LP Gas A Global Perspective: Reality and Challenges

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1. The WLPGA
2. The realities…
3. The perceptions…
4. The challenges…
5. The way forward.
The Unique Global Association representing the LP Gas Industry for 25 years

- Nearly 200 members operating in over 90 countries in the world
- Representing the interests of the full LPG value chain from producer to distributor
- Partnering with key global organisations such as the World Bank and the UNDP

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.
A powerful Industry Association
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Reality #1: Oil & Gas will continue to supply a growing energy demand

- World Energy needs in 2030 will be 60% higher than in 2000
- Fossil fuels will continue to dominate, accounting for 80% of total demand by 2030

Source: International Energy Agency
Reality #2: LPG production is set to increase, beyond the growth in demand…

Leading to a growing opportunity for increasing premium demand…

![Graph showing LP Gas volume (million tonnes) from 2000 to 2012E. Supply line indicates >50 million tonnes.]
According to the landmark 2006 WHO study “Fuel For Life, Household Energy and Health”

- ... smoke from indoor cooking fires from traditional fuels such as kerosene or wood kills 1.6 million every year, more more people than malaria, and almost as many as unsafe water and sanitation

- ... smoke in the home is the fourth greatest cause of death and disease in the world’s poorest countries

- WHO have highlighted LP Gas as the cost effective solution for reducing pollution from cooking fuel
Reality #4: LPG is an Exceptional Energy...

- It burns cleanly with little smoke or residual particulate matter
- Relatively low pollutant emissions
- Low Green House Gas (GHG’s) emissions
- Helps fight deforestation by substituting “traditional fuels”
- Frees women and girls from drudgery of searching for firewood
- Bottles can be stored indefinitely
- Easily transported and used virtually anywhere -- from urban centres to remote regions
Reality #5: LPG growth requires sound energy policies

- Recognition of the benefits that LPG use can bring
  - Low carbon
  - Health benefits
  - Improved efficiencies
- Need for level playing field compared to other energies
- Stable, long term policies providing confidence to investors
- Sound regulatory environment with correct enforcement
Reality #6: “LPG is the best kept secret in the energy industry”...

- $300 billion per year
- 2,000,000 employees
- 3 billion consumers
- Eight times around the world....
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LPG Share of Voice

International media published in English over a three month period

- **Consumer Information** (Price, Supply): 41
- Environmental: 60
- Corporate Initiatives: 31
- Government Regulation: 61
- Safety: 179
LPG Sentiment

Found in international media published in English over a three month period

- **Positive**: 38
- **Neutral**: 14
- **Negative**: 48
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A complex world without consistency
What can we do?

1970s = 500 ads/day ... today, it’s >5,000

This year > $4 \times 10^{19}$ bytes of info generated = more info than past 5,000 years

We have to compete for “share of mind” with other energies
Change perceptions!
Need to position LP Gas clearly and consistently

 ✓ Clear, common messaging across the world
 ✓ Recognisable look and feel to positioning regardless of market
 ✓ Development of a GLOBAL BRAND

Why bother?

1% increase in perception = 1% change in support = 1% change in financials

Source: Reputation Institute
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Exceptional Energy website:

Broad benefits website

Showcasing global case studies

Media Room

Resource Centre – reports and studies

Possible to translate into different languages
Global ad campaign...

EXCEPTIONAL CIRCUMSTANCES REQUIRE EXCEPTIONAL ENERGY

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 innovative energy source. LPG is immediately available anywhere and supports the use of renewable technologies.

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

EXCEPTIONAL PEOPLE REQUIRE EXCEPTIONAL ENERGY

LPG provides energy for cooking, heating and power. Designers of energy efficiency, LPG provides a safe, clean and efficient energy source for billions of people worldwide.

For more information, please visit:
www.exceptionalenergy.com
Global supporters now behind the brand...
Exceptional Energy Global Websites
WLPGA Africa Pipeline

- LP Gas: Exceptional Energy for West Africa – Lagos, March 2009
- LP Gas: Exceptional Energy for North Africa – Marrakech May 2010
- LP Gas: Exceptional Energy for East Africa – Nairobi July 2011
- LP Gas: Exceptional Energy for Southern Africa - Johannesburg November 2012
- LP Gas: Exceptional Energy for Africa – London September 2013
Doha, Qatar 26th – 29th Sept 2011

THE premier event for the global industry

First WLPGA Forum in Gulf

High level strategy & developments

Global Technology Conference

Exhibition marketing launched – already sold out
WLPGA strives to unite the industry in its voice ...  

... and also in its practices  

WLPGA establishes global safety and business guidelines to support the industry with a common voice  

This East Africa Workshop is one of a series of global workshops to support this
Thank you