

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

01

Future of mobility

02

The evolution of individual logistics

03

Summary



Contacts



01

02

03



Future of mobility



01

02

03



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

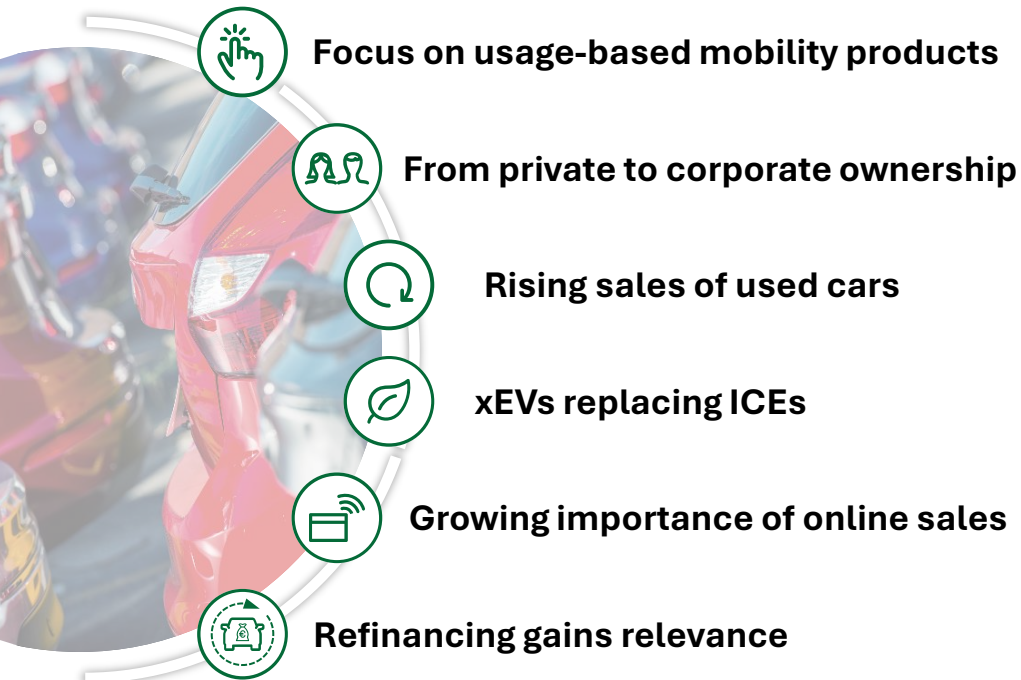


Image 2 – Changes in the automotive mobility landscape

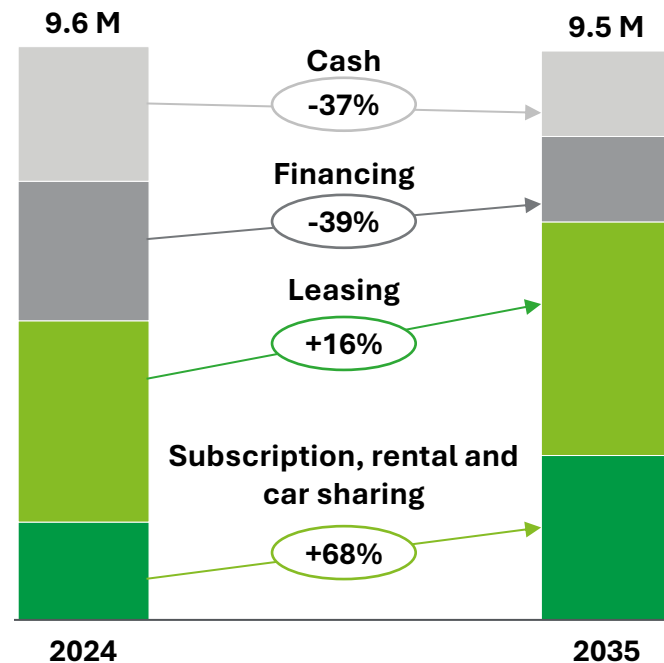
From...		To...
Asset financiers	➤	Asset managers
Lifecycle management	➤	Multiple lifecycle management
Sales focus	➤	Relationship focus
Transactional	➤	Customer experience
Standardized	➤	Personalized
Reactive	➤	Proactive
...	➤	...

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.

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)



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.
- **Revenue from subscription, rental, and car-sharing** products alone is 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.



01

02

03



The evolution of individual logistics



01

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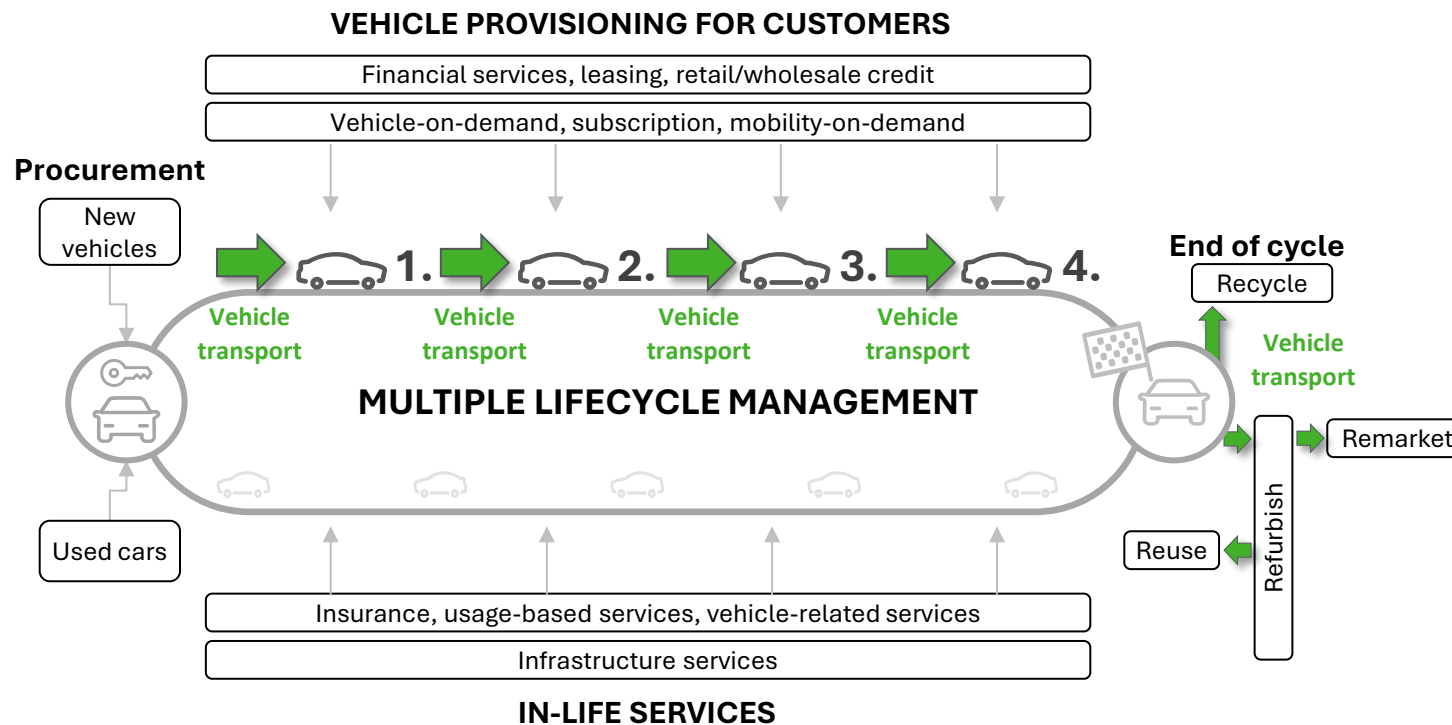
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Logistics as part of the value chain

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.



01

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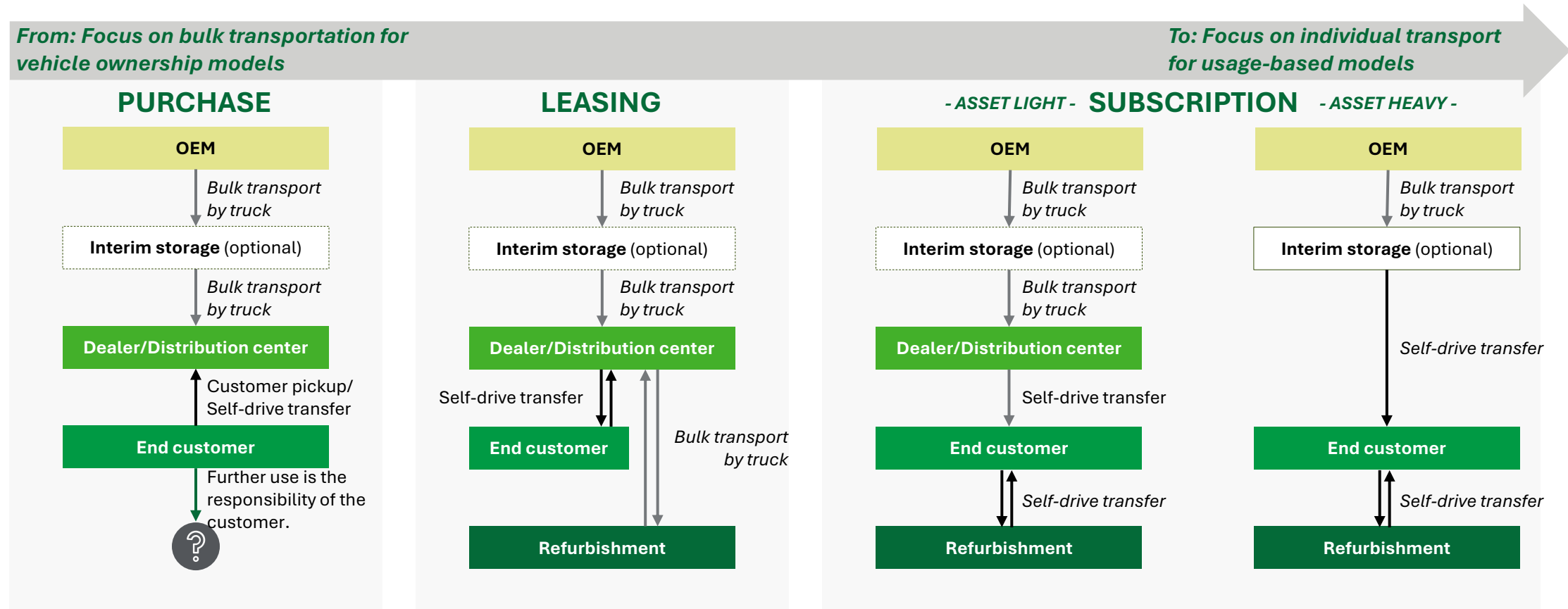
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Importance of individual logistics for the new mobility landscape

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

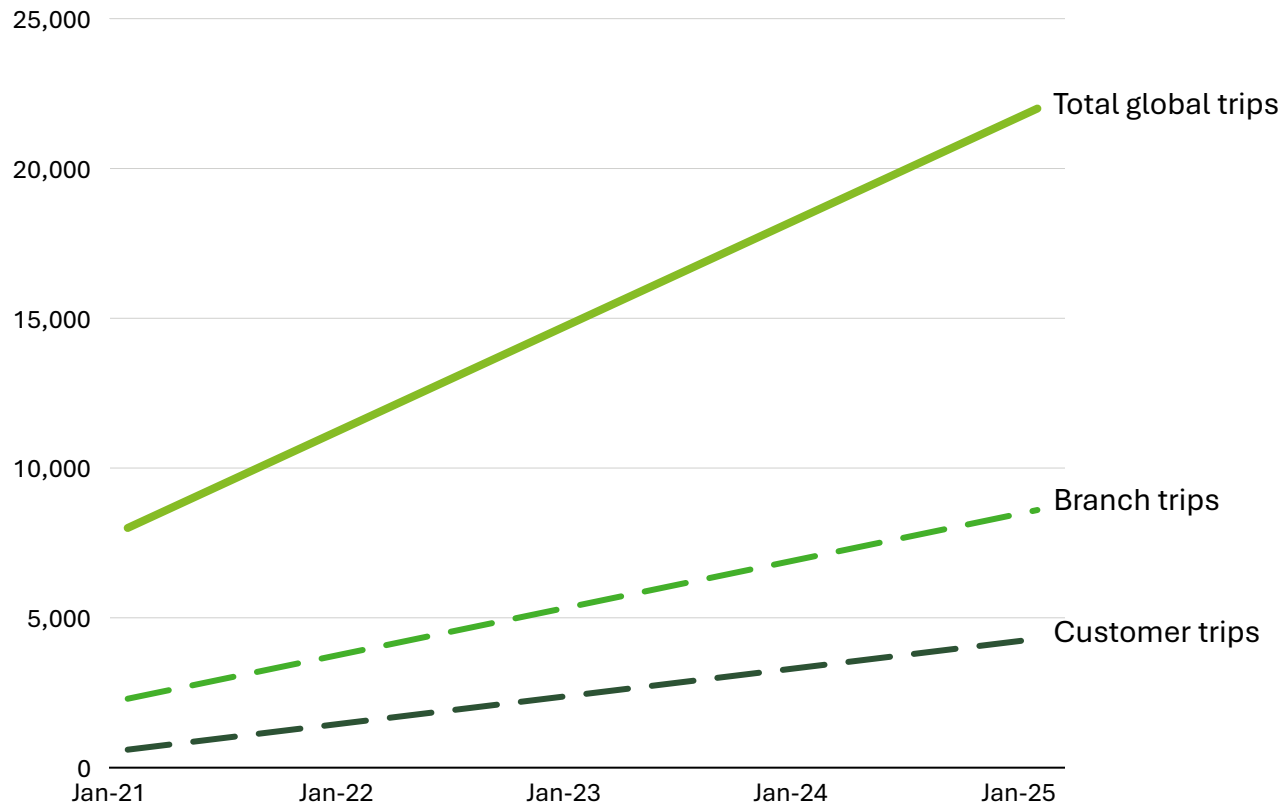
Image 5 – Different transport types for various models



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
2025 | Monitor Deloitte

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.



01

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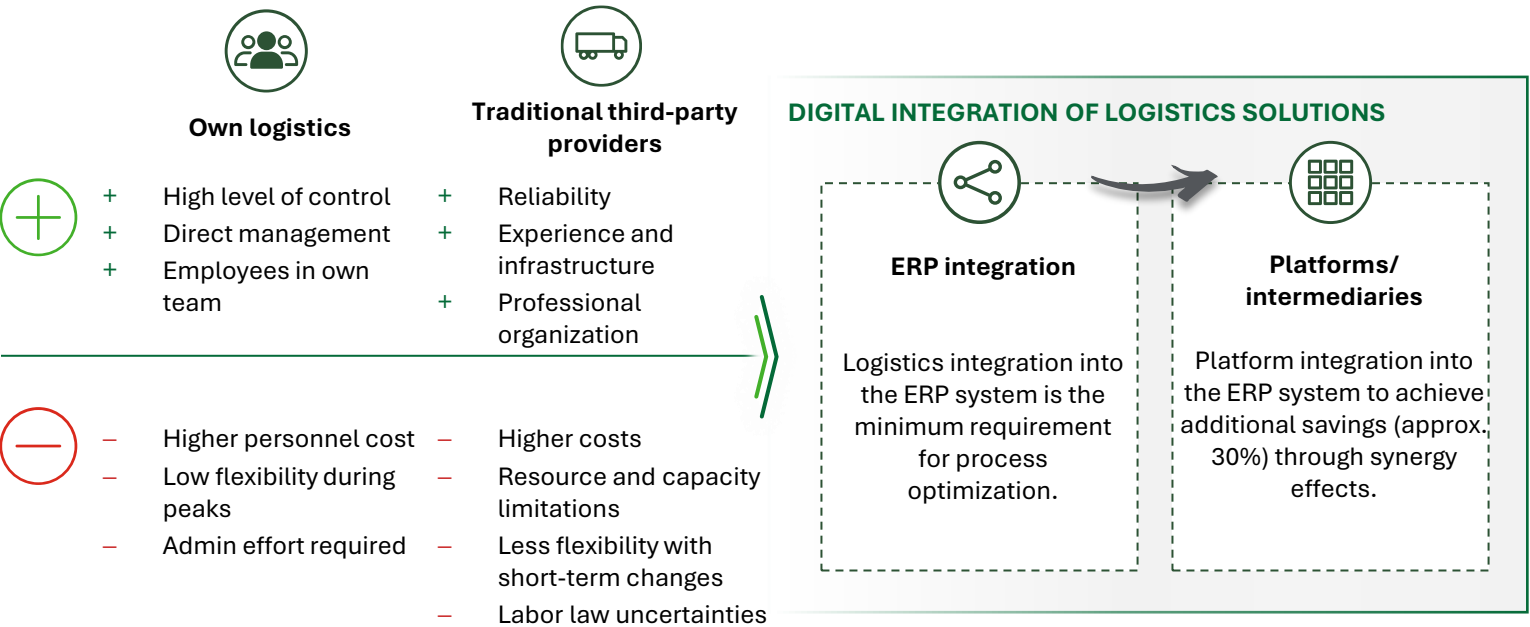
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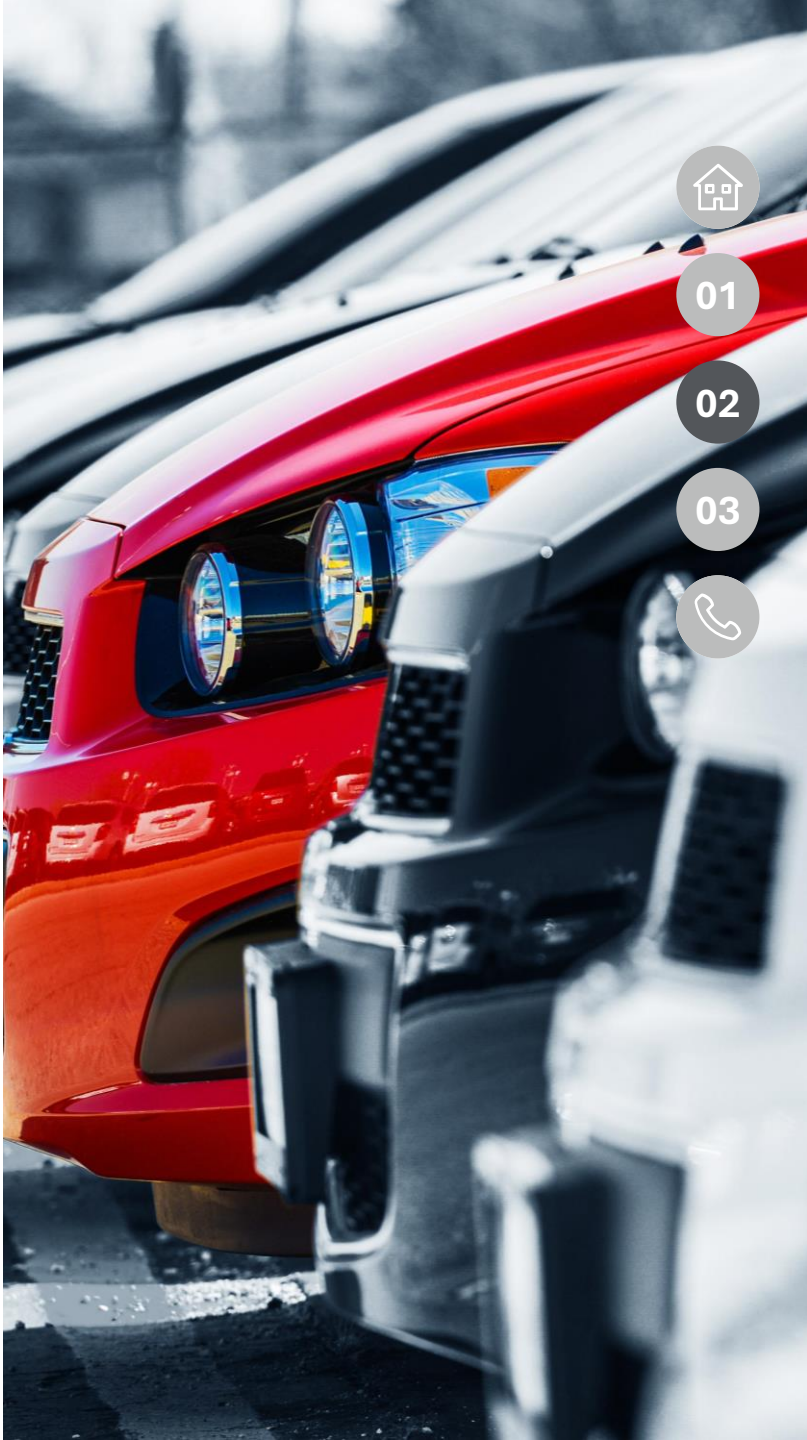
Strategic development of logistics

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
























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



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

	Purchase	Leasing	Subscription
	8-vehicle transporters	Single-vehicle transporter	Self-drive transfers
 Time advantage	  	  	  
 Cost advantage	  	  	  
 Comments	<ul style="list-style-type: none">• Not suitable for customer trips• Cost increase due to waiting/idle time• Dependency on service providers• Opportunity costs due to waiting time• Longer overall duration• Overall low flexibility	<ul style="list-style-type: none">• Often unregistered or premium vehicles• Vehicles at dealerships• No additional mileage on the vehicle• Dependency on service providers• Higher costs• Necessary in certain cases• Greater flexibility than 8-vehicle transporters	<ul style="list-style-type: none">• Maximum flexibility• Reduction of idle time• Additional mileage on the vehicle• Registered vehicles only• Multiple options with different cost structures (own drivers, driving services, platforms)

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.



01

02

03



Summary



01

02

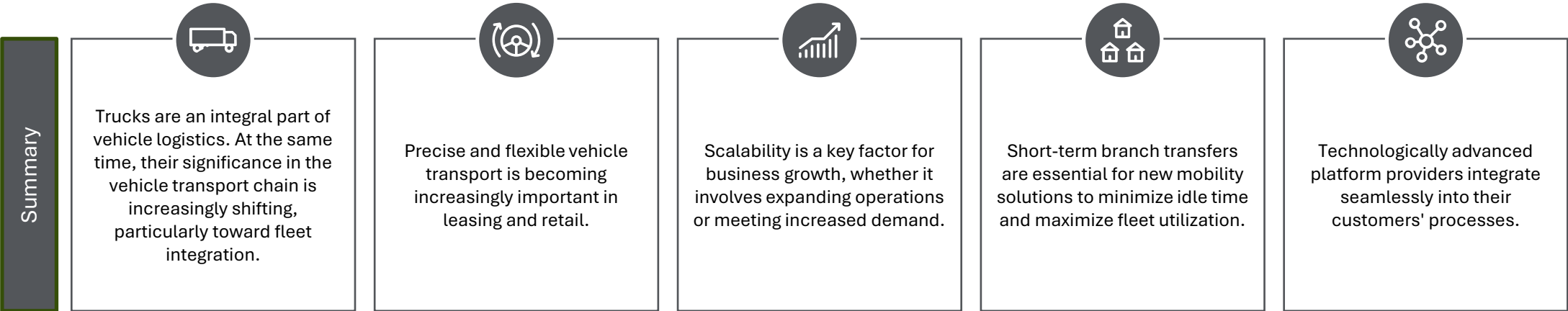
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Summary

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



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.



01

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

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