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BSEC Headquarters
Istanbul, Turkey
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BSEC OUTLOOK 2014-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 2013-I in comparison with 2014-I.

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

| 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 | 12 | 73 | 230 | 573 | 125 | | 470 | 9,369 | 89 | 3,727 | 2,549 | 17,219 | 4,299 | 1,897 | 23,415 |
| RO | 40 | 47 | 139 | 36,200 | 185 | 19,100 | 11,900 | | 3,100 | 6,000 | 32,400 | 2,000 | 74,686 | 890,000 | 7,089 | 971,775 |
| RU | 0 | 126 | 1,877 | 62 | 474 | 108 | 135 | 332 | | 131 | 951 | 1,167 | 5,237 | | | 5,237 |
| 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 |
| Total | | | | | | | | | | | | | 491,153 | 1,379,966 | 552,363 | 2,423,482 |

Table 1) Road transport operations in BSEC region in 2013-I
Marked with red indicates that the table has been updated.

| 2014-I | AL | AM | AZ | BG | GE | GR | MD | RO | RU | SRB | TR | UA | BSEC | EU24 | Others | Total |
|--------------|-------|-------|--------|--------|--------|--------|--------|--------|--------|--------|--------|-------|---------|---------|---------|-----------|
| AL | | | 17 | 394 | | 26,715 | | 104 | 7 | 241 | 822 | 53 | 28,353 | 18,236 | 8 | 46,597 |
| AM | | | | 3 | 625 | 3 | 1 | 2 | 1,750 | | | 30 | 2,414 | 7 | 8 | 2,429 |
| AZ | | | | 50 | 500 | | 50 | | 2,000 | | 400 | 200 | 3,200 | 100 | 250 | 3,550 |
| BG* | 625 | | | | | 89,745 | | 14,550 | 735 | 13,025 | 30,995 | 1,265 | 150,940 | 84,680 | 7,515 | 243,135 |
| GE | | 898 | 5,890 | 435 | | 627 | 15 | 386 | 2,321 | 14 | 4,076 | 1,130 | 15,792 | 3,290 | 137 | 19,219 |
| GR | | | | | | | | | | | | | | | | 0 |
| MD | 3 | 19 | 51 | 236 | 119 | 76 | | 438 | 5,605 | 76 | 2,428 | 2,356 | 11,407 | 3,961 | 2,237 | 17,605 |
| RO | 73 | 50 | 106 | 14,500 | 200 | 9,500 | 8,600 | | 900 | 2,100 | 14,400 | 600 | 51,029 | 434,100 | 4,771 | 489,900 |
| RU | 0 | 211 | 2,393 | 101 | 1,405 | 109 | 255 | 639 | | 505 | 1,448 | 1,130 | 8,196 | | | 8,196 |
| SRB | | | | | | | | | | | | | | | | 0 |
| TR | 1,902 | 9 | 34,818 | 6,934 | 22,381 | 8,753 | 788 | 14,446 | 6,729 | 2,304 | | 1,866 | 100,930 | 74,969 | 475,305 | 651,204 |
| UA | | 1,122 | 1,786 | 4,402 | 3,652 | 771 | 13,203 | 8,769 | 21,072 | 1,086 | 6,287 | | 62,150 | 242,004 | 29,538 | 333,692 |
| Total | | | | | | | | | | | | | 434,411 | 861,347 | 519,769 | 1,815,527 |

Table 2) Road transport operations in BSEC region in 2014-I

Figures 1 and 2, shows the total international trips in the BSEC region in 2013-I and 2014-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 2014-I the total road transport operations decreased from 2,423,482 to 1,815,527 (25,1%).

In 2014-I compared with 2013-1 the share of operations within BSEC in total transport operations has increased, while the share of EU operations has decreased by 10% and to other destinations we observe 6% increase.

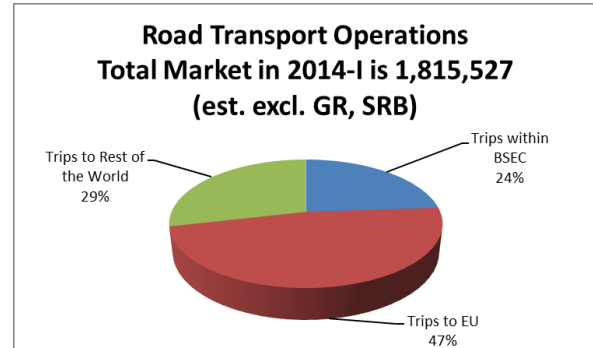
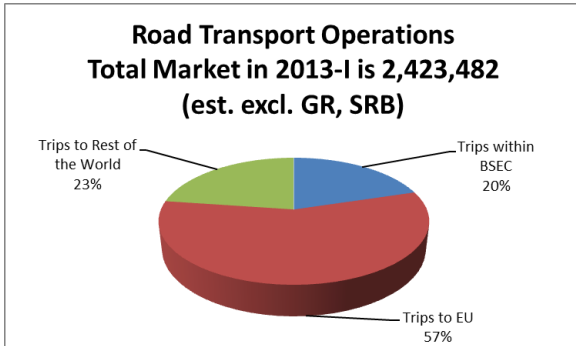


Fig.1) International road transport trips by the BSEC hauliers in 2013-I Fig.2) International road transport trips by the BSEC hauliers in 2014-I

Figure 3 shows the share between BSEC Countries in the whole international road transport market of the BSEC Region according to data for the 2014-I. Since there were no data provided for, GR and SRB, these countries are not included in the chart.

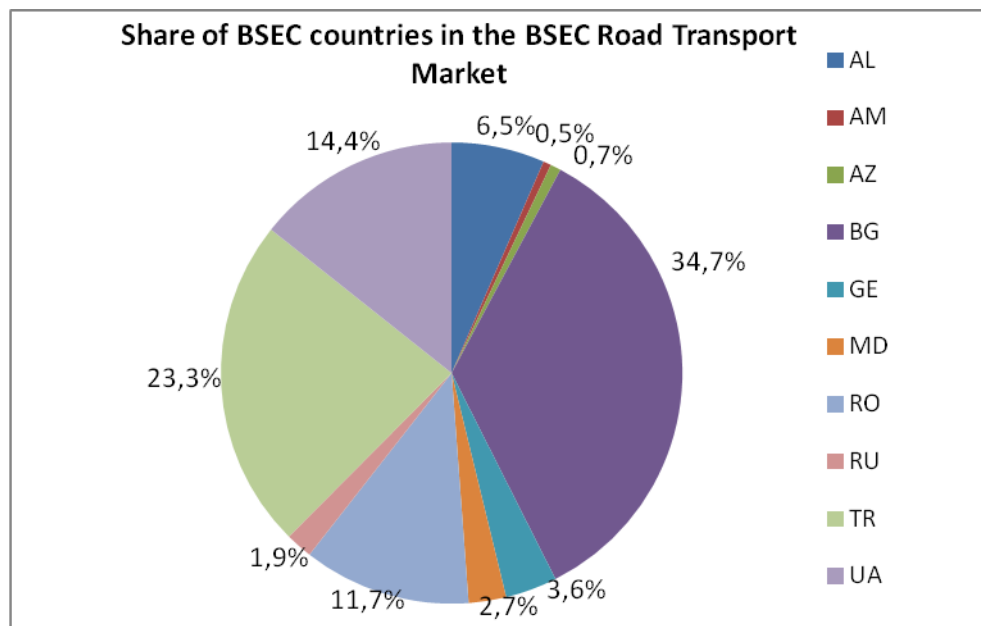


Fig.3) Share of BSEC Countries in the BSEC International Road Transport Market in 2014-I.

Table 3 shows the comparison of the situation at the BSEC International Road Transport Market in 2007-2014-I. Total number of trips has decreased by 25% comparing to 2013-I, from which it is observed decrease of 11.5 % within the BSEC and the trips to EU24 by 37.0%, and 6.0% decrease in the trips to the rest of the world.

| | 2007 | 2008 | 2009 (upd.) | 2010 | 2011-I(*) | 2012-I(*) | 2013-I(**) | % change to the previous period | 2014-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 | 1,989,519 | 2,423,482 | 21,8 % | 1,815,527 | -25,0 % |
| Trips within BSEC | 728,712 | 814,583 | 733,008 | 736,673 | 426,030 | 439,731 | 491,153 | 11,7 % | 434,411 | -11,5 % |
| Trips to EU24 | 1,222,228 | 1,621,897 | 1,283,773 | 1,630,391 | 805,397 | 830,257 | 1,379,966 | 66,2 % | 861,347 | -37,0% |
| Trips to Rest of the World | 651,605 | 591,842 | 808,248 | 1,357,856 | 723,883 | 793,353 | 552,363 | -30,0 % | 519,769 | -6,0% |
| BSEC Trips/Total Trips, % | 28,7% | 26,9% | 25,9% | 19,8% | 21,8 % | 22,1% | 20,3% | | 24,0% | |

Table 3) Comparative table of the BSEC International Road Transport Market in 2007-2014-I.

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

(**) The data has been updated

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 2013-I and in 2014-I is presented in the tables below.

| 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 4) Foreign Trade of the BSEC Countries in 2013-I (in million USD)

Source: National Statistics Institutes

| 2014-I | AL | AM | AZ | BG | GE | GR | MD | RO | RU | SRB | TR | UA | Total with BSEC | Total with World | BSEC /World % |
|--|-------|-------|---------|---------|-------|---------|-------|---------|----------|-------|----------|----------|------------------|------------------|---------------|
| AL | | 64.3 | 7.3 | 44.8 | 22.4 | 298.1 | 34.4 | 26.8 | 56.0 | | 235.0 | 21.1 | 810.2 | 3,835.4 | 21.12% |
| AM | | | | 70.1 | 73.0 | 7.6 | | 23.0 | 596.0 | | 107.0 | 91.5 | 968.2 | 2,722.9 | 35.56% |
| AZ | 0.0 | | | 51.5 | 314.1 | 88.7 | 2.8 | 107.2 | 922.7 | 2.3 | 812.5 | 230.6 | 2,532.4 | 15,371.0 | 16.48% |
| BG | 45.3 | 12.3 | 25.5 | | 260.0 | 1,742.7 | 71.8 | 2,292.9 | 2,747.7 | 424.8 | 2,398.2 | 502.0 | 10,523.2 | 42,333.0 | 24.86% |
| GE | 0.1 | 270.4 | 584.3 | 195.3 | | 62.5 | 9.3 | 152.3 | 364.0 | 1.8 | 939.5 | 327.0 | 2,906.5 | 5,447.1 | 53.36% |
| GR | 359.6 | 5.9 | 146.0 | 1,877.8 | 121.6 | | 67.2 | 811.5 | 3,945.3 | 227.4 | 2,891.9 | 186.2 | 10,640.4 | 68,599.6 | 15.51% |
| MD | 0.1 | 0.1 | 3.0 | 58.4 | 11.5 | 37.6 | | 561.3 | 599.5 | 9.8 | 211.5 | 312.4 | 1,805.2 | 3,719.6 | 48.53% |
| RO | 25.5 | 3.0 | 98.2 | 2,236.9 | 167.2 | 914.7 | 747.1 | | 2,503.9 | 563.4 | 2,948.5 | 753.5 | 10,961.9 | 100,557.1 | 10.90% |
| RU | | 568.1 | 1,925.1 | 1,068.9 | 332.7 | 2,079.7 | 885.2 | 1,865.5 | | | 15,721.3 | 18,475.0 | 42,921.5 | 396,285.9 | 10.83% |
| SRB | | | | 397.1 | | 240.3 | | 659.4 | 1,610.9 | | 401.3 | 143.8 | 3,452.8 | 17,850.2 | 19.34% |
| TR | 205.5 | 0.6 | 1,466.3 | 2,393.8 | 764.2 | 2,717.1 | 294.6 | 3,131.4 | 16,025.3 | 385.5 | | 3,006.8 | 30,391.1 | 199,986.2 | 15.20% |
| UA | 3.5 | 112.4 | 179.0 | 298.6 | 400.6 | 282.8 | 389.2 | 402.5 | 24,464.2 | 56.3 | 1,301.2 | | 27,890.4 | 87,425.1 | 31.90% |
| BSEC Region Total Foreign Trade | | | | | | | | | | | | | 145,803.8 | 944,133.1 | 15.44% |

Table 5) Foreign Trade of the BSEC Countries in 2014-I (in million USD)

Source: National Statistics Institutes

The total foreign trade number with the world marked in red indicates EU28 (including Croatia since 1 July, 2013)

The following table shows different foreign trade indicators of the BSEC region in the period 2008-2014-I, and percentage changes between periods. In 2014-I compared with 2013-I there is an increase of 3,36% in the volume of trade within BSEC region, as well as increase in the total BSEC foreign trade by 8,54%.

| | 2008 | 2009 | 2010 | 2011-I | 2012-I | 2013-I | % change to previous period | 2014-I | % change to previous period |
|---------------------------|----------|----------|----------|--------|--------|--------|-----------------------------|--------|-----------------------------|
| Foreign Trade Within BSEC | 251,37 | 179,16 | 242,43 | 149,89 | 169,72 | 141,06 | -16,88% | 145,80 | 3,36% |
| Total BSEC Foreign Trade | 1.413,11 | 1.075,80 | 1.256,57 | 829,62 | 915,97 | 869,84 | -5,03% | 944,13 | 8,54% |
| Within BSEC/Total BSEC | 17,79% | 16,65% | 19,29% | 18,07% | 18,53% | 16,22% | | 15,44% | |

Table 6) Foreign trade of the BSEC region in 2007-2014-I.

Based on the data presented in sections II of the current report, the BSEC-URTA International Secretariat, created an index based on available data for 2003, and the change in the different trade indicators since 2003 until 2014-I is presented in the table below.

| | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011-I | 2012-I | 2013-I | 2014-I |
|----------------------------------|------|-------|-------|-------|-------|-------|-------|-------|--------|--------|--------|--------|
| Trade Within BSEC | 100 | 139,9 | 175,9 | 220,3 | 289,7 | 325,8 | 232,3 | 314,2 | 192,3 | 220,0 | 182,8 | 189,0 |
| BSEC Trade with the world | 100 | 127,0 | 154,2 | 190,4 | 226,4 | 267,3 | 206,3 | 233,4 | 156,4 | 171,7 | 167,7 | 183,7 |
| Total BSEC Trade | 100 | 129,0 | 157,5 | 195,0 | 236,0 | 276,2 | 210,2 | 245,6 | 162,1 | 179,0 | 170,0 | 184,5 |

It is observed that the trade indicators of BSEC (trade within the region, trade of the region with other regions and total trade) in 2014-I compared with 2013-I are higher. At the same time looking to the road transport operations (within the region, the region with other regions and total) they are lower in 2014-I compared with 2013-I. Since all BSEC countries have strong trade relations with Russia which introduced in mid 2013 restrictions to the TIR System coverage on its territory and thus creating barriers to road hauliers one could say that traders shifted to other modes of transport in their trade relations with Russia. At the same time the political situation in east of Ukraine could be another factor generating a decrease in the international road transport operations so traders looking for other transport options in the movement of goods to/through the region.

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