

Transport, Logistics & Supply Chain Job Index

REPORT

KEY FINDINGS

- ⚙️ The Labourforce / Impex TL&SC Job Index rose a very robust 3.8% in September, its fourth consecutive monthly rise
- ⚙️ The overall market, the Temporary and Contract and Permanent job markets all hit new record highs
- ⚙️ Job opportunities are 13.1% greater than this time last year, suggesting increased competition for top talent
- ⚙️ Both WA and Queensland saw healthy growth in September reflecting improvements in the Mining and Resources sector
- ⚙️ Victoria and NSW also hit new record highs in job opportunities in September
- ⚙️ Demand for Road Transport staff rose 4.6% as demand heats up for the busy Christmas season
- ⚙️ Both TL&SC Management and Clerical enjoyed healthy growth in job vacancies
- ⚙️ Not surprisingly it was Retail and Wholesale that drove growth, rising 6.2% in September with the prospect of further improvement in the months ahead

NSW IN THE BLACK

Congratulations to the Baird Government in NSW for officially ensuring the states place as a powerhouse.



For the First time in history, the state is in a cash-positive position. The \$4.7 billion surplus for 2015-2016 will ensure NSW can get on with building the desperately needed infrastructure to ensure our supply chains can be more efficient and effective.

ROADFREIGHT NSW

Labourforce welcomes the appointment of Simon O'Hara as the General Manager of Road Freight NSW. Peak bodies are the critical link between the regulators and this critical industry. With the infrastructure

plans on foot in NSW, with more to come, it is important that the road freight industry has a clear and influential role to ensure it gets the fair share of infrastructure – where it is needed, how it is needed and when it is needed.

Critical issues such as safety, productivity, compliance and maintenance, speed management, load restraint, fatigue management and driver health and well being are the critical issues for the industry as it continues to grow, in an increasingly crowded city and state.



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SuperStream compliant online service

NATIONAL JOB INDEX

New record highs by every measure

The Labourforce/Impex Transport Logistics and Supply Chain Job Index enjoyed another month of substantial growth. In September job opportunities rose a bullish 3.8%. This is the fourth consecutive rise taking the Index to 134.01, a new record high. This exceeds the previous best of 130.14 set in February this year. Job opportunities in the sector are 13.1% higher than a year ago.

For the first time in quite a while it was the Permanent market that was the stronger performer. It grew by 4.1%, reversing two months of decline. It too is in record breaking territory with the new high of 120.24 exceeding the peak set in April. The Temporary and Contract market still managed growth of 3.1%. Three successive months of growth have seen vacancies

increase 15.1%. This is consistent with seasonal expansion seen in previous years but, because the starting point was higher anyway, also takes the Temporary and Contract Job Index to a new record high of 177.91. This is an exceptional 26.2% higher than this time last year!

This edition has a focus on NSW on our front cover, but we continue to bring you the nationwide statistics that are critical to making better decisions for your business.

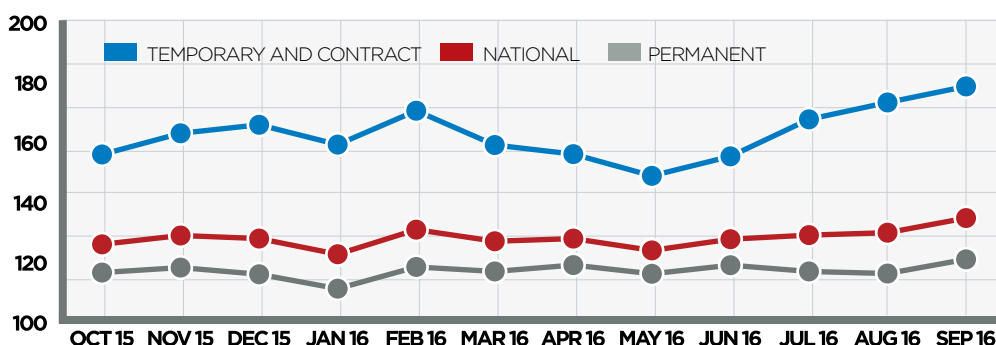
The economic environment is starting to turn around. Finally, Australian businesses are seeing some certainty after a period of caution.

Our job index demonstrates the hiring patterns over the last two years. We have seen that our sector is ready to respond to client demands swiftly.

The shift towards more contingent workforce reflects business needs to be flexible with the way they approach the growth that is coming.



CHART 1 NATIONAL INDEX AND JOB TYPE ANALYSIS



STATE ANALYSIS

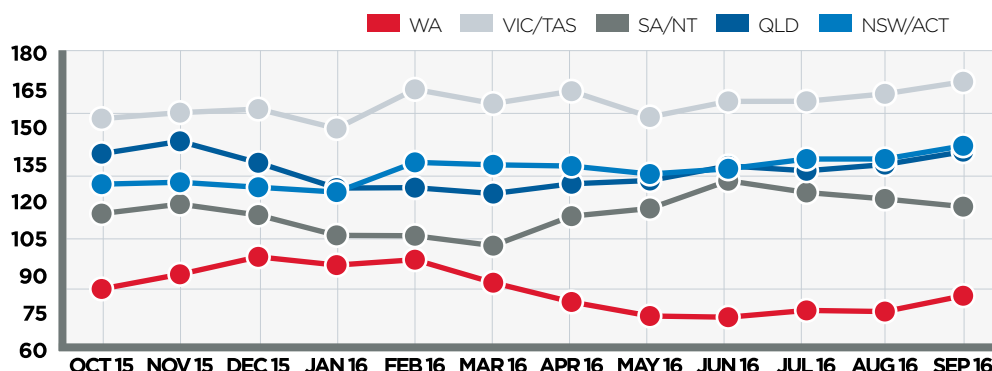
VIC and NSW at record highs. Pick up in QLD and WA

In September all states saw expansion with the exception of SA/NT. The most interesting developments are in the Mining and Resources states. The Queensland market continues to improve. It grew 3.9%, its fifth rise in six months. It's the strongest it's been since counts began in late 2013. WA picked up a very healthy rise of 8.6%. It's off a low base but still only takes vacancies back to a level seen six months ago. These rises are consistent with a broader pick up in WA and Queensland reflecting some improvements in the Mining and Resources sector.

Victoria remains the strongest market. Demand rose a further 3% in September. As predicted last month this now takes the VIC/TAS Job Index to a new record high of 167.27. After little movement in August NSW also ramped up demand in September, rising 3.9%. At 140.40 this also leaves the state at a new record high. Vacancies are 17.3% higher than twelve months ago.

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

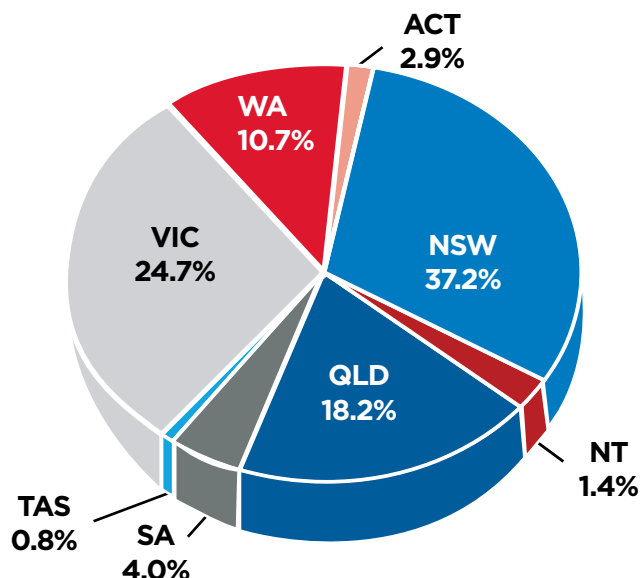
CHART 2 COMPARISON OF STATE JOB INDICES



OCTOBER 2016

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

The encouraging growth in the Mining and Resource rich states has seen WA and Queensland share of all TL&SC job opportunities rising to 28.9%. This is a small improvement on the 28.3% share seen in July but it peaked just shy of 40% back in September 2014 so more improvement is achievable.



OCCUPATIONAL ANALYSIS

Employers chasing talent early for Christmas. Stiff competition

In September the overall national growth was shared across all occupational categories. The most substantial rise was in TL&SC Clerical roles that rose a very encouraging 6.3% after a flat August month. This rise pushes the Index to 122.14, a new record high. All of the growth in the last year was really only seen in the last three months so a longer positive trend is yet to be proven. L&SC Management also picked up another

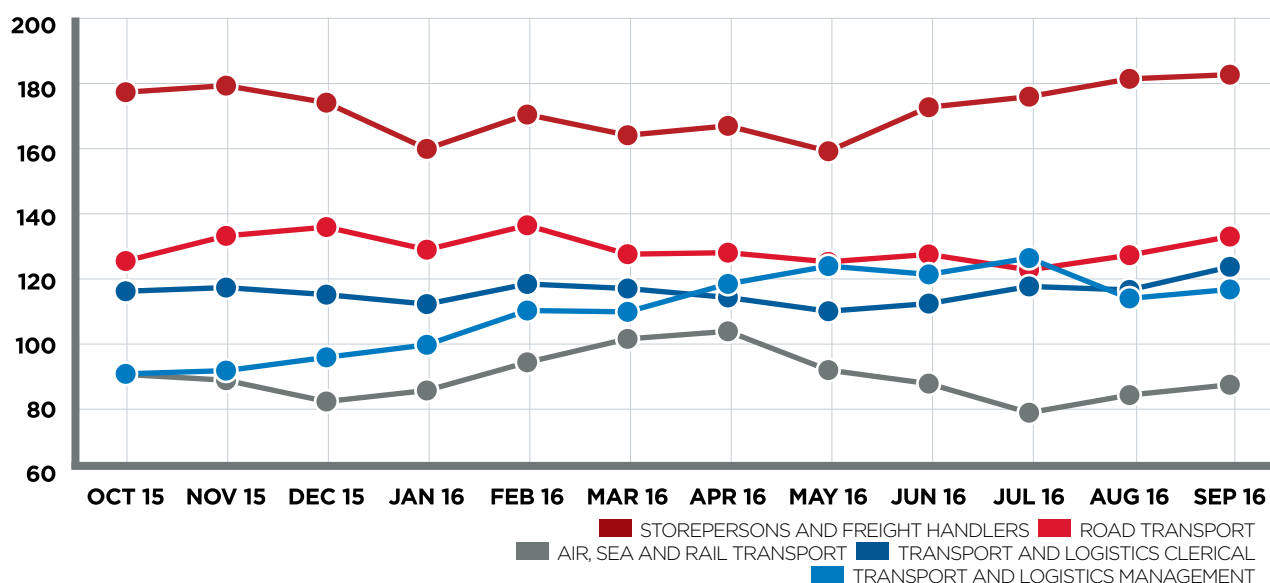
2.5% growth in job opportunities after a lacklustre August.

The big mover in September was Road Transport where job advertisements rose 4.6%. This market has been pretty flat all year but seasonal demand has once more pushed demand to 131.61, the highest level since December last year. It looks as if employers have come to the market earlier this year, possibly a reflection of difficulties experienced

last year in finding casual drivers for the Christmas rush.

The same may have occurred in demand for Storepersons and Freight Handlers. In the three months to August vacancies rose an impressive 14.3%. Demand only rose 0.7% in September when a larger rise might have been expected. Again employers are proactively chasing talent early when faced by stiff competition.

CHART 4 ANALYSIS OF JOB ADVERTISEMENTS BY SPECIALIST OCCUPATION



INDUSTRY ANALYSIS

Despite highs further seasonal pickup expected

Not surprisingly it was Retail and Wholesale employers that were the most active in September. Demand rose a further 6.2%. Demand is again at a historic record high but history also suggests that we will see a further pickup in seasonal demand over the next few months before slowing in the New Year.

By way of comparison demand was relatively flat in Manufacturing, Mining, Utilities and Construction and in Transport and Logistics, all recording small gains. The Public Sector however is showing signs of recovery after a substantial dip in demand in August. It bounced back to show a net growth of 4.6% in the quarter albeit still a shade

lower than the record set in May. Public Administration, Health and Education demand is less affected by seasonal conditions so this reflects an increase in permanent job opportunities.

Note. As a result of retrospective enquiry some of the industry indices from March to August have been restated.

CHART 5 ANALYSIS OF JOB ADVERTISEMENTS BY INDUSTRY

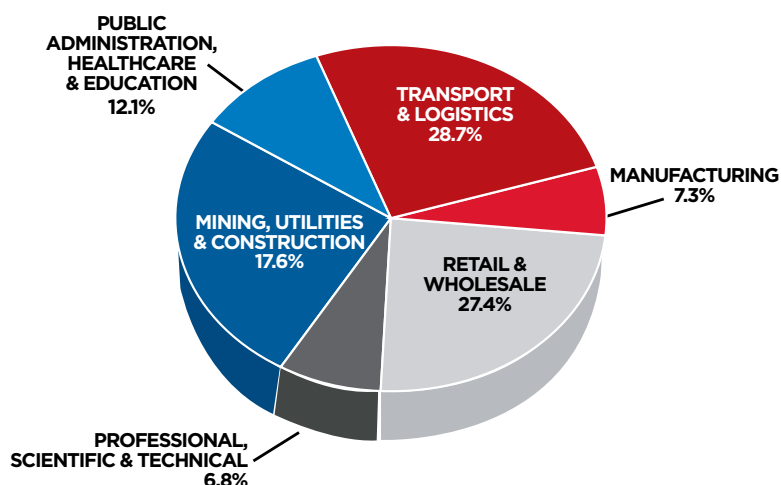
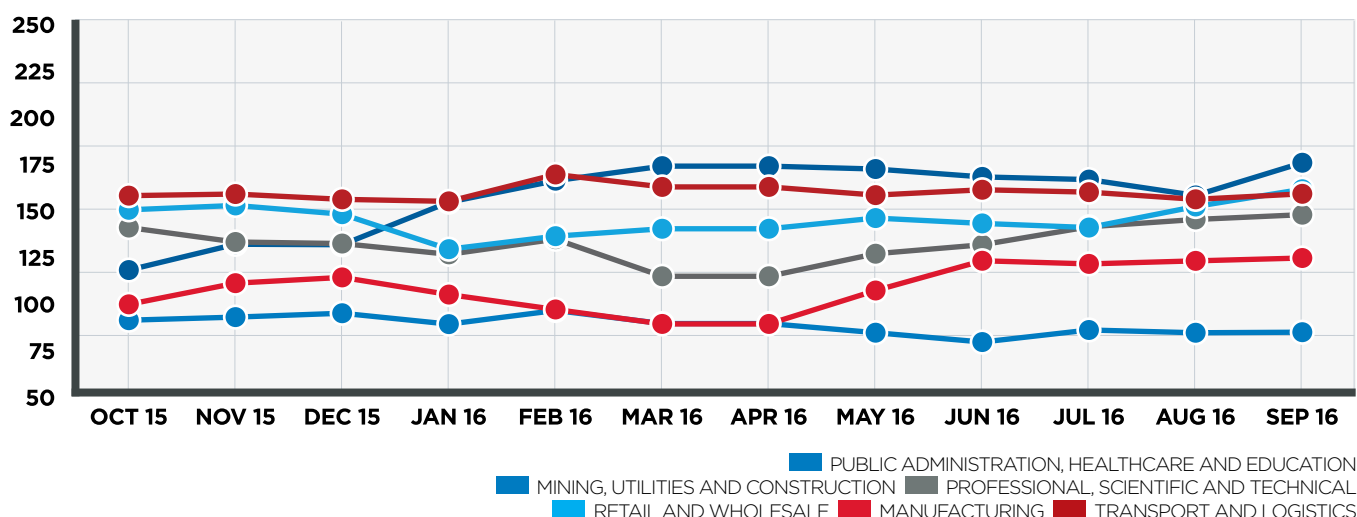


CHART 6 THE PROPORTION OF JOB ADVERTISEMENTS BY INDUSTRY SEPTEMBER 2016

The substantial seasonal rise in jobs advertised by Retail and Wholesale employers has seen their share of the national market shoot up to 27.4%, not far off the proportion held by Transport and Logistics. This proportion should hold up until year end but as temporary and contract job opportunities fall post Christmas the share is likely to retreat again back around the 20% mark.

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