

# Survey of Vehicle Logistics in Europe

Edition 2020-21



# Introduction

- ECG Survey of Vehicle Logistics in Europe (“Biennial Survey”) is prepared every two years
- This is the only publication for the European Vehicle Logistics sector, also covering Russia, Turkey and Ukraine

## SURVEY OF VEHICLE LOGISTICS IN EUROPE

2020/2021



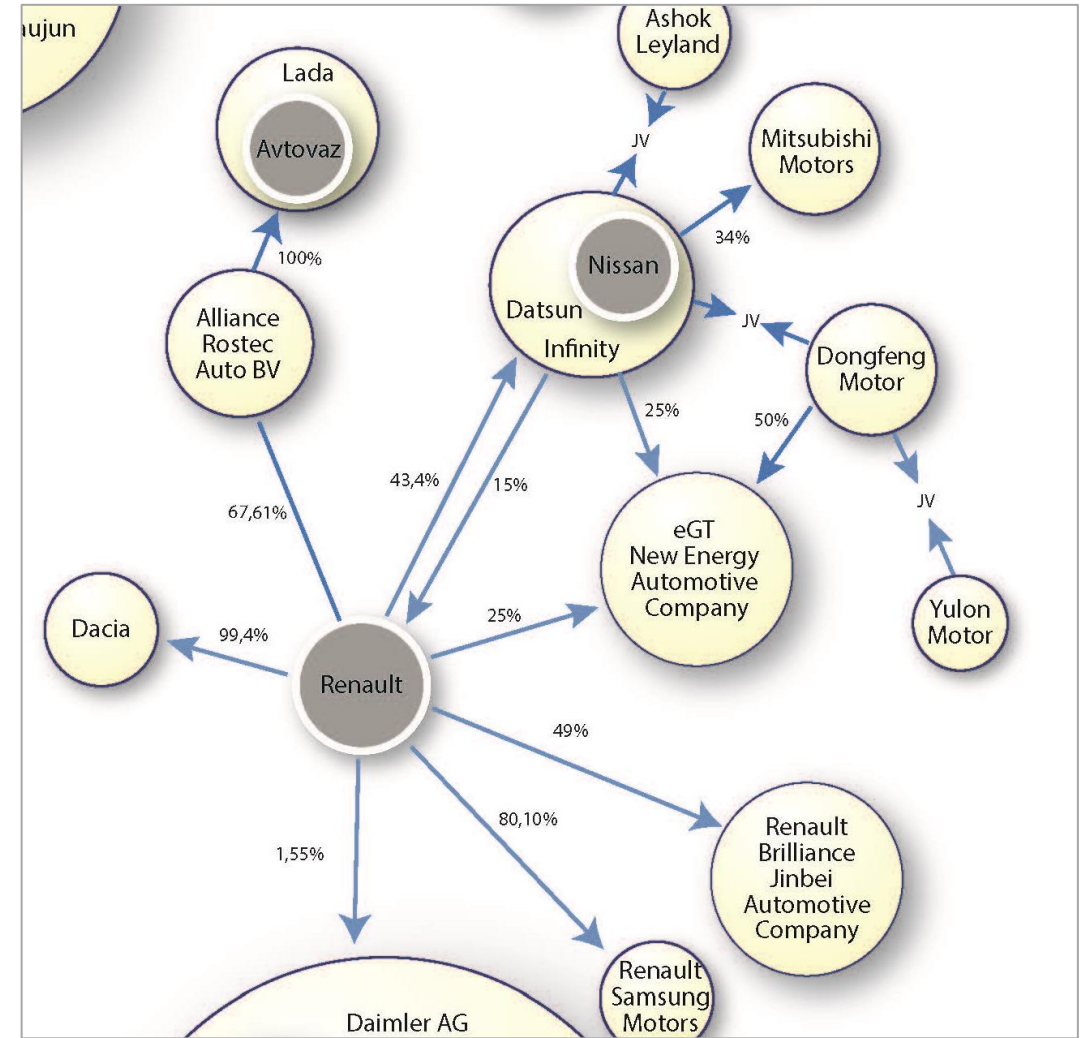
# Sources

- The automotive industry economic outlook is provided by **LMC Automotive**
- Statistical data comes from **ACEA**
- The country-by-country analysis is performed by the **ECG Survey Working Group** which brings together logistics experts from member companies from all around Europe
- For the sales forecast for each country ECG has a long-standing co-operation with **IHS Markit**
- **ECG members** provide data on their business and internal structure



# Automotive Universe

- The Survey gives a detailed picture on the co-operation between car manufacturers and their different brands



# OEM profiles

- The ECG Survey gives an overview of the top car manufacturer groups in Europe. Each company has a one-page introduction with a description of the company's logistics strategy



**Headquarters:**  
Munich (DE)

**2019 Turnover:**  
EUR 104.21 bn

**2019 Operating result:**  
EUR 7.12 bn

**Vehicles produced:**  
2,505,741

**Brands:**  
BMW, MINI, Rolls Royce  
BMW Motorcycles

**Car Production Plants in Europe:**  
Munich (DE)  
Dingolfing (DE)  
Regensburg (DE)  
Berlin (DE)  
Leipzig (DE)  
Oxford (UK)  
Goodwood (UK)  
Graz (A), Contract Partner MSF  
Born (NL), Contract Partner VDL Group

**Employees:**  
133,778

**Websites:**  
- [www.bmwgroup.com/en](http://www.bmwgroup.com/en)  
- Facebook: [www.facebook.com/BMWGroup](https://www.facebook.com/BMWGroup)  
- Twitter: [twitter.com/BMWGroup](https://twitter.com/BMWGroup)  
- YouTube: [www.youtube.com/user/BMWGroupView](https://www.youtube.com/user/BMWGroupView)  
- Instagram: <https://www.instagram.com/bmwgroup>  
- LinkedIn: <https://www.linkedin.com/company/bmwgroup/>

## BMW GROUP

### Background

With its four brands BMW, MINI, Rolls-Royce and BMW Motorrad, the BMW Group is the world's leading premium manufacturer of automobiles and motorcycles and also provides premium financial and mobility services. The BMW Group production network comprises 31 production and assembly facilities in 15 countries; the company has a global sales network in more than 140 countries. In 2019, the BMW Group sold over 2.5m passenger vehicles and more than 175,000 motorcycles worldwide. The profit before tax in the financial year 2019 was €7.118bn on revenues amounting to €104.210bn. As of 31 December 2019, the BMW Group had a workforce of 133,778 employees. The success of the BMW Group has always been based on long-term thinking and responsible action. The company has therefore established ecological and social sustainability throughout the value chain, comprehensive product responsibility and a clear commitment to conserving resources as an integral part of its strategy.

### Production and Logistics Strategy

The BMW Group's production system is characterised by its high flexibility and efficiency, enabling it to respond rapidly to changing market situations and fluctuating regional demand. The BMW Group's production expertise also makes a contribution to its profitability. Its production network leverages innovative technologies from the fields of digitalisation and Industry 4.0, including applications from the worlds of virtual reality, artificial intelligence and 3D printing. Standardised processes and structures ensure consistent premium quality throughout the production system. At the same time, the BMW Group offers its customers a high degree of individualisation. Sustainability in production and along the value chain has played a fundamental role for the BMW Group for many years. The Company has been continually reducing the use of resources such as energy and water and produces less waste and CO<sub>2</sub> emissions. In 2019 the production of a vehicle required on average only half the resources and CO<sub>2</sub> as in 2006. From 2020 onwards all plants operated directly by the BMW Group globally as well as those of the joint venture BMW Brilliance Automotive in China will obtain energy exclusively from renewable sources.

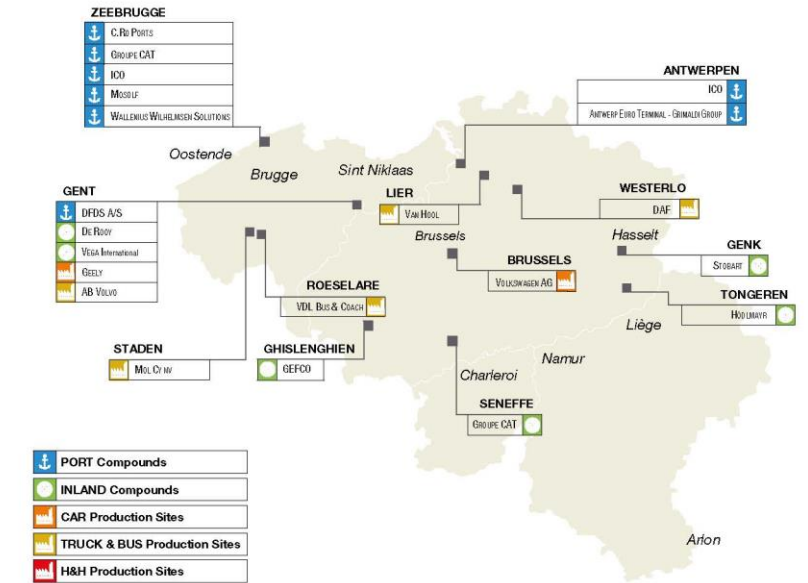
### Future Development and Vision

A major factor in the enduring success of the BMW Group is its consistent focus on the future. Innovation is an integral part of its corporate philosophy. Shaping individual mobility and finding innovative solutions today for the needs of tomorrow is a key driving force. Research and development (R&D) are therefore of major importance for the BMW Group in ensuring its long-term commercial success as a premium manufacturer. In its development of new technologies, the BMW Group focuses on the topics of emissions-reducing drivetrain systems, digitalisation and autonomous driving with the aim of creating completely new experiences and future ways of travelling. A key prerequisite for success both now and in the future is the ability to anticipate customer needs and wishes in all fields of technology and implement developments in a way that adds value for the customer. However, as a premium manufacturer, the BMW Group is driven by the aspiration to exceed customer expectations in every respect. With this approach, the BMW Group strives to find outstanding solutions for the overall (mobility) needs of its customers.



# Country-by-country analysis

- The Survey provides information on production sites in each country together with the sales and production forecast of cars and LCVs.
- The data on production sites is gathered by the ECG Working Group and the forecast data comes from IHS.



PORT COMPOUNDS							
Operator	City	Rail connection	Compound Area (m <sup>2</sup> )	Storage area (m <sup>2</sup> )	Max Storage Capacity (units)	Workshop (m <sup>2</sup> )	Services provided <sup>(*)</sup>
ANTWERP EURO TERMINAL - GRIMALDI GROUP	ANTWERPEN	YES	1.500.000	800.000	40.000	16.000	1, 2, 3, 4, 5
C.R.O PORTS	ZEEBRUGGE	n/d	n/d	n/d	n/d	n/d	n/d
DFDS A/S	GENT	YES	270.000	250.000	> 10.000	n/a	1, 2, 3
GROUPE CAT	ZEEBRUGGE	YES	n/d	250.000	n/d	10.000	1, 2, 3, 4, 5
IGO - INTERNATIONAL CAR OPERATORS	ANTWERPEN (VRASENE TERMINAL)	YES	1.250.000	800.000	40.000	13.600	1, 2, 3, 4, 5
	ZEEBRUGGE (MT)	YES	800.000	500.000	24.500	5.000	1, 2, 3, 4, 5
	ZEEBRUGGE (ST)	YES	1.700.000	1.120.000	56.000	11.000	1, 2, 3, 4, 5
MOSOLF SE & CO. KG	ZEEBRUGGE	YES	n/d	220.000	n/d	7.600	1, 2, 3, 4, 5
WALLENIUS WILHELMSEN SOLUTIONS	ZEEBRUGGE	YES	600.000	n/d	n/d	1.500	1, 2, 3, 4, 5

<sup>(\*)</sup> 1 = Storage 2 = Pre-Delivery-Inspection (PDI) 3 = Mechanical/Technical Services 4 = Refurbishment 5 = Paint

INLAND COMPOUNDS							
Operator	City	Rail connection	Compound Area (m <sup>2</sup> )	Storage area (m <sup>2</sup> )	Max Storage Capacity (units)	Workshop (m <sup>2</sup> )	Services provided <sup>(*)</sup>
DE ROOY	GENT	NO	n/d	20.000	n/d	n/a	1
GEFCO	GHISLENGHIEN	YES	400.000	n/d	17.500	10.480	1, 2, 3, 4, 5
GROUPE CAT	SENEFFE	YES	n/d	180.000	n/d	2.500	1, 2, 3, 4, 5
HÖDLMAYR INTERNATIONAL AG	TONGEREN	YES	n/d	132.000	5.200	n/a	1, 2, 3, 4, 5
STOBART	GENK	YES	200.000	200.000	9.000	500	1, 2, 3
VEGA INTERN. CAR-TRANSPORT & LOGISTIC-TRADING GMBH	GENT	NO	n/d	25.000	n/d	n/a	1

<sup>(\*)</sup> 1 = Storage 2 = Pre-Delivery-Inspection (PDI) 3 = Mechanical/Technical Services 4 = Refurbishment 5 = Paint

# Sales forecast for each country

SALES FORECAST PASSENGER CARS							
Group	Brand	CY 2018	CY 2019	CY 2020	CY 2021	CY 2022	CY 2023
ALPINA	ALPINA	15	11	36	43	37	35
ASTON MARTIN	ASTON MARTIN	55	44	59	109	85	78
BMW	BMW	40.059	36.631	33.499	32.116	34.854	33.722
	MINI	8.201	8.075	6.707	5.878	5.897	6.045
	ROLLS-ROYCE	15	30	27	44	36	28
BORGWARD	BORGWARD	-	-	60	107	95	189
CATERHAM	CATERHAM	8	8	11	11	11	15
DAIMLER	MERCEDES-BENZ	35.529	37.945	29.112	30.370	31.340	29.554
	SMART	1.741	1.557	466	695	820	1.200
DONGFENG	DONGFENG	-	-	1	-	-	-
FCA	ALFA ROMEO	3.011	1.935	1.205	1.112	1.734	1.794
	FIAT	16.426	16.478	11.815	11.922	10.888	10.875
	JEEP	4.930	4.888	3.864	3.960	4.295	5.289
	LANCIA	-	-	1	-	-	-
	MASERATI	222	174	103	142	519	550
FERRARI	FERRARI	100	127	83	94	112	125
FMC	BYTON	-	-	-	4	40	49
FORD	FORD	23.837	24.107	18.312	18.215	18.404	17.687
GEELY	LOTUS	34	45	33	30	72	103
	LYNK&CO	-	-	10	380	928	1.158
	POLESTAR	-	-	134	580	907	1.386
	VOLVO	20.155	21.302	14.220	14.282	14.272	11.927
GENERAL MOTORS	CADILLAC	11	1	5	27	34	29
	CHEVROLET	32	4	-	-	-	-
HONDA	HONDA	3.093	3.200	2.655	2.935	3.478	3.778
HYUNDAI	GENESIS	-	-	-	-	177	243
	HYUNDAI	21.728	21.624	16.599	18.891	23.191	22.077
	KIA	13.950	14.807	11.399	10.900	12.300	12.371
INEOS	INEOS	-	-	-	-	120	260
LUCID MOTORS	LUCID	-	-	-	5	35	77
MAHINDRA & MAHINDRA	SSANGYONG	965	740	796	753	1.189	1.153
MAZDA	MAZDA	8.693	9.537	6.493	8.854	8.947	9.089
MCLAREN	MCLAREN	21	16	21	40	47	41
MORGAN	MORGAN	27	23	25	16	-	-
PSA	CITROEN	23.562	27.480	19.831	22.106	19.476	21.248
	DS	1.863	2.374	2.092	2.579	3.703	3.852
	OPEL	34.424	31.206	22.815	26.532	27.388	24.947
	PEUGEOT	42.640	43.097	32.833	37.244	41.181	39.712

# Member pages

- Each ECG member has a page where the main company data are published, containing subsidiaries, financial figures and assets, as well as the list of the top management

people in logistics



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AG

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Web www.hoedlmayr.com





Hödlmayr International AG is a family-owned, internationally operational company with Finished Vehicle Logistics as its core competence. The company specialises in complete supply chain solutions from Releasing Agent to international and national transport services.

In addition to the management of own large transport fleets in Europe, the group has a European network of logistics centres in which vehicles are prepared for international and regional markets.

The Group motto is "people in logistics" and the human factor forms the focal point of the activities. Hödlmayr upgrades its value added chain according to a sustainable "Go Green" initiative involving projects such as photovoltaic electricity, water power, best-in-class truck fleet and multimodal transport solutions using Rail and Short-Sea transportation.

**CORPORATE STRUCTURE AND RELATIONSHIPS**

With branches in 16 countries, the Hödlmayr Group has one of the widest European Finished Vehicle Logistics networks. As a family business, Hödlmayr defines strategies over generations and invests in own assets (logistics centres, truck fleet) and also operates rail services between plants, ports and compounds. The logistics network is supported through the integration of partner companies (franchise partners and subcontractors).

OFFICES OR FORMAL REPRESENTATION		SERVICES PROVIDED (COUNTRIES)			
Austria	Netherlands	Austria	Germany	Portugal	Ukraine
Belgium	Romania	Belgium	Greece	Romania	United Kingdom
Bulgaria	Serbia	Bulgaria	Hungary	Serbia	Caucasus Region
Croatia	Slovakia	Croatia	Italy	Slovakia	Middle East
Czech Republic	Slovenia	Cyprus	Luxembourg	Slovenia	
Georgia	Spain	Czech Republic	Malta	Spain	
Germany	Turkey	Denmark	Netherlands	Sweden	
Hungary	Ukraine	France	Poland	Turkey	

**MANAGEMENT**      **CORPORATE STATISTICS 2019**

- Chairman*  
**Johannes Hödlmayr**
- Chief Operating Officer*  
**Martin Wifflingseder**
- Chief Financial Officer*  
**Robert Horvath**
- Chief Marketing Officer*  
**Wolfgang Niessner**
- Director International Sales & BD*  
**Paul Steininger**
- General Manager Hödlmayr Rail Logistics*  
**Andreas Sundl**
- General Manager Hödlmayr High & Heavy*  
**Wolfgang Aigner**
- Manager Corporate Quality Management*  
**Jozsef Prekopecz**

<i>Employees</i>	<b>2,000</b>	<i>Inland compounds</i>	<b>12</b>
<i>Trucks operated</i>	<b>810</b>	<i>Port compounds/</i>	
<i>Wagons operated</i>	<b>320</b>	<i>Port terminals</i>	<b>1</b>
<i>Total vehicles handled</i>	<b>1,750,000</b>	<i>Total storage area (m²)</i>	<b>1,300,000</b>



# Advertisement

- There is also a possibility to publish an advertisement in the ECG Survey for members and all other companies wishing to benefit from the visibility this publication offers in the sector
- ECG members benefit from a preferential rate for their advertisement



## ***Moving cars today, providing mobility tomorrow.***

The Lagermax Group, which headquarters in Salzburg /Austria, was founded in 1920 and currently operates 55 subsidiaries in twelve European countries. Within our division of finished vehicle logistics (FVL) we offer a comprehensive, as well as customized logistics network and rank among the biggest European companies in this field. Our range of services is complemented by value added technical expertise.



### **Compounding / Storage**

An area of 2.000.000 sqm is used for receiving, storing and dispatching of vehicles in 7 countries. OEMs, importers and dealers are enjoying our vehicle management services on 11 compounds.



### **Transportation**

The team of Lagermax FVL is one of the largest and most experienced one in automotive business. Our managed truck fleet of ~750 specialized car transporters are transporting >1.500.000 cars from the end of the vehicle assembly line to the dealers in CEE.



### **Technical services**

A substantial range of repair and modification services is provided. State of the art processes for cleaning, assessing, repairing and modifying vehicles guarantee a perfect condition, technically as well as visually.

### **Lagermax Autotransport GmbH**

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atp.office@lagermax.com, www.lagermax.com