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15 Countries Move Up in Top 100 Ranking on Gasoline 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 gasoline and cites several countries that have positioned themselves through policy initiatives to make advances in this area in the near future (see table below for the full ranking). 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 2019 and this year's ranking was assessed as of June 1, 2020. 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.

15 countries moved up or were newly added to the 2020 ranking, which were more than the 10 countries in the 2019 ranking (see Insights, [July 25, 2019](#)). These include:

- Bhutan
- Burundi
- Cameroon
- Democratic Republic of Congo (D.R. Congo)
- Eritrea
- India
- Kenya
- Laos
- Malaysia
- Moldova
- Morocco
- Nepal
- Oman
- Rwanda

- Uganda

Out of these 15 countries, seven were newly added or entered the Top 100 ranking for the first time mostly due to the mandatory implementation or voluntary introduction of 10-300 ppm sulfur gasoline over 2015-2020. They include Nepal entering for the first time at 65th place, Malaysia entering at 66th place, Laos entering at 77th place, Burundi entering at 87th place, Eritrea entering at 91st place, as well as D.R. Congo and Cameroon both entering at 99th place. Nepal jumped the farthest with 93 places, followed by Eritrea with 50 places and Laos with 47 places.

As for the remaining eight countries which were previously in the Top 100, four of them reduced their national sulfur limit to 10 ppm or only supply 10 ppm nationwide, thus entering the top 60. They include Moldova, Oman, India and Bhutan, where Moldova and Oman now share the 53rd place by jumping 42 places and 17 places respectively. In addition, India moved up to 55th place by jumping 4 places, while Bhutan moved up 15 places to rank at 57th place. Furthermore, Morocco moved up by one place to rank at 60th place. The other three countries consist of East African Community (EAC) member countries Kenya, Rwanda and Uganda, where Kenya moved up 21 places to 64th place. Similarly, both Rwanda and Uganda moved up 8 places to share the 74th place.

As a result of continued introduction of 50 ppm and below, six countries including Azerbaijan, Jordan, Kuwait, Kyrgyzstan, Mongolia and Sudan dropped out of the 2020 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.

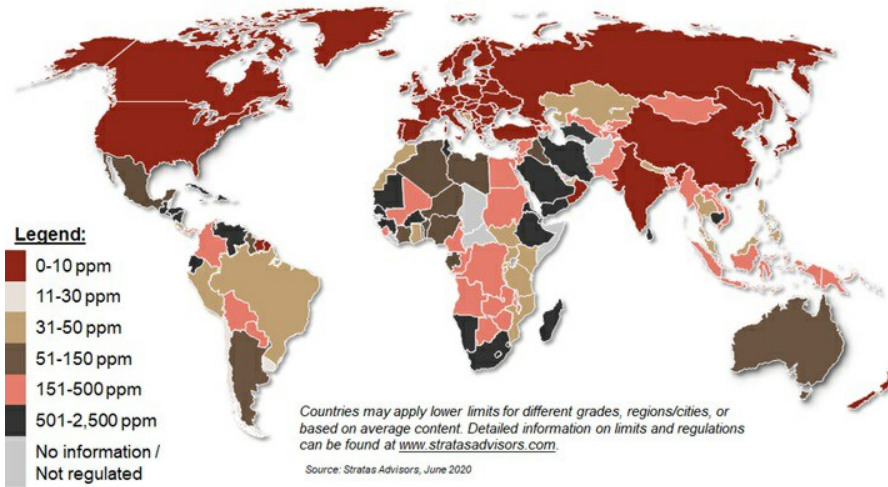
In the 2020 ranking, two countries of D.R. Congo and Cameroon co-rank at 99th place with a national sulfur limit of 300 ppm. This signifies that gasoline sulfur levels are dropping over the years, as the sulfur limit of the country ranked at 100th place in the 2019 ranking was 500 ppm. Kuwait, the earliest country setting its maximum sulfur limit at 500 ppm in 2005 with 10 ppm sulfur available in select areas, is now ranked at 102nd place.

Even though cities and provinces are not officially ranked, it is worthwhile to note that a number of cities require gasoline with lower sulfur of 50 ppm and below ahead of the rest of the country. For example, Iran supplied 10 ppm sulfur gasoline in Tehran and seven other major cities since March 2018, alongside 50 ppm, while the rest of Iran is currently required to meet a maximum sulfur limit of 1,000 ppm.

Maximum Gasoline Sulfur Limits (2020)

Maximum Sulfur Limits in Gasoline, 2020

India implemented 10 ppm since April



Source: Stratas Advisors, June 2020

2020 Top 100 Gasoline Sulfur Ranking

Rank	Country/ Territory	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
36	Turkey	+0
	Macedonia	+0
38	Hong Kong	+0
39	Croatia	+0
40	Montenegro	+0
41	Taiwan	+0
42	Serbia	+0
43	Belarus	+0

	Russia	+0
45	Armenia	+0
	China	+0
	Georgia	+0
	Macau	+0
	Mayotte	+0
	Singapore	+0
51	Ukraine	+0
	New Zealand	+0
53	Moldova	+42
	Oman	+17
55	India	+4
56	Suriname	-3
#	Iran, Select Cities	
57	Bhutan*	+15
58	Chile	-4
59	Uruguay	-4
60	Morocco	+1
61	Philippines	-5
62	United Arab Emirates	-4
63	Kazakhstan	-3
64	Kenya	+21
65	Nepal	+93
66	Malaysia	+38
67	New Caledonia	-6
68	Thailand	-5
69	Brazil	-5
70	Ghana	-5
	Costa Rica	-5

	Mozambique	-5
73	Peru	-5
74	Fiji	-4
	Rwanda	+8
	Uganda	+8
77	Laos*	+47
78	United States	-5
79	Canada	-5
80	Mexico	-5
81	Iraq	-5
82	Algeria*	-5
83	Bosnia & Herzegovina	-27
84	Argentina	-6
85	Australia	-6
86	Tanzania	-4
87	Burundi	NEW
88	Libya*	-8
89	Niger	-8
90	Côte D'Ivoire	-5
91	Eritrea	+50
92	Nigeria	-5
93	Gabon	-5
94	Benin	-5
95	Seychelles	-5
96	Paraguay	-5
97	Qatar	-5
98	Colombia	-5
99	D.R. Congo	NEW
	Cameroon	+11

Note:

Not actually included in ranking; highlighted for significant achievement.

* Best ranking based on available information.

Source: *Stratas Advisors, June 2020*

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