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Global Octane Market Continues to Be Dominated by Regular Gasoline Grades

Stratas Advisors

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

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Stratas Advisors is pleased to present current market octane share by country which includes historical octane market share dating as far back as 2010 in the full report.

Octane is regulated in various regions and countries using different approaches. Many countries establish minimum RON and MON levels for gasoline, whereas AKI is typically used in the Americas. Generally, it is required that refueling pumps indicate the octane level being sold as vehicle technologies require different octane and one or more grades can be found at the pump.

Notably across the world, current gasoline octane grades range widely from RON 80 to RON 110, or AKI 81 to 91 in the Americas. Several countries have two or more grades available on their markets, while a number of African countries have only one gasoline grade on their markets including Nigeria (RON 91), Libya (RON 95), etc. As of 2019, Indonesia has the highest number of gasoline grades on its market with a total of six grades of RON 88, 90, 92, 95, 98 and 100. In addition, four countries including Iraq, Peru, Philippines and Russia have as many as five gasoline grades on each of their markets. Furthermore, countries such as China, Egypt, Kazakhstan, Paraguay and Ukraine have four gasoline grades available on their markets.

Generally, it is observed across the world that regular grades have an octane rating ranging from RON 80 to RON 97 (or AKI 81 to 87), while premium grades have an octane rating ranging from RON 90 to RON 110 (or AKI 87 to 91). For example, the regular grade in Europe is RON 95 (see table below), while in the CIS, it ranges from RON 80 to 95. Regular grades often dominate the gasoline pool due to their cheaper price, and are thus more popular with consumers. Exceptions apply to seven countries, where their premium grade gasoline is found to be more popular than regular grade gasoline. The seven countries include Brunei, Dominican Republic, Nicaragua, Oman, Panama, Qatar and Thailand.

EU-28 Average Gasoline Market Share by RON

RON	91	95	96-97	≥98
EU-28 average	0.4%	78.8%	4.0%	7.9%

Source: *Stratas Advisors citing various petroleum associations and energy ministries, European Environment Agency, EU Fuel Quality Monitoring Reports, 2019*

Higher Octane Gasoline Grades

Stratas Advisors observes an increase in the availability of gasoline grades of RON 100 and above, not only in some of the mature markets, but also in emerging markets (refer to the full report for the list of countries). Some of the grades are offered as racing fuel at the pump or in containers and drums, while other grades are offered to provide a competitive edge over other retailers. With the exception of Japan, sales volumes of RON 100 and above are expected to be well below 1% of the premium gasoline grade sales volume in these markets.

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