

Global Fuel Economy Trends

Earlier GFEI research showed that global fuel economy improved by an average of 1.7% per year between 2005 and 2008, far below the required 2.7% annual improvement rate to reach the GFEI target of halving new light duty vehicle fuel economy (in l/100km or gCO₂/km) by 2030 (GFEI, 2011).

New GFEI analysis highlights that the pace of improvement has slightly accelerated between 2008 and 2011, but at 1.8% annual improvement rate is still lagging behind the overall GFEI target (table 1).

Given the slower rate of improvement between 2005 and 2011, average fuel economy from 2012 to 2030 needs to improve by 3% per year. This is ambitious but appears achievable. However too many countries do not yet have standards. In particular, non-OECD countries have not been making sufficient progress towards better fuel economy over the 6-year period, and as non-OECD market growth is increasing much faster than OECD markets, most focus in the near future should be placed in helping non-OECD countries to develop and deploy more stringent fuel economy policies. OECD countries are on the right track but need to slightly accelerate the trend to meet the GFEI target in 2030, which will be more and more challenging as the target gets closer.

The technical potential to reach the GFEI target has been demonstrated, but policies are needed to ensure these technologies are widely adopted in the mass market.

Table 1 Fuel economy evolution compared to GFEI target

		2005	2008	2011	2030
OECD average	average fuel economy (Lge/100km)	8.1	7.6	7.0	
	annual improvement rate (% per year)	-2.2%		-2.7%	
		-2.4%			
Non-OECD average	average fuel economy (Lge/100km)	7.5	7.6	7.5	
	annual improvement rate (% per year)	0.4%		-0.6%	
		-0.1%			
Global average	average fuel economy (Lge/100km)	8.0	7.6	7.2	
	annual improvement rate (% per year)	-1.7%		-1.8%	
		-1.8%			
GFEI target	average fuel economy (Lge/100km)	8.0			4.0
	annual improvement rate (% per year)	-2.7%			
		2012 base year	→		-3.0%

As shown in Figure 1, the overall trend is encouraging, even though some countries are showing very limited progress over the 6-year period. The major non-OECD markets (Brazil, India, China) are working on fuel economy policies that should change this picture and provide results in the coming years. GFEI will pursue the tracking of average new vehicle fuel economy efforts.

Figure 1 Average new LDV fuel economy evolution by country, 2005 to 2011



Note: Due to market characteristics and data availability, Canada, USA and Australia include all light duty vehicles; see Annex I. Egypt data is no longer available after 2008. Canada and Korea are only available from 2010. Only the major EU markets are shown.

Tremendous progress has been made in recent years regarding the interest, development and deployment of fuel economy policies and related vehicle technologies. This trend nevertheless needs to be sustained and accelerated in the near future in order to reach the GFEI target of 4Lge/100km for the average new vehicle sold around the world in 2030.

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