



WORLD LP GAS ASSOCIATION

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World LP Gas Association
Annual Report 2013

**For a cleaner, healthier
and more prosperous world**



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2013 in Brief

Goals

In 2013, the WLPGA's activities were aimed at:

- Demonstrating the benefits of LP Gas and informing, educating and influencing a variety of stakeholders.
- Supporting the development of LP Gas markets.
- Promoting compliance with standards, good business and safety practices.
- Identifying innovation and facilitating knowledge transfer.



Cooking For Life

Launched in 2012 under the Exceptional Energy brand, Cooking For Life is a hugely important WLPGA campaign that aims to convert one billion people from cooking with traditional fuels to cooking with LP Gas by 2030. The campaign took a major step forward during 2013 with the signing of a landmark cooperation agreement with the UN's sustainable Energy For All initiative.

Exceptional Energy

The global rollout of the Exceptional Energy brand continues, and continues to gain significant traction amongst the WLPGA member database. In 2013 the brand developed further with a comprehensive social media presence and a new suite of case studies.

GAIN

Promoting Autogas demand remains a core mission for the WLPGA. GAIN is the primary – and only global – network for developing and promoting Autogas demand worldwide via lobbying, developing contacts with OEM and Autogas equipment manufacturers and a strategic communications plans.

GLOTEC

The GLOTEC network supports industry growth through the promotion of new technologies and innovation. During 2013, GLOTEC produced three major new publications and continued development on the LP Gas Applications Directory – Exceptional Energy in Action.

GCN

The GCN was established in 2012 to share experience, expertise and best practices on how to manage and develop cylinder markets as well as to promote best safety and maintenance practices to build consumer confidence. In 2013 the GCN produced the Guidelines for the Development of Sustainable LP Gas Models in early-stage markets.

World LP Gas Forum

The 26th World LP Gas Forum took place in London under the theme of 'LP Gas: Making A World Of Difference'. This year's event, opened by HRH The Princess Royal, was co-hosted with the AGEPL 2013 Annual Congress and combined with the UKLPG Annual Conference and proved an unprecedented success.

In Europe and Eurasia over

15 million

vehicles run on LP Gas.



Foreword from the President



From left to right:

Dr Kandeh Yumkella, Chief Executive Officer, SE4ALL
Kimball Chen, President, WLPGA

As I start the second and final year of my term as President of the WLPGA, I am pleased to offer this update of WLPGA accomplishments in the past year and a preview of what the WLPGA hopes to accomplish in the coming year.

In 2013, the G20 Heads of State held detailed consultations with the ICC G20 Advisory Group, a global committee of leading Chief Executive Officers nominated by the International Chamber of Commerce (ICC). In my capacity as a member of that committee, I succeeded in getting “natural gas liquids” included in the list of energy sector priorities presented by the ICC to, and accepted by, the G20 Heads of State. LP Gas is finally a part of the energy investment and infrastructure policy coordination of the G20 and the world economy which they lead.

This year’s efforts to position LP Gas as a global development priority bore fruit in the London signing in October of a Joint Statement by the WLPGA and UN Sustainable Energy for All (SE4All), to work together to accelerate access to LP Gas for cooking for one billion people by 2030. The international system has finally prioritized the need to expand the use of LP Gas worldwide. Lives will be saved, forests will be conserved, large markets will be created and substantial profits will be generated – indeed, a set of outcomes for which we should all be grateful and of which we should all be proud.

In the coming year, I also expect significant advances in the expansion of LP Gas use in key developed country markets, such as rural areas and Autogas.

Gaining increased recognition by governments and by international institutions is only accomplishing half the job. For the WLPGA and its Members to benefit from governmental desire to support LP Gas, the WLPGA and its Members must be considered reliable partners by international organizations, capital markets, regulatory authorities and standards development organizations. To strengthen the long-term consistency and excellence of the WLPGA, key WLPGA objectives for 2013 were to ensure better planning, to use resources efficiently and to maintain policy continuity. To those ends, the WLPGA Board and Industry Council, ably supported by WLPGA senior staff, completed a new three-year strategic plan, which will guide WLPGA operating activities in the period 2014-2016. In addition, a new leadership process has been established in which the past President, current President and expected next President of WLPGA, meet to coordinate planning and policies across a rolling six-year time horizon representing the three Presidencies.

In conclusion, I expect that continued effective work by, and cooperation among, WLPGA staff and Member representatives will result in the innovations, market expansions, increased profitability and positive contributions to society which we desire as the results of our work.

Global LP Gas consumption
in 2012 rose by **1.8%**



Managing Director's Introduction



James Rockall
WLPGA CEO and Managing Director

In an economic climate that continued to be somewhat depressing in OECD countries in 2013, our industry and our industry association, the WLPGA, have performed exceptionally well. Not only is LP Gas production rising but demand has also stood up well to the economic challenges.

If we consider that 3 billion people, or 40% of the planet, lack access to clean cooking or heating solutions; that of the one billion vehicles on the road contributing some 25% of emissions, only 2% are fuelled by LP Gas, or that in Europe, of 40 million households not on the natural gas grid, only 17% consume LP Gas, then we realise that our Exceptional Energy has a very bright future. As the global economy begins its long-awaited emergence from its current slump, the LP Gas industry is well poised to take advantage of this world of opportunities.

The WLPGA has been more active than ever in representing our industry and seizing these opportunities for our members. 2013 marks the end of a three-year plan that has seen our membership grow year-on-year to new record levels. We have exceeded many of our objectives as we react to the opportunities that arise and indeed, the signing of a cooperation agreement with the UN Sustainable Energy for All initiative epitomises the proactive approach that

WLPGA has taken to ensuring that LP Gas remains a high focus for policy makers worldwide.

We will build on the successes of the last few years with our new three year strategic plan that, with the full engagement of our members, will take us onwards to 2016 with a suite of projects and initiatives designed to further expand our markets and provide opportunities for our membership in all aspects of the business in every part of the world.

“We are the global voice of the LP Gas industry. If you are a stakeholder in this business; if you want to be a part of it, to benefit from it and have your own opinion heard, then join this dynamic and influential group of LP Gas industry leaders that is the WLPGA.”



About the Industry



What is LP Gas?

Liquefied Petroleum Gas (LP Gas) is a portable, clean and efficient energy source which is readily available to consumers around the world. LP Gas is a co-product of natural gas and crude oil production; its unique properties make it a versatile energy source which can be used in more than 1,000 different applications.

LP Gas is a clean energy solution, which emits 50% less CO₂ emissions than coal and 20% less than heating oil, making it ideal for use in heating and cooking applications. LP Gas also improves both indoor and outdoor air quality by substantially reducing

pollutants which are hazardous to health, such as SO_x, NO_x and Particulate Matter.

The big picture for LP Gas in 2012 shows an industry with a product in high demand in particular regions and sectors – and busily extending its reach and appeal to new markets and applications. The industry is seeing innovation in a wide variety of applications, from lightweight domestic cylinders to imaginative new uses as a dual fuel in both boilers and as a vehicle fuel.

Where is it used?

LP Gas has more than 1,000 applications: it is used in transportation, in commercial business, industry, farming, domestic heating and cooking, and for recreational purposes. The domestic sector is one of the most popular applications for LP Gas with almost 45% of the global demand for LP Gas coming from residential cooking and heating demands.

Overall global Autogas demand reached 23.9mn t in 2012, 2.5% higher than in 2011 and represents almost 9% of total LP Gas consumption worldwide (2012 data). Autogas is well established in many countries in the world that have enabling legislation.

Leading Markets

In 2012 global LP Gas production reached a record high of 274 million tonnes, with the North America region growing 3.2%.

The global LP Gas market is expected to increase substantially in the next decades as LP Gas markets in Asia and Africa grow.

Value of LP Gas

- The LP Gas industry gives work to over 2 million people around the globe, while approximately 3 billion people use LP Gas.
- LP Gas has a higher efficiency than natural gas-fuelled distributed power generation, which makes it ideal for rural homes and businesses.
- There are now more than 23 million Autogas vehicles in use around the world.

The latest data on the LP Gas market is available in the WLPGA Statistical Review of Global LP Gas 2013, which is available at no charge to WLPGA members.



About the WLPGA

Vision & Mission

The WLPGA is the authoritative voice of the global LP Gas industry representing the full LP Gas value chain. The primary aim of the association is to add value to the sector through driving premium demand for LP Gas, while also promoting compliance to good business and safety practices. It brings together private and public companies involved in one, several or all activities of the industry, it develops long-term partnerships with international organisations and implements projects on local and global scales. The association was established in 1987 and granted Special Consultative Status with the United Nations Economic and Social Council in 1989.



Steve Wambold
President & CEO
Ferrellgas

The World LP Gas Association Vision

As the authoritative global voice for LP Gas, the WLPGA promotes the use of LP Gas worldwide to foster a cleaner, healthier and more prosperous world.

The World LP Gas Association Mission

- Demonstrate the benefits of LP Gas and inform, educate and influence all stakeholders.
- Support the development of LP Gas markets.
- Promote compliance with standards, good business and safety practices.
- Identify innovation and facilitate knowledge transfer.

"Ferrellgas is proud to be a member of the World LP Gas Association. Ours is a small industry, and visiting and sharing ideas with colleagues around the world who face the same issues in their business is incredibly helpful and quite frankly-rewarding. I was never more proud of our industry and the association during the London forum. The topics and agenda were forward looking, informative and inspiring. I brought home several new ideas I was able to implement into my business and the experience for those attending members of my staff was both developmental and memorable. I look forward to continuing our partnership with this great organization for many years to come."



Benefits to Members

The WLPGA is the global voice for the LP Gas industry, uniting the broad interests of the worldwide LP Gas industry into one strong independent organisation that spans the world. It is the WLPGA members that drive the association and therefore we offer them the best range of benefits:



Network

The WLPGA is a growing leadership network with more than 200 members operating in over 125 countries. The WLPGA network brings together leaders of organisations from the entire LP Gas value chain including, since 2010, observer members from academic bodies, inter-governmental organisations, NGOs and national governments.

■ Access

The WLPGA members have access to the largest LP Gas industry focused network in the world which gives them an opportunity to present their position to the entire industry. With members strategically located around the world and by organising regular regional and global events, the WLPGA is an effective platform for members to meet, exchange information and experiences and explore new business opportunities in both mature and developing LP Gas markets.

■ WLPGA Networks

The WLPGA has member-driven networks such as the Global Technology Network (GLOTEC), which provides space for discussion and sharing of ideas for developing LP Gas businesses through the application of new technology. The WLPGA also hosts an annual

Global Technology Conference (GTC) where industries can showcase their technologies. In addition to GLOTEC, the WLPGA also runs the Global Cylinder Network (GCN) and the Global Autogas Industry Network (GAIN). All networks provide the LP Gas community with a valuable platform to share its local experiences, technological developments and innovative solutions.

■ Annual World LP Gas Forum

The annual World LP Gas Forum has become the most important event in the calendar for the LP Gas industry, attracting hundreds of exhibitors, and thousands of delegates each year. The event, attended every year by top executives of the LP Gas industry from all around the world, gives WLPGA members an excellent opportunity to meet “everyone you need to know” in the LP Gas sector, and beyond. The WLPGA offers its members preferential treatment during the conference, including the possibility to network at the yearly Members’ Dinner.



Information

One of the key goals of the WLPGA is to inform and educate all stakeholders about the benefits of LP Gas. The WLPGA offers its members an opportunity to exchange views on the upstream and downstream parts of the LP Gas business, by regularly organising interactive meetings and in-country workshops between technical experts, senior members and key stakeholders. The WLPGA is also able to foster extended influence by offering its members a highly credible source of information to enable members in their own lobbying and outreach initiatives.

■ Business Contacts for Members & Member Queries

The WLPGA provides its members with a permanent query service, covering such topics as: fuel specification standards; equipment standards; consulting firms; engineering firms; regulations; safety rules; model taxation policies; new business contacts; new technologies; etc.

■ Member Contact Information

The WLPGA maintains an up-to-date Member Directory with full contact details of all members of the WLPGA. This directory is also available as a Smartphone application for a real time networking capability.

■ Members'only Extranet

The WLPGA provides a members-only, password-protected and customer-oriented web service. This online information system contains data, reports and relevant links, allowing members to access information in a sustainable way.

■ Exceptional Energy Industry Toolkit

WLPGA members have access to the complete Exceptional Energy branding toolkit which comprises a comprehensive range of branding graphics and complementary resources enabling members to fully adopt the brand.

■ Cooking For Life Toolkit

To support the newly launched Cooking For Life campaign under the Exceptional Energy Brand, members also have unique access to a full campaign toolkit including a suite of advertisements, posters, and fact sheets. Members are encouraged to support the campaign by downloading and using this collateral.

■ Members-only Reports

The WLPGA publishes reports for exclusive distribution to its members.



■ Email Reports / Newsletters

The WLPGA issues regular activity and news reports via email, updating all members on WLPGA actions, achievements, Board and Industry Council meetings, projects, new international developments and external representation. The Voice Newsletter and the Autogas Updates are key examples.

■ Global LP Gas Statistics

Members receive one free copy of the WLPGA Statistical Review of Global LP Gas, the highly referenced annual publication used throughout the industry, providing LP Gas production and consumption data for more than 100 countries around the globe.



Stuart Weidie
President & CEO
Blossman Gas Inc.

“Membership in the World LP Gas Association presents a unique opportunity to gain a global perspective on the issues and opportunities within the LP Gas industry. I have found the content at the annual forum to be the most informative industry event I participate in each year and I look forward to the 2014 Forum in Miami.”

■ Publications

Members receive one free copy of all new publications. Publications such as the annual WLPGA Statistical Review of Global LP Gas and WLPGA Guidelines on Good Business and Safety Practices are the global industry reference points.

Education

Investing in knowledge building among members and in educating key stakeholders is an important part of the WLPGA's work.

■ Workshops & Training Courses

The WLPGA regularly organises interactive workshops and courses between technical experts, members and key stakeholders to demonstrate the benefits of LP Gas.

Members are entitled to participate at preferential rates.

■ Exceptional Energy Brand

The WLPGA developed a single brand to raise awareness of the exceptional features of LP Gas among policymakers, industry and consumers. The brand is exclusive to WLPGA members and includes a series of practical messaging tools and communication materials.

■ Special Projects for Members

The WLPGA coordinates specific custom-made projects for consortiums of at least three members.

Influence

The WLPGA develops partnerships with influential international bodies which enables it to address major issues with key stakeholders such as policy-makers and key opinion leaders.

■ Access to International Institutions

Membership brings members direct access to intergovernmental organisations, only possible through an independent organisation such as the WLPGA. The WLPGA has a Special Consultative Status with the United Nations. It also has partnerships with several major international institutions including, the World Bank, the Asian Development Bank and the International Energy Agency.

■ Global Leadership Position

The WLPGA unites the broad interests of the worldwide LP Gas industry into one strong independent organisation. The diversity in the WLPGA's members allows an effective broad industry representation, where members benefit from a powerful leadership position.

Credibility

Since 1989, the WLPGA has had official Consultative Status with the United Nations Economic and Social Council (UN ECOSOC). It has also developed long standing partnerships with other international bodies such as various departments of the UN, the World Health Organization (WHO), Regional Development Banks and a number of well-respected international NGOs such as the Partnership on Clean Indoor Air (PCIA) and E+Co. The geographical spread and diversity of the WLPGA's membership makes the association a representative, trusted and logical partner in international discussions.

Who can join the WLPGA?

Any organisation that has an interest in the LP Gas industry can join. There are various categories of membership available to interested organisations.



The backbone of the industry remains the residential and commercial demand. Its share of overall LP Gas consumption remains stable at around **44.4%**



Membership 2013

WLPGA has a global membership base with over 200 members in over 125 countries.
A full list of WLPGA members during 2013 is below.

Africa

Afriquiagaz [Morocco](#)
Afrox [South Africa](#)
Allied East Africa LTD [Kenya](#)
Caisse de Stabilisation des Prix des Hydrocarbures [Cameroon](#)
Geres [Morocco](#)
LP Gas Safety Association of Southern Africa (LPGSASA) [South Africa](#)
Naftal [Algeria](#)
Nigeria LP Gas Association [Nigeria](#)
Nigerian National Petroleum Corporation (NNPC) [Nigeria](#)
Nile Petroleum Company Ltd. [Sudan](#)
Oando Marketing Plc [Nigeria](#)
Pilot International [Uganda](#)
Premier Gas Company Limited [Kenya](#)
Salam Gaz [Morocco](#)
SNDP [Tunisia](#)
Sonatrach [Algeria](#)
Strategic Energy Limited [Nigeria](#)
Thomas Aquinas Foundation [Ghana](#)
TSL Logistics Limited [Nigeria](#)
Ultimate Gas Ltd. [Nigeria](#)

Asia

2A Muhendislik San. Tic. A.S. [Turkey](#)
Altinboga Gas Equipments [Turkey](#)
Astomos Energy Corporation [Japan](#)
Aygaz A.S. [Turkey](#)
Bharat Petroleum Corporation Limited [India](#)
Bhiwadi Cylinders PVT. LTD. [India](#)
Brothers Gas [United Arab Emirates](#)
Clean Air Asia [Philippines](#)
Cosmo Petroleum Gas Co. Ltd. [Japan](#)
Eneos Globe Corporation [Japan](#)

E.ON Masdar Integrated Carbon (EMIC) [United Arab Emirates](#)
E1 Corporation [South Korea](#)
Elpiji (M) SDN. BHD [Malaysia](#)
Emirates Gas LLC [United Arab Emirates](#)
Energy Market Regulatory Authority [Turkey](#)
Energy Reform Co. Ltd. [Thailand](#)
GAIL (India) Ltd. [India](#)
Gasco Saudia Arabia [Saudi Arabia](#)
Hascol Petroleum Limited [Pakistan](#)
High Pressure Gas Safety Institute [Japan](#)
Hindustan Petroleum Corporation LTD. [India](#)
Indian Auto LPG Coalition - IAC [India](#)
Indian Oil Corporation Limited [India](#)
Isla LPG Corporation [Philippines](#)
Ito Koki CO, LTD. [Japan](#)
Iwatani International Corp. [Japan](#)
Japan LP Gas Association [Japan](#)
Jordan Petroleum Refinery [Jordan](#)
Koagas Nihon CO, LTD [Japan](#)
Korea Gas Safety Corporation [South Korea](#)
Korea LPG Association [South Korea](#)
K.R. Fuels [India](#)
Laugfs Gas Plc [Sri Lanka](#)
Litro Gas Lanka Limited [Sri Lanka](#)
LP Gas Center of Japan [Japan](#)
LPG Association of Pakistan [Pakistan](#)
LPG Industry Association Inc. [Philippines](#)
Maldiva Gas Pvt Ltd [Maldives](#)
Mauria Udyog Limited [India](#)
Metal Mate [Thailand](#)
Natgaz [Lebanon](#)
National Gas Company - SAOG [Oman](#)
NewOcean Energy Holdings Limited [Hong Kong SAR China](#)
Oil and Gas Regulatory Authority [Pakistan](#)

Parco Pearl Gas [Pakistan](#)
Pazgas Ltd. [Israel](#)
Pertamina [Indonesia](#)
Petredec Services (Asia) Ptd Ltd [Singapore](#)
Petrofed - Petroleum Federation of India [India](#)
Petronas [Malaysia](#)
Petrovietnam Gas Trading Company [Vietnam](#)
Reliance Industries Limited [India](#)
Rinnai Corporation [Japan](#)
Saisan CO LTD [Japan](#)
Saudi Aramco [Saudi Arabia](#)
SCG (THAILAND) CO., LTD. [Thailand](#)
Shanghai LPG Management CO. LTD. [China](#)
Shell Hong Kong [Hong Kong SAR China](#)
Showa Shell Sekiyu K.K. [Japan](#)
SK Gas [South Korea](#)
SSGC LPG (Pvt.) Limited [Pakistan](#)
Sunrise LP Gas & Energy (Taiwan) Group [Taiwan, Republic of China](#)
Taiwan L.P. Gas [Taiwan, Republic of China](#)
Transvalves (India) Private Limited [India](#)
Turkey LP Gas Association [Turkey](#)
Yachiyo Industry Co. Ltd. [Japan](#)
Yanmar Energy System CO. LTD [Japan](#)

Australia

D J Batchen [Australia](#)
Eastland International Pty LTD [Australia](#)
Elgas [Australia](#)
Gas Energy Australia [Australia](#)
Origin Energy [Australia](#)
Wesfarmers Kleenheat Gas Pty Ltd. [Australia](#)

Europe

AEGPL [Belgium](#)
 Amtrol-Alfa Metalomecanica, S.A. [Portugal](#)
 Antargaz [France](#)
 Antonio Merloni Cylinders Ghergo Group S.P.A. [Italy](#)
 AOGLP - Asociacion Espanola de Operadores de Gases Licuados del Petróleo [Spain](#)
 Argus Media Limited [United Kingdom](#)
 Assogasliquidi Federchimica [Italy](#)
 Athelia Solutions [Spain](#)
 Butangas S.P.A [Italy](#)
 Calor Gas Limited [United Kingdom](#)
 Carbon Clear [United Kingdom](#)
 Cavagna Group [Italy](#)
 CFBP - Comité Français du Butane et du Propane [France](#)
 Clesse Industries [France](#)
 COIA GmbH [Germany](#)
 Digal Gas [Portugal](#)
 DVFG [Germany](#)
 Elaflex [Germany](#)
 Elpigaz SP. Z.O.O. [Poland](#)
 Finngas GmbH [Germany](#)
 Flaga GmbH [Austria](#)
 Flogas Britain Ltd. [United Kingdom](#)
 Flussiggas-Anlagen GmbH [Germany](#)
 Gascan, S.A. [Portugal](#)
 Geogas Trading SA [Switzerland](#)
 Gilbarco Veeder-Root [United Kingdom](#)
 Gok Regler - Und Armaturen GmbH & Co. KG [Germany](#)
 HEDON Household Energy Network [United Kingdom](#)
 Hexagon Ragasco A.S. [Norway](#)
 IDtek Track and Trace SA [Switzerland](#)
 INSA Gas OOD [Bulgaria](#)

Integrated Gas Technologies Ltd [Denmark](#)
 International Chamber of Commerce [France](#)
 International DME Association [United Kingdom](#)
 International Fertilizer Industry Association (IFA) [France](#)
 ISA - Intelligent Sensing Anywhere [Portugal](#)
 Kosan Crisplant [Denmark](#)
 Liquigas [Italy](#)
 Omal SPA [Italy](#)
 Orlen Gaz [Poland](#)
 Oryx Energies [Switzerland](#)
 Polska Organizacja Gazu Plynnego (POGP) [Poland](#)
 Primagaz [France](#)
 Prins Autogassystemen B.V. [Netherlands](#)
 REEEP [Austria](#)
 RegO Products [Germany](#)
 Repsol [Spain](#)
 Rochester Gauges International [Belgium](#)
 SHV Energy [Netherlands](#)
 Sibur International [Austria](#)
 Siraga S.A [France](#)
 The Partnering Initiative [United Kingdom](#)
 TotalGaz [France](#)
 Totsa - Total Oil Trading SA [Switzerland](#)
 Trimex Consulting S.L. | AEGPL [Spain](#)
 Tyczka Trading & Supply GmbH & Co. KG [Germany](#)
 UKLPG [United Kingdom](#)
 Vopak [Netherlands](#)
 World Alliance for Decentralized Energy (WADE) [United Kingdom](#)

North & South America

AIGLP Asociacion Iberoamericana de Gas Licuado de Petróleo [Brazil](#)

AmeriGas Propane [United States](#)
 Asociacion Chilena de Gas Licuado A.G [Chile](#)
 Blackmer [United States](#)
 Blossman Gas Inc [United States](#)
 Camara Uruguay de Gas Licuado [Uruguay](#)
 Canadian Propane Association [Canada](#)
 Corken Inc. [United States](#)
 Ecopetrol [Colombia](#)
 Empresas Lipigas S.A. [Chile](#)
 Energy Transportation Group Inc. [United States](#)
 FerrellGas [United States](#)
 Fisher LP Gas Equipment [United States](#)
 Gasco GLP S.A. [Chile](#)
 GenteGas S.A. [Guatemala](#)
 Global Alliance For Clean Cookstoves [United States](#)
 Grupo Zeta [Mexico](#)
 IHS [United States](#)
 Liquigas Distribuidora [Brazil](#)
 Mangels Industrial [Brazil](#)
 NPGA (National Propane Gas Association) [United States](#)
 Paraco Gas Corp. [United States](#)
 PERC - Propane Education & Research Council [United States](#)
 Persistent Energy Partners LLC [United States](#)
 Red Seal [United States](#)
 Sindigas [Brazil](#)
 Trovan [United States](#)
 UGI Corporation [United States](#)
 Ultragaz [Brazil](#)
 Unidad de Planificacion Minero Energetica [Colombia](#)
 Winrock International [United States](#)
 Worthington Cylinder Corporation [United States](#)

WLPGA Activity 2013

Exceptional Energy – A Year of Consolidation

The WLPGA has developed the Exceptional Energy brand to unite the industry under one single powerful entity, to enable our fragmented industry to speak with one voice, and to raise awareness of the exceptional benefits of LP Gas amongst policymakers, consumers and industry stakeholders.



Exceptional Energy is a unique brand that encapsulates the entire industry, wherever you are and whatever your role in the industry, and has gained significant traction globally. WLPGA continues to develop the brand as a major project area and strongly encourages all members to adopt the logo in their own communications.

WLPGA members have privileged access to a comprehensive ready-to-use branding toolkit which enables them to integrate **Exceptional Energy** seamlessly into their own corporate branding.

2013 has seen a significant emphasis on developing content with a suite of new case-studies showcasing LP Gas as an exceptional energy in times of natural disasters and continued work in the field directly with members, particularly during fellow association national conferences.

New campaigns are being launched under the **Exceptional Energy** umbrella – notably **Cooking For Life** and **Exceptional Energy in Action** and there are further exciting campaigns planned going forward.

The brand website www.exceptionalenergy.com comprises a master site with eight regional and translated sites, each mini-site maintaining the brand look-and-feel but allowing for regional tailoring and brand expansion. The communications team also strives to use innovative and varied communications. There is now an established social media programme with a focus on Twitter and Facebook.



“Siraga has fully embraced the Exceptional Energy brand in our communications. We appreciate the significance of a powerful brand to bring our industry together and are proud to be an active part of the Exceptional Energy family.”

Eric Batise
General Manager
Siraga

2013 also saw a truly unique opportunity to showcase LP Gas as a truly exceptional off-grid solution in extremely isolated conditions. Exceptional Energy sponsored British explorer Nick Hancock who launched a unique endurance expedition - **Rockall Solo** - to spend a record breaking number of days and nights on the remote and tiny island of Rockall off the coast of the UK. The expedition attracted significant high level media interest, in the UK and beyond, and consequently resulted in significant visibility for Exceptional Energy.

WLPGA thanks all members for their continued support.

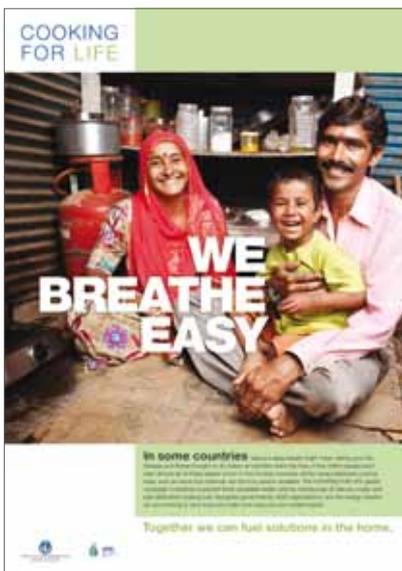
 www.exceptionalenergy.com
[@exceptionalenergy](https://twitter.com/exceptionalenergy)



Contact: **Alison Abbott**
Marketing & Communications Director
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Cooking For Life

Three billion people rely on “traditional fuels” - wood, coal, charcoal or animal waste - for cooking on antiquated stoves or open fires. Exposure to indoor air pollution from cooking this way causes the deaths of four million people annually and countless other preventable illnesses. Women and children are the most affected. Burning solid fuels for cooking is also linked to concerns on gender development, deforestation and climate change.



In 2012 WLPGA launched **Cooking For Life**, a global campaign that aims to convert **one billion people** from cooking with traditional fuels to cooking with LP Gas by 2030. To meet this ambitious goal Cooking For Life in 2013 focused on communicating the benefits of LP Gas as a product as well as laying the groundwork for future growth of the initiative. Work on the “Roadmap to a Billion”, which will define Cooking For Life’s work programme, was completed at the end of 2013. Created with the help of a working group of WLPGA members, the Roadmap will ensure Cooking For Life works together with WLPGA members to achieve its ambitious goals while creating opportunities for the industry.

At the 2013 Forum in London, WLPGA signed a landmark agreement with the United Nation’s initiative **‘Sustainable Energy for All’** (SE4ALL). Launched in 2012 by Secretary General Ban Ki-moon, SE4ALL is his signature multi-year initiative to promote access to energy in the developing world, a goal which dovetails with the aims of Cooking For Life.

In London, SE4ALL CEO, Dr Kandeh Yumkella gave an emotional address referencing the women from his native village in Sierra Leone who spent long hours every day looking for firewood and preparing food. He noted that public private partnerships like Cooking For

Life were exactly the kind of mechanisms needed to reduce and eventually eliminate entirely reliance on cooking with dangerous and dirty biomass. The letter of agreement Dr Yumkella co-signed along with WLPGA President Kimball Chen finishes by stating *“WLPGA and SE4ALL hereby acknowledge that we are committed to contribute our efforts to end both the daily degradation of the health and safety of billions of our fellow global citizens and that of our local and global environments. We are committed to use our resources as part of a global multi-stakeholder partnership to produce the systemic changes necessary to support the growth of LP Gas markets and the delivery of clean LP Gas to one billion people in developing countries by 2030”*.



Dr Kandeh Yumkella, Chief Executive Officer, SE4ALL delivers his keynote during the World Forum in London



Contact: **Michael Kelly**
Deputy Managing Director
mkelly@worldlpgas.com



The Global Cylinder Network (GCN)

GCN is the WLPGA network dedicated to sharing experience, expertise and best practices on how to manage and develop cylinder based markets, the fastest growing segment of the LP Gas industry in the developing world.

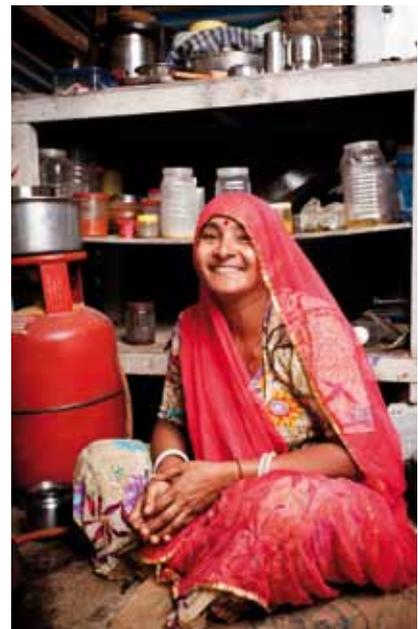


“The Global Cylinder Network (GCN) is dedicated to continue the sharing of experience, expertise and best practices on how to manage and develop cylinder based markets, the fastest growing segment of the LP Gas industry in the developing world.”

Mr Abdelkader Benbekhaled
GCN Chairman

In 2013 the GCN completed work on the **Guidelines for the Development of Sustainable LP Gas Models** early-stage market edition. This document looks at the best way to encourage long term growth in the cylinder sector of early stage markets, defined as less than 2kg consumption per person annually. This document will prove key for policy makers in developing countries who want to encourage and incentivize the long term, safe and sustainable growth of LP Gas markets in their countries and is based on the expertise and experience of the WLPGA global membership.

2013 also saw a change in leadership within GCN with founding **Chairman Renzo Bee** of **Totalgaz** stepping aside for **Mr Abdelkader Benbekhaled** of **Salam Gaz** who promised to build on the work of Mr Bee.



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The Global Autogas Industry Network (GAIN)

Transport continues to be the fastest growing segment for the LP Gas industry, with the exception of the demand for LP Gas from the chemical industry as a feedstock. LP Gas used in transport (Autogas) only accounts for 9% of the global demand for LP Gas yet it remains the most popular alternative transport fuel to gasoline and diesel.



“Interested members of the industry will find in the Global Autogas Industry Network (GAIN) the a group of people dedicated to exchanging the newest technical and policy related information on retailing LP Gas as a motive fuel.”

Mr Armando Vicoso
GAIN Chairman

Promoting Autogas demand remains a core mission of the WLPGA and the Global Autogas Industry Network (GAIN) is the association’s main vehicle to achieving this.

GAIN comprises representatives from major Autogas consuming countries including South Korea, Japan and Turkey. GAIN has been chaired by **Joel Pedessac** since 2010 and this year **Armando Vicoso** from Repsol took over chairmanship.

GAIN has three main objectives: Lobbying - especially national governments, developing contacts with the OEM and Autogas equipment manufacturers, and communicating the Autogas message.

During the year the flagship document ‘Autogas Incentives Policies’ was under review for an update and the web based series of case studies, ‘Autogas Updates’ continued to produce some remarkable stories about the Autogas industry.

A **Global Autogas Summit** was held in London during the World Forum attracting over 150 delegates. A panel of experts debated the way forward for Autogas as well as presenting some of the new ideas and technologies that are being introduced to further stimulate the segment.

Alex Stöhr joined the WLPGA in 2013 as Autogas Manager adding a valuable resource to this important activity. An Autogas Focus Group has been set up to look into the ways in which the Autogas message is communicated. The group has agreed a terms of reference to identify the need to search for gaps in current communications and update, modify and introduce new material where necessary as well as searching for new channels to convey that information. Above all the group shall focus on the strategic level of communications. Implicit in this is the decision to introduce a new dedicated website for Autogas which will launch during 2014.



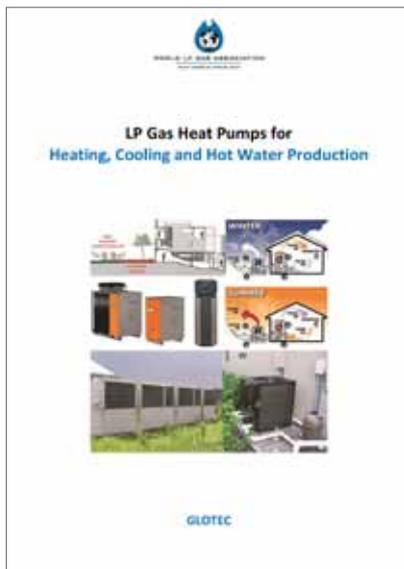
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Identification & Stimulation of Innovation

The Global Technology Network (GLOTEC): In search of the new technologies that will guide future opportunities

2013 was a year of multiple project deliveries for GLOTEC and its networking teams and a significant milestone with the nomination of a new chairman. At the GLOTEC session during the London Forum, three new publications were launched, which, in the words of the new chairman *must be a record even by GLOTEC's high standards.*



Exceptional Energy in Action – The LP Gas Applications Directory, the unique and very promising project initiated by GLOTEC, was presented in various external conferences and meetings gaining significant interest and support.

Three working group reports were produced and released during the London 2013 Forum:

LP Gas Heat Pumps for Heating, Cooling and Hot Water Production

A complete overview of LP Gas Heat Pumps which describes all the available technologies today and listing the main manufacturers. It also presents the global status of the market in the various regions, with the related positive and negative aspects and particularly the barriers that hinder development. A roadmap, with the prospects and future of these technologies, is also included, as well as recommendations that will help to create the right environment for further development and overcome the existing barriers.



Andrew Ford
GLOTEC Chairman, SHV Energy

“We are in the golden age for gas. Whilst LPG is increasingly being recognised for being a clean affordable and available fuel, if it is not aligned with highly efficient appliances, equipment, controls and services then we are in danger of missing many opportunities available to us. What we will be doing during the next 3-4 years will guide the future direction and future opportunities for the next 10 or 20. GLOTEC has a very important role here to play within the industry strategy and I am delighted to be part of it.”

Combined Heat and Power (CHP) from LP Gas - The Global Status of Micro - and Mini-CHP

A report dedicated to the technologies of producing Heat and Power combined in single units fuelled by LP Gas. All existing technologies are listed with their particular characteristics, the main active manufacturers, a status update of the global market focusing particularly on barriers that need to be addressed and includes a roadmap with the prospects, recommendations for the future of this technology.

A second phase of both of the above reports will follow, aiming to study how to best co-ordinate and drive the recommendations of these documents for the benefit of the members.

Composite LP Gas Cylinders - Facts & Guidelines

This report brings in one single document, all the expertise and experience of the WLPGA members, manufacturers and LP Gas distributors involved with composite LP Gas cylinders. It describes the current LP Gas composite cylinder technologies, the manufacturers, specific characteristics of each cylinder type and in particular the aspects that distinguish them from traditional steel cylinders. The report describes also how these cylinders are operated, providing guidance and examples of good practices during transport, filling, inspection and also handling and use by the customer.



Mauricio Jarovsky
Business Development Manager, Ultragas

"It is clear that we will have more than enough LP Gas for the coming years. The challenge is to have enough good and competitive applications and processes to use it. We must be creative and GLOTEC is a key instrument in our efforts."

Exceptional Energy in Action – The LP Gas Applications Directory

The flagship GLOTEC project - **Exceptional Energy in Action – The LP Gas Applications Directory** - is steadily progressing. Significant resources are required to keep this key project on track to become the largest and most complete LP Gas applications web based directory in the industry. The project needs active support from all members to achieve its goals, to stimulate the spread of new LP Gas applications technologies, and promote the use and knowledge of LP Gas and its applications to a broader audience.



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Good Industry Practices

The WLPGA publish two core documents that are designed to encourage good industry practices across the LP Gas industry: *Guidelines for Good Business Practices* and *Guidelines for Good Safety Practices*.



Herbert Ngwenya
Chairman - The Liquefied Petroleum Gas Safety Association of Southern Africa (LPGSASA)

“Having the WLPGA run a good industry practice workshop was a very useful addition to our conference this year. It allowed our members to focus on some of the issues that threaten the safe and sustainable development of the LP Gas business in South Africa, especially as we anticipate significant growth in domestic use of LP Gas.”

The key aims of the guidelines, which have been translated into several languages, are to:

- Furnish the global LP Gas industry participants with a tool to ensure the marketplace, and the customer above all, are not compromised by industry players who carry out ‘bad practices’
- Enlist the support of government in establishing and enforcing policies and regulations that create a safe, equitable, and competitive environment for industry participants, so those who rely on LP Gas for their basic needs are not denied access

These voluntary guidelines are for LP Gas companies and associations to apply where no or weak regulations exist. They can also serve as an operating framework where laws and regulations do exist but are weakly, arbitrarily, or inequitably enforced. Both documents are freely available on the WLPGA website (www.worldlpgas.com).

During the year the WLPGA published several **Good Practice Guides** that focus on specific high risk areas of the industry. These included Guides on **Cylinder Management, Bulk Storage** and **Bulk Road Transport**. A Guide addressing the subject of running an LP Gas Association will be produced by the end of 2013.

Requests from members led to the introduction of a series of **Good Business Practices Workshops**. The WLPGA runs these workshops in countries where acute issues need to be addressed and the workshops aim to identify common business practices that pose a challenge to the safe and sustainable development of the LP Gas business in that country.

A typical workshop will:

- Assemble key stakeholders from the LP Gas industry in a country or region to discuss business practices
- Identify and share business practices in a country where action must be taken
- Secure common agreement from all key stakeholders to address these issues
- Develop an action plan and timetable to implement improvements

In 2013 the WLPGA conducted workshops in Vietnam and South Africa. More are planned next year. Over sixty delegates attended the Vietnam workshop in Ho Chi Minh City which focused on LP Gas cylinder management and was supported by a WLPGA in-country member, Petro Vietnam Gas. A similar number attended the workshop in Johannesburg, which also focused on LP Gas cylinder management, where delegates debated the challenges being faced by the industry by bad practices.



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The Hazardous and Noxious Substances Convention (HNS)



David Tyler (left) and Makoto Arahata (right) at the HNS meetings in London

Having secured observer status in October 2012 for a further three years with the governing bodies of the **International Oil Pollution Compensation Funds (IOPCF)**, the WLPGA continued to represent the LP Gas industry in discussions on the impending **2010 Hazardous and Noxious Substances Convention (HNS)** (www.hnsconvention.org).

The WLPGA is represented at meetings at the **International Maritime Organisation (IMO)** in London by **David Tyler, Director** and **Makoto Arahata, Overseas Business Manager** of the **Japan LP Gas Association**.

When it comes into force, the 2010 HNS Convention, administered by the IOPCF will have an impact on the whole LP Gas industry. It will establish a comprehensive regime covering pollution damage from hazardous and noxious substances carried by ships - including LP Gas - as well as the risks of fire and explosion, including loss of life, personal injury, and loss of or damage to property.

So far eight states have signed, subject to ratification of the Convention; Canada, Denmark, France, Germany, Greece, the Netherlands, Norway and Turkey. Other countries are actively working towards ratification.

The IOPCF welcomes the involvement of the WLPGA in discussions leading to the enactment of the HNS Convention which also protects the interests of our members and the involvement of the WLPGA at the IOPCF meetings is critical to the LP Gas industry and remains a key objective of the Association.

"... the 2010 HNS Convention will protect participating States from the consequences of a major catastrophe involving LP Gas. If States choose not to participate the onus will be on State (tax payers in that country) to fund any compensation claims. The WLPGA is working closely with our own members, the IOPCF secretariat and the participating delegates at the IOPCF meetings to ensure our industry is well engaged in the process of enactment of the Convention..."

David Tyler
Director, WLPGA

"... when it comes into force every country that has ratified the 2010 HNS Convention will be protected from a serious incident involving LP Gas. The entities which are obliged to report the quantity of LP Gas are receivers in the countries which ratify the 2010 HNS Convention. The reports must be made through their governments. Countries that do not sign up to the Convention will put themselves at risk in the event of a serious incident..."

Makoto Arahata
Overseas Business Manager, Japan LP Gas Association

Even before the 2010 HNS Convention enters into force, once they ratify the Convention, States are obliged to report the total quantities of sea borne LP Gas received in that State in the calendar year.



Photograph courtesy of Petredec



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Global Technology Conference (GTC) and the WLPGA Innovation Awards

Identifying new technology is one of the key points of the WLPGA Mission Statement. The GTC features some of the newest LP Gas technology around the world. The 2013 GTC was held in London in October 2013 as part of the World Forum and attended by over 300 delegates, a record-breaking attendance.



GTC London 2013

Each year representatives from the industry are invited to submit abstracts describing some of their most innovative pieces of technology. Submissions this year included topics from the whole downstream distribution chain from well-head to consumer. An independent steering

committee selected the ten best submissions against a number of criteria including technical innovation, improvement in safety, commercial potential, new market segment, improvement or optimisation of operations and image enhancement. The ten selected papers were showcased at the GTC.

“... I thought GTC this year was the best ever... the papers were relevant and very well presented making for an excellent overview...”

Leandro Del Corona

Director of Marketing, Ultragas, Brazil



Mr James Rockall (centre) presents the awards to **Mr Onur Azak** (left) and **Mr Kotaro Ono** (right)

The **WLPGA Innovation Awards** are given to the two outstanding papers presented at GTC and selected from the papers presented the previous year. The winner and runner up are selected by the WLPGA GTC steering committee.

The runner-up was Aygaz, Turkey. Aygaz was selected for its development of a “Camping Gas Cylinder Recognition System”. James Rockall presented the Award to Mr Onur Azak from the Aygaz Research and Development Department.

The winner for 2013 was ENEOS Globe, based in Tokyo, Japan. ENEOS GLOBE was selected for its development of “Integrated Electricity Generation System optimised by Fuel Cell (ENE-FARM)”.

The paper showed how a fuel cell operating with LP Gas and renewable energy can increase opportunities for LP Gas use and contribute to creating a sustainable society with lower emissions.

James Rockall presented the Award to Mr Kotaro Ono, Executive Officer and General Manager, Market Development Dept., ENEOS GLOBE Corporation, Tokyo, Japan during the World Forum in London and the winner also receives a complimentary pass for the 2014 Forum.



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2013 Events Overview

January 15 - 17	Abu Dhabi, UAE: World Future Energy Summit
February 4 - 5	Yangon, Myanmar: Myanmar Oil & Gas Summit 2013
February 26 - 27	Tokyo, Japan: WLPGA Board, Industry Council & Network Meetings (GAIN, GLOTEC, GCN)
February 28	Tokyo, Japan: Japan International LPG Seminar
March 6 - 7	Warsaw, Poland: Exceptional Energy for Poland: International LPG Conference
March 6 - 8	Mexico City, Mexico: AIGLP Annual Ibero-American LPG Congress
March 17 - 20	Houston, USA: Purvin & Gertz 26th International LPG Seminar
March 18 - 22	Phnom Phen, Cambodia: Clean Cooking Forum 2013
March 28 - 31	Istanbul, Turkey: Gas Turkey
March 16 - 18	Shanghai, China: 19th China LPG Conference 2013
April 13 - 15	Atlanta, USA: Southeastern Convention & Expo
April 17 - 19	Moscow, Russia: Argus 8th International LPG Conference
April 22 - 26	London, UK: HNS Convention Meetings
June 4 - 5	New York, USA: WLPGA Internal Working Group Meetings, Board & Industry Council
June 18 - 19	Washington DC, USA: Propane Days
July 3	Ho Chi Minh City, Vietnam, WLPGA Good Industry Practice Workshop
July 4 - 5	Ho Chi Minh City, Vietnam: Asian LP Gas Summit
July	London, UK: HNS Convention Meetings
September 30	London, UK: WLPGA Board and Council Meetings
October 1 - 3	London, UK: 26th World LP Gas Forum & 2013 AEGPL Congress incorporating UKLPG Annual Conference
October 21 - 24	London, UK: HNS Convention Meetings
October 13 - 17	Daegu, Korea: 22nd World Energy Congress
November 16	South Africa: WLPGA Good Industry Practice workshop
November 17 - 18	South Africa: LPGSASA Annual Conference
November 18 - 20	Rio de Janeiro, Brazil: IHS Latin America LPG Summit
November	Warsaw, Poland: COP

Publications

WLPGA produces a variety of publications, from reports freely available on the WLPGA website to dedicated network reports available to members only. In 2013 a wealth of publications were produced.

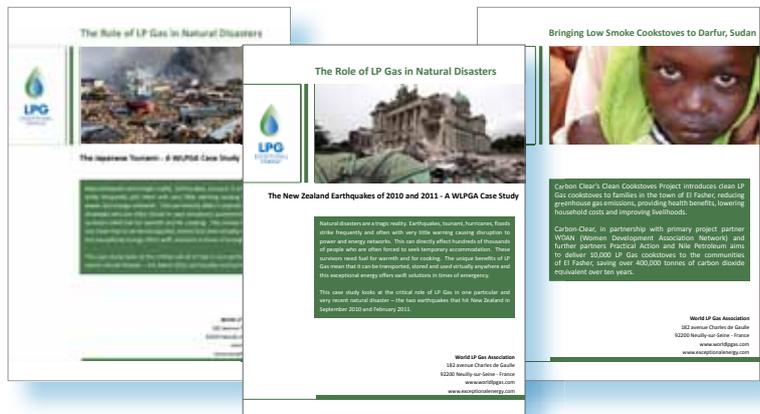
Cooking For Life Studies

In support of the Cooking For Life campaign two dedicated reports were produced focusing on deforestation and socioeconomic benefits of switching to cooking with LP Gas.



Exceptional Energy Case Studies

WLPGA continues to add to the Exceptional Energy case study library with success stories. A focus on this year's contributions has been on the value of LP Gas as a life saving fuel in times of natural disaster.



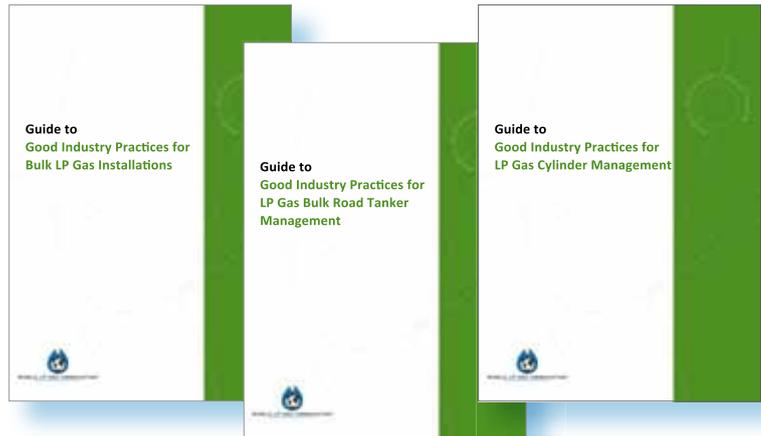
GLOTEC Reports

Three brand new reports have been produced this year by the GLOTEC team. These reports are available to WLPGA members only.



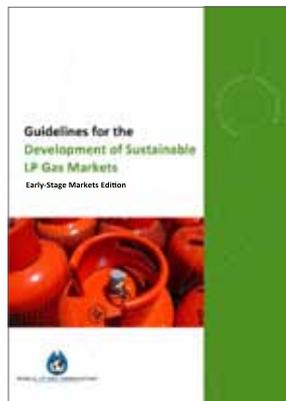
Good Industry Practices Guidelines

Three brand new guidelines in the Good Industry Practices suite of reports. These documents are freely available from the WLPGA website.



GCN Good Industry Practices Guidelines

Produced by the GCN Network this document addresses the development of early stage LP Gas markets and is freely available from the WLPGA website.



Statistical Review of Global LP Gas 2013

This publication offers aggregated non-commercial statistics from the global LP Gas market, including over 100 countries and covering topics such as production, availability and consumption of LP Gas as well as statistics on specific sectors such as Autogas and domestic use. The report is available free to WLPGA members.

WLPGA Newsletters

WLPGA produces a suite of regular newsletters ranging from The Voice, a monthly communication sent to a worldwide database, to a newsletter dedicated to the World Forum and a new initiative – WLPGA Insider – a newsletter for members only.





World LP Gas Forum 2013

The WLPGA and AEGPL co-hosted the 26th World LP Gas Forum & 2013 AEGPL Congress under the theme of 'LP Gas: Making a World of Difference'



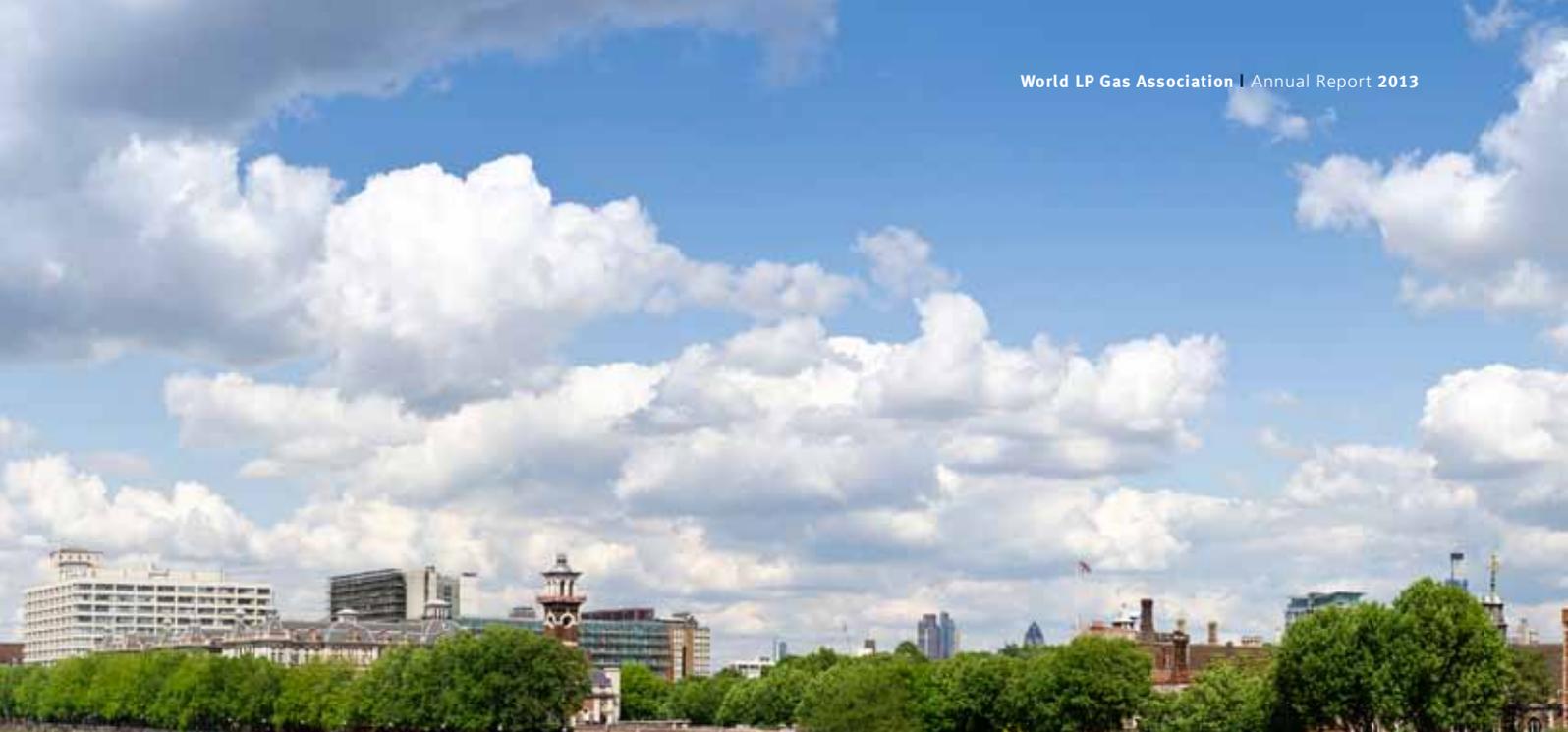
The event also incorporated the UKLPG annual conference providing not only unparalleled networking opportunities, a stellar speaker lineup of international dignitaries and industry leaders but also a major global exhibition.

HRH The Princess Royal opened the event and keynote speakers included the RT Hon The Lord Deben, Chairman of the UK Government's Committee on Climate Change, Dr Kandeh Yumkella, the Director General of the United Nations initiative on Sustainable Energy for All (SE4ALL). In another major step for the WLPGA, Dr Yumkella and WLPGA President, Kimball Chen signed a letter of intent to cooperate between SE4ALL and WLPGA.

The event incorporated a number of varied sessions including The Global Technology Conference focusing on Operations and Applications in the LP Gas technology, and sessions addressing UK markets, the impact of LP Gas on a worldwide scale, Autogas, an Upstream and Downstream session, an Africa Focus session and a session dedicated to how LP Gas is used in extreme circumstances.

The 27th World LP Gas Forum & 29th AIGLP Congress will take place in Miami, United States 28-30 October 2014. This event promises to be the largest ever combining the North American and Latin American LP Gas markets.





“The selection of London as the Forum venue this year took into account the extraordinary advantages of this most historic and majestic of cities. Not only is it a highly popular tourist destination, but it is a premier meeting point for the whole world commercially, politically and financially. It is appropriate that the homeland of the industrial revolution hosts our LP Gas industry, in this time of a revolution in the gas industry worldwide.”

Kimball Chen

WLPGA President in his welcoming message



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WLPGA Organisation

Board of Directors

The WLPGA team is supported and assisted by the Board of Directors and the Industry Council. This ensures that members are fully represented in the activities and strategies of the Association whilst also ensuring that the WLPGA can truly speak as a unified and coherent voice of the industry.

The WLPGA Board is composed of a President, a First Vice-President, a Treasurer, three Vice Presidents and three other Board Members. The current Board was elected at the Annual General Assembly of 30th September 2013 in London, UK. The Board composition is representative of the business activities and geographic diversity of members.

The Board meets three times a year to agree the budget and approve the accounts for ratification by the General Assembly. The Board has an overall governance role for the Association as defined under French law.

President

Kimball CHEN

Chairman,
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Treasurer

Lon GREENBERG

Chairman of the Board,
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First Vice-President

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Board Member

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Board Member

Leo H. JUNG

CEO,
SK Gas, (South Korea)
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Industry Council

The Industry Council was inaugurated in 1996 and is composed of leading companies in the LP Gas business. The Industry Council directs the Association's actions by identifying issues, developing strategies, and formulating projects. The Council also makes recommendations to the WLPGA Board of Directors.

Actions launched by the Industry Council aim at enhancing the positive image of LP Gas worldwide and promoting LP Gas use to satisfy the growing need for an all-purpose, efficient and environmentally friendly fuel. Whether focused on specific market segments or the LP Gas industry in general, the Industry Council's actions are designed to increase the worldwide use of LP Gas.

In 2013 the Industry Council was joined by Hindustan Petroleum, Oando and Oryx.



The WLPGA Team



From left to right:

Alison Abbott

Marketing and Communications Director

Rita Pecilunas

Event Sales Manager

Nikos Xydias

Technical Director

Esther Assous

Events Director

Laurence Poret

Office Manager
and Member Relations Manager

Camille Pieron

Communications Coordinator

James Rockall

CEO and Managing Director

Alexander Stöhr

Autogas Manager

David Tyler

Director Projects and Business Practices

Debbie Tyler

Michael Kelly

Director Market Development
and Deputy Managing Director

27th WORLD LP GAS FORUM & 29th AIGLP CONGRESS

CONFERENCE & EXHIBITION

28th-30th OCTOBER 2014

INTERCONTINENTAL HOTEL MIAMI



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Associação Iberoamericana
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