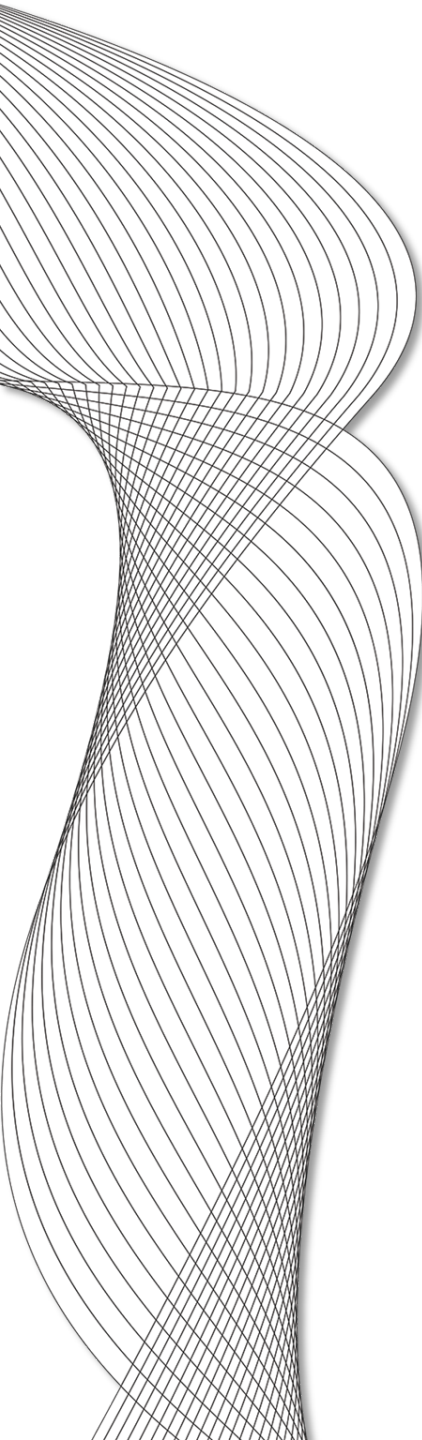




Welcome

Wolfgang Göbel

ECG President



Changing Technology in a Changing World:
The Power of Efficiency Through Innovation in FVL

16-17 October
Amsterdam, Netherlands



ECG

The Association
of European
Vehicle Logistics

Market developments

Deutsche Autoindustrie

Back to Autoland

Die deutschen Autobauer müssen ihr Geschäftsmodell neu erfinden. Hohe Kosten, schwache Nachfrage, starker Wettbewerb – die Liste ist lang. Bleibt die Branche stehen, droht der Abstieg vom Autoland zur Industrieprovinz. Doch es braucht Mut zu harten Schnitten und eine klare Agenda.



Claudia Scholz, Jonathan Packroff, Michael Graf von Bassewitz



12 min. 29.08.2025

BY THE NUMBERS

Europe new-car sales rose 4.5% in August, but market remains flat for the year

Automotive News Europe

Stellantis to pause output at 6 plants in Europe amid weak market

U.S. confirms 15% tariffs on EU auto imports started Aug. 1

ZF slashes 7,600 jobs in cost-cutting push

As part of the cuts, ZF's electrified drivetrain division will halt development of EV-related products while shifting investments to technologies including plug-in hybrid drivetrains.



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FINANCIAL TIMES

Europe drags its heels on Draghi plan as global rivals surge

A year after former Italian PM's report on competitiveness, EU implements just 11% of his ideas

ETS 2 is essential to a fair and effective transition, new study emphasises

A new report by the Centre for European Policy Network (CEP) examines the planned introduction of the EU Emissions Trading System for road transport and buildings (EU-ETS 2). Despite political pressure for its modification or postponement, the report concludes that the ETS 2 is indispensable for effective and cost-efficient emissions reductions,...

acea

New commercial vehicle registrations: vans -13.2%, trucks -15.4%, buses -4.4% in H1 2025

30 July 2025

The first half of 2025 proved challenging for the EU's commercial vehicle market, marked by significant registration declines in key markets, amidst an...

Volkswagen cuts output, pauses production at German EV plants, Bloomberg News says

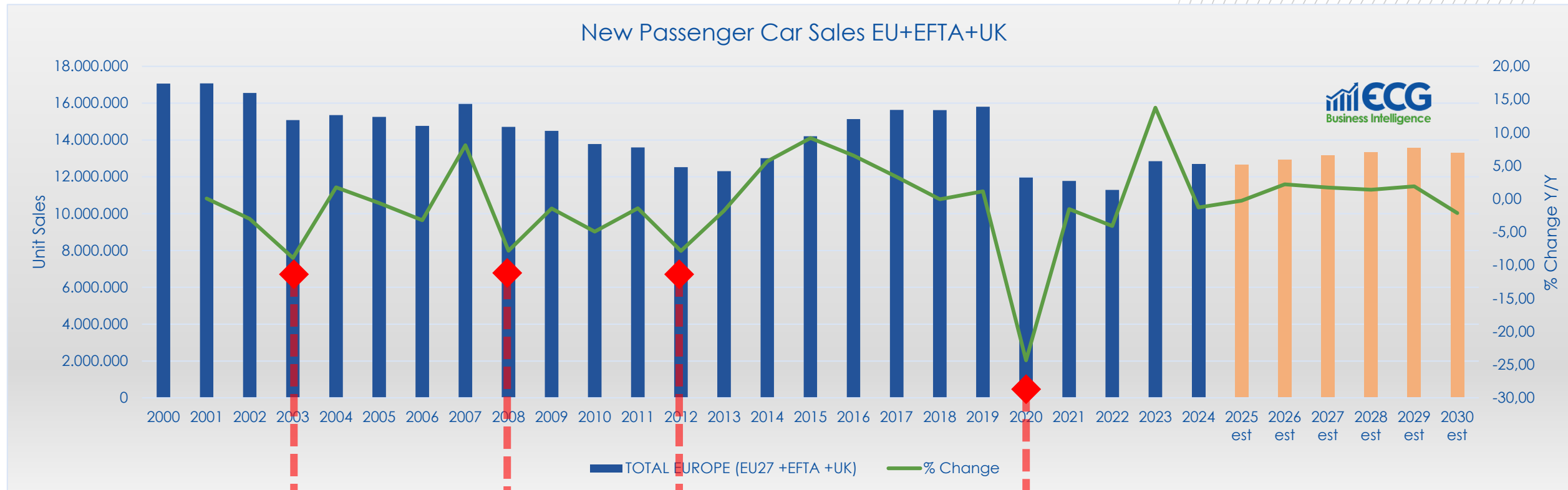
By Reuters

September 25, 2025 9:05 PM GMT+2 · Updated 13 hours ago

Reuters

The development of the automotive industry in Europe

Sales 2000 – 2024 + Outlook : new volume sales



Energy crisis

Financial crisis

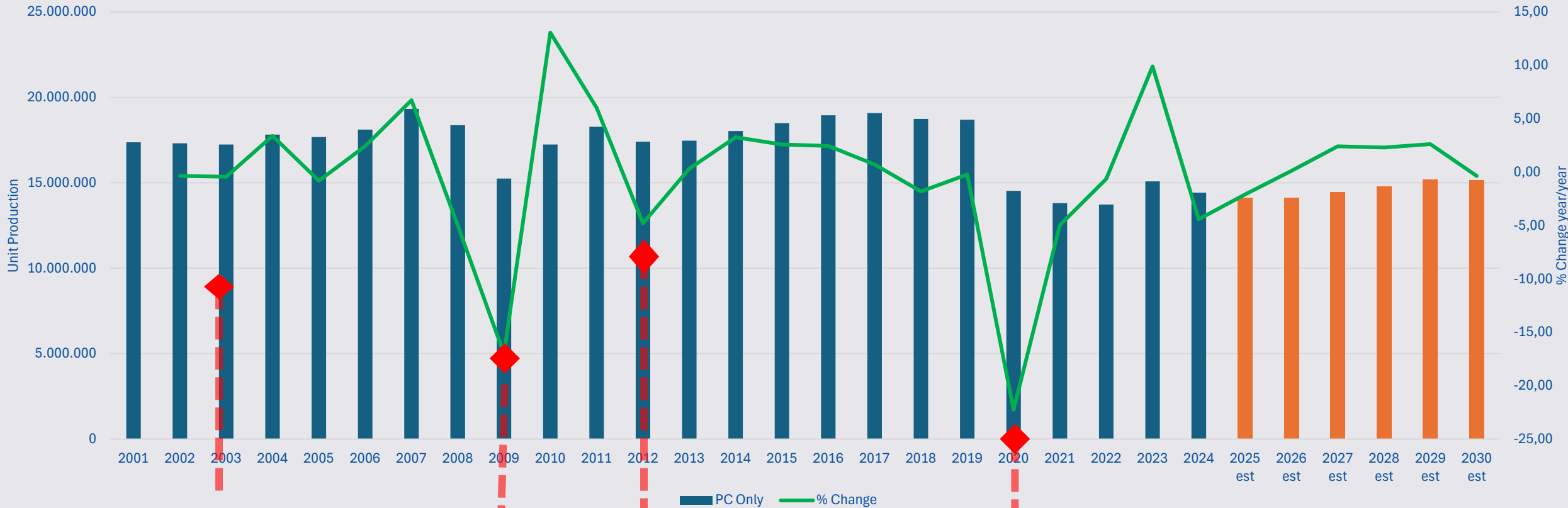
European debt crisis

COVID

The development of the automotive industry in Europe

Sales 2008 – 2024 + Outlook : new volume production

Passenger Car Production - Europe Region (including Turkey and Russia)



European competitiveness in the Draghi report

Challenges

1. Weaker foreign demand and rising competitive pressures from foreign companies
2. High energy prices while continuing to decarbonise and shift to a circular economy
3. World of less stable geopolitics, Europe can no longer rely on others for its security

Solutions

1. Closing the innovation gap, increasing efficiency
2. Plan for decarbonisation and competitiveness
3. Increase security and reduce dependencies

Only a part of the recommendations adopted

The future
of European
competitiveness

Part A | A competitiveness strategy for Europe

SEPTEMBER 2024

“Draghi report”

Legislative simplification pleaded for

To start lowering the “stock” of regulation, the report recommends appointing a new Commission Vice President for Simplification to streamline the acquis, while adopting a single, clear methodology to quantify the cost of the new regulatory “flow”.’

Draghi report, 2024 September

- The burden of legislation has been singled out by ECG at its **Dinner Debate** in March 2025, supported by MEP Alexandr Vondra
- European Commission’s Omnibus Package launched in February 2025
 - streamlining legislation on sustainability reporting, due diligence, investment and defence – *but progress too slow*



Photo © ECG : Wolfgang Göbel, ECG President, Dinner Debate, 18 March 2025, European Parliament, Brussels, Belgium

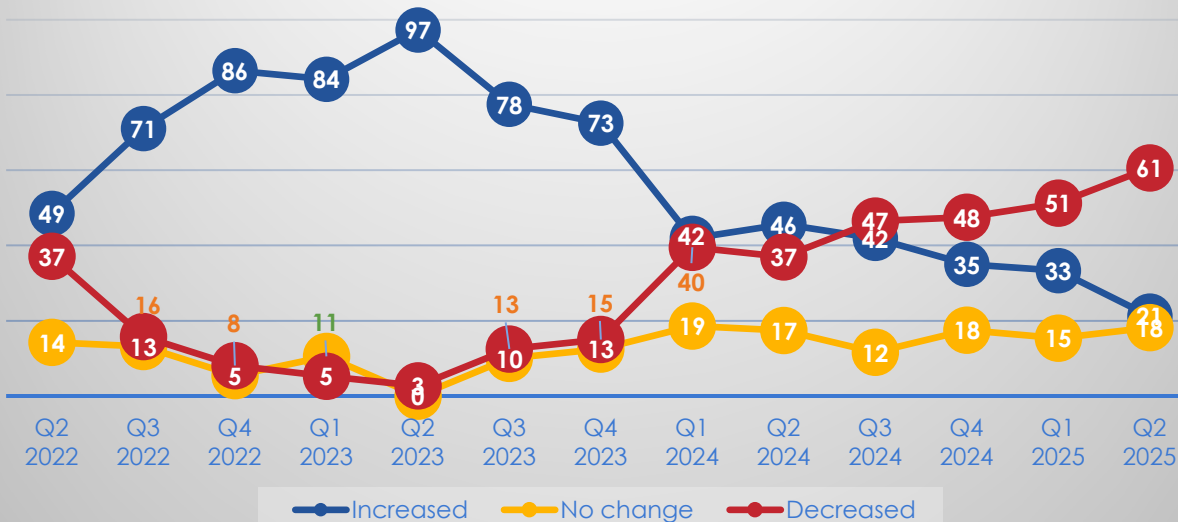
ECG highlights the urgency of simplified regulation in the FVL industry following the European Commission’s Action Plan for the Future of the European Automotive Industry

Brussels, Wednesday 19 March 2025

ECG - the Association of European Vehicle Logistics, hosted a Dinner Debate on 18 March 2025 in the European Parliament in Brussels, titled “Driving the future: the role of finished vehicle logistics in Europe’s automotive industry.”

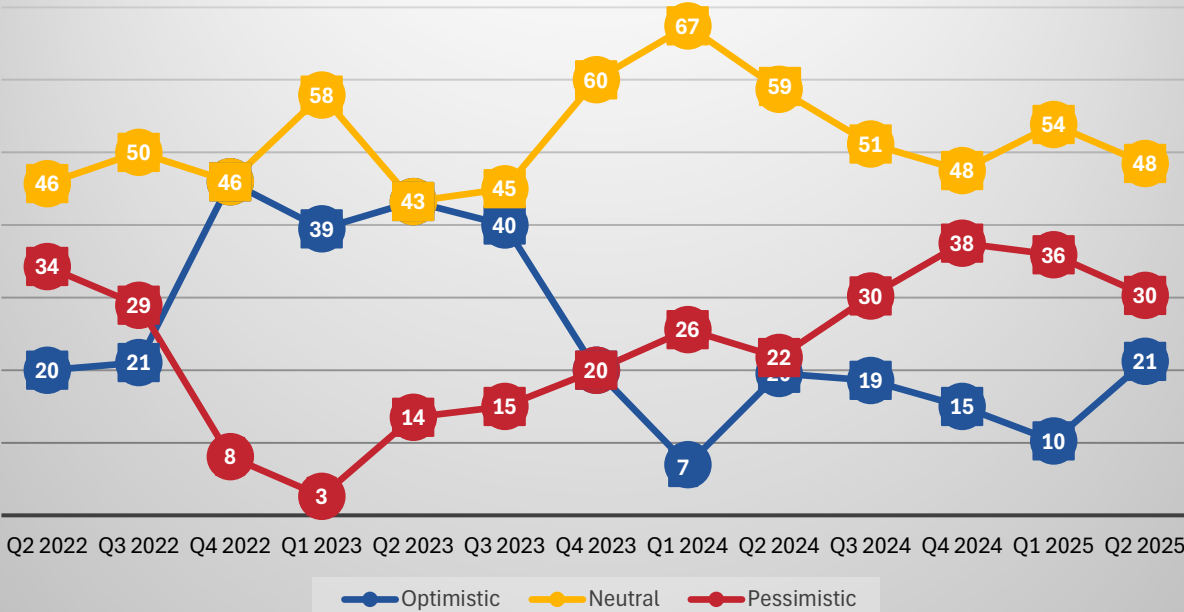
FVL Business sentiment

How has the volume of your business changed in last quarter?



But cautiously optimistic business sentiment remains

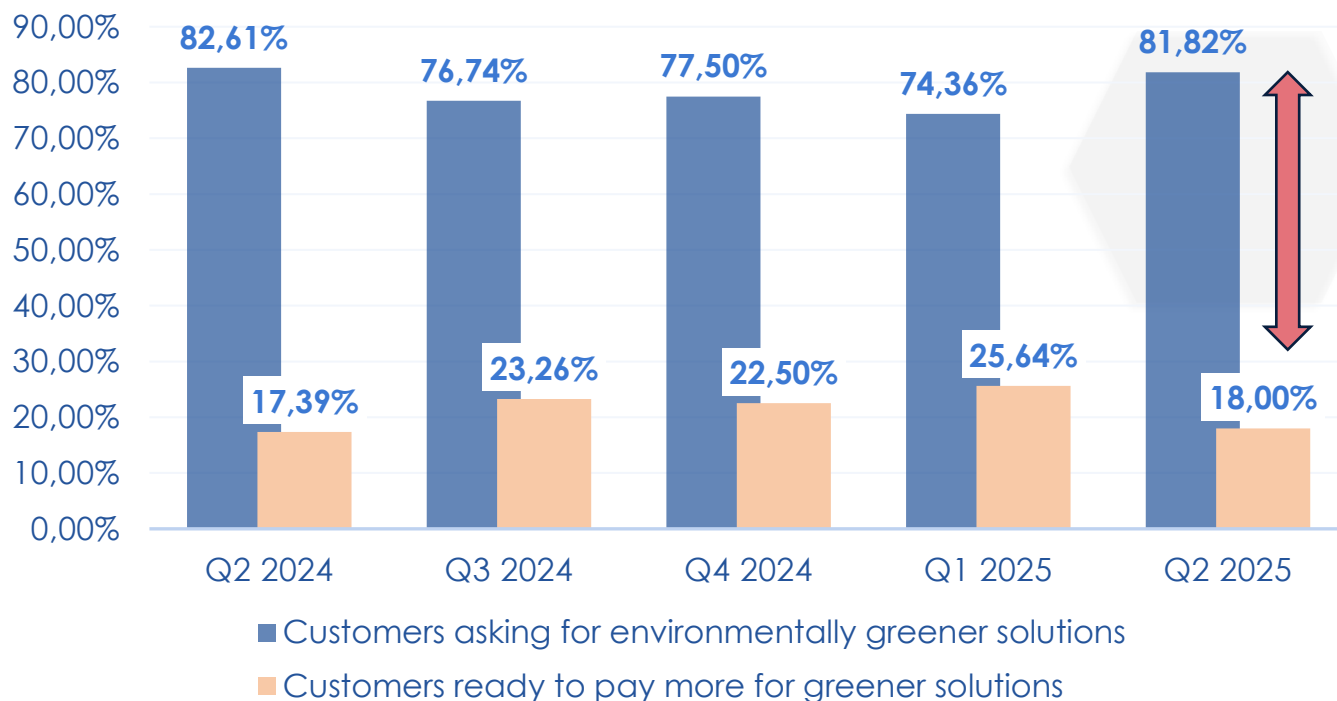
How do you feel about the next six months?



Decreasing volumes reported by FVL executives

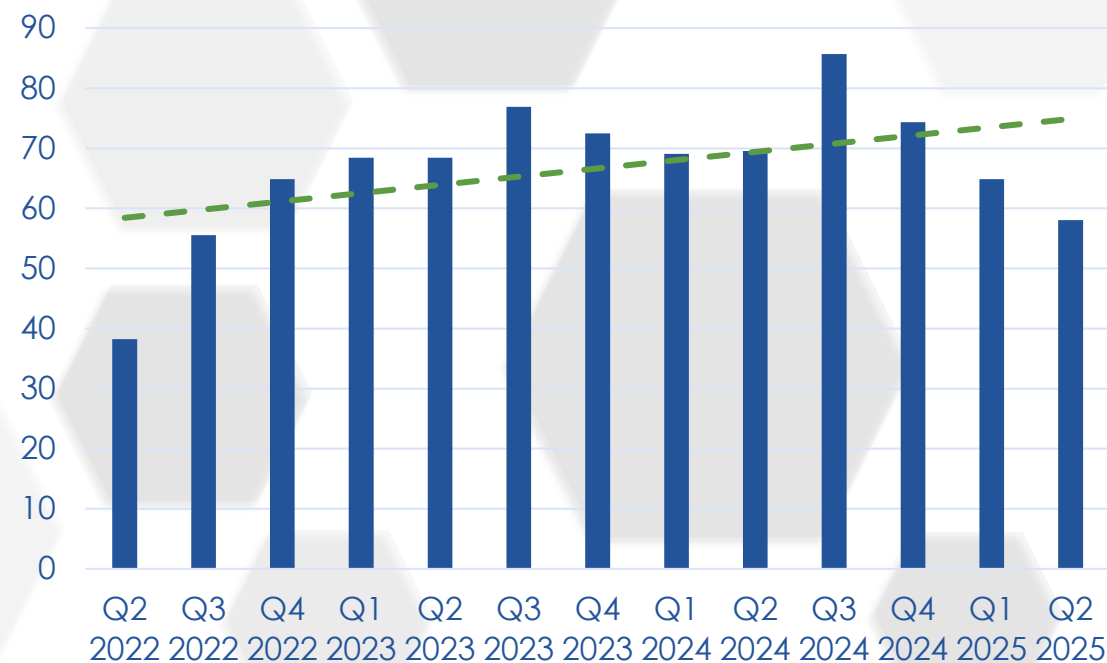
Source: ECG Costs & Confidence Trends Survey

Overall green investments



Discrepancy between requirements and financial contribution towards greening automotive assets

Inclination to invest in trucks in the next 6 months



But there is a steady interest of FVL executives to invest in new trucks, including greener solutions

What ECG stands for

ECG is the facilitator of **innovation**,
improving the **efficiency** of the FVL market,
promoting positions and creating a **lasting impact** by
influencing stakeholders.

1. Closing the innovation gap & increasing efficiency

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Tech Board
OEM-LSP-IT company collaboration



Identifying industry tech challenges and facilitate the uptake of solutions to enhance cost efficiencies, resilience, sustainability

Rail Initiative



- Raise awareness of the challenges to rail transport
- Identify key areas to improve efficiency
- Improve planning and reliability

eInvoicing in FVL



Joint initiative with Odette International to cover automotive needs for invoicing in the EN16931 data model



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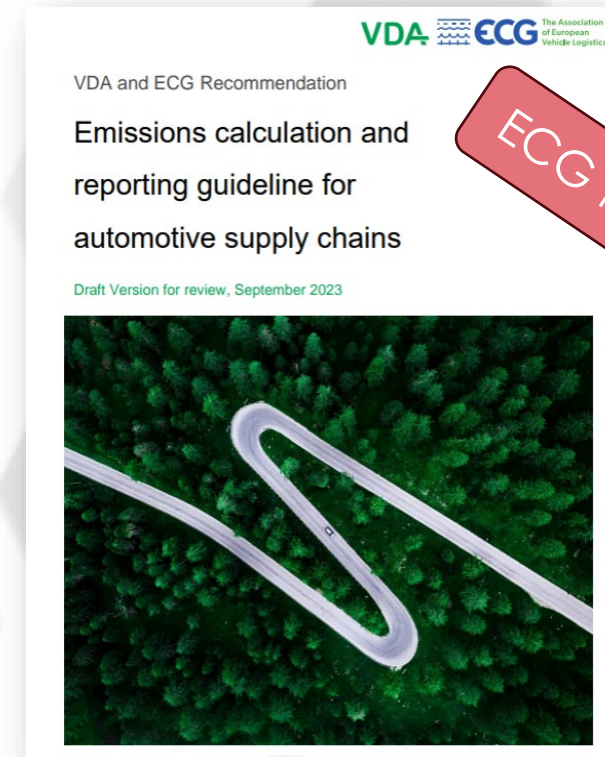
3. Increase security and reduce dependencies

Emissions calculations
version 2 of the guideline soon published following various pilots



One methodology to calculate and report on emissions in the industry
Same method / same dataset / same routing model / same calcul. approach

Sustainability Days will be organized on 4-5 February 2026, in Würth, hosted by Daimler Truck: to explore the options to make the FVL industry greener



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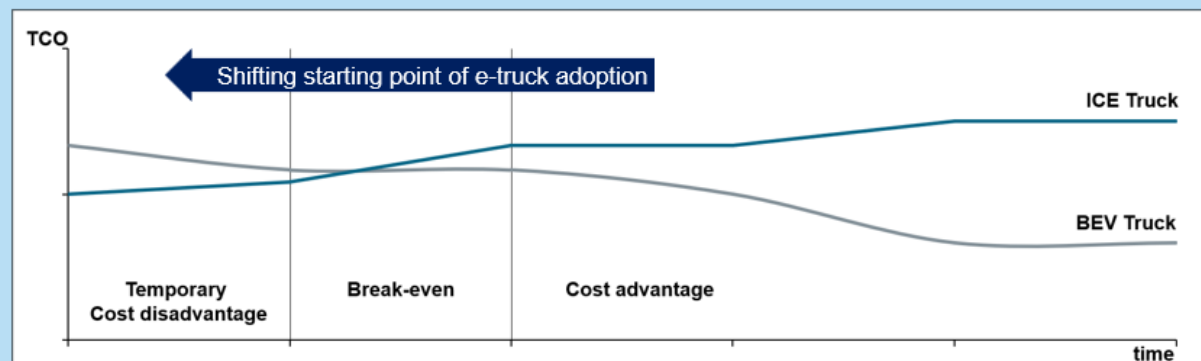
Green Cost Calculator works have started



Enhancing Transparency and Acceleration of e-Truck Adoption through Dynamic Cost Monitoring

ECG toolbox

- ⚡ Temporary cost disadvantages of electric trucks cannot be **transparently presented** for contractual agreements between OEMs and LSPs **over a longer period up to cost parity and beyond**
- ⌚ LSPs are **not investing** in electric trucks
OEMs are **not receiving adequate market offers** that reflect their CO₂ reduction targets
- 📖 This wait-and-see attitude is countered with a transparent solution that **reflects dynamic conditions** such as electricity prices and the residual values of trucks
- 📈 The **adoption** of electric trucks is being **accelerated**



Dynamic cost parameters:
Vehicle price, residual values, subsidies, fees, charging infrastructure costs, ETS II Charges, Toll Charges, additional legislative fees and charges, Energy prices etc.

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Calculators/ Initiatives	Standardised calculation approach	Integration of logistics concepts	Showing dynamic development over time	Externally validated cost parameters
SFC – Fleet Electrification Coalition	✓	✗	✗	○
ifeu Heidelberg – Varo TCO Tool	✓	○	✗	✓
PTV EV Route Planner	○	✗	✗	✗
Volvo TCO Tool	○	✗	✗	✗
<u>MAN</u> Truck TCO	○	✗	✗	✗
IVECO NG TCO	○	✗	✗	✗
Scania Bio-Diesel TCO	○	✗	✗	✗
...				
Target profile of DCTT	✓	✓	✓	✓

Existing tools are not suitable for the intended business use case:

- Either only transport processes are considered instead of **logistical concepts**,
- the analysis is **not dynamic** and does not cover a longer period of time,
- or cost parameters are not externally validated and are not suitable **as a basis for a contract**

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DEFENCE

Ursula von der Leyen to ask EU leaders for annual check-up on rearmament

EURACTIV

European Commission admits 'divergent' oversized transport rules and rail gaps are delaying Military Mobility plan

Published on 17-09-2025 at 12:20

RailTech.com

EU transport funds to double in bold new budget plans, tenfold rise for military mobility

The EU has proposed doubling its transport infrastructure budget for the 2028–2034 period, setting aside €51.5 billion under the next Connecting...

17 Jul 2025

Made in France

TRANSPORTS ET LOGISTIQUE \ FERROVIAIRE \ LOGISTIQUE

En pleine remontée en armement, la logistique militaire doit s'adapter à la logistique civile

February 28, 2025

Sweden orders military trucks from Scania and Volvo to boost armed forces logistics



DEFENCE INDUSTRY EUROPE

PROJECT CARGO JOURNAL

Rheinmetall German

euro news.

Business > Business

'Europe First' turns to European defence, reducing US dependence

from

EVENT

Why European military struggles with rail

ICS

Published on 26-06-2025 at 09:42

RailFreight.com

Hybrid war threatens all of Europe, warns Danish PM

Key summit — live updates

EU leaders will discuss defense and support for Ukraine when they meet in Copenhagen on Wednesday. The informal summit comes at a critical moment...



Gastkommentar – Global Challenges

Handelsblatt

Sicherheitsgarantien – Europa muss Russland zu Zugeständnissen zwingen

German army approaches big firms for NATO logistics aid, Handelsblatt daily says

By Reuters

New Working Group on High & Heavy and Military in progress

Military mobility

- **Generalmajor Ulf Häussler, Director of Operations and Planning, NATO** will offer insights today on European defence and strategic thinking and the new prospects offered for vehicle logistics



.... One more thing

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