SWP 18/92 CUSTOMER DEMAND FOR TOTAL LOGISTICS MANAGEMENT: MYTH OR REALITY?

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Customer Demand For "Total Logistics Management" - Myth or Reality?

1. Introduction - Defining The Problem - What is Logistics Management?

Several definitions exist, both academically and practically based, but a relevant definition from Gray (1981) is "The Logistics approach is an integrated approach adopted by business management in some firms which attempts to make overall cost savings by considering the various functions of transport, inventory control, communications, warehousing etc as an integrated system." The number of different components within the Logistics system definition varies from firm to firm.

Bowersox (1974) states that Logistics is "the process of managing all activities required to strategically move raw materials, parts and finished inventory from vendors, between enterprise facilities and to customers" making an all embracing system possible, but Van Buytenen (1976) whilst superficially agreeing, points to a major shortcoming, saying that logistics is "An integrated approach where cost savings are identified by considering the total costs of the system. This approach already implies the need for overall management since the decisions about the different elements of the logistics system (transportation, inventories, facilities, utilisation, communication) are traditionally made within different functions or departments."

Such definitions, however, are somewhat outdated, concentrating as they do on cost savings; more modern definitions focus more on value added. More up to date is Plunkett (1991) - "logistics includes all the value added activities, beyond the simple physical transport of goods from A to B, which are involved in getting raw materials and components to manufacturers and finished products into the market place. So the definition would include informatin technology systems, warehousing operations and any other services ptoentially involved in supply chain management."

The CLM definition as used by various American service providers, offers two alternatives - "Planning, implementing, measuring and managing the efficient and effective utilisation of product, financial and human resources used in the ordering, manufacturing and physical distribution flow."

Or alternatively - "Supply chain and distribution channel management directed to meet customer goals or satisfaction and quality."
The lack of this "overall management" in many firms militates against the adoption of an integrated logistics approach in most cases.

2. Role of Different Functions or Departments, Within Firms Seeking "Logistics Managment Services"

As those of us on the supply side of logistics management services know from experience, it is fiendishly difficult in many organisations at the present time to introduce the concept of total logistics into discussions with existing or potential customers. Freight forwarders, hauliers, shipping lines etc, despite their efforts to diversify horizontally into various modes and services, often find it difficult to convince customers of the need to adopt an integrated logistics approach, let alone of the suitability of their own service providing company to fit the bill. Hayuth (1987) neatly encapsulates the opportunity and the problem; shippers and transport operators should be adopting the logistics approach but do they?

"Transportation has for years been recognized, among its other roles, as a sub-function of logistics. The inter-relationship between logistics and transportation has now been so greatly strengthened that many even regard logistics as being synonymous with physical distribution, both involving pre-production and post-production control of material flows. Today it is obvious that neither shippers nor transport operators can consider transportation and logistics individually. The decision making process in one of these disciplines exerts a great effect on the other."

Unfortunately many firms do not realise the importance of this relationship, and consider international transportation and logistics totally separately. This stems from a historical, pre-globalisation, perspective, when logistics was primarily, if not purely, a domestic function. Hayuth (1987) sets the scene.

"Since the 1970s, particularly during the later part of that decade, the traditional structure of the world economy has shifted in a direction that is quite clear - the internationalization of production. The emergence of a global system of production fosters, among other things, an increase in the size of individual firms engaged in production for international trade, certainly an expansion of the spatial scale of their operation The development of the multi-national corporation is, on the one hand a significant outcome of this trend: on the other hand, it is a major catalyst for the process of production on a global scale. Multinational development means more than just the addition of foreign subsidiaries to a company in one of the developed countries. It represents, in most cases, a complicated, sophisticated, and highly coordinated production and distribution chain.

For example, the selection of a specific location for a plant of such a corporation is based in large measure on the relative advantage of each and every site considered, no matter where on the globe, in terms of capital incentives, labour and transport costs, and accessibility. It is the aggregate locational preference of many multinational corporations that is responsible for the shifts in international trade."

Cook (1967) made a study of domestic transport needs and decision making which, 25 years on, is depressingly relevant. He concluded, inter alia,

"The decision making process did not conform closely with what might be expected by a student of the classical theory of the firm .... The historical development of the firms and the personal qualities of managers are significant factors in explaining these differences .... The transport department is, in general, considered of rather less importance than production, marketing and purchasing departments; and receives rather less attention. There is a feeling that profits are not made in the transport department, although they may be frittered away there."

In many firms, the shipping function stands at the end of the production line with no input into what went before. It is expected to solve earlier problems e.g. massage out delays in production with speedier transits and/or modal changes. There is precious little evidence of an integrated logistics approach in the majority of firms, which is hardly surprising in an industrial scenario which often sees exporting as something to be avoided at most times and to be concentrated on desperately at others. - "Export your way out of recession." Herein lies the problem and opportunity for logistics service providers.

Because of the compartmentalised structure of many firms, the overall management approach needed to implement a total logistics strategy - interaction between, for example, purchasing, production, marketing and shipping departments - is often lacking. However there is a possibility that a logistics service provider can overlay the interaction and inter departmental communications necessary through implementation of a logistics partnership.

3. Logistics Partnerships

According to Pineo (1991) a logistics partnership "is an agreement to subcontract part of the material chain management to specialist operators. It can be components prior to the production, finished product, spares or peripherals, literature and returns .... The supplier becomes an "extension" of his customer's business providing property - warehouse or distribution centre - services and people to run these operations." This clearly shows that, except in the case of new business startups, integrated logistics systems can often only be developed by changing existing operations by integrating their management or by deliberately contracting out as much as possible of the logistics functions. In recent years moves by some firms to concentrate on "core business" has led them to contract out warehousing, distribution etc. But even then many still regard domestic logistics as totally separate from international logistics and will employ a number of different subcontractors to handle different elements of the supply chain.

A recent article in Containerisation International (Crichton 1991a) raised this.

"Customers are said to want all the value added extras ...... But are they actually using them? And are lines taking this route because of genuine shipper need, or because it's where the competition is going?" Matsushita, K-Mart, Toyota and Nissan are given as examples of companies with no requirement for third party domestic logistics.

Crichton (1991b) refers to the example of Japanese line NYK seeking to become what it calls a "logistics megacarrier" offering "high-value-added, fully integrated, comprehensive transportation and distribution services covering sea, land and air movements, together with all form of logistic services along the distribution chain, including sophisticated inventory control and information systems to monitor and control distribution activities" - a somewhat laborious definition of "total cargo management." How many customers would want all of it? Or just some? For, as we have seen earlier, there is little precedent for such a multi-modal international logistics offering. Yet surely the time is right, against a growing background of realisation of the importance of integrated logistics approaches, for such offerings? But given the conservatism of UK firms, the UK's continued reluctance to control its exports through CIF/franco domicile pricing, and the failure of much of British industry to view logistics as the "integrated system" (Gray 1981) it is not easy to predict the responses of UK customers to an integrated logistics offering.

One of the major inhibitors to Logistics partnerships in the UK in particular is the adversarial nature of much of the relationship between service providers and customers. Many customers see their role as obtaining as much as possible from the service provider at as little cost as possible - the "more for less" approach. Very few organisations are yet fully ready to adopt the partnership approach, although as the movement towards Total Quality Management gains impetus, the Deming philosophy of reducing the number of suppliers in favour of greater cooperation and partnerships is becoming more accepted.

Davies and Gray (1980) surveyed members of the Society of Shipping Executives and received 392 replies. 82.6% of respondents agreed that "It is good policy to use forwarders who are specialists in particular markets, rather than those with general coverage."

54.7% preferred small forwarders, and 79.8% did not believe it is good policy to place all export business in the hands of a single freight forwarder. These views would tend to militate against the "logistics approach".

In the same survey, questions were asked about other areas of involvement of shipping managers. Whilst 83% said they made important decisions on export shipping, only 56% made important decisions on import shipping, 34% on domestic transport (and a significant 40% said they were not involved at all), only 25% made decisions on warehousing (with 44% not involved at all) and 13% made decisions on stock management, with 68% not involved at all. This fairly typical multifunctional approach, with different departments responsible for different elements of the logistical chain, again militates against the "logistics approach".

Of course Davies + Grays (1980) is now rather old research but at first glance much of it still holds good. It does however need updating, which will form part of the current author's research work.

4. Some Conclusions

High volume operators - shipping lines, European Hauliers, warehousekeepers - would appear to be better placed to convince users of their logistics capabilities than, for example, lower volume airfreight consolidators. But because the customer base of airfreight consolidators tend to concentrate on higher-value commodities which tend to be less "traditional" (computer components, fashion goods, garment, records, books) it may be possible to offer tailored single-user logistics packages to such organisations. Lower volume users may also not have already invested significant sums in own account transport and warehouse facilities, thus being less reluctant to subcontract logistics services. Crichton (1991 a+b) in these articles examines the logistics strategies of several large shipping lines - in particular the Japanese trio of NYK, K-Line and Mitsui-OSK Lines, along with American giants Sea-Land and APL, - and contrasts their strategic intent to become "logistics megacarriers" with the actual response of a number of customers to the various "value added services" provided.

Crichton's conclusions are that few customers are interested in the full range offered; some are interested in, for example, intermodal block double stack train capability into the Mid West (although some customers - Nissan, Toyota, larger American department stores - claim to have sufficient volume to operate their own dedicated trainloads); there appears to be a need for value-added service on less than container load movements (but LCL cargo does not fill warehouses!). His main conclusion is that the provision of "value added logistics services" by shipping lines is more a response to competition, a way of obtaining competitive edge, than a response to actual customer demand for these services.

This conclusion needs to be tested further by research, and this area is of great interest to the current author who will be developing this theme further.

The author's continuing research will explore these and other areas of international logistics - a fast moving, developing and changing area of management studies.

Lawrence Cummings

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