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[Logistics Market Snapshot - October 2016](#) [1]

On 21 Oct, 2016



OCTOBER 2016 LOGISTICS MARKET SNAPSHOT

MULTIMODAL:	
Dow Jones Transportation Index	Dow Jones Transportation Index increased 2.05% during the month of September 2016, ending at a reading of 6,076 . (Most performance of transportation, and across U.S. companies in the transportation industry, average of September 1 st thru September 30 th .)
NASDAQ Transportation Index	NASDAQ Transportation Index increased 3.04% in September 2016, ending at a reading of 3,451 . (Weighted average of NASDAQ listed companies classified as transportation companies, average of September 1 st thru September 30 th .)
DOT Freight Transportation Index	The USDOT's freight transportation services index decreased 3.8% in August, to a reading of 122.3 . The decrease was due to declines in pipelines, rail carloads, and particularly trucking, while all other modes grew or were stable. (Source: US DOT)
Case Freight Index	The August shipments index increased 0.4% from the previous month to 1.121 and decreased 1.5% year-over-year. The August expenditures index decreased 3.3% for the month to 2.276 , and decreased 6.3% year-over-year. (Source: Case Information Systems CaseInfo.com)
Import Volumes	In August, the U.S. imported \$185.4 billion of cargo, decreasing 0.4% from July. The August real dollar imports of petroleum (\$58.8 billion) were the highest since May 2013. (Source: US Census)
Export Volumes	In August, the U.S. exported \$225.3 billion of cargo, increasing 1.0% from July. The August exports of capital goods (\$42.1 billion) were the lowest since September 2013. (Source: US Census)
Import & Export Price Index	U.S. import prices increased 0.2% in September. The September advance was driven by higher fuel prices. U.S. export prices increased 0.3% in September, as rising nonagricultural prices more than offset declining agricultural prices. (Source: Bureau of Labor Statistics)
Shippers' Conditions Index	The Shippers' Conditions Index was at a near-neutral reading of -0.1 in July , a minuscule improvement from June. The index will continue to hover around equilibrium until early 2017 when steady increases in regulatory drag may increase trucking costs due to tightened capacity. (Source: FTR Transportation Intelligence ftrintel.com) Figures below zero indicate a less than ideal environment for shippers!
E-Commerce	E-Commerce revenue was up 11% in September compared to September 2015. Mobile shopping (phones and tablets) accounted for 29% of online shopping, up from 26% in September 2015. The estimate of U.S. retail e-commerce sales for the second quarter of 2016, adjusted for seasonal variation, was \$17.3 billion , an increase of 4.5% from the first quarter of 2016. (Source: eComma E-Commerce Pulse, US Census)
Multimodal News Clips:	<ul style="list-style-type: none"> U.S. light vehicle sales were a seasonally adjusted and annualized 37.7 million in September 2016, up 4.4% from August and down 0.7% from September 2015. Year-to-date sales in 2016 through September were 13.04 million units, fractionally higher than in 2015. 2015 was the all-time record year for sales. (Source: AAR) UPS has partnered with robot maker CyPhy Works to test the use of drones to make commercial deliveries to remote or difficult to access locations. The drone tests with UPS allow CyPhy Works to gather engineering and cost information and then work with UPS to look at where drones can add the most value to UPS' extensive network. However, newly revised federal aviation regulations don't permit commercial drones to fly over people not involved in their operations and require them to remain within line of sight of their operators at all times, effectively rendering commercial deliveries impossible. But those restrictions aren't keeping drone-makers and their partners from racing to develop technology suitable for commercial deliveries while they work with regulators to tweak existing rules. (Source: ftrintel.com)
RAIL:	
U.S. Freight Rail Traffic	Originations of carloads in September 2016 totaled 1,068,644 , a decrease of 3.6% from September 2015 and the 20th straight year-over-year monthly decline . The 3.4% decline in September was the lowest year-over-year monthly decline in a year. Nine of the 20 traffic categories tracked by AAR had higher carloads in September 2016 than in September 2015, including grain, waste & nonferrous scrap, and nonmetallic minerals. (Source: AAR.org) (Report includes rail car loadings by 20 different major commodity categories as well as intermodal units)
U.S. Intermodal Rail Traffic	Intermodal rail traffic totaled 3,040,334 units in September 2016, a decrease of 4.2% from September 2015. This is the seventh straight year-over-year monthly decline for intermodal. Average weekly intermodal volume in September (260,234 units) was the lowest weekly average for September since 2013. (Source: AAR.org) (Report includes rail car loadings by 19 different major commodity categories as well as intermodal units)
Intermodal Competitive Index	The Intermodal Competitive Index fell to a reading of 0.6 in July. Intermodal volume was unexpectedly weak across the board in July, and lower diesel prices were also a factor in the decline in intermodal volume. July 2016 had two fewer working days than July 2015, a 3% difference, which may have affected the numbers as well. (Source: FTR Transportation Intelligence ftrintel.com) Index is only as good as the volume data is.

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