

## NINTH MEETING OF THE BSEC-URTA GENERAL ASSEMBLY

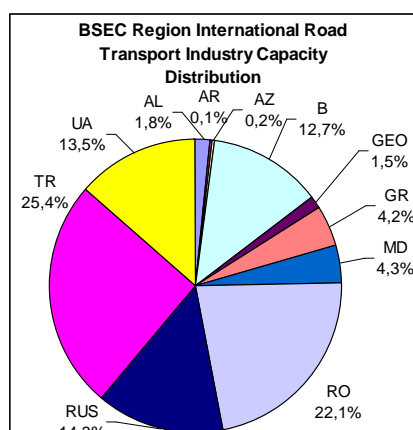
BSEC PERMIS, Istanbul - TURKEY  
Thursday, 11 May 2006, at 10:00 hrs

### BSEC OUTLOOK 2005: 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 2005 in comparison with previous years.

#### I. INTERNATIONAL ROAD TRANSPORT INDUSTRY PERFORMANCE IN THE BSEC REGION IN THE YEAR 2005

The capacity of the international road transport industry in the BSEC region is approximated by 142.000 trucks. Table 1 and figure 1 illustrate the distribution of the capacity, as reported by national associations.



	TOTAL	AL	AR	AZ	B	GEO	GR	MD	RO	RUS	TR	UA
#	141.851	2.500	120	346	17.950	2.122	6.000	6.074	31.350	20.224	36.000	19.165

Table 1) Number of trucks involved in international road transport in BSEC region (as reported by national associations).

Fig. 1) BSEC region international road transport industry capacity distribution among Member States (as reported by national associations).

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 2) 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.

**UNION OF ROAD TRANSPORT ASSOCIATIONS IN THE BLACK SEA ECONOMIC COOPERATION REGION (BSEC-URTA)**

	TOTAL	AL	AR	AZ	B	GEO	GR	MD	RO	RUS	SCG	TR	UA	EU**	Others
<b>TOTAL</b>	<b>3.368.627</b>	<b>6.307</b>	<b>5.404</b>	<b>19.683</b>	<b>58.131</b>	<b>27.397</b>	<b>168.004</b>	<b>21.343</b>	<b>66.495</b>	<b>111.825</b>	<b>27.737</b>	<b>99.230</b>	<b>144.008</b>	<b>1.656.614</b>	<b>956.448</b>
<b>AL</b>	<b>87.413</b>				270		35.012		11		736	410	4	50.840	130
<b>AR</b>															
<b>AZ</b>	<b>3.066</b>				5	111	21	10	209	1.410		333	240	727	
<b>B*</b>	<b>386.502</b>	2.408	111	16		157	86.522	1.204	17.617	5.002		59.152	4.169	136.726	73.418
<b>GEO</b>	<b>19.184</b>		2.352	1.354	75		698			1.720		3.950	750	7.854	431
<b>GR</b>															
<b>MD</b>	<b>75.921</b>	35	37	31	2.580	48	4.162		10.047	21.169	330	6.579	6.352	18.987	5.564
<b>RO</b>	<b>310.601</b>	108	16	30	28.177	42	14.891	2.971		260	15.640	3.330	12.579	219.031	13.526
<b>RUS*</b>	<b>1.374.445</b>	10	2655	4550	8275	10201	3607	9137	3814		4608	24087	116979	980051	206473
<b>TR</b>	<b>966.189</b>	3.744		11.783	18.333	16.594	22.780	1.518	33.848	12.487	5.736		2.936	187.506	648.924
<b>UA</b>	<b>145.306</b>	3	233	1.918	416	245	311	6.503	949	69.777	687	1.389		54.892	7.983

Table 3) Road transport operations in BSEC region in 2005  
 (\*) assuming 20 tons per truck (\*\*) excluding Greece

Figures 2 and 3 show the total international trips in the BSEC region in 2004 and 2005, in three categories: trips within the BSEC region, trips to the EU except Greece, trips to the rest of the world. Trips to EU constantly capsulate 50% of the total market while the number of trips within the BSEC region slightly increased by 1%.

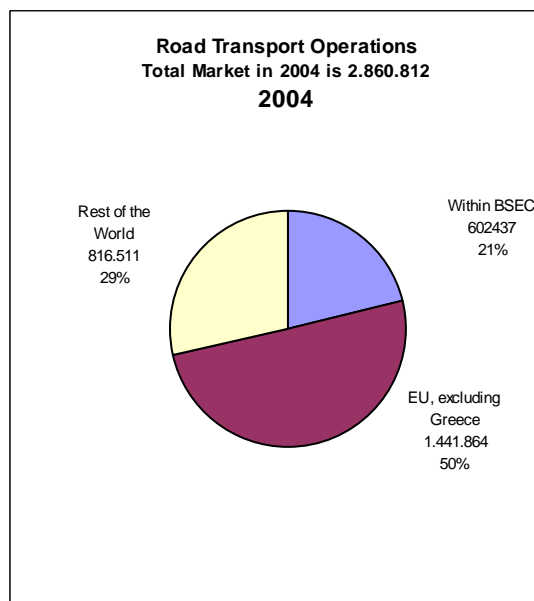


Fig. 2) International road transport trips by the BSEC hauliers in 2004.

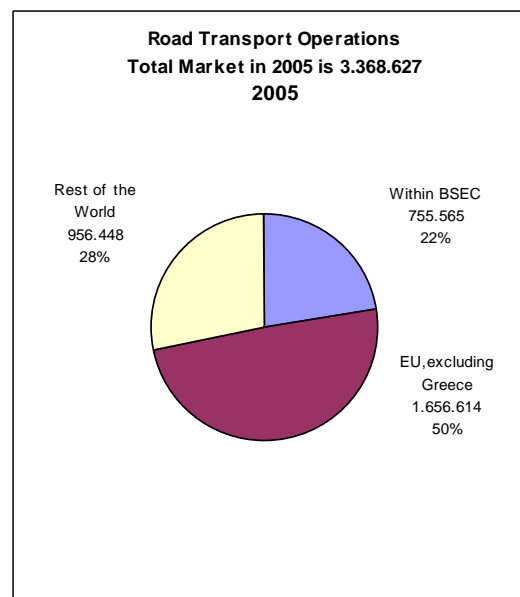


Fig. 3) International road transport trips by the BSEC hauliers in 2005.

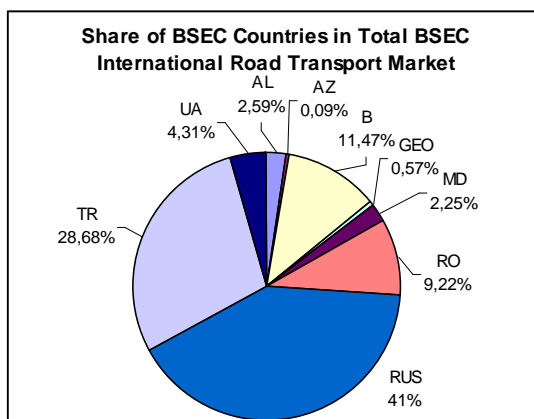


Fig. 4) Share of BSEC Countries (excluding AR and GR) in Total BSEC International Road Transport Market in 2005

Figure 4 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. Russia and Turkey are the largest transporters representing almost 70% of the BSEC International Road Transport Market.

Table 4 shows the comparison of the situation at the BSEC International Road Transport Market in 2004 and 2005. The share of trips within BSEC in total trips of BSEC Countries has changed from 21,06% to 22,43%.

**UNION OF ROAD TRANSPORT ASSOCIATIONS IN THE BLACK SEA ECONOMIC COOPERATION REGION  
(BSEC-URTA)**

	2004	2005	% change to the previous period
Total number of trips	2.860.812	3.368.627	17,75%
Trips within BSEC	602.437	755.565	25,42%
Trips to EU	1.441.864	1.656.614	14,89%
Trips to Rest of the World	816.511	956.448	17,14%
BSEC/Total	21,06%	22,43%	

Table 4) Comparative table of the BSEC International Road Transport Market in 2004 and 2005.

## 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 2005 is presented in tables below.

	AL	AR	AZ	B	GEO	GR	MD	RO	RUS	SCG	TR	UA	Total with BSEC	Total with World	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	20,00	2,00	171,00	800,00	78,00	1.069,00	282,00		2.350,00	284,00	3.008,00	965,00	9.029,00	56.149,00	16,08
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	16,51	0,48	0,30	281,77	2,95	318,54	4,14	324,65	1.548,87		260,50	320,30	3.079,01	14.840,00	20,75
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>													<b>107.942,75</b>	<b>659.945,04</b>	<b>16,36</b>

Table 5.) Foreign Trade of the BSEC Countries in 2004 (in million USD)

	AL	AR	AZ	B	GEO	GR	MD	RO	RUS	SCG	TR	UA	Total with BSEC	Total with World	BSEC /World%
AL				74,61		484,42		19,98	102,91	56,80	201,28	72,78	1.012,77	3.177,22	31,88
AR				28,10	57,68	26,16		75,54	352,91		65,52	137,77	743,68	2.718,28	27,36
AZ					208,44				1.002,45		588,31		1.799,19	8.546,90	21,05
B						2.033,35		1.130,37	3.020,58	440,33	2.348,76	782,03	9.755,42	30.150,90	32,36
GEO	0,02	79,22	316,87	115,12		29,01	4,26	49,45	538,28	2,11	404,82	257,09	1.796,23	3.357,60	53,50
GR														71.223,00	
MD		2,44	8,24	36,65	5,52	15,05		369,04	621,16	3,74	117,72	591,12	1.770,68	3.403,05	52,03
RO	17,00	6,00	120,00	1.129,00	168,00	1.055,00	411,00		3.569,00	423,00	4.163,00	692,00	11.753,00	68.193,00	17,23
RUS		292,50	1.063,80		505,80	2.116,40	996,30				12.592,00	20.177,50	37.744,30	339.857,40	11,11
SCG														15.129,00	
TR	207,30	0,39	797,63	2.367,51	572,85	1.848,46	112,19	4.064,23	15.231,14	353,34		3.450,21	29.005,24	189.627,00	15,30
UA	56,58	110,71	318,53	652,21	240,73	205,54	763,25	701,62	20.339,24	303,85	2.642,67		26.334,94	70.427,84	37,39
<b>BSEC-URTA Region Total Foreign Trade</b>														<b>805.811,19</b>	

Table 6) Foreign Trade of the BSEC Countries in 2005 (in million USD)

Source: National Statistics Institutes

The following table shows different foreign trade indicators of the BSEC region in 2003, 2004, 2005, and percentage relation between two subsequent periods. Foreign trade of BSEC countries as well as the share of foreign trade between BSEC countries constantly increases.

**UNION OF ROAD TRANSPORT ASSOCIATIONS IN THE BLACK SEA ECONOMIC COOPERATION REGION (BSEC-URTA)**

	2003	2004	% change to previous period	2005	% change to previous period
Foreign Trade Within BSEC	77,15	107,94	39,91%	*137,04	26,96%
Total BSEC Foreign Trade	511,67	659,94	28,98%	805,81	22,10%
World Foreign Trade	7.682,34	9.123,51	18,76%	10.393,00	13,91%
Within BSEC/Total BSEC	15,08%	16,36%		17,01%	

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. Analysis of the data for the year 2005 is presented below.

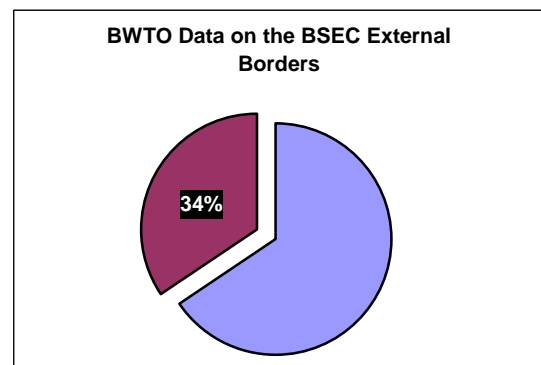
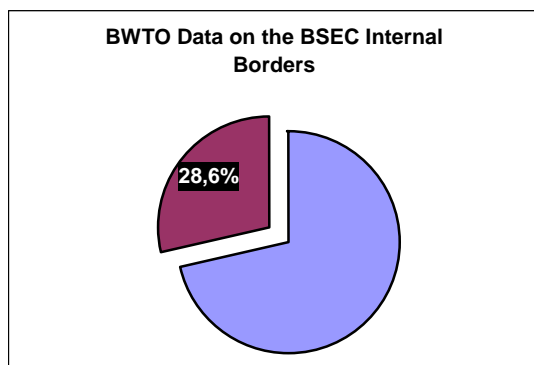


Fig. 5) BWTO Data on the BSEC Internal (6 out of 21) and External (10 out of 29) borders.

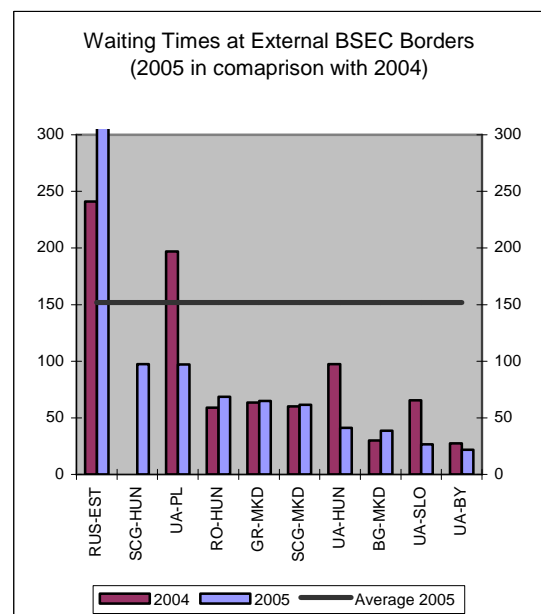
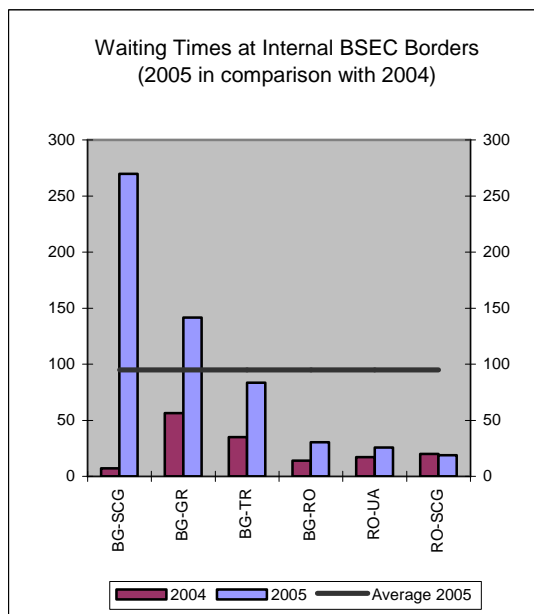
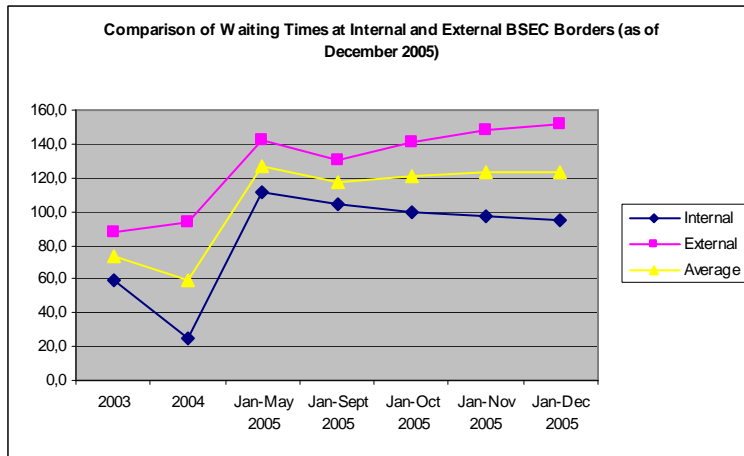


Fig. 6) Waiting times at Internal and External BSEC borders (averages of the year 2004 and 2005). Horizontal line represents the average waiting time in 2005, in general.

**UNION OF ROAD TRANSPORT ASSOCIATIONS IN THE BLACK SEA ECONOMIC COOPERATION REGION  
(BSEC-URTA)**



In average, waiting times at BSEC borders during the year 2005 have increased in comparison to the year 2004. In 2005, the major increase in waiting times occurred during the first five months, followed by the continuous decrease in internal waiting times and further increase in external waiting times.

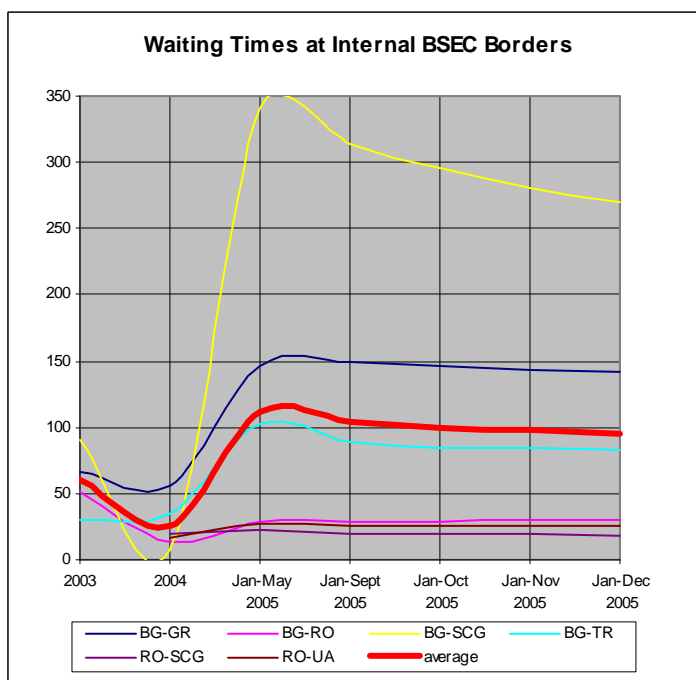
Fig. 7) Comparison of waiting times at Internal and External BSEC borders, and their average.

**SITUATION AT BSEC INTERNAL BORDERS**

Data for the year 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	Jan-Oct 2005	% change to the previous period	Jan-Nov 2005	% change to the previous period	Jan-Dec 2005	% change to the previous period	% change to 2004
BG-GR	67,0	56,5	-15,7%	147,0	160,2%	150,0	2,0%	145,7	-2,9%	143,5	-1,5%	141,6	-1,3%	150,5%
BG-RO	52,0	14,0	-73,1%	29,0	107,1%	28,0	-3,4%	28,6	2,1%	30,7	7,4%	30,4	-1,0%	117,3%
BG-SCG	90,0	7,0	-92,2%	341,0	4771,4%	314,0	-7,9%	295	-6,1%	281,0	-4,7%	269,9	-4,0%	3755,3%
BG-TR	30,0	35,0	16,7%	102,0	191,4%	89,0	-12,7%	85	-4,5%	83,7	-1,5%	83,4	-0,4%	138,4%
RO-SCG		20,0		22,5	12,5%	20,0	-11,1%	20	0,0%	20,0	0,0%	18,8	-6,3%	-6,3%
RO-UA		17,0		27,0	58,8%	25,7	-4,8%	25,6	-0,4%	25,6	0,1%	25,5	-0,5%	50,0%
Average	59,8	24,9	-58,3%	111,4	347,2%	104,5	-6,3%	100,0	-4,3%	97,4	-2,6%	94,9	-2,6%	280,9%

Table 8) Waiting times at Internal BSEC Borders (in minutes) and percentage change.



In 2004, the average decrease in waiting times is mainly motivated by the gradual decrease of waiting times at BG-SCG border (from 90 minutes to 7 minutes), as provided by BWTO. In 2005, waiting times at internal BSEC borders showed a decreasing tendency. By the end of the year 2005, the average waiting time at internal borders reached 94.9 minutes. There are two borders above the average, namely BG-GR and BR-SCG. Situation at BG-SCG border is still a concern for the industry. The waiting times at this border by the end of the year 2005 are almost 3 times higher than average, though there is a continuous tendency of decrease.

Fig. 8) Waiting times at Internal BSEC Borders

**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	Jan-Oct 2005			% change to the previous period	Jan-Nov 2005			% change to the previous period	Jan-Dec 2005			% change to the previous period	% change to 2004	
	in BSEC	out BSEC	Ave	in BSEC	out BSEC	Ave		in BSEC	out BSEC	Ave		in BSEC	out BSEC	Ave		in BSEC	out BSEC	Ave		in BSEC	out BSEC	Ave		in BSEC	out BSEC	Ave			in BSEC
RUS-EST				241,0	0,0	241,0		843,0	n/a	843,0	249,8%	772,0	n/a	772,0	-8,4%	912,8		912,8	18,2%	977,2		977,2	7,1%	998,6		998,6	2,2%	314,0%	
UA-BY				30,0	25,0	27,5		16,0	30,0	23,0	-16,4%	15,0	28,6	22,0	-4,3%	15,1	28,7	22,0	0,0%	15,0	28,4	21,7	-1,3%	15,0	28,4	21,7	0,0%	-21,1%	
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%	125,6	33,0	79,3	-5,1%	135,7	33,2	84,4	6,5%	160,4	33,9	97,1	15,0%	-50,7%	
UA-HUN				180,0	15,0	97,5		50,0	17,0	33,0	-66,2%	59,0	16,0	38,0	15,2%	60,3	19,5	39,9	5,0%	60,5	19,3	39,9	0,1%	62,0	20,6	41,3	3,5%	-57,6%	
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%	26,0	27,0	26,5	0,0%	26,2	27,04	26,6	0,5%	26,2	27,04	26,6	0,0%	-59,4%	
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%	81,5	49,0	65,2	-0,1%	83,5	55,4	69,4	6,4%	82,8	54,6	68,7	-1,1%	16,4%	
SCG-MKD				60,0	60,0	60,0		90,0	60,0	75,0	25,0%	67,5	57,0	62,2	-17,1%	66,0	57,0	61,5	-1,1%	66,0	57,0	61,5	0,0%	66,0	57,0	61,5	0,0%	2,5%	
GR-MKD				60,0	67,0	63,5						70,0	60,0	65,0		70,0	60,0	65,0	0,0%	70,0	60,0	65,0	0,0%	70,0	60,0	65,0	0,0%	2,0%	
BG-MKD	10,0	10,0	10,0	30,0	30,0	30,0	200,0%	30,0		30,0	0,0%	40,0	45,0	42,5	41,7%	37,5	40,0	38,8	-8,8%	37,5	40,0	38,8	0,0%	37,5	40,0	38,8	0,0%	2,9%	
SCG-HUN												97,5		97,5		97,5		97,5		97,5		97,5		97,5		97,5		0,0%	
Average	118,8	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%	149,2	39,3	140,8	7,7%	163,5	46,4	148,2	5,2%	168,7	46,6	151,7	2,3%	62,0%	

Table 9.) Waiting times at External BSEC Borders (in minutes).

**UNION OF ROAD TRANSPORT ASSOCIATIONS IN THE BLACK SEA ECONOMIC COOPERATION REGION (BSEC-URTA)**

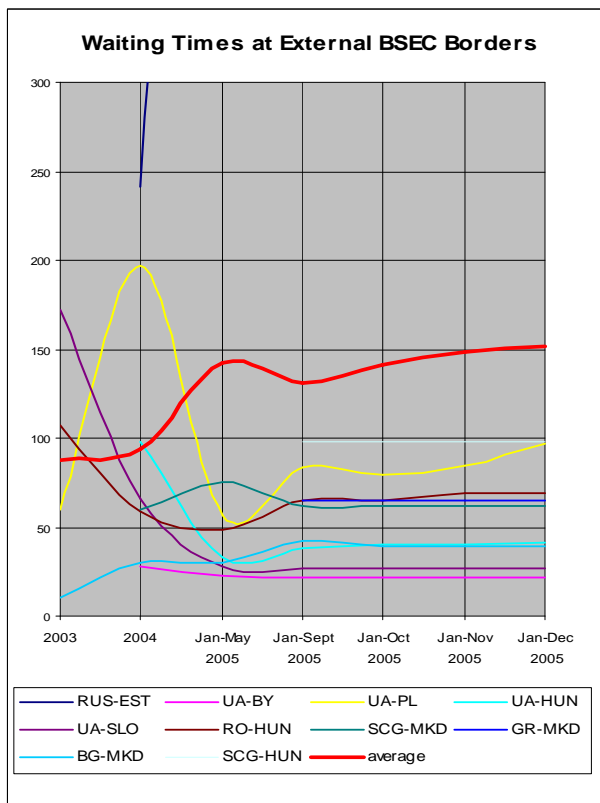


Table 9 and Figures 9-11 illustrate the situation at external BSEC borders. There is a noticeable difference between waiting times when entering and leaving the BSEC region: waiting times when entering the BSEC region are 3.62 times higher than waiting times when leaving the BSEC region, by the end of the year 2005. The major influence on this indicator is caused by the RUS-EST border waiting times, which are extremely high: by the end of the year 2005 they are reached 998.6 minutes.

Fig. 9) Waiting times at External BSEC Borders (in minutes)

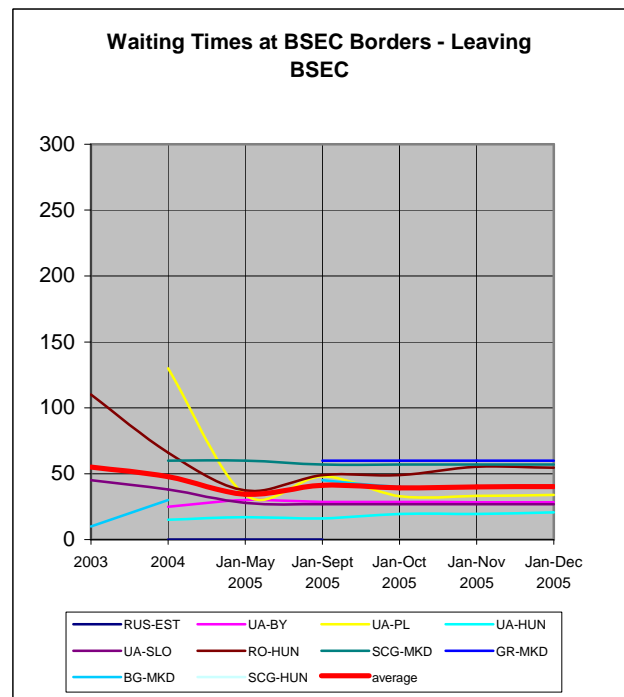
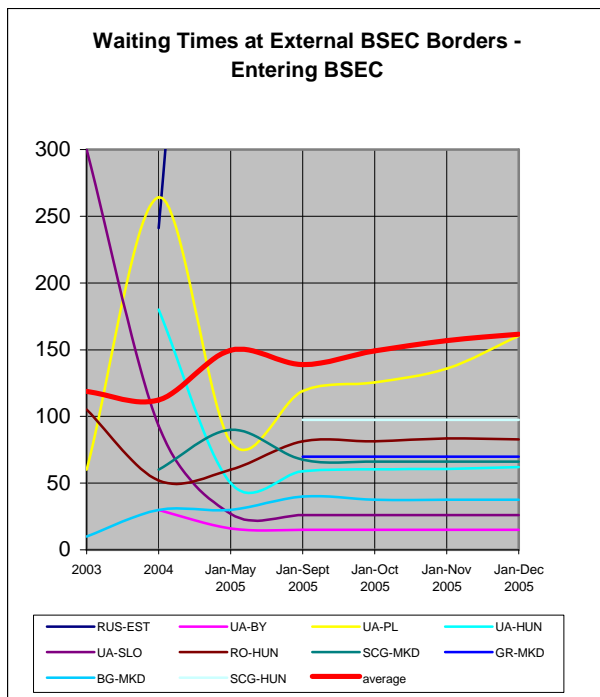


Fig. 10) Waiting times at External BSEC Borders - Entering BSEC

Fig. 11) Waiting times at External BSEC Borders – Leaving BSEC

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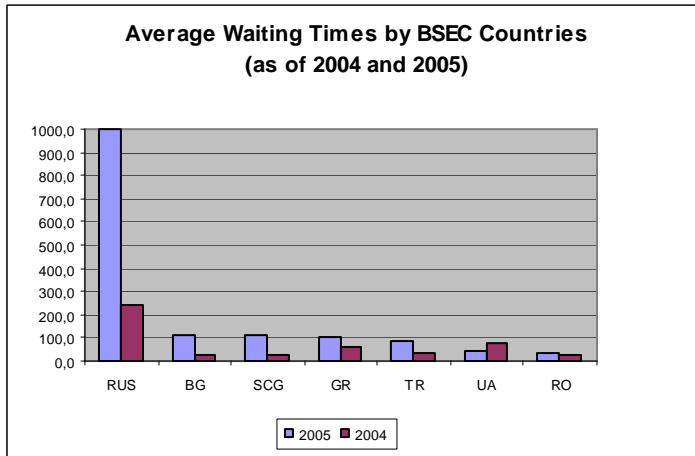


Figure 12 shows the average waiting times at borders by country for 7 BSEC countries, whose borders are covered (partially) by the BWTO, as of 2004 and 2005. Waiting times at borders of all mentioned BSEC countries have increased except Ukraine.

Fig. 12) 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.

	2003	2004	2005
<b>BSEC Trade</b>	100	139,9	177,6
<b>Internal Waiting Times</b>	100	41,7	158,8
<b>Non-BSEC Trade</b>	100	127,0	153,9
<b>External Waiting Times</b>	100	106,8	173,4
<b>Total BSEC Trade</b>	100	129,0	157,5
<b>Average Waiting Times</b>	100	80,4	167,5

Table 10) Correlation Analysis between Foreign Trade & Border Waiting Times in the BSEC region.

Figures for 2005 in comparison to 2004, as presented in the table 10, indicate a correlation between the volume of foreign trade and border waiting times: trade growth is accompanied with the growth in border waiting times.

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