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Outlook

Outlook for U.S. Agricultural Trade

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FY 2020 U.S. Agricultural Exports Forecast at \$136.5 Billion; Imports at \$130.2 Billion

The COVID-19 outbreak has created a shock to world economies that will cause an unusually high level of uncertainty for the foreseeable future. U.S. agricultural exports in Fiscal Year (FY) 2020 are projected at \$136.5 billion, down \$3.0 billion from the February forecast, primarily due to reductions in bulk commodities including soybeans, cotton, corn, and wheat. Projections for soybean exports are reduced \$1.9 billion from the previous estimate to \$16.5 billion for FY 2020 due in part to increasingly competitive Brazilian exports. Cotton exports are forecast down \$1.0 billion on lower volumes and unit values as the COVID-19 pandemic has reduced foreign demand. Corn exports are projected at \$8.0 billion, down \$500 million on lower unit values, which are pressured by ample exportable supplies and weak domestic use for fuel ethanol. The forecast for wheat exports is down \$300 million to \$6.1 billion, as larger global supplies and uncompetitive U.S. pricing reduce prospective volume. Livestock, poultry, and dairy exports are unchanged from the February projection of \$32.4 billion, as stronger demand for pork and dairy products offsets a decline for beef and poultry products. The forecast for horticultural exports is unchanged at \$35.5 billion.

U.S. agricultural imports in FY 2020 are projected at \$130.2 billion, down \$2.3 billion from the February forecast. This decline is primarily driven by expected decreases in imports of horticultural products such as beer, fresh fruit, and fresh vegetables.

The forecasts in this report are based on policies in effect at the time of the May 12 *World Agricultural Supply and Demand Estimates (WASDE)* release.

Table 1--U.S. agricultural trade, fiscal years 2014-20, year ending September 30

Item	2014	2015	2016	2017	2018	2019	Forecast fiscal year*	
							2020	
							Feb.	May
<i>Billion dollars</i>								
Exports	152.3	139.8	129.6	140.2	143.4	135.5	139.5	136.5
Imports	109.3	114.2	113.0	119.1	127.5	130.9	132.5	130.2
Balance	43.1	25.5	16.6	21.1	15.9	4.6	7.0	6.3

*Reflects forecasts in the May 12, 2020, *World Agricultural Supply and Demand Estimates* report.

Source: USDA, Economic Research Service and Foreign Agricultural Service analysis and forecasts using data from U.S. Department of Commerce, Bureau of the Census.

Economic Outlook

COVID-19 Expected to Stifle Trade and Growth in FY 2020

The global health crisis is damaging the ability of individuals and firms to produce goods and services while simultaneously changing the consumption behavior of consumers and businesses across the globe. As a result of this global tragedy, real per capita world gross domestic product (GDP) is forecast to decline by 5.5 percent in FY 2020 relative to the prior year.

The economic effects of the COVID-19 pandemic will vary immensely across individuals, industries, and countries, as public and private responses will determine its full impact. The diversified U.S. economy will help to mitigate the economic downturn facing many businesses; however, the economy's reliance on consumer spending will be a critical issue going forward. The U.S. consumer is a driving factor in the economy, and the effects of negative income shocks and the resulting shifts in spending patterns will have ripple effects through the economy. Real per capita GDP growth for the United States for FY 2020 is adjusted down from the February forecast of 1.1 percent to -7.1 percent. The adjusted forecast amounts to a reduction in economic activity of \$1.8 trillion during FY 2020.

The sharp decline in oil prices, coupled with the economic shock from the virus, will cause many economies to contract from the prior year. The Canadian and Australian economies rely heavily on exports of resource products that include oil and gas and are forecast to have per capita GDP growth rates of -8.8 percent and -7.3 percent, respectively, in FY 2020. Mexico, whose economy relies strongly on trade with the United States, is forecast to have a -9.6 percent GDP per capita growth in FY 2020.

The real GDP per capita growth rate in FY 2020 for the Euro Zone was adjusted down from the February forecast of 0.8 percent to -8.5 percent. The size of the contraction in European countries' economies will vary, with France, Italy, and Spain among the hardest-hit economies and the German economy faring better. As is the case in the United States, European economies depend heavily on consumer spending, including tourism, a sector that has been particularly affected by the pandemic.

As the first country to implement public health-necessitated lockdowns, China has begun to reopen its economy, though shifting lockdowns are anticipated until the disease can be fully managed. Portions of China's economy are anticipated to continue growing while still being negatively affected by the global slowdown, especially with respect to international trade. China's

forecast GDP per capita growth rate for FY 2020 is 0.4 percent, down from the FY 2019 rate of 5.7 percent. In Japan and South Korea, domestic spending is expected to fall less than other countries given more effectively contained outbreaks. South Korea is forecast to have -1.0 percent growth in per capita GDP in FY 2020, while the forecast for Japan is adjusted down about 6 percent compared with the February forecast from 0.7 percent to -5.3 percent. The decline in Japan's economy is a result of falling exports to major trading partners.

While policy responses to the COVID-19 pandemic have varied across Latin America, countries more reliant on exports, such as Brazil, have seen their currencies depreciate from the start of the year. The Brazilian central bank has shown a continued willingness to cut benchmark interest rates and has more room available than other central banks. The continued slowdown and lower anticipated interest rates will cause further depreciation of the Brazilian real and other Latin American currencies. Argentina's economy, which contracted in FY 2019, is expected to remain in a recession as growing concerns about its debt obligations have created a gap between its official and unofficial exchange rates.

Both Russia and the Middle East face lost revenue from the fall in oil markets which saw Brent crude oil spot prices fall \$13 per barrel on average from March to April 2020, according to the U.S. Energy Information Administration (EIA). While oil prices are expected to recuperate from recent lows, in a world of slow or no economic growth and abundant oil inventories, any increase in prices will be modest. Per capita GDP growth rate for FY 2020 is forecast to be -7.1 percent in Russia and -8.5 percent in the Middle East and Northern Africa. Sub-Saharan Africa is expected to face a decline in demand for its export products, which will cause FY 2020 per capita GDP to decline by 3.0 percent from the prior year.

Table 2--Macroeconomic variables affecting U.S. agricultural exports 1/

Region/Country 3/	Real exchange rate 2/		Real GDP per capita growth rate				Share of World		Share of U.S.
	2019	2020	2019	2020	2019	2020	GDP	Population	Agricultural exports
	Percent change				Previous forecast		2016-18 average		
World	5.2	11.2	1.5	-5.5	1.5	1.5	100.0	100.0	100.0
North America	1.5	6.8	1.4	-7.3	1.4	0.7	27.7	6.5	28.4
United States	--	--	1.6	-7.1	1.6	1.1	24.1	4.3	--
Canada	2.4	2.7	0.2	-8.8	0.2	0.2	2.0	0.5	15.0
Mexico	0.3	17.8	-1.2	-9.6	-1.0	-0.3	1.6	1.7	13.5
Emerging markets	4.3	7.4	3.1	-2.6	4.6	4.4	24.1	45.0	16.0
Brazil	7.9	22.6	0.3	-6.9	0.3	1.0	2.2	2.8	0.5
Russia	3.2	6.5	1.2	-7.1	1.1	1.6	1.8	1.9	0.2
India	3.0	4.6	3.6	-2.1	3.9	4.6	3.2	17.8	1.1
Indonesia	-0.6	4.6	3.9	-1.7	3.9	4.0	1.2	3.5	2.1
China	4.5	3.0	5.7	0.4	5.7	5.2	15.8	18.9	12.1
Europe & Central Asia	0.1	3.4	1.8	-8.4	1.8	1.5	24.9	9.3	10.4
Euro Zone	-4.1	2.7	1.0	-8.5	1.0	0.8	15.4	4.5	7.0
Ukraine	-5.0	-2.1	3.8	-8.1	4.1	4.0	0.1	0.6	0.1
Turkey	17.7	10.3	-0.4	-7.0	-1.1	1.5	1.2	1.1	1.1
Asia & Oceania	3.1	3.6	3.6	-1.6	3.5	3.3	34.0	55.2	44.4
Japan	-1.2	0.4	1.0	-5.3	1.2	0.7	5.7	1.7	8.7
South Korea	5.8	4.4	1.9	-1.0	1.7	1.6	2.0	0.7	5.2
Australia	7.5	7.9	0.6	-7.3	0.5	0.7	1.6	0.3	1.0
Other Southeast Asia 4/	-0.7	3.7	3.6	-4.8	3.6	3.7	1.7	4.0	6.2
Latin America	18.2	22.8	-0.3	-6.8	-0.3	0.2	4.6	5.8	23.9
Argentina	72.0	70.3	-3.1	-7.8	-3.4	-2.5	0.8	0.6	0.3
Other South America 5/	8.2	7.1	0.9	-6.3	0.9	1.4	1.1	1.8	3.6
Middle East & North Africa	6.4	7.5	-1.3	-8.5	-1.0	0.0	4.2	6.5	5.9
Sub-Saharan Africa	7.4	16.3	0.1	-3.0	0.1	0.4	2.0	13.3	1.2

1/ Real values have a 2010 base year.

2/ Local currency per U.S. dollar. A negative growth rate indicates a depreciation of the dollar.

3/ World real exchange rate is a U.S. agricultural exports-weighted index.

4/ Includes Malaysia, Philippines, Thailand, and Vietnam.

5/ Includes Chile, Colombia, Peru, Bolivia, Paraguay, and Uruguay.

Source: Calculations and compilation by USDA, Economic Research Service using data and forecasts from Global Insight, IHS Markit, the International Monetary Fund, Oxford Economics.

Export Products

FY 2020 U.S. grain and feed exports are forecast at \$29.4 billion, down \$300 million from the February projection, as lower wheat and corn exports more than offset higher sorghum exports. Corn exports are forecast at \$8.0 billion, down \$500 million from the February forecast on lower unit values due to ample supplies available for export, expectations of record U.S. production in 2020, and weak domestic use for fuel ethanol. Sorghum exports are forecast at \$1.0 billion, \$500 million above what was forecast in February on larger volumes and higher unit values, supported by demand from China. Feed and fodder exports are forecast at \$7.8 billion, unchanged, as higher unit prices offset lower volumes. Wheat exports are forecast at \$6.1 billion, down \$300 million from February mainly on lower volumes due to larger global supplies and uncompetitive pricing. The rapid pace of exports from the European Union (EU) in recent months has constrained U.S. old-crop shipments. With 2020/21 global production forecast at a record high, new-crop shipments may face stiff competition, especially from Canada and Russia. Rice exports are forecast at \$2.0 billion, unchanged from the February projection, as higher unit values offset lower expected volumes.

The oilseeds and products export forecast is reduced \$1.6 billion to \$25.5 billion. Lower soybean export values reflect both lower volumes and lower unit prices. Soybean exports are forecast down \$1.9 billion from the February forecast, to \$16.5 billion. Forecast unit values are lowered from the previous forecast partly due to the impact of a weak Brazilian real as well as weaker than expected import demand for U.S. soybeans. The soybean meal export forecast is unchanged as declines in unit values are offset by higher volumes. Soybean oil values are up \$200 million with larger volumes more than offsetting lower unit values. Somewhat weaker global demand for vegetable oil in response to reduced biofuel demand arising from the impact of COVID-19 mitigation efforts has pressured unit values.

Cotton exports are forecast at \$5.2 billion, down \$1.0 billion from the February projection on lower volumes and unit values. The COVID-19 pandemic has reduced foreign demand for cotton as mills have dramatically cut operating rates, helping to drive forecast volumes down 8 percent. Global restrictions and changes in consumer behavior related to the pandemic have also slowed consumer purchases of cotton products, dampening demand and pressuring prices.

Livestock, poultry, and dairy exports are forecast unchanged from the February projection of \$32.4 billion as strengthened demand for pork and dairy products offsets a decline for beef and poultry products. Dairy exports are raised \$200 million to \$6.2 billion as U.S. dairy export volumes, particularly for dry milk powder, are expected to grow. U.S. dairy products are price

competitive, and global import demand remains strong. The pork forecast is raised \$200 million to \$6.9 billion as higher volumes offset a small decline in unit values. Strong demand from China continues to drive growth in U.S. pork exports. The beef forecast is lowered nearly \$300 million to \$7.2 billion as lower volumes are only partially offset by the higher prices associated with tighter domestic supplies. Poultry and poultry products are forecast \$100 million lower than was expected in February, to \$5.5 billion on reductions in volumes and values for broiler meat.

Horticultural product exports are forecast at \$35.5 billion, unchanged from the February projection. Whole and processed tree nuts are unchanged at \$9.1 billion, with most shipments destined for Europe and Asia. Fresh fruit and vegetables are unchanged at \$7.1 billion on stable shipments to top markets Canada and Mexico. Processed fruits and vegetables are unchanged at \$7.0 billion on steady shipments to Canada.

Table 3--U.S. agricultural exports: Value and volume by commodity, 2019 - 2020

Commodity	October - March		Fiscal year 2019	Forecast Fiscal year 2020	
	FY 2019	FY 2020		Feb.	May
VALUE					
---Billion dollars---					
Grains and feeds 1/	15.225	13.804	30.007	29.7	29.4
Wheat 2/	2.928	2.816	6.244	6.4	6.1
Rice	0.888	0.954	1.855	2.0	2.0
Coarse grains 3/	5.281	3.760	9.470	9.0	9.0
Corn	5.072	3.381	8.977	8.5	8.0
Feeds and fodders	3.801	3.911	7.787	7.8	7.8
Oilseeds and products 4/	14.287	15.393	25.828	27.1	25.5
Soybeans	9.624	10.567	16.949	18.4	16.5
Soybean meal 5/	2.415	2.322	4.464	4.3	4.3
Soybean oil	0.383	0.534	0.677	0.7	0.9
Livestock, poultry, and dairy	14.715	16.618	30.183	32.4	32.4
Livestock products	9.539	10.767	19.366	20.8	20.7
Beef and veal 6/	3.568	3.538	7.282	7.5	7.2
Pork 6/	2.601	3.730	5.518	6.7	6.9
Beef and pork variety meats 6/	0.756	0.880	1.562	1.7	1.7
Hides, skins, and furs	0.611	0.485	1.108	0.9	0.9
Poultry and products	2.453	2.635	5.142	5.6	5.5
Broiler meat 6/ 7/	1.470	1.656	3.179	3.7	3.6
Dairy products	2.723	3.217	5.675	6.0	6.2
Tobacco, unmanufactured	0.426	0.355	0.754	0.8	0.7
Cotton	2.831	3.030	6.070	6.2	5.2
Seeds	1.300	1.077	1.899	2.0	1.8
Horticultural products 8/	18.082	18.108	34.964	35.5	35.5
Fruits and vegetables, fresh	3.295	3.341	7.066	7.1	7.1
Fruits and vegetables, processed 8/	3.437	3.408	6.859	7.0	7.0
Tree nuts, whole and processed	5.377	5.438	8.997	9.1	9.1
Sugar and tropical products 9/	2.897	2.839	5.833	5.9	5.9
Major bulk products 10/	22.109	21.599	41.586	42.8	39.5
Total	69.767	71.228	135.544	139.5	136.5
VOLUME					
--- Million metric tons ---					
Wheat 2/	12.079	11.983	26.626	27.5	26.1
Rice	1.713	1.786	3.621	3.8	3.7
Coarse grains 3/	29.227	20.301	51.642	50.1	52.4
Corn	28.110	18.312	49.076	47.0	47.0
Feeds and fodders	10.337	10.217	21.578	21.8	21.3
Soybeans	27.464	29.169	48.118	49.7	45.6
Soybean meal 5/	6.542	6.619	12.296	12.0	12.2
Soybean oil	0.501	0.692	0.881	0.9	1.2
Beef and veal 6/	0.493	0.501	1.014	1.1	1.0
Pork 6/	1.005	1.346	2.057	2.4	2.5
Beef and pork variety meats 6/	0.345	0.383	0.728	0.8	0.8
Broiler meat 6/ 7/	1.630	1.695	3.221	3.3	3.3
Tobacco, unmanufactured	0.056	0.048	0.105	0.2	0.1
Cotton	1.540	1.865	3.423	3.6	3.3
Major bulk products 10/	72.078	65.152	133.536	134.9	131.2
Total may not add due to rounding.					

1/ Includes corn gluten feed and meal and processed grain products. 2/ Excludes wheat flour. 3/ Includes corn, barley, sorghum, oats, and rye. 4/ Excludes corn gluten feed and meal. 5/ Includes soy flours made from protein meals. 6/ Includes chilled, frozen, and processed meats. 7/ Includes only federally inspected product. 8/ Includes juices. 9/ Includes coffee and cocoa products, tea, and spices. 10/ Includes wheat, rice, coarse grains, soybeans, cotton, and unmanufactured tobacco.

Source: USDA, Economic Research Service and Foreign Agricultural Service analysis and forecasts using data from U.S. Department of Commerce, Bureau of the Census.

Regional Exports

Outlook for Fiscal Year 2020

Agricultural exports in FY 2020 are forecast at \$136.5 billion, \$3.0 billion lower than the February projection. Asia accounts for two-thirds of the reduction.

Asia

The export forecast for China is lowered \$1.0 billion from February to \$13.0 billion, in part due to lower forecast volumes and unit values for soybean and cotton. In addition, China has been sourcing record volumes of soybeans from Brazil, helped by a weak Brazilian real. Forecast exports to Hong Kong are reduced by \$500 million to \$2.5 billion due to lower-than-expected shipments of consumer-oriented products, especially tree nuts, beef, and poultry meat.

Exports to South Korea are lowered \$300 million from February to \$7.7 billion on lower-than-expected sales of bulk products, especially corn. The 2020 forecast for exports to Vietnam is reduced \$200 million to \$3.5 billion as a result of weak demand for cotton.

Western Hemisphere

The export forecast for Canada is reduced by \$300 million to \$21.2 billion, mainly due to sluggish sales of soybeans. The new projection still represents a 1-percent increase over the previous year. Forecast exports to Mexico are unchanged at \$19.8 billion, which represents a 4-percent increase from FY 2019, as strong exports of poultry, pork, and dairy more than offset lower corn and cotton shipments.

The export forecast for Central America is increased by \$400 million from February to \$4.4 billion, driven by stronger-than-expected shipments to date, especially for corn and consumer-oriented products to Honduras.

Europe, Africa, the Middle East, and Oceania

Exports to the EU are forecast at \$11.5 billion, which is \$800 million lower than the previous projection due to a reduction in demand for soybeans, soybean meal, and other feeds and fodders. With this change the EU is dropping below Japan (unchanged this quarter) as the fifth largest U.S. agricultural market.

The export forecast for the Middle East is cut by \$100 million to \$5.8 billion on account of weak demand for wheat in Iraq.

The export forecast for Africa is lowered \$100 million to \$4.3 billion, due to weaker-than-expected wheat sales to Nigeria.

Table 4--U.S. agricultural exports: Value by region, 2019-2020

Country and region 1/	October - March		Fiscal year 2019	Share of FY 2019 total Percent	Forecast	
	FY 2019	FY 2020			Fiscal year 2020	
	-- \$ Billion --				-- \$ Billion --	
					Feb.	May
VALUE						
Asia	27.446	30.444	54.746	40.4	58.6	56.6
East Asia	18.329	20.705	37.169	27.4	40.6	38.8
Japan	6.250	5.816	12.136	9.0	12.0	12.0
China	4.039	7.962	10.089	7.4	14.0	13.0
Hong Kong	2.060	1.369	3.513	2.6	3.0	2.5
Taiwan	1.867	1.797	3.608	2.7	3.6	3.6
South Korea	4.109	3.757	7.812	5.8	8.0	7.7
Southeast Asia	6.971	6.997	13.566	10.0	13.6	13.4
Indonesia	1.447	1.469	2.892	2.1	2.9	2.9
Philippines	1.419	1.455	2.879	2.1	3.0	3.0
Malaysia	0.558	0.594	1.146	0.8	1.3	1.3
Thailand	1.061	0.984	1.885	1.4	1.8	1.8
Vietnam	1.922	1.830	3.593	2.7	3.7	3.5
South Asia	2.146	2.741	4.011	3.0	4.4	4.4
India	0.768	0.864	1.795	1.3	1.8	1.8
Western Hemisphere	27.698	27.677	55.021	40.6	55.0	55.1
North America	19.658	20.162	39.895	29.4	41.3	41.0
Canada	10.233	10.269	20.899	15.4	21.5	21.2
Mexico	9.424	9.894	18.996	14.0	19.8	19.8
Caribbean	1.846	1.838	3.677	2.7	3.6	3.6
Dominican Republic	0.695	0.708	1.297	1.0	1.3	1.3
Central America	2.146	2.259	4.384	3.2	4.0	4.4
South America	4.049	3.417	7.064	5.2	6.1	6.1
Brazil	0.289	0.307	0.583	0.4	0.6	0.6
Colombia	1.417	1.559	2.678	2.0	2.7	2.7
Peru	0.641	0.425	1.033	0.8	0.8	0.8
Venezuela	0.105	0.157	0.174	0.1	0.2	0.2
Europe/Eurasia	8.238	6.835	13.787	10.2	13.4	12.6
European Union-27+UK 2/	7.576	6.380	12.603	9.3	12.3	11.5
Other Europe 3/	0.261	0.200	0.572	0.4	0.6	0.6
FSU-12 4/	0.401	0.255	0.611	0.5	0.5	0.5
Russia	0.139	0.092	0.219	0.2	0.2	0.2
Middle East	3.203	2.985	5.773	4.3	5.9	5.8
Turkey	0.535	0.678	1.182	0.9	1.5	1.5
Saudi Arabia	0.737	0.687	1.316	1.0	1.3	1.3
Africa	2.142	2.228	4.080	3.0	4.4	4.3
North Africa	1.231	1.377	2.124	1.6	2.4	2.4
Egypt	0.901	0.941	1.477	1.1	1.5	1.5
Sub-Saharan Africa	0.911	0.851	1.956	1.4	2.0	1.9
Nigeria	0.218	0.227	0.552	0.4	0.7	0.6
Oceania	0.173	0.182	2.138	1.6	2.1	2.1
Transshipments via Canada 5/	0.000	0.000	0.000	0.0	0.0	0.0
Total	69.767	71.228	135.544	100.0	139.5	136.5

Total may not add due to rounding.

1/ Projections are based primarily on trend or recent average growth analysis.

2/ 28 member nations of the European Union (EU) including the United Kingdom (UK), which will remain in the EU Customs Union during the transition period that is scheduled to end December 31, 2020, but may be extended.

3/ Major countries include Switzerland, Norway, Iceland, and former Yugoslav states.

4/ The 15 Republics of the Former Soviet Union (FSU) minus the 3 Baltic Republics.

5/ Transshipments through Canada have not been allocated to final destination, but are included in the total.

Source: USDA, Economic Research Service and Foreign Agricultural Service analysis and forecasts using data from U.S. Department of Commerce, Bureau of the Census.

Import Products

Agricultural imports in FY 2020 are forecast to decrease to \$130.2 billion, \$2.3 billion less than the February forecast and \$700 million less than the total value of imports in FY 2019. The expected decreases in imports of horticultural products and oilseeds outweigh the expected increase in imports of sugar and tropical products from the February forecast.

FY 2020 horticultural product imports, at \$64.4 billion, are expected to be \$1.9 billion less than the February forecast, and about \$1.8 billion below the FY 2019 total. The beer import forecast is reduced by \$700 million as a result of Mexican breweries shutting down production during the pandemic. The forecast for wine imports is reduced \$400 million from the previous forecast as a result of reduced demand as consumers shift from dining out to staying at home during the pandemic. The forecasts for imports of fresh fruit and vegetables are reduced by \$500 million and \$200 million, respectively, as these perishable products are vulnerable to spoilage when there are delays in the supply chain, which are expected due to precautionary steps having been added to the production and transportation processes and reductions in the availability of labor. Imports of fruit juices are forecast to be \$1.9 billion in FY 2020, a \$200 million reduction from the February forecast, and about \$300 million less than FY 2019 due to reduced import volumes.

U.S. imports of sugar and tropical products are forecast to reach \$23.5 billion in FY 2020, a \$100 million upward adjustment from the previous forecast and \$400 million above FY 2019. Imports of sweeteners and products are forecast at \$4.9 billion, representing a \$100 million increase from the previous forecast, because of continued increases in quantities imported of products such as confections.

The FY 2020 livestock, dairy, and poultry import forecast remains unchanged from the February forecast at \$17.6 billion. The forecast for beef and veal imports is increased by \$300 million resulting from higher unit values for those products. The dairy product import forecast is increased by \$100 million compared with the previous forecast due to increased import volumes in the second quarter of the fiscal year. Projected pork imports are decreased by \$100 million compared to the previous forecast as a result of decreased demand. Reductions in unit value contribute to a \$200 million decrease in the forecast for live cattle and calf imports.

The import forecast for oilseeds and oilseed product is reduced by \$400 million from the previous forecast to \$9.1 billion, due to decreases in the volumes of vegetable oils imported compared with FY 2019. The forecast for total grain and feed imports for FY 2020 is expected to remain unchanged.

Table 5--U.S. agricultural imports: Value and volume by commodity, 2019-2020

Commodity	October - March		Fiscal year 2019	Forecast Fiscal year 2020	
	FY2019	FY2020		Feb.	May
	VALUE				
---Billion dollars---					
Livestock, dairy, and poultry	8.700	9.051	17.789	17.6	17.6
Livestock and meats	6.576	6.854	13.281	13.2	13.1
Cattle and calves	0.950	0.962	1.750	1.8	1.6
Swine	0.156	0.153	0.312	0.3	0.3
Beef and veal	2.675	3.050	5.798	5.8	6.1
Pork	0.802	0.728	1.561	1.5	1.4
Dairy products	1.721	1.811	3.695	3.6	3.7
Cheese	0.659	0.633	1.348	1.3	1.3
Grains and feed	6.689	6.923	13.375	13.9	13.9
Grain products	4.639	4.794	9.378	9.7	9.7
Oilseeds and products	4.405	4.476	8.796	9.5	9.1
Vegetable oils	2.784	2.773	5.546	6.4	6.0
Horticulture products	33.215	34.081	66.192	66.3	64.4
Fruits, fresh	7.216	7.736	13.957	15.3	14.8
Fruits, processed	2.895	2.706	5.749	5.9	5.9
Fruit juices	1.167	0.954	2.193	2.1	1.9
Nuts, whole and processed	1.648	1.496	3.141	3.3	3.3
Vegetables, fresh	5.009	5.428	8.932	8.5	8.3
Vegetables, processed	2.714	2.842	5.429	5.5	5.5
Wine	3.170	3.256	6.591	6.5	6.1
Malt beer	2.447	2.617	5.507	5.8	5.1
Essential oils	2.017	1.951	4.199	4.1	4.1
Cut flowers and nursery stock	1.112	1.131	2.175	2.1	2.1
Sugar and tropical products	11.208	11.252	23.092	23.4	23.5
Sweeteners and products	2.253	2.388	4.539	4.8	4.9
Confections	0.928	0.967	1.924	1.8	1.9
Cocoa and products	2.385	2.580	4.808	4.9	4.9
Coffee and products	2.928	2.864	6.162	6.1	6.1
Rubber, natural	0.730	0.713	1.513	1.5	1.5
Other imports 1/	0.917	0.855	1.744	1.7	1.7
Total agricultural imports	65.133	66.638	130.943	132.5	130.2
VOLUME					
---Million metric tons---					
Wine 2/	0.654	1.305	1.325	1.4	1.3
Malt beer 2/	1.906	1.960	4.215	4.3	3.8
Fruit juices 2/	2.643	1.127	4.833	5.1	4.6
Cattle and calves 3/	1.138	1.113	2.031	2.1	2.1
Swine 3/	2.625	2.637	5.081	5.0	5.0
Beef and veal	0.477	0.328	1.020	1.0	1.0
Pork	0.222	0.101	0.421	0.4	0.4
Fruits, fresh	6.136	6.195	12.519	13.0	12.6
Fruits, processed	0.942	0.929	1.897	2.0	2.0
Vegetables, fresh	4.451	4.567	8.025	8.1	7.9
Vegetables, processed	2.054	2.130	4.124	4.2	4.2
Vegetable oils	2.415	2.620	4.901	5.3	5.0
Cocoa and products	0.699	0.442	1.381	1.4	1.4
Coffee and products	0.848	0.429	1.787	1.7	1.7

Totals may not add due to rounding.

1/ Largely tobacco and planting seeds. 2/ Billion liters. 3/ Million head.

Source: USDA, Economic Research Service and Foreign Agricultural Service analysis and forecasts using data from U.S. Department of Commerce, Bureau of the Census.

Regional Imports

Outlook for FY 2020

The FY 2020 forecast of agricultural imports currently stands at \$130.2 billion, \$2.3 billion less than the February forecast and \$700 million less than the total value of imports in FY 2019. The expected decreases in imports from the Americas and Europe outweigh the expected increase in imports from Oceania from the February forecast.

Western Hemisphere

The forecast regional imports from the Western Hemisphere is decreased \$2.1 billion from the previous forecast. Mexico's projected sales total is decreased by \$1.3 billion from the February forecast to \$27.0 billion as slowing imports of beer, fresh produce, and juice, combined with a depreciating currency, are expected to outweigh potential increases in imports of sugar and tropical products. The projected value of U.S. agricultural imports from Canada is lowered by \$300 million to \$22.9 billion, as downward adjustments to U.S. imports of cattle and calves and oilseed products outweigh upward adjustments of dairy products.

Imports from Central and South America are forecast down \$200 million and \$300 million respectively from the previous forecast to \$5.4 billion and \$14.4 billion respectively. Imports from Costa Rica, Guatemala, Chile, and Peru are each expected to be \$100 million less than was forecast for FY 2020 in February due to expected disruptions to labor supply and supply chain logistics impacting fresh fruit trade mentioned previously in this report. Imports from Brazil are expected to be \$100 million less than the previous forecast largely due to reductions in fruit juice imports.

Oceania

U.S. imports from Oceania are expected to rise \$300 million in FY 2020. Projected imports from Australia are increased by \$300 million due to increases in the projected unit value of beef and other meat products.

Europe

Forecast imports from the EU for FY 2020 are adjusted downward by \$500 million from the February forecast to \$24.4 billion. This reflects expected reductions in the supply of wine due to reduced demand resulting from the pandemic and reduced imports of pork and oilseed products.

Asia, Africa, and the Middle East

Imports from Asia, Africa, and the Middle East are unchanged from the previous forecast.

Table 6--U.S. agricultural imports: Value by region, fiscal years 2019-20

Region and country	October - March		Fiscal year 2019	Forecast	
	FY2019	FY2020		Fiscal year 2020	
				Feb.	May
VALUE					
---Billion dollars---					
Western Hemisphere	36.325	38.110	71.796	72.5	70.4
Canada	11.365	11.896	23.412	23.2	22.9
Mexico	14.340	15.324	27.899	28.3	27.0
Central America	2.507	2.734	5.431	5.6	5.4
Costa Rica	0.679	0.725	1.515	1.6	1.5
Guatemala	1.054	1.103	2.131	2.2	2.1
Other Central America	0.774	0.906	1.785	1.8	1.8
Caribbean	0.326	0.317	0.662	0.7	0.7
South America	7.787	7.839	14.393	14.7	14.4
Argentina	0.698	0.716	1.357	1.4	1.4
Brazil	1.740	1.649	3.327	3.4	3.3
Chile	1.590	1.517	2.874	3.0	2.9
Colombia	1.457	1.398	2.704	2.7	2.7
Peru	1.419	1.650	2.439	2.5	2.4
Other South America	0.883	0.909	1.691	1.7	1.7
Europe and Eurasia	12.598	12.607	26.550	26.7	26.2
European Union-27+UK 1/	11.828	11.783	24.695	24.9	24.4
Other Europe	0.770	0.824	1.855	1.8	1.8
Asia	10.856	10.419	22.088	22.7	22.7
East Asia	3.152	2.703	6.053	6.2	6.2
China	2.168	1.654	4.072	4.4	4.4
Other East Asia	0.984	1.049	1.982	1.8	1.8
Southeast Asia	6.191	6.281	12.994	13.5	13.5
Indonesia	1.522	1.590	2.980	3.3	3.3
Malaysia	0.478	0.493	1.031	1.0	1.0
Thailand	1.358	1.428	2.827	2.8	2.8
Vietnam	0.955	0.955	2.031	2.4	2.4
Other Southeast Asia	1.878	1.815	4.125	4.0	4.0
South Asia	1.513	1.435	3.040	3.0	3.0
India	1.329	1.261	2.682	2.7	2.7
Oceania	2.733	2.989	5.902	6.0	6.3
Australia	1.620	1.782	3.425	3.4	3.7
New Zealand	1.048	1.150	2.368	2.6	2.6
Africa	1.640	1.602	3.124	3.0	3.0
Sub-Saharan	1.382	1.328	2.638	2.7	2.7
Ivory Coast	0.416	0.490	0.752	0.9	0.9
Middle East	0.841	0.767	1.484	1.6	1.6
Turkey	0.569	0.493	0.975	1.0	1.0
World total	65.133	66.638	130.943	132.5	130.2

Totals may not add due to rounding.

1/ 28 member nations of the European Union (EU) including the United Kingdom (UK), which will remain in the EU Customs Union during the transition period that is scheduled to end December 31, 2020, but may be extended.

Source: USDA, Economic Research Service and Foreign Agricultural Service analysis and forecasts using data from U.S. Department of Commerce, Bureau of the Census.

Reliability Tables

Table 7--Reliability of quarterly U.S. export projections, by commodity and quarter

Commodity	Average absolute forecast errors					Forecast accuracy					Forecast accuracy 1/
	Fiscal 2019					Fiscal 2019					
	Aug.	Nov.	Feb.	May	Aug.	Aug.	Nov.	Feb.	May	Aug.	
Export value	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					<i>Percent</i>
Grains and feeds	13	15	15	5	2	-	-	-	-	X	20
Wheat	14	20	20	1	1	-	-	-	X	X	40
Rice	3	8	8	7	3	X	-	-	-	X	40
Coarse grains	27	31	30	14	2	-	-	-	-	X	20
Corn	25	31	31	16	2	-	-	-	-	X	20
Feeds and fodders	1	1	1	1	1	X	X	X	X	X	100
Oilseeds and products	17	8	8	2	2	-	-	-	X	X	40
Soybeans	24	10	9	0	4	-	-	-	X	X	40
Soybean meal	1	1	3	2	0	X	X	X	X	X	100
Soybean oil	18	18	18	8	7	-	-	-	-	-	0
Livestock, poultry, and dairy	0	0	1	1	1	X	X	X	X	X	100
Livestock products	0	1	1	2	1	X	X	X	X	X	100
Beef and veal	3	4	6	2	3	X	X	-	X	X	80
Pork	8	6	2	4	1	-	-	X	X	X	60
Beef and pork variety meats	4	4	4	6	1	X	X	X	-	X	80
Hides, skins, and furs	44	35	8	12	15	-	-	-	-	-	0
Poultry and products	3	1	3	4	2	X	X	X	X	X	100
Broiler meat	4	1	4	2	2	X	X	X	X	X	100
Dairy products	1	7	5	1	1	X	-	X	X	X	80
Tobacco, unmanufactured	33	33	33	33	6	-	-	-	-	-	0
Cotton	14	3	3	6	6	-	X	X	-	-	40
Planting seeds	5	5	5	5	5	-	-	-	-	-	0
Horticultural products	1	1	1	1	0	X	X	X	X	X	100
Fruits and vegetables, fresh	5	5	5	5	0	X	X	X	X	X	100
Fruits and veget., processed	5	5	5	5	1	X	X	X	X	X	100
Tree nuts	1	1	1	1	1	X	X	X	X	X	100
Sugar and tropical products	1	1	1	1	1	X	X	X	X	X	100
Major bulk products	41	33	32	20	14	-	-	-	-	-	0
Total agricultural exports	7	4	4	1	1	-	X	X	X	X	80
Root mean square error	17	15	14	9	5	52%	52%	55%	62%	79%	60
Export volume											
Wheat	5	15	12	2	1	X	-	-	X	X	60
Rice	1	6	6	6	3	X	-	-	-	X	40
Coarse grains	23	26	26	17	3	-	-	-	-	X	20
Corn	20	26	26	18	4	-	-	-	-	X	20
Feeds and fodders	2	2	2	2	2	X	X	X	X	X	100
Soybeans	17	7	6	0	3	-	-	-	X	X	40
Soybean meal	2	2	2	2	0	X	X	X	X	X	100
Soybean oil	14	14	14	14	2	-	-	-	-	X	20
Beef and veal	9	9	9	4	2	-	-	-	X	X	40
Pork	2	2	2	2	0	X	X	X	X	X	100
Beef and pork variety meats	4	4	4	9	3	X	X	X	-	X	80
Broiler meat	1	1	2	1	1	X	X	X	X	X	100
Tobacco, unmanufactured	91	91	91	91	4	-	-	-	-	X	20
Cotton	2	4	4	7	7	X	X	X	-	-	60
Major bulk products	16	15	14	6	0	-	-	-	-	X	20
Root mean square error	26	27	26	25	3	53%	40%	40%	47%	93%	55

1/ Percent of forecasts with errors less than or equal to 5 percent, as denoted by an X.

Source: USDA, Economic Research Service and USDA, Foreign Agricultural Service.

Table 8--Reliability of quarterly U.S. export projections, by country and quarter

Country/region	Average absolute forecast errors					Forecast accuracy					Forecast accuracy 1/ Percent
	Fiscal 2019					Fiscal 2019					
	Aug.	Nov.	Feb.	May	Aug.	Aug.	Nov.	Feb.	May	Aug.	
Export value	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					
Asia	10	6	6	2	4	-	-	-	X	X	40
East Asia	9	3	3	6	4	-	X	X	-	X	60
Japan	2	4	4	4	4	X	X	X	X	X	100
China	19	11	11	36	28	-	-	-	-	-	0
Hong Kong	31	31	31	8	2	-	-	-	-	X	20
Taiwan	3	5	5	5	5	X	-	-	-	-	20
South Korea	1	5	8	8	5	X	X	-	-	X	60
Southeast Asia	12	12	11	7	1	-	-	-	-	X	20
Indonesia	21	21	21	14	0	-	-	-	-	X	20
Philippines	4	4	4	4	4	X	X	X	X	X	100
Malaysia	13	13	13	13	13	-	-	-	-	-	0
Thailand	38	38	27	11	1	-	-	-	-	X	20
Vietnam	17	17	17	17	3	-	-	-	-	X	20
South Asia	10	10	10	5	3	-	-	-	X	X	40
India	5	5	5	16	16	-	-	-	-	-	0
Western Hemisphere	1	1	1	1	0	X	X	X	X	X	100
North America	3	3	3	3	1	X	X	X	X	X	100
Canada	3	3	3	3	1	X	X	X	X	X	100
Mexico	4	4	4	4	2	X	X	X	X	X	100
Caribbean	5	5	2	2	2	X	X	X	X	X	100
Dominican Republic	7	7	0	0	0	-	-	X	X	X	60
Central America	9	9	9	9	9	-	-	-	-	-	0
South America	4	4	4	5	1	X	X	X	-	X	80
Brazil	3	3	3	3	3	X	X	X	X	X	100
Colombia	12	12	12	12	5	-	-	-	-	X	20
Peru	26	26	26	26	7	-	-	-	-	-	0
Venezuela	73	73	73	15	15	-	-	-	-	-	0
Europe and Eurasia	6	6	6	7	6	-	-	-	-	-	0
European Union-27+UK 2/	6	6	6	6	6	-	-	-	-	-	0
Other Europe	22	22	22	22	5	-	-	-	-	X	20
FSU-12 3/	18	18	18	2	2	-	-	-	X	X	40
Russia	8	8	8	37	37	-	-	-	-	-	0
Middle East	4	4	4	4	2	X	X	X	X	X	100
Turkey	27	27	27	27	18	-	-	-	-	-	0
Saudi Arabia	6	6	6	6	6	-	-	-	-	-	0
Africa	32	32	32	23	10	-	-	-	-	-	0
North Africa	69	69	69	51	22	-	-	-	-	-	0
Egypt	56	56	56	56	15	-	-	-	-	-	0
Sub-Saharan Africa	8	8	8	8	3	-	-	-	-	X	20
Nigeria	9	9	9	9	9	-	-	-	-	-	0
Oceania	2	2	2	2	2	X	X	X	X	X	100
Root mean square error	23	23	22	18	11	32%	32%	32%	34%	61%	38

1/ Percent of forecasts with errors less than or equal to 5 percent, as denoted by an X.

2/ 28 member nations of the European Union including the United Kingdom (UK), which will remain in the European Union Customs Union during the transition period that is scheduled to end December 31, 2020, but may be extended.

3/ The 15 Republics of the Former Soviet Union (FSU) minus the 3 Baltic Republics.

Source: USDA, Economic Research Service and USDA, Foreign Agricultural Service.

Table 9--Reliability of quarterly U.S. import projections, by commodity and quarter

Commodity	Average absolute forecast errors Fiscal 2019					Forecast accuracy Fiscal 2019					Forecast accuracy 1/
	Aug.	Nov.	Feb.	May	Aug.	Aug.	Nov.	Feb.	May	Aug.	
Import value	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					<i>Percent</i>
Livestock, poultry, and dairy	3	4	4	3	0	X	X	X	X	X	100
Livestock and meats	1	4	3	2	0	X	X	X	X	X	100
Cattle and calves	9	9	3	3	3	-	-	X	X	X	60
Swine	4	4	4	4	4	X	X	X	X	X	100
Beef and veal	2	7	7	3	2	X	-	-	X	X	60
Pork	9	3	9	3	3	-	X	-	X	X	60
Dairy products	11	8	8	8	3	-	-	-	-	X	20
Cheese	4	4	4	11	4	X	X	X	-	X	80
Grains and feed	7	7	4	4	1	-	-	X	X	X	60
Grain products	9	9	6	6	4	-	-	-	-	X	20
Oilseeds and products	11	10	9	7	2	-	-	-	-	X	20
Vegetable oils	21	19	15	14	6	-	-	-	-	-	0
Horticulture products	7	6	5	3	2	-	-	X	X	X	60
Fruits, fresh	5	6	2	1	1	-	-	X	X	X	60
Fruits, preserved	4	3	1	1	1	X	X	X	X	X	100
Fruit juices	4	0	0	0	0	X	X	X	X	X	100
Nuts and preparations	8	8	11	11	11	-	-	-	-	-	0
Vegetables, fresh	7	7	6	5	5	-	-	-	X	X	40
Vegetables, processed	1	1	1	1	1	X	X	X	X	X	100
Wine	0	0	1	1	1	X	X	X	X	X	100
Malt beer	0	2	2	2	2	X	X	X	X	X	100
Essential oils	2	0	0	0	0	X	X	X	X	X	100
Cut flowers and nursery stock	8	8	8	8	8	-	-	-	-	-	0
Sugar and tropical products	2	3	2	1	0	X	X	X	X	X	100
Sweeteners and products	6	8	8	6	1	-	-	-	-	X	20
Confections	6	1	1	1	1	-	X	X	X	X	80
Cocoa and products	0	0	2	2	0	X	X	X	X	X	100
Coffee beans and products	7	7	5	5	1	-	-	-	-	X	20
Natural rubber	12	12	12	6	6	-	-	-	-	-	0
Other imports	3	3	3	3	3	X	X	X	X	X	100
Total agricultural imports	3	3	2	2	1	X	X	X	X	X	100
Root mean square error	7	7	6	5	4	48%	52%	61%	68%	87%	63
Import volume											
Wine	6	6	6	6	2	-	-	-	-	X	20
Malt beer	3	0	0	0	0	X	X	X	X	X	100
Fruit juices	6	8	8	8	6	-	-	-	-	-	0
Cattle and calves	2	2	2	2	3	X	X	X	X	X	100
Swine	6	4	2	4	0	-	X	X	X	X	80
Beef and veal	2	2	2	2	2	X	X	X	X	X	100
Pork	19	19	19	5	5	-	-	-	-	-	0
Fruits--fresh	1	1	1	1	0	X	X	X	X	X	100
Fruits--processed	5	0	0	0	0	-	X	X	X	X	80
Vegetables--fresh	2	2	2	0	0	X	X	X	X	X	100
Vegetables--processed	1	1	1	2	2	X	X	X	X	X	100
Vegetable oils	16	12	12	10	2	-	-	-	-	X	20
Cocoa and products	6	6	6	6	6	-	-	-	-	-	0
Coffee beans and products	16	16	16	16	10	-	-	-	-	-	0
Root mean square error	9	8	8	6	4	43%	57%	57%	57%	71%	57

1/ Percent of forecasts with errors less than or equal to 5 percent, as denoted by an X.

Source: USDA, Economic Research Service and USDA, Foreign Agricultural Service.

Table 10--Reliability of quarterly U.S. import projections, by country and quarter

Country/region	Average absolute forecast errors Fiscal 2019					Forecast accuracy Fiscal 2019					Forecast accuracy 1/
	Aug.	Nov.	Feb.	May	Aug.	Aug.	Nov.	Feb.	May	Aug.	
Import value	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					<i>Percent</i>
Western Hemisphere	3	2	1	1	1	X	X	X	X	X	100
Canada	0	1	1	1	1	X	X	X	X	X	100
Mexico	9	8	7	6	3	-	-	-	-	X	20
Central America	1	1	3	3	1	X	X	X	X	X	100
Costa Rica	12	12	12	12	6	-	-	-	-	-	0
Guatemala	1	1	3	3	3	X	X	X	X	X	100
Other Central America	5	5	5	5	1	X	X	X	X	X	100
Caribbean	9	6	6	21	21	-	-	-	-	-	0
South America	1	1	1	0	0	X	X	X	X	X	100
Argentina	3	3	3	4	4	-	X	X	X	X	80
Brazil	5	5	5	5	2	-	-	-	-	X	20
Chile	4	4	8	8	4	X	X	-	-	X	60
Colombia	4	4	4	5	5	X	X	X	X	X	100
Peru	10	14	14	11	6	-	-	-	-	-	0
Other South America	5	5	5	1	1	-	-	-	X	X	40
Europe and Eurasia	5	5	4	4	4	X	X	X	X	X	100
European Union-27+UK 2/	4	4	3	3	2	X	X	X	X	X	100
Other Europe	19	19	19	17	17	-	-	-	-	-	0
Asia	3	4	4	1	1	X	X	X	X	X	100
East Asia	6	6	7	7	2	-	-	-	-	X	20
China	13	15	15	13	6	-	-	-	-	-	0
Other East Asia	9	9	9	4	4	-	-	-	X	X	40
Southeast Asia	7	8	8	1	0	-	-	-	X	X	40
Indonesia	21	21	21	17	4	-	-	-	-	X	20
Malaysia	3	3	3	3	3	-	X	X	X	X	80
Thailand	12	12	12	7	5	-	-	-	-	X	20
Vietnam	23	23	23	17	8	-	-	-	-	-	0
Other Southeast Asia	44	49	49	20	3	-	-	-	-	X	20
South Asia	5	5	5	1	1	X	X	X	X	X	100
India	3	3	3	1	1	X	X	X	X	X	100
Oceania	3	3	3	1	1	X	X	X	X	X	100
Australia	1	1	1	1	2	X	X	X	X	X	100
New Zealand	14	14	14	6	6	-	-	-	-	-	0
Africa	4	7	7	7	4	X	-	-	-	X	40
Sub-Saharan Africa	1	5	5	5	5	X	-	-	-	-	20
Ivory Coast	46	33	33	13	6	-	-	-	-	-	0
Middle East	1	1	1	0	0	X	X	X	X	X	100
Turkey	3	3	3	1	1	X	X	X	X	X	100
Root mean square error	13	13	13	9	6	50%	50%	47%	55%	76%	56

1/ Percent of forecasts with errors less than or equal to 5 percent, as denoted by an X.

2/ 28 member nations of the European Union including the United Kingdom (UK), which will remain in the European Union Customs Union during the transition period that is scheduled to end December 31, 2020, but may be extended.

Source: USDA, Economic Research Service and USDA, Foreign Agricultural Service.

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