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Agricultural Refrigerated Truck Quarterly

a quarterly publication of the Agricultural Marketing Service

Contents

Quarterly Overview

Fruit and Vegetable Shipments

During the second quarter of 2019, reported U.S. truck shipments of fresh produce were 10.6 million tons, 11 percent higher than the previous quarter, but 2 percent lower than the same quarter last year.

Also, in the second quarter, shipments from Mexico were higher than those from any other origin, totaling 3.05 million tons and accounting for 29 percent of the total reported shipments of fresh fruits and vegetables. Movements from California totaled 3.02 million tons, representing 28 percent of the reported total. Shipments from the Pacific Northwest totaled 1.5 million tons, representing 14 percent of the reported shipments.

These top five commodities accounted for 41 percent of the reported truck movements during the second quarter of 2019:

- Watermelon, seedless (12 percent)
- Potatoes (10 percent)
- Apples (6 percent)
- Oranges (6 percent)
- Onions, dry (6 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 2,500+ miles. Please note the U.S. average truck rates provided below were calculated using weighted regional rates and volumes.

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

	0-500 miles	501-1,500 miles	1,501-2,500 miles	2,501+ miles
Q2 2018	4.36	2.99	2.50	1.26
Q3 2018	5.14	2.74	2.72	1.62
Q4 2018	3.35	2.84	2.67	1.54
Q1 2019	2.90	2.59	2.46	1.28
Q2 2019	2.88	2.59	2.13	1.19
Q2 Change from Previous Quarter	-1%	-0%	-13%	-6%
Q2 Change from Same Quarter Last Year	-34%	-13%	-15%	-5%

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

Diesel Fuel

During the second quarter 2019, the U.S. diesel fuel price averaged $3.12 per gallon—4 percent higher than the previous quarter, but 2 percent lower than the same quarter last year.

Regulatory News and Updates

Extension of Compliance Date for Entry Level Driver Training

On January 29, the Federal Motor Carrier Safety Administration (FMCSA) announced its interim final rule on extending the compliance date of the Entry Level Driver Training Final Rule from February 7, 2020, to February 7, 2022. FMCSA proposed the extension on July 18, 2019. Comments can be viewed at docket number FMCSA-2007-27748.

Preliminary Injunction on Enforcement of California Assembly Bill 5 on Truck Drivers

On January 16, 2020, U.S. District Court Judge Roger T. Benitez granted a preliminary injunction, which prevents the enforcement of Assembly Bill 5 (AB-5). AB-5 prohibits companies from using independent contractors unless their work is "outside the usual course of the hiring entity's business." Trucking is an important mode in the movement of agricultural products, especially in California. According to U.S. Department of Transportation data, California truckers hauled nearly 49 million tons of agricultural products (SCTG03, which includes soybeans, fruits, vegetables, nuts, and other agricultural products) and over 4 million tons of cereal grain (SCTG02, which includes corn, wheat, and other small grains) within the State in 2018. California also distributed almost 8 million tons of agricultural products and cereal grains to other States by truck in the same year.

EPA Administrator Wheeler Requests Comments on the Cleaner Trucks Initiative

On January 6, 2020, Environmental Protection Agency (EPA) Administrator Andrew Wheeler requested input on the Cleaner Trucks Initiative (CTI), first announced November 13, 2018, to further decrease nitrogen oxide (NOx) emissions from on-highway heavy-duty trucks and engines. EPA seeks to improve engine certification procedures as well. Comments on the Advanced Notice of Proposed Rulemaking can be viewed at docket number EPA-HQ-OAR-2019-0055.

FMCSA Raises Random-Testing Rate for Controlled Substances to 50 Percent of Drivers in 2020

On December 27, 2019 FMCSA announced the increase of the minimum annual percentage rate for random testing of controlled substances for drivers of commercial motor vehicles. Effective for calendar year 2020, the rate increased from 25 percent of the average number of driver positions to 50 percent. The FMCSA Administrator must increase the random-testing rate whenever the data for the previous calendar year show that 1.0 percent or more of drivers tested had positive test results.

DOT Requests Information for the National Freight Strategic Plan

On December 27, 2019, the U.S. Department of Transportation (DOT) requested answers to 10 questions to aid in the development of the National Freight Strategic Plan (NFSP). The plan includes 11 components to address multimodal freight transportation. Answers to the questions can be viewed at docket number DOT-OST-2019-0184. The draft NFSP and comments can be viewed at docket number DOT-OST-2015-0248.

DOT Requests Feedback on Rural Transportation Needs and Opportunities

On December 19, 2019, DOT announced a request for information (RFI) from the public and stakeholders regarding the safety, condition, and use of rural infrastructure, as well as stakeholders' experiences using DOT discretionary grant and finance programs. The RFI is part of the Rural Opportunities to Use Transportation for Economic Success Initiative (ROUTES), and the public feedback will be reviewed and used by the ROUTES Council to

aid evaluation of rural projects and improve funding options. Comments can be viewed at docket number DOT-OST-2019-0167.

DOT Extends the Date for States To Check a Driver's Record in the Drug and Alcohol Clearinghouse

On December 13, 2019, FMCSA announced a delay in States' requirements to check a driver's record for violations in the Commercial Driver's License (CDL) Drug and Alcohol Clearinghouse, moving the deadline from January 6, 2020, to January 6, 2023. FMCSA will use the additional time to issue a rulemaking to the address the concerns of the American Association of Motor Vehicle Administrators. States may voluntarily use the Clearinghouse prior to issuing, renewing, upgrading, or transferring a CDL. Comments can be viewed at docket number FMCSA-2019-0120.

DOT Requests Input for the Non-Traditional and Emerging Transportation Technology Council

On November 26, 2019, DOT requested comments on "projects, issues, or topics" that the agency should consider through its Non-Traditional and Emerging Transportation Technology (NETT) Council, including "regulatory models and other alternative approaches for non-traditional and emerging transportation technologies." The NETT Council, established in April 2019, is tasked with identifying and resolving "jurisdictional and regulatory gaps associated with non-traditional and emerging transportation projects pending before DOT, including with respect to safety oversight, environmental review, and funding issues." Comments can be viewed at docket number DOT-OST-2019-0165.

Definition of "Agricultural Commodity" Is Under Long-Term Development by FMCSA

On November 20, 2019, Federal Motor Carrier Safety Administration (FMCSA) announced that it did not expect to be able redefine within 12 months the term "agricultural commodity." Currently listed as a "long-term action," the redefinition process would clarify an exemption to hours of service (HOS) of drivers who transport agricultural commodities. Currently, during harvesting and planting seasons as determined by each State, drivers transporting agricultural commodities, including livestock, are exempt from the HOS requirements from the origin of the commodities to a destination within a 150-air-mile radius from the origin. However, FMCSA has received indications that these terms may be misunderstood or inconsistently enforced when determining whether the HOS exemption applies. Comments on the proposed rulemaking ended on September 27 and can be viewed at docket number FMCSA-2018-0348.

Protecting Perishable Foods During Transport by Truck and Rail (Summary)

This is a summary of "Protecting Perishable Foods During Transport by Truck and Rail" by Jeffrey K. Brecht and Steven A. Sargent, Professors, Horticultural Sciences Department, University of Florida, Gainesville, FL; Patrick E. Brecht, President, PEB Commodities, Inc., Petaluma, CA; Jorge Saenz, President, Wireless Data Solutions, Weston, FL; and Leonard Rodowick, Strategic Relations – Food Safety & OEM, Thermo King Corporation, Nixa, MO. The University of Florida, Institute of Food and Agricultural Sciences Extension (UF/IFAS Extension) report received funding from USDA's Agricultural Marketing Service (AMS) through cooperative agreement number 17-TMTSD-FL-0007. The views and opinions expressed in the UF/IFAS Extension report are those of the authors and do not necessarily reflect the policies and opinions of the U.S. Department of Agriculture. The full report is available at: https://edis.ifas.ufl.edu/pdffiles/HS/HS132800.pdf.

The issuance of the Food and Drug Administration (FDA) Food Safety Modernization Act (FSMA) Final Rule on Sanitary Transportation of Human and Animal Food led to a request by the authors to revise USDA AMS Agriculture Handbook No. 669, "Protecting Perishable Foods During Transport by Truck," last revised in 1995. The initial 1987 edition of Handbook 669 superseded Handbook No. 105, "Protecting Perishable Foods During Transport by Motortruck," revised in 1970, after its initial publication in 1956.

"These handbooks have been extremely popular, and tens of thousands of copies have been distributed worldwide. The importance of protecting perishable foods from loss of quality during transport has long been recognized... Thus, an updated version of this handbook has been long overdue, addressing both the advances in technology and the importance of food safety considerations in the transport of perishable foods."[1]

"Many individuals and organizations provided information or other assistance in revising this handbook. Special recognition goes to the University of Florida, Institute of Food and Agricultural Science, Communications Office, for formatting the handbook and for preparing the illustrations. We appreciate the suggestions offered by those with whom we discussed this publication. A great deal of the information on recommended handling requirements for fresh fruits and vegetables is from the recently updated USDA Handbook No. 66, "The Commercial Storage of Fruits, Vegetables, and Florist and Nursery Stocks."[2]

The report discusses the following topics, with additional information in the appendices: Important Factors in Protection of Perishable Foods; Preparation for Loading; Loading and Unloading Considerations; Loading (Stowage) Patterns; Individual Commodity Requirements; Regulatory Considerations for Truck Construction Materials, Cleaning Compounds, and Sanitation; and Food Safety Considerations for Transporting Perishable Foods by Truck.

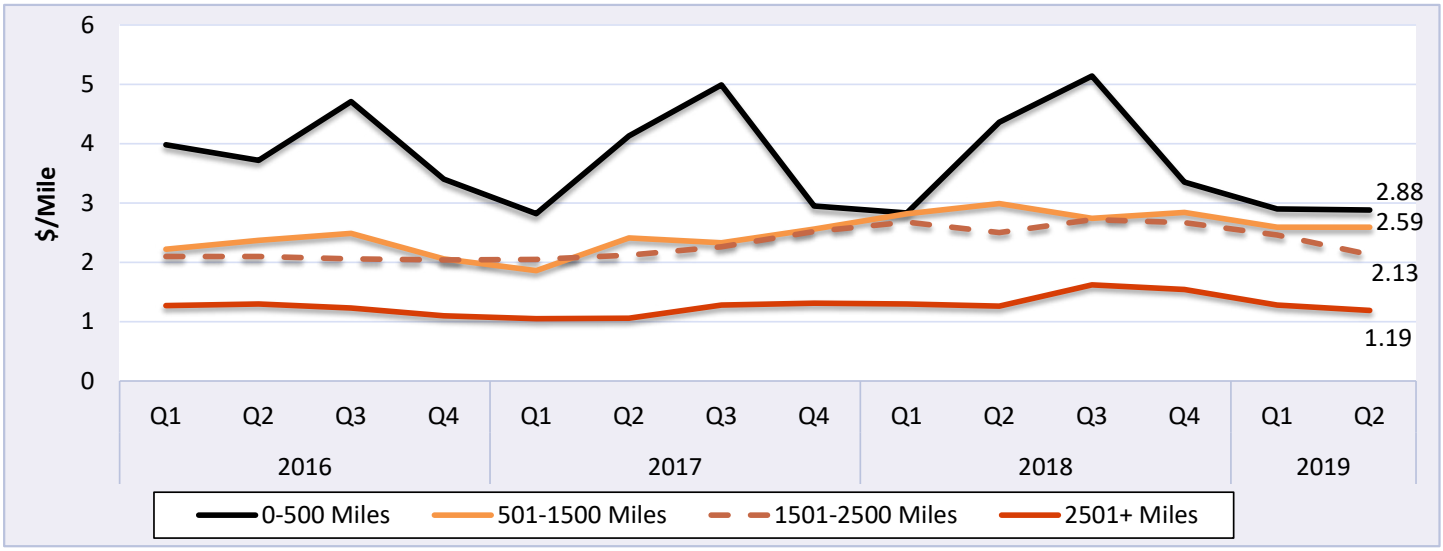
"This updated edition reflects the dynamic changes and innovations in the handling and transportation of perishable foods. Some of these include improved insulation and air movement, microprocessors for more efficient refrigeration, expert systems to control the transport environment and conserve fuel energy, and the use of telematics to monitor and control the performance of refrigerated vehicles during transit. This edition includes descriptions and recommendations for food transported over the road and by rail in marine containers, as well as in railcars."[3]

1, 2, 3 Brecht, Jeffrey K., Steven A. Sargent, Patrick E. Brecht, Jorge Saenz, and Leonard Rodowick. Protecting Perishable Foods During Transport by Truck or Rail, Preface, p. ix, HS1328, Horticultural Sciences Department, University of Florida/Institute of Food and Agricultural Sciences Extension, April 2019. Web. https://edis.ifas.ufl.edu/pdffiles/HS/HS132800.pdf.

NATIONAL SUMMARY

Truck Rates

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



Source: AMS Transportation Services Division analysis of AMS Specialty Crops Program Market News data

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

Year	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter	Annual
2019	2.59	2.59			2.59
2018	2.82	2.99	2.74	2.84	2.85
2017	1.86	2.41	2.33	2.56	2.29
2016	2.22	2.37	2.49	2.06	2.28
2015	2.47	2.63	2.59	2.36	2.51
2014	2.32	2.67	2.64	2.49	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

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

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

Origin	2nd Quarter, 2019			1st Quarter, 2019		
	April	May	June	January	February	March
Arizona	3.33	n/a	3.12	3.80	3.21	3.18
Arizona-Mexico	2.60	2.68	2.83	2.59	2.46	2.49
California	2.59	2.62	2.83	2.77	2.47	2.43
Florida	2.33	2.66	2.77	2.21	2.40	2.22
Great Lakes	3.48	3.51	3.44	3.62	3.62	3.57
New York	2.76	2.76	2.76	2.92	2.92	2.73
Other	2.85	2.40	2.38	2.90	2.92	2.89
PNW	2.01	1.94	1.88	2.41	2.23	2.07
Southeast	3.99	3.94	3.83	3.99	3.99	3.99
Texas	2.48	2.37	2.37	2.67	2.42	2.61
Texas-Mexico	2.34	2.26	2.22	2.54	2.30	2.48

Source: AMS Transportation Services Division analysis of AMS Specialty Crops Program Market News data.
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, 2nd Quarter 2019 ($/Mile)

U.S. Origin	Destination									
	Atlanta	Baltimore	Boston	Chicago	Dallas	Los Angeles	Miami	New York	Philadelphia	Seattle
Arizona	2.69	2.72	2.54	2.49	3.28	n/a	2.68	2.71	2.72	n/a
Arizona-Mexico	2.46	n/a	n/a	2.17	2.69	2.71	2.41	2.43	2.43	n/a
California	2.42	2.48	2.39	2.26	2.65	n/a	2.48	2.49	2.49	2.62
Florida	2.58	2.81	2.65	1.81	n/a	1.67	3.02	2.77	2.49	n/a
Great Lakes	3.36	3.60	3.47	4.05	2.69	n/a	2.96	3.86	3.69	n/a
New York	2.65	5.00	9.56	3.27	n/a	n/a	2.34	10.33	7.17	n/a
Other	2.86	2.81	2.89	2.34	4.03	2.08	2.22	2.80	2.80	n/a
PNW	2.34	2.31	2.28	2.46	2.15	1.96	2.23	2.41	2.33	7.86
Southeast	5.27	5.38	4.02	3.32	n/a	n/a	3.25	4.44	4.80	n/a
Texas	2.57	2.37	2.31	2.28	3.45	1.83	2.38	2.57	2.40	2.20
Texas-Mexico	2.37	2.28	2.27	2.19	2.97	1.74	2.28	2.44	2.30	2.13

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

Table 4: Origin-Destination Truck Rates for Selected Routes, 2nd Quarter 2019 ($/Truck)

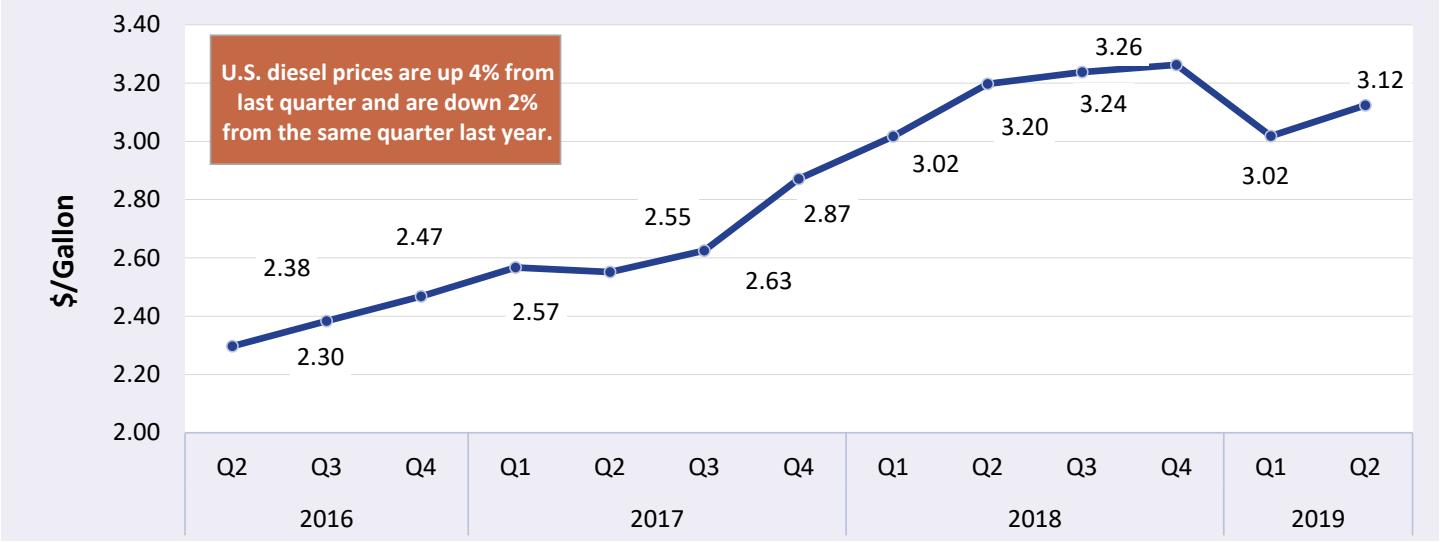
U.S. Origin	Destination									
	Atlanta	Baltimore	Boston	Chicago	Dallas	Los Angeles	Miami	New York	Philadelphia	Seattle
Arizona	5,050	6,425	6,900	4,538	3,663	n/a	6,688	6,738	6,575	n/a
Arizona-Mexico	4,435	n/a	n/a	3,908	2,635	1,515	5,488	6,077	5,842	n/a
California	5,436	6,773	7,328	4,758	3,971	n/a	7,014	7,100	6,948	3,237
Florida	1,282	2,665	3,564	2,280	n/a	4,200	725	3,148	2,630	n/a
Great Lakes	3,283	3,887	3,723	1,272	3,006	n/a	4,837	3,755	3,458	n/a
New York	2,650	1,650	1,625	2,750	n/a	n/a	3,400	1,550	1,650	n/a
Other	2,391	4,024	3,949	2,145	2,070	1,931	4,553	3,918	3,915	n/a
PNW	5,262	5,668	6,235	4,380	3,926	1,965	6,417	6,125	5,837	1,100
Southeast	1,757	2,239	3,341	2,803	n/a	n/a	2,500	2,736	2,500	n/a
Texas	2,727	4,069	4,900	3,100	1,485	2,788	3,481	4,877	4,369	5,104
Texas-Mexico	2,727	4,073	4,992	3,127	1,485	2,788	3,481	4,877	4,365	5,104

Source: AMS Transportation Services Division analysis of AMS Specialty Crops Program Market News data.
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: AMS Transportation Services Division analysis of Energy Information Administration/U.S. Department of Energy data.

Table 5: Average Diesel Fuel Prices (All Types)

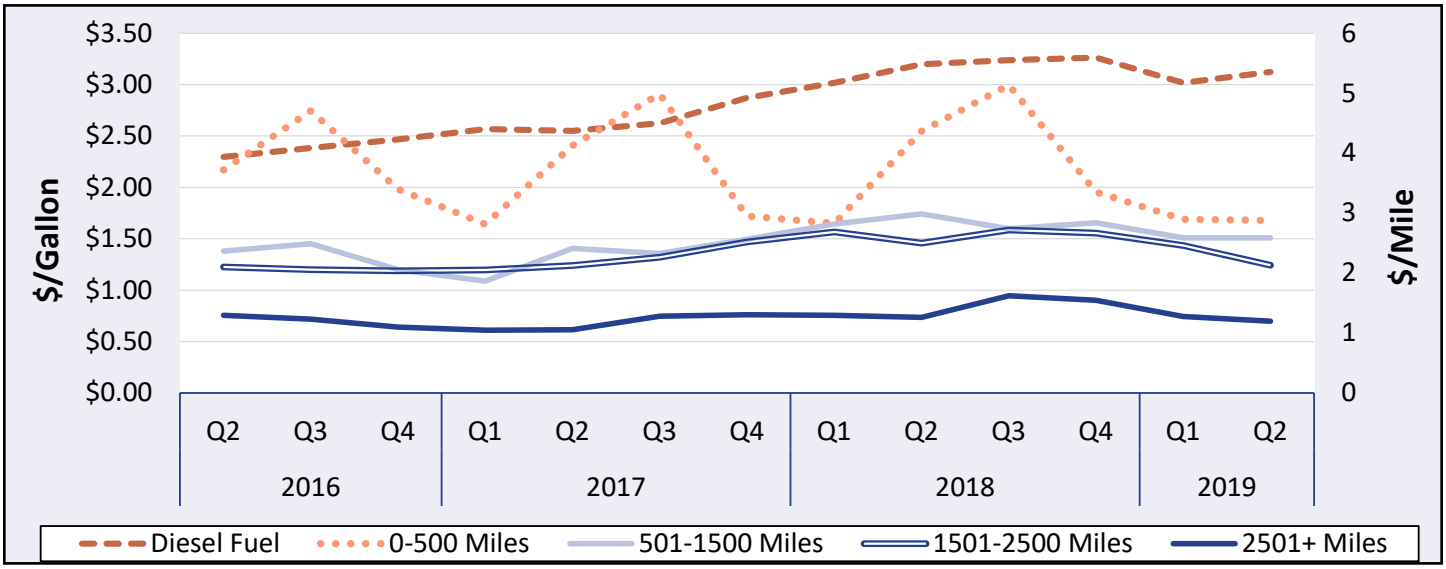
Region	2nd Quarter 2019 Price $/Gallon	Change From Last Quarter	Change From Same Quarter Last Year
East Coast	3.15	2%	-2%
California	4.04	7%	4%
New England	3.21	1%	-1%
Central Atlantic	3.34	2%	-1%
Lower Atlantic	3.01	3%	-2%
Gulf Coast	2.88	2%	-3%
Midwest	3.01	4%	-4%
Rocky Mountain	3.12	6%	-4%
West Coast	3.71	6%	1%
U.S.	**3.12**	**4%**	**-2%**

Source: AMS Transportation Services 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



Sources: AMS Transportation Services 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
2016	Q2	2.30	2.37	11%	7%	-19%	-10%
	Q3	2.38	2.49	4%	5%	-9%	-4%
	Q4	2.47	2.06	4%	-17%	1%	-13%
2017	Q1	2.57	1.86	4%	-9%	24%	-16%
	Q2	2.55	2.41	-1%	29%	11%	2%
	Q3	2.63	2.33	3%	-4%	10%	-7%
	Q4	2.87	2.56	9%	10%	16%	25%
2018	Q1	3.02	2.82	5%	10%	18%	51%
	Q2	3.20	2.99	6%	6%	25%	24%
	Q3	3.24	2.74	1%	-8%	23%	18%
	Q4	3.26	2.84	1%	4%	14%	11%
2019	Q1	3.02	2.59	-8%	-9%	0%	-8%
	Q2	3.12	2.59	4%	-0%	-2%	-13%

Sources: AMS Transportation Services 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	Commodity	4/2	4/9	4/16	4/23	4/30	5/7	5/14	5/21	5/28	6/4	6/11	6/13	6/18	6/25
Central San Joaquin Valley California	Iceberg Lettuce, Romaine, Leaf Lettuce	3	3	3	3										
Imperial, Palo Verde And Coachella Valleys, California And Central And Western Arizona	Watermelons, Cantaloups, Honeydews, Bell Peppers, Corn, Miscellaneous, Melons														3
Kern District California	Carrots	3	3	3	3	3	3	2	2	2	4	3		3	3
Mexico Crossings Through Nogales, Arizona	Beans, Cucumbers, Eggplant, Melons, Mixed Vegetables, Peppers, Squash, Grapes, Mangos	2	2	3	3	3	3	2	3	2	4	5		3	2
Oxnard District California	Celery, Strawberries, Cilantro, Kale, Parsley, Leaf Lettuce	3	3	3	3	3	3	2	2	2	4	3		3	3
Salinas-Watsonville California	Broccoli, Cauliflower, Romaine, Leaf Lettuce, Strawberries, Iceberg Lettuce	3	3	3	3	3	3	2	2	2	4	3		3	3
San Joaquin Valley California	Peaches, Nectarines, Watermelons, Bell Peppers, Corn, Nectarines,Plums													3	3
Santa Maria California	Broccoli, Cauliflower, Iceberg Lettuce, Strawberries, Romaine, Leaf Lettuce, Lettuce, Celery	3	3	3	3	3	3	2	2	2	4	3		3	3
South District California	Citrus, Avocados	3	3	4	3	3	3	3	2	2	4	3		3	3
Western Arizona	Iceberg Lettuce, Broccoli, Cauliflower, Romaine, Leaf Lettuce, Celery	3	3	3											

Florida	Commodity	4/2	4/9	4/16	4/23	4/30	5/7	5/14	5/21	5/28	6/4	6/11	6/13	6/18	6/25
Central & South Florida	Tomatoes, Mixed Vegetables, Berries, Melons	2	2	5	4	5	5	5	5						
Florida	Potatoes	3	3	3	3	3	3	3	3	3	3	3		3	
North, Central & South Florida	Tomatoes, Mixed Vegetables, Melons									4	5	4		5	3
South Florida	Melons	3	3	3	3	3	3	3							

Source: AMS Transportation Services Division analysis of AMS Specialty Crops Program Market News data
Note: Empty cells were not reported.

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)	Commodity	4/2	4/9	4/16	4/23	4/30	5/7	5/14	5/21	5/28	6/4	6/11	6/13	6/18	6/25
Central Wisconsin	Potatoes	3	3	3	3	3	3	3	3	3	3	3		3	3
Michigan	Apples	3	3	3	3	3	3	3	3	3	3				

U.S.-Mexico border	Commodity	4/2	4/9	4/16	4/23	4/30	5/7	5/14	5/21	5/28	6/4	6/11	6/13	6/18	6/25
Nogales, Arizona	Beans, Cucumbers, Eggplant, Melons, Mixed Vegetables, Peppers, Squash, Grapes, Mangos	2	2	3	3	3	3	2	3	2	4	5		3	2
Texas	Limes, Tomatoes, Broccoli, Mixed Fruit and Vegetables	2	2	2	3	3	3	1	1	1	4	3		3	3

Pacific Northwest (ID, OR, &, WA)	Commodity	4/2	4/9	4/16	4/23	4/30	5/7	5/14	5/21	5/28	6/4	6/11	6/13	6/18	6/25
Columbia Basin Washington	Potatoes, Onions	3	3	3	3	3	3	3	3	3	3	3		3	3
Idaho And Malheur County, Oregon	Onions	3	3	3	3	3	3	3							
Upper Valley, Twin Falls-Burley District Idaho	Potatoes	3	3	3	3	3	3	3	3	3	3	3		3	3
Yakima Valley & Wenatchee District Washington	Apples, Pears, Cherries	3	3	3	3	3	2	2	2	2	3	3		3	3

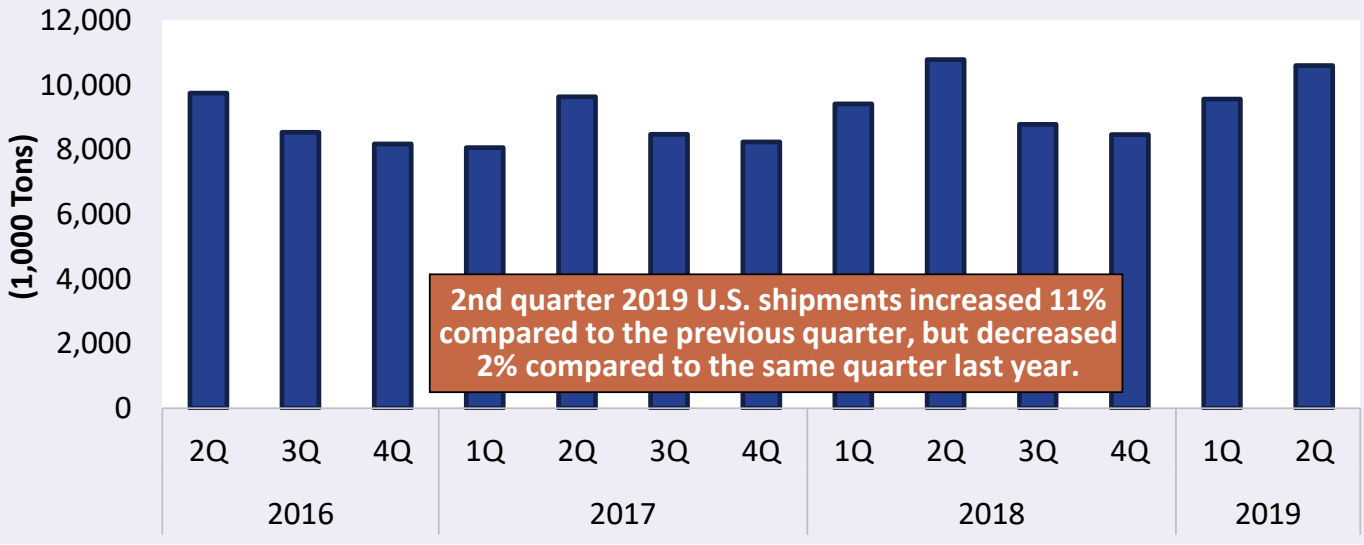
Southeast (GA, SC, & NC)	Commodity	4/2	4/9	4/16	4/23	4/30	5/7	5/14	5/21	5/28	6/4	6/11	6/13	6/18	6/25
Eastern North Carolina	Sweet, Potatoes	3	4	3	3	3	4	4	4	4	4	4	4	4	3
South Carolina	Melons, Tomatoes											4		4	4
South Georgia	Beans, Cucumber, Peaches, Peppers, Squash, Eggplant, Greens, Melons									3	3	3		3	3

Texas and Oklahoma	Commodity	4/2	4/9	4/16	4/23	4/30	5/7	5/14	5/21	5/28	6/4	6/11	6/13	6/18	6/25
Lower Rio Grande Valley, Texas	Onions, Cabbage, Oranges, Grapefruit	2	2	2	3	3	3	1	1	1	4	3		3	3

Source: AMS Transportation Services Division analysis of AMS Specialty Crops Program Market News data
Note: Empty cells were not reported.

Reported U.S. Shipments

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



Source: AMS Transportation Services Division analysis of AMS Specialty Crops Program Market News data

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

Year	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter	Annual
2019	9,573	10,606			20,179
2018	9,419	10,795	8,789	8,474	37,478
2017	8,072	9,642	8,479	8,241	34,433
2016	8,094	9,761	8,541	8,188	34,583
2015	8,118	9,630	8,324	7,771	33,842
2014	7,733	9,139	8,080	7,725	32,677
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

Source: AMS Transportation Services Division analysis of AMS Specialty Crops Program Market News data

Reported Shipments by Selected Commodities

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

Commodity	2nd Quarter 2019	Previous Quarter	Same Quarter Last Year	Current Quarter as % change from:	
				Previous Qtr	Same Qtr Last Year
Watermelons, Seedless	1,272	54	1,103	2268%	15%
Potatoes	1,070	1,053	1,070	2%	0%
Apples	685	848	767	-19%	-11%
Oranges	680	857	614	-21%	11%
Onions Dry	659	584	672	13%	-2%
Strawberries	381	230	420	66%	-9%
Lettuce, Iceberg	354	328	356	8%	-1%
Tomatoes	334	383	372	-13%	-10%
Lemons	313	333	267	-6%	17%
Corn-Sweet	275	105	335	163%	-18%

Source: AMS Transportation Services Division analysis of AMS Specialty Crops Program Market News data

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

Origin	2nd Quarter 2019 Volume	% Change from Last Quarter	% Change From Same Quarter Last Year
Mexico	3,055	1%	7%
California	3,020	39%	-11%
PNW	1,513	-18%	-3%
Florida	1,039	47%	1%
Southeast	752	585%	7%
Texas	360	152%	8%
Other	268	-1%	-19%
Arizona	245	-71%	-16%
Colorado	187	0%	24%
Great Lakes	108	-35%	-9%

Source: AMS Transportation Services Division analysis of AMS Specialty Crops Program Market News data

Regional Markets

U.S.-Mexico border

Volume

During the second quarter of 2019, total reported shipments of fruits and vegetables from Mexico were 3.05 million tons, 7 percent more than the same quarter last year. The sum of the top five commodities increased 9 percent from last year. Increases in seedless watermelons, tomatoes, grapes, and cucumbers offset a 17-percent decrease in avocado shipments.

Rates

Truck rates for shipments between 501 miles and 1,500 miles from the Arizona border crossings averaged $2.70 per mile, up 7 percent from last quarter, but 16 percent lower than the same quarter last year. Rates for shipments between 501 miles and 1,500 miles from the Texas border crossings averaged $2.28 per mile, down 7 percent from the previous quarter, and 27 percent lower than the same quarter last year.

Truck Overview

Diesel fuel prices for border crossings from Arizona averaged $3.28 per gallon, 5 percent higher than the previous quarter, but 4 percent lower than the same period last year. Diesel fuel prices for border crossings from Texas averaged $2.88 per gallon, 2 percent higher than the previous quarter, but 3 percent lower than the same quarter last year. Shippers reported truck availability ranging from "slight surplus" to "adequate" in April through both border crossing locations. In May, conditions through the Texas border crossings improved to a surplus status throughout most of the month, while conditions through the Arizona crossings fluctuated between adequate and slight surplus. In early June, conditions fell into the shortage range for both border crossings but improved to adequate conditions by the end of the month.

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

Commodity	2nd Quarter 2019	Share of Mexico Total	Previous Quarter	Same Quarter Last Year	Current Quarter as % change from:	
					Previous Qtr	Same Qtr Last Year
Watermelons, Seedless	366	12%	53	317	590%	16%
Tomatoes, Plum Type	214	7%	211	193	2%	11%
Avocados	206	7%	334	250	-38%	-17%
Grapes	199	7%	0	142	-	40%
Cucumbers	195	6%	255	182	-23%	7%
Top 5 Total	**1,181**	**39%**	**852**	**1,083**	**39%**	**9%**
Mexico Total	**3,055**	**100%**	**3,029**	**2,848**	**1%**	**7%**

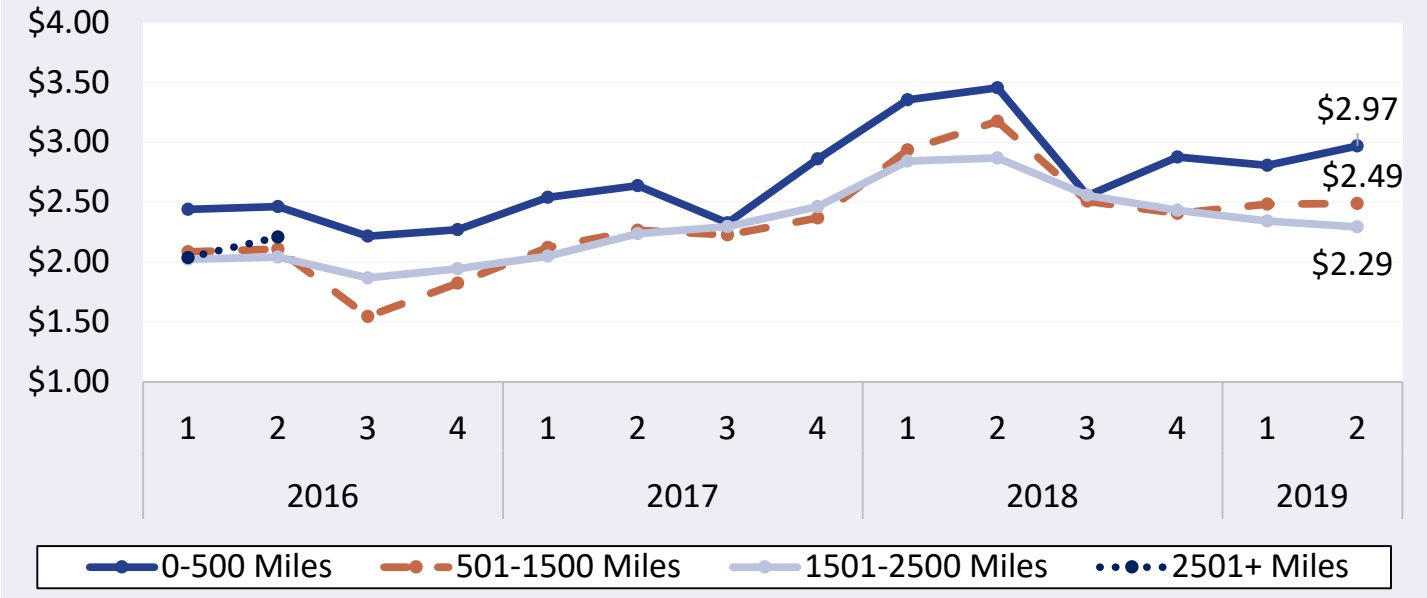
Source: AMS Transportation Services Division analysis of AMS Specialty Crops Program Market News data.
"-" indicates no reported shipments during the quarter.

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

Texas		California		Arizona		New Mexico	
Commodity	2nd Quarter 2019	Commodity	2nd Quarter 2019	Commodity	2nd Quarter 2019	Commodity	2nd Quarter 2019
Avocados	327	Onions Green	41	Cucumbers	168	Peppers, Other	9
Tomatoes	133	Misc Tropical	36	Squash	166	Misc Tropical	3
Limes	125	Tomatoes, Plum Type	30	Peppers, Bell Type	151	Corn-Sweet	0.5
Cucumbers	80	Peppers, Other	25	Tomatoes, Plum Type	128	Onions Dry	0
Strawberries	79	Asparagus	20	Tomatoes	103		
Mexico through TX Total	**1522**	**Mexico through CA Total**	**359**	**Mexico through AR Total**	**1103**	**Mexico through NM Total**	**12**

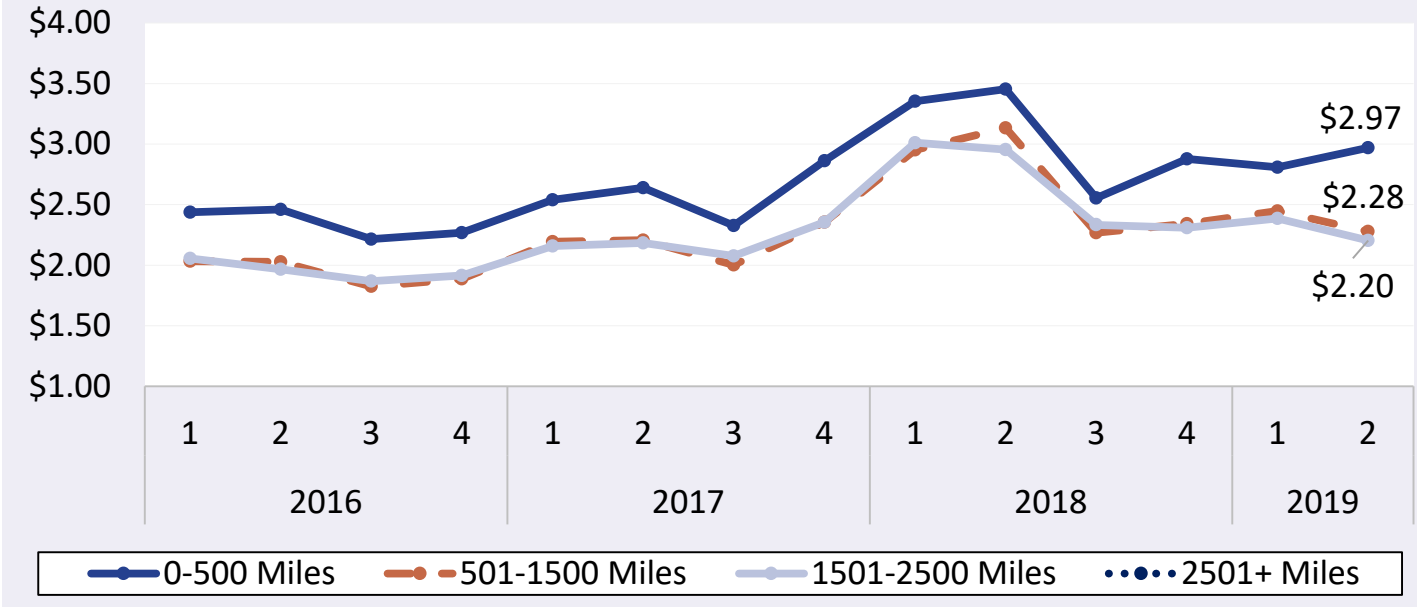
Source: AMS Transportation Services Division analysis of AMS Specialty Crops Program Market News data.
"-" indicates no reported shipments during the quarter.

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



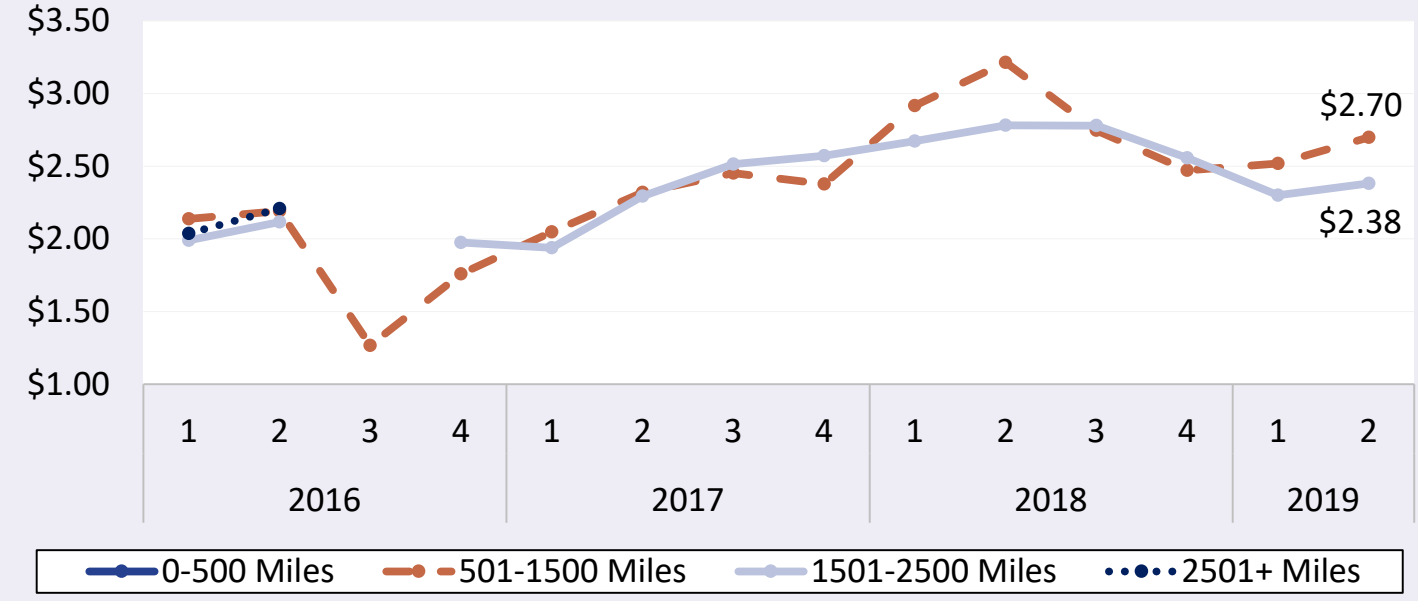
Source: AMS Transportation Services Division analysis of AMS Specialty Crops Program Market News data.
"-" indicates no reported shipments during the quarter.
Gaps in the chart lines are the result of quarters with no reported data for the region.

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



Source: AMS Transportation Services Division analysis of AMS Specialty Crops Program Market News data.
"-" indicates no reported shipments during the quarter.
Gaps in the chart lines are the result of quarters with no reported data for the region.

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



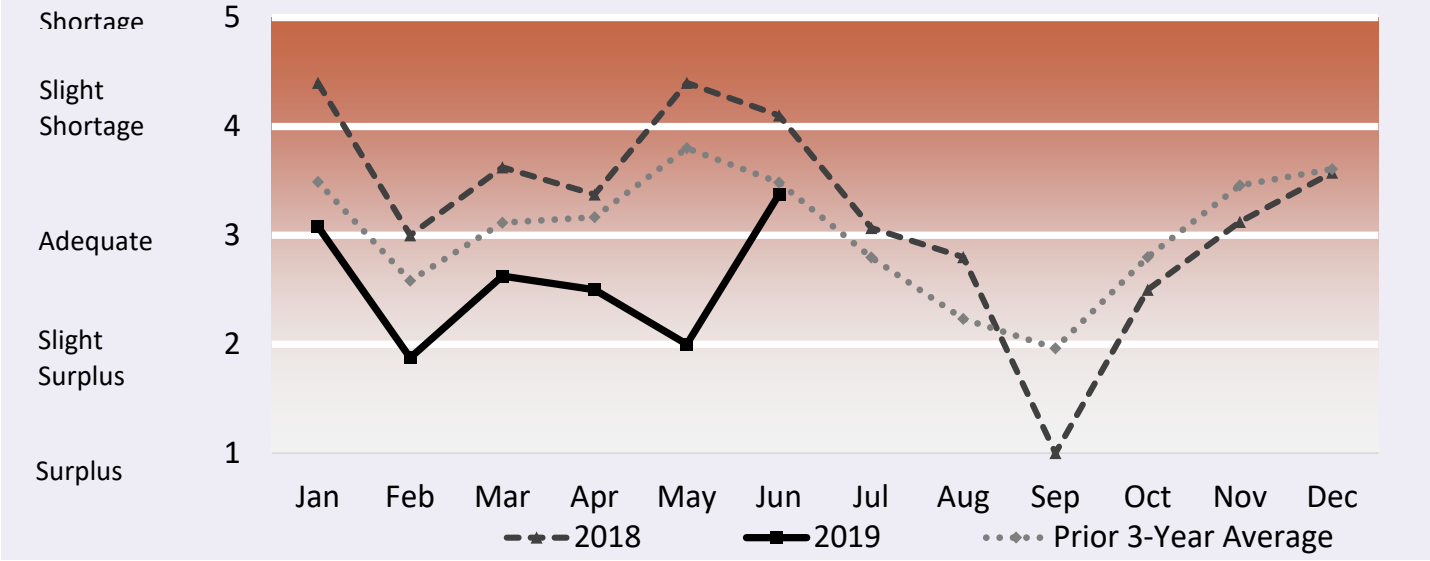
Source: AMS Transportation Services Division analysis of AMS Specialty Crops Program Market News data.
"-" indicates no reported shipments during the quarter.
Gaps in the chart lines are the result of quarters with no reported data for the region.

Table 13: Truck Overview from the U.S.-Mexico Border

Region/Reporting District	Availability Rating, 1=Surplus to 5=Shortage			
	April	May	June	2nd Quarter
Mexico Crossings Through Nogales, Arizona	2.6	2.5	3.5	2.87
Mexico Crossings Through Texas	2.4	1.5	3.25	2.38
Regional Average Availability	2.5	2	3.38	2.63
Diesel Fuel Price ($/gallon), through Texas	**2.90**	**2.91**	**2.83**	**2.88**
Diesel Fuel Price ($/gallon), through Arizona	**3.25**	**3.35**	**3.26**	**3.29**

Source: AMS Transportation Services Division analysis of AMS Specialty Crops Program Market News data.
"-" indicates no reported shipments during the quarter.

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



Source: AMS Transportation Services Division analysis of AMS Specialty Crops Program Market News data.
"-" indicates no reported shipments during the quarter.
Gaps in the chart lines are the result of quarters with no reported data for the region.

California

Volume

Total reported shipments of fruits and vegetables from California during the second quarter of 2019 were 3.02 million tons, an 11-percent decrease from the same quarter last year. The sum of the top five commodities increased 3 percent from the same quarter last year. Increased shipments of oranges and lemons offset decreases in strawberries as well as iceberg and romaine lettuces.

Rates

The quarterly average truck rate for shipments between 501 miles and 1,500 miles was $2.68 per mile, 4 percent higher than the previous quarter, but 16 percent lower than the same quarter last year.

Truck Overview

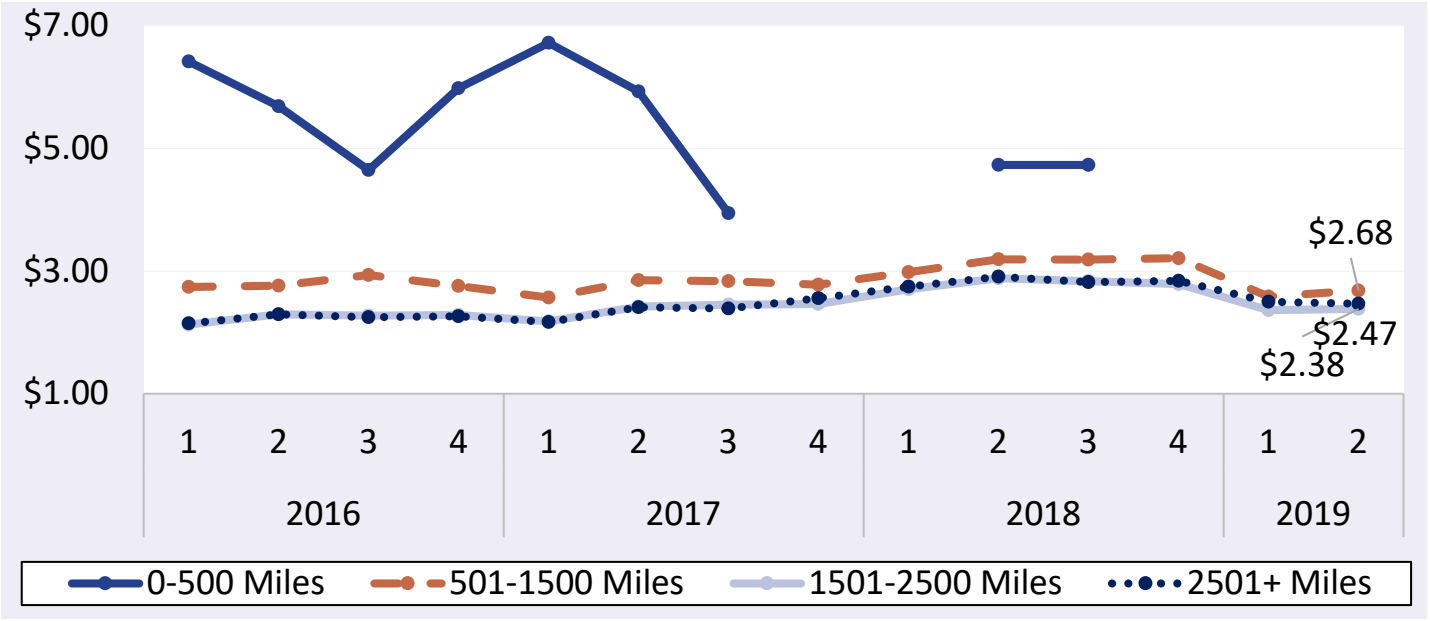
Diesel fuel prices averaged $4.03 per gallon, 7 percent higher than the previous quarter, and 4 percent higher than the same period last year. On average, shippers reported adequate truck availability in all California districts throughout the quarter. In February, all reporting districts reported slight surplus availability conditions.

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

Commodity	2nd Quarter 2019	Share of California Total	Previous Quarter	Same Quarter Last Year	Current Quarter as % change from:	
					Previous Qtr	Same Qtr Last Year
Oranges	631	21%	790	546	-20%	16%
Strawberries	362	12%	39	404	826%	-10%
Lemons	309	10%	330	265	-6%	17%
Lettuce, Iceberg	302	10%	33	327	804%	-8%
Lettuce, Romaine	233	8%	40	250	485%	-7%
Top 5 Total	**1,837**	**61%**	**1,233**	**1,792**	**49%**	**3%**
California Total	**3,020**	**100%**	**2,171**	**3,379**	**39%**	**-11%**

Source: AMS Transportation Services Division analysis of AMS Specialty Crops Program Market News data.
"-" indicates no reported shipments during the quarter.

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



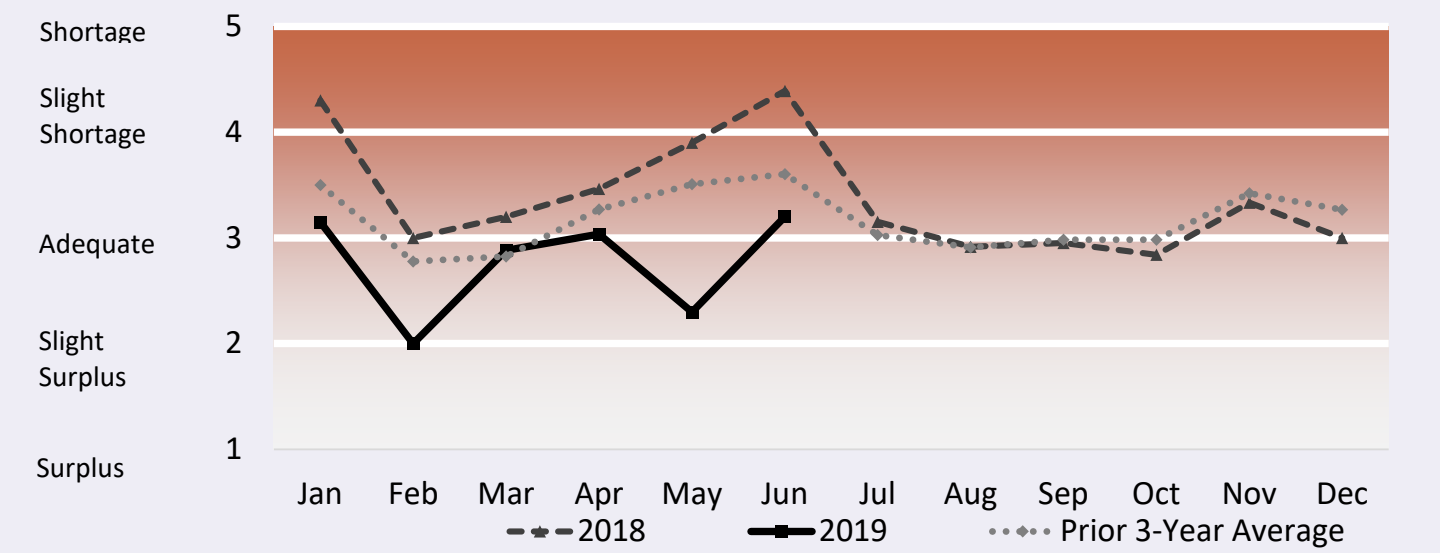
Source: AMS Transportation Services Division analysis of AMS Specialty Crops Program Market News data.
"-" indicates no reported shipments during the quarter.
Gaps in the chart lines are the result of quarters with no reported data for the region.

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

Region/Reporting District	Availability Rating, 1=Surplus to 5=Shortage			
	April	May	June	2nd Quarter
Central San Joaquin Valley California	3	-	-	3
Imperial, Palo Verde And Coachella Valleys, California And Central And Western Arizona	-	-	3	3
Kern District California	3	2.25	3.25	2.83
Oxnard District California	3	2.25	3.25	2.83
Salinas-Watsonville California	3	2.25	3.25	2.83
San Joaquin Valley California	-	-	3	3
Santa Maria California	3	2.25	3.25	2.83
South District California	3.2	2.5	3.25	2.98
Regional Average Availability	3.03	2.3	3.18	2.84
Diesel Fuel Price ($/gallon)	**3.95**	**4.13**	**4.04**	**4.04**

Source: AMS Transportation Services Division analysis of AMS Specialty Crops Program Market News data.
"-" indicates no reported shipments during the quarter.

Figure 10: Refrigerated Truck Availability Monthly Ratings for California



Source: AMS Transportation Services Division analysis of AMS Specialty Crops Program Market News data.
"-" indicates no reported shipments during the quarter.
Gaps in the chart lines are the result of quarters with no reported data for the region.

Pacific Northwest

Volume

Total reported shipments of fruits and vegetables from the Pacific Northwest (PNW) during the second quarter of 2019 were 1.51 million tons, a decrease of 3 percent from the same quarter last year. Changes in volume varied among the top five commodities. Shipments of apples, potatoes, and cherries fell while dry onion and pear shipments increased.

Rates

The quarterly average truck rate for shipments between 501 miles and 1,500 miles was $1.96 per mile, 13 percent lower than the previous quarter, and 7 percent lower than the same quarter last year.

Truck Overview

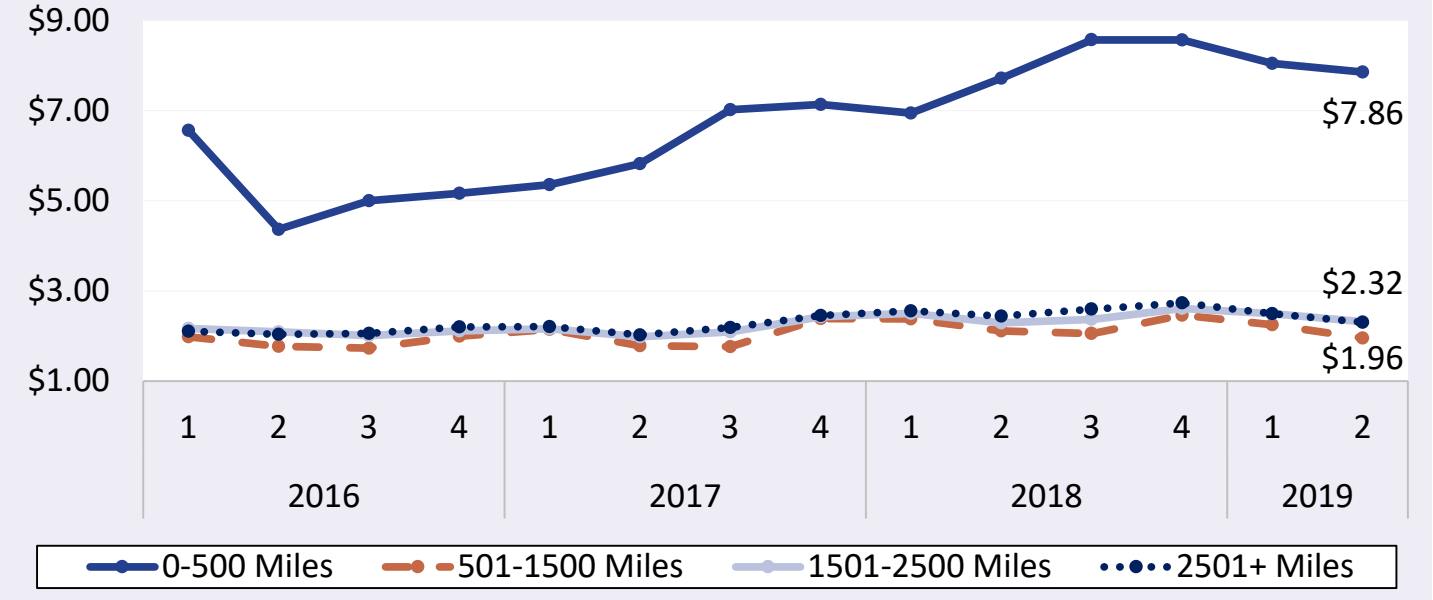
Diesel fuel prices averaged $3.28 per gallon, 5 percent higher than the previous quarter, but 4 percent lower than the same period last year. Through the quarter, shippers reported adequate truck availability in each reporting region in the PNW. The Yakima Valley and Wenatchee District in Washington even reported slight surplus conditions in May.

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

Commodity	2nd Quarter 2019	Share of PNW Total	Previous Quarter	Same Quarter Last Year	Current Quarter as % change from:	
					Previous Qtr	Same Qtr Last Year
Apples	617	41%	722	707	-15%	-13%
Potatoes	517	34%	509	539	2%	-4%
Onions Dry	203	13%	464	140	-56%	45%
Pears	84	6%	155	69	-45%	22%
Cherries	81	5%	0	86	-	-5%
Top 5 Total	**1,503**	**99%**	**1,850**	**1,541**	**-19%**	**-2%**
PNW Total	**1,513**	**100%**	**1,850**	**1,554**	**-18%**	**-3%**

Source: AMS Transportation Services Division analysis of AMS Specialty Crops Program Market News data.
"-" indicates no reported shipments during the quarter.

Figure 11: PNW Truck Rates ($/Mile by Distance Traveled)



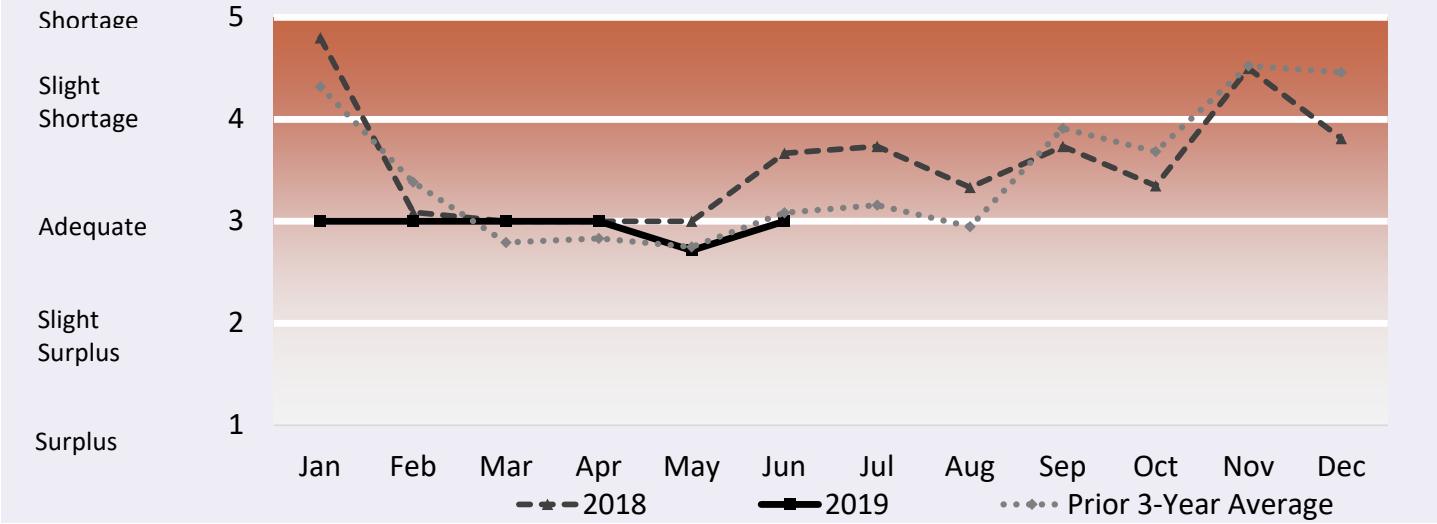
Source: AMS Transportation Services Division analysis of AMS Specialty Crops Program Market News data.
"-" indicates no reported shipments during the quarter.
Gaps in the chart lines are the result of quarters with no reported data for the region.

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

Region/Reporting District	Availability Rating, 1=Surplus to 5=Shortage			
	April	May	June	2nd Quarter
Columbia Basin Washington	3	3	3	3
Idaho And Malheur County, Oregon	3	3	-	3
Upper Valley, Twin Falls-Burley District Idaho	3	3	3	3
Yakima Valley & Wenatchee District Washington	3	2	3	2.67
Regional Average Availability	3	2.75	3	2.92
Diesel Fuel Price ($/gallon)	**3.25**	**3.35**	**3.26**	**3.29**

Source: AMS Transportation Services Division analysis of AMS Specialty Crops Program Market News data.
"-" indicates no reported shipments during the quarter.

Figure 12: Refrigerated Truck Availability Monthly Ratings for the PNW



Source: AMS Transportation Services Division analysis of AMS Specialty Crops Program Market News data.
"-" indicates no reported shipments during the quarter.
Gaps in the chart lines are the result of quarters with no reported data for the region.

Florida

Volume

Total reported shipments of fruits and vegetables from Florida during the second quarter of 2019 were 1.039 million tons, up 1 percent from the same quarter last year. The sum of the top five commodities increased 2 percent from the same quarter last year. Three of the top five commodities including tomatoes (down 9 percent), sweet corn (down 26 percent), and seeded watermelon (down 12 percent) decreased compared with the previous year. However, shipments of seedless watermelons (up 19 percent) and potatoes (up 4 percent) increased.

Rates

The quarterly average truck rate for shipments between 501 miles and 1,500 miles was $2.53 per mile, 11 percent higher than the previous quarter, but 14 percent lower than the same quarter last year.

Truck Overview

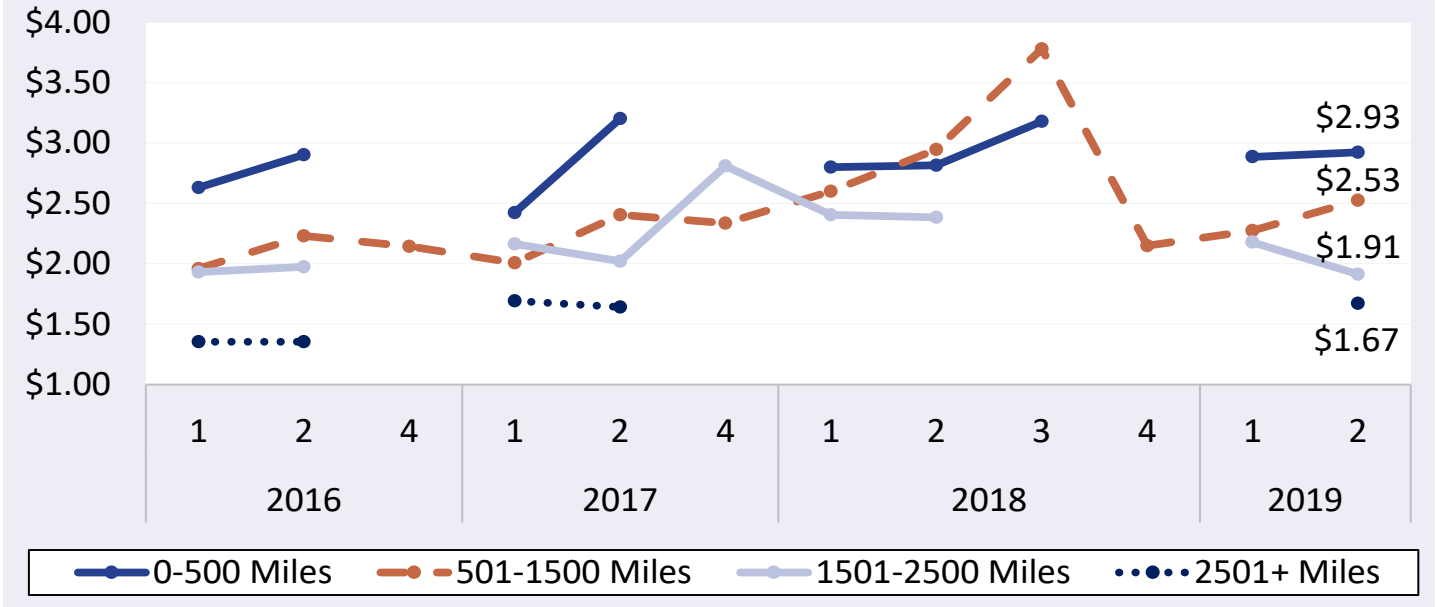
Diesel fuel prices averaged $3.01 per gallon, 3 percent higher than the previous quarter, but 2 percent lower than the same period last year. Florida melon and potatoes producers reported adequate truck availability throughout the quarter. Tomato and mixed vegetable producers reported slight surplus conditions in early April, but conditions shifted by mid-April to "slight shortage" and "shortage" throughout the remainder of the quarter.

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

Commodity	2nd Quarter 2019	Share of Florida Total	Previous Quarter	Same Quarter Last Year	Current Quarter as % change from:	
					Previous Qtr	Same Qtr Last Year
Watermelons, Seedless	427	41%	1	357	-	19%
Tomatoes	131	13%	129	144	1%	-9%
Corn-Sweet	107	10%	68	145	58%	-26%
Potatoes	86	8%	-	83	-	4%
Watermelons, Seeded	37	4%	0	42	-	-12%
Top 5 Total	**787**	**76%**	**197**	**771**	**299%**	**2%**
Florida Total	**1,039**	**100%**	**707**	**1,027**	**47%**	**1%**

Source: AMS Transportation Services Division analysis of AMS Specialty Crops Program Market News data.
"-" indicates no reported shipments during the quarter.

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



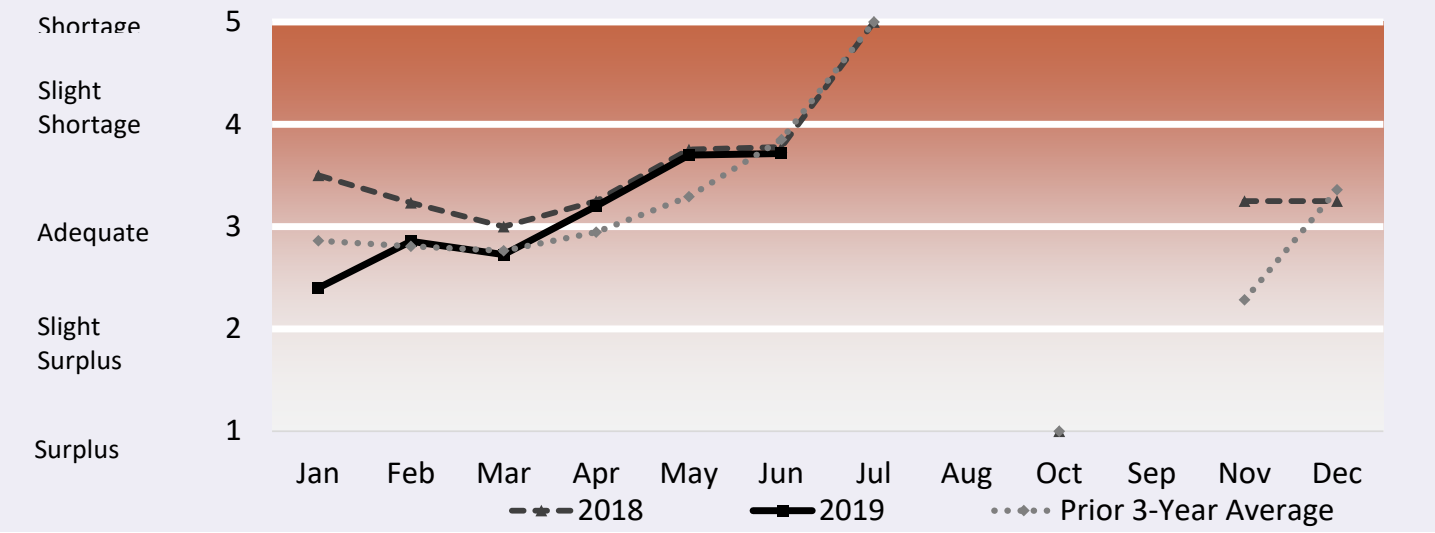
Source: AMS Transportation Services Division analysis of AMS Specialty Crops Program Market News data.
"-" indicates no reported shipments during the quarter.
Gaps in the chart lines are the result of quarters with no reported data for the region.

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

Region/Reporting District	Availability Rating, 1=Surplus to 5=Shortage			
	April	May	June	2nd Quarter
Central & South Florida	3.6	5	-	4.3
Florida	3	3	3	3
North, Central & South Florida	-	4	4.25	4.13
South Florida	3	3	-	3
Regional Average Availability	3.2	3.75	3.63	3.53
Diesel Fuel Price ($/gallon)	**3.02**	**3.03**	**2.98**	**3.01**

Source: AMS Transportation Services Division analysis of AMS Specialty Crops Program Market News data.
"-" indicates no reported shipments during the quarter.

Figure 14: Refrigerated Truck Availability Monthly Ratings for Florida



Source: AMS Transportation Services Division analysis of AMS Specialty Crops Program Market News data.
"-" indicates no reported shipments during the quarter.
Gaps in the chart lines are the result of quarters with no reported data for the region.

Southeast

Volume

During the second quarter of 2019, total reported shipments of fruits and vegetables from the Southeast were 752,000 tons, up 7 percent from the same quarter last year. The sum of the top five commodities increased 11 percent from the same quarter last year. Decreases in sweet corn, dry onions, and sweet potatoes could not cancel out the net-positive effect of strong increases in seedless watermelons and blueberries.

Rates

The quarterly average truck rate for shipments between 501 miles and 1,500 miles was $3.89 per mile, 3 percent lower than the previous quarter, and 4 percent lower than the same quarter last year.

Truck Overview

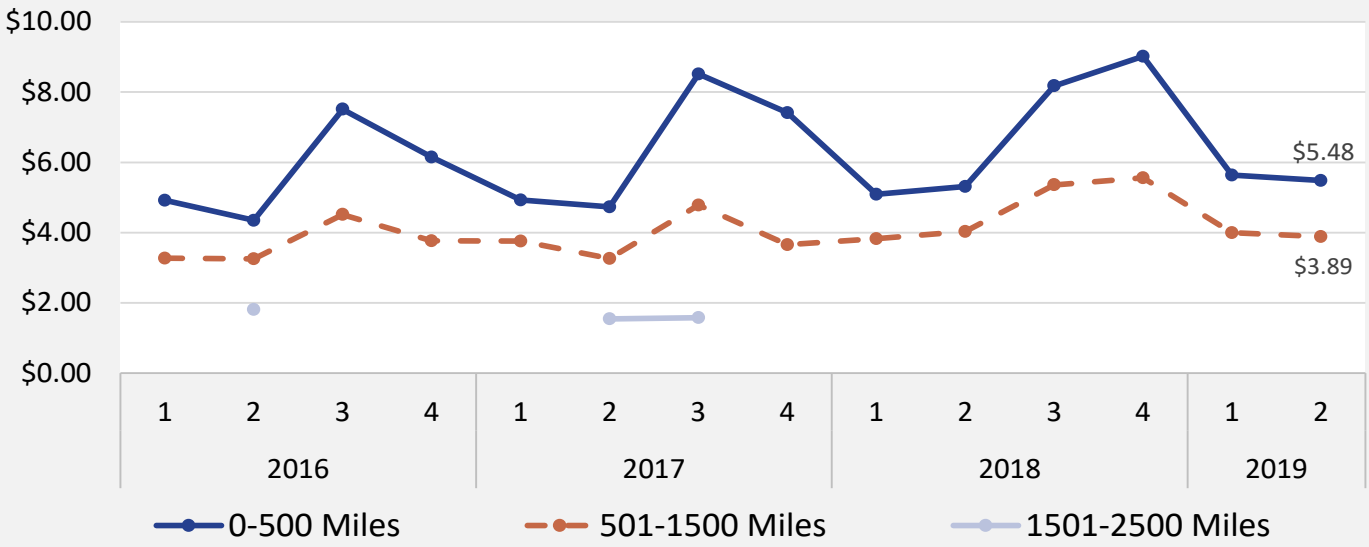
Diesel fuel prices averaged $3.34 per gallon, 2 percent higher than the previous quarter, but 0.4 percent lower than the same period last year. Shippers in Eastern North Carolina reported mostly adequate truck availability in April, but conditions fell to slight shortage through the end of the quarter. Shippers in South Carolina reported slight shortage conditions in June, while southern Georgia shippers reported adequate conditions from the last week of May through the end of June.

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

Commodity	2nd Quarter 2019	Share of Southeast Total	Previous Quarter	Same Quarter Last Year	Current Quarter as % change from:	
					Previous Qtr	Same Qtr Last Year
Watermelons, Seedless	233	31%	0	158	-	47%
Corn-Sweet	103	14%	0	110	-	-6%
Onions Dry	77	10%	0	84	-	-8%
Sweet Potatoes	66	9%	80	86	-18%	-23%
Blueberries	35	5%	0	23	-	49%
Top 5 Total	**513**	**68%**	**80**	**460**	**537%**	**11%**
Southeast Total	**752**	**100%**	**110**	**701**	**585%**	**7%**

Source: AMS Transportation Services Division analysis of AMS Specialty Crops Program Market News data.
"-" indicates no reported shipments during the quarter.

Figure 15: Southeast Truck Rates ($/Mile by Distance Traveled)



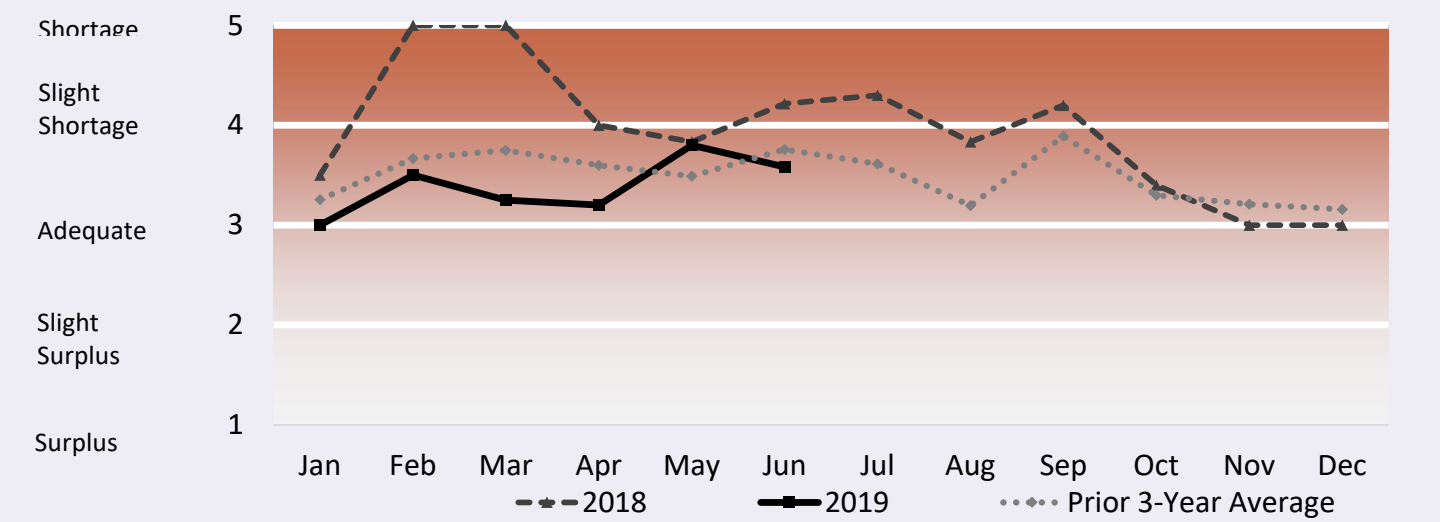
Source: AMS Transportation Services Division analysis of AMS Specialty Crops Program Market News data.
"-" indicates no reported shipments during the quarter.
Gaps in the chart lines are the result of quarters with no reported data for the region.

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

Region/Reporting District	Availability Rating, 1=Surplus to 5=Shortage			
	April	May	June	2nd Quarter
Eastern North Carolina	3.2	4	3.8	3.67
South Carolina	-	-	4	4
South Georgia	-	3	3	3
Regional Average Availability	3.2	3.5	3.6	3.43
Diesel Fuel Price ($/gallon)	**3.02**	**3.03**	**2.98**	**3.01**

Source: AMS Transportation Services Division analysis of AMS Specialty Crops Program Market News data.
"-" indicates no reported shipments during the quarter.

Figure 16: Refrigerated Truck Availability Monthly Ratings for the Southeast



Source: AMS Transportation Services Division analysis of AMS Specialty Crops Program Market News data.
"-" indicates no reported shipments during the quarter.
Gaps in the chart lines are the result of quarters with no reported data for the region.

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.

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Related Websites

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

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
https://www.ers.usda.gov/topics/crops/vegetables-pulses/

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

Protecting Perishable Foods During Transport by Truck and Rail
https://edis.ifas.ufl.edu/pdffiles/HS/HS132800.pdf

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