



Contents:

Market Insight

Quarterly Overview

Regulatory News
and Updates

Feature Article

National Summary

- Truck Rates
- U.S. Diesel Fuel Prices
- Truck Availability
- Shipments

Regional Markets

- California
- Pacific Northwest
- Florida
- Mexico
- Southeast

Terms and References

Contact Information

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Feature Article

Rail Service Problems Affect Pacific Northwest Fruit and Vegetable Shipments

On August 7, Cold Train announced it was suspending refrigerated rail service between the Pacific Northwest and other parts of the country, including Canada, due to slipping performance on the BNSF Railway (BNSF). Cold Train is a pioneer in the express refrigerated intermodal service for fresh and frozen fruits and vegetables. It relied on BNSF to provide the rail component of the intermodal service.

Cold Train began operation in April 2010, shipping about 100 refrigerated containers per month from Washington to the Midwest. By 2013, this amount had risen to almost 700 containers per month of fresh and frozen cargo from Washington and Oregon. In March 2014, Federated Railways purchased Rail Logistics, the operator of Cold Train, with plans to expand the service by adding an additional 1,000 containers to the 400-container inventory.

According to Cold Train, BNSF's on-time reliability fell from 90 percent in November 2013 to less than 5 percent in April, as reported in the Journal of Commerce. In April, BNSF reduced intermodal train service from Washington, which doubled transit times for shipments of fruits and vegetables from 3 to 6 days. Cold Train stated it could no longer afford to provide service due to the additional costs associated with the longer transit times. The Packer reports Cold Train is working with BNSF to explore the feasibility of resuming service, but it is uncertain when service may resume.

Much of BNSF's service problems have been centered on its Northern Corridor between the Midwest and Pacific Northwest where Cold Train primarily operates. Several factors have impeded BNSF's overall rail performance during the past year. An improving economy has increased demand for rail service from many sectors, including intermodal and coal. In addition, steadily growing shipments of crude oil by rail and a record grain harvest in 2013 overwhelmed BNSF's already reduced capacity. Scheduled track maintenance work and a record cold winter complicated the congestion and delays on the network by reducing available capacity even further. As a result, widespread service problems have affected the movement of many different commodities this past year.

Meanwhile, new refrigerated rail services operating on the Union Pacific and south-

ern BNSF rail lines have been less affected than Cold Train, which operates on BNSF's Northern Corridor, as reported in *The Packer*. McKay TransCold began weekly refrigerated service between Wilmington, IL, and Selma, CA, in June and operates over BNSF's Southern Corridor. Tiger Cool began refrigerated service between multiple Southern California locations and destinations in the Midwest and East Coast in February and operates on Union Pacific. Both of these companies offer service similar to Cold Train.

However, neither company has plans to expand operations into Washington State and replace Cold Train's service, according to *The Packer*.

Overall truck shipments of fruits and vegetables were slightly lower—by less than 1 percent—in the 2nd quarter of 2014 than the 2nd quarter of last year. In contrast, overall shipments by rail declined 4 percent

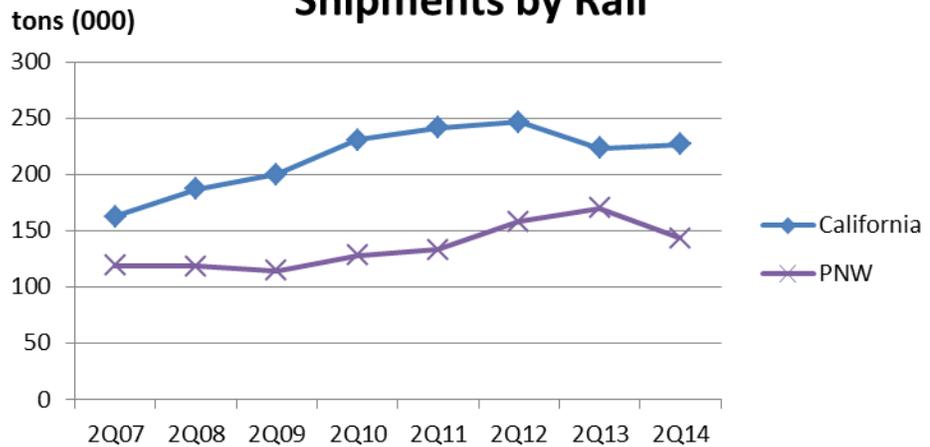
from last year, with all of the decrease attributable to the Pacific Northwest (PNW). Rail shipments from Idaho, Oregon, and Washington decreased during the 2nd quarter, but rail shipments from Arizona, California, Colorado, and Florida increased from the previous year. After steady growth in shipping fruits and vegetables by rail since 2009, 2nd quarter shipments from the PNW declined 16 percent in 2014 from the 2nd quarter of 2013.

Apples are one of the biggest commodities shipped by rail from the PNW, representing almost a quarter of rail shipments. *The Packer* reports the Washington apple industry is anticipating a record harvest for 2014, almost 10 percent above the previous record in 2012. With the loss of Cold Train's rail service, shippers in the Pacific Northwest will have to explore other options, such as shipping more by truck to domestic markets, or looking for additional export opportunities, which require shorter movements to export facilities along the coast.

[Railex](#) utilizes unit trains of refrigerated boxcars between cold storage distribution facilities in Wallula, WA and Delano, CA and Rochester, NY and Jacksonville, FL, though Chicago, IL. According to the Journal of Commerce, Railex unit trains receive priority service from UP and CSX Transportation, with quick crew changes in Chicago using the same locomotives for the entire trip. Therefore Railex has not faced the lengthy service delays experienced by other shippers. Railex service to the Midwest, via Chicago, is planned for later in 2014. Adam.Sparger@ams.usda.gov

Source: *US Refrigerated Rail Operators Confident Despite Cold Train's Death by Rail Delays*, Mark Szakonyi [Journal of Commerce](#) August 12, 2014 <http://railex.com/news/us-refrigerated-rail-operators-confident-despite-cold-trains-death-by-rail-delays/>

2nd Quarter Fruit and Vegetable Shipments by Rail



Quarterly Overview

Fruit and Vegetable Shipments

Reported U.S. truck shipments of fresh produce during the 2nd quarter 2014 were 8.96 million tons, 15 percent higher than the previous quarter and about the same as the same quarter last year.

Shipments from Mexico were highest in the 2nd quarter, totaling more than 2.45 million tons and accounting for 27 percent of the total reported shipments of fresh fruits and vegetables. Shipments from California were more than 2.12 million tons—24 percent of the reported shipments. Movements from the Pacific Northwest and Florida totaled more than 1.2 million tons, or 14 percent each of the reported total.

The following top 5 commodities accounted for 43 percent of the reported truck movements during the 2nd quarter 2014:

- ▶ Potatoes (12 percent)
- ▶ Watermelon, seedless (11 percent)
- ▶ Apples (7 percent)
- ▶ Onions, dry (6 percent)
- ▶ Tomatoes (5 percent)

Truck Rates

The table below provides a snapshot of quarterly rates for U.S. produce shipments over 4 mileage categories—0–500, 501–1,500, 1,501–2,500, and 2,500+ miles. U.S. average truck rates are weighted by regional rates and volumes. Compared with the previous quarter, each mileage category experienced an increase except the 0–500 mile range. The short-haul category (501–1,500 miles) saw the largest decrease, at 15 percent. When compared with the 2nd quarter 2013, each category increased except the short-haul category (0–500 miles); the largest increase was in the long-haul category at 39 percent.

U.S. Average Fruit and Vegetable Truck Rates per Mile				
	0–500 miles	501–1,500 miles	1,501–2,500 miles	2,500 miles +
Q2 2013	4.37	2.60	2.26	1.05
Q3 2013	5.73	2.62	2.25	1.42
Q4 2013	4.56	2.31	2.31	1.29
Q1 2014	4.42	2.31	2.27	1.32
Q2 2014	4.32	2.66	2.32	1.45
Q1 Change from Previous Quarter	-2 percent	15 percent	3 percent	10 percent
Q1 Change from Same Quarter Last Year	-1 percent	2 percent	3 percent	39 percent

Note: Due to the Government shutdown, USDA was unable to collect truck rate data October 1–16, 2013. This may have impacted October and quarterly averages for rates, causing the reported averages in this report to be slightly higher or lower than the true amounts. The possibility of this error should be taken into consideration when making comparisons between time periods.

Diesel Fuel

During the 2nd quarter 2014, the U.S. diesel fuel price averaged \$3.94 per gallon—0.7 percent lower than last quarter but 1.6 percent higher than the same quarter last year.

Regulatory News and Updates

The Impact of Driver Compensation on Commercial Motor Vehicle Safety: On August 29, 2014, the Federal Motor Carrier Safety Administration initiated [The Impact of Driver Compensation on Commercial Motor Vehicle Safety Survey](#). Comments are due October 28, 2014 on the information collection, and can be viewed in the [docket FMCSA-2014-0325](#). The primary purpose of the study will be to analyze the possible unintended safety consequences of the various methods by which Commercial Motor Vehicle (CMV) drivers in the sample are compensated. Should the study show that there is a relationship between the methods drivers are paid and the methods' effect on safe driving performance, a potential benefit of the study will be to provide CMV carrier companies with information that will help them make more informed decisions about safe operations. In addition to the primary purpose of the study, a number of other potentially potential confounding variables will be assessed. These variables include the following:

- Type of commercial motor vehicle operation (long-haul, short-haul, or line-haul) by size of carrier (very small, small, medium or large)
- Whether for-hire, private, or owner operated and whether the carrier can be characterized as a truckload, less-than-truckload, regional, tanker, or other type of carrier
- Number of power units
- Average length of haul
- Primary commodities carried
- Number of regular, full-time drivers the carrier employs
- Average driving experience, in years, of drivers working for the companies included in the sample

This data will be used to demonstrate possible relationships of variables as well as determine if the variables may contribute to unintended safety consequences. Unintended safety consequences include driver out-of-service rates, vehicle out-of-service rates, and crash rates.

Enhancements to the Motor Carrier Safety Measurement System Web Site: On July 24, 2014, FMCSA [announced enhancements to the display of information on the public Safety Measurement System](#) web site and responded to comments in the [docket FMCSA-2013-0392](#) that were made in response to the FMCSA's Federal Register Notice published on November 5, 2013. The enhancements are a continuation of the Agency's efforts, first announced in April 2010, to provide the motor carrier industry and other safety stakeholders with more comprehensive, informative, and regularly updated safety performance data. On August 22, 2014, ten truck and bus trade associations asked the Secretary of Transportation ["to direct FMCSA to remove motor property and passenger carriers' Compliance, Safety, Accountability Safety Measurement System scores from public view,"](#) citing the need for improvements identified by the United States Government Accountability Office report, [Federal Motor Carrier Safety: Modifying the Compliance, Safety, Accountability Program Would Improve The Ability to Identify High Risk Carriers, GAO-14-114, February 3, 2014](#). On February 5, 2014 FMCSA announced [new research shows that the Safety Measurement System is an improvement for identifying at-risk companies](#).

Comments on Proposed Regulations to Prohibition of Coercion of Commercial Motor Vehicle Drivers: The [docket FMCSA-2012-0377](#) includes the 94 comments received by August 11, 2014 on FMCSA's [proposed regulations that prohibit motor carriers, shippers, receivers, or transportation intermediaries from coercing drivers](#) to operate commercial motor vehicles (CMVs) in violation of certain provisions of the Federal Motor Carrier Safety Regulations (FMCSRs)--including drivers' hours-of-service limits and the commercial driver's license (CDL) regulations and associated drug and alcohol testing rules--or the Hazardous Materials Regulations (HMRs). In addition, the NPRM would prohibit anyone who operates a CMV in interstate commerce from coercing a driver to violate the commercial regulations. This proposal includes procedures for drivers to report incidents of coercion to FMCSA, rules of practice the Agency would follow in response to allegations of coercion, and describes penalties that may be imposed on entities found to have coerced drivers. [Owner-Operator Independent Drivers Association](#) and [American Trucking Associations](#), among others, provided comments.

Comments on the Requirement to use Electronic Logging Devices: The [docket FMCSA-2010-0167](#) includes 2,216 comments received by June 26, 2014 on FMCSA's [proposal to require interstate commercial truck and bus companies to use Electronic Logging Devices](#). The proposed rulemaking would significantly reduce the paperwork burden associated with hours-of-service recordkeeping for interstate truck and bus drivers and improve the quality of logbook data. It will ultimately reduce hours-of-service violations by making it more difficult for drivers to misrepresent their time on logbooks and avoid detection by FMCSA and law enforcement personnel. [Owner-Operator Independent Drivers Association](#), [American Trucking Associations](#), [Truckload Carriers Association](#), [Agricultural Retailers Association](#), and [National Private Truck Council](#) and very large number of drivers, among others, provided comments.

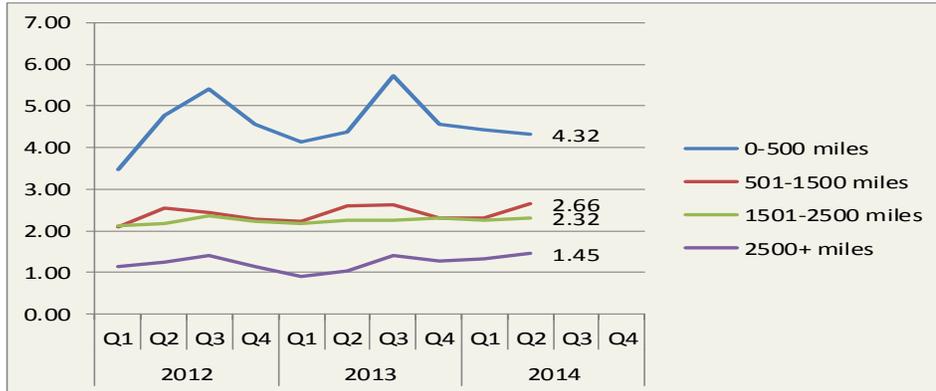
Sanitary Food Transportation Act Comments: The U.S. Food and Drug Administration has posted 150 of the comments it received by July 30, 2014 on a proposed rule that would require certain shippers, receivers, and carriers who transport food by motor or rail vehicles to take steps to prevent the contamination of human and animal food during transportation. The proposed regulation would establish criteria for sanitary transportation practices, such as properly refrigerating food, adequately cleaning vehicles between loads, and properly protecting food during transportation. Comments from the [Owner-Operator Independent Drivers Association](#), [American Trucking Associations](#), [Agricultural and Food Transporters Conference](#), [Association of American Railroads and the American Short Line and Regional Railroad Association](#), [Produce Marketing Association](#), [Western Growers](#), [United Fresh Produce Association](#), [Northwest Horticultural Council](#), [Florida Fruit and Vegetable Association](#), [Fresh Produce Association of the Americas](#), and [National Association of State Departments of Agriculture](#), among others, can be viewed in the [docket FDA-2013-N-0013](#).

Environmental Protection Agency Provides Waiver for California Air Resources Board: On July 30, 2014, the Environmental Protection Agency (EPA) [granted the California Air Resources Board's \(CARB\) request for a waiver of Clean Air Act preemption to enforce provisions of its Heavy-Duty Tractor-Trailer Greenhouse Gas Regulations](#) ("HD GHG Regulations") applicable to new 2011 through 2013 model year (MY) Class 8 tractors equipped with integrated sleeper berths (sleeper-cab tractors) and to new 2011 and subsequent MY dry-van and refrigerated-van trailers that are pulled by such tractors on California highways. This decision is issued under the authority of the Clean Air Act ("CAA" or "the Act"). It applies to all vehicles and trailers that chose to operate within the State of California, regardless of where they are registered or based. Documents and comments, including those of the [Owner-Operator Independent Drivers Association](#) and [American Trucking Associations](#) can be viewed in the [docket EPA-HQ-OAR-2013-0491](#).

National Summary

U.S. Truck Rates

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



Source: Agricultural Marketing Service, Fruit and Vegetable Programs, Market News Division

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

	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	*Annual
2014	2.31	2.66			2.49
2013	2.24	2.60	2.62	2.31	2.44
2012	2.10	2.54	2.45	2.29	2.35
2011	2.02	2.60	2.77	2.26	2.41
2010	1.82	2.21	2.33	1.94	2.08
2009	1.85	1.99	2.02	1.86	1.93
2008	2.02	2.56	2.77	2.24	2.40
2007	1.89	2.23	2.25	2.03	2.10
2006	1.92	2.10	2.21	2.02	2.06

*Annual: Weighted average rate for all 4 quarters.

Source: Agricultural Marketing Service, Fruit and Vegetable Programs, Market News Division

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

Origin	1st Qtr 2014			2nd Qtr 2014		
	Jan	Feb	Mar	April	May	June
Arizona	2.44	n/a	n/a	n/a	n/a	n/a
California	2.50	2.54	2.73	2.93	2.87	3.10
Florida	2.16	2.21	2.43	2.71	3.24	3.70
Great Lakes	3.19	3.24	3.29	3.24	3.29	3.52
Mexico-Arizona	2.51	2.45	2.41	2.66	2.74	2.69
Mexico-Texas	2.23	2.32	2.42	2.52	2.49	2.58
New York	1.96	2.01	2.11	1.90	1.65	1.54
PNW	2.14	2.12	1.86	1.79	1.58	1.52
Southeast	2.92	2.95	3.07	3.16	3.32	3.95
Texas	2.34	2.43	2.50	2.63	2.62	2.85

Source: Agricultural Marketing Service, Fruit and Vegetable Programs, Market News Division

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

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

Truck Rates for Selected Routes

Table 3: Origin-Destination Truck Rates for Selected Routes , 2nd Quarter 2014 (\$/Mile)

Origin	Destination									
	Atlanta	Baltimore	Boston	Chicago	Dallas	Los Angeles	Miami	New York	Philadelphia	Seattle
Arizona	2.44	2.53	2.53	.	.	6.08	.	2.6	2.56	.
California	2.66	2.63	2.59	2.42	2.79	5.57	2.55	2.66	2.65	3.01
Florida	3.14	3.71	3.16	2.62	2.69	1.18	3.29	3.41	3.32	.
Great Lake	3.09	3.26	3.16	3.89	2.9	.	2.93	3.96	3.61	.
Mexico-AZ	2.59	.	2.73	2.48	2.81	2.57	2.51	2.83	2.82	.
Mexico-TX	2.67	2.64	2.77	2.39	2.94	1.97	2.42	2.74	2.7	.
New York	2.02	4.06	10.23	1.25	.	.	1.86	10.31	5.08	.
Other	2.54	2.51	2.67	2.35	2.7	1.79	2.1	2.54	2.5	.
PNW	2.31	2.33	2.41	2.12	2.36	1.68	2.28	2.48	2.31	8.74
Southeast	5.05	4.05	3.46	3.25	.	.	3.05	3.91	3.91	.
Texas	2.96	2.8	2.93	2.61	3.69	2.11	2.56	2.93	2.88	.

Source: AMS, Fruit and Vegetable Programs, Market News Division, Fruit and Vegetable Truck Rate Reports

Truck Rates for Selected Routes

Table 4: Origin-Destination Truck Rates for Selected Routes , 2nd Quarter 2014 (\$/Truck)

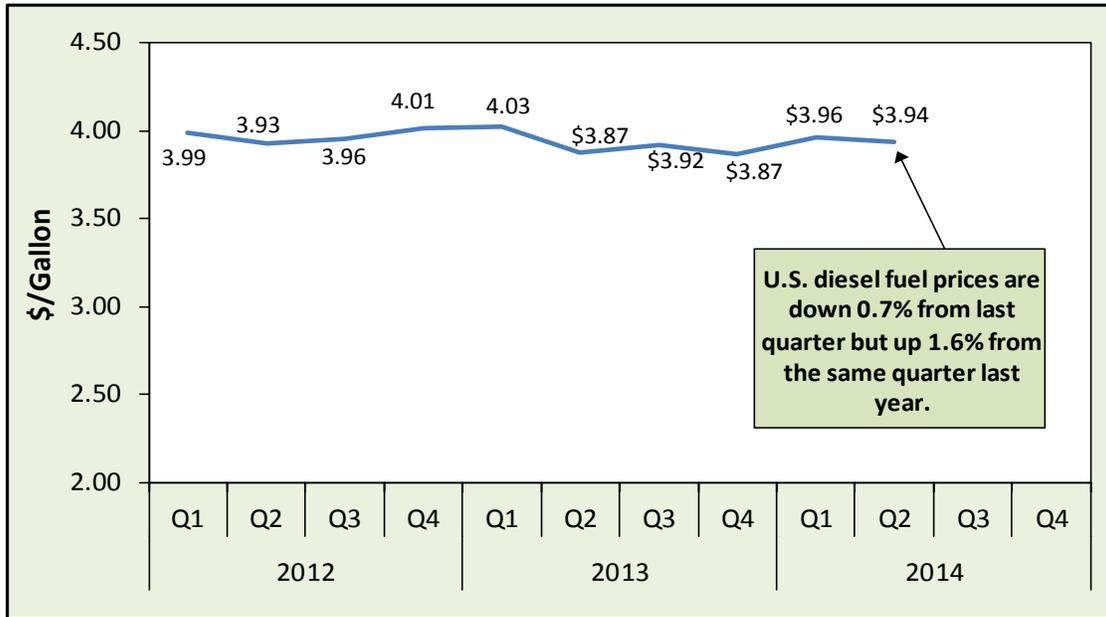
Origin	Destination									
	Atlanta	Baltimore	Boston	Chicago	Dallas	Los Angeles	Miami	New York	Philadelphia	Seattle
Arizona	5,117	6,583	7,350	.	.	913	.	7,033	6,783	.
California	5,974	7,170	7,888	5,089	4,182	966	7,172	7,559	7,350	3,203
Florida	1,428	3,411	4,256	3,086	2,929	2,963	839	3,860	3,543	.
Great Lake	2,967	3,512	4,044	1,189	3,261	.	4,732	3,543	3,281	.
Mexico-AZ	4,664	.	7,378	4,469	2,754	1,440	5,705	7,069	6,769	.
Mexico-TX	3,069	4,721	6,100	3,419	1,469	3,158	3,700	5,473	5,129	.
New York	2,023	1,338	1,738	1,054	.	.	2,692	1,546	1,169	.
Other	2,469	3,517	3,538	2,247	1,712	1,673	4,297	3,501	3,440	.
PNW	5,392	5,762	6,632	3,790	4,354	1,555	6,829	6,341	5,832	1,223
Southeast	1,263	2,153	3,153	2,783	.	.	1,922	2,858	2,485	.
Texas	3,069	4,721	6,100	3,419	1,469	3,158	3,700	5,473	5,129	.

Source: AMS, Fruit and Vegetable Programs, Market News Division, Fruit and Vegetable Truck Rate Reports

U.S. Diesel Fuel Prices

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



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

Table 5: 2nd Quarter 2014 Average Diesel Fuel Prices (All Types - \$/Gallon)

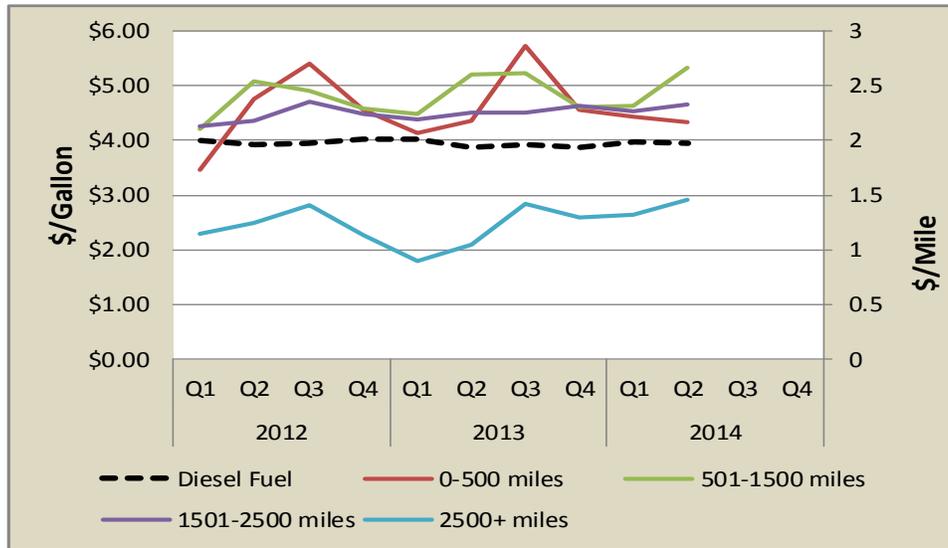
Location	Price	Change From	
		Last Quarter	Same Qtr Last Year
East Coast	4.03	-0.05	0.15
New England	4.15	-0.12	0.14
Central Atlantic	4.14	-0.11	0.20
Lower Atlantic	3.92	0.01	0.11
Midwest	3.90	-0.05	0.02
Gulf Coast	3.80	0.01	0.02
Rocky Mountain	3.94	0.02	0.10
West Coast	4.02	0.02	0.04
California	4.10	0.02	0.05
U.S.	3.94	-0.03	0.06

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

Relationship Between Diesel Fuel & Truck Rates

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

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



Sources:

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

Truck Rate: Agricultural Marketing Service, Fruit and Vegetable Programs, Market News Division

Table 6: Average Diesel Fuel Prices and Truck Rates

		Diesel Fuel (\$/gallon)	Truck Rates (\$/mile) 501-1500 miles	% Change From:			
				Last Qtr		Same Qtr Last Year	
				Diesel	Truck	Diesel	Truck
2012	Q1	3.99	2.10	3%	-7%	11%	4%
	Q2	3.93	2.54	-2%	21%	-2%	-2%
	Q3	3.96	2.45	1%	-4%	2%	-12%
	Q4	4.01	2.29	1.5%	-6%	4%	1%
2013	Q1	4.03	2.24	0%	-2%	1%	7%
	Q2	3.87	2.60	-4%	16%	-1%	2%
	Q3	3.92	2.61	1%	0%	-1%	7%
	Q4	3.87	2.27	-1%	-12%	-4%	1%
2014	Q1	3.96	2.31	2%	2%	-2%	3%
	Q2	3.94	2.65	-0.7%	14%	1.6%	2%
	Q3						
	Q4						

Sources:

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

Truck Rates: Agricultural Marketing Service, Fruit and Vegetable Programs, Market News Division

2nd Quarter 2014 Comparison Analysis

Diesel fuel prices averaged \$3.94 per gallon this quarter, 1 percent lower than last quarter and 2 percent higher than the same quarter last year. Average truck rates for shipments between 501 and 1,500 miles were \$2.66 per mile, 15 percent higher than the previous quarter and 2 percent higher than the same quarter last year.

The effect of a change in diesel fuel prices is compounded for produce haulers because the fuel is needed to run the refrigeration unit as well as the truck.

In many cases, trucking companies and owner-operator independent drivers are not able to pass on the full increase in fuel cost to shippers due to existing contracts, competition, and the need for backhaul cargo to cover at least some of the costs of operation. In addition, some shippers offer enough business to a company that the fuel surcharge is waived. In these cases, the total surcharge collected may not be reported or fully reimbursed to those paying for the fuel.

Quarterly Truck Availability

Table 7: U.S. Fresh Fruit and Vegetable Truck Availability, 2nd Quarter 2014

Region ¹	Commodity ¹	Truck Availability													
		Surplus - 1			Slight Surplus - 2			Adequate - 3			Slight Shortage - 4			Shortage - 5	
		Week Ending ¹													
		4/1	4/8	4/15	4/22	4/29	5/6	5/13	5/20	5/27	6/3	6/10	6/17	6/24	
CALIFORNIA, CENTRAL AND WESTERN ARIZONA															
Central San Joaquin Valley, CA	Apricots, Blueberries, Cherries; Iceberg, Leaf, and Romaine Lettuce, Nectarines, Peaches	3	3	4	4	3	3	3	3	3	3	3	3	3	
Imperial, Palo Verde, and Coachella Valleys, CA, and Central and Western AZ	Iceberg, Leaf, and Romaine Lettuce	3	3	4											
Imperial Valley, CA	Onions ²					5	5	5	5	5	5	5			
Imperial and Coachella Valleys, CA	Corn, Eggplant, Grapes, Melons, Peppers									3	4	4	3	3	
Kern District, CA	Carrots, Potatoes	3	3	4	4	3	3	3	3	3	4	4	3	3	
Salinas-Watsonville, CA	Broccoli, Cauliflower, Iceberg, Leaf, and Romaine Lettuce, Raspberries, Strawberries	3	3	4	4	3	3	3	3	3	4	3	3	3	
San Joaquin Valley, CA	Onions ²										5	5	5	5	
Santa Maria, CA	Broccoli, Cauliflower, Iceberg, Leaf, and Romaine Lettuce, Raspberries, Strawberries	3	3	4	4	3	3	3	3	3	4	3	3	3	
South District, CA	Avocados, Citrus, Raspberries, Strawberries	3	3	4	4	3	3	3	3	3	3	3	3	3	
PACIFIC NORTHWEST (ID, OR, WA)		4/1	4/8	4/15	4/22	4/29	5/6	5/13	5/20	5/27	6/3	6/10	6/17	6/24	
Columbia Basin, WA	Onions, Potatoes	3	3	3	3	3	3	3	3	3	3	3	3	3	
Idaho and Malheur County, OR	Onions	4	4	4											
Northwestern WA	Potatoes	5	5	5	5	5									
Upper Valley, Twin Falls-Burley District, ID	Potatoes	4	4	4	3	3	3	3	3	3	3	3	3	3	
Yakima Valley & Wenatchee District, WA	Apples, Pears	3	3	4	4	4	3	3	3	3	3	3	3	3	
FLORIDA		4/1	4/8	4/15	4/22	4/29	5/6	5/13	5/20	5/27	6/3	6/10	6/17	6/24	
Statewide	Potatoes	3	3	3	3	3	3	3	5	5	5	5	5	5	
Central and South	Berries, Melons, Mixed Veg, Tomatoes	4	4	5	5	5	5	5	5	4					
Central and North	Blueberries, Melons, Mixed Veg, Tomatoes			3	3	3	5	4	4		4	3	4	5	
South	Melons	3	3	5	5	5	5	4	4	3	4				
West District	Tomatoes												4	5	
GREAT LAKES (MI & WI)		4/1	4/8	4/15	4/22	4/29	5/6	5/13	5/20	5/27	6/3	6/10	6/17	6/24	
Michigan	Apples	3	3	3	3	3	3	3	3	3	3	3	3	3	
Central Wisconsin	Onions, Potatoes	3	3	3	3	3	2	2	2	3	2	3	3	3	
MEXICO BORDER CROSSINGS		4/1	4/8	4/15	4/22	4/29	5/6	5/13	5/20	5/27	6/3	6/10	6/17	6/24	
Through Nogales, AZ	Grapes, Mangoes, Melons, Mixed Veg, etables, Tomatoes	3	3	5	4	4	4	3	3	3	3	3	3	3	
Through Texas	Carrots, Citrus, Mangoes, Mixed Fruit and Vegetables, Onions, Tomatoes	4	4	5	4	3	4	4	4	4	5	5	4	4	
TEXAS		4/1	4/8	4/15	4/22	4/29	5/6	5/13	5/20	5/27	6/3	6/10	6/17	6/24	
Lower Rio Grande Valley, TX	Cabbage, Citrus, Herbs, Onions, Watermelons	4	4	5	4	3	4	4	4	4	5	5			
South Texas	Watermelons												4		
Statewide	Watermelons													4	
SOUTHEAST (GA, SC & NC)		4/1	4/8	4/15	4/22	4/29	5/6	5/13	5/20	5/27	6/3	6/10	6/17	6/24	
South Georgia	Bell Peppers, Blueberries, Cabbage, Carrots, Corn, Cucumbers, Eggplant, Greens, Melons, Squash	3	3	3	3	3	3	3	3	3	3	3	3	3	
Vidalia District Georgia	Onions					3	3	3	3	3	3	3	3	3	
South Carolina	Melons, Tomatoes													5	
South Carolina	Peaches											3	3	3	
Eastern North Carolina	Sweet Potatoes	5	5	5	5	3	5	4	5	5	5	4	5	5	

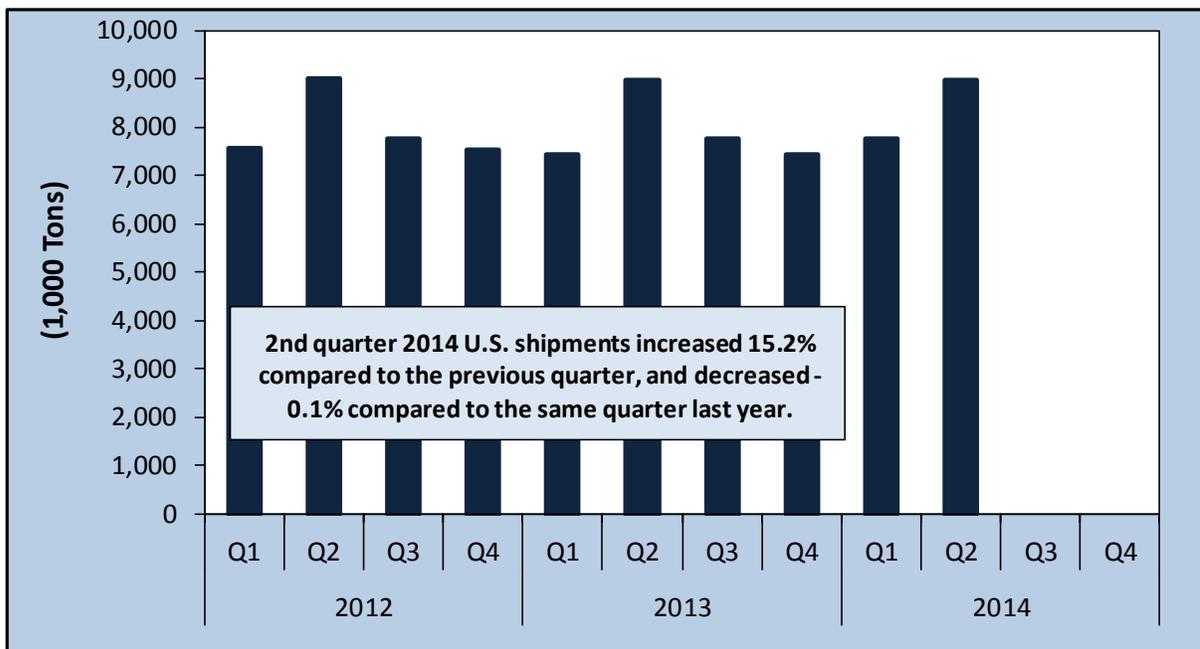
¹ Regions reported and commodities shipped vary by week, month, season, and year. Within a region, truck availability can vary by commodity and destination.

² Generally flatbeds, open trucks, or dry vans are used to transport Imperial and San Joaquin Valley, CA onions.

Source: weekly *Fruit and Vegetable Truck Rate Report*, Agricultural Marketing Service, Fruit and Vegetable Programs, Market News Division

Reported U.S. Shipments

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



Source: Agricultural Marketing Service, Fruit and Vegetable Programs, Market News Division

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

Year	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter	Annual
2014	7,779	8,965			
2013	7,451	8,972	7,762	7,444	31,629
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	6,962	29,551
2005	6,877	8,324	7,737	7,387	30,325
2004	6,867	8,331	6,876	6,732	28,807
2003	6,824	8,013	7,043	6,684	28,564
2002	6,787	8,094	6,414	6,460	27,756
2001	6,822	8,144	6,314	6,471	27,751
2000	6,776	8,155	6,916	6,395	28,242

Source: Agricultural Marketing Service, Fruit and Vegetable Programs, Market News Division

Reported Shipments by Selected Commodities

Table 9: Reported Top 10 Commodity Shipments for 2nd Quarter 2014 (1,000 Tons)

Commodity	2nd Quarter 2014	Previous Quarter	Same Quarter Last Year	Current Quarter as % change from:	
				Previous Qtr	Same Qtr Last Year
Potatoes	1,082	1,119	1,106	-3%	-2%
Watermelons, seedless	1,000	68	870	-	15%
Apples	641	861	628	-26%	2%
Onions, dry	542	503	528	8%	3%
Tomatoes	435	469	532	-7%	-18%
Corn-sweet	370	104	415	256%	-11%
Strawberries	365	266	381	38%	-4%
Lettuce, iceberg	333	367	362	-9%	-8%
Cucumbers	232	255	233	-9%	0%
Lettuce, Romaine	220	278	221	-21%	0%

Source: Agricultural Marketing Service, Fruit and Vegetable Programs, Market News Division

Regional Markets

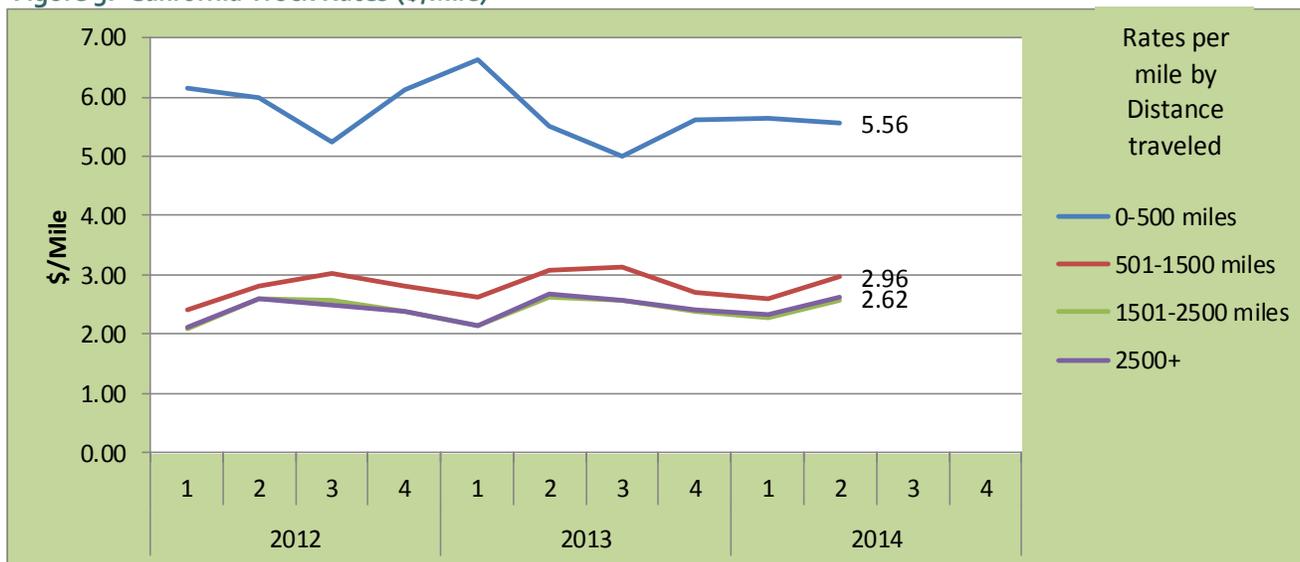
California

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

Commodity	2nd Quarter 2014	Share of California Total	Previous Quarter	Same Quarter Last Year	Current Quarter as % change from:	
					Previous Qtr	Same Qtr Last Year
Strawberries	355	17%	115	366	208%	-3%
Lettuce, Iceberg	301	14%	67	325	349%	-7%
Lettuce, Romaine	206	10%	57	211	261%	-2%
Celery	162	8%	120	153	35%	6%
Onions dry	112	5%	8	78	-	43%
Top 5 Total	1,135	53%	367	1,133	209%	0%
California Total	2,125	100%	691	2,369	208%	-10%

Source: Agricultural Marketing Service, Fruit and Vegetable Programs, Market News Division
 "-" indicates no reported shipments during the quarter.

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



Source: Agricultural Marketing Service, Fruit and Vegetable Programs, Market News Division

Figure 6: California Truck Overview

Region/Reporting District	Diesel Fuel	Truck Rate 501 to 1500 miles	April	May	June
			Monthly Rating		
	\$/per gallon	\$/per mile	1=Surplus to 5=Shortage		
Regional Average	\$4.10	\$2.97	3.00	2.94	3.00
Central San Joaquin Valley, CA			3.40	3.00	3.00
Imperial, Palo Verde, and Coachella Valleys, CA, and			3.33		
Central and Western AZ					
Kern District, CA			3.00	3.00	3.00
Salinas-Watsonville, CA					3.00
San Joaquin Valley, CA			3.00		
Santa Maria, CA			3.00	3.00	3.00
South District, CA			2.25	2.75	3.00

n/a: availability data not reported

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

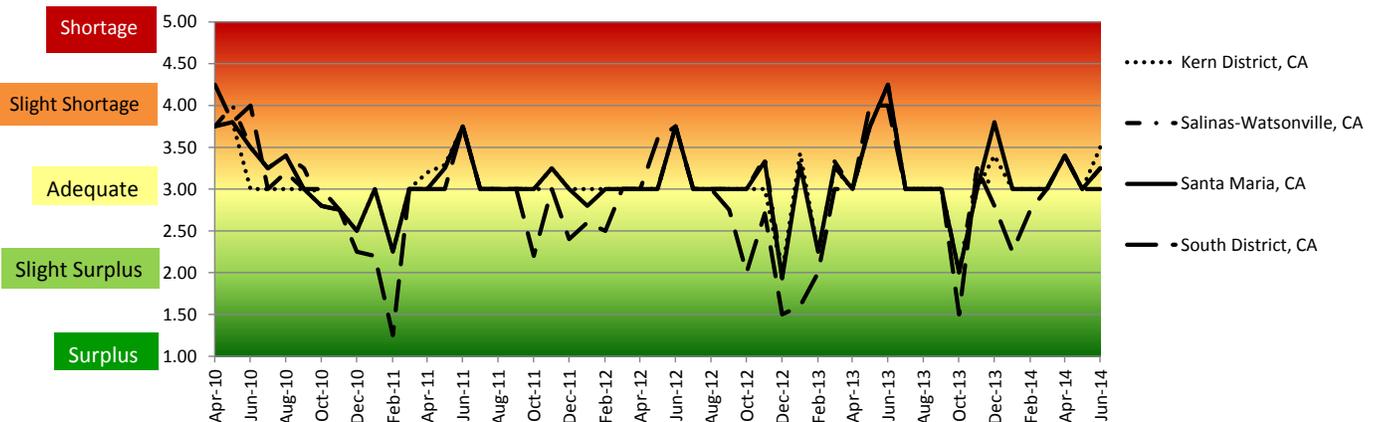
For the purpose of this report the California sub-group of the West Coast PAD District 5 was used to represent the diesel fuel price.

Volume: Total reported shipments of fruits and vegetables from California during the second quarter of 2014 total 2.12 million tons, a 10-percent decrease from the same quarter in 2013. The sum of the top five commodities was relatively unchanged from the same quarter last year, representing small decreases in strawberries and lettuce as dry onions jumped 43 percent. Drought conditions probably affected supplies of California’s leading commodities. However, dry onion supplies were good during the second quarter, despite the drought.

Rates: The quarterly average truck rate for shipments between 501 and 1,500 miles was \$2.97 per mile, 15 percent higher than the previous quarter but 4 percent lower than same quarter last year.

Truck Overview: Diesel fuel prices averaged \$4.10 per gallon, one cent higher than last quarter and 1.1 percent higher than the same period last year. On average, truck availability for California was mostly average during the quarter, with a slight surplus for the South District in April and May.

Fig 7: Refrigerated Truck Availability Monthly Ratings for California



Pacific Northwest (PNW)

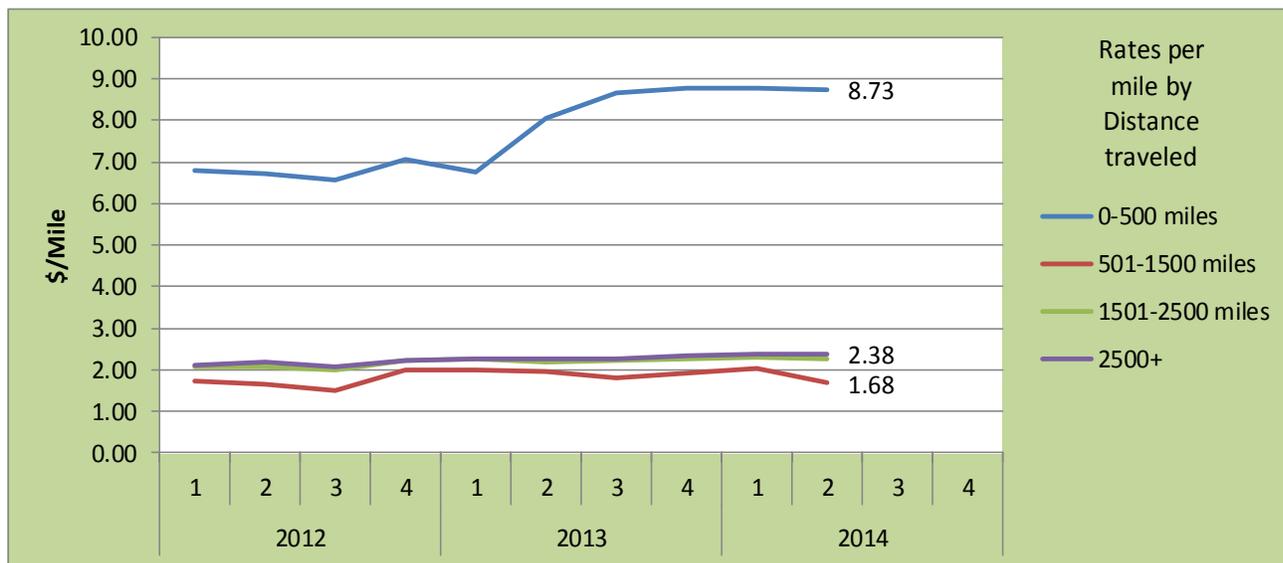
Table 11: Reported Top 5 Commodities Shipped from PNW (1,000 tons)

Commodity	2nd Quarter 2014	Share of PNW Total	Previous Quarter	Same Quarter Last Year	Current Quarter as % change from:	
					Previous Qtr	Same Qtr Last Year
Apples	544	43%	710	615	-23%	-12%
Potatoes	456	36%	476	487	-4%	-6%
Onions, dry	96	8%	360	107	-73%	-11%
Pears	86	7%	172	68	-50%	27%
Cherries	76	6%	-	38	-	100%
Top 5 Total	1,258	99%	1,718	1,315	-27%	-4%
PNW Total	1,270	100%	1,719	1,325	-26%	-4%

Source: Agricultural Marketing Service, Fruit and Vegetable Programs, Market News Division

Note: "-" indicates no reported shipments during the quarter.

Figure 8: PNW Truck Rates (\$/Mile)



Source: Agricultural Marketing Service, Fruit and Vegetable Programs, Market News Division

Figure 9: PNW Truck Overview

Region/Reporting District	Diesel Fuel	Truck Rate 501 to 1500 miles	April	May	June
			Monthly Rating		
	\$/per gallon	\$/per mile	1=Surplus to 5=Shortage		
Regional Average	\$3.93	\$1.68	3.84	3.00	3.00
Columbia Basin, WA			3.00	3.00	3.00
Idaho and Malheur County, OR			4.00		
Northwestern WA			5.00		
Upper Valley, Twin Falls-Burley District, ID			3.60	3.00	3.00
Yakima Valley & Wenatchee District, WA			3.60	3.00	3.00

n/a: availability data not reported

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

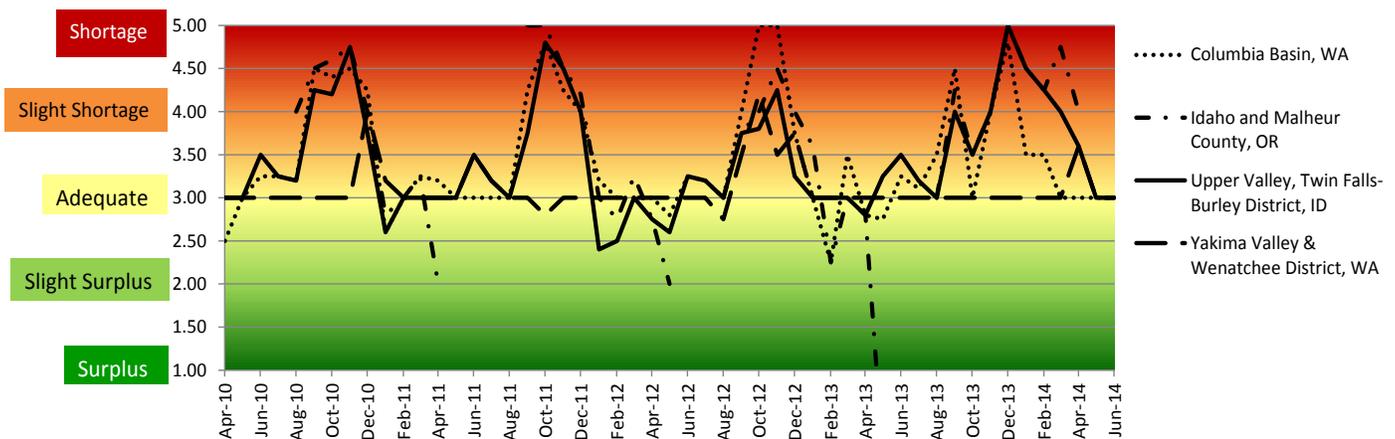
For the purpose of this report the West Coast less California District was used to represent the diesel fuel price for PNW.

Volume: Total reported shipments of fruits and vegetables from the Pacific Northwest (PNW) during the second quarter of 2014 decreased 4 percent from the same quarter in 2013; the sum of the top five commodities decreased 4 percent as well. Shipments of apples, potatoes, and dry onions were each down during the quarter, while pear and cherry shipments increased. In fact, this year’s cherry harvest was expected to be the highest on record, far exceeding the rain-hampered production of 2013, according to *The Packer*. Summer supplies of apples this year were below last year and the five-year average, probably causing the 12 percent decrease in shipments during the second quarter.

Rates: The quarterly average truck rate for shipments between 501 and 1,500 miles was \$1.68 per mile, 18 percent lower than the previous quarter and 14 percent lower than same quarter last year.

Truck Overview: Diesel fuel prices averaged \$3.93 per gallon, about the same as the same period last year. On average, truck availability for the Columbia Basin and the Yakima Valley, WA, and the Upper Valley, Twin Falls-Burley District, ID, was generally adequate. Idaho and Malheur Counties, OR, experienced a slight truck shortage in April and the Northwestern Washington region experienced a shortage in April. Data were not available for these two regions in May and June.

Fig 10: Refrigerated Truck Availability Monthly Ratings for the Pacific Northwest



Mexico Border Crossings

Table 12: Reported Top 5 Commodities Shipped from Mexico (1,000 tons)

Commodity	2nd Quarter 2014	Share of Mexico Total	Previous Quarter	Same Quarter Last Year	Current Quarter as % change from:	
					Previous Qtr	Same Qtr Last Year
Watermelons, seedless	330	13%	68	275	385%	20%
Tomatoes, Plum Type	188	8%	199	166	-6%	13%
Tomatoes	181	7%	274	193	-34%	-6%
Cucumbers	155	6%	237	152	-35%	2%
Grapes	148	6%	-	140	-	6%
Top 5 Total	1,001	41%	778	926	29%	8%
Mexico Total	2,454	100%	2,464	2,306	-0.4%	6%

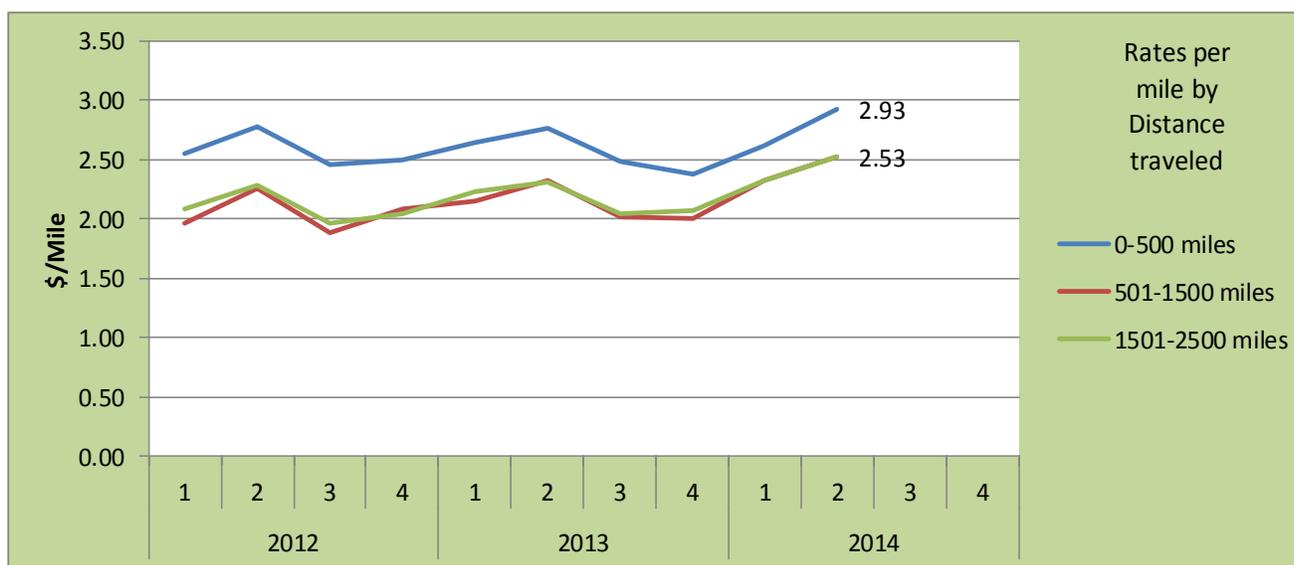
Source: Agricultural Marketing Service, Fruit and Vegetable Programs, Market News Division

Note: "-" indicates no reported shipments during the quarter.

Table 13: Top 5 Commodities Shipped to U.S from Mexico by State of Entry (1,000 tons)

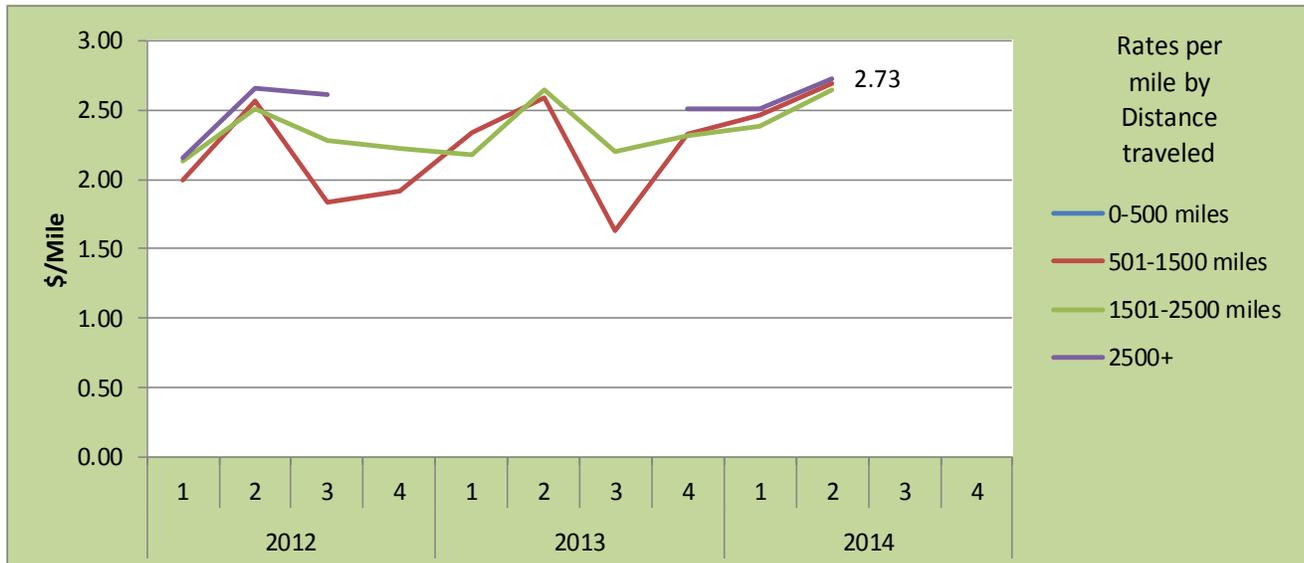
Texas		California		Arizona	
Avocados	128	Tomatoes, Plum type	38	Watermelons, Seedless	330
Mangoes	96	Misc. tropical	35	Grapes	145
Limes	89	Onions, green	32	Tomatoes, Plum Type	96
Tomatoes	88	Cucumbers	28	Cucumbers	82
Watermelons	88	Peppers, Other	19	Tomatoes	78
Other	530	Other	177	Other	359
Total	1,018	Total	328	Total	1,090

Figure 11: Mexico - Texas Truck Rates (\$/Mile)



Source: Agricultural Marketing Service, Fruit and Vegetable Programs, Market News Division

Figure 12: Mexico - Arizona Truck Rates (\$/Mile)



Source: Agricultural Marketing Service, Fruit and Vegetable Programs, Market News Division

Figure 13: Mexico Border Truck Overview

Region/Reporting District	Diesel Fuel	Truck Rate	April	May	June
			Monthly Rating		
	\$/per gallon	\$/per mile	1=Surplus to 5=Shortage		
Regional Crossing Average			3.90	3.63	3.75
Through Texas	\$3.80	\$2.52	3.80	3.25	3.00
Through Nogales, AZ	\$3.93	\$2.69	4.00	4.00	4.50

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

For the purpose of this report the Gulf Coast PAD District 3 was used to represent the diesel fuel price through Texas.

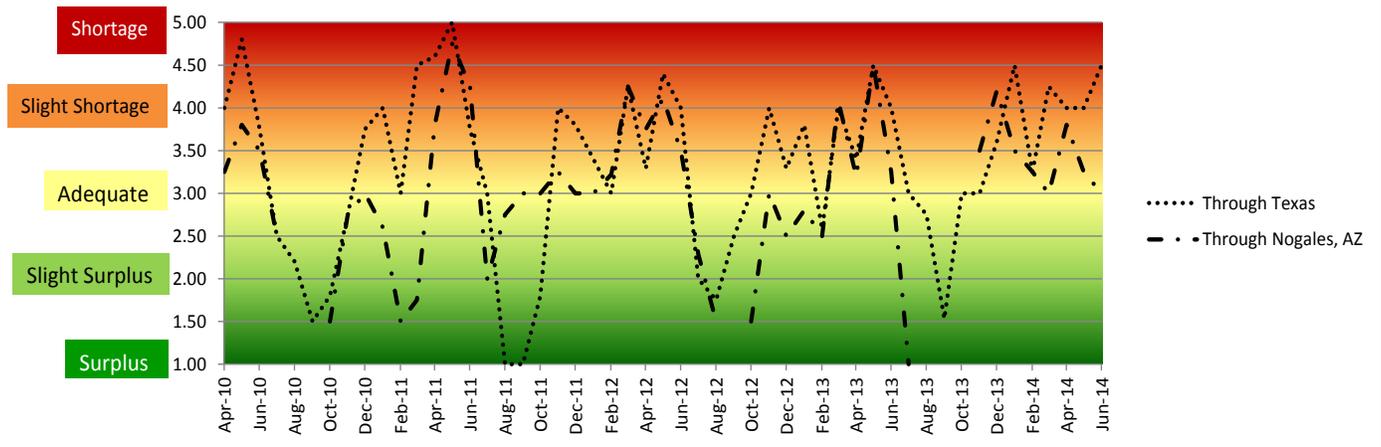
For the purpose of this report the West Coast less California District was used to represent the diesel fuel price through Arizona.

Volume: Total reported shipments of fruits and vegetables from Mexico during the 2nd quarter of 2014 increased 6 percent from the same quarter in 2013, with the sum of the top 5 commodities also increasing 6 percent from last year. Shipments of seedless watermelons increased a notable 20 percent to 330,000 tons, marking the largest quarterly shipment on record. Shipments of Mexican watermelons typically peak in the second quarter of each year as warmer temperatures increase demand. Mexican watermelon production is able to ship earlier than domestic production in the Southern United States.

Rates: Truck rates for shipments between 501 and 1,500 miles through the Texas border crossings averaged \$2.52 per mile, up 9 percent from last quarter and 8 percent higher than the same quarter last year. Rates for shipments between 501 and 1,500 miles through the Arizona border crossings averaged \$2.69 per mile, up 10 percent from last quarter and 4 percent higher than the same quarter last year.

Truck Overview: Diesel fuel prices for border crossings through Texas averaged \$3.80 per gallon, 1 cent higher than the previous quarter and 1 percent higher than the same quarter in 2013. Diesel fuel prices for border crossings through Arizona averaged \$3.93 per gallon, 1 cent higher than the previous quarter and 1 percent higher than the same period in 2013. Truck availability was mostly adequate at Nogales with a slight shortage running for 4 weeks beginning in mid-April. There was generally a slight shortage for most of the quarter at the Texas border.

Fig 14: Refrigerated Truck Availability Monthly Ratings at Mexico Border Crossings



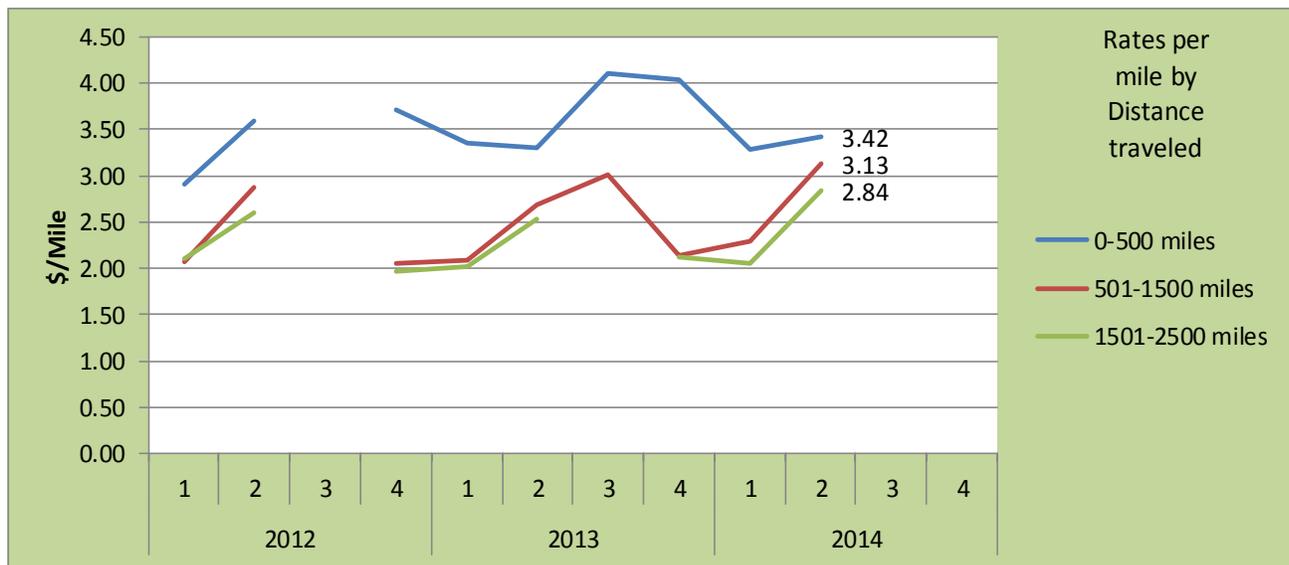
Florida

Table 14: Reported Top 5 Commodities Shipped from Florida (1,000 tons)

Commodity	2nd Quarter 2014	Share of Florida Total	Previous Quarter	Same Quarter Last Year	Current Quarter as % change from:	
					Previous Qtr	Same Qtr Last Year
Watermelons, seedless	321	26%	0	257	-	25%
Tomatoes	183	15%	168	174	9%	5%
Corn, Sweet	180	15%	67	157	168%	14%
Potatoes	110	9%	56	77	96%	42%
Watermelons, seeded	59	5%	-	56	-	5%
Top 5 Total	852	70%	291	721	193%	18%
Florida Total	1,219	100%	942	1,072	29%	14%

Source: Agricultural Marketing Service, Fruit and Vegetable Programs, Market News Division
 Note: "-" indicates no reported shipments during the quarter.

Figure 15: Florida Truck Rates (\$/Mile)



Source: Agricultural Marketing Service, Fruit and Vegetable Programs, Market News Division

Figure 16: Florida Truck Overview

Region/Reporting District	Diesel Fuel	Truck Rate	April	May	June
			Monthly Rating		
	\$/per gallon	\$/per mile	1=Surplus to 5=Shortage		
Regional Average	\$3.92	\$3.14	3.70	4.27	4.38
Central and South			4.60	4.75	
Central and North			3.00	4.33	4.00
South (melons)			4.20	4.00	4.00
West District (tomatoes)					4.50

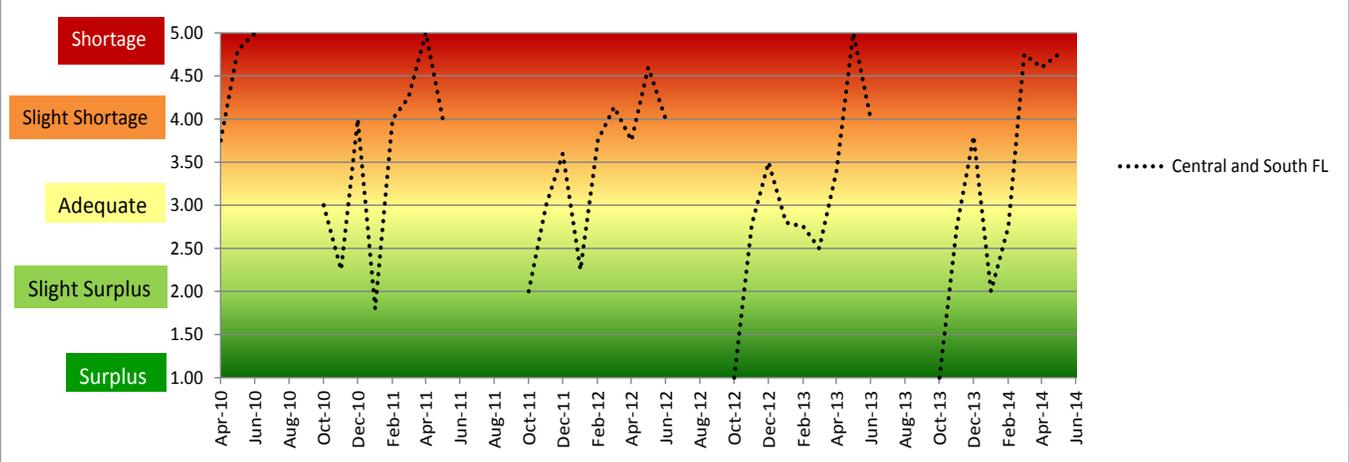
Diesel Fuel Source: Energy Information Administration/U.S. Department of Energy
 For the purpose of this report the Lower Atlantic District was used to represent the diesel fuel price.

Volume: Total reported shipments of fruits and vegetables from Florida during the 1st quarter of 2014 increased 14 percent from the same quarter in 2013. The sum of the top five commodities increased 18 percent, with shipments increasing in all five commodities from the same quarter last year. Florida production did not experience the same freezes as it did the previous year, boosting production above average, according to *The Packer*. This was especially apparent for watermelon production, with shipments of seedless watermelon 25 percent above last year.

Rates: The quarterly average truck rate for shipments between 501 and 1,500 miles was \$3.14 per mile, 37 percent higher than the previous quarter and 17 percent higher than same quarter last year.

Truck Overview: Diesel fuel prices averaged \$3.92 per gallon, 1 cent higher than last quarter and 3 percent higher than the same period last year. Truck availability was adequate Statewide for potatoes until mid-May, when a shortage occurred that lasted through the end of June. The Central and South Districts experienced truck shortage for melons, berries, mixed vegetables, and tomatoes from mid-April through the end of June, with slight shortages from June through the end of the quarter.

Fig 17: Refrigerated Truck Availability Monthly Ratings for Florida



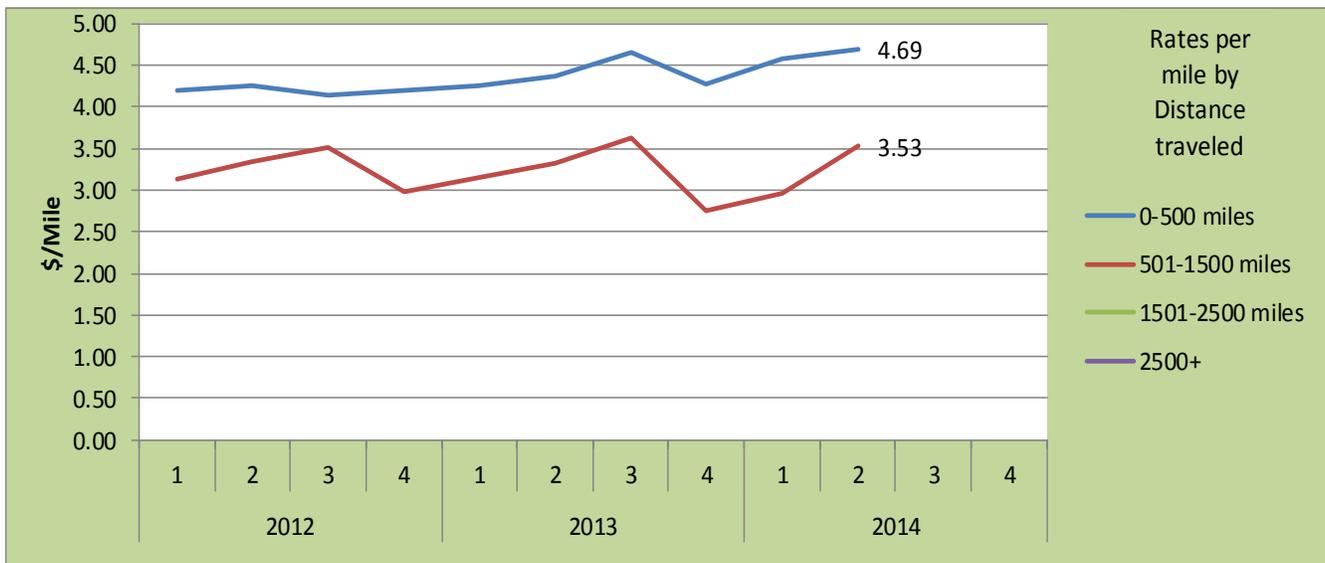
Southeast

Table 15: Reported Top 5 Commodities Shipped from the Southeast (1,000 tons)

Commodity	2nd Quarter 2014	Share of Mexico Total	Previous Quarter	Same Quarter Last Year	Current Quarter as % change from:	
					Previous Qtr	Same Qtr Last Year
Corn, sweet	109	17%	-	124	-	-12%
Watermelons, seedless	104	16%	-	94	-	10%
Onions, dry	66	10%	-	71	-	-7%
Sweet Potatoes	65	10%	69	63	-6%	3%
Blueberries	42	7%	-	32	-	32%
Top 5 Total	385	61%	69	384	458%	0%
Arizona Total	635	100%	96	634	561.0%	0%

Source: Agricultural Marketing Service, Fruit and Vegetable Programs, Market News Division
 Note: "-" indicates no reported shipments during the quarter.

Figure 18: Southeast Truck Rates (\$/Mile)



Source: Agricultural Marketing Service, Fruit and Vegetable Programs, Market News Division

Volume: In the second quarter of 2014, total shipments of fruits and vegetables from the Southeast were 634,000 tons, just 1,000 tons less than the same quarter in 2013. Among the top five commodities, results were split: sweet corn—the top commodity shipped—and dry onions decreased, while seedless watermelons, sweet potatoes, and blueberries increased. *The Packer* reports that early harvests of sweet corn in Georgia were adversely affected by too much late-spring rain and cold temperatures. Additionally, *The Packer* reports that some western buyers looked to eastern suppliers of melons this year to offset potential disruption from the drought in California and Arizona.

Rates: The quarterly average truck rate for shipments between 501 and 1,500 miles was \$3.53 per mile, 19 percent higher than the previous quarter and 6 percent higher than the same quarter last year.

Truck Overview: Diesel fuel prices averaged \$3.92 per gallon, about the same as last quarter and 2.8 percent higher than the same period last year. Truck availability for the South Georgia and Vidalia District of Georgia were adequate throughout the quarter. Eastern North Carolina was also adequate during the month of June, the only data available for that region. North Carolina, however, reported a shortage during June. South Carolina experienced a slight shortage throughout the quarter.

Figure 19: Southeast Truck Overview

Region/Reporting District	Diesel Fuel	Truck Rate 501 to 1500 miles	April	May	June
			Monthly Rating		
	\$/per gallon	\$/per mile	1=Surplus to 5=Shortage		
Regional Average	\$3.92	\$3.53	3.53	3.58	3.75
South Georgia			3.00	3.00	3.00
Vidalia District Georgia			3.00	3.00	3.00
North Carolina					5.00
Eastern North Carolina					3.00
South Carolina			4.60	4.75	4.75

n/a: availability data not reported

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

For the purpose of this report the Lower Atlantic District was used to represent the diesel fuel price for Southeast.

Terms and References

Data Sources: This information is compiled from the weekly *Fruit and Vegetable Truck Rate Report* by USDA, Agricultural Marketing Service (AMS), Fruit and Vegetable Programs, Market News Division. The website is: <http://marketnews.usda.gov/portal/fv>.

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 *Fruit and Vegetable 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:

Fruit and Vegetable Programs

<http://www.ams.usda.gov/fv>

Fruit and Vegetable Truck Report

<http://search.ams.usda.gov/mnsearch/MNSearchResults.aspx>

Economic Research Service Vegetable and Pulses

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

Economic Research Service Fruit and Tree Nuts

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

National Agricultural Statistics Service, Crops

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

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