

SIXTEENTH MEETING OF THE BSEC-URTA GENERAL ASSEMBLY

Conference Centre Varembe (CCV)
Geneva – Switzerland
Wednesday, 04 November 2009, at 15:00 hrs

**BSEC OUTLOOK 2009-I: 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 the first half of 2009 in comparison with previous years.

I. INTERNATIONAL ROAD TRANSPORT INDUSTRY PERFORMANCE IN THE BSEC REGION IN THE FIRST HALF OF 2009

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

2008	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SRB	TR	UA	BSEC	EU24	Others	Total
AL		0	0	146	0	48.453	2	58	4	1.067	473	0	50.203	18.649	67	68.919
AM				10	225		2		850			230	1.317	60		1.377
AZ				5	485				4.924		21	342	5.777	922	80	6.779
BG*	2.355					107.255	20.060	52.185	4.285	8.490	23.235	1.050	218.915	80.165	2.630	301.710
GE	0	4.252	4.341	471		648	129	121			3.080	2.774	15.816	7.959	43	23.818
GR																
MD	18	116	103	7.037	94	5.339		13.484	34.011	766	14.317	13.476	88.761	15.693	5.985	110.439
RO	58	11	11	106	23		408		691	8.444	1.004	5.792	16.548	52	3.012	19.612
RU*	0	572	4.203	155	5.187	877	344	1.068		732	3.193	29.968	46.299	774.066	93.062	913.427
SRB**													55.292	104.520	84.923	244.735
TR	4.876	205	63.117	28.141	34.944	31.144	3.289	49.093	17.927	8.079		6.102	246.917	224.849	361.696	833.462
UA		505	941	6.398	920	821	22.038	14.633	25.768	1.671	8.658		82.353	396.671	40.403	519.427

Table 1) Road transport operations in BSEC region in 2008 (updated).

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

2009-I	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SRB	TR	UA	BSEC	EU24	Others	Total
AL				69		24.301		34	1	53	179		24.637	14.267	13	38.917
AM																
AZ				4			10		1.550		10	80	1.654	1.350	944	3.948
BG																
GE		1.920	2.346	212		316	69	150			1.987	1.114	8.114	2.347	27	10.488
GR																
MD		52	23	5.123	1	1.344		3.618	10.672	206	5.859	3.552	30.450	6.485	1.967	38.902
RO	63	55	25	308	61		201		720		1.725	4.024	7.182			7.182
RU*		294	2.691	141	2.522	761	130	535		217	1.487	7.432	16.210	243.193	40.981	300.384
SRB				5.907		5.878		10.775	2.076		2.485	1.294	28.415			28.415
TR	2.260	16	24.369	13.822	13.458	13.982	830	16.013	4.172	2.830		2.122	93.874	85.917	199.151	378.942
UA		477	1.835	4.152	999	474	11.250	6.885	14.247	887	6.740		47.946	168.861	19.796	236.603

Table 2) Road transport operations in BSEC region in the first half of 2009.

(*) assuming 20 tons per truck

Figures 1 and 2 show the total international trips in the BSEC region in 2008 and estimation for the first half of 2009. 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. Share of 'in-BSEC' operations has preserved its one-third market share in the first six months of 2009.

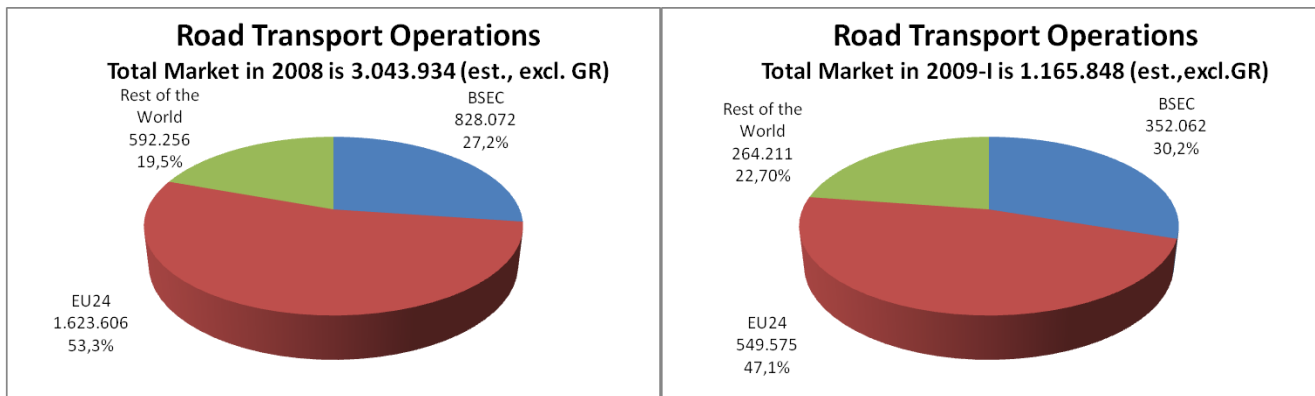


Fig.1) International road transport trips by the BSEC hauliers in 2008. Fig.2) International road transport trips by the BSEC hauliers in Jan-Jun 2009.

Figure 3 shows the share between BSEC Countries in the whole international road transport market of the BSEC Region according to data for the first half of 2009. Since there were no data provided for AM, BG and GR, these countries are not included in the chart.

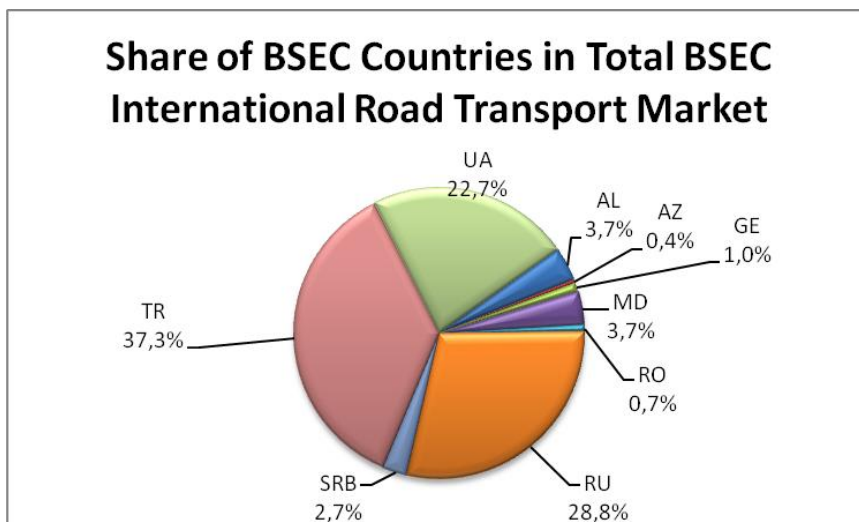


Fig.3) Share of BSEC Countries in the whole BSEC International Road Transport Market in 2008.

Table 3 shows the comparison of the situation at the BSEC International Road Transport Market in 2005-2008 and in the first half of 2009. The number of trips made in the January-June 2009 has reached less than 40% of the total market in 2008, indicating a general decrease in the road transport industry performance in the BSEC region in the first half of 2009.

	2005	2006	% change to the previous period	2007	% change to the previous period	2008 (upd.)	% change to the previous period	2009-I (*)	% weight to the previous period
Total number of trips	3.368.627	3.400.674	0,95	2.538.133	-25,36	3.043.934	19,93	1.165.848	38,30
Trips within BSEC	755.565	805.614	6,62	728.712	-9,55	828.072	13,64	352.062	42,52
Trips to EU	1.656.614	1.743.859	5,27	1.222.213	-29,91	1.623.606	32,84	549.575	33,85
Trips to Rest of the World	956.448	851.201	-11,00	587.208	-31,01	592.256	0,86	264.211	44,61
BSEC Trips/Total Trips, %	22,43%	23,69%		28,71%		27,20%		30,20%	

Table 3) Comparative table of the BSEC International Road Transport Market in 2005-2008 and in the first half of 2009.

(*) Estimated data, preserves the tendency of the region excluding AM, 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 2008 and in the first half of 2009 is presented in the tables below.

2008	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SRB	TR	UA	Total with BSEC	Total with World	BSEC /World %
AL						464,0			175,0		236,0	53,0	928,0	4.580,0	20,26%
AM				179,9	131,3	39,3		97,2	1.066,7		269,6	333,0	2.116,9	5.480,8	38,62%
AZ	8,3	0,0	0,0	211,5	542,3	297,5	6,4	201,5	1.933,0	4,8	1.433,2	739,4	5.377,9	54.922,8	9,79%
BG	81,0				536,0	2.874,0		2.535,0	3.885,0	825,0	2.749,0	2.015,0	15.500,0	40.669,0	38,11%
GE	1,3	196,4	813,2	231,1		63,5	4,9	106,0	454,5	2,1	1.202,8	791,8	3.867,7	7.555,8	51,19%
GR	477,3	14,3	12,1	2.353,2	24,7		25,7	1.277,3	2.754,7	385,4	2.269,8	487,7	10.082,2	70.057,5	14,39%
MD				22,3				926,6	984,5		265,4	981,8	3.180,7	6.496,2	48,96%
RO	39,0	5,6	116,5	2.366,4	164,4	1.415,5	802,3		3.948,9	713,7	4.980,2	1.348,4	15.900,9	89.964,7	17,67%
RU		899,9	2.402,5	5.417,8	578,7	4.770,1	1.796,9	5.183,7			33.849,2	39.786,6	94.685,4	734.991,6	12,88%
SRB				997,9		498,7		1.029,1	4.043,6		481,9	867,6	7.918,8	33.972,0	23,31%
TR	217,0		1.645,0	2.531,0	965,0	2.272,0	169,0	4.776,0	24.011,0	329,0		5.260,0	42.175,0	211.881,0	19,91%
UA	80,8	289,1	986,3	1.345,4	847,6	510,9	1.347,7	1.841,9	35.153,4	648,4	6.583,8		49.635,2	152.536,9	32,54%
BSEC Region Total Foreign Trade													251.368,6	1.413.108,2	17,79%

Table 4) Foreign Trade of the BSEC Countries in 2008 (updated) (in million USD)
Source: National Statistics Institutes

2009-I	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SRB	TR	UA	Total with BSEC	Total with World	BSEC /World %
AL						365,9			33,4		143,6	50,8	593,7	2.558,5	23,21%
AM				56,2	49,0	11,9		29,0	393,0		69,2	86,4	694,8	1.659,9	41,86%
AZ	1,5			5,9	244,5	81,9	1,9	57,2	728,0	0,6	407,1	258,6	1.787,2	8.543,0	20,92%
BG	37,8	8,3	11,5		183,6	1.323,6	30,6	1.213,2	1.477,6	287,6	1.093,7	696,7	6.364,1	18.154,0	35,06%
GE		57,2	252,0	75,5		27,6	1,6	55,2	150,1	0,7	497,4	233,1	1.350,5	2.507,6	53,86%
GR	296,6	5,3	27,3	1.136,3	16,5		24,7	618,7	587,8	177,0	1.233,8	152,5	4.276,4	38.147,0	11,21%
MD	0,1	0,9	1,7	24,8	3,5	24,9		248,3	261,1	4,9	92,8	229,6	892,6	2.078,7	42,94%
RO	18,6	0,7	63,1	1.145,6	76,0	699,3	321,0		1.067,6	366,7	1.809,0	318,3	5.885,8	41.999,6	14,01%
RU		302,8	802,4	1.205,4	129,0	954,7	385,2	868,6			8.498,5	8.483,7	21.630,3	196.347,2	11,02%
SRB				232,2		158,7		445,4	1.089,9		151,4	209,7	2.287,3	10.944,4	20,90%
TR	131,9	0,2	1.025,1	1.094,1	519,2	1.310,4	107,0	1.957,8	10.210,2	151,3		1.995,9	18.503,0	126.959,9	14,57%
UA	51,5	74,8	257,2	247,0	217,0	78,4	328,5	316,5	7.725,0	68,5	1.378,4		10.742,8	37.103,7	28,95%
BSEC Region Total Foreign Trade													75.008,5	487.003,6	15,40%

Table 5) Foreign Trade of the BSEC Countries in the first half of 2009 (in million USD)
Source: National Statistics Institutes

The following table shows different foreign trade indicators of the BSEC region in 2005-2009, and percentage changes between periods. The volume of the foreign trade in the first half of the 2009 has reached only one-third of the corresponding indicator in 2008. Therefore, for the end of 2009 the forecast of 30% decrease may be given.

	2005	2006	% change to prev. period	2007	% change to prev. period	2008	% change to prev. period	2009-I	% weight to previous period
Foreign Trade Within BSEC	135,71	169,94	25,23	223,49	31,51	251,37	12,47	75,01	29,84
Total BSEC Foreign Trade	805,62	997,24	23,79	1.207,44	21,08	1.413,11	17,03	487,00	34,46
Within BSEC/Total BSEC	16,85%	17,04%		18,51%		17,79%		15,40%	

Table 6) Foreign trade of the BSEC region in 2005-2008 and in the first half of 2009.

III. 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 first half of 2009 is presented below.

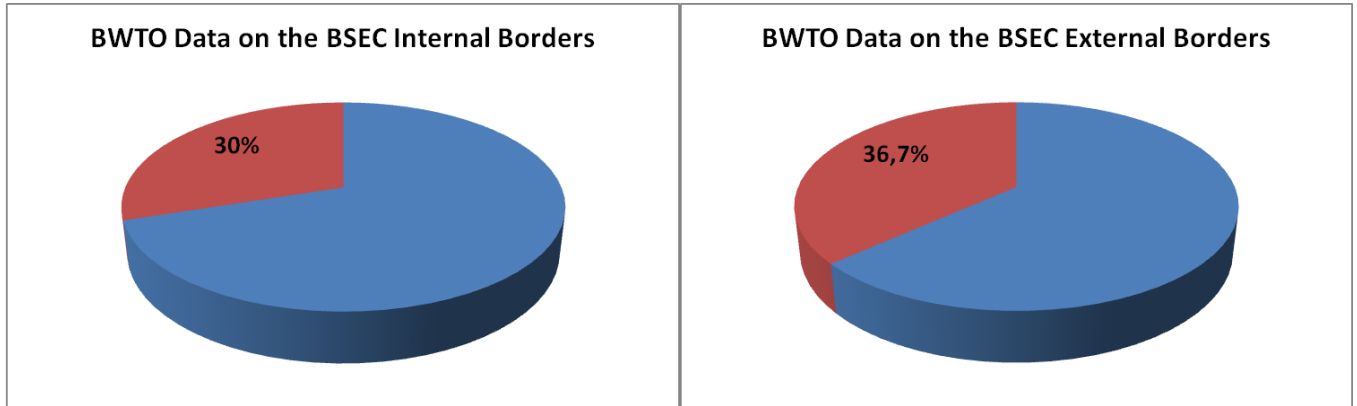


Fig. 4) BWTO Data on the BSEC Internal (6 out of 20) and External (11 out of 30) borders.

The data coverage of BSEC internal and external borders in the first half of 2009 has decreased to percentages illustrated in Fig.4.

In average, waiting times at BSEC borders have increased both at internal and external borders in the first half of 2009, with the average value of 185,8 minutes (see Fig.5).

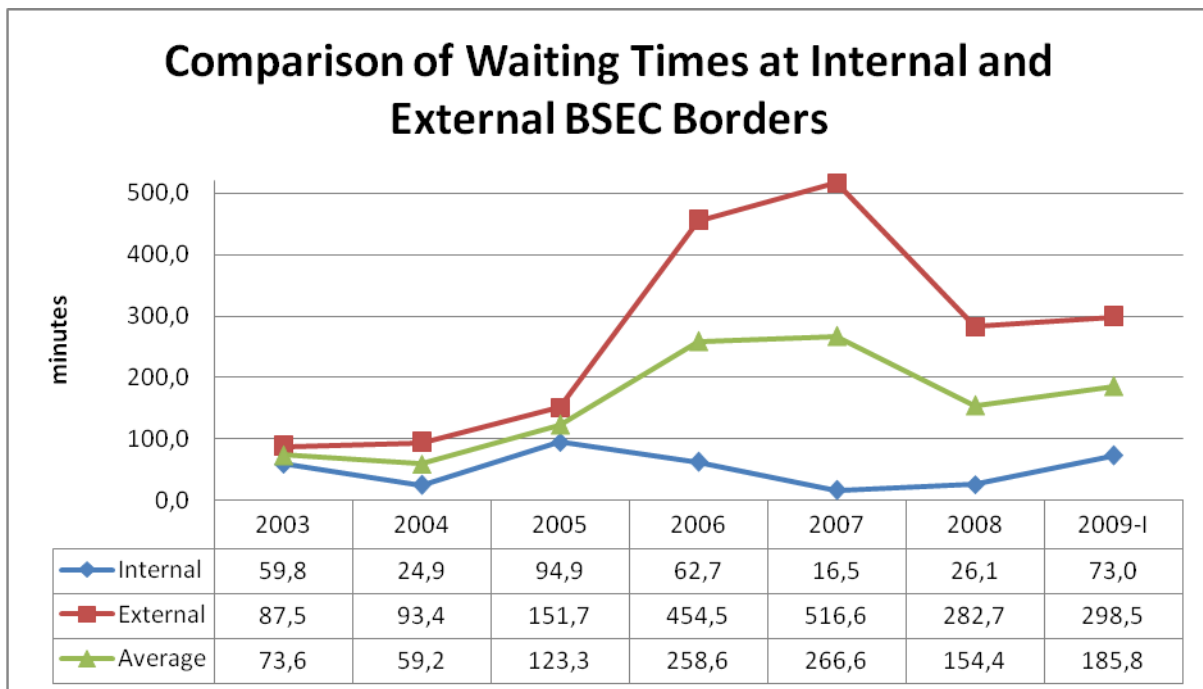


Fig. 5) Comparison of waiting times at Internal and External BSEC borders, and their average.

SITUATION AT BSEC INTERNAL BORDERS

	2003	2004	% change to the prev. period	2005	% change to the prev. period	2006	% change to the prev. period	2007	% change to the prev. period	2008	% change to the prev. period	2009-I	% change to the prev. period
BG-GR	67,0	56,5	-15,7%	141,6	150,5%	120,0	-15,2%	0,0	-100,0%	0,0	0,0%	60,0	
BG-RO	52,0	14,0	-73,1%	30,4	117,3%	28,7	-5,7%	0,3	-99,0%	21,0	7536,4%	60,0	185,7%
BG-SRB	90,0	7,0	-92,2%	269,9	3755,3%	115,3	-57,3%	18,0	-84,4%	38,0	111,1%	105,0	176,3%
BG-TR	30,0	35,0	16,7%	83,4	138,4%	81,6	-2,2%	81,0	-0,8%	104,0	28,4%	93,1	-10,5%
RO-SRB		20,0		18,8	-6,3%	15,0	-20,0%	8,5	-43,3%	8,0	-5,9%		
RO-UA		17,0		25,5	50,0%	15,9	-37,8%	4,0	-74,8%	1,8	-55,5%	60,0	3270,8%
RO-MD								4,0		1,9	-53,3%		
RUS-UA										34,0		60,0	76,5%
average	59,8	24,9	-58,3%	94,9	280,9%	62,7	-33,9%	16,5	-73,6%	26,1	57,7%	73,0	180,0%

Table 7) Waiting times at Internal BSEC Borders (in minutes) and percentage change.

Table 7 and Figure 6 illustrate the situation at internal BSEC borders. Number of internal BSEC borders covered by BWTO decreased by two because of lack of data for RO-SRB and RO-MD borders in the first half of 2009.

In January-June 2009, waiting times are observed to increase more than twice, in average, and only at BG-TR border 10%-decrease is observed.

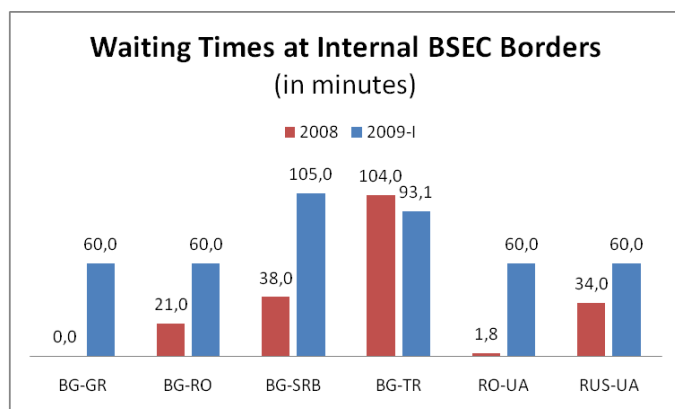


Fig. 6) Waiting times at Internal BSEC Borders

SITUATION AT BSEC EXTERNAL BORDERS

	2003	2004	% change to the previous period	2005	% change to the previous period	2006	% change to the previous period	2007	% change to the previous period	2008			% change to the previous period	2009-I			% change to the previous period
	average	average		average		average		average		in BSEC	out BSEC	average		in BSEC	out BSEC	average	
RUS-EST		241,0		998,6	314,3%	1602,8	60,5%	2506,5	56,4%	1877,66	547,09	1212,4	-51,6%	1234,4	444,0	839,2	-30,8%
UA-BY		27,5		21,7	-21,0%					60	60	60,0		50,5	60,0	55,2	-8,0%
UA-PL	60,0	197,0	228,3%	97,1	-50,7%	265,5	173,3%	382,1	43,9%	931,13	412,45	671,8	75,8%	159,2	111,2	135,2	-79,9%
UA-HUN		97,5		41,3	-57,6%	355,0	759,4%	171,0	-51,8%	158,74	195,63	177,2	3,6%	124,0	60,0	92,0	-48,1%
UA-SLO	172,5	65,5	-62,0%	26,6	-59,4%			600,0		221,03	317,07	269,1	-55,2%		206,0	206,0	-23,4%
RO-HUN	107,5	59,0	-45,1%	68,7	16,4%	42,0	-38,9%	2,8	-93,4%	10,56	6,33	8,4	203,8%				
SRB-MKD		60,0		61,5	2,5%			16,7			12,44	12,4	-25,5%				
GR-MKD		63,5		65,0	2,4%			70,8		31,78	18,3	25,0	-64,6%				
BG-MKD	10,0	30,0	200,0%	38,8	29,2%	7,0	-81,9%	38,7	452,9%	40,04	30,3	35,2	-9,1%	90,0		90,0	155,9%
SRB-HUN				97,5				15,2		10,4	9,26	9,8	-35,2%				
RUS-FI								768,3		493,08		493,1	-35,8%	680,0		680,0	37,9%
RUS-BY								93,8			80,47	80,5	-14,2%		60,0	60,0	-25,4%
RUS-LT								584,8		500,18	343,29	421,7	-27,9%	439,2	597,5	518,3	22,9%
RUS-LV								1758,8			394,91	394,9	-77,5%	377,6		377,6	-4,4%
RUS-PL								223,4		421,65	316,67	369,2	65,3%	230,0		230,0	-37,7%
average	87,5	93,4	6,8%	151,7	62,3%	454,5	199,6%	516,64	13,7%	396,35	196,02	282,71	-45,3%	376,1	219,8	298,5	5,6%

Table 8) Waiting times at External BSEC Borders (in minutes)

Waiting Times at External BSEC Borders

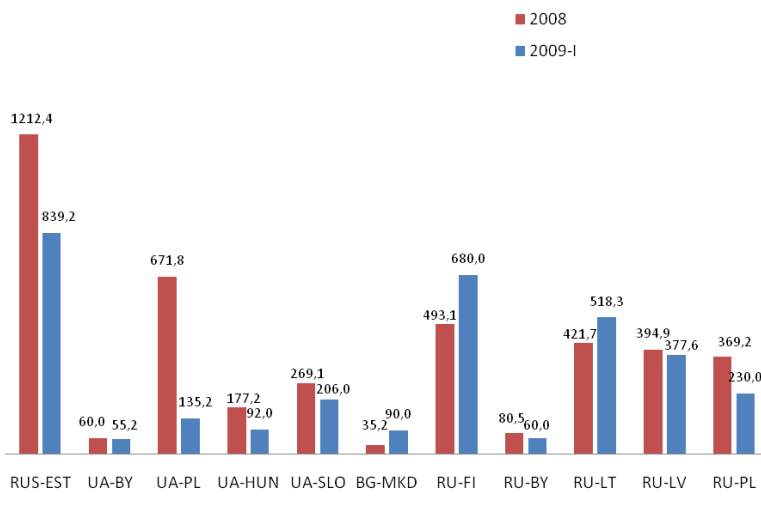


Fig. 8) Waiting times at External BSEC Borders (in minutes)

Waiting Times at External BSEC Borders - Entering BSEC

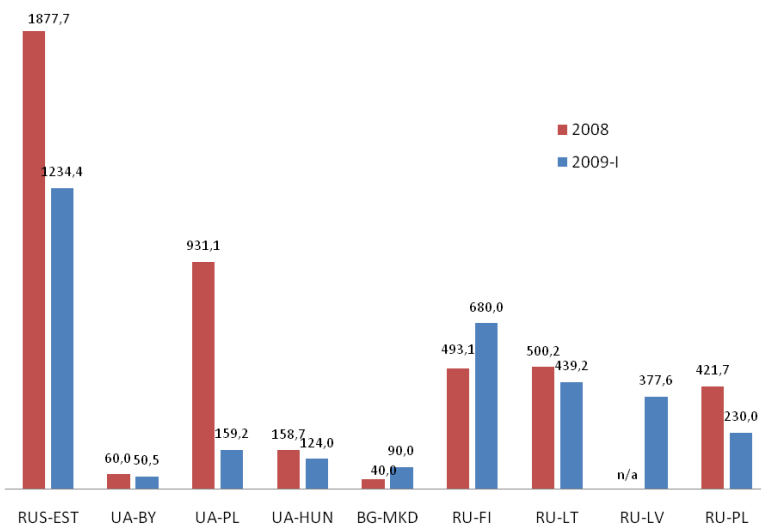


Fig. 9) Waiting times at External BSEC Borders - Entering BSEC

Waiting Times at External BSEC Borders - Leaving BSEC

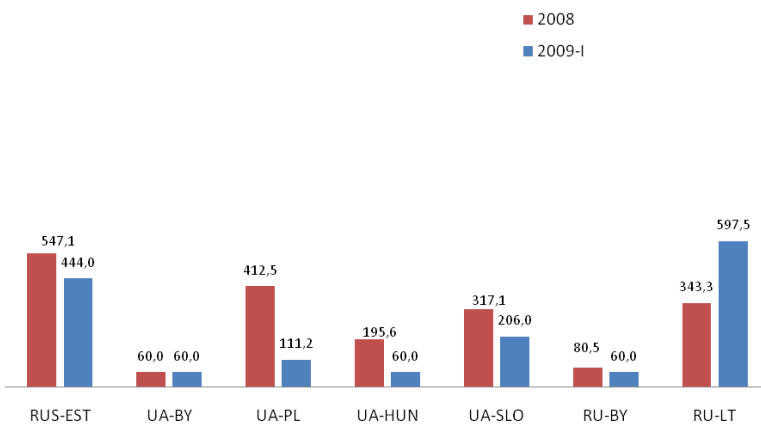


Fig. 10) Waiting times at External BSEC Borders – Leaving BSEC

Table 8 and Figures 8-10 illustrate the situation at external BSEC borders. There were no available data for RO-HUN, SRB-MKD, GR-MKD and SRB-HUN borders in January-June 2009, therefore the BWTO coverage of external BSEC borders decreased to 36,7%.

Average waiting time at external BSEC borders in the first half of 2009 was 298,5 minutes, almost the same as in 2008.

In general, at most of external borders situation has improved during the concerned period, except BG-MKD, RUS-FI and RUS-LT.

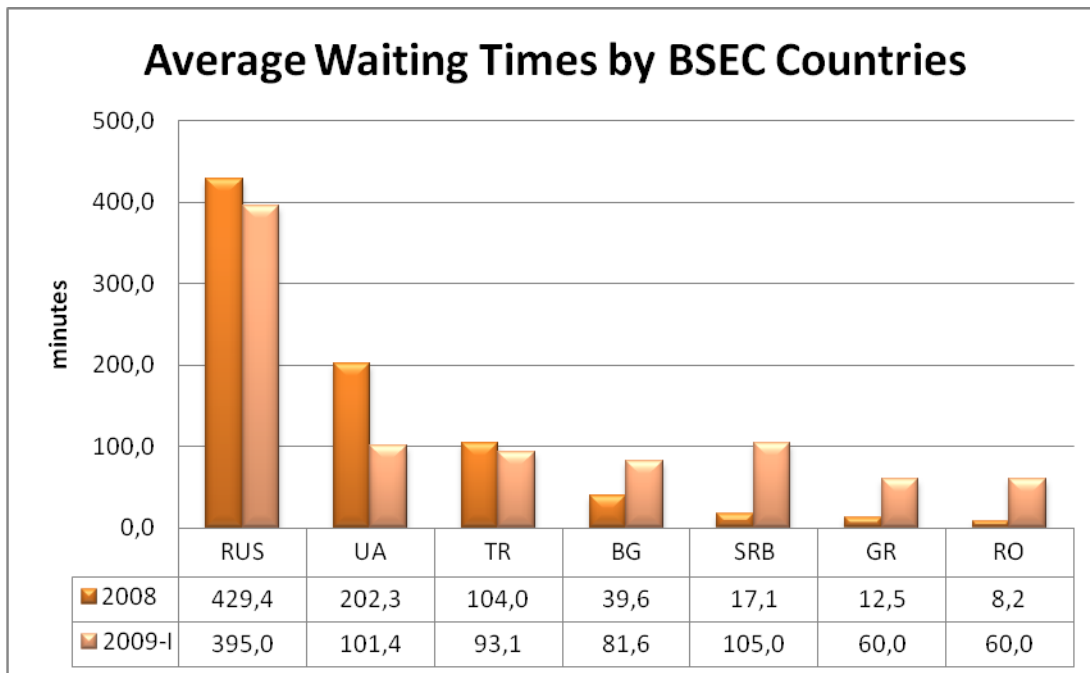


Fig. 11) Average waiting times by country.

Figure 11 shows the average waiting times at borders by country for 8 BSEC countries, whose borders are covered, partially, in the BWTO database, as of 2008 and the first half of 2009.

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 results are given in the table below.

	2003	2004	2005	2006	2007	2008
BSEC Trade	100	139,9	175,9	220,3	289,7	325,0
Internal Waiting Times	100	41,7	158,8	104,8	27,6	46,9
Non-BSEC Trade	100	127,0	154,2	190,4	226,4	267,5
External Waiting Times	100	106,8	173,4	519,4	590,4	323,1
Total BSEC Trade	100	129,0	157,5	195,0	236,0	276,2
Average Waiting Times	100	80,4	167,5	351,1	362,0	211,0

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