

Logistical Services - UK - 2021

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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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