Overview of the UN Environment Used Vehicle Report

12th PCFV Global Partners Meeting

Ariadne Baskin, UN Environment
i. Why Improve Used Vehicles?

ii. UN Environment’s Work on Used Vehicles

iii. First Findings – Global Status of Used Vehicle Report
   - The Current Situation: Global Supply Chain
   - The Current Situation: Regulatory Environments
   - Regional Overview: Africa and Latin America & the Caribbean

iv. Opportunities and Challenges

v. New Global Programme

vi. Way Forward
Why improve used vehicles?

Direct correlation between basic import restrictions and a less outdated and more clean and technologically advanced fleet

- Vehicle model year highly correlated with safety (individual vehicles may also become less safe as they age)
- Strong correlation with pollutant emissions
- Rising correlation with fuel consumption/CO2 emissions
- Correlation between operating costs (maintenance/ fuel) and age
- Oil consumption & import
- Vehicle scrappage/disposal issues
- Opportunities to leapfrog to cleaner technologies
UN Environment Work

• Global Used Vehicle Database
  • How many vehicles does X import? What is the port of entry? Who are the main exporters?
  • How does X govern the intake and maintenance of used vehicles? Age, emission, mileage, fiscal?
  • Does X incentivize, offer tax breaks for clean technology (Ev’s)?

• Africa Used Vehicle’s National Questionnaire

• First Finding – Global Status of Used Vehicle Report

• PCFV Used Vehicle Working Group
  • PCFV Strategy Report

• New Global Programme
First Finding’s – Global Status of Used Vehicles Report

Objective
The report seeks to increase the understanding of how regions and countries fit into the global supply chain of used vehicles and measure in terms of regulatory performance as well as measures that can be taken to ameliorate the quality of technology of these flows.

Set to address:
- the scarcity of data and limited understanding of used vehicle flows
- The impact of used vehicles on the environment (local pollutants, health and emissions), safety and economies in emerging and developing markets that rely on used vehicle imports

165 countries in 5 regions: (1) Africa, (2) Asia-Pacific, (3) Eastern Europe, the Caucasus and Central Asia (EECCA), (4) Latin America and the Caribbean (LAC) and (5) the Middle East and North Africa (MENA).

Part 1: **Global supply chains, scale and quality of used vehicle flows** to and within the five regional markets

Part 2: **Current regulatory environments**. This enables regional and cross-regional comparison of policy actions that can be used to attract cleaner, more energy-efficient and safer vehicles and to help develop regulatory pathways for developing and transitional markets.

Part 3: **5 regional summaries**
The Current Situation

Global Overview
Supply Chain
Regulatory Environments
Supply Chain:
Three Major Global Exporters of Used Vehicles (2017)

Japan: 931,000
EU: 946,000
USA: 650,000
Total: 2.5 million

Japanese Export Vehicle Inspection Center (JEVIC)
US Department of Commerce, International Trade Administration
Eurostat

Used vehicles exports
A 20,000 - 145,000
B 145,000 - 270,000
C Higher than 270,000
Current Actions: Global Strategies to Ensure Clean and Safe Used Vehicles

**Regulatory:**
- **India, Chile, South Africa** – Ban on used vehicle imports
- **Sri Lanka** – Banned importation of all motor vehicles less than EURO 4 (2018)
- **Cote d’Ivoire** – Mandatory fee for road safety, congestion and pollution; 5 year age limit (2018)
- **Egypt & Bhutan** – Allows the import of electric used vehicles
- **Australia & New Zealand** – Euro 6; Extensive roadworthiness & crashworthiness requirements
- **Bahamas, Kazakhstan, Bangladesh, Maldives** – 5 year age limit

**Fiscal Incentives:**
- **Sri Lanka** – Differentiated tax: electric – 25%, hybrid – 58%, petrol – 253%, diesel – 345%; Eliminates all duty on electric vehicles
- **Mauritius** – progressive excise tax that promotes the use of more energy efficient vehicles, based on engine capacity and CO2 emissions
- **Ukraine**– excise taxes lower for vehicles with smaller engine volumes and lower CO2 emissions. Electric vehicles exempted from tax and VAT.
- **Barbados**– 25% duty elimination on EVs and hybrids (compared to 65%), 45% duty on batteries and chargers; Environmental levy ($250); 10 year age restriction.
‘Strong’ applies to countries that have a Euro 5 or above emission standard and/or ban used vehicles over 3 years and/or have strong tax, fee bate schemes;

‘Good’ applies to countries that have a Euro 4 emission standard and/or ban used vehicles over 5 years and/or have a good taxation scheme in place;

‘Weak’ applies to countries that have a Euro 3 or below emission standard and/or ban used vehicles over 8 years and/or have a weak taxation scheme in place;

‘Very weak’ environment in which countries allow vehicles over 9 years and have no emission regulations in place as well as having ineffective/ or no taxation schemes.

Banned represents countries that impose a total ban on used vehicles.
Latin America
Colombia, Peru, Dominican Republic

**Colombia**: Bans used vehicles

**Peru**: Euro 4; 5 year age limit

**Dominican Republic**: 5 year LDV; 15 year HDV; CO2 Emissions Tax

![CO2 emissions graph](image1)

*Colombia* 163 g/km  
*Peru*: 178 g/km  
*DR*: 229 g/km

![Fuel Economy graph](image2)

*Colombia* 14.3 km/l  
*Peru*: 13.1 km/l  
*DR*: 10.2 km/l
Situation

• 45 million Vehicles in Africa (2015) (OICA)
• 85-100% in most countries are used vehicles (LDVs & HDVs)
  • 1:131 ratio of new cars to used in Nigeria (2017)
  • 95% + Burkina Faso, Burundi, Cameroon, Malawi, Mali, Niger, Sierra Leone, Uganda, Zambia, Zimbabwe...

• 2040, there will be nearly 137 million more light duty vehicles in Africa than in 2015, a growth of nearly 400% (World Bank, 2018)
• In 2014, automotive imports valued $48 billion and exports totaled $1.1 billion
• In Nigeria, internet based sales account for 89% of all car sales (2015)
• Africa has the highest road traffic fatality rates – projected to increase by 112% by 2030 (WHO)
• 95% increase in transport emissions in North Africa (2000 -2016)
• 75% increase in transport emissions in Sub-Saharan Africa (2000 -2016)
  • 153% Ghana
  • 73% Kenya
  • 16% Nigeria

Without a well established vehicle manufacturing base – Africa depends on used vehicle imports for mobility.

Road traffic deaths per 100 000 population by WHO Region, 2013 and 2016
Scale of Used Vehicle Exports to Africa (2017)

**Total(Top 10):** 670,000
**Total Africa:** 1.2 million

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Japanese Export Vehicle Inspection Center (JEVIC)
US Department of Commerce, International Trade Administration
Eurostat
Share of used LDV Imports from the EU, USA, Japan (2017)

By Regions:
- Western Africa: 49%
- Eastern Africa: 13%
- North Africa: 11%
- Central Africa: 8%
- Southern Africa: 20%

By countries:
- NIGERIA: 63%
- KENYA: 13%
- COTE D'IVOIRE: 7%
- SOUTH AFRICA: 6%
- GUINEA: 6%
-Remaining: 6%

Japanese Export Vehicle Inspection Center (JEVIC)
US Department of Commerce, International Trade Administration
Eurostat
<table>
<thead>
<tr>
<th>Country</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>Benin</td>
<td>The used vehicle market in Benin is largely oriented towards informal re-exports to Nigeria and other landlocked West African countries (Chad, Niger, Mali, and Burkina Faso). It is estimated that 85% of Benin’s used vehicle imports end up in Nigeria. Benin is the starting point of a long supply chain that leads used vehicles across the continent.</td>
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<tr>
<td>Burkina Faso</td>
<td>Burkina Faso is landlocked so used vehicles are commonly transited via Cotonou (Benin) and Lomé (Togo).</td>
</tr>
<tr>
<td>Cape Verde</td>
<td>Used vehicles are transited via the Port of Luanda, Angola.</td>
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<tr>
<td>Cote d’Ivoire</td>
<td>The port of Abidjan is a major destination for used vehicles entering West Africa. The port has reduced the traffic and long waiting time of vehicles transited through the port of Cotonou (Benin) and Lomé (Togo).</td>
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<tr>
<td>Gambia</td>
<td>Traders estimate that half the re-exports passing through the Gambia are destined for Senegal, with the other half continuing on to Guinea.</td>
</tr>
<tr>
<td>Ghana</td>
<td>The main points of entry are the Port of Tema and overland from the major used vehicle ports of Abidjan (Cote d’Ivoire), Tome (Togo) and Cotonou (Benin).</td>
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<tr>
<td>Guinea</td>
<td>Guinea allows the importation of used vehicles. The main point of entry is the Port of Conakry. In 2013, Guinea was the seventh largest importer of used vehicles from the U.S, EU and Japan in Sub-Saharan Africa (Black &amp; McLennan, 2015).</td>
</tr>
<tr>
<td>Guinea Bissau</td>
<td>Guinea as a major regional importer of used vehicles supplies the majority of Guinea Bissau’s fleet.</td>
</tr>
<tr>
<td>Liberia</td>
<td>The main points of entry are the ports of Monrovia and Greenville. The majority of imports are from the United States. Guinea and Cote d’Ivoire as major regional importers of used vehicles supply the majority of Liberia’s fleet</td>
</tr>
<tr>
<td>Mali</td>
<td>The main port of entry is the Port of Dakar, Senegal. A lot of imports are received in other West African used vehicle hubs – Guinea, Togo and Benin.</td>
</tr>
<tr>
<td>Mauritania</td>
<td>The main ports of entry are the Ports of Nouakchott and Nouadhibou. Many used vehicles are transited through the port of Dakar, Senegal.</td>
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<tr>
<td>Niger</td>
<td>Niger is landlocked so used vehicles are commonly transited via Cotonou (Benin) and Lomé (Togo).</td>
</tr>
<tr>
<td>Nigeria</td>
<td>The main port of entry is Apapa and Lagos. Many vehicles are transited via the Port of Cotonou, Benin and Lomé, Togo. It is estimated that 85% of Benin’s used vehicle imports end up in Nigeria</td>
</tr>
<tr>
<td>Senegal</td>
<td>The main points of entry are the ports of Muara and Dakar. The EU (France) and U. S are the major exporters of used vehicles.</td>
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<tr>
<td>Sierra Leone</td>
<td>The main points of entry are the ports of Freetown and Pepel. Many used vehicles are transited overland via the Port of Conakry in Guinea.</td>
</tr>
<tr>
<td>Togo</td>
<td>The port of Lomé is a major destination for used vehicles destined for West Africa, particularly Nigeria. It is estimated that 75% of Togo’s imports are sold in Nigeria, the rest in Mali, Burkina Faso and Niger. Lomé is known for its low and competitive prices and flexible tax policy applied to the shipping and import of vehicles (Essoh, 2013).</td>
</tr>
</tbody>
</table>
Strong: 3 countries have a Euro 5 or above emission standard and/or ban used vehicles over 3 years and/or have strong tax, fee bate schemes;

Good: 5 countries have a Euro 4 emission standard and/or ban used vehicles over 5 years and/or have a good taxation scheme in place;

Weak: 17 countries have a Euro 3 or below emission standard and/or ban used vehicles over 8 years old and/or have a weak taxation scheme in place;

Very Weak: 25 countries allow vehicles over 9 and have no emission regulations in place as well as having ineffective/ or no taxation schemes;

Banned: 5 countries impose a total ban on used vehicles.
Age Limits on LDV Used Vehicle Imports

27 countries in Africa place a maximum age limit on imports
5 countries impose a total ban
6 countries ban import over 5 years

Snapshot of average age of vehicle imports

<table>
<thead>
<tr>
<th>Country</th>
<th>LDV age</th>
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</thead>
<tbody>
<tr>
<td>Burundi</td>
<td>8 years (2017)</td>
</tr>
<tr>
<td>Kenya</td>
<td>6.5 years (2016)</td>
</tr>
<tr>
<td>Liberia</td>
<td>10 years (2017)</td>
</tr>
<tr>
<td>Madagascar</td>
<td>15 years (2017)</td>
</tr>
<tr>
<td>Mauritius</td>
<td>1 year (2017)</td>
</tr>
<tr>
<td>Sierra Leone</td>
<td>15 years (2017)</td>
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<tr>
<td>Uganda</td>
<td>15.6 years (2017)</td>
</tr>
<tr>
<td>Zambia</td>
<td>13 years (2014)</td>
</tr>
<tr>
<td>Zimbabwe</td>
<td>13.3 years (2016)</td>
</tr>
</tbody>
</table>

Harmonization is key!
<table>
<thead>
<tr>
<th>Country</th>
<th>Regulations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Botswana</td>
<td>Maximum 100,000 kms</td>
</tr>
<tr>
<td>Egypt</td>
<td>Bans used vehicle imports with exception of electric vehicles</td>
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<tr>
<td>Ethiopia</td>
<td>220% more expensive than the value of new vehicles</td>
</tr>
<tr>
<td>Ghana</td>
<td>Used vehicles over five years old pay a graduated penalty according to year of manufacture and capacity</td>
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<tr>
<td>Mauritius</td>
<td>3 year age restriction; C02 based progressive taxation</td>
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<tr>
<td>Mozambique</td>
<td>Stratified tax on engine size (bigger engines attracting higher taxes); Extra tax on vehicles over 7 years</td>
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<tr>
<td>Seychelles</td>
<td>Incentives for hybrid (12.5 – 100%) and electric vehicles (tax exempt!)</td>
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<tr>
<td>Nigeria</td>
<td>Euro 3; 15 year age restriction; Taxes diesel vehicles higher</td>
</tr>
<tr>
<td>Sierra Leone</td>
<td>Age based taxation (5% tax increase on imported cars older than 4 years; 20% for vehicles from 5-10 years; and 30% for vehicles older than 10 years)</td>
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<tr>
<td>South Africa</td>
<td>Bans all used vehicle imports</td>
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<tr>
<td>Uganda</td>
<td>15 year age restriction; Environmental Levy</td>
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<tr>
<td>Banned</td>
<td>Restricted by Age</td>
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<tr>
<td>Algeria</td>
<td>Chad &lt; 3 yrs</td>
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<td>Egypt</td>
<td>Mauritius &lt;3 yrs</td>
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<td>Morocco</td>
<td>Seychelles &lt;3 yrs</td>
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<td>South Africa</td>
<td>Gabon &lt; 4 yrs</td>
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<td>Sudan</td>
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<td></td>
<td>Tunisia &lt;5 yrs</td>
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<td></td>
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<td>Uganda &lt;15 yrs</td>
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</table>
Dieselization—Is Africa becoming the world’s dumping ground for dirty diesel vehicles?

43 million diesels in Europe → As the market for diesels falters → Eastern Europe & West Africa

◆ Vehicle emission standards, tough inspection systems, and clean automotive fuels are lacking in the majority of African countries
◆ Even if Africa imports a high-quality diesel car — the maximum environmental benefits are not always realized due to low-quality fuel in most countries
  ◇ High sulphur levels in diesel effect efficiency of emission technologies
  ◇ Majority of African countries use fuel with sulphur levels of 2,500 to 10,000 ppm
◆ Inherently shifting markets towards bigger engines (undercuts FE benefits)

Nigeria, Ethiopia & Ghana – priced diesel fuel higher than petrol (Preventative!)
  ◇ In Ghana, the average age of used diesels imported was 1.7 years compared to 6.1 years for petrol as a result of financial disincentives against diesels.

Preventative Regulatory & Policy Measures are Needed — Both Importers & Exporters
Health

Vulnerability of Developing countries

Population-weighted annual average PM2.5

Source: The State of Global Air, 2018, Health Effects Institute, USA
Spotlight on Mauritius
Leapfrogging to Clean Technology in an Affordable Way!

The number of Electric Vehicles have increased by 80% in Mauritius, from 2009-2014

- 3 year age limit
- Adopted a carbon feebate scheme in 2011 at 158 CO2g/km
- Scheme resulted to an improvement of fuel economy from 7l/100km in 2005 to 5.8l/100km in 2014
- 50% excise duty and registration fee waived on electric and hybrid cars.
- 2016 feebate abolished and moved to taxation system with additional incentives to cleaner vehicles
- The rates advantage smaller engines with cars up to 550 cc exempt from excise tax
- 25% excise duty on electric cars
Heavy Duty Vehicles

Niger
100% used
99% imported from the EU
29 years average on-road age

Uganda
93% used
85.6% imported from Japan
17 years average on-road age
29.3 l/100km (2014)
1149.8 gCO2/km (716.5 petrol)
2.4 billion Ugshs if diesel HDV’s carbon credit was traded (2014)

Mauritania
88% Used
85% imported from Japan
11 years average import age

Information on HDVs in Africa is scarce
Major impact on emissions, air pollution & safety!
Regional Overview: LAC

Lima, Peru
Where are these vehicles coming from? (2017)

Total (Top 10): 284,000
Total LAC: 311,000

<table>
<thead>
<tr>
<th>Country</th>
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<th>USA</th>
<th>EU</th>
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Japanese Export Vehicle Inspection Center (JEVIC)
US Department of Commerce, International Trade Administration
Eurostat
Share of used LDV Imports from the EU, USA, Japan (2017)

By Regions:
- Caribbean: 35%
- South America: 30%
- Central America: 36%

By Countries:
- CHILE: 29%
- MEXICO: 20%
- DOMINICAN REPUBLIC: 15%
- JAMAICA: 9%
- GUATEMALA: 7%
- REMAINING: 9%

Japanese Export Vehicle Inspection Center (JEVIC)
US Department of Commerce, International Trade Administration
Eurostat
7 countries in South America have import bans (Argentina, Brazil, Chile, Colombia, Ecuador, Uruguay, Venezuela)

11 out of 40 countries in LAC have emission standards

3 countries – Euro 5

4 countries – Euro 4

10 years – Paraguay the exception

No Caribbean Countries have emission standards
<table>
<thead>
<tr>
<th>Banned</th>
<th>Restricted by Age</th>
<th>Incremental tax or additional excise duty on age</th>
<th>Emission Standards</th>
<th>Incentive to import clean vehicles</th>
<th>No import restrictions</th>
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<tbody>
<tr>
<td><strong>SOUTH AMERICA</strong></td>
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<td></td>
</tr>
<tr>
<td>Argentina Brazil Chile Colombia Ecuador Ecuador Uruguay Venezuela</td>
<td>Bolivia Guyana Paraguay Peru Suriname</td>
<td>LDV &lt;1yrs &lt;8yrs &lt;10yrs &lt;5yrs &lt;8 yrs</td>
<td>HDV</td>
<td>Suriname Guyana &lt;4yrs</td>
<td>Argentina Brazil Bolivia Chile Colombia Ecuador Peru Uruguay Venezuela</td>
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<td><strong>CENTRAL AMERICA</strong></td>
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<tr>
<td>Belize Costa Rica Honduras El Salvador Guatemala Mexico Nicaragua</td>
<td>LDV &lt;5yrs &lt;12yrs &lt;7yrs &lt;8yrs &lt;10yrs &lt;10yrs</td>
<td>HDV &lt;15yrs</td>
<td></td>
<td>Costa Rica Mexico</td>
<td>Costa Rica Euro 4 Euro 4 Mexico Euro 4 Euro 4</td>
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Opportunities & Challenges
Challenges

• Data availability (disaggregated country used vehicle statistics) & discrepancies in trade statistics
• Lack of harmonization
• Fluidity of many nations borders & grey market
• Misconceptions on costs and benefits of cleaner and safer used vehicles
• End of life and scrappage
• Lack of policies and incentives
Leap Frogging Opportunities

180,000 electric cars & buses exported from Japan in 2018
What Needs to be Done

• Not banning but shifting to cleaner and safer used vehicle imports

• Emphasize benefits - better road safety, reduced emissions (pollution & climate), cost savings, oil imports,…

• Direct correlation between basic import restrictions and a less outdated and more clean and technologically advanced fleet -&gt; Mauritius vs. Uganda

• Need for data availability, collection & dissemination

• Need for harmonization at regional and sub-regional level

• Need for a systems approach

• Need to address the illegal practices in the export of used vehicles

• Raise awareness, show policy options and promote harmonized interventions
Setting up a New Global Programme
Past & Ongoing Activities

“ENSURING BETTER AIR QUALITY AND REDUCED CLIMATE EMISSIONS THROUGH CLEANER USED VEHICLES”

UN Environment & UN Economic Commission for Europe (20-24 Feb 2017, Geneva, Switzerland)

- Partnership for Clean Fuel and Vehicles - Used Vehicle Working Group
- Africa Clean Mobility Week Session on Used Vehicles (March, 2018)
- Global Status of Used Vehicles Report & Database
- New Global Used Vehicle Programme
Global Programme

• Set up an initiative to promote and support better quality used vehicles for Africa
• Not to ban but to regulate and improve
• Focus on safety, emissions, cost savings..
• Working with importing countries & exporting countries—Both exporters & importers need to take responsibility!
• Public & Private (trade industry)
Proposed Programme - Objectives

- **Raise awareness** among all parties involved, to ensure only quality used vehicles are exported to developing countries; and to show how used vehicles can help contribute to environment and country road safety targets and programs

- **Support importing countries with the introduction of policies and incentives** to ensure used vehicles imported contribute to better road safety and reduced emissions, and provide cost savings

- **Support exporting countries** to ensure they don’t export vehicles that can be considered as presenting major safety and environment risks in receiving countries

- **Support harmonization** of policies and incentives at regional and sub regional level

- **Provide safety and environment labeling / certificates** to quality used vehicles

- **Use a Systems approach**

- **Develop policy matrix** showing possible used vehicles policies and incentives, as being used worldwide

- **Support training and capacity building** for countries and sub-regions to raise awareness, show policy options and promote harmonized interventions

- **Support in-country programs that check the quality and compliance of used vehicles**

- **Help address illegal practices** in the export of used vehicles

- **Help develop end-of-life vehicle recycling**
Way Forward

• Release of UN Environment First Findings: Global Status of Used Vehicles
• Release of PCFV Used Vehicles Working Group recommendations
• Consultation with partners that would like to join the new global programme (PCFV?)
• Outreach to key players
  • African Governments and African intergovernmental bodies (regional and sub regional)
  • Exporting countries – Japan, EU and US
  • Exporting companies and their representative organisations
• Setting up of programme, with TORs, board, workplan
• Implementation of activities
Thank You || Merci || Ευχαριστώ

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