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50 PPM Sulfur Diesel Dominates in 14 Countries with Two or More Diesel Market Grades

Stratas Advisors

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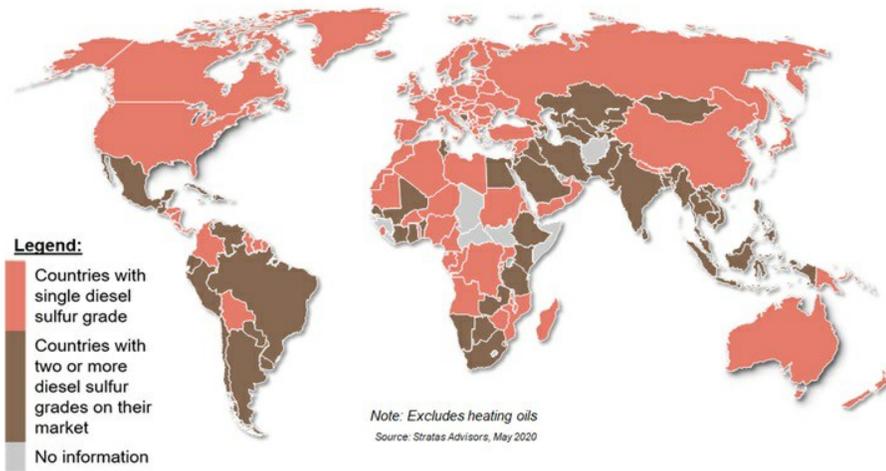
Stratas Advisors is pleased to present current diesel market share by sulfur in select countries including historical data dating as far back as 2010. Sulfur continues to be the key parameter of focus for diesel fuel, with sulfur limits ranging from 10 ppm to 10,000 ppm for on-road diesel grades, and from 10 ppm to 30,000 ppm for off-road diesel grades.

Stratas Advisors observes that across the globe, sulfur is harmonized in diesel fuel used for on-road and off-road applications in the regions of Europe, North America and most parts of the Middle East. In this year's report, Stratas Advisors assessed a total of 56 countries to have two or more diesel grades on their markets (including off-road grades), which was one more country than last year's report (see Insights, [July 19, 2019](#)). Among the emerging regions, Africa has the highest number of countries (17) with two or more diesel grades on their markets, followed by Asia Pacific (13), Latin America (11), Middle East (8) and CIS (7) (see map below). Lower sulfur diesel grades can often be found in countries with mandates to supply the grade in metropolitan cities to address air pollution issues (e.g. Iran, Mexico, Peru), or voluntarily supplied by oil companies in major cities or at select stations for use by more advanced diesel passenger cars and vehicles (e.g. Malaysia, Qatar, South Africa).

As for off-road diesel, Stratas Advisors observes that in seven countries in the regions of Africa, Asia Pacific and Latin America, the off-road grades typically contain much higher sulfur (between 1,800 ppm and 20,000 ppm) but account for a very small market share (<0.8%) depending on country. These countries include Bangladesh, Brazil, India, Indonesia, Kenya, Pakistan and Tanzania. On the other hand, in Ecuador where there are two off-road diesel grades with sulfur limits of 7,000 ppm and 3,000 ppm, the 7,000 ppm grade accounts for 29.6% of the diesel pool, while the 3,000 ppm grade accounts for 0.8%.

Countries with Single or Multiple Diesel Sulfur Market Grades

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Source : Stratas Advisors, May 2020

Share of Low Sulfur Diesel

In summary, Stratas Advisors observes that 50 ppm dominates the diesel pool in 14 countries with two or more diesel grades on their market, while 10 ppm dominates the diesel pool in only four countries with two or more diesel grades on their market:

Countries with 10 ppm or 50 ppm Sulfur Diesel as Majority Grades

Region	Countries with 10 ppm as Majority Grade	Countries with 50 ppm as Majority Grade
Africa	-	Benin, Kenya, Mauritius, Namibia, South Africa, Tanzania
Asia Pacific	India	Philippines, Thailand
Europe	Bosnia & Herzegovina	-
Latin America	-	Paraguay, Peru, Uruguay
Middle East	Lebanon	Iran
Russia & CIS	Georgia	Kazakhstan, Tajikistan

Source: Stratas Advisors, May 2020

The full report does not include analysis for sulfur limits in heating oils.

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