

Transport, Logistics & Supply Chain Job Index

REPORT

KEY FINDINGS

- ⚙️ The National Index has risen a further 4.6% in September, 14.7% over 12 months
- ⚙️ TL&SC jobs growth has significantly outperformed the overall Australian market
- ⚙️ Permanent jobs growth of 4.8% edged out Temporary and Contract growth of 4.1%
- ⚙️ All Eastern states have performed strongly, Mining has weighed down WA but SA/NT the weakest performing region
- ⚙️ Stores and Freight Handling roles grew a staggering 8.6% in September and are 47% up over twelve months
- ⚙️ At 86.27 only TL&SC Management positions sit below the 100 benchmark established a year ago
- ⚙️ Transport and Logistic employers have increased their job advertising volumes by 25% over the past year
- ⚙️ The bulk of the growth has been in Temporary roles, up 28%, but Permanent opportunities have also grown by 11%

PREPARE NOW FOR YOUR CHRISTMAS LABOUR NEEDS

Labourforce continues to serve our clients with innovation and targeted responses to meet their service needs.

We are delighted to work with one of our major clients to bring them 100 new employees via a Limited Tenure Contract. This means they will have skilled, reliable and motivated staff to ensure they meet their warehousing requirements now and into the future. It also means they get the most competitive rates, without sacrificing flexibility and the **Labourforce** guarantee of pre-employment medical and Drug & Alcohol testing.

In the lead up to Christmas, we are anticipating a lift in the supply chain and logistics sector. As consumer trends grow the online and delivery market, we are expecting warehousing and transport sectors to grow. If you are anticipating an increase or require flexibility as we head into the end of the year, now is the right time to talk to us about how we can help.

ImpEx Personnel are proud to continue our partnership with CBFCA as the platinum sponsor for the 2014 National Conference. We hope to see you at the event on the Gold Coast at the end of the month.

LabourHealth continues to provide our occupational nurses, physiotherapists and accredited drug and alcohol testing capabilities at your workplace. By coming to you, we keep the costs down whilst ensuring compliance. Our custom built trailers also conduct personal hearing assessments and noise compliance at your workplace.



NATIONAL JOB INDEX

Another month of impressive growth

The Transport Logistics and Supply Chain employment market enjoyed another impressive month of growth with the Labourforce Impex Job Index rising 4.6% to 114.66 in September. To put this in perspective the ANZ Bank recently reported that their Job Advertisement Series had risen for the last four months, 7.6% in the last twelve month. Our TL&SC Job Index has risen 14.7% over the same period and by 7.3% in the last three months alone. **This is encouraging news for those working for the airlines or Australia Post whose jobs may be under threat.**

For once the Permanent Job Index increase of 4.8% (narrowly)

outperformed the 4.1% rise in Temporary and Contract opportunities. The Permanent Job Index now sits at 110.92, a rise of nearly 11% in a year. The Temporary and Contract market has performed even stronger, rising 28% to 128.05 over twelve months.

The Transport, Logistics and Supply Chain sector continues to outperform the overall Australian employment market. Just as we reported last month that economists are starting to dampen their forecasts for 2015 the Economists at the ANZ are becoming more bullish on employment, suggesting that unemployment will fall below 6% in the medium term.

We provide reliable and affordable workplace solutions for your company.

The Labourforce group of companies includes LabourHealth and ImpEx personnel.

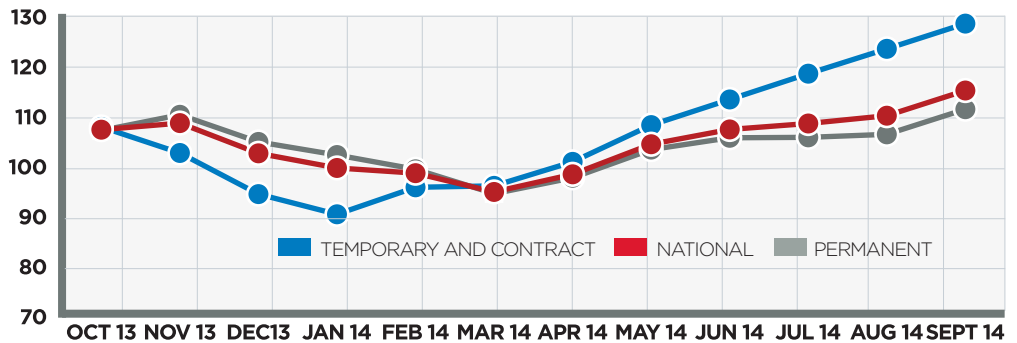
They support the transport, logistics and supply chain sectors with reliable, safe and affordable solutions for permanent, temporary and contract workforce.

All three companies in the group work around the clock, 24/7 because that's when our clients work.

Regan Brown

Regan Brown
MANAGING DIRECTOR
LABOURFORCE

CHART 1 NATIONAL INDEX AND JOB TYPE ANALYSIS



STATE ANALYSIS

Strong growth in Eastern states. Victoria spectacular

All states and sectors enjoyed an increase in the number of job vacancies advertised in September. These ranged from a massive 6.4% in Victoria and 5.8% in Queensland to 1.6% in Western Australia and 2.1% in SA/NT. The latter two states are the laggards. Over a 12-month period WA vacancies have fallen 15.5% while SA/NT have fallen exactly 25%. Having said that, as the graph clearly shows, both have at least recovered some ground in the last six months after weak Q1 2014.

Things are going much better in the Eastern states. Victoria's performance has been spectacular, growing 47% in 12 months to 147.05. NSW, with growth of 10.5% and Queensland 19.4% have both performed very strongly and seem to be pulling ahead again after a relatively quiet mid year period.

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

CHART 2 COMPARISON OF STATE JOB INDICES

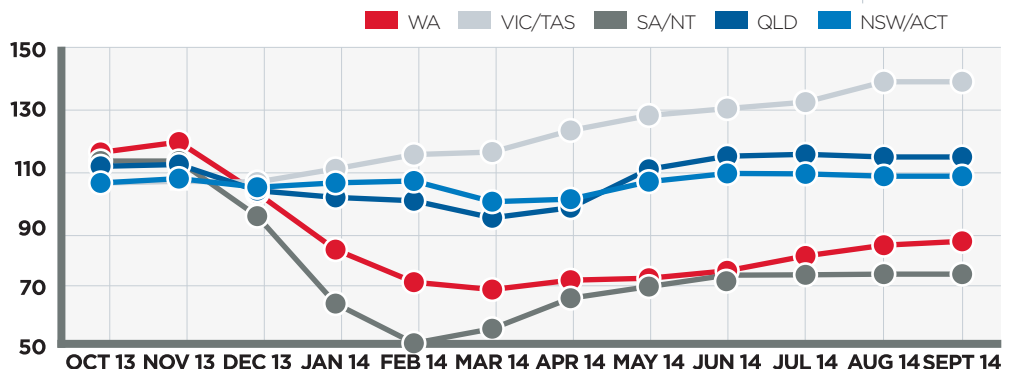
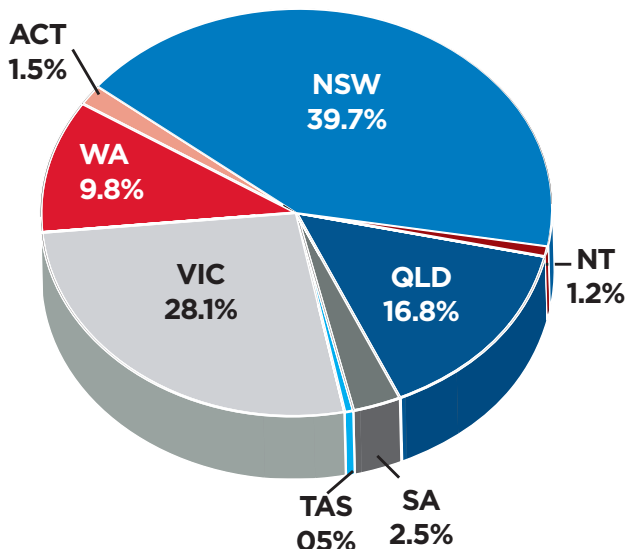


CHART 3
ANALYSIS OF JOB ADVERTISEMENTS BY STATE AND TERRITORY SEPTEMBER 2014

Yet again Victoria is the big winner with its share now at 28.1% reflecting the state's strong growth in employment opportunities in Transport, Logistics and Supply Chain in the state over the past year. Its share 12 months ago was 22.9%. For the first time WA's share has fallen below 10%. A year ago it held 14.3% and is now only 9.8%.



OCCUPATIONAL ANALYSIS

11% boost for Air, Sea and Rail Transport

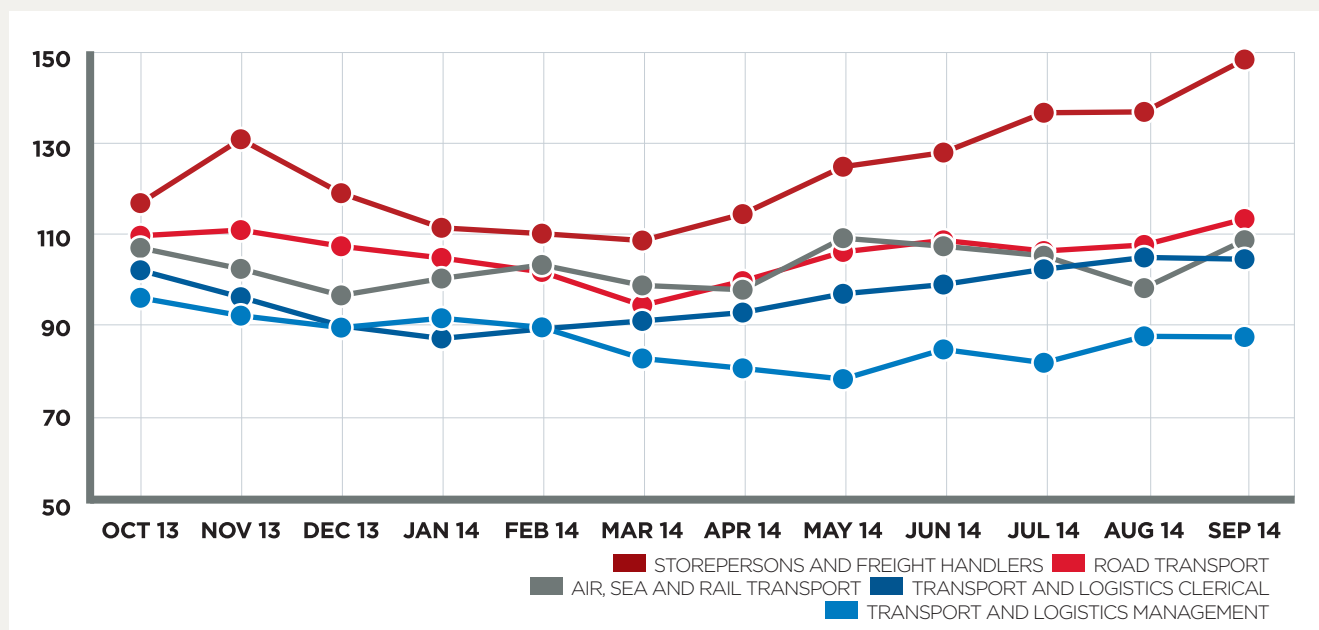
In September Air, Sea and Rail Transport job advertising volumes back flipped! The 11% rise wiping out the 5.8% fall the previous month. Other occupations were more stable. TL&SC clerical and managerial roles both flat lined in September but there was healthy growth in job opportunities for road transport workers and particularly Storepersons and Freight Handlers, climbing another 8.6% after a more subdued August.

We now have accumulated twelve months of data and can

see clearer medium trends appearing. The most obvious of these is the phenomenal growth in Stores and Freight roles. Very many of these roles are temporary and casual in nature but nonetheless still very impressive.

Only TL&SC Management job advertising volumes are below the 100 benchmark set last September. The Index sits at 86.27, a 13.7% fall in vacancies over twelve months. By way of comparison Clerical roles have grown 3.6% in twelve months.

CHART 4 ANALYSIS OF JOB ADVERTISEMENTS BY SPECIALIST OCCUPATION



INDUSTRY ANALYSIS

Retail and Wholesale - up nearly 25% in 6 months

The pickup in demand amongst Retail and Wholesale employers from the low in April continues with no sign of stopping. The Index has risen 24.8% in the last six months. Ironically the Index now is just back to 101.34 so this may well represent a seasonal pattern of, as reported above, largely temporary and casual stores and freight staff building.

Interestingly a not dissimilar pattern can also be seen in Public Admin, Health and Education but the trend is more based upon budgetary cut backs than seasonal downturns. Three industries have enjoyed a very positive twelve months and their indices are

broadly aligned. These are Transport and Logistics, Professional, Scientific and Technical and, more surprisingly Manufacturing. All indices hover around the 125.0 mark. Given the structural issues facing the manufacturing sector it is hard to explain the rise in demand in Manufacturing. The growth, however, amongst Transport and Logistics companies is great news for the sector.

Even the Mining, Utilities and Construction sectors still, at 107.09, sit above the 100 benchmark established twelve months ago reflecting the balance between Mining weakness and strength in the Construction sector.

CHART 5 ANALYSIS OF JOB ADVERTISEMENTS BY INDUSTRY

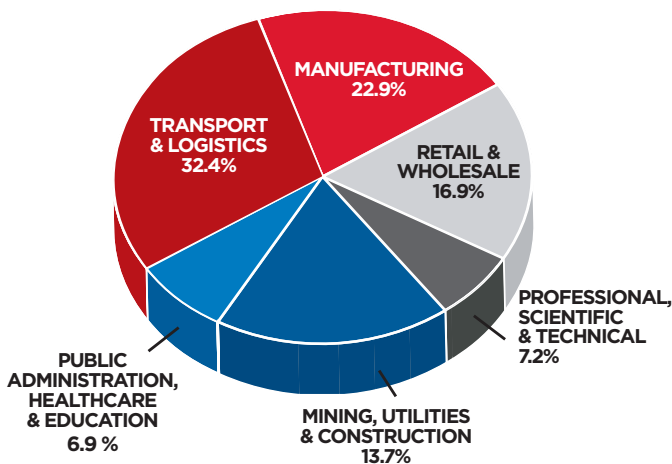
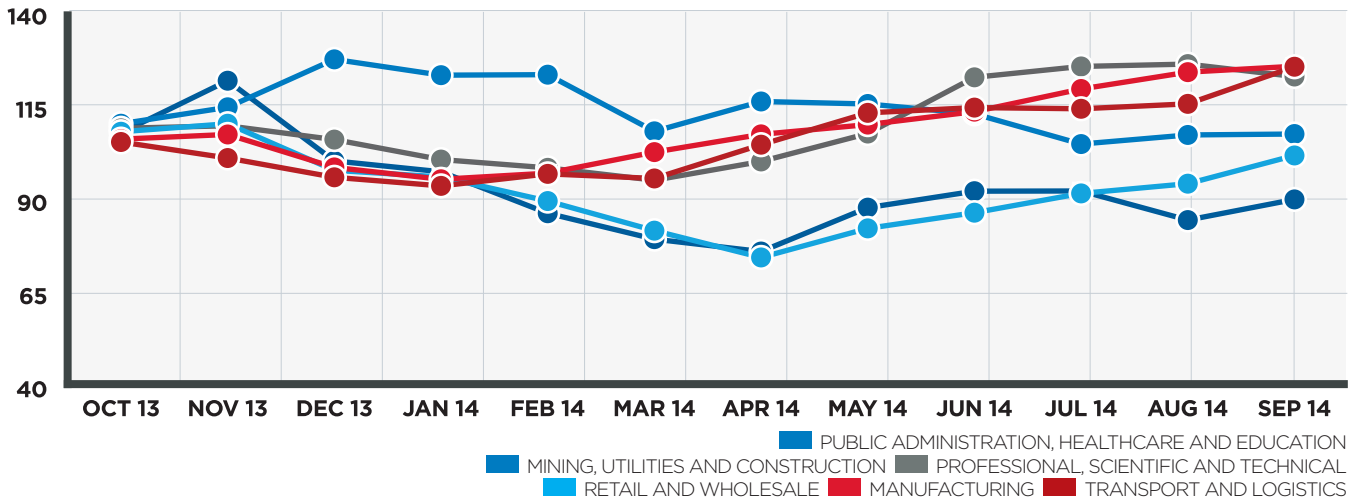


CHART 6 THE PROPORTION OF JOB ADVERTISEMENTS BY INDUSTRY SEPTEMBER 2014

With twelve months of data now accumulated the principal trend has been for Transport and Logistics employers and Manufacturing employers to represent an increasing proportion of the national market. Their respective shares have grown 1.9% and 1.5% from a year ago, largely at the expense of Mining, Utilities and Construction which has fallen 2.4% from a 16.1% share last September.

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

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