



# Sugar and Sweeteners Outlook

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**In this report:**

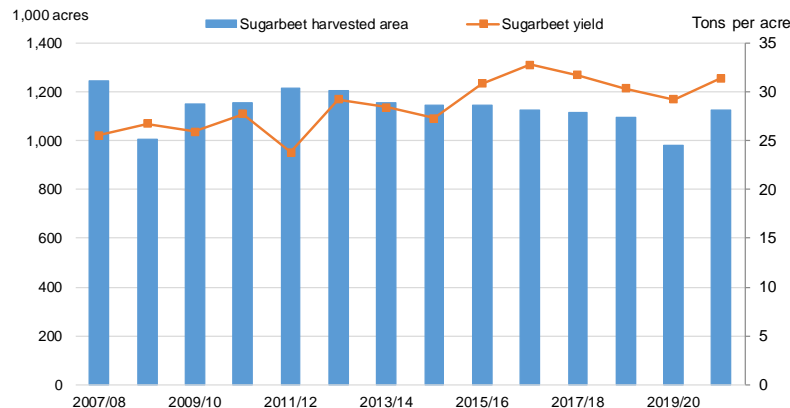
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## Increased Beet Sugar Production Raises Ending Stocks for 2020/21

Higher expected domestic production from the sugarbeet sector offsets lower cane sugar production, beginning stocks, and imports to raise projected ending stocks in 2020/21. Domestic deliveries and total use projections remain unchanged from the previous month's forecast. Lower production and import estimates reduce supplies and ending stocks for 2019/20. The stocks-to-use ratio is forecast to be 14.3 percent and 14.6 percent for 2019/20 and 2020/21, respectively.

With the sugarcane harvest season complete, Mexico sugar production for 2019/20 is estimated to be 17.9 percent lower than the year prior. Domestic deliveries are increased from the previous month's estimate, based on a strong pace through June. Ending stocks are lowered from the July forecast as a result. Export estimates remain unchanged. For 2020/21, dry conditions continue in some parts of Mexico's sugarcane-producing regions, lowering projected production.

Sugarbeet harvested area and yields, 2007/08 to 2020/21



Source: USDA, National Agricultural Statistics Service.

# United States Outlook

## Higher Yields Boost Beet Sugar Production Forecasts

In the USDA's August *World Agricultural Supply and Demand Estimates (WASDE)*, U.S. supplies of sugar in 2020/21 totaled 14.053 million short tons, raw value (STRV), a 132,000-STRV increase from the previous month. Higher domestic production more than offsets lower beginning stocks and imports.

**Table 1: U.S. sugar: Supply and use by fiscal year (Oct./Sept.), August 2020**

Items	2018/19	2019/20	2020/21	2018/19	2019/20	2020/21
		(estimate)	(forecast)	(estimate)	(forecast)	
	1,000 Short tons, raw value			1,000 Metric tons, raw value		
Beginning stocks	2,008	1,783	1,744	1,822	1,617	1,582
Total production	8,999	7,989	9,265	8,163	7,247	8,405
Beet sugar	4,939	4,244	5,199	4,480	3,850	4,716
Cane sugar	4,060	3,745	4,066	3,683	3,397	3,689
Florida	2,005	2,106	2,135	1,819	1,910	1,937
Louisiana	1,907	1,513	1,850	1,730	1,372	1,678
Texas	147	126	81	134	115	73
Hawaii	0	0	0	0	0	0
Total imports	3,070	4,162	3,044	2,785	3,776	2,761
Tariff-rate quota imports	1,541	2,238	1,565	1,398	2,030	1,420
Other program imports	438	350	350	397	318	318
Non-program imports	1,092	1,575	1,129	990	1,429	1,024
Mexico	1,000	1,395	1,079	908	1,265	979
High-duty	91	180	50	83	163	45
Total supply	14,076.75	13,934	14,053	12,770	12,641	12,748
Total exports	35	35	35	31	32	32
Miscellaneous	28	0	0	26	0	0
Deliveries for domestic use	12,231	12,155	12,230	11,096	11,027	11,095
Transfer to sugar-containing products						
for exports under re-export program	98	80	80	89	73	73
Transfer to polyhydric alcohol, feed, other alcohol	27	25	25	25	23	23
Commodity Credit Corporation (CCC) sale for ethanol, other	0	0	0	0	0	0
Deliveries for domestic food and beverage use	12,106	12,050	12,125	10,982	10,932	11,000
Total use	12,294	12,190	12,265	11,153	11,059	11,127
Ending stocks	1,783	1,744	1,788	1,617	1,582	1,622
Private	1,783	1,744	1,788	1,617	1,582	1,622
Commodity Credit Corporation (CCC)	0	0	0	0	0	0
Stocks-to-use ratio	14.50	14.31	14.58	14.50	14.31	14.58

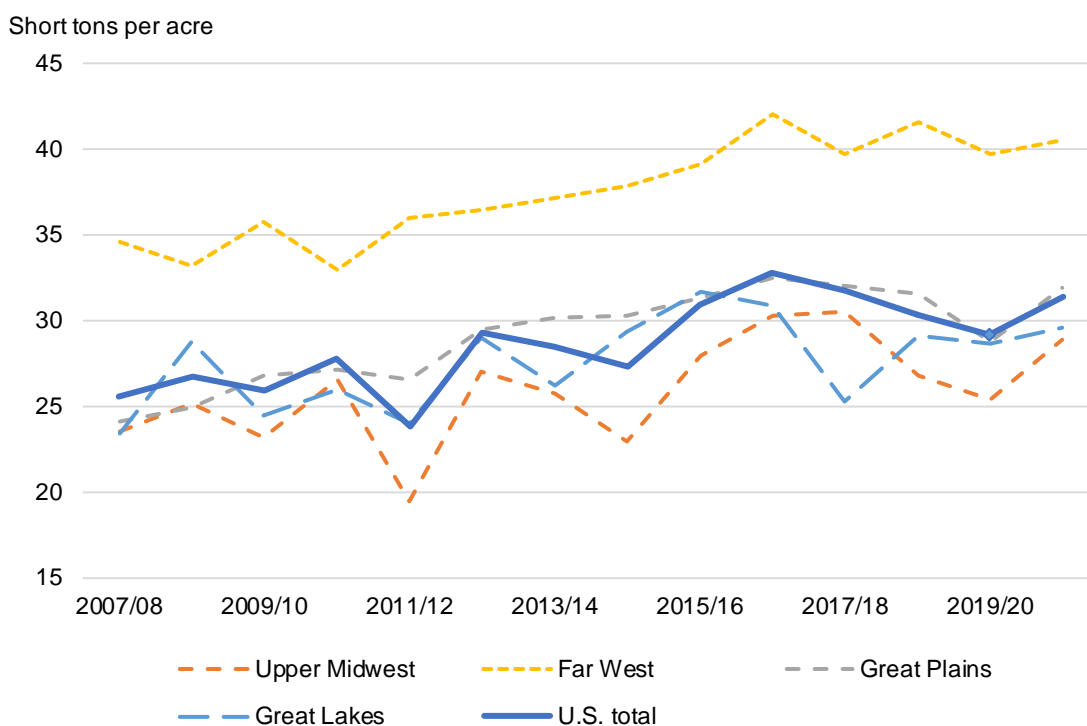
Source: USDA, Economic Research Service, Sugar and Sweeteners Outlook.

Domestic production is projected to be 9.265 million STRV, a 175,000-STRV increase from the previous month. The changes come as the National Agricultural Statistics Service (NASS) released its first yield forecasts for the 2020/21 sugarbeet and sugarcane crops in its August 12 *Crop Production* report.

Beet sugar production is raised 199,000 STRV to 5.199 million STRV. NASS forecasts sugarbeet production increasing 23.8 percent from 2019/20, based on a national yield forecast of 31.4 short tons per acre. Planted and harvested acre forecasts remained unchanged from the June *Acreage* report.

If realized, the yield forecast would be the highest since 2017/18, after consecutive years of challenging harvest conditions that reduced yields and production. Yield forecasts show higher yields for every sugarbeet-producing State. The Upper Midwest region that includes North Dakota and Minnesota is expected to have the strongest year-over-year increase in yield for 2020/21 (13.8 percent), followed by the Great Plains (10.9 percent). These regions were the hardest hit by wet, cold weather conditions during the 2019/20 harvest.

Figure 1  
**Yields, sugarbeets, by region, 2007/08 to 2020/21**



Source: USDA, National Agricultural Statistics Service.

Harvest will begin in some regions in late August with sugarbeets processed during the early-season production period. Most sugarbeets will be harvested between October and December, however. As a result, weather conditions will remain an important component of the beet sugar forecast heading into the fall. Harvest and production in the early season may affect the 2019/20 beet sugar production estimate, as sugar produced before October 1 will be accounted for in the

2019/20 fiscal year. Beet sugar production for 2019/20 is lowered 12,000 STRV in the August WASDE to 4.244 million STRV, however, based on the current sucrose extraction rate reported by processors through June.

**Table 2: Beet sugar production projection calculation, 2019/20 and 2020/21**

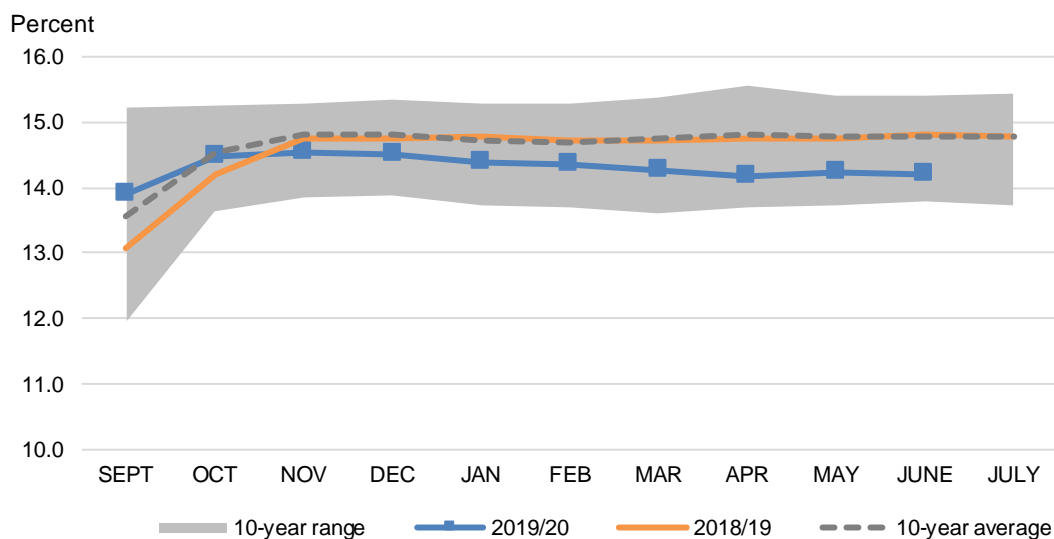
	2015/16	2016/17	2017/18	2018/19	2019/20	2019/20	2020/21	2020/21
					July	August	July	August
Sugarbeet production (1,000 short tons) 1/	35,371	36,881	35,325	33,282	28,600	28,600	33,929	35,393
Sugarbeet shrink	6.5%	8.3%	7.3%	5.2%	5.7%	5.7%	6.6%	6.6%
Sugarbeet sliced (1,000 short tons)	33,066	33,834	32,742	31,561	26,984	26,984	31,696	33,063
Sugar extraction rate from slice	14.58%	13.72%	15.18%	14.77%	14.20%	14.11%	14.51%	14.51%
Sugar from beets slice (1,000 STRV) 2/	4,820	4,643	4,970	4,660	3,832	3,807	4,599	4,798
Sugar from molasses (1,000 STRV) 2/	380	352	368	352	337	350	360	360
Crop-year sugar production (1,000 STRV) 2/	5,201	4,995	5,338	5,012	4,169	4,157	4,959	5,158
August-September sugar production (1,000 STRV)	688	606	715	655	582	582	633	633
August-September sugar production of subsequent crop (1,000 STRV)	606	715	655	582	633	633	638	638
Sugar from imported beets (1,000 STRV) 3/	--	--	--	--	36	36	36	36
Fiscal year sugar production (1,000 STRV)	5,119	5,103	5,279	4,939	4,256	4,244	5,000	5,199

1/ USDA, National Agricultural Statistics Service for historical data. 2/ August-July basis. 3/ Sugar from imported beets split out for projections only, included in total once full crop-year slice is recorded. Sugar from imported beets is incorporated into total production in historical data.

Note: STRV = short tons, raw value.

Source: USDA, Economic Research Service and World Agricultural Outlook Board.

**Figure 2**  
**Cumulative sugar extraction rate, beet sugar produced per sugarbeet sliced, by crop year**



Source: USDA, Economic Research Service and Farm Service Agency.

## Cane Sugar Production Lowered on Lower Sugarcane Forecast Production in Texas

Cane sugar production is projected to be 4.066 million STRV in 2020/21, a 24,000-STRV reduction from the previous month. Production in Texas is reduced 54,000 STRV to 81,000

STRV based on lower yields reported in the *Crop Production* report. Hurricane Hanna affected the region of south Texas where sugarcane is produced. Texas sugarcane yield is currently forecast at 21.9 short tons per acre, which would be a 34.8-percent decline from the previous year.

**Table 3: U.S. sugarcane and cane sugar production, by State, 2015/16 to 2020/21**

	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	Annual change Percent
<b>Florida</b>							
Sugarcane harvested for sugar (1,000 acres)	398	392	397	397	397	394	-0.7
Sugarcane yield (short tons per acre)	42.5	40.3	40.9	41.7	42.8	44.1	3.0
Sugarcane production (1,000 short tons)	16,915	16,120	16,237	16,555	16,992	17,393	2.4
Recovery rate (percent)	12.8	12.7	12.2	12.1	12.4	12.3	-0.7
Sugar production (1,000 STRV)	2,173	2,055	1,983	2,005	2,100	2,135	1.7
<b>Louisiana</b>							
Sugarcane harvested for sugar (1,000 acres)	385	400	414	425	442	452	2.3
Sugarcane yield (short tons per acre)	29.6	28.8	32.5	35.3	27.7	30.6	10.5
Sugarcane production (1,000 short tons)	11,396	11,520	13,455	15,003	12,243	13,842	13.1
Recovery rate (percent)	12.5	14.2	13.8	12.5	12.4	13.4	8.1
Sugar production (1,000 STRV)	1,428	1,632	1,862	1,875	1,513	1,850	22.3
<b>Texas</b>							
Sugarcane harvested for sugar (1,000 acres)	35	38	41	38	31	34	8.7
Sugarcane yield (short tons per acre)	31.4	37.0	36.8	36.6	33.6	21.9	-34.8
Sugarcane production (1,000 short tons)	1,105	1,395	1,490	1,376	1,052	745	-29.2
Recovery rate (percent)	10.5	9.9	11.3	10.7	12.1	10.9	-10.0
Sugar production (1,000 STRV)	116	138	169	148	127	81	-36.3

Note: STRV = short tons, raw value.

Source: USDA, Farm Service Agency; USDA, National Agricultural Statistics Service.

Increased cane sugar production in Florida partially offsets the decline in Texas. Cane sugar production in Florida is projected to total 2.135 million STRV, a 30,000-STRV increase from the previous year. NASS forecasts Florida's sugarcane production and yield to increase 2.4 percent and 3.0 percent, respectively, allowing for the increased outlook for sugar production in the State.

Louisiana cane sugar production is projected to be 1.850 million STRV, unchanged from the previous month. Sugarcane yields in the State are forecast to be 30.6 short tons per acre—an increase from the previous year's total of 27.7 but below the record in 2017/18 of 35.3 short tons per acre. Harvested area is currently forecast at record levels for 2020/21.

## U.S. Food and Beverage Deliveries Remain Strong Relative to Pace, but Demand Uncertainties Remain in the Future

Food and beverage deliveries in the United States are estimated at 12.050 million STRV for 2019/20 and projected to be 12.125 million STRV in 2020/21, both unchanged from the June forecast. Likewise, total use forecasts are unchanged at 12.155 million STRV and 12.230 million STRV for 2019/20 and 2020/21, respectively.

Although forecasts remain unchanged, several factors and key trends prevalent in the market create the potential for change. Through June 2020, deliveries in 2019/20 are 1.1 percent higher than the previous year. As has been expected, due to the reduction in beet sugar production and the increase in the raw sugar tariff-rate quotas (TRQs), deliveries from beet processors are down 11.4 percent and deliveries from cane refiners are 4.0 percent higher than a year ago.

**Table 4: Food and beverage deliveries, 2014/15 to 2019/20, October through June**

	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	Annual change
	1,000 short tons, raw value						Percent
Beet sugar processors	3,560	3,372	3,962	3,909	3,738	3,314	-11.4
Cane sugar refiners	4,579	4,766	4,509	4,496	4,690	4,879	4.0
Total reporters	8,139	8,138	8,471	8,405	8,428	8,192	-2.8
Non-reporter, direct consumption	548	546	519	449	543	874	61.0
Total deliveries	8,686	8,685	8,990	8,854	8,971	9,066	1.1
Final fiscal year deliveries 1/	11,921	11,881	12,102	12,048	12,106	12,050	-0.5

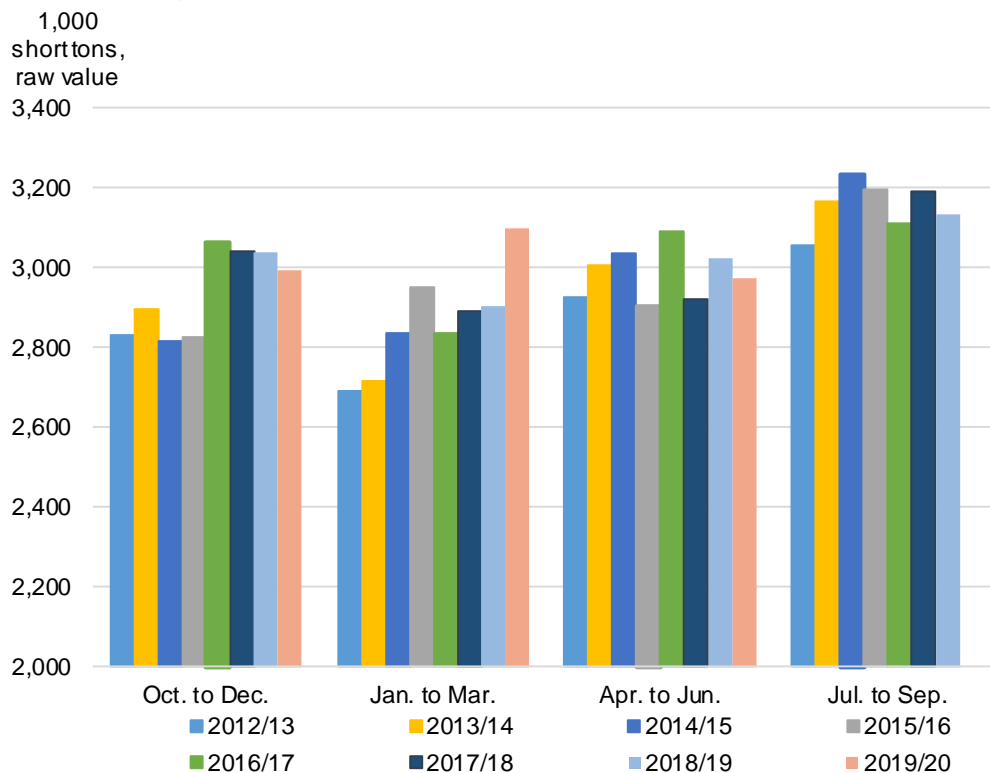
1/ Latest *World Agricultural Supply and Demand Estimates* estimate for 2019/20.

Source: USDA, Farm Service Agency.

Deliveries from non-reporters are 61.0 percent higher than the year prior. The increase is due to rises in the World Trade Organization (WTO) refined TRQ, increased high-tier imports due to price differentials between the world futures markets and the U.S. wholesale market, and a higher proportion of sugar entering under Free Trade Agreements being higher polarity sugar that doesn't require additional refining. The higher non-reporter deliveries may have important implications for seasonal patterns of deliveries and the July-to-September quarter of sugar deliveries.

The year-over-year increase in deliveries through the first three quarters of the fiscal year is largely due to non-reporter deliveries being 105.1 percent and 173.8 percent higher in the second and third fiscal quarters, respectively. The January-to-March quarter recorded the highest amount of deliveries thus far in 2019/20, despite usually being the lowest quarter for deliveries. This change in seasonal pattern is due to the relatively low domestic supplies immediately after the sugarbeet harvest, concerns about the utilization capacities of the U.S. refining sector, and the expectation of very tight refined sugar supplies for the summer of 2020—all of this prior to the U.S. market effects of the COVID-19 pandemic. The surge in non-reporter deliveries between January and March was in response to this expected tightness. With non-reporter deliveries being recorded at the time of their entry into the U.S. market, the sudden shift in sugar markets caused by the reactions to the COVID-19 pandemic lockdowns, and the constrained supplies from the domestically produced beet and cane processors until the harvest of the 2020 crops, the normal delivery seasonal patterns may be upended from typical patterns. As a result, despite pace-to-date deliveries showing an increase from the previous year, the current outlook for 2019/20 is for deliveries to decline relative to 2018/19.

Figure 3  
**Total U.S. sugar deliveries, quarterly, 2012/13 to 2019/20**



Source: USDA, Farm Service Agency.

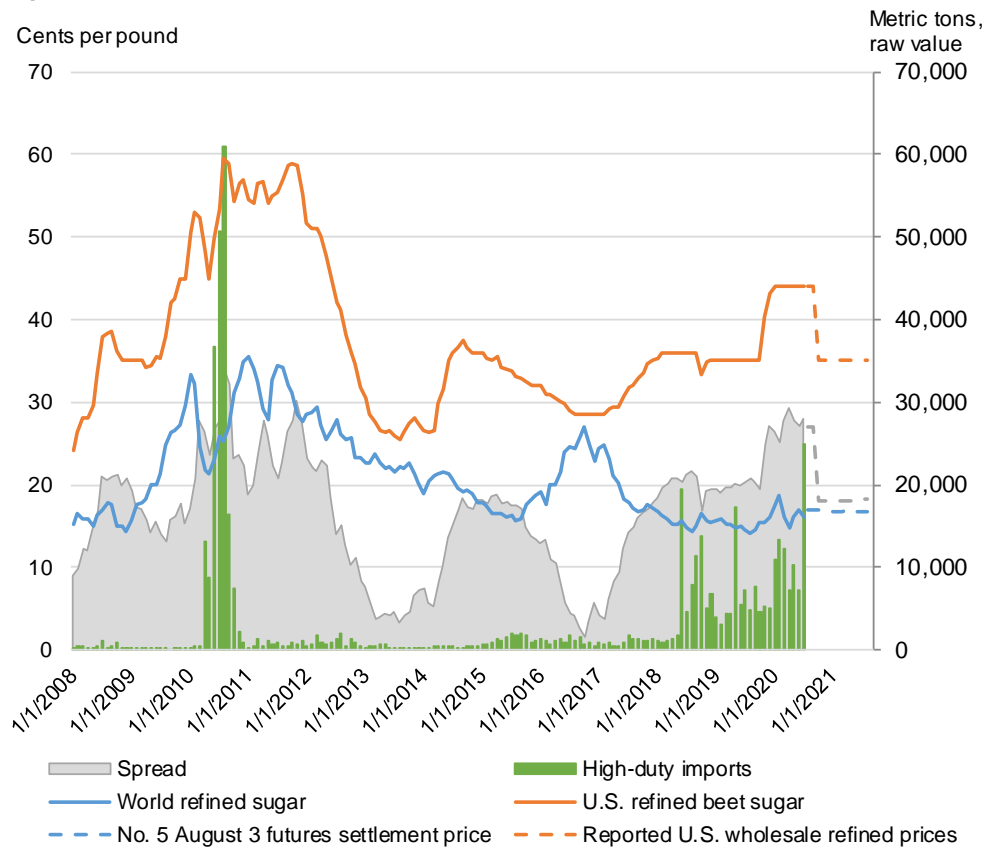
Deliveries for 2020/21 are projected to increase from current 2019/20 levels, as the market is expected to return to more normal seasonal and long-term demand patterns. The return is predicated on a stabilization of consumption and marketing patterns that will be affected by public health and macroeconomic factors. It is also predicated on the domestic production sector increasing output in line with historical trends—as is currently forecast but will be sensitive to weather conditions during each crops’ respective harvest and production seasons.

## High-Tier Tariff Imports Reduced As Demand and Prices Weaken

U.S. sugar imports are estimated to be 4.162 million STRV in 2019/20, a 15,000-STRV decline from the previous month. Imports under the quota program are estimated to be 2.238 million STRV, a 35,000-STRV increase. The shortfall in the WTO raw sugar TRQ is lowered to 61,000 STRV. Additionally, imports from Canada under the new United States-Mexico-Canada Agreement provision that went into effect in July are increased 12,000 STRV, as more of Canada’s calendar year 2020 quota are expected to enter by September 30.

This increase is more than offset by a 50,000-STRV reduction in high-tier tariff imports—totaling 180,000 STRV in the August WASDE. Sugar imports entering under the full duty rates were expected to surge in the spring and summer, just as tight domestic supplies were expected to be most prominent. Even after the USDA increased the WTO refined TRQ amounts in April, which allowed many arranged shipments to enter under the quota, remaining shipments were expected to clear Customs and enter the U.S. market at the full duty rate. After the market impacts of the COVID-19 pandemic in the United States affected sugar deliveries and abruptly changed marketing channels, as well as reported pricing for sugar in 2020/21 showed lower prices, high-tier tariff imports have been elevated, but not as high as initially expected. The current forecast assumes that all sugar that has entered the United States will eventually leave bonded warehouses and enter the U.S. market—although some of those imports may be pushed into 2020/21. The volume of sugar that was expected to enter the market is no longer expected, though, due to the changed market conditions.

Figure 4  
**U.S. and World refined sugar prices, monthly, January 2008 to September 2021**



Source: USDA, Economic Research Service.



Imports in 2020/21 are projected to be 3.056 million STRV, a 3,000-STRV reduction from July. The reduction reflects the shortfall in the WTO refined sugar TRQ—the result of the United States Trade Representative announcing the country assignments of the 15,000-STRV quota.

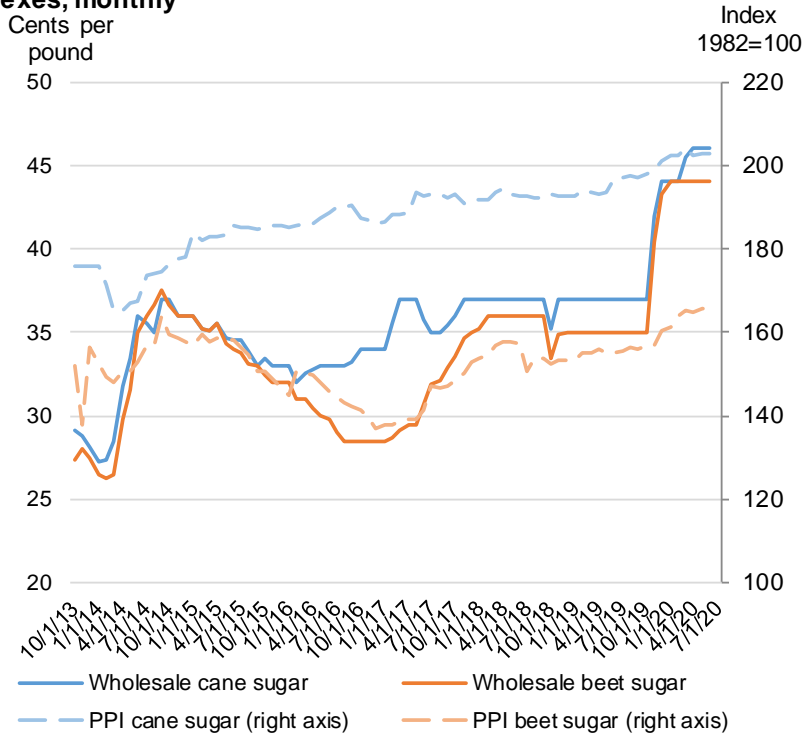
Imports from Mexico are unchanged for the 2019/20 estimate and 2020/21 projection, at 1.395 million STRV and 1.079 million STRV, respectively. The 2020/21 projection reflects the U.S. Department of Commerce's calculation of U.S. Needs based on the July WASDE, in accordance with the Suspension Agreements. The next calculation by the Department will be done after the September WASDE.

## Ending Stocks Lowered for 2019/20 but Raised for 2020/21, 2019/20 Refined Sugar Prices Remain Flat

U.S. ending stocks are estimated to be 1.744 million STRV for 2019/20, or a 14.31 percent stocks-to-use ratio. This is a slight reduction from the previous month's 14.54 percent. For 2020/21, the stocks-to-use ratio is projected to be 14.6 percent, up from the July projection of 13.5 percent.

Refined sugar prices in the United States have remained relatively stable over the past several months. Wholesale spot prices for refined beet and cane sugar have been 44 and 46 cents per pound, respectively, for the past several months, even with the market impacts of COVID-19. This has been mirrored by the Bureau of Labor Statistics' Producer Price Indexes (PPIs) for each refined sugar, which ticked upward in March 2020 but have since leveled out. The wholesale spot prices are elevated relative to the previous year, primarily due to the lower domestic production. However, prices are anticipated to be more in line with historical levels in 2020/21, particularly after January 2021. Reports are that sugars scheduled to be delivered in the next calendar year are being contracted at 35 cents for beet sugar and 36.5 cents for cane sugar.

Figure 5  
**Refined sugar prices, wholesale and Producer Price  
 Indexes, monthly**



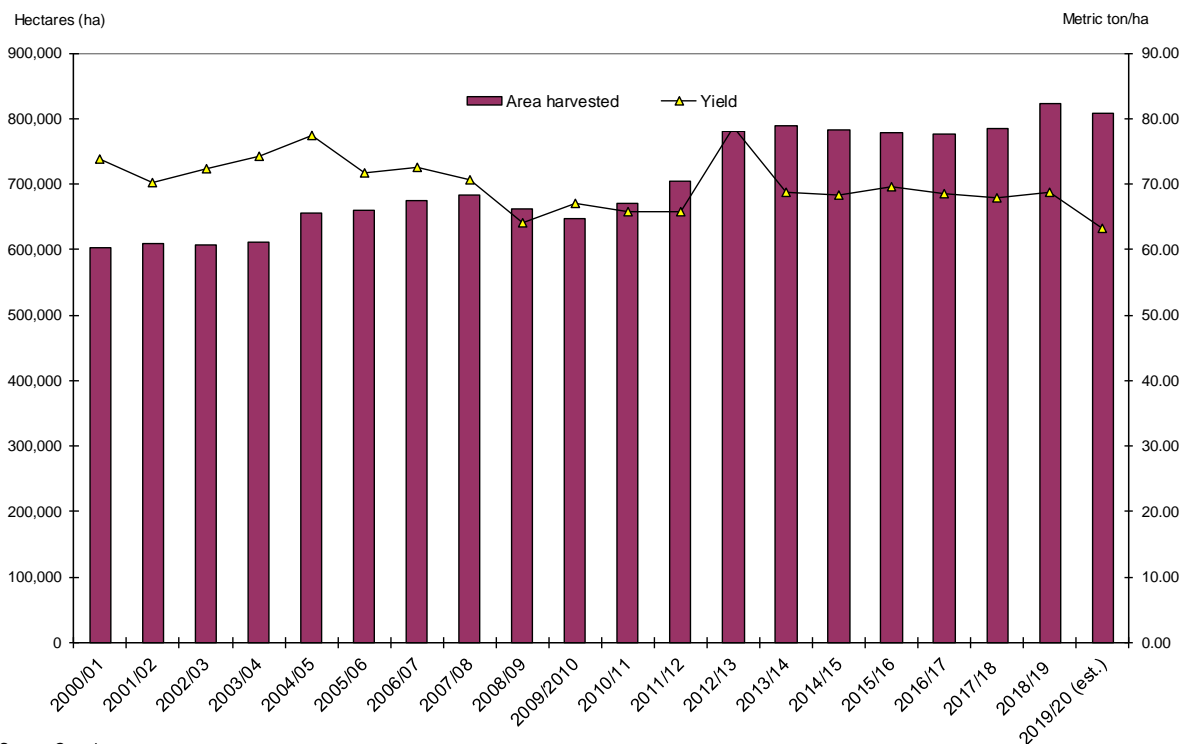
Note: Produce Price Index (PPI)  
 Source: USDA, Economic Research Service.

# Mexico Outlook

## Mexico Harvest Concludes for 2019/20, Dryness Persists in Some Key Regions

Mexico sugar production for 2019/20 is estimated at 5.278 million metric tons, actual value (MT)—a slight 4,000-MT decrease from the July estimate, as all mills have concluded their processing season. This puts production 17.9 percent lower than 2018/19. The reduction is largely due to sharply reduced sugarcane yields and recovery rates compared with the year prior and recent history. Sugarcane yields in 2019/20 came in at 62.9 MT per hectare, which was 11.2 percent lower than the previous year's strong crop and 8.9 percent lower than the 5-year average. Final recovery rates for the 2019/20 harvest season were 10.71 percent, which was the lowest since 1994/95. The relatively low final figures are the result of severe drought conditions during the summer growing season, followed by periods of wet conditions during the normally dry harvest season.

**Figure 6**  
Mexico sugarcane, area harvested and yield, 2000/01-2019/20



Source: Conadesuca.

**Table 4: Mexico sugar supply and use 2018/19 - 2019/20 and projected 2020/21, August 2020**

Items	2018/19	2019/20 (estimate)	2020/21 (forecast)
	1,000 metric tons, actual weight		
Beginning stocks	1,395	1,169	807
Production	6,426	5,278	6,000
Imports	85	91	89
Imports for consumption	22	26	24
Imports for sugar-containing product exports, IMMEX 1/, other	63	65	65
Total supply	7,905	6,538	6,896
Disappearance			
Human consumption	4,092	4,153	4,073
For sugar-containing product exports (IMMEX)	460	345	395
Other deliveries and end-of-year statistical adjustment	-20	0	0
Total	4,532	4,498	4,468
Exports	2,204	1,233	1,497
Exports to the United States & Puerto Rico	856	1,194	923
Exports to other countries	1,348	39	574
Total use	6,737	5,731	5,965
Ending stocks	1,169	807	931
	1,000 metric tons, raw value		
Beginning stocks	1,478	1,239	856
Production	6,811	5,595	6,360
Imports	90	96	94
Imports for consumption	23	28	25
Imports for sugar-containing product exports (IMMEX)	67	69	69
Total supply	8,380	6,930	7,310
Disappearance			
Human consumption	4,337	4,402	4,317
For sugar-containing product exports (IMMEX)	488	366	419
Other deliveries and end-of-year statistical adjustment	-21	0	0
Total	4,804	4,768	4,736
Exports	2,337	1,307	1,587
Exports to the United States & Puerto Rico	908	1,265	979
Exports to other countries	1,429	41	608
Total use	7,141	6,075	6,323
Ending stocks	1,239	856	987
Stocks-to-human consumption (percent)	28.6	19.4	22.9
Stocks-to-use (percent)	17.3	14.1	15.6
High-fructose corn syrup (HFCS) consumption (dry weight)	1,528	1,493	1,470

1/ IMMEX = Industria Manufacturera, Maquiladora y de Servicios de Exportación.

Source: USDA, *World Agricultural Outlook Board*; USDA, Economic Research Service; Conadesuca.

Production for 2020/21 is projected to be 6.000 million MT, a 100,000-MT decrease from the previous month, as dry conditions in some sugarcane-producing regions may have an impact on the potential of the upcoming crop. Although reduced, the current 2020/21 projection is still more in line with historical averages.

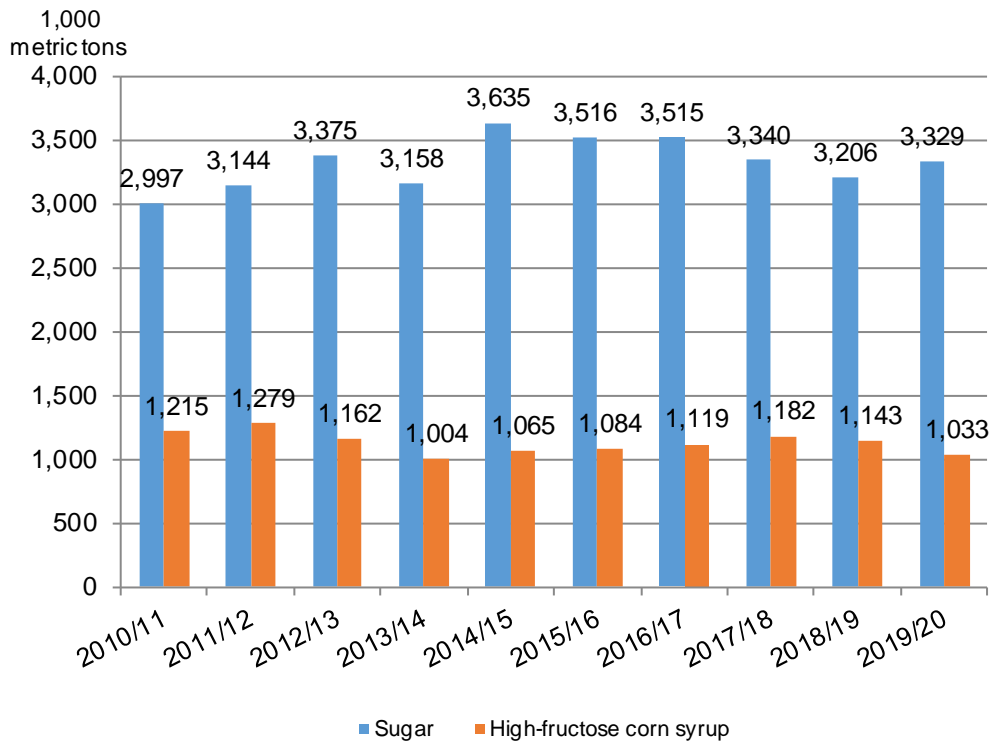
Total supplies for 2019/20 are estimated at 6.538 million MT, a 2,000-MT reduction from the previous month. The reduction is due to lower production being slightly offset by a 2,000-MT increase in imports for domestic consumption. Supplies in 2020/21 are projected to total 6.896 million MT, a 222,000-MT decrease from the previous month. The reduction is due to lower expected production, as well as lower beginning stocks caused by changes to Mexico's use outlook for 2019/20.

## Use Forecasts Increase Based on Strong Pace Through June

Total sugar use in Mexico is estimated at 5.731 million MT, a 120,000-MT increase from the previous month's figure. The increase is due to higher expected domestic use. Exports for 2019/20 are estimated at 1.233 million MT, including 1.194 million MT shipped to the United States—both unchanged from July.

Domestic deliveries for human consumption are estimated at 4.153 million MT, a 76,000-STRV increase from the July report and representing a 1.5-percent increase from 2018/19 totals. Through June, Mexico deliveries are 3.9 percent higher than the same period in 2018/19. The increase is also in line with reporting from the Foreign Agricultural Service's Mexico City Post. One factor contributing to the growth in sugar deliveries is the 9.6-percent year-over-year decline in high-fructose corn syrup (HFCS). Combined deliveries of sugar and HFCS are up a slight 0.3 percent through the first three quarters of the fiscal year.

Figure 7  
**Mexican sweetener consumption October to June, 2010/11 to 2019/20**



Source: Conadesuca.

Domestic deliveries for 2019/20 are projected to be 4.073 million MT, unchanged from the previous month. If realized, this would represent a 0.7-percent drop from the current 2019/20 estimate. Sweetener demand in Mexico is expected to be affected by public messaging and labelling campaigns targeting excessive sugar consumption and obesity. Deliveries of HFCS are projected to decline 1.6 percent from the current 2019/20 estimates as well.

Deliveries to the IMMEX program are estimated at 345,000 MT, a 44,000-MT increase from the previous month, with 65,000 MT expected to be from imported sugar and the remainder coming from domestic production. The total amount of expected sugar delivered to IMMEX is still lower than recent historical levels, however. The IMMEX program allows sugar to be marketed at levels lower than domestic prices for sugar-containing products that are exported. Given the relatively tight supplies for Mexico's domestic market and U.S. exports, the current 2019/20 estimate is 25.0 percent lower than the previous year, which had more sugar available in the domestic sugar market. Through August 9, 264,000 MT of domestically produced sugar had been shipped through the IMMEX program.

IMMEX deliveries for 2020/21 are projected to total 395,000 MT, a 10,000-MT increase from the previous month and more in line with historical levels. This is expected because of the improved production and supply outlook for Mexico in the next fiscal year.

## Ending Stocks for 2019/20 Suggest Tight Domestic Market

Mexico's ending stocks are estimated to be 807,000 MT in the July WASDE. This is a 122,000-MT decrease from the previous month due to the small reduction in supplies and increase in use. This would put Mexico's market below the 2½-month consumption target that domestic authorities use to monitor and manage domestic programs. While lower than the target and the past several years—which were markets with ample supplies—the current estimate is still in line with historical levels. If realized, this would be the smallest stocks-to-consumption ratio since 2014/15.

## Suggested Citation

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