A core part of GFEI’s work is to support countries to develop baselines and evidence from which fuel economy policies can be developed. This also helps countries to track progress and evaluate the impact of policy changes to promote fuel economy.

GFEI has supported the development of baseline analysis of vehicle fleets in 17 developing countries. Due to differences in vehicle registration systems and monitoring, there are considerable differences in the data available between countries. For example, the Côte D’Ivoire baseline analysis was based only on the 9 top selling cars, whereas in the Philippines the analysis was only carried out for the year 2013. Nevertheless, Figure 7 shows the range of different fuel economy performance in between countries, and gives an indication of relative performance and trends.

Similar to big, developed vehicle markets, the national average fuel economies of new light duty vehicles show large differences. These differences can generally be linked to:

- The share of used imported vehicles
- The absence or presence of light duty vehicle production capacity within the country
- The average price of fuels
- The level of taxation of light duty vehicles

Unlike the big, developed markets, average fuel economies of newly registered cars stagnated over the eight years or even worsened over time, e.g. in Georgia, Kenya and Uganda. While this is often linked to the trend to buy bigger cars, it clearly shows the potential of introducing effective fuel economy policies to reverse this trend over time.

The graph shows that countries like the US, the member states of the EU, Japan but also China, have put in place policies and see the efficiency of their fleets rapidly improving. These countries have also put in place targets (represented by dotted lines) that go beyond 2015. Many of the non-OECD countries see a flat line with little or no fuel economy improvement and no policies as well as long term targets in place. However, there are a few countries like Mauritius that show improvement after policies have been adopted. Many of the countries that have no policies in place show worsening average fuel economy. The graph also shows, that in some countries like Tunisia and Morocco, the average fuel consumption of vehicles is near the GFEI target of 4L/100km. This is mainly due to the fact that their vehicle fleet is mainly composed of second-hand vehicles coming from Europe, particularly France, which are already fuel efficient.