

## 23<sup>rd</sup> MEETING OF THE BSEC-URTA GENERAL ASSEMBLY

Jumeirah Bilgah Beach Hotel  
Baku-Azerbaijan  
Thursday, 30 May 2013, at 09:00 hrs

### BSEC OUTLOOK 2012: 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 2012 in comparison with previous years.

#### I. INTERNATIONAL ROAD TRANSPORT INDUSTRY PERFORMANCE IN THE BSEC REGION IN THE YEAR 2012

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

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		40,578	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 1) Road transport operations in BSEC region in 2011

2012	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SRB	TR	UA	BSEC	EU24	Others	Total
AL			3	572		58,100	71	220	4	350	2168	125	61,613	35,140	38	96,791
AM				10	1,570	6	5	11	3,720			360	5,682	18	5	5,705
AZ				30	1,500		100	100	6,000		500	1,500	9,730	1,000	296	11,026
BG	370		200		335	129,845	885	81,680	8,390	5,465	69,190	2,280	298,640	125,550	20,995	445,185
GE		3,755	5,300	537		423	18	31	33	5	7,465	4,929	22,496	8,321	511	31,328
GR																
MD	14	37	150	483	384	168		470	22,731	114	914	591	26,056	3,928	555	30,539
RO	150	153	48	13,600	198	8,350	3,550		7,300	4,300	10,800	12,400	60,849	40,200	3,801	104,850
RU																
SRB	711		72	14,120	85	14,218	163	22,310	7,538		7,345	11,547	78,109	126,999	81,311	286,419
TR	3,672	43	24,271	12,244	73,418	15,329	1,558	28,845	11,304	3,748		5,243	179,675	248,308	762,090	1,190,073
UA		1,413	3,421	10,766	4,932	2,399	25,781	17,463	39,471	1,878	13,021		120,545	462,394	58,279	641,218

Table 2) Road transport operations in BSEC region in 2012

Figures 1 and 2, shows the total international trips in the BSEC region in 2011 and 2012. Three categories: trips within the BSEC region, trips to the EU24 (EU countries except GR, RUS) and trips to the rest of the world. Share of operations to destinations other than to BSEC and EU24 has decreased by 3% comparing to the last year, while operations within BSEC has increased from 26% to 30% and 1% decline in operations to the EU24.

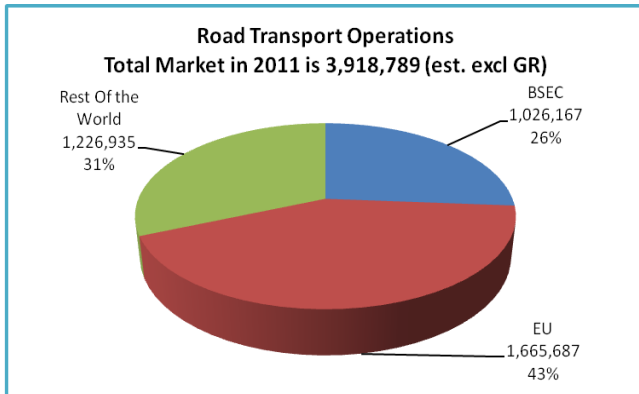


Fig.1) International road transport trips by the BSEC hauliers in 2011

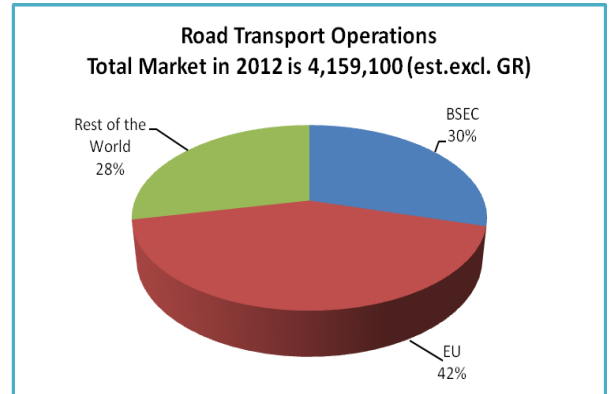


Fig.2) International road transport trips by the BSEC hauliers in 2012

Figure 3 shows the share between BSEC Countries in the whole international road transport market of the BSEC Region according to data for the 2012. Since there were no data provided for, GR, RUS these countries are not included in the chart.

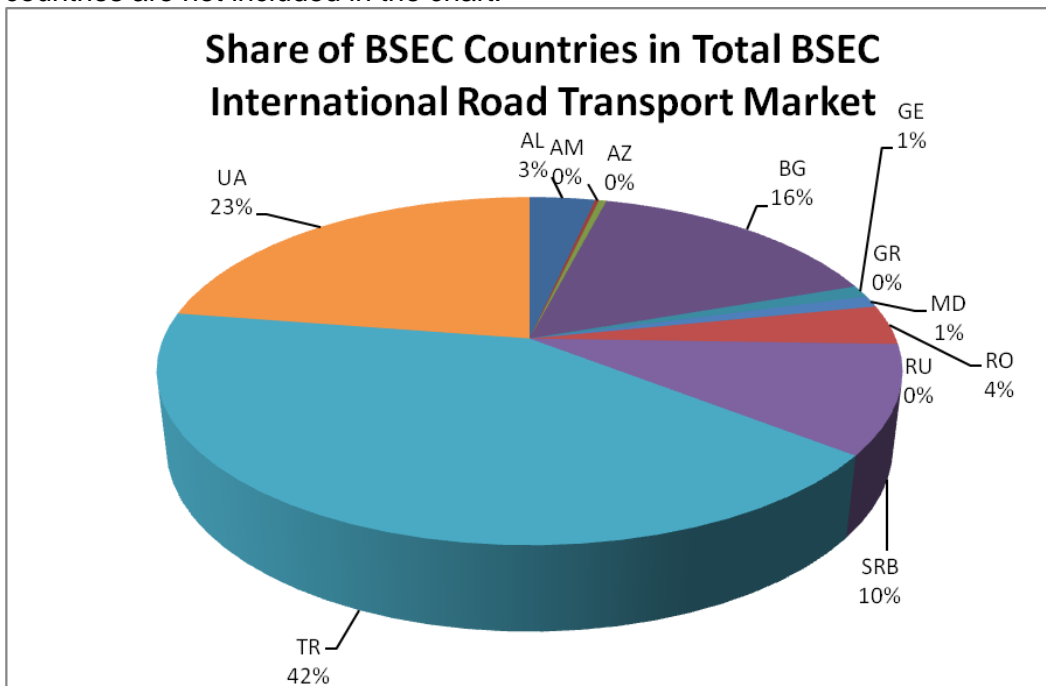


Fig.3) Share of BSEC Countries in the whole BSEC International Road Transport Market in 2012.

Table 3 shows the comparison of the situation at the BSEC International Road Transport Market in 2007-2012. Total number of trips has increased by 6.13% comparing to 2011, from which it is observed a downfall of 4,14% in the trips to the rest of the world. We can observe increase in the trips within BSEC region by 19.17% and 5.67% increase in the trips to the EU.

	2007	2008	2009 (upd.)	% change to the previous period	2010	% change to the previous period	2011	% change to the previous period	2012(*)	% change to the previous period
<b>Total number of trips</b>	2,602,545	3,028,321	2,825,029	-6,71	3,719,998	31,7%	3,918,789	5,34%	4,159,100	6.13
<b>Trips within BSEC</b>	728.712	814.583	733.008	-10,01	736.673	0,49%	1,026,167	39,30%	1,222,848	19.17
<b>Trips to EU</b>	1,222,228	1,621,897	1,283,773	-20,85	1,630,391	27,0%	1,665,687	2,16%	1,760,060	5.67
<b>Trips to Rest of the World</b>	651,605	591,842	808,248	36,56	1,357,856	68,0%	1,226,935	-9,64%	1,176,192	-4.14
<b>BSEC Trips/Total Trips, %</b>	28,7%	26,9%	25,9%		19,8%		26,1%		29,40%	

Table 3) Comparative table of the BSEC International Road Transport Market in 2007-2012.

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

## 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 2011 and in 2012 is presented in the tables below.

2011	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SRB	TR	UA	Total with BSEC	Total with World	BSEC /World %
AL				90		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	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	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%
<b>BSEC Region Total Foreign Trade</b>													<b>314,335.6</b>	<b>1,768,745.1</b>	<b>17.77%</b>

Table 4) Foreign Trade of the BSEC Countries in 2011 (in million USD)  
Source: National Statistics Institutes

2012	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SRB	TR	UA	Total with BSEC	Total with World	BSEC /World %
AL				90.4		560.6		59.7					710.7	6,965.4	10.20%
AM				215.8	130.6	29.0		88.6	1,339.2		214.5	230.5	2,248.2	5,695.0	39.48%
AZ	0.0			623.5	700.7	849.0	9.0	83.6	2,338.2	22.4	2,120.4	625.3	7,372.1	33,561.0	21.97%
BG	89.0	26.0	37.8		588.2	3,901.7	118.0	4,285.7	7,533.7	889.1	4,039.1	1,139.0	22,647.3	59,475.3	38.08%
GE	0.3	331.4	1,260.4	341.1		53.0	21.5	262.5	519.6	2.0	1,535.7	764.1	5,091.6	10,219.6	49.82%
GR	649.0	11.6	648.8	3,517.1	135.0		57.4	1,318.2	8,264.6	465.0	5,177.8	432.3	20,676.8	96,065.1	21.52%
MD	0.2	1.8	5.8	112.0	20.4	63.3		977.3	1,471.9	16.2	444.3	716.7	3,829.9	7,374.8	51.93%
RO	60.1	8.0	111.6	4,199.0	330.1		1,235.1		4,416.5	1,234.4	5,513.4	1,716.4	18,824.6	128,045.0	14.70%
RU		1,216.1	3,407.8	5,039.0	439.2	6,575.5	2,085.3	3,610.4			34,217.5	45,146.5	101,737.3	837,294.9	12.15%
SRB				791.6		470.0		1,761.3	2,945.7		626.2	305.0	6,899.8	30,366.9	22.72%
TR	355.0	462.6	2,927.8	4,436.6	1,434.4	4,942.4	360.0	5,733.6	33,302.8	586.6		6,223.4	60,178.6	389,097.0	15.47%
UA	55.6	202.2	846.4	849.3	718.0	401.1	945.0	1,481.3	45,050.0	252.0	5,637.0		56,437.9	153,467.9	36.78%
<b>BSEC Region Total Foreign Trade</b>													<b>306,654.8</b>	<b>1,757,627.9</b>	<b>17.45%</b>

Table 5) Foreign Trade of the BSEC Countries in 2012(in million USD)  
Source: National Statistics Institutes

The following table shows different foreign trade indicators of the BSEC region in the period 2007-2012, and percentage changes between periods. We can observe that there is a slight decrease in the foreign trade within BSEC countries and this decrease is observed in the total BSEC foreign trade, as well, which explains the reason of decrease of the trips to the rest of the world by 4.14 %.

	2007	2008	2009	% change to previous period	2010	% change to previous period	2011	% change to previous period	2012	% change to previous period
Foreign Trade Within BSEC	223.49	251.37	179.16	-28.73%	242.43	35.32%	314,33	30%	306,65	-2.44%
Total BSEC Foreign Trade	1,207.44	1,413.11	1,075.80	-23.87%	1,256.57	16.80%	1,768.75	40%	1,757.63	-0.6%
Within BSEC/Total BSEC	18.51%	17.79%	16.65%		19.29%		17.77%		17.45%	

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 2012 is presented below.

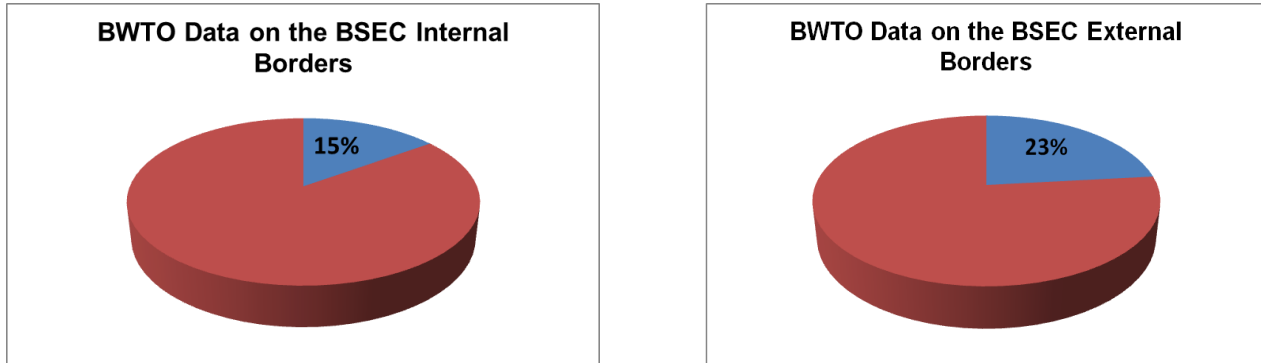


Fig. 4) BWTO Data on the BSEC Internal (3 out of 20) and External (7 out of 30) borders.

The data coverage of BSEC external borders have decreased, while the data coverage of BSEC internal borders in 2012 remained the same illustrated in Fig.4.

In average, waiting times at BSEC borders have increased in the internal borders, while it decreased in the external border with the average value of 246,0 minutes (see Fig.5).

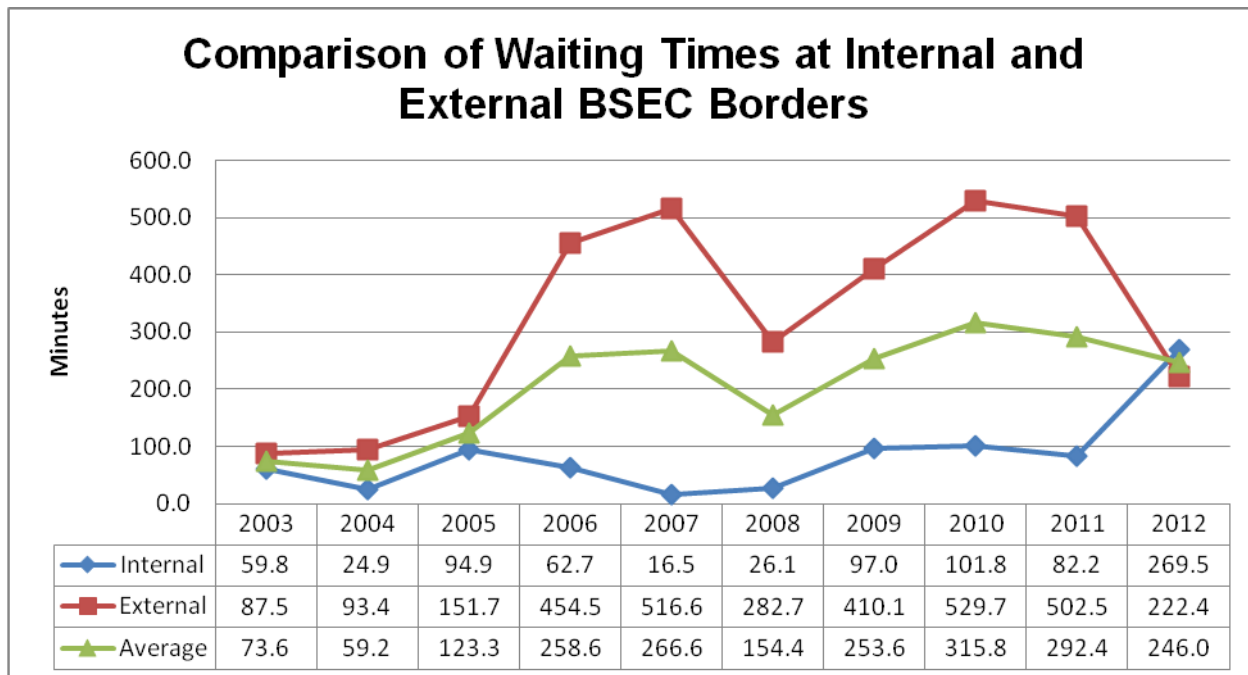


Fig. 5) Comparison of waiting times at Internal and External BSEC borders, and their average.

## SITUATION AT BSEC INTERNAL BORDERS

	2005	2006	2007	2008	% change to the prev. period	2009	% change to the prev. period	2010	% change to the previous period	2011	% change to the previous period	2012	% change to the previous period
BG-GR	141,6	120,0	0,0	0,0	0,0%	108,3							
BG-RO	30,4	28,7	0,3	21,0	7536,4%								
BG-SRB	269,9	115,3	18,0	38,0	111,1%	135,4	256,3%						
BG-TR	83,4	81,6	81,0	104,0	28,4%	121,2	16,6%	235,7	94,5%	210	-11%		
RO-SRB	18,8	15,0	8,5	8,0	-5,9%			32,2				776,7	
RO-UA	25,5	15,9	4,0	1,8	-55,5%	60,0	3270,8%	90,9	51,5%	16	-82,4%	15,1	-45%
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%	16,8	-18%
<b>Average</b>	<b>94,9</b>	<b>62,7</b>	<b>16,5</b>	<b>26,1</b>	<b>57,7%</b>	<b>97,0</b>	<b>271,9%</b>	<b>101,8</b>	<b>5,0%</b>	<b>82,2</b>	<b>-19,2%</b>	<b>269,5</b>	<b>228 %</b>

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,SRB and TR and for Romanian border with MD in 2012.

In 2012, slight decrease is seen in waiting times between RO-UA and RUS-UA, whereas there is huge increase between RO-SRB borders comparing to the previous years.

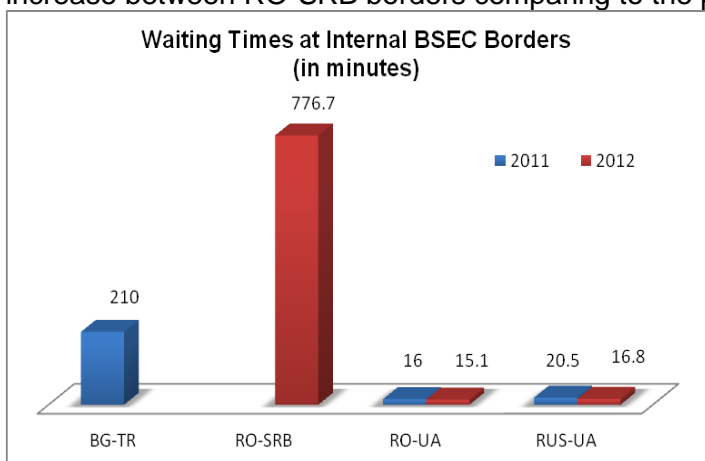


Fig. 6) Waiting times at Internal BSEC Borders

## SITUATION AT BSEC EXTERNAL BORDERS

	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	2012			% change to the previous period
	average		average		average		average		in BSEC	out BSEC	average		in BSEC	out BSEC	average	average
RUS-EST	2506,5	56,4%	1212,4	-51,6%	1791,8	47,8%	1869,8	4,3%	2020		2020	8%	-	-	-	-
UA-BY			60,0		55,2	-8,0%	-		5	27,3	16,1		-	-	-	-
UA-PL	382,1	43,9%	671,8	75,8%	174,5	-74,0%	193,1	10,7%	107,4	80,3	93,8	-51,4%	157,8	59,2	108,5	15,7 %
UA-HUN	171,0	-51,8%	177,2	3,6%	95,9	-45,9%	46,0	-52,0%	162	241,3	201,6	338%	147,3	139,7	143,5	-28,8%
UA-SLO	600,0		269,1	-55,2%	180,7	-32,8%	189,4	4,8%	200	195	395	108%	74,4	121,5	98	-75,2%
RO-HUN	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	38,7	452,9%	35,2	-9,1%	93,5	165,9%			-	-	-		-	-	-	-
SRB-HUN	15,2		9,8	-35,2%	25,6	160,4%			-	-	-		4,6	26,3	15,5	-
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	-31,4%		336	336	5%		221	221	-34,2%
RUS-LV	1758,8		394,9	-77,5%	615,3	55,8%	793,7	29,0%	342,5	1363	853	7,5%	390,2	596,7	493,5	-42,1%
RUS-PL	223,4		369,2	65,3%	329,7	-10,7%	294,6	-10,6%		105	105	-64,3%		270	270	157%
<b>average</b>	<b>516,64</b>	<b>13,7%</b>	<b>282,71</b>	<b>-45,3%</b>	<b>410,1</b>	<b>45,0%</b>	<b>529,7</b>	<b>30,0%</b>	<b>473</b>	<b>335,4</b>	<b>502,5</b>	<b>-5,1%</b>	<b>155</b>	<b>205</b>	<b>222,4</b>	<b>-55,7%</b>

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

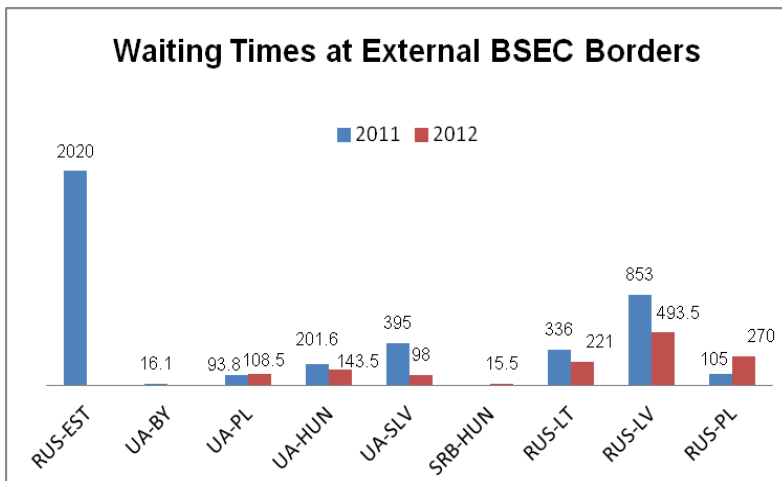


Figure 7) Waiting times at External BSEC Borders (in minutes)

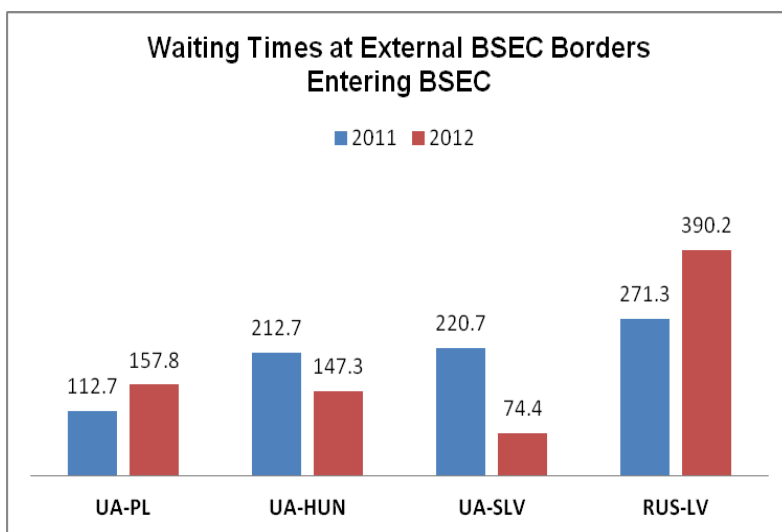


Fig. 8) Waiting times at External BSEC Borders - Entering BSEC

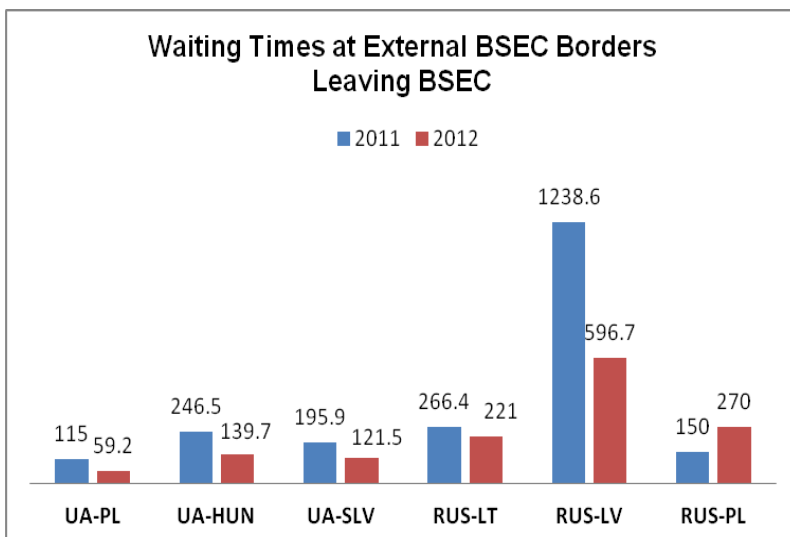


Fig. 9) Waiting times at External BSEC Borders – Leaving BSEC

Table 8 and Figures 7-9 illustrate the situation at external BSEC borders. There were no available data for RUS-EST, UA-BY, RO-HUN, SRB-MKD, GR-MKD, BG-MKD, RUS-FI and RUS-BY borders in 2012, despite the data was added for SRB-HUN, there is seen decrease in the BWTO coverage of external BSEC borders up to 23,0 %.

Average waiting time at external BSEC borders in 2011 was 502,5 minutes, which decreased by 55,7% in 2012 to 222,4

The significant decrease is observed at internal BSEC borders by 67,2%. In the external border there is also seen a significant decrease between RUS-LV by 42,1 %.

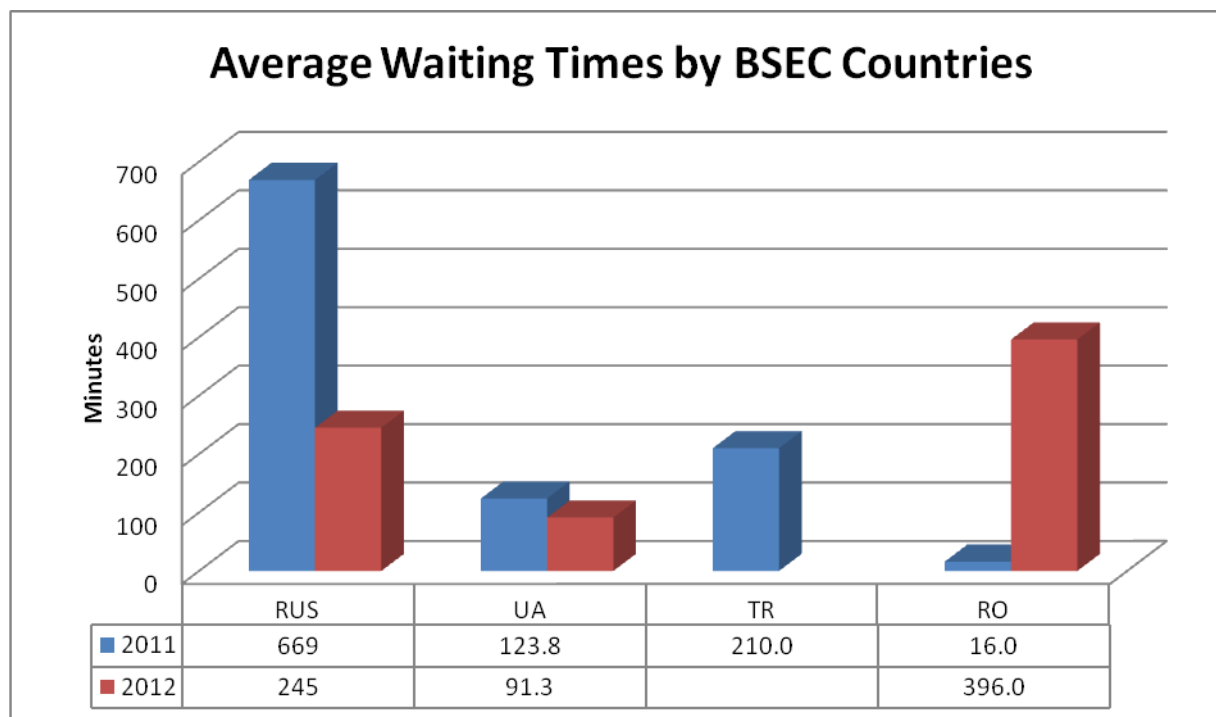


Fig. 10) Average waiting times by country.

Figure 10 shows the average waiting times at borders by country for 4 BSEC countries, whose borders are covered, partially, in the BWTO database, as of 2011 and 2012.

#### 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	2012
<b>BSEC Trade</b>	100	139,9	175,9	220,3	289,7	325,8	232,3	314,2	407,4	397,5
<b>Internal Waiting Times</b>	100	41,7	158,8	104,8	27,6	43,6	162,3	170,3	137,5	451,0
<b>Non-BSEC Trade</b>	100	127,0	154,2	190,4	226,4	267,3	206,3	233,4	334,7	334,0
<b>External Waiting Times</b>	100	106,8	173,4	519,4	590,4	323,1	468,7	605,4	574,3	254,1
<b>Total BSEC Trade</b>	100	129,0	157,5	195,0	236,0	276,2	210,2	245,6	345,6	343,5
<b>Average Waiting Times</b>	100	80,4	167,5	351,1	362,0	210,0	344,4	429,0	397,1	334,1

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