

Survey of Vehicle Logistics in Europe

Edition 2022-23



Introduction

- ECG Survey of Vehicle Logistics in Europe (the so-called “Biennial Survey”) is prepared every two years
- This is the only publication for the European Vehicle Logistics sector, also covering Serbia, Norway, Turkey.

SURVEY OF VEHICLE LOGISTICS IN EUROPE

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2022/2023

ECG



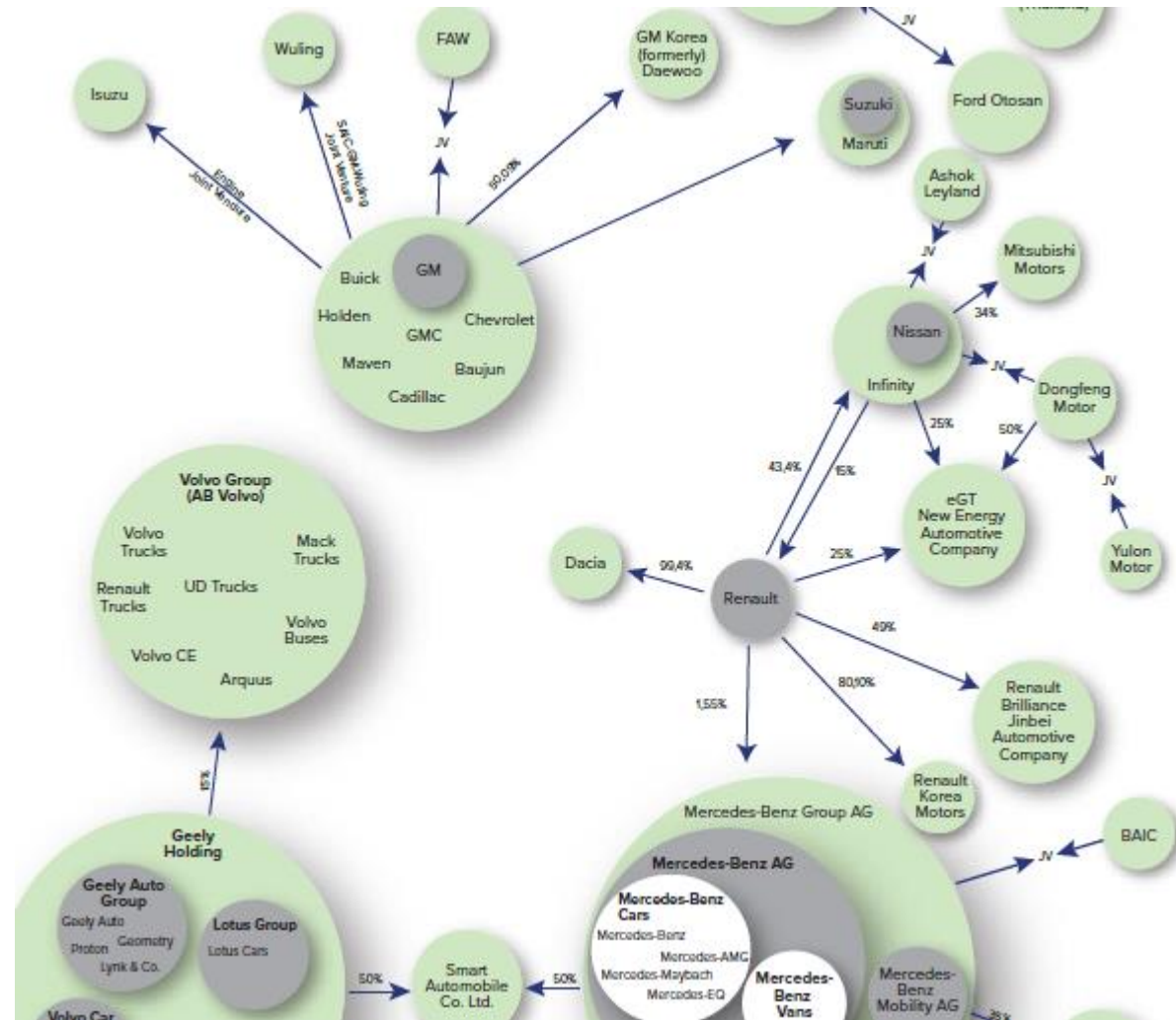
Sources

- The automotive industry economic outlook is provided by **LMC Automotive**
- Statistical data comes from **ACEA**
- The country-by-country analysis is performed by the **ECG Survey Working Group** which brings together logistics experts from member companies from all around Europe
- For the sales forecast for each country ECG has a long-standing co-operation with **S&P Global Mobility**
- **ECG members** provide data on their business and internal structure



Automotive Universe

- The Survey gives a detailed picture on the co-operation between car manufacturers and their different brands



OEM profiles

- The ECG Survey gives an overview of the top car manufacturer groups in Europe.
- Each company has a one - page introduction with a description of the company's logistics strategy

VOLKSWAGEN GROUP

Headquarters
Wolfsburg (DE)
2021 Turnover
EUR 250.2 bn sales revenue
2021 Operating result
EUR 15.4 bn
(operating profit after special items)
Vehicles produced in 2021
8,283,000
Brands
Volkswagen Passenger Cars,
Volkswagen Commercial Vehicles,
ŠKODA, SEAT, CUPRA, Audi,
Lamborghini, Bentley, Ducati, Porsche,
Scania, MAN.
Car production plants in Europe
63 Car production plants in Europe
Employees
672,800
Website
www.volkswagenag.com



'MOBILITY FOR GENERATIONS TO COME.'

VOLKSWAGEN

AKTIENGESELLSCHAFT

BACKGROUND

The Volkswagen Group, with its headquarters in Wolfsburg (Germany), is one of the world's leading automobile manufacturers and the largest carmaker in Europe. In difficult market conditions, the Group delivered 8.88 m vehicles to customers in 2021 (2020: 9.30 m). The global passenger car market share was 11.7% (2020: 12.9%). Group sales revenue in 2021 totaled EUR 250.2 bn (2020: EUR 222.8 bn), while earnings after tax amounted to EUR 15.4 bn (2020: EUR 8.8 bn). The Volkswagen Group includes nine car brands plus Ducati, Scania and MAN: Volkswagen Passenger Cars, Volkswagen Commercial Vehicles, ŠKODA, SEAT, CUPRA, Audi, Bentley, Lamborghini and Porsche. Each brand has its own character and operates as an independent entity on the market. The product spectrum ranges from motorcycles to small cars and luxury vehicles.

The commercial vehicles business area primarily comprises the development, production and sale of light commercial vehicles, trucks and buses from the Volkswagen Commercial Vehicles, Scania and MAN brands, the corresponding genuine parts business and services. The collaboration between the MAN and Scania commercial vehicle brands is coordinated within the TRATON GROUP. The commercial vehicles portfolio ranges from pickups to heavy trucks and buses. The power engineering business area combines the largebore diesel engines, turbomachinery, special gear units, propulsion components and testing systems businesses. In addition, the Volkswagen Group offers a wide range of financial services and fleet management. The Group operates 120 production plants worldwide. 672,800 employees worldwide produce vehicles and work in vehicle-related services or other fields of business. The Volkswagen Group sells its vehicles in more than 150 countries.

PRODUCTION AND LOGISTICS STRATEGY

Within the new Production Strategy 2030, Production and Logistics across the group continues to move together toward the future and is systematically aligned with the new Group Strategy NEW AUTO. In production and logistics, it is entitled "one.PRODUCTION". Because the cars of tomorrow also need the factories of tomorrow.

The focus is on the strategic target areas of efficiency, digitalization, environmental protection, production network and teamwork. They are the foundation of "one.PRODUCTION" and are managed by cross-functional teams in close coordination with the production boards of the brands and the region China of the Volkswagen Group. This further increases the pace and sharpens the focus.

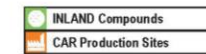
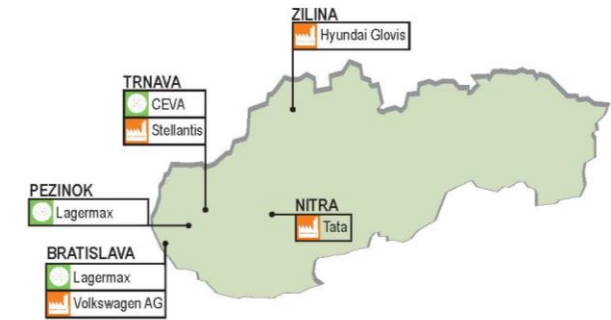
The aim of the new Production Strategy 2030 is to further increase the competitiveness of production and logistics across the Volkswagen Group. And in fact: climate-neutral, digital and profitable.

FUTURE DEVELOPMENT AND VISION

With the strategy NEW AUTO, the Group is focussing on the development and scaling of cross-brand technology platforms. For example, the production platform "Scalable Systems Platform" (SSP): It will premiere in 2026 and will gradually be used throughout the product range. In addition, there is the uniform software for all brands from the software subsidiary CARIAD. At the same time, the brands in the groups have more freedom of implementation. For the entire group, this organization means in the long term: more agility, higher efficiency, and lower costs.

Country-by-country analysis

- The Survey provides information on production sites and logistics compounds in each country together with the sales and production forecast of cars and LCV.
- The data on production sites is gathered by the ECG Working Group and the forecast data comes from S&P Global Mobility.



INLAND COMPOUNDS							
Operator	City	Rail connection	Compound area (m²)	Storage area (m²)	Max Storage Capacity (units)	Workshop (m²)	Services provided ⁽¹⁶⁾
CEVA LOGISTICS	TRNAVA	YES	60,000	n/d	10,240	1,500	1, 2, 3, 4, 5
LAGERMAX	BRATISLAVA	YES	220,000	220,000	7,000	3,200	1, 2, 3, 4, 5
	PEZINOK	YES	n/d	60,000	2,500	500	1, 2, 3, 4, 5

⁽¹⁶⁾ 1 = Storage 2 = Pre-Delivery-Inspection (PDI) 3 = Mechanical/Technical Services 4 = Refurbishment 5 = Paint

CAR PRODUCTION SITES			
Group	Site	Brand	Model
HYUNDAI GLOVIS	ZILINA	Kia	Ceed, Sportage, Venga
STELLANTIS	TRNAVA	Peugeot, Citroën	Peugeot 208, e-208, Citroën C3
TATA	NITRA	JLR	Discovery, Defender
VOLKSWAGEN AG	BRATISLAVA	VW, Audi, Škoda, Porsche	VW Touareg, upi, Audi Q7, Q8, Porsche Cayenne, Škoda Karoq

ECG MEMBERS PROVIDING SERVICES IN SLOVAKIA		
Adampol S.A.	GLOVIS Europe GmbH	RPM Europe B.V.
Autotrade & Logistics S.p.A.	Groupe CAT	Sesé Autologistics S.L.U.
Autoverslas JSC	GTT Automotive	Setram, S.A.
AvtoTransporti Kastelec	Hegelmann Transporte UAB	SPED S Ltd
Bleiras Logistics	Hödlmayr International AG	Stena Line Scandinavia AB
CAT Mosolf Polska Sp z o.o	Kapi Logistics Sp z o.o	Stobart Automotive Europe
CEVA Logistics	Kurbads Transport and Logistics	Tradisa Operator Logistico. S.L.
DB Cargo Logistics GmbH	Lagermax Autologistik International GmbH	Transfesa Logistics S.A.
DEAN International	Manvesta	United Transline
Dolvera	Milšped AML D.O.O	Vailida UAB
EURASIA Logistics Ltd.	Motor Vehicle Transportation MVT Ltd	Vega International Car-Transport & Logistic-Trading GmbH
Focus Logistics JSC	Neptune Lines Shipping and Managing Enterprises S.A.	Vitaiima UAB
GCA Logistique Automobile	Network4Cars	Voitura UAB
Global Motion Sp z o.o	Palentina de Transportes y Logistica S.L.	Wallenius Wilhelmsen Solutions

Forecasts for each country



LATVIA

SALES FORECAST PASSENGER CARS

Group	Brand	CY 2020	CY 2021	CY 2022	CY 2023	CY 2024	CY 2025
TATA	JAGUAR	51	40	44	55	46	35
	LAND ROVER	218	103	178	228	209	188
TESLA	TESLA	6	7	43	68	64	55
TOYOTA	LEXUS	201	217	247	296	355	348
	TOYOTA	1,937	2,319	2,226	2,408	2,440	2,352
VOLKSWAGEN	AUDI	262	293	330	353	417	476
	BENTLEY	71	53	21	3	2	1
	CUPRA	0	87	269	214	227	287
	LAMBORGHINI	1	1	2	2	2	1
	PORSCHE	136	172	190	165	145	145
	SEAT	136	247	138	170	162	129
	ŠKODA	1,939	1,886	1,596	1,662	1,673	1,652
	VOLKSWAGEN	1,555	1,506	1,297	1,258	1,357	1,503
OTHERS	OTHERS	0	1	1	0	0	0



FRANCE

PRODUCTION FORECAST LIGHT COMMERCIAL VEHICLES AND COMMERCIAL VEHICLES UP TO 3,5T

Group	Brand	CY 2020	CY 2021	CY 2022	CY 2023	CY 2024	CY 2025
INEOS	INEOS	0	0	0	1,054	1,512	4,465
MERCEDES-BENZ	MERCEDES-BENZ	11,515	13,716	26,150	29,993	29,770	29,144
RENAULT-NISSAN-MITSUBISHI	NISSAN	12,901	18,756	30,615	38,388	39,782	38,567
	RENAULT	273,013	277,658	262,219	300,680	322,814	300,837
STELLANTIS	CITROEN	23,518	29,569	17,843	31,233	35,522	35,402
	FIAT	17,664	15,001	20,632	24,988	23,090	24,237
	OPEL	44,243	58,159	27,599	35,161	33,749	33,221
	PEUGEOT	36,308	44,586	21,464	39,269	46,179	42,505
TOYOTA	TOYOTA	24,811	32,484	31,168	28,381	27,884	27,574



SLOVAKIA

OUTWARD FLOW FORECAST PASSENGER CARS

Sales Region	Sales Country	CY 2020	CY 2021	CY 2022	CY 2023	CY 2024	CY 2025
EUROPE	AUSTRIA	8,170	7,667	9,081	8,839	16,583	19,013
	BELARUS	379	303	113	97	154	270
	BELGIUM	18,947	16,222	18,147	15,318	25,772	28,478
	BOSNIA-HERZEGOVINA	530	674	663	495	521	704
	BULGARIA	2,124	2,689	3,022	2,561	3,035	3,385
	CROATIA	2,100	2,856	2,930	2,660	4,675	4,925
	CZECH REPUBLIC	9,839	10,402	12,237	11,006	16,890	21,049
	DENMARK	16,407	12,842	13,170	10,800	12,808	13,328
	ESTONIA	1,389	1,351	1,452	1,318	1,938	2,122
	FINLAND	5,043	5,113	5,005	4,419	6,675	7,422
	FRANCE	162,615	156,705	159,733	124,589	115,925	135,241
	GERMANY	103,078	117,894	108,528	106,676	168,214	158,769
	GREECE	5,452	6,634	7,214	5,660	6,215	6,806
	HUNGARY	6,739	8,484	7,349	6,476	8,943	9,192
	ICELAND	562	960	771	578	606	750
	IRELAND	4,287	4,895	5,175	4,211	5,414	6,985
	ITALY	74,818	70,023	59,979	58,898	55,417	67,984
	KAZAKHSTAN	179	220	194	180	365	828
	LATVIA	908	932	991	937	1,392	1,614
	LITHUANIA	1,467	1,926	2,595	2,247	3,358	4,166
	LUXEMBOURG	1,979	2,071	2,149	1,537	2,026	2,209
	MACEDONIA	560	605	452	443	643	851
	NETHERLANDS	18,690	15,487	15,568	11,967	12,528	17,338
	NORWAY	6,522	3,204	1,217	913	1,833	2,186
	POLAND	23,398	30,236	29,166	29,046	37,490	41,179
	PORTUGAL	7,951	7,756	8,548	7,112	9,288	9,759
	ROMANIA	4,601	5,008	5,038	5,140	11,415	12,046
	RUSSIA	13,088	11,722	8,037	4,345	4,286	4,796
	SERBIA	1,448	1,934	1,616	1,478	2,588	3,145
	SLOVAKIA	7,880	7,598	8,353	8,350	11,597	12,143
	SLOVENIA	3,174	3,379	4,481	3,867	4,988	5,318
	SPAIN	51,603	53,006	62,771	55,652	66,690	80,407
	SWEDEN	11,283	13,548	11,630	8,974	10,673	14,194
	SWITZERLAND	7,163	8,107	7,829	7,135	11,429	11,677
	TURKEY	16,156	15,105	13,375	11,665	23,194	28,862
	UKRAINE	8,893	9,729	2,395	1,952	1,887	1,758
	UNITED KINGDOM	75,787	81,311	97,750	91,941	111,630	114,284
GREATER CHINA	HONG KONG	315	321	346	343	339	722
	MAINLAND CHINA	76,234	79,763	95,894	97,712	95,409	94,966
	TAIWAN	1,899	2,383	3,749	2,825	2,786	3,204
JAPAN/KOREA	JAPAN	7,776	6,128	7,438	8,062	7,439	8,857
	SOUTH KOREA	7,585	7,777	7,569	6,805	6,100	6,431
MIDDLE EAST/AFRICA	ALGERIA	84	313	1,163	1,552	1,337	2,075
	BAHRAIN	118	58	91	69	68	175
	EGYPT	8,906	14,190	12,106	12,986	13,564	13,891
	ISRAEL	3,133	3,666	3,874	3,733	5,787	9,791
	KUWAIT	733	1,012	1,017	930	1,007	1,204
	MOROCCO	5,011	6,317	5,409	5,354	7,664	8,508
	OMAN	266	275	244	185	165	200
	QATAR	576	791	434	327	319	446
	SAUDI ARABIA	1,378	1,294	1,172	1,010	973	1,129
	SOUTH AFRICA	2,587	2,608	2,806	2,291	2,284	2,845
	UNITED ARAB EMIRATES	1,503	1,826	2,391	2,558	2,693	2,845

Member pages

- Each ECG member has a page where the main company data are published, containing subsidiaries, financial figures and assets, as well as the list of the top management



Groupe CAT has been one of the European independent leaders in the field of automotive transport and logistics for 65 years.

Its core mission: building a healthy and sustainable growth for everyone.

Its strengths: a workforce of more than 7,600 talents whereof around 2,000 drivers - a fleet of 1,350 trucks and 2,000 wagons - a dense network of 185 sites in 20 countries worldwide.

Two divisions dealing with physical and administrative management: Vehicle Logistics, for new, used, private, commercial and agricultural vehicle flows - Cargo Logistics for automotive parts, components, accessories, motorbikes, paper, glass, tires.

Its expertise since 1957 within the automotive industry made it possible to develop high-quality logistics, transport and preparation solutions inspiring confidence in customers helping build and maintain trust.

CORPORATE STRUCTURE AND RELATIONSHIPS

Main Groupe CAT subsidiaries are: CAT France, CAT LC France, CAT LC Spain, CAT LC Polska, CAT Germany, CAT UK, CAT Spain, Autotrans, CAT Autologistics Romania, CAT MOSOLF Polska, TransCAT Auvergne, CVT, Sintax Logistica SA, STVA, TransCAT Adriatic, TransCAT International, ULTT + every country's subsidiary called CAT.

OFFICES OR FORMAL REPRESENTATION

Argentina	France	Netherlands	Slovenia
Azerbaijan	Germany	Poland	Spain
Belgium	Italy	Portugal	Turkey
Bulgaria	Lithuania	Romania	Ukraine
Croatia	Morocco	Russia	United Kingdom

SERVICES PROVIDED (COUNTRIES)

Austria	Germany	Luxembourg	Serbia
Belgium	Greece	Middle East	Slovakia
Bulgaria	Hungary	Netherlands	Slovenia
Croatia	Italy	Poland	Spain
Czech Republic	Latin America	Portugal	Turkey
Estonia	Latvia	Romania	Ukraine
France	Lithuania	Russia	United Kingdom

CORPORATE STATISTICS 2021

Employees	6,100*
Trucks operated	1,350
Trucks full-time subcontracted	1,480
Wagons operated	2,000
Total vehicles handled	5,400,000
Inland compounds	54
Port compounds/ Port terminals	12
Total storage area (m²)	9,800,000
Total workshop area (m²)	195,000

*Employed in FVL

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Philippe Gaultier

CAT Solutions Director
Valérie Sarrieu

Commercial Director
Edoardo Cumino

Legal Director
Nathalie Huet



Advertisement

- There is also a possibility to publish an advertisement in the ECG Survey for members and all other companies wishing to benefit from the visibility this publication offers in the sector.
- ECG members benefit from a preferential rate for their advertisement

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