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Fewer Projected Imports from Mexico in 2014/15 Translate into Lower Ending Stocks

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The USDA lowered total projected U.S. sugar supplies by 78,000 short tons, raw value (STRV) for 2014/15. Projected domestic production remains unchanged as an increase in projected cane sugar from Texas was offset by lower projected beet sugar due to a revised expectation for the 2015/16 sugarbeet crop. Projected imports for 2014/15 are lowered 78,000 STRV. Imports from Mexico are lowered 100,000 STRV to 1.426 million STRV, based on pace-to-date shipment data, relative competitiveness with raw sugar from TRQ countries, and the current stock levels of U.S. sugar refiners. Imports under quota are increased 22,000 STRV based on an announced increase of the FY2015 specialty sugar quota. Total use for 2014/15 remains unchanged at 12.085 million STRV, including domestic food and beverage deliveries that remain unchanged at 11.750 million STRV. The projected stocks-to-use ratio for 2014/15 is 14.3 percent, down from the previous month's projection of 15.0 percent.

Projected U.S. production for 2015/16 is raised 45,000 STRV, as projected beet sugar production declined 60,000 STRV and cane sugar production increased 105,000 STRV. Both changes were based on harvested acreage estimates reported by the National Agricultural Statistics Service's *Acreage* report released on June 30. Projected imports under quota for 2015/16 are increased 121,000 STRV based on the announced specialty sugar quota for FY2016. Imports from Mexico are increased 27,000 STRV due to the increased calculated U.S. Needs formula, as specified in the suspension agreement signed by the United States and Mexico in December 2014. The stocks-to-use ratio for 2015/16 is 13.5 percent, up from the previous month's projection of 12.6 percent.

Mexican sugar production for 2014/15 is projected at 5.985 million metric tons, actual weight (MT), increased 45,000 MT from the previous month based on updated weekly production data. Exports were lowered 136,000 MT to 1.370 million MT based on pace-to-date data for shipments to both the United States and third countries. Changes in the 2014/15 outlook translate to a 180,000 MT increase to beginning stocks for 2015/16. Combined with a 23,000 MT increase in 2015/16 exports to the United States, the projected stocks-to-consumption ratio for 2015/16 is 28.2 percent, up from the previous month's projection of 24.6 percent.

U.S. maple syrup production in 2015 increased 6.3 percent compared with the previous year to 3.4 million gallons. Prices reported in 2014 were \$36 per gallon, the second straight year of yearly declines.

United States Sugar Supply and Use for FY2015

Estimated U.S. domestic sugar production in the U.S. Department of Agriculture's (USDA) *World Agricultural Supply and Demand Estimate* (WASDE) for 2014/15 is 8.560 million short tons, raw value (STRV), unchanged from the previous month's projection, with offsetting changes to beet sugar and cane sugar production.

Table 1 -- U.S. sugar: supply and use, by fiscal year (Oct./Sept.), July 2015.

Items	2013/14 (estimate)	2014/15 (estimate)	2015/16 (forecast)	2013/14 (estimate)	2014/15 (estimate)	2015/16 (forecast)
	1,000 Short tons, raw value			1,000 Metric tons, raw value		
Beginning stocks	2,158	1,810	1,729	1,958	1,642	1,569
Total production	8,462	8,560	8,765	7,676	7,766	7,951
Beet sugar	4,794	4,780	4,980	4,349	4,336	4,518
Cane sugar	3,667	3,780	3,785	3,327	3,429	3,434
Florida	1,763	1,975	1,875	1,599	1,792	1,701
Louisiana	1,591	1,520	1,590	1,444	1,379	1,442
Texas	145	105	130	132	95	118
Hawaii	168	180	190	153	163	172
Total imports	3,742	3,444	3,364	3,394	3,125	3,052
Tariff-rate quota imports	1,302	1,608	1,491	1,181	1,459	1,352
Other program imports	305	400	315	277	363	286
Non-program imports	2,135	1,436	1,559	1,937	1,303	1,414
Mexico	2,130	1,426	1,549	1,932	1,294	1,405
Total supply	14,362	13,814	13,858	13,029	12,532	12,572
Total exports	306	200	200	278	181	181
Miscellaneous	0	0	0	0	0	0
Deliveries for domestic use	12,246	11,885	12,010	11,109	10,782	10,895
Transfer to sugar-containing products for exports under reexport program	82	100	100	74	91	91
Transfer to polyhydric alcohol, feed, other alcohol	29	35	35	27	32	32
Commodity Credit Corporation (CCC) sale for ethanol, other	316	0	0	287	0	0
Deliveries for domestic food and beverage use	11,819	11,750	11,875	10,722	10,659	10,773
Total Use	12,552	12,085	12,210	11,387	10,963	11,077
Ending stocks	1,810	1,729	1,648	1,642	1,569	1,495
Private	1,810	1,729	1,648	1,642	1,569	1,495
Commodity Credit Corporation (CCC)	0	0	0	0	0	0
Stocks-to-use ratio	14.42	14.31	13.50	14.42	14.31	13.50

Source: U.S. Dept. of Agriculture, Economic Research Service, Sugar and Sweetener Outlook.

Cane sugar production for 2014/15 is projected at 3.780 million STRV, up 15,000 STRV from the previous month. Production in Texas is increased from 90,000 in the June report to 105,000 STRV. Poor weather conditions in Texas throughout the harvest season have hindered the current year's crop. According to reports gathered by the Farm Service Agency, however, the region has been harvesting cane through June into July, unprecedented in continuing so far into the year in this region.

Beet sugar production for 2014/15 is projected at 4.780 million STRV, down 15,000 STRV from the previous month. The reduction is attributed to less projected sugar production from the 2015/16 sugarbeet crop that will be harvested early and accounted for in FY2015, compared with earlier estimates. The USDA's National Agricultural Statistics Service (NASS) June 30 *Acreage* report indicated that there were fewer acres of sugarbeets planted compared with the March *Prospective Plantings* report. Additional discussion can be found in the subsequent section describing the FY2016 projections.

U.S. sugar imports under quota programs for 2014/15 are projected to total 1.608 million STRV, a 22,000 STRV increase from the June projection. The increase is the result of the June announcement by the USDA of the increase of the FY2015 specialty sugar quota.

Non-quota imports for 2014/15 are reduced 100,000 STRV, as imports from Mexico are projected to total 1.426 million STRV, down from the previous month's projection of 1.526 million STRV. According to the terms of the "Agreement Suspending the Countervailing Duty Investigation of Sugar From Mexico" signed by the U.S. Department of Commerce (USDOC) and the Government of Mexico in December 2014, an Export Limit for Mexico is established at a level of 100 percent of "U.S. Needs," as defined in the agreement based on the March 2015 WASDE report. The USDOC established the FY2015 Mexican Export Limit at 1.526 million STRV. In addition, the terms of the "Agreement Suspending the Antidumping Investigation of Sugar From Mexico," signed by the same parties in December 2014, established the minimum price at which Mexican sugar could be exported under license to the United States. The pace of imports from Mexico had been lagging from January to April 2015 compared with recent years, due to uncertainties stemming from the new policy and the lack of sugar price competitiveness from Mexico compared with raw sugar from TRQ countries due to the price restrictions. These factors shifted the marketing and shipping of Mexican sugar to the United States into the later portion of the 2014/15 Export Limit period. Volumes of imported sugar from Mexico have picked up in May and June, as reported by the Foreign Agricultural Service (FAS). Based on historical shipments, there should be enough logistical capacity to meet the FY2015 Export Limit. Reports for the current ship lineup in Mexican ports to export sugar have been relatively modest, however, given the amount of sugar against the Export Limit. Given the price restrictions established by the suspension agreement and the current raw sugar stock levels held by U.S. sugar refiners, imports from Mexico are not expected to reach the full Export Limit.

Total U.S. sugar imports for 2014/15 are projected to be 3.444 million STRV—down 78,000 STRV, with the decline in imports from Mexico offsetting the increase of the specialty sugar quota. With beginning stocks unchanged from the previous month at 1.810 million STRV, sugar supplies are projected to total 13.814 million STRV, down 78,000 STRV from the June report.

No changes were made to projections for sugar use for 2014/15 in the July WASDE. Total use is projected at 12.085 million STRV, with food and beverage deliveries remaining at 11.750 million STRV. Ending stocks for 2014/15 are projected to total 1.729 million STRV, down 78,000 STRV from the previous month due to the relatively lower projected imports. The resulting stocks-to-use ratio is projected at 14.31 percent, down from the previous month's projection of 14.95 percent.

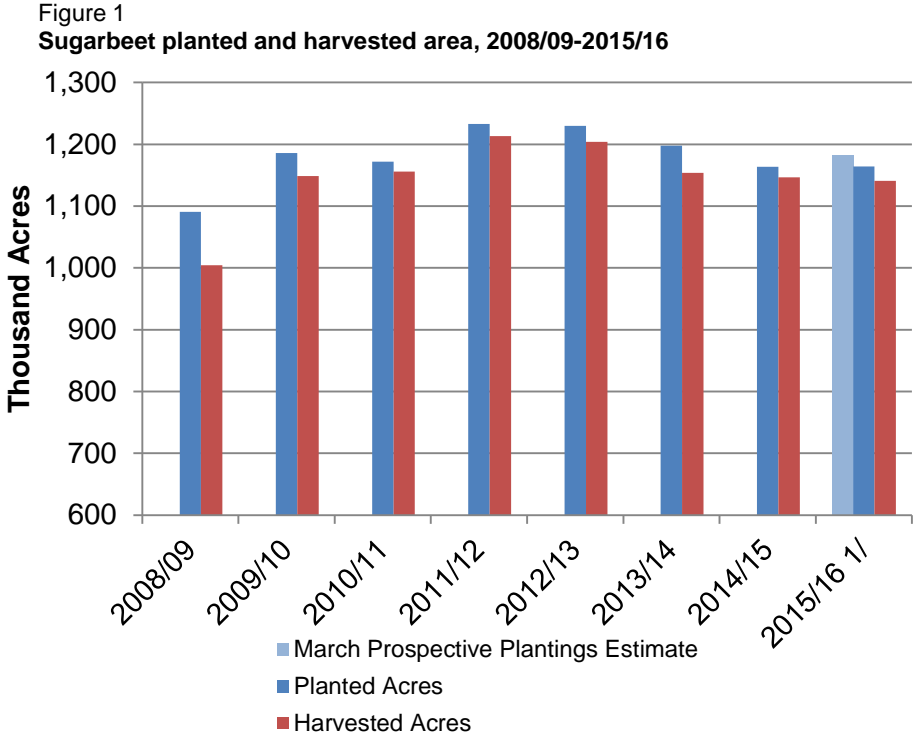
United States Sugar Supply and Use for FY2016

For 2015/16, changes to the 2014/15 balance table result in beginning stocks declining from 1.807 million STRV to 1.729 million STRV.

Total domestic sugar production for 2015/16 is projected to total 8.765 million STRV, up 45,000 STRV from the previous month. The USDA's National Agricultural Statistics Service (NASS) released 2015 harvested acreage projections for both sugarbeets and sugarcane in its June 30 *Acreage* report. This new information was incorporated into the beet and cane sugar productions projections. NASS has not yet published any yield forecasts for the 2015 beet or cane crops. As a result, the current projections reflect estimates from the interagency committee based on historical trends and information gathered from industry sources. The first official 2015/16 beet and cane yield estimates from NASS will be published in August's *Crop Production* report.

Beet sugar production for 2015/16 is projected at 4.980 million STRV, down 60,000 STRV from the June projection. NASS projected 2015 planted area for sugarbeets at 1.164 million acres, which was reduced from the published estimate of 1.182 million acres in its March *Prospective Plantings* report. Harvested area for 2015/16 is forecast at 1.141 million acres, which is a 0.6 percent decline from 2014 harvested acres. Projected sugar production from the 2015/16 crop is currently projected at 5.135 million STRV, down from the previous month's projection of 5.200 million STRV. Of the projected total coming from the current crop, the result of relatively early planting this

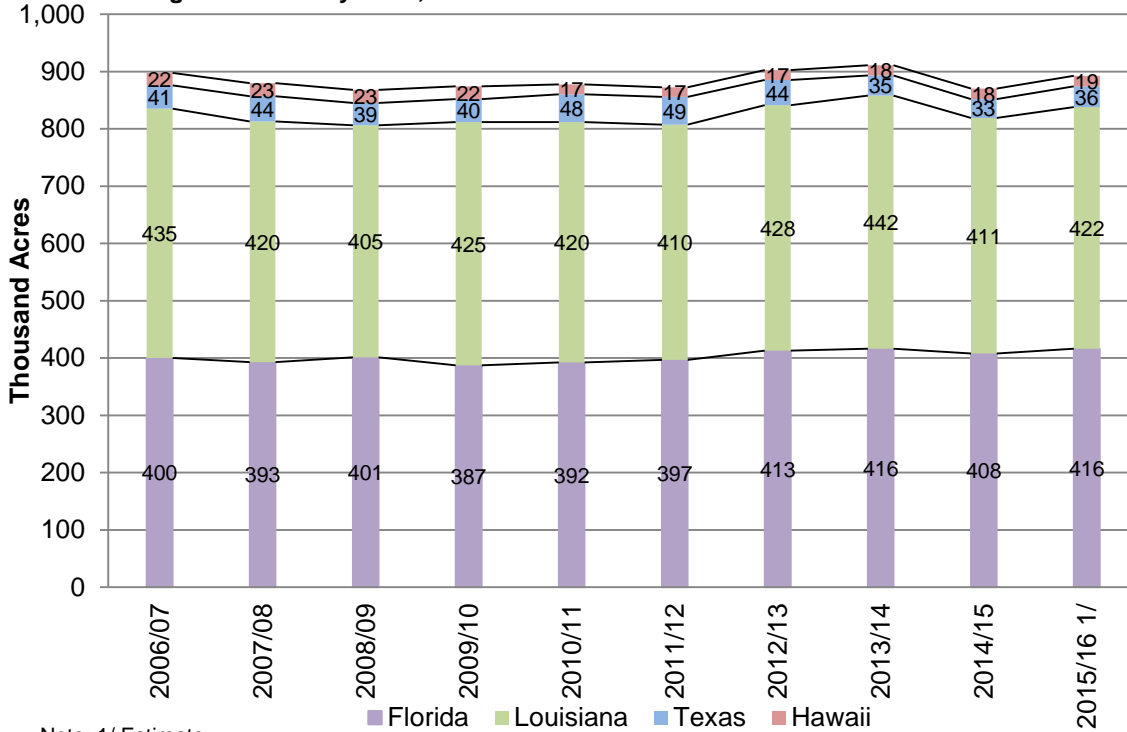
spring and generally favorable growing conditions thus far in the year support larger than average, early harvest sugar production, which would be accounted for in FY2015. The production from the remainder of the 2015/16 crop, along with an assumed average early production figure for the 2016/17 crop, result in the current beet sugar projection.



Note: 1/ Estimate
 Source: National Agricultural Statistics Service , USDA.

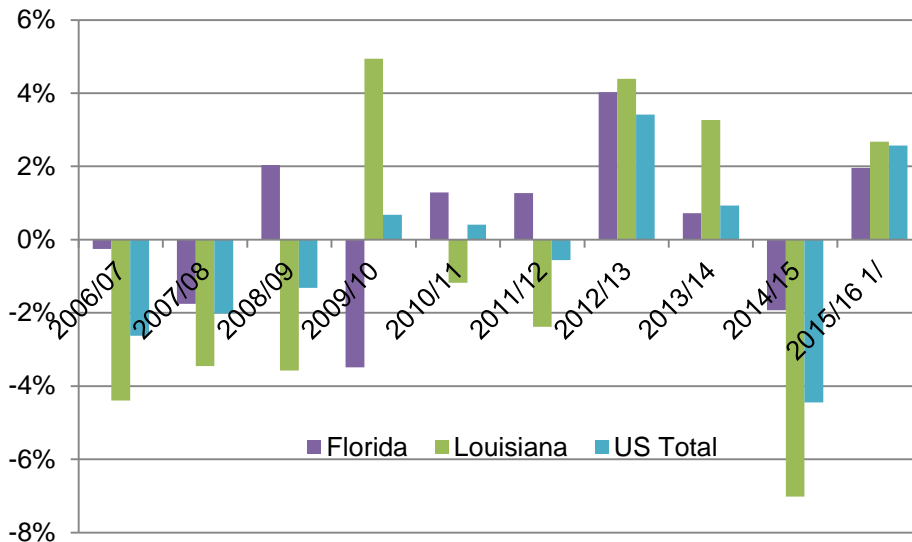
Cane sugar production for 2015/16 is projected to be 3.785 million STRV, a 105,000 STRV increase from the previous month’s projection. NASS forecasts that total 2015 harvested cane acreage in the United States is 892,700 acres, up from the previous year’s total of 870,300—or up 2.6 percent. Florida’s cane sugar production for 2015/16 is projected at 1.875 million STRV, a 50,000 STRV increase from the previous month. Forecast harvested area for Florida in 2015/16 is 416,000 acres, up from 408,000 acres in 2014/15. Louisiana cane sugar production is projected at 1.590 million STRV for 2015/16, an increase of 55,000 STRV from the previous month. Projected production for 2015/16 for Hawaii and Texas remain unchanged from the previous month, at 190,000 and 130,000 STRV, respectively. NASS forecasts 18,200 acres of sugarcane harvested for Hawaii in 2015/16 (up 2.7 percent from 2014/15) and 36,000 acres for Texas (up 8.7 percent from the weather-affected 2014/15 crop).

Figure 2
Harvested sugarcane area by State, 2006/07-2015/16



Note: 1/ Estimate
Source: National Agricultural Statistics Service , USDA.

Figure 3
Sugarcane harvested area year-over-year change, 2006/07-2015/16



Note: 1/ Estimate
Source: National Agricultural Statistics Service , USDA.

Total U.S. imports for 2015/16 are projected at 3.364 million STRV, a 149,000 STRV increase from the previous month. Imports under quota are projected to increase 121,000 STRV from the June report to 1.491 million STRV. This is due to the announcement of the specialty sugar quota for FY2016 by USDA on June 12. Non-quota imports are projected at 1.559 million STRV, with Mexico accounting for 1.549 million STRV—both projections 27,000

STRV above the previous month's projection. The projections for imports from Mexico are formulated using the definition for U.S. Needs, as defined by the "Agreement Suspending the Countervailing Duty Investigation of Sugar From Mexico." The agreement specifies that first Export Limit set in the fiscal year issued after the July WASDE is 70 percent of U.S. Needs. Since the agreement specifies that the Export Limit is likely to reach 100 percent of U.S. Needs, however, the current WASDE projection reflects total U.S. Needs from the July WASDE.. The Export Limit will be updated following the December 2015 WASDE.

Total sugar use for 2015/16 is projected at 12.210 million STRV, unchanged from the previous month. Domestic deliveries for food and beverage also remain unchanged at 11.875 million STRV.

Ending stocks for 2015/16 are projected at 1.648 million STRV, up 116,000 STRV due to the increase in total supply projections. The stocks-to-use ratio for 2015/16 is projected at 13.5 percent, which is the target level specified in the suspension agreement.

Mexico Sugar Supply and Use in FY2015

Sugar production in Mexico for 2014/15 is projected to total 5.985 million metric tons, actual weight (MT), a 45,000 MT increase from the previous month. According to data from Mexico's *Comité Nacional Para Desarrollo de la Caña de Azúcar* (Conadesuca), through July 4 the 2014/15 sugar production is 5.977 million MT. Although a few mills in Mexico were likely continuing to operate after the July 4 report, the 2014/15 harvest season is nearly complete. Heavy, damaging rains in the Veracruz region during the spring reduced production in the country's largest production region for several weeks. Weekly sugarcane production data showed that late-season harvest figures followed a similar trajectory to that of the previous year's harvest, despite the mid-season production slowdown in Veracruz.

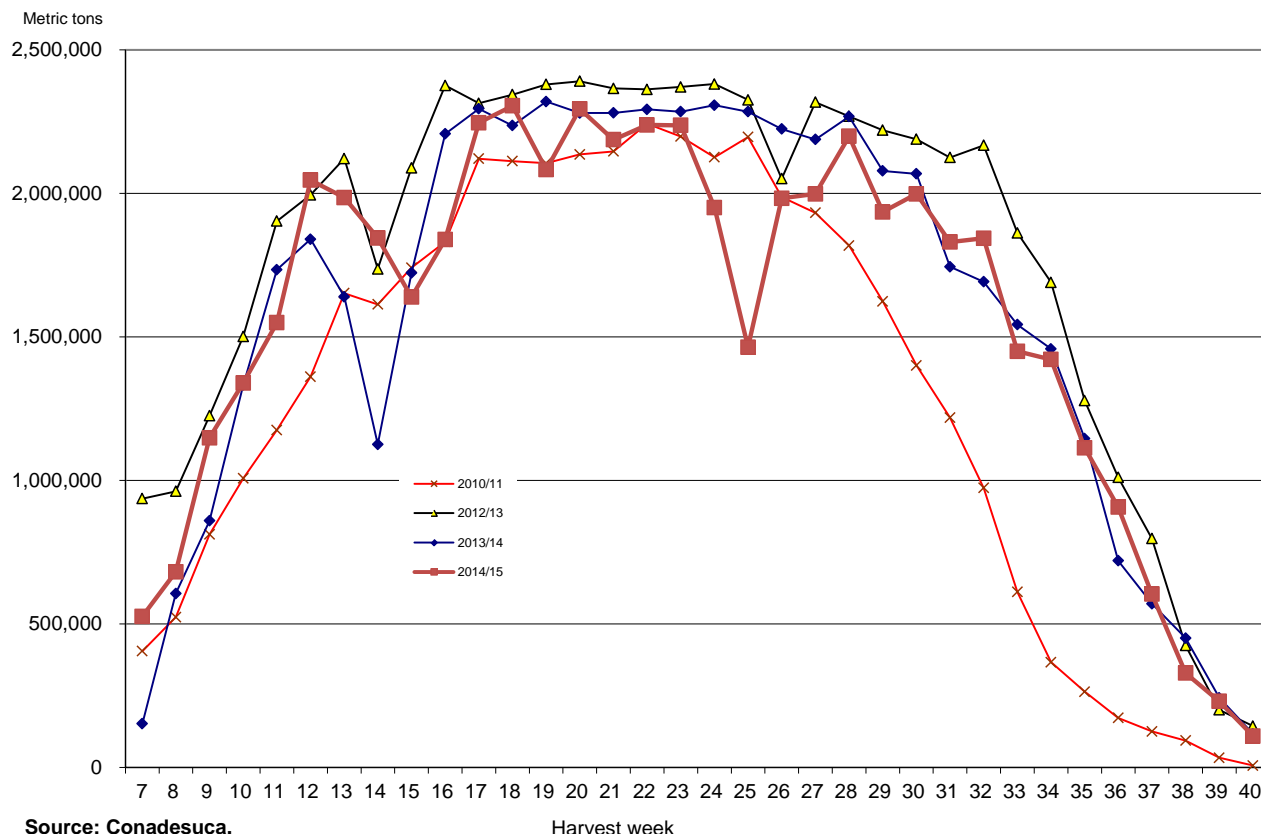
Table 3 -- Mexico sugar supply and use, 2012/13 - 2013/14 and projected 2014/15, July 2015

Items	2013/14 (estimate)	2014/15 (estimate)	2015/16 (forecast)
	1,000 metric tons, actual weight		
Beginning stocks	1,460	831	1,027
Production	6,021	5,985	6,000
Imports	131	155	155
Imports for consumption	9	10	10
Imports for sugar-containing product exports (IMMEX) 1/	123	145	145
Total supply	7,613	6,972	7,183
Disappearance			
Human consumption	4,098	4,250	4,308
For sugar-containing product exports (IMMEX)	324	324	324
Statistical adjustment	-151	0	
Total	4,271	4,574	4,632
Exports	2,511	1,370	1,335
Exports to the United States & Puerto Rico	1,823	1,220	1,325
Exports to other countries	689	150	10
Total use	6,782	5,944	5,967
Ending stocks	831	1,027	1,216
	1,000 metric tons, raw value		
Beginning stocks	1,548	881	1,089
Production	6,383	6,344	6,360
Imports	139	165	165
Imports for consumption	9	11	11
Imports for sugar-containing product exports (IMMEX)	130	154	154
Total supply	8,069	7,390	7,614
Disappearance			
Human consumption	4,344	4,505	4,567
For sugar-containing product exports (IMMEX)	343	343	343
Statistical adjustment	-160	0	0
Total	4,527	4,848	4,910
Exports	2,662	1,453	1,415
Exports to the United States & Puerto Rico	1,932	1,294	1,405
Exports to other countries	730	159	11
Total use	7,189	6,301	6,325
Ending stocks	881	1,089	1,288
Stocks-to-human consumption (percent)	20.3	24.2	28.2
Stocks-to-use (percent)	12.3	17.3	20.4
High fructose corn syrup (HFCS) consumption (dry weight)	1,372	1,420	1,420

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

Source: USDA, WASDE and ERS, Sugar and Sweeteners Outlook; Conadesuca.

Figure 4
Mexican sugarcane production, by week of harvest, 2010/11-2014/15



Projected beginning stocks and imports for 2014/15 remain unchanged from the previous month’s projections, at 831,000 MT and 155,000 MT, respectively. As a result, total supply for 2014/15 is projected at 6.972 million MT, a 45,000 MT increase from the previous month, reflecting the increased production expected.

Domestic deliveries in Mexico for 2014/15 remain unchanged from the previous month, projected at 4.574 million MT. Likewise, the estimated components of domestic deliveries remain unchanged, with human consumption estimated at 4.250 million MT and sugar for Mexico’s sugar-containing products export program (IMMEX) estimated at 324,000 MT. Additionally, estimated consumption of high-fructose corn syrup (HFCS) in 2014/15 remains unchanged at 1.420 million MT.

Estimated exports for 2014/15 are lowered 136,000 MT, totaling 1.370 million MT. Exports to the United States are estimated at 1.220 million MT, lowered 86,000 MT due to the factors described in the previous section that are affecting the pace of shipments for the current Export Limit Period. Additionally, exports to other countries are lowered 50,000 MT to 150,000 MT based on the current pace of shipments. Relatively low global raw sugar prices have made it more difficult for Mexican sugar to compete in export markets.

Projected ending stocks for 2014/15 are 1.027 million MT, a 181,000 MT increases from the June report, as projected total supplies increased and total use declined. The result is a projected stocks-to-consumption ratio of 24.17 percent, up from 19.92 percent as projected in June.

Mexico Sugar Supply and Use in FY2016

The changes to the 2014/15 Mexican sugar balance table result in 2015/16 beginning stocks increasing 181,000 MT to 1.027 million MT. Projected production for 2015/16 remains unchanged from the previous month at 6.000

million MT. Imports for IMMEX for 2015/16 are projected at 145,000 MT and imports for human consumption at 10,000, both unchanged from the June report. Therefore, total supplies for 2015/16 are projected at 7.183 million MT, up 181,000 MT due the increased stocks carried over from 2014/15.

Domestic deliveries for 2015/16 remain unchanged from the June report, projected at 4.632 million MT. Human consumption remains projected at 4.308 million MT, while IMMEX deliveries are projected at 324,000.

Projected exports for 2015/16 are 1.335 million MT, up 23,000 MT from the previous month. The increase is due to the 23,000 MT increase in exports to the United States, based on the U.S. Needs established after the July WASDE report. Projected exports to other countries remain at 10,000 MT.

Projected ending stocks for 2015/16 are 1.216 million MT, up 157,000 MT from the previous month due to the increase in projected supplies eclipsing the increase in projected use. The result would be a relatively high 28.21 percent stocks-to-consumption ratio.

Domestic Maple Syrup Production Resumes Trend Upward

Maple syrup production in the United States was up 203,000 gallons, or 6.3 percent, this year after declining 312,000 gallons in 2014. The 3.4 million gallons harvested in 2015 are more than 3 times the syrup crop in 1995. Over the next 20 years, starting in 1996, U.S. production increased an average 5.8 percent annually. The annual crop growth rates from 1996 to 2015 averaged 6.5 percent for the producers in New England, 5.7 percent for New York and Pennsylvania, and 3.8 percent in the Midwest States. The three largest State syrup producers—Vermont, New York, and Maine—posted corresponding average output growth rates of 6.9, 5.4, and 6.3 percent per year. These three States accounted for 75 percent of the total syrup production in 2015.

The syrup yield per tree tap averaged 0.287 gallon in 2015, up 2 percent from 0.281 in 2014. The highest yield was 0.31 gallon per tree tap in Vermont, the largest U.S. producer. Maine's yield of 0.3 gallon was the next highest. The New England States, including New Hampshire, Massachusetts, and Connecticut, have an average yield of 0.3 gallon per tap in 2015. Maple trees in the Midwest yield 0.274 gallon of syrup per tap, slightly more than the 0.261 gallon per tree in New York and Pennsylvania. The total number of tree taps this year almost reached 12 million, the largest on record. The number of taps added per year grew by an average 4 percent per year starting in 2002, or 356,000 new taps each year. In 2015, 464,000 more taps produced sap in addition to the 11.4 million taps from 2014. Sixty-one percent of the nearly 12 million taps were located in New England.

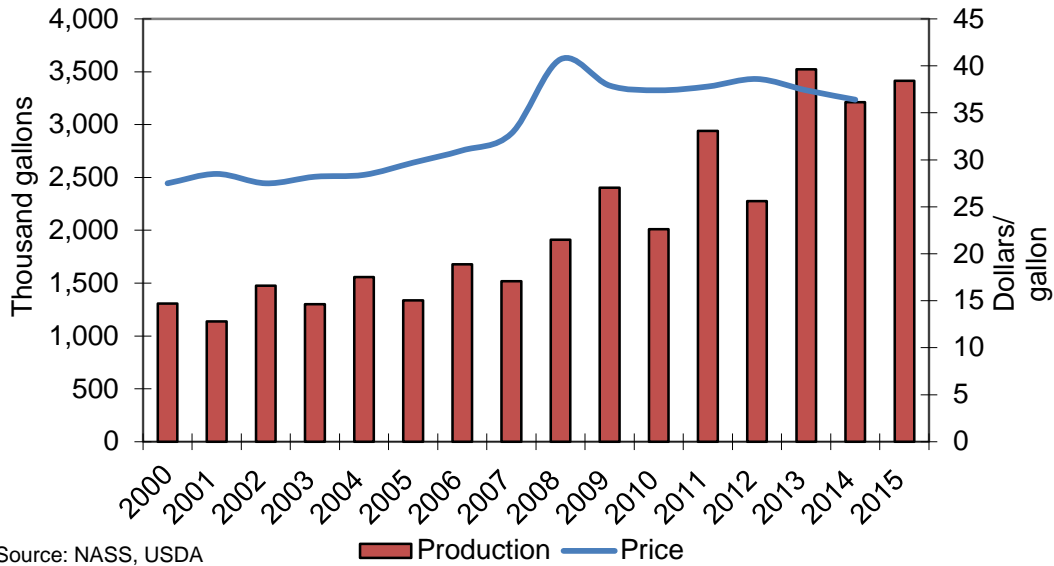
Maple Syrup Prices and Production Value Are Lower in 2014

The value of U.S. maple syrup production in 2014 fell 11 percent to \$117 million from \$132 million in 2013. The principal reason for this decline is lower prices received by the syrup farmers for the 2014 crop. The average per gallon price was \$36.40, down \$1 from \$37.40 in 2013. Syrup prices ranged from \$70.90 per gallon in Connecticut to \$31.50 in Maine. The reason for the wide divergence in average prices is the type of sales—largely retail in Connecticut and bulk in Maine. The production value per tree tap amounted to \$10.24 in 2014, down from \$11.60 per tap in 2013. After adding imports (almost all from Canada) and subtracting exports, the average value of domestic syrup sales was \$270 million in 2014, or \$2.19 per U.S. household.

In terms of volume and value, U.S. imports of maple syrup (from Canada) are bigger than domestic production. Although imports increased 2 percent to 4.9 million gallons in 2014, domestic consumption dropped because of lower production. Domestic syrup consumption totaled 7.1 million gallons in 2014, which were worth \$270 million. Consumption per U.S. household was 7.3 ounces, or 2.8 ounces per capita, which are 2 percent lower than in 2013. The import share of U.S. syrup consumption was 69 percent based on volume in 2014. The average share of imports in consumption was 79 percent over the past decade. Because of this high import share, U.S. syrup imports from Canada generally rise as Canadian syrup production increases. And Canadian production, which is at least three times larger than that of the United States, tends to mirror the U.S. production pattern largely because of similar

weather conditions. Average syrup prices received in Canada are typically lower than U.S. prices, in part due to Canadian Government subsidies and large stocks north of the border.

Figure 5
Maple syrup production and prices, 2001-2015



Sugar Content of Sap Is Linked to Seed Production

Despite three fewer days on average in the 2015 tapping season than in 2014, U.S. maple syrup production was up this year, attributed mostly to higher syrup yield per tap and 4 percent more tree taps than last year. Higher yields or sap flow are usually assumed to be dependent on favorable weather conditions (precipitation, low night and high day temperatures) and a longer harvest season. However, a new study instead links higher syrup yields to a tree’s lower preceding seed production. According to a recent paper by Josh Rapp and Elizabeth Crone (“Maple Syrup Production Declines Following Masting,” *Forest Ecology and Management*, October 2014), the year after low seed production by maple trees usually produces sap with a higher sugar content. Because seeds and sucrose are made from carbohydrates stored in trees, if fewer carbohydrates are expended for seeds, more carbohydrates are available for sucrose production. Thus, since seed production by maple trees was low in 2014, it was expected that sugar yield in the 2015 sap harvest will be higher. Indeed, the syrup yield per tap was 2 percent higher in 2015.

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