



Table of Contents

Chapter 1	Executive summary	5
	Table 1.1 Automotive inbound component logistics challenges	5
	Table 1.2 Automotive outbound finished vehicle logistics (FVL) challenges	6
	1.1 Methodology	7
Chapter 2	European automotive logistics market forecast 2023-2033	8
	Figure 2.1 European automotive logistics market forecast 2023-2033 (€bn)	9
	2.1 European automotive logistics market analysis	9
Chapter 3	European automotive logistics market forecast by type 2023-2033	10
	Figure 3.1 European automotive logistics market forecast by type 2023-2033 (€bn)	11
	Figure 3.2 European automotive logistics market by type 2023 (€bn, % Share)	11
	Figure 3.3 European automotive logistics market by type 2033 (€bn, % Share)	12
	3.1 Inbound component logistics analysis	13
	3.2 Premium, time critical and priority logistics analysis	13
	3.3 Outbound finished vehicle logistics (FVL) analysis	14
	3.4 Aftermarket and reverse logistics analysis	15
Chapter 4	European automotive logistics market forecast by mode 2023-2033	17
	Figure 4.1 European automotive logistics market forecast by mode 2023-2033 (€bn)	18
	Figure 4.2 European automotive logistics market by mode 2023 (€bn, % Share)	19
	Figure 4.3 European automotive logistics market by mode 2033 (€bn, % Share)	19
	4.1 Road	20
	4.2 Rail	20
	4.3 Shipping	21
	Figure 4.4 Drewry container index 2016-2023	21
	4.4 Air	22
Chapter 5	Leading European automotive inbound component logistics companies	23
	5.1 Leading European automotive inbound component logistics companies	24
	Table 5.1 Leading European automotive inbound components logistics companies 2022	24
	Figure 5.1 Leading European automotive inbound components logistics companies 2022 (€bn, % Share)	25
	5.2 Methodology	25
	5.3 European automotive inbound component logistics company analysis	26

5.4 Leading European automotive inbound component logistics companies	27
5.5 Deutsche Post DHL Group	27
5.5.1 DHL Global Forwarding, Freight	27
5.5.2 DHL Supply Chain (DHLSC)	27
5.6 Deutsche Bahn (DB) Group	27
5.6.1 DB Cargo	27
5.6.2 DB Schenker	27
5.7 DSV	28
Table 5.2 DSV key acquisitions 2019-2022	28
5.8 CMA-CGM	28
Table 5.3 CMA-CGM key acquisitions 2019-2022	28
5.9 DP World	29
Table 5.4 DP World key acquisitions 2020-2022	29
5.10 SNCF Group	29
5.10.1 Geodis	29
5.10.2 Rail Logistics Europe (RLE)	29
5.11 Kuehne + Nagel	30
5.12 Maersk	30
Table 5.5 Maersk key acquisitions 2020-2022	30
5.13 XPO Logistics	30
Table 5.6 Other European automotive inbound components logistics companies	31
Table 5.7 European automotive aftermarket logistics companies	31
5.14 European premium, time critical and priority logistics analysis	31
Table 5.8 Leading European premium, time critical, and priority logistics companies	31
Chapter 6 Leading European automotive outbound finished vehicle logistics companies	32
6.1 Leading European automotive outbound finished vehicle logistics companies	33
Table 6.1 Leading European automotive outbound finished vehicle logistics companies 2022	33
Figure 6.1 Leading European automotive outbound finished vehicle logistics companies 2022 (€bn, % Share)	34
6.2 Methodology	34
6.3 European automotive outbound finished vehicle logistics companies analysis	35
6.4 Leading European automotive outbound finished vehicle logistics companies	35
6.5 CMA-CGM	35

Table 6.2 CMA-CGM key acquisitions 2020-2022	35
6.6 Hyundai Glovis	36
6.6.1 Adampol	36
6.6.2 Stena-Glovis JV	36
6.7 Groupe Cat / Cat Vehicle Logistics	36
6.8 Deutsche Bahn (DB) Group	37
6.8.1 DB Cargo	37
6.8.2 DB Schenker	37
6.9 BLG Logistics	37
6.10 Mosolf	37
6.11 Wallenius Wilhelmsen	37
6.11.1 Eukor	38
6.11.2 UECC (United European Car Carriers)	38
6.12 Constellation Automotive Group	38
6.12.1 BCA	38
6.12.2 ECM	38
6.13 Hödlmayr International	38
6.14 Höegh Autoliners	39
Table 6.3 Other European automotive outbound finished vehicle logistics companies	39
Chapter 7 Conclusions and recommendations	40
7.1 European automotive inbound component logistics challenges	41
7.2 European automotive outbound finished vehicle logistics challenges	42
Table 7.1 Recommendations	42
Chapter 8 Glossary	45
Credits	46