

21st MEETING OF THE BSEC-URTA GENERAL ASSEMBLY

Rogner Hotel Europapark

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BSEC OUTLOOK 2011: 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 2011 in comparison with previous years.

I. INTERNATIONAL ROAD TRANSPORT INDUSTRY PERFORMANCE IN THE BSEC REGION IN THE YEAR 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	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SRB	TR	UA	BSEC	EU24	Others	Total
AL				128		38.712		48	5	135	318		39.346	18.654	19	58.019
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	3	19	127	683	113	463		2050	19.960	150	3.473	5.763	32.804	10.191	4.152	47.147
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		633	2.924	8.885	3.611	1.745	27.854	17.497	29.953	2.029	10.417		105.548	429.300	47.675	582.523

Table 2) Road transport operations in BSEC region in 2010

2011	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SRB	TR	UA	BSEC	EU24	Others	Total
AL				127		39.614		62	8	162	605			21.756	18	62.352
AM				11	1.200	7	5	11	3.100		2	270	4.606	22	5	4.633
AZ				20	100		20	6.000	50		50	1.000	7.210	1.000	305	8.515
BG*		170			355	121.175	125	50.695	8.250	14.840	56.370	1.365	253.705	157.575	36.625	447.905
GE		4.125	4.955	974		2.310	140	845			4.350	2.915	20.614			20.614
GR																
MD	15	9	83	382	76	239		1.834	27.118	87	6.997	7.227	44.067	7.515	3.086	54.668
RO	49	40	73		165				2.971	8.386			11.684			11.684
RU																
SRB	36		13	10.722	19	11.063	11	18.977	5.889		4.119	7.953	58.802	105.497	82.943	247.242
TR	3.854	70	47.809	10.898	38.170	18.846	1.778	31.263	9.135	3.582		5.404	170.809	234.789	789.395	1.194.993
UA		860	3.275	9.183	3.395	1.660	26.990	19.845	34.204	1.847	11.194		112.453	459.429	51.036	622.918

Table 2) Road transport operations in BSEC region in 2011

Figures 1 and 2, shows the total international trips in the BSEC region in 2010 and 2011. 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 decreased by 5% comparing to the last year, while operations within BSEC has increased from 20% to 26 %, almost the same as in 2009. We observe a slight decrease in operations to the EU24 which decreased by 1%.

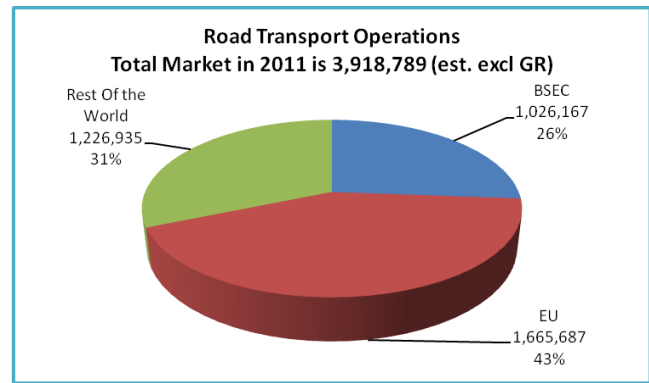
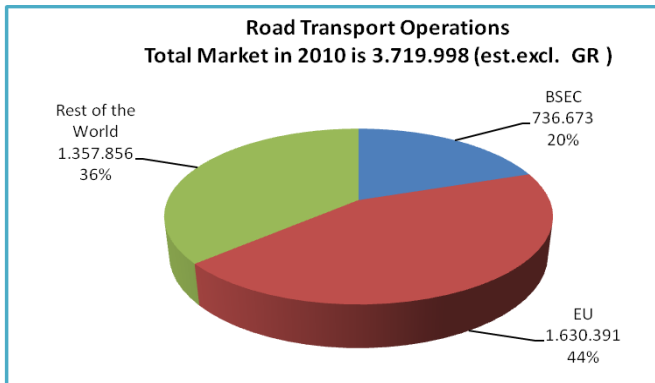


Fig.1) International road transport trips by the BSEC hauliers in 2010

Fig.2) International road transport trips by the BSEC hauliers in 2011

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. Since there were no data provided for, GR and RUS, these countries are not included in the chart.

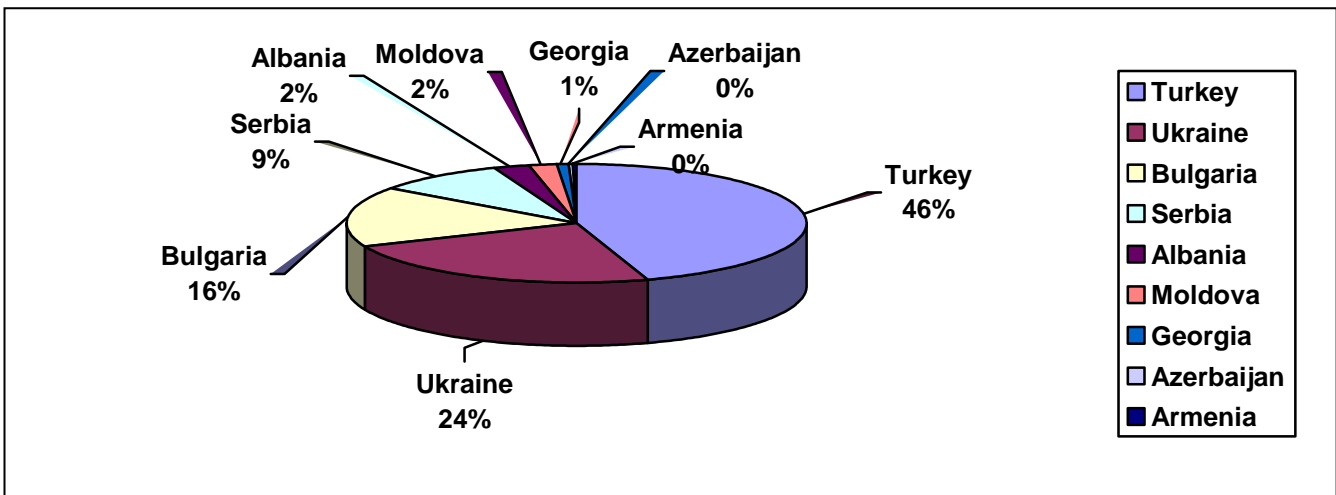


Fig.3) Share of BSEC Countries in the whole BSEC International Road Transport Market in 2011.

Table 3 shows the comparison of the situation at the BSEC International Road Transport Market in 2007-2011. Total number of trips has increased by 5.34% comparing to 2010, from which it is observed a downfall of 9,64% in the trips to the rest of the world. However, we see a significant increase in the trips within BSEC region by 39.3% and a 2.16% increase in the trips to the EU.

	2007	% change to the previous period	2008	% change to the previous period	2009 (upd.)	% change to the previous period	2010	% change to the previous period	2011(*)	% change to the previous period
Total number of trips	2,602,545	16,36	3,028,321	19,31	2,825,029	-6,71	3,719,998	31,7%	3,918,789	5,34%
Trips within BSEC	728,712	10,43	814,583	11,78	733,008	-10,01	736,673	0,49%	1,026,167	39,30%
Trips to EU	1,222,228	9,21	1,621,897	32,70	1,283,773	-20,85	1,630,391	27,0%	1,665,687	2,16%
Trips to Rest of the World	651,605	42,39	591,842	-9,17	808,248	36,56	1,357,856	68,0%	1,226,935	-9,64%
BSEC Trips/Total Trips, %	28,7%		26,9%		25,9%		19,8%		26,1%	

Table 3) Comparative table of the BSEC International Road Transport Market in 2005-2011.

(*) 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 and in 2011 is presented in the tables below.

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 4) Foreign Trade of the BSEC Countries in 2010 (in million USD)
Source: National Statistics Institutes

2011	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SRB	TR	UA	Total with BSEC	Total with World	BSEC /World %
AL				90,0		653,4		57,0					800,4	7.129,4	11,23%
AM				254,4	122,0	61,0		105,5	1.114,4		242,0	244,0	2.143,3	5.481,0	39,10%
AZ	0,1			446,3	625,0	217,0		68,0	2.828,4	2,8	1758,2	1.467,1	4.187,6	36.327,0	11,53%
BG	91,0	27,2	31,3		558,4	3.542,3	91,0	4.627,8	6.119,4	958,3	3.728,0	1.606,3	21.381,0	56.806,0	37,64%
GE	0,1	282,1	1.036,7	349,2		68,1	16,6	208,1	426,3	3,9	1.500,0	846,8	4.737,9	9.246,9	51,24%
GR	662,2	13,3	164,1	3.136,0	104,3		77,8	1.408,6	5.850,3	520,2	3.818,2	416,1	16.171,1	86.431,0	18,71%
MD	1,7	3,1	8,4	100,5	14,6	92,7		950,6	1.448,5	13,3	440,3	794,1	3.867,8	7.413,1	52,18%
RO	60,0	9,3	88,3	4.222,8	267,7	1.587,0	1.066,7		4.093,7	1.269,0	6.164,3	2.100,1	20.928,9	131.379,5	15,93%
RU		994,4	3.077,2	4.149,5	285,7	5.270,6	1.952,2	3.554,7			31.803,2	50.630,4	101.717,9	821.353,1	12,38%
SRB				806,3		510,2		1.700,7	3.449,3		591,3	595,7	7.653,5	31.916,1	23,98%
TR	396,6	0,3	2.327,2	4.098,0	1.407,0	4.122,3	453,4	6.680,3	29.948,0	568,3		6.543,0	56.544,4	375.807,0	15,05%
UA	19,6	223,5	442,0	582,3		1.113,5	996,1	408,6	65.718,0	193,0	4.505,2		74.201,8	199.455,0	37,20%
BSEC Region Total Foreign Trade													314.335,6	1.768.745,1	17,77%

Table 5) Foreign Trade of the BSEC Countries in 2011(in million USD)
Source: National Statistics Institutes

The following table shows different foreign trade indicators of the BSEC region in the period 2007-2011, and percentage changes between periods. It is noteworthy that the foreign trade within BSEC countries has significantly increased comparing to 2010, which is also reflected in the total BSEC foreign trade. The growth is higher than comparing to the previous years.

	2007	% change to previous period	2008	% change to previous period	2009	% change to previous period	2010	% change to previous period	2011	% change to previous period
Foreign Trade Within BSEC	223,49	31,51	251,37	12,47	179,16	-28,73%	242,43	35,32%	314,33	30%
Total BSEC Foreign Trade	1.207,44	21,08	1.413,11	17,03	1.075,80	-23,87%	1.256,57	16,80%	1.768,75	40%
Within BSEC/Total BSEC	18,51%		17,79%		16,65%		19,29%		17,77%	

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

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 is presented below.

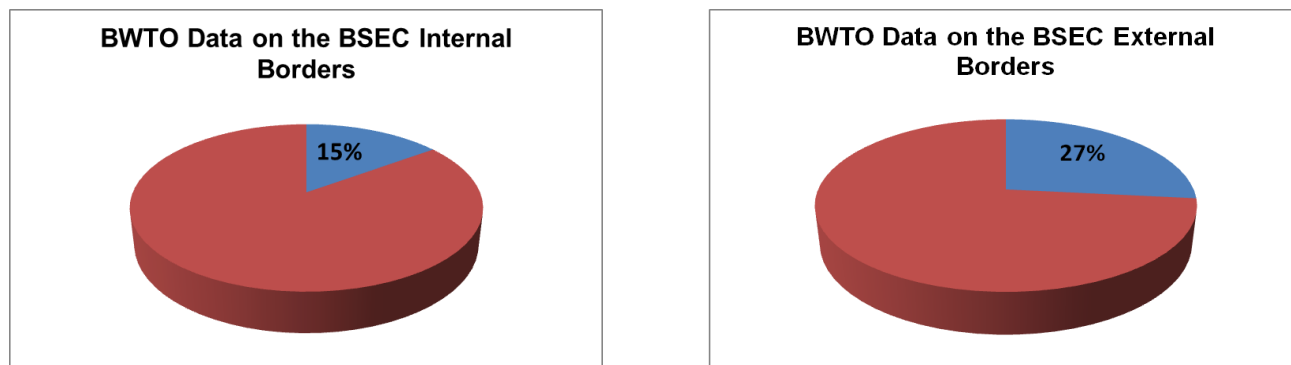


Fig. 4) BWTO Data on the BSEC Internal (3 out of 20) and External (8 out of 30) borders.

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 increased both at internal and external borders in 2011, with the average value of 292,4 minutes (see Fig.5).

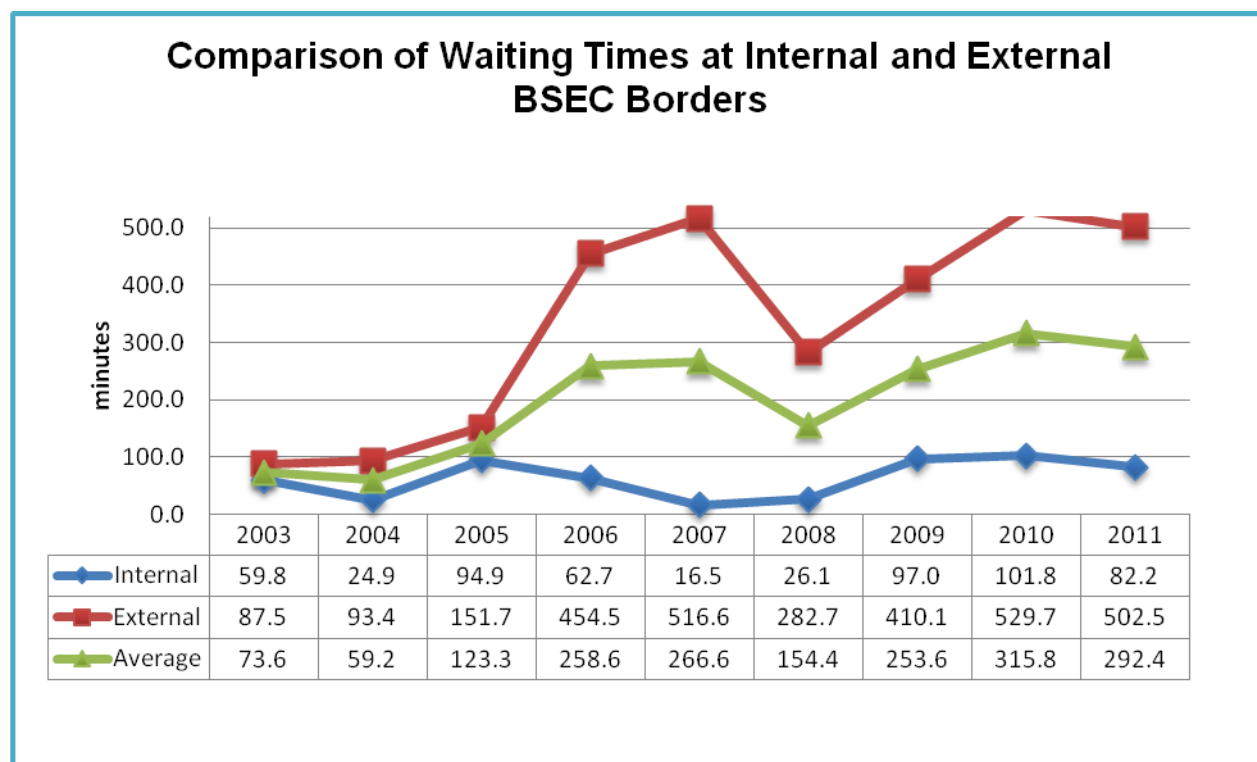


Fig. 5) Comparison of waiting times at Internal and External BSEC borders, and their average.

SITUATION AT BSEC INTERNAL BORDERS

	2005	2006	% 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 previous period	2011	% change to the previous period
BG-GR	141,6	120,0	-15,2%	0,0	-100,0%	0,0	0,0%	108,3					
BG-RO	30,4	28,7	-5,7%	0,3	-99,0%	21,0	7536,4%						
BG-SRB	269,9	115,3	-57,3%	18,0	-84,4%	38,0	111,1%	135,4	256,3%				
BG-TR	83,4	81,6	-2,2%	81,0	-0,8%	104,0	28,4%	121,2	16,6%	235,7	94,5%	210	-11%
RO-SRB	18,8	15,0	-20,0%	8,5	-43,3%	8,0	-5,9%			32,2			
RO-UA	25,5	15,9	-37,8%	4,0	-74,8%	1,8	-55,5%	60,0	3270,8%	90,9	51,5%	16	-82,4%
RO-MD				4,0		1,9	-53,3%			4,0			
RUS-UA						34,0		60,0	76,5%	146,3	143,9%	20,5	-86%
Average	94,9	62,7	-33,9%	16,5	-73,6%	26,1	57,7%	97,0	271,9%	101,8	5,0%	82,2	-19,2%

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.

In 2011, waiting times have significantly decreased.

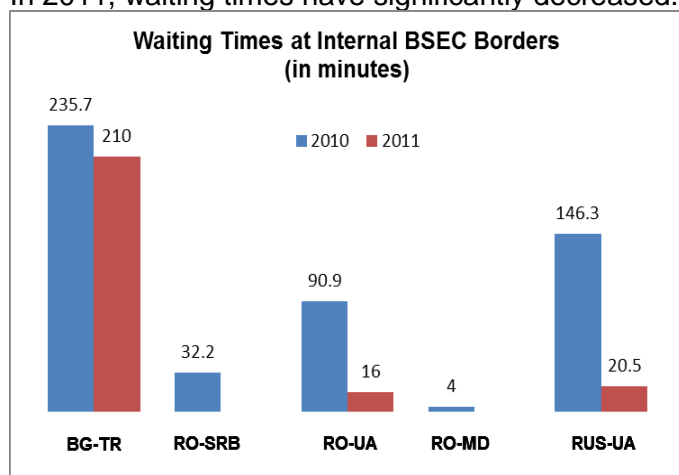


Fig. 6) Waiting times at Internal BSEC Borders

SITUATION AT BSEC EXTERNAL BORDERS

	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	2011			% change to the previous period
	average		average		average		average		in BSEC	out BSEC	average		in BSEC	out BSEC	average	
RUS-EST	1602,8	60,5%	2506,5	56,4%	1212,4	-51,6%	1791,8	47,8%	1520,4	2219,2	1869,8	4,3%	2020		2020	8%
UA-BY					60,0		55,2	-8,0%	-	-	-		5	27,3	16,1	
UA-PL	265,5	173,3%	382,1	43,9%	671,8	75,8%	174,5	-74,0%	271,5	114,8	193,1	10,7%	107,4	80,3	93,8	-51,4%
UA-HUN	355,0	759,4%	171,0	-51,8%	177,2	3,6%	95,9	-45,9%	87,8	4,3	46,0	-52,0%	162	241,3	201,6	338%
UA-SLO			600,0		269,1	-55,2%	180,7	-32,8%	179,8	199	189,4	4,8%	200	195	395	108%
RO-HUN	42,0	-38,9%	2,8	-93,4%	8,4	203,8%			-	-	-		-	-	-	
SRB-MKD			16,7		12,4	-25,5%			-	-	-		-	-	-	
GR-MKD			70,8		25,0	-64,6%			-	-	-		-	-	-	
BG-MKD	7,0	-81,9%	38,7	452,9%	35,2	-9,1%	93,5	165,9%	-	-	-		-	-	-	
SRB-HUN			15,2		9,8	-35,2%	25,6	160,4%	-	-	-		-	-	-	
RUS-FI			768,3		493,1	-35,8%	680,0	37,9%	-	-	-		-	-	-	
RUS-BY			93,8		80,5	-14,2%			-	-	-		-	-	-	
RUS-LT			584,8		421,7	-27,9%	468,6	11,1%	-	321,3	321,3	-31,4%		336	336	5%
RUS-LV			1758,8		394,9	-77,5%	615,3	55,8%	483,2	1104,3	793,7	29,0%	342,5	1363	853	7,5%
RUS-PL			223,4		369,2	65,3%	329,7	-10,7%	411,9	177,4	294,6	-10,6%		105	105	-64,3%
average	454,5	199,6%	516,64	13,7%	282,71	-45,3%	410,1	45,0%	492,4	591,5	529,7	30,0%	473	335,4	502,5	-5,1%

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

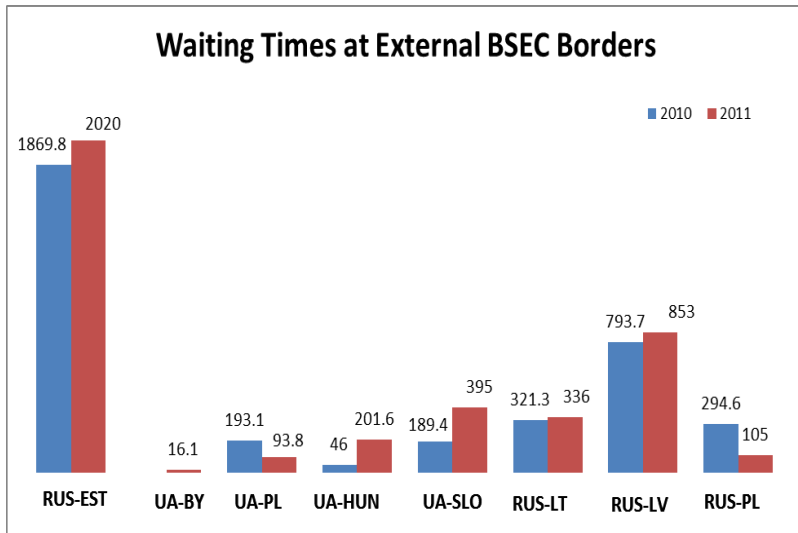


Figure 7) Waiting times at External BSEC Borders (in minutes)

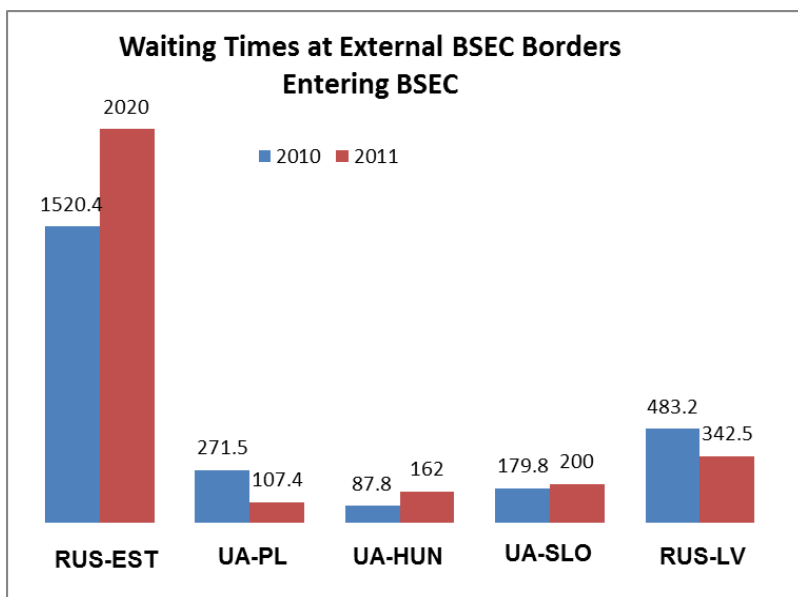


Fig. 8) Waiting times at External BSEC Borders - Entering BSEC

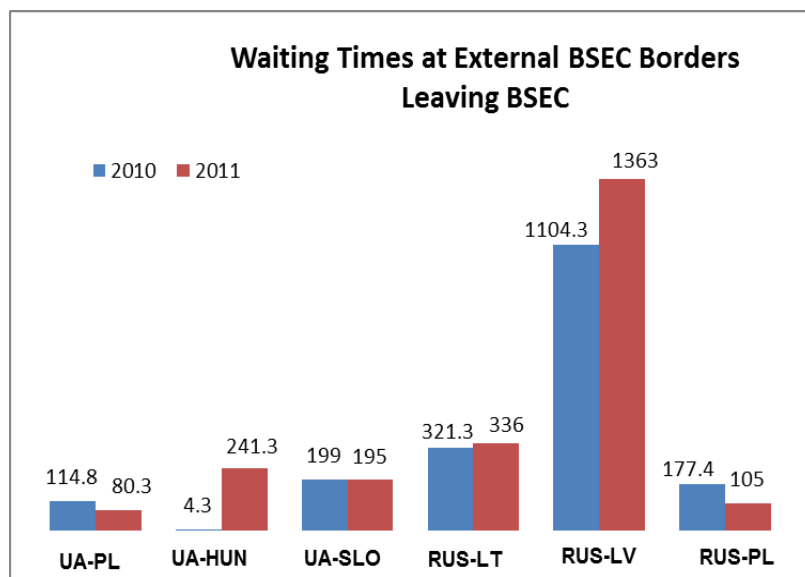


Fig. 9) Waiting times at External BSEC Borders – Leaving BSEC

Table 8 and Figures 7-9 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, 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 5% in 2011 to 502.5. The decrease is observed at internal BSEC borders as well by 19%.

Only at two borders situation observed to be improved while the rest five borders demonstrate an increase in waiting times.

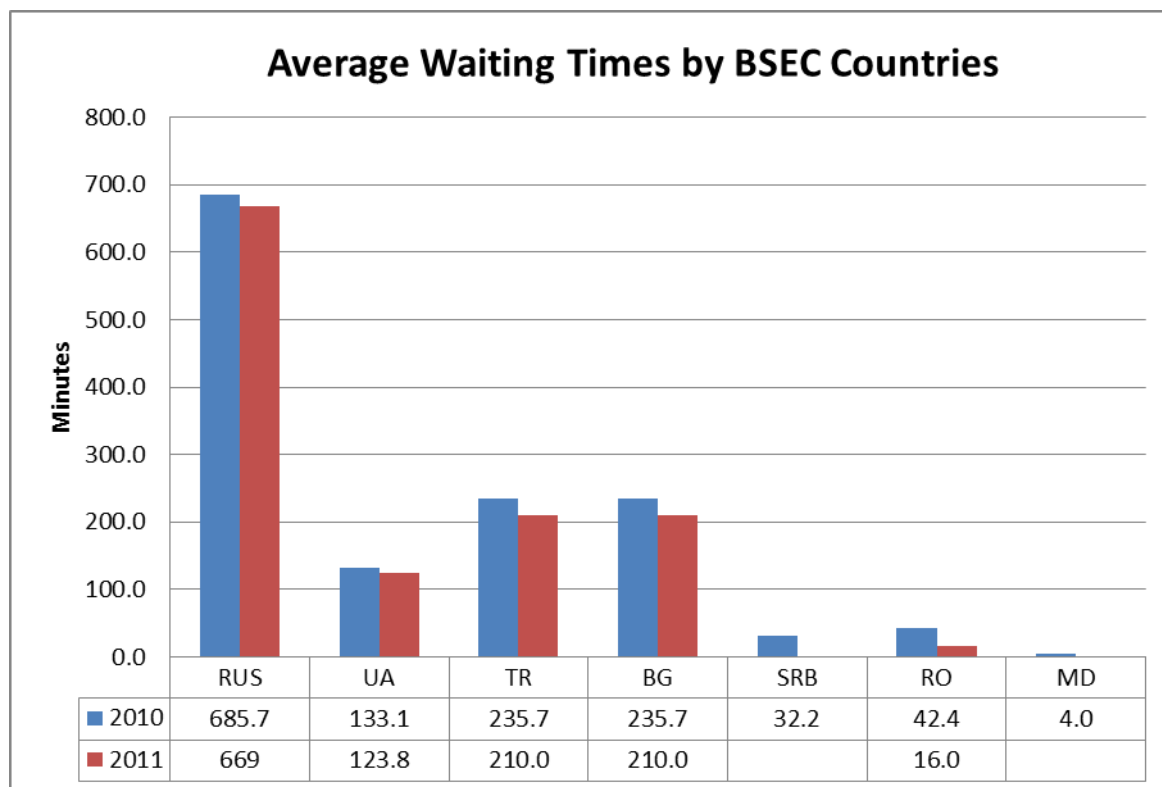


Fig. 10) Average waiting times by country.

Figure 10 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.

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	2011
BSEC Trade	100	139,9	175,9	220,3	289,7	325,8	232,3	314,2	407,4
Internal Waiting Times	100	41,7	158,8	104,8	27,6	43,6	162,3	170,3	137,5
Non-BSEC Trade	100	127,0	154,2	190,4	226,4	267,3	206,3	233,4	334,7
External Waiting Times	100	106,8	173,4	519,4	590,4	323,1	468,7	605,4	574,3
Total BSEC Trade	100	129,0	157,5	195,0	236,0	276,2	210,2	245,6	345,6
Average Waiting Times	100	80,4	167,5	351,1	362,0	210,0	344,4	429,0	397,1

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