

# Barometer of urban logistics in lockdown #2

April 3 - 10, 2020

Chaire  
LOGISTICS  
CITY

VILLE DE  
PARIS



Photo credit L. Dablanc

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- The **Logistics City** chair (<https://www.lvmt.fr/en/chaire/logistics-city/>) of the University Gustave Eiffel has launched, with the support of the City of Paris, an initiative to increase knowledge and awareness of the situation of the urban logistics sector in times of lockdown
- A panel of companies and platforms operating in Paris and the Île-de-France region was selected to be interviewed daily through a short and anonymous survey
- A second survey, conducted on a weekly basis, polls professional transport organisations
- This note summarises the results of the second week of surveys (daily survey among companies and platforms April 3 - 9, 2020, weekly poll among organisations April 10, 2020)

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## Overview and background information

A number of lessons can be drawn from these seven days of polling, from April 3 to 10, 2020

- On the **levels of delivery/collection activity** in Paris and the Ile-de-France region, there are of course still very clear differences between companies. There has been a certain "stabilisation in declines" compared to the pre-lockdown situation, but for some companies a strong recovery. On the restaurant deliveries side, the hope of a net increase in **home deliveries** has not yet been confirmed.
- The problems of **empty returns** (linked to the more general disorganisations of supply chains and the important variability of orders seen the previous week) are deplored.
- The supply of **sanitary equipment** remains a concern, particularly masks, despite an improvement compared to last week (especially on sanitary gels); the rise in **prices** and the **variability** of mask supplies from day to day remain disruptive. Overall "an insufficiently responsive market place in the Île-de-France region"; **pooled purchasing initiatives** are noted.
- **Recruitment problems have improved** compared to the previous week but persist, especially for digital platforms (gig workers) and large transport groups (employees, temporary workers) with concerns about **absenteeism**. Reductions in the number of collection points and frequent changes in post offices that remain open are increasing the number of delivery points and therefore the time to deliver. The need for **psychological support** for staff appears to be greater.
- **Traffic conditions** remain, of course, good, but the reporting of **fines** considered abusive continues. Problems of **access to restaurants and eating places** for home delivery couriers are noted.
- There are still many initiatives and participation in several solidarity operations, with an expressed desire for these initiatives to be **better recognised and more visible**.

(...)

## Some elements about the French and international context:

- The increase in food and non-food home deliveries due to the lockdown is **higher in the United Kingdom, Germany and the United States** (California, New York) **than in France** (Fox Intelligence; FreightWaves).
- Average **decrease in road freight transport prices** of 5% in Europe (Transporeon).
- 30% of **transport employees** (all sectors) in France are currently not working (sickness, care of children, fear of health hazard) (CFDT).
- 76% of the **B2C sites** listed by French e-commerce organization FEVAD recorded a drop in activity, 8% of the store chains stopped their online sales activities (FEVAD).
- With the improvement of Paris traffic, some clients are asking their service providers for **more tours** per day (OTRE).
- While wholesale pharmacy dispatchers on the contrary reduced daily rounds from 2 to 1 (Minute Pharma) – at the same time, pharmacy home delivery increased by 300%.
- The **average speed** on New York City's I-495 (Queens) increased from 26 to 61 km/h (ATRI).
- The **acquisition of light commercial vehicles** by companies in France fell by 63% in March 2020 (Arval Mob. Obs.).
- **Collaborative home delivery** platforms such as Yper settle in the delivery landscape in France (Les Echos).
- The draft decree from 2019 Law on Mobility implementing the **low-emission zones** (art 86) on the concept of "road transport's preponderant share of emissions" is subject to public consultation until 13 April.

In a residential street in Beijing, early April 2020: boom in home deliveries but **ban on delivery people entering residences**

Source: Arte, Chine, le monde d'après





# Change in delivery volumes in the Ile-de-France region

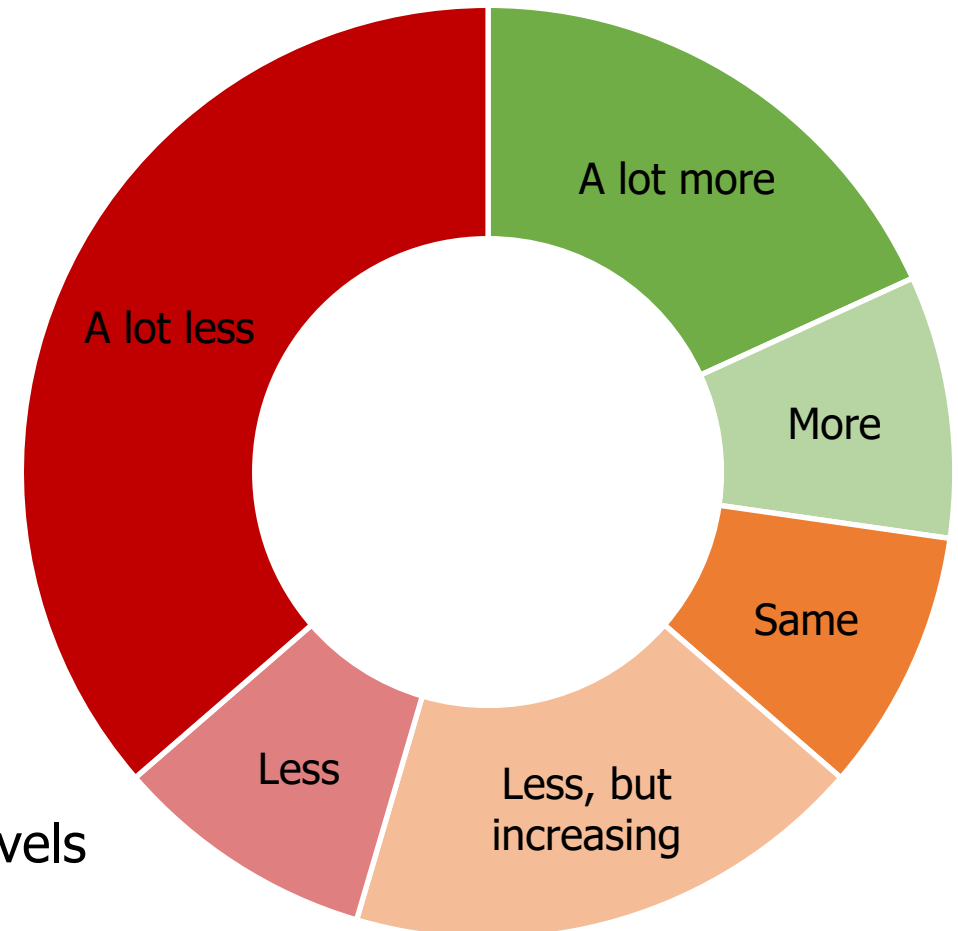
- For most companies: **stabilisation in declines**, "-50% compared to the same day last year".
- For a few companies, a clear improvement ("many more deliveries")
- Of course depending on the sector / type of goods delivered by companies



E-commerce (food, high tech, music, DIY)  
Grocery

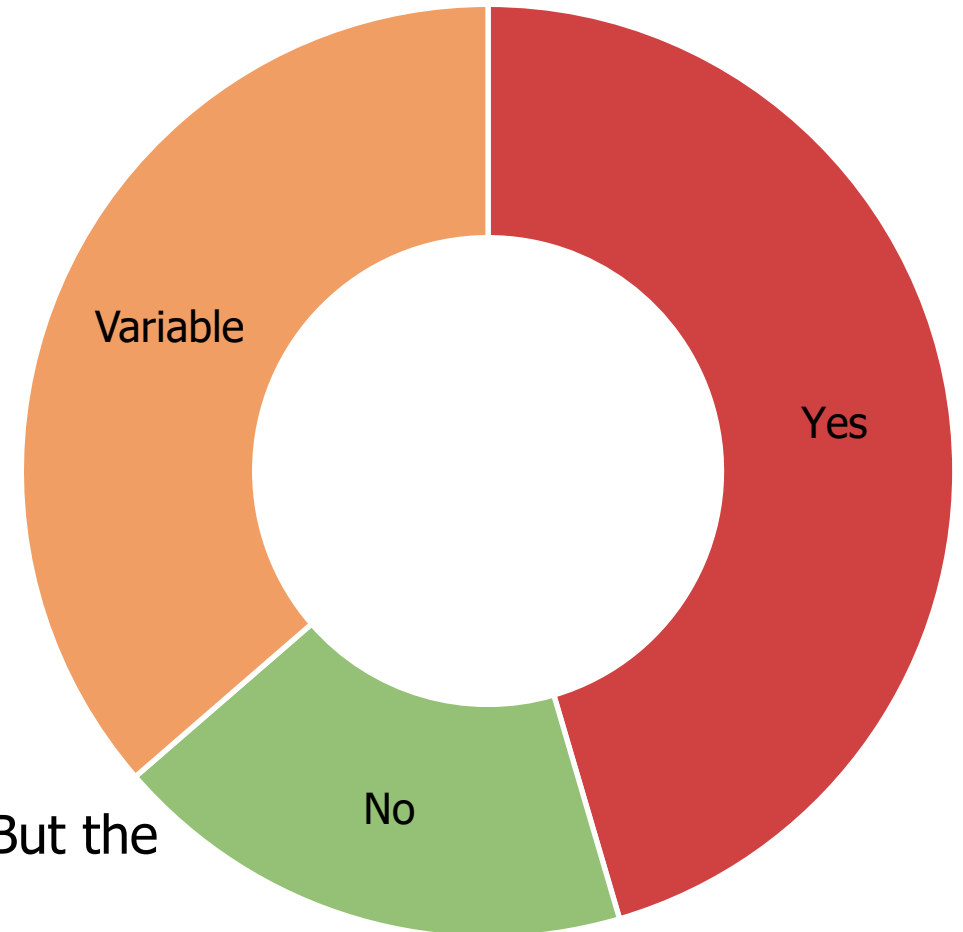
Non-food stores but also some B2C sites  
Cafés, hotels

Restaurants: B2B supplies but also persistently low levels  
for home meal deliveries



## Difficulties in obtaining/providing sanitary equipment

- Difficulties with sanitary equipment are resolving a little compared to last week, **day-to-day variability** is becoming a problem
- Initiatives to pool purchases
- Problems expressed:
  - "Rising prices"
  - "The procurement lead times are long"
  - "An insufficiently reactive market place in the Île-de-France Region".

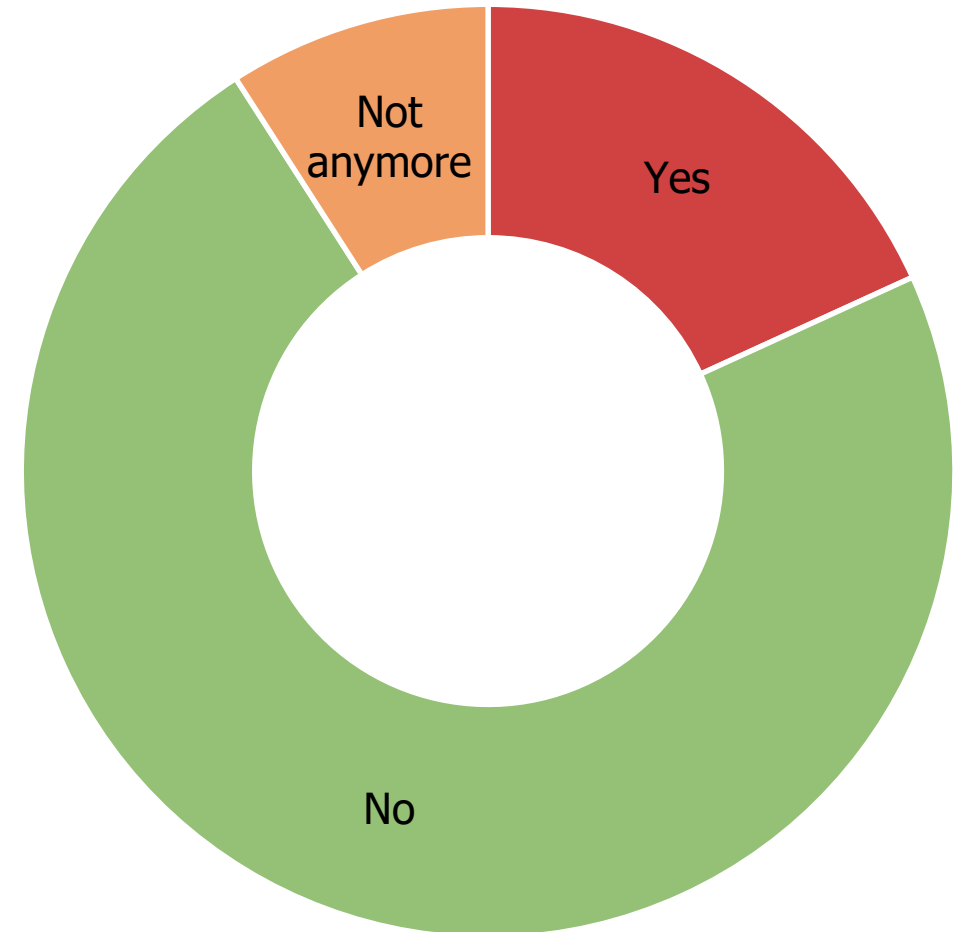


Regarding "yes": masks, masks, masks! But the rest is also missing



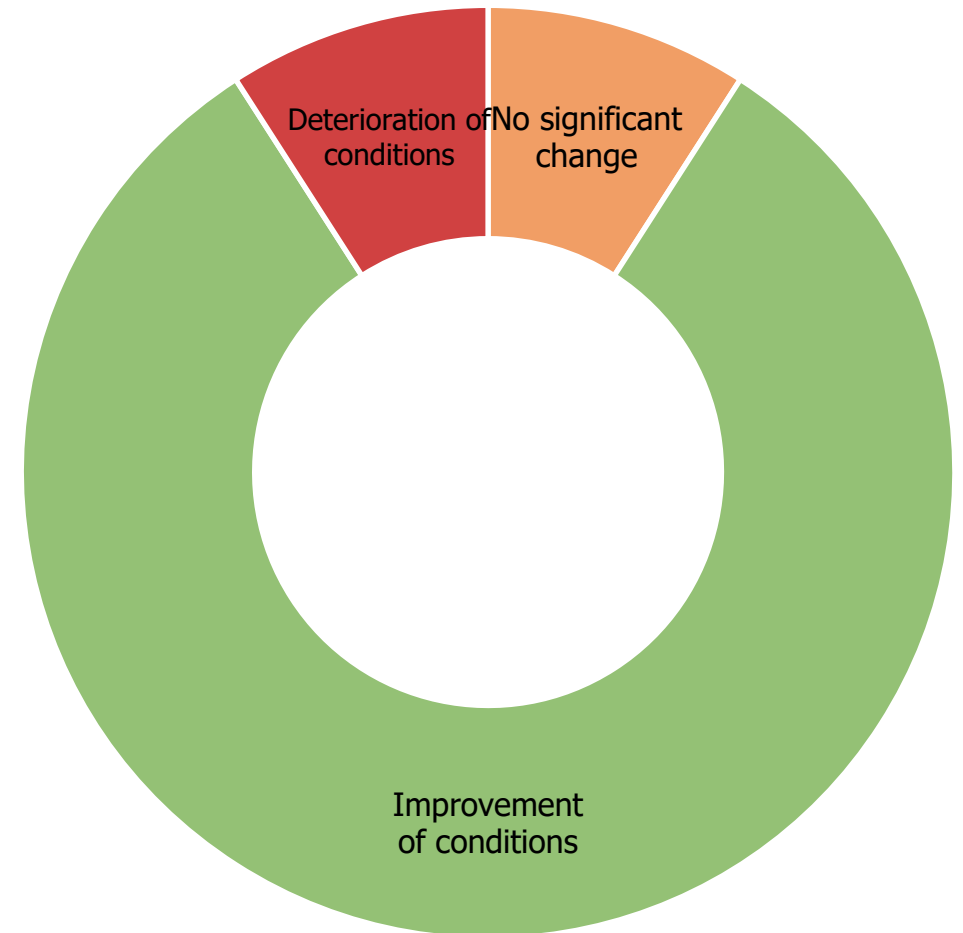
## Difficulties in managing/recruiting enough staff

- Change over the seven days: **fewer companies with recruitment difficulties**
- Difficulties remain rather on the side of digital platforms (gig workers) and large groups (mainly employees, also temporary workers)
- Two challenges were expressed:
  - Absenteeism of the teams either due to the virus itself or to health concerns, or to childcare; for some it is "in the process of being resolved"
  - "Emotional support for teams increasingly necessary"



## Difficulties with traffic, parking, access or traffic regulations

- "Super smooth traffic"
- Regulation goes along well for the moment
- Difficulties were still being expressed with regard to **abusive enforcement and fines**
- Identification of problems to accommodate delivery personnel in restaurants (for home deliveries)





# Challenges, solutions, innovations (open question)



## **New activities or ways of working, new challenges**

- Always and first and foremost, maintaining/increasing level of activities
- Managing the variability of orders on a day-to-day basis, redirecting resources to areas/clients in demand
- Waiting for an increase in restaurant home deliveries
- Solidarity initiatives are continuing, and networking platforms are being set up
- And always: to promote the importance and strategic nature of the sector in the eyes of the public, of public officials, the media, and so on

## Feedback from the transport and logistics trade groups



- On activity levels: still big differences between the members of the different organisations, depending on specialities, reorientations in progress
- Confirmations:
  - Sharp overall reductions in activity (deliveries and collections) compared to pre-confinement, "stabilisation in declines" of volumes compared to the previous week
  - Still difficulties in obtaining/providing sanitary equipment: "shortage of masks", "a market place in the Île-de-France region that is not very responsive", prices to be monitored, etc.
  - No reported difficulties in managing/recruiting enough staff
- Trends identified over the seven days:
  - Pooling purchase initiatives for masks
  - Empty return problems
  - Some problems of access to restaurants for home delivery couriers



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