



European Finished Vehicle Logistics (FVL) Cost Index

Includes the H1 2026 update in the appendix

European FVL Cost Index: H1 2026 Results Released

PwC Austria and ECG – The Association of European Vehicle Logistics have released the H1 2026 European Finished Vehicle Logistics (FVL) Cost Index, which tracks sector cost developments through June 2026. In response to continued market acceleration during the third quarter 2026, including significant movements in fuel markets, PwC Austria and ECG will also publish an early special Q3 2026 update. The additional release will provide stakeholders with timely insight into the evolving cost landscape.

Brussels, 08 October 2026

The European FVL Cost Index reached **160.9** in H1 2026, representing an overall cost increase of **60.9%** between January 2019 and June 2026. Compared with H2 2025, when the index stood at 151.1, it rose by **9.8 points**. All four segments increased in H1 2026, with the overall movement driven primarily by the rise in the FVL Sea Cost Index.

- **Logistics segment – road:** The FVL Road Cost Index reached **138.7** in H1 2026, representing an overall increase of **38.7%** between January 2019 and June 2026. Compared with H2 2025, when the index stood at **129.4**, it increased by **9.3 points**, mainly due to higher fuel and asset costs.
- **Logistics segment – sea:** The FVL Sea Cost Index is **217.4** in H1 2026, representing an overall increase of **117.4%** from January 2019 to June 2026. Compared with H2 2025 (**199.9**), the index increased by **17.5 points**, driven by higher bunker fuel costs and goods dues charges.
- **Logistics segment – rail:** The FVL Rail Cost Index reached **139.6** in H1 2026, representing an overall increase of **39.6%** between January 2019 and June

2026. Compared with H2 2025, when the index stood at **133.5**, it increased by **6.1 points**, mainly due to rising fuel costs and higher fees and wages in some European countries.

- **Logistics segment – compounds:** The FVL Compounds Cost Index is **131.2** in H1 2026, representing an overall increase of **31.2%** from January 2019 to June 2026. Compared with H2 2025 (**128.9**), the index increased by **2.3** points, primarily due to further increases in asset and labour costs.

The full set of updated H1 2026 figures, differentiated by segment and country, is available in the [appendix to the study published in March 2023](#).

For questions about the European FVL Cost Index or information on participating in future updates, please contact [PwC Austria](#).

About the European FVL Cost Index

The European Finished Vehicle Logistics (FVL) Cost Index is developed through a longstanding partnership between ECG – The Association of European Vehicle Logistics and PwC Austria. The Index provides regular updates and insights into cost developments in the FVL industry.

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.**

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