

SEVENTEENTH MEETING OF THE BSEC-URTA GENERAL ASSEMBLY

Hotel Radisson BLU Iveria, Tbilisi – GEORGIA
Tuesday, 22 June 2010, at 10:00 hrs

**BSEC OUTLOOK 2009: 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 year 2009 in comparison with previous years.

**I. INTERNATIONAL ROAD TRANSPORT INDUSTRY PERFORMANCE IN THE BSEC REGION
IN THE YEAR 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				80	0	37.000		45	2	120	250	0	37.497	17.050	16	54.563
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																
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

2009	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SRB	TR	UA	BSEC	EU24	Others	Total
AL				115		39.431		59	4	168	278		40.055	15.397	21	55.473
AM				5	140	4			650			150	949	20		969
AZ				20	650		10		5.500		20	400	6.600	1.130	190	7.920
BG*	310					85.625		71.830	8.550	4.270	19.245	135	189.965	102.545	19.125	311.635
GE		7.921	4.380	446		2.422	98	273		26	3.354	2.044	20.964			20.964
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	63	0	24	308	73		201		517	8.091	2.439	4.602	16.318			16.318
RU*		896	5.661	389	7.607	1.589	937	1.516		1.009	2.582	15.460	37.646	523.828	159.814	721.288
SRB																
TR	4.515	132	65.095	23.255	30.987	27.410	1.552	30.577	10.739	5.271		4.385	203.918	176.869	466.249	847.036
UA		561	2.873	7.875	2.210	1.332	25.342	14.450	28.099	2.055	11.410		96.207	369.298	41.525	507.030

Table 2) Road transport operations in BSEC region in 2009.

(*) assuming 20 tons per truck

Figures 1 and 2 show the total international trips in the BSEC region in 2008 and 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 2009, share of 'EU24' operations decreased and share of operations to other destinations increased.

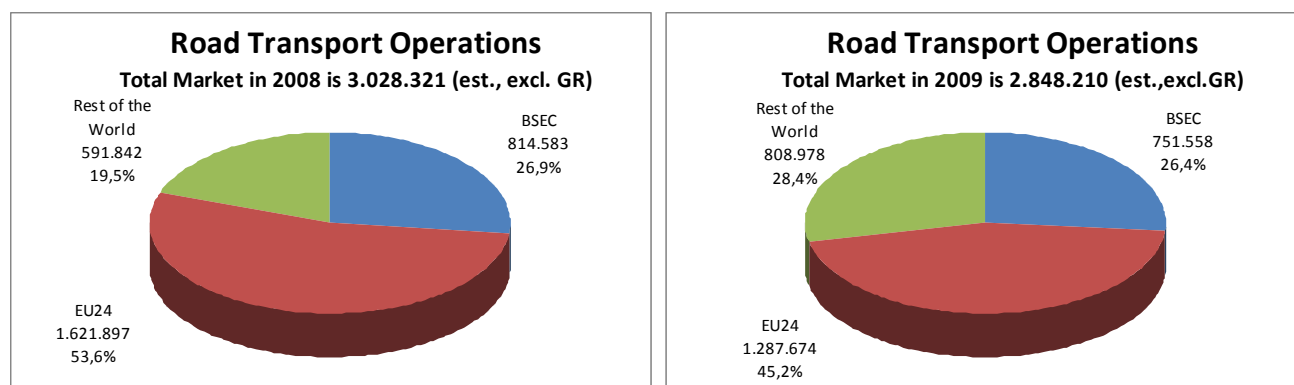


Fig.1) International road transport trips by the BSEC hauliers in 2008. Fig.2) International road transport trips by the BSEC hauliers in 2009.

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

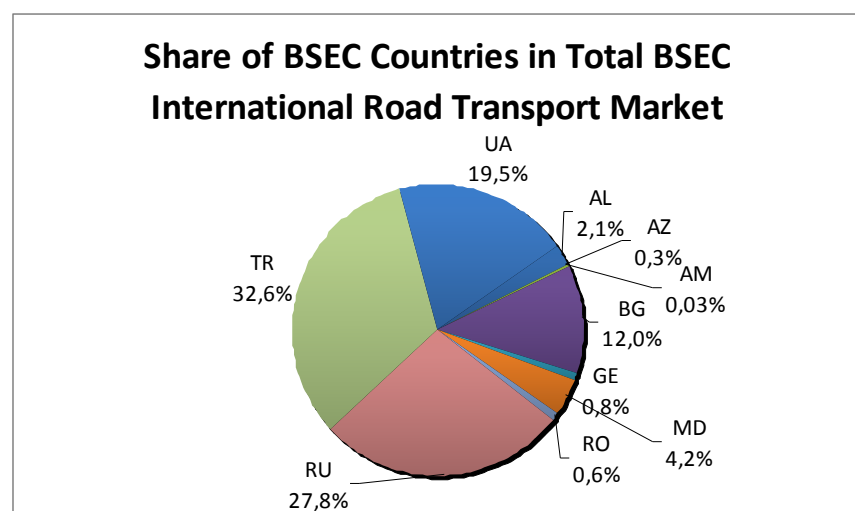


Fig.3) Share of BSEC Countries in the whole BSEC International Road Transport Market in 2009.

Table 3 shows the comparison of the situation at the BSEC International Road Transport Market in 2005-2009. Increased number of trips to the rest of the world with almost 40% growth, resulted from the performance of Russian hauliers to the said destination with 72% growth, and, in other hand, decreased number of trips to EU countries with over 20% downfall, resulted from the performance of Russian (32% downfall) and Turkish (21% downfall) hauliers to the said destination, summed up to the minor 6% decrease of the overall performance of the region. It is much lower than it could be predicted in the previous BSEC-URTA Outlook Report.

	2005	2006	% change to the previous period	2007	% change to the previous period	2008 (*)	% change to the previous period	2009 (*)	% change to the previous period
Total number of trips	3.368.627	3.400.674	0,95	2.538.133	-25,36	3.028.321	19,31	2.848.210	-5,95
Trips within BSEC	755.565	805.614	6,62	728.712	-9,55	814.583	11,78	751.558	-7,74
Trips to EU	1.656.614	1.743.859	5,27	1.222.213	-29,91	1.621.897	32,70	1.287.674	-20,61
Trips to Rest of the World	956.448	851.201	-11,00	587.208	-31,01	591.842	0,79	808.978	36,69
BSEC Trips/Total Trips, %	22,43%	23,69%		28,71%		26,90%		26,39%	

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

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

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 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 (in million USD)
Source: National Statistics Institutes

2009	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SRB	TR	UA	Total with BSEC	Total with World	BSEC /World %
AL				93,9		799,8		42,0	125,0	154,9	304,1	75,2	1.594,9	5.737,6	27,80%
AM				147,1	93,8	31,0		72,9	901,4		179,2	215,8	1.641,1	4.001,9	41,01%
AZ	2,7			137,1	454,9	185,4	6,7	65,1	1.815,9	1,2	1.013,7	695,7	4.378,4	20.818,2	21,03%
BG	96,4	20,9	26,4		355,0	2.976,6	66,6	2.710,0	3.465,3	734,0	2.472,2	1.262,6	14.185,9	39.674,1	35,76%
GE	3,1	130,3	544,2	235,1		74,2	5,5	126,1	310,2	1,8	1.014,2	502,3	2.947,1	5.513,0	53,46%
GR	644,7	11,9	35,7	2.527,8	36,5		47,9	1.396,9	1.596,7	386,9	2.565,8	307,0	9.557,8	79.728,2	11,99%
MD			3,8	54,7	8,6	69,8		551,3	659,7	4,3	205,5	540,1	2.097,8	4.576,0	45,84%
RO	47,6	2,3	83,4	2.831,0	184,9	1.582,7	704,9		2.805,4	823,1	4.052,5	811,3	13.929,0	94.616,0	14,72%
RU		723,2	1.779,5	2.611,3	268,5	2.631,9	1.046,4	2.434,1			19.599,9	22.900,9	53.995,7	469.023,5	11,51%
SRB	76,5	0,9	5,3	589,2	1,7	349,9	18,7	984,3	2.318,4		334,2	450,2	5.129,3	23.922,7	21,44%
TR	278,5	1,1	2.152,3	2.504,8	1.031,6	2.763,8	204,2	4.473,3	22.921,6	362,4		4.189,3	40.882,7	243.054,7	16,82%
UA	76,6	193,8	829,4	547,3	496,0	183,1	745,7	807,6	21.730,8	183,2	3.078,8		28.872,4	85.138,4	33,91%
BSEC Region Total Foreign Trade													179.212,2	1.075.804,5	16,66%

Table 5) Foreign Trade of the BSEC Countries in 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 2009 has reached only two-third of the corresponding indicator in 2008, as was predicted in the last BSEC-URTA Outlook Report.

	2005	2006	% change to prev. period	2007	% change to prev. period	2008	% change to prev. period	2009	% change to prev. period
Foreign Trade Within BSEC	135,71	169,94	25,23	223,49	31,51	251,37	12,47	179,21	-28,71
Total BSEC Foreign Trade	805,62	997,24	23,79	1.207,44	21,08	1.413,11	17,03	1075,80	-23,87
Within BSEC/Total BSEC	16,85%	17,04%		18,51%		17,79%		16,66%	

Table 6) Foreign trade of the BSEC region in 2005-2009.

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 2009 is presented below.

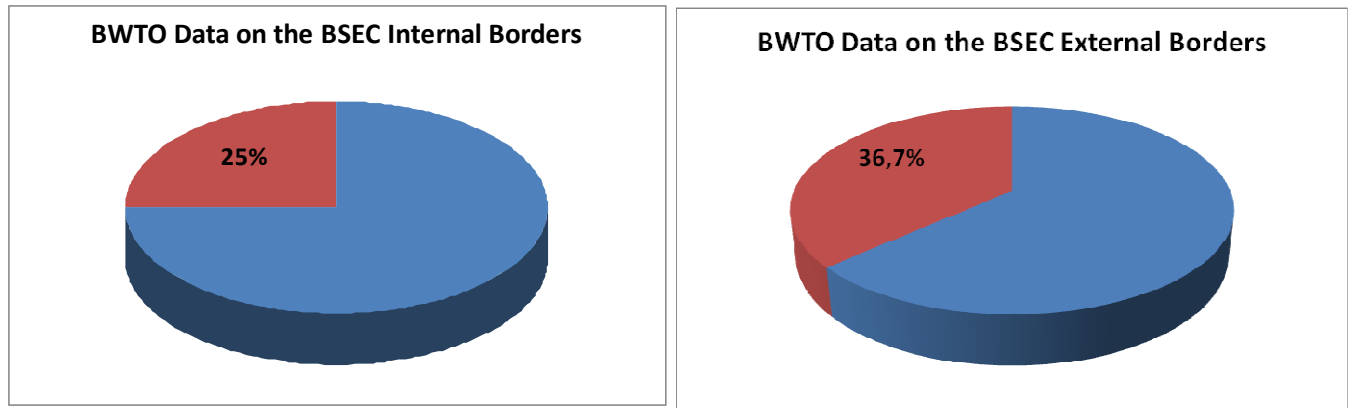


Fig. 4) BWTO Data on the BSEC Internal (5 out of 20) and External (11 out of 30) borders.

The data coverage of BSEC internal and external borders in 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 2009, with the average value of 253,6 minutes (see Fig.5).

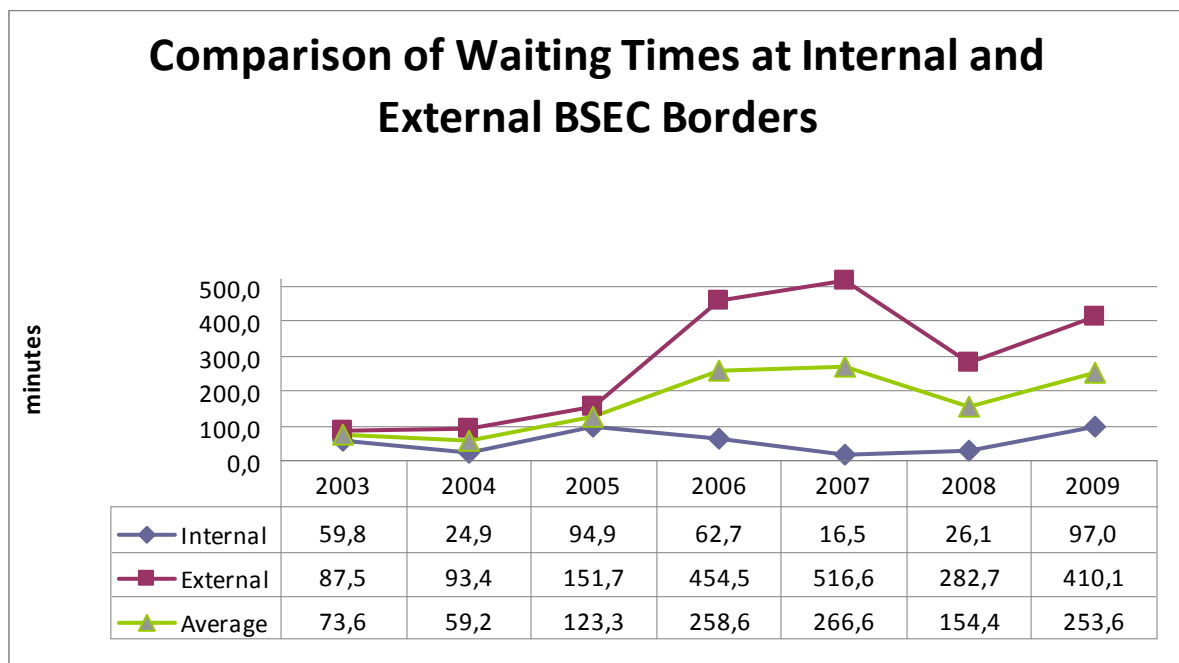


Fig. 5) Comparison of waiting times at Internal and External BSEC borders, and their average.

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	% 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%	108,3	
BG-RO	52,0	14,0	-73,1%	30,4	117,3%	28,7	-5,7%	0,3	-99,0%	21,0	7536,4%		
BG-SRB	90,0	7,0	-92,2%	269,9	3755,3%	115,3	-57,3%	18,0	-84,4%	38,0	111,1%	135,4	256,3%
BG-TR	30,0	35,0	16,7%	83,4	138,4%	81,6	-2,2%	81,0	-0,8%	104,0	28,4%	121,2	16,6%
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%	97,0	271,9%

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 three because of lack of data for BG-RO, RO-SRB and RO-MD borders in 2009.

In 2009, waiting times are observed to increase significantly at all internal BSEC borders.

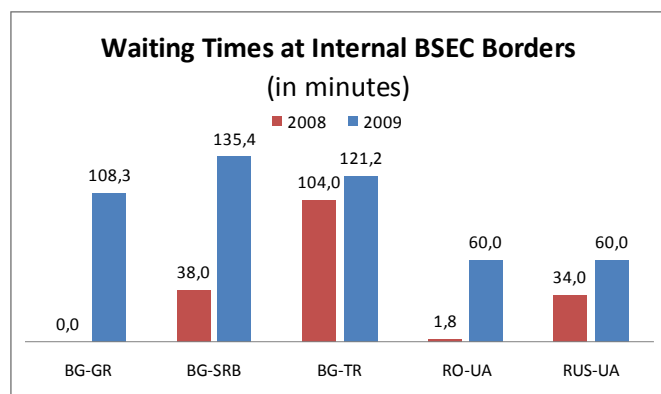


Fig. 6) Waiting times at Internal BSEC Borders

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			% 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%	1648,6	1935,0	1791,8	47,8%
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%	203,4	145,6	174,5	-74,0%
UA-HUN		97,5		41,3	-57,6%	355,0	759,4%	171,0	-51,8%	158,74	195,63	177,2	3,6%	111,7	80	95,9	-45,9%
UA-SLO	172,5	65,5	-62,0%	26,6	-59,4%			600,0		221,03	317,07	269,1	-55,2%	120,0	241,4	180,7	-32,8%
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%	113,5	73,5	93,5	165,9%
SRB-HUN				97,5				15,2		10,4	9,26	9,8	-35,2%	29,6	21,6	25,6	160,4%
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%				
RUS-LT								584,8		500,18	343,29	421,7	-27,9%	453,4	483,7	468,6	11,1%
RUS-LV								1758,8			394,91	394,9	-77,5%	377,6	852,9	615,3	55,8%
RUS-PL								223,4		421,65	316,67	369,2	65,3%	289,1	370,2	329,7	-10,7%
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%	370,7	426,4	410,1	45,0%

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

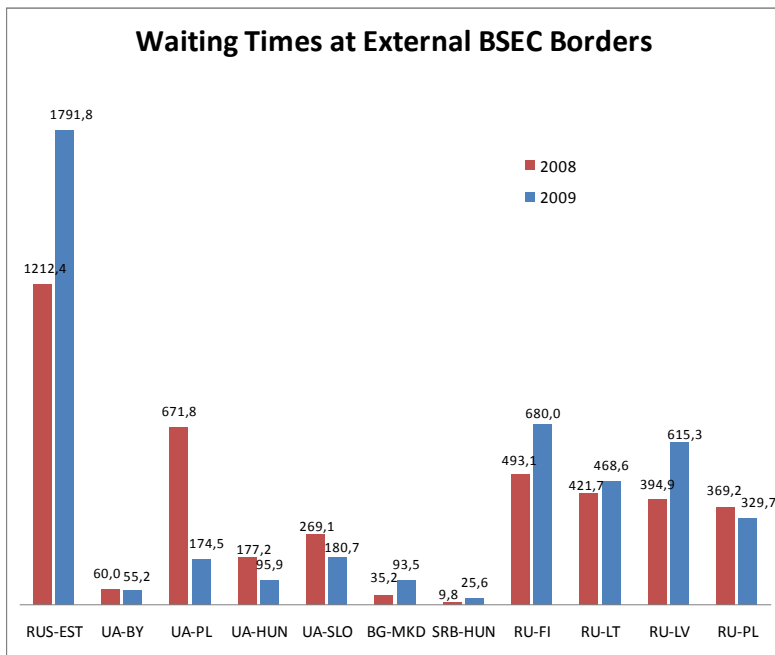


Fig. 8) Waiting times at External BSEC Borders (in minutes)

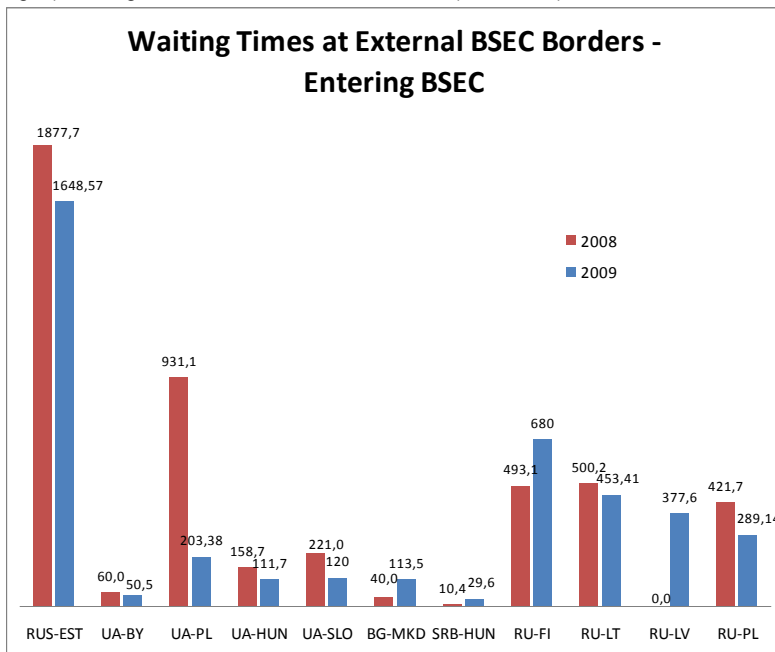


Fig. 9) Waiting times at External BSEC Borders - Entering BSEC

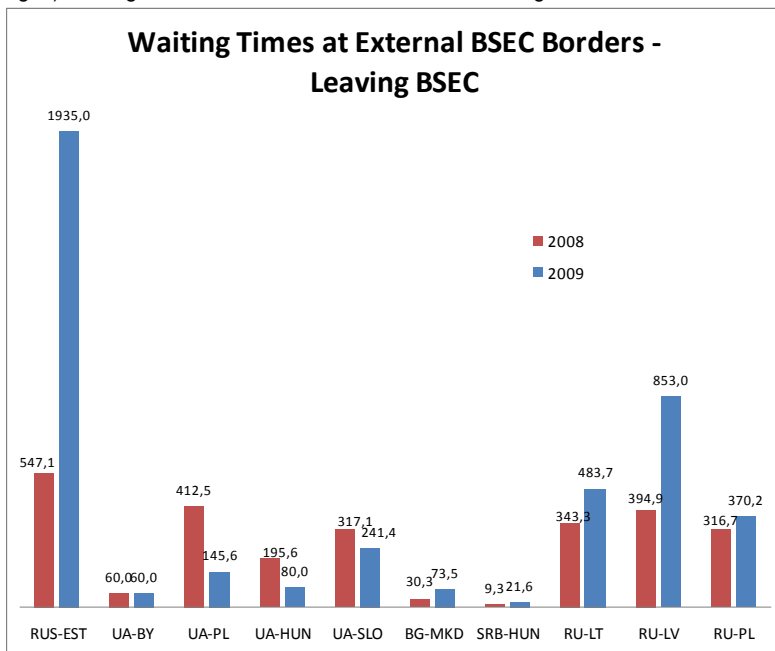


Fig. 10) Waiting times at External BSEC Borders – Leaving BSEC

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 RUS-BY borders in 2009, therefore the BWTO coverage of external BSEC borders decreased to 36,7%.

Average waiting time at external BSEC borders in 2009 was 410,1 minutes, almost twice higher than in 2008.

At five borders situation observed to be improved while the rest six borders demonstrate degradation of corresponding indicators.

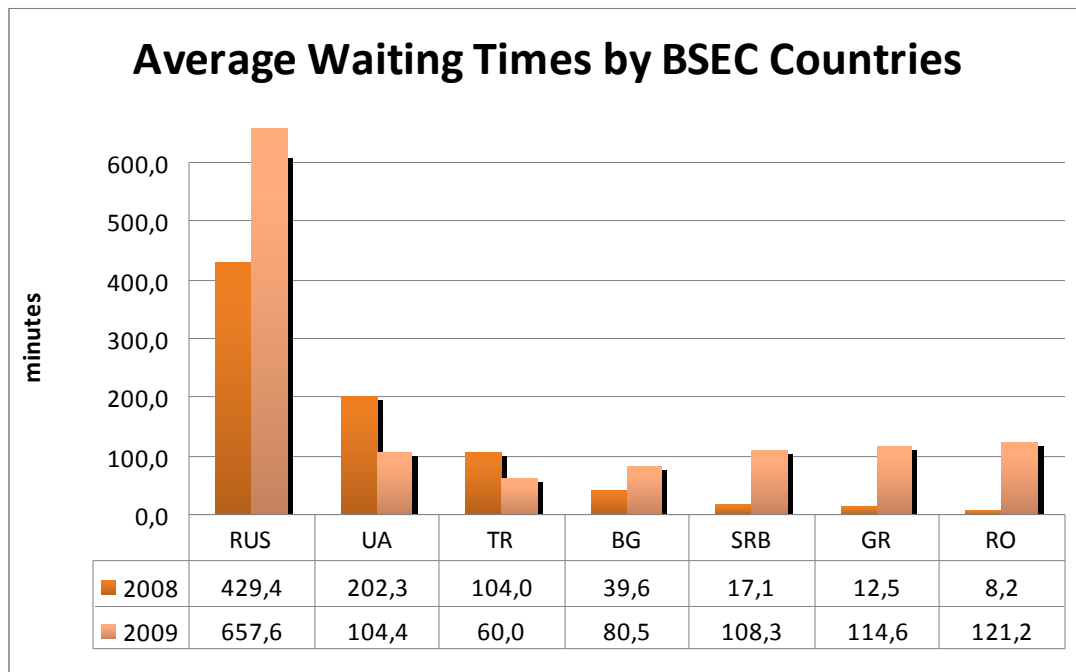


Fig. 11) Average waiting times by country.

Figure 11 shows the average waiting times at borders by country for 7 BSEC countries, whose borders are covered, partially, in the BWTO database, as of 2008 and 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	2009
BSEC Trade	100	139,9	175,9	220,3	289,7	325,8	232,3
Internal Waiting Times	100	41,7	158,8	104,8	27,6	43,7	162,3
Non-BSEC Trade	100	127,0	154,2	190,4	226,4	267,4	206,3
External Waiting Times	100	106,8	173,4	519,4	590,4	323,1	468,7
Total BSEC Trade	100	129,0	157,5	195,0	236,0	276,2	210,3
Average Waiting Times	100	80,4	167,5	351,1	362,0	209,7	344,4

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