

G4318

Istanbul, 23 November 2015

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

Elite World Istanbul Hotel  
Istanbul-Turkey  
Thursday, 3 December at 11:00 hrs

### BSEC OUTLOOK 2015-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 2014-I in comparison with 2015-I.

#### I. INTERNATIONAL ROAD TRANSPORT INDUSTRY PERFORMANCE IN THE BSEC REGION IN THE YEAR 2015-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.

2014-I	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SRB	TR	UA	BSEC	EU28	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							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

(\*) assuming 20 tons per truck

Table 1) Road transport operations in BSEC region in 2014-I

2015-I	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SRB	TR	UA	BSEC	EU28	Others	Total
AL			5	453		25,345		125	12	364	1,036	75	27,415	19,587	10	47,012
AM				2	585	5		3	1,560	1		23	2,179	11	5	2,195
AZ				10	400		40	50	1,300		200	100	2,100	62		2,162
BG													-			
GE		2,456	3,187	911		715	12	989	1,890		2,857	987	14,004	1,971	198	16,173
GR													-			
MD	2	3	26	137	125	186		420	3,081	61	2,219	2,246	8,506	3,168	3,655	15,329
RO	35	21	150	21,000	110	13,170	3,750		5,740	1,250	12,580	833	58,639	370,400	9,410	438,449
RU		625	3,014	339	3,911	97	281	573		615	1,394	1,312	12,161			12,161
SRB													-			
TR	1,556	12	35,622	6,298	16,611	7,808	529	11,314	6,486	2,017		779	89,032	149,108	366,109	604,249
UA		1,211	3,049	5,395	3,918	553	13,562	10,860	23,561	1,338	6,716		70,163	207,409	28,748	306,320

(\*) assuming 20 tons per truck

Table 2) Road transport operations in BSEC region in 2015-I

Figures 1 and 2, shows the total international trips in the BSEC region in 2014-I and 2015-I. Three categories: trips within the BSEC region, trips to the EU28 (EU countries except BG, GR and RO) and

trips to the rest of the world. As we observe from these figures the total road transport operations decreased from 1,815,527 to 1,444,050. We continue to observe such decrease since the first half of 2013 (Figure 3). This could be explained due to the decrease in the foreign trade of BSEC countries (see second part of the report)

In 2015-I compared with 2014-I the share of operations within BSEC and trips to the rest of the world has decreased, while the share of EU operations has increased by 5%.

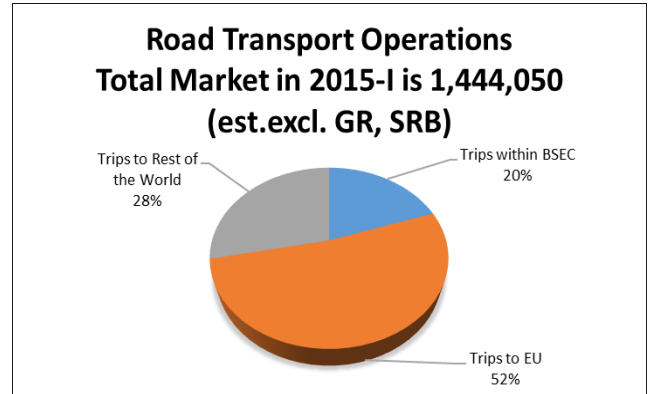
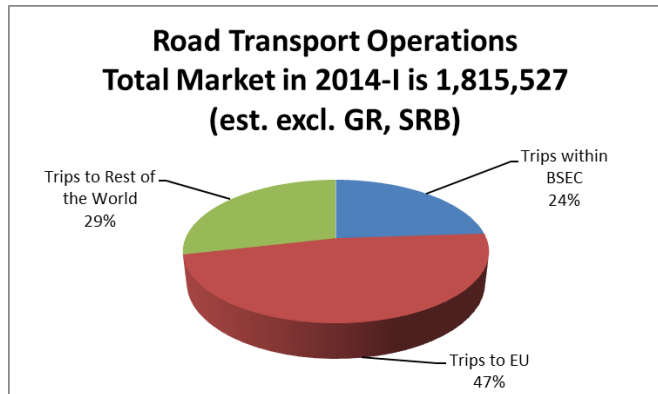


Fig.1) International road transport trips by the BSEC hauliers in 2014-I

Fig.2) International road transport trips by the BSEC hauliers in 2015-I

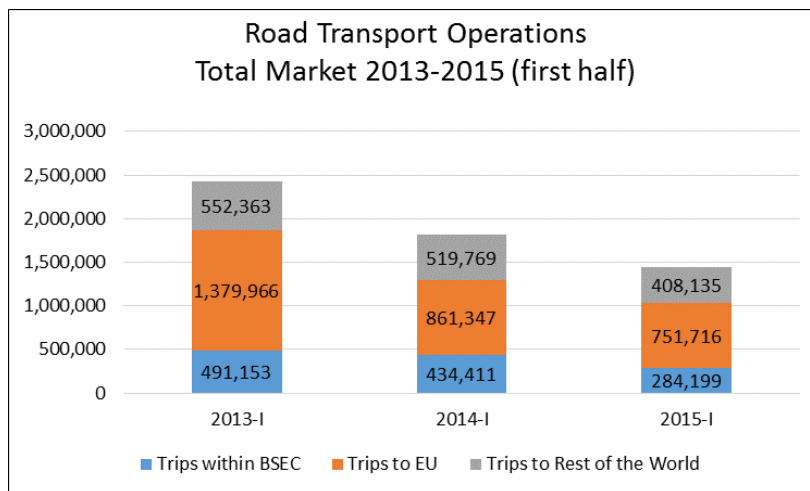


Fig.3) International road transport trips by the BSEC hauliers from 2013 to 2015 (first half of the year)

Figure 3 shows the share between BSEC Countries in the whole international road transport market of the BSEC Region according to data for the 2015-I. Since there were no data provided for BG, GR and SRB, these countries are not included in the chart.

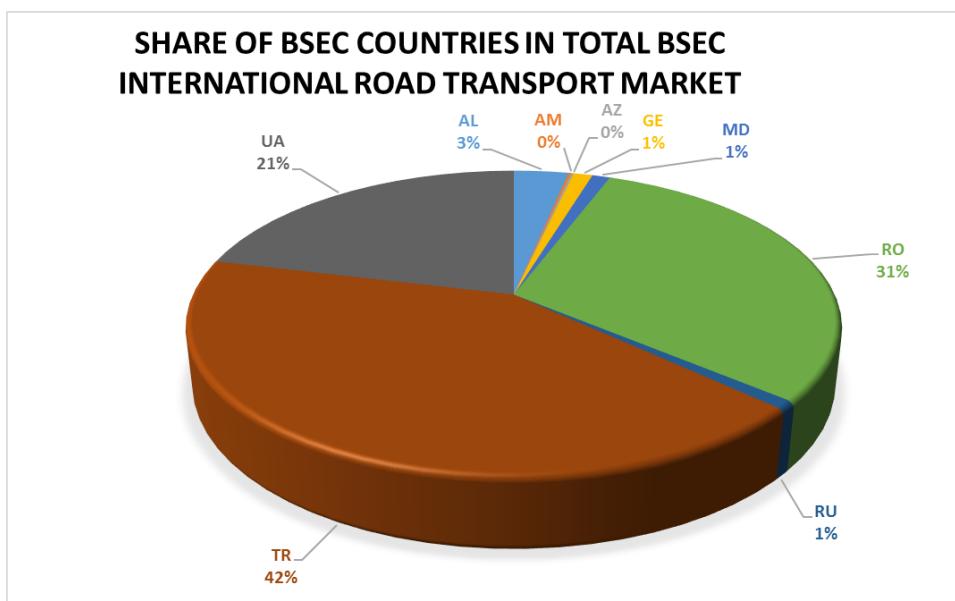


Fig.3) Share of BSEC Countries in the whole BSEC International Road Transport Market in 2015-I.

Table 3 shows the comparison of the situation at the BSEC International Road Transport Market in 2008-2015-I. Total number of trips has decreased by 20,5% comparing to 2014-I, from which it is observed a

big decrease of 34.6 % within the BSEC and the trips to EU28 by 12.7%, and 21.5% decrease in the trips to the rest of the world.

	2008	2009 (upd.)	2010	2011-I(*)	2012-I	2013-I	2014-I	% change to the previous period	2015-I(*)	% change to the previous period
Total number of trips	3,028,321	2,825,029	3,719,998	1,955,310	1,989,519	2,423,482	1,815,527	-25,0 %	1,444,050	-20.5%
Trips within BSEC	814,583	733,008	736,673	426,030	439,731	491,153	434,411	-11,5 %	284,199	-34.6%
Trips to EU28	1,621,897	1,283,773	1,630,391	805,397	830,257	1,379,966	861,347	-37,0%	751,716	-12.7%
Trips to Rest of the World	591,842	808,248	1,357,856	723,883	793,353	552,363	519,769	-6,0%	408,135	-21.5%
BSEC Trips/Total Trips, %	26,9%	25,9%	19,8%	21,8 %	22,1%	20,3%	24,0%		20,0%	

Table 3) Comparative table of the BSEC International Road Transport Market in 2008-2015-I.

(\*) Estimated data preserves the tendency of the region excluding GR 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 2014-I and in 2015-I is presented in the tables below.

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%
<b>BSEC Region Total Foreign Trade</b>													<b>145,803.8</b>	<b>944,133.1</b>	<b>15.44%</b>

Table 4) Foreign Trade of the BSEC Countries in 2014-I (in million USD)

Source: National Statistics Institutes

2015-I	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SRB	TR	UA	Total with BSEC	Total with World	BSEC /World %
AL		3.3		40.0	11.5	217.7	82.4	33.0	39.3	98.4	200.0	13.9	739.5	3,090.5	23.93%
AM				54.0	72.4	5.7		23.1	491.2	1.4	63.0	62.0	772.8	2,186.0	35.35%
AZ	0.0			6.0	262.7	100.3	1.7	63.0	978.7	2.4	748.3	157.6	2,320.7	10,930.1	21.23%
BG	43.0	12.4	12.5		225.2	1,506.0	49.6	1,958.5	1,994.3	398.4	2,057.7	369.5	8,626.9	27,250.2	31.66%
GE	0.2	191.6	408.6	173.6		42.3	9.2	107.1	336.7	0.6	755.7	257.6	2,283.2	4,761.1	47.96%
GR	256.6	4.2	151.4	1,536.4	41.7		69.6	827.4	1,969.4	207.3	1,729.5	183.3	6,976.9	39,406.3	17.70%
MD	0.2	0.7	1.5	47.0	10.5	23.3		501.3	404.0	7.7	181.4	187.7	1,365.3	2,977.8	45.85%
RO	32.9	2.3	21.6	1,979.4	111.8	824.0	667.7		1,823.5	560.3	2,488.3	473.2	8,984.9	64,038.8	14.03%
RU		543.9	1,408.3	1,122.1	298.2	1,276.1	670.8	1,404.7			12,530.0	7,441.1	26,695.2	268,514.7	9.94%
SRB				345.7		207.7	25.3	712.4	1,240.4		417.6	108.2	3,057.3	15,630.7	19.56%
TR	135.0	264.2	988.7	1,692.6	549.0	1,511.0	213.2	2,244.7	10,900.7	303.6		1,936.7	20,739.4	150,087.9	13.82%
UA		39.1	1,296.8	244.5	594.8	15.5	729.8	1,266.6	29,159.6	14.6	98.0		33,459.3	100,034.8	33.45%
<b>BSEC Regional Total Foreign Trade</b>													<b>116,021.3</b>	<b>688,908.8</b>	<b>16.84%</b>

Table 5) Foreign Trade of the BSEC Countries in 2015-I(in million USD)

Source: National Statistics Institutes

The following table shows different foreign trade indicators of the BSEC region in the period 2009-2015-I, and percentage changes between periods. We observe a big decrease in the volume of trade within

BSEC Region by 20,4%, as well as the same result is seen in the total BSEC Foreign Trade by 27,0%. One of the big decreases is seen in the foreign trade is between Azerbaijan and Bulgaria, as well as in Russia's total BSEC foreign trade which has been to half of the volume comparing to the first half of 2014.

	2009	2010	2011-I	2012-I	2013-I	2014-I	% change to previous period	2015-I	% change to previous period
<b>Foreign Trade Within BSEC</b>	179,16	242,43	149,89	169,72	141,06	145,80	3,36%	116,02	-20,4%
<b>Total BSEC Foreign Trade</b>	1.075,80	1.256,57	829,62	915,97	869,84	944,13	8,54%	688,91	-27,0%
<b>Within BSEC/Total BSEC</b>	16,65%	19,29%	18,07%	18,53%	16,22%	15,44%		16,84%	

Table 6) Foreign trade of the BSEC region in 2009-2015-I (in billion USD).

### III. CORRELATION ANALYSIS OF TRADE IN THE BSEC REGION

Based on the data presented in section II, the BSEC-URTA International Secretariat made another analysis to check if there is a correlation in foreign trade volume 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	2014-I	2015-I
<b>BSEC Trade</b>	100	139,9	175,9	220,3	289,7	325,8	232,3	314,2	192,3	220,0	182,8	189,0	150,4
<b>Non-BSEC Trade</b>	100	127,0	154,2	190,4	226,4	267,3	206,3	233,4	156,4	171,7	167,7	183,7	131,8
<b>Total BSEC Trade</b>	100	129,0	157,5	195,0	236,0	276,2	210,2	245,6	162,1	179,0	170,0	184,5	134,7

Table 7) Correlation analysis between trade and waiting times at borders in the BSEC Region

\* \* \*