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Tüyap Fair Convention and Congress Center
Istanbul- Turkey
Thursday, 24 November 2011, at 15:00 hrs

BSEC OUTLOOK 2011-I: 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 first half of 2011 in comparison with previous years.

I. INTERNATIONAL ROAD TRANSPORT INDUSTRY PERFORMANCE IN THE BSEC REGION IN THE FIRST HALF OF 2011

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

2010-I	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SRB	TR	UA	BSEC	EU24	Others	Total
AL		0	0	72	0	23.614	0	25	2	60	203	0	23.976	14.032	11	38.019
AM																
AZ				8	350			20	3.500		7	250	4.135	630	90	4.855
BG*					760	13.070		8.190		3.095	6.560		31.675	19.415	3.555	54.645
GE	0	3.903	3.127	145		538	110	140	0	6	1.477	1.564	11.010			11.010
GR																
MD	0	4	17	5.986	47	831		4.428	11.927	258	5.496	3.924	32.918	5.449	2.337	40.704
RO	2	26	9		43				416	518		1.875	2.889			2.889
RU*	0	402	4.816	134	3.335	853	332	1.790		506	2.007	7.564	21.739	264.650	74.778	361.167
SRB																
TR	2.521	32	73.877	10.065	22.935	14.099	1.055	22.067	9.056	2.578		2.713	160.998	187.705	431.778	780.481
UA		552	2.551	6.342	2.539	1.498	17.469	11.995	20.845	1.446	7.963		73.200	303.677	87.607	464.484

(*) assuming 20 tons per truck

Table 2) Road transport operations in BSEC region in 2010-I

2011-I	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SRB	TR	UA	BSEC	EU24	Others	Total
AL				65		21.513		37	3	87	315		22.020	11.396	10	33.426
AM				4	650	3	2	5	1.620			180	2.464	12		2.476
AZ				10	1.200		10	10	2.400		100	500	4.230	370	100	4.700
BG*		170			355	44.350		26.530	4.830	1.785	26.250	655	104.925	70.480	18.775	194.180
GE		3.822	3.711	193		278	63	168		25	4.120	1.374	13.754			13.754
GR																
MD	13	17	52	219	29	137		799	8.829	63	3.145	2.794	16.097	4.751	1.434	22.282
RO	35	31	39		100				1.573	3.474		4.456	9.708		2.137	11.845
RU																
SRB	105		4	9.384	8	22.264	1	17.203	7.532		3.300	7.387	67.188	146.083	72.749	286.020
TR	1.784	33	22.676	5.607	17.792	9.561	965	16.541	4.795	1.893		2.438	84.085	115,043	463.858	662.986
UA		514	2.690	6.342	2.400	1.498	18.232	12.100	22.845	1.502	7.890		76.013	307.677	87.607	471.297

(*) assuming 20 tons per truck

Table 2) Road transport operations in BSEC region in 2011-I

Figures 1 and 2, shows the total international trips in the BSEC region in 2010-I and 2011-I. 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 increased only by 1% comparing to the last year, while operations within BSEC has increased from 20% to 22 % and slight decrease change in operations to the EU24 from 44% to 41 %.

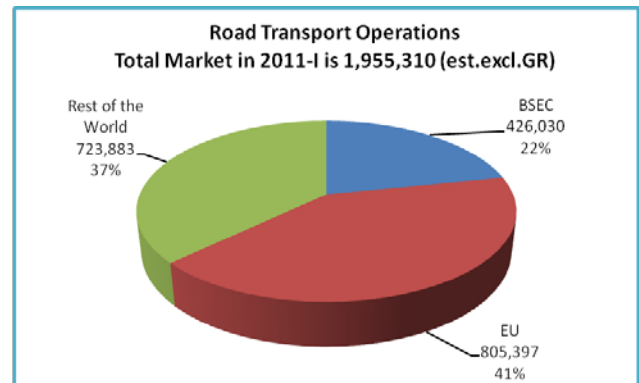
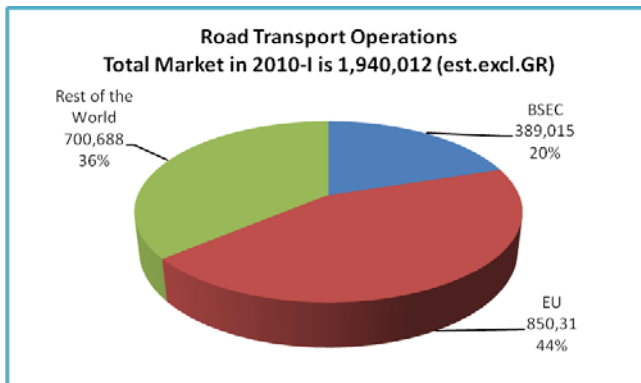


Fig.1) International road transport trips by the BSEC hauliers in 2010-I Fig.2) International road transport trips by the BSEC hauliers in 2011-I

Figure 3 shows the share between BSEC Countries in the whole international road transport market of the BSEC Region according to data for the 2011-I. Since there were no data provided for GR and RUS, these countries are not included in the chart.

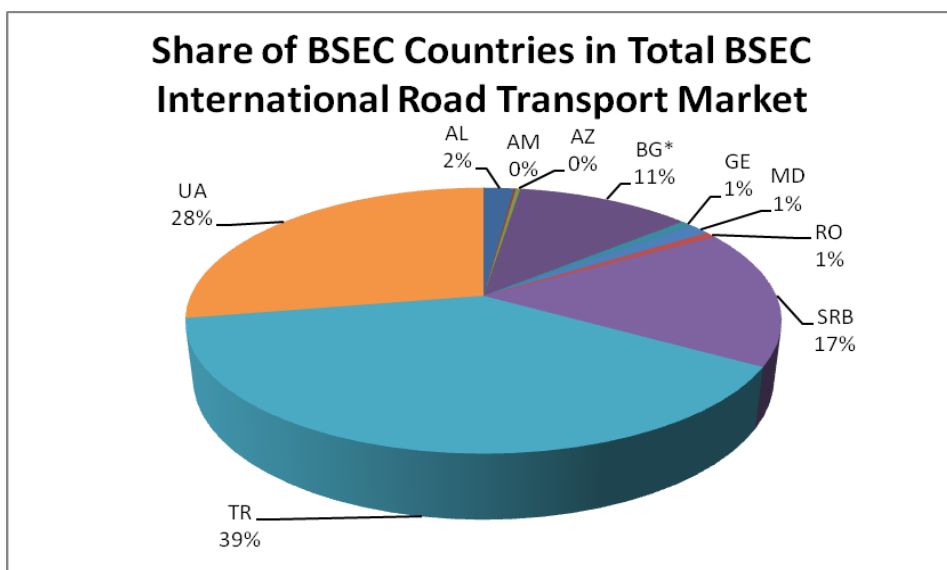


Fig.3) Share of BSEC Countries in the whole BSEC International Road Transport Market in 2011-I.

Table 3 shows the comparison of the situation at the BSEC International Road Transport Market in 2006-2011. Total number of trips in the first half of 2011 compared with the total trips of first half 2010 has a slight increase of 0,79%. Trips within BSEC in first half of 2011 compared with the same period of 2010 increased with 9,52%. Same tendency is for the trips to the so called Rest of the World which register in first half of 2011 a 3.31 increase compared with the first half of 2010. Trips to EU in first semester 2011 decreased with 5.3% compared with the same period of year 2010.

	2006	2007	2008	2009 (upd.)	2010	% change to the previous period	2010-I	% change to the previous period	2011-I(*)	% change to the previous period
Total number of trips	2,236,632	2,602,545	3,028,321	2,825,029	3,719,998	31,7%	1,940,012	68,67	1,955,310	0,79%
Trips within BSEC	659,886	728,712	814,583	733,008	736,673	0,49%	389,015	53,07	426,030	9,52%
Trips to EU	1,119,154	1,222,228	1,621,897	1,283,773	1,630,391	27,0%	850,310	66,24	805,397	-5,3%
Trips to Rest of the World	457,592	651,605	591,842	808,248	1,357,856	68,0%	700,699	86,69	723,883	3,31%
BSEC Trips/Total Trips, %	29,49 %	28,7%	26,9%	25,9%	19,8%		20,0%		21,8 %	

Table 3) Comparative table of the BSEC International Road Transport Market in 2006-2011.

(*) Estimated data preserves the tendency of the region excluding GR and RUS

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 2010-I and in 2011-I is presented in the tables below.

2010-I	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SRB	TR	UA	Total with BSEC	Total with World	BSEC /World %
AL						344,2			60,9		155,5	20,6	581,2	2.965,8	19,60%
AM				125,2	40,9	14,9		42,8	447,0		86,5	113,2	870,6	2.166,8	40,18%
AZ													2.765,0	13.147,1	21,03%
BG	46,1	10,0	13,7		185,2	1.399,5	33,4	1.540,6	2.104,3	442,8	1.404,6	543,0	7.723,2	20.615,2	37,46%
GE	1,0	89,3	298,9	81,6		37,2	5,1	75,0	151,5	0,5	496,5	287,0	1.523,5	2.949,6	51,65%
GR	307,5	5,8	4,5	1.205,0	24,7		34,6	668,8	971,7	205,6	1.241,7	123,5	4.793,5	36.464,7	13,15%
MD			2,2	25,8	6,3	57,3		268,0	423,3		128,2	253,5	1.164,6	2.297,1	50,70%
RO	33,8	4,1	105,5	1.551,6	99,6	784,5	339,5		1.858,4	435,7	2.662,0	578,9	8.453,7	36.464,7	23,18%
RU		363,7	752,4	1.582,9	125,5	1.650,4	702,8	1.511,0			12.001,8	15.929,1	34.619,6	283.783,2	12,20%
SRB				366,5		195,5		511,9	1.243,6		185,7	217,3	2.720,5	12.194,7	22,31%
TR	141,0	2,4	1.114,2	1.513,2	500,9	1.338,0	108,0	2.865,1	12.397,5	202,1		2.575,8	22.758,2	138.184,9	16,47%
UA	19,7	91,7	801,8	279,2	279,3	117,3	355,1	586,5	15.146,4	124,0	2.017,4		19.818,6	48.711,3	40,69%
BSEC Region Total Foreign Trade													107.792,3	599.945,2	17,97%

Table 4) Foreign Trade of the BSEC Countries in 2010-I (in million USD)

Source: National Statistics Institutes

2011-I	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SRB	TR	UA	Total with BSEC	Total with World	BSEC /World %
AL				44,3		324,4		23,5	43,8		207,6		643,6	3.522,9	18,27%
AM				144,1	57,0	20,0		50,0	497,0		98,7	119,7	986,5	2.498,0	39,49%
AZ													3.666,3	17.436,1	21,03%
BG	44,0	14,0	15,3		275,0	1.810,0	42,1	2.267,6	3.157,0	506,0	2.083,0	776,0	10.990,0	28.787,8	38,18%
GE	0,1	130,6	442,3	130,7		27,9	5,8	95,0	160,5	2,8	671,4	424,6	2.091,7	4.116,8	50,81%
GR	327,4	6,0	3,4	1.550,3	25,7		52,0	717,0	2.418,8	223,0	1.921,6	193,8	7.439,0	42.423,6	17,54%
MD	1,0	1,5	2,6	43,1	5,4	54,0		437,1	647,3	6,0	211,0	351,5	1.760,5	3.376,0	52,15%
RO	29,2	3,2	71,4	2.070,5	142,3	844,6	522,8		2.534,8	709,4	3.383,5	1.167,8	11.479,5	68.611,0	16,73%
RU		420,2	1.369,0	2.110,4	99,8	2.716,2	822,8	1.976,1			14.993,5	25.231,8	49.739,8	386.877,3	12,86%
SRB	72,1			400,1		237,5		914,8	1.626,7		289,1	373,1	3.913,4	15.465,0	25,30%
TR	198,3		1.033,0	2.074,5	622,5	2.019,3	271,5	3.397,0	13.763,4	278,0		3.509,4	27.166,9	185.311,0	14,66%
UA	31,0	121,8	782,2	508,1		300,0	405,2	1.024,0	24.322,1	228,0	2.697,0		30.014,2	71.196,2	42,16%
BSEC Region Total Foreign Trade													149.891,4	829.621,7	18,07%

Table 5) Foreign Trade of the BSEC Countries in first semester 2011-I (in million USD)

Source: National Statistics Institutes

No data found for Azerbaijan; Figure in red is estimation.

The following table shows different foreign trade indicators of the BSEC region in the period 2007-2011, and percentage changes between periods. For the first half year of 2011 compared with the first half year of 2010 the volume of trade has decreased within the BSEC countries by 21 % and this decrease is seen in the total BSEC foreign trade as well by 17 %.

	2007	2008	2009	2010	% change to previous period	2010-I	2011-I	% change to previous period
Foreign Trade Within BSEC	223,49	251,37	179,16	242,43	35,32%	107,79	149,89	39,05%
Total BSEC Foreign Trade	1.207,44	1.413,11	1075,80	1256,57	16,80%	599,95	829,62	38,28%
Within BSEC/Total BSEC	18,51%	17,79%	16,65%	19,29%		17,83%	18,07%	

Table 6) Foreign trade of the BSEC region in 2007-2011.

(in billion USD)

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 2011-I is presented below.

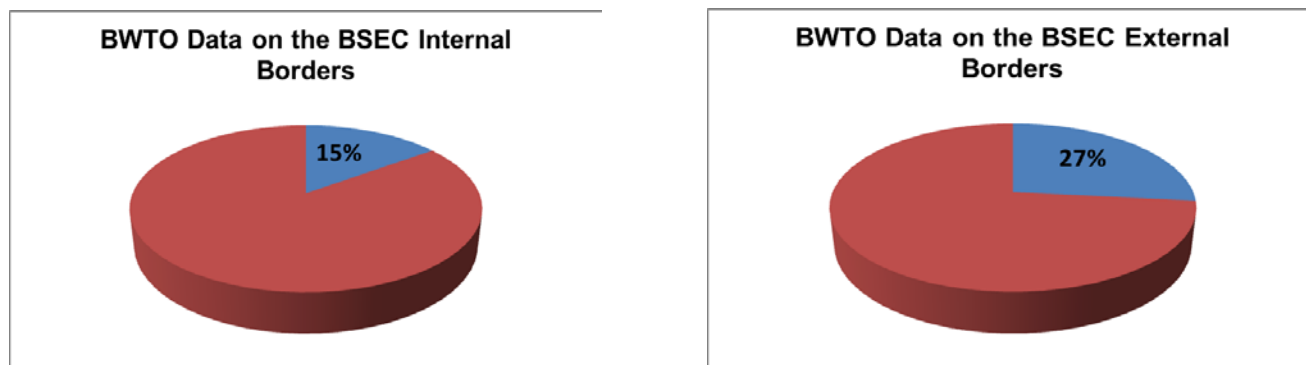


Fig. 4) BWTO Data on the BSEC Internal (3 out of 20) and External (8 out of 30) borders.

The data coverage of BSEC external borders have increased, while the data coverage of BSEC internal borders in 2011 has decreased to percentages illustrated in Fig.4.

In average, waiting times at BSEC borders have decreased both at internal and external borders in 2011-I, with the average value of 261,3 minutes (see Fig.5).

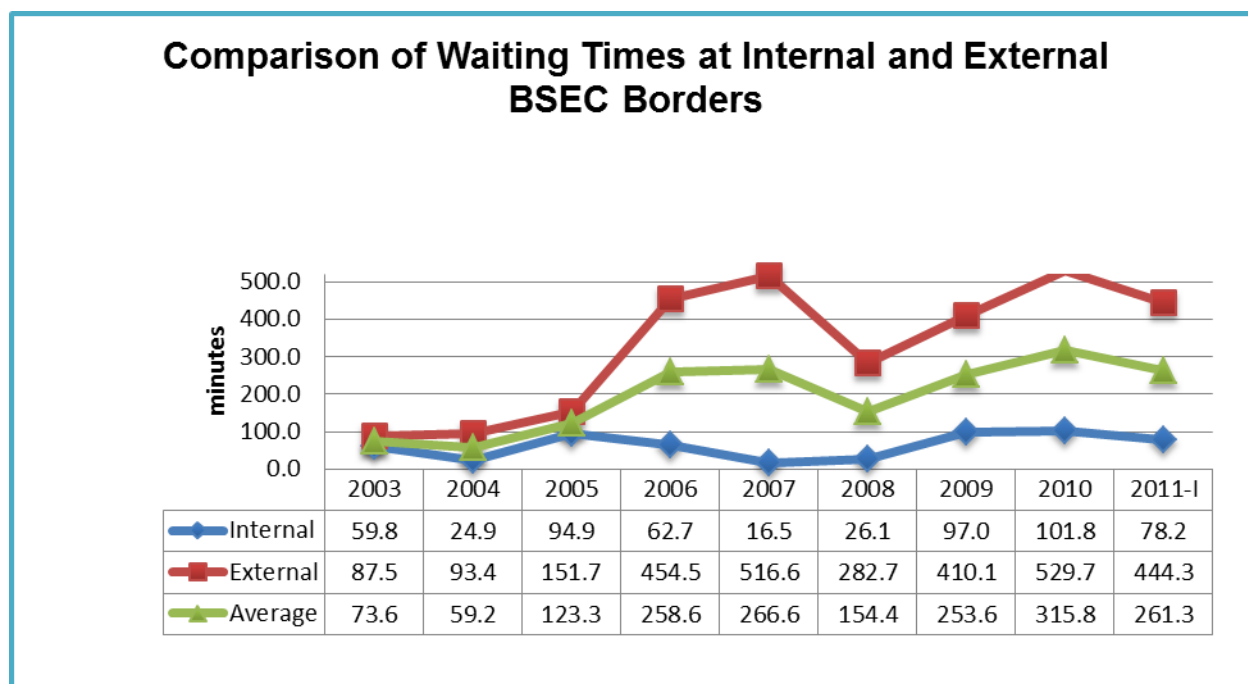


Fig. 5) Comparison of waiting times at Internal and External BSEC borders, and their average.

SITUATION AT BSEC INTERNAL BORDERS

	2005	2006	2007	2008	2009	2010	% change to the previous period	2011-I	% change to the previous period
BG-GR	141,6	120,0	0,0	0,0	108,3				
BG-RO	30,4	28,7	0,3	21,0					
BG-SRB	269,9	115,3	18,0	38,0	135,4				
BG-TR	83,4	81,6	81,0	104,0	121,2	235,7	94,5%	211,7	-10,2%
RO-SRB	18,8	15,0	8,5	8,0		32,2			
RO-UA	25,5	15,9	4,0	1,8	60,0	90,9	51,5%	10,2	-89%
RO-MD			4,0	1,9		4,0			
RUS-UA				34,0	60,0	146,3	143,9%	12,7	-91,3%
Average	94,9	62,7	16,5	26,1	97,0	101,8	5,0%	78,2	-23,2%

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 three; there is lack of data for Bulgarian borders with GR, RO and SRB and for Romanian borders with SRB and MD in 2011-I.

In 2011-I, waiting times have significantly decreased.

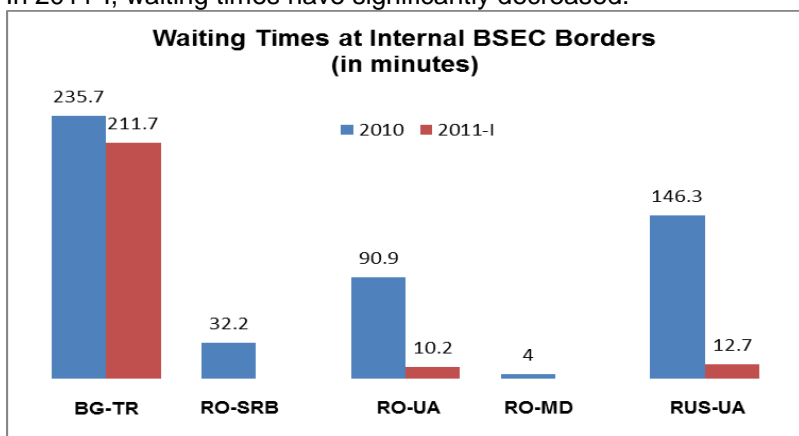


Fig. 6) Waiting times at Internal BSEC Borders

SITUATION AT BSEC EXTERNAL BORDERS

	2006	2007	2008	2009	2010			% change to the previous period	2011-I			% change to the previous period
	average	average	average	average	in BSEC	out BSEC	average		in BSEC	out BSEC	average	
RUS-EST	1602,8	2506,5	1212,4	1791,8	1520,4	2219,2	1869,8	4,3%		1815,4	1815,4	-2,91%
UA-BY			60,0	55,2	-	-	-		5	27,3	16,2	
UA-PL	265,5	382,1	671,8	174,5	271,5	114,8	193,1	10,7%	112,7	115	113,9	-41%
UA-HUN	355,0	171,0	177,2	95,9	87,8	4,3	46,0	-52,0%	212,7	246,5	229,6	400%
UA-SLO		600,0	269,1	180,7	179,8	199	189,4	4,8%	220,7	195,9	208,3	10%
RO-HUN	42,0	2,8	8,4		-	-	-		-	-	-	
SRB-MKD		16,7	12,4		-	-	-		-	-	-	
GR-MKD		70,8	25,0		-	-	-		-	-	-	
BG-MKD	7,0	38,7	35,2	93,5	-	-	-		-	-	-	
SRB-HUN		15,2	9,8	25,6	-	-	-		-	-	-	
RUS-FI		768,3	493,1	680,0	-	-	-		-	-	-	
RUS-BY		93,8	80,5		-	-	-		-	-	-	
RUS-LT		584,8	421,7	468,6	-	321,3	321,3	-31,4%		266,4	266,4	-17%
RUS-LV		1758,8	394,9	615,3	483,2	1104,3	793,7	29,0%	271,3	123,6	754,9	-4,9%
RUS-PL		223,4	369,2	329,7	411,9	177,4	294,6	-10,6%		150	150	-49,1%
average	454,5	516,64	282,71	410,1	492,4	591,5	529,7	30,0%	164,5	506,9	444,3	-16,1%

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

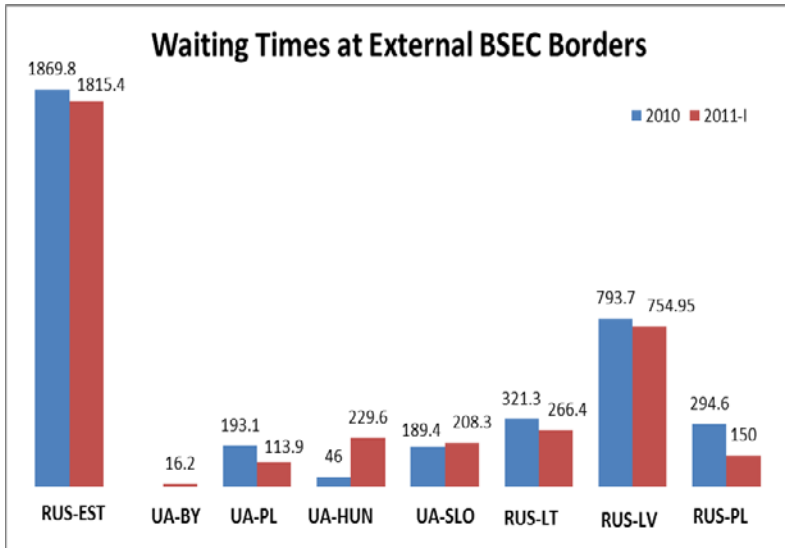


Figure 8) Waiting times at External BSEC Borders (in minutes)

Table 8 and Figures 8-10 illustrate the situation at external BSEC borders. There were no available data for RO-HUN, SRB-MKD, GR-MKD, BG-MKD, SRB-HUN, RUS-FI and RUS-BY borders in 2011-I, however the data was added for UA-BY, which increased the BWTO coverage of external BSEC borders up to 27,0%.

Average waiting time at external BSEC borders in 2010 was 529,7 minutes, which decreased by 16 % in the first half of 2011 to 444,3 minutes.

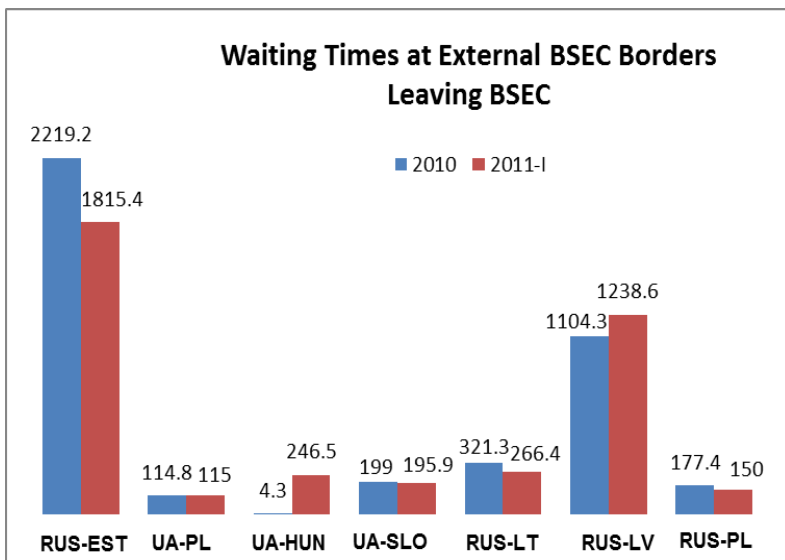


Fig. 9) Waiting times at External BSEC Borders - Entering BSEC

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

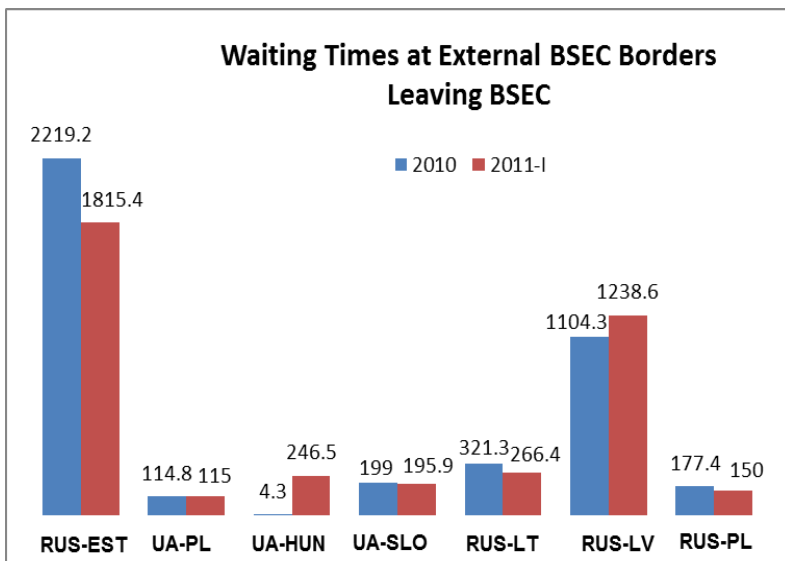


Fig. 10) Waiting times at External BSEC Borders – Leaving BSEC

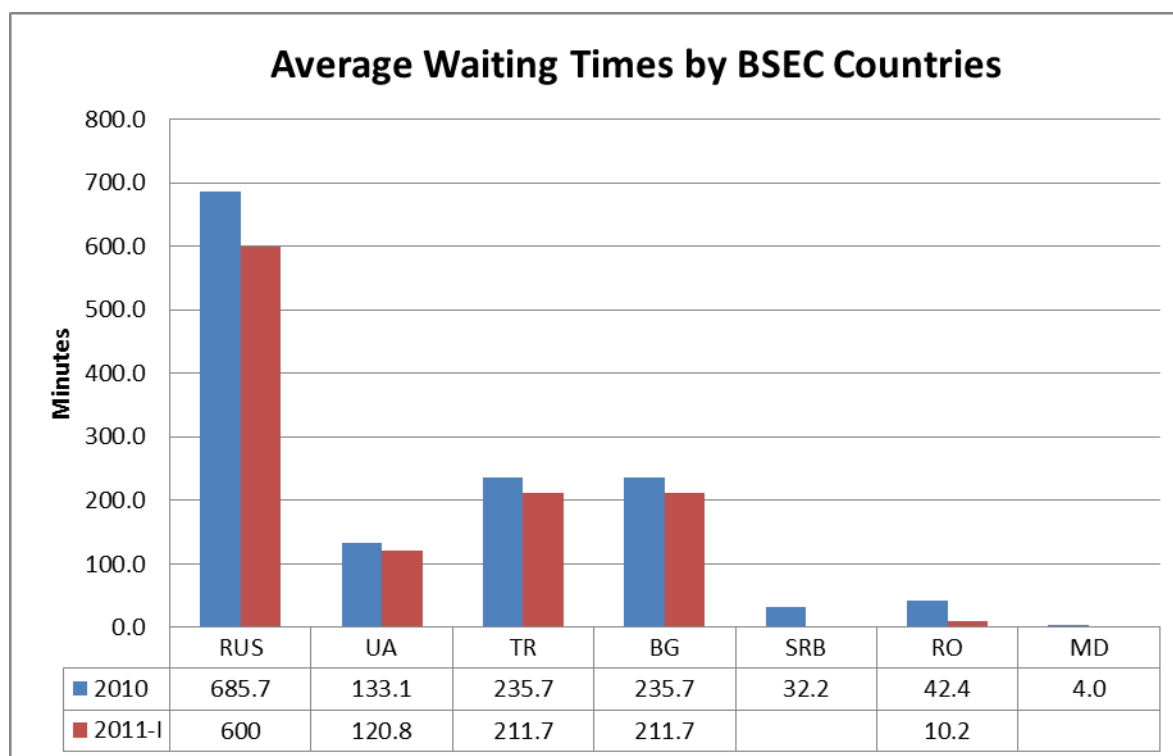


Fig. 11) Average waiting times by country.

Figure 11 shows the average waiting times at borders by country for 7 BSEC countries, whose borders are covered, partially, in the BWTO database, as of 2010 and 2011-I.

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	2010-I	2011-I
BSEC Trade	100	139,9	175,9	220,3	289,7	325,8	232,3	314,2	140,0	192,3
Internal Waiting Times	100	41,7	158,8	104,8	27,6	43,6	162,3	170,3	571,5	130,9
Non-BSEC Trade	100	127,0	154,2	190,4	226,4	267,3	206,3	233,4	113,3	156,4
External Waiting Times	100	106,8	173,4	519,4	590,4	323,1	468,7	605,4	741,2	507,8
Total BSEC Trade	100	129,0	157,5	195,0	236,0	276,2	210,2	245,6	117,2	162,1
Average Waiting Times	100	80,4	167,5	351,1	362,0	210,0	344,4	429,0	672,4	355,0

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

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