

Group of Experts on Euro-Asian Transport Links, 5th session

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“ Updating the EATL priority transport infrastructure projects and developing an international investment plan under EATL Project Phase II”:
Existing Statistics, Flows and Trends on EATL

Routes

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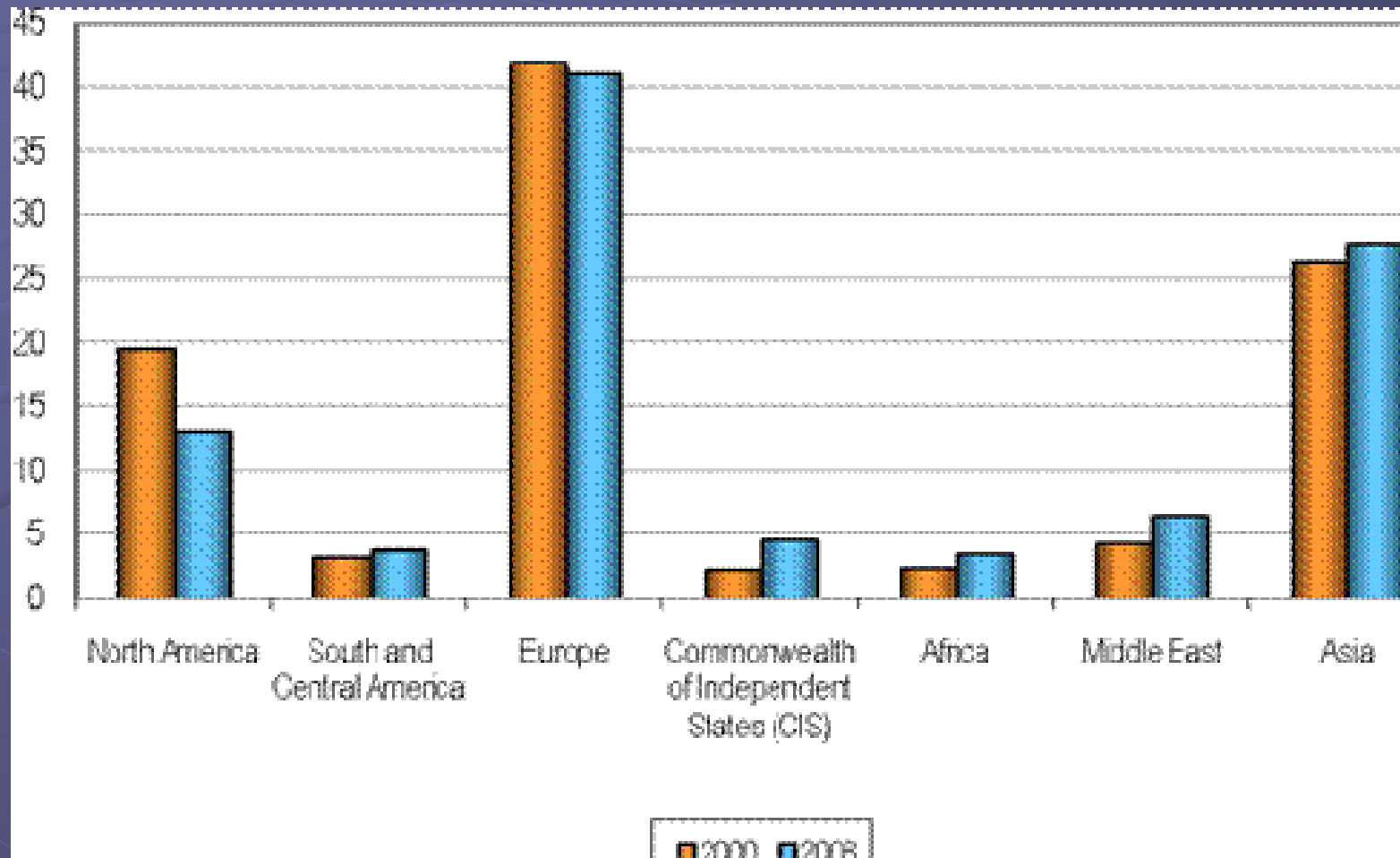
Introduction

- *Task: Conduct desk review, collection and consolidation of existing statistics, flows and trends on EATL routes, both maritime and inland transport*

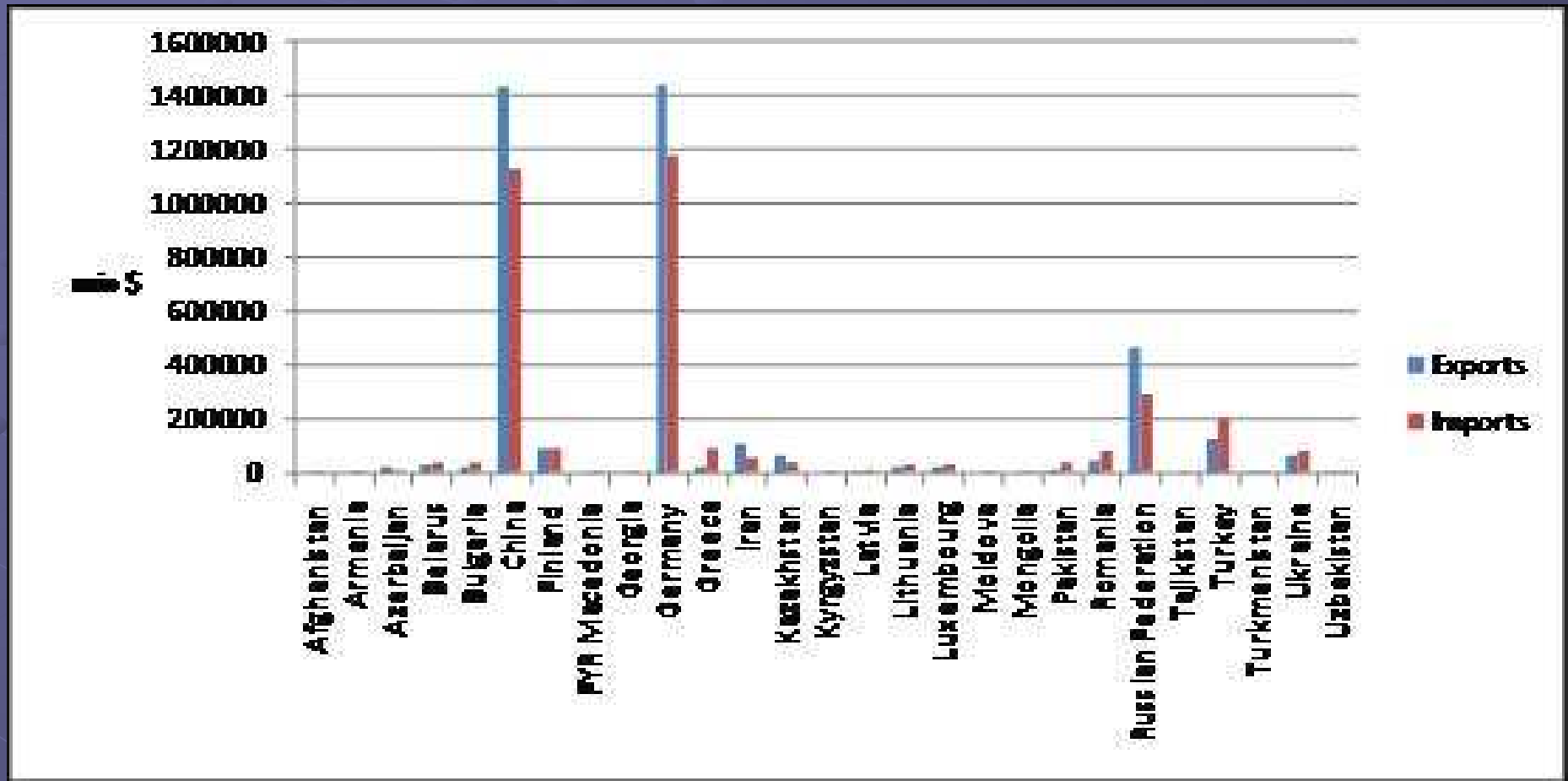
Main Sources of Data Collection

- World Trade Organization (WTO Report 2010)
- Euro stat (2009)
- Asian Development Bank Institute (2010)
- CAREC-Central Asia Regional Economic Cooperation (2008)
- EUCAM-EU Central Asia Monitoring (2010)
- ASEM-Asia-Europe Meeting 2008(Bi-annual informal dialogue process initiated in 1996 among European and Asian governments)
- UNCTAD-Review of Maritime Transport 2009
- UNECE report -Hinterland Connections of Seaports (2010)
- ESCAP, Economic and Social Commission for Asia and the Pacific. "Review of developments in transport in Asia and the Pacific 2009", United Nations, New York 2009
- Countries provided data

Regional share in world merchandise exports 2000-2008



Merchandise Trade of Exports-Imports (2008) within EATL Countries



Conclusions: Analysis of traffic flows

- ***a high percentage of Asian exports to Europe***, representing mainly China's domination in Asia's trade with Europe
- imports are divided between Europe and Asia, stipulating the growth of Asia's intra-region trade.
- Potential intra-trade:
 - Afghanistan-Pakistan
 - Iran-China
 - Mongolia-China

Conclusions: Analysis of traffic flows

- the highest share of EATL CIS countries' exports and imports is to and from the European countries.
- Russian Federation' trade with other CIS countries, such as Kazakhstan, Kyrgyzstan, Moldova, Tajikistan, and Turkmenistan
- Other connections:
 - Belarus-Ukraine
 - Moldova-Ukraine
 - Tajikistan-Uzbekistan

Conclusions: Analysis of traffic flows

Furthermore EATL routes should serve the following connections:

- Kazakhstan-China
- Kyrgyzstan-China
- Russian Federation-China
- Russian Federation-Mongolia

Current Issues and Recommendations

- Maritime transport is the dominant transport mode for Euro-Asian trade flows to date
- Increase of productivity reduce the number of ports-----concentration on specific ports
- the existing capacity of ports is insufficient, with several of them rapidly approaching full capacity
- concern for congestion and saturation problems with regard to land access to ports, as well as safety and security issues from maritime traffic
- There is trade imbalance, with a large number of empty containers being transported.

Current Issues and Recommendations

- The above findings call for the diversification of existing routes and the opening up of alternative ones between Europe and Asia
- Today, land transport is positioned as a link in the chain of maritime transport as means of access to ports,
- It is also the primary mode of transport over long distances across Russia and Central Asia to China.
- Land transport (especially rail) is lacking between Asian EATL countries and Europe

Current Issues and Recommendations

- Efficient rail service is becoming the best option for port hinterland extensions.
- Trans-continental Eurasian land corridors will never be competitive to maritime transportation of trade between the Europe and China.
- There is, however, a niche market for land transport
- Land transport is the only option for land locked countries, either as direct link to Europe/ other EATL countries or through efficient connections with ports (maritime, inland waterways)

Current Issues and Recommendations

- The main barrier to the development of rail transport alternative is the price of such services, which would probably be significantly higher than current container transport by sea.
- with the improvement of the operating conditions of existing rail infrastructure in terms of line modernisation, longer trains, better utilisation of rolling stock and personnel, together with the development of new missing links, rail costs may well reduce substantially

Current Issues and Recommendations

- Finally, the potential value of road transport should not be ruled out, including long distances, as demonstrated by Turkish freight services to Central Asia
- This might be of value for expanding intra-regional trade, since it provides denser coverage to link main inland points of trade concentration. In addition, road haulage substitutes that of rail in the cases where there are geographical barriers to rail operation, as is the case of Turkish haulage services to Central Asia.



Thank you for your attention!