Bar2

Key Trends Shaping the UK Logistics Sector in 2025

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Introduction from Joss Lowery, Managing Director at Bar2

The UK logistics sector is the lifeblood of our economy and, like many sectors, is facing unprecedented change as it adapts to technological advancements, changing government and policy, and evolving consumer expectations and behaviours. Now more than ever, its success depends on collaboration across the supply chain. The need for innovation has never been greater; businesses must create plans to adapt to workforce shortages whilst complying with regulatory pressures such as IR35. Recruitment agencies must act as strategic partners, helping companies navigate these challenges while ensuring ethical and compliant employment practices.

Having served recruitment businesses for over 23 years, Bar2 has witnessed many watershed moments. Given the advancement in technology, challenging economic times, and shifting global politics, it now feels bigger than many that have preceded.

There are three areas in which businesses must excel to thrive in 2025:

1. Workforce Planning Strategies: Longer-term, strategic partnerships must be formed within the supply chain to support flexible working arrangements. Equally, forming strategic partnerships to help sculpt the workforce of tomorrow whilst also developing incentives that attract a diverse talent pool, particularly younger workers, will help set businesses up to thrive for years to come.

2. Embracing Technology: Modern technology has made automating repetitive tasks easier. Adopting automation initiatives and coupling it with the power of AI, can increase capacity and scalability whilst also reducing waste, and offsetting recent economic pressures and wage inflation.

3. Address Compliance Proactively: Navigate complex employment laws and tax regulations with transparency, ensuring fair treatment of workers and alignment with evolving legal frameworks and Equality, diversity and inclusion initiatives.

Innovation should not be limited to technology; it must extend to how we view employment relationships. Agencies need to redefine their value proposition and act as trusted partners to support workforce transformation, whether advocating for fair pay, advising on localised pay trends, or goal-oriented and sustainable employment advice that supports their customers' objectives.

Now more than ever, collaboration across the supply chain will be the key to overcoming challenges, meeting consumer demands, and building a sustainable future. The question is no longer whether to innovate but how quickly and effectively we can do so together.

Company headcount growth and redundancies

ONS data reveals that the **UK's logistics sector has seen a 5% annual increase in employment, driven by rising e-commerce and final-mile delivery demand.**[1]

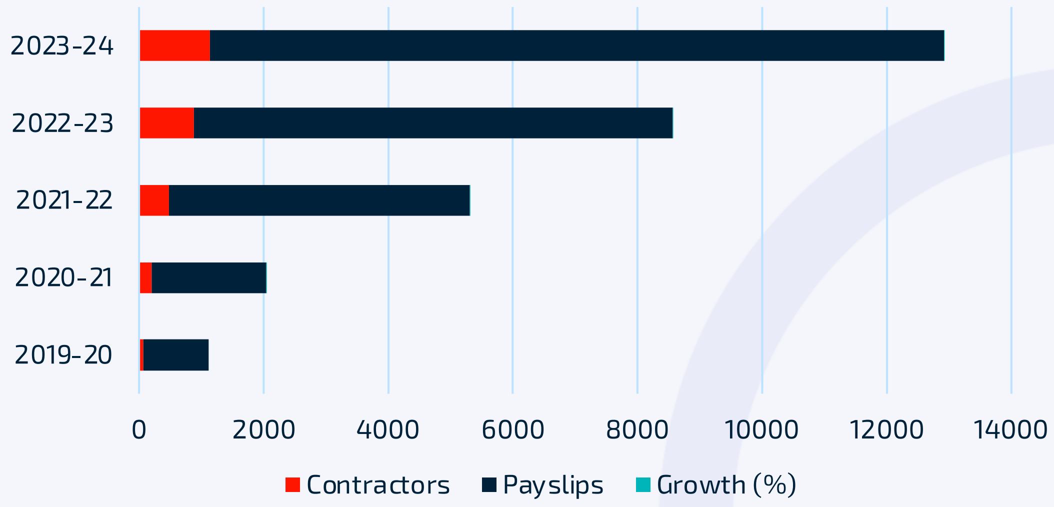
Why? The bottom line is consumer habits have changed due to the COVID-19 pandemic.

Between 2020-23, we witnessed a global shift in how people shop, spurred by government-imposed restrictions. With billions of people staying home and redundancies increasing to a record high of 14.2 per thousand employees,[2] consumer spending dropped by 22.2%.[3]

As a result, demand in traditional retail decreased while the need for last-mile delivery services surged. In the peak of the pandemic, total retail sale volume fell by 1.9%, the largest annual fall on record.[4] However parcel volumes surged, with the UK shipping 4.1 billion parcels in 2021, a trend that's expected to continue as online shopping grows.[5]

Last-mile delivery services, which focus on delivering goods directly to consumers' doorsteps, offer several advantages over traditional retail, including next-day delivery, convenient door-to-door service, and often better deals for consumers.

Bar2 UK logistics employment data



The rapid growth of e-commerce has significantly raised consumer expectations for speedy delivery, with many now anticipating same-day or next-day service. In the UK, internet sales grew from 19.2% of total retail sales in 2019 to 26.7% in 2023.[6] This shift has placed considerable pressure on the logistics sector to boost efficiency and shorten delivery times, especially during peak seasons such as Christmas.[7]

As the logistics sector grows, recruitment agencies may find themselves competing with industries like warehousing and transportation for a limited talent pool. To attract and retain workers, agencies may need to offer competitive wages or additional benefits to stand out from other recruiters.

In response to these changing demands, FTSE 100-listed companies such as Royal Mail and DHL have expanded their workforce, [8] to accommodate a surge in parcel deliveries. Additionally, the Royal Mail Group's share price has risen to £341 per share in 2024, up from £212, reflecting the growing demand. [9]

As online delivery services become a permanent fixture in consumers' shopping habits, **traditional retail redundancies have risen, peaking at 15% this year.** [10]

This presents an opportunity for recruiters, as many workers within these roles find themselves unemployed and seeking temporary logistics roles. While this expands the talent pool, it intensifies competition among job seekers, making it challenging for recruitment agencies to identify and secure highly qualified candidates. Recruitment agencies therefore need to implement efficient screening processes to pinpoint the best talent.

Additionally, workers transitioning from low-paid or less stable retail jobs are likely to seek positions that offer greater benefits. This places pressure on agencies to collaborate with logistics companies that roles meet these growing demands.

Over the last two years, several FTSE 100/250 have made redundancies as part of restructuring efforts in response to economic uncertainty, technological shifts and changing consumer behaviour. [11] For example, M&S have announced 7,000 job cuts in a bid to shift towards more digital-focused operations and cut back on costs. [12]

High vacancy rates

The UK logistics sector has experienced a consistently high vacancy rate, driven by rising demand and an ever-growing need to fill driving roles. Contributing factors to the shortage:

Brexit

The UK's departure from the EU reduced the availability of workers. Many EU nationals who had previously filled a significant portion of driving roles faced new immigration barriers, prompting many to leave the UK. Furthermore, the weakened Pound, driven by Brexit, made countries like Germany more attractive to workers due to favourable exchange rates.

Ageing Population

The growing number of drivers retiring each year, coupled with a lack of younger drivers entering the industry, is further exacerbating the driver shortage. According to the Road Haulage Association 2019 report, the average age of a road haulage driver is 55, with only 1% of heavy goods vehicle (HGV) drivers under the age of 25. [13]

COVID-19

The COVID-19 pandemic paused driver training and testing, causing a licensing backlog.

In 2021/22, HGV test reforms aimed to boost examiner productivity, free up tests, add resources to the testing process and reduce the cost of obtaining a licence. These include:

- Allowing drivers to take a test in an articulated lorry or lorry and trailer combination or a bus/coach and trailer, without having passed a test in a rigid lorry or bus/coach
- Offloading manoeuvres to third-party assessors

While these changes addressed driver shortages, concerns remain about training quality and safety standards. [14]

Competitive salaries

Rising competitive salaries are deterring drivers from entering the sector. In London, an Aldi Store Assistant salary ranges from £13.65-£13.95 per hour, with nights and bank holidays paid at premium rate. [15] In comparison, the UK average HGV driver salary is £28,277 per year or £14.50 per hour, with entry-level positions starting at £24,432 per year [16]

With comparable wages, perks like safer conditions, consistent hours and a social environment, it's understandable why many may prefer this role over becoming an HGV driver.

High vacancy rates

Impacts of the shortage

Wage Inflation

Wage inflation has become a notable trend, with companies increasing salaries to attract and retain skilled workers in a competitive market.

This is driven by the basic principles of supply and demand: when there's a low supply of workers and high demand for their skills, companies are forced to offer higher pay. As a result, this imbalance contributes to wage inflation, as businesses compete to secure the limited talent available.

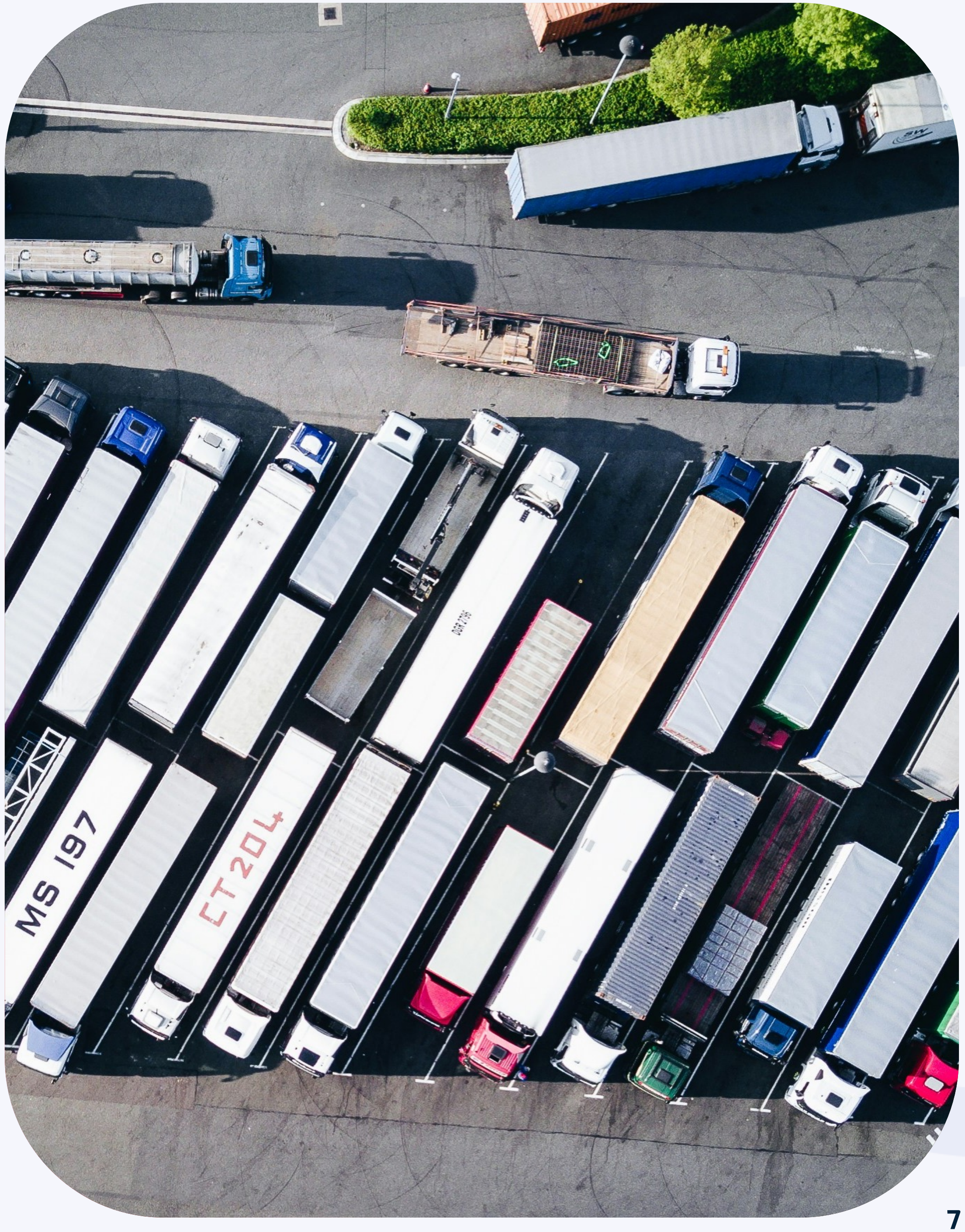
The UK faces a driver shortage of 50,000, according to the Road Haulage Association.[17] HGV driver numbers dropped from 304,000 in 2019/20 to 275,000 in March 2021.[18]

Average employee tenure

Next, the duration of employment in these roles has shortened, as companies frequently "poach" talent from competitors to fill vacancies. This increases competition, prompting employers to offer better benefits and career progression opportunities. Agencies face higher demand to source and retain skilled talent, while managing high turnover and the need to promote attractive roles.

Ad hoc employment solutions

Finally, the sector is increasingly employing temporary workers to fill roles and manage the surge in last-mile deliveries. This drives greater dependence on agencies to meet these demands.



Economic and market conditions, regulatory pressures and compliance

The UK logistics sector is seeing rising costs driven by inflation.

Fuel prices have risen on average by 8 pence since the beginning of 2024 [19]

This can be attributed to several factors:

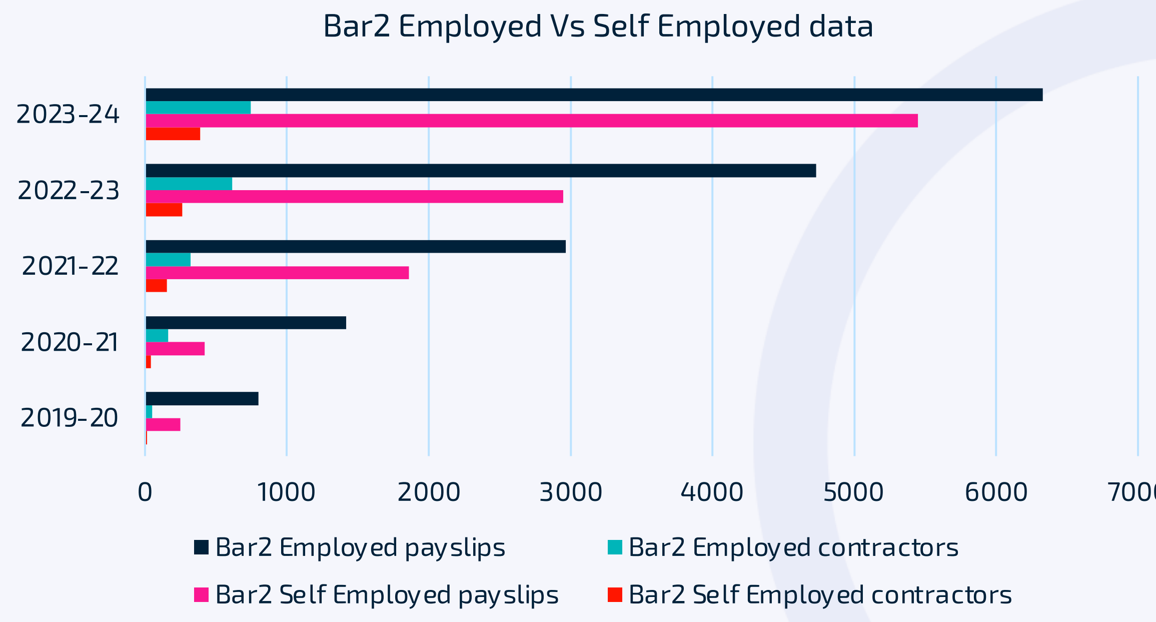
- **Inflationary pressures** – Rising raw material costs and labour expenses have driven up fuel prices.
- **Ukraine war** –The Ukraine war has spiked fuel prices by disrupting Russian oil exports, tightening global supply and increasing competition for alternatives. Supply chain disruptions have also risen transport costs.
- **Stricter environmental regulations** - Worldwide, stricter environmental regulations is causing the cost of producing and selling fossil fuels to increase, having an impact on the price at the pump.
- **Currency fluctuations** – Since oil is priced in US dollars on global markets, and the value of the British Pound has dropped, it's more expensive for the UK to import oil, leading to increased fuel prices. [20]

Impacts

Increased operational costs - As fuel prices rise, so do business overheads, leading to reduced profit margins and budgetary pressures for businesses.

Focus on retention strategies – Agencies face pressure to source drivers as companies offer higher wages and benefits to attract and retain talent.

Driver turnover - Driver morale may drop if they cover fuel costs, leading to higher turnover and increased pressure on recruiters to fill roles quickly.



Net zero

The UK government aims to reduce carbon emissions and achieve net zero by 2050. [21]

In August 2023, 32 London Boroughs became low-emission zones, [22] and the Euro 6 standard enforcement pushed companies to invest in cleaner, efficient vehicles like electric and hybrid trucks to meet compliance requirements. For example, DPD UK has opened all-electric last-mile delivery depots and deployed a fleet of electric vehicles to reduce emissions. [23]

Impacts

- **Green technology driver experience** - Agencies may need to source drivers skilled in operating electric or hybrid vehicles due to rising demand.
- **Increased operational costs** – Green vehicle investment raises logistics costs, prompting companies to hire skilled workers for greater efficiency and sustainability. Agencies may need to adjust strategies to source these workers.

Disrupted supply chains

Haulage companies have had to dedicate further resources to manage compliance.

The requirement to comply with updated regulations has impacted delivery schedules as border delays and additional checks become more apparent. These delays have disrupted supply chains, delivery times, customer satisfaction and overall efficiency.

Brexit

Post-Brexit changes in custom procedures and border controls have added cost and compliance challenges for supply chains. Since the UK is no longer a part of the EU, goods traded between the two face heavier custom declarations, checks and other tariffs.

Impacts

- Increase in operational costs – from stricter documentation, longer border processing and fines for non-compliance. [24] This may cause businesses to delay hiring decisions, impacting agency revenue.

According to the Environmental Systems Research Institute (ESRI), the volume of products traded between the EU and the UK has decreased by one-fifth as a result of Brexit, [25] while Four Kites analysis shows that 38% of road cargo crossing the Schengen border (encompassing the majority of EU countries) experienced delays. [26]

Bar2 Data - Wage Inflation

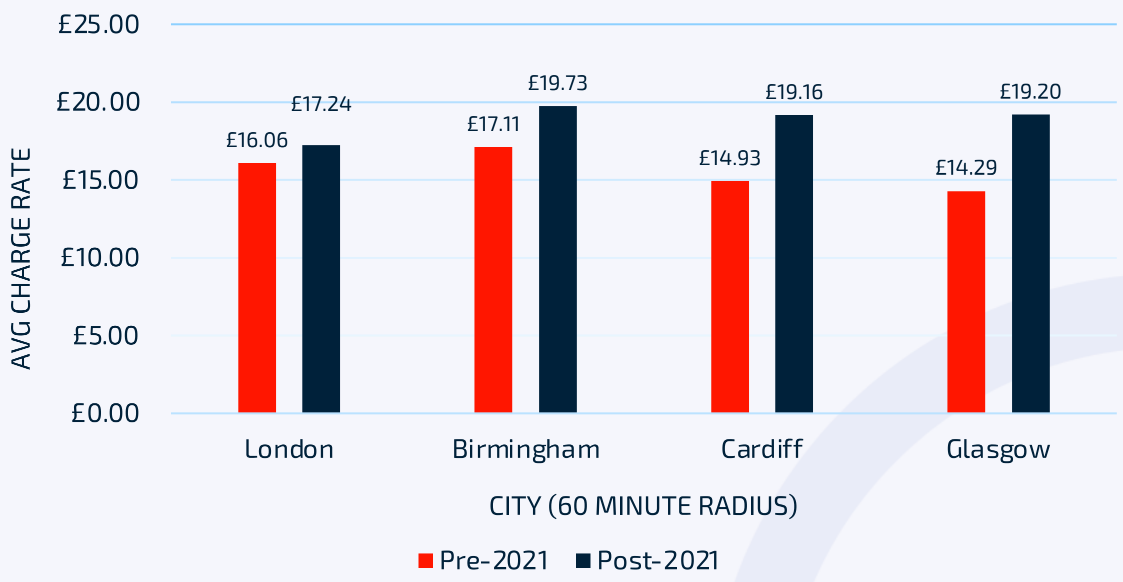
Annual wage growth
Our data displays a £3.43 increase in the average contractor wage from pre-2021 to post-2021, confirming the impact of the driver shortage and increased competition for talent in the market.

Pre-2021
18 clients
81 workers
1,624 payslips

£17.41
Average rate

Post-2021
33 clients
1,654 workers
22,754 payslips

£20.84
Average rate



Geographical wage comparison
Examining regional wage trends, Glasgow and Cardiff are experiencing the most significant inflationary pressures, with average rate increases of £4.91 (Glasgow) and £4.23 (Cardiff), respectively, from pre-2021 to post-2021.

These cities are clearly facing the most pronounced talent shortages, pushing companies to raise their offers to attract and retain workers.

LDN
+£1.18

BHM
+£2.62

CWL
+£4.23

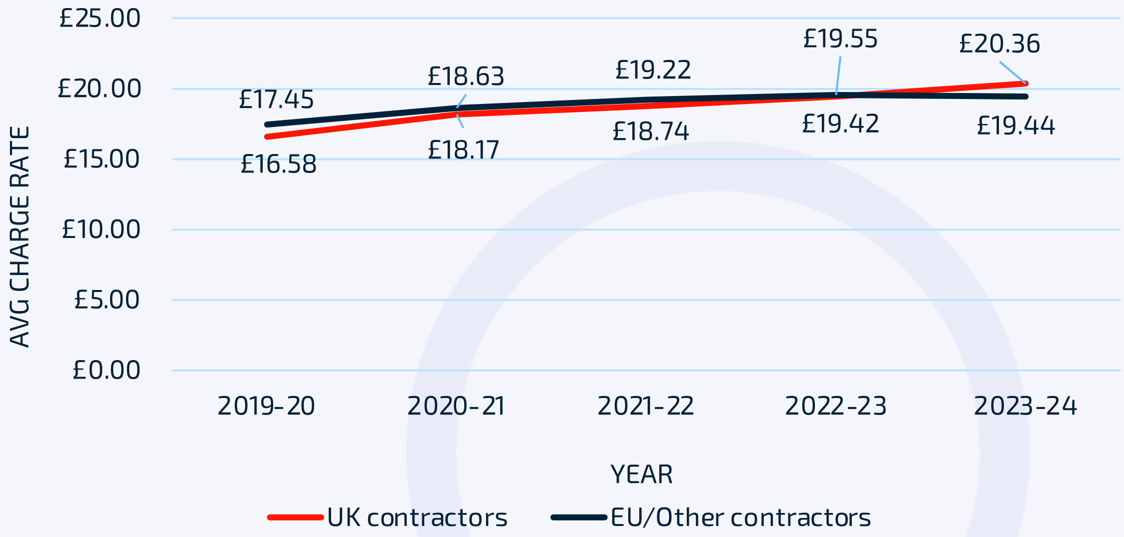
GLA
+£4.91

Bar2 Data - Post-Brexit shifts in Employment

Annual wage growth – pay trends for EU vs UK contractors
Our findings reveal a notable rise in UK contractor wage growth since Brexit in January 2020.

The departure of EU workers due to Brexit is reflected in the increase in wages from £16.58 to £18.17 between 2019/20 and 2020/21, a jump significantly larger than the average increase of £0.73 seen in subsequent years (2021/22 to 2023/24). In contrast, the earlier increase averaged £1.59.

This trend suggests that the post-Brexit reduction in EU workers may have driven up wages for UK-based contractors between 2020 and 2021 as businesses seek to fill workforce gaps.



Bar2 Data - Contractor Turnover Rates and Retention

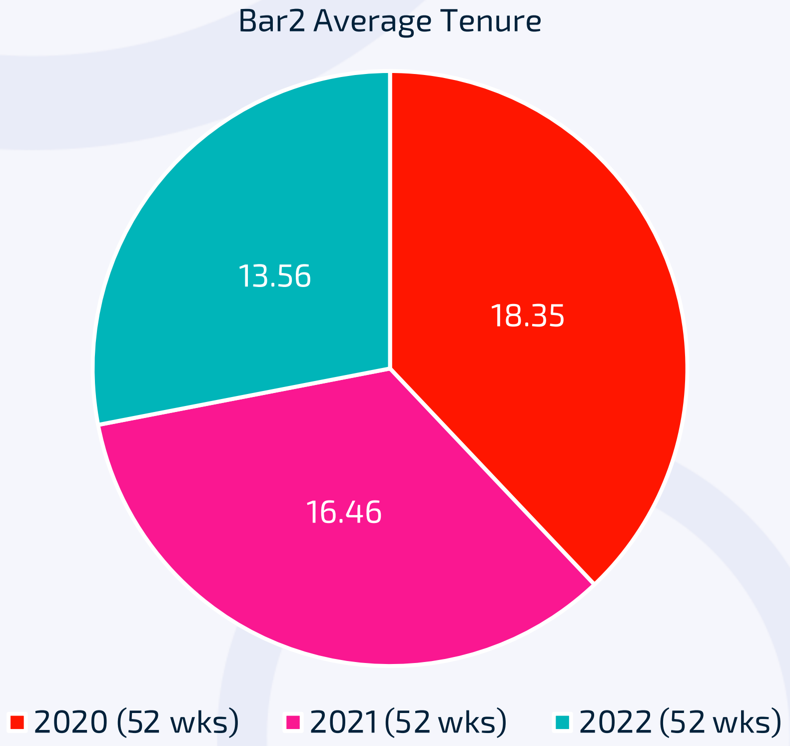
Contractor retention
Our data analysis on contractor turnover from 2020-22 displays trends shaped by rising inflationary pressures and wages.

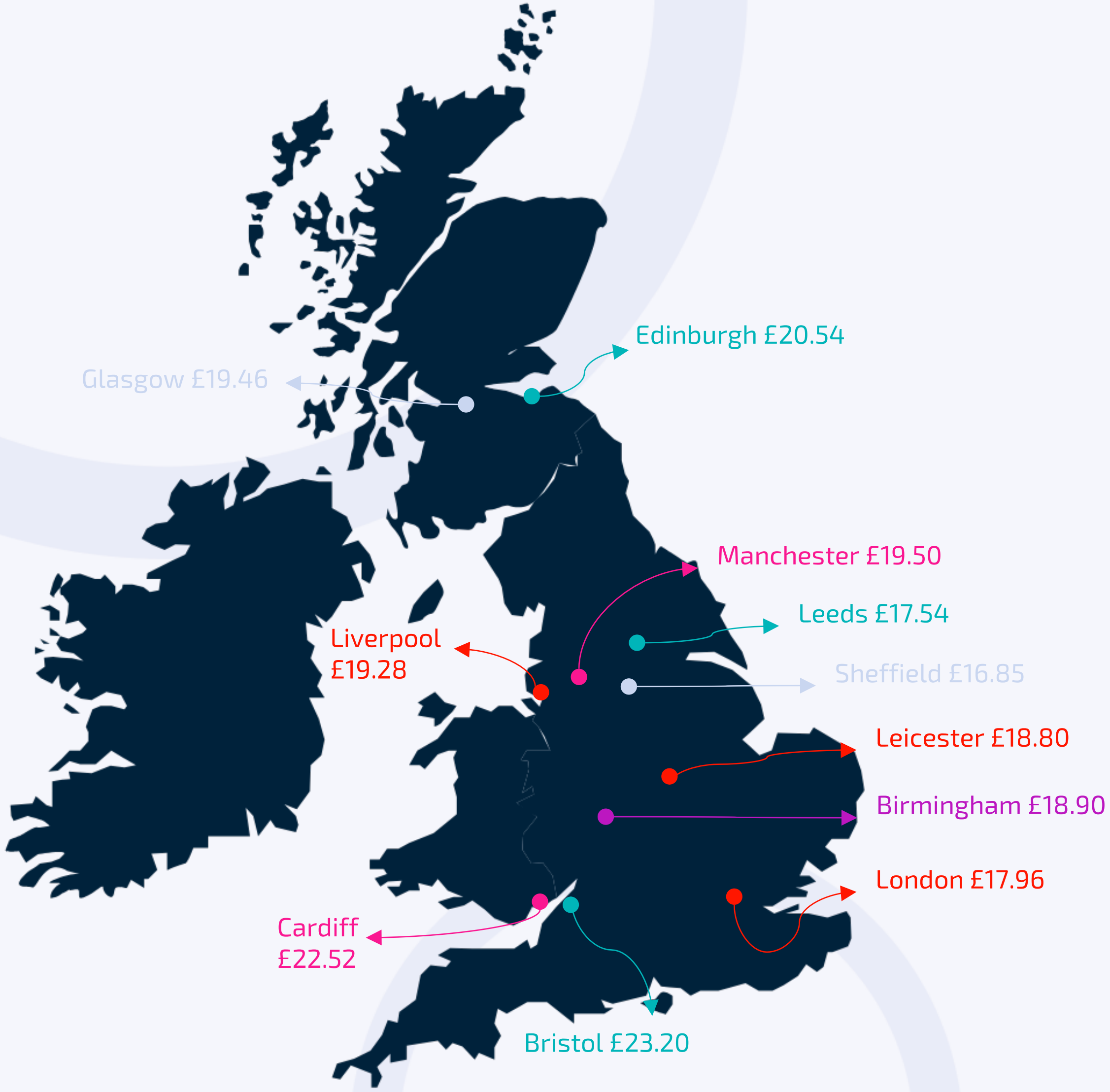
Overall, the data displays a steady increase in contractor turnover, with a particular rise from late 2021 into 2022. This increase corresponds with the sharp rise in fuel and living costs experienced in 2021, driven by the widespread disruptions caused by the COVID-19 pandemic.

These trends place emphasis on the growing difficulties the transport sector is facing when it comes to retaining workers within the continued economic challenges. While wage increases have been enforced to support and retain workers, it's evident that they have not been sufficient enough to combat the impact of rising inflation.

Now more than ever, there is an urgent need for the logistics and transport industry to reassess its strategies, and offer:

- **Flexible work arrangements** – for example, flexible hours
- **Incentives** – implement bonus or rewards programs tied to performance to motivate and retain workers
- **Encourage feedback and engagement** – to address concerns and involve contractors in decision-making processes
- **Additional benefits** – such as health insurance, transport allowances, and financial planning assistance





Bar2 Data - Regional differences in labour costs

Is inflation driving up labour costs unevenly across the UK?

Our data reveals notable regional differences in labour costs across the UK. In areas such as Cardiff and Bristol in the Southwest, and Liverpool, Glasgow, Edinburgh, and Manchester in the North, average charge rates tend to be higher in comparison to the Southeast where charge rates are noticeably lower. In the Southeast, Sheffield, London, Leicester, Birmingham and Leeds fall into this bracket.

In the North and Southwest, rising living and fuel costs have pushed companies to offer higher wages to attract and keep skilled workers, creating more competition for talent. Meanwhile, areas like the Southeast, where wages haven't risen as sharply, face less immediate pressure but may struggle to retain workers in the long run due to factors such as rising cost of living, increased competition from other regions and worker dissatisfaction. If the cost of living continues to climb, workers may seek opportunities in areas offering better pay, and if wages fail to increase in line with inflation in these areas, employees may become dissatisfied and more likely to look elsewhere for high-paid opportunities.

A Technology Future

Telematics and fleet management
98% of global fleets are utilising telematics to optimise their operations, a trend that's expected to grow in 2025. [27]

What are telematics and fleet management systems?

- **GPS Tracking:** Real-time vehicle location data for better route planning and delivery tracking.
- **Vehicle Diagnostics:** Monitors vehicle fuel levels, engine health, and maintenance needs to prevent costly breakdowns.
- **Driver Behavior:** Tracks speed, braking, and acceleration to encourage safer driving.
- **Route Information:** Analyses traffic to suggest efficient routes, reducing delays and fuel consumption. [28]

Telematics combines telecommunications and informatics to deliver real-time data on vehicles and driver performance, using GPS, sensors, and wireless networks to enhance efficiency, reduce costs, and improve worker safety.

As logistics companies integrate these systems, demand for skilled workers—especially in temporary roles to support system implementation and upgrades—will surge.

Recruitment agencies will need to focus on sourcing talent with expertise and skills in telematics and fleet management software.

Automation and AI
The UK logistics automation market is predicted to reach USD 5,667.2 Million by 2033, growing at a compound annual growth rate of 15.81% from 2023 to 2033. [29] This rise in automation is driven by the need for greater efficiency, cost reduction, and growing consumer demand for faster, reliable services.

Looking ahead 10 years
Outdoor Autonomous Vehicles
Within the next 6-7 years, UK highways are expected to allow fully autonomous trucking, with companies like Tesla setting the standard. However, challenges such as regulatory approval, public trust, cost, and safety must first be overcome.[30]

The potential impacts include:

- Reduced reliance on human drivers. Agencies may be required to recruit workers with technical skills to support autonomous systems.
- Reduced accidents and carbon emissions
- Increased efficiency and more accurate estimated time of arrivals
- Improved driver work-life balance – fewer or no long-haul trips and more focus on operating within their local area
- Addressing labour shortages and rising costs
- Lower costs and better adaptation to changing consumer demands (e.g. Last-Mile deliveries)

JD Logistics demonstrates the scalability of last-mile autonomous delivery with a fleet of 600 vehicles across 30 cities in China. These vehicles can carry up to 200 kg, travel 100 km per charge, and feature advanced temperature-controlled storage for food deliveries. [31]

Social initiatives

Growth in Last-Mile Delivery
To manage the growth of last-mile delivery services, courier companies are investing in automated sorting, advanced tracking and route optimisation to improve efficiency and better serve customers. Many are also expanding their delivery fleets and workforce, with van usage for deliveries up 8% annually. Industry leaders such as Evri are recruiting 9,000 additional workers, including 8,000 couriers and 1,000 warehouse staff to handle the surge in e-commerce-driven deliveries. [32]

What will companies do to make the transport sector attractive for young people?

According to the Road Haulage Association 2019 report, the average age of a road haulage driver is 55, with only 1% of HGV drivers under the age of 25. [13]

To attract younger workers to the transport sector in 2025, companies are focusing on:

- **Career Growth:** Offering clear progression and continuous learning through upskilling programs.
- **Training:** Providing placements, internships, and apprenticeships for hands-on experience.
- **Technology:** Giving opportunities to work with AI and automation, appealing to tech-savvy generations. [33]

Bar2 Data

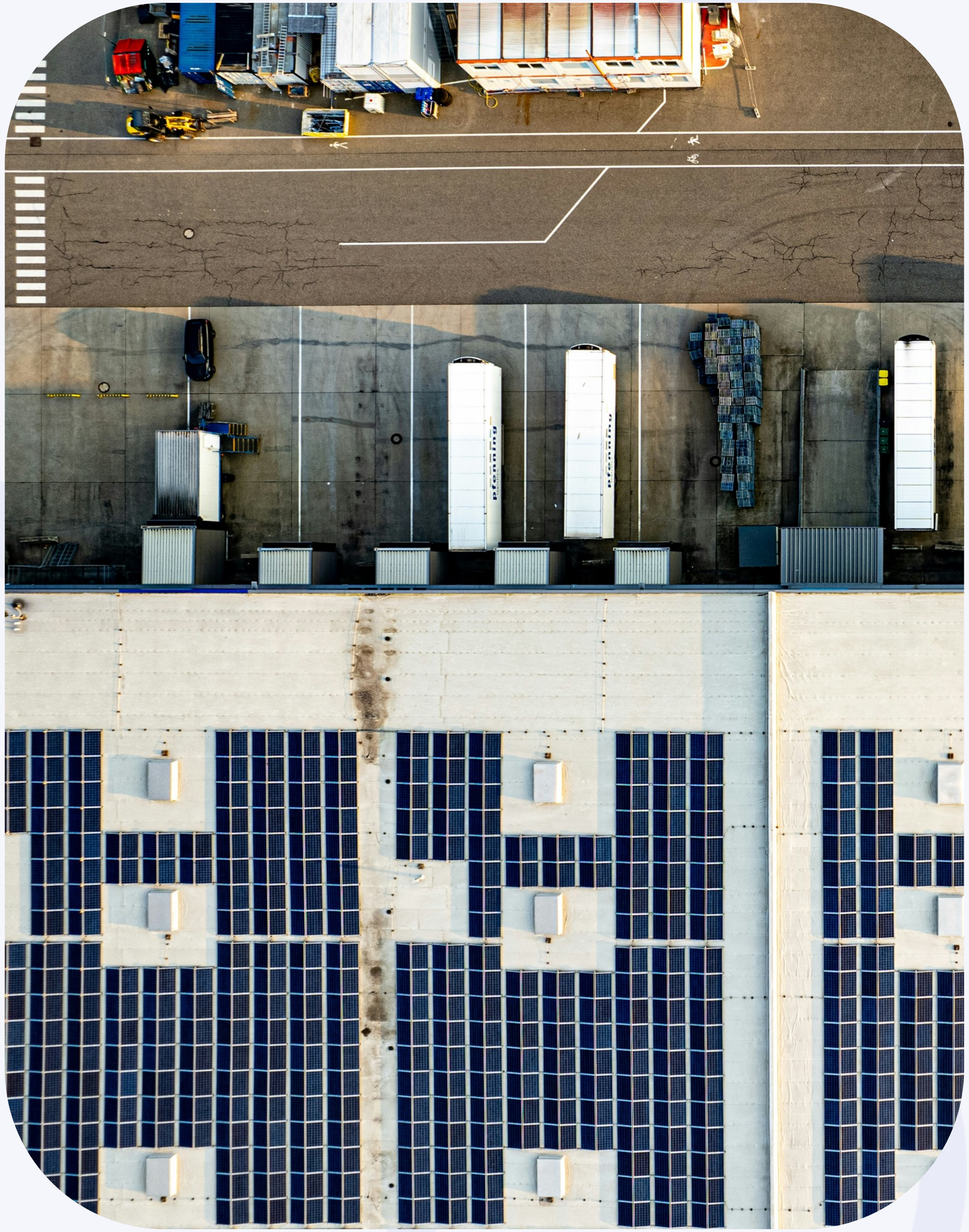
Bar2 data reveals that the average age of a large goods vehicle driver in the logistics industry is 42. Furthermore, our findings confirm that only 1% of HGV drivers in the UK are under the age of 25.

Bar2 average ages

- 7.5 Tonne Driver average age = 53
- HGV Class 1 Driver average age = 43
- HGV Class 2 Driver average age = 41
- Lorry Driver average age = 46

Bar2 large goods vehicle drivers aged 25 or under

- 18 Drivers
- 7 HGV Class 1 Drivers
- 8 HGV Class 2 drivers
- 1 van driver



Conclusion

The UK's logistics sector is undergoing a period of transformation, driven by evolving consumer habits, technological innovation, and economic challenges. The rapid growth in e-commerce, accelerated by the COVID-19 pandemic, has reshaped the landscape of retail and logistics, placing pressure on last-mile delivery services to meet rising consumer expectations for speed and convenience.

While this shift has created significant opportunities, it has also exposed critical challenges, such as talent shortages, wage inflation, and the need for industry adaptation to technological advancements and environmental regulations.

As the sector continues to integrate innovative solutions like telematics, automation, and green technologies, it must also address long-standing issues such as workforce shortages worsened by Brexit, an ageing driver population, and rising operational costs. Collaborative efforts between logistics companies, recruitment agencies, and policymakers will be essential to overcoming these barriers.

Looking ahead, the integration of advanced technologies, investment in workforce development, and a focus on sustainability will be key to securing the future of the logistics sector. By fostering innovation and adapting to changing market dynamics, the industry is well-positioned to continue its growth and meet the evolving needs of both businesses and consumers across the UK.

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