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On 21 Oct, 2016



**Georgia INNOVATION | LOGISTICS** **OCTOBER 2016** **LOGISTICS MARKET SNAPSHOT**

**MULTIMODAL:**

- 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<sup>st</sup> thru September 30<sup>th</sup>.)
- NASDAQ Transportation Index** **increased 3.04%** in September 2016, ending at a reading of **3,451**. (Average of the weights of NASDAQ listed companies classified as transportation companies, average of September 1<sup>st</sup> thru September 30<sup>th</sup>.)
- DOT Freight Transportation Index** The USDOT's freight transportation services index **decreased 1.8%** 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 1.3%** for the month to **2.276**, and **decreased 6.3%** year-over-year. (Source: Case Information Systems | [CaseInfo.com](http://CaseInfo.com)) (Month-over month percentage change and shipments of Case clients comprised of over 400 shipping companies)
- 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](http://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:**
  - U.S. light vehicle sales were a seasonally adjusted and annualized **17.7 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: [CBR Intel](http://CBR Intel))

**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 **20<sup>th</sup> 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 20 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](http://ftrintel.com)) (Index includes factors like volume rates)

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