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Agricultural Refrigerated Truck Quarterly

a quarterly publication of the Agricultural Marketing Service

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National Summary

Quarterly Overview

Fruit and Vegetable Shipments

USDA reported first quarter 2025 U.S. truck shipments of fresh produce were 8.62 million tons—up 4 percent from the previous quarter and down 9 percent from first quarter 2024.

Also, in first quarter 2025, shipments from Mexico were 3.51 million tons—a higher volume than from any other reported origin. Shipments from Mexico accounted for 41 percent of the total reported shipments of fresh fruit and vegetables. Shipments from the next four top regions by volume were as follows: Pacific Northwest (PNW), 1.58 million tons (18 percent of the total); Arizona, 1.28 million tons (15 percent of the total); Florida, 641,000 tons (7 percent of the total); and finally, California, 465,000 tons (5 percent of the total). However, as of the date of publication, there is a delay in the reporting of California citrus movements, which is missing from this report. The data is expected to be included in the second quarter report.

These top five commodities accounted for 40 percent of reported truck movements in first quarter 2025:

- Potatoes (13 percent)
- Processed lettuce (8 percent)
- Apples (8 percent)
- Dry onions (7 percent)
- Strawberries (4 percent)

Truck Rates

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

Average U.S. Truck Rates for Select Routes Between 501 and 1,500 Miles ($/Mile)

	0-500 miles	501-1,500 miles	1,501-2,500 miles	2,501+ miles
Q1 2024	5.82	2.69	2.43	1.64
Q2 2024	6.44	2.84	2.47	1.61
Q3 2024	6.99	2.58	2.37	1.29
Q4 2024	4.89	2.56	2.39	1.35
Q1 2025	2.92	2.30	2.41	1.50
Q1 Change from Previous Quarter	-40%	-10%	< 1%	11%
Q1 Change from Same Quarter Last Year	-50%	-15%	> -1%	-8%

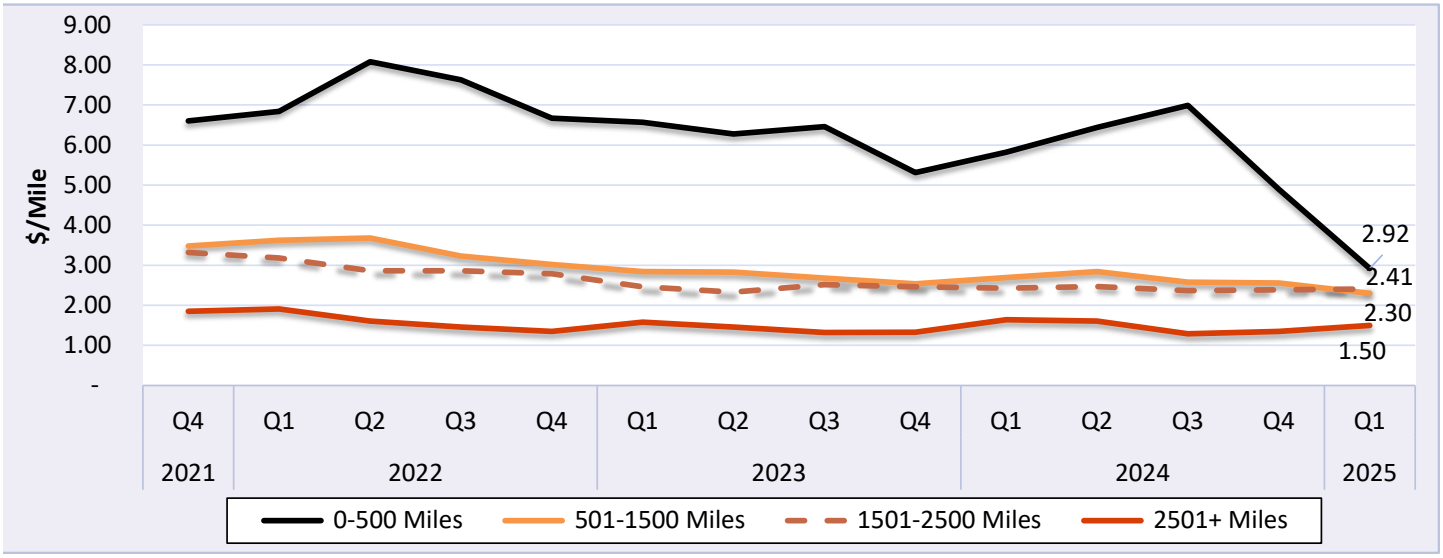
Note: The rates for 8 long-haul fruit and vegetable truck corridors are included in the national rate, weighted by commodity and origin volume. Table values may not conform exactly due to rounding.
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.

Diesel Fuel

During first quarter 2025, the U.S. diesel fuel price averaged $3.63 per gallon—up 3 percent from the previous quarter and down 9 percent from the same quarter in 2024.

U.S. Truck Rates

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



Note: The rates for 8 long-haul fruit and vegetable truck corridors are included in the national rates, weighted by commodity and origin volume.
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.

Table 1: Average U.S. Truck Rates for Select Routes Between 501 and 1,500 Miles ($/Mile)

Year	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
2025	2.30			
2024	2.69	2.84	2.58	2.56
2023	2.84	2.83	2.68	2.54
2022	3.62	3.68	3.23	3.02
2021	2.92	3.56	3.22	3.48
2020	2.57	2.53	2.58	2.94
2019	2.60	2.62	2.48	2.55
2018	2.84	3.01	2.76	2.85
2017	1.85	2.43	2.47	2.57
2016	2.23	2.38	2.44	2.06
2015	2.47	2.66	2.54	2.37
2014	2.21	2.70	2.67	2.50
2013	2.25	2.63	2.65	2.29

Note: The rates for 8 long-haul fruit and vegetable truck corridors are included in the national rate, weighted by commodity and origin volume. Table values may not conform exactly due to rounding.
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.

Table 2: Quarterly Rates for Key Origins by Month; 501-1,500 miles ($/Mile)

	1st Quarter, 2025			4th Quarter, 2024		
U.S. Origin	January	February	March	October	November	December
California	3.51	2.89	2.14	3.15	3.64	3.39
Florida	2.33	2.60	2.38	1.87	1.81	2.23
Great Lakes	4.29	4.29	4.29	4.29	4.29	4.29
Mexico-Arizona	3.43	2.63	2.62	2.75	2.99	3.29
Mexico-Texas	3.36	3.01	2.92	2.44	2.72	2.90
New York	3.18	3.18	3.18	3.18	3.18	3.18
Other	3.00	3.00	3.00	3.00	3.00	3.00
PNW	2.98	2.76	2.72	2.41	2.56	2.66
Southeast	n/a	n/a	n/a	2.70	2.70	n/a

Note: "n/a" indicates rates not available.
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.

Truck Rates for Select Routes

Table 3: Origin-Destination Truck Rates for Select Routes, 1st Quarter 2025 ($/Mile)

U.S. Origin	Atlanta	Baltimore	Boston	Chicago	Dallas	Los Angeles	Miami	New York	Philadelphia	Seattle
Arizona	2.93	2.74	n/a	2.51	n/a	n/a	n/a	2.83	2.76	n/a
California	2.63	2.67	2.51	2.38	2.84	10.44	2.81	2.68	2.69	n/a
Florida	2.64	2.45	2.54	1.84	n/a	1.51	3.54	2.75	2.41	n/a
Great Lakes	4.42	4.26	4.23	5.80	n/a	n/a	3.60	4.27	n/a	n/a
Mexico-Arizona	2.76	2.64	2.70	2.45	2.93	2.86	2.81	2.74	2.74	n/a
Mexico-Texas	3.40	3.02	n/a	2.79	3.91	2.09	3.03	n/a	3.03	n/a
New York	3.50	n/a	15.59	n/a	n/a	n/a	2.86	15.67	9.35	n/a
Other	2.95	3.20	2.90	n/a	3.05	n/a	n/a	n/a	n/a	n/a
PNW	2.76	2.83	2.74	2.66	2.72	2.82	2.67	2.88	2.74	6.78

Note: "n/a" indicates rates not available.
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.

Table 4: Origin-Destination Truck Rates for Select Routes, 1st Quarter 2025 ($/Truck)

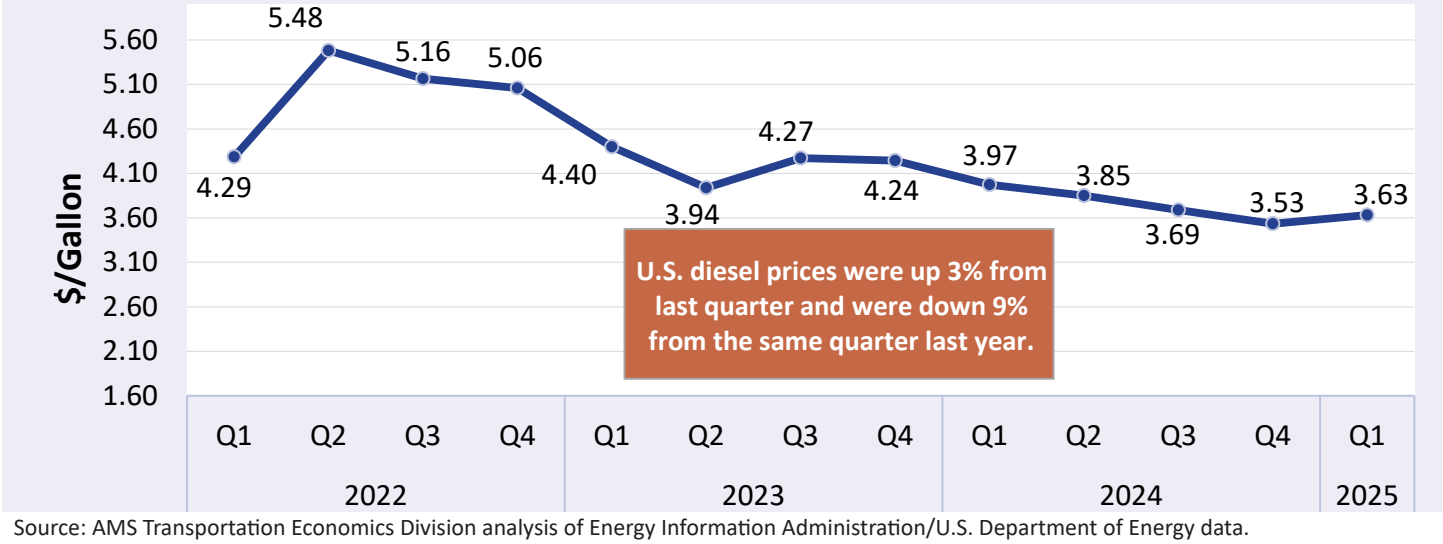
U.S. Origin	Atlanta	Baltimore	Boston	Chicago	Dallas	Los Angeles	Miami	New York	Philadelphia	Seattle
Arizona	6,150	7,118	n/a	5,100	n/a	n/a	n/a	7,638	7,318	n/a
California	5,667	7,221	7,903	4,881	3,804	1,400	7,547	7,554	7,418	3,117
Florida	1,305	2,429	3,525	2,263	n/a	3,800	850	3,170	2,629	n/a
Great Lakes	4,200	4,000	4,650	1,450	n/a	n/a	5,838	4,400	n/a	n/a
Mexico-Arizona	4,968	6,205	7,292	4,418	2,871	1,600	6,391	6,858	6,579	n/a
Mexico-Texas	3,913	5,400	n/a	3,988	1,954	3,346	4,638	n/a	5,750	n/a
New York	3,500	n/a	2,650	n/a	n/a	n/a	4,150	2,350	2,150	n/a
Other	4,250	5,725	6,225	n/a	2,225	n/a	n/a	n/a	n/a	n/a
PNW	6,436	6,979	7,533	4,750	5,049	2,917	7,997	7,354	7,232	949

Note: "n/a" indicates rates not available.
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.

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: AMS Transportation Economics Division analysis of Energy Information Administration/U.S. Department of Energy data.

Table 5: Average Diesel Fuel Prices (All Types)

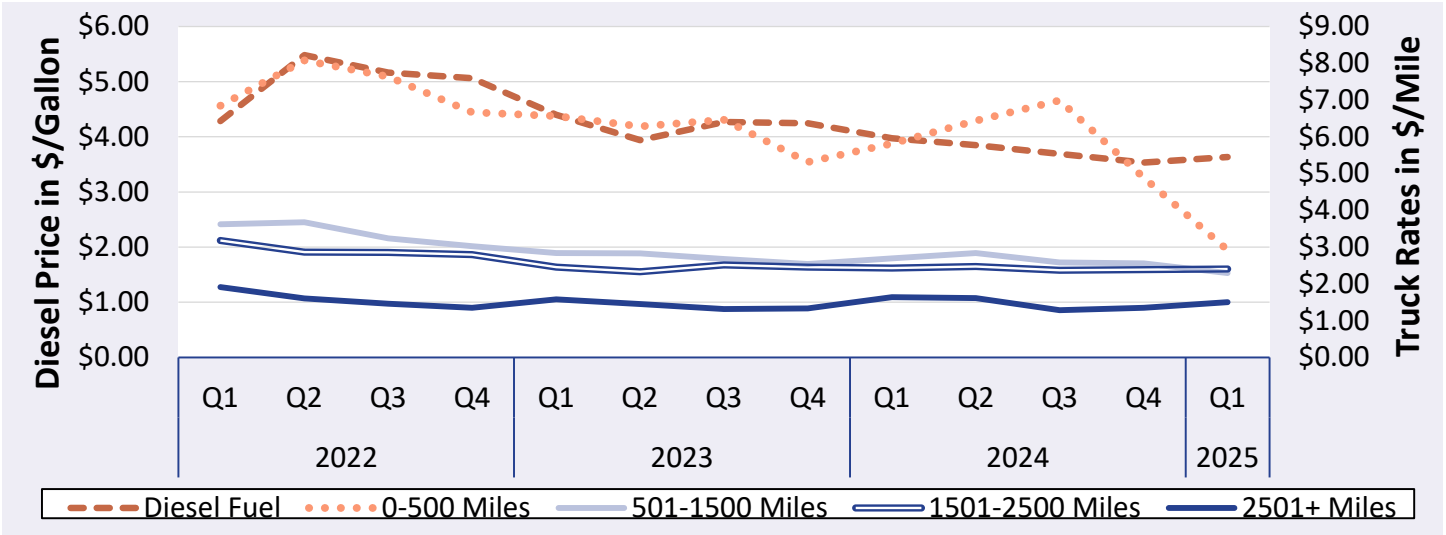
Region	1st Quarter 2025 Price $/Gallon	Change From Last Quarter	Change From Last Year
East Coast	3.74	4%	-9%
California	4.78	3%	-8%
New England	3.96	5%	-8%
Central Atlantic	3.93	4%	-8%
Lower Atlantic	3.65	5%	-9%
Gulf Coast	3.35	5%	-9%
Midwest	3.56	1%	-8%
Rocky Mountain	3.46	-1%	-11%
West Coast Except California	3.82	2%	-8%
U.S.	**3.63**	**3%**	**-9%**

Note: Table values may not conform exactly due to rounding.
Source: AMS Transportation Economics Division analysis of Energy Information Administration/U.S. Department of Energy data.

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



Note: The rates for 8 long-haul fruit and vegetable truck corridors are included in the national rates, weighted by origin volume.
Sources: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data and Energy Information Administration/U.S. Department of Energy data.

Table 6: Average Diesel Fuel Prices and Truck Rates

Year	Quarter	Diesel Fuel ($/gallon)	Truck Rates ($/mile) 501-1500 miles	% Change From			
				Last Quarter		Last Year	
				Diesel	Truck	Diesel	Truck
2025	Q1	3.63	2.30	3%	-10%	-9%	-15%
2024	Q4	3.53	2.56	-4%	-1%	-17%	1%
	Q3	3.69	2.58	-4%	-9%	-14%	-4%
	Q2	3.85	2.84	-3%	5%	-2%	< 1%
	Q1	3.97	2.69	-6%	6%	-10%	-5%
2023	Q4	4.24	2.54	-1%	-5%	-16%	-16%
	Q3	4.27	2.68	8%	-5%	-17%	-17%
	Q2	3.94	2.83	-10%	> -1%	-28%	-23%
	Q1	4.4	2.84	-13%	-6%	3%	-22%
2022	Q4	5.06	3.02	-2%	-7%	38%	-13%
	Q3	5.16	3.23	-6%	-12%	54%	1%
	Q2	5.48	3.68	28%	2%	71%	3%
	Q1	4.29	3.62	17%	4%	48%	24%

Note: Table values may not conform exactly due to rounding.
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data and Energy Information Administration/U.S. Department of Energy data.

Quarterly Truck Availability

Table 7: U.S. Fresh Fruit and Vegetable Truck Availability

Truck availability legend				
1=Surplus	2=Slight surplus	3=Adequate	4=Slight shortage	5=Shortage

California, Central, And Western Arizona	Commodities	1/7	1/14	1/21	1/28	2/4	2/11	2/18	2/25	3/4	3/11	3/18	3/25
Imperial, Coachella Valleys Ca, Central And Western Az, Mexico Crossings Through Calexico And San Luis	Celery, Sweet Corn, Bell Peppers	3	4	4	4	4	4	4	4	4	4	3	3
Kern District California	Carrots, Grapes	3	3	3	3	3	3	3	3	3	3		
Oxnard District California	Brussels Sprouts, Cabbage, Celery, Cilantro, Kale Greens, Parsley, Radishes, Spinach, Artichokes	3	3	3	3	3	3	3	3	3	3	3	3
Salinas-Watsonville California	Cabbage, Green Onions	3	3	3	3	3	3	3	3	3	3		
San Joaquin Valley California	Green Beans, Cantaloupe, Cucumbers, Eggplant, Honeydews, Bell Peppers, Acorn Squash, Butternut Squash, Kabocha Squash, Spaghetti Squash, Tomatoes, Cherry Tomatoes, Grape Tomatoes, Plum Tomatoes	5											
Santa Maria California	Broccoli, Cauliflower, Celery, Cilantro, Miscellaneous Asian Vegetables, Spinach	3	3	3	3	3	3	3	3	3	3		
South And Central District California	Blood Orange, Grapefruit, Lemons, Oranges, Tangelos	3	3	3	3	3	3	3	2	2	2	2	2

Florida	Commodities	1/7	1/14	1/21	1/28	2/4	2/11	2/18	2/25	3/4	3/11	3/18	3/25
Central And South Florida	Round Green Beans, Cabbage, Sweet Corn, Cucumbers, Eggplant, Bell Peppers, Other Peppers, Radishes, Yellow Squash Crookneck/ Straightneck, Zucchini Squash, Strawberries, Tomatoes, Cherry Tomatoes, Grape Tomatoes, Plum Tomatoes, Watermelons	3	3	3	3	4	4	3	3	3	3	3	3
Florida	Potatoes									3	3	3	3

Note: Empty cells were not reported. District and availabilities data come from the weekly Specialty Crops Truck Rate reports: https://mymarketnews.ams.usda.gov/filerepo/reports?field_slug_id_value=2375.
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.

Table 7, continued: U.S. Fresh Fruit and Vegetable Truck Availability

Truck availability legend				
1=Surplus	2=Slight surplus	3=Adequate	4=Slight shortage	5=Shortage

Great Lakes (MI & WI)	Commodities	1/7	1/14	1/21	1/28	2/4	2/11	2/18	2/25	3/4	3/11	3/18	3/25
Central Wisconsin	Dry Onions, Potatoes	3	3	3	3	3	3	3	3	3	3	3	3

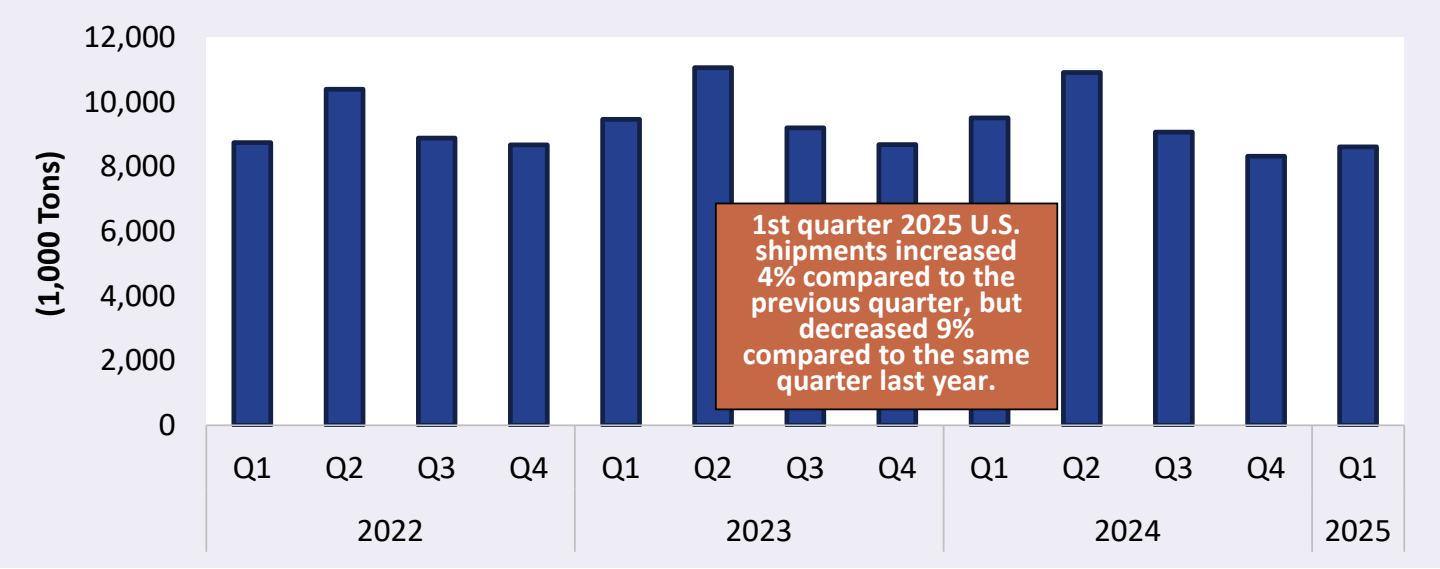
U.S.-Mexico border	Commodities	1/7	1/14	1/21	1/28	2/4	2/11	2/18	2/25	3/4	3/11	3/18	3/25
Imperial, Coachella Valleys Ca, Central And Western Az, Mexico Crossings Through Calexico And San Luis	Celery, Sweet Corn, Bell Peppers	3	4	4	4	4	4	4	4	4	4	3	3
Nogales, Arizona	Green Beans, Sweet Corn, Cucumbers, Eggplant, Mangos, Bell Peppers, Other Peppers, Acorn Squash, Butternut Squash, Grey Squash, Kabocha Squash, Spaghetti Squash, Yellow Squash Straightneck, Zucchini Squash, Tomatoes, Cherry Tomatoes, Grape Tomatoes, Plum Tomatoes, Cantaloupe, Honeydews, Watermelons	5	5	4	3	3	3	3	3	3	3	3	3
South Texas	Asparagus, Broccoli, Carrots, Chayote, Cilantro, Cucumbers, Grapefruit, Limes, Oranges, Papaya, Anaheim Peppers, Bell Peppers, Habanero Peppers, Jalapeno Peppers, Poblano Peppers, Serrano Peppers, Pineapples, Tomatillos, Tomatoes, Grape Tomatoes, Plum Tomatoes, Watermelons	4	3	3	3	3	3	1	1	1	3	3	3

Pacific Northwest (ID, OR, &, WA)	Commodities	1/7	1/14	1/21	1/28	2/4	2/11	2/18	2/25	3/4	3/11	3/18	3/25
Columbia Basin Washington	Dry Onions, Potatoes	5	5	5	3	3	3	3	3	3	3	3	3
Upper Valley, Twin Falls-Burley District Idaho	Potatoes	5	5	5	3	3	3	3	3	3	3	3	3
Yakima Valley And Wenatchee District, Washington	Apples, Pears	3	3	3	3	3	2	1	1	1	1	1	1

Note: Empty cells were not reported. District and availabilities data come from the weekly Specialty Crops Truck Rate reports: https://mymarketnews.ams.usda.gov/filerepo/reports?field_slug_id_value=2375.
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.

Reported U.S. Shipments

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



Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data. There is a delay in the California citrus data reporting and it is missing from this report.

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

Year	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter	Annual
2025	8,618				
2024	9,517	10,921	9,071	8,326	37,835
2023	9,473	11,067	9,204	8,684	38,429
2022	8,751	10,404	8,891	8,678	36,724
2021	9,742	11,265	9,334	8,749	39,091
2020	9,749	10,502	8,872	8,677	37,799
2019	9,027	9,983	8,483	8,329	35,822
2018	9,019	10,463	8,581	8,139	36,202
2017	7,706	9,369	8,279	7,873	33,228
2016	7,745	9,562	8,329	7,777	33,413
2015	7,664	9,267	7,994	7,392	32,317
2014	7,300	8,859	7,827	7,249	31,236
2013	6,948	8,821	7,718	7,051	30,537
2012	7,071	8,792	7,703	7,230	30,797
2011	6,474	8,809	7,582	7,076	29,942
2010	6,532	8,739	7,845	7,070	30,187
2009	6,646	8,530	7,653	6,902	29,732

Note: Table values may not conform exactly due to rounding. There is a delay in the California citrus data reporting and it is missing from this report.
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.

Reported Shipments by Select Commodities

Table 9: Reported Top 10 Commodity Shipments (1,000 Tons)

Commodity	1st Quarter 2025	Previous Quarter	Same Quarter Last Year	Current Quarter as % change from:	
				Previous Qtr	Same Qtr Last Year
Potatoes	1,136	1,186	1,168	-4%	-3%
Lettuce, Processed	694	< 1	87	-	698%
Apples	679	722	706	-6%	-4%
Onions, Dry	621	591	602	5%	3%
Strawberries	376	225	343	67%	9%
Cucumbers	372	340	348	9%	7%
Tomatoes, Plum Type	359	309	323	16%	11%
Peppers, Bell Type	357	243	335	47%	6%
Avocados	333	334	385	> -1%	-13%
Tomatoes	327	311	324	5%	1%

Note: Table values may not conform exactly due to rounding. There is a delay in the California citrus data reporting and it is missing from this report.
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.

Table 10: Reported Top 10 Regions (1,000 Tons)

Origin	1st Quarter 2025 Volume	% Change from Last Quarter	% Change From Same Quarter Last Year
Mexico	3,514	29%	0%
PNW	1,577	-8%	-4%
Arizona	1,284	298%	88%
Florida	641	259%	8%
California	465	-75%	-76%
Canada	355	-37%	11%
Colorado	220	-9%	10%
Great Lakes	185	-21%	-18%
Texas	96	2%	-1%
New York	78	-29%	-14%

Note: The Regional Markets section of this report excludes Canada, because it lacks rate and availability data. Table values may not conform exactly due to rounding. Any "-" in the table indicates no reported shipments during the quarter or a percentage change with an at- or near-zero denominator. There is a delay in the California citrus data reporting and it is missing from this report.
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.

Regional Markets

U.S. Mexico Border

Volume

Total reported shipments of fruit and vegetables from Mexico in first quarter 2025 were 3.51 million tons, up 2 percent from first quarter 2024 (year to year). The summed volume of the top five commodities shipped from the U.S. Mexico border decreased less than 1 percent year to year. Three of the top five commodities show year-to-year increases. Shipments of tomatoes and avocados decreased 6 percent and 18 percent, respectively. Shipments of cucumbers, bell peppers, and plum tomatoes showed increases of 4 percent, 8 percent, and 10 percent, respectively.

Rates

In first quarter 2025, truck rates for shipments between 501 miles and 1,500 miles from Arizona-Mexico border crossings averaged $2.92 per mile—down 6 percent quarter to quarter and up 3 percent year to year. Rates for shipments between 501 miles and 1,500 miles from Texas-Mexico border crossings averaged $2.87 per mile—up 16 percent quarter to quarter and up 9 percent year to year.

Truck Overview

Diesel fuel prices for border crossings from Arizona averaged $3.82 per gallon—up 2 percent quarter to quarter and down 8 percent year to year. Diesel fuel prices for border crossings from Texas averaged $3.35—up 5 percent quarter to quarter and down 9 percent year to year. Mexico crossings through Calexico and San Luis reported adequate truck availability in January and March and a slight shortage in February. Mexico crossings through Nogales, AZ, reported a slight truck shortage in January and adequate truck availability in February and March. Mexico crossings through South Texas reported adequate truck availability in January and a slight surplus of trucks in February and March.

Table 11: Reported Top Five Commodities Shipped from Mexico (1,000 tons)

Commodity	1st Quarter 2025	Share of Mexico Total	Previous Quarter	Same Quarter Last Year	Current Quarter as % change from:	
					Previous Qtr	Same Qtr Last Year
Tomatoes, Plum Type	309	9%	270	281	15%	10%
Avocados	308	9%	328	373	-6%	-18%
Cucumbers	302	9%	249	290	21%	4%
Peppers, Bell Type	285	8%	134	263	114%	8%
Tomatoes	189	5%	173	201	9%	-6%
Top 5 Total	**1,393**	**40%**	**1,154**	**1,409**	**21%**	**-1%**
Mexico Total	**3,514**	**100%**	**2,729**	**3,515**	**29%**	**> -1%**

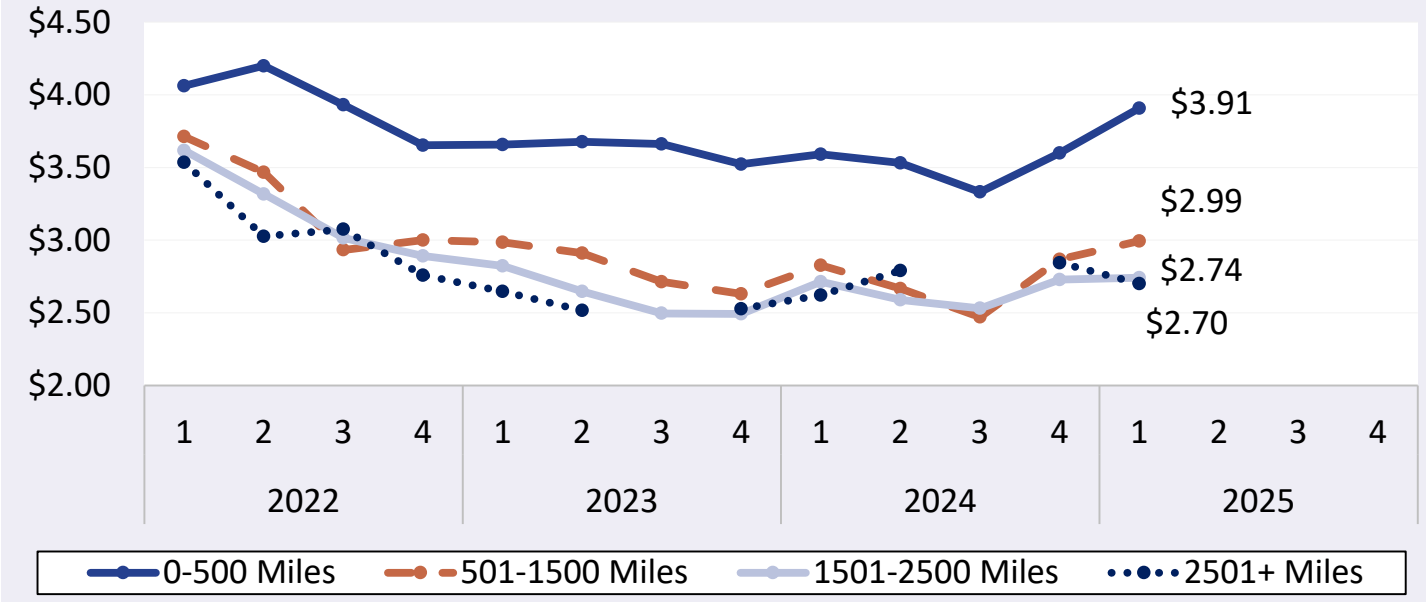
Note: Any "-" in the table indicates no reported shipments during the quarter or a percentage change with an at- or near-zero denominator. Table values may not conform exactly due to rounding.
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.

Table 12: Top 5 Commodities Shipped to U.S. from Mexico by State of Entry (1,000 tons)

Texas		California		Arizona		New Mexico	
Commodity	1st Quarter 2025	Commodity	1st Quarter 2025	Commodity	1st Quarter 2025	Commodity	1st Quarter 2025
Avocados	302	Strawberries	54	Cucumbers	189	Peppers, Anaheim	13
Limes	145	Onions, Green	47	Peppers, Bell Type	176	Peppers, Other	10
Tomatoes, Plum Type	145	Asparagus	43	Tomatoes, Plum Type	142	Peppers, Jalapeno	6
Strawberries	128	Lettuce, Romaine	28	Watermelons	69	Tomatillos	2
Tomatoes	115	Brussels Sprouts	23	Tomatoes	68	Watermelons	1
Mexico through TX Total	**1,916**	**Mexico through CA Total**	**524**	**Mexico through AZ Total**	**1,041**	**Mexico through NM Total**	**12,132**

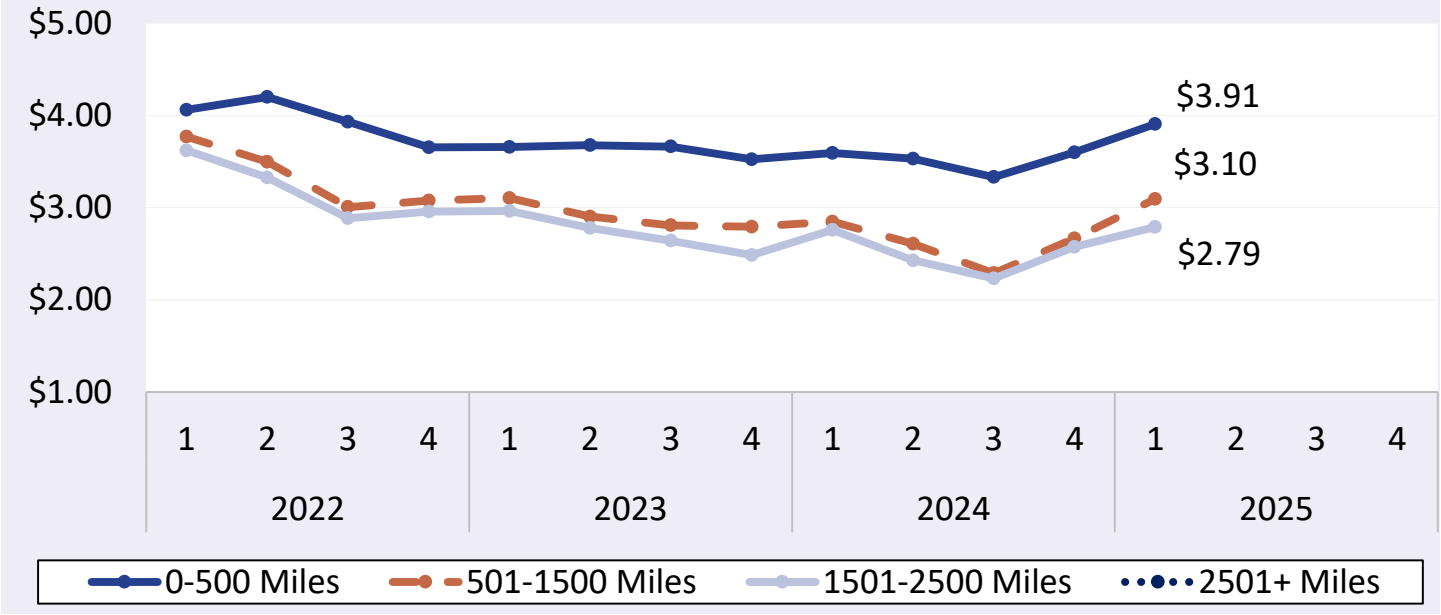
Note: Table values may not conform exactly due to rounding. Any "-" in the table indicates no reported shipments during the quarter.
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.

Figure 5: Truck Rates from U.S.-Mexico Border ($/Mile by Distance Traveled)



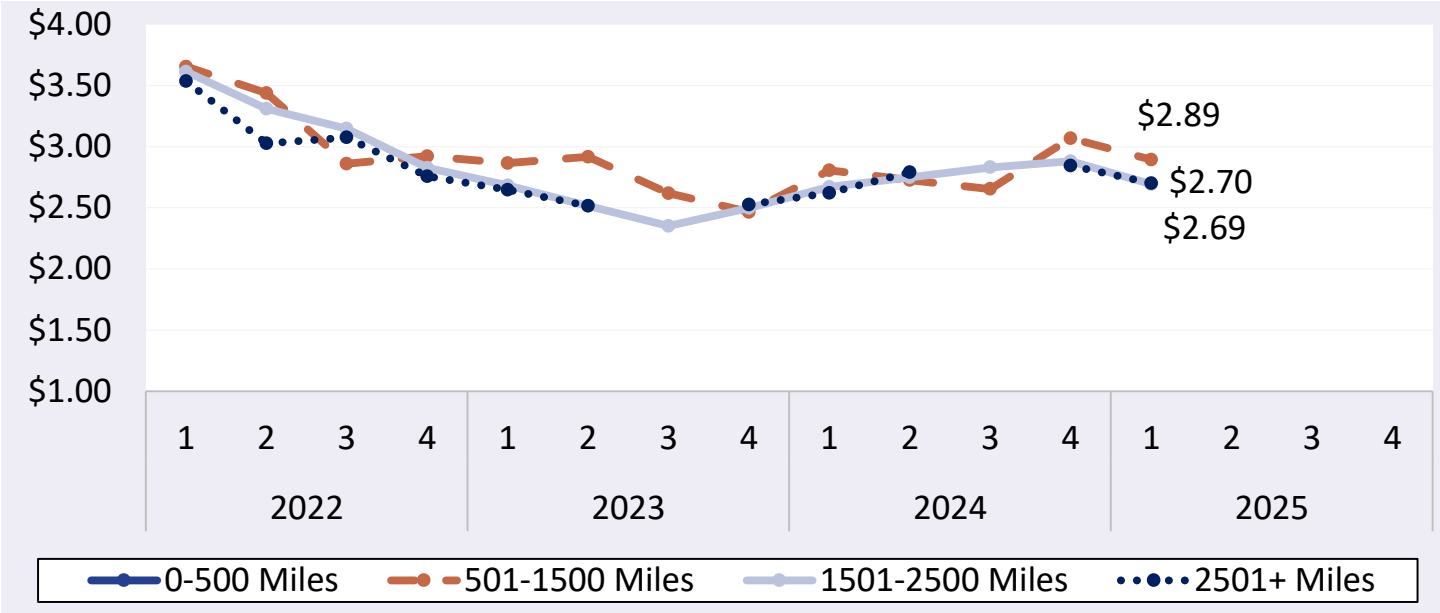
Note: Any gaps in the chart lines are the result of quarters with no reported data for the region.
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.

Figure 6: Texas Truck Rates from U.S.-Mexico Border ($/Mile by Distance Traveled)



Note: Any gaps in the chart lines are the result of quarters with no reported data for the region.
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.

Figure 7: Arizona Truck Rates from U.S.-Mexico Border ($/Mile by Distance Traveled)



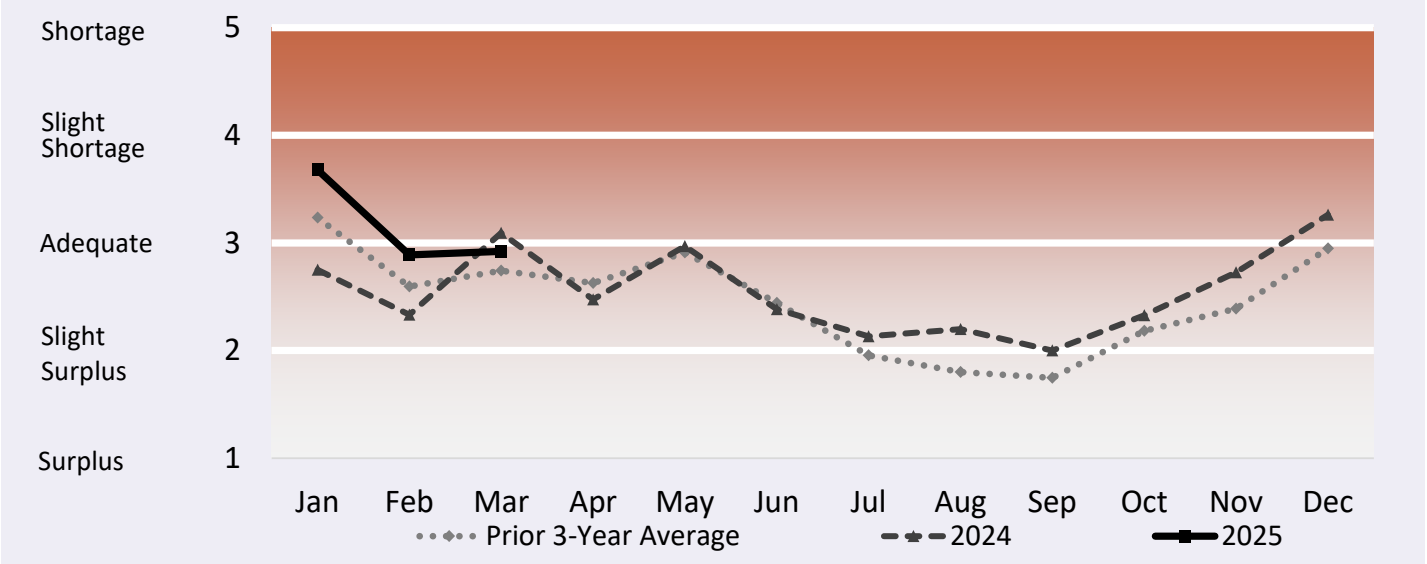
Note: Any gaps in the chart lines are the result of quarters with no reported data for the region.
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.

Table 13: Truck Overview from the U.S.-Mexico Border (Availability Rating: 1=Surplus to 5=Shortage)

Region/Reporting District	January	February	March	1st Quarter
Imperial, Coachella Valleys Ca, Central And Western Az, Mexico Crossings Through Calexico And San Luis	3.5	3.67	3.33	3.5
Mexico Crossings Through Nogales, Arizona	4.16	3	3	3.39
Mexico Crossings Through South Texas	3.29	2	2.43	2.57
Regional Average Availability	3.65	2.89	2.92	3.15
Diesel Fuel Price ($/gallon), through Texas	**3.36**	**3.40**	**3.28**	**3.35**
Diesel Fuel Price ($/gallon), through Arizona	**3.80**	**3.88**	**3.78**	**3.82**

Note: AMS Specialty Crops Program defines regions by commodity, which may overlap in truck availability reporting. Table values may not conform exactly due to rounding. Any "-" in the table indicates no reported shipments during the quarter.
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.

Figure 8: Refrigerated Truck Availability Monthly Ratings from the U.S-Mexico Border



Note: Any gaps in the chart lines are the result of quarters with no reported data for the region.
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.

PNW

Volume

In first quarter 2025, total reported shipments of fruit and vegetables from the Pacific Northwest (PNW) were 1.58 million tons, down 4 percent year to year. The summed volume of the top four commodities shipped from the PNW also decreased 4 percent year to year. All the top four commodities saw year-to-year volume decreases, including potatoes (down 1 percent); dry onions (down 2 percent); apples (down 3 percent); and pears (down 27 percent).

Rates

The quarterly average truck rate for shipments between 501 miles and 1,500 miles was $2.82 per mile—up 11 percent quarter to quarter and down 15 percent year to year.

Truck Overview

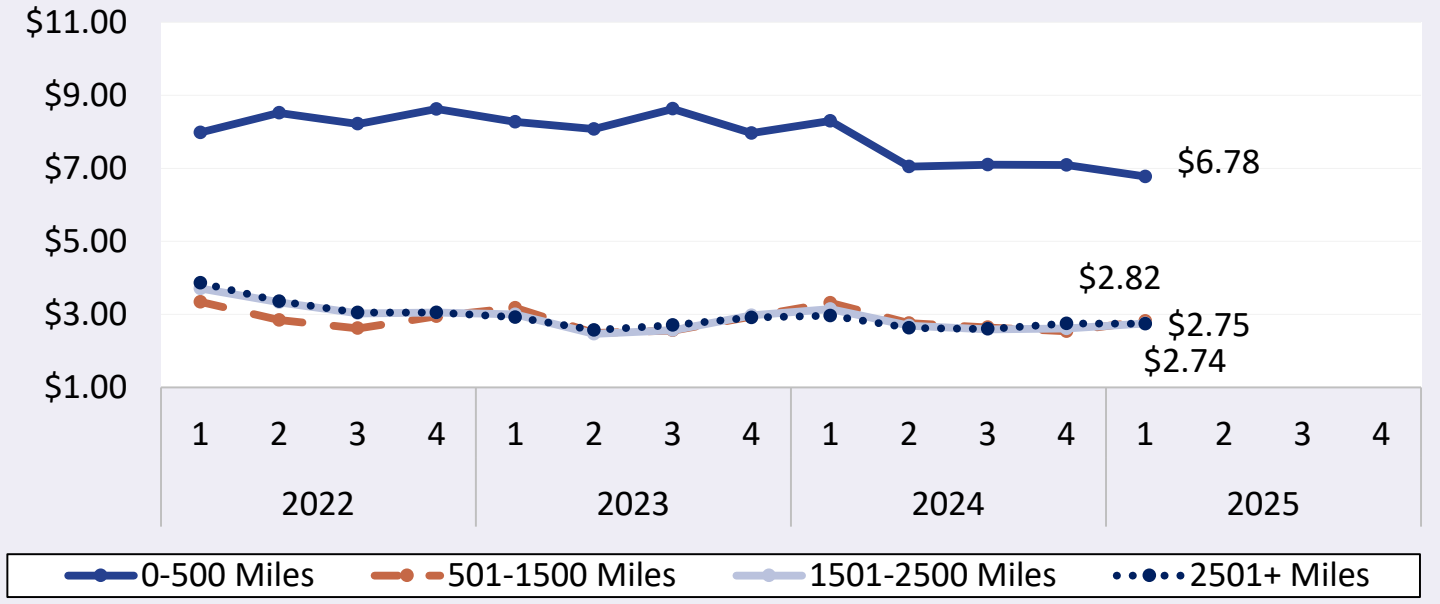
Diesel fuel prices averaged $3.82 per gallon—up 2 percent quarter to quarter and down 8 percent year to year. Columbia Basin and Upper Valley both reported a shortage of trucks in January and adequate truck availability in February and March. Yakima Valley reported adequate availability in January, adequate availability in February, and a surplus in March.

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

Commodity	1st Quarter 2025	Share of PNW Total	Previous Quarter	Same Quarter Last Year	Current Quarter as % change from:	
					Previous Qtr	Same Qtr Last Year
Apples	544	35%	571	562	-5%	-3%
Potatoes	509	32%	534	515	-5%	-1%
Onions, Dry	439	28%	476	449	-8%	-2%
Pears	85	5%	125	117	-32%	-27%
-	-	-	-	-	-	-
Top 5 Total	**1,577**	**100%**	**1,706**	**1,643**	**-8%**	**-4%**
PNW Total	**1,577**	**100%**	**1,707**	**1,643**	**-8%**	**-4%**

Note: Any "-" in the table indicates no reported shipments during the quarter or a percentage change with an at- or near-zero denominator. Table values may not conform exactly due to rounding.
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.

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



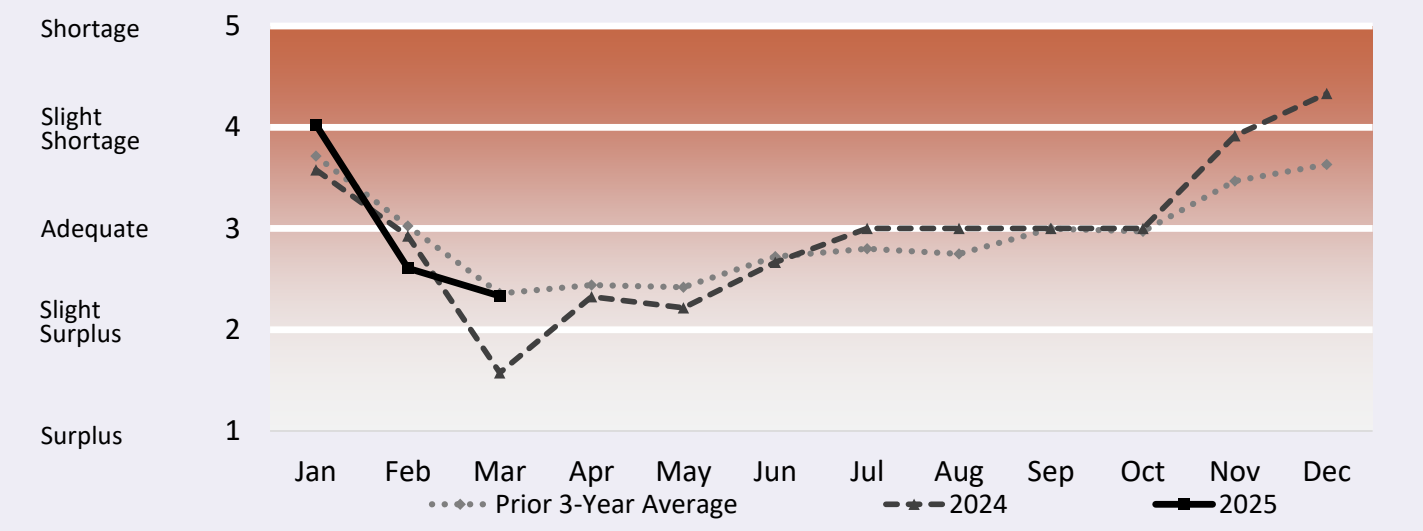
Note: Any gaps in the chart lines are the result of quarters with no reported data for the region.
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.

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

Region/Reporting District	January	February	March	1st Quarter
Columbia Basin Washington	4.57	3.08	3	3.55
Upper Valley, Twin Falls-Burley District Idaho	4.5	3	3	3.5
Yakima Valley And Wenatchee District, Washington	3	1.77	1	1.92
Regional Average Availability	4.02	2.62	2.33	2.99
Diesel Fuel Price ($/gallon)	**3.80**	**3.88**	**3.78**	**3.82**

Note: AMS Specialty Crops Program defines regions by commodity, which may overlap in truck availability reporting. Table values may not conform exactly due to rounding. Any "-" in the table indicates no reported shipments during the quarter.
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.

Figure 10: Refrigerated Truck Availability Monthly Ratings for PNW



Note: Any gaps in the chart lines are the result of quarters with no reported data for the region.
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.

Arizona

Volume

During first quarter 2025, total reported shipments of fruit and vegetables from Arizona were 1.28 million tons—up 88 percent year to year. The summed volume of the top five commodities shipped from Arizona also increased 110 percent year to year. Four of the top five commodities saw year-to-year volume increases in the first quarter, including romaine lettuce (up 1 percent); cauliflower (up 7 percent); celery (up 10 percent); and processed lettuce (up 698 percent). Shipments of iceberg lettuce decreased 4 percent.

Rates

There were no rates reported for Arizona in the first quarter.

Truck Overview

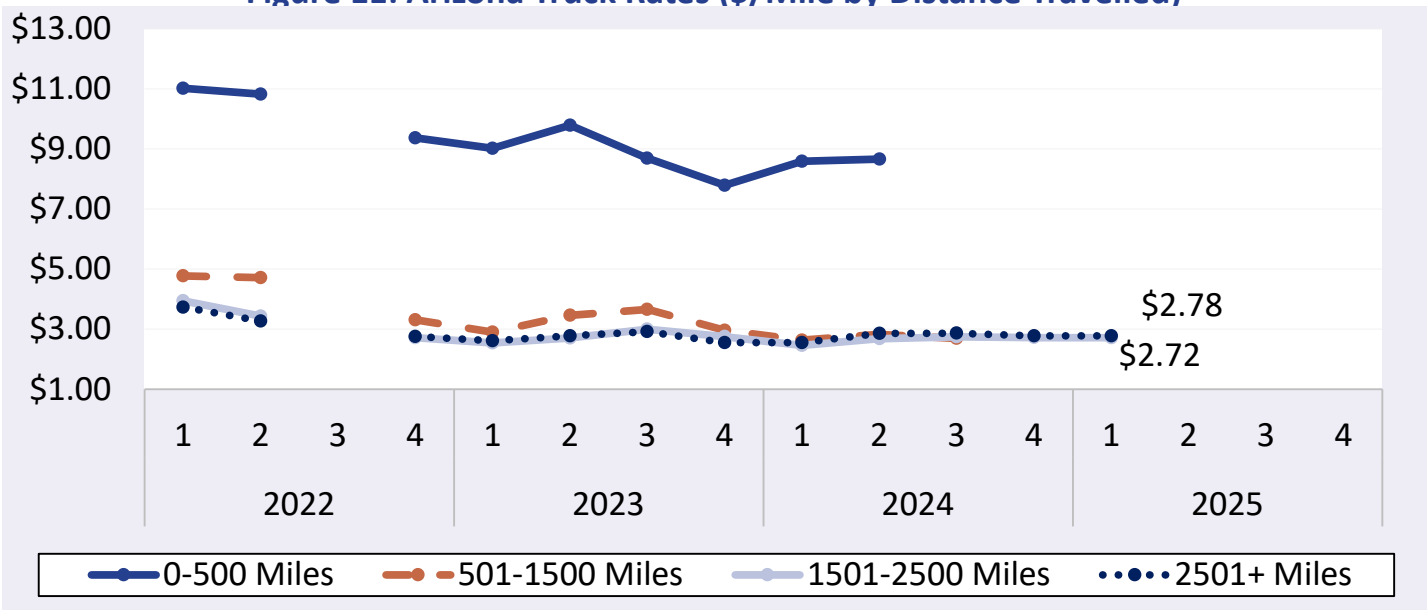
Diesel fuel prices averaged $3.82 per gallon—up 2 percent quarter to quarter and down 8 percent year to year. Mexico crossings through Calexico and San Luis reported adequate truck availability in January and March and a slight shortage in February.

Table 16: Reported Top Five Commodities Shipped from Arizona (1,000 tons)

Commodity	1st Quarter 2025	Share of Arizona Total	Previous Quarter	Same Quarter Last Year	Current Quarter as % change from:	
					Previous Qtr	Same Qtr Last Year
Lettuce, Processed	694	54%	-	87	-	698%
Lettuce, Romaine	188	15%	101	187	87%	1%
Lettuce, Iceberg	179	14%	108	187	66%	-4%
Celery	66	5%	3	60	2,150%	10%
Cauliflower	37	3%	9	34	297%	7%
Top 5 Total	**1,164**	**91%**	**221**	**555**	**426%**	**110%**
Arizona Total	**1,284**	**100%**	**322**	**683**	**298%**	**88%**

Note: Any "-" in the table indicates no reported shipments during the quarter or a percentage change with an at- or near-zero denominator. Table values may not conform exactly due to rounding.
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.

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



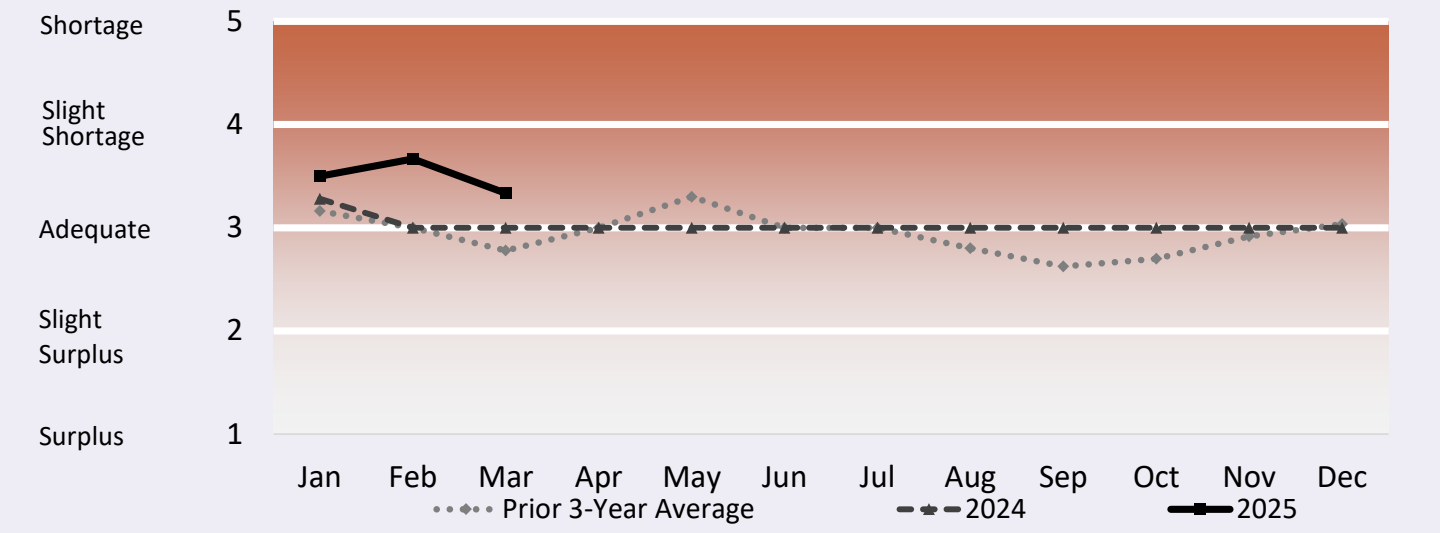
Note: Any gaps in the chart lines are the result of quarters with no reported data for the region.
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.

Table 17: Arizona Truck Overview (Availability Rating: 1=Surplus to 5=Shortage)

Region/Reporting District	January	February	March	1st Quarter
Imperial, Coachella Valleys Ca, Central And Western Az, Mexico Crossings Through Calexico And San Luis	3.5	3.67	3.33	3.5
Regional Average Availability	3.5	3.67	3.33	3.5
Diesel Fuel Price ($/gallon)	**3.80**	**3.88**	**3.78**	**3.82**

Note: AMS Specialty Crops Program defines regions by commodity, which may overlap in truck availability reporting. Table values may not conform exactly due to rounding. Any "-" in the table indicates no reported shipments during the quarter.
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.

Figure 12: Refrigerated Truck Availability Monthly Ratings for Arizona



Note: Any gaps in the chart lines are the result of quarters with no reported data for the region.
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.

Florida

Volume

During first quarter 2025, total reported shipments of fruit and vegetables from Florida were 641,000 tons—up 8 percent year to year. The summed volume of the top five commodities shipped from Florida also increased 12 percent year to year. Four of the top five commodities saw year-to-year volume increases in the first quarter, including cabbage (up 9 percent); strawberries (up 11 percent); tomatoes (up 14 percent); and sweet corn (up 28 percent). Shipments of bell peppers decreased 5 percent.

Rates

The quarterly average truck rate for shipments between 501 miles and 1,500 miles was $2.44 per mile—up 24 percent quarter to quarter and up 5 percent year to year.

Truck Overview

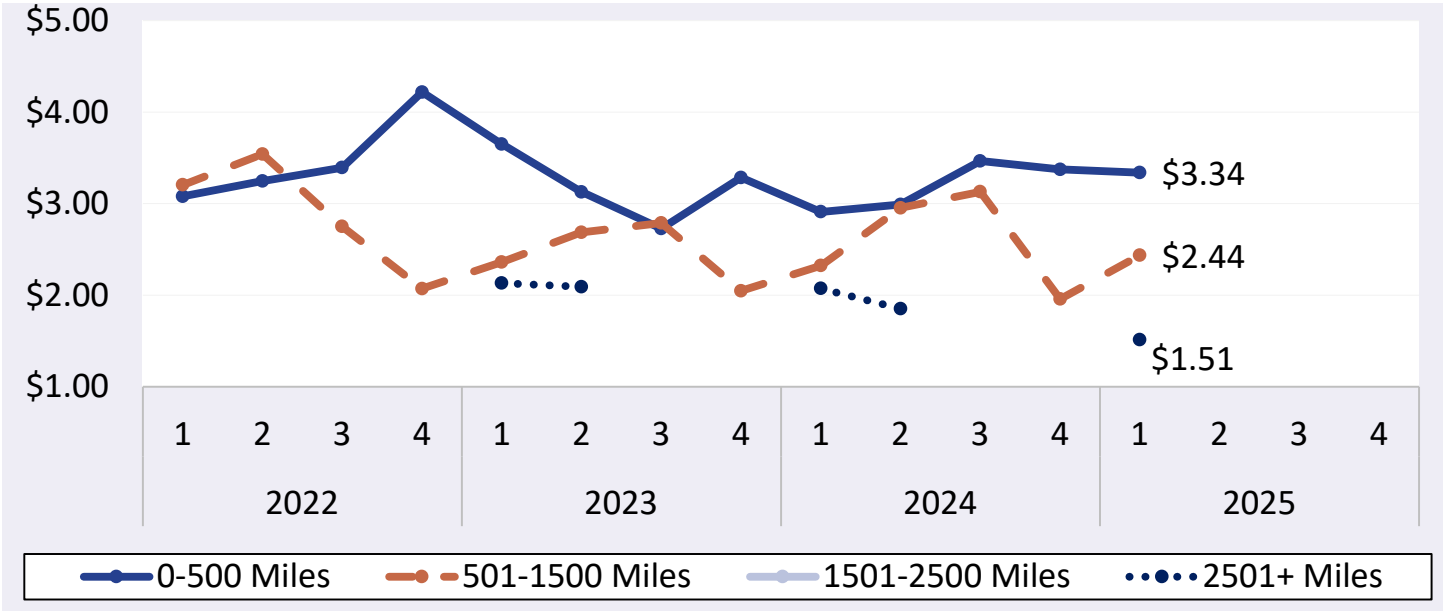
Diesel fuel prices averaged $3.65 per gallon—up 5 percent quarter to quarter and down 9 percent year to year. The Central and South Florida district reported adequate availability throughout the quarter. The Florida district did not report in January and February and reported adequate availability in March.

Table 18: Reported Top Five Commodities Shipped from Florida (1,000 tons)

Commodity	1st Quarter 2025	Share of Florida Total	Previous Quarter	Same Quarter Last Year	Current Quarter as % change from:	
					Previous Qtr	Same Qtr Last Year
Strawberries	119	19%	19	107	514%	11%
Tomatoes	100	16%	30	87	235%	14%
Cabbage	76	12%	5	70	1,486%	9%
Corn, Sweet	66	10%	11	52	490%	28%
Peppers, Bell Type	48	8%	12	51	288%	-5%
Top 5 Total	**410**	**64%**	**78**	**367**	**427%**	**12%**
Florida Total	**641**	**100%**	**179**	**594**	**259%**	**8%**

Note: Any "-" in the table indicates no reported shipments during the quarter or a percentage change with an at- or near-zero denominator. Table values may not conform exactly due to rounding.
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.

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



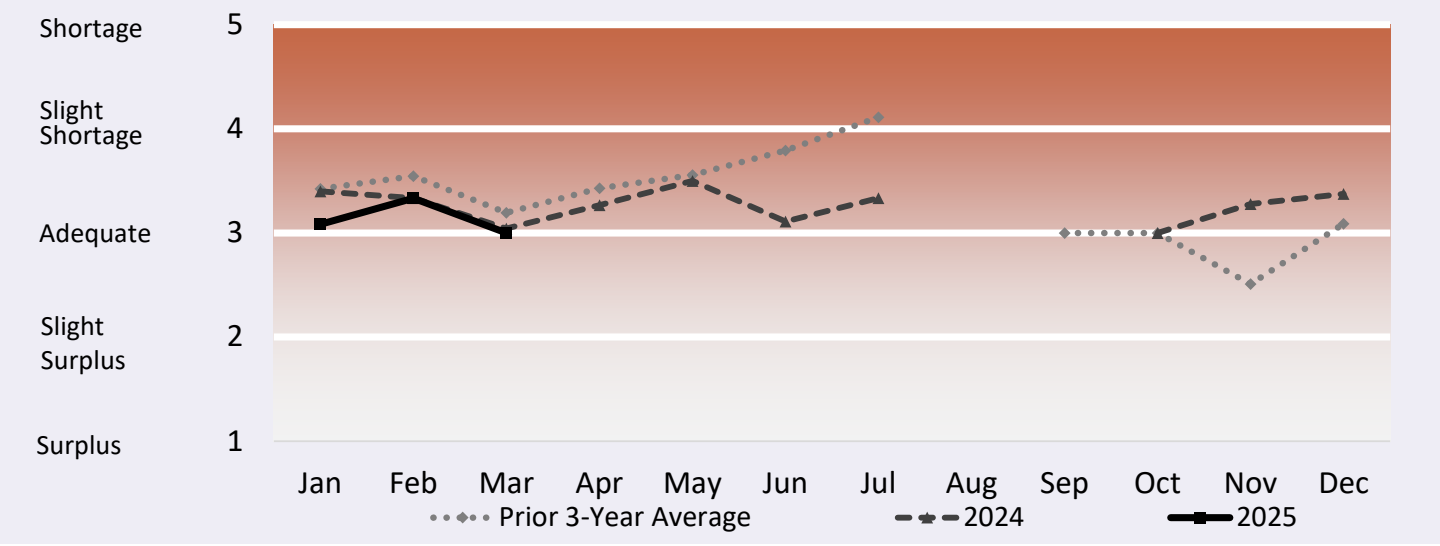
Note: Any gaps in the chart lines are the result of quarters with no reported data for the region.
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.

Table 19: Florida Truck Overview (Availability Rating: 1=Surplus to 5=Shortage)

Region/Reporting District	January	February	March	1st Quarter
Central And South Florida	3.08	3.33	3	3.14
Florida	-	-	3	3
Regional Average Availability	3.08	3.33	3	3.14
Diesel Fuel Price ($/gallon)	**3.67**	**3.69**	**3.60**	**3.65**

Note: AMS Specialty Crops Program defines regions by commodity, which may overlap in truck availability reporting. Table values may not conform exactly due to rounding. Any "-" in the table indicates no reported shipments during the quarter.
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.

Figure 14: Refrigerated Truck Availability Monthly Ratings for Florida



Note: Any gaps in the chart lines are the result of quarters with no reported data for the region.
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.

California

Volume

In first quarter 2025, USDA reported total shipments of fruit and vegetables from California were 465,000 tons—down 76 percent year to year. However, as of the date of publication, there is a delay in the reporting of California citrus movements, which is missing from this report. The data is expected to be included in the second quarter report. The summed volume of the top five commodities shipped from California increased 2 percent year to year. Four of the top five commodities saw year-to-year volume increases, including iceberg lettuce (up 1 percent); strawberries (up 2 percent); celery (up 4 percent) and potatoes (up 7 percent). Shipments of romaine lettuce decreased 4 percent.

Rates

The quarterly average truck rate for shipments between 501 miles and 1,500 miles was $2.85 per mile—down 16 percent quarter to quarter and down 7 percent year to year.

Truck Overview

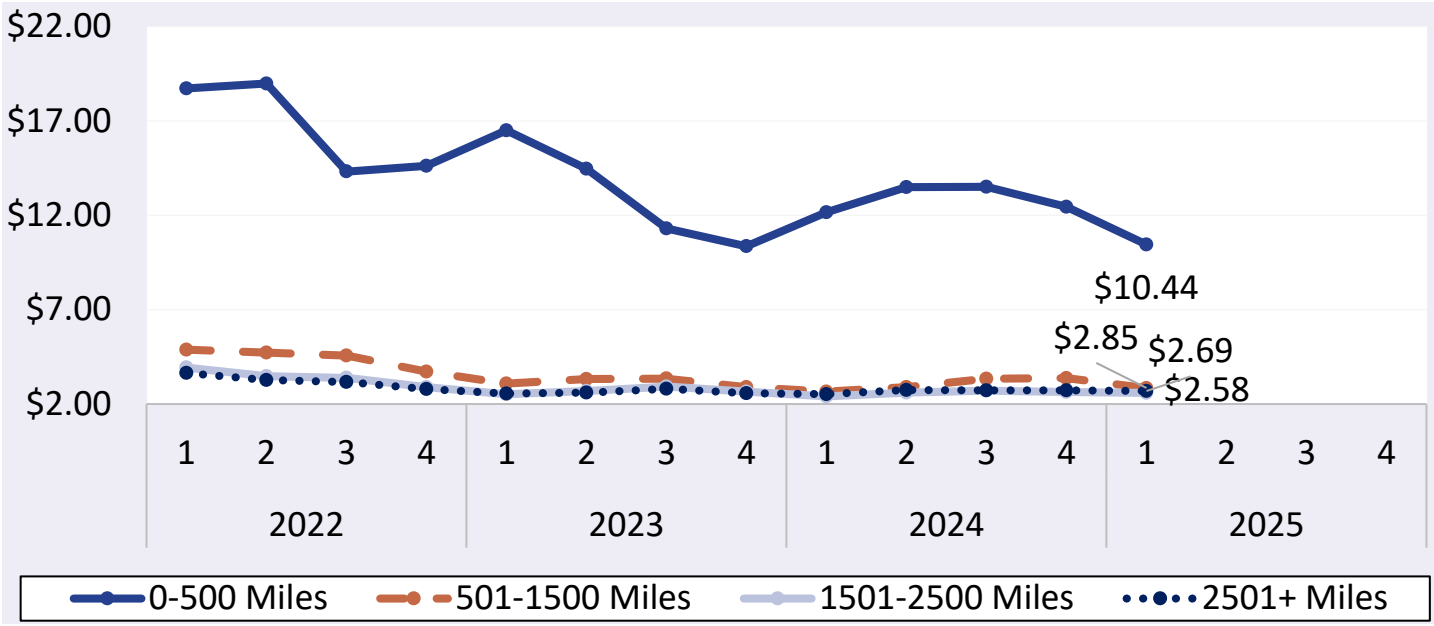
Diesel fuel prices averaged $4.78 per gallon—up 3 percent quarter to quarter and down 8 percent year to year. The San Joaquin Valley reported a truck shortage in January and did not report in February and March. All other districts reported adequate truck availability throughout the quarter.

Table 20: Reported Top Five Commodities Shipped from California (1,000 tons)

Commodity	1st Quarter 2025	Share of California Total	Previous Quarter	Same Quarter Last Year	Current Quarter as % change from:	
					Previous Qtr	Same Qtr Last Year
Celery	91	19%	181	87	-50%	4%
Strawberries	73	16%	158	72	-54%	2%
Lettuce, Romaine	52	11%	121	54	-57%	-4%
Lettuce, Iceberg	42	9%	125	41	-67%	1%
Potatoes	41	9%	37	39	13%	7%
Top 5 Total	**299**	**64%**	**621**	**293**	**-52%**	**2%**
California Total	**465**	**100%**	**1,830**	**1,937**	**-75%**	**-76%**

Note: Any "-" in the table indicates no reported shipments during the quarter or a percentage change with an at- or near-zero denominator. Table values may not conform exactly due to rounding. There is a delay in the California citrus data reporting and it is missing from this report.
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.

Figure 15: California Truck Rates ($/Mile by Distance Travelled)



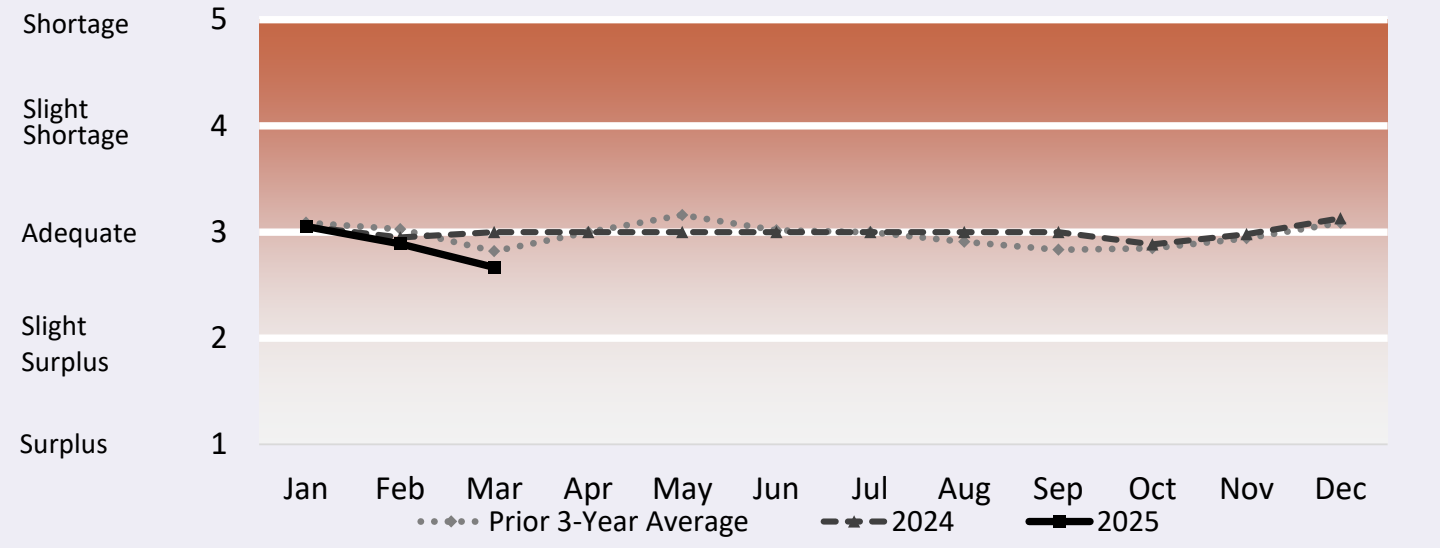
Note: Any gaps in the chart lines are the result of quarters with no reported data for the region.
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.

Table 21: California Truck Overview (Availability Rating: 1=Surplus to 5=Shortage)

Region/Reporting District	January	February	March	1st Quarter
Kern District California	3	3	3	3
Oxnard District California	3	3	3	3
Salinas-Watsonville California	3	3	3	3
San Joaquin Valley California	5	-	-	5
Santa Maria California	2.82	2.67	2.67	2.72
South And Central District California	3	2.78	2	2.59
Regional Average Availability	3.30	2.89	2.73	2.98
Diesel Fuel Price ($/gallon)	**4.73**	**4.83**	**4.80**	**4.78**

Note: AMS Specialty Crops Program defines regions by commodity, which may overlap in truck availability reporting. Table values may not conform exactly due to rounding. Any "-" in the table indicates no reported shipments during the quarter.
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.

Figure 16: Refrigerated Truck Availability Monthly Ratings for California



Note: Any gaps in the chart lines are the result of quarters with no reported data for the region.
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.

Additional Information

Terms and References

Data Reporting and Publication Window

The publication date of each Agricultural Refrigerated Truck Quarterly (AgRTQ) depends on the timing of data reporting. Reporting of truck shipments in some regions can be delayed 2-3 months past their respective quarter. We publish the AgRTQ one month after that lag in order to capture a more complete picture of truck shipments during the quarter.

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.

Contact Us

Authors

Kranti Mulik, Analyst
Kranti.Mulik@usda.gov, 202.756.2577

Peter Caffarelli, Analyst
PeterA.Caffarelli@usda.gov, 202.690.3244

Jesse Gastelle, Analyst
Jesse.Gastelle@usda.gov, 202.690.1144

Francine Vigliotti, Specialty Crops Program and Market News Division Data
francine.vigliotti@usda.gov, 202.720.9938

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Related Websites

USDA's Agricultural Transportation Open Data Platform
https://agtransport.usda.gov/

Specialty Crops Program
https://www.ams.usda.gov/about-ams/programs-offices/specialty-crops-program

Specialty Crops Truck Rate Report
https://mymarketnews.ams.usda.gov/filerepo/reports?field_slug_id_value=2375

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