



Vehicle logistics stabilises, but securing future capacity demands visibility

As carmakers restructure and trade flows shift, ECG urges more transparency and fairer risk-sharing. Its annual conference in Copenhagen on 15-16 October 2026 tackled how the sector can keep vehicles moving in an era of disruption.

Copenhagen, 16 October 2026

European finished vehicle logistics (FVL) firms are reporting renewed optimism following a difficult 2025, according to the latest Confidence & Cost Trends Survey from ECG. However, the recovery brings focus on the sector's core dilemma: providers must commit to long-term investments in a market that is becoming ever more short-term and unpredictable.

"Markets are more volatile and less predictable, yet investment remains a long-term undertaking. The FVL sector requires greater visibility and earlier access to information, and we must also be open to adopting new supporting technologies." says **Mark Hindley, President of ECG**.

The long-running Confidence & Cost Trends Survey shows that pessimism has eased: 39% of respondents now expect volumes to rise in the next six months, while only 17% anticipate a decline. Shipping volumes have recovered, but there is little slack in the system - one in three providers has no spare capacity. Investment remains sluggish: 33% of all respondents are not currently planning to invest. On the road, empty running has doubled, rising from 20% to a worrying 40%. Interest in electric trucks is increasing, although conventional vehicles continue to dominate.

Several transformations at once

“The fundamentals of logistics remain, to deliver the appropriate capacity and services at the correct time and place. What has altered is the wider context in which these decisions are made.” Hindley observes.

Vehicle logistics is undergoing a series of changes: industry evolution, technological advancements, new trade corridors, and tougher sustainability requirements. The shift towards electrification, emergence of new manufacturing centres, and a surge in Chinese exports are reshaping logistics.

Manufacturers’ rapidly developing strategies underline the speed of these changes. The pressing question for logistics is how rapidly capacity, routes and infrastructure can be adjusted - particularly if such disruptions prove to be structural rather than merely temporary.

ECG's call: visibility, dialogue and shared risk

To bridge the gap between short-term market pressures and long-term investment, ECG is advocating for enhanced transparency. Forecasts may be less reliable in an increasingly volatile market, making early dialogue, greater transparency and the timely sharing of available information even more important.

“ECG is therefore calling for greater transparency, longer-term capacity commitments and a fairer sharing of risk, giving logistics providers more confidence to invest and helping customers maintain more resilient vehicle logistics networks.” Hindley says.

These topics were centre stage at ECG’s Copenhagen conference on 15–16 October 2026. The gathering examined how port capacity and infrastructure need to evolve in response to car manufacturers’ restructuring, and what measures are necessary to ensure the continued movement of vehicles during this period of upheaval. The conference brought together FVL service providers and car makers, logistics specialists, and policymakers who are influencing these key decisions.

Note to editors:

The Association of European Vehicle Logistics (ECG) represents companies engaged in the transport, handling and storage of finished vehicles across Europe. Its quarterly Confidence & Cost Trends Survey has tracked business sentiment and cost developments among its members since 2010.

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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.**

