



LOGISTICS INDEX REPORT

Q4 2021



[CartonCloud.com](https://www.cartoncloud.com)

Foreword

After nearly two years of global supply chain disruption, unprecedented rise in demand, and new industry regulations in response to the worldwide pandemic; the Australian Logistics Industry has emerged with optimism and growth.

Welcome to the fourth edition of the quarterly CartonCloud Logistics Index (CCLI), exploring industry insights, trending issues, and business outlooks to provide actionable data to logistics businesses and industry decision-makers planning for the year ahead. Each quarter we open the CCLI survey to all members of the Australian Logistics Industry to share their insights and generate actionable data.

The CCLI offers an opportunity to share data with our industry, drawn from members across the country, from various businesses and roles. In this report, we observe the most positive sentiment to date from the Australian Logistics Industry, reflect on what worked last quarter to prepare for the demand boom of the holiday season and explore what activities businesses are planning to undertake for growth in the coming year.

This quarter examines the top activities companies offer to customers to support supply chain stability and the most popular data and reporting requested by customers. Finally, with hiring optimism soaring, we look at the top skills businesses seek in hiring rounds.

If this is your first introduction to the CartonCloud Index Report, welcome. To our return respondents and readers, welcome back. Thank you for your ongoing support.

Vincent Fletcher
Founder, CartonCloud





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CARTONCLOUD LOGISTICS INDUSTRY SENTIMENT INDEX

The CartonCloud Logistics Index is a finger on the pulse of the logistics industry — gathering insights and opinions from members of the industry, across all services and roles.

The CCLI tracks sentiment changes and trends across three core themes; economic outlook, growth potential and hiring likelihood — and each quarter explores trending topics and current issues impacting our industry, to provide greater context and build deeper insights into what matters most to our industry.

The 2021 Q1 index has been benchmarked as 100 and provides the baseline for tracking future changes. The first three questions are the same each quarter, allowing us to accurately track sentiment changes over time.



THE INDEX — HOW IT WORKS

The CartonCloud Logistics Industry sentiment index is calculated based on responses to the following three questions, which are included in every quarterly survey:

- 1. How do you expect your business to perform in the next six months?**
- 2. What is your view of the current economic climate for your business?**
- 3. Based on the economic climate and the performance of your business, how would you rate the likelihood that your business will bring on additional staff within the next six months?**

METHODOLOGY

The survey asks participants to respond to each question on a 1-5 scale, from very poor to very good. Responses for the first three questions in the quarterly survey are combined (business conditions, growth prospects and hiring plans) based on the response values (very good = 5, to very poor = 1) to calculate the overall index value. The relative scores across these three questions are combined and compared over subsequent periods.

An index of 100 indicates that overall sentiment is the same as the baseline from Q1 2021. An index of greater than 100 shows that optimism is higher than Q1 2021, and likewise, an index of less than 100 indicates that pessimism is more prevalent than Q1 2021.





RESULTS Q4 2021

THE AUSTRALIAN LOGISTICS INDUSTRY IS ENTERING 2022 WITH HIGH SENTIMENT, POSITIVE ECONOMIC OUTLOOK AND SOARING HIRING OPTIMISM.

The fourth quarter of 2021 saw the highest e-commerce and logistics demand on record. This follows a year of growth, as the global logistics industry met a booming rise in demand.

93% of respondents in senior management roles hold a positive growth outlook for the coming six months. 2021 saw logistics companies build capacity through adopting new technology, additional services and expanding staff and fleet resources.

BUILDING CAPACITY

Looking to the year ahead, companies are planning to invest in technology (either implementing new systems or ensuring they are getting the most from the systems they have), optimising operations, and focusing on sales and marketing activity to increase their customer base.

SUPPLY CHAIN STABILITY

Over recent years, global supply chains have experienced bottlenecks, delays and other issues — resulting in a renewed focus and emphasis on building supply chain stability for customers and wider markets. We asked respondents to share how their companies are helping to provide supply chain stability for their customers — the most common services offered were storage flexibility, tracking and a single point of contact.

TECHNOLOGY ADOPTION

Technology for data automation and robotic operations are becoming more prevalent across all avenues of the industry. Although respondents are expecting data and robotics to become more important, only 10% said they were intending to hire staff with robotics/ computer tech skills, indicating that expectations are for user friendly systems that can integrate seamlessly into the day to day operations to optimise outputs.

HIRING AND INDUSTRY SKILLS IN HIGH DEMAND

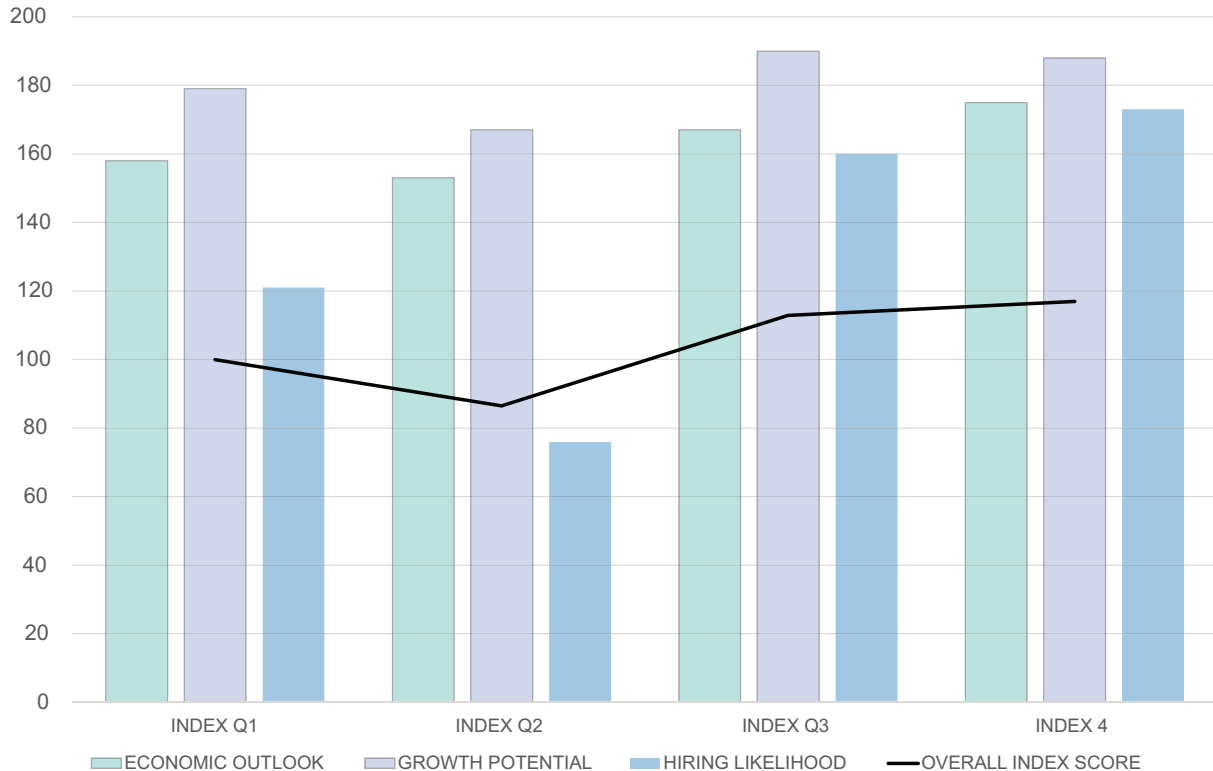
With hiring optimism again booming (after a steady rise throughout the year), companies are seeking roles grounded in industry experience and industry expertise. Multi-licenced drivers, experienced warehouse operators and supply chain management were the top sought after roles across the industry.

WANT MORE?

View the full report, with responses to individual questions below.



TRACKING LOGISTICS INDUSTRY SENTIMENT ACROSS 2021



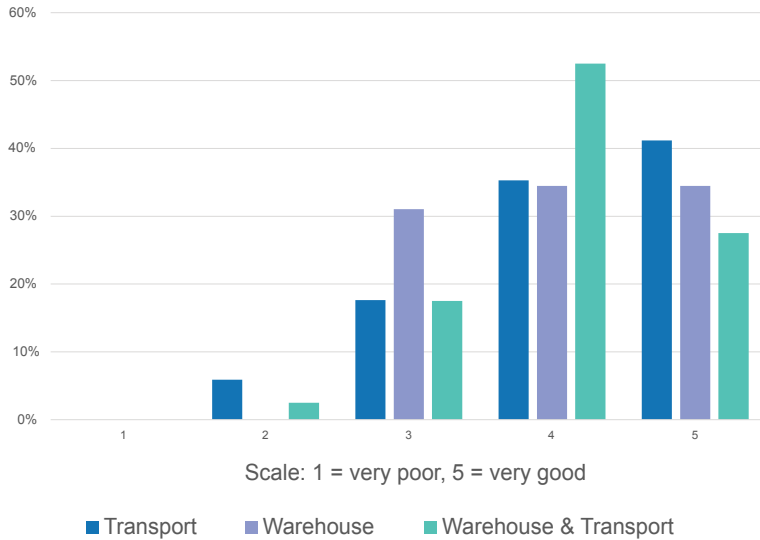
CartonCloud Logistics Index (CCLI)

Logistics businesses recover from the 2021 busy season to move into 2022 with high industry sentiment across the board — and hiring expectations soaring.

Sentiment for the current economic climate and hiring potential in the coming months is trending higher than in previous quarters. As industry demand settles following the holiday rush, we see slightly lower optimism for business growth for the next six months.

Looking forward to the first half of 2022, we can see industry optimism for hiring potential at the highest score of the year to date.

CURRENT ECONOMIC CLIMATE PERCEPTIONS BY INDUSTRY

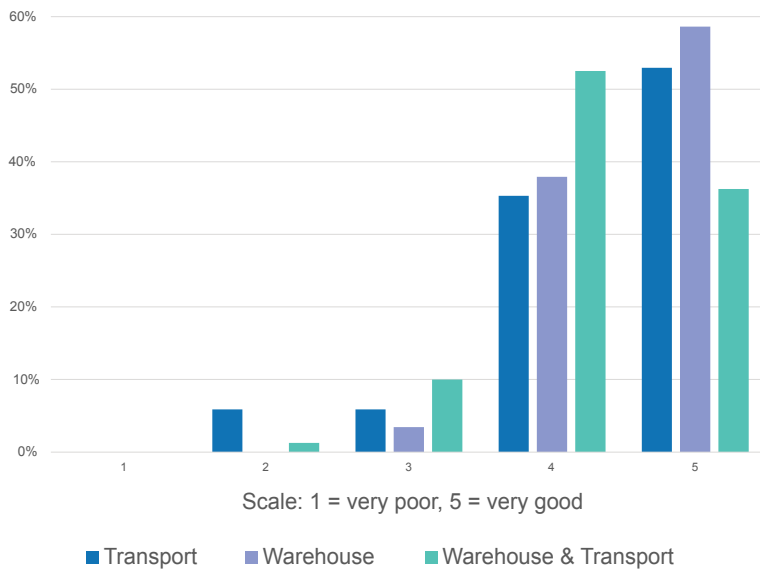


Current economic outlook

Industry optimism for the current economic climate has remained high, with an increase in optimism from Transport industry respondents for Q4.

In this quarter, Transport respondents had the greatest positive shift, from 40% of responses as good/very good in Q3, to 76% in Q4. Warehouse economic outlook responses were consistent with previous quarters, ranging equally between neutral to very good, with no negative responses.

BUSINESS GROWTH EXPECTATIONS BY INDUSTRY

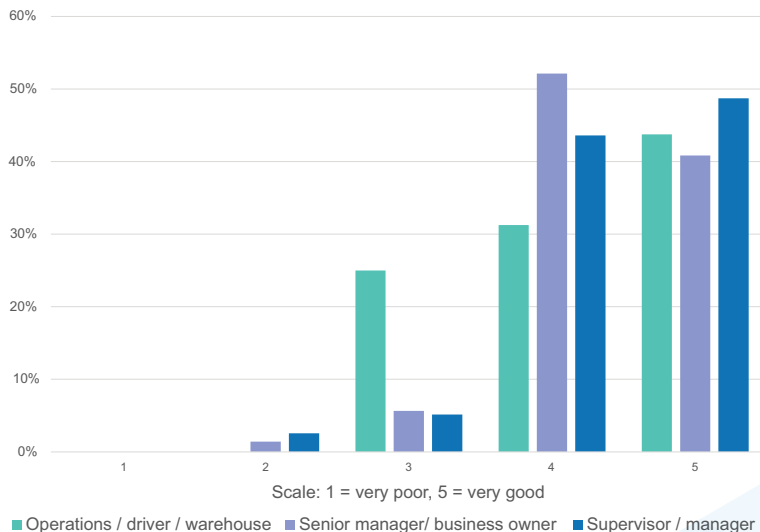


Expectations for business performance in the next six months

For the first time this year, the overall index score for business growth optimism dropped.

This quarter saw a small number of negative responses, while last quarter there were none. Despite the overall drop, this quarter also saw a significant increase in optimism held by Warehouse respondents (from 60% positive responses in Q3 to 97% in Q4).

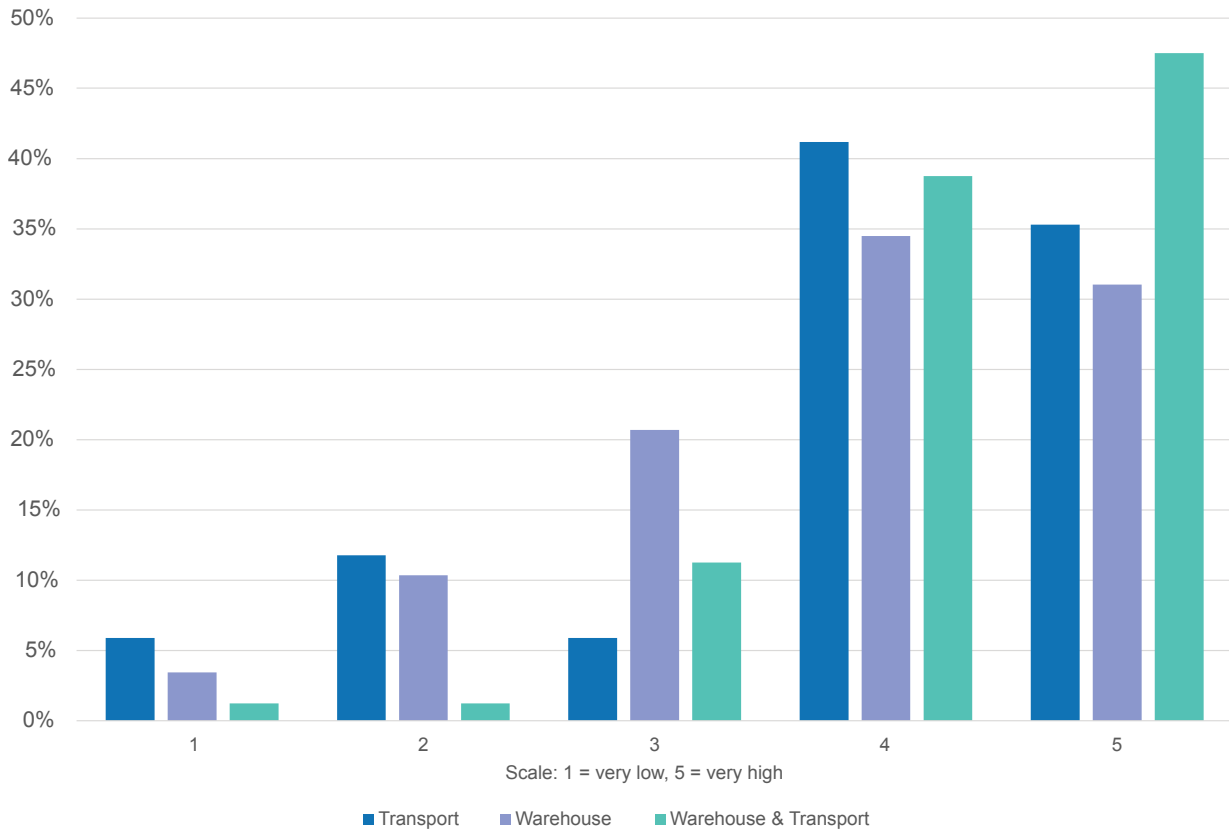
BUSINESS GROWTH EXPECTATIONS BY ROLE



Higher business growth optimism held by senior management than operation staff.

Senior management responded with a 93% positive outlook (responses of high or very high), and supervisors/managers with 92%.

HIRING EXPECTATIONS BY INDUSTRY



Hiring potential in coming six months, based on the current economic climate and business performance

Following sustained high confidence throughout 2021, business optimism to commit to additional staff in 2022 is high.

Respondents from combined Warehouse/Transport operations showed the highest optimism for the coming months, with 86% of positive responses (responses of high or very high).

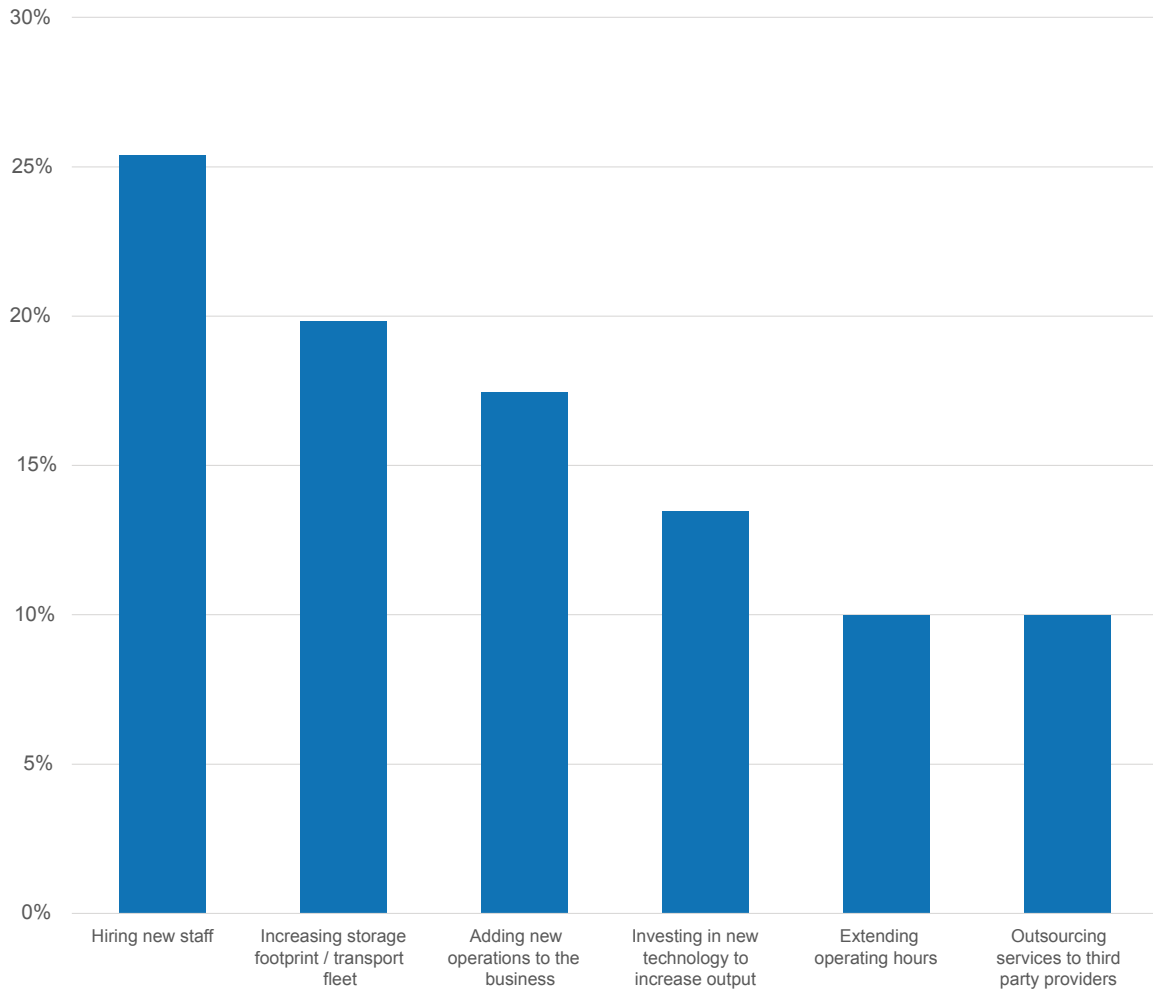
Warehouse respondents had the lowest likelihood to add additional staff, with a significantly lower positive response than other industry types (66%) coupled with a prominent

negative response rate (14%). This may be a result of high hiring activity in previous months to meet busy season demand, or lower demand expected in the start to 2022.

Later in this report, we explore the desired skillsets from across the industry, with the majority of Warehouse respondents seeking experienced warehouse staff, multi-licenced drivers and unskilled workers.



ACTIVITIES TO BOOST CAPACITY



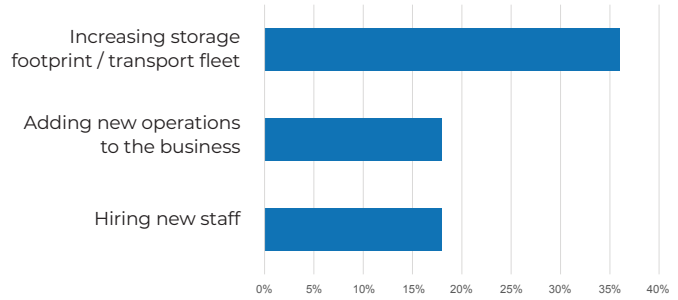
Looking back on what worked in the previous quarter, boosting resources was seen to be a top priority in building capacity for the busy season.

What was the most valuable activity your company undertook last quarter to enable you to increase capacity and overcome issues?

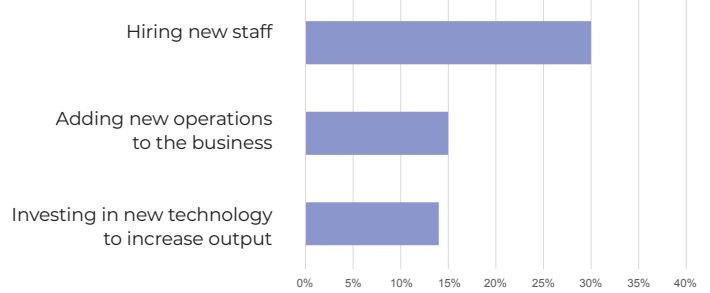
Hiring new staff was ranked as the topmost valuable activity businesses undertook last quarter to boost capacity and prepare for the busy season. This was followed closely by increasing storage footprint/transport fleet and adding new operations to the business.

For Transport respondents, extending operation hours ranked as one of the most valuable activities. While Warehouse respondents saw outsourcing to third parties, and combined Warehouse/Transport companies saw investing in new technology as other key initiatives to build capacity and meet demand over the busy season.

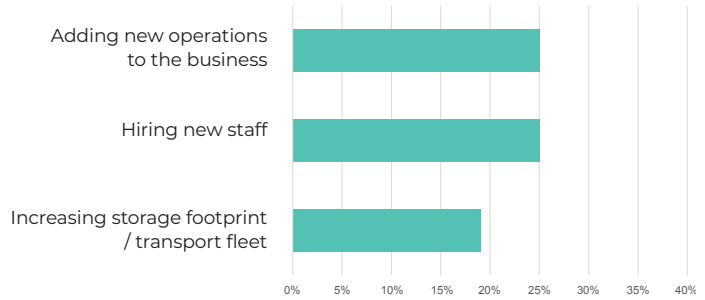
**ACTIVITIES TO BOOST
CAPACITY FOR
SUPERVISOR/MANAGER
JOB ROLE**



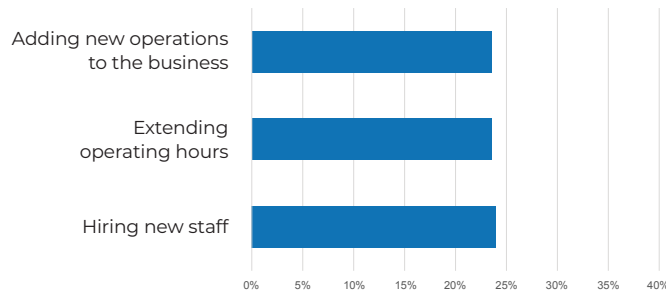
**ACTIVITIES TO BOOST
CAPACITY FOR
BUSINESS OWNER
JOB ROLE**



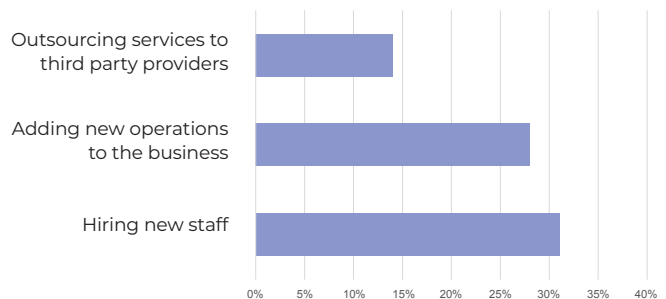
**ACTIVITIES TO BOOST
CAPACITY FOR
OPERATIONS JOB ROLE**



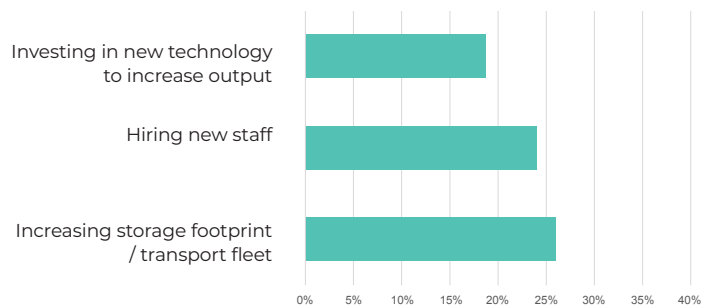
**ACTIVITIES TO BOOST
CAPACITY FOR THE
TRANSPORT INDUSTRY**



**ACTIVITIES TO BOOST
CAPACITY FOR THE
WAREHOUSE INDUSTRY**



**ACTIVITIES TO BOOST
CAPACITY FOR THE
WAREHOUSE/TRANSPORT
COMBINED INDUSTRY**



Data-led planning, optimised workflows and new customer acquisition the top priorities for 2022.

What actions or investments are you looking at making to prepare your business for growth in the coming 12 months?

Looking to the new year, companies are planning on investing in technology, optimising operations to prepare for new business in the year ahead, with a focus on sales and marketing to increase their customer base.

Alongside data-driven planning aiming to optimise resources and increase capacity, increasing fleet and warehouse storage was still a significant response in the most valuable actions to prepare for business growth.

TECHNOLOGY INVESTMENT MUST BE 'THE RIGHT FIT'

When reflecting on the actions that made the most impact last quarter, only 13% of respondents saw 'investing in new technology to increase output' as a valuable activity in boosting capacity. When asked what investments companies were looking at undertaking for the coming year, many respondents already had a system or technical solution in place — but are looking to get more value from their existing solutions.

DATA-DRIVEN PLANNING

Some respondents took a multi-faceted approach in their use of technology, investing in technology to streamline operations on the go — as well as using business intelligence data to forecast for the future. This way, they can optimise the resources they have on hand, while having the foresight to predict when additional staff or resources may be required for times of high demand.

“ We’re looking to use data more effectively to plan for what we need, when we need it. ”

— Combined Warehouse/Transport operations.

GROWTH PLANNING — CUSTOMER ACQUISITION AND RETENTION

In planning for growth in the new year, many respondents highlighted a focus on customer retention and acquisition; looking at how to keep their current customer base happy, and gain new customers through marketing and sales.

FLEET AND STORAGE CAPACITY

Increasing fleet, storage space and hiring new staff remains an integral part of planning for the year to come. Exploring opportunities to optimise the resources companies have on hand was another high-value activity for the coming year.

Through implementing new technologies, systems and automation, companies were looking to save time on operations and boost the capacity of staff, fleet and storage space based on data-driven forward planning and business intelligence. Many respondents also coupled planning to increase their fleet or hire new staff, with data-analysis, to project new customers or busy periods when this would become essential.

Customers are seeking greater information and flexibility from logistics partners to handle delays, bottlenecks, and build supply chain stability.

What services do you offer customers in order to help them build supply chain resilience?

Recent years have seen the rise of e-commerce driving changes in shipper and customer expectations — while global supply chains have managed to overcome bottlenecks, delays and other issues as a result of the global pandemic and industrial actions.

We asked respondents to share the services they offer customers now, and what customers are asking for. The top-scoring services our respondents currently provide to build supply chain resilience included; one point of contact for multiple services (35%), customer access to tracking and delivery updates (33%) and sufficient storage to provide inventory buffer (30%).



INVENTORY BUFFER

Providing an inventory buffer to avoid potential delays and bottlenecks and allow greater flexibility in fulfilment of adhoc orders or changes in demand was a popular service businesses offered to customers.

Many respondents also listed providing reliable analytics and data analysis as a key service, to assist customers in forward planning stock levels and locations, which could also assist with managing the flow-on costs of additional storage.

REPORTING AND TRACKING

For 3PL and Transport companies, many customers are seeking greater communication and information on last-mile logistics, including tracing and delivery ETAs. This was also reflected in the planning activities listed in question 4, with many companies looking at implementing software solutions with customer integrations, tracking and automated reporting, sign on glass etc.

ONE POINT OF CONTACT

Finally, in an industry with so many moving parts, a key factor logistics companies are offering for supply chain stability is to have one point of contact for multiple services. While actions such as outsourcing to third parties was a key activity listed in dealing with increased capacity, having clear information between partners, to provide one single point of contact for customers remains a key priority in delivering greater supply chain stability. Companies may also be offering more services under one point of contact, including direct customer relations, or adding delivery or storage services.

“ We are looking to increase our direct to customer distribution. We send wine usually on pallets DC’s but have been getting more involved in individual cartons direct to customers. ”

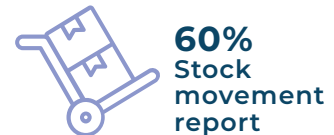
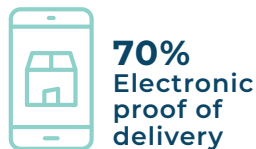
— Trafford Harris, Pallet and Barrel.

Reporting for the modern industry — what is the new norm?

What reporting or data analysis do you offer to your customers?

The gap between B2B and B2C reporting expectations has narrowed significantly in recent years, with data and reporting expectations growing — especially in last-mile providers. Industry giants have set standards that have influenced customer expectations and put pressure on providers to meet. In response, many small-medium logistics businesses are increasing reporting and data-analysis services offered.

Across the sector, the top reporting services provided to customers or supply chain management were;



Times are changing, and expectations are changing too. We asked our respondents what other reporting services their customers have requested.

WHAT ARE PROVIDERS OFFERING?

For both Warehouse and combined Warehouse/Transport company respondents the top reporting services offered were; stock level report, stock movement report and issue/damaged stock report.

The most common reportings services provided by Transport companies included; driver location tracking, time from dispatch to delivery and electronic proof of delivery.



WHAT ELSE ARE CUSTOMERS ASKING FOR?

There is a desire for real-time reporting and data, to assist the customer in their own future stock and sales planning, reporting on time taken to complete a task or delivery, weekly/ fortnight outputs, charge breakdowns, stock and consumable usage reports, and delivery estimates.

Timeframe reporting was another popular request; including pick and packing time reports, order to dispatch timing, last-mile delivery, number deliveries made within a certain time frame etc.



Stock level report



Delivery estimate

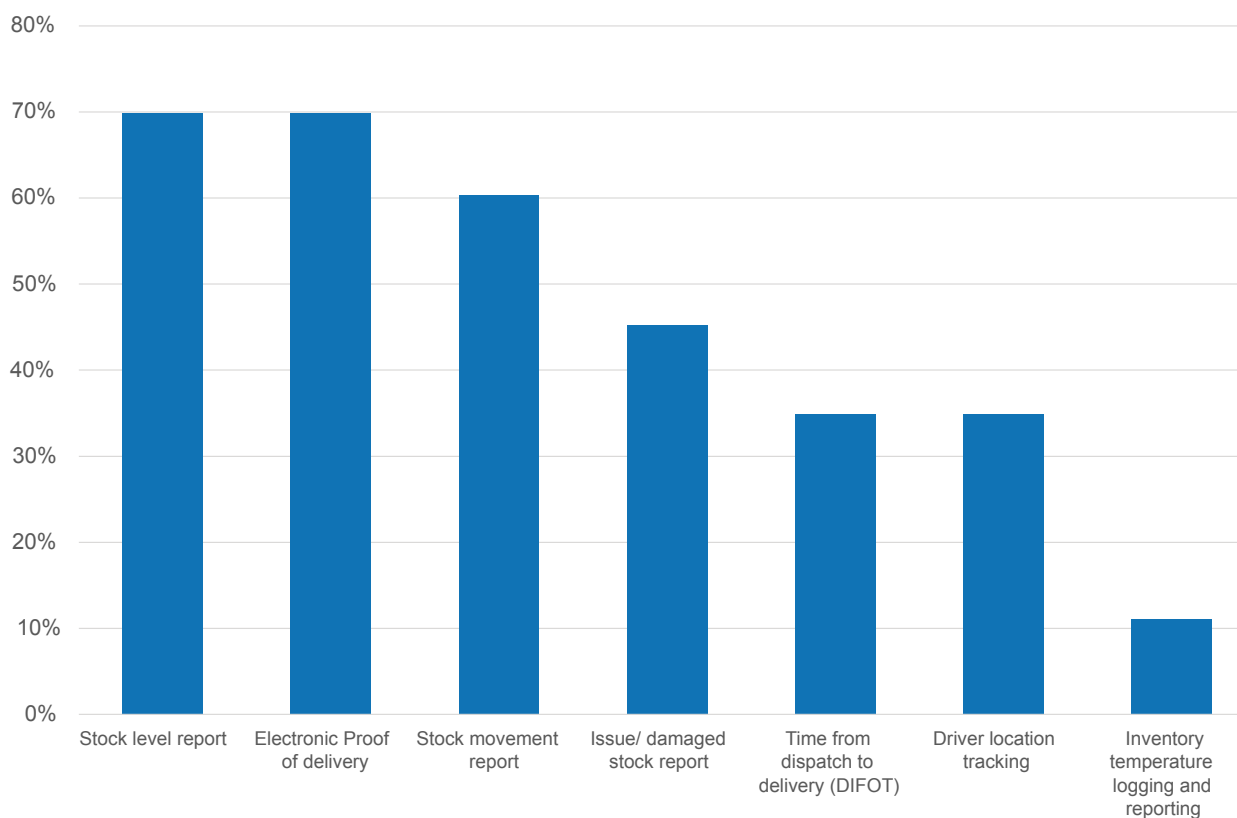


Timeframe reporting



Charge breakdowns

CUSTOMER REPORTING AND DATA ANALYSIS



As hiring optimism booms, companies seek industry experience and expertise.

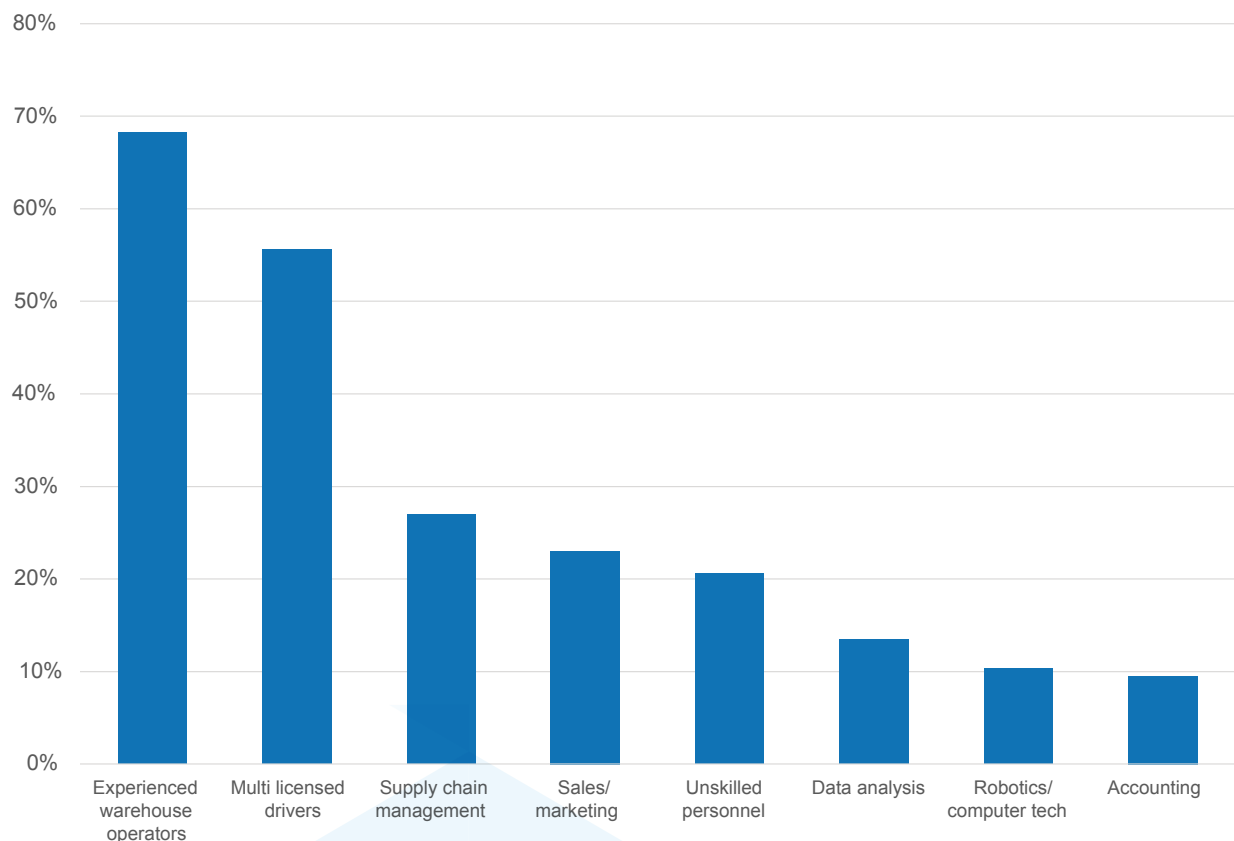
Recent international and local industry news has expressed concerns over driver shortages, contemplated the skills required for emerging roles in logistics technology and robotics, and explored the role of strategic leadership for global supply chain management and stability.

As our industry develops and responds to changing expectations, consumer trends and technological developments, the CCLI has tracked hiring sentiment across the year. The Australian industry saw high hiring optimism each quarter — peaking at the end of the year with Q4's results.

Optimism was especially high this quarter for combined Warehouse/Transport respondents and respondents in senior management roles. We asked respondents to share the skills they are looking for when hiring.

If you were to bring on new staff, what skills are you seeking to add to your company?

DESIRED SKILLS FOR NEW HIRES

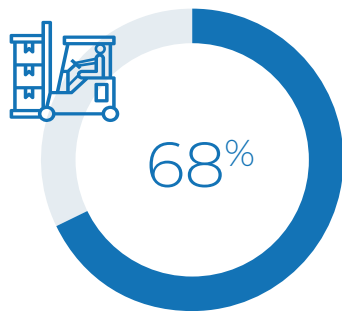


INDUSTRY EXPERTISE TOP OF THE LIST

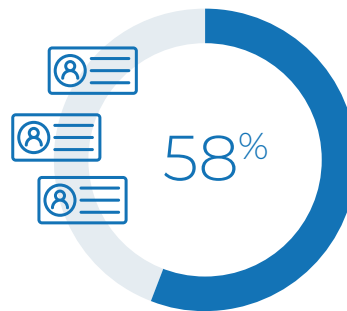
The top skills logistics businesses are seeking are experienced warehouse operators (68%), multi-licensed drivers (56%) and supply chain management (27%). These top skills were followed closely by sales and marketing (23%), unskilled personnel (21%) and data analysis (13%). The lowest priority skills based on respondents from this quarter were robotics and computer tech and accounting, both with 10%.

TECHNOLOGY ASSIMILATION SHOULD BE SIMPLE

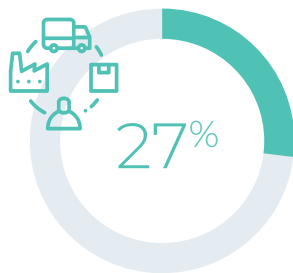
While data automation and robotics operations technology are becoming more prevalent across all avenues of the industry, the results suggest this technology is expected to be user-friendly, and integrate seamlessly with existing operations — rather than requiring the hiring of staff with robotics or accounting skills.



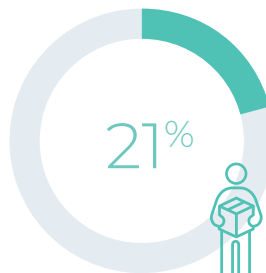
Experienced warehouse operators



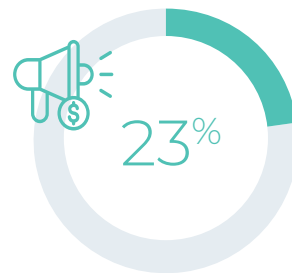
Multi licensed drivers



Supply chain management



Unskilled personnel



Sales/ marketing



Data analysis



Accounting



Robotics / computer techs





SUMMARY

The final quarter of the year saw industry optimism boom, with the highest sentiment index of the year.

Looking back to the most valued actions for boosting capacity, and planning ahead for the year to come; hiring new staff and increasing operational fleet/storage space came in at the top of the list. In terms of hiring, the most sought after skills sets were those with industry experience and expertise, with sales and marketing coming in after.

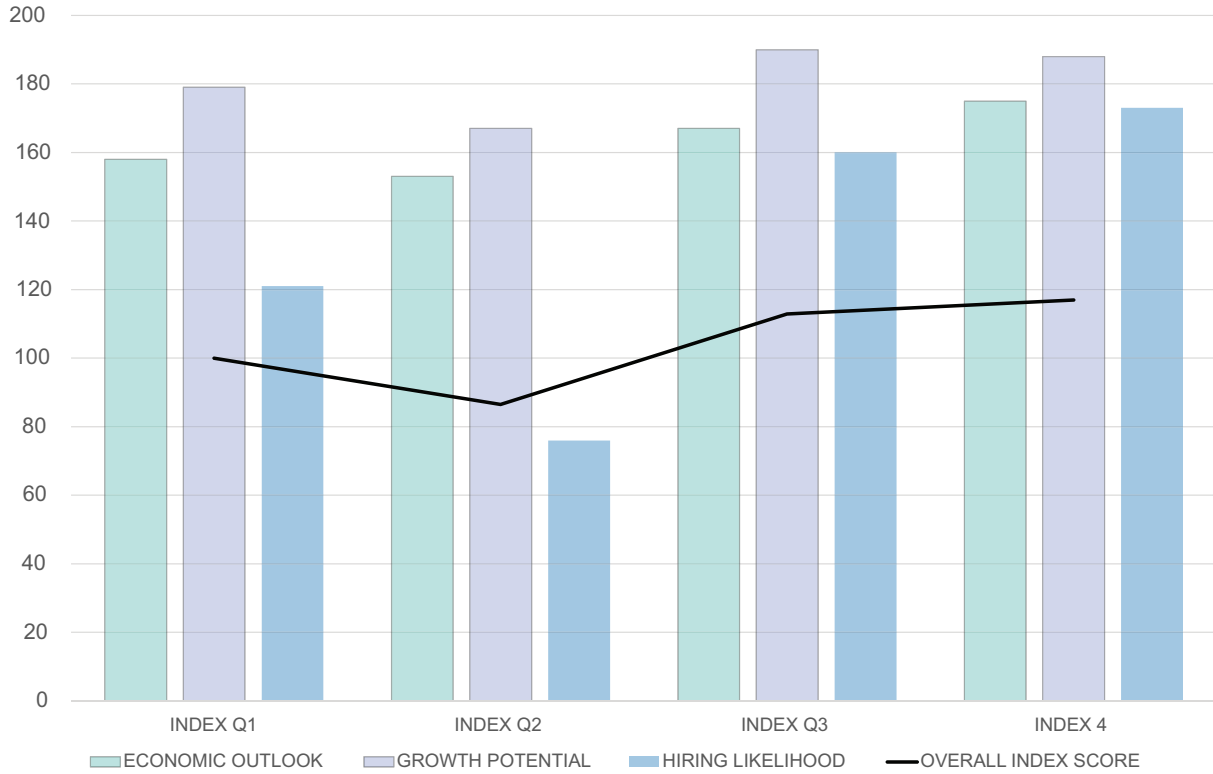
While many companies were looking to implement new technologies or enhance their use of available features in the coming year, they did not list specific skillsets for robotics as a leading requirement; suggesting new technology is expected to be easy to use and reflect the current workflows of the industry.

Companies are working to provide greater stability to customer supply chains by providing real-time reporting, data analysis and simple customer communication across services. While these services are offered, many customers are also seeing greater last-mile tracking and reporting, and time management reporting from logistics providers.



APPENDIX

CARTONCLOUD LOGISTICS INDEX SENTIMENT TRACKING 2021



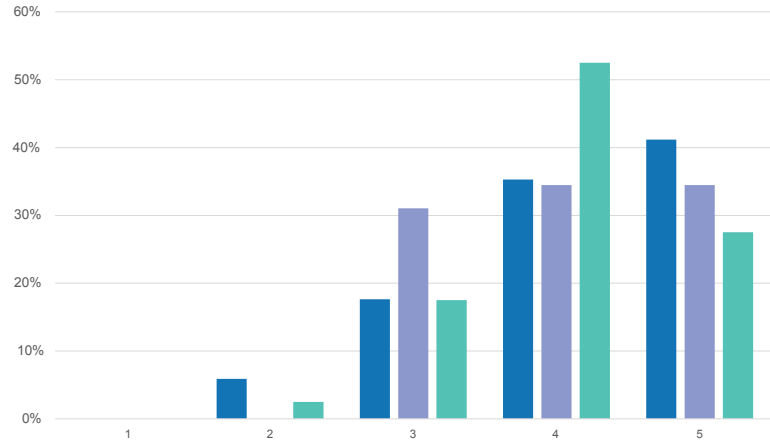
	INDEX Q1	INDEX Q2	INDEX Q3	INDEX 4
Question 1	158	153	167	175
Question 2	179	167	190	188
Question 3	121	76	160	173
Overall Index Score	100	86	113	117

Question 1:

What is your view of the economic climate for your business?

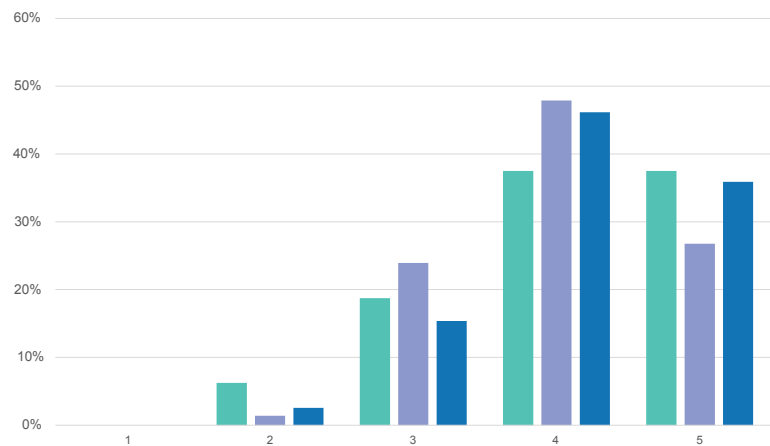
(1= very poor, 5=very good)

CURRENT ECONOMIC CLIMATE PERCEPTIONS BY INDUSTRY



	1	2	3	4	5
Transport	0%	6%	18%	35%	41%
Warehouse	0%	0%	31%	34%	34%
Warehouse & Transport	0%	3%	18%	53%	28%

CURRENT ECONOMIC CLIMATE PERCEPTIONS BY ROLE



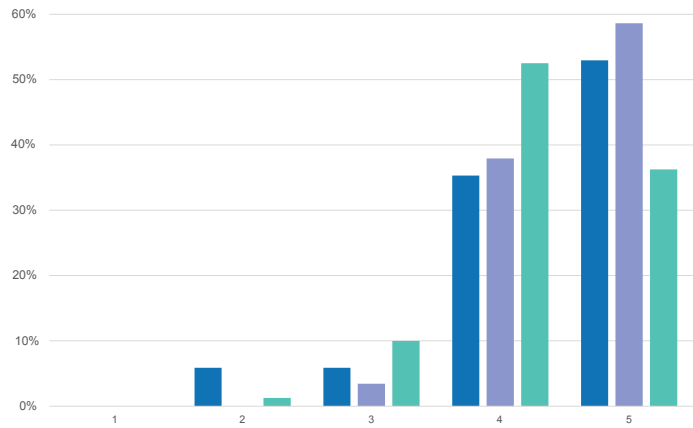
	1	2	3	4	5
Operations / Driver / Warehouse	0%	6%	19%	38%	38%
Senior Manager/ Business Owner	0%	1%	24%	48%	27%
Supervisor / Manager	0%	3%	15%	46%	36%

Question 2:

How do you expect your business to perform in the next six months?

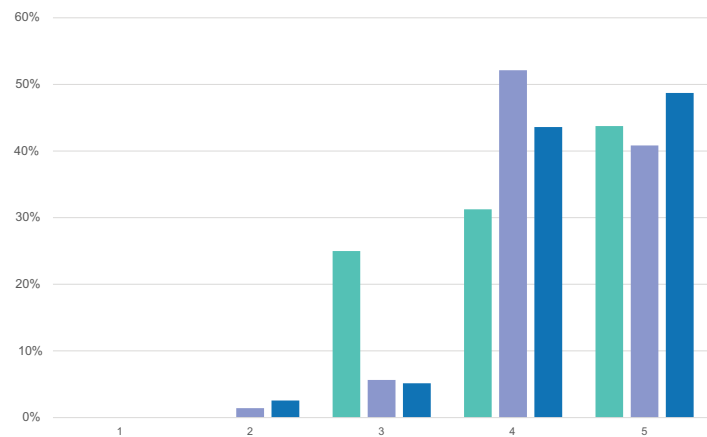
(1= very poor, 5=very good)

BUSINESS GROWTH EXPECTATIONS BY INDUSTRY



	1	2	3	4	5
Transport	0%	6%	6%	35%	53%
Warehouse	0%	0%	3%	38%	59%
Warehouse & Transport	0%	1%	10%	53%	36%

BUSINESS GROWTH EXPECTATIONS BY ROLE

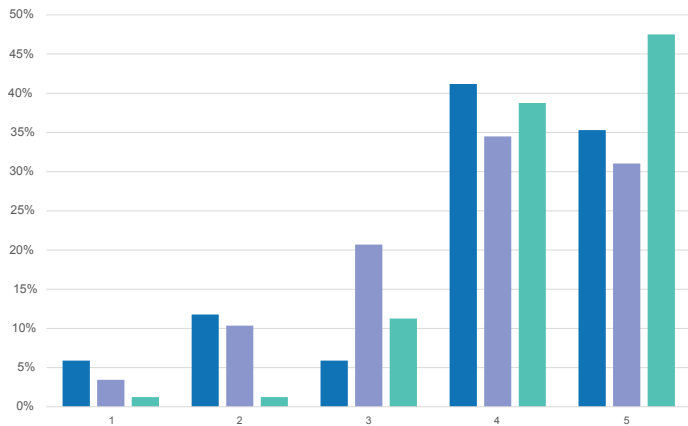


	1	2	3	4	5
Operations / Driver / Warehouse	0%	0%	25%	31%	44%
Senior Manager/ Business Owner	0%	1%	6%	52%	41%
Supervisor / Manager	0%	3%	5%	44%	49%

Question 3:

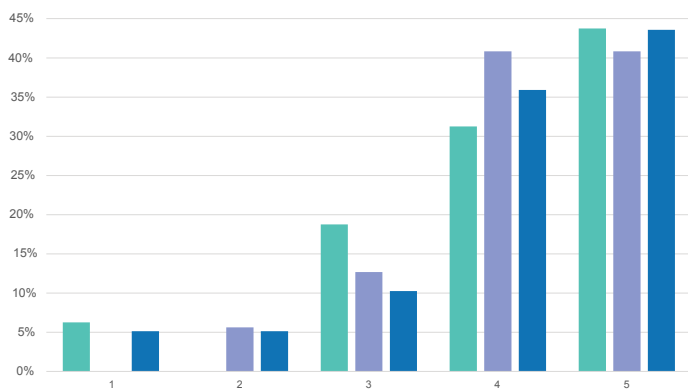
Based on the economic climate and the performance of your business, how would you rate the likelihood that your business will bring on additional staff within the next six months? (1 = very low, 5=very high)

**HIRING EXPECTATIONS
BY INDUSTRY**



	1	2	3	4	5
Transport	6%	12%	6%	41%	35%
Warehouse	3%	10%	21%	34%	31%
Warehouse & Transport	1%	1%	11%	39%	48%

**HIRING EXPECTATIONS
BY INDUSTRY**

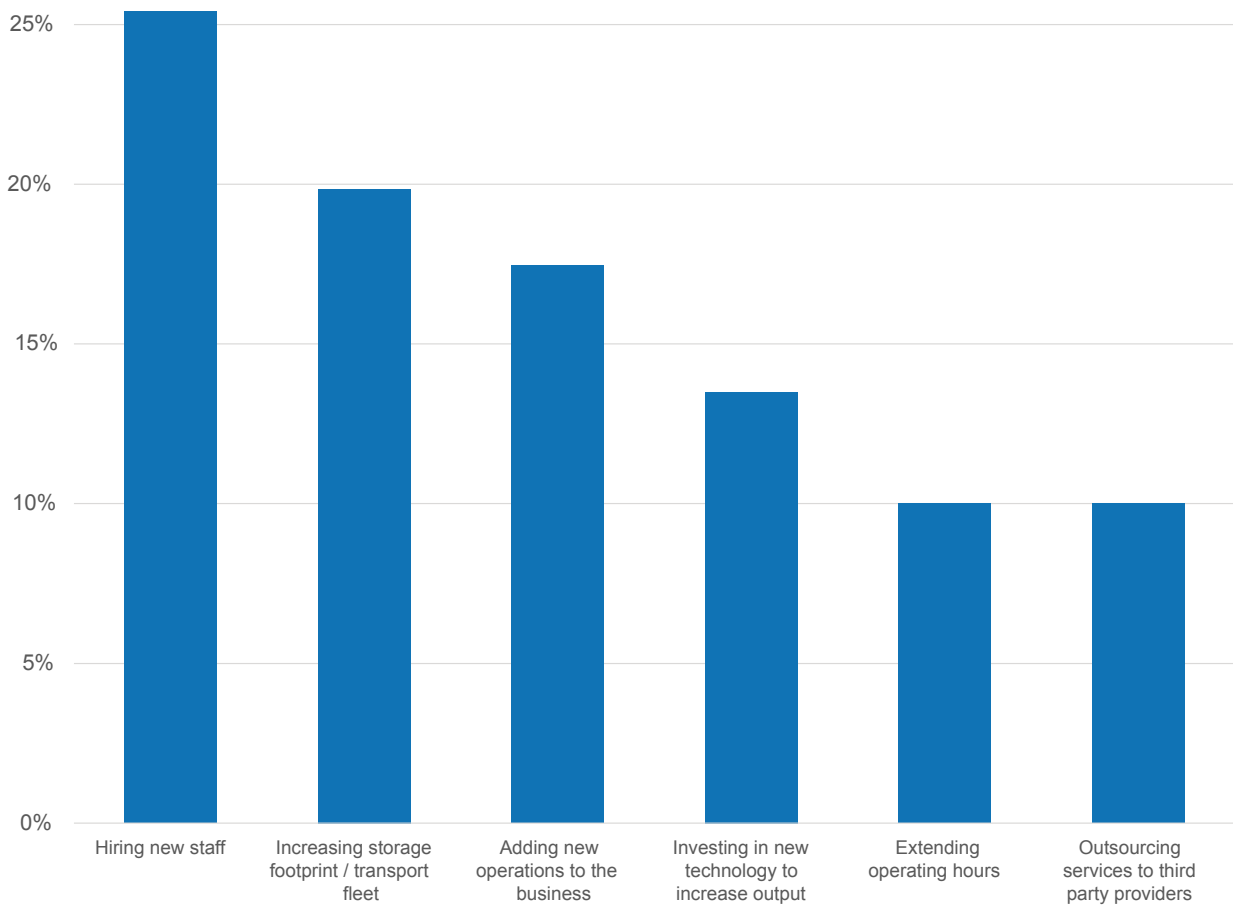


	1	2	3	4	5
Operations / Driver / Warehouse	6%	0%	19%	31%	44%
Senior Manager/ Business Owner	0%	6%	13%	41%	41%
Supervisor / Manager	5%	5%	10%	36%	44%

Question 4:

(a): Looking back, what was the most valuable activity your company undertook last quarter to enable you to increase capacity and overcome issues?

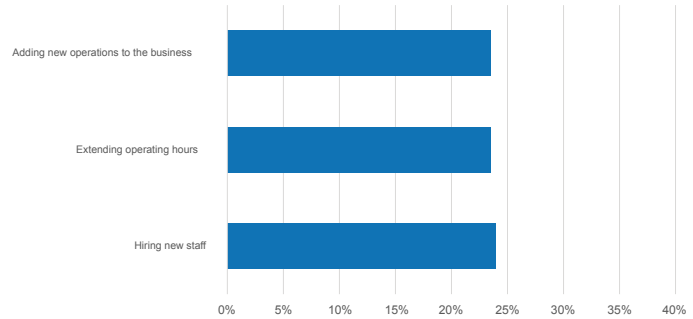
ACTIVITIES TO BOOST CAPACITIES



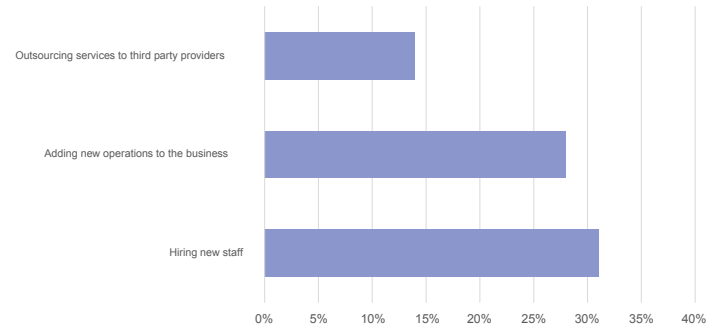
Hiring New Staff	Increasing Storage Footprint / Transport Fleet	Extending Operating Hours	Outsourcing Services to Third Party Providers	Investing In New Technology to Increase Output	Adding New Operationsto The Business
25%	20%	10%	10%	13%	17%

ACTIVITIES TO BOOST CAPACITIES BY INDUSTRY

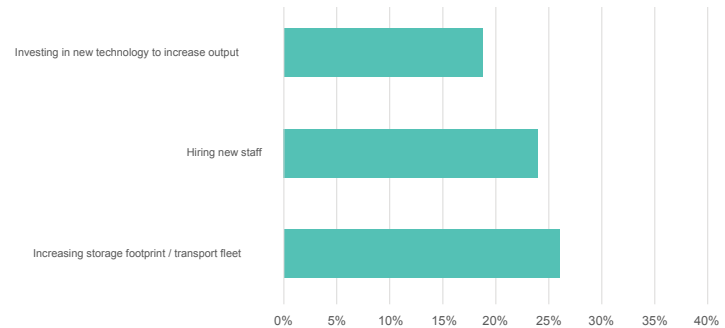
ACTIVITIES TO BOOST CAPACITY FOR THE TRANSPORT INDUSTRY



ACTIVITIES TO BOOST CAPACITY FOR THE WAREHOUSE INDUSTRY



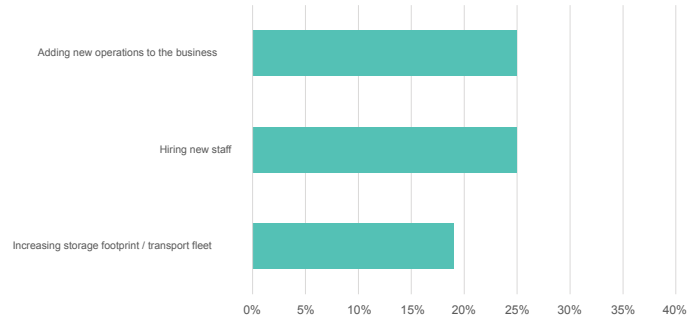
ACTIVITIES TO BOOST CAPACITY FOR THE WAREHOUSE/TRANSPORT COMBINED INDUSTRY



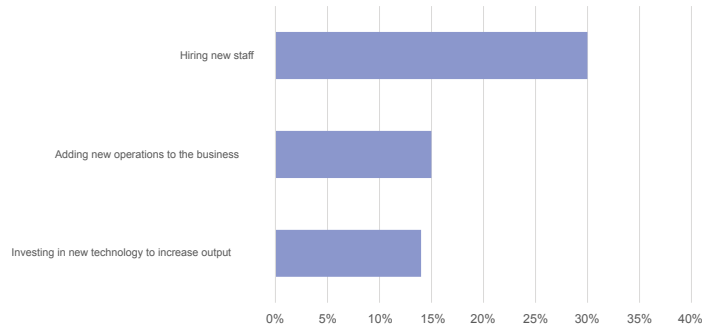
	Hiring New Staff	Increasing Storage Footprint / Transport Fleet	Extending Operating Hours	Outsourcing Services to Third Party Providers	Investing In New Technology to Increase Output	Adding New Operations to the Business
Transport	24%	12%	24%	12%	0%	24%
Warehouse	31%	7%	7%	14%	7%	28%
Warehouse & Transport	24%	26%	8%	9%	19%	13%

ACTIVITIES TO BOOST CAPACITIES BY ROLE

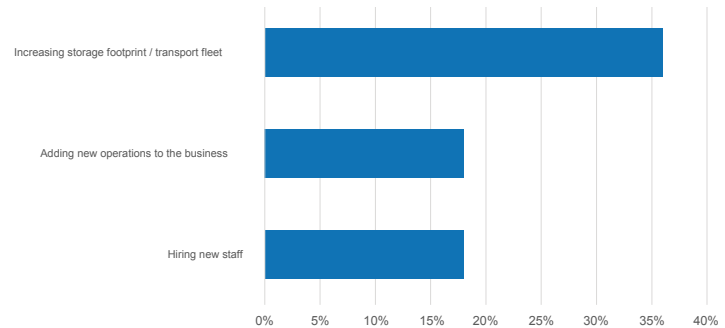
ACTIVITIES TO BOOST CAPACITY FOR OPERATIONS JOB ROLE



ACTIVITIES TO BOOST CAPACITY FOR BUSINESS OWNER JOB ROLE



ACTIVITIES TO BOOST CAPACITY FOR SUPERVISOR/MANAGER JOB ROLE

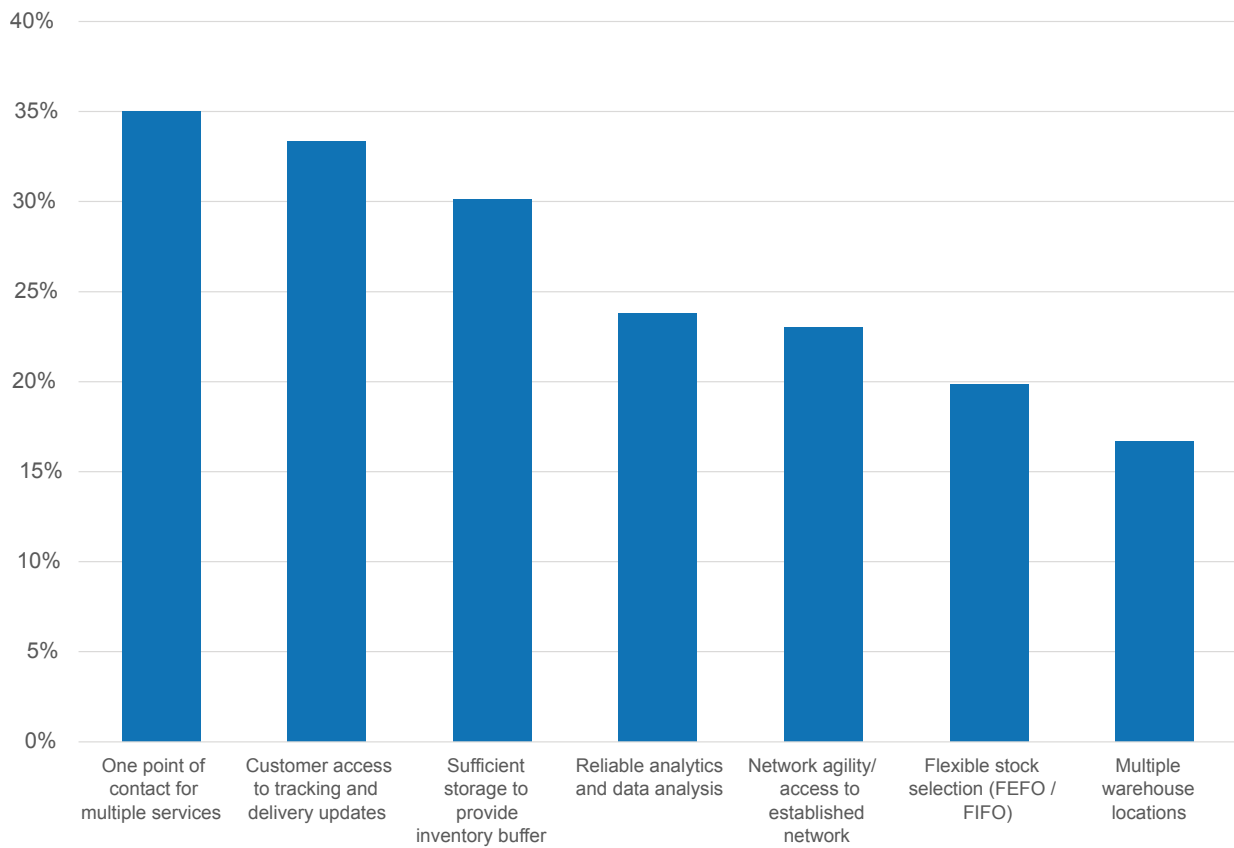


	Hiring New Staff	Increasing Storage Footprint / Transport Fleet	Extending Operating Hours	Outsourcing Services to Third Party Providers	Investing In New Technology to Increase Output	Adding New Operations to the Business
Operations / Driver / Warehouse	25%	19%	6%	13%	25%	24%
Senior Manager/ Business Owner	30%	11%	13%	13%	15%	28%
Supervisor / Manager	18%	36%	5%	5%	18%	13%

Question 5:

What services do you offer customers in order to help them build supply chain resilience?

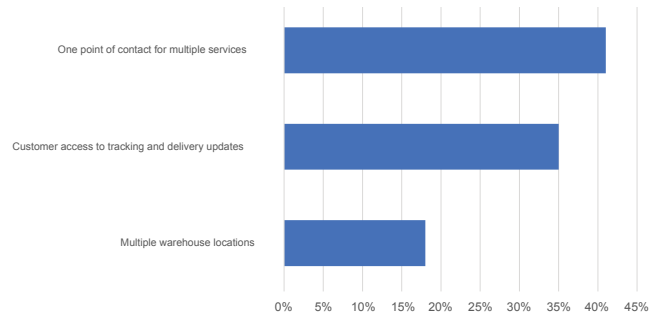
SERVICES TO BUILD SUPPLY CHAIN RESILIENCE



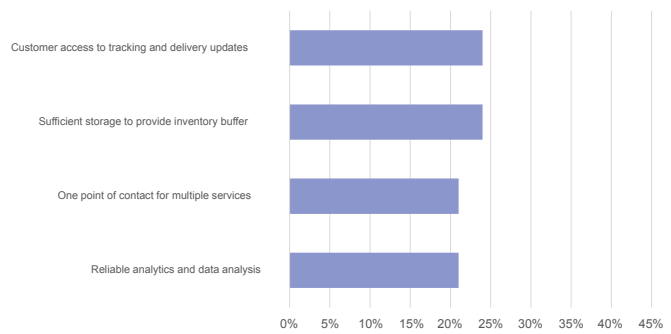
Reliable Analytics And Data Analysis	Sufficient Storage to Provide Inventory Buffer	Flexible Stock Selection (FEFO / FIFO)	Customer Access to Tracking and Delivery Updates	Multiple Warehouse Locations	One Point of Contact for Multiple Services	Network Agility/ Access to Established Network
24%	30%	20%	33%	17%	35%	23%

SERVICES TO BUILD SUPPLY CHAIN RESILIENCE BY INDUSTRY

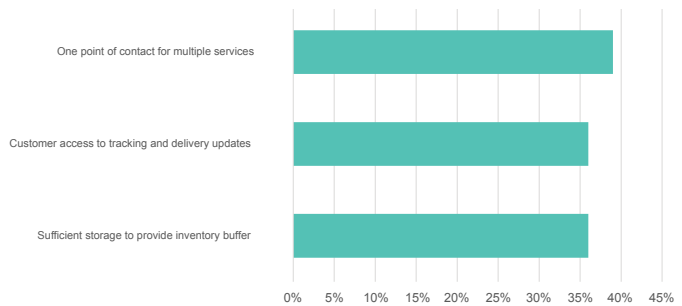
ACTIVITIES TO BUILD SUPPLY CHAIN RESILIENCE FOR THE TRANSPORT INDUSTRY



ACTIVITIES TO BUILD SUPPLY CHAIN RESILIENCE FOR THE WAREHOUSE INDUSTRY



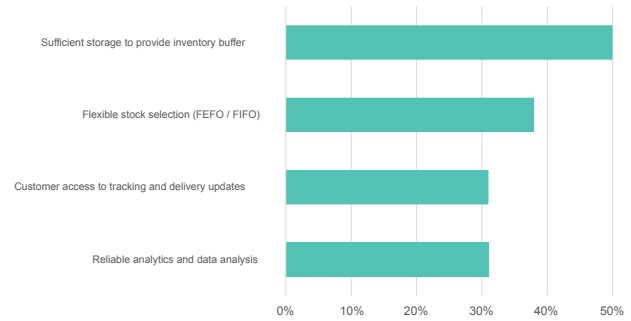
ACTIVITIES TO BUILD SUPPLY CHAIN RESILIENCE FOR THE WAREHOUSE/TRANSPORT COMBINED INDUSTRY



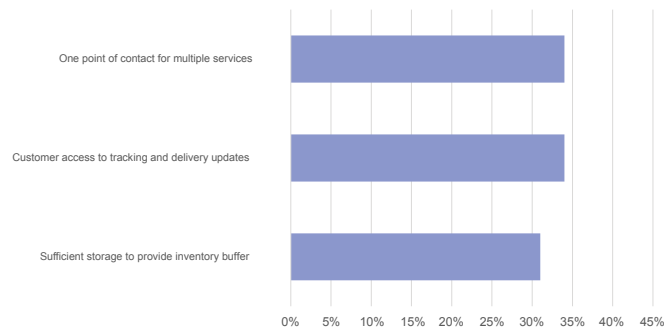
	Reliable Analytics and Data Analysis	Sufficient Storage to Provide Inventory Buffer	Flexible Stock Selection (FEFO / FIFO)	Customer Access to Tracking and Delivery Updates	Multiple Warehouse Locations	One Point of Contact For Multiple Services	Network Agility/ Access to Established Network
Transport	12%	12%	0%	35%	18%	41%	6%
Warehouse	21%	24%	14%	24%	3%	21%	14%
Warehouse & Transport	28%	36%	26%	36%	21%	39%	30%

SERVICES TO BUILD SUPPLY CHAIN RESILIENCE BY ROLE

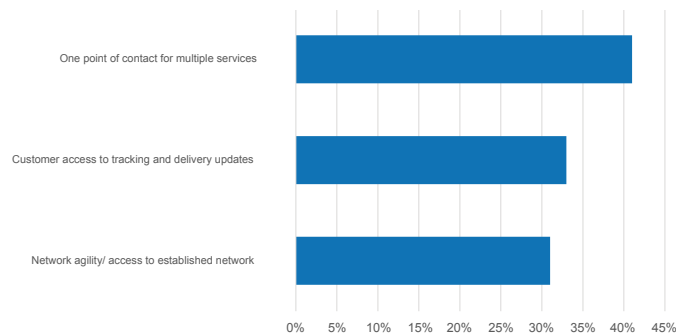
SERVICES TO BUILD SUPPLY CHAIN RESILIENCE FOR OPERATIONS JOB ROLE



SERVICES TO BUILD SUPPLY CHAIN RESILIENCE FOR BUSINESS OWNER JOB ROLE



SERVICES TO BUILD SUPPLY CHAIN RESILIENCE FOR SUPERVISOR/MANAGER JOB ROLE

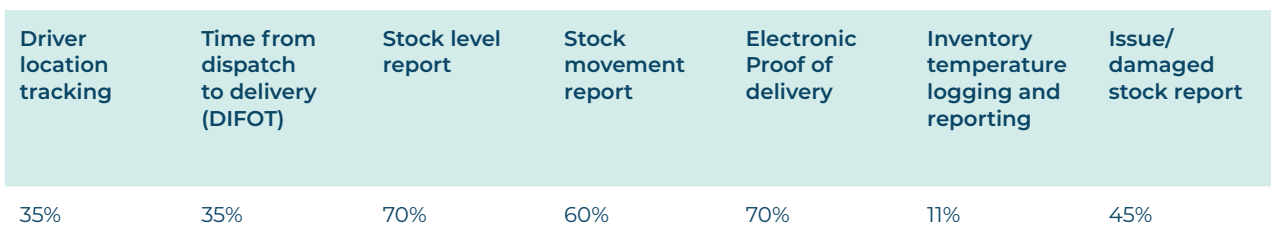
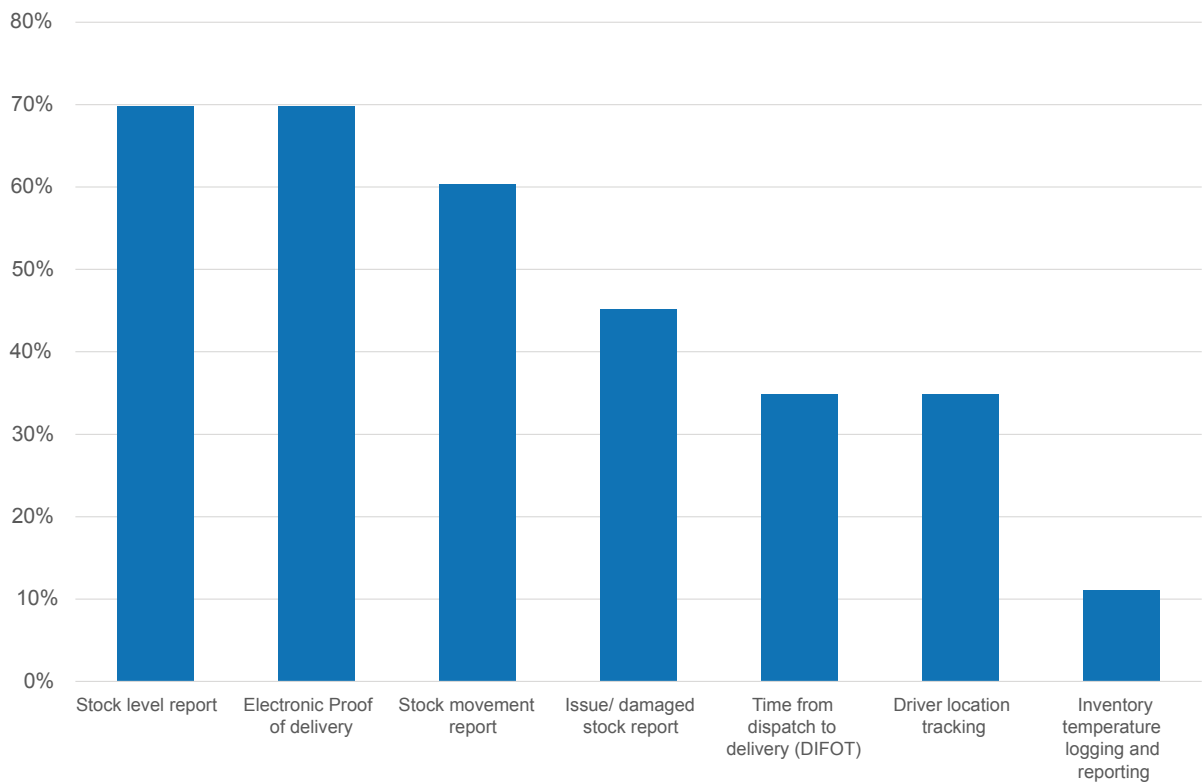


	Reliable Analytics and Data Analysis	Sufficient Storage to Provide Inventory Buffer	Flexible Stock Selection (FEFO / FIFO)	Customer Access to Tracking and Delivery Updates	Multiple Warehouse Locations	One Point of Contact For Multiple Services	Network Agility/ Access to Established Network
Operations / Driver / Warehouse	31%	50%	38%	31%	13%	25%	25%
Senior Manager / Business Owner	23%	31%	20%	34%	17%	18%	18%
Supervisor / Manager	23%	21%	13%	33%	18%	31%	31%

Question 6:

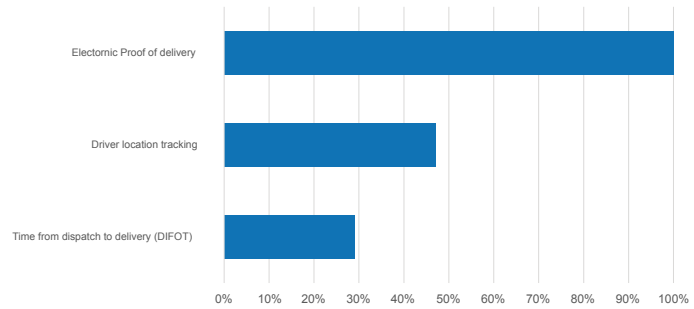
What reporting or data analysis do you offer to your customers?

CUSTOMER REPORTING AND DATA ANALYSIS

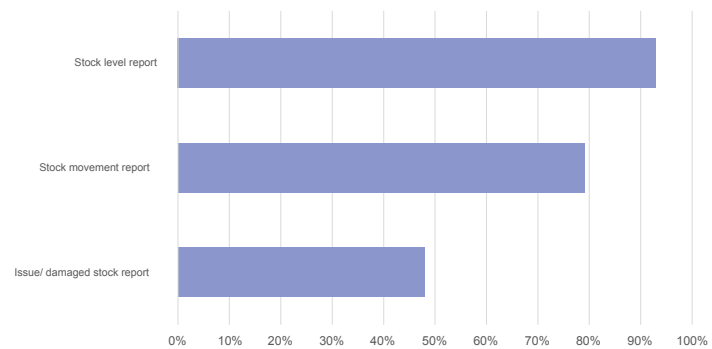


CUSTOMER REPORTING AND DATA ANALYSIS BY INDUSTRY

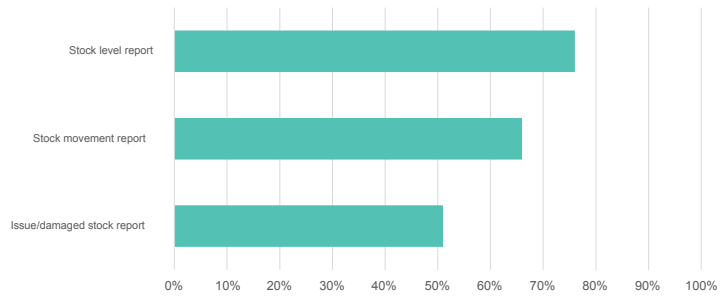
CUSTOMER REPORTING AND DATA ANALYSIS FOR THE TRANSPORT INDUSTRY



CUSTOMER REPORTING AND DATA ANALYSIS FOR THE WAREHOUSE INDUSTRY

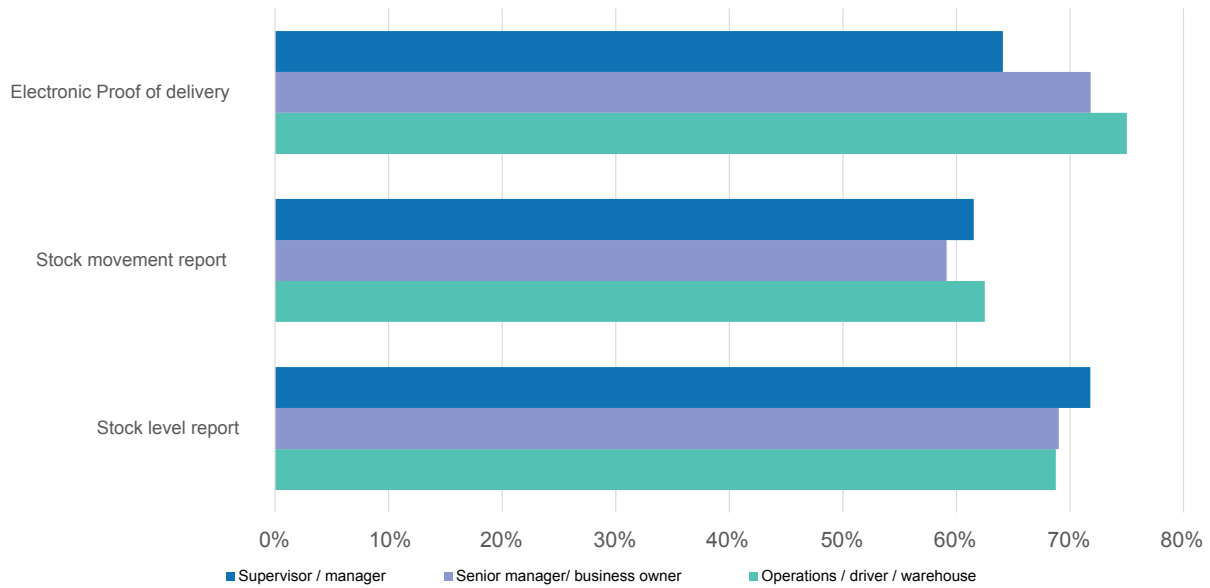


CUSTOMER REPORTING AND DATA ANALYSIS FOR THE WAREHOUSE/TRANSPORT COMBINED INDUSTRY



	Driver Location Tracking	Time From Dispatch to Delivery (Difot)	Stock Level Report	Stock Movement Report	Electronic Proof of Delivery	Inventory Temperature Logging and Reporting	Issue/ Damaged Stock Report
Transport	47%	29%	0%	0%	100%	12%	12%
Warehouse	3%	17%	93%	79%	41%	3%	48%
Warehouse & Transport	44%	43%	76%	66%	74%	14%	51%

CUSTOMER REPORTING AND DATA ANALYSIS BY ROLE

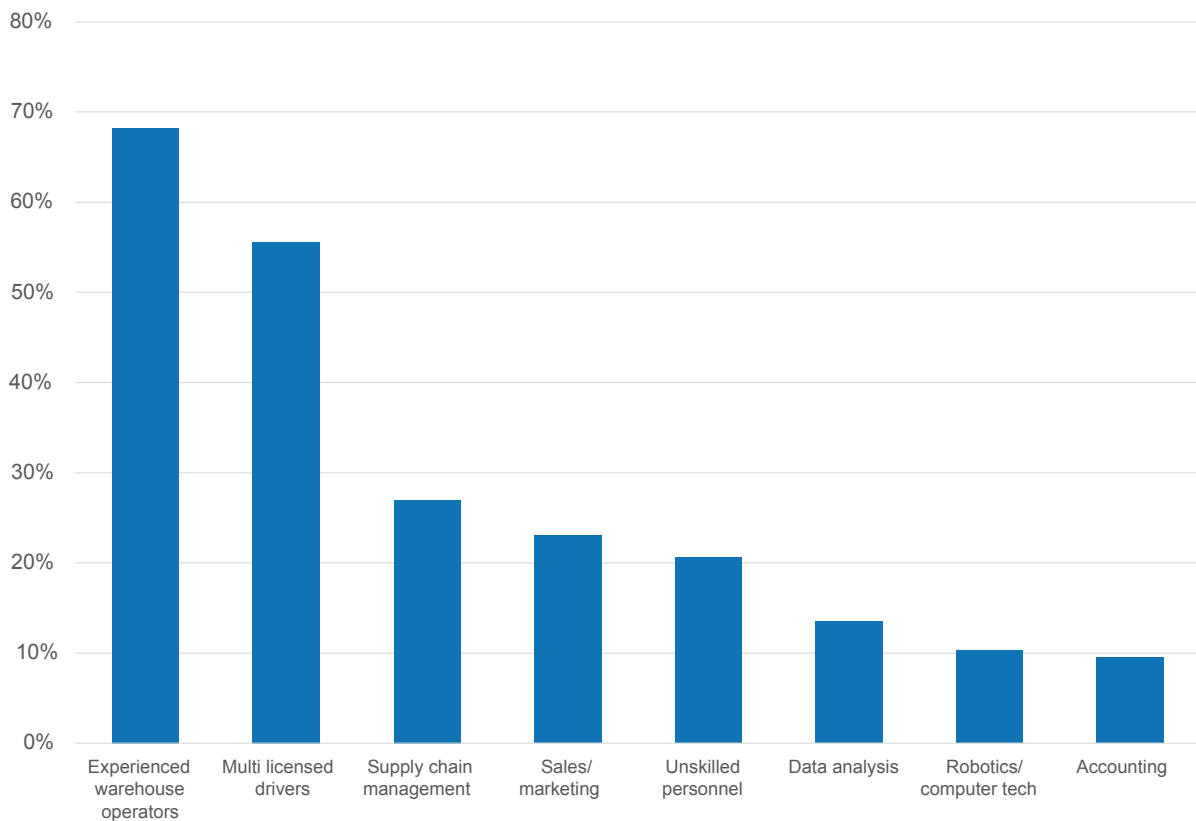


	Driver Location Tracking	Time From Dispatch To Delivery (Difot)	Stock Level Report	Stock Movement Report	Electronic Proof Of Delivery	Inventory Temperature Logging And Reporting	Issue/ Damaged Stock Report
Operations / Driver / Warehouse	31%	31%	69%	63%	75%	6%	50%
Senior Manager / Business Owner	34%	31%	69%	59%	72%	15%	46%
Supervisor / Manager	38%	44%	72%	62%	64%	5%	41%

Question 7:

If you were to bring on new staff, what skills are you seeking to add to your company?

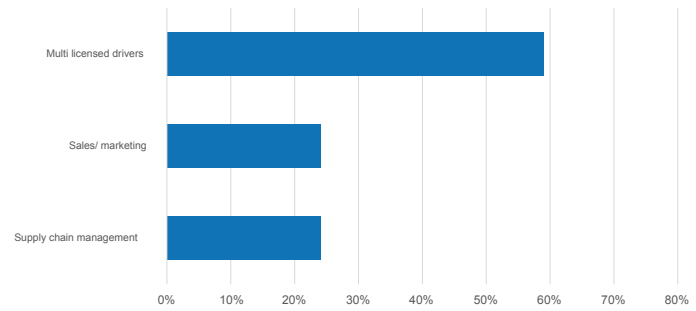
DESIRED SKILLS FOR NEW HIRES



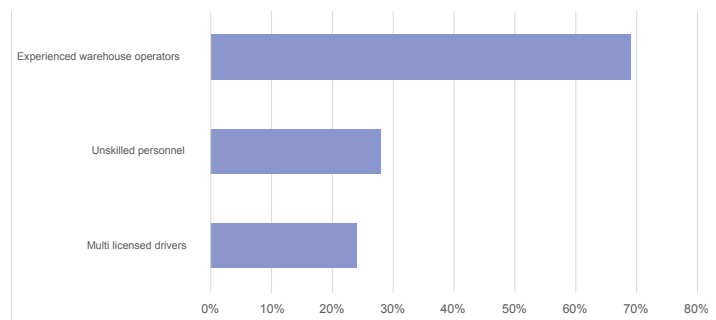
Multi Licensed Drivers	Robotics/ Computer Tech	Data Analysis	Supply Chain Management	Experienced Warehouse Operators	Unskilled Personnel	Accounting	Sales/ Marketing
56%	10%	13%	27%	68%	21%	10%	23%

DESIRED SKILLS FOR NEW HIRES BY INDUSTRY

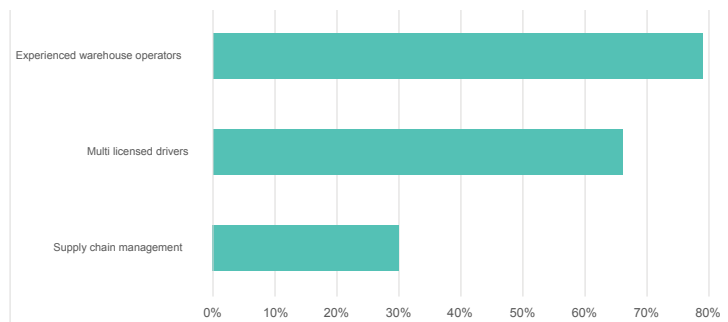
DESIRED SKILLS FOR NEW HIRES FOR THE TRANSPORT INDUSTRY



DESIRED SKILLS FOR NEW HIRES FOR THE WAREHOUSE INDUSTRY

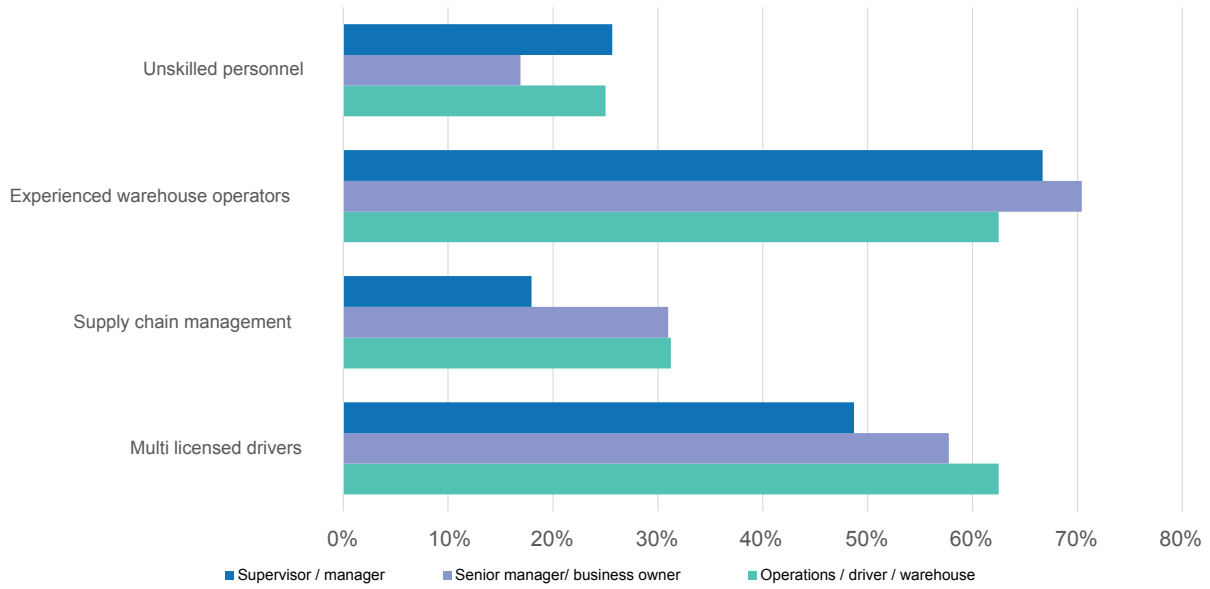


DESIRED SKILLS FOR NEW HIRES FOR THE WAREHOUSE/ TRANSPORT COMBINED INDUSTRY



	Multi Licensed Drivers	Robotics/ Computer Tech	Data Analysis	Supply Chain Management	Experienced Warehouse Operators	Unskilled Personnel	Accounting	Sales/ marketing
Transport	59%	0%	0%	24%	18%	12%	6%	24%
Warehouse	24%	10%	14%	21%	69%	28%	7%	17%
Warehouse & Transport	66%	13%	16%	30%	79%	20%	11%	25%

DESIRED SKILLS FOR NEW HIRES BY ROLE



	Multi Licensed Drivers	Robotics/ Computer Tech	Data Analysis	Supply Chain Management	Experienced Warehouse Operators	Unskilled Personnel	Accounting	Sales/ marketing
Operations / Driver / Warehouse	63%	19%	6%	31%	63%	25%	0%	19%
Senior Manager / Business Owner	58%	8%	17%	31%	70%	17%	11%	24%
Supervisor / Manager	49%	10%	10%	18%	67%	26%	10%	23%



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