



Intelligence
Briefing

Driver Shortage Report 2023 Freight – Europe

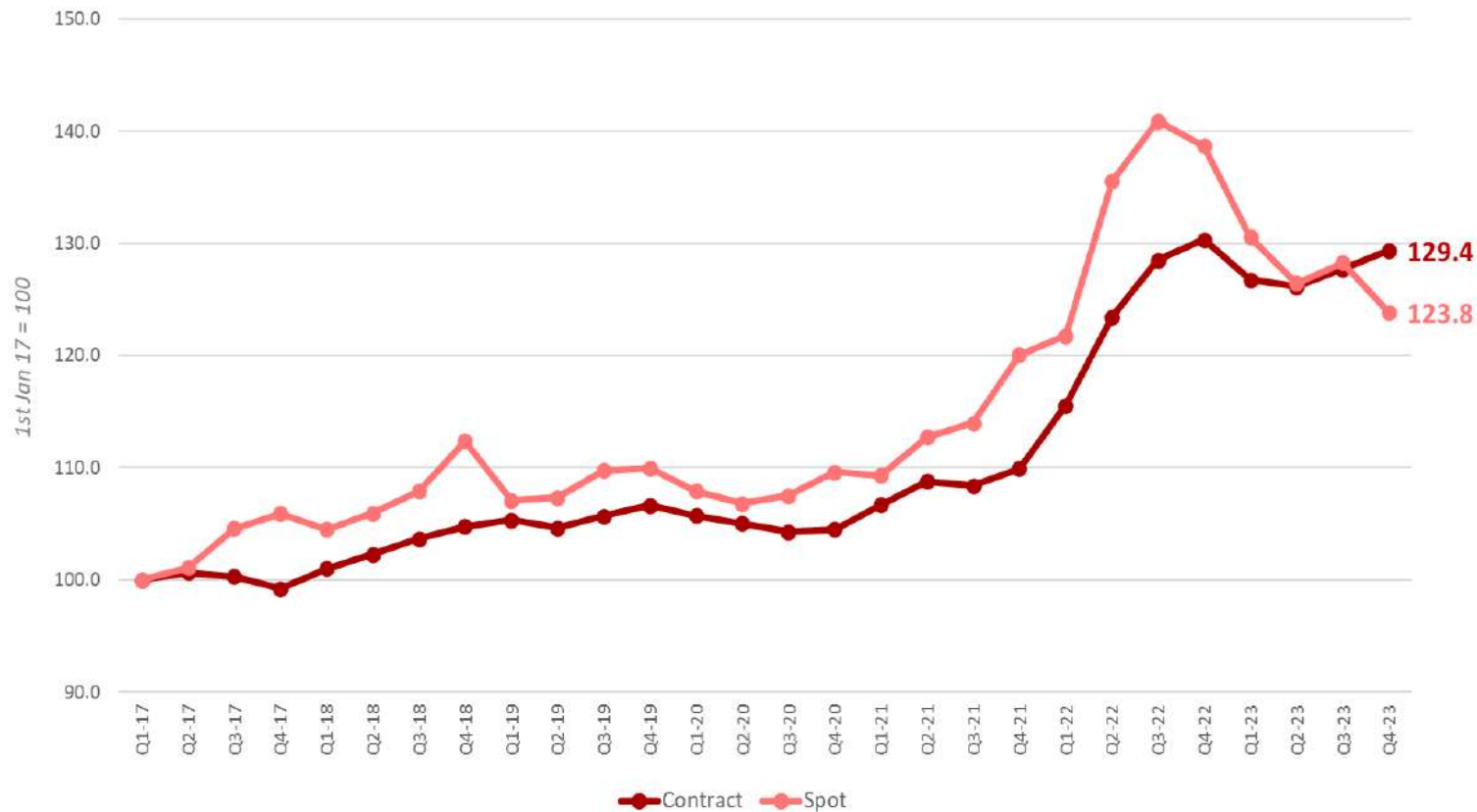


Table of contents

	Geographical scope	6
1.	<u>Overview</u>	7
2.	<u>Economic outlook</u>	12
3.	<u>Driver shortage</u>	24
	The importance of the trucking industry	26
	• Driver shortage in 2023	28
	• Gender balance	33
	• Age distribution	37
	• Driver shortage forecast 2028	41
	• Third-country drivers (non-EU countries)	45
	• Impacts of the driver shortage on businesses	47
4.	<u>Access and attractiveness</u>	48
	Context	49
	Operators' current strategies to attract and retain drivers	53
	Access to the profession	58
	• Current barriers and areas of opportunity	58
	• Solutions implemented by transport associations and companies	62
	Attractiveness of the profession	74
	• Challenges limiting the attractiveness of the profession	74
	• Solutions implemented by transport associations and companies	81
5.	<u>Methodology and definitions</u>	101
6.	<u>References</u>	103

High consumer prices and lagging wages reduced European transport demand and freight rates in 2023





Upply's European road freight price index



- Weak and falling demand for road freight across Europe has pulled down spot rates.
- The spot index has been falling since end 2022. In Q4 2023, it was down - 14.8 points year over year.
- Contract rates remained elevated due to cost pressure.
- The spot index now sits 5.5 points below the contract index, meaning that spot rates are now closer to their base level than contract rates. This doesn't mean, in monetary terms, average spot rates are below contract rates, but we are now seeing this trend for several international lanes.

Europe

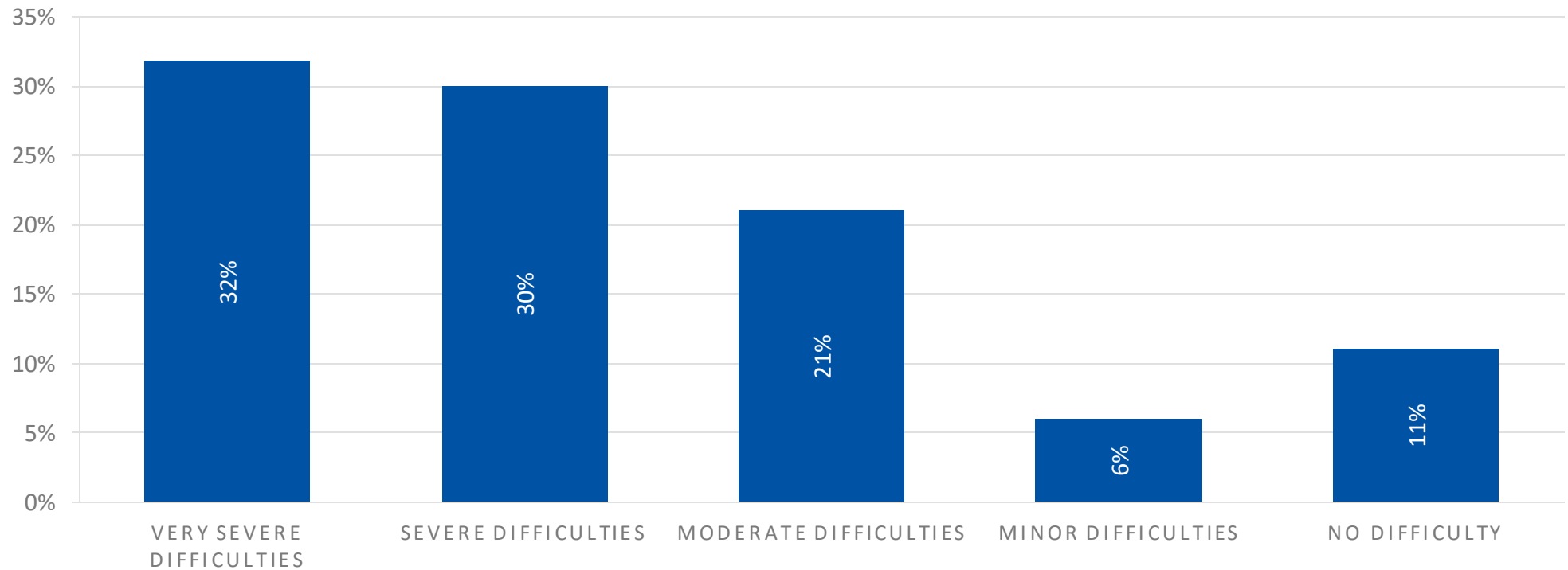
Key indicators – Road freight

 Road freight employees ¹	 Trucking industry revenue ²	 Road freight companies ¹
3.4M	597B USD	568K
 Truck drivers ³	 Trucks ⁴	 Road trade volume ⁵
3.2M	6.5M	2.1T tkm

Driver shortage in 2023

62% of European road freight companies face severe or very severe difficulties filling truck driver positions

How much difficulty are European companies having to fill driver positions?
(% companies)



Source: IRU 2023 survey question "How much difficulty are you having to fill driver positions due to the shortage of drivers?"

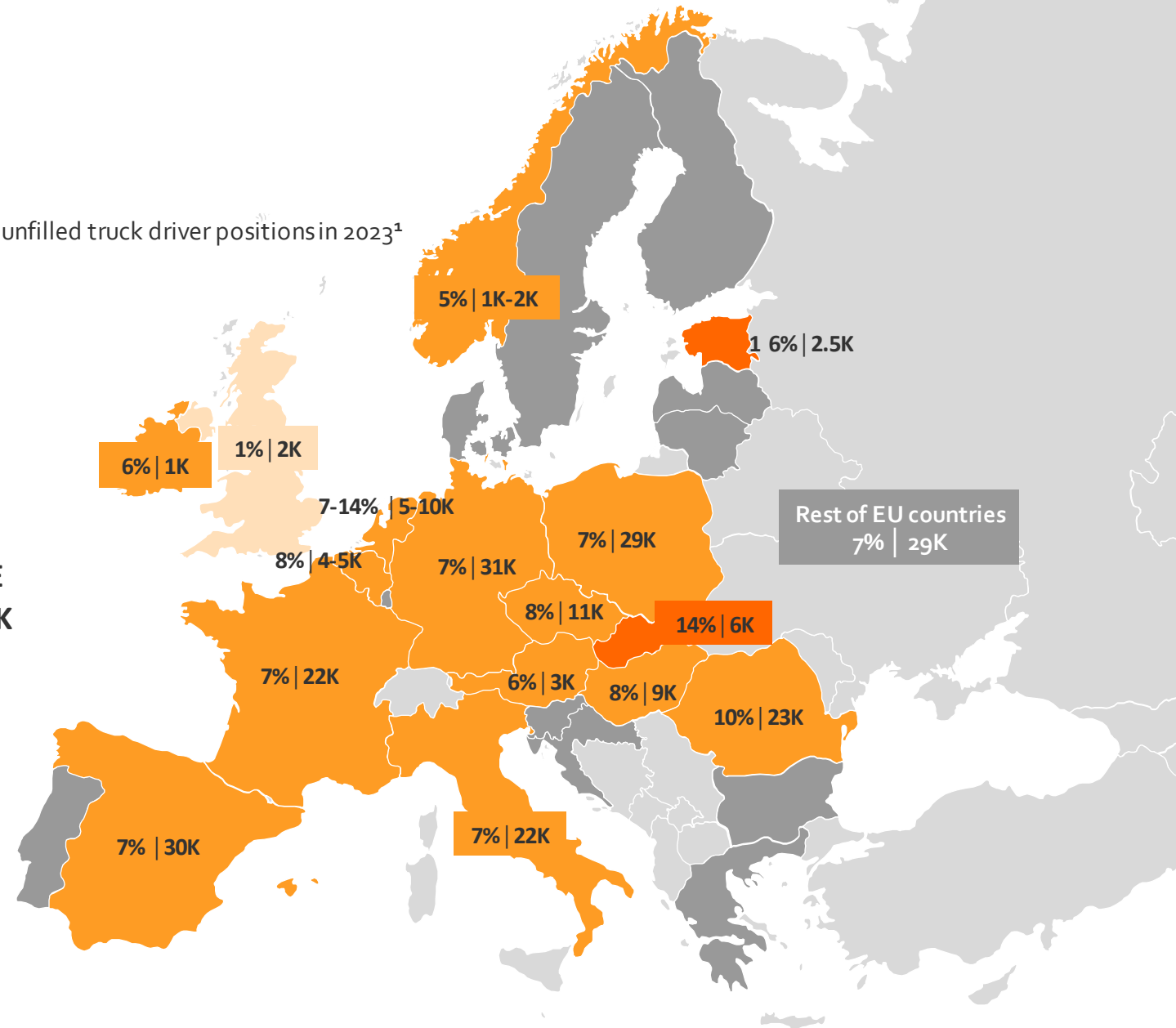
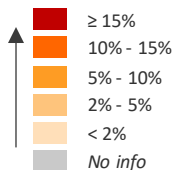
Driver shortage in 2023

Truck driver shortages in 2023

% of unfilled truck driver positions in 2023 | Number of unfilled truck driver positions in 2023¹

EUROPE
7% | 233K

% Unfilled truck driver positions 2023



Source: IRU 2023 driver shortage survey, Eurostat and IRU national road transport associations. Unfilled truck driver jobs are calculated based on the total number of truck drivers in each country, from Eurostat 2022-Q1 (Labour force survey - 20220829_R13650_1_20220829_152812_ESTA57386_Q extracted on 30/08/2022) and the share of vacant positions reported by road freight companies (more details available in the methodology). For countries that did not participate in the survey (dark grey), we assumed that the share of unfilled positions is equivalent to the European average (7%).