

supply chain & logistics

2009 employment market survey report



key findings

The 2009 survey respondents represent a broader geographical sample than 2008 and provide a useful insight into the current trends in various regions from across the globe. 17.05% of the total respondents indicated that they are employed in the Middle East followed closely by 15.15% in Asia and 14.07% in Europe.

21.41% of the total respondents indicated that they are employed in a Logistics and Transport role with 16.79% working in a Supply Chain role. 31.01% are employed in either the 3PL/4PL industry or Logistics and Warehousing industry. This compares to the 2008 report where 24.37% were employed in the Logistics industry and 18.85% in the Supply Chain industry.

The 2009 report continues to highlight the increasing levels of education that are represented within the professionals and practitioners who are employed in the Supply Chain and Logistics industry. 36.38% of the total respondents indicated that they have completed an Undergraduate Degree and 33.77% have completed a Postgraduate Degree. These results show there is a higher level of both Undergraduate and Postgraduate Degrees in 2009. This compares to the 2008 results which showed 24.93% completed a Postgraduate Degree and 21.03% an Undergraduate Degree.

Career mobility continues to play a key dynamic in our industry and is once again reflected in the 2009 report. 47.28% of the total respondents indicating that they have relocated in the last three years for their careers, with 50.59% of that group indicated that they have relocated internationally. 88.32% of the total respondents indicated that they would in fact consider relocation for their career in the future.

Some new questions have been added to the 2009 survey and include determining whether Supply Chain and Logistics is represented by a Director at board meetings. 54.40% of the total respondents indicated that Supply Chain and Logistics is represented by a Director at Board meetings in their company. These results suggest that there is increasing recognition of our industry in board rooms around the world.

The survey also assesses factors influencing recruitment decisions including why people join particular organisations over others. It is of note that the trend towards career advancement ahead of higher remuneration continues. 86.56% of the total respondents indicated that people joined their organisation for career advancement. 66.30% of the total respondents indicated they joined for higher remuneration.

The survey shows a significant decline in predicted business growth compared to last year and this is no doubt indicative of the current state of the global financial crisis. 45.00% of the total respondents indicated that they believe that their company's growth has increased in the last financial year. This compares to 82.23% who indicated that business activities and growth had increased in the 2008 results. In this year's results, 55.22% of the total respondents predict their company's growth will increase. This compares to 82.36% in the 2008 results who predicted that business activities and growth would increase.

This year's survey contained a range of questions about the relevance and importance of Corporate Social Responsibility in (CSR) today's business environment. The findings illustrated a significant recognition of CSR throughout our industry.

survey methodology

An on-line survey of approximately 10-15 minute duration was emailed to more than 20,000 people within the Supply Chain & Logistics Industry in Australia, Oceania, Africa, America, Asia, Europe, the Middle East and New Zealand. The survey commenced on the 12th of March 2009 and was closed on the 22nd of May 2009. 2680 respondents completed the survey. NB: The results are purely indicative in terms of overall trends within the industry. Disclaimer: Logistics Executive has compiled this report using data from which, to the best knowledge of Logistics Executive, was accurate as at the date of the publication. Results published in this report are for the general interest of readers and the industry. All material is published with due care and in good faith, but no responsibility will be accepted for omissions, typographical, or other printing errors or situations that may have taken place after publication. Logistics Executive disclaims all responsibility for any harm or loss arising from use or otherwise of the information provided within the report. All rights reserved. No part of this publication may be reproduced without the prior permission of Logistics Executive.

2009 employment market survey report

Welcome to the 2009 Supply Chain and Logistics Employment Market Survey Report. This is our third consecutive annual report developed for the industry that we serve globally. The 2009 report highlights key issues that have influenced the international Supply Chain and Logistics industry during a year of change and consolidation.

The survey has been undertaken against a background of the Global Financial Crisis and macro economic factors have had a significant impact on the international Supply Chain and Logistics communities. There is strong evidence of the market continuing to see the recruitment and deployment of key executive talent as pivotal to managing successfully through the current recessionary environment.

Our industry has proven more resilient than most during previous economic downturns and while it is clear that many companies are under severe financial pressure, there is evidence of our industry maintaining its fundamental core strength as a result of it underpinning almost every sector of the economy.

Late 2008 and early 2009 was typified by a general lack of confidence across the global business community which resulted in a decline in activity across the global Supply Chain and Logistics industry. Downward customer pricing and yield pressure along with world-wide, regional and local competition has driven significant rationalisation and integration of business units as many organisations seek to achieve cost savings and performance benefits from resized and recalibrated operations.

There has been an inevitable rise in the demand for career transition and outplacement services as businesses seek to redeploy human resources within their operations and in many cases adopt short term reduction of non revenue generating personnel.

As with past periods of rapid consolidation there is now emerging evidence that financially sound international and regional tier one and tier two market participants are leveraging current economic conditions as an opportunity to expand.



Rationalisation and M&A activity has increased demand for Search and Recruitment of high calibre VPs, Country Managers, BD Directors, CFOs and CEOs to drive new business models in order to optimise growth and profitability during the next 12 to 15 months.

We also see an on-going global demand for specialist proven executives, to have opportunities for employment as consultants / contract and interim managers with particularly high demand for senior talent across the FMCG, Specialist Retail, Healthcare, Cold Chain, Contract Logistics, Specialist Warehousing, and Freight Management sectors.

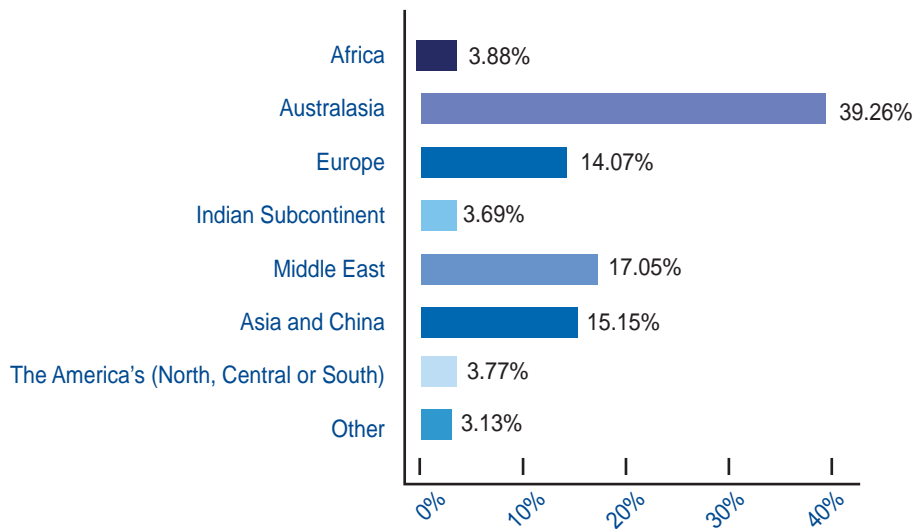
As we enter the second half of 2009, feedback from our global pool of senior candidates leads us to believe we are experiencing the early stages of a slow and steady market recovery many predict for mid to late 2010.

Thanks to the many industry executives across the 82 countries who completed the survey. The resulting report is designed to share the findings with you our industry colleagues, offering an insight into the dynamics influencing global employment trends and to assist in your business decision making in the challenging year ahead. Feedback on this years report is welcome as are your suggestions for new questions to be included in the 2010 survey. Please let us know if you require more detailed data results from the survey.

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survey demographic

in which region of the world are you employed in?



overall findings

- ▷ 17.05% of the total respondents indicated that they are employed in the Middle East.
- ▷ 15.15% of the total respondents indicated that they are employed in Asia.
- ▷ 14.07% of the total respondents indicated that they are employed in Europe.

industry type

which industry are you employed in?

overall findings

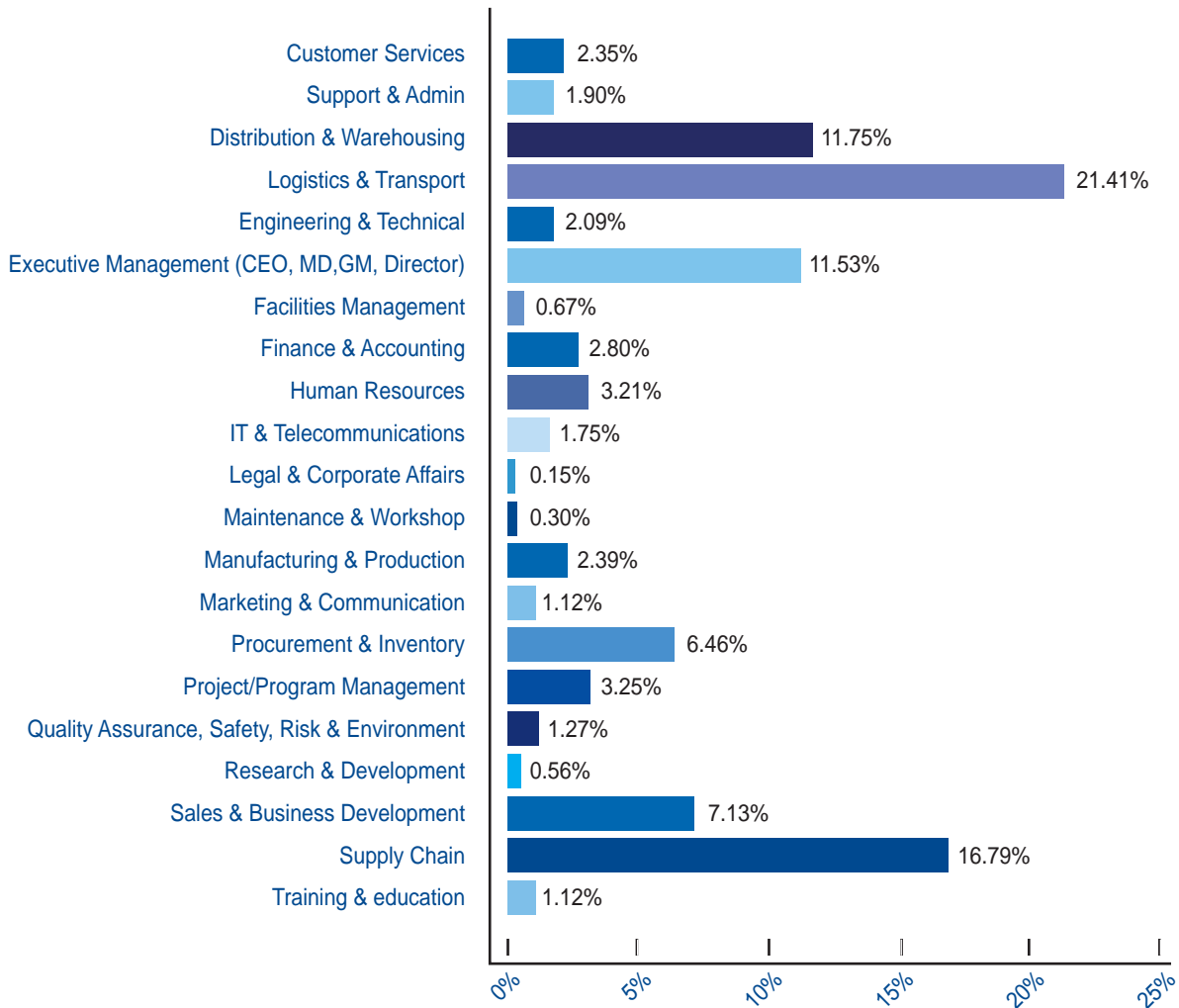
- ▷ 31.01% of the total respondents are employed in the 3PL, 4PL, Logistics or Warehousing industry.
- ▷ 21.98% of the total respondents are employed in the Supply Chain, Sourcing and Procurement industry.
- ▷ 17.43% of the total respondents are employed within the Transport industry.



comparison to the 2008 results

In the 2008 report 24.37% of the total respondents were employed in the Logistics industry and 18.85% in the Supply Chain industry.

please select the role that best describes your vocation?



overall findings

- ▷ 21.41% of the total respondents indicated that they are employed in a Logistics and Transport role.
- ▷ 16.79% of the total respondents indicated that they are employed in a Supply Chain role.
- ▷ 11.75% of the total respondents indicated that they are employed in a Warehousing and Distribution role.

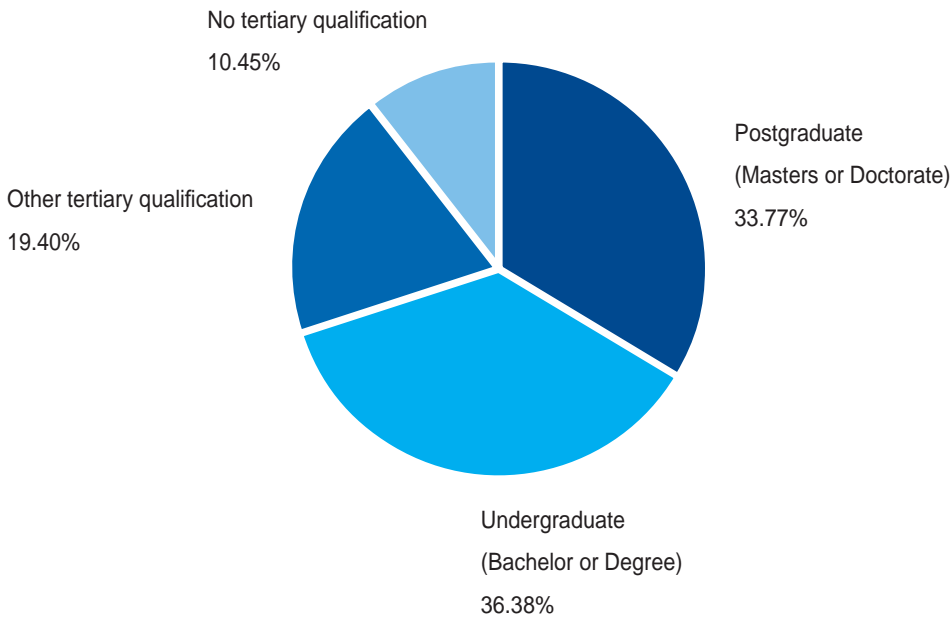
comparison to the 2008 results

These results compare to 2008 where 24.37% were employed in a Logistics role and 18.85% in a Supply Chain role.



education & qualifications

what is the level of the highest qualification that you have completed?

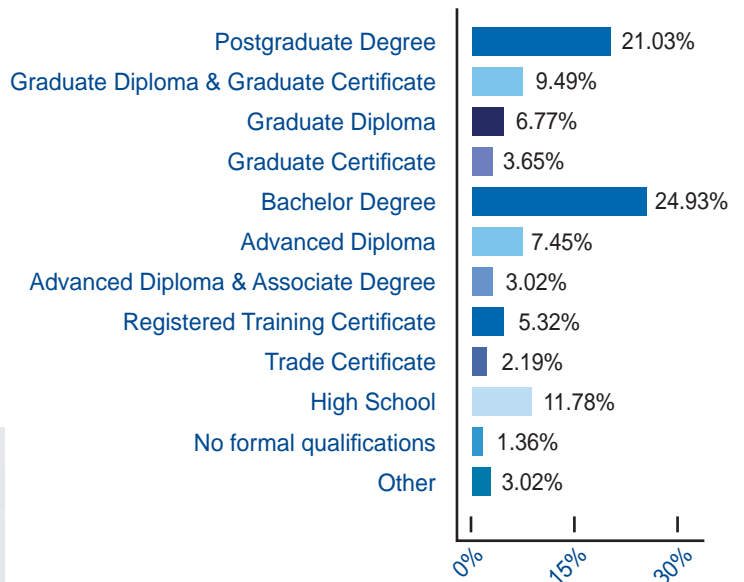


overall findings

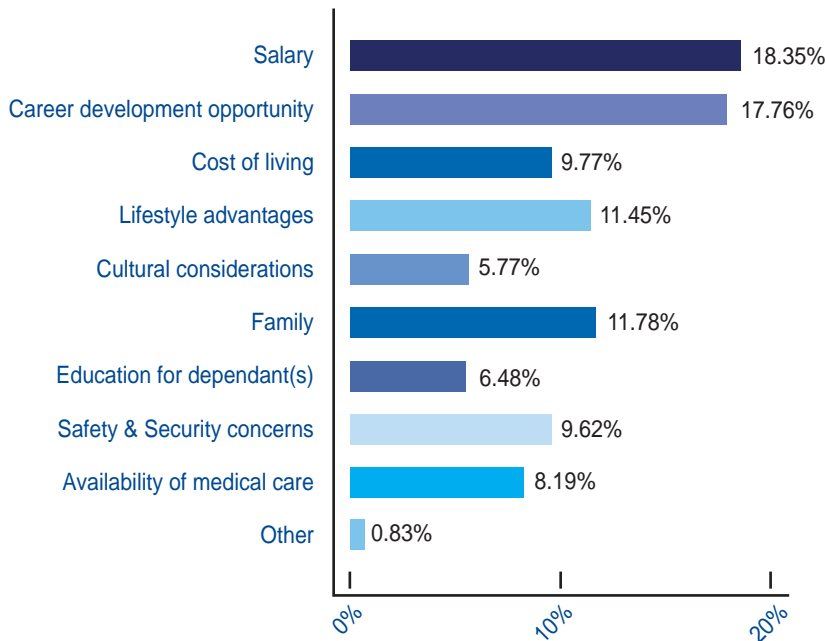
- ▷ 36.38% of the total respondents have completed an Undergraduate Degree.
- ▷ 33.77% of the total respondents have completed a Postgraduate Degree.
- ▷ These results show there is a higher level of both Undergraduate and Postgraduate Degrees in 2009.

comparison to the 2008 results

21.03% of the total respondents completed an Undergraduate Degree and 24.93% completed a Postgraduate Degree.



what are the key issues you would consider prior to undertaking relocation?



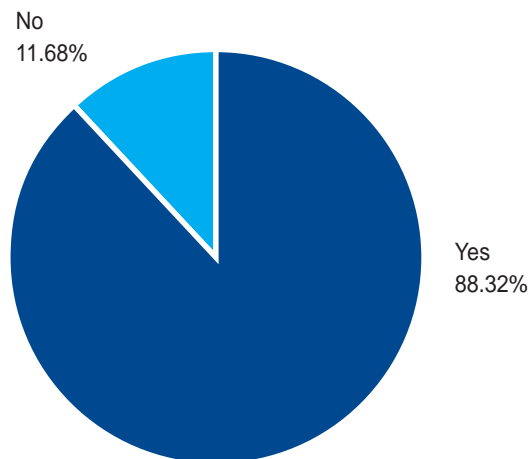
top four issues to consider

- ▷ 18.35% of the respondents would consider salary.
- ▷ 17.76% of the respondents would consider career development opportunities.
- ▷ 11.78% of the respondents would consider family.
- ▷ 11.45% of the respondents would consider lifestyle advantages.

comparison to the 2008 results

In the 2008 report 17.46% of the respondents considered salary, 16.11% career development opportunities, 12.13% family and 11.12% lifestyle advantages.

would you consider relocating for your career in the future?



overall findings

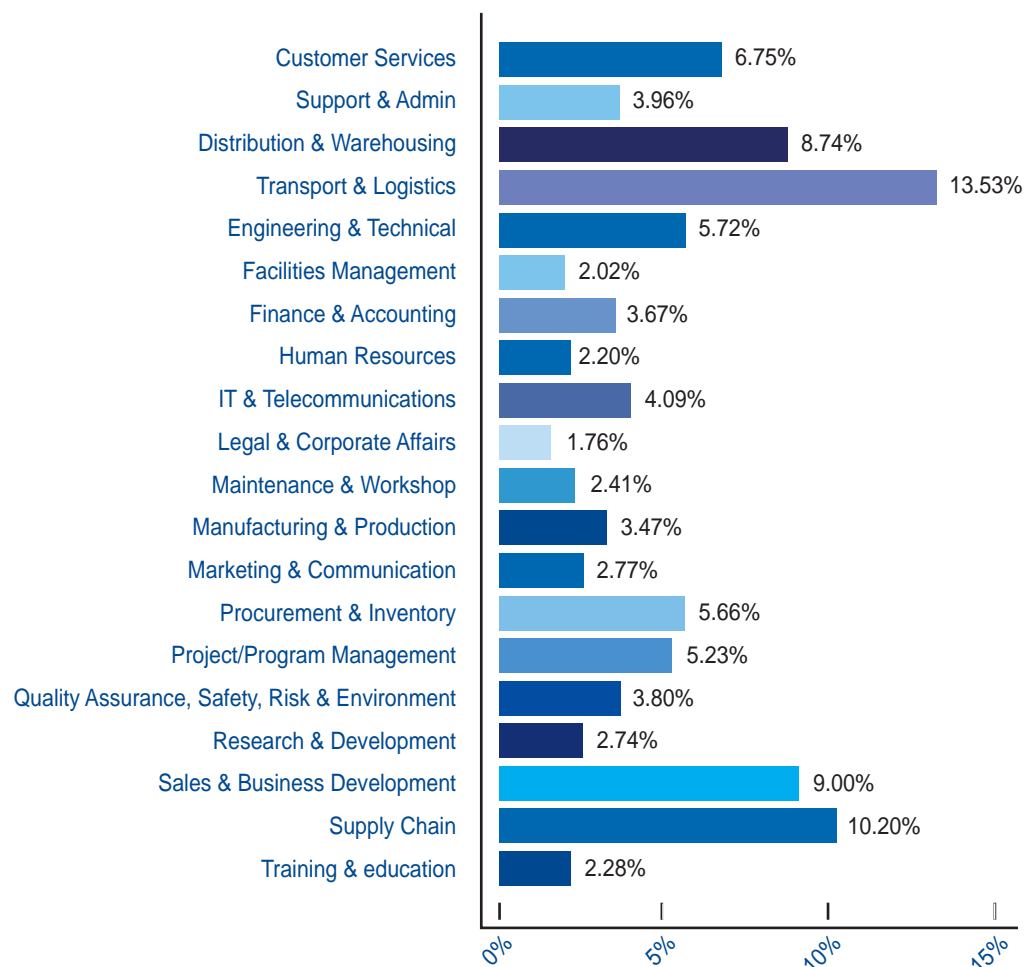
- ▷ 88.32% of the total respondents indicated that they would in fact consider relocation for their career in the future.
- ▷ Career mobility continues to play a key dynamic in our industry and is once again reflected in the 2009 report.

comparison to the 2008 results

This compares to 83.13% in the 2008 results who indicated that they would in fact consider relocation for their career in the future.

skills shortage

areas within the industry that have been difficult to recruit in?



overall findings

- ▷ 13.53% of the respondents indicated that Transport & Logistics is the most difficult area to recruit in. This was followed closely by 10.20% in the Supply Chain area.

comparison to the 2008 results

In the 2008 report 13.92% of the respondents indicated that Logistics was the most difficult area to recruit in.

industry representation at board level

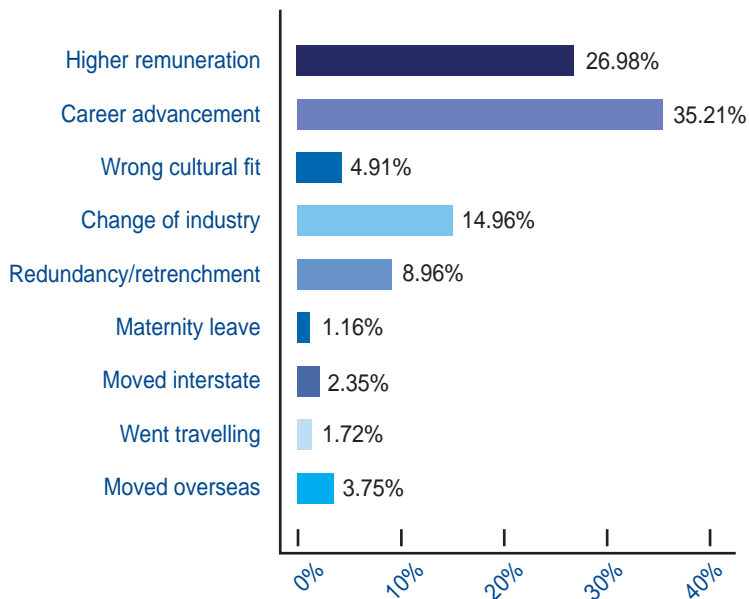
new: is supply chain and logistics represented by a director at board meetings in your company?

overall findings

- ▷ 54.40% of the total respondents indicated that Supply Chain and Logistics is in fact represented by a Director at Board meetings in their company. This result suggests that there is increasing recognition of our industry in board rooms around the world.

factors contributing to recruitment decisions

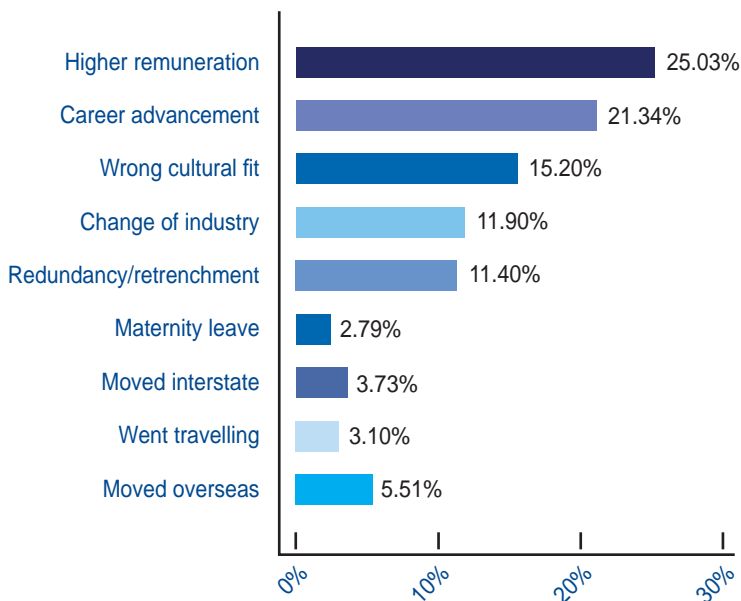
new: what are the factors contributing to people joining your current organisation?



overall findings

- ▷ 35.21% of the total respondents indicated that people join their organisation for career advancement.
- ▷ Career advancement continues to be a significant career decision year on year.
- ▷ 26.98% of the total respondents indicated people join for higher remuneration.

new: as an employer, what are the major factors contributing to people leaving your organisation?

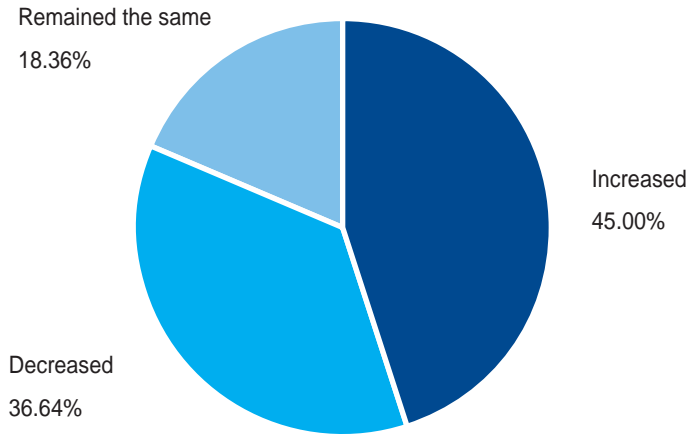


overall findings

- ▷ 25.03% of the respondents indicated that people leave their organisation seeking higher remuneration.
- ▷ 21.34% of the respondents indicated that people leave for career advancement opportunities.
- ▷ 15.20% of the respondents indicated that people leave due to wrong cultural fit.

business activities & company growth

what change in your company's activities or growth this financial year did you see compared to last year?



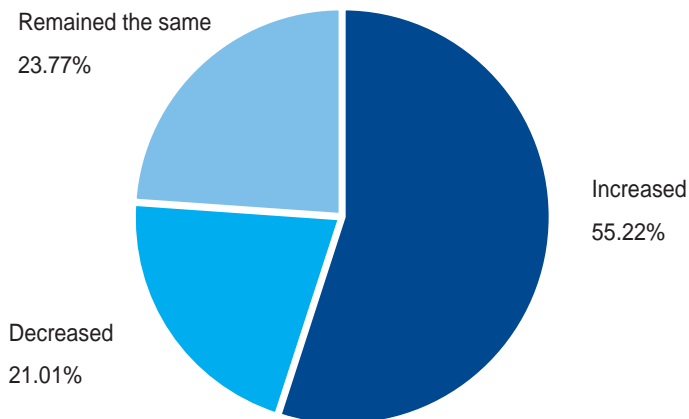
overall findings

- ▷ The survey shows a significant decline in predicted business growth compared to last year and this is no doubt indicative of the current state of the global financial crisis. 45.00% of the total respondents indicated that they believe that their company's growth increased in the last financial year.

comparison to the 2008 results

This compares to 82.23% in the 2008 results who indicated that business activities and growth had increased.

what expectations of your company's activities or growth next financial year compared to this year?



overall findings

- ▷ 55.22% of the total respondents indicated that they believe that their company's growth will increase in the next financial year.

comparison to the 2008 results

This compares to 82.36% in the 2008 results who predicted that business activities and growth would increase.

what do you understand to be your company's staff turnover by percentage?

overall findings

- ▷ 37.41% of the total respondents believe that staff turnover is less than 5%.
- ▷ 26.54% of the total respondents believe that staff turnover is as much as 10%.

influence of corporate social responsibility

new: is corporate social responsibility (csr) a focus for your company?

overall findings

- ▷ 69.88% of the total respondents believe that Corporate Social Responsibility (CSR) is a major focus of their organisation.

new: do you believe your company should have a csr program?

overall findings

- ▷ 45.60% of the total respondents believe that their company should have a CSR program.

new: does your company measure a return on investment (roi) on csr program(s)?

overall findings

- ▷ 31.64% of the total respondents indicated that their company does not measure ROI on their CSR programs.

new: what do you believe are the main obstacles for your company not developing a csr program?

overall findings

- ▷ 30.03% of the total respondents believe that cost is a major factor.
- ▷ 30.48% of the total respondents believe that there is lack of Director or Senior Management support.
- ▷ 35.39% of the total respondents believe that there is lack of shareholder support.
- ▷ 39.05% of the total respondents believe that it is in fact lack of employee support.

has climate change had a positive or negative impact on your business or no impact at all?

overall findings

- ▷ 71.48% of the total respondents believe that Climate Change has had no impact on their business.
- ▷ This compares to 64.89% in the 2008 results who believed that Climate Change had no impact on their business.



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