

ОДИННАДЦАТОЕ СОБРАНИЕ ГЕНЕРАЛЬНОЙ АССАМБЛЕИ BSEC-URTA

Intercontinental Hotel, Белград – СЕРБИЯ
Пятница, 20 апреля 2007г., в 10:00

ОБЗОР СИТУАЦИИ В РЕГИОНЕ ЧЭС В 2006г.: ОТЧЕТ BSEC-URTA О РЕЗУЛЬТАТАХ В МЕЖДУНАРОДНОЙ АВТОТРАНСПОРТНОЙ ОТРАСЛИ

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 2006 in comparison with previous years.

I. INTERNATIONAL ROAD TRANSPORT INDUSTRY PERFORMANCE IN THE BSEC REGION IN THE YEAR 2006

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

	TOTAL	AL	AR	AZ	BG	GE	GR	MD	RO	RU	XS	TR	UA	EU24	Others
TOTAL	3.368.627	6.307	5.404	19.683	58.131	27.397	168.004	21.343	66.495	111.825	27.737	99.230	144.008	1.656.614	956.448
AL	87.413				270		35.012		11		736	410	4	50.840	130
AR															
AZ	3.066				5	111	21	10	209	1.410		333	240	727	
BG*	386.502	2.408	111	16		157	86.522	1.204	17.617	5.002		59.152	4.169	136.726	73.418
GE	19.184		2.352	1.354	75		698			1.720		3.950	750	7.854	431
GR															
MD	75.921	35	37	31	2.580	48	4.162		10.047	21.169	330	6.579	6.352	18.987	5.564
RO	310.601	108	16	30	28.177	42	14.891	2.971		260	15.640	3.330	12.579	219.031	13.526
RU*	1.374.445	10	2655	4550	8275	10201	3607	9137	3814		4608	24087	116979	980051	206473
TR	966.189	3.744		11.783	18.333	16.594	22.780	1.518	33.848	12.487	5.736		2.936	187.506	648.924
UA	145.306	3	233	1.918	416	245	311	6.503	949	69.777	687	1.389		54.892	7.983

Table 1) Road transport operations in BSEC region in 2005
(* assuming 20 tons per truck)

	TOTAL	AL	AR	AZ	BG	GE	GR	MD	RO	RU	XS	TR	UA	EU24	Others
TOTAL	2.606.919	7.702	4.441	19.454	29.790	23.726	193.292	11.767	81.480	104.512	41.353	69.683	33.325	1.240.076	746.318
AL	64.600				60		45.000		30		2.500	480		16.500	30
AR	956					100	2	4		600			200	50	
AZ	6.422					4		4	52	1.113		153	371	1.425	3.300
BG**	420.825	2.955	170	22		149	92.333	1.889	25.228	5.836	18.138	59.381	3.942	150.071	60.712
GE	14.813		2.865	1.353	30		1.500	25	10	700		3.850	980	3.500	
GR															
MD	108.336	31	24	25	3.378	30	6.567		16.853	42.746	843	9.396	10.478	17.032	933
RO	247.631	114	3	6	*3.132	16	13.975	*2.761		243	11.788	*2.705	10.397	193.381	9.110
RU**	1.269.065		1.870	3.443	3.795	6.051	2.672	6.344	2.910		3.509	13.439	69.491	962.072	193.472
XS	358.104	1.288	1	0	5.358	91	14.745	14	15.612	4.070		1.598	1.831	141.868	171.628
TR	756.135	3.342		13.401	23.674	19.547	24.956	2.160	38.590	15.139	7.185		2.813	205.824	399.504
UA	156.915	3	382	2.280	623	418	359	7.477	1.199	76.811	1.033	1.682		52.136	12.512

Table 2) Road transport operations in BSEC region in 2006
(* estimated value (** assuming 20 tons per truck)

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(BSEC-URTA)**

Figures 1 and 2 show the total international trips in the BSEC region in 2005 and 2006, in three categories: trips within the BSEC region, trips to the EU24 (EU countries except BG, GR, RO), trips to the rest of the world. Trips to EU24 constantly capsulate half of the total market while the number of trips within the BSEC region increased by 2%.

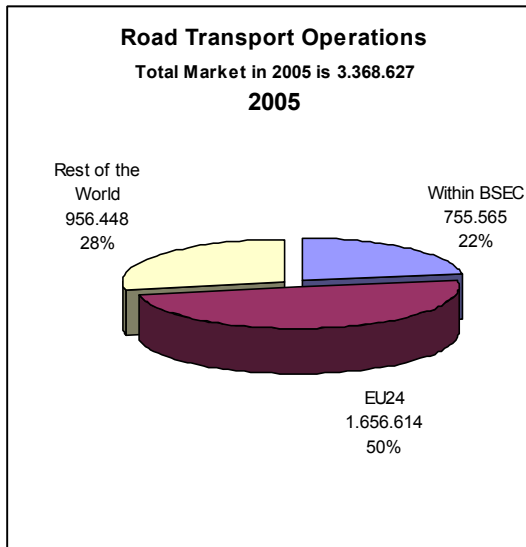


Fig. 1) International road transport trips by the BSEC hauliers in 2005.

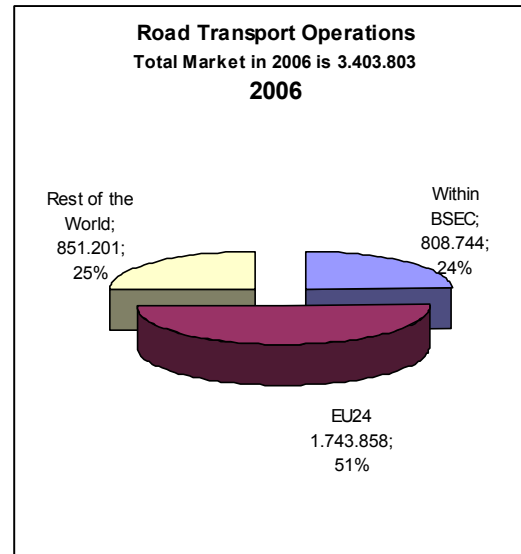


Fig. 2) International road transport trips by the BSEC hauliers in 2006.

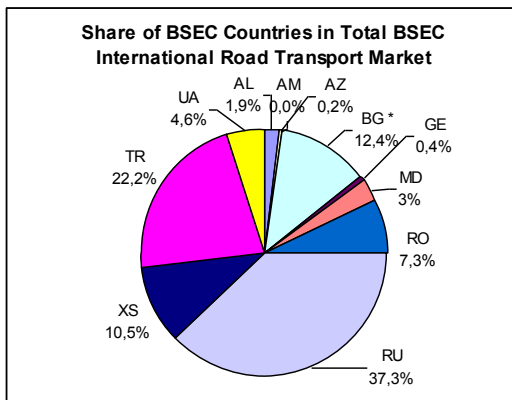


Fig. 3) Share of BSEC Countries (excluding GR) in the whole BSEC international road transport market in 2006.

Figure 3 shows the share between BSEC Countries in the whole international road transport market of the BSEC Region. Since there were no data provided for Greece, it is not included in the chart. Russia, Turkey and Bulgaria are three the largest transporters representing more than 70% of the BSEC International Road Transport Market.

Table 3 shows the comparison of the situation at the BSEC international road transport market in 2004, 2005 and 2006. In 2006, total number of trips has decreased by 9,61% compared with 2005 for the same set of countries. In general, trips of the BSEC hauliers in 2006 were more concentrated within the BSEC region in comparison with the previous years.

	(*) 2004	(*) 2005	% change to the previous period	(*) 2006	% change to the previous period	(**) 2006
Total number of trips	2.860.812	3.368.627	17,75%	3.044.743	-9,61%	3.403.803
Trips within BSEC	602.437	755.565	25,42%	763.230	1,01%	808.744
Trips to EU24	1.441.864	1.656.614	14,89%	1.601.940	-3,30%	1.743.858
Trips to Rest of the World	816.511	956.448	17,14%	679.573	-28,95%	851.201
BSEC Trips/Total Trips	21,06%	22,43%		25,07%		23,76%

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

(*) Partial cover of the BSEC region (doesn't include AM, GR, XS)

(**) Covers whole region except GR.

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(BSEC-URTA)**

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 2005 and 2006 is presented in the tables below.

	AL	AR	AZ	BG	GE	GR	MD	RO	RU	XS	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
BG						2.033,35		1.130,37	3.020,58	440,33	2.348,76	782,03	9.755,42	30.150,90	32,36
GE	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	456,24	32,27	38,98	1.743,54	56,75		13,87	1.047,57	4.555,61	216,81	2.072,39	258,43	10.492,45	71.223,00	14,73
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
RU		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
XS				295,90		278,50		404,40	1.893,90		261,60	363,20	3.497,50	14.943,10	23,41
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
BSEC-URTA Region Total Foreign Trade													135.705,39	805.625,29	16,84

Table 4.) Foreign Trade of the BSEC Countries in 2005 (in million USD)

	AL	AR	AZ	BG	GE	GR	MD	RO	RU	XS	TR	UA	Total with BSEC	Total with World	BSEC /World%
AL			0,78	103,09	15,00	587,26	5,09	53,80	112,36	44,09	253,30	81,61	1.256,38	3.840,32	32,72
AR				42,89	89,77	52,03		83,83	426,55		97,72	187,37	980,15	3.198,30	30,65
AZ					285,23	181,98			1.216,22		773,18	317,39	2.774,00	11.637,21	23,84
BG	99,93				137,58	2.484,70		1.495,46	4.208,46	735,03	3.116,32	823,74	13.101,24	38.279,08	34,23
GE	5,17	113,96	410,84	177,84		28,37	3,74	46,42	637,39	13,02	647,94	377,05	2.461,74	4.674,28	52,67
GR	510,40	23,22	76,18	2.296,04	82,82		33,17	1.374,71	4.991,01	391,19	2.728,34	354,38	12.861,47	84.212,93	15,27
MD	0,69	2,36	6,61	49,20	4,41	22,61		501,51	599,03	6,95	142,28	645,24	1.980,89	3.744,76	52,90
RO	32,21	7,65	104,70	1.397,49	207,40	1.240,15	562,81		4.408,65		5.025,33	1.131,11	14.117,50	83.581,84	16,89
RU*		491,11	1.662,72		655,52	3.092,06	962,43				16.999,20	23.869,98	47.733,01	438.538,68	10,88
XS				571,17		352,29		610,96	2.451,87		293,56	410,53	4.690,38	19.534,88	24,01
TR	226,09	0,04	1.027,18	3.202,88	752,71	2.641,25	136,11	4.980,37	20.740,06	338,31		4.145,15	38.190,16	222.600,16	17,16
UA	90,46	148,56	462,98	726,14	384,75	198,23	793,64	1.071,96	22.437,92	322,37	3.159,12		29.796,12	83.402,20	35,73
BSEC-URTA Region Total Foreign Trade													169.943,04	997.244,64	17,04

Table 5) Foreign Trade of the BSEC Countries in 2006 (in million USD)

Source: National Statistics Institutes

(*) Estimated value

The following table shows different foreign trade indicators of the BSEC region in 2003-2006, and percentage changes between two subsequent periods. Foreign trade of BSEC countries as well as the share of foreign trade between BSEC countries in the whole foreign trade of BSEC countries constantly increase and reach at 17 % in 2006.

	2003	2004	% change to previous period	2005	% change to previous period	2006	% change to previous period
Foreign Trade Within BSEC	77,15	107,94	39,91%	135,71	25,72%	169,94	25,23%
Total BSEC Foreign Trade	511,67	659,94	28,98%	805,62	22,08%	997,24	23,79%
World Foreign Trade	7.682,34	9.123,51	18,76%	10.393,00	13,91%		
Within BSEC/Total BSEC	15,08%	16,36%		16,84%		17,04%	

Table 6) Foreign trade of the BSEC region since 2003.

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 2006 is presented below.

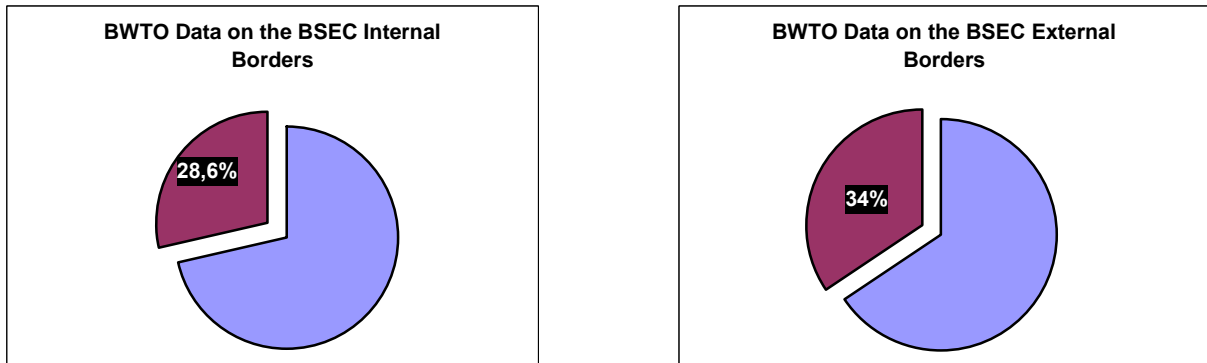


Fig. 4) BWTO Data on the BSEC Internal (6 out of 21) and External (10 out of 29) borders.

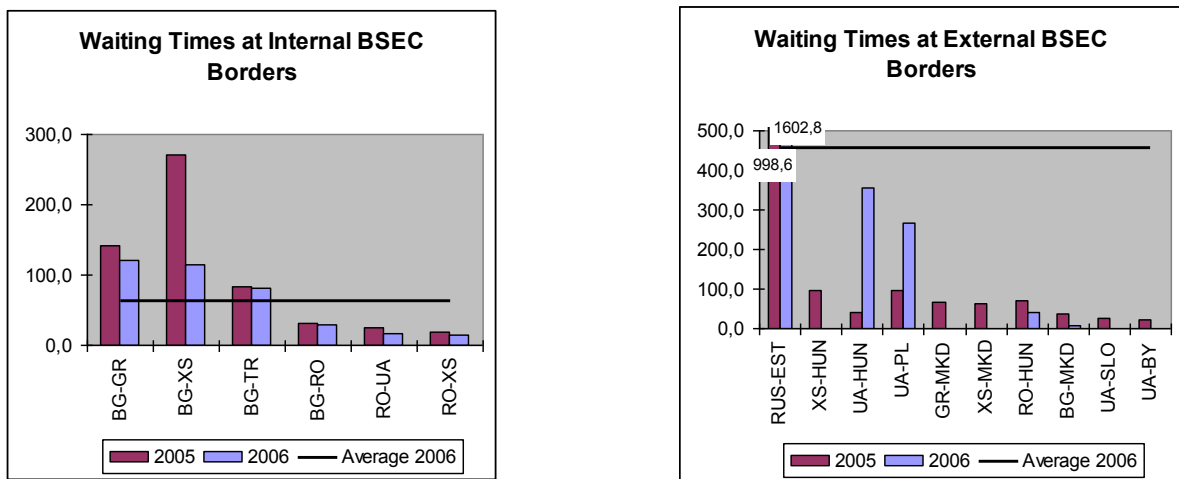


Fig. 5) Waiting times at Internal and External BSEC borders (averages of the year 2005 and 2006). Horizontal line represents the average waiting time in 2006, in general.

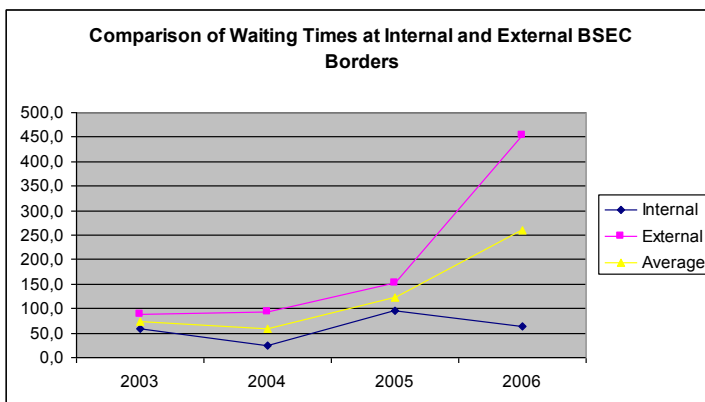


Fig. 6) Comparison of waiting times at Internal and External BSEC borders, and their average.

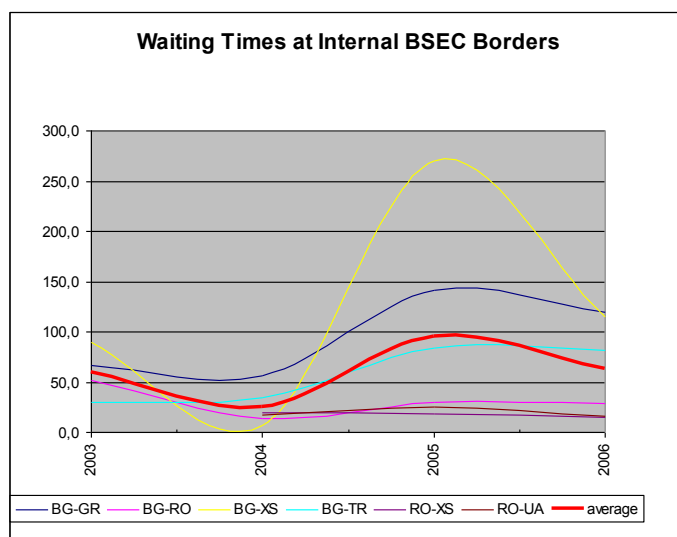
In average, waiting times at BSEC borders during the year 2006 have increased in comparison to the year 2005.

SITUATION AT BSEC INTERNAL BORDERS

An analysis of 2006 data with comparison to the previous years, is given in the following table and chart:

	2003	2004	% change to the previous period	2005	% change to the previous period	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%	28,7	-5,7%
BG-XS	90,0	7,0	-92,2%	269,9	3755,3%	115,3	-57,3%
BG-TR	30,0	35,0	16,7%	83,4	138,4%	81,6	-2,2%
RO-XS		20,0		18,8	-6,3%	15,0	-20,0%
RO-UA		17,0		25,5	50,0%	15,9	-37,8%
average	59,8	24,9	-58,3%	94,9	280,9%	62,7	-33,9%

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



In 2006, a general decrease is observed about the waiting times, which is mainly thanks to the gradual decrease of waiting times at the BG-XS border (from 269,9 minutes to 115,3 minutes), as provided by BWTO.

In 2006, waiting times are observed to decrease, gradually, at all internal BSEC borders. By the end of 2006, the average waiting time at the internal borders decreased by one third to 62.7 minutes in comparison with 2005.

Fig. 7) Waiting times at Internal BSEC Borders

SITUATION AT BSEC EXTERNAL BORDERS

	2003			2004			% change to the previous period	2005			% change to the previous period	2006			% change to the previous period
	in BSEC	out BSEC	average	in BSEC	out BSEC	average		in BSEC	out BSEC	average		in BSEC	out BSEC	average	
RUS-EST				241,0	0,0	241,0		998,6		998,6	314,3%	1602,8		1602,8	60,5%
UA-BY				30,0	25,0	27,5		15,0	28,4	21,7	-21,0%				
UA-PL	60,0		60,0	264,0	130,0	197,0	228,3%	160,4	33,9	97,1	-50,7%	297,8	233,2	265,5	173,3%
UA-HUN				180,0	15,0	97,5		62,0	20,6	41,3	-57,6%	355,0		355,0	759,4%
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%	53,9	30,0	42,0	-38,9%
XS-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	2,4%				
BG-MKD	10,0	10,0	10,0	30,0	30,0	30,0	200,0%	37,5	40,0	38,8	29,2%	7,0	7,0	7,0	-81,9%
XS-HUN								97,5		97,5					
average	118,75	55,0	87,5	112,2	47,9	93,4	6,8%	161,6	40,2	151,7	62,3%	463,3	90,1	454,5	199,6%

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

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

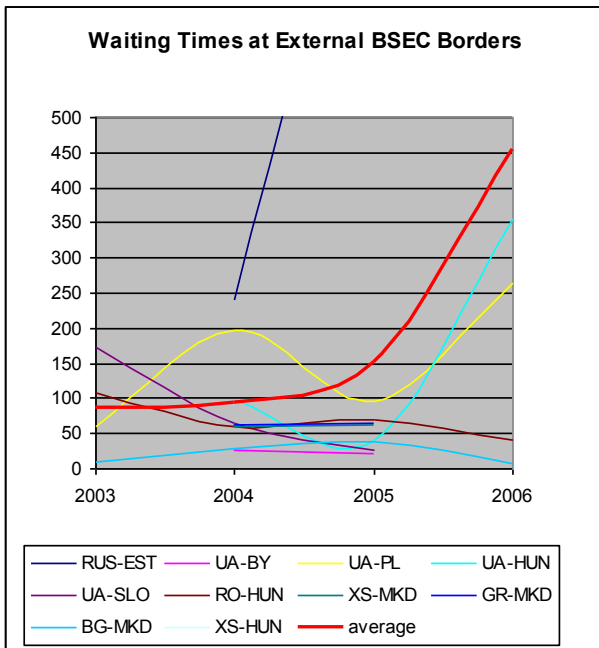


Table 9 and Figures 8-10 illustrate the situation at external BSEC borders. There is a big difference between the average waiting times at the internal and external borders. Furthermore, it is noteworthy that average waiting times while entering the BSEC region are five times higher than the waiting times when leaving the BSEC region!

The main reason of such a big difference is due to the extremely high waiting times recorded at the RUS-EST border, which increased by 1.6 times in 2006 and reached at 1602.8 minutes in average.

Another warning appears at the UA-HUN border, where waiting times increased by 759.4% by the end of 2006!

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

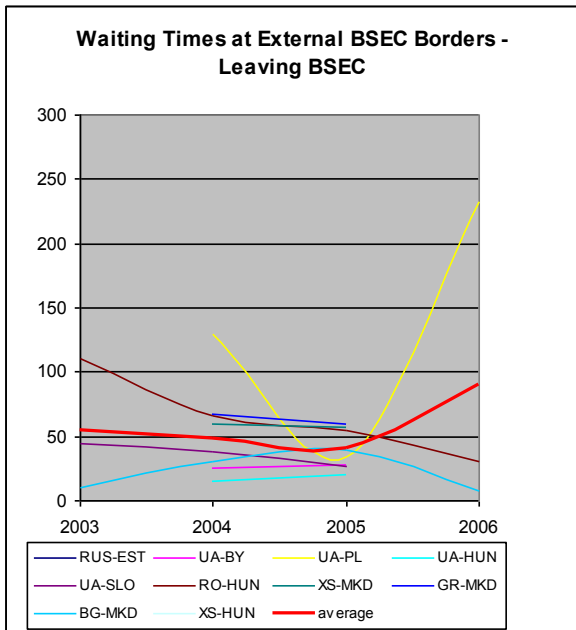
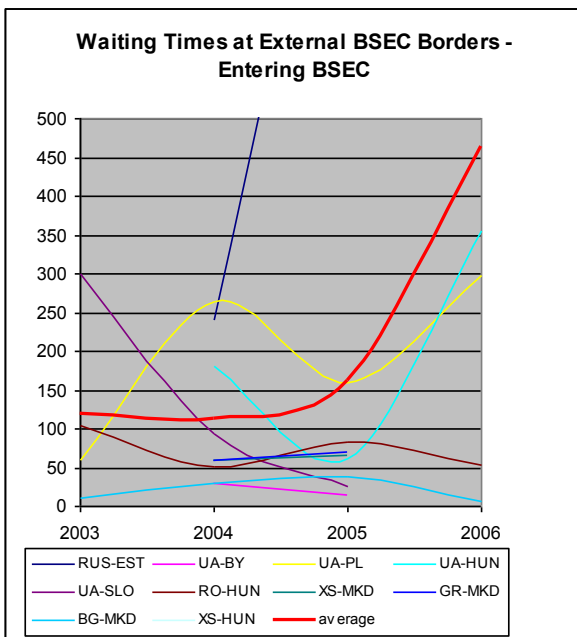


Fig. 9) Waiting times at External BSEC Borders - Entering BSEC

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

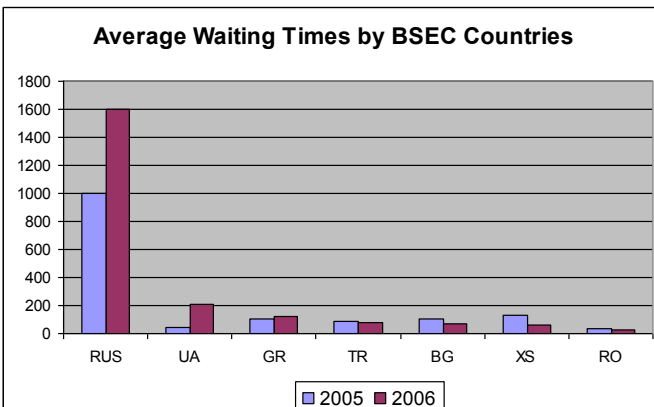


Figure 11 shows the average waiting times at borders by country for 7 BSEC countries, whose borders are covered, partially, in the BWTO database, as of 2005 and 2006.

Fig. 11) Average waiting times by country.

**UNION OF ROAD TRANSPORT ASSOCIATIONS IN THE BLACK SEA ECONOMIC COOPERATION REGION
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IV. CORRELATION ANALYSIS BETWEEN TRADE AND WAITING TIMES AT BORDERS IN THE BSEC REGION

Based on the data presented in sections 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 updated results are given in the table below.

	2003	2004	2005	2006
BSEC Trade	100	139,9	175,9	220,3
Internal Waiting Times	100	41,7	158,8	104,8
Non-BSEC Trade	100	127,0	154,2	190,4
External Waiting Times	100	106,8	173,4	519,4
Total BSEC Trade	100	129,0	157,5	195,0
Average Waiting Times	100	80,4	167,5	351,1

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

Table 10, indicates to existence of a general correlation in 2006 in conjunction with the change in foreign trade volume and border waiting times.

It is noteworthy that the internal BSEC trade volume grows very fast while there is a much slower growth of average internal waiting times. Indeed, the situation looks improving in actual terms from 2005 to 2006.

On the other hand, despite again a dynamic growth of the regional foreign trade with non-BSEC countries, situation about the border waiting times looks deteriorating in a much faster pace (also due to the effect of RUS-EST border), which causes to a negative impact on the average total foreign trade and average waiting times figures from 2005 to 2006.

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