



Agricultural Refrigerated Truck Quarterly



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QUARTERLY OVERVIEW

CONTENTS

Fruit and Vegetable Shipments

Reported U.S. truck shipments of fresh produce during the third quarter of 2018 were 8.35 million tons, 13 percent lower than the previous quarter, but 0.2 percent higher than the same quarter last year.

Shipments from California were the highest in the third quarter, totaling 3.19 million tons and accounting for 38 percent of the total reported shipments of fresh fruits and vegetables. Shipments from the Pacific Northwest totaled 1.55 million tons, representing 19 percent of the reported shipments. Movements from Mexico totaled 1.49 million tons, representing 18 percent of the reported total.

The following top five commodities accounted for 44 percent of the reported truck movements during the third quarter of 2018:

- Potatoes (13 percent)
- Watermelons, seedless (12 percent)
- Apples (7 percent)
- Onions, dry (6 percent)
- Grapes (4 percent)

Truck Rates

The table below provides a snapshot of quarterly truck rates for U.S. produce shipments over four mileage categories—0-500, 501-1,500, 1,501-2,500, and 2,501+ miles. Please note the U.S. average truck rates provided below are calculated using weighted regional rates and volumes.

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U.S. Average Fruit and Vegetable Truck Rates per Mile

	0-500 miles	501-1,500 miles	1,501-2,500 miles	2,501+ miles
Q3 2017	5.06	2.52	2.25	1.26
Q4 2017	3.16	2.55	2.52	1.22
Q1 2018	3.05	2.64	2.54	1.04
Q2 2018	4.32	2.96	2.45	1.06
Q3 2018	5.32	2.85	2.57	1.56
Q3 Change from Previous Quarter	23%	-4%	5%	46%
Q3 Change from Same Quarter Last Year	5%	13%	14%	23%

Source: Agricultural Marketing Service, Specialty Crops Program, Market News Division

Diesel Fuel

During the third quarter 2018, the U.S. diesel fuel price averaged \$3.238 per gallon—1 percent higher than the previous quarter and 23 percent higher than the same quarter last year (see figure 2).

REGULATORY NEWS AND UPDATES

Ten Applications for Exemption from the Electronic Logging Device Rule Denied

On December 7, 2018, the Federal Motor Carrier Safety Administration (FMCSA) [announced](#) the denial of 10 applications for exemptions from the hours of service electronic logging device rule, stating it “has concluded that each application lacks sufficient merit to justify the exemptions sought.” FMCSA reviewed any safety analyses and public comments submitted and [determined](#) whether granting the exemption would likely achieve a level of safety equivalent to, or greater than, the level that would be achieved by the current regulation. The applicants included associations that represent retailers and distributors of farm-related products and services, agricultural equipment dealers, and small business trucking companies, including those that haul fresh produce.

Renewing the National Commitment to the Interstate Highway System: A Foundation for the Future

On December 6, 2018, the Transportation Research Board (TRB) [released](#) the Congressionally-mandated study, *Renewing the National Commitment to the Interstate Highway System: A Foundation for the Future*, with 10 recommendations. TRB said, “These include as a near-term step: (1) increase the federal motor fuel tax to a level commensurate with the federal share of the required Renewal and Modernization Program investment, and (2) adjust the tax as needed to account for inflation and changes in vehicle fuel economy.” The study also recommends Congress “prepare for the need to employ new federal and state funding mechanisms, such as the imposition of tolls or per-mile charges on users of the Interstate Highway System.”

Guide for Drivers on Electronic Logging Device Data Transfer Announced

On December 4, 2018, FMCSA, announced [Using ELDs: A Guide for Drivers](#), which “Gives the driver a high-level overview of the various data transfer processes and includes some tips on troubleshooting common questions that could arise during data transfer.” The information provided in the guide could be useful background for drivers if they ever experience a request by a safety official to review the driver’s electronic logging device data for potential hours of service violations.

Update on Pilot for 18-21-Year-Old Ex-Military Drivers to Operate Vehicles in Interstate Commerce

On November 27, 2018, FMCSA [announced](#) its plan to submit an Information Collection Request to the Office of Management and Budget for review and approval. It will request permission for the 3-year pilot program to allow a limited number of individuals, ages 18 to 20, to operate commercial motor vehicles (CMVs) in interstate commerce, if they received specified heavy-vehicle driver



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training while in military service and were hired by a participating motor carrier. On July 6, 2018, FMCSA [published](#) the details and FMCSA's responses to comments on the pilot program. In a separate July 6, 2018, [notice](#), FMCSA asked for comments on the information to be collected during the pilot program. U.S. Secretary of Transportation Elaine L. Chao [said](#), "This program will allow our Veterans and Reservists, to translate their extensive training into good-paying jobs, operating commercial vehicles safely across the country, while also addressing the nationwide driver shortage." Documents and comments are available in Docket No. [FMCSA-2017-0196](#) for the information collection, and Docket No. [FMCSA-2016-0069](#) for the pilot program.

Research Plan to Improve Estimates of Impacts of Changes in Truck Size and Weight Regulations

On November 27, 2018, the Transportation Research Board's Truck Size and Weight Limits Research Plan Committee [announced](#) it "has issued its second and final report to the U.S. Department of Transportation. The report presents a research plan to reduce the major sources of uncertainty in projections of the consequences of proposed changes in truck size and weight limits. The report defines a program of 27 coordinated research projects in six areas. The committee issued its [first report in April 2018](#), which summarized the research recommendations of past truck size and weight limit studies and identified criteria for deciding the priority of topics for inclusion in the research plan."

California Air Resources Board Increases Tracking of Vehicle Emissions

On November 15, 2018, the California Air Resources Board announced it had "[adopted](#) a new emissions tracking program that will help regulators identify vehicles with excess smog-related and greenhouse gas emissions and propel California further towards its goal of meeting state and federal air quality standards in the decades ahead. Real Emissions Assessment Logging (REAL) is part of the amendments to the OBD (On-board Diagnostic) Regulations approved by the Board. The REAL program will require no new technology since it will take advantage of existing sensors to track the necessary data. Older vehicles will not be part of the REAL program and will not require any new equipment."

EPA Acting Administrator Wheeler Launches Cleaner Trucks Initiative

On November 13, 2018, "U.S. Environmental Protection Agency (EPA) Acting Administrator Andrew Wheeler [launched](#) the Cleaner Trucks Initiative (CTI) to further decrease nitrogen oxide (NOx) emissions from on-highway heavy-duty trucks and engines. He was joined by EPA Office of Air and Radiation Assistant Administrator Bill Wehrum, White House officials, state partners, labor representatives, and leaders from the trucking and engine manufacturing industry. The CTI will include a future rulemaking that will update the existing NOx standard which was last set in 2001 while also streamlining compliance and certification requirements."

Personal Conveyance Frequently Asked Questions and Guidance Updated

In November 2018, the Federal Motor Carrier Safety Administration (FMCSA) published [Personal Conveyance Frequently Asked Questions](#). FMCSA states, "personal conveyance is the movement of a commercial motor vehicle (CMV) for personal use while off-duty. A driver may record time operating a CMV for personal conveyance as off-duty only when the driver is relieved from work and all responsibility for performing work by the motor carrier. The CMV may be used for personal conveyance even if it is laden, since the load is not being transported for the commercial benefit of the motor carrier at that time. Personal conveyance does not reduce a driver's or motor carrier's responsibility to operate a CMV safely. Motor carriers can establish personal conveyance limitations either within the scope of, or more restrictive than, the [guidance](#) provided."

Periodic Update of the Jason's Law Survey on Truck Parking Underway

In November 2018, the Federal Highway Administration began the [required](#) periodic survey of States to inventory public rest areas and the periodic surveys of [commercial motor vehicle operators \(drivers\)](#), [trucking operations managers](#), and [truck stop owners and operators](#) to "improve [truck parking](#) and provide States and metropolitan planning organizations with resources to identify parking needs and to encourage improvements and investments." Under Jason's Law, Section 1401 of Moving Ahead for Progress in the 21st Century, Public Law 112-141, the inaugural [Jason's Law Truck Parking Survey Results and Comparative Analysis](#) was completed in August 2015.



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Critical Issues in the Trucking Industry – 2018

On October 29, 2018, the American Transportation Research Institute (ATRI) [released](#) *Critical Issues in the Trucking Industry – 2018*. ATRI said the report was “based on an annual survey, which generated more than 1,500 responses from motor carriers and commercial drivers.” The top ten issues were: (1) driver shortage; (2) hours of service; (3) driver retention; (4) electronic logging device mandate; (5) truck parking; (6) [compliance, safety, and accountability scoring program](#); (7) driver distraction; (8) transportation infrastructure, congestion, and funding; (9) driver health and wellness; and (10) economy. Emerging issues ranked close to the top ten were: (11) highway safety and crash reduction; (12) tort reform; and (13) automated truck technology.

Federal Motor Carrier Safety Administration (FMCSA) Assessing Crash Risk Based on Commercial Motor Vehicle Driver Schedules

On October 25, 2018, FMCSA [announced](#) it will collect data as part of a “study to investigate how commercial motor vehicle (CMV) drivers’ schedules impact overall driver performance and safety. FMCSA needs these data to answer important research questions related to driver schedules and how these affect overall driver performance and fatigue.” Comments on the data collection were due by December 24, 2018, and can be viewed in [Docket No.FMCSA-2018-0279](#).

Cost of Congestion to the Trucking Industry: 2018 Update

On October 18, 2018, the American Transportation Research Institute [released](#) *Cost of Congestion to the Trucking Industry: 2018 Update*, which states that “traffic congestion on the U.S. National Highway System added nearly \$74.5 billion in operational costs to the trucking industry in 2016, a 0.5 percent increase over 2015.” Delays totaled “nearly 1.2 billion hours of lost productivity. This equates to 425,533 commercial truck drivers sitting idle for a working year.” The top ten States with the highest congestion costs were: Texas, California, Florida, New York, New Jersey, Illinois, Pennsylvania, Tennessee, Ohio, and North Carolina.

FMCSA Will Seek Input on the Definition of Agricultural Commodity

In October 2018, the White House Office of Management and Budget published a [notice](#) indicating that the U.S. Department of Transportation’s Federal Motor Carrier Safety Administration (FMCSA) will seek, by March 2019, “public input and data for use in a future proposal on the definition of agricultural commodity in the hours of service of drivers regulations at [49 CFR 395.1\(k\)\(1\)](#) and [49 CFR 395.2](#).” The regulations state that “hours of service rules do not apply during planting and harvest periods, as determined by each State, to drivers transporting agricultural commodities from the source of the agricultural commodities to a location within a 150 air-mile radius from the source. Agricultural commodity means any agricultural commodity, non-processed food, feed, fiber, or livestock (including livestock as defined in sec. 602 of the Emergency Livestock Feed Assistance Act of 1988 [7 U.S.C. 1471] and insects).”

An Analysis of the Operational Costs of Trucking: 2018 Update

On October 2, 2018, the American Transportation Research Institute [released](#) *An Analysis of the Operational Costs of Trucking: 2018 Update*. The ATRI report indicates “the average marginal cost per mile incurred by motor carriers increased six percent to \$1.69” in 2017, compared to 2016. Driver wages and benefits accounted for 43 percent of the total average marginal costs in 2017, and fuel costs accounted for 22 percent.

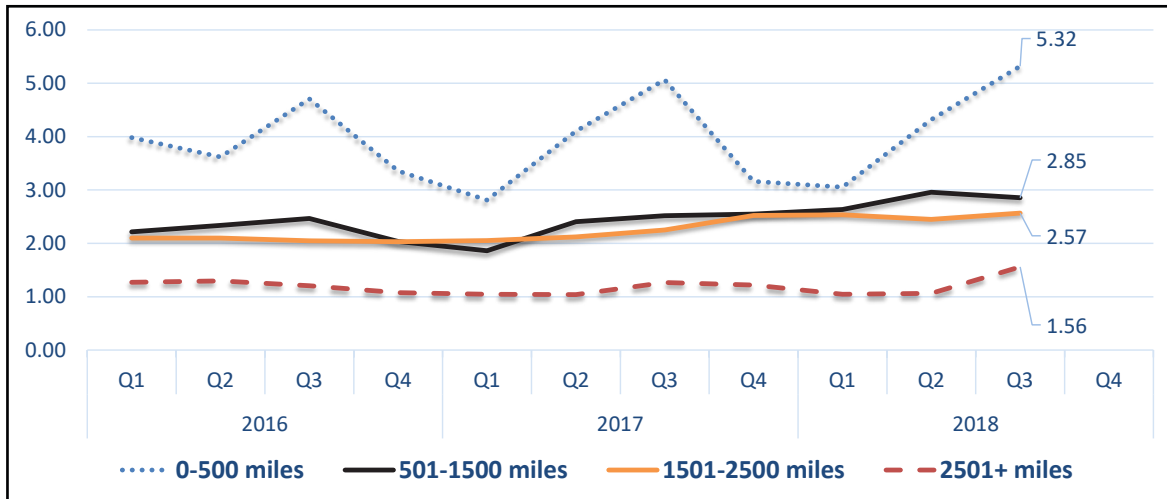


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NATIONAL SUMMARY

U.S. Truck Rates

Figure 1: Average Truck Rates for Selected Routes (\$/Mile)



Source: Agricultural Marketing Service, Specialty Crops Program, Market News Division

Table 1: Average U.S. Truck Rates for Selected Routes between 501 and 1500 miles (\$/Mile)

	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	*Annual
2018	2.64	2.96	2.85		
2017	1.86	2.40	2.52	2.55	2.33
2016	2.22	2.34	2.47	2.04	2.26
2015	2.47	2.62	2.43	2.36	2.47
2014	2.31	2.66	2.65	2.50	2.53
2013	2.24	2.60	2.62	2.31	2.44
2012	2.10	2.54	2.45	2.29	2.35
2011	2.02	2.60	2.77	2.26	2.41
2010	1.82	2.21	2.33	1.94	2.08
2009	1.85	1.99	2.02	1.86	1.93
2008	2.02	2.56	2.77	2.24	2.40
2007	1.89	2.23	2.25	2.03	2.10
2006	1.92	2.10	2.21	2.02	2.06

*Annual: Weighted average rate for all 4 quarters.

Source: Agricultural Marketing Service, Specialty Crops Program, Market News Division



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Table 2: Quarterly Rates for Key Origins by Month; 501-1500 miles (\$/Mile)

Origin	3rd Quarter 2018			2nd Quarter 2018		
	July	August	September	April	May	June
Arizona	n/a	n/a	n/a	2.90	n/a	n/a
California	3.16	3.22	3.17	2.97	2.99	3.71
Florida	3.78	n/a	n/a	2.63	3.16	2.89
Great Lakes	3.66	3.69	3.72	3.62	3.56	3.39
New York	2.83	n/a	2.92	2.97	3.23	3.44
Other	2.74	2.72	2.69	2.92	3.04	3.46
Mexico - Arizona	2.89	2.32	n/a	2.83	2.83	2.83
Mexico - Texas	2.47	2.18	2.10	2.77	2.66	2.69
PNW	2.01	2.00	2.15	2.17	2.12	2.02
Southeast	4.26	5.85	6.81	3.81	3.76	4.32
Texas	2.65	2.39	2.34	n/a	3.12	3.75

Source: Agricultural Marketing Service, Specialty Crops Program, Market News Division

Note: "n/a" indicates rates not available.

Note: The rates for 8 long-haul fruit and vegetable truck corridors are included in the national rate, weighted by commodity and origin volume.

Truck Rates for Selected Routes

Table 3: Origin-Destination Truck Rates for Selected Routes, 3rd Quarter 2018 (\$/Mile)

Origin	Destination									
	Atlanta	Baltimore	Boston	Chicago	Dallas	Los Angeles	Miami	New York	Philadelphia	Seattle
California	2.80	2.80	2.82	2.77	3.05	4.73	2.79	2.83	2.85	3.22
Florida	3.18	4.33	3.75	3.02	n/a	n/a	n/a	3.93	3.89	n/a
Great Lake	3.20	3.60	3.32	4.10	3.08	n/a	3.17	4.30	3.99	n/a
Indiana	n/a	n/a	n/a	4.46	n/a	n/a	n/a	n/a	n/a	n/a
Mexico-Arizona	n/a	n/a	n/a	2.42	3.57	2.33	2.59	3.24	2.86	n/a
Mexico-Texas	2.39	2.38	2.40	2.15	2.55	1.91	2.46	2.58	2.34	2.26
New York	3.00	5.15	8.97	3.27	n/a	n/a	2.55	9.35	8.35	n/a
Other	3.07	3.05	2.73	2.81	4.41	2.21	2.51	3.24	3.00	n/a
PNW	2.37	2.59	2.56	2.42	2.26	2.05	2.32	2.63	2.58	8.57
Southeast	7.70	8.25	5.30	3.98	4.08	n/a	5.51	7.31	7.26	n/a
Texas	2.59	2.48	2.49	2.26	2.97	2.01	2.58	2.72	2.44	2.33

Source: Agricultural Marketing Service, Specialty Crops Program, Market News Division

Note: "n/a" indicates rates not available



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Table 4: Origin-Destination Truck Rates for Selected Routes, 3rd Quarter 2018 (\$/Truck)

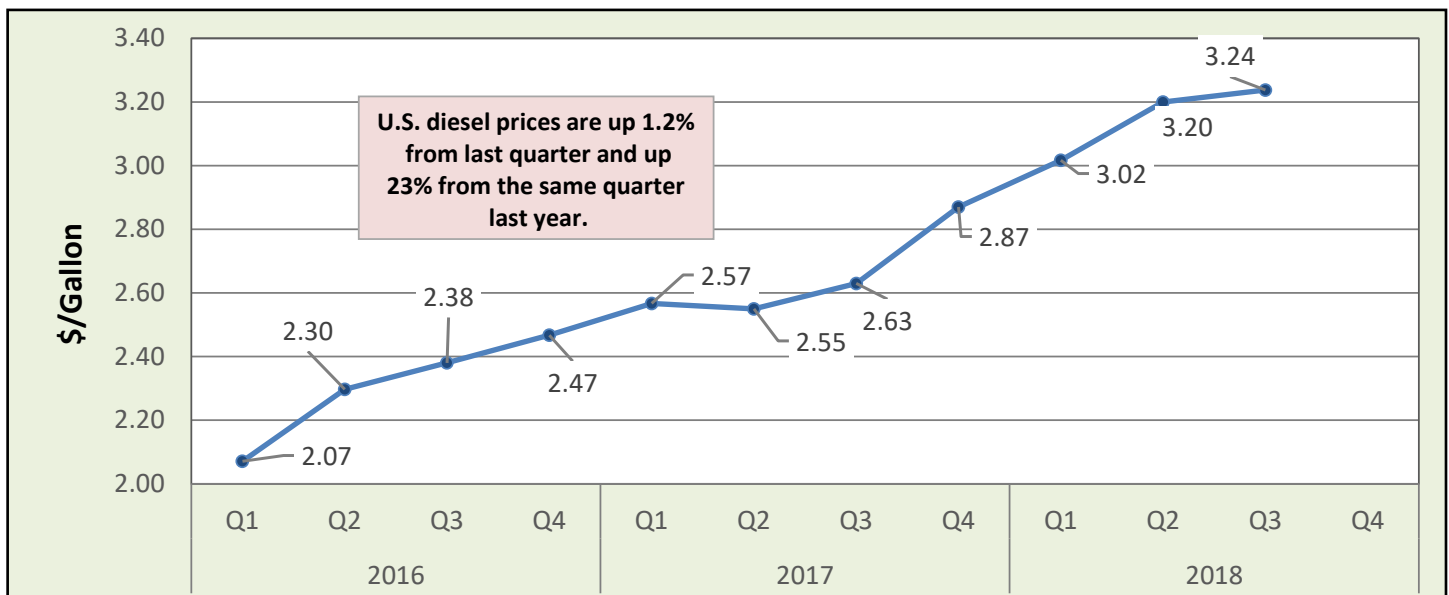
Origin	Destination									
	Atlanta	Baltimore	Boston	Chicago	Dallas	Los Angeles	Miami	New York	Philadelphia	Seattle
California	6,326	7,707	8,693	5,911	4,619	1,050	7,974	8,081	7,995	3,473
Florida	1,400	3,850	4,800	3,500	n/a	n/a	n/a	4,200	3,850	n/a
Great Lake	3,527	3,901	4,281	1,230	3,400	n/a	5,175	4,121	3,685	n/a
Indiana	n/a	n/a	n/a	1,248	n/a	n/a	n/a	n/a	n/a	n/a
Mexico-Arizona	n/a	n/a	n/a	4,350	3,500	1,306	5,900	8,100	6,875	n/a
Mexico-Texas	2,746	4,262	5,281	3,069	1,277	3,058	3,769	5,162	4,442	5,415
New York	3,000	1,700	2,081	2,750	.	n/a	3,700	1,846	1,920	n/a
Other	2,789	5,414	5,830	2,507	2,198	2,123	5,117	5,504	5,473	n/a
PNW	5,263	6,399	7,058	4,301	4,156	2,141	6,705	6,739	6,500	1,200
Southeast	2,562	3,244	4,397	3,380	4,900	n/a	3,910	4,125	3,431	n/a
Texas	2,746	4,262	5,281	3,069	1,277	3,058	3,769	5,162	4,442	5,415

Source: Agricultural Marketing Service, Specialty Crops Program, Market News Division
 Note: "n/a" indicates rates not available

U.S. Diesel Fuel Prices

The diesel fuel price provides a proxy for trends in U.S. truck rates. Diesel fuel is a significant component underlying truck rates.

Figure 2: U.S. Average On-Highway Diesel Fuel Prices



Source: Energy Information Administration/U.S. Department of Energy



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Table 5: 3rd Quarter 2018 Average Diesel Fuel Prices (All Types - \$/Gallon)

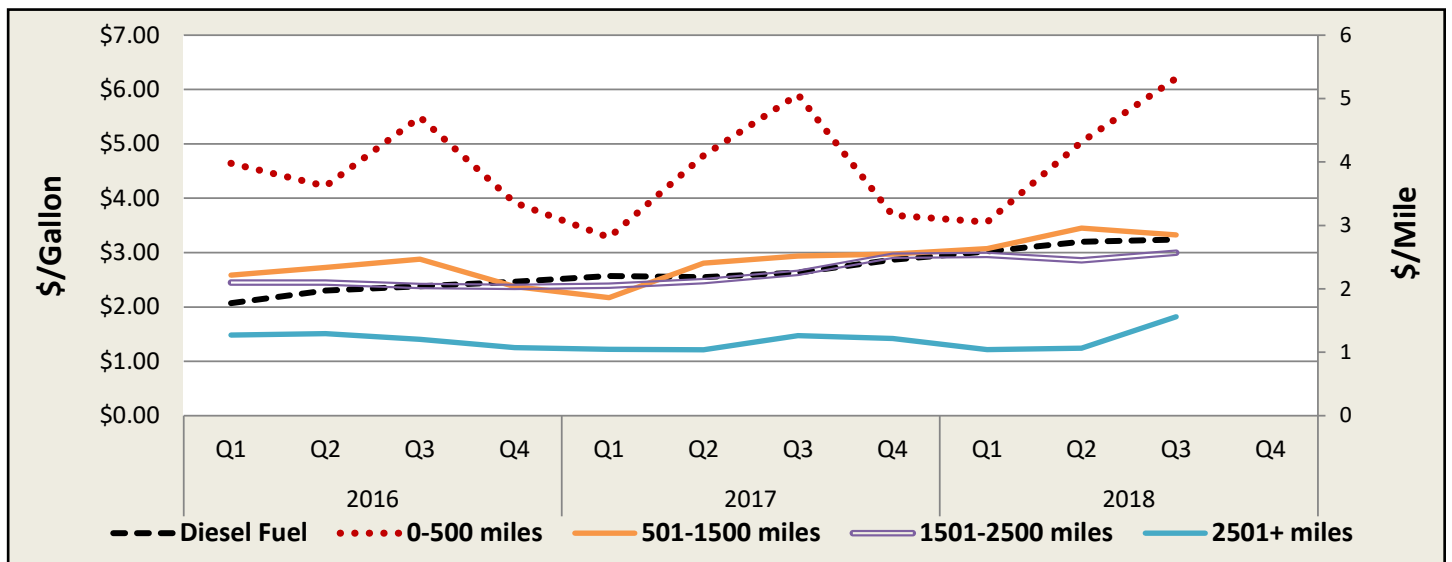
Location	Price	Change From Last Quarter	Change From Same Quarter Last Year
East Coast	3.23	0.03	0.57
New England	3.27	0.03	0.62
Central Atlantic	3.40	0.04	0.62
Lower Atlantic	3.11	0.03	0.54
Midwest	3.17	0.04	0.59
Gulf Coast	3.01	0.03	0.55
Rocky Mountain	3.36	0.10	0.66
West Coast	3.73	0.04	0.81
California	3.96	0.06	0.96
U.S.	3.24	0.04	0.61

Source: Energy Information Administration/U.S. Department of Energy

Relationship Between Diesel Fuel and Truck Rates

The diesel fuel price provides a proxy for trends in U.S. truck rates. Diesel fuel is a significant expense for fruit and vegetable movements.

Figure 3: U.S. Average On-Highway Diesel Fuel Prices and Truck Rates



Sources: Diesel Fuel: Energy Information Administration/U.S. Department of Energy; Truck Rate: Agricultural Marketing Service, Specialty Crops Program, Market News Division



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Table 6: Average Diesel Fuel Prices and Truck Rates

Year and Quarter	Diesel Fuel (\$/gallon)	Truck Rates (\$/mile) 501-1500 miles	% Change From Last Quarter: Diesel	% Change From Last Quarter: Truck	% Change From Same Quarter Last Year: Diesel	% Change From Same Quarter Last Year: Truck
2016 Quarter 1	2.07	2.22	-15%	-6%	-29%	-10%
2016 Quarter 2	2.30	2.34	11%	5%	-19%	-11%
2016 Quarter 3	2.38	2.47	3%	6%	-10%	2%
2016 Quarter 4	2.47	2.04	4%	-17%	2%	-14%
2017 Quarter 1	2.57	1.86	4%	-9%	24%	-16%
2017 Quarter 2	2.55	2.40	-1%	29%	11%	3%
2017 Quarter 3	2.63	2.52	3%	5%	11%	2%
2017 Quarter 4	2.87	2.55	9%	1%	16%	25%
2018 Quarter 1	3.02	2.64	5%	4%	18%	42%
2018 Quarter 2	3.20	2.96	6%	12%	25%	23%
2018 Quarter 3	3.24	2.85	1%	-4%	23%	13%
2018 Quarter 4						

Sources: Diesel Fuel: Energy Information Administration/U.S. Department of Energy; Truck Rates: Agricultural Marketing Service, Specialty Crops Program, Market News Division

3rd Quarter 2018 Comparison Analysis

Diesel fuel prices averaged \$3.238 per gallon this quarter, 1 percent higher than last quarter and 23 per-cent higher than the same quarter last year (see figure 2). Average truck rates for shipments between 501 and 1,500 miles were \$2.85 per mile, 4 percent lower than the previous quarter but 13 percent higher than the same quarter last year (see table 1).



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Quarterly Truck Availability

Table 7: U.S. Fresh Fruit and Vegetable Truck Availability, 3rd Quarter 2018

Truck availability legend														
1=Surplus	2=Slight surplus	3=Adequate	4=Slight shortage	5=Shortage										
Region: California, Central, and Western Arizona	Commodity	Week Ending												
		7/3	7/10	7/17	7/24	7/31	8/7	8/14	8/21	8/28	9/4	9/11	9/18	9/25
Central And Southern San Joaquin Valley, California	Nectarines, Peaches, Plums, Grapes, Apples	3	3	3	3	3	3	3	3	3	3	3	3	3
Imperial, Coachella & Palo Verde Valleys, California	Bell Peppers, Cantaloupes, Grapes, Honeydews, Watermelons	3	3	3										
Kern District, California	Grapes, Carrots, Potatoes	3	3	3	3	3	3	2	3	2	3	3	3	3
Salinas-Watsonville, California	Broccoli, Cauliflower, Iceberg Lettuce, Leaf Lettuce, Lettuce Romaine	3	3	3	3	3	3	2	3	2	3	3	3	3
San Joaquin Valley, California	Onions	4	4	4	4	4	4	4	4	4				
Santa Maria, California	Broccoli, Cauliflower, Iceberg Lettuce, Leaf Lettuce, Celery, Strawberries	3	3	3	3	3	3	2	3	2	3	3	3	3
South District, California	Avocados, Citrus	3	3	3	3	3	3	3	3	3	3	3	2	2
Region: Great Lakes (MI & WI)	Commodity	Week Ending												
		7/3	7/10	7/17	7/24	7/31	8/7	8/14	8/21	8/28	9/4	9/11	9/18	9/25
Central Wisconsin	Potatoes	3	3	3	3	3	3	3	3	3	3	3	3	3
Michigan	Cucumbers, Squash, Blueberries	4	4	3	3	3	3	3	3	3	3	3		
Region: Mexico Border Crossings	Commodity	Week Ending												
		7/3	7/10	7/17	7/24	7/31	8/7	8/14	8/21	8/28	9/4	9/11	9/18	9/25
Mexico Crossings Through Nogales, Arizona	Tomato Squash Cucumber Mango Honeydew Watermelon Mixed Fruits, Vegetables, Mango	3	3	3	3	3	3	3	3					
Mexico Crossings Through Texas	Vegetables, Limes Mangoes Onions Tomatoes Broccoli Mixed Fruits, Limes Mangoes Tomatoes Broccoli Mixed Fruits	2	1	1	1	1	1	1	1	1	1	1	1	1
Region: Pacific Northwest (ID, OR, & WA)	Commodity	Week Ending												
		7/3	7/10	7/17	7/24	7/31	8/7	8/14	8/21	8/28	9/4	9/11	9/18	9/25
Columbia Basin, Washington	Potatoes, Onions	4	4	4	4	4	4	4	3	3	3	4	4	4
Upper Valley, Twin Falls-Burley District, Idaho	Potatoes	4	4	4	4	4	4	4	3	3	3	4	4	4
Yakima Valley & Wenatchee District, Washington	Nectarines, Peaches, Apples, Cherries., Pears, Cherries, Peaches., Nectarines., Prunes.	4	3	3	3	3	3	3	3	3	3	3	4	4
Idaho and Malheur County, Oregon	Onions											4	4	4



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Table 7: U.S. Fresh Fruit and Vegetable Truck Availability, 3rd Quarter 2018 (continued)

Truck availability legend														
1=Surplus		2=Slight surplus			3=Adequate			4=Slight shortage			5=Shortage			
Region: Southeast (GA, SC, & NC)	Commodity	Week Ending												
		7/3	7/10	7/17	7/24	7/31	8/7	8/14	8/21	8/28	9/4	9/11	9/18	9/25
Eastern North Carolina	Sweet Potatoes	5	5	5	4	4	3	4	4	3	4	5		4
South Carolina	Melons, Tomatoes	5	4	5	5									
South Georgia	Peaches, Squash, Melons, Corn, Cucumber, Eggplant, Peppers	4	4	4	4									
Vidalia District, Georgia	Onions	4	4	4	4	4	4	4	4	4				
North Carolina	Melons				4	4	4	4	4	4	4			
Region: Texas and Oklahoma	Commodity	Week Ending												
		7/3	7/10	7/17	7/24	7/31	8/7	8/14	8/21	8/28	9/4	9/11	9/18	9/25
Lower Rio Grande Valley, Texas	Watermelons, Onions	2	1	1	1	1	1	1	1	1	1	1	1	1

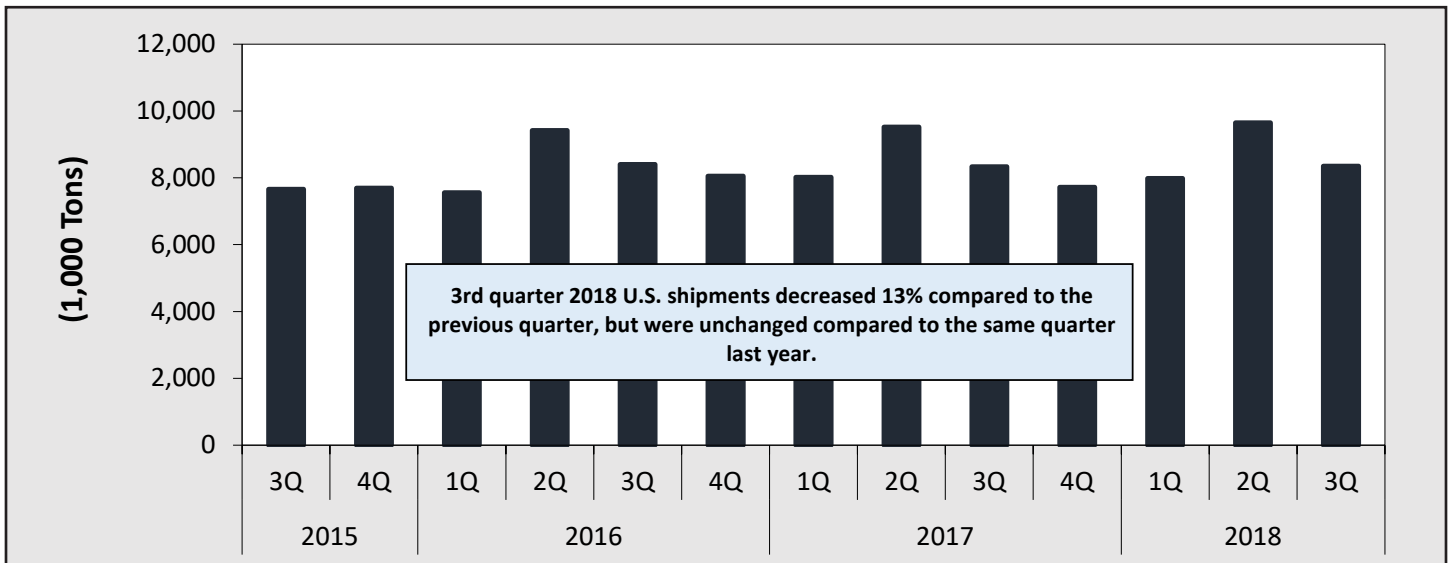
Note: Regions reported and commodities shipped vary by week, month, season, and year. Within a region, truck availability may vary by commodity and destination.

Note: Empty cells = no data available.

Source: USDA, AMS, Specialty Crops Program, Market News Division, *Weekly Fruit and Vegetable Truck Rate Report*

Reported U.S. Shipments

Figure 4: Reported U.S. Fruit and Vegetable Shipments (1,000 Tons)



Source: Agricultural Marketing Service, Specialty Crops Program, Market News Division



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Table 8: Reported U.S. Fruit and Vegetable Shipments (1,000 Tons)

Year	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter	Annual
2018	7,988	9,648	8,349		25,985
2017	8,017	9,518	8,334	7,722	33,592
2016	7,562	9,417	8,406	8,053	33,438
2015	8,166	9,433	7,659	7,699	32,957
2014	7,779	8,965	8,081	7,643	32,468
2013	7,451	8,972	7,762	6,546	30,731
2012	7,577	9,008	7,774	7,532	31,890
2011	7,007	8,981	7,887	7,988	31,863
2010	7,065	8,881	7,985	7,522	31,454
2009	7,158	8,728	7,990	7,270	31,147
2008	7,059	8,666	7,426	6,904	30,057
2007	6,959	8,585	7,475	7,099	30,118
2006	6,335	8,400	7,854	6,960	29,550
2005	6,877	8,324	7,737	7,387	30,325
2004	6,867	8,331	6,876	6,732	28,807
2003	6,824	8,013	7,043	6,684	28,564
2002	6,787	8,094	6,414	6,460	27,755

Source: Agricultural Marketing Service, Specialty Crops Program, Market News Division

Reported Shipments by Selected Commodities

Table 9: Reported Top 10 Commodity Shipments for 3rd Quarter 2018 (1,000 Tons)

Commodity	3rd Quarter 2018	Previous Quarter	Same Quarter Last Year	Current Quarter as % change from Previous Quarter	Current Quarter as % change from Same Quarter Last Year
Potatoes	1,100	1,070	1,205	3%	-9%
Watermelons, Seedless	1,026	1,103	950	-7%	8%
Apples	608	767	605	-21%	0%
Onions Dry	536	669	569	-20%	-6%
Grapes	371	173	355	114%	4%
Cantaloupes	358	250	303	43%	18%
Lettuce, Iceberg	321	356	306	-10%	5%
Strawberries	311	420	292	-26%	6%
Tomatoes	292	373	312	-22%	-6%
Lettuce, Romaine	245	274	237	-11%	3%

Source: Agricultural Marketing Service, Specialty Crops Program, Market News Division



Agricultural Refrigerated Truck Quarterly

REGIONAL MARKETS

California

Volume: Total reported shipments of fruits and vegetables from California during the third quarter of 2018 were 3.19 million tons, an 8 percent increase from the same quarter last year. The sum of the top five commodities increased 13 percent from the previous year. Grape shipments rose to the top followed by iceberg lettuce; cantaloupe and seedless watermelons both saw strong increases over the previous year.

Rates: The quarterly average truck rate for shipments between 501 and 1,500 miles was \$3.19 per mile, 0.1 percent lower than the previous quarter, but 12 percent higher than the same quarter last year.

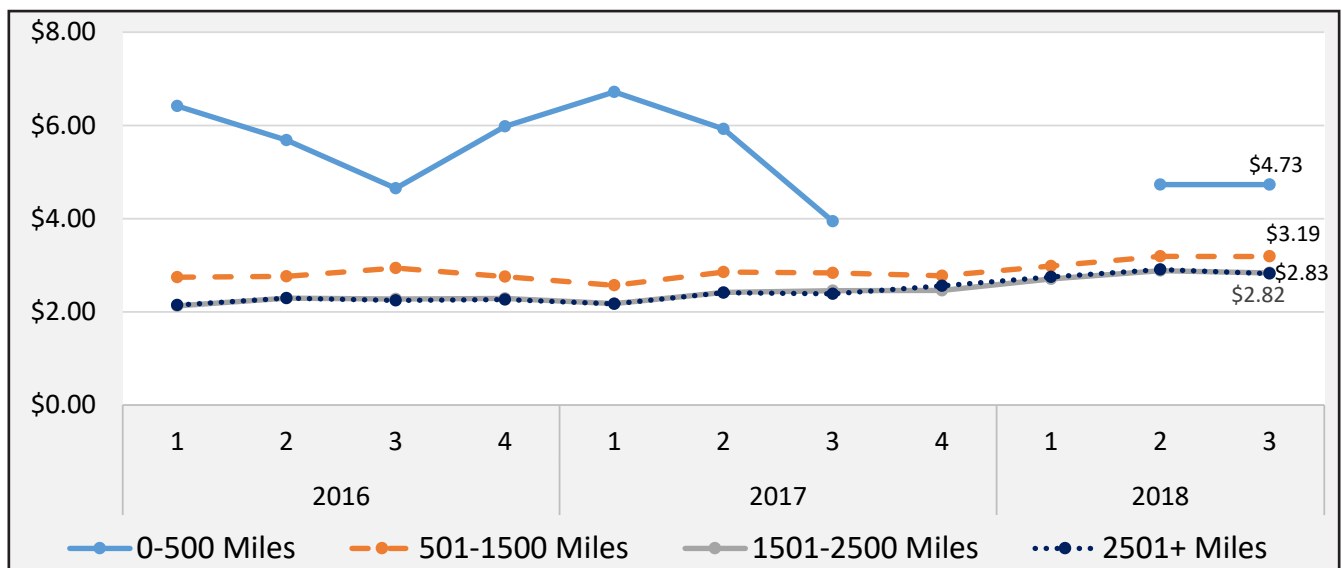
Truck Overview: Diesel fuel prices averaged \$3.96 per gallon, 1.5 percent higher than the previous quarter, and 32 percent higher than the same period last year. Shippers reported adequate truck availability in all California districts except the San Joaquin Valley throughout the quarter. Onions shippers in the San Joaquin Valley reported slight shortage conditions from July through August.

Table 10: Reported Top Five Commodities Shipped from California (1,000 tons)

Commodity	3rd Quarter 2018	Share of California Total	Previous Quarter	Same Quarter Last Year	Current Quarter as % of Previous Quarter	Current Quarter as % of Same Quarter Last Year
Grapes	368	12%	31	353	1089%	4%
Lettuce, Iceberg	318	10%	327	298	-3%	6%
Cantaloupes	316	10%	0	0	-	-
Strawberries	311	10%	404	292	-23%	6%
Watermelons, Seedless	260	8%	81	176	221%	48%
Top 5 Total	1,573	49%	843	1,120	87%	40%
California Total	3,186	100%	2,235	2,944	43%	8%

Source: Agricultural Marketing Service, Specialty Crops Program, Market News Division
 “-” indicates no reported shipments during the quarter.

Figure 5: California Truck Rates (\$/Mile by Distance Travelled)



Source: Agricultural Marketing Service, Specialty Crops Program, Market News Division



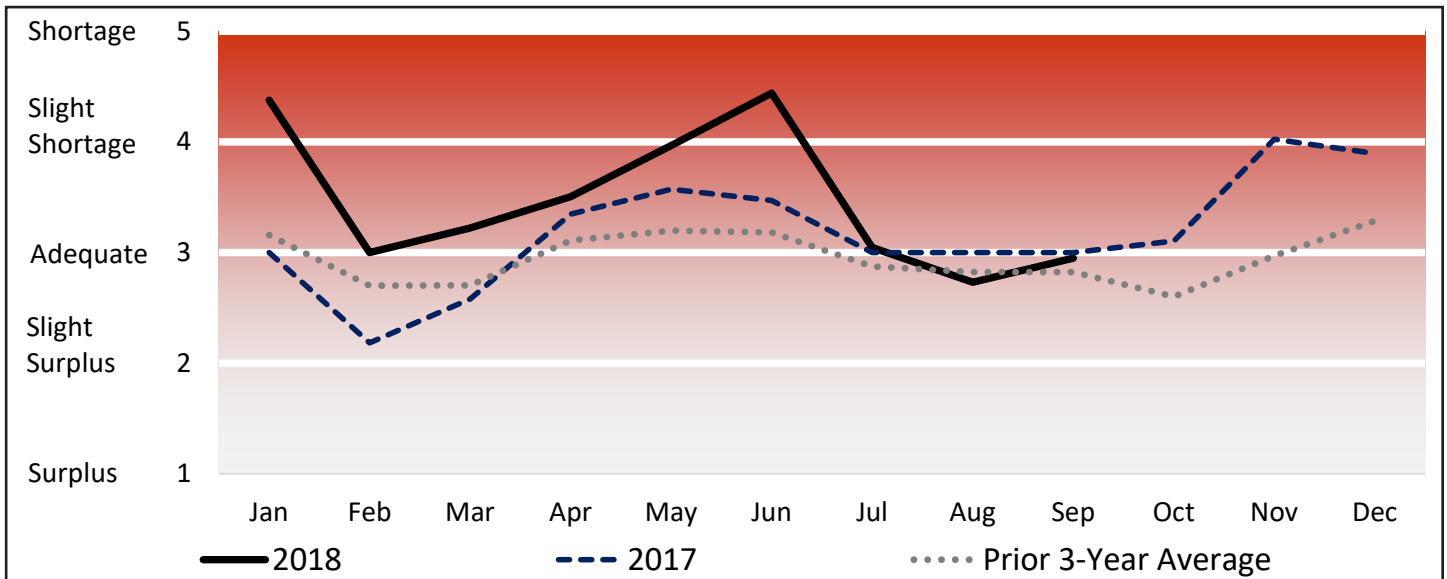
Agricultural Refrigerated Truck Quarterly

Table 11: California Truck Overview (Availability Rating: 1=Surplus to 5=Shortage)

Region/Reporting District	July	August	September	3rd Quarter
Central And Southern San Joaquin Valley, California	3.00	3.00	3.00	3.00
Kern District, California	3.00	2.50	3.00	2.83
Salinas-Watsonville, California	3.00	2.50	3.00	2.83
San Joaquin Valley, California	4.00	4.00	4.00	4.00
Santa Maria, California	3.00	2.50	3.00	2.83
South District, California	3.00	3.00	2.50	2.83
Imperial, Coachella & Palo Verde Valleys, California	3.00	n/a	n/a	3.00
Regional Average Availability	3.14	2.92	3.08	3.05
Diesel Fuel Price (\$/gallon)	3.96	3.94	3.97	3.96

Diesel Fuel Source: Energy Information Administration/U.S. Department of Energy
 For the purpose of this report, the California sub-group of the West Coast PAD District 5 was used to represent the diesel fuel price.

Figure 6: Refrigerated Truck Availability Monthly Ratings for California



Source: Agricultural Marketing Service, Specialty Crops Program, Market News Division



Agricultural Refrigerated Truck Quarterly

Pacific Northwest (PNW)

Volume: Total reported shipments of fruits and vegetables from the Pacific Northwest (PNW) during the third quarter of 2018 were 1.55 million tons, a decrease of 3 percent from the same quarter last year. A 5 percent increase in apples was offset by decreases in potatoes, dry onions, cherries, and pears.

Rates: The quarterly average truck rate for shipments between 501 and 1,500 miles was \$2.05 per mile, 3 percent lower than the previous quarter but 16 percent higher than the same quarter last year.

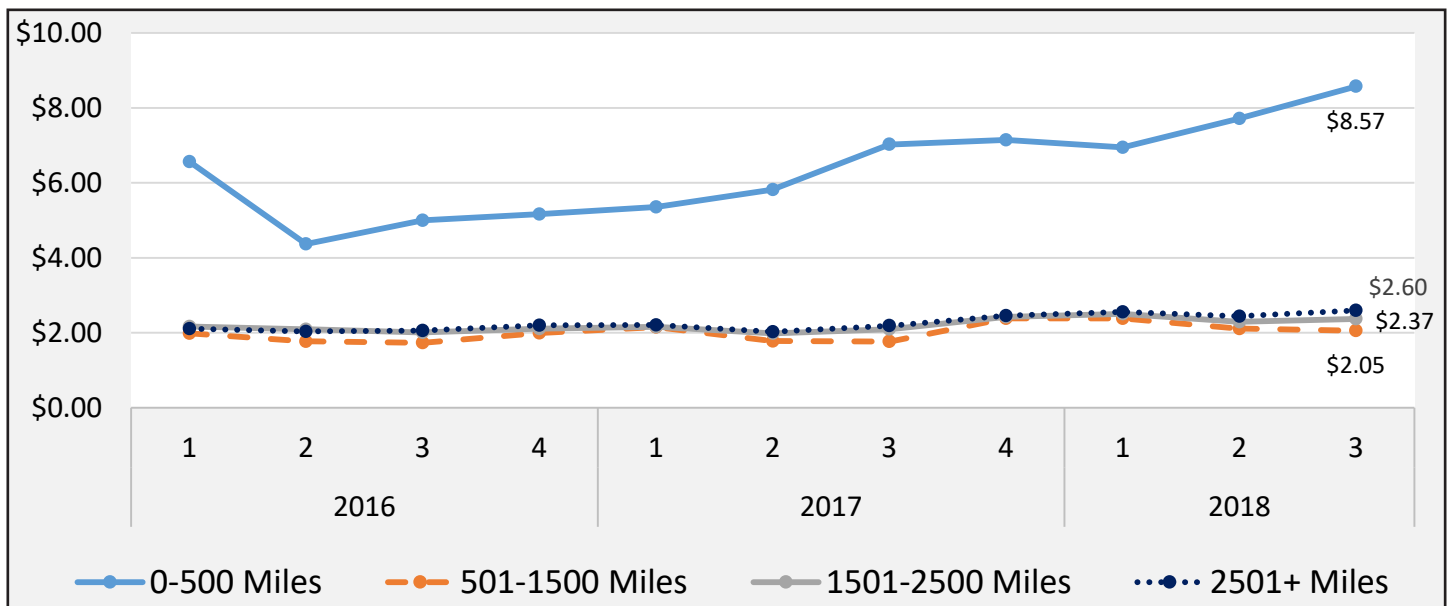
Truck Overview: Diesel fuel prices averaged \$3.45 per gallon, 1 percent higher than last quarter, and 23 percent higher than the same period last year. Shippers in the Washington Columbia Basin and the Upper Valley, Twin Falls-Burley District of Idaho reported slight shortage truck availability conditions from July through mid-August, adequate conditions from mid-August through early September, then slight shortage conditions the rest of September. In the Yakima Valley and Wenatchee District of Washington, availability was mostly adequate with slight shortage conditions in the first week of July and the last 2 weeks of September.

Table 12: Reported Top Five Commodities Shipped from PNW (1,000 tons)

Commodity	3rd Quarter 2018	Share of California Total	Previous Quarter	Same Quarter Last Year	Current Quarter as % of Previous Quarter	Current Quarter as % of Same Quarter Last Year
Potatoes	572	37%	539	609	6%	-6%
Apples	545	35%	707	517	-23%	5%
Onions Dry	221	14%	137	230	61%	-4%
Cherries	128	8%	86	151	50%	-15%
Pears	48	3%	69	54	-30%	-11%
Top 5 Total	1,514	97%	1,538	1,562	-2%	-3%
PNW Total	1,554	100%	1,551	1,601	0%	-3%

Source: Agricultural Marketing Service, Specialty Crops Program, Market News Division
 “-” indicates no reported shipments during the quarter.

Figure 7: PNW Truck Rates (\$/Mile by Distance Travelled)



Source: Agricultural Marketing Service, Specialty Crops Program, Market News Division



Agricultural Refrigerated Truck Quarterly

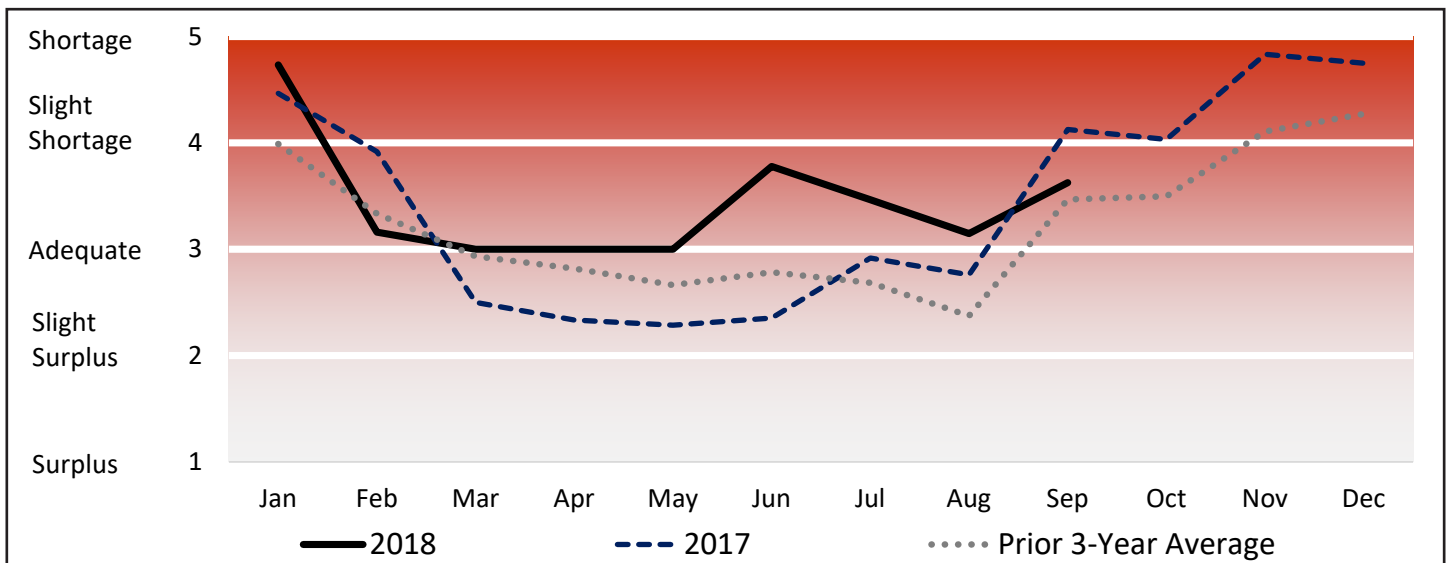
Table 13: PNW Truck Overview (Availability Rating: 1=Surplus to 5=Shortage)

Region/Reporting District	July	August	September	3rd Quarter
Columbia Basin, Washington	4.00	3.50	3.75	3.75
Idaho And Malheur County, Oregon	n/a	n/a	4.00	4.00
Upper Valley, Twin Falls-Burley District, Idaho	4.00	3.50	3.75	3.75
Yakima Valley & Wenatchee District, Washington	3.20	3.00	3.48	3.23
Regional Average Availability	3.73	3.33	3.75	3.60
Diesel Fuel Price (\$/gallon)	3.46	3.43	3.47	3.45

Diesel Fuel Source: Energy Information Administration/U.S. Department of Energy

For the purpose of this report, the West Coast less California District was used to represent the diesel fuel price for PNW.

Figure 8: Refrigerated Truck Availability Monthly Ratings for PNW



Source: Agricultural Marketing Service, Specialty Crops Program, Market News Division



Agricultural Refrigerated Truck Quarterly

Mexico Border Crossings

Volume: Total reported shipments of fruits and vegetables from Mexico during the third quarter of 2018 were 1.49 million tons, 2 percent less than the same quarter last year. The sum of the top five commodities decreased 1 percent from last year with increases in avocados, peppers, and tomatoes offset by decreases in limes and mango.

Rates: Truck rates for shipments between 501 and 1,500 miles from the Texas border crossings averaged \$2.27 per mile, down 28 percent from the previous quarter, but 13 percent higher than the same quarter last year. Rates for shipments between 501 and 1,500 miles from the Arizona border crossings averaged \$2.75 per mile, down 15 percent from last quarter, but 12 percent higher than the same quarter last year.

Truck Overview: Diesel fuel prices for border crossings from Texas averaged \$3.01 per gallon, 1 percent higher than the previous quarter, and 23 percent higher than the same quarter last year. Diesel fuel prices for border crossings from Arizona averaged \$3.45 per gallon, 1 percent higher than the previous quarter, and 23 percent higher than the same period last year. Shippers reported surplus truck availability conditions at Texas Border crossings throughout the quarter. At Arizona border crossings, shippers reported adequate conditions from July through August.

Table 14: Reported Top Five Commodities Shipped from Mexico (1,000 tons)

Commodity	3rd Quarter 2018	Share of California Total	Previous Quarter	Same Quarter Last Year	Current Quarter as % of Previous Quarter	Current Quarter as % of Same Quarter Last Year
Avocados	179	12%	250	158	-28%	13%
Limes	161	11%	157	173	3%	-7%
Peppers, Other	136	9%	125	118	9%	15%
Tomatoes	123	8%	181	122	-32%	1%
Mangoes	119	8%	168	150	-29%	-20%
Top 5 Total	718	48%	879	721	-18%	-1%
Mexico Total	1,491	100%	2,852	1,514	-48%	-2%

Source: Agricultural Marketing Service, Specialty Crops Program, Market News Division
 “-” indicates no reported shipments during the quarter.

Table 15: Mexico Truck Overview (Availability Rating: 1=Surplus to 5=Shortage)

Region/Reporting District	July	August	September	3rd Quarter
Mexico Crossings Through Nogales, Arizona	3.00	3.00	n/a	3.00
Mexico Crossings Through Texas	1.20	1.00	1.00	1.07
Regional Average Availability	2.10	2.00	1.00	1.70
Diesel Fuel Price, through Arizona(\$/gallon)	3.46	3.43	3.47	3.45
Diesel Fuel Price, through Texas (\$/gallon)	3.00	2.99	3.05	3.01

Diesel Fuel Source: Energy Information Administration/U.S. Department of Energy
 For the purpose of this report, the Gulf Coast PAD District 3 was used to represent the diesel fuel price through Texas.
 For the purpose of this report, the West Coast less California District was used to represent the diesel fuel price through Arizona.



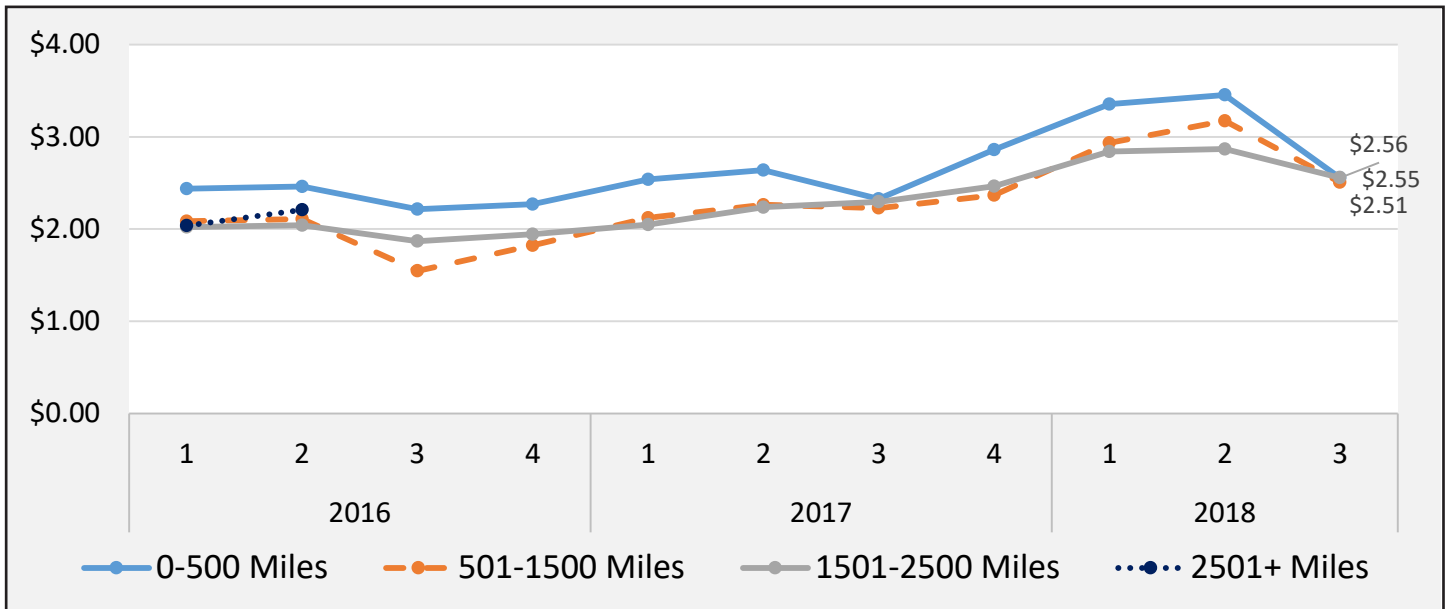
Agricultural Refrigerated Truck Quarterly

Table 16: Top 5 Commodities Shipped to U.S. from Mexico by State of Entry (1,000 tons)

Texas		California		Arizona		New Mexico	
Commodity	3rd Quarter 2018	Commodity	3rd Quarter 2018	Commodity	3rd Quarter 2018	Commodity	3rd Quarter 2018
Avocados	174	Misc Tropical	39	Mangoes	50	Peppers, Other	66
Limes	140	Cucumbers	34	Tomatoes	18	Onions Dry	9
Tomatoes	91	Peppers, Other	33	Cucumbers	10	Misc Tropical	1
Mangoes	68	Onions Green	30	Bananas	8	Cucumbers	1
Tomatoes, Plum Type	68	Tomatoes, Plum Type	30	Tomatoes, Plum Type	7	Corn-Sweet	0.2
Top 5 Total	541	Top 5 Total	166	Top 5 Total	94	Top 5 Total	77
Mexico through TX Total	987	Mexico through CA Total	294	Mexico through AZ Total	134	Mexico through NM Total	77

Source: Agricultural Marketing Service, Specialty Crops Program, Market News Division

Figure 9: Mexico Truck Rates (\$/Mile by Distance Travelled)

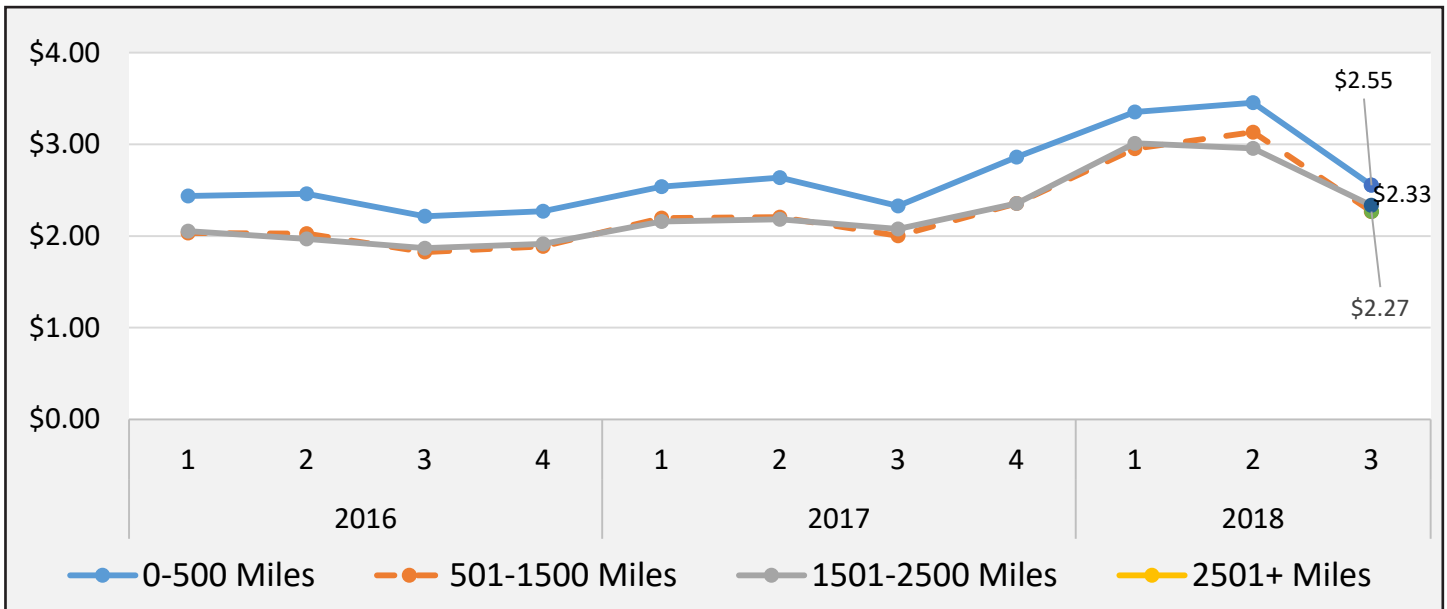


Source: Agricultural Marketing Service, Specialty Crops Program, Market News Division



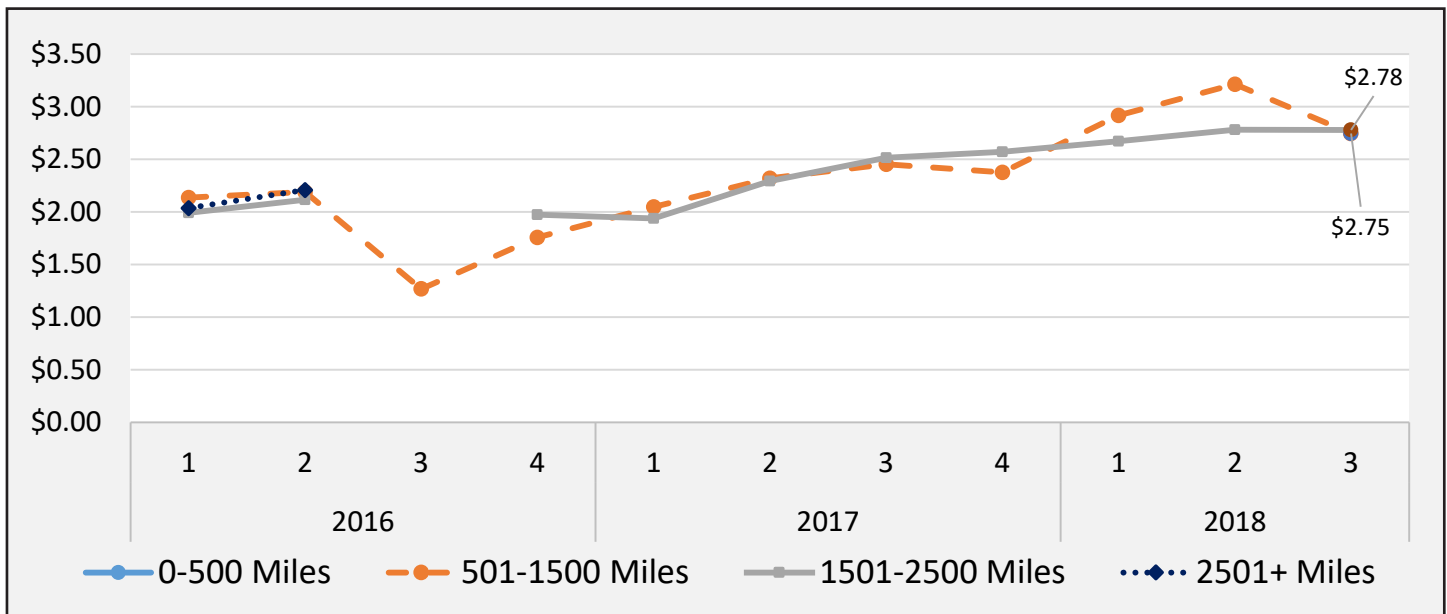
Agricultural Refrigerated Truck Quarterly

Figure 10: Mexico through Texas Truck Rates (\$/Mile by Distance Travelled)



Source: Agricultural Marketing Service, Specialty Crops Program, Market News Division

Figure 11: Mexico through Arizona Truck Rates (\$/Mile by Distance Travelled)

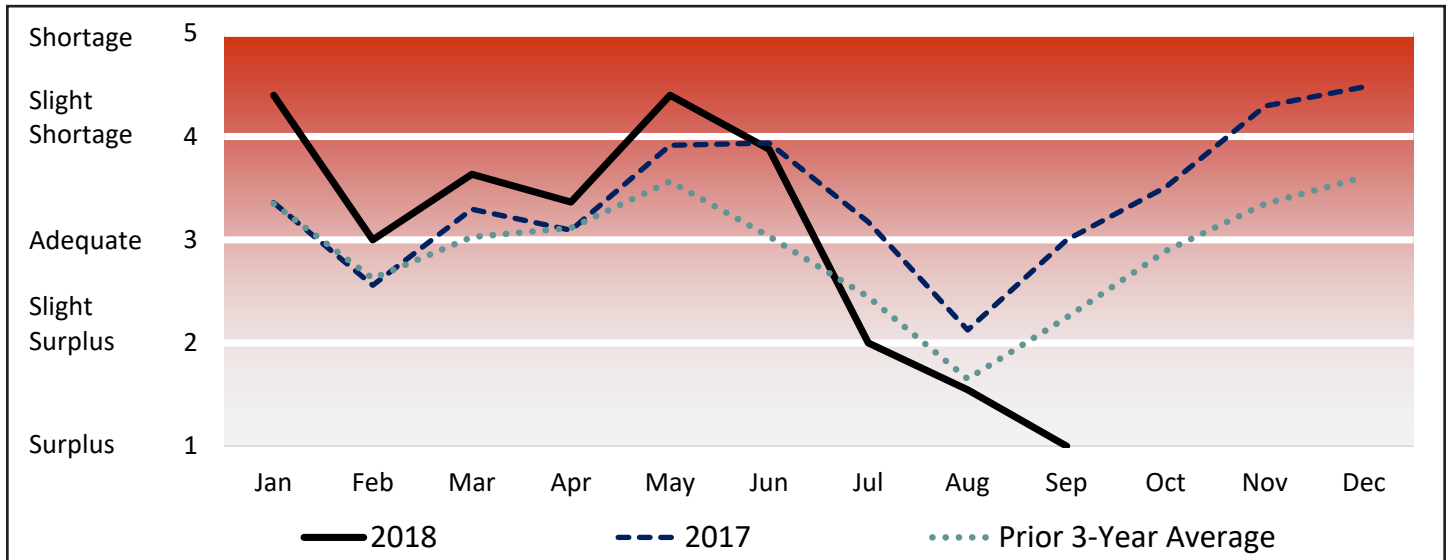


Source: Agricultural Marketing Service, Specialty Crops Program, Market News Division



Agricultural Refrigerated Truck Quarterly

Figure 12: Refrigerated Truck Availability Monthly Ratings for Mexico



Source: Agricultural Marketing Service, Specialty Crops Program, Market News Division



Agricultural Refrigerated Truck Quarterly

Southeast

Volume: Total reported shipments of fruits and vegetables from the Southeast during the third quarter of 2018 were 421 thousand tons, up 0.3 percent from the same quarter last year. The sum of the top five commodities also increased 1 percent from the same quarter last year. Decreases in sweet potato and sweet corn shipments were offset by strong increases in peaches, dry onions, and seedless watermelons.

Rates: The quarterly average truck rate for shipments between 501 and 1,500 miles was \$5.36 per mile, 33 percent higher than the previous quarter, and 12 percent higher than the same quarter last year.

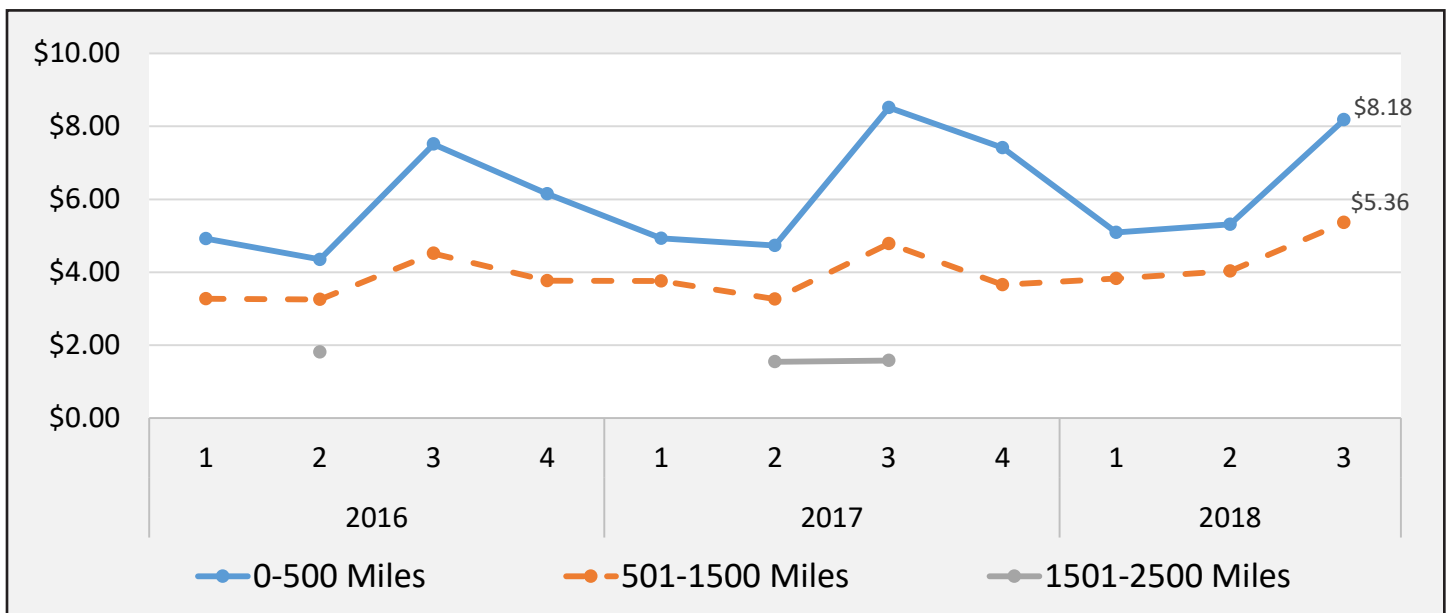
Truck Overview: Diesel fuel prices averaged \$3.11 per gallon, 1 percent higher than the previous quarter and 21 percent higher than the same period last year. Shippers in the Southeast region reported slight shortage and shortage conditions throughout much of the quarter.

Table 17: Reported Top Five Commodities Shipped from Southeast (1,000 tons)

Commodity	3rd Quarter 2018	Share of California Total	Previous Quarter	Same Quarter Last Year	Current Quarter as % of Previous Quarter	Current Quarter as % of Same Quarter Last Year
Watermelons, Seedless	215	51%	158	213	36%	1%
Sweet Potatoes	59	14%	83	77	-28%	-23%
Onions Dry	44	10%	84	38	-48%	14%
Peaches	25	6%	21	7	17%	235%
Corn-Sweet	12	3%	110	15	-89%	-25%
Top 5 Total	355	84%	455	352	-22%	1%
Southeast Total	421	100%	697	420	-40%	0.3%

Source: Agricultural Marketing Service, Specialty Crops Program, Market News Division
 “.” indicates no reported shipments during the quarter.

Figure 13: Southeast Truck Rates (\$/Mile by Distance Travelled)

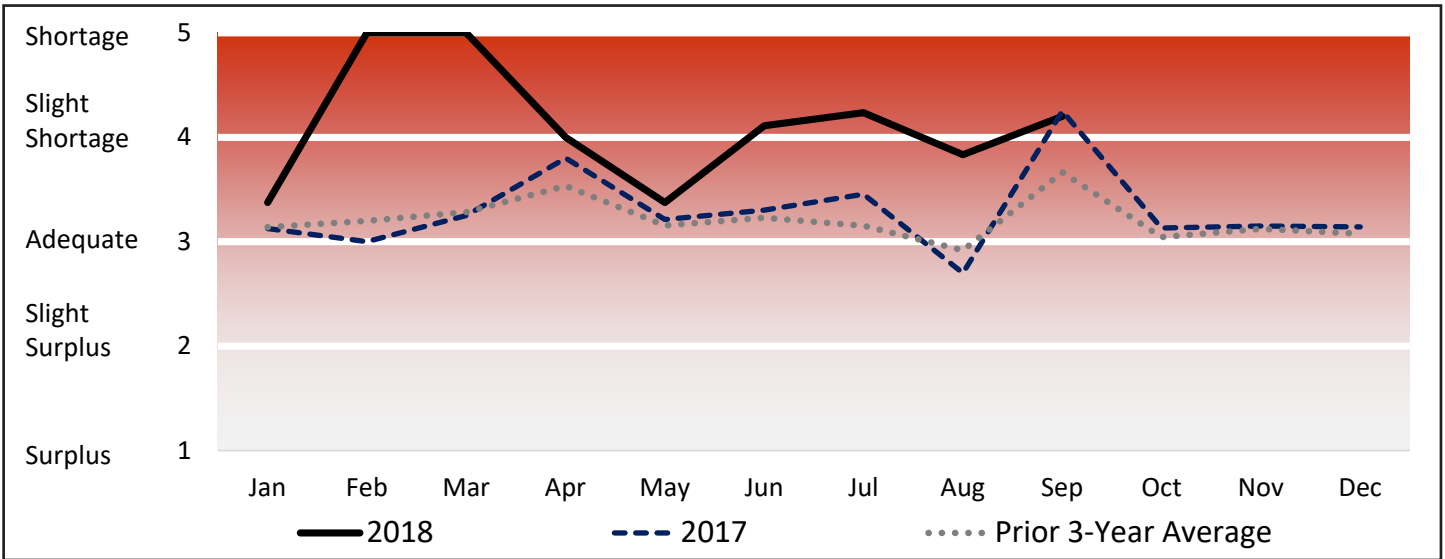


Source: Agricultural Marketing Service, Specialty Crops Program, Market News Division



Agricultural Refrigerated Truck Quarterly

Figure 14: Refrigerated Truck Availability Monthly Ratings for Southeast



Source: Agricultural Marketing Service, Specialty Crops Program, Market News Division

Table 18: Southeast Truck Overview (Availability Rating: 1=Surplus to 5=Shortage)

Region/Reporting District	July	August	September	3rd Quarter
Eastern North Carolina	4.60	3.50	4.33	4.14
North Carolina	4.00	4.00	4.00	4.00
South Carolina	4.75	n/a	n/a	4.75
South Georgia	4.00	n/a	n/a	4.00
Vidalia District Georgia	4.00	4.00	n/a	4.00
Regional Average Availability	4.30	3.75	4.17	4.07
Diesel Fuel Price (\$/gallon)	3.10	3.09	3.13	3.11

Diesel Fuel Source: Energy Information Administration/U.S. Department of Energy
 For the purpose of this report, the Lower Atlantic District was used to represent the diesel fuel price for the Southeast.



Agricultural Refrigerated Truck Quarterly

Great Lakes

Volume: Total reported shipments of fruits and vegetables from the Great Lakes during the third quarter of 2018 were 355 thousand tons, down 15 percent from the same quarter last year. The sum of the top five commodities also decreased 15 percent with decreases in potatoes, cucumbers, peppers, and apples.

Rates: The quarterly average truck rate for shipments between 501 and 1,500 miles was \$3.68 per mile, 4 percent higher than the previous quarter, and 2 percent higher than the same quarter last year.

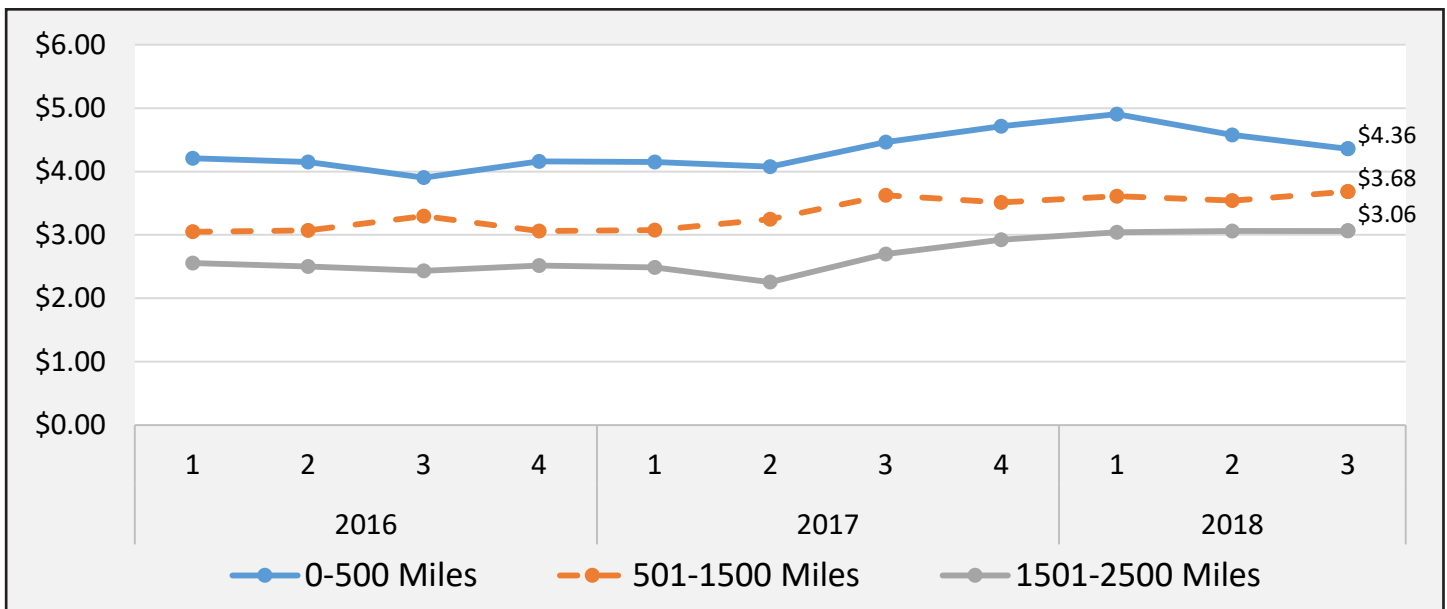
Truck Overview: Diesel fuel prices averaged \$3.13 per gallon, 1.4 percent higher than last quarter, and 23 percent higher than the same period last year. Shippers in Central Wisconsin and Michigan reported mostly adequate truck availability conditions throughout the quarter except for 2 weeks of slight shortage conditions in early July in Michigan.

Table 19: Reported Top Five Commodities Shipped from Great Lakes (1,000 tons)

Commodity	3rd Quarter 2018	Share of California Total	Previous Quarter	Same Quarter Last Year	Current Quarter as % of Previous Quarter	Current Quarter as % of Same Quarter Last Year
Potatoes	142	40%	89	171	59%	-17%
Watermelons, Seedless	46	13%	0	44	-	4%
Cucumbers	39	11%	2	42	1745%	-7%
Peppers, Bell Type	19	5%	0	24	-	-22%
Apples	17	5%	17	26	0%	-35%
Top 5 Total	262	74%	108	308	143%	-15%
Great Lakes Total	355	100%	119	418	199%	-15%

Source: Agricultural Marketing Service, Specialty Crops Program, Market News Division
 “-” indicates no reported shipments during the quarter.

Figure 15: Great Lakes Truck Rates (\$/Mile by Distance Travelled)



Source: Agricultural Marketing Service, Specialty Crops Program, Market News Division



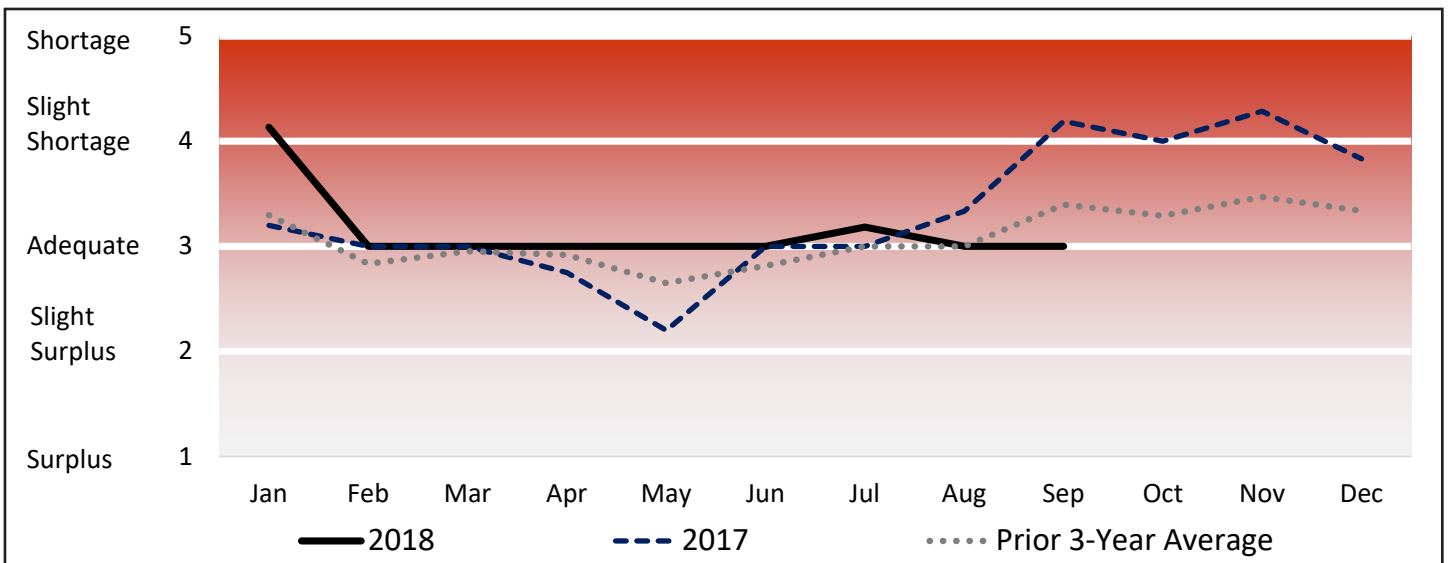
Agricultural Refrigerated Truck Quarterly

Table 20: Great Lakes Truck Overview (Availability Rating: 1=Surplus to 5=Shortage)

Region/Reporting District	July	August	September	3rd Quarter
Central Wisconsin	3.00	3.00	3.00	3.00
Michigan	3.26	3.00	3.00	3.09
Minnesota-North Dakota (Red River Valley)	3.00	3.00	n/a	3.00
Regional Average Availability	3.09	3.00	3.00	3.03
Diesel Fuel Price (\$/gallon)	3.16	3.14	3.20	3.17

Diesel Fuel Source: Energy Information Administration/U.S. Department of Energy
 For the purpose of this report, the Midwest District was used to represent the diesel fuel price for the Great Lakes.

Figure 16: Refrigerated Truck Availability Monthly Ratings for Great Lakes



Source: Agricultural Marketing Service, Specialty Crops Program, Market News Division



TERMS AND REFERENCES

Data Sources: This information is compiled from the weekly Specialty Crops Truck Rate Report by USDA, Agricultural Marketing Service (AMS), Specialty Crops Program, Market News Division. The website is: <https://www.marketnews.usda.gov/mnp/fv-home>.

Regional Markets: For the regional markets, some States are grouped into producing regions. The Pacific Northwest region includes Idaho, Oregon, and Washington. The Great Lakes region includes Michigan, Minnesota, and Wisconsin. The Southeast region includes North Carolina, South Carolina and Georgia.

Shipment Volumes: Truck shipments for all commodities and origins are not available. Those obtainable are reported, but should not be interpreted as representing complete movements of a commodity. Truck shipments from all States are collected at shipping points and include both interstate and intrastate movements. They are obtained from various sources, including Federal marketing orders, administrative committees, Federal State Inspection Service, and shippers. Volume amounts are represented in 10,000 pound units, or 1,000 10-lb packages but are converted to 1,000 tons for this report. Mexican border crossings through Arizona and Texas data is obtained from the Department of Homeland Security (DHS), U.S. Customs and Border and Protection (CBP) through USDA, AMS, Market News.

Rates: This information is compiled from the weekly Specialty Crops Truck Rate Report. Rates quoted represent open (spot) market rates that shippers or receivers pay depending on basis of sale, per load, including truck brokers fees for shipments in truck load volume to a single destination. Extra charges for delivery to terminal markets, multipickup and multidrop shipments are not included unless otherwise stated. Rates are based on the most usual loads in 48-53 foot trailers from the origin shipping area to the destination receiving city. In areas where rates are based on package rates, per load rates were derived by multiplying the package rate by the number of packages in the most usual load in a 48-53 foot trailer. Slightly cheaper rates will be reported during Quarters 2 and 3 as about 50 percent of onion shipments from California are hauled on open flatbed trailers. During Quarter 3, less than 20 percent of onions hauled from Washington, Idaho, and Oregon are on open flatbeds.

Regional Rates: Rate data for 10 destination markets are used to calculate average origin regional rates.

National Rates: The national rates reflect the average of the regional rates, separated by mileage category and weighted by volume between origin and destination.



Agricultural Refrigerated Truck Quarterly

CONTACT INFORMATION

Adam Sparger, Coordinator

Adam.Sparger@ams.usda.gov, 202.205.8701

April Taylor, Quarterly Overview and U.S. Diesel Prices

April.Taylor@ams.usda.gov, 202.295.7374

Brian McGregor, Regulatory News/Updates

Brian.McGregor@ams.usda.gov, 202.720.0035

Jesse Gastelle, Data Manager

Jesse.Gastelle@ams.usda.gov, 202.690.1144

Patty Willkie, Specialty Crops Program and Market News Division Data

Patty.Willkie@ams.usda.gov, 202.720.2175

Related Websites:

Specialty Crops Program

<http://www.ams.usda.gov/about-ams/programs-offices/specialty-crops-program>

Specialty Crops Truck Rate Report

<http://www.ams.usda.gov/market-news/fruits-vegetables>

Economic Research Service Vegetable and Pulses

<http://www.ers.usda.gov/topics/crops/vegetables-pulses.aspx>

Economic Research Service Fruit and Tree Nuts

<http://www.ers.usda.gov/topics/crops/fruit-tree-nuts.aspx>

National Agricultural Statistics Service, Crops

http://www.nass.usda.gov/Statistics_by_Subject/index.php?sector=CROPS

Refrigerated Truck Quarterly Datasets

<https://www.ams.usda.gov/services/transportation-analysis/agricultural-refrigerated-truck-quarterly-datasets>

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