

# Transport, Logistics & Supply Chain Job Index

## QUARTERLY REPORT

### KEY FINDINGS

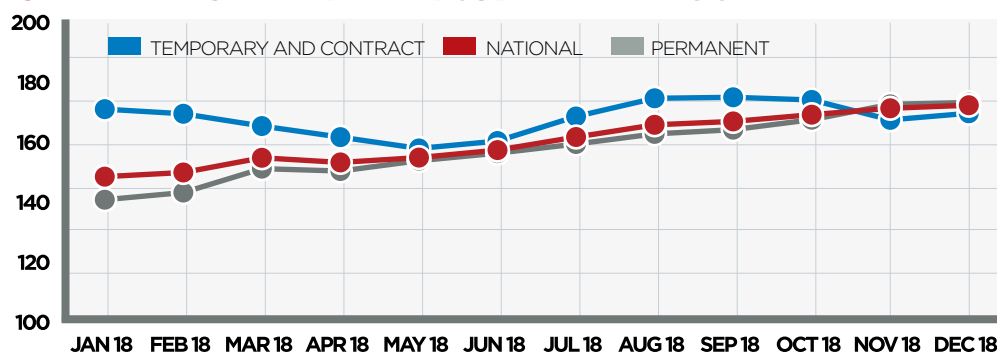
- ⚙️ The Labourforce/Impex TL&SC Job Index rose 3.3% taking it to 171.38, a new record high
- ⚙️ Job opportunities are now 14.5% higher than last December
- ⚙️ The Permanent Job Index expanded by 22.3% during 2018 and is also in record territory
- ⚙️ Contingent declined 4.4% year on year. There has been a broad move back from contingent to permanent employment
- ⚙️ VIC/TAS have been "on fire" this year. The VIC/TAS Job Index added a further 5.2% in the latest quarter leaving it a massive 22.6% higher than a year ago
- ⚙️ Both NSW/ACT and Queensland grew by 14.6% during 2018
- ⚙️ What a year for Road Transport! Demand has risen 33.6% in just 12 months
- ⚙️ Air, Sea and Rail Transport ended the year in fine style rising a massive 18.6% in just three months
- ⚙️ Transport and Logistics employers ended the year as they started. In great shape! The year could not have ended better - up 43.8% year on year
- ⚙️ The laggard last year was Retail and Wholesale. Job opportunities are down 14.9% reflecting the disruption in the sector

### Index closes year on record high. Permanent jobs driving expansion

It was another strong quarter for the Transport Logistics and Supply Chain sector with the Labourforce/Impex Job Index rising 3.3%. The Index is at a new record high. Job opportunities are now 14.5% higher than 12 months ago. This is unlikely to be matched by many other industries and is well above the national norm. Once again permanent jobs drove this expansion. Demand rose 3.3% in the December quarter. Employers faced with skills shortages are opting for permanent hires to try to lock in scarce talent. The contingent

market has been quite volatile this year. It grew steadily early on, plateaued and fell 3.1% in the final quarter. The net result is a 4% decline year on year. There has been a broad move across many occupations and industries back from contingent to permanent employment. This is a combination of skills shortages and some landmark cases taking the shine off "insecure work". TL&SC is no exception. The Deliveroo case in the UK has cast doubt on the employment practices of many new "gig economy" jobs, many in the transport arena.

#### CHART 1 NATIONAL INDEX AND JOB TYPE ANALYSIS

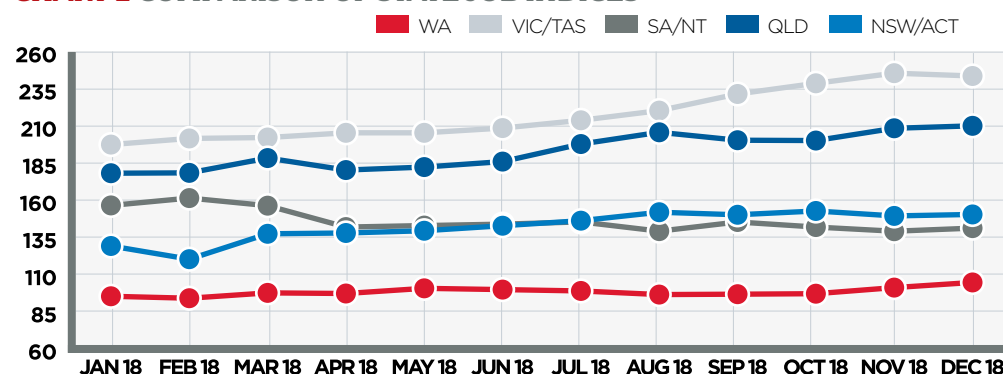


### VIC/TAS remarkable growth continues, nation's strongest region

Both VIC/TAS and Queensland have been "on fire" this year. The VIC/TAS Job Index grew a massive 11% in the September quarter and added a further 5.2% in the latest quarter. In December 2018 VIC/TAS was the strongest region and at a record level, making this year's growth that much more remarkable. Queensland's growth is nearly as impressive. A rise of 4.8% in the last three months contributes to a 14.6% expansion annually in Queensland. Queensland's

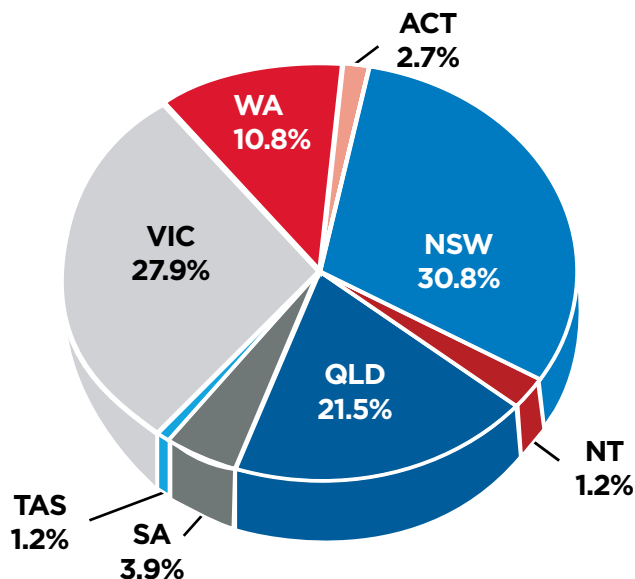
Index cleared the 200 mark in August and is now on a new record high level of 210.19. Interestingly NSW/ACT annual growth was also 14.6%. Demand increased strongly in the first half of the year but has really only bounced along the top for much of the second. Western Australia finished the year with the highest quarterly percentage growth of all regions at 8.2%. The WA Index rose above 100 for the first time in November and the December level is the highest since March 2015.

#### CHART 2 COMPARISON OF STATE JOB INDICES



**CHART 3**  
ANALYSIS OF JOB  
ADVERTISEMENTS BY  
STATE AND TERRITORY  
DECEMBER 2018

With all states performing well it's the relative strength that dictates which states have a net gain or loss. On 2018 performance Victoria has, unsurprisingly, seen its share rise 1.7% during the year. The other larger states have all fallen but none by more than 0.5%. This year the growth of the "pie" has been more important than the share!



## OCCUPATIONAL ANALYSIS

### Road transport keeps on delivering with stellar growth

What a year for Road Transport! Despite a 3.3% fall in the month of December demand has risen 33.6% in just 12 months. The move from retail to online shopping together with the massive increase in home food delivery will have contributed to this growth.

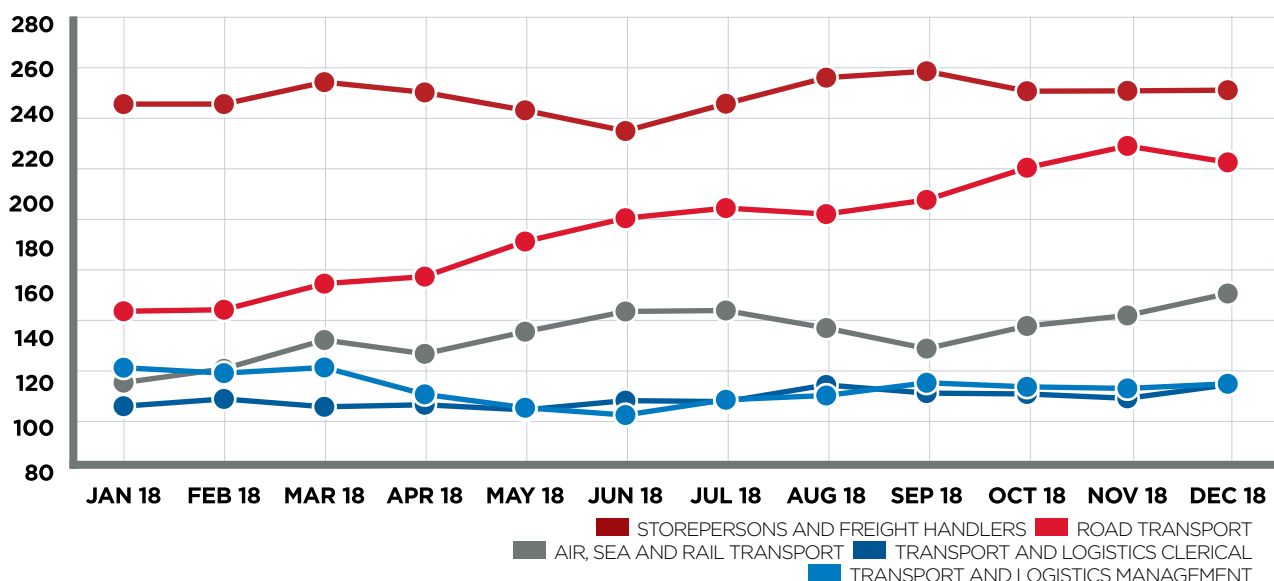
Air, Sea and Rail Transport ended the year in fine style rising a massive 18.6% in just three months. This takes its rise to 35.8% for the year, another great performance. The Index is on 156.39 which exceeds the prior record only set in July.

Storepersons and Freight Handlers maintained their normal seasonal trajectory. The 11.6% rise in September was followed by a 3.3% fall in the last three months. The record

of 255.53 was set in September so a marginal decline since then still leaves the market at a very high level. The only surprise is that this is just 1.7% higher than a year ago.

The quarter and indeed the year has been less spectacular in the white collar space. TL&SC Management ended the year on a sour note drifting 0.4% in the December quarter and taking the annual decline to 4%. This is not a large decline but is somewhat disappointing given the rapid expansion in so many other transport occupations. TL&SC Clerical was a bit better rising 3.3% in the last three months and by 7.6% in the last twelve months. Clerical ended the year at the highest level since May 2017.

**CHART 4** ANALYSIS OF JOB ADVERTISEMENTS BY SPECIALIST OCCUPATION



# INDUSTRY ANALYSIS

## Transport and logistics powering on to record highs

Transport and Logistics employers ended the year as they started. In great shape! Job vacancies rose by 14.8% in the final quarter from an already high base. Growth has not been even throughout the year. There were massive spurts of growth in March, April and May and again in November – December. All five months were records at that time. The year could not have ended better – up 43.8% year on year and at a new record high index of 261.15.

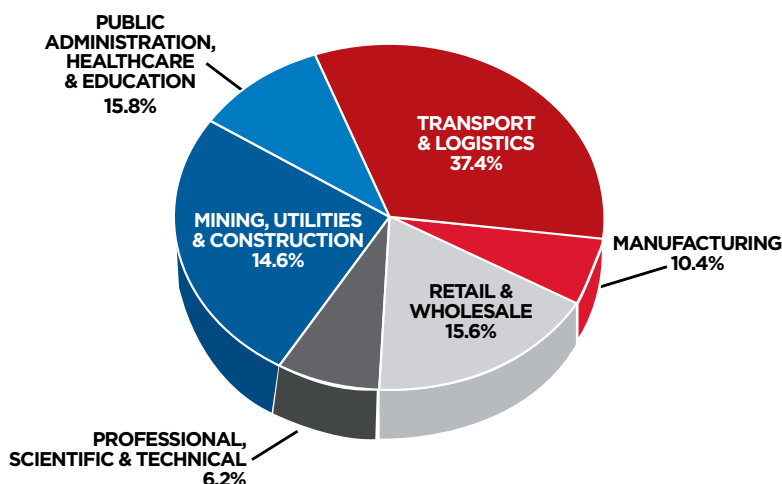
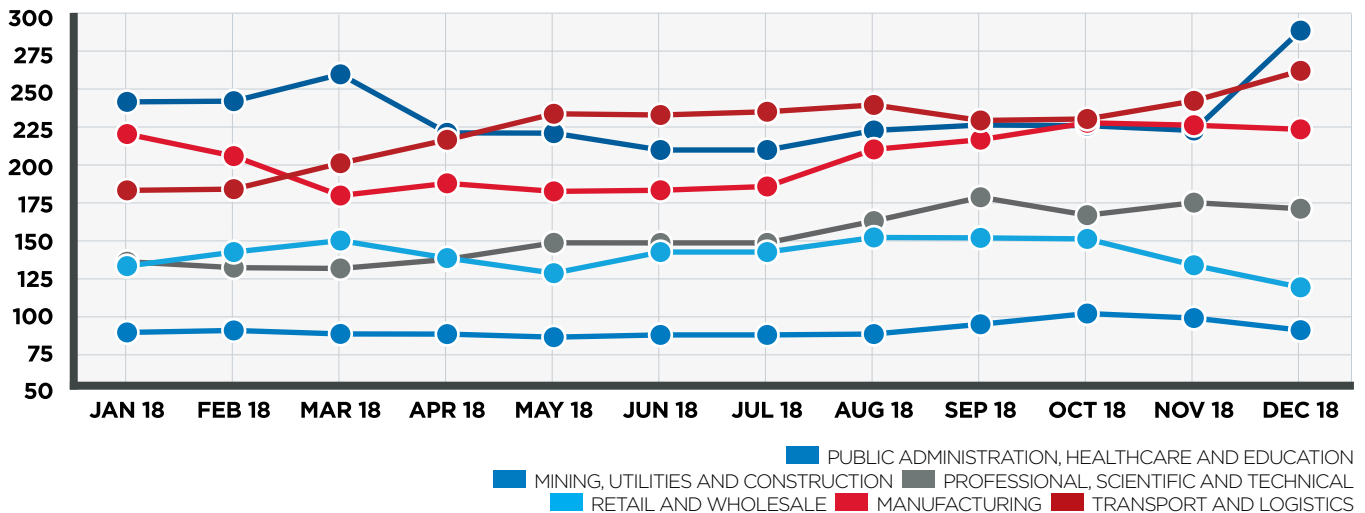
It has also been a remarkably good year in the Public Sector. It has enjoyed a 28.1% annual rise in job opportunities. Its Index, inevitably a record too, on 288.13 is even higher than Transport and Logistics. This result correlates well with the reported growth in rail and road transport jobs.

The laggard last year, no surprises, was Retail and Wholesale. Job opportunities are down 14.9% reflecting the

disruption in the sector. While obviously bad news for anyone working directly in retail the good news is that online purchasing is creating more jobs. This trend is clear in both the growth in Road Transport as an occupation and in the Transport and Logistics sector.

The graph below provides a breakdown of the proportions of each major industrial sector:

**CHART 5 ANALYSIS OF JOB ADVERTISEMENTS BY INDUSTRY**



**CHART 6 THE PROPORTION OF JOB ADVERTISEMENTS BY INDUSTRY DECEMBER 2018**

No prizes for guessing which sectors grew and fell the most. Transport and Logistics rose 6% in the 12 months taking its share to 37.4%, the highest so far recorded. Retail and Wholesale shrank a massive 3.5%. Interestingly Mining, Utilities and Construction slipped 2.4% as a result of a 4.7% decline in their job index over the year. 2019 could prove a tough year in this sector too.

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For more information about Labourforce Impex Transport, Logistics & Supply Chain Job Index

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