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ECG Congress: Chinese car invasion reshapes European logistics

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Roel Jacobus 21 Oct 2025 om 08:08



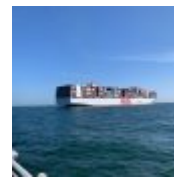
ECG Herfstcongres 2025 in RAI Amsterdam © 2025 Roel Jacobus

One in 20 new cars in Europe are already Chinese, which China considers “far too few”. Manufacturers want to import even more as well as produce in Europe. These and other shifts pose major challenges for automotive logistics.

The federation of European automotive logistics ECG counted a record number of participants at its annual main congress: with 600 registrations, the ‘sold out’ sign hung in Amsterdam weeks in advance.

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carmakers or OEMs (original equipment manufacturers) as they are called in the industry.

“Logistics service providers and their customers depend on each other more than ever to improve the efficiency of their supplychains,” says ECG chairman Wolfgang Göbel. “Everyone’s costs are under pressure from growing competitiveness, geopolitical uncertainties, tariff wars and technical changes and increasing regulations. Technology is the common thread for reaching good commercial and operational agreements together – based on data. We are, for instance, working on a Green Cost Calculator to weigh up emissions and costs in a comparable way for each transport order. In that context, we are organising a two-day event on sustainability in February, in Würth where Daimler Trucks makes electric trucks.”

European tariffs have no effect

At the ECG congress, the analysis and outlook for the European car market is always looked forward to. “European manufacturers are groaning under a perfect storm: a combination of US tariff increases, Chinese market invasion, oppressive European emissions regulations and the loss of the Russian market,” outlines Colin Couchman of S&P Global Mobility. “The most positive news is that the decline of the European car market has levelled out. But by 2024, Europe did change from an exporter to an import continent. The change was driven by the rise of China as the world’s largest market. Electrification and digital technology was picked up by consumers there at lightning speed and a fierce price war raged between at least 150 brands.”

“Like the United States, the European Union also

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it still remains financially attractive for the Chinese to sell in Europe (at more than double the Chinese price, n.v.d.r.). We expect the rapid growth of Chinese exports to level off from 2027 onwards, but they are actively working to open or acquire European factories. By doing so, they will produce closer to their end customers and partly avoid import tariffs.”

Chinese car market is driving the world

Attention was thus particularly sharpened for the presentation by Chris Zuo, executive vice president of the China Automotive Logistics Association (CALA), ECG’s Chinese counterpart. “Over the past 25 years, car sales in China grew from 200,000 to 31 million a year. The number of cars on China’s roads increased from 16 to 359 million during that period. Ten years ago, buying a car was the first time in 70% of cases, now it is only a third. Half of the purchases are replacements and in 14% of the cases it is an additional vehicle. The Chinese are also rapidly switching to Chinese brands: from 38% five years ago to 66% this year.”

That strong domestic market is growing hand in hand with exports, Zuo continued. “Exports hovered around 1 million cars for a decade but rose by leaps and bounds from 2020 to 6.4 million last year. Of these, 349,000 cars went to Europe, accounting for 5.1% share of the European car market of 6.46 million cars. That percentage is too little, so manufacturers are investing in both low-cost and luxury cars, in production in Europe and in their own roro ships for more supply capacity. In 2021, there were 11 Chinese ro-ro ships with room for 48,000 cars, this year there are already 61 with a capacity of 365,000 cars. Alternatively, 104,000 cars were sent to Europe in



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the biggest export destinations were Mexico (280,100), United Arab Emirates (228,900), Russia (180,100), Brazil (161,300), Belgium (149,600), Saudi Arabia (147,300), Australia (143,700) and the UK (136,300). Access to the European market is mainly through Port of Antwerp-Bruges, Barcelona, Bremerhaven, Amsterdam, Southampton, Liverpool, London and Piraeus.”

Read more below the picture.



Chris Zuo of China Automotive Logistics Association
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Stones in backpack

“The good news is that the European market remains stable, but the shift in market shares cannot be underestimated. It will be a challenge for logistics service providers to keep costs under control through efficiency gains,” says Wolfgang Göbel. “After the sharp capacity reduction of our industry due to the covid crisis four years ago, our customers booked transport and storage capacity without too much negotiation to be sure of their place. Now another correction is likely to come and in the process everyone will have to use common sense.”



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Klaus Zelmer of Skoda, the first ceo of a carmaker ever to speak at the ECG congress. “Last year we saved over 1 billion euros in our operation and products and we want to repeat that this year. We cannot copy the Chinese 9-9-6 (nine-to-nine, six-day work system) to Europe. We can, however, achieve a lot through technology and bring new products to market faster. European regulatory authorities can also help us by not constantly putting extra stones in the backpack of industry and logistics.”

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