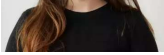


Vehicle logistics

European vehicle logistics confidence rebounds, but capacity shortages threaten investment

European finished vehicle logistics operators are reporting improving confidence, but limited spare capacity, rising empty running and uncertainty over future demand are undermining investment, according to ECG's latest industry survey.



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Truck outside ECG's annual conference 2026 Source: ECG

European finished vehicle logistics providers are reporting renewed optimism following a difficult 2025, but limited spare capacity, rising empty running and uncertainty over future demand are threatening investment, according to the Association of European Vehicle Logistics (ECG).



latest confidence & cost trends survey.

Only 17% of respondents anticipate a decline in volumes, suggesting that sentiment is improving following a challenging 2025. However, the recovery is exposing structural weaknesses in the sector, particularly around capacity availability, investment and the ability of logistics providers to respond to rapidly changing vehicle production and trade flows.

The findings were presented alongside ECG's annual conference, held in Copenhagen, Denmark, on October 15-16, where industry representatives discussed the challenges facing vehicle distribution networks as carmakers restructure their manufacturing footprints and new trade corridors emerge.

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

Spare capacity tight as empty running doubles

Despite improving confidence, capacity constraints remain a significant concern for European vehicle logistics providers.

According to ECG, one in three operators currently has no spare capacity, leaving limited flexibility to respond to fluctuations in vehicle production and distribution demand.

Meanwhile, 33% of respondents are not planning to invest, raising questions about the industry's ability to expand or modernise its transport fleets and infrastructure as demand patterns evolve.

One of the survey's most striking findings concerns empty running in road transport, which has doubled from 20% to 40%. The increase highlights growing inefficiencies in finished vehicle distribution networks and the difficulty of balancing transport flows as production locations and delivery requirements change.



further pressure on margins.

Interest in electric vehicle transporters is increasing, according to ECG, although conventional trucks continue to dominate the sector. The transition presents another investment challenge for operators already facing uncertainty over future demand and capacity requirements.

Chinese exports and shifting production reshape vehicle logistics

Beyond immediate capacity concerns, ECG warned that the European vehicle logistics industry is undergoing several transformations simultaneously.

The growth of Chinese vehicle exports, the emergence of new manufacturing centres and the transition towards electrification are changing established vehicle distribution patterns.

These developments are creating new requirements for ports, inland transport networks and vehicle storage facilities, while increasing uncertainty over where logistics capacity will be needed in the coming years.

Manufacturers' changing production and sourcing strategies are also forcing logistics providers to reconsider existing transport routes and infrastructure requirements.

The challenge is particularly significant for businesses making long-term investments in specialist equipment, including car transporters, rail wagons and vehicle-handling facilities, where investment decisions must be made well before future demand can be guaranteed.

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

ECG said the industry must determine how quickly existing logistics networks can adapt to changes in manufacturing and trade flows, particularly where these represent permanent structural shifts rather than temporary disruptions.



shared investment risk

Against this backdrop, ECG is calling for closer collaboration between vehicle manufacturers and logistics providers to improve demand visibility and support future capacity investment.

The association argues that traditional forecasting is becoming less reliable as market conditions grow more volatile, making earlier communication and the sharing of available information increasingly important.

Longer-term capacity commitments and a more balanced distribution of investment risk could also help operators make decisions about fleet replacement, infrastructure development and new technologies.

"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," said Hindley.

These issues formed a central part of discussions at ECG's Copenhagen conference, which examined how port infrastructure and transport capacity must evolve to accommodate changes in vehicle manufacturing and distribution.

The conference brought together vehicle manufacturers, logistics service providers, industry specialists and policymakers to examine how the sector can maintain reliable vehicle movements through a period of significant transformation.

For Europe's finished vehicle logistics industry, the latest survey suggests that recovering demand alone may not be sufficient to secure future capacity. Without greater certainty over volumes, improved network efficiency and closer cooperation with manufacturers, logistics providers could remain reluctant to invest even as available capacity becomes increasingly constrained.

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