



ASEAN Fuel Economy Roadmap

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Adoption of ASEAN Fuel Economy Roadmap



The 24th ASEAN Transport Ministers Meeting on 8-9 Nov 2018 has adopted the ASEAN Fuel Economy Roadmap for Transport Sector 2018-2025: With Focus on Light Duty Vehicles

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The ASEAN Fuel Economy Roadmap was produced by ASEAN with the support of GIZ, and funded by the German Federal Ministry for Economic Cooperation and Development

Highlights of ASEAN Fuel Economy Roadmap

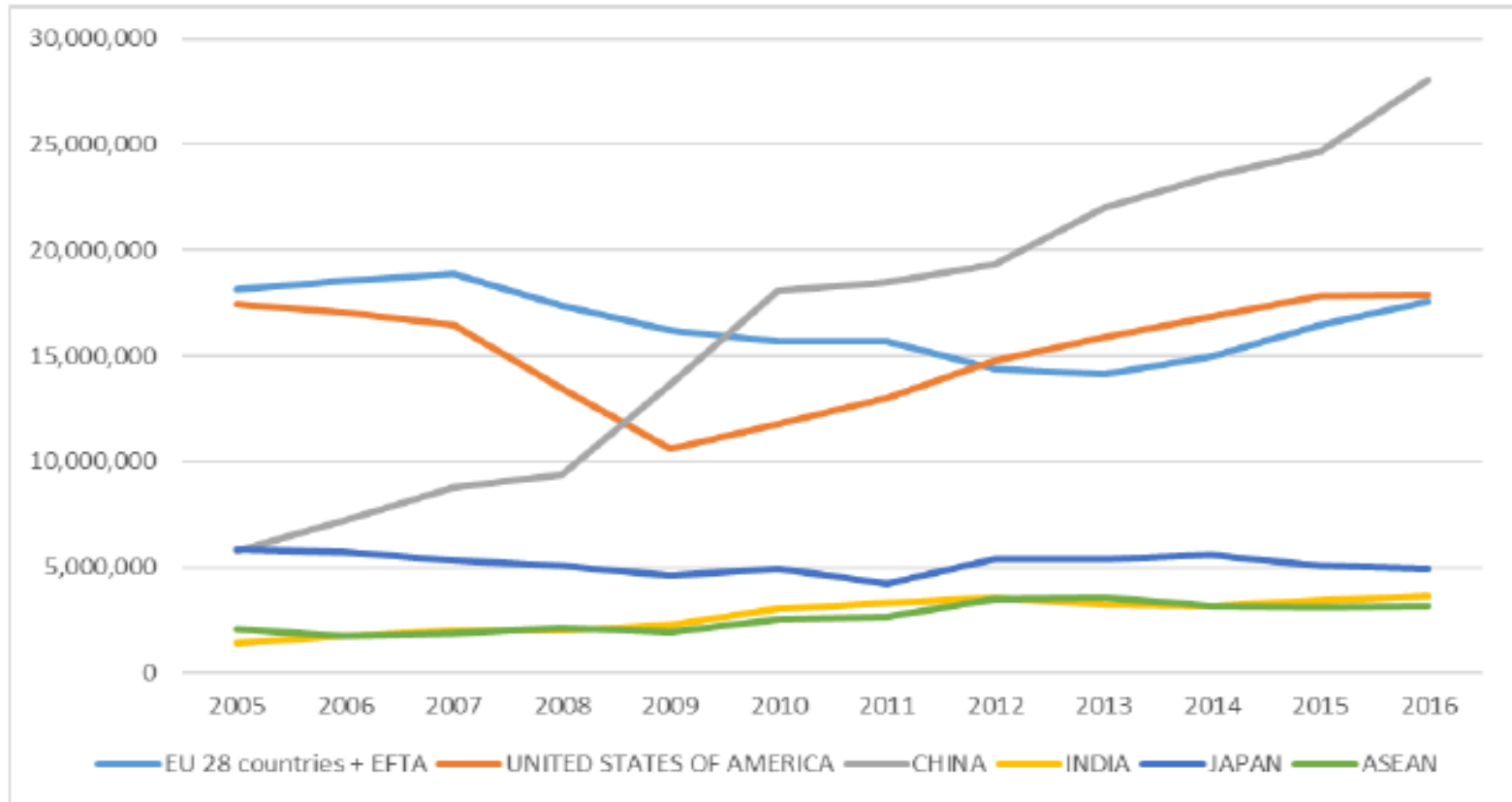
1. Current Status of Fuel Economy in ASEAN Region
2. Vision, Goals, and Recommended Actions of Roadmap



If ASEAN were a single country, where would it rank compared to other countries?

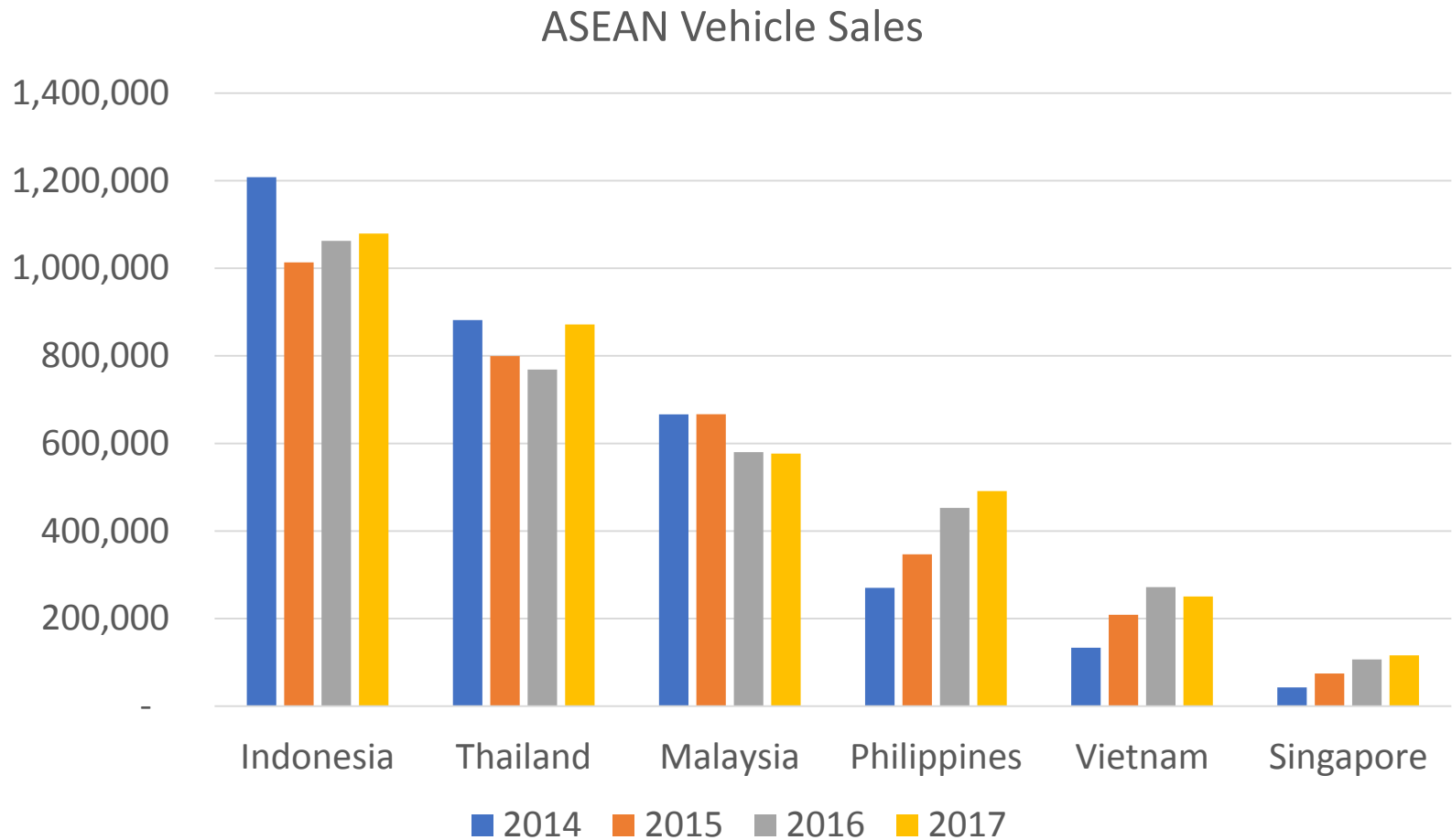
1	 Crude palm oil production	 Natural rubber production	 No. of cities in top 100 BPO locations worldwide	 Size of Muslim population	 Issuance of Sukuk (Islamic bonds)
2	 Value of foreign direct investment inflows	 Length of coastline	 Rice production	 No. of monthly Facebook users	 Size of Buddhist population
3	 Size of overall population	 Size of Christian population	 Mobile phone subscriptions	 No. of flights (both domestic and international)	 Foreign exchange reserves
	 No. of ports in the world's 100 biggest	 Sea-borne cargo volume	 Production of natural gas	 Production of coal	 Consumption of oil
	 Value of exports in 2018	 Annual gross national savings in 2018	 No. of households with HH income of US\$10,000 or more in 2018		
4	 Value of investment into fixed assets (like infrastructure)	 Value of exports in 2013	 Annual gross national savings	 Poultry production	 Local companies in the Forbes Global 2000
5	 Vehicle sales (annual sale of cars, trucks and buses)	 Consumption of natural gas	 Consumption of coal	 GDP in 2018	

Motorisation is Increasing Rapidly



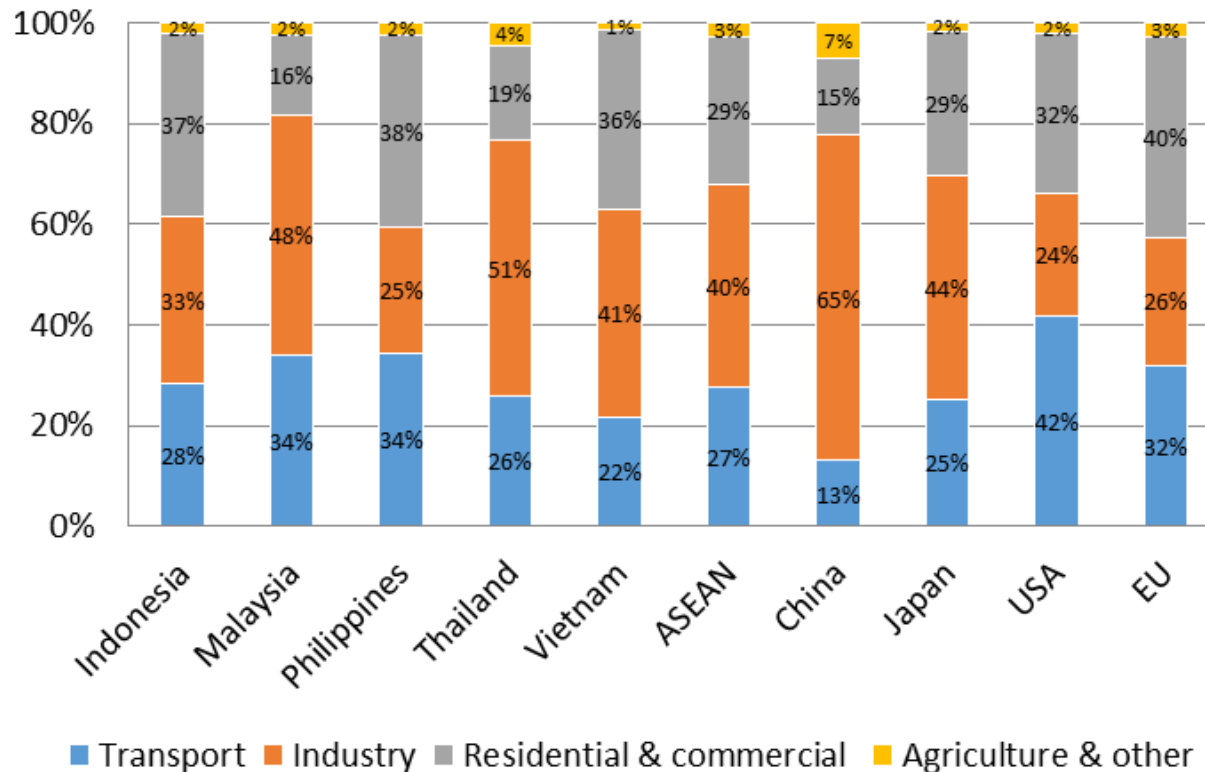
Source: EU ABC Automotive Position Paper 2017

Vehicle Sales in ASEAN Markets



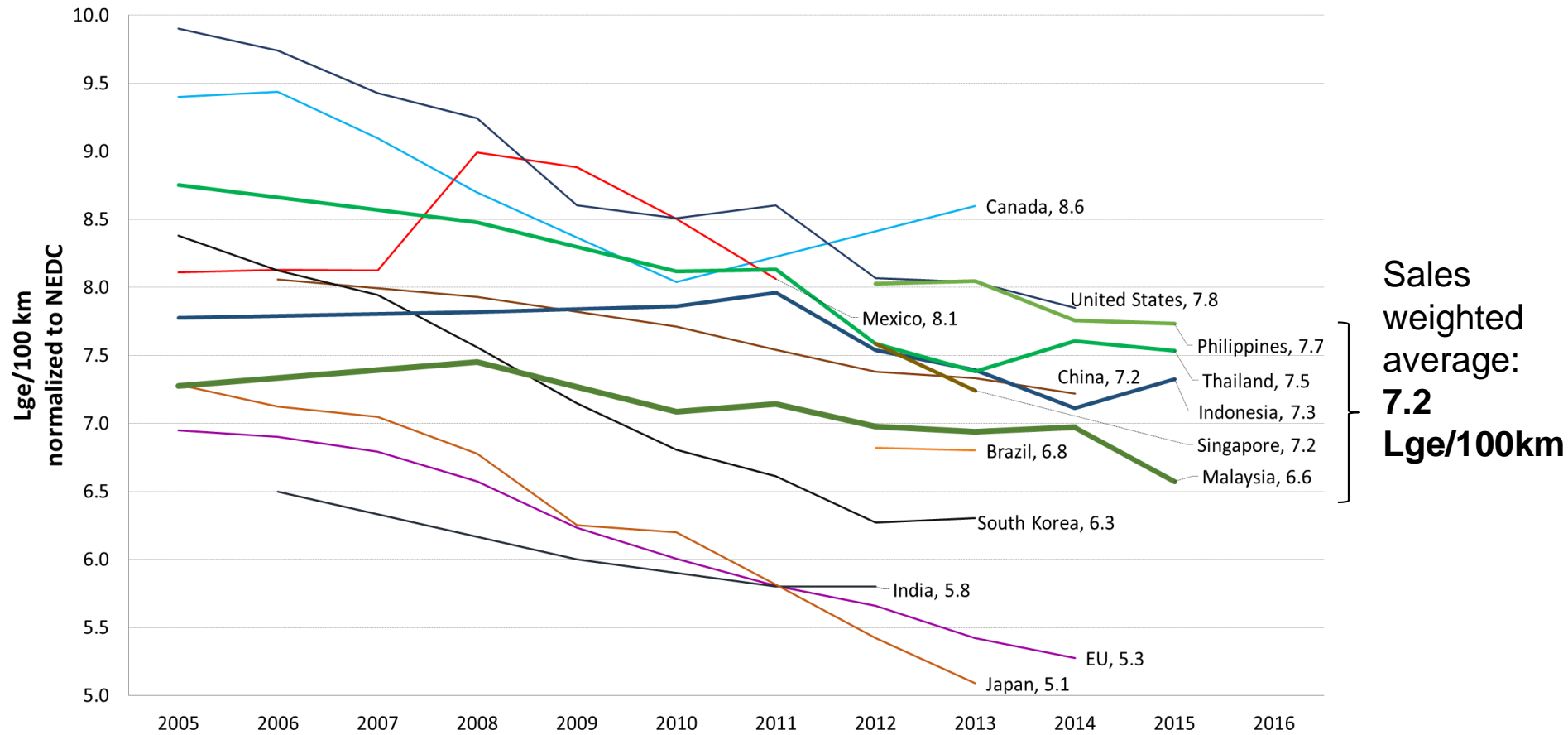
Transport Share of Energy Consumption

Energy consumption by sector (2012)



Transport is at least ¼ of energy consumption in ASEAN countries and other parts of the world

LDV Fuel Consumption Trends around the World



Source: GIZ 2018 based on GFEI 2015 data

Vehicle Statistics: ASEAN Region vs the World

30% less powerful

- 77 kW in ASEAN
- 112 kW for the world average

10% lower engine displacement

- 1.8 L in ASEAN
- almost 2.0 L for the world average

8% lighter

- 1,240 kg in ASEAN
- Almost 1,350 kg for the world average

5% smaller

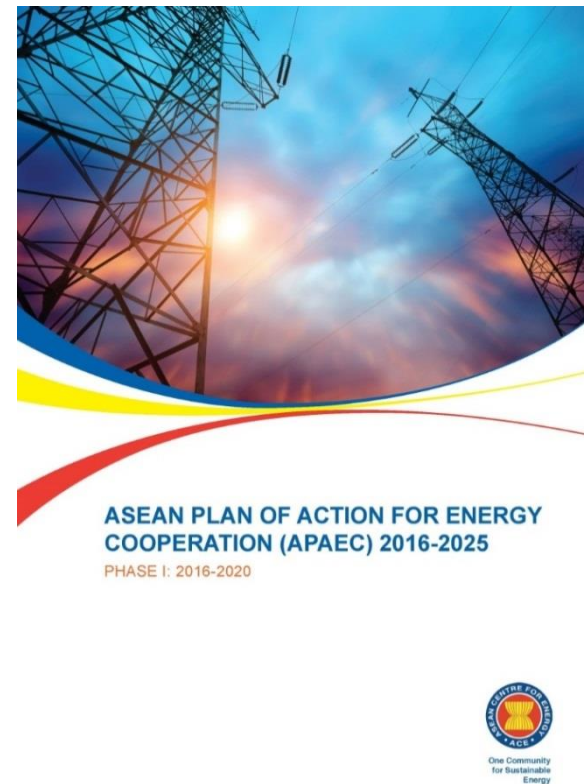
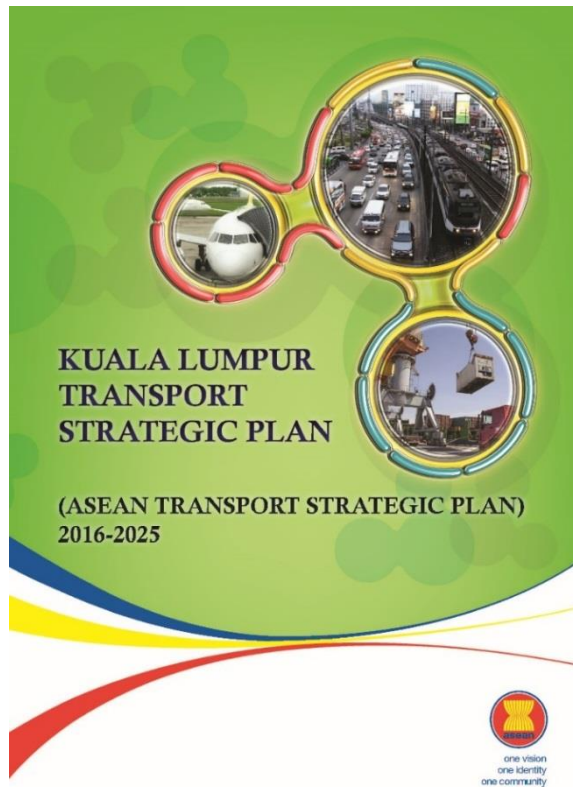
- 3.9 m² in ASEAN
- almost 4.1 m² for the world average

3% less fuel efficient

- 7.2 Lge/100km in ASEAN
- 7.0 Lge/100km for the world average

Source: ASEAN LDV FE Roadmap

Regional Strategies that include Action on FE



http://www.asean.org/storage/2016/01/11/publication/KUALA_LUMPUR_TRANSPORT_STRATEGIC_PLAN.pdf
<http://www.aseanenergy.org/wp-content/uploads/2015/12/HighRes-APAEC-online-version-final.pdf>

Fuel Economy in ASEAN's Transport Plan

Sustainable Transport Goal 1.3 *“Initiate and support to the development and implementation of fuel economy policies and standard as well as policies towards cleaner fuels and vehicles and vessels”*

Section	KLTP Milestones
ST-1.3.1	Establish a platform to discuss matters related to fuel economy for the transport sector
ST-1.3.2	Formulate a fuel economy roadmap for the transport sector in ASEAN including policy guidelines
ST-1.3.3	Support to the development and adoption of nationally appropriate policies for cleaner fuels and vehicles

ASEAN Fuel Economy Platform



FE Platform supports development of the FE roadmap through expert inputs, joint brainstorming, exchange of experiences and information

Reports of the 1st, 2nd and 3rd Forum at www.transportandclimatchange.org

Highlights from the FE Platform

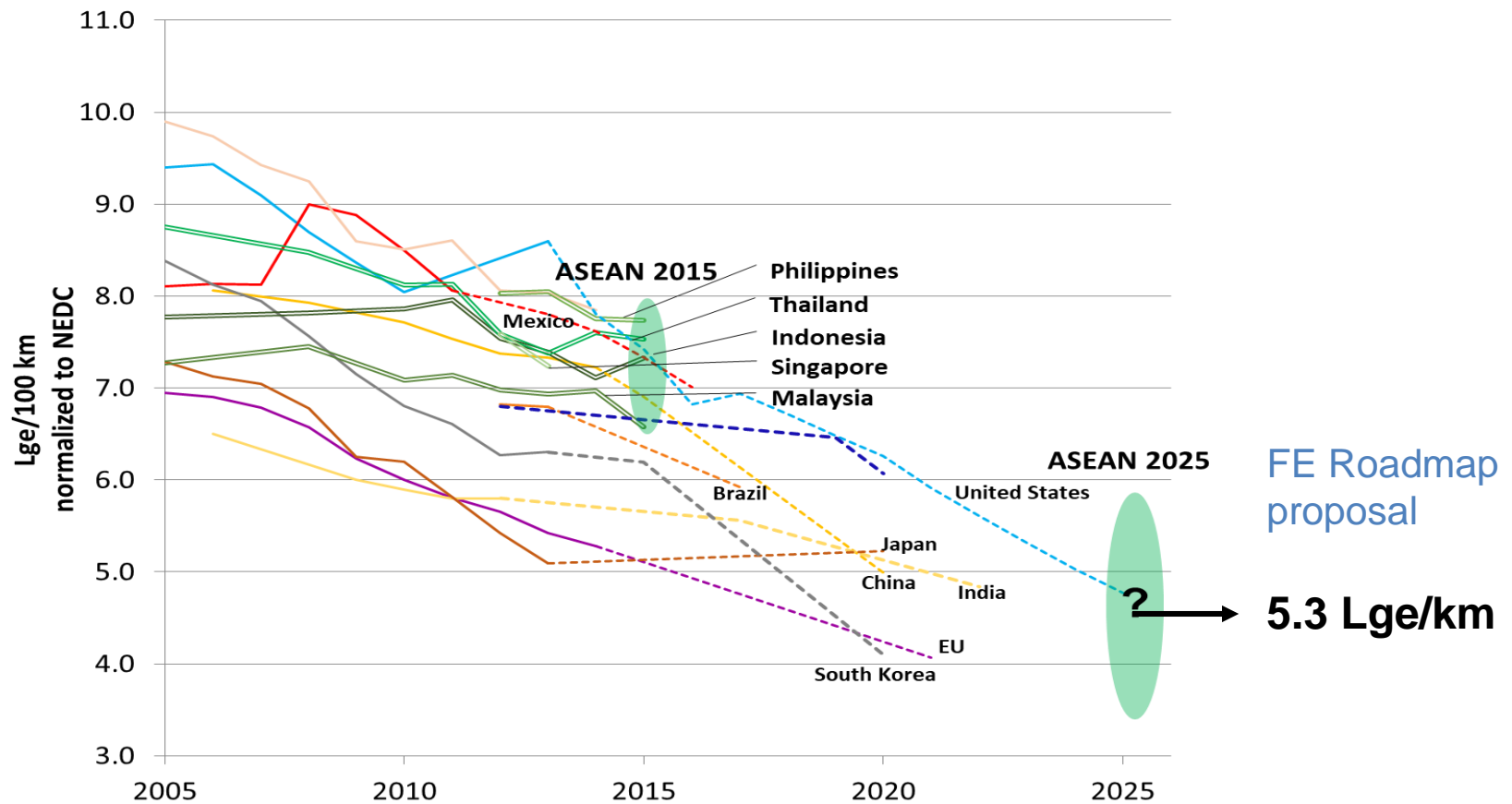
- Policies to improve FE of LDV have great potential to reduce fuel use, GHG, and fuel expenditures.
- FE policies need country-specific tailoring, but ideally build on common metrics and methodologies across the region.
- FE baseline data is an essential ingredient for any policy.
- Momentum to advance FE policies in the region continues, but there is diversity in the status and progress of these policies among AMS.
- A regional FE Roadmap is considered vital for accelerating progress in the development of policies and for facilitating a coherent approach among countries.

Roadmap Vision

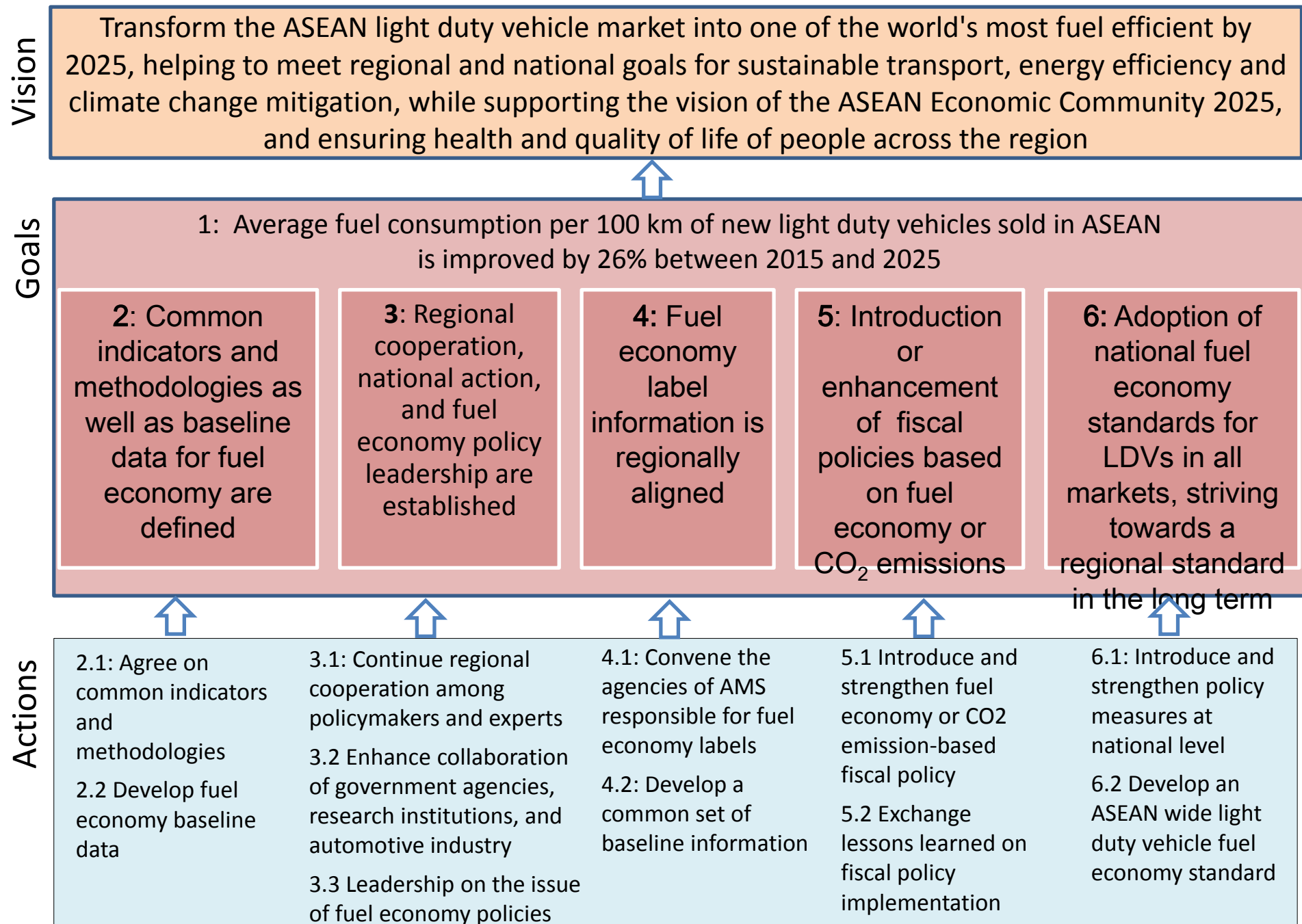
The vision of this roadmap is to
transform the ASEAN light duty vehicle market into one of the world's most fuel efficient by 2025,
helping to meet regional and national goals for sustainable transport, energy efficiency and climate change mitigation, while supporting the vision of the ASEAN Economic Community 2025,
and ensuring health and quality of life of people across the region.

Source: ASEAN LDV FE Roadmap

Aspirational LDV Fuel Consumption Goal



FE Roadmap Vision, Goals and Recommended Actions



Thank You