

Transport, Logistics & Supply Chain Job Index

REPORT

KEY FINDINGS

- ⚙️ The Labourforce Impex Transport, Logistics and Supply Chain Job Index rose 3.3% in August
- ⚙️ The Index now sits at 111.27 and likely to rise further as seasonal demand picks up
- ⚙️ For once permanent vacancies were the stronger with a 3.8% rise, temporary just 2.3%
- ⚙️ NSW and Victoria both improved substantially mirroring broader economic improvements
- ⚙️ WA has now fallen 30.1% in 12 months, dragged down by the Mining and Resources sector
- ⚙️ Demand for Store Persons and Freight Handlers is up 6.4%, the index at a new record high of 142.78
- ⚙️ The gap between demand for clerical over management opportunities widened further. Clerical now sits at 114.94 and Management at 95.59
- ⚙️ Transport and Logistics employers were extremely active in August with demand rising a massive 11.3%
- ⚙️ Despite further falls in the A\$, Manufacturing saw a further decline in vacancies - off 5.1% in August

SAFETY SEPTEMBER

LabourHealth will have an exhibit at the **Safety in Action Melbourne** from 15 - 17 September. By attending you are taking a major step towards keeping your business safe.



We will be having our very popular "beer goggles" driving simulator. Come along and test your skills on our state of the art driving simulator – and then try it again with the "beer goggles" on to see the effects of drugs and alcohol will have on your skills. For any company who wants easy to access, quality, workforce drug and alcohol testing, LabourHealth is the best because it provides:

- ▶ **No hassle testing**
- ▶ **Quality service**
- ▶ **Workplace experience**

We have conducted drug and alcohol testing directly to workforces Australia-wide since 1998. During this period we have undertaken over 200,000 tests and have witnessed an alarming growth of drug and alcohol abuse in the workplace.

Earlier this month we were at the Sharks home game against Manly. We partner with the Sharks NRL team because we want to put workplace safety into the big league. We were able to promote safety at the game with a special focus on workplace safety.



NATIONAL JOB INDEX

Solid 3.3% August increase welcome

The Labourforce/Impex Transport Logistics and Supply Chain Job Index enjoyed a solid 3.3% increase in August unwinding the small fall sustained in July. The Index rose from 107.67 to 111.27.

The market has been fairly subdued for the last three months, actually falling 5.4% but, whilst still well short of the record set in October 2014, once again

showing signs of growth in the second half of the year. Over the past 12 months the market has risen 4.1%. This should rise in the months ahead if this new momentum can be sustained.

For once permanent vacancies were the stronger, rising 3.8% in the month. They are however, still down 10.0% over the last six months. The Index sits at 104.37

so still above its base period.

The Temporary and Contract Index also rose but by only 2.3%. The Index rose from 130.25 to 133.24. Job volumes have risen 8.4% in the last six months and 17.2% in the last year so, with the seasonal pick up yet to take hold we should see the Index rise further in the second half of the year.

SAFETY SEPTEMBER

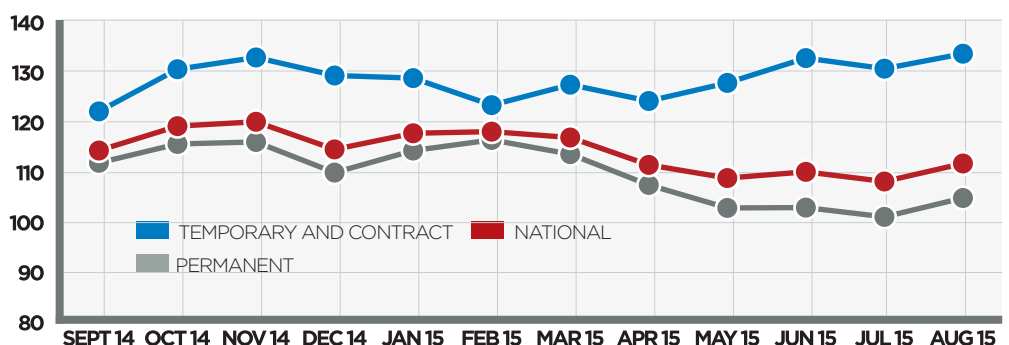
LabourHealth has a strong focus on workplace safety as Spring begins. We will again promote the effects of drug and alcohol can have on individuals with our simulators at Safety in Action Melbourne, and we took the important safety message to NRL fans at the Sharks special safety promotion game with our partners Cronulla Sharks.

We want to partner with you to make sure that drug and alcohol testing is hassle free, a quality and independent service, developed over our fifteen years of workplace experience. For all of your workplace drug and alcohol testing questions, give me a call today or go to www.labourhealth.com.au



Regan Brown
CEO
LABOURFORCE

CHART 1 NATIONAL INDEX AND JOB TYPE ANALYSIS



STATE ANALYSIS

NSW and Victoria powerhouses for growth

The national jobs growth in August were primarily shared between New South Wales – up 5.3%, and Victoria, up a very robust 9.3%.

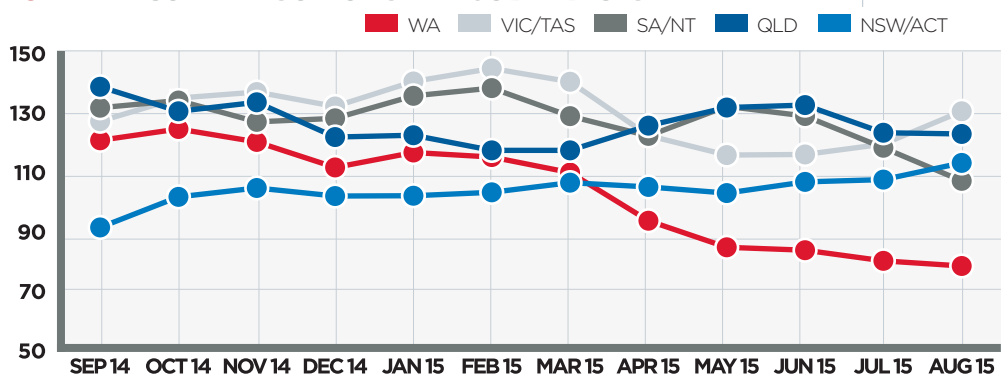
These results are consistent report by the ANZ Economics team highlighting NSW and VIC as the powerhouses once more for growth, replacing WA. Where the trends differ are in that NSW has grown consistently over the past 12 months, up 28.3%, 10.4% in the last six months while Victoria has been quite slow in 2015, falling

10.0% in six months but now bouncing back closer to its peak.

Western Australia's parlous state – down a further 2.2% to 77.58, also resonates with the ANZ research and many other sources. Its Index has fallen 30.1% in 12 months. The Transport sector has been affected both directly and indirectly by the downturn in the resources sector.

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

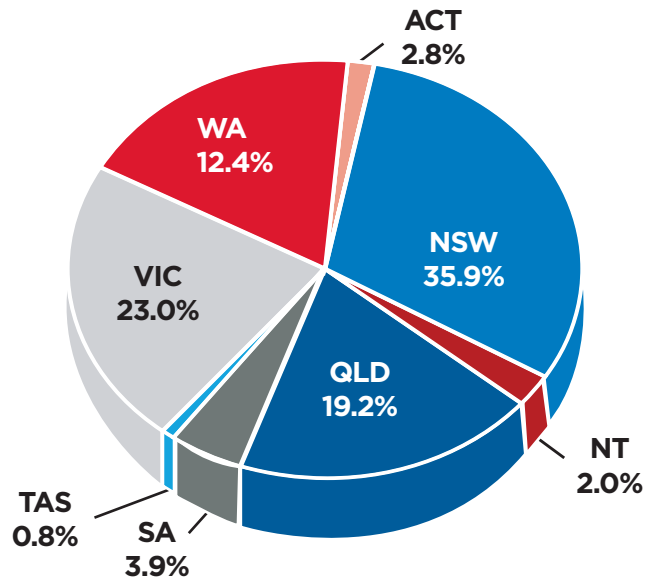
CHART 2 COMPARISON OF STATE JOB INDICES



SEPTEMBER 2015

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

Western Australia's decline has seen its share of the national job vacancy count slip from 18.4% to just 12.4% this month. NSW's domination grew once more now representing a 35.9% share, its largest since my 2014.



OCCUPATIONAL ANALYSIS

Surge in demand for Store Persons and Freight Handlers

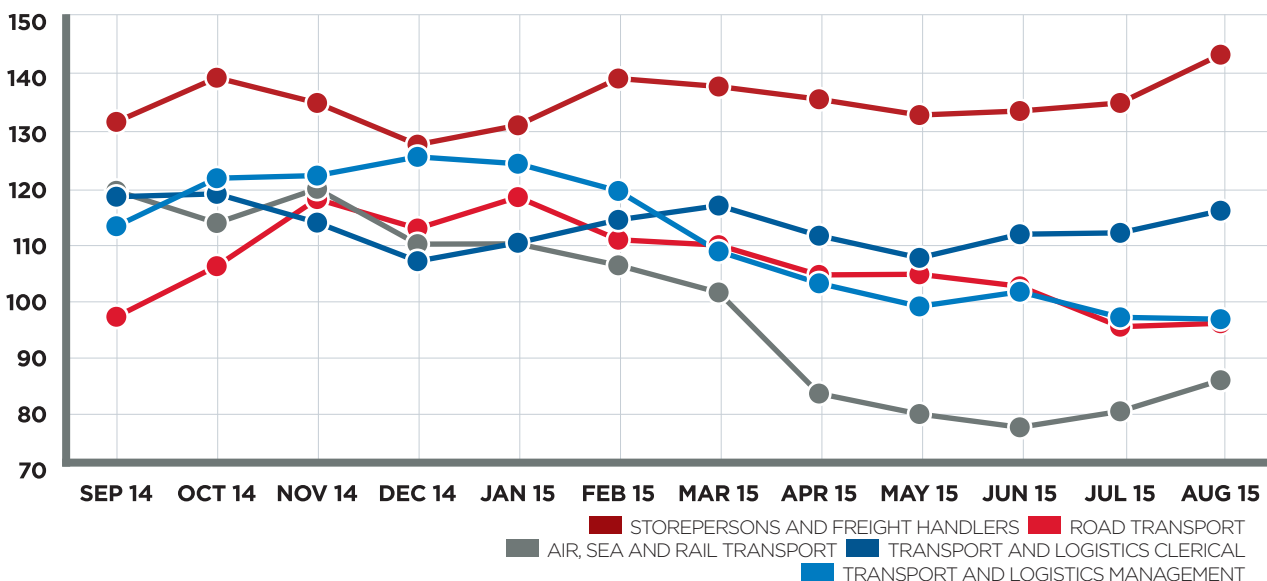
August saw surges in demand for Store Persons and Freight Handlers, up 6.4% and Air Sea and Rail Transport up again, this time by 7.0%. The former index is on a new record high of 142.78. It is this time of year when demand for Stores and Freight Handlers to pick up seasonally so this area looks particularly promising.

Only demand for Transport, Logistics and Supply Chain Management fell in August, by just 0.45%. But with demand for TLSC Clerical vacancies rising 3.4% the gap between

demand for clerical over management opportunities widened further. Their respective indices were close back in March but Clerical now sits at 114.94 and Management at 95.59, its lowest point since February 2014.

Demand for transport professionals across air, sea and rail experienced a rare rise, picking up 3.7%. Demand is still down 27.4% over the past six months so hopefully this month may herald a change in fortune.

CHART 4 ANALYSIS OF JOB ADVERTISEMENTS BY SPECIALIST OCCUPATION



INDUSTRY ANALYSIS

Transport & Logistics 11.3% boost. Manufacturing surprising decline

Transport and Logistics employers were extremely active in August with demand rising a massive 11.3%. This is its first rise since February. The Index now sits at 133.87, not a record but not far off. A build up in temporary demand leading up to Christmas will hopefully see

demand rise further.

Manufacturing saw a further decline in vacancies – off 5.1% in August. Demand has fallen 21.3% in the last quarter, hard to explain given the decline in the A\$ and anticipated improvements in export sales.

Demand in Mining, Utilities and Construction fell 0.4%, its best month for some time. The trend continues down but with just a 2.2% fall in the quarter against a 17.6% fall over twelve months hopefully demand is holding steady.

CHART 5 ANALYSIS OF JOB ADVERTISEMENTS BY INDUSTRY

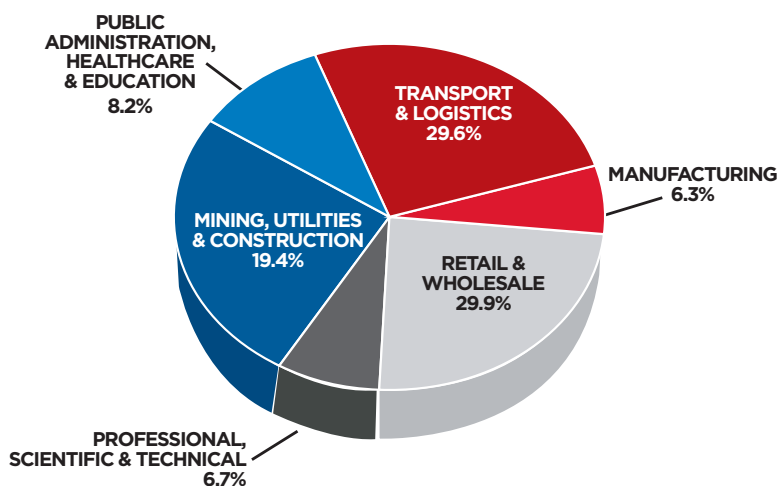
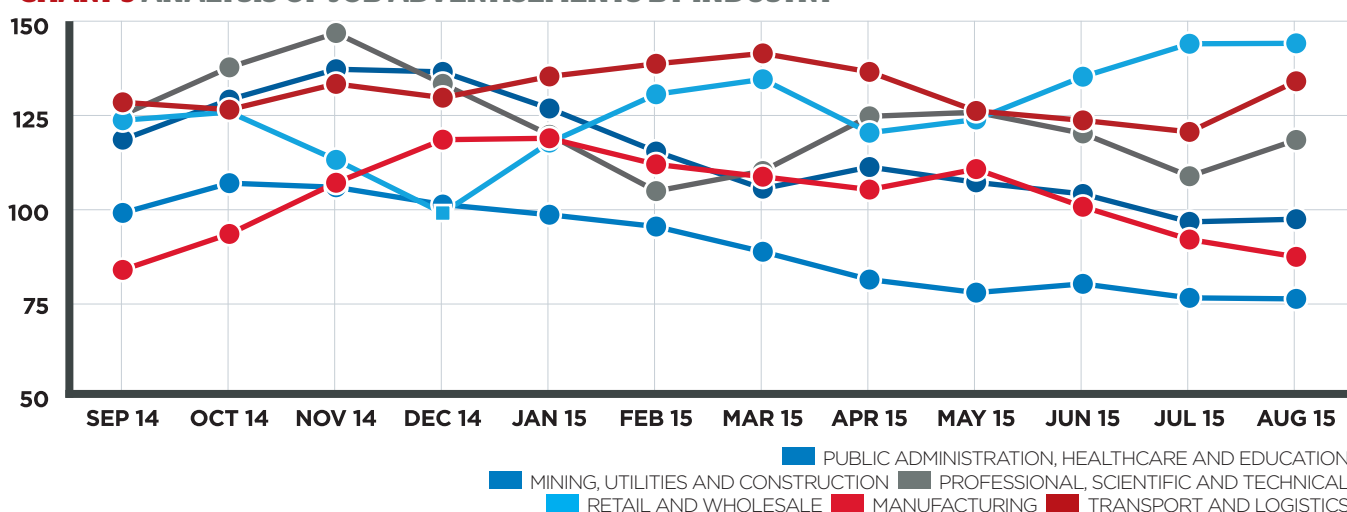


CHART 6 THE PROPORTION OF JOB ADVERTISEMENTS BY INDUSTRY AUGUST 2015

Retail and Wholesale and Transport and Logistic employers now hold a similar share of the market – both just short of 30%. What is most encouraging is that these two categories are also the fastest growing.

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.

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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