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13 Countries Move Up in Top 100 Ranking on Diesel Sulfur Limits

Stratas Advisors

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Stratas Advisors' annual Top 100 ranking again confirms the continued worldwide movement toward lower sulfur content in diesel and cites a number of countries that have positioned themselves through policy initiatives to make advances in this area in the near future. However, it is worthwhile to note that aspects other than sulfur reduction — among them cetane, lubricity, polyaromatics, density and cold flow — are important in determining diesel quality.

The last ranking was carried out in February 2018 (see Insights, [Feb. 27, 2018](#)). EU countries, required to implement 100% market penetration of sulfur-free (less than 10 ppm) fuels since January 2009, continue to dominate the Top 40. Sweden, which led the way with full market penetration in 1990, continues to reign at No. 1.

13 countries moved up or were newly added to the 2019 ranking, compared to the 11 countries in the 2018 ranking. Led by Fiji which ranks at 58th place, the 13 countries include:

- Fiji
- Georgia
- Ghana
- India
- Mexico
- Moldova
- Mongolia
- Nigeria
- Panama
- Philippines
- Saudi Arabia
- South Africa
- Thailand

Many of the other countries that dropped in the ranking (e.g. Brazil) did not alter their diesel fuel specifications but were simply passed by others that implemented stricter sulfur limits or supplied lower sulfur

fuels ahead of legislation. Furthermore, six countries of Botswana, Kyrgyzstan, Namibia, Oman, Papua New Guinea and Swaziland dropped out of the 2019 ranking and were replaced by Fiji, Ghana, Moldova, Mongolia, Nigeria and Saudi Arabia as they enter the Top 100 for the first time. This is due to reductions in sulfur limits that have been implemented over the past year, or supply of lower sulfur diesel on the domestic market. Mongolia jumped the farthest by 54 places to rank at 92nd place, followed by Moldova which jumped 52 places to rank at 71st place with India, and Nigeria which jumped 49 places to share the 86th place with Ghana.

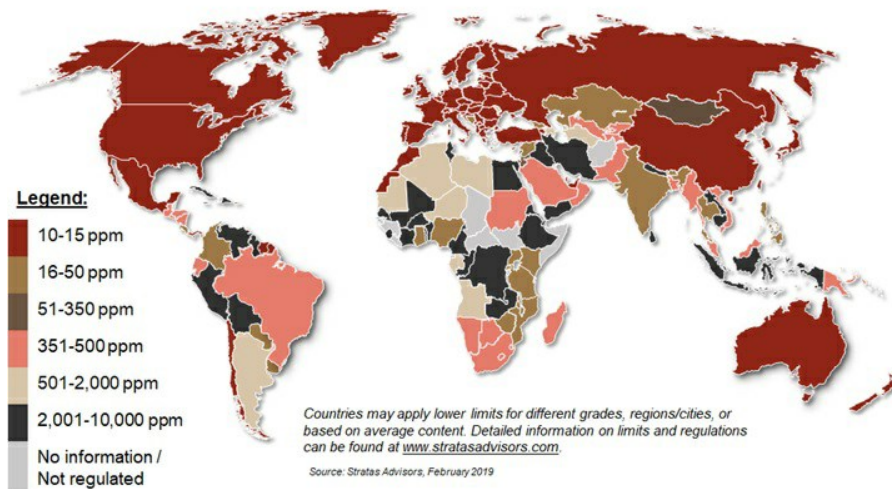
Myanmar sits at the last place (100th) with a maximum sulfur limit of 500 ppm which was in force as of December 2015, thus displacing other countries out of the Top 100 which set the same sulfur limit later than 2015. Even though cities and provinces are not officially ranked, it is worthwhile to note that select cities and provinces of Brazil, India, Iran and Peru required diesel fuel with lower sulfur of 50 ppm or below ahead of the rest of the country. For example, Brazil required 10 ppm sulfur diesel in select metropolitan regions since January 2013 while the rest of Brazil is currently required to meet a maximum sulfur limit of 500 ppm.

The map below shows current maximum on-road diesel sulfur limits worldwide, while the table below shows the Top 100 ranking.

Maximum On-Road Diesel Sulfur Limits (2019)

Maximum Sulfur Limits in On-Road Diesel, 2019

Mexico required 15 ppm since January 2019 except for Bajio-Centro region



Source: Stratas Advisors, February 2019

2019 Top 100 Diesel Sulfur Ranking

Rank	Country	Change
1	Sweden	+0
2	Germany	+0
3	Japan	+0
4	Finland	+0
5	Denmark	+0
	Hungary	+0

Rank	Country	Change
	Luxembourg	+0
	Netherlands	+0
9	Portugal	+0
10	Australia	-1
	Austria	-1
	Belgium	-1
	Bulgaria	-1
	Cyprus	-1
	Czech Republic	-1
	Estonia	-1
	France	-1
	Greece	-1
	Iceland	-1
	Ireland	-1
	Israel	-1
	Italy	-1
	Latvia	-1
	Liechtenstein	-1
	Lithuania	-1
	Malta	-1
	New Zealand	-1
	Norway	-1
	Poland	-1
	Romania	-1
	Slovakia	-1
	Slovenia	-1
	South Korea	-1
	Spain	-1
	Switzerland	-1
	United Kingdom	-1
	Turkey	-1
	Macedonia	+0
39	Hong Kong	+0
40	Armenia	+0
41	Albania	+0
	Croatia	+0
	Montenegro	+0
	Taiwan	+0
	Kosovo	+0
46	New Caledonia	+0
#	Brazil, Select Cities	
47	Singapore	+0
	Serbia	+0
49	United Arab Emirates	+0
50	Belarus	+0
	Suriname	+0
52	Russia	+0
	Morocco	+0
54	Macau	+0
55	China	+0

Rank	Country	Change
	Mayotte	+0
57	Ukraine	+0
#	India, Delhi	
58	Fiji	+43
59	Canada	-1
60	United States	-1
61	Guam	-1
62	Chile	-1
63	Panama*	+31
64	Mexico	+29
65	Bermuda*	-3
	Curacao*	-3
67	Thailand	+4
68	Paraguay	-4
69	Philippines	+9
70	Bosnia & Herzegovina	-5
71	India	+9
	Moldova	+52
73	Kazakhstan	-7
74	Georgia	+10
75	Colombia	-8
76	Syria*	-8
	French Polynesia	-8
#	Peru, Select Cities	
78	Costa Rica	-8
79	Mauritius	-8
#	Iran, Select Cities	
80	Uruguay	-7
81	Kenya	-7
	Rwanda	-7
	Tanzania	-7
	Uganda	-7
85	Malawi	-7
86	Nigeria	+49
	Ghana	+48
88	Mozambique	-8
89	Zimbabwe	-7
90	Bhutan*	-7
91	Lebanon	-6
92	Mongolia	+54
93	South Africa	+3
94	Vietnam	-8
95	Bahrain	-8
96	Malaysia	-8
97	Saudi Arabia	+7
98	Brazil	-9
	Tajikistan	-9
100	Myanmar	-9

Notes:

Not actually included in ranking; highlighted for significant achievement.

* Best ranking based on available information.

Source: *Stratas Advisors, February 2019*

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