

DRAFT Memo

To: Interested Parties

From: Michael P. Walsh

Subject: Lead in Gasoline

Date: March 25, 2001

In June 1999, a summary was prepared which attempted to identify countries which had eliminated the sale of leaded gasoline, those which had decided to do so within the next several years and major users of leaded fuel which were likely to continue unless significant efforts were launched. A great deal of progress has occurred since then. Therefore this memo is being prepared in an effort to update that exercise.

1. Countries Which Have Already Phased Out The Use of Lead in Gasoline

The following fifty eight (58) countries are estimated to either already have phased out the use of leaded gasoline or are expected to do so before the end of 2001:

Argentina
Austria
Bahamas
Bangladesh
Belgium
Belize
Bermuda
Bolivia
Brazil
Bulgaria
Canada
China
Colombia
Costa Rica
Czech Republic
Denmark
Dominican Republic
Ecuador

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Egypt
El Salvador
Finland
France
Germany
Guam
Guatemala
Haiti
Honduras
Hong Kong
Hungary
Iceland
India
Jamaica
Japan
Luxembourg
Malaysia
Mexico
Monaco
Netherlands
New Zealand
Nicaragua
Norway
Philippines
Portugal
Puerto Rico
Saudi Arabia
Singapore
Slovakia
South Korea
Sweden
Switzerland
Taiwan
Thailand
Trinidad and Tobago
United Kingdom
United States
Uruguay
U.S. Virgin Islands
Viet Nam

2. Countries Which Are Expected To Phase Out The Use of Lead in Gasoline in 2002

An additional eleven (11) countries are expected to join the Unleaded Club by the end of 2002 as listed below.

Australia
Bahrain
Greece
Ireland
Italy
Kuwait
Oman
Panama
Qatar
Spain
United Arab Emirates

3. Countries Which Are Expected To Phase Out the Use Of Lead in Gasoline in 2003

Indonesia is expected to join the Unleaded Club in this year.

4. Countries Which Are Expected To Phase Out the Use Of Lead in Gasoline in 2005

One (1) additional country, Peru, is expected to join the Unleaded Club in 2005, bringing the total to 71 countries by that time.

5. Additional Countries Which Are the Most Likely Candidates To Phase Out the Use Of Lead in Gasoline by 2005

There are three (3) additional countries which are highly promising prospects for phasing out the use of lead in gasoline by 2005 but have not yet made firm decisions to do so, at least to my knowledge. These countries are listed below.

Romania
Chile
Poland

6. Major Targets of Opportunity

Based on their continued high consumption of leaded gasoline, the following countries should receive major additional focus to eliminate lead in gasoline.

Confederation of Independent States
Nigeria
Venezuela
South Africa
Iraq
Libya
Algeria
Iran
Turkey
Syria
Israel

7. Overall Summary

Summarizing the above leads to the following conclusions:

- 58 countries have already phased out the use of leaded gasoline (or will do so during 2001) and this will likely rise to 71 countries by 2005
- about 86% of all gasoline sold in the world is currently unleaded and this will likely rise to 89% by 2005
- an additional 3 countries already use unleaded gasoline and seem to be prime candidates for complete lead phase out; if lead were eliminated in these countries, the total fraction of unleaded sales would rise to 90%.