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Navigating the third wave: Trends in businesses' needs for personal protective equipment since February 2021

by Patrick Ndolo

Release date: July 16, 2021

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Published by authority of the Minister responsible for Statistics Canada

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Navigating the third wave: Trends in businesses' needs for personal protective equipment since February 2021

by **Patrick Ndolo**

The COVID-19 pandemic created an unprecedented demand for personal protective equipment (PPE) across the globe which led to uncertainty about supplies and inventories of PPE. A surge in COVID-19 cases in late spring of 2021 led to the adoption and tightening of public health guidelines which restricted the operations of businesses in order to curb further spread of the virus. Complementing the public health restrictions in fighting the spread of COVID-19 were increases in vaccination rates across the country following the approval of the first vaccine in early December 2020 by Health Canada. By May 31, 2021, more than half of the Canadian population had been vaccinated with at least one dose which helped moderate the effects of the third wave (Public Health Agency of Canada, 2021; Favaro et al., 2021).

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 May 2021 Personal Protective Equipment Survey (PPES).

Demand for PPE among businesses that needed, or expected to need, PPE slightly declined in May compared to February 2021, as most businesses continue to use and need PPE. The share of businesses that were involved in the manufacturing or distribution of PPE also slightly declined in May. The number of businesses; however, that had concerns about shortages in PPE which are essential for them to operate in accordance with the public health guidelines remained relatively the same. Insufficient products or equipment available from suppliers remains the leading cause of shortage expectations of required PPE among businesses.

Demand for personal protective equipment among businesses at lowest level since July 2020

Just over three-fifths (60.6%) of businesses reported that they needed, or expected to need, PPE to operate in accordance with COVID-19 related public health guidelines. This is a reduction of 5.5-percentage points from February 2021, and is the lowest recorded demand for PPE among businesses since July 2020.

Demand for PPE among businesses in different sectors followed a similar distribution to that observed in February 2021. Businesses in educational services (87.3%), health care and social assistance (82.1%), accommodation and food services (82.0%), manufacturing (78.1%), and retail trade (74.2%) had the highest demand for PPE compared to businesses in professional, scientific and technical services (41.6%) and agriculture, forestry, fishing and hunting (35.3%).

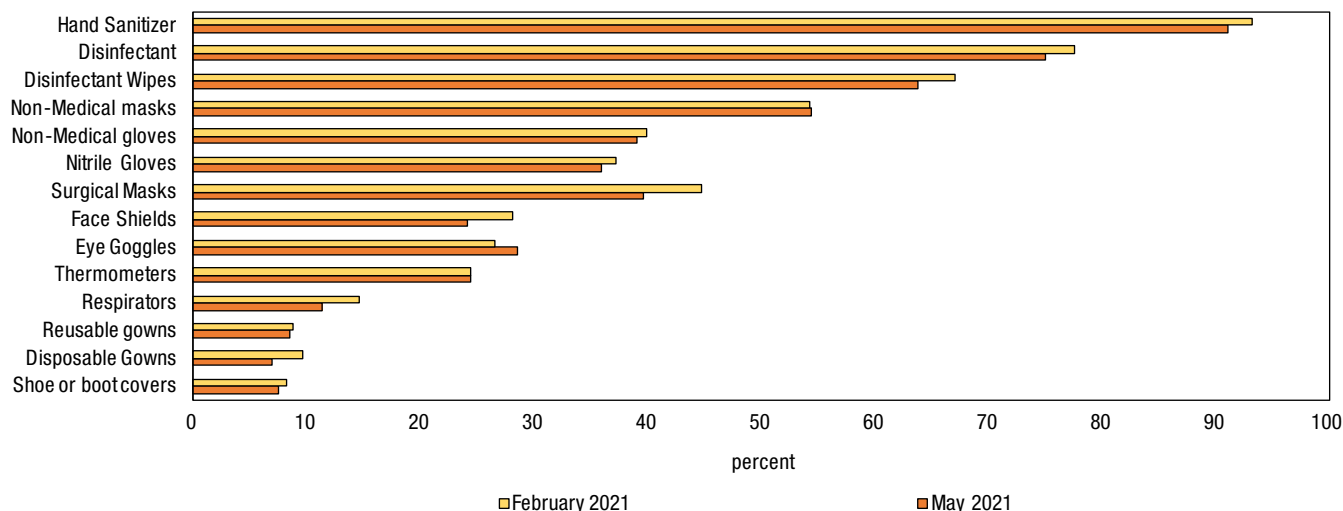
Different types of PPE are required by businesses in order to operate safely. In May 2021, 7 out of 10 businesses (70.8%) that reported needing PPE required 4 out of the 14 types of PPE that are covered in the PPE survey.¹ Items of PPE that are related to cleaning and disinfecting surfaces, as well as face and hand coverings continue to be the most demanded by businesses – see chart 1. The distribution of PPE items most demanded by businesses has

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.



remained roughly constant since July 2020 as businesses continue to implement cleaning practices and provide disinfectants to their employees and their clients or patients in order to operate in accordance with the public health guidelines aimed at curbing the spread of COVID-19.

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, February 2021, May 2021.

Concerns about Personal Protective Equipment shortages among businesses relatively unchanged

Under one-fifth (19.6%) of businesses that reported requiring at least one type of 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 0.3-percentage point decline in the number of businesses expecting a shortage in PPE from February 2021, marking four consecutive iterations of decline. Steadying stockpiles of PPE inventory among businesses as well as the recent decline in employment may be driving the decrease in PPE shortage expectations among businesses (Statistics Canada, 2021).

Over four-fifths (80.4%) 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. These results are consistent with data reported in February 2021.

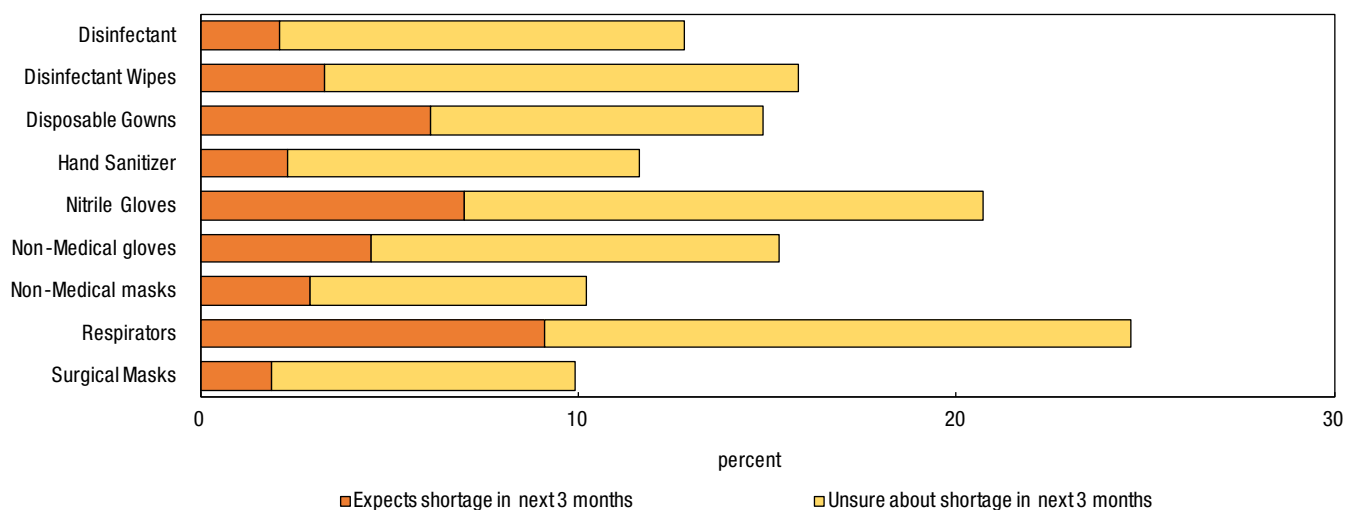
2. Some businesses both expect a shortage for some types of PPE and are unsure whether they will experience a shortage for other types of PPE. These businesses are counted as expecting a shortage.



Among the businesses concerned about shortages of PPE, those in health care and social assistance were more likely (16.6%) to expect a shortage in any one type of PPE that they require than businesses in retail trade (6.5%). This is consistent with the results from February 2021. Also, similar to the results from February 2021, businesses are more likely to expect a shortage in respirators (9.1%) than surgical masks (1.9%) – see chart 2.

With regards to small businesses, the May 2021 PPES results show that PPE shortage is not a concern with just over three fifth (60.3%) of small businesses reporting that they needed, or expected to need, PPE compared to over three quarters (77.8%) of medium or large businesses. These results are consistent with the PPES findings from February 2021.

Chart 2
Availability of certain products is more uncertain than others



Note: Values for eye goggles, face shields, reusable gowns, shoe or boot covers and thermometers are suppressed.
Source: Statistics Canada, Personal Protective Equipment Survey, May 2021.

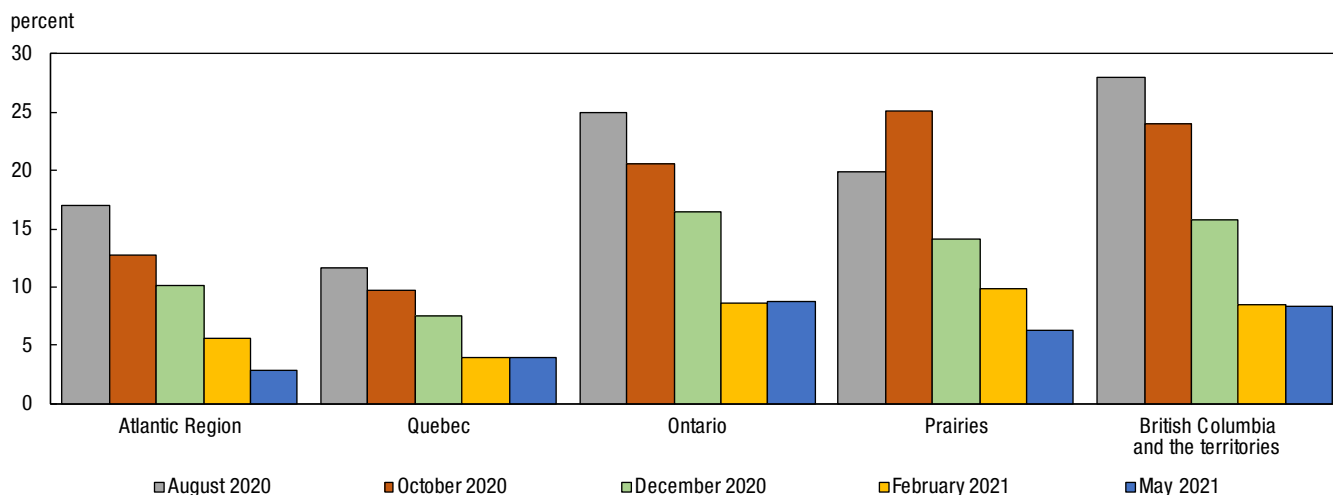
Demand and shortage expectation for Personal Protective Equipment vary across the provinces

There continues to be some fluctuation in demand for PPE among businesses across the country. The May 2021 PPES results show that businesses in British Columbia and the territories and the Atlantic region were more likely to demand PPE (61.3%) than businesses in Quebec (56.7%). Similar to February 2021, the polarity of the variance in PPE demand across the country continues to decline.

For the most part, businesses' expectation of potential shortages in any one type of PPE that they require within the next three months has been steadily declining across the provinces since July 2020. This trend has been consistent across all the regions except for Quebec and Ontario—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, August 2020, October 2020, December 2020, February 2021, May 2021.

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

Nearly one-in-twenty (4.6%) businesses in the manufacturing, retail trade, and wholesale trade sector were involved in the manufacturing or distribution of PPE in May. This represents a 3.8-percentage point decline compared with February 2021.



Data sources

Data for this analysis come from the PPES for May 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 May iteration were based on responses from 4,886 businesses operating in Canada.

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