

Transport, Logistics & Supply Chain Job Index

REPORT

KEY FINDINGS

- ⦿ The Labourforce Impex Transport, Logistics and Supply Chain Job Index rose again In November, this time by 2.4%
- ⦿ The Index now sits at 128.19, a new record high for the sector
- ⦿ Temporary and Contract demand is the major driver, up 4.5% in November and 27.4% over six months
- ⦿ Permanent also remains strong, up a further 1.4%
- ⦿ Western Australia is finally showing signs of recovery, up for a second month, this time by 7.1%
- ⦿ Victoria remains the fastest growing but NSW still offers the most vacancies - 35.7%
- ⦿ Demand for Store Persons and Freight Handlers has grown substantially over the last 6 months, but with Christmas approaching, demand is finally starting to slow
- ⦿ Road Transport opportunities are also up another 6.9% in November on the back of pre Christmas activity
- ⦿ It's been a dream run with demand up 21.6% over six months for Retail and Wholesale but season demand may have peaked and expect a soft landing in the New Year
- ⦿ Mining, Utilities and Construction, Manufacturing and the Public Sector are all showing good signs of growth in recent months

Merry Christmas

Thank you for your partnership this year.

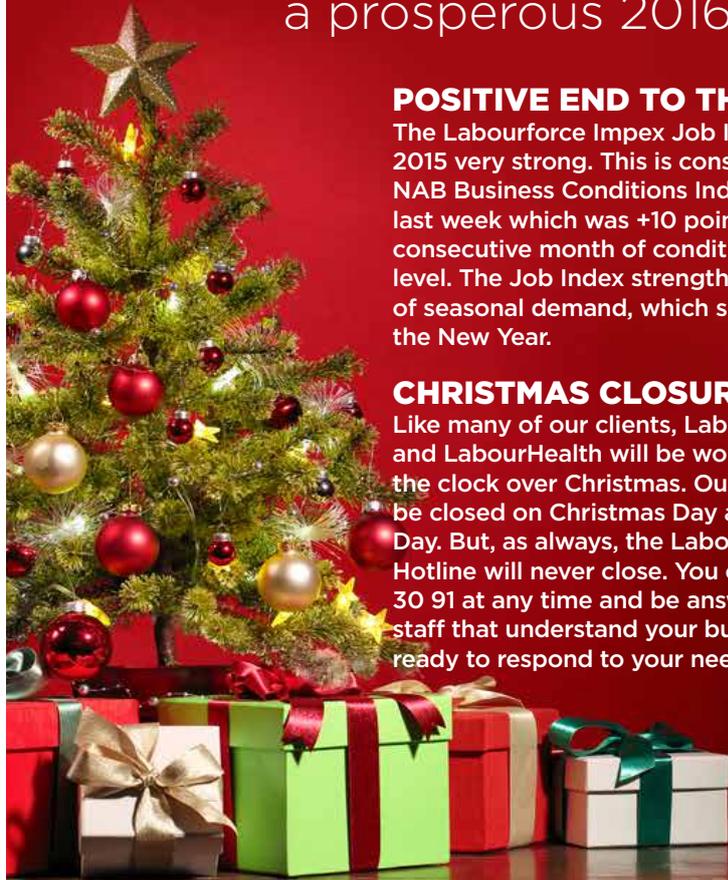
We would like to wish you a happy and safe Christmas and a prosperous 2016.

POSITIVE END TO THE YEAR

The Labourforce Impex Job Index finishes 2015 very strong. This is consistent with the NAB Business Conditions Index released last week which was +10 points - the fourth consecutive month of conditions at this level. The Job Index strength is on the back of seasonal demand, which should ease in the New Year.

CHRISTMAS CLOSURE

Like many of our clients, Labourforce, Impex and LabourHealth will be working around the clock over Christmas. Our offices will be closed on Christmas Day and New Years Day. But, as always, the Labourforce 24 hour Hotline will never close. You can call us on 13 30 91 at any time and be answered by local staff that understand your business and are ready to respond to your needs.



NATIONAL JOB INDEX

Growth continues into Christmas. New Year softening expected

The Labourforce/Impex Transport Logistics and Supply Chain Job Index enjoyed another strong rise in job vacancies with the number of advertisements in November rising 2.4%. This is the fourth consecutive rise generating a remarkable 15.2% rise in the last quarter alone. The Index rose from 125.24 to a new record high of 128.19. As we saw last year the rate of

growth does start to tail off in November and we can expect a softening in the temporary and contract space in the early New Year. The market is now 7.2% higher than this time last year.

The Temporary and Contract remains the major driver, this month growing 4.5%. Demand has risen 27.4% in the last six months and is an incredible 22.5% higher than November last year.

This growth will not be sustained after Christmas and we expect the temporary market to contract in the first quarter of 2016.

The Permanent market has also grown. It rose just 1.4%. It is only 1.6% higher than November 2014 but the strength seen in the last six months (up 14.8%) should hold up well into the New Year.

This year has been an exciting time for the transport, logistics and supply chain sector.

There has been an incredible boost in the number of jobs advertised as confidence in our sector builds. There has also seen significant consolidation, new entrants, new technology and efficiencies being made.

Labourforce and Impex are proud to be part of this exciting industry and look forward to continuing to meet all of your workforce needs as we continue to change and grow.

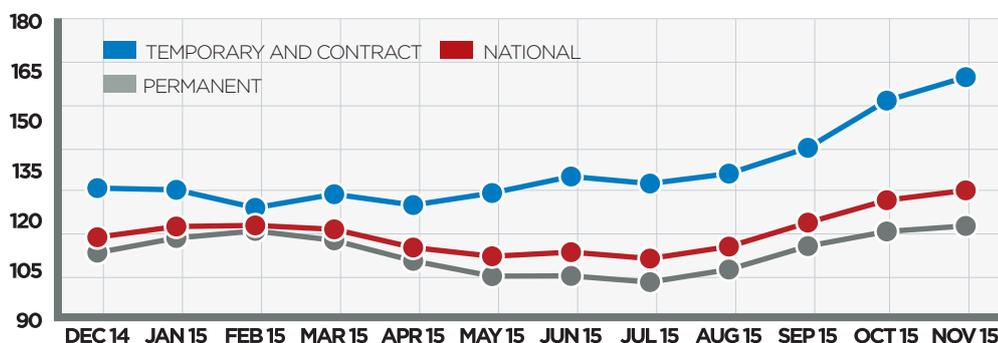
I would personally like to wish all of readers, customers and candidates a Merry Christmas, a safe holiday (if you are having one!) and a prosperous 2016.



Regan Brown

Regan Brown
MANAGING DIRECTOR
IMPEX PERSONNEL

CHART 1 NATIONAL INDEX AND JOB TYPE ANALYSIS



STATE ANALYSIS

WA surprises for second month. Victoria record high

All states and territories enjoyed growth in November. Surprisingly the strongest growth in demand was seen in Western Australia where it grew 7.1%! This is the second month that WA has outperformed all other states and territories, albeit from a far lower base. Vacancies in WA are still 25.0% below the level seen a year ago but the signs of improvement are encouraging.

Queensland is also showing a very positive trend of late. It expanded by 3.6% contributing to a 17.4% rise for the quarter. Despite the slowdown in the Mining and Resources sector which has hurt the state, demand for TSC&L staff is actually up 7.9% over 12 months in the Sunshine State.

VIC/TAS remains the strongest state with an Index of 154.79, a new record high, 13.7% higher than a year ago.

CHART 2 COMPARISON OF STATE JOB INDICES

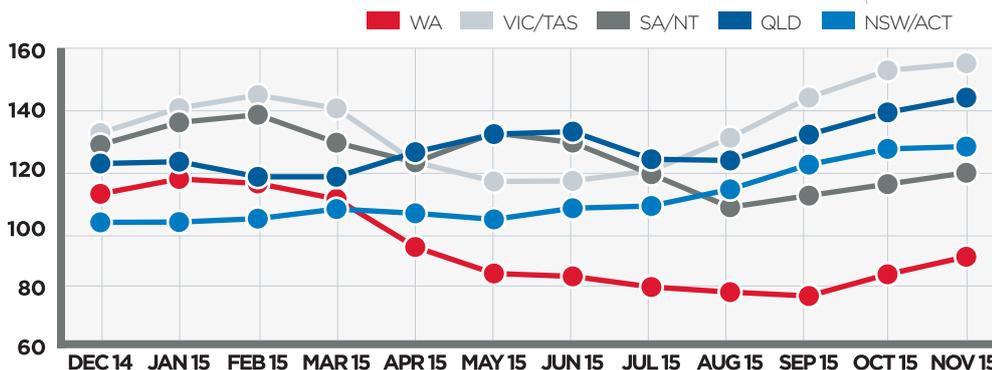
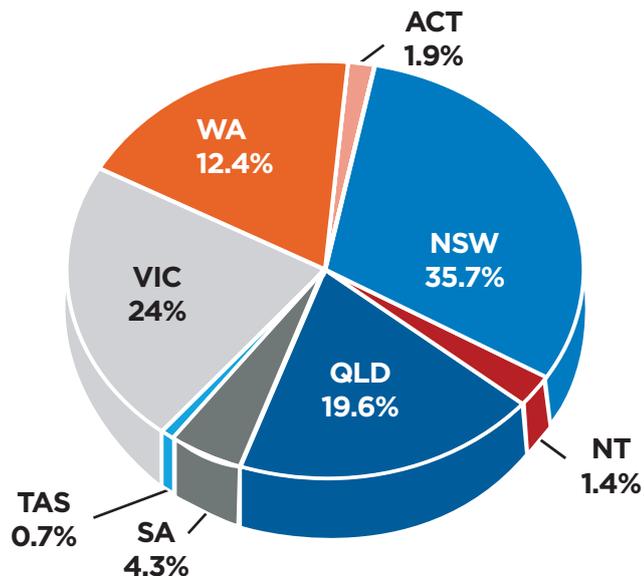


CHART 3
ANALYSIS OF JOB ADVERTISEMENTS BY STATE AND TERRITORY NOVEMBER 2015

The pickup in demand in WA and Queensland has seen their respective share start to rise again. While Queensland has been able to maintain its share just shy of 20%, WA is still well behind the 17.7% share it held in November 2014.



OCCUPATIONAL ANALYSIS

Momentum slowing in lead up to Christmas. Beware New Year

Demand for Store Persons and Freight Handlers managed one more month of growth, 1.2% in November but, as anticipated, momentum is running out in the lead up to Christmas. We've seen demand pick up 25.2% in the last three months, mostly temporary opportunity and this is likely to contract

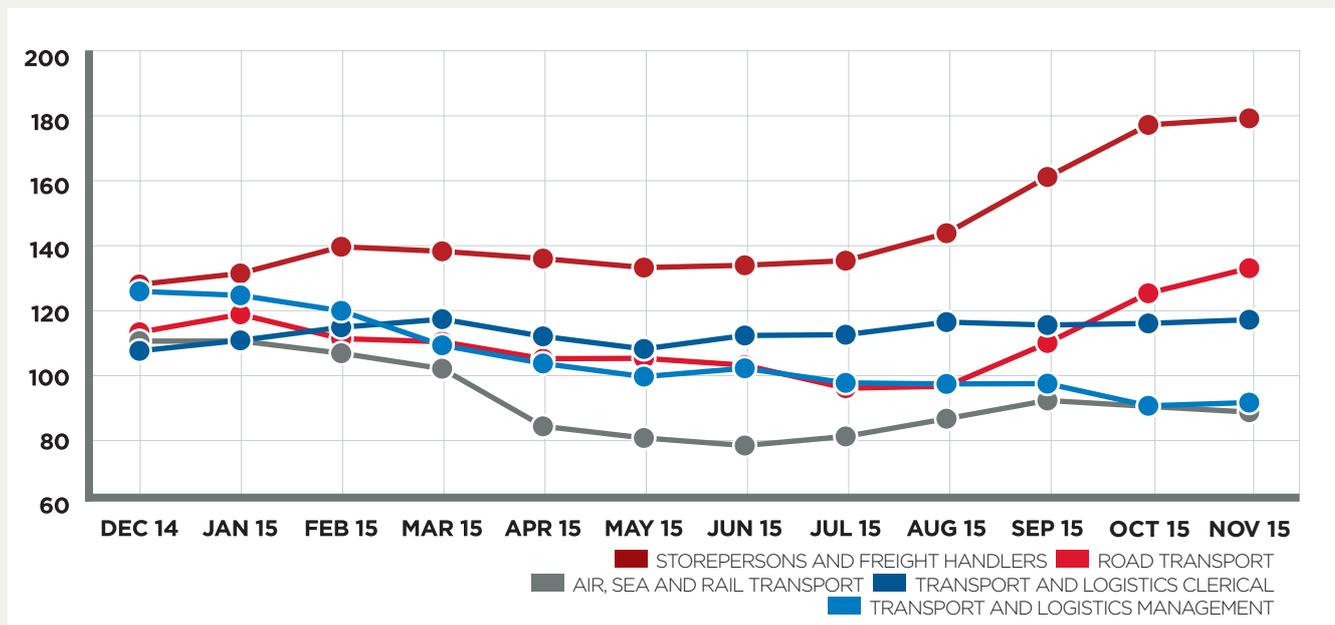
sharply in the New Year.

In contrast Road Transport demand managed 6.3% growth, a sizeable gain, although well short of the 14.4% growth experienced in October. But it's still a record high index of 131.82.

Things remain subdued in the white

collar arena. Clerical roles rose by 1.0% while management vacancies were up just 1.1%. Clerical roles are still just 2.5% higher than a year ago while management opportunities are down a very disappointing 26.0% over the same period.

CHART 4 ANALYSIS OF JOB ADVERTISEMENTS BY SPECIALIST OCCUPATION



INDUSTRY ANALYSIS

Dream run continues. Soft landing expected early 2016

November saw growth across all key industries. Retail and Wholesale rose 1.6%. It's been a dream run with demand up 21.6% over six months. We predict a soft landing as the market contracts post Christmas.

The big gains this month were seen in Manufacturing, up a surprisingly

strong 11.7% and Public Admin, Health and Education, also picking up 12.0%. With little change of late in exchange rates the former can only be attributed to a pickup in domestic demand with more positive business and consumer sentiment. Both have enjoyed strong quarters, up 25.2% and 33.7% respectively.

Mining, Utilities and Construction has also seen signs of improvement. While growth was just 1.9% in November, that's three consecutive months of improvement totalling 19.8% in a quarter. The sector is still 14.2% below that recorded a year ago but the recent trend is more encouraging.

CHART 5 ANALYSIS OF JOB ADVERTISEMENTS BY INDUSTRY

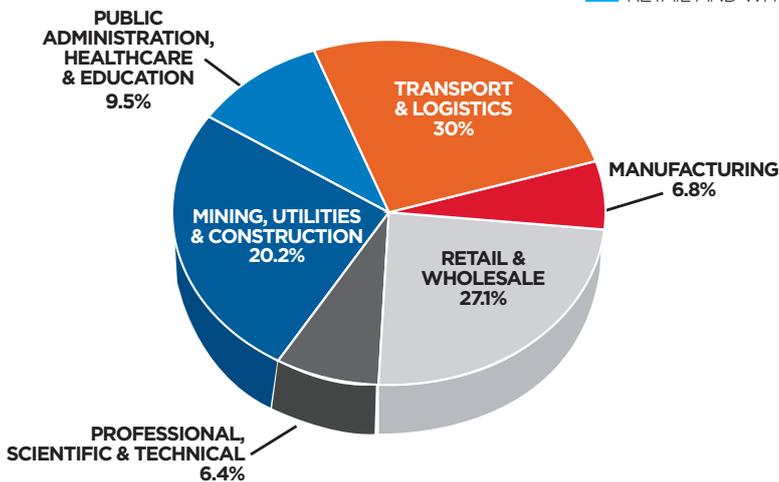
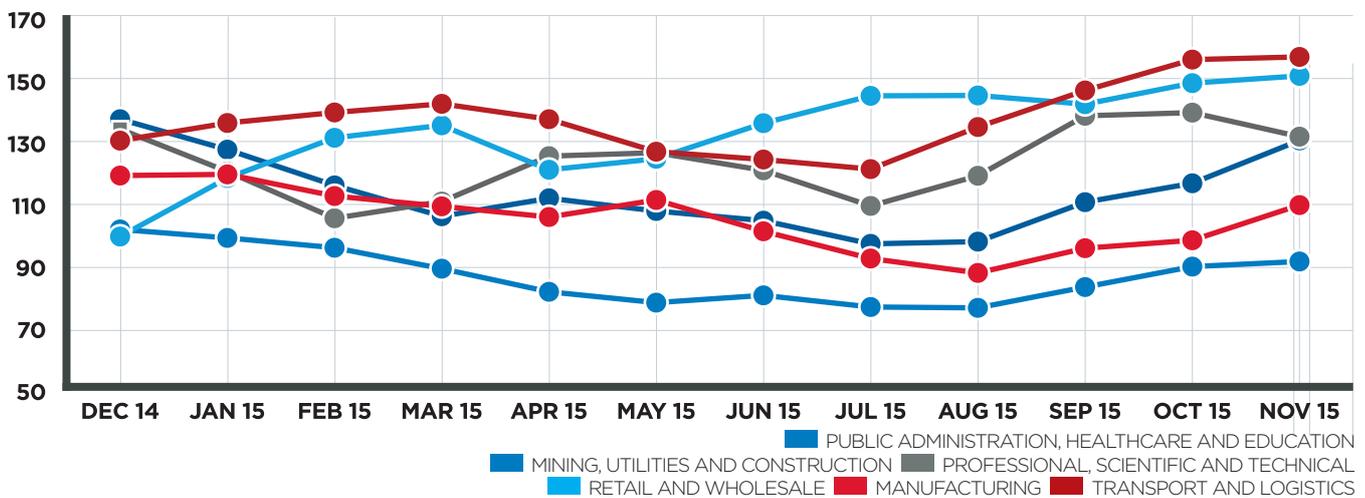


CHART 6 THE PROPORTION OF JOB ADVERTISEMENTS BY INDUSTRY NOVEMBER 2015

The recent strength in Mining, Utilities and Construction has seen its share rise to 20.2%. It is still a critical industry for TSC&L employment. As the boom in retail slows we now see its share of the national market shrinking. In November it fell to 27.1%, having topped 30% as recently as July.

In October 2014 the Labourforce / Impex Transport, Logistics and Supply Chain Job Index was recalibrated to take account of the demise of MyCareer.com.au, a single but significant source of job advertisement data. This has involved a complete rerun of all historical data. This will produce more accurate and less volatile data. However as all indices have been restated comparison to prior reports is not possible.

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

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