

THE PERSPECTIVE TRENDS IN THE DEVELOPMENT OF THE LOGISTICS SERVICES MARKET IN RUSSIA: RAIL TRANSPORT

Abstract. An urgent issue in the development of logistics in Russia is the improvement of the supply of goods by rail. This is due to the influence of many external factors: the complication of the geopolitical situation, the introduction of economic sanctions against Russia, the loss of old and the opening of new territorial markets, as well as the emergence of new directions of transportation. At the same time, the need to maintain and improve the quality of logistics services remains. The study results presented in the article are based on official statistical sources and press data and represent an overview of the main trends in rail transport, considering the prospects for contract logistics.

Keywords: market of logistics services, branded transport service centres, contract logistics

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Introduction

The development of logistics management is becoming an urgent problem for enterprises in the Russian economy. In the period 2010-2020, a lot of scientific works were devoted to the issues of logistics management of industrial complexes, solving the problems of value formation in supply chains, creating economic and mathematical models for managing logistics processes, as well as optimizing the delivery routes of groupage cargo [1,2]. The conditions of the two-year pandemic from 2020 to 2022 and the aggravation of the geopolitical situation that followed it caused the need for changes in the formation of delivery routes and the reorganization of existing supply chains.

The political events of 2022 forced many Russian enterprises to reconsider not only the value chains that had been formed and functioned for a long period but also the entire strategy for the supply of raw materials and the sale of finished products.

The change in the balance of power in the competitive market of logistics services, and the departure of transport and logistics companies from the international level forced enterprises in various industries to change their views on the basic principles of logistics management and the formation of a business model. If the basic logistical principle of two decades in the Russian economy was the "just in time" principle, which stipulates the introduction of information systems that support JIT ("just-in-time") in production, then the events of the last three years have persuaded manufacturing enterprises to pursue a policy of increasing the reliability of supply-sales processes and the formation of the necessary stock in production.

One of the growth points of large industrial enterprises in the field of logistics technology has been the rejection of the services of third-party logistics companies when sending products, building up and using their own logistics potential, up to the formation of their divisions, and the acquisition (or absorption) of transport companies.

Experts in the development of the logistics market in Russia, practitioners and scientists note several basic trends within which the logistics services market will develop in 2024 [3,4,5].

These are:

- digitalization of logistics processes and the introduction of electronic document management in the transportation process;
- development of management logistics in Russia, including in the sector of aggregation of requests for the delivery of goods for legal entities and individuals;
- development of cargo delivery in the sector of e-commerce and domestic retail
- search for ways to reduce the logistics cycle by accelerating delivery "on the last mile";
- shifting the focus of transportation in the direction of the countries of the Eastern Bloc.
- development and/or re-equipment of the material and technical base of transport and logistics operators in terms of updating the truck fleet and changing the supplier.

A little more about each of them.

The main trend in the development of the modern economy is the digitalization of business processes, including logistics processes. International requirements for the organization of logistics processes have also affected the area of rail transportation, where additional requirements for cargo, the introduction of electronic document management, and an increase in the cost of transportation have become problems. The length of the territory of Russia, and the lack of navigation in the winter period determines the high share of the presence of railway transport services in the transportation process, which explains the need to regulate and improve the efficiency of transportation in the framework of the implementation of state programs and projects. In particular, such projects include the implementation of the Comprehensive Plan for

the Modernization and Expansion of the Main Infrastructure.

The introduction in 2022 of the State System of Electronic Transportation Documents, which made it possible to speed up the processing of orders (issuance of consignment notes, delivery orders, and work orders), continued to develop in 2023 and already allows issuing bills of lading, requests and transport contracts. Thus, the introduction of an electronic document management system on the railway, as one of the prerequisites for reducing the logistics cycle time, became mandatory in 2024, when the process of adaptation of the participants of the transport process to the use of uniform electronic documentation becomes complete. Among other things, from 2024, the paper format of approval and registration of logistics processes will be moved to the online registration system of Rosdormonitoring, which will speed up the overall flow of documents [3].

Another direction in the field of digitalization is the development of management logistics in the sector of organizing cargo transportation for individuals and legal entities. A very fragmented market of transport and logistics operators, its reorganization in the period of 2021-2022 required a new look, both at the choice of multimodal transportation partners and at the level of organization of international supply services [6]. With the withdrawal of key logistics operators from Germany, France, and Sweden from the market, Russian companies have assumed the role of supply chain management. This caused serious growth in the management logistics sector, which for a long time did not exceed 5-7% of the total set of logistics services, and during the period of sanctions in certain regions, supplies increased to 15% [6]. Today, the attention of practitioners is drawn to the information and electronic resources developed in the field of logistics, which contribute to the digital consolidation of consignors and consignees and to form an agreement based on the application of consumers. This approach allows to increase the commercial income of logistics companies and compensate for the losses of 2022, which in general in the market of transport and logistics services amounted to 6.3% [4].

In July 2022, the fifth package of sanctions came into force, in connection with which there was a need to search for new contracts abroad and stimulate demand in the domestic market. For this reason, in order to preserve the functioning of the internal market, measures were taken to keep tariffs on transport services. In general, the increase in the cost of tariffs for all modes of transport in 2022 amounted to about 1.6% and partially compensated for the loss of freight turnover.

The application of economic sanctions against Russia and the rise in the cost of transportation that arose in connection with this could not but cause response measures related to the transportation of imported goods and import substitution in general. Thus, the Government of the Russian Federation initiated an increase in the utilization fee for imported vehicles produced by foreign partners in Russia (dump trucks, trailers and semi-trailers).

The period of the pandemic in Russia significantly influenced the change in consumer demands and the growth of domestic retail, so one of the trends in the Russian economy in the field of supply chain management

remains the development of e-commerce in the retail sector, which is very effectively supported by domestic carriers. Interregional delivery of goods is carried out mainly by forming groupage cargoes on railway transport, and delivery "to the door" - by road transport. The organization of supply chains in the field of providing retail trade with transport services necessitates the development of a vehicle fleet within the country. The introduction of restrictive measures for the implementation of transport services in many European countries has actualized the task of replacing and / or modernizing vehicles.

So, in Poland, the rates of electronic tolls for owners of vehicles weighing more than 3.5 tons were increased, in Germany the toll was increased for all classes of cars, in Spain about 150 zones were created with a restriction on the movement of low-class environmentally friendly vehicles. In general, the implemented measures can increase the cost of services by 15% [5]. This fact necessitates either replacing delivery routes with logistics operators (where possible) or adapting the existing fleet to the requirements of working under sanctions and restrictions.

The key issue in the development of logistics in Russia is the change in the vector of transportation from West to East. According to the analytical data of Eurostat, in 2022, deliveries from European countries to Russia decreased from 7.3% to 5.4% [5]. Compensation for losses in international trade occurred due to the strengthening of Russia's trade relations in the eastern direction and an increase in imports from such countries as China, Turkey, the United Arab Emirates, Azerbaijan, Belarus, Armenia, and Kazakhstan. Under this, the geography of traffic flows to the south and east has changed, and due to the reduction in the use of water and air transport, the share of rail and road transport in the structure of cargo turnover has increased.

Based on the foregoing, we can conclude that in the context of economic sanctions and taking into account the growing influence of the factor of digitalization of logistics processes in Russia, the contract logistics market will grow in the coming years. Transport Intelligence predicts the growth of the contract logistics sector in 2024 by more than 3%, including in the direction of the Asia-Pacific countries, the supply growth will reach 5.7% [5,6].

As mentioned above, railway transport plays a special role in ensuring the transportation of goods in the field of contract logistics. In 2022, there was an increase in export traffic of the "other cargo" category with an increase in the eastern direction of up to 15%, an increase in container traffic by more than 29%, and ferrous metals by 4%. According to the review of the Gudok newspaper, 276 million tons of cargo were transported in the direction of the Eastern polygon, while the share of transportation to China was almost 45% [7].

The management of JSC "Russian Railways" pays special attention to the activities of the Centers for Branded Transport Services (CFTS), where new projects are being promoted:

- interaction with Russian Post JSC (sending container trains); a project to increase the speed of delivery and the regularity of shipments through interaction with large retail companies M-video, Lenta, DNS, OZON, and Sportmaster through the introduction of

an individual wagon exchange technology (acceleration on the "first" and "last mile");

- introduction of a service of piggyback transportation from the Far East and an alternative transportation service of the same direction (partners LLC Management Company Elgaugol and JSC Uralugol);
- project for the implementation of a service using the loading of goods in containers (China-Russia) with the partnership of RZD Logistics JSC;
- implementation of the project of digitalization of the client's information stand when placing goods on one site within the Far East CFTTO.

However, JSC Russian Railways today is solving the issues of organizing logistics processes for the delivery of certain types of cargo, in particular bulk cargo. Currently, it is necessary to develop regulations for the preparation of cargo and ensuring their storage in terminals. Thus, many logistics infrastructure management issues remain unresolved. The creation of railway terminals for the storage and preparation of goods will require additional investment in the infrastructure complex of the Eastern Range, as well as terminals for the formation of trains.

Conclusion

Summarizing the presented material, it should be noted that in Russia there are scientific developments created in the period of 2010s-2020s aimed at solving the issues of organizing the logistics process in railway transport, which become relevant in the context of the digital transformation of the economy. Some of them have already been implemented, some are yet to be implemented. Among them, the most relevant for adaptation and / or development are inventions in the field of management logistics, and contract management in the market of legal entities and individuals.

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