
Management in the Transport-Spedition-Logistics Sector (TSL) in a Turbulent Environment

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Abstract:

Purpose: The aim of the article is to analyze the conditions of management of enterprises in Poland operating in the TSL sector (transport, spedition, logistics) in the international dimension in the years 2019 – 2024.

Design/methodology/approach: Companies operating in Poland in the TSL sector on an international scale were selected for the study, on which the impact of the changing environment is one of the highest in the entire economy. The solutions were developed on the basis of the following research methods: analysis of the literature on the subject and existing documents. The time range of the research covers the years 2019 -2024.

Findings: The analysis confirmed that the turbulent environment has a direct impact on the management, functioning and financial results of the company.

Practical implications: The practical value of the article is the SWOT analysis and the determination of trends in the TSL industry.

Originality value: Analysis of the situation of enterprises operating in the TSL sector over the past six years, while indicating the impact of the turbulent environment on their management.

Keywords: Transport, spedition, logistics, management, safety.

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1. Introduction

The dynamic change in the external conditions of the activities of TSL sector (transport, spedition, logistics), starting from the pandemic, through the war in Ukraine, to the economic crisis and rising inflation and cyber threats, force the need for a new look at the management of business operations. The world is accelerating, which consequently causes difficulties with cost control and, as a result, many problems with maintaining the profitability of the operating operations of companies operating in the TSL sector.

The strength of external factors on TSL enterprises is one of the largest in the entire economy. The condition of the TSL industry and the companies operating in it is always a derivative of the situation in industry and trade (Thalassinos *et al.*, 2023). However, predicting the effects of complex processes on the TSL industry, in conditions of serious economic fluctuations, is an extremely difficult issue (Zysińska, 2019; Kadlubek *et al.*, 2022).

The key to growth and planning is always numbers. The numbers don't lie. Without full control of company data, market data, control of changes and trends, this will be a difficult task, if not impossible. Data is the foundation of any company's strategic planning. Long-term planning requires flexibility, openness to changes and at the same time adaptation to the new, unpredictable situation, and there have been many of them in the last 4 years.

The TSL sector in Europe is facing the consequences of an increase in tolls in Germany and a change in policy regarding vehicles powered by liquefied natural gas (Raben, 2023, p. 7) and changes resulting from the introduction of new EU policies.

The TSL sector is moving towards technological progress and increasing automation, it is still dependent on people driving trucks and has been struggling with the problem of a shortage of workers for years. At the same time, companies from the TSL sector face more complex challenges related to the issue of employee potential management due to the high mobility of employees, which limits their knowledge development, proactivity and innovation, as well as transformation towards new technologies (Stoilkovska and Markovi, 2015, p. 145-152). Efficient corporate management increasingly becomes a "tough trade" rather than an intuitive "art" (Skowronek-Mielczarek, Leszczyński, 2007, p. 5).

The World Bank has published the Logistics Performance Index (LPI) since 2007. The Logistics Performance Index used to be based exclusively on perception ratings from a global survey of logistics professionals.

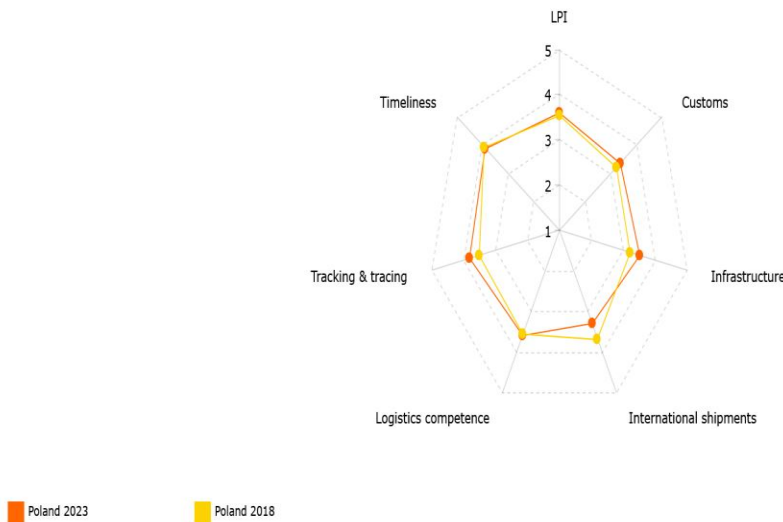
In 2023, it was augmented with key performance indicators derived from massive global international shipment tracking data (data on container shipping, air cargo,

and postal logistics). The new set of indicators measure the speed and connectivity of international supply chains.

The LPI is based on two components: First, a worldwide survey of international logistics operators on the ground (global freight forwarders and express carriers), providing feedback on the logistics “friendliness” of the countries with which they trade. The International LPI 2023 allows for comparisons across 139 countries. The second component of the LPI is based on granular high frequency information on maritime shipping and container tracking, postal and air freight activities that was collected and made available to LPI by several data partners³.

In the last survey, Poland was ranked 26th. Position, which means a move up two positions compared to the 2018 report (Figure 1). It should be noted that among the criteria taken into account in the assessment, the logistics industry achieved the highest index in terms of timeliness and shipment tracking, while the lowest in terms of international shipments and customs clearance.

Figure 1. The International LPI Poland 2023-2018



Source:

<https://lpi.worldbank.org/international/scorecard/radar/C/POL/2023/C+POL+2018>.

The aim of the article is to analyze the conditions for managing a company operating in Poland in the TSL sector (transport, spedition, logistics) in the international dimension in the years 2019-2024.

Companies operating in Poland in the international TSL sector, on which the impact of the changing environment is one of the highest in the entire economy, were

³<https://lpi.worldbank.org/index.php/about>.

selected for the study. The solutions were developed on the basis of the following research methods: analysis of the literature on the subject and existing documents.

The analysis was carried out on the basis of a prestigious list considered by industry specialists to be the most substantive and at the same time objective illustration of the condition of the transport, forwarding and logistics market in Poland. It is created under the substantive supervision of the Warsaw School of Economics, represented by Prof. Halina Brdulak.

The purpose of the ranking is primarily to describe the strengths and weaknesses of the industry, it is also an opportunity to present the company among the largest entities in the country. The ranking includes enterprises that in a given year generated revenue from TSL core activities at the level of at least PLN 2 million and it accounted for no less than 51% of their total revenue. The condition for publishing information about the company is to provide financial data on the company's revenue, send the questionnaire and its scan by the deadline specified annually.

The ranking of TSL companies is developed on the basis of an on-line survey, which is made available annually on the website www.rankingTSL.pl on a specific date. Every year, the winners are selected in six categories: revenues from TSL activities, dynamics of revenues from TSL activities, revenues from: road forwarding, sea/ocean forwarding, road transport, logistics services, respectively. The rankings from 2019 to 2024 were taken into account for the analysis.

In order to achieve the goal, the theoretical aspects of the TSL sector were presented in the first place. Then, based on the analysis of TSL industry rankings from 2019 – 2024, the following were determined: top 5 entities in the industry, threats and future of the industry, and SWOT analysis. The article concludes with the conclusions of the analysis.

2. The Essence of the TSL Sector (Transport, Spedition, Logistics)

The etymological meaning of the concept of logistics, which is a derivative of logic and reason, is treated differently depending on the author and the way he perceives reality. It is not always accompanied by a spatio-temporal reference of primary and secondary processes, which is the key to the correct understanding of the contemporary role and importance of logistics.

Logistics has been present in human life since the dawn of time, which results from the fact that any human activity, both at the individual and group level, is determined by the pursuit of satisfying the needs that are its goal. Business management, which is used to determine how to achieve a goal, is at the heart of the decision-making process. Its basic task is to ensure coordinated action, adequate to the chosen goal and the conditions in which this goal is to be achieved.

Therefore, the effectiveness of the decision-making process is determined by obtaining a specific benefit in the material dimension (Chaberek, 1989, p. 5). Remaining in the economic perspective presented by M. Chaberek, it can be assumed that the essence of logistics is to control the processes of the flow of all resources within the organization, its basic importance can be reduced to the integration of these flows and the optimization of the costs of their implementation (Doński-Lesiuk, 2020, s. 51).

The American Society for Logistics Management has defined logistics as the part of a process in a supply chain responsible for planning, implementing and steering, efficiently, effectively and bidirectionally moving and storing goods, services and information from the point of manufacture to the point of use to meet customer requirements (Baran, Maciejczak, Pietrzak, Rokicki, and Wicki, 2008, p. 8).

The European Logistics Associations defined logistics as a concept including: the organization, planning, control and implementation of the flow of goods from their production and purchase, through production and distribution to the final recipient, the purpose of which is to meet market requirements at minimum costs and minimum capital involvement (Baran, Maciejczak, Pietrzak, Rokicki, Wicki, 2008, p. 9).

It can be considered that logistics is responsible for planning, then implementing and controlling the flow of goods, services and information in order to achieve the goals set for a given organizational unit. B. Słowiński distinguished seven principles of modern logistics: purposefulness, efficiency, comprehensiveness, flexibility, partnership, interdependence, reality (Słowiński, 2008, s. 22).

Table 1. Seven principles of modern logistics

Principle	Characteristics
Expediency	ensuring optimal conditions for the functioning of the company, which will allow to achieve maximum economic effects with the assumed outlays or minimizing outlays in a given production
Efficiency	everything related to logistics activities must be carried out at a level that guarantees the highest economic efficiency
Complexity	comprehensive approach to logistics issues in the sphere of management at all organizational levels, which are to ensure its high effectiveness and assumed economic efficiency
Flexibility	the ability to adapt the logistics system to any changes in the input factors for processes, i.e. changes in legal regulations or variability of demand
Partnership	treating all participants in the logistics chain as equal
Dependency	all the components of logistics function properly only in cooperation with each other
Reality	taking into account rational solutions in the company and logistics chain

Source: Own study based on Słowiński, 2008, p. 22.

The macroeconomic scale of logistical problems includes all issues related to the flow of goods in entire economies. Companies operate on the market by cooperating with each other in the creation of entire logistics chains, connecting manufacturers, supply companies and distributors in a single, comprehensive system, the task of which is to carry out the processes of the flow of goods in order to meet the customer's needs as efficiently as possible. As the economy is globalized and the world becomes a "total village", and the issues related to the flow of goods in such an organism also take on a special meaning.

The construction of more or less complex logistics chains requires the fulfillment of certain conditions, primarily in terms of indicating the possible integration of activities within extensive logistics chains (Nowakowska-Grunt, 2008, p. 545).

It should also be remembered that the modern economic system – both on a global and regional scale – is based on international supply chains and cross-border logistics networks, which determine trade, consumption and economic growth. As a consequence of violating the integrity of existing chains (e.g. their disruption or suspension of supplies), the consequences can be costly and far-reaching (Doński-Lesiuk, 2022, s. 46).

In economic life, the term TSL (Transport, Spedition, Logistics) is practiced, which deals with comprehensive transport services, from planning the entire process, preparation for it, sending the shipment, to the process itself and its positive completion. Each of these components of TSL (Figure 2) is equally important, shortcomings in any of them lead to a disturbance in the balance and efficiency of the entire transport process of a given commodity.

TSL is an industry that is still developing, its development follows the economic development, because the demand for comprehensive transport services is still growing rapidly and there is no indication that this will change⁴.

Chmielewski believes that the TSL sector is of a service nature and includes all business activities directly related to the spatial movement of goods and people. Its complementarity with other sectors of the economy (with particular emphasis on domestic and foreign trade) is also an important feature (Chmielewski, 2012, p. 328).

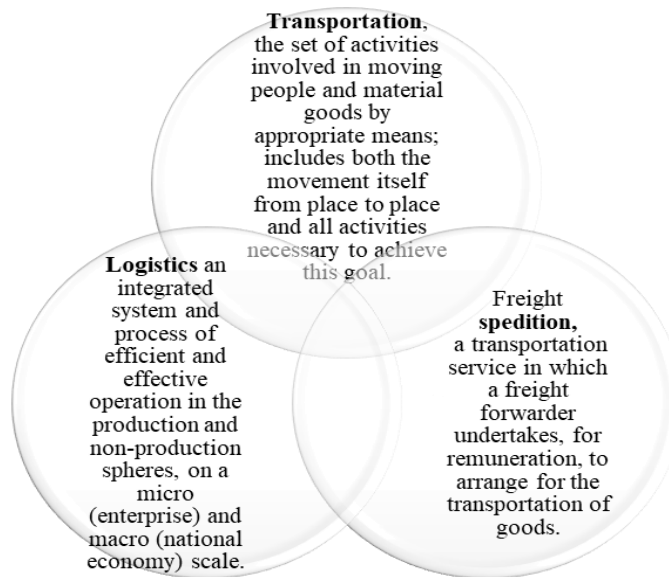
In turn, C. Mańkowski defines TSL as "economic activity consisting in offering and providing on the market, i.e. in relation to other entities, services: movement of people and material goods (transport), organization of cargo transport (forwarding) and comprehensive management and implementation of all flow processes, including transport, forwarding, storage (logistics)" (Mańkowski, 2010, pp. 38-41).

⁴<https://blogtransportspedycja.wordpress.com/2016/03/29/czym-jest-tsl/>

According to H. Brdulak, "it is very difficult to separate the different areas of activity in the field of TSL that enterprises represent. The boundary between transport, forwarding and logistics is fluid and not fully defined" (Brdulak, 2015, p. D8).

In economic terms, the role of transport and logistics in the economy is inextricably linked with a specific complementary system of the transport system and the economy.

Figure 2. The essence of the TSL industry



Source: Own study.

It is not possible to introduce substitute solutions, because running any business activity is not possible without the involvement of transport. Direct dependencies between the quantities transport and business cycles in the economy, as well as between transport investment and economic development, prove the relationship between macroeconomics and transport (Doński-Lesiuk, 2022, s. 23).

The TSL industry, thanks to advanced processes of managing the entire supply chain, with various analyses, is perceived as promising and at the same time creating new opportunities to compete (Antczak, 2020, p. 79).

3. Analysis of the TSL Sector Operating in a Changing Environment

Organizations operate in a broadly understood complex and dynamic environment and are so dependent on it that the implementation of the strategy quickly becomes a test of the efficiency of the organization's functioning. The term "environment" was deliberately used at the beginning instead of the popular term "environment" to

emphasize that it is necessary to go beyond the previous understanding of the environment as only the market and industry.

The environment is a complex system of many trends, events, and markets that create the context of the company's operations (Oblój, 2007). Environmental variability is the speed and amount of changes in the environment. The more frequent and more of the changes there are, the more turbulent the environment is. A turbulent environment is characterized by the need for flexibility and adaptation to rapid social or technical changes⁵.

The volatile and uncertain market environment mobilizes the management to look for safe areas of operation and develop the ability to quickly detect threats, trying to adapt to these difficult conditions, creating open and flexible strategies that allow them to quickly face market challenges and opportunities.

The TSL industry in Poland is developing dynamically, despite the challenges resulting from global economic changes. The largest players in the industry are constantly investing in technology and diversifying their operations, while new entrants are rapidly gaining positions in the rankings.

In the 29th edition of the TSL ranking, the first place and the highest revenues were achieved by Raben Group, and this is the third consecutive victory of this company. The second place was taken by GK DPD Polska, and the podium was closed by DSV. In the category of revenue growth from TSL operations, A&S CARGO is the leader. The second position went to LPP Logistics, and the third to BFI.

The winner in terms of revenues in the area of road freight forwarding was ROHLIG SUUS Logistics, which was in second place in 2023. The second place was taken by Optima Logistics Group, and the third by Hellmann Worldwide Logistics Polska. The first place in the sea/ocean freight category was taken by Ligentia Poland.

The second place went to DHL Global Forwarding, and the third to Tirsped. In road transport, Fresh Logistics Polska turned out to be the leader. SKAT Transport, which improved its result by one notch compared to last year, and LINK also took the podium in this category.

In the last category, which is logistics services, the main prize went to Raben Group for the second time in a row. The DSV Group, on the other hand, turned out to be the runner-up, just like last year. There was no surprise, as it turned out with the third place, which, like last year, was taken by Schenker (29. Ranking firm TSL).

Based on the analysis of the rankings of TSL companies (Transport, Forwarding, Logistics) from 2019-2024, the top 5 companies in this industry that regularly

⁵ https://mfiles.pl/pl/index.php/Otoczenie_organizacji.

occupy leading positions in various categories (revenues, growth dynamics, road freight forwarding, sea freight forwarding, logistics services) were determined to:

1. **Raben Group** – for several years it has been at the top of the TSL rankings, both in terms of revenues and logistics services.

Raben Group offers comprehensive logistics services in the field of domestic and international transport, contract logistics, air and sea transport, full truck load, intermodal transport and logistics of fresh products. It has branches in 15 European countries⁶.

2. **DSV Group** – regularly occupies high positions in various categories, m.in. road transport, logistics services and freight forwarding.

The key areas of DSV Group's operations in Poland overlap with the corporate organization. They are divided into three divisions: DSV Road (Freight Forwarding and Road Transport), DSV Air & Sea (Air and Sea Freight Forwarding) and DSV Solutions (Warehouse Logistics). The Group offers direct road, air and sea connections and warehousing services on 6 continents as part of a complete supply chain⁷.

3. **DB Schenker** – is often on the podium in the categories of logistics services and forwarding, both road and sea.

DB Schenker is a transnational corporation providing integrated logistics services. It serves industry and trade, offering comprehensive solutions using land, air, ocean transport, contract logistics. Manages global supply chains⁸.

4. **PEKAES Group** – often is awarded in the categories of road freight forwarding and logistics.

The PEKAES Group offers comprehensive warehousing services, international and domestic groupage distribution, FTL, domestic and international forwarding, sea, air, rail, as well as bulk logistics and intermodal services. The Group has one of the most efficient infrastructures of domestic distribution terminals, rail container and transshipment terminals in Poland and partnerships with organizations in all major European countries⁹.

5. **Hegemann Transporte** – regularly ranks among the leading road freight forwarding companies.

⁶<https://polska.raben-group.com/>.

⁷<https://www.dsv.com/>.

⁸<https://www.dbschenker.com/>.

⁹<https://geodis.com/>.

Hegelmann Transporte is a global logistics company providing services in a wide variety of sectors and industries. It offers multimodal and globally available solutions for transportation, logistics, warehousing, hospitality, and other services¹⁰.

a. Difficulties in the TSL sector

The TSL sector is facing many challenges that result from rising operating costs, staffing difficulties, regulatory changes and the unstable geopolitical situation. Businesses need to invest in technology, operational optimization, and sustainability to address these risks. Based on the analysis of TSL company rankings from 2019-2024, it is possible to determine the main areas of difficulty faced by the industry (Figure 3).

Figure 3. Areas of difficulty in the TSL sector



Source: Own elaboration based on TSL sector rankings from 2019-2024.

The TSL industry is struggling with difficulties in settling liabilities, which was evident both before and during the pandemic. An example is payment gridlocks, which significantly affect the financial condition of enterprises. An increase in debt and delays in payments can lead to problems with current operations.

A significant threat to companies in the TSL industry is the rising cost of labour and changes in legal regulations, such as the need to implement smart tachographs or

¹⁰<https://www.hegelmann.com/pl/>.

more restrictive rules for declaring goods (SENT Act¹¹). In addition, inflation and rising freight prices had a negative impact on the functioning of enterprises.

The TSL industry suffers from a shortage of qualified employees, which has been highlighted in many reports. This problem results both from the difficulties in attracting young staff and from the increase in labour costs. This reduces the efficiency of enterprises and forces them to invest in process automation.

Geopolitical crises, such as the war in Ukraine, the situation on the border with Belarus or Brexit, have a significant impact on the activities of companies in the TSL industry. These conflicts disrupt supply chains, change markets, and introduce new regulations that make it difficult to operate.

Changes in regulations, especially related to ESG, are becoming an increasingly important challenge for the TSL industry. Companies have to adapt to new sustainability requirements, which entails additional costs and investments in environmentally friendly technologies.

While digitalization brings many benefits, such as automation and better management of operations, it is also a challenge for many businesses, especially those that cannot keep up with the rapid development of technology. This requires large financial outlays and appropriate infrastructure.

b. The future of the TSL sector

The future of the TSL sector is shaped by many factors that have affected the market in recent years. Based on the analysis of TSL company rankings from 2019-2024, several key trends can be distinguished (Figure 4).

The TSL sector is increasingly focusing on process automation and digitization. An example is the introduction of real-time shipment tracking systems, such as ETA (Estimated Time of Arrival), which allows for precise monitoring of deliveries. These solutions are becoming crucial in increasing operational efficiency and improving the quality of services.

The rankings show that companies are increasingly investing in sustainable development, which brings measurable financial results. The increase in profitability of companies that have opted for sustainable operations indicates that ecology is becoming a key factor in development. Intermodal transport is gaining importance because it is more environmentally friendly, generating fewer emissions and noise.

The war in Ukraine and other geopolitical factors, such as trade blockades or customs wars, have a huge impact on the functioning of TSL companies, which have

¹¹*Act of 9 March 2017 on the Monitoring System for the Road and Rail Carriage of Goods and Trade in Heating Fuels, Dz.U. 2017, item 708.*

to adapt their supply chains. It requires flexibility and quick response. The reconfiguration and optimisation of supply chains within cross-border logistics networks is a challenge that creates the need to achieve adaptability of the solutions used in accordance with the requirements generated by events and situations accompanying the activities of companies (Doński-Lesiuk, 2022, s. 46).

Figure 4. Trends in the TSL sector



Source: Own elaboration based on TSL sector rankings from 2019-2024.

The development of e-commerce has significantly increased the demand for logistics and warehousing services. Companies that have adapted to this trend have recorded revenue increases, especially those focused on warehouse operations and e-commerce-related logistics.

The TSL sector is struggling with a shortage of skilled workers, which is one of the main challenges for the future of the sector. Companies are trying to remedy this by investing in automation and technological innovation.

Despite the challenges, the TSL sector is achieving record financial results. Revenue growth in 2022 of more than 23% and net profit growth of 27% show that the industry is still capable of generating strong profits. However, these increases are mainly driven by inflation and rising freight costs, which poses challenges for businesses to maintain long-term financial stability.

Despite the strong financial results, the future of the industry is difficult to predict. The TSL sector in Poland and around the world is facing challenges related to inflation, geopolitics and a rapidly changing market.

c. SWOT analysis of the TSL sector

The SWOT analysis of the TSL sector (Table 2) shows that the TSL industry in Poland is dynamic and innovative, but at the same time it struggles with numerous challenges, both internal (costs, lack of employees) and external (regulatory changes, economic uncertainty). In the area of strengths, it can be noted that in 2022-2023, many companies in the TSL sector (m.in.: Raben Group and DSV) recorded record revenues and profitability increases, despite difficult market conditions such as the pandemic and the war in Ukraine.

Poland is the leader in road transport in the European Union, which strengthens the position of domestic companies on international markets.

Table 2. SWOT analysis of the TSL sector

<p>Strengths:</p> <ul style="list-style-type: none"> ▪ record revenues and increased profitability ▪ leader in road transport in the EU ▪ investments in innovation and technology ▪ diversification of activities ▪ dynamic development of e-commerce ▪ investments in infrastructure 	<p>Weaknesses:</p> <ul style="list-style-type: none"> ▪ liquidity problems and payment gridlocks ▪ high labour and fuel costs ▪ lack of employees ▪ uneven development in the segments:
<p>Chances:</p> <ul style="list-style-type: none"> ▪ development of intermodal transport ▪ increasing demand for logistics and warehousing services ▪ investments in automation and digitalization expansion into new markets 	<p>Threats:</p> <ul style="list-style-type: none"> ▪ increase in legal regulations ▪ economic and geopolitical uncertainty ▪ competition from foreign companies ▪ changes in global supply chains

Source: Own elaboration based on TSL sector rankings from 2019-2024.

The industry is increasingly focusing on digitization and automation of logistics processes. Tools such as real-time tracking of shipments (e.g., the introduction of ETAs by Raben Group) are becoming a standard, which increases operational efficiency and builds customer trust.

Companies diversify their services by offering intermodal solutions, air, sea and rail freight forwarding, which allows for greater stability, resilience to market changes, and compliance with requirements related to sustainable development.

Intermodal transport is greener. Companies continue to grow by investing in new logistics infrastructure, opening new locations and upgrading existing facilities, allowing for better customer service and more efficient management of the flow of goods. The growth of e-commerce supports the development of the logistics sector, especially in the context of warehousing services and transport of goods.

In terms of weaknesses, payment gridlocks can be mentioned, which can lead to liquidity problems, which occur, especially smaller entities. The industry is confronted with rising operating costs, m.in. labour, fuel and energy costs, as well as changes in laws in different countries, making it difficult to do business across borders. Companies need to adapt their strategies to minimize the impact of these factors on profitability.)

Problems with access to qualified workers are a serious challenge, especially in the context of competition with other sectors and the growing need to hire qualified staff.

The pandemic has exacerbated this problem, and entrepreneurs need to change their business models to cope with the difficulties of a shortage of skilled labour. Road transport, although dominant, recorded declines in revenues, which shows that not all segments are developing evenly.

An opportunity for the TSL sector may be the increase in environmental awareness and the development of intermodal transport infrastructure open up new opportunities for companies that want to offer sustainable transport services. The growth of e-commerce and changes in global supply chains are creating new opportunities for logistics operators.

Technological advances in warehouse automation and shipment tracking tools such as ETA (estimated delivery time) give businesses a competitive advantage. The rise of eastern markets such as Kazakhstan and further global expansion can help companies grow.

The TSL sector may be threatened by new regulations being introduced, such as mandatory smart tachographs, changes in EU labour law and growing pressure to implement ESG standards, which may lead to an increase in operating costs. Factors such as the war in Ukraine, inflation and the economic crisis may negatively affect the stability of the sector.

Polish companies compete on the European market with large international corporations, which may affect margins and market position. Uncertainty related to global supply chains, e.g. due to pandemics or logistical blockages (such as the Suez Canal), may affect the operational stability of companies.

With regard to the adaptability of modern supply chains, it is worth noting the determinants of development and changes not only in the chains themselves, but also in logistics and – thus – the TSL sector in general, which include (Doński-Lesiuk, 2022, s. 50-51) m.in. focusing logistics activities on customer expectations, including new values and utilities; new concepts and strategies for the functioning of chains generated by increasing time and cost pressure; building strategic alliances while intensifying competition also in the chain itself.

4. Conclusion

Based on the analysis of the TSL (Transport, Forwarding, Logistics) sector rankings from 2019-2024, the following conclusions can be drawn:

1. The dominance of large players such as Raben Group, which consistently ranks first in most categories, especially in revenues from TSL and logistics services, or DSV and DB Schenker, which also regularly appear at the top of the ranking, which indicates their stable position in the industry.
2. Most TSL companies have seen significant revenue growth, even during difficult periods such as the COVID-19 pandemic. In 2021, company revenues increased by an average of 34%, and in 2022 by 23%. Despite this growth, entrepreneurs are cautious about the future, due to rising operating costs and economic uncertainty, including the war in Ukraine.
3. Leaders in the category of revenue dynamics often change. In recent years, companies such as A&S Cargo, Express Heroes and Ray Trans have appeared. Companies such as TIRSPED and Autolegion are also seeing strong increases in revenue growth, suggesting that new entrants could be growing their business in the industry.
4. The TSL industry faces a number of challenges, including rising operating costs, staff shortages and sustainability requirements, as well as liquidity issues, especially in the face of payment backlogs and increased regulatory requirements, continue to pose significant challenges.
5. ESG (Environmental, Social, and Governance) is playing an increasingly important role. Companies that focus on sustainability are seeing better financial performance and profits, indicating a growing awareness of sustainability.
6. The TSL industry is investing heavily in technological innovations, including automation and digitalization, to meet new market demands and improve operational efficiency.

7. There is segmentation by type of activity. In road freight forwarding, companies such as Hegelmann Transporte and ROHLIG SUUS Logistics are the leaders. In sea freight forwarding, ATC CARGO and TIRSPED stand out, while in warehousing services, DHL EXEL SUPPLY CHAIN dominates.

The future of the TSL industry is shaped by the dynamically changing market environment, in which technology, ecology, e-commerce and – even more so than a few years ago – the ability of enterprises to respond flexibly to global crises play a key role.

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