What about innovation?

Getting more people behind the wheel

12 December 2023
AGENDA

1. Global driver shortage context
2. Innovative best practices to better attract and retain truck drivers
3. Questions & Answers
   Post your questions on the chat!

IRU Anti-trust Statement

We remind you that all discussions and statements made by participants on commercially or strategically sensitive information may fall within the scope of competition law and be considered as unlawful. We invite you to refrain from sharing any information of such nature or entering into any such discussion, including during breaks.
1. Driver shortage context
Driver shortage 2023

Over 3.0 million truck driver jobs are unfilled in 2023.
Truck driver shortage remains high and worsens significantly in certain countries

% of unfilled truck driver positions 2023 | Number of unfilled truck driver positions (thousands)

- **USA** - | 64k
- **EUROPE** 7% | 233k
- **ARGENTINA** 11% | 60k
- **MEXICO** 9% | 56k
- **RUSSIA** 14% | 302k
- **TURKEY** 16% | 84k
- **UZBEKISTAN** 15% | 3k
- **CHINA** 12% | 2.2M

Source: IRU survey 2023 and National Road transport associations

* American Trucking Associations (ATA) estimation
Gender representation

Across all regions analysed, 6% or less truck drivers are women, except in the United States (8%).

- United States: 8%
- Europe: 4%

Source: IRU survey 2023 and National Road transport associations, US Bureau of Labour statistics
Age distribution of truck drivers will lead to higher shortages, if no action is taken to ensure the replacement of older drivers.

Age distribution truck drivers 2023

Sources: IRU survey 2023, US bureau of Labour Statistics
High licence and qualification costs are a barrier to accessing the truck driver profession

Cost of licence and qualification versus monthly cost of living and minimum and legal gross salary
Reduced attractivity of the profession due to difficult working conditions and long periods of time away from home

According to truck drivers, what are the main reasons behind the high level of driver shortage?

% of interviewed answering “very important” and “important”

- Poor image of the profession: 59%
- Difficult working conditions: 76%
- Complex regulatory requirements (Certification): 62%
- High cost to obtain the driver’s license: 60%
- Spend long periods of time alone and away from home: 77%

5 point scale: Very important (5), Important (4), Moderately important (3), Slightly important (2), Not important at all (1)

Source: IRU survey 2018, Truck Driver Shortage – The view from the frontline.
Age distribution of truck drivers will lead to higher shortages, if no action is taken to ensure the replacement of older drivers.

Age distribution truck drivers 2023

Sources: IRU survey 2023, US bureau of Labour Statistics
Driver shortage forecast 2028

By 2028, over 7.0 million truck driver jobs could be unfilled globally.

Scope of countries: United States (ATA estimation), Mexico, Argentina, Europe (EU-27 + United Kingdom, Norway), Russia, Turkey, Uzbekistan, China.

Sources: IRU and IHS Markit calculations based on: Trucking revenue (real) growth representing the monetary value of the volume of goods transported. We consider that this indicator represents the road freight transport demand. Drivers currently above min age of retirement (except for Europe, above 65 years old) will retire by 2028. Assuming same distribution by age of drivers over 55 years than labour force Driver productivity remains the same. Driver productivity is the level of service provided by the driver per unit of time.
More secure working conditions, well-equipped rest zones and more flexible working hours are key to attract more drivers

According to truck drivers, what would contribute most to attract and retain drivers?

% of interviewed answering “very important” and “important”

- More secure working conditions: 95%
- Well-equipped rest zones: 84%
- Flexible working hours: 85%
- Less time away from home and family: 83%
- Special rewards for drivers: 84%
- Efforts to change perceptions and promote the benefits: 79%
- Trucks with high-tech equipment: 79%
- Design ergonomic truck cabins: 71%
- Lower the cost to obtain the professional driver license: 69%

5 point scale: Very important (5), Important (4), Moderately important (3), Slightly important (2), Not important at all (1)

Source: IRU survey 2018, Truck Driver Shortage – The view from the frontline.
2. Innovative solutions to better attract and retain truck drivers
2023 IN FIGURES

**TURNOVER**
- 583M€

**R&D+i**
- 10,2%

**EMPLOYEES**
- 5,300

**FLEET**
- 2,950 Trucks

**KM**
- +460M km/Year

**CAGR**
2020-2023 = 8%

Adrián Valverde
R&D – ESG Manager
Be part of the change
STUDENTS
- Unemployed or in search of new jobs and challenges
- Advanced and continuous training (Safety and ecodriving)
- Salary and gender equality

BE DRIVER APP
- Theoretical training and resolution of doubts 24/7
- Financial aid ad-hoc
- Tuition and fees for theoretical and practical training
- Direct job placement

DRIVING SCHOOLS
- Practical training agreement across Europe
- Practices with maximum time, cost, and quality defined

TRANSPORT COMPANIES
- Direct labor insertion anywhere in Europe
- Training profile adapted to company needs
- Mandatory continuing training for drivers
- Reduction of days away from home due to geopositioning of drivers
- Decent salary and conditions

BeDriver.com
Be part of the change
main issues
Fatigue & Accidents
Safe, efficient, pleasurable

Designed to enhance the driver experience
Today

Less freedom & lower status

- Supervised & controlled
- No longer “King of the road”
Truckfly

www.truckfly.com
The Truckfly app

The application that improves the quality of life and working conditions of road drivers.

In the vast world of transport, where every second counts and every stop must be optimized, Truckfly presents itself as the essential co-pilot for road drivers.

More than just an app, Truckfly is a driving companion that understands the unique challenges truck drivers face.

With one click, they can locate cozy restaurants for a well-deserved break, gas stations to refuel, safe parking, be informed of highway alerts, to rest and even doctors in case of emergency.

Truckfly is not just a tool, it is a revolution that redefines the journey for truck drivers, making every journey safer, more comfortable and more efficient.
An active community in 44 countries

“The star of apps remains TruckFly” L’Officiel des transporters – Sept 2021

“I love this app, it serves me well” Vincent T - Trucker

« One of the best apps ever. » Matthias V - Trucker

Downloads
800 000

Number of users
330 000

Number of points of interest
80 000

Available in
44 Countries in Europe

Available in
21 languages

4.6/5 (6k reviews)

4.8/5 (1k newspaper)

www.truckfly.com
Continuous learning

Human factor

Designed to fit the human capabilities and limitations

Observe -> Synthesize -> Ideate -> Prototypes -> Ideas -> Design & Deliver

User Tests

context

Human factor

Designed to fit the human capabilities and limitations
Maximize your recruiting potential with Truckfly, the interface dedicated to connectivity between carriers and drivers.

A Solution to the Growing Shortage: Faced with an urgent need - 40,000 vacant positions in France, 400,000 in Europe, and a projected deficit of 2,000,000 by 2026 according to the IRU.

We have launched a unique recruitment platform in collaboration with transport companies:

- **Jobposting**: Post your job offers directly to the heart of our vast community of drivers.
- **Specialized CV Library**: Dive into our directory of 12,000 up-to-date CVs, all from drivers who have been actively looking for less than a month, thus optimizing your chances of finding that rare gem.
- **Employer Brand**: Highlight your company, illustrate your values, and attract talents looking for a corporate culture aligned with their aspirations.
OUR INNOVATIVE MINDSET

- 1.4 Average fleet years (Improving efficiency + Safety)
- 12% women drivers and office employees
- 85% times x2 drivers per truck
- -30% GhG emissions reduction since 2015 (Lean and Green 2nd Star)
  - Energy mix: Euro VI, HVO, 100% Electric and LNG
- All tractors and reefers connected with latest real time technology and remote diagnosis connected in real time with workshops across Europe
- Continuous training and e-formation
- Payment and gender policy equality
Technological tools designed for carriers’ productivity

Thomas Larrieu
CEO at Upply
Technology at our fingertips

3 BENEFITS OF DIGITISATION FOR DRIVERS & TRANSPORT COMPANIES

1. Automated Administrative Tasks
Digital tools automate routine tasks, from managing e-CRM to capturing and sending proof of delivery (POD).

2. Real-Time Information and Support
Drivers gain instant access to key details and direct communication with dispatchers. This integration enhances efficiency, reduces stress, and supports a smoother driving experience.

3. Leveraging Technology for Business Growth
Digital platforms provide small carriers with visibility and control. They can find new clients, access freight searches, and negotiate prices directly, turning their smartphones into powerful business tools.
Damian Penney
Vice President EMEA, Lytx
EFFICIENT DRIVING PROGRAM

Remote Diagnosis-Preventive & Predictive Maintenance

Improvement of our process development with the world's most advanced TMS in logistics and transportation.

Drivers Ranking

- Emissions reduction (ECO-DRIVING)
- Road safety

+3000 simulation hours
+3700 drivers
Official development with OEMs
-150 Ton CO2/año
-18% Carbon footprint

DAF
SCANIA
Mercedes-Benz
Volvo

EDUARDO DE OLIVEIRA
ANTONIO JOSE NUNES OLIVEIRA
JOSE ANTONIO RIBEIRO LEITAO
NUNO FREDERICO DE PAIVA ALVES
The user
of the future
Interested in joining a network of over 170 members to shape the future of road transport?

Looking for a tailored partnership to boost your company’s footprint in the industry?

Need advice to better understand logistics market trends to support your decision-making and better address regulatory, business and operational opportunities or issues?

If you want to contact us:
information@iru.org

Contact us
### OTHER RELATED IRU INTELLIGENCE BRIEFINGS

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<td>Exec. summary (Freight; Passenger)</td>
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Also available for road passenger transport