



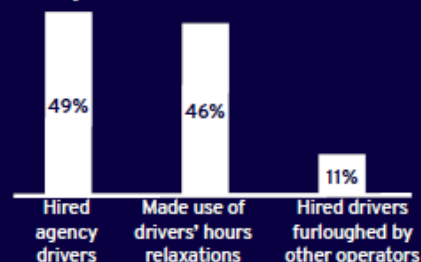
CLFQP - FTA update

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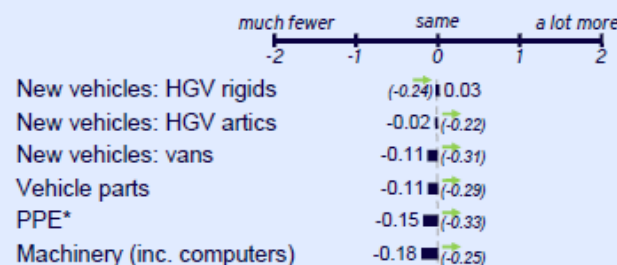
May 2020

FTA weekly Coronavirus Logistics Impact Survey

Measures taken to address short-term fluctuations in demand following furlough of HGV drivers:



Availability of supplies (compared to last week):



HGV drivers

14,896 staff
 14.2% furloughed
 0.2% made redundant
 3.6% self-isolating
 87.5% require PPE

Van drivers

8,229 staff
 5.1% furloughed
 0.0% made redundant
 4.9% self-isolating
 95.0% require PPE

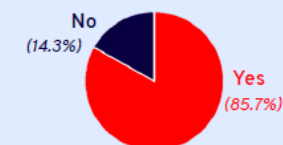
Warehouse staff (forklift drivers, pickers, packers, etc.)

25,528 staff
 4.2% furloughed
 0.0% made redundant
 2.4% self-isolating
 97.5% require PPE

All other road transport staff (support staff, managers, administrators, etc.)

38,348 staff
 5.6% furloughed
 0.0% made redundant
 0.9% self-isolating
 29.7% require PPE

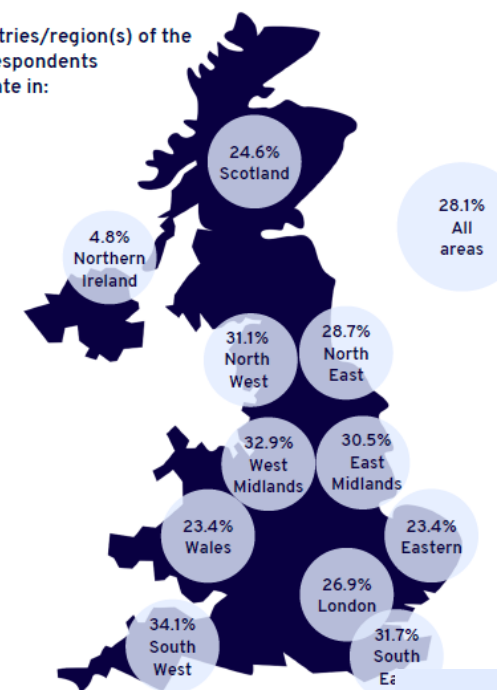
Respondents transporting freight by road:



Average percentage of fleet parked up (including SORN) due to the coronavirus pandemic:

14.0% HGVS
 10.1% vans

Countries/region(s) of the UK respondents operate in:



Non-road staff in general

8,735 staff
 30.4% furloughed
 1.1% made redundant
 2.1% self-isolating
 32.9% require PPE

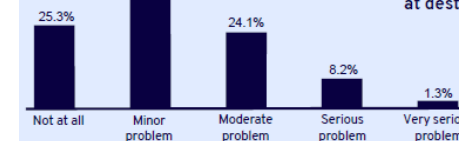
Level of supply chain disruption experienced, compared to last week:

	Normal performance	Minor disruption (drop ≤25%)	Moderate disruption (drop >25% but ≤50%)	Severe disruption (drop >50% but ≤75%)	Extreme disruption (drop of 75%+)
Overall freight volumes (tonnes)	12.8% ↑	21.5% ↓	27.3% ↑	14.5% ↓	23.8% ↑
Freight kilometres	18.2% ↓	25.2% ↑	25.2% ↑	10.1% ↓	21.4% ↓
No. of units in use	18.6% ↓	26.2% ↑	23.3% ↑	11.0% ↓	20.9% ↓
Storage/warehousing capacity	44.3% ↑	20.6% ↓	12.4% ↓	6.2% ↓	16.5% ↑
Orders for your business' services	12.4% ↓	25.3% ↑	19.9% ↑	15.1% ↓	27.4% ↑
Cash flow	16.8% ↓	23.7% ↑	19.5% ↑	16.8% ↑	23.2% ↓
Customers paying on time	27.4% ↑	24.7% ↓	22.6% ↑	12.6% ↓	12.6% ↓

Companies in danger of financial collapse in the next eight weeks:



Do drivers have issues accessing hygiene facilities due to coronavirus restrictions at destination sites?



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	Not eligible	Applied successfully	Applied unsuccessfully	Applied but still waiting	Do not intend to use	Need more information
Coronavirus Job Retention Scheme	8.7%	58.2%	1.0%	5.6%	19.9%	6.6%
Bounce Back Loan Scheme	14.6%	9.6%	0.0%	12.9%	46.6%	16.3%
Coronavirus Business Interruption Loan Scheme for SMEs	17.8%	5.6%	5.0%	4.4%	51.1%	16.1%
Coronavirus Business Interruption Loan Scheme for large businesses	29.9%	2.4%	0.6%	1.8%	52.4%	12.8%

Actions businesses are taking with staff:

Have already implemented		Will implement in coming weeks
77.9%	Scaled back or suspended operations	2.0%
76.2%	Furloughed staff	1.5%
68.0%	Cut back on training	5.5%
38.0%	Taken work back in-house	0.0%
33.0%	Brought staff back from furlough	3.6%
25.3%	Diversified the business	3.1%
20.2%	Compulsory paid holidays	7.4%
15.9%	Unpaid leave/holiday	3.3%
9.6%	Made redundancies	7.3%

What changes have the majority of organisations implemented?

>50 Implemented (or likely to be)

Index (change – compared to two weeks ago)

78.9 (+4.5) ↑	Scaled back or suspended operations
76.9 (+0.2) ↑	Furloughed staff
70.8 (+2.6) ↑	Cut back on training
38.0 (+0.7) ↑	Taken work back in-house
34.8 (+9.9) ↑	Brought staff back from furlough
26.8 (-9.8) ↓	Diversified the business
23.9 (-0.8) ↓	Compulsory paid holidays
17.6 (+0.3) ↑	Unpaid leave/holiday
15.5 (+3.7) ↑	Made redundancies

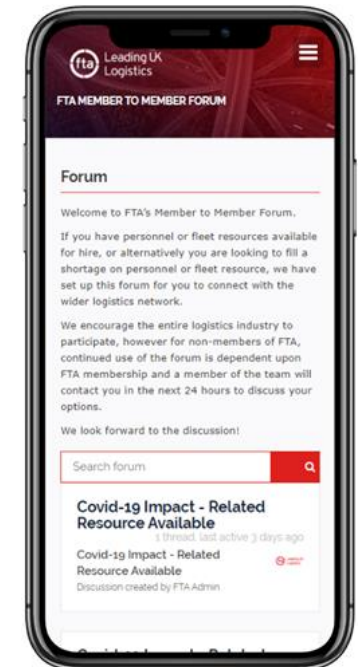
<50 Not yet implemented (or less likely to be)

Issues that will prevent business levels from returning to normal when coronavirus restrictions begin to lift:

	Not a barrier	Somewhat of a barrier	Moderate barrier	Extreme barrier
Social distancing	22.7%	32.0%	26.6%	18.7%
Cash flow	28.9%	22.7%	21.1%	27.3%
Customers no longer trading	14.5%	37.3%	19.7%	28.5%
Lack of work	17.4%	25.4%	21.4%	35.8%
MOT availability	24.3%	27.5%	26.5%	21.7%
Recruitment of drivers	58.4%	18.1%	19.3%	4.2%
Un-furloughing existing drivers	64.3%	17.2%	11.5%	7.0%
Relicensing vehicles for use	67.5%	17.9%	9.9%	4.6%
Lack of demand for business	15.6%	29.6%	22.1%	32.7%
Extended payment terms from suppliers/delayed payments	23.4%	28.3%	30.4%	17.9%

FTA campaigning and support

- Daily enews for members
- Sharing resources #logisticshelpslogistics
- Covid-19 Good Practice Guide for Logistics Operators
- DVS & LEZ delay
- LLCS
- Congestion charge changes
- Active travel and reallocation of road space
- Restart and recovery



Reallocation of road space to support active travel & social distancing

- Any temporary reallocation of road space for walking and cycling should be flexed and changed in a dynamic way to reflect changes in demand and to ensure access for vital logistics services.
- Kerbside access must be maintained at all times for deliveries and servicing.
- Roads are only closed where it would not cause an unduly large diversion and consideration must be given to the impacts of displaced traffic on nearby roads.
- Local businesses must be consulted, even though their shop-fronts may be closed, so they can make sure proposals meet their needs when they re-open.
- Enforcement against delivery vehicles must be proportionate and focussed on vehicles which are causing an obstruction to traffic flow or danger to road safety.
- Restrictions on delivery hours should be reviewed to enable, where possible, deliveries to take place at times when the roads are quieter, including earlier in the morning, later in the evening, overnight and at weekends.



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