

19th MEETING OF THE BSEC-URTA GENERAL ASSEMBLY

International-Bucharest Hotel
Bucharest -Romania
Monday, 16 May 2011, at 10:00hrs

BSEC OUTLOOK 2010: BSEC-URTA INTERNATIONAL ROAD TRANSPORT INDUSTRY PERFORMANCE REPORT

Collecting statistical data and analysing the situation of international road transport facilitation and performance of the industry in the BSEC region is an important task of the BSEC-URTA International Secretariat. The present study tries to indicate the performance of the BSEC region in the fields of road transport and trade in the year 2010 in comparison with previous years.

I. INTERNATIONAL ROAD TRANSPORT INDUSTRY PERFORMANCE IN THE BSEC REGION IN THE YEAR 2010

According to the data collected from the BSEC-URTA Member Associations, the performance of the industry by country is given in the tables below.

Table 1) Road transport operations in BSEC region in 2009 (updated)

2009	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SRB	TR	UA	BSEC	EU24	Others	Total
AL				115		39.431		59	4	168	278		40.055	15.397	21	55.473
AM				5	140	4			650			150	949	20		969
AZ				20	650		10		5.500		20	400	6.600	1.130	190	7.920
BG*	310					85.625		71.830	8.550	4.270	19.245	135	189.965	102.545	19.125	311.635
GE		7.921	4.380	446		2.422	98	273		26	3.354	2.044	20.964			20.964
GR																
MD	0	134	61	10.014	125	2.331		8.288	29.093	577	12.815	8.011	71.449	12.043	5.360	88.852
RO	63	0	24	308	73		201		517	8.091	2.439	4.602	16.318			16.318
RU*		896	5.661	389	7.607	1.589	937	1.516		1.009	2.582	15.460	37.646	523.828	159.814	721.288
SRB																
TR	4.559	126	35.437	25.094	30.997	27.490	1.648	32.279	5.898	5.862		4.704	352.347	187.371	741.907	929.278
UA		561	2.873	7.875	2.210	1.332	25.342	14.450	28.099	2.055	11.410		96.207	369.298	41.525	507.030

(*) assuming 20 tons per truck

2010	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SRB	TR	UA	BSEC	EU24	Others	Total
AL																
AM				7	1.050	6	1		2.600			220	3.884	20		3.904
AZ				15	700		15	10	6.000		30	400	7.170	300	267	7.737
BG*					760	99.080		40.535	2.060	13.860	36.200	56.5	192.495	124.660	22.130	339.285
GE	0	3.762	5.002	478		868	169	401		8	6.912	2.906	20.506			20.506
GR																
MD	7	207	173	8.592	165	1.756		6.971	35.782	791	15.187	8.344	77.975	8.954	8.526	95.455
RO	117	65	27		101				713	551		4.809	6.383			6.383
RU																
SRB				10.744	12	10.818		19.462	5.496		3.685	6.822	57.039	123.077	79.277	259.393
TR	3.883	38	37.772	14.651	34.721	20.244	1.859	34.173	7.568	3.915		5.185	164.009	220.290	912.518	1.296.817
UA																

(*) assuming 20 tons per truck

Table 2) Road transport operations in BSEC region in 2010

Figures 1 and 2, shows the total international trips in the BSEC region in 2009 and 2010. Three categories: trips within the BSEC region, trips to the EU24 (EU countries except BG, GR and RO) and trips to the rest of the world. Share of operations to destinations other than BSEC or EU24 has significantly increased from 28,4% to 36%, while operations within BSEC has decreased from 26,4% to 20% and slight decrease change in operations to the EU24 from 45,2% to 44%.

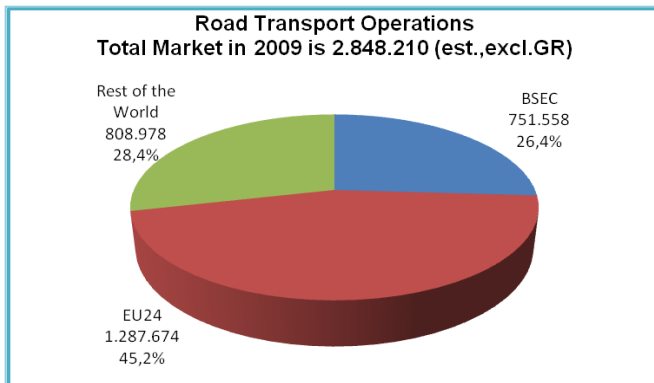


Fig.1) International road transport trips by the BSEC hauliers in 2009

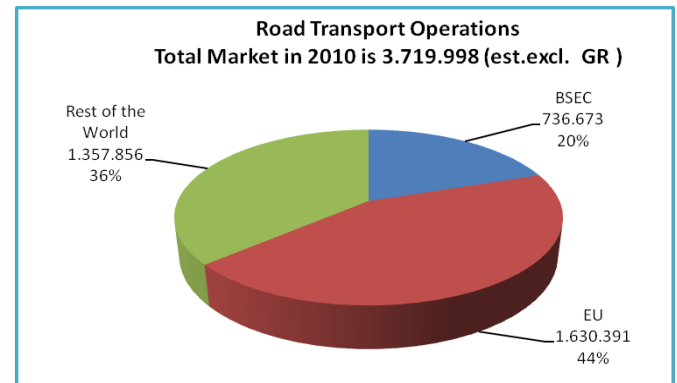


Fig.2) International road transport trips by the BSEC hauliers in 2010

Figure 3 shows the share between BSEC Countries in the whole international road transport market of the BSEC Region according to data for the 2010. Since there were no data provided for AL, GR, RUS and UA these countries are not included in the chart.

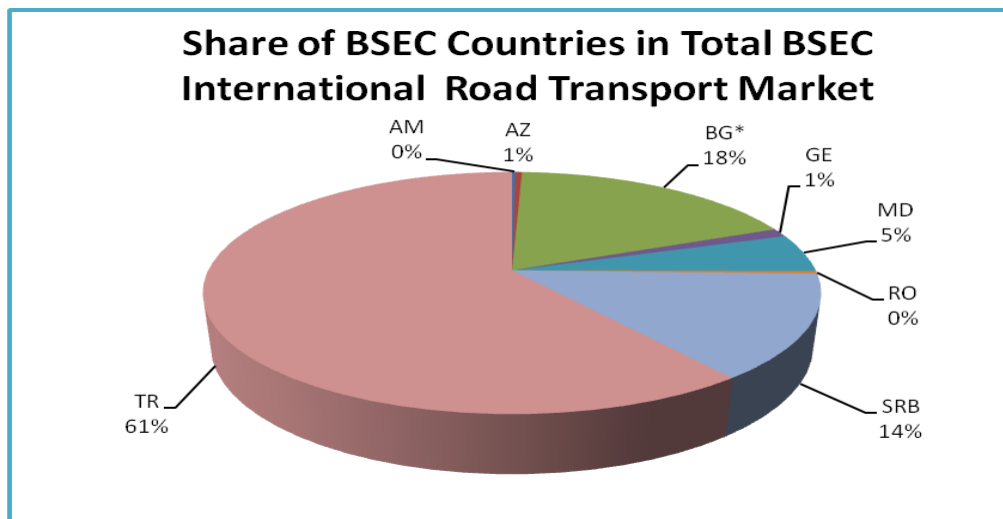


Fig.3) Share of BSEC Countries in the whole BSEC International Road Transport Market in 2010.

Table 3 shows the comparison of the situation at the BSEC International Road Transport Market in 2005-2010. Total number of trips have increased significantly to 31,7% comparing to a big decrease in 2009. It is noteworthy that the number of trips to the rest world has reached almost 70% comparing to the 2009, while there is no big change in trips within BSEC.

	2005	2006	% change to the previous period	2007	% change to the previous period	2008	% change to the previous period	2009 (upd.)	% change to the previous period	2010(*)	% weight to the previous period
Total number of trips	3.368.627	3.400.674	0,95	2.538.133	-25,36	3.028.321	19,31	2.825.029	-6,71	3.719.998	31,7%
Trips within BSEC	755.565	805.614	6,62	728.712	-9,55	814.583	11,78	733.008	-10,01	736.673	0,49%
Trips to EU	1.656.614	1.743.859	5,27	1.222.213	-29,91	1.621.897	32,70	1.283.773	-20,85	1.630.391	27,0%
Trips to Rest of the World	956.448	851.201	-11,00	587.208	-31,01	591.842	0,79	808.248	36,56	1.357.856	68,0%
BSEC Trips/Total Trips, %	22,43%	23,69%		28,71%		26,90%		25,95%		19,8%	

Table 3) Comparative table of the BSEC International Road Transport Market in 2005-2010.

(*) Estimated data preserves the tendency of the region excluding AL, GR, RUS and UA.

II. FOREIGN TRADE PERFORMANCE OF THE BSEC REGION

Based on the data provided by national statistics institutes in the BSEC Member States, the regional foreign trade performance in 2009 and in 2010 is presented in the tables below.

2009	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SRB	TR	UA	Total with BSEC	Total with World	BSEC /World %
AL				93,9		799,8		42,0	125,0	154,9	304,1	75,2	1.594,9	5.737,6	27,80%
AM				147,1	93,8	31,0		72,9	901,4		179,2	215,8	1.641,1	4.001,9	41,01%
AZ	2,7			137,1	454,9	185,4	6,7	65,1	1.815,9	1,2	1.013,7	695,7	4.378,4	20.818,2	21,03%
BG	96,4	20,9	26,4		355,0	2.976,6	66,6	2.710,0	3.465,3	734,0	2.472,2	1.262,6	14.185,9	39.674,1	35,76%
GE	3,1	130,3	544,2	235,1		74,2	5,5	126,1	310,2	1,8	1.014,2	502,3	2.947,1	5.513,0	53,46%
GR	644,7	11,9	35,7	2.527,8	36,5		47,9	1.396,9	1.596,7	386,9	2.565,8	307,0	9.557,8	79.728,2	11,99%
MD			3,8	54,7	8,6	69,8		551,3	659,7	4,3	205,5	540,1	2.097,8	4.576,0	45,84%
RO	47,6	2,3	83,4	2.831,0	184,9	1.582,7	704,9		2.805,4	823,1	4.052,5	811,3	13.929,0	94.616,0	14,72%
RU		723,2	1.779,5	2.611,3	268,5	2.631,9	1.046,4	2.434,1			19.599,9	22.900,9	53.995,7	469.023,5	11,51%
SRB	76,5	0,9	5,3	589,2	1,7	349,9	18,7	984,3	2.318,4		334,2	450,2	5.129,3	23.922,7	21,44%
TR	278,5	1,1	2.152,3	2.504,8	1.031,6	2.763,8	204,2	4.473,3	22.921,6	362,4		4.189,3	40.882,7	243.054,7	16,82%
UA	76,6	193,8	829,4	547,3	496,0	183,1	745,7	807,6	21.730,8	183,2	3.078,8		28.872,4	85.138,4	33,91%
BSEC Region Total Foreign Trade													179.212,2	1.075.804,5	16,66%

Table 4) Foreign Trade of the BSEC Countries in 2009 (in million USD)

Source: National Statistics Institutes

2010	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SRB	TR	UA	Total with BSEC	Total with World	BSEC /World %
AL				98,3		688,1		57,7			353,7		1.197,8	6.176,7	19,39%
AM				269,0	104,0	51,0		86,0	995,1		212,1	242,0	1.959,2	4.794,3	40,87%
AZ	7,0			149,5	461,4	267,0	6,2	117,2	1.918,5	1.784,4	942,3	1.354,1	7.007,6	27.960,8	25,06%
BG	94,3	27,2	29,8		398,3	3.152,2	84,4	3.681,1	4.687,3	727,1	1.550,4	1.325,5	15.757,6	46.051,2	34,22%
GE	0,9	206,0	624,4	194,0		80,0	12,2	165,3	314,0	1,6	1.104,6	662,2	3.365,2	6.678,4	50,39%
GR	655,4	12,0	26,0	2.633,3	46,1		62,9	1.338,4	6.658,2	222,5	2.686,3	351,6	14.692,7	84.549,8	17,38%
MD	3,6	2,3	7,7	67,7	13,2	111,0		633,1	990,4	9,1	273,2	620,1	2.731,4	5.397,0	50,61%
RO	64,0	13,1	143,0	3.679,4	212,7	1.577,8	794,8		3.797,5	675,8	5.661,9	1.425,7	18.045,7	11.354,5	158,93%
RU		859,1	1.947,9	3.953,5	248,0	3.275,0	1.532,1	3.372,3			25.239,7	37.155,5	77.583,1	625.395,1	12,41%
SRB	139,0			822,0		410,1		1.247,3	2.691,8		412,9	480,9	6.204,0	26.528,9	23,39%
TR	328,0	2,6	2.416,2	3.198,6	1.060,2	2.997,8	259,0	6.047,8	26.231,8	416,0		5.093,0	48.051,0	299.510,6	16,04%
UA	49,0	219,3	1.562,0	668,9	663,6	268,2	787,2	1.388,1	35.629,9	274,9	4.324,9		45.836,0	112.170,5	40,86%
BSEC Region Total Foreign Trade													242.431,3	1.256.567,8	19,29%

Table 5) Foreign Trade of the BSEC Countries in 2010 (in million USD)

Source: National Statistics Institutes

The following table shows different foreign trade indicators of the BSEC region in 2005-2010, and percentage changes between periods. There is a significant growth in 2010 in the volume of the foreign trade within BSEC and this growth can be seen in the total BSEC foreign trade as well. Although there was a slight decrease in 2009 in the percentages, but in 2010 it seems the increase in the trade maintains its position.

	2005	2006	% change to previous period	2007	% change to previous period	2008	% change to previous period	2009	% change to previous period	2010	% change to previous period
Foreign Trade Within BSEC	135,71	169,94	25,23	223,49	31,51	251,37	12,47	179,16	-28,73%	242,43	35,32%
Total BSEC Foreign Trade	805,62	997,24	23,79	1.207,44	21,08	1.413,11	17,03	1075,80	-23,87%	1256,57	16,80%
Within BSEC/Total BSEC	16,85%	17,04%		18,51%		17,79%		16,65%		19,29%	

Table 6) Foreign trade of the BSEC region in 2005-2010.

III. WAITING TIMES AT BSEC BORDERS

Using the IRU Border Waiting Times Observatory (BWTO) data, the BSEC-URTA International Secretariat analyzed the situation at the BSEC borders – internal and external – as available. This data is supplied to the IRU by its Member Associations. Analysis of the data for 2010 is presented below.

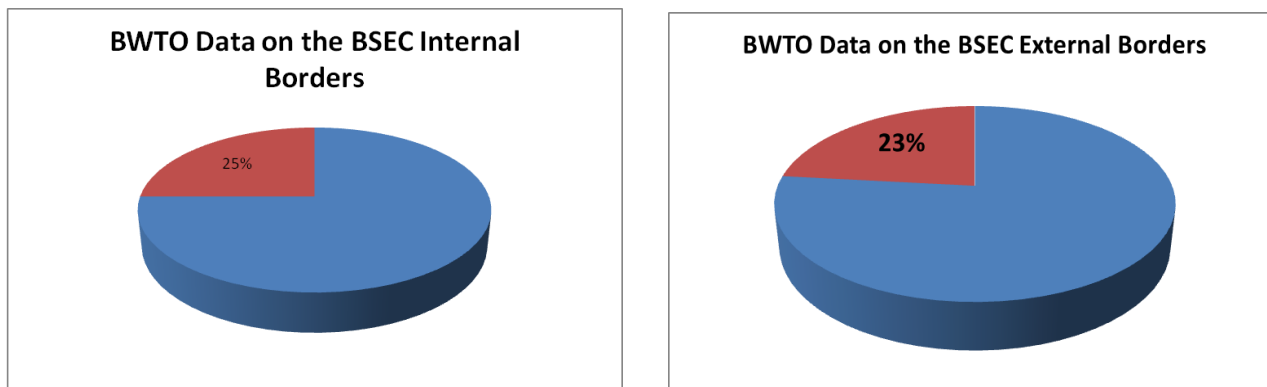


Fig. 4) BWTO Data on the BSEC Internal (5 out of 20) and External (7 out of 30) borders.

The data coverage of BSEC internal and external borders in 2010 has decreased to percentages illustrated in Fig.4.

In average, waiting times at BSEC borders have increased both at internal and external borders in 2010, with the average value of 315,8 minutes (see Fig.5).

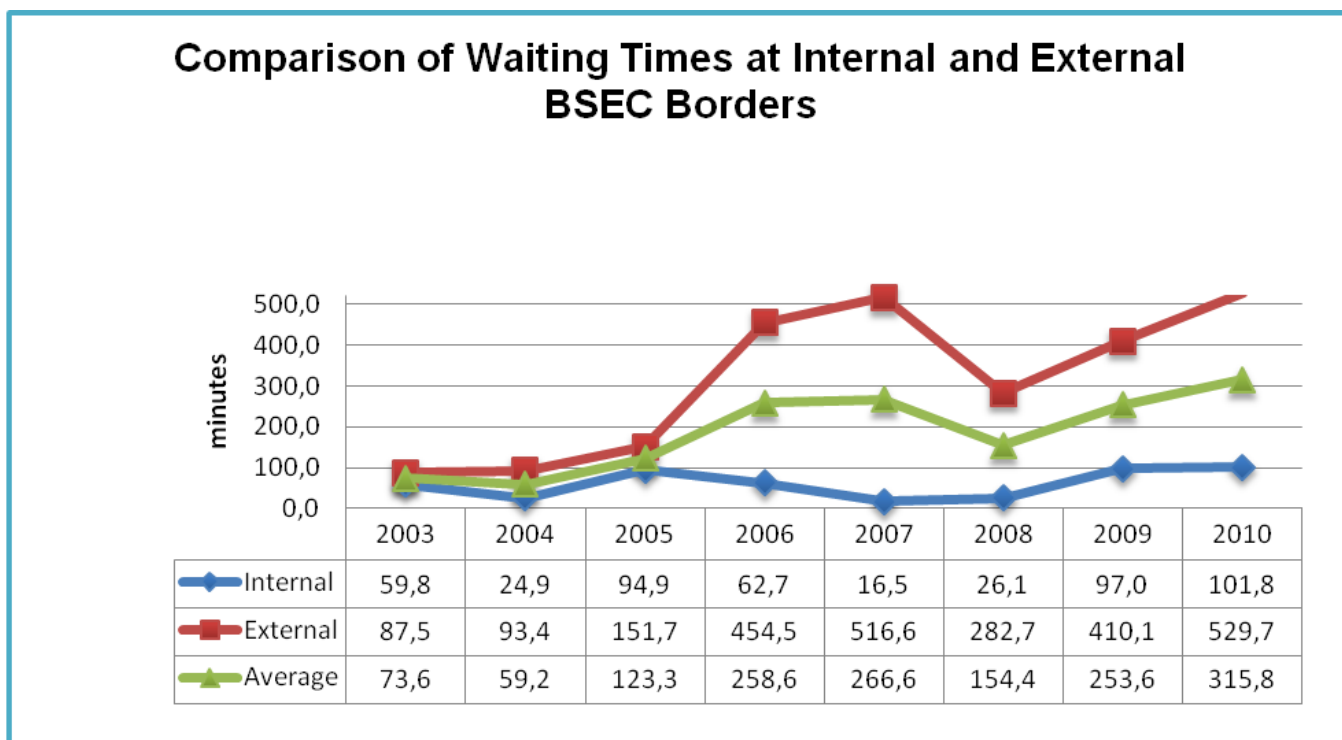


Fig. 5) Comparison of waiting times at Internal and External BSEC borders, and their average.

SITUATION AT BSEC INTERNAL BORDERS

	2003	2004	2005	2006	% change to the prev. period	2007	% change to the prev. period	2008	% change to the prev. period	2009	% change to the prev. period	2010	% change to the prev. period
BG-GR	67,0	56,5	141,6	120,0	-15,2%	0,0	-100,0%	0,0	0,0%	108,3			
BG-RO	52,0	14,0	30,4	28,7	-5,7%	0,3	-99,0%	21,0	7536,4%				
BG-SRB	90,0	7,0	269,9	115,3	-57,3%	18,0	-84,4%	38,0	111,1%	135,4	256,3%		
BG-TR	30,0	35,0	83,4	81,6	-2,2%	81,0	-0,8%	104,0	28,4%	121,2	16,6%	235,7	94,5%
RO-SRB		20,0	18,8	15,0	-20,0%	8,5	-43,3%	8,0	-5,9%			32,2	
RO-UA		17,0	25,5	15,9	-37,8%	4,0	-74,8%	1,8	-55,5%	60,0	3270,8%	90,9	51,5%
RO-MD						4,0		1,9	-53,3%			4,0	
RUS-UA								34,0		60,0	76,5%	146,3	143,9%
Average	59,8	24,9	94,9	62,7	-33,9%	16,5	-73,6%	26,1	57,7%	97,0	271,9%	101,8	5,0%

Table 7) Waiting times at Internal BSEC Borders (in minutes) and percentage change.

Table 7 and Figure 6 illustrate the situation at internal BSEC borders. Number of internal BSEC borders covered by BWTO is five; there is lack of data for Bulgarian borders with GR, RO and SRB in 2010.

In 2010, waiting times are observed to increase significantly.

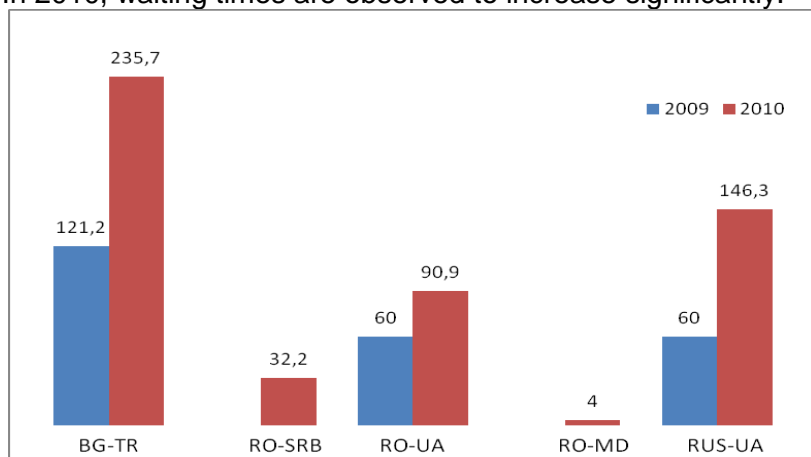


Fig. 6) Waiting times at Internal BSEC Borders

SITUATION AT BSEC EXTERNAL BORDERS

	2004	2005	2006	% change to the previous period	2007	% change to the previous period	2008	% change to the previous period	2009			% change to the previous period	2010			% change to the previous period
	average	average	average		average		average		in BSEC	out BSEC	average		in BSEC	out BSEC	average	
RUS-EST	241,0	998,6	1602,8	60,5%	2506,5	56,4%	1212,4	-51,6%	1648,6	1935,0	1791,8	47,8%	1520,4	2219,2	1869,8	4,3%
UA-BY	27,5	21,7					60,0		50,5	60,0	55,2	-8,0%	-	-	-	
UA-PL	197,0	97,1	265,5	173,3%	382,1	43,9%	671,8	75,8%	203,4	145,6	174,5	-74,0%	271,5	114,8	193,1	10,7%
UA-HUN	97,5	41,3	355,0	759,4%	171,0	-51,8%	177,2	3,6%	111,7	80	95,9	-45,9%	87,8	4,3	46,0	-52,0%
UA-SLO	65,5	26,6			600,0		269,1	-55,2%	120,0	241,4	180,7	-32,8%	179,8	199	189,4	4,8%
RO-HUN	59,0	68,7	42,0	-38,9%	2,8	-93,4%	8,4	203,8%					-	-	-	
SRB-MKD	60,0	61,5			16,7		12,4	-25,5%					-	-	-	
GR-MKD	63,5	65,0			70,8		25,0	-64,6%					-	-	-	
BG-MKD	30,0	38,8	7,0	-81,9%	38,7	452,9%	35,2	-9,1%	113,5	73,5	93,5	165,9%	-	-	-	
SRB-HUN		97,5			15,2		9,8	-35,2%	29,6	21,6	25,6	160,4%	-	-	-	
RUS-FI					768,3		493,1	-35,8%	680,0		680,0	37,9%	-	-	-	
RUS-BY					93,8		80,5	-14,2%					-	-	-	
RUS-LT					584,8		421,7	-27,9%	453,4	483,7	468,6	11,1%	-	321,3	321,3	-31,4%
RUS-LV					1758,8		394,9	-77,5%	377,6	852,9	615,3	55,8%	483,2	1104,3	793,7	29,0%
RUS-PL					223,4		369,2	65,3%	289,1	370,2	329,7	-10,7%	411,9	177,4	294,6	-10,6%
average	93,4	151,7	454,5	199,6%	516,64	13,7%	282,71	-45,3%	370,7	426,4	410,1	45,0%	492,4	591,5	529,7	30,0%

Table 8) Waiting times at External BSEC Borders (in minutes)

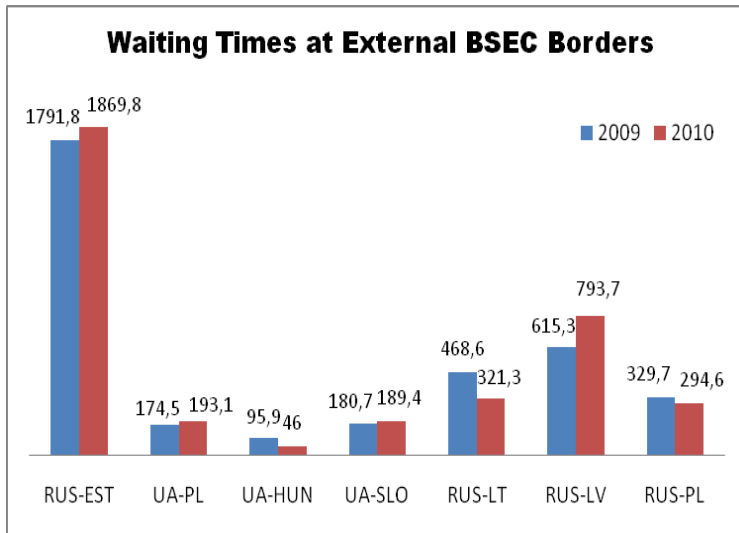


Fig. 8) Waiting times at External BSEC Borders (in minutes)

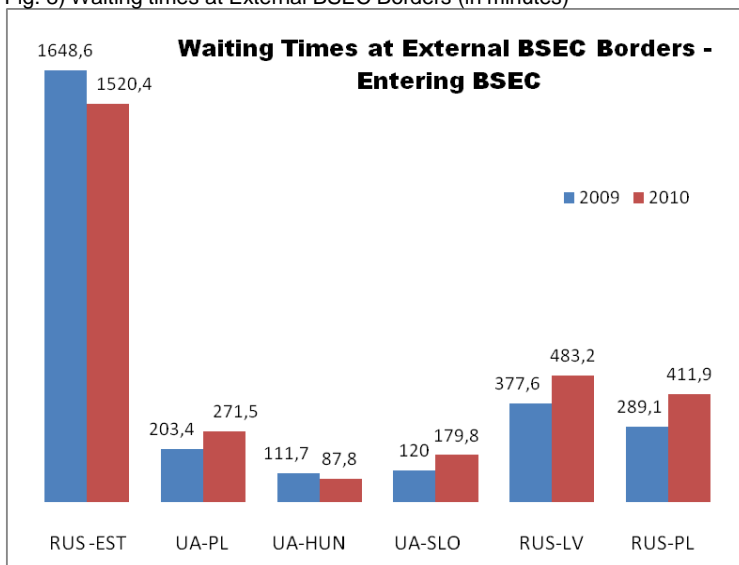


Fig. 9) Waiting times at External BSEC Borders - Entering BSEC

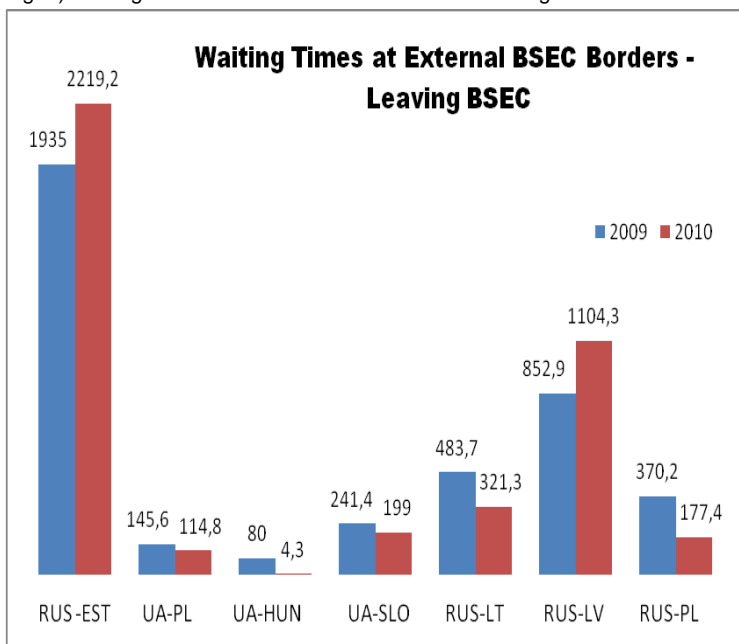


Fig. 10) Waiting times at External BSEC Borders – Leaving BSEC

Table 8 and Figures 8-10 illustrate the situation at external BSEC borders. There were no available data for UA-BY, RO-HUN, SRB-MKD, GR-MKD, BG-MKD, SRB-HUN, RUS-FI and RUS-BY borders in 2010, therefore the BWTO coverage of external BSEC borders decreased to 23,0%.

Average waiting time at external BSEC borders in 2010 was 529,7 minutes, which decreased by 30% comparing to 2009.

At three borders situation observed to be improved while the rest four borders demonstrate degradation of corresponding indicators.

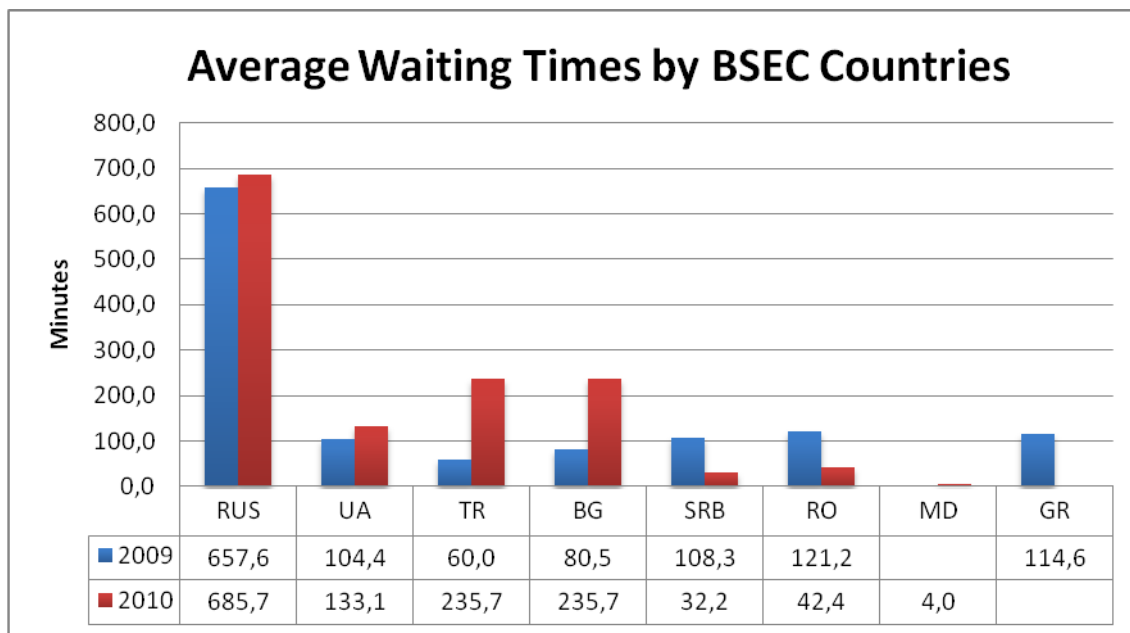


Fig. 11) Average waiting times by country.

Figure 11 shows the average waiting times at borders by country for 8 BSEC countries, whose borders are covered, partially, in the BWTO database, as of 2009 and 2010.

IV. CORRELATION ANALYSIS BETWEEN TRADE AND WAITING TIMES AT BORDERS IN THE BSEC REGION

Based on the data presented in sections II and III of the current report, the BSEC-URTA International Secretariat made another analysis to check if there is a correlation between the change in foreign trade volume and the border waiting times in the BSEC region. Accordingly, an index was created based on available data for 2003, of which the results are given in the table below.

	2003	2004	2005	2006	2007	2008	2009	2010
BSEC Trade	100	139,9	175,9	220,3	289,7	325,8	232,3	314,2
Internal Waiting Times	100	41,7	158,8	104,8	27,6	43,6	162,3	170,3
Non-BSEC Trade	100	127,0	154,2	190,4	226,4	267,3	206,3	233,4
External Waiting Times	100	106,8	173,4	519,4	590,4	323,1	468,7	605,4
Total BSEC Trade	100	129,0	157,5	195,0	236,0	276,2	210,2	245,6
Average Waiting Times	100	80,4	167,5	351,1	362,0	210,0	344,4	429,0

Table 10) Correlation analysis between trade and waiting times at borders in the BSEC Region