

LOGISTICS FOR BUSINESS KARELIA-OULU REGION

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State of E-commerce logistics: Focus on Finland and Russia

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1. INTRODUCTION

I have been working as an assistant researcher in LOGOKA-project, which aims to increase logistics and trade options knowledge among manufacturing, wholesale, export logistics companies and other stakeholders and to facilitate and boost cross-border cooperation between Oulu-Kainuu region and Karelia (LOGOKA, 2020).

In this special issue report, I will first go through some of the previous studies relating to Finnish-Russian e-commerce and e-commerce logistics. Secondly, I will provide more details about e-commerce logistics and e-commerce in Finland and in Russia. Finally, I will share results relating to parcel tracking experiment that I conducted in February 2021 until June 2021.



Figure 1 1st parcel reached its destination, Petrozavodsk

2. PREVIOUS ACADEMIC RESEARCH

In 2013, Annala, A. and Jokinen J. studied e-commerce businesses and their needs regarding logistics services. For their study, they chose Schenker as a company from whose perspective the study was done. The goal was to find out for Schenker, what are the needs of e-commerce businesses in terms of logistics.

Based on the study, Annala, A. and Jokinen J. (2013, 32.) stated that from their logistics partner, e-commerce businesses require holistic service that comes with competitive pricing and distinct services. E-commerce businesses expect that their logistic partner has the ability and desire to take care of their customers. Furthermore, if e-commerce businesses desire to grow outside domestic market, then it was seen as a hugely positive factor if the logistic partner is an international actor. Lastly, the study found out that e-commerce businesses also want a good tracking service alongside with clear and distinct service.

Borovikova, A. (2015) conducted a research on e-commerce in Russia from the point of view of a company and customer. The aim of the research was to find out, which factors Finnish e-commerce businesses have to take into consideration when planning and starting their business in Russia, in order to get Russian consumers interested into buying their products.

Borovikova, A. (2015, 42) states that the key findings of her study were that Russian consumers appreciate e-commerce businesses that offer great customer service in Russian, fast delivery and good payment methods. On the contrary, Finnish e-commerce businesses that have the will to do business in Russia should take into consideration the following factors: delivering good customer service, thoroughly planned business strategy, and focus on knowing the Russian market extremely well.

In 2015, Ronkainen, A. conducted a research on starting a business in the Russian market from the point of view of culture, selling, logistics, and authorities. Based on the research, Ronkainen, A. (2015, 3.) points out that knowing cultural aspects the language play a huge role in starting a business in the Russian market. Furthermore, maintaining good relationships was seen as a key factor in creating long lasting business relationships, whilst being ready to expect the unexpected. This means that in Russia, there is a good chance that problems with customs and different authorities rise. Making distinct sales contracts is vital, and the know-how on how to separate bribes from gifts important as well. Lastly, Ronkainen, A. found out

that the best marketing channels in the Russian market are internet marketing and face-to-face meetings.

Yalovaya L. (2016, 2) studied the logistics of Finnish e-commerce businesses operating in the Russian market. The goal of the research was to find out how the logistics actually work, and what are the cross-border challenges and possible solutions to these challenges. Furthermore, the goal was to study what certificates and documents are needed in customs clearance and for postal matters.

Yalovaya L. (2016, 48) points out that based on the results of the research it is safe to say that Finnish e-commerce businesses have a broad variety of safe payment options for Russian customers. Furthermore, e-commerce businesses that participated in the research used a broad variety of logistics methods, which speaks on behalf of good transportation options between Russia and Finland nowadays. E-commerce businesses that used mostly air cargo were the ones who valued fast and safe delivery for small and precious cargo. Overall companies chose the right logistics method based on the shape, weight, size, timetable, and the distance. Yalovaya (2016, 49) also adds that an important part of minimizing risks in terms of logistics is to go through possible risk factors already in the trading phase.

Yalovaya L. (2016, 49-54) also found out that the duration of customs and certification depends on company. Customs control depends on where the parcel is going and certification depends on exactly which certificate is required. E-commerce companies use different type of storing, as some companies deliver the order straight to the customer, and some store their products in supplier's warehouse, outsourced warehouse or transportation terminal. When it comes to return logistics, the research found out that return logistics is expensive and takes a lot of time. It is necessary to produce separate documentation package for return logistics, which takes time. Furthermore, Yalovaya states that Finnish e-commerce companies encounter problems mostly with customs in terms of their demands and bureaucracy. Also, there have been problems with reliability of delivery and trustworthiness. As a main solution to these problems, the research found out that ongoing and thorough communication with the customer is the most vital factor, where the terms of the delivery are agreed upon as accurately as possible.

3. E-COMMERCE LOGISTICS

The Internet offers a huge variety of many types of products and services. In terms of logistics, the most important difference to a traditional physical store is the need to deliver the goods. As a large part of consumer e-commerce is also international, this share of logistics is emphasized. Logistics plays a significant role as part of the service, and even a factor influencing purchasing decisions. While the home delivery of products is traditionally handled by the customer himself, in an online store (including e-commerce, internet commerce, e-commerce or e-business) the goods are delivered directly from the warehouse to the customers, mainly without intermediate warehouses. This affects the logistics in many ways such as, centralizing storing (which can be done also internationally), size of shipments gets smaller as orders are delivered to single customers, the number of shipments grows larger, and the volume and significance of home deliveries and close logistics becomes more important. (Logistiikan Maailma, 2020.)

According to statistics, e-commerce has grown vastly in recent years, growth of approximately 10% per year, and that growth is expected to continue. These statistics include both domestic and foreign online stores. During 2020, growth in many regions has been as high as hundreds of percent during a pandemic, but whether or not the growth will continue is still a question of debate. (Logistiikan Maailma, 2020.)

E-commerce is largely dominated by companies operating abroad. This has a clear impact on the need for logistics services, especially when it comes to distribution logistics. For example, when Amazon starts business in the Scandinavian market, it will significantly change the situation in terms of competition. Various content that is now possible to download online, has replaced, in a major way, the sale of music, movies and computer programs from stores, among others. (Logistiikan Maailma, 2020.)

The growth in e-commerce volumes predicts major changes in the structure of traditional commerce and also in logistics. Consumers have learned to buy directly from foreign online stores. The UK, Germany, the US and most recently China have increased their share of e-commerce sales. The most important product groups, regarding e-commerce, are consumer electronics, which almost half of the buyers have purchased from the online store. In addition,

clothing, shoes and media products are sold significantly online. (Logistiikan Maailma, 2020.)

3.1 FACTORS TO CONSIDER IN RELATION TO E-COMMERCE LOGISTICS

E-commerce logistics is an important part of the customer experience, even if the delivery of the goods itself is performed by a third party. To offer different delivery methods and clear pricing of the e-commerce, helps e-commerce businesses to smoothly guide the customer towards the purchase. On the other hand, unclear pricing and the wrong kind of delivery methods often cause the customer to leave the shopping cart and move elsewhere for shopping. Furthermore, when the customer orders, the status of the delivery must be clearly communicated so that the customer knows when the package can be expected to arrive. When the order finally arrives to the customer, the customer gets the first real physical impression of your business. Thus, packaging and product launch also affect the image of e-commerce businesses. (Woolman Oy, 2018.)

Woolman Oy (2018) also point out that there are a couple of important factors, which ecommerce businesses need to take into consideration when choosing the right delivery methods. These factors answer the questions what is delivered and to where? When a company delivers products to Finnish market only, Posti and Matkahuolto are probably the best choices, but if the aim is to deliver products to countries outside Finland, then Posti and Matkahuolto might not be enough. This is something that is covered also in this special issue's parcel tracking part. Pricing, packaging and communicating to customers concerning delivery methods are seen as essential parts of e-commerce logistics.

When it comes to pricing, e-commerce businesses may choose free shipping, same pricing for every product, or weight-based pricing. No matter which pricing method is chosen, the key part is to clearly share the information regarding the costs to customers. Correctly done pricing leads to better conversion rate and increases the amount of average order size. Furthermore, packaging plays an important role as when customer receives the product, it is the first time that the customer gets a physical touch with the e-commerce business. Packaging should be done in a way that it supports the brand image. Alongside with pricing and

packaging, as was already mentioned above, communication regarding delivery methods should be done in a clear way. This means that the customer should know about the delivery methods and its pricing already before going to check-out, so that they do not come as a surprise in the final part of the purchasing. (Woolman, 2018.)

4. CURRENT STATE OF FINNISH E-COMMERCE

In 2020, the total revenue of Finnish e-commerce is estimated EUR 11.8 billion. In 2020, ecommerce has become part of the basic everyday life of Finns. Already 73% of Finns said they had bought from online stores within 28 days. In younger age groups, active online shopping was even more common, as up to 84% of those under 50 said they had done online shopping in previous weeks. The coronavirus pandemic contributed to the day-today running of e-commerce. Many industries experienced quite a digital leap as more and more companies started to do business online. Despite of the growing popularity of online shopping, the total turnover of e-commerce will remain at around EUR 2 billion less than in the year 2019. The total turnover was affected especially because of sudden drop in tourism and demand in traffic, which brought industry revenue down. Online retailers, because of COVID-19, were divided into very different positions in the e-commerce market, as for example, restrictions on movement and remote life brought a lot of new customers for online retailers (for example, online stores for food). The share of goods trade in the turnover of e-commerce was indeed a whopping 58 percent. On the contrary, the share of tourism that previously dominated Finnish e-commerce collapsed to 16 percent of revenue. Furthermore, services accounted for about a quarter of net sales, which is about 26 percent. (Paytrail, 2020, 5.)

The distribution of e-commerce in Finland in 2020 looks very different compared to previous years. The COVID-19, which caused restrictions and changes in consumer behavior on goods, lead to the result that significantly more were goods were sold, while the share of tourism fell sharply. For years, the share of three areas (travelling, goods, services) of e-commerce business remained the same, but as already mentioned above, 2020 brought a huge change. More than half (58%) of the total turnover of e-commerce came from merchandise trade, which has previously accounted for about a third of the entire e-commerce. In 2020, a wide range of products were ordered from the online stores, which included many products that were previously not bought online. The share of tourism, on the other hand, has been close to half of the e-commerce in previous years, but by 2020, its share fell to 16 percent. Increased climate awareness curbed the growth of tourism already in 2019. This got many consumers to reduce, among other things, air travel and long-distance travel. Travel restrictions and authorities' recommendations to avoid travelling in 2020, from time to time,

stopped air travel completely. The share of services rose from about 20 to 26 per cent. With restrictions on movement and appointments, new types of e-commerce online services were established. One example could be, for example, online training services. (Paytrail, 2020, 6.)

One trend that Finnish e-commerce customers seem to have is buying their goods and services from Finnish e-commerce businesses. In 2020, it was estimated and studied that 62% of Finns did their online shoppings on Finnish websites. These statistics demonstrate the growing popularity of buying local products and services in order to support Finnish businesses. (Paytrail, 2020, 24.)

One of the growing trends now seems to be shopping using mobile gadgets and making more climate friendly purchasing decisions. The e-commerce businesses who have survived the COVID-19 period, will have to focus on sustainable solutions in the future after the pandemic. One good example of this would be online second-hand stores for clothing. (Paytrail, 2020, 31.)

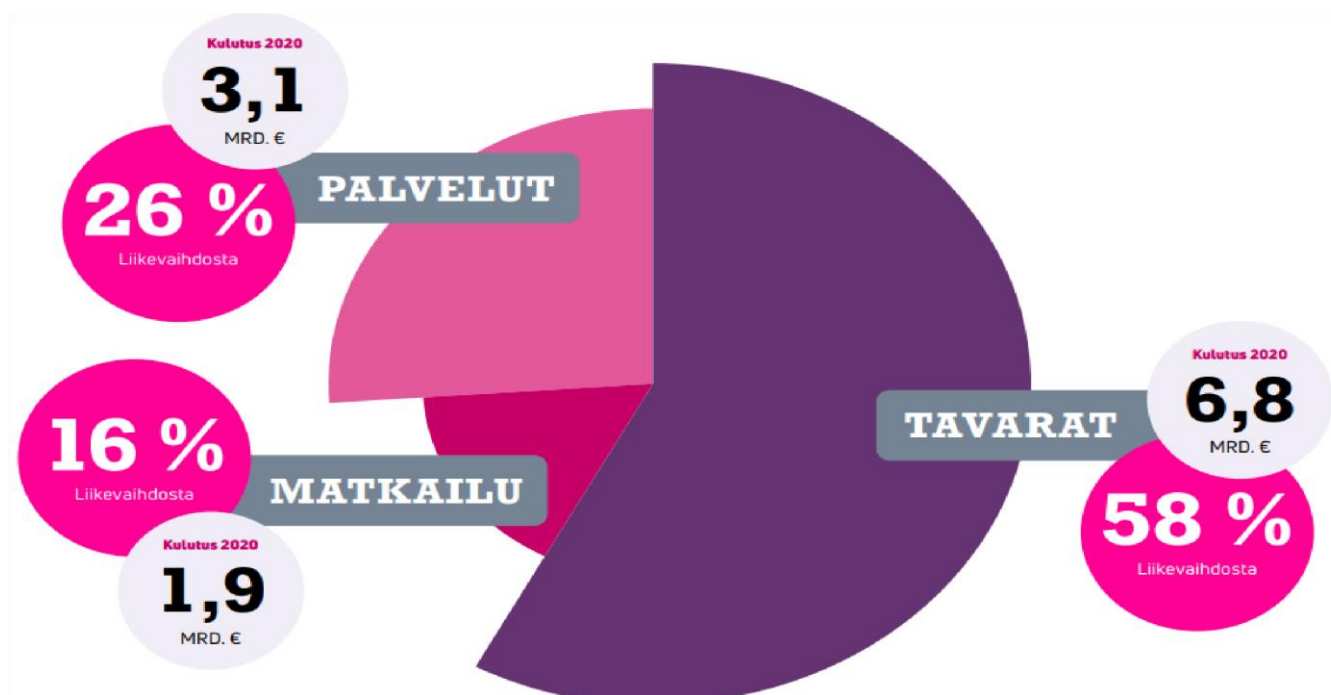


Figure 2 Finnish e-commerce share in 2020(Paytrail, 2020, 6.)

5. CURRENT STATE OF RUSSIAN E-COMMERCE

In Russia, the share of e-commerce is not so large yet: about 4% of the total retail sales, but at the same time, Russia demonstrates one of the highest rates of growth in online commerce. In 2018, foreign and local investors invested more than \$750 million in the Russian online trading market. This estimate was given by the East-West Digital News (EWDN) agency based on data from open sources, information from Yandex.Market, Ozon, Lamoda and other market participants, as well as Dsight and Data Insight analysts. This is a record figure for the entire observation period (since 2014). On the contrary, in the total volume of investments in e-commerce in the world, Russia occupies only 1%. (AdIndex, 2018.)

Of the \$750 million raised from investors, most (\$500 million) came from Sberbank's investments in a joint venture with Yandex (the deal was closed in April 2018). In March 2018, Ozon raised \$61 million from current shareholders - Baring Vostok and MTS (Mobile TeleSystems) funds, as well as about \$80 million more in late 2018 - early 2019. In addition, among the transactions, analysts noted Tinkoff Bank's investments in Kassir.ru (\$40 million), MTS's investments in the YouDo service (\$17 million) and S8 Capital investment in the Price.ru (\$12 million). (AdIndex, 2018.)

5.1 CHARACTERISTICS OF RUSSIAN E-COMMERCE MARKET

Russian online trading generally follows the main global development trends but has a number of features and differences in comparison to other countries. Here are the main trends, which are noted by experts and market participants (AdIndex, 2018):

- 1) "Cheap" money abroad. This means that a foreign business can make rather large investments at the start, and as a result, the consumer is presented with a ready-made and well-functioning product. In Russia, money is "expensive", so a new online store is launched, as a rule, with minimal investments: a narrow assortment, a minimalistic site interface, etc., because it is important to get the first profit as soon as possible and then consider development and improvements.

- 2) In the West, consumers often prefer giants (for example, Amazon) to buy all categories of goods. There is no clear leader in the Russian market yet, so all large stores are fighting for this title. And if in the western markets the online stores are limited to the content provided by the manufacturer (and therefore the data on the same goods in all stores are practically the same), then in Russia product content plays a great role in attracting customers.
- 3) In the foreign e-commerce market, there are many highly specialized services for online stores, covering all customer demands. Russian e-commerce is still far from this: the market is not so developed, and most of the emerging problems (from technical to legal) have to be solved by in-house.
- 4) Foreign online stores usually do business with suppliers on the basis of permanent and long-term relationships. In Russia, large players very often dictate their terms to suppliers, while small stores, on the contrary, work on suppliers' terms. At the same time, both suppliers and stores can suddenly change the terms of cooperation in an unstable economic situation.
- 5) A large share of self-pickup of goods from Russian stores and points of delivery of orders (pickup points). Also, the predominant method of payment is payment when receiving the goods.
- 6) Hyperconcentration of online trading in Moscow and large cities.

(Russia's top e-commerce sites listed starting from the biggest Wildberries.ru. Full list can be found from AdIndex, 2018.)

Alongside with trends, the e-commerce market in Russia as a whole has formed and has entered the stage of stable development. The main players have settled their positions, and the structure of the market in the near future will largely be determined by the strategies of their actions. (AdIndex, 2018.)

1	wildberries.ru	Одежда, обувь и аксессуары	111 200
2	citilink.ru	Электроника и техника	73 200
3	mvideo.ru	Электроника и техника	52 800
4	ozon.ru	Универсальные магазины	41 770
5	dns-shop.ru	Электроника и техника	38 810
6	lamoda.ru	Одежда, обувь и аксессуары	29 030
7	eldorado.ru	Электроника и техника	24 500
8	svyaznoy.ru	Электроника и техника	19 720
9	technopoint.ru	Электроника и техника	19 080
10	petrovich.ru	Товары для дома	18 000
11	vseinstrumenti.ru	Товары для дома	17 830
12	onlinetrade.ru	Универсальные магазины	17 240
13	apteka.ru	Красота и здоровье	12 630
14	bonprix.ru	Одежда, обувь и аксессуары	11 350
15	utkonos.ru	Fmcs	10 190
16	komus.ru	Офис и бизнес	10 090
17	ulmart.ru	Универсальные магазины	9 930
18	detmir.ru	Товары для детей	9 680
19	sima-land.ru	Универсальные магазины	9 540
20	ikea.com	Товары для дома	9 080
21	witt.ru	Одежда, обувь и аксессуары	8 760
22	labirint.ru	Книги и диски	8 680
23	shop.mts.ru	Электроника и техника	8 260
24	holodilnik.ru	Электроника и техника	8 050
25	kupivip.ru	Одежда, обувь и аксессуары	6 710
26	petshop.ru	Fmcs	6 040
27	kolesa-darom.ru	Автотовары	5 820
28	hoff.ru	Товары для дома	5 490
29	euroset.ru	Электроника и техника	5 230
30	220-volt.ru	Товары для дома	4 980
31	officemag.ru	Офис и бизнес	4 840
32	leroymerlin.ru	Товары для дома	4 420
33	faberlic.com	Красота и здоровье	4 420

Figure 3 Russia's top e-commerce sites listed starting from the biggest Wildberries.ru. Full list can be found from AdIndex, 2018.)

The unfavorable economic situation in recent years not only did not stop the development of the market, but even to some extent had a positive effect on it. The need for savings has stimulated the transition of some buyers from traditional retail to online. Consumers are attracted to e-commerce by a wide assortment, favorable prices and convenience, while the

first positive experience makes them regular customers of online stores. 2017-2018 saw a surge of interest in online from industries that previously had little presence in it. Among them, experts noted such categories as food, DIY (Leroy Merlin, IKEA, etc.), and medical products. (AdIndex, 2018.)

Logistics for e-commerce is actively developing. Leading companies have already been identified in this market segment, which are growing steadily, while many small players are determined to sell their business to large ones, since they are no longer able to provide the quality of service of the appropriate level. The industry was significantly influenced by the expansion of the geography of logistics companies, as well as the popularization of delivery through pickup points and checkpoints. These type of delivery pickup points and checkpoints are more economical both for online sites and for buyers. (AdIndex, 2018.)

The price of the so-called admission ticket to the e-commerce market has increased significantly. Now, for a successful start of a new project, clients need to make an offer equal in scale to the one with which the market leaders are already working. At the same time, the saturation of the industry and the amount of necessary investments have significantly increased the risks of entrepreneurs. This naturally means that the losses can be much greater than a few years ago. Therefore, expecting new significant startups that could have a significant impact on the industry, is to be considered as a rare occasion. (AdIndex, 2018.)

5.2 CLASSIFICATION OF RUSSIAN E-COMMERCE PLATFORMS

Depending on products that the biggest Russian e-commerce businesses offer, B2C ecommerce can be divided into the following main groups (AdIndex, 2018):

1. Megamarkets (department stores) - websites with the maximum range of products.
This group also includes online divisions of large offline retailers.
2. Online stores, which are websites through which you can view information about a product or service of interest and place an order. The number of offered assortments varies widely. This is the most used platform.
3. Aggregator sites (marketplaces), which are specialized intermediaries that automatically collect and process information from various suppliers (offline and

online) for different product groups. Furthermore, on many of them you can now order and buy goods without going to the supplier's website.

4. Showcases in social networks, which provide an online catalog of goods or services, which are posted in an account or a group in social networks owned by a legal entity, in order to organize and promote the sale of goods / services. It is also possible to directly order and purchase a product or service of interest.

Although physical stores are still the main place of shopping, the number of people using online to shop is constantly growing, and there is an active digitalization of retail, which unfolded in the last 2-3 years. According to the TGI / Marketing Index study by KANTAR for 2019/1 quarter in Russian cities of the population aged 16+ made purchases via the Internet in a month, and 44.4% carried out the search and study of information about goods before buying. (AdIndex, 2018.)

6 PARCEL TRACKING EXPERIMENT AND CONCLUSION

As a part of my task being an assistant in LOGOKA research project, I was to conduct a parcel tracking experiment from Oulu Finland to Petrozavodsk Russia. The main goal of the experiments was to find out how fast a parcel from Finland to Russia travels, using different carriers. These two were Posti Group Oyj and WCargo Oy. One of the first plans was also to send a tracking device alongside with the parcel, but this idea was canceled after having a discussion with Russian colleagues and Finnish customs. The concern in terms of tracking device related to border control and how Russian customs would possibly get interested in a tracking device alongside the parcel. Thus, in order to avoid unnecessary problems, the tracking device was taken out of the picture. The packages were sent to a private person in Petrozavodsk without customs clearance.

First two packets were 0,25-0,5kg each and were sent via Finnish Posti service. The cost of the first package weighing 0,5kg was 9,75 euros and the cost of the second package was 3,9 euros. Interestingly, the delivery time of both of these packages were almost the same. First package arrived in 14 days and the second in 13 days. One package weighing 0,3kg was also sent from Petrozavodsk Russia to Oulu Finland, which took 15 days to arrive.

One package weighing 0,5kg was sent using WCargo Oy carrier service. The cost of this package was 32 euros. This was the standard delivery, but they also offer a fast delivery, which would have been three euros more costly. WCargo Oy was able to deliver the package to Russia Petrozavodsk in 7 days. The company also offered some details about previous deliveries to Petrozavodsk, which had taken 5-7 days. Also, the company management states that, for example, to St. Petersburg the packages arrive usually in three days. Thus, based on this experiment, WCargo Oy was able to deliver the package way faster than Posti, but it comes with a higher price.

When it comes to parcel tracking, WCargo was able to offer tracking information regarding the delivery, showing the points where the parcel had been in Russia before reaching Petrozavodsk. When it comes to Posti, no tracking information was provided. This of course, in both cases, could be seen as something that should be better able in the future. As already

above mentioned, Finnish companies expect from their logistics partners to have the possibility to track the deliveries.

Additionally, and order was made from Russian e-commerce website called Art. Lebedev Studio. The price of the order was 28 euros. Order was made in 24.05.2021 and the order confirmation came 02.06.2021. The order reached Oulu 21.06.2021. Interestingly, the shipment stayed in the Russian customs for 14 days.

As a conclusion, based on the small study, it can be said that the positive factor regarding this parcel tracking was that every parcel reached its destination. However, Posti's delivery time of two weeks, does not impress. WCargo was able to deliver the parcel faster to Russia, but this comes, of course, with a higher price. It also seems that order delivery to St.Petersburg travels quite nicely, but delivery time to Petrozavodsk is already much longer. This, of course, is a factor that should be studied more, and a factor that is hopefully fixable in the future, if and when Finnish-Russian e-commerce business grows bigger in total. As was previously mentioned, one of the major factors for Russian customers in relation to ecommerce is fast delivery. And on the other hand, Finnish e-commerce businesses want logistics partners who can deliver orders fast and offer tracking service. Tracking service system is also something that current Finnish-Russian logistics services seem to lack of. In my opinion, it is one factor that can help e-commerce businesses to trust the process, as they could follow their shipments.

As final words, the study of this subject is extremely important regarding the future of Finnish-Russian e-commerce. Kauppa.fi (2021) points out that The Russian e-commerce market is growing with both the number of buyers and the number of purchases. COVID19 has pushed the market into further growth, which will continue in the coming years. As the market has developed, logistics has improved, among other things, and logistics companies and market platforms are providing a route to the Russian consumer's digital shopping cart. At the same time, the Russian digital stores have become more active in selling to international markets, and order volumes from abroad are growing rapidly.

The results of the experiment are compiled in the table 1 below.

Table 1 Parcel tracking experiment

TIME OF SHIPMENT	WEIGHT	TIME OF ARRIVAL	PRICE
3.2.2021 (1st parcel)	0,5kg	17.2.2021	9,75 EUR
18.4.2021 (2nd)	0,3kg	30.04.2021	3,9EUR
17.4.2021 (Wcargo)	0,5kg	23.04.2021	32EUR
13.5.2021 (From Petrozavodsk)	0,3kg	28.05.2021	-
Online shopping order from Russia Order made 24.05.2021 Shipment confirmation 02.06.2021		21.06.2021	No costs regarding customs Price of the order 28EUR)

Post office

Received by addressee

April 23, 2021, 09:09 185026, Kukkovka

Came to the place of delivery

April 22, 2021 20:46 185026 Kukkovka

Left the sorting center

April 22, 2021 15:37 185960 Pervomaisky

Arrived at the sorting center

April 22, 2021 10:21 185960 Pervomaisky

Left the sorting center

April 22, 2021, 03:00 200960, St. Petersburg

Arrived at the sorting center

April 21, 2021, 12:58 200960, St. Petersburg

Figure 4 WCargo's parcel tracking service

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