

Transport, Logistics & Supply Chain Job Index

REPORT

KEY FINDINGS

- ⚙️ The Labourforce / Impex Job Index rose 1.1% in July
- ⚙️ The national Index sits at 128.32, inching towards the record set in February this year
- ⚙️ All this growth was seen in the Temporary and Contract market where demand rose 8%
- ⚙️ Temp demand is 28.2% higher than this time last year and it looks certain to rise
- ⚙️ The Permanent market however slipped, falling 1.8% from the record high set in June
- ⚙️ Job opportunities in NSW grew by a further 3% in July raising its Index to 136.06, a new record
- ⚙️ Demand rose 3.8% in WA, a welcome relief for job seekers in the West
- ⚙️ Market driven by increased demand for Storepersons and Freight Handlers which rose 1.9% in July and 5.5% for the last quarter
- ⚙️ TL&SC Management roles has picked up again after faltering in June. It rose 4.3% taking the Index to 124.90, its highest point ever
- ⚙️ July saw encouraging growth amongst Mining, Utilities and Construction employers. Demand rose 7% and is up 18.6% compared to July 2015
- ⚙️ Transport and Logistic employers have been the driving force behind the positive market. Demand has risen 40.8% in the last 12 months but it actually slipped by 2.3% in July

NEW FAST TRACKED CUSTOMS PROCESSING FOR AUS & NZ

Trusted Trans-Tasman exporters will be rewarded with fast-tracked customs processing at Australian and New Zealand borders under a new arrangement between the two countries.

The Australian Department of Immigration and Border Protection and New Zealand Customs Service signed a Mutual Recognition Arrangement (MRA) last month, to recognise the supply chain security programmes of both countries.

The arrangement would benefit members of the Australian Trusted Trader (ATT) programme and the NZ Customs Secure Export Scheme.

The MRA will allow \$10.5 billion of Australian and New Zealand exports to be fast tracked.

"The MRA provides benefits to trusted traders of both countries and provides border agencies greater end-to-end assurance of imports and exports.

"Reducing the regulatory duplication between the two schemes will make it easier for Australian and New Zealand businesses to trade with each other and boost the international competitiveness of both countries," Australian Border Force (ABF) Commissioner Roman Quaadvlieg said.



TRANS TASMAN SAFETY

In New Zealand earlier this year the new Health and Safety at Work Act (HSWA) came into effect. This new act is modelled on the Australian harmonised Workplace Safety laws.

The objects and practices of the Act are very similar to Australian laws. This was the largest reform to NZ workplace safety laws since 1992, and aims to reduce workplace deaths by 25% by 2020.

Does your contingent workforce provider comply with the new Act?

NATIONAL JOB INDEX

Steady growth driven by strong temporary and contract market

The Labourforce/Impex Transport Logistics and Supply Chain Job Index enjoyed another month of growth rising by 1.1%. The index now sits at 128.32 inching further towards the record of 130.14 set in February.

All this growth was seen in the Temporary and Contract market where demand rose

by a very encouraging 8%. The rises in the last two month shows a trend we've seen in previous years where the temp market rises in the second half of the year. While at 166.93 the Index is still just short of the peak set in February demand is 28.2% higher than this time last year and it looks certain to rise further over the months ahead.

The Permanent market however slipped, falling 1.8% from the record high set in June. This market is nowhere as dynamic, nor volatile for that matter, than the temporary and contract market but its still 15.5% higher than a year ago, great news for job seekers.

CUSTOMS AND SAFETY – STREAMLINED ACROSS THE TASMAN

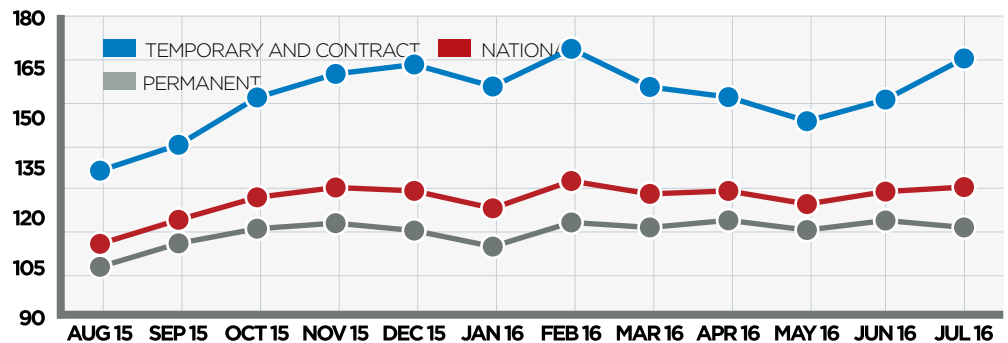
Impex and Labourforce have nearly 20 years of servicing the Supply Chain Industry. We work with stakeholders to ensure efficiency in the sector. We strongly believe a safety focussed and efficient supply chain sector gives Australia and New Zealand a competitive edge.

We have employed in-house occupational nurses at all of our branches to ensure comprehensive drug and alcohol testing, workplace tailored pre-employment medical testing and wholly compliant health and safety checks for all of our employees and staff, before they are allowed to step foot in your workplace.

We congratulate the NZ and Australian Governments for improving and streamlining the ATT programme and applaud Worksafe NZ for the new focus on a safer workplace.



CHART 1 NATIONAL INDEX AND JOB TYPE ANALYSIS



STATE ANALYSIS

NSW powers to new record. Welcome relief in WA

The most significant development in July from a state perspective was the 3.8% growth seen in Western Australia. It's been a dismal run in WA for much of 2016 with demand hitting a record low in June. So this rise will come as a welcome relief for job seekers in WA. Whilst it's too early to herald a sustained positive trend it is finally a move in the right direction.

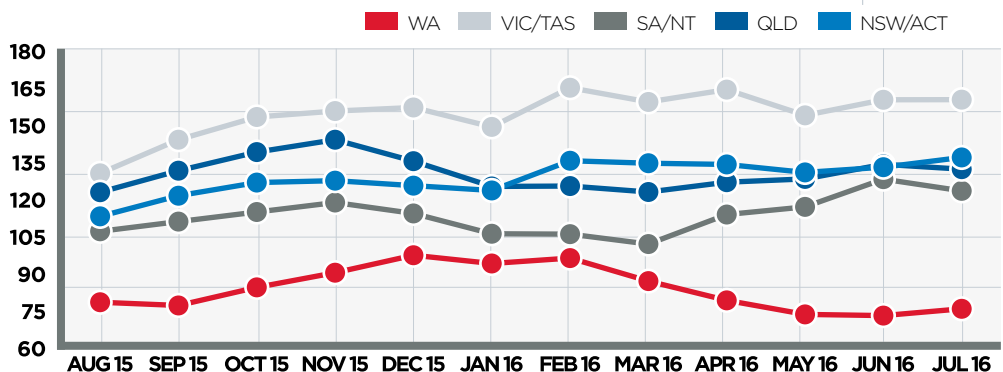
By way of contrast Queensland experienced 1.5% decline in job opportunities bringing to

an end four successive months of growth.

New South Wales grew by a further 3% in July raising its Index to 136.06, a new record. This eclipses the previous record set in February. Advertised job vacancies are now a whopping 27.6% higher than twelve months ago.

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

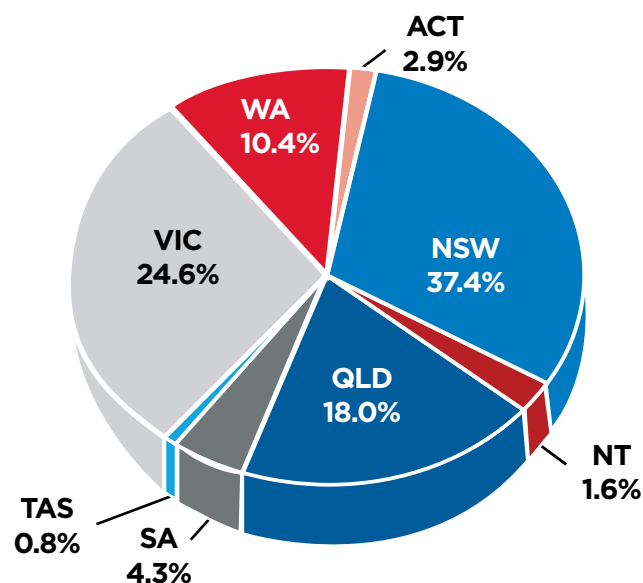
CHART 2 COMPARISON OF STATE JOB INDICES



AUGUST 2016

CHART 3
ANALYSIS OF JOB
ADVERTISEMENTS BY STATE
AND TERRITORY JULY 2016

As NSW now represents 37.4% of the market its strong performance is critical from an overall national perspective. WA's bounce in July was good for the state but, at only a 10.4% share is less significant.



OCCUPATIONAL ANALYSIS

Storepersons and freight handlers continue to drive demand

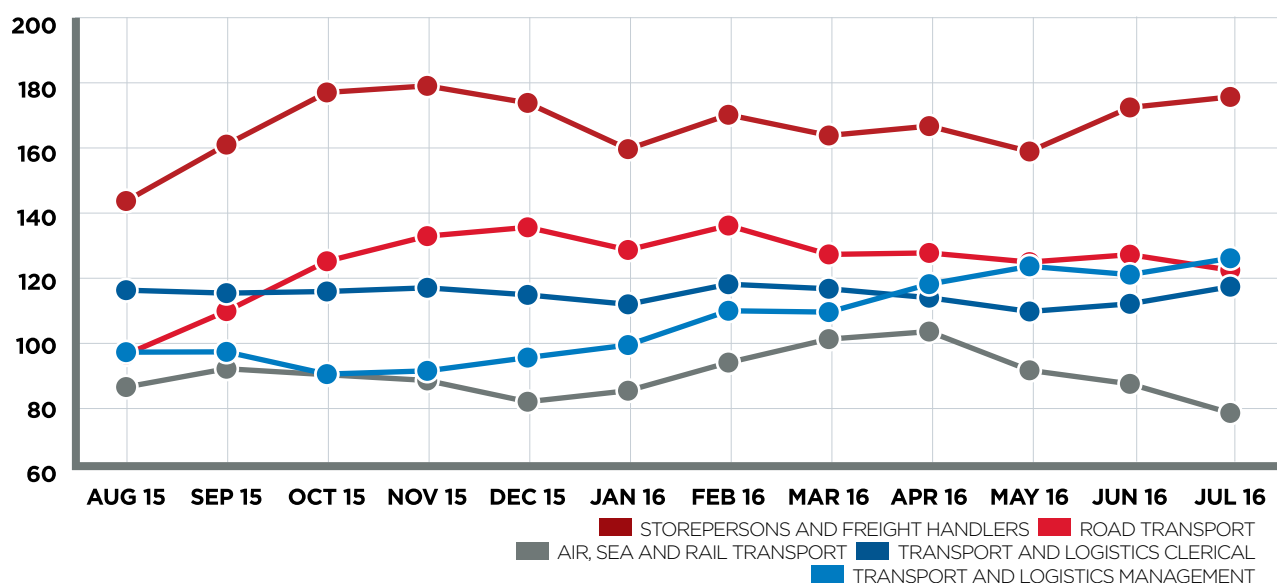
The recent strong pickup in demand has once more been driven by increased demand for Storepersons and Freight Handlers. It rose 1.9% in July and 5.5% for the last quarter. Job opportunities are 30.8% higher than this time last year and, with an index soaring at 175.28 look to exceed the record set last September.

Demand for TL&SC Management has picked up again after faltering in June. It rose 4.3% taking the Index to 124.90, its highest point ever, eclipsing the previous record set back in December 2014. Demand for management level professionals has been on a very strong positive trajectory all year, welcome news for

those looking for senior appointments in the industry.

Ironically the picture for TL&SC Clerical is far less rosy. Demand did rise 4.8% in July on top of a 2.2% rise in June. But demand has been muted all year, rising just 4.5% in twelve months.

CHART 4 ANALYSIS OF JOB ADVERTISEMENTS BY SPECIALIST OCCUPATION



INDUSTRY ANALYSIS

Volatile Professional, Scientific and Technical upside surprise

Transport and Logistic employers have been the driving force behind the positive market sentiment. While demand has risen 40.8% in the last 12 months it actually slipped by 2.3% in July. Likewise Manufacturing that has grown by 40% over the last year fell by 2.9% in July.

The surprise package in July was Professional, Scientific and Technical which has again risen substantially. However it is not a big employer of TL&SC staff so low data does create volatility and these increases really only take the market back up to the level seen at the beginning of the year.

There was also an encouraging growth amongst Mining, Utilities and Construction employers. Demand rose 7% and is up 18.6% compared to July 2015. The Index still wallows down at 89.86 but is the strongest since February and well above the low point mid last year.

CHART 5 ANALYSIS OF JOB ADVERTISEMENTS BY INDUSTRY

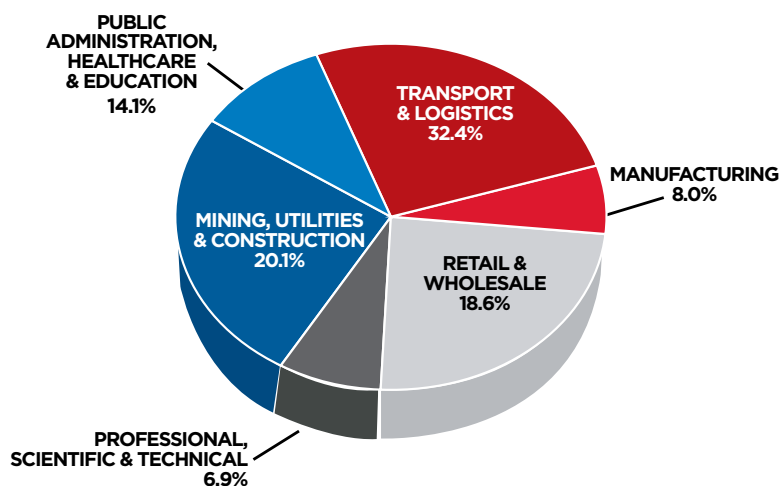
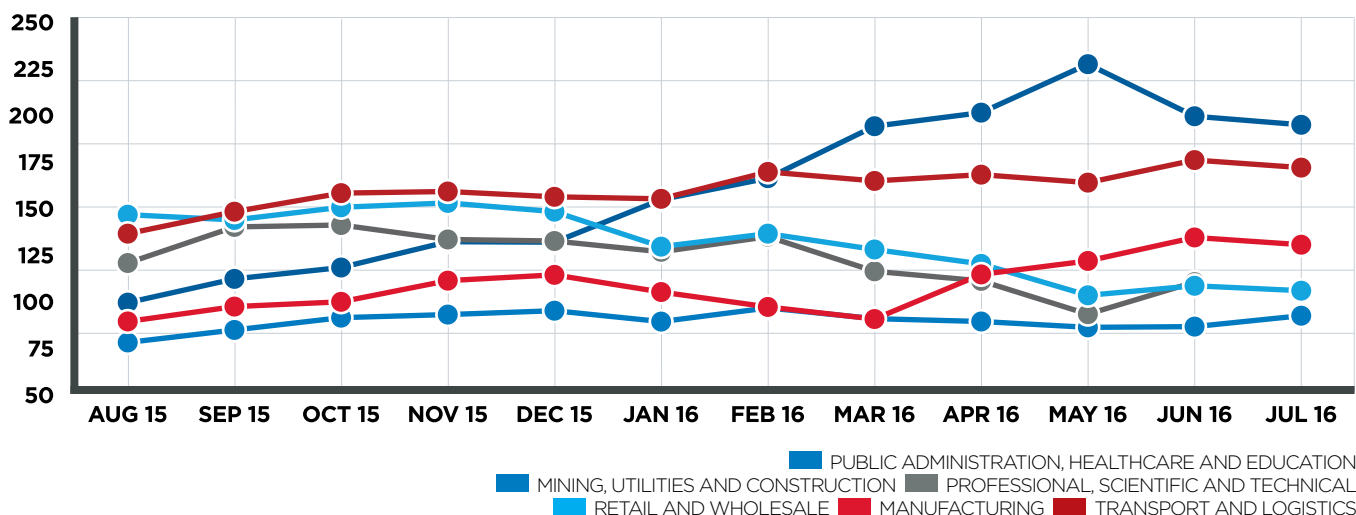


CHART 6 THE PROPORTION OF JOB ADVERTISEMENTS BY INDUSTRY JULY 2016

The pickup in the Mining Utilities and Construction is important to the overall picture. It now represents 20.1% of vacancies. Weakness in the sector is the only area to have restricted growth over the last two years.

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

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