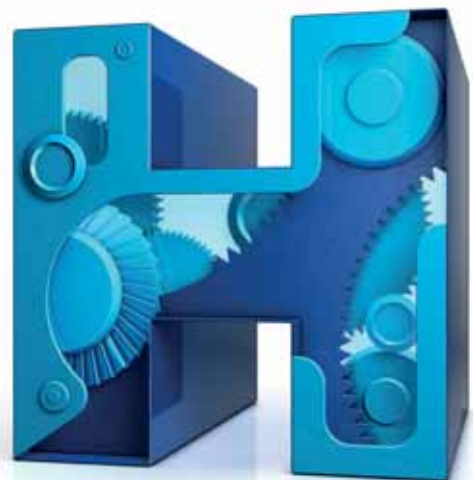




HAYS Recruiting experts
in Manufacturing & Operations

MANUFACTURING INDUSTRY OF CHINA EMPLOYMENT OUTLOOK

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FOREWORD



Simon Lance
Managing Director
Hays China

Over the last 30 years, China's manufacturing industry has grown to global dominance. In 2011, China overtook the United States to become the world's largest producer of manufactured goods. China has also used its manufacturing engine to boost living standards by doubling the country's GDP per capita over the last decade: in 2012 the industry accounted for almost half of China's total GDP. After about 30 years of explosive growth, however, China has begun looking for new ways to generate growth in the industry. Specifically, China is seeking to upgrade and improve its manufacturing through a shift towards sustainability and innovation.

Through this maturation of its manufacturing industry, China plans to upgrade its capabilities, look upstream into research and development (R&D) and innovation, and to make an overall shift from not only largest but also strongest. Against this transforming backdrop, we conducted an in-depth survey of industry and area professionals in the manufacturing and operations industry.

At Hays, we are very proud of the strong relationships we have with these professionals. We're also proud of our commitment to providing valuable insights that benefit individuals at every level of their careers in this industry. It was for this reason that we decided to uncover the most encouraging and challenging aspects within manufacturing and operations and associated key opportunities for continued progress in the area.

If you are considering becoming more involved in the manufacturing and operations industry in China, we hope that this report will be a useful guide for your decision making. If you are already engaged in the industry, we hope you find your peers' opinions to be both practical and insightful. Over the next few pages, you can learn the key findings from this report and what we should expect from the industry based on these conclusions.

Report Methodology

1,584 professionals were surveyed between August and September 2015, all of whom worked in the manufacturing and operations industry. Respondents were based across Shanghai (54%), Suzhou (17%), Beijing (16%) and Guangzhou (12%). These professionals were asked about their organization headcount growth, years of working experience, job satisfaction, recruitment and retention challenges, salary expectations and personal aspirations.

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KEY FINDINGS


China's maturing economy has affected different sectors within the manufacturing industry in varying ways. The recent slowdown has influenced heavy sub-industries in particular; those such as automotive and automobile suppliers, energy, or machinery have experienced somewhat stagnant growth. On the other hand, sectors that cater to consumer needs such as healthcare, medical devices, and consumer goods are booming.


Job Market Landscape

Most companies are expecting their headcount to remain stable over the next year, with some sectors expanding in particular. The vast majority of respondents are willing to relocate for a better opportunity, indicating a beneficial environment for multinational companies (MNCs) looking to hire.

 **68** | **Headcount predicted to grow or remain stable over the next year**
Percentage of respondents who predict headcount to increase or remain stable over the next year.

 **40** | **Sector results are split**
Percentage of respondents within the consumer goods sector who are expecting headcount to increase in the next year.


 **68** | **Majority of employees searching for new opportunities**
Percentage of respondents who plan look for a job in the next six months.


 **81** | **Employees are willing to relocate for a better career**
Percentage of respondents who would consider relocation for a better career opportunity.


While some sectors have been affected, there are still many opportunities for growth within the manufacturing and operations industry. The key findings of our survey, outlined below, help to identify these opportunities for employers and employees alike.

Talent Attraction & Retention

A large proportion of respondents value career progression and development when considering a new job. Those with strong sales abilities as well as those in R&D are most highly valued and sought-after by employers.




 **39** | **Career development is highly valued**
Percentage of all respondents who hold career progression as most important when job searching.

 **34** | **Individuals with strong sales skills are highly sought-after**
Percentage of all respondents who state that their current company faces its biggest recruitment and retention challenges in sales and marketing.

 **22** | **Increased focus on R&D**
Percentage of all respondents who say R&D is their company's biggest challenge for recruitment and retention among all job functions.




Business Confidence

Despite China's recent economic downturn, those within the manufacturing industry remain optimistic for their growth over the next year. Domestic and private companies have outweighed foreign MNCs and are now leading the charge.

-  **44** | **Optimism remains high in the manufacturing industry**
Percentage of all respondents who expect either moderate or strong growth in the manufacturing industry over the next year.
-  **45** | **Domestic, private companies have outweighed foreign MNCs and are now dominating growth**
Percentage of all respondents who agree that domestic and private companies are growing most rapidly.
-  **74** | **Economic trends and career changes**
Percentage of respondents who state that the economic climate has an impact on their decision to look for a new job.

Candidate Expectations

Along with overall optimism in the industry, many respondents received a sizable pay raise during the last year, and most respondents are expecting an even higher raise in the year following. Over one third of employees' companies do not have a formal graduate development program in place.

-  **37** | **Pay raises – the past year**
Percentage respondents who received a raise of 5-10 percent during the last year.
-  **50** | **Pay raises - expectation gap**
Percentage of respondents who are expecting a raise next year of over 10 percent.
-  **25** | **Percentage of respondents who actually received this raise last year.**
-  **41** | **Employee development**
Percentage of all respondents' companies who have a graduate development program.

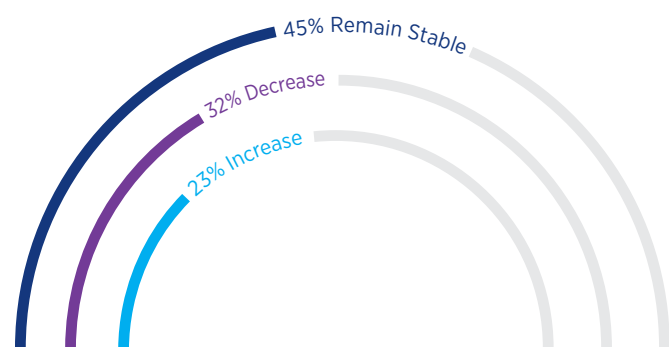
SURVEY RESULTS

JOB MARKET LANDSCAPE

Headcount predicted to grow or remain stable over the next year

68 percent of respondents predict headcount to increase or remain stable over the next year.

Over the next 12 months, how will permanent headcount change in your current company? (results overall)



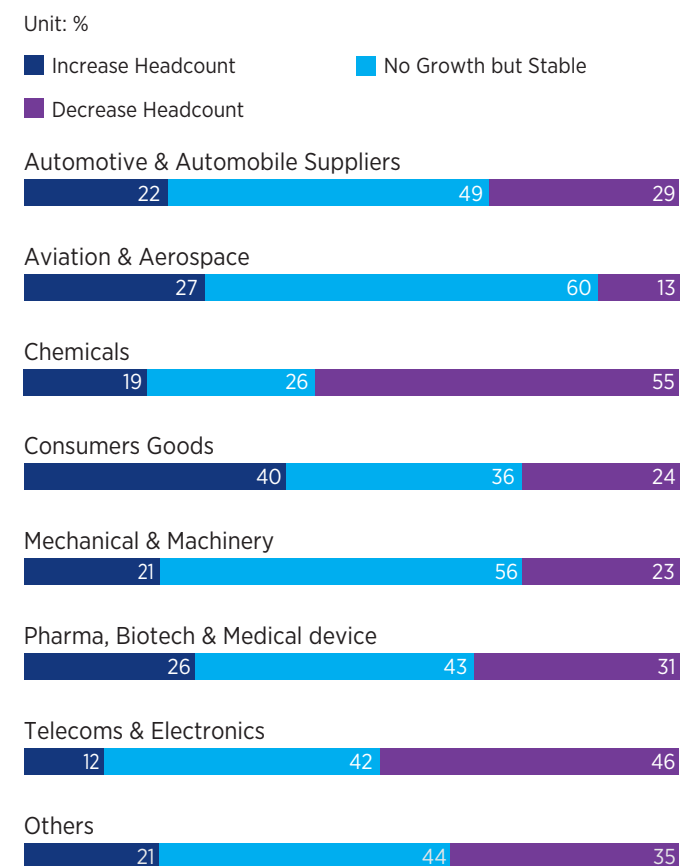
One key indicator of the overall job market landscape is estimated headcount growth in the near future. Headcount can portray a company's willingness and ability to expand, indicative of its more broadly measurable success in the market.

When asked how permanent headcount would change in their current company over the next 12 months, almost a quarter (23%) of all respondents foresee their company's headcount either increasing over the next year. Another 45 percent predict stability in this area. This is a positive sign for China's manufacturing industry. While growth has certainly decelerated, many companies are still finding success in niche sectors within the larger industry and are not experiencing a major contraction. Instead they are strategically redistributing their existing assets to promote growth. Less than a third (32%) of all respondents are predicting a decrease in headcount, a reassuring figure. The recent manufacturing slowdown may have had less of an impact overall on business than popularly thought.

Sector results are split

40 percent of respondents within the consumer goods sector are expecting headcount to increase in the next year.

Over the next 12 months, how will permanent headcount change in your current company?



Examining these results by sector, the consumer goods sector is the most optimistic for increased headcount in the next year with 40 percent of respondents within this industry expecting headcount to increase. On the opposite side of the spectrum, the chemical and telecoms and electronics sectors are experiencing the sharpest contraction of headcount moving into next year due in part to an oversupply and lowered demand in the sectors.

Majority of employees searching for new opportunities

68 percent of respondents are planning to change jobs in the next six months.

Are you currently looking for a job in the next six months? (results overall)

Unit: %



Despite the majority of manufacturers not planning to increase their headcount and instead focusing on stabilization, 68 percent of respondents express that they are planning to look for a new job over the next six months. This number, while quite high, can also indicate an opportunistic hiring environment for employers looking to expand their business and take on new employees.

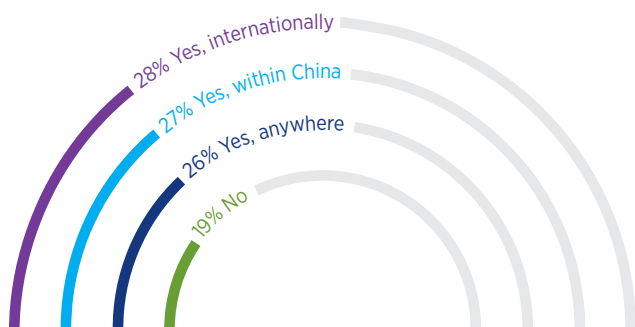
Those working in MNCs are most likely to pursue new job opportunities in the next six months with over 77 percent of all respondents in this category answering yes to this question. Employees working in State-Owned Enterprises (SOEs) are least likely with only 56 percent of respondents in this group answering yes.

Within sectors, those working in the telecoms and electronics sector are most likely to look for a new job (75 percent answered yes), while those in the aviation and aerospace industry most likely to remain in their current company (53 percent answered no).

Employees are willing to relocate for a better career

81 percent of respondents would consider relocation for a better career opportunity.

Would you consider relocation to pursue a better career opportunity?



The traditional family-centric concept in China may be changing as the job market develops as well: employees in the manufacturing and operations industry are increasingly willing to relocate for a better job. 81 percent of respondents would accept relocation for a better career opportunity, and 28 percent are even willing to relocate internationally for better job opportunities. Only 19 percent of respondents express their unwillingness to move for a better career opportunity.

Due to rising labour costs in China and the government's increasingly strict environmental considerations, manufacturers have begun to consider transferring to inland China and other Southeast Asian countries. These above findings are positive signs for manufacturers looking to source qualified talent in a new job market. This willingness among employees in China to move and take on manufacturing jobs elsewhere in China and even abroad may come to be a key supporting factor for the Chinese government's ambitious "One Belt - One Road" plan.

This "One Belt - One Road" initiative is a development strategy and framework that focuses on connectivity and cooperation among countries primarily in Eurasia, consisting of two main components: the land-based "Silk Road Economic Belt" (SREB) and the oceangoing "Maritime Silk Road" (MSR). The strategy underlines China's push to take a bigger role in global affairs as well as its need to export China's production capacity in areas of overproduction such as steel manufacturing. If implemented successfully, the "One Belt - One Road" plan will encourage Chinese workers to move abroad for manufacturing and operations jobs in Southeast Asia or Russia. Given how willing the survey's respondents are to relocate, this may be a chance for Chinese companies to attract and retain employees with opportunities to move inter-land China or abroad for employment.

SURVEY RESULTS

TALENT ATTRACTION & RETENTION

Career development is highly valued

39 percent of all respondents held career progression as most important when job searching.

The results of our survey show that among all respondents, career development is by far the most important factor influencing their decisions to seek new jobs. Respondents overall take a very positive outlook to their careers and overall improvement; the majority giving the strongest weight to career progression also signifies a strong focus on results.

What is the most important factor influencing your decision to seek a new job? (results overall)



When dividing respondents by years of experience, however, salary becomes a deciding factor for those with less experience: almost 40 percent of all respondents with less than five years of experience state that salary is the most important factor for them when considering a new job opportunity. Conversely, the more experience that respondents have, the less importance they place on salary as a deciding element affecting job choice: only eleven percent of respondents with more than 20 years of professional experience list salary as the most important factor influencing their job search.

As pay typically increases with years of experience, the survey also shows that focus shifted from salary to a healthy management and company culture. Only four percent of all respondents with less than five years of experience think management and culture is most

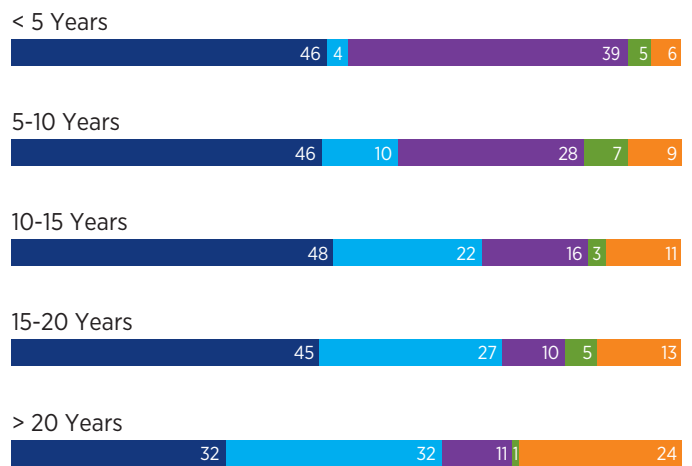
important for them, while 22 percent of those with 10-15 years of experience list this as the most important factor. Among those with more than 20 years of professional experience, management and culture rivals career progression as the most important factor influencing decisions to seek a new job.

This gradual shift in focus from remuneration to management culture as respondents' experience grows reflects their expected maturation as their career progresses, especially evident in the manufacturing and operation industry.

What is the most important factor influencing your decision to seek a new job?

Unit: %

■ Career Progression ■ Management & Culture ■ Salary
 ■ Training & Development ■ Work/Life Balance



Individuals with strong sales skills are highly sought-after

34 percent of all respondents state that their current company faces its biggest recruitment and retention challenges in sales and marketing.

Job seekers with strong business development skills and the ability to maintain existing and generate new business for their companies are always some of the most sought-after individuals in the job market. These business development skills are often applicable across multiple industries and have become especially hot as China's manufacturing growth has slowed in recent years.

Results from our survey also reflect this trend: almost 34 percent of all respondents state that their current company faces its biggest recruitment and retention challenges in these business development, or "sales and marketing" positions. Moreover, with exception to the pharma, biotech and medical device sector, every sector polled lists this area as their biggest challenge for retention.

Production and operations presents the biggest recruitment and retention difficulties for the pharma, biotech and medical device sector. This can in part be ascribed to the high level skill required for these positions specific to this sector, making these professionals more sought-after than their equivalents in other industries.

Which area in your current company faces the biggest recruitment and retention challenges? (results overall)



Increased focus on R&D

22 percent of all respondents say R&D was their company's biggest challenge for recruitment and retention.

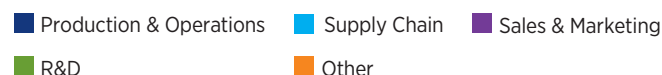
Apart from business development professionals, those involved in research and development (R&D) are

also some of the most sought-after talent in China's manufacturing and operations industry. Almost 22 percent of all respondents state R&D is their company's biggest challenge for both recruitment and retention. As manufacturers in China are pursuing new products and technology to help win them a competitive edge (both domestically and internationally), a high demand for professionals who can lead this type of transformative push comes as no surprise.

China's new "Made in China 2025" campaign has also driven this focus on and demand for R&D growth and expansion. This campaign, announced during China's March 2015 Lianghui, is the Middle Kingdom's newest ten-year action plan focusing on driving innovation, smart technologies, and green development within China's manufacturing industry. As the overall living standard increases in China, labour costs are also rising, creating further impetus for China to upgrade its manufacturing base with special focus on the above areas. The Chinese government will also provide preferential policies to promote a restructuring of the traditional manufacturing industry, and support enterprises' mergers and reorganizations as well as market competition.

Which area in your current company faces the biggest recruitment and retention challenges?

Unit: %



Automotive & Automobile Suppliers



Aviation & Aerospace



Chemicals



Consumers Goods



Mechanical & Machinery



Pharma, Biotech & Medical device



Telecoms & Electronics



Others



**44 PERCENT OF ALL
RESPONDENTS EXPECT
EITHER MODERATE OR
STRONG GROWTH IN THE
MANUFACTURING INDUSTRY
OVER THE NEXT YEAR.**



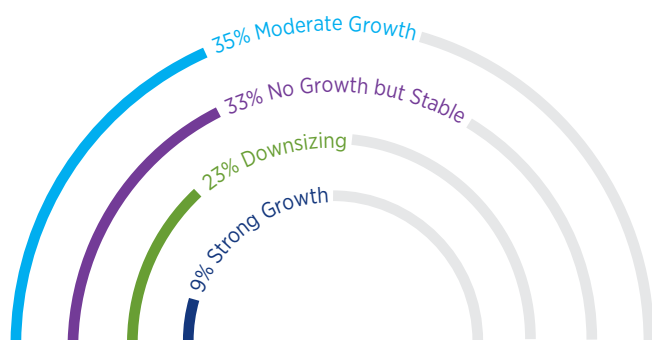
SURVEY RESULTS

BUSINESS CONFIDENCE

Optimism remains high in the manufacturing industry

44 percent of all respondents expect either moderate or strong growth over the next year.

What level of growth do you expect in your sector over the next 12 months? (overall results)



Despite the fact that the overall growth rate of China's manufacturing industry is beginning to slow, the fact remains that China still maintains global dominance in the industry. Other Southeast Asian countries are beginning to develop their manufacturing operations in an effort to replicate the success and internationalization seen in China. However, even emerging countries most on pace to further develop this industry are substantially behind China in terms of breadth of industry, developed infrastructure and international connectivity.

Often, the professionals working within certain industries can provide the best insight into the current state of business as well as an outlook for the future – our survey provides just that. The level of business confidence by those working in this manufacturing and operations industry in China reflects this sustained optimism. When asked, almost 44 percent of all respondents expect the manufacturing industry to see either moderate or strong growth over the next 12 months.

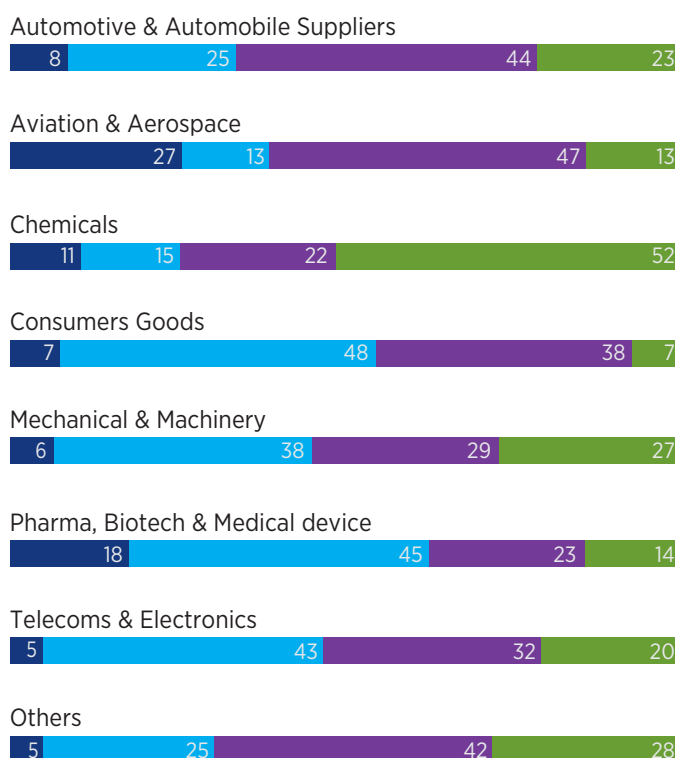
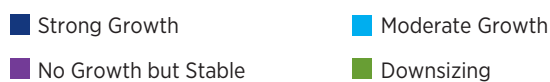
Looking more deeply into specific sectors, almost all sectors have very positive outlooks for the next year. All sectors except for the heavy sub-industries (i.e. automotive

and chemicals) have at least 40 percent of all respondents expecting moderate to strong growth for their sector looking ahead. The difficulties experienced by these heavy sub-industries can be attributed to the stress these industries in particular are experiencing more so than others for reasons discussed above.

Three sectors in particular are especially optimistic: over half of respondents from the consumer goods, pharma, biotech and medical device, and telecoms and electronics sectors are expecting either moderate to strong growth in the next year. The aviation and aerospace sector is expecting the highest growth with over 27 percent of all respondents predicting strong growth over the next year, the highest between all industries polled.

What level of growth do you expect in your sector over the next 12 months?

Unit: %

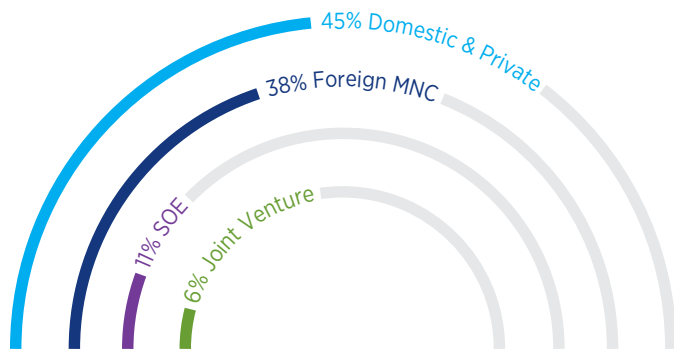


The majority of respondents also predict that their sector will stay stable over the next year: nearly half of respondents from the automotive and automobile suppliers and the aviation and aerospace sub-industries expect their sectors to remain stable. Meanwhile, respondents in sectors that cater to customers' daily needs (i.e. consumer products, pharmaceuticals, biotech and medical device, and telecoms and electronics) express hopes that their respective sectors will experience some moderate growth in the next year.

Domestic, private companies and foreign MNC dominate growth

83 percent of all respondents agree that either domestic and private companies or foreign multinational companies are growing most rapidly.

Which types of employers are growing most rapidly in your industry? (results overall)



As China's economy continues to internationalize and further integrate foreign investment, both foreign MNCs and private, domestic firms are seeing growth and success. The results of our survey provide further insight into the growth these firms are experiencing: 83 percent of all respondents state that either domestic, private companies or foreign MNCs were growing most rapidly in their industry.

Chinese companies have been gaining the most traction in recent years, however: almost half (45%) of all employers polled believe that domestic and private companies are growing most rapidly. Preferential policies from both the national and local governments have boosted the success seen from many domestic companies. While MNCs are still experiencing strong growth, the success and expansion for domestic companies in particular seems primed to continue in the near future.

China has also seen a recent transformation of State Owned Enterprises (SOEs) in terms of organizational structure, governance, finance, and human resources policies – 89 percent of respondents believe employers other than SOEs are growing most rapidly. If the SOE transformation initiative led by the government is successful, SOEs can be expected to enjoy significantly increased growth. These enterprises have already begun to see some such success through focused infrastructure-related investment projects.

Economic trends and career changes

Does the economic climate have an impact on your decision to look for a new job? (results overall)

Unit: %



Respondents overall saw a strong influence on the economy and their willingness to change their career: almost three-fourths of all respondents (74%) stated that the economic climate has an impact on their decision to look for a new job. Regardless of the state of the economy, however, this is to be expected. An economy strongly moving ahead can be just as likely to foster new career changes as a sluggish one – these figures are not indicative of the strength of an economy, but rather the strong relationship that professionals have with the overall state of the economy.

SURVEY RESULTS

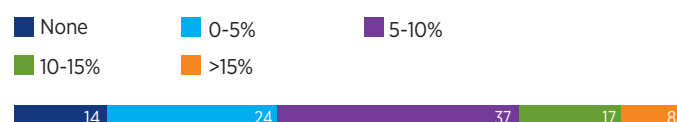
CANDIDATE EXPECTATIONS

Experience and raises – the past year

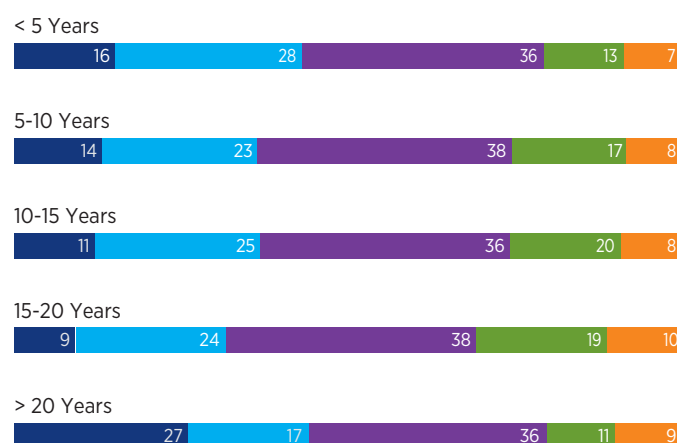
37 of respondents received a raise of 5-10 percent during the last year.

Pay raise received in the last 12 months (overall results)

Unit: %



Results by years of experience



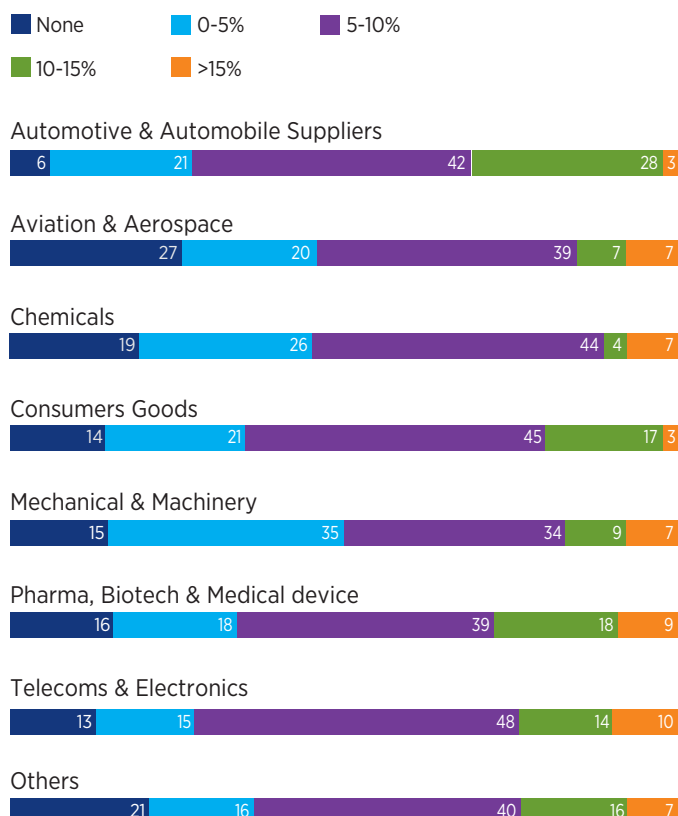
Employee salaries are another excellent way to judge the overall expansion and growth of a company or industry in general. In this regard, the majority of respondents have seen positive growth: 37 percent of all respondents had received a five to ten percent raise over the past year and 25 percent of all respondents polled had received a raise above ten percent.

Looking more deeply into these raises by years of experience, our survey indicates that professionals with more years of experience reported higher raises. Respondents with 10-20 years of experience were slightly more likely to receive higher raises than those with less than ten years' experience.

Examining results by sector, the majority of respondents in each sector also experienced a five to ten percent raise over the past year. The chemical sector in particular can be highlighted: 44 percent of respondents from this sector saw a raise of five to ten percent in their salaries in the past year, but only eleven percent saw a raise of anything over ten percent. This is a significant decline when compared to many of the other sectors, perhaps signifying this area being more affected by China's slowing growth than other industries.

Pay raise received in the last 12 months

Unit: %

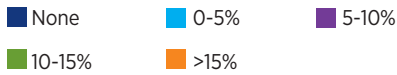


Industry and raises - expectations

Half of respondents are expecting a raise next year of over 10 percent, while only 25 percent actually received this raise last year.

Expected in the next 12 months

Unit: %



Results by industry sectors

Automotive & Automobile Suppliers



Aviation & Aerospace



Chemicals



Consumers Goods



Mechanical & Machinery



Pharma, Biotech & Medical device



Telecoms & Electronics



Others



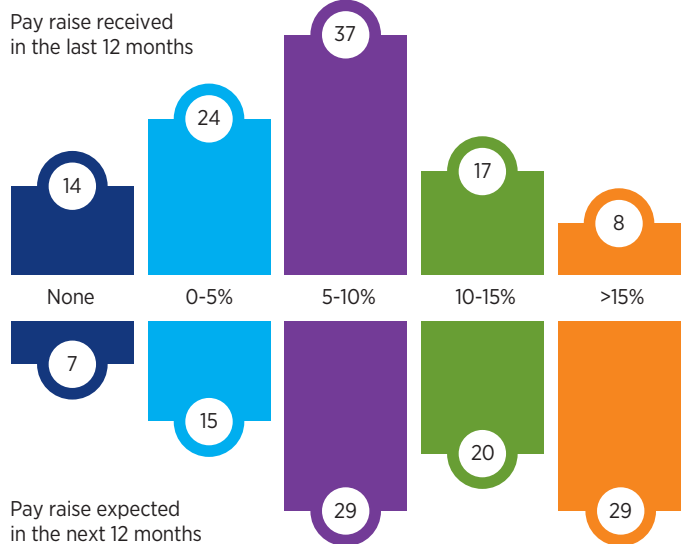
Despite the slowing growth of China's manufacturing industry, employees remain hopeful: by a slim margin, the majority of respondents (30%) actually expect over a 15 percent pay raise over the next 12 months. Following closely second, 28 percent of respondents expect a five to ten percent raise next year, more in line with the raise many saw this past year. However, this optimism for higher raises is a positive indicator of the industry in general.

The same optimism is also apparent when separating the above results by sector. All sectors with close exception to "Others" at 47 percent have at least 50 percent of all respondents expecting a 5-15 percent raise over the next year.

On the other hand, these statistics may also demonstrate respondents' somewhat unrealistic expectations for a raise in salary. Almost half of respondents (49%) expect a pay

raise of over 10 percent in the next year, while only half of that amount (25%) actually received this level of pay raise last year.

Comparison with actual pay raise received and the pay raise expected (overall)



Employee development

41 percent of all respondents' companies have a graduate development program.

Overall seven million fresh college graduates entered into China's workplace in June 2015, the highest number in the past 64 years in China. The presence of formal graduate development programs by employers can have a substantial impact on the graduate employment market. As the job market in China continues to become increasingly competitive, employers are turning to different and more substantive ways to not only attract talent, but also keep that talent engaged and reduce turnover. Graduate development programs are excellent for companies to achieve this. They show that companies are willing to invest in their employees for the short and long term end.

Respondents report dissimilar policies from their companies: 41 percent of respondents' companies did have a development program, while 36 percent did not. Examining results by city, our survey indicates that Beijing had the highest number of formal development programs in place by far (65%), followed by Shanghai and Suzhou both at 38 percent and 37 percent respectively.

SURVEY SUMMARY



Our survey shows that China's slowing growth is overall not having an adverse effect on many elements within the manufacturing and operations industry. More than two thirds of respondents are planning to look for a new job in the next six months and also willing to relocate across company sectors (e.g. from an MNC to a domestic and private company) and location for a better job opportunity. These findings indicate an opportunistic hiring environment for employers who are expanding their businesses especially as China's manufacturing industry is looking to increase its global influence under the "One Belt, One Road" policy.

When considering a new job, all respondents with different years of working experience prioritize career progression and development over factors such as salary, especially among those with fewer than 15 years of professional

experience. Companies offering more formal career development programs may attract higher quality and more sought-after employees such as those with strong sales abilities as well as those in R&D. This highlights the strong drive that many professionals continue to have.

Despite some slowed growth in manufacturing, many employees remain optimistic about the industry and indeed received a sizable pay raise during the last year; in fact, most are expecting an even higher raise in the year following. These highlights also differ across industries within the manufacturing industry: there are generally more opportunities for both employers and employees in customer-related or specialized sectors such as consumer goods, pharmaceuticals, biotech and medical devices than heavy sector such as mechanical and machinery due to oversupply in these last two sectors.

CHINA MANUFACTURING INDUSTRY EMPLOYMENT OUTLOOK REPORT

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