

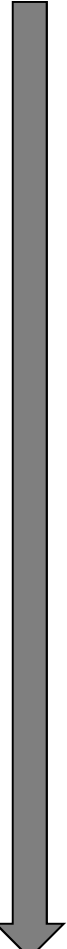
# **CaaS Nordic Webinar Transport in pandemic times – current situation, outlook**

Prof. Gernot Liedtke



Knowledge for Tomorrow

# The pandemic leads to „panic buying“ in Germany

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- 2<sup>nd</sup> March: first cases of new COVID-19 in Saxony, Germany
  - 8<sup>th</sup> March: first official death of a German due to COVID-19
  - 16<sup>th</sup> March: closure of school and childcare, border controls and entry bans
  - 18<sup>th</sup> March: social distancing
  - 22<sup>nd</sup> March: extended curfew - lockdown
  - 20<sup>th</sup> April: first relaxations – opening of non-food shops up to 800m<sup>2</sup>
  - 30<sup>th</sup> April: further relaxations
  - 13<sup>th</sup> Mai: no longer systematic controls at Germany's borders



Source: dpa/ Tom Weller; Stuttgarter Zeitung



Source: Picture by Saskia Seidel



# Phase 1: Just before the lockdown

## Customers' reactions:

- Bottlenecks due to panic buying in 'brick and mortar' shops
- Tremendous growth of e-commerce

## Challenges for logistics:

- Demand for some fast moving consumer goods (FMCG) increased up to 700% (!)  
=> Stress on Supply Chains
- Lack of truckers

## Logistics' reactions:

- willingness to cooperate among shippers and carriers
- 'ad hoc solutions' were found quickly (direct deliveries)
- quick reaction: increase of frequency and quantity



## Phase 2: during lockdown and first relaxations

- Some retail sectors experienced enormous growth in demand: Supermarkets (high quality food), Do-It-Yourself Markets, furniture/living
- Some production sectors came to a standstill: Closure of production sites e.g. automotive industry; problems in international supplies coincided with the production standstill
- Bottlenecks in logistics
  - belly freight was eliminated 100%
  - Disbalance between demand and supply in the transport markets



# Mileage broken down by origin of the trucks

	March		April	May	June	July	August	September	
	2020	2019	Change on previous year						
	[1000 km]	[1000 km]	[%]	[%]	[%]	[%]	[%]	[%]	
national	2 146 717	2 080 259	3,2	<b>-9,0</b>	<b>-13,3</b>	5,3	-2,9	-5,1	3,4
foreign countries	1 435 289	1 479 381	-3,0	<b>-20,5</b>	<b>-15,9</b>	-0,2	-2,8	-2,0	5,0
Total	3 582 006	3 559 639	0,6	<b>-13,7</b>	<b>-14,3</b>	3,0	-2,8	-3,9	4,1

- drop in mileage during shutdown (April and May)
- Foreign traffic was more affected during lockdown
- regeneration of mileage in June





# Phase 3: recovery!?

## Lkw-Maut-Fahrleistungsindex 2020

2015 = 100



Source: Bundesamt für Güterverkehr, Bundesbank, Destatis

© Statistisches Bundesamt (Destatis), 2020



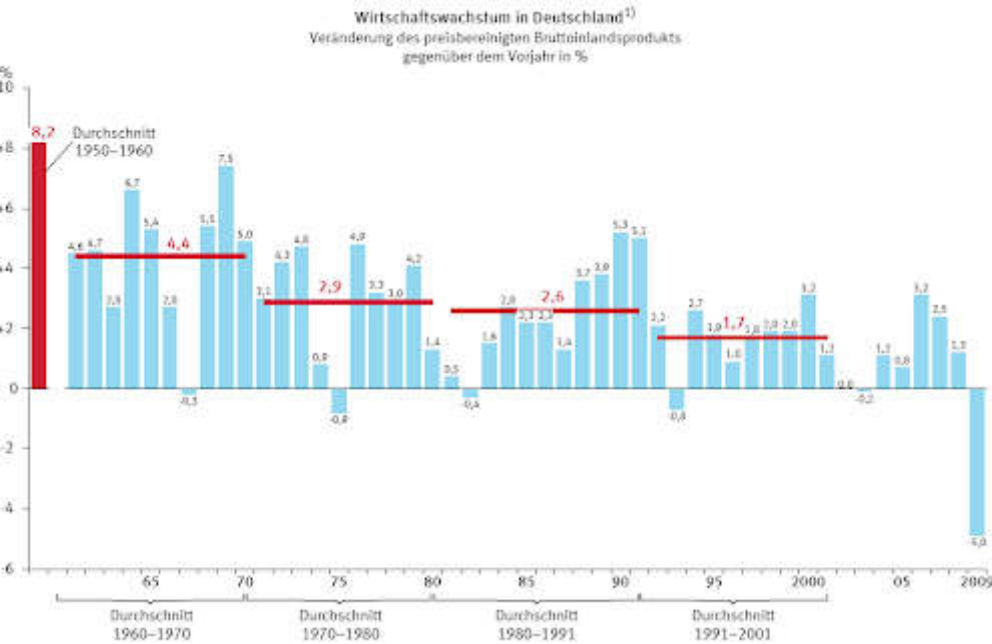
# Interim conclusion

- Some struggles happend in transport logistics
- Broder crossings, disbalances supply / demand
- Resilence of logistics systems was demonstated once again
- Other societal probems: schools, cultura sector ... much more relevant

**On track back to normality? What might follow next ....**



# Phase 4



## Global PMI and GDP



Economic cycles of about 10 years .

Short decline of economic activity

**The corona crisis might remain a „v“**

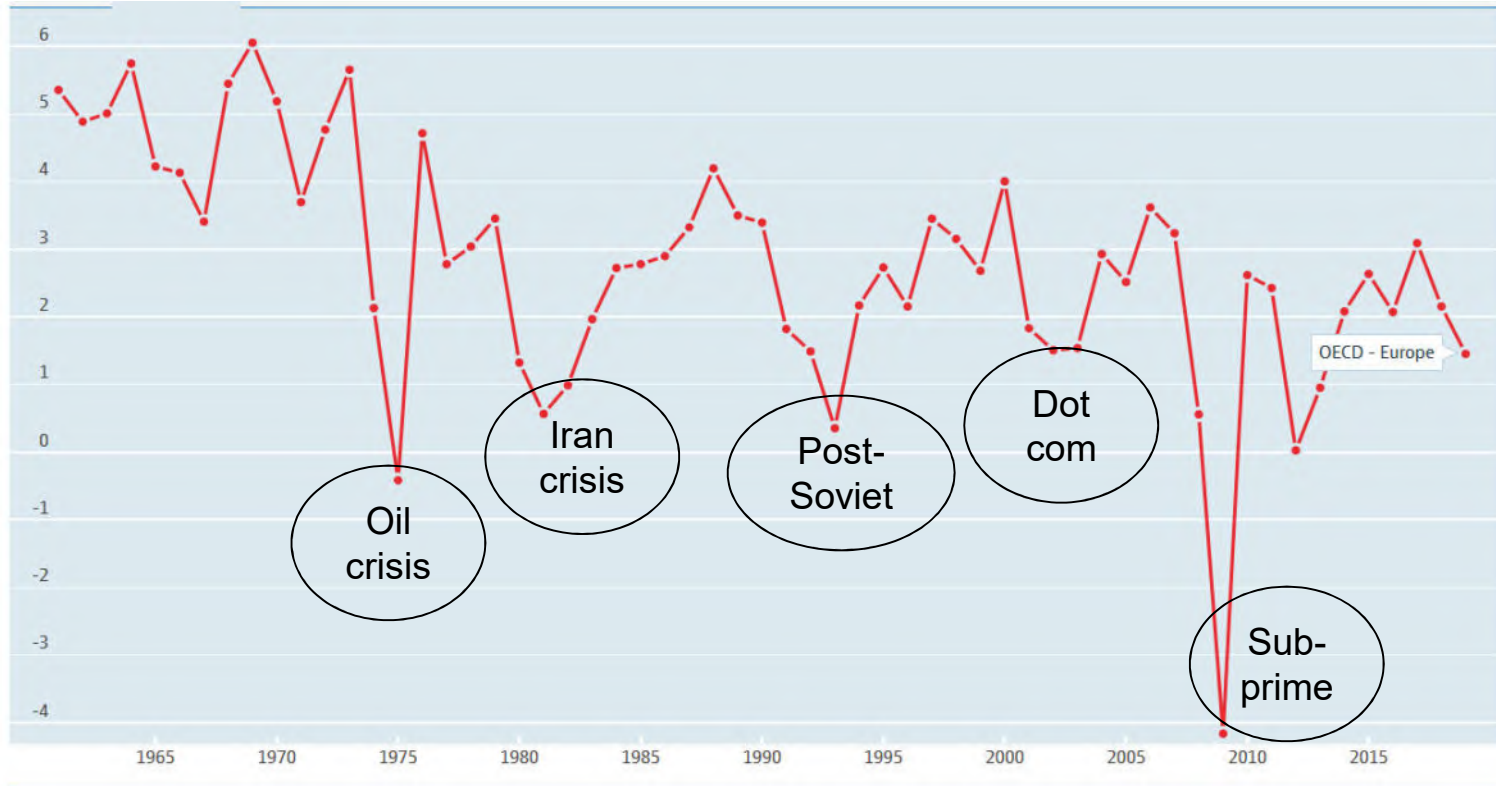
**It can act as a trigger for the next conjunctural crisis**





# Phase 4

## Changes in GDP for European OECD countries

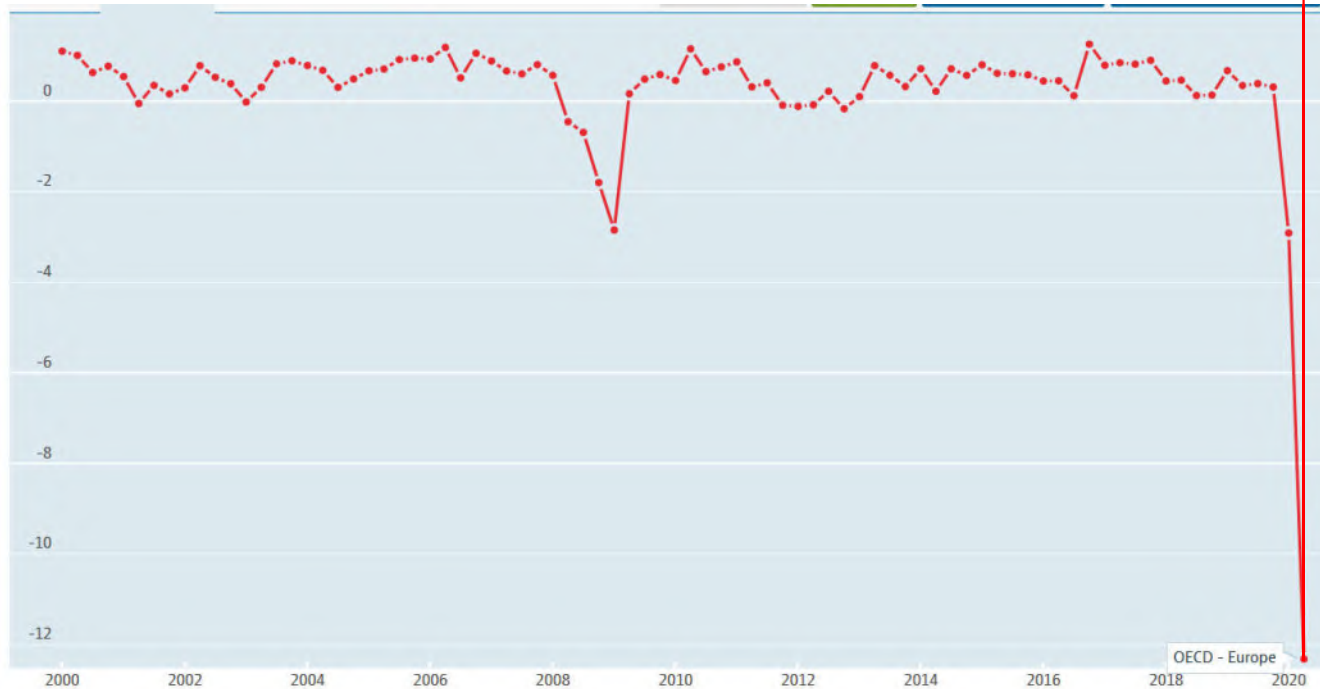


Economic cycles of about 10 years .



# Phase 4

## GDP OECD countries change in comparison with previous quartal



**The corona crisis might remain a „v“**

**It also can act as a trigger for the next conjunctural crisis**



# Phase 4

## **Structural struggles for the economy ahead:**

- Future of the combustion engine and employment in the automotive sector
- Stagnation of the globalisation processes („de-globalisation“)

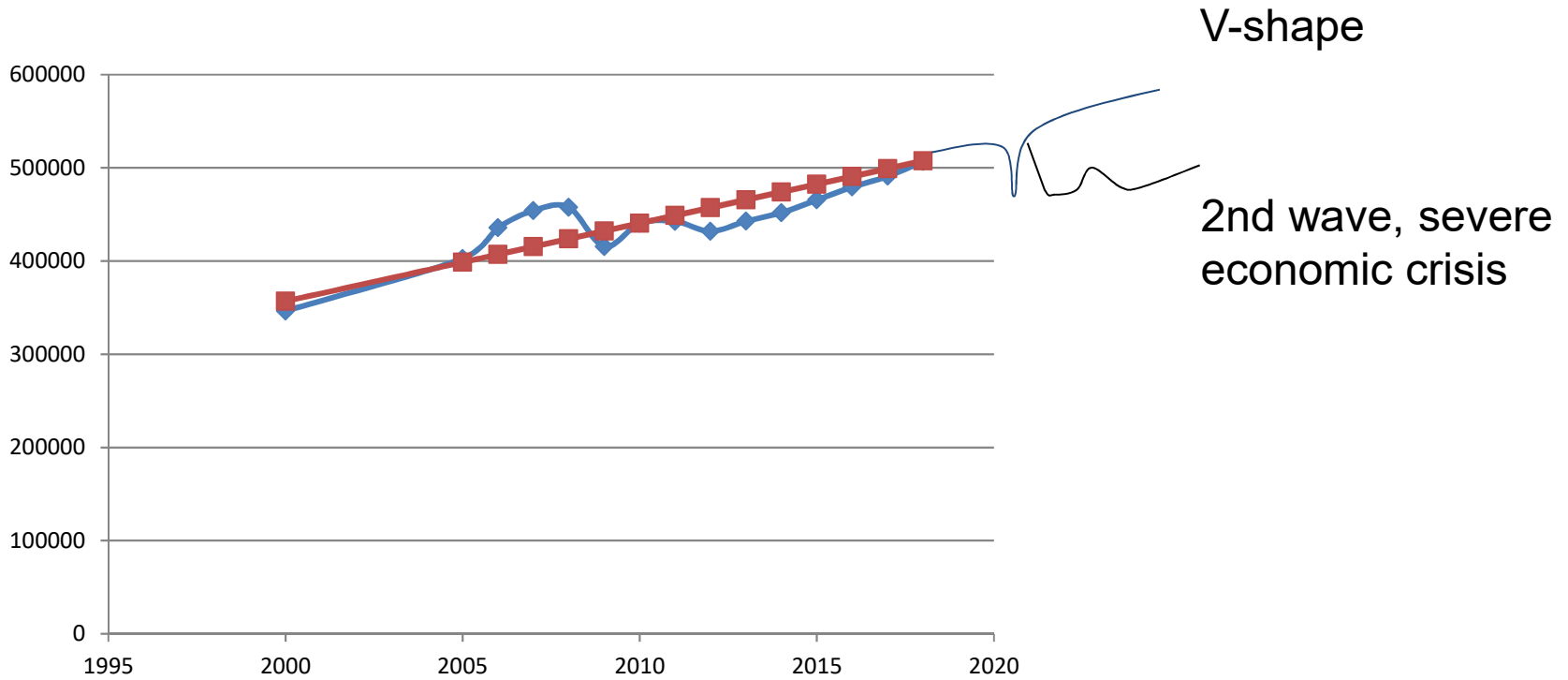
## **Socio-economic pressure on freight transport**

- Global warming
- External effects

.....



# Phase 4



Road transport forecasts vs. development



# Interim outlook

- Economic development, trade and transport are closely connected
- An economic crisis (conjunctural cycle) has been expected anyway
- At the moment, we don't see anything...
- Structural and geo-political struggles ahead

**Crisis, crisis .... or are there chances?**



# Developments under the radar...



# MaaS.fi

Mobility as a Service

