Logistics as an enabler for the future of automotive mobility

How different forms of transport logistics impact the value chain in automotive finance and mobility services.

White paper

Content

Future of mobility

Changes in the automotive mobility landscape

Various key trends and changes are shaping today's automotive industry landscape and unlocking valuable opportunities through 2035.

Image 1 – Key changes

- **Focus on usage-based mobility products**
- **From private to corporate ownership**
- **Rising sales of used cars**
- **xEVs replacing ICEs**
- **Growing importance of online sales**
- **Refinancing gains relevance**

Image 2 – Changes in the automotive mobility landscape

From...		*To...*
Asset financiers	❯	Asset managers
Lifecycle management	❯	Multiple lifecycle management
Sales focus	❯	Relationship focus
Transactional	❯	Customer experience
Standardized	❯	Personalized
Reactive	❯	Proactive
...	❯	...

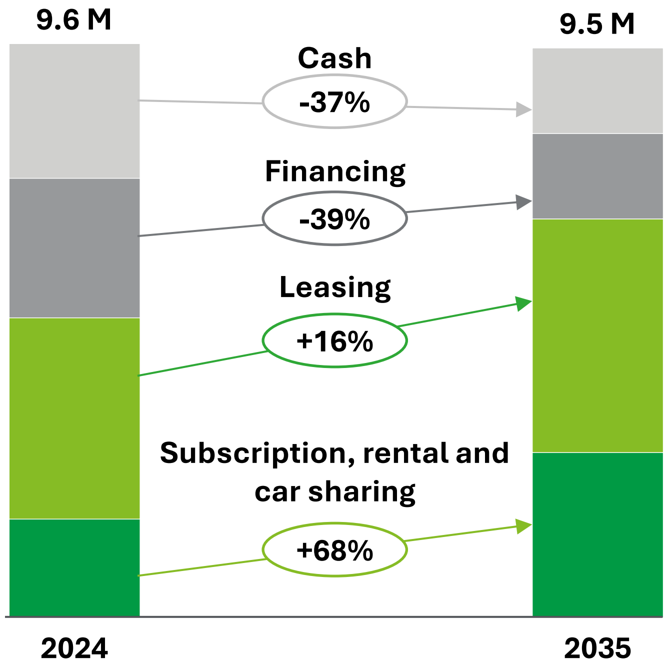
Key **market and societal trends** are putting pressure on **automotive mobility players** to transform their business operations. These trends **impact how mobility providers are structured**, how they **operate**, and how they act as organizations.

Source: Monitor Deloitte, Deloitte Future of Automotive Mobility Study 2023

Future of mobility

An increasing number of customers are turning to flexible, usage-based vehicle offerings, while the demand for vehicle ownership is significantly declining.

Image 3 – New vehicle sales development in Europe (by sales channel, number of vehicles sold in EU5 markets)



Source: Onlogist, Monitor Deloitte, Deloitte Future of Automotive Mobility Study 2023
2025 | Monitor Deloitte

Key takeaways

- **Traditionally**, the sale of a **predictable number of cars** has been conducted through **dealerships**.
- In the future, **the number of usage-based, customer-centric business models** like leasing and subscriptions **will grow**.
- **Subscription, rental,** and **car-sharing** products alone are expected to **increase by 68%** by 2035.
- This shift will be accompanied by **new customer expectations**.
- **Business models are blurring**: Many OEMs, vehicle rental companies, and dealerships are now offering car subscription services.

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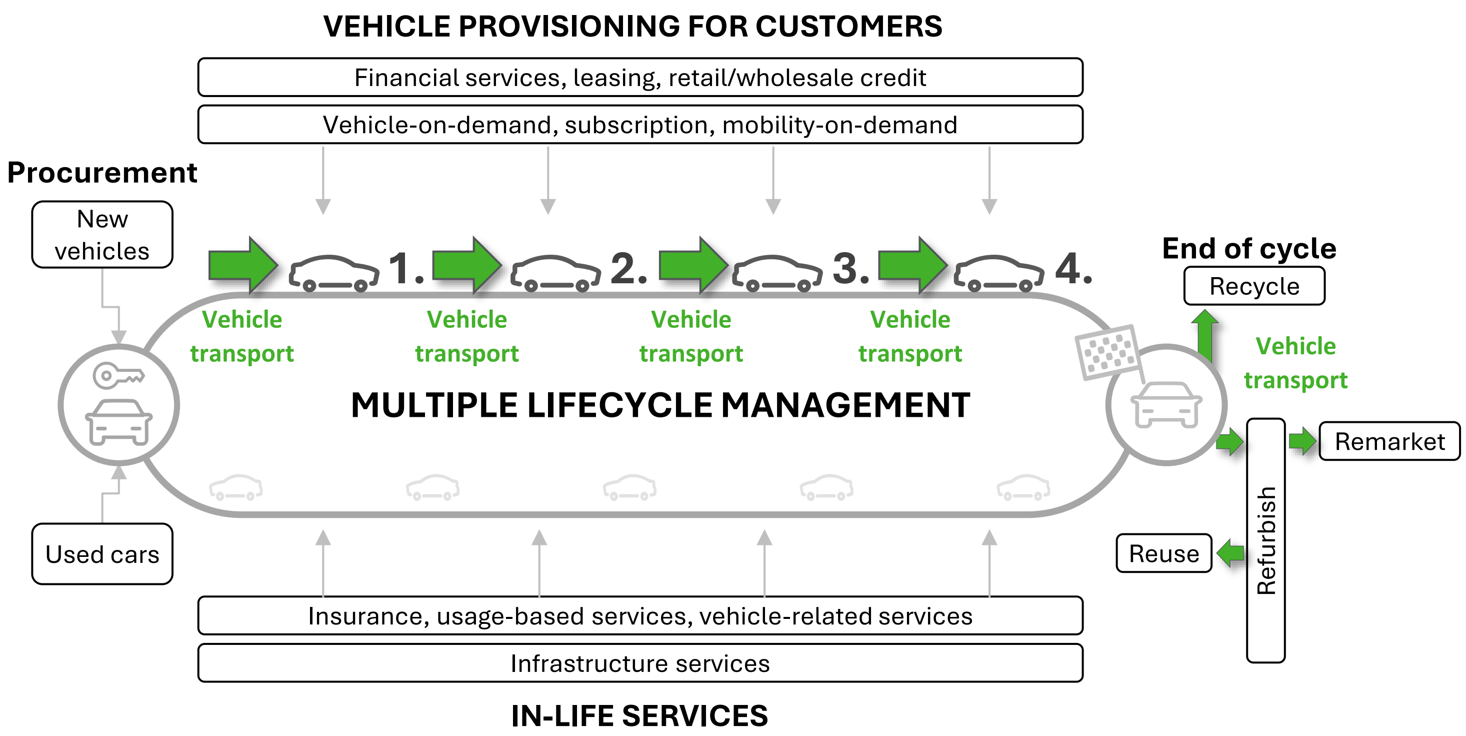
The evolution of individual logistics

Logistics as part of the value chain

Logistics enables the mobility of vehicles throughout the vehicle lifecycle and is therefore an integral part of the value chain.

Image 4 – Role of logistics in the vehicle lifecycle



Key takeaways

- Vehicles will have **multiple uses** over the course of their lifecycle.
- This will **increase the need for transportation** between the different vehicle uses in particular.
- **Customers expect flexibility** in these transfers, while for providers, they primarily represent a **cost factor.**

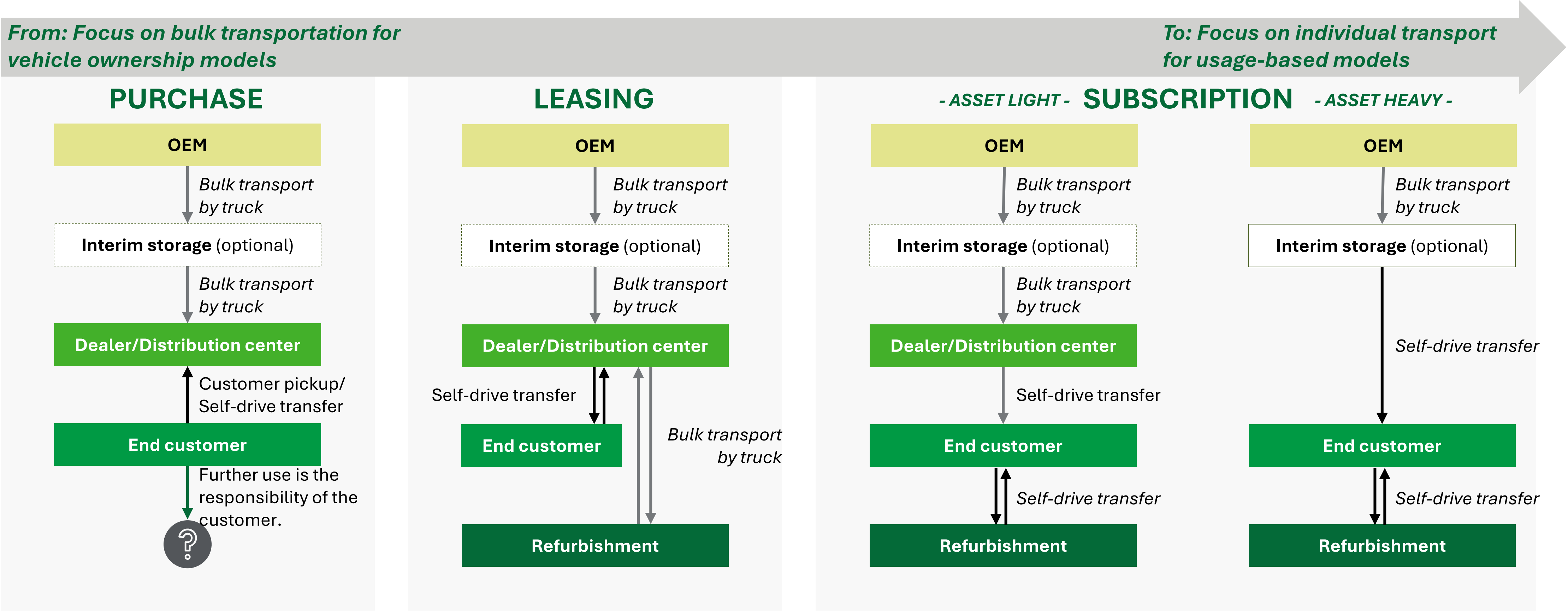
Logistics represents a key factor throughout lifecycle management.

Source: Deloitte Future of Automotive Mobility Study 2023

Importance of individual logistics for the new mobility landscape

The growing demand for individual solutions is driving an increased need for individual transport in vehicle logistics.

Image 5 – Different transport types for various models

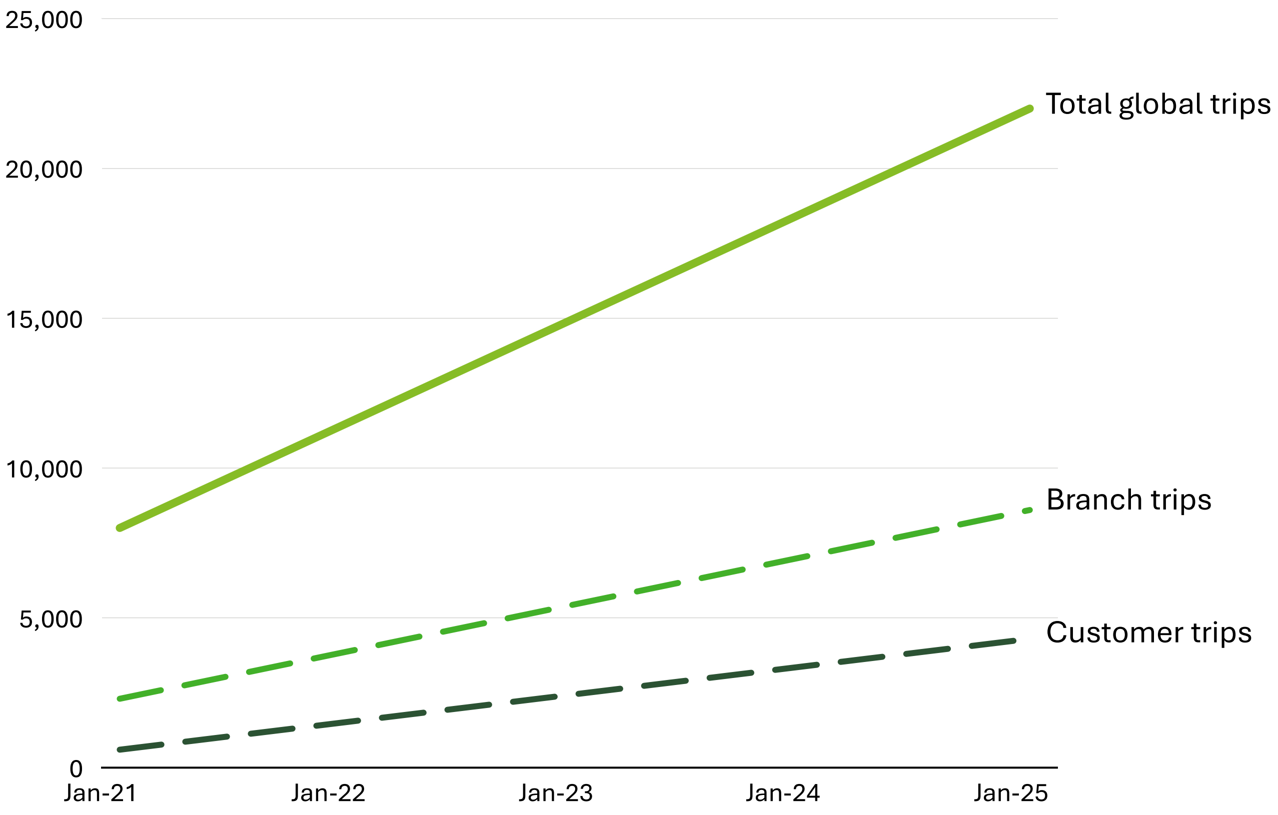


Source: Onlogist, Monitor Deloitte

Increasing demand for individual logistic solutions

The shift to subscription and leasing models requires a significant increase in individual transfers to the end customer and back to the dealer or OEM.

Image 6 – Development of demand for individual transport trips using the example of Onlogist (trips/month)



Source: Onlogist

Key takeaways

- **Global demand** for Self-drive transfer has nearly **tripled (+175%)** since 2021.
- During the same period, **customer trips increased by 617%.**
- The **share of total customer trips** rose from **7,5% to 20%.**
- In the area of **branch trips**, an **increase of 274%** was recorded, raising the share of total volume from 29% to 39%.

The **demand** for **individual transport is steadily growing** across all segments.

Strategic development of logistics

Future-proof logistics requires a tailored combination of in-house logistics resources and third-party providers, orchestrated through ERP software. Platforms support process optimization and the realization of cost-saving potentials.

Image 7 – Illustrative example for selecting the transport type based on a subscription model

Own logistics

\+ High level of control
\+ Direct management
\+ Employees in own team

– Higher personnel cost
– Low flexibility during peaks
– Admin effort required

Traditional third-party providers

\+ Reliability
\+ Experience and infrastructure
\+ Professional organization

– Higher costs
– Resource and capacity limitations
– Less flexibility with short-term changes
– Labor law uncertainties

DIGITAL INTEGRATION OF LOGISTICS SOLUTIONS

ERP integration

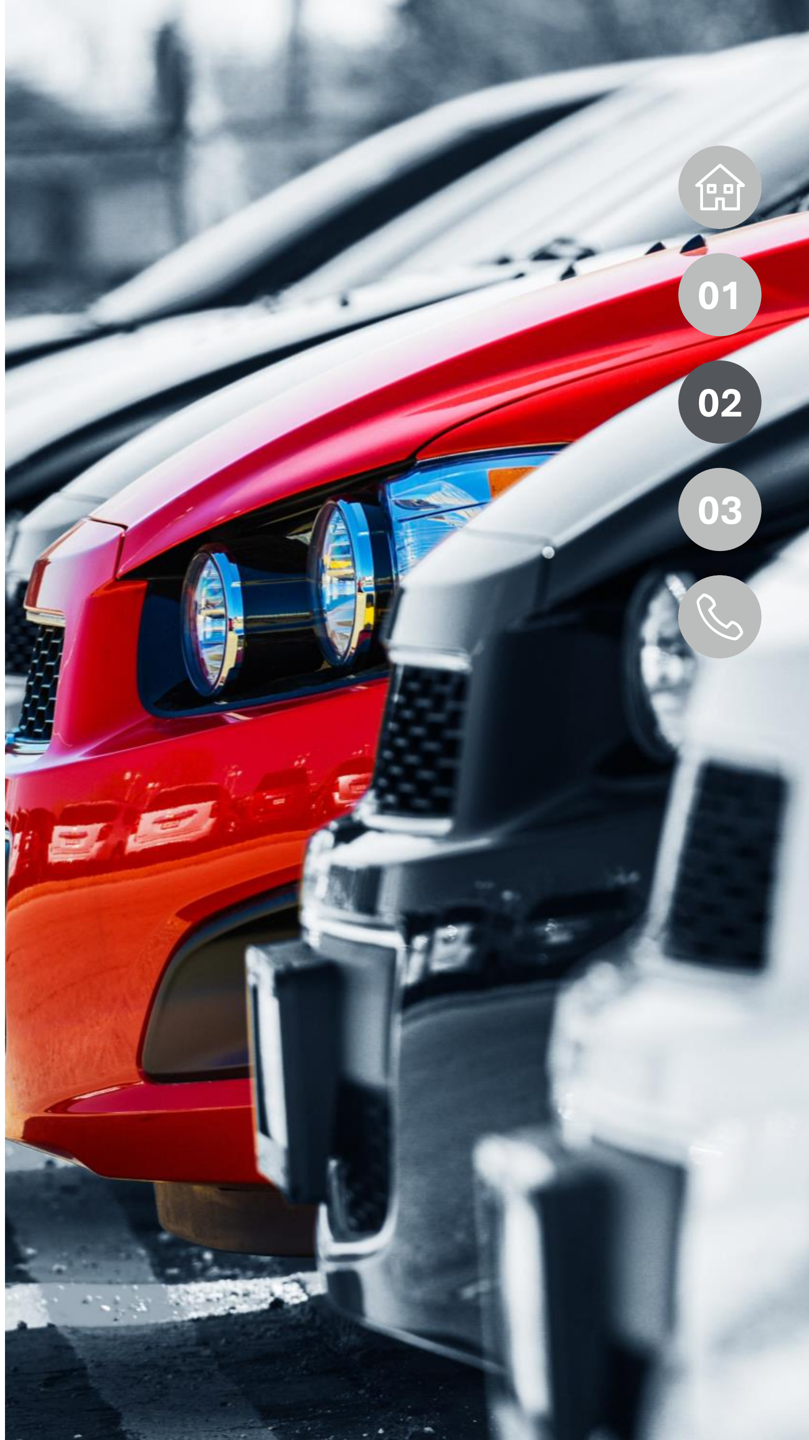
Logistics integration into the ERP system is the minimum requirement for process optimization.

Platforms/ intermediaries

Platform integration into the ERP system to achieve additional savings (approx. 30%) through synergy effects.

The **digital integration of various logistics products** into business processes is the key to efficient and competitive logistics.

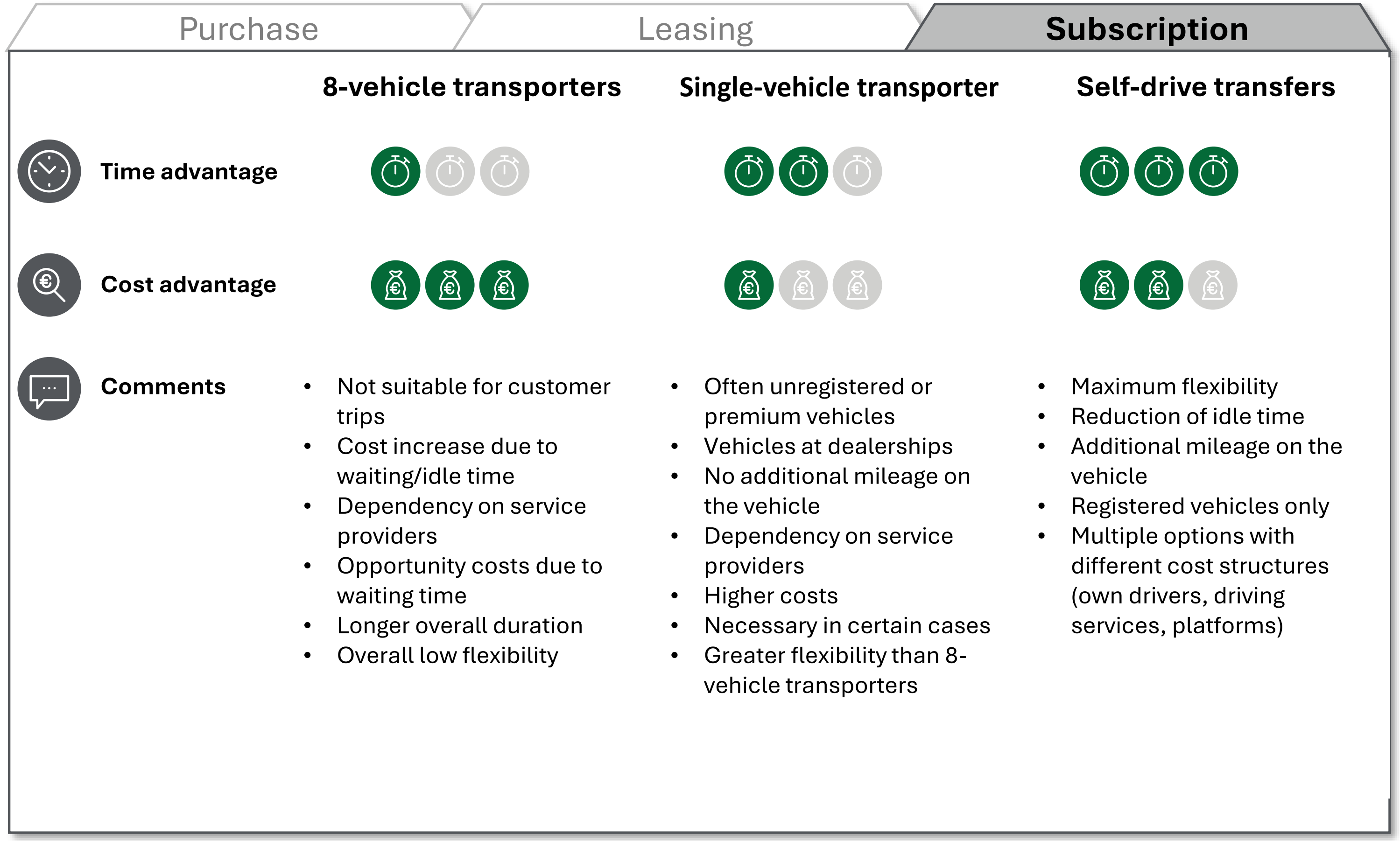
Source: Onlogist, Monitor Deloitte



The combination of logistics solutions as a success model

Self-drive transfers offer maximum flexibility and competitive costs, while 8-vehicle transporters are considered a cost-effective solution with waiting time, and single-vehicle transporters cater more to specific requirements.

Image 8 – Illustrative example for selecting the transport type based on a subscription model



Key takeaways

- 8-vehicle transporters are the **most cost-effective transport option**, but waiting time can increase costs.
- **Single-vehicle transporters are expensive** and are used only for specific requirements.
- **Self-drive transfers offer the greatest flexibility** and a competitive cost structure due to reduced transport distances.

Different logistics approaches are **suitable depending** on the **use case**, and must be selected on a case-by-case basis.

Summary

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Summary

Automotive mobility providers must rethink traditional logistics approaches: By strategically optimizing logistics processes with AI-based solutions, they can unlock new cost-saving potential, enhance customer satisfaction, and drive sustainable growth in an evolving market.

Image 9 – Summary and derived recommendations for automotive and mobility providers

Summary

- Trucks are an integral part of vehicle logistics. At the same time, their significance in the vehicle transport chain is increasingly shifting, particularly toward fleet integration.
- Precise and flexible vehicle transport is becoming increasingly important in leasing and retail.
- Scalability is a key factor for business growth, whether it involves expanding operations or meeting increased demand.
- Short-term branch transfers are essential for new mobility solutions to minimize idle time and maximize fleet utilization.
- Technologically advanced platform providers integrate seamlessly into their customers' processes.

Recommendation

- **Automakers and mobility providers should adapt their logistics strategies to emerging mobility trends.**
- **Digital transformation must be advanced, and processes must be strategically optimized.**
- **Efficient and AI-based logistics management increases profits and customer satisfaction while ensuring sustainable growth.**

Source: Onlogist, Monitor Deloitte

Key Takeaways: Logistics as a critical driver for future success

#1

The **automotive industry** is experiencing a decline in vehicle ownership caused by **trends like usage-based offerings and subscription models**, creating new logistical requirements and opportunities.

#2

Logistics is an **integral part of vehicle lifecycle management** and must adapt to the increasing demand for tailored solutions and self-drive transfers to remain competitive. The key lies in **combining different transport modes.**

#3

Future logistics strategies must strike a **balance between traditional providers and more flexible, platform-based solutions** to maximize efficiency, scalability, and customer satisfaction through tailored digital solutions.

Contacts

Please reach out to our experts if you have any questions!

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