



DEVELOPMENT TRENDS OF THE EURASIAN CARGO TRANSPORT

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Abstract

The issues of the development of the world economy and world trade in connection with freight traffic in the Eurasian direction are considered in the article. The volumes of cargo transportation within the EU, between the EU and China, Russia and the Republic of Belarus have been investigated. The results of the study showed that the volumes of freight transported by road are declining, while rail and sea transport is growing, and the volumes of transport by sea are growing at a faster rate. This trend corresponds to the transport policy of the European Union. Land transport cannot compete with maritime transport, either in terms of traffic or in value. Therefore, it is economically expedient to transport expensive goods with a relatively small weight and volume. The analysis of the volumes of both transit traffic through Belarus and the export-import cargo of the Republic of Belarus shows a significant decrease in the last few years. Recommendations, for increasing the flow of goods through the territory of Belarus, are proposed to realize its transit potential

Keywords: *Flow of cargo; cargo turnover; freightage; carrier; transportation; International Economics; Global Trade; transport corridor; exports; imports.*

1 INTRODUCTION

The analytical forecast for the development of the international economics confirmed that in 2017 the world community faced structural and cyclical changes while retaining its not always stable

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balance. This state of the global economy is caused by a slowdown in GDP growth of developed and developing countries. Despite the fact that the GDP of Europe grew by 2.0% in 2015 after monetary stimulation and low oil prices the growth was only 1.8% by the results of 2016 (Molokovitch, 2017). Extremely slight economic growth resumed in all EU countries, except Greece. It is expected that economic growth in the EU countries will drop to 1.4% in 2017 (Verbitsky,



2017). The reason for the decline in economic indicators is likely to be the decision of the UK to withdraw from the EU.

There is a decrease in GDP of USA as well. According to forecasts, it will have recovered by 2018 and the rate of GDP growth will amount 2.5%. Japan's GDP growth has almost stopped. The growth of the largest emerging economy

[China] is also continuing to slow. In 2016 this indicator was 6.7%, but it is expected that in 2017 it will be even lower - 6.5%. The Indian economy is moving ahead with the projected growth of 7.4% in 2017 (Drozdov, 2017).

At this time world trade will gain momentum, slightly outstripping the growth of world GDP (Table 1).

Table 1 – Dynamics of GDP and World Trade, % according to the IMF forecast

Growth to the previous year, %	Actual value	Estimated value	Forecast of January 2017	
	2015	2016	2017	2018
World GDP	3.2	3.1	3.4	3.6
Developed countries	2.1	1.6	1.9	2.0
USA	2.6	1.6	2.3	2.5
Eurozone	2.0	1.7	1.6	1.6
Japan	1.2	0.9	0.8	0.5
United Kingdom	2.2	2.0	1.5	1.4
Developing countries	4.1	4.1	4.5	4.8
Russia	-3.7	-0.6	1.1	1.2
China	6.9	6.7	6.5	6.0
India	7.6	6.6	7.2	7.7
Vietnam	6.7	6.7	-	-
World trade (goods and services)	2.7	1,9	3.8	4.1
Developed countries	4.0	2.0	3.6	3.8
Developing countries	0.3	1.9	4.0	4.7

Source: Molokovitch (2017)

Thus, the growing economies of China, Vietnam, India, as well as developed European countries, require more raw materials, and European countries that produce modern high-tech engineering products will ensure the needs of the developing economies of China, Russia, Kazakhstan, Belarus, and other post-Soviet republics. Consequently, the volume of cargo transportation will continue to grow.

2 ANALYSIS OF THE CARGO TRANSPORTATION BETWEEN EUROPE AND THE ASIAN-PACIFIC REGION

The Study of trends in the development of the economy of Europe and its particular countries, as well as the volume of trade between Europe and the Asian Economic Region, allows us to assess the volume of freight flows following towards the EU - the Asia-Pacific region and vice versa, as well as the prospects for the development of transport

and logistics, in the region as a whole, and in the Republic of Belarus.

It should be noted that there is a growth of cargo transportation in this direction. In 2016, the EU countries increased the volume of transportation of export goods by 3.8% in comparison with the previous year. 70% of that volume fell to the countries of the Asia-Pacific region, in the USA only 9.5% of the total cargo was transported, Brazil 6.2%, Latin America nearly 2%, and Eastern Europe only 1%.

The bulk of trade between the EU and the Asia-Pacific region was in China. In 2016, it amounted to about \$ 538 billion, having increased by 3.5% over the previous year.

Traditionally, the main shipping route between Europe and China was the South Sea Route. Over 85% of all foreign trade cargo passed through it (Kozlov, 2017).

Over 9% of cargoes were transported by land through the Balkans, and slightly more than 6% through Belarus - Ukraine - Russia - Kazakhstan.

The largest growth in traffic carried on international multimodal transport corridor

'TRACECA' (Figure 1). The growth of traffic on this land transportation route through Central Asia, Turkey, and the Balkans is determined by the growing interest of business and transport operators in the UNECE project 'Trans-Eurasian transport links'.



Figure 1 - Routes of the main trade areas between the EU and China in 2016.

Source: Kozlov V.V. (2017)

Long periods of transportation of expensive cargo by sea cause the need to redistribute cargo flows from sea to land transport and, first of all, to rail. Long-term transportation of valuable cargoes by sea transport necessitate redistribution of cargo flows from the sea to land transport and, above all, to railway transport. To this end, the UNECE has adopted a number of directives to transfer freight from road to rail. According to these documents, it is planned to switch a third of long-distance road transport to rail transport by 2030, and to reduce by 50% the main road transport of goods transported over a distance of more than 300 km and switch them to rail and water transport by 2050.

This concept is being successfully implemented in practice. So, beginning in 2014, there is a clear tendency to reorient the export of EU countries from road transport to rail and water transport. The transportation of goods by sea transport is growing at a faster rate, as evidenced by the data in Table 2.

Table 2 - The share of export goods of the EU by different modes of transport

Mode of transport	Distribution of cargo transportation by mode of transport, %		
	2014	2015	2016
Automotive	1.5	1.3	1.2
Railway	19.7	20.4	21.4
Water	56.1	58.8	60.2
Other	22.7	19.5	17.2

Source: Kozlov B.B.(2017)

This is because manufacturers and logistics operators of the EU prefer to use cheaper and more environmentally friendly modes of transport to increase the competitiveness of European products in world markets by reducing the transportation of goods by road. Such a trend will take place over several decades in accordance with the concept of the White Paper.

According to Eurostat data the total volume of transported EU goods by all modes of transport, except for pipeline, amounted to about 8.7 million TEU in 2016. At the same time, the volume of transport within the EU amounted to 56% of the total volume of cargo transported.

Estimating the volume of transport within the EU, it should be noted that in 2016 the largest volumes of traffic were carried to Italy. The rest of the corridors were much lower.

3 TRANSPORTATION OF GOODS WITHIN THE EUROPEAN UNION

Experts from the analytical agency KombiConsult (Germany) found that goods inside the EU were

transported among almost 100 transport corridors, with 30 of them accounting for almost 56% of the total volume of cargo transportation and 73% of cargo turnover (Publication of the EU Analysis Committee on EU Combined Transport by the EU KombiConsult analytical agency. No. FV355 / 2012 / MOVE / D1 / ETU / SI2.659386. Electronic resource). The most intensive transport corridor in the EU in 2016 was the Germany-Italy corridor through Austria, which accounted for 14% of the total TEU or 18% of tonnage transported. The most important transport corridors are the corridors Germany – Italy, and Belgium – Italy through Switzerland, as well as the Trans-Balkan routes (Figure 2).

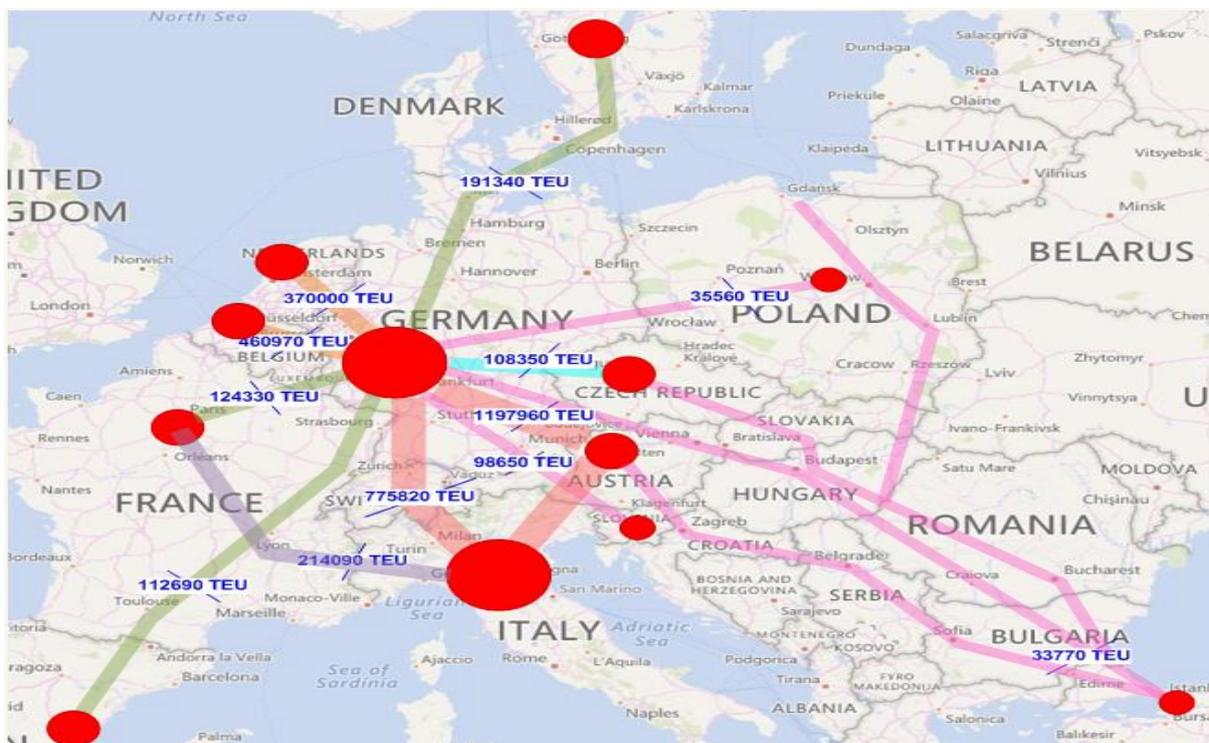


Figure 2 - Volume of goods transported by road and rail transport within the EU by main transport corridors in 2016.

Source: Kozlov B.B.(2017)

Table 3 - Distribution of cargo flows through the EU transport corridors in 2014-2016

Directions of cargo flows	The volume of transport, in thousand tons			Freight turnover, billion t-km		
	2014	2015	2016	2014	2015	2016
Transport corridors of the EU	450361	450889	451418	29.1	29.6	30.1
Domestic transportations	87335	86772	86209	26.7	25.9	25.5
Other corridors	896	9343	11676	10.6	11.6	12.2
Total	538592	547004	549303	66.4	67.1	67.8

The distribution of freight flows among the EU transport corridors in 2014-2016 is shown in Table 3.

These trends indicate an increase in traffic volumes by transport corridors on average by 1.5-2% per year. This is primarily due to the EU policy of the European program 'Connecting Europe Facility' (CEF) on investment in transport infrastructure projects: HORIZONT 2020, TEN-T, MARCO POLO.

4 INVESTIGATION OF CARGO TRANSPORTATION BETWEEN THE EU, RUSSIAN FEDERATION, AND KAZAKHSTAN

The main economic partner of the EU in 2016, as before, was the Russian Federation, despite the decline in foreign trade. So, according to Eurostat in 2016, exports of goods from the EU to Russia fell to 72.5 billion euros. The fall compared to 2015 was more than 2%. Import to the EU from Russia also fell to 116.5 billion euros - a drop of 16%. It should be noted that in 2015, the decrease in exports from the EU to Russia amounted to 29% compared with 2014, and from Russia to the EU - 26%. The figures indicate that the pace of the fall of trade between the EU and Russia is slowing down. In 2016, they amounted to an average of 0.2% per month. Nevertheless, there is the growth of trade between individual countries, such as Portugal (almost 49%), Bulgaria (7%), France (15%), Cyprus (14%).

In general, the volume of transportation of goods by road between the EU and Russia in 2016 in both directions amounted to more than 19.3 million tons.

International cargo transportation by rail between the EU and Russia in 2016 amounted to 821 million tons from the EU to Russia and 27 billion tons from Russia to the EU. The significant excess of Russian exports over imports is due to the large volume of hydrocarbons supplied to the EU, ore, and coal, and from Europe - mainly goods of industrial and agricultural production. In the past year, there has been a drop in the transport of goods by rail between the EU and Russia by more than 20%. At the same time, the greatest reduction in cargo flows was from France, Finland, Lithuania, Latvia, which, traditionally carried out

the transportation of transit goods through the Republic of Belarus. The study of trends in road transport of goods between the EU and Kazakhstan showed that in 2016 the total volume of traffic decreased by more than 3%, Kazakhstan reduced import of goods from such European countries as Lithuania, Germany, Spain, Czech Republic, Slovakia, and Denmark. At the same time, the volume of traffic from Kazakhstan significantly increased to Latvia, Slovenia and Luxembourg. When importing to the EU from Kazakhstan, the main partners were countries such as Spain, Poland, and Italy. The volume of imports from Kazakhstan to the Scandinavian countries has significantly increased, especially to Sweden and Norway. The total cargo flow between the EU and Kazakhstan through the Republic of Belarus in transit in 2016 was about 650 thousand tons. At the same time, 507 thousand tons of goods were delivered from the EU to Kazakhstan and 142 thousand tons from Kazakhstan to the EU.

5 DYNAMICS OF FREIGHT TRAFFIC THROUGH THE REPUBLIC OF BELARUS

The location of the Republic of Belarus in the center of the European continent allows to become a link between the countries of Europe and Asia and ensure unimpeded movement of transit freight traffic along the main transport corridors passing through Belarus. In the pre-crisis period, quite stable transit cargo flows were formed across the territory of the Republic of Belarus. However, after 2008, during the two crisis years, there was a decline in the volume of transit freight by road and rail. From 2011 to 2014, the volumes of transit traffic fluctuated in insignificant limits. The situation has changed significantly with the country's entry into a protracted crisis period. The dynamics of freight flows from/to the countries of the European Union was reflected on the turnover of goods and the volume of transport of goods by road and rail across the territory of the Republic of Belarus.

Despite the positive dynamics of cargo flows within the EU, the transport complex of Belarus in 2016 reduced the volume indicators of its work as in previous years. According to the National Statistical Committee of the Republic of Belarus,

in 2016 the volume of cargo transportation by all types of transport decreased by 3.8% compared to 2015.

The decrease in traffic volumes occurred on land and water transport, at the same time there was the growth of 146.0% on air transport (table 4).

The data in Table 4 show that in 2016 the rate of decrease in the volumes of freight transportations by rail and road transport slowed down considerably. As for freight turnover, it increased in relation to 2015 by all modes of transport. The growth of cargo turnover was due to the development of non-traditional remote markets, such as Morocco, Georgia, Iran, and Scandinavian countries.

It should be noted that the volume of cargo transportation on imports between the EU and the

Republic of Belarus to the EU decreased by 12.9% compared to 2015, while exports from the EU increased by 22.2%. The positive balance was 9.3%.

The study of the volume of transit through the Republic of Belarus in 2016 showed that more than 32 million tons of transit cargo were transported by rail or 84% by 2015. The total volume of transit cargo transported in comparison with 2011 decreased by more than 36%. The main transit cargo through Belarus in 2016 was Russian exports - more than 88%. In this case, the volume of transit cargo shipments towards Latvia decreased by 27% compared to 2015, Lithuania by 28%, and Poland and EU countries - increased by 15%. However, this growth was not enough to compensate for the decrease in the volume of cargo transportation to Latvia and Lithuania.

Table 4 - Transportation of goods in the Republic of Belarus

Types of transport	2014	2016	2016 in % by 2015	2015 in % by 2014
Transportation of goods, million tons				
All types of transport, including	467.5	430.4	96.2	95.7
Rail	141.4	126.8	96.5	92.9
Automotive	191.7	175.3	97.4	94.0
Water	3.8	2.1	72.4	78.9
Air	0.04	0.06	146.0	100.0
Freight turnover, million t-km				
All types of transport, including	131402	125263	99.4	95.9
Rail	44997	41107	100.8	90.6
Automotive	26587	24683	100.6	92.2
Water	49	21	100.0	42.8
Air	65	108	140.2	118.5

Source: Belarus in figures (2017)

According to the data of the State Customs Committee of the Republic of Belarus in 2016, foreign carriers implemented almost 745,000 transit automobile trips through the territory of Belarus, which is slightly less than in 2015. The largest number of transit trips was performed by carriers of the Russian Federation -56.3%, Poland - 20.8%, Lithuania - 9.1% and Ukraine - 2.7%, which is more than 91% of all trips.

In 2016 foreign carriers transported 11.39 million tons of cargo through Belarus via road, while Belarusian carriers - only 1.84 million tons. However, the share of Belarusian carriers in the total volume of transit traffic through the territory of the Republic Belarus increased from 12.9% in 2015 to 13.9% in 2016 (Figure 3).



Figure 3 - The volume of transit road transport of goods through the territory of the Republic of Belarus in 2010 - 2016. Source: Belarus in figures (2017)

According to the statistical data of 2016, the income of Belarussian carriers from transit traffic increased by 4.0% compared to 2015. At the same time, the average profitability of one transit trip in 2016 was about 2.8 thousand US dollars, which is the lowest indicator in 2011 - 2016 (Figure 4).

The largest part of the transit road transport of goods passing through Belarus in 2016 traditionally goes to/from the Russian Federation -

more than 90%, while to/ from other areas is about 10%. Basically, that is the cargo that follows between Ukraine and the Baltic countries. The volume of transit to and from the Russian Federation bypassing the Republic of Belarus in 2016 is 8 times less than through the territory of the Republic of Belarus, and through the territory of Ukraine - 3.3 times less than through the territory of the Republic of Belarus.



Figure 4 - Average profitability of one transit trip of Belarussian carriers in 2011 - 2016. Source: Molokovitch & Luksha (2017)

In 2016 the main truck traffic passed through the Belarussian-Polish and Belarussian-Lithuanian sections of the state border.

The World Bank's Doing Business 2017 research showed that in 2016, with the import of goods to the Republic of Belarus by road through the Kozlovichi checkpoint, the average time for all

border formalities was 240 minutes (waiting time in the queue was not taken into account), while costs were 108 US dollars, and through the Kamenny Log checkpoint - 260 minutes and 145 US dollars, respectively. Compared to 2015, the average time for border formalities decreased by 1 hour, but costs increased by 28 US dollars. The increase in financial costs is mainly due to an

increase in the cost of issuing electronic preliminary information to customs authorities and prices for services at checkpoints.

The analysis of the freight flows in the Euro-Asian direction shows the huge unrealized potential of the land transport corridors. So, according to the UN Economic and Social Commission for Asia and the Pacific in 2016, 17.7 million TEU were transported from Asia to Europe, and only 10 million TEU were transported from Europe to Asia. Consequently, 7.7 million TEU are empty containers that return to the country of origin. In 2016, only 3,762 container trains were sent from China to the EU countries, a total tonnage equaled to 451 thousand TEU (9.6 million tonnes), and from Europe to China - 1004 container trains, or more than 120 thousand TEU (2, 6 million tons). The main nomenclature of goods: from Germany - machine building, machine tools and equipment, food products; from France - electrical appliances, steel products, agricultural products, and wines. At the same time, the Southern Sea Route through the Suez Canal is the dominant traffic, which will reach its maximum capacity by 2020.

Estimating the potentialities of railway routes, it should be noted that the main traffic flows are carried through the border point Dostyk-Alashankou (Eastern Kazakhstan-Western China). In 2016, the daily throughput of this border crossing point was 520-550 cars. According to the estimates of Kaztransservice JSC, the capacity of the Dostyk-Alashankou crossing point can reach 730 thousand TEU.

There are several options for the transit from China to the EU, passing through the northern Eurasian railway corridors, including the Republic of Belarus. At the same time, it should be taken into account that rail transportation can provide such a competitive advantage as a shorter time of delivery of cargo at relatively competitive tariffs. Thus, the delivery of one ton of cargo by sea from Germany (Essen) through the port of Hamburg to the port of Shanghai is an average of 108 US dollars and takes about 35 days. Container transportation of one ton by rail on the route Essen - Warsawa - Brest - Dostyk costs an average of 168 US dollars and takes 15 days. Comparative tariffs for sea and rail transport in the direction of the EU - China are given in Table 5.

Table 5 - Tariffs for sea and rail container transportations in the direction of the EU - China

Route Shanghai	US dollars per container			Time of delivery, days
	20', 33 m ³	40', 67 m ³	40', 76 m ³	
Shipping				
1	2	3	4	5
Hamburg - Shanghai	2300	2400	2550	35
Kotka- Shanghai	2950	3950	4100	39
Tallinn-Shanghai	2735	3900	4220	38
Riga - Shanghai	2450	3800	4000	38
Klaipeda-Shanghai	2420	3300	3700	35
Novorossiysk-Shanghai	2550	3000	3400	22
Chernomorsk-Shanghai	1500	2800	3000	20
St. Petersburg - Shanghai	2750	4350	5150	40
Railway transportation				
Essen - Brest - Dostyk	3585	6510	6510	15

The data show that sea freight is 50% cheaper than rail, but at the same time, sea transport has significantly longer delivery times. In addition, maritime transport has a number of competitive

advantages compared to rail transport in the delivery of goods between Europe and China, including transit through the Republic of Belarus:

- lower tariffs due to the fact that large international shipping companies, when transporting large vessels, may charge a lower fee for port operations and cargo transportation than railway operators, which reduces the cost of delivery for shippers;
 - a minimum of physical and non-physical barriers. Physical barriers are an amortization and shortage of wagons, containers, locomotives, and vehicles; inadequacy of infrastructure and technology to international standards; insufficiently developed communication networks; different track width. Non-physical barriers are long terms of customs procedures at border crossing points; selective inspections requiring the opening of transit containers; uncoordinated transit tariffs in different CIS countries, confiscation of goods and vehicles, non-harmonized legislation and others.
1. The corridor 'Europe - East Asia' (Austria / Hungary / Italy - Bulgaria - Turkey - Turkmenistan - Uzbekistan - East Kazakhstan).
 2. Corridor 'East Asia - the Mediterranean'. Road and rail routes from China through Kyrgyzstan, Uzbekistan and Turkmenistan, the Caspian Sea, the South Caucasus to the Black Sea, and then to Europe.
 3. Corridor 'Northern Europe - Middle East - South Asia'. Road and rail routes from the Baltic region towards the countries of the Persian Gulf, the Middle East, and India.

It is necessary to note several problems related to the operation of the Pan-European transport corridors, which may influence the growth of transit cargo flows through the Republic of Belarus: an insufficiently developed network of border checkpoints and infrastructure that does not meet modern requirements of digital technology, a difference in electrification systems, low speed of transportation by rail and road message paths, etc.

Despite the attractiveness of the transit transport infrastructure of the Republic of Belarus, there is a number of land transport corridors that are competitors of the 2nd Pan-European Transport Corridor passing through Belarus: (Figure 5).

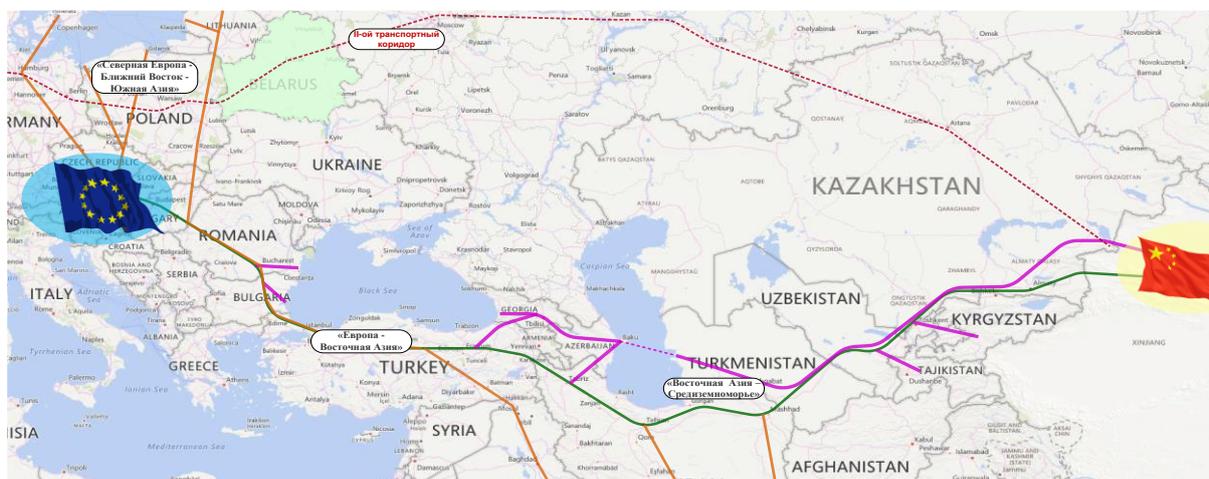


Figure 5 - Transport corridors between Europe and Asia that are competitive to the Republic of Belarus.

Source: Molokovitch & Luksha (2017)

In order to increase transit cargo flows through the Republic of Belarus it is necessary:

- to develop programs for the unification and adaptation of the transport system of the Republic of Belarus with the EU system that is aimed at creating favorable conditions for the growth of transit transport of goods and passengers;

- to create transnational companies with the participation of Belarusian transport and freight forwarding organizations in order to attract transit cargo traffic, including Belarusian transportation and logistics centers;
- to continue the development of the border infrastructure, including cooperation with neighboring countries in the construction and

- reconstruction of border and border infrastructure facilities;
- to develop an automated system for risk analysis at the stage of preliminary electronic information that integrates all types of control;
- to develop and to approve a through a tariff for container transportation with administrations and operators of foreign railways by accelerated container trains, with differentiation in directions to seaports;
- introduce non-contact, paperless and remote methods of detection, identification, and control when moving cargo and vehicles across the border.

6 CONCLUSION

The transport complex of the Republic of Belarus in 2016 reduced the volume of cargo transportation by all modes of transport by 3.2% compared to 2015.

The conducted studies showed that the Eurasian land transport corridors will not be able to compete in volume and cost with sea routes when delivering cargo to/from China and other countries of the Asia-Pacific region. Nevertheless, transcontinental transportation along the Eurasian land corridors may be attractive for the transportation of goods with high cost and relatively small weight and volume by rail. At the same time, operators should offer competitive tariffs and shortest delivery times.

The most optimal route from the economic point of view is the route between Europe and the Asian region using the 2nd Pan-European Transport Corridor through the Republic of Belarus with the exit through Russia and Kazakhstan to the western part of China. However, the intensive use of this route is hampered by risks associated with certain negative relations between Russia and China, as well as between the EU countries, which have an impact on the transit through the Republic of Belarus.

The development of cargo flows in the Euro-Asian direction through the Republic of Belarus is hampered by factors such as undeveloped infrastructure, long terms of customs procedures at border crossings; frequent random checks of goods and vehicles, which fines are not always fair in the degree of violation of law, sanctions applied, uncoordinated transit tariffs, long downtime at the border, etc.

The growth of cargo flows can be achieved through the creation of attractive transit conditions for foreign cargo owners, the expansion of cooperation within the framework of the initiative of the People's Republic of China "Economic belt of the Silk Road" by negotiating with the main shippers, railway administrations, forwarding and stevedoring companies for establishment the optimal tariffs through the provision of discounts and special tariffs for the carriage of certain groups of goods.

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