



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

REP/GA12/OUTLOOK/07

Istanbul, 1 October 2007

**TWELFTH MEETING OF THE BSEC-URTA GENERAL ASSEMBLY**

Grand Hotel Sofia, Sofia – Bulgaria  
Friday, 2 November 2007, at 10:00 hrs

**BSEC OUTLOOK 2007: 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 first half of 2007 in comparison with previous years.

**I. INTERNATIONAL ROAD TRANSPORT INDUSTRY PERFORMANCE IN THE BSEC REGION IN THE FIRST HALF OF 2007**

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

To From	AL	AR	AZ	B	GE	GR	MD	RO	RU	XS	TR	UA	BSEC	EU	Others	TOTAL	
AL				320		18 730		10		720	230		20 010	25 930	1 420	47 360	
AR																	
AZ					50		1	25	1 504		53	148	1 781	430	1 436	3 647	
B																	
GE		70	1 498	120		407	14	99	1 210		2 320	475	6 213	3 850		10 063	
GR																	
MD	8	3	13	1 323	11	2 043		5 464	9 502	218	3 814	2 736	25 135	8 674	1 930	35 739	
RO	114	3	6	2 739	16	13 975	2 415		243	11 788	2 366	10 397	44 062	163 381	9 110	216 553	
RU																	
XS																	
TR	1 698		5 860	9 316	7 740	11 498	1 194	19 982	5 322	3 847		998	67 455	109 405	199 913	376 773	
UA	2	142	1 160	234	163	150	3 267	534	33 744	437	941		40 774	25 056	4 760	70 590	
													TOTAL	205 430	336 726	218 569	760 725

Table 1) Road transport operations in BSEC region in the first half of 2006

To From	AL	AR	AZ	B	GE	GR	MD	RO	RU	XS	TR	UA	BSEC	EU	Others	TOTAL	
AL				36		25 210		17		1 400	263		26926	8650	16	35 592	
AR				2	1				228			3	234	35	6	275	
AZ					1		1	3	809		61	99	974	606	1 358	2 938	
B																	
GE																	
GR																	
MD		51	26	2331	26	3 338		8 337	18 094	600	6 283	5 935	37 521	11 132	3 359	52 012	
RO	60	11	11	43	22		144		238	4 417	662	3 377	8 985	-	1 560	10 545	
RU		360	1 384	33	1 149	192	70	252		220	1 170	6 574	11 403	252 534	42 573	306 510	
XS																	
TR	2 145	4	9 579	12302	13 472	13 895	1 580	26 773	7 547	4843		1 171	93 311	118 438	215 683	427 432	
UA		269	1 257	452	260	274	3 671	967	45 490	38	987		53 665	25 129	7 506	86 300	
													TOTAL	233 019	416 524	272 060	921 604

Table 2) Road transport operations in BSEC region in the first half of 2007

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(BSEC-URTA)**

Figures 1 and 2 shows total international trips in the BSEC region in 2006 and the first half of 2007. Three categories: trips within the BSEC region, trips to the EU (EU countries except BG, GR, and RO) and trips to the rest of the world. Trips to EU constantly capsulate half of the total market while the number of trips within the BSEC region increased by --%.

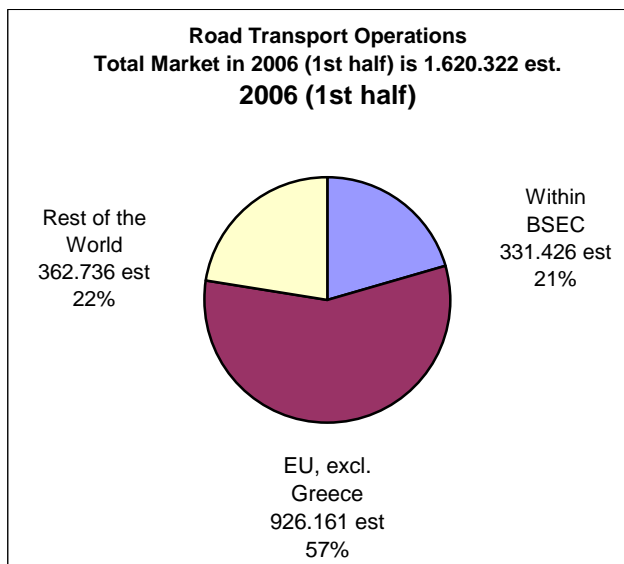


Fig. 1) International road transport trips by the BSEC hauliers in 2006.

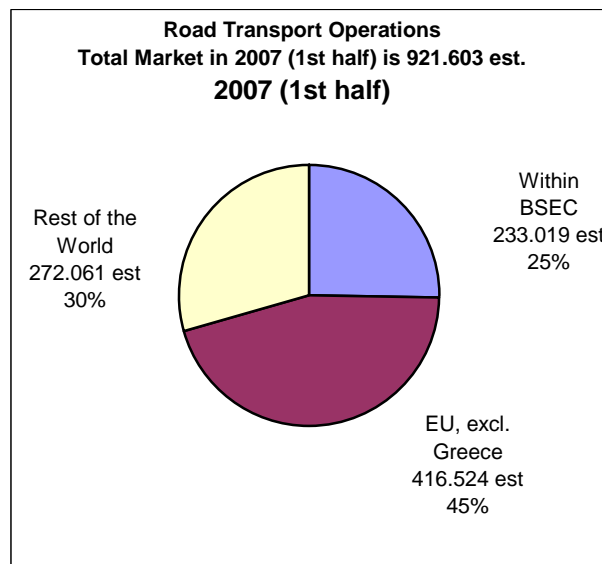


Fig. 2) International road transport trips by the BSEC hauliers in 2007.

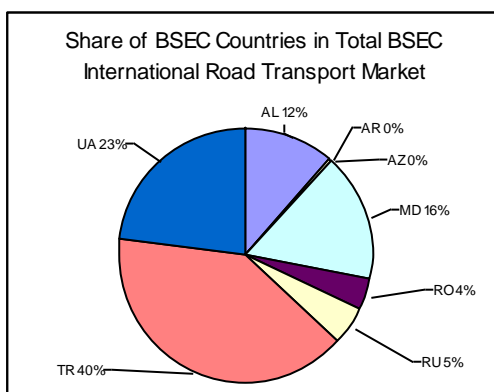


Fig. 3) Share of BSEC Countries in the whole BSEC International Road Transport Market (first half of 2007).

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 Bulgaria, Georgia, Greece and Serbia these countries are not included in the chart.

Table 3 shows the comparison of the situation at the BSEC International Road Transport Market in 2005, 2006 and in the 1<sup>st</sup> half 2007.

Table 4 shows the comparison of data for the 1<sup>st</sup> half 2006 and the 1<sup>st</sup> half 2007.

	2005	2006	% change to the previous period	2007 (1 <sup>st</sup> half)	% to the previous period
Total number of trips	3.368.627	3.044.743	-9,60%	921 604	30,27%
Trips within BSEC	755.565	763.230	1,01%	233 019	30,53%
Trips to EU	1.656.614	1.601.940	-3,30%	416 524	26,00%
Trips to Rest of the World	956.448	679.573	-28,90%	272 060	40,03%
BSEC Trips/Total Trips	22,43%	25,07%		25,28%	

Table 3) Comparative table of the BSEC International Road Transport Market in 2005, 2006 and the first half 2007.

	2006 (1 <sup>st</sup> half)	2007 (1 <sup>st</sup> half)	% change to the previous period
Total number of trips	1.620.322	921 604	-43,12
Trips within BSEC	331.426	233 019	-29,69
Trips to EU	926.161	416 524	-55,03
Trips to Rest of the World	362.736	272 060	-25,00
BSEC Trips/Total Trips	20,45%	25,28%	

Table 4) Comparative table of the BSEC International Road Transport Market in the first half of 2006 and in the first half of 2007.

**UNION OF ROAD TRANSPORT ASSOCIATIONS IN THE BLACK SEA ECONOMIC COOPERATION REGION  
(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 2006 and the first half of 2007 is presented in the tables below.

	AL	AR	AZ	B	GE	GR	MD	RO	RU	XS	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
GE	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
RU		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
XS				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
<b>BSEC Region Total Foreign Trade</b>													<b>77.444,43</b>	<b>459.108,83</b>	<b>16,87</b>

Table 4) Foreign Trade of the BSEC Countries in 2006 (1<sup>st</sup> half) (in million USD)  
Source: National Statistics Institutes

	AL	AR	AZ	B	GE	GR	MD	RO	RU	XS	TR	UA	Total with BSEC	Total with World	BSEC /World %
AL															
AR				46,11	51,14	25,25		33,61	277,04		46,91	124,13	604,19	1 891,95	31,93
AZ															
B	38,27				104,97	1 738,1		958,30	2 021,80	476,1	1 986,96	969,56	8 294,06	22 569,99	36,75
GE	1,54	70,23	230,30	104,34		30,50	2,18	38,21	322,02	0,98	387,83	263,57	1 451,71	2 777,75	52,26
GR															
MD															
RO	18,42	3,50	11,58	539,51	46,55	537,89	266,40		1527,34	238,47	2142,31	449,8	5 781,77	34 439,87	16,79
RU		406,20	801,20	2 132,20	330,6	1 313,5	747,10	2 177,80			11 722,80	16 256,60	35 888,00	286 746,10	
XS				382,50		223,00		359,4	1 628,80		221,70	304,10	3 119,50	14 533,90	21,46
TR				2 215,56		1 770,65		37 84,61	15 098,25			3 288,72	26157,80	150 925,30	17,33
UA	53,93	109,55	315,72	311,86	257,6	169,31	459,00	628,56	13 649,13	252,44	2 063,50		18 270,60	50 418,63	36,24
<b>BSEC Region Total Foreign Trade</b>													<b>99567,63</b>	<b>564303,39</b>	<b>17,64</b>

Table 5) Foreign Trade of the BSEC Countries in 2007 (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 2004-2007, and percentage changes between two subsequent periods.

	2004	2005	% change to previous period	2006	% change to previous period	2007 (1 <sup>st</sup> half)	% to previous period
Foreign Trade Within BSEC	107,94	135,71	25,73%	169,94	25,22%	99,57	58,59%
Total BSEC Foreign Trade	659,94	805,62	22,07%	997,24	23,78%	564,30	56,59%
Within BSEC/Total BSEC	16,36%	16,84%		17,04%		17,64%	

Table 7) Foreign trade of the BSEC region since 2004.

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

	2006 (1 <sup>st</sup> half)	2007 (1 <sup>st</sup> half)	% to previous period
Foreign Trade Within BSEC	63,43	99,57	58,59%
Total BSEC Foreign Trade	356,95	564,30	56,59%
Within BSEC/Total BSEC	17,77%	17,64%	

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

### 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. Since the BWTO system has been out of order for the first quarter of 2007, the Analysis presented below is for the second quarter of 2007.

As for the lack of information on BWTO data, the analysis could not be performed.

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

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

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