

DEVELOPMENT VECTORS OF THE MARKET OF TRANSPORT AND LOGISTIC SERVICES

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Abstract

Introduction of modern logistic management allows to accelerate turnover of the capital, to reduce product cost and services, to reduce costs of distribution of products. In this regard the perspective direction of increase of the transport companies efficiency is expansion of application of new logistic management approaches in their activity.

In paper the tendencies influencing development of the world market of transport and logistic services are revealed. The reasons of a crisis of the Russian transport and logistic market are established.

The following opportunities for development of the transport and logistic companies are proved: expansion of use of new logistic tools and technologies: services on-demand, e-commerce, improvement of strategic marketing activity.

Thus, in paper the problem field of modern logistic management as factor of innovative development of transport and logistic complex is revealed. New instruments of strategic marketing which introduction in practical activities of economic subjects of a transport and logistic complex will allow to increase efficiency of their business processes are offered and to increase their importance in the international transport and logistic system

Key words: logistic management, on-demand service, e-commerce service, complex logistic decisions, strategic management

JEL Code: R 40, R 41, L 91

Introduction

The attention to logistics as in Russia, and is abroad caused by that traditional reserves of competitiveness increase such as quality, the prices, and also the marketing approaches connected from orientations of productions to market sputtered out. As foreign practice confirms, reduction of logistic costs for one percent is equivalent to almost ten-percentage growth of output. Practical application of modern logistic management technologies forms

possibilities of acceleration of the capital turnover, decrease in product cost and services (Bonami & Lejeune, 2009), reductions of expenses on distribution of goods (Ben-Tal & Nemirovski, 2002).

The organizations functioning in the sphere of transport reach leader positions on a target segment of the market if they are capable to develop and introduce effective logistic business processes (Marx, Gans & Hsu, 2014), to structure needs of clients and to define effective ways of their satisfaction (Carayannis & Grigoroudis, 2014), reaching the highest value, quality and service (Onetti, Zucchella, Jones & McDougall-Covin, 2012). In the conditions of constantly changing inquiries of buyers, technologies and a competitive environment the survival of the organization directly depends on that, how successfully the organization develops and introduces effective logistic business processes (Huang, 2007), (Pajares & López-Paredes, 2011).

The goals of the paper purpose are to reveal a problem field and development prospects of the modern transport and logistic services market and to prove new instruments of logistic management for growth of efficiency of the transport and logistic companies. In paper the following research methods will be used: comparison, analysis of statistical information of the World bank, of the Ministry of Economic Development of the Russian Federation, Federal State Statistics Service of Russia.

1 Research of the market of transport and logistic services and prospects of its development

According to the World bank, in 2017 growth rates of world economy were slowed down to 2,8%. In the developed countries GDP growth made 1,8%, including in the USA – 2,2%, the EU – 1,6%. Economic growth in developing countries remained more dynamic, than in developed, however its rates decreased from 4,2% in 2014 to 3,5% in 2016 (World Bank, June 2016). Among the main reasons the international experts call: falling of the prices of raw materials; devaluation of national currency; unbalance of the budgetary sphere; high inflation and deficiency on accounts of the current operations – the imbalances created in years of the economic growth stimulated by crediting.

Among the long-term tendencies of development of world economy and trade capable to change dynamics and the direction of freight traffics in the international message, it is possible to allocate the following: low growth rates of world economy and trade, low prices of raw materials, high volatility of the financial markets, reduction of volumes of foreign trade

and inflow of the capitals to developing countries; reorientation of the capitals from the markets of developing countries on the markets of the USA; configuration change of world trade and global chains of deliveries; delay of growth rates of the Chinese economy; low growth rates of production and consumption in the countries which economy substantially depends on export of raw materials.

In developing countries significantly lower dynamics of growth, than that is predicted that it developed in the previous five-year period, in view of the low prices of raw materials and in general low dynamics of world trade and demand from the developed countries, reduction of inflow of the capitals, deterioration of financial conditions and need of more rigid consolidation of the state budgets. Growth of developing countries in 2017-2018 is expected at the level of 4,4 - 4,7% (World bank, June 2016).

The world market of transport and logistic services is fragmented, more than 50 thousand operators act on it, over 95% from them are rather small by the size and have limited material and financial resources. 36% of all sales volume fell to the share of 50 global companies dominating in the market in 2015.

In 2014 global cumulative costs of transport and logistics were estimated at \$7,7 trillion (about 10% of world GDP). The highest growth rates (over 30%) for the last decade were recorded in 2007 that was explained by rapid development of the Asian market, in particular China, and also some other countries, such as Russia, India, Brazil. 55% of world costs of transport and logistics are the share of a share of logistic outsourcing (actually the market of transport and logistic services in a format 2PL, 3PL, 4PL).

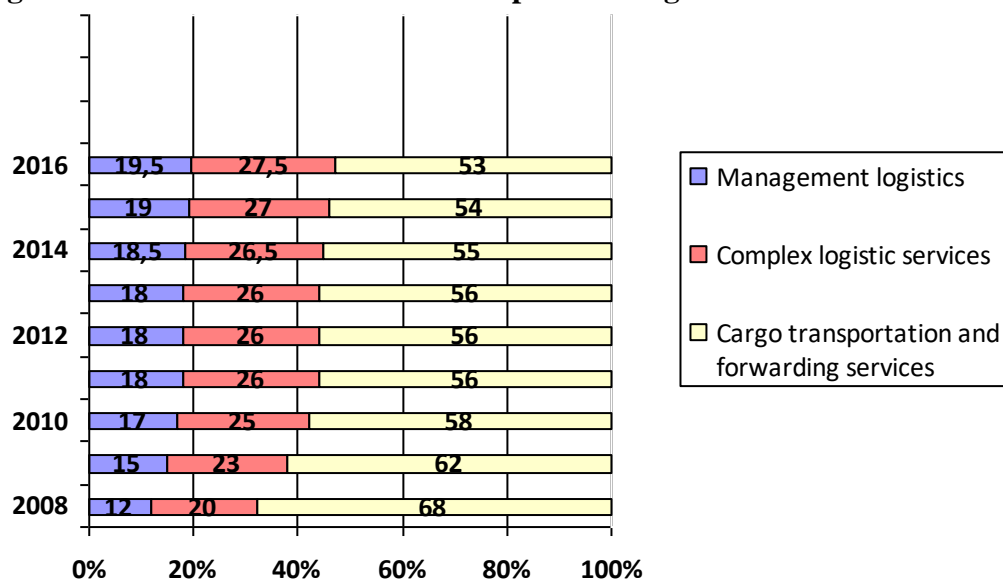
Among the major a tendency in the market of transport and logistic services it should be noted increase of demand for complex logistic decisions in the last decade from the companies and the enterprises that is directly connected with acceleration of transfer on outsourcing of warehouse and management services. Thus reduction of a share of transport-forwarding services in the total volume of the market of transport and logistic services (fig. 1) is noted.

The leading logistic companies along with the organization of transportations, rendering of services for cargo handling and warehousing of goods, provide also complex services in management of chains of deliveries within long-term contracts.

The perspective direction of development of the world logistic market is expansion of the large western logistic companies to developing countries. The following tendency is rather accurately traced: to the European operators the markets of countries of Eastern Europe and

the CIS are especially attractive, and for North American – the markets of the countries of Latin America. The companies of Asia-Pacific countries choose the markets of China and India. Orientation of strategy of the leading logistic operators to strengthening of presence and volumes of operations in Asia, including service of intra regional trade becomes the general trend on medium-term prospect.

Fig. 1: Structure of the market of transport and logistic services



Source: Ministry of Economic Development of the Russian Federation, Federal State Statistics Service of Russia

2 Capacity of the Russian transport and logistic companies

In Russia today the transport and logistic market experiences difficulties that is caused by declining production in the majority of sectors of economy, and, therefore, decrease in freight traffics; strengthening of the competition between different types of transport; growth of requirements from clients consignors to quality and completeness of service of the logistic operator, and also to the level of the transport and logistic expenses; vast Russian geographical scales, poor development of Russian infrastructure and fast-growing demand for transport and logistic services (tab. 1, fig. 2).

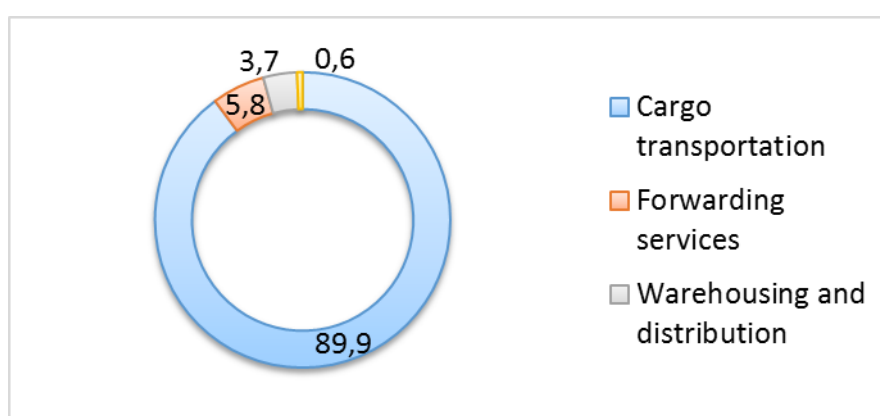
Tab. 1: Loudspeakers of the Russian GDP and market of transport and logistic services, 2009-2016, billion rubles, %

	2009	2010	2011	2012	2013	2014	2015	2016
<i>Russian GDP, billion rubles.</i>	38807,2	46308,5	55967,2	66926,9	71016,7	77945,1	80804,3	84345,7
Nominal growth	94,0%	119,3%	120,9%	119,6%	106,1%	109,8%	103,7%	104,4%

<i>Index deflator</i>	102,0%	114,2%	115,9%	108,3%	104,7%	108,9%	107,7%	104,6%
Real growth	92,0%	105,1%	105,0%	111,3%	101,4%	100,9%	96,0%	99,8%
Market of transport and logistic services, billion rubles.	1566,3	1884,3	2181,2	2492,2	2592,8	2642,6	2845,9	3084,8
Nominal growth	92,7%	120,3%	115,8%	114,3%	104,0%	101,9%	107,7%	108,4%
<i>Index deflator</i>	111,0%	110,9%	107,8%	105,9%	106,2%	102,7%	115,2%	108,9%
Real growth	81,7%	109,4%	107,9%	108,4%	97,9%	99,2%	92,5%	99,5%
Share of transport and logistic services in GDP, %	4,0%	4,1%	3,9%	3,7%	3,7%	3,4%	3,5%	3,7%

Source: Ministry of Economic Development of the Russian Federation, Federal State Statistics Service of Russia

Fig. 2: Structure of the market of transport and logistic services (2016)



Source: Ministry of Economic Development of the Russian Federation, Federal State Statistics Service of Russia

Follows from fig. 2 that in Russia the market of transport and logistic services is only formed, generally it is characterized by a format 2PL. The share of management logistics in total amount transportn-logistic услуг is insignificant (0,6%).

The Russian transport and logistic companies in the activity faces the serious threats of the negative changes of market conditions which are a consequence of an economic crisis, shown in decrease in sizes of the market of transport and logistic services, reduction of investments into logistic infrastructure.

Nevertheless, there are considerable opportunities for development of this company: expansion of use of new logistic tools and technologies. The services on-demand, e-commerce, improvement of strategic marketing activity concern to them.

Solutions of on-demand: management of transportation (decisions as in a complex solving problems of transport logistics, and in separate combinations), alternative logistics (transport networks which traditionally weren't considered as logistic operators, but

possessing the high potential of the solution of logistic tasks), management of a warehouse (the decision intended for automation of the account and traffic control commodity), planning (it is necessary to expect development of decisions in the field of strategic and tactical planning, in the field of forecasting) (Roy, 1952).

The perspective direction of technological and available logistics is e-commerce. This direction includes: retail networks (an entry into the new markets, delivery Uberization, planning of purchases and search of suppliers on B2B-platforms), small wholesale and sellers (access to a wide range of potential clients out of a target segment, access to a complex of the logistic services earlier available only to large market players), the logistic operator (satisfaction of complex inquiries of "turnkey" logistics, efficiency of service due to consolidation of volumes, integration not only in the sphere of operating activities, but also within strategy of growth of partners), producers (transition to direct sales in the B2B and B2C segments, passing traditional, delivery Uberization, cooperation with marketplaces and other providers of services of "alternative logistics").

In modern conditions for participants of the transport and logistic market research of sources of competitive advantages as decisive factor of preservation and strengthening of their position in the market, growth of financial and economic activity efficiency and innovative development is of great importance (Gorohova, Sekerin & Šafránková, 2014). Therefore it is advisable to investigate the potential of strategic marketing for increase of efficiency of transport logistics

3 Use of potential of strategic marketing for increase of business' processes efficiency in transport logistics

Among the directions of improvement of strategic marketing in transport logistics are offered: development of strategic communication marketing, formation and improvement of tools and procedures of search of opportunities of increase in demand, development of value of the offer.

Communicative strategy is one of important effective ways of management of interaction between brands and consumers (Šikýř, 2015). For the transport and logistic company creation of the correct positioning of the products plays large role in definition of target audiences, the direction of development, a choice of types of products and the prices.

Strategic planning of advance of new goods demands use of media strategy which has to include the different directions of communications: advertizing, public relations, direct marketing, and also strategic analysis of advertizing space.

Mobile marketing is actively developing direction of marketing. The basis of mobile marketing is made by a wide number of interactive wireless devices such as the smartphone, the mobile phone, the tablet computer, the netbook, the laptop and others. For them the person, portability, convenience, possibility of use from any location, possibility of connection to the Internet is characteristic. Use of mobile devices as significant communication channel is caused by change tendencies of consumption media of consumers' target groups. In the majority of marketing communications they are used along with other media channels as auxiliary media. Most often together with the Internet, social media and television.

It is possible to carry to factors of mobile marketing growth: high coverage of audience mobile devices; constant availability of target audience; rapid development of mobile and Internet technologies; dynamically growing coverage of the mobile Internet; growth of electronic commerce; growth of number of smartphones and tablets.

Components of mobile marketing are diverse and find the application not only in different advance of the benefits, but also in other directions of marketing.

In analytical reports of many research companies including WARC is noted that the defining factors of marketing budget growth of in 2016 in the world are an Internet and mobile media. Domestic experts expect prospects and explosive growth of mobile marketing many years, but objective results began to be traced only now. It is possible to carry to key limiting factors: lack of the independent measuring instrument of the market; lack of experience and knowledge of the market participants; lack of high speed of data transmission in certain territories.

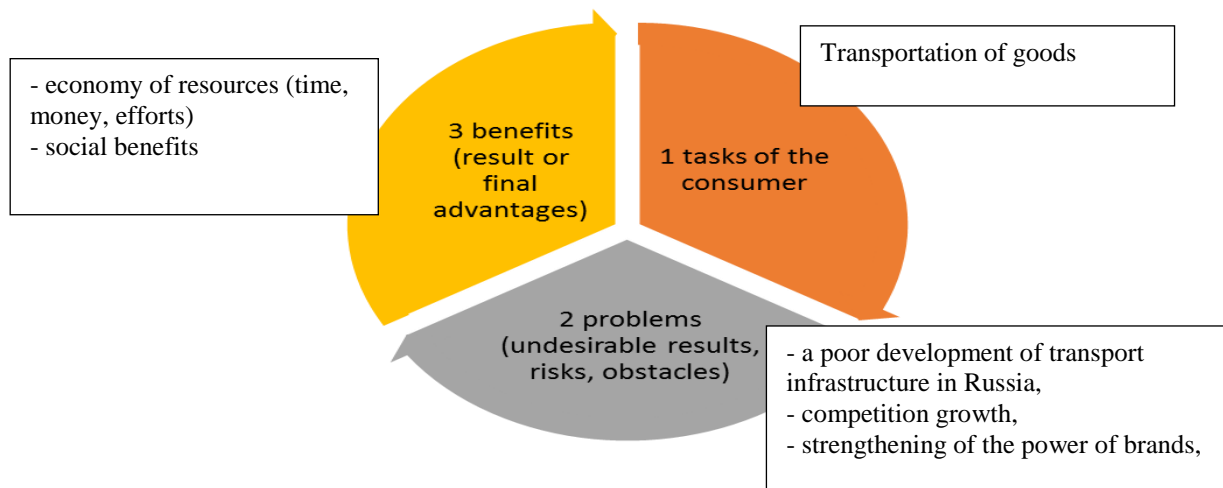
The template for drawing up a profile of the consumer of transport and logistic services allowing to specify understanding from the company of the consumers is developed and approved (fig. 3).

This template is formed in three stages: formulation of the consumer tasks, the description of problems at product consumption, systematization of results and advantages which the consumer of transport and logistic services wishes to receive.

The following search directions of growth opportunities of the rendered transport and logistic services are revealed:

- the accounting of the existing shortcomings of transport and logistic services (according to their contents) – their not adaptability (Barykin & Smyslov, 2018),
- the accounting of the existing shortcomings of transport and logistic services (in their form of granting) – weaknesses of a marketing network,
- the accounting of the existing shortcomings of transport and logistic services (on their level of coverage and penetration).

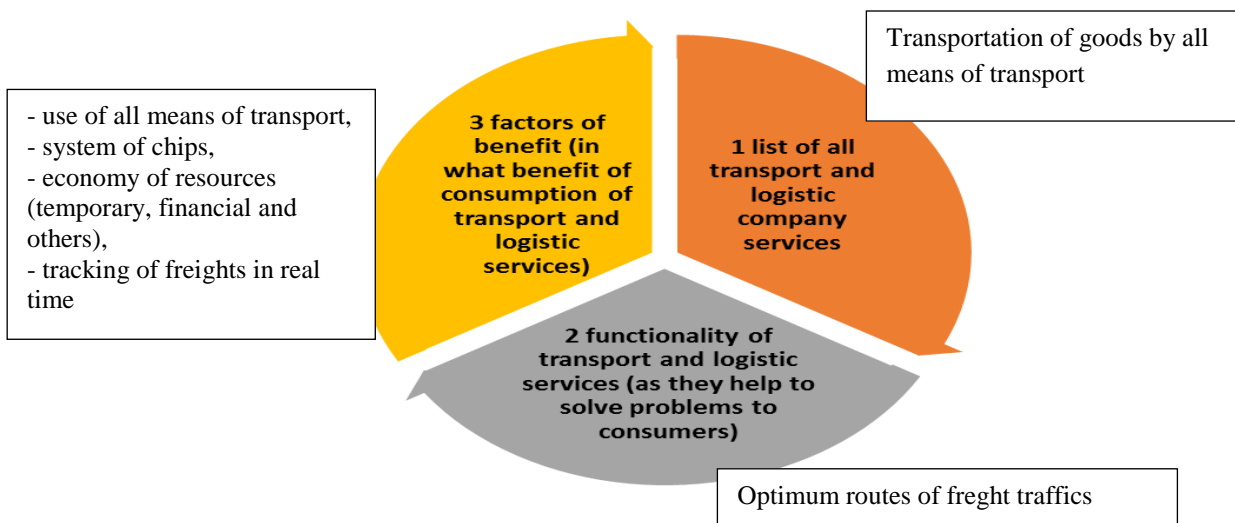
Fig. 3: Example of the consumer profile of of transport and logistic services



Source: authors

The algorithm of formation of the value card of transport and logistic services allowing to increase controllability them value is developed and approved (fig. 4).

Fig. 4: Example of the value card of transport and logistic services



Source: authors

The algorithm consists of three stages: drawing up list of all transport and logistic company services, description of their functionality, reflection of benefits from consumption of transport and logistic services

Conclusion

Thus, in paper the problem field and development prospects of the modern transport and logistic services market are revealed, new instruments of logistic management which introduction in practice of the transport and logistic companies will allow to increase efficiency of their activity are offered.

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