

ОТРАСЛЕВАЯ И РЕГИОНАЛЬНАЯ ЭКОНОМИКА
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**ПРОБЛЕМЫ ОТРАСЛИ ГРУЗОВЫХ
АВТОМОБИЛЬНЫХ ПЕРЕВОЗОК
И ВАРИАНТЫ ИХ РЕШЕНИЯ**

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Аннотация.

Отрасль грузовых автомобильных перевозок – важнейшая составная часть транспортной инфраструктуры российского государства. Данная отрасль занимает важное место в социально-экономическом развитии Российской Федерации, так как обеспечивает не только удовлетворение транспортных потребностей общества, но и всей экономики, создавая при этом все необходимые коммуникационные условия, обеспечивающие территориальную целостность страны и единство экономического пространства. Также отрасль грузовых автомобильных перевозок играет большую роль в обеспечении обороноспособности страны и национальной безопасности государства. Рассматриваемая отрасль обеспечивает к тому же все те необходимые коммуникационные условия, которые помогают в максимальной степени использовать выгодное географическое положение Российской Федерации, поддерживая внешнеэкономические отношения и обеспечивая возможность интеграции нашего государства в мировую экономическую систему.

Процесс перевозки груза является одним из самых сложных процессов, связанный с транспортной деятельностью, на организацию которого уходят значительные финансовые средства грузоперевозчиков. Как и в любых других процессах, в перевозке грузов возникают значительные проблемы, с которыми сталкивается каждый грузоперевозчик.

В статье рассматриваются проблемы регулирования рынка грузовых автомобильных перевозок, которые в конечном итоге несут отрицательные последствия для всего государства, в связи с тем, что это приводит в итоге к несоблюдению законодательства, неполной уплате налогов, повышению показателей аварийности. Вскрыты недостатки и обоснованы предложения по регулированию рынка перевозок крупногабаритных и тяжеловесных грузов. На основе проведенного анализа сформулированы предложения по развитию потенциала российской отрасли автомобильных грузоперевозок.

Ключевые слова: автомобильный транспорт; рынок грузовых автомобильных перевозок; «теневой» рынок; государственное регулирование рынка; международные перевозки; парк автомобилей; система «Платон».

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**PROBLEMS OF THE ROAD CARGO TRANSPORTATION
INDUSTRY AND THEIR SOLUTION OPTIONS**

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Abstract.

Road transport is the most important part of the transport infrastructure of the Russian Federation. Road transport plays an important role in the socio-economic development of the country, ensuring the satisfaction of the transport needs of the population and the economy, creating the necessary communication conditions to ensure its territorial integrity and the unity of the economic space. Road transport is of great importance for ensuring the defense capability and national security of the country. It also creates the necessary communication conditions for the use of Russia's advantageous geographical position, providing foreign economic relations and the possibility of integrating the country into the world economic system.

The process of cargo transportation is one of the most complex processes associated with transport activities, the organization of which takes significant financial resources of cargo carriers. As with any other process, there are significant challenges that every trucking company faces in the transportation of goods.

The article deals with the problems of regulation of the road freight transport market, which ultimately have a negative impact on the state, as they lead to incomplete payment of taxes, non-compliance with legislation, and high accident rates. Shortcomings are revealed and proposals for regulating the market for the transportation of bulky and heavy cargoes are substantiated. Based on the analysis, proposals for the development of the potential of the Russian road freight industry have been formulated.

Key words: road transport; road freight market; "shadow" market; state regulation of the market; international shipping; car park; Plato system

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Introduction

Road transport is an important part of the transport system of the Russian Federation, the effective functioning of which creates the necessary conditions for the modernization and innovative development of the na-

tional economy, to ensure that the transport needs of the population are met, as well as for Russia's integration into the world economic system. Road transport also determines the ability of the state to create conditions for equalizing the socio-economic development

of the regions and ensuring the connectivity of the state's territory.

The task of modernizing the Russian economy provides for a transition from an export-raw material to an innovative socially-oriented development model, the creation of conditions for the integration of the Russian Federation into the world economy, the transition to a full-scale implementation of import substitution programs in the country's economy. Under these conditions, increasing the requirements for the quality of transport services and ensuring the safety and sustainability of the functioning of the transport system is a modern challenge facing road transport, requiring a clear definition of priorities, goals and objectives for the development of road transport, as a sub-sector of the country's transport complex.

The study used the methods of economic analysis, factor analysis of indicators. To study the causes of changes in indicators of economic activity, the method of logical deduction was used.

The main part

The share of road transport accounts for more than 60% of the total volume of passenger traffic (excluding personal vehicles) and about 54% of the total volume of freight traffic. Road transport is the main mode of transport in ensuring the mobility of the population for labor, domestic and cultural purposes.

At the same time, despite the fact that the level of urbanization in Russia corresponds to the world level, the mobility (mobility) of the population in road transport (the average number of movements per inhabitant per year) in Russia is still less than in developed countries. Insufficient transport mobility of the population is one of the main obstacles to reducing tension in the regional labor markets [Турлаев Р.С., 2021].

The predominant part of Russian road carriers belongs to small and medium-sized businesses.

Road transport is of paramount importance in the transport support of Russia's foreign trade activities. Road freight transpor-

tation is carried out in communication with more than 45 countries. The share of Russian carriers in the volume of international road transport of goods accounts for 46% of goods [Муравьева М.А., Лужецкая А.В., 2018].

The total capacity of the Russian sector of the international market for road transport services is about 1.2 billion dollars.

Today, about 7 thousand Russian transport companies with a total fleet of about 70 thousand vehicles are involved in the market of international road transport services. Of these, at least 4.5 thousand organizations with a total fleet of 50 thousand vehicles carry out international transportation of goods on a permanent basis.

Road transport is a significant consumer of labor resources. Only in large and medium-sized auto enterprises providing freight and regular bus transportation, 437 thousand people are employed, about 70 thousand people are employed in taxi transportation. The total number of workers employed in the motor transport sub-sector is about 1.7 million people [Транспортная стратегия, 2022].

Road transport is a major consumer of material resources. It is the main consumer of the products of the domestic automotive industry, whose share in GDP is estimated at 1-2%. Road transport annually consumes up to 65 million tons of liquid automotive fuel for an estimated amount of about 2.5 trillion. rub.

Among the main advantages of road transport, allowing it to successfully compete with other modes of transport, the following should be noted:

- wide range, high level of geographical and technological accessibility of motor transport services;
- a wide range of applications for the range of distances for the delivery of passengers and goods, for the types of cargo carried, the batch delivery of cargo;
- a wide variety of used vehicles, allowing to ensure the fulfillment of almost all the needs of the transport services markets;
- the possibility of delivering passengers and cargo "from door to door" without additional transfers or reloading along the route;

- the possibility of providing sufficiently high speeds for the delivery of passengers and goods;
- the possibility of prompt change of routes and traffic schedules;
- non-alternative use for transport services of enterprises that do not have access roads other than highways;
- more flexible pricing compared to other modes of transport.

The main disadvantages of road transport compared to other modes of transport include:

- lower opportunities for state regulation and control due to the large number and territorial dispersal of subjects of motor transport activities and vehicles;
- relatively lower productivity of a rolling stock unit;
- high need for personnel (36 % of all those working in transport are employed in motor transport);
- lower level of transport and environmental safety, higher specific fuel consumption (per ton of transported cargo, per passenger).

The intensive growth in the number of cars leads to a number of negative consequences – to an increase in the number of traffic congestion and overload of urban street and road networks, an increase, in connection with this, in the delivery time of goods and passengers, an increase in emissions of pollutants from road transport, a decrease in the level of road safety, growth in total fuel consumption and emissions of climatic gases

[Глушак Н.В., 2015].

An analysis of the current state of the road freight transport industry allows us to draw the following conclusions:

- about the strong fragmentation of the market. The leading players, that is, those included in the TOP-10, account for only 16% of the total volume of traffic in the Russian Federation. At the same time, only 10 companies out of the total number can be classified as large, and this corresponds to only 8%. More than 90% of enterprises have less than 50 trucks, and in most cases their legal form is IP. [Батищев И. И., 2019] The dominance of individual entrepreneurs and small players makes it impossible to attract borrowed capital. In view of this, the cargo transportation market as a whole is not of interest to the banking sector, which means that it is deprived of powerful financing;

- the difficulty in recruiting staff. Basically, professional drivers are older people, because this profession is not prestigious among young people;

- about the obsolescence of car parks. According to MOES, half of the trucks are not in demand, while most of them are depreciated, that is, they should be written off. However, they continue to be used. Thus, according to the report of the analytical agency AUTO-STAT [Динамика объемов, 2022], the volume of sales of new trucks in Russia in 2021 decreased by 16% (compared to 2020) and amounted to 5,126 units against 6,095 units. A more detailed annual dynamics of truck sales is presented in table.

Таблица

**Динамика продаж грузового транспорта в Российской Федерации, тыс. единиц
 [Динамика объемов, 2022]**

Table

**Dynamics of sales of freight transport in the Russian Federation, thousand units
 [Volume dynamics, 2022]**

Indicators	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Units	128.9	110.7	87.9	51.1	53.3	80.2	82.3	80.6	74.8	97.9
Chain growth rate, %		85.8	79.4	58.1	104.3	150.4	102.6	97.9	92.8	130.9

According to Table, in 2020 the volume of the market for new trucks amounted to 74.8 thousand units, which is 7.3% lower than in 2019. The positive dynamics in 2021 is due to pent-up demand, the launch of infrastructure projects and the growth of housing construction. In 2022, the market size will either increase by a few %age points or remain the same. Today, the demand for trucks is mostly satisfied, no new infrastructure projects are planned yet. The market is more or less saturated. Thus, there is a trend towards a further decrease in the renewal of the truck fleet in Russia, which leads to an increase in the period of ownership of a cargo vehicle, and hence to more frequent maintenance and repair. According to AUTOSTAT [Динамика объемов, 2022], the average age of road freight transport in Russia as of 2020 is 21.2 years, and 64.7% of all road freight transport is over 15 years old. It should be noted that this is one of the highest indicators of the average age of transport relative to other industries.

This state of affairs raises a number of difficulties. On the one hand, the problems of personnel, market fragmentation and obsolescence of vehicles, and on the other hand, the ever-increasing demands of consignors and consignees for the quality of service and the level of safety. As a result: the growth of e-commerce, the increase in demand for logistics services, the tightening of requirements for the execution of accounting documents. Another important fact is the appearance of the effect from the introduction of the Platon system, that is, the strengthening of tax administration. It is also impossible not to mention the introduction of weight and size control [Малевич Ю.В., 2019].

Obviously, in such conditions, the shadow side of the market is developing at a rapid pace. According to experts, in order to solve this problem, it is advisable to exclude the possibility of buying large-capacity freight vehicles by individuals, that is, in private ownership. Another problem should be added to this – the active spread of one-day companies and "gaskets", that is, outright dumping. Of course, a ban on the purchase by individu-

als of trucks weighing more than 12 tons cannot be called a market measure of influence. However, only if unified requirements are applied to all players in the field of cargo transportation, it is possible to eliminate gray and fraudulent schemes. By the way, since December 2018, in accordance with the Federal Law of December 20, 2017 No. 398-FZ "On Amending the Federal Law "On Road Safety" in terms of establishing additional requirements for ensuring road safety when transporting passengers and goods by road and urban ground electric transport", the entire motor transport community will work according to the same rules [Ключевые проблемы, 2022].

Conclusion

Who should be responsible for the development of road freight transport? This question is still rhetorical to this day. Experts argue that problems in the cargo transportation industry have a negative impact on the state as well, as they lead to incomplete payment of taxes, non-compliance with legislation, and high accident rates. Low barriers to market entry result in unfair competition and a significant decline in service quality and safety. The only solution is to create a common management system for the freight transport industry, which will allow:

- calculate the impact of this area on the economy of the carrier and the country as a whole;
- improve the situation in the domestic transportation market by bringing national legal norms closer to international ones;
- to prevent the development of gray business schemes.

Loss of cargo, non-compliance with the terms of the contract during transportation and other problems are familiar to many. However, they can be avoided if you check the counterparty. For this you need:

- to form a dossier on the carrier, the development of modern information technologies makes it possible to do this without much effort;

- get acquainted with the statutory documents, as well as forms of mandatory accounting reporting of a business partner;

- use modern risk management systems.

Of course, the gradual introduction of state information systems (ASVGK (automated weight and dimension control system), Platon and others) will create conditions under which the bulk of carriers will be forced to work safely and efficiently, which means that it will globally change the state of things on the market. But this will take about 5 years. Therefore, for now, business partners can only trust each other, but at the same time check [Батищев И., Низов М., 2022].

Unfortunately, not all carriers delivering goods in excess of the established norms for the weight and axle loads of a car acquire the necessary paid permits. As a result, significant damage is caused to the road network of our country, and it is not compensated. In the opinion of representatives of the state authorities, the punishment for such violations should:

- improve the situation in the industry, that is, significantly reduce the number of violations;

- ensure the flow of funds necessary for the development of the industry.

Please note: at the moment, penalties are already imposed at 5% axle overload. This does not exclude the penalty for general overloading of the vehicle. Accordingly, with the new calculation method (it takes into account the region and season), a fine for damage to Russian roads can ruin a small organization. And it is becoming more and more difficult to avoid control, since automatic weight and size control posts have already become widespread. By mid-2018, about 125 such stationary points were introduced. Statistics show horrific figures: today about 1/3 of cars move with an overload. And it is important to understand that all participants are interested in the development of systems that provide control over the parameters of the cargo – motor transport organizations, the state and manufacturers of the corresponding equipment [Гурьева А.А., 2020].

According to experts, on-board weighing devices should be used together with GLONASS monitoring systems. And this is beneficial not only for the state, but also for the carriers themselves. The devices allow monitoring during loading, unloading and throughout the entire route of the vehicle. Thus, the scales will always be with you. This will enable:

- improve the safety of cargo transportation;

- to ensure the optimal mode of operation of vehicles, that is, to protect them from premature wear;

- control underload;

- make payments between enterprises for transportation services based on real data;

- save the time required for the implementation of loading and unloading procedures.

As a result, transportation is guaranteed to be carried out in accordance with legal restrictions on axle loads, weight and dimensions.

Thus, it can be stated that road freight transportation has problems, however, a modern approach to transportation, the tireless work of professionals makes all of the above difficulties surmountable.

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