



Agricultural Refrigerated Truck Quarterly

Transportation Services Branch
Transportation and Marketing Programs
Agricultural Marketing Service
U.S. Department Of Agriculture

1ST Quarter, 2005

A quarterly report focusing on refrigerated truck transportation for the U.S. fresh fruit and vegetable market.

CONTENTS

[NATIONAL SUMMARY](#)

REGIONAL MARKETS

[CALIFORNIA](#)

[FLORIDA](#)

[PACIFIC NORTHWEST](#)

[GREAT LAKES](#)

[MEXICO](#)

[FEATURED COMMODITY:](#)

[POTATOES](#)

[TRUCK RATES FOR MAJOR](#)

[MARKETS](#)

[TERMS AND REFERENCE](#)

First Quarter Truck Rates Decline but Remain Well Above Previous Years.

Truck rates for refrigerated shipments of fruits and vegetables averaged \$1.63 per mile for first quarter 2005. This rate was 7 cents below fourth quarter 2004 but 24 cents higher compared to the same quarter in 2004. Truck rates for shipments of lettuce from California to New York increased by 33 percent during first quarter 2005 compared to the 2-year average.

Truck Volumes Down for First Quarter 2005. Volumes of U.S. refrigerated fruit and vegetable shipments were down 4 percent for first quarter 2005 compared with fourth quarter 2004. This decrease in volume follows a normal trend of lower first quarter volumes, as most fruits and vegetables are typically being harvested during this time period and are not ready for shipment. During first quarter 2005, five refrigerated commodities: apples, lettuce, onions, tomatoes, and potatoes, accounted for 72 percent of the total reported U.S. refrigerated fruit and vegetable truck volumes. Potato shipments, including chipper and seed potatoes, accounted for 34 percent of the total truck volume for first quarter 2005. Refrigerated potato shipments accounted for 41 percent of the total refrigerated truck products shipped from the Pacific Northwest region. This three-state region includes Idaho, Oregon and Washington.

Heavy Rains and Cold Weather Put a Damper on Some Crops. During first quarter 2005, several regions experienced heavy rains and colder than normal temperatures, which destroyed some crops and caused delays and cancellations in harvesting. Production regions in California, such as the San Joaquin Valley, reported a delay in harvesting and reduced crop production for some fruits because of heavy rains in early January. Low temperatures and rain during late winter plantings caused limited lettuce supplies and forced producers to increase rates. Florida growers also reported reduced crop production for the first quarter, as they tried to recover from a severe hurricane season that occurred in the summer of 2004.

AGRICULTURAL REFRIGERATED TRUCK RATE AND VOLUME TRENDS

1st Quarter 2005

Figure 1. Average U.S. Refrigerated Fruit and Vegetable Truck Rate for Key Long-Haul Routes
 (Follow link for [Long-Haul Route Detail](#) in Terms and Reference)

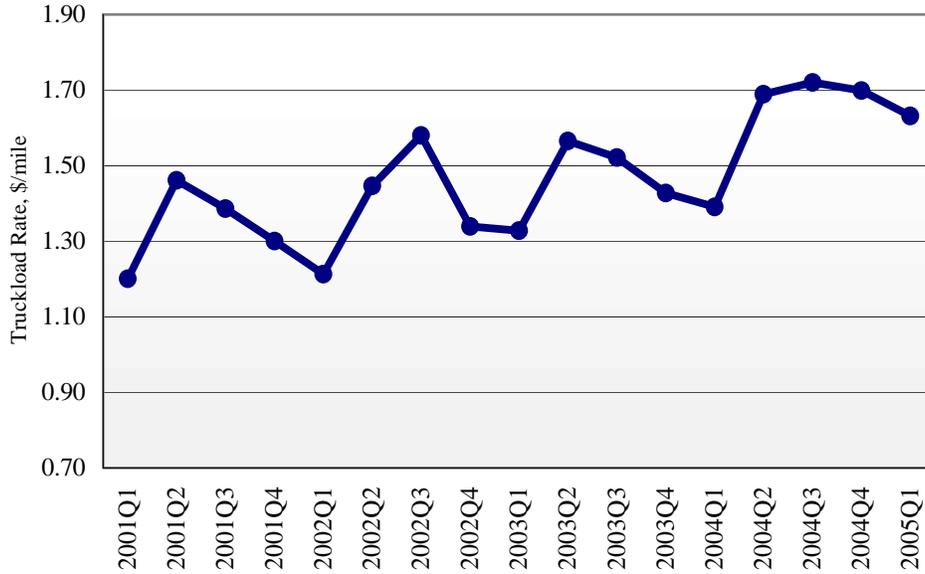
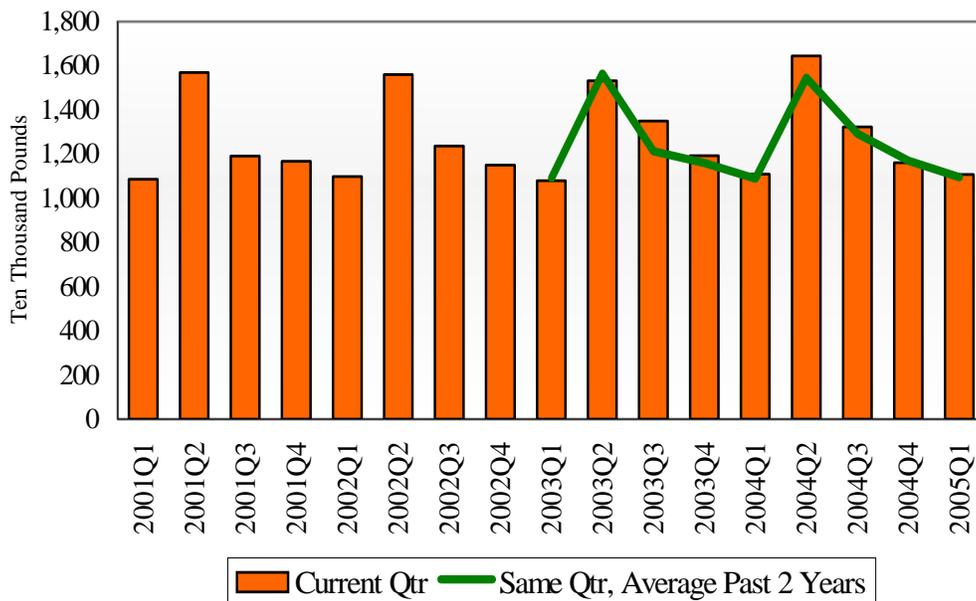


Figure 2. Fruit and Vegetable Refrigerated Truck Volumes for U.S. Origins



NATIONAL FRUIT AND VEGETABLE SUMMARY FOR 1st Quarter 2005

Figure 3. Geography of U.S. Refrigerated Truck Market, Major Origins and Destinations

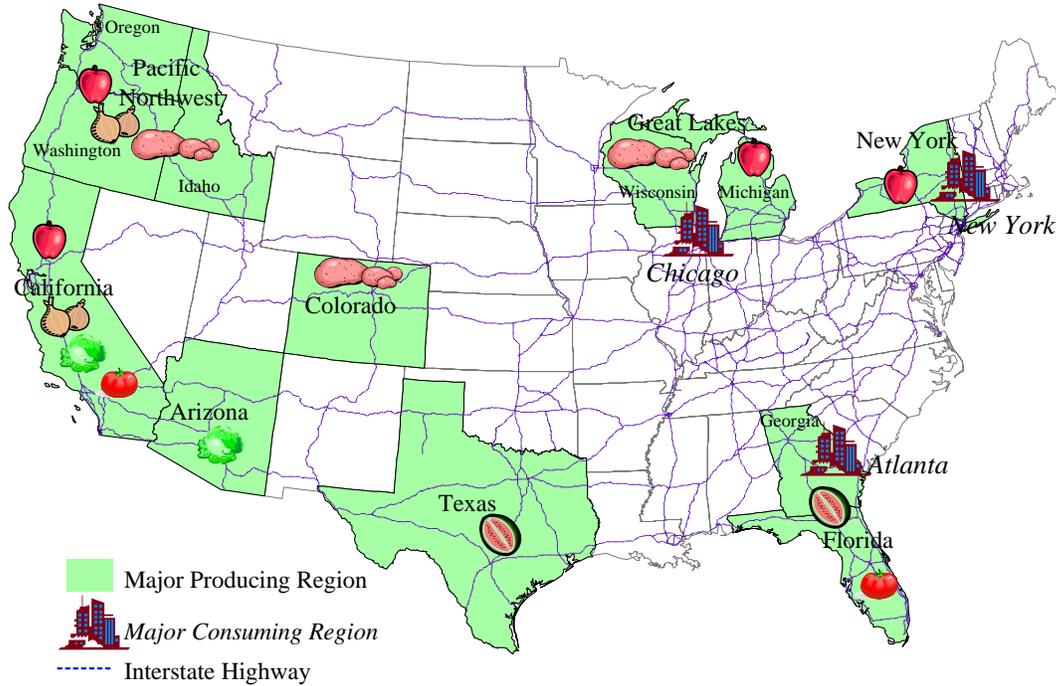


Figure 4. U.S. Refrigerated Fruit and Vegetable Volume, Top 5 Commodities

(Follow Link for [Fruit and Vegetable Truck Market Composition](#))

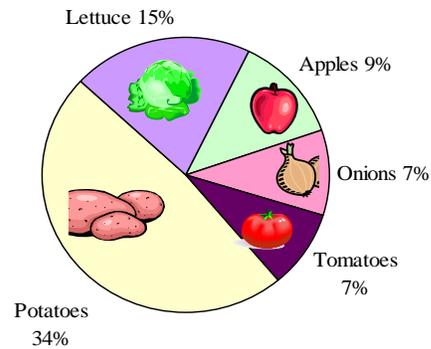
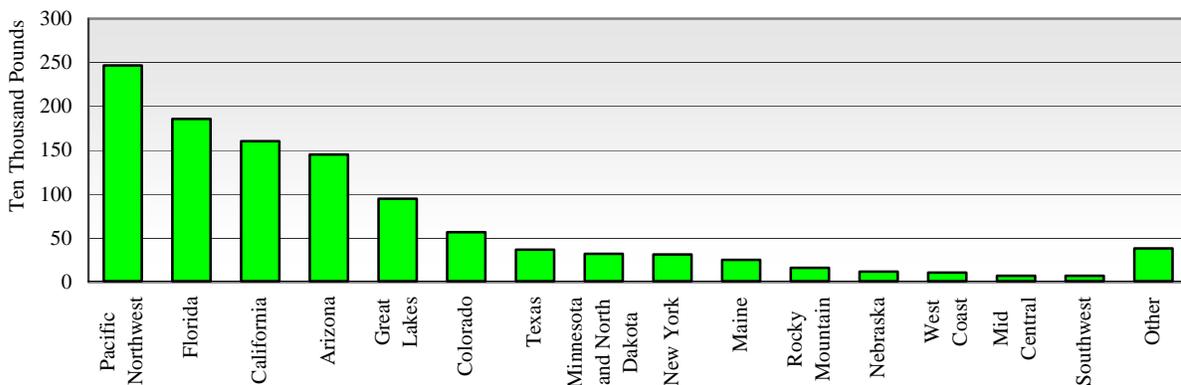


Figure 5. U.S. Refrigerated Fruit and Vegetable Truck Shipments by Origin



For a list of states included under each region please refer to the "Origin Region" section of the Terms and References

CALIFORNIA

California is the top U.S. producer of fruits and vegetables. During quarter 1, 2005, refrigerated fruit and vegetable truck shipments from California accounted for 14 percent of the total U.S. volume.

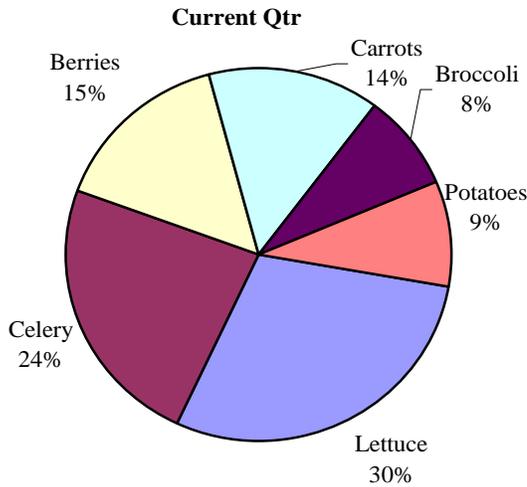


Figure 6. California Refrigerated Truck Products

Figure 7. Top California Refrigerated Truck Volumes by Commodity

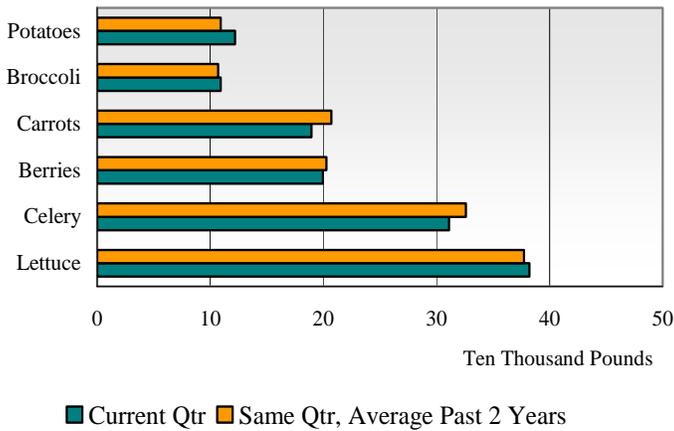


Figure 8. California Refrigerated Truck Volumes

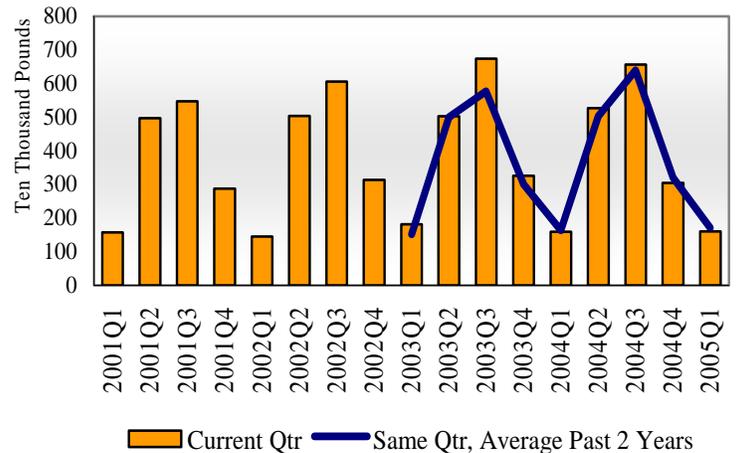
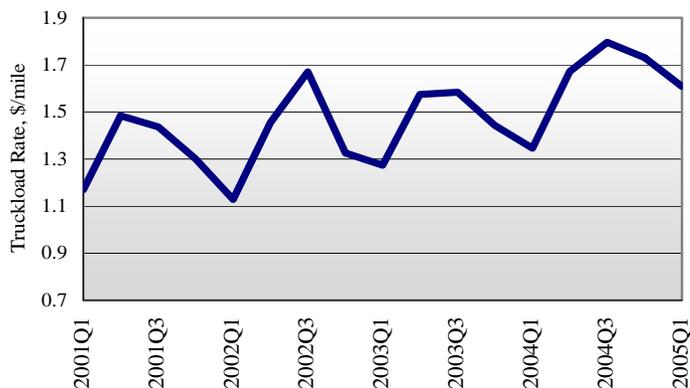


Figure 9. California Refrigerated Fruit and Vegetable Truck Rates



FLORIDA

Florida is a top U.S. producer of fruits and vegetables. During quarter 1, 2005, refrigerated fruit and vegetable truck shipments from Florida accounted for 17 percent of the total U.S. volume.

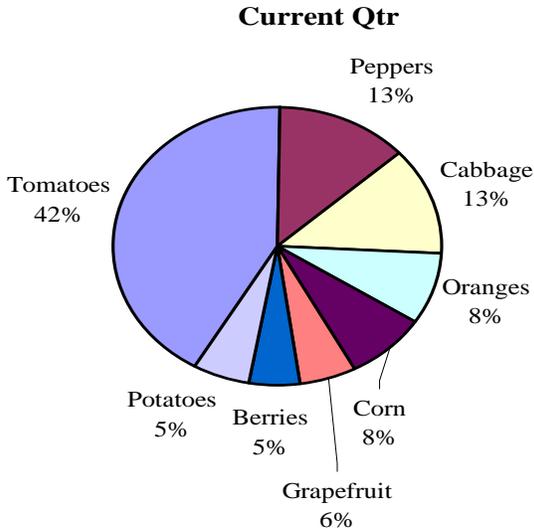


Figure 10. Florida Refrigerated Truck Products

Figure 11. Top Florida Refrigerated Truck Volumes by Commodity

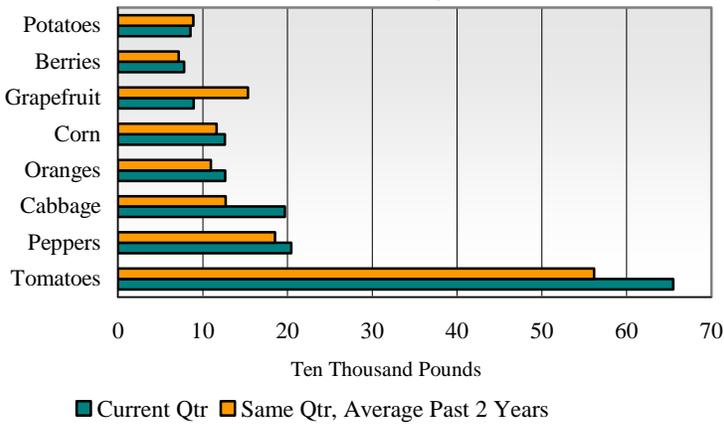


Figure 12. Florida Refrigerated Truck Volumes

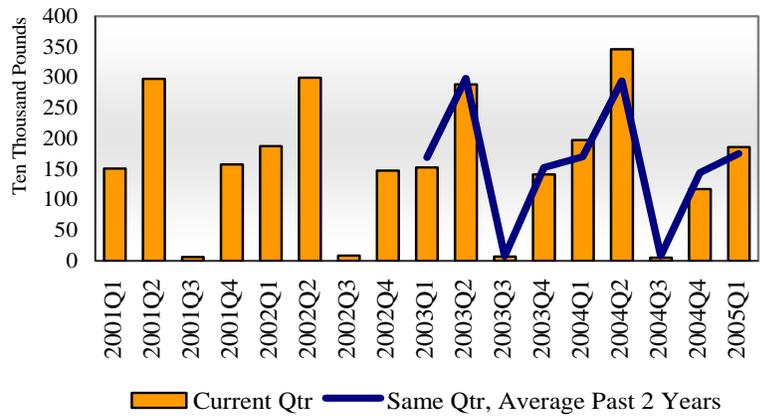
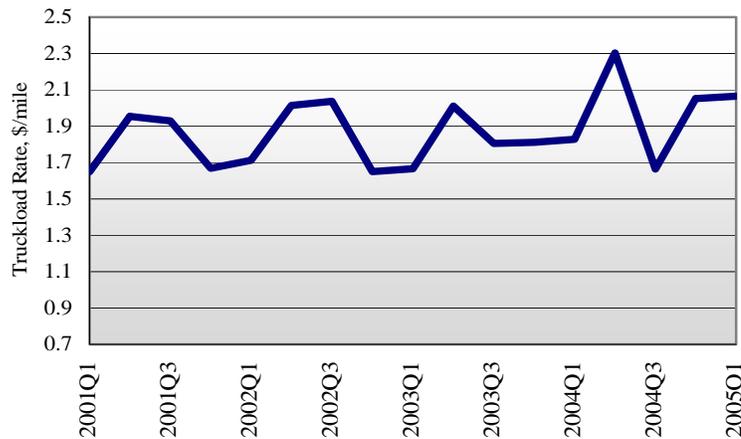


Figure 13. Florida Refrigerated Fruit and Vegetable Truck Rates



PACIFIC NORTHWEST

The Pacific Northwest (PNW) is a top U.S. producer of fruits and vegetables. This three-state region includes Washington, Oregon and Idaho. During first quarter 2005, refrigerated fruit and vegetable truck shipments from the Pacific Northwest accounted for 34 percent of the total U.S. volumes. Refrigerated potato shipments, including chipper and seed potatoes, accounted for 41 percent of the total refrigerated truck products shipped from the PNW.

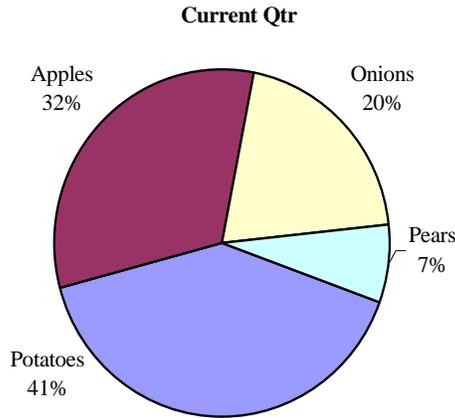


Figure 14. PNW Refrigerated Truck Products

Figure 15. Top PNW Refrigerated Truck Volumes by Commodity

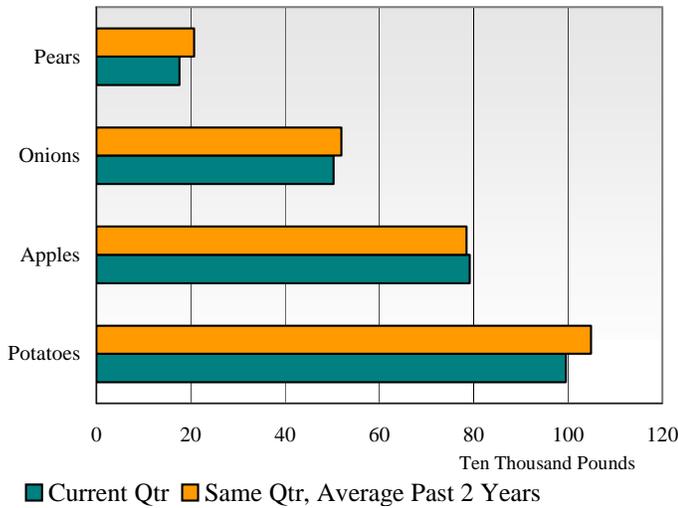


Figure 16. PNW Refrigerated Truck Volumes

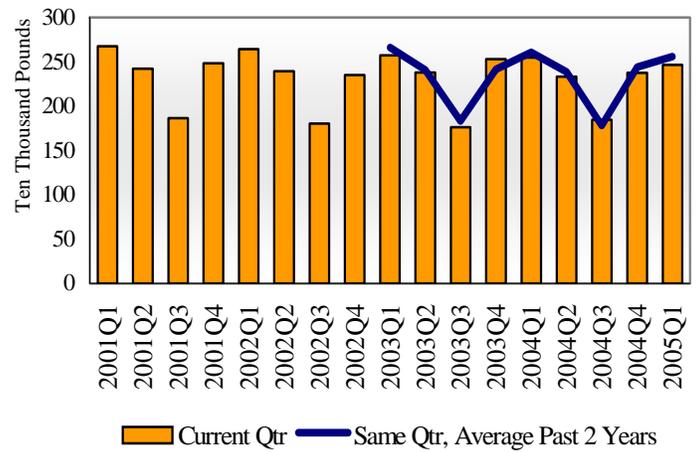
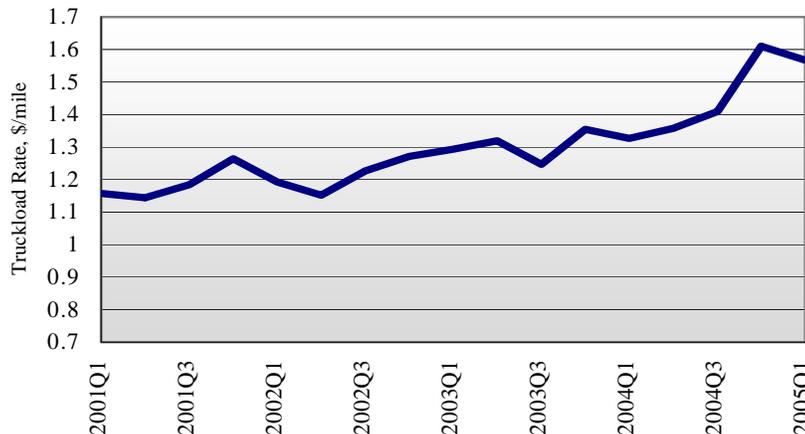


Figure 17. PNW Refrigerated Fruit and Vegetable Truck Rates



GREAT LAKES

The Great Lakes region is a top U.S. producer of fruits and vegetables. During quarter 1, 2005, fruit and vegetable truck shipments from the Great Lakes accounted for 9 percent of the total U.S. volume. The two state region includes Michigan and Wisconsin.

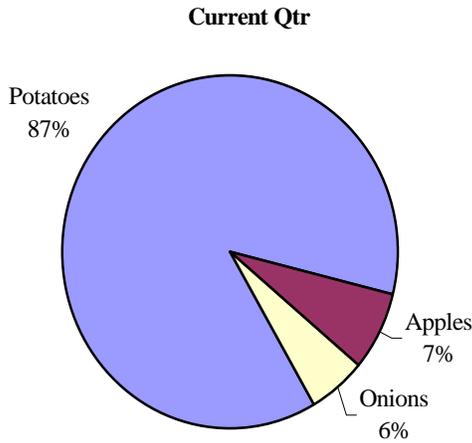


Figure 18. Great Lakes Refrigerated Truck Products

Figure 19. Top Great Lakes Refrigerated Truck Volumes by Commodity

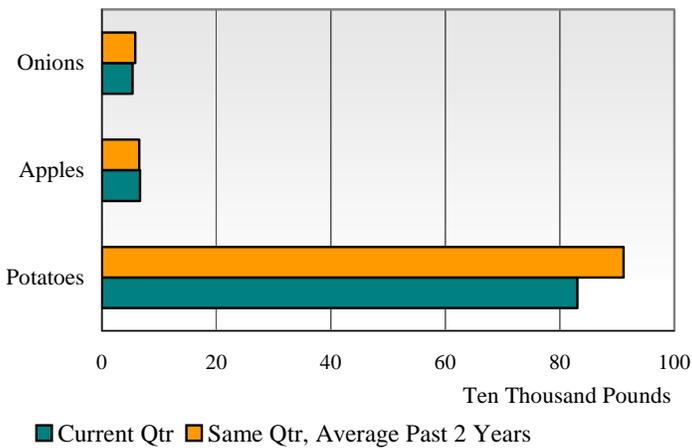


Figure 20. Great Lakes Refrigerated Truck Volumes

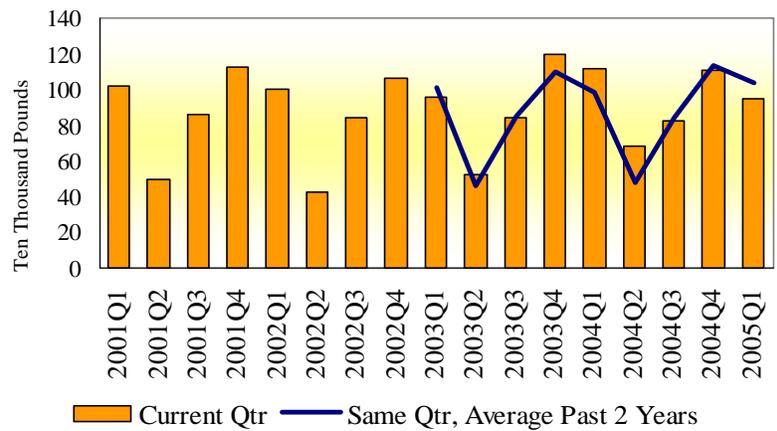
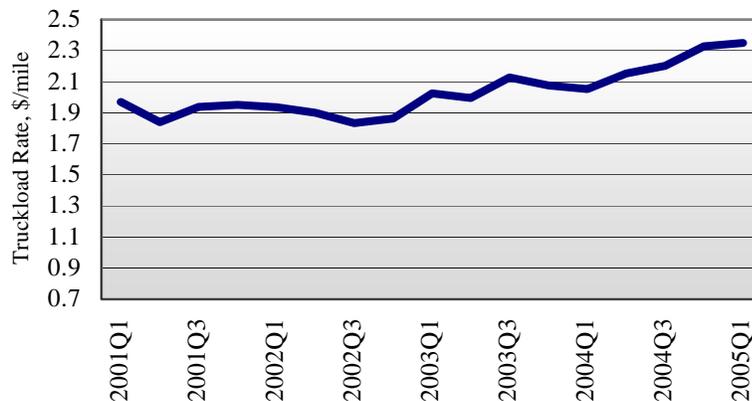


Figure 21. Great Lakes Refrigerated Fruit and Vegetable Truck Rates



MEXICO

Mexico is the leading seller of fruits and vegetables to the United States. Top volume commodities during quarter 1, 2005 included tomatoes, peppers and watermelon.

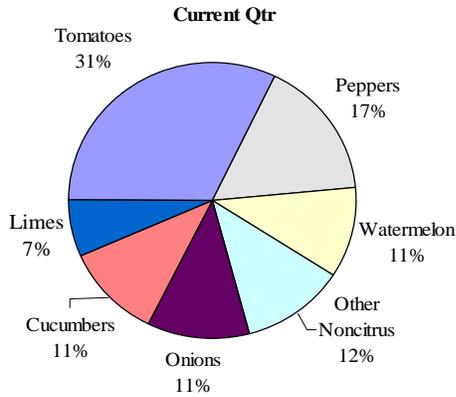


Figure 22. Mexico Refrigerated Truck Products

Figure 23. Top Mexico Refrigerated Truck Volumes by Commodity

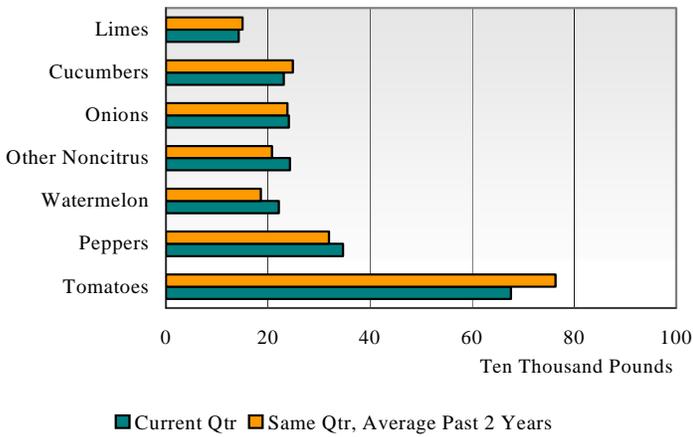


Figure 24. Mexico Refrigerated Truck Volumes

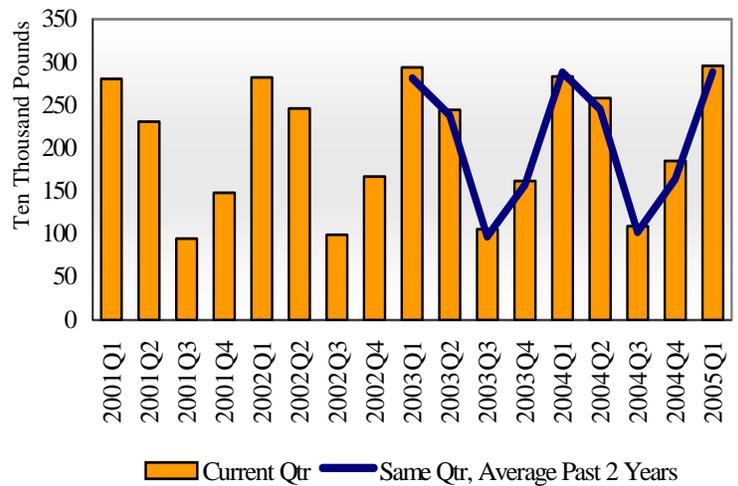
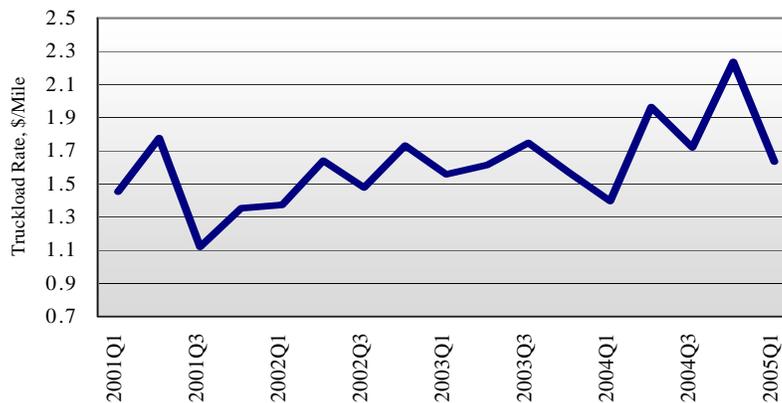


Figure 25. Mexico Refrigerated Fruit and Vegetable Truck Rates



FEATURED COMMODITY: POTATOES

During quarter 1 2005, shipments of potato products accounted for 34 percent of U.S. fruit and vegetable truckload volumes. Refrigerated potato shipments from the Pacific Northwest region accounted for 33 percent of that volume. Volume totals for potatoes include fresh potatoes and potatoes for processing such as chipper and seed potatoes.

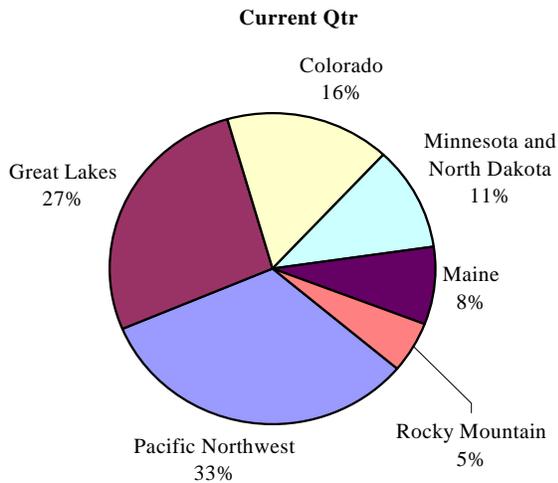


Figure 26. Refrigerated Truckload Origins for Potatoes

Figure 27. Top Refrigerated Truck Potato Origins

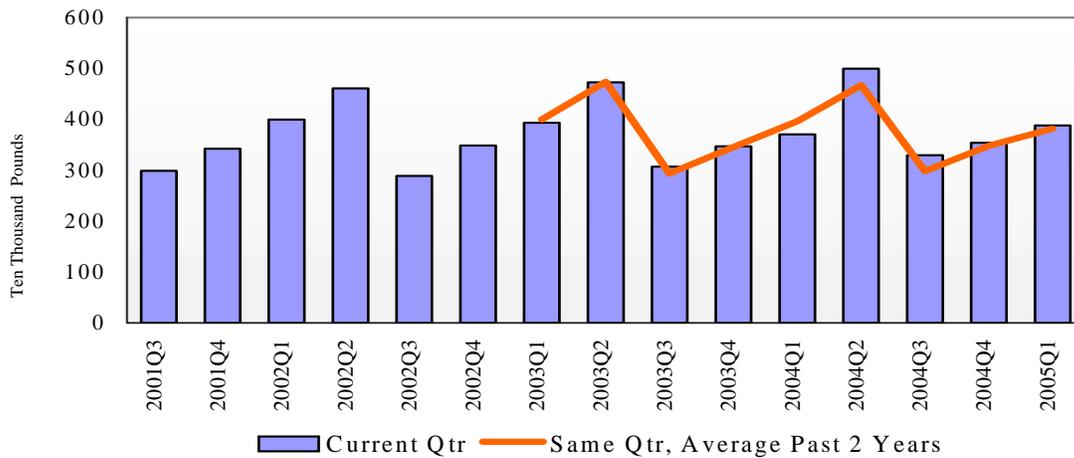
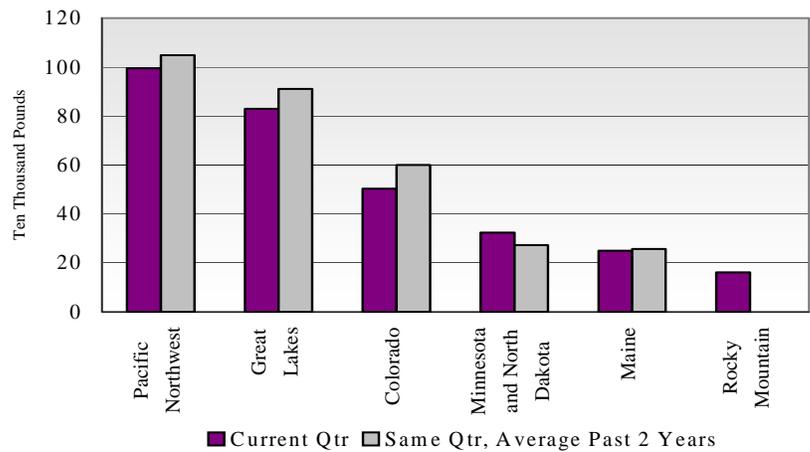


Figure 28. Refrigerated Truck Volume Trends for Potatoes

TRUCK RATES FOR MAJOR MARKETS

Refrigerated truck rates for fruit and vegetable shipments vary across markets and time. Rates included in this table cover major corridors for long-distance truck shipments from fruit and vegetable producing regions in the United States and Mexico to consumer centers in the United States.

Table 1: Origin-Destination Truck Rate Index for Fruit & Vegetable Shipments in Major Corridors
Rate per Truck for Current Quarter Compared to Same Quarter for Previous 2 Years

Origin	Commodity	Destination					
		New York		Atlanta		Chicago	
		Q12005	2-Yr Avg.	Q12005	2-Yr Avg.	Q12005	2-Yr Avg.
California	Lettuce	\$5,050	\$3,790	\$3,500	\$2,890	\$3,500	\$2,510
	Other Noncitrus	\$4,562	\$3,850	\$3,850	\$2,900	\$3,212	\$2,600
	Other Vegetable	\$4,511	\$3,678	\$3,494	\$3,018	\$3,058	\$2,514
Florida	Other Vegetable	\$2,231	\$1,885	\$1,054	\$946	\$1,860	\$1,679
	Tomatoes	\$2,215	\$1,846	\$1,050	\$898	\$1,856	\$1,578
Great Lakes	Apples	n.a.	n.a.	\$1,598	\$1,360	\$733	\$828
	Onions	\$2,397	\$2,014	\$1,606	\$1,383	\$642	\$595
	Potatoes	\$2,416	\$1,967	\$1,838	\$1,530	\$574	\$533
Mexico	Other Vegetable	\$4,215	\$3,579	\$3,029	\$2,300	\$2,835	\$2,362
Pacific Northwest	Apples	\$4,586	\$3,990	\$4,381	\$3,641	\$3,105	\$2,695
	Onions	\$4,139	\$3,353	\$3,256	\$2,770	\$2,497	\$2,060
	Potatoes	\$3,901	\$3,287	\$3,320	\$2,474	\$2,324	\$1,875

Table 2: Origin-Destination Truck Rate Index for Fruit & Vegetable Shipments in Major Corridors
Rate per Mile for Current Quarter Compared to Same Quarter for Previous 2 Years

Origin	Commodity	Destination					
		New York		Atlanta		Chicago	
		Q12005	2-Yr Avg.	Q12005	2-Yr Avg.	Q12005	2-Yr Avg.
California	Lettuce	\$1.80	\$1.35	\$1.59	\$1.31	\$1.75	\$1.26
	Other Noncitrus	\$1.63	\$1.38	\$1.75	\$1.32	\$1.61	\$1.30
	Other Vegetable	\$1.61	\$1.31	\$1.59	\$1.37	\$1.53	\$1.26
Florida	Other Vegetable	\$2.03	\$1.71	\$2.63	\$2.36	\$1.55	\$1.40
	Tomatoes	\$2.01	\$1.68	\$2.63	\$2.24	\$1.55	\$1.32
Great Lakes	Apples	n.a.	n.a.	\$1.84	\$1.56	\$2.53	\$2.86
	Onions	\$3	\$3	\$1.85	\$1.59	\$2.21	\$2.05
	Potatoes	\$3.02	\$2.46	\$2.11	\$1.76	\$1.98	\$1.84
Mexico	Other Vegetable	\$1.83	\$1.56	\$2	\$2	\$1.77	\$1.48
Pacific Northwest	Apples	\$1.76	\$1.53	\$1.83	\$1.52	\$1.73	\$1.50
	Onions	\$1.59	\$1.29	\$1.36	\$1.15	\$1.39	\$1.14
	Potatoes	\$1.50	\$1.26	\$1.38	\$1.03	\$1.29	\$1.04

n.a.: not available in reported data

For calculation details, and commodities used in "other" categories, please refer to the [Regional Rates](#) section of Terms and References.

TERMS AND REFERENCES

Data Sources: The AgRTQ database includes quarterly origin volumes and origin-destination rates from 2001 to current. This information is compiled from weekly *Market News Reports* by USDA, Agricultural Marketing Service (AMS), Fruit and Vegetable Programs, Market News Branch www.ams.usda.gov/fv/mncs/fwires.htm.

Origin Regions: Origin regions are limited to U.S. states. For the regional markets, some states are grouped into producing regions. The Pacific Northwest region includes ID, OR, and WA. The Great Lakes region includes MI and WI. Potatoes for processing such as chipper and seed potatoes are reported by regions, these regions include the following states: Mid Central (KS, MO, NE), Mid West (IL, IN, IA, SD), Southwest (AR, OK, TX), Rocky Mountain (CO, ID, MT, NM, UT, WY), West Coast (AZ, CA, NV, OR, WA, HI). The United States region represents various shipping points for greenhouse tomatoes.

Destination Markets: Atlanta, GA; Chicago, IL; New York, NY

Time Periods: Qtr 1=Jan, Feb, and Mar; Qtr 2=Apr, May, and June; Qtr 3=July, Aug, and Sep; Qtr 4=Oct, Nov, and Dec. Annual data is January through December.

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 inter 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. See *Fresh Fruit and Vegetable Shipments By Commodities, States, and Months, FVAS-4 Calendar Year 2004*: <http://www.ams.usda.gov/fv/mncs/shippsumm04.pdf>

Rates: 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.

Regional Rates: Rate data for three destination markets are used to calculate average origin regional rates. For a complete list of commodities by citrus, noncitrus, and vegetable classification for the "other" categories, please refer to the *Fresh Fruit and Vegetable Shipments by Commodities, States, and Months, FVAS-4 Calendar Year 2004* on page 7 <http://www.ams.usda.gov/fv/mncs/shippsumm04.pdf>. The melon and noncitrus classes are combined in the AgRTQ data. Berries are defined as a separate group due to the special handling truck rate considerations.

Long-Haul Route Detail: The national rate on page 1 reflects long-haul truck rates. The rates for eight long-haul fruit and vegetable truck corridors are included in the national rate, weighted by commodity and origin volume. These major corridors are identified in the route mileage table below.

Table 3--Route Mileage

Origin	Destination	Miles
California	Atlanta	2,200
California	New York	2,800
California	Chicago	2,000
Pacific Northwest	Atlanta	2,400
Pacific Northwest	New York	2,600
Pacific Northwest	Chicago	1,800
Florida	New York	1,100
Florida	Chicago	1,200

Contact [Camia Lane](mailto:Camia.Lane@ams.usda.gov) by email or by telephone at 202-720-9801 with questions about the report or technical assistance with this website.