

Genova, October 5, 2026 Ship2Shore AWARDS

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ON LINE MAGAZINE OF MARITIME AND TRANSPORT ECONOMICS

Editor in chief: Angelo Scorza

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LOGISTICS

Vehicle logistics faces a once-in-a-generation shift

At ECG’s General Assembly in Istanbul, members warned that rising vehicle flows from Asia are putting European ports under pressure, while the shortage of car transporter drivers continues to worsen

JUNE 8, 2026 AT 11:25 AM

More than seven months have passed since ECG last gathered for its General Assembly, but for Europe’s finished-vehicle logistics sector it feels as though an era has ended.

The industry is being reshaped by forces that would have seemed difficult to imagine only a few years ago: the rapid rise of Chinese carmakers, shifting trade routes, geopolitical instability and mounting pressure on transport capacity across Europe.





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Chinese automotive brands in Europe. According to forecasts presented by Justin Cox, Director of Global Production Forecast, during ECG’s General Assembly in Istanbul, Chinese manufacturers are expected to increase their share of the European market, excluding Russia, from 5.7% in 2025 to 12.2% by 2030.



For vehicle logistics operators, the implications are profound. A growing share of the cars sold in Europe will arrive by sea from Asia before continuing their journey by truck or rail to dealerships across the continent.

“There is optimism, but we are facing one of the biggest transformations our industry has ever seen,” newly elected ECG President Mark Hindley told delegates.

While China’s growing influence represents a long-term structural shift, the repercussions of the latest tensions in the Middle East and Iran are being felt much more immediately. The uncertainty has further complicated supply chains and altered established trade patterns, even if the industry hopes the disruption will prove temporary.

The changes are already visible in the ranking of the world's busiest vehicle terminals. Data presented by Namrita Chow, ECG’s Business Intelligence Manager, showed several ports recording extraordinary





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Port name	2025	TTD 2025	Y/Y	Port name	2025	TTD 2025	Y/Y
Busan New Port	15	72	380.00	Trieste	51	68	33.33
Civitavecchia	76	182	139.47	Hambantota	121	160	32.23
Alexandria (EG)	43	70	62.79	Piraeus	60	79	31.67
Tunis	45	73	62.22	Yantai Pt	91	117	28.57
Dar es Salaam	54	83	53.70	Salerno	187	238	27.27
Jeddah	46	69	50.00	Manta	54	68	25.93
Casablanca	51	70	37.25	Cartagena (CO)	66	83	25.76
Taicang Pt	97	131	35.05	Sakaisenboku	81	101	24.69
Ningbo	63	85	34.92	Durban	132	164	24.24
Hitachinaka	87	116	33.33	Barcelona	264	325	23.11
				Dalian	93	113	21.51
				Portland	65	78	20.00
				Kawasaki	99	117	18.18
				Tacoma	91	107	17.58
				Royal Portbury Dock (Bristol)	111	130	17.12
				Masan	193	224	16.06
				Kobe	127	147	15.75
				Tincan/Lagos	60	68	13.33
				Brisbane	132	149	12.88
				Palermo	98	110	12.24

Dei primi 100 porti al mondo per volumi ro ro, questi sono quelli che hanno fatto segnare il maggior aumento percentuale di traffico



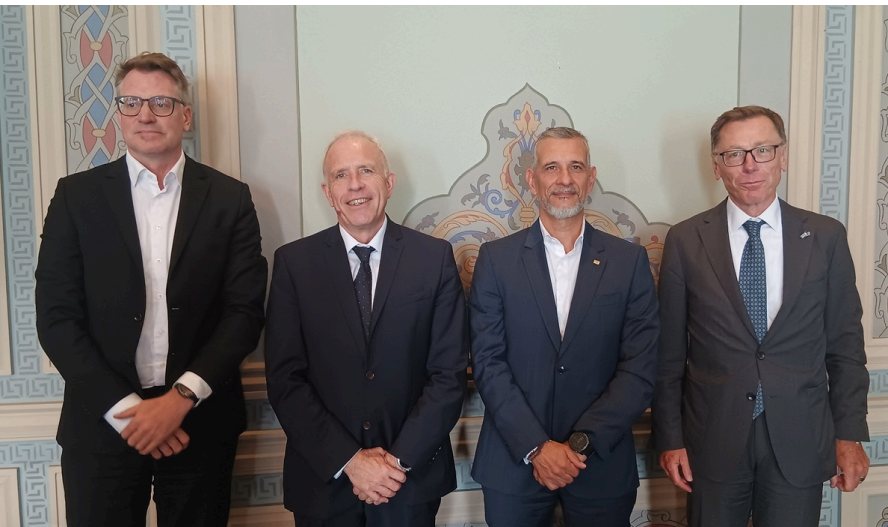
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South Korea’s Busan led the table, with vehicle volumes increasing almost fivefold. Italy’s Civitavecchia ranked second, posting an impressive 139.47% increase.

Other Italian gateways also recorded strong performances. Trieste handled more than a third more vehicles than a year earlier, while Salerno and Palermo reported growth of 27.27% and 12.24% respectively.

Another development drawing increasing attention is the surge in Chinese used-car exports. Figures presented during the assembly showed exports rising from 436,000 vehicles in 2024, itself a 46.5% increase on the previous year, to 600,000 units last year, a further jump of 37.6%.

Even more striking are China’s overall export figures. During the first quarter of 2026 alone, the country exported 2.23 million vehicles worldwide, up 57% year-on-year.



Although a large proportion of those vehicles are destined for Russia, growing volumes are finding their way to Italy and other European markets. For logistics providers, adapting to these new flows is no longer optional but a strategic necessity.

At the same time, vehicle exports from EU member states have continued to edge upwards, rising from 4.89 million units in 2024 to 4.97 million last year. Yet Europe’s



For ECG members, the market is increasingly “volatile”

The changing geography of automotive trade is clearly reflected in the association’s own survey results: 46% of members said market volatility, driven by shifting vehicle flows and wider trade disruption, would be the industry’s biggest challenge over the next three years. By comparison, 29% identified



political uncertainty as the main concern.

Sustainability remains another major pressure point. Asked about the biggest barriers to greener vehicle logistics, 62% of ECG members pointed to the cost of investment, while 18% cited emissions measurement and reporting.

Technology is also moving rapidly up the agenda. For 53% of members, artificial intelligence is expected to have the greatest impact on the sector, while 20% pointed to digital platforms.

“The rapid growth in electric vehicle volumes presents significant opportunities, but the long-term success of the industry will depend on balancing innovation, competitiveness, energy security and geopolitical risk,” Hindley said.

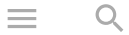
“Challenges such as rising fuel costs, manufacturing capacity constraints, evolving OEM

dynamics, and the urgent need for sustainability and skilled personnel require us to be more adaptable and innovative than ever before.”

Capacity is already becoming one of the most immediate consequences of this changing market. Vehicle imports into the EU increased by around 450,000 units between 2024 and 2025, adding further strain to European port infrastructure.

“This has created significant pressure across European port facilities,” Hindley added.

One of the most stubborn constraints, however, remains on the road



Outgoing ECG President Wolfgang Göbel, who was named Honorary President after 24 years with the association, including 10 as president, once again drew attention to the chronic shortage of car transporter drivers.

The warning was echoed by Giacomo Rolfo, Sales Manager at Rolfo S.p.A., the Italian manufacturer of vehicle transport equipment.

“Things are getting worse,” he told *Ship2Shore*. “One statistic tells the story: for every seven drivers who retire or leave the profession, only one new driver enters the industry. By 2032, the global vehicle logistics sector is expected to face a shortage of millions of transporter drivers. In Europe, pay is attractive, with salaries starting at around €3,000 per month, yet companies still struggle to recruit.”

For Rolfo, 2025 was nevertheless a positive year.

“We achieved strong results in both production volumes and profitability,” he said. “I am less optimistic about 2026. The first four months started well, but from May onwards the automotive market weakened significantly, partly because of the Middle East crisis, which has affected the entire supply chain, starting with transport operators, through higher fuel costs.”

The search for drivers is also becoming increasingly global.

“Our customers are now looking as far afield as Peru and the Philippines to recruit drivers,” Rolfo added.

On the product side, the company is investing heavily in equipment for electric vehicle transport.

“For one customer, we recently presented in Poland the first electric Scania transporter fitted with our transport equipment. At the Hannover trade fair, from September 15 to 20, we will unveil our new enclosed transporter for so-called confidential transport. We will redesign the box, keeping the same external dimensions while increasing the internal space. The semi-trailer will be fully electric and equipped with remote control.”

ECG is also trying to address the skills shortage through training, even if the scale of the problem makes the road ahead difficult.

“We have developed a range of solutions to tackle the issue,” Hindley said. “The ECG Academy is part of that strategy. Through training, we are helping to prepare the drivers of tomorrow, while also making the profession more attractive to both younger and older workers.”

The Academy, together with its Certificate in Automobile Logistics Management, was created in response to growing demand for specialist training for junior and middle managers working in finished-vehicle logistics.



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knowledge and analytical skills needed to maximise their potential and become proficient in managing complex global vehicle logistics networks.

Each year, the course welcomes between 35 and 43 participants.

“It is a unique certificate of excellence and, to the best of our knowledge, the only formal qualification in vehicle logistics available anywhere in the world,” said Christian Fuss, Board Member and Marketing Director at ProAct Global Solutions, the Wales-headquartered technology company with offices in Hamburg and Atlanta.

The course lasts around 24 days and is divided into five modules held at different locations across Europe.

“Our business is performing well. ProAct provides software solutions for the finished-vehicle logistics market in several countries around the world,” Fuss said. “Our customers include both car manufacturers and logistics companies. More and more OEMs are looking for software solutions to manage vehicle movements.”

For Fuss, the challenge is not the availability of technology, but the industry’s ability to understand and adopt it quickly enough.

“In many ways, technology is already all around us. We just need to help logistics companies understand how it can support their business. For us, the difficulty lies in creating a single technology that can support each company across all its activities, also because companies themselves often take a long time to understand what they actually need. The result is that while they are still thinking about it, technology moves on and many of them miss the train.”

Fuss also offered a broader reflection that applies well beyond the vehicle logistics sector.

“In difficult times, companies often postpone technology investments. I believe those are precisely the moments when businesses should invest for the future and implement new technologies.”

Since 2019, ProAct International has supported the ECG Academy through lectures and by sponsoring a new Digital Mindset Award. Students who choose a digital topic for their dissertation are automatically entered for the prize. The results of this and the other awards are announced immediately after the graduation ceremony.



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The global car carrier, with the support of GATX and Adampol, loaded its first own GLOVIS wagon set, marking the official launch of rail operations using proprietary wagon assets

JANUARY 20, 2026 AT 10:55 AM





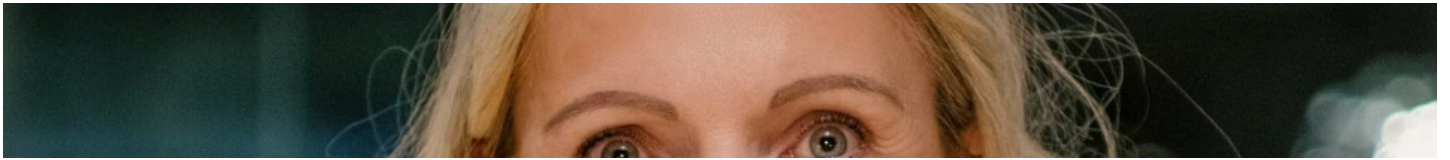
LOGISTICS

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AUGUST 1, 2025 AT 12:45 PM





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JANUARY 26, 2026 AT 05:15 PM

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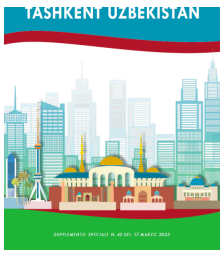
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