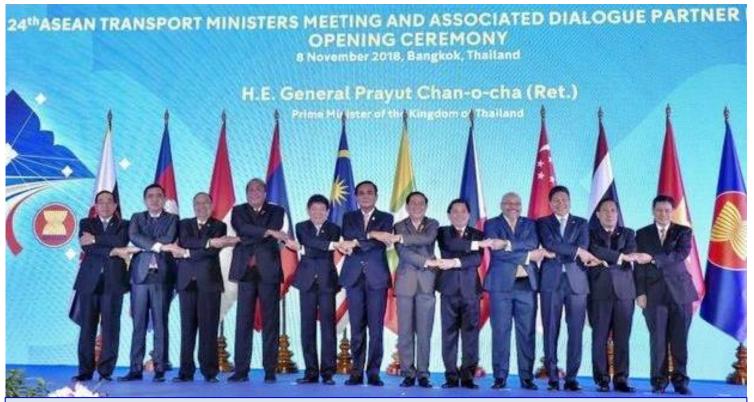


### Adoption of ASEAN Fuel Economy Roadmap



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



#### **Special Credits**





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

- Current Status of Fuel Economy in ASEAN Region
- Vision, Goals, and Recommended Actions of Roadmap





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





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





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





Consumption of natural gas

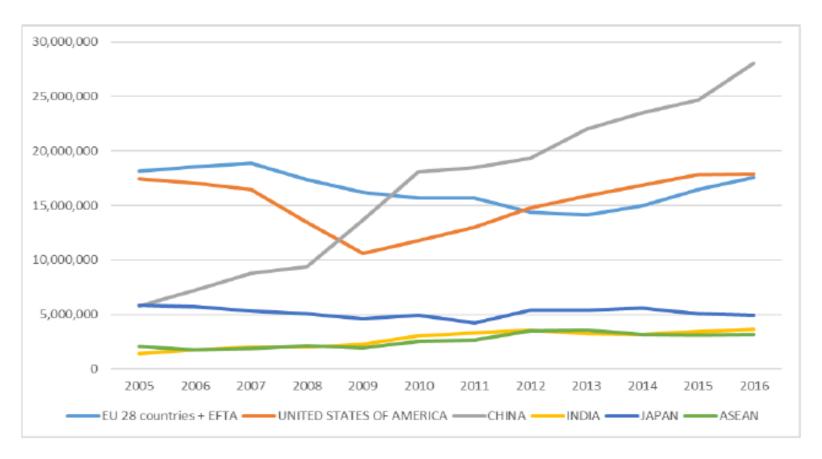


Consumption of coal



**GDP in 2018** 

## Motorisation is Increasing Rapidly

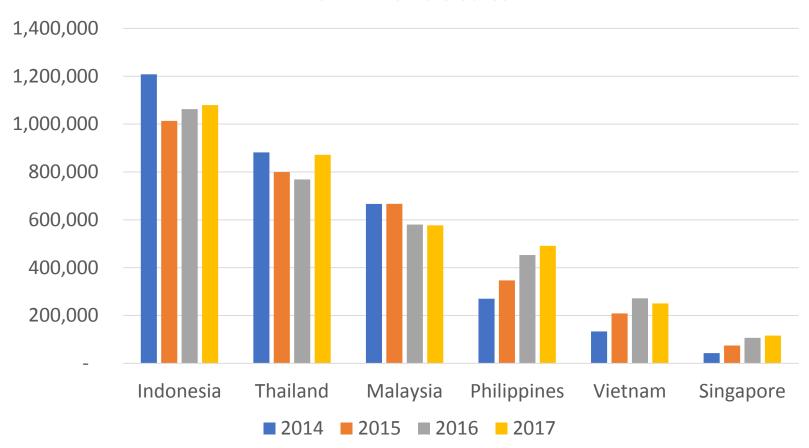


Source: EU ABC Automotive Position Paper 2017



#### Vehicle Sales in ASEAN Markets

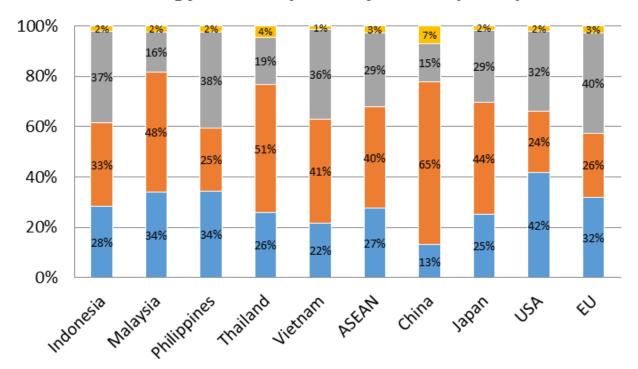
**ASEAN Vehicle Sales** 





### Transport Share of Energy Consumption

Energy consumption by sector (2012)

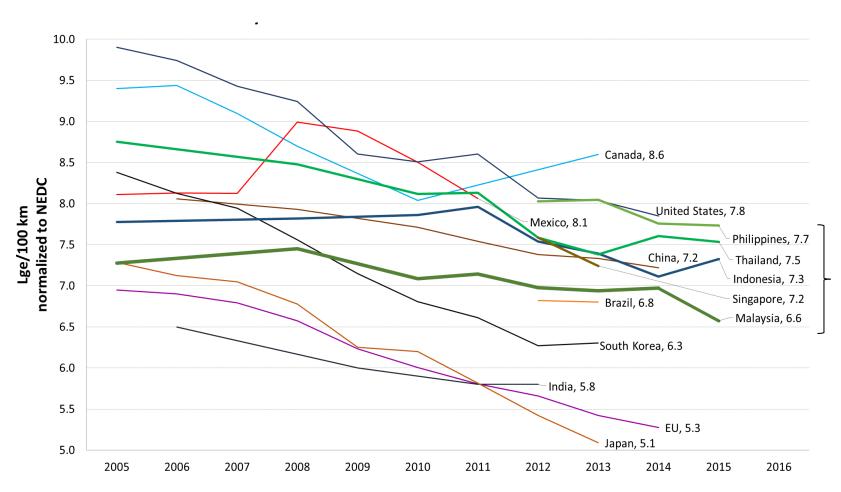


■ Transport ■ Industry ■ Residential & commercial ■ Agriculture & other

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



### LDV Fuel Consumption Trends around the World



Sales
weighted
average:
7.2
Lge/100km

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 m<sup>2</sup> in ASEAN
- almost 4.1 m<sup>2</sup> for the world average

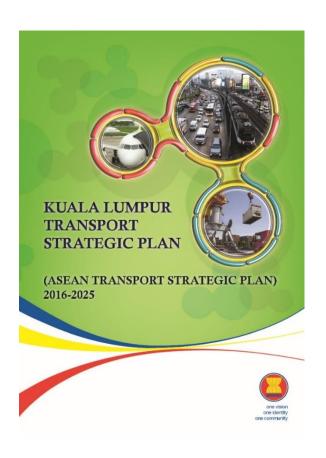
3% less fuel efficient

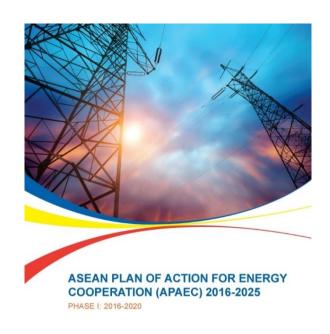
- 7.2 Lge/100km in ASEAN
- 7.0 Lge/100km for the world average

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	KLTSP Milestones
ST-1.3.1	Establish a <b>platform</b> to discuss matters related to fuel economy for the transport sector
ST-1.3.2	Formulate a fuel economy <b>roadmap</b> for the transport sector in ASEAN including policy guidelines
ST-1.3.3	Support to the development and adoption of nationally appropriate <b>policies</b> 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 1<sup>st,</sup> 2<sup>nd</sup> and 3<sup>rd</sup> Forum at www. transportandclimatech ange.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,

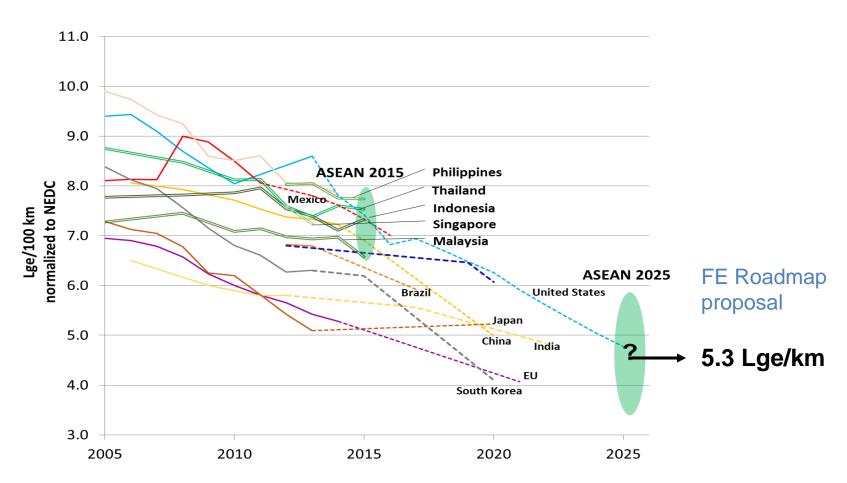
helping to meet regional and national goals for sustainable transport, energy efficiency and climate change mitigation, while supporting the vision of the ASEAN Economic Community 2025,

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

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

Goals

1: Average fuel consumption per 100 km of new light duty vehicles sold in ASEAN is improved by 26% between 2015 and 2025

2: Common indicators and methodologies as well as baseline data for fuel economy are defined

3: Regional cooperation, national action, and fuel economy policy leadership are established

4: Fuel economy label information is regionally aligned

5: Introduction or enhancement of fiscal policies based on fuel economy or CO<sub>2</sub> emissions

national fuel economy standards for LDVs in all markets, striving towards a regional standard in the long term

6: Adoption of









5.2 Exchange



methodologies

2.2 Develop fuel

economy baseline

- 3.1: Continue regional cooperation among common indicators policymakers and experts
  - 3.2 Enhance collaboration of government agencies, research institutions, and automotive industry
- 4.1: Convene the agencies of AMS responsible for fuel economy labels
- 4.2: Develop a common set of
- 5.1 Introduce and strengthen fuel economy or CO2
- measures at emission-based national level fiscal policy
  - 6.2 Develop an ASEAN wide light duty vehicle fuel

6.1: Introduce and

strengthen policy

Actions

and

data

Vision

- 3.3 Leadership on the issue of fuel economy policies
- baseline information
- lessons learned on fiscal policy implementation
- economy standard

### Thank You