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Istanbul, 10 October 2013

24th MEETING OF THE BSEC-URTA GENERAL ASSEMBLY

Radisson Blu Iveria Hotel
Tbilisi-Georgia
Friday, 25 October 2013, at 09:00 hrs

BSEC OUTLOOK 2013-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 year 2012-I in comparison with 2013-I.

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

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

2012-I	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SRB	TR	UA	BSEC	EU24	Others	Total
AL				300		33,123	45	120	4	173	1,005	2	34,772	22,340	16	57,128
AM				7	750	4	2	7	1,800			160	2,730	13	2	2,745
AZ				10	800		20	20	3,000		50	500	4,400	515	500	5,415
BG*			400			58,880		50,860	5,945	5,465	42,045	1,560	165,155	56,680	7,740	229,575
GE		2,912	3,224	512		311	35	290	25		3,819	1,615	12,743			12,743
GR																
MD	6	42	132	420	396	170		552	18,724	90	960	756	22,248	4,238	2,868	29,354
RO	24	58	98		214				2,908	4,172		8,120	15,594			15,594
RU																
SRB	258		18	4,762	19	4,485	50	8,178	3,107		2,254	5,543	28,674	54,622	36,612	119,908
TR	1,678	20	14,158	6,016	32,858	7,287	755	15,095	4,652	1,897		1,940	86,356	115,747	369,822	571,925
UA		680	3,300	6,377	2,440	1,012	12,000	11,947	20,235	1,007	8,085		67,083	226,788	78,154	372,025

Table 1) Road transport operations in BSEC region in 2012-I

2013-I	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SRB	TR	UA	BSEC	EU24	Others	Total
AL			271	451		27,635		85		154	544	203	29,343	17,532	9	46,884
AM				4	850	2	4	4	2,150			230	3,244	11	10	3,265
AZ				100	800		100	50	4,000		200	500	5,750	50	34	5,834
BG*						98,205	390	44,975	1,500	5,075	28,780		178,925	76,910	16,425	272,260
GE		1,345	6,330	46		276	31	34	48		5,780	1,665	15,555	3,123	87	18,765
GR																
MD	2	10	72	208	547	59		173	8,238	36	803	112	10,260	1,633	152	12,045
RO																
RU																
SRB																
TR	1,851	33	14,925	6,382	31,629	7,284	862	12,817	6,563	2,326		2,457	87,129	123,252	486,980	697,361
UA		1,112	3,234	6,184	3,214	1,087	12,642	12,372	23,271	1,237	9,712		74,065	264,789	39,832	378,686

Table 2) Road transport operations in BSEC region in 2013-I

Figures 1 and 2, shows the total international trips in the BSEC region in 2012-I and 2013-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. It is observed that in 2013-I the total road transport operations increased from 1,989,519 to 2,144,274. In 2013-I compared with 2012-I the share of operations within BSEC remained the same, while the share of EU operations have decreased by 1% and to other destinations we observe 1% increase.

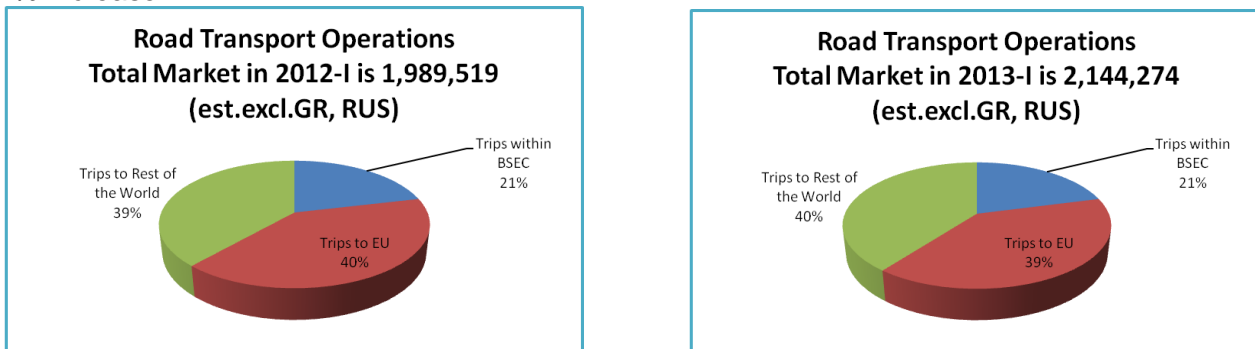


Fig.1) International road transport trips by the BSEC hauliers in 2012-I Fig.2) International road transport trips by the BSEC hauliers in 2013-I

Figure 3 shows the share between BSEC Countries in the whole international road transport market of the BSEC Region according to data for the 2013-I. Since there were no data provided for, GR, RUS, SRB and RO these countries are not included in the chart.

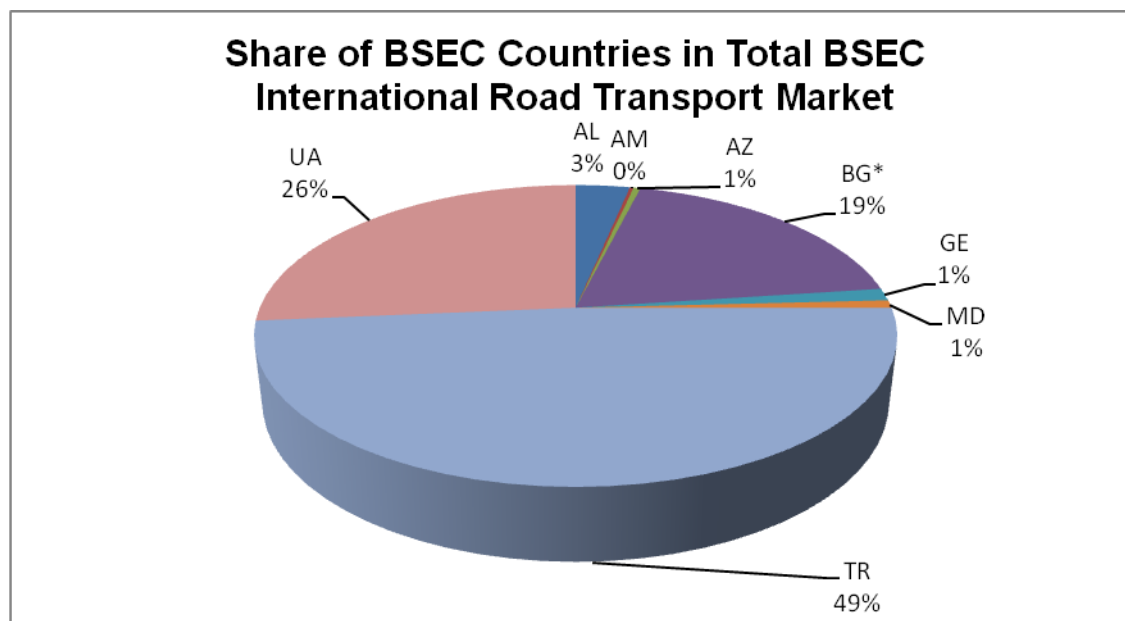


Fig.3) Share of BSEC Countries in the whole BSEC International Road Transport Market in 2013-I.

Table 3 shows the comparison of the situation at the BSEC International Road Transport Market in 2007-2013-I. Total number of trips has increased by 7.7% comparing to 2012-I, from which it is observed an increase of 2.0 % within the BSEC and the trips to EU24, and 7,0% increase in the trips to the rest of the world.

	2007	2008	2009 (upd.)	2010	2011-I(*)	% change to the previous period	2012-I(*)	% change to the previous period	2013-I(*)	% change to the previous period
Total number of trips	2,602,545	3,028,321	2,825,029	3,719,998	1,955,310	0,79%	1,989,519	1,75%	2,144,274	7,7%
Trips within BSEC	728,712	814,583	733,008	736,673	426,030	9,52%	439,731	3,22%	448,525	2,0%
Trips to EU24	1,222,228	1,621,897	1,283,773	1,630,391	805,397	-5,3%	830,257	3,09%	846,862	2,0%
Trips to Rest of the World	651,605	591,842	808,248	1,357,856	723,883	3,31%	793,353	9,60%	848,887	7,0%
BSEC Trips/Total Trips, %	28,7%	26,9%	25,9%	19,8%	21,8 %		22,1%		21,4%	

Table 3) Comparative table of the BSEC International Road Transport Market in 2007-2013.

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

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 2012-I and in 2013-I is presented in the tables below.

2012-I	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SRB	TR	UA	Total with BSEC	Total with World	BSEC /World %
AL				43.0		294.3		30.0	46.5		190.4		604.2	3,283.1	18.40%
AM				102.0	57.1	17.0		42.3	613.0		92.7	104.0	1,028.1	2,702.1	38.05%
AZ				426.2	347.4	320.3	2.2	43.5	1,035.5	16.3	1,025.1	314.0	3,530.5	17,171.8	20.56%
BG	57.0	7.2	26.3		290.2	2,487.0	41.5	2,803.7	4,585.6	582.5	2,506.0	812.6	14,199.6	40,512.2	35.05%
GE	0.2	140.0	605.8	170.2		23.0	7.6	115.0	214.5	0.5	741.2	341.0	2,359.0	4,865.9	48.48%
GR	597.0	3.5	56.5	243.1	17.1		20.0	865.5	4,006.5	270.2	2,401.2	206.2	8,686.8	61,322.0	14.17%
MD		1.0	2.2	47.8	9.4	30.0		464.0	718.0	6.6	212.0	331.0	1,822.0	3,502.3	52.02%
RO	44.0	1.7	365.0	285.0	206.2	784.5	753.7		2,660.7	950.0	3,989.2	1,244.7	11,284.7	94,931.3	11.89%
RU		556.1	1,374.5	2,241.6	195.1	2,993.6	999.6	1,718.6			16,639.9	22,342.4	49,061.4	406,834.5	12.06%
SRB				393.4		231.4		907.7	1,505.3		323.3	211.2	3,572.3	14,735.9	24.24%
TR	200.4		1,975.2	2,750.5	844.7	3,382.8	305.0	4,510.5	26,445.5	359.5		5,292.1	46,066.2	191,535.9	24.05%
UA	34.2	84.3	377.3	418.0		168.2	416.6	726.1	22,376.0	140.0	2,761.1		27,501.8	74,571.6	36.88%
BSEC Region Total Foreign Trade													169,716.6	915,968.6	18.53%

Table 4) Foreign Trade of the BSEC Countries in 2012-I (in million USD)
Source: National Statistics Institutes

2013-I	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SRB	TR	UA	Total with BSEC	Total with World	BSEC /World %
AL				67.4		347.0		33.6	54.9	91.5	234.2		828.6	4,670.0	17.74%
AM				104.0	69.8	13.4		51.2	597.0		90.1	103.2	1,028.7	2,671.2	38.51%
AZ	0.0			128.0	326.0	380.5	2.6	93.0	1,382.5	27.3	984.0	331.0	3,654.9	17,144.5	21.32%
BG	44.9	14.7	20.8		280.7	1,899.2	59.6	2,143.2	3,527.1	400.0	2,367.9	579.4	11,337.5	30,696.2	36.93%
GE	0.1	191.1	606.0	145.2		34.5	11.3	139.0	277.5	0.7	693.0	341.7	2,440.1	4,713.3	51.77%
GR	263.0	6.4	474.5	1,829.1	131.4		25.2	694.7	4,339.8	244.5	2,754.8	161.0	10,924.4	49,083.7	22.26%
MD	0.1	0.5	3.0	59.0	14.4	36.6		501.7	710.0	7.5	276.0	372.1	1,980.9	3,716.0	53.31%
RO	26.0	3.3	62.2	2,070.0	168.0	741.0	601.4		2,225.5	474.0	3,007.5	780.0	10,158.9	66,167.1	15.35%
RU		600.5	1,878.7	1,682.2	218.8	2,886.4	768.3	1,629.0			15,633.8	17,824.7	43,122.4	404,620.2	10.66%
SRB				423.6		301.0		783.2	1,547.4		318.7	125.0	3,498.9	19,647.6	17.81%
TR	158.0	0.2	1,574.4	2,367.8	649.0	2,679.2	269.0	3,140.7	15,113.7	216.3		3,317.0	29,485.3	201,006.3	14.67%
UA	21.5	89.2	480.3	395.6	312.8	206.0	463.0	583.2	17,196.6	120.7	2,739.3		22,608.2	65,706.0	34.41%
BSEC Region Total Foreign Trade													141,068.8	869,842.1	16.22%

Table 5) Foreign Trade of the BSEC Countries in 2013-I (in million USD)
Source: National Statistics Institutes

The following table shows different foreign trade indicators of the BSEC region in the period 2007-2013, and percentage changes between periods. We can observe downfall in the volume of trade within BSEC Region and slight decrease is seen in the total BSEC foreign trade by 5,03%.

	2007	2008	2009	2010	2011-I	2012-I	% change to previous period	2013-I	% change to previous period
Foreign Trade Within BSEC	223,49	251,37	179,16	242,43	149,89	169,72	13,2%	141,06	-16,88%
Total BSEC Foreign Trade	1.207,44	1.413,11	1.075,80	1.256,57	829,62	915,97	10,4%	869,84	-5,03%
Within BSEC/Total BSEC	18,51%	17,79%	16,65%	19,29%	18,07%	18,53%		16,22%	

Table 6) Foreign trade of the BSEC region in 2007-2013-I.

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 2013-I is presented below.

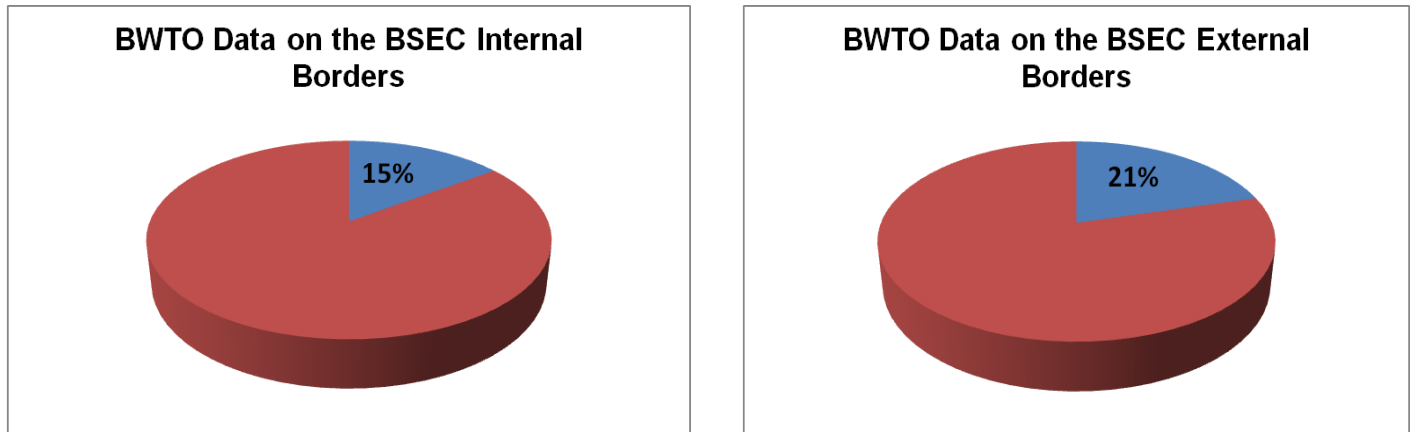


Fig. 4) BWTO Data on the BSEC Internal (3 out of 20) and External (6 out of 30) borders.

The data coverage of BSEC internal borders in 2013-I have increased, while the data coverage of BSEC external borders in 2013-I have decreased to percentages illustrated in in Fig.4.

In average, waiting times at BSEC borders have decreased almost to the half value in 2013-I, with the average value of 58,4 minutes. We observe slight increase in the average waiting times at internal border; while the situation has improved in the BSEC external borders (see Fig.5).

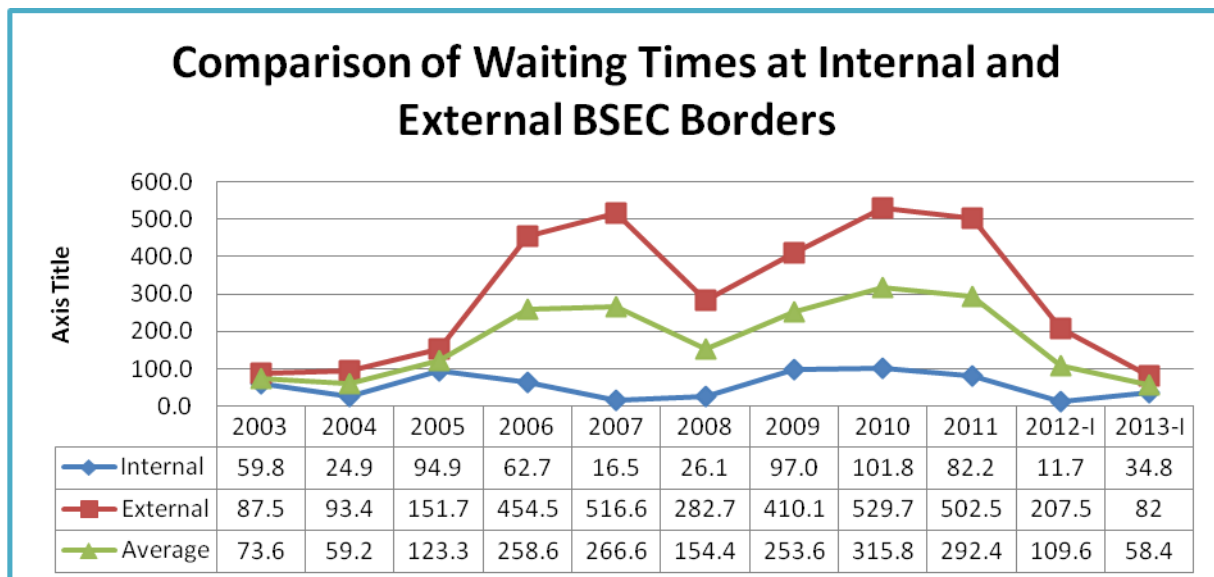


Fig. 5) Comparison of waiting times at Internal and External BSEC borders, and their average.

SITUATION AT BSEC INTERNAL BORDERS

	2006	2007	2008	2009	% change to the prev. period	2010	% change to the previous period	2011-I	% change to the previous period	2012-I	% change to the previous period	2013-I	% change to the previous period
BG-GR	120,0	0,0	0,0	108,3									
BG-RO	28,7	0,3	21,0										
BG-SRB	115,3	18,0	38,0	135,4	256,3%								
BG-TR	81,6	81,0	104,0	121,2	16,6%	235,7	94,5%	211,7	-10,2%				
RO-SRB	15,0	8,5	8,0			32,2						13,0	
RO-UA	15,9	4,0	1,8	60,0	3270,8%	90,9	51,5%	10,2	-89%	9	-12,0%	36,3	303,3 %
RO-MD		4,0	1,9			4,0							
RUS-UA			34,0	60,0	76,5%	146,3	143,9%	12,7	-91,3%	14,4	13,4%	55,2	283,3%
Average	62,7	16,5	26,1	97,0	271,9%	101,8	5,0%	78,2	-23,2%	11,7	-85,0%	34,8	197,4%

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 2013-I.

In 2013-I, we observe significant increase in waiting times between RO-UA and RUS-UA. While we did not have available data for RO-SRB for the past 2 years, from the data given in 2013-I we see almost 60% decrease in waiting times comparing to the last given data in 2010.

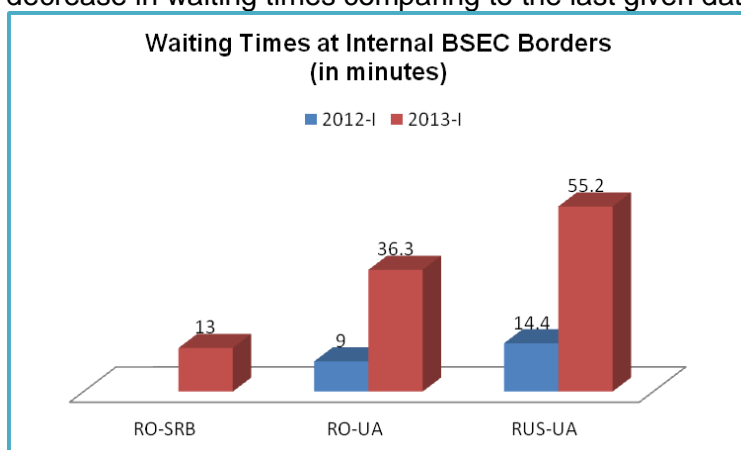


Fig. 6) Waiting times at Internal BSEC Borders

SITUATION AT BSEC EXTERNAL BORDERS

	2008	2009	2010	2011-I			% change to the previous period	2012-I			% change to the previous period	2013-I			% change to the previous period
	average	average	average	in BSEC	out BSEC	average		in BSEC	out BSEC	average		in BSEC	out BSEC	average	
RUS-EST	1212,4	1791,8	1869,8		1815,4	1815,4	-2,91%	-	-	-					
UA-BY	60,0	55,2	-	5	27,3	16,2		-	-	-					
UA-PL	671,8	174,5	193,1	112,7	115	113,9	-41%	133	70,5	101,7	-10,7%	313,7	105,3	209,5	105,9%
UA-HUN	177,2	95,9	46,0	212,7	246,5	229,6	400%	126,3	150,0	138,1	-40,0%	122,0	55,3	88,6	-36,0%
UA-SLV	269,1	180,7	189,4	220,7	195,9	208,3	10%	57,6	86,3	72,0	-65,4%	7	22,6	14,8	-79,4%
RO-HUN	8,4		-	-	-	-		-	-	-					
SRB-MKD	12,4		-	-	-	-		-	-	-					
GR-MKD	25,0		-	-	-	-		-	-	-					
BG-MKD	35,2	93,5	-	-	-	-		-	-	-					
SRB-HUN	9,8	25,6	-	-	-	-		3,7	13,0	8,3		6,5	9,3	7,9	-4,5%
RUS-FI	493,1	680,0	-	-	-	-		-	-	-					
RUS-BY	80,5		-	-	-	-		-	-	-					
RUS-LT	421,7	468,6	321,3		266,4	266,4	-17%		230,3	230,3	-13,5%		15,0	15,0	-93,4%
RUS-LV	394,9	615,3	793,7	271,3	1238,6	754,9	-4,9%	324,3	520,4	422,3	55%	177,0	135,0	156,0	-63,0%
RUS-PL	369,2	329,7	294,6		150	150	-49,1%		480,0	480,0	220%				
average	282,71	410,1	529,7	164,5	506,9	444,3	-16,1%	129,0	221,5	207,5	-53,3%	125,2	57,1	82,0	-60,0%

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

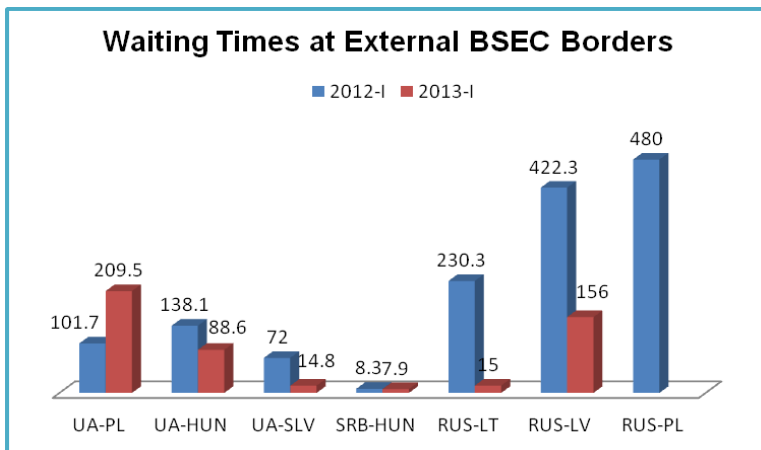


Figure 7) Waiting times at External BSEC Borders (in minutes)

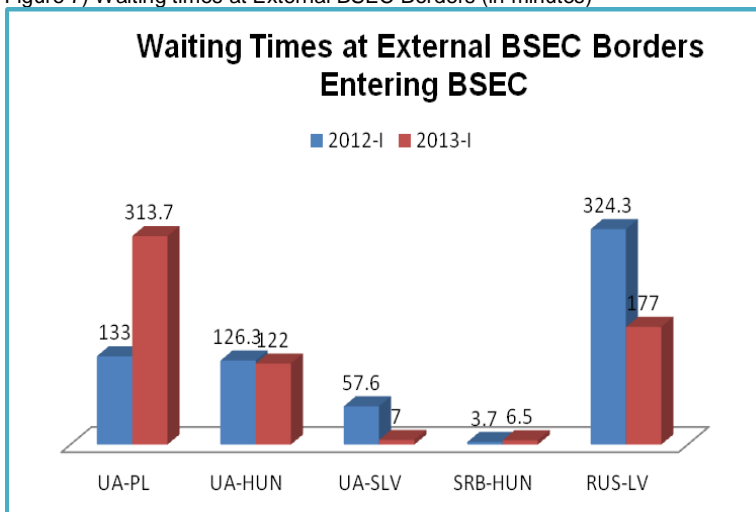


Fig. 8) Waiting times at External BSEC Borders (in minutes)

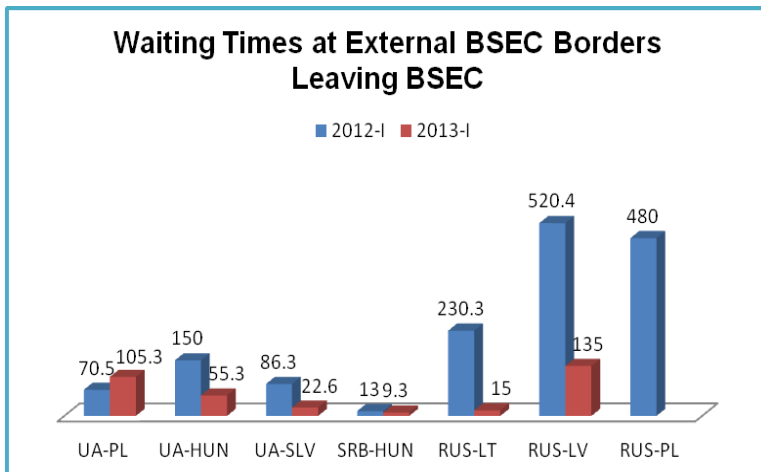


Fig. 9) Waiting times at External BSEC Borders – Leaving BSEC

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, RUS-BY and RUS-PL borders in 2013-I.

Average waiting time at external BSEC borders in 2012-I was 207,5 minutes, which decreased almost more than half percent in 2013-I to 82,0 minutes.

The increase in waiting times is observed at internal BSEC borders.

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

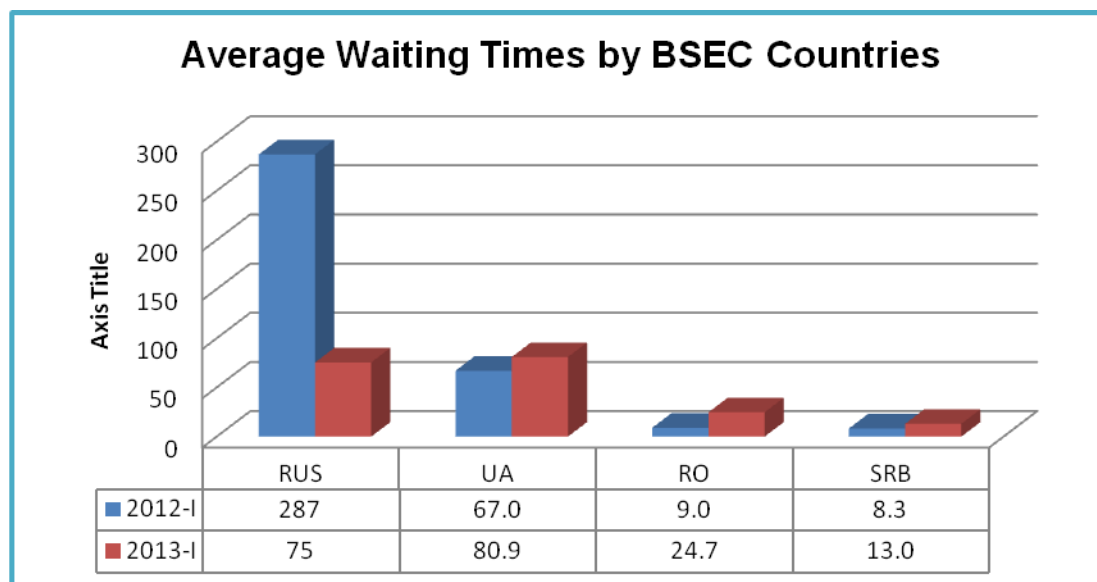


Fig. 10) Average waiting times by country.

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 2012-I and 2013-I.

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-I	2012-I	2013-I
BSEC Trade	100	139,9	175,9	220,3	289,7	325,8	232,3	314,2	192,3	220,0	182,8
Internal Waiting Times	100	41,7	158,8	104,8	27,6	43,6	162,3	170,3	130,9	19,5	58,2
Non-BSEC Trade	100	127,0	154,2	190,4	226,4	267,3	206,3	233,4	156,4	171,7	167,7
External Waiting Times	100	106,8	173,4	519,4	590,4	323,1	468,7	605,4	507,8	237,1	93,7
Total BSEC Trade	100	129,0	157,5	195,0	236,0	276,2	210,2	245,6	162,1	179,0	170,0
Average Waiting Times	100	80,4	167,5	351,1	362,0	210,0	344,4	429,0	355,0	49,0	79,3

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

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