

29th MEETING OF THE BSEC-URTA GENERAL ASSEMBLY

Pullman Hotel
Bucharest-Romania
Thursday, 26 May 2016, at 11:00 hrs

BSEC OUTLOOK 2015: 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 2015 in comparison with previous years.

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

According to the data collected from the BSEC-URTA Member Associations, the performance of the industry is shown only for certain countries in the tables below. The table below for 2014 has been updated with newly provided data and marked with red, as the data was missing back in 2014 and the comparison is done accordingly to the updated version of the table.

2014	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SRB	TR	UA	BSEC	EU25	Others	Total
AL			26	531		40,457		178	12	536	1,502	86	43,328	32,456	14	75,798
AM				6	1,480	5	2		3,350			25	4,868	15	3	4,886
AZ				10	500		10	10	1,500		600	200	2,830	1,500	109	4,439
BG	625					96,035		42,800	2,410	8,295	28,865	1,825	180,855	96,925	10,210	287,990
GE																
GR																
MD	5	40	96	391	241	98		429	7,982	78	2,402	731	12,493	2,931	7,098	22,522
RO																
RU		663	6,214	359	4,409	185	599	1,491		1,205	3,164	1,503	19,792			19,792
SRB																
TR	4,040	22	76,973	13,346	44,968	17,714	1,394	23,834	13,681	4,453		3,526	203,951	294,325	756,146	1,254,422
UA		2,538	3,371	10,589	8,099	1,941	33,623	19,705	44,297	2,315	13,503		139,981	455,035	62,131	657,147

(*) assuming 20 tons per truck

Table 1) Road transport operations in BSEC region in 2014

2015	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SRB	TR	UA	BSEC	EU25	Others	Total
AL			7	575		36,892		236	24	1,069	1,637	92	40,532	31,897	16	72,445
AM				5	1,650	7			3,540			37	5,239	25	12	5,276
AZ				10	800	5	10		1,300		350	105	2,580	1,000	419	3,999
BG	390		645		830	90,095		63,205	3,365	11,890	41,105	540	212,065	126,480	23,920	362,465
GE		3,144	11,711	2,247		1,211	36	1,912	10,141	117	15,711	2,512	48,742	4,777	987	54,506
GR																
MD	2	13	54	273	174	138		427	5,934	66	1,005	652	8,738	2,545	6,281	17,564
RO																
RU																
SRB																
TR	3,256	27	69,131	13,143	36,395	16,679	1,051	23,236	11,620	4,353		2,614	181,505	257,927	741,551	1,180,983
UA		2,309	3,297	10,881	7,561	1,346	34,609	21,238	45,316	3,100	12,179		141,836	445,545	56,717	644,098

(*) assuming 20 tons per truck

Table 2) Road transport operations in BSEC region in 2015

Figures 1 and 2, shows the total international trips in the BSEC region in 2014 and 2015. Three categories: trips within the BSEC region, trips to the EU25 (EU countries except GR, RO) and trips to the rest of the world. We observe slight decrease in the total market of road transport operations from 2,420,894 to 2,369,711 and it could be explained due to the decrease in the foreign trade of BSEC countries (see second part of the report). Share of operations within BSEC has decreased by 1% comparing to 2014, while trips to EU has increased by 1% and trips to the rest of the world remains the same.

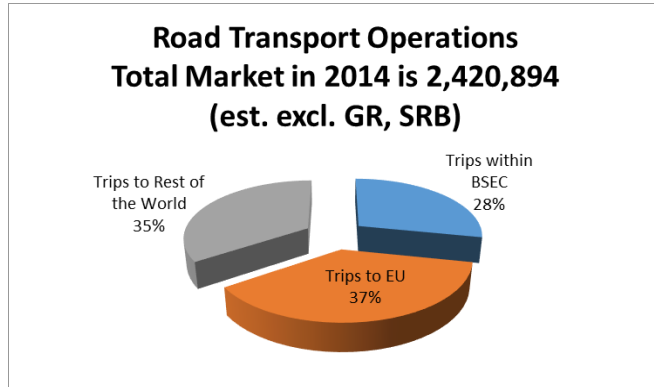


Fig.1) International road transport trips by the BSEC hauliers in 2014

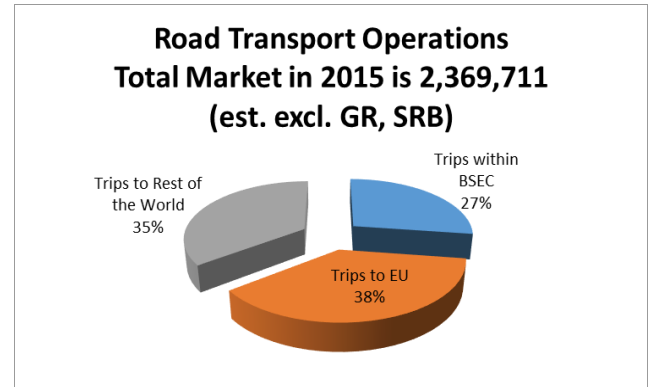


Fig.2) International road transport trips by the BSEC hauliers in 2015

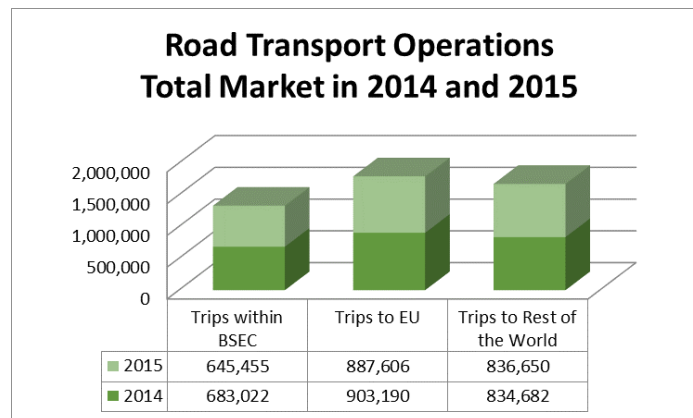


Fig.3) International road transport trips by the BSEC hauliers in 2014 and 2015

Figure 4 shows the share between BSEC Countries in the whole international road transport market of the BSEC Region according to data for the 2015. Since there were no data provided for, GR, RO, RUS and SRB these countries are not included in the chart.

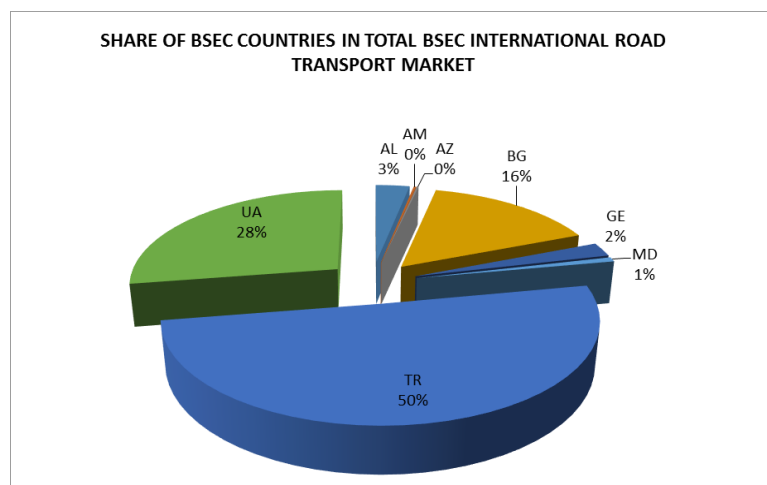


Fig.4) Share of BSEC Countries in the whole BSEC International Road Transport Market in 2015.

Table 3 shows the comparison of the situation at the BSEC International Road Transport Market in 2007-2015. Total number of trips has decreased by 2.1% comparing to 2014, from which it is observed a downfall of 5.5% in the trips within BSEC and trips to the EU by 1.7%, while there is slight increase in the trips to the rest of the world.

	2007	2008	2009 (upd.)	2010	2011	2012(*)	2013*	2014	2015	% change to the previous period
Total number of trips	2,602,545	3,028,321	2,825,029	3,719,998	3,918,789	4,159,100		2,420,894	2,369,711	-2,1%
Trips within BSEC	728,712	814,583	733,008	736,673	1,026,167	1,222,848		683,022	645,455	-5.5%
Trips to EU	1,222,228	1,621,897	1,283,773	1,630,391	1,665,687	1,760,060		903,190	887,606	-1.7%
Trips to Rest of the World	651,605	591,842	808,248	1,357,856	1,226,935	1,176,192		834,682	836,650	0.2%
BSEC Trips/Total Trips, %	28,7%	26,9%	25,9%	19,8%	26,1%	29,40%		28,2%	27,2%	

Table 3) Comparative table of the BSEC International Road Transport Market in 2007-2015.

*The data for 2013 was not provided, therefore missing in the table.

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 and in 2015 is presented in the tables below.

2014	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SRB	TR	UA	Total with BSEC	Total with World	BSEC /World %
AL		66.3	7.4	101.7	54.0	588.0	214.0	67.2	117.2	244.0	474.1	36.6	1,970.5	7,801.2	25.26%
AM				111.1	156.0	15.6		39.5	1,403.0		234.0	213.0	2,172.2	5,921.0	36.69%
AZ	0.0			124.6	623.4	318.8	5.5	142.1	1,954.7	3.8	1,789.1	468.0	5,430.0	31,016.3	17.51%
BG	109.5	23.2	36.6		490.8	3,577.8	1,686.5	10,652.1	10,914.5	768.7	4,724.0	1,310.0	34,293.7	59,501.7	57.63%
GE	0.2	498.5	925.8	374.0		131.2	18.3	315.7	852.7	0.1	1,966.7	686.3	5,769.5	11,457.5	50.36%
GR	612.2	12.2	514.6	3,570.4	172.3		137.9	1,555.9	6,338.9	429.2	5,412.7	405.4	19,161.7	91,467.6	20.95%
MD	7.0	2.6	6.0	119.2	26.7	63.5		1,237.1	1,141.0	23.4	405.5	655.6	3,687.6	7,656.5	48.16%
RO	55.2	7.1	128.0	4,221.7	306.7	1,661.8	1,465.5		4,567.3	1,153.1	5,267.5	1,309.3	20,143.2	135,558.3	14.86%
RU		1,401.4	4,008.1	2,115.4	786.0	4,167.8	1,796.4	3,670.8			31,099.0	27,861.9	76,906.8	782,926.6	9.82%
SRB				814.6		485.0		1,461.8	3,455.6		843.8	263	7,323.8	36,427.7	20.11%
TR	414.8	1,464.7	3,166.3	4,886.6	1,676.4	5,580.7	533.7	6,371.7	31,232.9	780.5		5,972.0	62,080.2	399,810.2	15.53%
UA	7.4	232.0	386.0	604.3	656.4	509.6	872.1	684.5	22,477.8	119.1	2,818.2		29,367.4	169,494.5	17.33%
BSEC Region Total Foreign Trade													268,306.6	1,739,039.1	15.0%

Table 3) Foreign Trade of the BSEC Countries in 2014 (in million USD)

Marked with red is updated as of 23 May, 2016

Source: National Statistics Institutes

2015	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SRB	TR	UA	Total with BSEC	Total with World	BSEC /World %
AL		45.0		86.0	129.6	424.0	317.4	60.0	98.0	194.0	411.0	30.2	1,795.2	6,394.2	28.08%
AM				105.0	183.0	17.2		56.0	1,174.0		138.5	130.9	1,804.6	4,740.8	38.07%
AZ	0.0			13.2	434.0	162.0	4.1	148.6	1,854.6	4.0	1,475.7	333.1	4,429.3	20,645.8	21.45%
BG	94.0	24.0	25.0		455.4	3,195.5	106.5	4,231.5	4,085.4	827.0	3,991.7	754.2	17,790.3	56,943.5	31.24%
GE	0.3	355.1	778.4	381.8		81.0	16.8	234.1	787.1	2.5	1,517.5	515.0	4,669.7	9,933.2	47.01%
GR	515.2	11.6	263.2	3,267.2	96.6		143.2	1,674.8	4,173.2	423.4	3,497.1	419.1	14,484.5	79,875.2	18.13%
MD	0.2	1.7	3.8	96.6	19.8	45.1		1,001.5	776.3	18.4	349.5	416.9	2,729.7	5,953.7	45.85%
RO	65.2	4.9	169.6	4,236.1	235.8	1,662.8	1,409.2		3,439.5	1,164.9	5,102.3	1,005.5	18,495.7	135,154.9	13.68%
RU		1,244.8	2,804.3	2,362.6	697.2	2,765.4	1,222.2	2,976.6			23,364.8	14,966.1	52,404.0	525,830.3	9.97%
SRB				715.6		419.2	46.7	1,262.8	2,473.3		828.0	225.9	5,971.5	31,581.4	18.91%
TR	336.9	987.9	2,131.1	3,930.3	1,332.1	3,261.5	418.6	5,415.5	23,989.3	730.8		4,569.5	47,103.5	351,056.9	13.42%
UA	27.8	108.9	349.1	672.3	463.6	392.3	565.6	886.8	12,315.0	189.1	3,622.8		19,593.3	75,637.1	25.90%
BSEC Region Total Foreign Trade													191,271.3	1,303,747.0	14.67%

Table 4) Foreign Trade of the BSEC Countries in 2015(in million USD)

Source: National Statistics Institutes

The following table shows different foreign trade indicators of the BSEC region in the period 2008-2015, and percentage changes between periods. We can observe that there is 28.7% decrease in the foreign trade within BSEC countries, as well as 25.00% decrease in total BSEC foreign trade. This kind of decrease has been observed since the end of 2013 due to the political crisis that has arisen between Ukraine and Russia, which affected trade with other neighbourhood countries. However, from the observation of these two tables we can see considerable increase in the foreign trade of Ukraine comparing to Russia, where we observe decrease in the trade.

	2008	2009	2010	2011	2012	2013	2014	% change to previous period	2015	% change to previous period
Foreign Trade Within BSEC	251.37	179.16	242.43	314,33	306,65	300,78	268.30	-10.8%	191.27	-28.7%
Total BSEC Foreign Trade	1,413.11	1,075.80	1,256.57	1,768.75	1,757.63	1,792.39	1,739.03	-2.9%	1,303.75	-25.0%
Within BSEC/Total BSEC	17.79%	16.65%	19.29%	17.77%	17.45%	16.78%	16.68%			

Table 5) Foreign trade of the BSEC region in 2008-2015.

Based on the data presented in section 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 indications since 2003 until 2015 is presented in the table below.

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
BSEC Trade	100	139,9	175,9	220,3	289,7	325,8	232,3	314,2	407,4	397,5	390,0	374,5	247,9
Non-BSEC Trade	100	127,0	154,2	190,4	226,4	267,3	206,3	233,4	334,7	334,0	343,3	333,7	256,0
Total BSEC Trade	100	129,0	157,5	195,0	236,0	276,2	210,2	245,6	345,6	343,5	350,3	339,8	254,8

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