



World LPG Association

Annual Report 2014



For a cleaner, healthier and more prosperous world



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2014 in Brief

Goals

In 2014 the WLPGA's activities were aimed at:

- Demonstrating the benefits of LPG and informing, educating and influencing a variety of stakeholders.
- Supporting the development of LPG 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 major WLPGA campaign that aims to convert one billion people from cooking with traditional fuels to cooking with LPG by 2030. The campaign took major steps forward during 2014 with the completion of the Roadmap To A Billion, the launch of a revamped campaign website, release of key studies and an inaugural Cooking For Life Summit.

Exceptional Energy

The global rollout of the Exceptional Energy brand continues to remain a major initiative for the WLPGA. 2014 saw a wealth of new success stories, an increasingly successful social media presence, and the kick-off of a revamp for the brand which will come to fruition in 2015. All members were invited to take part in a survey to submit their comments on the future of their brand.

GLOTEC

The GLOTEC network supports industry growth through the promotion of new technologies and innovation. During 2014, GLOTEC produced new communications including a dedicated newsletter, GLOTEC News, and, most importantly, launched Exceptional Energy in Action – the LPG Applications Database Website (www.lpg-apps.org).

GCN

The GCN is a network dedicated to sharing 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 2014, GCN completed the Guidelines for the Development of Sustainable LPG Markets for transitioning stage markets.

GAIN

Promoting Autogas remains a core mission for the WLPGA and GAIN is the only worldwide network that represents Autogas on a global scale via lobbying, developing contacts with OEM and Autogas equipment manufacturers and a strategic communications plan. 2014 saw the launch of a dedicated Autogas website www.auto-gas.net.

World LPG Forum

The 27th World LPG Forum took place in Miami under the theme of 'The Future Starts Now'. This year's event was co-hosted with the 29th AIGLP Congress and welcomed around 2,000 participants from 88 countries. With a packed conference and sold-out exhibition this year's Forum proved an unprecedented success.

Heating

LPG is the perfect heating fuel for off-grid homes combining flexibility, availability and low emissions.





Kimball Chen
President, WLPGA

Foreword from the President

Dear Members and Friends of the World LPG Association,

This Foreword to the 2014 Annual Report is unusual in that it emphasises both good and bad news.

The good news is that, on a global basis, the prospects for growth in all segments of our LPG industry have never been greater. The world's policy makers are beginning to understand the key role that LPG can and must play in developing countries. In developing and developed countries alike, the use of Autogas has never had stronger potential, especially as urban areas focus on improving air quality.

The positive trend in supply and price factors is also good news. The rapid growth in LPG supply as a consequence of increasing US unconventional oil and gas production and the development of new gas fields globally has increased supply availability for LPG markets everywhere. Despite the substantial drop in the price of crude oil, the current OPEC policy of maintaining oil production levels also contributes to prospects of more than adequate physical supply and moderate prices for oil-related products such as LPG.

The bad news is that the vigorous debate in every country about energy choices often, unfortunately, is distorted by inaccurate information or false statements about the cleanest fossil fuel, gas. Concerted communication efforts by the LPG industry at regional, national and international levels must increase. The message that the world must come to understand is that, in coming decades, the role of gas will be key in serving global energy needs while mankind slowly achieves a technically and economically viable route to sustainable, renewable, green energy.

The WLPGA flourished in 2014, both in terms of organic growth of membership and in scope of accomplishment for the good of the Members and for the general public whom Members serve. WLPGA membership comprises leading companies operating in over 125 countries, representing more than 80% of the world population. The ranks of our Observer Members grew in number and weight, as organisations such as the Global Alliance for Clean Cookstoves and others chose to coordinate their goals closely with the WLPGA.

The UN has proclaimed 2014-2024 as the Decade of Sustainable Energy for All ("SE4All"). The belated recognition that energy is fundamental for economic and social development, not incidental to it, has energised governments, civil society, industry and investors, across the globe. Significantly, many decision-makers now recognise the vital role LPG plays in providing low capital cost, fast to develop, efficient, affordable energy supply. Now is the time for us to assert LPG's rightful place and market share in the future of the world.

In this third year as President, I must thank all WLPGA Members and Friends for supporting the continued work of the WLPGA and also my colleagues on the WLPGA Board of Directors and Industry Council for their continued dedication to industry matters.

I conclude this Foreword by extending, on behalf of the WLPGA Members, thanks and appreciation to the extraordinarily capable, hard-working WLPGA staff, headed by the Managing Director and CEO Mr. James Rockall and his Deputy, Mr. Michael Kelly. Without their efforts, and those of their colleagues, the LPG industry would be less than what it is today.

Warm regards,
Kimball Chen



Cooking

LPG is used as a cooking fuel across the globe. Switching from solid fuels to LPG can dramatically improve indoor air quality and potentially save millions of lives.



James Rockall
CEO and Managing Director, WLPGA

Managing Director's Report

The Future Starts Now! This was the theme of our annual World LPG Forum, held in 2014 in Miami, Florida. It is a theme that is particularly relevant to the LPG industry since many of the future energy challenges the world faces, such as climate change, air pollution, energy efficiency or energy poverty can be met now with a switch to LPG. Consider energy poverty: three billion people, or 40% of the planet, lack access to clean cooking or heating solutions. As world leaders begin to recognise the huge health and economic burden this lack of energy access presents, the LPG industry has already begun to mobilise to meet the challenge. Spearheaded by WLPGA's "Cooking For Life" initiative; the WLPGA aims to facilitate the switch of one billion people to LPG by 2030 - something that if achieved will not just avoid a million premature deaths each year, but will open up new markets for the industry in areas where changing demographics and economic development present unique opportunities.

And the world of LPG is indeed changing. 2014 marked the year that the USA became the top LPG importer to Japan while at the same time Saudi LPG imports into Japan reduced to zero for the first time in over 50 years. With the continued emphasis on LPG exports, the shipping industry saw record highs for VLGC spot rates in 2014. Trading, shipping and the dynamics of the petro-chemical industry will continue to occupy our thoughts as we move into 2015 and as we host the 28th World LPG Forum late in 2015 in Singapore.

During 2014 WLPGA has been very active representing our industry and developing opportunities for our members. One area of interesting potential cooperation is with the International Gas Union with whom WLPGA signed an important cooperation agreement. Leveraging the influence of IGU, WLPGA can better represent the case for LPG as the off-grid gas solution, while our members now have access to the IGU network and the opportunities that it can bring.

Our membership grew by a record 25 organisations in 2014 - a clear indicator of the importance and value of the WLPGA to the LPG sector. Yet still we have room to grow. If you are a stakeholder in the LPG business and not yet a member of WLPGA, then join now.

"We are the unique, global voice of the industry; increasingly influential and effective. Join us, support us and work with us. Together we will demonstrate that with LPG, the Future Starts Now."



Industry

LPG supports a wide range of industrial processes and services, notably where a high degree of precision and flexibility in process temperatures, as well as a strong flame, are required.

About the Industry

What is LPG?

Liquefied Petroleum Gas (LPG) is a portable, clean and efficient energy source which is readily available to consumers around the world. LPG 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**.

LPG 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. LPG 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.

LPG, as a clean-burning, sustainable, efficient, portable, accessible and convenient fuel, plays a **pivotal role** in the transition towards a more secure, **sustainable and competitive energy world**.

Where is it used?

LPG has now over 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 LPG with almost 45% of the global demand for LPG coming from residential cooking and heating demands.

Overall global Autogas demand reached 25.8 million tonnes in 2013, **5.3% higher than in 2012** and represents almost 10% of total LPG consumption worldwide (2013 data). **Autogas is well established** in many countries in the world that have enabling legislation.

Leading Markets

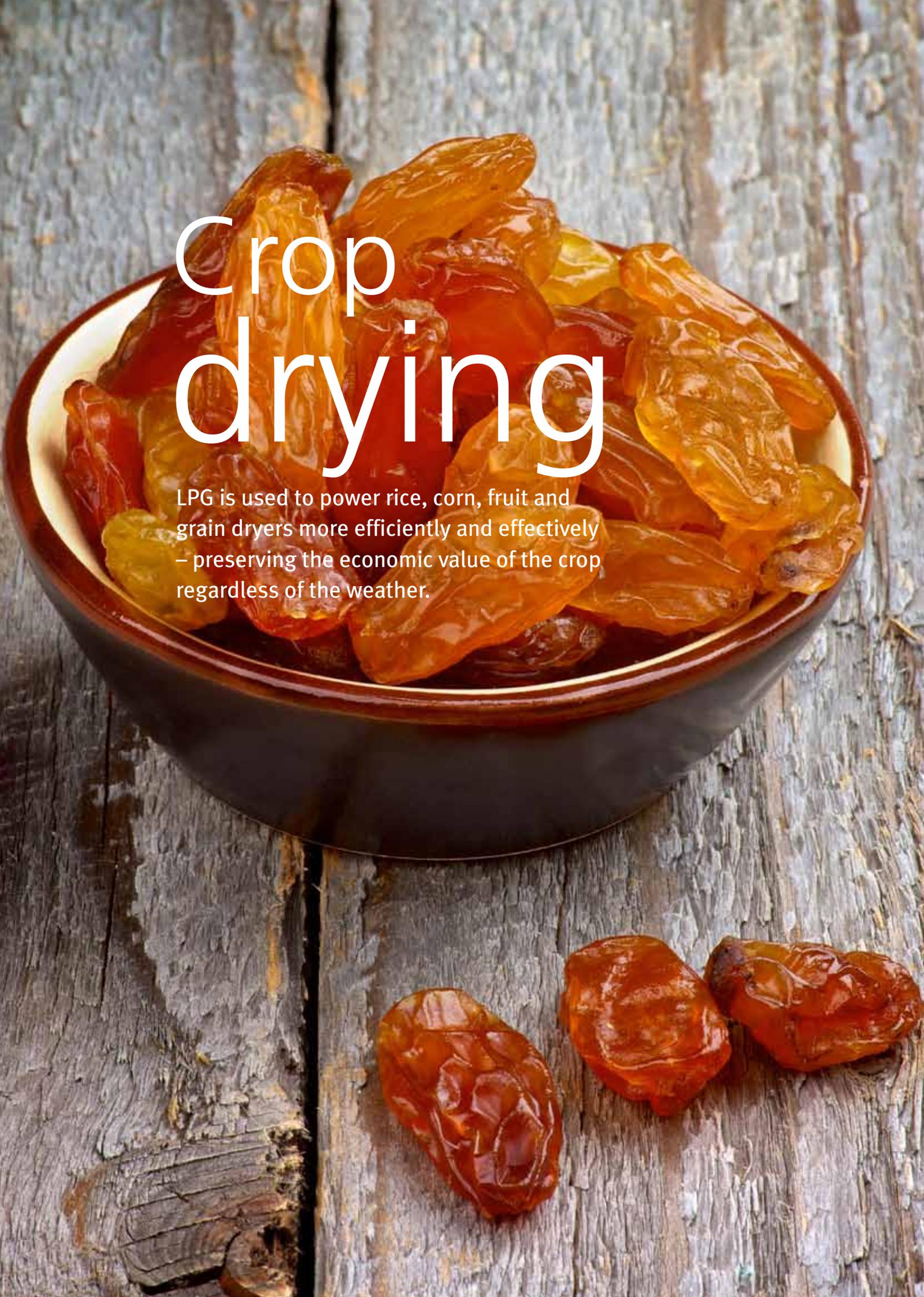
In 2013 global LPG production reached a record high of 280 million tonnes, with the **North America region growing 8.6%**.

The global LPG market is expected to increase substantially in the next decade as LPG supplies continue to grow feeding the expanding markets of Asia-Pacific and Africa.

Value of LPG

- ▶ The LPG industry gives work to over two million people around the globe, while approximately three billion people use LPG.
- ▶ LPG has a higher efficiency than natural gas-fuelled distributed power generation, which makes it ideal for rural homes and businesses.
- ▶ There are now nearly 25 million Autogas vehicles in use around the world.

The latest data on the LPG market is available in the WLPGA Statistical Review of Global LPG 2014, which is available at no charge to WLPGA members.

A photograph of a dark brown ceramic bowl filled with dried, wrinkled tomatoes. The bowl sits on a rustic, weathered wooden surface. The tomatoes are a mix of orange and red hues. The text 'Crop drying' is overlaid in white on the bowl. Below the bowl, three more dried tomatoes are scattered on the wooden surface.

Crop drying

LPG is used to power rice, corn, fruit and grain dryers more efficiently and effectively – preserving the economic value of the crop regardless of the weather.

About the WLPGA

Vision & Mission

The WLPGA is the authoritative voice of the global LPG industry representing the full LPG value chain. The primary aim of the association is to add value to the sector through driving premium demand for LPG, 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.

The World LPG Association Vision

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

The World LPG Association Mission

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



“At Flogas we are very positive about the outlook for LPG, and are looking to grow and develop the Flogas Group. By joining the WLPGA, and becoming a member of the Council, we can get behind the challenges of promoting LPG as an incredibly versatile and relatively clean fuel. Indeed, as oil majors pull back from downstream LPG marketing, Flogas believes it has a responsibility to contribute where it can to the WLPGA’s active agenda. Furthermore, by participating at the London, Cartagena and Miami conferences, we have learned a great deal about best practices in other regions which we look to bring back to our own business. All in all, the WLPGA brings great value to our industry, but as ever it’s about what we put in, as well as what the team at the WLPGA do so well themselves.”

Henry Cubbon
Managing Director, Flogas Group

“The LPG industry, facing a paradigm shift driven by a rapid changes in supply dynamics, is eager to find new applications under the concept of energy welfare. WLPGA is at the center of connecting and sharing those ideas from gurus of LPG industry across the world.”

Jae Hoon Lee
COO, SK Gas



Benefits to Members

The WLPGA is the global voice for the LPG industry, uniting the broad interests of the worldwide LPG 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 LPG 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 LPG 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 LPG 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 LPG 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 LPG community with a valuable platform to share its

local experiences, technological developments and innovative solutions.

Annual World LPG Forum

The annual World LPG Forum has become the most important event in the calendar for the LPG industry, attracting hundreds of exhibitors, and thousands of delegates each year. The event, attended every year by top executives of the LPG industry from all around the world, gives WLPGA members an excellent opportunity to meet “everyone you need to know” in the LPG 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 LPG. The WLPGA offers its members an opportunity to exchange views on the upstream and downstream parts of the LPG 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.

The Exceptional Energy website and toolkit will benefit from a significant upgrade during 2015.

■ Cooking For Life Toolkit

To support the 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, Forum Voice and Autogas Updates newsletters are sent industry-wide and members benefit from dedicated newsletters such as Insider and GLOTEC News.

■ Global LPG Statistics

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

■ Publications

Members receive one free copy of all new publications. Publications such as the annual WLPGA Statistical Review of Global LPG 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.



"The LPG energy market is in a period of transformation, with access to significant new volumes and recognition of the importance of clean energy solutions creating new opportunities. Our association with the WLPGA has helped us to gain valuable insights into the market and introductions to prospective new market participants, which is of great value in realising the potential of the LPG export market."

Nicholas Gleeson
CEO, BW LPG



"Petredec is committed to the LPG industry. As the industry's leading trader, and owner/charterer of one of the world's largest LPG dedicated shipping fleets, we have recently diversified our business with the acquisition and development of a number of LPG import terminals within the Indian Ocean region, which will go to form the backbone of LPG supply and distribution into regional emerging markets. As a member of the WLPGA we can leverage a rich pool of LPG based knowledge resources proving invaluable in market entry business planning and the ongoing development of existing markets."

Giles Fearn
CEO, Petredec

■ Workshops & Training Courses

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

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 LPG 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 LPG 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 LPG industry can join. There are various categories of membership available to interested organisations.



Contact: **Laurence Poret**
Member Relations Manager
lporet@wlpga.org

A close-up photograph of a person's hand holding wooden chopsticks, stirring a pot of green soup. The pot is on a portable gas stove with a metal stand, set on a wooden table outdoors. The background is a lush green forest.

Outdoor cooking

LPG is the fuel of choice for outdoor cooking. Whether used for barbeques, in caravans or in small containers on remote hikes, LPG provides safe, controllable heat for outdoor cooking.

Membership 2014

WLPGA has a global membership base of over 200 members in more than 125 countries.

The following are WLPGA Members during 2014.

Africa

Afriquiagaz, [Morocco](#)
Afrox, [South Africa](#)
Allied East Africa LTD, [Kenya](#)
Caisse de Stabilisation des Prix des Hydrocarbures, [Cameroon](#)
LP Gas Safety Association of Southern Africa (LPGSASA), [South Africa](#)
Naftal, [Algeria](#)
Nigeria LP Gas Association (NLPGA), [Nigeria](#)
Nigerian National Petroleum Corporation (NNPC), [Nigeria](#)
Nile Petroleum Company Ltd., [Sudan](#)
Oando Marketing Plc, [Nigeria](#)
PIEA - Petroleum Institute of East Africa, [Kenya](#)
Pilot International, [Uganda](#)
Premier Gas Company Limited, [Kenya](#)
Reatile Gas Pty Ltd, [South Africa](#)
Salam Gaz, [Morocco](#)
SNDP, [Tunisia](#)
Somas, [Morocco](#)
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](#)
BW LPG, [Singapore](#)
Clean Air Asia, [Philippines](#)
Cosmo Petroleum Gas Co Ltd, [Japan](#)

Dor Alon Gas Technologies Ltd., [Israel](#)
E.ON Masdar Integrated Carbon (EMIC), [United Arab Emirates](#)
E1 Corporation, [South Korea](#)
Elpiji (M) SDN. BHD, [Malaysia](#)
Emirates Gas LLC, [United Arab Emirates](#)
Eneos Globe Corporation, [Japan](#)
Energy Market Regulatory Authority, [Turkey](#)
Gasco Saudia Arabia, [Saudi Arabia](#)
Gas to Health Initiative, [Nigeria](#)
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](#)
Ipragaz A.S., [Turkey](#)
Isla LPG Corporation, [Philippines](#)
ITO Corporation, [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](#)
Laugfs Gas Plc, [Sri Lanka](#)
Litro Gas Lanka Limited, [Sri Lanka](#)
LP Gas Center, [Japan](#)
LPG Association of Pakistan, [Pakistan](#)
LPG Industry Association Inc., [Philippines](#)
Maldiv Gas Pvt Ltd, [Maldives](#)
Mauria Udyog Limited, [India](#)
Metal Mate, [Thailand](#)
National Gas Company - SAOG, [Oman](#)
New Cosmos Electric Co., Ltd., [Japan](#)
NewOcean Energy Holdings Limited, [Hong Kong SAR China](#)

Oil and Gas Regulatory Authority, [Pakistan](#)
Pazgas Ltd., [Israel](#)
Pertamina, [Indonesia](#)
Petredex Services (Asia) Ptd Ltd, [Singapore](#)
Petrofed - Petroleum Federation of India, [India](#)
Petronas, [Malaysia](#)
Petrovietnam Gas Trading Company, [Vietnam](#)
Rawafd International Co., [Saudi Arabia](#)
Rinnai Corporation, [Japan](#)
Saisan CO LTD, [Japan](#)
Saudi Aramco, [Saudi Arabia](#)
SCG (Thailand) Co Ltd, [Thailand](#)
Self Employed Women's Association (SEWA), [India](#)
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, [China](#)
Taiwan Research Institute, [China](#)
The Green Flame Gas Co., [Kuwait](#)
The Hong Kong & China Gas Co Ltd, [China](#)
Turkish 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

Aburi Limited, [United Kingdom](#)
 AEGPL, [Belgium](#)
 Amtrol-Alfa Metalomecanica, S.A., [Portugal](#)
 Antargaz, [France](#)
 Antonio Merloni Cylinders Ghergo Group S.P.A., [Italy](#)
 AOGPL - Asociacion Espanola de Operadores de Gases Licuados del Petróleo, [Spain](#)
 Argus Media Limited, [United Kingdom](#)
 Assogasliquidi Federchimica, [Italy](#)
 Athelia Solutions, [Spain](#)
 AvantiGas Ltd, [United Kingdom](#)
 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](#)
 Coral Gas S.A., [Greece](#)
 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](#)
 GERES, [France](#)
 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](#)
 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](#)
 POGP, [Poland](#)
 Practical Action, [United Kingdom](#)
 Primagaz, [France](#)
 Prins Autogassystemen B.V., [Netherlands](#)
 REEEP, [Austria](#)
 Repsol, [Spain](#)
 Rochester Gauges International, [Belgium](#)
 Sensile Technologies SA, [Switzerland](#)
 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., [Spain](#)
 Tyczka Trading & Supply GmbH & Co. KG, [Germany](#)
 UKLPG, [United Kingdom](#)
 Vopak, [Netherlands](#)
 World Alliance for Decentralized Energy (WADE), [United Kingdom](#)

North & South America

Abastible S.A., [Chile](#)
 AGREMGAS, [Colombia](#)
 AIGLP Asociacion Iberoamericana de Gas Licuado de Petróleo, [Brazil](#)
 AmeriGas Propane, [United States](#)
 Blackmer, [United States](#)
 Blossman Gas Inc, [United States](#)
 Camara Uruguaya de Gas Licuado, [Uruguay](#)
 Canadian Propane Association, [Canada](#)
 Central Gas Ventures, Inc., [United States](#)

Charbroil, LLC, [United States](#)
 Comisión de Regulación de Energía y Gas, [Colombia](#)
 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](#)
 Gas Gombel S.A. ESP (GASMAX), [Colombia](#)
 Gasco GLP S.A., [Chile](#)
 Gasnova - Unión de empresas colombianas de gas propano, [Colombia](#)
 GenteGas S.A., [Guatemala](#)
 Global Alliance For Clean Cookstoves, [United States](#)
 Grupo Zeta, [Mexico](#)
 IHS, [United States](#)
 Lehr Incorporated, [United States](#)
 Liquigas Distribuidora, [Brazil](#)
 Manchester Tank & Equipment, [United States](#)
 Mangels Industrial, [Brazil](#)
 NPGA (National Propane Gas Association), [United States](#)
 OPIS, [United States](#)
 Paraco Gas Corp., [United States](#)
 PERC - Propane Education & Research Council, [United States](#)
 Persistent Energy Partners LLC, [United States](#)
 Red Seal, [United States](#)
 RegO Products, [United States](#)
 Sindigas, [Brazil](#)
 Trinity Industries de Mexico, [Mexico](#)
 Trovan, [United States](#)
 UGI Corporation, [United States](#)
 Ultragaz, [Brazil](#)
 Unidad de Planificación Minero Energetica, [Colombia](#)
 Winrock International, [United States](#)
 Worthington Cylinder Corporation, [United States](#)

WLPGA Activity 2014

Communications and Exceptional Energy

WLPGA communications has a three-level approach focusing on communications to the global LPG community, internal communications to members, and the global roll-out of the brand Exceptional Energy.



The Exceptional Energy logo - a global brand with one unified and recognisable image.

Global LPG Community Communications

WLPGA produces a suite of communications for the worldwide LPG industry including the flagship monthly newsletter, *The Voice*, a growing library of topical case studies and dedicated awareness campaigns around specific and relevant activities. WLPGA also works directly with international press with the aim of ensuring that WLPGA is recognised as **the** go-to and credible source for any industry information. WLPGA manages five websites, the corporate association website (www.wlpga.org), Exceptional Energy (www.exceptionalenergy.com), the Cooking For Life campaign website (www.cooking-for-life.org), and two exciting new developments during

2014, the dedicated Autogas portal (www.auto-gas.net) and the LPG applications database (www.lpg-apps.org). All of these sites are publicly available and carry a huge amount of industry information.

Dedicated Member Communications

WLPGA members benefit from a series of communications including a regular newsletter updating on WLPGA member activities and newsletters or reports tailored to certain sectors of the industry. Members also have access to a dedicated portal with a wealth of data available to them.

COOKING FOR LIFE THE CHALLENGE THE CAMPAIGN MEDIA & RESOURCES CONNECT SEARCH

4.3 MILLION people die annually due to exposure to indoor air pollution, mainly caused by cooking with traditional fuels

SINCE MIDNIGHT (GMT), AN AVERAGE OF 05813

You can make a difference. Spread the word, tell your story or help people move away from polluting fuels.

GET INVOLVED @TAY #FORLIFE

Major WLPGA campaigns such as Cooking For Life are launched under the Exceptional Energy brand.

“Ultragaz is committed to the LPG industry and is a long-standing Industry Council member of the WLPGA. Also, as a Board Member myself, we see a great deal of value in being a member of this important association. Ultragaz fully supports the work that the WLPGA undertakes, both here in Brazil and across the world and, of course, we fully endorse the Exceptional Energy brand.”

Pedro Jorge
Managing Director, Ultragaz and WLPGA Board Member



Exceptional Energy

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 LPG amongst policymakers, consumers and industry stakeholders.

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, wherever they are in the world and whatever the industry sector. Members are encouraged to get creative and weave the brand into their own communications.

2014 saw the continuation of the global roll-out with an enhanced library of case studies, a strong social media campaign and work in the field directly with members and at international conferences to spread the word.

Exceptional Energy is the master brand under which all WLPGA's campaigns and events sit – **Cooking For Life, Exceptional Energy in Action** and events such as the regional summit **Exceptional Energy for the Andes** – to ensure the WLPGA communications have a consistent message.

For more information visit www.exceptionalenergy.com and expect a revamped site in 2015.

WLPGA thanks all members for their continued support in making Exceptional Energy a success.

Social Media

Get connected - follow us on Twitter at [@ExceptionalNRG](https://twitter.com/ExceptionalNRG) and [@wlpgacook4life](https://twitter.com/wlpgacook4life) or LIKE us on Facebook at Exceptional Energy. There's also a YouTube channel at www.youtube.com/user/WorldLPG



Contact: **Alison Abbott**
Marketing &
Communications Director
aabbott@wlpga.org

Focus on Major New LP Gas Facilities around the Globe

The LP Gas Terminal at Mer Rouge, Mauritius - A WLPGA Case Study

WLPGA member and Industry Council member Petredoc opened a new LP Gas terminal in Mauritius in March 2014.

The LP Gas Mounded Storage Import/Export Terminal facility and is the largest on-land LP Gas storage facility in the region.

Construction of the Mer Rouge terminal began in January 2012 and represents an investment of circa 42 million USD. From planning to commissioning the story of the terminal represents a successful combination of the latest technologies, and in-country cooperation. Much of the work went to local contractors and the terminal has been designed to industry best practice guidelines, ensuring a maximum level of security and product safety.

This case study looks at some of the highlights and challenges of the successful heavy lift operation of transporting the world's largest capacity LP Gas mounded storage pressure vessels from the fabricator to their final destination.

World LP Gas Association
182 Avenue Charles de Gaulle
92200 Neuilly-sur-Seine - France
www.worldlpg.com
www.exceptionalenergy.com

A library of case studies is available online.

EXCEPTIONAL TIMES REQUIRE EXCEPTIONAL ENERGY

If we are to battle climate change and have healthier living conditions we need cleaner and efficient energy sources and technologies. Now.

LPG is a clean, lower carbon, efficient and renewable energy source. LPG is immediately available anywhere and supports the use of renewable technologies.

World LP Gas Association
www.worldlpg.com

For more information, please visit:
www.exceptionalenergy.com

A comprehensive ready-to-use branding toolkit can be found at www.exceptionalenergy.com.

Cooking For Life

2014 was a big year for Cooking For Life, the WLPGA campaign which aims to facilitate the transition of one billion people from cooking with traditional fuels as well as other dirty and dangerous fuels to cleaner-burning LPG by 2030.



First, Cooking For Life launched a revamped, remodeled website (www.cooking-for-life.org) and upgraded social media presence (@wlpgacook4life) that has been effective in increasing the global visibility of the initiative and introducing it to a whole new audience of interested parties.

Second, acknowledging that the time horizon to 2030 is a difficult one to plan for, Cooking For Life unveiled a three year project plan for the time period between 2014 and 2016 which represents an important early phase of the initiative, during which the future evolution of the campaign will be defined.

**COOKING
FOR LIFE**

The 2014 – 2016 Cooking For Life project plan will focus on four main areas to achieve these goals:

- 1 - Identify the Opportunities
- 2 - Develop the Partnerships
- 3 - Build the Evidence Case
- 4 - Champion the Issue

"The Cooking For Life project aims to raise the awareness and understanding of the importance of clean cooking with LPG in developing areas of the world. I am encouraged by the progress this group has made in a relatively short time, particularly with the development of a roadmap with very clear steps to 2030. Our mission as a project group and as an industry is to instigate education and research projects that will aid the creation of favourable conditions for LPG cooking to grow within a sustainable market framework. Over the coming years, we will also ensure that clean cooking with LPG is on the agenda both in critical global organisations and within the countries where we can make the biggest difference."



Ken Wilson

WLPGA Vice-President and CEO, SHV Energy, the Netherlands

Next, to guide the initiative Cooking For Life announced that SHV Energy CEO, Ken Wilson, would become the Chairman of the recently formed Cooking For Life Steering Committee, the body responsible for setting priorities and ensuring that strategic objectives are adhered to.

In 2014 Cooking For Life also produced a number of key studies as part of its work programme. The most significant was the document entitled "Cooking with Gas: Why women in the developing world want LPG and what they can do to get it". This study was written by the Netherlands based NGO, Energia, which specialises in how access to energy impacts the lives of women in the developing world and was co-funded by the World Bank and the Center for Disease Control (CDC). The study provides



“Our largest competitor is firewood. Our adoption of the WLPGA’s Cooking For Life programme in Sri Lanka continues to help us convert dirty firewood stoves to clean, reliable and safe LPG cookers. The programme helps government, organisations and individuals realise the adverse health effects of cooking with biomass versus the benefits of using LPG which is an exceptional fuel.”

Hiran Senewiratne
Marketing Manager, Litro Gas - Sri Lanka

excellent in depth observations on the potential socioeconomic and health benefits to developing world women of conversion to LPG for cooking. It is a stark reminder of what a powerful force for good our product can be.

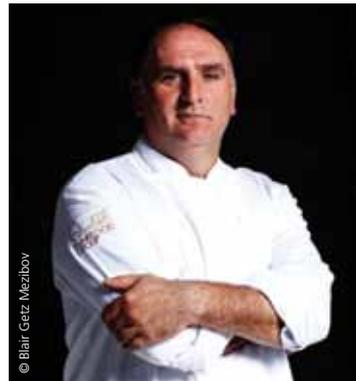
Cooking For Life also completed a study which examines the current and potential role of LPG in electricity demand-side management (DSM) programmes, with a particular focus on the advanced, industrialised countries demonstrating that LPG for cooking is not just for the developing world.

At the 2014 Forum in Miami, WLPGA signed a milestone agreement to cooperate with the US NGO World Central Kitchen which is run by celebrity chef and clean cooking activist José Andrés. In Miami, chef Andrés gave a powerfully emotional address about the work his organisation does in Haiti where deforestation is destroying the country and dooming another generation of Haitians. At one point he showed a picture of wood: “one day this will be the past,” he said. Then he showed a picture of a small LPG cylinder, the kind a poor family somewhere in the world might use. “And this will be the future,” he declared.

Finally WLPGA also held its first ever Cooking For Life Summit in Colombo, Sri Lanka. The November 17th event, which was held in conjunction with the Better Air Quality Asia (BAQ) biennial conference, brought delegates from over 30 countries and highlighted the work that Cooking For Life is doing with a particular focus on the potential for expanding its activities in the Indian sub-Continent.

SIDS

In 2014 WLPGA completed a study that looked at the benefits LPG can provide as an energy source for Small Island Developing States (SIDS). With their special energy needs, and unique geographical characteristics, SIDS have enormous potential to increase their use of LPG growing their markets and increasing the quality of life of their people.



Top: Chef and activist José Andrés.
Bottom: José Andrés and WLPGA President Kimball Chen sign a cooperation agreement during the Miami World Forum.



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The Global Cylinder Network (GCN)

In 2014 under the leadership of GCN Chairman Mr Abdelkader Benbekhaled from Salam Gaz in Morocco, the GCN continued to do important work in a key area of the LPG industry. Set up in 2011 to focus on sharing experience, expertise and best practices on how to manage and develop cylinder based markets, the fastest growing segment of the LPG industry in the developing world, the GCN has become the focal point for all issues regarding cylinders within the WLPGA.



"As the authoritative voice of the LPG industry, WLPGA produces work on issues central to the industry such as safety, good business practices and distribution models. These fundamental principles of the industry, representing years of experience and expertise, are the cornerstone of the values that all WLPGA members should strive to support. By incorporating the learnings from networks like the GCN into everyday operations, WLPGA members reinforce the strength of WLPGA, its myriad member companies and ultimately the global LPG community."

Mr Abdelkader Benbekhaled
GCN Chairman, Salam Gaz



In 2014 the GCN completed work on the second of two Guidelines for the Development of Sustainable LPG Markets. The first one completed in 2013 focused on early-stage markets or markets where LPG use per capita is low: below 10kg per capita per year, and typically around 2kg per capita per year. The second document focuses on transitioning-stage markets which have attained LPG consumption of around 15kg per capita per year, or are approaching that level, and aspire to develop successfully to the advanced stage over time.

These documents leverage the network of GCN experts to recommend optimal LPG distribution models for developing countries as well as the most efficient structures for encouraging long term growth, and managing and reinforcing distribution infrastructure in markets at various different levels of development.

GCN will continue to focus on diffusing innovation and expertise in order to enable WLPGA members in developing countries and beyond to learn from each other and increase the effectiveness of their national

communications and advocacy strategies in order to promote the safe, sustainable use of bottled LPG.



Contact: **Michael Kelly**
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“The Petroleum Institute of East Africa (PIEA) is the professional body for the oil and gas industry in the East Africa region. Through the WLPGA the PIEA has benefited by increasing the region’s industry representation on issues affecting the LPG business. PIEA has enhanced its objective of professionalism amongst LPG stakeholders in EA through running joint LPG training programs with WLPGA.

The WLPGA Network meetings and specifically the GCN have greatly complimented PIEA work in developing of standards and best practices as the GCN platform facilitates the sharing of latest standards and international best practices.”

Wanjiku Manyara

General Manager, Petroleum Institute of East Africa

Problems Related to Traditional Cooking Methods

- Health problems**
 - Respiratory infections
 - Pulmonary disease
 - Lung cancer
 - Malnutrition
 - Low birth weight
- Pollution**
- Deforestation**
- Soil erosion**
- Risky fuel wood collection**

Deaths per year

1 MILLION Malaria	1.8 MILLION HIV/AIDS	4.3 MILLION Pollution from Traditional Cooking
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3 Billion People
lack access to clean, modern cooking.

Positive Impacts of LPG Energy

LPG is a safe, clean and healthy cooking fuel.

- Healthy air
- Clean energy
- High quality cooking
- High efficiency

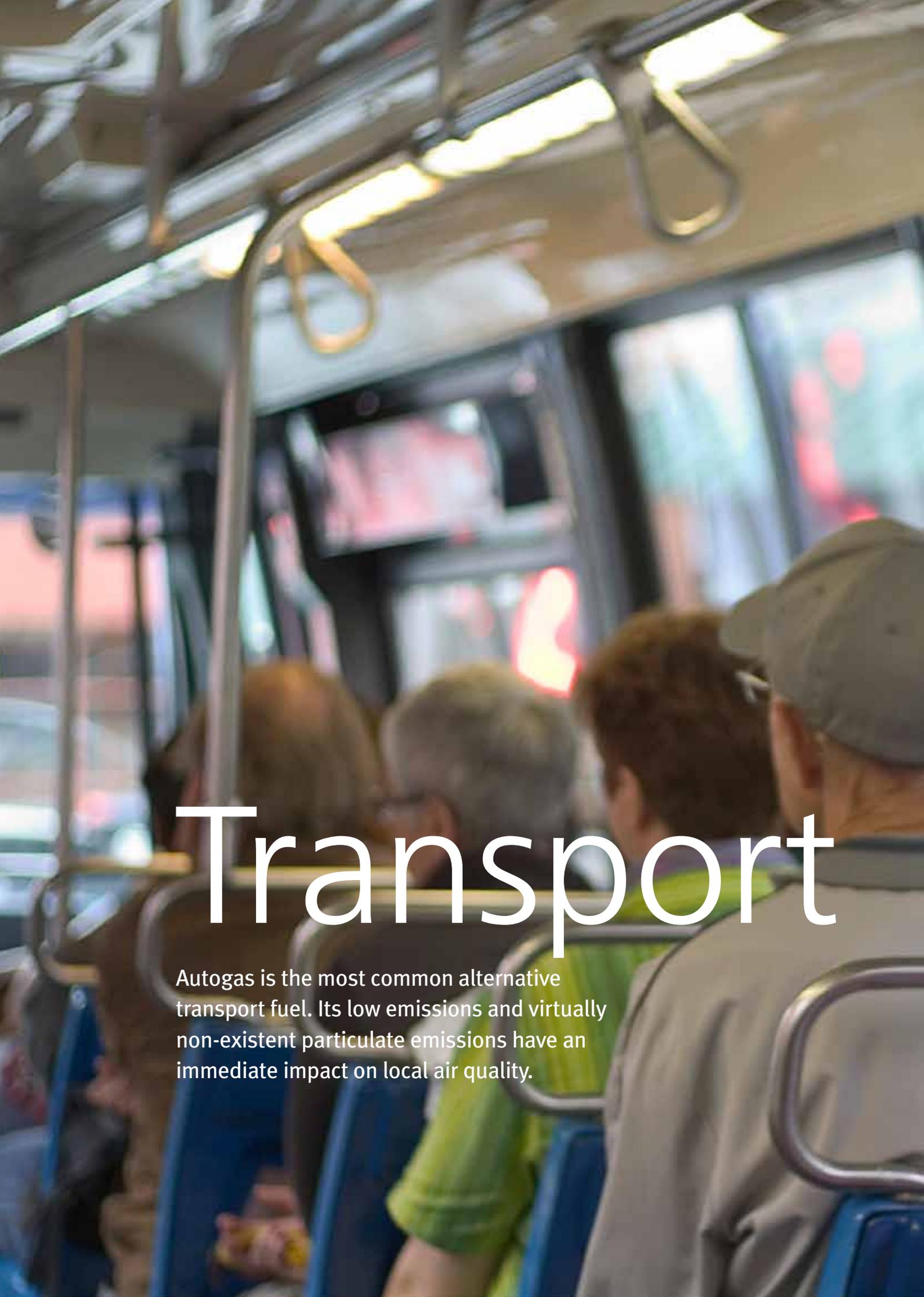
COOKING FOR LIFE PROGRAM

GOVERNMENT
PRIVATE SECTOR
COMMUNITIES

Large-scale adoption is possible

90% Brazil use LPG	40% Senegal use LPG (90% in Dakar)	45% India use LPG (88% in urban areas)	75% Indonesia use LPG
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www.exceptionalenergy.com

A photograph showing the interior of a bus. Several passengers are seated in blue seats, looking out the windows. The bus has overhead lighting and handrails. The scene is slightly blurred, suggesting motion.

Transport

Autogas is the most common alternative transport fuel. Its low emissions and virtually non-existent particulate emissions have an immediate impact on local air quality.

The Global Autogas Industry Network (GAIN)

Joining the forces of the WLPGA's members interested in the Autogas market, the Global Autogas Industry Network is the association's main vehicle to promoting Autogas around the world. Representatives from the large markets in the world including Europe, South Korea, Japan and Turkey share their knowledge and experience to assist each other in both lobbying activities especially their respective national governments and also in establishing and maintaining contacts with manufacturers in the automotive industry as well as communicating the benefits and Autogas success stories.



The flagship document, the Autogas Incentive Policies document, saw an extensive review during 2014 introducing new technology as well as the most recent developments from key Autogas markets. The document was finalised in time for the Miami World Forum and was presented to the members during the GAIN meeting in Miami. The Regional Autogas Summit held at the beginning of the year in Cartagena and the Global Autogas Summit both saw exceptional attendance numbers. Besides learning about novel projects of members with tier-1 automotive suppliers, the participants were also able to hear from satisfied professional customers who rely on Autogas as a clean and cost reducing alternative to fuel their fleets of service vehicles.

It has become clear from numerous conversations with the automotive industry that there is a need to produce a forward looking document focusing on the global Autogas market alongside the Autogas Incentive Policies. The Autogas Roadmap to 2040 could model a possible development of the global Autogas market showing total volumes of LPG available, highlighting future sources and the overall size it could potentially reach in order to attract the necessary interest of tier-1 suppliers to develop and manufacture dedicated systems based on the most modern technologies available. Members of GAIN are invited and encouraged to get involved with the creation and support of this essential tool for future work.



"Having assumed the role of Chairman of the Global Autogas Industry Network (GAIN) in June 2013 with great pleasure, I am delighted to coordinate this group's work in the WLPGA promoting the use of Autogas worldwide to foster a cleaner, healthier and more prosperous world."

Armando Viçoso
GAIN Chairman, Repsol



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Identification & Stimulation of Innovation

The Global Technology Network (GLOTEC)

In search of the new technologies that will guide future opportunities

2014 was a year of transition and consolidation for the GLOTEC network and also a year of reflection and exploration of new paths into the future during this first year under new chairmanship. The first network meeting of the year took place in Cartagena, Colombia and saw GLOTEC opening its activities to a much wider audience than usual meetings. The meeting attracted over than 200 participants from the region and successfully served to promote the network significantly beyond the membership of the association.



"2014 has been a year of transition for GLOTEC. Following the delivery of three substantial reports in 2013 we had to regroup and refocus our efforts and we have made real progress in doing this. We have always said that part of our mission should be to reach out to stakeholders outside our industry and we have now established a good relationship with the European Heat Pump Association to promote our gas heat pumps position within this industry. We also used our meeting in June to capture a broad opinion within the group about our future direction. We created a marine gas working group and proposals for projects which are now under consideration. Finally the much anticipated launch of our Exceptional Energy in Action website happened in Miami in October with an excellent feedback and we are very excited to have now this as a platform from which we can really promote the fantastic benefits of LPG applications."

Andrew Ford

GLOTEC Chairman, SHV Energy



Two of the GLOTEC reports from the previous year – covering Gas Heat Pump (GHPs) and Combined Heat and Power (CHP) - went into an implementation phase, with an initial focus on awareness and perception. Manufacturers of Gas Heat Pumps were contacted for exploration of common opportunities and networking activities were initiated in conjunction with the European Heat Pump Association (EHPA) and the European LPG Association (AEGPL) with plans in development for 2015.

A new GLOTEC network for LPG marine applications was created and the flagship project Exceptional Energy in Action – the LPG Applications Directory Website was completed and launched. The first issue of GLOTEC

News, a new quarterly publication focusing on communicating on all areas of the scope of GLOTEC was also produced this year.

The GLOTEC News

The first issue of GLOTEC News, GLOTEC's new quarterly newsletter for WLPGA members was released in May. GLOTEC News aims to inform on a range of subjects and to encourage sharing and member involvement in WLPGA initiatives. GLOTEC News promotes and accompanies the network's projects including technical and safety issues, standards, innovation and provides also a particular focus on LPG applications and related activities. It also covers operations and issues related to optimisation and operational excellence.

“The GLOTEC network provides a unique forum for discussion and identification of new technologies evolving around the world. With the launch of the LPG applications database, the most recent work of this network, our industry now has now in one place a comprehensive listing of how propane can be used around the world, and creates a platform for innovation in new products and refinements of existing ones. Propane is the fuel of the future for many reasons, and the applications we choose to change the lives of our users, whether for cooking, heat, hot water, or engine fuel must be superior in technology and representative of a fuel of the future. GLOTEC is the right forum to discuss, create innovation in design and applications, and provide education for the community of designers, manufacturers, and users.”



Tucker Perkins

Chief Business Development Officer, PERC



LPG Marine Applications

Following a high level of interest in this new area and looking at prospects for the future, a new working group for LPG Marine Applications was established. This working group aims to create awareness on the use of LPG for marine purposes, to unite LPG industry and related manufacturers to help grow the LPG marine segment, to influence and adapt local & regional legislation to accommodate and promote LPG as marine fuel and also serve as an expert focus group on this subject. This Marine Applications working group is chaired by Captain Bernardo Herzer of Lehr.

Exceptional Energy in Action – The LPG Applications Directory

The flagship GLOTEC project – Exceptional Energy in Action – the LPG Applications Directory Website – was launched during the World LPG Forum in Miami. Exceptional Energy in Action aims to become the largest and most complete LPG applications web based directory in the industry. It's goal is to stimulate the spread of new LPG applications technologies and promote the use and knowledge of LPG and its applications within the industry and beyond. This website will be continually developed and enhanced to serve as a knowledge base on everything there is to know about LPG applications.

Visit the online directory at
www.lpg-apps.org



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Brick manufacturing

In many countries, brick manufacturing is local and relatively small scale. LPG is the perfect fuel to produce high quality bricks in a sustainable way.

Good Industry Practices

The WLPGA have produced several Guides to Good Industry Practices for the LPG industry in recent years in support of the two WLPGA Guidelines - Good Business Practices and Good Safety Practices - which were published originally in 2005. These Guidelines are currently under revision for the second time. The first revision was in 2008.

“The Taiwan LPG industry is always keen to adopt new techniques to ensure our industry grows in a safe and sustainable manner. We were very pleased to host a WLPGA Good Industry Practices workshop recently and would recommend it to anyone thinking of addressing some of the challenging issues that sometimes occur in our industry.”



Henry H. Tsai, Sr.
Vice President, Sunrise LP Gas & Energy (Taiwan) Group

The guidelines to Good Industry Practices are designed to provide more prescriptive advice on specific areas of the LPG business where a need has been identified. Subjects for earlier guidelines include Bulk Road Transport, Bulk Storage and Cylinder Management. A guideline for LPG Associations was published in 2014. The next guideline being developed will focus on Government Policy.

It was agreed several years ago to introduce workshops to support the implementation of the messages in these documents wherever members decided there was a need. Workshops have been run in Peru, Bangladesh, the Philippines, Kenya, India, Myanmar, Indonesia, Timor Leste, Colombia, South Africa, Taiwan, Vietnam and Sri Lanka.

The review of the guidelines, and the development of the guidelines, are the product of a steering committee consisting of WLPGA members under the direction of David Tyler.

In 2014 five further workshops were conducted in Colombia, the Philippines, Taiwan and two in Myanmar. More workshops are planned in 2015.



Left: WLPGA Good Industry Practices workshops focus on the key issues that need addressing in the country and use case studies to highlight the remedial action required.



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The Hazardous and Noxious Substances Convention (HNS)



David Tyler and Mr Yuki Ihara, Deputy Secretary General of the Japan LPG Association.

David Tyler, Director, WLPGA, and Mr Yuki Ihara, Deputy Secretary General of the Japan LPG Association, (in photo) attended two meetings

of the Hazardous and Noxious Substances (HNS) Convention in London during the year, representing the WLPGA as an observer.

The meetings, held at the International Maritime Organisation (IMO) headquarters in May and October attracted over 100 delegates and addressed the latest position with regards ratification of the HNS Convention.

The WLPGA was also represented at a one day HNS workshop, organised by the Italian Interdepartmental

Committee on IOPC Funds, under the auspices of the Prime Minister's Office, in October 2014 in Rome.

The HNS Convention affects the global LPG industry and is not limited to the interests of one single nation. The WLPGA is the only body to truly represent this group and this also enables strong links between the WLPGA and the International Maritime Organization (IMO).

In 2015 the observer status to the IOPCF by the WLPGA will be reviewed.

Training



Over 60 participants attended the three day training course held at the Pertamina University in Jakarta in December 2014.

World LPG demand continues to grow, attracting tens of thousands of new personnel into the LPG industry each year. These personnel need to be continually trained in best practices in order that the LPG industry's impressive safety record is not jeopardised.

Knowledge transfer is one of the core mission statements of the WLPGA. This year the Association, together with WLPGA Board member Pak Hanung Budya, Supply and Marketing Director of Pertamina, Indonesia's State owned integrated oil, gas and renewable energy company, designed a three day downstream LPG training course for both Pertamina staff and regional participants.

The course was managed by the *All Events Group* in Singapore and held at the prestigious Pertamina University in Jakarta during December 2014. The training course attracted over sixty participants. WLPGA Director David Tyler ran the programme, together with several other experienced trainers.

Following this inaugural event the WLPGA will examine the possibilities of expanding this initiative to a wider audience in other regions. There is an opportunity for the WLPGA to become the 'go to' organisation for industry training.

The WLPGA has built up an impressive library of materials - through the publication of its Guidelines for Good Business Practices and Good Safety Practices, together with its more prescriptive guidelines – and these will form the basis of the training being delivered.

The training offering will be structured around a two week *LPG Academy* that can also be broken down into one, two or three day courses.



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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 LPG technology around the world. The 2014 GTC was held in Miami as part of the World Forum. Over 30 papers were submitted and this very successful event was attended by over 200 delegates.



Top to bottom:
Bart Van Aerle, Managing Director of Prins Autogassystemen B.V., receiving the Innovation Award trophy from James Rockall.

The presenters of GTC Session 1: Operations, chaired by Greg Kerr of PERC.

GTC Miami 2014.

Each year representatives from the industry are invited to submit abstracts describing some of their most innovative pieces of technology. Submissions include topics from the whole downstream distribution chain from wellhead to consumer. An independent steering committee selects 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 best selected papers are presented at GTC during the WLPGA Forums and are shortlisted by the steering committee for the prestigious WLPGA Innovation Award.

The winner of the 2014 WLPGA Innovation Award was WLPGA member Prins Autogassystemen B.V. from the Netherlands with their paper "Development of Dual-Fuel technology Prins Dieselblend-2.0 system enabling heavy duty vehicles driving on LPG", presented at the GTC held in London in 2013. With this system, drivers of heavy duty vehicles can save costs and save the environment through the reduction of exhaust emissions. With over 70,000 Autogas stations around the world, the infrastructure already exists to easily introduce LPG into diesel fueled vehicles. This is a strong example of how the LPG industry is working hard to turn innovative ideas into a real product which has the potential to create an enormous demand for LPG. The system is being sold worldwide via a well-trained network.

This year there were also two joint runner-up awards that went respectively to AIUT of Poland for the paper entitled "Bulk Customers Delivery Planning Optimisation with Distribution Intelligence Solution, AmeriGas Poland Case Study" and to ITO Corporation of Japan, a previous winner of the Innovation Award, for their paper "Eco-Friendly LPG Vaporization by Efficient Use of Atmospheric Heat".

James Rockall presented the winner and runners up with glass trophies and also with complimentary passes for the World LPG Forum 2015 which will take place in Singapore.



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Farming

LPG is used to increase the production and quality of farm products through crop harvesting, crop drying and weed flaming.

2014 Events Overview

As well as events organised by the WLPGA, the Association supported the following global industry events during 2014:

- January 28** Cartagena, Colombia: WLPGA Network Meetings (GAIN, GLOTEC, GCN)
- January 29** Cartagena, Colombia: WLPGA Regional Summit "Exceptional Energy for the Andes"
- January 30** Cartagena, Colombia: WLPGA Good Industry Practices Workshop, WLPGA Board & Industry Council Meetings
- February 5 - 7** Miami, USA: Argus Americas LPG Summit
- March 5 - 6** Warsaw, Poland: Exceptional Energy for Poland International LPG Conference
- March 6 - 7** Tokyo, Japan: 19th International LP Gas Seminar
- March 10** Manila, Philippines: WLPGA Good Industry Practices Workshop
- March 10 - 12** Manila, Philippines: 3rd Annual Asian LP Gas Summit
- March 12 - 14** Tianjin, China: 19th China LPG Conference
- March 18 - 20** Nairobi, Kenya: PIEA - WLPGA East Africa LPG Training Workshop
- March 23 - 26** Houston, USA: 2014 IHS International LPG Seminar
- April 2 - 4** Hong Kong: International New Energy Vehicle Show
- April 8 - 9** Nay Pyi Taw & Yangon, Myanmar: WLPGA Good Industry Practices Workshop
- April 12 - 14** Atlanta, USA: South-Eastern Convention & Expo
- May 6 - 9** London, UK: HNS Convention Meetings
- May 12 - 13** Genoa, Italy: WLPGA Board, Industry Council & Network Meetings (GAIN, GLOTEC, GCN)
- May 13 - 15** Ottawa, Canada: Canadian Propane Association Leadership Summit
- May 14 - 15** Genoa, Italy: 2014 AEGPL Congress
- May 15 - 16** Singapore: Argus LPG Asia 2014
- June 1 - 3** Washington DC, USA: Propane Days
- June 9 - 11** Singapore: IHS Asia LPG Seminar
- July 25 - 28** Palm Coast, USA: Florida Propane Gas Association Annual Convention
- September 8 - 10** Mexico City, Mexico: 20th IHS Annual Latin America LPG Seminar & Workshops
- September 16 - 17** Cape Town, South Africa: Argus Africa LPG 2014
- October 1 - 3** Taipei, Taiwan: LPG Summit
- October 2 - 4** Querétaro, Mexico: Mexican GLP Forum
- October 6** York, UK: UKLPG Annual Conference 2014
- October 9 - 10** London, UK: OPIS Europe LPG
- October 10** Rome, Italy: HNS Convention Meetings
- October 13 - 17** London, UK: LPG Trading, Marketing & Price Risk Management
- October 20 - 24** London, UK: HNS Convention Meetings
- October 27** Miami, USA: WLPGA Board & Industry Council Meetings
- October 28 - 29** Miami, USA: 27th World LPG Forum & 29th AIGLP Congress
- October 30** Miami, USA: WLPGA Global Technology Conference & Global Autogas Summit
- October 31** Miami, USA: WLPGA Network Meetings (GAIN, GLOTEC, GCN)
- November 17 - 18** Colombo, Sri Lanka: WLPGA Autogas Forum & Cooking For Life Seminar
- November 19 - 21** Colombo, Sri Lanka: Better Air Quality
- November 25 - 26** London, UK: Argus European LPG Markets
- December 2 - 4** Jakarta, Indonesia: WLPGA Downstream Training Course
- December 8 - 11** Singapore: LPG Asia Conference

Publications

WLPGA produces a variety of publications, from reports freely available on the WLPGA website to dedicated network papers available to members only. In 2014 a wealth of publications was produced:

Cooking For Life Studies

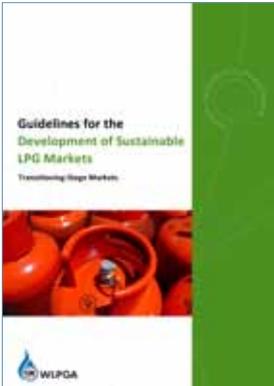
In support of the Cooking For Life campaign two major reports were produced: "Cooking with Gas: Why women in developing countries want LPG and how they can get it" and a further report looking at the current and potential role of LPG in electricity demand-side management (DSM) programmes, with a particular focus on the advanced, industrialised countries. The campaign also released Roadmap to a Billion in early 2014 which set out the planning and principal activities of this key campaign.



Exceptional Energy Case Studies

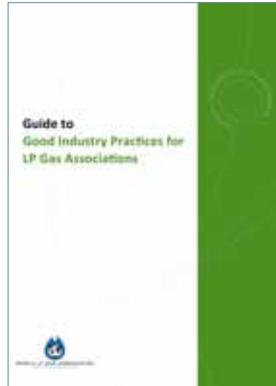
WLPGA continues to build on the Exceptional Energy case study library with a suite of success stories. A focus on this year's contributions has been on the value of LPG in food and beverage production and new facilities around the globe. WLPGA also produced a more in depth case study focusing on LPG as an Exceptional Energy for small island developing states.





GCN Reports

The GCN produced a report addressing the development of sustainable LPG markets for transitioning stage markets as a follow up to the early stage edition produced in 2013.



Good Industry Practices Guidelines

A further guideline was produced to enhance the Good Industry Practices suite looking at good industry practices for LPG Associations.



Autogas Incentive Policies

This report seeks to explain why governments encourage switching to Autogas and how they go about doing so based on an in-depth survey of the world's largest Autogas markets. It is available for free download on both the WLPGA and Autogas websites (<http://auto-gas.net>)

Statistical Review of Global LPG 2014

Argus Media published the 2014 WLPGA Global Statistical Review in October, the third year that they have been responsible for this flagship WLPGA document. The Global Statistical Review is an important part of the WLPGA membership proposition as it is made available free of charge to members. Non-members wishing to have a copy can purchase from Argus Media.

According to the 2014 statistics, global demand for LPG was 265mMT in 2013, an increase of nearly 3% over 2012. The USA is now the largest exporter of LPG in the world. LPG as a residential cooking fuel is by far the most popular application at 46% of the total demand.

Argus Media are contracted to produce the statistics until 2016.



WLPGA Newsletters

WLPGA produces regular newsletters ranging from the flagship monthly global communication to more dedicated newsletters to certain sectors of the industry such as GLOTEC News, Autogas Updates and a dedicated communication to WLPGA members 'Insider'.



World LPG Forum 2014

An Exceptional World LPG Forum Wrapped up in Miami

The WLPGA and AIGLP co-hosted the 27th World LPG Forum & 29th AIGLP Congress under the theme of 'The Future Starts Now' from 28th – 30th October 2014 in Miami. This marks the first time the World LPG Forum returned to the USA since 2006. With a sold-out exhibition and an outstanding conference programme, this event was an unprecedented success affording unique networking, learning, and business opportunities.



With a packed two-day conference there were many highlights, one of which, the opening by the Deputy Mayor of Miami Dade-County, Mr Jack Osterholt followed by the keynote from Mrs Rosanety Barrios from the Under Secretary of Hydrocarbons. Most remarked was the keynote from Celebrity Chef and global advocate for clean cooking José Andrés. WLPGA President Kimball Chen and José Andrés signed an agreement whereby WLPGA and World Central Kitchen will work together to create Good Practices Guidelines for the conversion of institutional kitchens (schools, hospitals, orphanages, barracks, etc.) from biomass to LPG.

Other main sessions included an opening round table addressing the continued gap between global LPG supply and demand, and the much anticipated launch of the **LPG Applications database**

(www.lpg-apps.org). Further sessions focused on the fundamental changes the global LPG market is currently experiencing and how understanding these will be key to survival. Another panel focused on smart marketing and communications techniques, discussing the best methods to shift perception and usage of LPG.

A new and exciting initiative from WLPGA, the first **Global World Women in Propane** session, was chaired by Nikki Brown of Cavagna Group. Following on the success of the U.S. Women in Propane Council, this session took a fascinating, in-depth look at the very real need to provide female role models for leadership in the industry.

As well as the Conference, the week-long event also had two half-day sessions for the **Global Technology Conference (GTC)** and **Global Autogas Summit**. The GTC, an annual event organised by WLPGA alongside the Forum, is the opportunity for companies to showcase the very latest technological innovation impacting the global LPG industry. The **Global Autogas Summit**, was a half-day event addressing the engine fuel sector. This year's Summit looked at fuel metering technology for modern vehicles and fleet management.

The 28th World LPG Forum will take place in Singapore from 28th September – 2nd October 2015.



"In a changing global energy market, the Women in Propane Council is equipping our members in the United States with the tools they need to be successful. I'm encouraged by the steps that WLPGA is taking and to working with a worldwide Women in LPG group in the near future."

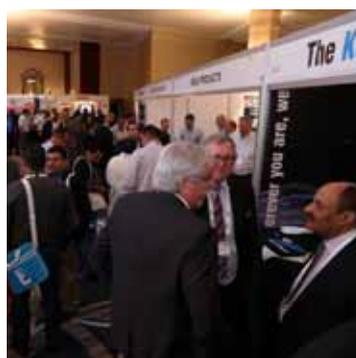
Nancy Coop
Business Development Executive, Ferrellgas
and Founding Chair of
Women in Propane Council



Contact: **Esther Assous**
Events Director
eassous@wlpga.org

“CIMC HONTO (a subsidiary company of CIMC ENRIC) regularly supports WLPGA events by taking a booth at the Asian regional events. At the recent Autogas and Cooking For Life Summit in Colombo we were one of the co-sponsors and were very pleased with the result. We secured several orders for our equipment and have now decided to join the WLPGA as a full member. **We look forward to being part of the WLPGA, especially as the World Forum will be in Singapore next year.**”

CIMC HONTO (a subsidiary company of CIMC ENRIC) - China



Photos clockwise from top left:
 Mr Jack Osterholt, Deputy Mayor of Miami-Dade County, USA.
 Mrs Rosanety Barrios, Coordinator of Industrial Policy of Hydrocarbons, Under Secretary of Hydrocarbons, Mexico.
 Women In Propane Panel.
 James Rockall, Nikos Xydias and Roy Willis of PERC launch Exceptional In Energy In Action.
 Exhibition and session photographs.

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 five other Board Members. The current Board was elected at the Annual General Assembly of 28th October 2014 in Miami, USA. 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.



Industry Council

The Industry Council was inaugurated in 1996 and is composed of leading companies in the LPG 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 LPG worldwide and promoting LPG use to satisfy the growing need for an all-purpose, efficient and environmentally friendly fuel. Whether focused on specific market segments or the LPG industry in general, the Industry Council's actions are designed to increase the worldwide use of LPG.

In 2014 the Industry Council was joined by Blossman Gas, Flogas and Petredec.



The WLPGA Team



From left to right:

Nikos Xydas

Technical Director

Camille Pieron

Communications Coordinator

Laurence Poret

Office Manager
and Member Relations Manager

Michael Kelly

Director Market Development
and Deputy Managing Director

Alexander Stöhr

Autogas Manager

Debbie Tyler

David Tyler

Director Projects
and Business Practices

Alison Abbott

Marketing
and Communications Director

Rita Pecilunas

Event Sales Manager

Esther Assous

Events Director

James Rockall

CEO and Managing Director



During 2014 the WLPGA team has been ably supported by our exceptional interns (left to right):

Julius Erukilede, Francis Ansong, Faten Benbekhaled and Bayo Ibirogb

Conference
& Exhibition

28th September -
2nd October 2015

Suntec Singapore International
Convention & Exhibition Centre

28th WORLD LPG FORUM SINGAPORE



www.worldlpgforum2015.com





WLPGA



LPG
EXCEPTIONAL
ENERGY

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