



The Association
of European
Vehicle Logistics



2010/2011

SURVEY OF VEHICLE LOGISTICS IN EUROPE

The association of European Vehicle Logistics has been the voice of the Finished Vehicle Logistics industry in Europe since 1997.

ECG represents the interests of 90 member companies, from family owned SMEs to multi-nationals, and is the major champion of the European vehicle logistics sector. We represent all transport modes at EU level. ECG Members provide transport, distribution, storage, preparation and post-production services to manufacturers, importers, car rental companies and vehicle leasing operators in 24 Member States, Turkey and Russia. They own or operate more than 360 car-carrying ships, 22 000 purpose-built railway wagons, 46 river barges and 20 000 road transporters.

As a major employer, the industry plays an important role in contributing to the economic success of the European Union. Today, ECG members have an aggregate turnover of €15 billion and their economic impact on companies associated with the sector is estimated at €34 billion. More than 60 000 Europeans are employed directly by the vehicle logistics industry and an additional 160 000 are indirectly employed in this sector.

ECG mission is to help maintain, promote and develop a sustainable, competitive and respected vehicle logistics industry in Europe and to promote its importance to the economy: by demonstrating the inherent value of our industry; by acting as information network and as the main negotiation platform between members and institutions; by striving to create the most favourable economic and regulatory environment in which to operate.

ECG works through a permanent secretariat in Brussels, a Board of Directors, as well as a number of specialised working groups.





The Association
of European
Vehicle Logistics



2010/2011

**SURVEY OF VEHICLE LOGISTICS
IN EUROPE**



The Association
of European
Vehicle Logistics

2010/2011

SURVEY OF VEHICLE LOGISTICS IN EUROPE

- Survey Delegate Board Member:** Jean-Michel Floret, Board Member
International Operations Director, STVA
- Project Management:** Marta Mottini, *ECG Research and Project Manager*
Mike Sturgeon, *ECG Executive Director*
- ECG Task Force:** Lola Uña Cárdenas
Gianmaria Sisti
John McLaughlin
Tatiana Wilfart
- Working Group:** Alessandro De Rosis, Grimaldi
Jan Fink, Litra
François Fleury, TEA
Valerie Giboureau, CAT Group
Sonia Llombart, Sintax Logistica
Stefan Promper, Hödlmayr
Mihai Sacui, Gefco Romania
Iwona Siejewicz, Adampol
Tobias Spannauer, Mosolf
Tiziana Spanó, i-Fast
Krzysztof Szeligowski, Adampol
Jurate Terebiene, Auto 1 Logistics
Jeroen Verkerk, Broekman Automotive
Alfred Walde, Helf
- Designed by:** Mazy Graphic Design,
Brussels, Belgium
- Printed by:** Orthdruk sp. Z o.o.
Bialystok, Poland
- Published by:** ECG
The Association of European Vehicle Logistics
Diamant Building
80, Bd Auguste Reyers
B-1030 Brussels
Belgium
Telephone: +32 2 706 82 80
Fax: +32 2 706 82 81
Internet: <http://www.eurocartrans.org>
Email: info@eurocartrans.org

No part of this publication can be reproduced, photocopied, scanned, digitalised or electronically stored without the express written permission of ECG

© 2010, ECG – The Association of European Vehicle Logistics

Printed in Poland in September 2010

TABLE OF CONTENTS

President's foreword	9		
Chapter 1 The automotive industry	15	Chapter 4 ECG and its activities	233
1.1 Introduction	17	4.1 ECG - The organisation	235
1.2 Global market	20	4.2 The secretariat	237
1.2.1 Automotive groups ranking 2009	20	4.3 Events	239
1.2.2 New vehicle registration	21	Highlights 2009-10	239
1.2.3 Vehicle in use	23	Forthcoming events	241
1.2.4 Production	24	4.4 Commissions, regional meetings and working groups	243
1.3 European market	26	4.5 Eu affairs	247
1.3.1 Automotive groups ranking 2009	26	4.6 Academy	265
1.3.2 Overview of the top groups in europe	27		
1.3.3 New vehicle registrations by brand	38	Chapter 5 ECG members data	271
1.3.4 New vehicle registrations by country	41	Appendix A Maximum dimensions	
1.3.5 Consumer demand 2009	44	Appendix B Strategic links	
Market share by country	44	Acknowledgements	
Sales by segment	44		
1.3.6 Trends in Co ₂ emissions	45	Advertisements	
1.3.7 Vehicles in use	46	AFG	16
Parc by country	46	Bergé Automotive Logistics	37
Car density	46	CargoTel	269
1.3.8 Production plants	47	Grimaldi Compagnia di Navigazione SpA	79
1.3.9 Trade	58	Groupe CAT	71
EU imports	59	ECG Academy	211
EU exports	61	IHS Automotive	72
		Hödlmayr International AG	80
		Horst Mosolf GmbH & Co KG	109
		i-FAST Automotive Logistics S.r.l.	63
		Inform	246
		Kässbohrer Transport Technik GmbH	87
		Koopman Logistics Group B.V.	90
		Lorh Automotive	66
		Manvesta	96
		MVT Ltd	187
		Pound Gates	207
		Rolfo S.p.a.	264
		RTL (Russian Transport Lines)	242
		STVA	234
		UECC	236
		Walon France	238
Chapter 2 Industry outlook	65		
2.1 Economic forecast	67		
2.2 New oems	73		
2.3 Looking ahead to an electric car future	81		
Chapter 3 The vehicle logistics sector	89		
3.1 How the sector works	91		
3.2 Country by country analysis	97		
Austria	98	Lithuania	162
Belgium	103	Norway	165
Bosnia-Herzegovina	108	Poland	168
Bulgaria	110	Portugal	172
Croatia	113	Romania	176
Czech Republic	114	Russia	180
Denmark	118	Serbia	186
Estonia	121	Slovakia	188
Finland	124	Slovenia	192
France	129	Spain	196
Germany	136	Sweden	202
Greece	143	Switzerland	208
Hungary	146	The Netherlands	212
Ireland	150	Turkey	216
Italy	153	Ukraine	221
Latvia	159	United Kingdom	225