

TENTH MEETING OF THE BSEC-URTA GENERAL ASSEMBLY

Marmara Antalya Hotel, Antalya - TURKEY
Friday, 24 November 2006, at 09:00 hrs

BSEC OUTLOOK 2006 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 2006 in comparison with the same period of 2005 and previous years.

I. INTERNATIONAL ROAD TRANSPORT INDUSTRY PERFORMANCE IN THE BSEC REGION IN THE FIRST HALF OF 2006

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
TOTAL*	1.702.669	3.082	2.094	8.720	31.403	10.675	83.851	9.400	30.291	51.119	22.838	43.749	67.095	871.964	466.388
AL	40.959				130		17.800		9		370	320		22.300	30
AR															
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*	32.428	13	8	8	1.037	21	1.626		4.256	9.254	144	2.426	2.026	10.110	1.499
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 1) Road transport operations in BSEC region in the first half of 2005

(*) updated figure (**) excluding Greece (***) assuming 20 tons per truck

	TOTAL	AL	AR	AZ	B	GEO	GR	MD	RO	RUS	SCG	TR	UA	EU**	Others
TOTAL															
AL	47.360				320		18.730		10		720	230		25.930	1.420
AR															
AZ	3.647					50		1	25	1.504		53	148	430	1.436
B															
GEO	10.063		70	1.498	120		407	14	99	1.210		2.320	475	3.850	
GR															
MD	35.739	8	3	13	1.323	11	2.043		5.464	9.502	218	3.814	2.736	8.674	1.930
RO	216.553	114	3	6	2.739	16	13.975	2.415		243	11.788	2.366	10.397	163.381	9.110
RUS*	679.950		850	1.050	3.750	2.650	2.250	6.150	2.150		2.800	10.900	56.700	486.750	103.950
TR	376.773	1.698		5.860	9.316	7.740	11.498	1.194	19.982	5.322	3.847		998	109.405	199.913
UA	70.590	2	142	1.160	234	163	150	3.267	534	33.744	437	941		25.056	4.760

Table 2) Road transport operations in BSEC region in the first half of 2006

(*) assuming 20 tons per truck, preliminary information (**) excluding Greece

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Figures 1 and 2 show the total international trips in the BSEC region in first half 2005 and first half 2006, in three categories: trips within the BSEC region, trips to the EU except Greece, trips to the rest of the world. Data for Bulgaria and Russia was not provided for the 1st half of 2006 therefore estimated figures are given.

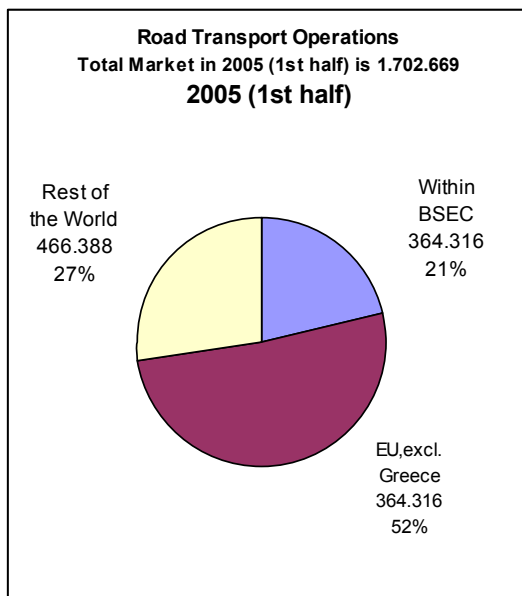


Fig. 1) International road transport trips by the BSEC hauliers in 2005 (1st half).

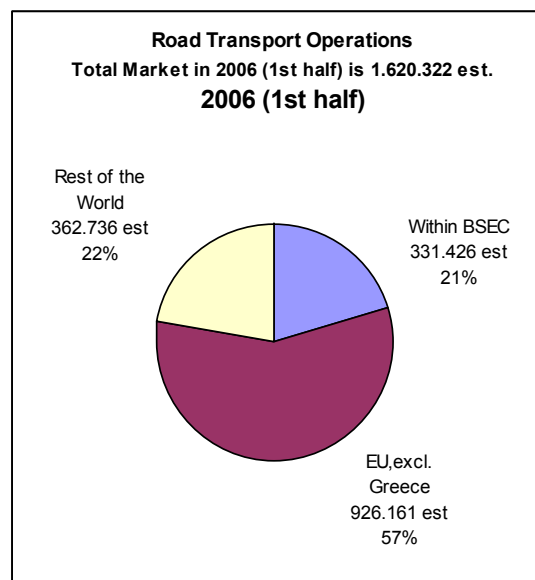


Fig. 2) International road transport trips by the BSEC hauliers in 2006 (1st half) – estimated figures.

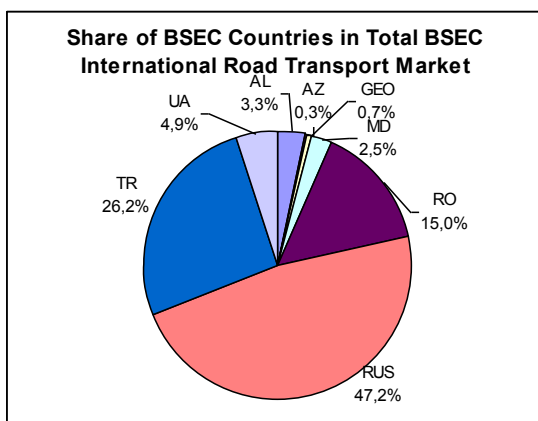


Fig. 3) Share of BSEC Countries (excluding AR, BG, GR) in Total BSEC International Road Transport Market

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 Armenia, Bulgaria and Greece, 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, 2005 and in the 1st half 2006. Table 4 shows the comparison of data for the 1st half 2005 and the 1st half 2006. Decrease of 4,84% in total number of trips is observed in 2006.

	2004	2005	% change to the previous period	2006 (1 st half)*	% to the previous period
Total number of trips	2.860.812	3.368.627	17,75%	1.620.322	48,10%
Tips within BSEC	602.437	755.565	25,42%	331.426	43,86%
Trips to EU except Greece	1.441.864	1.656.614	14,89%	926.161	55,91%
Trips to Rest of the World	816.511	956.448	17,14%	362.736	37,92%
BSEC/Total	21,06%	22,43%		20,45%	

Table 3) Comparative table of the BSEC International Road Transport Market in 2004, 2005 and in the first half of 2006.

(*) Estimated figure.

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	2005 (1 st half)	2006 (1 st half)*	% change to the previous period
Total number of trips	1.702.669	1.620.322	-4,84%
Trips within BSEC	364.316	331.426	-9,03%
Trips to EU except Greece	871.964	926.161	6,22%
Trips to Rest of the World	466.388	362.736	-22,22%
BSEC/Total	21,40%	20,45%	

Table 4) Comparative table of the BSEC International Road Transport Market in the first half of 2005 and in the first half of 2006.
(*) Estimated figure.

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 the 1st half 2005 and 1st half 2006 is presented in tables below.

	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
BSEC-URTA Region Total Foreign Trade													58.203,07	348.388,14	

Table 5) Foreign Trade of the BSEC Countries in 2005 (1st half) (in million USD)
Source: National Statistics Institutes

	AL	AR	AZ	B	GEO	GR	MD	RO	RUS	SCG	TR	UA	BSEC Total	World Total	BSEC /World %
AL				48,59		271,84		27,45	54,20		118,78	76,85	597,72	1.928,55	30,99
AR				13,80	43,96	24,51		37,66	180,24		40,46	88,56	429,19	1.388,90	30,90
AZ					121,83			79,64	622,38		329,92	101,91	1.255,68	5.041,70	24,91
B	48,38				60,17	1.186,23		689,02	1.966,77	319,47	1.414,88	363,56	6.048,48	17.344,71	34,87
GEO	4,10	55,40	167,69	91,34		10,89	2,09	20,46	324,10	6,01	243,73	149,96	1.075,77	2.050,58	52,46
GR	226,47	9,85	18,05	1.069,29	58,32		10,35	602,72	2.378,21	191,10	1.275,15	174,57	6.014,08	40.539,60	14,84
MD	0,23	1,31	1,14	19,00	2,82	6,55		202,92	302,51	2,85	64,72	278,90	882,95	1.630,47	54,15
RO	19,94	5,66	98,66	661,71	126,18	572,56	216,78		2.305,51	294,26	2.241,79	465,03	7.008,08	38.292,57	18,30
RUS		200,20	703,60		304,40	1.306,30	424,40				7.590,90	10.827,60	21.357,40	199.722,50	10,69
SCG				227,40		171,30		262,00	1.107,80		140,90	179,10	2.088,50	8.301,60	25,16
TR	93,04		424,77	1.396,80	325,99	1.425,11	61,33	2.178,01	9.322,86	122,87		1.939,73	17.290,51	105.221,83	16,43
UA	51,93	67,88	182,00	309,26	146,21	95,30	345,15	440,73	10.131,66	140,96	1.485,00		13.396,08	37.645,81	35,58
BSEC-URTA Region Total Foreign Trade													77.444,43	459.108,83	16,87

Table 6) Foreign Trade of the BSEC Countries in 2006 (1st half) (in million USD)
Source: National Statistics Institutes

The following table shows different foreign trade indicators of the BSEC region in 2003, 2004, 2005, 1st half 2006, and percentage relation between two subsequent periods.

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	2003	2004	% change to previous period	2005	% change to previous period	2006 (1st half)	% weight to previous period
Foreign Trade Within BSEC	77,15	107,94	39,91%	135,71	25,72%	77,44	57,07%
Total BSEC Foreign Trade	511,67	659,94	28,98%	805,62	22,08%	459,11	56,99%
World Foreign Trade	7682,34	9.123,51	18,76%	10.393,00	13,91%		
Within BSEC/Total BSEC	15,08%	16,36%		16,84%		16,87%	

Table 7) Foreign trade of the BSEC region and its time change (2003-2005 and 1st half 2006).

	2005 (1st half)	2006 (1st half)	% change to previous period
Foreign Trade Within BSEC	*63,43	77,44	22,09%
Total BSEC Foreign Trade	*356,95	459,11	28,62%
Within BSEC/Total BSEC	17,77%	16,87%	

Table 8) Foreign trade of the BSEC region and its time change (1st half 2005 and 1st half 2006).

(*) 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.

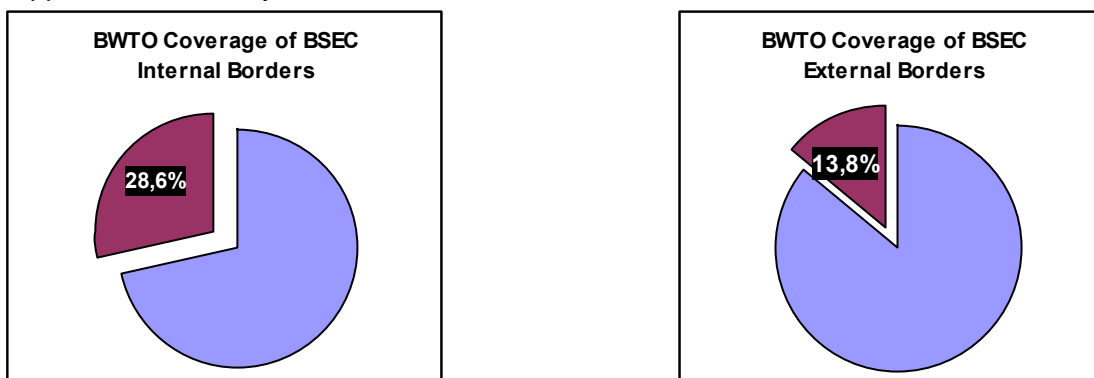


Fig. 4) BWTO Data on the BSEC Internal (6 out of 21) and External (4 out of 29) borders. Since 2005, continuity of receiving data from 6 external border crossing points was disturbed.

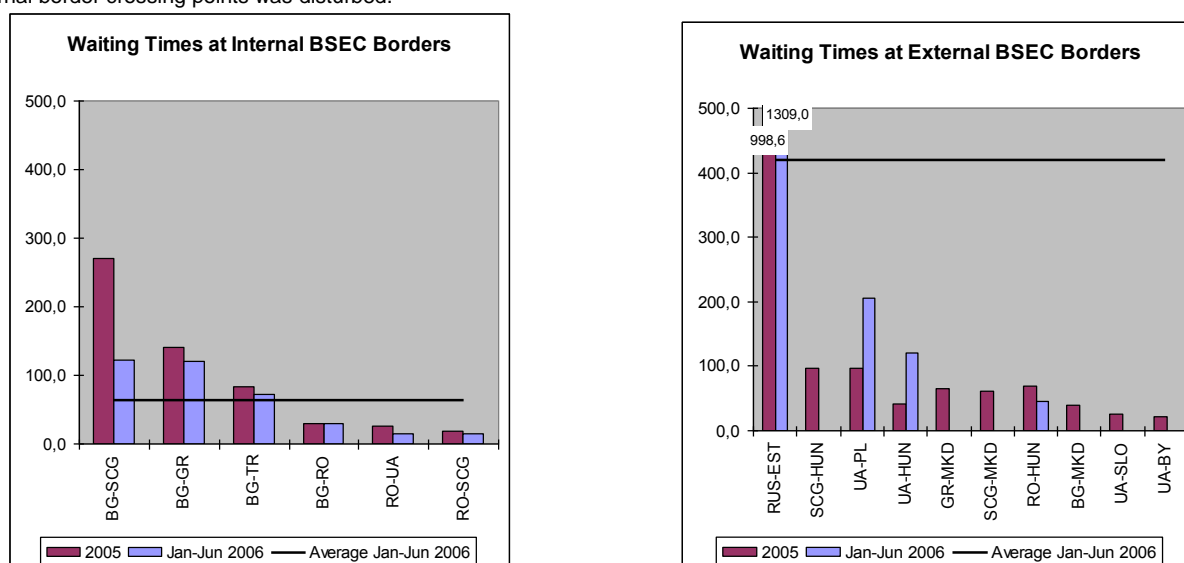
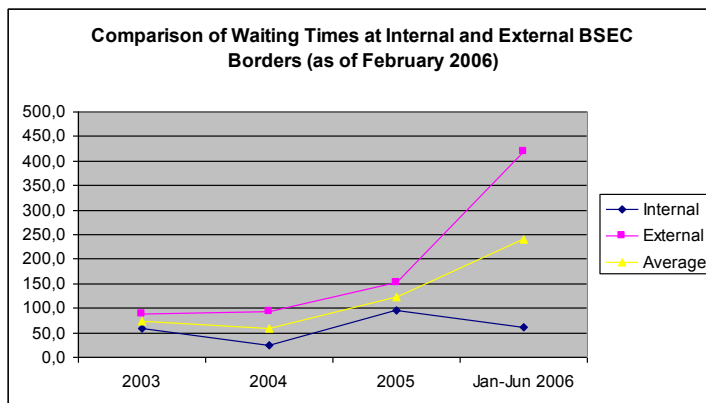


Fig. 5) Waiting times at Internal and External BSEC borders (averages of the period of the year 2005 and January-June 2006). Horizontal line represents the average waiting time of the period January-June 2006, in general.

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In average, waiting times at BSEC borders for the period January-June 2006 have increased in comparison to the situation at the end of 2005 (see fig. 6) which is mostly influenced by huge increase of 176,7% in waiting times at external BSEC borders.

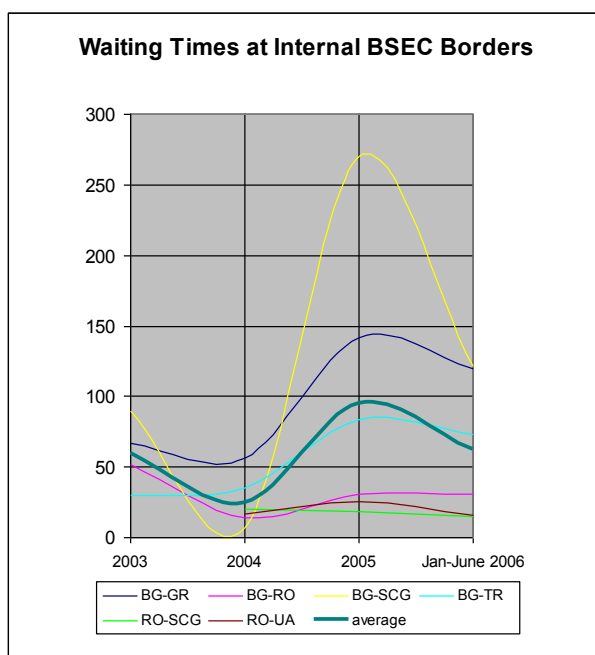
Fig. 6) Comparison of waiting times at Internal and External BSEC borders, and their average.

III.1 SITUATION AT BSEC INTERNAL BORDERS

Semi-annual data for 2006 and its comparison to data of previous periods, is given in the following table and chart:

	2003	2004	% change to the previous period	2005	% change to the previous period	Jan-June 2006	% change to the previous period
BG-GR	67,0	56,5	-15,7%	141,6	150,5%	120,0	-15,2%
BG-RO	52,0	14,0	-73,1%	30,4	117,3%	30,5	0,3%
BG-SCG	90,0	7,0	92,7%	269,9	3755,3%	121,3	-55,1%
BG-TR	30,0	35,0	16,7%	83,4	138,4%	72,9	-12,7%
RO-SCG		20,0		18,8	-6,3%	15,0	-20,0%
RO-UA		17,0		25,5	50,0%	15,4	-39,5%
average	59,8	24,9	-58,3%	94,9	280,9%	62,5	-34,1%

Table 9) Waiting times at Internal BSEC Borders (in minutes) and percentage change.



Notable decrease in waiting times, from 12,7% at BG-TR border to 55,1% at BG-SCG border, is observed resulting to average decrease of 34,1% of waiting times at internal BSEC borders.

Fig. 7) Waiting times at Internal BSEC Borders

III.2 SITUATION AT BSEC EXTERNAL BORDERS

	2003			2004			% change to the previous period	2005			% change to the previous period	Jan-Jun 2006			% 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		998,6		998,6	314,0%	1309,0		1309,0	31,1%
UA-BY				30,0	25,0	27,5		15,0	28,4	21,7	-21,1%				
UA-PL	60,0		60,0	264,0	130,0	197,0	228,3%	160,4	33,9	97,1	-50,7%	205,2		205,2	111,3%
UA-HUN				180,0	15,0	97,5		62,0	20,6	41,3	-57,6%	120,0		120,0	190,6%
UA-SLO	300,0	45,0	172,5	93,0	38,0	65,5	-62,0%	26,2	27,0	26,6	59,4%				
RO-HUN	105,0	110,0	107,5	52,0	66,0	59,0	-45,1%	82,8	54,6	68,7	16,4%	56,5	33,6	45,1	-34,3%
SCG-MKD				60,0	60,0	60,0		66,0	57,0	61,5	2,5%				
GR-MKD				60,0	67,0	63,5		70,0	60,0	65,0	2,0%				
BG-MKD	10,0	10,0	10,0	30,0	30,0	30,0	200,0%	37,5	40,0	38,8	2,9%				
SCG-HUN								97,5		97,5					
Average	118,7	55,0	87,5	112,2	47,9	93,4	6,8%	161,6	40,2	151,7	62,0%	422,7	33,6	419,8	176,7%

Table 10.) Waiting times at External BSEC Borders (in minutes).

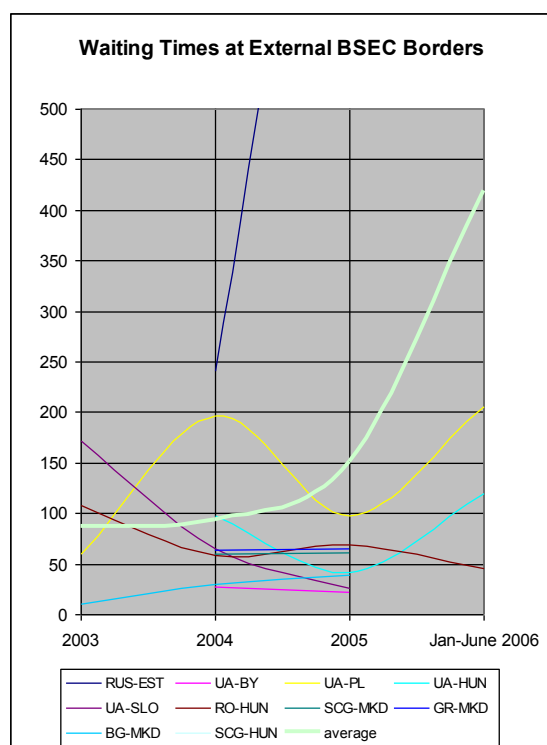


Fig. 8) Waiting times at External BSEC Borders (in minutes)

Table 10 and Figures 8-10 illustrate the situation at external BSEC borders. Due to the lack of data for most border crossing points there is a huge dispersion between average values in 2005 and 1st half of 2006.

Figures 9 and 10 give insight of the situation at external BSEC borders when entering or leaving the region.

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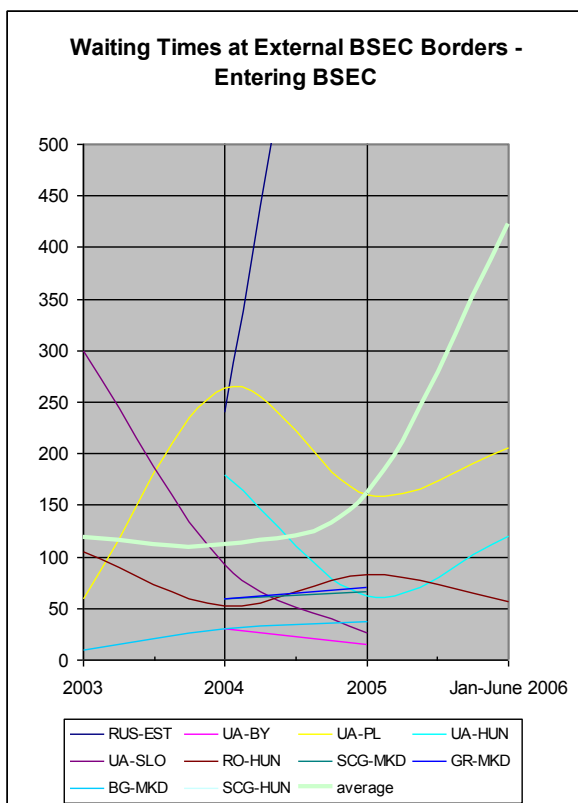


Fig. 9) Waiting times at External BSEC Borders - Entering BSEC

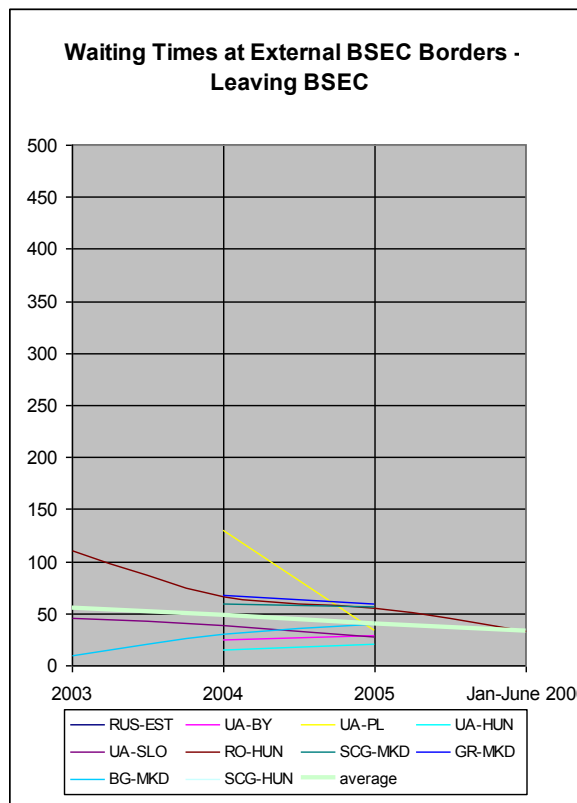


Fig. 10) Waiting times at External BSEC Borders – Leaving BSEC

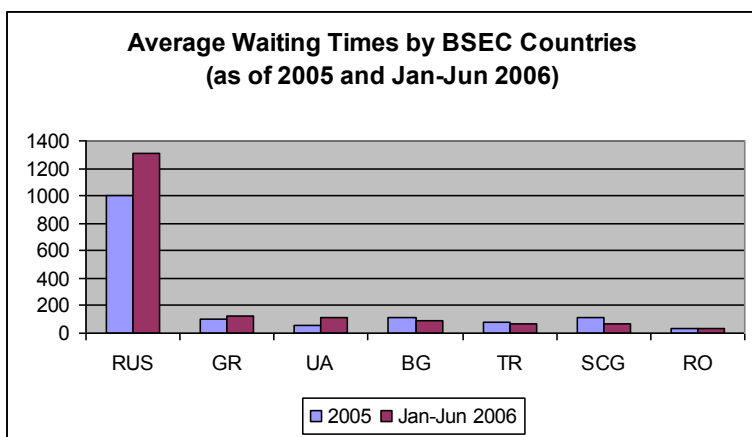


Fig. 11) Average waiting times by country.

Figure 11 shows the average waiting times at borders by country for 7 BSEC countries, whose borders are covered (partially) by the BWTO, as of the end of 2005 and January-June 2006.

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 2006 will be inserted as soon as the new yearly data will become available.



UNION OF ROAD TRANSPORT ASSOCIATIONS IN THE BLACK SEA ECONOMIC COOPERATION REGION
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	2003	2004	2005
BSEC Trade	100	139,9	*175.9
Internal Waiting Times	100	41,7	158.8
Non-BSEC Trade	100	127,0	*154.2
External Waiting Times	100	106,8	173.4
Total BSEC Trade	100	129,0	*157.5
Average Waiting Times	100	80,4	167.5

Table 11) Correlation Analysis between Foreign Trade & Border Waiting Times in the BSEC region.
(*) Corrected index.

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