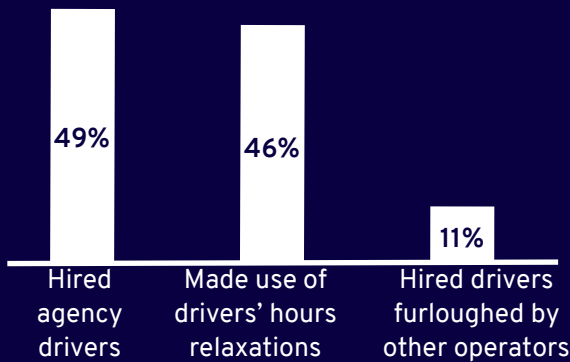


Coronavirus Logistics Impact Survey: 18 May 2020

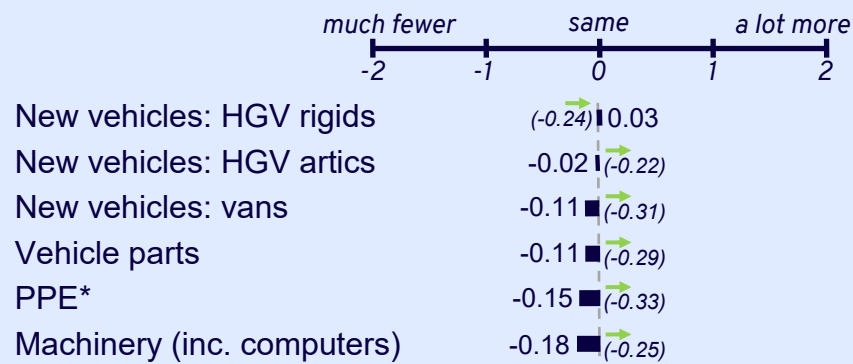
FTA's weekly Coronavirus Logistics Impact Survey focuses on identifying how operators and purchasers of logistics transport services are dealing with the coronavirus pandemic.

This ninth survey, conducted between 12 and 14 May 2020, had around **300** respondents spanning over **18** sectors in the UK – **46%** were small businesses with less than 50 employees, while **over one-quarter** were large businesses with more than 250 staff. Around **two-thirds** were operators of logistics transport services, with **one-third** consisting of both operators and users of logistics transport services.

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



Availability of supplies (compared to last week):



*PPE = Personal Protective Equipment

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:

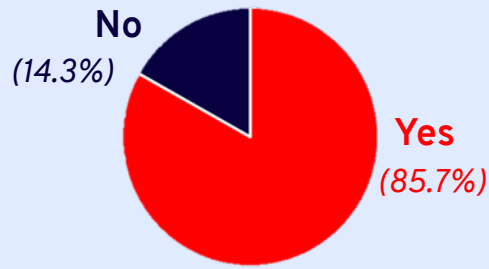


HGV drivers

14,896 staff

- 14.2% furloughed
- 0.2% made redundant
- 3.6% self-isolating
- 37.5% require PPE

Respondents transporting freight by road:



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

14.0%
HGVS

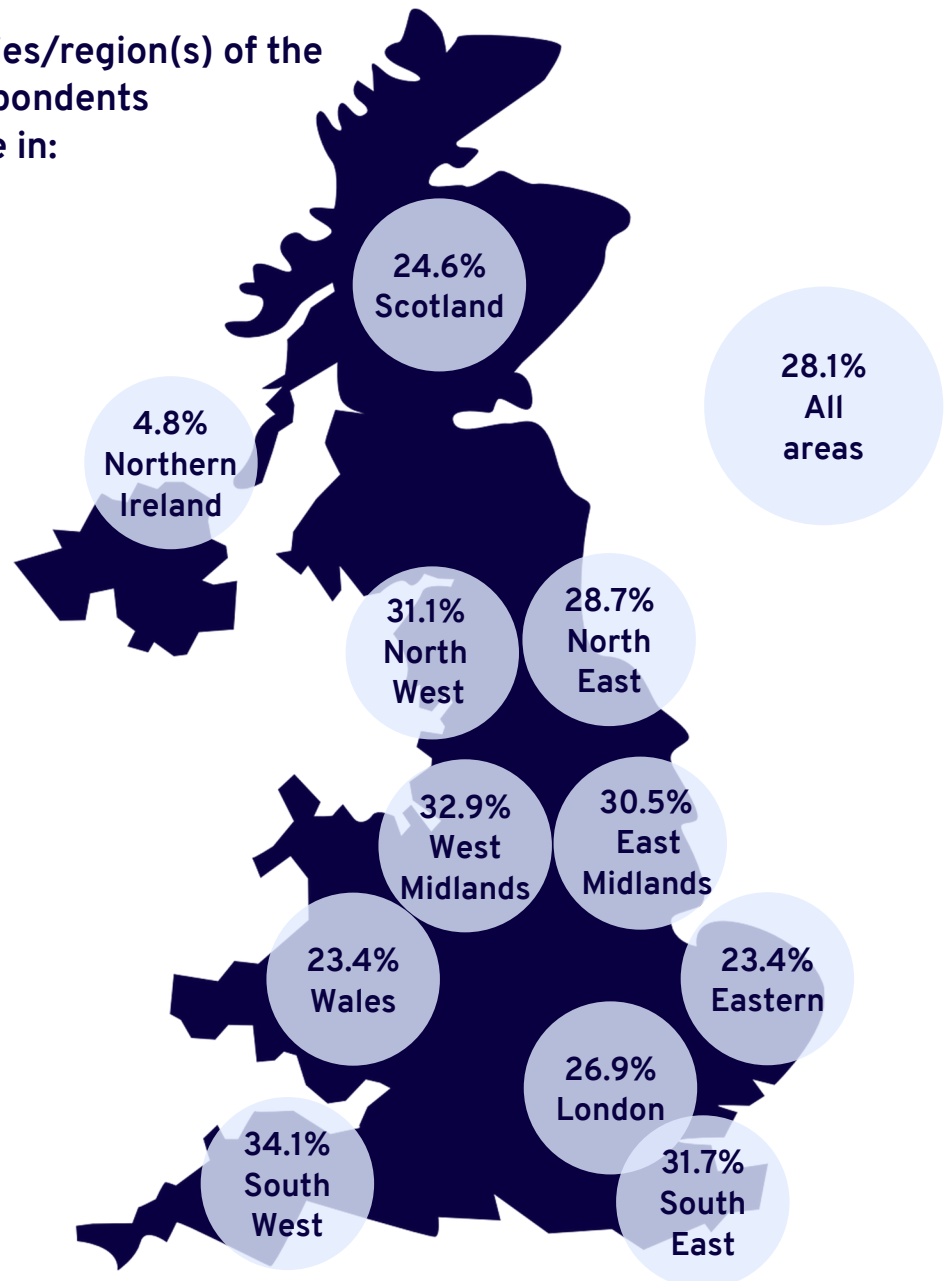
10.1%
vans

Van drivers

8,229 staff

- 5.1% furloughed
- 0.0% made redundant
- 4.9% self-isolating
- 35.0% require PPE

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



Warehouse staff

(forklift drivers, pickers, packers, etc.)

25,528 staff

- 4.2% furloughed
- 0.0% made redundant
- 2.4% self-isolating
- 75.2% require PPE

All other road transport staff

(support staff, managers, administrators, etc.)

38,348 staff

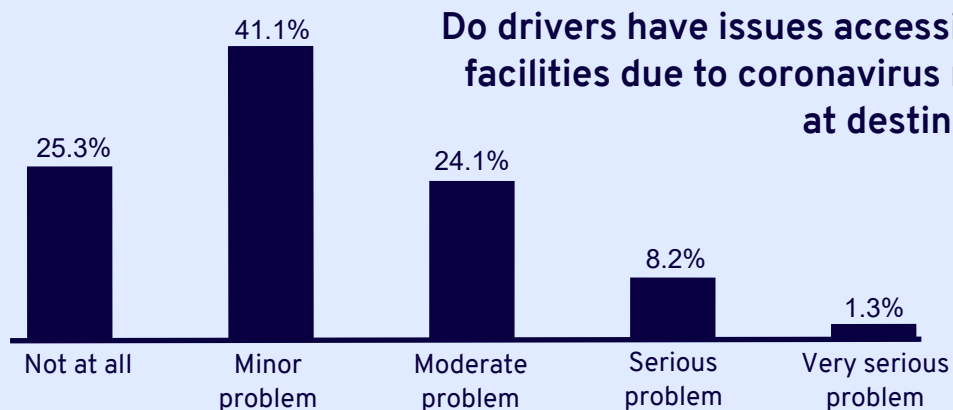
- 5.6% furloughed
- 0.0% made redundant
- 0.9% self-isolating
- 29.7% require PPE

Non-road staff in general

8,735 staff

- 30.4% furloughed
- 1.1% made redundant
- 2.1% self-isolating
- 32.9% require PPE

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



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)

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%

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%

Have respondents accessed the following schemes?

	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%

These results were collected between 12 and 14 May 2020 from answers provided by logistics businesses in our weekly Coronavirus Logistics Impact Survey – to take part, or for more information, please visit:

www.fta.co.uk/coronavirus/survey