



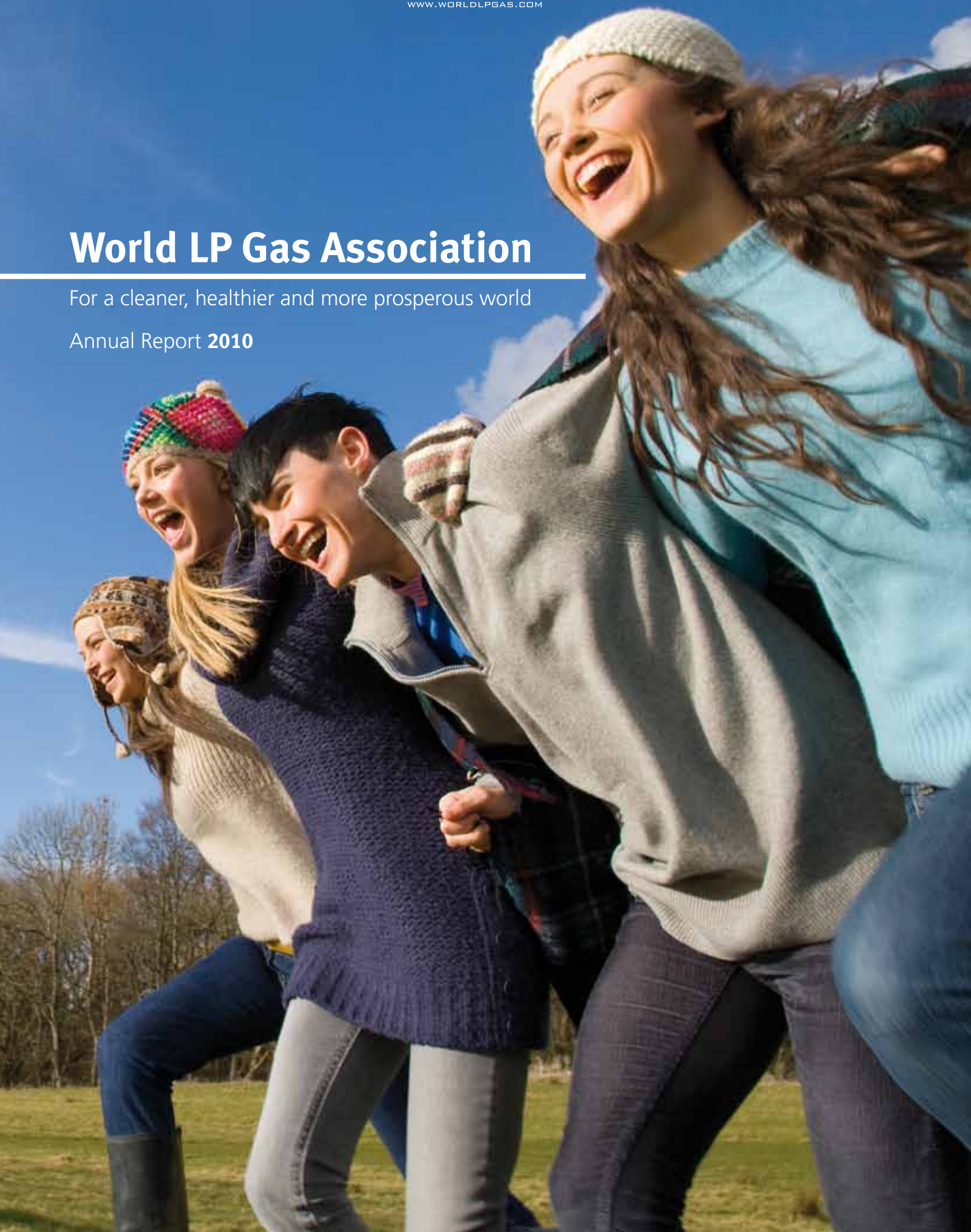
WORLD LP GAS ASSOCIATION

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# World LP Gas Association

For a cleaner, healthier and more prosperous world

Annual Report **2010**



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ASOCIACION IBEROAMERICANA DE GLP | ASSOGASLIQUIDI | ASTOMOS ENERGY CORPORATION | AYGAS A.S.  
| BABA ENERGY | BHARAT PETROLEUM | BLACKMER | BP LPG | BUTAGAZ S.A.S | BUTANGAS | C.F.B.P | CAISSE DE  
STABILISATION DES PRIX DES HYDROCARBURES (C.S.P.H.) | CALOR GAS LIMITED | CAMARA DE EMPRESAS ARGENTINAS  
DE GAS LICUADO | CAMARA URUGUYA DE GAS LICUADO | CAVAGNA GROUP SPA | CIA DE GAS DE TIJUANA, SA  
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| CORKEN INC. | COSMO PETROLEUM GAS | DATA MONITOR PLC | DEUTSCHER VERBAND FLÜSSIGGAS |  
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GAS L.L.C. | EMPRESAS LIPIGAS S.A. | ENERGY TRANSPORTATION GROUP INC. | FERRELLGAS | FINNGAS GMBH |  
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RENOUVELABLES, ENVIRONNEMENT ET SOLIDARITÉS | GILBARCO VEEDER-ROOT | GOK REGLER - UND ARMATUREN  
GMBH & CO. KG | HEDON-HOUSEHOLD ENERGY NETWORK | HIGH PRESSURE GAS SAFETY INSTITUTE | HINDUSTAN  
PETROLEUM | INDIAN AUTO LPG COALITION | INDIAN OIL CORPORATION | INTEGRATED GAS TECHNOLOGIES |  
INTERNATIONAL CHAMBER OF COMMERCE | INTERNATIONAL FERTILISER INDUSTRY ASSOCIATION | IPRAGAZ | ITRON  
(ACTARIS) | IWATANI INTERNATIONAL CORP. | JAPAN GAS ENERGY CORPORATION | JAPAN L.P. GAS SALES ASSOCIATION  
| JAPAN LP-GAS ASSOCIATION | JORDAN PETROLEUM REFINERY | JX NIPPON OIL & ENERGY CORPORATION |  
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PETROLEUM CORPORATION | LAMPOGAS SPA | LAUGFS GAS (PVT) LTD | LIQUIGAS | LIQUIGAS DISTRIBUIDORA  
| LPG ASSOCIATION OF PAKISTAN | LPG AUSTRALIA | LPG CENTER OF JAPAN | LPG INDUSTRY ASSOCIATION, INC  
| MALDIVE GAS PVT LTD | MANGELS INDUSTRIAL | MAURIA UDYOG LIMITED | METAL MATE CO. LTD | MILANGAZ |  
MITSUI MARUBENI LIQUEFIED GAS CO. LTD (MLG) | MOGAZ A.S. | NAFTAL | NATGAZ | NATIONAL GAS COMPANY (SAOG)  
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NPGA | OIL AND GAS REGULATORY AUTHORITY | OIL INDUSTRY SAFETY DIRECTORATE - GOVERNMENT OF INDIA | OMAL SPA  
| ORIGIN ENERGY | ORLEN GAZ | ORYX SUPPLY & STORAGE SA | PAZGAS | PERTAMINA / PT PERTAMINA (PERSERO) |  
PETREDEC SERVICES (ASIA) PTD LTD | PETROLEUM FEDERATION OF INDIA | PETRONAS | PRIMAGAZ | PRINS AUTOGAS  
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| SONATRACH | STRATEGIC ENERGY LIMITED | SUPERGAS CO. LTD. | TASWEEQ QATAR INTERNATIONAL PETROLEUM  
MARKETING COMPANY | THE LP GAS SAFETY ASSOCIATION OF SOUTHERN AFRICA | THE PARTNERING INITIATIVE |  
THOMAS AQUINAS FOUNDATION | TOTAL ENERGY | TOTAL | TOTALGAZ | TOTSA | TOUCHSTAR TECHNOLOGIES |  
TRINITY INDUSTRIES DE MEXICO | TURKISH LP GAS ASSOCIATION | TYCZKA ENERGIE GMBH & CO. KGAA |  
UGI CORPORATION | UKLPG | ULTRAGAZ S/A | VIETNAM GAS ASSOCIATION | WESFARMERS ENERGY | WORTHINGTON  
CYLINDER CORPORATION | YACHIYO INDUSTRY CO LTD

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# 2010 in Brief

## Goals

In 2010, a variety of activities around the world ensured that WLPGA goals were fulfilled.

**The WLPGA:**

- Demonstrated the benefits of LP Gas and positioned it as clean energy for a low carbon world.
- Created the environment to develop and sustain LP Gas markets.
- Stimulated innovation.
- Promoted compliance with health, safety and environment standards and good business practices.
- Facilitated and drove communication among all stakeholders.

## Outreach, Lobbying & Communication

Through outreach, lobbying and communication activities, the WLPGA significantly increased worldwide awareness about LP Gas. The global launch of the Exceptional Energy brand, high level events, partnerships with international organisations, and targeted and topical publications were valuable tools used to achieve this success.

## Exceptional Energy

2010 was a spectacular year for the WLPGA, with the launch of its 'Exceptional Energy' brand. Exceptional Energy has already proved to be a valuable communications tool and unique platform enabling the entire industry to speak with one voice.

## Market Development & Support

In 2010 the WLPGA increased its influence within global programmes, increasing its presence in fast-growing markets.

## Climate Change Working Group

Climate change is a crucial issue and reality in today's world. At the UNFCCC Climate Change Conference in Cancun, Mexico, the WLPGA not only represented the entire industry but also voiced its solutions to this problem.

## Global Autogas Industry Network (GAIN)

Autogas has become an increasingly popular transport fuel in 2010. The WLPGA activities within the Global Autogas Industry Network substantially contributed to this result.

## Global Technology Network (GLOTEC)

In 2010, the Global Technology Network gave the LP Gas industry an invaluable opportunity to exchange information on technology and innovation and to tackle the crucial issue of global standards harmonisation.

## World LP Gas Forum

Again in 2010, the World LP Gas Forum attracted widespread interest, with more than 3,000 stakeholders present in Madrid and high-level participants publicly supporting LP Gas.

## WLPGA Strategic Plan 2011 - 2013

In 2010 the WLPGA started an in-depth strategic review to ensure recognition of the contribution that LP Gas can have across all markets. It will be essential to address the role of LP Gas in climate change mitigation and increase its contribution to cleaner air.



World Health Organisation estimates show that if

50%

of the people in the world currently cooking with solid fuels switch to LP Gas, it can provide health and productivity gains of close to a trillion dollars over the next decade.

# Foreword from the President



**Ramón de Luis Serrano**

WPLGA President and CEO, Repsol Butano.  
Executive Director LPG Global, Repsol

**It is with great pleasure that I present the 2010 Annual Report of the World LP Gas Association (WPLGA) as newly elected President.**

In 2010, the LP Gas industry has been characterised by stability and it surmounted the large fluctuations previously experienced in 2008 and 2009. A remarkable achievement in an era and world still affected by the global financial crisis.

Important strategic steps have been taken to enhance the WPLGA's efficiency. For instance, the WPLGA Strategic Plan 2010-2013 has been defined and our Vision and Mission have been revised. The outcomes of the Global Coordination Working Group were instrumental in this process.

**“In 2010, the LP Gas industry has been characterised by stability and it surmounted the large fluctuations previously experienced in 2008 and 2009. A remarkable achievement in an era and world still affected by the global financial crisis.”**

As a result, the WPLGA has not only become increasingly efficient, it also became the authoritative global voice for LP Gas. At the same time, solid foundations have been built to operate in a more coordinated fashion and to increase its presence and effectiveness in this energetic world in the years to come.



# 80%

of US farmers use  
LP Gas for heating,  
cooking or agricultural  
applications.



# Foreword from the CEO and Managing Director



**James Rockall**  
WLPGA CEO and Managing Director

**In 2010, the world of LP Gas changed. No longer are we simply a grouping of thousands of companies sharing a common product. Over this past year, we began to unite the industry under a single branding – Exceptional Energy; and things will never be the same again.**

Exceptional Energy is more than a convenient tag line. It covers the unique and hugely beneficial characteristics of LP Gas; but it also represents the recognition that our industry, from producer to distributor, needs to work together to realise common goals in the face of growing competition from other energy carriers.

**“Exceptional Energy is more than a convenient tag line. It covers the unique and hugely beneficial characteristics of LP Gas; but it also represents the recognition that our industry, from producer to distributor needs to work together to realise common goals in the face of growing competition from other energy carriers.”**

During 2010 we defined our strategy for the coming three years. It is a strategy that is very much focussed on ensuring recognition of the contribution that LP Gas can have across all markets, whether developed or developing. It is a strategy that will leverage the role that LP Gas has in mitigating climate change as well as contributing to cleaner air. Greater cooperation between organisations will be encouraged so that we can share the best practices that exist, while striving to eliminate bad practices. We shall see new groups join our membership as we open up to inter-governmental organisations, NGO's and national government representatives. We intend our voice to be heard and therefore if you have a stake in this industry or if you have a role to play in ensuring supply of clean modern energy, please contact me and see how you can get involved. Together we will ensure that communities worldwide can benefit from the value of LP Gas, Exceptional Energy.

*J. Rockall*



Over

30

million European homes and businesses, mainly in rural areas, do not have access to the natural gas grid. For these households, LP Gas offers a low carbon solution for heating and cooking.

# About the Industry

## What is LP Gas?



LP Gas (Liquefied Petroleum Gas) is a derivative of natural gas processing and crude oil refining. LP Gas is therefore a by-product of the production of natural gas (around 53%) and of crude oil (around 47%).

LP Gas has unique properties that make it the ideal energy source for a myriad of applications. It is portable, widely available and cleaner than traditional fuels. LP Gas emits about 20% less CO<sub>2</sub> than heating oil and 50% less than coal. LP Gas also helps to reduce Black Carbon and Particulate Matter emissions, which not only compromise both outdoor and indoor air quality, but can cause serious health problems.

## Where is it used?

LP Gas is used in commercial business, industry, transportation, farming, power generation, cooking, heating and for recreational purposes. In 2010, the domestic sector remained the most popular application for LP Gas: domestic heating and cooking accounts for 47% of global demand. LP Gas is also a solution for highly efficient distributed power generation in areas cut off from the natural gas grid. Agricultural uses also represent an interesting market for LP Gas: where it is used in a number of applications ranging from thermal desiccation, to crop-drying, fuelling of farm vehicles and insect repellent. In addition, Autogas (LP Gas used as a transport fuel) is fast growing, especially in countries like Italy, Poland, Turkey and also South Korea, where LP Gas cars account for as much as 15% of the national car fleet. On a more lighthearted note, LP Gas is used to fuel the Olympic flame and allows people to enjoy amazing scenery from the air by fuelling hot air balloons...

## Leading Markets

LP Gas sales volumes reached 240.7 million tonnes in 2009. Globally, the Asia-Pacific region is the leading market for LP Gas. It is also growing fast, in particular because of demand from China and India. The Indian market grew by 6.4% in 2009, driven by a 32% expansion of the Autogas market. In 2009, LP Gas consumption recorded a 7.8% increase in China and the Chinese LP Gas vehicle fleet grew by 25%. China now accounts for 10% of the world's LP Gas consumption, second only to the United States (22.5%).

On the production side, the industry recorded a global increase of 25.6% since 1999. This growth was driven mainly by production in the Middle East (+47%) and the Asia-Pacific region (+66%). The United States remains the largest single producer, with 20% of the global market.

## Value of LP Gas

The LP Gas industry is truly global. It supports, directly and indirectly, over 2 million jobs around the world to supply a product available in every single country. Up to 3 billion people use LP Gas for one application or another, which makes it a very popular energy source for half the world's population. Furthermore, the industry has a significant infrastructure in place, for instance, if put side by side, the one billion familiar LP Gas cylinders in circulation would form an uninterrupted chain around the globe about 8 times!



# 90%

of Guangzhou's 8,000 buses use LP Gas  
as do 100% of the city's 18,000 taxis.

# About the WLPGA Vision & Mission

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



**James Lau**  
Executive Director, Elpiji Malaysia

“As an LP Gas equipment manufacturer that caters to the global market, not only does the WLPGA provide us with an efficient platform to showcase our product range, it also gives us the valuable opportunity to promote worthy causes that improve our environment.”

## Vision

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

## Mission

- Demonstrate the benefits of LP Gas and position it as clean energy for a low carbon world.
- Create the environment to develop and sustain LP Gas markets.
- Identify and stimulate innovation.
- Promote compliance with health, safety and environment standards and good business practices.
- Facilitate and drive communication among all stakeholders.

# Benefits to Members

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

## Our Proposition

The WLPGA provides its members with a wide, yet targeted, range of benefits.



“LP Gas can provide a safer, cleaner and more affordable cooking alternative for the more than 2 billion people currently using traditional biomass fuels. E+Co has invested in more than 12 African-based LP Gas enterprises as part of its commitment to this ‘cleaner’ energy alternative.”

**Christine Eibs Singer**  
Co-Founder and CEO, E+Co



## Network

The WLPGA is a growing network with almost 200 members operating in more than 90 countries. It represents the interests of private and public companies from the entire LP Gas value chain under one umbrella and since 2010 it also includes Observer Members from inter-governmental organisations, NGO's and national government representatives.

### ■ Access

Representing every sector of the LP Gas industry, ranging from producers to equipment manufacturers, to governmental representatives and NGO's.

### ■ Networking

With members strategically located around the world and by organising regular regional and global events, the WLPGA is an effective platform for members to meet, exchange information and experiences and explore new business opportunities in both mature and developing LP Gas markets.

### ■ Annual World LP Gas Forum

WLPGA's key networking event is the World LP Gas Forum, a premier global conference and exhibition on LP Gas, attended every year by top executives of LP Gas companies from all around the world. The Forum is the major annual event where the industry communicates about global LP Gas business developments and issues relevant to both the industry and outside partners. Members are given significantly discounted rates on conference registration fees and exhibition booth rental, receive preferential treatment at the Forum, and take full advantage of the excellent opportunity to network with other members at the yearly Members' Dinner.

### ■ Worldwide Action

The association's broad network of members and external relations, together with its ability as an independent organisation to unite the various interests of the worldwide LP Gas industry, result in efficient and effective worldwide action on key issues. Our Paris-based operation is complemented by a powerful global membership.

## Information

The WLPGA provides a platform for the exchange of best practices and statistics among its members. Additionally, it promotes LP Gas and its industry on a continuous and consistent basis.

### ■ Member Queries & Business Contacts for Members

This permanent service is provided by the WLPGA as an international trade association. Queries cover topics such 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

A member directory with full contact details is issued annually.

### ■ Members-only Reports

The WLPGA publishes reports for exclusive distribution to its members.

### ■ Members-only Web Site Database & Resource Centre

The WLPGA provides a members-only, password-protected, customer-oriented web service for member organisations and their staff – an on-line information system, with data, reports and links added regularly.

### ■ Industry Toolkit

Ready-made Exceptional Energy communication materials on the benefits of LP Gas, including fact sheets, Q&A, resource centre, facts & figures, artwork and media room provide excellent messaging tools for WLPGA members.



**Adebayo Ibirogba**

Group General Manager, Greenfield Refineries,  
Engineering & Technology Directorate,  
Nigerian National Petroleum Corporation

“The first-ever All-Africa LP Gas Summit was held in Nigeria in March 2009. This summit assisted the West African Region to re-evaluate our approach to the growth and development of the regional LP Gas Markets. More specifically, it created a platform for Nigeria to target a ten-fold increase in annual LP Gas consumption in Nigeria by 2015, from the current 100,000 tonnes to 1 Million tonnes. With the support of the WLPGA, we are currently working to achieve this increase, in a commercially sustainable manner and in accordance with good business and safety practices.”

#### ■ 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 bimonthly Autogas Update is a key example.

#### ■ Global LP Gas Statistics

Members receive one free copy (and discounted additional copies) of the LP Gas Statistical Review (value 3,000 USD), the highly referenced annual publication used throughout the industry, providing LP Gas production and consumption data for more than 80 countries.

### Education

Investing in both knowledge building among members and in educating key stakeholders are an important part of the WLPGA's services on a continuous and consistent basis.

#### ■ Workshops & Training Courses

The WLPGA regularly organises interactive meetings between technical experts, members and key stakeholders to demonstrate the benefits of LP Gas. Members often participate at special rates.

#### ■ Exceptional Energy Brand

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

#### ■ Special Projects for Members

Coordination of specific custom-made projects for a consortium of at least three members.

#### ■ Publications

Members get one free copy of all new publications and benefit from discounted prices on additional copies.

### 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. Granted Special Consultative Status with the United Nations



“The WLPGA has proved to be an extremely effective partner in our work on examining the central role that LP Gas plays, and could play in the future, in addressing global energy challenges – not least the urgent need to address energy poverty in least developed countries.”

**Trevor Morgan**  
Senior Economist, International Energy Agency



Economic and Social Council in 1989, the WLPGA has since developed partnerships with several major international institutions including, the World Bank, the United Nations and the International Energy Agency.

### ■ Global Leadership Position

The diversity in the WLPGA's members allows an effective full industry representation, where members benefit from a powerful leadership position.

### ■ Member Networks

The Global Autogas Industry Network (GAIN) co-ordinates efforts of the Autogas community.

The Global Technology Network (GLOTEC) supports innovation, advances understanding of developments in research and explores ways to use technology to expand LP Gas markets and prosperity.

The Climate Change Working Group (CCWG) represents the industry in international negotiations and ensures that the LP Gas industry has a coherent and consistent presence in one of the most important issues of our time.

WLPGA membership brings access to these networks and thus to a large resource of experts in all markets across the globe. It also facilitates exchange of good practices and experiences amongst members with common goals.

## Credibility

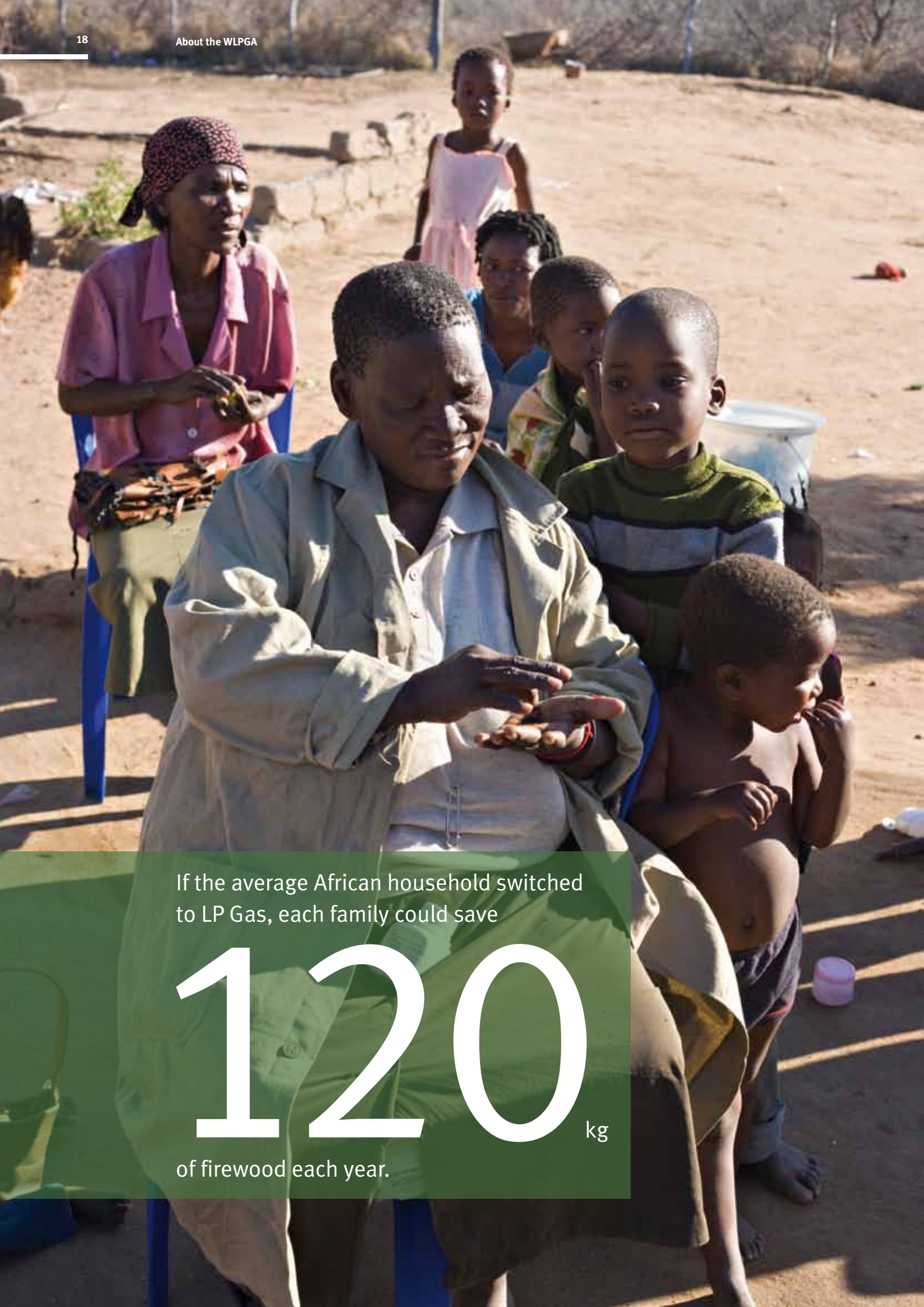
The geographical spread and diversity of the WLPGA's membership makes the association a representative, trusted and logical partner in international discussions.

- The WLPGA was officially granted Consultative Status with the United Nations Economic and Social Council in 1989.
- Publications such as its Annual Statistical Review have become LP Gas industry references.



**Suyash Gupta**  
General Secretary, Indian Auto LP Gas Coalition

"LP Gas continues to clearly be the accepted solution for several applications. Yet markets differ with a country's economy, climate and by and large its success depends hugely on government. In this regard, the World LP Gas Association's endeavor to engage with governments through in-country associations and facilitate proactive association level cooperation has been commendable. The WLPGA website continues to be informative and the theme 'Exceptional Energy' has been communicated effectively. With a committed team and its initiatives to develop customised packages for, and with, its members to make a compelling case for LP Gas, globally and very importantly locally, would have a certain impact."

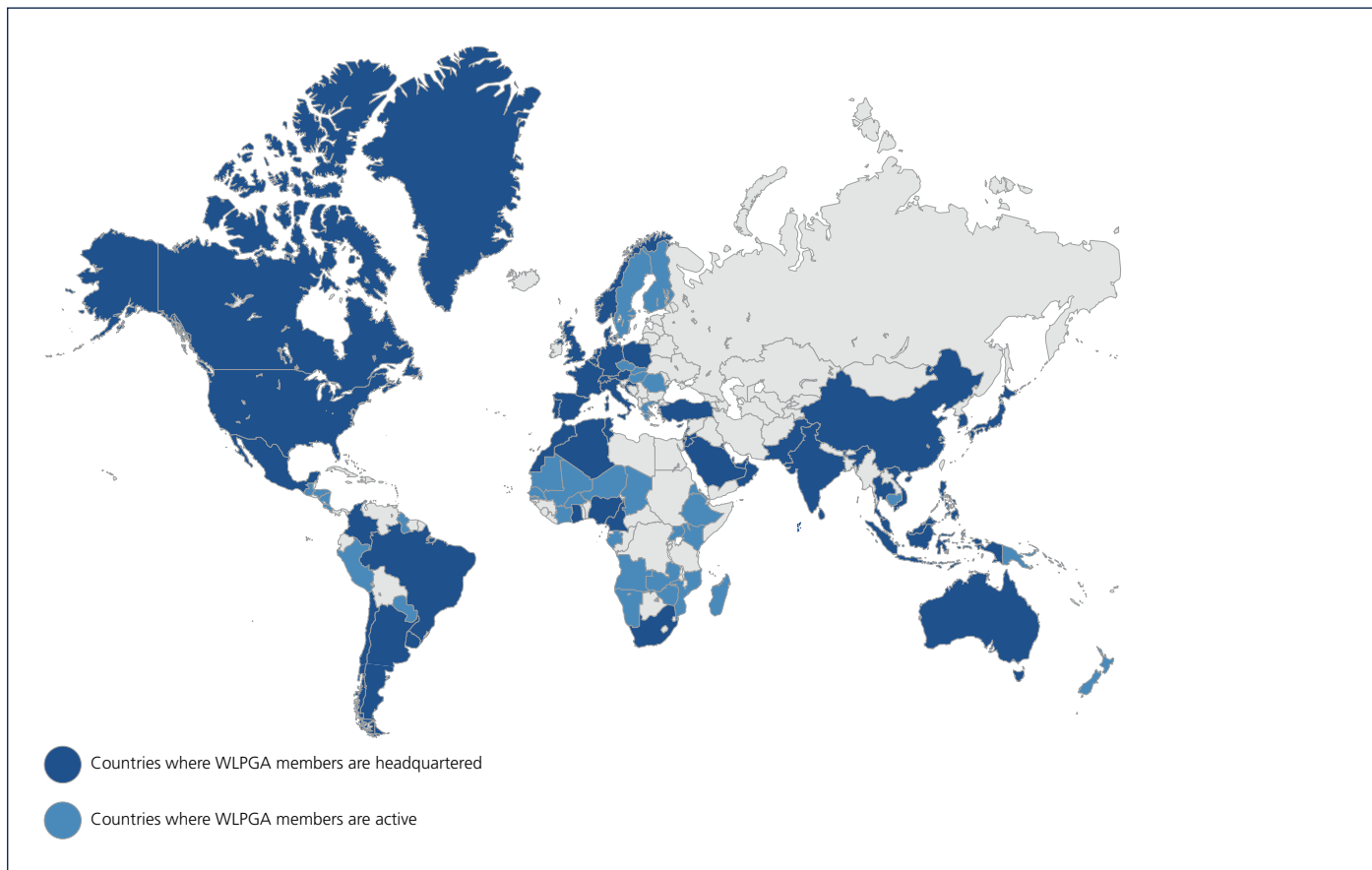
A woman in a white lab coat is the central figure, holding a small object in her hands. She is surrounded by several children in a dry, outdoor setting. The background shows a dirt ground and some sparse vegetation. The overall scene suggests a community health or educational activity.

If the average African household switched to LP Gas, each family could save

**120** kg

of firewood each year.

# Membership 2010



## In 2010, the WPLGA welcomed the following new members:

**Argus** UK  
**Camara Uruguya de Gas Licuado** Uruguay  
**Citco Gmbh** Austria  
**Data Monitor plc** UK  
**Elpiji (M) SDN. BHD.** Malaysia  
**Empresas Lipigas S.A.** Chile  
**Gas Orient** Lebanon  
**Integrated Gas Technologies** Denmark  
**Laugfs Gas (PVT) Ltd** Sri Lanka  
**Oil and Gas Regulatory Authority** Pakistan  
**Omali Spa** Italy  
**Touchstar Technologies** UK

## In 2010, the WPLGA welcomed the following new observer members:

**Clean Air Initiative Asia** Philippines  
**Caisse de Stabilisation des Prix des Hydrocarbures (CSPH)** Cameroon  
**E + Co** USA  
**Environment Business Australia** Australia  
**GERES (Groupe Energies Renouvelables, Environnement et Solidarités)** France  
**Hedon** UK  
**The Partnering Initiative, International Business Leaders Forum** UK  
**International Chamber of Commerce** France  
**International Fertilizer Industry Association** France  
**Partnership for Clean Indoor Air** USA  
**Thomas Aquinas Foundation** Ghana

India has a LP Gas  
penetration rate of

# 88%

in urban areas and  
19.6% in rural areas  
which offers a  
massive opportunity  
for the industry.



# Finance 2010

Income	2009 (k€)	2010* (k€)
Membership	995	1058
Other Revenue	78	41
<b>Total WLPGA Income</b>	1073	1099
<b>Total Expenses</b>	1026	1226
<b>Total Net Income</b>	47	** -127

\* prior to final audit

\*\* includes extra charge for Exceptional Energy Project



**Davide Cavagna**  
CEO, Cavagna Group

## An Exceptional Cooperation

"Cavagna Group, leading manufacturer of LP Gas equipment with over 50 years of experience on the world market, is proud to be one of the most active members of the WLPGA.

Over the past years we have strongly supported the LP Gas industry through the development and introduction of new technologies and innovative applications. 2010, more than ever, was characterised by an exceptional support on behalf of the Association with proactive interventions of our Group in many of its events and dedicated workshops such as GAIN (Global Autogas Industry Network) and GLOTEC (Global Technology Network).

We expect that both these networks through the exchange of information amongst its participants, support industry growth through the promotion of new technologies bringing innovative ideas.

We strongly believe that the participation of equipment manufacturers such as ourselves in both these networks is appreciated by the association and is said to be valuable, since the LP Gas market requires innovation and technology to grow and prosper.

I personally, feel honoured to be part of the Industry Council – such an exceptional group of dedicated, high industry ranking individuals who are capable of giving that extra added value which is necessary to stimulate and promote the growth of our industry.

We will continue to support technology and innovative products within the Association's Working Groups in the years to come, because we strongly believe that also through our contribution the LP Gas industry can attain exceptional results."

# WLPGA Activity 2010 Goals

## Status of 2010 goals

### Goal A: Demonstrate the benefits of LP Gas and position it as clean energy for a low carbon world

Description	Targets			
	April 1st	July 1st	October 1st	January 1st
1 Position LP Gas as a low-carbon fuel though ensuring LP Gas official recognition in COP16 negotiations	1st CCWG meeting <input checked="" type="checkbox"/>		2nd CCWG meeting <input checked="" type="checkbox"/>	Ensure LP Gas official recognition in COP16 negotiations <input checked="" type="checkbox"/>
2 Create "training kit" on CDM and distribute study	Form working group at CCWG <input checked="" type="checkbox"/>		Launch kit <input checked="" type="checkbox"/>	Distribute study at COP16 <input checked="" type="checkbox"/>
3 Form partnership with a credible and influential environmental organisation	Prepare joint report with REEP <b>ONGOING</b>		Participate in WEC event <input checked="" type="checkbox"/>	
4 Hold two regional summits funded by local industry	1st Summit in Kuala Lumpur <input checked="" type="checkbox"/>	2nd Summit in Marrakech <input checked="" type="checkbox"/>	3rd Summit in Singapore <b>EXCEEDED</b>	
5 Actively represent the industry at 5 high-level intergovernmental forums		1st and 2nd meetings <input checked="" type="checkbox"/>	3rd meeting <input checked="" type="checkbox"/>	4th and 5th meeting <input checked="" type="checkbox"/>
6 Improve the global positioning of Exceptional Energy	Launch project <input checked="" type="checkbox"/>		Participate in WEC meeting in Montreal <input checked="" type="checkbox"/>	Highlight work in 23rd World LP Gas Forum <input checked="" type="checkbox"/>

### Goal B: Create the environment to develop and sustain LP Gas markets

Description	Targets			
	April 1st	July 1st	October 1st	January 1st
7 Increase the use of LP Gas in 2 developing countries through partnering with international organisations	Follow up with East Timor <input checked="" type="checkbox"/>	Complete first step of activities in Kuala Lumpur <input checked="" type="checkbox"/>	Identify new countries <input checked="" type="checkbox"/>	Complete first step of activity in new countries <input checked="" type="checkbox"/>
8 Carry out GAIN yearly activities		Prepare Autogas case studies <input checked="" type="checkbox"/>		Finalise comprehensive lobbying plan <input checked="" type="checkbox"/>
9 Improve and develop relations with regional and national associations	Hold first meeting with WGCC* <input checked="" type="checkbox"/>	Participate in NPGA SE Propane expo <input checked="" type="checkbox"/>	Meeting of WLPGA / AIGLP WG in Madrid <input checked="" type="checkbox"/>	Associations Executive meeting <input checked="" type="checkbox"/>

\* Global Coordination Working Group

### Goal C: Identify and stimulate innovation

Description	Targets			
	April 1st	July 1st	October 1st	January 1st
10 Global technology roadmap – implementation	Agree action plan ✓	Identify opportunities ✓	Conduct trials/pilots <b>NOT DONE</b>	Publish initial results ✓
11 Identification and testing of low sulphur odorants	Standards analysis concluded <b>ONGOING</b>	Terms of Reference and tests definitions ✓	Working group conclusions ✓	Distribute study at COP16 ✓
12 Innovation award	Begin to identify candidates ✓	Create award shortlist and evaluate ✓	Give out award at 23rd World LP Gas Forum ✓	

### Goal D: Promote compliance with health, safety and environment standards and good business practices

Description	Targets			
	April 1st	July 1st	October 1st	January 1st
13 Support two countries to improve their industry practices in collaboration with WLPGA members	Identify countries ✓	Intervention in Bangladesh ✓	Intervention in Country 2 <b>PLANNED</b>	
14 IOPCF and HNS representation	Monitor treaty and gather statistics <b>ONGOING</b>		Present status in Industry Council meeting in Madrid ✓	Participate in annual meeting ✓
15 BLEVE Working Group	First meeting at TNO – Netherlands ✓	Second meeting in Germany ✓	Presentation on the ADR September joint meeting – Geneva ✓	Project risk analysis ✓
16 Harmonisation of global standards	Agenda of key meetings ✓	USA Meeting <b>NOT DONE</b>	Project Follow up ✓	Identification of detailed targets <b>NOT DONE</b>

### Goal E: Facilitate and drive communication among all stakeholders

Description	Targets			
	April 1st	July 1st	October 1st	January 1st
17 Internal Communications	Review of WLPGA value generation ✓	Prepare WLPGA messaging ✓	Report findings back to Annual General Assembly ✓	
18 Preparation of Statistical Review	Kick off meeting with Data Monitor ✓	Finalization of document ✓	Launch document ✓	
19 Improve relations with Media	Renew GORKANA media database <b>NOT DONE</b>	Prepare WLPGA messaging ✓	Meet with three key journalists ✓	Meet with additional two key journalists ✓
20 Develop a rapid response procedure to manage communication following a major incident	Exchange current practices with Association members <b>ONGOING</b>	Develop and agree plan with Association members <b>NOT DONE</b>		
21 Organise a successful 23rd World LP Gas Forum incorporating AEGPL and AIGLP events			€490,000 available for allocation to overhead cost ✓	

# Achievements:

## Outreach, Lobbying & Communication

### Interview with James Rockall, WLPGA CEO and Managing Director



**James Rockall**  
WLPGA CEO and Managing Director

#### **Which 2010 achievements are you particularly proud of?**

The roll out of the Exceptional Energy brand is without doubt one of the most important achievements of the WLPGA's Outreach, Lobbying and Communication activities in 2010. Its purpose is to raise awareness of the benefits of LP Gas among policymakers, industry and consumers. Exceptional Energy allows the LP Gas industry to have a more powerful voice around the world today.

We also had a great year in terms of communication activities. For instance, over the last three years we produced three reference studies: on LP Gas and Climate Change, LP Gas and Health, and LP Gas and Energy Efficiency. We are also very proud of our studies on the Clean Development Mechanism and Black Carbon, both published in 2010.

#### **What was the main focus of your activities?**

In 2010, the WLPGA focused on communicating LP Gas as a low carbon fuel. For this purpose the WLPGA participated in the United Nations Framework Convention on Climate Change (UNFCCC) at the COP15 Climate Change Conference in Copenhagen last year. We also had very productive cooperation with other business associations and organisations.

In addition, we successfully created a partnership with a number of credible international organisations, such as the United Nations Environment Programme (UNEP), the World Bank, the International Chamber of Commerce (ICC) and the Asian Development Bank.

#### **One of the 2010 WLPGA goals was to make sure that the industry is represented at a global level. What were the main achievements in this area?**

The WLPGA participated in a number of forums in 2010 where it presented and promoted the benefits of LP Gas. This has helped increase awareness about LP Gas among policy makers and other stakeholders.



This year we were also present at the World Energy Congress, where WLPGA President Mr. Sarthak Behuria and I spoke at the opening day and our association had an Exceptional Energy stand. We also organised the World LP Gas Forum in Madrid, which was a great success.

The WLPGA was also represented at the Climate and Clean Energy Week event organised by the Asian Development Bank, at the Asia Clean Energy Forum and at regional Summits in Kuala Lumpur and in Chile. Furthermore, we participated in one of the most significant UN gatherings of global stakeholders on climate change in 2010, the UNFCCC COP16 Climate Change Conference in Cancun, Mexico.

**“The roll out of the Exceptional Energy brand is without doubt one of the most important achievements of the WLPGA’s Outreach, Lobbying and Communication activities in 2010. Its purpose is to raise awareness of the benefits of LP Gas among policymakers, industry and consumers.”**

**Do you think that WLPGA communication and lobbying activities helped the industry to communicate better? How?**

Absolutely. WLPGA communication and lobbying activities helped to raise awareness about LP Gas. In Madrid, at the World LP Gas Forum, for instance we had approximately 3,000 stakeholders attending our event. In addition, we wanted to ensure that the industry speaks with one voice and that this voice is heard all over the world. A series of tools was created for this purpose, with the Exceptional Energy brand as the most visible and tangible instrument – an umbrella which unites the entire LP Gas industry and helps to raise awareness about LP Gas among policymakers, media and opinion leaders.

# Exceptional Energy

In 2009, Exceptional Energy was developed as a brand for the LP Gas industry across Europe. In 2010, the WLPGA took this unique brand to another level by rolling it out globally. With a newly created broad benefits website, practical Industry Toolkit and refreshing advertising campaign, Exceptional Energy was globally launched at the 21st World Energy Congress (WEC) in Montreal, Canada, in mid-September 2010 and gained momentum by featuring at the 23rd World LP Gas Forum taking place in Madrid, Spain, from 28 September to 1 October 2010. On both occasions responses to the new 'one voice' approach and original 'Super Boy' angle were extremely positive and enthusiastic.

## 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. And we need it now. LP Gas is just that. It's an exceptional energy source due to its origin, benefits, applications and its industry.**

With an immediate and global availability, environmental benefits, its natural by-product origin, transportation flexibility and diverse application, LP Gas plays a pivotal role in the transition towards a more secure, sustainable and competitive energy model. Our industry is already aware of these unique and hugely beneficial characteristics of LP Gas. Now the rest of the world needs to be informed and convinced as well.

Against this background, the WLPGA began to unite the industry under the single Exceptional Energy branding over this past year to raise awareness of the exceptional features of LP Gas among policymakers, industry and consumers. An increased understanding of LP Gas as a clean, lower carbon, efficient and innovative energy source is of the essence to allow conscious and responsible decisions on the type of energy sources used. To achieve this, common goals and consistent positioning of LP Gas against other energy carriers is essential.

The positive and future oriented spirit of the brand, together with ready-made communication materials such as fact sheets, Q&A, resource centre, facts & figures, artwork and media room provide excellent messaging tools for WLPGA members. At the same time, members are encouraged to share interesting case studies for inclusion on the Exceptional Energy website. The website was launched in English and Spanish and more language versions are foreseen. Several Exceptional Energy branded Regional Summits were held in 2010 and these will continue in 2011. In addition, dedicated workshops are planned to inform national associations how to roll-out Exceptional Energy in their respective countries.

**Community Kitchens: A Stepping Stone to Modern Energy for Lower-income Rural Communities**

**Did you know?**

Reduced cooking time frees women to do more productive work, earn wages and educate their children.

**What are we doing?**

- Involving Member Communities United (MCU) to identify and establish a network of community kitchens in rural areas where modern energy is not available.
- The project is based on bringing the benefits of a modern energy source to the rural areas where modern energy is not available.
- The project is based on bringing the benefits of a modern energy source to the rural areas where modern energy is not available.
- The project is based on bringing the benefits of a modern energy source to the rural areas where modern energy is not available.

**What is the result?**

- The project is based on bringing the benefits of a modern energy source to the rural areas where modern energy is not available.
- The project is based on bringing the benefits of a modern energy source to the rural areas where modern energy is not available.
- The project is based on bringing the benefits of a modern energy source to the rural areas where modern energy is not available.

www.exceptionalenergy.com

**Exceptional Energy - Fact Sheet**

**LP Gas is an exceptional energy source due to its origin, benefits, applications and its industry**

With an immediate and global availability, environmental benefits, its natural by-product origin, transportation flexibility and diverse application, LP Gas plays a pivotal role in the transition towards a more secure, sustainable and competitive energy model.

Liquefied Petroleum Gas (LPG) is a clean-burning and efficient fuel and a vital source of energy for households. It is a product of the refining process of crude oil and is used in a wide range of applications. It is a clean, safe and renewable energy source that is readily available and can be used in a wide range of applications. It is a clean, safe and renewable energy source that is readily available and can be used in a wide range of applications.



“Exceptional Energy is supplier neutral, which means the entire industry can use it. We are encouraging all of our regional and national associations to use it so we are speaking with one voice and help spread the word that LP Gas is an Exceptional Energy.”

**James Rockall**  
WLPGA CEO and Managing Director

**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.

**WORLD LP GAS ASSOCIATION**  
www.worldlpgas.com

For more information, please visit:  
[www.exceptionalenergy.com](http://www.exceptionalenergy.com)

**EXCEPTIONAL CIRCUMSTANCES REQUIRE EXCEPTIONAL ENERGY**

Good air quality is a vital part of a healthy life. Autogas is a clean and readily available fuel that can improve air quality and mitigate climate change immediately.

Autogas is therefore the ideal choice for road transport.

**WORLD LP GAS ASSOCIATION**  
www.worldlpgas.com

For more information, please visit:  
[www.exceptionalenergy.com](http://www.exceptionalenergy.com)

**EXCEPTIONAL CIRCUMSTANCES REQUIRE EXCEPTIONAL ENERGY**

Different living and working conditions require tailor-made energy solutions.

LPG is extremely versatile and portable. It provides energy to some of the remotest parts of the world. It gives rural communities access to modern communications, contributing to a better quality of life.

**WORLD LP GAS ASSOCIATION**  
www.worldlpgas.com

For more information, please visit:  
[www.exceptionalenergy.com](http://www.exceptionalenergy.com)



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## WLPGA in the Media



### The Prince of Asturias opens the World LP Gas Forum Repsol, Spain

His Royal Highness the Prince of Asturias together with Repsol Chairman Antonio Brufau today opened the World LP Gas Forum. Antonio Brufau highlighted the importance of LP Gas in the fight against climate change and for improving air quality, affirming that it is a sustainable fuel destined to be a leader in the field of alternative energies.

30/09/2010



### North Africa sees solid growth Argus LPG World, UK

"This is the first time we have held one of these regional summits in North Africa, and we felt that it was very successful in bringing the industry together to take a clear look at the opportunities and challenges that exist in these markets," the WLPGA's director of market development Michael Kelly says.

02/06/2010



### 23e Forum de l'Association Mondiale du GPL à Madrid AutoAlgerie, Algeria

Pour le vice-Président de la World LP Gas Association, Mr Sarthak Behuria, "les énergie propres à l'image du GPL sont au centre des intérêts des législateurs, de la société civile et des médias. La demande mondiale augmente de plus en plus et plus de 2,5 milliards de personnes n'ont pas accès à ce type d'énergie tandis que 2 millions meurent chaque année pour cause de la pollution ambiante engendrée par l'utilisation de combustible nocif pour l'environnement."

20/09/2010



### Tasweeq marks its presence at WLPG Forum in Madrid AME Info, United Arab Emirates

James Rockall, Managing Director, WLPGA said, "We are very excited to organise WLPGA Forum in Qatar in 2011. Qatar is a major player in the LP Gas industry and we are glad to have Tasweeq as our official host."

29/09/2010

**FINANCIAL****ICC team delivers at UN climate talks****Financial Channel**

On 29 November, ICC member Kimball Chen, First Vice President of the World LP Gas Association, delivered a statement during the plenary session of the Ad-hoc Working Group on Long-term Cooperative Action. [...] "We urge governments to develop post-2012 actions that will provide business with the conditions it needs to meet urgent climate and energy challenges while maintaining robust economic growth." "He stressed the need to stimulate private sector investment in efficient and low-emitting technologies, set the conditions to speed up the deployment of existing and advanced technologies and provide a level playing field to spur competitive innovation," ICC said.

03/12/2010

**El sector mundial del gas licuado del petróleo se reúne mañana en Madrid****Terra, Chile**

En aquel momento, el director general de la WLPGA, James Rockall, señaló que se trata de una fuente de energía que cuenta con 3.000 millones de consumidores en el mundo y que si se pusieran en fila todas las bombonas de butano y propano que se utilizan en la actualidad darían la vuelta al mundo ocho veces.

27/09/2010

**Télex: Morocco Awards à Casablanca****Aujourd'hui, Le Maroc**

L'Association mondiale du gaz de pétrole liquéfié (WLPGA) a choisi le Maroc pour organiser, jeudi 20 mai à Marrakech, son 1er sommet régional en Afrique du Nord. Cette rencontre, marquée par l'intervention de Zniber Yahya, secrétaire général du ministère de l'Énergie, des Mines, de l'eau et de l'environnement, s'est tenue sous le thème: "LP Gas: une énergie exceptionnelle pour l'Afrique du Nord."

27/05/2010

**23rd World LP Gas Forum  
Cavagna Group, Italy**

This year's LP Gas forum held in Madrid was an extraordinary event; registering record participation of Companies from all over the world. The joint participation of WLPGA, AEGPL and AIGPL members, contributed its successful outcome.

08/10/2010

**Government sees 200 cities ready for piped gas in 5 years  
Daily News & Analysis, India**

Auto LP Gas is growing in India at a rate of 33%, but Korea and Japan are top consumers of auto LP Gas. James Rockall, Managing Director, World LP Gas Association said, "In India, LP Gas sales are more domestic-driven while in the US it is industries that consume LP Gas most. Also, we produce more LP Gas than we consume."

25/10/2010



Most of the

60,000

taxis in Tokyo are LP Gas powered to help control air pollution in the city.

# Market Development & Support



## **WPLGA provides guidance on how to give access to clean and modern energy to 100 million people in Asia and the Pacific Region.**

In June 2010, the WPLGA was unanimously voted on as a Member of the Steering Committee of the Energy for All Partnership (E4ALL). The Partnership, established by the Asian Development Bank (ADB) aims to provide access to clean and modern energy to 100 million people in Asia and the Pacific Region by 2015, and to reduce energy poverty in this region. The WPLGA has been involved in E4ALL since the Partnership's launch in 2008 and leads a working group on LP Gas. The Steering Committee comprises key partners from the donor community, financial institutions, foundations, government, the private sector and other expert contributions. Within the Steering Committee the WPLGA will provide guidance and high-level inputs on the strategy, operations, and the sustainability of the Partnership.

Within the E4ALL Working Group on LP Gas, the WPLGA organised the Asian LP Gas Regional Summit in Kuala Lumpur in February 2010. The Summit which brought together over 150 stakeholders from the LP Gas industry featured discussions with the LP Gas marketers about target countries which are struggling to gain access to affordable modern energy. Participants debated how remote populations can gain access to LP Gas in a safe, efficient and affordable way and which development models would work for Asia.

**“LP Gas is an ideal fuel for a rapidly changing and urbanising Asia as it is clean, low carbon, acceptable and accessible and requires minimal investments in infrastructure or R&D.”**

**Michael Kelly**  
WPLGA Director Market Development  
and Deputy Managing Director



“Air pollution, climate change and fuel security are key issues in Asia, and we value our collaboration with the WLPGA, as LP Gas is part of the solution.”

**Sophie Punte**

Executive Director,  
Clean Air Initiative for Asian Cities (CAI-Asia)

### WLPGA promotes LP Gas across the globe

In 2010, the WLPGA directly organised three very successful Regional Summits. The first Summit, as noted above, organised along with the Asian Development Bank attracted over 150 people from more than 30 countries and took place in Kuala Lumpur in February 2010 and addressed the issue of energy poverty in the Asia-Pacific Region. The second Regional Summit was held in Marrakech in May and examined the North African markets, particularly on the issues of supply and subsidy regimes. A third summit was held in Singapore in June, and focused exclusively on growing Autogas markets in the Asia Pacific region. Finally another Regional Summit, supported by the WLPGA took place in July 2010 in Santiago de Chile, and focused on how LP Gas could help Chile continue its transformation from a developing nation to a developed nation. The Chile event was attended by more than 250 stakeholders.

Regional Summits are an excellent way for the WLPGA to hold activities in regions where it has few activities in the course of a year. This allows Association members to learn about new markets and introduces WLPGA services to new potential markets. The WLPGA will continue to hold regional summits around the world in the coming years.

Working in innovative partnerships with multi-lateral organisations, development agencies and NGOs, and engaging in advocacy towards policy makers and opinion shapers, the Market Development programme is the vanguard of identifying new areas in which WLPGA member companies can operate.

## Climate Change Working Group

### WLPGA marks its presence at the UNFCCC COP16 Climate Change Conference in Cancun, Mexico

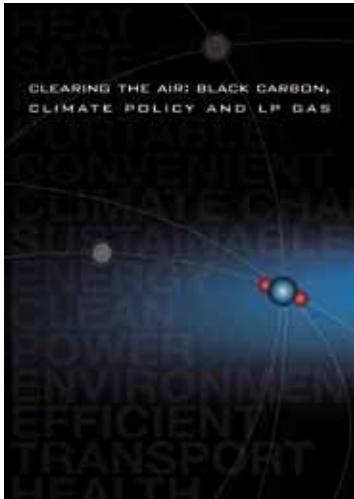
In December 2010, Kimball Chen, First Vice-President of the World LP Gas Association and Michael Kelly, WLPGA Director Market Development and Deputy Managing Director, represented the LP Gas industry at the United Nations Framework Convention on Climate Change (UNFCCC), COP16 Climate Change Conference in Cancun, Mexico.

Mr. Chen and Mr. Kelly advocated the social, economic and environmental benefits of LP Gas usage around the globe. LP Gas technologies, available and accessible worldwide, are helping to mitigate climate change by reducing greenhouse gas emissions immediately with no need for large investments in research and development or infrastructure.

Mr. Chen also spoke at the WLPGA-sponsored World Climate Summit. The summit was a valuable opportunity for the WLPGA to kickstart collaboration with businesses, investors and governments on implementing, scaling, financing, and replicating bottom-up solutions.

Mr. Chen and Mr. Kelly also took part in the Cancun Business Day, where the WLPGA was a partner. The event – hosted by the International Chamber of





Commerce (ICC) and the World Business Council on Sustainable Development (WBCSD) – gathered leading representatives of governments and business, aiming to increase dialogue and action between both parties and within the global business community. The WLPGA information stand at the Cancun Business Day presented LP Gas benefits to a wide number of government officials, negotiators and business representatives.

The WLPGA participated in the UNFCCC Climate Change Conference for the fourth consecutive time.

### WLPGA studies educate and inform energy stakeholders of the LP Gas benefits

Within the framework of the Climate Change Working Group, the WLPGA published two studies in 2010: *Clearing the Air: Black Carbon, climate policy and LP Gas* and *Clean Development Mechanism (CDM): opportunity for the LP Gas industry*.

The aim of the *Clearing the Air: Black Carbon, climate policy and LP Gas* publication was to inform energy stakeholders about Black Carbon emissions and their negative impact on the global climate as well as to provide information on the inherently clean burning, low Black Carbon profile of LP Gas.

*Clean Development Mechanism (CDM): opportunity for the LP Gas industry* is a great educational tool for the LP Gas industry on the opportunities to potentially benefit from carbon funding through the Clean Development Mechanism (CDM).

“The WLPGA has become a truly vital hub of ideas and strategies for the entire LP Gas industry. Over the past few years, the WLPGA’s skilled leadership has carefully refined the basic message that LP Gas associations and their members across the world should be spreading: this is that LP Gas is an exceptional fuel which has a big part to play in meeting the energy needs of the twenty-first century. We congratulate the WLPGA for their valuable work.”

**Nick Black**  
Senior Editor, Argus Media

The WLPGA Climate Change Working Group (CCWG), launched in February 2007, seeks to demonstrate that the energy technologies needed to continue current rates of development while mitigating climate change already exist and that LP Gas can be a major part of today’s solutions to this challenge.

# Good Industry Practices

## Global Autogas Industry Network (GAIN)

**GAIN is a network of leaders in the global Autogas industry. It provides a platform for the Autogas community to share its local experiences, technology development and innovative solutions. GAIN also acts as a communications and information centre for its members and the wider automotive industry community (equipment and car manufacturers, installers, etc.).**

**Last September, Joël Pedessac was appointed chairman of GAIN. Joël has worked for over 20 years in the LP Gas industry and has also been Director General of the French LP Gas Association for several years. An interview with the new GAIN Chairman.**



**Joël Pedessac**  
GAIN Chairman, WLPGA  
and Director General, CFBP

### How do you envisage the role of GAIN?

Our role is to inform, reach-out, educate and influence. GAIN objectives have always been to communicate more about the many Autogas success stories that exist worldwide and to get the message across that this is a fuel that holds huge potential on every continent from USA to India, Europe to China and further afield. Our job as GAIN is to ensure that Autogas is on the agenda of the stakeholders that impact our industry, communicate the benefits of Autogas and provide expertise where possible to create the foundations of a successful market. In 2010, our members were very active in doing this. In particular there is the advocacy outreach undertaken by UKLPG towards the new UK Parliament elected in May. The LP Gas Vehicles' Day in Japan in October was another example of the industry's efforts to have Autogas recognised for its benefits. The close cooperation we have in France with Renault to share a better understanding of the key success factors of the market is another example of how we reach our global objectives.

**“Autogas can be part of the solution to air quality and pollution control in many overcrowded cities; its environmental record is excellent; its usefulness is unquestionable and its safety when used correctly is second to none. It is the third fuel, the choice of over fifteen million motorists around the world.”**

### Can you tell us more about these benefits?

Autogas can be part of the solution in terms of better air quality and pollution control in many overcrowded cities; its environmental record is excellent; its usefulness is unquestionable and its safety when used correctly is second to none. It is the third fuel, the choice of over fifteen million motorists around the world. Unlike biofuels and electric cars, Autogas is available now – the infrastructure is in place to deliver substantial results for the environment and improving the quality of the air we breathe. Autogas yields 50% less carbon monoxide (CM), 40% less hydrocarbons (HC), 35% less nitrogen oxides (NOx) and has 50% less ozone forming potential compared to gasoline. Autogas is also free of particulates (PM) the main pollutant of diesel engines together with NOx.

“The situation in Turkey is definitely worth mentioning here. Turkey has the highest percentage of LP Gas-fuelled vehicles in the world. Some 37% of passenger cars run on LP Gas and LP Gas consumption now exceeds gasoline consumption.”



And last but not least, Autogas contributes to reduce GHG (CO<sub>2</sub> and methane) by 5% to 20% on a ‘well to wheel’ basis compared to conventional fuels. Governments in many countries recognise the contribution that these benefits offer towards meeting environmental goals, reducing health costs and including a third fuel to the transportation energy mix by supporting Autogas with vehicle conversion grants and reduced excise duties, often making it the most economic option for motorists.

#### Can you highlight some of the best Autogas success stories?

The situation in Turkey is definitely worth mentioning here. Turkey has the highest percentage of LP Gas-fuelled vehicles in the world. Some 37% of passenger cars run on LP Gas and LP Gas consumption now exceeds gasoline consumption. All conditions have gradually been put into place to form a sustainable Autogas market. The Turkish government regulated the LP Gas price to provide consumers with a net economic advantage of 20-35%. There are now 8,500 filling stations around the country and market growth has been supported by a network of 1,000 licensed conversion shops.

Many other success stories like Turkey can be accessed on the WLPGA website ([www.worldlpgas.com](http://www.worldlpgas.com)) by searching for Autogas Updates.





62%

of LP Gas in China is consumed in the smaller and medium sized cities in Eastern and Southern China.

# Identification & Stimulation of Innovation

## Global Technology Network (GLOTEC): Exploring technologies for new and existing markets

**Again in 2010 GLOTEC has proved to be a valuable platform for WLPGA members to exchange information and practices on technology and innovation within the LP Gas industry, with the ultimate objective of supporting industry growth. GLOTEC involves not only key industry experts but also innovation centres and equipment manufacturers and suppliers.**

Its four working groups have been active in the identification of new opportunities for both existing and new markets.

The working group on product quality issued its conclusions in October about an LP Gas odorant with low sulphur content. Complementary tests will be performed during 2011, in order to conclude the study and to consolidate all the work in a final report. In the field of new appliances, GLOTEC has two working groups looking at Micro-CHP (Micro Combined Heat and Power) and combined LP Gas/solar systems. Finally one of GLOTEC's working groups specifically focuses on harmonisation of standards on a global scale, through increased cooperation between European and US standardisation processes.



"The WLPGA's Global Technology Network (GLOTEC) provides a unique and important venue for international sharing of the latest developments in LP Gas technology. Through GLOTEC, the WLPGA offers a valuable service to its members by ensuring that successful breakthroughs in one region can be replicated globally to benefit the entire LP Gas industry."

**Ross Brindle**

Vice President, Nexight Group LLC

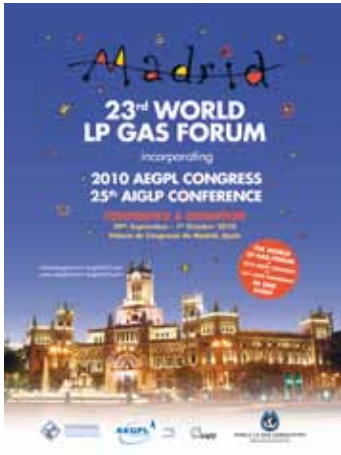
Beyond the work of its working groups, GLOTEC is generally committed to keeping the industry informed about technological developments and good practices around the world. This is the purpose of the GLOTEC meetings taking place 3 or 4 times a year. Best practices can relate to issues such as safety, standards enforcement or metal management. The sharing of technical expertise on equipment standards, cylinders, tanks, is also crucial to GLOTEC, which is now considering the development of an online platform for members. In collaboration with the AEGPL (European LP Gas Association) a Technical Library is under preparation and will be shared between AEGPL and the WLPGA.



Egypt's domestic LP Gas  
consumption has almost  
doubled over the past

**10** years.

## Global Technology Conference (GTC)



The 3rd Global Technology Conference (GTC-3), took place as part of the World LP Gas Forum in Madrid (1st October) and attracted more than 200 delegates.

Four sessions were organised to present papers on innovations that are crucial to the LP Gas industry:

- Operations & Power Generation
- Distribution & Logistics
- Applications
- Product & Environmental Issues

All the presentations will be assessed by the GTC steering committee and the winner of the 2011 WLPGA Innovation Award will be presented with the award in Doha at the 24th Forum in 2011.

During the conference, the 2nd WLPGA Innovation Award was given to Shungo Totsuka, ENEOS, for his paper on 'The World's first commercialisation of LP Gas fueled PEM fuel cell system for residential use', which he had presented at the second Global Technology Conference in Seoul back in 2008.



The GTC will now become an annual event from 2011.



Approximately

# 87%

of Bolivia's population  
uses LP Gas as fuel  
of which 97% is bottled.





# 2010 Events Overview

<b>February 23</b>	Kuala Lumpur: WLPGA Asian LP Gas Summit “LP Gas: Exceptional Energy for Southeast Asia”
<b>February 26</b>	Tokyo International LP Gas Seminar
<b>March 10 - 11</b>	Warsaw, Poland: 14th International LP Gas/CNG Forum
<b>March 22 - 26</b>	Bern: RID / ADR / AND Spring Joint Meeting
<b>April 10 - 12</b>	Atlanta: NPGA SE Convention & International Propane Expo
<b>April</b>	Russia: Argus Conference
<b>May 20</b>	Marrakesh: WLPGA North African Regional Summit “LP Gas: Exceptional Energy for North Africa”
<b>June 7</b>	Santiago: WLPGA Chilean Summit “LP Gas: Exceptional Energy for Chile”
<b>June 21 - 24</b>	Singapore: Purvin & Gertz 2010 Asia LP Gas Seminar
<b>June 23 - 25</b>	Manila: Asia Clean Energy Forum 2010
<b>September 13 - 17</b>	Geneva: RID / ADR /AND Autumn Joint Meeting
<b>September 12 - 16</b>	Montreal: WEC World Energy Congress
<b>September</b>	Timor Leste: LP Gas Working Group
<b>September</b>	Kunming China: 6th Asia Pacific LP Gas Conference
<b>September</b>	Madrid: WLPGA Forum
<b>October</b>	Madrid: Global technology Conference
<b>October 22</b>	Vienna: ISO TC 58 Plenary Meeting
<b>November 3 - 4</b>	Washington DC, USA: NPGA/PERC Leadership Summit
<b>November 3 - 5</b>	Singapore: 2nd Annual Clean Energy Expo Asia
<b>November 8</b>	Singapore: WLPGA Regional Summit “Autogas: Exceptional Energy for Transport in Asia”
<b>November 9</b>	Better Air Quality Asia BAQ (2010)
<b>November 9</b>	Lisbon: 5th Energy Expo
<b>November 29 - December 10</b>	Cancun: UNFCCC COP16 negotiations
<b>November 15 - 17</b>	Davis, California, USA: Governors Summit
<b>November 15 - 16</b>	Mumbai, India: All India LP Gas Distributors Summit
<b>November</b>	Dhaka, Bangladesh: Best Practice Workshop

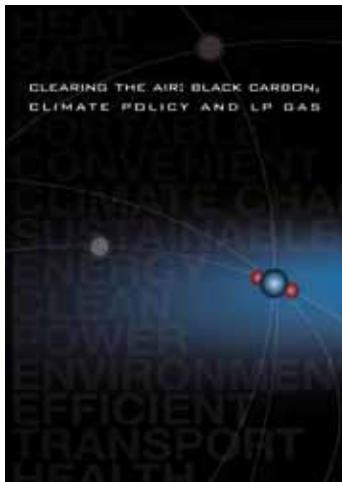
Spain uses more than

# 1.3

million tonnes of LP Gas  
as a energy source  
for heating and cooking.

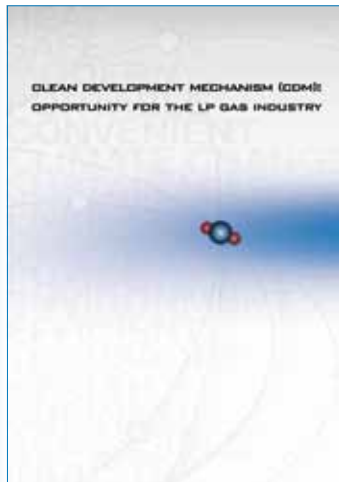


# Publications



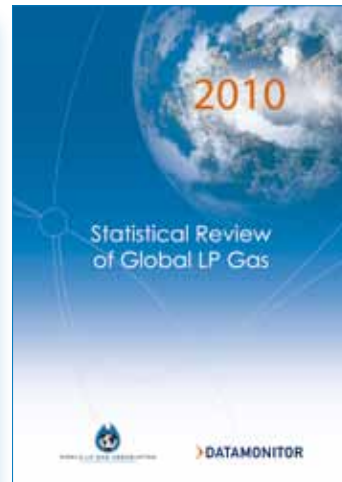
## Clearing the air: Black Carbon, climate policy and LP GAS

This 2010 WLPGA study informs energy stakeholders worldwide about the Black Carbon emissions and their impact on global climate as well as providing information on the inherently clean burning, low Black Carbon profile of LP Gas.



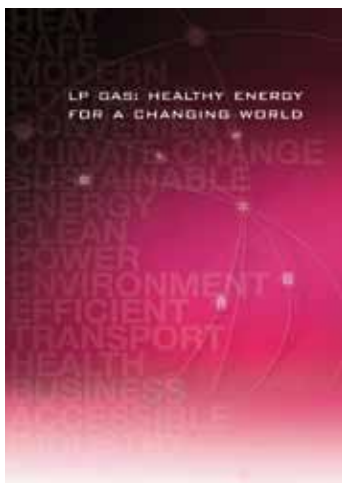
## Clean Development Mechanism (CDM): opportunity for the LP GAS industry

This study seeks to educate the LP Gas industry on the opportunities to receive carbon funding through the Clean Development Mechanism (CDM) by helping move segments of the populations in the developing world from dirty, greenhouse gas intensive fuels to cleaner, low carbon LP Gas.



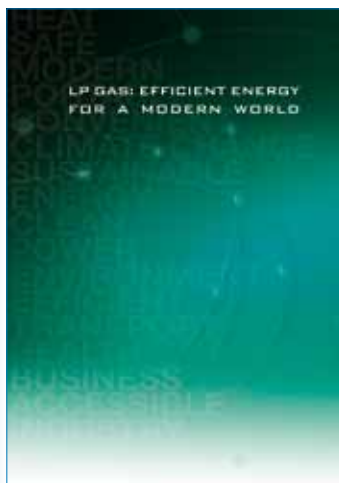
## Statistical Review of Global LP Gas 2010

The 2010 edition of the Statistical Review of Global LP Gas reveals how different markets around the world fared during this period of great economic uncertainty.



## LP Gas: Healthy Energy for a Changing World

This WLPGA study explores and compares the health impacts on society caused by pollutants emitted by a range of commonly used fuels both in indoor domestic applications and in outdoor applications.



## LP Gas: Efficient Energy for a Modern World

This study demonstrates that LP Gas is among the most attractive options for improving energy efficiency in various applications all over the world.

**We will be producing publications throughout 2011 and will update you when these are released.**

# World LP Gas Forum 2010



On 28th September-1st October 2010, the World LP Gas Forum brought together 3,000 participants from all over the globe, primarily LP Gas industry members but also a wide range of decision makers. This year's Forum consisted of a combination of four events in one: the annual World LP Gas Forum; 2010 AEGPL Congress (European LP Gas Association); the 25th anniversary of the AIGLP Conference (Ibero American LP Gas Association), and the third Global Technology Conference (GTC). The Forum exhibition was also a great success, with greater space for stands and more participants than ever before.

One of the highlights of the Forum was the official opening by His Royal Highness the Prince of Asturias:

**“In recent years the rise of renewable energy – so necessary for the future – is taking place in parallel with important technological advances also in conventional energy sources. Among these sources, liquefied petroleum gas will certainly continue to play a key role for years to come.”**

Ms. Teresa Ribera, Spanish Secretary of State for Climate Change and Mr. Miguel Sebastián, Minister of Industry, Tourism and Trade equally delivered informative speeches.

The Forum also constituted the internal launch of the 'LP Gas Exceptional Energy' brand, after an official launch at the 21st World Energy Congress in Montreal mid-September. The new brand was created by the WLPGA to raise awareness about the exceptional features of LP Gas amongst policymakers, industry and consumers. It allows the industry to speak with a single voice about LP Gas' environmental benefits, versatile applications and immediate global availability.

**“This Forum provides us with the ideal venue for taking a multilateral approach to the industry's challenges, as well as for deep and cooperative reflection on which instruments are necessary – or more so – to provide the best responses to those challenges.”**

His Royal Highness the Prince of Asturias





There are over

# 500,000

LP Gas powered forklift trucks in the US alone.

# WLPGA 2011 Outlook

## WLPGA Strategic Plan 2011 - 2013

In 2010, the WLPGA started an in-depth strategic review to understand key stakeholder's views on developments in the business environment since the last review in 2007. The review also served to determine necessary changes in the association's activities to optimally respond to the new business environment. For this purpose opinions were gathered through a series of interviews. This proved to be a valuable exercise, creating the foundations for an action plan for the next three years.



"The International Chamber of Commerce (ICC) is committed to looking at a broad range of solutions to deal with today's energy and sustainability challenges. Partnering with an organisation such as the WLPGA offers an opportunity for ICC's members to work with a dynamic global industry association and learn about an industry that is part of the long term solution to these challenges."

**Carlos Busquets**  
Policy Manager  
International Chamber of Commerce (ICC)

The review showed that key stakeholders and members overall endorsed the WLPGA's mission statements, attaching particular significance to demonstrating the benefits of LP Gas and positioning it as a clean energy source for a low carbon world.

Against this background, the WLPGA strategy for 2011 - 2013 is focused on ensuring recognition of the contribution that LP Gas can have across all markets, whether developed or developing. Addressing and increasing the role of LP Gas in climate change mitigation and its contribution to cleaner air is an essential part of this approach.



## Tasweeq Message



**Saad A. Al-Kuwari**  
Acting Chief Executive Officer, Tasweeq

**With the world airing concerns about rising levels of carbon and global warming, many countries are shifting their focus from conventional forms of fuel to cleaner and healthier solutions.**

It is inevitable that we urge a wide use of LP Gas worldwide for a better environment. The LP Gas industry is set to scale newer heights with countries around the world realising the significance of adopting green energy.

The World LP Gas Association (WLPGA) has been a key driver in promoting partnership between producers and distributors. However, the attempt to popularise LP Gas as an “Exceptional Energy” through forums and conferences will gain momentum only when different sectors of the LP Gas industry come together to support the WLPGA through active participation.

The WLPGA reaches out to varied markets in both developed and developing countries, encouraging the shift from high carbon producing fuels to eco-friendly LP Gas. The Association has constantly aimed to bring to the fore the latest developments in the LP Gas Industry – be it production, distribution or technological advancements.

**“WLPGA reaches out to varied markets in both developed and developing countries, encouraging the shift from high carbon producing fuels to eco-friendly LP Gas.”**

This year, I have joined the Board of the Industry Council, representing the upstream market, and I sincerely hope, in my capacity, to add value to the Association.


The World LP Gas Forum (WLPGF) is coming to Qatar next year, a first for the Gulf Cooperation Council countries. This region has a strategic advantage due to geographical proximity to major consuming markets such as Asia and North Africa, and we are certainly optimistic of providing the right impetus to networking and business optimisation of participating countries.

Qatar International Petroleum Marketing Company Ltd. (Tasweeq) is the proud host of the Forum and welcomes all the WLPGA member countries to Qatar to enjoy our hospitality and conducting fruitful business.



# 2011 Events Overview

- February 8** Washington DC: WLPGA network meetings (GAIN; GLOTEC)
- February 9** Washington DC: WLPGA North America / Europe Summit (Exceptional Energy for North America and Europe)
- February 10** Washington DC: WLPGA Board and Industry Council meetings
- February 17 - 18** Canberra, Australia: LP Gas Australia National Conference (LP Gas... an Exceptional Energy for Australia's Future)
- February 24 - 25** Tokyo, Japan: International LP Gas Seminar
- March 17 - 18** New Delhi, India: LP Gas, Exceptional Energy for India
- March 17 - 20** Istanbul, Turkey: LP Gas, CMG, LNG Fair 2011
- April 6** Santiago de Chile: 1st GLOTEC Latin America meeting
- April 6 - 8** Santiago de Chile: 26th Annual Ibero-American LP Gas Congress
- April 16 - 18** Atlanta, USA: NPGA South Eastern Convention & International Propane Expo 2011
- May 18** Cardiff, UK: UKLP Gas Annual Conference
- May 30 - 31** Bremen, Germany: DVFG Annual Conference
- June 13 - 15** Washington DC: Propane Days 2011
- June 14** Annual General Meeting of the Nigeria LP Gas Association
- June 20 - 21** Bucharest, Romania: WLPGA GAIN, GLOTEC, CCWG, Industry Council & Board meetings
- June 22 - 24** Bucharest, Romania: European LP Gas Association (AEGPL) Congress
- September 14 - 15** Paris, France: Gas Conference
- September 26 - 28** Doha, Qatar: 24th World LP Gas Forum (Delivering a Future of Exceptional Energy)
- September 28** Doha, Qatar: 4th Global LP Gas Technology Conference
- September 29** Doha, Qatar: 1st Global Autogas Summit
- November 8** The Nigeria LP Gas Association General Conference
- November 13 - 14** Gauteng, South Africa: The LP Gas Safety Association of Southern Africa Annual Conference



Per year, Australians  
use an estimated

35

kg of LP Gas per capita  
in domestic applications which is more than  
triple the average use in Hungary but a third  
less than the quantity used in Venezuela.

# WLPGA Organisation

## Board of Directors

The WLPGA staff 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 the voice of the Industry.

The WLPGA Board is composed of a President, a First Vice-President, three Vice-Presidents and four other Board Members. The current Board was elected at the Annual General Assembly of 28th September 2010. The Board composition is representative of the business activities and geographic diversity of members.

This Board meets at least twice a year to agree the budget and approve the accounts for ratification by the General Assembly.

### President

**Ramón  
DE LUIS SERRANO**

CEO, Repsol Butano. Executive  
Director LPG Global, Repsol (Spain)

### First Vice President

**Kimball CHEN**

Chairman  
Energy Transportation Group, Inc  
(USA)

### Vice President

**Pedro JORGE FILHO**

Managing Director,  
Ultragaz (Brazil)

### Vice President & Treasurer

**Loïc DRIEBEEK**

Senior Vice President,  
SHV Gas (The Netherlands)

### Vice President

**Anders ANDERSON**

CEO,  
Kosan Crisplant (Denmark)

### Board Member

**Saad Abdullah  
AL-KUWARI**

Acting CEO,  
Tasweeq (Qatar)

### Board Member

**Yağiz EYÜBOĞLU**

General Manager,  
Aygaz A.S. (Turkey)

### Board Member

**Adebayo IBIROGBA**

Group General Manager,  
Group General Manager, Greenheld  
Refineries NNPC (Nigeria)

### Board Member

**Masakazu SATO**

President & CEO - Mitsui Marubeni  
Liquefied Gas co.Ltd, Japan  
President, Liquefied Petroleum Gas  
Center (LPG Center of Japan)

# Industry Council

The Industry Council was inaugurated in 1996 and is composed of leading companies in the LP Gas business. The Industry Council directs the Association's actions by identifying issues, developing strategies and formulating projects. Actions launched by the Industry Council aim at enhancing the positive image of LP Gas worldwide and promoting LP Gas use to satisfy the growing need for an all-purpose, efficient and environmentally friendly fuel. Whether focused on specific market segments or the LP Gas industry in general, the Industry Council's actions are designed to increase the worldwide use of LP Gas. In 2010, the following six organisations joined the Industry Council: Cavagna Group; Nigeria National Petroleum Corporation; Pertamina; Ragasco; Siraga and Qatar International Petroleum Marketing Co. Ltd. (Tasweeq).



# Team Overview

Based in Paris, France,  
the WLPGA team is led by  
James Rockall  
CEO and Managing Director.



**James Rockall**

CEO and Managing Director



**Michael Kelly**

Director Market  
Development and Deputy  
Managing Director



**Armando Viçoso**

Technical Director



**David Tyler**

Director, Projects  
& Business Practices



**Laurence Poret**

Office Manager



**Alison Abbott**

Communications  
& Marketing Manager



**Esther Assous**

Events Planner  
& Coordinator



**Rita Pecilunas**

Event Sales Manager

# 24<sup>th</sup> WORLD LP GAS FORUM

CONFERENCE  
EXHIBITION  
& GLOBAL TECHNOLOGY  
CONFERENCE  
DOHA, QATAR  
26-29 SEPTEMBER 2011  
SHERATON DOHA RESORT  
& CONVENTION HOTEL

## KEY DATES

Pre-registration for  
attendees & visitors  
opens:

Spring 2011

Exhibition booth  
sale starts:

Autumn 2010

GTC call for abstracts  
available:

Winter 2010

SAVE  
THE DATE!

[www.wlpgas2011.com](http://www.wlpgas2011.com)



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