

Transport, Logistics & Supply Chain Job Index

REPORT

KEY FINDINGS

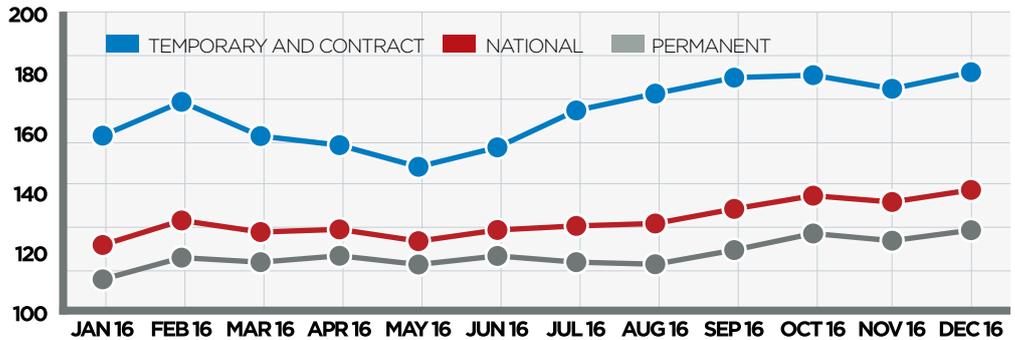
- ⚙️ **The Labourforce / Impex TL&SC Job Index rose 3% from 136.32 to 140.35, a new record high**
- ⚙️ **The national Index has risen in five of the last six months**
- ⚙️ **The Temporary and Contract market defied the normal seasonal trend down by rising 3.2% in December**
- ⚙️ **Likewise permanent job opportunities rose 2.8% in the month and 10.1% year on year**
- ⚙️ **All states and territories rose in December**
- ⚙️ **The most impressive was Queensland which rose 5.7% and achieved a new record high**
- ⚙️ **Job opportunities rose spectacularly for Store Persons and Freight Handlers**
- ⚙️ **The market remains very subdued at the senior level**
- ⚙️ **December saw an inevitable decline in job opportunities in the retail sector but Manufacturing was surprisingly strong**

2016 ended on record high. Up 10% over last 6 months

2016 ended in fine style with the Labourforce/ Impex Transport Logistics and Supply Chain Job Index hitting a new record high. The national Index rose 3% from 136.32 to 140.35. Other than a small fall in November the Index has risen every month in the last six. That's a 10.6% rise over those six months. The normal slowdown in temp and contracting did not occur this year with demand rising 3.2% this December. There was however a small fall in November so advertising

is up just 1.0% in the quarter. The Temporary and Contracting Job Index also hit a new record high of 179.73, up 8.8% for the year. We anticipate a seasonal contraction in early 2017 but the momentum for the New Year is still very positive. Likewise permanent job opportunities rose 2.8% in December. It too hit a new all time high of 126.89. While much lower than temporary and permanent this is still a 10.1% rise over the year, a very strong performance.

CHART 1 NATIONAL INDEX AND JOB TYPE ANALYSIS



All boats rising! Queensland resurgent

All states and territories rose in December. The most impressive was Queensland which rose 5.7% and achieved a new record high of 162.48. A rise of 20.8% over the year is remarkable given how the mining and resources sector has dragged back the Queensland economy. However it may just be that the commodity price led burst of hiring activity in the sector is one reason for Queensland's resurgence. By way of contract NSW/ACT had the weakest month. It rose just 1.2% leaving it 1.7% down for the quarter. The market has plateaued since peaking in November but remains 11.5% higher than last December. VIC/TAS is also below its October

peak but the Index remains the strongest of all regions at 169.79. Given recent trends Queensland looks set to exceed VIC/TAS during 2017. It's been a very mixed year for Western Australia. It was a serious decline earlier in the year, hitting an all time low in June of 72.19 but, backed by improvements in the mining and resources sector, has enjoyed a strong resurgence in the second half of the year. WA has rallied 25.1% in the last six months placing the Index at 90.31, the highest it has been since February 2016. The Index is still down 6.5% year on year but this might have been far worse and the recent momentum is certainly upwards.

CHART 2 COMPARISON OF STATE JOB INDICES

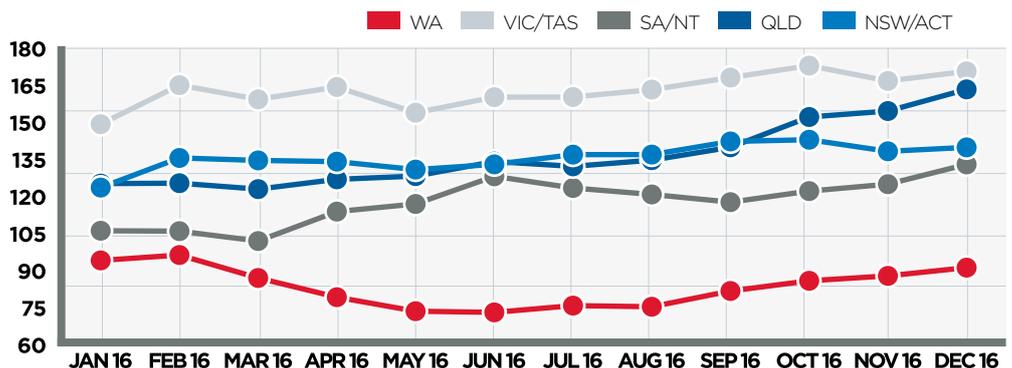
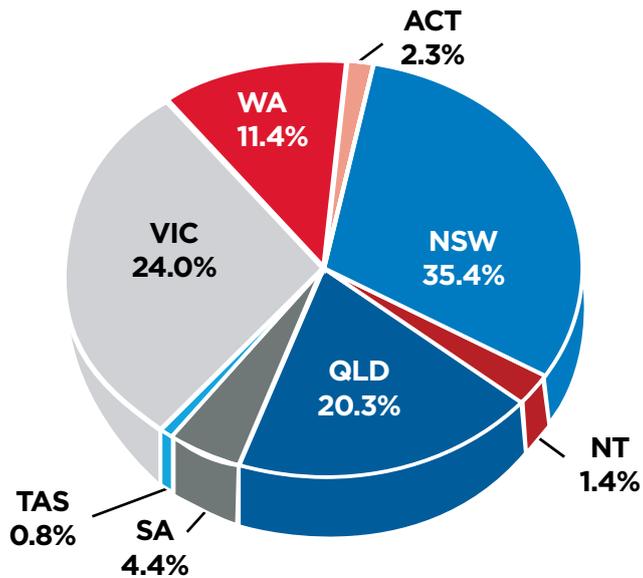


CHART 3
ANALYSIS OF JOB ADVERTISEMENTS BY STATE AND TERRITORY DECEMBER 2016

Queensland strong performance of late has seen its share of job vacancies rise to 20.3%. This is its largest share since June 2015.



OCCUPATIONAL ANALYSIS

Spectacular demand for Store Persons and Freight Handlers

Occupational movement was strange in December. The major occupational categories were very steady other than Store Persons and Freight Handlers where demand rose spectacularly. Demand is up 21.7% for the year and the Index is on 211.12, a massive new record. While

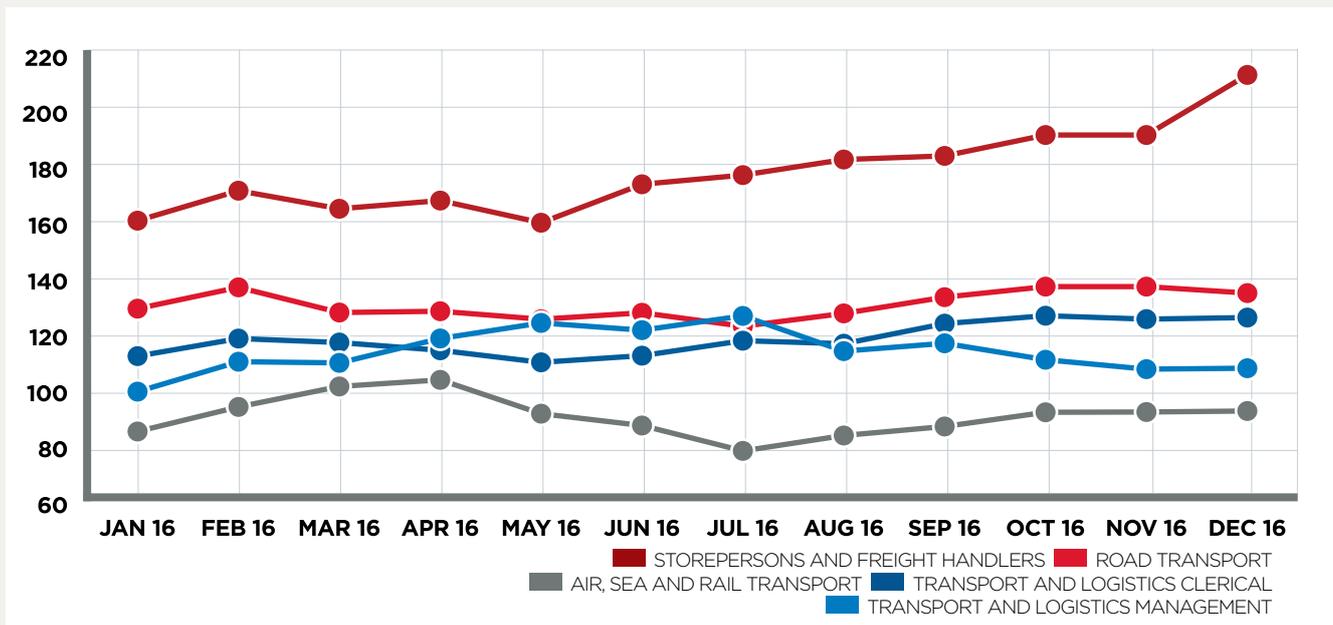
automation may becoming more prevalent in the TL&SC arena it does not seem to be having a negative impact on jobs so far!

Road Transport fell 1.7% in December, broadly in line with what would be expected this time of year. Over the calendar year this is the

only occupational category to have contracted, down 1.1% year on year.

The market remains very subdued at the senior level. TL&SC Management roles did rise just 0.3% but job opportunities are down 11.4% over the last six months.

CHART 4 ANALYSIS OF JOB ADVERTISEMENTS BY SPECIALIST OCCUPATION



INDUSTRY ANALYSIS

Public sector and manufacturing surprise boost

December saw an inevitable decline in job opportunities in the retail sector, down 2.1% for the month and 5.3% for the quarter. We expect demand to follow its normal seasonal pattern and continue to contract in early 2017. Demand is up just 3.4% for the year, well below the national norm,

a reflection of the broader move to online shopping.

Where there has been some surprising growth has been in the manufacturing sector and in the public sector. Public sector (including health and education) demand has grown substantially this year. Manufacturing has also

boomed this year, up 28.8%, an unusual trend considering the generally difficult trading conditions faced by the Australian manufacturing sector.

Chart 6 provides a breakdown of the proportions of each major industrial sector.

CHART 5 ANALYSIS OF JOB ADVERTISEMENTS BY INDUSTRY

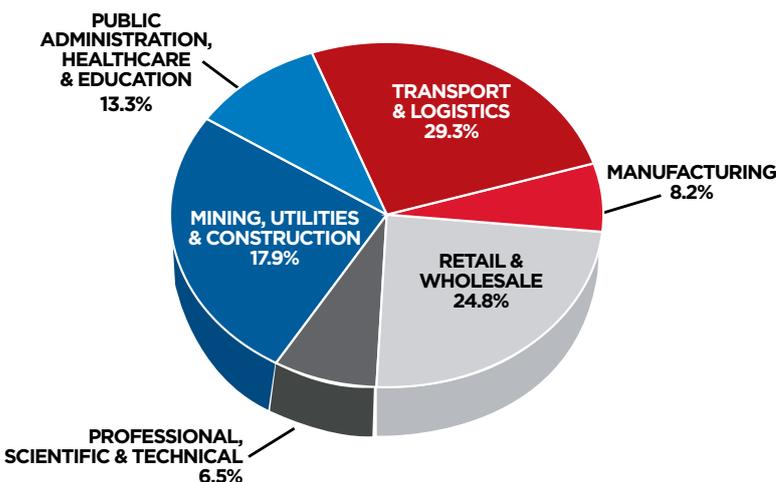
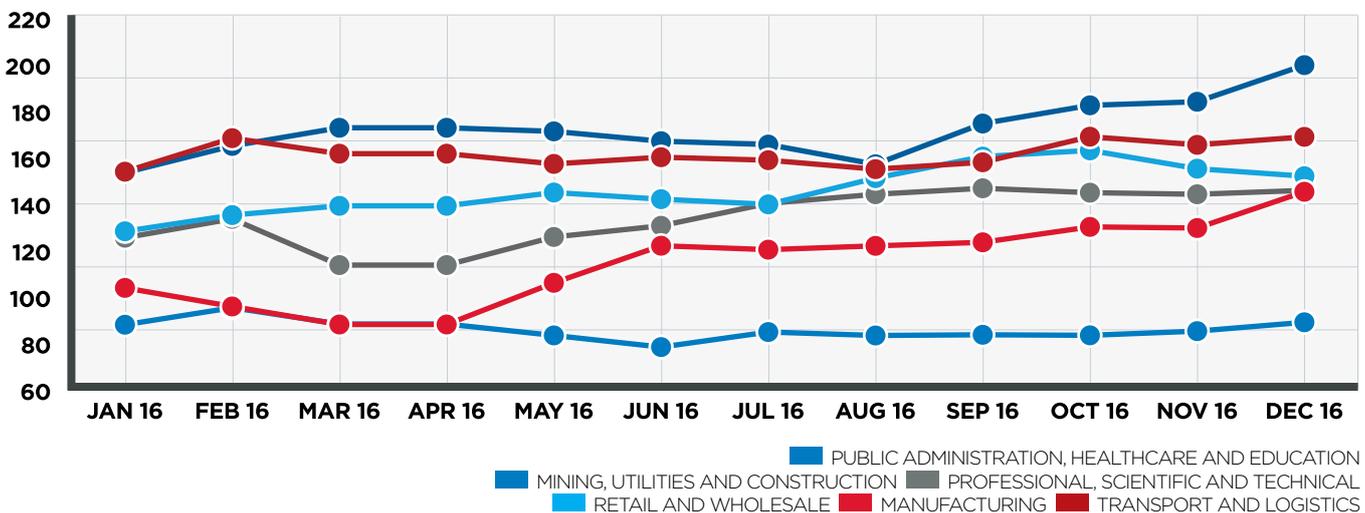


CHART 6 THE PROPORTION OF JOB ADVERTISEMENTS BY INDUSTRY DECEMBER 2016

Over the last 12 months the largest growth in market share has been in Public Admin, Health and Education where the share has risen from 9.5% to 13.5% while Retail and Wholesale has slipped from 26.5% to 24.8%.

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