



# Intelligence Briefing.

Global Driver Shortage  
Report 2025

Trucks, Buses and Coach

Preview

## Chapter 1

# Introduction

### Road transport runs on its drivers

Road transport runs on its drivers. Yet the labour force that trucks, buses and coaches depend on has been thinning across most surveyed markets for the better part of a decade. The 2025 results in this report confirm that the gap between need and supply is no longer closing. What began in the post-pandemic period as a tight labour market has hardened into a structural condition. The drivers who staff the European road freight fleet, the regional bus network and the cross-border coach tour are not merely scarce. The pipeline meant to replace them is too narrow, and the working conditions no longer match what younger entrants expect from a profession.

This is the sixth edition of the IRU driver shortage survey, conducted annually since 2019, with the exception of 2022. Distributed through IRU's national association network to road transport operators across 19 markets, including 14 in Europe plus Australia, Brazil, China, Mexico and Uzbekistan, the survey captures the proportion of unfilled driver positions, the demographic composition of the current workforce, perceived recruitment difficulties, and the reasons operators themselves identify as causes behind the shortage. Brazil was

added for the first time in 2025, extending the survey's reach into Latin America's largest road freight market. With each successive wave, the survey is becoming the most comprehensive cross-market view available of professional driver supply, refreshed continuously so that direction of travel can be tracked rather than inferred.

Two features make the 2025 edition distinct. First, the report covers both goods and passenger road transport, with bus and coach operators in Germany and Spain allowing a like-for-like comparison across two of Europe's largest markets. The evidence shows that, while operating realities differ between passenger and goods transport, the underlying labour-market dynamic is the same crisis taking a different shape. Second, for the first time this year, the quantitative findings have been deepened by ten in-depth qualitative interviews with national associations and major operators across Australia, Brazil, Canada, Europe and Türkiye. These conversations add depth that survey data alone cannot provide, exploring why a pay rise no longer closes the gap, what younger drivers are actually asking for, and how public-private interventions can deliver measurable results.

Latest survey data reveals China’s truck driver shortage sits at 10% in 2025.

Mexico has remained consistently high, reaching 14% in 2025, up 2 percentage points year on year. Mexico’s sustained shortage over time points to structural challenges rather than cyclical pressure from freight demand.

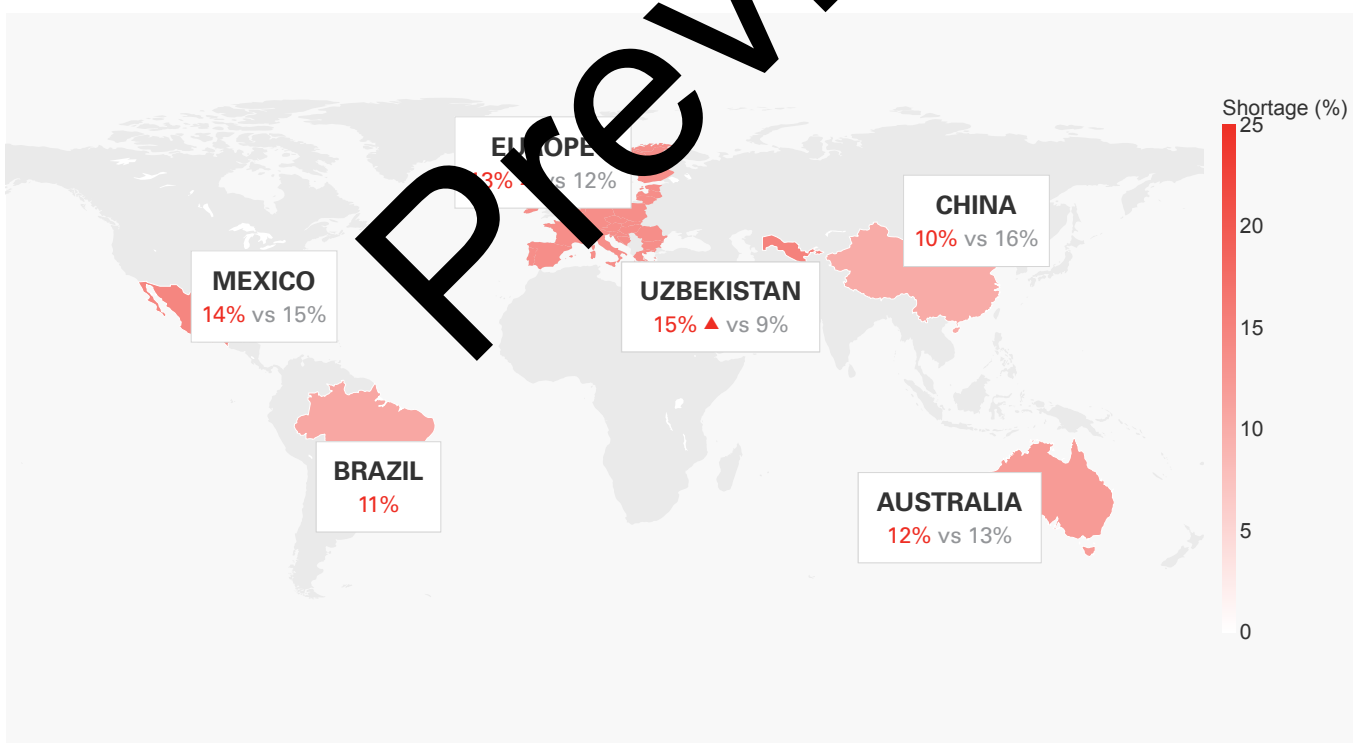
Uzbekistan shows the most volatile results, rising from 9% in 2024 to 15% in 2025. This volatility reflects a demand-driven shortage rather than a demographic one, presenting a different challenge from that observed elsewhere.

Australia’s truck driver shortage also persists, from 13% in 2024 to 12% in 2025. This trend is consistent with an ageing driver workforce and a cost-intensive operating environment, as indicated by survey respondents.

IRU member NatRoad, the national Australian association, confirmed that these findings align with member reports and offered a clear framing of the demand-driven mechanism behind the trend.

Australian GDP per capita grew by around 1% in 2025 and, coupled with rising inflation, this translates into stronger purchasing power.

Figure 1. Global truck driver shortage in 2025 vs 2024



Base: 2025 trucking companies - Global

Note: Driver shortage is derived from two questions estimating the proportion of unfilled driver positions out of the total driver labour force. Results based on weighted sample.

Q6. How many drivers do you currently employ?

Q12. How many unfilled driver positions do you currently have?

## Small operators at the centre of the truck driver shortage

Europe's 13% headline shortage, representing 502,000 unfilled positions, is not evenly distributed. Smaller operators, employing fewer than 50 people, report an average shortage rate of 15%, compared with 9% for those with 50 or more employees, a gap of 6 percentage points. This imbalance is consistent across every European country surveyed. The structural reasons are well established: smaller operators tend to recruit through personal and local networks rather than dedicated human resources functions, and they cannot match the wages, training subsidies, or fleet-renewal incentives that larger firms can deploy in a tight labour market.

European road freight is predominantly composed of small firms, approximately 98% of EU enterprises in the sector employ fewer than 50 people, and those firms account for around 79% of the road freight workforce.<sup>4</sup> The small-firm shortage is therefore not a marginal problem, it impacts more severely the core of European road freight operations.

The 2025 survey data highlight a structural problem that will deepen over the coming years. Small operators have an older workforce, 45% of their drivers are aged 55 or above, against 37% at larger firms, meaning the retirement wave due to land between now and 2030 will hit them disproportionately harder. This eight-percentage point gap in older workforce between smaller and large companies

is a broadly consistent pattern across all the European countries surveyed, reinforcing this finding.

The proportion of younger drivers is small, across both small and large firms (5% and 6%, respectively). This result suggests that regardless of company size, the struggle to attract younger entrants to the profession is a sector-wide challenge. Even large firms with dedicated HR resources, training budgets and stronger employer brands are not recruiting young drivers in significant numbers. The driver workforce is getting thinner, but the retirement risk exposure is still higher at the small firms that make up the overwhelming majority of the European road freight market.

**The 660,500 projected European driver retirements over the next five years will not land evenly, they will land predominantly on the segment least equipped to endure them**



4 Eurostat (sbs\_sc\_0vw)

## IRU action: building sustainable pathways for third-country drivers

### **IRU Examiner** **Assessing professional competence against internationally recognised standards**

IRU Examiner provides governments, certification bodies and training organisations with the methodology, question banks and digital tools to assess and certify road transport professionals against internationally recognised competency standards. It supports transparent, reliable and harmonised certification, helping build trust in driver qualifications across borders.

Addressing Europe's driver shortage requires more than domestic recruitment. With over 502,000 unfilled truck driver positions and an ageing workforce, qualified drivers from third countries represent an increasingly important part of the solution. However, international recruitment can only succeed if supported by transparent mobility pathways, recognised professional qualifications and efficient administrative procedures.

### **Facilitating skilled driver mobility**

IRU is working with governments, EU institutions and industry partners to establish structured and socially compliant pathways for employing qualified third-country drivers.

Through the SP4EU (Skilled Driver Mobility for Europe) project, funded by the International Centre for Migration Policy Development (ICMPD) and the Migration Partnership Facility (MPF), IRU is developing operational mobility pathways between Morocco and Italy, and Egypt and Romania.

At the request of the European Commission, IRU also led the STEER2EU study, the most comprehensive assessment to date of employing non-EU bus and truck drivers in Europe. Covering 20 third countries, the study identified qualification gaps, mapped legal and administrative barriers, and provided an evidence base to support future EU policy reform.

### **Assessing professional qualifications**

Sustainable driver mobility depends on internationally recognised professional standards. IRU is working with governments to strengthen training systems, examination methodologies and qualification recognition, building trust in driver competence across borders.

This work is supported by the ECMT Quality Charter, the new three-level IRU Academy Certification Scheme and the IRU Certify digital platform, creating a trusted framework for internationally recognised driver qualifications. IRU also supports governments and certification bodies through dedicated certification solutions, including IRU Examiner.

***“Professional mobility starts with professional trust. When governments recognise common standards for driver qualifications, skilled drivers can move across borders with confidence, helping operators fill vacancies safely and efficiently.”***

**Patrick Philipp, Director of Certification and Standards, IRU**



# Driver retention starts with listening

For CEVA Logistics, improving driver retention starts with understanding drivers' concerns and acting on them.



**Marco Henry**  
Global Ground & Rail Procurement  
and Fleet Management Director,  
CEVA Logistics

Driver shortages remain one of the industry's top concerns. But according to Marco Henry, Global Ground & Rail Procurement and Fleet Management Director at CEVA Logistics, wages are no longer the only battleground.

"What is changing today, especially in North America, but also in Europe, is that truck conditions are an important element of drivers leaving the company."

For drivers, small operational failures can quickly become major frustrations: poor maintenance, defective equipment or delays in repairs.

Work-life balance is another decisive factor. In North America and Australia in particular, CEVA sees drivers moving from long-haul to short-haul work, sometimes accepting lower pay in exchange for more time at home.

Around five years ago, CEVA launched a structured retention and recruitment programme centred on driver feedback. The results have been significant: driver turnover fell from 50% in 2022 to 17% in 2025.

The key is not just collecting feedback, but acting on it.

"Drivers are showing a very high level of maturity, providing real insights and putting real problems on the table."

The most common concerns relate to facilities at loading and unloading sites, late documents, and equipment maintenance. CEVA has responded by investing in showers, rest areas and more comfortable waiting facilities.

"If you don't come back to the driver saying, 'we've taken note of what you're saying and we're going to work on it', then avoid it. Otherwise, it's useless."

## Casting a wider net

CEVA is also widening its talent pool through programmes supporting women and younger entrants. In North America, initiatives such as "Dock to Driver" provide warehouse employees with a pathway into driving careers.

Infrastructure remains a challenge, particularly in Europe, where poor truck parking and rest facilities continue to affect driver attraction and retention.

For CEVA, the message is clear: pay matters, but better equipment, better communication and better infrastructure are equally important to retaining drivers.



## About CEVA Logistics

CEVA Logistics provides global supply chain solutions to connect people, products and providers all around the world. CEVA offers a broad range of end-to-end, customised solutions in contract logistics and air, ocean, ground and finished vehicle transport in 170 countries worldwide thanks to its approximately 110,000 employees.

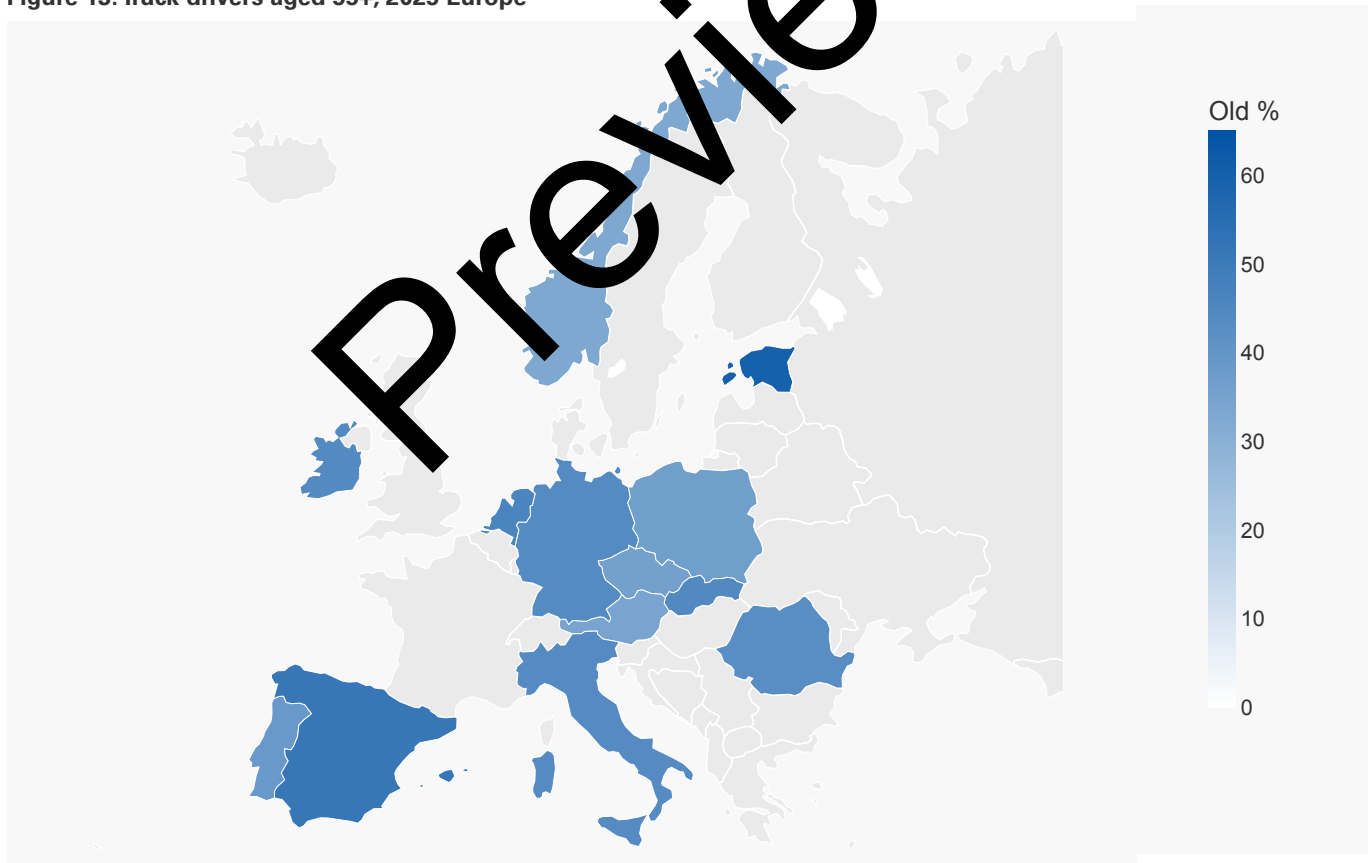
***“If we do nothing, this will become very serious for the profession. We need to change mindsets, particularly among young people.” (AFTRI, IRU interview 2026)<sup>9</sup>***

UND also highlighted the role of digitalisation in making the profession more attractive. The ongoing digital transformation of road transport, including the wider use of electronic transport documents, e-CMR, eFTI systems and paperless logistics has the potential to reduce administrative burdens, improve operational efficiency and make the profession more

appealing, particularly to younger workers seeking technologically advanced working environments.

The structural conclusion is that general workforce ageing, whether measured at economy-wide or transport-sector level, cannot explain the driver-specific gap. Sector-specific mechanisms, such as training costs and licensing barriers to entry (for example, C/CE/D licences costing roughly EUR 3,000 to EUR 7,000 in most EU markets, largely borne by individuals), may deter entrants to the profession.

**Figure 13. Truck drivers aged 55+, 2025 Europe**



**Base:** 2025 trucking companies - Europe  
**Q7.** What is the average age of your drivers?

9 Quote translated from French.

# Opening the road: women drivers help Türkiye soften its driver shortage

The shortage of professional drivers remains a major challenge in Türkiye. Elif Nuhoğlu explains how cooperation between industry and government is helping attract more women and young people into the profession.



Elif Nuhoğlu, EU and International Relations Unit Manager at UND

For Elif Nuhoğlu, EU and International Relations Unit Manager at IRU member UND, one of the clearest answers to the driver shortage is to widen access to the profession. This means attracting more women and younger people while making training more accessible and affordable.

The UND Women Truck Driver Academy was created to do exactly that.

Developed in 2025 by UND together with Türkiye's Ministry of Transport and Infrastructure and the Ministry of Labour and Social Security, the academy combines professional training and government incentives for companies hiring women drivers.

"It took around a year and a half to get it off the ground. Before launching the academy, we interviewed women truck drivers," Elif Nuhoğlu told us. "Their stories showed that truck driving is a profession women can do successfully."

"The academy has helped make women drivers more visible. It has also shown public authorities and companies that there is real interest among women in joining the sector."

More than 400 candidates applied to the academy in 2025. The first two

groups have already graduated, with women accounting for around 70% of participants in the second group. Younger generations in particular, a more digital and technologically advanced working environment can increase interest in professional driver career paths."

The programme combines 100 hours of theory and 60 hours of practical training.

"Cost is one of the main barriers to entering the profession. Many people want to become truck drivers, but do not know how to access training or cannot afford the full process."

Working conditions are another major factor. Elif Nuhoğlu pointed to border delays and the need for better truck parking areas. Safe and suitable facilities are especially important to attract more women.

## Growing interest

Interest among younger people is also increasing.

"For younger drivers, part of the attraction is the opportunity to travel abroad."

## Digitalisation

Elif Nuhoğlu believes digitalisation can further improve the profession's attractiveness.

## Together we can

For Elif Nuhoğlu, the key lesson is clear: no single actor can solve the shortage alone. Governments, industry associations, companies and international organisations all have a role to play.



## About UND

Founded in 1974, UND is a professional association representing the international road transport sector. It works to remove barriers, promote efficient and sustainable services, and cooperates with global institutions such as IRU while building regional and international partnerships.

Chapter 7

# Bus and coach driver shortage in 2025

**When broken down by dominant operation type, a consistent pattern emerges across both countries, with coach tourism operators reporting materially higher shortage rate than the national average, while urban and peri-urban operators sit below it**

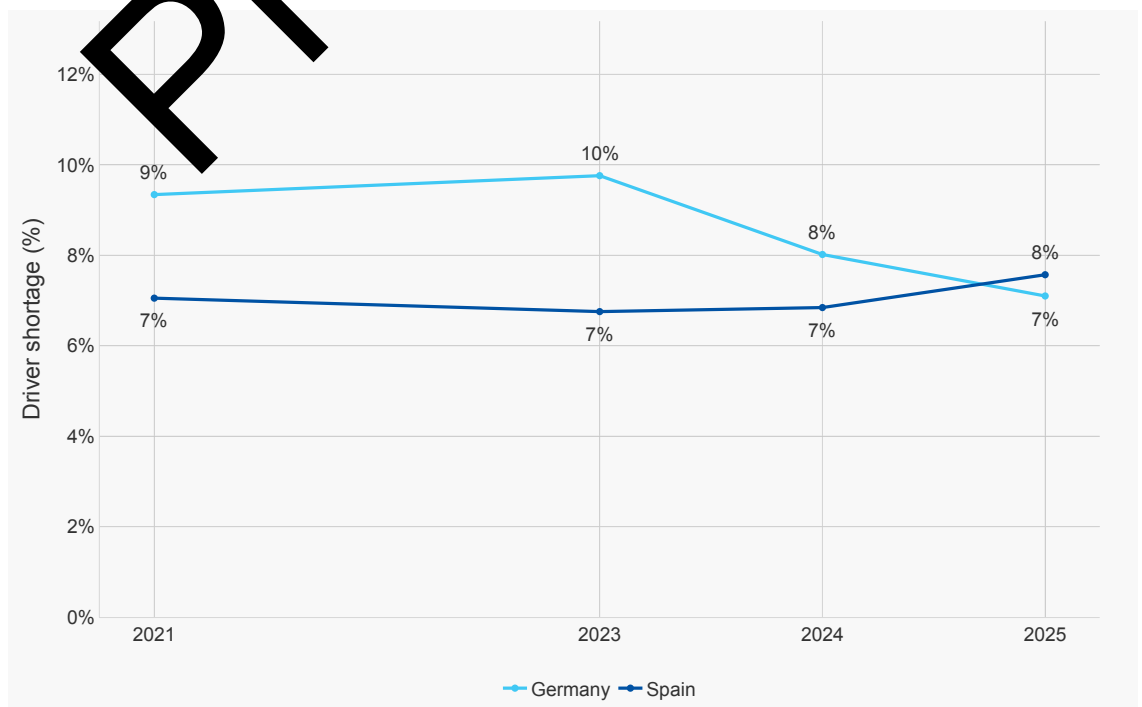
The 2025 survey places the bus and coach driver shortage at 8% in Spain and 7% in Germany. When broken down by dominant operation type, a consistent pattern emerges across both countries, with coach tourism operators reporting materially higher shortage rates than the national average, while urban and peri-urban operators sit below it.

CONFEBUS, the Spanish bus and coach association, confirmed that touristic areas are more affected by the shortage, and added that rural operations are also experiencing a lack of drivers, as depopulation of rural Spain has structurally reduced the labour pool.

The coach tourism shortage is linked to structural characteristics of the market. Since contracts are often concluded with limited lead times, operators must remain flexible to respond to demand, which can reduce the advance visibility of work schedules for drivers:

*“Services in the coach tourism segment can be hired only with little time before service delivery, and occasionally at a very short notice. This limits the advance visibility available for scheduling, requiring both operators and drivers to adapt to changing demand.”* (CONFEBUS, IRU interview 2026)

Figure 27. Bus and coach driver shortage, 2025 Germany and Spain



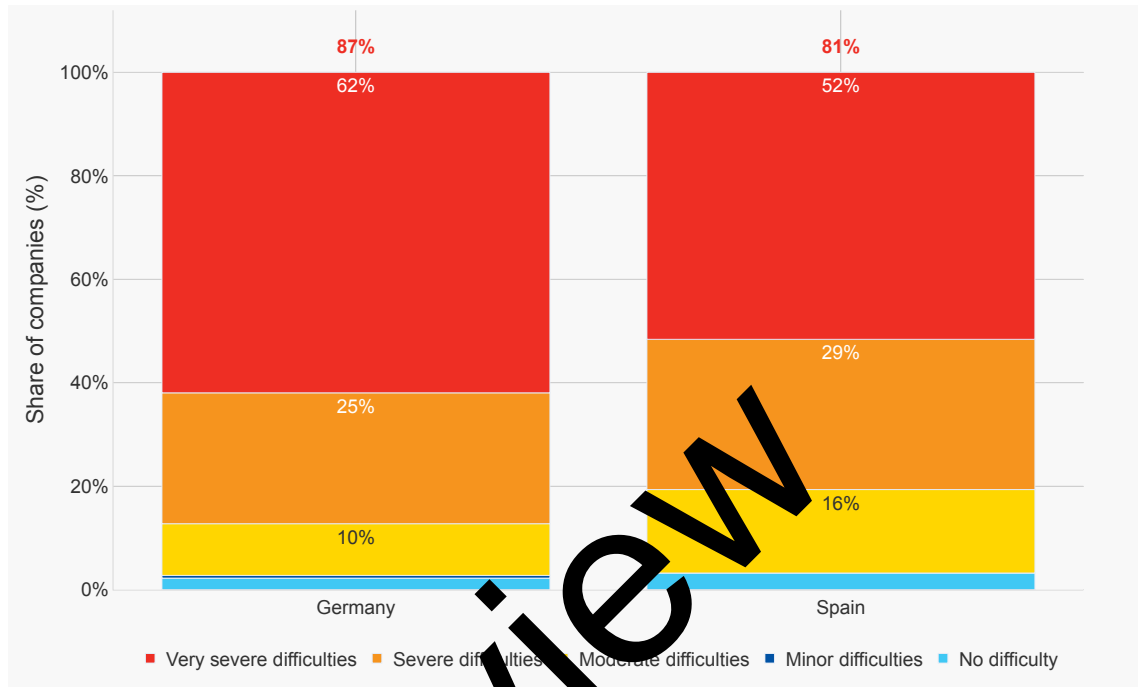
Base: 2025 bus and coach companies

Note: Results based on weighted sample. There are no statistically tested significant differences with 2024 results.

Q6. How many drivers do you currently employ?

Q12. How many unfilled driver positions do you currently have?

**Figure 29. Difficulty recruiting bus and coach drivers, 2025 Germany and Spain**



**Base:** 2025 bus and coach companies – Germany n=65, Spain n=40  
**Note:** Results based on weighted sample. There are no statistically tested significant differences with 2024 results.  
**Q11.** For the following list of transport and logistics positions, are you experiencing difficulties filling them in (or accessing these services in case you have externalised them) due to labour shortages?

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The most plausible explanation is that the bus driver candidate pool is structurally smaller relative to demand, which may be linked to the more demanding training requirements as outlined in the table below for Germany.

Minimum age requirement stands out as the key structural barrier for young entrants. It is currently 24 (or 21 with the full CPC qualification) for the D driving licence, meaning operators cannot easily convert a willing young entrant into a deployable driver quickly. The pool of licence-holders is finite, geographically concentrated, and ageing at roughly the same

rate as the workforce itself. When a vacancy arises, there are simply fewer available candidates per opening than in trucking, even if the absolute number of vacancies is lower. The difficulty question is capturing that structural scarcity of supply.

The financial barrier to entry differs structurally between the two sectors. In passenger transport, the cost of obtaining a D driving licence and the associated CPC qualification is, in many EU countries, partially or fully covered by public transport operators or by public funding schemes, reflecting the status of bus and coach driving as a public service occupation.