Eastern Regional Meeting

Budapest, 12 September 2024



Welcome and Opening by Chairman

Krzysztof Szeligowski, Adampol





Market update

- Update on the regional market situation
- Discussion about the regional market situation

15:40 Presentation on eCMR, Marcin Koziak, Prilo

ECG General Update

- Weights and Dimensions
- VDI guidelines
- Eurovignette
- Invoicing
- Other Working Group activities

AOB and next meeting(s)

End of meeting

Agenda





ECG

After the meeting

18:45 Meet at the hotel lobby and leave for the dinner

19:00 Networking dinner at the VakVarjú resturant



The networking dinner is kindly sponsored by

HÖDLMAYR International

Market update

Krzysztof Szeligowski





Global Light Vehicle Sales Update, July 2024 (Source: GlobalData)

	Sales (units)					Selling rate (Units/year)				
	Jul	Jul	Percent	Year to date	Year to date	Percent	Jul	Year to date	Year	Percent
	2024	2023	change	2024	2023	change	2024	2024	2023	change
WORLD	7,047,583	7,106,372	-0.8%	49,440,147	48,509,863	1.9%	90,607,976	86,322,767	86,729,159	-0.5%
USA	1,285,096	1,305,247	-1.5%	9,135,959	8,971,076	1.8%	15,965,854	15,620,966	15,552,300	0.4%
CANADA	156,718	145,713	7.6%	1,058,228	982,942	7.7%	1,824,963	1,784,642	1,691,271	5.5%
WESTERN EUROPE	1,054,874	1,055,894	-0.1%	8,160,970	7,827,585	4.3%	12,924,348	13,412,464	13,265,481	1.1%
EASTERN EUROPE	394,076	349,017	12.9%	2,619,143	2,161,581	21.2%	4,449,753	4,825,495	4,029,704	19.7%
JAPAN	401,326	376,036	6.7%	2,509,518	2,807,010	-10.6%	4,701,494	4,225,442	4,744,288	-10.9%
KOREA	130,158	133,904	-2.8%	915,364	1,015,214	-9.8%	1,476,678	1,572,234	1,712,593	-8.2%
CHINA	1,829,927	2,012,011	-9.0%	12,974,602	13,061,430	-0.7%	27,731,099	23,996,936	25,230,209	-4.9%
BRAZIL / ARGENTINA	267,381	257,375	3.9%	1,518,473	1,412,928	7.5%	2,972,105	2,652,868	2,602,272	1.9%
OTHER	1,528,027	1,471,175	3.9%	10,547,890	10,270,096	2.7%	18,561,682	18,231,718	17,901,042	1.8%
Notes:	The percentage change in the final column compares the average selling rate in the year-to-date with the last full year.									
	Late reporting countries and estimates are included in "Other".									
	Eastern Europe includes Turkey.									
	China includes estimate of light vehicle imports.									

https://www.just-auto.com/industry-data/in-data-global-light-vehicle-sales-deliver-another-best-result-of-the-year-so-far-in-july/



Eastern EU markets NEW PASSENGER CAR REGISTRATIONS BY MARKET January – July 2024

No	Country	Jan-Jul 2024	Jan-Jul 2023	% change Jan-Jul 24/23	
1	BULGARIA	26 945	20 983	28,41%	
2	CROATIA	45 210	39 865	13,41%	
3	CZECH REPUBLIC	136 671	131 636	3,82%	
4	ESTONIA	12 021	13 953	-13,85%	
5	HUNGARY	71 867	64 936	10,67%	
6	GREECE	90 225	82 741	9,05%	
7	LATVIA	10 119	11 994	-15,63%	
8	LITHUANIA	17 490	17 106	2,24%	
9	POLAND	320 099	275 062	16,37%	
10	ROMANIA	96 562	85 744	12,62%	
11	SLOVAKIA	53 864	53 458	0,76%	
12	SLOVENIA	32 866	31 086	5,73%	
12 EASTERN EU COUNTRIES		913 939	828 564	10,30%	
EURC	PEAN UNION	6 537 362	6 290 388	3,93%	

<u>Key remarks</u>

According to statistics from 12 Eastern EU countries, in the JAN - JUL.2024 the number of registrations increased by 10,30% compared to the same period of the previous year.

The highest percentage increase was recorded on the Bulgarian market (28,41%), the smallest on the Slovakia market (0,76%).

A decrease in new car registrations was recorded on the Latvian market (-15,63%).

The Polish market showed the largest number of registered new cars 320 099 units.

Eastern EU markets **NEW PASSENGER CAR REGISTRATIONS BY MARKET**

January – July 2024



Jan-Jul 2024 Jan-Jul 2023 F

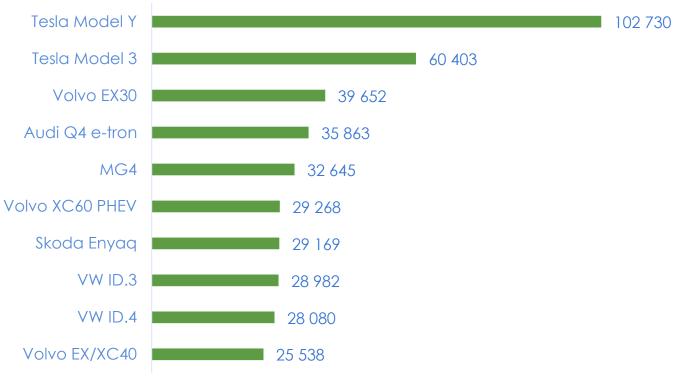
CG

EV Market BEV&PHEV&HEV Eastern Europe registrations January – July 2024

No	Country	Jan-Jul 2024	Jan-Jul 2023	% change Jan-Jul 24/23	
1	BULGARIA	1 855	1 565	19%	
2	CROATIA	11 592	9 964	16%	
3	CZECH REPUBLIC	36 934	28 644	29%	
4	ESTONIA	6 571	6 328	4%	
5	HUNGARY	41 106	31 873	29%	
6	GREECE	45 175	32 337	40%	
7	LATVIA	4 574	4 746	-4%	
8	LITHUANIA	9 702	8 162	19%	
9	POLAND	165 983	119 813	39%	
10	ROMANIA	41 101	32 222	28%	
11	SLOVAKIA	18 658	16 894	10%	
12	SLOVENIA	5 804	7 673	-24%	
12 EASTERN	EU COUNTRIES	389 055	300 221	30%	
EUROPEAN UNION		3 200 755	2 864 358	12%	

Top Selling Electric Vehicles in Europe BEV&PHEV

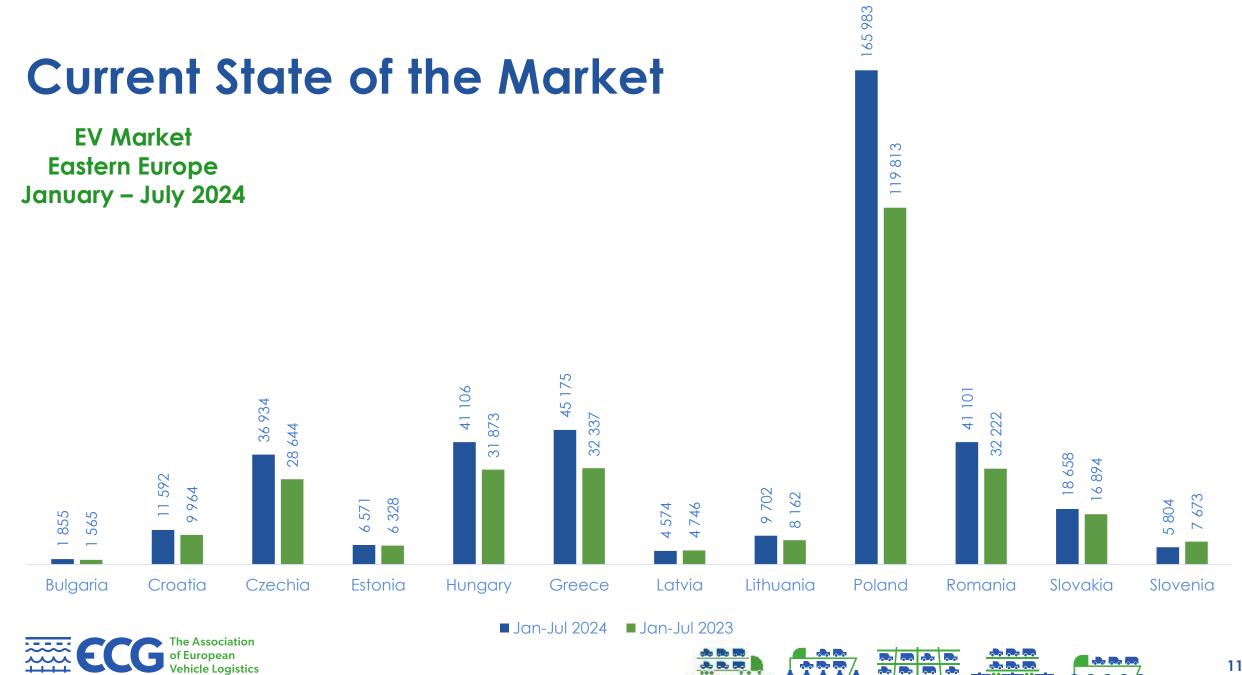
January - June 2024



Source: ACEA

https://cleantechnica.com/wp-content/uploads/2024/07/Europe-EV-Sales-in-January-June-2024.png





Vehicle Logistics



	No.	Country	Jan – Aug	Jan – Aug	% Change
	NO.	Cooniny	2024	2023	24/23
Eastern European markets (non-EU)		Russia	1 173 614	773 235	52%
January – August 2024	2	Turkey	605 639	587 919	3 %

Key remarks

Source: AEB AMC, UKRAUTOPROM, ODD

Ukraine

* lan- lul

39 7 4 6

32 369

22.79%

Russia: In January-August 2024, 1,173,614 new cars (under 3 years) were sold in Russia, which is 52% more than the same period last year (773,235 vehicles) (AEB AMC, PPC JSC, https://tass.com/economy/1837721)

Turkish market: Automobile sales increased by 3.0% in the January-August period of 2024 compared to the previous year, reaching 605,639 units, while the light commercial vehicle market decreased by 9.5%, reaching 156,513 units. (OTOMOTIV DISTRIBÜTÖRLERI DERNEĞİ)

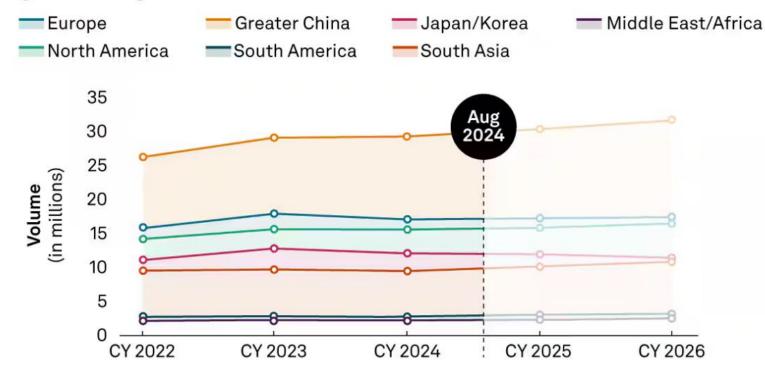
Ukraine*: In the January - July of 2024, 39 746 new passenger cars were registered in Ukraine, which is 22,79% more than in the January - July 2023 year, according to the Ukrainian Motor Vehicle Manufacturers Association (Ukrautoprom).





Light Vehicle Production Forecast August 2024 S&P Global Mobility

August 2024 Light Vehicle Production Forecast



Data compiled August 17, 2024 Source: S&P Global Mobility ©2024 S&P Global

Europe:

The outlook for Europe light vehicle production was increased by 60,000 units and by 31,000 units for 2024 and 2025, respectively. The outlook for Western and Central Europe, including Turkey, was revised down by 13,000 units. This was due to somewhat stagnated vehicle demand and supply chain issues. The broader European market continues to be influenced by elevated vehicle pricing, lingering high inflation and the ongoing shift in electrification.

https://www.spglobal.com/mobility/en/researchanalysis/light-vehicle-production-forecast-august-2024.html





Discussion about the regional market situation

Please tell us about the situation in your area/country

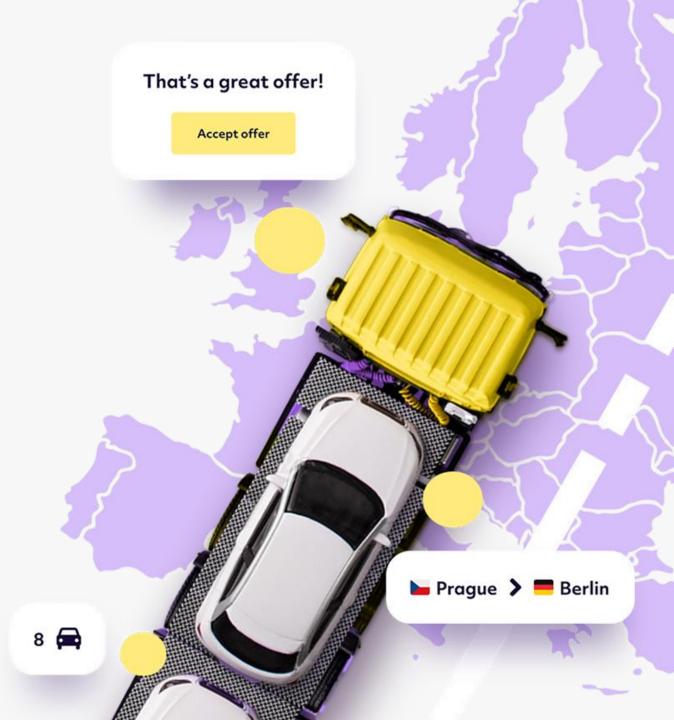


Introduction to eCMR



ilo Car Transport Exchange

Budapest – Marcin Koziak 12.09.2024

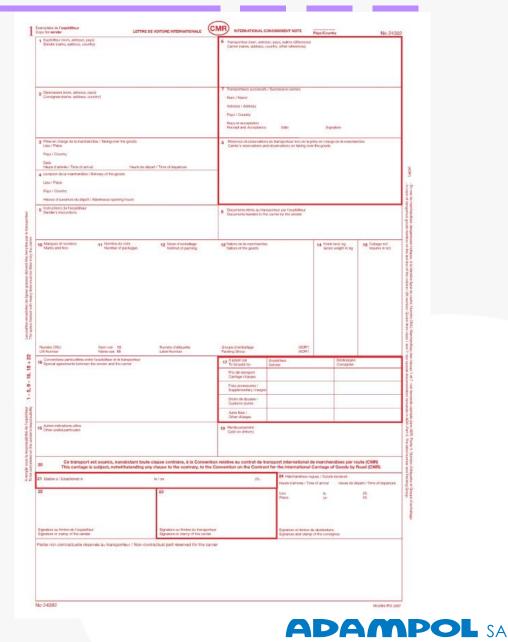


vehicle logistics

CMR

Convention on the Contract for the International Carriage of Goods by Road

Established in **1956** under the auspices of the United Nations Economic Commission for Europe (UNECE).





99% of freight operations in the UE still are using paper documents

380 millions of working hours per year are necessary to process and handle all

the transport information issued on paper



Additional Protocol to the CMR Convention, 2008

(allowing for the use of **electronic consignment** notes)

Regulation (EU) 2020/1056 on electronic freight transport information (EFTI)
Directive 2006/123/EC on services in the internal market
Directive 2010/40/EU on Intelligent Transport Systems (ITS)
Regulation (EU) No 910/2014 on electronic identification and trust services (eIDAS)

KEY FACT 26 out of 27 EU countries have ratified the eCMR protocol





SOUNDS SO SIMPLE, BUT ... ?

BLOG

Winning the paperless revolution

with Digital Transport Documents

eCMR: If not now, then when?

The e-CMR offers so many advantages, what is still holding you back?

The Paperless Revolution

17th July 2024

Gaining visibility into the subcontracting chain with eCMR

How eCMR is Transforming the Freight Industry

eCMR Guide For Shippers

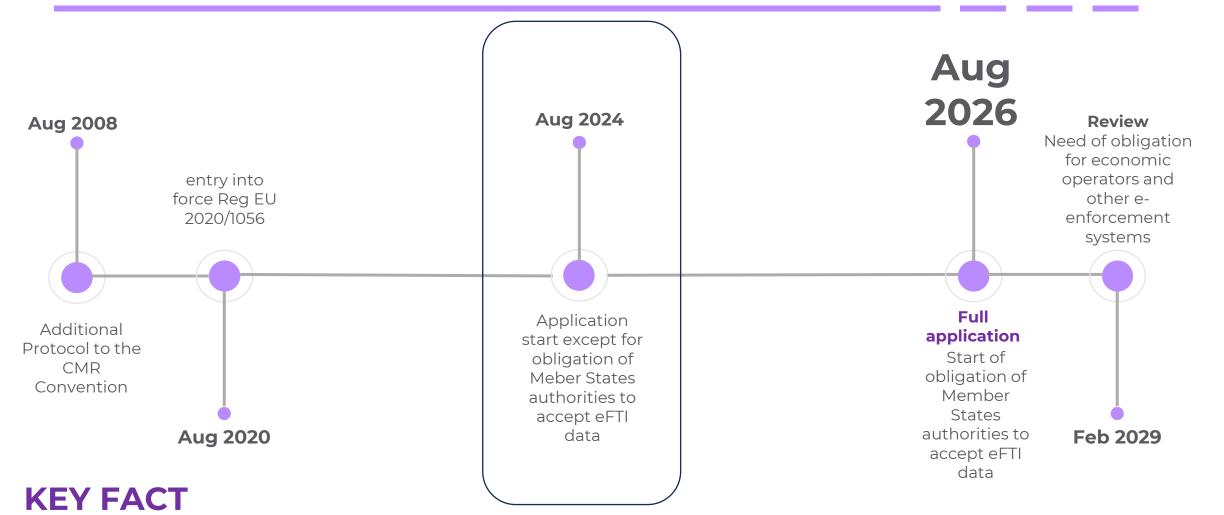
Why 2024 is the year to join the paperless revolution

Dive into the benefits of implementing eCMR early on and get answers to the most common questions about digital CMRs.





Prilo



The system begins, but authorities don't have to use it yet.

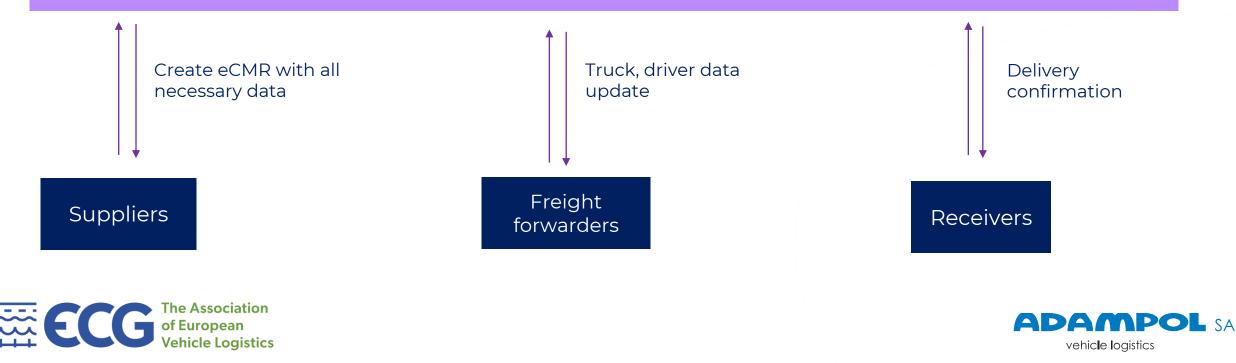




WHY IS IT SO IMPORTANT ? Public administration, Road inspections Bundesamt für Güterverkehr (BAG), other Solution Provider Platforms

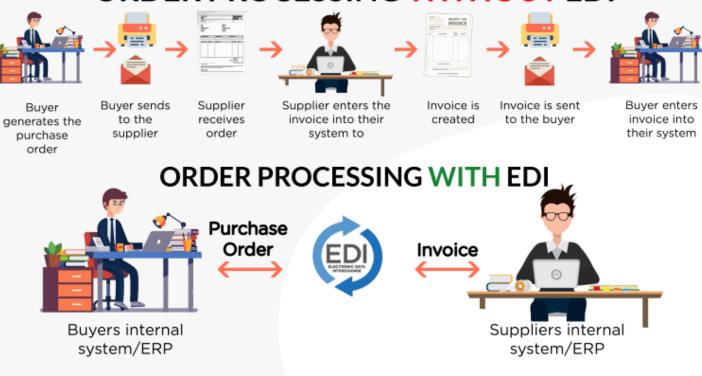
Api, EDI





- Investment in IT Infrastructure
- Employee Training
- Collaboration with Partners
- Data Security
- Testing and Optimization
- Change Management
- Regulatory Compliance
- Finding Solution Provider

ORDER PROCESSING WITHOUT EDI

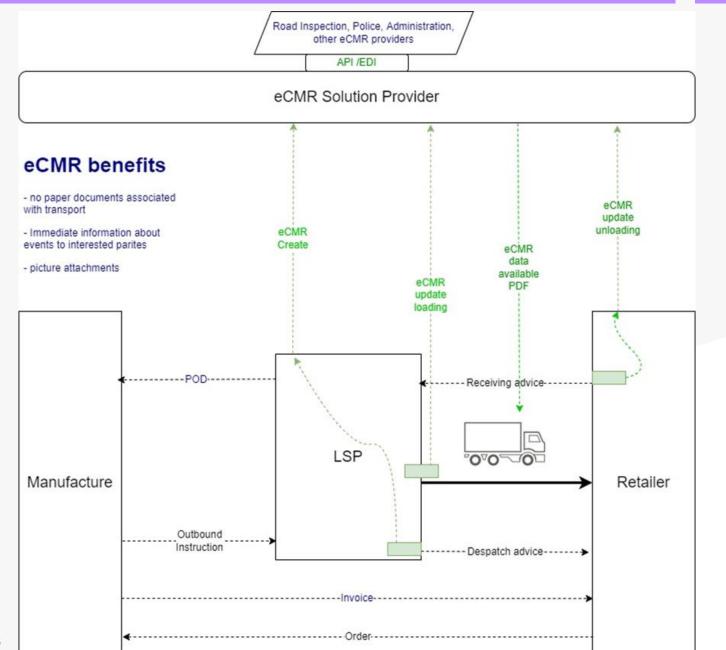






ADAMPOL SA

vehicle logistics



ECCG The Association of European Vehicle Logistics

Thank you.

Marcin Koziak









Update on ECG activities

Current topics
New initiatives
ECG general update



Current topics



VDI Guideline 2700

Lashing of vehicles on car transporters



Lashing of vehicles on car transporters

VDI's Guideline 2700 – in force since 1 September 2024

Part 8.1 'Securing of loads on road vehicles, securing of passenger cars and cargo minivans on vehicle transporters'

Part 8.2 'Securing of loads on road vehicles, securing of trucks on vehicle transporters' have been in review for the last years.

The rules are immediately enforced – no transition period possible by the VDI

Lashing of vehicles on car transporters

What are the main changes?

- Both new and existing trailers will need to be certified by the trailer manufacturers
- Lashing belts used will need to comply with the new Guideline
- Load securing based on the weight of the vehicles

Innovations in load securing on car transporters

according to VDI 2700 Part 8 and Sheet 8.1 as of 2024

Webinar





Tuesday, 24 September **Online** 09:00-10:30

VDI TÜV Süd Kässbohrer Lohr, RIMO, Rolfo



Weights and Dimensions



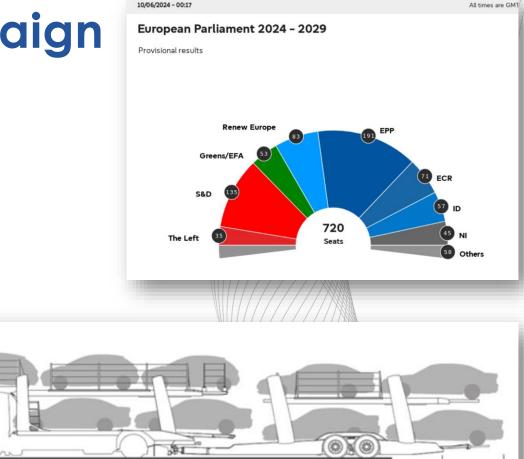
Long standing lobbying campaign

Different national legislations on loaded length for vehicle transporters

ECG advocacy campaign to restart when the new Commission is formed

At Council level (Members States) there is still no common position – highly political file





18.75m

20.75m

Eurovignette

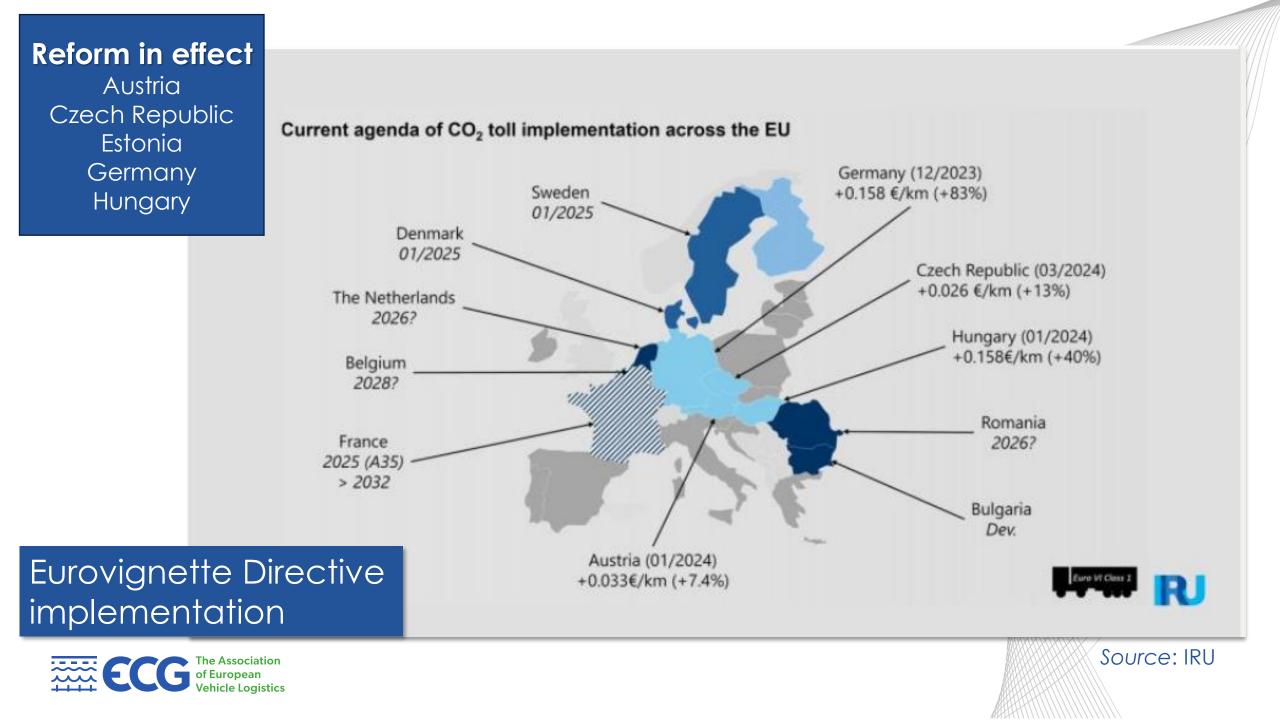


Eurovignette Directive



- 25 March 2024 Member States to implement the requirements of the Directive namely additional CO₂ surcharge in road tolls
- By 2026, distance and time-based tolls varied by CO2 are expected to be in force in 17 Member States. This means that truck activity on 63% of EU territory will have a strong incentive to switch to zero-emission vehicles

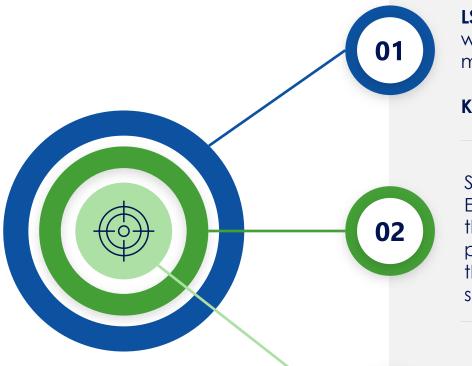




New initiative



Invoicing initiative



03

side' too

LSP task force to be convened to work on a questionnaire for the ECG membership

Kick-off \rightarrow 19 September

Send out the **questionnaire** to all ECG main delegates and analyse the results to know the causes of the payment delays. Possibly quantify the problem. What can be a solution?

Once our understanding of the LSP issues is sufficient, **involve the OEMs**

too to have the views of the 'other



Purpose is to **understand the challenges** and to **draft the questionnaire** along these lines



Purpose is to **finetune the analysis** of the problems encountered, quantify their impact and understand their root causes



Deep dive with several OEMs in interviews to have their views too. Then present the first findings at the Industry Meeting in October



40

Lack of skilled labour

?

Survey conducted among ECG members on skills and competencies in the FVL industry focusing on main gaps and areas where shortage of personnel exists

ECG focus to extend its qualification opportunities









Negotiation management

- It is delivered by Negotiation Academy Potsdam, part of the University of Potsdam (in person)
- High-standard intensive 2-day
 programme
- Registrations will open soon

Module 1 21-22 January 2025

	U	

Negotiation A cademy P otsdam

Module 2 4-5 March 2025

Module 3 'Big Mountain' 12-13 November 2025



Working group updates



Emissions standardisation

Training: Sustainability and carbon emissions accounting for vehicle logistics

Tuesday, 19 November 12:00-18:00 Wednesday, 20 November 09:00-13:00 Brussels, Belgium

Training on implementation of the ECG-VDA guidelines

VDA Vertand or

Emissions calcula reporting guideline automotive supply

Who? Every service provider interested in using the guideline

Free of charge for all ECG members



A joint Odette/ECG Publication



ECG The

VIN Labels in the Vehicle Distribution Process

Recommendation





Revision of the ECG-Odette VIN label standard is now available

Recommendation on the information shared on transported vehicles

August 2024

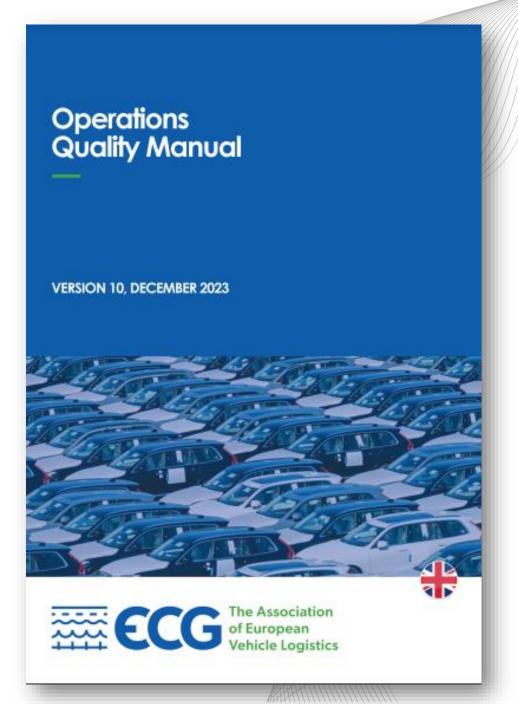


A list of information to be shared with the LSPs for essential for the efficient handling and stowing of the vehicles. ciation ean ogistics

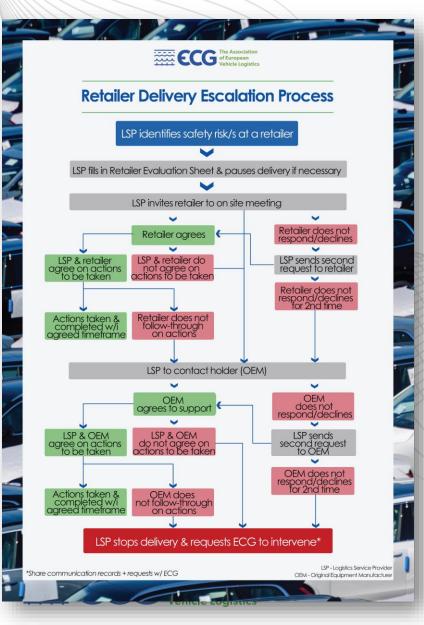
Quality

- Provides a minimum industry standard for vehicle handling
- OQM for Cars and LCVs was last updated in December 2023
- Chapter on the transport of cars in containers added
- Translated to 10 languages





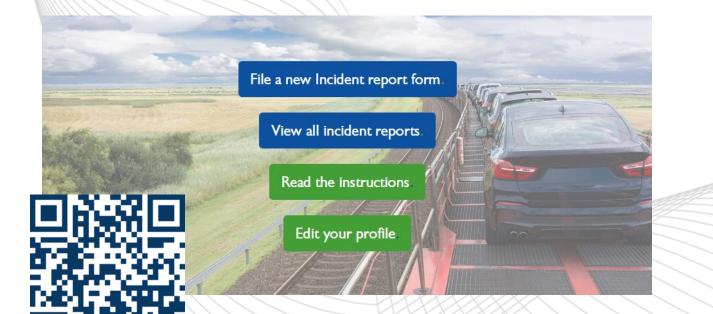
Health & Safety



Work of the subgroup Delivery at retailers restarted

Next step: Discussion at the Industry meeting in October

Health & Safety



Report on your 2024 severe incidents and near misses



Making the industry safer -Reducing accidents in FVL

2023 incidents & analysis

APRIL 2024





Health & Safety

In 14 languages! Măsuri de securitate la încărcare **ECG Guidelines** 1. Fixati vehiculul cu chingi pentru a preveni căderile de la înălțime **ECG Guidelines** on Safe Yard Design \odot Safe loading process Step 2A - Prepare Truck Upper Deck onfirmare vizuală a prezen siguranta, nedeteriora A. Put on gloves B. Visually confirm that there are no people on or around the truck **DRAFT 1, MAY 2020** VERSION 1, MAY 2020 To prevent hand injuries To prevent injuries to other people in the loading area 4 основни правила А. Отворете вратата като използвате 3 опорни Б. Седнете на шофьорското място с двата крака точки (Едната ръка на врата, другата на навън и колена, сочеши към вратата ВЛИЗАНЕ В АВТОМОБИЛА тавана, стъпил на безопасно място) <u>...</u> За да влезнете безпроблемно и да не За да предотвратите наранявания повредите вратата когато влизате в автомобила



ECCG The Association of European Vehicle Logistics

FVL Legal network

- Meetings: 4 times a year online
- Objective: forum where legal experts in FVL can network and exchange ideas on legislation that affects our sector
- Next meeting: 25 September, online
- Are your colleagues already part of the network?

Our publications



Our latest Business Intelligence report





With special thanks to ECG data provider <u>S&P Global Mobility</u>

ECG members can access further data on the ECG Survey website



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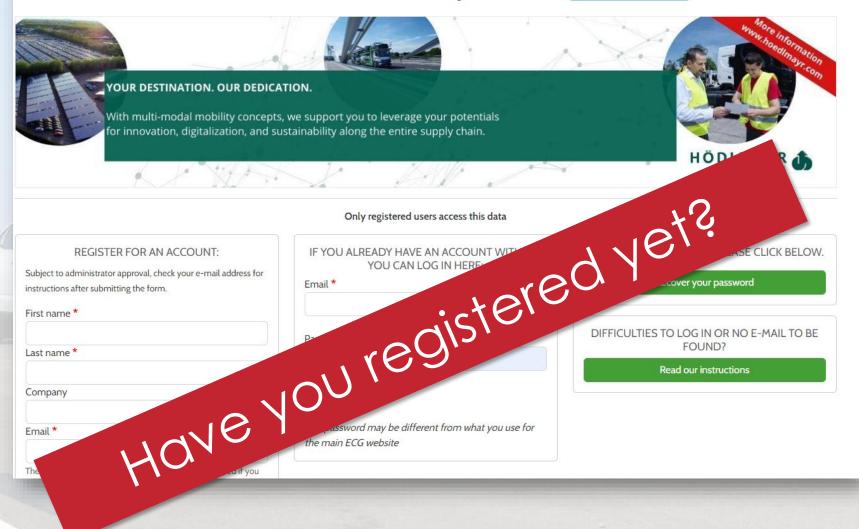




ECG Survey Website



Welcome to the ECG Survey website What is the ECG Survey?



Our events







Powering the future: ECG Conference 2024 Collaboration moves us forward

🕯 24 - 25 October 🔹 Hamburg, Germany



Save the date



Our future events

Event	Date	Place
VDI Guideline 2700 - Webinar	24 September 2024	Online
Maritime & Ports meeting	26-27 September 2024	Rostock, Germany
Women in FVL	24 October 2024	Hamburg, Germany
ECG Conference	24-25 October 2024	Hamburg, Germany
Alumni meeting	20-21 February 2025	Barcelona, Spain
General Assembly & Spring Congress	22-23 May 2025	Cascais, Portugal



Any other remarks?



Next meetings



Our meetings 2019-2024

Place	Date	Guests	Sponsors	Place	Date	Guests	Sponsors
Kaunas, LT	25/04/19	58	Rimo	Budapest, HU	12/09/2024	54	HÖDLMAYR
Vienna, AT	19/09/19	42	Kässbohrer Driven by professionals®				
Online	17/09/20 22/04/21	36 41	No sponsor				
Katowice, PL	23/09/21	39	cmpl				
Bratislava, SK	28/04/22	34	No Sponsor				
Bucharest, RO	8/09/22	30					
Gdańsk, PL	27/04/23	64	Car Transport Exchange				
Riga, LT	14/09/23	70	VEHICLE TRANSPORTATION AND LOGISTICS Kässbohrer Driven by professionals*				
Istanbul, TK	25/04/24	71					

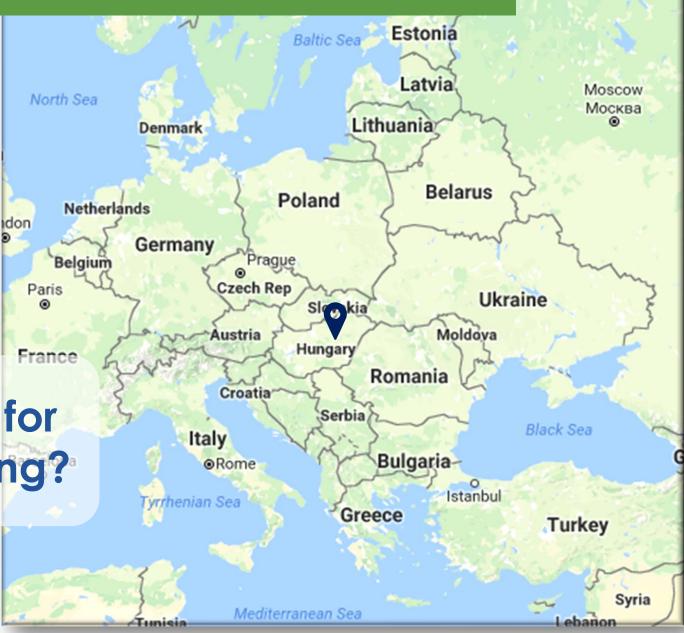
Next meetings

Save the date 10 April 2025 Kaunas, LT

G

Where should we go for our September meeting?

ROUP



End of the meeting

Thank you for attending

