



Logistical Services - UK - 2022

Report Price: £1495 | \$1995 | €1800

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

This report looks at the following areas:

- 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.

Over 2021, ecommerce sales experienced significant growth and reached £111.1 billion in value. In addition, the reopening of the British economy witnessed a surge of freight activity and growth worth up to £3.6 billion which was a by-product of a re-optimised supply chain designed to tackle e-fulfilment demand as well as the transportation of vital commodities needed for the resumption of work on infrastructure projects.



“2022 has been a challenging year for both freight forwarders and handlers alike, the continuation of issues which affected productivity in 2021 are still relevant such as the HGV driver shortage and the economic turbulence certain sectors have faced.”

- Jack Maskell, B2B Analyst

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

OVERVIEW

- **Key issues covered in this Report**
- **Products covered in this Report**

EXECUTIVE SUMMARY

- **Five-year outlook for logistical services**

Figure 1: Five-year outlook for logistical services, 2022-27

- **The market**

- **Market size**

Figure 2: Market size for the logistical services market, 2018-22 (€ billion)

- **Market Forecast**

Figure 3: Market size and forecast of UK logistical services, 2017-27 (€ billion)

- **Market segmentation**

Figure 4: UK logistical services market value, by segment, 2018-22 (€ billion)

- **Road freight**

- **Marine freight**

- **Rail freight**

Figure 5: GB freight train movements (including infrastructure trains) on the rail network, 2017/18-2021/22 (number of freight trains run)

- **Air freight**

Figure 6: UK air freight, by aircraft configuration, 2016-21 (000 tonnes)

ISSUES AND INSIGHTS

- **Creation of a 'National Freight Network' is necessary for a unified cross-modal freight response**
- **The emergence of a 'smart freight' network will be central to cross-modal co-operation**
- **Rising lithium carbonate costs and the absence of a UK gigafactory could provide the respite required for electric vehicle infrastructure to catch up**

MARKET SIZE

- **Full reopening of the economy drives the market forward in 2022**
- **2022 becomes a 'rebalancing' year for freight output as forwarders struggle to combat rising operational costs due to inflation**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- The increased decarbonisation of freight provides some insulation from inflated operational costs**

Figure 7: UK logistical services market value, 2018-22 (€ billion)

MARKET SEGMENTATION

Figure 8: UK logistical services market value, by segment, 2018-22 (€ billion)

MARKET FORECAST

- Five-year outlook for logistical services**

Figure 9: The five-year outlook for logistical services, 2022-27

- Logistical services market to rise by 14% to 2027 despite the imminent recession**

Figure 10: Market size and forecast of UK logistical services, 2017-27 (€ billion)

- A decarbonised freight network will become an increasingly vital driver of growth**
- Declining availability of warehousing space available could dampen freight activity growth**
- From Williams-Shapps plan for rail to Trudy Harrison's "Future of Freight" plan and UK rail freight**

ROAD FREIGHT

Figure 12: Comparison of miles per charge of largest EV HGV models, by brand, as of December 2022 (in miles)

Figure 13: Number of EV charge points v number of BEVs, 2018-22 (number of charge points and BEVs)

Figure 14: Regional EV LGV numbers v servicing infrastructure, in East England and the Midlands, 2019-21 (number of EV LGVs and charge points)

- The shortage of HGV drivers has stunted road freight development**
- The ageing of the UK HGV driver workforce will cause ongoing issues without changes being made**

Figure 15: Annual international consignments to and from the UK, 2016-21 (thousands of consignments)

Figure 16: Annual international road freight transport, by UK-registered vehicles, 2016-21 (million tonnes lifted and billion tonne km moved)

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

MARINE FREIGHT

- Lockdown spending and Brexit contingency planning led to port congestion in 2021**
- A rise in on-shoring has added to congestion problems**
- The threat of industrial action adds a new challenge to port freight operations**
- Global inflation and slowing consumer spend lead to a depreciation in global container shipping costs**

Figure 17: Drewry World Container Index, November 2020-November 2022 (cost per 40-foot container in \$)

- Port freight activity**

Figure 18: UK port freight traffic, by major and minor ports, 2016-21 (thousand tonnes)

Figure 19: International and domestic major and minor port freight traffic, by traffic direction, 2015-21 (million tonnes)

Figure 20: UK major port traffic, by cargo type, 2015-21 (thousand tonnes)

Figure 21: Major UK ports, top 10, by total tonnage, 2019-21 (thousand tonnes and % of total UK tonnage)

Figure 22: Number of ship arrivals at UK ports, by type of vessel, 2019-21 (number of vessels)

Figure 23: UK interests in trading ships of 100 gross tons and over, by type of interest, 2016-21 (number of vessels and million deadweight tonnes)

Figure 24: UK-owned vessels of 100 gross tons and over, by type, at 31 December 2020 and 2021 (number of vessels and deadweight tonnage in thousands)

RAIL FREIGHT

- Rail freight makes gains from disruption to road freight as HGV crisis worsens**
- The rise of 'last-mile' rail freight deliveries offers growth potential**
- Concerns remain for future productivity as ageing locomotive fleet remains in use**

Figure 25: Freight locomotives in UK, by rail freight company, 2017/18-2021/22 (number of locomotives)

- The decarbonisation of the UK rail freight network stalls as the energy crisis worsens**

Figure 26: Coal moved on the rail network, Great Britain, 2010/11-2021/22 (million tonnes)

- Rail freight activity**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Figure 27: GB freight train movements (including infrastructure trains) on the rail network, 2017/18-2021/22 (number of freight trains run)

Figure 28: Mass of freight goods carried on the rail network, by type of good, 2016/17-2021/22 (million tonnes)

Figure 29: Freight moved on the rail network, by good type, Great Britain, 2016/17-2021/22 (billion net tonne km)

AIR FREIGHT

- Integrated infrastructural platform and the improved affordability of fuel provide conditions for sector take-off**
- Jet fuel prices have helped ease previous affordability concerns...**
- ...although the ongoing conflict in Ukraine has dampedened this advantage as prices start to rise**

Figure 30: Index of passenger numbers and cargo trafficked at Heathrow Airport, September 2020-September 2022 (index, Sep 2020= 100)

- Air freight activity**

Figure 31: UK air freight, by aircraft configuration, 2016-21 (tonnes)

INDUSTRY STRUCTURE

- Analysis of industry structure**
- Changes in industry structure**

Figure 32: Analysis of changes in the industry structure of the road freight sector, 2017-22 (number of businesses and outlets)

Figure 33: Analysis of changes in industry structure of the sea and coastal freight sector, 2017-22 (number of businesses and outlets)

Figure 34: Analysis of changes in industry structure of the rail freight sector, 2017-22 (number of businesses and outlets)

Figure 35: Analysis of changes in industry structure of the air freight sector, 2016-22 (number of businesses and outlets)

Figure 36: Analysis of industry changes of the warehousing and storage sector, 2017-22 (number of businesses and outlets)

Figure 37: Analysis of industry changes of the cargo handling sector, 2017-22 (number of businesses and outlets)

- Changes in employment structure**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Figure 38: Analysis of changes in the employment structure of the road freight sector, 2021 and 2022 (number of outlets and % share of outlets)

Figure 39: Analysis of changes in the employment structure of the sea and coastal freight sector, 2021 and 2022 (number of outlets and % share of outlets)

Figure 40: Analysis of changes in the employment structure of the rail freight sector, 2021 and 2022 (number of outlets and % share of outlets)

Figure 41: Analysis of changes in the employment structure of the air freight sector, 2021 and 2022 (number of outlets and % share of outlets)

Figure 42: Analysis of changes in the employment structure of the warehousing and storage sector, 2021 and 2022 (number of Outlets and % share of outlets)

Source: MBD analysis of ONS data

- **Changes in financial structure**

Figure 44: Analysis of changes in turnover structure of the road freight transportation sector, 2021 and 2022 (£000 and number of companies)

Figure 45: Analysis of changes in turnover structure of the sea and coastal freight transportation sector, 2021 and 2022 (£000 and number of companies)

Figure 46: Analysis of changes in turnover structure of the rail freight transport sector, 2021 and 2022 (£000 and number of companies)

Figure 47: Analysis of changes in turnover structure of the air freight transportation sector, 2021 and 2022 (£000 and number of companies)

Figure 48: Analysis of changes in turnover structure of the warehousing and storage sector, 2021 and 2022 (£000 and number of companies)

Figure 49: Analysis of changes in turnover structure of the cargo handling sector, 2021 and 2022 (£000 and number of companies)

COMPANY PROFILES

- **CEVA Logistics**
- **Recent company activity**
- **Financial information**

Figure 50: Analysis of CEVA Logistics Ltd financial accounts, 2017-21 (£ million and %)

- **DHL Supply Chain**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Recent company activity**

- **Financial information**

Figure 51: Analysis of DHL Supply Chain Ltd financial accounts, 2017-21 (€ million and %)

- **HOYER Petrolog**

- **Recent company activity**

- **Financial information**

Figure 52: Analysis of HOYER Petrolog financial accounts, 2016-20 (€ million and %)

- **Kuehne + Nagel**

- **Recent company activity**

- **Financial information**

Figure 53: Analysis of Kuehne + Nagel Ltd financial accounts, 2017-21 (€ million and %)

- **Wincanton Holdings**

- **Recent company activity**

- **Financial information**

Figure 54: Analysis of Wincanton Holdings Ltd financial accounts, 2018-22 (€ million and %)

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- **Abbreviations**
- **Methodology**

APPENDIX – FORECAST METHODOLOGY

- **Market forecast and prediction intervals**

Figure 55: The UK market for logistical services, 2022-27 (€ billion)

- **Market drivers and assumptions**

- **Forecast methodology**

FURTHER SOURCES AND CONTACTS

- **Trade associations**
- **British International Freight Association (BIFA)**
- **European Logistics Association (ELA)**
- **Logistics UK (formerly FTA)**
- **Road Haulage Association (RHA)**
- **Society of Motor Manufacturers and Traders (SMMT)**
- **The Chartered Institute of Logistics and Transport (CILT)**
- **United Kingdom Warehousing Association (UKWA)**
- **Trade magazines**
- **Cold Chain News**
- **Freight Industry Times**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Motor Transport**
- **Transport Monthly**
- **Transport News**
- **Trade events**
- **Commercial Vehicle Show 2022**



What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster.

Our purpose is to help businesses and people grow. To find out how we do that, visit mintel.com.