

**ECG**  
CONFERENCE  
2026

WINDS OF CHANGE  
Understanding tomorrow,  
navigating towards the future.



Mark Hindley

President

ECG

Transformation of the automotive industry



New technology



Geopolitics and changing trade flows



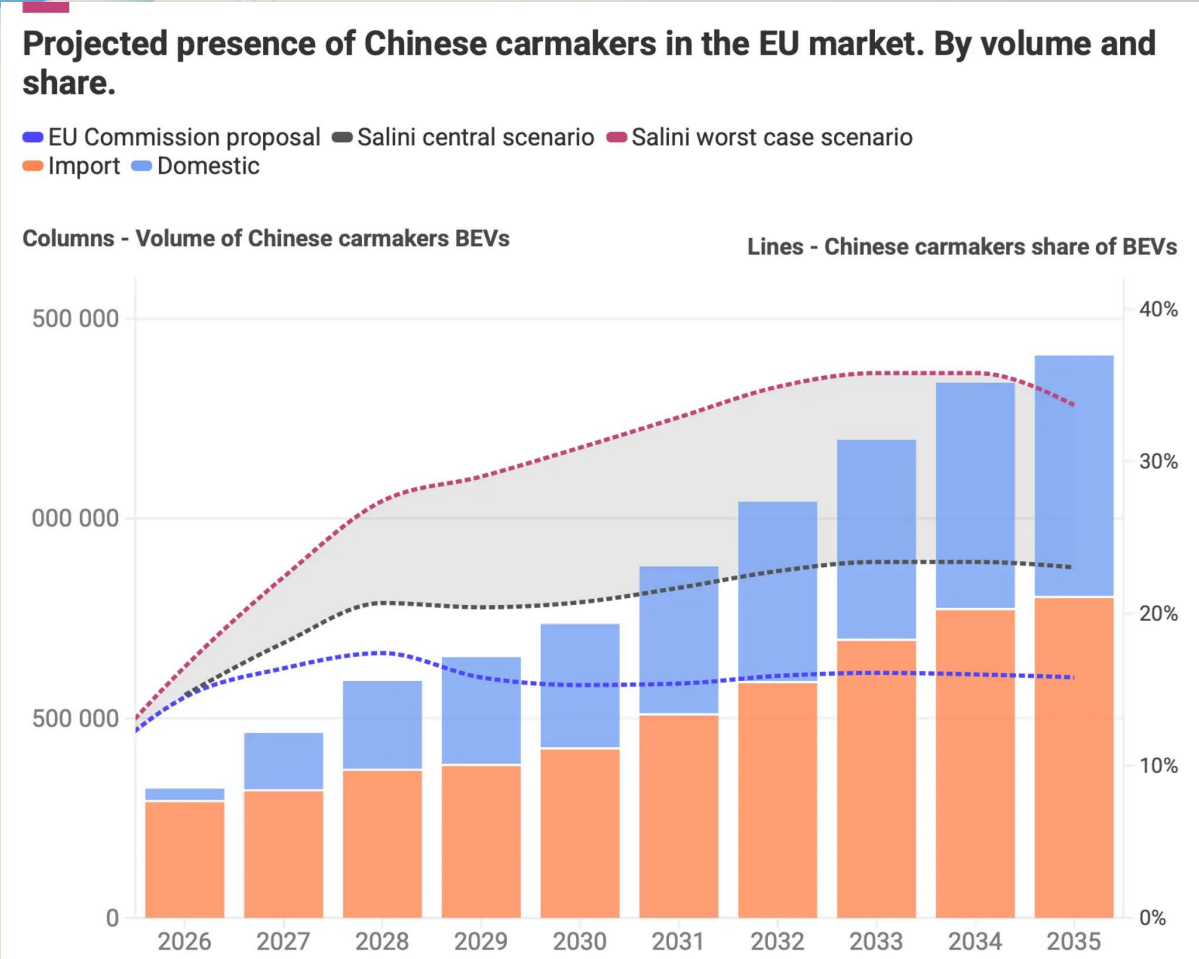
Sustainability



Forces reshaping our industry



# Impact of Chinese OEMs import & production



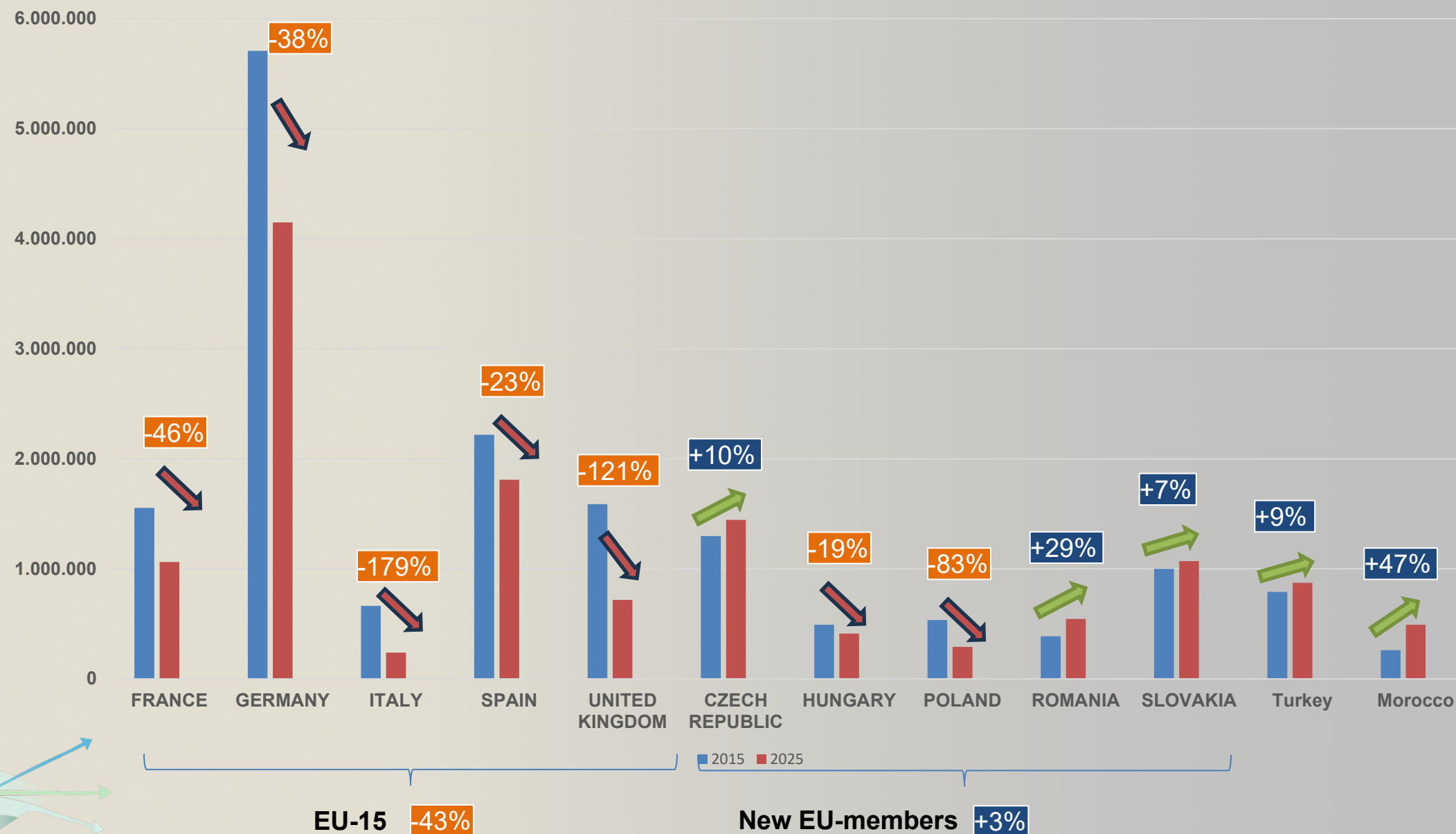
Source: T&E Analysis, GlobalData • The volume of Chinese carmakers BEV is assumed constant in the three scenarios



# New automotive production plants & lines in Europe 2025-26



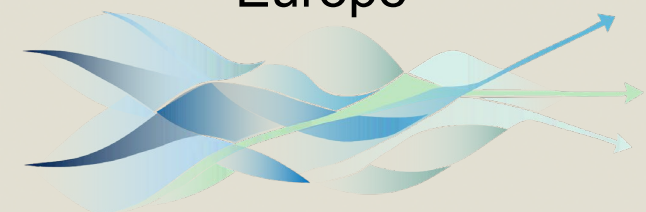
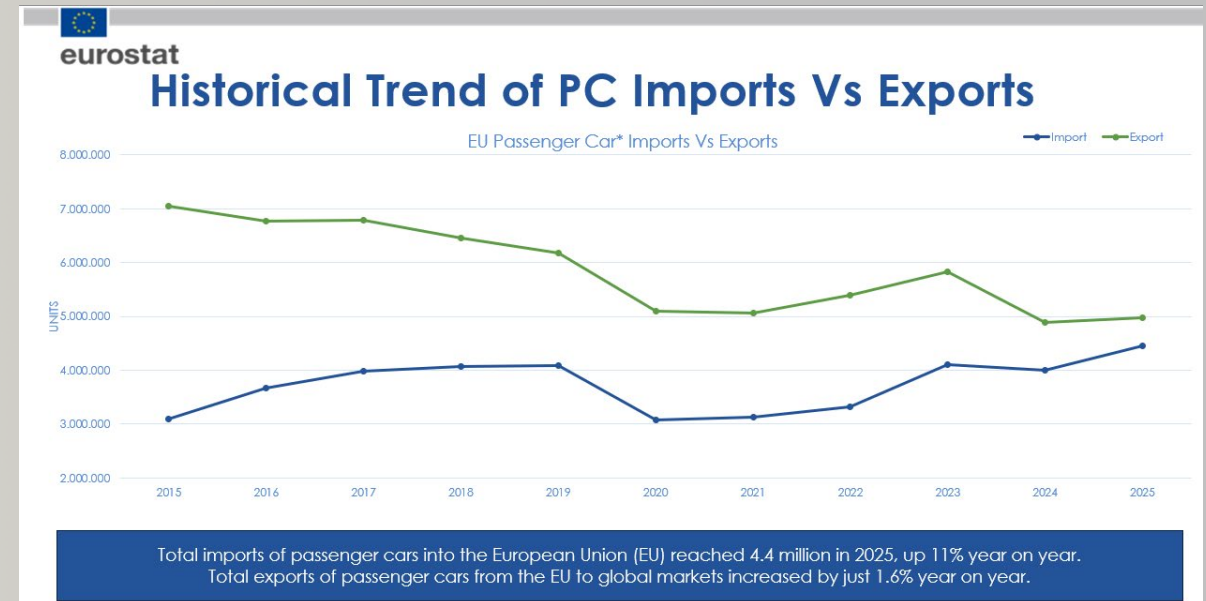
# Evolution of domestic vehicle production (2015 vs. 2025)



Source: OICA

# Changing vehicle flows

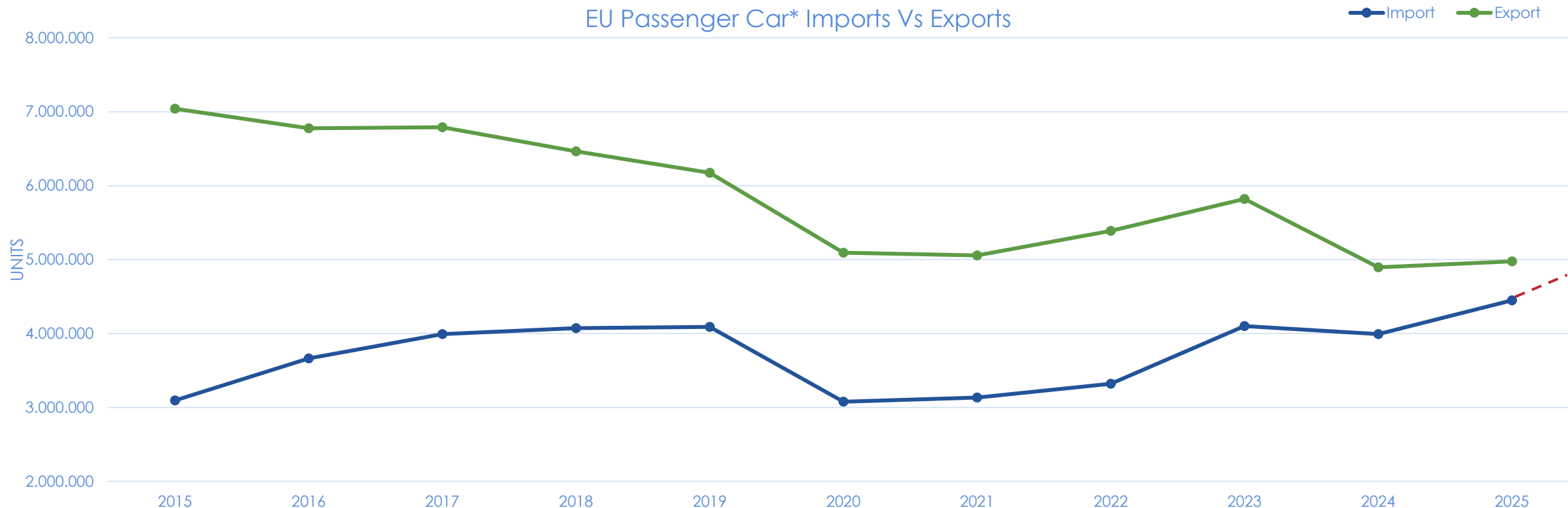
- Production is shifting between regions and countries
- Imports into Europe are increasing in importance
- Export patterns are changing
- New origins and destinations create new logistics requirements
- Imbalances increase repositioning and empty capacity
- Bigger vessels add extra strain to ports
- Shift in production to Central and Eastern Europe





eurostat

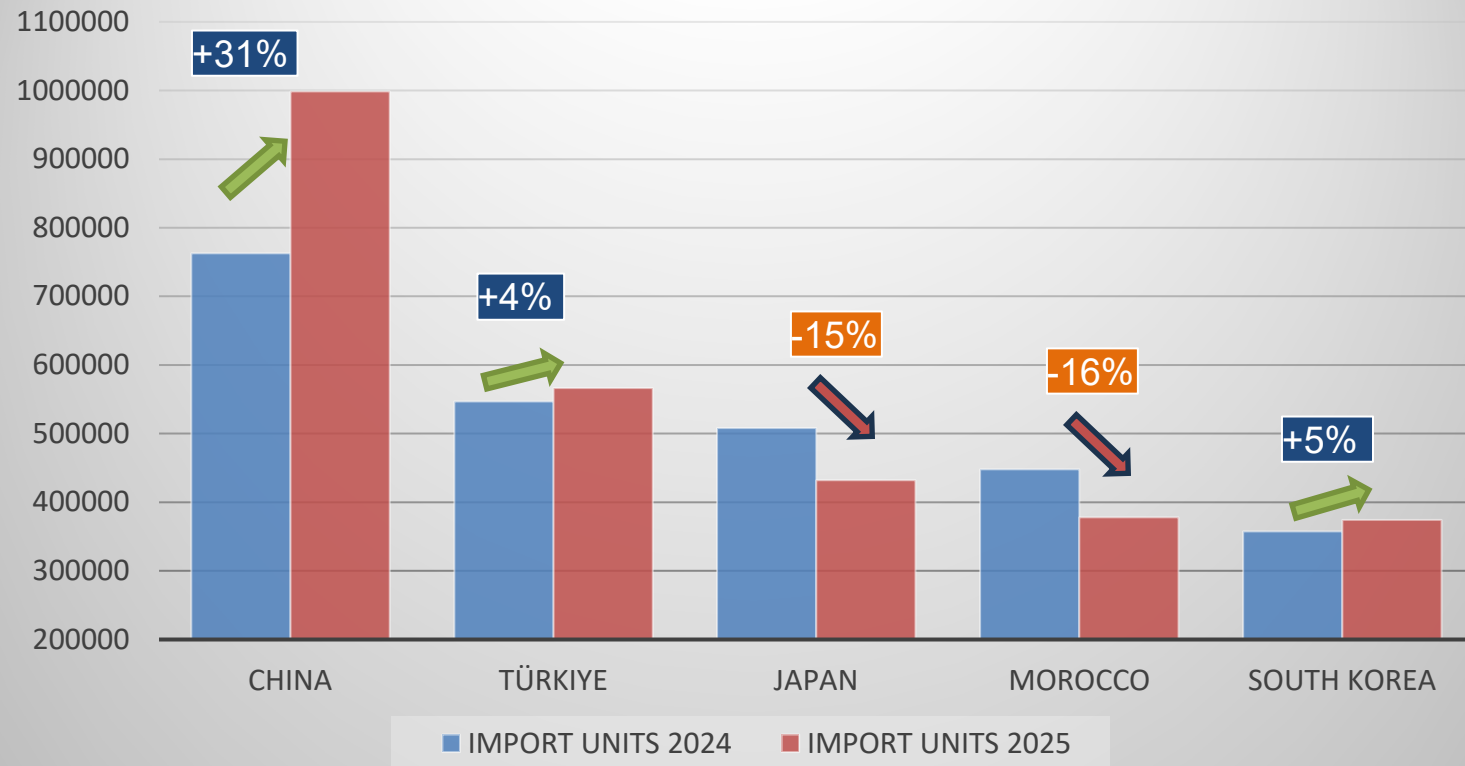
# Historical Trend of PC Imports Vs Exports



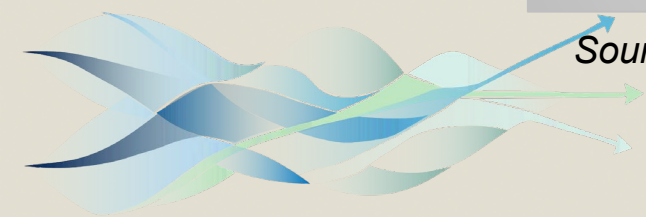
Total imports of passenger cars into the European Union (EU) reached 4.4 million in 2025, up 11% year on year.  
Total exports of passenger cars from the EU to global markets increased by just 1.6% year on year.

Source: Data sourced via Eurostat, 17.03.26  
Passenger Car as HS 8703 family, includes new & used.

## EU New vehicle imports (by volume)



Source: Eurostat



# Disruptions in shipping

- Export patterns are changing – new automotive ports emerge
- Bigger vessels create more capacity – newly commissioned vessels arriving to the market
- Shipping global business – sensitive to geopolitical conflicts
- Containerised car transport adds to complexity

Reuters

## COMMENTARY: Panama Canal stress shows the real shipping squeeze may still be ahead

The headline grabbing global attention is simple enough: a shipowner reportedly paid more than \$5 million for a single Panama Canal transit...

3 weeks ago

FT Financial Times

## Ships' captains paid \$100,000 a month to transit Strait of Hormuz

Salaries and bonuses spiral for seafarers willing to risk perilous trip through waterway in face of Iranian attacks.

1 day ago

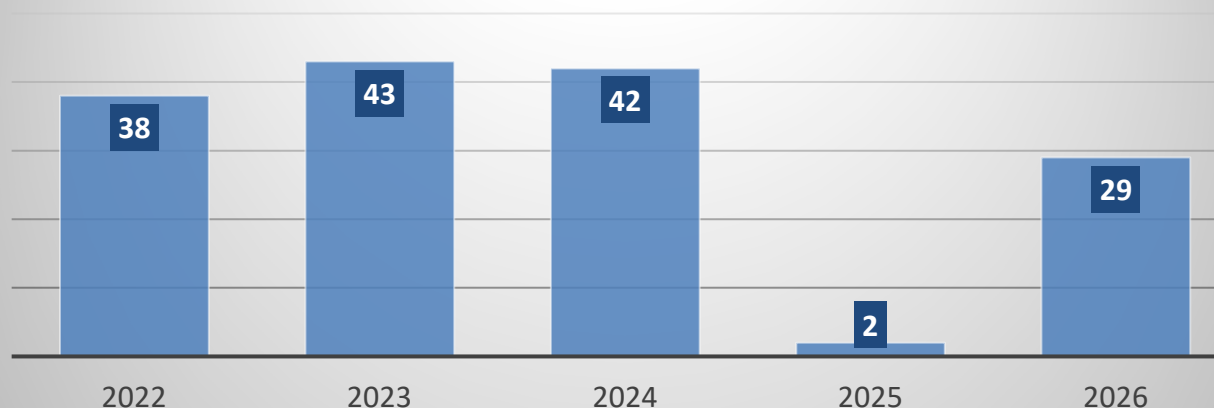
WorldCargo News

## Chinese vehicle manufacturers seek non-specialist ships

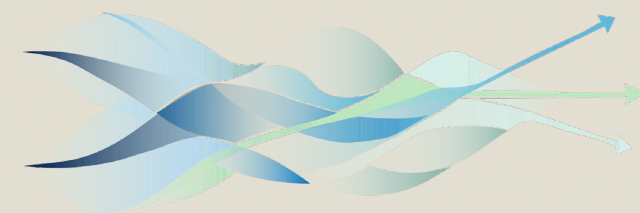
The shortage of available Pure Car and Truck Carriers (PCTC) capacity has encouraged the use of containers, flat racks and multipurpose...

08 Jul 2026

## N° PCTC vessel orders



Source: VesselsValue



# Situation in ports

- Imports into Europe are increasing in importance
- Bigger vessels transport more cars – adds to the already visible port congestion issues
- Production & export patterns are changing – new automotive ports emerge
- New automotive ports emerge, due to:
  - New export/import patterns
  - Congestion in established ports
  - Unstuffing containers can't be done in automotive terminals

 The Guardian

## EU deal with China limits imports of hybrid electric vehicles

Brussels uses WTO rules to quickly impose 350000 vehicle-a-year quota, which will halve Chinese market share to 3%

60 minutes ago

 The Loadstar

## News Europe's auto sector faces 'perfect storm' as exports slump and imports surge

EU automakers and logistics providers face pressure from US tariffs, Chinese imports, overcapacity, storage shortages and fuel costs.

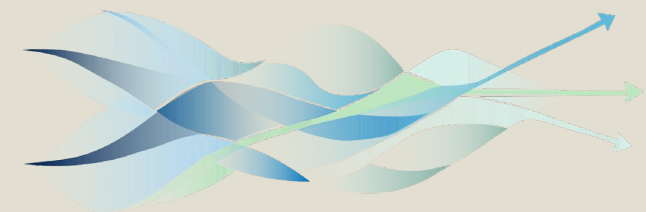
12 Jun 2026

 South China Morning Post

## China-made vessel carries record EVs in shipment from Shanghai to Europe

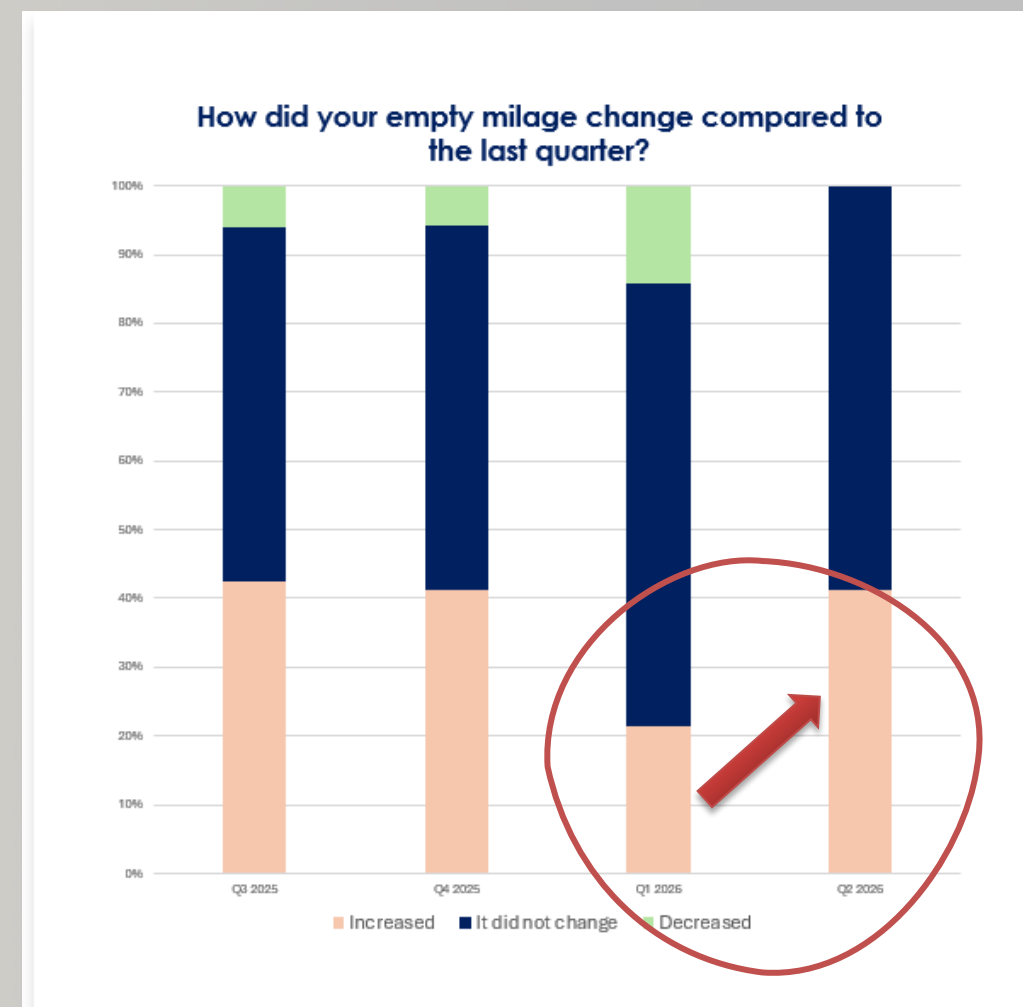
A new China-made roll-on, roll-off carrier set a new domestic record for number of vehicles shipped in one voyage.

28 Jul 2026

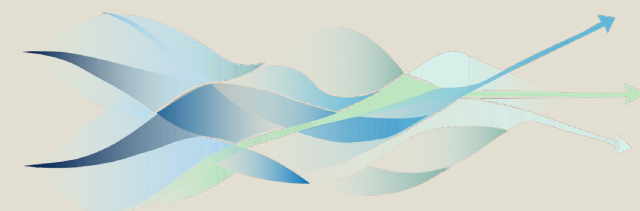


# Disruptions in trucking

- Inefficiency grew from 20% to 40% in the past quarter
- Due to:
  - Changing vehicle flows compounded by increased production imbalance between East and West
  - Rail inefficiencies lead to truck being used as a back-up solution for some flows – this can lead to empty mileage
  - Increase in the number of loading points, due to more compounds and new ports



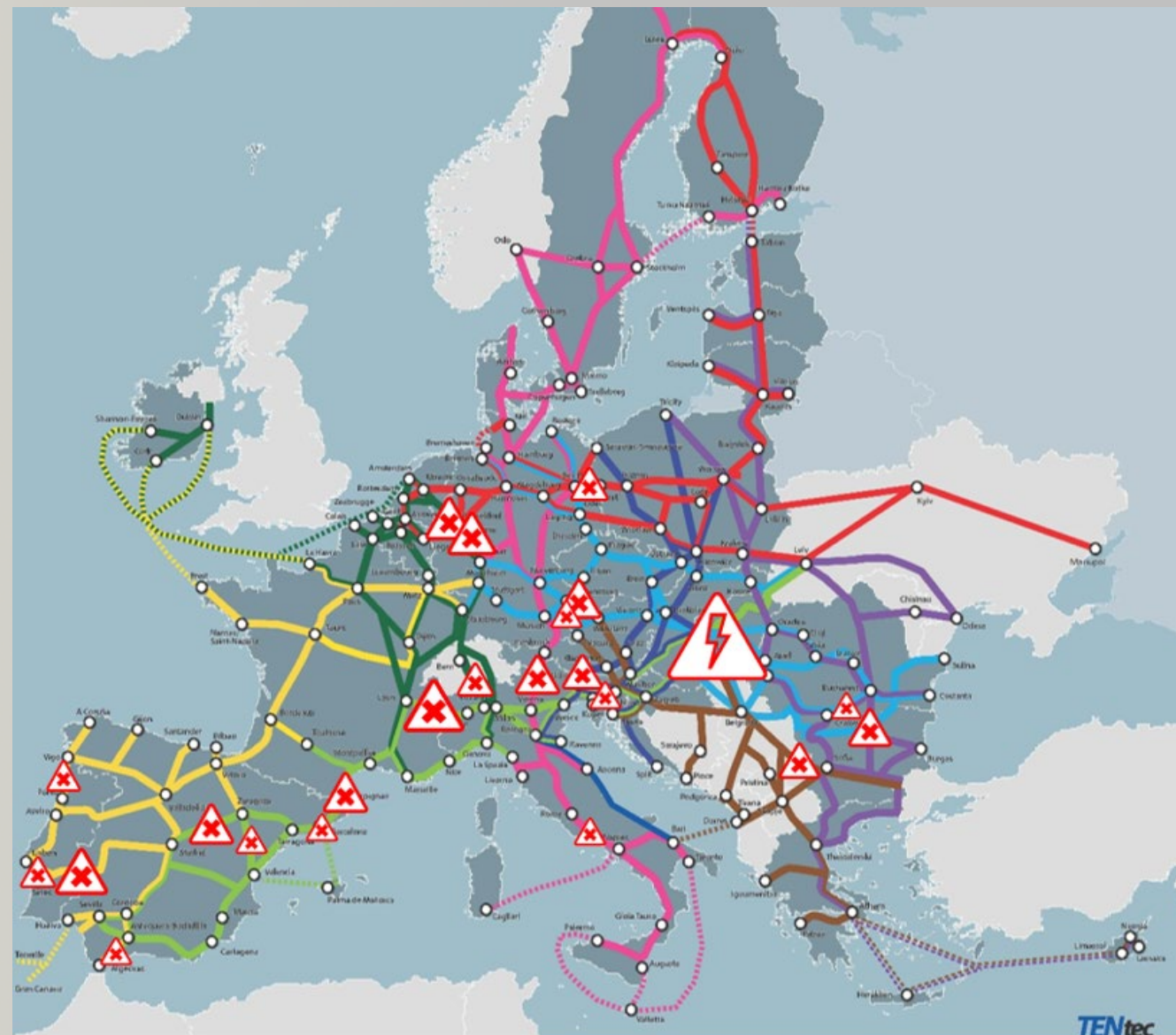
Source: ECG's Quarterly Cost & Confidence survey, Q2 2026



# Disruptions in rail

- Infrastructure works are a major concern and disruption in the Rail industry
- Production imbalances between East and West lead to empty loads and inefficiencies
- Ageing rolling stock, not flexible equipment, not suitable for heavier Electric Vehicles

## Railway line closures in Europe (status as of 21 August 2026)



Source: ERFA

# ECG's addresses the situation

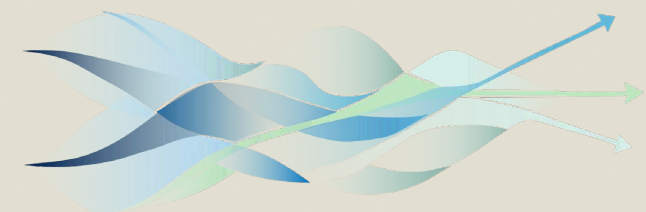
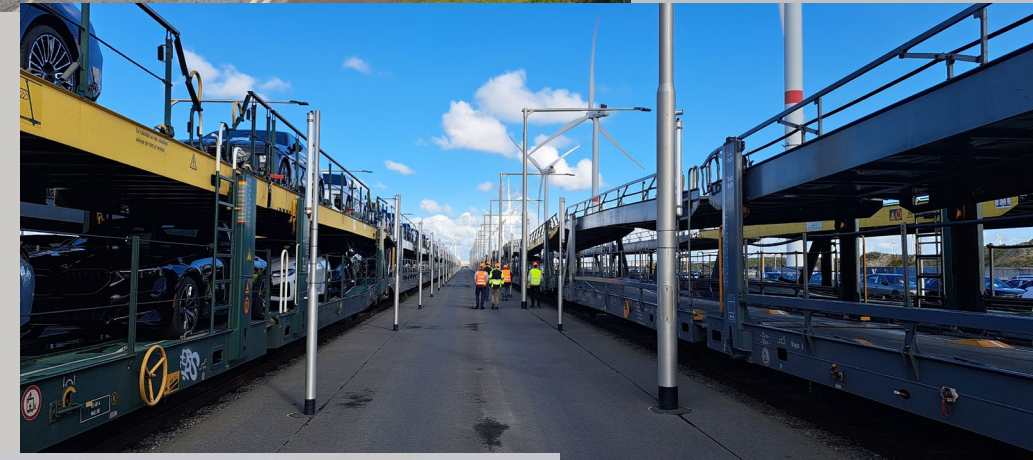
- ECG provides coordination platform with the OEMs (FVL Industry Meetings)
- Facilitates global outreach to other regions, e.g. via delegations
- Launched the Rail Initiative: gathers all major stakeholders
- Focuses on Technology: ECG Tech Board created and launch of the AI-Day events
- Focuses on Sustainability: Support with the deployment of Electric Trucks & organization of Sustainability Days
- Issues the Business Intelligence reports
- Organises Qualification & Training: Induction Course





# Navigating the way forwards

- Better visibility: earlier information, better forecasts and more transparency on network changes.
- Stronger commitment: dedicated capacity needs a minimum level of predictability.
- Shared responsibility: resilience has a cost and investment risk cannot sit only with LSPs.
- Better cooperation means fewer capacity shortages and fewer costly short-term fixes.



A dramatic landscape featuring a vast body of water under a heavy, dark sky. Sunlight breaks through the clouds, creating a bright, shimmering path across the water's surface. The foreground shows dark, silhouetted hills and a small cluster of buildings on the left. The overall mood is one of hope and resilience, with the text overlay reinforcing this theme.

Future success will come from trust and  
shared understanding