

November 14, 2022

## Sulfur Reduction for Gasoline and Diesel Continues in Central America & Caribbean

Stratas Advisors

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Within Central America and the Caribbean region, the countries continue to make progress in improving the quality of fuels utilized in their respective territories. Over the last several years, a number of countries have implemented improved fuel specifications for gasoline and diesel utilized in the region. Despite the lack of refining capabilities in the region, the countries have continued to work towards adopting ultra-low sulfur fuels for on-road and off-road use.

Despite being situated between the U.S. and South America where the fuel is of higher quality, Central America has made progress in improving the specifications for gasoline and diesel used in the region. In addition, the higher-octane grade gasoline (i.e. RON 95) continues to control market share between the grades utilized in Central America. Yet even with the availability of lower sulfur fuels from North and South America, the diesel fuel utilized in Central America and the Caribbean region continues to range in sulfur content from 10 ppm to 8,000 ppm (see maps below).

Within the region, the progress over the last several years includes the implementation of gasoline and diesel fuel specifications which include an ultra-low sulfur diesel grade (ULSD, max 15 ppm sulfur) in Belize. The country had initially begun the work in 2017, yet finalized the standards in mid-2021. In addition, the Central American Technical Regulation (RTCA) gasoline and diesel fuel specifications utilized by countries in the region were approved in early 2021. Moreover, from among the countries that use the RTCA specifications, Guatemala introduced E10 specifications in late 2021. As for vehicle emission standards in the region, Costa Rica and Jamaica plan to develop or implement tighter standards over the next five years.

### **Maximum Gasoline Sulfur Limits in the Central American Region**



Source: Stratas Advisors, November 2022

## Maximum Diesel Sulfur Limits in the Caribbean Region

### Maximum Sulfur Limits in Diesel, 2022

Use of high sulfur diesel continues in Caribbean region



Source: Stratas Advisors, November 2022

Updating Insights, [Aug. 21, 2020](#), the full report covers seven Central American and 22 Caribbean countries listed below:

<b>Central America</b>	<b>Caribbean</b>
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- |   |   |
|---|---|
| <ul style="list-style-type: none"><li>• Belize</li><li>• Costa Rica</li><li>• El Salvador</li><li>• Guatemala</li><li>• Honduras</li><li>• Nicaragua</li><li>• Panama</li></ul> | <ul style="list-style-type: none"><li>• Anguilla (U.K.)</li><li>• Antigua and Barbuda</li><li>• Aruba</li><li>• Bahamas</li><li>• Barbados</li><li>• Bermuda</li><li>• Cayman Islands</li><li>• Cuba</li><li>• Dominica</li><li>• Dominican Republic</li><li>• Granada</li><li>• Jamaica</li><li>• Martinique</li><li>• Montserrat</li><li>• Netherlands Antilles</li><li>• Puerto Rico</li><li>• St. Kitts and Nevis</li><li>• St. Lucia</li><li>• St. Vincent and the Grenadines</li><li>• Trinidad &amp; Tobago</li><li>• Turks and Caicos Islands</li><li>• U.S. Virgin Islands</li></ul> |
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