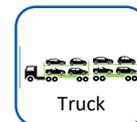
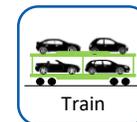




The Association of European Vehicle Logistics

Wolfgang Göbel

ECG President





THE ASSOCIATION
OF EUROPEAN
VEHICLE LOGISTICS

ECG CONFERENCE 2018

RIDING THE WAVE

STAYING AHEAD

IN OUR FAST MOVING WORLD

HYATT REGENCY HOTEL, MAINZ, GERMANY.

DATE : 25/26 OCTOBER 2018

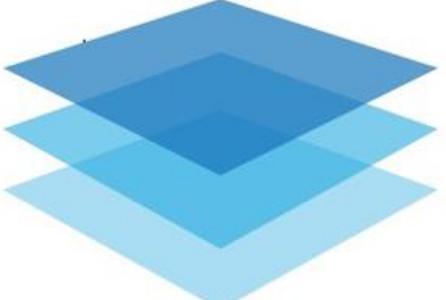
Our Partners in Mainz



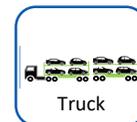
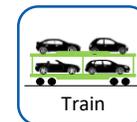
Kässbohrer
Driven by professionals®

ROLFO

 **Lohr**

 **PROACT**
INTERNATIONAL

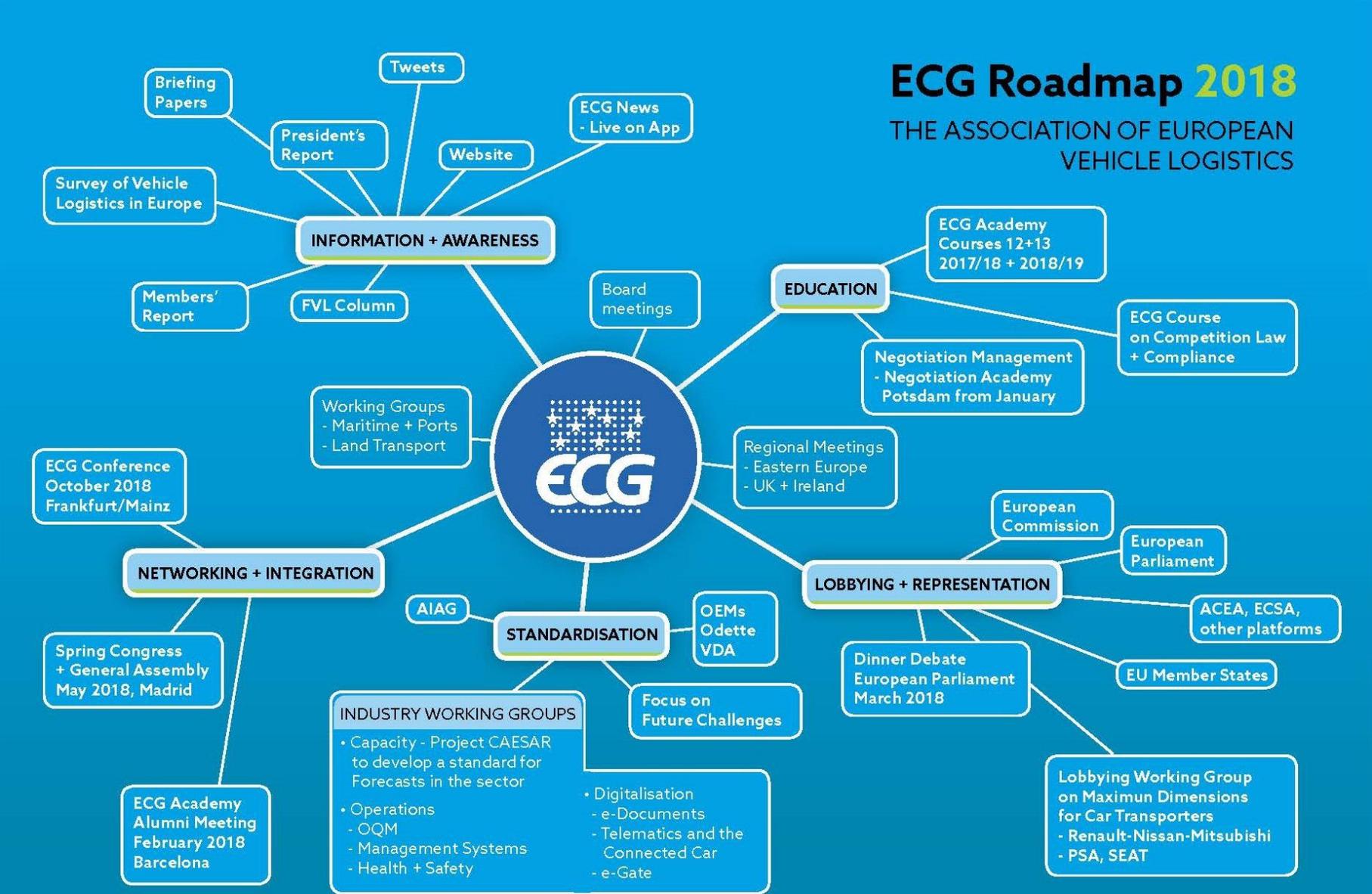
 **INFORM**



ECG Journey 2018

ECG Roadmap 2018

THE ASSOCIATION OF EUROPEAN VEHICLE LOGISTICS



March 2018 Dinner Debate in the EP

Our Multimodal industry and the Mobility Package – what do we need?



Driver's topics and request

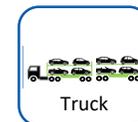
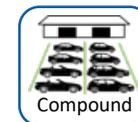
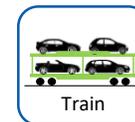
- Safe and secure parking



Driver Shortage



- It is estimated that over the next 10-15 years around 40% of German truck drivers will retire, which, given current trends, will create a shortfall of 150,000 drivers.
- In the UK, the market is estimated to be around 45-52,000 drivers short, with another 35,000 drivers likely to retire in the next two years



What may ECG do to support members

- ... to make the profession of the car transporter driver more attractive?



Shortage of skilled people

- What may ECG do to support our members to make jobs in the FVL more attractive



May 2018 General Assembly

- Update of the members of all ECG activities
- New Board elected



April and October 2018 Industry Meetings in Frankfurt & Mainz



HONDA

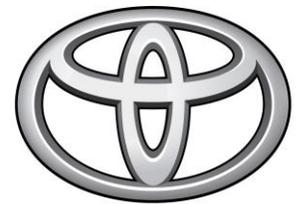
DAIMLER



HYUNDAI

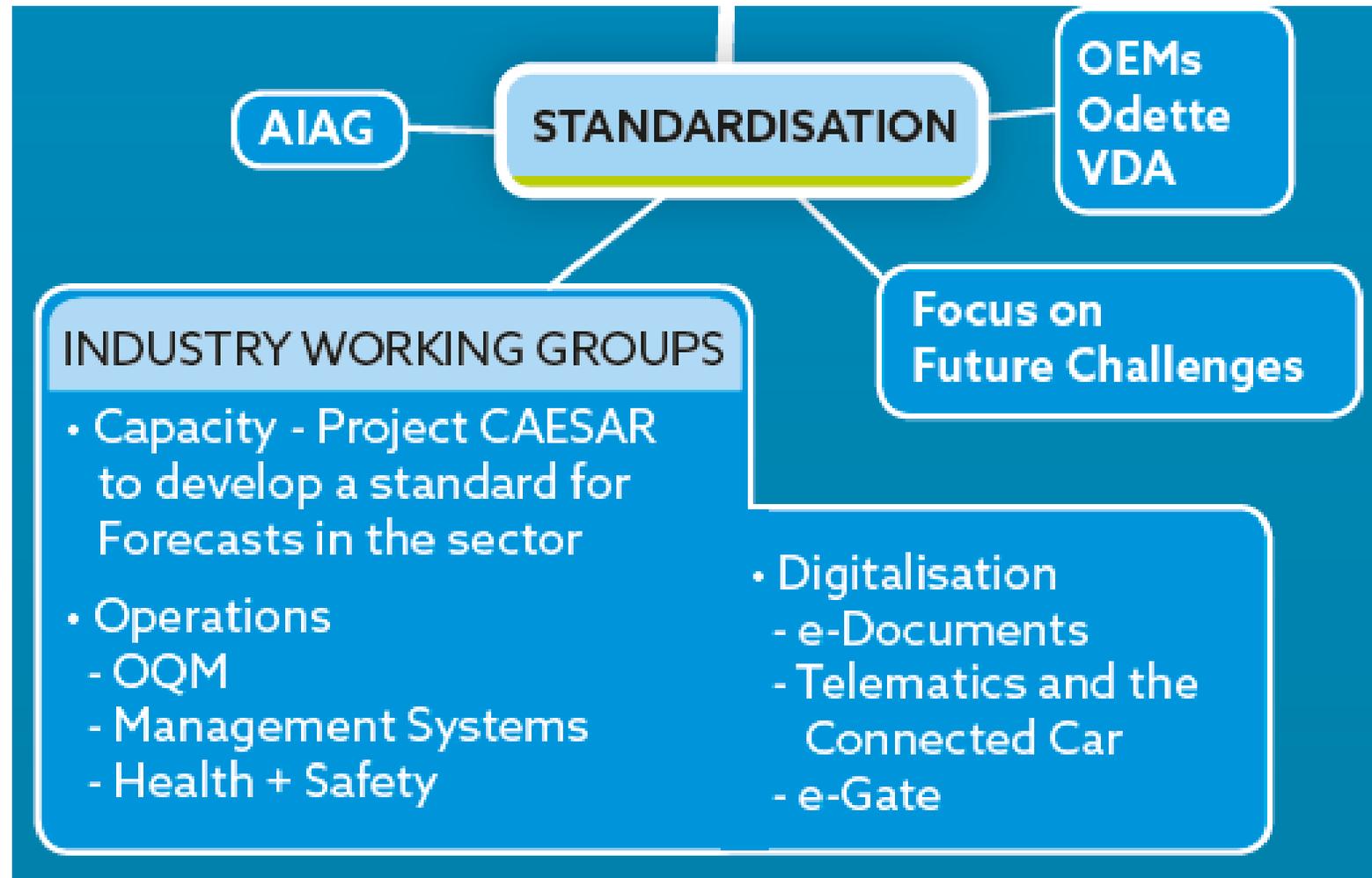


SEAT



TOYOTA

Industry Working Groups



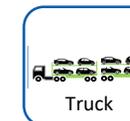
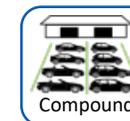
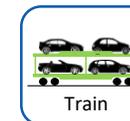
Capacity Working Group Project Caesar



Ben Waller
Associate Director
ICDP

**“It is About the Process,
not the Numbers”**

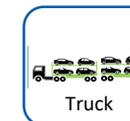
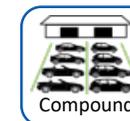
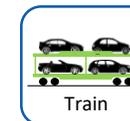
The model is based on mutual alignment of processes from multiple sources of data which are then reviewed and aligned by a logistics planner to comply with the delivery potential of the LSP.



Capacity Working Group Project Caesar



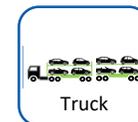
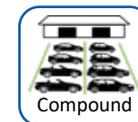
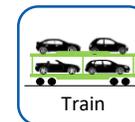
- **Phase I**
 - Surveys among 6 OEMs and 6 LSPs with detailed analysis
- **Phase II**
 - Pilot phase with various OEMs and LSPs of all modes of the sector and services
- **Phase III**
 - Roll-out



Caesar vs. the impact of WLTP



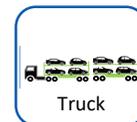
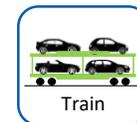
- New testing regime introduced on 1 September 2018
 - Not all model variants have been homologated yet
 - Higher CO₂ levels mean less tax incentives for certain models (Plug-in Hybrids)
-
- Spike in sales before September, drop afterwards!
 - Huge short-term storage demands
 - Extra movements to/from storage



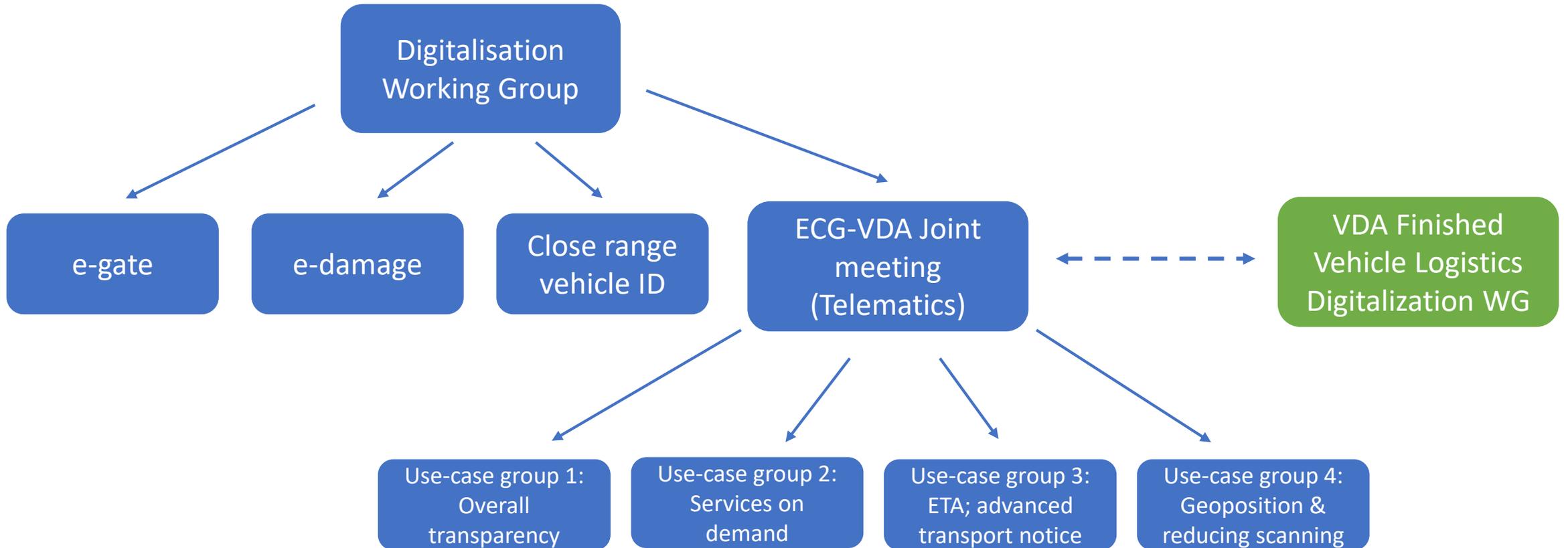
Caesar vs. the impact of WLTP



- Could we have done better?
- Have we destroyed value in the supply chain?



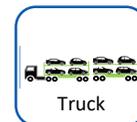
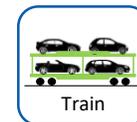
Industry Working Group Digitalisation



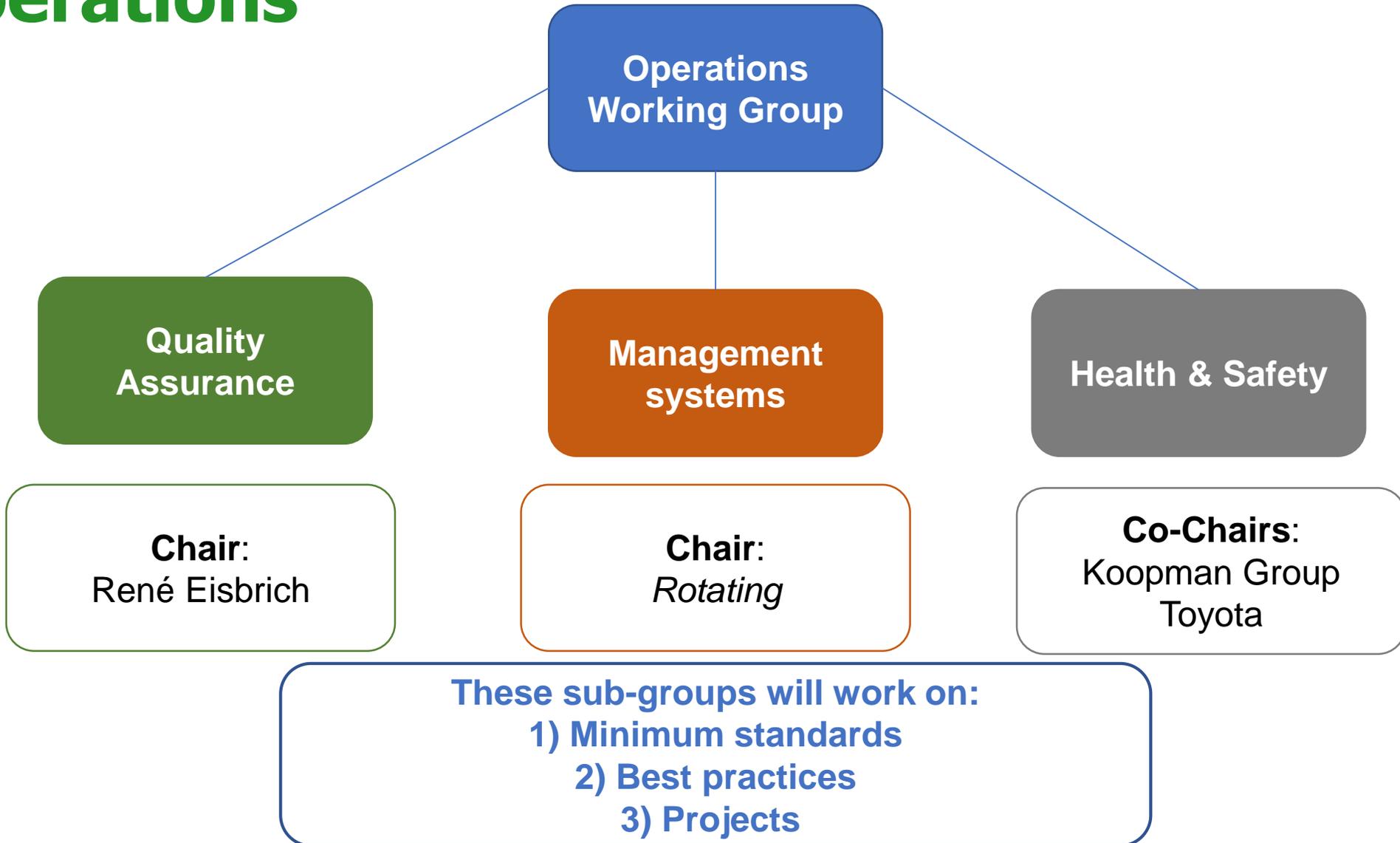
Industry Working Group Digitalisation



- How to harvest the efforts of the Digitalisation Working group?
 - For example: link of the ECG driver app with the e-gate system/secure parking app



Industry Working Group Operations



Education

- Negotiation Academy Potsdam
 - 4 courses in 2018
- Contrast Law
 - Compliance with EU competition law
- ECG Academy
 - 13th course started this week in Mainz

Negotiation
Academy
Potsdam

• • • contrast
• • • •



Education: ECG Academy



- New set-up for Innovation Lab focused on future challenges and stronger link to the ECG Board
- 2 topics for 2018/19:
 1. CASE as key topic for the automotive industry and its relevance for FVL



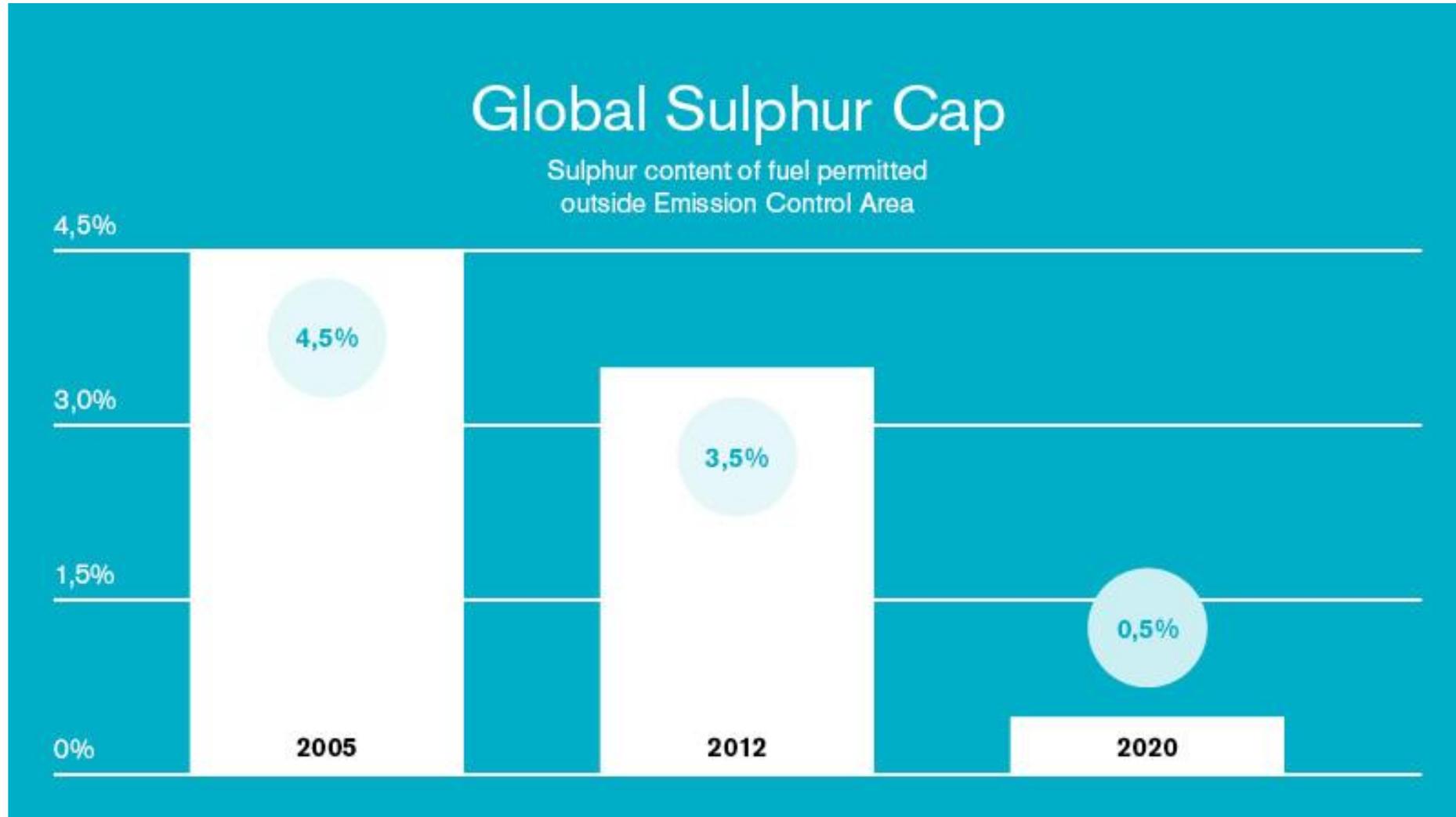
Education: ECG Academy



2. Digitalisation and its impact on FVL



Industry Challenges 2018



“Stay with us and send us your best people.”



Thank you for joining!