

**A Study on Impact of Coronavirus on Fleet and Trucking
Business**

**SURVEY
JOINTLY DONE BY**

The imposition of world's biggest lockdown has compounded the griefs of India's trucking industry. Potential travel restricts, excessive bureaucratic monitoring, and crew crunch have raised alarms for freight haulers. This study is based on detailed interviews of 248 goods transport operators across the country who shared their views on challenges faced by them during this unprecedented time.

Q1 Your major Trucking Business is

Fleet Size	More than 100 Trucks	6 to 99 Trucks	2 to 5 Trucks	Owner Driver (One Truck)	All India
Within City	0%	0%	18%	63%	17%
Within State	11%	27%	59%	27%	30%
Interstate (National)	89%	73%	22%	10%	53%

Q2 Total Number of Trucks in your fleet

	East	North	South	West	All India
Fleet Size (More than 100 Trucks)	13	17	7	11	48
Fleet Size (6 to 100 Trucks)	26	26	16	31	99
Fleet Size (2 to 5 Trucks)	14	11	8	17	49
Owner Driver (One Truck)	13	13	10	16	52
Grand Total	66	67	41	75	249

Q3

Which one of the following are major problems at present times?
(Please tick THREE Priority issues)

Q3 (a) Which one of the following are MAJOR PROBLEMS at present times

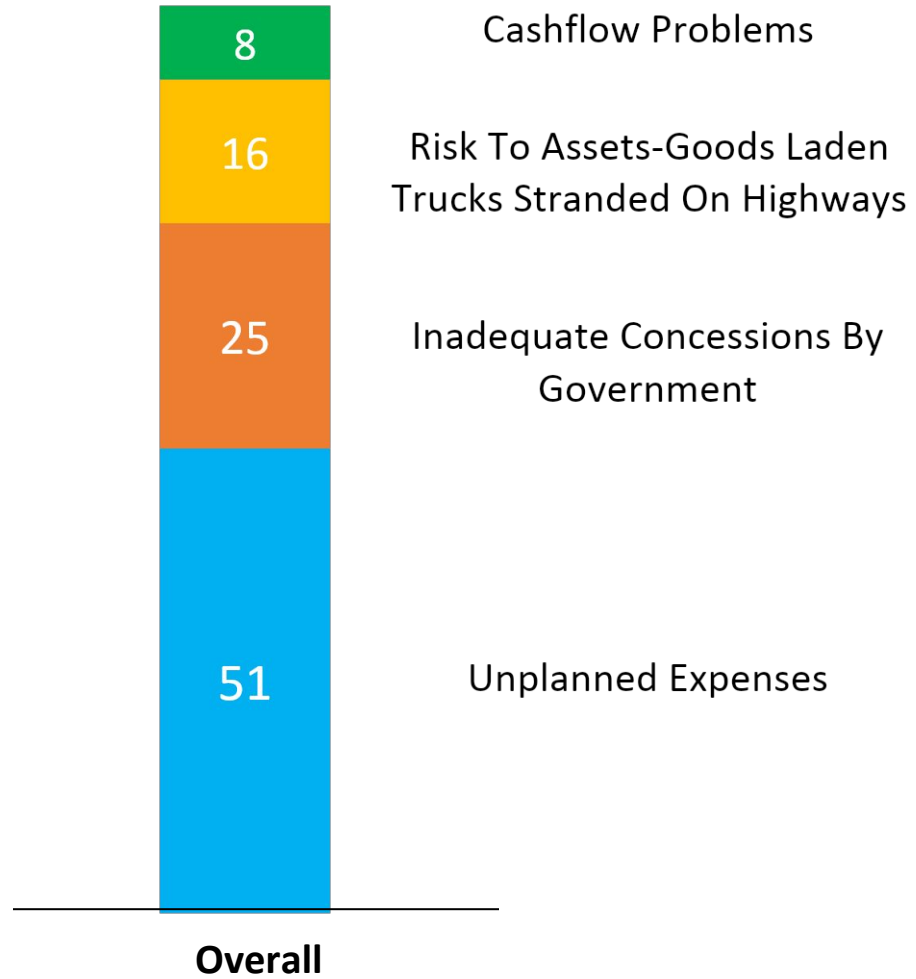
	More than 100 Trucks	6 to 99 Trucks	2 to 5 Trucks	Owner Driver (One Truck)	All India
Unplanned expenses	63%	55%	41%	42%	51%
Cashflow Problems	46%	45%	59%	56%	50%
Inadequate Concessions by Government	50%	32%	39%	48%	40%
Restarting problems once this epidemic over	27%	36%	49%	42%	38%
Risk to Assets-Goods laden Trucks stranded on Highways	40%	47%	27%	21%	36%
Evacuation and safe return of Drivers	31%	36%	29%	31%	33%
Fear of Going out of Business	17%	25%	31%	33%	26%
Police Harassment to Drivers of stranded Trucks	21%	25%	24%	21%	23%

Multiple responses

Q3 (b) Major Problems face by fleet operators on overall basis

Major Problem Areas	Percent Consenting Fleet Owners
Unplanned expenses	51.22
Inadequate Concessions by Government	24.80
Risk to Assets-Goods laden Trucks stranded on Highways	15.85
Cashflow Problems	8.13
Total	100.00

Bar representation of Q3(b) reponses



Q3 (c) Major problem areas for fleet size number of trucks 100 and above

Major Problem Areas	Percent Consenting Fleet Owners
Unplanned expenses	62.50
Inadequate Concessions by Government	27.08
Risk to Assets-Goods laden Trucks stranded on Highways	8.33
Cashflow Problems	2.08
Total	100.00

Q3(d) Major Problem areas for fleet size number of trucks 2 to 5

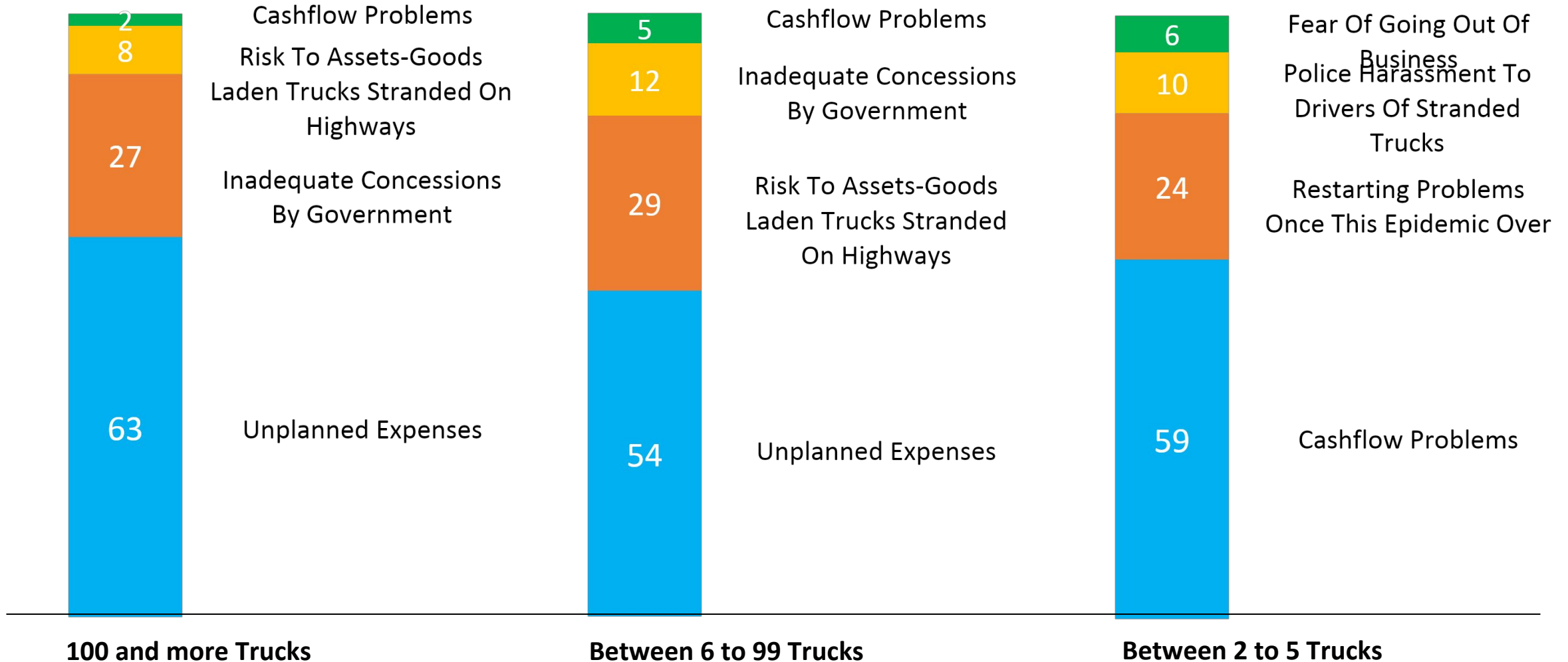
Major Problem Areas	Percent Consenting Fleet Owners
Cash flow Problems	59.18
Restarting problems once this epidemic over	24.49
Police Harassment to Drivers of stranded Trucks	10.20
Fear of Going out of Business	6.12
Total	100.00

* In this case the analysis yielded 4 instead of 3 factors

Q3(e) Major problem areas for fleet size number of trucks 6 to 99

Major Problem Areas	Percent Consenting Fleet Owners
Unplanned expenses	54.00
Risk to Assets-Goods laden Trucks stranded on Highways	29.00
Inadequate Concessions by Government	12.00
Cashflow Problems	5.00
Total	100.00

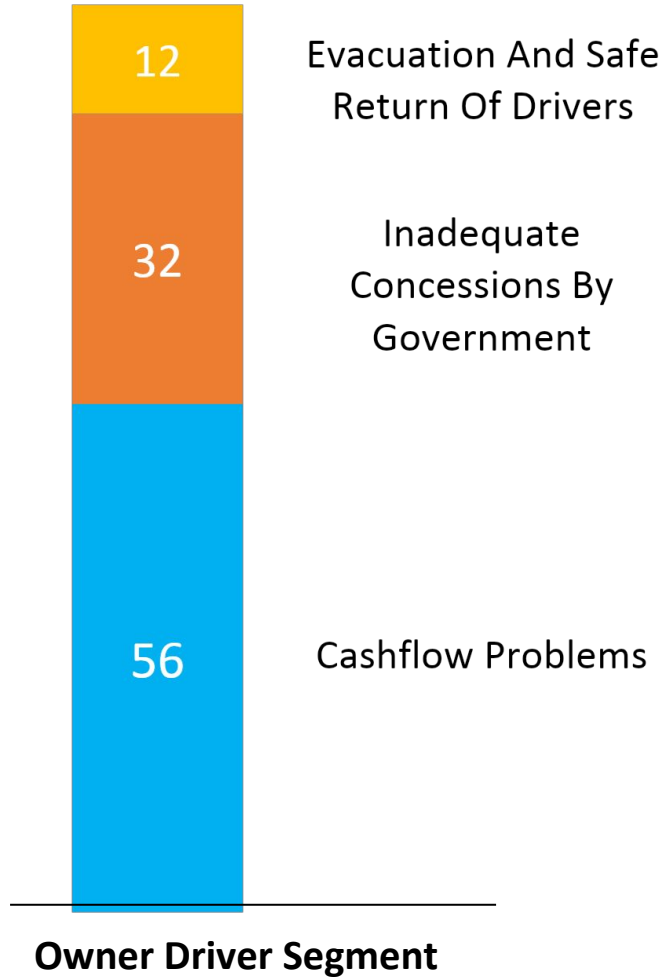
Bar graph representation of responses received for Q 3(c), Q 3(d), Q 3(e)



Q3(f) Major problem areas owner-driver (One Truck)

Major Problem Areas	Relative contributions to the REACH(%)
Cash flow Problems	55.77
Inadequate Concessions by Government	32.69
Evacuation and safe return of Drivers	11.54
Restarting problems once this epidemic over	0.00
Total	100.00

Bar graph representation of response received for Q3 (f)



Q4 Do you have cases where drivers have abandoned your truck and left for home (Also consider cases where contact is lost, and you know nothing about truck or driver)

Fleet Size →	100 & More Trucks	Between 6 to 99 Trucks	Owner Driver segment & Fleets with Trucks below Six	All India Average From Total Sample
Category wise proportion of fleets in Percentage with Stranded Trucks	29	31	8	20
Number of Stranded Trucks per fleet (Median Value)	8	5	2	5

Q5

What are the problems faced by these stranded drivers?
Select & tick **THREE** most important ones

Q5(a) What are the problems faced by these stranded drivers

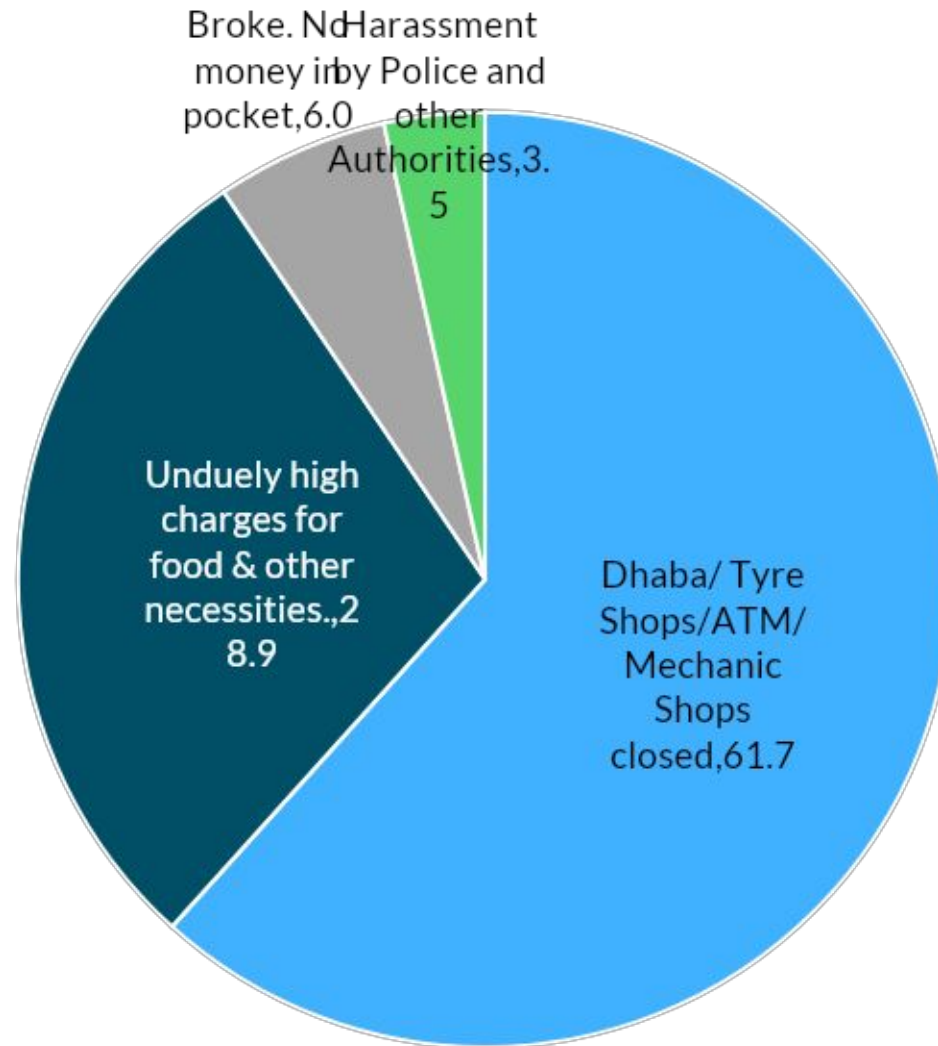
	More than 100 Trucks	6 to 99 Trucks	2 to 5 Trucks	Owner Driver (One Truck)	All India
Dhaba/ Tyre Shops/ATM/ Mechanic Shops closed	71%	57%	41%	27%	50%
Unduely high charges for food & other necessities.	46%	53%	53%	42%	49%
Become Demoralised,Home sick,Clueless, Panicky	56%	43%	39%	31%	42%
Broke. No money in pocket	29%	32%	41%	48%	37%
Harassment by Police and other Authorities	31%	32%	22%	17%	27%
Get no cooperation from local population	23%	21%	31%	31%	25%
Unable to contact you	10%	13%	10%	6%	10%

Multiple responses

Q5(b) Major problems faced by these stranded drivers

Major Problem Areas	Percent Consenting Fleet Owners
Dhaba/ Tyre Shops/ATM/ Mechanic Shops closed	61.69
Unduely high charges for food & other necessities.	28.86
Broke. No money in pocket	5.97
Harassment by Police and other Authorities	3.48
Total	100.00

Pie chart representation of responses for Q5 (b)



Q6

What are your apprehensions on Business related issues?
Tick only THREE most important ones

Q6(a) What are your apprehensions on business related issues?

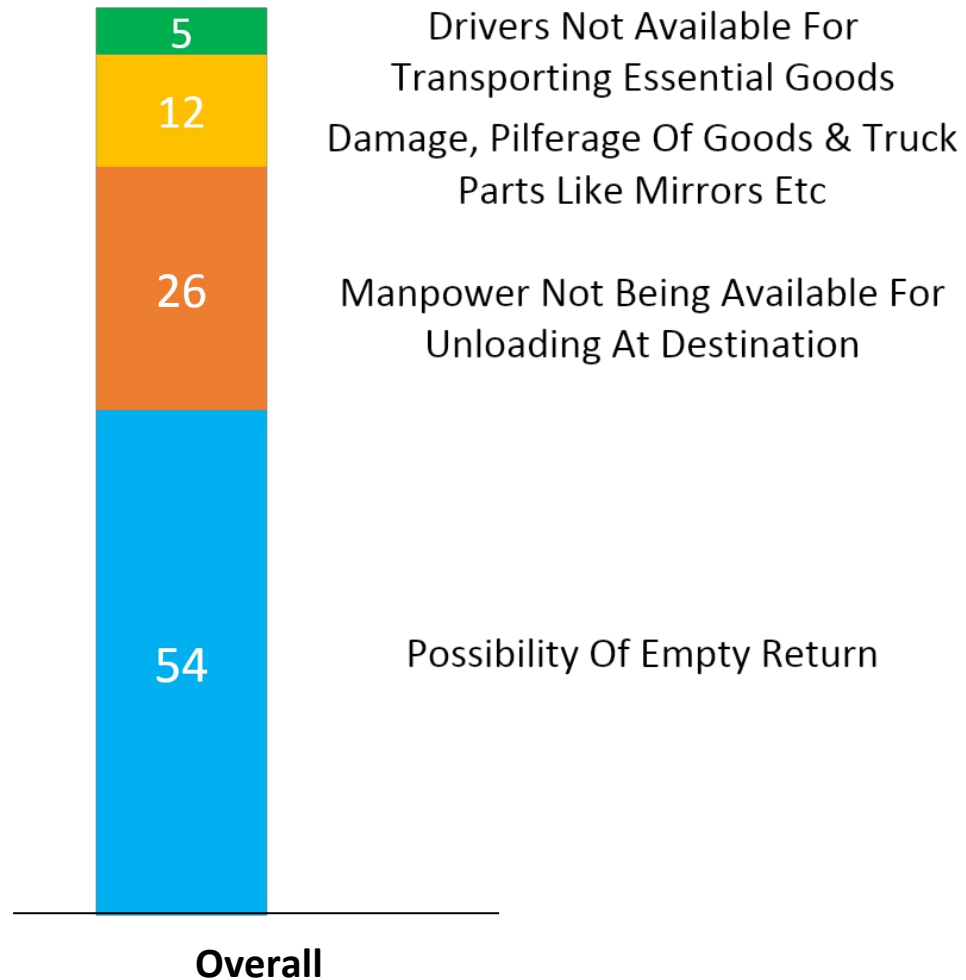
	More than 100 Trucks	6 to 99 Trucks	2 to 5 Trucks	Owner Driver (One Truck)	All India
Possibility of Empty Return	58%	49%	45%	60%	52%
Manpower not being available for Unloading at destination	50%	58%	43%	52%	52%
Damage, Pilferage of Goods & Truck parts like Mirrors etc	44%	42%	37%	25%	38%
Drivers not available for transporting essential goods	25%	31%	39%	27%	31%
Vehicle passing is due	33%	29%	31%	27%	30%
Non acceptance by consignee at destination	27%	28%	27%	27%	27%
Expiry of E-Way Bill before trip is completed	19%	22%	18%	10%	18%
Vehicle Insurance expires enroute	13%	13%	18%	17%	15%
Consignors of essential goods are putting pressure for freight reduction	48%	13%	4%	29%	7%

Multiple responses

Q6(a) Major apprehensions on overall basis

Major Apprehensions	Percent Consenting Fleet Owners
Possibility of Empty Return	53.50
Manpower not being available for Unloading at destination	26.34
Damage, Pilferage of Goods & Truck parts like Mirrors etc	12.35
Drivers not available for transporting essential goods	4.53
Vehicle passing is due	3.29
Total	100.00

Bar graph representation of responses received for Q6 (a)



Q6 (b) Major apprehensions of fleet size 100 trucks & more

Major Apprehensions	Percent Consenting Fleet Owners
Possibility of Empty Return	58.33
Damage, Pilferage of Goods & Truck parts like Mirrors etc	25.00
Non acceptance by consignee at destination	12.50
Vehicle passing is due	4.17
Total	100.00

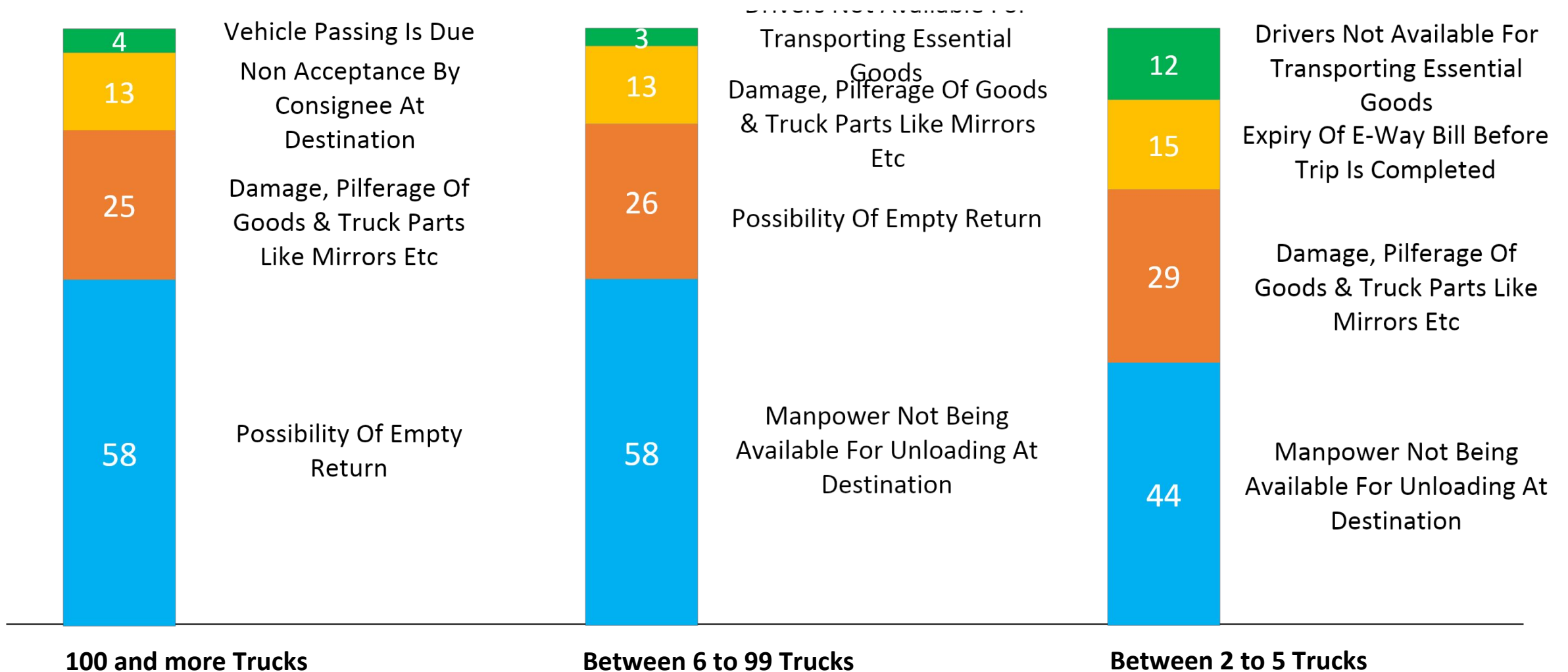
Q6 (c) Major apprehensions fleet size 6 to 99 trucks

Major Apprehensions	Percent Consenting Fleet Owners
Manpower not being available for Unloading at destination	58.16
Possibility of Empty Return	25.51
Damage, Pilferage of Goods & Truck parts like Mirrors etc	13.27
Drivers not available for transporting essential goods	3.06
Total	100.00

Q6 (d) Major apprehensions for fleet size 2 to 5 Trucks

Major Apprehensions	Percent Consenting Fleet Owners
Manpower not being available for Unloading at destination	43.75
Damage, Pilferage of Goods & Truck parts like Mirrors etc	29.17
Expiry of E-Way Bill before trip is completed	14.58
Drivers not available for transporting essential goods	12.50
Total	100.00

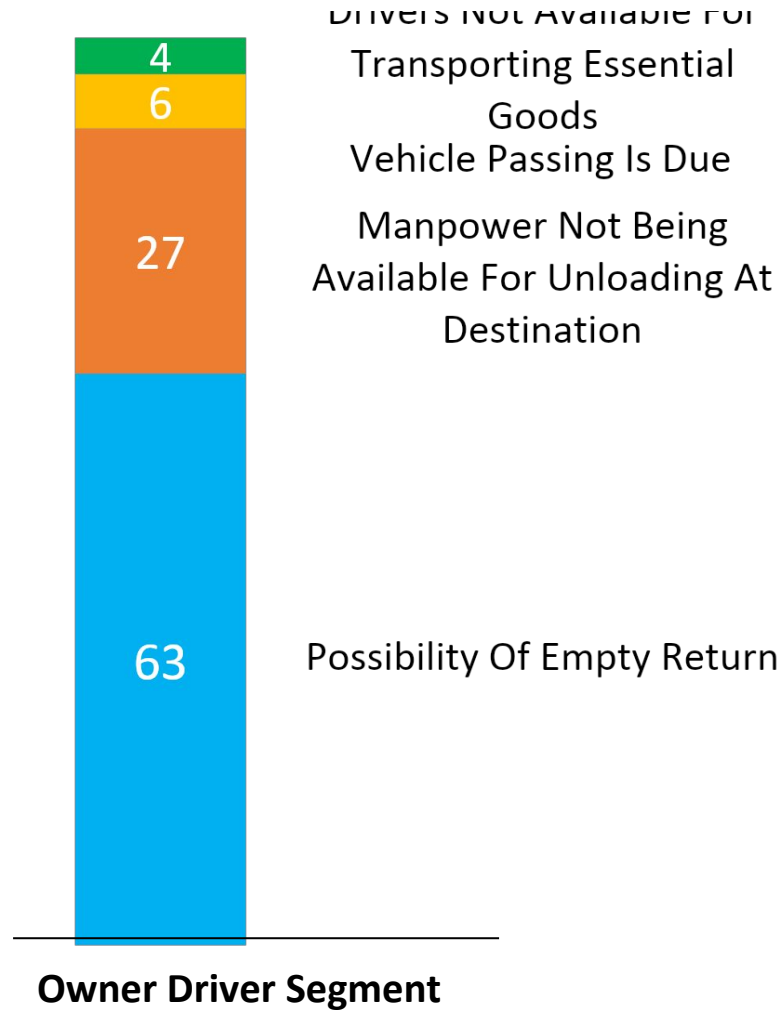
Bar graph representation of responses received for Q6 (b), & (d)



Q6(e) Major apprehensions for owner- driver

Major Apprehensions	Percent Consenting Fleet Owners
Possibility of Empty Return	63.27
Manpower not being available for Unloading at destination	26.53
Vehicle passing is due	6.12
Drivers not available for transporting essential goods	4.08
Total	100.00

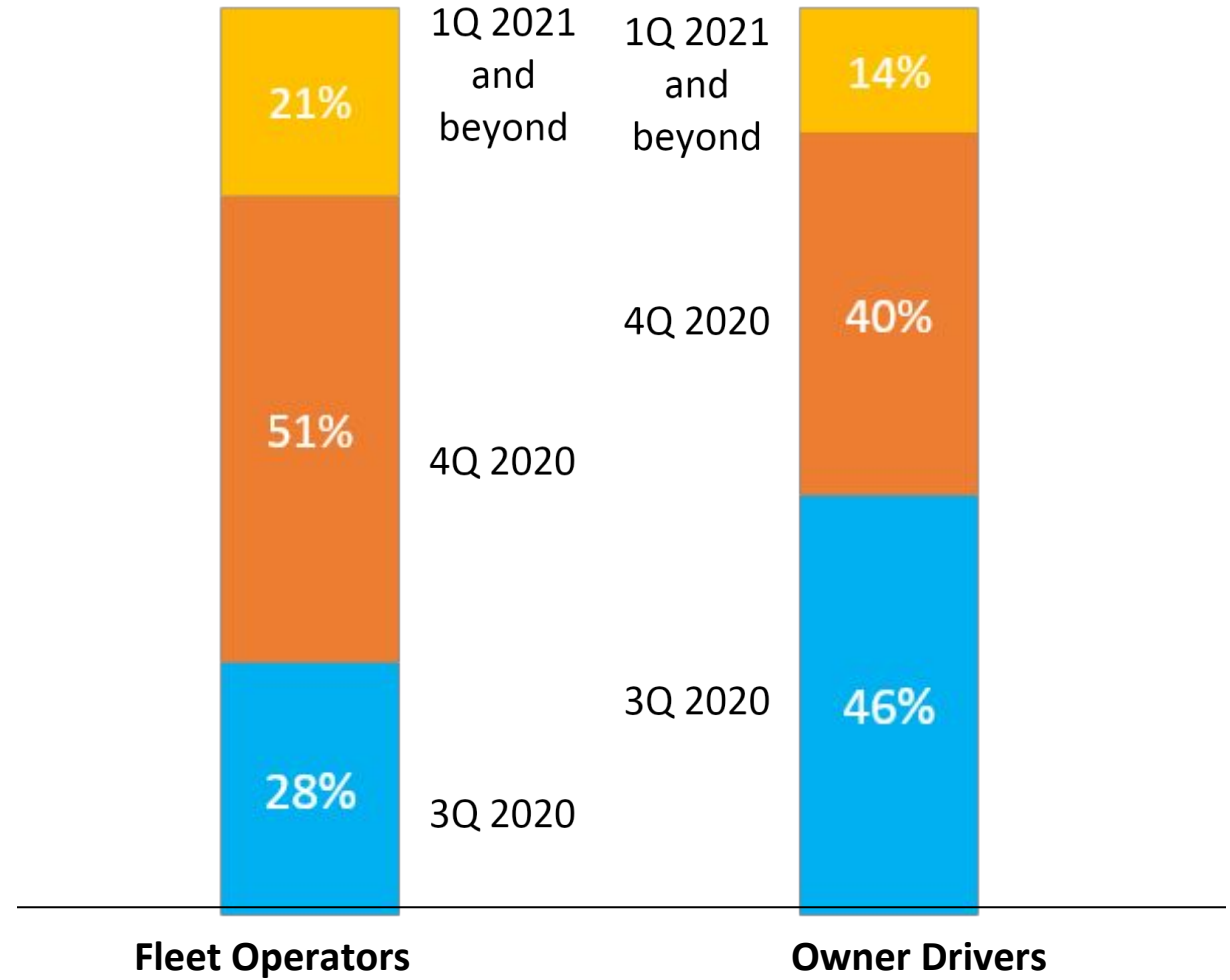
Bar graph representation of responses received for Q6 (e)



Q7 Assuming that, epidemic subsides as expected, in our estimate when will the normalcy resume ?

	3Q 2020	4Q 2020	1Q 2021 and beyond
Fleet Operators	28%	51%	21%
Owner Drivers	46%	40%	14%

Bar graph representation of responses received for Q7



Q8

What are the prerequisite for a smooth restart
Tick only **THREE** most important ones

Q8(a) What are the prerequisite for a smooth restart

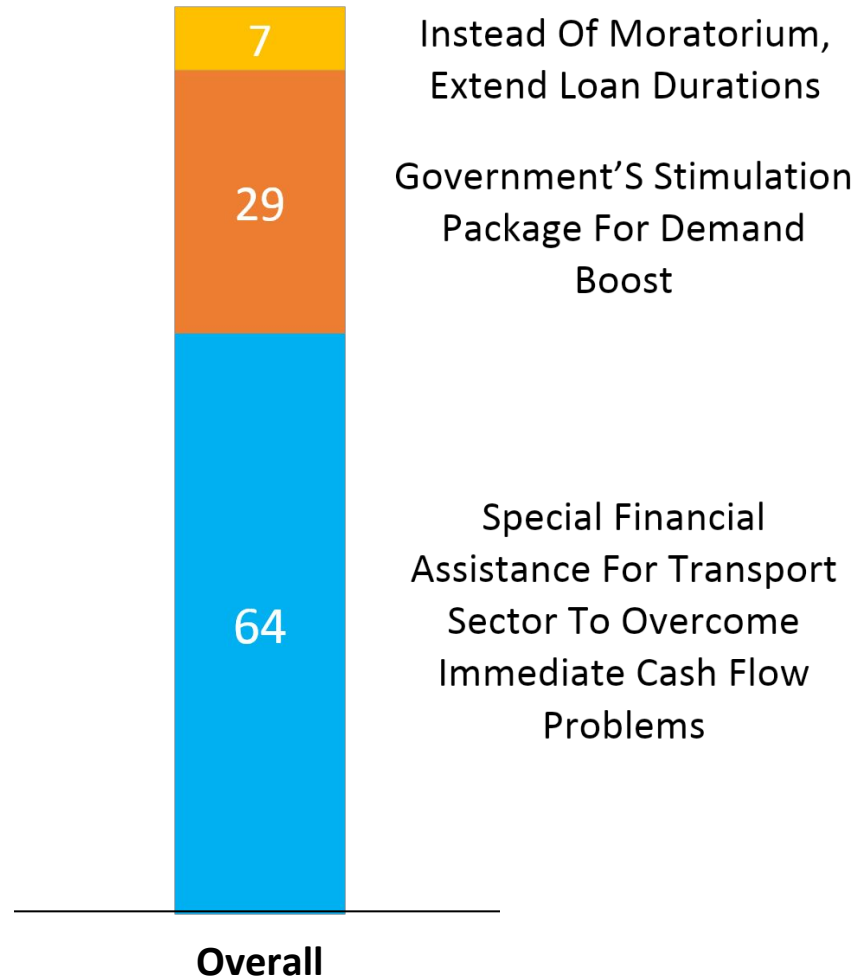
	More than 100 Trucks	6 to 99 Trucks	2 to 5 Trucks	Owner Driver (One Truck)	All India
Special Financial Assistance for Transport sector to overcome immediate cash flow problems	63%	65%	59%	69%	64%
Quick release of pending bills by consignors	67%	64%	61%	60%	63%
Government's stimulation package for Demand boost	46%	65%	63%	50%	57%
Instead of moratorium, extend loan durations	42%	36%	43%	60%	43%
Special provisions for MSME sector as most transporters belong to MSME	35%	39%	41%	35%	38%
Return of Drivers and assistants	40%	27%	27%	21%	28%

Multiple responses

Q8(b) Major prerequisite for smooth restart overall basis

Major Prerequisite for smooth restart	Percent Consenting Fleet Owners
Special Financial Assistance for Transport sector to overcome immediate cash flow problems	63.86
Government's stimulation package for Demand boost	29.32
Instead of moratorium, extend loan durations	6.83
Total	100.00

Bar graph representation of Q8(b) responses



Q8(c) Major Prerequisite for a smooth restart for fleet size more than 100

Major prerequisites for a smooth restart	Percent Consenting Fleet Owners
Quick release of pending bills by consignors	66.67
Return of Drivers and assistants	27.08
Special Financial Assistance for Transport sector to overcome immediate cash flow problems	6.25
Total	100.00

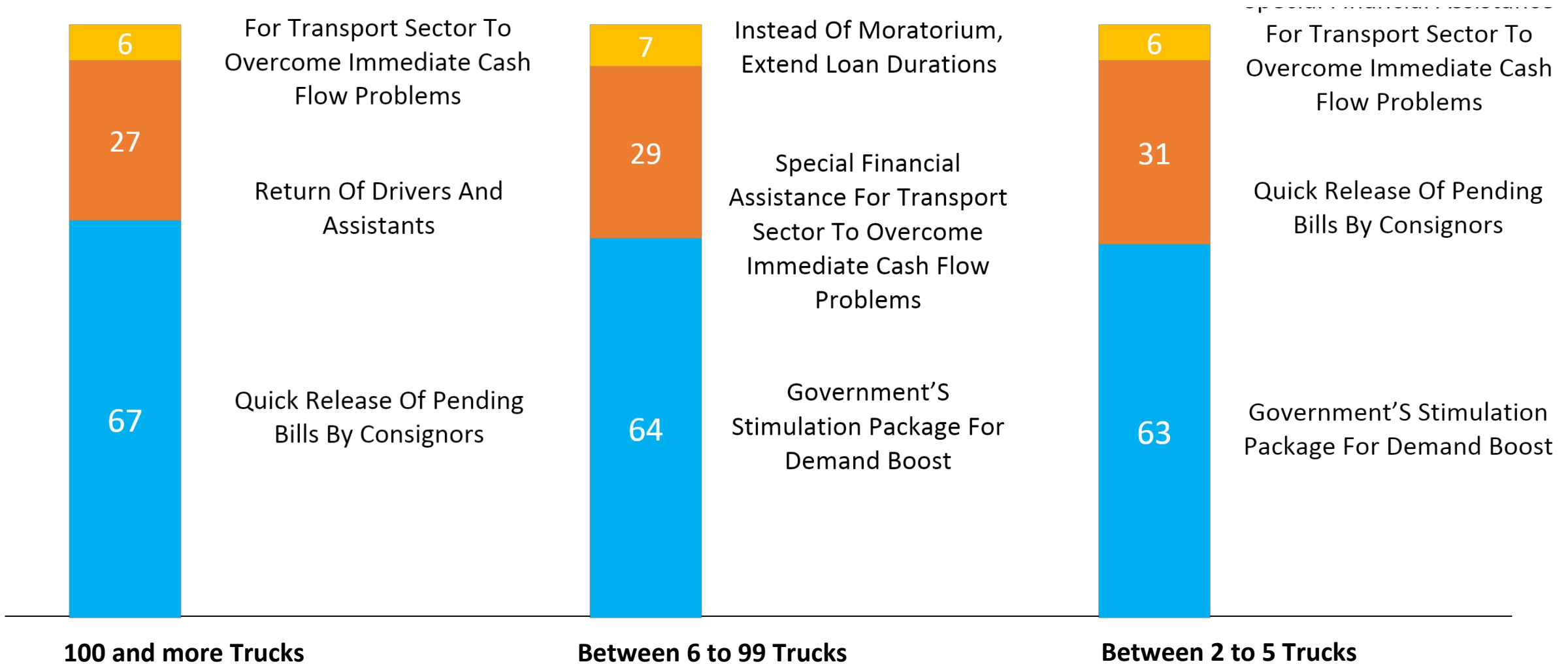
Q8(d) Major Prerequisites for a smooth restart fleet size 6 to 99 Trucks

Major prerequisites for a smooth restart	Percent Consenting Fleet Owners
Government's stimulation package for Demand boost	64.00
Special Financial Assistance for Transport sector to overcome immediate cash flow problems	29.00
Instead of moratorium, extend loan durations	7.00
Total	100.00

Q8(e) Major prerequisites for a smooth restart fleet Size 2 to 5 Trucks

Major prerequisites for a smooth restart	Percent Consenting Fleet Owners
Government's stimulation package for Demand boost	63.27
Quick release of pending bills by consignors	30.61
Special Financial Assistance for Transport sector to overcome immediate cash flow problems	6.12
Total	100.00

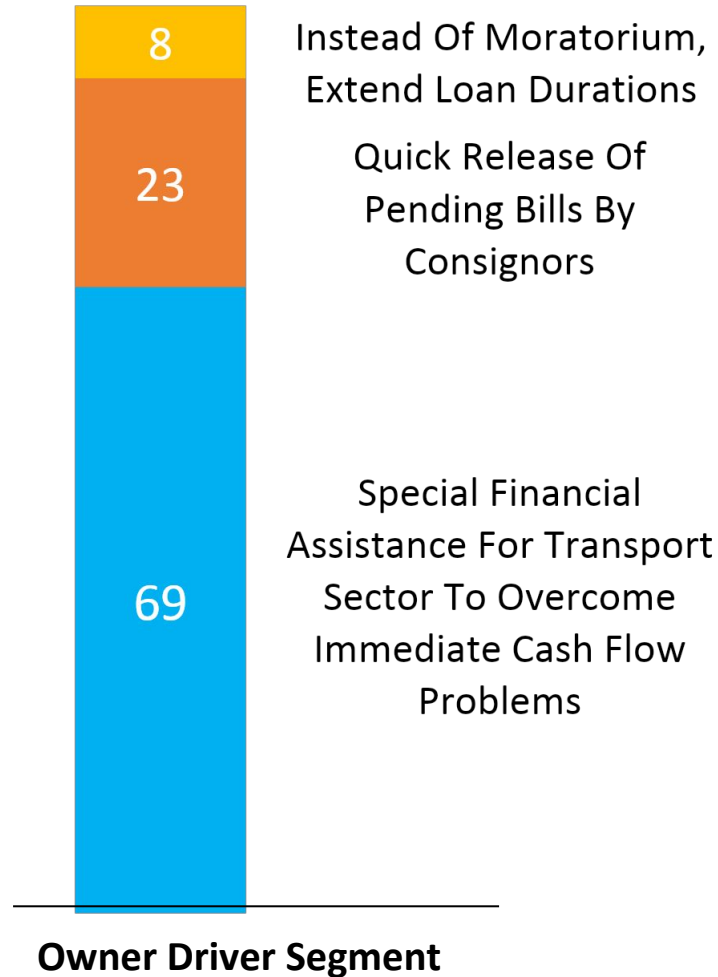
Bar graph representation of Q8(c), (d) & (e) responses



Q8(f) Major prerequisites for a smooth restart Owner Driver

Major prerequisites for a smooth restart	Percent Consenting Fleet Owners
Special Financial Assistance for Transport sector to overcome immediate cash flow problems	69.23
Quick release of pending bills by consignors	23.08
Instead of moratorium, extend loan durations	7.69
Total	100.00

Q23 Major Pre-requisite for a smooth restart



Q 9

Your expectations of Post Epidemic economic scenario
Tick only THREE most important ones

Q9(a) Your expectations of Post Epidemic economic scenario

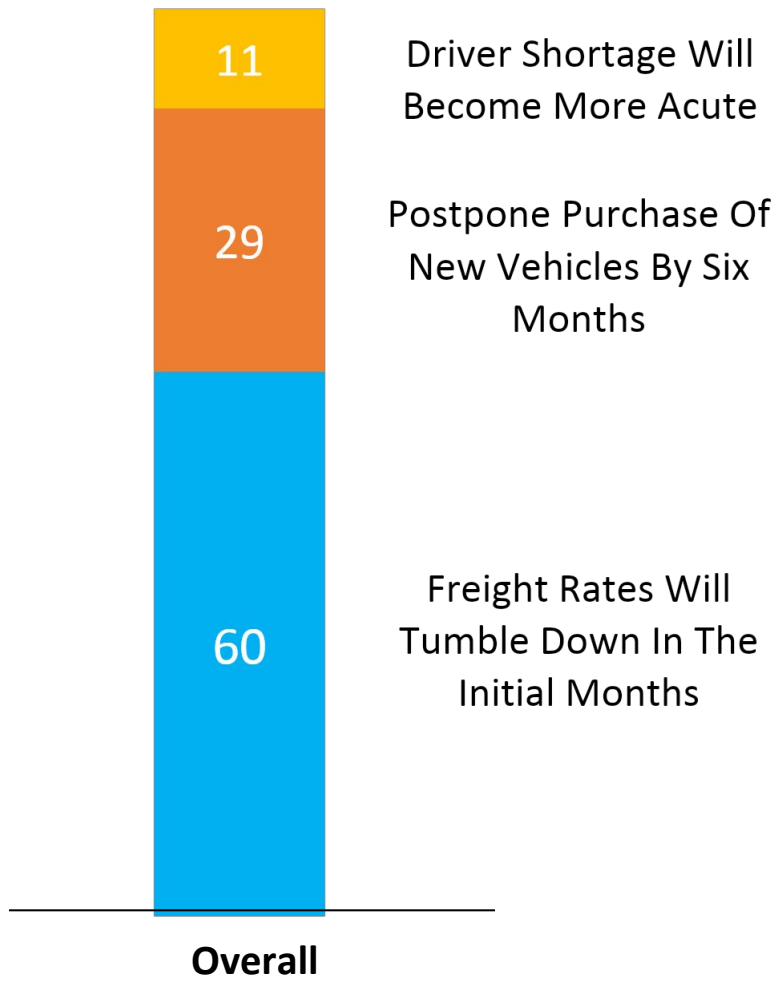
	More than 100 Trucks	6 to 99 Trucks	2 to 5 Trucks	Owner Driver (One Truck)	All India
Freight rates will tumble down in the initial months	58%	56%	55%	69%	59%
Postpone purchase of new vehicles by six months	65%	58%	57%	44%	56%
There will be short term depression but recovery will also be quick	46%	45%	61%	50%	49%
Quite a few companies from small fleet owners & Owner Driver Segment will go out of business	48%	52%	39%	46%	47%
Special provisions for MSME sector as most transporters belong to MSME	42%	43%	43%	46%	43%
Driver shortage will become more acute	40%	38%	39%	33%	37%

Multiple responses

Q9(b) Major anticipation & coping strategies on overall Basis

Major Anticipation & Coping Strategies	Percent Consenting Fleet Owners
Freight rates will tumble down in the initial months	60.25
Postpone purchase of new vehicles by six months	29.10
Driver shortage will become more acute	10.66
Total	100.00

Bar graph representation of Q9(b) responses



Q9(c) Most important anticipation & coping strategies for fleet size 100 trucks & above

Major Anticipation & Coping Strategies	Percent Consenting Fleet Owners
Postpone purchase of new vehicles by six months	64.58
Freight rates will tumble down in the initial months	31.25
Special provisions for MSME sector as most transporters belong to MSME	4.17
Total	100.00

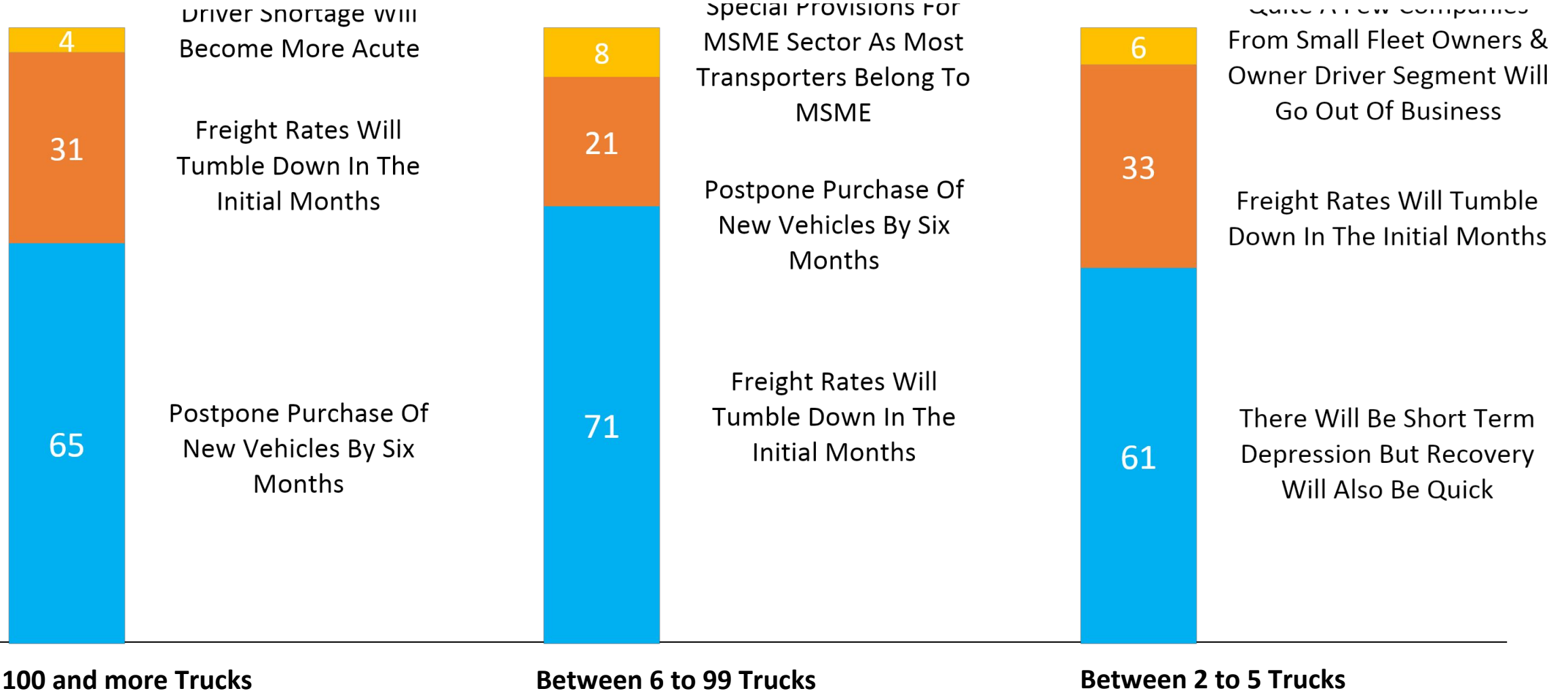
**Q9(d) Major anticipation & coping strategies
for fleet Size 6 to 99 Trucks**

Major Anticipation & Coping Strategies	Percent Consenting Fleet Owners
Freight rates will tumble down in the initial months	70.83
Postpone purchase of new vehicles by six months	20.83
Special provisions for MSME sector as most transporters belong to MSME	8.33
Total	100.00

Q9(e) Major anticipation & coping strategies for fleet size 2 to 5 trucks

Major Anticipation & Coping Strategies	Percent Consenting Fleet Owners
There will be short term depression, but recovery will also be quick	61.22
Freight rates will tumble down in the initial months	32.65
Quite a few companies from small fleet owners & Owner Driver Segment will go out of business	6.12
Total	100.00

Bar graph representation of Q9(c), (b) & (d)



Q9(f) Major anticipation & coping strategies for owner driver

Most Important Anticipation & Coping Strategies	Percent Consenting Fleet Owners
Freight rates will tumble down in the initial months	71.15
There will be short term depression, but recovery will also be quick	23.08
Special provisions for MSME sector as most transporters belong to MSME	5.77
Total	100.00

Bar graph representation of Q9(f) responses

