



Logistical Services - UK - 2021

Report Price: £1495 | \$1995 | €1800

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This report looks at the following areas:

- The impact of COVID-19 on the logistical services market.
- Market sizing, segmentation and forecasts of the logistical services market.
- Analysis of trends and drivers of logistical services activity in the road, port, air and rail freight markets.
- Analysis of the industry structure and leading companies in the market.

In 2021, the UK logistical services market has faced a severe shortage of HGV drivers. In June 2021, the Road Haulage Association stated that a mix of factors, including Brexit and COVID-19, had led to an estimated shortage of 100,000 drivers.

In particular, the pandemic has impacted the number of EU and non-EU migrants in the UK and, for the road freight sector, this has meant a 14,000 decline in the number of HGV drivers from the EU. Additionally, the disruption caused by the pandemic saw drivers leave the sector to work elsewhere. This has occurred at the same time as other supply issues – capacity is still being held back by COVID-19 and, more importantly, a shortage of containers globally has meant that a lack of drivers is amplifying delays further since available containers are being trafficked slower.

With the backdrop of rising global demand for logistical services as economies reopen, alongside a shortage of gas in Europe, logistical services have increased drastically in price – particularly for road, port and air freight which are suffering capacity issues.

The unprecedented high shipping costs are especially affecting SMEs, who are being hit by administrative costs by the new post-Brexit trade regime. With unprecedented high costs for shipping, businesses have had to reconfigure their supply chains.



"The lifting of lockdown restrictions has helped restore activity in the logistical services sector. However, the rapid rise in demand from reopening has outstripped the sector's supply, as COVID-driven issues create an international shortage of shipping containers as well as a shortage of HGV drivers."

– **Francesco Salau, B2B Analyst**

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Some, such as freight forwarders, have found themselves pinched on both sides.

However, in some areas and for some goods (particularly food and ecommerce), there has been some reprieve found in rail freight – which offers lower prices and better sustainability.

With the recent announcement of the government's 'Plan for Rail', MBD expects demand for rail freight to become an increasingly important contributor to the UK logistical services market.



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Table of Contents

OVERVIEW

- **Key issues covered in this report**
- **COVID-19: Market context**
- **Economic and other assumptions**
- **Products covered in this Report**

EXECUTIVE SUMMARY

- **Impact of COVID-19 on logistical services**

Figure 1: Short, medium and long-term impact of COVID-19 on logistical services, 2020-25

- **The market**
- **Market size and forecast**

Figure 2: Market size and forecast for the logistical services market, 2017-26 (€ billion)

- **Market segmentation**

Figure 3: UK logistical services market value, by segment, 2017-21 (€ billion)

- **Road freight**

Figure 4: Annual road freight transport in the UK, 2015-20 (billion tonne kms, million tonnes, and million kms)

Figure 5: Annual international road freight transport by UK-registered vehicles, 2015-20 (million tonnes lifted and billion tonne km moved)

- **Port freight**

Figure 6: UK port freight traffic, by major and minor ports, 2015-20 (thousand tonnes)

- **Rail freight**

Figure 7: Mass of freight goods carried on the rail network, by type of good, 2015/16-2020/21 (million tonnes)

- **Air freight**

Figure 8: UK air freight, by aircraft configuration, 2015-20 (tonnes)

ISSUES AND INSIGHTS

- **Rail freight to benefit from tumultuous year for supply chains**
- **Digital technology will be instrumental to successful competition in the logistical services market**

MARKET SIZE

- **The impact of COVID-19 on logistical services**

Figure 9: Short, medium and long-term impact of COVID-19 on logistical services, 2020-25

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- **Brexit and COVID-19 are driving supply chain disruption**

Figure 10: EU and non-EU import and export of goods, excluding precious metals, August 2018 - August 2021 (£ billion)

Figure 11: UK logistical services market value, 2017-21 (£ billion)

MARKET SEGMENTATION

- **Disruption to road and port freight is pushing activity to air and rail**

Figure 12: UK logistical services market value, by segment, 2017-21 (£ billion)

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

MARKET FORECAST

- **Logistical services market to rise 11% by 2026**

Figure 13: UK logistical services market forecast, 2022-26 (£ billion)

Figure 14: UK logistical services market forecast, by segment, 2022-26 (£ billion)

ROAD FREIGHT

- **Driver shortages are a key factor in UK supply chain issues**
- **Industry reaction to HGV driver shortage**
- **Government response**
- **Cabotage changes**
- **Private sector response**
- **Domestic road freight activity**

Figure 15: Annual road freight transport in the UK, 2015-20

Figure 16: Annual goods lifted in the UK by UK-registered HGVs, by commodity group, 2016-20 (million tonnes)

- **International road freight activity**

Figure 17: Annual international consignments from and to the UK, 2015-20 (thousands of consignments)

Figure 18: Annual international road freight transport by UK-registered vehicles, 2015-20 (million tonnes lifted and billion tonne km moved)

Figure 19: Annual goods lifted outward from and inward to the UK by UK-registered HGVs, by commodity group, 2015-20 (thousand tonnes)

Figure 20: Annual goods moved outward from and inward to the UK by UK-registered HGVs, by commodity group, 2015-20 (million tonne km)

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Figure 21: International goods lifted to the UK by foreign-registered HGV, 2018 and 2019 (thousands tonnes unloaded in UK)

Figure 22: International goods lifted from the UK by foreign-registered HGV, 2018 and 2019 (thousands tonnes unloaded in UK)

PORT FREIGHT

- Container shortage is having a knock-on effect on warehouse availability**
- Structural issues amplified by COVID-19 are driving delays**
- Rising shipping costs**
- Rising storage cost and road haulage shortage put the squeeze on port forwarders**

Figure 23: Drewry World Container Index, July 2019–December 2021 (cost per 40-foot container, \$)

- Port freight activity**

Figure 24: UK port freight traffic, by major and minor ports, 2015–20 (thousand tonnes)

Figure 25: International and domestic major and minor port freight traffic, by traffic direction, 2015–20 (million tonnes)

Figure 26: UK major port traffic, by cargo type, 2015–20 (thousand tonnes)

Figure 27: Major UK ports, top 10, by total tonnage, 2019 and 2020 (thousand tonnes and % of total UK tonnage)

Figure 28: UK major port international freight traffic, by route, loading or unloading, 2020 (thousand tonnes)

Figure 29: Number of ship arrivals at UK ports, by type, 2019 and 2020 (number of vessels)

Figure 30: UK interests in trading ships of 100 gross tons and over, by type of interest, 2015–20 (number of vessels and million deadweight tonnes)

Figure 31: UK-owned vessels of 100 gross tons and over, by type, at 31 December 2019 and 2020 (number of vessels and deadweight tonnage in thousands)

RAIL FREIGHT

- Rail freight is moving from stopgap to key strategy following HGV driver shortages**
- Rail freight will play an instrumental role in reducing carbon emissions**
- Future of the UK rail network**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

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Figure 32: Coal moved on the rail network, Great Britain, 2010/11-2020/21 (million tonnes)

- **Williams-Shapps 'Plan for Rail' and Great British Railways**

- **Rail freight activity**

Figure 33: GB freight train movements (including infrastructure trains) on the rail network, 2015/16-2020/21 (number of freight trains run)

Figure 34: Mass of freight goods carried on the rail network, by type of good, 2015/16-2020/21 (million tonnes)

Figure 35: Freight moved on the rail network, by good type, Great Britain, 2015/16-2020/21 (billion net tonne km)

AIR FREIGHT

- **Lack of passenger flights has driven demand for cargo aircraft**

Figure 36: Index of passenger numbers and cargo trafficked at Heathrow Airport, January 2019-September 2021 (index, Jan 2019 = 100)

- **Air freight costs**

- **Air freight activity**

Figure 37: UK air freight, by aircraft configuration, 2015-20 (tonnes)

Figure 38: UK air freight, by aircraft configuration and area, 2015-20 (tonnes)

INDUSTRY STRUCTURE

- **The structure of the logistical services sector**
- **Analysis of industry structure**
- **Change in industry structure**

Figure 39: Analysis of changes in the industry structure of the logistical services industry, by selected segments, 2016-20 (number of businesses and outlets)

- **Changes in employment structure**

Figure 40: Analysis of changes in the employment structure of the logistical services industry, by selected segments, 2019 and 2020 (number of outlets and % share of outlets)

- **Changes in financial structure**

Figure 41: Analysis of changes in the turnover structure of the logistical services industry, by selected segments, 2019 and 2020 (number of businesses and % share of businesses)

COMPANY PROFILES

- **CEVA Logistics**
- **Recent company activity**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

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- **Financial information**

Figure 42: Analysis of CEVA Logistics Ltd financial accounts, 2016-20 (€ million and %)

- **DHL Supply Chain**

- **Recent company activity**

- **Financial information**

Figure 43: Analysis of DHL Supply Chain Ltd financial accounts, 2016-20 (€ million and %)

- **Eddie Stobart**

- **Recent company activity**

- **Financial information**

Figure 44: Analysis of Eddie Stobart Ltd financial accounts, 2016-20 (€ million and %)

- **HOYER Petrolog**

- **Recent company activity**

- **Financial information**

Figure 45: Analysis of HOYER Petrolog UK Ltd financial accounts, 2015-19 (€ million and %)

- **Kuehne + Nagel**

- **Recent company activity**

- **Financial information**

Figure 46: Analysis of Kuehne + Nagel Ltd financial accounts, 2016-20 (€ million and %)

- **Wincanton Holdings**

- **Recent company activity**

- **Financial information**

Figure 47: Analysis of Wincanton Holdings Ltd financial accounts, 2017-21 (€ million and %)

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- **Abbreviations**

FURTHER SOURCES AND CONTACTS

- **Trade associations**

- **Trade magazines**

- **Trade events**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

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