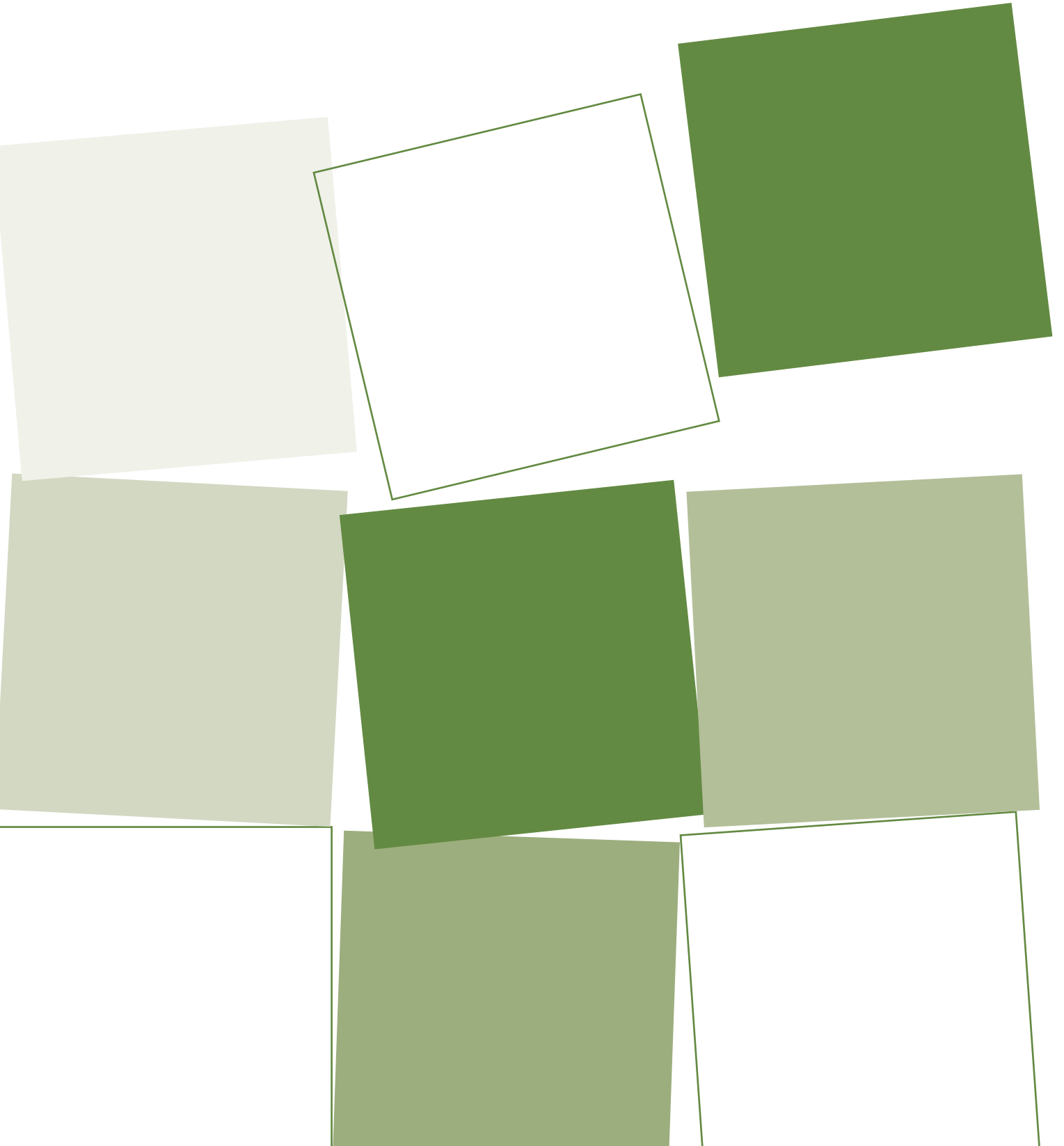




Department of Education and  
Early Childhood Development

# Skills & Training Needs 2013

Victorian Wholesale Trade Industry



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# Introduction

In the context of Victoria's complex and dynamic economy, a demand-led approach is the best way to ensure a responsive and dynamic vocational training system that will help as many people as possible build skills that lead to better jobs. This is most evident in the results of the market approach embodied in the Victorian Training Guarantee, which has achieved positive outcomes for both students and the economy.

The Refocusing Vocational Training in Victoria reforms are designed to satisfy important criteria for a strong vocational training market. Through these reforms the Government is ensuring that the vocational training system continues to produce positive outcomes for students, businesses and Victoria.

Through Refocusing Vocational Training, there is a role for Government in monitoring, providing information and responding to the performance of the vocational training system. A key mechanism by which the Government exercises this role is through the Industry Participation Model. The Industry Participation Model is based on a new partnership approach between Government, industry and training providers. It increases industry influence within the training market by supporting more direct relationships between industry and training providers and by increasing direct consultation with Government.

An aim of the Industry Participation Model is to seek to improve information sharing about training provision, options, outcomes, gaps and associated barriers between industry, training providers and employers to improve alignment between industry needs and training delivery. A suite of information products and tools are being developed, of which this report is one, to support this aim and an overview of these is provided overleaf.

This report describes training and economic activity and developments related to Victoria's Wholesale Trade Industry, bringing together a range of qualitative and quantitative insights from desk research and industry engagement. It highlights both the challenges the industry faces in attracting the right skills, and the opportunities businesses, training providers and Government have to address these challenges. Key metrics used in this report include enrolments by sub-industry, qualification level, occupation, courses, age group, gender, learners facing barriers, provider type, reason for study and completions by related industry sub-sectors. The report also covers apprentices and trainees, and an analysis of the alignment between training delivery and specific industry skills needs. The report produces industry, sub-industry and region-specific findings and, wherever possible, presents comparisons to developments at the State level.

The purpose of this report is:

1. To provide a basis for understanding the Wholesale Trade sector in relation to employment levels, skills shortage occupations, current alignment and responsiveness of the vocational training market to the needs of the sector and to provide an overview of the challenges and opportunities in meeting industry vocational skills needs both now and into the future.
2. To give detailed information around vocational training enrolments by occupation, location, qualification levels and other student characteristics, as it relates to the Wholesale Trade sector in order to gauge current trends in vocational training delivery.
3. To summarise the context of the Wholesale Trade sector in relation to the size and scale of the labour and training markets as well as the current policy, economic and social drivers that it is facing.

## Suite of Information Products & Tools

<p><b>Victorian Quarterly Training Market Reports</b></p> <p>On-going series of quarterly reports aimed at providing a summary of Victorian training market performance following the introduction of the student entitlement system. The report covers three sections – the first provides an overview of the performance of the Victorian training market, the second section examines the participation of learners facing barriers and the third examines the alignment of training to industry skills needs</p> <p><a href="http://www.education.vic.gov.au/training/providers/market/Pages/reports.aspx">http://www.education.vic.gov.au/training/providers/market/Pages/reports.aspx</a></p>	<p><b>Vocational Training: Victoria's Regional Report</b></p> <p>Annual publication examining training delivery in each of Victoria's regions in the context of the local population, economy and workforce, building a picture of the relationship between the local training system and regional skills needs, training market performance and responsiveness</p> <p><a href="http://www.education.vic.gov.au/training/providers/market/Pages/regionaltrends.aspx">http://www.education.vic.gov.au/training/providers/market/Pages/regionaltrends.aspx</a></p>	<p><b>Vocational Training: Victoria's Industry Report</b></p> <p>Published annually, this report combines industry intelligence and economic analysis with training data to build a more complete picture of the relationship between industry skills needs, employment opportunities and skills training. Each of the 19 industry training profiles provide economic context and a summary of training challenges and highlights from IPM initiatives</p> <p><a href="http://www.education.vic.gov.au/training/employers/industry/Pages/marketinfo.aspx">http://www.education.vic.gov.au/training/employers/industry/Pages/marketinfo.aspx</a></p>
<p><b>Industry Sub-sector Summary Reports &amp; Industry Factsheets</b></p> <p>46 sub-sector industry summary reports produced annually highlight industry labour and training market dynamics with an overview of current and forecast employment needs and vocational training patterns across the sectors and at the regional level</p> <p>A series of factsheets are also available for 19 industries</p> <p><a href="http://www.education.vic.gov.au/training/employers/industry/Pages/marketinfo.aspx">http://www.education.vic.gov.au/training/employers/industry/Pages/marketinfo.aspx</a></p>	<p><b>Business Toolkit and Case Studies</b></p> <p>Toolkit for employers providing information on how to get government-subsidised training under the Victorian Training Guarantee; getting the best training for your business, with a helpful checklist; information of Recognition of Prior Learning; and a range of interesting employer and training provider case studies</p> <p><a href="http://www.education.vic.gov.au/training/employers/workforce/Pages/marketfacilitation.aspx">http://www.education.vic.gov.au/training/employers/workforce/Pages/marketfacilitation.aspx</a></p>	<p><b>Portfolio Industry Reports</b></p> <p>These reports describe training and economic activity and developments related to key Victoria's industry sectors. Highlighted are both the challenges the industry faces in attracting the right skills, and the opportunities businesses, training providers and government have to address these challenges. A range of key workforce and training metrics are also provided. There are two tiers of reports; detailed reports representing the focus industries for the Department in 2013, and summary reports covering other industry sectors</p> <p><a href="http://www.education.vic.gov.au/training/employers/industry/Pages/marketinfo.aspx">http://www.education.vic.gov.au/training/employers/industry/Pages/marketinfo.aspx</a></p>
<p><b>Industry Blog</b></p> <p>A forum for people interested in industry skills and training issues in Victoria, the blog features a range of topics relevant to stakeholders, information on recent industry events, groups and forums and new initiatives focused on enhancing market performance through facilitation activities</p> <p><a href="http://skillsblogvic.wordpress.com/">http://skillsblogvic.wordpress.com/</a></p>	<p><b>Industry Skills Update - e-Alerts</b></p> <p>Regular email update featuring the latest news about IPM activities; market facilitation and related government initiatives; reports; and training performance information</p> <p>To subscribe contact: Department of Education &amp; Early Childhood Development, <a href="mailto:skills.online@edumail.vic.gov.au">skills.online@edumail.vic.gov.au</a></p>	<p><b>Web Pages – Industry Training Market Information</b></p> <p>19 webpages with information about the skills and training market for industry sectors. For each industry, there's a training snapshot, information about skills in demand, training market intelligence reports and factsheets along with more detailed reporting for each industry sub-sector. Information is updated regularly</p> <p><a href="http://www.education.vic.gov.au/training/employers/industry/Pages/marketinfo.aspx">http://www.education.vic.gov.au/training/employers/industry/Pages/marketinfo.aspx</a></p>
<p><b>Rate Your Training</b></p> <p>Ratings tool for industry and employers which is a simple-to-use system where employers can rate the performance of a training provider in a particular study area against selected criteria, and review and compare the ratings of other employers</p> <p><a href="http://rateyourtraining.com.au/">http://rateyourtraining.com.au/</a></p>	<p><b>E-Marketplace (in development)</b></p> <p>Website which facilitates connections between employers and training providers. Employers can anonymously post their training requirements and training providers are able to provide structured response online. Employers are then able to review the response with no obligation, create a shortlist and follow up directly with their preferred providers</p>	<p><b>Victorian Skills Gateway</b></p> <p>One-stop-shop of Victorian vocational education and training to help find the best option for students. Searches can be performed on occupations, courses, training providers, video and written case studies. This website is also viewable via a purpose-built smartphone interface</p> <p><a href="http://www.education.vic.gov.au/victorianskillsgateway/Pages/home.aspx">http://www.education.vic.gov.au/victorianskillsgateway/Pages/home.aspx</a></p>

# Industry and data scope

This section summarises the scope of the Wholesale Trade Industry<sup>1</sup> as well as key data sources.

## Products and Services

The Wholesale Trade industry includes businesses mainly engaged in the purchase and on-selling, the commission-based buying, and the commission-based selling of goods, without significant transformation, to other businesses.

Wholesalers' premises are usually a warehouse or office with little or no display of their goods, large storage facilities, and are not generally located or designed to attract a high proportion of walk-in customers. Wholesaling is often characterised by high value and/or bulk volume transactions, and customers are generally reached through trade-specific contacts.

The Wholesale Trade Division distinguishes two types of wholesalers:

- merchant wholesalers who take title to the goods they sell, including import/export merchants; and
- businesses whose main activity is the commission-based buying and/or the commission-based selling of goods, acting as wholesale agents or brokers, or business to business electronic markets, both of whom arrange the sale of goods on behalf of others for a commission or fee without taking title to the goods.

**Figure 1.1: Wholesale Trade ANZSIC breakdown**

ANZSIC code	ANZSIC industry	
33	Basic Material Wholesaling	
	331	Agricultural Product Wholesaling
	332	Mineral, Metal and Chemical Wholesaling
	333	Timber and Hardware Goods Wholesaling
34	Machinery and Equipment Wholesaling	
	341	Specialised Industrial Machinery and Equipment Wholesaling
	349	Other Machinery and Equipment Wholesaling
35	Motor Vehicle and Motor Vehicle Parts Wholesaling	
36	Grocery, Liquor and Tobacco Product Wholesaling	
37	Other Goods Wholesaling	
	371	Textile, Clothing and Footwear Wholesaling
	372	Pharmaceutical and Toiletry Goods Wholesaling
	373	Furniture, Floor Covering and Other Goods Wholesaling
38	Commission-Based Wholesaling	

<sup>1</sup> As defined by the Australian Bureau of Statistics, Australian and New Zealand Standard Industrial Classification (ANZSIC), 2006.

## Data

The main source of data on vocational training activities is the training activity database referred to as SV Training System (SVTS).

The report presents findings for the time period from 2008 to 2013, with an in depth analysis of developments and patterns in the 2013 calendar year. Data was extracted from SVTS as at March 2014 and subject to revision.

This report includes government subsidised vocational training enrolments only. Data on completions contain all government subsidised and fee for service enrolments at any course level by all providers.

Training data shown in the tables are rounded to the nearest 100 when the figures are greater than 1,000; to the nearest 50 when they are between 100 and 1,000; and to the nearest 10 when they are less than 100. Any percentages are calculated based on the original, unrounded data.



# Wholesale Trade trends and issues

This section focuses on the Wholesale Trade Industry as a whole. It covers: the key issues and challenges including economic conditions, new regulations, demographic changes, changing social attitudes, new technology/processes, changing consumer tastes, environmental sustainability and the direction of industry restructuring

## Key messages, issues and challenges

- Activity within the Wholesale Trade sector is driven by the supply of goods primarily from the Agricultural, Mining, Manufacturing industries, and the demand for goods by the Services industries. The economic, political and environmental conditions across these supply chains directly influence wholesalers, and the sector was particularly impacted by the global financial crisis.
- Changing patterns of consumer behaviour are impacting profit margins in the sector, with increased online purchasing, often directly from the manufacturer and frequently from overseas; subdued spending levels and heightened competition for low cost products and services. Wholesale suppliers to the Construction and Automotive industries have been particularly affected by dampened confidence and consumer sentiment.
- While the market for essential items, such as food and beverages is primarily driven by population size and demographic structure, aggressive pricing wars and wholesale bypassing by the major supermarket chains are key challenges. Indeed, wholesale bypassing is the largest challenge currently facing the industry overall.
- Across the industry, there has been a recent trend towards consolidation of the business base, and increasing levels of vertical integration of services. However, there are also opportunities for wholesalers to tap into emerging markets across China and Asia, and to sell directly to consumers, while avoiding the need and costs of a physical 'shop-front' presence.
- The Wholesale Trade sector is estimated to be worth around \$14.4 billion to the Victorian economy, with a workforce of approximately 130,800 workers, representing 5 per cent of Victorian employment.
- Growth in output is expected to be broadly in line with forecast growth rates for Victoria, and is currently forecast at 15 per cent over the five years to 2017-18.

- At the end of 2012, it was estimated that there were around 22,360 businesses in the industry operating in Victoria, with proportionally more workers per firm than average, and a higher share of firms with a turnover above \$200,000 per year.
- Business is concentrated in the industrial precincts in Melbourne, close to transport, warehousing and manufacturing hubs. There are however, concentrations of industry in Geelong, Shepparton, Mildura and Wodonga, as well as Bacchus Marsh and Lara on the outskirts of Melbourne.

## Industry trends and outlook

The performance of the Wholesale industry is inextricably linked to cyclical activity in the Construction industry, shifting demand across the Manufacturing sectors, fluctuating costs of raw materials, imports and changing patterns of consumer behaviour; and the sector was one of the hardest hit areas of the economy during the global financial crisis.

Of the 39 sub-sectors of the Wholesale Trade industry, some fared better than others during this period, and some have been harder hit by the ongoing move towards wholesale bypass, whereby manufacturers deal directly with retailers and contractors, bypassing the role of wholesalers. This trend has been compounded by the high Australian dollar, which has also led to some retailers and consumers importing products directly from cheaper foreign markets, and leaving the local merchants out of the transaction loop.

While this has resulted in some consolidation of the business base, employment forecasts for the sector across Victoria over the next five years are positive (see Figure 3.1) and there are opportunities to be had across China and other emerging economies in the Asia Pacific region following strong population growth, rising household spending power and substantial increases in two-way online trade.

Looking forwards, it is expected that consolidation and increased vertical integration of businesses in the sector will continue as the trend towards wholesale bypass gathers pace. Profit margins will continue to be squeezed but opportunities exist around innovative new products, new markets and new business models.

The following tables outline the industry trends and drivers for the main areas of activity within the Wholesale Trade sector.

### Construction-Related Wholesaling

- The recently subdued housing market, deteriorating trends in housing affordability, high mortgage payments and a slump in commercial building investment have had negative effects on profitability for wholesalers to the Construction industry, although looking forwards, the value of new housing construction is expected to climb through to 2018-19, especially in multi-unit apartments. Future increases in the value of commercial and industrial building construction, are expected to offset the projected flat growth in the institutional building market.
- Timber wholesalers are affected by the price and availability of plantation trees, with hardwood resources diminishing; and whilst a key supplier to the Construction industry, they are also influenced by trends in the Furniture Manufacturing sub-sector – a sub-sector increasingly exposed to cheaper imports, and the shift towards greater use of other substitute products (such as plastics and glass).
- Many wholesaling firms supporting construction-related activity are small-scale and operating in narrow regional or product markets, which are typically part of a larger franchise or buying group. There has been some consolidation of industry ownership in the past two decades, with key players taking an increasing proportion of industry share. This competition is expected to intensify over the next five years. On top of this, more players are beginning to understand the value of having exclusive distribution rights to certain brands and large players in particular are expected to pressure suppliers to provide them with that advantage.

### Food, Beverage and Grocery-Related Wholesaling

- The flow-on effects from issues affecting the Agricultural industry (such as climatic change and weather, resource availability, changing food tastes and population pressures) are keenly felt downstream in wholesalers of food, beverage and related agricultural machinery and products.
- Wholesale bypass is a key issue for this sector, as the major supermarkets have established direct relationships with manufacturers and primary producers and their unrelenting competition is placing pressure on even the strongest operators in the industry. Heavy price discounting and promotions means many wholesalers simply cannot compete on a price basis with their bigger rivals.
- However, wholesalers have been able to increase their profit margins slightly over the past five years through better cost management and greater economies of scale, and the staple nature of many of the industry's products, such as sugar, flour and a range of canned goods, means that major declines are generally avoided.
- Fifteen per cent of Victorian wholesalers are associated with the wholesale of food and beverage products, and internationally there are increasing opportunities in this area. The Victorian Government runs regular trade mission programs to key international target markets such as China, South East Asia, India and the Middle East, and there are significant prospects from the rising wealth of Asia, especially China.
- Under Major Projects Victoria, work commenced in 2009 on the relocation of the Melbourne wholesale fruit and vegetable market, to a new site in Epping, from its current location on Footscray Road (West Melbourne). The market is expected to be fully operational in 2014-15, and will meet current and future needs for warehousing space, cater for modern logistics, encourage innovation in transport, equipment, materials handling, storage and information technology in the fresh food industry. Upon completion over the next 10-20 years, the new market precinct incorporating the market's core trading facility, warehousing, distribution centres and value-added business is expected to drive over \$1 billion of investment on the site.

### Non-Food Consumer Goods Wholesaling

- The retail environment for household appliances and other household goods has changed dramatically over the past five years. A number of retailers have entered voluntary administration or receivership as competition has intensified and internet sales increased. Looking forwards, innovation is a key variable driving industry activity. Products offering consumers a better experience, additional convenience or improved energy efficiency are expected to drive industry growth in the future.
- Low cost producers of clothing, footwear and textiles such as China and Vietnam are becoming more accessible and selling products directly to retailers, bypassing wholesalers in the process.
- Weak growth in the Retail industry, the growing trend towards online shopping, lower cost production by manufacturers and the volatility of cotton prices has also affected the industry's profit margins, with the price of cotton reaching record highs over the past five years.
- The globalisation of many manufacturers and retailers and the growth of several large vertically integrated retail entities also mean buyers and manufacturers can easily bypass wholesalers in an attempt to cut costs, further reducing demand for wholesaling services. However, many wholesalers are trying to turn the situation around and the rise of online shopping means that they can easily set up low-cost online storefronts without going through retailers, allowing them to capture downstream markets much more effectively.
- Changing patterns of consumer behaviour affect some segments of the industry more than others. For example, the Paper Product Wholesaling sub-sector has been particularly hit by increased use of the internet and other electronic media for news, correspondence, bills, books and magazines; and whilst knock-on benefits would expect to be seen in the Computer Wholesaling sub-sector, this is not necessarily the case. Much of the software previously sold by this industry is now purchased online, directly from overseas developers, while unit costs have fallen across the board. However, growth in software licensing does offer potential opportunities for some.

### Automotive-Related Wholesaling

- Wholesaling associated with the Automotive industry accounts for 7 per cent of all Victorian wholesale businesses, and few involved in the automotive supply chain dodged the global financial crisis. New car sales decreased; driving habits changed with a shift towards smaller and more fuel-efficient vehicles at lower price points; fuel costs increased; domestic production declined and consumer sentiment changed. On the plus side, used car sales over the period went up.
- Commodity prices (e.g. steel and iron ore) have also driven up input costs over the past five years, and wholesalers have found themselves squeezed in the supply chain, as the cost of manufacture has increased, while retail prices continued to fall to stimulate demand.
- Companies that wholesale domestically manufactured vehicles have suffered from this shift, while importers of small vehicles have been the major winners. To withstand the tough conditions and remain competitive, car wholesalers have aimed to reduce capacity and labour costs wherever possible.
- Over the next five years, growth in the industry is expected to remain subdued. However, some opportunities may coincide with the green-car revolution and forward integration by wholesalers into retail is expected to gain momentum; and whilst lower tariffs will increase the competitiveness of wholesalers dealing in imported vehicles, the dampening of the Australian dollar will counteract this.

### Pharmaceuticals wholesaling

- Australia's export of pharmaceutical products to China has grown at an average annual rate of over 30 per cent since 2001, while on the domestic front, as the 'over 50' population increases, so too does the demand for these products.
- However, growth rates have faltered more recently in line with changes to the industry's operating environment. In particular, ongoing Commonwealth Government efforts to curb the cost of the Pharmaceutical Benefits Scheme (PBS) are having significant implications for wholesalers' revenue streams, and the industry has also been influenced by changes to the Community Service Obligation (CSO), designed to compensate wholesalers for this reduction in margins.
- Wholesale bypass has also been a feature of the industry for several years.

Sources: various IBISWorld reports, 2013

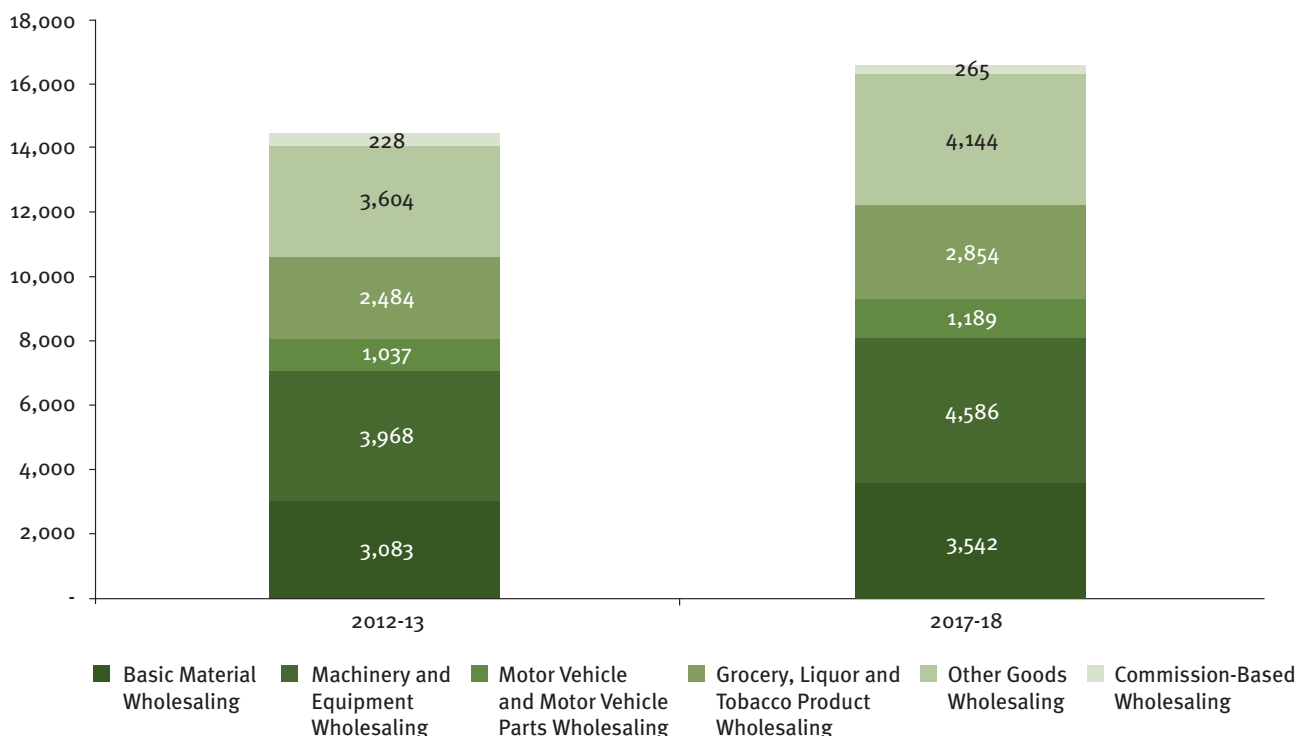
## Economic contribution

Victoria's Wholesale Trade industry contributed approximately \$14.4 billion to the State economy in 2012-13, around 5 per cent of total output. The industry directly employs approximately 130,800 workers, representing 5 per cent of Victorian employment.

Output growth of 15 per cent is anticipated in the five years to 2017-18, to around \$16.6 billion. This is broadly in line with the anticipated state growth rate of 14 per cent across all Victorian industries. Machinery and Equipment Wholesaling accounts for the highest proportion of industry output, 25 per cent of the total. This is expected to remain consistent through to 2017-18.

A highly skilled workforce leads to increased productivity and economic growth. High quality education and skills training is essential for Victorians to access the opportunities of a growing and changing economy, and an increasingly sophisticated and information-rich society.

**Figure 2.1: Wholesale Trade output (\$ million), Victoria, 2012-13 and 2017-18**

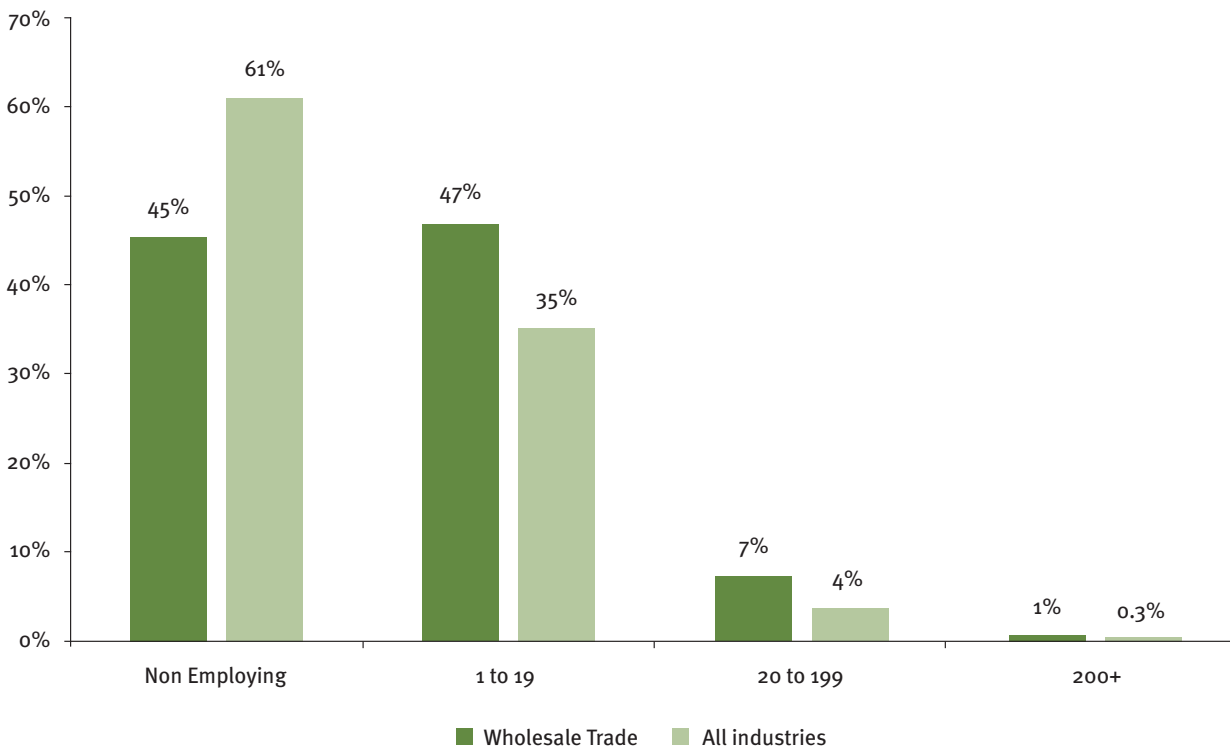


Source: Monash Centre of Policy Studies (CoPS) Employment Forecasts, June 2013

## Employer profile

At the end of June 2012, it was estimated that there were 22,360 businesses in the Victorian Wholesale Trade Industry. The distribution of Wholesale Trade businesses by employment level is skewed towards businesses that employ proportionally more workers than the average firm. Non-emplying business will constitute self-employed contract workers as well as holding companies; Wholesale Trade has a smaller proportion of these business than the 'all industries' average of 61 per cent.

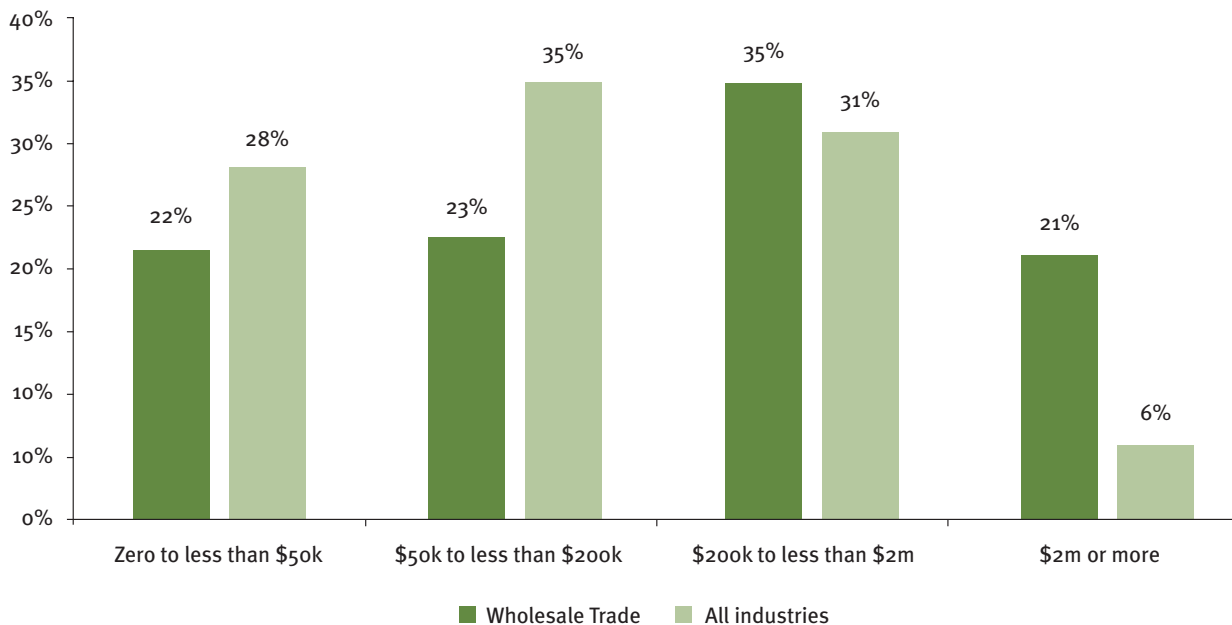
**Figure 2.2: Share of businesses by employment, Victoria, 2012**



Source: Australian Bureau of Statistics (ABS), Count of Australian Businesses, including entries and exits, 2012

With regards to turnover, Victoria's Wholesale Trade businesses are less likely to be in the low to medium turnover ranges (less than \$200,000) when compared with the average business profile across all industries. They are much more likely to have a very large annual turnover (\$2 million and over) than the all-industry average – 21 per cent of firms compared with an average of 6 per cent. In 2012, 4,700 firms reported turnover greater than \$2 million.

**Figure 2.3: Share of businesses by turnover size, Victoria, 2012**



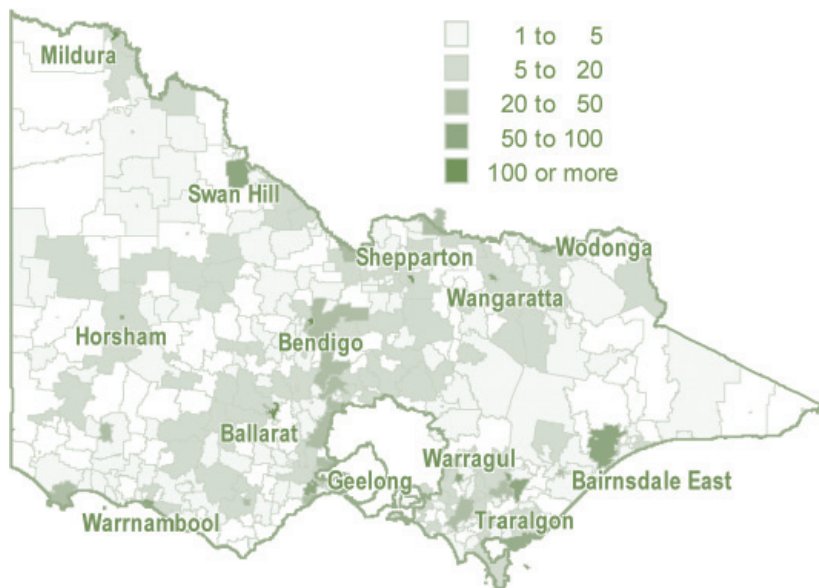
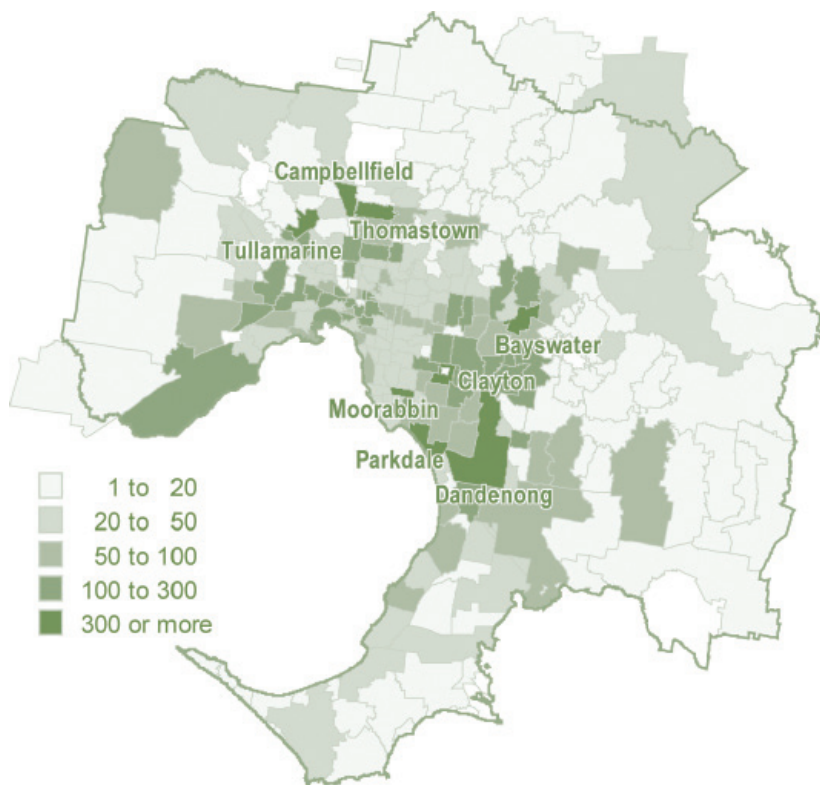
Source: Australian Bureau of Statistics (ABS), Count of Australian Businesses, including entries and exits, 2012

The Wholesale Trade industry in metropolitan Melbourne is generally concentrated in industrial precincts close to transport, warehousing and manufacturing hubs. This reflects the importance of minimising transport costs and a desire to have easy access to major transport and freight hubs. Figure 2.4 highlights the relative concentrations of business establishments near arterial roads and highways in the northern (Campbellfield and Tullamarine), eastern and south eastern regions of metropolitan Melbourne (Bayswater, Braeside, Clayton, Dandenong and Moorabbin). These regions combined account for over 35 per cent of Wholesale Trade business establishments in metropolitan Melbourne.

Establishment numbers have been increasing in the outer growth areas of Campbellfield, Dandenong, Hallam and Tullamarine, where there are large areas of market ready industrial land available.

In regional Victoria, the industry is generally concentrated in the larger population centres such as Geelong, Shepparton, Mildura and Wodonga. Other areas of concentration include Bacchus Marsh and Lara which are on the peri-urban fringe.

Figure 2.4: Location of Wholesale Trade establishments in metropolitan and regional Victoria, 2010-11



Source: Department of State Development, Business and Innovation, Wholesale Trade Industry. Business location in Victoria: A decade of change, October 2012 (based on data from WorkSafe Victoria)

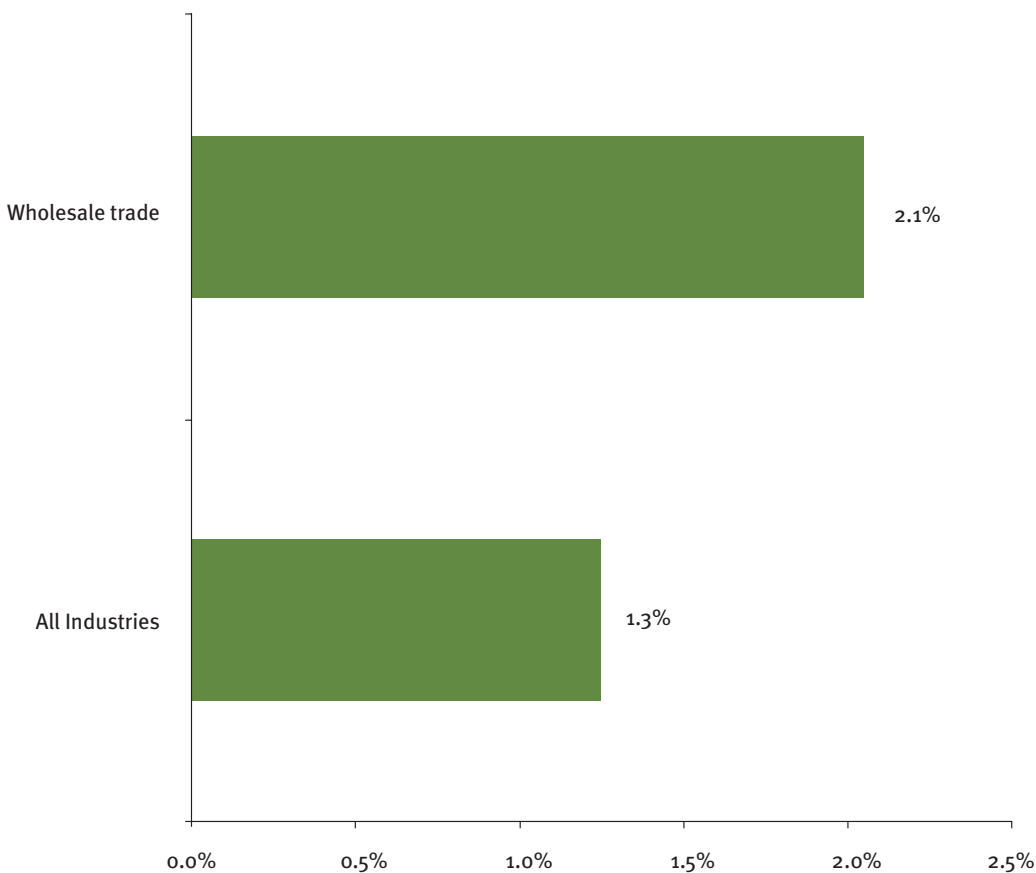


## Labour productivity

Labour productivity is defined as real gross value added per hour worked. The figure below shows the average annual compound rate of growth in labour productivity for the Wholesale Trade industry over the period 2003 to 2013. Nationally the average compound annual growth rate of labour productivity for Wholesale Trade was 2.1 per cent, while the 'all industries' average was 1.3 per cent.

Up-skilling the workforce continues to be an important focus for increasing productivity, and producing more with less. A well-trained, job-ready workforce is the life-blood of Victoria's industry and business and the largest determinant of productivity in the State's economy.

**Figure 2.5: Labour productivity measure by Gross Value Added (GVA) per hour worked, average annual growth, Australia, 2003-2013**



Source: Australian Bureau of Statistics (ABS), Australian System of National Accounts, 5204.0

# Wholesale Trade workforce and skills

This section focuses on the Wholesale Trade industry's workforce. It covers employment levels and trends, as well as workforce characteristics such as age and skill level.

## Key messages, issues and challenges

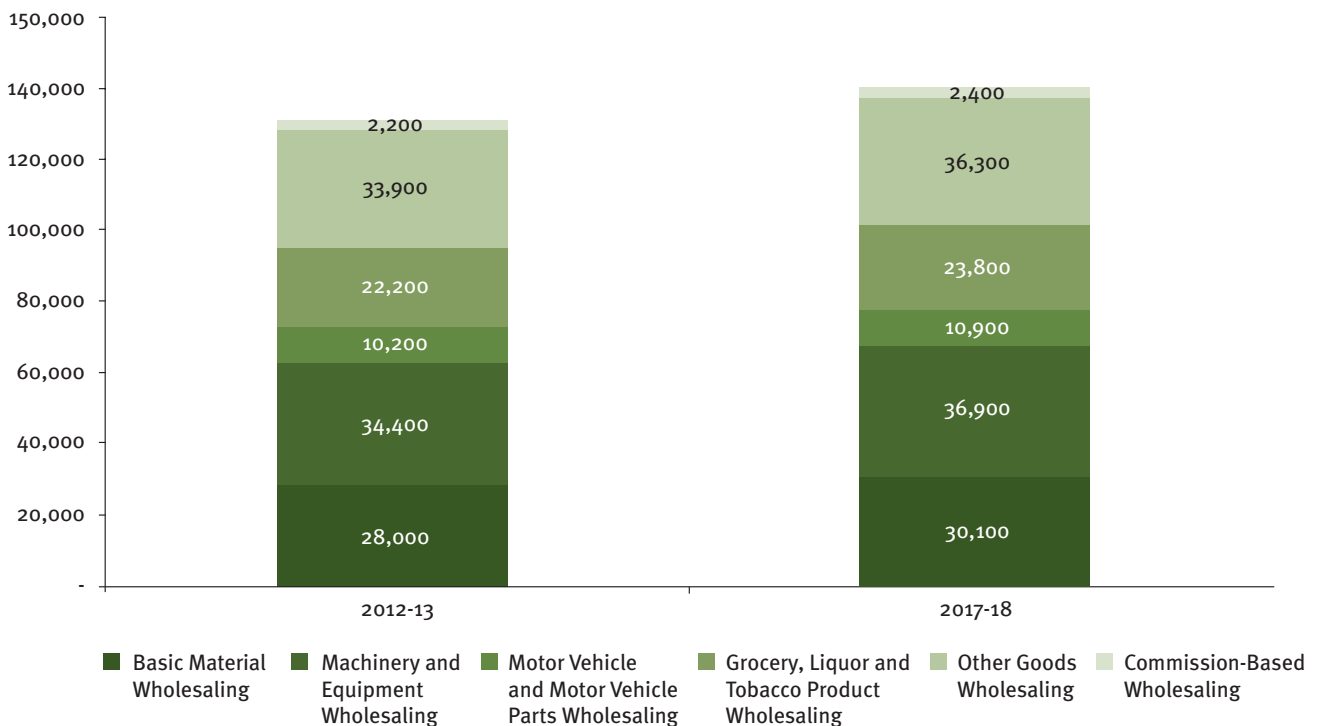
- Approximately 130,800 people were employed in Victoria's Wholesale Trade industry in 2012-13. Employment has been growing in recent years, and this trend is forecast to continue. The industry has seen employment increase by 4 per cent over the last five years (around 5,400 employees). Over the five years to 2017-18, employment is forecast to increase by around 7 per cent (or 9,600 jobs).
- The industry's workforce has an older than average age profile, with a low and declining proportion of workers under the age of 25. While some of the reduction in the 15-24 year old workforce may imply up-skilling, (for example, workers requiring more education or training prior to entering the industry), it may also suggest that the industry is failing to attract young people and so is relying more heavily on an ageing workforce.
- The industry also has a relatively low qualification profile compared with the average workforce across all Victorian industries. Twenty-five per cent of the Wholesale Trade workforce has higher education qualifications compared with an all-industry average of 29 per cent. Over time, however, the skills composition of the industry has been shifting towards more highly skilled workers, and this trend is anticipated to continue into the future.
- The proportion of workers employed in clerical and administrative, sales, machinery operation, and management roles in the sector is above average, and over the past fifteen years, there has been a rise in the proportion of managers and machinery operators and drivers. These movements point to structural changes occurring in the industry and may be linked to the movement of wholesale functions to other industries (e.g. integration with retailers) at this time.
- Improvements in technology may be requiring changes in organisation structure and leading to greater specialisation of tasks. Technology improvements are also likely to reduce the need for administrative staff, particularly as the capabilities of software used in logistics networks improve.
- Key workforce skills issues and challenges focus on identifying opportunities and new business models as a result of the growing trend for wholesale bypassing. This may involve management of vertical integration processes, providing a service to retailers focused on enhanced product knowledge and market understanding, sourcing approaches to selling direct to consumers and identifying foreign market openings.
- Inventory management skills remain critical for the industry, while occupational health and safety is relevant across the board.

## Employment

Approximately 130,800 people are employed in Victoria's Wholesale Trade industry. The industry has seen employment grow by 4 per cent over the five years to 2012-13, equating to approximately 5,400 employees. The outlook over the next five years is for employment to increase by approximately 7 per cent (or 9,600 jobs).

Machinery and Equipment Wholesaling is the largest sub-sector for employment, closely followed by Other Goods Wholesaling (each accounting for 26 per cent of total industry employment).

**Figure 3.1: Wholesale Trade employment, Victoria, 2012-13 and 2017-18**

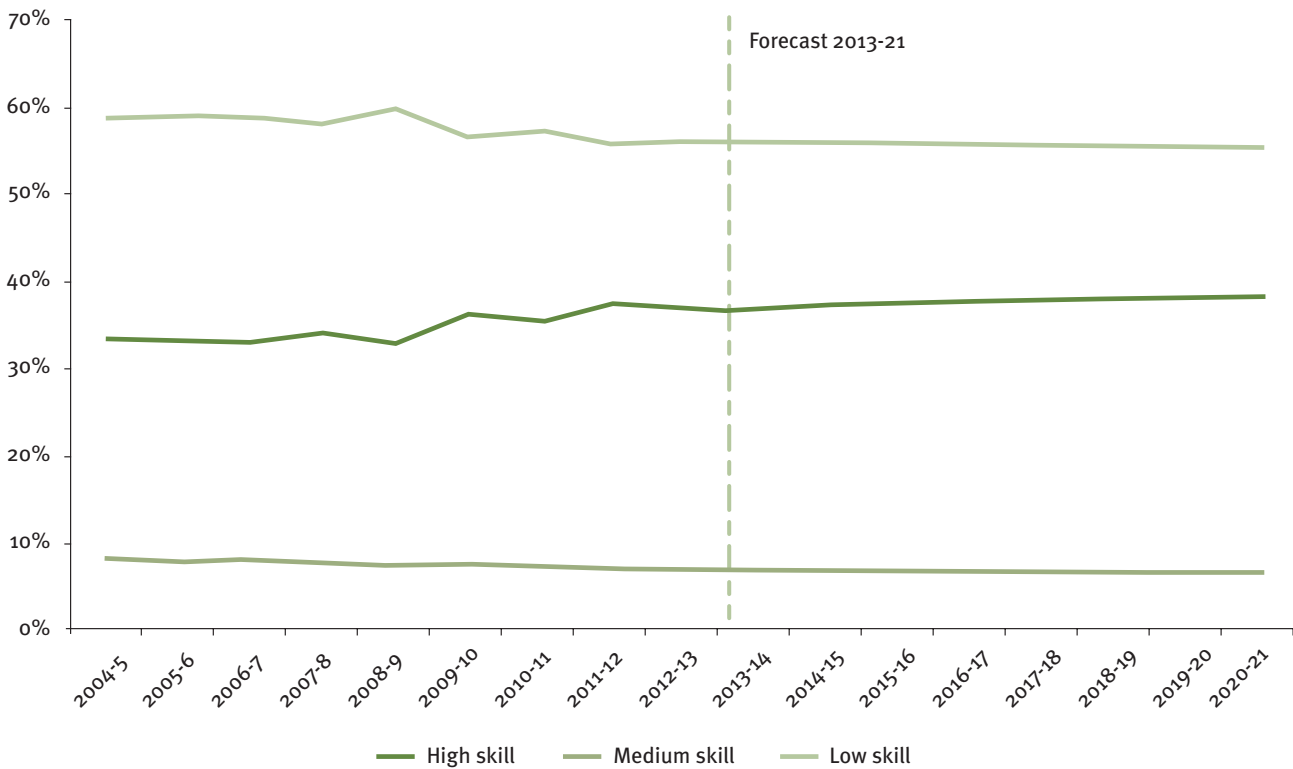


Source: Monash Centre of Policy Studies Employment Forecasts, June 2013

## Skills composition

The Wholesale Trade industry’s high skill and low skill roles show a divergent pattern – highly skilled roles as a percentage of the overall workforce are increasing over time. By 2020-21 highly skill roles are expected to constitute 38 per cent of the workforce – up from 33 per cent in 2004-05. Lower skill roles are expected to decline to 55 per cent of the workforce, down four percentage points over the same period.

**Figure 3.2: Victorian Wholesale Trade industry skill levels**



Source: Monash Centre of Policy Studies Employment Forecasts, June 2013

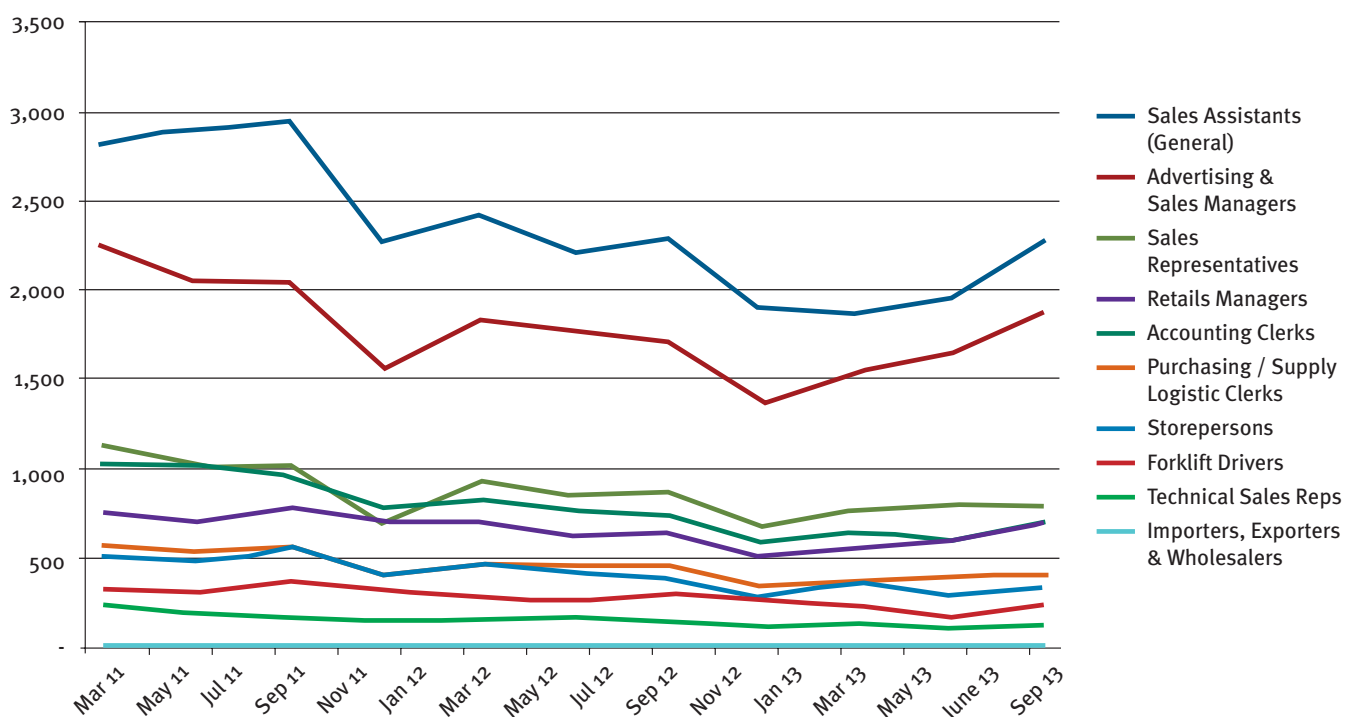
Note: High skill—managers and professionals. Medium skill—technicians and trades workers, community and personal service workers. Low skill—clerical and administrative workers, sales workers, machinery operators, drivers and labourers.

## Job vacancies

The figure below highlights the number of vacancies posted online in Victoria over the last two years for selected key Wholesale Trade occupations. The number of online job advertisements across the larger Wholesale Trade occupations has fluctuated over the period, but has shown no clear upward or downward trend. This differs from the declining trend seen in the national Internet Vacancy Index.<sup>2</sup>

There were approximately 7,500 newly lodged vacancies in key Wholesale Trade occupational groupings in September 2013. Apart from Sales Assistants (General) other large occupational groupings were Sales Representatives, Retail Managers and Purchasing and Supply Logistics Clerks.

**Figure 3.3: Number of newly lodged online vacancies in key Wholesale Trade occupations in Victoria, 2011-13**



Source: Department of Education, Employment and Workplace Relations (DEEWR) Internet Vacancy Index (based on a count of online vacancies newly lodged on SEEK, My Career, CareerOne and Australian JobSearch), major advertising occupations only. Note: caution advised when using monthly occupation data as it is susceptible to fluctuation from month to month.

<sup>2</sup> Department of Education, Employment and Workplace Relations, DEEWR Vacancy Report, September 2013.

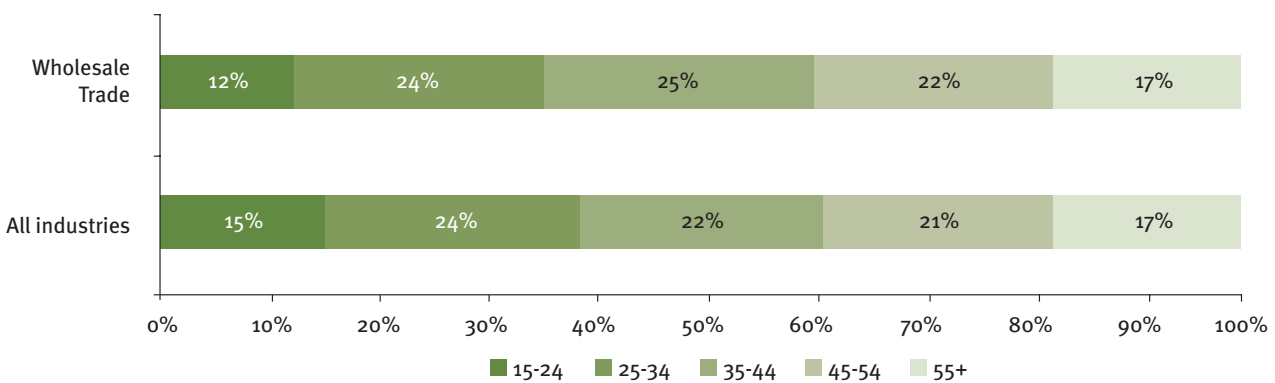
## Labour market characteristics

### Employment by age

The Wholesale Trade workforce has a slightly older age profile than the average across all Victorian industries. Just 12 per cent of workers are aged 24 years and under compared with an average of 15 per cent across Victoria. The highest proportion of Wholesale Trade workers fall within the 35-44 years age cohort, 25 per cent of the total.

The proportion of workers under the age of 25 has been declining in recent years. While some of the reductions in the 15-24 year old workforce may imply up-skilling (for example workers requiring more education or training prior to entering the industry), the proportion of workers aged 25-34 years has also declined. Given that the emphasis within the sector is still on clerical and administration, sales and machinery operator roles, this shift in age probably suggests that the industry is failing to attract young people and is relying more heavily on an ageing workforce.<sup>3</sup>

**Figure 3.4: Proportion of employment by age, Victoria, 2012-13**



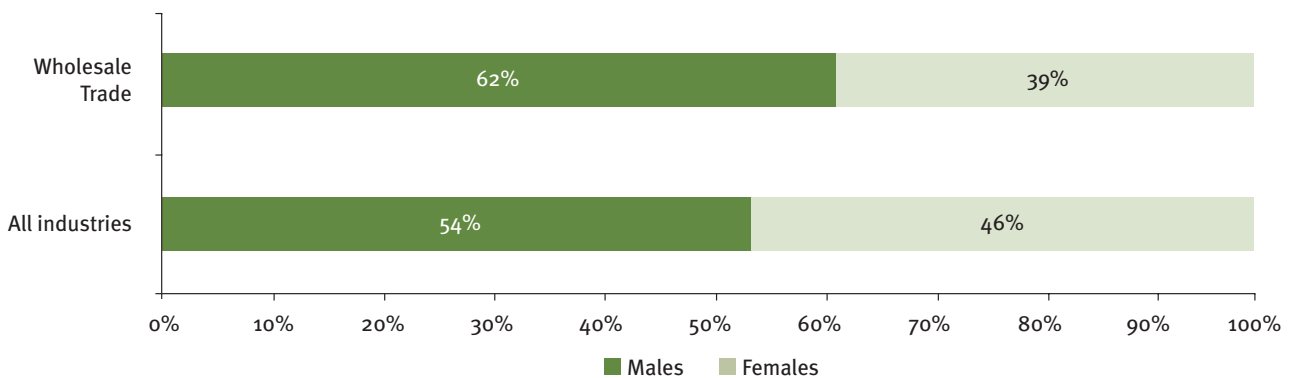
Source: Monash Centre of Policy Studies Employment Forecasts, June 2013

<sup>3</sup> Department of State Development, Business and Innovation, Wholesale Trade, Services Sector Industry Analysis, 2012.

### Employment by gender

Women are relatively under-represented in the Wholesale Trade workforce when compared with the average workforce profile across all Victorian industries. Thirty-nine per cent of Wholesale Trade industry workers are women compared with an all-industry average of 46 per cent.

**Figure 3.5: Proportion of employment by gender, Victoria, 2012-13**

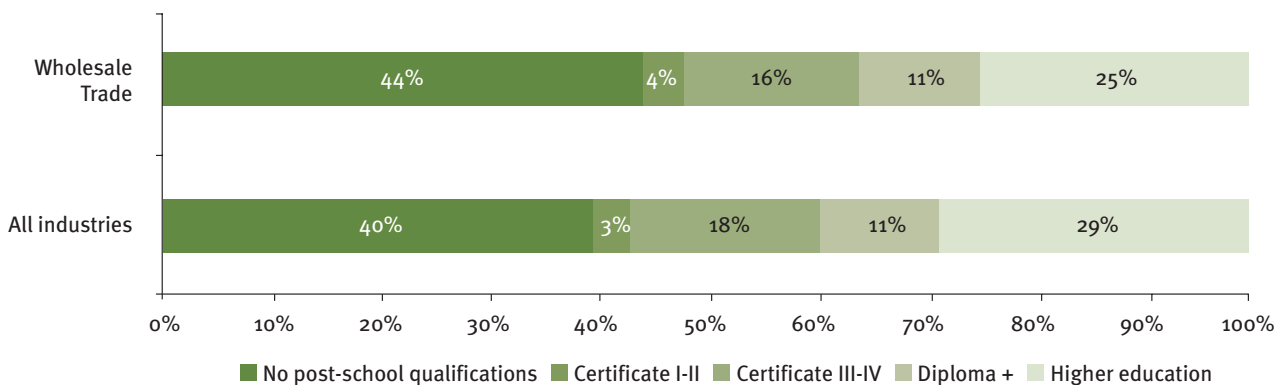


Source: Monash Centre of Policy Studies Employment Forecasts, June 2013

### Employment by qualification level

A relatively high proportion of the Wholesale Trade workforce (44 per cent) has no post school qualifications. Conversely, a lower proportion of the workforce holds higher education qualifications when compared with the average qualification profile across all industries – 25 per cent of workers compared with an all-industry average of 29 per cent.

**Figure 3.6: Proportion of employment by qualification level, Victoria, 2012-13**



Source: Monash Centre of Policy Studies Employment Forecasts, June 2013

## Occupations in demand

Table 3.1 highlights the occupations at four-digit ANZSCO level (Australian and New Zealand Standard Classification of Occupations) that align to the Wholesale Trade industry. Note that while some occupations also align to other industries, the figures shown are specific to the Wholesale Trade industry.

Forecasts presented in the table estimate the employment growth and replacement demand in terms of the average number of jobs required for each occupation annually up to 2017-18.

Employment growth is the net number of new jobs that the occupation is currently forecasting within the industry. Replacement demand is the number of existing workers that are forecast to leave each occupation through retirement, moving on etc. that require replacing to meet existing employment needs.

Across all occupations in the Wholesale Trade industry (including office support occupations such as book-keepers, receptionists etc.) projected average annual employment needs between 2012-13 and 2017-18 are around 7,000 per year.

**Table 3.1: Estimated annual employment growth + replacement demand figures for occupations in the Wholesale Trade sector across Victoria**

Occupation	2012-13 employment total	Average annual employment needs	Overall employment growth to 2017-18
Storepersons	9,960	430	560
Sales Representatives	9,260	410	580
Advertising and Sales Managers	6,860	380	820
Purchasing and Supply Logistics Clerks	5,710	260	480
Importers, Exporters and Wholesalers	5,350	380	400
Accounting Clerks	4,710	200	540
Sales Assistants (General)	4,380	280	240
Technical Sales Representatives	3,760	270	660
Forklift Drivers	3,450	210	370
Retail Managers	2,700	110	210
General Clerks	2,590	120	180
Truck Drivers	2,490	120	280
Accountants	2,470	130	330
Packers	2,350	140	200
Office Managers	2,280	40	-90
Advertising and Marketing Professionals	2,240	130	180



Continued from previous page

Occupation	2012-13 employment total	Average annual employment needs	Overall employment growth to 2017-18
Chief Executives and Managing Directors	2,050	120	240
Delivery Drivers	1,820	60	20
Supply and Distribution Managers	1,750	100	250
Bookkeepers	1,680	80	100

VET occupations highlighted in green

Key messages at the occupational level are that there is currently forecast to be substantial employment growth and replacement demand to 2017-18 in:

- Storepersons: projected average annual employment needs of +430, and an estimated overall employment growth of around 560 workers between 2012-13 and 2017-18.
- Sales Representatives: projected average annual employment needs of +410, and an estimated overall employment growth of around 580 workers between 2012-13 and 2017-18.
- Advertising and Sales Managers: +380 on average annually, an estimated overall employment growth of around 820 between 2012-13 and 2017-18.
- Importers, Exporters and Wholesalers: +380 annually and an estimated overall employment growth of around 400 workers between 2012-13 to 2017-18.

There are also a number of occupations where overall employment growth is expected to decline:

- Office Managers are expected to have an overall decline of approximately 90 employees by 2017-18. This is a small percentage considering the current employment level in this occupation is around 2,240, representing an estimated decline of around 4 per cent. Projected average annual employment needs over this period are for approximately 40 workers to replace those leaving in each of these occupations.

## Specialised and in-shortage occupations

This section focuses on current skills shortages in specific occupations related to the Wholesale Trade industry as well as those occupations that are specialised.<sup>4</sup> The Department's analysis of skill shortages considers both quantitative evidence and intelligence gathered through industry consultation.

No skills shortages have been identified in occupations directly aligned to the Wholesale Trade industry. Similarly, no specialised occupations are aligned to this industry. Wholesale Trade is a major employer of skills aligned to the Transport, Postal and Warehousing and Retail Trade industries, however, and is therefore affected by shortages in occupations such as Truck Drivers, Warehouse Administrators and Retail Managers.

Table 3.2 provides a summary of key employing occupations in the Wholesale Trade industry by specialised and in-shortage status.

**Table 3.2: Occupations 'in shortage' or 'specialised'**

Occupation	In shortage	Specialised
Storepersons	No	No
Sales Representatives	No	No
Advertising and Sales Managers	No	No
Purchasing and Supply Logistics Clerks	No	No
Importers, Exporters and Wholesalers	No	No
Accounting Clerks	No	No
Sales Assistants (General)	No	No
Technical Sales Representatives	No	No
Forklift Drivers	No	No
Retail Managers	Yes	No
General Clerks	No	No
Truck Drivers	Yes	No
Accountants	No	Yes
Packers	No	No
Office Managers	No	No
Advertising and Marketing Professionals	No	No
Chief Executives and Managing Directors	No	No
Delivery Drivers	No	No
Supply and Distribution Managers	Yes	No
Bookkeepers	No	No

## Workforce skills needs

- The previous chapter highlights the general trend towards wholesale bypassing and vertical integration of businesses. For example, some large retailers have developed direct wholesaling links to manufacturers and importers, thereby eroding the market power of traditional wholesalers. However, in certain sectors, extensive product and market understanding is valuable, and can save retailers time, with retailers increasingly capitalising on this knowledge.
- Forward integration by wholesalers into retail is expected to gain momentum in the future, and alongside this, many distributors are providing resources to downstream customers in the Retail sector. For example, wholesalers to the Automotive industry are starting to include services such as online resources to simulate car specifications according to buyer preference, assistance in choosing the right finance package and information on special offers.
- A key aspect of industry performance for the Wholesale Trade sector is inventory management. Better inventory management frees tied up capital and increases the efficiency of distribution services. Indeed, in some industries, a 'just in time' approach is becoming more common, to avoid issues of stock price fluctuation.
- The supply chain is vital in enhancing global competitiveness and productivity growth through research, science and innovation, and reducing barriers to accessing international and domestic markets. Skills in understanding and accessing new markets and innovation are especially relevant to food and beverage related Wholesale Trade.
- Food safety standards in wholesalers of food and beverage products and occupational health and safety more generally (key drivers for training) are now the norm, and compliance is required in order to stay in business.

Sources: various IBISWorld reports; Department of State Development, Business and Innovation, Wholesale Trade: Services Sector Industry Analysis, 2012.

# Wholesale Trade vocational training provision

This section focuses on training provided for the Wholesale Trade industry. It covers training activity (including a regional analysis), courses, providers and student characteristics.

## Key messages, issues and challenges

- Across the VET sector as a whole, a number of courses experienced unprecedented high levels of enrolments in 2013. Between 2012 and 2013, there have been shifts towards training delivered in areas that better meet the requirements of the Victorian economy. These trends are reflected in the data for some sections of the Wholesale Trade industry.
- Government subsidised enrolments in Wholesale Trade courses have increased between 2008 and 2013, up by 87 per cent to 1,000.
- Close to 60 per cent of all enrolments supporting the sector in 2012 were in Certificate III-IV, and 39 per cent were in Certificate 1-II in Wholesale Trade.
- Apprentice and trainee enrolments represented close to a third of total enrolments in 2013, having grown by 44 per cent since 2008.
- With the majority of qualifications being undertaken at the Certificate II level, training is being used to support clerical and administrative occupations in the sector, particularly Purchasing Officers.
- In Victoria's regions, Northern Metropolitan Melbourne represented 61 per cent of enrolments aligned to the industry in 2013, increasing significantly from 24 per cent in the previous year. Across regional Victoria, 2013 enrolments made up only 10 per cent of the total. Given the concentration of wholesaling activity in centres such as Geelong, Shepparton, Mildura and Wodonga, training provision may not be fully meeting industry needs in some regional areas.
- A high proportion of students in 2013 quoted that 'Getting Work' was the main reason for undertaking vocational training in courses aligned to the Wholesale Trade industry. This is reflective of the employment status of many Wholesale Trade students, as a relatively high proportion flagged that they were unemployed at the time of enrolment (27 per cent compared with an average of 25 per cent across all industry training).
- Culturally and Linguistically Diverse (CALD) students represented 12 per cent of all 2013 Wholesale Trade related enrolments, well below the average across all industry training in Victoria (25 per cent).
- There are opportunities for training providers to work with businesses in the industry to identify and deliver appropriate training solutions to some of the challenges currently faced by the sector. For example, managing vertical integration, improving inventory management, working more directly with customers, export/import skills and other change management solutions. Some of these solutions may be at a higher qualification level and focus on skills for managerial occupations.

## Training activity

Table 4.1 below gives a summary of training activity for the Wholesale Trade industry over the period 2008 to 2013.

### Enrolments

Government subsidised enrolments in Wholesale Trade courses have increased between 2008 and 2013, up 87 per cent to 1,000. This has been driven largely by enrolments in the Certificate III in Wholesale.

### Apprentices and trainees

There were approximately 350 apprentice and trainee enrolments in courses aligned to Wholesale Trade in 2013, 32 per cent of all enrolments in this industry. Traineeships represented a majority of these enrolments (87 per cent in 2013), with enrolments aligned to the occupation Purchasing Officer accounting for the highest proportion.

Compared to the average across all industries, traineeships represent a relatively high proportion of enrolments in Wholesale Trade – 27 per cent of training delivery compared with an all-industry average of 13 per cent.

### Specialised and in-shortage occupations

No Wholesale Trade occupations have been identified as specialised or experiencing skill shortages in Victoria. Consequently, there were no enrolments in courses aligned to specialised or in-shortage occupation in this industry in 2013.

### Qualification level

A majority of Wholesale Trade enrolments (54 per cent) were at Certificate II level in 2013. Forty-two per cent were at Certificate III-IV level, while Diploma level and above qualifications accounted for just 3 per cent of industry enrolments in 2013.

### Completed qualifications

In 2013, there were 700 reported completions in courses aligned the Wholesale Trade industry - double the number of completions reported in 2012.

**Table 4.1: Key training activity in the Wholesale Trade industry, 2008-2013**

#### Government subsidised enrolments

Industry sub-sector	2008	2009	2010	2011	2012	2013
Basic Material Wholesaling	400	150	150	200	90	50
Motor Vehicle and Motor Vehicle Parts Wholesaling	<10	<10	<10	<10	<10	-
Other Goods Wholesaling	50	90	150	100	90	80
Wholesale Trade (nfd)	100	90	250	550	700	900
Total	550	350	550	850	900	1,000

nfd = not further defined

#### Apprentice or trainee

Industry sub-sector	2008	2009	2010	2011	2012	2013
Apprentice	100	90	100	100	90	40
Trainee	100	100	200	450	550	300
Total	250	200	350	600	650	350

#### Qualification levels – 2013

	Enrolments	% total
Certificate I-II	550	54%
Certificate III-IV	450	42%
Diploma +	30	3%
Total	1,000	100%

## Completed Qualifications

Industry sub-sector	2008	2009	2010	2011	2012	2013
Basic Material Wholesaling	80	90	40	30	30	20
Motor Vehicle and Motor Vehicle Parts Wholesaling	<10	<10	-	<10	<10	-
Other Goods Wholesaling	10	20	40	40	20	20
Wholesale Trade (nfd)	50	80	150	250	300	650
<b>Total</b>	<b>150</b>	<b>200</b>	<b>250</b>	<b>300</b>	<b>350</b>	<b>700</b>

nfd = not further defined

## Courses

A total of nine courses were delivered in the Wholesale Trade industry in 2013, of which the Certificate II in Wholesale attracted the most enrolments, representing a total of 54 per cent of overall Wholesale Trade enrolments.

**Table 4.2: Wholesale Trade qualifications ranked by 2013 enrolments, government subsidised, 2008-2013**

Course name	2008	2009	2010	2011	2012	2013
Certificate II in Wholesale	<10	<10	<10	<10	90	550
Certificate III in Wholesale	10	40	200	550	650	350
Certificate III in Horticulture (Wholesale Nursery)	150	150	150	150	90	50
Certificate IV in Fashion and Textiles Merchandising	-	60	60	40	40	30
Diploma of Fashion and Textiles Merchandising	-	-	<10	20	20	20
Advanced Diploma of Fashion and Textiles Merchandising	-	-	50	30	10	10
Certificate III in Business to Business Sales	-	-	-	-	-	10
Certificate III in Timber Merchandising	10	20	30	20	10	10
Certificate II in Timber Merchandising	30	<10	10	<10	<10	<10

Note: course totals include equivalent superseded courses.

## Enrolments by occupation

The top five Wholesale Trade related occupations accounted for all of Wholesale Trade training delivery in 2013. Purchasing Officer is the largest occupational grouping, having shown very strong growth over the period 2008-2013. Fashion Designer was the second largest occupation in terms of government subsidised training delivery in 2013. Fashion Designer and Purchasing Officer were the only occupations to experience enrolment growth in the industry over the period between 2008 and 2013.

**Table 4.3: Wholesale Trade occupations ranked by 2013 enrolments, government subsidised, 2008-2013**

Occupation	2008	2009	2010	2011	2012	2013
Purchasing Officer	100	90	250	550	700	900
Fashion Designer	<10	70	100	90	70	70
Nurseryperson	150	150	150	150	90	50
Sales Representative (Building and Plumbing Supplies)	50	20	40	20	20	10
Retail Supervisor	-	-	-	-	-	10

See Appendix A for occupations and associated qualifications with funding bands (available for 2012 and 2013).

## Training providers

A total of 30 training providers delivered government subsidised Wholesale Trade sector training 2013, however only eight providers had 20 or more enrolments.

The number of providers delivering government subsidised training has increased marginally from 27 in 2008.

The majority of training is with private providers, who accounted for around 87 per cent of industry enrolments in 2013. TAFE Institutes accounted for 12 per cent of training delivery, while Learn Local provision of Wholesale Trade training comprised less than ten enrolments in 2013.

**Table 4.4: Proportion of enrolments by provider type, government subsidised, 2008-2013**

Provider Type	2008	2009	2010	2011	2012	2013
Private	31%	37%	52%	70%	83%	87%
TAFE	68%	61%	45%	30%	16%	12%
Learn Local	2%	3%	3%	1%	1%	<1%

## Funding patterns

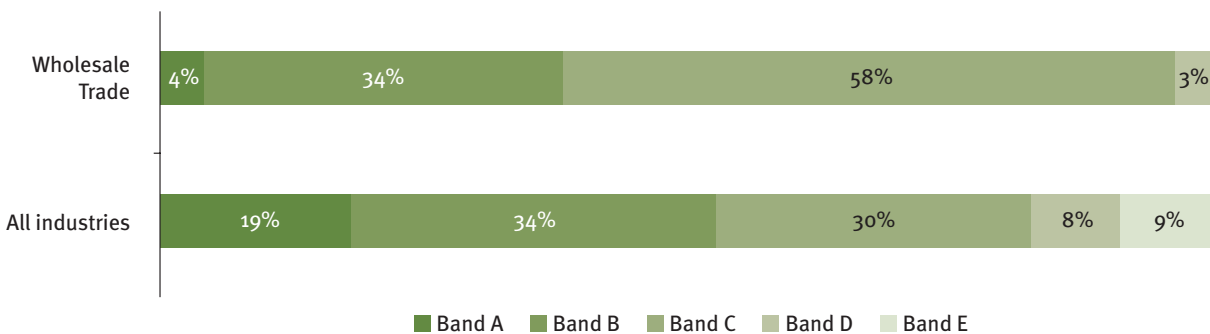
From July 2012 funding bands for government subsidised training were introduced. The allocation of funding bands is designed to better target areas of greatest public benefit and future jobs growth. Where there is not a strong need for Government support the training subsidies are lower.

### Enrolments by funding band

In 2013, 83 per cent of Wholesale Trade training delivery was within Bands A to C. The remaining 3 per cent of enrolments were offered at Band D, while no enrolments were delivered at Band E in 2013.

See Appendix A for a list of courses with associated subsidy bands for 2012 and 2013.

**Figure 4.1: Enrolments by subsidy band, government subsidised, 2013**





## Regional training activity

In 2013, the largest region in terms of Wholesale Trade training delivery was Northern Metropolitan Melbourne, accounting for 61 per cent of industry enrolments. This follows a significant increase from just 24 per cent of training delivery in the previous year. The increase in enrolment was however countered by lower enrolments across all other metropolitan regions.

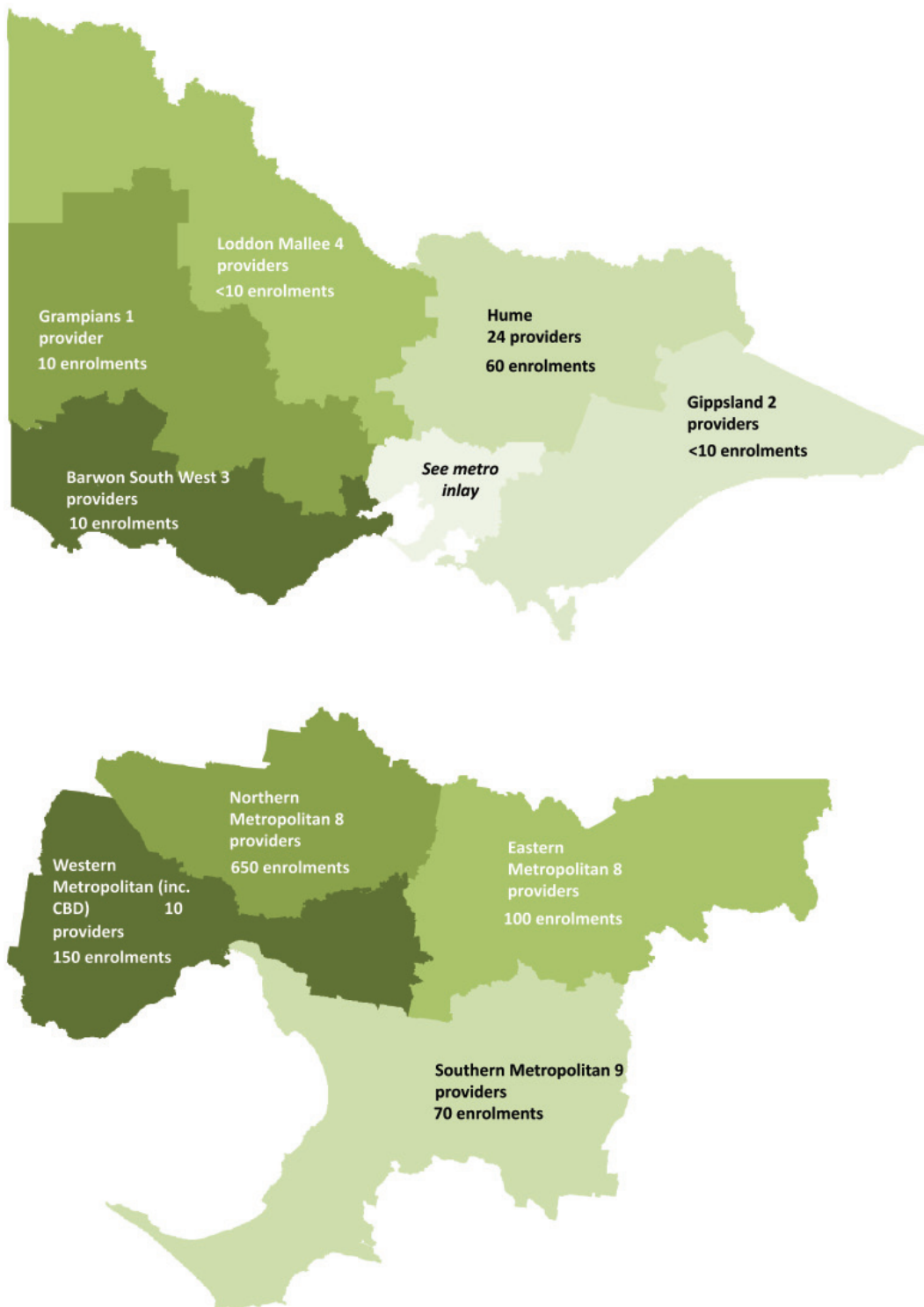
Hume is the largest region for Wholesale Trade training delivery, accounting for 6 per cent of enrolments in 2013. Wholesale Trade training in regional Victoria accounted for just 10 per cent of total training delivery in this industry. Given the concentration of wholesaling activity in centres such as Geelong, Shepparton, Mildura and Wodonga (see Figure 2.4), training provision may not be fully meeting industry needs in some regional areas.

**Table 4.5: Victorian regions ranked by 2013 enrolments, government subsidised, 2008-2013**

Region	2008	2009	2010	2011	2012	2013
Northern Metropolitan	60	120	200	200	200	650
Western Metropolitan	40	20	80	250	200	150
Eastern Metropolitan	90	70	70	200	250	100
Southern Metropolitan	60	70	150	150	150	50
Hume	250	<10	<10	<10	30	60
Grampians	50	30	40	20	20	10
Barwon South West	20	10	10	20	20	10
Gippsland	20	30	10	<10	<10	<10
Loddon Mallee	<10	<10	<10	<10	10	<10

Note: regional enrolment figures sum to slightly more than the overall Victoria-wide figures due to a small number of students undertaking training in campuses in more than one region

Figure 4.2: Wholesale Trade training providers and enrolments, 2013



## Student characteristics

Students from diverse backgrounds engage in vocational training in Wholesale Trade fields.

Students from a Culturally and Linguistically Diverse (CALD) background represent 12 per cent of the student base in this industry, while unemployed students account for 37 per cent of the total. Five per cent of students flagged that they had a disability.

CALD students are relatively under-represented in Wholesale Trade training compared with the average student profile across all industry training, where they represent 25 per cent of the student base. Conversely, unemployed students account for a higher proportion of Wholesale Trade training when compared with the all-industry average of 25 per cent. The number of unemployed students has grown significantly between 2012 and 2013, from 80 to 400.

The age profile of Wholesale Trade students is relatively old when compared with the average student age profile across all industry training. Thirty-seven per cent of students in this industry are aged 25 or older compared with an all-industry average of 56 per cent.

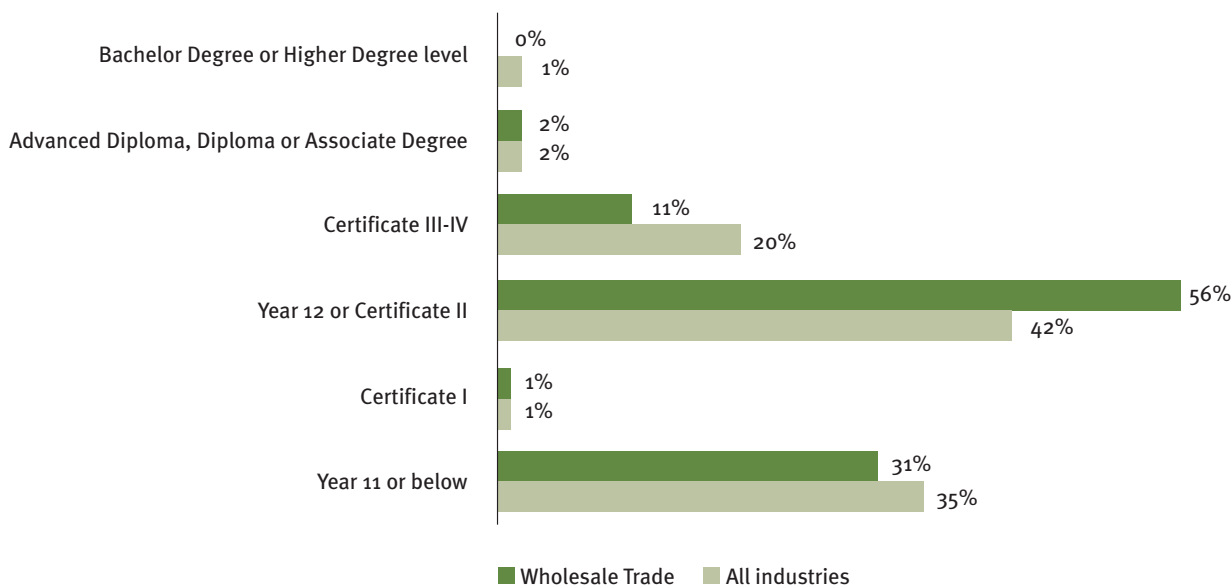
**Table 4.6: Learners Facing Barriers (student numbers), government subsidised, 2008-2013**

Learner Groups	2008	2009	2010	2011	2012	2013
Indigenous	10	<10	<10	10	<10	<10
Disability	40	20	30	80	50	50
CALD	80	50	80	100	100	100
Unemployed	<10	30	40	40	80	400
Age 25 +	400	200	300	600	650	400

At the time of enrolment, students enrolling in Wholesale Trade were typically less qualified than the average across all industries.

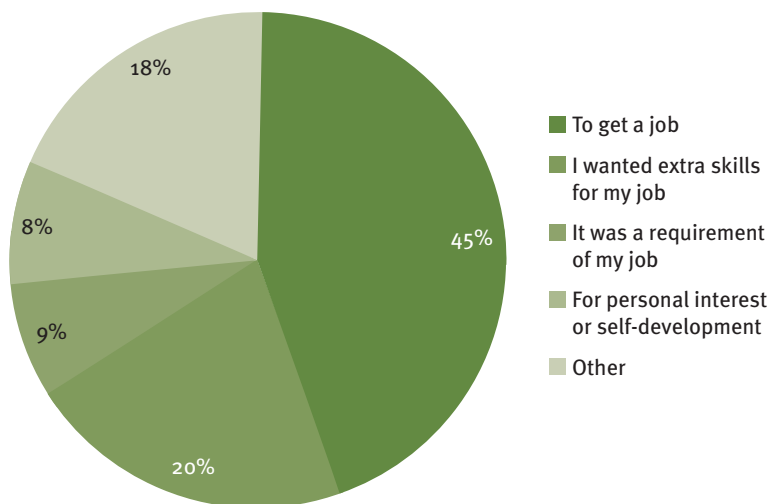
Within the sector, 11 per cent of students had a highest prior qualification of Certificate III or above, compared with 20 per cent across all vocational training students. (See Figure 4.3). Students were more likely than the average across all industries to have completed Year 12 or Certificate II (56 per cent of enrolments compared with 42 per cent).

**Figure 4.3: Vocational training enrolments by highest prior qualification, government subsidised, 2013**



The main reasons students were enrolling in vocational training related to Wholesale Trade were 'To Get Work' (45 per cent), 'Job Skills' (20 per cent) or 'Job Requirement' (16 per cent). 'Personal Interest / Self Development' was also important at 9 per cent.

**Figure 4.4: Vocational training enrolments by reason for study, government subsidised, 2013**



# Appendix A

**Table 5.1: Enrolments by occupation, course and subsidy band, 2012-2013**

Occupation	Course name	Funding band	2012	2013
Fashion Designer	Advanced Diploma of Fashion and Textiles Merchandising	Band D	<10	10
	Certificate IV in Fashion and Textiles Merchandising	Band C	40	30
	Diploma of Fashion and Textiles Merchandising	Band D	20	20
	<b>Total</b>		70	70
Nurseryperson	Certificate III in Horticulture (Wholesale Nursery)	Band B	90	50
	<b>Total</b>		90	50
Purchasing Officer	Certificate II in Wholesale	Band C	90	550
	Certificate III in Wholesale	Band B	650	350
	<b>Total</b>		700	900
Retail Supervisor	Certificate III in Business to Business Sales	Band C	-	10
	<b>Total</b>		-	10
Sales Assistant (General)	Certificate III in Seafood Industry (Sales and Distribution)	Band D	-	<10
	<b>Total</b>		-	<10
Sales Representative (Building and Plumbing Supplies)	Certificate II in Timber Merchandising	Band B	<10	<10
	Certificate III in Timber Merchandising	Band B	10	10
	<b>Total</b>		20	10
Storeperson	Certificate II in Automotive Warehousing /Distribution Operations	Band B	<10	-
	<b>Total</b>		<10	-



