

ГЛОБАЛІЗАЦІЙНІ ТА ІНТЕГРАЦІЙНІ ПРОЦЕСИ

GLOBALIZATION AND INTEGRATION PROCESSES

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TRENDS IN THE GLOBAL MARKET OF LOGISTICS SERVICES

The article focus on the problems of globalization of logistics services market. Specifically studied essence of the logistics, characteristics of the genesis of the concept of logistics in its evolutionary development are given. The main factors influencing the market of logistics services have been identified, namely, the globalization of the world economy and scientific and technological progress, which puts new demands on the quality of logistics services by their customers. It is proved that global logistics functions under the same laws as national logistics, but has its own specificity, which is due to the requirements of the world market, in particular: it is characterized by a longer operational cycle; contains more complex logistics operations; puts increased demands on information systems; causes the combination of logistics processes with marketing technologies. It is established that the modern logistic concept is based on interrelated, close relations in the field of functional, institutional and instrumental aspects of physical circulation of goods. Based on the analysis of the main trends of globalization of logistics markets, it is concluded that in the modern world, globalization is the main trend of development of macrologistic systems, which, on the one hand, reflects the globalization of markets for finished goods, production, material resources, supplies, labor, capital, and on the other - creation and development of global interstate transport and logistics, telecommunication, distribution and other macrologistic systems.

Keywords: *logistics; the concept of logistics; principles of logistics; logistics services; the macrologistic system; national and global market for logistics services; logistics costs; factors of logistics service.*

Introduction. Under the influence of deepening international division of labor, accelerating scientific and technological progress of modern world economy is undergoing profound changes in globalization, information and regionalization of the world economy. Worsening international competition, the transformation of foreign economic relations determine the need for developing new approaches to sustainable development of national economies. One of these new approaches in the development strategy of leading countries (USA, Germany, Japan, etc.) is the implementation of logistics in the processes of social reproduction. The successful operation on the international market today is impossible without active use and sustainable development of international marketing methods and tools of global logistics.

Thus, it is necessary to study current trends in the logistics services market according to new global conditions and mechanisms for improvement of the Ukrainian companies activity towards the identified trends.

Literature review. The features of the impact of globalization processes on the logistics services market have been investigated by such scholars as A. Hadjinsky [1], D.Y. Bowersox [4], D. Kisperska-Moroń and St. Krzyzoniak [5] and other.

Purpose. The main aim of this research is to work out new approaches to granting the complex of logistics services as the major aspect in development of international logistic. The objectives of the empirical research are to study the concept of logistics as a new paradigm of global market and to reveal trends in the global market of logistics services.

Results and discussion. The emergence of logistics as a scientific field of economic activity was caused by factors that determined the formation of management and marketing in industrialized countries: growth of goods production, market development, increased competition and the implementation of a systematic approach to business. In countries focused on the development of market relations, there was the phenomenon of mediation regulation of economy.

The initial concept of logistics was formed in the late 70th of XX century as the process of infiltration systems approaches in the open market. Logistics developed under the influence of factors such as the transformation of seller's market in the buyer's market, complexity of the production structure, competition exhaustion of productive resources, increasing environmental requirements.

In the 80th there was a revolution in information technology, which is directly reflected in logistics. There automated material management (Supply Chain Management System) and rolling stock multimodal transport using satellite systems, improving the collection and transmission of information. Thus in historical retrospective were identified the following stages of the logistics genesis that are presented in Fig. 1.

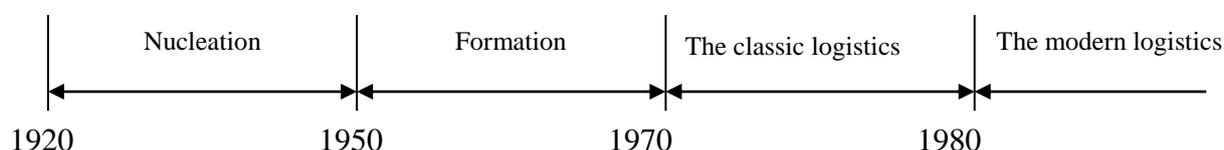


Fig. 1. The genesis of the logistics development [1]

In the modern understanding the logistics means the theory and practice of material, information and financial flows management. Establishing modern logistics concept closely associated with the development and evolution of the market economy. In terms of saturated markets and the moderate rate of economic development appeal to the logistics was a natural process of the management theory and practice development. The main factor in obtaining competitive advantage was the optimization of costs related to the supply, sale, delivery of products, after-sale service.

The Council of Logistics Management (USA) have made the following changes in the logistics definition: «Logistics is the planning and implementation process (including control) of effective and continuous supply of goods, services and related information from wherever they are created, to consumers, that aimed at all-round satisfaction of consumer needs» [2, p. 5].

This definition does not cover absolutely all the specific concepts that are included in the functional area, it reflects the need for a unified management of material flows from the primary source of raw materials to the point of distribution of the finished product. The most striking manifestation is that logistics provides comprehensive results through internal and external integration of enterprise competencies.

According to specialists the current stage of development of the industry (2000s) is determined by two main factors: the globalization of the world economy and the global scientific and technological revolution, that generate the new customer needs for logistics services [3]. Globalisation has impact actually on the all aspects of social and economic life, which leads to the formation of a large number of multinational companies that use the global logistics chains. They contribute to the development of international freight forwarders, financial intermediaries (banks, insurance companies, etc.), the global telecommunications network and other market actors.

Global logistics is subject to the same laws as the national, but the world market confronts specific logistics challenges. First, the functional cycle of global logistics longer because of the greater distances to be crossed, a large number of intermediaries and the need to use many slow ocean cargo transportation. Second, most logistics operations in the world market more complex

because of the greater variety of units and conservation of inventories in general, which have to deal with more documentation required more storage capacity and less-developed logistics system (including transport and storage). Third, at the global level increased requirements for information systems as a growing need in the length of communication channels using different languages and maintaining flexibility of logistics processes. And fourthly, the world market can not do without global production, logistics and marketing alliances, creation and development of which is also a challenge.

The many aspects of logistics leads to the development and enrichment of the concept of transformation components which are thinking:

- aimed at cost and logistics benefits because of the formation of its new capabilities, additional utilities and value (cost of places, the value of the time, value of product information);
- system categories, based on the interdependence of tools and processes;
- categories of general and complete costs consist of logistics costs (transportation, warehousing, packaging, inventory management, etc.), the purchase cost and the cost of customer service;
- categories of service of (order cycle, reliability, quality and flexibility of the order);
- categories of performance.

This structured approach to logistics concept has a number of consequences and defines its principles (Table 1).

Table 1

The logistics principles

Principle	Essence of the principle
1. Functional	Establishment of logistics as a penetrating tool covering in the form of material flow all components of the process, in the broadest sense, from the creation of ideas and ending with the release of the goods from the market, in a narrower - from primary sources, ie producer of raw materials to the final consumer;
2. Institutional	Changing organizational structures of management with localization of logistics management
3. Instrumental	Formation theory of logistics as a tool for planning, directing and controlling the movement of goods, information, finance, engineering and technology using logistics processes, which requires a systematic approach.

Source: compiled by the author [4].

Thus, modern logistics concept based on interconnected, close relations in the field of functional, institutional and instrumental aspects of the physical circulation of goods.

Logistics concept involves the following areas:

- formation of economic relations;
- determine the need for volumes and directions of traffic products;
- determine the sequence of passing the goods through storage items;
- operative regulation of supply and transportation;
- formation and management of residues;
- the development of storage facilities;
- providing commercial and freight forwarding services [5].

In economically developed countries, logistics for decades considered an important component of the national economy, which is quite justified. The world market of logistics services is estimated at more than 5 trillion. dollars, it is annually growing by 4-5%.

As is known from general theory the component of logistics in the structure of Gross domestic product of the country – an important characteristic of the economy, a kind of macroeconomic indicator. In this aspect it should be noted the global trend – the higher the level of development of the country, the lower the share of logistics costs in the GDP of the economy, as seen in Fig. 2.

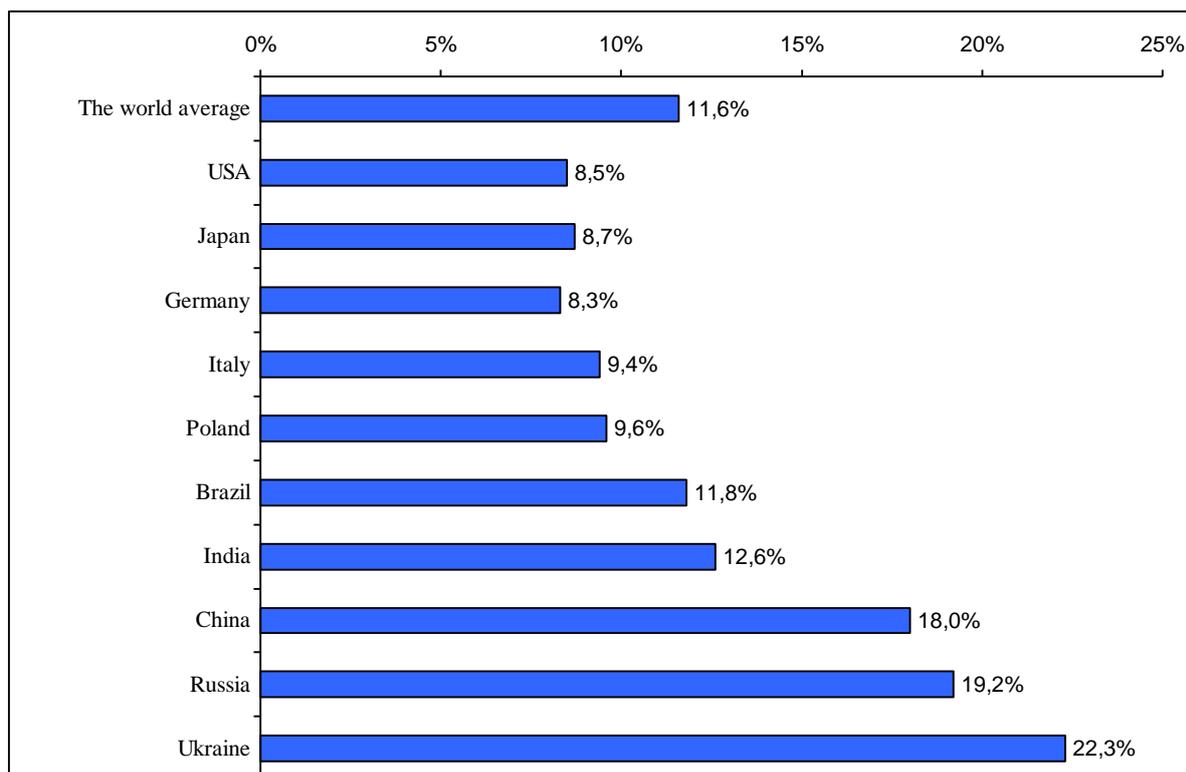


Fig. 2. Logistic costs in GDP in 2018, %

Source: calculated by the author for [6].

As can be seen from the given diagram, if developed countries logistic component of GDP varies between 10 - 15%, in well-organized economies this percentage is even smaller.

According to the adopted classification in Europe, the main market segments of transportation and logistics services are:

1. Cargo and freight forwarding services
2. Integrated logistics services, including services for the storage and distribution of goods
3. The management logistics, including logistics services to optimize business processes.

The structure of global transport and logistics services market is shown in Figure 3.

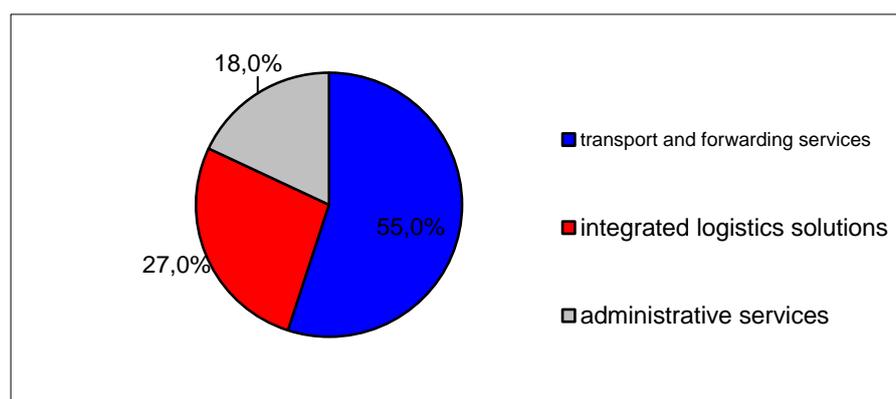


Fig. 3. The structure of global transport and logistics services market

Source: calculated by the author for [7].

As can be seen, in the global TLS market structure about 55% comes from transport and forwarding services. At the same time, their share under the influence of a slowdown in the growth of international transportation is reduced. Integrated logistics solutions provide 27% of the market turnover, a growing share of administrative services - 18%, in 2018.

In the ranking by the World Bank Logistics Performance Index (LPI) used for the determination of the logistics performance of the country estimated 7 parameters: 1) activities of

customs service; 2) infrastructure; 3) international traffic; 4) logistics competence; 5) tracking; 6) internal logistics costs; 7) timely delivery.

In 2018 to leading countries included in the top ten entered Singapore, the Netherlands, Germany, Sweden, Austria, Japan, Switzerland, Hong Kong (China), the United Kingdom and Canada (Table 2).

Table 2**The rating of the World Bank in terms of logistics performance**

The country	Ranking
Singapore	1
Netherlands	2
Germany	3
Sweden	4
Austria	5
Japan	6
Switzerland	7
Hong Kong (China)	8
Great Britain	9
Canada	10

Source: compiled by the author [7].

The main factors determining the demand for integrated transport and logistics services (TLS) is the dynamics of the world economy and the international exchange of goods, globalization of traffic and complexity of schemes of delivery, the need for optimization of the costs associated with transportation, storage and distribution of goods.

In 2015 - 2018 the trajectory of the global market of transport and logistics services was determined by a slowdown in global growth and trade. The decline in external demand caused by the recession in the euro zone, seriously hampered the growth of exports of energy and raw materials as well as finished industrial products from developing countries, including Russia. In the medium-term economic situation will remain unstable.

Among the long-term trends of the world economy and trade, directly affecting the dynamics of the global traffic and TLS market indicators, the following should be noted:

- the reorientation of capital from developing country markets to the US market (in the industry and the production of new technological cycle);
- changes in the structure of investments in the Chinese economy from material- and labor-intensive industries - to the capital-intensive and high-tech.
- the decline in demand for industrial raw materials, the downward price trend.

The most striking in terms of the global experience is especially the formation of transport and logistics networks in Europe and China. In Western Europe, focused development of transport logistics centers began in the early 80's that was caused by high dynamics of growth in freight and passenger traffic in a globalizing world commodity markets.

According to the Secretariat of the European Conference of Ministers of Transport, the 42 member states of the organization in the period from 1970 to 2001 freight turnover increased from 513,9 billion t-km to 1848,3 billion ton-kilometers, which is more than 3 times, and passenger turnover - from 2631,1 billion pass. km to 5507,3 billion pass. km, or more than twice [8].

Increasing competition between commodity producers forced them to seek additional opportunities to reduce transport component in the final price of goods. This required the creation of new technology, development of transport infrastructure, introduction of modern transport and logistics technologies that enabled a result of lower transportation component in the final price of goods up to 10-12%, and the total cost producers in transport and logistics services by 10-30%.

It is with the development of the trans-European network of logistics centers and formed of developed projects related to Euro logistics system, logistics is on a European scale. The experience of Western Europe shows the significant role of transit logistics centers in shaping the budget. Thus the Dutch activities of logistics centers transit brings 40% of the transport sector, in France – 31%,

Germany – 25%. In Central and Eastern Europe this share averages 30%. And just the overall turnover of the European market of logistics services reach over 600 billion Euro. Of these, about 30% of logistics functions in all sectors of the economy annually sold logistics companies [8].

The relatively new trend in the development of logistics companies in Western countries is the formation of European system of goods movement that involves multiple European centers supporting logistics and regional logistics freight distribution centers that interact with them. This solution is intended to accelerate the promotion of commodity material flow, ensure continuity of the movement of goods. The basis of this strategy was laid the trans-European transport network (TEN) and approved in July 1996. The Concept of "Common main lines creating Trans-European Networks" the principle of integration of different transport modes in multimodal transport network. An important provision of basic directions TEN is network expanding to the east and its connection to the transport networks of third countries.

In 2001 established the European platform for transport research (EPTR) in order to improve cooperation and coordination in the area of of public transport research programs. The European platform for transport research highlights the growing role of the organizers of the traffic, aimed at combining specific strengths that are inherent each mode of transport, in order to offer the customer the best service [9].

For instance, in Germany the center of transport logistics formed mainly on the basis of existing railway lines and junctions. Most are intended for parallel use of road and rail transport, there are also three modular logistics centers.

German model building logistics centers characterized by several features:

- strong government support at all levels;
- part of the public sector based on federal laws;
- the federal budget is involved in financing investment by Deutsche Bahn AG (German railways);
- widely practiced allocation of budgets federal subsidies, targeted subsidies and loans for specific investment;
- financial support for investments carried out as federal lands, and local government.

This model clearly defined and sources of investment funds: investors who want to share infrastructure logistics operators; transport company; entities that form associations with private capital; budget and trust funds of federal lands; programs and federal funds aimed at the development of infrastructure; grants of cities and regions; EU grants and programs. Investment capital is complemented by a bank loan.

Created logistic centers managed by the supervisory authorities are created by different companies - participants of the project. The public sector is involved both in the planning phase and in the implementation phase of investment in the development of logistics centers.

Complex functions that performed transportation and logistics centers allows to consider them not only as a national transport and logistics units, but also as a kind of frame that combines the transport, rolling stock and infrastructure into a single transport system is not only EU country and the region, but in the global market in the future.

In China providing logistics and financial services in the Free Trade Zones regulated by fundamental provisions governing the list of activities, ownership, compliance with certain conditions, experience of the business of international trade, international transportation, validity period and so on.

For example, the following provisions stipulates that logistics enterprise with foreign investments may perform services for transportation, storage, handling, packaging, consolidation, integration, information support and services for the design of trade agreements regarding the export of these goods [10]. However at least one of the participants of the joint venture should have a positive experience in international trade, international transportation, practice as agent of such traffic. Activities on the creation common transport and logistics centers with foreign investment and the introduction of logistics services (transportation, creation of data-processing network traffic control systems) is tightly controlled by the state permits. However expansion of activities of businesses (diversification of logistics services) is only according to the legally mandated programs.

Summarizing foreign experience, especially the EU, of planning logistics centers, we can formulate the main recommendations to the creation of logistics facilities:

- focusing on the interaction between traffic nodes for better planning and integration between existing nodes;
- the projects planning at the national, regional and local levels should be conducted jointly;
- management of logistics facilities and their development should be carried out under a public-private partnership;
- strategy of development of transport and logistics centers in the country and create transport infrastructure program should be discussed by the state, the business community and civil society organizations;
- plans for freight logistics centers at regional and local levels should be synchronized with the plans of regional development.

Thus, ongoing the process of merger of major Western companies with logistics providers, have a network of warehouses in the regions and provide services for cargo delivery to customers.

Now the logistics company will return the project activities. Not enough to simply provide a service. Required integrated approaches to the challenges and problems of customers. Must be able to identify their needs, formulate their business objectives clearly set priorities, intelligently and gradually move the project.

Conclusions. Summing up the analysis of the main trends of globalization of logistics markets, can conclude that in today's world, globalization is the main trend in the development macrologistical systems that on the one hand reflects the globalization of markets for finished products, production, material resources, supplies, labor, capital, and on the other – the creation and development of the global inter-state transport and logistics, telecommunications, distribution and macrologistical other systems.

Economic and logistic integration is a higher stage of development of the world economy. Introducing higher form of internationalization, integration causes irreversible changes in the economy of the countries participating in integration associations and economically it has a more profound, the complex nature of the economic relationships of national economies, which leads to a structural change both within households and in their economic relations with each other.

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ТЕНДЕНЦІЇ РОЗВИТКУ ГЛОБАЛЬНОГО РИНКУ ЛОГІСТИЧНИХ ПОСЛУГ

Проблема. Процес посилення конкуренції на міжнародному ринку логістичних послуг вимагає сучасних підходів до розвитку нових технологій, підвищення якості послуг. Під впливом поглиблення міжнародного поділу праці, прискорення науково-технічного прогресу світова економіка зазнає глибоких змін у напрямках глобалізації, інформатизації та регіоналізації. Посилення міжнародної конкуренції, трансформація зовнішньоекономічних зв'язків визначають необхідність розробки адекватних підходів до сталого розвитку національних економік. Одним із таких підходів у стратегії розвитку провідних країн (США, Німеччини, Японії тощо) є впровадження логістики в процеси соціально-економічного відтворення. Успішна діяльність на міжнародних ринках сьогодні неможлива без активного використання та розвитку міжнародних маркетингових методів та інструментів глобальної логістики.

Метою наукової статті є дослідження тенденцій розвитку ринку логістичних послуг в умовах глобального середовища. Для досягнення зазначеної мети вирішені завдання: вивчити концепцію логістики як нової парадигми світового ринку; виявити тенденції на світовому ринку логістичних послуг.

Результати. У статті досліджені тенденції розвитку глобального ринку логістичних послуг, зокрема наведена характеристика генезису концепту «логістика» у своєму еволюційному розвитку, визначено поняття логістики у сучасному його розумінні. Встановлені головні фактори впливу на ринок логістичних послуг, а саме – глобалізація світової економіки та науково-технічний прогрес, що висуває нові вимоги до якості логістичних послуг з боку їх споживачів. Доведено, що глобальна логістика функціонує за тими самими законами, що й логістика національного рівня, але має власну специфіку, що обумовлено вимогами світового ринку, зокрема: характеризується більш тривалим операційним циклом; містить більш комплексні логістичні операції; висуває підвищені вимоги до інформаційних систем; обумовлює поєднання логістичних процесів з маркетинговими технологіями. Встановлено, що сучасна логістична концепція базується на взаємопов'язаних, тісних відносинах у сфері функціональних, інституціональних та інструментальних аспектів фізичного обігу товарів. За підсумками проведеного аналізу основних тенденцій глобалізації логістичних ринків, зроблено висновки, що у сучасному світі глобалізація є основною тенденцією розвитку макрологістичних систем, яка, з одного боку, відображає глобалізацію ринків готової продукції, виробництва, матеріальних ресурсів, поставок, робочої сили, капіталу, а з іншого – створення та розвиток глобальних міждержавних транспортних та логістичних, телекомунікаційних, дистрибуційних та інших макрологістичних систем.

Наукова новизна. Виявлені тенденції розвитку глобального ринку логістичних послуг, які необхідно враховувати в управлінні транспортно-логістичними підприємствами для вдосконалення процесу впровадження логістичних послуг з міжнародними транспортними послугами, а саме реалізації стратегії диверсифікації спектру логістичних послуг, а також інтеграції в національну та міжнародну систему логістичної інфраструктури.

Висновки. Підсумовуючи аналіз основних тенденцій глобалізації логістичних ринків, зроблено висновок, що в сучасному світі глобалізація є основною тенденцією розвитку макрологістичних систем, що, з одного боку, відображає глобалізацію ринків готової продукції, виробництва, матеріальних ресурсів, постачання, робочої сили, капіталів, а з іншого – створення та розвиток глобальних міждержавних транспортно-логістичних, телекомунікаційних, дистрибуційних та інших макрологістичних систем. Економічна та логістична інтеграція є вищим етапом розвитку світової економіки. Запроваджуючи вищу форму інтернаціоналізації, інтеграція спричиняє незворотні зміни в економіці країн, що беруть участь в інтеграційних об'єднаннях, при цьому економічно вона має більш глибокий, складний характер міждержавних відносин національних економік, що призводить до структурних змін.

Ключові слова: логістика; концепція логістики; принципи логістики; логістичні послуги; макрологічна система; національний та світовий ринок логістичних послуг; логістичні витрати; фактори логістичного обслуговування.

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