Global Vehicle Logistics at a Crossroads: Summary of the ECG General Assembly & Spring Congress 2026 in Istanbul

by Przemek Oplocki

The ECG General Assembly & Spring Congress 2026 took place on June 4-5 at the Çırağan Palace Kempinski, a former sultan's palace. The Polish accent in the name points to the roots of the hotel chain, which originates from the Polish-Jewish-German entrepreneur Berthold Kempinski.


Photos: ECG




Let us leave the past behind, however, and return to the present. This year's event went down in the association's history as a record-breaking one in terms of attendance. The scale of the General Assembly itself matched that of major congresses from previous years, clearly confirming the growing importance of Finished Vehicle Logistics (FVL) in the face of global market turmoil.

Participants in the event received detailed reports on the association's activities, balance sheets of the working groups, and key industry initiatives. Experts associated with the organization's structures unanimously highlighted one phenomenon: a clear return and stronger engagement of Original Equipment Manufacturers (OEMs) in direct dialogue with logistics operators.

The experiences of recent crises have made manufacturers realize that even the most optimized internal logistics network can be easily paralyzed by external factors, such as bottlenecks in ports. As a result, OEMs are now much more willing to seek long-term, partner-based cooperation that extends beyond their previous, closed operational activities.

The General Assembly saw pivotal personnel changes at the highest levels of the organization's leadership. After a decade at the helm, the current President, Wolfgang Göbel (MOSOLF), stepped down from his position. He has been succeeded by Mark Hindley (BCA Automotive), the former Vice-President of ECG. Marco Duato Mollera (Suardiaz Shipping Lines) was elected as the new Vice-President. Board members were also elected and re-elected for a one-year term, welcoming three new members to their ranks: Jürgen Vanhove (ICO), Axel Krichel (BLG), and Tobias Spannbauer (MOSOLF). Marc Adriansens and Krzysztof Szeligowski left the board.

In his maiden speech as the new President, Mark Hindley emphasized that the industry is facing a period of massive transformation driven by the electric vehicle market, rising fuel costs, and geopolitics. However, he stressed that these challenges must be turned into new opportunities for integration and growth.

The first day, filled with discussions, culminated in a formal gala dinner. It was a farewell to the outgoing President, Wolfgang Göbel, who served on the ECG board for 24 years, including 7 years as Vice-President and the last 10 years as President of the organization. In recognition of his monumental contributions to the development of the Finished Vehicle Logistics (FVL) sector in Europe, the General Assembly granted him the prestigious title of Honorary President, which will allow for his continued involvement in selected strategic projects of the association.

Following tradition, diplomas were awarded to the graduates of the prestigious ECG Academy. This year's class proved to be historic, with a record number of 42 participants graduating from the academy—a great omen for the development of managerial talent in European automotive logistics.

In keeping with tradition, on the second day of the conference, a session was held focusing on forecasts for the automotive market; from the window, there was a view of the Bosphorus Strait, with ships constantly passing through it: from the Sea of Marmara to the Black Sea, and vice versa.

As usual, we begin with a presentation by Justin Cox (GlobalData), who outlined forecasts for the global light vehicle (LV) market in the face of an increasingly complex situation and a slowdown in GDP growth worldwide, including in the United States, the eurozone and China. Due to the escalation of the conflict in the Middle East and the crisis in Iran, baseline global sales forecasts for 2026 were reduced by approximately 2 million units between February and April 2026. This adjustment assumes that an energy market price shock will persist into the second quarter of the year, negatively impacting Europe's already weak economic






outlook. Additionally, a slowdown in the growth momentum of the global plug-in electric vehicle market was observed at the beginning of 2026.

A moment later, Cengiz Eroldu (representing the Automotive Manufacturers Association – OSD) discusses the position and performance of the Turkish automotive industry in 2025 and its strategic integration with the European Union. The Turkish automotive sector has an annual capacity of 2.2 million vehicles, with 2025 production reaching 1.42 million units and exports totaling 1.06 million units. The country is the third-largest export market for the European Union, and close cooperation (nearshoring), along with the development of the so-called Middle Corridor, plays a crucial role in ensuring the resilience and security of supply chains in Eurasia. However, the author points out operational challenges, such as road quotas, visa procedures for drivers, and freight costs driven by the closure of the Strait of Hormuz, while simultaneously advocating for the inclusion of the Turkish industry in EU support mechanisms under the "Union Origin" status.

Last, but not least, Namrita Chow (ECG Business Intelligence) focuses on the shifting trade routes in finished vehicle logistics (FVL) forced by the geopolitical situation. The Red Sea crisis and disruptions in the Strait of Hormuz since February 2026 have forced Ro-Ro carriers to bypass traditional ports in the United Arab Emirates in favor of alternative hubs, such as Duqm in Oman, Aqaba in Jordan, or ports in East and South Africa (e.g., Dar es Salaam, Durban). The presentation also analyzes the dynamic growth of car exports from China, which increased by 57% year-on-year in the first quarter of 2026, as well as changes in Chinese law restricting the export of so-called "zero-mileage used cars". In the European context, the author highlights the shrinking EU trade surplus in the passenger car segment—in 2025, imports to the EU rose by 11%, while exports grew by a mere 1.6%.

Regulatory stability, technological transformation, and a revolution in global logistics routes were the main topics dominating the discussions during the press conference held as part of the ECG General Assembly & Spring Congress in Istanbul. The main topics covered in the discussion were increased manufacturer engagement and network resilience, autonomy and AI in transport, the EU ETS Effect and criticism of EU Climate Policy, Chinese exports, containerization, and port paralysis.

A key trend is the clear return and stronger engagement of vehicle manufacturers (OEMs) within the ECG network structures. The experiences of recent crises have made manufacturers realize that even the best-designed internal logistics network can be easily paralyzed by external factors, such as bottlenecks in ports. As a result, OEMs are now much more willing to seek collaborative partnerships that extend beyond their own closed operational activities.

The deepening driver shortage remains a key structural challenge for today's transport market. Although modern heavy goods vehicles offer the highest standards of comfort, advanced digital systems, and high job satisfaction, the sector still grapples with profound image problems among the younger generation, hindering effective workforce replacement. The development of artificial intelligence (AI) and autonomous vehicles seems to be the natural answer to this crisis; however, the industry does not expect their mass adoption within the next five years. While the technology is already fully mature, the main bottleneck remains the law. The biggest barriers blocking the large-scale implementation of autonomous transport are inconsistent international regulations, unresolved liability issues for potential accidents, and a lack of adequate charging and refueling infrastructure. Experts predict that before these systems hit the highways, automation will take hold much faster in the urban passenger transport segment. Until then, the only short-term solution to the staffing crisis remains intensive investment in training and efforts to increase the industry's appeal to youth.

The introduction of the European Union Emissions Trading System (EU ETS) to the maritime sector has begun to actively reshape global trade routes. Vessels sailing through the Suez Canal are overwhelmingly choosing Turkey as their first port of call, allowing them to drastically shorten the route reported under the EU ETS and reduce costs. Industry representatives are critical of the European regulations, pointing out that they make local transport more expensive without delivering a global environmental impact. Older, higher-emission vessels and vehicles phased out of Europe are being sold and continue to operate in other parts of the world. ECG is calling for a clear, stable, and predictable timeline for changes (including regarding Euro 7 standards) to enable long-term investment planning in zero-emission assets.

An immense cost challenge for operators remains the imbalance in cargo flows between Asia and Europe. Ships are delivering finished cars (from Chinese, Japanese, and Korean brands) to Europe en masse but return to China largely empty. Due to the deficit of traditional Pure Car and Truck Carriers (Ro-Ro), Chinese manufacturers and lines such as Cosco have begun transporting cars in containers (using the meccano system) on a massive scale. However, this generates severe problems at container ports (such as Felixstowe in the UK), which lack PDI (Pre-Delivery Inspection) infrastructure, storage yards, and appropriate ramps. The necessity of hauling containers inland to be unpacked drastically increases costs and operational complexity.

In response to these challenges, ECG strongly appeals to manufacturers (OEMs) to move away from the short-term agreements preferred particularly by new players from Asia. Stable, multi-year contracts are the key to optimizing backhaul loads, reducing empty runs, and lowering CO2 emissions. Above all, however, they provide logistics companies with the stability required to undertake capital-intensive investments in modern, eco-friendly fleets and vessels. ■