



Fuel Economy State of the World 2014

The World is Shifting into Gear on Fuel Economy
EXECUTIVE SUMMARY





Executive Summary

Over the past two years it has become clear that the world is shifting into gear on fuel economy: more and more countries are acknowledging the need for strong policies, and more are investigating, developing and implementing those policies. Fuel economy trends are beginning to show real signs of progress. Yet there is still a long way to go to reach the GFEI 2030 target of a 50% reduction in new car fuel consumption (L/100km) compared to 2005 levels.

During 2012-2013:

- The US and Canada became the first countries to set fuel economy standards through 2025, and Mexico set its first standards.
- There were updated, tightened and extended light-duty fuel economy standards in the EU, China and Japan.
- Standards were developed though not yet implemented in India, while discussions on standards are underway in some Southeast Asian and Latin American countries.
- Mauritius developed and implemented what appears to be the first fuel economy/CO₂-based feebate system in the developing world.

The rate of fuel economy improvement in major countries around the world was faster between 2008 and 2011 than it was between 2005 and 2008, an encouraging sign. The detailed news on fuel economy trends is mixed:

- Average new light-duty-vehicle (LDV) fuel economy in the OECD improved by 2.7% per year between 2008 and 2011 while in non-OECD countries it improved by only 0.6% (based on an IEA sample of countries including most major markets). This caused average OECD fuel economy to surpass non-OECD possibly for the first time, with 2011 averages of 7.0 L/100km in OECD and 7.5 in non-OECD.
- Overall the global average of 7.2 L/100km represents a 0.8% annual improvement since 2005 slower than the pace needed to reach 4 L/100km by 2030. From the position in 2011, a 3% per year improvement will be needed to get there.

This report reviews the recent progress and remaining challenges. It highlights the new developments, trends, and examples of progress that the Global Fuel Economy Initiative has helped to bring about. It also reminds us that reaching a global reduction of 50% in new car fuel use by 2030 compared to 2005 levels will take a stronger push than the planet has set in place thus far. More policies in more countries will be needed, as will the extension and strengthening

of policies even in those countries that have already undertaken major initiatives and set strong policies.

This report also provides background on the GFEI, summarizes its progress and events during 2012-2013, and highlights important research findings coming from GFEI partners. Some of our key achievements and findings during the year, as presented in the following sections, include:

- Engagement with a wide range of governments around the world, particularly in developing countries.
- Reports that compare fuel economy in different countries, including analysing the underlying reasons for differences, relating both to market structure and technology uptake.
- Reports on the net costs and benefits of fuel economy improvement, in particular a new report showing that reaching the GFEI 2030 target could result in a net \$2 Trillion savings to consumers around the world.
- Coverage of issues ranging from managing 2nd hand car imports around the world to measuring in-use fuel economy, and interactions between fuel economy improvement and pollution emission reductions.

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Secretariat

Global Fuel Economy Initiative
60 Trafalgar Square
London WC2N 5DS
United Kingdom
+44 (0)207 930 3882 (t)
+44 (0)207 930 3883 (f)

Contact us

Email: info@globalfueleconomy.org
Web: globalfueleconomy.org
 twitter.com/GlobalFuelEcon
#GFEINetwork
 linkedin.in/I9ltFd2



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