

Automotive
LOGISTICS



ECG

The Association
of European
Vehicle Logistics



ECG CONFERENCE · OCTOBER 2026

Finished vehicle logistics around the world

Capacity, competition and digital trends beyond Europe

Global vehicle logistics

Vehicle logistics shipping flows, regional networks and operations are facing realignments in volumes and costs as the industry responds to structural shifts



Trade response & localisation

Tariffs and uncertainty are reshaping regional assembly and distribution



Chinese exports & competition

New volumes and players are changing shipping, port and terminal use



Geopolitical supply & energy shocks

Iran, Russia-Ukraine and wider conflicts fuelling inflation, borrowing costs and global shipping disruption



Climate impacts

Drought, extreme weather and El Niño disrupt shipping and regional logistics

Not only a PCTC shipping story – these forces are reshaping inland transport and distribution

Many regions face capacity issues, however as global sales volumes stagnant or decline, do we need investment, or network redesign?

The answer is a mix of both – with stronger emphasis on collaborative, digitally integrated operations



Higher costs, localisation and digital acceleration with new risks and higher levels of market uncertainty



Rising costs – diesel,
insurance, drivers



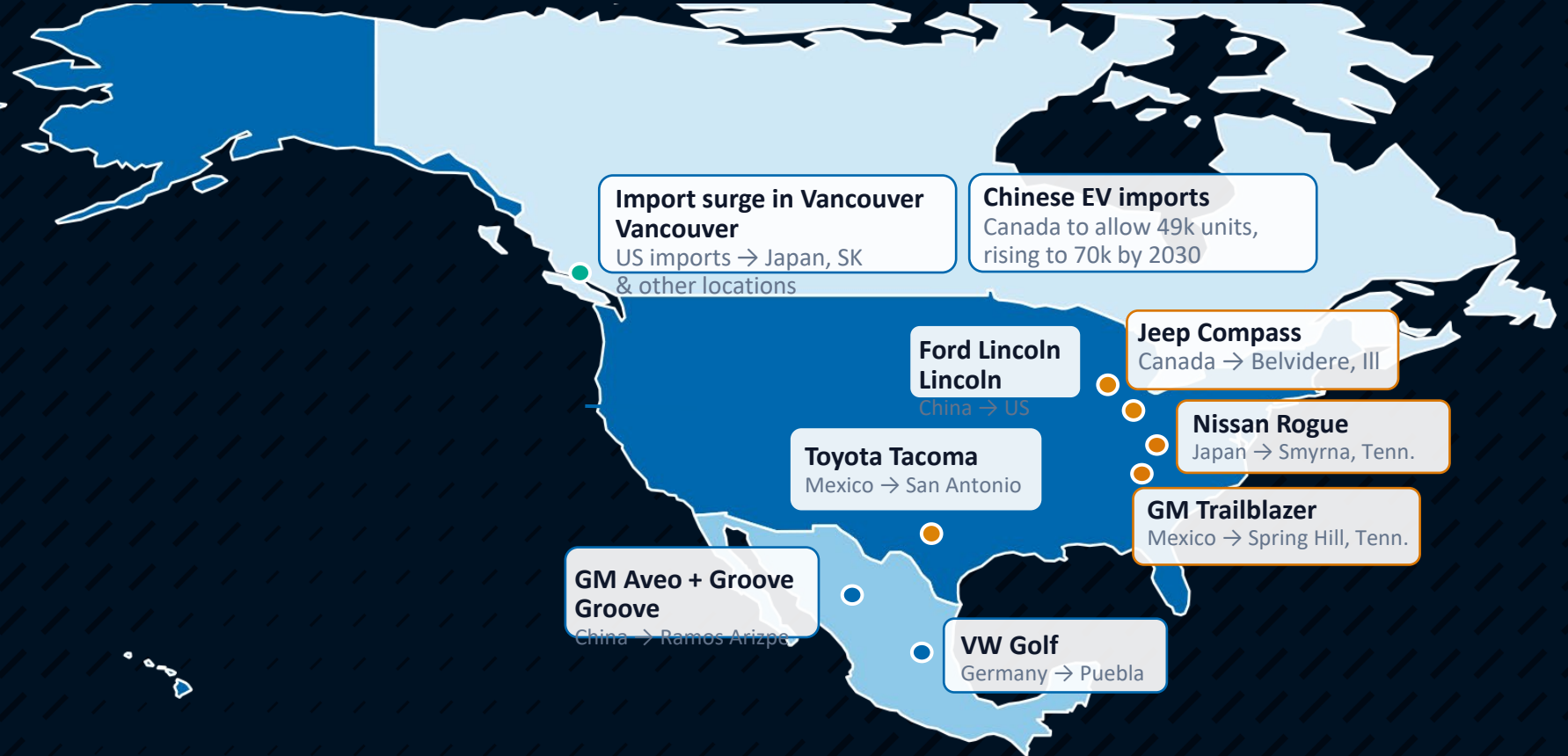
Theft & Fraud – security in
Mexico, rising fraud in US



Localisation – local
for local, US & Mexico



Practical AI – TMS, RFQs,
visibility, claims



The North American map is changing but long-term USMCA and trade terms unclear

The economics of FVL are changing across contract and spot buys, while consolidation is on the rise for road and rail transport

CARHAUL CONSOLIDATION

Proficient Auto Logistics

~25%
OF THE MARKET

10 acquisitions since its 2024 IPO

2024

Auto Transport Group

2025

Brothers Auto Transport

2026

Hansen & Adkins



OEMs concerned about pricing power, fleet control and financial risks in consolidation

Growing willingness to update legacy tools and processes to cut waste



Network view of truck lanes

OEMs want shared view of routes to fill empty backhauls and cut unproductive miles



Connected systems and visibility

Integration of core systems with TMS, YMS, transport ordering and network visibility



Automated inspection and claims

VIN-level quality capture at every step, with AI analysis of damage and claims



Resilient – but under growing pressure to adapt logistics models



- China import surge before the 50% tariff change – inventory levels remain high
- US exports declining following tariffs, production shifts and logistics costs rise
- **Watch next:** Shift to assembly for Mexico and non-US regions, political question on Chinese OEMs

- US trade war scrambling import sources, threatening plants
- Seasonal market, with increasing port and carhaul imbalance
- **Watch next:** Chinese EV imports and further trade diversification

Both are tightly connected to the US but look set for more divergence

Chinese imports and electrification putting pressure on Brazil and key markets

- **80% YoY rise in China imports**

To 750k vehicles YTD, straining ports, compounds and inland transport

- **Rising EV & hybrid share**

New handling, charging, safety and workforce needs

- **Assembly localisation**

Trade policy could encourage more regional production



Logistics and trade policies have always been complex - but face rising geopolitical volatility

Capacity grows, but multimodal gaps remain

Colombia

Logistics providers investing in capacity as production, exports and sales rise

Peru

Transport providers adding capability as demand rises

Argentina

Market reforms easing import and trade restrictions

Brazil

Concentrated carrier market with capacity but risk at peaks and bottlenecks

Uruguay

Regions highest electrification at 56% BEV + PHEV, adding new logistics requirements



OEMs report more focus on control towers, network optimisation and total enterprise cost

Vehicle logistics adapting to export surge, declining sales and shipping needs

-20%

Drop in new-vehicle sales

Imports and international brands decline amid intense competition

+66%

Vehicle export growth

Exports offset weak home demand, inverting historical logistics flows

+103%

China-controlled ro-ro capacity

Grew from 28 ships in 2024 to 57 by June 2025 – and rising (*LConnect*)



Global ro-ro and PCTC capacity can barely keep up with China exports – some OEMs using containers

Assembly localisation looks set to follow the export boom

TODAY · RO-RO EXPORTS

China-built exports keep
domestic production high



Policy response +
local investment

TOMORROW · KIT & ASSEMBLY

SKD/CKD export and assembly,
supplier & logistics localisation



Investing in China export capacity is a must – but trade policy may accelerate local assembly

EV&SDV scale plus AI adoption set the pace for capacity, infrastructure and standards



- Handling
- Charging
- Safety



- Visibility
- Automation
- Learning



- Quality
- Standard
- Emissions

China will define FVL processes for EV and batteries in the region and globally

Asia Pacific: Strong growth meets China speed

India

Fast growth and infrastructure investment, but bottlenecks, fuel and cost constraints

Strait of Malacca

Shipping bottleneck and risk – investment in capacity and land bridge alternatives

Australia

China imports and trade response a key dimension

Japan & Korea

Export dominance under pressure – regional expansion and localisation

Southeast Asia

Strong growth and logistics potential, but regulatory and trade barriers lead to fragmentation

Growth in parts of Asia but with uneven supply chains, logistics bottlenecks, rising trade in China

Growth in Southeast Asia and India highlights gaps in rail, port and multimodal services



SOUTHEAST ASIA

Growth needs a network

Better land links and short sea but OEMs need integrated, multimodal networks at scale



INDIA

Rail on the rise

Vehicle rail has grown, but needs wider coverage and seamless handover to truck

Investment rising in India, Thailand, Vietnam and Malaysia but network coordination still lags

Global gateways and high-value import markets at a standstill

Safe haven ports under fire

Transshipment and Free Zone hubs like Jebel Ali in Dubai face disruption and rerouting

Energy supply & wealth hit

Attacks in Strait of Hormuz, Red Sea and Gulf hit fuel, shipping, imports and investment

Saudi potential and risk

Ceer and Lucis building regional production and exports; disruption could strain ramp-up



The Middle East and GCC have been rising export markets for Chinese vehicles

Changing import and export flows for production hubs in north and south wider Africa trade for new and used vehicles in flux

Morocco

More short-sea vehicle exports to Europe and closer supply-chain integration

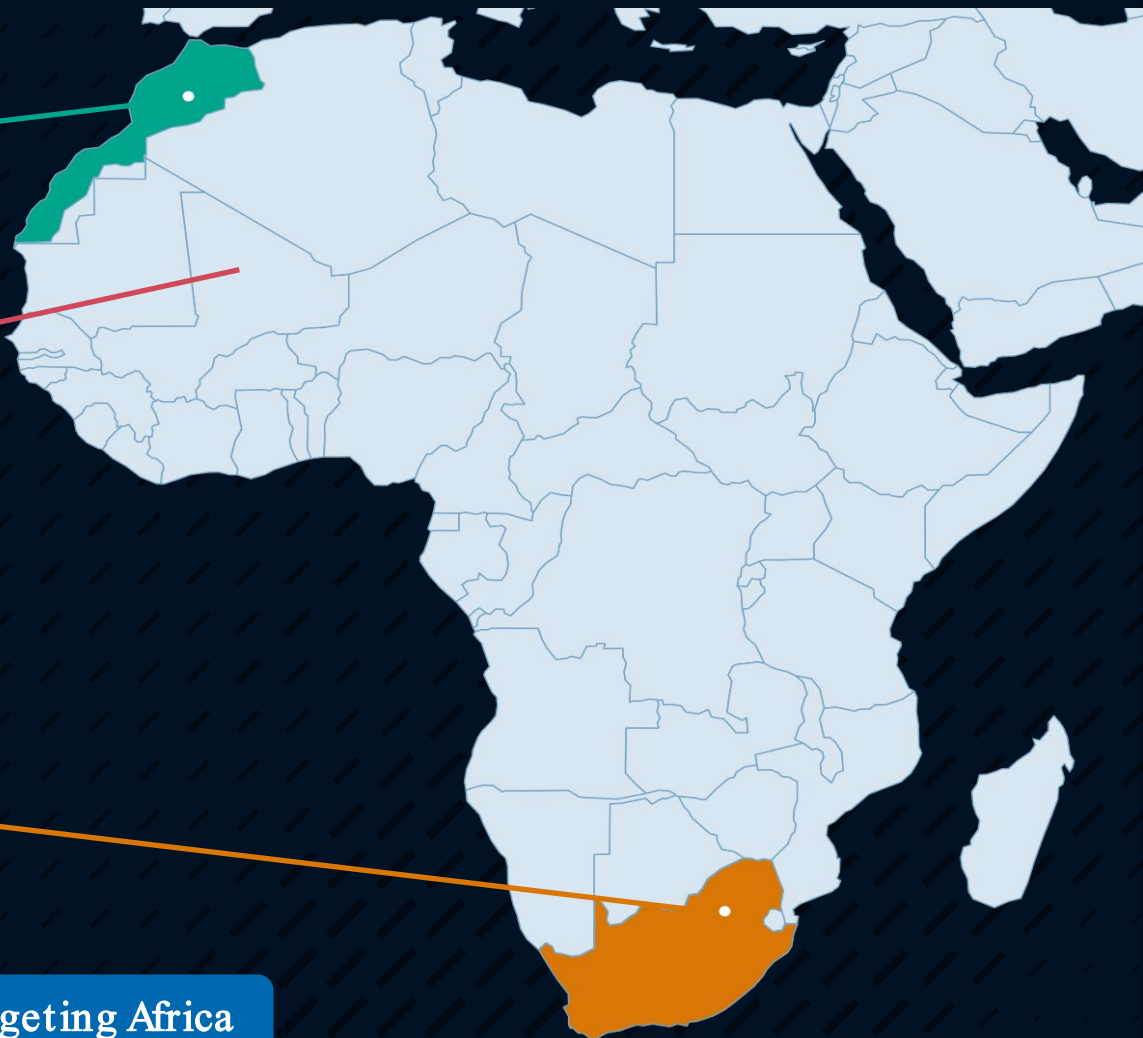
Sub-Saharan

Europe a key source of used vehicles, but flows diversifying; new-vehicle market small but growing

South Africa

US exports decline; Chinese sales and assembly rise, with possibilities for export to Europe (e.g. Chery)

Chinese vehicle imports and automotive investment increasingly targeting Africa



Europe: Winds of Change



Geopolitics fuel cost rise

Middle East and Russia-Ukraine driving higher energy, borrowing costs & inflation



Market & network shifts

Rising production in eastern Europe and the Iberian Peninsula



China exports & localisation

Imports strain ports; local assembly would reshape the map



Sustainability in focus

Climate disruption, regulation and emissions cuts drive strategy and cost



Digitalisation & AI

Visibility, network planning and process automation



Europe must update equipment and capacity – but also smart network integration & long-term partnerships

Automotive LOGISTICS & SUPPLY CHAIN

ASEAN

#ALSCASEAN

27-28 October 2026

Le Méridien,
Kuala Lumpur, Malaysia

Automotive LOGISTICS & SUPPLY CHAIN

MEXICO

#ALSCMEXICO

10-12 November 2026

Marquis Reforma Hotel,
Mexico City, Mexico

Automotive LOGISTICS & SUPPLY CHAIN

EUROPE

#ALSCEUROPE

16-18 March 2027

Kameha Grand Bonn,
Germany

Finished Vehicle LOGISTICS

NORTH AMERICA

#FVLNA

13-15 April 2027

Waterfront Beach Resort,
Huntington Beach, CA, USA

Automotive LOGISTICS & SUPPLY CHAIN

DIGITAL STRATEGIES
NORTH AMERICA

#ALSCDSNA

9 June 2027

Country Music Hall of Fame,
Nashville, TN, USA

Automotive LOGISTICS & SUPPLY CHAIN

UNITED KINGDOM

#ALSCUK

16-17 June 2027

Mercedes Benz World,
Weybridge, UK

NEW FOR 2027! NEW FOR 2027!

Finished Vehicle LOGISTICS

IMPORT EXPORT

#FVLIMPORTEXP

10-11 August 2027

Four Seasons Hotel,
Baltimore, MD, USA

Automotive LOGISTICS & SUPPLY CHAIN

GLOBAL

#ALSCGLOBAL

21-23 September 2027

Saint John's Resort,
Plymouth, MI, USA

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Thank you

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