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Adapting to a new reality: Trends in businesses' needs for personal protective equipment since December 2020

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Adapting to a new reality: Trends in businesses' needs for personal protective equipment since December 2020

by **Patrick Ndolo**

The onset of the COVID-19 pandemic created an unprecedented demand for personal protective equipment (PPE) across the globe which has led to uncertainty about supplies and inventories of PPE. Various public health guidelines which restricted operations of businesses were implemented across the country to curb the spread of COVID-19. In February 2021, to allow for the reopening of the economy, some of the implemented restrictions were alleviated across the country in varying degrees. The Personal Protective Equipment Survey (PPES) provides a portrait of demand and supply of PPE in Canada allowing decision makers to respond to the evolving needs of Canadian businesses. This article examines the evolution of private sector businesses' demand and supply of PPE using data from the February 2021 PPES.

Demand for PPE among businesses that needed, or expected to need, PPE held-steady in February. Considerably more businesses are less concerned about shortages in PPE which are essential to them, with businesses in Quebec having the least concern. Among the businesses expecting a shortage of PPE, insufficient products or equipment available from the suppliers remain the leading cause for concern with regards to shortages in any one type of PPE that they require.

Businesses' needs for personal protective equipment unchanged since December 2020

Just under two-thirds (66.1%) of businesses reported that they needed, or expected to need, PPE in order to operate in accordance with COVID-19 related public health guidelines. This is roughly unchanged from December 2020 (66.9%).

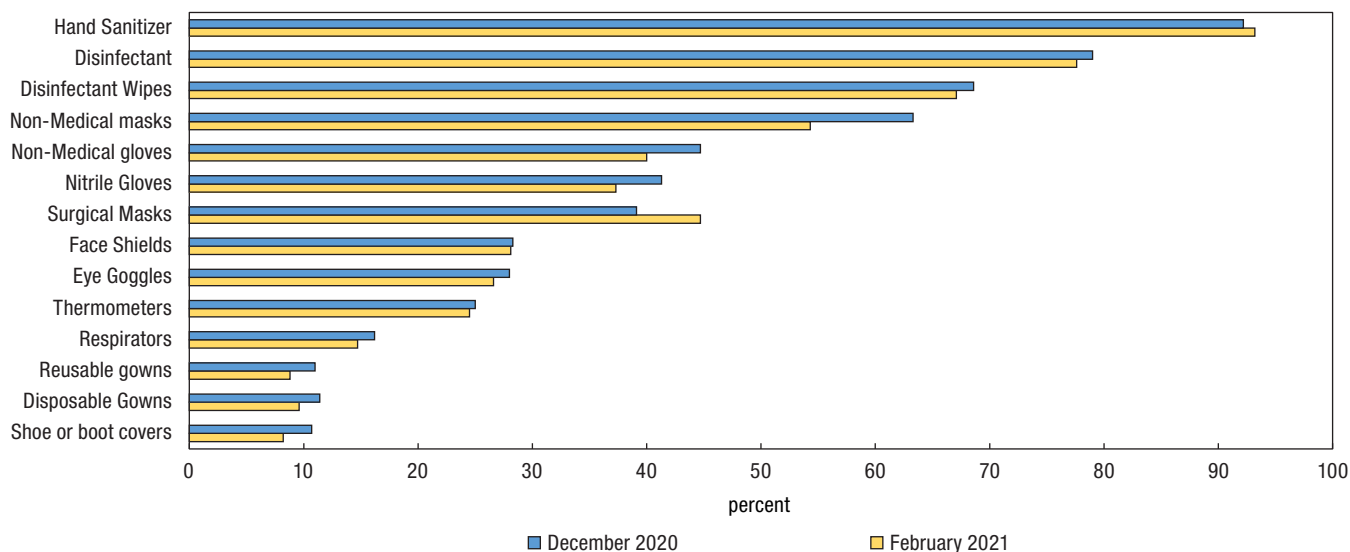
Different sectors of the economy continue to have varying demands for PPE. Businesses in the services-producing sector were more likely to demand PPE with more than three-quarters of businesses in educational services (92.1%), health care and social assistance (84.3%), retail trade (84.0%), and accommodation and food services (79.5%) demanding PPE compared to less than half of businesses in professional, scientific and technical services (41.9%) and agriculture, forestry, fishing and hunting (27.7%).

Just under three-quarters (74.6%) of businesses that indicated needing PPE required at least 4 of the 14 types of PPE that are covered in this survey.¹ Similar to December 2020, businesses were more likely to need PPE that is related to cleaning and disinfecting surfaces, as well as face and hand coverings. Except for surgical masks, whose demand has been increasing since October 2020, there was little change in the distribution of most demanded PPE among businesses that need PPE with hand sanitizer (93.2%), disinfectant (77.6%), disinfectant wipes (67.1%), non-medical masks (cloth masks, reusable masks) (54.3%), surgical masks (44.7%), and non-medical-gloves (vinyl gloves, plastic gloves) (40.0%) being most demanded by businesses –see chart 1. This is expected as more than 6 in 10 businesses indicate that they are actively implementing cleaning practices and providing disinfectants to their employees, and in some cases their clients to operate in accordance with the public health guidelines aimed at curbing the spread of COVID-19 (Statistics Canada, 2021a).

1. These include disinfectant, disinfectant wipes, disposable gowns, eye goggles, face shields, hand sanitizer, nitrile gloves, non-medical gloves, non-medical masks, respirators, reusable gowns, shoe or boot covers, surgical masks, and thermometers.



Chart 1
Most demanded PPE products by businesses



Note: Each bar gives the proportion of PPE most demanded by businesses.

Source: Statistics Canada, Personal Protective Equipment Survey, December 2020, February 2021.

Businesses are less concerned about shortages of personal protective equipment

A little over four-fifths (80.1%) of businesses that require PPE to operate indicated that they did not expect any shortages in any one type of PPE that they required within the next three months.

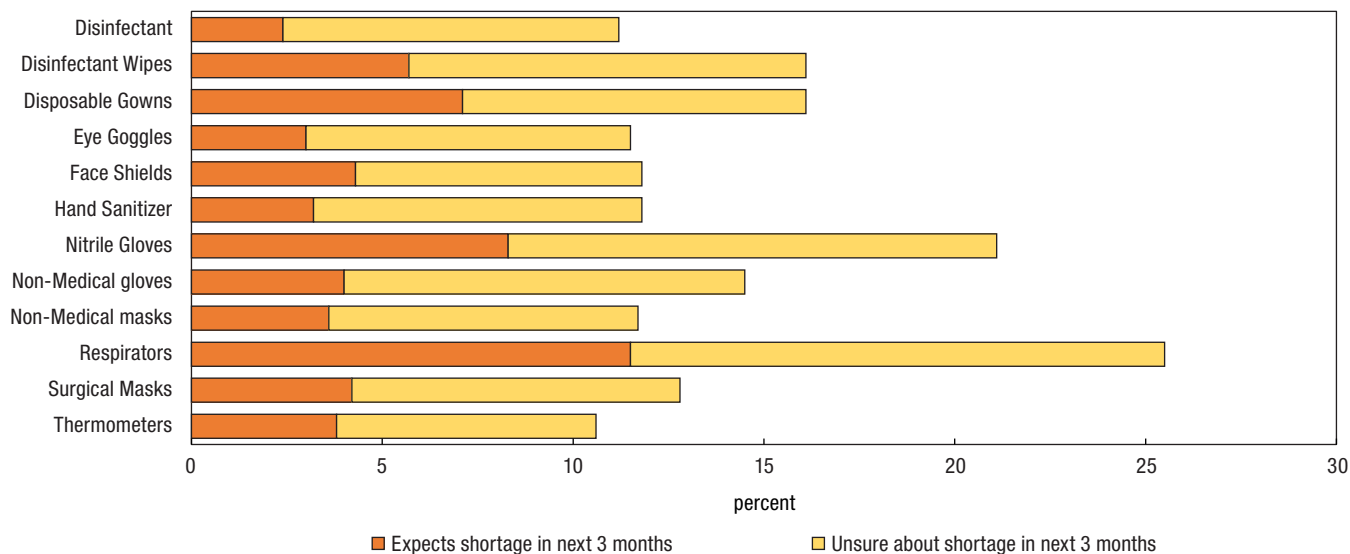
Just under one-fifth (19.9%) of businesses that reported requiring PPE to operate in accordance with the public health guidelines had concerns about potential shortages of PPE within the next three months.² This represents a 10.9-percentage point decline in the number of businesses expecting a shortage in PPE from December 2020. This is the third consecutive decline in the number of businesses expecting PPE shortages and is the lowest point recorded since July 2020. The decline in PPE shortage concerns among businesses might suggest that suppliers of PPE are now better able to meet much of the demand for PPE and more businesses have enough PPE stockpiles in their inventories.

Concerns about PPE shortages vary by sector and type of PPE. Businesses in private health care and social assistance were more likely (19.4%) to expect a shortage in any one type of PPE that they require than businesses in retail trade (4.5%). This is consistent with the results from December 2020. Also, similar to December 2020, the availability of some PPE items is more uncertain than others. Businesses indicated being more likely to expect a shortage in respirators (11.5%) than disinfectant (2.4%) – see chart 2.

2. Some businesses both expect a shortage for some types of PPE and are unsure whether they will experience a shortage for other types of PPE. These businesses are counted as expecting a shortage.



Chart 2
Availability of certain products is more uncertain than others



Note: Values for reusable gowns and shoe/boot covers are suppressed.
Source: Statistics Canada, Personal Protective Equipment Survey, February 2021.

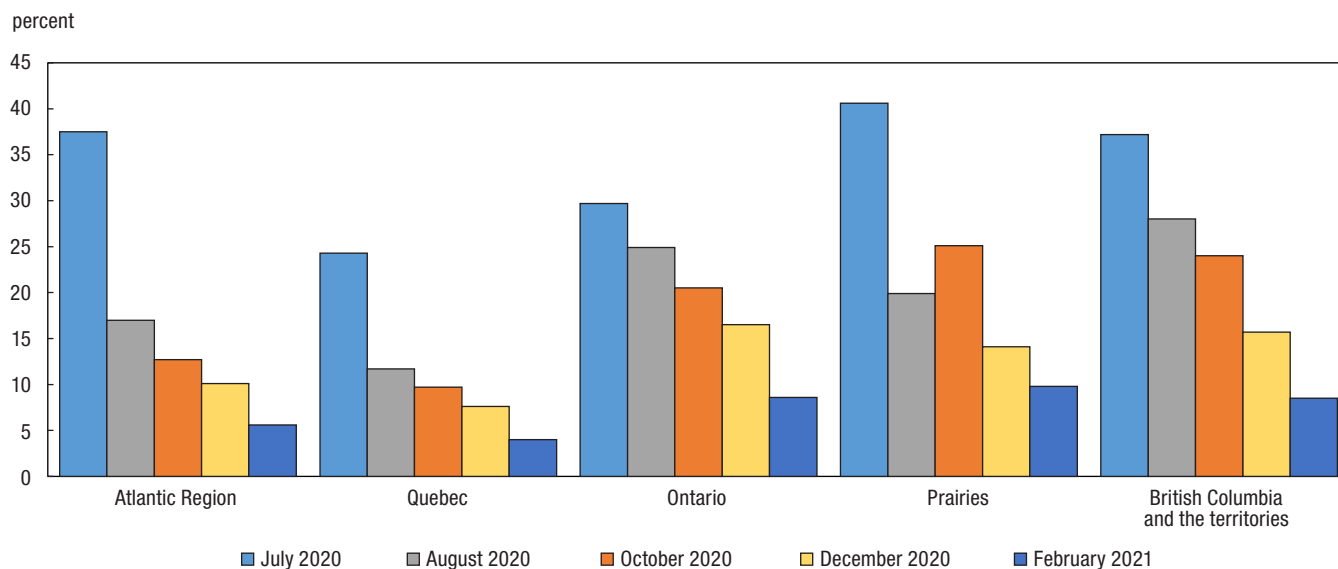
Businesses' PPE shortage expectations continue to decline across the provinces

The February PPES results show that there continues to be some disparity in businesses' demand for PPE across the country. However, compared to December 2020, the variation in demand for PPE between provinces is less polarized, with businesses in British Columbia and the territories being more likely to demand PPE (68.8%) than businesses in Quebec (58.7%).

Similar to December 2020, we continue to see a decline in PPE shortage expectations among businesses that indicated expecting a shortage in any one type of PPE that they require within the next three months. Businesses in Quebec are still the least likely to expect a shortage in any one type of PPE that they require—see chart 3.



Chart 3
Proportion of businesses expecting a shortage in at least one PPE



Note: Each bar gives the proportion of businesses that expect a shortage in the next three months for at least one type of PPE that they require, among businesses that need PPE.
Source: Statistics Canada, Personal Protective Equipment Survey, July 2020, August 2020, October 2020, December 2020, February 2021.

Share of businesses involved in the manufacturing or distribution of personal protective equipment declines slightly

Just under one-tenth of businesses (8.4%) in the manufacturing, retail trade, and wholesale trade were involved in the manufacturing and distribution of PPE in February. This represents a 1.6-percentage point decline compared with December 2020.

Small businesses less likely to need personal protective equipment than larger counterparts

The most recent data on the impact of COVID-19 on businesses indicates that small businesses continue to be disproportionately negatively impacted by the ongoing pandemic-related restrictions, with small businesses being more likely to experience significant decreases in profitability and sales (Statistics Canada, 2021b). These effects generated concerns that small businesses might not have the financial capacity to acquire personal protective equipment compared to larger businesses. However, data collected in the PPES show that small businesses were less likely to need PPE than medium or large businesses, with just under two thirds (65.9%) of small businesses requiring PPE to operate, compared with close to four-fifths (78.3%) of medium and large businesses. These February 2021 results are consistent with PPES findings from December and October 2020. Also similar to December 2020, insufficient products or equipment available from suppliers remains the leading cause for PPE shortage expectations among small or medium to large businesses, as opposed to insufficient funds.



Data sources

Data for this analysis come from the PPES for February 2021. This voluntary survey aims to collect information on private-sector businesses' supply, demand, and inventories of PPE. Along with the results of this analysis, these data are used to help the federal government model usage and inventories of PPE in Canada, and forecast potential shortfalls in these items. Results from the February iteration were based on responses from 5,431 businesses operating in Canada.

References

Statistics Canada. (2021a). [Impact of COVID-19 on food services and drinking places, first quarter of 2021](https://www150.statcan.gc.ca/n1/pub/45-28-0001/2021001/article/00010-eng.htm), March 2021. Statistics Canada Catalogue no. 45-28-0001. Retrieved from <https://www150.statcan.gc.ca/n1/pub/45-28-0001/2021001/article/00010-eng.htm>.

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