

MARKET BASELINE STUDY ON LOW SULPHUR FUELS

ON BEHALF OF THE ICCT AND UNEP

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**CLIMATE &
CLEAN AIR
COALITION**
TO REDUCE SHORT-LIVED
CLIMATE POLLUTANTS

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ACRONYMS

BBL/d	Barrels of oil per day
CCAC	Climate and Clean Air Coalition
GFEI	Global Fuel Economy Initiative
HDDI	Heavy Duty Diesel Initiative
HDV	Heavy duty vehicles
ICCT	International Council on Clean Transportation
LDV	Light duty vehicles
OECD	Organisation for Economic Co-operation and Development
ppm	Parts per million
UNEP	United Nations Environment Programme

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PURPOSE

Over the past couple of decades, there has been a trend towards lower sulphur automotive fuels and cleaner, more efficient vehicles and vehicle emission standards. However, there are still countries and entire regions that use high sulphur fuels, which negatively impact on public health (through fine particulate matter) and climate (black carbon emissions). In addition, high sulphur fuels prevent the introduction of cleaner, more efficient vehicles by limiting emission control technologies.

ICCT is part of the Climate and Clean Air Coalition (CCAC) Heavy Duty Diesel Initiative (HDDI). Other partners are UNEP, the US Government and the Canadian Government. As part of the HDDI, ICCT and UNEP are working together to prepare a global sulphur strategy to promote a global move to low sulphur fuels. This report will contribute to the development of this strategy. In addition to this market study ICCT and UNEP are also in the process of preparing a global refineries report and a set of country case studies – all three will be key pillars contributing to the development of the global sulphur strategy.

This market baseline study provides a global overview of auto fuel (both crude and refined) and vehicle markets in various sub-regions where higher sulphur fuels (in particular, diesel fuel) are still in use (fuels above 50 ppm). The narrative lays out insights from a global survey that mapped out the fuel quality in countries, the quantities of oil traded and produced, and the vehicle fleet in use (both new and used, imported and produced locally).

When combined with the findings of the parallel refinery investment study, it will inform the development of a global strategy for the reduction of sulphur levels in auto fuels and the use of cleaner, more efficient diesel technologies to lower particle matter emissions and black carbon worldwide.

The market baseline study is split into regions and sub-regions. Annex 1 lists the countries per region / sub-region that were surveyed. Tables with details of diesel and vehicle standards and markets per region are presented in Annex 2 (Africa), Annex 3 (Middle East), Annex 4 (Latin America), Annex 5 (Eastern Europe and the Caucasus) and Annex 6 (Asia). References are listed in Annex 7.

METHODOLOGY

The data acquisition aspect of this study used a variety of online sources, in addition to drawing on the expertise and experience of UNEP Transport Unit staff working within the regions on improving fuel quality and vehicle emission standards.

预览已结束，完整报告链接和二维码

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