

July 30, 2018

14 Countries and Territory State Move Up in Top 100 Ranking on Gasoline Sulfur Limits

Stratas Advisors

This excerpt is from a report that is available to subscribers of Stratas Advisors' Global Fuel Specifications service.

Already a subscriber? Read the full report.

Stratas Advisors' annual Top 100 ranking again confirms the continued worldwide movement toward lower sulfur content in gasoline and cites several countries that have positioned themselves through policy initiatives to make advances in this area in the near future. However, aspects other than sulfur reduction — among them benzene, aromatics, olefins and volatility — are important in determining gasoline quality as well as influencing vehicle emissions.

The last ranking was carried out in May 2017 ([see Insight](#)). EU countries continue to dominate the Top 40, as they were required to implement 100% market penetration of sulfur-free (less than 10 ppm) fuels since January 2009. Germany, which led the way with full market penetration in 2003, continues to reign at No. 1.

14 countries and a territory state moved up or were newly added to the 2018 ranking, which were more than the 10 countries in the 2017 ranking. These countries and territory state include:

- Costa Rica
- Indonesia
- Malawi
- Mayotte
- Mongolia
- Mozambique
- Myanmar
- New Zealand
- Nigeria
- Peru
- Philippines
- Singapore
- Ukraine
- U.A.E.

Out of these 14 countries and territory state, six countries were newly added to the Top 100 ranking for the first time mostly due to the nationwide implementation or voluntary introduction of 10-150 ppm sulfur gasoline

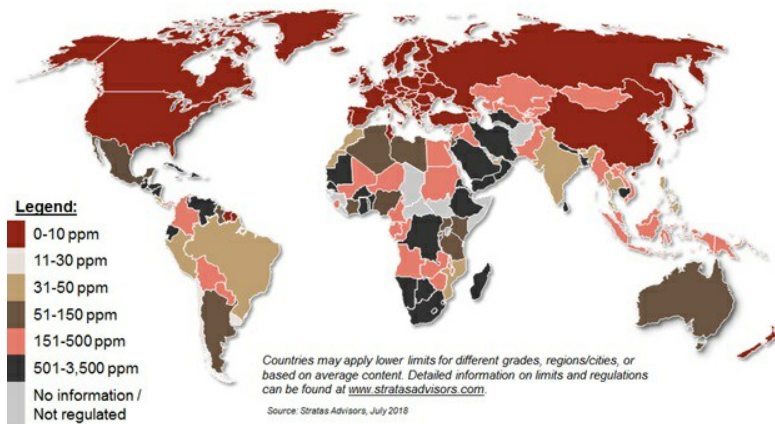
over 2016-2018. They include Costa Rica and Mozambique entering at 63rd place, Peru entering at 66th place, Nigeria entering at 82nd place, Myanmar entering at 93rd place, and Malawi entering at 96th place. Peru jumped the farthest with 87 places, followed by Mozambique with 78 places and Costa Rica with 66 places. Among the 14 countries and territory state, Mayotte and Singapore entered the top 50 by jumping 7 places and 14 places respectively to share the same rank at 45th place, due to the implementation of 10 ppm since January 2017 and July 2017 respectively.

As a result of continued introduction of 50 ppm and below, six countries including Cameroon, Niger, Papua New Guinea, Sierra Leone, Trinidad & Tobago and Mali dropped out of the 2018 ranking. It is also worthwhile to note that even with a new annual average sulfur limit of 10 ppm implemented since Jan. 1, 2017, Canada and the U.S. dropped in their rankings. Many of the other countries that dropped in the rankings including top gasoline markets such as Brazil did not alter their gasoline specifications but were simply passed by others that implemented stricter sulfur limits. In the 2018 ranking, Bolivia ranks at 100th place with a national sulfur limit of 500 ppm, which remained the same as from the 2017 ranking.

Maximum Gasoline Sulfur Limits (2018)

Maximum Sulfur Limits in Gasoline, 2018

Ukraine required 10 ppm since January 2018



Source: Stratas Advisors, July 2018

2018 Top 100 Gasoline Sulfur Ranking

Rank	Country/Region	Δ
1	Germany	+0
2	Japan	+0
3	Austria	+0
	Denmark	+0
	Estonia	+0
	Finland	+0
	Hungary	+0
	Sweden	+0
	9	Albania
Belgium		+0
Bulgaria		+0
Cyprus		+0

	Czech Republic	+0
	France	+0
	Greece	+0
	Iceland	+0
	Ireland	+0
	Israel	+0
	Italy	+0
	Latvia	+0
	Liechtenstein	+0
	Lithuania	+0
	Luxembourg	+0
	Malta	+0
	Netherlands	+0
	Norway	+0
	Poland	+0
	Portugal	+0
	Romania	+0
	Slovakia	+0
	Slovenia	+0
	South Korea	+0
	Spain	+0
	Switzerland	+0
	United Kingdom	+0
36	Turkey	+0
	Macedonia	+0
38	Hong Kong	+0
39	Croatia	+0
	Montenegro	+0
41	Taiwan	+0
42	Serbia	+0
43	Belarus	+0
	Russia	+0
45	Armenia	+0
	China	+0
	Georgia	+0
	Macau	+0
	Mayotte	+7
	Singapore	+14
51	Ukraine	+2
	New Zealand	+4
53	Suriname	-4
54	Chile	-4
55	Uruguay	-4
56	Philippines	+5
	Bosnia & Herzegovina	-3
58	United Arab Emirates	+9
59	Morocco	-3
	New Caledonia	-3
61	Thailand	-3
#	Iran, Select Cities	
62	Brazil	-2

63	India	-1
	Costa Rica	+66
	Mozambique	+78
66	Peru	+87
67	Bhutan*	-4
68	United States	-4
69	Canada	-4
70	Mexico	-4
71	Iraq*	-3
72	Algeria*	-3
73	Australia	-3
74	Argentina	-3
75	Libya*	-3
76	Uganda	-3
	Rwanda	-3
	Jordan	-3
	Tanzania	-3
80	Côte D'Ivoire	-3
	Kenya	-3
82	Nigeria	+45
83	Seychelles	-4
84	Gabon	-4
85	Qatar	-4
86	Paraguay	-4
87	Colombia	-4
88	Sudan	-4
89	Moldova	-4
	Kuwait	-4
91	Mongolia	+5
92	Azerbaijan	-5
93	Myanmar	+46
94	Indonesia	+2
95	Malaysia	-7
96	Malawi	+13
97	Vietnam	-8
98	Congo	-8
99	Egypt	-8
100	Bolivia	-8

Source: *Stratas Advisors, July 2018*

Not a subscriber? [Create an Account.](#)