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## 10 Countries 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.***

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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 July 2018 and this year's ranking was reviewed as of July 1, 2019. 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.

10 countries moved up or were newly added to the 2019 ranking, which were fewer than the 14 countries in the 2018 ranking (see Insights, [July 31, 2018](#)). These include:

- Benin
- Fiji
- Ghana
- India
- Jordan
- Kazakhstan
- Kyrgyzstan
- Niger
- Oman
- Tajikistan

Out of these 10 countries, eight were newly added to the Top 100 ranking for the first time mostly due to the mandatory implementation or voluntary introduction of 10-150 ppm sulfur gasoline over 2012-2019. They include Kazakhstan entering at 60th place, Ghana entering at 65th place, Fiji and Oman entering at 70th place, Niger entering at 81st place, Benin entering at 89th place, Kyrgyzstan entering at 98th place, and Tajikistan entering at 100th place. Benin jumped the farthest with 69 places, followed by Oman with 61 places and Ghana with 58 places.

As for the remaining two countries of India and Jordan which were already in the Top 100, India moved to 59th place by jumping four places, while Jordan jumped eight places to move to 68th place. Since none of the 10 countries reduced their national sulfur limit to 10 ppm, no new country entered the top 55 in this year's ranking.

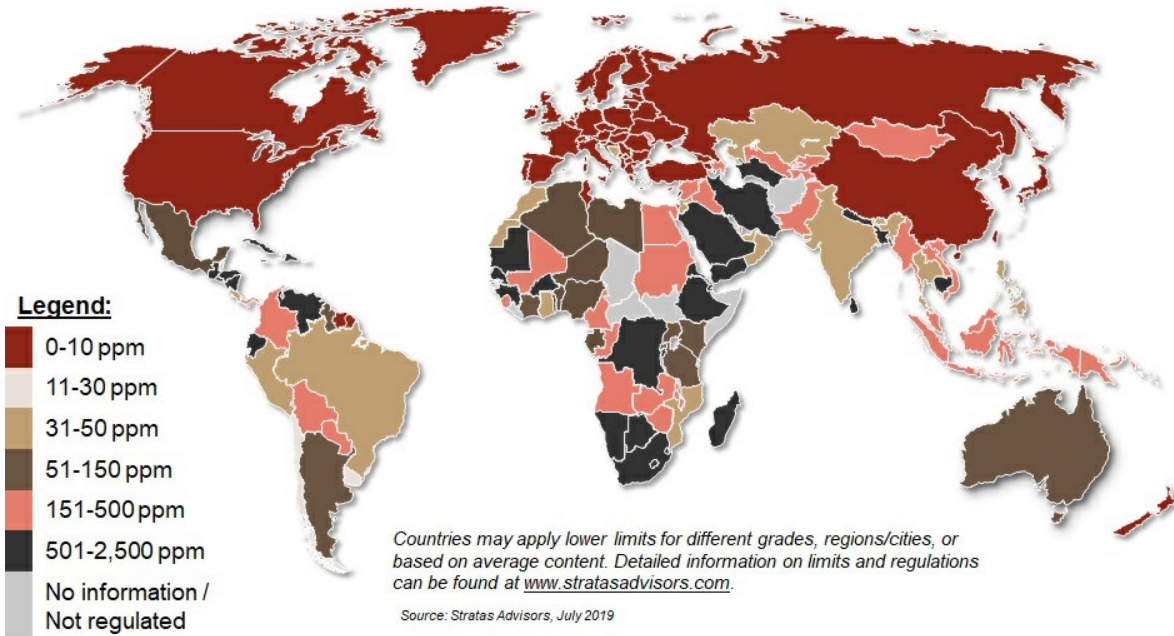
It is also worthwhile to note that three countries of Argentina, Gabon and Paraguay also tightened their gasoline sulfur specs or introduced specs for lower sulfur gasoline over 2017-2019, but did not move up the ranking possibly due to surpassing of other countries implementing sulfur limits lower than 150 ppm. Even though Argentina introduced additional specs for 10 ppm sulfur gasoline since January 2019, it dropped four places to rank at 78th place. As for Gabon, Stratas Advisors found that a new legislation was introduced for the first time since May 2018 requiring a maximum sulfur limit of 150 ppm for gasoline. However, Gabon moved down four places to rank at 88th place. Last but not least, Paraguay reduced its gasoline sulfur limit from 300 ppm to 200 ppm since July 2017, but again, it dropped by five places to rank at 91st place.

As a result of continued introduction of 50 ppm and below, eight countries including Myanmar, Indonesia, Malaysia, Malawi, Vietnam, Congo, Egypt and Bolivia dropped out of the 2019 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 and Mexico did not alter their gasoline specifications but were simply passed by others that implemented stricter sulfur limits. In the 2019 ranking, Tajikistan ranks at 100th place with a national sulfur limit of 500 ppm, which remained the same as from the 2018 ranking.

### **Maximum Gasoline Sulfur Limits (2019)**

# Maximum Sulfur Limits in Gasoline, 2019

Fiji implemented 50 ppm since January



Source: Stratas Advisors, July 2019

## 2019 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	+0
	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
<b>36</b>	Turkey	+0
	Macedonia	+0
<b>38</b>	Hong Kong	+0
<b>39</b>	Croatia	+0
<b>40</b>	Montenegro	-1
<b>41</b>	Taiwan	+0
<b>42</b>	Serbia	+0
<b>43</b>	Belarus	+0
	Russia	+0
<b>45</b>	Armenia	+0
	China	+0
	Georgia	+0
	Macau	+0
	Mayotte	+0
	Singapore	+0
<b>51</b>	Ukraine	+0
	New Zealand	+0
<b>53</b>	Suriname	+0
<b>#</b>	Iran, Select Cities	
<b>54</b>	Chile	+0
<b>55</b>	Uruguay	+0

<b>56</b>	Philippines	+0
	Bosnia & Herzegovina	+0
<b>58</b>	United Arab Emirates	+0
<b>59</b>	India	+4
<b>60</b>	Kazakhstan	+52
<b>61</b>	Morocco	-2
	New Caledonia	-2
<b>63</b>	Thailand	-2
<b>64</b>	Brazil	-2
<b>65</b>	Ghana	+58
	Costa Rica	-2
	Mozambique	-2
<b>68</b>	Peru	-2
	Jordan	+8
<b>70</b>	Fiji	+38
	Oman	+61
<b>72</b>	Bhutan*	-5
<b>73</b>	United States	-5
<b>74</b>	Canada	-5
<b>75</b>	Mexico	-5
<b>76</b>	Iraq	-5
<b>77</b>	Algeria*	-5
<b>78</b>	Argentina	-4
<b>79</b>	Australia	-6

<b>80</b>	Libya*	-5
<b>81</b>	Niger	+20
<b>82</b>	Uganda	-6
	Rwanda	-6
	Tanzania	-6
<b>85</b>	Côte D'Ivoire	-5
	Kenya	-5
<b>87</b>	Nigeria	-5
<b>88</b>	Gabon	-4
<b>89</b>	Benin	+69
<b>90</b>	Seychelles	-7
<b>91</b>	Paraguay	-5
<b>92</b>	Qatar	-7
<b>93</b>	Colombia	-6
<b>94</b>	Sudan	-6
<b>95</b>	Moldova	-6
	Kuwait	-6
<b>97</b>	Mongolia	-6
<b>98</b>	Kyrgyzstan	+14
	Azerbaijan	-6
<b>100</b>	Tajikistan	+17

Note:

# Not actually included in ranking; highlighted for significant achievement.

\* Best ranking based on available information.

Source: *Stratas Advisors, July 2019*

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