



Intelligence Briefing

Driver Shortage Global Report 2022: Summary

Understanding the impact of driver
shortages in the industry

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IRU Intelligence Briefings explore facts, figures and views on a range of topics in road transport, in an easy-to-read format.

This report is a summary extract of the full 2022 driver shortage survey report and data sets, available for IRU members.

Driver shortage is a chronic and serious global issue

Shortages affect passenger and goods transport operations, impacting the mobility of people and, in particular, logistics and global supply chains.

The impact of driver shortages is not only felt by transport operators and in the services they provide.

Knock-on effects ripple quickly throughout supply chains, affecting consumers and businesses.

Executive summary

Over 2.6 million truck driver jobs were unfilled in 2021 in surveyed countries¹, and the shortage is set to soar in 2022.

Truck driver shortage has increased in 2021 in all regions surveyed except Eurasia. It was most acute in Eurasia and Turkey, where 18% and 15% of driver positions were, respectively, unfilled in 2021. Mexico and Argentina were the least affected with 8.6% of truck driver positions unfilled.

Transport companies forecast truck driver shortages to continue increasing in 2022.

The only exceptions will be China and Argentina, where they will remain virtually stable. This will be

driven by continued economic recovery (4.2% global GDP growth forecast for 2022, even if economic growth will slow compared to 2021), persistent road freight supply and demand tensions, and a contraction of the available driver workforce (due to demographic factors as well as difficult working conditions and training and qualification challenges).

Eurasian companies expect that 26% of truck driver positions will remain unfilled in 2022. This exceeds 2019 levels (24%), while the shortfall is expected to reach 14% in Europe, 11% in Mexico and 18% in Turkey.

Globally, truck driver shortage remains a structural problem, and is expected to be a factor limiting road freight industry growth in 2022.

1. In the scope of countries surveyed: United States, Mexico, Argentina, Europe (Spain, Italy, France, UK, Ireland, Germany, Poland, Romania, Belgium, Netherlands), Eurasia (Russia, Uzbekistan, Ukraine), Turkey, Iran, China

Bus and coach driver shortage will steadily rise in 2021 and 2022, along with demand recovery.

Road passenger transport demand has started to recover as vaccination rates grow, number of COVID cases decrease and mobility restrictions ease.

Urban and short-distance road passenger transport have been the least impacted segments and the ones where recovery is and will be quicker.

On the other hand, longer-distance services will take longer to recover; tourism being the sector most impacted by the pandemic.

However, travel and agency services revenue growth was already positive in 2021 (4%), and it is expected to accelerate in 2022 (10%), even if revenues will remain far from 2019 levels (-20%).

Bus and coach driver shortage is slowly but steadily increasing, even if it will still be far from pre-pandemic levels in 2022.

In Europe, 7% of bus and coach driver positions were unfilled in 2021, and bus and coach companies estimate that shortages will further increase in 2022 to reach 8% of unfilled bus and coach positions.

In all regions, less than 3% of truck drivers are women, except in China (5%) and in the United States (8%).

The proportion of women drivers remains very low in all regions, especially compared to the overall transportation industry benchmark: over 8% of transportation employees are women overall, and even over 20% in some regions (Eurasia, Europe and United States).

In the bus and coach segment, even if the share of women drivers was a bit higher in Europe compared to the freight segment, women

representation fell from 16% in 2020 to 12% in 2021.

The entire transport industry is struggling to attract young people.

There were encouraging signs in Mexico and China, where 19% and 17% of truck drivers, respectively, were below 25 years old.

Elsewhere, the share of young drivers was below 7%. The situation is particularly severe in the passenger segment, where the share was below 3% in both Europe and China.

The main reasons for these low

numbers are the ageing population, the minimum legal age to access the profession, which goes up to 21 and even 26 years old in some countries, together with the attractiveness of the profession.

The pandemic has also negatively impacted the number of new young drivers accessing the profession in many countries.

Given the high proportion of older drivers approaching retirement, the shortage of drivers will continue to rise dangerously if no action is taken.

Only China's freight transport sector fares better in this respect, with a share of young drivers that is higher than the proportion of drivers over the age of 55.

Over 50 million people were unemployed in 2020 in the countries and regions analysed, representing an available workforce that could largely cover the existing gap.

Additional measures to make the profession more attractive could help to reduce unemployment, especially youth unemployment, which is well over 30% in some countries.

Operators (passenger and freight) from most regions see the lack of qualified drivers as the main cause for the driver shortage.

Freight companies also agree that in order to address the shortage of drivers, governments should prioritise measures to improve working conditions (improve parking facilities, treatment of drivers at delivery sites, etc.).

In the case of the passenger segment, companies consider that measures to address the shortage should focus on facilitating access to the profession.

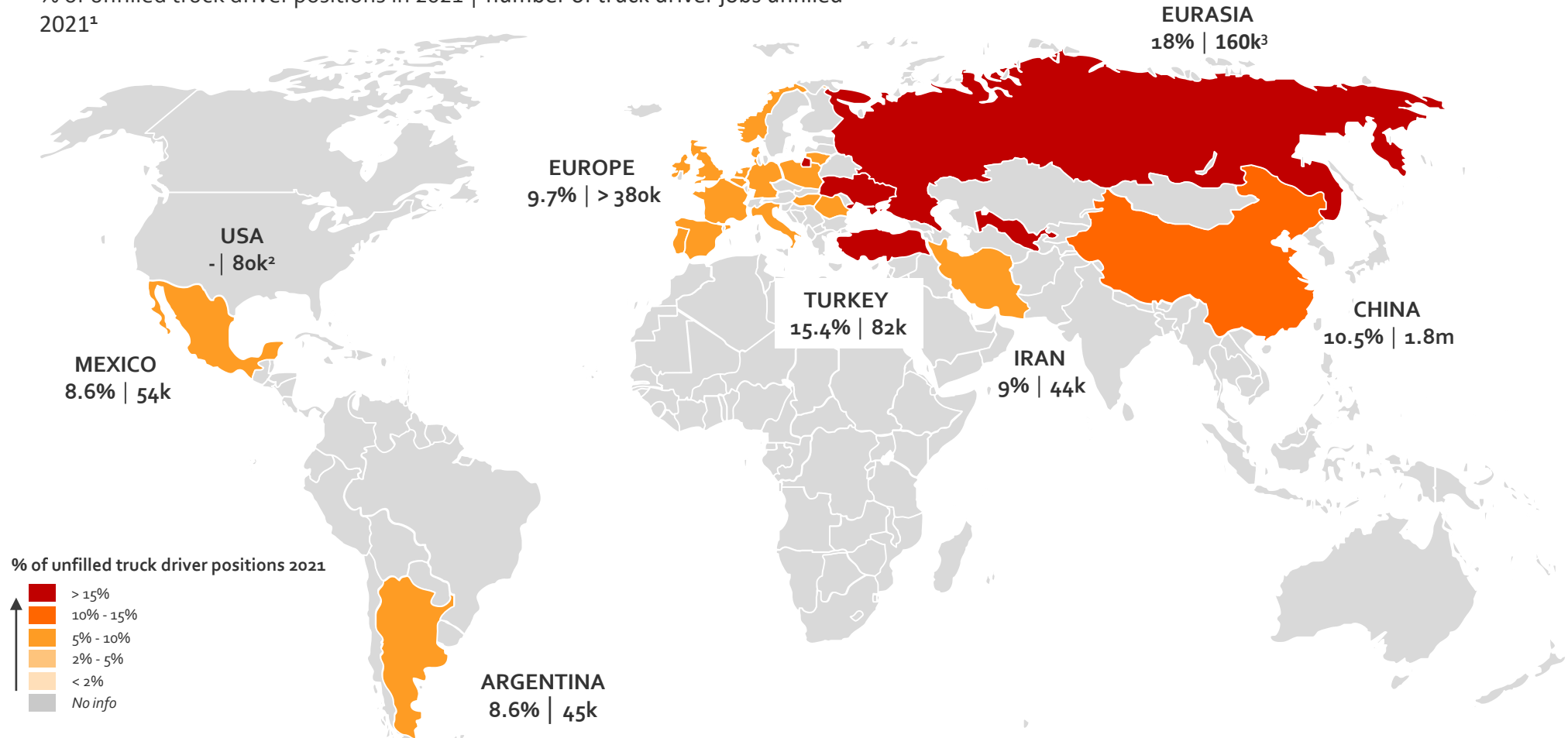
Truck driver shortage

Over 2.6 million truck driver jobs were unfilled in 2021 in surveyed countries.

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Increased truck driver shortages in 2021 across all regions

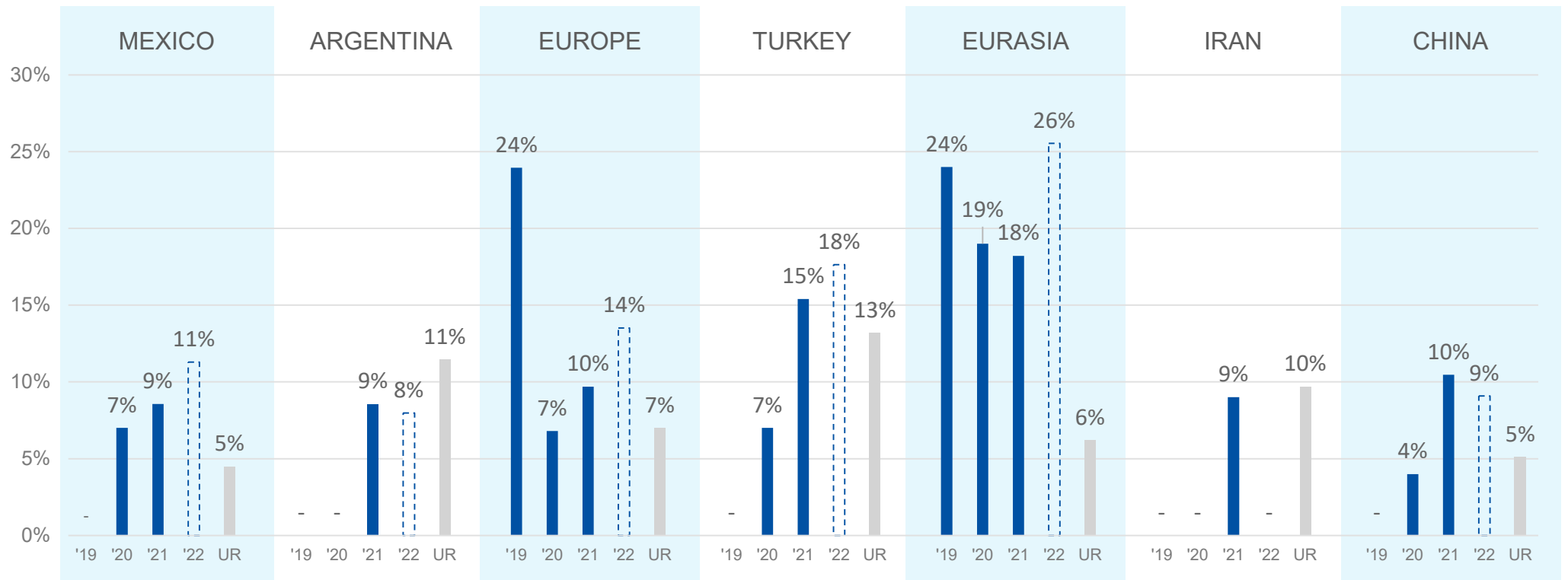
% of unfilled truck driver positions in 2021 | number of truck driver jobs unfilled
2021¹



Source: IRU survey 2021 and national road transport associations; 1. Unfilled truck driver jobs calculated based on the total number of truck drivers in each country, and the share of unfilled positions reported by road freight transport companies' answers (more details in methodology); 2. For USA, showing number of truck drivers missing (estimated driver demand minus driver supply, source ATA 2021) instead of number of truck driver jobs unfilled (average % of driver positions unfilled out of total drivers needed for companies surveyed); 3. Estimation based on number of trucks and share of trucks reported to be stopped due to a lack of drivers (RG.RU)

Truck driver shortages continue to grow, moving back to pre-pandemic levels in Europe and Eurasia

% of unfilled truck driver positions 2019-2022 (FC)¹, unemployment rate (UR) 2020²



1. IRU survey 2021, FC = forecast (for 2022); 2. Eurostat (for Europe, EU-27 unemployment) and ILO 2020 (except China – urban unemployment rate 2021, China’s National Bureau of Statistics)

Increasing shortages despite wage increases and available workforce

In general, we observe an increase of the share of unfilled truck driver positions in 2021 across all regions (except Eurasia), which is expected to rise further in 2022 (except in Argentina and China, where it will remain virtually stable). In Eurasia, the shortage of drivers will exceed pre-pandemic levels, with over 25% of truck driver positions being unfilled.

This is the result of increased demand expected for 2022, as well as the ageing of the truck driver population, which is not being replaced with new entrants.

Over 50 million people were unemployed in 2020 in the countries and regions analysed (unemployment rate was over 10% in some of them), **representing an available workforce that could largely cover the existing gap.** This reveals the lack of attractiveness of the driver profession, and highlights that any measures to promote the driver profession will additionally help to reduce unemployment.

To remain attractive employers and keep trucks moving, companies have increased driver wages in 2021,

notably in Europe (in the UK, for instance, driver gross pay surged 18% in the nine months to October 2021) and the United States (according to ATA, the industry is raising pay at five times the historic average). This trend is expected to continue in 2022.

However, it does not appear that these wage increases have attracted more professionals to the industry. It may be even exacerbating the shortage, as there are companies reporting that many drivers are using larger paychecks to cut down on their driving and spend more time at home¹.

Sources : IHS Markit, ILO, ATA (American Trucking association), IRU. 1. CNN Business, Freightwaves, Truckinginfo

Gender representation

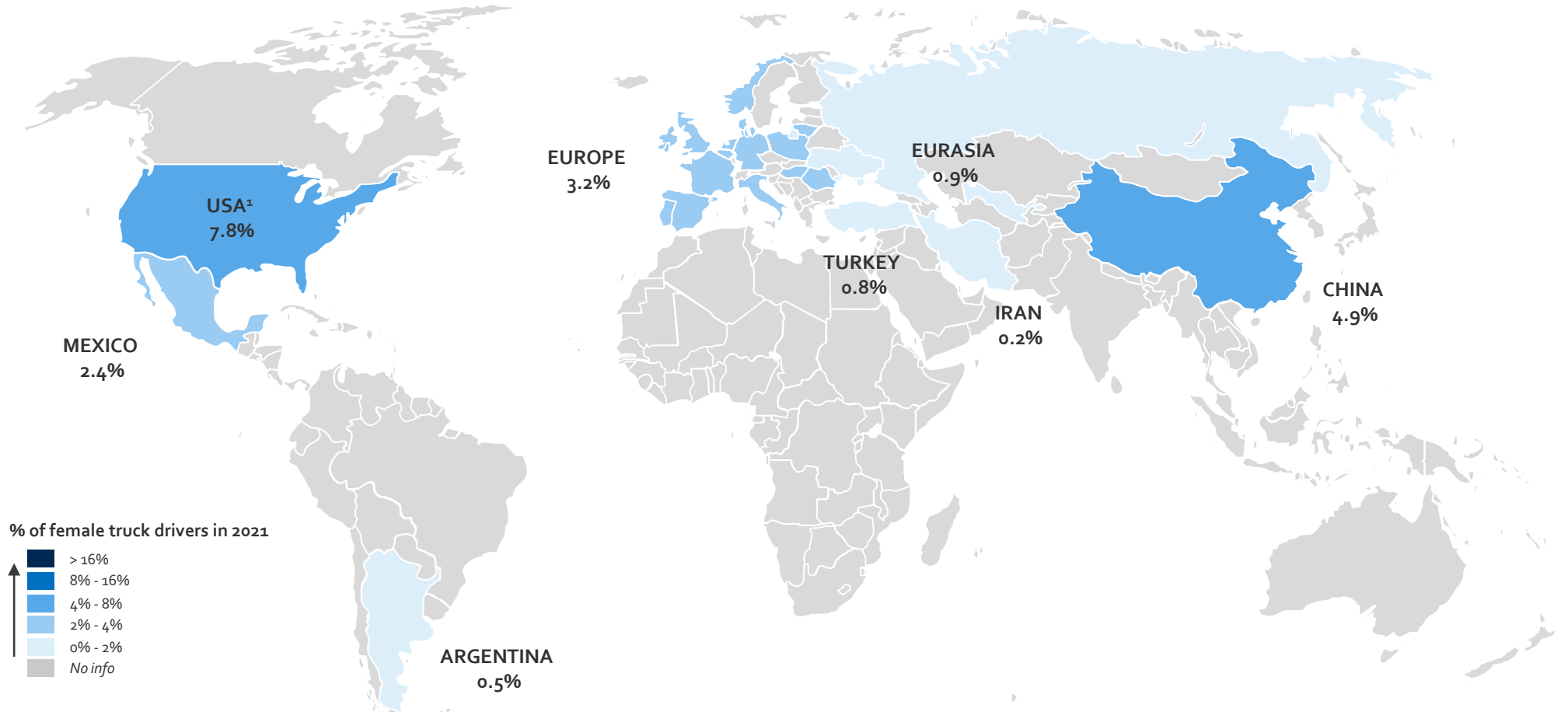
Across all regions analysed, less than 3% of truck drivers are women, except in China (5%) and the United States (8%).

The trucking industry is lagging behind the overall transportation industry in terms of women representation, even if the latter is also struggling to attract women employees.

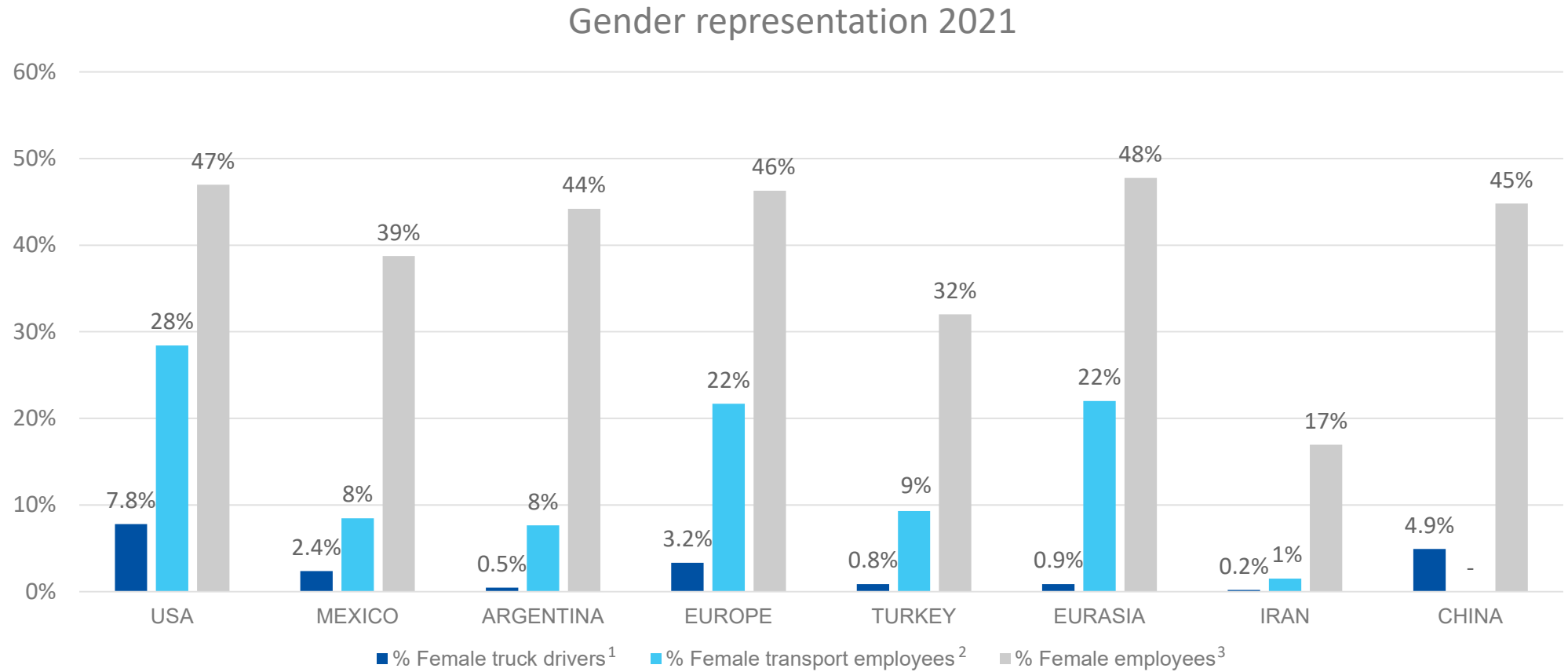


Very few female truck drivers accross all regions

% of female truck drivers in 2021



Female truck driver representation in 2021 far from transport industry benchmark



1. IRU survey 2021 (except for USA, American Trucking Association - Bureau of labor statistics, US department of Labor 2020); 2. ILO and Eurostat 2020 (Transportation and storage); 3. ILO and Eurostat 2020 (except China ILO 2010)

Less than 3% of truck drivers are women in almost all regions

The only exceptions are China (4.9% of women) and United States (7.8%).

Argentina (0.5%), Turkey (0.8%) and Iran (0.2%) show the lowest shares of women among their truck driver population. In the case of Turkey and Iran, women participate to a lesser extent in the labour market (women only account for 32% of the active population in Turkey, and 17% in Iran).

The whole transportation industry struggles to attract women globally.

Less than 10% of employees are women, except in Europe (22%), Eurasia (22%) and United States (28%).

However, the trucking industry lags behind the transportation industry in terms of women representation across all regions.

The lack of secure infrastructure, the treatment of drivers at delivery site, long periods away from home and the poor image of the profession are some of the reasons explaining the low representation of women.

Age distribution

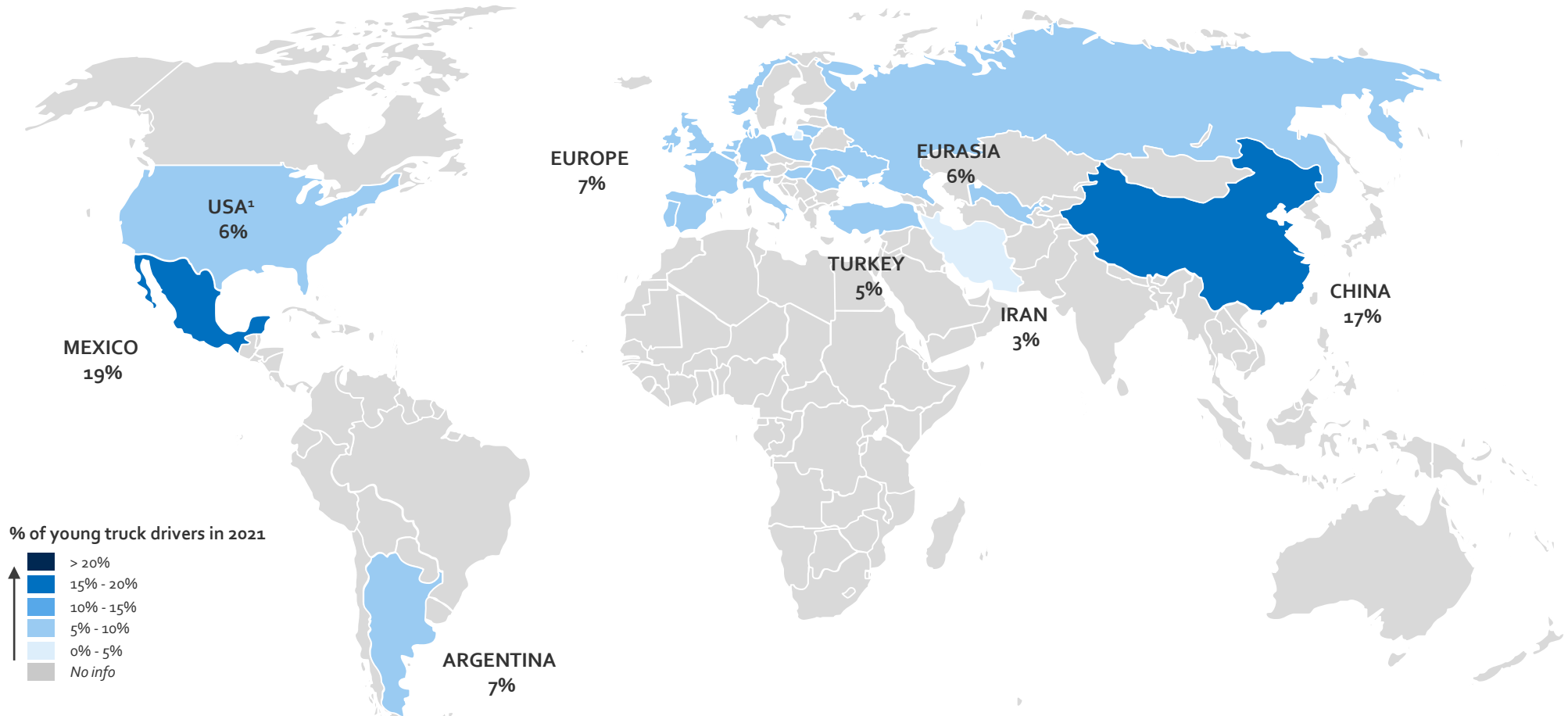
The proportion of people below 25 years old in the truck driver population remains low across almost all regions (less than 7%).

Mexico and China are the only exceptions, where 19% and 17% of young truck drivers are below 25 years old, respectively.



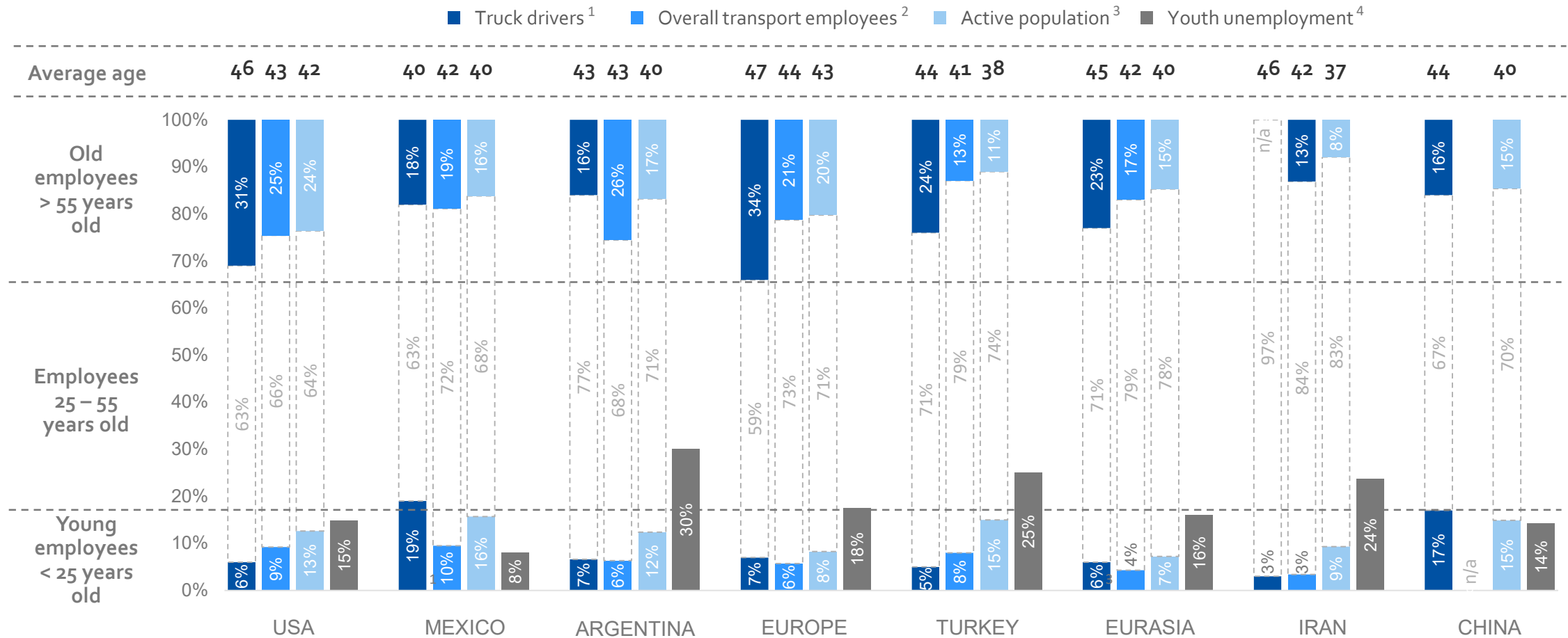
Attracting young truck drivers remains a challenge despite high youth unemployment

% of young truck drivers (< 25 years old) in 2021



Source: IRU survey 2021 except USA (Bureau of labor statistics (BLS), US department of Labor 2021, NAICS 484 Truck transportation; this category includes, additionally to "Truck drivers, heavy and tractor-trailer" occupation category, light truck or delivery services drivers, mechanics, labourers and office employees, but according to Occupational Employment Statistics, "Truck drivers, heavy and tractor-trailer" represent over 60% of all truck transportation employment.

Wide gap between young and old truck drivers



1. IRU Survey 2021 except USA (Bureau of labor statistics (BLS), US department of Labor 2021, NAICS 484 Truck transportation); 2. Eurostat and ILO 2020 (Transportation and storage); for Eurasia, Russia's; 3. Eurostat and ILO 2020 (except ILO 2010 for China, ILO 2017 for Ukraine); 4. Eurostat and ILO 2020, (except China – urban unemployment rate 2021, China's National Bureau of Statistics)

Encouraging proportion of young truck drivers in some countries

The share of young people in the truck driver population is very low in most of the countries and regions surveyed (below 7%). However, figures in Mexico and China are encouraging, with 19% and 17% of young truck drivers, respectively, which is above their corresponding transportation industry and even active population benchmarks.

One of the main reasons for the low proportion of young people is the **ageing population** (less than 13% of the overall workforce is younger than 25 years old in all regions, except Mexico, China and Turkey).

Nonetheless, the share of young truck drivers is behind the active population benchmark in all regions except

Mexico and China, and overall transportation benchmarks in some cases (USA and Turkey).

Another factor is the **minimum legal age** to access the truck driver profession, which goes up to 21 and even 24 years old in some countries (China in the case of heavy-duty tractor trailers with no full-time vocational training)¹.

Making the truck driver profession more attractive for young people could also be a means to address youth unemployment, which is well above 25% in some of the countries surveyed.

1. Until 22 April 2022, the minimum age was 20 years old for large trucks, and 20 years old for heavy-duty tractor-trailers in the case of full-time vocational driving education (24 otherwise. From 22 April 2022, the minimum age for heavy-duty tractor-trailers has been reduced to 19 years old in the case of full-time vocational training (22 years old otherwise).

High share of old truck drivers indicates larger shortages to come

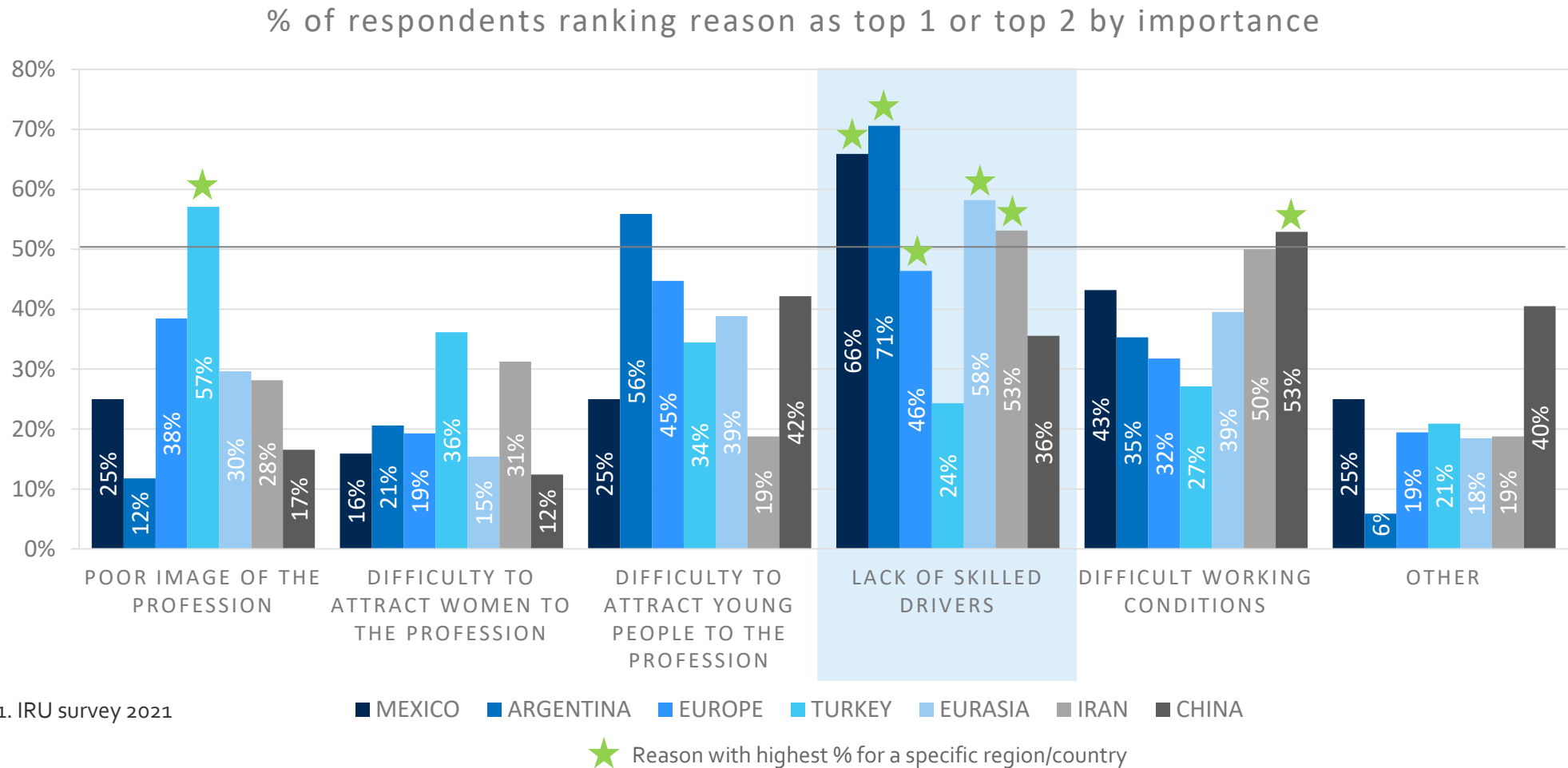
At the other end of the spectrum, we can see that, for most regions, there is a large share of older drivers above 55 years old. It is clearly higher than the overall transportation and active population benchmarks, and too large when compared to the share of young truck drivers, meaning shortages will increase in the near future as there will not be enough young drivers to cover retiring old drivers.

The most severe cases are Europe and Iran. Europe has the highest average driver age (47), and over one third of the driver population are above 55 years old. Moreover, the share of young drivers is very low (only 7% of drivers are below 25). Iran has also a high

average age (46), and the lowest share of young drivers among regions surveyed (3%).

On the other hand, Mexico and Argentina have a low share of old drivers above 55 (18% and 16%, respectively), which is aligned with the overall active population and, in the case of Mexico, accompanied by a high proportion of young truck drivers (19%).

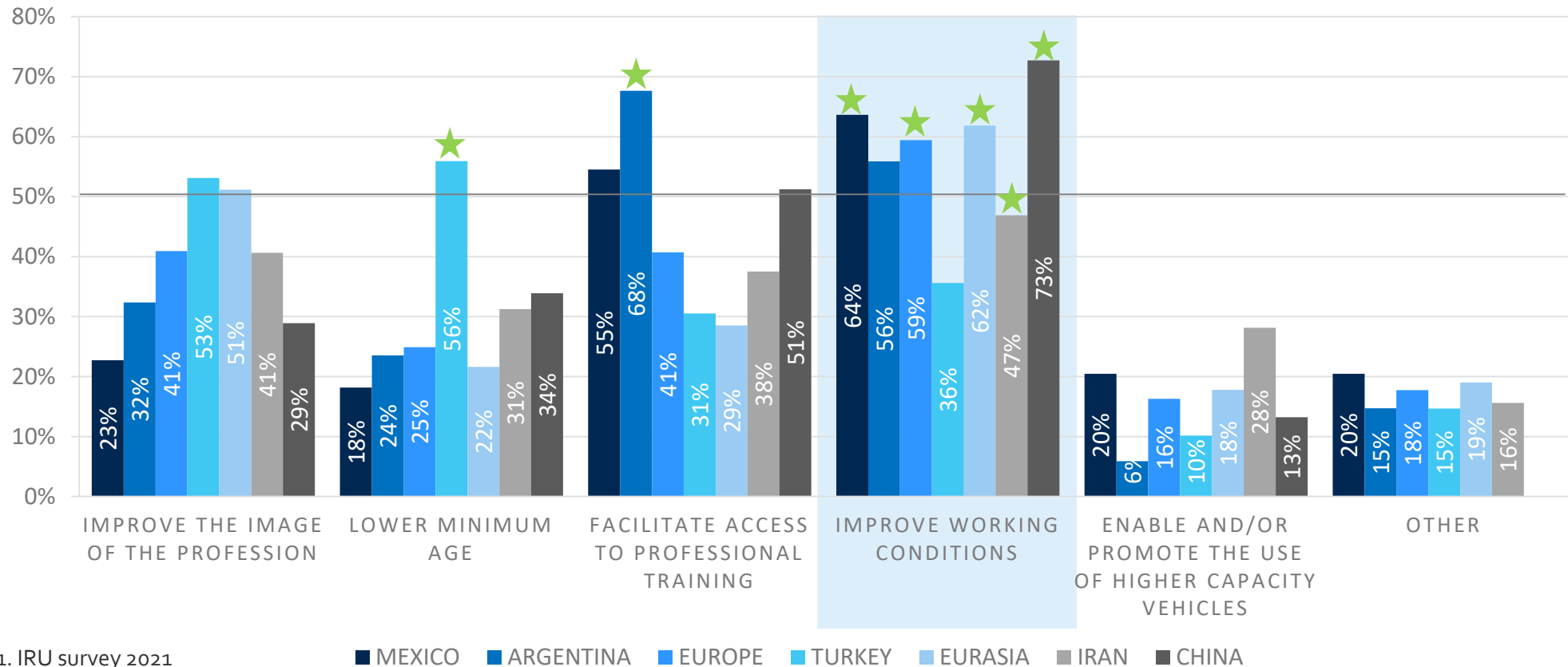
Main reasons explaining truck driver shortage (according to operators surveyed)¹



1. IRU survey 2021

Main measures to be taken by governments to address truck driver shortage (according to operators surveyed)¹

% of respondents ranking reason as top 1 or top 2 by importance



1. IRU survey 2021

■ MEXICO ■ ARGENTINA ■ EUROPE ■ TURKEY ■ EURASIA ■ IRAN ■ CHINA

★ Measure with highest % for a specific region/country

The lack of skilled truck drivers: a key factor of driver shortage

As was the case in 2020, operators from all regions/countries surveyed (except Turkey and China) still consider the lack of skilled drivers to be the most important reason explaining the shortage of drivers affecting them.

On the other hand, when asked about the most needed measures in order to address the shortage and attract more people to the profession, **operators agree that measures aimed at improving working conditions for drivers** should be prioritised: investments in more parking infrastructure, better treatment of drivers at delivery sites (toilets available for driver use, low waiting times/flexible delivery timing, no loading and unloading to be performed by

the driver...) and at roadside checks, are some of the key measures mentioned.

Turkey and Argentina are the two exceptions: for Turkish companies, the main action to take is to reduce the minimum age to access the truck driver profession (currently 21 years old), while in Argentina, facilitation of access to professional training is considered the main priority.

Operators also prioritise facilitating access to professional training (i.e by subsidising/reducing the cost of the training and driver license) and promoting the image of the profession.

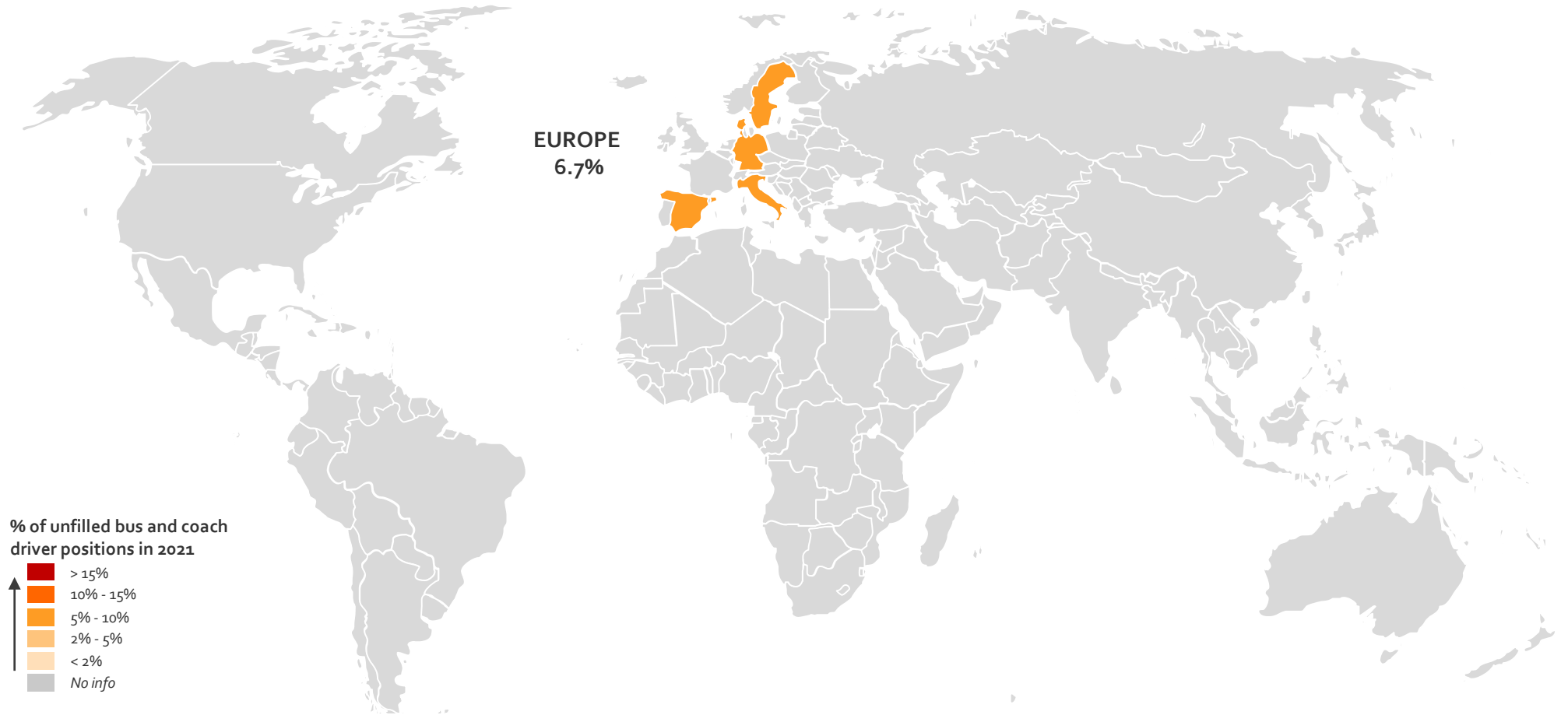
Bus and coach driver shortage

7% of bus and coach driver jobs were
unfilled in 2021 in surveyed countries.



Significant bus and coach driver shortage, despite incomplete post-pandemic recovery

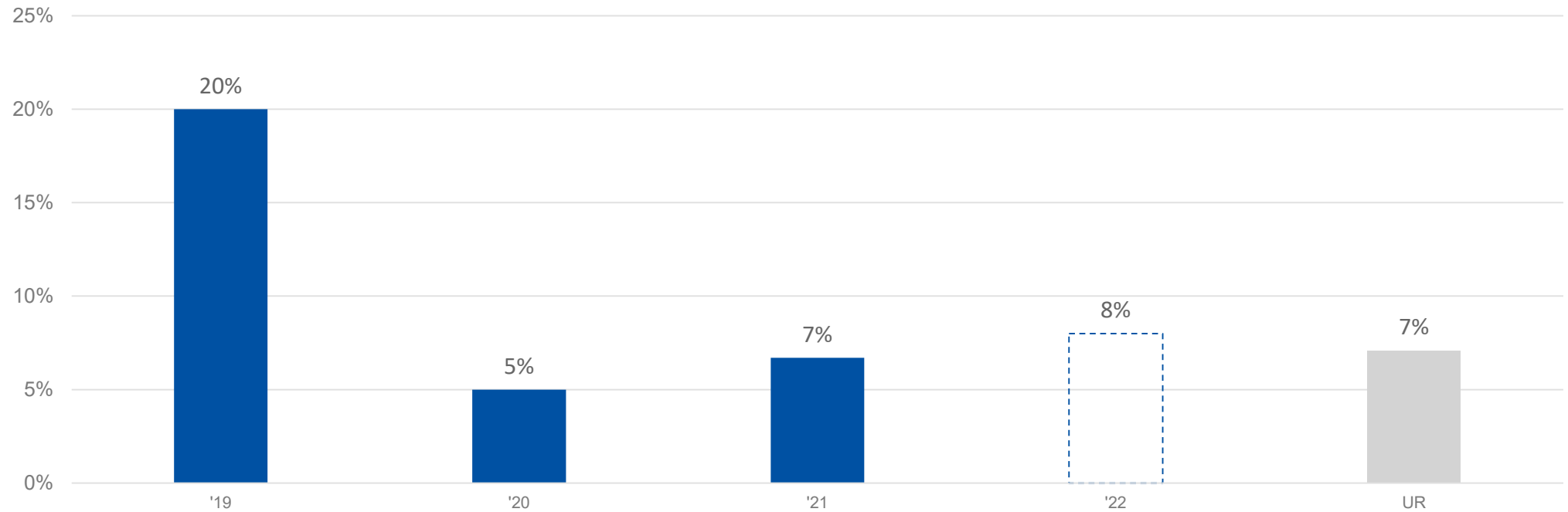
% of unfilled bus and coach driver positions in 2021



Source: IRU survey 2021 and national road transport associations

European bus and coach driver shortage progressively increasing, along with industry recovery from the pandemic

% of unfilled bus and coach driver positions 2019-2022 (FC)¹, unemployment rate (UR) 2020²



1. IRU surveys 2019-2021, FC = forecast (for 2022); 2. Eurostat 2020 (or Europe (EU-27 unemployment))

Increasing bus and coach driver shortages as demand recovers

In Europe, bus and coach driver shortage is steadily increasing, but is still expected to remain far from pre-pandemic levels in 2022.

It increased from 5% to 7% in 2021, and is expected to further increase to 8% in 2022 .

This is the result of increased demand expected for 2022 as mobility restrictions ease, and the decrease of existing drivers due to:

- Bus and coach drivers changing profession as the activity lost in the pandemic will not return

- Less young drivers being trained and accessing the profession, because of low activity, restrictions limiting training capacity, and attractiveness of the profession
- Retiring old drivers who are not replaced with new entrants

Sources : IRU, IRU member associations

Gender representation

Less than 12% of bus and coach drivers are women in Europe.

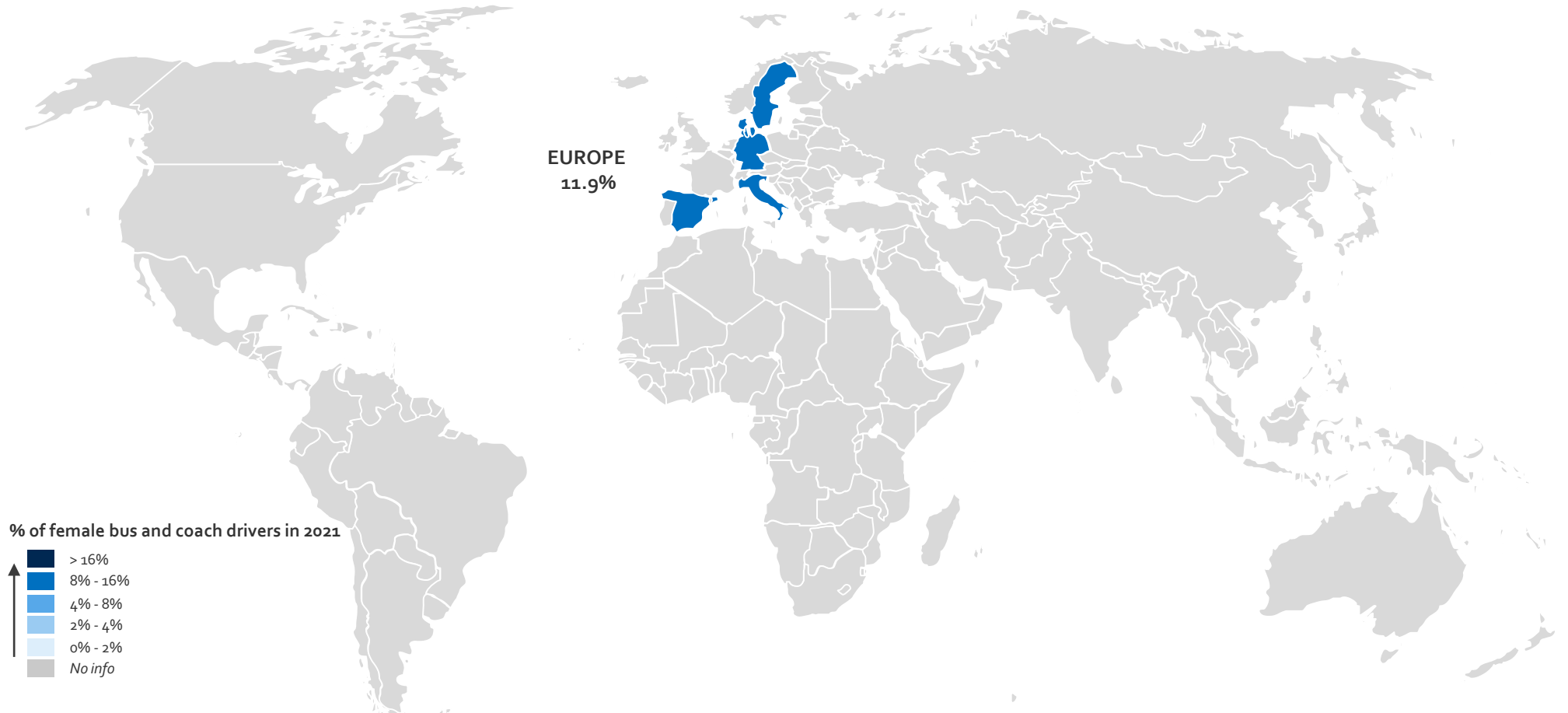
Denmark has the highest women representation among all countries surveyed (22%), while Italy has the lowest (7%).

Even if female representation is higher than in the trucking segment, it is still far behind the transportation industry benchmark (12% versus 22%).

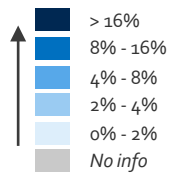


Less than 12% of bus and coach drivers in Europe are women

% of female bus and coach drivers in 2021

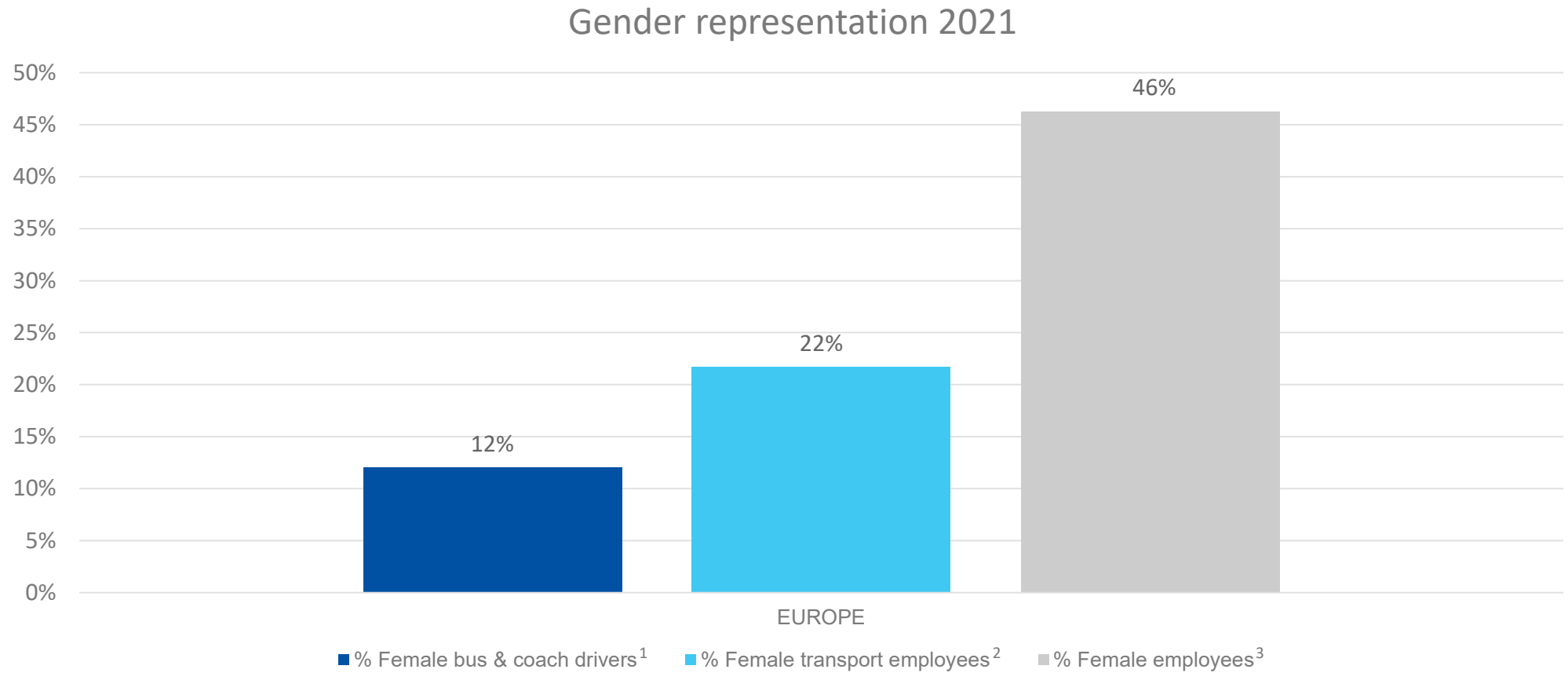


% of female bus and coach drivers in 2021



Source: IRU survey 2021

Female bus and coach driver representation in Europe in 2021 still far from transport industry benchmark



1. IRU survey 2021; 2. Eurostat 2020 (Transportation and storage); 3. Eurostat 2020

Age distribution

Only 3% of bus and coach drivers are below 25 years old in Europe.

Among all countries surveyed, Denmark has the highest representation of young drivers (4%), even if it is still very low.

Italy, on the contrary, has the lowest share of drivers below 25 years old (2%).

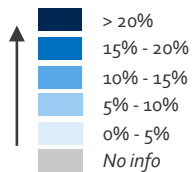
3%

Alarming low share of young people in European bus and coach driver workforce

% of young bus and coach drivers (< 25 years old) in 2021

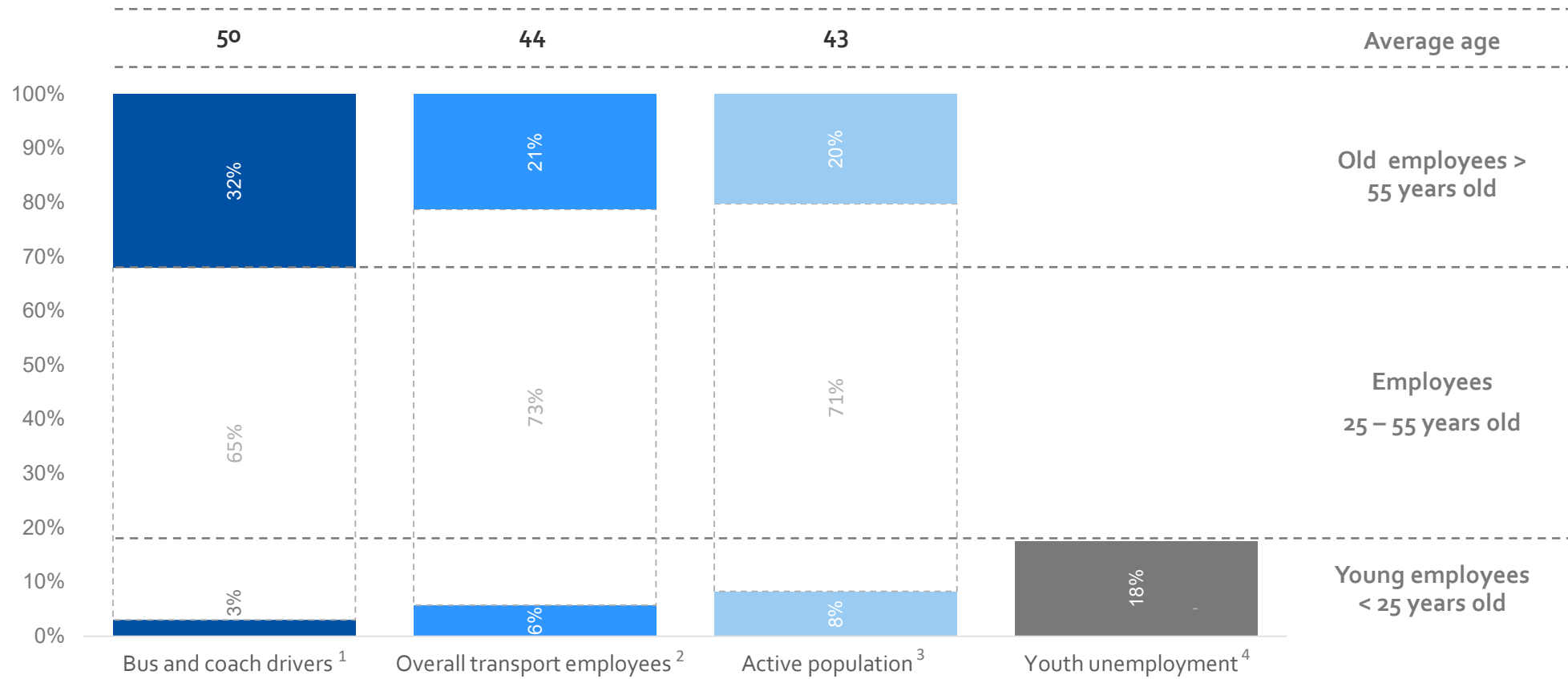


% of young bus and coach drivers in 2021



Source: IRU survey 2021

Wide gap between young and old bus and coach drivers in Europe in 2021



1. IRU Survey 2021; 2. Eurostat 2020 (Transportation and storage) ;3. Eurostat 2020 (EU-27); 4. Eurostat 2020

Bus and coach driver profession: addressing youth unemployment

In Europe, the share of young people in the bus and coach driver population is very low (3%).

One of the main reasons for this is the **ageing population** (in the active population, only 8% are below 25 years old). However, the bus and coach driver profession is still attracting less young people than the transportation industry (6%) and overall employment market (8%), so there is room for improvement.

Another factor is the **minimum legal age** to access the bus and coach driver profession, which goes up to 21 and even 24 years old in some European countries.

Attracting more young people to the driver profession would also be a means to address youth unemployment, which is 18% in Europe, and well over 30% in some European countries (e.g. 38% in Spain).

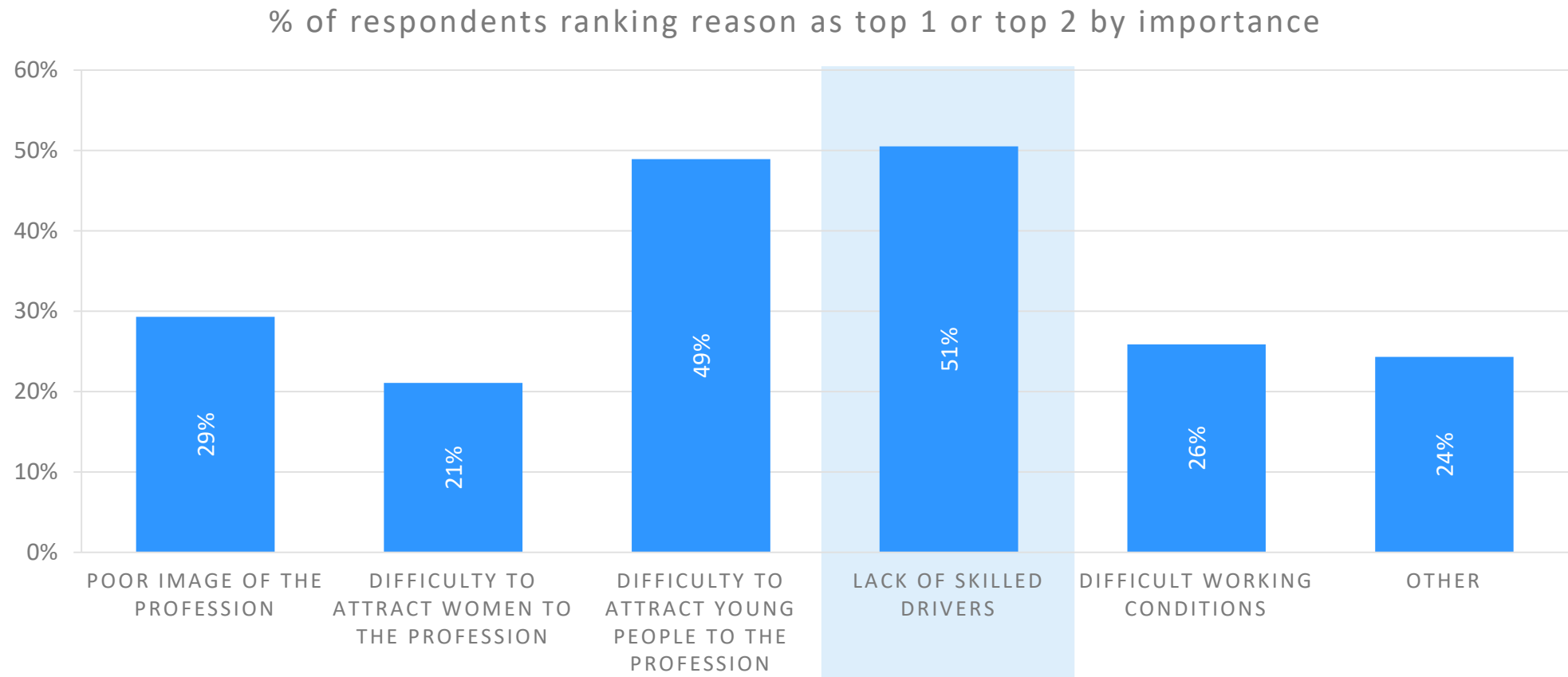
On another hand, Europe also has a high share of drivers over 55 years old (32%), and the average age of bus and coach drivers is 50 years old.

Again, this is partly explained by the general ageing of European population (in the active population, 20% of employees are above 55 years old), but the truck driver workforce is still clearly much older than the active population.

The share of older bus and coach drivers is also higher than the overall transportation employee benchmark (21%).

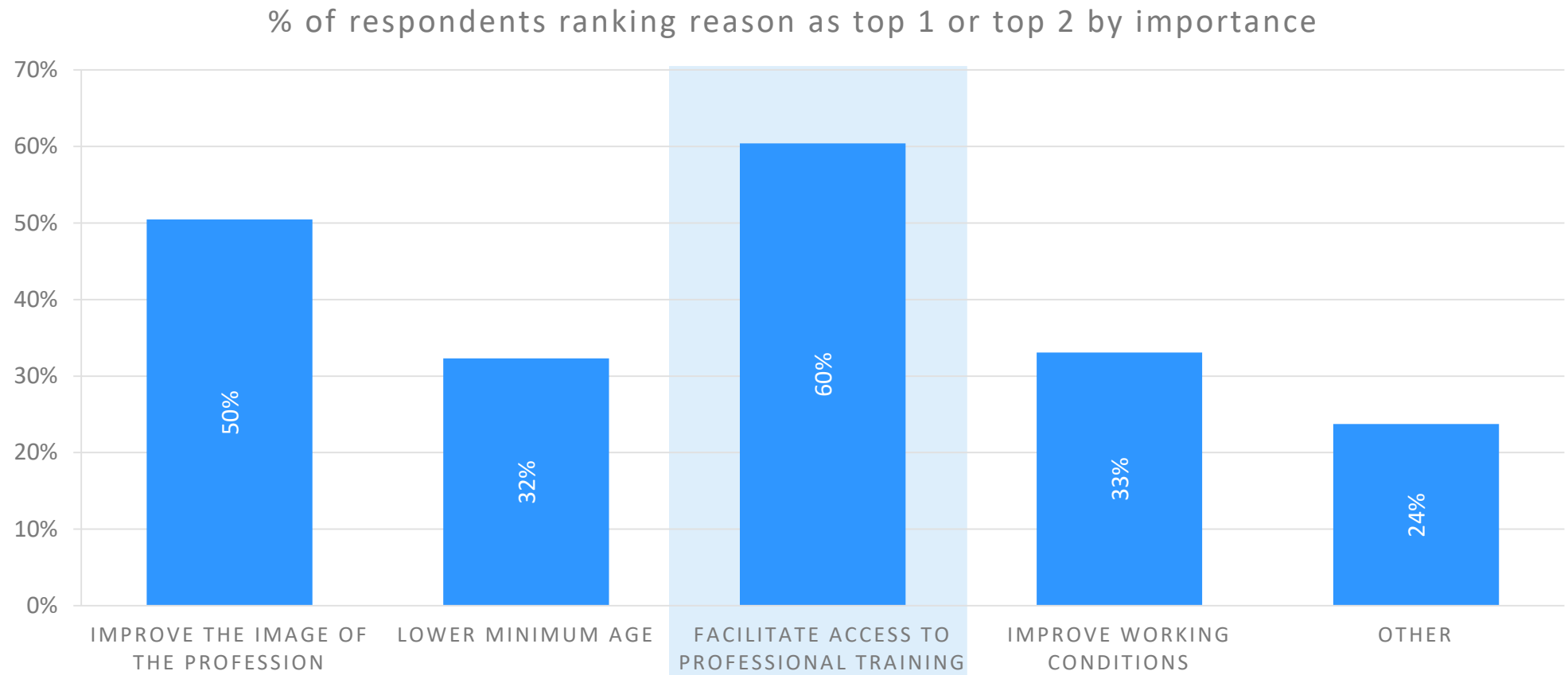
With few young drivers in the profession, a high proportion of old drivers that will retire in less than ten years, and a progressive recovery of passenger transport demand, driver shortage can only become worse in the coming years if no action is taken.

Main reasons explaining bus and coach driver shortage in Europe (according to operators surveyed)¹



1. IRU survey 2021

Main measures to be taken by governments to address bus and coach driver shortage in Europe (according to operators surveyed)¹



1. IRU survey 2021

Lack of skilled drivers is main reason for bus and coach driver shortage

In Europe, operators surveyed consider that the shortage of bus and coach drivers is due to the lack of skilled drivers in the first place, followed by difficulties to attract young people to the profession.

Many companies consider that new inexperienced drivers who have just obtained their license and CPC¹ are not sufficiently trained and skilled. They are sometimes reluctant to hire inexperienced drivers because they would need to invest in further training.

Consequently, they consider that governments should prioritise measures aiming to facilitate access to professional training.

In fact, the cost of access to the bus and coach profession (training, license, driver qualification) is often mentioned as a barrier for new entrants, especially for young people.

Methodology

The IRU driver shortage survey is shared by IRU members to their member road transport companies. The 2021 results were collected between October 2021 and January 2022, and **1,524 companies from 25 countries** (including both passenger and goods transport companies) answered.

For each topic (driver shortage, percentage of women drivers, percentage of young and old drivers, average age), the results show the average, weighted by each company's number of drivers, and the country's weight in terms of road transport employees¹/ transportation and storage employees² vis-à-vis the regional average.

The **share of unfilled driver positions** is based on the answers to the questions "How many drivers do you currently employ?" and "How many unfilled driver positions do you currently have?". The forecast for 2022 is based on the respondents' own forecasts (answers to the questions "Please indicate the expected number of drivers you will need next year (assuming business as usual)" and "How many of these driver positions will you not be able to fill (because of driver shortage)?").

The **number of unfilled driver positions** is based on the total number of drivers working for logistics companies and shippers, provided by national road transport associations (IRU members), and the

percentage of unfilled driver positions (the number of drivers is considered to correspond to the number of driver positions that are filled).

The share of unfilled positions is calculated based on the companies that responded to the survey. In the case of freight, it is mainly road freight transport companies (for hire and reward), as there were very few shippers/own-account companies responding to the survey. Considering that, for this type of company, the percentage of unfilled positions could be lower than for road freight transport operators for hire and reward (i.e. shorter distance transport), the total number of unfilled driver positions indicated could be slightly higher than the actual figure.

1. For European region; 2. for Eurasian region