

# Transport, Logistics & Supply Chain Job Index

# REPORT

## KEY FINDINGS

**The Labourforce / Impex TL&SC Job Index hit a new record high in March**

**Job opportunities rose a further 2.1% during the month**

**Permanent job vacancies have risen 4.9% in the first three months of 2017**

**Temporary and Contract job opportunities also rose by 2.2% but are down over 6% so far this year. This is seasonal rather than structural**

**Vacancies rose 2% in NSW/ACT and by 3.9% in VIC/TAS, also a new record high**

**Management roles have performed particularly strongly in both March and the first quarter**

**Air, Sea and Rail opportunities are showing positive signals and a stagnant 2016**

**Demand amongst Public Sector, Health and Education employers rose a massive 4.1% in March**

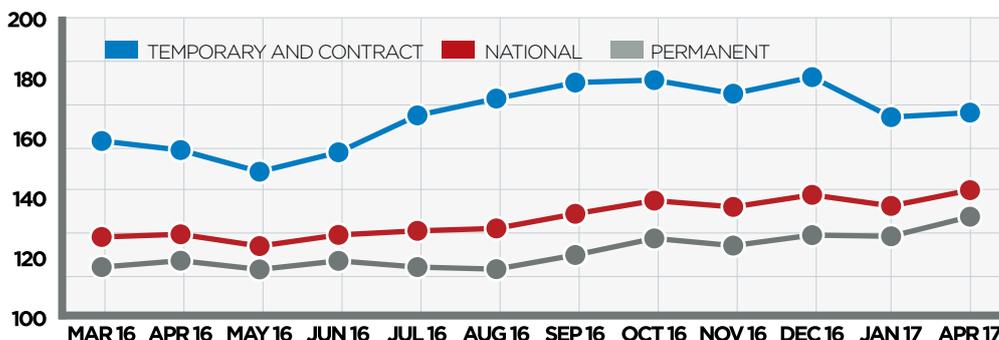
**Transport and Logistics employers increased job orders by 2.9% to a new record high Index**

## Index hits new record high

March saw a new record high for the Labourforce/ Impex Transport Logistics and Supply Chain Job Index. It rose 2.1% to 141.92 eclipsing the previous record of 140.35 set in December. Whilst the rise in the first quarter of 2017 netted off at a mere 1.1% the rise over the last 12 month totals 12.4%. The rise has been steady rather than spectacular with rises in nine out of 12 months. Recent strength has been in permanent job opportunities. They rose 2.1% in March and 4.9% already in just the first three

months of 2017. Over the last year vacancies are up a very bullish 14.5% leaving the Permanent Job Index at 133.05, a new record level. Temporary and Contract demand is more muted. Demand did rise 2.2% in March but this only reduces the quarterly fall to 6.6%. But this should be regarded as seasonal rather than structural. The Index is on 167.86, still remarkably high. The seasonal pattern in prior years suggests temporary and contract job opportunities are likely to increase during the year.

**CHART 1 NATIONAL INDEX AND JOB TYPE ANALYSIS**

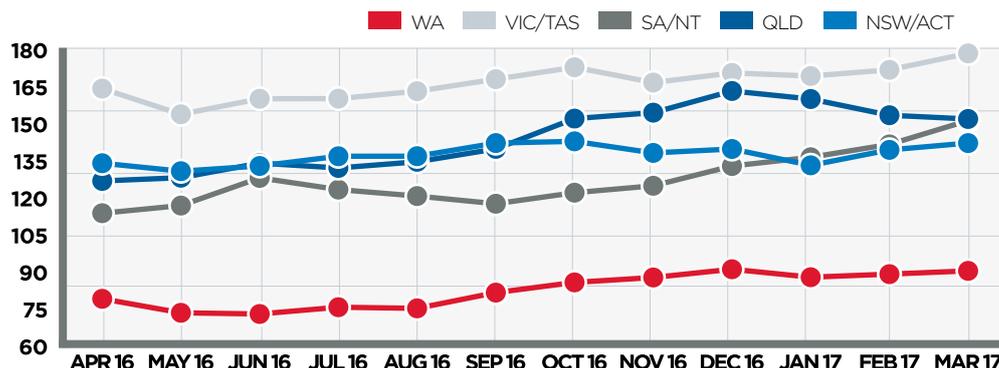


## Bumper year likely for job seekers in Victoria

Once more Queensland bucked the trend! While it shrunk by 1% all states and territories rose in March. Demand peaked at a record high in December but has slipped back every month since then. In total, vacancies have fallen 7% in Queensland in 2017 but, because its performance was particularly strong in mid 2016, demand is still up a very healthy 23.8%. Some of this decline may be seasonal and improving conditions in the resources sector and construction should give cause for more optimism amongst job seekers. It's good to report a rise of 2% in NSW/ACT. This market has been very flat for much of the year, up just 5.7%. Only Western Australia grew

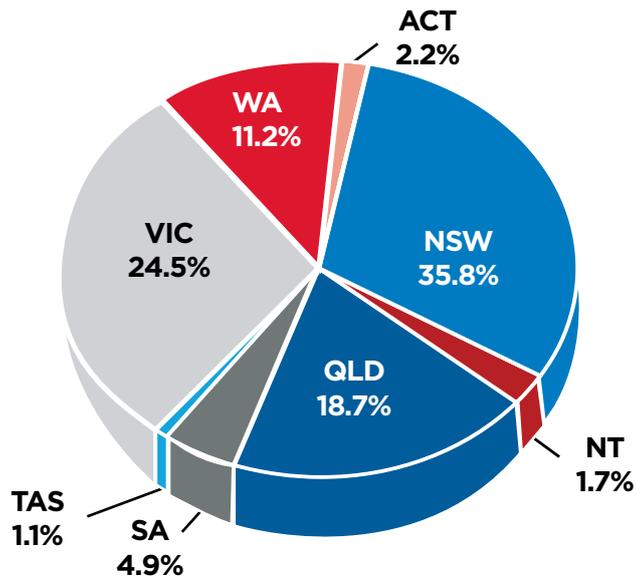
at a lower rate! WA is still in very poor shape. Demand did actually rise 1.5% in March but the momentum seen in mid 2016 has dissipated. Demand is up just 4.1% year on year from a very low base! Commodity prices are now easing so it's hard to see WA regaining lost ground. VIC/TAS has found fresh momentum. Demand rose a very healthy 3.9% in March, once more taking the Index into new record territory. The Index rose to 177.71 exceeding the previous record of 172.09 in October last year. So after a flat last quarter of 2016 this looks like a bumper year for job seekers in VIC/TAS. The graph 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 MARCH 2017

While WA and Qld continue to show softness in demand the overall market is able to produce strong growth because both NSW and Victoria are performing strongly and they dominate the national market with over 60% of all advertised vacancies.



## OCCUPATIONAL ANALYSIS

### Surge in management hiring - beware volatility

The year has started very strongly for TL&SC Management positions. Vacancies rose particularly strongly in March topping the big rise seen in February! The Management Index had been lagging other occupations for much of the second half of 2016 but this sudden surge of hiring activity has raised demand to a level similar to that of Clerical opportunities. The Index is now at 122.74 just shy of the record high of 124.90 set last July. Naturally the volume of

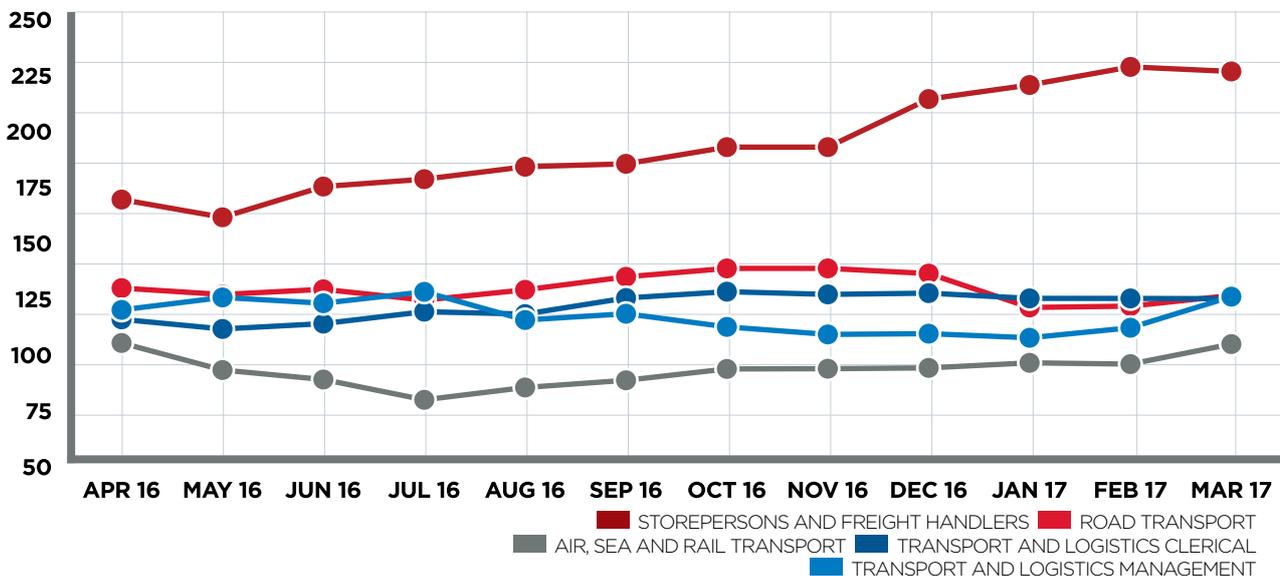
advertisements for more senior executive positions is always going to be lower than more general staffing. Whilst the recent trend is worth celebrating demand tends to be more volatile so continued expansion will be critical if this is to be sustained.

There was also good growth for Air Sea and Rail Transport jobs. The Index just passed the 100 baseline for the first time since April last year. April 2016 remains the best level for job opportunities for over two

years. Continued growth will see this record passed this year.

For once demand for Store Persons and Freight Handlers actually fell. This was just a 0.9% fall from the record of 225.50 set last month. This is the first decline after nine consecutive months of growth during which time demand rose 29.9%. There is every good reason to believe that this is just a temporary aberration!

**CHART 4** ANALYSIS OF JOB ADVERTISEMENTS BY SPECIALIST OCCUPATION



# INDUSTRY ANALYSIS

## New highs in Public Administration and Transport and Logistics

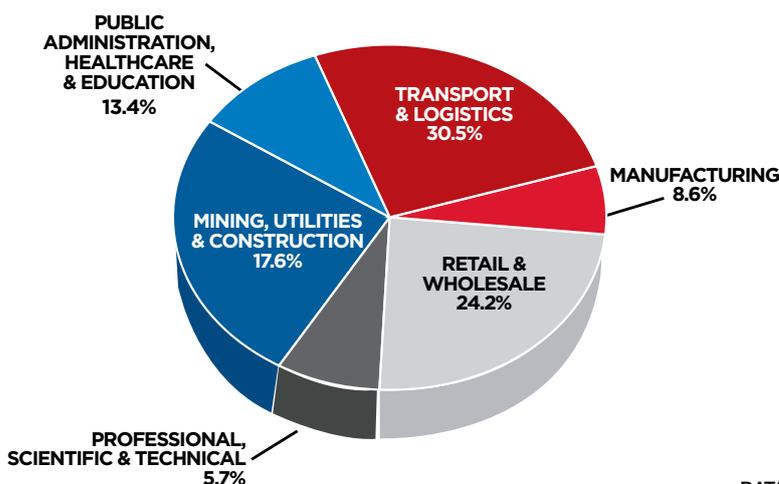
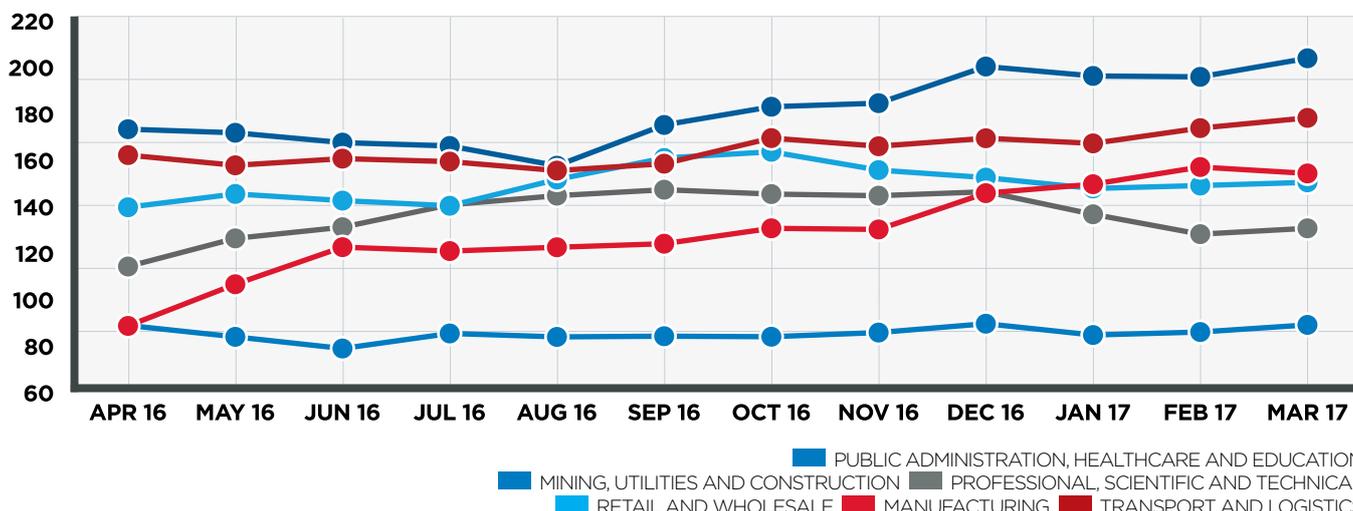
In March, two major sectors hit new highs. Public Administration (which includes health and education sectors) rose a very robust 4.1% taking the Index to 201.98. This is the first sector to exceed 200, meaning that job opportunities have more than doubled since we began measuring in late 2013. Demand amongst Transport and Logistics employers also hit a record high, of 176.33. What is most impressive here is that the

2.6% rise was on top of the record set last month! Interestingly as demand was also very strong this time last year, the year on year growth is just 10%. 5.2% of this expansion was achieved in the first quarter of this year. Disappointingly Manufacturing was unable to sustain its bull run of growth. Demand eased back 1.8% from the record high established last month. Job opportunities are still well ahead of anytime last year

so job seekers should not bypass this essential sector. Transport and Logistics employers were also out in force with job opportunities up a very healthy 4%. The Index rose to 171.93. This is also a record high exceeding the previous record of 167.73 set in October 2016.

The graph 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 MARCH 2017**

The new record set by Transport and Logistics employers maintains their share over 30%. This is substantially larger than the 24.6% share held when publishing started in November 2013. But it has also been as high as 33.6% (July 2016)

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

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