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Improving the Use of Marketing Strategies in the Third-Party Logistics (3pl) Services Market: An Analysis Based on National-Level Data

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Abstract: Based on official data of the National Statistics Committee, the article analyzes the dynamics of the transport and logistics services market of the Republic of Uzbekistan in 2020–2025 and substantiates directions for improving the use of marketing strategies by third-party logistics (3PL) providers. The compound annual growth rate of transport services reached 26.3 %, while the volume of freight carried in 2025 grew by only 5.2 %, indicating emerging demand for value-added logistics services. An increase in regional market concentration was identified (the Herfindahl–Hirschman index rose from 1095 to 1474). A five-stage "3PL-STRAT" marketing strategy model and a segment–strategy matrix for 3PL providers are proposed.

Keywords: 3PL, logistics services, marketing strategy, outsourcing, value proposition, market concentration, relationship marketing, Uzbekistan.

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1. Introduction

The increasing complexity of global supply chains, the rapid growth of e-commerce, and the diversification of international trade routes are encouraging companies to outsource their logistics functions to specialized external providers. Third-party logistics (3PL) refers to the activities of organizations that, under contractual agreements, provide an integrated range of logistics operations between cargo owners (shippers) and carriers, including transportation, warehousing, cargo handling, customs clearance, and inventory management. Under these conditions, logistics services are evolving from a simple operation of "delivering goods from point A to point B" into a value proposition that enhances customer competitiveness, thereby requiring providers to develop advanced marketing competencies.

This issue is of particular importance for the Republic of Uzbekistan. The country's landlocked geographical position increases the share of transportation costs in foreign trade, making logistics efficiency a crucial factor in national competitiveness. Resolution No. PQ-28 of the President of the Republic of Uzbekistan, dated January 27, 2025, approved the Concept for the Development of the Transport and Logistics System through 2030. The resolution establishes targets to at least double international freight transportation volumes and exports of transport and logistics services, increase the share of containerized freight transportation by 1.5 times, and improve Uzbekistan's position in the World Bank's Logistics Performance Index (LPI) to a rank no lower than 55th [1]. The next stage of state policy envisages a transition from conventional freight transportation and storage toward 3PL and fourth-party logistics (4PL) services, supply chain management, dry ports, and digital transit solutions [2].

However, in practice, most domestic logistics companies still primarily offer narrowly specialized transportation services at the 1PL–2PL levels, while their marketing activities remain largely limited to price competition and personal business relationships. According to official presentation materials, the share of the shadow economy in the freight transportation sector exceeds 42% [3]. This situation hinders the development of the 3PL model, which requires transparent contractual relationships, service-level guarantees (SLAs), and brand-based competition. Therefore, the systematic application of marketing strategies to develop 3PL services represents a pressing scientific and practical challenge.

The aim of the study is to develop scientifically grounded proposals and recommendations for improving the use of marketing strategies in the development of 3PL logistics services in Uzbekistan, based on an analysis of official national statistical data. To achieve this aim, the following objectives were established: to synthesize scientific approaches to marketing 3PL services; to assess the market dynamics and regional structure of transport and logistics services during 2020–2025; to calculate market concentration indicators; and to develop a segment-oriented marketing strategy model for 3PL providers.

The scientific interpretation of the concept of third-party logistics (3PL) emerged in the 1990s. G. Berglund and co-authors classified 3PL providers into carrier-based, warehouse-based, and information-based groups, demonstrating that the future development of the market depends on providers' ability to offer value-added services [4]. K. Selviaridis and M. Spring systematized the literature on 3PL and noted that most studies had focused on the perspectives of customers making outsourcing decisions, while provider strategies and marketing had received insufficient attention. A. Marasco likewise emphasized the increasingly collaborative nature of 3PL relationships and the growing prevalence of long-term contracts [5].

From the perspective of provider strategy, the study by S. Hertz and M. Alfredsson is particularly significant. They classified 3PL companies into four types according to their problem-solving capabilities and degree of customer adaptation: standard providers, service developers, customer adapters, and customer developers [6]. This typology substantiates the need to move beyond the "one-size-fits-all" approach in 3PL marketing toward value propositions tailored to specific market segments. Through long-term observations of large manufacturers' use of 3PL services, R. Lieb and B. Bentz demonstrated that, alongside cost reduction, service quality and information technology capabilities have become increasingly important criteria in customers' selection of logistics providers [7].

Within marketing theory, 3PL services are considered an object of business-to-business (B2B) services marketing. The service-dominant logic proposed by R. Lusch and S. Vargo establishes that value is co-created by providers and customers. This concept is reflected in 3PL contracts through practices such as jointly defining service levels, establishing key performance indicators (KPIs), and implementing open-book accounting. K. Grönroos identifies relationship marketing as a key strategic direction for service companies, while the SERVQUAL model developed by A. Parasuraman and co-authors is widely used in logistics research as a methodological framework for assessing service quality. M. Christopher interprets customer service levels in logistics as a source of competitive advantage [8].

Although research has been conducted in Uzbekistan on the digitalization of the transport and logistics system, transit potential, and infrastructure development, the marketing strategies of 3PL providers—particularly customer segmentation, value propositions, and regional differentiation—have not been sufficiently investigated as distinct research subjects. Researchers from Belarus have also noted that Uzbekistan's transport and logistics market is developing rapidly, while emphasizing the need to

improve the quality of 3PL services, standardize logistics operations, and clearly define the responsibilities of national freight forwarders [9]. This research gap determines the focus of the present study.

2. Methodology

The information base of the study consists of official open-access data published by the National Statistics Committee of the Republic of Uzbekistan. These include the indicator “Volume of Transport Services (Annual)” (identification code 1.05.01.0023, billion UZS, with preliminary data for 2025) and the indicator “Total Volume of Freight Transported” (million tonnes). Additionally, official and analytical sources covering foreign trade, service exports, transit, and logistics centers were used.

The analysis was conducted using the following methods: (1) **time-series analysis**, including the chain growth rate and compound annual growth rate (CAGR), calculated as $CAGR = (Y_{2025} / Y_{2020})^{(1/5)} - 1$; (2) **structural analysis**, examining the share of each region in the national total; (3) **market concentration assessment**, using the Herfindahl–Hirschman Index ($HHI = \sum s_i^2$, where s_i represents the percentage share of region i , and the combined share of the three largest regions (CR3); (4) **value-to-tonnage ratio analysis**, comparing the growth rates of the value of transport services and the volume of freight transported; and (5) **content analysis and strategic modeling**, used to develop a marketing strategy model based on regulatory documents and scientific literature. All calculations were performed by the author using official data.

As a methodological limitation, it should be noted that national statistics do not record 3PL services as a separate indicator. Therefore, the “volume of transport services” indicator was used as a proxy for the potential size of the 3PL market, reflecting overall demand for logistics services. All monetary indicators are expressed at current prices.

3. Results

According to official data, the volume of transport services in Uzbekistan increased from UZS 58.6 trillion in 2020 to UZS 188.3 trillion in 2025, representing a 3.2-fold increase (Table 1). Throughout the period, the annual growth rate remained relatively stable, ranging from 23% to 28%, while the compound annual growth rate (CAGR) reached 26.3%. Considering that consumer inflation in 2025 stood at 7.3% [16], the sector also demonstrated substantial real growth [10].

Table 1. Dynamics of the volume of transport services in the Republic of Uzbekistan, 2020–2025

Indicator	2020	2021	2022	2023	2024	2025*
Volume of transport services, UZS trillion	58.6	74.7	92.3	118.3	151.8	188.3
Year-on-year growth, %	–	27.4	23.5	28.2	28.4	24.0
Relative to 2020, times	1.00	1.27	1.57	2.02	2.59	3.21
Share of Tashkent city in the national volume, %	15.2	14.9	17.1	17.9	20.4	23.2

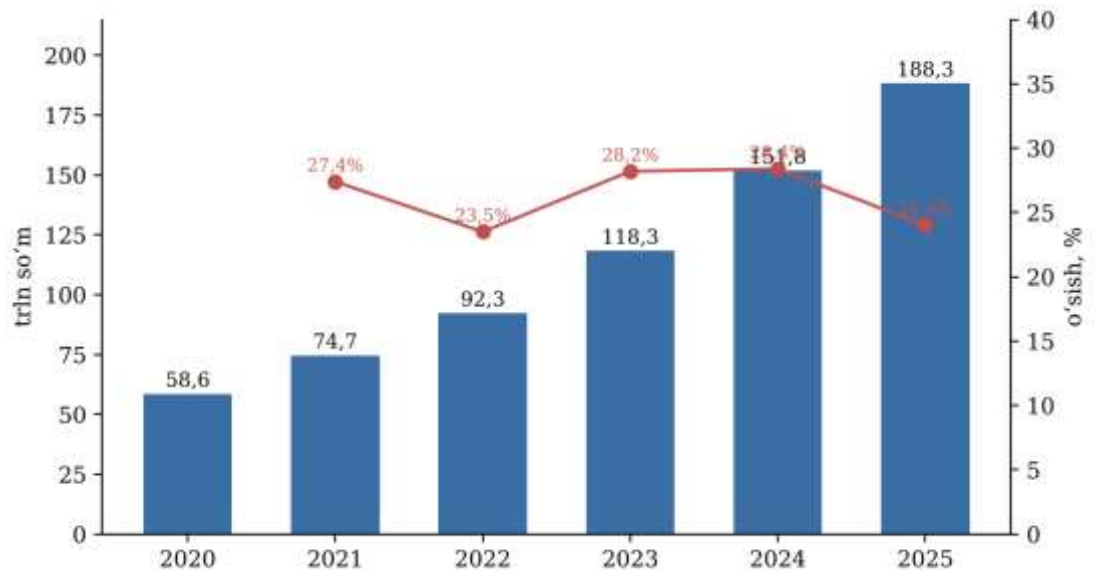


Figure 1. Volume of transport services (UZS trillion) and its annual growth rate (%)

Source: compiled by the author.

One of the key findings of the study is the discrepancy between the dynamics of the value of transport services and the physical volume of freight transported. In 2025, the total volume of freight transported in Uzbekistan reached 1,601.0 million tonnes, representing an increase of only 5.2% compared with 1,521.2 million tonnes in 2024. Over the same period, the value of transport services increased by 24.0%. Even after excluding price-related factors, such as inflation and tariff increases, the value of services per tonne of freight appears to have risen [11]. On the one hand, this reflects an increase in the share of international and long-distance transportation; on the other hand, it indicates growing customer demand for additional services, including freight forwarding, warehousing, consolidation, and customs clearance. This trend provides the economic rationale for the 3PL model: providers' revenues increasingly begin to depend not merely on freight tonnage but also on the breadth of services offered to each customer [12].

An analysis of the regional structure reveals an uneven distribution of the market (Table 2). A portion of the national total, amounting to UZS 51.2 trillion in 2025, consists of transport services at the national level that are not allocated across individual regions. Therefore, regional shares were calculated relative to the volume distributed among the regions. In 2025, Tashkent City accounted for 31.8% of this regional total (23.2% of the national total), followed by Samarkand Region (10.6%) and Tashkent Region (9.9%). Growth rates also varied considerably across regions: the CAGR in Tashkent City reached 37.4%, whereas in Syrdarya, Navoi, and Surkhandarya regions, it remained within the range of 19–22%.

Table 2. Regional structure and growth rates of the volume of transport services

Region	2020, UZS billion	2025*, UZS billion	Share in 2025, %	CAGR 2020–2025, %
Tashkent city	8,921.0	43,651.1	31.8	37.4
Samarkand region	3,989.4	14,558.4	10.6	29.6
Tashkent region	4,505.4	13,636.4	9.9	24.8
Fergana region	3,115.0	10,982.6	8.0	28.7
Andijan region	2,743.5	8,589.6	6.3	25.6
Kashkadarya region	2,490.5	7,922.2	5.8	26.0

Region	2020, UZS billion	2025*, UZS billion	Share in 2025, %	CAGR 2020– 2025, %
Bukhara region	2,637.0	7,661.6	5.6	23.8
Namangan region	1,942.7	6,637.7	4.8	27.9
Khorezm region	1,855.9	6,319.9	4.6	27.8
Republic of Karakalpakstan	1,821.7	5,110.9	3.7	22.9
Surkhandarya region	1,459.2	4,006.9	2.9	22.4
Navoi region	1,468.9	3,914.0	2.9	21.7
Jizzakh region	936.7	2,619.9	1.9	22.8
Syrdarya region	610.1	1,483.4	1.1	19.4

Regional concentration indicators confirm that this uneven distribution is becoming more pronounced (Table 3). The Herfindahl–Hirschman Index (HHI) increased from 1,095 points in 2020 to 1,474 points in 2025, while the CR3 indicator rose from 45.2% to 52.4%. In other words, logistics activities and the revenues associated with them are becoming increasingly concentrated in the capital and major economic centers in its vicinity [13]. This situation presents 3PL providers with two distinct marketing challenges: in major centers, they must establish a competitive advantage through differentiation and branding amid intense competition; in other regions, they must stimulate underdeveloped demand and educate potential customers about the benefits of outsourcing through demand-development marketing.

Table 3. Indicators of regional concentration of the transport services market

Indicator	2020	2025*	Change
Herfindahl–Hirschman Index (HHI), points	1,095	1,474	+379
CR3 (share of the three largest regions), %	45.2	52.4	+7.2 p.p.
Share of Tashkent city, %	23.2	31.8	+8.6 p.p.
Ratio of the volumes of the largest and the smallest region, times	14.6	29.4	+14.8

External economic factors are also contributing to the growing demand for 3PL services. In 2025, Uzbekistan's foreign trade turnover reached USD 81.2 billion, representing a 20.7% increase compared with 2024. Exports amounted to USD 33.8 billion, while imports totaled USD 47.4 billion. Service exports reached USD 9.76 billion, of which 33% was attributable to transport services. The volume of transit freight transported through the country reached 15.3 million tonnes in 2025, marking a 54% increase compared with 2021. At the same time, although the total capacity of 27 logistics centers meeting international standards amounted to 27.2 million tonnes, only one of these centers belonged to the highest category [14]. This indicates the existence of infrastructure constraints on the development of 3PL services, particularly warehousing and other value-added operations.

The digitalization of the market is also transforming marketing channels. According to the freight exchange ATI.SU, during the first half of 2025, the number of orders for domestic freight transportation in Uzbekistan increased by 78%, while orders for export transportation grew by two-thirds. Prices for domestic logistics services rose by 37%, and market participants increasingly shifted from messaging applications to specialized digital platforms. These developments indicate that digital channels are becoming a key means of customer acquisition for 3PL providers [15].

Based on the findings, a five-stage marketing strategy model, designated “**3PL-STRAT**,” is proposed for 3PL providers. The model consists of the following stages: **S – Segmentation** (grouping customers according to industry, cargo characteristics, and logistics complexity); **T – Targeting and Value Proposition** (developing a tailored portfolio of 3PL services for each segment); **R – Relationship Marketing** (establishing long-term partnerships based on contracts, service-level agreements (SLAs), and key performance indicators (KPIs)); **A – Digital Channels and Automation** (implementing online ordering, freight tracking, and integration with digital platforms); and **T – Trust and Brand** (building brand equity through transparency, certification, and compliance with international standards). The practical application of the model is presented in the segment–strategy matrix (Table 4).

Table 4. “Segment–strategy” matrix for 3PL providers (author’s development)

Customer segment	Main need	3PL service bundle	Marketing strategy	Main KPI
Fruit, vegetable, and food exporters	Speed, temperature control, certificates	Cold chain, consolidation, phytosanitary and customs clearance	Industry specialization, seasonal contracts, partnership with export clusters	Delivery time, product loss, %
Manufacturing enterprises	Supply continuity, cost reduction	Inbound logistics, warehousing, inventory management, JIT delivery	Relationship marketing, “open-book” pricing, long-term SLAs	OTIF, inventory turnover
E-commerce and retail	Fast delivery, returns	Fulfillment, last mile, reverse logistics, API integration	Digital marketing, platform integration, tariff packages	Order fulfillment time, return rate
International trade and transit	Reliability, multimodal solutions	Freight forwarding, multimodal transportation, dry port services	Corridor-based branding, international alliances, exhibitions	Transit time, share of error-free documents
Small and medium-sized businesses	Inexpensive and simple service	Less-than-truckload (LTL) shipping, standard packages, warehouse rental	Standardized offers, online calculator, loyalty program	Customer acquisition cost, repeat orders

4. Discussion

The research findings indicate that Uzbekistan’s logistics market is transitioning from a phase of quantitative growth to one of qualitative transformation. The fact that the value of services is growing faster than freight tonnage is consistent with a pattern identified in international studies: as markets mature, customers increasingly prioritize criteria beyond price, including service quality, information technology, and flexibility [16]. In this regard, competition based solely on tariffs is unlikely to be effective for domestic providers in the long term. Instead, transitioning toward the “customer adapter” and “customer developer” provider types identified in the Hertz and Alfredsson typology should become a key direction of marketing strategy [17].

The increasing regional concentration of the market also indicates that a single national marketing strategy is insufficient [18]. While 3PL providers in the capital need to differentiate themselves through specialization and branding amid intense competition, regional markets—particularly Samarkand, Fergana, and Namangan regions, which have demonstrated high growth rates—would benefit more from “demand-development”

marketing strategies. These may include establishing regional branches, partnering with local exporters, and promoting the advantages of logistics outsourcing. The high share of the shadow economy also creates an opportunity to turn transparent contracts, electronic document management, and service-level agreements (SLAs) into competitive advantages for 3PL brands. Formal, insured, and traceable logistics services offer clear value to large and export-oriented customers [19].

The study also has several limitations. First, because 3PL services are not recorded separately in national statistics, the analysis relies on aggregate transport service indicators. Second, the data are expressed at current prices, and the figures for 2025 are preliminary. Future research should empirically assess the structure of demand for 3PL services and the criteria used to select providers through surveys of enterprises [20].

5. Conclusion

Between 2020 and 2025, the volume of transport services increased 3.2-fold, with a compound annual growth rate (CAGR) of 26.3%, while the volume of freight transported grew by 5.2% in 2025. The faster growth in service value relative to freight tonnage indicates emerging demand for value-added logistics services and suggests that market conditions are becoming increasingly conducive to the adoption of the 3PL model.

Regional market concentration has intensified, with the Herfindahl–Hirschman Index (HHI) increasing from 1,095 to 1,474 and the combined market share of the three largest regions (CR3) rising from 45.2% to 52.4%. Accordingly, 3PL providers are advised to differentiate their marketing strategies by region: adopting differentiation and branding strategies in the capital while implementing demand-development strategies in other regions.

The proposed **3PL-STRAT model**—comprising segmentation, value proposition, relationship marketing, digital channels, and trust and branding—together with the segment–strategy matrix, provides a framework for enabling providers to shift from tariff-based competition toward competition based on value propositions.

It is recommended that the National Statistics Committee introduce separate reporting of logistics services by 1PL–4PL levels, while the Ministry of Transport establish a system for ranking 3PL providers according to service quality indicators, including service-level agreements (SLAs) and on-time, in-full delivery (OTIF). These measures would improve market transparency and establish a reliable information base for 3PL marketing.

Furthermore, upgrading the quality classification of logistics centers, partially subsidizing the costs of international certification (ISO 9001, ISO 28000, and TAPA), and introducing professional development programs in marketing and customer relationship management for logistics companies would contribute to strengthening the export potential of 3PL services.

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