



# Wheat Outlook

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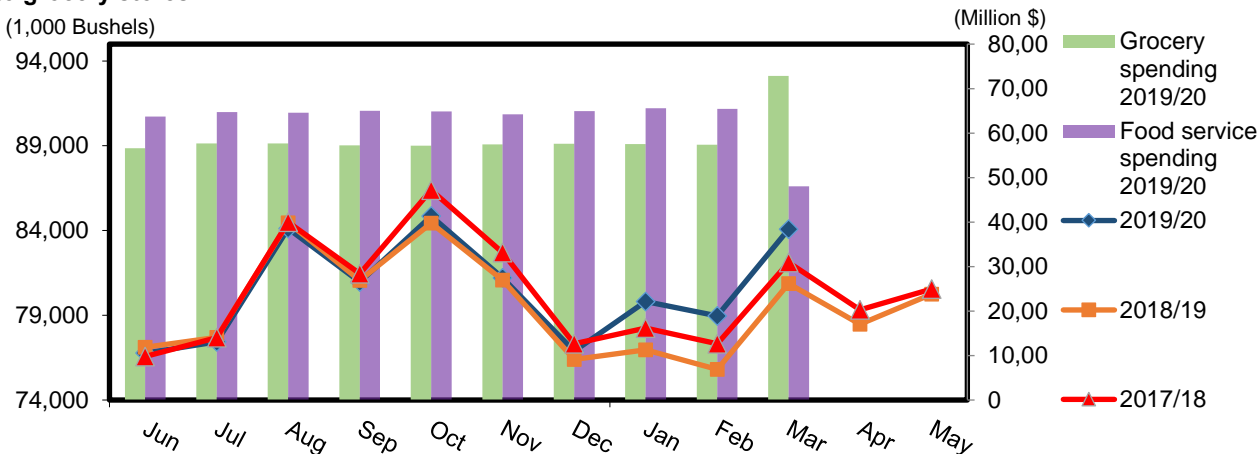
### In this report:

- [Domestic Outlook](#)
  - o [Feature: Food Use and COVID-19](#)
- [International Outlook](#)

## COVID-19 Linked Shifts in Consumption Lead to Surge in U.S. Wheat Food Use

Wheat flour production during the first 3 months of calendar year 2020 surged more than 4 percent and nearly 9 million bushels above the same period in 2019 (fig.1). Wheat flour purchases were affected by rising retail demand, specifically demand for family flour (used for home baking), pasta, pan breads, and wheat-based snack products. Rising retail demand corresponded with the emerging global COVID-19 pandemic, which led to widespread stay-at-home orders and encouraged consumers to stock up on staples. As some mills and bakeries reportedly operated on extended hours to meet the unseasonably high demand for flour and flour-based products at retail, sales to the food service sector—such as restaurants and institutions, including schools—was notably weaker.

Figure 1  
**U.S. monthly wheat flour production surges as COVID-19 leads consumers to shift spending from food service to grocery stores**



Sources: USDA, National Agricultural Statistics Service *Flour Milling Products* report data, USDA, Economic Research Service calculations, and U.S. Department of Commerce, Bureau of the Census.

# Domestic Outlook

## Domestic Changes at A Glance:

- U.S. wheat production for 2020/21 is projected at 1,866 million bushels, down 3 percent from 2019.
  - Based on survey-based data, USDA, National Agricultural Statistics Service (NASS) forecasts winter wheat production at 1,255 million bushels, down 4 percent from 2019 on lower yields and slightly lower harvested area.
- With smaller production and reduced ending stocks, year-to-year, supplies for 2020/21 are projected down 121 million bushels from the 2019/20 marketing year.
- Lower projected feed and residual use in the new marketing year, down 35 million bushels, combines with slightly higher seed and food use for a net 3 percent reduction in domestic utilization.
- Projected record-large corn supplies and the highest wheat-to-corn price ratio since 2014/15 are expected to displace wheat in livestock feed rations.
- Food use in 2020/21 is up 2 million bushels to 964 million as the gradual re-opening of the economy following COVID-19-related business closures and stay-at-home orders, is forecast to encourage greater consumption of food consumed away-from-home and to combined with still-strong retail sales of flour and flour-based products for a net increase in total use.
- Wheat prices for 2020/21 are projected at \$4.60 per bushel, unchanged from the 2019/20 season-average farm price forecast.
  - An outlook for low corn prices in 2020/21, projected at \$3.20 per bushel (versus \$3.60 in 2019/20) constrains upward momentum for the wheat price.
- For the 2019/20 balance sheet, exports are trimmed 15 million bushels this month to 970 million on a slower-than-expected pace and strong price competition from the European Union (EU) and Russia.
- A surge in retail buying, as consumers stocked up on staples including flour, bread, and pasta, resulted in a record-high wheat food use for the first three months of 2020.
  - On a marketing year basis, the trade-adjusted gains in wheat food use indicated in the NASS *Flour Milling Products* report help to lift wheat food use in this marketing year up 9.4 million bushels as compared with the same time in 2019.

**Table 1 - U.S. wheat supply and utilization at a glance 2019/20**

Balance sheet item	2019/20 April	2019/20 May	2019/20 Change from previous month	2020/21 May	Comments
<b>Supply, total</b>					<i>May-June Marketing Year (MY)</i>
Beginning stocks	1,079.8	1,079.8	0.0	977.9	
Production	1,920.1	1,920.1	0.0	1,866.0	2020/21 wheat production reflects latest NASS survey data for winter wheat.
Imports	105.0	105.0	0.0	140.0	Reduced U.S supplies and a larger Canadian crop support rising imports in 2020/21.
Supply, total	3,104.9	3,104.9	0.0	2,983.9	
<b>Demand</b>					
Food	955.0	962.0	7.0	964.0	Food use for 2019/20 is raised 7 million bushels this month on surging retail demand in the first calendar year quarter; as retail demand tapers off in April and May and into to the new marketing year, rising food service demand is forecast to mostly offset softening retail demand. Food use in 2020/21 is up on the outlook for strong consumption of staples.
Seed	60.0	60.0	0.0	61.0	
Feed and residual	135.0	135.0	0.0	100.0	Feed and residual use in 2020/21 is lowered on reduced wheat supplies and expectations for expanded corn feeding.
Domestic, total	1,150.0	1,157.0	7.0	1,125.0	
Exports	985.0	970.0	-15.0	950.0	Exports for 2020/21 are forecast below 2019/20 levels on a smaller U.S. crop and increased supplies for key several exporting nations.
Use, total	2,135.0	2,127.0	-8.0	2,075.0	Lower domestic use and exports combine to reduce 2020/21 utilization by 52 million bushels or 2.4 percent.
Ending stocks	969.9	977.9	8.0	908.9	On substantially lower supplies, year-to-year, carryout in 2020/21 is forecast to fall by 7 percent.
Season Average Farm Price	\$4.60	\$4.60	\$0.00	\$4.60	A sharp drop for corn prices in 2020/21 constrains wheat price growth, despite a tighter all-wheat balance sheet.

Source: USDA, World Agricultural Outlook Board *Supply and Demand Estimates*.

## Domestic Wheat Supplies Forecast at Lowest Level Since 2015/16 on Smaller Winter Wheat Crop

In the May 12 *Crop Production* report, winter wheat production is forecast at 1.25 billion bushels, a decline of 4 percent from 2019—largely on reduced yields—though production changes are variable across the U.S. (fig. 2). Hardest hit is Hard Red Winter (HRW) wheat production which is forecast down 12 percent from a year ago. In contrast, Soft Red Winter (SRW) wheat production is forecast to rise by 24 percent to 298 million bushels on a sizable increase in planted and harvested area. Lower winter wheat production is combined with the other spring wheat and durum harvests (projected only 5 million bushels lower than 2019) to reduce the all wheat production total in 2020/21. At 1,886 million bushels, U.S. wheat production is lower year-to-year but is larger than both the 2017/18 and 2018/19 all-wheat harvests. Declining production in the new marketing year combines with carryin that is estimated to be nearly 10 percent below the 2019 level resulting in substantially smaller supplies, year-to-year.

<b>2019/20</b>	<b>HRW</b>	<b>SRW</b>	<b>HWW</b>	<b>SWW</b>
Planted area (million acres)	22.458	5.201	0.434	3.066
Harvested area (million acres)	17.292	3.733	0.386	2.916
Production (million bushels)	833.181	239.166	19.954	211.702
<b>2020/21</b>				
Planted area (million acres)	21.7	5.69	0.451	2.969
Harvested area (million acres)	16.636	4.414	0.4359	2.866
Production (million bushels)	733.409	297.527	16.200	207.464

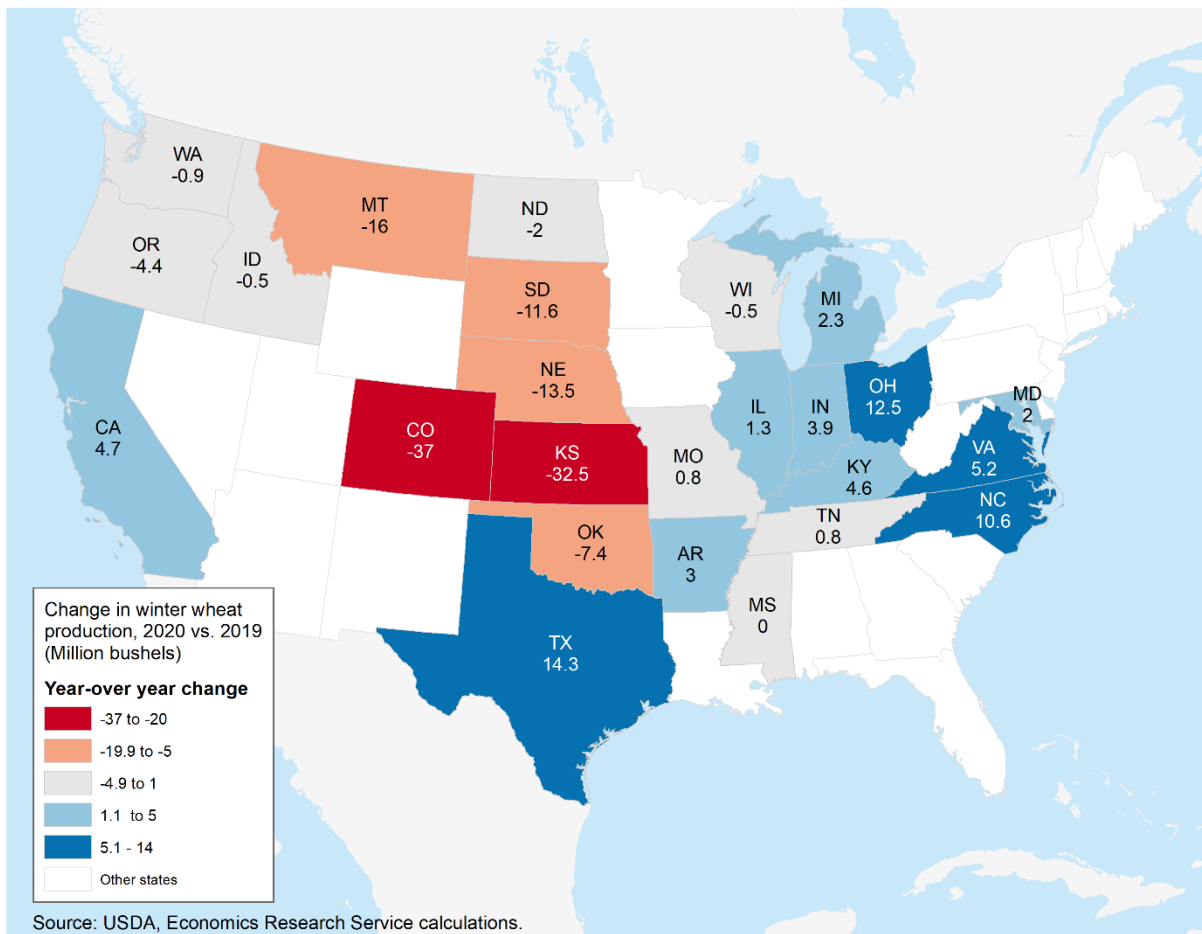
Note: Hard white winter wheat (HWW) and soft white winter (SWW) area planted is based on the aggregate winter white wheat planted area reported by NASS (3.42 million acres) and historical proportions between the two classes.

Maturity of the 2020 winter wheat crop is currently lagging the average pace. In Kansas, just 39 percent of the crop had headed as of the week ending May 10 compared with the 5-year average of 56 percent. Nationally, 44 percent of the 2020/21 winter wheat crop has headed whereas the 5-year average is 50 percent. Winter wheat conditions have fluctuated by region and over time this spring while generally falling across the nation. For the weeks ending April 5 and April 12, the percent of the U.S. crops rated “good” to “excellent” totaled 61 percent. Subsequent weeks saw that total fall from 57 percent to 54 percent, then up slightly to 55 percent before falling to 53 percent for the week ending May 10 (week #19). Cold and dry conditions have beset the growing crop, including a notable mid-April freeze event that is reported to have damaged some winter wheat. The percent rated “good” to “excellent” in week 19 of 2020 remains slightly above the 5-year average of 52 percent. However, winter wheat

yields as of May 1 are estimated by NASS at 51.9 bushels per acre, a decline of 1.9 bushels per acre from 2019.

Figure 2

**U.S. winter wheat production down in key winter wheat production States**



Sources: USDA, National Agricultural Statistics Service *QuickStats* data base and USDA, Economic Research Service calculations.

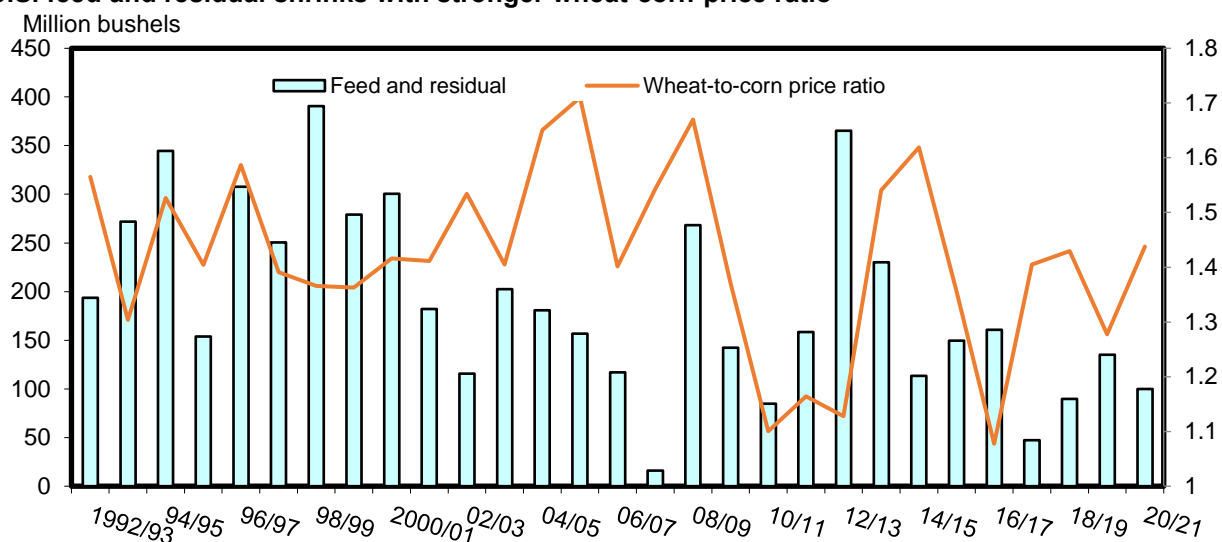
The first NASS forecast of other spring wheat and durum production for the 2020/21 marketing year will be released in July. Current projections are based on plantings intentions published in the March *Prospective Plantings* report, 1985-2019 yield trends (except CA, AZ, and Idaho durum) yields, and 10-year harvested-to-planted ratios. In the Northern Plains, wet and cold conditions have hampered planting and progress remains slow. Through the week ending May 10, 2020, USDA, NASS reports that 42 percent of the spring wheat crop was planted as compared with the 5-year average (2015-19) of 63 percent. North Dakota, a key spring wheat producing State where 53 percent of the 2019/20 spring wheat crop was sown, has the slowest planting progress. The most recent crop progress report indicates that North Dakota farmers had sown just 27 percent of intended acres compared with 56 percent the year prior.

On May 7, Statistics Canada released their delayed March planting intentions report. Results reflect data that was largely collected by March 16 and thus may be less representative than reports from previous years. Canadian farmers are expected to plant 25.4 million acres of wheat for the 2020/21 marketing year—an increase of a little more than 3 percent from the prior year and the highest in seven years. Leading the increase in wheat planted area is a surge in winter wheat plantings—up almost 54 percent year-to-year to 1.43 million acres. Spring wheat area is projected to be about level with 2019 sowings at nearly 19 million acres. Durum seedings are up about 7 percent to 5.3 million acres on sustained strong international demand, price strength, and tight North American supplies. Expanded supplies of spring and durum from Canada are likely to pressure U.S. price prospects, where the planting window for spring and durum remains open until as late as mid-June. With a smaller-than average share of the spring wheat crop planted, farmers may have increased capacity to adjust planting strategies to accommodate evolving market and sowing conditions.

## Domestic Utilization for 2020/21 Crop Expected to Fall Based on Sharp Cut to Feed and Residual Use

Domestic use for wheat is the sum of food, seed, and feed and residual use categories. In the new marketing year, modest gains for food and seed use are expected; however feed and residual use is projected down 26 percent to 100 million bushels (fig. 3).

Figure 3:  
**U.S. feed and residual shrinks with stronger wheat-corn-price ratio**

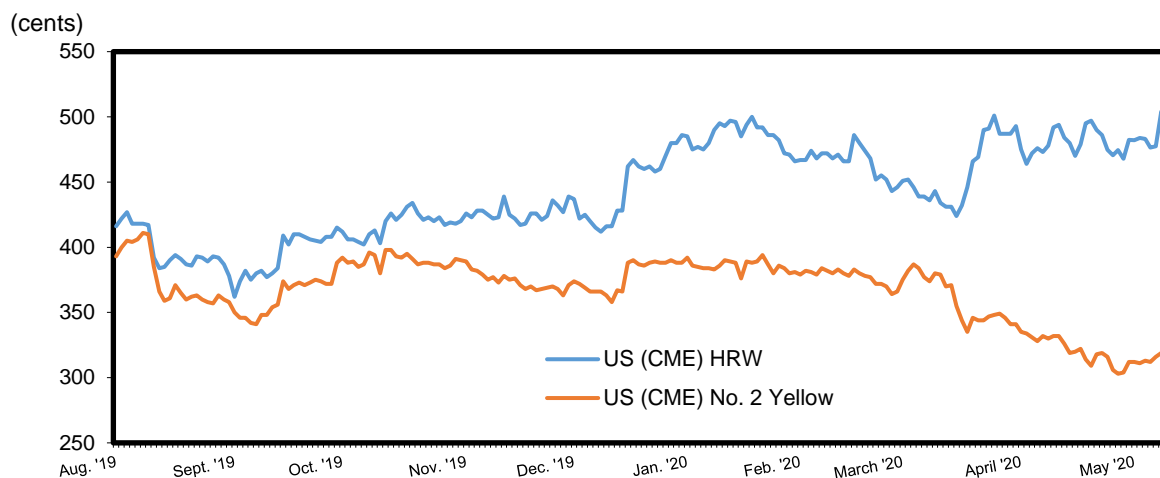


Sources: USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates* and USDA, Economic

Expectations for a smaller wheat crop put downward pressure on the feed and residual figure. However, the outlook for record-high corn supplies and relatively low corn prices—manifested as a very strong wheat-to-corn prices ratio—strongly implies that corn will displace wheat in feed rations. From August 2019 through March 2020, the average difference between the wheat and corn nearby futures contract was about \$0.55 per bushel (fig. 4). After March 2020, when widespread efforts to contain COVID-19 in the U.S. went into effect and through May 11, 2020, the average difference between the two contracts averaged \$1.34—clearly indicative of diversion and reflective of significant and contrasting marketplace changes for the two grains.

Figure 4

**Wheat and corn futures prices diverge on shifts in demand linked to COVID-19**



Notes: HRW is hard red winter wheat (11.5% protein). Corn contract is No. 2 Yellow. Price is the nearby contract. Source: Chicago Mercantile Exchange (CME).

Dry early spring conditions in key wheat production regions around the globe combined with a surge in retail flour and wheat product sales to boost futures and cash prices—a trend that generally continues today and supports the 2019/20 season average farm price forecast (SAFP) of \$4.60 per bushel. Stay-at-home orders greatly reduced driving and demand for fuel—10 percent of which is corn-based ethanol. The resulting drop in fuel ethanol demand combined with an OPEC-linked expansion of fuel production—creating excess global supplies and greatly reduced demand for U.S. corn for use in ethanol. In contrast to wheat prices, both cash and futures corn prices have weakened significantly in recent weeks and caused the corn 2019/20 SAFP to drop from \$3.80 per bushel in March to \$3.60 per bushel in May.

Historically, wheat and corn prices have tended to move together. However, the two grains have experienced very different market reactions following the COVID-19 outbreak. Further there is a divergent outlook for the 2020/21 crops—a marked drop in wheat supplies versus record-high corn production and supplies. As a result, wheat prices are expected to be largely insulated from the price erosion that is forecast for corn, though the very low corn price is expected to limit

additional gains for wheat cash prices while also serving to alter the mix of corn and wheat in expected in feed rations. The out-year wheat SAFP is projected at \$4.60, on par with the current 2019/20 forecast while the 2020/21 corn SAFP is down sharply to \$3.20 per bushel.

## Feature: COVID-19 Leads to Shifts in Consumer Food Purchases and Surging Wheat Food Use

In February, multiple industry publications began sharing news that flour production started to surge as the world began to brace for the full impact of COVID-19-linked stay-at-home orders. Sosland's *Milling and Baking News* reported that "the coronavirus pandemic has skyrocketed demand for bread and other baked foods and snacks and has many operations running around the clock." Another Sosland article noted "demand for bakery ingredients is up strongly across all ingredient categories as consumer demand has both shifted from foodservice to retail and surged at the very same time." Anecdotal reports of swiftly clearing flour and flour-products on grocery shelves was corroborated by a March Nielsen survey that reported that 54 percent of respondents are eating and cooking at home more than before COVID-19. An investigation into e-commerce demand impacts revealed online sales of baking mixes were up 489 percent from the same time a year ago and pretzel demand surged by a slightly less impressive 201 percent. Nielsen Retail Measurement Services further found that in the week after the pivotal February 29 press conference by President Trump, consumer spending on biscuit mixes and pasta rose 15 and 10.4 percent, respectively, above the same week last year.

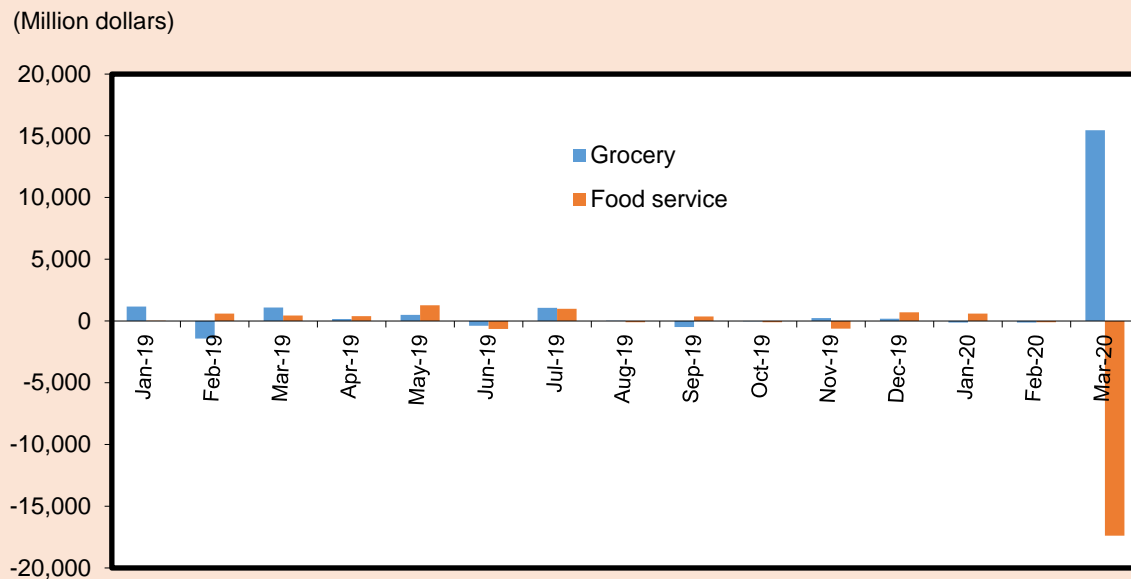
Through March, as many states imposed stay-at-home restrictions and moved to close all but "essential" businesses, consumer demand for wheat flour and food products continued to rise even as consumption of food eaten away from home fell decisively (fig. 5). At the time, the *Milling and Baking News* reported that "consumers continue to clamor for family flour at a pace not typically seen outside of the fall baking season." A Chicory survey sponsored by the *Milling and Baking News* found internet searches for home baked bread recipes in the first week of March to be up 355 percent compared with the same time in 2019. Early April views were down slightly, but still more than 3 times the number of pages views indicated for a year prior. Americans were clearly baking—and presumably eating—more bread and flour-based products than pre-COVID-19.

Since 2004, consumers have spent more money on food eaten away from home (food service) than food eaten at home with the share of food expenditures (constant dollars) peaking in 2017 at 53 percent of total. With foodservice options suddenly very limited post-COVID-19, consumers have quickly shifted purchases toward retail/grocery stores. According to U.S.



Bureau of the Census data, consumer spending at grocery stores in March was up 27 percent above February expenditures and up 30 percent relative to a year ago. In contrast, consumer spending on food eaten away from home was down 27 percent relative to the prior month and down 23 percent compared to a year earlier. While consumer purchasing patterns have clearly shifted as a result of efforts to slow the spread of COVID-19, what is less clear is the net impact on wheat food use. A key question is whether rising consumer purchases of wheat and wheat products at grocery stores have offset lost food service demand.

Figure 5  
**U.S. food spending shifted radically in the first month of COVID-19 stay-at-home orders**



Sources: U.S. Department of Commerce, Bureau of the Census; USDA, Economic Research Service calculations, and David Boussios of the USDA, World Agricultural Outlook Board.

The May 1, 2020, USDA, NASS *Flour Milling Products* report provided evidence of the net early impact of the COVID-19 induced shifts in consumer purchases on wheat food use. For the first 3 months of 2020, trade-adjusted wheat food use was found to be 4 percent above the same period in 2019. Before the release of first (calendar year) quarter data from NASS, U.S. wheat for food use figures were running virtually on par with 2018/19 figures and on pace to reach the annual 955-million-bushel initial food use projection. The milling data showed that consumer demand for wheat began to surge in January-as COVID-19 began to garner increasing media attention, but before the implementation of extensive measures to reduce spread in the U.S.

Demand for wheat flour and products in January exceeded the 2019 estimate by nearly 3 million bushels. Before widespread stay-at-home orders, food use in February was like the January pattern and exceeded the prior year's food use by more than 3 million bushels. In March, with

many U.S. residents staying at home from school and work, a surge in grocery store spending and wheat food use was expected, and realized, with wheat food use figures up 3.2 million from the same month a year prior. After matching monthly wheat food use from 2018/19 through the first 7 months of the 2019/20 marketing year, the last 3 months of food use contributed to a net gain of 9.2 million bushels of estimated food use through March. Forecast food use for the current marketing year is raised 7 million bushels to 962 million, based on the conservative expectation that April and May 2020 food use matches those months for 2019.

Food use estimates for April and May are not expected to show the same pattern of tremendous year-to-year growth as the January-February-March estimates. Part of the first quarter (calendar year) surge was based on stocking up behavior; demand for bulk family flour is expected to soften in April and May. As the economy slowly re-opens, it is expected that consumers will shift purchases away from staples at the grocery store and increasingly towards food eaten away from home, per the long term pre-COVID-19 trend. Also, with the U.S. unemployment rate currently estimated at 14.7 percent, the economic downturn is forecast to cause budget tightening and more efficient home consumption which could limit food waste and constrain category growth. Limitations on the size of social gatherings where wheat-based food products are often featured (e.g., buns for hotdogs and hamburgers) and rising costs associated with complimentary meat products is also expected to inhibit wheat food use growth, especially as warmer weather returns.

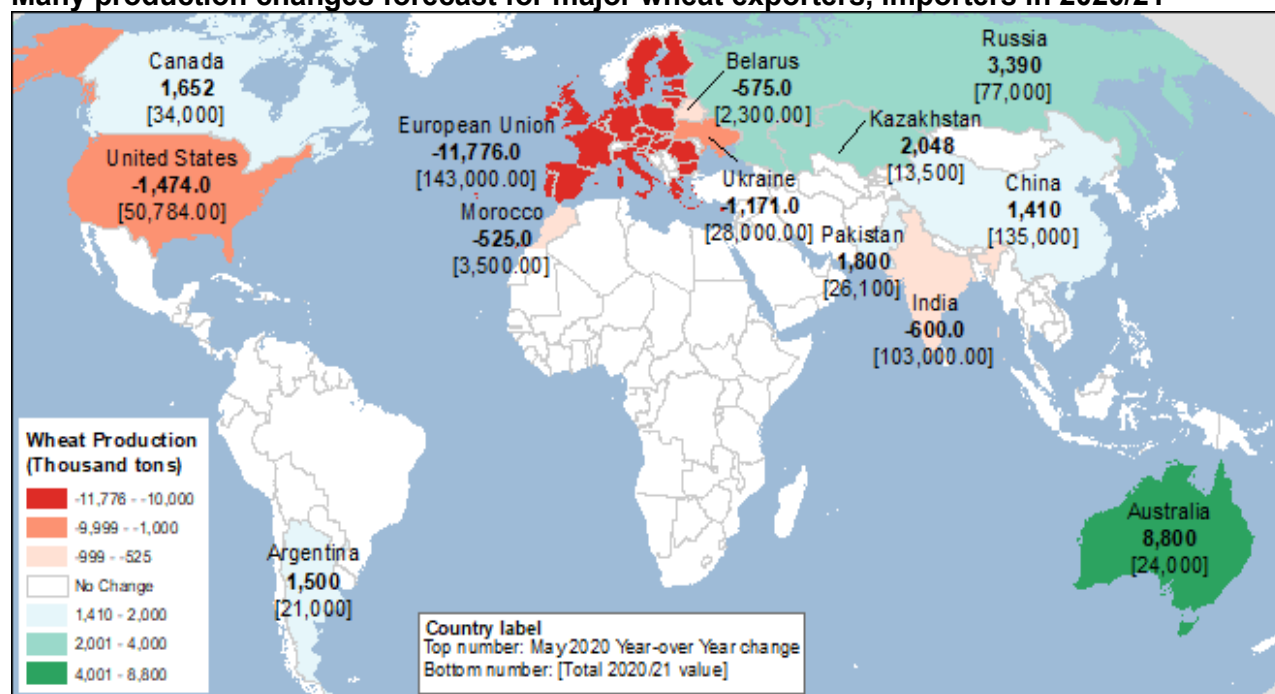
Wheat food use for 2020/21 is projected 2 million bushels higher to 964 million as the unseasonable increase in use that is reflected in the first calendar year quarter use figures reverts to a long-term trend. USDA expects the gradual re-opening of the U.S. economy in the latter half of 2020 to increase wheat food demand by the food service sector but growth in this category is expected to be partially offset by reduced home consumption as stay-at-home requirements ease. The continued weak U.S. economic growth in the last half of 2020 is also expected to temper wheat food use for 2020/21.

# International Outlook

## Global Production for 2020/21 is Forecast at a Record 768 Million Tons

While production for the U.S. is forecast to decline, for most other major exporting nations, the 2020/21 wheat harvest is expected to be larger than the previous marketing year (fig. 6). In the Black Sea region, **Russia** is forecast to expand wheat area and, despite some early regional dryness—particularly in the Southern and Northern Caucasus, yields are forecast up 4 percent from last year to 2.8 metric tons per hectare—the second highest on record. Total Russian wheat production for 2020/21 is 77 million metric tons of which about 70 percent is winter wheat. With substantial exportable supplies forecast for the new marketing year, Russia is projected to continue to be a formidable competitor in international markets and to regain its position as the top wheat-exporting nation.

Figure 6  
**Many production changes forecast for major wheat exporters, importers in 2020/21**



Source: USDA, Foreign Agricultural Service, *Production Supply and Distribution* database and USDA, Economic Research Service calculations.

Another Black Sea competitor, **Kazakhstan**, is forecast to see production rise on higher yields after last year's drought led yields to fall to the lowest level since 2012/13. **Canada's** wheat crop is forecast up on expanded area for most classes of wheat and recent favorable cultivation conditions. Winter wheat and durum planted area are up sharply—and will provide competition

for comparable U.S. grains. **Argentina's** wheat crop is also forecast to exceed last year's record production at 21 million metric tons. The Argentine wheat crop is projected to exceed the previous record production by 1.5 million metric tons on improved yields (up 0.3 tons per hectare) despite no expected increase in harvested area. Argentina is expected to remain a formidable competitor for South American wheat business, especially in the Brazilian market.

In contrast to the production gains noted previously, the **European Union** (EU 27 plus United Kingdom) wheat harvest is forecast to decline sharply on a sizable drop in harvested area and lower yields. Wheat production for the EU is forecast at 143.0 million metric tons down 11.8 million and 8 percent below last year's harvest. Harvested area is estimated at 25.3 million hectares, about 3 percent below last year's figure—largely on reduced sowings in the UK, France, and other northwestern EU countries—as they all suffered from the effects of excessive rainfall and soil moisture during the winter planting season. In France, area harvested is expected to be the lowest since 2001/02.

## China and India FSI Demand Spurs Rise in Global Consumption to New Record-High

Global food, seed, and industrial (FSI) use has trended up in recent years, largely on population growth, but also in response to rising incomes and increased “westernization” of diets and urbanization in developing countries. While economic growth is expected to stall in the new marketing year, due partly to COVID-19, the effect of a growing global population on FSI demand is forecast to more than offset negative economic influences. Leading the way towards increased global consumption are China and India—as both are expected to harvest large crops and to have abundant domestic supplies available for use. The net 9.4 million-metric ton projected growth in global FSI for 2020/21 is predominately because of a 5.89 million metric ton combined increase in FSI for these two nations, representing 63 percent of total growth. Other areas of fast-rising FSI use in recent years include Sub-Saharan Africa and Southeast Asia, however, in these regions expected economic slowdowns are forecast to curtail the rate of FSI growth in the new marketing year.

Increasing global demand for wheat FSI outside of India and China is projected to help lift global trade by 2 percent in the new marketing year. Imports are forecast up a little more than 3.0 million metric tons on rising demand from several North African countries including Tunisia, Morocco, and Algeria, as well as, key Southeast Asian importers Vietnam and Malaysia. On smaller harvests, the EU and U.S. are also expected to expand imports in the new marketing year. In 2019/20, Egypt imported 13.0 million metric tons of wheat and is expected to match this

volume of imports in 2020/21 thereby retaining its position as the leading wheat importer in the world. After importing a record-high volume of wheat in 2019/20, Turkey is projected to reduce imports by 3 million metric tons to 7.5 million on both ample stocks and expectations for increased supplies.

## Global Wheat Feed Use Projected to Fall on Shift Towards Corn in Rations

The global coarse grain outlook for 2020/21 is for record-large supplies, largely on expectations for record-high corn production. Growth in corn production is forecast for the U.S., Brazil, Ukraine, Mexico, and Canada and contributes to a 4 percent increase in global corn use. Expanded corn use across the globe is partially attributable to expanded feed use, raised from 704 million metric tons in 2019/20 to 729 million in 2020/21. Rising corn feeding contrasts with an expected contraction in global wheat feeding, lowered 5.9 million metric tons to 137.5 million in 2020/21. The largest year-to-year reductions are for the EU (-2.5 million metric tons), Australia (-1.2 million), the U.S (-0.95 million), and Canada (-0.7 million). In all cases, but Australia, reductions in wheat feeding are attributed to expanded availability of corn supplies. For Australia, the outlook for reduced feedings stems from increasing soil moisture and associated expectations for improved pasture conditions, along with expanded barley and sorghum feeding.

## On Rising Carryout for China and India, Global Ending Stocks Set to Reach Record-High

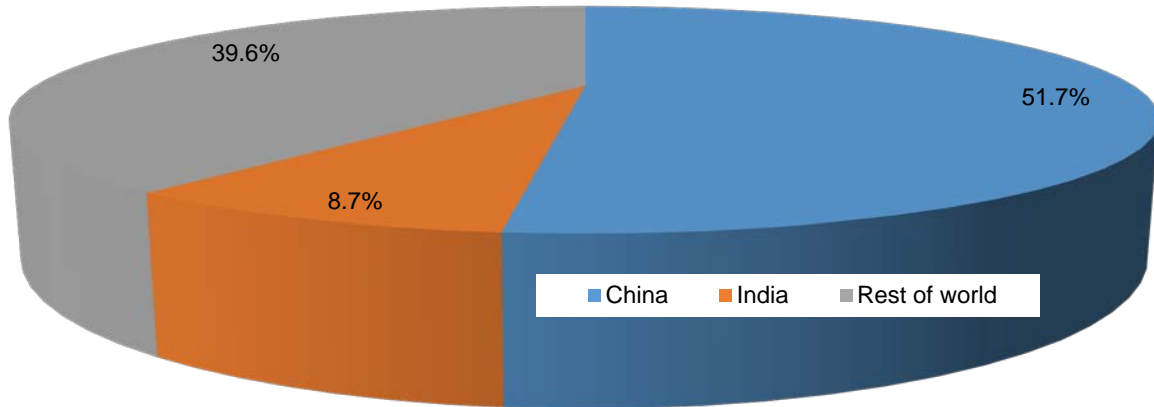
Despite rising consumption in both China and India, both countries are forecast to add to their already abundant stocks in 2020/21. Production in both countries has trended above consumption and neither country is a significant exporter of wheat. Consequently, wheat stocks have tended to accumulate, especially in China—which is now projected to hold a little more than 160 million metric tons or about 52 percent of total global wheat stocks—and India, which is set to become the second-largest holder of wheat stocks at 27 million metric tons (fig. 7).

When China and India's stocks are removed from the global total, carryout for the rest of the world is forecast to rise fractionally (+1.97 million metric tons) in 2020/21 to 122.7 million. Several major exporting countries such as Canada, Ukraine, Russia, Argentina, and Australia are forecast to see their stocks increase slightly, largely on expanded production.

Figure 7

**China and India combine to account for more than 60% of total 2020/21 global wheat stocks**

Share of total 2020/21 global wheat ending stocks



Sources: USDA, Foreign Agricultural Service, *Production, Supply, and Distribution* database and USDA, Economic Research Service calculations.

Stocks for the U.S. are projected down about 7 percent in the new marketing year to 24.7 million tons—the lowest since 2014/15. Even with this projected decline, the U.S. is expected to hold about 20 percent of the balance of stocks (world less India and China)—the largest volume among the major exporting countries.

## Suggested Citation

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