

## EIGHTH MEETING OF THE BSEC-URTA GENERAL ASSEMBLY

Jolly Alon Hotel, Chisinau - Moldova  
Monday, 24 October 2005, at 10:00 hrs

### BSEC OUTLOOK 2005 FIRST HALF: BSEC-URTA INTERNATIONAL ROAD TRANSPORT INDUSTRY PERFORMANCE REPORT

Collecting statistical data and analyzing 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 first half of 2005 in comparison with 2004.

#### I. INTERNATIONAL ROAD TRANSPORT INDUSTRY PERFORMANCE IN THE BSEC REGION IN THE FIRST HALF OF 2005

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

	TOTAL	AL	AR	AZ	B	GEO	GR	MD	RO	RUS	SCG	TR	UA	EU**	Others
<b>TOTAL</b>	<b>2.860.812</b>	<b>5.081</b>	<b>3.301</b>	<b>18.085</b>	<b>24.418</b>	<b>19.755</b>	<b>140.399</b>	<b>22.592</b>	<b>51.128</b>	<b>106.612</b>	<b>25.072</b>	<b>72.842</b>	<b>113.152</b>	<b>1.441.864</b>	<b>816.511</b>
AL	73.910			3	410		30.624	4	16		473	506		41.840	34
AR															
AZ	3.409				11	122	2		24	2.302		26	560	362	
B*	315.502	1.831	102	34		139	76.299	1.188	13.710	4.317	15.006	47.888	640	114.005	40.343
GEO	11.560		1.360	781	345		390	3	12	2.131		3.043	445	3.000	50
GR															
MD	62.645	53	23	6	2.325	37	2.850		8.481	19.862		4.941	2.875	17.044	4.148
RO	139.220	82	1	8	2.294	10	6.468	2.549		60	1.253	2.968	119	123.408	
RUS*	1.270.620	12	1.669	6.679	7.718	5.862	2.465	13.834	2.222		2.222	12.869	106.693	905.555	202.820
TR	833.835	3.102		8.784	10.940	13.403	20.981	1.218	25.694	12.786	5.412		1.820	166.339	563.356
UA	150.111	1	146	1.790	375	182	320	3.796	969	65.154	706	601		70.311	5.760

Table 1) Road transport operations in BSEC region in 2004

(\*) assuming 20 tons per truck (\*\*) excluding Greece

Note: data for Russia refers to the number of trips made from Russia by hauliers from all countries.

	TOTAL	AL	AR	AZ	B	GEO	GR	MD	RO	RUS	SCG	TR	UA	EU**	Others
<b>TOTAL</b>	<b>1.675.469</b>	<b>3.072</b>	<b>2.088</b>	<b>8.713</b>	<b>30.468</b>	<b>10.658</b>	<b>82.257</b>	<b>9.400</b>	<b>26.349</b>	<b>44.100</b>	<b>22.703</b>	<b>41.482</b>	<b>65.195</b>	<b>863.734</b>	<b>465.250</b>
AL	40.959				130		17.800		9		370	320		22.300	30
AR	0														
AZ	1.915				5	80	20	10	200	1.000		300	100	200	
B*	188.777	1.017	49	8		64	44.469	468	7.343	2.346	6.858	30.225	2.150	64.994	28.786
GEO	4.224		1.120	480	30		54			1.080		1.100	360		
GR															
MD	5.228	3	2	1	102	4	32		314	2.235	9	159	126	1.880	361
RO	246.974	69	10	22	18.483	32	9.196	61		178	10.128	799	8.354	190.830	8.812
RUS*	644.700	5	825	1.905	3.615	2.650	1.240	4.870	1.355		2.100	7.985	52.785	466.430	98.935
TR	470.800	1.976		5.443	7.855	7.737	9.296	823	16.713	4.678	2.904		1.320	87.241	324.814
UA	71.892	2	82	854	248	91	150	3.168	415	32.583	334	594		29.859	3.512

Table 2) Road transport operations in BSEC region in the first half of 2005

(\*) assuming 20 tons per truck (\*\*) excluding Greece

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Figures 1 and 2 show the total international trips in the BSEC region in 2004 and first half 2005, in three categories: trips within the BSEC region, trips to the EU except Greece, trips to the rest of the world.

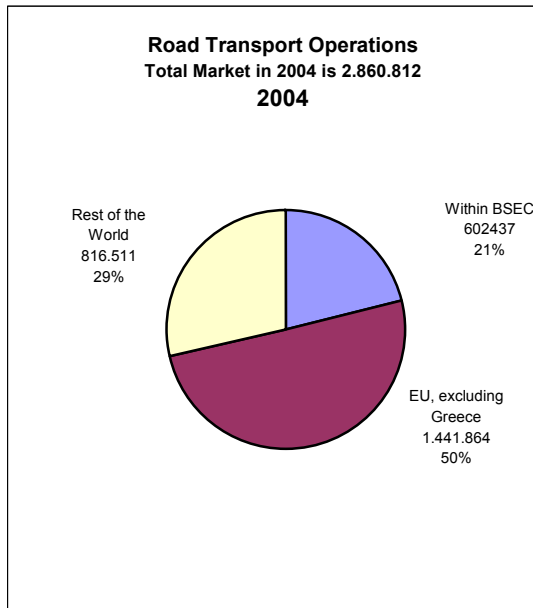


Fig. 1) International road transport trips by the BSEC hauliers in 2004.

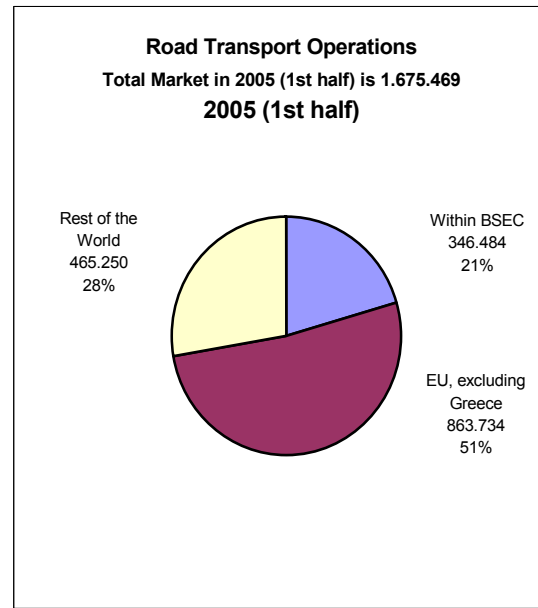


Fig. 2) International road transport trips by the BSEC hauliers in 2005 (1<sup>st</sup> half).

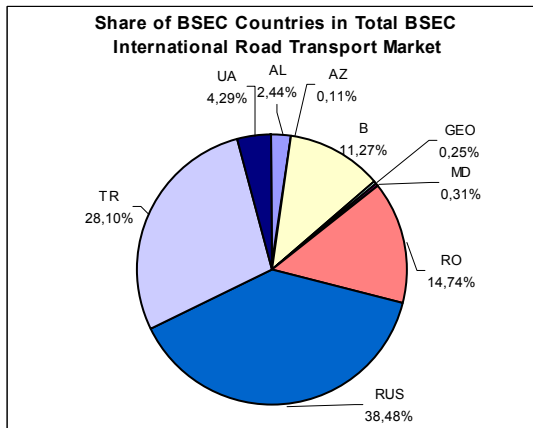


Fig. 3) Share of BSEC Countries (excluding AR and GR) in Total BSEC International Road Transport Market

Figure 3 shows the share between BSEC Countries in total International Road Transport Market of the BSEC Region. Since there were no data provided for Greece and Armenia, these countries are not included in the chart.

Table 3 shows the comparison of the situation at the BSEC International Road Transport Market in 2004 and in the 1<sup>st</sup> half 2005. The share of trips within BSEC in total trips of BSEC Countries has changed from 21,06% to 20,68%.

	2004	2005 (1 <sup>st</sup> half)	% to the previous period
Total number of trips	2.860.812	1.675.469	58,57%
Tips within BSEC	602.437	346.484	57,51%
Trips to EU	1.441.864	863.734	59,90%
Trips to Rest of the World	816.511	465.250	56,98%
BSEC/Total	21,06%	20,68%	

Table 3) Comparative table of the BSEC International Road Transport Market in 2004 and in the first half of 2005.

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**II. FOREIGN TRADE PERFORMANCE OF THE BSEC REGION**

Based on the data provided by National Statistics Institutes of BSEC Member States, the regional foreign trade performance in 2004 and 1<sup>st</sup> half 2005 is presented in tables below.

	AL	AR	AZ	B	GEO	GR	MD	RO	RUS	SCG	TR	UA	BSEC Total	World Total	BSEC /World %
AL				52,30		534,99		11,28		39,90	176,02		814,49	2.901,50	28,07
AR				57,77	42,19	29,72	2,14	34,26	237,58	0,65	65,00	91,20	560,52	2.073,61	27,03
AZ				54,89	203,35			90,33	779,18		407,59	182,61	1.717,95	7.131,43	24,09
B	40,19					1.066,65		816,65	1.944,24	396,14	1.855,19	658,23	6.777,28	24.276,12	27,92
GEO	0,12	79,86	183,05	54,43		21,82	1,88	15,31	362,32	1,79	320,90	157,69	1.199,17	2.496,07	48,04
GR	435,65	28,52	36,95	1.535,49	71,98		22,34	1.102,16	3.181,86	420,89	1.905,94	253,21	8.995,01	67.846,35	13,26
MD								263,40	569,70		81,70	501,20	1.416,00	2.760,50	51,30
RO														51.135,52	
RUS		208,40	757,10		336,70	1.429,20	868,60				8.673,10	16.867,70	29.140,80	257.122,00	11,33
SCG														15.731,40	
TR													22.146,76	160.660,72	13,78
UA	53,69	78,89	224,54	579,81	165,96	172,32	727,01	815,36	17.700,46	278,42	2.237,56		23.034,03	61.687,74	37,34
<b>BSEC-URTA Region Total Foreign Trade</b>														655.822,96	

Table 4.) Foreign Trade of the BSEC Countries in 2004 (in million USD)

	AL	AR	AZ	B	GEO	GR	MD	RO	RUS	SCG	TR	UA	BSEC Total	World Total	BSEC /World %
AL				32,40		227,05		8,60	40,00	22,25	94,69	40,05	465,04	1.526,89	30,46
AR				14,75	23,77	9,46	2,43	23,84	151,88	0,64	26,94	64,84	318,55	1.217,10	26,17
AZ				56,65	88,52	72,50		52,85	451,93		237,53	100,90	1.060,88	3.403,00	31,17
B	40,60					1.607,20		784,30	1.765,70	304,50	1.704,50	580,50	6.787,30	14.280,70	47,53
GEO	0,03	34,51	132,87	44,71		11,80	1,43	18,39	222,54	1,50	195,94	95,47	759,18	1.334,19	56,90
GR	201,76	12,30	22,33	835,48	37,21		4,21	465,67	2.085,30	133,18	963,72	150,74	4.911,91	33.568,30	14,63
MD								148,40	290,10		49,90	267,50	755,90	1.513,60	49,94
RO														32.345,40	
RUS		120,40	432,60		190,30	1.128,70	459,10				5.551,80	9.389,80	17.272,70	151.496,00	11,40
SCG															
TR	101,12		350,82	1.127,65	260,00	873,58	56,62	1.976,81	6.866,00	180,22		1.834,48	13.627,30	89.953,10	15,15
UA	28,45	51,95	141,15	285,99	93,54	92,83	367,10	348,63	9.318,86	170,33	1.345,47		12.244,30	17.749,86	68,98
<b>BSEC-URTA Region Total Foreign Trade</b>													58.203,07	348.388,14	

Table 5) Foreign Trade of the BSEC Countries in 2005 (1<sup>st</sup> half) (in million USD)

Source: National Statistics Institutes

The following table shows different foreign trade indicators of the BSEC region in 2003, 2004, 1<sup>st</sup> half 2005, and percentage relation between two subsequent periods. Since no comprehensive data were available for Romania and Serbia and Montenegro, the estimated value was taken into calculation.

	2003	2004	% change to previous period	2005 (1st half)	% weight to previous period
Foreign Trade Within BSEC	77,15	*104,36	35,27%	*63,43	60,78%
Total BSEC Foreign Trade	511,67	655,82	28,17%	*356,95	54,43%
World Foreign Trade	7682,34	9123,51	18,76%		
Within BSEC/Total BSEC	15,08%	15,91%		17,77%	

Table 6) Foreign trade of the BSEC region and its time change.

(\*) Estimated value

### III. WAITING TIMES AT BSEC BORDERS

Using the IRU's Border Waiting Times Observatory (BWTO) data, the BSEC-URTA International Secretariat analyzed the data related with the BSEC borders – internal and external – as available. This data is supplied to the IRU by its Member Associations.

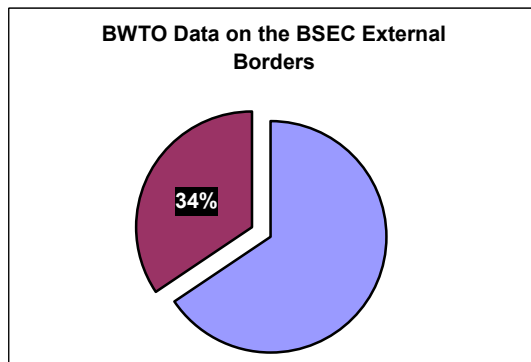
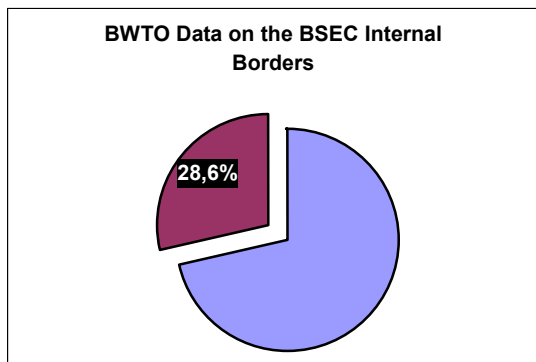


Fig. 4) BWTO Data on the BSEC Internal (6 out of 21) and External (10 out of 29) borders. Data for 1 more External border (SCG-HUN) became available.

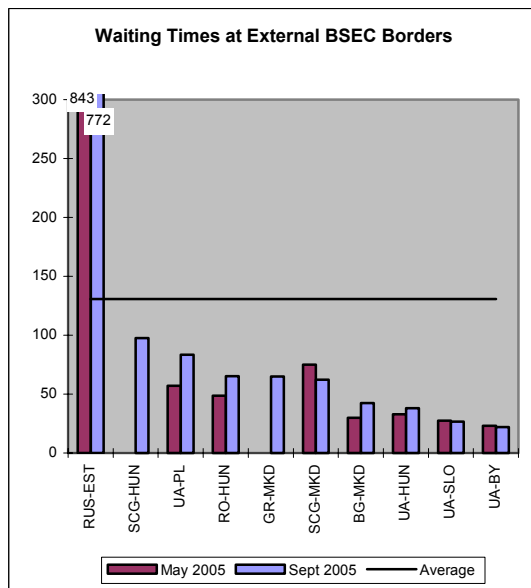
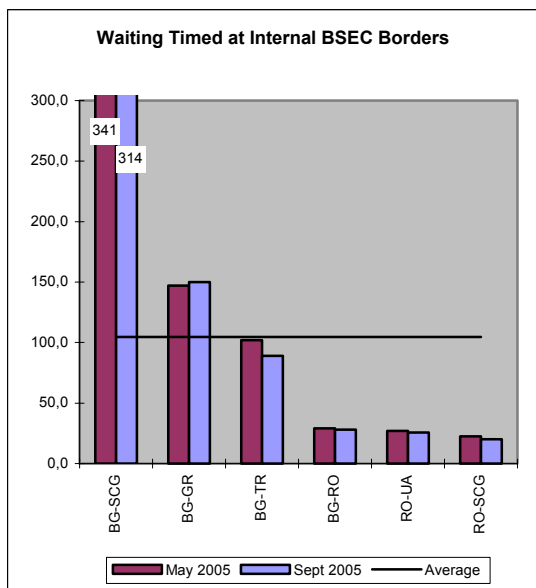
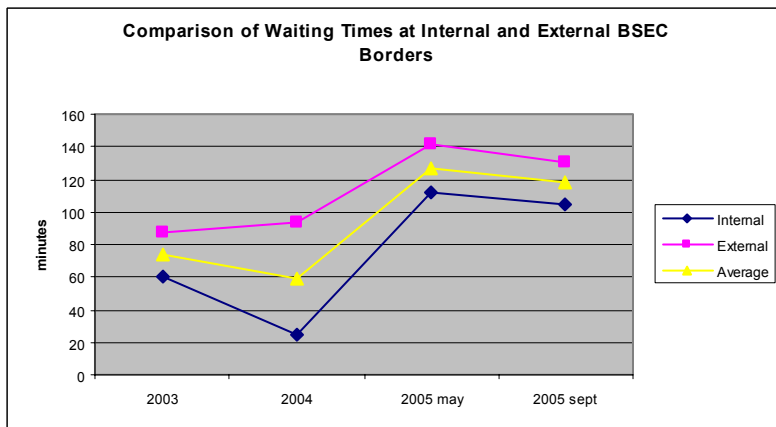


Fig. 5) Waiting times at Internal and External BSEC borders (averages of the period of January-May 2005 and January-September 2005). Horizontal line represents the average waiting time of the period January-September 2005, in general.



In average, waiting times at BSEC borders for the period January-September 2005 have decreased in comparison to the period January-May 2005 (see fig. 6).

Fig. 6) Comparison of waiting times at Internal and External BSEC borders, and their average.

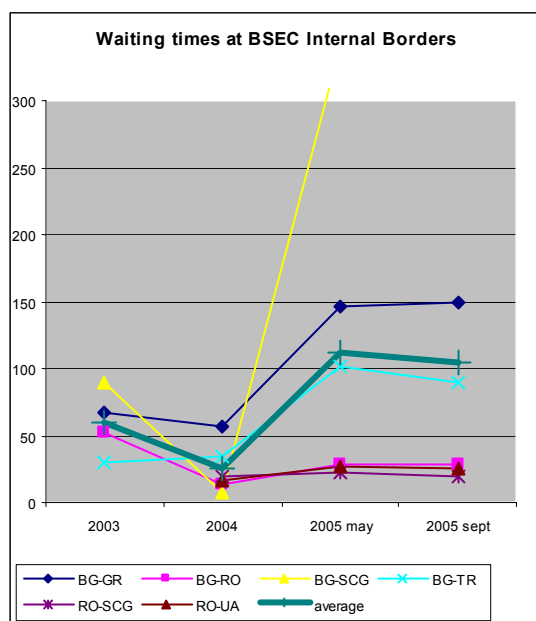
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### III.1 SITUATION AT BSEC INTERNAL BORDERS

Last data for the period January-September 2005, and its comparison to data of previous periods, is given in the following table and chart:

	2003	2004	% change to the previous period	Jan-May 2005	% change to the previous period	Jan-Sept 2005	% change to the previous period
BG-GR	67,0	56,5	-15,7%	147,0	160,2%	150,0	2,0%
BG-RO	52,0	14,0	-73,1%	29,0	107,1%	28,0	-3,4%
BG-SCG	90,0	7,0	92,7%	341,0	3871,4%	314,0	-7,9%
BG-TR	30,0	35,0	16,7%	102,0	191,4%	89,0	12,7%
RO-SCG		20,0		22,5	12,5%	20,0	-11,1%
RO-UA		17,0		27,0	58,8%	25,7	-4,8%
average	59,8	24,9	-58,3%	111,4	347,2%	104,5	-6,3%

Table 7) Waiting times at Internal BSEC Borders (in minutes) and percentage change.



Decreasing waiting times are observed at all borders except BG-TR border (12,7% increase) and BG-GR border (2,0% increase).

Situation at BG-SCG border is still a concern for the industry. The waiting times at this border are 3 times higher than average waiting time at Internal BSEC borders, though there is a tendency of decrease.

Fig. 7) Waiting times at Internal BSEC Borders

### III.2 SITUATION AT BSEC EXTERNAL BORDERS

	2003			2004			% change to the previous period	Jan-May 2005			% change to the previous period	Jan-Sept 2005			% change to the previous period
	Entering BSEC	Leaving BSEC	Average	Entering BSEC	Leaving BSEC	Average		Entering BSEC	Leaving BSEC	Average		Entering BSEC	Leaving BSEC	Average	
RUS-EST				241,0		241,0		843,0		843,0	249,8%	772,0		772,0	-8,4%
UA-BY				30,0	25,0	27,5		16,0	30,0	23,0	-16,4%	15,0	28,6	22,0	-4,3%
UA-PL	60,0		60,0	264,0	130,0	197,0	228,3%	81,0	34,0	57,0	-71,1%	119,0	48,0	83,5	46,5%
UA-HUN				180,0	15,0	97,5		50,0	17,0	33,0	-66,8%	59,0	16,0	38,0	15,2%
UA-SLO	300,0	45,0	172,5	93,0	38,0	65,5	-62,0%	27,0	28,0	27,5	-58,0%	26,0	27,0	26,5	-3,6%
RO-HUN	105,0	110,0	107,5	52,0	66,0	59,0	-45,1%	60,0	37,4	48,7	-17,5%	81,5	49,0	65,3	34,1%
SCG-MKD				60,0	60,0	60,0		90,0	60,0	75,0	25,0%	67,5	57,0	62,2	-13,1%
GR-MKD				60,0	67,0	63,5						70,0	60,0	65,0	
BG-MKD	10,0	10,0	10,0	30,0	30,0	30,0	200,0%	30,0		30,0	0,00%	40,0	45,0	42,5	41,7%
SCG-HUN												97,5		97,5	
Average	118,7	55,0	87,5	112,2	47,9	93,4	6,8%	149,6	34,4	142,2	52,1%	138,9	41,3	130,8	-8,0%

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

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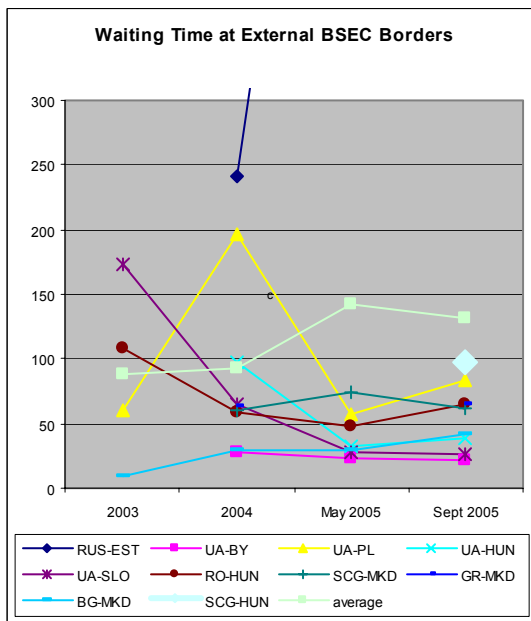


Fig. 8) Waiting times at External BSEC Borders (in minutes)

Table 8 and Figures 8-10 illustrate the situation at external BSEC borders. Decreasing time is observed at RUS-EST, UA-BY, UA-SLO, SCG-MKD borders and increasing time is observed at UA-PL, UA-HUN and RO-HUN borders. Waiting time at RUS-EST border when entering Russia is still very high.

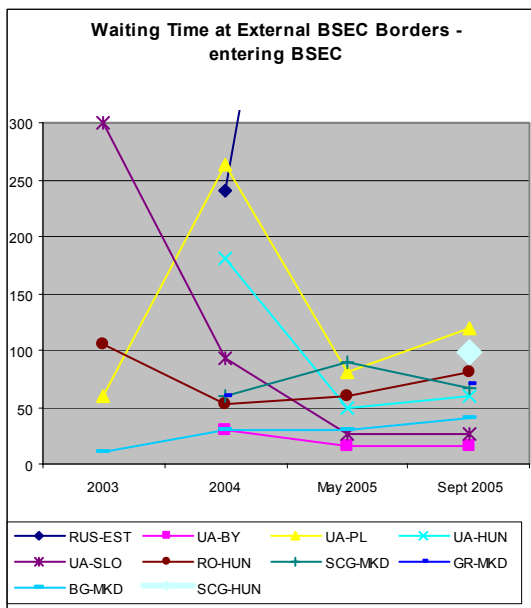


Fig. 9) Waiting times at External BSEC Borders - Entering BSEC

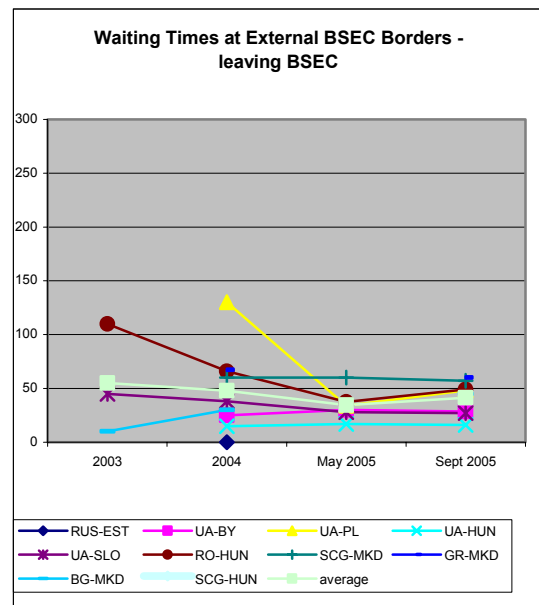


Fig. 10) Waiting times at External BSEC Borders – Leaving BSEC

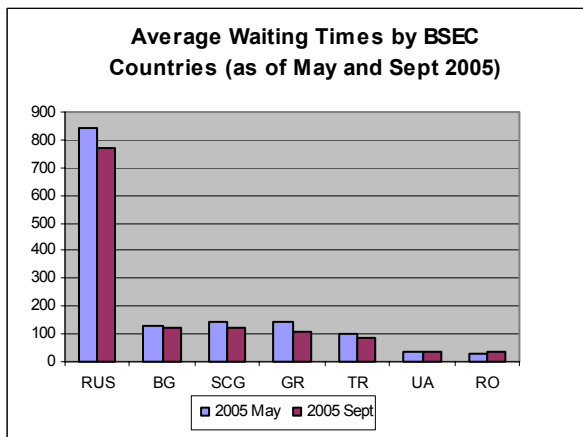


Figure 10 shows the average waiting times at borders by country for 7 BSEC countries, whose borders are covered (partially) by the BWTO, as of January-May 2005 and January-September 2005.

Fig. 10) Average waiting times by country.

#### IV. CORRELATION ANALYSIS BETWEEN TRADE AND WAITING TIMES AT BORDERS IN THE BSEC REGION

Based on data presented in section 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. Index for 2005 will be inserted as soon as the new yearly data will become available.

	2003	2004
<b>BSEC Trade</b>	100	137,2
<b>Internal Waiting Times</b>	100	41,7
<b>Non-BSEC Trade</b>	100	125,7
<b>External Waiting Times</b>	100	106,8
<b>Total BSEC Trade</b>	100	127,5
<b>Average Waiting Times</b>	100	80,4

Table 9) Correlation Analysis between Foreign Trade & Border Waiting Times in the BSEC region.

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