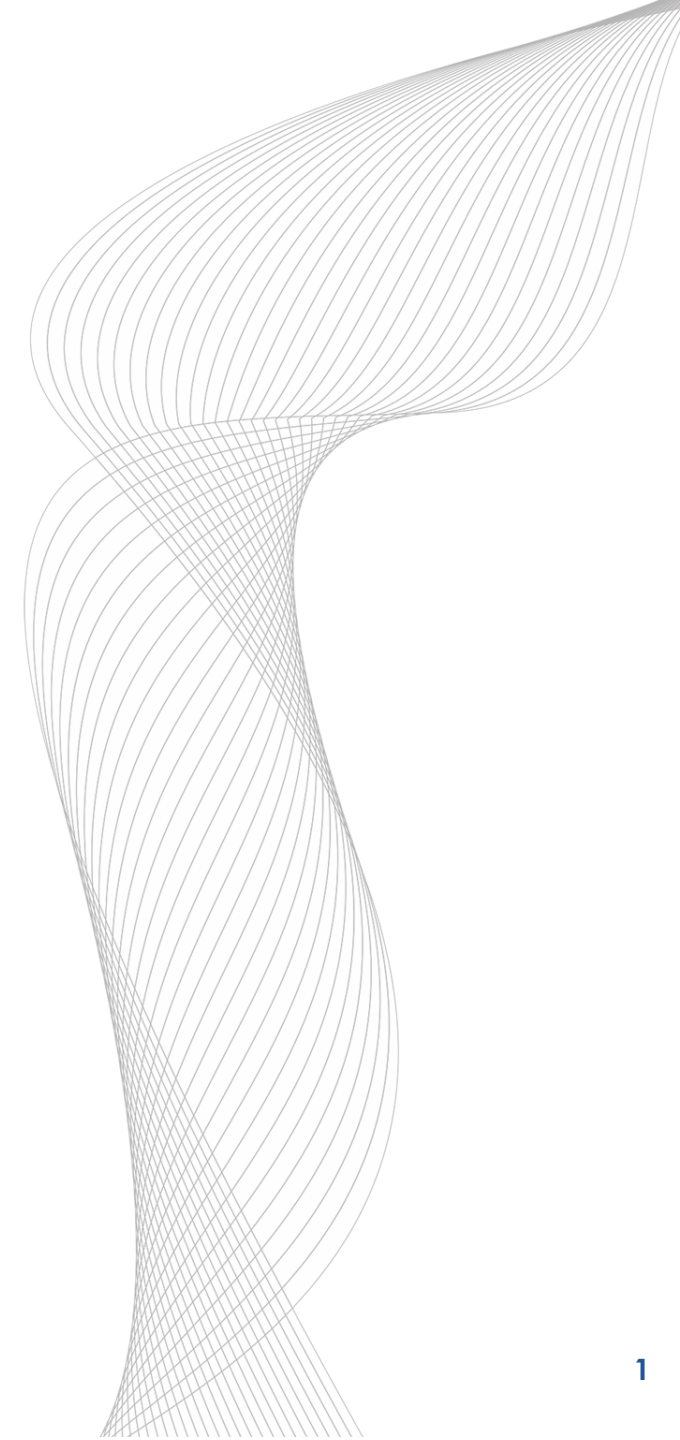


FVL industry survey

March 2026



Executive summary

- In a world of **tighter budgets**, the biggest challenge for the OEMs and LSPs are costs, as opposed to capacity two years ago, when the sector was just recovering from the « capacity crisis ».
- In 2026 the survey was launched and closed just before the war on Iran started, skyrocketing the energy prices. This is why this aspect is not that representative in the results given by LSPs.
- This is felt by the LSPs as a bigger pressure on transport rates and OEMs signal the pressure on their transport budgets, the two forming a logical pair.
- In such a situation the LSPs resent the most the lack of commitment to volumes which creates an uncertainty for them as far as their capacity management is concerned. OEMs feel the biggest impact in terms of congested compounds and maritime terminals, which impact their operations.

Executive summary

- In terms of **lead time**, the biggest challenges for LSPs are the short lead time requirements and penalties for breaching SLAs, which moreover represent a cost uncertainty as well and an additional burden. While OEMs highlight the lack of transparency of the delivery dates, which prevents from efficient planning, and resent the lack of proper track & trace in outbound logistics, which is more common in inbound.
- As far as the **operational challenges** are concerned, the LSPs highlight the long waiting times at (un)loading points and the multiple loading points, as well as the frequent changes. These all can disrupt the carefully orchestrated planning at LSP-side. OEMs, on the contrary, would like to have a better visibility of the vehicle movements and subcontractors being used by the LSP.

Executive summary

- Interesting outcome of the questionnaire is that both LSPs and OEMs esteem that the **vehicle weight and size** pose a challenge. This is understandable on the LSP-side as they have to load the vehicles to truck upper deck first position or need to cope with the fact that the railway wagon is not suited for that weight, etc. The fact that OEMs noted this as an issue as well might denote a conscientisation of this logistics constraint.
- In terms of regulatory issues LSPs noted the weekly rest time rules as having the biggest impact. Not a surprise as this comes with the truck being out of operations and the scarcity of suitable truck parking areas can also pose a challenge.

Executive summary

- Regarding the **environmental challenges**, the high uncertainty about the life cycle costs of CO₂ efficient transport solutions was highlighted. LSPs are not sure about the TCO of electric trucks or the availability of green fuels in shipping. The OEMs are concerned about the additional costs they have to pay for the CO₂ efficient solutions, and they feel there is a lack a transparency about fuel consumption and emissions.
- **Invoicing** touches the core issue of operations: cash-flow. The LSPs highlight the long payment times, which is not a surprise as this was already the biggest issue two years earlier. The proportion has grown since the last survey, showing a possible worsening of the payment situation in FVL. LSPs also highlight the compliance with various invoicing requirements as an issue.

Executive summary

- OEMs identify contractual rate management and invoice verification as major challenges, highlighting the high complexity of financial processes in Finished Vehicle Logistics. Rather than compliance itself, the difficulty lies in applying diverse and dynamic contractual conditions consistently across large volumes of transactions – creating a significant opportunity for automation and AI-driven validation.
- In terms of **human resources** recruiting is highlighted on both sides as a main challenge, but not much in the ‘very high impact’ segment. While for the LSPs recruiting has decreased its impact, for OEMs has grown it since the last survey in 2026, which might show an emerging talent/skills gap.

Executive summary

- The FVL industry is moderately **digitalized** – but not advanced as very few respondents report intelligent decision-making systems or AI-application.
- The most mature area is data exchange with customers, which is necessary for the daily operations, therefore the maturity is higher. The core logistics processes of fleet / compounds / route planning have tools implemented but these are not fully connected or optimized.
- AI maturity is consistently low across all functions, although it has grown since the last survey. This highlights the clear gap between digitalisation and true digital transformation.

Executive summary






- Even though data exchange was one of the most digitized areas, it is still the biggest priority for improvement and **investment**. This might be due to constant data quality issues, lack of real-time visibility and inconsistent formats across partners.
- The second biggest areas for investment is invoicing, as well as fleet management and route planning. All this together shows that the existing core processes should be further finetuned and the not new areas should be invested in.

Executive summary

- The Finished Vehicle Logistics sector shows a growing level of **digital strategic maturity**, with nearly half of companies reporting a high-impact digital strategy. Besides this, the middle group of companies, with a medium-impact digital strategy, is equally increasing. The outdated strategies are disappearing but the share of companies with no strategy is increasing, which is a concern as it highlights a digital gap between leaders and laggards.
- Regarding the **sums invested** in technology in FVL, companies are moving away from moderate investment levels and splitting into two groups: high investors (committed) and low investors (cautious or constrained).

FVL industry questionnaire in 2026

- Questionnaire open between: 23 January and 20 February 2026
- Responses received:
 - LSP: 50
 - OEMs: 22
- Colour code of the tables in the presentation:

0%-10%	
10.1%-20%	
20.1%-30%	
30.1%-40%	
above 40.1%	

Areas with challenges – for both LSPs and OEMs

- In 2024 capacity was 'leading' as the biggest business critical challenge, with cost being second.
- In 2026 the two swapped places: now it is **cost** the leading business critical challenge
- Regulatory requirements and HR pose bigger challenge in 2026 than two years earlier

	No challenges	Minor challenges	Major challenges	Business critical challenges
Cost	2,56%	15,38%	48,72%	33,33%
Capacity	5,13%	46,15%	25,64%	23,08%
Lead time	15,79%	31,58%	39,47%	13,16%
Operations	10,81%	43,24%	37,84%	8,11%
Technical development of the transported cars	15,79%	44,74%	34,21%	5,26%
Regulatory requirements	0,00%	33,33%	48,72%	17,95%
Environmental awareness	10,26%	51,28%	33,33%	5,13%
Invoicing and accounting	15,38%	58,97%	17,95%	7,69%
Human Resources	15,38%	33,33%	43,59%	7,69%

LSPs – Challenges related to cost

- In 2026 the challenge with the highest impact is the pressure on transport rates from the customers, with taxes and rising road tolls following.
- In 2024 the rising energy costs occupied the most 'prominent' place.
- NB: In 2026 the questionnaire was conducted and closed before the war started in Iran, impacting fossil fuel prices.

	No or very limited impact	Limited impact	High impact	Very high impact	I am not sure
Rising blue collar salaries	0,00%	40,00%	36,00%	24,00%	0,00%
Rising white collar salaries	8,00%	36,00%	44,00%	12,00%	0,00%
Rising real estate cost	0,00%	68,00%	28,00%	4,00%	0,00%
Rising interest rates	8,00%	60,00%	28,00%	0,00%	4,00%
Rising cost of equipment	0,00%	24,00%	44,00%	28,00%	4,00%
Rising energy costs	0,00%	24,00%	48,00%	24,00%	4,00%
Rising taxes	4,00%	24,00%	40,00%	32,00%	0,00%
Rising tolls and high uncertainty about future development	12,50%	8,33%	41,67%	37,50%	0,00%
Poor utilization	4,00%	36,00%	36,00%	24,00%	0,00%
Pressure on transport rates from customers	0,00%	4,00%	32,00%	52,00%	12,00%
Increased expectations of customers	8,00%	28,00%	32,00%	24,00%	8,00%

- Other comment: More requirements from customers when it comes to technological transparency: "We have to implement new systems which don't have an impact on the business itself. We do not observe any increase of volumes or new partnerships due to that, only additional requirements."

OEMs – Challenges related to cost

- In 2024 the biggest challenge for OEMs was the rising transport rates (69,57% rated as having a very high impact). Two years later, this is just the second challenge for OEMs, standing at 46,15%.
- In 2026 the biggest issue is the **pressure on transport budgets**, standing at 61,54%, while it was at 'just' 47,83% two years earlier. This signals just in what a narrow environment the LSPs have to evolve.
- A big change from 2024 is the disappearance of chartering own resources from the challenges with very high impact.

	No or very limited impact	Limited impact	High impact	Very high impact	I am not sure
Rising transport rates	0,00%	23,08%	30,77%	46,15%	0,00%
Rising salaries in transport department	0,00%	53,85%	30,77%	7,69%	7,69%
Chartering of dedicated resources	0,00%	46,15%	46,15%	7,69%	0,00%
Pressure on budget for transports	0,00%	0,00%	38,46%	61,54%	0,00%

- Two years ago, the OEMs were still preoccupied by the scarcity of resources they had to suffer from in 2023. The situation has since then stabilized and many additional capacity has arrived to the market.
- An OEM-respondent noted that legislation has a cost impact on them.

LSPs – Challenges related to capacity

- In 2024 the lack of commitment to volumes and the congested ports were seen as the challenges with the highest impact.
- In 2026 it is the **lack of volume commitment** that stands out the most, followed by congested ports and poor forecasting.

	No or very limited impact	Limited impact	High impact	Very high impact	I am not sure
Lack of workforce	8,00%	48,00%	32,00%	12,00%	0,00%
Lack of equipment	20,00%	56,00%	12,00%	8,00%	4,00%
Lack of storage space	12,00%	32,00%	32,00%	20,00%	4,00%
Poor outlook in planned customer demand (forecast)	4,00%	28,00%	40,00%	28,00%	0,00%
Lack of commitment to volumes	0,00%	16,00%	40,00%	44,00%	0,00%
Reduced productivity due to many drop off points	16,00%	28,00%	32,00%	20,00%	4,00%
Congested ports and compounds (waiting times unpredictable, special rules, etc.)	20,00%	8,00%	40,00%	24,00%	8,00%
Customers working directly with subcontractors	20,00%	36,00%	28,00%	12,00%	4,00%
Customers chartering dedicated resources	32,00%	24,00%	32,00%	12,00%	0,00%
Reduced capacity due to regulation (e.g. zero emission zones)	20,83%	41,67%	29,17%	8,33%	0,00%

OEMs – Challenges related to capacity

- In 2024 the list of very high impacts was led by the lack of transport capacities (standing at 60,87%), stemming from the capacity crisis in 2023. In 2026 this figure is at 23,08%, so there has been an improvement on the market in this regard.
- Two years later, the **storage capacity shortage** and the **congested transshipment points** continue to have a very high impact for the OEMs.

	No or very limited impact	Limited impact	High impact	Very high impact	I am not sure
Lack of transport capacities	0,00%	38,46%	38,46%	23,08%	0,00%
Lack of storage capacities	7,69%	30,77%	15,38%	46,15%	0,00%
Lack of commitment to volume	0,00%	23,08%	53,85%	23,08%	0,00%
Congested transshipment points (ports and compounds)	0,00%	23,08%	30,77%	46,15%	0,00%

LSPs – Challenges related to lead time

- In 2024 all these three points had mainly a limited impact.
- In 2026 short lead time requirements and penalties for breaching SLAs have a rather high impact.
- A respondent mentioned that quay congestion resulting in refused deliveries to ports have a very high impact.

	No or very limited impact	Limited impact	High impact	Very high impact	I am not sure
Short lead time requirements	20,00%	32,00%	32,00%	16,00%	0,00%
Lack of transparency concerning delivery dates	24,00%	28,00%	24,00%	24,00%	0,00%
Penalties for breaching agreed service level	25,00%	20,83%	37,50%	16,67%	0,00%

OEMs – Challenges related to lead time

- In 2026 the **lack of transparency of the delivery dates** has a very high impact in more cases (61,54%) than in 2024 (36,36%). Therefore, the visibility of the assets has worsened and/or the OEMs have a bigger focus on tracking the vehicles and obtaining a reliable ETA from the LSPs.
- This is confirmed by a comment a respondent left as far as their challenges concerned: "Adherence of the industry to **Track & Trace** like the Inbound industry ... FVL is really bad across the board."

	No or very limited impact	Limited impact	High impact	Very high impact	I am not sure
Long lead times	0,00%	16,67%	50,00%	33,33%	0,00%
Lack of transparency concerning delivery dates	0,00%	0,00%	38,46%	61,54%	0,00%

- The long lead times has also a very high impact for 33,33% of the respondents, while it stood at only 26,09% two years earlier.

LSPs – Challenges related to operations

- In 2024 **waiting times at collection and delivery** were noted as having high or very high impact. While this is still the case two years later, it is to a lesser extent.
- **Many unloading points and frequent changes** continue having a very high impact.
- The **issues at loading and unloading points** are highlighted as having a very high impact has also grown in the past two years.

	No or very limited impact	Limited impact	High impact	Very high impact	I am not sure
Many unloading points	16,00%	28,00%	36,00%	20,00%	0,00%
Frequent changes / cancellations	4,00%	40,00%	40,00%	16,00%	0,00%
Documentation requirements	28,00%	48,00%	24,00%	0,00%	0,00%
Requirements towards visibility and tracking of vehicle movements (ETA, loading and unloading information, real time information)	28,00%	24,00%	36,00%	12,00%	0,00%
Language barriers	36,00%	40,00%	20,00%	4,00%	0,00%
Too many and not reliable subcontractors	32,00%	40,00%	20,00%	4,00%	4,00%
Issues at loading and unloading points of customer	12,00%	32,00%	40,00%	16,00%	0,00%
Waiting times at collection and delivery	20,00%	20,00%	32,00%	28,00%	0,00%
Documentation and clarification of damages	12,00%	40,00%	40,00%	8,00%	0,00%

OEMs – Challenges related to operations

- The **lack of transparency of the vehicle movements** and that of the **subcontractors** were already the issues having the highest impact in 2024 (standing respectively at 30,43% and 39,13%).
- The appreciation has sensibly worsened since then: 61,51% of the respondents esteem that lack of visibility of the vehicle movements has a very high impact, while this is at 46,15% for the subcontractors.

	No or very limited impact	Limited impact	High impact	Very high impact	I am not sure
Lack of visibility and transparency on vehicle movements (ETA, statuses)	0,00%	23,08%	7,69%	61,54%	7,69%
Lack of transparency if subcontractors are involved	0,00%	30,77%	23,08%	46,15%	0,00%
Poor information about planned delivery dates	0,00%	7,69%	53,85%	38,46%	0,00%
Working with too many suppliers	15,38%	30,77%	46,15%	7,69%	0,00%
Language barriers	23,08%	53,85%	23,08%	0,00%	0,00%
Unannounced collections and deliveries	15,38%	30,77%	30,77%	15,38%	7,69%
Documentation and clarification of damages	0,00%	61,54%	23,08%	15,38%	0,00%

- An OEM-respondent left a comment in the survey that delays associated with uncontrollable events, particularly weather cause concern within operations.

LSPs – Challenges related to the technical development of cars

- The **size and weight of vehicles** continue being an issue of very high impact (24% in 2026, 25,53% in 2024)
- This is an issue, as some assets are not suited for the transport of the bigger and heavier cars, so investment in new assets would be needed, especially in rail, but the investment costs are very difficult to 'pass on' to the clients.
- The second biggest issue is the increasing complexity of vehicles (12% in 2026, 6,38% in 2024)

	No or very limited impact	Limited impact	High impact	Very high impact	I am not sure
Safety concerns of Electric Vehicles	20,00%	40,00%	32,00%	8,00%	0,00%
Digitisation of vehicles	20,00%	48,00%	24,00%	8,00%	0,00%
Size and weight of vehicles	12,00%	20,00%	44,00%	24,00%	0,00%
Increasing complexity of handling cars	8,00%	48,00%	32,00%	12,00%	0,00%

- *Comment: "Payloads reducing due to weight/size. Very high impact when OEM refuses a co-efficient style rate schedule."*

OEMs – Challenges related to the technical development of cars

- The **size and weight of the vehicles** is not an issue only for the LSPs, but also for the OEMs. This is esteemed having a very high impact in 23,08% of the cases, while this only stood at 17,39 two years ago.
- It might stem from the understanding at OEM-side that the heavier, wider their vehicles get, they can pose some logistics constraints: some older and still running trucks or wagons are not capable of their transport.

	No or very limited impact	Limited impact	High impact	Very high impact	I am not sure
Lack of services provided for Electric Vehicles	0,00%	53,85%	30,77%	7,69%	7,69%
Size and weight of vehicles	0,00%	15,38%	61,54%	23,08%	0,00%

LSPs – Challenges related to regulatory issues

- In 2024 already the **Weights & Dimensions legislation** was the biggest challenge (20%), apart from the Mobility package (which is in place since many years, therefore we did not ask about it in 2026). In 2026, 28% of respondents assessed the Weights & Dimensions restrictions as having a very high impact.
- In 2026 the second biggest issue is the **weekly rest time rules** (28%, as opposed to 11,36% in 2024) as failing to comply with the complex rules can lead to fines and legal action.

	No or very limited impact	Limited impact	High impact	Very high impact	I am not sure
Documentation and control of driving and rest times	12,00%	40,00%	24,00%	20,00%	4,00%
Cabotage regulations	20,00%	12,00%	40,00%	16,00%	12,00%
Weight and dimension restrictions	16,00%	12,00%	40,00%	28,00%	4,00%
Requirements for mandatory weekly rest times and resulting fines	20,00%	24,00%	24,00%	28,00%	4,00%

LSPs – Challenges related to environmental awareness

- In 2026 the newly added item on 'high uncertainty about the life cycle costs of CO₂ efficient transport solutions' had the highest impact (40%).
 - For trucking this stems from fluctuating technology costs, evolving infrastructure and varying operational conditions.
 - For shipping this originates in immature technology markets, volatile fuel prices and evolving global regulatory frameworks.

	No or very limited impact	Limited impact	High impact	Very high impact	I am not sure
Reporting on fuel and CO ₂ emissions	16,00%	36,00%	36,00%	12,00%	0,00%
Pressure to invest in green assets	16,00%	28,00%	32,00%	24,00%	0,00%
High uncertainty about life cycle costs of CO ₂ efficient transport solutions (e.g. e-Trucks)	12,00%	12,00%	32,00%	40,00%	4,00%

- The pressure to invest in green assets (24%) is the second preoccupation in 2026. It stood at 21,28% two years before.

OEMs – Challenges related to environmental awareness

- Two years ago we only asked about the transparency about fuel and CO₂ emissions, which had rather a limited impact back then on the OEMs. This is more in the ‘high’ segment in 2026.
- The new question concerned the additional costs that the OEMs pay for the greener assets: they consider this to have a high impact on them (61,54% of the respondents).
- This shows a limited willingness to support greener asset investments/deployment in a world with biggest budget constraints.

	No or very limited impact	Limited impact	High impact	Very high impact	I am not sure
Transparency about fuel and CO ₂ emissions	0,00%	7,69%	84,62%	7,69%	0,00%
Additional costs for more CO ₂ efficient transport solutions	0,00%	0,00%	61,54%	38,46%	0,00%

LSPs – Challenges related to invoicing and accounting

- Already in 2024 **the long payment times** were pinpointed as having a very high impact (25,53%), while 40,43% of the respondents noted a high impact.
- In 2026, these shares have grown even further (40% - very high impact; 36% - high impact), denoting a slight worsening of the payment situation in the FVL sector.
- In 2026 LSPs highlighted the **compliance with the various invoicing requirements** as second biggest challenge (24%), which has grown from two years ago, when it stood at 6,38%.

	No or very limited impact	Limited impact	High impact	Very high impact	I am not sure
Management of contractual rates	28,00%	24,00%	32,00%	16,00%	0,00%
Compliance to different invoicing requirements	16,00%	24,00%	36,00%	24,00%	0,00%
Manual processes related to documentation and verification	24,00%	24,00%	36,00%	16,00%	0,00%
Payment time (too long)	12,00%	12,00%	36,00%	40,00%	0,00%
Correct cost and revenue allocation (according to routes and customers)	16,00%	28,00%	36,00%	20,00%	0,00%

OEMs – Challenges related to invoicing and accounting

- In 2024 all these elements lied in the 'limited impact' segment for the OEMs, while in 2026 the **contractual rate management** clearly stands out as having a high impact (53,85%).
- This showcases how complex the FVL pricing is, based on routes, fuel and other adjustments, LSPs, countries of operation and modes of transport and other services, like storage or PDI.

	No or very limited impact	Limited impact	High impact	Very high impact	I am not sure
Management of contractual rates	0,00%	30,77%	53,85%	7,69%	7,69%
Compliance of invoices with invoicing standard	0,00%	46,15%	30,77%	7,69%	15,38%
Invoice verification process	0,00%	38,46%	30,77%	23,08%	7,69%

- Both the **invoice verification process** and the **compliance of invoices** with the OEM standard increased their impact on OEM operations.

LSPs – Challenges related to human resources

- LSPs highlighted **recruiting** as having a very high impact (27,66%) in 2024. Two years later it only has a very high impact for 16% of the respondents but 40% note that this is a high impact item.
- Besides this, **productivity** and **qualification management** stand out in both years.

LSPs	No or very limited impact	Limited impact	High impact	Very high impact	I am not sure
Recruiting	16,00%	28,00%	40,00%	16,00%	0,00%
Absence management	12,50%	45,83%	29,17%	12,50%	0,00%
Productivity management	4,00%	44,00%	36,00%	16,00%	0,00%
Qualification management	12,00%	40,00%	32,00%	16,00%	0,00%
Administrative effort around employing foreign personnel	24,00%	40,00%	20,00%	12,00%	4,00%

OEMs – Challenges related to human resources

- In 2026 both **recruiting** and **qualification management** have a higher share of 'very high impact' than two years earlier (when they stood respectively at 13,04% and 8,7%).
- This trend shows that there might be bigger difficulties in attracting new talent to FVL and to ensure proper qualification.

	No or very limited impact	Limited impact	High impact	Very high impact	I am not sure
Recruiting in the area of FVL	0,00%	46,15%	23,08%	30,77%	0,00%
Qualification management	0,00%	53,85%	30,77%	15,38%	0,00%

LSPs – Services most impacted by the challenges

- **Road transport** is the most impacted service in both years (28,26% in 2024; **40% in 2026**), followed by compounds and shipping.
- A bigger percentage of the respondents (**17,39%** in 2026, as opposed to 7,14% in 2024) considers **rail transport** as being heavily impacted.

	Not impacted by challenges	Limited impact of the challenges	High impact of the challenges	Very high impact of the challenges	N/A
Road Transport	8,00%	8,00%	32,00%	40,00%	12,00%
Train Transport	4,35%	13,04%	8,70%	17,39%	56,52%
Ship Transport	4,35%	13,04%	8,70%	21,74%	52,17%
Compound Storage and Handling	4,35%	13,04%	39,13%	26,09%	17,39%
Additional services on cars (e.g. car evaluation, wrap application, mechanical work)	4,35%	34,78%	26,09%	8,70%	26,09%

OEMs – Services most impacted by the challenges

- In 2026, just like two years earlier, the **road** and **ship transport** stood out as having the highest impact on OEM operations. But the proportions have grown and the ship transport is leading this time at 61,54% (up from 43,48%).
- The **rail transport** stands at approx. the same proportion as in 2024, while **compound and storage** has seen its impact appreciation worsen (from 26,09% to 53,85%)

	Not impacted by challenges	Limited impact of the challenges	High impact of the challenges	Very high impact of the challenges	N/A
Road Transport	0,00%	7,69%	46,15%	46,15%	0,00%
Train Transport	7,69%	7,69%	30,77%	30,77%	23,08%
Ship Transport	0,00%	7,69%	61,54%	23,08%	7,69%
Compound storage and handling	7,69%	7,69%	53,85%	30,77%	0,00%
Additional services on cars (car evaluation, wrap application, mechanical work)	7,69%	46,15%	38,46%	0,00%	7,69%

Level of digitalisation

For both LSPs and OEMs

Level of digitalisation

- Like in 2024, in 2026 it is the **data exchange** and the **settlement process** that stand out as having the majority of processes digitised. These are the two segments that lead in terms of machine learning and AI as well, showing their importance.
- Compared to 2024 more companies note that they apply **machine learning and AI** than at the previous survey. It stood at around 1,5% in 2024, while in 2026 the shares have sensibly grown.

	All processes offline	Some processes digitized but function specific isolated systems	Majority of processes digitized and integrated with interfacing functions and companies	Intelligent decision-making systems	Machine learning and AI	N/A
Data exchange with customers and partners (Orders / Statuses / Movements / Services)	2,86%	20,00%	57,14%	5,71%	8,57%	5,71%
Management of your own fleet	5,71%	17,14%	42,86%	5,71%	2,86%	25,71%
Management of your own compounds	2,86%	11,43%	37,14%	17,14%	2,86%	28,57%
Management of own refurbishment operations	5,71%	25,71%	28,57%	0,00%	5,71%	34,29%
Disposition and route planning	8,57%	31,43%	28,57%	17,14%	5,71%	8,57%
Procurement	5,88%	44,12%	35,29%	2,94%	2,94%	8,82%
Settlement process (invoicing, accounting)	2,86%	25,71%	54,29%	2,86%	8,57%	5,71%
Recruiting	17,14%	51,43%	11,43%	0,00%	2,86%	17,14%
People management and human resources	5,71%	54,29%	22,86%	0,00%	2,86%	14,29%

- Intelligent decision-making systems** are applied mostly in compound management and route planning. This latter now stands at 17,14%, while two year earlier it was already at 15,15%.

Investment areas

- **Data exchange** stands out in 2026, just like in 2024, but the proportion of respondents decreased from 71,21% to 62,86%.
- The second area for investments in 2026 is the **settlement process**, while it stood just on the 5th place two years earlier. In a world of tighter budgets additional tools are needed to manage cash-flow.
- **route planning** stood at the second place in 2024 at 48,48%, while it decreased to the third position in 2026 to 42,86% (in a tie with own fleet management).
- **Management of own fleet** also stands out in 2026 with 42,86%, while it was just at 37,88% two years earlier.

Data exchange with customers and partners (Orders / Statuses / Movements / Services)	62,86%
Management of your own fleet	42,86%
Management of your own compounds	37,14%
Management of own refurbishment operations	8,57%
Disposition and route planning	42,86%
Procurement	25,71%
Settlement process (invoicing, accounting)	45,71%
Recruiting	17,14%
People management and human resources	28,57%
Other (please specify)	5,71%



- None
- Supply chain monitoring and warning solutions

Level of digitalisation of FVL

- The digital strategies developed by the LSPs and OEMs have a higher impact in 2026 than in 2024 which shows more experience in this matter.
- On the other hand, the proportion of respondents who note not having a company digital strategy has grown since two years earlier.

Answer Choices	Responses 2024	Responses 2026
Our digital strategy has high impact (is thoroughly executed and constantly reviewed to reflect business challenges, new technologies and the development of digital capabilities of our organization)	43.94%	48,57%
Our digital strategy has medium impact (is updated in irregular intervals and is executed in parts)	31.82%	34,29%
We have a digital strategy, but it is outdated and lacks real impact	16.67%	2,86%
We don't have a digital strategy	9.09%	14,29%

Investment in FVL tech in € per year

- The proportion of companies which invest between €50K and €250K has decreased by 10 percentage points.
- The proportion of companies investing less than €50K per year has grown with approx. 6 percentage points, and the ones investing more than €250K has grown by 4 percentage points.

Answer Choices	Responses 2024	Responses 2026
<50k	13,43%	19,44%
50k-250k	29,85%	19,44%
>250k	34,33%	38,89%
I have no Idea	22,39%	22,22%

Use of Artificial Intelligence

For both LSPs and OEMs

Anticipated timeline for launching first AI project

- AI is not emerging anymore in this sector – it's already widely adopted by nearly half of the companies.
- Adoption within 6 months: 14.29%; in 6–12 months: 5.71%, so the total launching within 1 year is around 20%. This shows a second wave of adopters is imminent.
- Implication: Many companies are actively preparing AI projects now, therefore rapid acceleration in adoption over the next year is expected.

AI is already currently in use	45,71%
Within 6 months	14,29%
6–12 months	5,71%
1–2 years	17,14%
2–3 years	0,00%
No current plans	17,14%

- The group with no plans represents approx. 1 in 6 companies – this is a notable proportion. This might stem from different reasons: Lack of internal expertise; Unclear ROI; Organizational resistance; Smaller players with fewer resources

Business areas are targeted for AI integration in the next 1–3 years

- Supply chain and logistics dominates, when it comes to areas of use for AI. This tells us that AI is being seen primarily as an operational optimization tool. This confirms that AI is seen as a key lever for operational excellence, especially critical in a sector with thin margins, high complexity and volatile demand.
- IT being the second most important business area shows that AI is not being treated as isolated pilots, but as enterprise-level transformation. IT teams will play a central strategic role, not just support.
- The application in areas, like customer service, production/operations and sales & marketing tells us that companies are starting to apply AI across the value chain, not just in logistics.

Sales and marketing	43,75%
Customer service	46,88%
Supply chain/logistics	75,00%
Production/operations	46,88%
HR	25,00%
Finance	37,50%
IT	62,50%
Other (please specify)	9,38%



- None
- All
- Vehicle inspection

Main obstacles anticipated in the AI integration journey

- Uncertain return on investment is the main obstacle highlighted by respondents. This is the most critical insight as this means that companies are not fully convinced this technology. It is seen as promising but not always predictable. This shows that the main barrier is the lack of confidence in the value.
- AI is only as good as the data behind it. Not surprising that the second barrier is data quality. This might signal fragmented systems, inconsistent or incomplete data or lack of standardization across logistics networks.
- The budget, the lack of talent and the legacy systems are classic transformation barriers.

Lack of AI talent	38,24%
Limited budget	41,18%
Data quality issues	50,00%
Legacy IT systems	35,29%
Privacy or ethical concerns	11,76%
Uncertain ROI	52,94%
Organizational resistance	20,59%
Regulatory barriers	5,88%
Other (please specify)	2,94%



« A lot of things have to be improved before use for "serious" things like invoicing etc. »

Any questions or comments?

szilvi.kiss@ecgassociation.eu