

Update of the European FVL Cost Index for Q3 and Q4 2025 is now released. Developed through a longstanding partnership between ECG – the Association of European Vehicle Logistics – and PwC Austria, the Index provides regular and insightful updates to the FVL Industry.

In light of the current global fuel crisis with the recent sharp increase in oil and diesel prices and their potentially wide-ranging impact on the sector, an additional Q1 2026 update will follow at the end of April.

Brussels, 14 March 2026

The European Finished Vehicle Logistics (FVL) Cost Index for Q4 2025 stands at 151.1 which indicates an overall cost increase of 51.1 % from January 2019 to December 2025. Compared to the latest reported values for Q2 2025, three out of four segments showed an increase in Q3 and Q4 2025. For Q2 2025 the index stood at 152.8, hence, the index decreased by 1.7 index-points since the last index update. This development is greatly driven by the decrease of the FVL Sea Cost Index. For the four segments the following results were derived:

- **Logistics segment road:** The FVL Road Cost Index amounts to 129.4 for Q4 2025 which shows an overall cost increase of 29.4% between January 2019 and December 2025. For Q2 2025 the index stood at 128.8, hence, the index increased by 0.6 index-points since the last index update. This slight cost increase is mainly based on increasing labour costs as well as toll increases.
- **Logistics segment sea:** The FVL Sea Cost Index amounts to 199.9 for Q4 2025 which shows an overall cost increase of 99.9% between January 2019 and December 2025. For Q2 2025 the index stood at 208.8, hence, the index decreased by 8.9 index-points since the last index update. The decrease in the pure car and truck carrier (PCTC) vessel time charter rates, new building costs and bunker fuel drive this index development.
- **Logistics segment rail:** The FVL Rail Cost Index amounts to 133.5 for Q4 2025 which shows an overall cost increase of 33.5% between January 2019 and December 2025. For Q2 2025 the index stood at 132.7, hence, the index increased by 0.8 index-points since the last index update. This cost increase is mainly driven by further increases in asset costs as well as labour increases in some of the European countries.
- **Logistics segment compounds:** The FVL Compounds Cost Index amounts to 128.9 for Q4 2025 which shows an overall cost increase of 28.9% between January 2019 and December 2025. For Q2 2025 the index stood at 126.3, hence, the index increased by 2.6 index-points since the last index update. This development is primarily caused by further increases in labour and asset costs.

The full version of the updated figures for Q3 and Q4 2025 differentiated by segments and countries is available as an appendix to the study released in March 2023 [here](#).

In light of the current geopolitical developments and the resulting uncertainty across multiple cost dimensions we will be providing an additional update for Q1 2026 in six weeks' time, planned at the end of April. This supplementary update is intended to ensure that all stakeholders are kept fully informed as the broader implications of these developments continue to unfold. Should you have any questions on the FVL Cost Index or would like to be involved in the process of future index updates, please feel free to contact [PwC Austria](#) or the ECG secretariat.

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.**

About PwC

At PwC, our purpose is to build trust in society and solve important problems. We're a network of firms in 152 countries with nearly 328,000 people who are committed to delivering quality in assurance, advisory and tax services. Find out more and tell us what matters to you by visiting us at www.pwc.com

