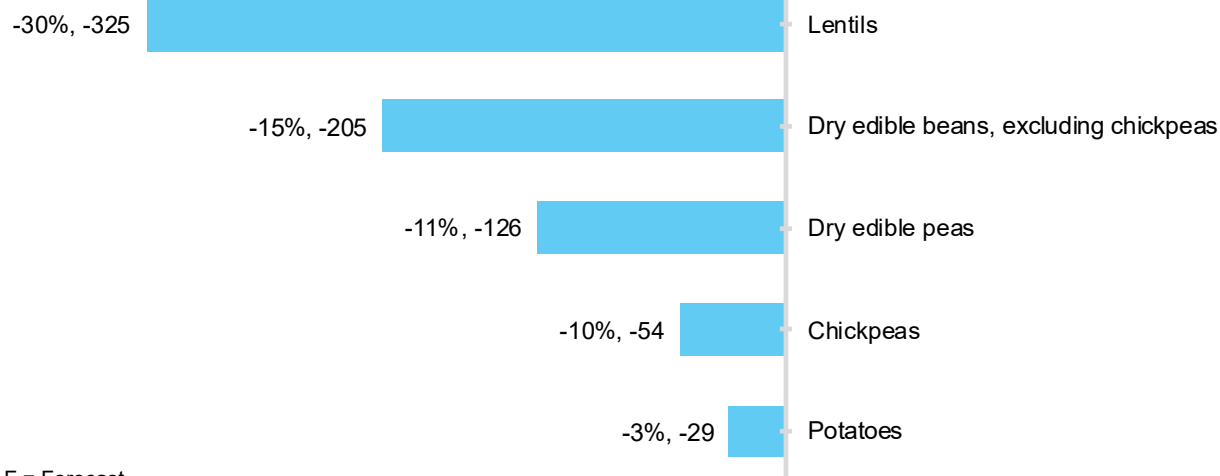
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[Data tables (A1–B6) are available in separate Excel file.]

USDA, National Agricultural Statistics Service (NASS) estimates indicate planted area in 2026 will be lower than a year earlier for each of the four major pulse crops and potatoes. Planted acreage declined by 739,000 acres from 2025, with lentils and dry beans accounting for nearly three-fourths of the reduction. The decline is also geographically concentrated among major producing States. Lower lentil, dry pea, and chickpea acreage in Montana and lower dry bean, dry pea, and lentil acreage in North Dakota account for much of the pulse contraction, while Idaho accounts for about half the reduction in potato acreage. These reductions follow expanded pulse acreage in 2025 and mark the third consecutive annual decline in potato plantings.

Planted acreage declines across pulse crops and potatoes, 2025–26F

Percent change from the previous year, change in thousand acres



F = Forecast.

Source: USDA, Economic Research Service using data from USDA, National Agricultural Statistics Service, *Acreage* (June 2026).

Industry Overview

This issue focuses exclusively on potatoes and pulse crops. Figures 1 and 2 offer industry snapshots for potatoes and pulses, respectively.

Potatoes: The USDA, National Agricultural Statistics Service (NASS) 2026 potato planted acreage forecast in the top 13 potato-producing States is 873,000 acres, a 3-percent reduction from 2025. On June 1, 2026, potato stocks were 2 percent lower compared to the same month last year and the smallest inventory since 2014. The USDA, Economic Research Service (ERS) preliminary per capita availability of potatoes for calendar year 2025 is 112 pounds per person (fresh-weight basis), down 2 percent from 2024.

Dry beans: U.S. dry bean planted area, excluding chickpeas, is estimated at 1.16 million acres in 2026, down 15 percent from 2025, with North Dakota accounting for most of the national decline. Through May, exports declined 29 percent, driven by lower shipments to Mexico, while imports fell 16 percent, narrowing the U.S. net export position. Grower prices remained below prior-year levels in the 2025/26 marketing year to date, and preliminary per capita availability declined from 2024 to 6.3 pounds in 2025.

Chickpeas: U.S. chickpea planted area is estimated at 482,000 acres in 2026, down 10 percent following expansion in 2025, with the largest acreage reductions in Montana, followed by Washington, and Idaho. Chickpea net trade during September 2025–May 2026 was nearly unchanged from the same period a year ago, as exports and imports both increased modestly. Pakistan accounted for a larger share of U.S. exports than a year earlier, while Canada supplied a larger share of U.S. imports. Grower prices remained below prior-year levels in the 2025/26 marketing year to date, while preliminary per capita availability increased 9 percent from 2024 to 1.4 pounds in 2025.

Dry peas and lentils: Dry pea planted area is estimated at 1.05 million acres in 2026, down 11 percent, while lentil area declined 30 percent to 747,000 acres. Most of these reductions occurred in Montana and North Dakota, the two largest producing States for both crops. Combined exports fell 58 percent during July 2025–May 2026 from the previous year, sharply narrowing the U.S. net export position amid larger Canadian supplies and weaker shipments to selected markets. Grower prices remained below prior-year levels in the 2025/26 marketing year to date, while preliminary 2025 per capita availability increased sharply for both crops, increasing by about two-thirds for dry peas and more than doubling for lentils.

Figure 1

Potatoes in perspective: Annual industry snapshot, 2016–25

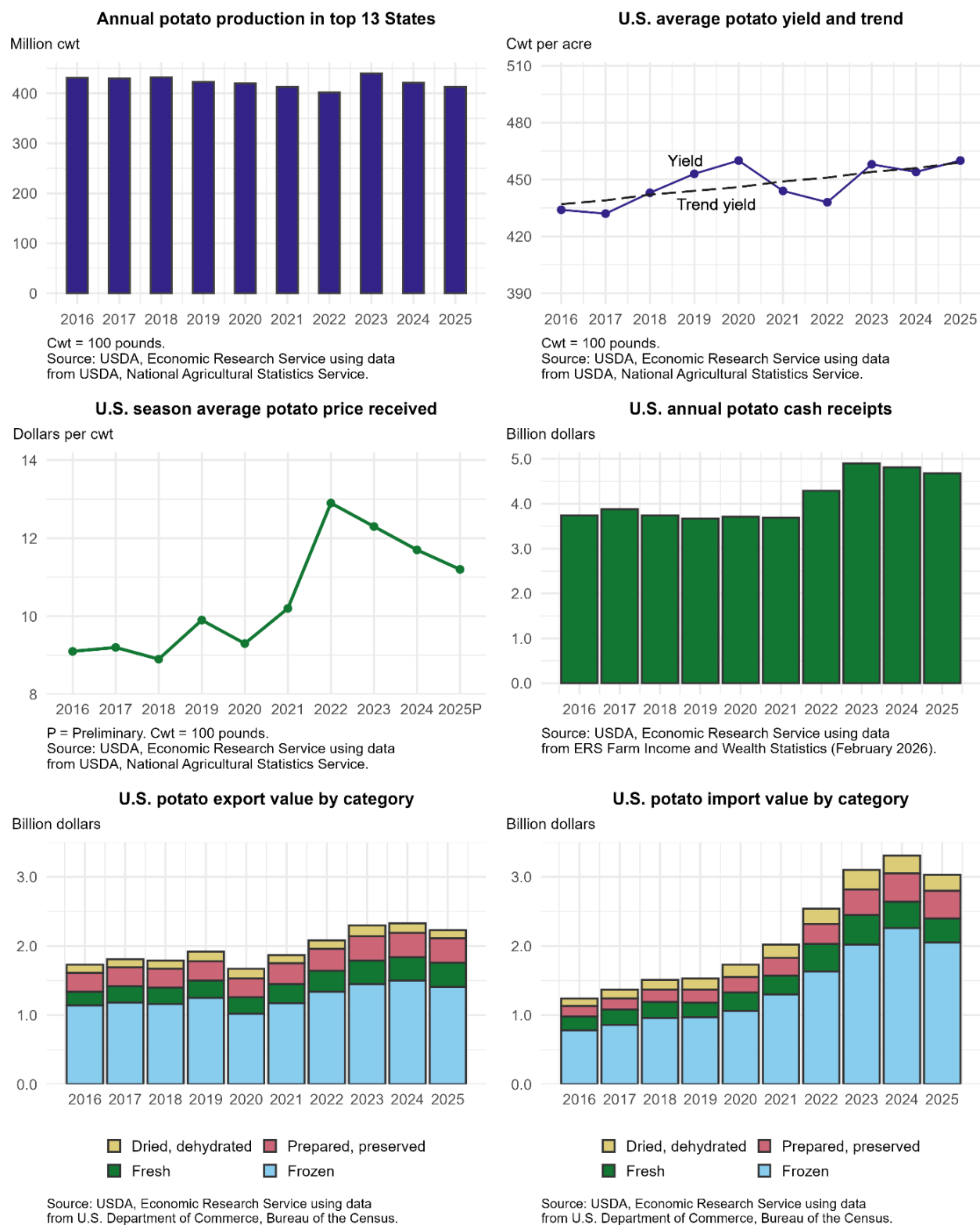
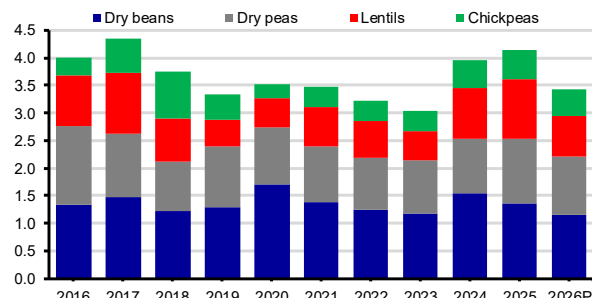


Figure 2

Pulses in perspective: Calendar-year industry snapshot, 2016–2025 and 2026 for planted acres

U.S. pulse planted acres

Acres, million

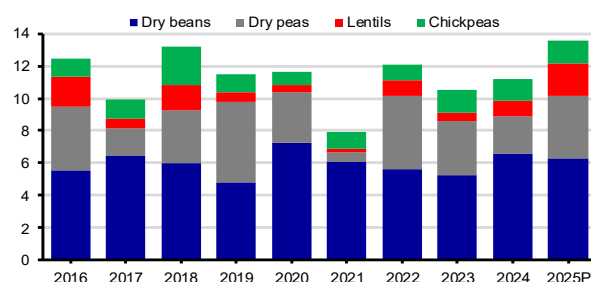


Note: P = preliminary. Dry pea estimates prior to 2019 include Austrian peas. Beginning in 2024, dry pea estimates for South Dakota were discontinued.

Source: USDA, Economic Research Service using data from USDA, National Agricultural Statistics Service, *QuickStats*.

U.S. pulse per capita availability

Pounds

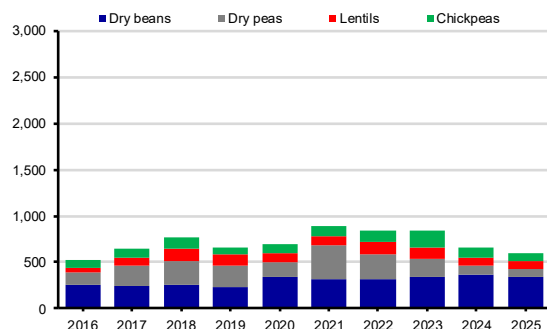


Note: P = preliminary.

Source: USDA, Economic Research Service using data from U.S. Department of Commerce, Bureau of the Census and USDA, National Agricultural Statistics Service.

U.S. pulse calendar year imports

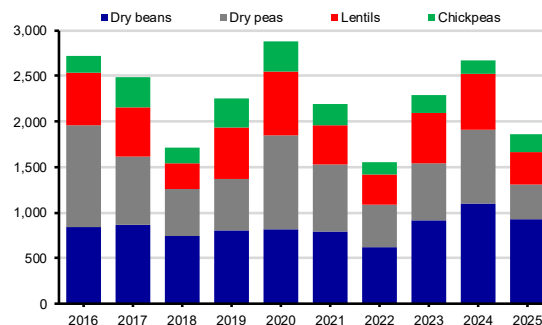
Million pounds



Source: USDA, Economic Research Service using data from U.S. Department of Commerce, Bureau of the Census.

U.S. pulse calendar year exports

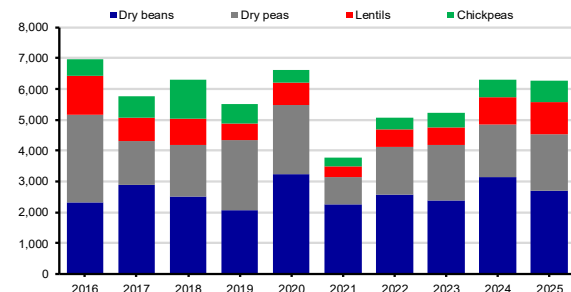
Million pounds



Source: USDA, Economic Research Service using data from U.S. Department of Commerce, Bureau of the Census.

U.S. pulse production

Million pounds

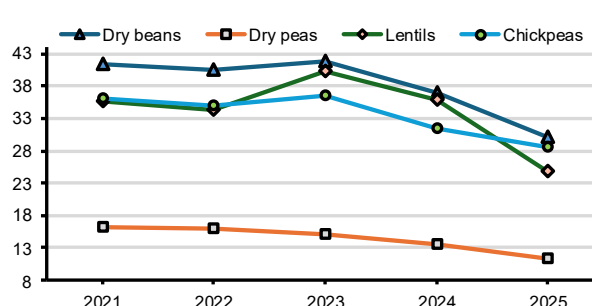


Note: Dry pea estimates prior to 2019 include Austrian peas. Beginning in 2024, dry pea estimates for South Dakota were discontinued.

Source: USDA, Economic Research Service using data from USDA, National Agricultural Statistics Service, *QuickStats*.

U.S. pulse annual prices received

Dollars per cwt



Note: Annual prices received are reported by marketing year. Cwt = 100 pounds.

Source: USDA, Economic Research Service using data from USDA, National Agricultural Statistics Service, *QuickStats*.

Potatoes

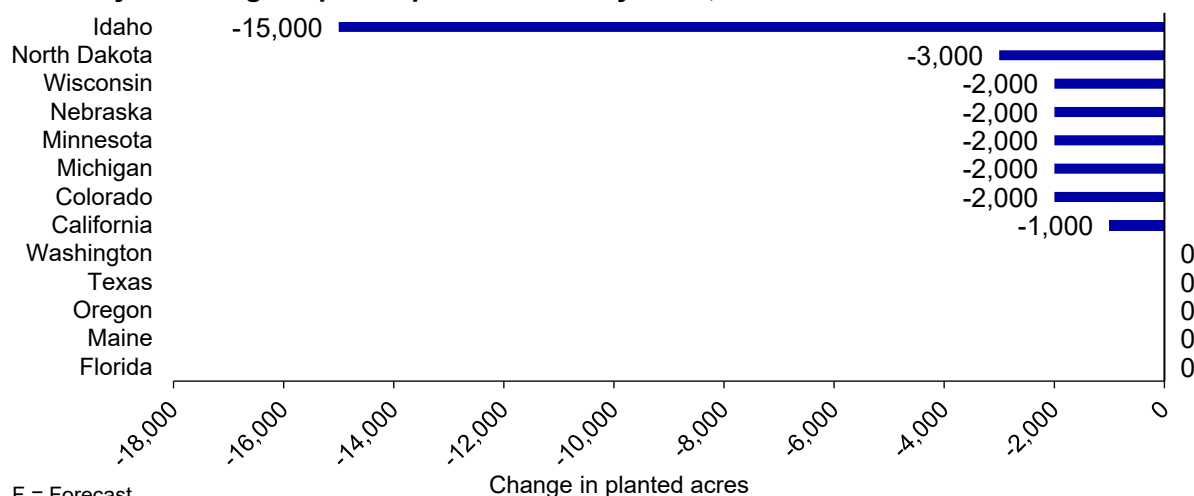
Acreage Forecast Down For Third Year in a Row

The USDA, National Agricultural Statistics Service's (NASS) June *Acreage* forecast for 2026 potato planted acres is 873,000 acres, a 3-percent reduction from last season (down 29,000 acres). If realized, 2026 potato planted area in the 13 NASS-surveyed States¹ would fall to its lowest level since 1952, marking a third consecutive year of reduced acreage. One factor contributing to the projected reduction in 2026 is lower prices received by potato producers during the 2025/26 marketing year.

The 2026 planted acres forecast is lower year over year in 8 of the 13 surveyed States (figure 3). About half of this season's reduction is expected in Idaho (down 15,000 acres). Excluding Idaho, State-level acreage reductions this year range from 1,000 (California) to 3,000 acres (North Dakota), with the largest percentage decrease occurring in Nebraska (where acreage dropped 10 percent from 2025). After reductions in acreage in 2025, planted area is flat year to year in Washington, Oregon, Maine, and Florida in 2026. Planted area in Texas is also forecast to remain steady, totaling 15,000 acres for the sixth consecutive year.

Figure 3

Year-to-year change in potato planted acres by State, 2025–26F



F = Forecast.

Source: USDA, Economic Research Service based on data from USDA, National Agricultural Statistics Service, *Acreage* (June 2026).

The 2026 USDA, NASS *Acreage* report estimates that 867,600 of the 873,000 planted acres will be harvested, reflecting an average abandonment rate of 0.6 percent. Assuming this estimate is realized, even modest yield changes could affect the 2026 supply outlook. The 2025 U.S. average yield increased 1 percent from the prior year to 460 hundredweight (cwt) per acre, tying

¹ The 13 NASS-surveyed States for potatoes include California, Colorado, Florida, Idaho, Maine, Michigan, Minnesota, Nebraska, North Dakota, Oregon, Texas, Washington, and Wisconsin.

the record high set in 2020. If the U.S. average yield fell slightly this season to match the 3-year average of 457 cwt per acre, production would decline about 4 percent—from 412.86 million cwt in 2025 to 396.78 million cwt in 2026. However, if yields instead rose 1 percent to align with the 20-year trend of 465 cwt per acre, production would fall by about 2 percent to 403.4 million cwt.

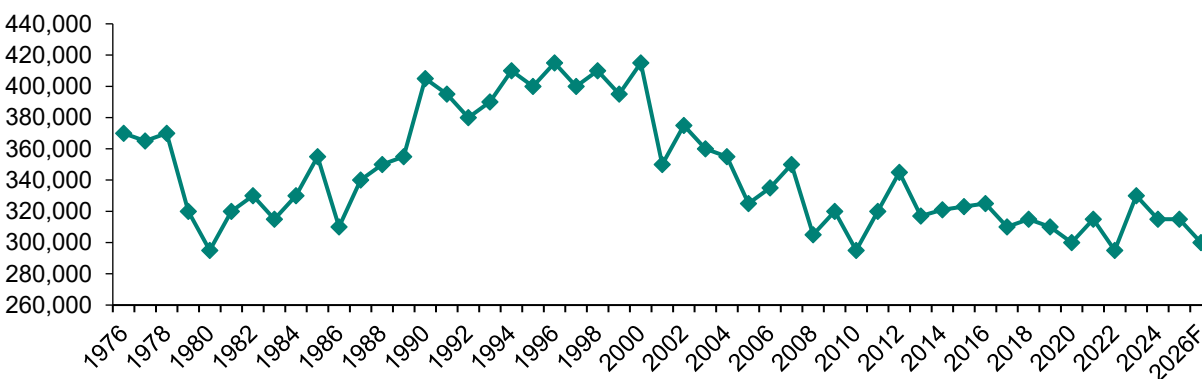
ERS expects U.S. potato yields in 2026 to be near trendline, supported by generally favorable growing conditions across major producing States. Although a trendline yield would represent a new record high, the increase would not offset the anticipated decline in harvested acreage. As a result, ERS projects total production will decline year over year, tightening supplies and placing upward pressure on prices, particularly in the fresh market. The magnitude of price impacts for producers and consumers will depend on the extent of the expected supply contraction during the 2026/27 marketing year (September–August). USDA will release its preliminary 2026 potato production forecast in the NASS November *Crop Production* report.

Eye on Idaho potatoes: Idaho potato producers are forecast to plant 300,000 acres of potatoes in 2026, accounting for 34 percent of the U.S. total. The USDA, NASS forecast is 5 percent lower than the 315,000 acres planted in both 2024 and 2025. In the last 50 years, potato acreage in Idaho has only fallen below 300,000 acres three times (1980, 2010, and 2022) (figure 4). During June 2026, the Idaho Potato Commission (IPC) also released a potato planted acreage estimate (298,915 acres), which is about half a percent below the current USDA, NASS forecast.

Figure 4

Idaho potato planted acres from 1976 to 2026F

Planted acres



F = Forecast.

Source: USDA, Economic Research Service based on data from USDA, National Agricultural Statistics Service, *Acreage* (June 2026).

Idaho seed potato acreage is expected lower: IPC estimates that roughly 10 percent of Idaho's potato acres (29,300 acres) in 2026 are designated for seed production, about 2,000 acres fewer than in 2025. Idaho continues to lead the Nation in certified seed potato production,

with most acreage devoted to Russet-type varieties.² Last year, Russet varieties made up about 75 percent of the State's certified seed acres, two-thirds of which were either Burbank or Norkotah cultivars. Other States planting more than 10,000 acres of certified seed potatoes during the previous crop year included North Dakota and Montana, according to Colorado State University's *2025 USA Acreage Accepted* report. Combined, Idaho, North Dakota, and Montana accounted for 55 percent of certified seed acreage in 2025 based on data from 17 different States.

Taking Stock of the 2025/26 Potato Marketing Year

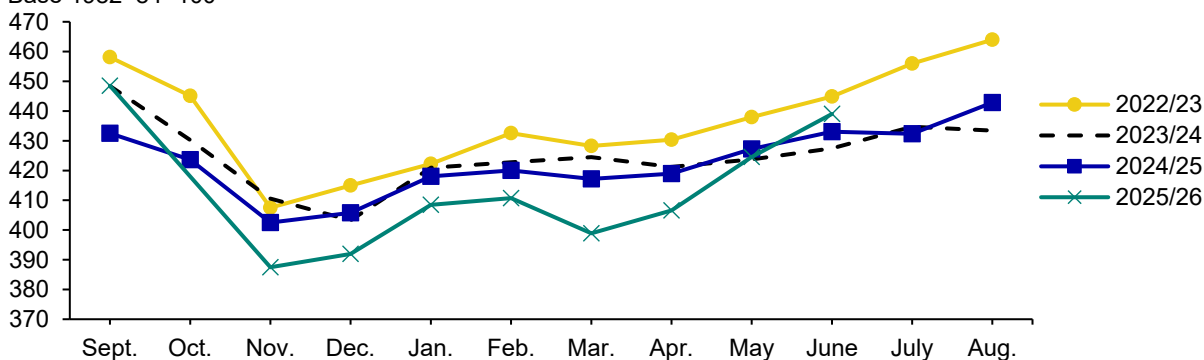
The USDA, NASS preliminary 2025/26 season-average price is \$11.20 per cwt, marking the third consecutive season of lower average prices received for U.S. producers. USDA, NASS reported that monthly grower prices for fresh potatoes in 2025/26 remained below \$10 per cwt with monthly prices this season (September 2025–May 2026) trailing last season by \$1.5 to \$3.4 per cwt each month. The breakeven price for fresh potato producers varies according to several State-level extension cost studies and industry reports, but lower prices for the 2025/26 crop compared to 2024/25 indicate lower average returns for growers. Lower prices received in 2025/26 are a contributing factor to the projected acreage reduction in 2026.

Potato prices are trending higher this summer: Average fresh potato retail prices, reflected by the Bureau of Labor Statistics (BLS) Potato Consumer Price Index (CPI), were also lower during most of 2025/26. Between November 2025 and April 2026, the Potato CPI trailed behind the previous three seasons (figure 5). However, fresh potato prices have begun to move upward for producers and consumers in recent months. USDA, NASS fresh potato grower prices rose 20 percent month over month in May 2026, and USDA, AMS free-on-board (FOB) shipping-

Figure 5

Potato CPI in 2025/26 trending higher this summer after falling to 3-season low

Base 1982–84=100



CPI = Consumer Price Index.

Source: USDA, Economic Research Service using data from and U.S. Department of Labor, Bureau of Labor Statistics.

² Based on data from the *2025 Certified Seed Potato Acreage (by variety)* report (September 19, 2025) published by the Idaho Crop Improvement Association, Inc.

point prices indicate prices continued to rise in June and July. The Potato CPI has also trended higher, rising month-over-month in April (up 1.9 percent), May (up 4.4 percent), and June of 2026 (up 3.4 percent). These increases resulted in the June 2026 Potato CPI ranking higher than the same month in the previous two seasons (up 1 and 3 percent, respectively).

The recent increase in potato prices partly reflects the typical seasonal pattern during the summer as the market transitions between the storage supplies harvested last year and new crop harvest. If potato retail prices follow previous marketing year patterns, they are likely to increase slightly in July and August until new crop supplies become readily available. Lower-than-average potatoes in storage during June 2026 and reduced winter/spring planted acreage are also supporting elevated prices this summer.

Storage potatoes inventories were lower in June: Potatoes held in storage include processor holdings (unprocessed fresh potatoes) and most of the seed used to plant the following year's crop. Because growers in most major potato-producing States plant in the spring and harvest in the fall, storage volumes increase post-harvest and gradually decline into the following summer as the crop is utilized or becomes unmarketable because of shrinkage and loss. On June 1, 2026, potatoes in storage totaled 54.7 million cwt, representing 13 percent of the remaining 2025 crop according to the NASS *Potato Stocks* report. June storage volume was 2 percent lower than last year and 13 percent lower than two years ago.

Idaho accounted for 37 percent of potatoes in storage (20 million cwt) on June 1, 2026, based on 13 NASS-surveyed States, down 9 percent from last year and the smallest for that period since 2014. Lower than average inventories in Idaho may reflect the higher-than-average fresh potato shipments and processing usage this season. Despite prices remaining lower than last year, the warmer-than-average winter and spring storage season may have influenced producers to reduce inventory at a faster pace to avoid additional late-season losses. Warmer temperatures during storage can accelerate shrinkage, degrade quality, and lower pack-out rates (the ratio of marketable potatoes to harvested potatoes).

Processed volume is higher than last season: In 2025/26, processors used 192.2 million cwt of potatoes through May 31, 2026, based on 8 NASS-surveyed States.³ Season-to-date 2025/26 processed potato volumes through May 31 were up 4 percent from last season but 1 percent lower than two seasons ago. Two-thirds of processed potato volume occurred in Idaho or Washington, a similar share to last season. During 2025/26, monthly processed volumes

³ The eight States reported by USDA, NASS (*Potato Stocks*) for potatoes used for processing include Colorado, Idaho, Maine, Minnesota, North Dakota, Oregon, Washington, and Wisconsin. Processing quantity represents potatoes used for processing regardless of the State in which the potatoes were produced.

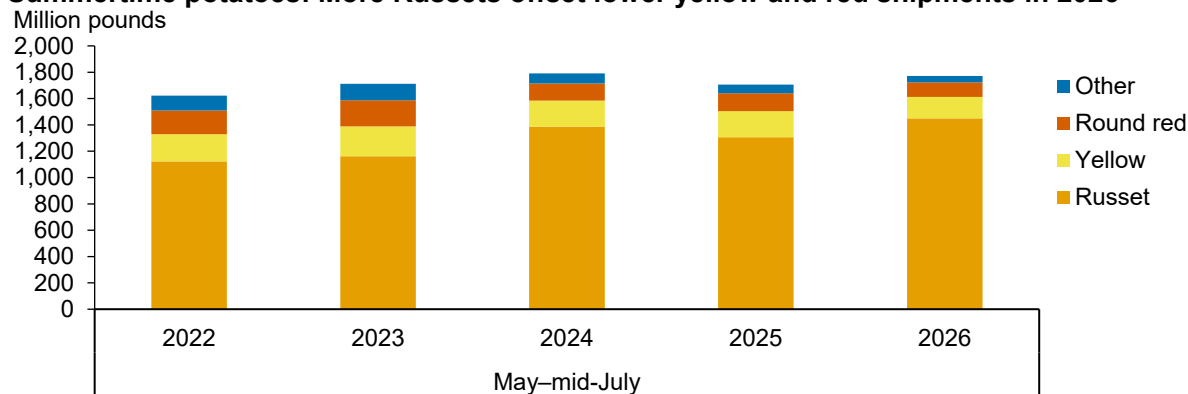
from December through May ranged from 18.2 to 20.7 million cwt compared to 16.8 to 19.3 million cwt in 2024/25.

The increase in processing volume has led to more frozen potato products in cold storage. Frozen french fry inventories rose each month from January through March 2026. On March 31, 2026, stocks reached 1.07 billion pounds—the highest of any month since March 2020, when foodservice demand dropped at the onset of the Coronavirus (COVID-19) pandemic. On June 30, 2026, frozen french fry inventories totaled 1 billion pounds, a decrease of 6 percent from the March high. Total frozen potatoes in cold storage (including french fries) on June 30, 2026, was 1.27 billion pounds, up 4 percent from the same month a year ago.

2026 summer Russet potato shipments are higher: Domestic fresh potato (table stock) shipment volumes from May–mid-July 2026 (weeks 19–29) were 4 percent higher than last year but 1-percent below the same period in 2024 (figure 6). Higher summer shipment volumes this year were driven by an increased volume of Russet potatoes (up 11 percent), which more than offset double-digit percentage declines in smaller categories like yellow and round red (each down 18 percent, respectively). During the May–mid-July 2026 period, Russet potatoes shipments totaled 1.45 billion pounds with Idaho accounting for 52 percent (747 million pounds) of volume.

Figure 6

Summertime potatoes: More Russets offset lower yellow and red shipments in 2026



Note: Domestic weekly shipment totals for weeks 19–29. Excludes potato seed and chipping potatoes.

Source: USDA, Economic Research Service based on data from the USDA, Agricultural Marketing Service, *Market News*.

Almost all Russet shipments this summer were storage potatoes harvested last year (98 percent). By contrast, about 65 percent of yellow shipments during the summer (May–mid-July) were harvested in 2026 (primarily from Florida and California). Lower new crop summer shipments of yellow, red, and other specialty potatoes this year suggest winter/spring harvested acreage, which accounts for a smaller portion of total U.S. acreage, was lower this year.

Chipping potatoes: In contrast to fresh potato shipments this year, chipping potato shipments (fresh potatoes for chip processing) have trended lower according to movement data from

USDA, AMS *Market News*. Chipping potato shipment volumes from January through mid-July 2026 lagged 1 percent behind last year and 15 percent behind 2024 for the same period. By mid-July 2026, chipping potato shipments had largely transitioned from the 2025 storage crop to the 2026 crop. In June 2026, both the Producer Price Index (PPI) for potato chips and sticks (plain and flavored) and the U.S. average retail price for potato chips were lower than the same month a year ago (down 6 and 3 percent, respectively), according to data from BLS.

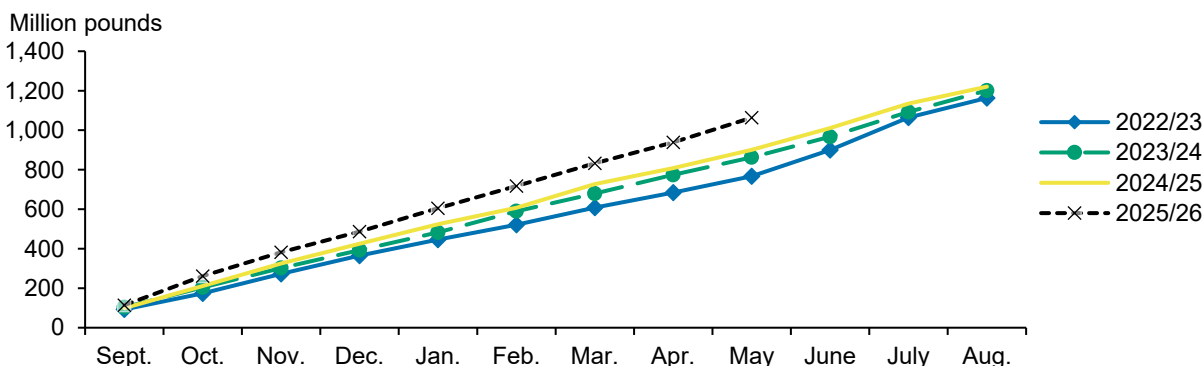
Potato Exports and Imports in MY 2025/26

Three-quarters into marketing year 2025/26 (September–May), U.S. exports of all potatoes and potato products (including starch) totaled \$1.63 billion, a decrease of 5 percent from the previous year. Although exports of fresh potatoes and potato chips increased, they did not offset a decline in french fry exports, which remain the largest U.S. potato export category by both value and volume. Imports of all potatoes and potato products totaled \$2.24 billion, down 8 percent from a year earlier. This year-over-year decline in import value was mainly attributable to reductions in frozen french fries (down 11 percent), potato flakes (down 49 percent), and starch (down 17 percent). As a result, the U.S. trade deficit for potatoes and potato products narrowed to \$612 million, a 16-percent decrease compared to 2024/25.

Fresh exports are on pace to set record high in 2025/26: Season-to-date U.S. fresh potato exports (excluding seed) totaled 1,063 million pounds, up 18 percent from last season and the largest volume on record for the September–May period. Monthly exports are on pace in 2025/26 to surpass the previous record high of 1,221 million pounds set in marketing year 2024/25, marking the fifth consecutive season of export growth (figure 7). Two-thirds of export volume in 2025/26 went to top destinations Mexico (41 percent) and Canada (25 percent). Exports to Mexico rose 13 percent from the same period last season to a record-high 438.6

Figure 7

Cumulative monthly fresh potato exports in 2025/26 on pace to set new record high



Note: Excludes fresh seed potatoes. Potato marketing year starts in September and ends in August of the following year.

Source: USDA, Economic Research Service based on data from U.S. Department of Commerce, Bureau of the Census.

million pounds. Exports to Canada increased 73 percent year over year to 265.2 million pounds,

the largest volume for the September–May period in 5 years. More than halfway through the 2025/26 marketing year (September–May), lower export volumes to Japan (down 11 percent) were offset by higher volumes to South Korea (up 43 percent), relative to 2024/25.

U.S. frozen french fry exports and imports are lower this season: The United States is a leading global exporter and importer of frozen french fries. So far in marketing year 2025/26 (September–May), U.S. frozen french fry exports totaled 1.16 billion pounds, down 9 percent from last year and 17 percent below the previous 5-year average. This export volume represents the lowest level for this period since 2010/11. Thus far in 2025/26, the contraction in exports was primarily due to lower volumes to Mexico (down 24 percent), South Korea (down 13 percent), and the Philippines (down 19 percent). U.S. exports to Japan, the leading destination, were 1 percent lower than in 2024/25 but 5 percent higher than 2 years ago. According to data from Trade Data Monitor, LLC, South Korea and the Philippines report higher shipments from other countries, including China, India, and Australia offsetting lower U.S. export volumes. Lower marketing year to date U.S. exports to Mexico were partially offset by shipments from Canada.

From September 2025 to May 2026, U.S. frozen french fry imports totaled 1.88 billion pounds, down 5 percent from last year and the lowest volume since 2021/22. Nearly all imports continued to come from Canada (1.63 billion pounds) and the European Union (206 million pounds), with import unit values falling year over year from both sources. Compared to the prior year, 2025/26 import volume from Canada declined 3 percent, while those from the European Union declined by 11 percent. The United States remained the principal export market for Canada's frozen potato products in 2025/26, accounting for 83 percent of Canada's season-to-date export volume—a decrease of 3 percentage points from the previous year. Notably, during 2025/26, Canada's exports of frozen potato products to Japan and Mexico increased, both of which are historically the top markets for U.S. french fry exports.

Potato chip exports and imports: The United States exported 81 million pounds of potato chips valued at \$185 million to date in MY 2025/26 (September–May), 10 percent higher by volume and 13 percent higher by value compared to MY 2024/25. Imports totaled 98 million pounds, valued at \$262 million, up 8 percent in volume and 7 percent in value from last season. Over the past decade, U.S. potato chip imports, primarily from Canada, have steadily increased. In 2024, the United States became a net importer of potato chips for the first time, a trend that continued through 2025 and early 2026. Despite rising imports, ERS estimates that domestic production continued to account for most of U.S. potato chip availability in 2025 (91 percent).

Sizing Up This Year's Spuds

Starting in 2026, weekly crop progress and condition data are no longer published by USDA, NASS for the following States: Idaho, Washington, Oregon, Wisconsin, and Minnesota. In 2026, the only surveyed States included in weekly crop progress and condition reports are Colorado, North Dakota, and Maine. The following is a summary of State-level potato crop updates based on available USDA, industry, and university agricultural extension sources:

- In the Pacific Northwest (**Washington, Idaho, and Oregon**), warm spring weather enabled an early start and finish to planting. Conditions have been generally favorable, aside from brief frost events in parts of Idaho. If favorable weather persists, the early planting could support average or above-average yields. Harvest began in late July and will continue through October.
- For the week ending July 26, 2026, potato crop conditions in **Colorado's** San Luis Valley were rated 80 percent good to excellent, below last season (85 percent) but above the 5-year average (71 percent). Planting and emergence lagged about a week behind the 5-year average this year. Drought conditions and limited irrigation water availability have been ongoing concerns for growers this season.
- In **North Dakota**, 54 percent of acres were rated in good-to-excellent condition, below last season (73 percent) but 1-percent above the 5-year average. By July 26, the percentage of fields in bloom (93 percent) was on par with the 5-year average (90 percent).
- In **Maine**, planting concluded in mid-June, and fields had fully emerged by mid-July. USDA, NASS estimates show both planted acreage and June 1 storage inventories unchanged from last year.
- **Michigan, Minnesota, and Wisconsin** growers faced variable weather conditions this season, including cool planting temperatures, periods of rain, and episodes of high heat. Despite these challenges, university extension reports indicate that potato crops in all three States are generally in good condition.
- Potato production in **California** spans from the Klamath Basin in the north to the Imperial Valley in the south. Kern County, located in central California, accounts for about 40 percent of the State's potato acreage. In 2026, Kern County reported spring-planted acres were down 5 percent from last year. Chipping potatoes make up the majority of this area at 55 percent, while the remaining acreage is planted to Yukon Gold (19 percent), red (16 percent), and white (10 percent) varieties.

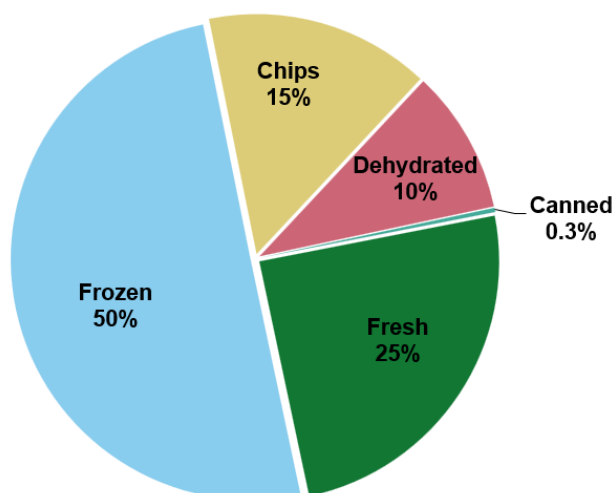
- **Florida's** 2026 planted potato acreage remains unchanged year to year at 17,000 acres. Freezing temperatures in early February damaged the winter season potato crop, resulting in lower fresh-market potato shipments from Florida this spring. Florida's chipping crop was largely unaffected by the freeze because most fields had not yet been planted or had not emerged. USDA, AMS shipment data show year-to-date chipping potato volumes are about 30 percent higher than a year ago.

2025 Preliminary Potato Per Capita Availability

The ERS preliminary per capita availability of potatoes for calendar year 2025 is 112 pounds, a 2-percent decrease from 2024. In 2025, frozen potato per capita availability was about 56 pounds per person on a fresh-weight basis, representing half of all potato availability (figure 8). The remaining potato categories are estimated to maintain similar shares of availability in 2025 relative to 2024. This includes fresh potatoes (25 percent), potato chips (15 percent), dehydrated potatoes (10 percent), and canned potatoes (0.3 percent). ERS will update its 2025 per capita availability estimate following the USDA, NASS *Potatoes 2025 Summary* released in September 2026, which will include final estimates for the 2025 crop, including farm disposition and utilization of sales.

Figure 8

Share of potato per capita availability by category in 2025P



P = Preliminary.

Note: Per capita availability category shares are based on a fresh-weight equivalent volume. The dehydrated category excludes potato starch.

Source: USDA, Economic Research Service using data from U.S. Department of Commerce, Bureau of the Census and USDA, National Agricultural Statistics Service.

Dry Edible Beans Excluding Chickpeas

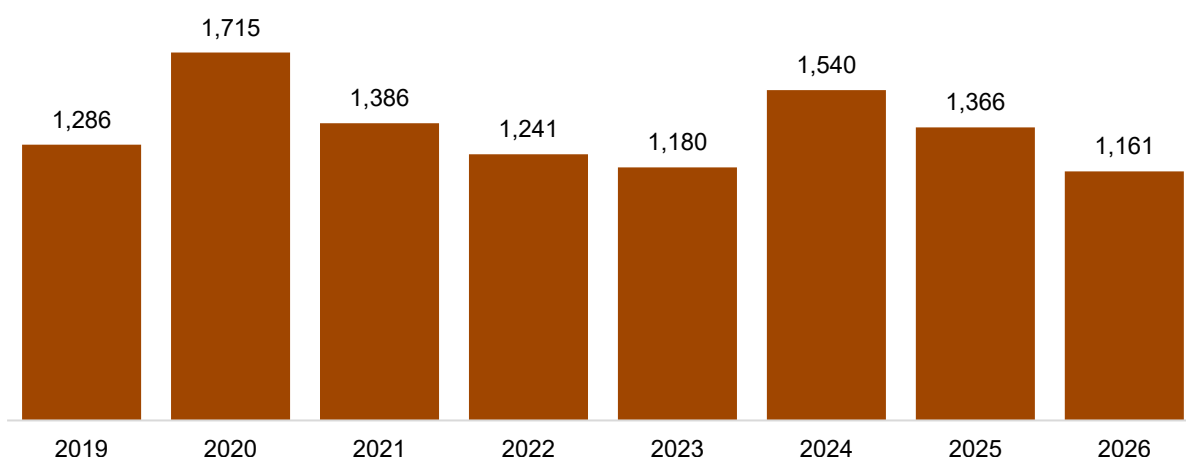
Dry Bean Acreage and Supply Prospects

The June 2026 NASS *Acreage* report provides updated 2026 dry bean planted acreage estimates following the March 2026 *Prospective Plantings* report, along with expected harvested area for the current crop. U.S. dry edible bean planted area, excluding chickpeas, is estimated at 1.16 million acres in 2026, down 205,000 acres, or 15 percent, from 2025, returning closer to 2023 levels before the larger 2024 acreage expansion. From 2019 to 2025, harvested area accounted for more than 95 percent of planted acreage each year, so changes in planted area have generally carried through to harvested acreage. Expected harvested area is estimated at 1.13 million acres, also down about 15 percent from last year. Because 2026 yield and production estimates are not yet available, planted acreage provides the clearest early indication of potential production direction for the new crop.

Figure 9

U.S. dry edible beans: Planted acreage declines in 2026

Thousand acres



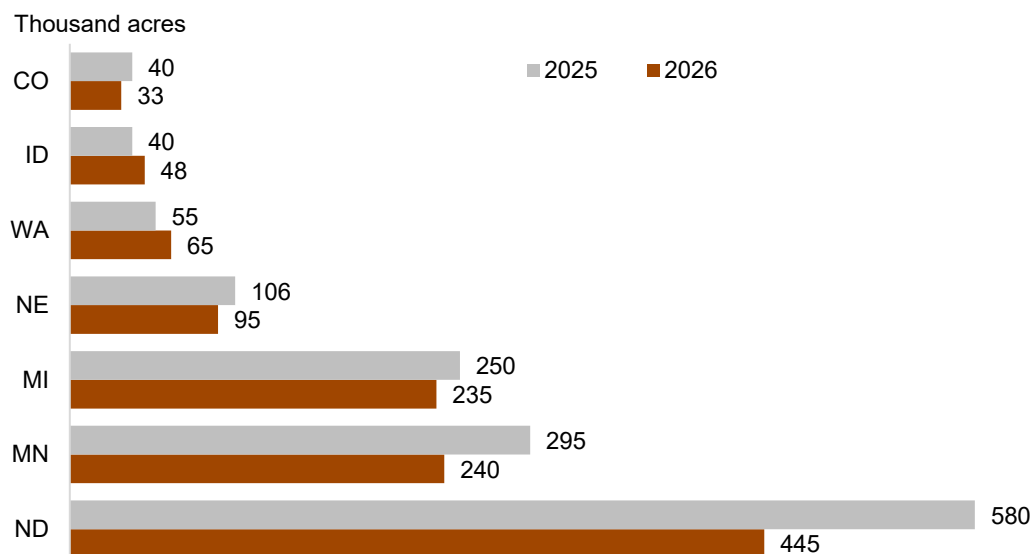
Source: USDA, Economic Research Service using data from USDA, National Agricultural Statistics Service, *Acreage*.

North Dakota remains the largest dry bean acreage State and accounts for most of the national drop in dry bean acreage in 2026 (figure 10). Planted area in North Dakota is estimated at 445,000 acres, down 135,000 acres from 2025 and 33 percent below its 2020–24 average, marking the lowest level since 2019. Minnesota and Michigan remain the next largest dry bean acreage States, but their 2026 estimates are closer to recent averages. Minnesota planted area is down 19 percent from 2025 but only 1 percent below its 2020–24 average, while Michigan is down 6 percent from 2025 but 3 percent above its 2020–24 average. In contrast, Washington

and Idaho are expected to increase planted acreage from 2025, with Washington reaching its highest level since 2019.

Figure 10

U.S. dry edible beans by State: North Dakota remains the largest dry bean acreage State despite lower plantings in 2026



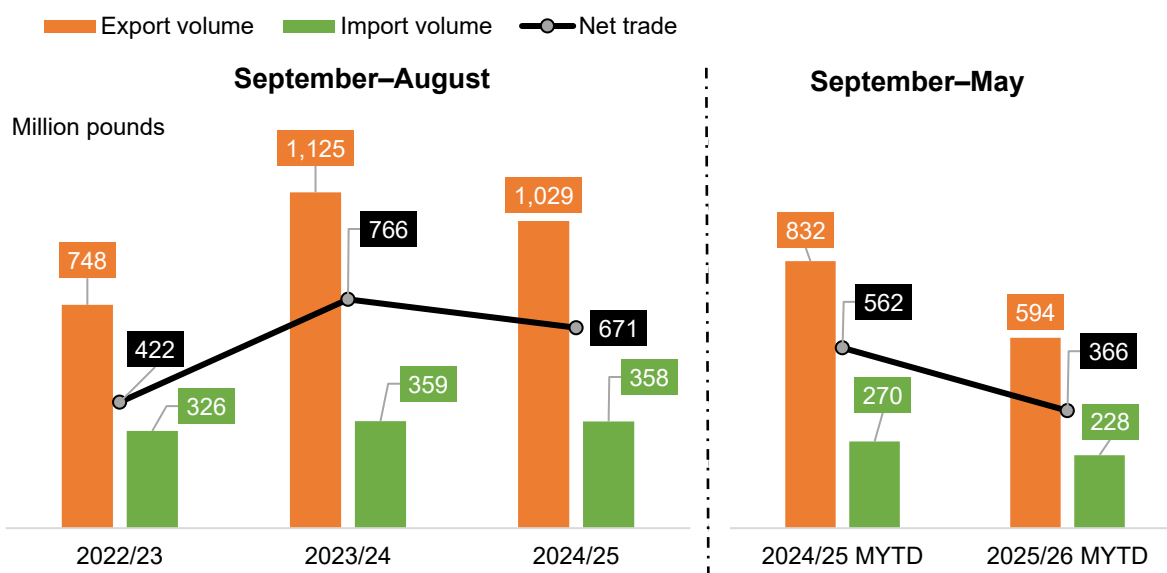
Source: USDA, Economic Research Service using data from USDA, National Agricultural Statistics Service, *Acreage*.

December 2025 stock estimates available from the Upper Great Plains Transportation Institute (UGPTI) at North Dakota State University provide additional context for the 2025/26 marketing year. Stocks for pinto, black, navy, and small red beans totaled 863 million pounds, down 12 percent from the previous year. Pinto stocks were down 9 percent, and black bean stocks were down 36 percent, while navy and small red stocks were slightly higher. These mixed but lower aggregate stock levels may limit some of the inventory cushion entering the 2026 acreage decline, though final 2026 production will depend on realized harvested area and yield.

Dry Bean Net Trade Narrows as Exports To Mexico Decline

U.S. dry bean trade has slowed in the 2025/26 marketing year to date, with both exports and imports below year-earlier levels. From September 2025 through May 2026, exports totaled 594 million pounds, down 29 percent from the same months last year, while imports totaled 228 million pounds, down 16 percent (figure 11). Because exports fell more sharply than imports, the U.S. dry bean net export position (exports minus imports) narrowed from 562 million pounds to 366 million pounds. U.S. export and import volumes through May of 2026 are shown in table B1 and table B2.

Figure 11

U.S. dry bean exports fall faster than imports in 2025/26 marketing year to date

Note: MYTD = marketing year to date; September–May values shown. Dry edible beans exclude chickpeas.

Source: USDA, Economic Research Service using data from the U.S. Department of Commerce, Bureau of the Census.

Dry bean export volume declined from 2024/25 to 2025/26 marketing year to date, with the decrease concentrated in shipments to Mexico. Mexico remained the largest U.S. dry bean export market through May 2026, accounting for a 25-percent share of marketing-year-to-date export volume, down from a 34-percent share during the same period last year. Exports to Mexico fell 48 percent from the previous marketing year to date. This drop accounted for 57 percent of the total year-over-year decline in U.S. dry bean exports. Mexico's bean market provides additional context for the decline, though its April–March marketing year differs from the September–August U.S. dry bean marketing year. According to USDA, Foreign Agricultural Service's April 2025 Global Agricultural Information Network report, *Mexico: Beans*, Mexico's 2024/25 bean production was forecast 41 percent above the previous year's record-low crop, while per capita bean consumption declined from 9 kilograms in 2021 to 7.7 kilograms in 2024. These data provide background for weaker U.S. shipments to Mexico, but the U.S. marketing year-to-date comparison should be interpreted cautiously because it does not directly align with Mexico's production and marketing year calendar.

Dry bean import volume also declined from September 2025 through May 2026, but the import-side changes were more mixed. Lower shipments from Nicaragua, India, and Mexico accounted for much of the decline, while imports from Brazil and Costa Rica increased, albeit from smaller bases. By class, import declines were concentrated in miscellaneous dry beans, mung beans, navy beans, blackeye cowpeas, and lima beans, while pinto bean imports

increased modestly. Overall, the import-side changes appear to reflect supplier and class-level variation rather than a single broad import-side driver.

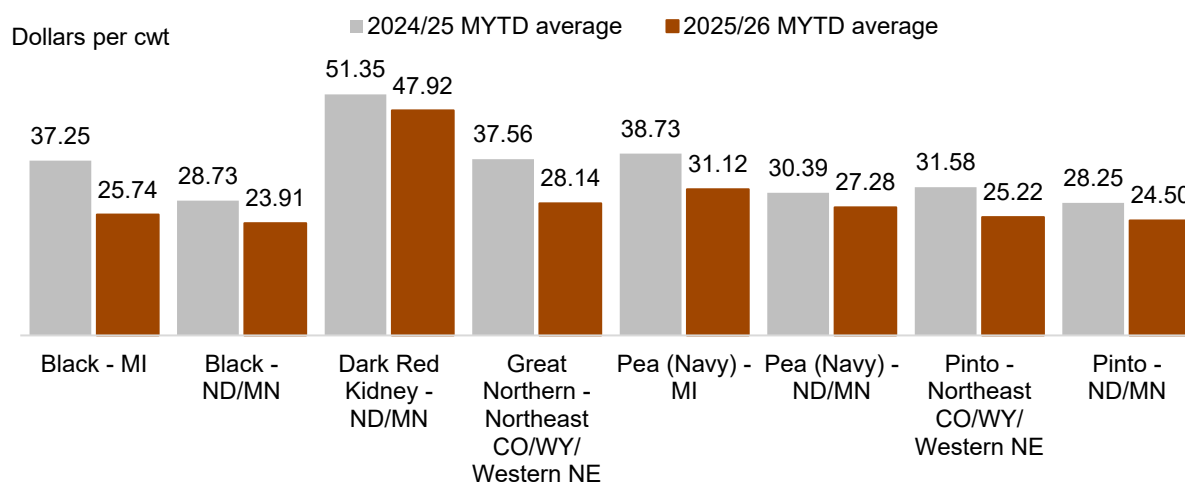
Dry Bean Prices Remain Lower Across Major Classes

National dry bean prices declined for the second consecutive marketing year in 2025 after remaining above \$40 per cwt from 2021–23. The preliminary U.S. all-dry bean price received by growers averaged \$30.20 per cwt in the 2025 marketing year, down from \$36.90 in 2024 and \$41.80 in 2023. More recent USDA, AMS grower price data indicate that low prices have persisted into the 2025/26 marketing year to date.

USDA, AMS grower price data from September 2025 through July 2026 show lower prices across selected major reported dry bean classes in the 2025/26 marketing year to date (September–July) (figure 12). Prices for black beans were lower than prior-year levels in both Michigan and the North Dakota/Minnesota region, while pinto bean prices in North Dakota/Minnesota also remained below prior-year levels. Black and pinto beans are especially relevant to the broader dry bean outlook because they accounted for a combined share of about two-thirds of U.S. dry bean planted acreage, excluding chickpeas, from 2021–25 and are important for U.S. export markets, including Mexico.

Figure 12

U.S. dry bean prices for major dry bean classes remain below prior-year levels in 2025/26 MYTD



Cwt = hundredweight, a unit of measure equal to 100 pounds. MYTD = marketing year to date; September–July only. The 2025/26 MYTD average includes reported prices from September 2025 through the USDA, AMS report dated July 29, 2026; 2024/25 reflects the comparable September–July period. Prices are simple averages of reported USDA, AMS delivered warehouse grower prices. Source: USDA, Economic Research Service calculations using data from USDA, Agricultural Marketing Service, *Weekly Bean, Pea, and Lentil Market Review*.

Lower prices were not limited to black and pinto beans. Reported navy bean prices were also lower in Michigan and North Dakota/Minnesota, and Great Northern bean prices in the Northeast Colorado/Wyoming/Western Nebraska region declined from previous year levels. The

class-level AMS data indicate that prices were systematically lower in 2025/26, and that decreases in prices were not driven by a single class or producing region. Lower prices in 2025/26 may help explain reductions in 2026 planted acreage.

Dry Bean Availability Declines as Pinto and Black Supplies Ease

Per capita availability is a supply-side measure and does not represent actual food intake or consumption. It reflects the amount of food available for domestic use after accounting for production, trade, stocks, and population. U.S. dry bean per capita availability, based on preliminary data, declined in 2025 (after increasing sharply in 2024) but remained above 2021–23 levels. Dry bean availability totaled 6.3 pounds per person in 2025, down from 6.6 pounds in 2024. Pinto and black beans continued to account for most dry bean availability, but both declined from their 2024 levels. Gains in smaller classes, including navy, kidney, and small red beans, partially offset lower pinto and black bean availability.

Pinto bean availability declined 15 percent in 2025 to 2.7 pounds per person, down from 3.2 pounds in 2024. The decline was driven primarily by lower production, which fell 28 percent from the previous year. Lower exports and reduced ending stocks partially offset the production decline, but not enough to prevent a reduction in domestic availability. Pinto beans remained the largest dry bean class by per capita availability.

Black bean availability also declined in 2025, falling 12 percent to 1.7 pounds per person. Black bean production declined 23 percent from 2024, while imports were down 17 percent. Exports were nearly unchanged from the previous year, limiting the amount of supply available for domestic use. Despite the decline, black beans remained the second-largest dry bean class by per capita availability.

Availability increased for several smaller dry bean classes in 2025. Navy bean availability rose 23 percent to 0.5 pounds per person, supported by a 19-percent increase in production and lower exports. Kidney bean availability increased to 0.4 pounds per person, reflecting higher production and lower exports, even as imports declined and ending stocks increased. Small red bean availability also increased, supported by higher beginning stocks and production.

In 2025, the class-level availability data showed that dry bean availability remained concentrated in pinto and black beans, while smaller classes contributed more to the dry bean mix than in the previous year.

Chickpeas

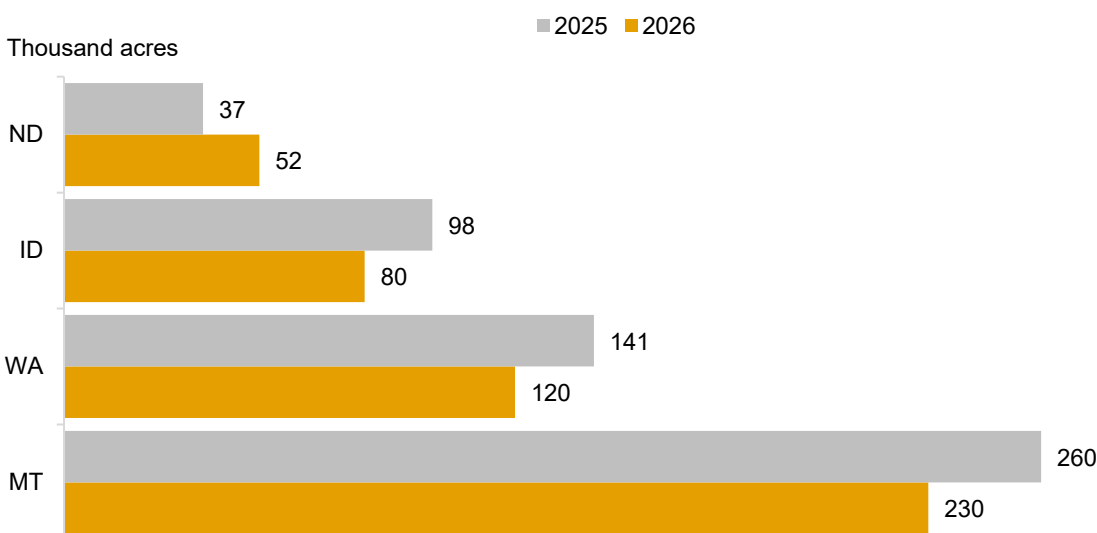
Chickpea Planted Area, Production, and Stocks

The 2025/26 chickpea marketing year, like dry beans, began in September 2025 and ends in August 2026. The June NASS *Acreage* report confirms lower chickpea planted acreage in 2026. U.S. chickpea planted area is estimated at 482,000 acres in 2026, down 54,000 acres, or 10 percent, from 2025. Since 2020, chickpea harvested area has generally tracked planted acreage, accounting for at least 95 percent of planted area each year. Expected harvested area is estimated at 468,200 acres, also down 10 percent from last year. By class, large chickpea planted area in 2026 is estimated at 370,000 acres, down 9 percent from 2025, while small chickpea planted area is estimated at 112,000 acres, down 13 percent.

The 2026 acreage decline follows a bigger 2025 chickpea crop and lower 2025/26 grower prices. Although available sources do not identify a single cause for the reduction, USDA, NASS acreage estimates, regional farm press coverage, and pulse-market outlook reporting suggest that lower chickpea prices weakened planting incentives relative to other crop choices within small-grain-based rotations, likely contributing to lower chickpea plantings in Montana, Washington, and Idaho (figure 13).

Figure 13

U.S. chickpeas: Lower chickpea plantings in Montana, Washington, and Idaho drive the 2026 national acreage decline



Source: USDA, Economic Research Service using data from USDA, National Agricultural Statistics Service, *Acreage*.

Montana remains the State with the most chickpea acreage but accounts for the largest acreage decline. Combined large and small chickpea planted area in Montana is estimated at 230,000 acres, down 30,000 acres from 2025. Washington planted area is estimated at 120,000 acres, down 21,000 acres, with most of the decline coming from small chickpeas. Idaho planted area is estimated at 80,000 acres, down 18,000 acres from last year. In contrast, North Dakota chickpea planted area is estimated at 52,000 acres, up 15,000 acres from 2025, partially offsetting declines in the other major producing States. Final 2026 chickpea production will depend on realized harvested area and yield, but the June acreage estimates point to lower production potential than last year.

Chickpea Net Trade Holds Steady as Pakistani Export and Canadian Import Shares Increase

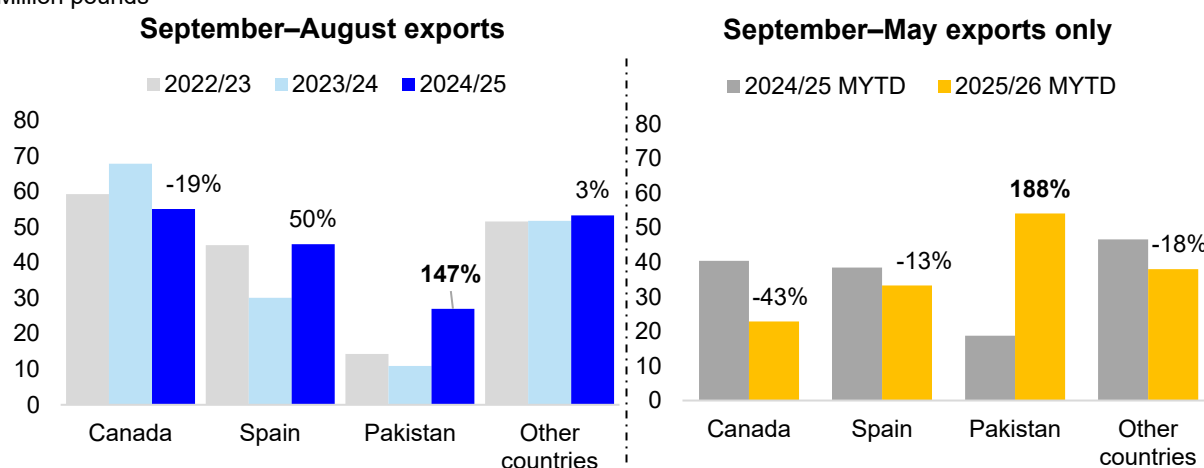
U.S. chickpea net trade was nearly unchanged in the 2025/26 marketing year to date as exports and imports both increased modestly. From September 2025–May 2026, chickpea exports totaled 148 million pounds, up 3 percent from the same period last year (table B3), while imports totaled 66 million pounds, up 6 percent (table B4). Because exports and imports increased by similar volumes, the U.S. chickpea net trade position remained near 82 million pounds.

The stable net trade position masked a significant shift in export partner rankings. Pakistan, which ranked as the third-largest U.S. chickpea destination in each of the previous 3 full marketing years, moved into first place in the 2025/26 marketing year to date (figure 14).

Figure 14

U.S. chickpeas: Pakistan accounts for larger shares of chickpea exports in 2024/25 and 2025/26 marketing year to date

Million pounds



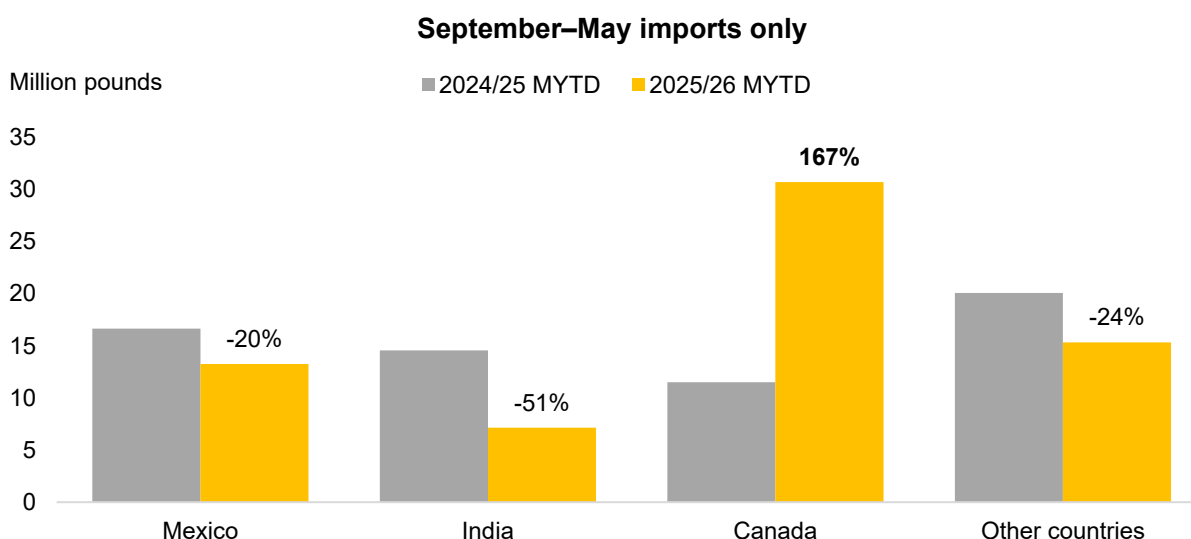
Note: MYTD = marketing year to date; September–May values shown. The latest MYTD period shown is September 2025 through May 2026. Percentages above 2024/25 marketing year and 2025/26 MYTD series are the year-over-year percentage changes. Source: USDA, Economic Research Service using data from the U.S. Department of Commerce, Bureau of the Census.

Shipments to Pakistan reached 54 million pounds from September 2025–May 2026, nearly triple the previous year-to-date volume and exceeding shipments to both Spain and Canada. The increase appears consistent with a broader rise in Pakistan's chickpea import demand rather than a U.S.-specific market shift alone. USDA, Foreign Agricultural Service reporting identifies Pakistan as a major chickpea import market where domestic pulse supply gaps support import demand and several major suppliers compete for market share. Trade data indicate Australia remained a major supplier to Pakistan, suggesting higher U.S. shipments occurred within a broader Pakistan import expansion rather than because of a clear supply disruption among competing exporters. Larger exports to Pakistan more than offset lower shipments to Canada and Spain, which declined 43 percent and 13 percent, respectively (table B3). With several months remaining in the marketing year, it is too early to determine whether Pakistan will remain the leading U.S. chickpea export destination for the full 2025/26 marketing year.

On the import side, Canada accounted for a larger share of U.S. chickpea imports. U.S. chickpea imports from Canada increased to 31 million pounds through May, compared with 12 million pounds during the same period last year (table B4 and figure 15). The increase coincided with larger Canadian chickpea supplies, which boosted exportable availability and reduced Canada's need for U.S. chickpeas. Imports from Mexico, India, and Turkey declined, partly offsetting the increase from Canada.

Figure 15

Canada accounts for larger shares of U.S. chickpea imports in 2025/26 marketing year to date



Note: MYTD = marketing year to date; September–May values shown. The latest period shown is September 2025 through May 2026. Percentages above 2025/26 MYTD series are the year-over-year percentage changes.
Source: USDA, Economic Research Service using data from the U.S. Department of Commerce, Bureau of the Census.

Chickpea Prices Continue Lower Despite Reduced 2026 Acreage

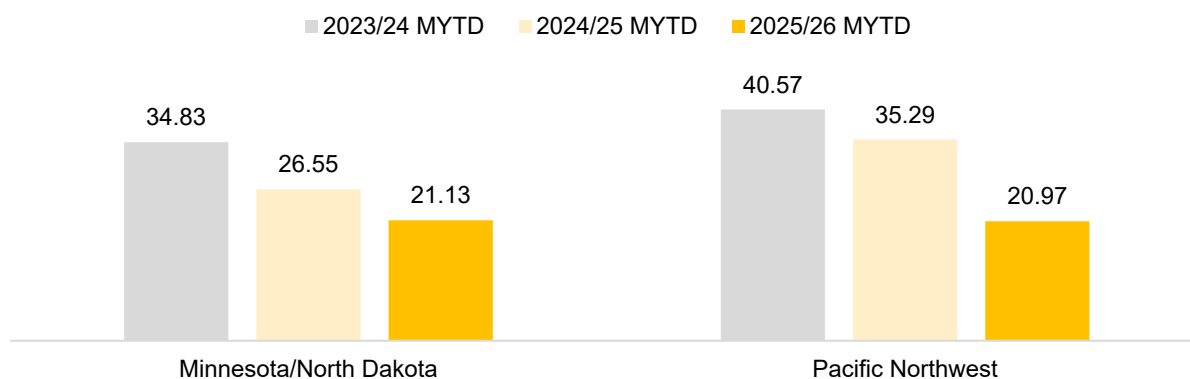
Chickpea prices declined in 2025, extending the adjustment from recent highs (figure 2). The U.S. all-chickpea price received by growers averaged \$28.50 per cwt in 2025, down from \$31.50 in 2024. Prices declined for both major chickpea classes, with large chickpeas averaging \$30.30 per cwt, down 12 percent from 2024, and small chickpeas averaging \$18.70 per cwt, down 27 percent.

More recent USDA, NASS monthly price data indicate that lower prices continued into the 2025/26 marketing year. From September 2025 through May 2026, the all-chickpea monthly price averaged about \$22.30 per cwt, down 27 percent from the same months a year earlier. Monthly prices were below prior-year levels in every reported month from September through May, with the largest year-over-year declines occurring from March through May.

USDA, AMS regional price data for conventional garbanzo beans, which corresponds to large conventional chickpeas in the NASS chickpea class data, show a similar pattern, though the decline varies by region. From September 2025 through July 2026, delivered warehouse grower prices averaged \$21.13 per cwt in the Minnesota/North Dakota region, down 20 percent from the same months in 2024/25 (figure 16). In the Pacific Northwest, prices averaged \$20.97 per cwt, down 41 percent from the previous marketing year to date. Prices declined in both regions across the 3-year period shown, with the sharper 2025/26 decline occurring in the Pacific Northwest.

Figure 16

Conventional large chickpea grower prices remain lower in 2025/26 MYTD, with a sharper decline in the Pacific Northwest
Dollars per cwt



Note: Cwt = hundredweight, a unit of measure equal to 100 pounds. MYTD = marketing year to date; September–July only. Prices are simple averages of reported USDA AMS delivered warehouse grower prices for conventional garbanzo beans from September–July, including four weekly July observations in each marketing year for comparability. The latest period shown is September 2025 through July 2026, which includes reports through July 24, 2026. USDA, AMS regional prices refer to U.S. No. 1 garbanzo beans, which correspond to large chickpeas in USDA, NASS chickpea class data. Source: USDA, Economic Research Service using data from USDA, Agricultural Marketing Service, *Weekly Bean, Pea, and Lentil Market Review*.

Lower chickpea prices are consistent with a market still adjusting to larger carry-in supplies from the previous crop year. Chickpea production increased in 2025, and June 1, 2026 stocks were 40 percent higher than a year earlier, indicating continued inventory availability during the 2025/26 marketing year. Although 2026 planted and expected harvested acreage are lower than in 2025, the current price environment still reflects the effects of larger recent production and inventory availability entering the 2025/26 marketing year.

Chickpea Availability Rises as Production Expands

Per capita availability is a supply-side measure and does not represent actual food intake or consumption. It reflects the amount available for domestic use after accounting for production, trade, stocks, and population. U.S. chickpea per capita availability, based on preliminary data, increased 9 percent in 2025 to 1.4 pounds per person, up from 1.3 pounds in 2024 (figure 17).

Higher domestic production was the main factor supporting increased chickpea availability. U.S. chickpea production rose 20 percent in 2025, while beginning stocks also increased from the previous year. Together, higher production and larger carry-in stocks raised total chickpea supply and supported increased domestic availability.

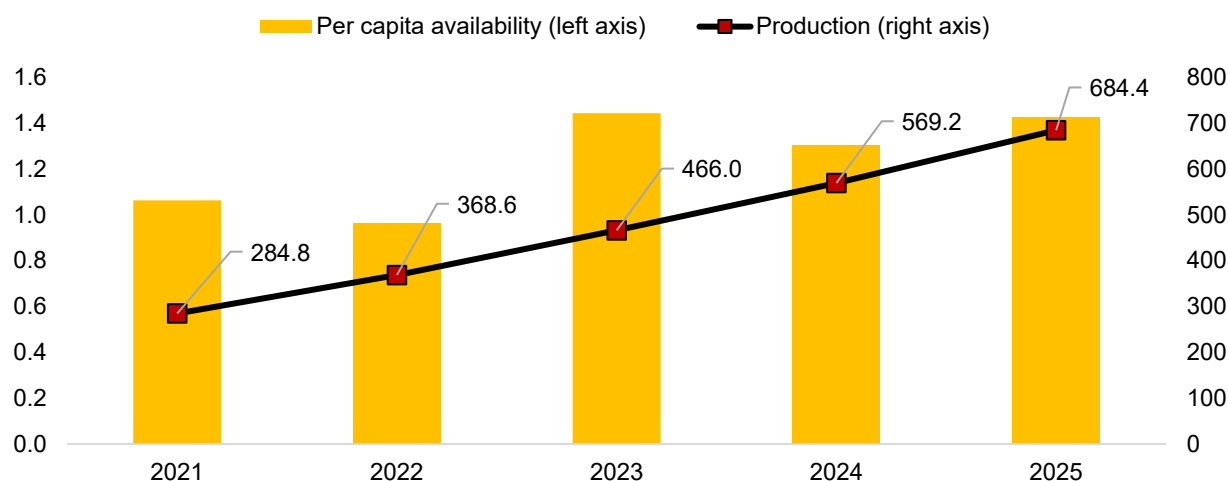
The increase in domestic availability was moderated by stronger exports, lower imports, and higher ending stocks. Chickpea exports increased 30 percent in 2025, while imports declined 23 percent and ending stocks rose 17 percent. Despite these offsets, domestic availability increased 10 percent, lifting per capita availability above the previous year.

Figure 17

Higher chickpea production supports increased per capita availability in 2025

Pounds per person

Million pounds



Source: USDA, Economic Research Service using data from USDA, National Agricultural Statistics Service, QuickStats and USDA, Economic Research Service calculations.

Dry Edible Peas and Lentils

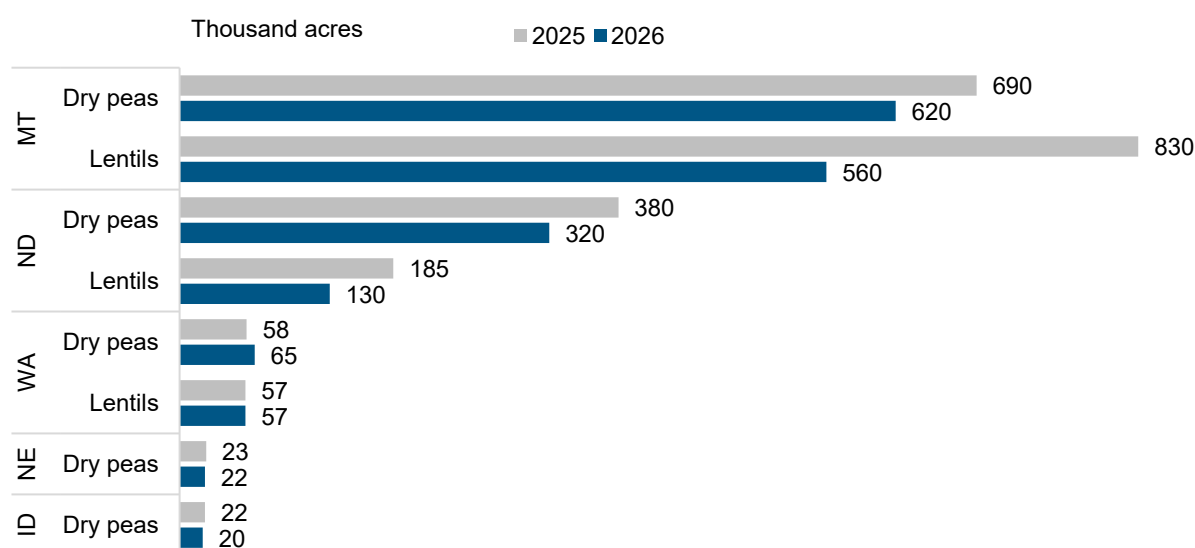
Dry Pea and Lentil Acreage Declines After 2025 Production Gains

The 2025/26 dry pea and lentil marketing year began in July 2025 and ended in June 2026. The USDA, NASS *Acreage* report released in June 2026, reported less acreage for dry peas and lentils in 2026, following production gains and lower prices in 2025. Dry pea planted area is estimated at 1.05 million acres in 2026, down 126,000 acres, or 11 percent, from 2025. Expected harvested area is estimated at 1.00 million acres, down 62,000 acres, or 6 percent. Lentil planted area is estimated at 747,000 acres, down 325,000 acres, or 30 percent, from 2025, while expected harvested area is estimated at 701,000 acres, down 248,000 acres, or 26 percent (figure 18). Together, these acreage estimates indicate lower 2026 production potential for both dry pea and lentils, driven primarily by reduced plantings.

Lentil acreage decline is concentrated in Montana and North Dakota. Montana lentil planted area is estimated to be 560,000 acres in 2026, down 270,000 acres, or 33 percent, from 2025. North Dakota lentil planted area is estimated to be 130,000 acres, down 55,000 acres, or 30 percent. Washington lentil planted area is unchanged from last year at 57,000 acres, and projected harvested area for 2026 is slightly higher than the previous year.

Figure 18

U.S. dry pea and lentil: Planted area declines remain concentrated in Montana and North Dakota



Source: USDA, Economic Research Service using data from USDA, National Agricultural Statistics Service, *Acreage*.

Dry pea acreage also declined in 2026, but the reduction is smaller than the lentil contraction. Montana remains the leading dry pea acreage State in 2026, with planted area estimated at

620,000 acres, down 70,000 acres, or 10 percent, from 2025. North Dakota planted area is estimated to be 320,000 acres, down 60,000 acres, or 16 percent. Washington dry pea planted area increased 12 percent to 65,000 acres, offsetting smaller declines in Idaho and Nebraska.

Stocks were higher near the end of the 2025/26 marketing year. June 1, 2026 stocks were up 94 percent for lentils to 308 million pounds and 19 percent for dry peas to 392 million pounds from a year earlier. This followed higher June 1, 2025, stocks, which were up 88 percent for lentils and 28 percent for dry peas from June 1, 2024. These back-to-back increases point to larger carryout for both crops, while the June acreage estimates point to lower production potential for the 2026 crop.

Dry Pea and Lentil Net Trade Narrows as Exports Decline

The United States is a net dry pea and lentil exporter with marketing year export volume exceeding import volume for over 30 years (1990/91–2024/25).

U.S. dry pea and lentil net trade narrowed sharply in the 2025/26 marketing year to date as exports declined and imports remained comparatively stable. From September 2025–May 2026, combined dry pea and lentil exports totaled 525 million pounds, down 58 percent from the same period last year (table B5), while imports declined 4 percent to 149 million pounds (table B6). As a result, net trade fell from 1.09 billion pounds in 2024/25 marketing year-to-date to 376 million pounds in 2025/26 marketing year to date.

In 2025/26, there were declines in both dry pea and lentil exports. Dry pea exports fell 53 percent to 280 million pounds, led by lower split and yellow pea shipments. Split pea exports declined 64 percent, while yellow pea exports declined 88 percent. Green pea exports were down 19 percent, a more moderate decline than other dry pea classes. By destination, dry pea exports to China were nearly unchanged, but shipments to Canada, Ethiopia, India, and several smaller markets declined sharply.

Lentil exports fell 62 percent to 245 million pounds during September 2025–May 2026 from the same period the previous year. The largest declines were in shipments to Canada and India, which together accounted for much of the year-over-year reduction. Lentil exports to Canada fell 71 percent, while shipments to India declined 88 percent. Lower shipments to Canada coincided with larger Canadian lentil supplies, while the decline to India is consistent with slightly higher domestic lentil production in India and India's March 2025 application of a combined 10-percent lentil import tariff that applied to the United States and other non-preferential suppliers. U.S.

exports to Spain were nearly unchanged, indicating that the lentil decline was concentrated in selected markets rather than uniform across all major destinations.

Larger dry pea and lentil supplies in Canada likely increased competition in export markets, including markets served by the United States. Agriculture and Agri-Food Canada April 2026 estimates Canada's 2025/26 dry pea production rose 31 percent from the previous year, while total supply increased 33 percent and carry-out stocks increased 167 percent. Lentil supplies in Canada also expanded, with production up 38 percent, total supply up 46 percent, and carry-out stocks up 180 percent. Stocks-to-use ratios also increased sharply, from 17 percent to 42 percent for dry peas and from 26 percent to 65 percent for lentils, indicating a substantially larger supply cushion in Canada.

Dry pea imports increased 4 percent, supported by higher shipments from Canada, while lentil imports declined 12 percent, mostly reflecting lower imports from Canada and India. Overall, the trade data point to an export-led narrowing of the U.S. dry pea and lentil net trade position in 2025/26 to date, amplified by larger Canadian supplies, selected destination declines, and a strong prior-year comparison base.

Dry Pea and Lentil Prices Continue Lower, Led by Steeper Lentil Declines

Dry pea and lentil prices declined in 2025, extending the adjustment from recent highs. The U.S. dry edible pea season-average price received by growers, as reported by USDA, NASS, averaged \$11.30 per cwt in 2025, down 17 percent from \$13.60 in 2024. Lentil prices fell more sharply, averaging \$24.90 per cwt in 2025, down 31 percent from \$35.90 in 2024. Dry pea prices had been highest in 2021–22, while lentil prices peaked more in 2023 before declining in 2024 and 2025.

More recent monthly USDA, NASS price data indicate that lower prices continued into the 2025/26 marketing year. From July 2025 through May 2026, dry pea prices averaged \$11.35 per cwt, down 17 percent from the same months a year earlier. Lentil prices averaged \$23.25 per cwt during the same period, down 37 percent from July 2024 through May 2025. Monthly lentil prices were below prior-year levels in every reported month, with the largest decline occurring after November 2025 (figure 19).

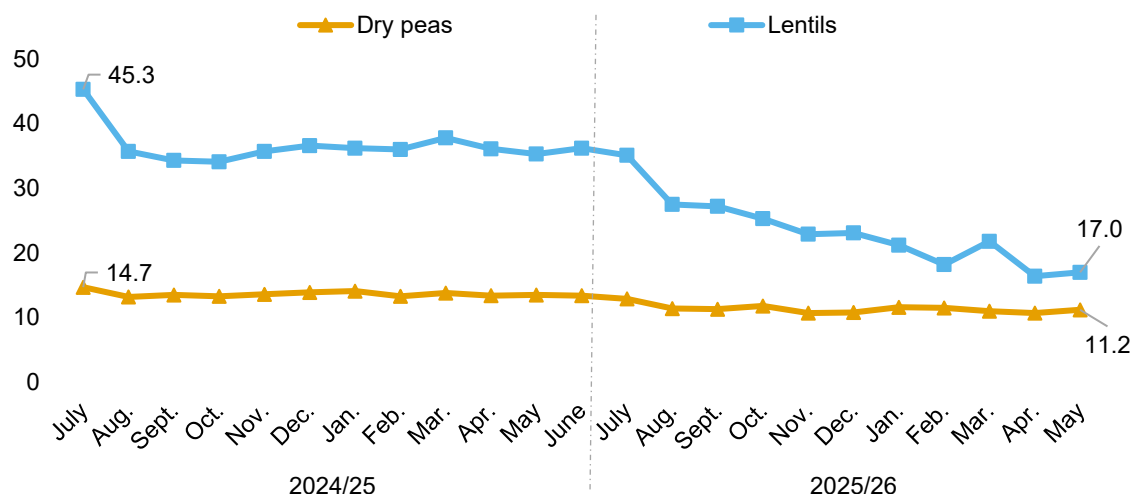
The sharper decline in lentil prices is consistent with a market still adjusting to the back-to-back large crops in 2024 and 2025, which were the third and second largest lentil crops on record, respectively, following a much smaller crop in 2023. Lentil acreage increased in 2025, and

production rose from the previous year. Dry pea production also increased in 2025, but the price decline has been more moderate than for lentils. In 2026, planted and expected harvested acreage are lower for both crops, especially lentils, but current price data still reflect the effects of larger recent production and available supplies during the July 2025–June 2026 marketing year.

Figure 19

Lentil prices decline more sharply than dry pea prices in 2025/26

Dollars per cwt



Note: The dry pea and lentil marketing year runs from July through June. Data are shown from July 2024 through May 2026. Source: USDA, Economic Research Service using data from USDA, National Agricultural Statistics Service, *QuickStats*.

Dry Pea and Lentil Availability Rise Sharply in 2025

Preliminary estimates indicate that per capita availability of dry peas and lentils increased sharply in 2025, supported by larger production and substantially lower calendar year exports. Availability increased sharply for both crops as domestic supply expanded and calendar-year exports declined substantially. **Lentil per capita availability** increased 108 percent in 2025 to 2 pounds per person, up from 1 pound in 2024. Domestic availability more than doubled, supported by higher production, larger beginning stocks, and a sharp decline in exports. Lentil production rose 17 percent from the previous year, while beginning stocks on June 1, 2025, reported shortly before the start of the July 2025–June 2026 marketing year increased 88 percent. The largest availability driver, however, was the 43-percent decline in calendar year exports, which left more supply available for domestic use. **Dry pea per capita availability** increased by 67 percent in 2025 to 3.9 pounds per person, up from 2.3 pounds in 2024. Dry pea production increased 9 percent, while calendar year exports declined 52 percent and imports declined 8 percent. The sharp reduction in exports was the principal trade-related factor increasing the quantity available for domestic use.

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