

Transport, Logistics & Supply Chain Job Index

REPORT

KEY FINDINGS

- ⚙️ The Labourforce Impex Transport, Logistics and Supply Chain Job Index fell 4.7% in April
- ⚙️ The Index now sits at 110.99, demand up by 12.8% over 12 months
- ⚙️ Temporary and Contract demand fell 2.6% but still up 26.6% over 12 months
- ⚙️ Demand in Queensland rose 7.1% in April, now narrowly eclipsing Vic/Tas as top performing region
- ⚙️ Both Victoria and Western Australia experienced big falls in April
- ⚙️ The great run for Transport, Logistics and Supply Chain Clerical has ended, falling 4.4%
- ⚙️ But demand for TL&SC Management roles fell for fourth consecutive month
- ⚙️ Confidence shown by Transport and Logistics employers in early 2015 lost momentum in April with demand easing 3.5%
- ⚙️ The situation in Mining, Utilities and Construction remains bleak. Demand fell a further 8.5% in April

GET SMART SHARPEN YOUR THINKING

**FIND
US AT
E14**

SMART Conference is recognised within Australia and internationally as the leading supply chain and logistics event in the Australasian region. That is why the Labourforce group will be attending.

You can find us near the coffee cart at E14. The event has grown significantly and currently has more than 600 delegates who will attend the conference & expo.

SMART conference will be held for the first time outside of Sydney, at the Melbourne Convention & Exhibition Centre on 26 & 27 May 2015. It promises to continue the strong tradition of delivering relevant supply chain & logistics practices, strategies and valuable information along with many networking opportunities directly to industry leaders.

This year, SMART will be co-locating with National Manufacturing Week, which will have the further benefit of additional leverage to the 11,000 plus attendees.

SMART conference & expo has been held every two years since its inception in 1993, with average attendance exceeding 600 delegates. To find out more, go to www.smartconference.com.au

For those who are not attending the SMART Conference, but want to find how Labourforce, ImpEx or LabourHealth can assist your business to save time, increase your productivity and give you peace of mind, go to our websites listed below or call us at any time for a no obligation conversation.



**SAVE THE
DATE**

smart
supply chain & logistics
CONFERENCE

26-27 May 2015

**Melbourne
Convention &
Exhibition Centre**

**AUSTRALIA'S
LEADING
SUPPLY CHAIN
CONFERENCE
& EXPO**

NATIONAL JOB INDEX

Index: 4.7% April fall - largest this year

The Transport Logistics and Supply Chain jobs market experienced a substantial fall in April with job advertisements falling 4.7% nationally. This is the largest fall this year but with the Labourforce Impex Job Index still at 110.99 the market can still be considered strong. Over the last six months the Index is down 6.5% but it is

up 12.8% over the last 12 months. We would have to see continued decline to conclude that a consistent downward trend exists.

What has been evident in early 2015 is the more concerted fall in Permanent vacancies. These fell 5.5% in April. The Index sits at 106.98, a 8.5% rise over a year but the recent movement

down suggest employers may be less confident at the moment. Temporary and Contract job advertisements also fell, but only by 2.6%, with the Index retreating from 127.04 to 123.78. Despite a degree of volatility over the last quarter the trend remains positive with temp and contract vacancies up 26.6% over the last 12 months.

The Labourforce group of Companies is committed to save you time, increase your productivity and give you peace of mind. That is why, we work with the best in the transport, supply chain and logistics industry.

We are continually working hard to improve our own processes to pass our expertise and savings on to you.

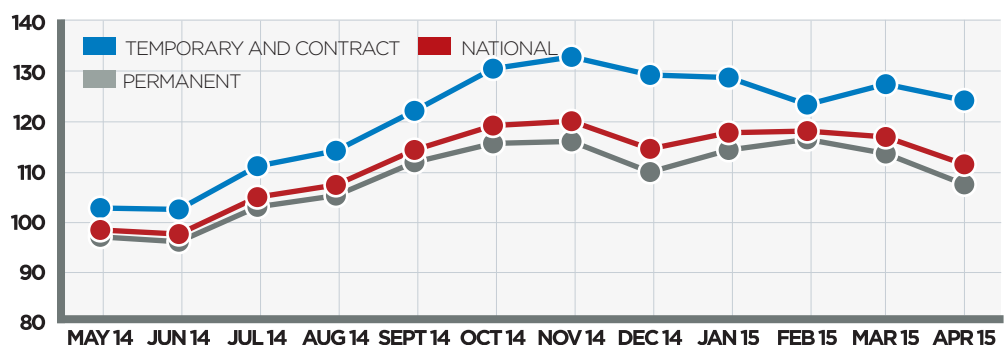
We are the only recruitment agency to drug and alcohol test all of our temporary workers before we let them step foot in your workplace. We have the most experienced permanent recruitment professionals in the sector, and we have teams of occupational nurses and accredited staff for drug and alcohol testing across Australia.

**Contact
us today.**

Regan Brown

Regan Brown
CEO
LABOURFORCE

CHART 1 NATIONAL INDEX AND JOB TYPE ANALYSIS



STATE ANALYSIS

WA and Victoria: Down, down, down

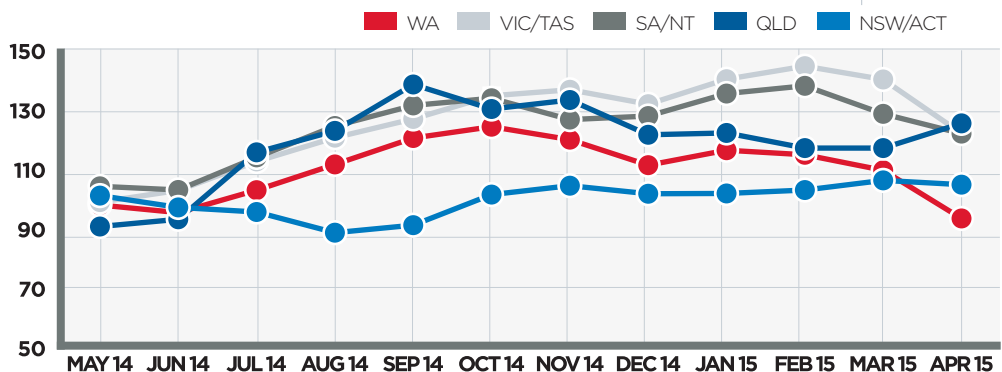
Western Australia experienced another significant fall in vacancies advertised in April, falling 14.9%. Advertising volumes in WA have fallen 25.0% over six months, a consequence of the weak Mining and Resources sector.

Victoria also took a big hit in April, falling 10.8%. But the market has been strong until recently and the market is still 23.1% above the level a year ago.

The big surprise was the big pickup in the Queensland market. It rose 7.1% and, with an Index at 124.81 narrowly eclipsing Vic/TAS. This is a remarkable performance given how much the weakness in the mining and resources sector has slowed the Queensland economy.

The graph below provides a breakdown of the proportions of each state and territory:

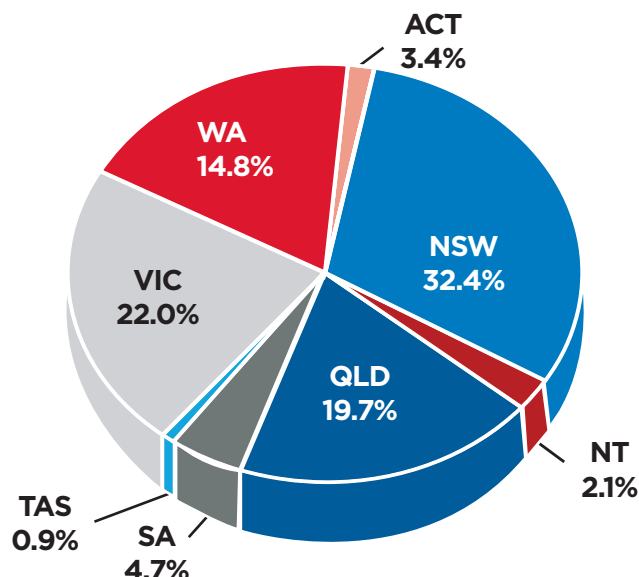
CHART 2 COMPARISON OF STATE JOB INDICES



MAY 2015

CHART 3 ANALYSIS OF JOB ADVERTISEMENTS BY STATE AND TERRITORY APRIL 2015

The recent softening of demand in Victoria has taken its toll with its overall share of the market slipping again, this month from 23.5% to 22.0%. Queensland has picked up much of the slack with its share rising to 19.7% of all job advertisements posted nationally, a big jump from 17.6% in March.



OCCUPATIONAL ANALYSIS

Storepersons & Freight Handlers jobs stall - one to watch

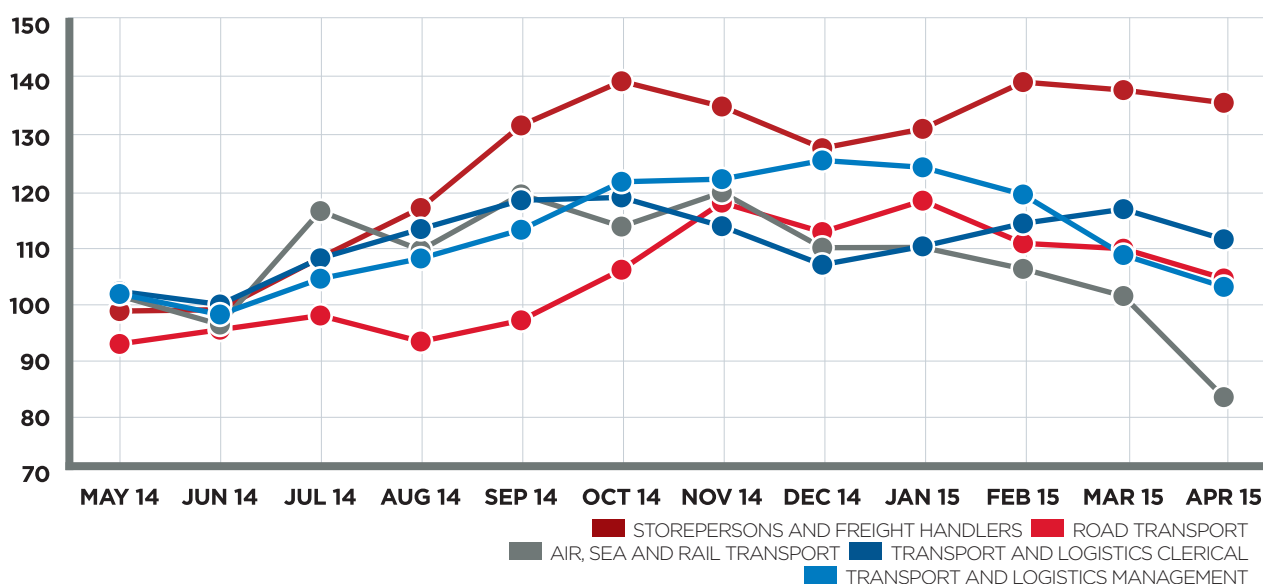
All occupational groups suffered declines in opportunities in April. The worst was Air, Sea and Rail Transport which fell a massive 18%. It is however a small occupational category so small changes tend to cause significant variations. Time should be given to see whether this is sustained or merely statistical noise.

The one to really watch is Storepersons and Freight Handlers which was the major driver of jobs growth in 2014 but which

has stalled over the last two months. It fell just 1.7% but this is a far cry from the dramatic increases seen in the second half of 2014.

The great run for Transport, Logistics and Supply Chain Clerical has finally come to an end. Demand fell 4.6% after four successive months of growth. TL&SC Managerial positions had a similarly weak April. It fell 5.3% the fourth consecutive monthly fall.

CHART 4 ANALYSIS OF JOB ADVERTISEMENTS BY SPECIALIST OCCUPATION



INDUSTRY ANALYSIS

Demand eases. Confidence down

In April the confidence shown by Transport and Logistics employers in early 2015 lost momentum. Demand eased 3.5%. The trend has been very positive for some time so let's hope this is an aberration and that the positive momentum will return in May.

The opposite has occurred in the public sector where demand for Transport, Logistics and Supply Chain specialists, which had fallen for three successive months, enjoyed a

5.5% rebound. We previously reported that the falls could be attributed to three state elections and, now that these are behind us, we have seen demand pick up again.

The situation in Mining, Utilities and Construction remains bleak. Demand fell a further 8.5% in April, that's 24.3% in the last six months. The challenges facing mining and resources is well known but utilities may also be suffering from rationalisation.

CHART 5 ANALYSIS OF JOB ADVERTISEMENTS BY INDUSTRY

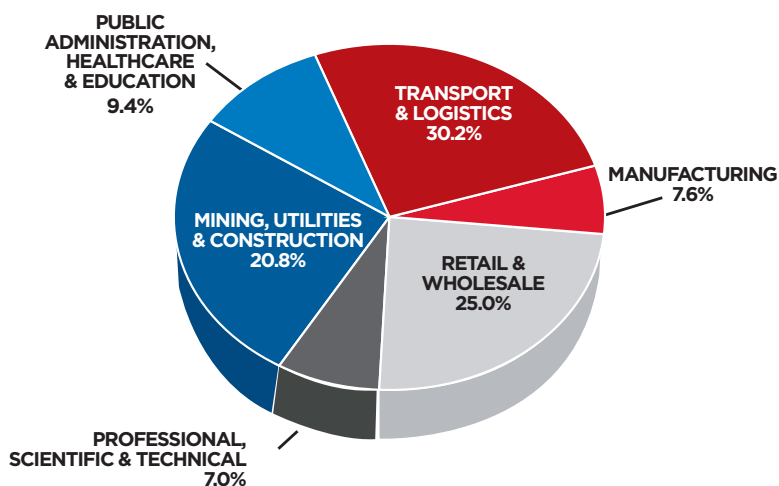
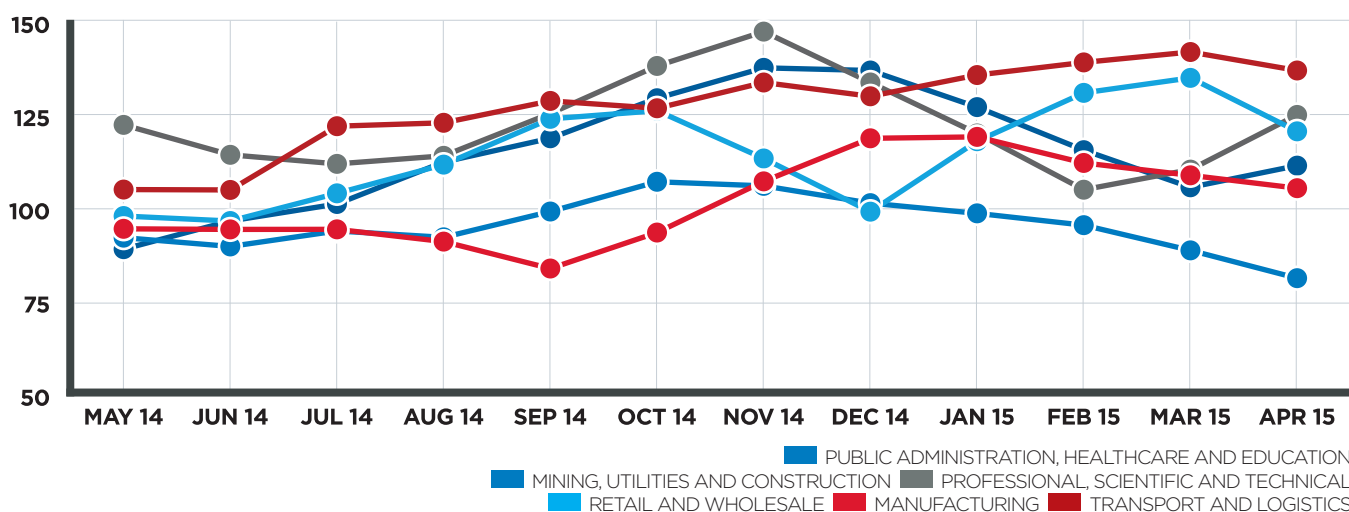


CHART 6 THE PROPORTION OF JOB ADVERTISEMENTS BY INDUSTRY APRIL 2015

Mining, Utilities and Construction continues its contraction in advertising volumes and therefore market share has fallen too. It now represents 20.8% of all vacancies advertised, down from a peak of 30.3% in December 2013.

In October the Labourforce / Impex Transport, Logistics and Supply Chain Job Index was recalibrated to take account of the demise of Mycareer.com.au, a single but significant source of job advertisement data. This has involved a complete rerun of all historical data. This will produce more accurate and less volatile data. However as all indices have been restated comparison to prior reports is not possible.

DATA SUPPLIED UNDER COPYRIGHT BY HRO2 RESEARCH PTY LTD

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

LABOURFORCE PHONE 13 30 91 EMAIL recruitment@labourforce.com.au

IMPEX PHONE 1300 85 85 15 EMAIL info@impexpersonnel.com.au

LABOURHEALTH PHONE 1300 306 866 EMAIL info@labourhealth.com.au