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## MARKETING OF LOGISTICS SERVICES IN POLAND AND IN UKRAINE

*Outline of the contents:* This article contains a description of marketing actions that are undertaken by TSL companies. The purpose of the article was an analysis of marketing instruments on the market of logistics services in Poland and in Ukraine. A literature analysis and a comparative analysis were performed in relation to the services offered. The logistics services market in Poland was presented and compared to the Ukrainian market. A presentation was provided of those marketing elements that are realized in Poland and in Ukraine by selected logistics operators and of the instruments that are formed by them in both countries. Attention was paid in the article to the development trends of logistics services and the dynamics of changes in selected logistics companies.

*Key words:* logistics operator, services marketing, instruments of marketing.

### Introduction

The TSL (i.e. transport, shipment, logistics) market plays a vital role as these services guarantee the development of the economy of the whole state in the individual sectors and companies. Those marketing activities that are used by TSL companies including logistics operators provide highest level logistics services to institutional and individual customers. The purpose of this article is an analysis of the development of marketing actions and instruments on the market of logistics services in Poland and in Ukraine as well as the implementation of marketing mix elements. A method of a comparative analysis of the services offered by logistics operators and a literature analysis were used herein.

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In Poland, changes related to the transport market and a conversion of companies from this sector into shipping companies and later into those companies that provide logistics services occurred in the 1990s. In Ukraine, these changes commenced after the year 2000. The chief change consists in an acceleration and popularisation of technological advancement, which shortens the life cycles of services and forces companies to introduce changes to the portfolio of products in the area of logistics services. Companies in Ukraine are in the process of these changes. An internationalisation of the world's economy, a creation of a uniform European market only accelerated these transformations in Poland, while it caused a delay in Ukraine in relation to other European states. New social needs emerge that are reflected in consumerism (e-commerce) and ecology (social responsibility in TSL companies).

## **Concept of marketing in TSL companies**

TSL companies need to redefine their market orientation, which has an influence on the use of the classical concepts of marketing. In the market orientation, it is the consumer who is the object of activities, and marketing constitutes an element that supports the functioning of market processes. In this orientation, the following constitutes an important stage that precedes the use of marketing tools<sup>1</sup>:

- collection and processing of market information,
- preparation of marketing instruments and activities.

A close cooperation of transport and shipping companies with logistics operators and an exhaustive market analysis is reflected in the evolution of thinking, where it is the fulfilment of the individual and institutional customer's needs in a chain of deliveries that is in the focus. Strategic marketing management is the target phase of marketing that determines the achievement of the intended goals in the long run as a result of the growing competitive requirements of the environment. The decisions taken by TSL companies are influenced to a great extent by environmental protection requirements. The concept of social marketing is a more perfect development of the marketing concept, where it is important to preserve a balance between the interests of the enterprise, the consumer and the natural environment. In transport, there have occurred concepts to charge those responsible for external costs with fees, such as environmental fee in connection with emissions of gases or dusts to air from

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<sup>1</sup> G. Rosa, *Marketing usług transportowych – kierunki rozwoju*, „Zeszyty Naukowe Uniwersytetu Szczecińskiego”, No. 710, „Problemy Zarządzania, Finansów i Marketingu”, No. 24, 2012, p. 200.

the combustion of fuels by the means of transport<sup>2</sup>. According to this rule, companies realize the so-called enlightened marketing, which is composed of customer oriented marketing: partner marketing and customer service, innovative marketing, marketing of values, marketing based on a mission: knowledge possessed by employees, and social marketing<sup>3</sup>. TSL companies are constantly charged fees, such as fees for the use of roads and motorways, or the proposed road toll is intended to realize the sustainable development concept. Many authors emphasize<sup>4</sup> the care of the natural environment, further development of partnership with the customer, a financial analysis of the chain of deliveries. An integrated system is to allow the management of the flow not only of products but also of human resources in the chain of deliveries. In order to increase the capacity and the cargo stream, a dynamic change is introduced of the routes of transport flows, the transparency of management, international electronic communications platforms<sup>5</sup>, safety and the policy of cohesion with legal regulations, an analysis of total transport costs and risk management. As a consequence of changing conditions (Poland's accession to the European Union, globalisation), there occurs an atomisation of marketing and an abrupt growth of the demand for new marketing instruments in the changing environment. TSL companies aim at the satisfaction of the logistics needs of purchasers and they intend to take into account in their activities those transformations that occur on the market as a result of intensifying competition.

Marketing management involves an implementation of a marketing concept in the practice of companies, the result being the efficiency and effectiveness of the operations of the organizations; it consists in the use of the management function to create and implement marketing mix<sup>6</sup>:

- the knowledge of the needs of the market and a preparation of an offer of products to satisfy customer preferences,

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<sup>2</sup> Act of 27.04.2001 Environmental Protection Law, Journal of Laws 2001, No. 62 Item 627.

<sup>3</sup> Ph. Kotler, G. Armstrong, J. Saunders, V. Wong, *Marketing. Podręcznik europejski*, PWE, Warszawa 2002, p. 94.

<sup>4</sup> N. Chamier-Gliszczyński, T. Bohdal, *Mobilność na obszarze miejskim w ochronie środowiska*, „Annual Set The Environment Protection”, Vol. 18, issue 1, 2016, p. 396; E. Kieźel, *Konsument i jego zachowania na rynku europejskim*, PWE, Warszawa 2010, pp. 180-181.

<sup>5</sup> B. Mróz, *Konsument i konsumpcja we współczesnej gospodarce*, Wyd. SGH, Warszawa 2006, pp. 220-221.

<sup>6</sup> B. Żurawik, W. Żurawik, *Zarządzanie marketingiem w przedsiębiorstwie*, PWE, Warszawa 1996, pp. 22-23; E. Michalski, *Zarządzanie przedsiębiorstwem, Podręcznik akademicki*, PWN, Warszawa 2013, p. 64.

- determination of the target group of purchasers (segments),
- designing and production of the desired range of goods and services,
- achievement of financial successes.

An implementation of marketing management is accompanied by changes and modifications to the organizational structures that are adapted to the individual nature of the companies. Marketing management comprises the following: market analysis through market research, planning, implementation and control. The marketing composition makes it possible to inform purchasers of the fact that the producer is able to satisfy the purchasers' needs and to facilitate the purchase of products. Marketing instruments are related to all tangible and intangible means with the aid of which influence is intentionally exerted on the attitudes and behaviours of individuals and organizations as consumers and purchasers<sup>7</sup>. In practice, companies make use of any marketing instruments that are included in the marketing composition: the product, promotion, distribution, price, later extended to include people (personnel) and, additionally added to services, the process and the quality of the service<sup>8</sup>. For Logistics sector, in which Rohling Suus and Zammler performs, it is crucial to provide different alternatives according to the variety of products which are to be transported. For standardized freight services, logistics firms prefers implementing cost plus pricing strategy which covers deciding on final price by adding a percentage to costs as a profit margin. Logistics operator usually prefers introducing its service offerings through advertisements. Additionally, for example DHL holds several sponsorship deals with some of the most exclusive worldwide events such as Rugby World Cup, Formula 1, IMG Fashion Week, Manchester United, Barclays Premiere League and Gewandhaus Orchestra. These sponsorships are carefully selected by DHL with the intention of reflecting the values of the company. Advertising through mass media and traditional manners is complemented by public relations, with the purpose of generating a positive image of a company in the market and society preferably through editorial text. Regarding the selection criteria of distribution channel members, logistics operator selects channel members based on several criteria such as service quality, costs and equipments/facilities. Some customer freights may require special equipment and carriage. For instance, when perishable goods such as chemicals or food are transported, shipping firms which offer cold options are selected, or to ship hazardous materials, those airlines that have authorization of hazardous material transportation are chosen. It can be said that

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<sup>7</sup> R. Niestrój, *Zarządzanie marketingiem. Aspekty strategiczne*, PWN, Warszawa 1996, p. 179.

<sup>8</sup> J. Dyczkowska, *Marketing usług logistycznych*, Wyd. Difin, Warszawa 2014, p. 75.

the most significant expectation of operator from its channel members is meeting promised requirements. Components of physical layout such as odors, colors, temperature, noise level, and comfort of furnishings may influence the perceived performance of service provider. Organizations operating in services industry should emphasize on physical evidence when establishing service standards, because the tangible evidence and the attitude of the customer specifies the ultimate quality of the service experience. At logistics operator, personnel training is a very crucial aspect. Before starting to work for them, every employee have to attend to program that aims introducing all products to employees and developing their communication skills. All employees receive trainings, which are related with their departments, i.e. MS Office, communication techniques, multidimensional leadership etc. Moreover, since the company uses a SAP based IT program, all of the employees get training regarding the usage of Intranet system.

It should also be noted that additional department-based trainings are being arranged in accordance with needs of departments such as sales, product, customer relations and operation. Logistics operator pays attention to the integration of computer programs for measuring customer satisfaction and being able to inform customers about processes. Problems regarding cargo handling are being measured via questionnaires in certain time periods. Complaints and customer opinions are being recorded routinely. Received complaints are being categorized according to related subtitles and the company endeavors to develop solutions to satisfy customers' demands as fast as possible in order to prevent customer losses. In a similar vein, I-sell program is being used for keeping records of customer visits and sales reports<sup>9</sup>.

7P still remains the basis including more aware management in relation to those changes that occur in the environment. The reason for the development of the primary marketing concept is among others the intangible nature of services and the resulting basic consequences such as the non-standard nature of logistics services that are connected with the process of the provision of services, which is influenced by the technology of the provision of services (creation of transports between sorting departments and terminals), work efficiency (lack of empty legs) and an organization of the service provision process (full truck load transports, part truck load transports, general cargo and parcel cargo).

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<sup>9</sup> B. Oflac, B. Dobrucali, T. Yavas, M. G. Escobar, *Services Marketing Mix Efforts of a Global Services Brand: The Case of DHL Logistics*, "Procedia Economics and Finance", No. 23, 2015, pp. 1081-1083.

## Logistics services in Ukraine

The initial stage of the formation of professional logistics services market in Ukraine can be considered in 2000, when national logistics companies that matched for international standards of development in their area began to appear. Today, the logistics market of Ukraine is in the process of stabilization. It is becoming more open, civilized and professional.

According to the rating Logistics Performance Index<sup>10</sup> in 2016, the efficiency level of the logistic system of Ukraine occupies 80<sup>th</sup> position from among 160 countries. The number of main acting logistics companies and logistics operators in Ukraine is very small, while in developed Western countries, their number is measured in hundreds. The list of major companies that provide logistics services in Ukraine is presented in Table. 1.

Most Ukrainian companies in the organization of logistics schemes use 1PL and 2PL. About 90% of companies provide logistics services in Ukraine – 2PL-providers. More advanced ways of organizing of logistics (3PL, 4PL) applies only 1-2% of Ukrainian enterprises. 1PL stands for first party logistics firm or individual that need to transport cargo , goods and others merchandise from one points to another. Means both sender and receiver. 1PL can be any manufacturer, any retailer or distributors etc. It can also be a institution such as any government organization also. So anyone can be belongs to this who having some goods, which they want to move. 2PL stands for second party logistic. It is an asset-based carrier in which one have means of transportation. Such as airlines which own, lease or charter their planes and truck companies which own or may be others transportation services. So it mainly belongs to transportation systems. 3PL stands for third party logistic, which provide 'third party' logistics services to companies for part or sometimes all of their supply chain management function. It means company belongs to this will outsourced, and they work as mediator between main party and receiver. E.g. DHL. 4PL stands for forth party logistics systems, which is an independent body, own accountability, not depends upon other resources , capabilities and technology of its own organization. Unlike others company belongs to this categories have their own resources.

The main participants of the Ukrainian market that offer logistics services under the scheme 3PL are international, in particular, «Raben Ukraine», «Shenker Ukraine», «Kuehne and Nagel», «FM Logistic», «DHL» ) and others which are characterized by significant financial opportunities and established relationships with multinational customers.

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<sup>10</sup> International LPI global ranking, <http://lpi.worldbank.org/international/global>, (3.04.2017).

**Table 1.** List of major logistics companies in Ukraine, 2017

Ukrainian	Foreign, that have representation in Ukraine
<ul style="list-style-type: none"> <li>- logistics operator «Ukrainian cargo couriers»;</li> <li>- logistics operator «ZAMMLER»;</li> <li>- logistic company «SAVSERVICE»;</li> <li>- logistic company «Ukrtrans»;</li> <li>- logistic company «Ost-West Express»;</li> <li>- logistic company «Center of transport logistics»;</li> <li>- logistic company «Delivery»;</li> <li>- logistic company «LOGISTIC-PLUS»;</li> <li>- logistic company «GTL» and other.</li> </ul>	<ul style="list-style-type: none"> <li>- logistic company «Kuehne and Nagel» (Germany);</li> <li>- logistic company «Raben» (Netherlands);</li> <li>- logistic company «DHL» (Germany);</li> <li>- logistic company «FM Logistics» (France);</li> <li>- logistic company «Shenker Ukraine» (Germany) and other.</li> </ul>

**Source:** Author's own study.

Among national logistics 3PL-operators, the company of “Ukrainian Cargo Couriers (UVK)”, deserves attention<sup>11</sup> which has been providing comprehensive logistics services in Ukraine since 2001 and offers the following services.

1. Nationwide distribution:

- regular scheduled distribution of cargo to over 3,000 stores of Ukraine's key retail;
- door-to-door delivery of cargo from 1 box;
- cargo delivery to any place in Ukraine within 48 hours;
- assurance of cargo safety in delivery due to the tailor-made transportation resource planning module (TMS);
- unique documents circulation system (DCS) to the benefit of both the consignor and the consignee;
- early cargo delivery time notice to consignee;
- liability for cargo safety (if insured through “UVK”);
- non-disclosure of client's commercial secret.

2. Storage and warehousing services. Warehouse services, safekeeping of goods, their processing and storage warehouse to rent for company logistics terminals throughout Ukraine:

- overall space of the company's facilities exceeding 60,000 sq. m;
- 8 logistics centers A- and B-class and 27 cross-docking warehouses across Ukraine;

<sup>11</sup> <http://uvk.ua/rus/index.php> – website of company «UVK», (10.02.2017).

- a unique technology of storing and processing all sizes of products (pieces, box, pallet);
  - application of state-of-the-art and tailor-made E-Stock WMS-system;
  - perform all operations using modern equipment and TSD;
  - service «Shared Stock» (simultaneous storage and handling of goods) in Kiev, Dnipropetrovsk, Lviv, Odessa and Kharkiv.
3. International forwarding:
- export-import door-to-door deliveries;
  - storage, handling and accumulation of consignments in ports;
  - complete freight management and customs clearance of all types of cargo;
  - FTL, LTL, FCL, LCL transportations;
  - managements of air freight from 1 pallet up to 120 tons;
  - transportation of serial-condition cargos;
  - direct deliveries to the West and East-European and CIS countries;
  - transportation and customs clearance of personal belongings.
4. Customs services brokerage on Ukraine's customs law and procedures, and bonded storage and warehousing services within one of its logistics terminals. The range of these services includes:
- storage and warehousing at the bonded facility of 1,000 sq. m;
  - client's company accreditation at the Kiev Regional Customs Office (KRCO);
  - consulting foreign operations of foreign economic activity business.
5. Fulfilment and additional services:
- assembly of promo-units, stickering, labeling (at commercial and bonded facilities);
  - re-packing of goods;
  - assembly of promo-units of any complexity;
  - branded packaging of promo-units;
  - stickering of single product unit;
  - insertion of various leaflets;
  - labeling of promo- and product units;
  - documents Carriage System (consignor – consignee – consignor);
  - integration of a Client's and the UVK's accountancy systems.

Regular “UVK” customers are more than 350 companies.

In an effort to optimize the relevant business expenses, to improve customer loyalty, to gain strategic advantages over their competitors, managers are increasingly resorting to improve logistics efficiency throughout the supply chain.



## Logistics services in Poland

In 2015, revenues from the sale of services in all transport entities were higher by 4.9% in comparison with 2014 and amounted to PLN 187.6 billion (increased by 1.8% in the public sector and by 5.5% in the private sector). The share of enterprises employing more than 49 persons accounted for 46.4% of total revenues and the increase in the sale of services in these entities amounted to 5.1%. The gross financial result generated by entities employing more than 49 persons amounted to PLN 4303.2 million in 2015, compared to PLN 2766.1 million a year earlier, and the net financial result grew from PLN 2027.1 million in 2014 to PLN 3382.9 million in 2015. The cost level indicator for total activity amounted to 95.6% (compared to 97.0% last year), and the cost level indicator for the sale of services decreased from 98.5% in 2014 to 97.3% in 2015. The indicator of profitability rate of gross turnover increased from 4.4% compared to 3.0% last year, while the indicator of profitability rate of net turnover increased from 2.2% to 3.5%.<sup>12</sup>

It is above all warehouse logistics and information technology, which in logistics is oriented onto e-commerce and that uses modern warehouse systems and advanced technologies, which is a direction where the transport market is developing the most resiliently. For this purpose, the functioning is being improved of various types of warehouses including an introduction of common barcodes in the entire chain of deliveries. The so-called intermodal transport has been gaining on popularity for a longer period of time now. This is the best solution, especially in international shipments. It is referred to as a positive example of an implementation of work connected with environmental protection. The resilient development of this industry is related to the relatively low costs of salaries for employees, while this may end by an introduction of regulations that cover foreign drivers with minimum wages in the EU Member States. Obviously enough, safety constitutes an important issue in this industry; more and more efforts are made in this area by taking care of employee qualifications and the comfort of their work. This sector is in the lead as regards the number of those being employed. This index is constantly growing: TSL needs specialists from many areas. Most of major companies have recruitment on constant basis. A problematic area is a stagnation in the development of logistics centres that is caused by the development of discount store chains, which has been observed for the past several years. Even this year, a great challenge for the companies is posed by actions aimed at interoperability, i.e. specific matching and synchronization of systems that are used in the

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<sup>12</sup> *Transport. Activity Results In 2015*, Central Statistical Office, Warsaw 2016, p. 62.

individual states. It is above the rail that requires such steps to be taken; its significance in transport is constantly decreasing due to the high infrastructure financing costs, which translates onto the price of the service. The geopolitical situation in eastern Europe is also worrying, which cannot be ignored in spite of optimistic forecasts for the coming months.<sup>13</sup>

There is already a total of 10.3 million square meters of modern warehouse space. This is the largest figure in Central-East Europe. The development of e-commerce is one of the reasons for this high dynamics of the warehouse market. The supplier wants to be close to the customer to be able to deliver goods as quickly as possible. The supply of modern warehouse space in Poland is expected to double in the coming decade in Poland. As stated by CBRE, the region of Warsaw is the best developed location in Poland. It concentrates nearly one third of the total supply of space (with 3.1 million square meters). Other good locations for contract logistics include Upper Silesia (1.8 million square meters), Poznań (1.5 million square meters), Wrocław (1.4 million square meters) and Central Poland excluding Warsaw (1.3 million square meters). Growing towns pose a challenge to logistics companies. On the one hand, they need to deal with difficulties accessing centres; on the other hand, e-commerce forces the need to quickly deliver goods, which drives the demand for warehouses. New lease contracts concluded by logistics companies that offer their services to e-commerce may involve as many as 700 thousand square meters by the year 2020. The availability of personnel, and attractive labour costs in particular as well as low real property rental costs in Poland offer an opportunity to Poland to attract new players from e-commerce industry. For Internet commerce, it is not only the Polish but also the Western consumer and a good condition of the production sector that is the target group. Poland is being targeted by large e-commerce players: the American giant: Amazon, as well as e.g. Home24, a seller of furniture and interior furnishings. There are also numerous Polish e-commerce companies. For example, the company of Oponeo, an Internet tyre seller, has rented 12 thousand square meters. Experts observe that the warehouse market in Poland is strongly fueled by Internet sale companies, which transfer their activities from Germany and Scandinavian countries.<sup>14</sup>

The analysis of the tendencies that occur in the TSL sector based on companies included in the 21<sup>st</sup> edition of the TSL companies ranking conducted

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<sup>13</sup> S. Błażejczyk, *Pierwszy kwartał 2015 roku w branży TSL*, „Gazeta Finansowa”, 8-14.05.2015, p. 20.

<sup>14</sup> K. Majszak, *Rynek powierzchni magazynowych eksplodował*, [http://g5.gazetaprawna.pl/p/\\_wspolne/pliki/2591000/2591057-dgp-2016-06-27-21-edycja-rankingu-firm-tsl.pdf](http://g5.gazetaprawna.pl/p/_wspolne/pliki/2591000/2591057-dgp-2016-06-27-21-edycja-rankingu-firm-tsl.pdf), (10.06.2017).

by *Gazeta Prawna* daily demonstrates positive changes that are taking place on the market. The growth pace of those companies that are included in the ranking measured by incomes from TSL operations was in the year 2015 over two times as high as the growth pace of GDP, and it was nearly 9 per cent (8.9 per cent). The other indicators were positive, as well. The growth pace of net fixed assets was nearly 16 per cent, and spendings on IT systems (measured as a percentage of the company's incomes) amounted to 9.5 per cent, and the net income per one person employed (employment productivity) was almost 20 per cent. The average profitability in this industry was on the level of 3.2 per cent as compared to 2.8 per cent in the year 2014. 37 of the companies included in the ranking declared the Polish origin of the capital, and the share of their incomes in total incomes was on the level of 45 per cent.<sup>15</sup> Table 12 present five TSL companies with the largest incomes in the year 2015.

The TSL companies referred to above stated that logistics is their principal activity and that they use all types of transport: by road, rail, air and sea, as well as combined transport. It is only DSV company that uses inland waterway transport.

**Table 2.** TSL companies according to the income criterio in the year 2015 from principal operations: logistics

Company	Income in 2015 (thousand PLN)	Employment in Poland 2015	Income dynamics (2014 = 100%)
Raben Group	2 144 406	4700	106.2
Schenker Sp. z o.o.	1 480 771	2522	103.66
Rohling Suus Logistics S.A.	604 529	942	104.9
DSV	544 033	695	105.71
Kuehne+Nagel	502 852	1593	112.5

**Source:** Author's own study based on data from a ranking of TSL companies in the daily of "Gazeta Prawna", No. 122, 27.06.2016, p. 7.

Apart from the Raben Group, their operations go beyond the European continent. Schenker Sp. z o.o. and Rolling Suus Logistics S.A. are companies with Polish capital. The Raben Group is 100 per cent Dutch company, DSV is a Danish enterprise, while Kuehne + Nagel is an Austrian company. All of the companies had a growth of their incomes as compared to the year 2014: with the largest in the case of Kuehne + Nagel: 12.5 per cent, and the smallest one in the case of Schenker Sp. z o.o.: 3.66. The Raben Group with the largest receipts

<sup>15</sup> „Gazeta Prawna”, No. 122 (4269), 27.06.2016 p. 6.

has the largest number of employees. The income per one person employed is the highest in DSV: PLN 782.78 thousand, Rolling Suus Logistics S.A. with PLN 641.75 thousand comes second, Schenker Sp. z o.o. with PLN 587.14 ranks third, the Raben Group with PLN 456.25 thousand ranks fourth, and the smallest value is in the case of Kuehne + Nagel: PLN 315.66 thousand.

## Comparative analysis of logistics services marketing

Local companies use the services of external companies based on outsourcing to provide products to customers on the territory of Poland and Ukraine. The formulation of the operating strategies of local companies is connected with an identification of the resources of the individual companies and their competent use, which may be of a tangible and intangible nature. At present, more and more significance is attached to intangible resources including the suppliers of logistics services, who have an influence on the company's final value, and they are often perceived by logistics operators through the prism of the service of consignees. Two logistics operators that offer their services on the territory of Poland: Rohling Suus S.A. and on the territory of Ukraine - Zammler were covered by the analysis. Table 3 presents the instruments of marketing for both of these capital groups on the territories of Poland and Ukraine. ROHLIG SUUS Logistics is one of those Polish logistics operator that provides logistics services to entrepreneurs at home on all the continents. The company started operations in Poland in the year 1989.

"ZAMMLER UKRAINE" LLC a reliable 3PL operator on the market of logistic services. "ZAMMLER UKRAINE" CJSC reorganized into "ZAMMLER UKRAINE" LLC. ZAMMLER became the first Ukrainian 3-PL operator, that combined all logistic services. ZAMMLER became the first Ukrainian 3-PL operator that combined all logistic services. Foundation of "ZAMMLER FULFILLMENT" LLC e-commerce logistics.

**Table 3.** Instruments of logistics services marketing for the selected logistics operators that provide services in Poland and Ukraine

Instrument	Poland – Rolling Suus S.A.	Ukraine – Zammler
Product	In the case of the RS in the first place propose solutions to road, rail, marine, including customs services.	In the case of Zammler they propose solutions to road, marine, air, rail transportation, customs services as well as full range of warehouse services

**cd. Table 3.** Instruments of logistics services marketing for the selected logistics operators that provide services in Poland and Ukraine

Instrument	Poland – Rolling Suus S.A.	Ukraine – Zammler
Promotion	The main activities: personal sales in the B2B sector and public relations. Webordering – a web portal for clients, used for placement of orders and management of stock orders	The main activities: personal sales in the B2B sector and public relations, in particular, charity..
Distribution	It maintains 200 regular road routes for a week. Creates logistic solutions for servicing supply chains including Philips – general cargo and full truck transport, inventory and security management (Tarnowo Podgórze – customs warehouse), Shanghai – Gdansk direct cargo group.	There are more than 100 agents in the group of companies all over the world. ZAMMLER Group Companies provide a whole spectrum of cargo transport services of any complexity in main direction of Europe, Asia, America and logistic as well as brokerage services (Ukraine, Poland, Chine).
Price	Prices set to customer requirements, valued in the case of contract logistics, supply chain operations and oversized transportation	Prices set to customer requirements, valued in the case of contract logistics, supply chain operations and promotion (discount) price for Chine – Ukraine transport The price is determined depending on the type of service.
Personnel	Qualified staff guarantees advice and professional service in the form of appropriate solutions at each level of cooperation. Human resources policy is guided by the principle "personality makes the difference"	The professional team of the company is always ready to help in solving all issues related to registration, transportation and storage of goods, and provide advisory assistance to the client. Personnel policy is focused on raising the professional level of employees.

**cd. Table 3.** Instruments of logistics services marketing for the selected logistics operators that provide services in Poland and Ukraine

Instrument	Poland – Rolling Suus S.A.	Ukraine – Zammler
Process	In the case of handling complex logistics projects, they will set up a dedicated project team that works within a single organization to ensure project delivery and effective communication. A dedicated supervisor supervises co-operation and is in constant contact with the client	In the case of warehouse logistics, they proposed an additional services (co-packing). Specialists will consult at the stage of concluding supply contracts, when processing documents, after completing customs clearance at any time of the day.
Quality: material certificate	They have a Quality Management System ISO 9001: 2008; Environmental Management System ISO 14001: 2004; HACCP	They have only Quality Management System ISO 9001: 2015. National Certificate "Industry Leader" 2012, 2016.

**Source:** Author's own study on the basis of the websites of logistics operators: <https://www.suus.com> and <https://www.zammler.com.ua/ru/>, (10.02.2017).

Rohling Suus has the following mission: “We treat all our Customers as our long-term business partners.” Their mission is to improve the efficiency of the basic business operations of their customers by supplying advanced logistical solutions. The firm believes that their services constitute a more efficient and economical alternative to logistical operations carried out by businesses using their own resources. They achieve goals primarily through the commitment and professionalism of their employees.

An essential principle of the work of ZAMMLER group companies is a corporate social responsibility towards their employees, clients and partner as well as society and the state on the whole. ZAMMLER group companies follow the ethical conduct of business openly and transparently, being guided by the “Corporate Code of Ethics” adopted by the company. The system of corporate social responsibility has been integrated into all internal processes of the company. This allows to constantly improve the system of quality management in order to meet the need of clients.

## Conclusions

Owing to the use of new technologies, TSL companies have been transformed into logistics operators and there have occurred changes to marketing-mix instruments. Enterprises have introduced changes concerning the services they provide and processes that cover customer service, distribution and the quality of services provided. The personnel have been adequately trained in the area of new technologies implemented. The research conducted shows that there are the smallest changes in relation to the promotions of services. Prices are established in relation to the individually offered logistics services. Both Polish and Ukrainian companies are making efforts to extend the market of the services they offer, taking into account in particular the Asian market (the Polish company) and the Chinese only (the Ukrainian company). In spite of the difference in time (10 years) in the changes introduced, both companies are dynamically entering the operation of the e-commerce market and the development of the systems of communication and information over the Internet. Owing to an adequate selection of qualified personnel, it is possible to offer the highest standards of customer service. The Polish and Ukrainian companies offer high quality and high reliability services taking into account the requirements of sustainable development and social responsibility principles; hence, the use of the rules of partnership, internal marketing and environmental protection treated as a priority.

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## MARKETING USŁUG LOGISTYCZNYCH W POLSCE I NA UKRAINIE

W artykule zostały opisane działania marketingowe stosowane przez przedsiębiorstwa TSL. Celem artykułu była analiza instrumentów marketingu na rynku usług logistycznych w Polsce i Ukrainie. Zastosowano analizę literatury i porównawczą oferowanych usług. Zaprezentowano rynek usług logistycznych w Polsce w porównaniu z rynkiem ukraińskim. Przedstawiono elementy marketingu realizowane w Polsce i na Ukrainie przez wybranych operatorów logistycznych oraz kształtowane przez nich instrumenty w obu tych krajach. W artykule zwrócono uwagę na kierunki rozwoju usług logistycznych i dynamikę zmian w wybranych przedsiębiorstwach logistycznych.

*Słowa kluczowe:* operator logistyczny, marketing usług, instrumenty marketingu.