

ECG – Vehicle logistics stabilises, but securing future capacity demands visibility



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.