



Agricultural Refrigerated Truck Quarterly

a quarterly publication of the Agricultural Marketing Service

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NATIONAL SUMMARY

Quarterly Overview

Fruit and Vegetable Shipments

USDA reported fourth quarter 2025 U.S. truck shipments of fresh produce were 7.71 million tons—down 10 percent from the previous quarter and down 7 percent from fourth quarter 2024.

Also, in fourth quarter 2025, shipments from Mexico were 2.68 million tons—more than from any other reported origin. Shipments from Mexico accounted for 36 percent of the total reported shipments of fresh fruit and vegetables. Shipments from the next five top regions by volume were as follows: Pacific Northwest (PNW), 1.75 million tons (23 percent of total); California, 1.11 million tons (14 percent of total); Canada, 607,000 tons (8 percent of total); Arizona, 394,000 tons (5 percent of total); and finally, Florida, 251,000 tons (3 percent of total).

These top five commodities accounted for 41 percent of reported truck movements in fourth quarter 2025:

- Potatoes (16 percent)
- Apples (9 percent)
- Dry onions (8 percent)
- Avocados (5 percent)
- Cucumbers (4 percent)

Diesel Fuel

During fourth quarter 2025, the U.S. diesel fuel price averaged \$3.71 per gallon—down 1 percent from the previous quarter and up 5 percent from the same quarter in 2024.

Truck Rates

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

Average U.S. Truck Rates for Select Routes (\$/Mile)

	0-500 miles	501-1,500 miles	1,501-2,500 miles	2,501+ miles
Q4 2024	4.88	2.56	2.39	1.35
Q1 2025	2.92	2.30	2.41	1.50
Q2 2025	1.90	2.60	2.26	1.36
Q3 2025	1.76	2.24	2.27	1.29
Q4 2025	2.62	2.23	2.25	1.39
Q4 Change from Previous Quarter	49%	> -1%	> -1%	8%
Q4 Change from Same Quarter Last Year	-46%	-13%	-6%	3%

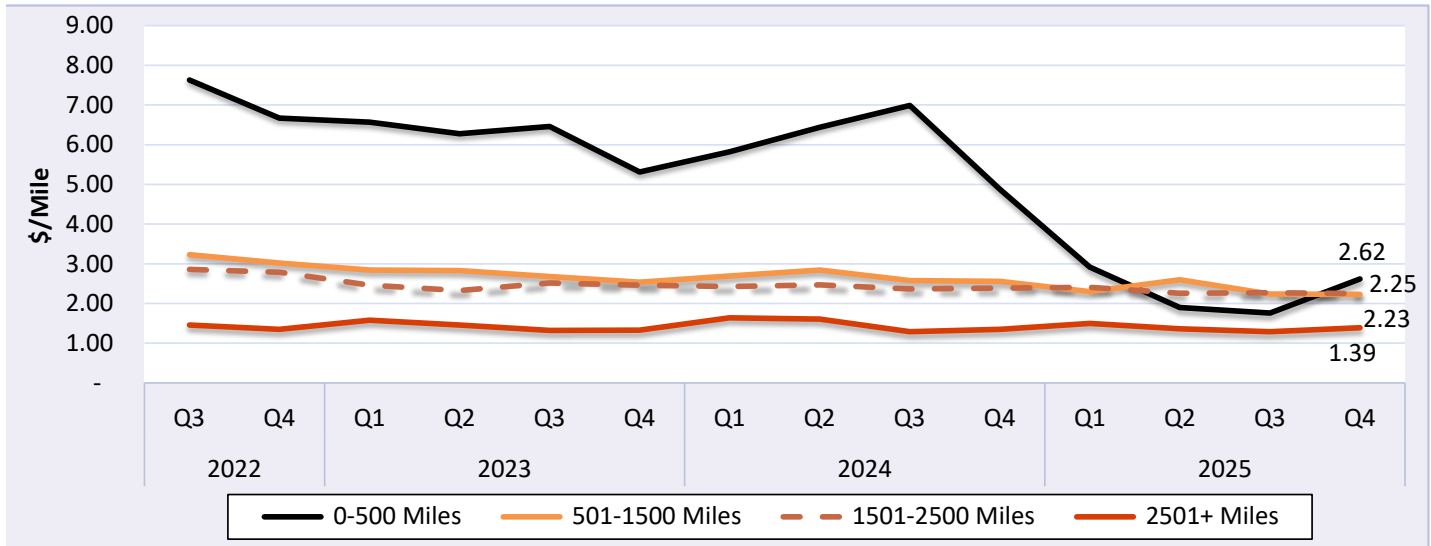
Note: The rates for 8 long-haul fruit and vegetable truck corridors are included in the national rate, weighted by commodity and origin volume. Table values may not conform exactly due to rounding.

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



U.S. Truck Rates

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



Note: The rates for 8 long-haul fruit and vegetable truck corridors are included in the national rates, weighted by commodity and origin volume. Starting in 2025 Q1, 0-500 mile rates from regions in California to Los Angeles have not been reported, which significantly lowered the national average.

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

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

Year	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
2025	2.30	2.60	2.24	2.23
2024	2.69	2.84	2.58	2.56
2023	2.84	2.83	2.68	2.54
2022	3.62	3.68	3.23	3.02
2021	2.92	3.56	3.22	3.48
2020	2.57	2.53	2.58	2.94
2019	2.60	2.62	2.48	2.55
2018	2.84	3.01	2.76	2.85
2017	1.85	2.43	2.47	2.57
2016	2.23	2.38	2.44	2.06
2015	2.47	2.66	2.54	2.37
2014	2.21	2.70	2.67	2.50
2013	2.25	2.63	2.65	2.29

Note: The rates for 8 long-haul fruit and vegetable truck corridors are included in the national rate, weighted by commodity and origin volume. Table values may not conform exactly due to rounding.

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



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

U.S. Origin	4th Quarter, 2025			3rd Quarter, 2025		
	October	November	December	July	August	September
California	3.12	3.28	3.25	2.64	2.69	2.89
Florida	1.85	2.00	2.15	3.21	n/a	n/a
Great Lakes	n/a	n/a	n/a	4.17	n/a	n/a
Mexico-Arizona	2.96	2.80	3.14	2.96	n/a	n/a
Mexico-Texas	2.17	2.86	3.42	2.50	2.34	2.13
New York	3.18	3.18	3.18	3.18	3.18	3.18
Other	3.00	3.00	3.00	3.00	3.00	3.00
PNW	1.69	2.28	2.21	2.40	1.65	1.61
Southeast	n/a	n/a	n/a	3.21	2.88	2.84

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

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

Truck Rates for Select Routes

Table 3: Origin-Destination Truck Rates for Select Routes, 4th Quarter 2025 (\$/Mile)

U.S. Origin	Atlanta	Baltimore	Boston	Chicago	Dallas	Los Angeles	Miami	New York	Philadelphia	Seattle
Arizona	n/a	3.03	n/a	n/a	n/a	n/a	n/a	n/a	2.98	n/a
California	2.80	2.83	n/a	2.54	3.21	n/a	3.21	2.74	2.80	n/a
Florida	1.98	2.08	2.17	1.40	n/a	n/a	n/a	2.34	2.12	n/a
Mexico-Arizona	2.85	2.89	2.94	2.59	3.18	2.76	n/a	2.92	2.93	n/a
Mexico-Texas	3.16	2.86	3.09	2.48	3.93	2.29	2.91	3.39	2.89	n/a
Mid-Atlantic	3.41	9.88	4.61	1.64	n/a	n/a	n/a	6.41	8.21	n/a
New York	3.50	n/a	15.59	n/a	n/a	n/a	2.86	15.67	9.35	n/a
Other	2.95	3.20	2.90	n/a	3.05	n/a	n/a	n/a	n/a	n/a
PNW	2.70	2.83	2.72	2.44	2.63	2.06	2.67	2.86	2.76	7.83

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

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



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Quarter 4, 2025

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

U.S. Origin	Atlanta	Baltimore	Boston	Chicago	Dallas	Los Angeles	Miami	New York	Philadelphia	Seattle
Arizona	n/a	7,883	n/a	n/a	n/a	n/a	n/a	n/a	7,892	n/a
California	5,879	7,674	8,529	5,272	4,179	n/a	8,350	7,986	7,804	3,254
Florida	943	1,955	2,898	1,678	n/a	n/a	n/a	2,628	2,208	n/a
Mexico-Arizona	5,139	6,794	7,928	4,661	3,117	1,544	n/a	7,311	7,028	n/a
Mexico-Texas	3,638	5,121	6,788	3,546	1,963	3,663	4,454	6,788	5,483	n/a
Mid-Atlantic	2,388	988	2,075	1,313	n/a	n/a	n/a	1,475	1,150	n/a
New York	3,500	n/a	2,650	n/a	n/a	n/a	4,150	2,350	2,150	n/a
Other	4,250	5,725	6,225	n/a	2,225	n/a	n/a	n/a	n/a	n/a
PNW	6,892	7,513	8,013	4,875	5,383	2,575	8,608	7,863	7,446	1,096

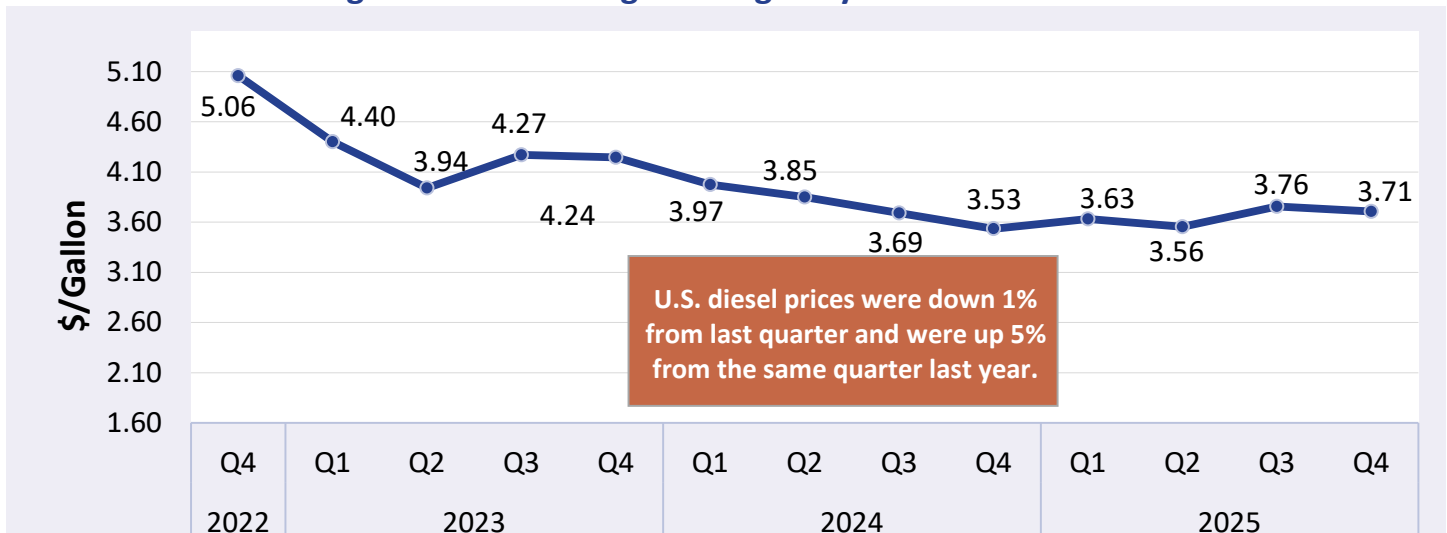
Note: "n/a" indicates rates not available.

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

U.S. Diesel Fuel Prices

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

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



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



AGRICULTURAL REFRIGERATED TRUCK QUARTERLY

Quarter 4, 2025

Table 5: Average Diesel Fuel Prices (All Types)

Region	4th Quarter 2025 Price \$/Gallon	Change From Last Quarter	Change From Last Year
East Coast	3.75	-1%	5%
California	4.90	-1%	5%
New England	4.00	1%	6%
Central Atlantic	3.93	0%	4%
Lower Atlantic	3.66	-1%	5%
Gulf Coast	3.35	-1%	5%
Midwest	3.69	-1%	5%
Rocky Mountain	3.61	-4%	3%
West Coast Except California	4.02	-3%	7%
U.S.	3.71	-1%	5%

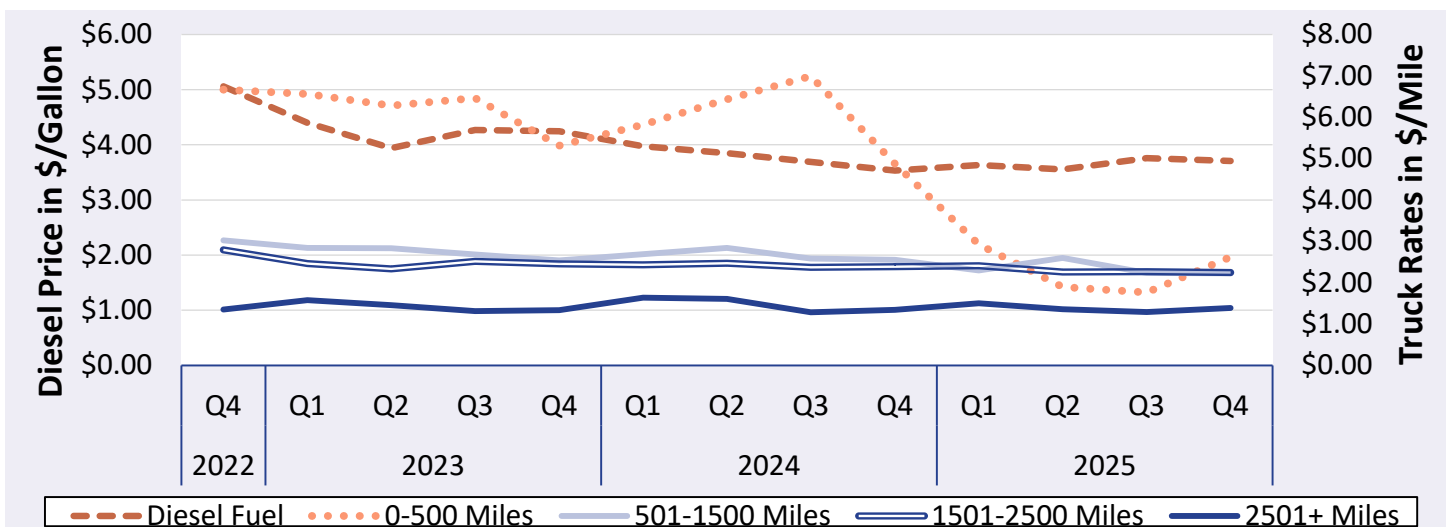
Note: Table values may not conform exactly due to rounding.

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

Relationship Between Diesel Fuel and Truck Rates

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

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



Note: The rates for 8 long-haul fruit and vegetable truck corridors are included in the national rates, weighted by origin volume. See note in Figure 1 on the recent decline in 0-500 mile rates.

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



AGRICULTURAL REFRIGERATED TRUCK QUARTERLY

Quarter 4, 2025

Table 6: Average Diesel Fuel Prices and Truck Rates

Year	Quarter	Diesel Fuel (\$/gallon)	Truck Rates (\$/mile) 501-1500 miles	% Change From			
				Last Quarter		Last Year	
				Diesel	Truck	Diesel	Truck
2025	Q4	3.71	2.23	-1%	-1%	5%	-13%
	Q3	3.76	2.24	6%	-14%	2%	-13%
	Q2	3.56	2.60	-2%	13%	-8%	-8%
	Q1	3.63	2.30	3%	-10%	-9%	-15%
2024	Q4	3.53	2.56	-4%	-1%	-17%	1%
	Q3	3.69	2.58	-4%	-9%	-14%	-4%
	Q2	3.85	2.84	-3%	5%	-2%	< 1%
	Q1	3.97	2.69	-6%	6%	-10%	-5%
2023	Q4	4.24	2.54	-1%	-5%	-16%	-16%
	Q3	4.27	2.68	8%	-5%	-17%	-17%
	Q2	3.94	2.83	-10%	> -1%	-28%	-23%
	Q1	4.40	2.84	-13%	-6%	3%	-22%
2022	Q4	5.06	3.02	-2%	-7%	38%	-13%

Note: Table values may not conform exactly due to rounding.

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



AGRICULTURAL REFRIGERATED TRUCK QUARTERLY

Quarter 4, 2025

Quarterly Truck Availability

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

Truck availability legend													
1=Surplus	2=Slight surplus	3=Adequate	4=Slight shortage	5=Shortage									
California, Central, And Western Arizona	Commodities	10/7	10/14	10/21	10/28	11/4	11/11	11/18	11/25	12/2	12/9	12/16	12/30
Central Coast California	Anise, Bok Choy, Cabbage, Chinese Cabbage, Cilantro, Endive, Escarole, Kale Greens, Leeks, Parsley, Spinach, Broccoli, Cauliflower, Boston Lettuce, Green Leaf Lettuce, Iceberg Lettuce, Red Leaf Lettuce, Romaine Lettuce, Green Onions	3	3	3	3	3	3	3	3	3	3		
Imperial, Coachella Valleys Ca, Central and Western Az, Mexico Crossings Through Calexico and San Luis	Anise, Broccoli, Cabbage, Cauliflower, Cilantro, Kale Greens, Leeks, Green Leaf Lettuce, Iceberg Lettuce, Red Leaf Lettuce, Romaine Lettuce, Parsley, Radishes, Spinach, Bok Choy, Chinese Cabbage, Endive, Escarole							3	3	4	3	3	4
Kern District California	Carrots, Grapes, Broccoli, Cabbage, Cauliflower, Boston Lettuce, Green Leaf Lettuce, Iceberg Lettuce, Red Leaf Lettuce, Romaine Lettuce, Green Onions	3	3	3	3	3	3	3	3	3	3	3	4
Oxnard District California	Celery, Cilantro, Strawberries, Brussels Sprouts, Cabbage, Kale Greens, Parsley, Radishes, Spinach	3	3	3	3	3	3	3	3	3	3	3	4
Salinas-Watsonville California	Cauliflower, Broccoli, Cabbage, Boston Lettuce, Green Leaf Lettuce, Iceberg Lettuce, Red Leaf Lettuce, Romaine Lettuce, Green Onions	3	3	3	3	3	3	3	3	3	3		
Santa Maria California	Broccoli, Cauliflower, Celery, Cilantro, Strawberries	3	3	3	3	3	3	3	3	3	3	3	4
South and Central District California	Grapefruit, Lemons, Oranges, Anise, Blackberries, Bok Choy, Broccoli, Cabbage, Cauliflower, Celery, Cilantro, Endive, Escarole, Kale Greens, Green Leaf Lettuce, Iceberg Lettuce, Red Leaf Lettuce, Romaine Lettuce, Parsley, Raspberries, Spinach, Leeks, Chinese Cabbage	3	3	3	3	3	3	3	3	3	3	3	4

Note: Empty cells were not reported. District and availabilities data come from the weekly Specialty Crops Truck Rate reports:

https://mymarketnews.ams.usda.gov/filerepo/reports?field_slug_id_value=2375.

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



AGRICULTURAL REFRIGERATED TRUCK QUARTERLY

Quarter 4, 2025

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									
Florida	Commodities	10/7	10/14	10/21	10/28	11/4	11/11	11/18	11/25	12/2	12/9	12/16	12/30
Central and South Florida	Round Green Beans, Broccoli, Cabbage, Celery, Sweet Corn, Endive, Escarole, Other Lettuce, Romaine Lettuce, Okra, Bell Peppers, Other Peppers, Radishes, Yellow Squash Crookneck/ Straightneck, Zucchini Squash, Strawberries, Tomatoes, Cherry Tomatoes, Grape Tomatoes, Plum Tomatoes							3	3	3	3	3	
North, Central and South Florida	Tomatoes, Cherry Tomatoes, Grape Tomatoes, Plum Tomatoes			3	3	3	3	3					
U.S.-Mexico border	Commodities	10/7	10/14	10/21	10/28	11/4	11/11	11/18	11/25	12/2	12/9	12/16	12/30
Imperial, Coachella Valleys Ca, Central and Western Az, Mexico Crossings Through Calexico and San Luis	Anise, Broccoli, Cabbage, Cauliflower, Cilantro, Kale Greens, Leeks, Green Leaf Lettuce, Iceberg Lettuce, Red Leaf Lettuce, Romaine Lettuce, Parsley, Radishes, Spinach, Bok Choy, Chinese Cabbage, Endive, Escarole							3	3	4	3	3	4
Nogales, Arizona	Round Green Beans, Cucumbers, Eggplant, Honeydews, Bell Peppers, Acorn Squash, Butternut Squash, Grey Squash, Kabocha Squash, Spaghetti Squash, Yellow Squash Straightneck, Zucchini Squash, Tomatoes, Grape Tomatoes, Plum Tomatoes, Watermelons, Cantaloupe				3	3	3	4	4	4	3	4	5
South Texas	Asparagus, Broccoli, Carrots, Chayote, Cilantro, Cucumbers, Grapefruit, Limes, Oranges, Papaya, Anaheim Peppers, Bell Peppers, Habanero Peppers, Jalapeno Peppers, Poblano Peppers, Serrano Peppers, Pineapples, Tomatillos, Tomatoes, Grape Tomatoes, Plum Tomatoes, Watermelons	1	1	3	3	3	3	3	3	4	4	5	5
Pacific Northwest (ID, OR, & WA)	Commodities	10/7	10/14	10/21	10/28	11/4	11/11	11/18	11/25	12/2	12/9	12/16	12/30
Yakima Valley and Wenatchee District, Washington	Apples, Pears	3	3	3	4	4	3	4	4	3	3	3	3

Note: Empty cells were not reported. District and availabilities data come from the weekly Specialty Crops Truck Rate reports:

https://mymarketnews.ams.usda.gov/filerepo/reports?field_slug_id_value=2375.

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

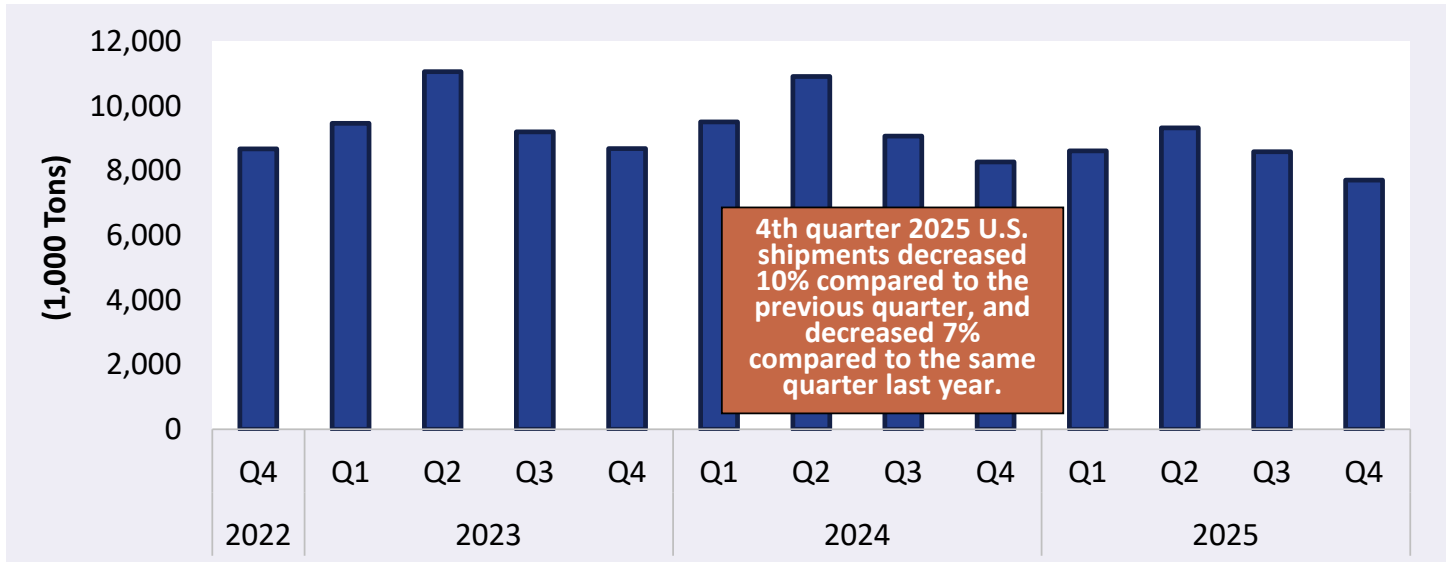


AGRICULTURAL REFRIGERATED TRUCK QUARTERLY

Quarter 4, 2025

Reported U.S. Shipments

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



Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data. Starting in Q1 2025, California citrus volumes have not been reported.

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

Year	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter	Annual
2025	8,618	9,328	8,594	7,708	34,248
2024	9,517	10,921	9,071	8,278	37,788
2023	9,473	11,067	9,204	8,684	38,429
2022	8,751	10,404	8,891	8,678	36,724
2021	9,742	11,265	9,334	8,749	39,091
2020	9,749	10,502	8,872	8,677	37,799
2019	9,027	9,983	8,483	8,329	35,822
2018	9,019	10,463	8,581	8,139	36,202
2017	7,706	9,369	8,279	7,873	33,228
2016	7,745	9,562	8,329	7,777	33,413
2015	7,664	9,267	7,994	7,392	32,317
2014	7,300	8,859	7,827	7,249	31,236
2013	6,948	8,821	7,718	7,051	30,537
2012	7,071	8,792	7,703	7,230	30,797
2011	6,474	8,809	7,582	7,076	29,942
2010	6,532	8,739	7,845	7,070	30,187
2009	6,646	8,530	7,653	6,902	29,732

Note: Table values may not conform exactly due to rounding. Starting in Q1 2025, California citrus volumes have not been reported.

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



AGRICULTURAL REFRIGERATED TRUCK QUARTERLY

Quarter 4, 2025

Reported Shipments by Select Commodities

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

Commodity	4th Quarter 2025	Previous Quarter	Same Quarter Last Year	Current Quarter as % change from:	
				Previous Qtr	Same Qtr Last Year
Potatoes	1,197	973	1,186	23%	1%
Apples	716	565	680	27%	5%
Onions, Dry	585	560	591	5%	-1%
Avocados	369	311	334	19%	11%
Cucumbers	316	337	340	-6%	-7%
Grapes	297	384	298	-23%	> -1%
Tomatoes	280	324	311	-14%	-10%
Tomatoes, Plum Type	279	294	309	-5%	-10%
Peppers, Bell Type	255	226	243	13%	5%
Lettuce, Romaine	238	212	244	12%	-2%

Note: Table values may not conform exactly due to rounding. Starting in Q1 2025, California citrus volumes have not been reported.

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

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

Origin	4th Quarter 2025 Volume	% Change from Last Quarter	% Change From Same Quarter Last Year
Mexico	2,679	15%	-2%
PNW	1,750	24%	5%
California	1,112	-59%	-39%
Canada	607	-3%	7%
Arizona	394	125%	22%
Florida	251	-	41%
Great Lakes	235	-4%	1%
Colorado	205	59%	-15%
Southeast	131	-48%	3%
New York	94	42%	-14%

Note: The Regional Markets section of this report excludes Canada, because it lacks rate and availability data. Table values may not conform exactly due to rounding. Any "-" in the table indicates no reported shipments during the quarter or a percentage change with an at- or near-zero denominator. Starting in Q1 2025, California citrus volumes have not been reported.

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



REGIONAL MARKETS

U.S. Mexico Border

Volume

Total reported shipments of fruit and vegetables from Mexico in fourth quarter 2025 were 2.68 million tons, down 2 percent year to year. The summed volume of the top five commodities shipped from the U.S. Mexico border also decreased 4 percent year to year. Three of the top five commodities showed year-to-year decreases: shipments of watermelons were down 5 percent; cucumbers, down 10 percent; and plum tomatoes, down 19 percent. Shipments of limes and avocados were up 5 percent and 9 percent, respectively.

Rates

In fourth quarter 2025, truck rates for shipments between 501 miles and 1,500 miles from Arizona-Mexico border crossings averaged \$2.84 per mile—up 7 percent from third quarter 2025 (quarter to quarter) and down 1 percent year to year. Rates for shipments between 501 miles and 1,500 miles from Texas-Mexico border crossings averaged \$2.81 per mile—up 15 percent quarter to quarter and up 9 percent year to year.

Truck Overview

Diesel fuel prices for border crossings from Arizona averaged \$4.02 per gallon—down 3 percent quarter to quarter and up 7 percent year to year. Diesel fuel prices for border crossings from Texas averaged \$3.35—down 1 percent quarter to quarter and up 5 percent year to year. Mexico crossings through Calexico and San Luis did not report truck availability in October and reported adequate availability in November and December. Mexico crossings through Nogales, AZ, reported adequate truck availability in October and November and a slight shortage in December. Mexico crossings through South Texas reported a slight surplus in October, adequate availability in November, and a slight shortage in December.

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

Commodity	4th Quarter 2025	Share of Mexico Total	Previous Quarter	Same Quarter Last Year	Current Quarter as % change from:	
					Previous Qtr	Same Qtr Last Year
Avocados	357	13%	258	328	38%	9%
Cucumbers	223	8%	183	249	22%	-10%
Tomatoes, Plum Type	219	8%	221	270	-1%	-19%
Limes	201	8%	230	191	-13%	5%
Watermelons	163	6%	53	172	210%	-5%
Top 5 Total	1,163	43%	945	1,210	23%	-4%
Mexico Total	2,679	100%	2,325	2,729	15%	-2%

Note: Any "-" in the table indicates no reported shipments during the quarter or a percentage change with an at- or near-zero denominator. Table values may not conform exactly due to rounding.

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



AGRICULTURAL REFRIGERATED TRUCK QUARTERLY

Quarter 4, 2025

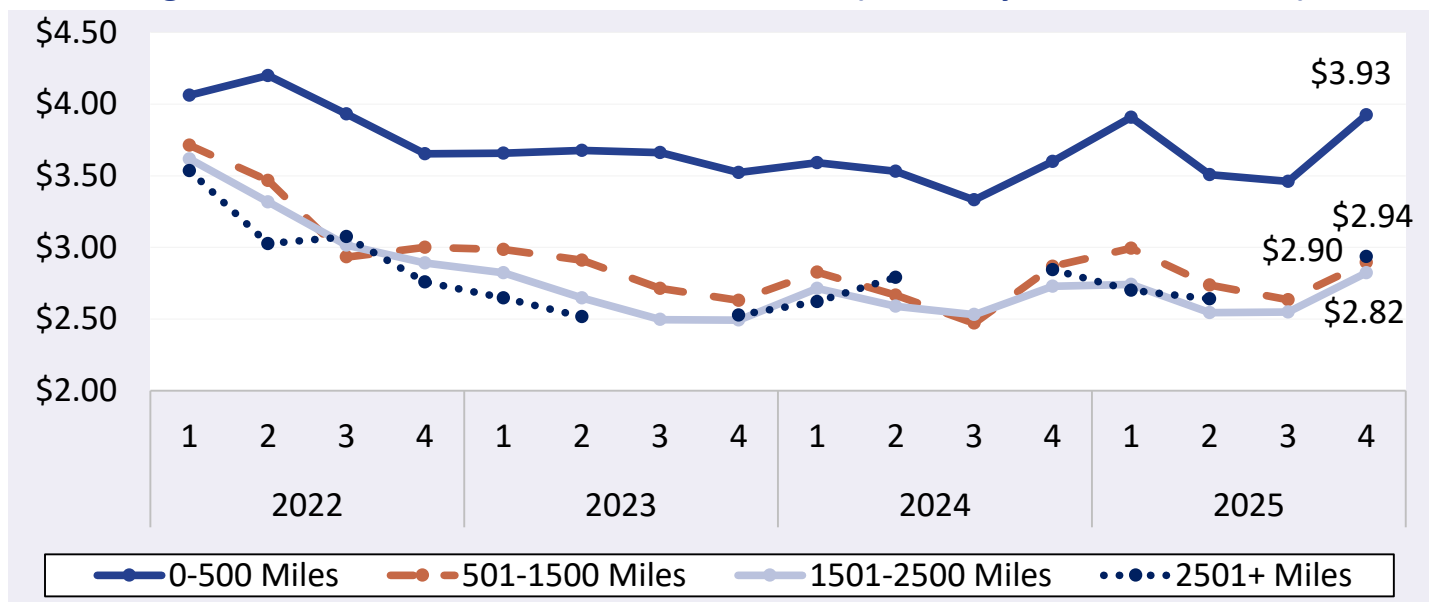
Table 12: Top 5 Commodities Shipped to U.S. from Mexico by State of Entry (1,000 tons)

Texas		California		Arizona		New Mexico	
Commodity	4th Quarter 2025	Commodity	4th Quarter 2025	Commodity	4th Quarter 2025	Commodity	4th Quarter 2025
Avocados	352	Tomatoes, Plum Type	63	Cucumbers	128	Peppers, Other	38
Limes	181	Onions, Green	41	Watermelons	103	Peppers, Anaheim	24
Tomatoes, Plum Type	137	Cucumbers	30	Peppers, Bell Type	45	Peppers, Jalapeno	10
Tomatoes	94	Asparagus	23	Tomatoes	27	Watermelons	< 1
Peppers, Bell Type	83	Tomatillos	21	Honeydews	25	Peppers, Poblano	< 1
Mexico through TX Total	1,658	Mexico through CA Total	413	Mexico through AZ Total	534	Mexico through NM Total	74

Note: Table values may not conform exactly due to rounding. Any "-" in the table indicates no reported shipments during the quarter.

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

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



Note: Any gaps in the chart lines are the result of quarters with no reported data for the region.

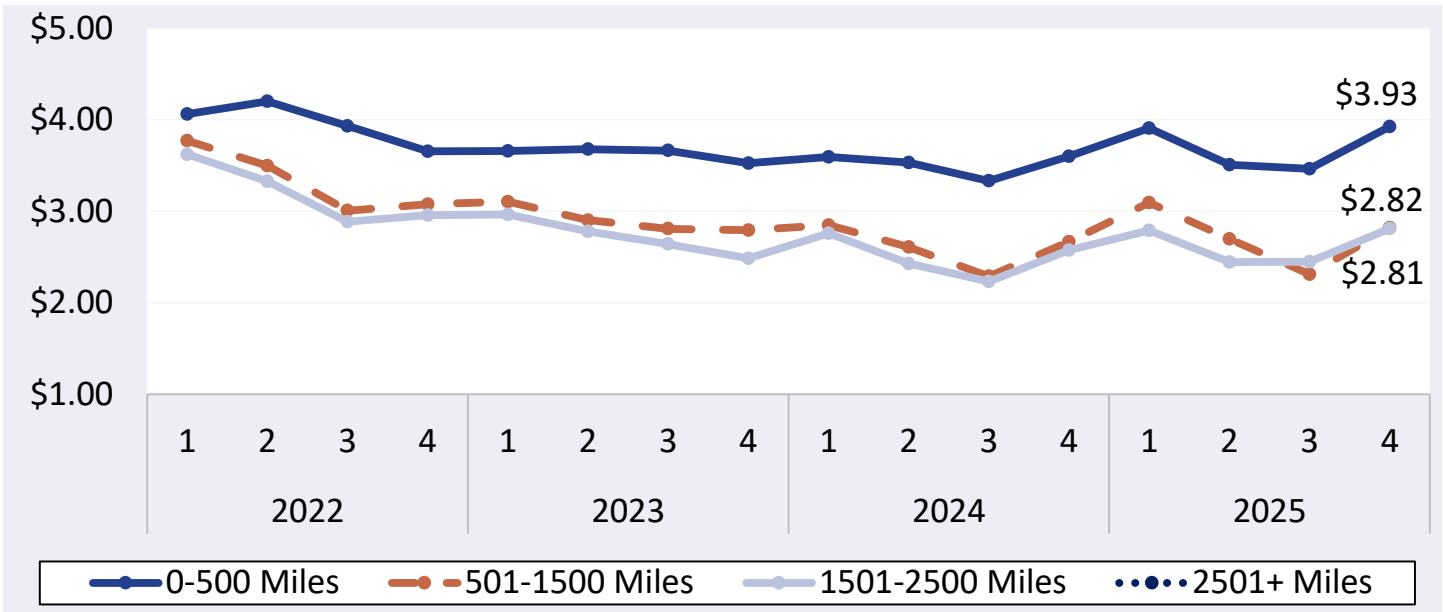
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.



AGRICULTURAL REFRIGERATED TRUCK QUARTERLY

Quarter 4, 2025

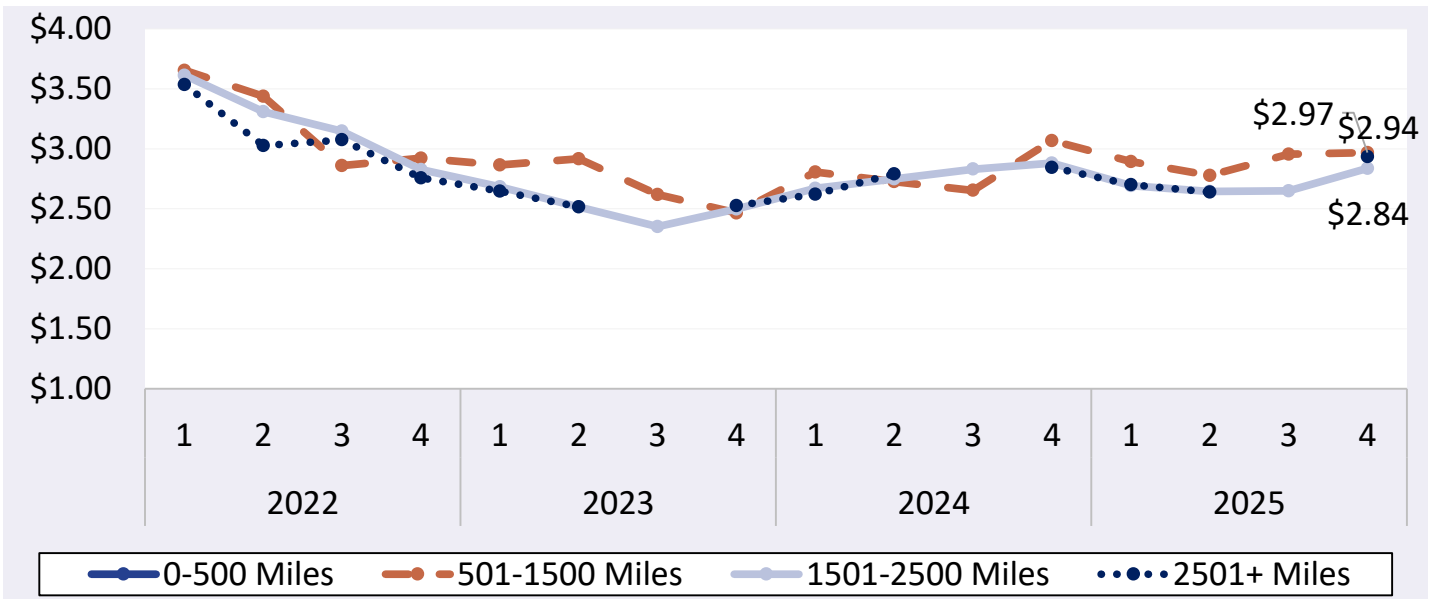
Figure 6: Texas Truck Rates from U.S.-Mexico Border (\$/Mile by Distance Traveled)



Note: Any gaps in the chart lines are the result of quarters with no reported data for the region.

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

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



Note: Any gaps in the chart lines are the result of quarters with no reported data for the region.

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



AGRICULTURAL REFRIGERATED TRUCK QUARTERLY

Quarter 4, 2025

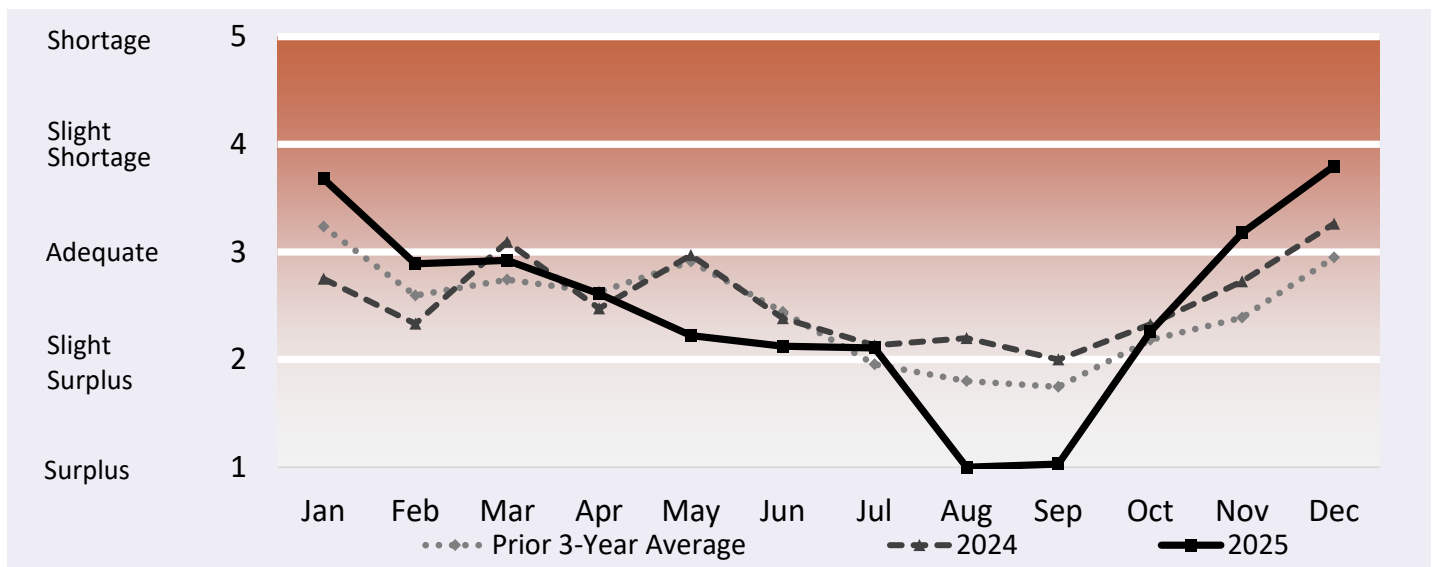
Table 13: Truck Overview from the U.S.-Mexico Border
(Availability Rating: 1=Surplus to 5=Shortage)

Region/Reporting District	October	November	December	4th Quarter
Imperial, Coachella Valleys Ca, Central and Western Az, Mexico Crossings Through Calexico and San Luis	-	3	3.5	3.25
Mexico Crossings Through Nogales, Arizona	3	3.44	3.91	3.45
Mexico Crossings Through South Texas	2.07	3	4.33	3.13
Regional Average Availability	2.54	3.15	3.91	3.20
Diesel Fuel Price (\$/gallon), through Texas	3.32	3.44	3.28	3.35
Diesel Fuel Price (\$/gallon), through Arizona	4.06	4.14	3.87	4.02

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

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

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



Note: Any gaps in the chart lines are the result of quarters with no reported data for the region.

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



AGRICULTURAL REFRIGERATED TRUCK QUARTERLY

Quarter 4, 2025

PNW

Volume

In fourth quarter 2025, total reported shipments of fruit and vegetables from the Pacific Northwest (PNW) were 1.75 million tons, up 5 percent year to year. The summed volume of the top five commodities shipped from the PNW also increased 6 percent year to year. Three of the top five commodities saw year-to-year volume increases, including potatoes (up 6 percent); apples (up 7 percent); and pears (up 23 percent). Shipments of dry onions decreased 1 percent. Last year, plums did not have any shipments in the fourth quarter.

Rates

The quarterly average truck rate for shipments between 501 miles and 1,500 miles was \$2.53 per mile—down 3 percent quarter to quarter and down 3 percent year to year.

Truck Overview

Diesel fuel prices averaged \$4.02 per gallon—down 3 percent quarter to quarter and up 7 percent year to year. The Yakima Valley and Wenatchee district reported adequate availability in October and December and a slight shortage in November.

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

Commodity	4th Quarter 2025	Share of PNW Total	Previous Quarter	Same Quarter Last Year	Current Quarter as % change from:	
					Previous Qtr	Same Qtr Last Year
Potatoes	567	32%	499	534	14%	6%
Apples	565	32%	491	529	15%	7%
Onions, Dry	471	27%	246	476	91%	-1%
Pears	147	8%	40	119	266%	23%
Plums	< 1	< 1%	1	-	-	-
Top 5 Total	1,750	100%	1,277	1,658	37%	6%
PNW Total	1,750	100%	1,415	1,659	24%	5%

Note: Any "-" in the table indicates no reported shipments during the quarter or a percentage change with an at- or near-zero denominator. Table values may not conform exactly due to rounding.

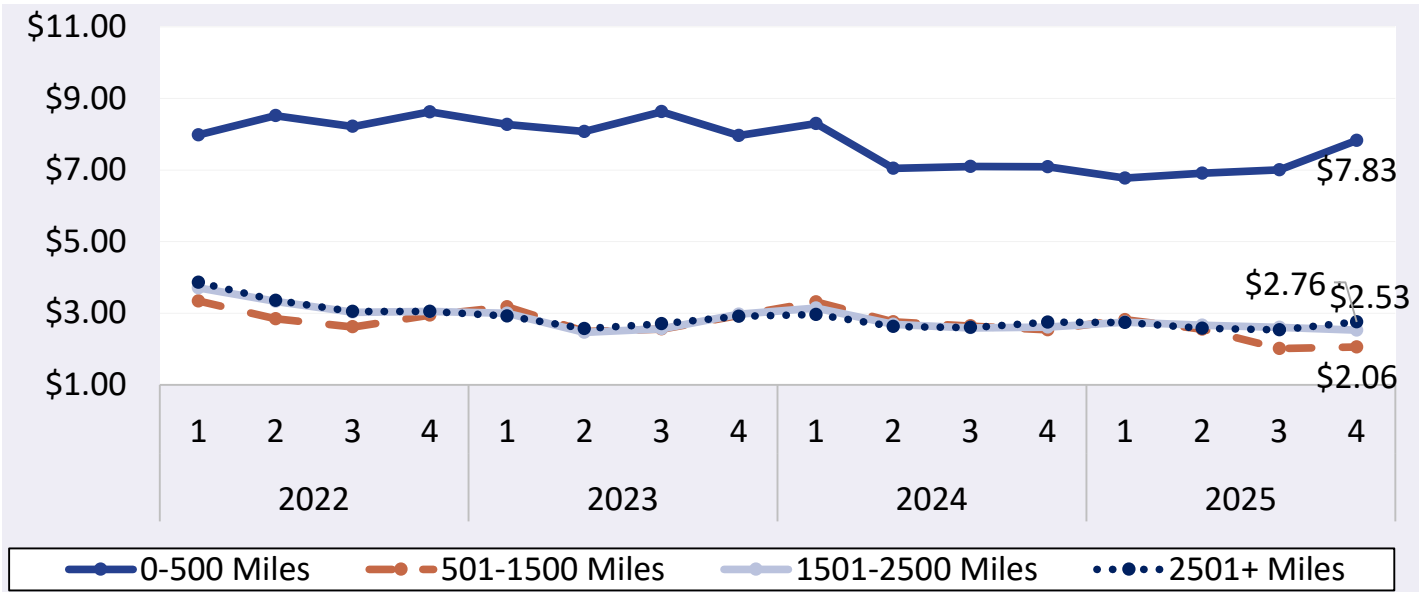
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.



AGRICULTURAL REFRIGERATED TRUCK QUARTERLY

Quarter 4, 2025

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



Note: Any gaps in the chart lines are the result of quarters with no reported data for the region.

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

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

Region/Reporting District	October	November	December	4th Quarter
Yakima Valley and Wenatchee District, Washington	3.25	3.75	3	3.33
Regional Average Availability	3.25	3.75	3	3.33
Diesel Fuel Price (\$/gallon)	4.06	4.14	3.87	4.02

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

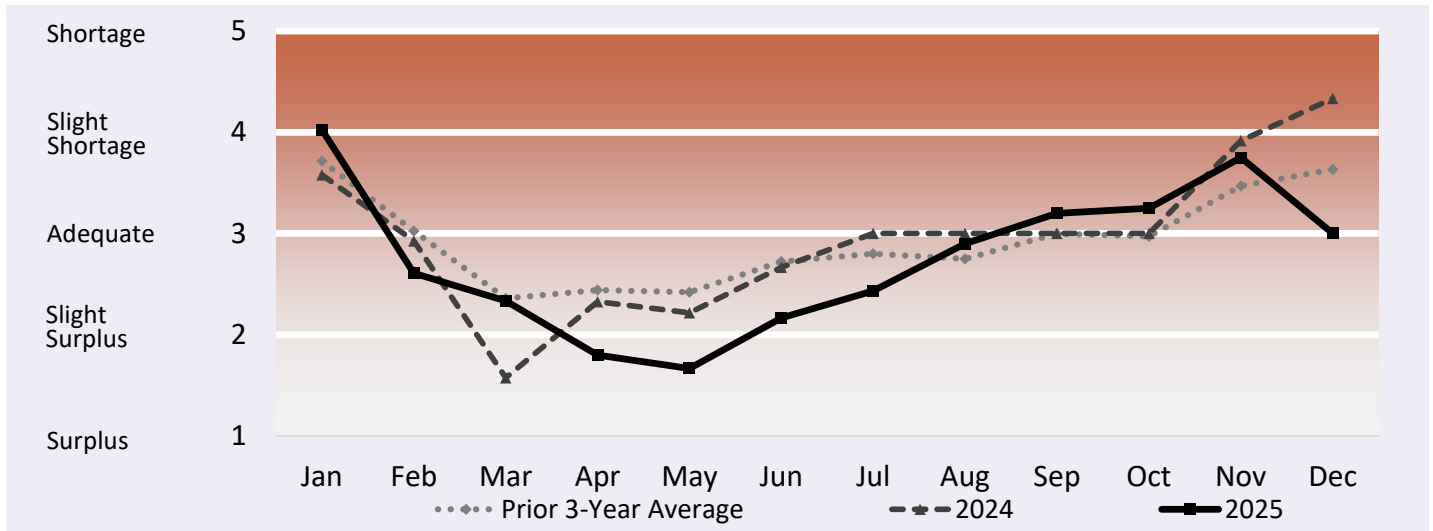
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.



AGRICULTURAL REFRIGERATED TRUCK QUARTERLY

Quarter 4, 2025

Figure 10: Refrigerated Truck Availability Monthly Ratings for PNW



Note: Any gaps in the chart lines are the result of quarters with no reported data for the region.

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



AGRICULTURAL REFRIGERATED TRUCK QUARTERLY

Quarter 4, 2025

California

Volume

Total reported shipments of fruit and vegetables from California in fourth quarter 2025 were 1.11 million tons, down 39 percent year to year. The summed volume of the top five commodities shipped from California also decreased 16 percent year to year. All the top five commodities showed year-to-year decreases: shipments of grapes were down 1 percent; celery, down 15 percent; iceberg lettuce, down 24 percent; romaine lettuce, down 26 percent; and strawberries, down 30 percent.

Rates

The quarterly average truck rate for shipments between 501 miles and 1,500 miles was \$2.64 per mile—up 9 percent quarter to quarter and unchanged year to year.

Truck Overview

Diesel fuel prices averaged \$4.90 per gallon—down 1 percent quarter to quarter and up 5 percent year to year. All districts reported adequate truck availability throughout the quarter.

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

Commodity	4th Quarter 2025	Share of California Total	Previous Quarter	Same Quarter Last Year	Current Quarter as % change from:	
					Previous Qtr	Same Qtr Last Year
Grapes	296	27%	363	298	-18%	-1%
Celery	153	14%	128	181	19%	-15%
Strawberries	111	10%	367	158	-70%	-30%
Lettuce, Iceberg	95	9%	230	125	-59%	-24%
Lettuce, Romaine	90	8%	197	121	-54%	-26%
Top 5 Total	745	67%	1,285	882	-42%	-16%
California Total	1,112	100%	2,734	1,830	-59%	-39%

Note: Any "-" in the table indicates no reported shipments during the quarter or a percentage change with an at- or near-zero denominator. Table values may not conform exactly due to rounding.

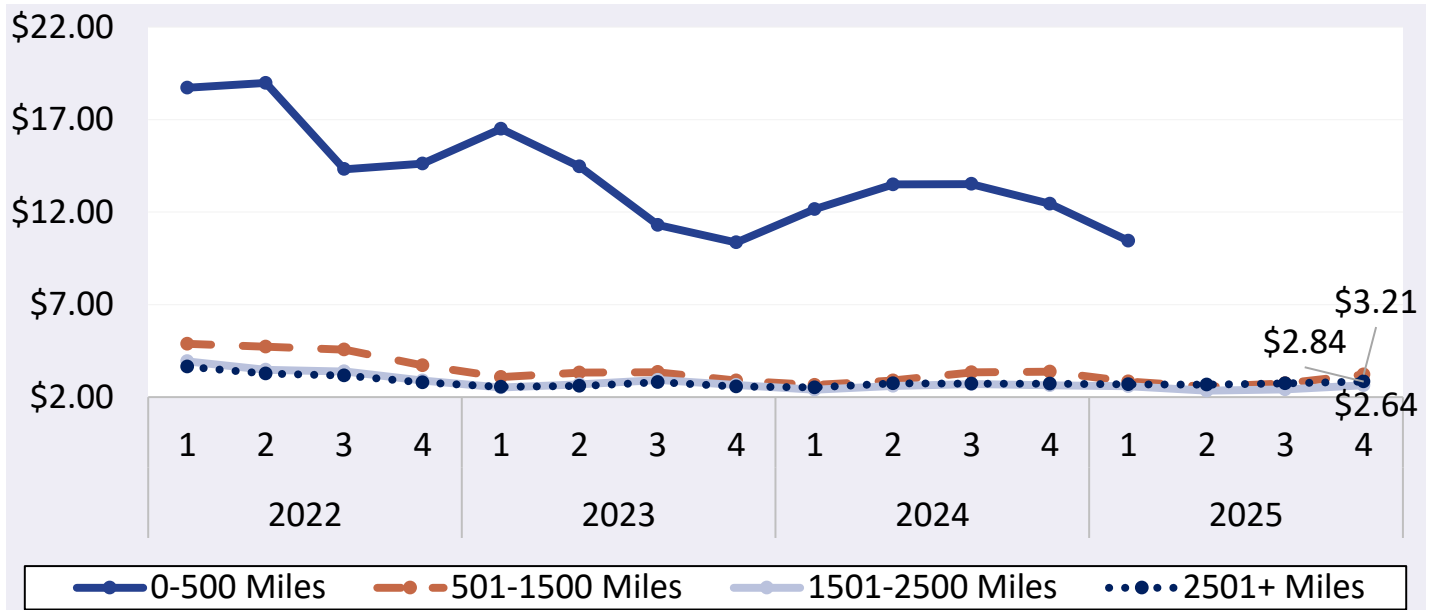
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.



AGRICULTURAL REFRIGERATED TRUCK QUARTERLY

Quarter 4, 2025

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



Note: Any gaps in the chart lines are the result of quarters with no reported data for the region. Starting in 2025 Q1, 0-500 mile rates from regions in California to Los Angeles have not been reported.

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

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

Region/Reporting District	October	November	December	4th Quarter
Central Coast California	3	3	3	3
Kern District California	3	3	3.25	3.08
Oxnard District California	3	3	3.25	3.08
Salinas-Watsonville California	3	3	3	3
Santa Maria California	3	3	3.25	3.08
South and Central District California	3	3	3.06	3.02
Regional Average Availability	3	3	3.13	3.04
Diesel Fuel Price (\$/gallon)	4.94	4.98	4.79	4.90

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

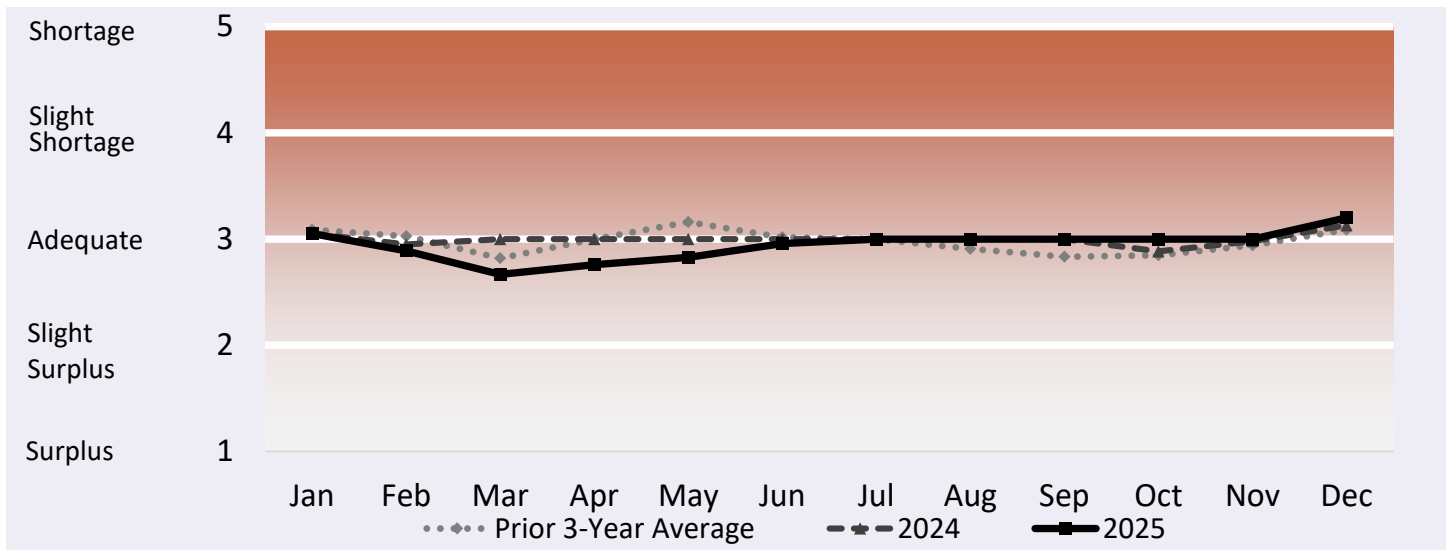
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.



AGRICULTURAL REFRIGERATED TRUCK QUARTERLY

Quarter 4, 2025

Figure 12: Refrigerated Truck Availability Monthly Ratings for California



Note: Any gaps in the chart lines are the result of quarters with no reported data for the region.

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



AGRICULTURAL REFRIGERATED TRUCK QUARTERLY

Quarter 4, 2025

Arizona

Volume

During fourth quarter 2025, total reported shipments of fruit and vegetables from Arizona were 394,000 tons—up 22 percent year to year. The summed volume of the top five commodities shipped from Arizona also increased 23 percent year to year. Three of the top five commodities saw year-to-year volume increases in the fourth quarter: iceberg lettuce (up 1 percent); romaine lettuce (up 22 percent); and cauliflower (up 45 percent). Shipments of cantaloupes decreased 31 percent. Last year, processed lettuce did not have any shipments in the fourth quarter.

Rates

The quarterly average truck rate for shipments between 501 miles and 1,500 miles was \$3.01 per mile—up 8 percent year to year.

Truck Overview

Diesel fuel prices averaged \$4.02 per gallon—down 3 percent quarter to quarter and up 7 percent year to year. The Mexico crossings through Calexico and San Luis did not report in October and reported adequate availability in November and December.

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

Commodity	4th Quarter 2025	Share of Arizona Total	Previous Quarter	Same Quarter Last Year	Current Quarter as % change from:	
					Previous Qtr	Same Qtr Last Year
Lettuce, Romaine	123	31%	-	101	-	22%
Lettuce, Iceberg	109	28%	-	108	-	1%
Lettuce, Processed	44	11%	-	-	-	-
Cantaloupes	28	7%	55	41	-48%	-31%
Cauliflower	14	3%	-	9	-	45%
Top 5 Total	318	81%	55	259	479%	23%
Arizona Total	394	100%	175	322	125%	22%

Note: Any "-" in the table indicates no reported shipments during the quarter or a percentage change with an at- or near-zero denominator. Table values may not conform exactly due to rounding.

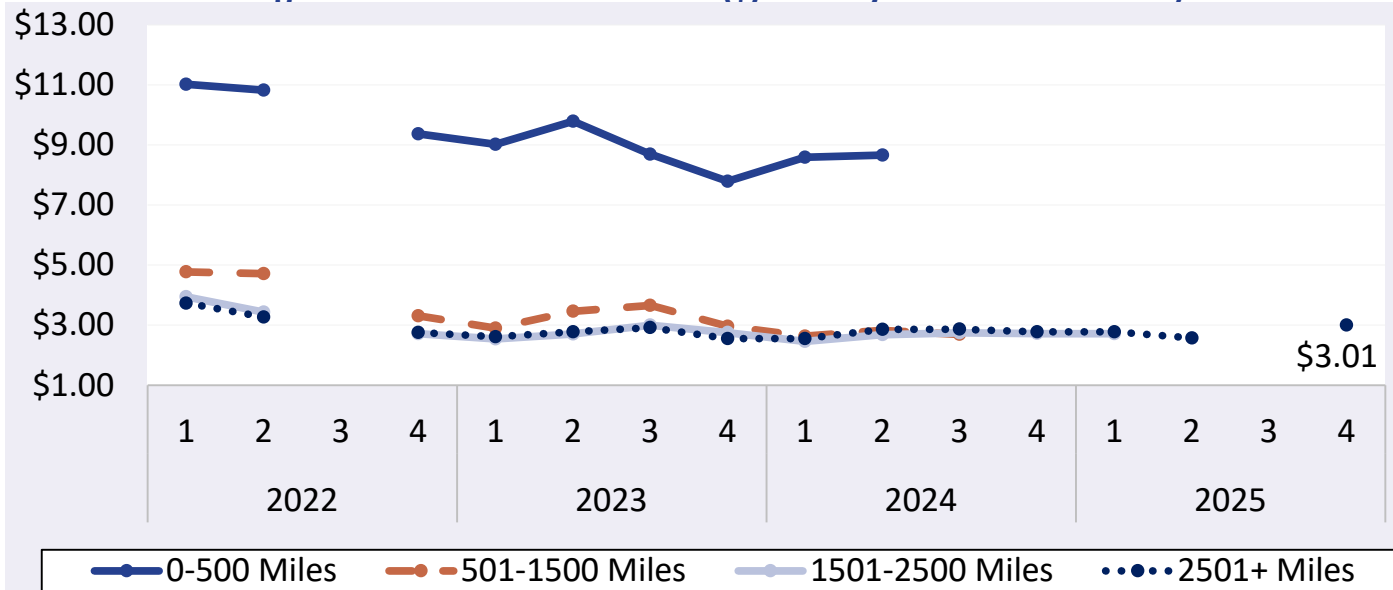
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.



AGRICULTURAL REFRIGERATED TRUCK QUARTERLY

Quarter 4, 2025

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



Note: Any gaps in the chart lines are the result of quarters with no reported data for the region.

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

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

Region/Reporting District	October	November	December	4th Quarter
Imperial, Coachella Valleys Ca, Central and Western Az, Mexico Crossings Through Calexico and San Luis	-	3	3.5	3.25
Regional Average Availability	-	3	3.5	3.25
Diesel Fuel Price (\$/gallon)	4.06	4.14	3.87	4.02

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

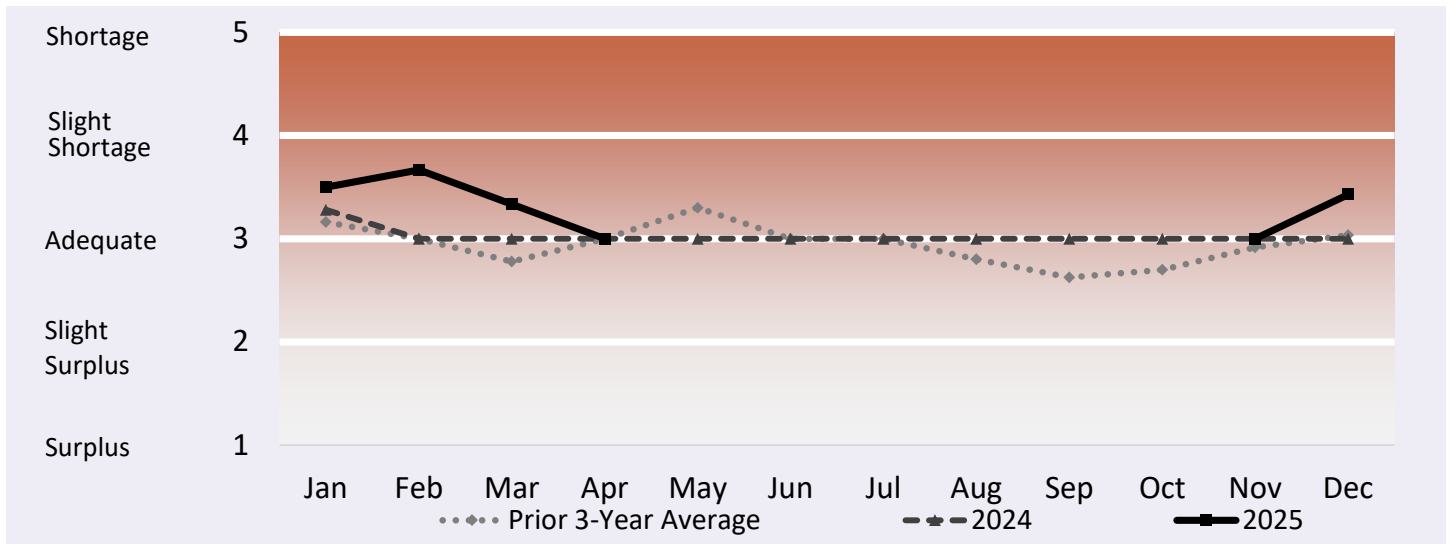
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.



AGRICULTURAL REFRIGERATED TRUCK QUARTERLY

Quarter 4, 2025

Figure 14: Refrigerated Truck Availability Monthly Ratings for Arizona



Note: Any gaps in the chart lines are the result of quarters with no reported data for the region.

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



AGRICULTURAL REFRIGERATED TRUCK QUARTERLY

Quarter 4, 2025

Florida

Volume

During fourth quarter 2025, total reported shipments of fruit and vegetables from Florida were 251,000 tons—up 41 percent year to year. The summed volume of the top five commodities shipped from Florida doubled year to year. All top five commodities saw year-to-year volume increases in the fourth quarter, including bell peppers (up 39 percent); strawberries (up 95 percent); sweet corn (up 98 percent); plum tomatoes (up 102 percent); and tomatoes (up 129 percent).

Rates

The quarterly average truck rate for shipments between 501 miles and 1,500 miles was \$2.02 per mile—down 37 percent quarter to quarter and up 3 percent year to year.

Truck Overview

Diesel fuel prices averaged \$3.66 per gallon—down 1 percent quarter to quarter and up 5 percent year to year. The Central and South Florida district did not report truck availability in October and reported adequate availability in November and December. The North, Central, and South Florida district reported adequate availability in October and November and did not report in December.

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

Commodity	4th Quarter 2025	Share of Florida Total	Previous Quarter	Same Quarter Last Year	Current Quarter as % change from:	
					Previous Qtr	Same Qtr Last Year
Tomatoes	68	27%	-	30	-	129%
Strawberries	38	15%	-	19	-	95%
Tomatoes, Plum Type	37	15%	-	18	-	102%
Corn, Sweet	22	9%	-	11	-	98%
Peppers, Bell Type	17	7%	-	12	-	39%
Top 5 Total	183	73%	-	91	-	100%
Florida Total	251	100%	22	179	1,047%	41%

Note: Any "-" in the table indicates no reported shipments during the quarter or a percentage change with an at- or near-zero denominator. Table values may not conform exactly due to rounding.

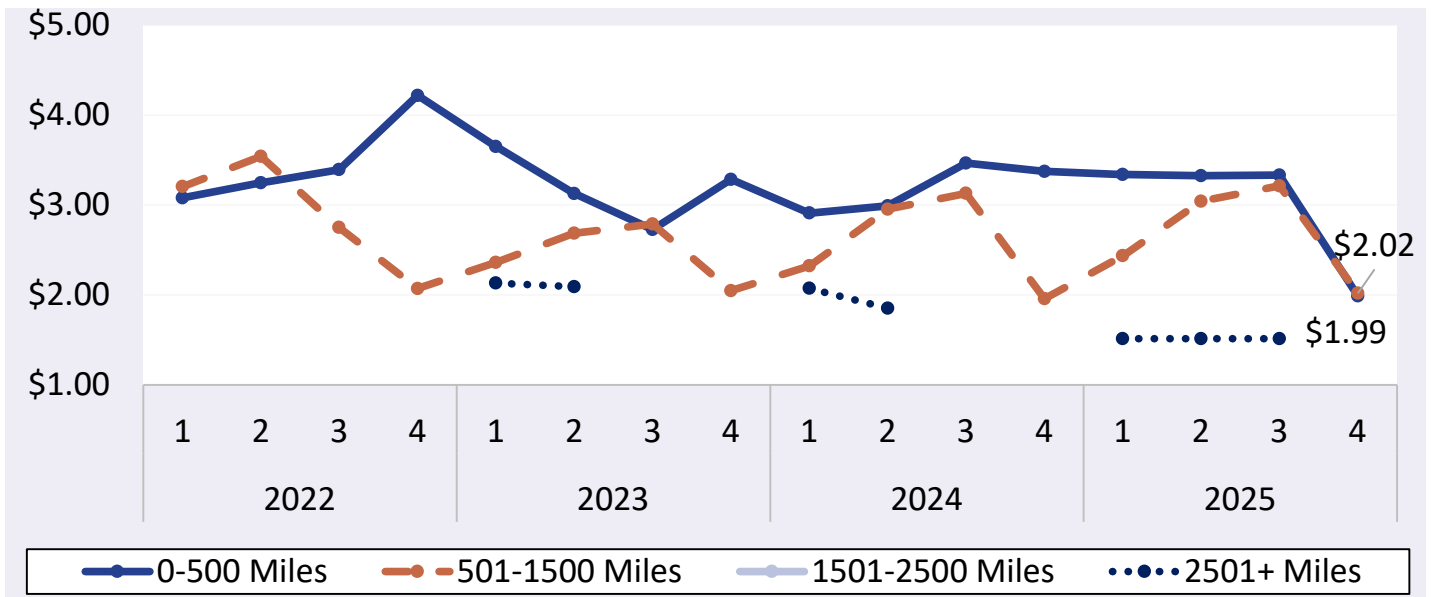
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.



AGRICULTURAL REFRIGERATED TRUCK QUARTERLY

Quarter 4, 2025

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



Note: Any gaps in the chart lines are the result of quarters with no reported data for the region.

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

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

Region/Reporting District	October	November	December	4th Quarter
Central and South Florida	-	3	3	3
North, Central and South Florida	2.83	2.89	-	2.86
Regional Average Availability	2.83	2.94	3	2.93
Diesel Fuel Price (\$/gallon)	3.63	3.75	3.59	3.66

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

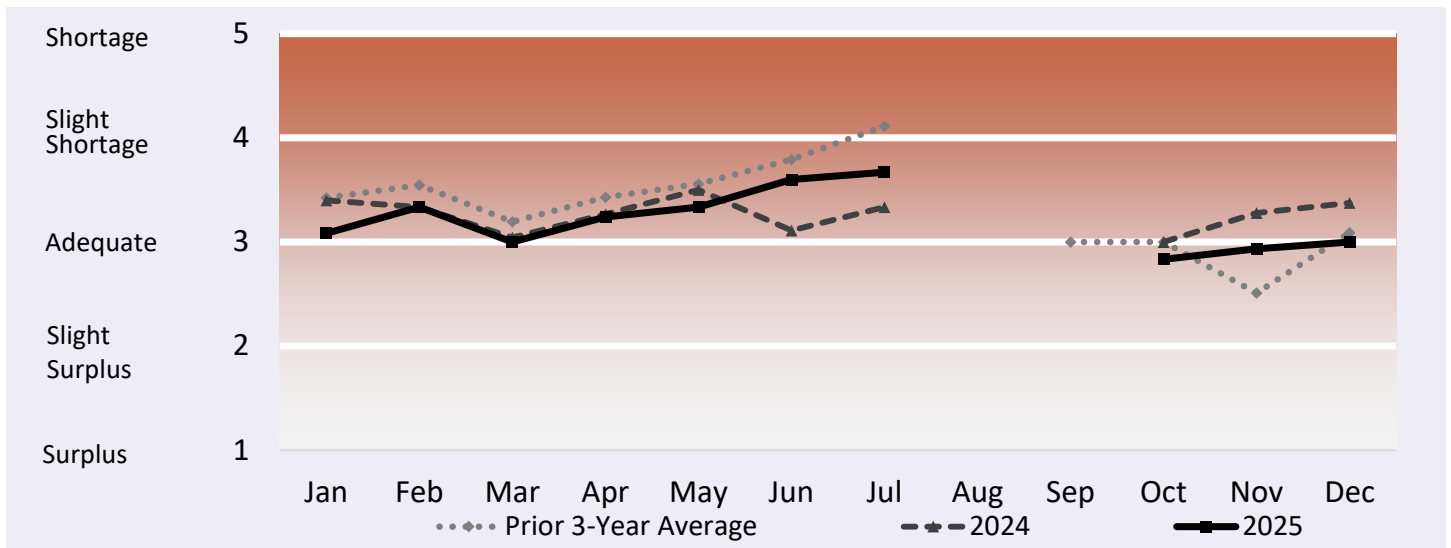
Source: AMS Transportation Economics Division analysis of AMS Specialty Crops Program Market News data.



AGRICULTURAL REFRIGERATED TRUCK QUARTERLY

Quarter 4, 2025

Figure 16: Refrigerated Truck Availability Monthly Ratings for Florida



Note: Any gaps in the chart lines are the result of quarters with no reported data for the region.

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



ADDITIONAL INFORMATION

Terms and References

Data Reporting and Publication Window

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

Data Sources

This information is compiled from the weekly Specialty Crops Truck Rate Report by USDA, Agricultural Marketing Service (AMS), Specialty Crops Program, Market News Division. The website is:

<https://www.marketnews.usda.gov/mnp/fv-home>.

Regional Markets

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

Shipment Volumes

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

Rates

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

Regional Rates

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

National Rates

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



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Related Websites

USDA's Agricultural Transportation Open Data Platform

<https://agtransport.usda.gov/>

Specialty Crops Program

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

Specialty Crops Truck Rate Report

https://mymarketnews.ams.usda.gov/filerepo/reports?field_slug_id_value=2375

Specialty Crops Movement Reporting

<https://www.marketnews.usda.gov/mnp/fv-report-config-step1?type=movement>

Economic Research Service Vegetable and Pulses

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

Economic Research Service Fruit and Tree Nuts

<https://www.ers.usda.gov/topics/crops/fruit-and-tree-nuts/>

National Agricultural Statistics Service, Crops

https://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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