

# General Assembly & Spring Congress

11-12 May  
Thessaloniki, Greece

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 **INFORM**

 **PROACT**  
GLOBAL SOLUTIONS

  
**Transporting Wheels**  
Your shipment, our commitment

# President's report

Wolfgang Göbel

# A challenging year for ECG

## ECG develops FVL Cost Index with PwC

### Digital clouds on the horizon for finished vehicle logistics

By Marcus Williams | 28 March 2023

Speakers from Volvo Cars, Inform and ECG debated the lack of transport capacity on road, rail and ocean at this year's ALSC Europe conference and talked about how digital tools could make the most efficient use of existing equipment



**MIKE STURGEON** ■ Director ejecutivo de la Asociación Europea de Logística de Vehículos (ECG)

**“Tenemos al menos 2 años más de lucha con una capacidad logística insuficiente”**

**“El gran problema es la escasez de camioneros; francamente, nadie tiene una solución”**

ECG publishes new version of its Capacity Crisis Briefing paper including March 2023 update



21.03.2023



### A cross-industry project to measure emissions

The Association of European Vehicle Logistics (ECG), the German Association of the Automotive Industry (VDA) and original equipment manufacturers will be working together in a cross-industry project to create a standard methodology for calculating and reporting on automotive supply chain emissions.

≡ MENU

**ShipMag.**  
Supply Chain Intelligence

LOGISTICA

**Ecg, nasce la prima metodologia standard per il calcolo e la rendicontazione delle emissioni per la supply chain automobilistica**

21 marzo 2023 - Tommy Periglioso

**Automotive LOGISTICS GLOBAL SHANGHAI**

**Volvo first to adopt VIN guidance from ECG and Odette**

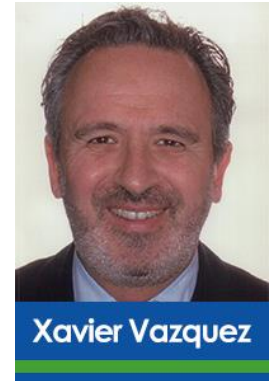
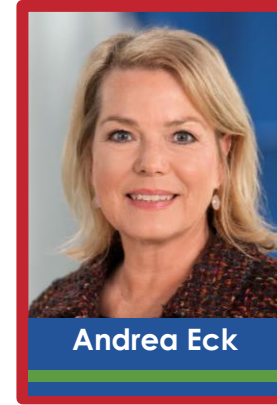
### Better pay and conditions will help solve the capacity crisis

By Marcus Williams | 18 October 2022

There is currently a capacity crisis in European finished vehicle deliveries and the situation is going to get worse before it gets better, according to the board of the Association of European Vehicle Logistics (ECG), which held its annual conference in the Austrian capital Vienna last week.

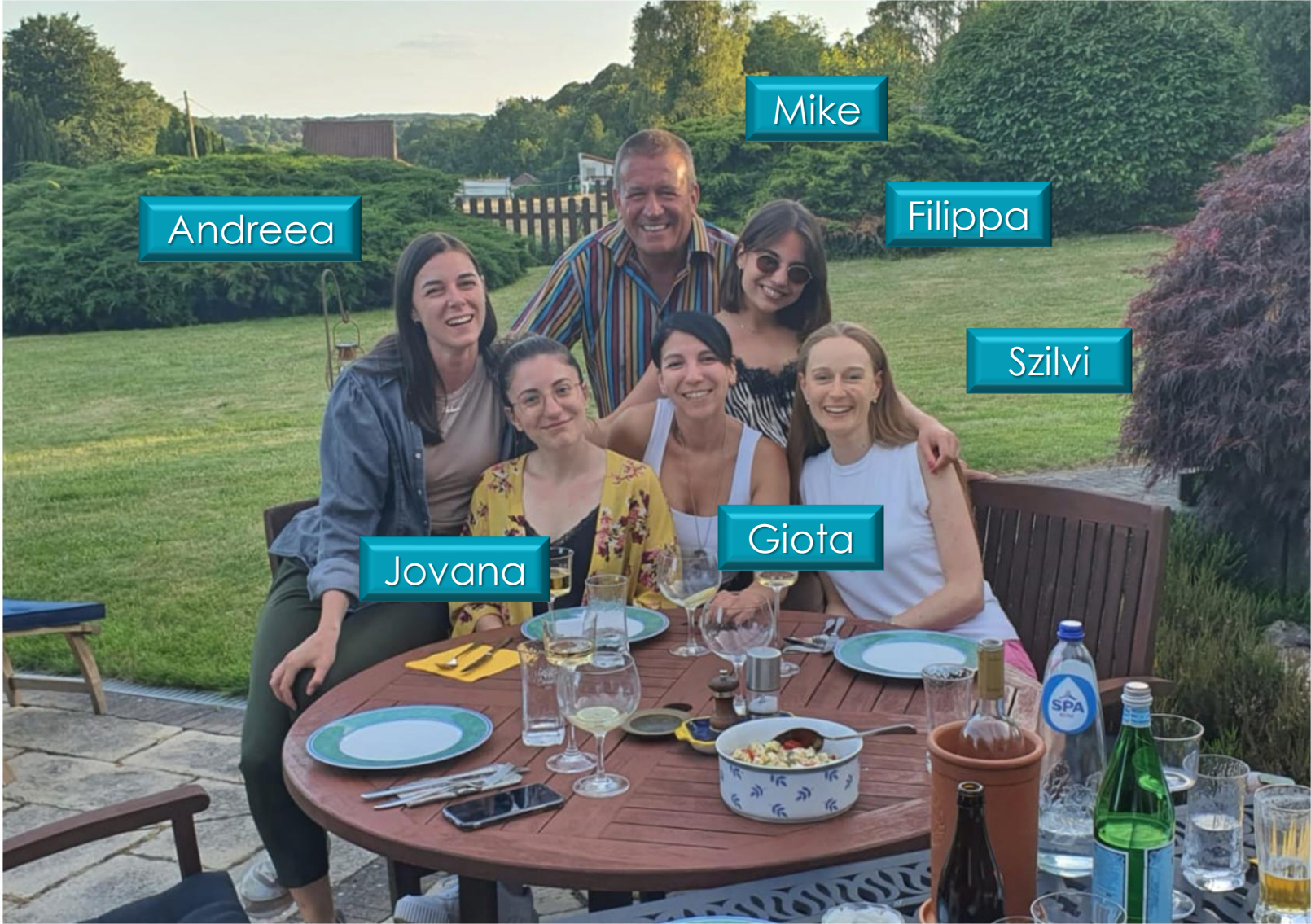


# ECG Board members 2022-23





# ECG Secretariat



Andreea

Mike

Filippa

Szilvi

Jovana

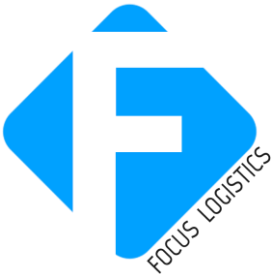
Giota

# ...joined during the year



# Growing membership

## New members since last GA



Handels- und  
Speditionsgesellschaft mbH



Thanks to our event partners



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**ECG**  
Business Intelligence

# HORIZON EUROPE

Finding Relevant Calls 2023-2024



**ECG**  
Business Intelligence

## Capacity Crunch: EU Mobility Package, Compounded Driver Shortages & Wage Hikes

Finished vehicle logistics players are hit by new laws while labour shortage continues compounded by Covid & War, despite rising wages

**ECG** **AUTOMOTIVE ULTIMEDIA**  
Business Intelligence Global Business Intelligence



## Capacity Crisis & Efficiency Factor in FVL Europe

**ECG**  
Business Intelligence



**ECG**  
Business Intelligence

## Outlook 2023

Another year of drama?



**ECG**  
Business Intelligence

## Supply Chain Vulnerability Hits Industry

OEMs & Tier Suppliers Accelerate Vertical Integration Strategies

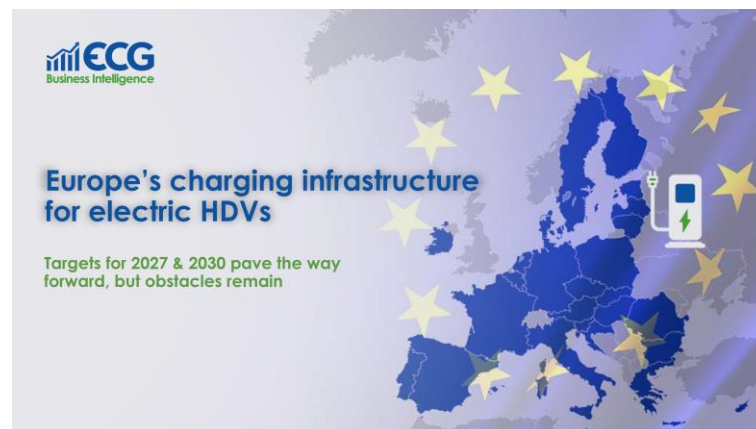
**ECG** **AUTOMOTIVE ULTIMEDIA**  
Business Intelligence Global Business Intelligence



## Finished Vehicle Exports from China Q1 2023

By Volume & Value

**ECG**  
Business Intelligence



**ECG**  
Business Intelligence

## Europe's charging infrastructure for electric HDVs

Targets for 2027 & 2030 pave the way forward, but obstacles remain



**ECG**  
Business Intelligence

## VUCA\* events hit, prices soar

Prices & Costs soar as war & Covid-19 hit supply chain

\* Volatile, Uncertain, Complex, Ambiguous

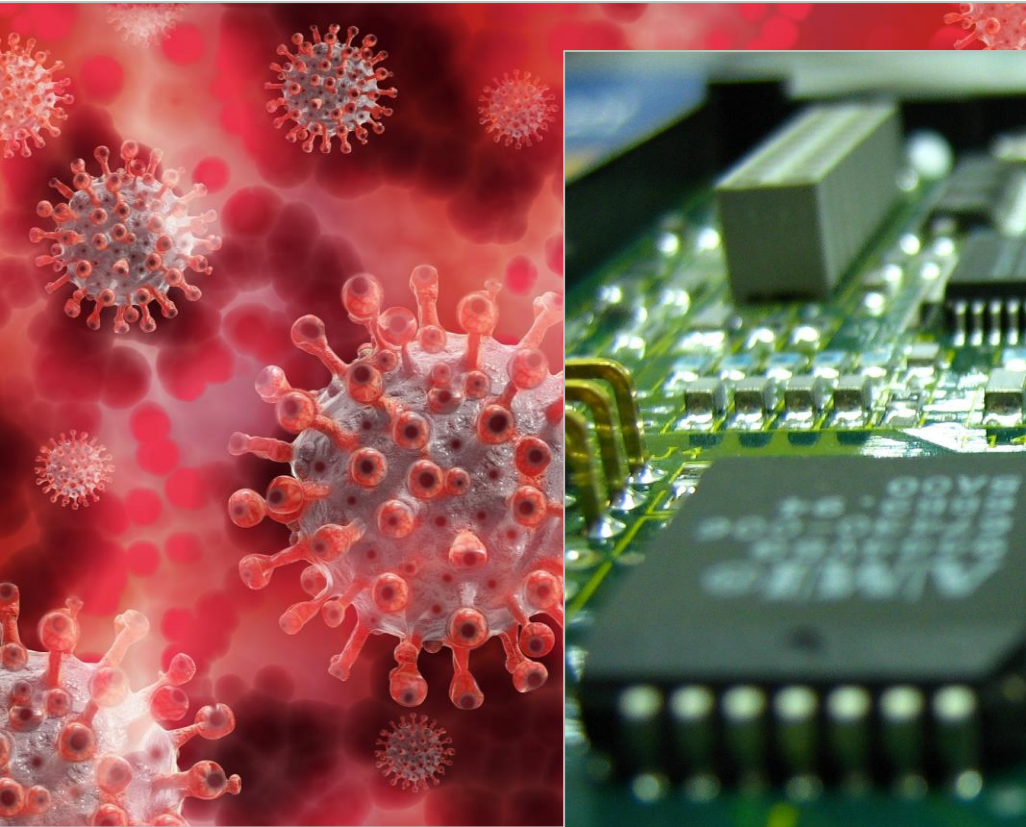
Presented by: Namrita Chow

**ECG** **AUTOMOTIVE ULTIMEDIA**  
Business Intelligence Global Business Intelligence

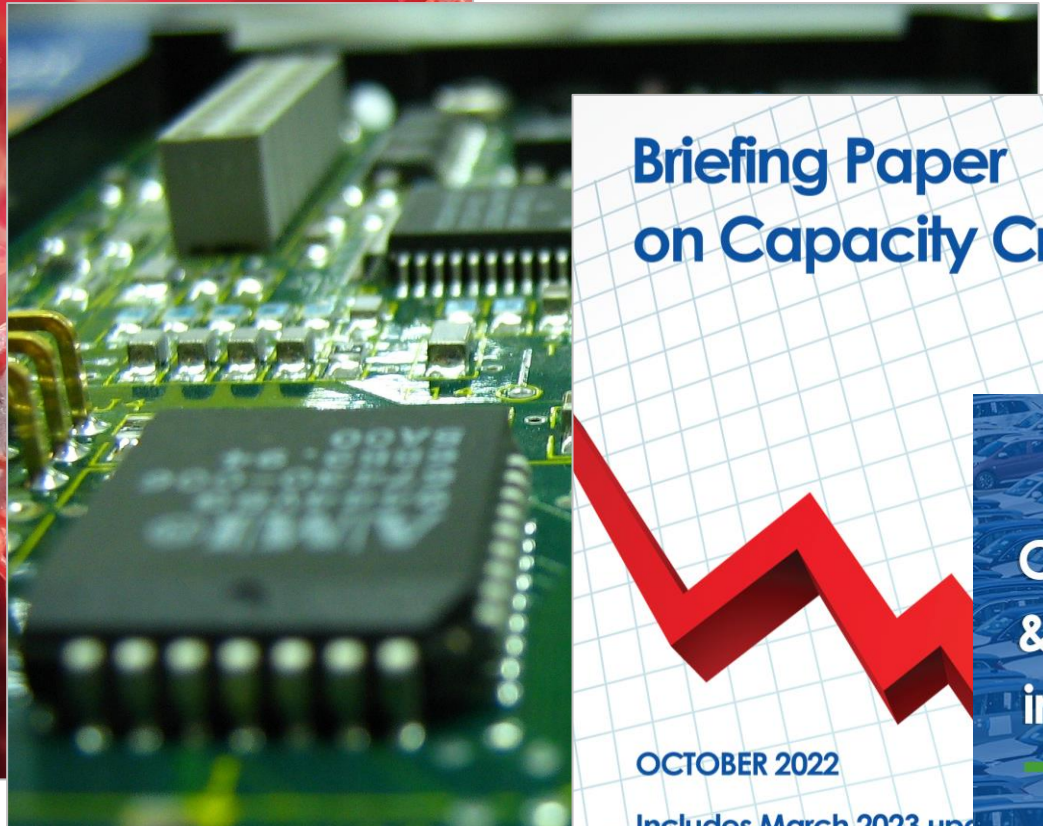


# From crisis to crisis

2020



2021



## Briefing Paper on Capacity Crisis

OCTOBER 2022

Includes March 2023 update



2022



## Capacity Crisis & Efficiency Factor in FVL Europe



# ECG Roadmap 2023

## INFORMATION & AWARENESS

- [ECG Website](#)
- [NEW ECG News page](#)
- [ECG LinkedIn & Twitter pages](#)
- [Briefing Papers](#)
- [President's Report](#)
- [Business Intelligence](#)
- [Industry topics page](#)
- [ECG Survey 2022-2023](#)
- [ECG Quarterly Survey](#)
- [Fuel prices](#)

## NETWORKING & INTEGRATION

- More than 140 ECG Members & Partners
- [ECG Academy Alumni Meeting, Barcelona, Spain, 9-10 February](#)
- [General Assembly & Spring Congress, Thessaloniki, Greece, 11-12 May](#)
- [ECG Conference, 12-13 October, Copenhagen, Denmark](#)
- [Maritime & Ports Working Group](#)
- [Eastern Europe Regional Meetings](#)
- [UK & Ireland Regional Meetings](#)

## EDUCATION

- [ECG Academy 2023/24 & 2024/25](#)
- [Negotiation Management](#)
  - Standard course
  - Advanced course 'Big Mountain'



## 2023 Strategic Objectives

- FVL Cost Index - Q1
- Emissions reporting standardisation - Q3
- Update the forecasting methodology - Q2
- Digital Vehicle Handover Standardisation

## LOBBYING & REPRESENTATION

- 2023 Dinner Debate
- [Lobbying campaign on Weights & Dimensions](#)
- [National legislations booklet will be updated](#)
- Co-operation with [ACEA](#), [ECSA](#) and other associations
- ECG is a member of [ALICE](#), [ASA](#), [DTLF](#), [ELP](#), [ESSF](#) and [IRU](#), among others

## STANDARDISATION

- Co-operation with [AIAG](#), [Odette](#) & the [VDA](#)
- Co-operation with [OEMs](#)
- [FVL Industry Meetings](#)

## Industry Working Groups

- **Capacity**
  - [Revision of Standard for forecasting developed for FVL sector](#)
- **Health & Safety**
  - [NEW Online Incident Reporting website](#)
  - [Safe Loading Guidelines in 13 languages](#)
  - [ECG Guidelines on Safe Yard Design](#)
  - Improving safety when delivering at retailers
- **Quality**
  - [ECG Visual inspection guidelines](#)
  - [Operations Quality Manuals](#)
  - [EMSA guidance document on Alternative Fuel Vehicles](#)
  - [Upcoming changes to the VDI standards on lashing of vehicles on board car transporters](#)
- **Sustainability**
  - Standardisation of emissions calculation & reporting in FVL
- **Digitalisation**
  - [ECG-Odette standard for VIN labels in the supply chain](#)
  - [KPIs for Finished Vehicle Logistics](#)
  - [Digital Vehicle Handover Processes](#)
  - [Standardisation of FVL Digital messages - version 1.1 available](#)
  - [Standard Connectivity audit for vehicle logistics sites - update will come soon](#)

## TRUCK



## SHIP



## COMPOUND



## RAIL



## BARGE

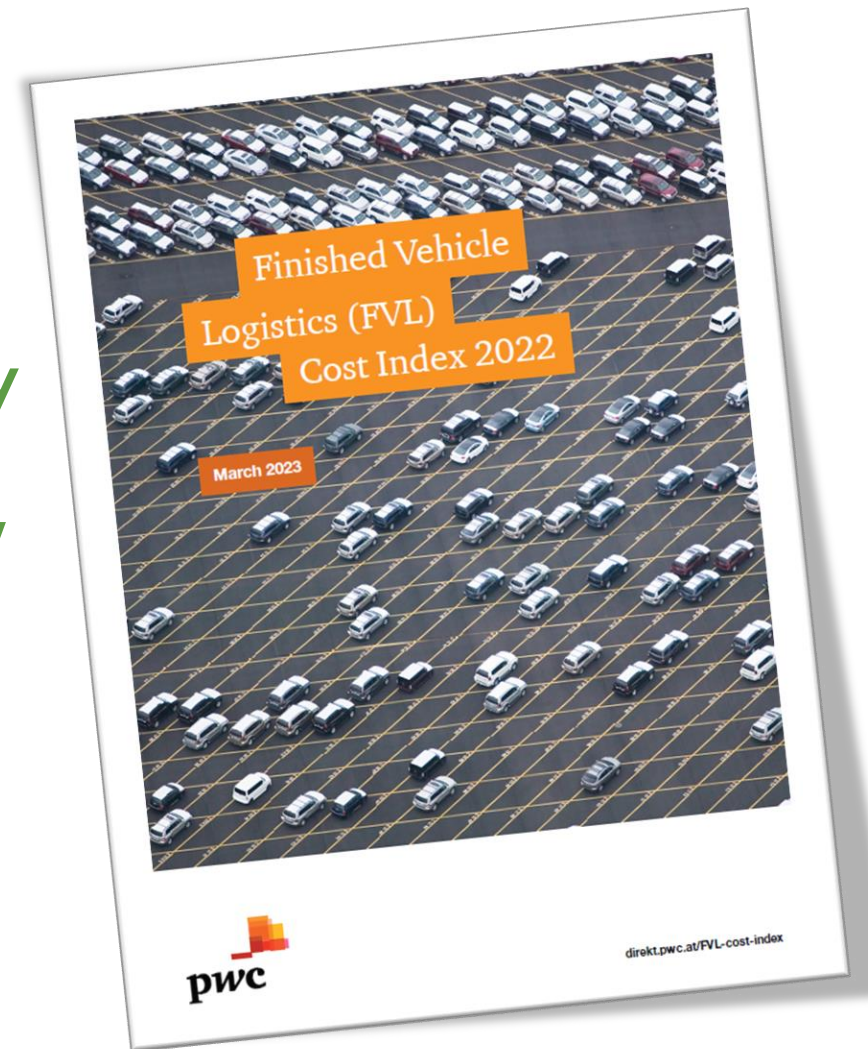




# FVL Cost Index

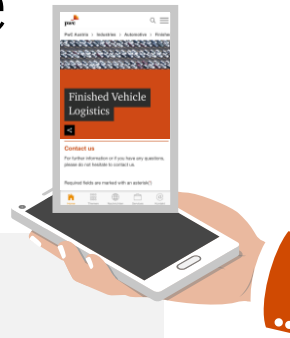
- Launched: **2 March**
- A new instrument to monitor the development of costs in FVL developed and issued by **PWC Austria and Germany**
- Outstanding support from **members** and from the Brussels office by **Namrita Chow** and **the ECG Academy**
- **Periodical updates:** 2 times a year
- More than 280 downloads!

**PwC will present tomorrow!**





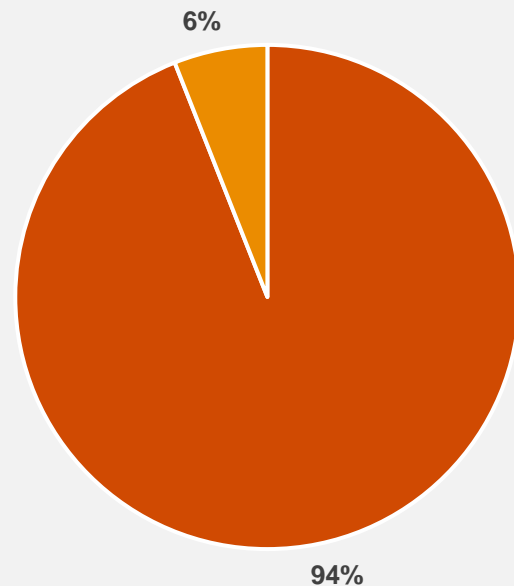
# Since the launch event on March 02, 2023, we have received over 270 report requests in total via the PwC landing page



# >270

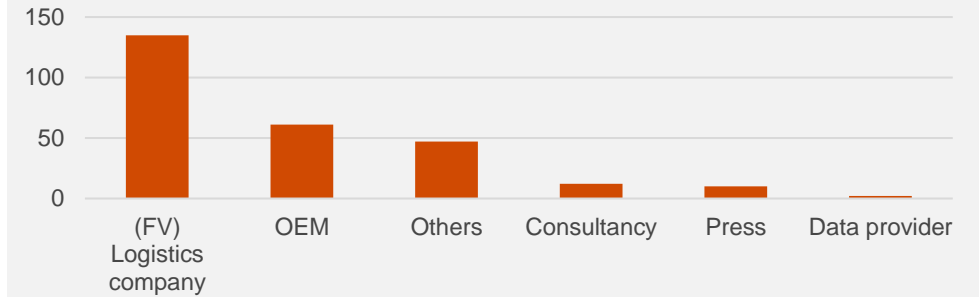
contacts in total via landing page including feedback, report and/or presentation requests and submitted questions up until now\*

### Contacts by contact reason (in %)

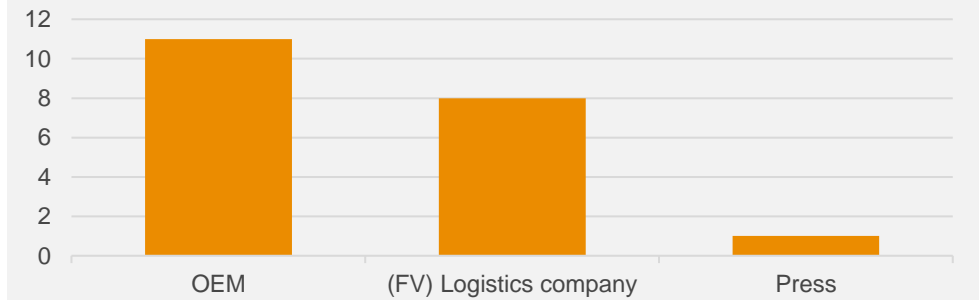


■ Report and/or presentation request ■ Question

### Requests by type of market participants (in # of requests)



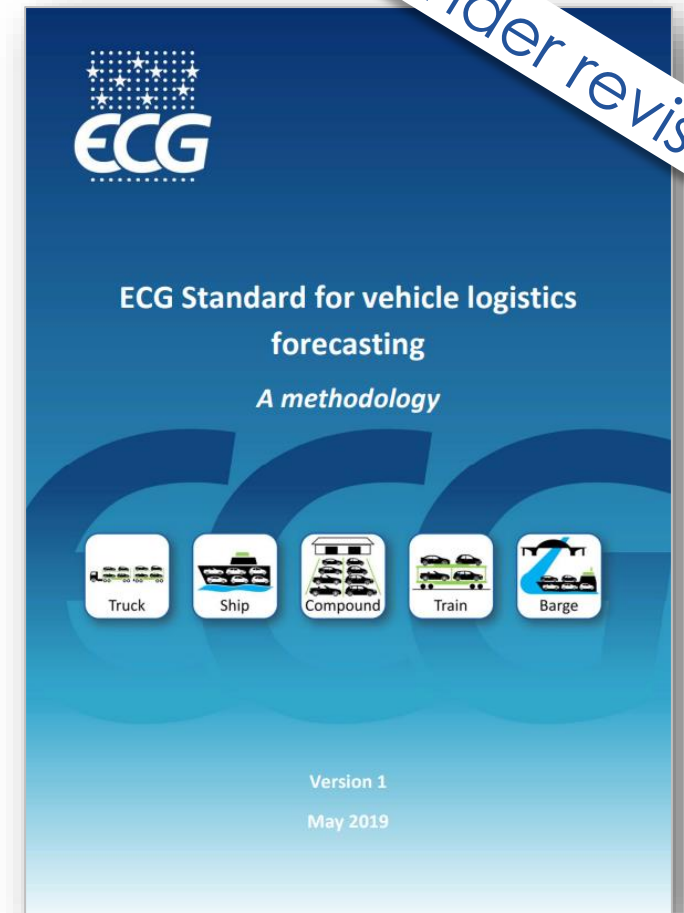
### Questions by type of market participants (in # of questions)



# Forecasting methodology update

- ECG started revision with ICDP in January 2023
- 7 OEM and 6 LSP interviewed – qualitative approach
- The revised document will incorporate contingency planning for a new environment

**Ben Waller will  
present tomorrow!**





# Emissions reporting standardisation

One industry,  
one methodology  
first results in Q3  
2023

Andreea Serbu will  
present tomorrow!

Press Release



**ECG** The Association of European Vehicle Logistics

**VDA** Verband der Automobilindustrie

**Cross-industry partnership to create the first standard methodology for automotive supply chain emissions calculation and reporting**

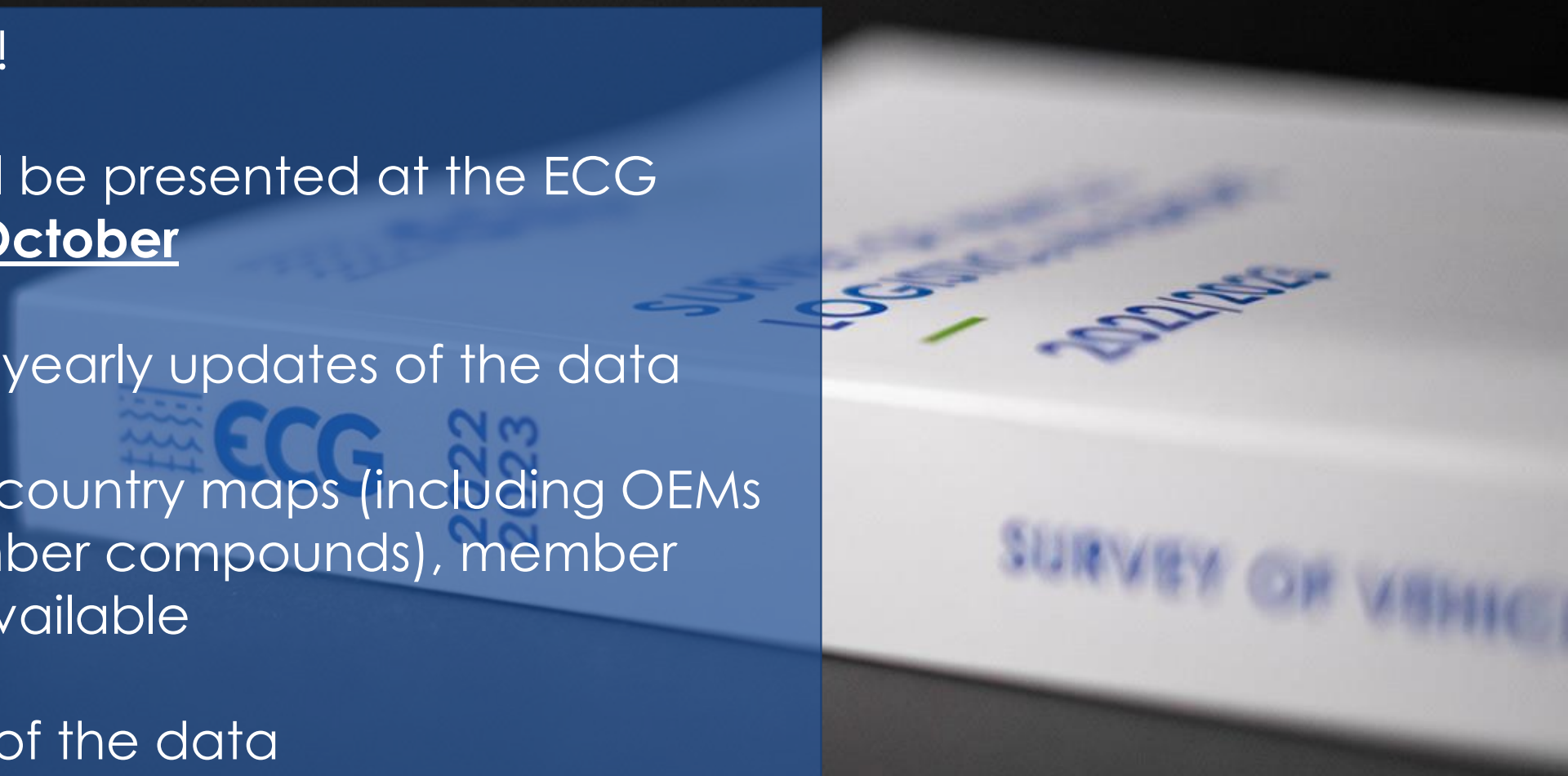
- ECG, VDA and other OEMs will develop the first methodology to calculate and report on automotive supply chain emissions
- The methodology will be based on the upcoming ISO 14083 standard
- It will be published in Q3 2023

Brussels and Berlin, Wednesday, 15 March 2023



# ECG Survey is changing!

- It is going digital!
- New website will be presented at the ECG Conference in October
- Permanent and yearly updates of the data
- Statistical data, country maps (including OEMs plants and member compounds), member profiles will be available
- Easy download of the data





Record attendance with 350 delegates, including 50 OEMs!

# ECG Conference 2022

Vienna

New opportunities in a challenging market  
Who will deliver your next car?

# 2023 Dinner Debate

21 March  
European Parliament

Host: **MEP Peter Lundgren**  
(ECR Group, Transport & Tourism Committee)

- ✓ Driver shortage
- ✓ More than **60** attendees
- ✓ Speakers from IRU, TME, Commission (driving license)







**Course 16 finishes today!**

**Course 17  
will start in October**

***Course almost full***



# THANK YOU!

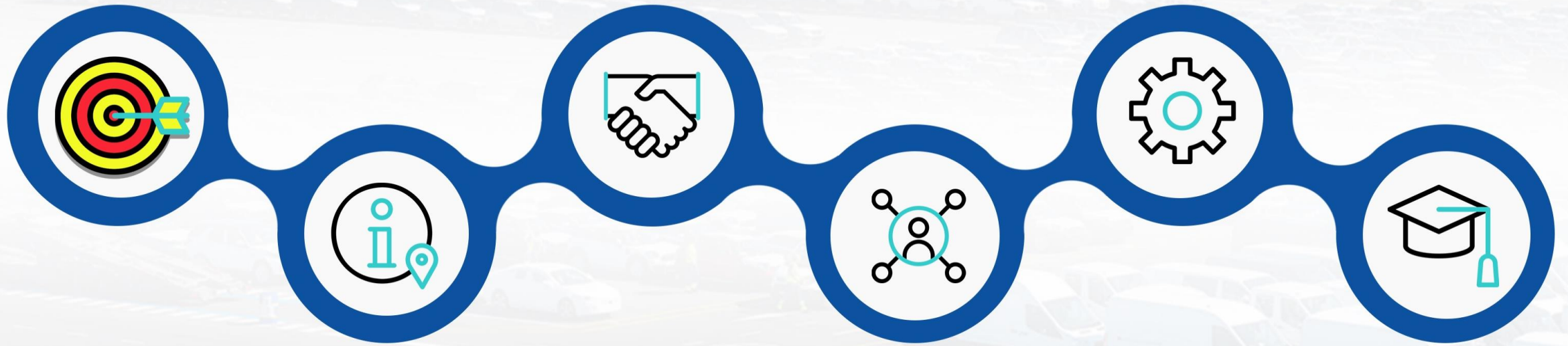
## STAY WITH US AND SEND US YOUR BEST PEOPLE







# Reports on Working Group activities



# Business Intelligence

Namrita Chow

Keeping Members Informed



## Europe's charging infrastructure for electric HDVs

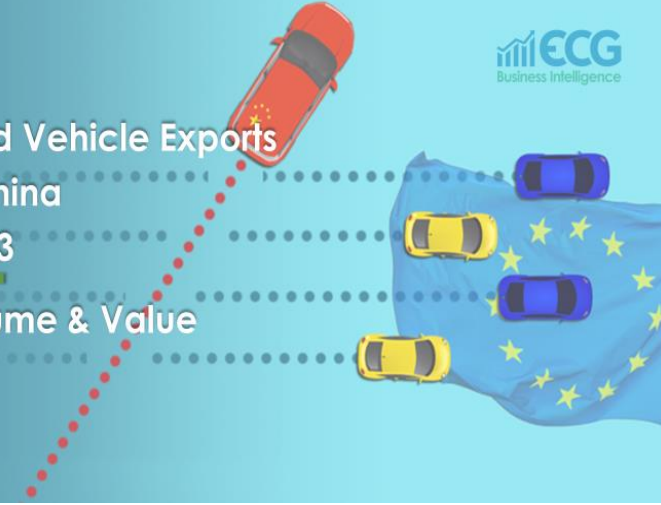
Targets for 2027 & 2030 pave the way forward, but obstacles remain



## Finished Vehicle Exports from China 2022 By Volume & Value



## Finished Vehicle Exports from China Q1 2023 By Volume & Value



## FVL Cost Index

Collating Indices across Shipping, Trucking, Rail & Compounds to build a tool for ECG Members

Part 1:  
Shipping & Trucking



## HORIZON EUROPE

Finding Relevant Calls 2023-2024



## Capacity Crisis & Efficiency Factor in FVL Europe



For background on Capacity Crisis in FVL please see [ECG's Briefing Paper](#)

Variety of topics, in-depth insights and intel for ECG Members on a regular basis....with follow-ups when required





Delivery Date	Quarterly Chinese Vehicle Export Updates
January '23	FY 2022 Finished Vehicle Exports from China ✓
April '23	Q12023 Finished Vehicle Exports from China ✓
July '23	Q2 2023 Finished Vehicle Exports from China
October '23	Q3 2023 Finished Vehicle Exports from China
January '24	Q4 2023 (FY 2023) Finished Vehicle Exports from China



Connecting YOU to the relevant people

Registration to open imminently

## Webinar scheduled for 22 June 2PM CET

Date	Speakers
22 June 2pm CET	<b>Fernando Liesa,</b> <b>Secretary General,</b> <b>ALICE</b>
22 June 2pm CET	<b>Jean-Marc Zaccardi</b> <b>Horizon Europe France,</b> <b>National Contact for Transport</b>
22 June 2pm CET	<b>Louise Mothersole,</b> <b>Horizon Europe UK National</b> <b>Contact for Mobility</b>
22 June 2pm CET	<b>Lucie Beaumel</b> <b>Director,</b> <b>2Zero</b>



# FVL Cost Index

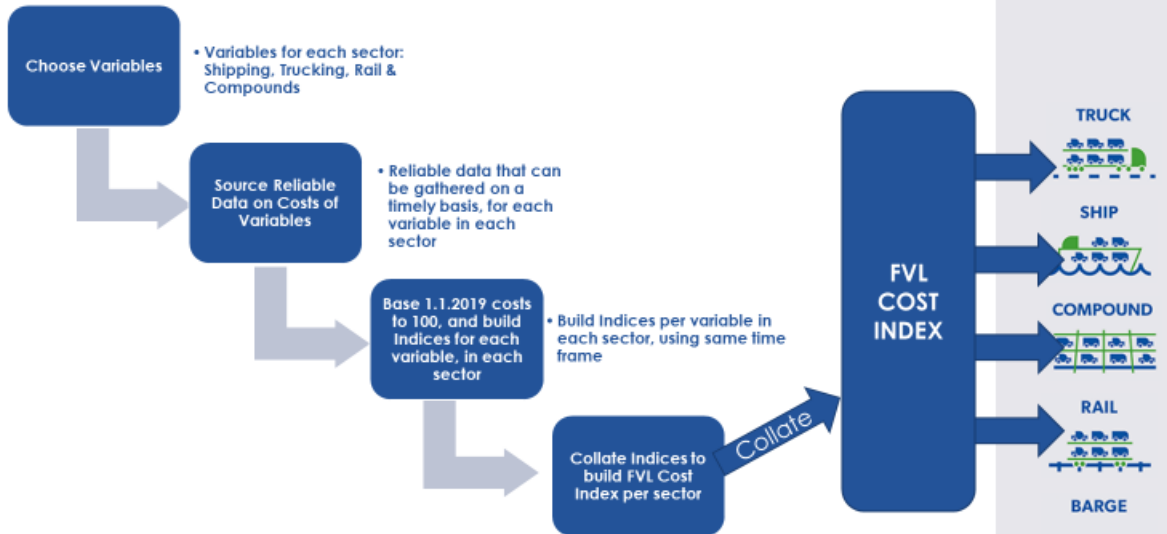
Collating Indices across Shipping, Trucking, Rail & Compounds to build a tool for ECG Members

Part 1:  
Shipping & Trucking



**Understanding Shipping Costs**  
Labour Costs, Charter Costs, Port Costs, Asset Costs & Maintenance

## The Process



**Understanding Trucking Costs**  
Generalised Trucking Costs (GTC)



Developing a method to produce an FVL industry relevant index



# Press Release



**Partnership: ECG supported by PwC Austria\* will develop first ever Finished Vehicle Logistics (FVL) Cost Index**

- ECG develops a new standard to create transparency in the FVL industry in Europe
- The FVL Cost Index will be differentiated by all modes of transports plus compound services
- The FVL Cost Index will be released first quarter 2023 with quarterly updates

Brussels, Wednesday 23 November 2022

ECG - The Association of European Vehicle Logistics is pleased to announce the development of an industry specific cost index for the finished vehicle logistics (FVL) sector supported by the consultancy PwC, represented by PwC Austria.

The first FVL Cost Index will be released in Q1 2023 with quarterly updates. It will be differentiated by four logistics sectors – road, rail, sea & compounds.

Partnership with PwC Austria established Q4 2022

To bring a reliable, regular, unbiased FVL Cost Index

We chose PwC Austria as our partner for this project



### ECG and PwC Austria publish the first ever Finished Vehicle Logistics (FVL) Cost Index

Brussels, Thursday 02 March 2023



## Finished Vehicle Logistics (FVL) Cost Index

We are pleased to publish the first European Finished Vehicle Logistics (FVL) Cost Index. The Association of European Vehicle Logistics (ECG), in collaboration with PwC Austria Advisory Services GmbH, hereinafter referred to as PwC Austria, has developed a cost index for the FVL industry





# Going forward:

- **Regular Business Intelligence Reports on RELEVANT INDUSTRY TOPICS**
- **ECG Members request topics of interest-please always send in your ideas!**
- **Work with INDUSTRY EXPERTS to bring the latest, most relevant information to YOU.**



# General Assembly & Spring Congress

11-12 May

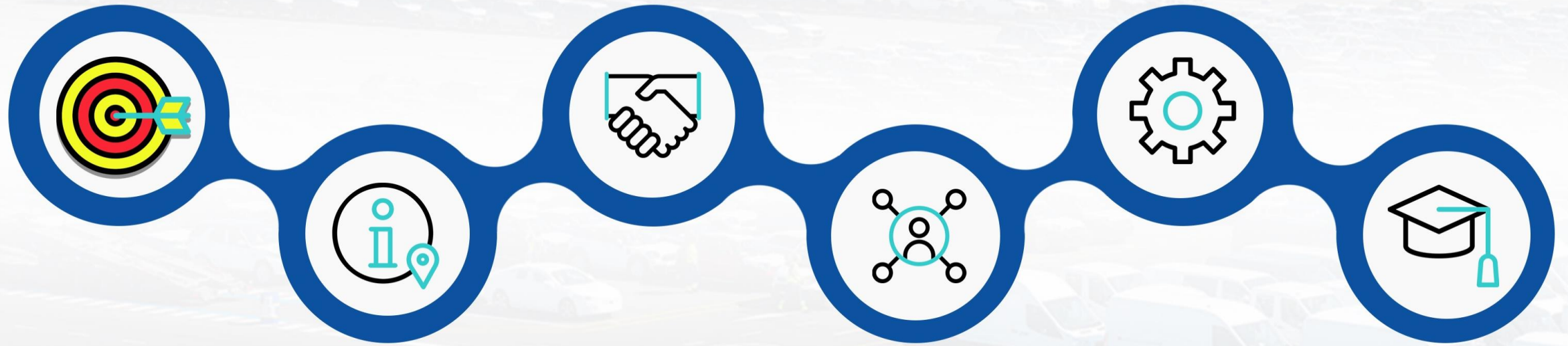
Thessaloniki, Greece

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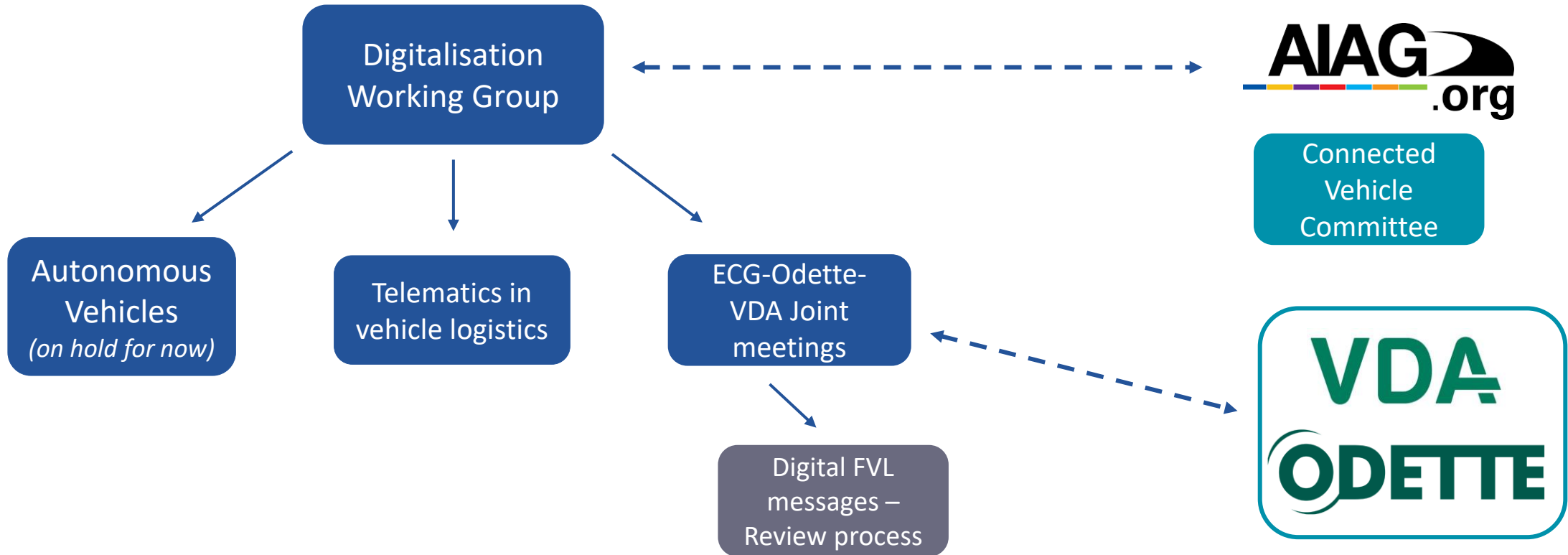
# Digitalisation Working Group

Michael Bünning

Hervé Moulin



# Digitalisation WG (DWG) structure



## Documents available:

- VIN labels in vehicle distribution processes (ECG-Odette document) **NEW!**
- Digital Vehicle Handover in FVL **NEW!**
- KPIs in FVL **NEW!**
- Digitalisation of Finished Vehicle Logistics (ECG, Odette, VDA)
- Connectivity of logistics sites
- Identification of Alternative Fuel Vehicles in the supply chain



# Last activities

- 28 June 2022: hybrid meeting of the Digitalisation Working group
- Topics of interest confirmed:
  - Telematics   Group ongoing – we'll report on it today
  - Used cars   Quality aspects of used cars will be discussed within the QWG
  - New distribution channels   Further information later today
- Group agreed also on the need to update the forecasting methodology   Project finalised – Ben Waller reports on it tomorrow



# Use of Telematics in the supply chain

- Steps in the project:

1. Inventory of telematics applications at dedicated webinars
  - 1) Road
  - 2) Rail
  - 3) Maritime & terminal
  - 4) Vehicle telematics
2. Synthetise the findings and start drawing up a use-case list and a data list
3. Final meeting for brainstorming and putting all together
  - **15 June in Brussels and online**
4. Facilitate dedicated companies to come together for proof of concepts/trials



# Digital messages

- ECG-Odette-VDA recommendation on standard FVL digital messages published in May 2020
- Recent developments:
  - OEMs already implementing the standard had some comments based on which version 2 will be published in Q3
  - Webinar will be held in September to brief the industry on the advancement of the OEM implementations and next plans (date TBC)



BMW and VW are currently in the implementation phase.



# KPIs for FVL

- Project launched April 2021, led by Odette and co-ordinated by ECG

## Objectives

- Avoid the need for LSPs to manage different KPIs from different customers
- Provide a standard benchmark against which all actors in the FVL process can measure their performance

## Result

- Final recommendation published in May 2022





# Standard VIN label in FVL

- Project launched June 2021, led by Odette and co-ordinated by ECG

## Objectives

- Define a standard location for the label
- Recommend a size and layout
- Define a minimum content (including 17-digit VIN!)
- Recommend a bar-coding standard

## Result

- Final recommendation published in December 2022





# Digital Vehicle Handover

- A strategic project of ECG in 2021-22 to standardise the digital handovers
- Purpose was to make sure that the available solutions on the market are **interoperable** and yield **comparable** results



- Two use-cases identified in the beginning:
  1. Visual vehicle handover inspection – the ‘booth’ yield hundreds of pictures of the car
  2. Fully automated **digital damage recognition**
- BUT: the group decided to concentrate only on the first use-case



# Digital Vehicle Handover

## Steps in the project

### 1 Output standard

- The group set a **minimum standard for the quality of images** produced in digital handover processes, in order to
  - enable (retrospective) review of vehicles
  - record damage and
  - substantiate liability
- Image specifications defined

### 2 Legal issues

- Main legal hurdle to acceptance of DVH solutions:
  - How liability for damages will be affected?
  - How will contracts need to be amended?
- Transport lawyer drafted a **legal protocol** with which both parties acknowledge the new situation (i.e. delay in submitting claims)

### 3 Digital damage recognition

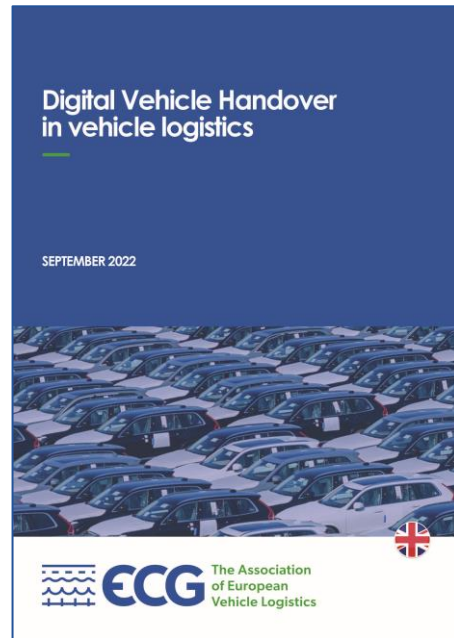
- Using 'AI' would allow immediate report any vehicle exceptions (damages).
- However:
  - a huge amount of data is needed to 'teach' the system
  - It would not be able to cope with dusty/snowy/wet surfaces...
- Digital damage recognition would only be possible at **end-of-line inspection**

Conclusion: in the supply chain these solutions will be used to assist with the visual vehicle handover inspections



# Digital Vehicle Handover

Final presentation on the project at  
the ECG Conference in Vienna



Project document published  
in September 2022



Timo Pasila  
(C.A.R Consulting)



Mark Morgan  
(UCM Global)





# Next steps: New distribution channels

Objective

Find solutions for the challenges of new distribution formats

Problem to solve

Many end-users/end-customers and many delivery ways. Real time information needed, etc.

Importance

Get the flow standardised/obtain customer satisfaction and increase profitability

Benefit for members

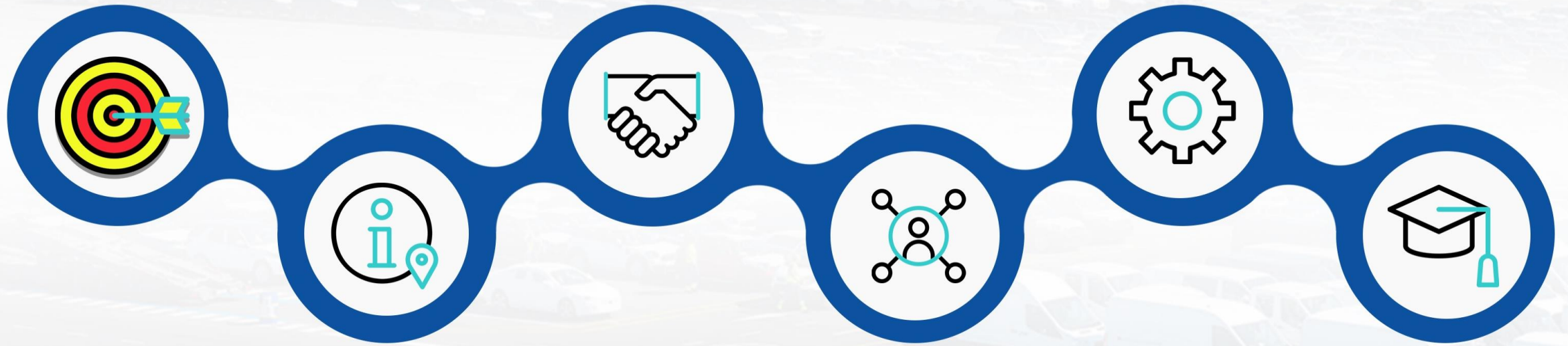
Standardisation/be ready when the market increases

Project timeline

Minimum 6 months

Interested in joining and helping shape the scope of this group?





# Sustainability Working Group

Mats Eriksson



# Sustainability Working Group

Mats Eriksson



# Main objective of the working group since 2021

Agree on a  
**standard methodology** to calculate  
emissions from FVL  
which gives  
**fair and equitable results**  
between and among  
different transport modes



# Activities up to now

**JAN 2022**

Proposal to create  
a cross-industry  
partnership with  
VDA

**APR, JUL, DEC  
2022**

- Meetings with LSPs, OEMs to develop the project brief
- Search & selection of supporting partner (ITCL gmbh)
- Project participation requested

**FEB 2023**

Official project  
kick-off





# Project at a glance

## Objective

Develop a guideline to calculate and report on **CO2e-emissions** for the **European automotive industry** as an industry **tailored addition to ISO 14083** applicable for all stakeholders of the automotive supply chain (inbound & outbound).

Incl. spin-off project on **Ro-Ro** with **Smart Freight Centre**

## Project organisation

4 strategic & conceptual working groups  
3 mode of transport working groups  
2 support  
Supported by external consultancy

## Project participants

ECG, VDA

OEMs BMW, Ford, Mercedes-Benz,  
Volkswagen GL, Toyota Motor Europe,  
Nissan, JLR

Suppliers & LSPs

## Timeline

Started in February 2023 running until  
September 2023

More about this from Andreea Serbu at the Spring Congress



# Project organisation

## Overall strategic & conceptual working groups

**WG 1:**  
Validation,  
Auditing,  
Reporting and  
Development  
Roadmap

**WG 2:**  
Automotive  
process model,  
reporting  
scope and  
system  
boundaries

**WG 3: Transport  
Operation  
Category  
principles &  
framework**

**WG 4: Emission  
allocation  
principles &  
framework**

## MoT specific working groups

**WG 5: Rail  
Transport**

**WG 6: Road  
Transport**

**WG 7: Sea  
Transport Ro-Ro  
(provided by  
ECG)**

## Consolidation working groups

**WG 8:  
Incorporation  
of external  
inputs &  
solutions**

**WG 9: Initial  
statements for  
non-focus  
MoTs**



# Thank you to members supporting

**ADAMPOL** SA  
vehicle logistics



**HÖDLMAYR**  
INTERNATIONAL

**MOSOLF**

**AXESS**  
LOGISTICS



**BLG** LOGISTICS



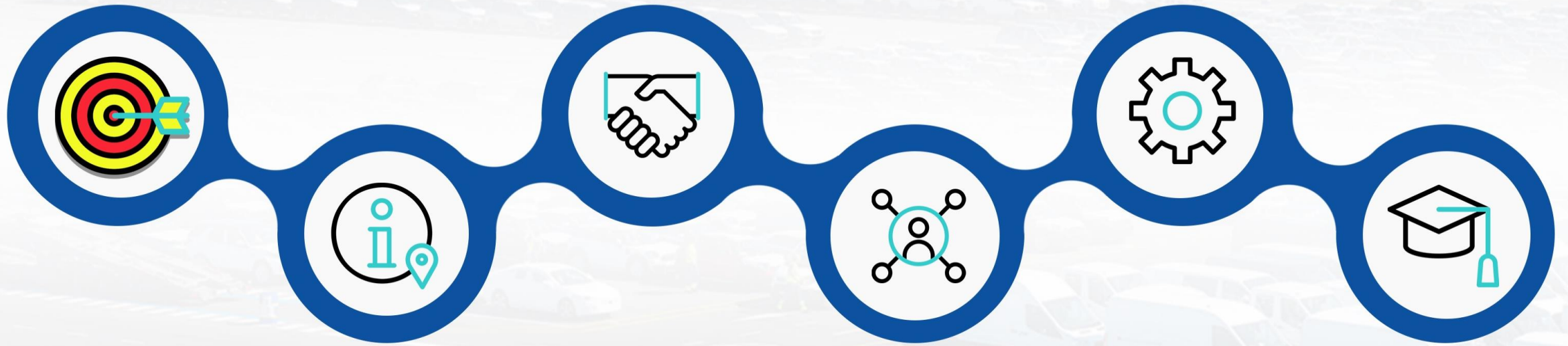
**Stena Line**



**SUARDIAZ**  
Shipping Lines







**EU Affairs**  
**Antoine Redier**

# Weights & Dimensions

2022-3  
Updates

Ongoing revision of the **Weights & Dimensions Directive** as part of the Green Deal

Alignment with European Commission:

- Reply to public consultation (Oct 2022)
- Input to DG MOVE study on our sector specifically (Q1 2023)
- Liaison with Member States started (e.g. France)

**Strong support from the Commission**

**Lobbying campaign on harmonisation of loaded length to at least 20.75m re-started**



# Weights & Dimensions

2022-3  
Updates

2 cases now reported in Italy (18,75m applied in international trips)  
Commission informed

1 TRASGRESSORE, Cogn. COROVITCHII

Nome ALEXEI C.F./P.I. Nato il 14 / 09 / 1991  
Nato a NOUA SULITA Prov. Stato MD  
Residente a SCANTEIA Prov. CAP Stato RO  
Indirizzo STR. EMIL CONDURACHI 525 M  F  P.G.   
Patente Cat. CE Num. I00557286S Rilasciata il 20 / 05 / 2021 Prov. ST Stato RO  Uso lento

Tipo veicolo	ATVT	Targa	B44DDM	Stato	RO	MCPC Kg	20500.0	Tara Kg	Peso Acc. Kg
Tipo veicolo	RIMS	Targa	B57PTN	Stato	RO	MCPC Kg	19000.0	Tara Kg	Peso Acc. Kg

OBBLIGATO IN SOLIDO  CRC  Loc  Prop. Cogn. PORTA AUTOVEHICULE DANY SRL

Nome C.F./P.I. Nato il / /  
Nato a Prov. Stato  
Residente a TIGANESTI Prov. CAP Stato RO  
Indirizzo STR 1 MAI 201 M  F  P.G.

Verbale a seguito di incidente con solo danni  con feriti

	Articolo	Comma	Ipotesi(1)	Pagamento in misura ridotta	3 punti decurtati
2) ha violato CDS <input checked="" type="checkbox"/> L.727/75 <input type="checkbox"/> 1) Vel. <input checked="" type="checkbox"/> Rim. <input type="checkbox"/>	61	7	1	430.00	pagato <input checked="" type="checkbox"/> 0
ALTRE norme <input type="checkbox"/> 2) Vel. <input type="checkbox"/> Rim. <input type="checkbox"/>	/	/	/		pagato <input type="checkbox"/>
Neopatentato SI <input type="checkbox"/> NO <input checked="" type="checkbox"/> 3) Vel. <input type="checkbox"/> Rim. <input type="checkbox"/>	/	/	/		pagato <input type="checkbox"/>

Descrizione infrazioni: 4 Totale da pagare 430.00 Tot. punti 0

ART. 61/7 CDS CIRCOLAVA ALLA GUIDA DEL COMPLESSO VEICOLARE INDICATO IMMATRICOLATO IN ROMANIA IN VIAGGIO COMUNITARIO DA SPAGNA A ROMANIA CARICO DI AUTOVETTURE VIOLANDO LE DISPOSIZIONI DELLA DIRETTIVA 2015/719 DEL PARLAMENTO EUROPEO DEL CONSIGLIO DEL 29/04/2015 CHE MODIFICA LA DIRETTIVA 96/53 CE RELATIVAMENTE ALLE DIMENSIONI DEI VEICOLI. NELLA CIRCOSTANZA MISURAVA COMPLESSIVAMENTE 20.50 METRI (SENZA TOLLERANZA) VIOLANDO QUINDI QUANTO PRESCRITTO NELL'ALLEGATE 1.1 DELLA SOPRA CITATA DIRETTIVA CHE IMPONE UNA LUNGHEZZA MASSIMA PER GLI AUTOARTICOLATI DI 18.75 METRI. LA PATENTE E LE CARTE DI CIRCOLAZIONE SONO RITIRATE FINO AL RIPRISTINO DELLA LUNGHEZZA ENTRO IL LIMITE INDICATO. CON VERBALE A PARTE VEICOLI SOTTOPOSTI A FERMO AMMINISTRATIVO PER 60 GGEX ART.116 DEL CDS.  
DICHIARAZIONI: NULLA

**HARMONISATION NEEDED**

# Weights & Dimensions

Next steps  
for 2023

- ❑ Expected proposal from the Commission on **21 June** – this should include EU harmonisation to 20.75m for loaded length car transporters
- ❑ Lobbying towards
  - ❑ European Parliament
  - ❑ Member States
  - ❑ European stakeholders in Brussels



# Weights & Dimensions

Next steps  
for 2023

- We need the support of each member towards its National authorities**
- Together we have the power to make the change happen**

# Dinner debate

21 March

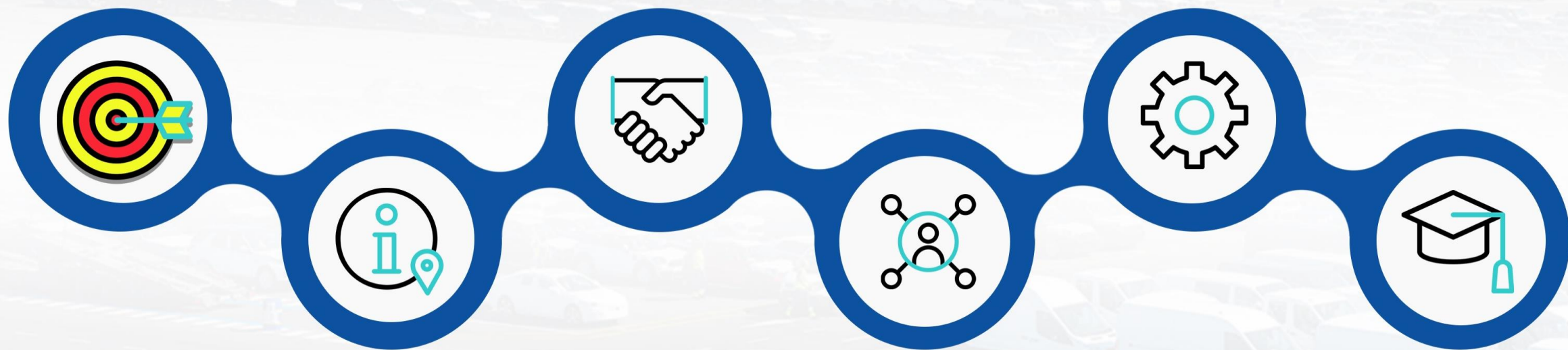
European Parliament

Brussels

- 60 attendees
- Hosted by former truck driver Peter Lundgren MEP
- Speakers from IRU, TME, Commission (driving license) and a car transporter driver

**2024 EU Parliament elections year > no dinner debate**





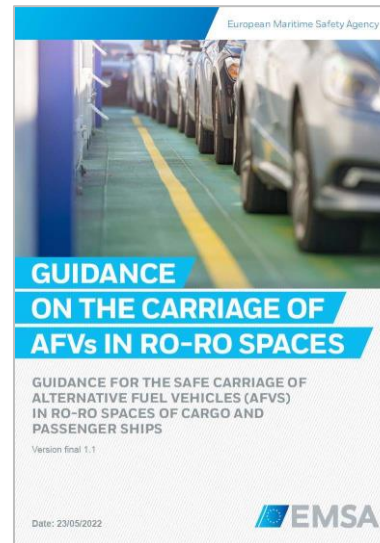
# Quality Working Group

Szilvi Kiss

# Activities in the last year

## Co-operation with EMSA

- Sifis Papageorgiou presented in Malaga
  - EMSA published the Guidance document on the carriage of AFVs in Ro-Ro spaces (end of May 2022)
  - ECG has been disseminating the document and will gather feedback for its possible future revision



## VDI lashing standard

- VDI standard 2700 will be changed
- Presentation at the GA in Malaga from Thorsten Ludwig & Silvia Freitas (TÜV Süd)
- Changes are still in the pipeline – updated standard will most probably be published in Q1 2024





# Activities in the last year

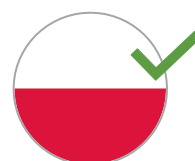
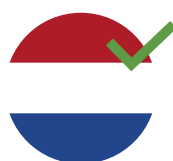
## OQM version 9

- Published in March 2022
- Translations provided by our volunteer member-translators throughout the year!



BLG

Noatum



HAROPA

Grimaldi

Mosolf & RPM

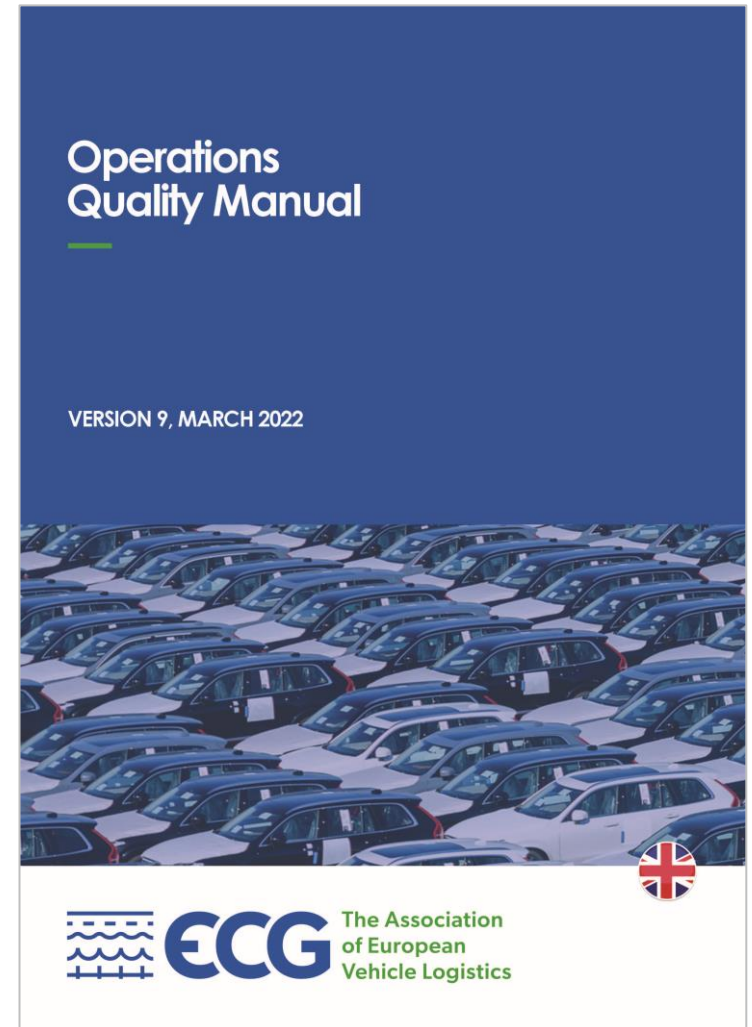
Adampol



Suardiaz

Rolfo

ANT Logistics



# Activities in the last year

## Hybrid meeting

25 January 2023

## Very good attendance

70+ participants - RECORD  
(LSPs, OEMs, Inspection companies)

## Next meetings

31 May 2023  
**Hybrid meeting again!**

November 2023  
*Date TBC*

## Current focus

- Keep OQM updated
- Alternative Fuel Vehicles
- Transport of cars in containers
- OEM parking requirements standardisation
- Co-operation with other associations:
  - VDA
  - AML
  - VDI
  - EMSA
  - Vehicle Carrier Safety Forum

## Future topics

Quality standards for used cars (in Q4)

**If interested in joining this initiative let us know!**



# Transport of cars in containers

## Activities

- Group formed in February
- Three meetings held so far:
  - Presentation from racking system provider
  - Presentation from container LSP
  - Presentation from a surveyor
- Goal is to provide minimum standards and good practices
- New [webpage](#) where related news items are listed

## Members

Adampol, ANT, CAR Consulting, CEVA Logistics, CFR Europe, Grimaldi, HAROPA, Lotus Cars, Lucid Motors, Marine Logistic & Control, Noatum, Renault, Sevatas, Tokio Marine, Toyota, UCM Global, VW

## Next steps

- Regular meetings will continue
- Chapter revised in H2 2023
- Completely new chapter is in the pipeline for the Operations Quality Manual
- Operations Quality Manual's v10 will then be published



The screenshot shows the ECG website interface. At the top left is the ECG logo with the text 'The Association of European Vehicle Logistics'. To the right of the logo are navigation links: 'About us', 'Activities', 'Publications', 'Industry Topics', and 'News'. A 'Log out' button with a user icon is in the top right corner. The main content area features a large image of stacked shipping containers at night, with a blue banner overlaid that reads 'Cars in containers'. Below the banner, the breadcrumb path 'Home > Cars in containers' is visible. The main text of the article reads: 'ECG is monitoring the developments around the growing number cars shipped in containers. Below you may find all the recent information from ECG News.' At the bottom of the article, it states 'Latest update on 03 May 2023'.

# Developments related to Alternative Fuel Vehicles (AFVs)

## EMSA Guidance on AFVs

- Published last May by EMSA and widely publicised by ECG since then
- The document might be revised depending on the **Lashfire** project results (ending in August 2023!)

## State of charge level requirements of OEMs and shipping lines

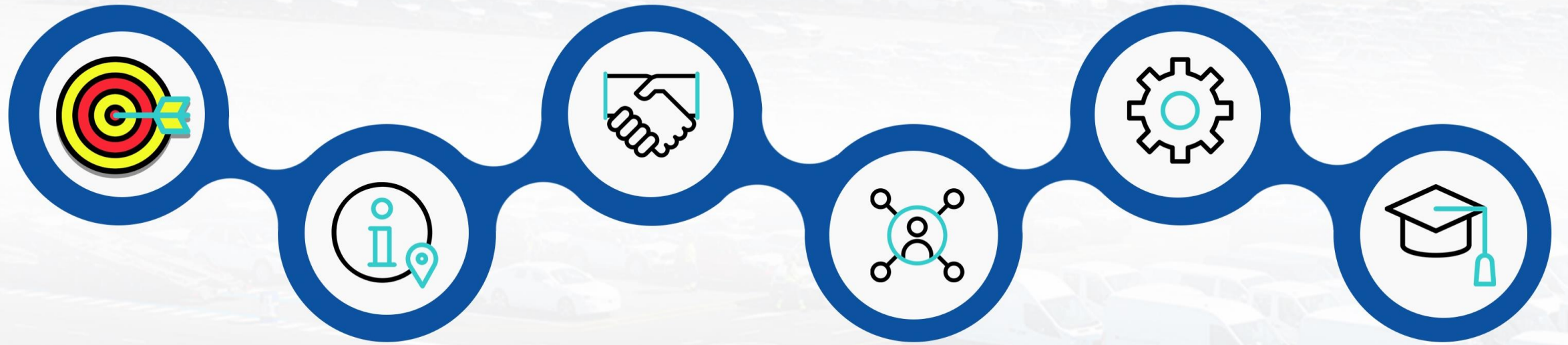
- This information is currently gathered for a better understanding of the various practices
- It will soon be published

## Visual identification of AFVs

- ECG's own recommendation is available for labelling
- Or ECG-Odette standard on the VIN label contains the fuel information!

Volvo has already taken this recommendation on. Implementation of the new VIN labels is expected to begin in Q2 2023 and to start appearing in their various vehicle flows in Q3.





# Health & Safety Working Group

Bjorn Svenningsen

# H&S WG – Members



**GROUPE  
RENAULT**

STELLANTIS



**TOYOTA**

**ADAMPOL SA**  
vehicle logistics



**AXESS**  
LOGISTICS

**BCA** / **AUTOMOTIVE**

**CEVA**  
LOGISTICS

**ecm**  
Vehicle Logistics Network

  
GRIMALDI GROUP



**HÖDLMAYR**  
INTERNATIONAL

**KOOPMAN**

**Stobart** Automotive

**TRADISA**

**Kässbohrer**  
Driven by professionals®

**Lohr**

**Rimo**

**ROLFO**

Thank you!





# H&S WG – Structure

SG1

Key Accident Learning & Sharing

Philippe Nelain  
*Renault Groupe*

SG 2

Safe loading

METHOD/MAN

Ivan Diaz  
*Tradisa*

SG 3

Safe yards

ENVIRONMENT

Girolamo Carignani,  
*Grimaldi Group*

SG 4

Safe retailers

ENVIRONEMT

Kurt de Vooght  
*Stobart*  
Simon Todd  
*BCA*

SG 5

Safe trucks

MACHINE

Markus Formann,  
*Hödlmayr*

# SG1 – Incident reporting

## Yearly reports

### Incident reporting website

File a new Incident report form

View all incident reports

Read the instructions

Edit your profile

Report on your 2023 severe incidents and near-misses

Making the industry safer -  
Reducing accidents in FVL

2019 incidents & analysis

OCTOBER 2020

Making the industry safer -  
Reducing accidents in FVL

2020 incidents & analysis

Making the industry safer -  
Reducing accidents in FVL

2021/22 incidents & analysis

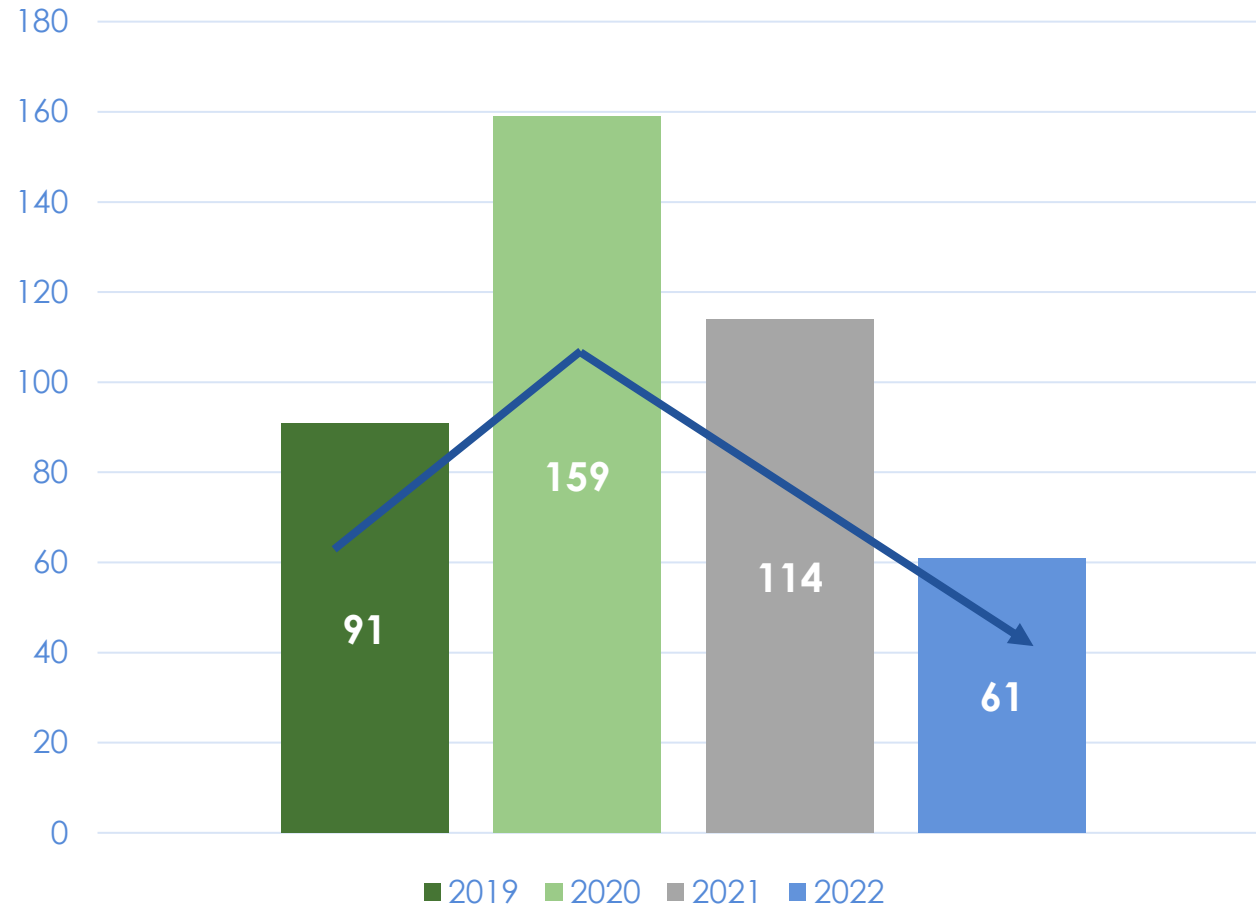
MAY 2023



 The Association of European Vehicle Logistics

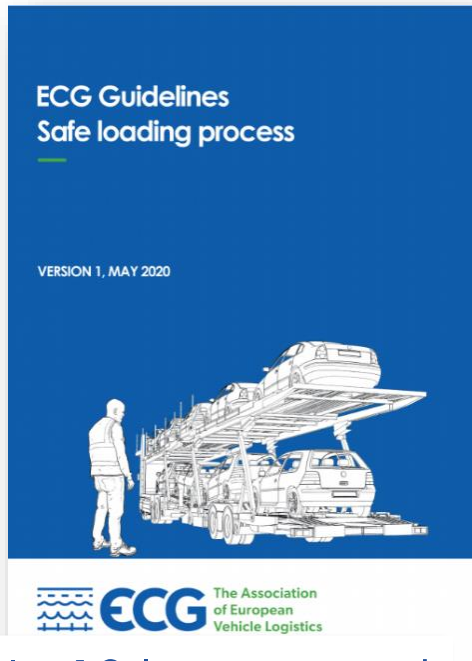


# Incidents reported throughout the years



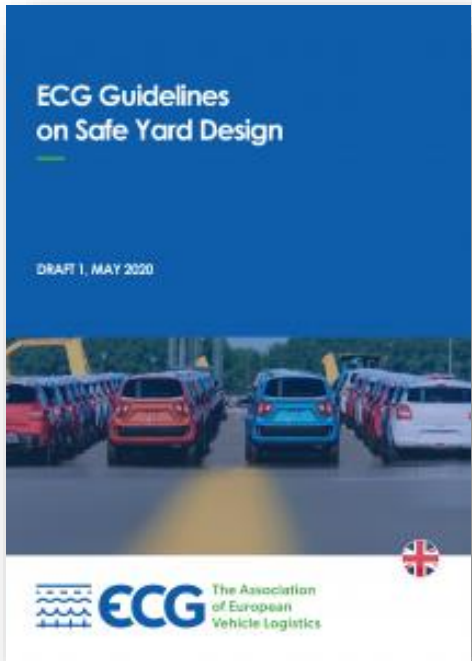
# H&S SG – what we have done so far

## SG 2 – Safe loading

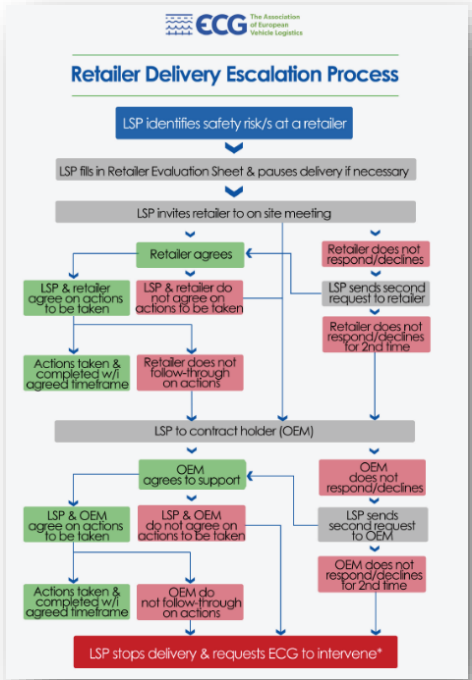


In 13 languages!

## SG 3 – Safe yards



## SG 4 – Safe retailers



## SG 5 – Safe trucks

Each Key Point of Loading Std      Probability & Risk x Truck → Safety features

Step	Sub-Step	Key Risks	C <sub>1</sub>	C <sub>2</sub>	C <sub>3</sub>	Truck Specific Features	P <sub>1</sub>	P <sub>2</sub>	P <sub>3</sub>	R <sub>1</sub>	R <sub>2</sub>	R <sub>3</sub>	Notes
4 - Load Deck	1 Drive unit on to truck	Drive off	5	3	3	Drive off	5	3	3	15	9	9	
	2 Re-align deck if unit not parked OK	All load on structure	3	3	3	Drive off	5	3	3	15	9	9	
	3 Secure & rest unit	See Risks for 2.3.2.4.1 Slip, trip, fall (no room to step out)	3	3	3	Slip, trip, fall (no room to step out)	3	3	3	9	9	9	
	4 Apply chock	Slip, trip, fall (during chocking) Fall from height/low of deck	3	3	3	Slip, trip, fall (during chocking)	3	3	3	9	9	9	
	5 Lash axle before releasing unit	Slip, trip, fall (no room to step out)	3	3	3	Slip, trip, fall (no room to step out)	3	3	3	9	9	9	

Key Risks & Consequences → Industry Knowledge (Accident Reports)

List of safety features (From mfrs.)







# Maritime & Ports Working Group

## Oliver Fuhljahn

# ECG Maritime & Ports meetings



24-25 October 2022,  
Port of Antwerp



- 42 participants attended

## Topics discussed:

- Innovation in terminals and car transport
- Pilot Exemption Certificates
- EU Funded project: PIONEERS
- Carriage of Alternative Fuel Vehicles (update of EMSA paper)





# ECG Maritime & Ports meetings



14-15 March 2023,  
Port of Vigo

- Record attendance! – 50 participants attended the meeting

## Topics discussed:

- Congestion issues, Capacity crisis, Docker shortage
- Cars in containers
- New EU regulations – EU ETS, FuelEU Maritime
- Update on ECG activities

**BERGÉ**  
Moved by Logistics

**SUARDIAZ**  
Shipping Lines

**TERMICAR**  
Termicar VIGO, S.L.

**QUECC**

**Port of Vigo**  
Port Authority of Vigo



# M&P WG focus areas 2023-2024

## Congestion issues

Long waiting times at European ports.

## CARBON NEUTRALITY

Ports share plans to achieve carbon neutrality and discuss opportunities

## FAIRNESS

Level playing field between loading/unloading trucks and barge at Ro-Ro terminals

## GREEN INVESTMENT

EU funding (Horizon Europe), ECG webpage, Business Intelligence

## STANDARDISATION

- Emissions reporting
- Instructions on handling maritime transport of EVs

## LACK OF PORTS INFRASTRUCTURE AND PERSONNEL

ECG guidelines to improve throughput at terminals and compounds



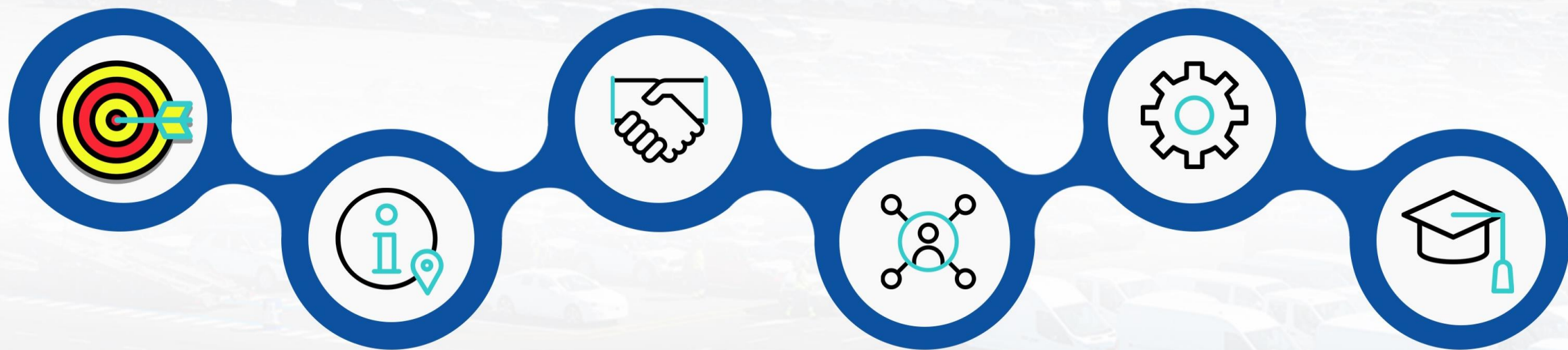
# Next meetings

Maritime & Ports WG Meetings will be held **3 times per year**



## Bristol Port

28 – 29 June 2023



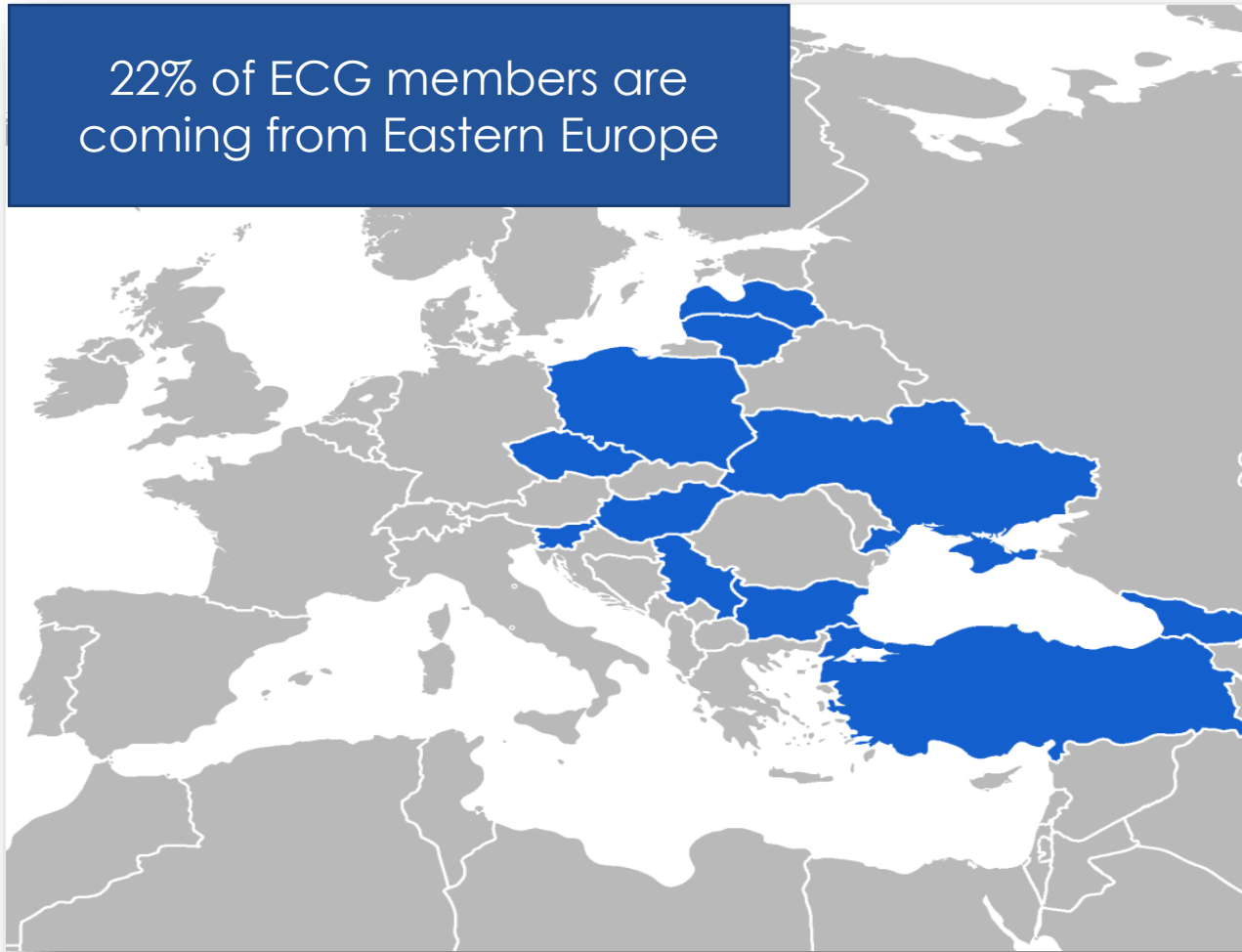
# Eastern Regional Meeting

## Krzysztof Szeligowski



# Members

22% of ECG members are coming from Eastern Europe



Country	ECG members
Bulgaria	1
Hungary	1
Latvia	2
Lithuania	10
Poland	4
Russian Federation	1
Serbia	1
Slovakia	1
Slovenia	1
Turkey	3
Ukraine	1
<b>Total Members</b>	<b>26</b>

# Summary of the activities 2022-2023



Record attendance – 64 participants!

## Topics covered:

- Update on market situation in Eastern Europe
- Capacity crisis and driver shortage, Emissions reporting, Forecasting, FVL Cost Index
- EU Legislation: Cabotage & posted workers, Loaded length, eCMR
- Update on ECG activities: ECG strategic objectives, update on working groups, events and education

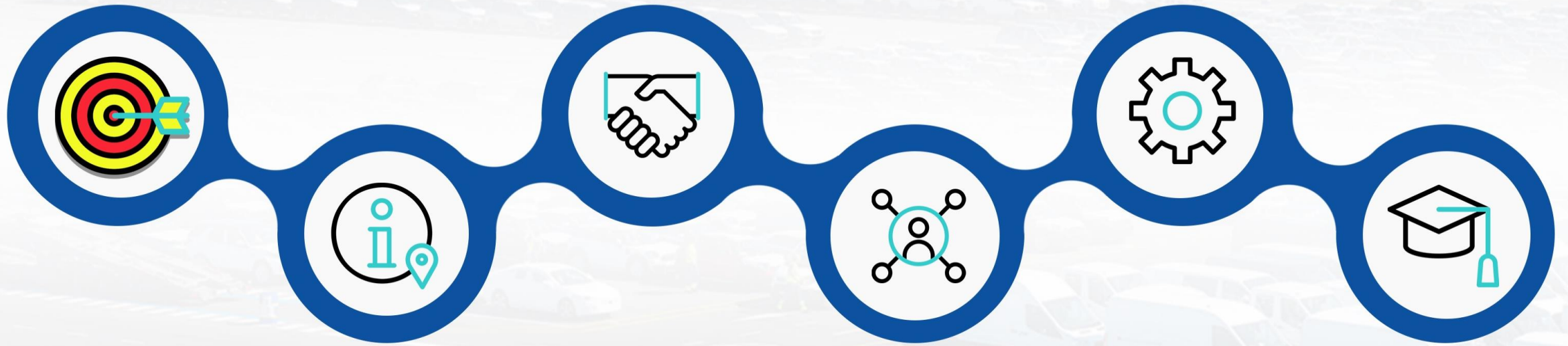
# Our meetings

2 times per year

Place	Date	Guests	Sponsors
Sofia, BG	25/09/14	35	
Koper, SI	23/04/15	43	 
Istanbul, TK	17/09/15	50	  
Gdańsk, PL	23/04/16	47	  
Kyiv, UA	22/09/16	42	
Vilnius, LT	20/04/17	56	
Warsaw, PL	21/09/17	49	
Zagreb, HR	19/04/18	49	
Budapest, HU	19/09/18	55	 

Place	Date	Guests	Sponsors
Kaunas, LT	25/04/19	58	
Vienna, AT	19/09/19	42	
Online	17/09/20	36	No sponsor
Online	22/04/21	41	No sponsor
Katowice, PL	23/09/21	39	
Bratislava, SK	28/04/22	34	No Sponsor
Bucharest, RO	8/09/22	30	 
Gdańsk, PL	27/04/23	64	
Riga, LT	TBD		





# UK & Ireland Meeting

Mark Hindley

# Market update 2023



## SMMT 2023 Forecasts

New Car Market April YTD, 627K +16.9% v LY

2023 Year forecast - c.1.9 million

New entrants, BYD, Ora, Maxus

Fleet Sales +39%, Retail flat

BEV segment + 25%, but slowing

UK Production 2023 year forecast – c.0.9million



# Group update

- Group comprises 13 member companies representing c. 80% of an estimated total market of +3m new car & LCV movements
- Meetings 3 or 4 times yearly  
Increased member participation and attendance, including OEM
- Next meeting 24<sup>th</sup> August @ JCB Factory  
Meeting planned November in London with Dinner
- Developed relationships with SMMT, RHA and DFT

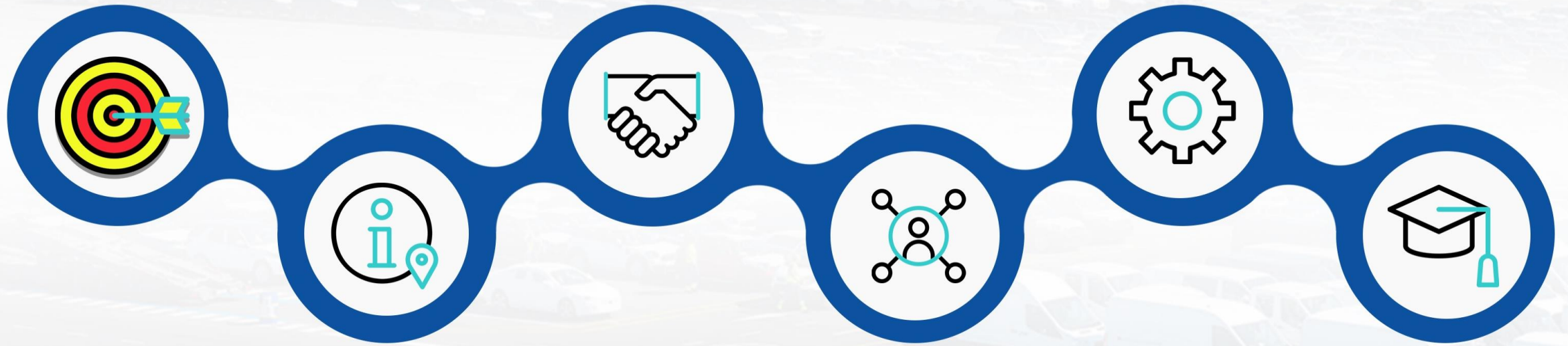




# Group objectives

- Promote the interests of UK and Ireland members to industry stakeholders and policy makers.
- Ensure the interests of members are represented at national level on all key issues affecting our industry.
- Foster relations with other specialist groups and associations to help support common objectives.





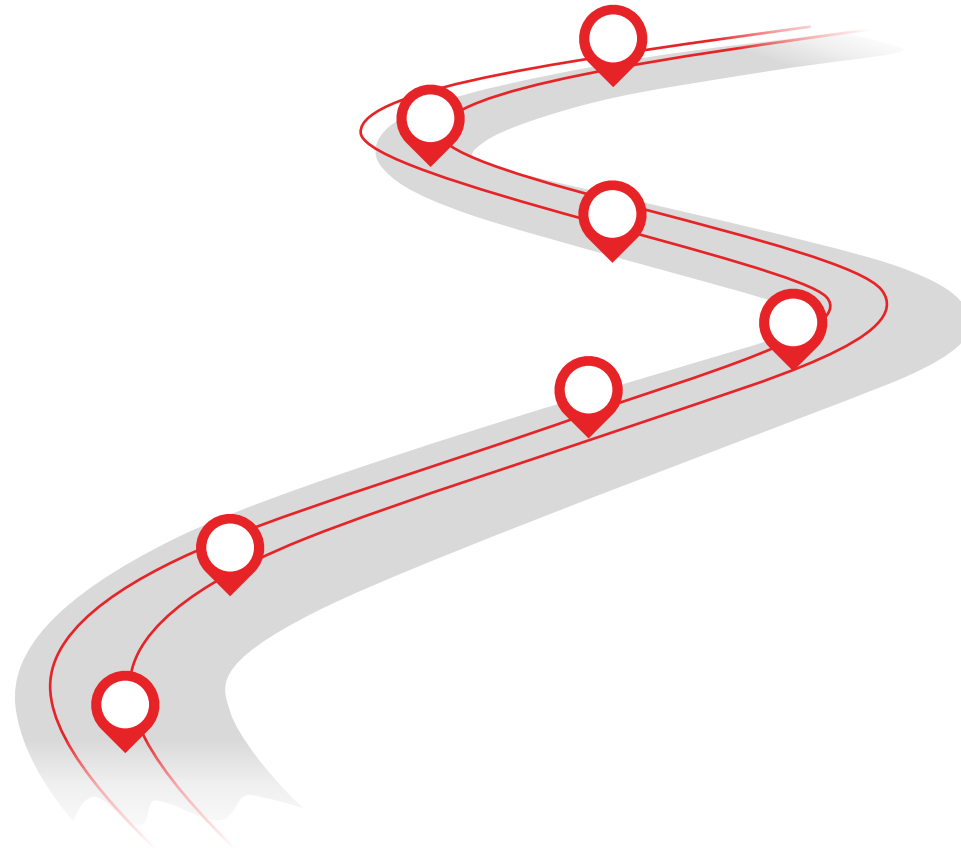
# ECG Education

Chris Klaiber & Mike Sturgeon

# THE ECG ACADEMY COURSE 16

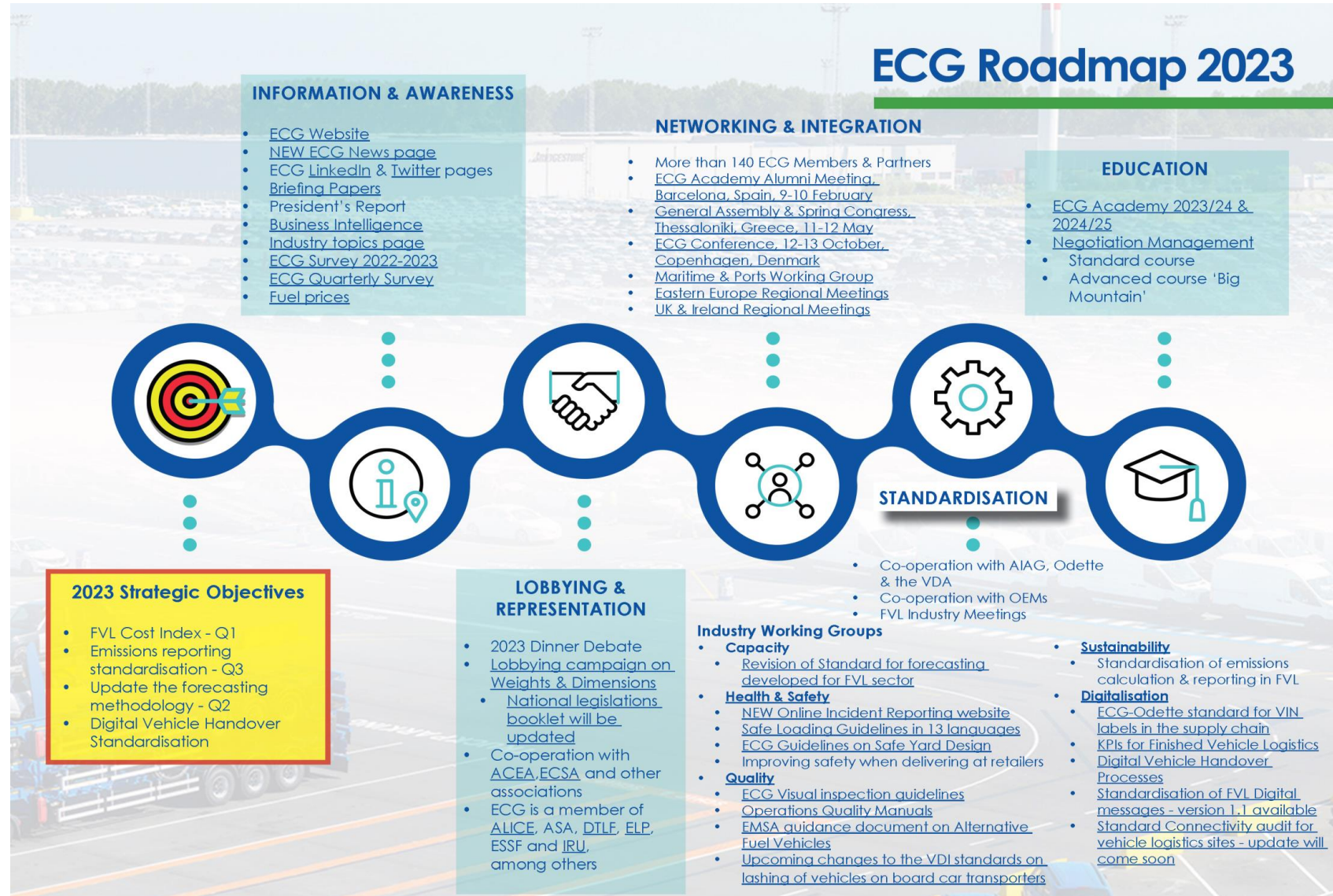
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GENERAL ASSEMBLY





# THE ECG ACADEMY IS PART OF THE ECG ROADMAP:



# CLEAR ROLES WITHIN THE ECG ACADEMY...

...to ensure the success and the sustainability of the program for the participants.

## Dean of the Academy

---



**Prof. Dr. Fridtjof  
Langenhan**

## Academy Advisory Board

---



**Prof. Dr.  
Reinhard Prügl**



**Mr. Wolfgang  
Göbel**



**Mr. Mike  
Sturgeon**



**Ms. Hilke  
Steffens**

## Director of the Academy

---



**Dr. Christian-  
Titus Klaiber**

## Academy Administration Head

---



**Ms. Joyce Holler**

## Heads of Learning, Development & Examination

---



**Ms.  
Miriam  
Förch**



**Ms.  
Verena  
Ege**

# LEARNING...

...is based on a tried and tested best practice concept: To know, understand and apply immediately.

Know



- Knowledge input
- Keynote lectures
- Research results



Understand



- Examples
- Best practice
- Interchange



Apply



- Discussion
- Case studies
- Group work
- Skills practice
- Presentation



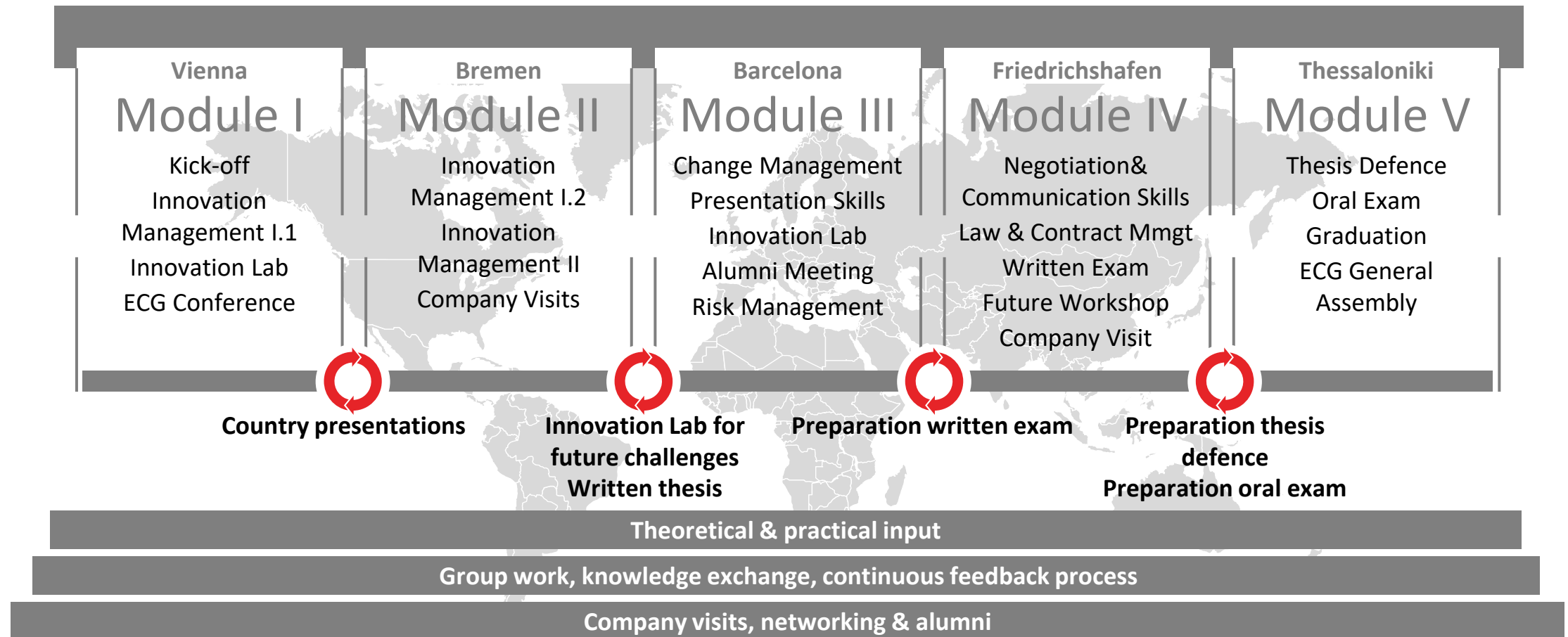
Learn



- Being enabled, inspired and motivated to make a difference



# ECG Academy



# THE LEARNING TARGETS FOR MODULE I - V ARE AS FOLLOWS:

## Learning target module I

- Innovation Management I
- Keynote lectures on: ECG, Rail, Green Deal & Innovation
- Group work & networking at the ECG conference

## Learning target module II

- Innovation Management I & Innovation Management II, country presentations
- Company visits & group work & networking

## Learning target module III

- Presentation Skills & Change Management
- Risk Management
- Company visits & group work & networking

## Learning target module IV

- Negotiation & Communication skills
- Law & Contract Management
- Written examination, company visits

## Learning target module V

- Thesis defence
- Oral examination
- ECG graduation ceremony & networking at the ECG Spring Congress

# AND AT THE END...





# THE ECG ACADEMY AWARDS

## Giovanni Paci Award

*For the best student of the academic year*



## Prof. Dr. Josef Decker Award

*For the best innovation lab for future challenges group presentation*



## ProAct Award

*For the best thesis in the field of information technology*



# THE ECG ACADEMY WISHES TO THANK ALL OF THE FOLLOWING COMPANIES & INDIVIDUALS BEING A GREAT SUPPORT IN 2022/2023

Module I  
Vienna



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**DB Cargo Logistics GmbH:** Karl Gümpel

Module II  
Bremen



---

**ProAct:** Christian Fuss | Paul Nurse

**BLG:** Patrick Güth | B. Husemann | Angela Bartke

**Cuxport:** Oliver Fuhljahn & Julian Brütt

Module III  
Barcelona



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**Port of Barcelona:** Lluís Paris & Anna Llisterri

**Innovation Lab Presentation:** ECG Board

Module IV  
Friedrichshafen



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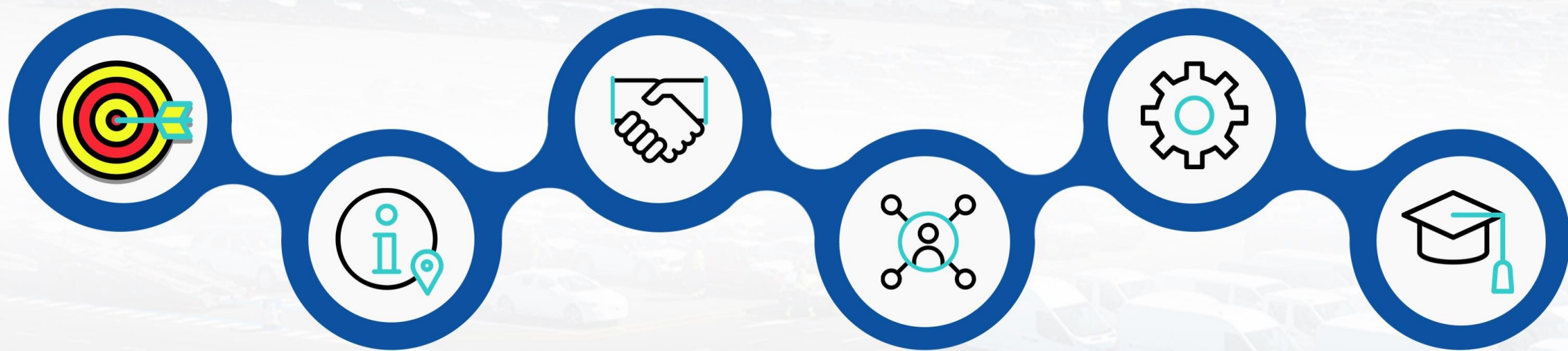
**Mosolf:** Dr. Mosolf, Wolfgang Göbel & Tom Zielke

Module V  
Thessaloniki



**For Next Years Application – please  
contact Mike Sturgeon**





# Communications & events

Panagiota Sdoukou

# Communications



TRUCK



SHIP



COMPOUND



RAIL



BARGE



Communication works  
for those who work at it.

John Powell



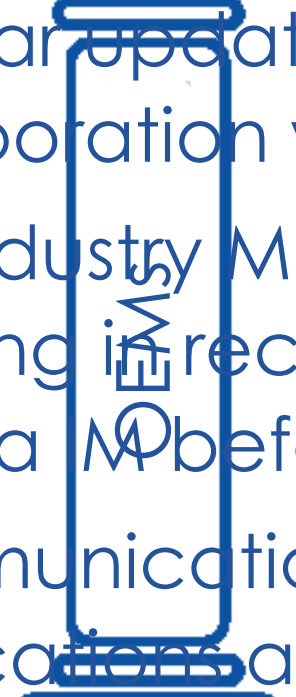


- Weekly ECG News newsletter
- President's reports
- Monthly Working Group updates
- Communications on ECG's publications (ECG Business Intelligence, Briefing reports etc)
- News from ECG
- Communications on ECG's activities and events
- Working Groups communications







- 
- Regular update of OEMs contacts lists in collaboration with the ECG Board
  - FVL Industry Meetings communications resulting in record attendance (see Vienna M before the ECG Conference)
  - Communications on ECG's relevant publications and press releases



- We are building strong Media Relations
- Press Releases & distribution method
- Resulting in a record of ECG in the News





# Events



TRUCK



SHIP



COMPOUND



RAIL



BARGE





# ECG Conference 2022

- Record attendance
- High-level speakers
- Amazing networking opportunities
- kaizen

TRUCK



SHIP



COMPOUND



RAIL



BARGE





# General Assembly & Spring Congress 2023

- Record attendance
- Updates on ECG's activities & high-level speakers

TRUCK



SHIP



COMPOUND



RAIL



BARGE





# Closing remarks

Wolfgang Göbel



A scenic view of Lago Maggiore from a balcony with stone columns, overlooking a town and mountains. The balcony has a low stone wall and several columns. The town below is densely packed with buildings, and the lake is a deep blue. In the background, there are large, green mountains under a blue sky with white clouds.

**See you at Lago Maggiore for the  
next General Assembly!**

**23-24 May 2024**



# General Assembly & Spring Congress

11-12 May  
Thessaloniki, Greece

With thanks to our Silver Sponsors

 **INFORM**

 **ProACT**  
GLOBAL SOLUTIONS

  
**Transporting Wheels**  
Your shipment, our commitment