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## [Logistics Market Snapshot - July 2016](#) **[1]**

On 20 Jul, 2016



# JULY LOGISTICS 2016 MARKET SNAPSHOT

## MULTIMODAL:

<b>Dow Jones Transportation Index</b>	Dow Jones Transportation index <b>decreased 3.7%</b> during the month of June 2016. (Stock performance of twenty large, well-known U.S. companies in the transportation industry, average of June 1 <sup>st</sup> thru June 30 <sup>th</sup> )
<b>NASDAQ Transportation Index</b>	NASDAQ Transportation Index <b>decreased 4.4%</b> in June 2016. (Averaged share weights of NASDAQ-listed companies classified as transportation companies, average of June 1 <sup>st</sup> thru June 30 <sup>th</sup> )
<b>DOT Freight Transportation Index</b>	The USDOT's freight transportation services index <b>increased 0.2%</b> in May. The index's reading of 121.8 was 28.6% above the April 2009 low during the most recent recession, and was 1.5% below the all-time high level of 123.6 in December 2014. (Source: US DOT)
<b>Cass Freight Index</b>	The June shipments index <b>increased 1.7%</b> from the previous month to 1.11 and <b>decreased 4.3%</b> year-over-year. The June expenditures index <b>increased 3.9%</b> for the month to 2.37, and <b>decreased 8.8%</b> year-over-year. (Source: Cass Information Systems   CassInfo.com) (Based upon transportation dollars and shipments of Cass clients comprised of over 400 shipping companies)
<b>Import Volumes</b>	In May, the U.S. <b>imported \$182.1 billion</b> of cargo, <b>increasing 1.9%</b> from April. The May imports of services (\$41.4 billion) were the <b>highest on record</b> . (Source: US Census)
<b>Export Volumes</b>	In May, the U.S. <b>exported \$119.8 billion</b> of cargo, <b>decreasing 0.2%</b> from April. (Source: US Census)
<b>Import &amp; Export Price Index</b>	U.S. import prices <b>increased 0.2%</b> in June. The increase was driven by higher fuel prices, which more than offset a decline in nonfuel prices. U.S. export prices <b>increased 0.8%</b> in June. Both agricultural and nonagricultural export prices contributed to the June advance. (Source: Bureau of Labor Statistics)
<b>Shippers Conditions Index</b>	The Shippers Conditions Index was 1.5 in April, <b>up from 0.4 in March</b> and the <b>highest sustained level since 2011</b> . (Source: FTR Transportation Intelligence   ftrintel.com) (Figures below zero indicate a less-than-ideal environment for shippers)
<b>E-Commerce</b>	E-Commerce revenue was up 7% in June compared to June 2015. Mobile shopping (phones and tablets) accounted for 30% of online shopping, up from 27% in June 2015. (Source: Custora E-Commerce Pulse)
<b>Multimodal News Clips:</b>	<ul style="list-style-type: none"> <li>• U.S. light vehicle sales were a seasonally adjusted and annualized <b>16.6 million in June 2016, down 4.5%</b> from May and <b>up 2.4%</b> from June 2015. (Source: AAR)</li> <li>• The Intermodal Association of North America (IANA) has launched its own online portal to boost efficiency in the drayage sector, connecting drivers looking to return a container or chassis with those looking to pick one up. It's just one example of a growing number of new applications aimed at cutting down on the number of empty and unproductive miles driven by port drivers in the U.S. every day. (Source: IOC)</li> </ul>

## RAIL:

<b>U.S. Freight Rail Traffic</b>	Originations of carloads in June 2016 totaled 1,245,025, a <b>decrease of 7.0%</b> from June 2015 and the <b>17<sup>th</sup> straight year-over-year monthly decline</b> . Weekly average total carloads in June 2016 were 249,005, the <b>lowest weekly average for June since 1988</b> , when AAR's data began. (Source: AAR.org) (Report includes rail carloadings by 29 different major commodity categories as well as intermodal units)
<b>U.S. Intermodal Rail Traffic</b>	Intermodal rail traffic totaled 1,295,240 units in June 2016, a <b>decrease of 5.6%</b> from June 2015. This is the fourth straight year-over-year percentage decline for intermodal and the seventh in the past eight months. (Source: AAR.org) (Report includes rail carloadings by 29 different major commodity categories as well as intermodal units)
<b>Intermodal Competitive Index</b>	The Intermodal Competitive Index <b>fell to a level of 3.5</b> in May. The May reading reflects that the domestic intermodal sector is still experiencing somewhat difficult competitive conditions, but that the overall situation remains mildly favorable from an intermodal standpoint. (Source: FTR Transportation Intelligence   ftrintel.com) (Index includes factors like relative rates vs. truck, industry capacity vs. demand, fuel prices, and intermodal service levels. Figures above 0 indicate favorable conditions for intermodal to compete with truck)
<b>Railroad Fuel Price Index</b>	The index of average railroad fuel prices in May was 290.6, <b>up 14.0%</b> from the previous month and <b>28.0% lower</b> year-over-year. (Source: AAR.org) (Average monthly price for gallons purchased by freight railroads; includes federal excise taxes, transportation, and handling expenses)
<b>Class 1 Railroad Employment</b>	Railroad employment in May <b>decreased 0.27%</b> from the previous month, to 152,726 employees total. Since April 2015, Class 1 rail employment has fallen each month. (Source: U.S. STB)
<b>Short Line Rail Traffic</b>	In June 2016, short line railroad shipments across North America <b>decreased 6.8%</b> compared to the same month last year. A sampling of about 431 small railroads in the U.S. and Canada <b>loaded 632,075 railcars</b> and intermodal units during the month of June. (Source: RailConnect Index   GET Transportation)



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