

Reduced import pipeline = less food

If there is a 4 minute additional delay as trucks clear Dover/Folkestone, the UK will have 5% less food. Not just 5% less food from the EU, but 5% less food in total – and that is probably an underestimate.

No-deal Brexit will reduce the pipeline into the UK for food and other goods, not just on Day 1, not just in the first couple of weeks, but until we've established other sources. Obviously the impact could be much more significant.

Why am I writing this piece? Not because I'm a doom-monger, but because I'm concerned. I've not seen anyone else explore in any detail this aspect of a no-deal Brexit. The modelling I'm going to talk you through here isn't heavyweight: it's so compelling, it doesn't need to be. I've detailed the various assumptions I've made, so you can question them if you want to.

Credits

First I need to credit various people with getting me thinking in this direction.

Richard Simpson, in his regular column 'Simpson Says' in the May 2018 edition of [Transport Operator](#) – in this piece, which was largely devoted to the preparations that our Dutch cousins have made and are making to cope with the impact of Brexit, Richard wrote: *"Currently, laden freight trailers cross on a 24-hour turnaround basis: goods ordered at 2 pm from the UK are in retailers' warehouses by 5 am the following day; even the small delays on both sides of the water could see that rotation extended to 48-hours, doubling the number of trailers required."* I do recommend signing up for your free copy if you work in road transport.

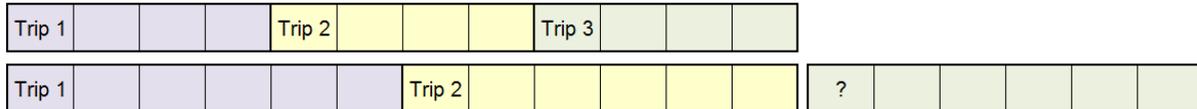
Professor Alan McKinnon, for his [Linkedin post](#)/blog on the need to stockpile or not, written in early August - Alan comments on food shortages *"In theory, they should only last for the additional number of days that products spend in the supply chain because of the new customs arrangements. For example, if a 4 day delivery of fruit from a supplier in Italy to a retailer's distribution centre in the UK were extended to 6 days post-Brexit, there would be a two day period of short supply. Thereafter, the system should adjust to the longer transit time and the availability of the product in the shops return to normal."*

Alan references the [FRC Food Brexit Briefing](#) by **Professor Tim Lang and other authors** published in July – I linked through to this and among many other things read: *"For the USA to replace the combined food imports from the other nine of the top 10 would require a vast food flotilla and logistics operation, exceeding that of the 1940-45 Atlantic Convoys – which would need to be ready to start in nine months' time!"* NB That's now seven months.

Kirsty Adams of SHD Logistics for asking me to participate in [The Logistics Podcast](#) because she was interested in the comment that I'd added to Alan's LinkedIn piece ...and that got me thinking. Liking analysis (it's my job), I set up a little model and was then shocked at the implications. In order not to come across as a doom-monger, I probably underplayed the impacts in the podcast piece! Again, SHD Logistics comes highly recommended.

Key analysis

Alan’s example was designed to illustrate what might happen if there was a one-off delay on Brexit Day 1. But what if that delay continues? While hopefully OTT for an ongoing basis, and putting two way movements and drivers hours implications to one side for a moment(!), Alan’s example is great because of its easy maths: in the same time that it currently takes a truck to do three four-day trips, that same equipment can only do two six-day trips. So you either need 50% more trucks to do the same work, or you have a 33% capacity reduction in the import pipeline. It looks like this:



So here’s the results of my modelling, followed by the assumptions I made, so you can form your own view on how conservative or otherwise I’ve been.

Results

If you assume a 4 minute additional delay* (see below for all the assumptions related to these asterisks) for each truck to clear the port, this will give extra queueing time of c5hrs**. Applied to a typical mix of goods vehicles coming across the Dover Strait***, post Brexit this equates to a total capacity reduction of 18%****. The UK imports c30%***** of its food from the EU (c40% of fruit and veg) and will, therefore, have 5% less food – not just from the EU, but in total.

Conclusions

No-deal Brexit will reduce the pipeline into the UK for food and other goods, not just on Day 1, not just in the first couple of weeks, but until we’ve established other sources – like growing more of our own food or importing from further flung locations. Obviously if the additional delay is longer than 4 minutes per truck, the impact could be much more significant. It wouldn’t be wise, but we could choose to suspend checks, but we can be absolutely certain that won’t happen in the other direction – no reason why it should.

This delay will impact on prices on top of tariffs, clearance charges and any impact on sterling – it will put up the price of the movement and make that look a lot less attractive if you’re a mainland driver who could be doing some other journey, and food will be competing with higher value loads for limited resource - higher value loads which can justify a higher rate for transport.

Now the non-analytical (emotional?) bit: I always try to buy British food – not because I’m a little Englander, but because I’ve always been concerned about our country’s lack of a food strategy. The government needs to do some serious planning. Brexit will affect the poorest hardest – if you’re reading this, you can probably afford to put a few extra tins in the kitchen cupboard, but if you’re already dependent on going to a food bank...?

No-deal Brexit = less food, and particularly less of the relatively perishable 5-a-day that are good for us, unless we start doing something. How close to D-Day (D for Disaster) will the government leave it to declare no deal? How long does that give everyone to prepare? It’s not reasonable or realistic to expect UK hauliers to invest in lots of extra kit “just in case”, particularly when they don’t even know if they’re going to be allowed to cross the channel in any numbers.

If you’re interested in more detail, please contact Kirsten Tisdale, Aricia Limited, 01295 758875

Assumptions

NB I've tried always to be conservative.

* **Max Fac** (impossible I hear you say!)

Although I know most people don't believe that Max Fac is possible in the time scale, this [DHL report](#) states "checks at the currently most automated border between Sweden and Norway take between 3 and 9 minutes on average to clear customs, causing long queues of trucks during peak hours" – my assumption of 4 minutes plus a current check time of 2 minutes is right in the middle of this range. NB It currently takes [c20 minutes](#) to clear non-EU vehicles.

** **5 hour delay**

I've worked with a five hour delay at non-peak times - [Dr Ke Han](#) of Imperial College calculated that if checks took an average of four minutes, the queue on the M20 would reach over 29 miles and result in a wait time of five hours.

NB That is likely to be on both sides of the channel. Also worth noting that I've considered an active queue which is moving, but after 4.5 hours of queuing this will have to be managed as it will have exceeded one period of drive time. Beyond that, some delay may be spent in a shed rather than in a truck, waiting for inspection.

*** **Vehicle loads are from mid-point of country of registration**

Assumes that food crossing the Dover Strait comes from same locations as mid-point (as considered by Google) of country of [registration of vehicle](#) with London as the delivery point.

If a Polish vehicle is picking up food in France, any delay will then represent a larger proportion of total journey. Assumptions have also been made re movements that are not across the Dover Strait (including those across the Irish Sea) – the assumption has been to always exclude the shorter journeys, meaning that this is a conservative assumption and that if shorter journeys replaced longer ones, again the delay would represent a larger proportion of journey time.

**** **Single-manned and 40mph average**

Other assumptions in this element are that the vehicle is single-manned and that the vehicle achieves an average of 40mph - if a vehicle is double-manned or achieves a higher average speed then any delay will represent a larger proportion of total journey. I've also assumed that drive time is the significant factor for the length of international journeys.

***** **30% of UK food comes from EU**

This assumption comes from <http://bit.ly/FoodStats2017>

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