



51% of FVL companies are experiencing a drop in volume.

According to the latest results of the cost and confidence trends survey from ECG – the Association of European Vehicle Logistics, the number has skyrocketed in two years.

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"Volumes are going down and uncertainty in the market is increasing for companies", says Wolfgang Göbel, President of ECG, continuing, "We urgently need to rebuild trust in the sector, especially while attention remains on geopolitical tensions and trade conflicts."

According to the latest survey results, the number of companies experiencing a decrease in volume soared to 51% in Q1 2025 from all-time lowest 5% in Q2 2023 during the most challenging time of the capacity crisis. Companies don't seem to expect any significant changes in the next 6 months for their business.

The current trade conflicts, with an associated potential rise of inflation, and the growing unpredictability of political developments, increase the uncertainty on the market.

The willingness to invest in all types of assets (ships, wagons and trucks) in the next 6 months has dropped from 91% last autumn to 75% in the past 3 quarters, mainly due to the lack of confidence in future volumes.

That sums up the shockingly high level of business pessimism, from 3% two years ago (Q1 2023) to 36% in 2025.

Car makers are under severe financial pressure. Some relief is expected as the European Union has granted some flexibility for them to reach the, previously very ambitious, car and van CO₂ emission reduction targets within the next three years.

The European Commission has responded with several policy packages also for businesses – including the Competitive Compass, the New Industrial Clean Deal, and the Omnibus Simplification Package. *“The business optimism is at a record low among our members. These frameworks will only work if industry leaders trust them and feel they offer real support”*, adds Göbel.

At the upcoming ECG General Assembly & Spring Congress, taking place on 22–23 May in Cascais, Portugal, the Finished Vehicle Logistics (FVL) industry will turn its focus to driving process efficiencies amid ongoing challenges. A key topic on the agenda is the role of Artificial Intelligence in enhancing the stability, resilience, and cost-effectiveness of the FVL ecosystem. At the same time, the sector continues its transformation towards decarbonisation, with particular attention on how a Green Cost Calculator could provide greater transparency around investment decisions and carbon emissions savings.

Note to editors:

ECG is the established European platform for the outbound automotive logistics sector bringing together logistics service providers, manufacturer logistics managers and suppliers to the sector. ECG aims to facilitate non-commercial collaboration between member companies and assist them in sharing best practices in many operational areas, especially the harmonisation of operational standards.

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About ECG

ECG, 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 more than 200 member companies and partners, from family-owned SMEs to multi-nationals, and is the major champion of the European vehicle logistics sector.

ECG represents all transport models at EU level- road, rail, maritime and fluvial. ECG members provide transport, distribution, storage, preparation, and post-production services to manufacturers, importers, car rental companies, and vehicle leasing operators in the 27 Member States of the European Union as well as Norway, Switzerland, Turkey, the United Kingdom, and beyond. They own or operate more than 470 car-carrying ships, 14,000 purpose-built railway wagons, 23 river barges, and 26,000 road transporters. As a major employer, the finished vehicle logistics sector plays an important role in contributing to the economic success of the European Union. Today, ECG members have an aggregate turnover of €21.3bn and their economic impact on companies associated with the sector is estimated at €56bn. **More than 210,000 Europeans are employed directly by our members.**

