Amelioration in Odisha's Goods Transport Industry: Learning from Modern Transporters

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ABSTRACT

Driverless Tesla trailers on US National Highways, Zomato, Swiggy and Dunzo getting DGCA's approval for drone-deliveries, autonomous trains going faster than the speed of a Formula 1 car are all luxurious problems that the Wild West and highly urbanised Indian metropolitan cities have to worry about. When it comes to ensuring sustainable daily supply of salt, spices, milk powder, biscuits, tea leaves, and dairy products, medicines among other essentials, to the most underdeveloped villages of Odisha at optimum lead times and cheap prices, the transport industry of Odisha has a long way to go. This paper aims at finding out the types of transporters for consumer goods in the Odisha market at present the types of services they offer and if and how modern transporters are giving the reputed traditional transporters of the State a run for their money. Modern transporters employ technology and have strong pan-India presence so the local transporters who have historically worked out of one State only primarily are finding it tough to compete with them. While the modern transporters are high on financing their services and tech, the traditional local transporters know their local markets and governing bodies best. However, can Odisha's own learn and grow from this opportunity or will they succumb to these giants and perish?

Keywords: *Logistics, Technology in transportation, Transport industry.*

INTRODUCTION:

Logistics is the process of organising, carrying out, and managing the smooth movement and storage of products, services, and associated information from the point of origin to the site of consumption in order to satisfy client needs. It is true that industrial activities are not the only ones that use logistics. Any businesses, including those in the public sector, the private sector, and financial service providers, can use it(Lambert 1998, 3.)

There are two distinct logistical functions in business. It can focus on the movement of materials from the point of origin to the point of consumption internally (inbound logistics) or externally (outbound logistics). Inventory management, buying, shipping, warehousing, consultation, as well as the arranging and planning of such operations, are among the primary responsibilities of skilled logistic managers (Shamim 2009, 2).

The government is continuously pushing for more and more production by home-grown brands and has rolled out numerous incentives to MSMEs and aspiring entrepreneurs to boost the state's and India's overall domestic product. Big, often unfathomable figures are

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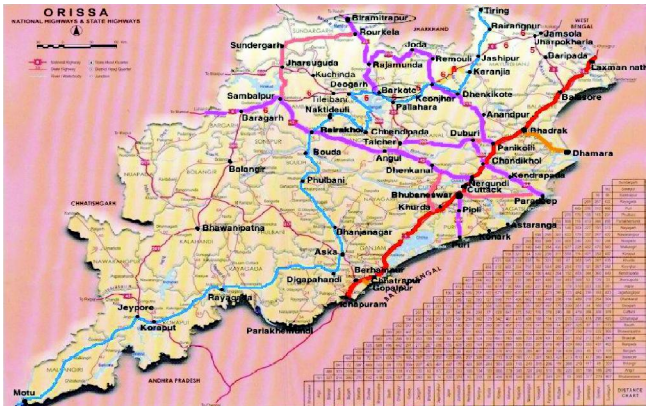
thrown around in press conferences but what most people don't realise is the importance of the logistics and transport sector in facilitating this prospective growth. The fact that even during the strictest COVID-19 induced lockdown of the world, Indian highways saw absolutely no restriction in the movement of goods trucks. Lakhs of families got uninterrupted supply of daily essentials, even somewhat luxurious essentials like coffee, chocolates, etc. during the lockdown, all thanks to the brave and hardworking transport industry.

The importance of this industry cannot be overstated by saying that while everyone was working at the comfort of their homes, transporters were busy loading and unloading goods trucks in peak Odisha coastal summer.

Not only is the transportation industry responsible for direct economic growth of the state, it also massively contributes in the development of quality of life – the standard of living. Who would have thought 20 years ago that America's biggest confectionery manufacturer's lollipops, Jolly Rancher, would be available in betel shops in Banki?We are sure the villagers of Tangi who used coconut oil in winters would have never gotten their hands on German made Nivea cream if Odisha did not have a good transportation and logistics network. Not stealing the thunder of 1991's economic reforms and the famed LPG, but would LPG have been a grand success for the lack of a robust transport industry?

In Figure 1 below, Nergundi near Cuttack is the hotspot of most transportation and warehousing activities. We visited 5 FMCG companies' warehouses which were all located in Nergundi and 4 transporters had their offices in Nergundi as well. This is the ideal choice of most businesses as it lieson National Highway (NH)16, with great connectivity to not only entire Odisha but also to Kolkata and Chennai, which are major production hubs.

Figure 1:



Furthermore, an efficient transportation and logistics network also works as a cost saving measure for companies, not only in terms ofpossiblereduced freight costs but also in terms of saving financing costs. Companies can reduce their working capital needs by reducing warehouse spaces, inventory holdings and receivables if distribution efficiency is enhanced. Marketing comes as an add-on as quicker deliveries give considerable competitive advantage to the companies who can pass on all these benefits to the consumers ultimately.

Classification of Transporters:

For the purpose of this paper, modern transporters can be defined as those who were established within the last 2 decades with considerable technological integration in their operations. In addition to that, modern transporters, in this paper's context, are established outside of Odisha and have an operation base in Odisha. This is important as we are trying to study how external organisations to the state are impacting home-grown companies.

Traditional transporters of Odisha on the other hand are those that were established in Odisha and have primarily worked intra-state in Odisha since the last 20+ years. They are more labour intensive than their modern counterparts and have only recently started integrating technology with their operations, but that too is at a very nascent stage.

Some Modern Transporters who have been frequently exemplified in this paper:

1. Om Logistics – Estd. 1999
2. Rivigo Services – Estd. 2014
3. Gati Logistics – Estd. 1989
4. Delhivery Logistics – Estd. 2011

Some Traditional transporters from Odisha:

1. Great India Roadways – Estd. 1974
2. South India Transport Agency – Estd. 1980
3. Laxmi Logistics – Estd. 1976
4. Pragati Logistics – Estd. 1998

While the technologically promising transportation companies may seem to be the elixir of all logistical issues, there is no sure-sort guarantee that they live up to their

expectations. Even if the technology is there, the users and providers need to be technologically abled. With 77% literacy, it will be too much to expect competence on the technological front by employees who get paid dismal remunerations for their work.

Green logistics is an important emerging concept and one that we have arguably no focus on. It is extremely important to build a network of sustainable transportation. When there is cut-throat competition with respect to delivery times, often goods vehicles ply with less than 100% load capacity so as to meet delivery deadlines. In such a situation, the carbon footprint of those goods is considerably higher. Transporters must find out a way to ensure least possible instances of partially loaded vehicles and try to load any vehicle with optimum level of part loads. If part loads are not practical, then smaller capacity vehicles should be used. However, this would need vast integration among various transporters who may be competitors and unwilling to cooperate for the greater good of sustainable transportation. Albeit this could save costs for everybody, human nature may get the better of them. It is although possible for the government and other governing bodies like Unions to step in for mutual cooperation and integration as a short-term measure.

Several earlier research looked at different aspects of transport costs, performance appraisal, etc. Different types of studies have different objectives, which has an impact on their viewpoint, methodologies, and scope and evaluation studies. These studies are mainly focused on direct market costs, such as road construction and maintenance, travel time, operating costs for vehicles, and crash damages, and how these vary depending on the type of vehicle and road conditions. Environmental implications, typically air pollution but occasionally include noise and water pollution, and different categories of land use impacts are included in other sorts of research. Several research solely took external expenses into account. Their conclusions frequently differ greatly, although they can typically be explained by discrepancies in their technique and scope.

The operational performance, service quality and dependability, cost analysis, cost-fare linkages, profitability, and interrelationship between physical and financial performance of eleven STUs chosen based on their size under six categories were all examined by Sastry (1975). The State Road Transport Companies' early operational performance was investigated in this research.

In a study, Mahesh Chand (1982) examined the financial results of 25 public road transport projects that were run as corporations and companies from 1975 to 1980. The performance of just one year, 1979–1980, was used to rank the STUs. Moreover, only four variables, including cost per vehicle kilometre, revenue per vehicle kilometre, revenue capital ratio, and revenue ratio, could be compared across STUs.

In order to track the final impact of seasonal fluctuations in the parameters that affect cost and revenue on the cost-fare relationships of specific STUs, Murthy (1986) investigated these variations and offered ways to reduce deficits. Over the period 1983–1984, seasonal impacts on different revenues, losses, operational costs, income per kilometre, etc., were investigated.

By taking into account the depot as a profit centre, information characteristics, and a good record keeping system created as record data information, Venkata Narayan (1992) studied the management information system at the depot level. As part of strategic planning, forecasting, tactical planning, and organising at the depot level, documentation at a depot, etc., were examined.

Mohanty (1992) investigated the administrative structure, resources, and system approach to STU bus transportation. He made specific notice of the structure's MIS and PJP approach for scheduling. In order to reduce operational costs and increase profit, he also stressed the many decision-making models that may be used when there is ambiguity.

Per Kageson (1993) examined the "Getting the Prices Right; A European Plan for Having Transport Pay its Real Costs, European Federation for Transport and Environment" (www.transportenvironment.org). The expenses of infrastructure, pollution, and accidents are estimated for European nations in this research.

Nine STUs were compared among one another in Pathak's (1994) study. He believed that the performance assessment of STUs should not be based on profitability. As a substitute standard by which to gauge effectiveness, he proposed the value added notion. In order to measure productivity, he employed factor productivity methodologies.

Patrick Decorla Souza and Ronald Jensen-Fisher (1997) "Comparing Multimodal Alternatives in Major Travel Corridors" Transportation Research Record 1429, TRB (www.trb.org), pp. 15-23. This study develops estimates of various costs for comparing investment alternatives.

Thomas BueBjorner (1999) estimates the external costs of freight and came to the conclusion that these costs—air pollution, noise, accidents, and congestion—are roughly fourfold more for one truck-kilometer compared to a private automobile.

Issues of the STUs in India's economy, finances, and technology were covered by Thomas (2000) in his book. He performed a thorough examination of the variables affecting the financial success and process efficiency of STUs in India. In addition to providing a useful description of historical perspective, his work includes extensive factual data on operational and financial performances.

In his work, Mohanty (2005) analysed the Orissa State Road Transport Corporation's performance. His research's goal was to assess OSRTC's effectiveness, and he offered workable solutions to raise effectiveness levels.

M. Maibach, (February 2008) gave a complete overview of ways for calculation and internalisation of external cost and suggested a set of methods and default values for assessing external costs when conceiving and executing transport pricing policies and schemes. It outlines procedures for figuring up external cost estimates and provide the best input values that are currently available for this computation (such as the value of a life year lost) and preset external cost unit values for various traffic circumstances (e.g. quantifying pollution in cost per kilometer).

Thallera, C ,Moraitakis, N. et al. (2012)Suggested that cooperation within the clusters of logistics in India should be established and intensified. According to them, in the area of logistics and transport, specialised training like in engineering is very rare, since there is a lack of specialized educational training institutes in this sector. This is also an integral part of our findings in this paper. Further, they laid down guidelines for elaborate collaboration for further research and discussion with German scholars for improvement of logistics system in India using the help Indo-German partnerships.

Supply chain management, according to Mishra, M., and Das, C. (2015), is defined by control that is based on networking and integrating processes across operational, regional, and institutional touchpoints. In their opinion, the transportation sector belongs on the concurrent list of the constitution, and they made a list of 23 proposals. For the expansion of freight transportation, they recommended facilitating greater private investment with stronger flexible credit facility. We have made an effort to more thoroughly comprehend the need for additional funding for Odisha's carriers. They also placed a strong emphasis on enhancing the infrastructure, which was one of the main things we saw throughout our field trips.

In their article on the SCM of the cotton sector in Odisha, Dalei, N. and Gupta, A. (2015) discovered that there was no effective mechanism for ticket-sized consignments, which resulted in significant losses for smaller farmers. Delivery of smaller consignments is a major concern in other companies, such as those who deal with FMCG items. They recommend that actions be initiated on behalf of the public sector, particularly the organisations that are active in that area for the specific sort of work, to establish a successful and practical supply chain management system.

Need and Relevance:

Transporters of the state contribute majorly to the economy of the state, both directly and indirectly. Being complacent in such a competitive market may prove to be fatal for the home-grown transporters. We have tried to point out areas where some lessons can be learnt and while it may not be possible to completely imitate the praxis of modern transporters, the best elements should be extracted.

Objectives of the Study:

This paper aims to point out a few indicators where traditional transporters have scope for improvement. All such indicators are in context of how the modern transporters carry out their job. Other differences in terms of service times and rates are also studied to find out if there is a disparity in promised service qualityand rates as well, apart from infrastructural and technological differences.Apart from these, the type of services offered by transporters in the state with respect to FMCG products in particular is also studied.

Types of Services Offered by Transporters:

The various transporters in the state (for consumer goods) can be classified roughly into Full truck-load (FTL) and Part truck-load (PTL) service providers. FTL providers only provide the entire lorry space for their clients. No partial booking of the space is allowed. Depending on the load requirements, they offer various sizes and types of vehicles to their clients who may choose the one best suited to their needs. Currently in Odisha market, the following types of trucks are commonly used. As seen in Table 1, customers can pick

the vehicle of their liking depending on their load requirements.

Table 1: Types of Trucks and their Load Capacity

TRUCK TYPE	SIZE (FT)	MAX WEIGHT
TATA ACE ZIP	5.5 L x 4.8 W x 2 H	Max Load 600 Kgs
TATA ACE	7 L x 4.8 W x 4.8 H	Max Load 850 Kgs
ASHOK LEYLAND DOST	7 L x 4.8 W x 4.8 H	Max Load 1 Ton
MAHINDRA BOLERO PICK UP	8 L x 4.8 W x 4.8 H	Max Load 1.5 Ton
TATA 407	9 L x 5.5 W x 5 H	Max Load 2.5 Ton
EICHER 14 FEET	14 L x 6 W x 6.5 H	Max Load 4 Ton
EICHER 17 FEET	17 L x 6 W x 7 H	Max Load 5 Ton
EICHER 19 FEET	19 L x 7 W x 7 H	Max Load 7/8/9 Ton
TATA TRUCK (6 TYRE)	17.5 L x 7 W x 7 H	Max Load 9 Ton
CONTAINER 20 FT	20 L x 8 W x 8 H	Max Load 6.5 Ton
CONTAINER 32 FT SXL	32 L x 8 W x 8 H	Max Load 7 Ton
CONTAINER 32 FT MXL	32 L x 8 W x 8 H	Max Load 14 Ton
CONTAINER 32 FT SXL / MXL HQ	32 L x 8 W x 10 H	Max Load 7/14 Ton

Source: Truckguru.co.in

FTL providers not only provide secondary transportation (from the distribution warehouses to wholesalers/ retailers) but also provide primary transportation (from the manufacturer to the distribution warehouses). This usually happensin inter-state and requires the use of bigger sized trucks. Not all local FTL providers offer primary transportation services as to give competitive rates, they need to have branches in the other states where goods come from so that they can take the advantage of return-load tariffs from the original destination to the home-base. In Odisha, only a handful of big transporters offer primary FTL service. Great India Roadways, a Cuttack-origin transporter with 50 years of experience, for example offers first mile and last mile delivery services to and from 6 states and 58 cities throughout the country (including 9 cities in 5 different states). Comparing that to a modern transporter-Om Logistics, just 21 years old, boasts of more than 200+ branches in each and every state of India. It is currently providing both first mile and last mile delivery services across all these cities and states.

PTL providers on the other hand, provide partial load services only. Clients with very specific, low-load needs usually employ the services of PTL providers. This is more commonly used as not every brand or company has enough volume of sales or clients in each corner of the state to afford full truck-load services. Growing firms and smaller firms can get much better logistics costs if the cost of a single truck gets shared among various such other firms. Thus, PTL providers provide goods pooling service to smaller and growing firms, giving them the opportunity to cater smaller markets and also to enter new territories keeping their costs of distribution in control too. Firms prefer PTL compared to sending smaller trucks in FTL as even with enough goods to accommodate let's say a Tata Ace Zip, the economies of scale of PTL is higher, and consequently, smaller firms get cost advantage.

The transport industry in general is extremely competitive. With negligible barriers for entry, almost anyone with just a few lakhs as capital can buy a truck and start offering services to clients directly or through alliance with bigger transporters. Since it is not possible that a bigger transporter can provide delivery service to every corner of the state on the same day given their limited vehicle capacity, they avail services of these smaller transporters for their occasional needs to upkeep their service levels.

Research Methodology and Data:

This is an exploratory research into the modus operandi of various transporters chosen on the basis of convenience sampling. Qualitative analysis using primary data is carried out to arrive at recommendations. The transporters whose offices are close to the city and who were willing to share data required for the study were selected. The upcountry and local rates were obtained after posing as prospective future business clients of the transporters. For this effect, physical meetings were fixed with the sales officers of the transporters. Generally, rates are offered on per kg basis and/or per case/carton basis. To make things calculableuniformly, per kg rates for each destination was obtained. Simple

Average of rates for each of the two categories of transporters is calculated for 21 destinations within the state and for 3 destinations outside Odisha. The rates of traditional transporters are also juxtaposed with those of modern transporters in a chart.

Findings of the Study:

Table 2:

Per KG Rate Ex-Cuttack for Destinations within Odisha

	Traditional Transporters				Modern Transporters				
Location	SITA	Pragati	GIR	Average	OLL	DTCC	Rivigo	Avg.	% Difference
ANGUL	2.00	1.90	1.44	1.78	1.70	6.00	5.00	4.23	138%
BALASORE	2.00	1.90	1.56	1.82	1.70	6.00	6.00	4.57	151%
BARBIL	2.50	2.38	2.28	2.39	2.15	6.00	6.00	4.72	98%
BERHAMPUR	2.00	1.90	1.56	1.82	1.70	6.00	5.00	4.23	133%
BHAWANIPATNA	3.00	2.85	3.24	3.03	2.75	6.00	NA	4.38	44%
BOLANGIR	2.75	2.61	3.00	2.79	2.75	6.00	5.50	4.75	70%
BURLA	2.00	2.18	3.00	2.39	2.50	6.00	6.50	5.00	109%
JEYPORE	3.50	3.82	3.60	3.64	4.00	6.00	6.50	5.50	51%
JHARSUGUDA	2.50	2.73	1.92	2.38	2.00	6.00	6.00	4.67	96%
JUNAGARH	3.50	3.82	3.36	3.56	3.50	6.00	NA	4.75	33%
KEONJHAR	2.00	2.18	1.92	2.03	2.00	6.00	6.00	4.67	130%
KESINGA	3.00	2.85	3.12	2.99	3.25	6.00	7.00	5.42	81%
KORAPUT	3.50	3.33	4.20	3.68	4.50	6.00	8.00	6.17	68%
NAWARANGPUR	3.50	3.33	3.84	3.56	4.00	6.00	NA	5.00	41%
KHARIAR ROAD	4.00	3.80	4.20	4.00	4.50	6.00	7.00	5.83	46%
RAYAGADA	3.00	2.85	3.24	3.03	2.50	6.00	6.50	5.00	65%
ROURKELA TOWN	2.50	2.38	1.92	2.27	2.00	6.00	6.00	4.67	106%
SAMBALPUR	2.00	1.90	1.80	1.90	1.75	6.00	5.00	4.25	124%
SEMILGUDA	4.50	4.28	3.84	4.21	4.00	6.00	NA	5.00	19%
SONEPUR	3.75	3.56	3.36	3.56	3.25	6.00	NA	4.63	30%
TITILAGARH	3.00	2.85	3.36	3.07	2.50	6.00	7.00	5.17	68%

Source: Primary Data

Table 3:

Per KG Rate Ex-Cuttack for Destinations outside Odisha

	Traditional Transporters				Modern Transporters				
Location	SITA	Pragati	GIR	Average	OLL	DTCC	Rivigo	Avg.	% Difference
KOLKATA	NA	NA	5.00	5	4.00	6.00	5.00	5.00	0%
RAIPUR	7.00	NA	6.50	6.75	5.00	7.00	7.00	6.33	-6%
VISHAKHAPATNAM	NA	NA	6.00	6	5.50	6.00	6.00	5.83	-3%

Source: Primary Data

Chart T2 :

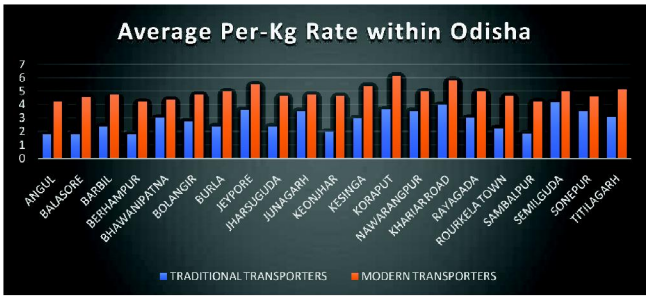


Chart T3 :

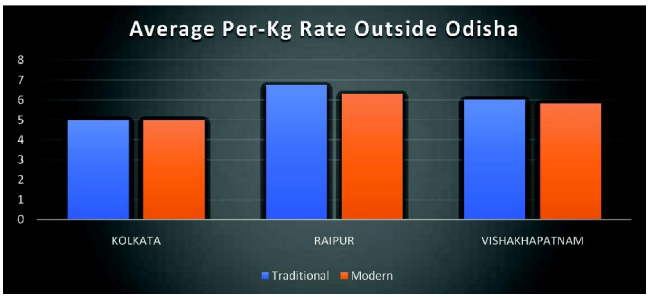


Table 2 contains per-kg rates of 21 destinations within Odisha to whichthe transporters ship on a daily basis. It is important to note that other variablecostsper consignment such as waybill charges, taxes, door delivery charges, etc. have been ignored here as they are almost same across transporters.The average rates for each category, Traditional and Modern have been calculated and difference in percentage of rates of modern transporters compared to traditional ones have been found out. It is clearly visible that at least for deliveries within Odisha, the moderntransportersare nowhere close to rate competitiveness. Modern transporters are 19% to 151% more expensive compared to traditional transporters.

On the other hand, if we look at Table 3, three destinations to which goods are transported most often

from the state are listed. Difference of Per-kg rates as percentage between modern transporters compared to traditional ones have been found out and here, the modern transporters have a clear edge with 3-6% cheaper rates and more serviceability. All modern transporters ship to these destinations, while only 1 traditional transporter does so, solely because of presence of a greater number of branches compared to other local competitors.

The service of modern transporters is not only limited to these 3 destinations. These 3 destinations are picked in this paper as these are the most common destinations to which goods are shipped.All 3 MTs ship to almost every state in the country and have many clients who ship goods from Cuttack to industrial hubs like Lucknow, Daman Diu, Haridwar, Noida, Chennaievenfar-off places like Kerala, J&K, Nagaland, etc. and also vice versa. These modern players are doing both first mile and last mile deliveries from across the country to Odisha and back at very competitive rates.One of the C&F Agents we visited informed us that because of the presence of Om Logistics Limited (OLL) and Gati Logistics (another modern transporter)and the rates at which they work in, their company which has a manufacturing facility in Khordha has terminated C&Fs in 4 neighbouring states and decided to ship all orders to those 4 states from the Cuttack warehouse. This saves lakhs of rupees to the company in terms of fixed costs with a very minuscule penalty in delivery times.

What can the Traditional Transporters Learn?

All consignors receive their LRs on the next day of the date of booking which, surprisingly, has to be collected from the transporter's office. This is pretty cumbersome and utilises manpower unnecessarily. The modern players have fully digitized operations and the moment a booking takes place, an e-LR with all details is sent to the consignor on the same evening. Furthermore, this is entirely trackable online, just like your regular Amazon order, which saves a lot of time in responding to follow-up calls made by the consignees to the consignor. In many business firms and distributionhouses, separate manpower is employed just to collect LRs and follow-up on deliveries. By just digitising their loadsusing simple software, they can facilitate online LR sharing.

Secondly, the modern transporters are vastly departmentalised with multiple functional departments. With a dedicated team for marketing and sales, they often carry out door-to-door visits and offer their services/quotes to logistics managers/owners of business houses in the twin city. They spend big chunks of amounts inviting logistics managers to customer meet-and-greets in luxurious resorts.The human resources that modern transporters employ are also remarkable. For example, the current CEO of one of the MT happens to be the previous head of customer experience at Myntra.The modern transporters recruit ex- entrepreneurs, ex-directors, ex-heads from companies like Bain, DHL, Ola, TruxApp, TCI, Flipkart, etc. to name a few.This is also largely possible because of the fact that most modern transporters are large corporations/start-ups with huge disposable cash pool. One of the MT is financially backed by Matrix, Stellaris, CDC, and Beenext ventures which are 4 of the top VC firms.More often than not, they burn cash to get businesses of smaller firms with smaller loads to increase their clientele and to completely utilise their load capacities.

Another area with a stark differenceistheinfrastructure they work in. During our visit to a traditional transporter's office, we noticed that the accountant was working on a CRT screen computer. The whole office was built right next to a sewage canal and even the director of Odisha's biggest transporter sat in a small, shabby office which left a lot to be wanted in terms of infrastructure. One of the modern transporters on the other hand, had a fully furnished office with a waiting room, cabin for the manager, proper loading docks for vehicles, well placed transit goods in the warehouse space, leased internet connection. Like they say in Hindi, "Jo Dikhta Hai Wo Bikta Hai" or "Success can be achieved through good visibility (in Retail)", our transporters must change with the changing times if they expect logistics heads of big MNCs with offices in DLF Towers to give them business. This might seem insignificant, but subconsciously it surely has an impact on the decision taking authority.

Conclusion:

Transportation remains a crucial part of Odisha's economy at present and will so in future.When companies born and bred in the state are in everyone's focus, we feel that the backbone of such economic development, transporters, should not be ignored. It is important that local transporters buck up and learn from the newer players who have expanded exponentially with technological integration and a newer outlook towards business and try to implement as much as possible within

their own organisations.However, the relationships and trust that the traditional transporters have built over the last few decades will take them a long way when they synergise their existing forte with new advancements in the industry that the modern transporters are very good at implementing.

Growth is the key to survival in the long run and sticking to just secondary transportation won't be enough. While there is definite cost advantage and monopoly in domestic transportation, to get business of primary transportation and upcountry destinations, Odisha's transporters need a good deal of financial backing, government support and assistance in setting up new branches outside Odisha. Most companies are already using modern transporters for all the shipments outside of Odisha which is also a major chunk of transportation business while the local shippers are stuck within Odisha's boundaries. If local players could give competitive rates too, there is a possibility of transforming Odisha into a logistics and transportation hub for eastern and central India in near future.

Author Contributions:

BA conceptualized the study, analyzed, interpreted the data and contributed for preparing final manuscript. JJ compiled the data and drafted the manuscript. Both authors read and approved the final manuscript.

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