



WORLD LPG ASSOCIATION

ANNUAL REPORT 2019



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2019

KEY ACTIVITIES

The core activities of the WLPGA are covered in four key goals:



1

Demonstrating the benefits of LPG and informing, educating and influencing a variety of stakeholders.



2

Supporting the development of LPG markets.



3

Promoting compliance with standards, good business and safety practices.



4

Identifying innovation and facilitating knowledge transfer.



The Six Pillars of The Charter of Benefits



HEALTH



CLIMATE



**ECONOMIC GROWTH
& SOCIAL PROGRESS**



**RESOURCE
EFFICIENCY**



EFFICIENCY



ENERGY FUTURE

FOREWORD

FROM THE

PRESIDENT



It is a great honour to have been elected as your President at the highly successful WLPGA conference in Amsterdam in September, and a privilege to begin work with colleagues from across our industry to promote LPG as a highly relevant energy source for the long term.

I have the pleasure of introducing our 2019 Annual Report against a background of intensifying debate around sustainability and air quality. No matter where you are in the world, you cannot help but observe the increasing demands by activists for immediate action to tackle climate change, and the broader calls from younger generations for more to be done to protect our environment. National governments, regional governments and city mayors are responding through energy regulation to reduce fossil fuel consumption and support the development of renewable energy. Looking forward, the intensity of the debate will only accelerate further as a growing world population is increasingly impacted by the effects of climate change.

The good news is our industry is already playing a significant role in energy transition as LPG is seen as a cleaner, affordable energy source for the future. Around the globe we are seeing LPG replace biomass in rural communities – in India, for example, the local LPG industry has


increased LPG consumption by almost 1 million tonnes in 2019. Growth also continues strongly in rural China, in Indonesia, in Bangladesh, and across many countries in Africa. We are also seeing in Europe and in parts of North America a move to LPG from oil products across commercial, industrial and residential sectors – all driven by the hard work and ingenuity of LPG distributors. Further, we are seeing new applications powered by LPG such as mid to large scale power generation and shipping, and an emerging availability of BioPropane.

However, despite this progress we face a real threat in the medium term. Indeed, our success risks being part of the problem in creating a danger of complacency. As members, we look to demand next week and next month and put any variations down to the impact of weather or short-term economic factors. In reality, we risk being overwhelmed by the global rush towards de-carbonisation through electrification, renewable and other lower CO₂ emitting fuels; And this is not just a challenge for

certain markets in say Europe where the environmental agenda is more advanced – we are seeing small scale solar projects in Africa, electric heat pumps in California, and LNG for example in Latin America and China.

To confront this challenge, we all have a role to play in promoting the merits of LPG as individual members in our respective businesses and organisations, through our national associations, and of course through the WLPGA. What was really encouraging in 2019 was the outcome of the WLPGA three-year planning process where members put forward views on the top priorities for the industry. Here there was little ambiguity in setting three core activities – firstly **Advocacy** to professionally promote the LPG message to target stakeholders, then **Business Improvement** to support the industry in setting the highest standards, and thirdly **Innovation and Growth** to demonstrate that we are a relevant fuel for the future. Please be assured that your

MAJOR TRENDS



NEW POTENTIAL FOR THE USE OF LPG IN POWER GENERATION & MARINE ENGINES



CONSUMPTION
GROWTH OF
3.8%

RESIDENTIAL
MARKET TOPPED
138 MILLION
TONNES



26,987,452
AUTOGAS VEHICLES
(+330,000 VEHICLES)

association has both welcomed and embraced this clear agenda. As the unique global body that represents the LPG sector we now have the responsibility to deliver. In the first year of my presidency, I am committed to supporting the WLPGA team in converting this strategy into action and look forward to communicating more to you on progress at our events throughout 2020. I would encourage

you to participate in the debate, and certainly to join us in Washington at the regional summit in February and at the 2020 World LPG Forum in Dubai.

Finally, I would like to thank all WLPGA members, committees and working groups, as well as the hard-working management and staff of your association for their real passion and commitment to our industry. Today

our membership is stronger than ever, and it's great to see an increasing participation in the Industry Council which for me demonstrates a desire to debate the many opportunities our industry has ahead.

Henry Cubbon
President, WLPGA

MANAGING DIRECTOR'S REPORT 2019



The global energy industry is in transition. Energy has become the subject of much debate and the LPG sector is undoubtedly impacted by this. This impact can be positive or negative and which will depend to a great extent on how successful we are at making the positive case for LPG in the future energy mix.

The summer of 2019 saw record temperatures across Europe and the world; and stark warnings from scientists, with climate change at the forefront of the public's mind. Teenage climate activists have garnered global attention and the world is seemingly embarrassed by its ongoing oil and coal addiction. The energy transition is a move, driven principally by concern about climate change, to a range of new technologies to deliver affordable, secure and sustainable energy in the 21st century. I welcome this ambition, but with much of our economic activity and productivity around the globe dependent on the availability of reasonably priced energy, we must be sure that the energy transition doesn't leave people behind. We need a substitution away from fossil fuels but the pace and scope of this change needs to be considered in a responsible way. I strongly believe that LPG can be an enabler of the transition and it should be part of the solution for a responsible energy future.

LPG is the world's favourite form of gas energy. More people use it directly than any other gaseous fuel. LPG is a

clean-burning, low carbon fuel which delivers many benefits to society. For example, in the developing world LPG stoves are improving health and literally saving lives by replacing wood and other polluting fuels. In OECD countries, millions of homes and business beyond the natural gas grid get access to the latest gas technology via self-contained LPG vessels. And when society became concerned about the emissions and air quality impact of road transport, LPG Autogas became the alternative fuel of choice in many countries around the world. It still is, and it will continue to grow. Today these applications and thousands more are part of everyday life for millions of consumers all across the world. Tomorrow these benefits and more will be secured through the development of bio and renewable LPG.

Looking at our activities and results, 2019 was an excellent year for the WLPGA. In this final year of our current three-year strategic plan, we successfully completed or exceeded the objectives that we set ourselves. Our annual Forum, held in Amsterdam in 2019, was one of our most successful ever. But we plan to exceed this in 2020

with the launch of LPG Week in Dubai from October 31st. With the 33rd World LPG Forum at its core, LPG Week will aim for an unprecedented focus on our sector and I encourage you to be there.

This year WLPGA has completed a new strategic review for 2020 – 2022 entitled "Solutions for a Responsible Energy Future" in which we set out our planning for the next three years as we respond to the challenges and opportunities of a global energy industry in transition. It is important to recognise that our success will come from the joint and coordinated efforts of our hundreds of members worldwide.

The WLPGA is unique. We are the global voice of the LPG industry and we deliver exceptional value to our members and the LPG sector more broadly. Whatever your business; join us, contribute and benefit from the leading global LPG network that is the WLPGA.

James Rockall

CEO and Managing Director, WLPGA

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[@james_rockall](https://twitter.com/james_rockall)

THE INDUSTRY IN 2018

PRODUCTION

EXCEPTIONAL
GROWTH RATE OF
 **3.6%**



GLOBAL AVAILABILITY

WITH INCREASED
PRODUCTION OUTPUT IN THE
US, CHINA & THE MIDDLE EAST



PRODUCTION
GREW OVER 10%
IN BOTH US AND CANADA


GLOBAL PRODUCTION

  **317**
MILLION
TONNES

RESIDENTIAL AND PETROCHEMICALS SECTORS

 
SHOWED
STRONG GROWTH

CONSUMPTION


9%
DEMAND GROWTH IN
SUB-SAHARAN AFRICA

 **≤1M**
DEMAND IN INDIA
SLOWED DOWN BUT STILL
GREW BY ALMOST
1 MILLION TONNES



STABLE DEMAND
FOR AUTOGAS
BUT DECLINE IN TRADITIONAL MARKETS

 **5-10%**
VIETNAM, THE
PHILIPPINES, SRI
LANKA AND NEPAL
ALL SHOWED 5-10% GROWTH



**COLD WEATHER
LED TO GROWTH**
IN MANY MARKETS

THE WLPGA MISSION

ABOUT THE WLPGA

Support

The development of LPG markets.

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.

Promote

Compliance with standards, good business and safety practices.





Identify

Innovation and facilitate knowledge transfer.

THE WLPGA VISION

The WLPGA promotes the use of LPG to foster a safer, cleaner, healthier and more prosperous world.

"Participation in the WLPGA right from its start has been extremely important for the Brazilian LPG industry. Not just because of being able to share knowledge and experience with the global LPG community, but also because it is a world-renowned reference for the implementation of good practices, the development of markets and the construction of a new diversified and sustainable energy economy. The WLPGA's work involving economic, scientific and technological research and analysis, is also a solid reference for the regulatory balance in the various countries and for the countless opportunities for new applications of LPG in industry, commerce, agribusiness and even in homes. The brand "Exceptional Energy", adopted by the WLPGA, and by us, at Sindigás, shows that LPG will continue to play a relevant role in the energy matrix of Brazil and the world in the future."



Sergio Bandeira, Sindigás President

2019 MEMBERSHIP

ASIA & PACIFIC

Astomos Energy Corporation, **Japan**
Bangladesh University of Engineering & Technology, **Bangladesh**
Bashundhara LP Gas Limited, **Bangladesh**
BB Energy Asia Pte Ltd, **Singapore**
Beximco Petroleum Ltd, **Bangladesh**
Bharat Petroleum Corporation Limited, **India**
BM Energy (BD) Limited, **Bangladesh**
Brunei Shell Marketing Co. Sdn. Bhd., **Brunei**
BW LPG, **Singapore**
CIMC Enric Jingmen Hongtu Special Aircraft Manufacturing Co., Ltd, **China**
Clean Air Asia, **Philippines**
Dashvaanjil Co Ltd, **Mongolia**
E1 Corporation, **South Korea**
Elgas Limited, **Australia**
Elpiji (M) SDN. BHD, **Malaysia**
Eneos Globe Corporation, **Japan**
Energypac Power Generation Ltd, **Bangladesh**
Epic Gas Ltd, **Singapore**
FIPI - Federation of Indian Petroleum Industry, **India**
Gas Academy, **Singapore**
Grassroot Trading Network for Women (GTNFW), **India**
Gujarat University, **India**
Gyxis, **Japan**
Hangzhou Yuhang Zhangshan Steel Cylinder Co. Ltd, **China**
Hindustan Petroleum Corporation Ltd, **India**
Hong Kong & China Gas Co Ltd, **China**
Hubei Daly LPG Cylinder Manufacturer Co Ltd, **China**
Indian Auto LPG Coalition, **India**
Indian Oil Corporation Limited, **India**
Isla LPG Corporation, **Philippines**
ITO Corporation, **Japan**
Iwatani International Corp., **Japan**
Jamuna Spaceteck Joint Venture Limited, **Bangladesh**
Japan LP Gas Association, **Japan**
JOGMEC, **Japan**
Koagas Nihon CO, LTD, **Japan**
Korea Gas Safety Corporation, **South Korea**
Korea LPG Association, **South Korea**
Laugfs Gas Plc, **Sri Lanka**
Liquigas Power Private Limited, **India**
Litro Gas Lanka Limited, **Sri Lanka**
LP Gas Center, Japan (LPGC), **Japan**

LPG Association of New Zealand, **New Zealand**
LPG Association (Singapore), **Singapore**
LPG Operators Association of Bangladesh, **Bangladesh**
LPG Summit, **Singapore**
Maldiva Gas Pvt Ltd, **Maldives**
Mauria Udyog Limited, **India**
Nepal LP Gas Industry Association, **Nepal**
New Cosmos Electric Co., Ltd, **Japan**
Oil and Gas Regulatory Authority, **Pakistan**
Oil Industry Safety Directorate - Government of India, **India**
Omera Petroleum Limited, **Bangladesh**
Optech Engineering PVT. Ltd., **India**
Origin Energy, **Australia**
Parami Energy Services Co Ltd, **Myanmar**
Pertamina, **Indonesia**
Petredec Services (Asia) Ptd Ltd, **Singapore**
Philippines LPG Association, **Philippines**
Plantation Human Development Trust, **Sri Lanka**
Rinnai Corporation, **Japan**
Sahamitr Pressure Container Public Co. Ltd (SMPCPLC), **Thailand**
Saisan CO LTD, **Japan**
SCG (Thailand) Co Ltd, **Thailand**
Secretariat of the Pacific Community (SPC), **Fiji**
Self Employed Women's Association (SEWA), **India**
SK Gas, **South Korea**
Southern Gas Trading JSC-Cylinder Branch, **Vietnam**
Spectrum Sustainable Development Knowledge Network, **Myanmar (Burma)**
Sunrise LP Gas & Energy Group, **China**
Supergas Co. Ltd, **India**
Taizhou City Yuehai Manufacturing Co Ltd, **China**
Tianlong, **China**
TPA Metals and Machinery Co. Ltd, **China**
Unique Central Piped Gases Pvt Ltd, **India**
Wesfarmers Kleenheat Gas Pty Ltd, **Australia**
Woodfield Systems International, **India**

MIDDLE EAST

Al Aman Gas Cylinders Manufacturing L.L.C., **United Arab Emirates**
Brothers Gas, **United Arab Emirates**
Central Gas Jordan, **Jordan**
E.ON Masdar Integrated Carbon Ltd. (EMIC), **United Arab Emirates**

Emirates Gas LLC, **United Arab Emirates**
Gasco Saudia Arabia, **Saudi Arabia**
Jordan Petroleum Refinery, **Jordan**
KCME Co for Gas Installation & Contracting, **Kuwait**
Kuwait Oil Tanker Co. K., **Kuwait**
Natgaz, **Lebanon**
National Gas Company - SAOG, **Oman**
Pazgas Ltd, **Israel**
Saudi Mas Trading, **Saudi Arabia**
The Green Flame Gas Co., **Kuwait**
Unigaz International Ltd, **Lebanon**

NORTH & SOUTH AMERICA

Abagas, **Brazil**
Abastible SA, **Chile**
Algas-SDI, **United States**
Anova, **United States**
Arcosa Industrias de Mexico, **Mexico**
Asociacion Iberoamericana de Gas Licuado de Petroleo (AIGLP), **Brazil**
Blackmer, **United States**
Blossman Gas Inc, **United States**
Blue Star Gas, **United States**
Buenos Aires Gas SA (BAGSA), **Argentina**
Camara Uruguaya de Gas Licuado, **Uruguay**
Canadian Propane Association, **Canada**
Clean Cooking Alliance, **United States**
Copagaz Distribuidora de Gas Ltda, **Brazil**
Corken Inc, **United States**
Dorian LPG, **United States**
Egsa Do Brasil, **Brazil**
Empresas Lipigas, **Chile**
Envirofit International, **United States**
Ferrellgas, **United States**
Fisher LP Gas Equipment, **United States**
Gasco GLP, **Chile**
Gasnova, **Colombia**
GE GasPower, **United States**
Global LPG Partnership, **United States**
IHS, **United States**
Industrial Ochoa SA de CV, **Mexico**
International DME Association, **United States**
Lehr Incorporated, **United States**
Liquigas Distribuidora, **Brazil**
Manchester Tank & Equipment, **United States**
Mangels Industrial, **Brazil**
Marshall Excelsior Co., **United States**
Nacional Gas Butano Distribuidora Ltda, **Brazil**
National Propane Gas Association (NPGA), **United States**
Onyx Environmental Solutions, **United States**
OPIS, **United States**
Paraco Gas Corp., **United States**

Pembina Pipeline Corporation, **Canada**
 Persistent Energy Partners LLC, **United States**
 Polar Power Inc, **United States**
 Poten & Partners Inc, **United States**
 Projeto GLP Qualidade Compartilhada, **Brazil**
 Propane Education & Research Council (PERC), **United States**
 Red Seal, **United States**
 RegO Products, **United States**
 Sindigas, **Brazil**
 Stanford University, **United States**
 Supergasbras Distrib. de Gas S/A, **Brazil**
 Switch SA, **Haiti**
 Targa Resources, **United States**
 UGI Corporation, **United States**
 Ultragaz, **Brazil**
 Unidad de Planificaci3n Minero Energetica, **Colombia**
 UNIPET, **Trinidad & Tobago**
 Vertrax Inc, **United States**
 Weber-Stephen Products Company, **United States**
 Wingaz S.A., **Haiti**
 Winrock International, **United States**
 World Central Kitchen, **United States**

AFRICA

Africare, **Nigeria**
 Afriquia Gaz, **Morocco**
 Afrox, **South Africa**
 Asiko Power Limited, **Nigeria**
 Caisse de Stabilisation des Prix des Hydrocarbures, **Cameroon**
 Department of Petroleum Resources Nigeria, **Nigeria**
 Fenix International, **Uganda**
 Gas to Health Initiative GTHI, **Nigeria**
 Ghana Cylinder Manufacturing Company (GCMC), **Ghana**
 Ghana Oil Company Limited, **Ghana**
 LP Gas Safety Association of South Africa (LPGSASA), **South Africa**
 Ministry of Energy, Ghana, **Ghana**
 Ministry of Mines and Petroleum of Ethiopia, **Ethiopia**
 Ministry of Petroleum Resources, **Nigeria**
 National Economic Empowerment council, **Tanzania**
 National Petroleum Authority, **Ghana**
 Navgas Limited, **Nigeria**
 Nigeria LNG limited, **Nigeria**
 Nigeria LP Gas Association (NLPGA), **Nigeria**
 Nigerian National Petroleum Corporation (NNPC), **Nigeria**
 OVH Energy Marketing, **Nigeria**
 Paygo Energy, **Kenya**
 Petrogas S.A., **Mozambique**

Petroleum Institute of East Africa (PIEA), **Kenya**
 Pilot International, **Uganda**
 Proto Energy Limited, **Kenya**
 Salam Gaz, **Morocco**
 SNDP, **Tunisia**
 Somas, **Morocco**
 Sonatrach, **Algeria**
 Standards Organisation of Nigeria, **Nigeria**
 Techno Oil, **Nigeria**
 The Lagos Chamber of Commerce & Industry, **Nigeria**
 Thomas Aquinas Foundation, **Ghana**
 Tradex, **Cameroon**
 Ultimate Gas Ltd, **Nigeria**
 Vision in Energy, **South Africa**

EUROPE & EURASIA

2A Muhendislik San. Tic. A.S., **Turkey**
 Aggreko, **United Kingdom**
 AIUT, **Poland**
 Altinboga Gas Equipments, **Turkey**
 Amtrol-Alfa div. of Worthington Industries, **Portugal**
 Argus Media, **United Kingdom**
 Arhan Grup Talasli Imalat San. Ve Tic. Ltd. Sti. Orgaz, **Turkey**
 Assogasliquidi Federchimica, **Italy**
 Aygaz A.S., **Turkey**
 Carbon Clear, **United Kingdom**
 Cavagna Group, **Italy**
 CFBP - Comite Francais du Butane et du Propane, **France**
 CGH Group, **Belgium**
 Coral Gas, **Greece**
 DCC LPG, **Ireland**
 DEC/Design Engineering & Consulting, **Belgium**
 Durulsan Makina LPG Celik, **Turkey**
 DVFG, **Germany**
 Elaflex, **Germany**
 Energy Market Regulatory Authority of Turkey, **Turkey**
 Entrepreneurs du Monde, **France**
 Equinor, **Norway**
 FAS Flussiggas-Anlagen GmbH, **Germany**
 Finngas GmbH, **Germany**
 Flaga GmbH, **Austria**
 Friedrich Scharr KG, **Germany**
 GasLicuados, **Spain**
 GasStop Europe BV, **Netherlands**
 Gavedra, **Portugal**
 Gaz Transport & Technigaz, **France**
 Geogas Trading SA, **Switzerland**
 Gok Regler - Und Armaturen GmbH & Co. KG, **Germany**
 Greengear Global, **Italy**
 HEDON Household Energy Network, **United Kingdom**
 Hexagon Ragasco A.S., **Norway**
 Integrated Gas Technologies, **Denmark**
 International Chamber of Commerce, **France**
 International Fertilizer Industry Association (IFA), **France**
 International Gas Union, **Spain**
 IPIECA, **United Kingdom**
 Ipragaz A.S., **Turkey**
 Kautex Maschinenbau GmbH, **Germany**
 Liquid Gas Europe, **Belgium**
 Liquid Gas UK, **United Kingdom**
 LoW8, **Netherlands**
 Makeen Energy, **Denmark**
 MAN Energy Solutions, **Denmark**
 Omal SpA, **Italy**
 Oryx Energies, **Switzerland**
 OZDigal, **Portugal**
 Paresa, **Italy**
 POGP, **Poland**
 Power to educate AS, **Norway**
 Practical Action, **United Kingdom**
 Prins Autogassystemen B.V., **Netherlands**
 Project Capital, **Netherlands**
 REEEP, **Austria**
 Repsol, **Spain**
 Rochester Gauges International, **Belgium**
 Rubis Energie, **France**
 Sensile Technologies SA, **Switzerland**
 SHV Energy, **Netherlands**
 Sibur International GmbH, **Austria**
 Siemens Industrial Turbomachinery Ltd, **United Kingdom**
 The Partnering Initiative, **United Kingdom**
 Total, **France**
 Trafigura PTE Limited, **Switzerland**
 Trovan Ltd, **Isle of Man**
 Truma Geratetechnik GmbH & CO, **Germany**
 Turkish LPG Association, **Turkey**
 Tyczka Trading & Supply GmbH & Co. KG, **Germany**
 UNHCR, **Switzerland**
 Veroniki Holding, **Italy**
 Vivo Energy, **Netherlands**
 Wartsila Tank Control Systems, **France**
 World Alliance for Decentralized Energy (WADE), **United Kingdom**

BENEFITS FOR 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 and we offer a wide range of membership benefits.



NETWORK

WLPGA is a constantly growing leadership network with over 300 members operating in over 125 countries. The WLPGA global network brings together leaders of organisations from the entire LPG value chain including observer members from academic bodies, inter-governmental organisations, NGOs and national governments.



ACCESS

Members have access to the largest LPG network in the world which gives them a unique opportunity to present their position to the entire industry. Members are strategically placed around the world and by organising regular regional and global events, WLPGA membership offers a powerful platform for members to network.

WLPGA MATRIX DAY

The Matrix Day is held three times a year and offers members a full day of discussion on specific topics under the four key goals which are Communication, Market Development, Standards and Technology & Innovation. The Matrix Day allows members the opportunity to share ideas, processes and new technologies to ultimately enable the development of the entire LPG community.

WOMEN IN LPG GLOBAL NETWORK (WINLPG)

The mission of WINLPG is to support and help empower women in the industry by leadership, coaching, mentoring and promoting role models. WINLPG holds regular Knowledge Exchange sessions around the world and currently has six national chapters in South Africa, Nigeria, United States, Colombia, India and Myanmar.

THE ANNUAL WORLD LPG FORUM

Arguably the most important event in the LPG calendar, the World LPG Forum regularly attracts hundreds of exhibitors and thousands of delegates each year. The event travels the globe allowing leading executives from the industry and beyond an exceptional opportunity to meet 'everyone you need to know' in the sector.

"We have been a member of the Industry council for many years now. Attending Industry Council meetings is certainly a great way to connect with professionals who lead the Industry. In fact, one of the benefits of joining the Industry council is indeed the valued networking opportunities it provides, but most importantly, the Industry Council puts together best in class executives and experts and it provides invaluable opportunities to learn and talk about the future trends of our industry and therefore it delivers proactive thinking."

Miriam Cavagna
Head of Marketing and Communication,
Corporate Services
Cavagna Group

“Every time I participate in the regular meetings of WLPGA, such as the matrix meetings or Industry Council, I get very valuable information to bring back to our organisation. WLPGA is very productive in making specialised reports and leaflets like bioLPG or the LPG Charter of Benefits. They are very helpful and useful in the daily activities of our organisation. We thank so much the excellent staff at the WLPGA.”

Sakae Yoshida
Managing Director
Japan LP Gas Association
WLPGA Board Member



INFORMATION

One of the key goals of the WLPGA is to inform and educate stakeholders about the benefits of LPG. The WLPGA arranges regular interactive meetings and in-country workshops uniting technical experts, senior executives and other key stakeholders and is also able to foster extended influence by offering a highly credible source of information and data to enable members in their own outreach initiatives.

BUSINESS CONTACTS FOR MEMBERS

The WLPGA maintains an up-to-date Members' Directory with full and exclusive contact details which is only available to members, giving immediate contact with fellow industry leaders.

MEMBER QUERIES

The WLPGA provides members with a permanent query service covering fuel specification standards, equipment standards, consulting firms, engineering firms, safety rules, taxation policies, new business contacts and much more.

MEMBERS' ONLY EXTRANET

This password protected portal has been completely upgraded to offer members even more data, reports and a free shareable photograph library.

EXCEPTIONAL ENERGY & CHARTER OF BENEFITS TOOLKIT

'Exceptional Energy' is the brand developed by the WLPGA to raise awareness of the exceptional benefits of LPG. The WLPGA urges members to adopt the brand logo and quote the statistics given in the newly launched Charter of Benefits. A comprehensive toolkit is freely available online.

MEMBERS' ONLY REPORTS

The WLPGA publishes certain reports for exclusive distribution to members.

GLOBAL LPG STATISTICS

A major membership benefit is that each member receives one free copy of the Statistical Review of Global LPG, the highly referenced annual publication, produced by Argus Media for the WLPGA, used throughout the industry providing LPG production and consumption data for over 120 countries.



EDUCATION

Investing in knowledge building and sharing among members, and in educating key stakeholders is another important arm of the WLPGA's work.

WORKSHOPS & TRAINING COURSES

The WLPGA regularly organises interactive workshops, training and train-the-trainer courses, covering safety and good business practices, communications and Cooking For Life.

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 policy-makers and key opinion leaders.

ACCESS TO INTERNATIONAL INSTITUTIONS

Members have direct access to many NGOs and inter-governmental organisations. The WLPGA has Special Consultative Status with the United Nations and partnerships with major institutions such as the World Bank, the Asian Development Bank, The International Energy Agency, the UNHCR and the Global Alliance for Clean Cookstoves.

GLOBAL LEADERSHIP POSITION

The WLPGA enables broad industry representation with highly influential bodies where members benefit from a powerful leadership position that the association holds.



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 and multi-lateral institutions such as various different departments in the United Nations including Sustainable Energy For All, the World Bank and Regional Development Banks, and a number of respected international NGOs such as the Clean Cooking Alliance. The geographical spread and diversity of the WLPGA's membership makes the association a representative, trusted and logical partner in international discussions.



"WLPGA fulfils a key role for the industry to speak with one voice. The association is engaging with government and civil society stakeholders to raise awareness

on the role of LPG in decarbonising economies, and in sustainably developing off-grid communities. This new Advocacy role is essential and provides value to all members, whether big or small."

Bram Gräber
CEO SHV Energy
WLPGA Board Member & Industry Council

FACTS



HYBRIDS ARE GAINING INCREASING TRACTION

IN HEATING AND COOLING
SYSTEMS AND SHIPS

THE PETROCHEMICAL SECTOR
INCREASED BY
300,000 T/YR



LOW CARBON & CLEAN BURNING

COMPARED TO OTHER FOSSIL
FUELS, LPG IS RELATIVELY LOW
CARBON. IT ALSO HAS NO BLACK
CARBON (OR PM) EMISSIONS



ABUNDANT SUPPLY

LPG IS OBTAINED FROM THE
PRODUCTION OF **NATURAL GAS**
AND **CRUDE OIL REFINING** AND
CAN BE PRODUCED FROM
RENEWABLE SOURCES IN THE
FORM OF **BIOLPG**

3.6%



GLOBAL LPG
PRODUCTION
GREW BY
3.6%

AUTOGAS GLOBAL CONSUMPTION INCREASE OF



0.3%



NEW MEMBERS
IN 2019

AUTOGAS TOTAL CONSUMPTION

STILL DOMINATED
BY A FEW COUNTRIES
(TURKEY, RUSSIA, SOUTH
KOREA, POLAND, UKRAINE
AND ITALY)



LPG CAN PROVIDE

**CONSISTENT, STABLE
POWER BASELOAD**
REGARDLESS OF WEATHER
CONDITIONS

DOMESTIC USE REPRESENTS



44%

OF **GLOBAL LPG USE**

INDIAN DEMAND FOR LPG
GREW BY ALMOST



+4%

DRIVEN BY
THE **SWITCH**
FROM POLLUTING
COOKING FUELS
TO **CLEAN
COOKING**

IN BRAZIL **95%**



OF HOUSEHOLDS USE
LPG AS COOKING FUEL

GLOBAL COMMUNICATIONS





"2019 marks my third and final year as Chair of the Communications Goal. During this time, I have been committed to supporting the global outreach activities of the WLPGA communications team. In 2017, with the launch of the new WLPGA Three Year Strategic Plan, we made a pledge to completely refresh the communications activities and launched a 'back-to-basics' approach. This has resulted in a refined target stakeholder base, a significantly enhanced and more powerful social media strategy, and, of course, the production of our best-in-class LPG collateral. It has been my pleasure to lead the communications programme, and to see such very positive advances in the way we promote LPG as an Exceptional Energy. However, the work does not stop there. Our ongoing challenge is to ensure that our members continue to leverage these valuable resources, and so ensure that our industry communicates with one powerful voice."

Henry Cubbon
Managing Director, DCC LPG
WLPGA President

Global communications remain a critical area of WLPGA activities. Communications outreach ultimately impacts all of the work undertaken by the association, and is instrumental in ensuring that the LPG community, and beyond, are aware of not only the very specific benefits of LPG, but also of the association's many initiatives.

WLPGA produces world class collateral including documentation, ready-to-go sector specific toolkits and a library of free-to-use to help you save time and investment, and align the industry's global visibility.

WLPGA runs specific communications campaigns on issues that are facing our industry today to grasp opportunities so that LPG has a voice. As well as campaigns focussing on major work areas, WLPGA has also run a major campaign in 2019 'Exceptional Energy in the City' which addresses the role of LPG in combatting urban air pollution.



"The energy sector is facing transformative changes. Together with the WLPGA, the Canadian Propane Association works on common ground to drive forward the propane industry and be a game changer in Canada's future energy portfolio."

Nathalie St-Pierre
President & CEO
Canadian Propane Association

Follow us on social media! We engage with key stakeholders and international media via our active Twitter account (@WorldLPGAssoc), we engage with our member community through Facebook and have a LinkedIn account for open discussion.



@WorldLPGAssoc



WorldLPGAssociation



World LPG Association



worldlpgassociation



WorldLPG

A COMPREHENSIVE COMMUNICATIONS TOOLKIT



The branding toolkit continues to centre around the Exceptional Energy logo. This brand enables our industry to speak with one clear voice and is the master brand under which all WLPGA campaigns and events sit. WLPGA encourages all members to adopt the brand as widely as possible.

The Charter of Benefits was introduced in 2017 as a central element of a 'back to basics' campaign to outline the common messages under six themes: health, climate, economic growth & social progress, resource efficiency, energy future, and efficiency. This original Charter has since been developed to include Charters for specific areas of focus including Autogas, Cooking For Life, marine, power generation and bioLPG.



A third key piece of the toolkit is the LPG film, The Story of LPG. This eight-minute film charts the full history of LPG, its origins, uses, and future and is also available in four chapters.

BIOLPG AND THE DECARBONISATION DEBATE

Climate change is happening, and action is necessary. The LPG supply chain has a role to play in delivering cost-effective decarbonisation. Recognising this, WLPGA and Ecuity, with the support of DCC LPG, SHV Energy and UGI International, produced a major report entitled ‘The role of LPG and bioLPG in Europe’. This ground-breaking study looks at business

benefits from fuel switching in France, Italy and the UK with case studies that can resonate throughout regions where decarbonisation is an issue.

This report, together with a full communications toolkit and a Charter of Benefits for bioLPG are available for free download on the WLPGA website.



WORKING WITH FELLOW LPG ASSOCIATIONS

WLPGA membership includes thirty fellow LPG trade associations, both national and regional. This powerful global network enables the LPG community to deepen relations, strengthen communications and share

best practices and content. The group meets face-to-face during the World LPG Forum and also has a bi-monthly conference call to address specific association issues.

A DEDICATED SPACE FOR WLPGA MEMBERS

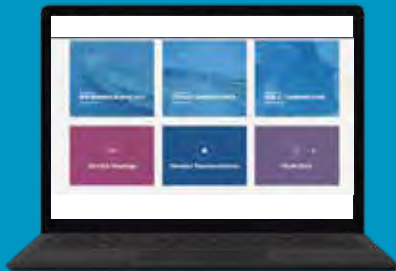
The WLPGA Members’ Portal has been revamped and includes now even more benefits such as an image library, technical reports, industry event discounts, and more. We encourage all members to use this password protected micro-site to book your attendance at key WLPGA internal meetings such as the Matrix meeting and our General Assembly.

2019 saw the introduction of MyWLPGA, an area within the Members’ Area where

your member admin contact can update the data we hold for your company, book your attendance at WLPGA Meetings and also pay your annual fees online or check the status of your account.



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Communications Director
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COOKING FOR LIFE

In 2019 the Cooking For Life initiative was focused on increasing the breadth and scope of its communications. The initiative created five new micro video stories that are easily deployable on social media to help spread information about the benefits of switching to LPG. It also created a detailed case study on the groundbreaking Pradhan Mantri Ujjwala

Yojana (PMUY) initiative in India that has led to unprecedented growth in access to LPG in that market. Cooking For Life also continued to work with UNHCR and other humanitarian organisations such as WLPGA member World Central Kitchen involved in using LPG in disaster relief or humanitarian situations.



COMMUNICATING ON AUTOGAS

2019 focused on identifying the extended ecosystem on sustainable mobility in order to better understand the landscape. The WLPGA conducted a Twitter stakeholder mapping and conversational analysis for 10 key markets around the world to identify an external target audience outside of the LPG industry.

WLPGA leveraged this work to roll out a communications campaign to launch the Global Roadmap for Autogas, including the first-ever promoted Twitter campaign to reach those key stakeholders through general and

market-specific tweets, promoting key messages from the Roadmap. By promoting the content, WLPGA was able to reach key stakeholders that did not necessarily engage with us before.

Using social media enables WLPGA to more easily and consistently engage with a wide target audience around the world to promote the report. The campaign ran in parallel to COP25 in order to broaden our conversation and widen out reach – to better engage in the mobility debate.

#Autogas

powers 27 million vehicles across the world and is serviced by a refuelling network of 79,000 stations. Find out what the potential for #Autogas could be through 2040 in the Global Roadmap report <https://bit.ly/2LTBVMK>

27
MILLION
VEHICLES
ACROSS
THE WORLD



POWER GENERATION

The working group on power generation continued to focus on raising awareness of the potential for this technology. In 2019 an interesting case studies was published. It focused on WLPGA member Wärtsilä's modern low emissions LPG fired power plant on the island of Roatan in Honduras, which was conceptualised and built for future large-

scale integration of renewable sourced energy. Complimenting this case study was an informational document on the benefits of hybrid LPG and renewable energy power systems. This infographic document is part of the suite of WLPGA 'Charter Of Benefits' that are designed to reach a large audience by being easily deployable on social media.

THE 2019 STATISTICAL REVIEW OF GLOBAL LPG

The latest statistical review of global LPG was published by Argus Media in September and contains comprehensive 2018 supply and demand data from over 120 countries.

The review confirmed LPG demand continues to increase. In 2018 volumes exceeded 313 million tonnes, an increase of 3.8% over the previous year.

There are now 37 countries that consume more than 1 million tonnes of LPG per year in non-chemical

applications. When petrochemical demand is factored in the number of countries consuming more than 1 million tonnes per year rises to 45.

Exports of LPG from North America now exceed the entire amount of exports from the Middle East.

The statistical review of global LPG is one of the flagship publications of the WLPGA. This valuable document is provided to all members as part of the WLPGA membership proposition.



BUILDING RELATIONSHIPS WITH KEY STAKEHOLDERS - THE INTERNATIONAL GAS UNION

WLPGA has an ongoing relationship with the IGU which ensures that LPG has a voice in the IGU overall strategy. In March 2019, WLPGA CEO James Rockall spoke during the IGU Diplomatic Gas Forum in

Seoul. WLPGA also has a seat at the Task Force 2 (Energy For All), represented by James Rockall, and at the Communications Committee, represented by Alison Abbott.



Delhi



Istanbul

REGIONAL SUMMITS

In 2019 WLPGA held two very successful Regional Summits, which are one day events and are designed to bring global visibility to regional issues while highlighting opportunities in specific markets. The first was held in New Delhi in February and was attended by more than 1,300 delegates from over 20 countries.

The event - entitled the WLPGA 2019 Asia LPG Summit - was opened by Shri Dharmendra Pradhan, the Indian Minister for Petroleum and Natural Gas, and highlighted the various government driven innovations and initiatives that have transformed the Indian market. The second was held in Istanbul in June and attracted over

400 delegates from approximately 40 different countries, including senior representatives of the Turkish and global industries. Discussions covered everything from investment opportunities, innovation and the growth of the global Autogas market.



**32nd World
LPG Forum
& European
Congress**

24-27 September 2019 ♀

AMSTERDAM





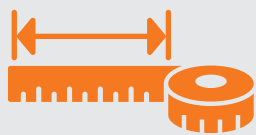
32nd World LPG Forum & European Congress

24-27 September 2019

AMSTERDAM



2,000+
PARTICIPANTS



1,500+
SQM EXHIBITION



25
SPONSORS



11
EXCEPTIONAL ENERGY
STAGE PRESENTATION



6
SESSIONS



FROM
76
COUNTRIES



108
EXHIBITING
COMPANIES



5
SIDE EVENTS



90+
SPEAKERS



800+
BITTERBALLEN
SERVED



"What a pleasure to see the grand variety of industry stakeholders together in Amsterdam for the 32nd annual World LPG Forum – uniquely combined with the European congress. Enjoying the dynamic city in the home country of SHV Energy, and getting great value from the trends and developments showcased at the exhibition and discussed at this combined event. As NOC Chairman, it was an honour to facilitate this successful edition with the members of the National Organising Committee."

Bram Gräber

NOC Chairman for the 32nd World LPG Forum & 2019 European Congress

The WLPGA and Liquid Gas Europe hosted the 32nd World LPG Forum & 2019 European Congress in September 2019 in Amsterdam, the Netherlands, under the theme 'Energy in Transition'. This marks the third combined event of the WLPGA together with the European industry.

Under the theme 'Energy in Transition', the event's focus was on the immediate impact that LPG can have in today's energy mix. James Rockall, CEO & MD of WLPGA said: 'We must not leave people behind and LPG can enable this'. The roundtable discussion, under the same theme, touched on the energy transition and how expectations of all stakeholders involved in the energy sector are evolving. It was generally agreed by all during this session that clear and open discussions about

the full supply chain's environmental impact of various energy options are necessary to ensure an optimal energy transition.

The first keynote address was given by Mr Arthur van Dijk, Commissioner of the King. He highlighted the fact that we must respond to changes and adapt scientific insights. He stated that "the road is long and we do not have much time for the energy transition". In a clear call to action for the industry.

The second keynote address from Mr Allard Castelein, President and CEO of the Port of Rotterdam, focused on smart and connected ports, and the lessons the Port of Rotterdam has taken from digitalisation. Other key themes discussed during the

event included supply and demand in Transition, LPG in the digital world, a communications focused session entitled 'Communications: Reactive to Proactive', and a final, wrap-up session 'From Transition to Destination: What does the future hold?'.

The social events offered excellent networking opportunities to all participants, and the Gala dinner at the Amsterdam Concertgebouw with the launch of LPG Week was an exceptional and memorable event.



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 #WorldLPGForum
#LPGWeek



33rd World LPG Forum

Bringing Energy to life

www.worldlpgforum2020.com

MARKET DEVELOPMENT

Support the developments of LPG markets.





"My three years as chair of the Market Development programme area have given me great insight into the vast and varied opportunities available to our industry. Whether it is maritime, power generation, Autogas or clean cooking, the work of the WLPGA is crucial in highlighting the market potential of these segments. I have been proud to represent Aygaz in leading the Market Development programme area and look forward to continued engagement with WLPGA."

Gökhan Tezel
CEO, AYGAZ
WLPGA Board Member

COOKING FOR LIFE WORKSHOPS

Cooking For Life held three workshops in 2019. The first was held during the 6th Africa LPG Summit 2019 in Dar es Salaam in July 2019. The second was held in November 2019 in Kampala supported by WLPGA member Fenix International. The third Cooking For Life workshop was also held in November during the Nigeria LPG Summit 2019 in Lagos. All three workshops highlighted policy challenges that exist to growing LPG markets while exploring solutions to common problems. They also focused on harnessing good industry practices from around the world to stimulate growth in Africa's most promising markets.



"WLPGA provides a platform to develop partnerships with key stakeholders in the global LPG industry. Its Annual Forums and Regional Summits provide an opportunity for knowledge sharing, deliberations on best innovative practices & exposure to new business opportunities across the globe in LPG industry."

By switching 80 million Indian households using firewood/biomass to LPG as the cooking fuel in just over three years, India has demonstrated to the world how LPG can transform the lives of women from the point of view of health, inclusive growth and also improving the environment and reduced deforestation. As an Industry Council Member, Indian Oil shall continue to collaborate with WLPGA to share and exchange such innovative practices with the global LPG Industry."



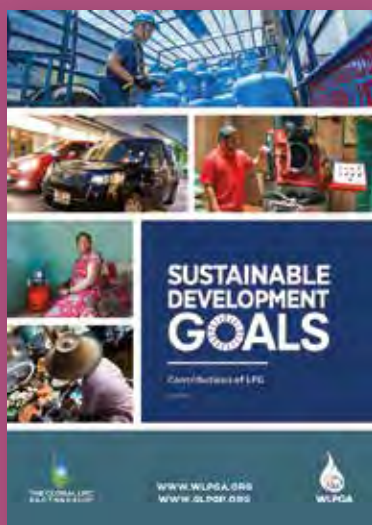
Sunil Mathur
Executive Director (LPG)
Indian Oil Corporation Ltd.
Member Representative, WLPGA Industry Council



LPG FOR DEVELOPMENT SUMMIT (LPG4DEV)

Cooking For life, in cooperation with the Global LPG Partnership (GLPGP), organised the 3rd LPG For Development (LPG4DEV) Summit that was held in September during the World LPG Forum in Amsterdam. The Summit, which featured speakers from Cameroon, Kenya and India as well as numerous

development agencies, focused on the health benefits of switching to LPG. The meeting concluded that clean cooking is now recognised as an urgent area for action with leading international organisations like the World Bank and WHO committed to improving clean fuel access.

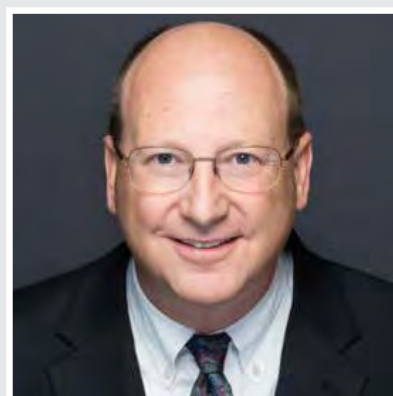


THE CONTRIBUTION OF LPG TO ACHIEVING THE SDGS

The 17 Sustainable Development Goals were launched by the UN in 2016 with a target date for completion of 2030. The SDGs cover social and economic development issues including poverty, hunger, health, education, climate change, gender equality, water, sanitation, energy, urbanisation, environment and social justice (<https://bit.ly/2jHjQmD>).

In 2019 WLPGA launched a project providing an overview summary of the contributions of LPG towards seven of the 17 SDGs. It is not an exhaustive list, but is intended to showcase, via a range of case studies, some applications of LPG in both developing and developed countries, and how they contribute to expediting global achievement of the SDGs by 2030.

"IHS Markit was one of the founding members of the WLPGA through our legacy company Purvin & Gertz, Inc. We have remained members all these years because of the wonderful collaboration we experience with the WLPGA team, and our level of participation has only grown in recent years. I am proud to be an Ambassador for the Women in LPG programme, and we are excited to sponsor WINLPG events at our own IHS Markit LPG conferences. We appreciate the unique perspective the WLPGA provides as speakers at our events, and we know that our insights and analyses are highly valued when we speak at WLPGA meetings around the world. We also value our membership on the WLPGA Industry Council, where our experience working with the full LPG value chain seems particularly appreciated by the other Council members."



Dr Walt Hart
Vice President, Natural Gas Liquids
IHS Markit

MARKET DEVELOPMENT FOR AUTOGAS



With the Netherlands as the country chosen for market-specific intervention in 2019, the WLPGA supported the market through the inaugural international Autogas Day as part of the 32nd World LPG Forum & European Congress.

- Half-day conference on global industry trends, current challenges and opportunities for growth, and case studies at the local level
- 15 speakers from industry, as well as OEMs, and approximately 200 attendees from all over the world
- Local activities in close to 20 countries – including a social media push using #AutogasDay
- Article published in Forbes following the event



PROMOTION

The Guide and Roadmap have been presented at:

- Myanmar Keynote and Q&A (April)
- Poland 6th International Conference (April)
- VVG Annual Meeting (May)
- Colombia 2nd International Conference (August)
- ASEAN LPG Forum Series, Myanmar (November)



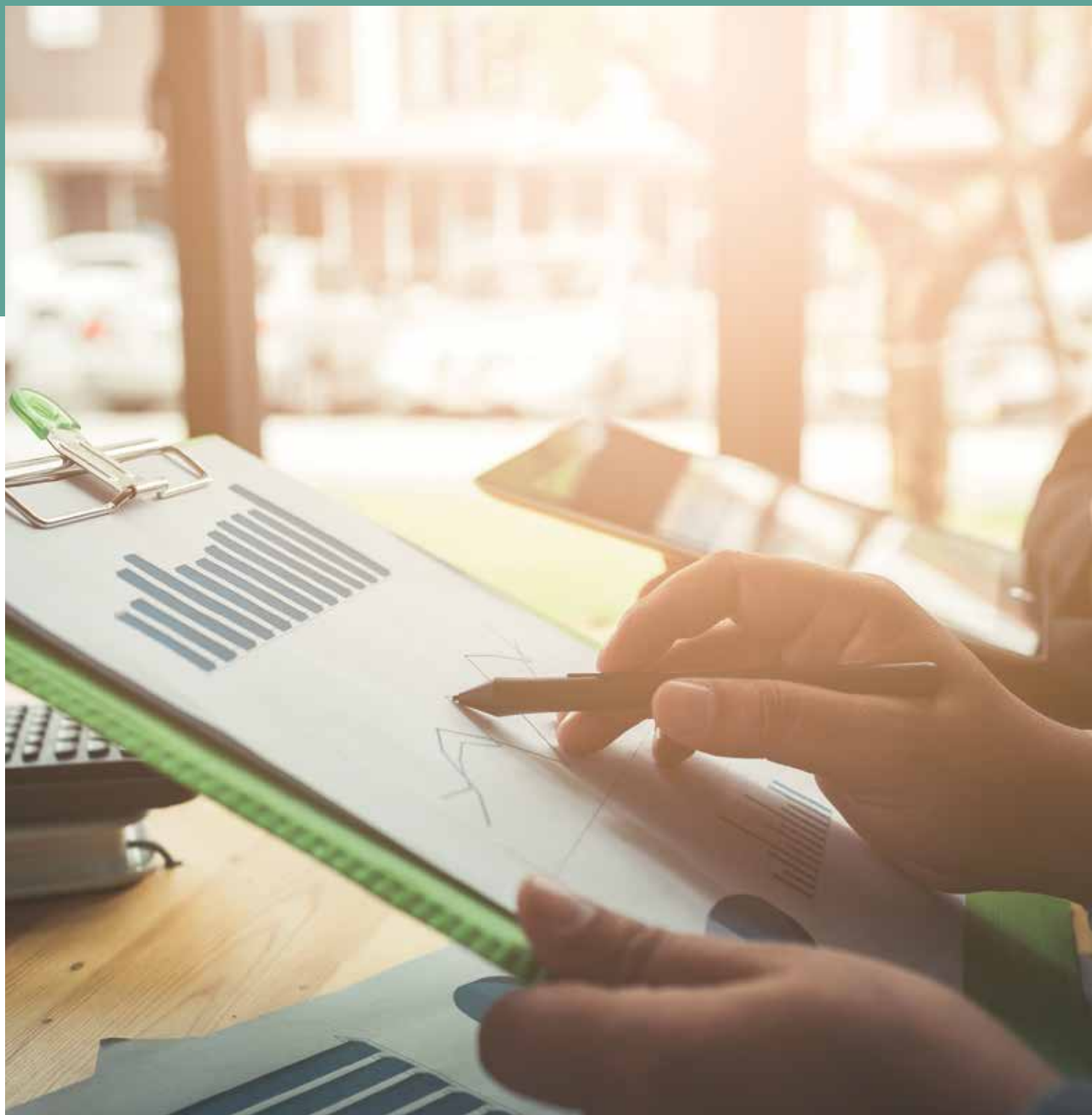
AUTOGAS INCENTIVE POLICIES

WLPGA, in cooperation with Liquid Gas Europe, published the 2019 edition of the Autogas Incentive Policies report. This edition covers 25 markets and provides key information on incentives for LPG and other alternative fuels. Overall this new edition reaffirms the correlation between price and market growth. Financial attractiveness depends on how long the payback period will take for the consumer to be compensated for the upfront cost (vehicle purchase or conversion).

Usually, the consumer is only encouraged to switch if the payback period is less than two or three years (private consumers even less).

STANDARDS

Promote compliance with standards, good business and safety practices.





"It has been a pleasure and a privilege for me to have been Chair of the Standards Goal during the last three years. Maintaining good business practices is a necessity in today's LPG business climate because It's no secret that sharing best practices is an excellent way to improve the performance and productivity of an organisation. Sharing best practices can help organisations fill knowledge gaps, improve efficiency, encourage leadership, and more.

During the past three years Ultragaz has embraced the digital world and we are proud to have led this revolution in the WLPGA. Notably the inaugural start-up WLPGA LPG Challenge '19 was launched this year with spectacular results. Our achievements can be summarised in three short statements: Digital innovation, gender equality and standards harmonisation. We look forward to the next chapter in the WLPGA story with interest and knowing Ultragaz has played its part in the progress to date."

Mauricio Jarovsky
Development Consultant, Ultragaz, Brazil
Chair WLPGA Standards Goal



HNS CONVENTION

WLPGA Director David Tyler and Osamu Uehira, Secretary General of the Japan LP-Gas Association, attended the London International Oil Pollution Compensation Funds (IOPCF) meetings in April and October. The WLPGA has been an official observer to these meetings since 2009 and successfully lobbied for this status to be extended for a further three years until 2021.

The introduction of the Hazardous and Noxious Substances (HNS) Convention becomes ever closer with the agreement of five member states - Canada, Denmark, Norway, South Africa and Turkey - to ratify the convention to date. Several other countries are actively working towards ratification of the Convention. When enacted, the HNS Convention will provide an additional level of



compensation cover to victims of major incidents involving HNS cargoes. LPG is one of those HNS substances that will have its own account, protecting the LPG industry from incidents involving other HNS products.

This engagement with the International Maritime Organization (IMO), through the HNS Convention, creates an opportunity for the WLPGA to work more closely with the IMO. Apart from the HNS Convention, which will impact

the LPG industry once enacted, the role of LPG as a low emission bunker fuel will bring the two organisations much closer together. Engaging with international partners such as the IMO is one of the aims of the WLPGA as it seeks to further improve its external communications with global organisations.



THE INTERNET OF THINGS (IOT)

The IoT continues to have a tremendous impact on our everyday lives and this year a WPLGA working group chaired by André Pimentel of Anova, USA, published an IoT report outlining updates in the IoT space. The report included case studies describing examples as to how the IoT can make the LPG business become smarter, safer and more accessible to non-users of LPG.

In June the WPLGA, supported by PERC (USA) and Anova, launched a brand new start-up competition called WPLGA LPG Challenge '19. Representatives from the global start-up community were given a challenge to invigorate the topics of safety and training within the LPG industry.

Three finalists – Propane Safety App (USA), Augmentaio GmbH (Germany) and DeepSight AI Labs (India) – pitched off against each other during the World LPG Forum in Amsterdam with the audience selecting Augmentaio GmbH as the winner of the €5,000 prize.

The Challenge competition will be repeated in 2020 as part of a new WPLGA programme focusing on digital innovation and how it can improve the business.

During December the WPLGA organised two, one hour, webinars focusing on IoT which attracted nearly 100 participants. This will be repeated next year.



GOOD INDUSTRY PRACTICES WORKSHOPS

Good Industry Practice (GIP) workshops were held during the year in Bangladesh, Nepal, Myanmar and with the UNHCR in Cox's Bazaar.

The topic of good industry practices was also included in visits to several other countries. With global LPG demand growing at around 4% per year, tens of thousands of new personnel are entering the LPG industry for the first time. They all need training to ensure the industry continues to operate in a safe and sustainable manner.

The workshop topics included the important subjects of cylinder management, bulk road transport and cylinder filling as well as LPG Cylinders in the Distribution Channel, the subject of the latest GIP guide.

WLPGA also produces training materials which are available on the WLPGA member-only website complete with trainers' notes.



"While we wrap up 2019 and focus on 2020, we realise that this year was a huge success on the digitisation strategy. On one hand, there were remarkable achievements this year as the launch of the World LPG Challenge and the first publication of the IoT report. On the other hand, this year revealed a growing adoption of digitisation throughout the industry, supported by the increase of digital focused companies that exhibited in the World LPG Forum or by the number of start-ups that applied to the World LPG Challenge. It is clear for the LPG industry that digital efficiency unlocks value through process optimisation while driving decarbonisation with a more efficient use of resources."

André Pimentel
VP, Sales
Anova



UNHCR

There are over 70 million refugees worldwide and many of them are reliant on traditional fuels, such as wood, as their primary energy source for cooking. The WLPGA have formed a partnership with the United Nations Refugee Agency - the UNHCR – to grasp the opportunity for LPG to displace traditional fuels in refugee camps around the world as governments in those countries seek to stop deforestation and improve the lives of the refugees.

One of the WLPGA goals of 2019 was to work more closely with the UNHCR - and the IOM - to ensure that the introduction of LPG into the refugee camps of Bangladesh, where nearly one million people are housed, is done in accordance with WLPGA Good Industry practices and the Cooking For Life objectives.

Following close cooperation with the WLPGA, including a field visit in November to Cox's Bazaar, the

Bangladesh programme to transition refugees away from harmful wood continued with over 90% of the refugees in Cox's Bazar now successfully transitioned to LPG. The programme also receives support from WLPGA members in Bangladesh, Total and Omera.

The UNHCR are now observer members of the WLPGA and both parties continue to seek ways to expand the collaboration programme beyond Bangladesh, especially in other regions including Africa, the Middle East and South America, where refugee populations are high.

The UNHCR recognises the important role that LPG can play as a primary fuel to combat the harmful impact of wood being used in refugee camps for cooking and, after the success of Bangladesh, the WLPGA and UNHCR are now in discussions as to how LPG can be introduced into refugee camps in other parts of the world.

WLPGA GUIDES

The WLPGA produced a Good Industry Practice Guide for LPG Cylinders in the Distribution Channel to add to the suite of Guides already produced. This latest Guide focuses on how LPG cylinders should be managed between the filling plant and the consumer.

The Guide to Good Industry Practice for LPG Cylinders in the Distribution Channel provides advice to all stakeholders to help protect the LPG cylinder in its journey through the distribution channel to the end user.

The WLPGA Guides ensure that the principles used for the training programmes and good industry practice workshops, as part of the knowledge transfer mission, are delivered with consistent messages.

In order to promote the awareness and use of the Guides, short management summaries of all the Guides that have been produced to date are now available in a convenient A5 leaflet. The full library of Guides is available on the WLPGA website.





"UNHCR have been able to seriously address a number of challenges by distributing LPG to refugees and host community households, violence and tensions created around the collection of fire wood is reduced, over 5000ha of forest have been saved, day-to-day improvements in health and quality of life have been instantly introduced."

Paul McCallion
Senior Energy Officer
UNHCR

STANDARDS HARMONISATION

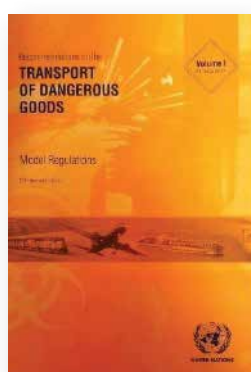


**International
Organization for
Standardization**


The primary focus in 2019 was the work within the technical committee ISO TC 58 (Gas Cylinders), and participation in the international plenary meetings of the committee and its subcommittees. Involvement in the technical committee ISO TC22/SC41 on

standardisation of Autogas components and the filling connector also continued. Other subjects of the same committee, such as DME components standardisation related to its use as vehicle fuel, were also addressed.

At UN level, WLPGA continued its strong involvement and contribution to the work of the UN Model Regulations through the Sub-Committee of Experts on the Transport of Dangerous Goods, including addressing optical differentiation of labels and placards for gases, including LPG.



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@LPGapps



"I am grateful to be a recipient of this auspicious award. I thank my parents who have always believed in me. No work can be accomplished without a team effort and I thank Indian Oil family to give me an opportunity to demonstrate and experiment new ideas in the field. I believe every woman deserves to be the Woman of The Year, we just need to believe in ourselves and dedicate our lives for the betterment of our society. Self-development with hard work, honesty and passion will help us touch the sky with a glory."

Priyanka Shaw
Field Officer,
Indian Oil Corporation and
WINLPG Young Woman
of the Year 2019

WOMEN IN LPG GLOBAL NETWORK (WINLPG)



WLPGA identified that there was a clear opportunity for the global LPG community to take medium and long-term actions that can address the issue of attracting, retaining and developing women to the LPG industry. As the authoritative voice for the global LPG industry, WLPGA is uniquely positioned to develop and implement these actions.

WINLPG was launched in September 2015 and has three pillars of objectives: to support and retain women already in the industry through a network in which women can further their professional

development and access colleagues and mentors; to promote the network via media, within the industry itself and at international events; and in the longer term, to implement measures to educate and attract talent to the LPG industry.

2019 was another exceptionally successful year for WINLPG. We launched a new chapter, welcomed new Ambassadors, enhanced our role model library, continued our newsletter suite, continued our social media outreach and of course held the 2019 Woman of the Year Award.

WOMAN OF THE YEAR AWARD & YOUNG WOMAN OF THE YEAR AWARD

The prestigious Woman of the Year Award is awarded each year to the outstanding individual who has made a significant contribution to the industry, to the cause of diversity, and who has enjoyed unparalleled career success. Woman of the Year 2019 is Pam Indurjeeth, Managing Director, Oryx Oil South Africa (see next page). Pam was appointed Managing Director of Oryx Oil South Africa in 2019 and brings twenty years' experience within the petroleum and LPG industry. The two runners up are Sadhana Chadha, Chief Manager Sales, Hindustan Petroleum Corporation, India; and Maggie Rawling, HSSEQ Advisor North, Calor Gas, UK.

WINLPG also launched the Young Woman of the Year Award. This new award was to recognise women under the age of 30 who have made a contribution to the LPG industry, or who demonstrate significant motivation. The winner of Young Woman of the Year 2019 is Priyanka Shaw, Field Officer, Indian Oil Corporation (see left column). The two runners up are Sophia Haywood, Public Affairs Manager, Liquid Gas UK; and Stephanie Hennen, Trade Show Coordinator, Marshall Excelsior Company, USA.

The competition was tough, and WINLPG warmly congratulates everyone who entered into these awards and we will continue this highly successful initiative going forward.



"It has been my pleasure to act as Global Chair of the Women in LPG Network for the past two years, and to steer the positive advancements that we have been able to make. We have witnessed a positive shift in the perception of diversity in our industry: this is not a 'nice-to-have' network, this is a critical element to drive the success of any business and the LPG industry must not be left behind. We now number over 2,000 members, and the growth of WINLPG supports this business drive. We have also been working to supporting our ever-growing national groups around the world, we have six working chapters, and has been extremely rewarding to see how the network achieves its goals in such diverse geographies. My tenure as Chair draws to a close this year, but the work continues, and I look forward to continuing to be part of this essential organisation."

Paige O'Dell
Operations Support, Amerigas and WINLPG Global Chair



"I am overwhelmed by gratitude and joy. This award has particular significance given the magnitude of being an international platform, amongst so many successful candidates. It is wonderful to take the award back to South Africa, a motivation for other aspiring woman in what's deemed to be a male dominated industry. I thank Oryx Energies for creating an environment that has allowed me to develop my skills at an executive level. Thank you WLPGA, my family and colleagues. A beautiful and memorable milestone to treasure for life."

Pam Indurjeeth
MD, Oryx Energies South Africa and WINLPG Woman of the Year 2019

MORE NATIONAL CHAPTERS



WINLPG also encourages the launch of National Chapters, this enables the network to work in-country and address issues faced in a particular geography. In 2019 WINLPG welcomed Myanmar as the latest national chapter. Myanmar joins Colombia, India, Nigeria, South Africa and the USA, and brings the total of national chapters to six. WINLPG welcomes suggestions for further national chapter locations.

WINLPG is managed by Alison Abbott, Communications Director, WLPGA and Nikki Brown, Global WINLPG Coordinator.



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Communications Director
aabbott@wlpga.org

"As a multinational member of the WLPGA, Equinor is privileged to be a part of the organisation and have a voice on the Industry Council. We support the mission of the WLPGA which includes increasing sustainable growth of LPG demand globally, and improving the lives of millions by providing cleaner fuels to parts of the world that need it most. We also see the benefits of being a member including networking with others throughout the LPG supply chain as well as developing relationships for increased LPG business globally. Lastly, we support the UN Sustainable Development Goals and applaud the WLPGA for their efforts in reaching these ambitions. We look forward to continuing our relationship with the WLPGA in the years to come and hopefully supporting their efforts through our global trading and shipping reach."

Molly Morris
VP Marketing and Trading Products and Liquids
Equinor





KEY SUCCESS FACTORS IN 2019



INNOVATION & TECHNOLOGY

AT THE FOREFRONT OF FUTURE OPPORTUNITIES.





"Innovation in technology, innovation in equipment, innovation in applications is what gives us substance to talk about us being a clean energy. It is no longer good enough to talk that we are cleaner than diesel or gasoline, we need to be talking about being cleaner than electricity, cleaner than hydrogen, and our work on renewable propane is one of the most important things we had been doing this year, together with our work in the very promising areas of marine and small heavy duty engines."

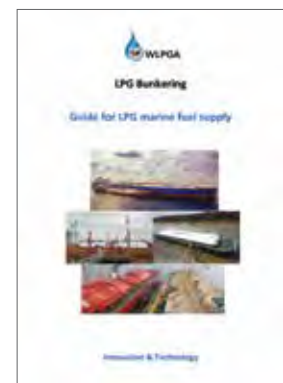
TUCKER PERKINS
President & CEO, PERC and Chair Goal D

LPG AS A MARINE FUEL - THE BUNKERING REPORT

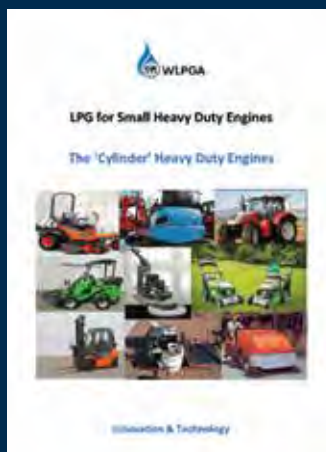
This report focuses on LPG for marine, and in particular on LPG bunkering and it is the WLPGA response to the questions being asked by the shipping industry on availability of LPG bunkering locations. It describes the global picture on LPG bunkering, lists the various LPG bunkering facility models, the main bunkering hubs and the current LPG port terminal infrastructure. It also includes an overview of small pressurised LPG carriers that can play a role in bunkering. It addresses regulatory issues, barriers to development and growth, and also includes a roadmap and recommendations. Key messages coming out of this report are that there is a wide global distribution of LPG storage

and terminal facilities, and that there are already existing LPG bunkering standards set by bulk LPG shipping to build on. The report appeared in numerous international shipping media attracting the interest of the shipping industry.

WLPGA also participated in several marine conferences and events. In addition, a specific LPG as a marine fuel session was organised during the annual Green4Sea event in Athens, where multiple presenters demonstrated the benefits of LPG. In this event WLPGA member MAN Energy Solutions received the Technology Award sponsored by Dorian LPG, for their new LPG fuelled 2-stroke engine.



Rene Sejer Laursen of MAN Energy Solutions receiving the Technology Award from John Lykouris of Dorian LPG.



LPG FOR SMALL HEAVY-DUTY ENGINES & ENVIRONMENTAL PERFORMANCE REPORT

This report focuses on small heavy duty engines, the “cylinder” heavy duty engines. This report comes at a critical time for small cylinder applications which need particular support given the threat of electrics/batteries. The report covers agriculture, commercial, construction, industrial, leisure, recreational and NRMM (non-road mobile machinery) applications. It includes a market scan, small engine and machinery applications, technology development, and lists engines that can easily be converted, and contains a chapter on environmental aspects with real-world emissions comparisons between LPG and petrol, from testing of commercial like-to-like engines available in the market.

BIO-LPG – RENEWABLE LPG, FROM CELLULOSICS AND WASTE, A SCOPING STUDY

The third report is a scoping study on bioLPG, arguably one of the most important subjects for the future of the LPG industry, and is key to help the LPG industry investigate all the possibilities to demonstrate the credibility of meeting at least 50% of the 2050 LPG demand with renewable LPG. This report focuses on second-generation feedstocks, cellulosics and municipal waste, the 9+1 processes, the 130 projects and the 190 possible partners. If the industry wants to move forward, it needs to continue investigating processes, projects and partners that could lead to renewable LPG, and needs to promote the feasibility, value and profitability of renewable LPG to potential partners.

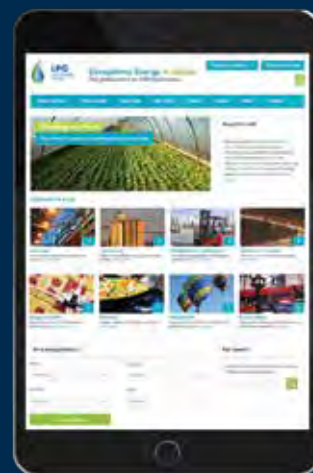


EXCEPTIONAL ENERGY IN ACTION (EEIA) – THE ONLINE LPG APPLICATIONS DIRECTORY

EEIA continues to be developed with new application pages and material and has a very active Twitter presence. Two additional promotional videos were developed to support LPG applications, “Clean Energy, Clean Ironing” and “Tecno Montecarlo, The Autogas Solution” which are available on the LPG apps and WLPGA websites.

Participation in exhibitions and events, as part of promotional activities of LPG applications included, amongst others Bauma 2019, the world’s leading construction machinery exhibition in

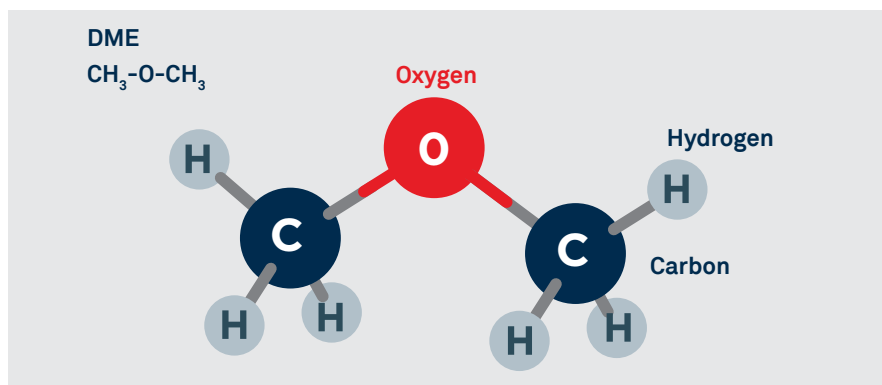
Germany, the UK Construction Week in Birmingham and the 2019 NPGA Southeastern Convention & International Propane Expo. in the USA.



Visit Exceptional Energy in Action at www.lpg-apps.org and follow us on [@LPGapps](https://twitter.com/LPGapps)

DME (AND RDME) IN THE LPG MARKET

DME and rDME were key subjects this year, with WLPGA participating in the IDA DME Workshop in Berlin and various discussions in WLPGA meetings. The positioning of renewable DME (rDME) in the LPG context is important, and will continue to be monitored. De-carbonisation is the key driver and the industry will continue assessing whether LPG/rDME mixed pathways are possible, and under what conditions.



TRAINING

Knowledge transfer remains a key goal of the WLPGA. With global LPG demand growing at 4%, adding over 12 million tons of new product every year, the need for training has never been greater. As well as new LPG consumers who need to be educated about its use, there are tens of thousands of new staff employed by the industry who need to understand the basic properties and characteristics of LPG in order to ensure the product is

stored, distributed and used safely. In 2019 the WLPGA added to the already comprehensive library of training materials which is available for download from the Members’ Area of the WLPGA website. A comprehensive module on cylinder management, coupled with a case study on the importance of stakeholder management, were added to the library in 2019.



GLOBAL TECHNOLOGY CONFERENCE (GTC2019)



GTC is a key event to help identify innovation and new technologies for the LPG industry. Each year, the industry is invited to submit abstracts showcasing some of the most innovative and promising technologies.

GTC2019, held at the time of the World LPG Forum in Amsterdam, saw record submissions and participants, and showcased excellent innovative papers. Submissions topics included LPG direct injection engine for medium duty trucks; soil steaming and heating technology with LPG to kill weeds, seeds, fungus and nematodes without the use of pesticides; and the use of LPG in modular power generation. Topics relating to renewable LPG and

bioLPG were of particular interest, along with the game- changing opportunities for renewable DME & LPG blending. A total of 33 papers were submitted and ten papers were presented.

The prestigious **GTC 2019 INNOVATION AWARD** and also **SUSTAINABLE DEVELOPMENT** category Award, was received by PlasMerica. Their paper ‘Sustainable, renewable propane through energy transformation’ describes how the technology converts methane from a greenhouse gas into renewable LPG. Addressing renewable LPG, this innovative new technology addresses a subject of prime importance to the LPG industry today.

An additional four awards were presented for specific categories:

- **SAFETY:** INERIS for ‘Numerical Simulation and Modelling of Blevé Triggering on a Road Tanker’
- **LPG APPLICATIONS:** AGGREKO for ‘Change through Innovation: The Role of Technology in Encouraging the Use of LPG in Modular Power Generation’
- **LPG OPERATIONS & LOGISTICS:** SMART CYLINDERS for ‘Improving Logistics and Resource Efficiency by Use of IoT’
- **AUTOGAS - ENGINES:** CUMMINS INC for ‘LPG Direct Injection Engine for Medium Duty Trucks’



Winner:
Dennis Manning and Jerry Pellizzon of PlasMerica receiving their award from James Rockall



Contact:
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Technical Director
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@LPGapps



"The UK trade association, Liquid Gas UK, has a long history of successful collaboration with the WLPGA. The wealth of knowledge within member companies and organisations across the globe is invaluable and the WLPGA's strength in enabling the sharing of this vast experience is a recipe for success. A perfect example of how working in partnership can benefit the entire industry is the collaboration that took place to produce the recent report on the "Role of LPG and BioLPG in Europe". Using skills from across the WLPGA's network, this report has provided us with an excellent tool for lobbying, showcasing successful examples of LPG use on a world scale and therefore adding gravitas to our argument. Member organisations and trade associations are only as strong as their members, and as such, we as members need to play our part to ensure the WLPGA delivers for industry, taking the time to shape, input and share ideas. Given the current political landscape with the challenge of climate change and electrification, it is vital for members to work together to ensure LPG and bioLPG remain part of the future energy mix in a decarbonised world, all facilitated by the WLPGA."

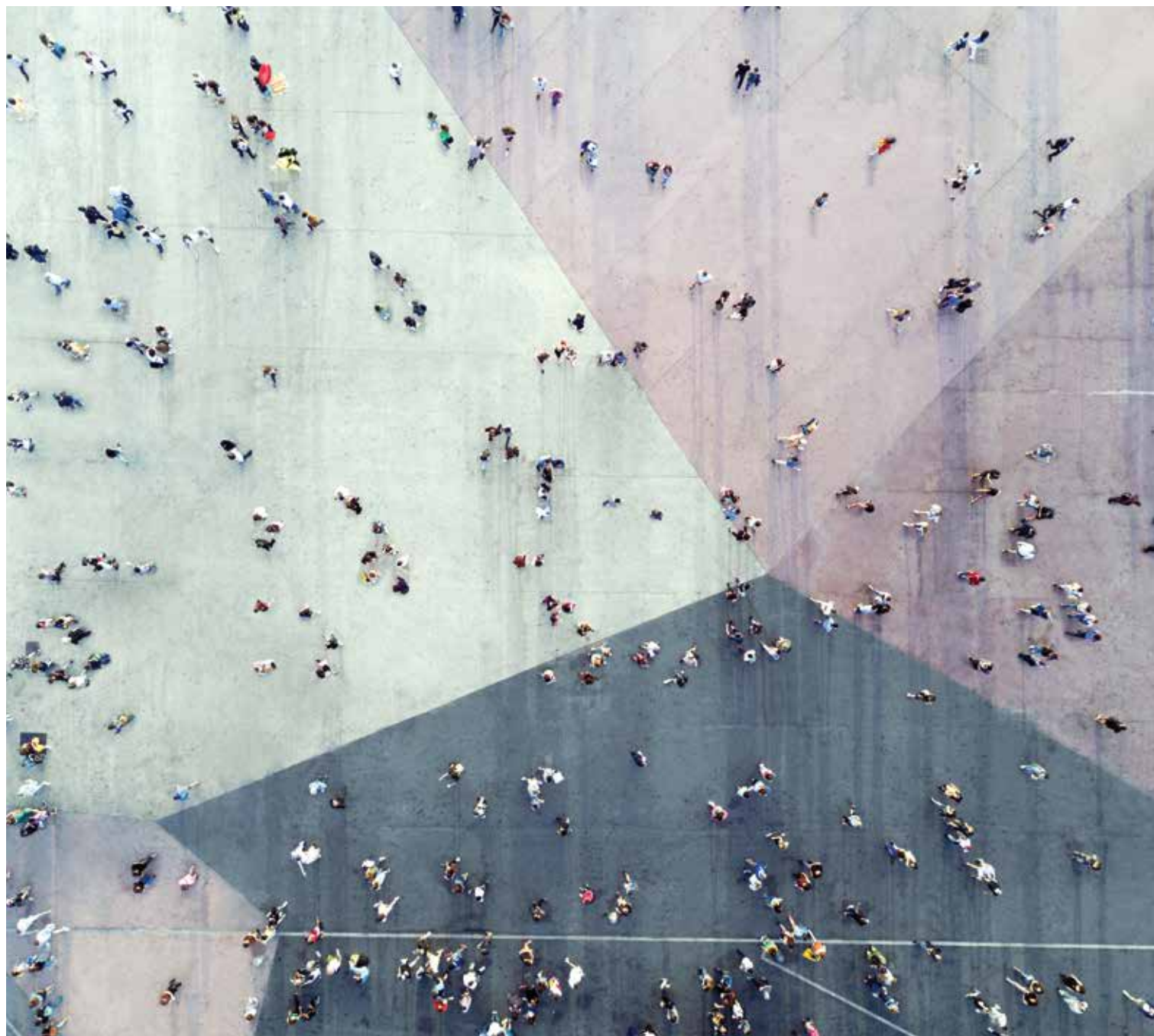


George Webb
Chief Executive
Liquid Gas UK

2019

EVENTS OVERVIEW

The WLPGA organised, or supported, the following industry events around the world during 2019:



JANUARY

San Francisco Energy Dialogue - San Francisco, USA
Argus Americas LPG Summit - Houston, USA

FEBRUARY

WLGA Board, Industry Council & Matrix Day - New Delhi, India
WLPGA Regional Summit - New Delhi, India
WLPGA Good Industry Practice Workshop - Kathmandu, Nepal
Africa Energy Indaba: Solutions for Africa - Johannesburg, South Africa

MARCH

Salon International de l'Automobile - Monaco
South Asia LPG Summit - Dhaka, Bangladesh
International LP Gas Seminar - Tokyo, Japan
Green4Sea - Athens, Greece
AIGLP Congress - Lima, Peru
China LPG Conference - Suzhou, China
Argus Middle East LPG - Abu Dhabi, UAE
IGU Diplomatic Gas Forum - Seoul, South Korea

APRIL

IOPCF HNS Meetings - London, UK
Green Maritime Forum - Hamburg, Germany
LPG Myanmar Summit - Yangon, Myanmar
Polish Association LPG Seminar - Warsaw, Poland
IHS International LPG Seminar - Houston, USA
BAUMA - Munich, Germany
LPG West Africa Conference & Exhibition - Lagos, Nigeria
NPGA South Eastern Convention - Atlanta, USA
Argus LPG Sochi 2019 - Sochi, Russia
PIEA LPG Training - Nairobi, Kenya
Argus West Africa Conference - Lagos, Nigeria
Anniversary of Gas Licuado Espana - Madrid, Spain
IEA Africa Energy Outlook - Paris, France

MAY

UKLPG Annual Conference - Manchester, UK

JUNE

WLPGA Board, Industry Council & Matrix Day - Istanbul, Turkey
WLPGA Regional Summit Turkey 2019 - Istanbul, Turkey
IHS LPG Asia LPG Summit - Hong Kong
Asia Clean Energy Forum - Manila, Philippines

JULY

LPG Tanzania Summit - Dar es Salaam, Tanzania

AUGUST

2nd Colombian LPG Association LPG Conference - Bogota, Colombia

SEPTEMBER

WLPGA Board, Industry Council & Matrix Day - Amsterdam, Netherlands
33rd World LPG Forum & European Congress - Amsterdam, Netherlands
ACEA Summit - Brussels, Belgium

OCTOBER

2019 Thought Leadership Environmental Summit - Baltimore, USA
Asia-Pacific LPG Congress - Ho Chi Minh City, Vietnam
International Green Shipping Summit - Rotterdam, Netherlands
Diversity in Energy Summit - London, UK
IOPCF HNS Meetings - London, UK
New Zealand LPG Association Industry Forum - Christchurch, New Zealand
UK Construction Week - Birmingham, UK

NOVEMBER

Clean Cooking Forum 2019 - Nairobi, Kenya
ASEAN LPG Forum: LPG Myanmar 2019 - Yangon, Myanmar
Argus LPG Leadership Forum - London, UK
LPG Summit and Annual NLPGA Conference - Lagos, Nigeria

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 up to five other Board members. The current Board was elected at the General Assembly of September 2019 in Amsterdam, The Netherlands. 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.



Henry Cubbon
WLPGA President
Managing Director, DCC LPG, Ireland



Sanjiv Singh
WLPGA First Vice-President
Chairman, Indian Oil Corporation, India



David Cavagna
WLPGA Vice-President
CEO, Cavagna Group,
Italy



Blaise Edja
WLPGA Vice-President
Downstream Manager West Africa,
LPG Oryx Energies, Switzerland



Bram Gräber
WLPGA Vice-President
CEO, SHV Energy,
The Netherlands



Roger Perreault
WLPGA Treasurer
Executive Vice President, Global
LPG, UGI Corporation/AmeriGas,
USA



Tabajara Bertelli Costa
WLPGA Board Member
CEO, Ultragaz, Brazil



Gökhan Tezel
WLPGA Board Member
CEO, Aygaz, A.S, Turkey



Martin Ackermann
WLPGA Board Member
CEO, BW LPG,
Singapore



Claude Le Damany
WLPGA Board Member
Vice President LPG, Total,
France



Sakae Yoshida
WLPGA Board Member
Managing Director,
Japan LP Gas Association, Japan

INDUSTRY COUNCIL

The WLPGA 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 Industry 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.



THE WLPGA TEAM



James Rockall
CEO & Managing Director



Michael Kelly
Deputy Managing Director
& Director of Market Development



Nikos Xydas
Technical Director



Alison Abbott
Marketing & Communications
Director



Esther Assous
Events Director



Filipa Rio
Sustainable Mobility Director



Audrey Ginsz
Office Manager &
Member Relations Manager



Camille Pieron
Digital Communications
Manager



Myriam Brasseur
Communications Assistant

HOW TO KEEP UP TO DATE WITH WLPGA

WLPGA produces a wealth of industry-leading reports, case studies and related materials, much of this is freely available to the global LPG community. So how and where can you access all this data?

Here we explain the various LPG platforms, what is available where, and for whom:



www.wlpga.org

The WLPGA website is the main platform to learn about LPG as an Exceptional Energy, the association, its main activities and campaigns, and freely access all publicly available reports and videos.



Exceptional Energy in Action
The global portal on LPG Applications

www.lpg-apps.org

LPG-Apps is the unique online database cataloguing the hundreds of applications for LPG around the world.

autogas

www.auto-gas.net

Everything you need to know about Autogas, including the latest WLPGA reports and case studies for free download.



www.extranet.wlpga.org

The Members' Area is a password protected portal that is available to anyone who works for a member organisation. Here you can find specific technical reports, member only reports, minutes from WLPGA internal meetings (Industry Council, Association Executives Meetings, General Assembly, Member Engagement Meetings), the members directory, a shareable photo library to help illustrate your own collateral, discounts for global LPG events and more. For more information, contact aginsz@wlpga.org

MyWLPGA

www.mywlpga.wlpga.org/login

This specific portal is housed within the Members' Area and is for member administration contacts. Here you can register for WLPGA internal meetings, update your organisation details, check your fee payment status and pay your membership fees online. Access requires another password and one access is given to each member so that there is one single admin user. For more information, contact aginsz@wlpga.org



WLPGA SOCIAL MEDIA

Follow us, connect with us, hear the latest news and interact through our various social media activity. Find us on these major platforms:



@WorldLPGAssoc



WorldLPGAssociation



worldlpgassociation



World LPG Association



WorldLPG

The logo consists of the text 'LPG' in a large, bold, white sans-serif font, with 'WEEK' in a smaller, white sans-serif font directly below it. The text is contained within a white rectangular border that is slightly tilted to the right.

LPG
WEEK

**33rd World
LPG Forum**

DUBAI

2 - 4 November 2020

Bringing Energy to Life



WLPGA IS PROUD
TO ANNOUNCE THAT
THE 33RD WORLD LPG FORUM
WILL BE HOSTED BY ENOC GROUP.

#SeeYouInDubai

CONTACTS & DETAILS:

33rd World LPG Forum

Organising Secretariat:

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92300 Levallois-Perret -France
www.worldlpgforum2020.com
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Exhibition, Sponsorship & Advertising Sales:

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Registration, Accommodation and Invitation Letters for Visa Appliances:

registration@worldlpgforum2020.com

Your Forum contact at the WLPGA:

Contact: Mrs Esther Assous
eassous@wlpga.org

The host organisers have entrusted
MCI France with the general organization
and logistics of the exhibition
for the 33rd World LPG Forum.

www.worldlpgforum2020.com

www.lpgweek.com





WLPGA



LPG
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