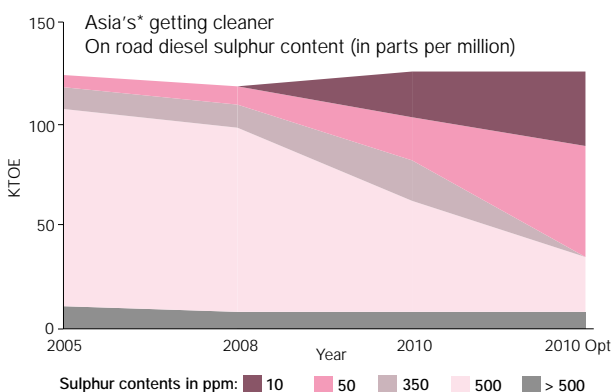


Leapfrog or get isolated

The danger India faces today, in the world of cleaner diesel

■ **Overlooked!** The world is no longer swamped with sulphur-thick diesel — over 80 per cent of diesel fuel sold globally has sulphur content of 500 ppm or less

■ **Incredible!** By 2010 as much as 70 per cent of diesel sold globally will have sulphur levels of 50 ppm or less — a clear impact of the early shift of the US and Europe to 15/10 ppm sulphur level



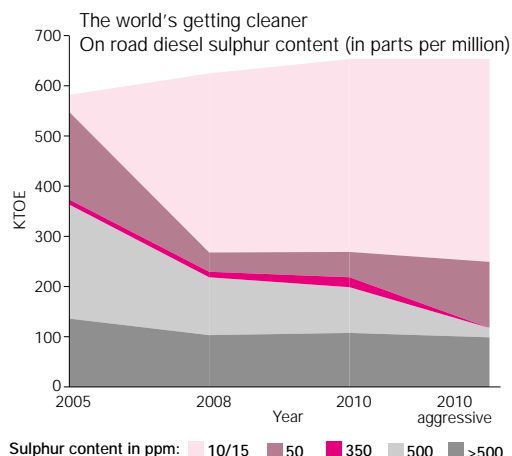
*Without Japan, Australia and New Zealand; KTOE: thousand tonne oil equivalent

■ **Possible!** If the major Asian and Latin American countries meet their aggressive targets and do what they truly can and must, 80 per cent of all diesel fuel can have sulphur content of 50 ppm or less and over 60 per cent will meet 10 ppm or less in 2010

■ **Surprise!** The transition stage of 500-350 ppm fuel sulphur will be very short, and will constitute not more than 5 per cent of the global fuel market ever. Reason? With the industrialised North already out of this stage, the big developing countries including China, Brazil, Thailand, will also leapfrog to 50 ppm sulphur levels

■ **Skewed!** In 2010 only 15 per cent of the global fuel market dominated by Africa and parts of Asia — still small users of fuel — will languish at fuel sulphur content over 500 ppm

■ **Asia-wise!** Change expected in China and India during 2008-2010 will have an



overbearing impact on the Asian market — an astounding 93 per cent of diesel in 2010 can be below 500 ppm sulphur. Remember — only seven among the 19 Asian countries studied consume nearly 90 per cent of the automotive fuels in Asia

■ **Pay heed... !** If India fails to get 50 ppm sulphur diesel, it will stand isolated from nearly two-third of the global diesel fuel market

■ **Or else... !** Drain out sulphur — “the lead of the new century”. Or it will block out all advanced emissions control technologies needed to cleanse diesel emissions

Source: Walsh, Michael P 2005, Asian Low Sulfur Fuel Trends, mimeo

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