TruckingHR Canada

2024-2030
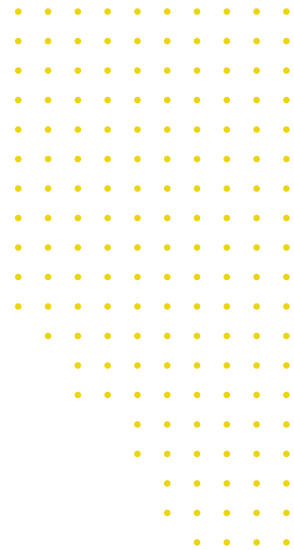
ALBERTA

Labour Market Report

Alberta's Trucking and Logistics Industry 2024–2030

Note to readers

Trucking HR Canada is the most trusted source for labour market information about the trucking and logistic sector. Labour market information (LMI) is actionable intelligence pertaining to the supply and demand of labour. It puts raw data into context and facilitates better decisions by employers, workers, job seekers, policymakers, educators, career practitioners, academics, students, parents, and more.

Our robust and accurate LMI is prepared by our team of analysts using customized data drawn from Statistics Canada's Census, and Labour Force Survey information. Our methodology also includes qualitative and quantitative research from employers to fill gaps in the publicly available data.

We produce national LMI every quarter and conduct regional reports upon request.

Introduction

Trucking HR Canada developed this report to showcase the latest available data on Alberta's labour market realities. It contains detailed insights on:

- ✖ employment, unemployment, and vacancies by occupation

- ✖ workforce demographics in trucking and logistics

- ✖ forecasts to 2030 for key labour market indicators including demand, supply, and labour gaps across the sector and for selected occupations

- ✖ where possible, comparisons between labour market conditions in Alberta and Canada

Read on to explore key findings from the study, including:

- ✖ Employment is on the rise. Labour supply in the Alberta trucking and logistics sector increased by 5.3%, but the demand for workers increased even more — by 20% from 2019 to 2023.

- ✖ Changing demographics. The number of women and workers under 35 in non-driving occupations is steadily growing, and the truck driver workforce continues to age faster than the province's overall workforce.

- ✖ New concerns and challenges are shaking up Alberta employers' priority lists and HR strategies. Rising input costs replace the driver shortage as the top concern, though recruitment, retention, and training of truck drivers remains a key challenge.

- ✖ Alberta drivers out-earn the national average, but employers believe it takes more than high wages to retain staff. Benefits, work-life balance, and simplified compensation systems emerge as top strategies.

Methodology

This report uses primary and secondary data to analyze labour market conditions, workforce demographics, and evaluate critical labour shortages[1]. Trucking HR Canada receives monthly custom data tables from Statistics Canada's Labour Force Survey and has customized census data tables with employment and demographic data for 2016 and 2021[2]. This data is supplemented with information from the Survey of Employment, Payroll and Hours (SEPH) and the Job Vacancy and Wage survey (JVWS). In addition, this study uses the primary data collected from Alberta-based employers during our 2019, 2021, and 2023 national employer surveys.

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[1] This report follows standard practices in measuring labour shortages as the gap between labour supply and demand. Note that this method may understate the true labour shortage because it assumes that all unemployed workers (those who are actively seeking work in a particular occupation or industry) are readily employable in the vacant positions. There may be a variety of reasons that an individual is not suitable for a specific job including, among others, geographic location, insufficient credentials, or lack of relevant experience.

[2] Our custom LFS and Census data tables contains 37 distinct six-digit National Occupational Classification codes (NOCs), eight specialized NOC groupings and 21 two- and three-digit North American Industrial Classification System (NAICS) codes as well as three customized NAICS groupings.

Context

This Alberta trucking and logistics LMI study was undertaken in mid-2024 when the most recently available annual labour market data from official sources[3] was for 2023. Many key indicators discussed in this report show significant easing of the labour market tightness in 2023 compared to 2022. Extreme labour pressures in 2022 reflect the extraordinary economic impacts observed in the post-pandemic era, when most G7 economies were facing record-high inflation rates, low unemployment rates, and burgeoning job vacancies. In June 2022, Canada's inflation rate hit 8.1%, its unemployment rate fell to 4.9% (a low not seen since the late 1960s and early 70's) and the number of job vacancies topped one million positions. Wages climbed throughout 2022, indicating that many sectors were feeling the pinch of labour shortages and using every tool at their disposal to compete for workers.

To cool the overheated labour market and bring inflation under control, Canada implemented a variety of responses, including increasing interest rates and modifying immigration policies. While this study does not attempt to measure the effectiveness of these policy adjustments, they are an important context for labour market trends in Alberta's trucking and logistics sector. The 2023 data included in this report reflects a cooling-off period in which the national inflation response began to impact provincial economies across the country, including Alberta's. The forecasted data provided for 2024-2030, by contrast, reflects expectations about how Alberta's labour market will behave in the future as the economy normalizes and trends in the supply and demand for workers hew closer to the true needs of the many industries that rely on Alberta's trucking sector.

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[3] For example, Statistics Canada's Labour Force Survey (LFS) and Job Vacancy and Wage Survey (JVWS)

Overview of Alberta's trucking and logistics sector

Alberta's core trucking and logistics industries[4] are dominated by small enterprises

According to Statistics Canada's Canadian business counts data[5], Alberta's core trucking and logistics industries are comprised of over 28,360 establishments, including those with and without employees. Approximately 68% of Alberta's core trucking and logistics establishments are businesses "without employees" — meaning many are sole-proprietorships or owner-operators. Another 27% have fewer than 10 employees. Only about 5% of these companies have 10 or more employees and only 42 of these establishments or 0.1% have 200 or more employees.

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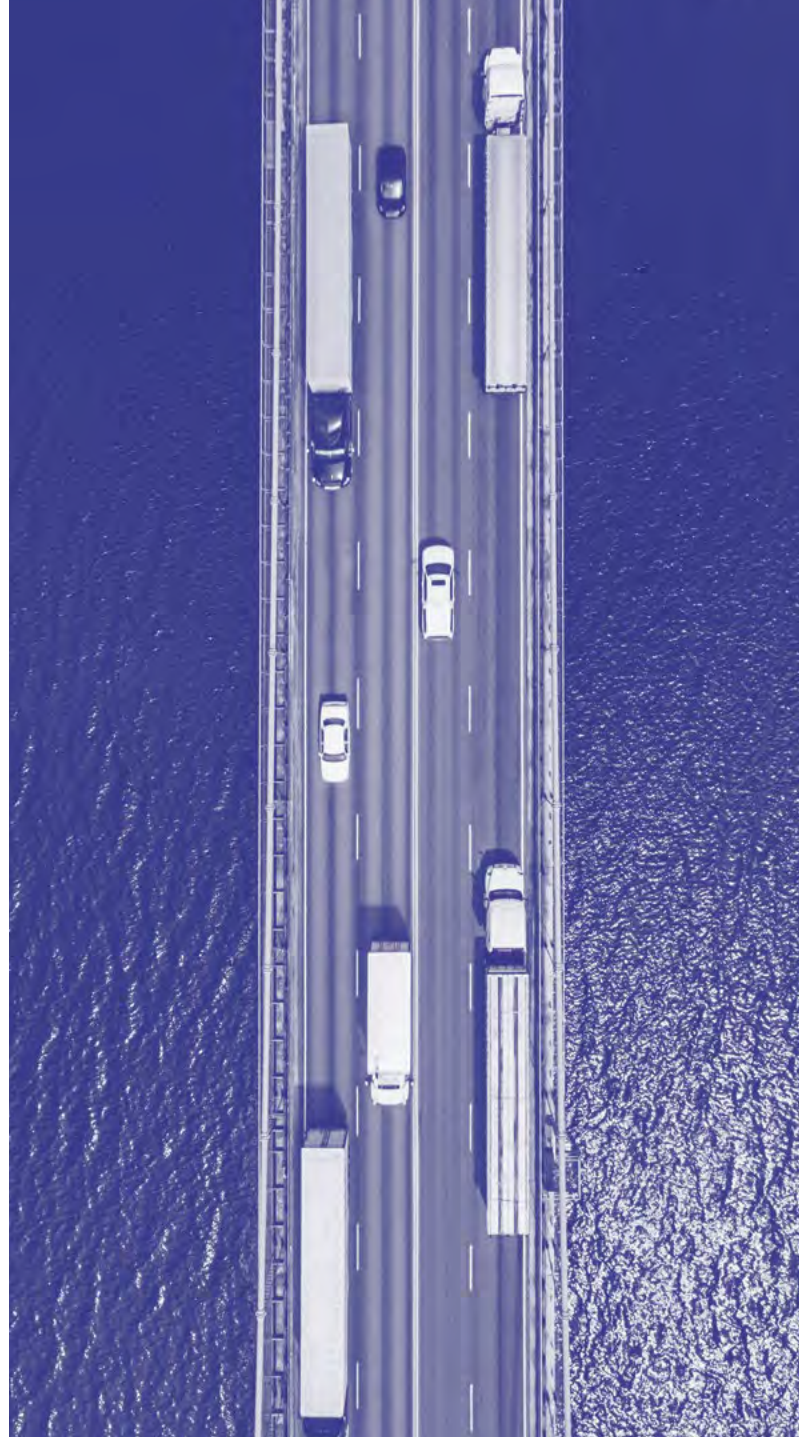
[4] Trucking HR Canada's definition of the "core" trucking and logistics industry includes NAICS 484 Truck Transportation, NAICS 488 Support for Transportation, NAICS 492 Messengers and Couriers and NAICS 493 Warehousing and Storage

[5] Source: Statistics Canada. Table: 33-10-0806-01 Canadian Business Counts, with employees, December 2023 and Table 33-10-0807-01 Canadian Business Counts, without employees, December 2023

Trucking and logistics is a backbone sector, supporting growth across Alberta's economy

Over the past decade, the four core industries that make up Alberta's core trucking and logistics sector have contributed an average of $6.4 billion or 2% to provincial GDP. See Figure 1.

FIGURE 1: GDP OF CORE TRUCKING AND LOGISTICS INDUSTRIES ALBERTA, 2014 – 2023

- Truck transportation
- Support activities for transportation
- Couriers and messengers
- Warehousing and storage
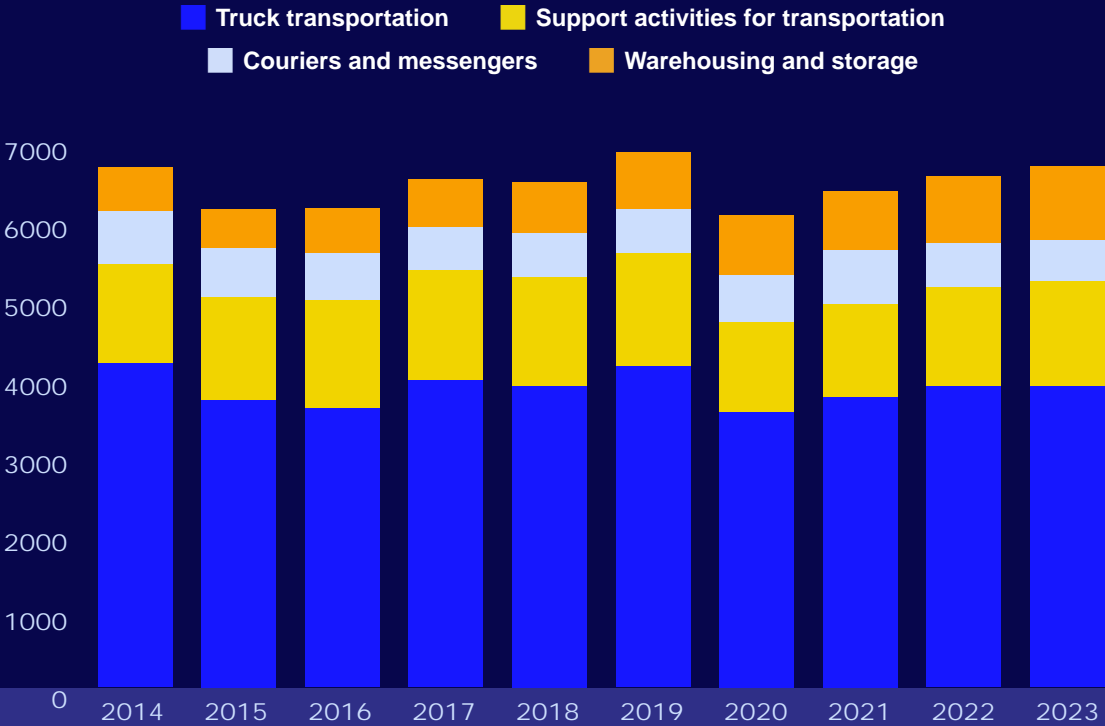
Source: Statistics Canada, Table: 36-10-0402-01, Gross domestic product (GDP) at basic prices, by industry, provinces and territories (x 1,000,000), Chained (2017) dollars

Transport truck drivers, in particular, support not only the core trucking and logistics industries but also many other sectors of Alberta's economy. In fact, transport truck drivers are employed in sectors as wide-ranging as construction, mining, oil and gas, retail and wholesale trade, manufacturing, and waste management services. See Figure 2.

FIGURE 2: EMPLOYMENT OF TRANSPORT TRUCK DRIVERS BY SECTOR, ALBERTA

- Trucking — General freight 40%
- Trucking — Specialized freight 14%
- Mining, oil and gas 9%
- Construction 8%
- Other 8%
- Wholesale/retail trade 7%
- Waste management 3%
- Manufacturing 3%
- Couriers and messengers 3%
- Support activities for transportation 2%
- Agriculture, forestry, fishing and hunting 2%
- Warehousing and storage 1%
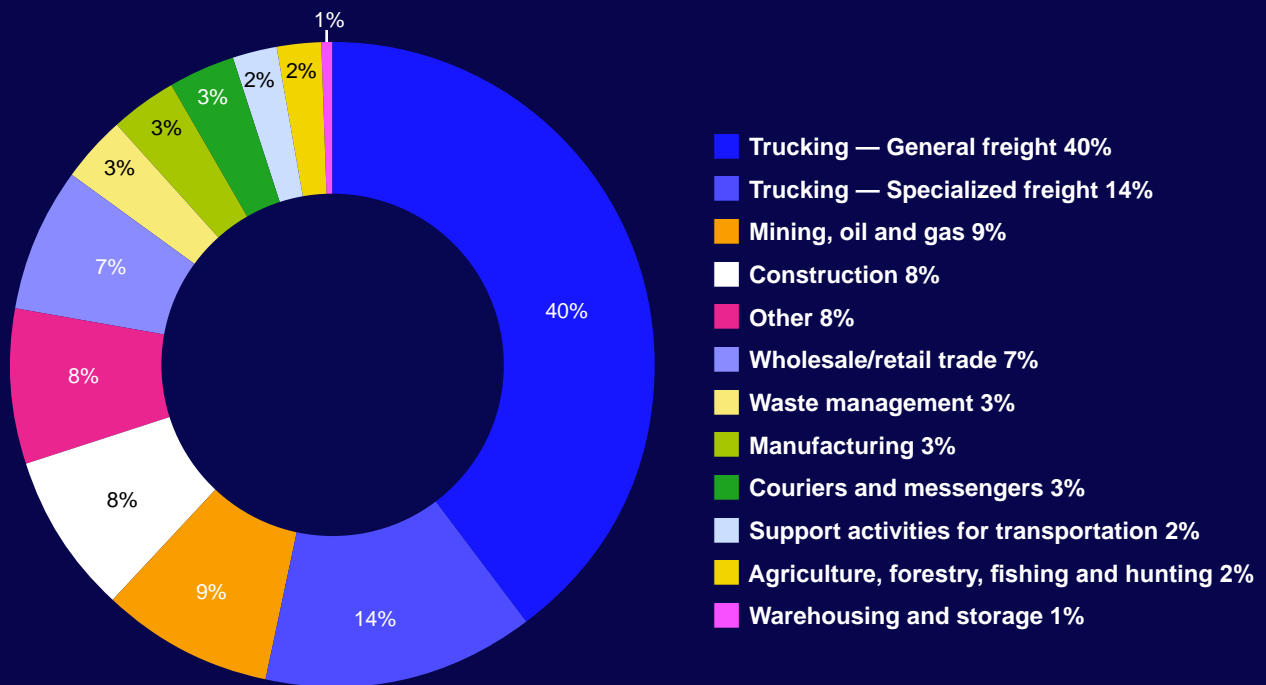
Source: Trucking HR Canada, Statistics Canada, Census 2021, special data request

Employment in trucking and logistics increased sharply in the last five years, while unemployment has been volatile and on the rise in 2023

Despite the many challenges associated with the COVID-19 pandemic, employment in Alberta's trucking and logistics sector increased steadily since 2019, reaching a 10-year record high in 2023 of 121,700 workers. This means the sector employed an additional 19,500 people, spiking by 19.1% over the five-year period. In 2023, Alberta accounted for 16.9% of Canada's trucking and logistics workforce.

At the same time, the sector's unemployment rate showed significant volatility, reaching a 10-year high in 2020 of 8.3%, a level not seen since 2016 when the unemployment rate in trucking and logistics reached 8.2%. Subsequently, the unemployment rate dipped to 3.5% in 2021 and 3.4% in 2022 before rising in 2023 to 4.8%. Across Canada, the unemployment rate in the trucking and logistics sector stood at 3.6% in 2023, up slightly from 3.4% in 2022 and down from 4.7% in 2021. See Figure 3.

FIGURE 3: EMPLOYMENT ('000) AND UNEMPLOYMENT RATE (%) TRUCKING AND LOGISTICS SECTOR ALBERTA AND CANADA 2014 – 2023
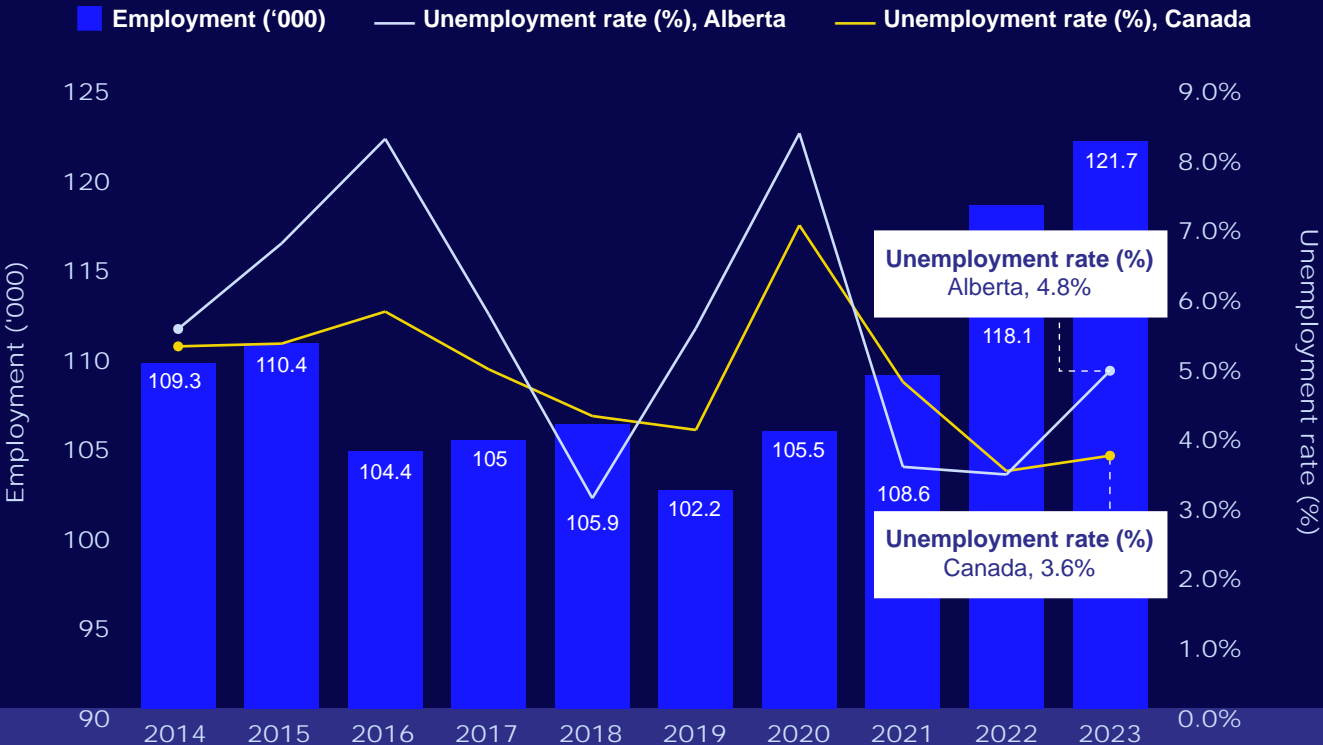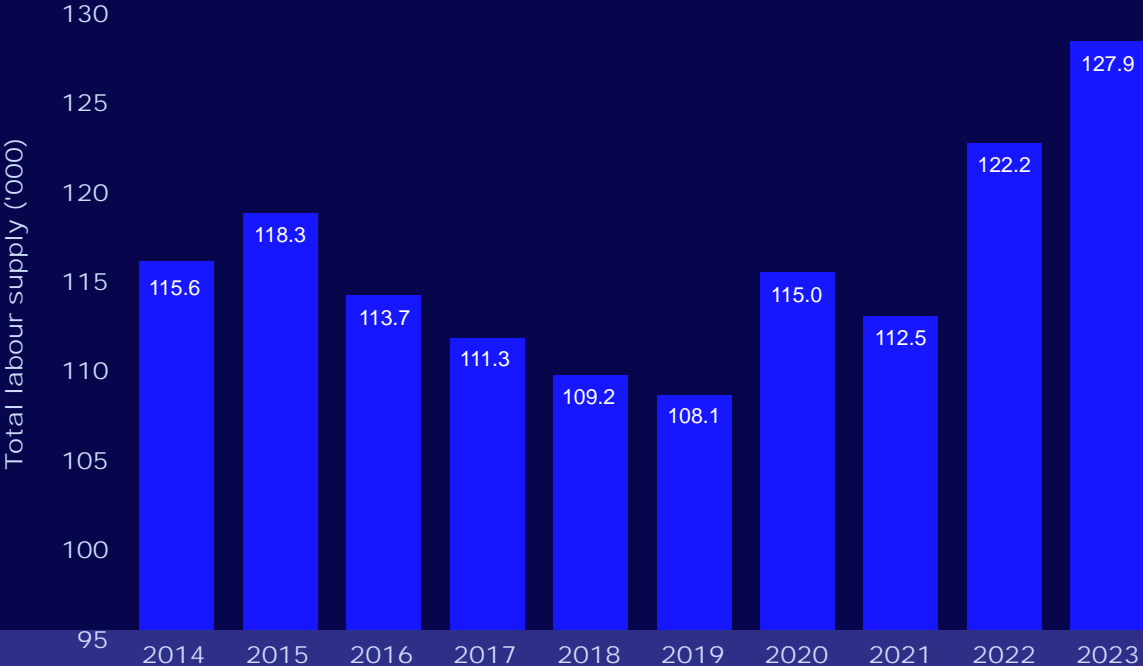
Source: Trucking HR Canada, Statistics Canada, Labour Force Survey, custom data request, 2023

Total supply of labour in trucking and logistics soared to record levels in 2023

With employment in Alberta's trucking and logistics sector at a 10-year high and unemployment on the rise, 2023 saw the total labour supply for the sector increase 18.3% over 2019, rising from 108,100 in 2019 to almost 128,000 in 2023, the highest in a decade. See Figure 4.

In 2023, Alberta accounted for 17% of Canada's trucking and logistics labour supply.

FIGURE 4: TOTAL LABOUR SUPPLY ('000), TRUCKING AND LOGISTICS, ALBERTA, 2014 – 2023

Year	Total labour supply ('000)
2014	115.6
2015	118.3
2016	113.7
2017	111.3
2018	109.2
2019	108.1
2020	115.0
2021	112.5
2022	122.2
2023	127.9

Source: Trucking HR Canada, Statistics Canada, Labour Force Survey, custom data request, 2023

Vacancies in trucking and logistics decrease almost 20%; job vacancy rate cools after record highs in 2022

After a decline in the number of job vacancies in Alberta's trucking and logistics sector during 2019 and 2020[6], vacancies surged, peaking in 2022 as they did in labour markets across Alberta and Canada. The number of vacancies in Alberta's trucking and logistics sector reached 7,343 in 2022, accounting for 14.1% of all vacancies in the sector in Canada. In 2023, the number of vacancies decreased by 19.5% with just over 5,900 open positions in Alberta's trucking and logistics sector, accounting for almost 16% of sector vacancies across Canada.

The vacancy rate — the proportion of all jobs in the sector which are vacant — has been consistently higher in the trucking and logistics sector compared to the overall vacancy rate in Alberta over the past five years. In 2023 the vacancy rate in Alberta's sector was 4.6%, down from 5.9% in 2022 but higher than the overall vacancy rate of 4.1% in the province. At the national level the vacancy rate in trucking and logistics in 2023 was 4.7%, roughly the same as the provincial rate. See Figure 5.

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[6]   The number of vacancies in 2020 is estimated because Statistics Canada temporarily suspended the Job Vacancy and Wage Survey during the second and third quarter of that year, due to the COVID-19 pandemic.

FIGURE 5: NUMBER OF VACANCIES AND VACANCY RATE, TRUCKING AND LOGISTICS SECTOR AND ALL INDUSTRIES, ALBERTA, 2018 – 2023
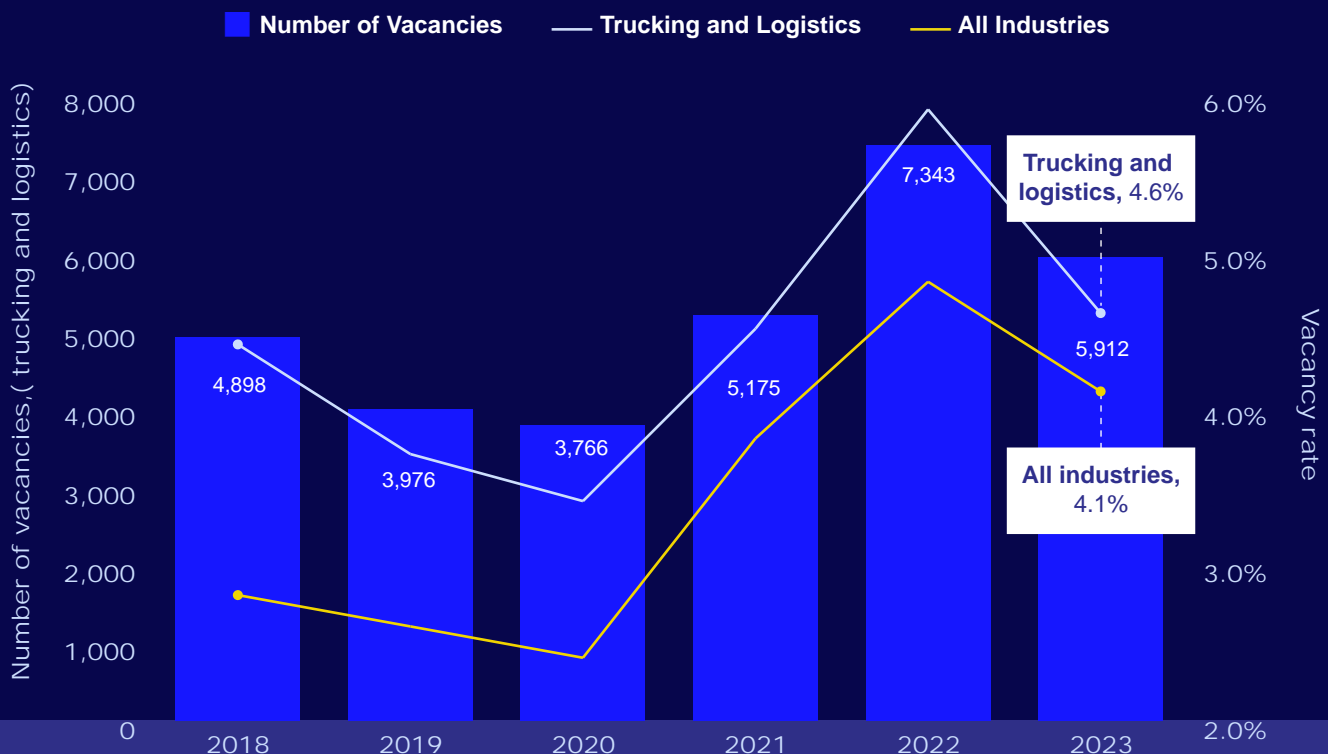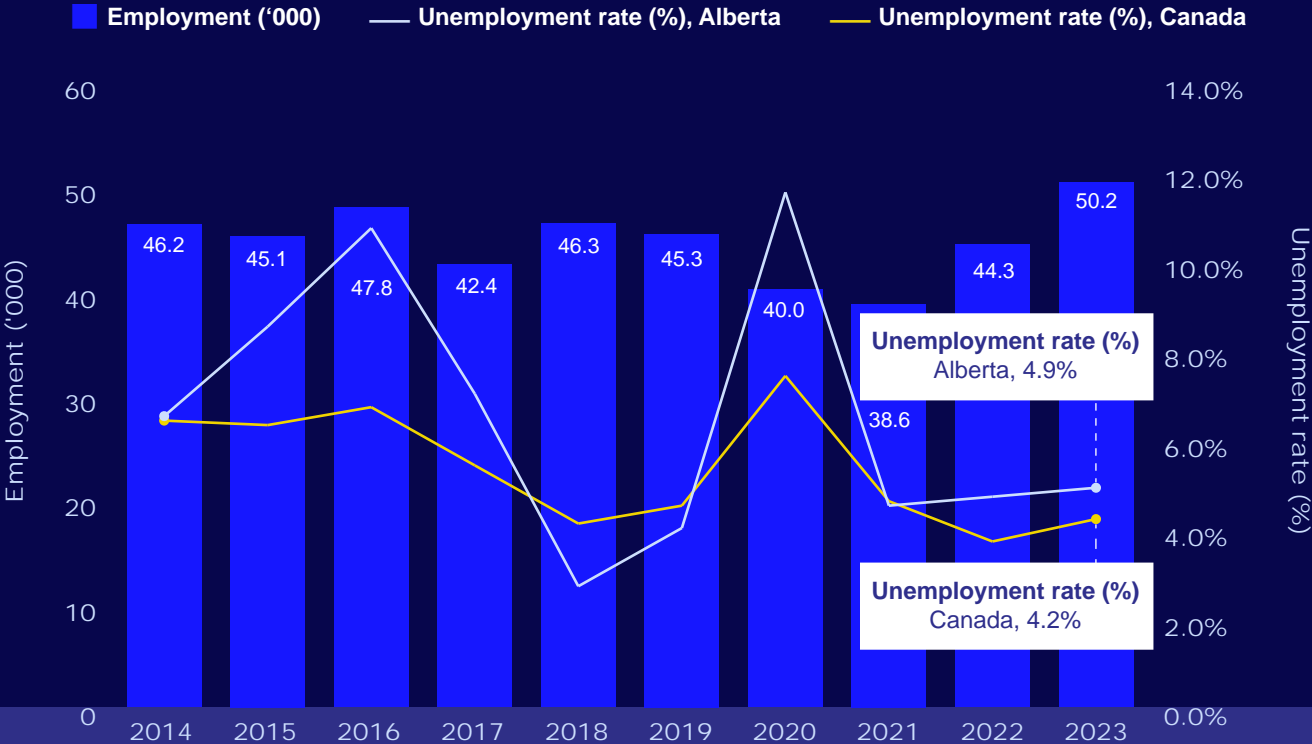
Source: Trucking HR Canada, Labour market outlook dashboard (adjusted) and Statistics Canada, Labour Force Survey, special data request, 2023

Employment of drivers hits a 10-year high while unemployment stabilizes post-pandemic

Employment of transport truck drivers in Alberta increased from a low of 38,600 in 2021 to a 10-year record high of 50,200 in 2023 — an increase of over 30% or 11,600 additional drivers hired over the two years. Over the past decade, Alberta accounted for 14.1% of all truck drivers employed in Canada.

The unemployment rate of transport truck drivers in Alberta dropped dramatically from 2020 and has remained stable in the post-pandemic period, measuring 4.9% in 2023. At the national level, the unemployment rate of transport truck drivers was 4.2% and was less volatile over the past decade than in Alberta. See Figure 6.

FIGURE 6: EMPLOYMENT ('000) AND UNEMPLOYMENT RATE (%) TRANSPORT TRUCK DRIVERS, ALBERTA AND CANADA, 2014 – 2023
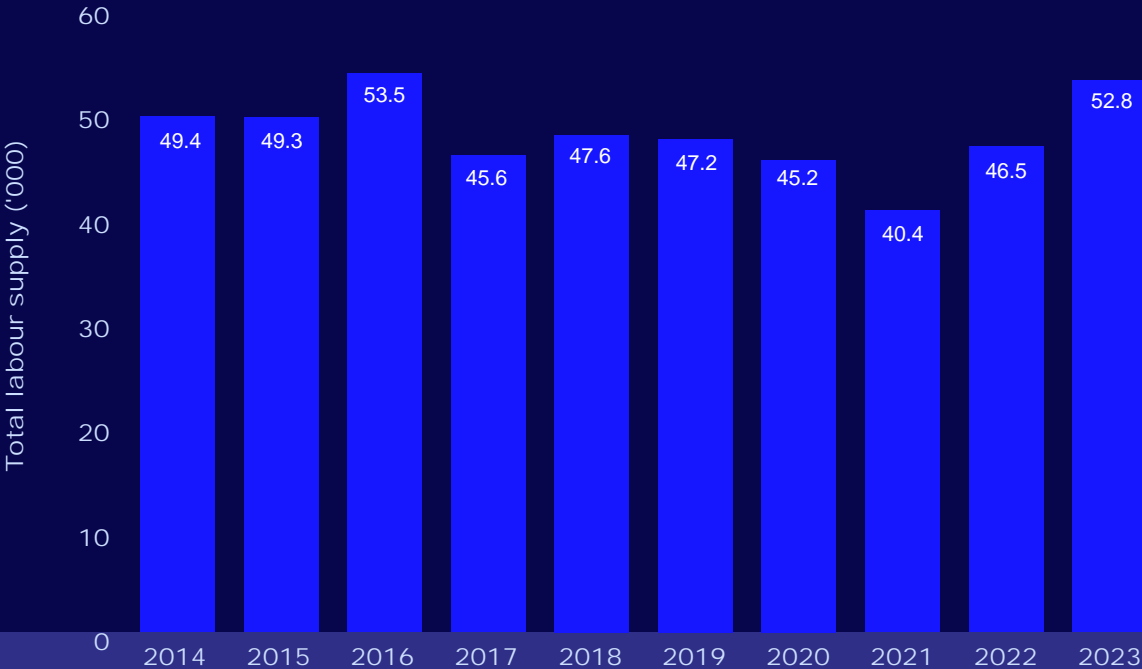

Source: Trucking HR Canada, Statistics Canada, Labour Force Survey, custom data request, 2023

Supply of drivers increases by almost 31% after a record low in 2021

Alberta's total supply of transport truck drivers increased by 12,400 drivers from 2021 to 2023, or 30.7% in two years. The province's total labour supply reached 52,800 in 2023, the highest level since 2016. With unemployment remaining mostly stable between 2021 and 2023, most of this increase in labour supply of drivers represents job creation in the province. See Figure 7.

Alberta accounted for 31% of Canada's supply of transport truck drivers in 2023.

FIGURE 7: TOTAL LABOUR SUPPLY ('000), TRANSPORT TRUCK DRIVERS, ALBERTA, 2014 – 2023

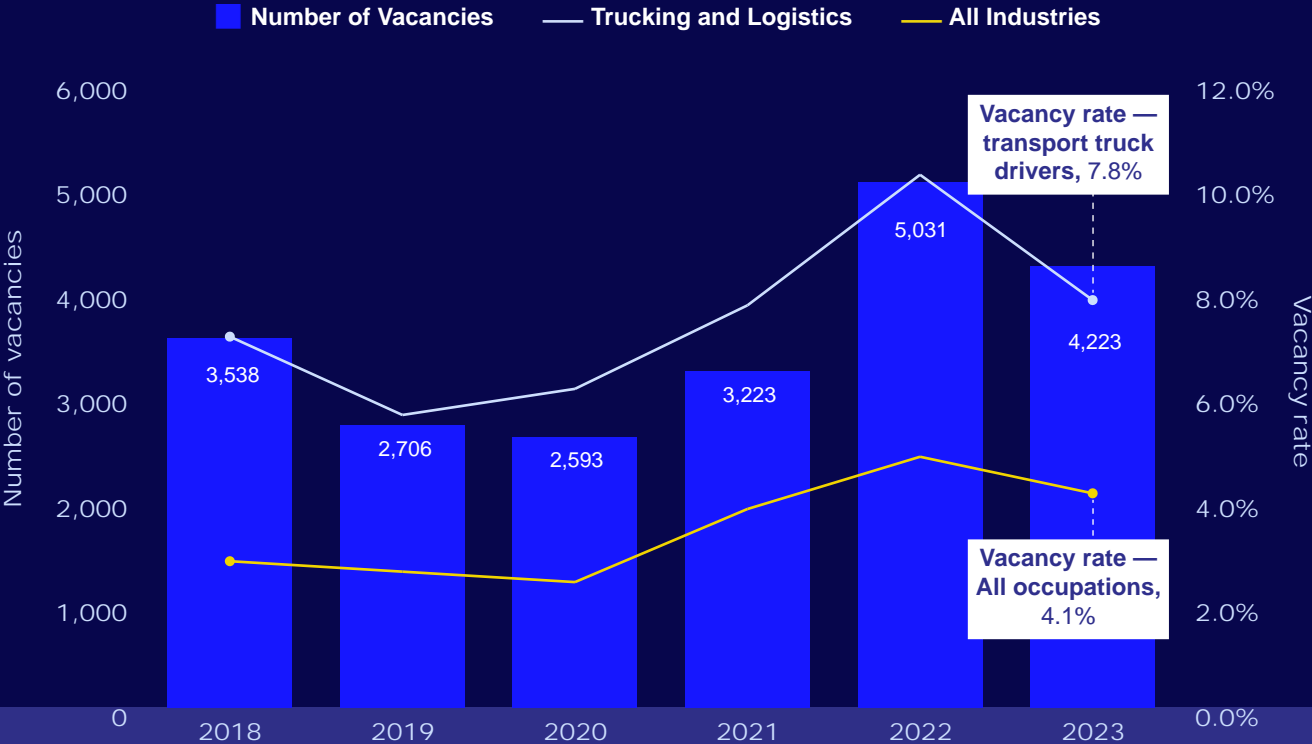| Year	Total labour supply ('000)
2014	49.4
2015	49.3
2016	53.5
2017	45.6
2018	47.6
2019	47.2
2020	45.2
2021	40.4
2022	46.5
2023	52.8

Source: Trucking HR Canada, Statistics Canada, Labour Force Survey, custom data request, 2023

Number of driver vacancies declines by more than 16% in 2023 but driver vacancy rate remains above national average

Job vacancies for transport truck drivers in Alberta fell to 4,223 in 2023 from a record high of over 5,000 in 2022, a decline of 16.1%. Alberta's truck driver vacancy rate was 7.8 %, compared to 4.1% for all occupations in Alberta's labour market in 2023. See Figure 8.

At the national level, the 2023 vacancy rate for transport truck drivers was 6.2%.

FIGURE 8: NUMBER OF VACANCIES AND VACANCY RATE TRANSPORT TRUCK DRIVERS AND ALL OCCUPATIONS, ALBERTA, 2018 – 2023

Legend:
- Number of Vacancies
- Trucking and Logistics
- All Industries

Data labels:
- 2018: 3,538
- 2019: 2,706
- 2020: 2,593
- 2021: 3,223
- 2022: 5,031
- 2023: 4,223

Vacancy rate — transport truck drivers, 7.8%

Vacancy rate — All occupations, 4.1%

Source: Trucking HR Canada, Statistics Canada, Table 14-10-0443-01 and Labour Force Survey, special data request, 2023

Demographics[7] of the trucking and logistics workforce

Number of women in non-driver trucking and logistics occupations increases by 2.5% per year but decreases in Alberta's overall workforce

Between 2016 and 2023, the proportion of women in the trucking and logistics workforce remained stable at 17% and 4% for transport truck drivers (NOC 73300). Across the provincial workforce the proportion of women employed also stayed steady at 47% between 2016 and 2021.

However, non-driver trucking and logistics occupations experienced a 13% uptick in the number of women employed between 2016 and 2021, with the addition of 1,635 female workers. At the same time the number of women employed in the province's overall workforce decreased 28,600 workers, a decline of 2.9% between 2016 and 2021. See Table 1.

At the national level, the trucking and logistics sector saw significant gains in the number of women employed with an average annual growth rate of 4.9% between 2016 and 2021.

TABLE 1

NUMBER OF FEMALE WORKERS ALBERTA, 2016 AND 2021	2016	2021	% CHANGE 2016-2021	ANNUAL % INCREASE
Drivers (NOC 73300 — Transport Truck Drivers)	1,880	1,870	-1%	-0.1%
Non-Driver Occupations	12,650	14,285	13%	2.5%
All Occupations, All Industries	981,745	953,140	-2.9%	-0.6%

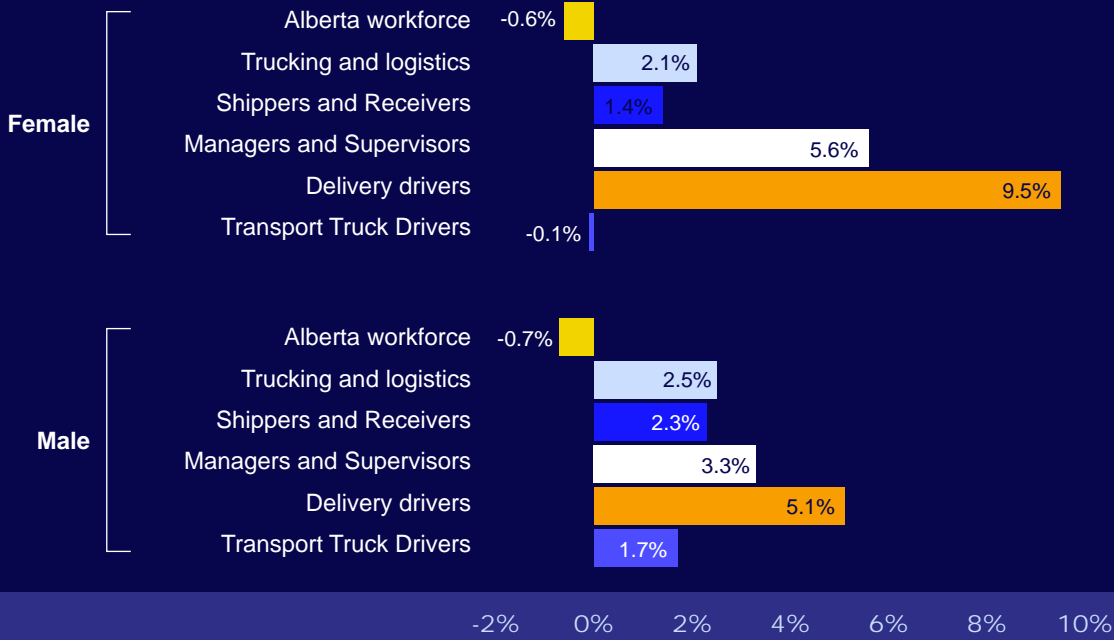Source: Trucking HR Canada, Statistics Canada, Census 2016 and 2021, special data request, 2023

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[7]   Trucking HR Canada's workforce demographics dashboard relies on custom data tables of census data from 2016 and 2021 (the most recently available census) and contains information about labour force status, sector of employment, age, gender, minority status, educational status.

Largest gains in employment of women occurred in delivery drivers and managers/supervisors

Although the number of female transport truck drivers stayed roughly the same between 2016 and 2021, an increase in the employment of women was seen in delivery and courier service drivers (NOC 75201), with more than 700 additional women working in the occupation, an annual average increase of 9.5% between 2016 and 2021. The number of female managers and supervisors also increased by 5.6% per year (175 women) from 2016 to 2021, and the number of women employed as shippers and receivers in in the sector increased by 190 between 2016 and 2021, an annual growth rate of 1.4%. See Figure 9.

FIGURE 9: AVERAGE ANNUAL % CHANGE IN EMPLOYMENT BY GENDER, ALBERTA, 2016 – 2021

Female

Alberta workforce	-0.6%
Trucking and logistics	2.1%
Shippers and Receivers	1.4%
Managers and Supervisors	5.6%
Delivery drivers	9.5%
Transport Truck Drivers	-0.1%

Male

Alberta workforce	-0.7%
Trucking and logistics	2.5%
Shippers and Receivers	2.3%
Managers and Supervisors	3.3%
Delivery drivers	5.1%
Transport Truck Drivers	1.7%

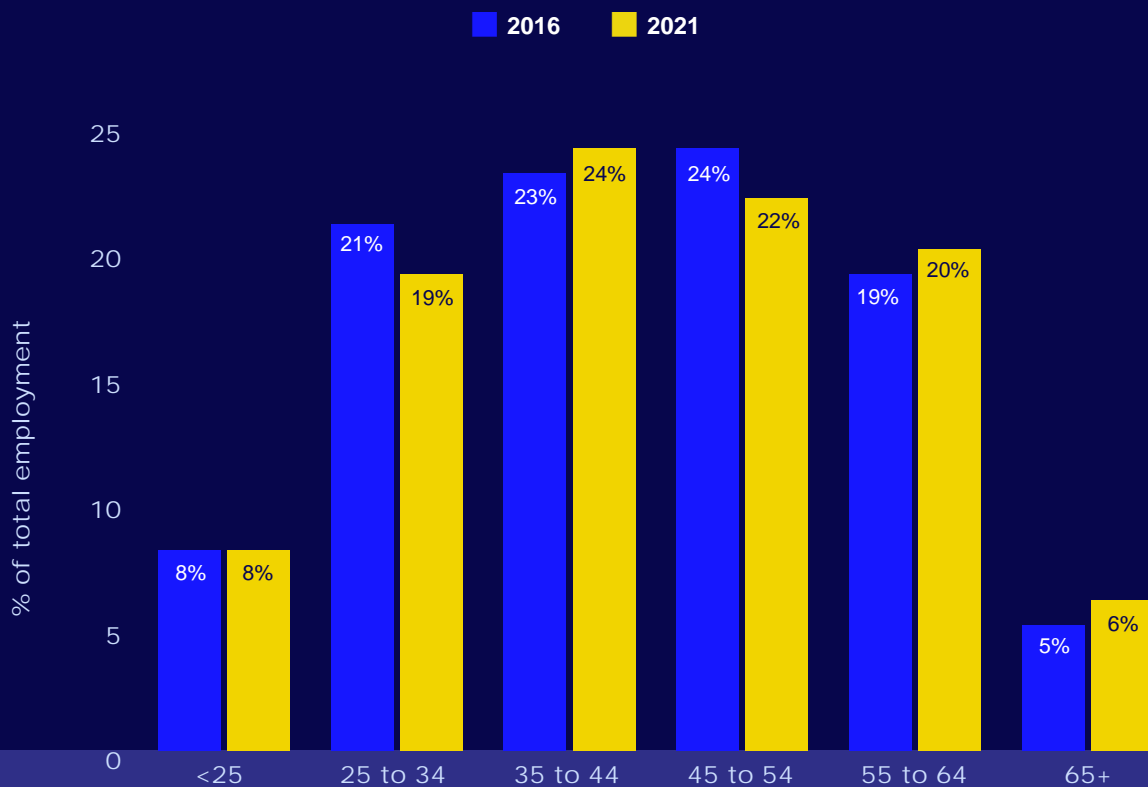-2%   0%   2%   4%   6%   8%   10%

Source: Trucking HR Canada, Statistics Canada, Census 2016 and 2021, special data request, 2023

Proportion of workers 55+ in trucking and logistics crept upward from 2016 to 2021

The proportion of workers aged 55 and older in Alberta's trucking and logistics industry edged higher from 24% to 26% between 2016 and 2021 while the percentage of employees under the age of 35 declined from 29% to 27% over the same period. See Figure 10.

FIGURE 10: EMPLOYMENT BY AGE GROUP, TRUCKING AND LOGISTICS ALBERTA, 2016 AND 2021

2016 **2021**

% of total employment

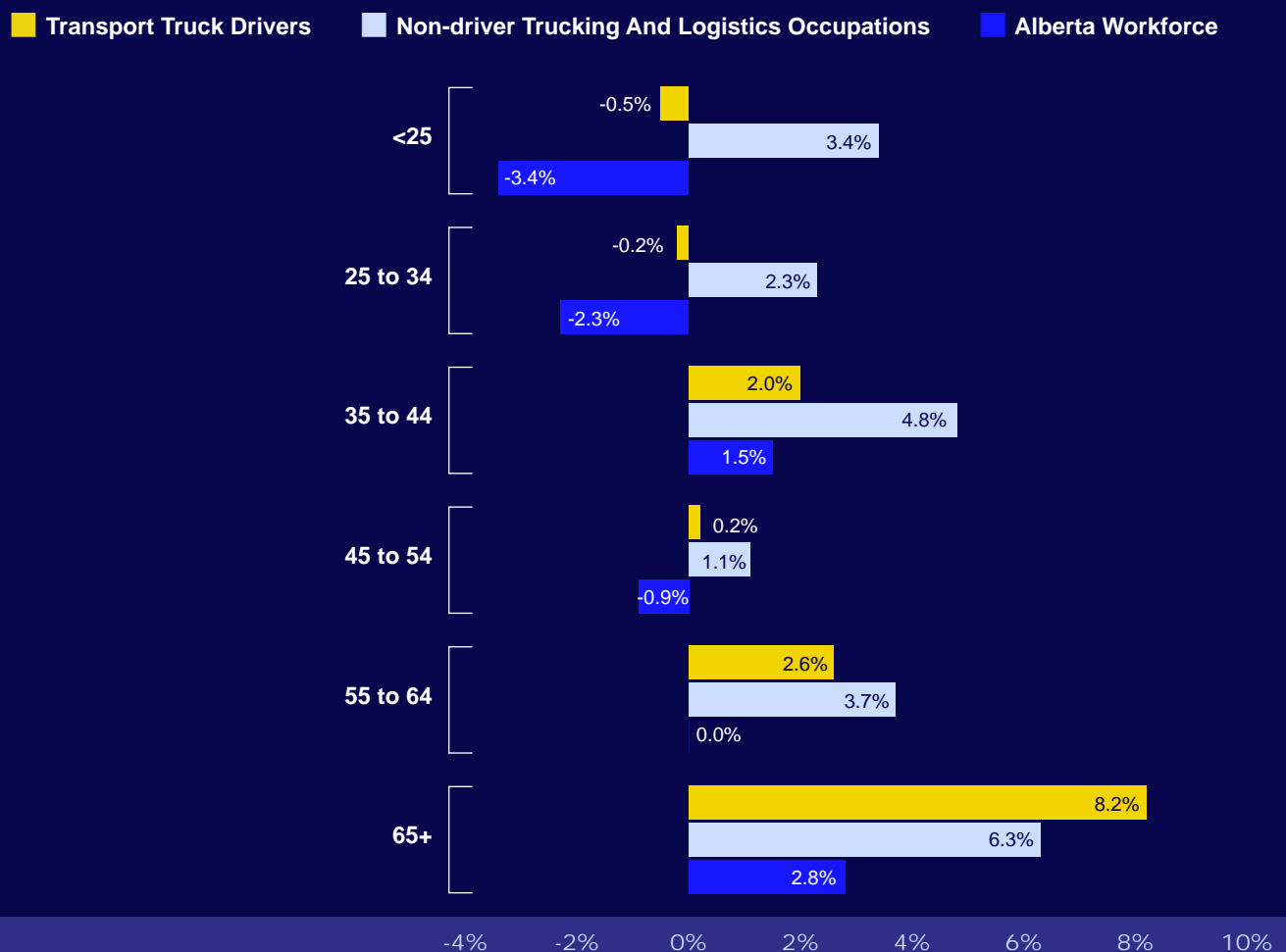| Age Group	2016	2021
<25	8%	8%
25 to 34	21%	19%
35 to 44	23%	24%
45 to 54	24%	22%
55 to 64	19%	20%
65+	5%	6%

Source: Trucking HR Canada, Statistics Canada, Census 2016 and 2021, special data request, 2023

Truck drivers aging faster than non-drivers but the number of young workers in non-driver occupations is growing faster than the provincial average

The number of transport truck drivers aged 65 years and older grew at an average annual rate of 8.2% between 2016 and 2021, compared to 6.3% in non-driver positions and only 2.8% in the provincial workforce. On the other hand, the number of workers under 25 in non-driver trucking and logistics occupations grew by 3.4% per year but stayed relatively stable in the transport truck driver occupation, decreasing by only -0.5% per year. Across Alberta's workforce the number of workers under the age of 25 decreased by -3.4% per year. See Figure 11.

FIGURE 11: AVERAGE ANNUAL % CHANGE IN EMPLOYMENT BY AGE GROUP, TRANSPORT TRUCK DRIVERS, NON-DRIVER OCCUPATIONS AND ALBERTA WORKFORCE, 2016 – 2021
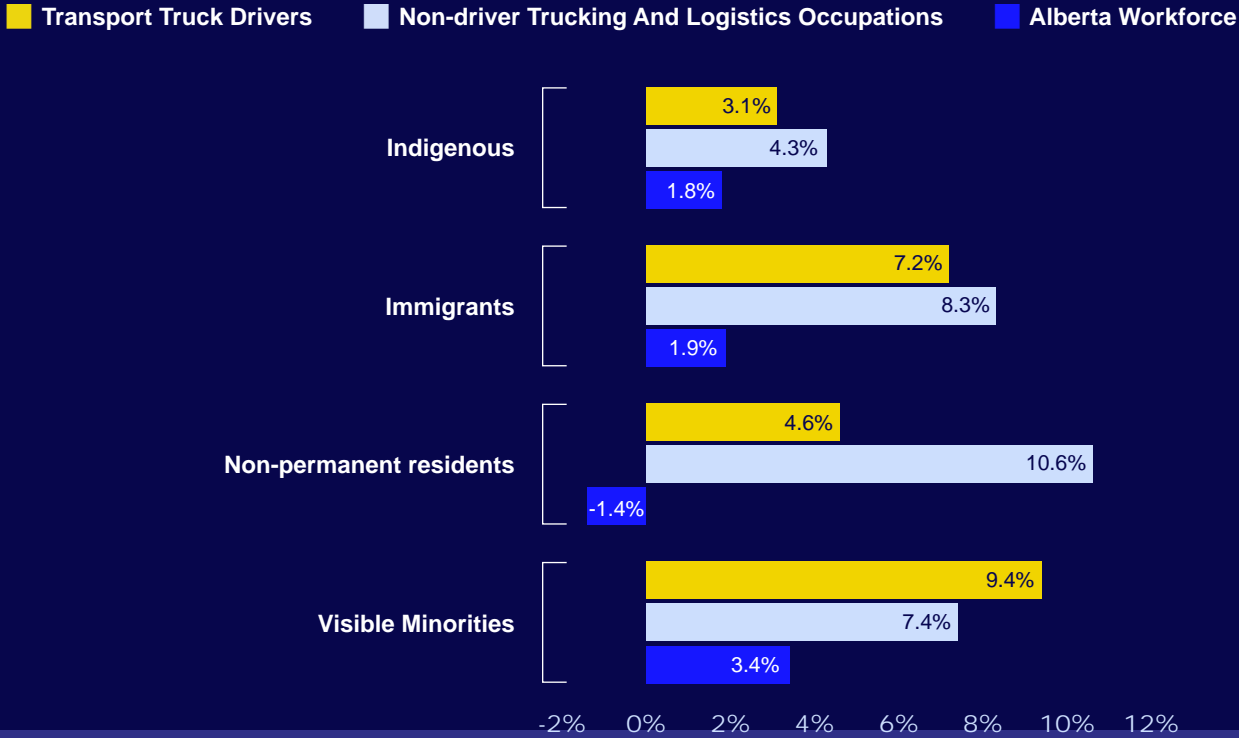
■ Transport Truck Drivers   ■ Non-driver Trucking And Logistics Occupations   ■ Alberta Workforce

Age Group	Transport Truck Drivers	Non-driver Trucking And Logistics Occupations	Alberta Workforce
<25	-0.5%	3.4%	-3.4%
25 to 34	-0.2%	2.3%	-2.3%
35 to 44	2.0%	4.8%	1.5%
45 to 54	0.2%	1.1%	-0.9%
55 to 64	2.6%	3.7%	0.0%
65+	8.2%	6.3%	2.8%

Source: Trucking HR Canada, Statistics Canada, Census 2016 and 2021, special data request, 2023

Employment of non-permanent residents grew in trucking and logistics but decreased across Alberta's workforce

The proportion of the trucking and logistics workforce from under-represented communities such as visible minorities, Indigenous people, immigrants, and non-permanent residents grew faster in trucking and logistics than it did in the province's overall workforce. The number of non-permanent residents employed as transport truck drivers increased by 5% per year between 2016 and 2021 and for non-driver occupations, employment of non-permanent residents grew by 11% per year. Across Alberta's workforce, the number of non-permanent residents decreased by 1% per year from 2016 to 2021. See Figure 12.

FIGURE 12: AVERAGE ANNUAL % CHANGE IN EMPLOYMENT, MINORITY COMMUNITY, 2016-2021

Legend:
- Transport Truck Drivers
- Non-driver Trucking And Logistics Occupations
- Alberta Workforce

Indigenous
- Transport Truck Drivers: 3.1%
- Non-driver Trucking And Logistics Occupations: 4.3%
- Alberta Workforce: 1.8%

Immigrants
- Transport Truck Drivers: 7.2%
- Non-driver Trucking And Logistics Occupations: 8.3%
- Alberta Workforce: 1.9%

Non-permanent residents
- Transport Truck Drivers: 4.6%
- Non-driver Trucking And Logistics Occupations: 10.6%
- Alberta Workforce: -1.4%

Visible Minorities
- Transport Truck Drivers: 9.4%
- Non-driver Trucking And Logistics Occupations: 7.4%
- Alberta Workforce: 3.4%

Axis: -2% 0% 2% 4% 6% 8% 10% 12%

Source: Trucking HR Canada, Statistics Canada, Census 2016 and 2021, special data request, 2023

How Employers' Outlook is Changing: Results From Trucking HR Canada's Employer LMI Surveys

As part of our national LMI updating and renewal program, Trucking HR Canada conducted a Canada-wide employer survey in 2023. A total of 40 surveys were completed in Alberta, representing almost 5,500 drivers.

Responses to the 2023 survey have revealed some significant changes in the data reported and the perspectives employers expressed in the pre-COVID (2019) and pandemic-era (2020 and 2021). This section focuses on the shifting problems, priorities, and practices.

Rising cost of inputs replaces driver shortage as top concern of Alberta employers.
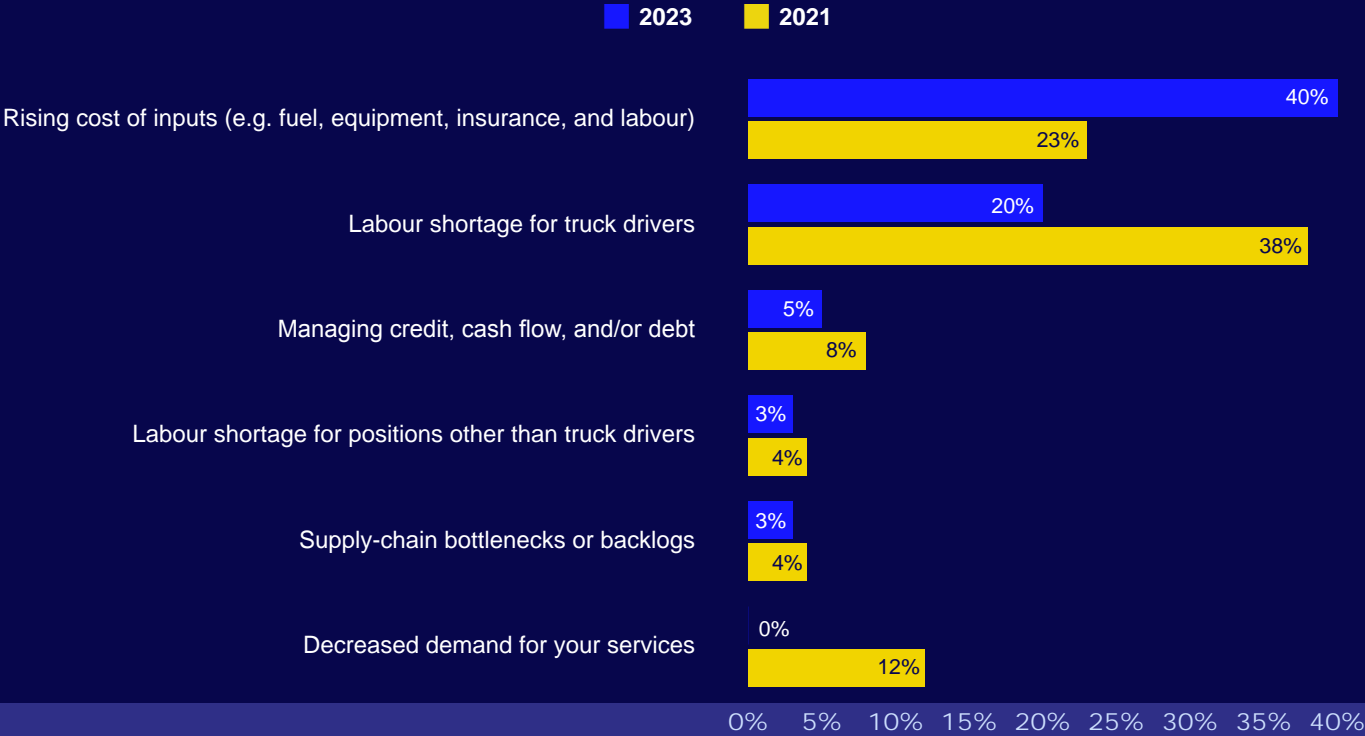
Respondents from Alberta indicated that their top concern for the next six months shifted between 2021 and 2023. In our 2021 survey, 38% of Alberta trucking sector employers indicated that their top concern centred on the driver shortage, but in 2023 this issue was selected by only 20% of respondents. Instead, the top concern among 40% of employers in Alberta's trucking and logistics industry was the rising cost of inputs such as fuel, equipment, insurance, and labour, up from 23% in 2021. See Figure 13.

Furthermore, 20% of respondents chose rising interest rates as a top concern in 2023[8].

[8]   Rising interest rates was not among the selection list in our 2021 survey.

FIGURE 13: TOP CONCERN OF EMPLOYERS OVER THE NEXT 6 MONTHS, ALBERTA, 2021 AND 2023

■ 2023   ■ 2021

Concern	2023	2021
Rising cost of inputs (e.g. fuel, equipment, insurance, and labour)	40%	23%
Labour shortage for truck drivers	20%	38%
Managing credit, cash flow, and/or debt	5%	8%
Labour shortage for positions other than truck drivers	3%	4%
Supply-chain bottlenecks or backlogs	3%	4%
Decreased demand for your services	0%	12%

0%   5%   10%   15%   20%   25%   30%   35%   40%

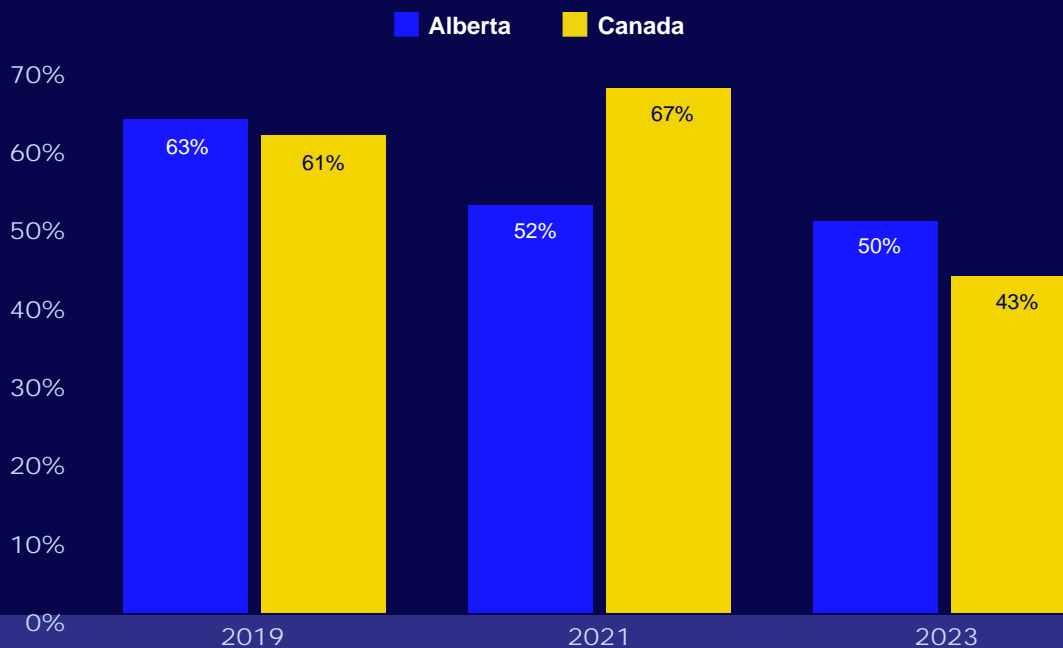Source: Trucking HR Canada, Employer surveys, 2021 and 2023

Half of Alberta employers still struggled to fill driver vacancies in 2023

While fewer employers reported the driver shortage as a top concern, half of all Alberta-based trucking and logistics employers still reported that they were unable to find all the drivers needed in 2023, compared to 52% in 2021 and 63% in 2019. See Figure 14.

Across Canada, 43% of employers reported being unable to find all the drivers needed in 2023, suggesting that Alberta's trucking and logistics labour market remains tighter than the rest of the country.

The top reason for being unable to fill all driver positions among Alberta employers was insufficient number of candidates with necessary experience (55%). Twenty-five percent said there was too much turn-over at their firm in a short period of time and 20% blamed rapid expansion.

FIGURE 14: PROPORTION OF EMPLOYERS UNABLE TO FILL ALL DRIVER POSITIONS NEEDED, ALBERTA AND CANADA 2019, 2021 AND 2023

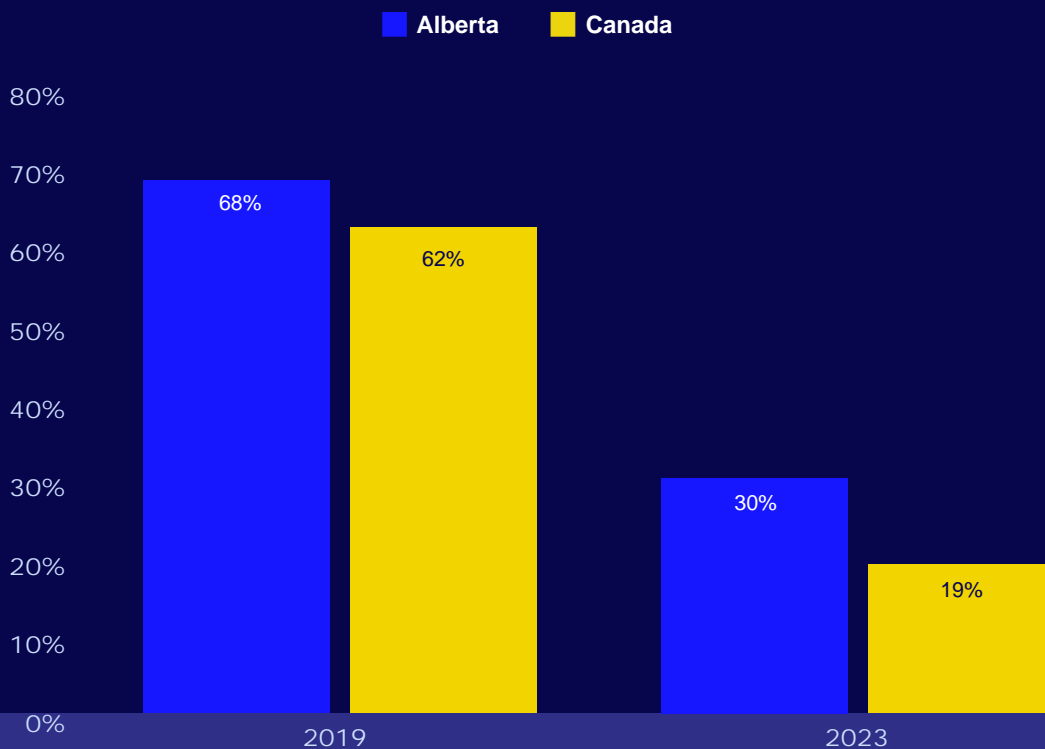Source: Trucking HR Canada, Employer surveys, 2019, 2021 and 2023

Fewer Alberta companies reported lost revenue from driver shortage but still more than the national average

In 2023, 30% of Alberta employers reported lost sales/revenue because they were not able to hire all the drivers needed. This is significantly lower than in 2019, when 68% of Alberta's employers reported that the driver shortage resulted in decreased revenue. See Figure 15.

At the national level, 62% of employers reported lost revenue because of the driver shortage in 2019, whereas only 19% of employers reported reduced revenue in 2023.

The top impacts of the driver shortage among Alberta employers in 2023 were increased stress among truck drivers to fill the gap (80%), increased stress among other employees to find alternative solutions (45%), overtime costs (44%), losing long-term customers to competitors (35%), and delayed or cancelled expansion (25%).

FIGURE 15: PROPORTION OF EMPLOYERS REPORTING LOST REVENUE AS A RESULT OF DRIVER SHORTAGE ALBERTA AND CANADA 2019 AND 2023

■ Alberta   ■ Canada

	2019	2023
Alberta	68%	30%
Canada	62%	19%

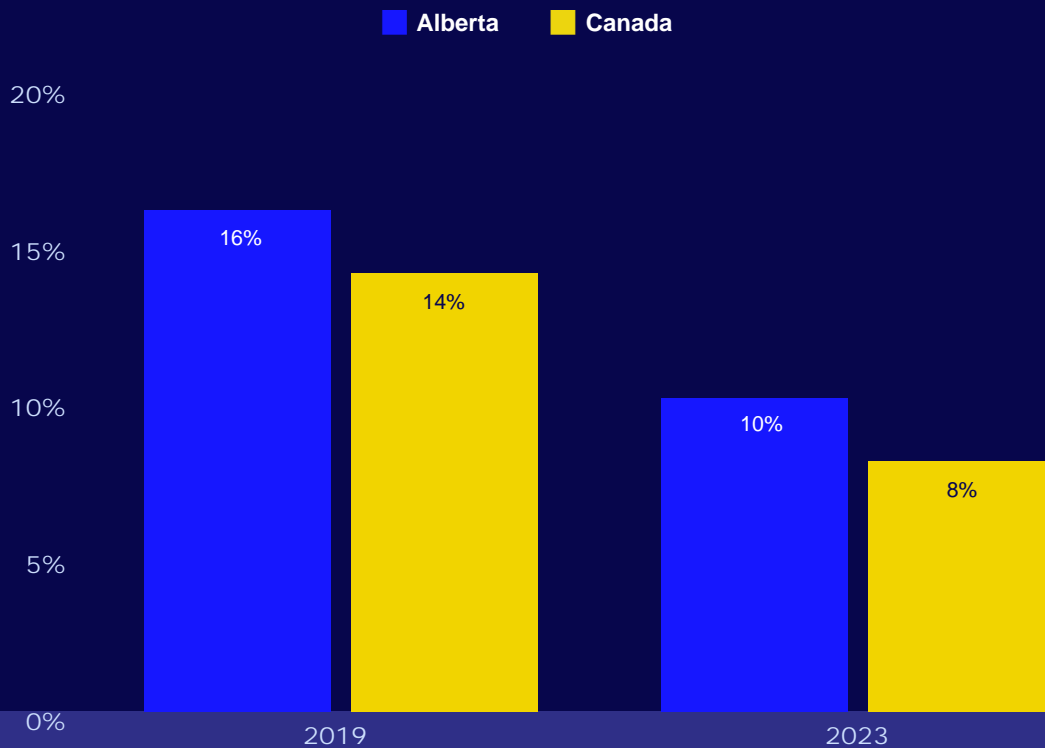Source: Trucking HR Canada, Employer surveys, 2019 and 2023

Voluntary turnover rate falls from 2019 to 2023 but Alberta's driver turnover remains above national average

In 2019, Alberta employers reported that voluntary turnover[9] at the firm level was 16%. This means about 16% of their firm's workforce was leaving for reasons other than retirement. In 2023, that

proportion decreased to 10%, a level of voluntary turnover still higher than the national average of 8%. See Figure 16.

[9] Voluntary turnover is employee-initiated departures other than retirement. It is sometimes referred to as avoidable or regrettable turnover. Our data refers to the turnover of drivers at each individual employer.

FIGURE 16: VOLUNTARY TURNOVER RATE, TRANSPORT TRUCK DRIVERS, ALBERTA AND CANADA, 2019 AND 2023
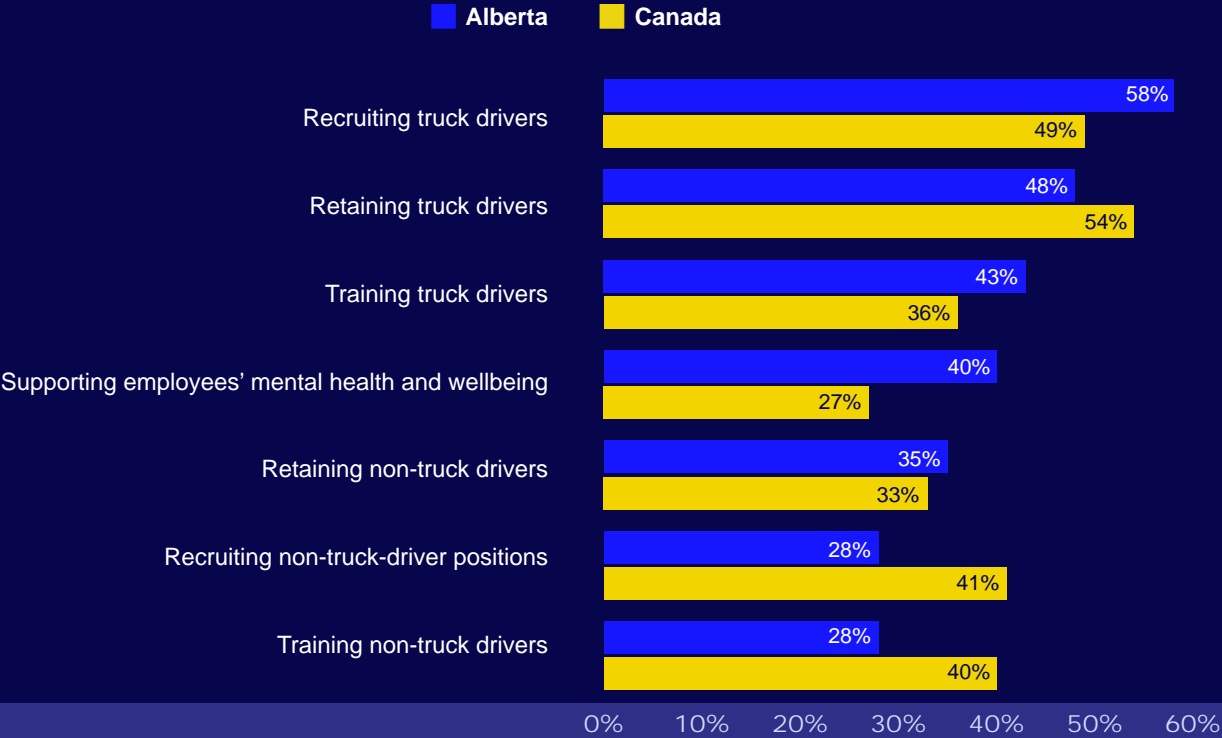

Source: Trucking HR Canada's employer surveys, 2019 and 2023

Most challenging HR issues: recruitment, retention, and training

Our 2023 survey asked employers about their biggest HR challenges in the coming six months. In Alberta, 58% of respondents said they anticipated recruiting truck drivers would be very challenging or extremely challenging. In addition, 48% said it was retaining drivers, and 43% said training drivers would also be very or extremely challenging. This contrasts with the national level survey results where a higher proportion of employers felt that retention (54%), rather than recruitment of drivers (49%) would be very or extremely difficult. Only 36% of employers across Canada felt that training truck drivers would be very or extremely challenging. Forty percent of Alberta employers said that supporting employees' mental health and wellbeing would be very or extremely challenging, compared to only 27% across Canada. See Figure 17.

FIGURE 17: OVER THE NEXT SIX MONTHS, HOW CHALLENGING DO YOU EXPECT THE FOLLOWING HR-RELATED TASKS TO BE FOR YOUR COMPANY? (% RESPONDING VERY OR EXTREMELY CHALLENGING)
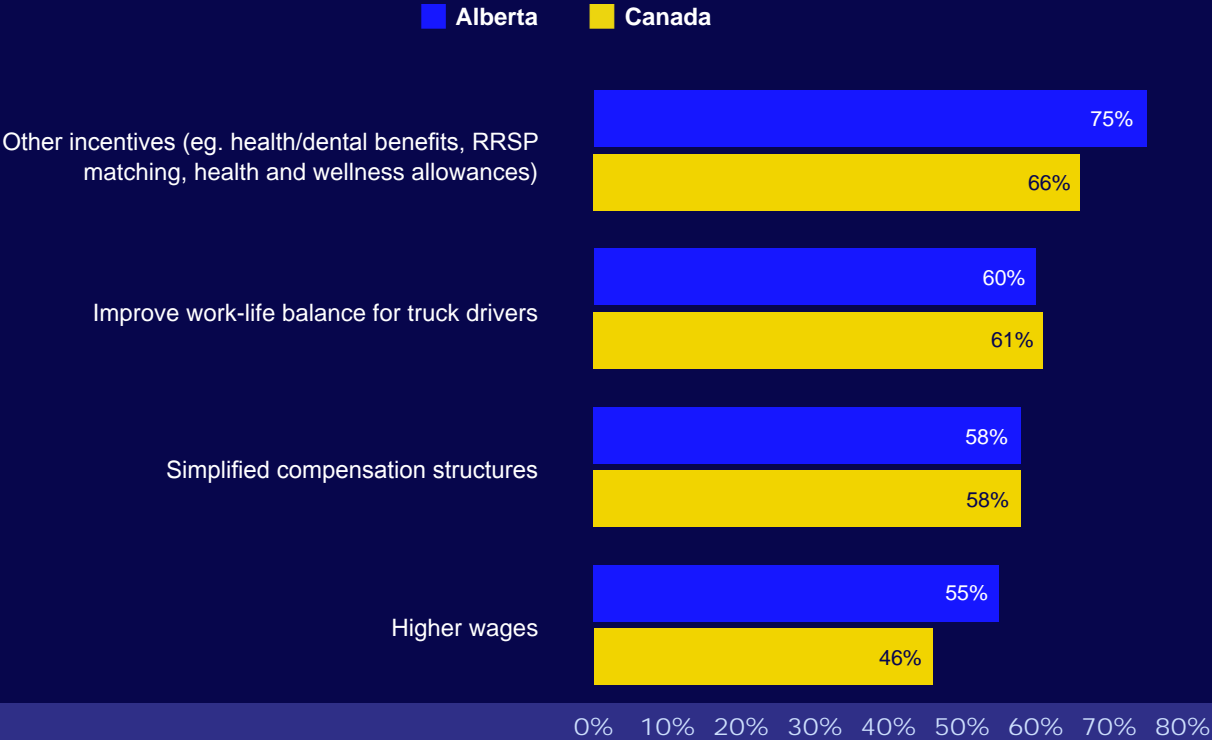
■ **Alberta**   ■ **Canada**

Task	Alberta	Canada
Recruiting truck drivers	58%	49%
Retaining truck drivers	48%	54%
Training truck drivers	43%	36%
Supporting employees' mental health and wellbeing	40%	27%
Retaining non-truck drivers	35%	33%
Recruiting non-truck-driver positions	28%	41%
Training non-truck drivers	28%	40%

Source: Trucking HR Canada, Employer survey, 2023

Incentives like benefits, work-life balance, and simplified compensation systems outweigh increased wages in attracting and retaining drivers

According to our 2023 employer survey, 75% of Alberta employers believe that providing drivers with incentives such as health/dental benefit plans, contributing to employee RRSPs, and offering health and wellness allowances will help most with recruiting and retaining drivers. In addition, improving work-life balance for drivers was selected by 60% of respondents and simplifying compensation structures was chosen by 58% of Alberta respondents. While 55% of Alberta employers believe that offering higher wages will be helpful, across Canada, less than half (46%) feel this strategy will support recruitment and retention of drivers. See Figure 18.

FIGURE 18: WHAT STRATEGY/PRACTICES HELP YOUR COMPANY THE MOST WITH RECRUITING/ RETAINING TRUCK DRIVERS? (SELECT ALL THAT APPLY)

■ Alberta   ■ Canada

Strategy	Alberta	Canada
Other incentives (eg. health/dental benefits, RRSP matching, health and wellness allowances)	75%	66%
Improve work-life balance for truck drivers	60%	61%
Simplified compensation structures	58%	58%
Higher wages	55%	46%

Source: Trucking HR Canada, Employer survey, 2023

Driver Compensation

Alberta employers pay drivers more: 8% higher for short-haul and 2% higher for long-haul

Our 2023 survey asked employers to estimate the average annual income of a truck driver at their company. It should be noted that the data collected does not allow us to distinguish between drivers who are employees and those who are owner-operators nor to differentiate income for experienced vs inexperienced drivers.[10] Alberta employers estimated that, on average, a long-haul driver's annual income is $67,372, 2% higher than the average annual income for long-haul drivers across Canada. For short-haul drivers, the Alberta income premium is even higher, with the average short-haul driver earning $53,431 annually, 8% higher when compared to $49,561 paid across the country. See Figure 19.

[10] Trucking HR Canada will be implementing Alberta-specific compensation surveys in 2024 and 2025 to try to provide more detailed information on compensation of drivers in the province.

FIGURE 19: AVERAGE ANNUAL INCOME FOR DRIVERS ALBERTA AND CANADA

Alberta   **Canada**

Long-haul
- Alberta: $67,372
- Canada: $66,276

Short-haul
- Alberta: $53,431
- Canada: $49,561

$0 $20,000 $40,000 $60,000 $80,000

Source: Trucking HR Canada, Employer survey, 2023

In 2022, almost half of employers offered compensation increases to long-haul drivers of more than 5%

In 2020, no employers offered long-haul drivers compensation increases of more than 5%, and 67% offered increases of less than 2%. On the other hand, in 2022, 47% of employers offered pay increases of over 5% and of these, 3% offered more than 10% higher compensation to their long-haul drivers. This is likely a response to the record high number of vacancies experienced, not only for transport truck drivers but across all occupations, both in Alberta and Canada. See Table 2.

TABLE 2:

YEAR-OVER-YEAR CHANGES IN LONG-HAUL DRIVERS' COMPENSATION (% OF RESPONDENTS), ALBERTA, 2020 – 2022

	NO CHANGE	INCREASED 0-2%	INCREASED 2-5%	INCREASED 5-10%	INCREASED > 10%	DO NOT KNOW
2020	28%	39%	25%	0%	0%	8%
2021	8%	22%	47%	17%	0%	6%
2022	3%	3%	42%	44%	3%	6%

A Look Forward: Labour Market Forecasts From 2024 to 2030

In 2023, Trucking HR Canada revised and updated our labour market forecasts to assess how labour shortages will evolve over time. This included developing projections of labour supply, labour demand, employment, unemployment, and vacancies until 2030. These forecasts were made for the whole trucking and logistics sector, as well as for 37 specific occupations, and for Canada and each province. Furthermore, Trucking HR Canada's LMI outlook tool allows us to examine the potential impact of implementing programs and developing tools intended to attract more workers to the sector and retain more of the existing workforce, particularly drivers.

Baseline scenario: labour demand forecast outstrips supply projections across the sector and within the truck driver occupation

The baseline or status quo scenario depicts the expected labour market outcomes if the sector's ability to attract workers and retain drivers does not improve. The demand for labour in Alberta's trucking and logistics industry is expected to grow between 2024 and 2030, with employment increasing by 8%, from an estimated 112,600 in 2024 to a projected 122,000 in 2030. With vacancies growing at an average rate of 1.3% per year, they are expected to reach 6,550 by 2030.

Labour supply — the sum of employed workers and active job seekers[11] — in Alberta's trucking and logistics sector is expected to grow from 119,224 in 2024 to just under 129,000 in 2030. This increased labour supply is largely due to the increase in employment, with unemployment increasing at just 0.6% per year. The net inflow[12] of workers to the sector is projected to be approximately 1,450 per year.

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[11] The number of active job seekers is measured by the number of unemployed workers. In Canada's Labour Force Survey, a person is counted as unemployed if they are available for and actively seeking work in the reference week of the survey.

[12] Inflow includes workers who enter the trucking and logistics labour force from all sources, including new entrants (school leavers and those entering trucking and logistics from other industries), immigrants, and non-permanent residents. Outflow accounts for those who leave the sector for jobs in other industries or to retire, as well as other attrition such as illness, death, dismissal, or those who drop out of the labour force altogether. Net inflow is the difference between inflows and outflows.

Although Alberta's total labour demand and supply in the trucking and logistics sector are each forecasted to grow at 1.1% annually, the gap between them will continue to grow. In the absence of programs to support employers to retain more drivers and attract new workers, the gap between demand and supply is expected to increase from 1,928 in 2024 to almost 2,300 in 2030. It should be noted that this number understates the true labour shortage within the sector, since it implies that all active job seekers are readily employed in vacant positions. See Figure 20.

FIGURE 20: FORECASTED LABOUR DEMAND, SUPPLY AND GAP, TRUCKING AND LOGISTICS SECTOR, ALBERTA 2024 – 2030, BASELINE
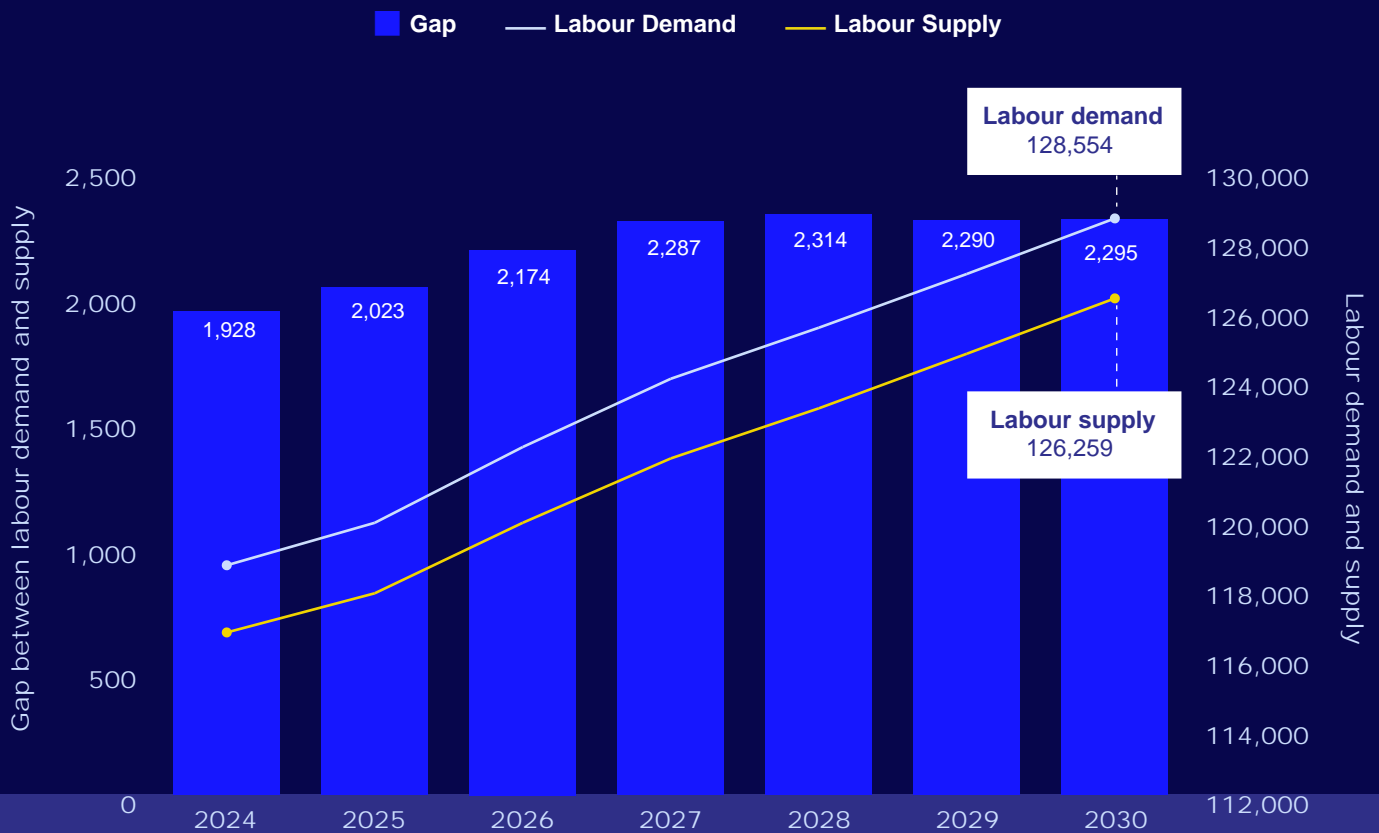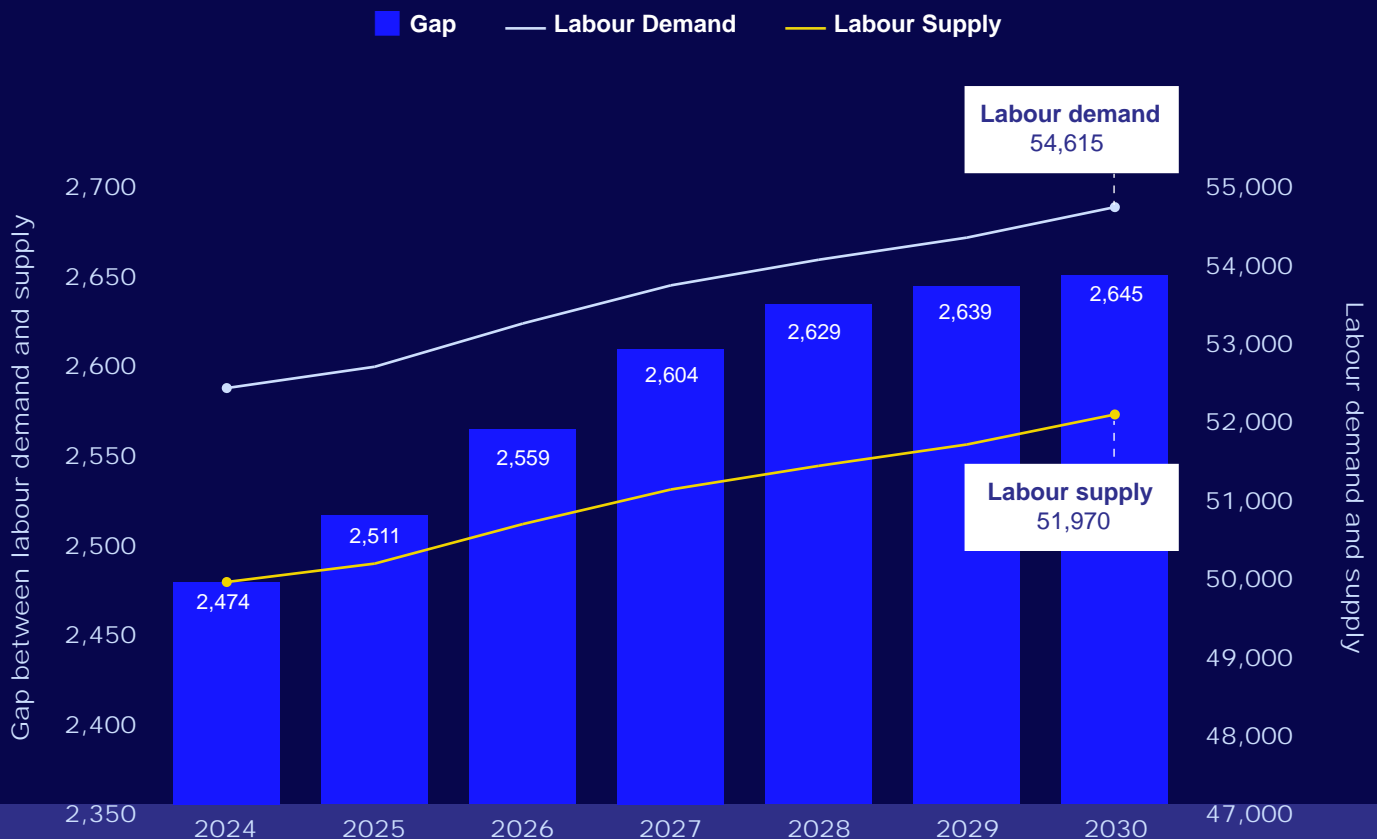

Source: Trucking HR Canada's Labour market outlook dashboard (adjusted), 2023

For the transport truck driver occupation, the baseline outlook is similar. The sector will employ an additional 2,120 drivers by 2030, an expansion of 4.4% from 2024. The number of vacant truck driver positions is expected to reach almost 4,450 in 2030. Unemployment among Alberta truck drivers is forecasted to stay relatively flat, increasing by just 0.1% per year to 2030. The net inflow of drivers is expected to be 360 per year.

As a result, the gap between the demand and supply of workers could rise by 7% between 2024 and 2030, meaning employers will need to recruit, train, and on-board at least 2,645 brand new drivers in 2030. See Figure 21.

Our baseline forecast shows that unless the sector's ability to recruit workers and retain drivers improves, the gap between demand and supply of workers will continue to grow. However, it also highlights that other occupations in the industry are coming under increasing pressure. While the annual growth rate of vacancies for transport truck drivers in Alberta is projected to increase by 0.6% per year from 2023 -2030, for non-driver occupations the number of vacancies is expected to grow by 2.7% per year.

FIGURE 21: FORECASTED LABOUR DEMAND, SUPPLY AND GAP, TRUCKING AND LOGISTICS SECTOR, ALBERTA 2024 – 2030, BASELINE

Legend: ■ Gap — Labour Demand — Labour Supply

Labour demand 54,615

Labour supply 51,970

Gap between labour demand and supply (left axis):
- 2024: 2,474
- 2025: 2,511
- 2026: 2,559
- 2027: 2,604
- 2028: 2,629
- 2029: 2,639
- 2030: 2,645

Source: Trucking HR Canada's Labour market outlook dashboard (adjusted), 2023

Taking action: changing the labour market outlook

Trucking HR Canada's labour market outlook model allows us to explore how different supply management programs could help ease the tightness in Alberta's trucking and logistics labour market. For example, if the sector was to implement initiatives that boosted the attraction of new workers by 15%, the net inflow of workers to the industry would be more than 1,640 per year from 2024-2030, up 13% from the baseline scenario.
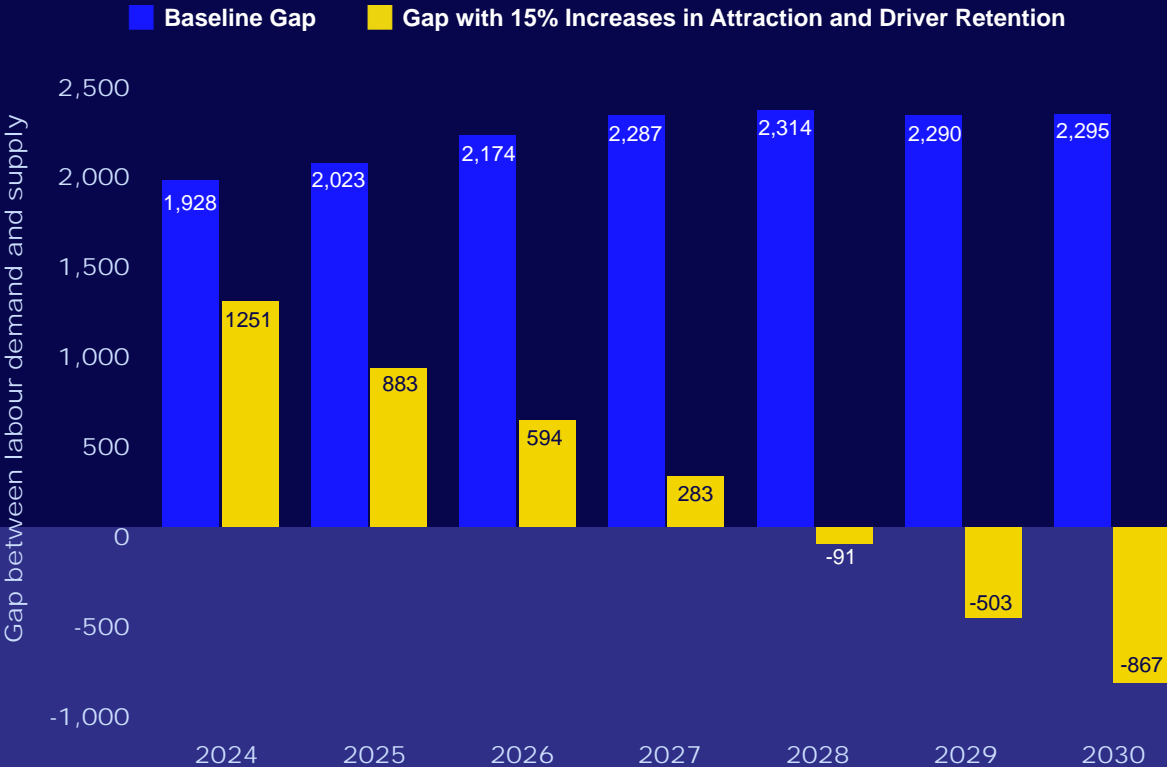
If, in addition, programming aimed at improving the retention of workers could reduce voluntary turnover among transport truck drivers by 15%, the net inflow of workers could reach almost 1,760 per year and the average number of vacancies per year would drop to 4,340

compared to 6,300 vacancies per year in the baseline forecast.

Implementing programs to increase retention of drivers and improve the ability of the sector to attract workers has the potential to narrow and even close the gap between labour supply and demand in Alberta's trucking and logistics industry. See Figure 22.

However, closing the gap between supply and demand will not eliminate the need to recruit, hire, and train new employees. Employers will still need to attract new workers and train them as the sector's workforce ages and workers for other employment.

FIGURE 22: REDUCTION IN LABOUR GAP WITH SUPPLY MANAGEMENT INTERVENTIONS, TRUCKING AND LOGISTICS SECTOR ALBERTA, 2024 – 2030

Legend: ■ Baseline Gap ■ Gap with 15% Increases in Attraction and Driver Retention

Year	Baseline Gap	Gap with 15% Increases in Attraction and Driver Retention
2024	1,928	1251
2025	2,023	883
2026	2,174	594
2027	2,287	283
2028	2,314	-91
2029	2,290	-503
2030	2,295	-867

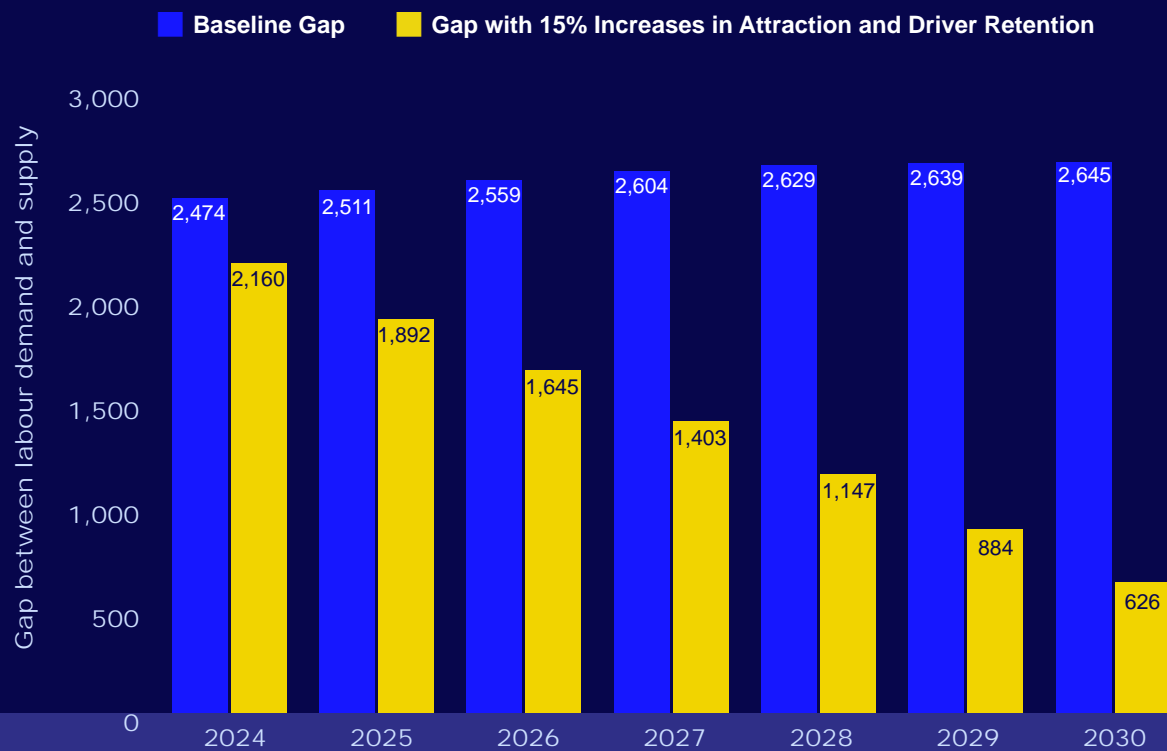Y-axis: Gap between labour demand and supply

Source: Trucking HR Canada's Labour market outlook dashboard (adjusted), 2023

Even in a scenario where driver retention is increased by 15% and attraction to the sector improves by 15%, the shortage of drivers persists. Aggressive programs to increase the sector's labour supply helps reduce the gap between demand and supply of drivers, but employers will still need to recruit, train, and on-board at least another 626 brand new drivers in 2030. See Figure 23.

FIGURE 23: REDUCTION IN LABOUR GAP WITH SUPPLY MANAGEMENT INTERVENTIONS, TRANSPORT TRUCK DRIVERS ALBERTA, 2024 – 2030

Baseline Gap   **Gap with 15% Increases in Attraction and Driver Retention**

Gap between labour demand and supply

Year	Baseline Gap	Gap with 15% Increases
2024	2,474	2,160
2025	2,511	1,892
2026	2,559	1,645
2027	2,604	1,403
2028	2,629	1,147
2029	2,639	884
2030	2,645	626

Source: Trucking HR Canada's Labour market outlook dashboard (adjusted), 2023

Conclusion: Final Thoughts

In the context of increasing input costs, elevated interest rates, the aging population, and a global freight recession, Alberta's trucking and logistics sector continues to struggle to find enough workers to fill their labour needs and meet demand for services. Despite evidence of a cooling labour market in 2023, our forecasting model anticipates that, without ongoing support to attract, recruit, and retain workers, Alberta's trucking and logistics labour shortage will persist.

Failing to address the underlying labour market and HR challenges in trucking and logistics could have serious consequences for the rest of Alberta's economy. Even if the sector successfully improves its supply of workers, the challenges around training and onboarding new employees remain significant.

In the coming years, Alberta's trucking and logistics sector will require continued resources and support to assist them in recruitment, retention, and training workers in both driving and non-driving occupations. Some programs and projects have shown promise in terms of supporting the industry to attract new workers to the industry. However, there is still a need to coordinate and standardize training required to on-board new employees and to develop a sufficient number of workers with the right skills and appropriate experience to keep Alberta's economy moving.

Looking for more LMI Resources?

Trucking HR Canada's labour market information is essential to ensuring the workforce is ready and able to keep Canada's goods on the move.

Trucking HR Canada has a wide variety of resources and tools available to support employers with recruitment, retention, and training of staff, as well as development and implementation of HR policies and procedures.

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