



Wheat Outlook: July 2023

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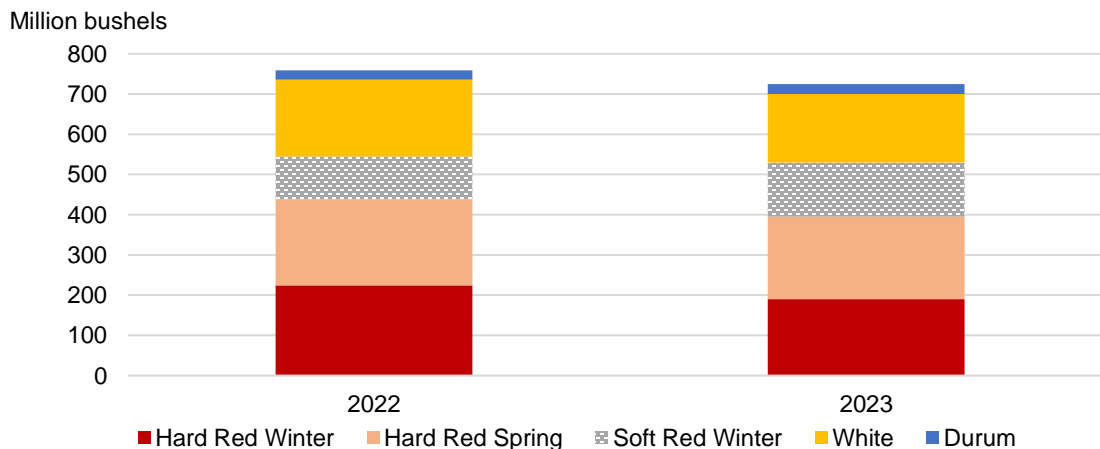
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U.S. By-Class 2023/24 Balance Sheets Released

The first by-class 2023/24 balance sheets were released in the July 2023 *World Agricultural Supply and Demand Estimates* report. U.S. all-wheat exports, projected at 725 million bushels, are down 4 percent from the previous year and would be the lowest since 1971/72. Exports for Hard Red Winter (HRW) are projected down 34 million bushels from the previous year to 190 million as a result of smaller supplies from drought affecting major production regions in 2 consecutive years. Exports of HRW are forecast at the lowest level since by-class supply and utilization records began in 1973/74. HRW exports are priced uncompetitively with other key global suppliers. Hard Red Spring (205 million bushels) and White exports (170 million bushels) are also projected down from the previous year, but to a lesser extent as supplies of these classes are relatively closer to last year’s levels. Conversely, Soft Red Winter exports are projected up 28 million bushels to 135 million on the basis of plentiful exportable supplies. Durum exports are forecast marginally higher year to year.

Figure 1
U.S. by-class wheat exports, 2022 and 2023



Source: USDA, National Agricultural Statistics Service; USDA, World Agricultural Outlook Board.

Domestic Changes at a Glance:

- U.S. wheat production for the 2023/24 marketing year is forecast at 1,739 million bushels, up 74 million from the June estimate and 5 percent above the previous year (table 1). USDA, National Agricultural Statistics Service (NASS) provided the first survey-based production estimates for Durum and Other Spring wheat, along with updated Winter Wheat production statistics.
- USDA, NASS provided its updated survey-based production forecast for the 2023/24 U.S. winter wheat crop in the July 12 *Crop Production* report, estimated at 1,206 million bushels. Average winter wheat yield is at 46.9 bushels per acre, up 2.0 bushels from the June forecast, but still down from 47.0 last year. Winter wheat area harvested is raised 0.4 million acres from the previous month to 25.7 million acres largely on increased area in Oklahoma. U.S. winter wheat area harvested is up 10 percent from last year.
- Hard Red Winter (HRW) production in the new marketing year is estimated by USDA, NASS at 577 million bushels, up 52 million from the June estimate. HRW production is up 9 percent from the previous year but remains historically low. Persistent drought has resulted in both lower yields and higher abandonment this season compared to average.
- Soft Red Winter (SRW) production for 2023/24 is estimated at 422 million bushels, up 20 million from the June estimate and 25 percent above the previous year on higher area and yield. SRW yield is estimated at 71.0 bushels per acre, up from 70.2 last year and the recent 5-year average of 67.1.
- White Wheat production is forecast at 245 million bushels, down 28 million bushels from the previous year on lower yields. Soft White Winter wheat, which is primarily grown in the Pacific Northwest and represents the bulk of this category, is estimated down from last year as growing conditions have been somewhat drier. However, Hard White Winter, Hard White Spring, and Soft White Spring are all projected up slightly year to year.
- Durum production is estimated at 54 million bushels, down 10 million from last year on lower harvested area and yield.
- Hard Red Spring production is estimated at 441 million bushels, down 1 percent from the previous year with lower yields more than offsetting higher area harvested.
- 2022/23 all-wheat exports are finalized at 759 million bushels, down 16 million from the previous month due to the combined effect of smaller-than-expected exports in May and revisions to Census data for previous months. This is the lowest level of U.S. exports since 1971/72.

- All-wheat exports for the United States in 2023/24 are projected at 725 million bushels, lower than last year's 759 million bushels, on the basis of lower total supplies year to year. U.S. export prices also remain uncompetitive with other major suppliers. The first by-class U.S. export projections feature HRS as the largest class (205 million bushels) followed by HRW (190 million), White (170 million), SRW (135 million), and Durum (25 million). HRS, HRW, and White exports are projected lower from last year, while SRW and Durum are forecast larger.
- U.S. wheat imports for 2022/23 are finalized at 122 million bushels, down 3 million from the previous month, but up from 96 million in 2021/22.
- U.S. wheat imports for 2023/24 are lowered 5 million bushels to 130 million with larger projected domestic supplies. The first by-class import projections are made with HRS as the leading class (55 million bushels), followed by Durum (50 million), HRW (15 million), SRW (5 million), and White (5 million). By-class projections for imports mostly resemble last year's proportions, but with larger HRW imports based on increased trade from the European Union.
- The 2022/23 season-average farm price is finalized at a record \$8.83 per bushel, down \$0.02 from the previous month.
- The 2023/24 season-average farm price is revised down \$0.20 per bushel to \$7.50 on larger-than-expected production and pressure from abundant global competition.

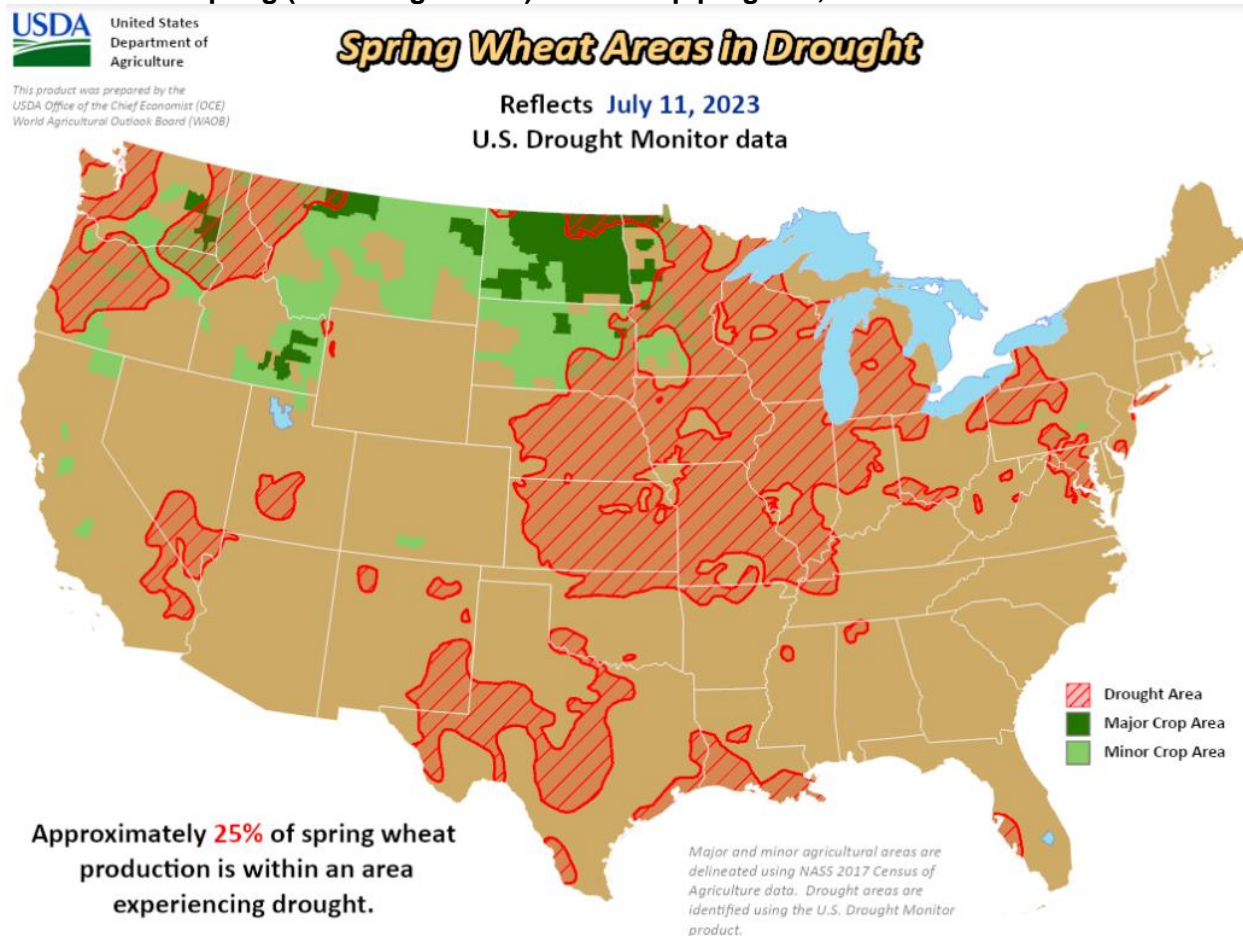
Table 1**U.S. wheat supply and use at a glance 2022/23 and 2023/24 (in million bushels)**

Balance sheet item	2022/23 July	2023/24 June	2023/24 July	Month-to-month change	Comments
Supply, total					June-May marketing year
Beginning stocks	698	598	580	-18	Revised stock figures in USDA, National Agricultural Statistics Service (NASS) <i>Grain Stocks</i> report
Production	1,650	1,665	1,739	+74	Updated production data from USDA, NASS, including the first survey-based complete by-class production data
Imports	122	135	130	-5	Reduced need to import in light of larger supplies
Supply, total	2,470	2,399	2,449	+50	
Demand					
Food	975	977	977	0	
Seed	70	65	65	0	
Feed and residual	86	70	90	+20	Larger expected crop along with expanded feed and residual for the backyear
Domestic, total	1,131	1,112	1,132	+20	
Exports	759	725	725	0	
Use, total	1,890	1,837	1,857	+20	
Ending stocks	580	562	592	+30	Stocks up slightly year to year, but still second-lowest since 2013/14
Season-average farm price	\$8.83	\$7.70	\$7.50	-\$0.20	Larger domestic supplies and pressure from international competition
Source: USDA, Economic Research Service calculations and USDA, World Agricultural Outlook Board, <i>World Agricultural Supply and Demand Estimates</i> .					

Dry Conditions Affecting Some Spring Wheat Areas

The 2023/24 marketing year started similar to 2022/23 with delayed planting in the Northern Plains as a result of wet conditions. This year, however, conditions dried out and the pace of planting progressed rapidly, reaching completion around mid-June. As of July 9, 72 percent of the spring wheat crop was headed, up from 41 percent last year and the 5-year average of 67 percent. Dry conditions are a concern in some areas, with 25 percent of spring wheat production areas reported to be in drought conditions as of July 11, 2023 (figure 2). This is up from just 17 percent at the same time last year and well above the season-low observed on June 13 this year (4 percent). Reported yields for both Durum and Other Spring wheat are both down year over year in the USDA, NASS *Crop Production* report.

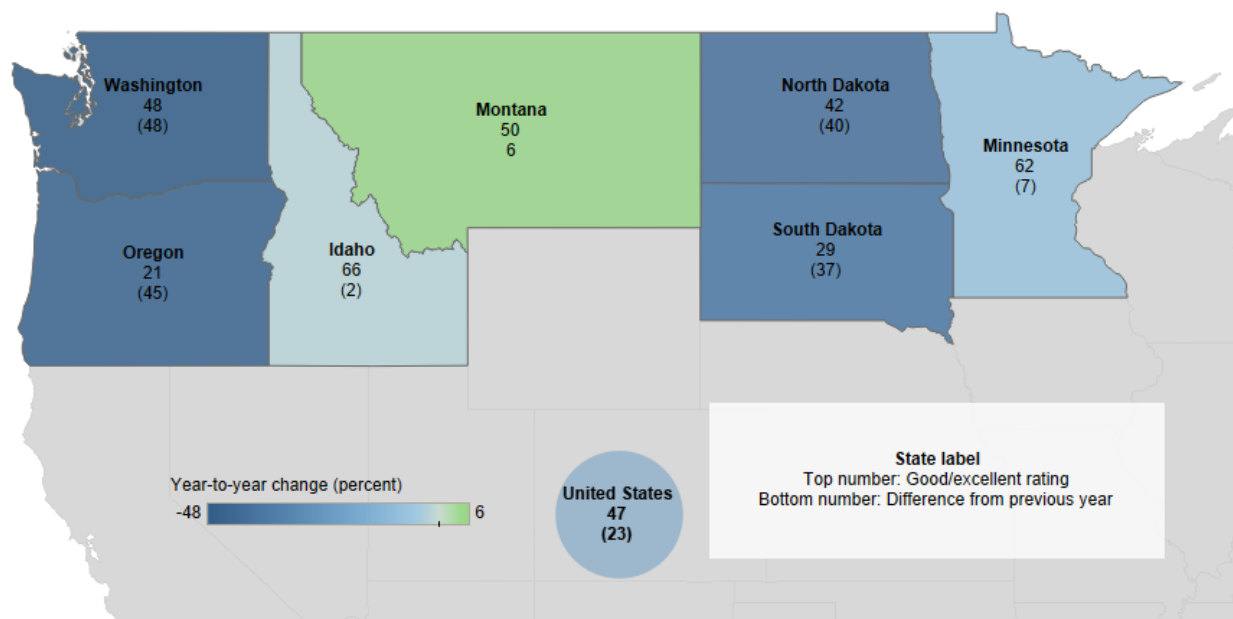
Figure 2
United States spring (excluding Durum) wheat crop progress, 2023



Note: This product was prepared by the USDA, Office of the Chief Economist (OCE), World Agricultural Outlook Board (WAOB). Major and minor agricultural areas are delineated using National Agricultural Statistics Service (NASS) 2017 Census of Agriculture data. Drought areas are identified using the U.S. Drought Monitor product.
Source: USDA, World Agricultural Outlook Board, Agricultural Weather and Assessments Group.

The USDA, NASS *Crop Progress* report indicates that spring wheat conditions are worse than last year across most major producing States (figure 3). Overall 47 percent of spring wheat production across the major States is reported to be in good/excellent condition as of July 9, down from 70 percent last year. The largest declines in crop conditions are for Washington and Oregon, but in terms of production volume, North Dakota has the most impactful decline in conditions. Conditions are up slightly from last year in Montana, the second-largest spring wheat producing State.

Figure 3
Spring wheat conditions as of July 9, 2023, and comparison to last year



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

First By-Class 2022/23 Balance Sheets Published

The July *WASDE* report presented the first by-class 2023/24 supply and use projections for U.S. wheat. U.S. HRW is forecast to have tight supplies as drought conditions affect the crop for the second consecutive year (table 2). Production is forecast 9 percent higher than last year based on higher area and yields, but still would be the second smallest HRW crop since 1963/64. Total supplies are forecast even lower than last year based on smaller beginning stocks. Imports are forecast higher, in part due to relative prices that support expansion of some U.S. mills' wheat sourcing from the European Union. Food use for HRW is projected down to the lowest level since 2010/11 as mills are expected to incorporate more HRS and SRW into mill grinds to reduce costs. With HRW supplies tighter this year and prices less competitive with corn, feed and residual use of this class is anticipated to be smaller. Exports are projected down to the

lowest level on record (the data series dates back to 1973/74) based on limited supplies, uncompetitive pricing, and the slow pace of export sales. Ending stocks are projected at the lowest level in 16 years.

Table 2

U.S. Hard Red Winter wheat, supply and distribution

	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
Beginning stocks	589.3	580.9	515.8	506.4	427.8	375.7	232.1
Production	750.1	662.2	844.9	659.0	749.9	530.9	577.2
Imports	6.7	4.9	1.9	4.1	4.1	4.7	15.0
Supply, total	1,346.2	1,248.1	1,362.6	1,169.4	1,181.8	911.3	824.3
Food	391.6	383.5	378.2	376.8	410.6	373.0	365.0
Seed	25.6	25.3	24.0	26.3	25.8	29.2	27.0
Feed and residual	-25.5	-8.4	76.4	-1.5	54.2	52.9	15.0
Domestic, total	391.8	400.4	478.6	401.6	490.6	455.1	407.0
Exports	373.5	331.9	377.6	340.0	315.5	224.1	190.0
Use, total	765.2	732.3	856.3	741.6	806.1	679.2	597.0
Ending stocks	580.9	515.8	506.4	427.8	375.7	232.1	227.3
Stocks to use (percent)	75.9	70.4	59.1	57.7	46.6	34.2	38.1

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

HRS supplies are up slightly this year with larger beginning stocks more than offsetting a slightly smaller crop (table 3). A small increase in area is outweighed by slightly lower yields owing to dry conditions in some growing regions. Food use for HRS is expected larger based on increased substitution for HRW in mill grinds, while exports are lower based on the slow pace of export sales to date. Ending stocks are projected to tighten and would be the second lowest since 2011/12.

Table 3

U.S. Hard Red Spring wheat, supply and distribution

	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
Beginning stocks	235.0	191.0	263.0	280.0	235.0	146.0	158.0
Production	384.2	587.0	519.9	531.2	297.1	446.0	440.6
Imports	88.0	67.3	52.2	46.8	43.5	55.9	55.0
Supply, total	707.2	845.3	835.2	858.0	575.5	647.9	653.6
Food	254.0	255.0	265.0	263.0	245.0	269.0	276.0
Seed	18.0	16.6	18.4	16.8	11.8	17.2	18.0
Feed and residual	15.0	51.9	2.7	57.6	-34.8	-10.2	0.0
Domestic, total	286.9	323.5	286.0	337.5	222.0	276.0	294.0
Exports	229.3	258.8	269.1	285.5	207.5	213.9	205.0
Use, total	516.2	582.3	555.2	623.0	429.5	489.9	499.0
Ending stocks	191.0	263.0	280.0	235.0	146.0	158.0	154.6
Stocks to use (percent)	37.0	45.2	50.4	37.7	34.0	32.3	31.0

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

U.S. SRW production is projected to be the largest in 9 years based on a 24-percent increase in area harvested and the second-highest yields on record (table 4). Domestic use is forecast higher with SRW competitively priced to replace some HRW in mill grinds as well as in feed rations. Exports are forecast at 135 million bushels, the largest in 10 years. Ending stocks are forecast to reach the highest level in 5 years.

Table 4

U.S. Soft Red Winter wheat, supply and distribution

	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
Beginning stocks	215.0	205.0	158.0	105.0	85.0	99.0	90.0
Production	293.2	285.6	239.8	266.2	360.7	336.5	422.3
Imports	4.3	4.6	3.5	4.9	3.6	3.8	5.0
Supply, total	512.5	495.2	401.3	376.1	449.3	439.4	517.3
Food	154.0	151.0	148.0	148.0	154.0	163.0	166.0
Seed	11.6	10.6	10.7	12.7	12.5	14.8	12.0
Feed and residual	50.8	47.6	45.2	61.1	72.3	64.5	75.0
Domestic, total	216.4	209.2	203.9	221.8	238.8	242.3	253.0
Exports	91.1	128.0	92.4	69.4	111.5	107.1	135.0
Use, total	307.5	337.2	296.3	291.1	350.3	349.4	388.0
Ending stocks	205.0	158.0	105.0	85.0	99.0	90.0	129.3
Stocks to use (percent)	66.7	46.9	35.4	29.2	28.3	25.8	33.3

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

White wheat production is forecast down 10 percent from last year on lower yields (table 5). Dry conditions reduced Soft White wheat production in the Pacific Northwest, but drought has been substantially less than 2 years ago. Exports, mainly to markets in Asia, are projected 20 million bushels lower at 170 million with smaller supplies.

Table 5

U.S. White wheat, supply and distribution

	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
Beginning stocks	105.0	87.0	88.0	95.0	70.0	54.0	72.0
Production	258.6	272.4	273.4	302.5	201.0	272.4	244.9
Imports	7.5	5.7	5.5	7.0	5.4	6.6	5.0
Supply, total	371.1	365.1	367.0	404.5	276.4	333.0	321.9
Food	85.0	85.0	85.0	85.0	83.0	85.0	85.0
Seed	5.3	5.2	5.6	5.7	5.5	6.0	6.0
Feed and residual	-0.7	-9.7	-6.6	-26.7	-13.0	-20.5	0.0
Domestic, total	89.6	80.5	84.0	64.0	75.5	70.5	91.0
Exports	194.5	196.5	187.9	270.5	146.9	190.5	170.0
Use, total	284.1	277.1	272.0	334.5	222.4	261.0	261.0
Ending stocks	87.0	88.0	95.0	70.0	54.0	72.0	60.9
Stocks to use (percent)	30.6	31.8	34.9	20.9	24.3	27.6	23.3

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

Durum production is forecast at 54 million bushels, down 16 percent from last year. With supplies of this class still relatively tight, imports are projected at 50 million bushels, similar to last year. Exports are projected slightly higher than last year at 25 million bushels with the United States remaining a net importer of this class. Domestic food use is forecast at 85 million bushels, equal to the strong consumption level estimated in 2022/23.

Table 6

U.S. Durum wheat, supply and distribution

	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
Beginning stocks	36.3	34.9	55.0	41.9	27.3	23.7	28.0
Production	54.8	78.0	54.0	69.1	37.6	64.0	54.0
Imports	51.4	52.0	40.7	37.4	39.6	51.0	50.0
Supply, total	142.5	164.9	149.7	148.4	104.5	138.7	132.1
Food	79.5	79.9	85.4	87.7	78.9	85.0	85.0
Seed	3.0	1.8	2.8	2.3	2.1	2.8	2.0
Feed and residual	7.5	6.4	-22.5	2.6	-14.5	-0.3	0.0
Domestic, total	89.9	88.1	65.7	92.6	66.5	87.5	87.0
Exports	17.7	21.8	42.0	28.5	14.4	23.1	25.0
Use, total	107.6	110.0	107.7	121.1	80.8	110.7	112.0
Ending stocks	34.9	55.0	41.9	27.3	23.7	28.0	20.1
Stocks to use (percent)	32.5	50.0	38.9	22.6	29.4	25.3	17.9

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

Census Revisions Incorporated into USDA Data

The July 2023 *WASDE* report incorporates the latest revisions by the Department of Commerce, Bureau of the Census, which pertain to calendar years 2020–22. The trade figures cited in this report and the *Wheat Data* product published July 13, 2023, also match these revised statistics. The *Historical By-Class Quarterly* data file and the *Wheat Data Visualization* were updated to address these revisions. The 4th quarter data have not been incorporated into these files as the food use is not yet finalized for the 2022/23 marketing year. The August 1 USDA, NASS *Flour Milling Products* report will provide the input necessary to finalize the marketing year data.

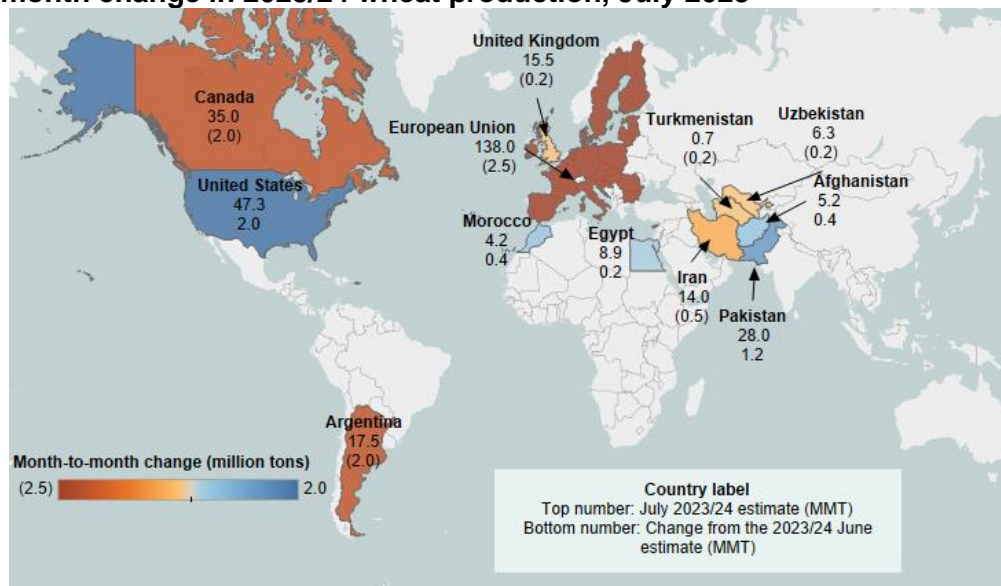
International Outlook

2023/24 International Overview

- The 2023/24 global wheat production is forecast at a 796.7 million metric tons (MMT), down 3.5 MMT from the June forecast with smaller crops for **Argentina, Canada, the European Union (EU), and Iran**. These are partially offset with upward revisions for the **United States, Pakistan, Afghanistan, and Morocco** (figure 4).
 - Argentina production is forecast down 2.0 MMT to 17.5 MMT with lower harvested area (-0.7 million hectares to 5.8 million).
 - Production in Canada is lowered 2.0 MMT to 35.0 MMT as yields are projected down 0.19 metric tons per hectare to 3.30 as the Alberta province is exhibiting below-average conditions due to drought conditions in some areas.
 - EU production is cut with smaller crops in **Spain** (-0.4 MMT to 5.0 MMT), **Germany** (-0.6 MMT to 22.3 MMT), **France** (-0.4 MMT to 37.2 MMT), and **Italy** (-0.3 MMT to 7.7 MMT).
 - Afghanistan production is revised up based on a higher area harvested (+0.2 million hectares to 2.4 million) due to an acreage switch from poppies.
 - Production in Pakistan is forecast at a record 28.0 MMT based on a record yield (3.16 metric tons per hectare) and a harvested area of 8.9 million hectares.

Figure 4

Month-to-month change in 2023/24 wheat production, July 2023



Note: MMT=million metric tons; Changes less than 200,000 metric tons are not included.
Source: USDA, Economic Research Service calculations using data from the USDA, Foreign Agricultural Service, *Production, Supply and Distribution* database.

- 2023/24 global wheat consumption is up 2.7 MMT to 795.8 MMT driven largely by higher feed and residual use. To match the statistics presented in the *World Agricultural Supply and Demand Estimates (WASDE)* report, adjusted consumption is calculated based on the differences between exports and imports based on local marketing years (MY). This difference, or the unaccounted trade, is raised 0.6 MMT to 3.7 MMT for 2023/24 as MY imports are lowered more than MY exports. Total consumption plus unaccounted trade results in an adjusted consumption of 799.5 MMT, up 3.3 MMT from the June estimate.
- Feed and residual use is up 2.3 MMT to 157.1 MMT and food, seed, and industrial (FSI) use is also up 0.4 MMT to 638.7 MMT. Feed and residual use is up for **China** (+2.0 MMT to 36.0 MMT) as late harvest rains in the Henan province is expected to yield a higher proportion of feed-quality wheat. This is partially offset with lower feed use in **Canada** (-0.5 MMT to 4.0 MMT) due to smaller domestic supplies.
- Global wheat trade in 2023/24 is forecast lower at 214.4 MMT. Trade year (July/June) exports are forecasted lower on fewer exportable supplies in **Argentina** and **Canada**. **Russia** and **Australia** partially offset these revisions.
 - Russia’s exports are projected to grow to a record 47.5 MMT as a record crop last year resulted in plentiful supplies in 2023/24. Russia also revised the method for calculating its floating export tax in June 2023 by raising the base price to 17,000 rubles resulting in a lower tax allowing Russia to be more competitive on the global market. In the first two weeks of July the tax was at 29 dollars per metric ton, the lowest since June 2021 (figure 5).

Figure 5

Floating wheat export tax in Russia, June 2021–July 2023

Tax (dollars per metric ton)



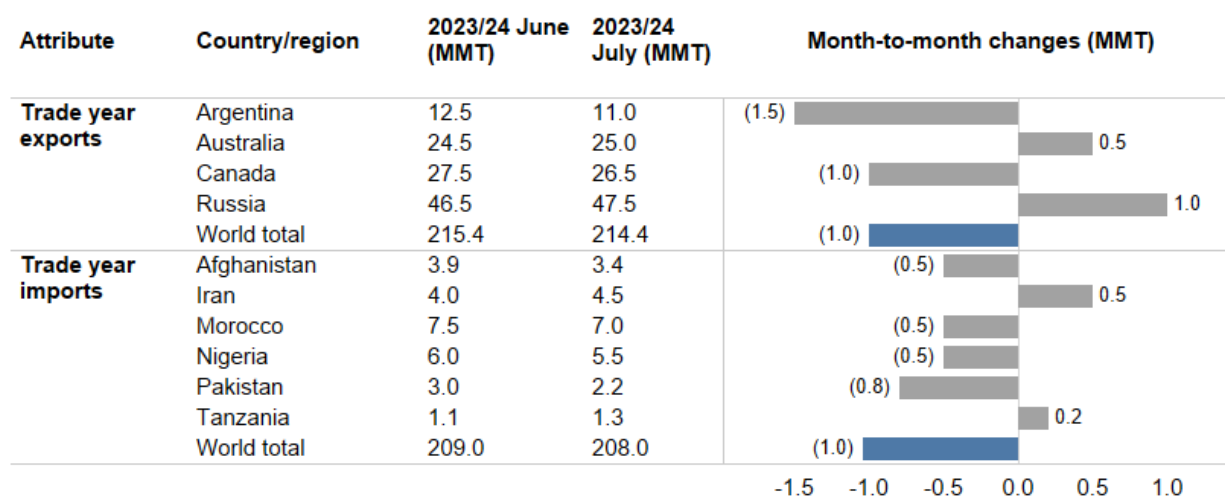
Note: In July 2022, Russia switched to using Russian rubles to calculate the tax; then in June 2023 increase the base rate. After July 2022, the tax shown here is converted from rubles to dollars using the exchange rate on the announcement date.

Source: USDA, Economic Research Service calculations using data from the Ministry of Agriculture of the Russian Federation.

- Trade year (TY) imports are lowered 1.0 MMT to 208.0 MMT as **Pakistan** (-0.8 MMT to 2.2), **Afghanistan** (-0.5 MMT to 3.4), and **Morocco** (-0.5 MMT to 7.0) are projected to have more domestic supplies (figure 6). These are partially offset by an upward revision for **Iran** (+0.5 MMT to 4.5).

Figure 6

Month-to-month change in 2023/24 wheat trade, July 2023



Notes: MMT = million metric tons; changes less than 100,000 metric tons are not included; month-to-month change is the difference between July 2023 and June 2023 estimates.

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

- Ending stocks are lowered 4.2 MMT to 266.5 MMT largely driven by higher feed use in **China** lowering ending stocks by 2.6 MMT to 137.1 MMT. Major exporters ending stocks are lowered 4.5 MMT to 54.7 MMT as record exports lower **Russia's** ending stocks to 12.4 MMT (-2.0 MMT from June).
 - Lower domestic production tightens stocks in the **EU** (-1.5 MMT to 14.7 MMT), **Argentina** (-0.5 MMT to 1.8 MMT), and **Canada** (-0.5 MMT to 2.5 MMT). Larger exports in **Australia** results in tighter stocks (-0.5 MMT to 2.8 MMT). A boost in exports in 2022/23 led to smaller stocks in **Ukraine** (-0.1 MMT to 1.6 MMT). The **United States** is revised up by 0.8 MMT to 16.1 MMT with a larger crop. **Kazakhstan** is revised lower 0.2 MMT to 2.7 MMT.
 - Production in **Egypt** was revised back to 2000/01 based on updated government area harvested statistics, boosting ending stocks in 2023/24 (+1.6 MMT to 4.5 MMT).
 - Record production in **Pakistan** (28.0 MMT) provides support to its ending stocks (+0.8 MMT to 4.2 MMT).

Overview of the 2022/23 Global Wheat Market Changes

- 2022/23 global production raised 1.7 MMT to 790.2 MMT. Based on updated government statistics, **Australia** is revised up 0.7 MMT to 39.7 MMT as yields were better than anticipated. **Ukraine** is revised up 0.6 MMT to 21.5 MMT as area harvested increased by 0.3 million hectares to 5.6 million hectares, based on government data.
- Consumption in 2022/23 is raised 0.7 MMT to 786.8 MMT. Feed and residual use is forecast up 0.3 MMT to 156.4 largely driven by the **United States** (+0.9 MMT to 30.8) only partially offset by lower feed use in **Australia** (-0.5 MMT to 4.5). While Australia had a larger proportion of feed quality wheat in 2022/23, it continued to be able to export to other countries, most notably China for use in feeding. Global food, seed, and industrial (FSI) use is raised 0.3 MMT to 630.4 MMT.
- 2022/23 TY imports are forecast up 0.7 MMT to 209.6 MMT driven by increase for **Turkey** (+1.0 MMT to 12.0 MMT) and the **EU** (+0.5 MMT to 12.0 MMT) boosting them to the second- and third-largest wheat importers in 2022/23 behind China (13.5 MMT).
- 2022/23 TY exports remain at 213.6 MMT as **Russia** is forecast up 1.0 MMT to 45.5 MMT and **Ukraine** is up 0.8 MMT to 16.8 MMT. These are offset with reductions for **Canada** (-0.5 MMT to 25.5 MMT), **EU** (-0.5 MMT to 34.0 MMT), **Kazakhstan** (-0.5 MMT to 9.5 MMT), and the **United States** (-0.5 MMT to 21.0 MMT).

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