

## THIRTEENTH MEETING OF THE BSEC-URTA GENERAL ASSEMBLY

Holiday Inn Vinogradovo, Moscow – RUSSIAN FEDERATION  
Wednesday, 4 June 2008, at 10:00 hrs

### BSEC OUTLOOK 2007: BSEC-URTA INTERNATIONAL ROAD TRANSPORT INDUSTRY PERFORMANCE REPORT

Collecting statistical data and analysing 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 2007 in comparison with previous years.

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

	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SCG	TR	UA	BSEC	EU24	Others	Total
AL				60		45 000		30		2 500	480		48 070	16 500	30	64 600
AM					100	2	4		600			200	906	50		956
AZ					4		4	52	1 113		153	371	1 697	1 425	3 300	6 422
BG**	2 955	170	22		149	92 333	1 889	25 228	5 836	18 138	59 381	3 942	210 043	150 071	60 712	420 826
GE		2 865	1 353	30		1 500	25	10	700		3 850	980	11 313	3 500		14 813
GR													0			0
MD	31	24	25	3 378	30	6 567		16 853	42 746	843	9 396	10 478	90 371	17 032	933	108 336
RO	114	3	6	*3.132	16	13 975	2 761		243	11 788	2 705	10 397	42 008	193 381	9 110	244 499
RU**		1 020	2 392	45	3 401	422	194	760		686	2 539	12 791	24 250	475 322	89 544	589 116
SCG	1 288	1	0	5 358	91	14 745	14	15 612	4 070		1 598	1 831	44 608	141 868	171 628	358 104
TR	3 342		13 401	23 674	19 547	24 956	2 160	38 590	15 139	7 185		2 813	150 807	205 824	399 504	756 135
UA	3	382	2 280	623	418	359	7 477	1 199	76 811	1 033	1 682		92 267	52 136	12 512	156 915
<b>Total</b>													<b>716 340</b>	<b>1 257 109</b>	<b>747 273</b>	<b>2 720 722</b>

Table 1) Road transport operations in BSEC region in 2006

(\*) estimated value (\*\*) assuming 20 tons per truck

	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SRB	TR	UA	BSEC	EU24	Others	Total
AL		0	0	130	0	52 210	2	49	3	972	533	0	53 899	19 120	69	73 088
AM				6	150		2		800			250	1 208	40		1 248
AZ				2	314				3 635		592	120	4 663	852	44	5 559
BG													0			0
GE		3 765	1 987	488		2 725	188	117	0	0	4 325	1 780	15 375	3 178	280	18 833
GR													0			0
MD	0	83	44	936	35	4 714		13 288	30 589	1 011	11 306	9 431	71 437	16 886	5 926	94 249
RO	72	12	16	68	30		211		378	7 003	816	4 550	13 156		2 572	15 728
RU**		705	2 855	60	2 865	585	145	495		565	2 630	14 360	25 265	541 005	88 787	655 057
SRB	0	0	150	10 000	0	13 000	0	14 000	1 000		9 000	1 500	48 650	78 680	64 200	191 530
TR	4 718	4	22 124	25 195	28 152	28 492	2 776	53 470	15 424	9 197		3 585	193 137	137 493	553 439	884 069
UA	0	245	458	4 833	460	692	20 538	13 246	26 712	1 905	6 307		75 396			75 396
<b>Total</b>													<b>502 186</b>	<b>797 254</b>	<b>715 317</b>	<b>2 014 757</b>

Table 2) Road transport operations in BSEC region in 2007

(\*) estimated value (\*\*) assuming 20 tons per truck

Figures 1 and 2 show the total international trips in the BSEC region in 2006 and 2007. Three categories: trips within the BSEC region, trips to the EU24 (EU countries except BG, GR and RO) and trips to the rest of the world.

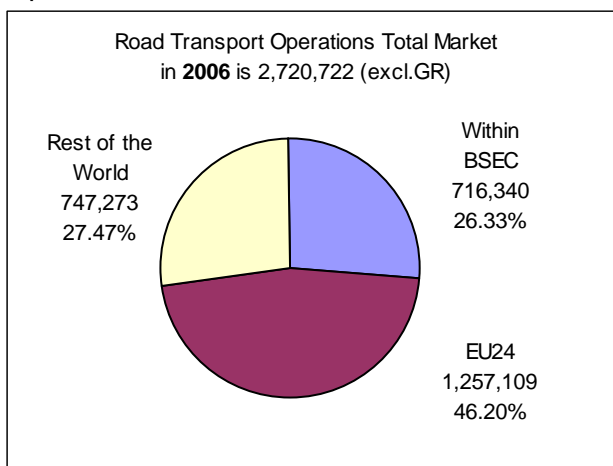


Fig. 1) International road transport trips by the BSEC hauliers in 2006.

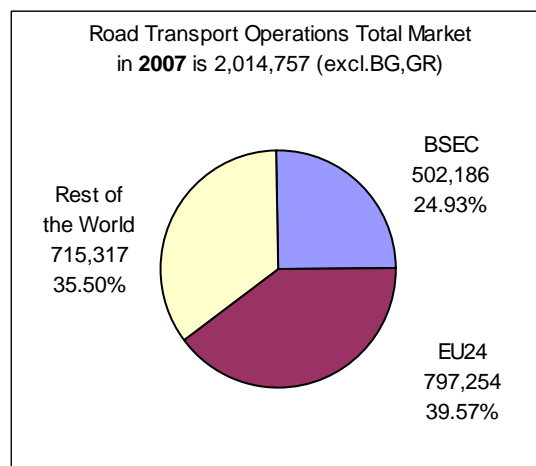


Fig. 2) International road transport trips by the BSEC hauliers in 2007.

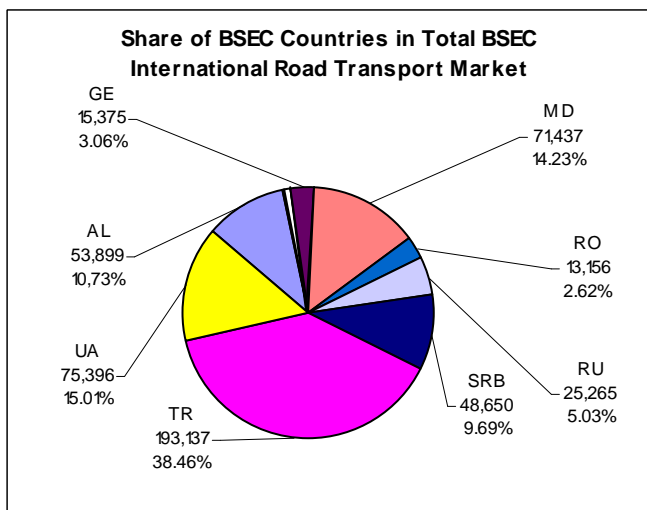


Fig. 3) Share of BSEC Countries in the whole BSEC International Road Transport Market in 2007.

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 BG and GR, these countries are not included in the chart.

Table 3 shows the comparison of the situation at the BSEC International Road Transport Market in 2006 and 2007.

	2006(*)	2007 (*)	% change to the previous period
<b>Total number of trips</b>	<b>2.299.896</b>	<b>2.014.757</b>	<b>-12,40</b>
<b>Trips within BSEC</b>	<b>506.297</b>	<b>502.186</b>	<b>-0,81</b>
<b>Trips to EU</b>	<b>1.107.038</b>	<b>797.254</b>	<b>-27,98</b>
<b>Trips to Rest of the World</b>	<b>686.561</b>	<b>715.317</b>	<b>4,19</b>
<b>BSEC Trips/Total Trips, %</b>	<b>22,01%</b>	<b>24,93%</b>	

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

(\*) Estimated data, preserves the tendency of the region excluding BG, GR.

## 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 2007 is presented in the tables below.

	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SCG	TR	UA	Total with BSEC	Total with World	BSEC /World %
AL			0,8	103,1	15,0	587,3	5,1	53,8	112,4	44,1	253,3	81,6	1 256,4	3 840,3	32,72
AM				42,9	89,8	52,0		83,8	426,6		97,7	187,4	980,2	3 198,3	30,65
AZ					285,2	182,0			1 216,2		773,2	317,4	2 774,0	11 637,2	23,84
BG	99,9				137,6	2 484,7		1 495,5	4 208,5	735,0	3 116,3	823,7	13 101,2	38 279,1	34,23
GE	5,2	114,0	410,8	177,8		28,4	3,7	46,4	637,4	13,0	647,9	377,1	2 461,7	4 674,3	52,67
GR	510,4	23,2	76,2	2 296,0	82,8		33,2	1 374,7	4 991,0	391,2	2 728,3	354,4	12 861,5	84 212,9	15,27
MD	0,7	2,4	6,6	49,2	4,4	22,6		501,5	599,0	7,0	142,3	645,2	1 980,9	3 744,8	52,90
RO	32,2	7,7	104,7	1 397,5	207,4	1 240,2	562,8		4 408,7		5 025,3	1 131,1	14 117,5	83 581,8	16,89
RU*		491,1	1 662,7		655,5	3 092,1	962,4				16 999,2	23 870,0	47 733,0	438 538,7	10,88
SCG				571,2		352,3		611,0	2 451,9		293,6	410,5	4 690,4	19 534,9	24,01
TR	226,1	0,0	1 027,2	3 202,9	752,7	2 641,3	136,1	4 980,4	20 740,1	338,3		4 145,2	38 190,2	222 600,2	17,16
UA	90,5	148,6	463,0	726,1	384,8	198,2	793,6	1 072,0	22 437,9	322,4	3 159,1		29 796,1	83 402,2	35,73
<b>BSEC Region Total Foreign Trade</b>													<b>169 943,03</b>	<b>997 244,64</b>	<b>17,04</b>

Table 4) Foreign Trade of the BSEC Countries in 2006 (in million USD)  
Source: National Statistics Institutes

	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SRB	TR	UA	Total with BSEC	Total with World	BSEC /World %
AL				94,7		741,6		31,5	153,4	111,7	346,7	93,4	1 573,0	5 261,5	29,90
AM														4 439,2	
AZ					406,7	145,9		88,43	1 529,8		1 680,8	494,7	4 257,9	11 766,9	36,19
BG	93,8				341,3	3 975,1		2 541,1	4 683,7	1 199,5	4 708,2	2 665,8	20 208,7	54 563,4	37,04
GE		170,4	519,3	243,4		59,9	4,7	97,7	631,9		899,7	669,1	3 296,0	6 456,9	51,05
GR														112 788,2	
MD		1,9	8,9	77,7	4,2	31,6		660,3	731,4		198,9	854,9	2 569,7	5 031,7	51,07
RO														125 333,1	
RU														578 234,0	
SRB														27 175,2	
TR	319,0	0,0	1 378,0	4 012,0	936,0	3 213,0	199,0	6 757,0	28 235,0	546,0		6 000,0	51 595,0	277 270,0	18,61
UA	104,1	251,0	662,3	723,6	627,9	338,3	1 079,6	1 407,4	29 505,9	415,1	4 622,1		39 737,2	109 918,0	36,15
<b>BSEC Region Total Foreign Trade</b>													<b>1 318 238,0</b>		

Table 5) Foreign Trade of the BSEC Countries in 2007 (in million USD)  
Source: National Statistics Institutes

The following table shows different foreign trade indicators of the BSEC region in 2005, 2006 and 2007, and percentage changes between periods.

	2005	2006	% change to previous period	2007	% change to previous period
Foreign Trade Within BSEC	135,71	169,94	25,23	* 233,85	* 37,60
Total BSEC Foreign Trade	805,62	997,24	23,79	1 318,24	32,19
Within BSEC/Total BSEC	16,85%	17,04%		* 17,74%	

Table 6) Foreign trade of the BSEC region in 2005, 2006 and 2007.

(\*) Estimated figure: average growth rate of AL, AZ, BG, GE, MD, TR, UA is applied to AM, GR, RO, RU, SRB, too

## I. WAITING TIMES AT BSEC BORDERS

Using the IRU Border Waiting Times Observatory (BWTO) data, the BSEC-URTA International Secretariat analyzed the situation at 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.

However, due to lack of new data about 2007 in the BWTO system, an updated analysis could not be made. Therefore, the last available figures are presented again as contained in the BSEC-URTA document (REP/GA11/OUTLOOK/07).

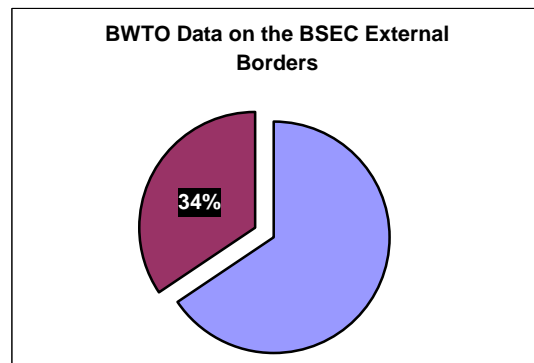
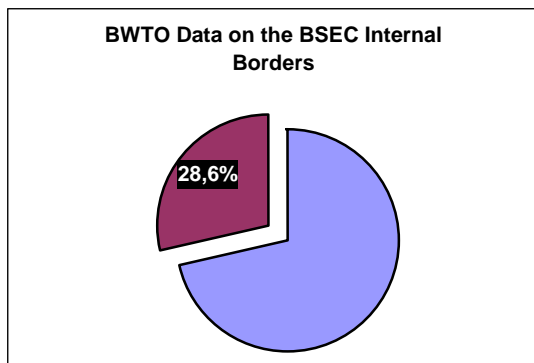


Fig. 4) BWTO Data on the BSEC Internal (6 out of 21) and External (10 out of 29) borders.

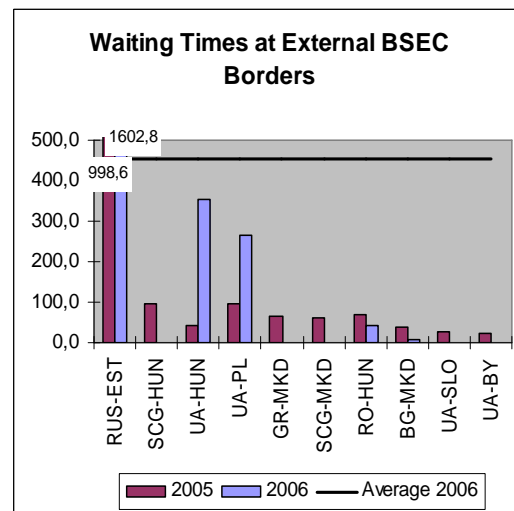
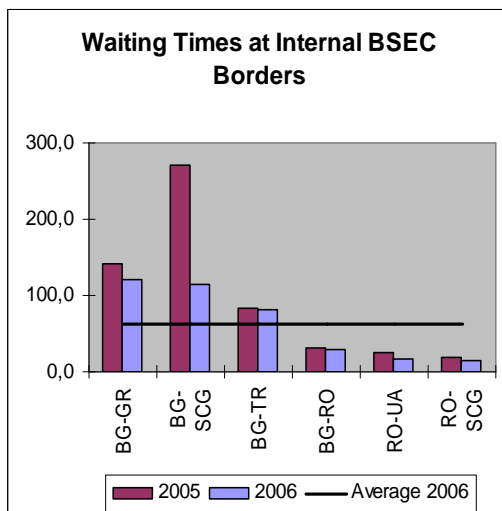
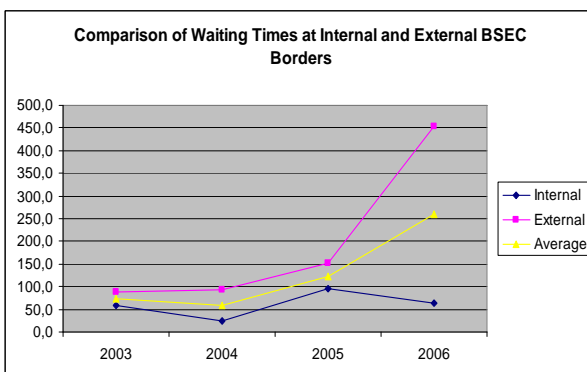


Fig. 5) Waiting times at Internal and External BSEC borders (averages of the year 2005 and 2006). Horizontal line represents the average waiting time in 2006, in general.



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

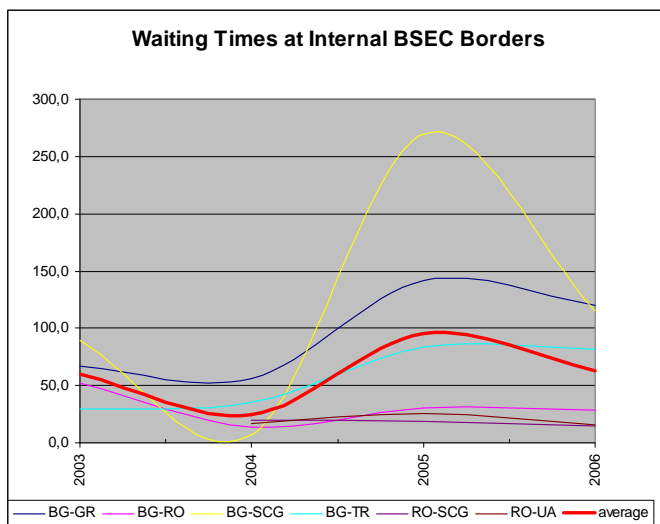
Fig. 6) Comparison of waiting times at Internal and External BSEC borders, and their average.

## SITUATION AT BSEC INTERNAL BORDERS

The following analysis is based on the latest available data as contained in the BSEC-URTA document (REP/GA11/OUTLOOK/07):

	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-SCG	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-SCG		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-SCG 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%
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	2,4%				
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%
SCG-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)

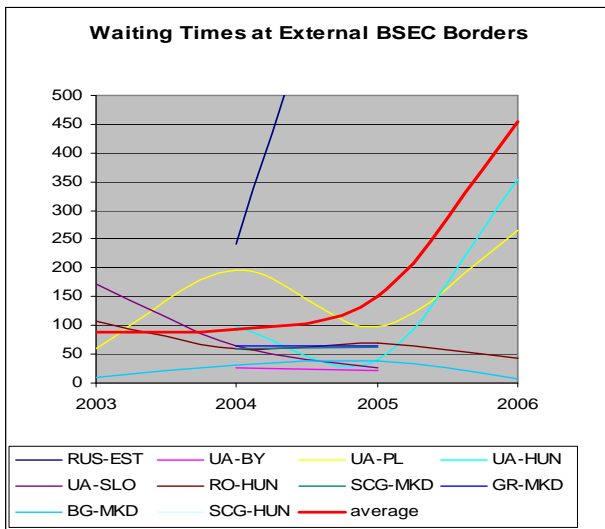


Table 9 and Figures 8-10 illustrate the situation at external BSEC borders. There is a big difference between the average waiting times at the internal and external borders. Furthermore, it is noteworthy that average waiting times while entering the BSEC region are five times higher than the waiting 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 998.6 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)

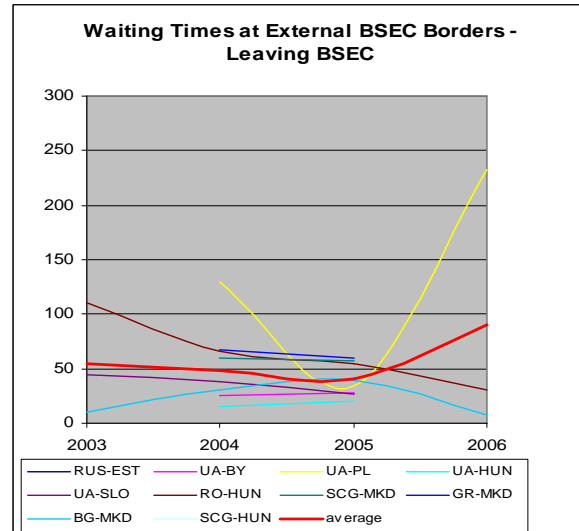
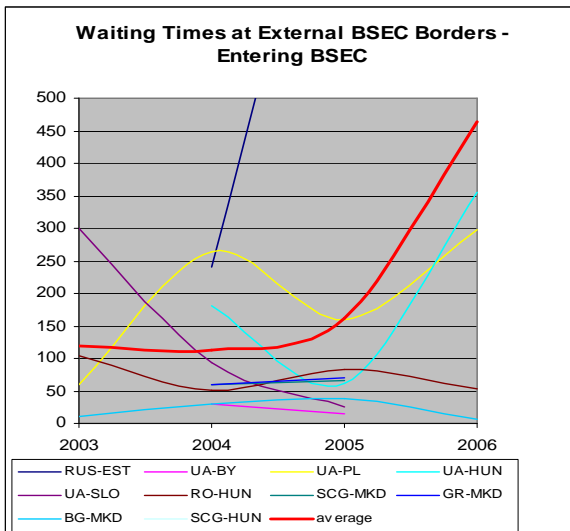


Fig. 9) Waiting times at External BSEC Borders - Entering BSEC Fig. 10) Waiting times at External BSEC Borders – Leaving BSEC

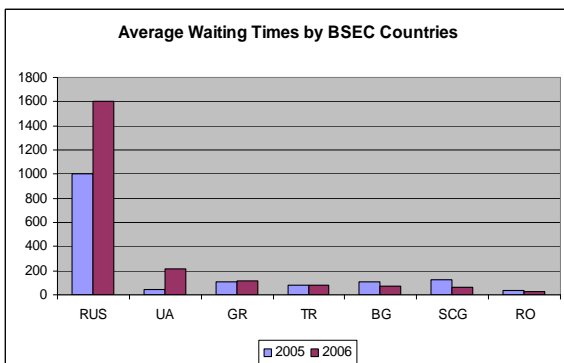


Figure 11 shows the average waiting times at borders by country for 7 BSEC countries, whose borders are covered, partially, in the BWTO database, as of 2005 and 2006.

Fig. 11) Average waiting times by country.

## II. 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 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.

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