

Transport, Logistics & Supply Chain Job Index

REPORT

KEY FINDINGS

- ⚙️ **The National Index has risen a further 1.1% in July, 9.0% over six months**
- ⚙️ **Temporary and Contract remain very strong rising 4.6% in the month**
- ⚙️ **The TL&SC market continues to outperform the broader employment market**
- ⚙️ **WA had a welcome bounce this month but still remains weak**
- ⚙️ **Victoria is the stand out state with its Index at 131.35**
- ⚙️ **Demand for TL&SC clerical staff grew at the expense of managerial roles**
- ⚙️ **Demand for Store persons and Freight handlers continues to build**
- ⚙️ **Employers in Retail, Wholesale and Manufacturing picked up recruitment activity in July**

1 IN 10 WORKERS ABSENT OR AFFECTED BY DRUGS AT WORK

A recent poll conducted by the Australian Drug Foundation found 10% of Victorian employees had either taken a day off and/or gone to work feeling the effects of their drug use.

In a large sample of Victorian workers, drugs were identified as illegal drugs; synthetic drugs and un-prescribed pharmaceutical medications.

The Australian Drug Foundation's Head of Workplace Services, Phillip Collins, said weekend drug use can have a major impact on workplace productivity, performance, absenteeism and office health and safety.

"Feeling the after effects of weekend drug use can be just as problematic as being intoxicated on the job. Headaches, blurred vision, irritability, difficulty concentrating and extreme tiredness can all create organisational problems.

"Drugs and alcohol cost Australian businesses \$6 billion a year in lost productivity and absenteeism alone. Then there's the serious health and safety risks in the workplace, particularly where employees operate machinery or drive vehicles."

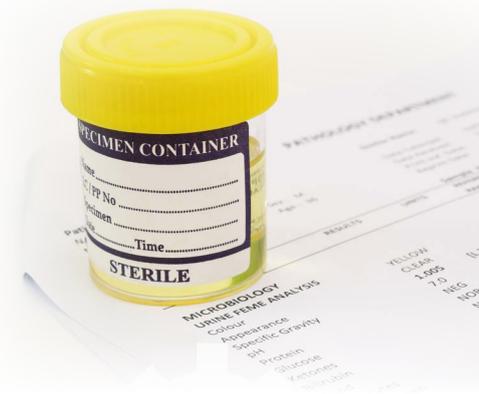
That is why Labourforce drug and alcohol test every potential employee. Drug and alcohol testing is part of the value we provide to all of our clients.

Mr Collins said that many workplaces are now looking to drug testing as a solution to ensure workers aren't under the influence of drugs while at work – but he warns that employers should be wary.

LabourHealth provides drug and alcohol testing, support, advice and training in your workplace. We come to you. We have a network of mobile assessment centres that we bring to you.

Call LabourHealth today for a free quote and obligation free assessment on 1300 306 866.

We even have an after-hours Injury Management Hotline, so we're on hand to help you 24 hours a day, 7 days a week.



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.

They also use their custom built trailers that come to your workplace for testing dugs & alcohol, hearing & audiometric, and physio & treatment.

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

NATIONAL JOB INDEX

Strong momentum set to continue

The Transport Logistics and Supply Chain employment market has seen further signs of improvement with the Labourforce Impex Job Index rising 1.1% to 108.08 in July. Demand has been strong through 2014 rising 9.0% in six months. The continued strong momentum in the sector looks set to continue.

Yet again, the rise in Temporary and Contract opportunities has been the more

impressive. It rose 4.6% for the month and is up 17.6% over three months. The permanent job market has also performed well with vacancies advertised rising 8.3% for the quarter but only by 0.1% in July. The Transport, Logistics and Supply Chain sector continues to outperform the overall Australian employment market. Trends suggest continued growth.

CHART 1 NATIONAL INDEX AND JOB TYPE ANALYSIS



STATE ANALYSIS

WA surprises with strong growth. Eastern states performing well

In a surprise development Western Australia was the top performing region with employment advertising volumes growing 6.7% in July. The WA Index now sits at 79.58 so there is a long way yet to go to recover the steep decline seen in late 2013. At least the trend remains very positive. Likewise ST/NT has seen an encouraging recovery in the last quarter although this rebound is levelling off.

All the Eastern states are performing well. All indices sit above the 100 starting point established in September last year. Victoria leads the pack at 131.35 although momentum is now stronger in NSW and Queensland

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

CHART 2 COMPARISON OF STATE JOB INDICES

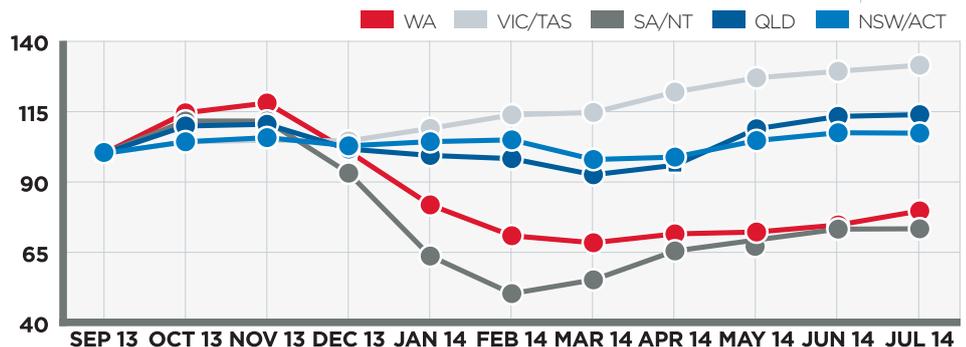
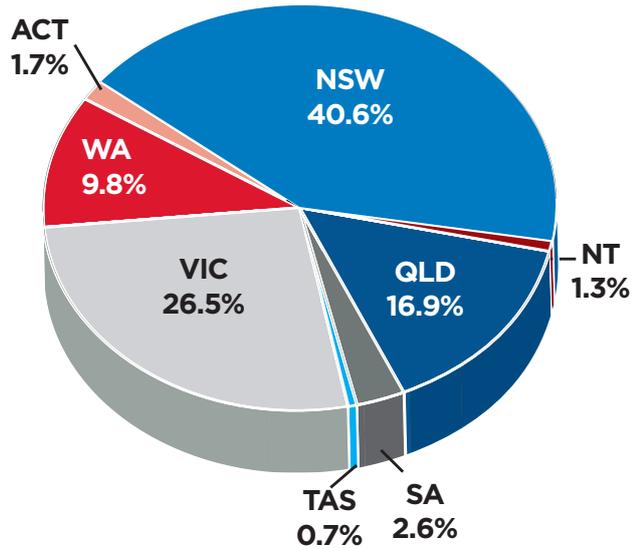


CHART 3
ANALYSIS OF JOB ADVERTISEMENTS
BY STATE AND TERRITORY JULY 2014

The big jump in vacancies advertised in WA last month has finally resulted in WA catching up some lost ground. It's share has risen from 9.3% in June to 9.8% but still well below the 13.7% it held in mid 2013.

Victoria is the big winner with its share now at 26.3% reflecting the strong growth in employment opportunities in Transport, Logistics and Supply Chain in the state over the last ten months.



OCCUPATIONAL ANALYSIS

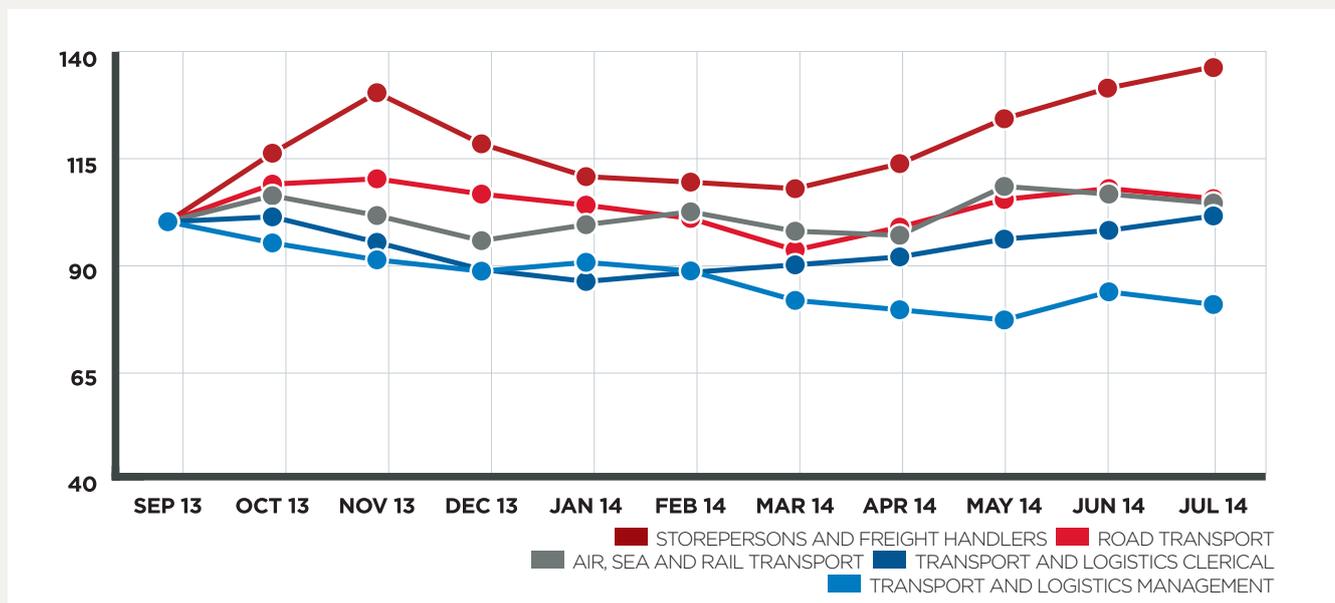
Impressive demand for clerical staff

Some of the 7.9% gain seen amongst demand for Transport, Logistics and Supply Chain Managers in June was lost in July – a fall of 3.5%. Ironically demand for TL&SC clerical staff grew 3.6%. Demand for clerical staff in the sector has grown an impressive 10.5% in the last quarter. The Index for Clerical is now at 101.37, exceeding the 100 benchmark for the first time since last October. The Managerial equivalent sits at 80.52. It may be that employers are choosing to employ people in processing roles rather than swelling their managerial ranks?

There seems to be no stopping in demand for Storepersons and Freight Handlers. The Index rose a staggering 6.8% in July alone. The Index now sits at 136.28. Demand has risen 23.2% in just six months.

Both Road and Air, Sea and Rail Transport specialists markets seem to be following similar trends. Both fell 2% in July and their indices currently sit at 105.44 and 104.39 respectively.

CHART 4 ANALYSIS OF JOB ADVERTISEMENTS BY SPECIALIST OCCUPATION



INDUSTRY ANALYSIS

Manufacturing continues to impress

Retail and Wholesale employers have again been picking up recruitment activity with a further 7.0% increase in vacancies advertised. That contributes to a 23.2% rise in the quarter bringing the Retail and Wholesale Index back up to 91.16.

Manufacturing continues to surprise and impress with a 5.7% rise in July. The Index now sits at

119.17, pushed up by a 11.4% rise in the last quarter.

The trend is not nearly as encouraging in the heavy goods and capital sectors with the Mining, Utilities and Construction Index falling a punishing 7.0%. These sectors had held up very well in late 2014 but all seem to be feeling the pinch now.

CHART 5 ANALYSIS OF JOB ADVERTISEMENTS BY INDUSTRY

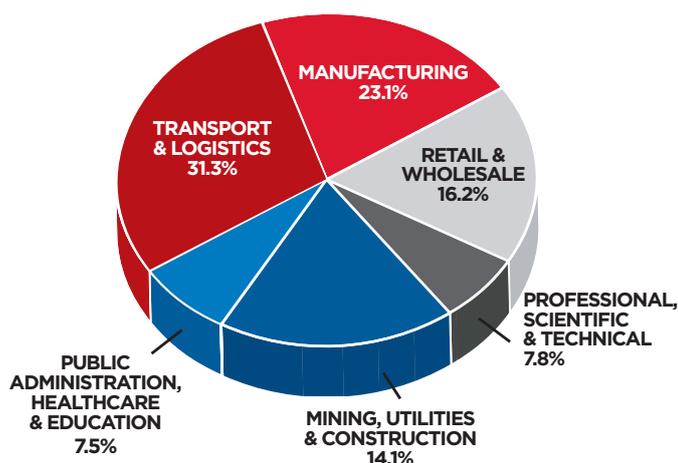
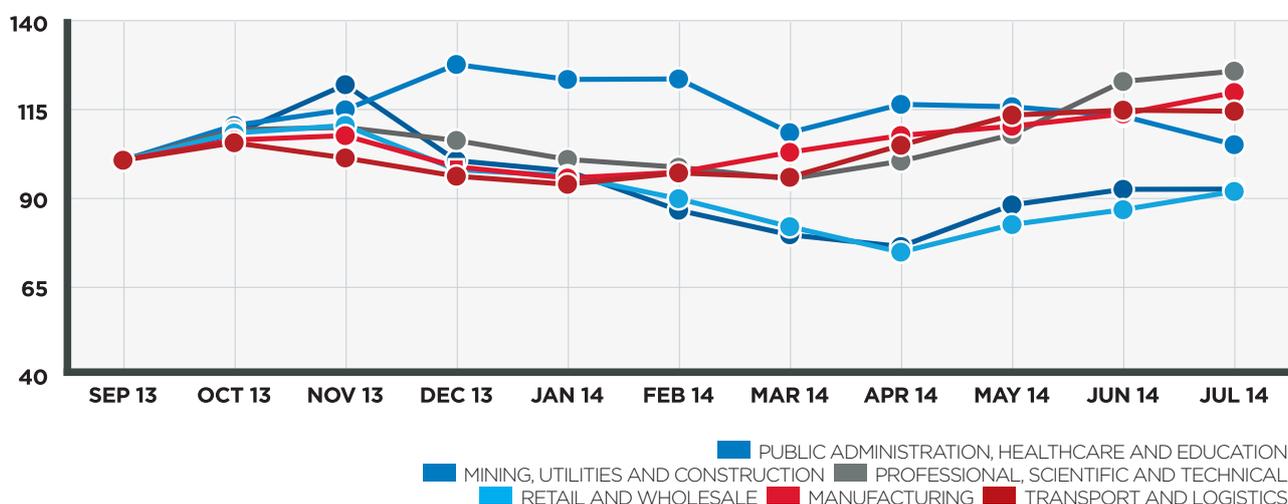


CHART 6 THE PROPORTION OF JOB ADVERTISEMENTS BY INDUSTRY JULY 2014

Transport and Logistics, not surprisingly, remains the largest employer group. It's share has risen from 29.7% to 31.3%. Retail and Wholesale picked up some lost ground rising to 16.2% while Mining, Utilities and Construction slipped to a 14.1% share.

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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