



Wheat Outlook

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U.S. Export Prospects Improved on Reduced Price Outlook and Competitor Production Cuts

The 2020/21 forecast for U.S. all-wheat exports is raised 25 million bushels this month concurrent with a 10-cent cut in the season-average farm price (SAFP) and lower production outlooks for several key competitors, including the European Union, Argentina, and Kazakhstan (fig. 1). Improved U.S. price competitiveness in global markets is attributable to a sharp decline in the U.S. corn SAFP, lowered 25 cents this month, and to increased exportable supplies following an increase in 2020/21 wheat production, raised 14 million bushels this month to 1,838 million.

Figure 1
U.S. wheat export competitiveness tends to improve as the all-wheat SAFP falls



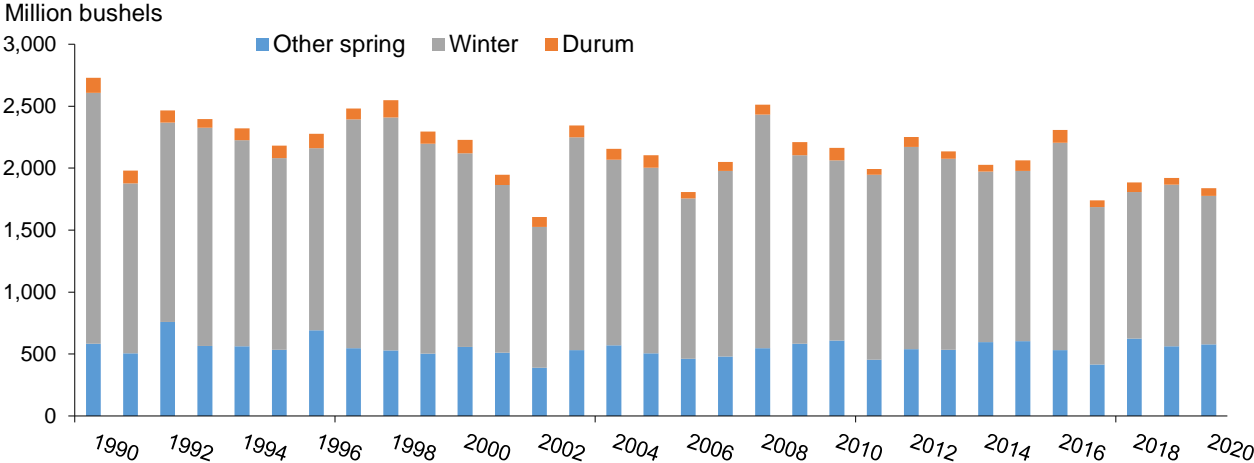
Note: SAFP=season average farm price.
 Source: USDA, World Agricultural Supply and Demand Estimates.

Domestic Outlook

Domestic Changes at a Glance:

- Based on the USDA-National Agricultural Statistics Service (NASS) August *Crop Production* report, U.S. production of all wheat in 2020 is raised 14 million bushels from the July forecast to 1,838 million bushels (fig. 2).
 - If the current forecast is realized, the 2020/21 harvest will be the smallest since 2017/18 and down 4 percent from last year. The all-wheat yield is raised 0.4 bushels per acre this month to an average of 50.1 bushels.
 - The September 30 *Small Grains Summary* will contain the next update of 2020/21 wheat production by class.
- The USDA, NASS *Flour Milling Products* report, released on August 3, indicated significantly reduced wheat food use in the final 2 months of the 2019/20 marketing year, relative to the period immediately following widespread stay-at-home orders because of COVID-19.
 - In contrast, during the same period, durum food use for the 2019/20 surged to nearly 86 million bushels.
- Carryout for the 2020/21 marketing year is trimmed 17 million bushels this month to just over 925 million bushels and is the lowest level since 2014/15 when ending stocks totaled 752.4 million.
- The season average farm price (SAFP) for 2020/21 wheat is lowered 10 cents per bushel to \$4.50, partially on a 25-cent drop in the corn SAFP.

Figure 2
Increased other spring and durum production offsets reduced winter wheat prospects for 2020/21



Source: USDA, National Agricultural Statistics Service data.

Table 1 - U.S. wheat supply and use at a glance 2019/20 and 2020/21

Balance sheet item	2019/20 August	2020/21 July	2020/21 August	2020/21 Change from previous month	Comments
Supply, total					<i>May-June Marketing Year (MY)</i>
Beginning stocks	1,080	1,044	1,044	0	
Production	1,920	1,824	1,838	14	All-wheat for the 2020/21 marketing year is increased on net based on a 2 percent reduction in the winter wheat harvest that is more than offset by gains for durum and other spring output, raised 11 percent and 5 percent, respectively, from the previous forecast.
Imports	105	140	130	-10	Increased domestic production of other spring wheat is expected to reduce demand for hard red spring wheat imports of this class.
Supply, total	3,105	3,007	3,011	3	Total supplies are increased modestly and remain at lowest level since 2015/16.
Demand					
Food	962	964	960	-4	Wheat millings fell off significantly in the months following an initial surge in March that was caused by stocking up behavior. In the coming months, tepid demand for wheat flour is expected to persist as consumers continue to spend most of their food dollar at retail versus food service locations.
Seed	61	61	61	0	
Feed and residual	73	90	90	0	
Domestic, total	1,096	1,115	1,111	-4	Domestic use is lowered slightly on reduced prospects for food use.
Exports	965	950	975	25	Production and export cuts for competitors are expected to create opportunities for U.S. wheat in the global marketplace.
Use, total	2,061	2,065	2,086	21	Total use is increased slightly this month and is the highest since the 2016/17 marketing year.
Ending stocks	1,044	942	925	-17	Carryout for the new marketing year is lowered on offsetting supply changes and increased use. The current projection is the lowest in 6 years.
Season Average Farm Price	\$4.58	\$4.60	\$4.50	-0.1	The all-wheat season average farm price is lowered 10 cents this month, despite a tighter balance sheet, because of the dampening effects of a sharp drop in the comparable corn price.

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

Winter Wheat Production Lowered on Yield Decline

Winter wheat production for the 2020/21 marketing year is lowered about 2 percent from the July forecast on a reduced outlook for yields. The winter wheat average yield is projected at 51.1 bushels per acre, down 0.9 bushels from the July 1 forecast. While record-high yields are forecast for Montana, Oklahoma, and South Dakota, these gains were offset by forecast yield declines in several other winter wheat-producing States. Most influentially, in Kansas—where approximately one-quarter of the 2020 crop was grown—month to-month average yields dropped by 2 bushels per acre to 46 bushels on persistent dryness. Yields in Colorado, which were already at 7-year low as of July 1, were further lowered to a scant 30 bushels per acre as of August 1 while that State deals with widespread drought. Winter wheat harvested area is unchanged this month and remains at 23.44 million acres. Based on updated yield projections released in the August USDA, NASS *Crop Production* report, winter wheat production for the 2020/21 marketing year is forecast at 1,198 million bushels, down from 1,304 million in 2019.

By class, hard red winter (HRW) wheat production was lowered 2 percent from the July 1 forecast to 695 million bushels, more than 137.8 million bushels below the 2019/20 HRW production estimate. Since 2007/08, HRW production has fallen below 700 million bushels only one other time in 2018/19, when dryness caused yields to drop to 39.1 bushels per acre. As of August 1, 2020, soft red winter (SRW) wheat production is forecast at 277 million bushels, a decline of 1 percent from the previous forecast.

2019/20	HRW	SRW	HWW	SWW
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
2020/21				
Planted area (million acres)	21.498	5.633	0.401	3.018
Harvested area (million acres)	15.959	4.265	0.348	2.867
Production (million bushels)	695.365	276.882	14.558	211.557

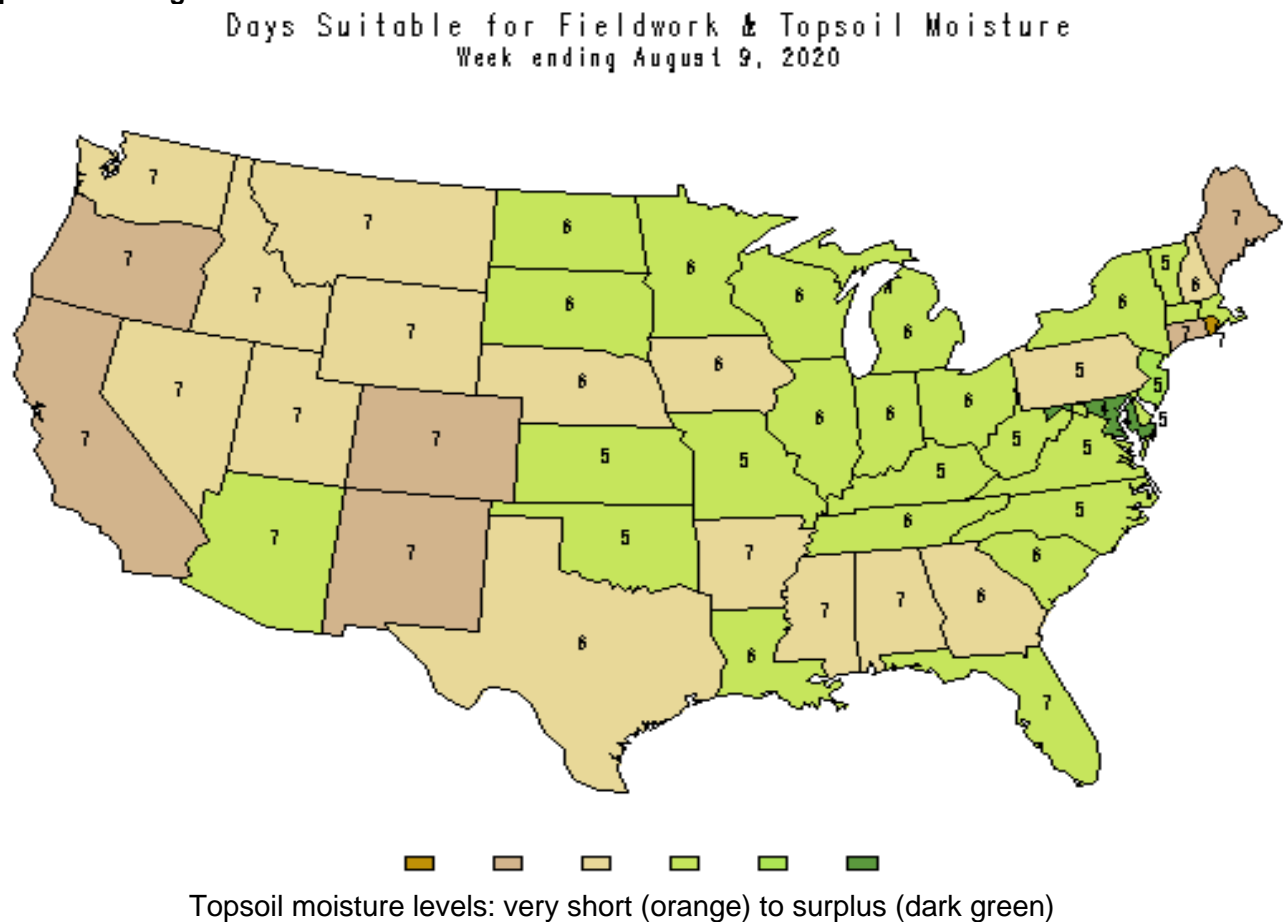
Note: HRW=hard red winter wheat; SRW=soft red winter wheat; HWW=hard white winter wheat; SWW=soft white winter.

Other Spring and Durum Wheat Yields Lifted on Timely Moisture

Other spring wheat and durum production is concentrated in the Northern Plains States where timely rains have recharged soil moisture and helped to lift yield and production forecasts. As of August 9, key other spring and durum wheat-growing States—North and South Dakota were

reported by NASS to be near surplus topsoil moisture levels (fig. 3). Based on conditions as of August 1, 2020, other spring wheat production is estimated at 577 million bushels, of which 530 million bushels are hard red spring (HRS) wheat. Yields for the other spring wheat crop are projected to be record high at 49.0 bushels per acre. As of August 9, 2020, roughly 15 percent of the 2020/21 harvest was complete, slightly behind the 5-year average pace of 25 percent. The September *Small Grains Annual* report will provide the next update for other spring and durum production.

Figure 3
After early spring dryness, top soil moisture is recharged in key Northern Plains spring wheat production region



Source: USDA, National Agricultural Statistics Service.

Durum production for the 2020/21 marketing year is estimated by NASS at 61.790 million bushels and up 11 percent from the previous forecast. Production gains are attributable to significant yield gains for Montana and North Dakota, where timely rains helped to lift yields per acre by 4.0 and 5.0 bushels per acre, respectively, from the previous projection. The all-durum wheat yield forecast is 42.8 bushels per acre, a 4.3 bushel per acre increase for the July forecast, but down nearly 3 bushels from 2019.

2019/20	HRS	HWS	SWS	Durum
Planted area (million acres)	12.012	0.143	0.505	1.339
Harvested area (million acres)	11.027	0.138	0.495	1.175
Production (million bushels)	521.557	11.831	28.992	53.557
2020/21				
Planted area (million acres)	11.502	0.164	0.534	1.500
Harvested area (million acres)	11.117	0.158	0.520	1.444
Production (million bushels)	529.683	12.750	35.052	47.802

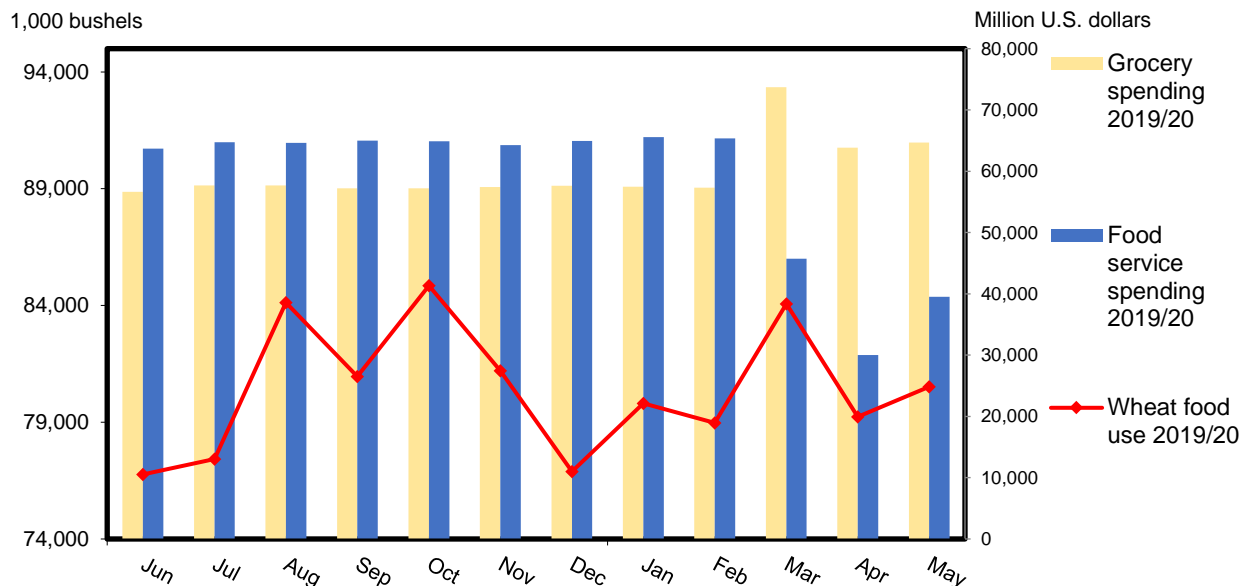
Note: HRS=hard red spring wheat; HWS=hard white spring wheat; SWS=soft white spring wheat.

Wheat Food Use Revisions Reflect New Consumption Patterns

On August 3, 2020 USDA, NASS released the latest *Flour Milling Products* report, which contained evidence of emergent consumption patterns. The May 2020 edition of the report, which provided data through March 2020, revealed a surge in wheat food use as consumers stocked up on staples at the beginning of stay-at-home orders aimed to reduce the spread of COVID-19. In contrast, the latest version showed that after the initial spike, flour milling declined precipitously and largely corresponded with greatly reduced spending on food eaten away from home (fig. 4).

Figure 4

Consumer food spending patterns affect monthly wheat food use estimates



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

The NASS data indicate that food use in the second quarter of the calendar year had fallen off significantly (down 6 percent) from the first quarter. Wheat flour production totaled 219 million

bushels in April-June of 2020 versus 233 million in the first 3 months of 2020 and compared with 225 for the second calendar year quarter of 2019. The drop in quarterly food use reflects a sharp decline in use in April after a surge in March, which was then followed by a tepid increase as spending on food eaten away from home slowly increased. The drop in wheat food use had been expected by industry as was reflected in the last adjustment to the figure (please see the May *Wheat Outlook* for more details). At 961.8 million bushels, food use for the 2019/20 marketing year is down fractionally from the previous estimate of 962 million.

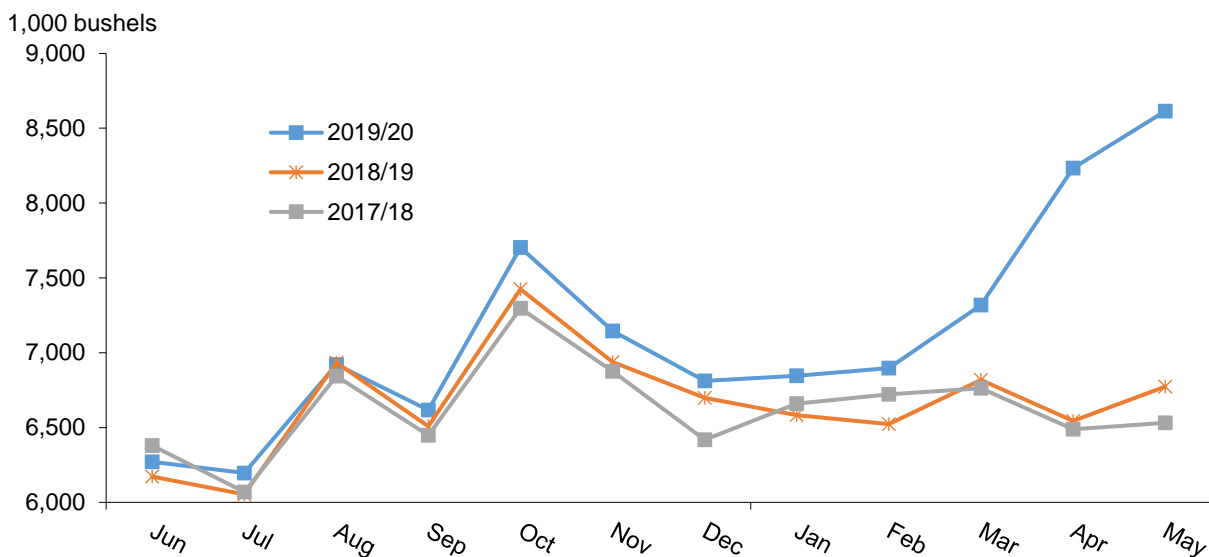
The food use estimate for June shows a continuation of the pattern of weak consumption in the new marketing year. At slightly more than 75.8 million bushels, June food use is about 1 million bushels below last year's estimate and nearly 2 million bushels below the 5-year average. Further, the weak June food use data reveals the continuation of the trend of weaker-than-normal food use that began in April. Based on the most recent data and expectations that spending on food service will remain below pre-COVID-19 levels for at least the first half of the marketing year, wheat food use in the out year is lowered 4 million bushels to 960 million. The next *Flour Milling Products* report is due out on November 2, 2020.

Unlike the monthly all-wheat food use estimates—which demonstrated a high degree of variability through the first six months of 2020—durum food use consistently strengthened through the last several months of the reporting period (fig. 5). Through the end of February 2020 and before the imposition of stay-at-home orders in March, durum food use was running about 1.5 million bushels above the 2018/19 use pace. As with all-wheat food use, durum food use surged in early March but unlike the all-wheat food use figure, durum use has remained far above the normal pace through the end of the most recent reporting period. At 85.6 million bushels, durum food use is record-high for the 2019/20 marketing year and 5.6 million above the 2018/19 estimate.

Durum wheat, and specifically the durum-derived semolina, are key ingredients in pasta products. Many pasta products are shelf-stable, inexpensive, and easy to prepare, making them an understandably popular food option during the current economic downturn and corresponding pandemic. Industry news sources such as *Food Business News* (FBN) and *Supply Chain Management Review* (SCMR) have documented the increase in U.S. pasta sales in recent months with FBN reporting that in the first month of stay-at-home orders, some manufacturers were shipping up to 30 percent more branded pasta products than for the same period a year before. SCMR recently reported that even when restaurants began to reopen towards the end of May, overall demand for spaghetti increased, leading to a resumption of empty shelves, or stockouts at supermarket stores that had first occurred in the early weeks of stay-at-home orders. SCMR further notes that shortages were reported throughout June as

home-based spaghetti consumption remained elevated even as food service spending and restaurant dining increased.

Figure 5
U.S. durum food use trended ahead of last year's pace before surging in late March 2020



Source: USDA, Economic Research Service calculations based on USDA National Agricultural Statistics Service data.

All-Wheat Exports for 2020/21 Lifted on U.S. Expanded Opportunities

While several competitors in global wheat markets had wheat production forecasts reduced this month, production and exportable supplies for the U.S. are raised month to month. Most notably, production for the European Union (EU) was lowered 4.0 million tons which supports a 1.5-million-ton reduction in projected exports. The EU is a key exporter of wheat to North Africa, a region that is poised to regain its status as the top wheat-importing region in the world in 2020/21. Increasing demand in this region, at a time when EU supplies are stretched, increases opportunities for U.S. wheat export sales. In addition, the expanded tariff rate quota for non-Mercosur (southern hemisphere common market) wheat in Brazil, is expected to support expanded U.S. wheat shipments, primarily for HRW wheat. U.S. wheat sales to China have also ticked up in recent months in accordance with the Phase One agreement between the two nations. Based on the pace of sales to date and emergent prospects in global markets, U.S. exports are raised 25 million bushels to 975 million this month. If realized, this would be the highest volume of wheat exports since 2016/17 when U.S. exports sales topped 1,050 million bushels and very competitive prices created a cost advantage for U.S. wheat.

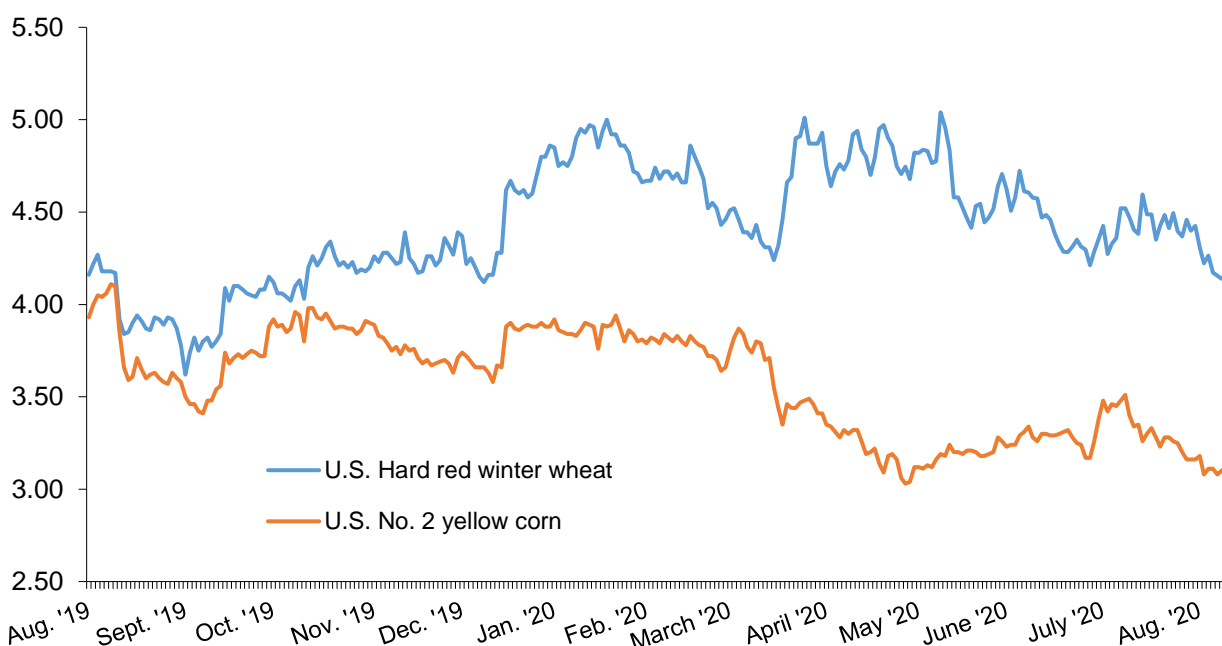
U.S. Wheat Price Slips on Falling Corn Price

After a late March/early April price rally, U.S. HRW wheat futures have been level to lower and moved in relation to corn futures (fig. 6). Cash wheat prices have followed a similar pattern with prices in most markets and across most classes declining between April and July—an indication of the strong influence of corn prices on wheat (please see the USDA, ERS *Wheat Data Product* for key market indicators). For example, in April the Kansas City (KC) cash price for 13 percent protein HRW averaged \$6.48 per bushel; in July, the average price had fallen to \$5.88 per bushel. Little domestic price support can be found in global wheat markets, where prices have trended lower in recent weeks and are reflection of still-record high global wheat stocks. Please see the USDA, FAS *Global Markets and Trade* circular for more information.

Figure 6

After diverging in late March, wheat and corn futures prices moving in a similar direction

U.S. dollars per bushel



Notes: HRW is hard red winter wheat (11.5% protein).
Source: Chicago Mercantile Exchange (CME)

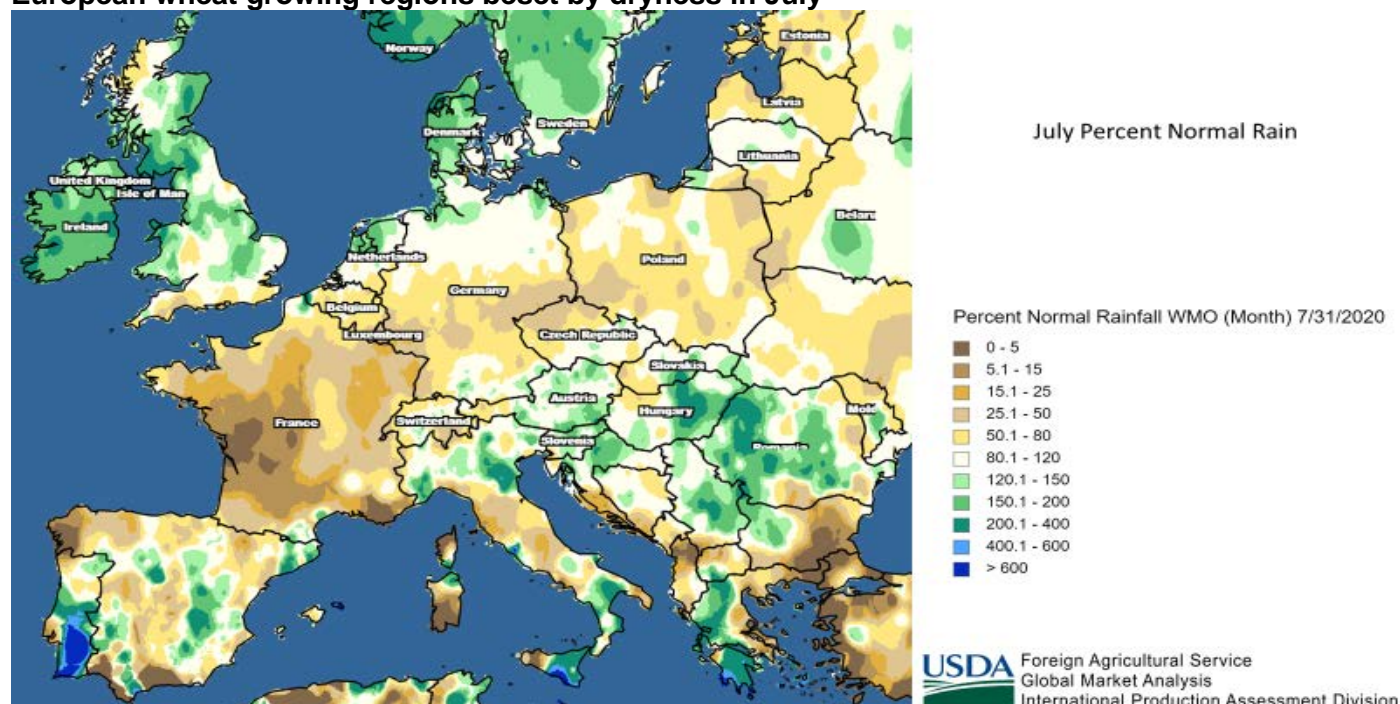
International Outlook

Updated Harvest Results Lead Way to Net Reduced Global Wheat Production

With harvest underway in several key wheat-producing countries, estimates of 2020/21 production have been refined and result in a net 3.3 million metric ton month-to-month reduction in the global outlook. The largest cut is for the **European Union and United Kingdom** (EU+UK), where a combination of official data and satellite analysis support a 4.0 million ton (3 percent) cut from the previous month's estimate. At 135.5 million tons, the EU+UK is nearly 20 million metric tons below last year's production estimate of 154.9 million and the lowest since 2012/13 when the harvest totaled just 133.9 million.

Figure 7

European wheat growing regions beset by dryness in July



Source: Bryan Purcell of the USDA, Foreign Agricultural Service, International Production Assessment Division.

An early August report from the French Agricultural Ministry supports a 2 million metric ton reduction to estimated French wheat production that is based on reduced wheat area planted, reflecting the effects of excessive soil moisture at harvest that inhibited some wheat plantings. Yield deterioration is cited by the German Statistics Office as the major factor in lowering the forecast for 2020/21 wheat production by 0.8 million metric tons. Germany has struggled with hot dry conditions during much of the wheat growing season; central portions of the country are dealing with short-term soil moisture deficits. Through July, key EU wheat producers—France

and Germany—received minimal showers resulting in rainfall totals well below normal (fig 7). In the first week of August, soaking rains brought much needed moisture to Central and Southern Europe, however, the precipitation largely missed Germany and France.

Deteriorating conditions in the spring wheat oblasts, or regions, led to a reduction in **Kazakhstan** wheat production for 2020/21, lowered 7 percent from last month to 12.5 million metric tons. Analysis of the Normalized Difference Vegetation Index (NDVI) for Kazakhstan reveals reduced crop vigor in the main spring wheat producing regions of the country, where—like the EU+UK—below-average rainfall throughout July lowered the yield outlook.

Partially offsetting production cuts for the EU+UK and Kazakhstan are month-to-month increases for Russia (raised 1.5 million metric tons) and Brazil (raised 1.1 million). A record large wheat crop is now forecast for Brazil. At 6.8 million metric tons, estimated production for Brazil is up 12 percent from the July forecast and up 15 percent from the 2019/20 estimate. Conditions in Parana and Rio Grande do Sul, where approximately 90 percent of Brazil's wheat crop is sown, have been excellent and marked by timely rains ahead of planting in May and June. In Parana, the crop is slightly ahead of the normal pace; in Rio Grande do Sul clouds and high humidity are reported to have caused slight developmental delays though conditions remain above average for the nascent crop.

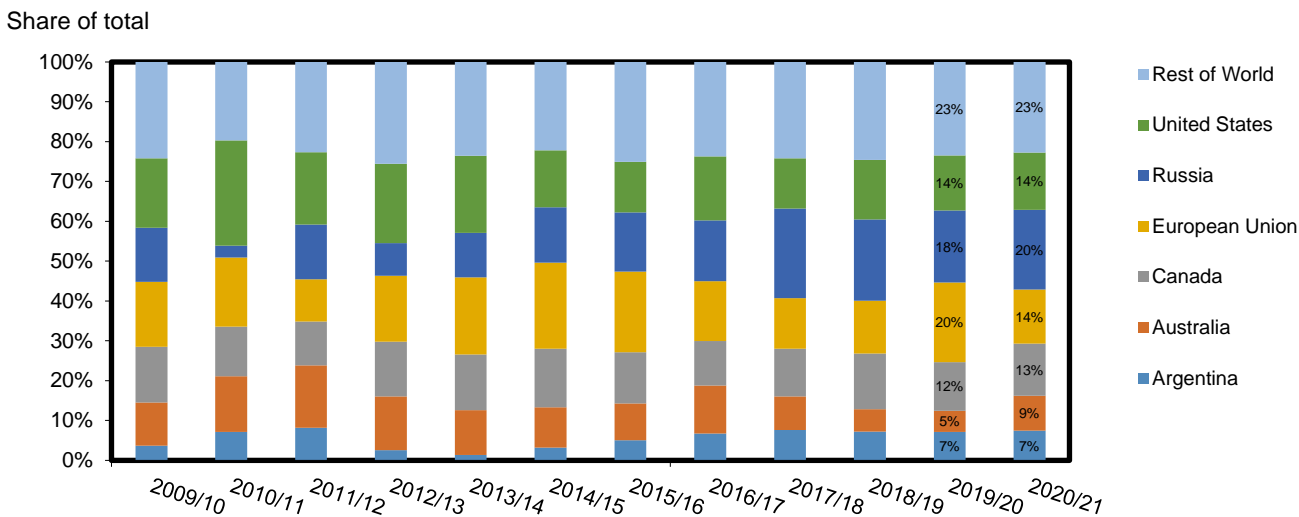
For Russia, this month's production increase is based on updated winter wheat area numbers released by Rossstat, the official government data source. A larger portion of the fall-sown winter wheat area is estimated to have survived winter and supports an increase in the harvested area and production forecast. Russia winter wheat production is raised 2 million metric tons to 58.0 million and is more than 10 percent larger than the 2019/20 harvest. Russia spring wheat production is lowered slightly this month (down 0.5 million metric tons) on a reduced yield outlook—a result of dryness throughout July in the main spring wheat growing regions. Spring wheat area is unchanged. Please see this month's USDA, FAS *World Agricultural Production* circular for more information.

Production Adjustments Drive Trade Updates

Based on expectation for a smaller wheat harvest, 2020/21 exports for the EU+UK are lowered 1.5 million metric tons this month to 25.5 million, down from 2019/20 exports of 38.0 million. In the previous marketing year, the EU+UK was the top-ranked wheat exporting region. In the new marketing year, production increases for the U.S. and Russia have led to the EU+UK falling to the third-ranked position while the U.S.—after a 1.0 million metric ton increase in exports—rises to the second-ranked position. Russia is expected to export 37.5 million metric ton again

assumes the top global wheat exporter position (fig. 8). Fully one-fifth of global wheat exports are forecast to originate from Russia in this marketing year after an increase in winter wheat production helped to lift the August export forecast by 1.5 million metric tons.

Figure 8
U.S. and Russia's share of global wheat exports expected to grow on higher production in 2020/21



Sources: USDA, Foreign Agricultural Service, *Production, Supply, and Distribution* database and Economic Research Service calculations based on USDA, National Agricultural Statistics Service data.

As with major exporting nations, local and regional wheat harvests also affect expectations for sales to key importing countries. With **Brazil's** wheat harvest now forecast to be record-large, import prospects are reduced by 0.5 million metric tons. The local wheat harvest is still several months away, and the nation continues to import wheat under the newly expanded tariff rate quota (TRQ) from non-Mercosur sources including the U.S. and Russia. In contrast to the record-wheat harvest that is forecast for Brazil, **Morocco's** crop has been affected by dryness, resulting in reduced production and tighter supplies. A strong pace of imports to date and expectations for a continuation of brisk sales to the country underpin a 0.2 million metric ton (month-to-month) increase in the import forecast, now raised to 6.2 million. **Pakistan's** wheat imports are raised 0.9 million metric tons this month to 1.0 million. This significant increase in imports is based on the elimination of a 60-percent import tariff, the pace of recent sales, and the issuance of several recent tenders—the result of tight beginning stocks. Exports to **Iran** are also raised this month based on a continuance of strong imports following a surge in 2019/20. Wheat production for **Iraq** is projected up 1.8 million metric tons in the new marketing year to 4.8 million and follows a 3.0 million metric ton harvest in 2019/20 which was nearly 33 percent larger than the year before. Growing supplies of wheat in Iraq have inhibited demand for imports and contribute to a sluggish pace of exports both in 2019/20 and thus far in 2020/21. Accordingly, Iraq's wheat imports are lowered 0.4 million metric tons this month to 2.5 million.

Global Carryout Raised on Reduced Use, Despite Supply Cut

This month's outlook for lower global production and supplies was offset by reduced use prospects, resulting in a net 2.0 million metric ton increase in global carryout. Global ending stocks remain record high at 316.8 million metric tons and are expected to limit upward price movement in export markets through the balance of the marketing year. Cuts in global feed and consumption, led by a 1-million metric ton-cut in feed use for the EU+UK, contribute to the outlook for burgeoning carryout. For the EU+UK, reduced demand for wheat feeding is a function of both a smaller wheat crop and substitution in feed rations to lower-cost grains such as barley and corn. Please see the June *Wheat Outlook* for a detailed discussion of wheat feeding. Of note, this month historical revisions have been made for wheat feeding in the EU+UK for years 2009/10 through 2013/14 resulting in a net 4.0 million metric ton reduction in feeding and associated increases in stocks. In subsequent years, stocks have been adjusted upward based on updated data and an enhanced understanding of EU+UK stocks accounting practices. For an updated timeseries of EU+UK balance sheet data, please see the USDA, FAS *Production, Supply and Distribution* database.

International Feature: An Overview of the Locust Outbreak in Africa and Implications for 2020/21 Wheat Supplies

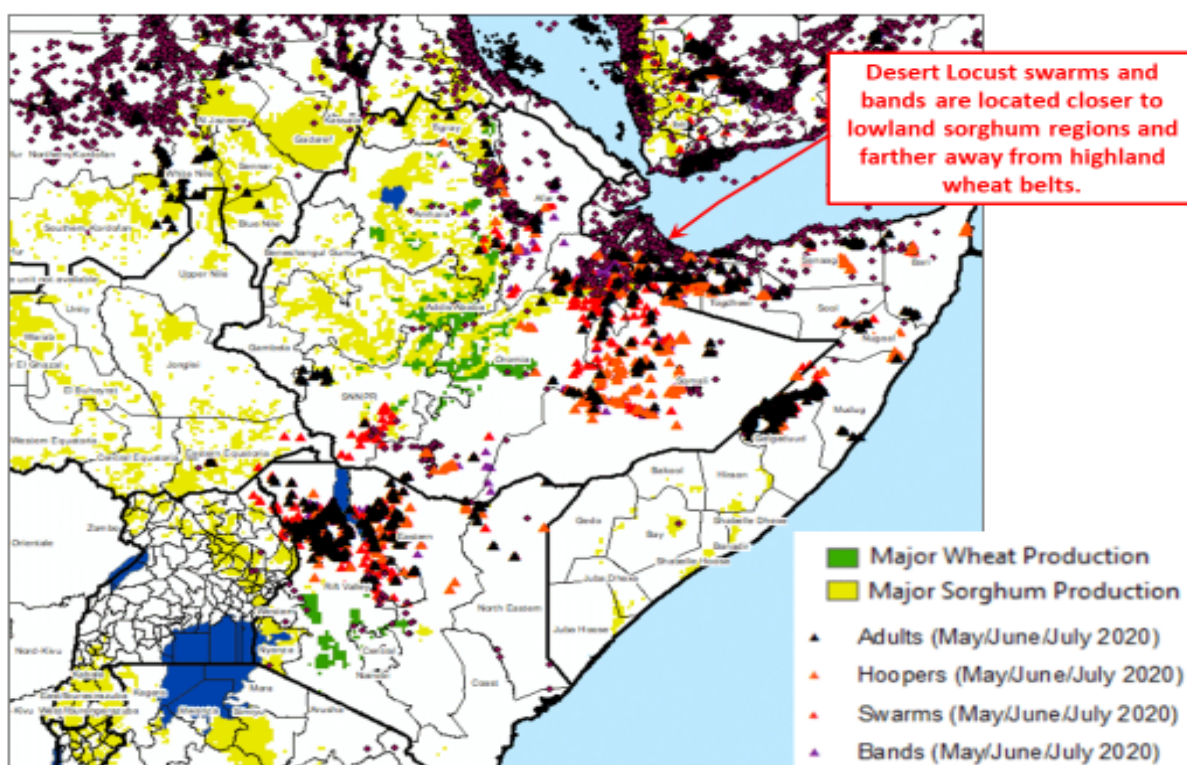
The Horn of Africa is facing what the U.N. Food and Agricultural Organization (FAO) describes as the “worst desert locust crisis in 25 years.” As of August 7, 2020, the FAO Locust Watch newsletter reported that 10 countries: Djibouti, Eritrea, Ethiopia, Kenya, Somalia, South Sudan, the Sudan, Uganda, the United Republic of Tanzania, and Yemen are among those most affected by the desert locust outbreak. The current locust swarm was spawned when a mid-2018 cyclone brought a significant amount of moisture to the Rub'al Khali or “Empty Quarter” of the Arabian Desert—an area of mostly arid land that includes sections of Saudi Arabia, Oman, the United Arab Emirates, and Yemen. The initial hit of moisture fostered vegetation development that supported the growth of the first wave of locusts. Normally, dry weather would follow, and the pests would die out; however, a second cyclone in late 2018 brought yet more rain to nearly the same location as the first, further encouraging plant growth and setting the stage for a surge in the desert locust population. Into early 2019, the burgeoning pest population started to migrate out of the Empty Quarter, traveling via winds across the Red Sea, to the continent of Africa.

Once in Africa, the desert locusts multiplied and spread, largely in the arid to semi-arid lands (ASAL). The ASAL tend to have less than 400 millimeters of rainfall per year and are typically

rangeland and marginal, low-elevation croplands where millet, corn, sorghum, and rice are cultivated. In contrast to these grains, wheat tends to be grown in relatively high elevation (between 3000 to 3700 meters), mountainous regions with cooler temperatures (fig. 9). Desert locusts are located closer to lowland sorghum regions and farther away from highland wheat belts. Based on geography alone, the net impact of the recent locust plague is expected to be minimal on regional wheat production. Further, the UN FAO is leading a widespread spraying effort which, in combination with local spraying activities, has been effective in reducing locust numbers.

Figure 9

Desert locusts located close to lowland sorghum but far away from highland wheat production zones



Sources: Map created by Curt Reynold of USDA, Foreign Agricultural Service, International Production Assessment Division using data from the United Nations Food and Agriculture Organization Desert Locust Hubs report (locusts' locations, maturity) and the International Food Policy Research Institute's Spatial Production Allocation Model (Africa crop production zones).

A recent analysis of historical locust events in Eastern Africa shows that crops losses attributable to locusts tend not to drive below-average crop production (Food Security and Nutrition Working Group, February 2020). When national crop production was below average in the presence of locusts, typically other factors such as too dry or too wet conditions were extenuating and more influential. Abundant moisture tends to support yields and the current weather forecast for much of the Horn of Africa is for a continuation of greater-than-normal probability of above-average-to-average rainfall. Local grain production for crops still in the

maturity phases is expected to benefit from this moisture; crop losses from locusts may be more severe for agro-pastoralists who grow lowland sorghum near resident locust swarms. In summary, the desert locust outbreak in Africa is not expected to significantly affect regional supplies of wheat for the 2020/21 marketing year. Further, record-high global wheat supplies stand ready to augment potential regional shortfalls and sizable food donations to countries such as Yemen, have already begun to show up in exports sales reports.

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