

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

Room B, Centre de Conférences Varembe (CCV)  
Geneva - Switzerland  
Wednesday, 03 November 2010, at 15:00 hrs

**BSEC OUTLOOK 2010-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 2010 in comparison with previous years.

**I. INTERNATIONAL ROAD TRANSPORT INDUSTRY PERFORMANCE IN THE BSEC REGION  
IN THE FIRST HALF OF 2010**

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

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	0	134	61	10.014	125	2.331		8.288	29.093	577	12.815	8.011	71.449	12.043	5.360	88.852
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 1) Road transport operations in BSEC region in 2009 (updated).

(\*) assuming 20 tons per truck

2010-I	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SRB	TR	UA	BSEC	EU24	Others	Total
AL		0	0	72	0	23.614	0	25	2	60	203	0	23.976	14.032	11	38.019
AM																
AZ				8	350			20	3.500		7	250	4.135	630	90	4.855
BG*					760	13.070		8.190		3.095	6.560		31.675	19.415	3.555	54.645
GE	0	3.903	3.127	145		538	110	140	0	6	1.477	1.564	11.010			11.010
GR																
MD	0	4	17	5.986	47	831		4.428	11.927	258	5.496	3.924	32.918	5.449	2.337	40.704
RO	2	26	9		43				416	518		1.875	2.889			2.889
RU*	0	402	4.816	134	3.335	853	332	1.790		506	2.007	7.564	21.739	264.650	74.778	361.167
SRB																
TR	2.521	32	73.877	10.065	22.935	14.099	1.055	22.067	9.056	2.578		2.713	160.998	187.705	431.778	780.481
UA		552	2.551	6.342	2.539	1.498	17.469	11.995	20.845	1.446	7.963		73.200	303.677	87.607	464.484

Table 2) Road transport operations in BSEC region in the first half of 2010.

(\*) assuming 20 tons per truck

Figures 1 and 2 show the total international trips in the BSEC region in 2009 and 2010-I. 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 operations to destinations other than BSEC or EU24 has significantly increased from 29% to 36%.

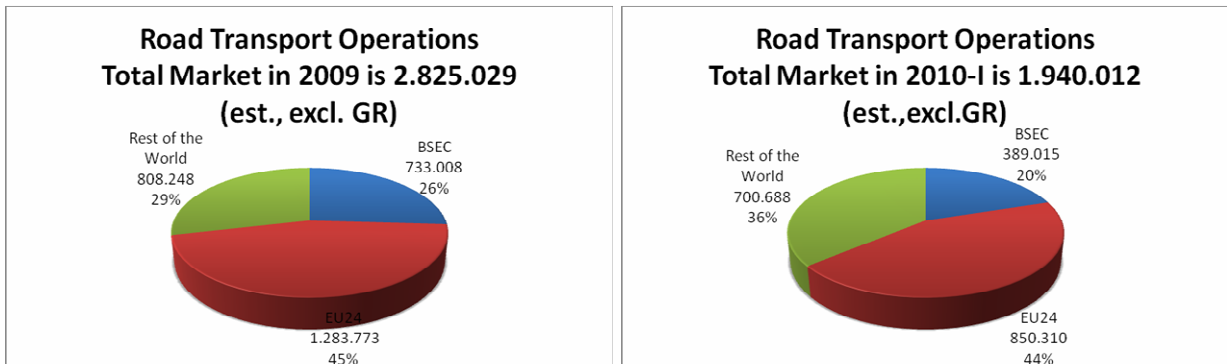


Fig.1) International road transport trips by the BSEC hauliers in 2009.Fig.2) International road transport trips by the BSEC hauliers in 2010-I.

Figure 3 shows the share between BSEC Countries in the whole international road transport market of the BSEC Region according to data for the 2010-I. Since there were no data provided for AM, GR and SRB, these countries are not included in the chart.

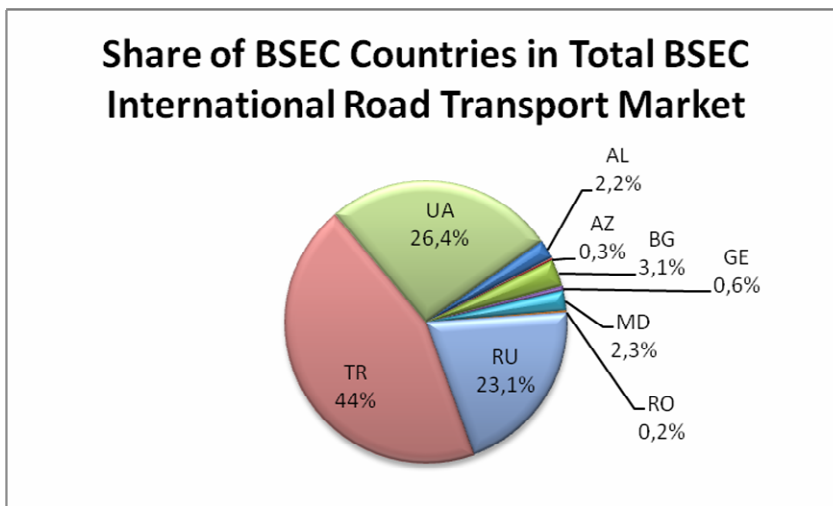


Fig.3) Share of BSEC Countries in the whole BSEC International Road Transport Market in 2010-I.

Table 3 shows the comparison of the situation at the BSEC International Road Transport Market in 2005-2010. Total number of trips during the first half of the 2010 has already reached almost 70% of that figure in 2009. It is noteworthy that the number of trips to the rest of the world is already at the last year's level.

	2005	2006	% change to the previous period	2007	% change to the previous period	2008	% change to the previous period	2009 (upd.)	% change to the previous period	2010-I (*)	% weight to the previous period
<b>Total number of trips</b>	3.368.627	3.400.674	0,95	2.538.133	-25,36	3.028.321	19,31	2.825.029	-6,71	1.940.012	68,67
<b>Trips within BSEC</b>	755.565	805.614	6,62	728.712	-9,55	814.583	11,78	733.008	-10,01	389.015	53,07
<b>Trips to EU</b>	1.656.614	1.743.859	5,27	1.222.213	-29,91	1.621.897	32,70	1.283.773	-20,85	850.310	66,24
<b>Trips to Rest of the World</b>	956.448	851.201	-11,00	587.208	-31,01	591.842	0,79	808.248	36,56	700.688	86,69
<b>BSEC Trips/Total Trips, %</b>	22,43%	23,69%		28,71%		26,90%		25,95%		20,05%	

Table 3) Comparative table of the BSEC International Road Transport Market in 2005-2010.

(\*) Estimated data, preserves the tendency of the region excluding AM, 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 2009 and in 2010-I is presented in the tables below.

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%
<b>BSEC Region Total Foreign Trade</b>													<b>179.212,2</b>	<b>1.075.804,5</b>	<b>16,66%</b>

Table 4) Foreign Trade of the BSEC Countries in 2009 (in million USD)  
Source: National Statistics Institutes

2010-I	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SRB	TR	UA	Total with BSEC	Total with World	BSEC /World %
AL						344,2			60,9		155,5	20,6	581,2	2.965,8	19,60%
AM				125,2	40,9	14,9		42,8	447,0		86,5	113,2	870,6	2.166,8	40,18%
AZ													2.765,0	13.147,1	21,03%
BG	46,1	10,0	13,7		185,2	1.399,5	33,4	1.540,6	2.104,3	442,8	1.404,6	543,0	7.723,2	20.615,2	37,46%
GE	1,0	89,3	298,9	81,6		37,2	5,1	75,0	151,5	0,5	496,5	287,0	1.523,5	2.949,6	51,65%
GR	307,5	5,8	4,5	1.205,0	24,7		34,6	668,8	971,7	205,6	1.241,7	123,5	4.793,5	36.464,7	13,15%
MD			2,2	25,8	6,3	57,3		268,0	423,3		128,2	253,5	1.164,6	2.297,1	50,70%
RO	33,8	4,1	105,5	1.551,6	99,6	784,5	339,5		1.858,4	435,7	2.662,0	578,9	8.453,7	36.464,7	23,18%
RU		363,7	752,4	1.582,9	125,5	1.650,4	702,8	1.511,0			12.001,8	15.929,1	34.619,6	283.783,2	12,20%
SRB				366,5		195,5		511,9	1.243,6		185,7	217,3	2.720,5	12.194,7	22,31%
TR	141,0	2,4	1.114,2	1.513,2	500,9	1.338,0	108,0	2.865,1	12.397,5	202,1		2.575,8	22.758,2	138.184,9	16,47%
UA	19,7	91,7	801,8	279,2	279,3	117,3	355,1	586,5	15.146,4	124,0	2.017,4		19.818,6	48.711,3	40,69%
<b>BSEC Region Total Foreign Trade</b>													<b>107.792,3</b>	<b>599.945,2</b>	<b>17,97%</b>

Table 5) Foreign Trade of the BSEC Countries in 2010-I (in million USD)  
Source: National Statistics Institutes  
Figures in red are estimations.

The following table shows different foreign trade indicators of the BSEC region in 2005-2010, and percentage changes between periods. The volume of the foreign trade in the first half of 2010 is more than a half of the corresponding indicator in 2009, and the share of the foreign trade within BSEC in the total BSEC foreign trade has increased and reached its level in 2008.

	2005	2006	% change to prev. period	2007	% change to prev. period	2008	% change to prev. period	2009	% change to prev. period	2010-I	% weight 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	107,79	60,15
Total BSEC Foreign Trade	805,62	997,24	23,79	1.207,44	21,08	1.413,11	17,03	1075,80	-23,87	599,95	55,77
Within BSEC/Total BSEC	16,85%	17,04%		18,51%		17,79%		16,66%		17,97%	

Table 6) Foreign trade of the BSEC region in 2005-2010.

### 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 2010-I is presented below.

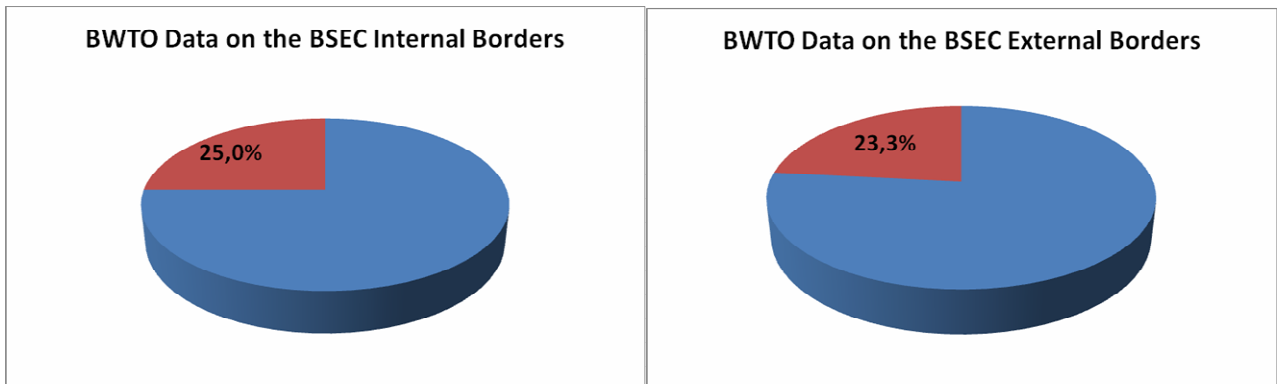


Fig. 4) BWTO Data on the BSEC Internal (5 out of 20) and External (5 out of 30) borders.

The data coverage of BSEC internal and external borders in 2010-I has decreased to percentages illustrated in Fig.4.

In average, waiting times at BSEC borders have increased both at internal and external borders in 2010-I, with the average value of 495,1 minutes (see Fig.5).

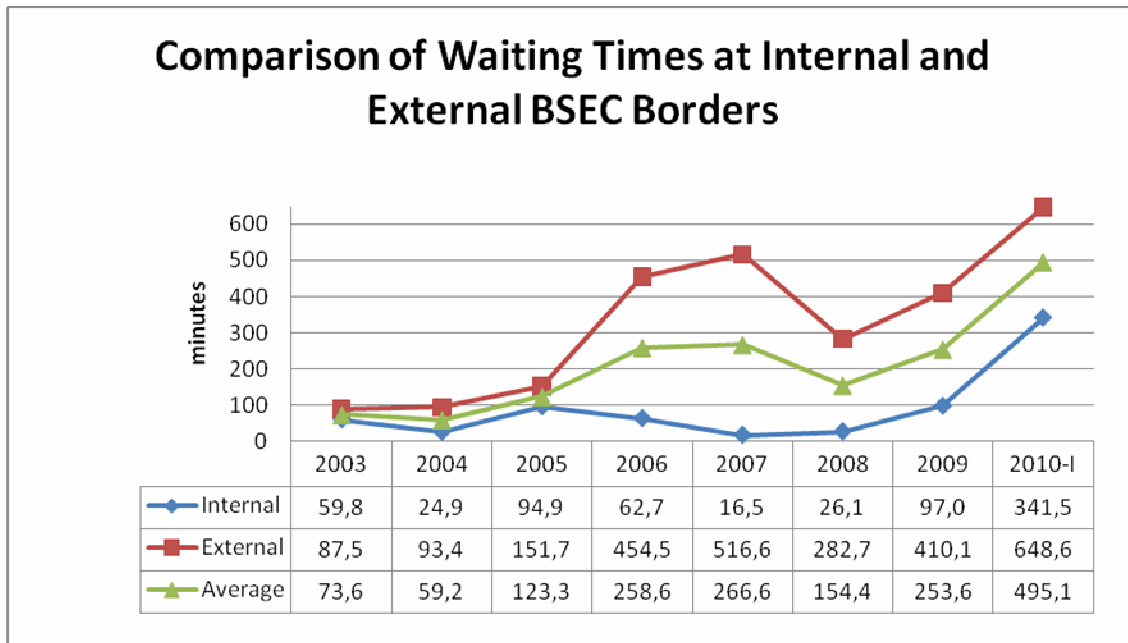


Fig. 5) Comparison of waiting times at Internal and External BSEC borders, and their average.

## SITUATION AT BSEC INTERNAL BORDERS

	2003	2004	2005	2006	% change to the prev. period	2007	% change to the prev. period	2008	% change to the prev. period	2009	% change to the prev. period	2010-I	% change to the previous period
BG-GR	67,0	56,5	141,6	120,0	-15,2%	0,0	-100,0%	0,0	0,0%	108,3			
BG-RO	52,0	14,0	30,4	28,7	-5,7%	0,3	-99,0%	21,0	7536,4%				
BG-SRB	90,0	7,0	269,9	115,3	-57,3%	18,0	-84,4%	38,0	111,1%	135,4	256,3%		
BG-TR	30,0	35,0	83,4	81,6	-2,2%	81,0	-0,8%	104,0	28,4%	121,2	16,6%	105,0	-13,4%
RO-SRB		20,0	18,8	15,0	-20,0%	8,5	-43,3%	8,0	-5,9%			137,5	
RO-UA		17,0	25,5	15,9	-37,8%	4,0	-74,8%	1,8	-55,5%	60,0	3270,8%	465,0	675,0%
RO-MD						4,0		1,9	-53,3%			4,0	
RUS-UA								34,0		60,0	76,5%	996,0	1560,0%
average	59,8	24,9	94,9	62,7	-33,9%	16,5	-73,6%	26,1	57,7%	97,0	271,9%	341,5	252,1%

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 is five, there is lack of data for Bulgarian borders with GR, RO and SRB in 2010-I.

In 2010-I, waiting times are observed to increase significantly.

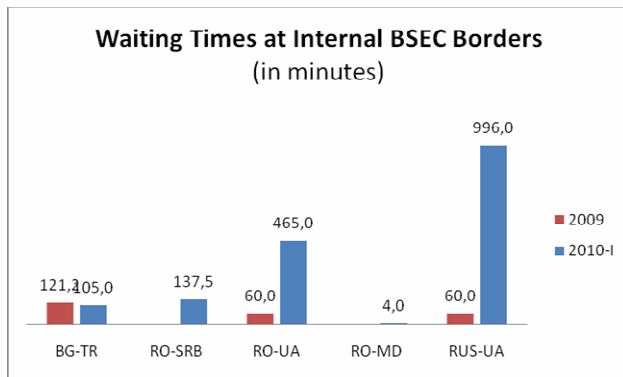


Fig. 6) Waiting times at Internal BSEC Borders

## SITUATION AT BSEC EXTERNAL BORDERS

	2003	2004	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	2010-I			% change to the previous period
	average	average	average	average		average		average		in BSEC	out BSEC	average		in BSEC	out BSEC	average	
RUS-EST		241,0	998,6	1602,8	60,5%	2506,5	56,4%	1212,4	-51,6%	1648,6	1935,0	1791,8	47,8%	-	2576,9	2577,0	43,8%
UA-BY		27,5	21,7					60,0		50,5	60,0	55,2	-8,0%	-	-	-	
UA-PL	60,0	197,0	97,1	265,5	173,3%	382,1	43,9%	671,8	75,8%	203,4	145,6	174,5	-74,0%	397,0	274,9	336,0	92,6%
UA-HUN		97,5	41,3	355,0	759,4%	171,0	-51,8%	177,2	3,6%	111,7	80	95,9	-45,9%	64,1	120,0	92,1	-4,0%
UA-SLO	172,5	65,5	26,6			600,0		269,1	-55,2%	120,0	241,4	180,7	-32,8%	-	-	-	
RO-HUN	107,5	59,0	68,7	42,0	-38,9%	2,8	-93,4%	8,4	203,8%					-	-	-	
SRB-MKD		60,0	61,5			16,7		12,4	-25,5%					-	-	-	
GR-MKD		63,5	65,0			70,8		25,0	-64,6%					-	-	-	
BG-MKD	10,0	30,0	38,8	7,0	-81,9%	38,7	452,9%	35,2	-9,1%	113,5	73,5	93,5	165,9%	-	-	-	
SRB-HUN			97,5			15,2		9,8	-35,2%	29,6	21,6	25,6	160,4%	17,5		17,5	-31,6%
RUS-FI						768,3		493,1	-35,8%	680,0		680,0	37,9%	-	-	-	
RUS-BY						93,8		80,5	-14,2%					-	-	-	
RUS-LT						584,8		421,7	-27,9%	453,4	483,7	468,6	11,1%		339,0	339,0	-27,6%
RUS-LV						1758,8		394,9	-77,5%	377,6	852,9	615,3	55,8%	1152,0	425,6	788,8	28,2%
RUS-PL						223,4		369,2	65,3%	289,1	370,2	329,7	-10,7%		390,0	390,0	18,3%
average	87,5	93,4	151,7	454,5	199,6%	516,64	13,7%	282,71	-45,3%	370,7	426,4	410,1	45,0%	407,7	687,8	648,6	58,2%

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

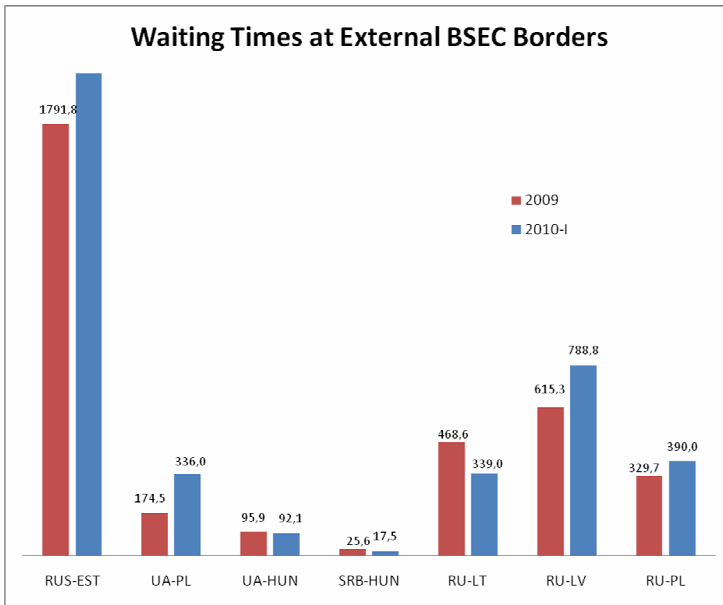


Fig. 8) Waiting times at External BSEC Borders (in minutes)

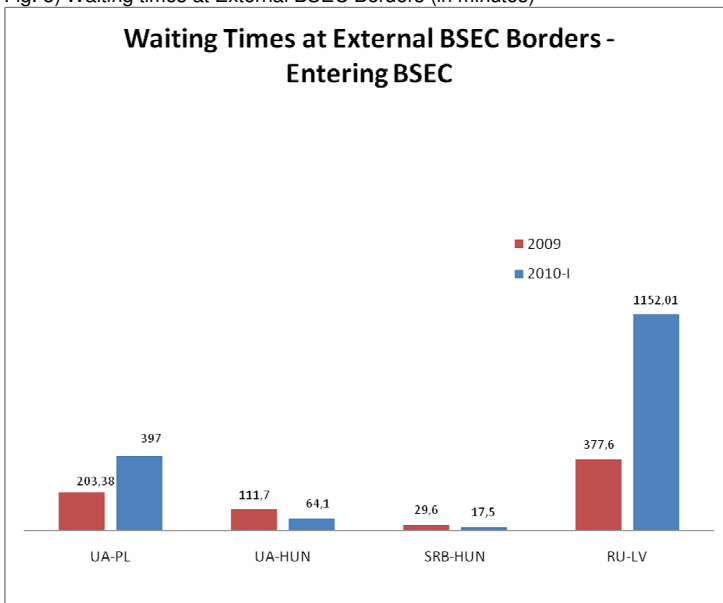


Fig. 9) Waiting times at External BSEC Borders - Entering BSEC

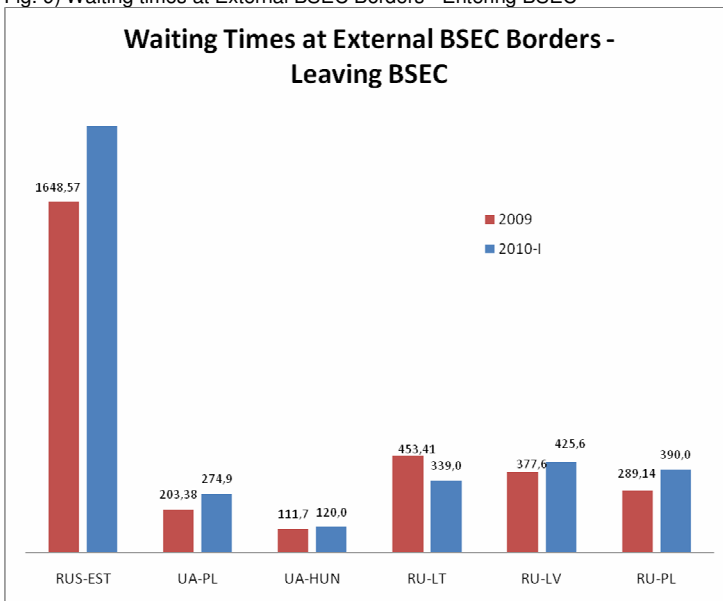


Fig. 10) Waiting times at External BSEC Borders – Leaving BSEC

Table 8 and Figures 8-10 illustrate the situation at external BSEC borders. There were no available data for UA-BY, UA-SLO, RO-HUN, SRB-MKD, GR-MKD, BG-MKD, RUS-FI and RUS-BY borders in 2010-I, therefore the BWTO coverage of external BSEC borders decreased to 23,3%.

Average waiting time at external BSEC borders in 2010-I was 648,8 minutes, almost 60% higher than in 2009.

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

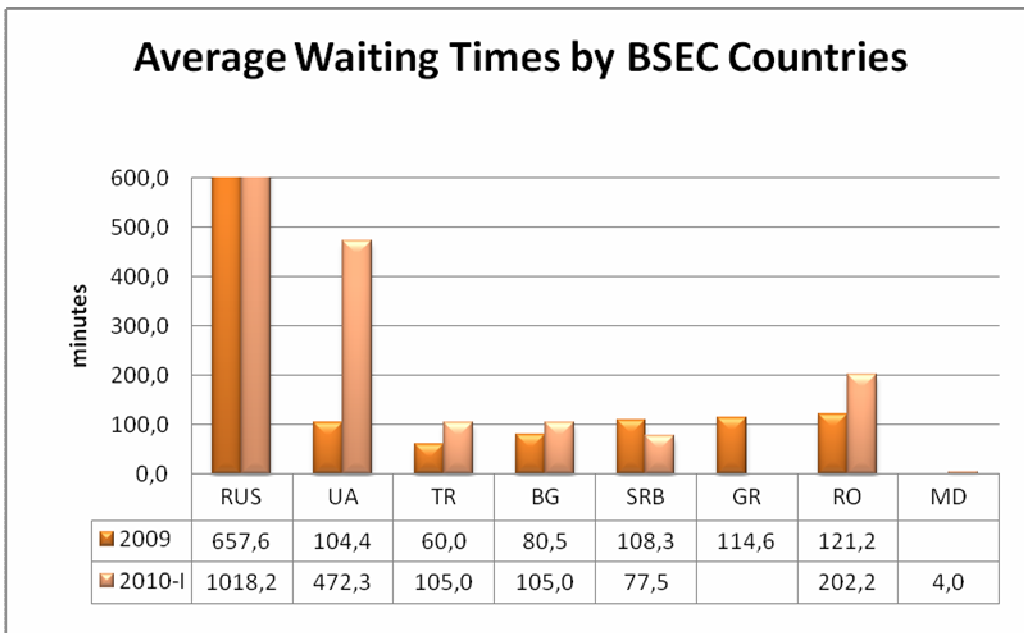


Fig. 11) Average waiting times by country.

Figure 11 shows the average waiting times at borders by country for 8 BSEC countries, whose borders are covered, partially, in the BWTO database, as of 2009 and 2010-I.

#### 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
<b>BSEC Trade</b>	100	139,9	175,9	220,3	289,7	325,8	232,3
<b>Internal Waiting Times</b>	100	41,7	158,8	104,8	27,6	43,7	162,3
<b>Non-BSEC Trade</b>	100	127,0	154,2	190,4	226,4	267,4	206,3
<b>External Waiting Times</b>	100	106,8	173,4	519,4	590,4	323,1	468,7
<b>Total BSEC Trade</b>	100	129,0	157,5	195,0	236,0	276,2	210,3
<b>Average Waiting Times</b>	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.