



**Hire
Dynamics**

OPPORTUNITIES. FULFILLED.



**QUARTERLY
MARKET REPORT:
LOGISTICS/E-COMMERCE**

Q1 2022

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1

Total Nonfarm Employment Rose by 210,000 in November; The National Unemployment Rate Declined Notably to 4.2%

The job gain of 210,000 in November was below analyst predictions of 573,000 (Wall Street Journal), but other elements of the jobs report were quite positive – including, the labor force participation rate ticked up to 61.8 percent and the unemployment rate dropped significantly from 4.6 percent to 4.2 percent.

The shortage of candidates continues to be a headwind across many skill segments of the U.S. staffing industry, but the overall economic growth environment remains strong and will provide a solid footing for continued high levels of job openings and demand for staffing industry services.

Source: [Staffing Industry Analysts, Bureau of Labor Statistics](#)

2

Unemployment Rates Were Lower in October Than a Year Earlier in 386 of the 389 Metropolitan Areas

A total of 110 areas had jobless rates of less than 3.0 percent. Nonfarm payroll employment increased over the year in 96 metropolitan areas and was essentially unchanged in 293 areas.

Source: [U.S. Bureau of Labor Statistics](#)

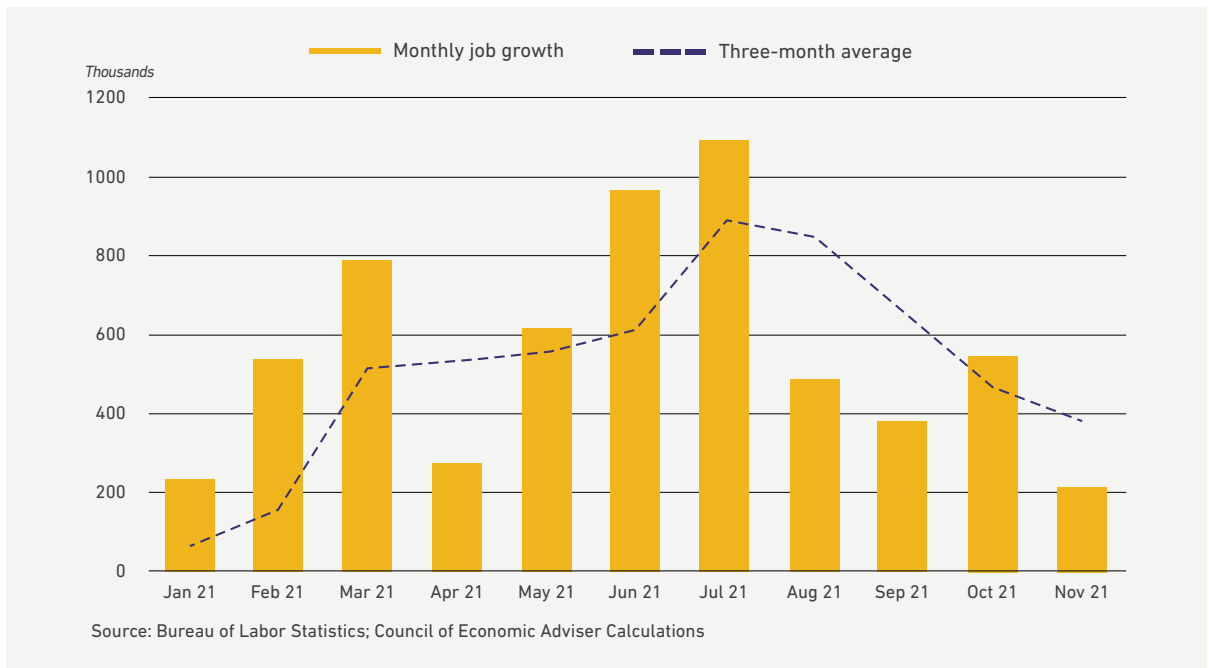
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Job Growth Over the Last Three Months Has Averaged 378,000, A Solid Pace

In addition to the November job adds, the unemployment rate fell by 0.4 percentage point to 4.2 percent as labor force participation rose and the employment rate reached a new pandemic recovery high. This is the lowest the unemployment rate has been since the pandemic began. Wages rose by 0.3 percent over the month, for an increase of 4.8 percent year-over-year. Wage growth has been relatively rapid in recent months as employers try to hire as the economy recovers.

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2011	9.1	9.0	9.0	9.1	9.0	9.1	9.0	9.0	9.0	8.8	8.6	8.5
2012	8.3	8.3	8.2	8.2	8.2	8.2	8.2	8.1	7.8	7.8	7.7	7.9
2013	8.0	7.7	7.5	7.6	7.5	7.5	7.3	7.2	7.2	7.2	6.9	6.7
2014	6.6	6.7	6.7	6.2	6.3	6.1	6.2	6.1	5.9	5.7	5.8	5.6
2015	5.7	5.5	5.4	5.4	5.6	5.3	5.2	5.1	5.0	5.0	5.1	5.0
2016	4.8	4.9	5.0	5.1	4.8	4.9	4.8	4.9	5.0	4.9	4.7	4.7
2017	4.7	4.6	4.4	4.5	4.4	4.3	4.3	4.4	4.2	4.1	4.2	4.1
2018	4.0	4.1	4.0	4.0	4.8	4.0	3.8	3.8	3.7	3.8	3.8	3.9
2019	4.0	3.8	3.8	3.7	3.7	3.6	3.6	3.7	3.5	3.6	3.6	3.6
2020	3.5	3.5	4.4	14.8	13.3	11.1	10.2	8.4	7.8	6.9	6.7	6.7
2021	6.3	6.2	6.0	6.1	5.8	5.9	5.4	5.2	4.8	4.6	4.2	

Job growth from September to November averaged 378,000 jobs per month, but the labor market has not fully recovered: employment remains about 3.9 million jobs (2.6 percent) below the pre-pandemic level.



Source: [The White House](#), [U.S. Bureau of Labor Statistics](#)

The Conference Board Employment Trends Index™ (ETI) Increased in November

- The Conference Board Employment Trends Index™ (ETI) increased slightly in November. The index now stands at 114.49, up from 113.03 in October (an upward revision).
- November's increase in the Employment Trends Index was driven by positive contributions from six of eight components. From the largest positive contributor to the smallest, these were: Initial Claims for Unemployment Insurance; Industrial Production; Ratio of Involuntarily Part-time to All Part-time Workers; Job Openings; Number of Temporary Employees; and Real Manufacturing and Trade Sales. The two components that made negative contributions in November were Percentage of Firms With Positions Not Able to Fill Right Now and Percentage of Respondents Who Say They Find "Jobs Hard to Get."

Source: [The Conference Board](#)

Consumer Confidence Declined in November

Consumers' appraisal of current business conditions was less favorable in November.



17.0% of consumers said business conditions are "good," down from **18.3%**.



29.0% of consumers said business conditions are "bad," up from **25.7%**.

Consumers' assessment of the labor market was moderately more favorable.



58.0% of consumers said jobs are "plentiful," up from **54.8%**.



Conversely, **11.1%** of consumers said jobs are "hard to get," virtually unchanged from **11.0%**.

Consumers' optimism about the short-term business conditions outlook increased in November.



24.1% of consumers expect business conditions will improve, up from **22.7%**.



20.7% expect business conditions to worsen, down from **21.9%**.

Consumers were less optimistic about the short-term labor market outlook.



22.1% of consumers expect more jobs to be available in the months ahead, down from **24.4%**.



18.9% anticipate fewer jobs, up slightly from **18.7%**.

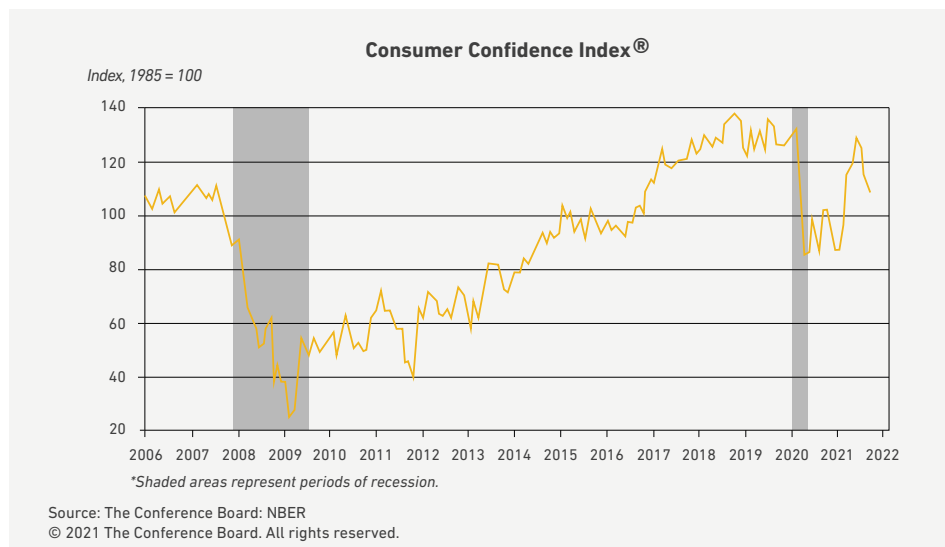
Consumers were less positive about their short-term financial prospects.



17.9% of consumers expect their incomes to increase, down from **18.4%**.



12.0% expect their incomes will decrease, up from **11.2%**.



Global Logistics Market Report 2021-2029

Highlights from ResearchAndMarkets.com's "Logistics Market Report 2021 to 2029" report:

- The advancements in technology coupled with growing awareness regarding the benefits offered by supply chain management solutions among shippers bode well for the market growth.
- In addition, the proliferation of e-commerce and consequent need for multi-channel distribution is aiding the logistics market worldwide. These factors are expected to contribute towards 6.5 percent CAGR during the forecast period 2021-2029.
- On the contrary, the limited workforce of truck drivers remains a major concern for roadway transportation and logistics service providers and their shippers.
- The prevailing trend towards omni-channel distribution, especially in e-commerce, has had positive impact on the growth of the overall logistics market.
- Roadway logistics covering logistics by trailer, truck-trailer, flatbed truck, refrigerated truck, and lorry tank among others represented the largest segment in the global logistics market in 2019. The segment accounted for over 40 percent of the overall logistics market revenue in the same year (2019). The trend shall prolong, and the segment is presumed to hold on to its leading position by 2029. Investments made by the government, especially in emerging economies for the development of road infrastructure and ensure connectivity between rural and urban areas has been instrumental in driving roadway transportation. In addition, benefits offered in terms accessibility, reliability, flexibility of operations, and service makes roadway a preferred mode of transport across the globe.
- In terms of volume, waterway logistics led the overall logistics market worldwide and is expected to remain the dominant segment by 2029.

Source: [ResearchAndMarkets.com](https://www.researchandmarkets.com)

The E-commerce Fulfillment Fastlane

- The market is flooded with volume as demand continues to increase month over month at unprecedented growth rates for direct-to-consumer e-commerce.
- Retailers vying to be the go-to brand among consumers are especially pushing logistics providers hard for services such as speed, flexibility, choice, cost and overall customer satisfaction. Cross-channel shopping options and a seamless customer experience, no matter where or when consumers are shopping, is the expectation today. The expertise of third-party logistics (3PLs) can help shippers cut costs, manage complex functions and implement innovative logistics technologies.
- Armstrong & Associates (A&A), a third-party logistics consulting and market research company, pegs e-commerce as the most rapidly growing 3PL market segment and estimates U.S. 3PL e-commerce revenues reached \$53.3 billion in 2020, producing a three-year compound annual growth rate (CAGR) of 28 percent as e-commerce purchases exploded during the pandemic. A&A estimates e-commerce reverse logistics to grow at a rate of more than 20 percent per year.

Source: [*Supply Chain Management Review Magazine*](#)

How e-Commerce Fulfillment Centers Can Overcome COVID-Related Challenges

- The growth rate of U.S. e-commerce sales nearly tripled in 2020, putting new strains on fulfillment centers. In their latest guidebook, the leading automated storage solutions manufacturer Modula explored how automation is helping warehouses and distribution centers perform effectively and efficiently to capitalize on the growing e-commerce opportunities.
- According to Modula, the sharp rise in e-commerce sales has compounded the pressures warehouses and distribution centers had already struggled with including labor shortage, transition to “pick by each” fulfillment, and omnichannel distribution – to name a few.
- Fulfillment centers have also had to adapt to the changing consumer expectation for faster and impeccable order delivery.
- e-Grocery businesses have been particularly affected by the changing industry landscape and consumer behavior. Online shopping now accounts for 25 percent of an average grocer’s business, up from 3 percent pre-COVID (Modula).

- How fulfillment centers can overcome COVID-related challenges:
 - o **Automation:** Grocers, retailers, B2B brands and other e-commerce businesses have turned to automation to resolve chronic warehousing and distribution challenges, but more is needed.
 - o **A response plan for staffing shortages:** The near-100 percent warehouse staff turnover rate is a clear indicator of the growing disinterest in warehouse-type jobs. By automating repetitive manual processes and improving warehouse efficiency, automation, like Vertical Lift Modules (VLMs) and Horizontal Carousels (HCs), allow businesses to redirect their valuable, hard-to-find labor resources to more important tasks.
 - o **Flexibility:** fulfillment centers need flexibility now more than ever, especially as COVID-19 continues to wreak havoc on the supply chain.

Source: [Yahoo! Finance](#)



TRENDS BY STATE

Alabama Supply & Demand

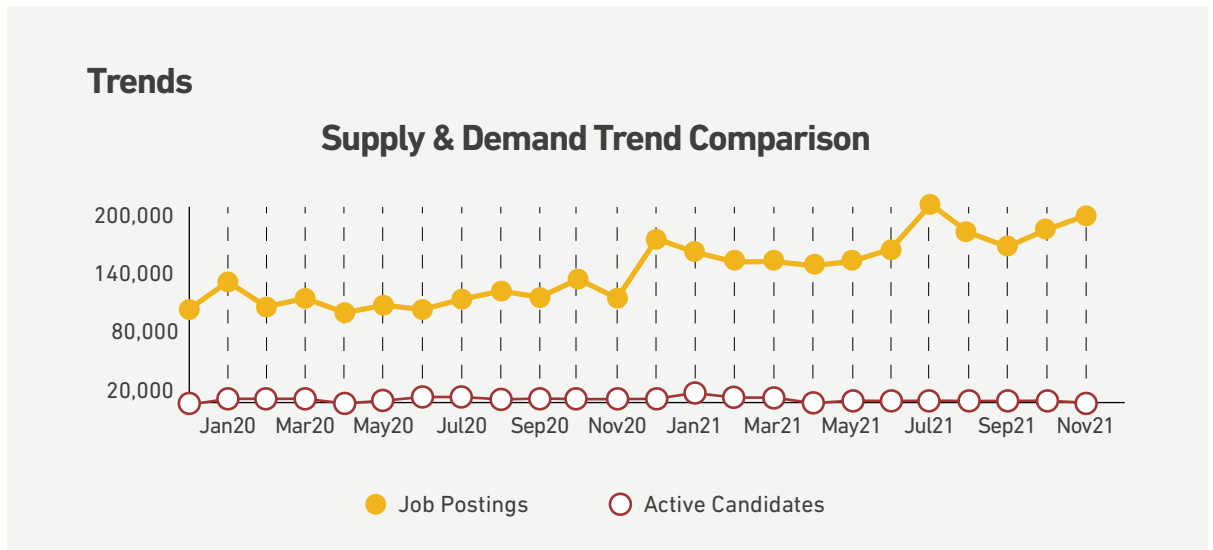
Executive Summary: Alabama

- The median candidate has 6-10 years of experience.
- The median candidate's highest level of education is associate degree.
- The cities where candidates most frequently live are Birmingham, AL and Huntsville, AL.

Alabama – Overview

Candidates: 285,902 (Difference from last quarter's market report: -1.77%)

Job Postings: 3,398,928 (Difference from last quarter's market report: +4.97%)



Alabama – Logistics E-Commerce, including warehouse, fulfillment and distribution candidates and job postings

Candidates: 26,197 (Difference from last quarter's market report: -4.58%)

Job Postings: 63,235 (Difference from last quarter's market report: +10.52%)

Executive Summary: Logistics E-Commerce in Alabama

- The median candidate has 6-10 years of experience.
- The median candidate's highest level of education is high school.
- Seventy-five percent (75%) of candidates are male and 25 percent are female.
- The cities where candidates most frequently live are Birmingham, AL and Montgomery, AL.

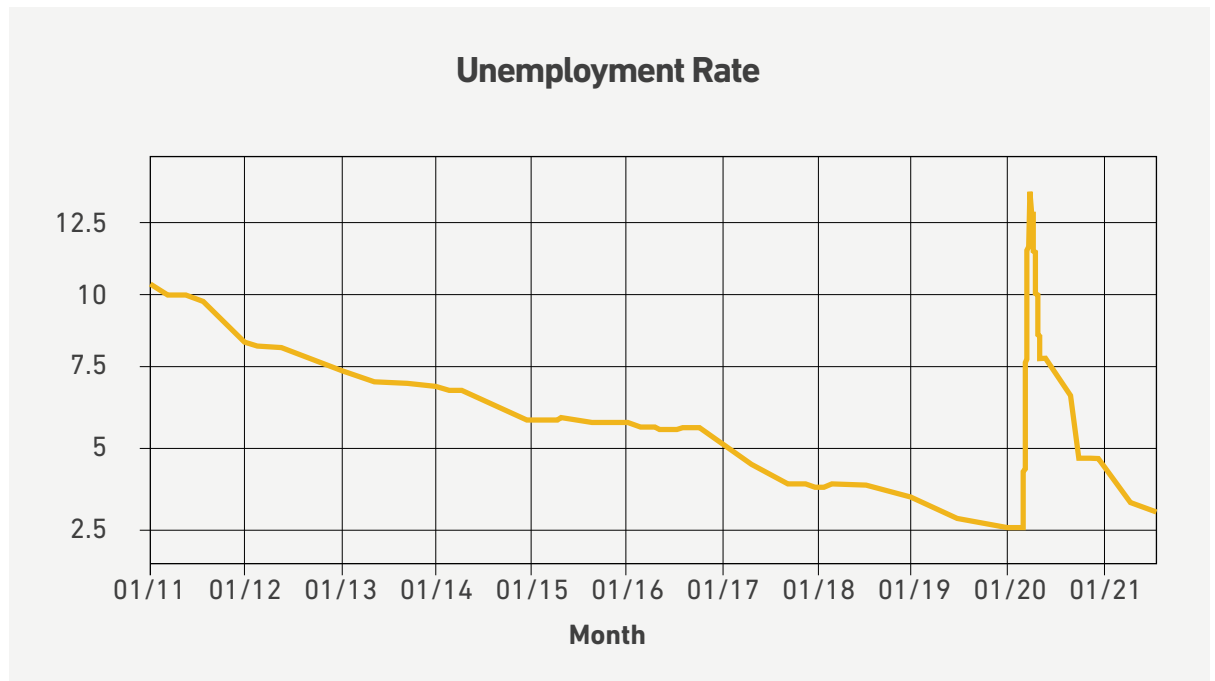
Top Logistics E-Commerce Job Titles in Alabama:

1. Warehouse Worker (Office and Administrative Support)
2. Warehouse Worker (Transportation and Material Moving)
3. Material Handler (Transportation and Material Moving)
4. Packer
5. Warehouse Driver

Source: [CareerBuilder Supply & Demand](#)

Alabama Unemployment Rate

November 2021: 3.1 percent (Difference from last quarter's market report: **unchanged**, August 2021)



Source: [U.S. Bureau of Labor Statistics](#)

Georgia Supply & Demand

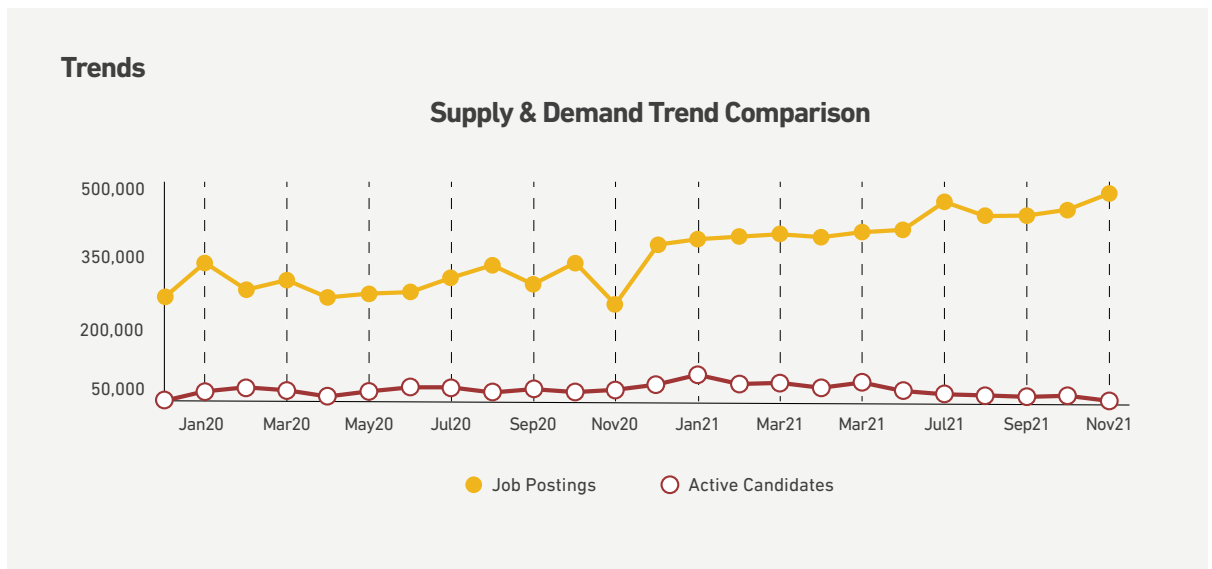
Executive Summary: Georgia

- The median candidate has 6-10 years of experience.
- The median candidate's highest level of education is bachelor's degree.
- Fifty-one percent (51%) of candidates are male and 49 percent are female.
- The cities where candidates most frequently live are Atlanta, GA and Augusta, GA.

Georgia – Overview

Candidates: 1,116,831 (Difference from last quarter's market report: -1.43%)

Job Postings: 7,327,556 (Difference from last quarter's market report: +4.52%)



Georgia – Logistics E-Commerce, including warehouse, fulfillment and distribution candidates and job postings

Candidates: 91,917 (Difference from last quarter's market report: -3.07%)

Job Postings: 164,309 (Difference from last quarter's market report: +9.88%)

Executive Summary: Logistics E-Commerce in Georgia

- The median candidate has 6-10 years of experience.
- The median candidate's highest level of education is high school.
- Sixty-nine percent (69%) of candidates are male and 31 percent are female.
- The cities where candidates most frequently live are Atlanta, GA and Forest Park, GA.

Top Logistics E-Commerce Job Titles in Georgia:

1. Warehouse Worker (Office and Administrative Support)
2. Warehouse Worker (Transportation and Material Moving)
3. Material Handler (Transportation and Material Moving)
4. Packer
5. Warehouse Driver

Source: [CareerBuilder Supply & Demand](#)

Georgia Unemployment Rate

November 2021: 2.8 percent (Difference from last quarter's market report: -0.7 percent; August 2021: 3.5 percent)



Source: [U.S. Bureau of Labor Statistics](#)

Illinois Supply & Demand

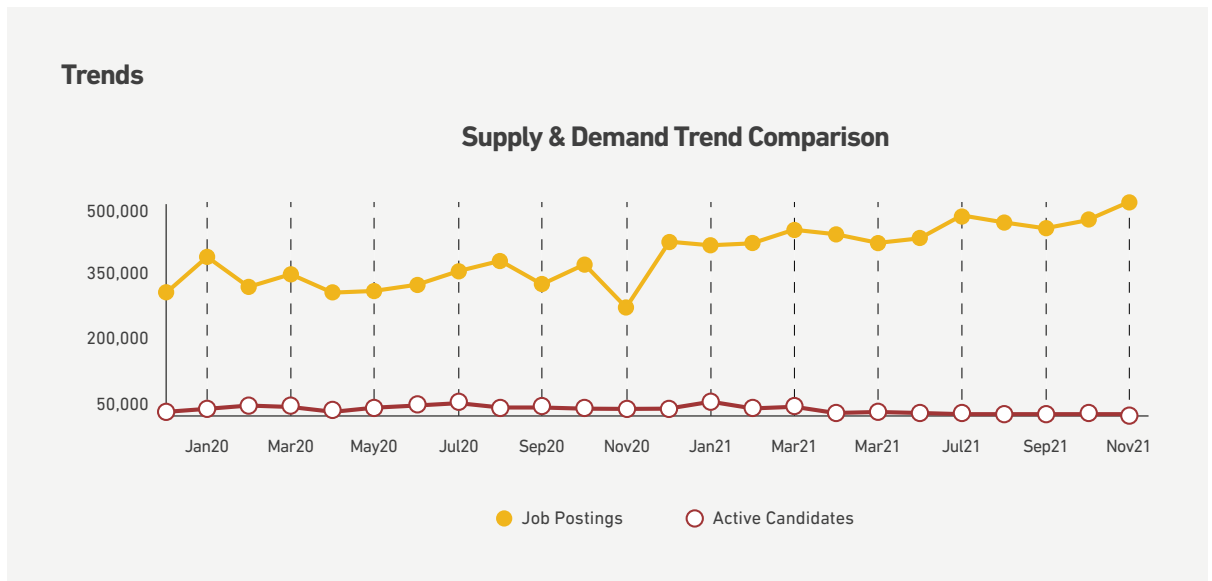
Executive Summary: Illinois

- The median candidate has 6-10 years of experience.
- The median candidate's highest level of education is bachelor's degree.
- Fifty-three percent (53%) of candidates are male and 47 percent are female.
- The cities where candidates most frequently live are Chicago, IL and Aurora, IL.

Illinois – Overview

Candidates: 720,440 (Difference from last quarter's market report: -2.98%)

Job Postings: 9,439,285 (Difference from last quarter's market report: +3.07%)



Illinois – Logistics E-Commerce, including warehouse, fulfillment and distribution candidates and job postings

Candidates: 64,646 (Difference from last quarter's market report: -3.03%)

Job Postings: 242,579 (Difference from last quarter's market report: +9.24%)

Executive Summary: Logistics E-Commerce in Illinois

- The median candidate has 6-10 years of experience.
- The median candidate's highest level of education is associate degree.
- Seventy-four percent (74%) of candidates are male and 26 percent are female.
- The cities where candidates most frequently live are Chicago, IL and Monee, IL.

Top Logistics E-Commerce Job Titles in Illinois:

1. Warehouse Worker (Transportation and Material Moving)
2. Warehouse Worker (Office and Administrative Support)
3. Material Handler (Transportation and Material Moving)
4. Packer
5. Package Handler

Source: [CareerBuilder Supply & Demand](#)

Illinois Unemployment Rate

November 2021: 5.7 percent (Difference from last quarter's market report: -1.3 percent; August 2021: 7.0 percent)



Source: [U.S. Bureau of Labor Statistics](#)

North Carolina Supply & Demand

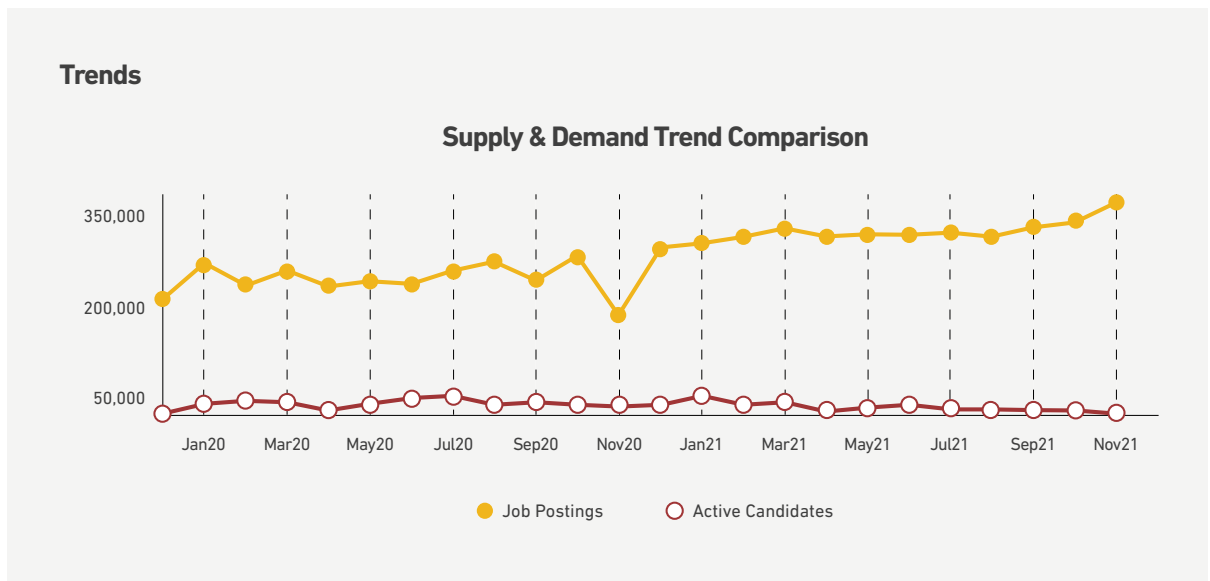
North Carolina Supply & Demand

- The median candidate has 6-10 years of experience.
- The median candidate's highest level of education is bachelor's degree.
- Fifty-two percent (52%) of candidates are male and 48 percent are female.
- The cities where candidates most frequently live are Charlotte, NC and Raleigh, NC.

North Carolina – Overview

Candidates: 793,080 (Difference from last quarter's market report: -2.21%)

Job Postings: 6,845,466 (Difference from last quarter's market report: +3.41%)



North Carolina – Logistics E-Commerce, including warehouse, fulfillment and distribution candidates and job postings

Candidates: 75,843 (Difference from last quarter's market report: -3.04%)

Job Postings: 133,541 (Difference from last quarter's market report: +9.98%)

Executive Summary: Logistics E-Commerce in North Carolina

- The median candidate has 6-10 years of experience.
- The median candidate's highest level of education is high school.
- Sixty-eight percent (68%) of candidates are male and 32 percent are female.
- The cities where candidates most frequently live are Charlotte, NC and Greensboro, NC.

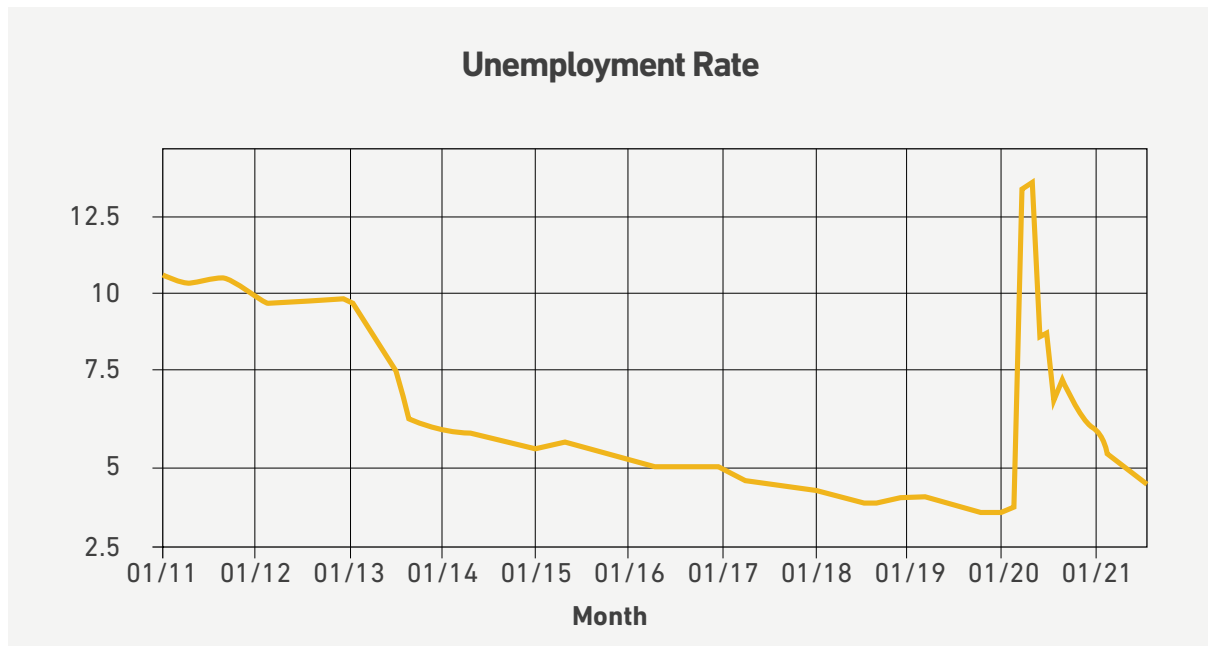
Top Logistics E-Commerce Job Titles in North Carolina:

1. Warehouse Worker (Office and Administrative Support)
2. Warehouse Worker (Transportation and Material Moving)
3. Material Handler (Transportation and Material Moving)
4. Package Handler
5. Product Manager (Management)

Source: [CareerBuilder Supply & Demand](#)

North Carolina Unemployment Rate

November 2021: 3.9 percent (Difference from last quarter's market report: -0.4 percent; August 2021: 4.3 percent)



Source: [U.S. Bureau of Labor Statistics](#)

South Carolina Supply & Demand

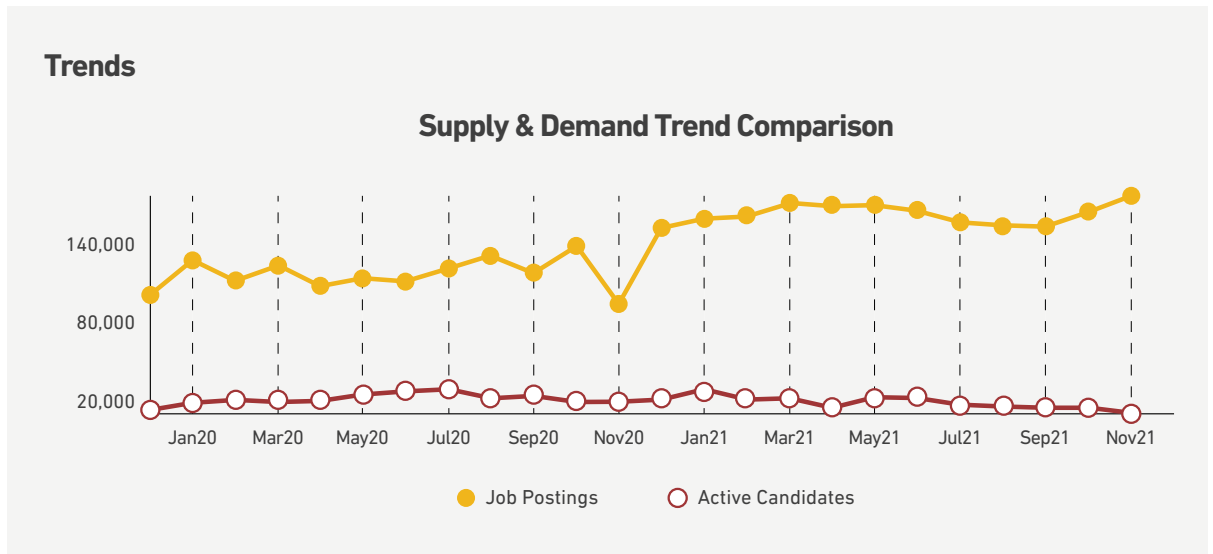
Executive Summary: South Carolina

- The median candidate has 6-10 years of experience.
- The median candidate's highest level of education is associate degree.
- Fifty-one percent (51%) of candidates are male and 49 percent are female.
- The cities where candidates most frequently live are Columbia, SC and Greenville, SC.

South Carolina – Overview

Candidates: 437,356 (Difference from last quarter's market report: -2.27%)

Job Postings: 3,354,108 (Difference from last quarter's market report: +3.03%)



South Carolina – Logistics E-Commerce, including warehouse, fulfillment and distribution candidates and job postings

Candidates: 47,771 (Difference from last quarter's market report: -3.3%)

Job Postings: 58,133 (Difference from last quarter's market report: +8.75%)

Executive Summary: Logistics E-Commerce in South Carolina

- The median candidate has 6-10 years of experience.
- The median candidate's highest level of education is high school.
- Sixty-one percent (61%) of candidates are male and 39 percent are female.
- The cities where candidates most frequently live are West Columbia, SC and Spartanburg, SC.

Top Logistics E-Commerce Job Titles in South Carolina:

1. Warehouse Worker (Office and Administrative Support)
2. Warehouse Worker (Transportation and Material Moving)
3. Material Handler (Transportation and Material Moving)
4. Warehouse Driver
5. Package Handler

Source: [CareerBuilder Supply & Demand](#)

South Carolina Unemployment Rate

November 2021: 3.7 percent (Difference from last quarter's market report: -0.5 percent; August 2021: 4.2 percent)



Source: [U.S. Bureau of Labor Statistics](#)

Tennessee Supply & Demand

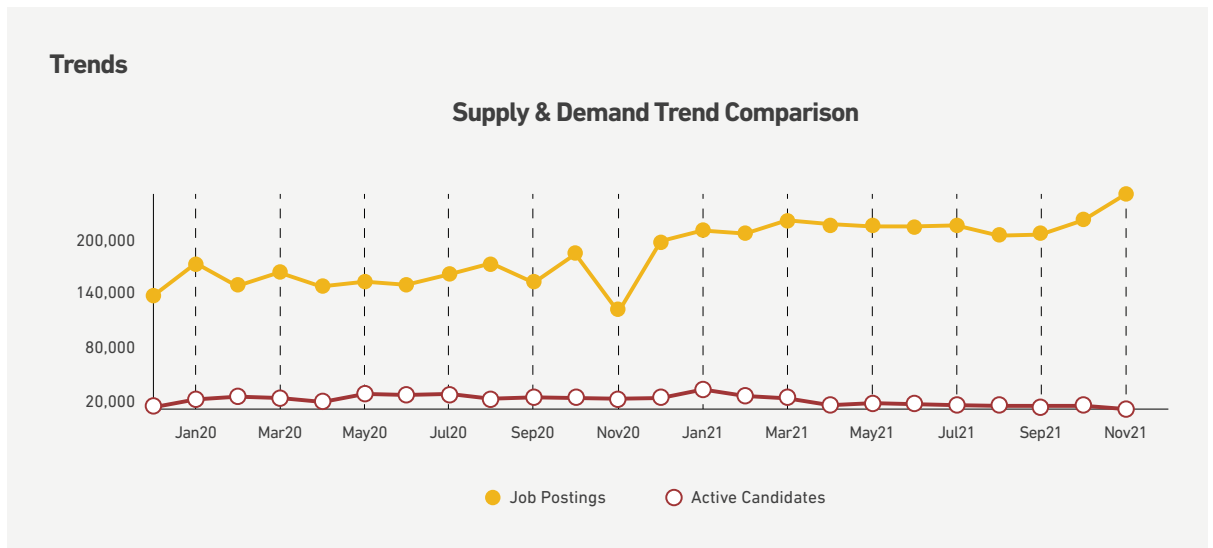
Executive Summary: Tennessee

- The median candidate has 6-10 years of experience.
- The median candidate's highest level of education is bachelor degree.
- The cities where candidates most frequently live are Memphis, TN and Nashville, TN.

Tennessee – Overview

Candidates: 483,571 (Difference from last quarter's market report: -2.08%)

Job Postings: 4,446,865 (Difference from last quarter's market report: +3.48%)



Tennessee – Logistics E-Commerce, including warehouse, fulfillment and distribution candidates and job postings

Candidates: 46,640 (Difference from last quarter's market report: -3.71%)

Job Postings: 108,715 (Difference from last quarter's market report: +11.99%)

Executive Summary: Logistics E-Commerce in Tennessee

- The median candidate has 6-10 years of experience.
- The median candidate's highest level of education is high school.
- Sixty-five percent (65%) of candidates are male and 35 percent are female.
- The cities where candidates most frequently live are Memphis, TN and Nashville, TN.

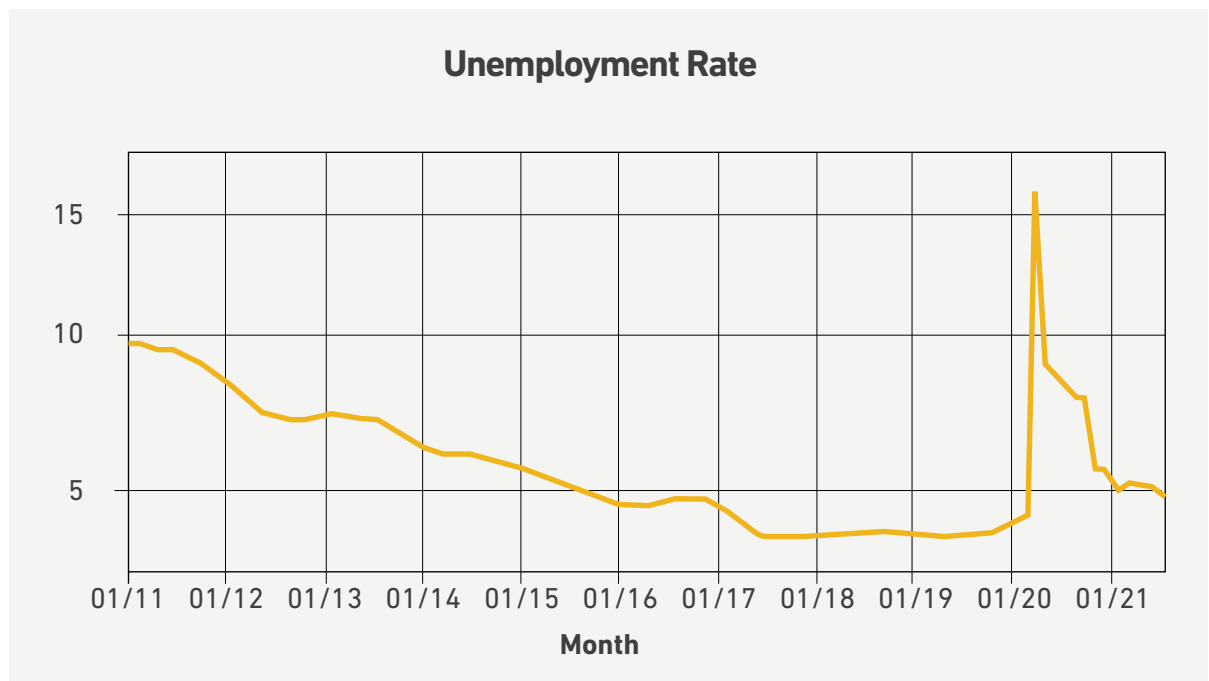
Top Logistics E-Commerce Job Titles in Tennessee:

1. Warehouse Worker (Office and Administrative Support)
2. Warehouse Worker (Transportation and Material Moving)
3. Material Handler (Transportation and Material Moving)
4. Packer
5. Package Handler

Source: [CareerBuilder Supply & Demand](#)

Tennessee Unemployment Rate

November 2021: 4.0 percent (Difference from last quarter's market report: -0.6 percent; August 2021: 4.6 percent)



Source: [U.S. Bureau of Labor Statistics](#)

Texas Supply & Demand

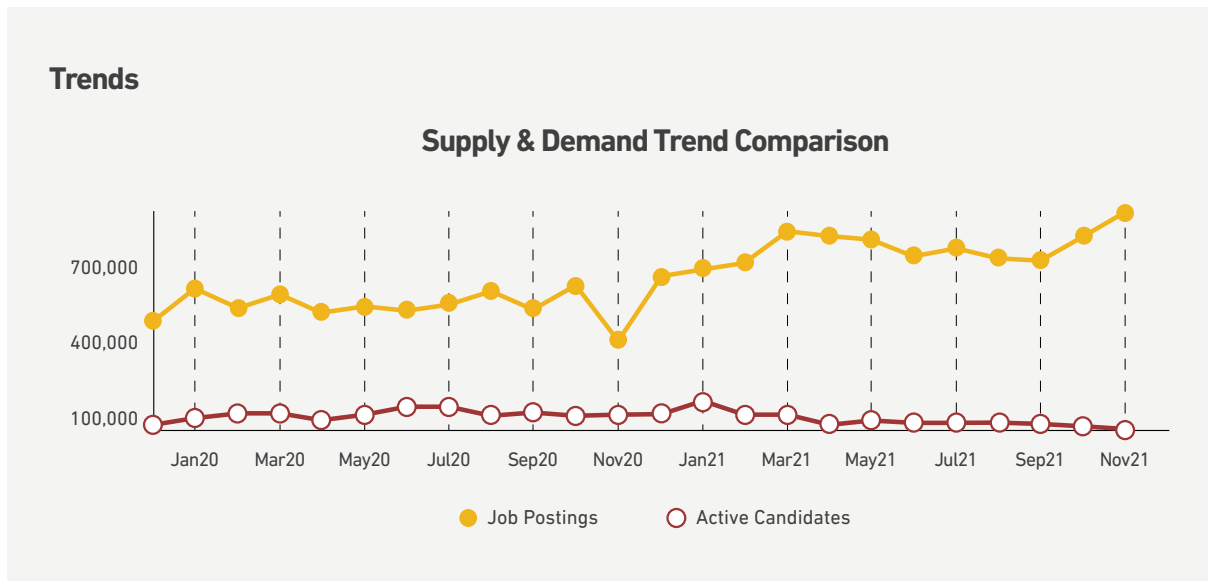
Executive Summary: Texas

- The median candidate has 6-10 years of experience.
- The median candidate's highest level of education is bachelor's degree.
- Fifty-two percent (52%) of candidates are male and 48 percent are female.
- The cities where candidates most frequently live are Houston, TX and San Antonio, TX.

Texas – Overview

Candidates: 2,251,093 (Difference from last quarter's market report: -2.45%)

Job Postings: 15,775,050 (Difference from last quarter's market report: +3.87%)



Texas – Logistics E-Commerce, including warehouse, fulfillment and distribution candidates and job postings

Candidates: 188,428 (Difference from last quarter's market report: -3.91%)

Job Postings: 289,641 (Difference from last quarter's market report: +8.71%)

Executive Summary: Logistics E-Commerce in Texas

- The median candidate has 6-10 years of experience.
- The median candidate's highest level of education is high school.
- Seventy-one percent (71%) of candidates are male and 29 percent are female.
- The cities where candidates most frequently live are Houston, TX and Dallas, TX.

Top Logistics E-Commerce Job Titles in Texas:

1. Warehouse Worker (Office and Administrative Support)
2. Warehouse Worker (Transportation and Material Moving)
3. Material Handler (Transportation and Material Moving)
4. Shipping and Receiving Clerk
5. Warehouse Driver

Source: [CareerBuilder Supply & Demand](#)

Texas Unemployment Rate

November 2021: 5.2 percent (Difference from last quarter's market report: -0.7 percent; August 2021: 5.9 percent)



Virginia Supply & Demand

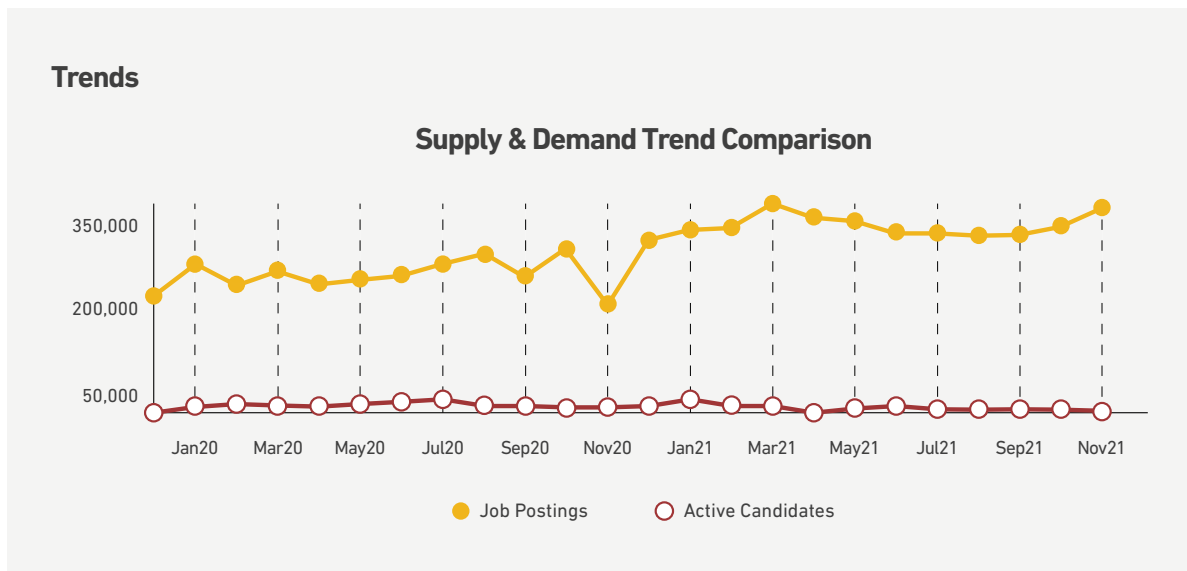
Executive Summary: Virginia

- The median candidate has 6-10 years of experience.
- The median candidate's highest level of education is bachelor's degree.
- Fifty-four percent (54%) of candidates are male and 46 percent are female.
- The cities where candidates most frequently live are Richmond, VA and Alexandria, VA.

Virginia – Overview

Candidates: 576,116 (Difference from last quarter's market report: -1.78%)

Job Postings: 7,300,078 (Difference from last quarter's market report: +2.84%)



Virginia – Logistics E-Commerce, including warehouse, fulfillment and distribution candidates and job postings

Candidates: 47,520 (Difference from last quarter's market report: -3.04%)

Job Postings: 114,783 (Difference from last quarter's market report: +7.63%)

Executive Summary: Logistics E-Commerce in Virginia

- The median candidate has 6-10 years of experience.
- The median candidate's highest level of education is associate degree.
- Sixty-eight percent (68%) of candidates are male and 32 percent are female.
- The cities where candidates most frequently live are Richmond, VA and Norfolk, VA.

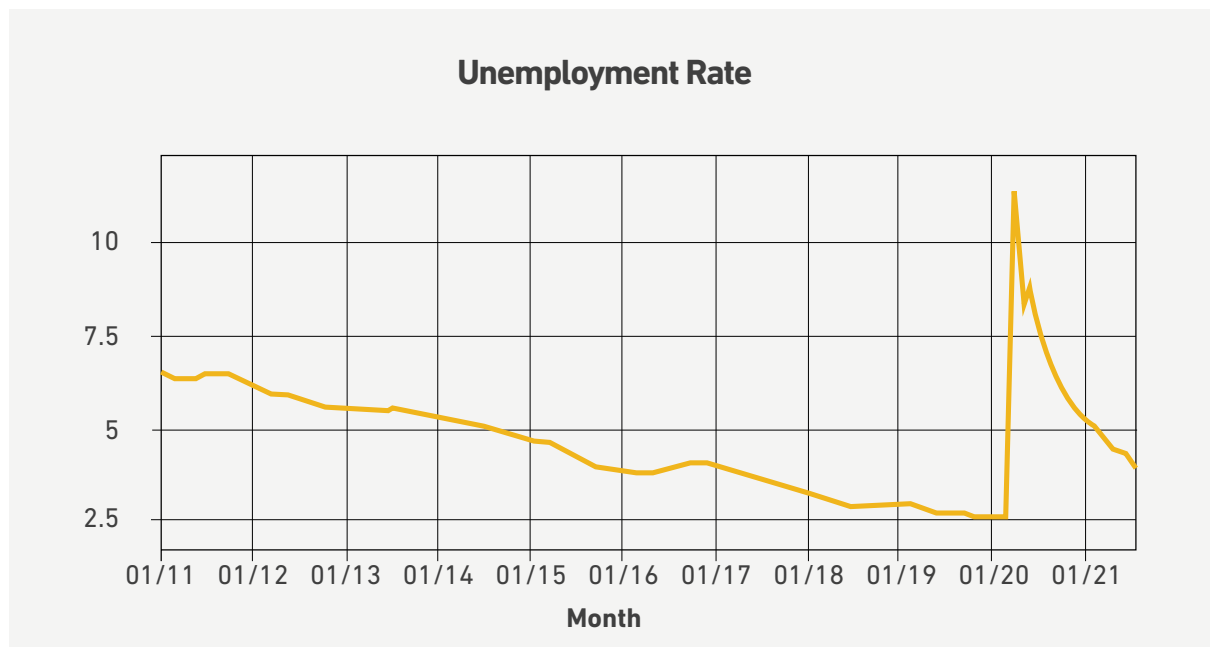
Top Logistics E-Commerce Job Titles in Virginia:

1. Warehouse Worker (Office and Administrative Support)
2. Warehouse Worker (Transportation and Material Moving)
3. Material Handler (Transportation and Material Moving)
4. Product Manager (Management)
5. Package Handler

Source: [CareerBuilder Supply & Demand](#)

Virginia Unemployment Rate

November 2021: 3.4 percent (Difference from last quarter's market report: -0.6 percent; August 2021: 4.0 percent)



Source: [U.S. Bureau of Labor Statistics](#)

Prepared December 23-29, 2021