

G4013

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## 25<sup>th</sup> MEETING OF THE BSEC-URTA GENERAL ASSEMBLY

International Conference Centre Geneva (CICG)  
Level -1, Room 18  
Geneva, Switzerland  
Wednesday, 2 April 2014, at 16:00 hrs

### BSEC OUTLOOK 2013: 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 2013 in comparison with previous years.

#### I. INTERNATIONAL ROAD TRANSPORT INDUSTRY PERFORMANCE IN THE BSEC REGION IN THE YEAR 2013

No new data was available since the date of the previous Outlook Report (G3869).

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

(\*) assuming 20 tons per truck

Table 1) Road transport operations in BSEC region in 2012

#### I. 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 and in 2013 is presented in the tables below.

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

2013	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SRB	TR	UA	Total with BSEC	Total with World	BSEC /World %
AL						515.0			98.5		405.0	44.0	1,062.5	7,309.2	14.54%
AM				220.5	152.0	22.2		118.2	1,445.4		212.5	242.0	2,412.8	5,956.8	40.50%
AZ	0.0			138.7	650.4	815.1	4.2	128.8	2,583.0	5.4	1,989.8	864.7	7,180.1	34,688.0	20.70%
BG	104.7	27.1	40.5		531.5	3,956.1	125.6	4,567.3	7,106.0	839.5	4,653.2	1,328.0	23,279.5	63,724.6	36.53%
GE	0.2	497.6	1,348.3	351.0		74.2	27.0	328.3	779.6	1.9	1,529.0	795.1	5,732.2	10,784.0	53.15%
GR	541.5	14.3	935.2	3,848.8	292.5		80.0	1,515.5	9,404.6	496.1	5,752.2	449.0	23,329.7	98,768.5	23.62%
MD	0.3	1.6	6.7	116.0	28.0	64.6		1,135.3	1,420.0	18.6	508.1	800.1	4,099.3	7,891.7	51.94%
RO	55.3	8.0	95.7	4,281.0	419.0	1,605.0	1,379.3		4,984.7	1,054.0	5,864.0	1,888.0	21,634.0	139,208.3	15.54%
RU		1,341.8	3,545.9	2,919.3	681.5	6,855.8	1,738.4	3,661.6			32,755.8	39,586.2	93,086.3	844,198.0	11.03%
SRB				774.6		518.1		1,366.3	2,964.4		750.5	313.9	6,687.8	35,157.4	19.02%
TR	338.3	482.0	3,294.1	4,731.6	1,448.0	5,463.8	537.2	6,209.7	32,030.0	692.6		6,706.2	61,933.5	404,112.5	15.33%
UA	33.1	200.4	945.3	892.2	751.5	505.4	1,005.0	1,455.2	38,299.3	263.1	5,658.2		50,008.7	140,276.0	35.65%
<b>BSEC Region Total Foreign Trade</b>													<b>300,446.4</b>	<b>1,792,075.0</b>	<b>16.77%</b>

Table 5) Foreign Trade of the BSEC Countries in 2013(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 that there is 2.02% decrease in the foreign trade within BSEC countries, although comparing table 4 and table 5 we observe increase in the total foreign trade of BSEC countries. However, from the observation of these two tables, we see there has been decrease in two countries: Russia and Ukraine, which could be explained due to the political crisis that has arisen towards the end of 2013. The situation in the total BSEC foreign trade shows better result, as 2.00% increase comparing to 2012, where we observed slight decrease comparing to 2011.

	2007	2008	2009	2010	2011	% change to previous period	2012	% change to previous period	2013	% change to previous period
Foreign Trade Within BSEC	223.49	251.37	179.16	242.43	314,33	30%	306,65	-2.44%	300,44	-2.02%
Total BSEC Foreign Trade	1,207.44	1,413.11	1,075.80	1,256.57	1,768.75	40%	1,757.63	-0.6%	1,792.07	2.00%
Within BSEC/Total BSEC	18.51%	17.79%	16.65%	19.29%	17.77%		17.45%		16.76%	

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

## II. 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 is presented below.

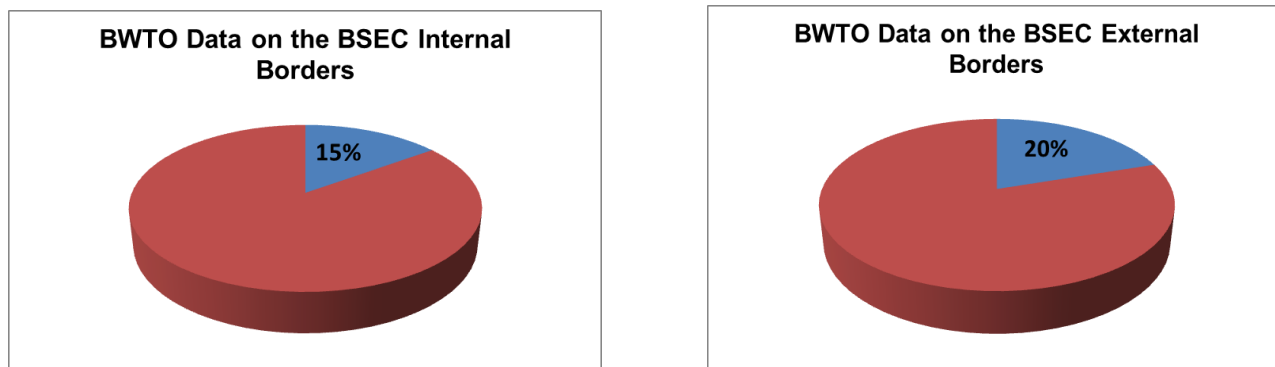


Fig. 4) BWTO Data on the BSEC Internal (3 out of 20) and External (6 out of 30) borders.

The data coverage of BSEC external borders have decreased, while the data coverage of BSEC internal borders in 2013 remained the same illustrated in Fig.4. Comparing these data coverage, we observe that year by year we are able to reach only very limited data, which further makes difficult to analyse the data.

In average, waiting times at BSEC borders have decreased both in the internal borders and the external borders with the average value of 63,1 minutes (see Fig.5). However, it is worthy to underline that this decrease is also could be observed due to the unavailability of data at several borders.

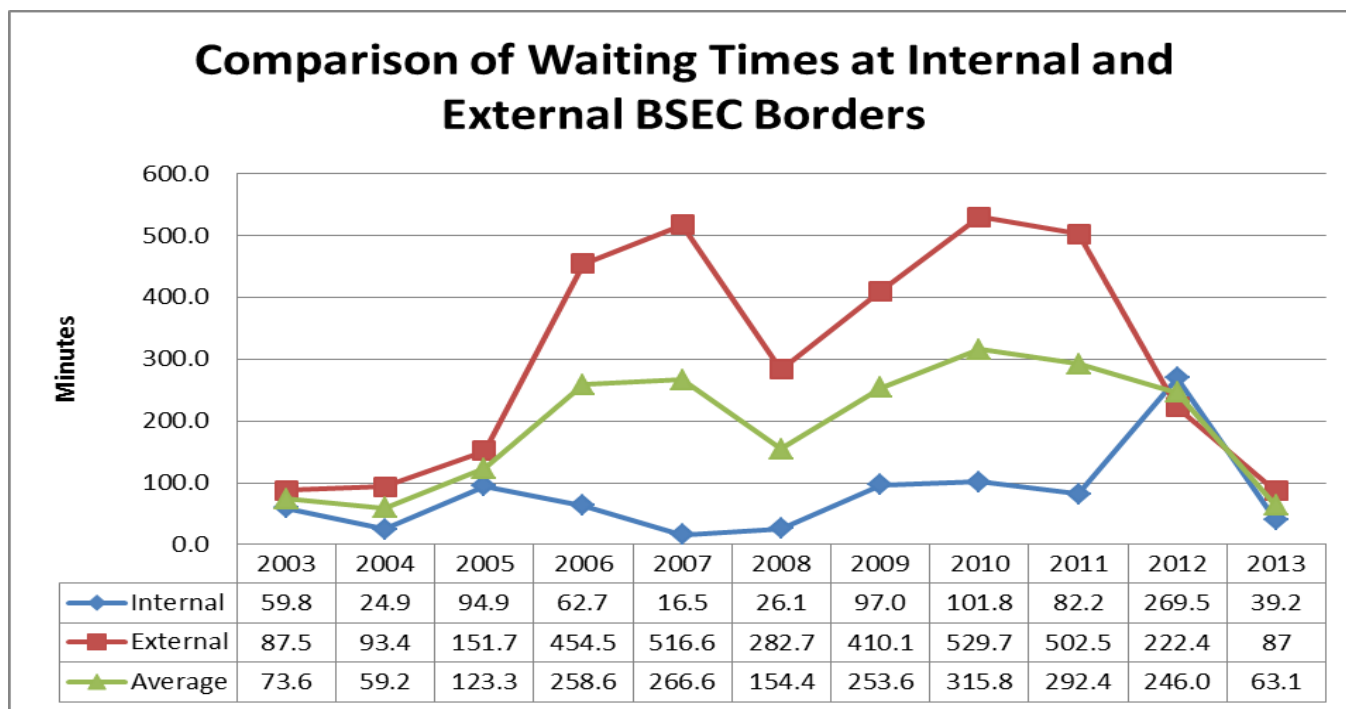


Fig. 5) Comparison of waiting times at Internal and External BSEC borders, and their average.

## SITUATION AT BSEC INTERNAL BORDERS

	2005	2006	2007	2008	2009	2010	% change to the previous period	2011	% change to the previous period	2012	% change to the previous period	2013	% 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%	210	-11%				
RO-SRB	18,8	15,0	8,5	8,0		32,2				776,7		13,0	-98,3%
RO-UA	25,5	15,9	4,0	1,8	60,0	90,9	51,5%	16	-82,4%	15,1	-5,6%	36,3	140%
RO-MD			4,0	1,9		4,0							
RUS-UA				34,0	60,0	146,3	143,9%	20,5	-86%	16,8	-18%	68,3	306%
Average	94,9	62,7	16,5	26,1	97,0	101,8	5,0%	82,2	-19,2%	269,5	228 %	39,2	-85,4%

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.

### SITUATION AT BSEC EXTERNAL BORDERS

	2007	2008	2009	2010	% change to the previous period	2011	% change to the previous period	2012			% change to the previous period	2013			% change to the previous period
	average	average	average	average		average		in BSEC	out BSEC	average	average	in BSEC	out BSEC	average	average
RUS-EST	2506,5	1212,4	1791,8	1869,8	4,3%	2020	8%	-	-	-	-	-	-	-	-
UA-BY		60,0	55,2	-		16,1		-	-	-	-	-	-	-	-
UA-PL	382,1	671,8	174,5	193,1	10,7%	93,8	-51,4%	157,8	59,2	108,5	15,7%	211,1	79,2	145,1	34,0%
UA-HUN	171,0	177,2	95,9	46,0	-52,0%	201,6	338%	147,3	139,7	143,5	-28,8%	116,3	32,2	74,2	-48,3%
UA-SLO	600,0	269,1	180,7	189,4	4,8%	395	108%	74,4	121,5	98	-75,2%	8,5	26,8	17,6	-82,0%
RO-HUN	2,8	8,4		-		-		-	-	-	-	-	-	-	-
SRB-MKD	16,7	12,4		-		-		-	-	-	-	-	-	-	-
GR-MKD	70,8	25,0		-		-		-	-	-	-	-	-	-	-
BG-MKD	38,7	35,2	93,5	-		-		-	-	-	-	-	-	-	-
SRB-HUN	15,2	9,8	25,6	-		-		4,6	26,3	15,5	-	5,3	12,3	8,8	
RUS-FI	768,3	493,1	680,0	-		-		-	-	-	-	-	-	-	-
RUS-BY	93,8	80,5		-		-		-	-	-	-	-	-	-	-
RUS-LT	584,8	421,7	468,6	321,3	-31,4%	336	5%		221	221	-34,2%	-	50,5	50,5	-77,1%
RUS-LV	1758,8	394,9	615,3	793,7	29,0%	853	7,5%	390,2	596,7	493,5	-42,1%	245,6	206,2	226,0	-54,2%
RUS-PL	223,4	369,2	329,7	294,6	-10,6%	105	-64,3%		270	270	157%	-	-	-	-
average	516,64	282,71	410,1	529,7	30,0%	502,5	-5,1%	155	205	222,4	-55,7%	117,4	67,9	87,0	-60,8%

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

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 2013 too, as in previous years.

The waiting times between UA-SLO has improved comparing to previous year, as well as we can observe improvement between RUS-LT and RUS-LV.

### III. 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	2013
BSEC Trade	100	139,9	175,9	220,3	289,7	325,8	232,3	314,2	407,4	397,5	389,4
Internal Waiting Times	100	41,7	158,8	104,8	27,6	43,6	162,3	170,3	137,5	451,0	65,6
Non-BSEC Trade	100	127,0	154,2	190,4	226,4	267,3	206,3	233,4	334,7	334,0	343,3
External Waiting Times	100	106,8	173,4	519,4	590,4	323,1	468,7	605,4	574,3	254,1	99,4
Total BSEC Trade	100	129,0	157,5	195,0	236,0	276,2	210,2	245,6	345,6	343,5	350,2
Average Waiting Times	100	80,4	167,5	351,1	362,0	210,0	344,4	429,0	397,1	334,1	85,7

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