



ANNUAL REVIEW 2017

EUROPEAN LPG ASSOCIATION



European
LPG
Association



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LPG SUSTAINABLE ENERGY FOR TODAY AND TOMORROW

FROM... OIL REFINING
& NATURAL GAS EXPLOITATION

USED IN



HOMES

COOKING STOVES,
BOILERS, BARBECUES,
WATER HEATERS...



AGRICULTURE

LIVESTOCK FARMING,
GREENHOUSES,
GRAIN DRYERS,
IRRIGATION SYSTEMS...



INDUSTRY

MICROTURBINES,
POWER GENERATORS,
BITUMEN MELTERS,
OVENS, CHPS...



TRANSPORT & MOBILITY

VEHICLES, MOPEDS,
SCOOTERS, FORKLIFTS...

LPG
LIQUIFIED
PETROLEUM
GAS

WHY IS LPG
A CLEAN ALTERNATIVE?

ALMOST
**NO BLACK
CARBON**
EMISSIONS

EMITS **49%**
LESS CO₂
THAN COAL

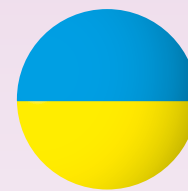
AND **17%**
LESS THAN
HEATING OIL

23% LIFECYCLE
GHG FOOTPRINT
LOWER THAN DIESEL
AS TRANSPORT
ALTERNATIVE FUEL!

LOW
EMISSIONS

LPG EUROPEAN INDUSTRY

THE TOTAL DEMAND OF
LPG IN EUROPE GREW BY **3%***



UKRAINE HAD
350,000t
MORE DEMAND



NORWAY
EXPERIENCED A
9%
INCREASE OF INDUSTRIAL
CONSUMPTION



GERMANY HAD THE
BIGGEST INDUSTRIAL
DEMAND INCREASE WITH
740,000t/y



RESIDENTIAL SEGMENT
IN SPAIN GREW BY
10%



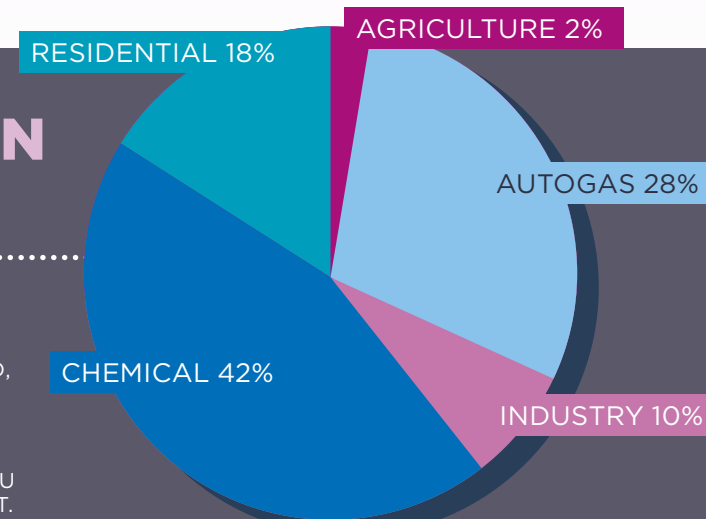
15 MILLION
VEHICLES CURRENTLY
USE LPG AUTOGAS

AUTOGAS
DEMAND
INCREASED BY
5.1%



OVER
46,000
STATIONS
SUPPLY LPG ALL
OVER EUROPE

LPG CONSUMPTION BY SECTOR



*EU COUNTRIES, BOSNIA AND HERZEGOVINA,
MONTENEGRO, NORWAY, SERBIA, SWITZERLAND,
TURKEY AND UKRAINE.

*DATA FROM THE EUROPEAN LPG SECTOR
OVERVIEW 2017 (EVOLUTION 2015-2016). AS A
MEMBER OF OUR ASSOCIATION WE PROVIDE YOU
WITH FREE COPIES OF THIS STATISTICAL REPORT.

FOREWORD BY THE PRESIDENT

IT IS WITH GREAT HONOUR AND PLEASURE THAT I ADDRESS YOU, DEAR READER, FOR THE FIRST TIME AS PRESIDENT OF THE EUROPEAN LPG ASSOCIATION.

I will use this publication, the Annual Review, to identify some of the highlights of AEGPL's work in 2017. Before I do that, though, allow me to leave here a public "Thank You" to Paul Ladner who lead the Association's work as its President for the past two years – Paul, you left me big shoes to fill and I will do my utmost best to deliver as you did!

2017 was a good year for the European LPG Association. Our landmark annual event, the AEGPL Congress took place in Lisbon, in June. Once more this event was a great success, bringing together around 1200 people representing all the LPG value chain, from Europe and beyond. For two days, the attendees to the Conference listened to experts discussing a wide array of topics, such as the trends behind supply and demand, or the role of LPG in the community and small businesses. At the same time, over one hundred companies exhibited the most innovative products in the exhibition area, showcasing how vibrant our industry is! To our hosts, the Portuguese LPG Association, and to our sponsors who made it all possible, a big thank you.

2017 was also the year when, for the first time, the AEGPL presented an Award recognising the work done by National Associations in advocating the benefits of LPG at national level. The AEGPL National LPG Association Advocacy Award – an initiative that will become annual – is decided by a panel of expert juries who assess the merits and impact of the various entries. In 2017 the Award was won by the CFBP - Comité Français du Butane et du Propane – for its campaign on raising awareness to the benefits of Autogas in France. I am very proud of the work done by national associations in Europe and look forward to discovering who the next winner of the AEGPL National LPG Association Advocacy Award will be, in Monaco in 2018.

As we prepare our work for 2018 we are empowered by the confirmation that AEGPL's members feel their interests reflected by the work of the Association. As the Association celebrates its 50th Anniversary, we believe that our mission and raison d'être remain valid, even half a century after the creation of the Association. We look forward to continuing working together with our members, not only in 2018, but for the next 50 years!



FRANCESCO FRANCHI
PRESIDENT OF AEGPL

AEGPL MISSION REPRESENTING THE EUROPEAN LPG SECTOR

AEGPL (Association Européenne des Gaz de Pétrole Liquéfiés) is the sole representative of the LPG industry at the European level. We represent national LPG associations, as well as distributors and equipment manufacturers from across Europe.

AEGPL's mission is to engage with EU decision-makers and the wider policy community in order to optimise the contribution that LPG, as a clean and immediately available energy source, can make to Europe's energy and environmental challenges.

GENERAL MANAGER'S REMARKS

AM I THE ONLY ONE THINKING I WAS IN A TIME MACHINE? SO MANY THINGS HAPPENED AT AEGPL IN 2017, AND SO MUCH ENERGY WAS BROUGHT INTO THE ASSOCIATION BY THE MEMBERS AND BY THE STAFF THAT IT FEELS LIKE THE LAST TIME WE ISSUED OUR ANNUAL REVIEW WAS JUST A FEW WEEKS AGO!

Where shall I start? First of all, AEGPL has seen many changes in its management, with both a new Management Committee and a new Steering Committee being elected this year. I would like to warmly thank all the members who have taken an active role in these important groups in the last few years. I am particularly pleased with the new Steering Committee I will be working with for the next 3 years, which is not only fully revitalized but also better gender-balanced than in the past.

AEGPL has been in 2017 busier than ever with a fast-changing policy environment, especially in the context of the legislative review of the EU Clean Energy Package. Our team has had countless exchanges with Members of the European Parliament, officials from the Council and from the Commission over the last 12 months, to make sure that our industry's proposals would be heard. We were therefore very pleased to see that a number of our key amendment

suggestions were integrated in the EP and the Council reports on the Energy Efficiency Directive, the Renewable Energy Directive, and the new Regulation on the Energy Union Governance. A key milestone has been to achieve a much stronger focus of the package on the issue of air pollution, which will help maintaining the recognition of LPG's benefits as a clean-burning energy.

Another important win was scored by our team of experts from the Technical Coordination Group. After years of hard work, the AEGPL proposal on alternative methods for the periodic inspection of cylinders was finally approved by the RID-ADR joint meeting in Geneva.

Finally, I cannot help mentioning the success of AEGPL in getting LPG fully recognised in the EU-funded European Alternative Fuels Observatory (<http://www.eafo.eu/>). This platform greatly helps raising awareness in Europe of Autogas and its related environmental benefits. We are also very happy to announce that AEGPL was recently appointed by the European Commission as an official member of the consortium managing this exciting project.

I hope you will enjoy reading this publication. The AEGPL team and I will be looking forward to working ever closer with you in 2018!



SAMUEL MAUBANC
GENERAL MANAGER OF AEGPL

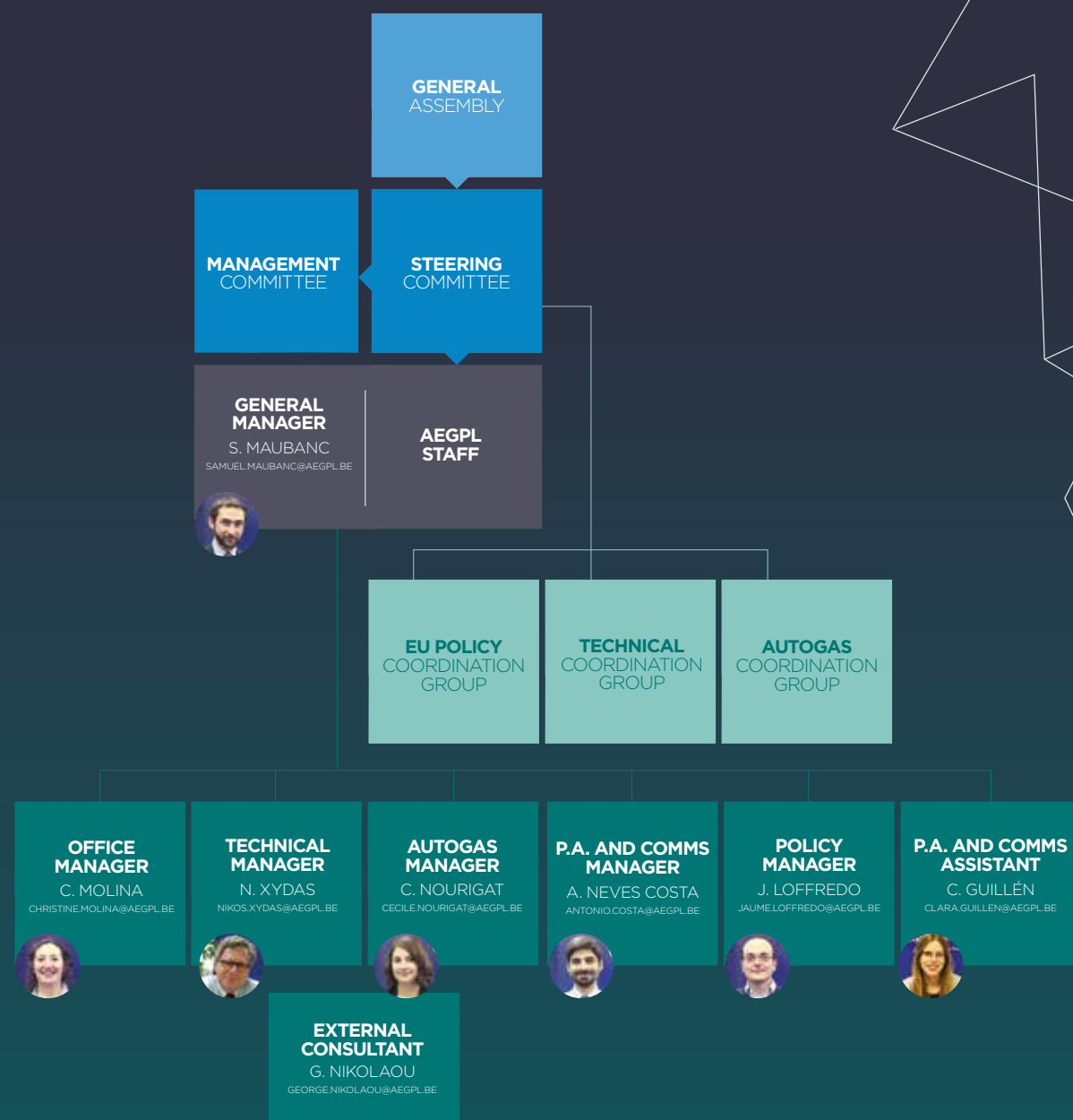
WHAT WE DO & HOW WE WORK

Representing national LPG associations and companies across Europe, AEGPL is the most comprehensive network of professionals from the European LPG sector, whose expertise and input provides the basis for both EU energy policy and technical and HSE work.

Through coordination between the team in Brussels and our members, AEGPL works to promote the industry's interests through the sharing of knowledge and best practices from all across the sector and the continent.

ORGANISATION

AEGPL STRUCTURE 2018



AEGPL'S COORDINATION GROUPS

EU POLICY

- + Energy Efficiency Working Group
- + Renewable LPG Advocacy Working Group
- + Energy Taxation Directive Working Group

AEGPL's Policy Coordination Group, made up of policy experts from amongst AEGPL's members, comprises working groups on specific legislative dossiers.

The working groups operate together by frequent conference calls and occasional in-person meetings to enhance the understanding of potential impacts of legislation, and ensure our message to the European institutions and national governments is as consistent as possible. The coordination group is managed from Brussels by the AEGPL secretariat.



TECHNICAL

- + Transport RID/ADR/ADN Working Group
- + Bleve Prevention Working Group
- + Internal inspection of cylinders during periodic requalification Working Group
- + AEGPL incidents/accidents Working Group

AEGPL's technical coordination group, managed by AEGPL's technical manager, consists of technical experts from its members. It is responsible for steering AEGPL's technical work. It formulates responses to emerging technical and HSE legislation and it devises

strategies for appropriate enforcement of relevant laws at national level and eradication of unsafe and unfair practices.

It meets four times a year, with additional ad hoc net meetings, conference calls and additional task force activities organised as needed. AEGPL's technical manager is shared with the World LPG Association, bringing in synergies between the European LPG sector and the rest of the world.



AUTOGAS

The Autogas coordination group covers policy and technical issues that are of specific relevance to the use of LPG as transport fuel.

To ensure synergies and optimal use of staff and members expertise, two-way communication channels are established with the other two Coordination Groups for issues that may be of shared interest.

This group allows the interested members to participate in discussions such as the long term development of the Autogas infrastructure and how to best implement future fuel requirements, modernising the brand Autogas.



AEGPL MANAGEMENT COMMITTEE



PAUL LADNER
PRESIDENT
GROUP CEO OF UGI EAST



FULCO VAN LEDE
TREASURER
CEO OF SHV ENERGY



FRANCESCO FRANCHI
VICE-PRESIDENT
PRESIDENT AND CEO OF
COSTIERO GAS LIVORNO



HENRY CUBBON
MANAGEMENT
COMMITTEE MEMBER
MANAGING DIRECTOR
OF DCC ENERGY LPG



JOËL PEDESSAC
PAST PRESIDENT
GENERAL MANAGER
OF CFBP



JAN - JULY 2017

"IT HAS BEEN MY GREAT PRIVILEGE TO SERVE AT AEGPL'S MANAGEMENT COMMITTEE, THE BODY TASKED WITH COORDINATING THE ASSOCIATION'S ACTIONS. I HAVE BEEN ABLE TO SEE FROM THE INSIDE HOW THE ASSOCIATION HAS DEVELOPED AND I LEAVE THE MANAGEMENT COMMITTEE IN THE CERTAINTY THAT AEGPL IS HEADING IN THE RIGHT DIRECTION."

JOËL PEDESSAC
CFBP



FRANCESCO FRANCHI
PRESIDENT
PRESIDENT AND CEO OF
COSTIERO GAS LIVORNO



DR. ANDREAS STÜCKE
TREASURER
GENERAL MANAGER
GERMAN LPG
ASSOCIATION (DVFG)



FULCO VAN LEDE
VICE-PRESIDENT
CEO OF SHV ENERGY



HENRY CUBBON
MANAGEMENT
COMMITTEE MEMBER
MANAGING DIRECTOR
OF DCC ENERGY LPG



PAUL LADNER
PAST PRESIDENT
GROUP CEO OF UGI EAST



AUG 2017 - TODAY

THE AEGPL ANNUAL CONGRESS



OUR WORK IN 2017

AEGPL KEY WINS

- 🏆 One third of speakers at AEGPL Congress 2017 were women
- 🏆 Dedicated space for LPG on the European Alternative Fuels Observatory
- 🏆 Hike in number of users of the AEGPL Lobbying Tracker
- 🏆 Reasonable requirements on the Renewable Energy Directive
- 🏆 Streamed regulation on cylinder inspection



ENERGY EFFICIENCY DIRECTIVE

IN SOME MEMBER STATES, THE NATIONAL IMPLEMENTATION OF THE ENERGY EFFICIENCY DIRECTIVE HAS RESULTED IN DISPROPORTIONATE COSTS FOR THE LPG INDUSTRY.

Despite the Directive allows Member States to exempt small energy sectors from white certificate schemes, some of them decided to impose such schemes also to LPG companies. In the new European Commission proposal released in November 2016, such possibility was kept, although several stakeholders were advocating for removing all existing flexibilities.

In addition, the new Commission proposal includes a new, lower, Primary Energy Factor (PEF) for electricity, which, if ratified by the European Parliament and by the European Council, would put LPG boilers and water heaters at a competitive disadvantage in comparison with electric appliances.

In several meetings with MEPs, AEGPL made the case for maintaining the exemption from white certificate schemes for smaller utilities and to include a Primary Energy Factor that better reflected the actual efficiency of the power generation sector.

On 17 January 2018, the European Parliament voted its position on the Energy Efficiency Directive, which, if confirmed in the final text would:

- + Keep the possibility for Member States to exempt some energy distributors from white certificate schemes
- + Allow LPG companies to financially contribute to a national fund stimulating interventions improving energy efficiency, instead of managing white certificate schemes
- + Allow Member States to foresee additional rewards in the white certificate schemes for measures that improve efficiency and also cut pollutant emissions, such as switching from traditional coal appliances to condensing LPG boilers
- + Introduce a PEF that reflects the efficiency of the power generation sector
- + Push Member States to promote LPG in the transport sector





RENEWABLE ENERGY DIRECTIVE

AS A RESULT OF AEGPL'S OUTREACH EFFORTS THE EUROPEAN COMMISSION INCLUDED SEVERAL REFERENCES TO BIO LPG IN THE PROPOSAL FOR A REVISION OF THE RENEWABLE ENERGY DIRECTIVE RELEASED IN NOVEMBER 2016.

This was a clear sign of the European Commission's support for this product as it has a clear potential to reduce CO₂ emissions in some sectors where there are not many available options.

The proposal also included an obligation on transport fuel distributors to supply a certain percentage of renewable energy. This was problematic for LPG companies, as Bio LPG is a novel product and production capabilities are not yet sufficient to meet the requirement proposed by the European Commission.

AEGPL and LPG national associations had extensive contacts with Member State representatives sitting in the Council of the European Union, explaining that the proposed measures disproportionately damaged promising newcomers in the renewable energy sector, such as the LPG industry.

In its general approach, the Council has understood the LPG industry's concerns and included a provision allowing Member States to set lower targets for those fuel distributors supplying fuels for which renewable technologies are not yet mature.

In addition, the Council clarified that Member States can also decide not to impose a specific obligation on fuel suppliers, but to rely on alternative measures in order to meet the target, such as subsidy schemes.

The Council and the European Parliament approved their respective positions and are currently negotiating in order to reach an agreement on a common text. The final approval of the Directive is expected for mid-2018.

"AEGPL HAS BEEN AN ACTIVE PLAYER THROUGHOUT THE CLEAN ENERGY PACKAGE NEGOTIATIONS WITH THE EUROPEAN UNION INSTITUTIONS IN BRUSSELS - A FUNDAMENTAL DOSSIER FOR OUR SECTOR. WE LOOK FORWARD TO SIMILAR INTENSE ADVOCACY EFFORTS IN OTHER UPCOMING EU INITIATIVES, SUCH AS THE CLEAN MOBILITY PACKAGE."

ESTHER BUSSCHER
SHV ENERGY



GOVERNANCE OF THE ENERGY UNION

TOGETHER WITH THE ENERGY EFFICIENCY DIRECTIVE, THE ENERGY PERFORMANCE OF BUILDINGS DIRECTIVE AND THE RENEWABLE ENERGY DIRECTIVE, THE EUROPEAN COMMISSION RELEASED A PROPOSAL CONTAINING RULES THAT MEMBER STATES WILL NEED TO FOLLOW WHEN THEY IMPLEMENT SUCH PROPOSALS.

A welcome development was the European Commission's attention to the effects that the implementation of these Directives would have on the environment, including air quality.

In several meetings with MEPs, AEGPL advocated for requiring Member States to perform a robust impact assessment of the planned measures implementing the Clean Energy Package, in order to make sure that air quality is not overlooked.

The European Parliament welcomed AEGPL's propositions in the Plenary vote that took place on 17 January 2018. More specifically, they called for assessing the impact on air quality of the individual and aggregated policy measures that Member States plan to adopt to implement the Energy Efficiency and Renewable Energy Directives.

AEGPL expects that this would ensure that low carbon and low polluting fuels, such as LPG, are favoured by Member States over fuels and technologies that have a worse performance in terms of pollutant emissions.



ENERGY PERFORMANCE OF BUILDINGS DIRECTIVE

IN THE UNITED KINGDOM, BUILDINGS' ENERGY PERFORMANCE CERTIFICATES PUT LPG AT A DISADVANTAGE OVER HEATING OIL BECAUSE THE CALCULATION OF THE ENERGY PERFORMANCE OF A BUILDING DOES NOT ONLY TAKE INTO ACCOUNT THE EFFICIENCY OF THE SYSTEM, BUT ALSO THE PRICE OF THE FUEL USED.

This results in evident shortcomings, as, in some cases, buildings relying on lower efficiency heating oil boilers are awarded a better energy efficiency ranking than buildings equipped with high efficiency condensing gas boilers.

The proposal revising the Energy Performance of Buildings Directive in November 2016 clearly states that the calculation of the energy performance of a building should only reflect the amount of energy normally used in buildings, hence fixing these shortcomings.

The proposal also foresaw a requirement for Member States to speed up the renovation rate of their building stock, however this measure did not consider the potential for also reducing the impact on air quality of the heating sector.

AEGPL met with key MEPs following this political dossier, showing that fuel switching to low carbon and low polluting fuel, such as LPG, can simultaneously cut the energy consumption of the building sector and reduce CO2 and air pollutant emissions.

On 11 October 2017, the European Parliament's industry Committee welcomed AEGPL's proposition, requiring Member States to estimate the benefits in terms of air quality and of healthcare costs of the renovation strategies.

"AS CHIEF EXECUTIVE OF AN ASSOCIATION REPRESENTING BOTH LPG AND LNG, IT HAS BEEN REFRESHING TO ME TO SEE THAT THE AEGPL IS AN OPEN MINDED ASSOCIATION THAT SEARCHES FOR SYNERGIES WITH OTHER LIKEMINDED ORGANISATIONS."

MARIA MALMKVIST
ENERGIGAS SVERIGE



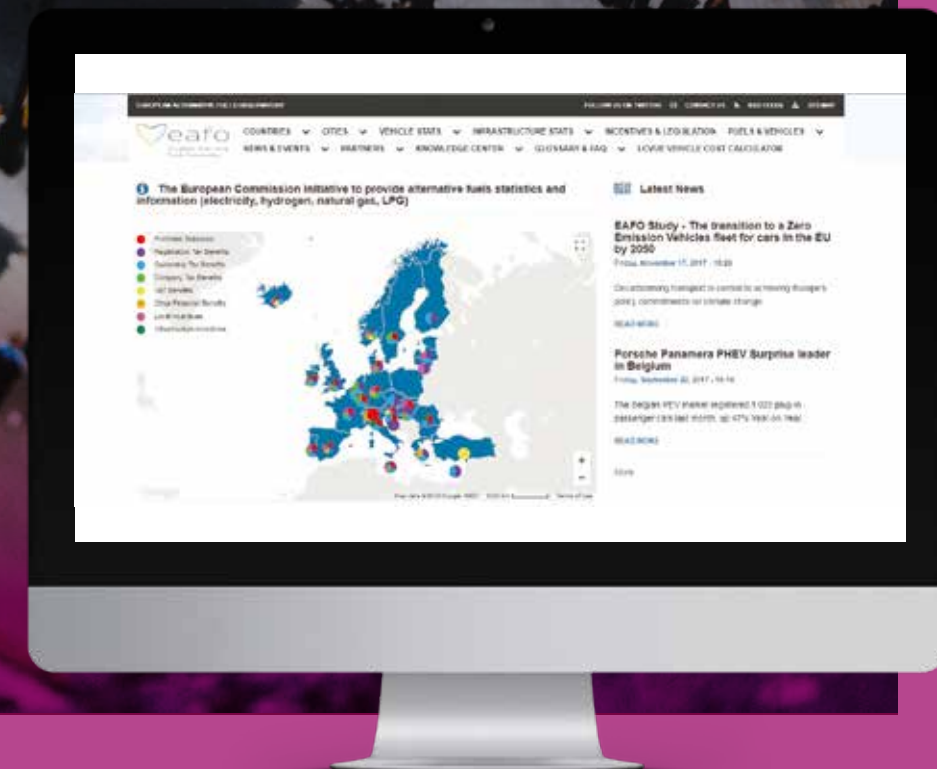
LPG DATA ON THE EUROPEAN ALTERNATIVE FUELS OBSERVATORY

THANKS TO AEGPL ADVOCACY, EUROPEAN ALTERNATIVE FUELS OBSERVATORY (WWW.EAFO.EU), A EUROPEAN COMMISSION SPONSORED WEBSITE CONTAINING INFORMATION ON ALTERNATIVE FUELS, HAS EXTENDED ITS SCOPE TO COVER LPG, IN ADDITION TO HYDROGEN, NATURAL GAS AND ELECTRIC VEHICLES.

The data currently on the webpage covers the Autogas fleet and number of refuelling stations (with trends since 2008), as well as information on the OEM models available in Europe. It mainly derives from AEGPL statistical report, but was reviewed by the EAFO team and cross-checked with other sources.

The inclusion of Autogas is a great achievement for future advocacy initiatives. Indeed, the EAFO is used by EU policymakers as a reference for data on alternative fuels, therefore it reinforces the position of LPG as being covered by the EU definition of clean alternative fuels.

AEGPL was then invited to become part of the consortium, which submitted a bid in response of a call for tender for managing the project during the next phase. The Commission awarded the contract to the consortium, made of AVERE (European Association for Electromobility), FIER (consultancy), HyER (Hydrogen Fuel Cells and Electromobility in European Regions), ICCT (International Council for Clean Transportation), POLIS (Cities and Regions for Better Transport), TNO (Netherlands Organisation for Applied Scientific Research) and of course AEGPL, which will help improving our relationship with DG MOVE as well as these influential stakeholders.





EUROPEAN STRATEGY FOR LOW-EMISSION MOBILITY

AEGPL HAS BEEN ACTIVELY ENGAGING WITH MEPS ON THE EUROPEAN PARLIAMENT RESOLUTION ON A EUROPEAN STRATEGY FOR LOW-EMISSION MOBILITY, WHICH WAS ADOPTED IN PLENARY IN DECEMBER. IT INCLUDES SOME ELEMENTS OF RELEVANCE TO AUTOGAS:

- Several references to LPG as having a role to play "in the transition towards the decarbonisation of the transport sector" (especially for shipping, HDVs and city buses)
- Calls upon the Commission to target life cycle and embedded emissions, "in order to ensure that upstream and downstream emissions do not erode the benefits related to the improved operational energy use of vehicles"
- Calls upon the Commission "to include the transport needs of citizens in rural and remote areas in its strategies for low-emission mobility"
- Emphasize on the need to encourage measures targeting the older vehicles, such as retrofitting

However, the EPP group (centre-right) did not manage to remove the clear call upon the Commission to "come forward with a proposal for a regulation on CO2 standards for car fleets entering the market from 2025 onwards, with the aim of phasing out new CO2-emitting cars".

Although this resolution does not have legal force, it could influence future legislative developments on EU policy on low-emission mobility. We will certainly use references to LPG and other key provisions in our advocacy on the Clean mobility package.

"THE WORK DONE AT THE LEVEL OF THE AUTOGAS COORDINATION GROUP IS EXTREMELY USEFUL FOR US, AS NATIONAL ASSOCIATION, TO BE AWARE OF THE CHALLENGES OTHERS ARE FACING THROUGHOUT EUROPE, AND LEARN FROM THEIR EXPERIENCES."

DR ILONA BEHREND
DEUTSCHER VERBAND FLÜSSIGGAS E. V.



CLEAN MOBILITY PACKAGE

IN 2017, THE EUROPEAN COMMISSION PUBLISHED TWO PACKAGES OF POLICY INITIATIVES ON MOBILITY. A THIRD PACKAGE IS EXPECTED IN MAY, 2018. WITH THESE INITIATIVES, THE COMMISSION AIMS AT ACHIEVING A SOCIALLY FAIR TRANSITION TOWARDS CLEAN, COMPETITIVE AND CONNECTED MOBILITY.

The so-called "Europe on the Move" package published in May contains several legislative and non-legislative proposals, accompanied by a non-binding communication that contains the priority of the European Commission for the transport sector. Main elements of interest for AEGPL are:

- Proposal to review the Eurovignette Directive.
- Recommendation on the use of the World Harmonised Light Vehicles Test Procedure (WLTP) for car labelling.
- Evaluation report on the Fuel Quality Directive

The second package released in November includes the following elements:

- A Commission Communication on "Delivering on low-emission mobility"
- A legislative proposal for new CO2 standards for cars and vans post-2020, with a focus on the supply low-emission vehicles to the market;

- A legislative proposal for the revision of the Clean Vehicles Directive to promote clean mobility solutions in public procurement tenders;
- An action plan and investment solutions for the trans-European deployment of alternative fuels infrastructure;
- The revision of the Combined Transport Directive, which promotes the combined use of different modes for freight transport (e.g. lorries and trains);
- The Directive on Passenger Coach Services, to stimulate the development of bus connections over long distances across Europe and offer alternative options to the use of private cars;
- A new initiative on batteries, as part of EU's integrated industrial policy to ensure that electric vehicles and their components will be invented and produced in the EU.

AEGPL has been engaging with several departments of the European Commission prior to the publication of the packages. Overall, the trend is clearly in favour of the electrification of the transport sector, little attention being dedicated to other alternatives such as gaseous fuels. However, there are some opportunities through the adoption process to negotiate a better outcome for Autogas. In 2018, AEGPL will finalise the position of the LPG industry and will bring it to key policymakers in the Council and the European Parliament. It is essential that these packages give full consideration to Autogas as a key part of the European transport future.



IMPLEMENTATION OF THE DIRECTIVE ON THE ALTERNATIVE FUELS INFRASTRUCTURE DEPLOYMENT

BY THE END OF 2017, ALMOST ALL MEMBER STATES HAVE SUBMITTED TO THE EUROPEAN COMMISSION THEIR NATIONAL ACTION PLANS (NPFs) IN APPLICATION OF THE DIRECTIVE ON THE DEPLOYMENT OF THE ALTERNATIVE FUELS INFRASTRUCTURE.

AEGPL has been supporting its members over the past year for advocacy on the definition of these governmental plans. Overall, the coherence, completeness and ambition vary greatly among countries. There is a strong focus on electromobility in these plans, in spite of which EU objectives as regards to EV infrastructure are not likely to be met. A majority of countries do not set targets for CNG. Almost all countries refer to LPG in the sections on the current state of play, recognising the fuel as part of the alternatives. Four countries are supporting LPG with infrastructure development targets or projections (Cyprus, Portugal, Spain and Hungary). Others have set out clear vehicle development targets (Spain, Hungary, Ireland, Italy).

In spite of the fact that the Directive does not recommend any infrastructure target for LPG, some countries have expressed their support for the fuel while most of Member States recognised its contribution.

ART-FUEL FORUM

AEGPL was accepted as an observer member of the Alternative Renewable Transport Fuels Forum, which aims at bringing together experts in the field.

It was established under the project: "Support for alternative and renewable liquid and gaseous fuels forum (policy and market issues)", and it is financed by the European Commission (DG Energy). This group is a useful forum to develop knowledge and influence future EU policy on transport fuels. Activities undertaken within this group so far have been related to the review of the Renewable Energy Directive as well as the post-2020 CO2 standards for cars and vans.



ONGOING WORK ON AUTOGAS STANDARDS

UNECE REGULATION 67 ON UNIFORM TECHNICAL PRESCRIPTIONS FOR WHEELED VEHICLES, EQUIPMENT AND PARTS

Throughout the year, AEGPL has been deeply involved in the Working Party on General Safety Provisions at the UNECE in Geneva, where many formal and informal papers were discussed on the topic of Regulation 67. The three AEGPL formally submitted papers were adopted as a supplement to 01 series and all will finally approved in WP29 March 2018 session. The first document related to LPG direct injection, inserting new safety provisions into UN Regulation No. 67 on LPG systems that have hydraulic interconnections with the petrol or diesel fuelling system through which inter-flows of fuels may occur, was adopted as it is. This is a great success for our industry and its sets the right precedent: it was accepted that LPG provides the same and even higher safety of operation as the other liquid fuel systems.

The second document prepared by the experts from the Netherlands and AEGPL to introduce the possibility to use non-seamless gas tube(s), gas tube(s) made of materials other than copper, stainless steel, and steel with corrosion-resistant coating, and their couplings in LPG vehicles was also adopted with some editorial corrections also as a supplement to 01 series. The third formal paper to amend the provisions on the type approval of accessories for LPG containers, which reduce the administrative burden and avoid the proliferation of accessories' type approval number while ensuring safety, was also adopted.

Discussions on other papers related to specifications for LPG multi-valves, provisions on the location on the vehicle of the filling unit and on the service life of LPG containers were postponed until the next session. AEGPL will coordinate with members to develop position and will engage with relevant experts to ensure the best possible outcome.

REVISION OF EN589 ON REQUIREMENTS AND TEST METHODS FOR MARKETED AND DELIVERED AUTOMOTIVE LPG

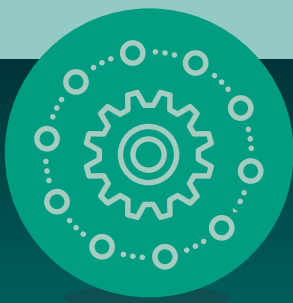
Work on the review of EN589 has kept AEGPL busy throughout 2017. Holger Blanke has been appointed as new convenor. The enquiry on prEN 589 resulted in a negative

vote and a second enquiry started in November 2017, and will end in February 2018. Main discussions touch upon the sulphur content and measurement method. Sulphur level in the revised standard is 30 mg/kg and the new sulphur measurement method will be balloted within CEN and introduced into EN 589, replacing ASTM D 6667 and ASTM D 3246. EN16423 for determination of dissolved residues was included in the revision and the existing EN 15470 and EN 15471 will be used only in case of dispute. Discussions on LPG's Octane number also took place, highlighting that it cannot be measured correctly and that there is no MON method available that describes LPG's knock behaviour. Moreover, there is no standardised procedure to calculate the methane content and that the improvement and modification of the RON measurement for LPG maybe a promising alternative.

There is a compromise around the establishment of a minimum propane content threshold at 20% (m/m) until December 2021, and 30% (m/m) from January 2022. However, some countries have called for a transition period in order to adapt logistics and contracts. The minimum propane content would in addition only be necessary for new vehicles. It is worth noting that OEMs keep pushing for a higher threshold.

In case a suitable test method for the MON can be developed before introductory dates, the group would consider the immediate replacement of the propane content threshold by the new performance test. The proposal was adopted in principle.

The standard on Qualification of Personnel, EN 16652 Part 2, related to competence profiles of personnel who carry out installation, repair and maintenance of Autogas systems is being finalized. A number of the earlier standards produced by this WG will be under review during 2018.



TECHNICAL, HSSE AND STANDARDISATION

KEY AREAS IN THIS FUNCTION INCLUDE THE DEVELOPMENT AND MAINTENANCE OF HEALTH, SAFETY AND TECHNICAL LEGISLATION THROUGH EUROPEAN DIRECTIVES AND REGULATIONS, ACTIVE CONTRIBUTION TO THE EUROPEAN (CEN) STANDARDISATION PROCESSES, SOURCING AND SHARING OF INFORMATION AND KNOWLEDGE ON TECHNICAL, SAFETY, SECURITY AND OPERATIONAL ISSUES AS WELL AS BEST PRACTICES AND INNOVATION.

TECHNICAL WORKING GROUPS

TRANSPORT RID/ADR/ADN

The role of the RID/ADR/ADN working group is to monitor and support the work carried out in the UN ECE RID/ADR/ADN Joint Meetings and related supporting activities and work groups. This activity is key in ensuring that the position of the European LPG industry is represented effectively in these gatherings and is reflected in the documents and the legislation produced.

BLEVE PREVENTION

This group works on the issue of prevention of Bleve by analysing incoming information and knowledge, liaising with external expert resources and preparing formal and informal discussions for the RID/ADR/ADN Joint Meetings and meetings with related ministries. Particular focus was

put in 2017 on Risk Assessment activities and the workshops organised by ERA, aiming to harmonise related Risk Assessment methodology in Europe.

INTERNAL INSPECTION OF CYLINDERS DURING PERIODIC REQUALIFICATION

Subject related to the Multilateral Agreement M255, Periodic inspection of LPG welded steel cylinders, signed by Italy and France, derogating the internal inspection of the LPG cylinders (ADR requirement) during periodic requalification and also to the scope of the RID/ADR/ADN working group on alternative methods for periodic inspection of refillable pressure receptacles. On the latter, the AEGPL proposals were accepted in 2017, to be reflected in ADR 2019. The group will consider the new ADR requirements to confirm the further scope of work and possible requests for ADR changes.

AEGPL INCIDENT/ ACCIDENTS REPORTING SYSTEM

AEGPL has since 2015 its own accidents reporting system. Statistics and data on LPG accidents are becoming increasingly important and at times absolutely necessary to serve as input in Risk Analysis studies, to demonstrate the safety level of the LPG industry and to avoid imposition to the LPG industry of unjustified regulatory measures. This activity is supported by an informal ad hoc Work Group. The importance of learning from accidents and taking effective corrective measures to avoid repetition is recognised by all and the members should be contributing to this process by informing AEGPL of significant LPG accidents.



GAS APPLIANCES REGULATION

BACKGROUND

AEGPL, SINCE 2009, HAS CONTRIBUTED TO THE REVISION OF THE DIRECTIVE, NOW A REGULATION. ALL AEGPL POSITIONS AND EXPECTATIONS WERE MET SATISFACTORILY LEADING TO THE RESULTED REVISION RELEASED IN 2016, NOW A REGULATION (GAR), ALIGNED TO THE NEW LEGISLATIVE FRAMEWORK (NLF).

Two guidance documents on the transition from the GAD (Directive) to the GAR (Regulation), were published in 2017.

By October 2017 all Member States had to comply to the GAR Article 4(1), by communicating to the Commission and to the Member States, the types of gas and corresponding supply pressures of gaseous fuels used on their territory, including also LPG.

A key concern in 2017 was how the Notified Bodies (NBs) would issue GAR certificates "overnight" on 20th April 2018. Another concern impacting also other Directives and Regulations, was the planned engagement of CEN consultants by the EU Commission, rather than by CEN as currently, risking possible loss of continuity and expertise.

A common market surveillance activity took place in 2017 on LPG hot plates and hobs for use in caravans, motor caravans, mobile homes and recreational crafts, where more than half of the controlled products were found not compliant.

The new GAR regulation EU 2016/426 is mandatory from 21st April 2018 (GAD 2009/142/EC to cease to apply) and all products placed on the market will be required to have a new EU type examination certificate. After that date, only products with EU type examination certificate according to GAR may be put on the market in EU.

POTENTIAL IMPACT

Any scope and interpretation changes in the GAD/GAR can impact LPG appliances and fittings or components in the market, causing potentially unnecessary administrative complications on the LPG sector and appliance manufacturers.

OUR POSITION

The Gas Appliances Regulation (GAR) establishes safety requirements to be put in place by Member States concerning gas burning appliances used for cooking, heating, hot water production, refrigeration, lighting and washing. AEGPL recognizes its importance and has been an active stakeholder in the development of its revision, transformation to European Regulation (GAR) and its interpretation. AEGPL will continue to follow closely all developments.



DIRECTIVE ON THE INLAND TRANSPORT OF DANGEROUS GOODS

& EUROPEAN AGREEMENT CONCERNING THEIR CARRIAGE BY ROAD

BACKGROUND

The European Agreement concerning the International Carriage of Dangerous Goods by Road (ADR) was signed at Geneva in 1957 under the auspices of the UNECE and entered into force in 1968, with the EU adopting uniform rules in 1994. The Directive on the inland transport of dangerous goods brought together all pre-existing EU legislation into a single text, and regulates now the transport of dangerous goods by road (ADR), rail (RID) or inland waterways (ADN) within EU countries.

BACKGROUND IMPACT ON OUR SECTOR

Transport is a key activity in the LPG industry with significant safety and cost implications. The ADR Agreement ensures that the industry operates safely and efficiently across the LPG distribution chain. Its scope covers transport in bulk and cylinders. AEGPL contributes to the legislative process through its presence in the UNECE RID/ADR/ADN Joint Meetings, WP.15 meetings and participation in related Working Groups. Through the development of LPG standards in CEN TC 286 and their referencing in ADR, AEGPL ensures that new technologies and new knowledge are fully reflected in the directive.

KEY ACTIVITIES AND ACHIEVEMENTS IN 2017

ALTERNATIVE METHODS FOR PERIODIC INSPECTION AND TESTING OF SOME TRANSPORTABLE LPG STEEL CYLINDERS

The years long efforts of AEGPL for acceptance of alternative methods for periodic inspection and testing of steel cylinders came to a successful end in 2017, with the acceptance of the AEGPL proposals. The increased support by country delegations and industry associations opened the way for alternative innovative methods and processes to find their

way in the gas industry operations in the future. Once more AEGPL, together with the ad hoc ADR working group, lead the way towards more effective and optimised practices. This result will be reflected in the ADR 2019.

APPROVALS OF LPG RELATED STANDARDS FOR REFERENCING IN ADR 2019

The nomination of a new CEN consultant and new chair of the RID/ADR Standards WG resulted in the reactivation of the processes towards approvals of standards for ADR 2019. Starting early-mid 2018, the CEN consultants will be engaged by the EU Commission rather than CEN as in the past. Standards approved in 2017:

- ✦ EN 1440:2016 +A1 [2018], LPG equipment and accessories – Transportable refillable traditional welded and brazed steel Liquefied Petroleum Gas (LPG) cylinders – Periodic inspection
- ✦ EN 16728:2016 +A1 [2018], LPG equipment and accessories – Transportable refillable LPG cylinders other than traditional welded and brazed steel cylinders – Periodic inspection

RAIL TRANSPORT SAFETY, RID

The focus on Rail Transport Safety initiated in 2016 related to transport of gases, continued also in 2017. AEGPL participated and contributed in the meetings organised by the Italian Ministry related to the inspections of rail wagons (inspections checklists) at loading and unloading sites in order to ensure the integrity of these wagons while in transport.



**“BEING A MEMBER OF AEGPL
ALLOWS US TO BE INVOLVED IN ALL
TECHNICAL MEETINGS, PARTICIPATING
IN NEGOTIATIONS OF NEW TECHNICAL
REGULATIONS AND BEING PART OF
THE PROCESS OF ASSURING THAT
OUR INDUSTRY APPLIES THE HIGHEST
SAFETY STANDARDS.”**

FILIPPO DE CECCO
ASSOGASLIQUIDI

DOCUMENTS SUBMITTED BY AEGPL IN 2017

Various documents were submitted during the March and September meetings all in support of the “Alternative methods for periodic inspection of refillable pressure receptacles” that resulted to the acceptance finally of the AEGPL positions, to be reflected in ADR 2019.

In addition, supporting work was verbally presented in relation to Bleve prevention documents that were treated.

WORKSHOPS ON RISK MANAGEMENT IN THE CONTEXT OF RAIL, ROAD AND INLAND WATERWAYS ON TRANSPORT OF DANGEROUS GOODS

AEGPL continued its active participation in the ERA organised workshops, an activity closely related to the work of Bleve prevention and analysis and management of associated safety risks.

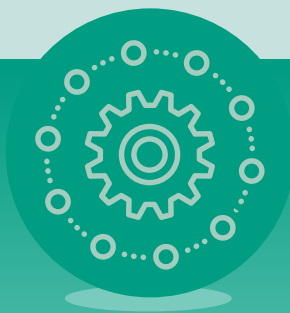
A large number of experts attended the three workshops from national authorities, private sector, international organizations and EU Commission.

The first phase of the work terminates early 2018 with the completion of guides on ‘Risk Estimation’ (including also ‘Data Management and Reporting Regimes’) and ‘Risk Management and Decision-Making’. Subsequent phases will follow that may lead to a future multimodal

Directive towards 2025. This will enable harmonized risk-based decision making and reconciliation of local and regional practices.

EXPERTISE SHARING WITH THE WIDER INDUSTRY

Further focus was put again in 2017 in strengthening the sharing of expertise with other industry associations in the technical and safety area, namely CEFIC, EIGA, ECMA and others. Various projects and activities enjoyed the input of common expert resources to coordinate approach in key issues.



CEN/ISO STANDARDISATION

AEGPL ACTIVELY SUPPORTS LPG RELATED HEALTH, SAFETY AND TECHNICAL STANDARDISATION PROCESSES IN PARTICULAR THOSE RELATED TO THE EUROPEAN PROCESSES (CEN).

The AEGPL sponsors the LPG dedicated Technical Committee CEN TC 286 "Liquefied Petroleum Gas Equipment and Accessories" responsible for standardization of LPG pressure equipment and their accessories, covering design, manufacture, inspection, testing and operational requirements. The committee prepares standards in line with the essential requirements of relevant EU Directives. The relationship in Europe between standards and legislation makes the work of TC 286 of paramount importance in terms of safety and costs to the LPG business.

The AEGPL Technical Manager ensures effective guidance to the committee in the best interest of the AEGPL members. Support of the standardisation process involves also monitoring other LPG related standardisation committees such as TC 181, TC 296, TC 23 and TC 208.

The chairman of the committee is Mr. Tim Barnett. AEGPL is represented by its Technical Manager, Nikos Xydias, as well as through its members across Europe. Each year, TC 286 holds its plenary meeting in spring, to review the year activity and agree the program of the following year. In 2017 the meeting was held in Berlin in May, hosted by the German LPG Association DVFG. It was attended by 20 experts, from 11 countries, Cyprus, Finland, France, Germany, Greece, Ireland, Italy, Poland, Portugal, Spain and United Kingdom.

The committee went through significant changes in 2017. A new secretary Alice Hanly was appointed, Alberto Castagnini of Assogasliquidi / Landi Renzo replaced Salvatore Piccolo as convenor in WG6, Olivier Aubertin of CFBP replaced Henri Francois as convenor of WG7 and a formal replacement of the convenor of WG5 is also expected following the departure of Dr. Nick Hector.

WG 1 WORKING GROUP 1

has responsibility for the design and manufacture of LPG pressure vessels (Convenor Dr. Tony Neale, Calor)

WG 2 WORKING GROUP 2

has responsibility for the design and manufacture of accessories for vessels designed by Working Group 1 (Convenor Mr. Paul O'Connell, Flogas)

WG 5 WORKING GROUP 5

has responsibility for the operational requirements of the transport of LPG in tanks by road or rail (Convenor: to be appointed)

WG 6 WORKING GROUP 6

has responsibility for automotive LPG systems (Convenor Mr. Alberto Castagnini, Assogasliquidi - Landi Renzo)

WG 7 WORKING GROUP 7

has responsibility for operational requirements for both transportable LPG cylinders and static customer tanks (Convenor Mr. Olivier Aubertin, CFBP)

WG 8 WORKING GROUP 8

has responsibility for producing a standard for the requirements for the design, installation and subsequent maintenance of LPG pipework systems (Convenor Mr. Richard Turski, BP Europe SA).

WG 9 WORKING GROUP 9

has the responsibility for producing standards on LPG under the Recreational Craft Directive (Convenor Mr. George Nikolaou, AEGPL).

WG 10 WORKING GROUP 10

has the responsibility for producing an Environmental document that can be referenced by all TC 286 standards (Convenor Mr. Joao Ferreira, ITG)

WG 11 WORKING GROUP 11

has the responsibility for producing a Technical Specification containing all the definitions to be used in Tc286 standards (Convenor Mr T.Barnett, AEGPL)



STANDARDS ISSUED IN 2017 BY THE AEGPL-SPONSORED CEN TC 286 TECHNICAL COMMITTEE

- + EN 13110:2012+A1:2017 LPG equipment and accessories. Transportable refillable welded aluminium cylinders for Liquefied Petroleum Gas (LPG) - Design and construction
- + EN 13952:2017 LPG equipment and accessories. Filling operations for LPG cylinders
- + EN 1439:2017 LPG equipment and accessories. LPG equipment and accessories. Procedure for checking LPG cylinders before, during and after filling
- + EN 1442:2017 LPG equipment and accessories. LPG equipment and accessories. Transportable refillable welded steel cylinders for LPG - Design and construction

ISO STANDARDISATION ACTIVITIES, TC 58 (GAS CYLINDERS)

AEGPL, together with the WLPGA, continued the monitoring of LPG related ISO standardisation, through the annual plenary meetings of the ISO TC 58 Technical Committee and subcommittees on Design, Fittings and Operational requirements.

AEGPL: A HELPDESK FOR THE EUROPEAN LPG SECTOR

The technical helpdesk continued offering its services to the AEGPL members through 2017, amongst the subjects handled in 2017:

- + Tanker drive-away protection, interlock systems
- + LPG leak detectors and CO detectors regulations, requirements & recommendations
- + Local Regulations on patio heaters in Europe
- + Piping materials for LPG connections inside the house
- + Vapourisation rates of small LPG cylinders
- + Security & anti-terrorism measures, LPG and other Dangerous Goods products / activities
- + Polyethylene Pipe life span for use underground for low and medium pressure

**"IT IS CRITICALLY IMPORTANT
THAT TECHNICAL AND SAFETY
STANDARDS AND REGULATIONS ARE
CO-ORDINATED ACROSS EUROPE
AND THAT THE INDUSTRY'S VOICE
IS HEARD BY REGULATORS. THE
AEGPL TECHNICAL CO-ORDINATION
GROUP PROVIDES EXACTLY THAT
KNOWLEDGE, EXPERTISE AND
INFLUENCE TO DO THIS"**

RICHARD HAKEEM
UKLPG

OUR COMMUNICATION ACTIVITIES



The work developed by AEGPL in advancing the LPG agenda next to decision makers was recognized with two awards in 2017.

The European LPG Association was attributed the title of "Ambassador of Alternative Fuels" at the Alternative Media Fest, in Croatia. The AEGPL was also recognized as the "Most Active LPG Association" at the Oil & Gas Summit in Azerbaijan.

LPG FOOD TRUCK

The AEGPL has taken the Food Truck project one step further in 2017. In 2016, together with our members Antargaz and Greengear, we engaged in the conversion and sponsoring of a popular Brussels food truck into LPG.

The project consisted in identifying a food truck that was popular and well known, and that would regularly service the area where the European Institutions are located. Once that was done – the Urban Cook food truck was chosen – the AEGPL members generously contributed with their products making possible for the food truck to rely solely on LPG for power generation and for cooking.

In 2017 we have invested in branding two more food trucks from the same company, elevating the total of food trucks advertising the benefits of LPG in Brussels to three. The food trucks now visit the EU quarter twice a week and participate in festivals of street food. AEGPL produced posters, leaflets and other materials to brand the food trucks with a message highlighting the environmental benefits of LPG. As such, as hungry customers queue for their tasty burgers, they are exposed to the images of AEGPL and its partners, and learn about the benefits of LPG.



EXTERNAL COMMUNICATIONS

AEGPL IS THE VOICE OF ITS MEMBERS AND, AS SUCH, WE HAVE CONTRIBUTED, DURING 2017, TO SEVERAL MEDIA PUBLICATIONS AND CAMPAIGNS WITH THE OBJECTIVE OF PUSHING OUR MESSAGES TO THE RELEVANT AUDIENCES.

AEGPL NATIONAL LPG ASSOCIATION ADVOCACY AWARD

2017 WAS ALSO THE YEAR OF THE FIRST EDITION OF THE AEGPL NATIONAL LPG ASSOCIATION ADVOCACY AWARD.

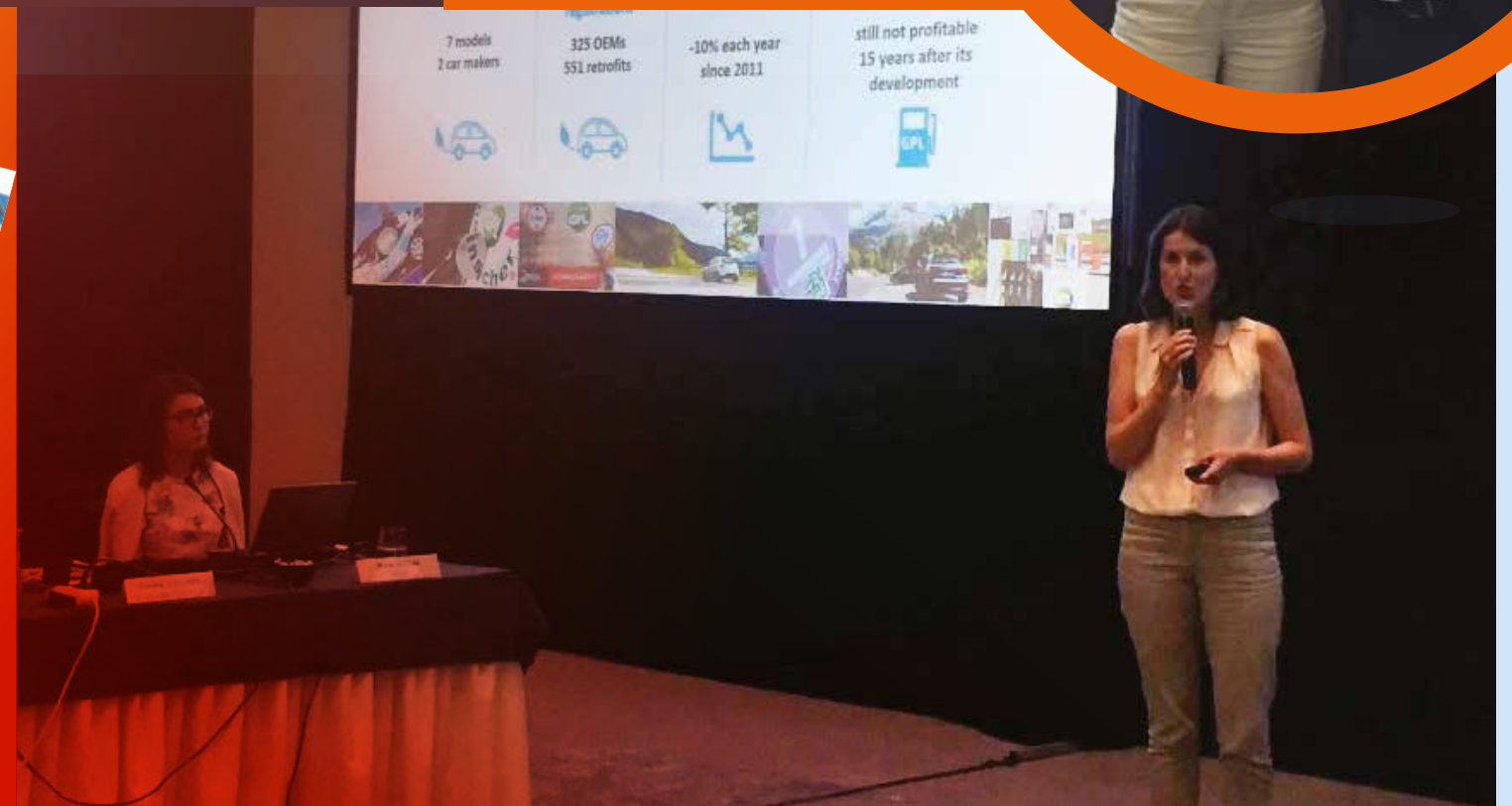
This annual recognition will reward advocacy campaigns put forward by national LPG associations that highlight the benefits of LPG and that advance the LPG industry's goals.

The winner of the first edition of the award was the French national association CFBP - Comité Français du Butane et du Propane - whose Autogas awareness campaign was recognised and praised by the Jury. This campaign focused reaching out to different audiences: Policy Makers; Car Makers; and General Public.

EMILIE COQUIN from the CFBP receives the AEGPL National LPG Association Advocacy Award from the hands of AEGPL's General Manager Samuel Maubanc



PUBLICATIONS



AEGPL CONGRESS 2017

THE 2017 AEGPL CONGRESS TOOK PLACE AT THE LISBON CONGRESS CENTRE IN PORTUGAL, FROM THE 21ST TO 22ND JUNE.

Lisbon is frequently admired for the charming atmosphere of its streets and its Southern tastes and sounds. AEGPL selected this captivating city to host the most significant LPG annual event in Europe. Under the theme "Embracing Change", experts from across the sector debated innovative solutions and strategies to maximise the benefits of LPG. The Exhibition area gathered over 80 companies who developed new business relationships. The participants of the Lisbon Congress networked and relaxed at the classy side events organized at the Red Cross Palace and in Estufa Fria. Next stop: Monaco in 2018!

12000

TOTAL ATTENDEES

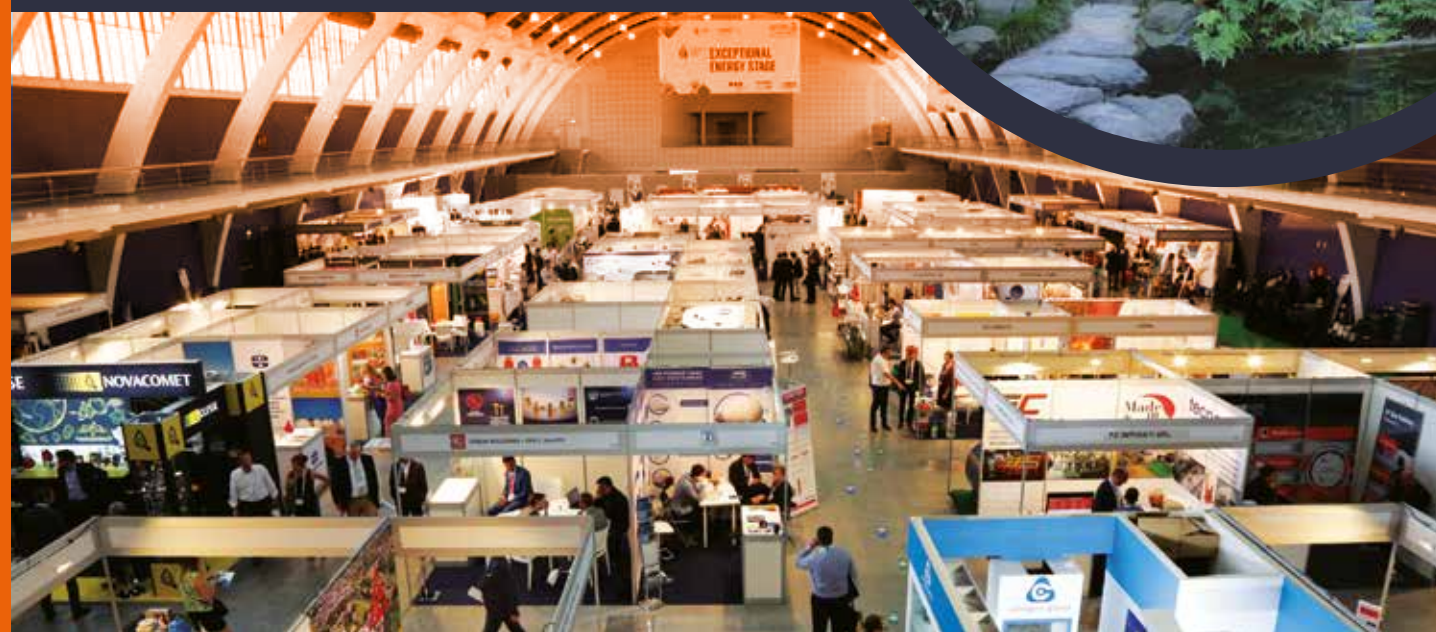
130

EXHIBITION BOOTHS



31%

HIGH LEVEL SPEAKERS, IN PARTICULAR 1/3 WERE WOMEN



AEGPL MEMBERS 2018

AEGPL MEMBERS 2018

National Associations

AUSTRIA

Österreichischer Verband für Flüssiggas (ÖVFG)
www.fluessiggas.eu



BELGIUM AND LUXEMBOURG

Federatie Butaan Propaan/Federation
Butane Propane (FeBuPro)
www.febupro.be



CZECH REPUBLIC

Česká asociace LPG (CALPG)
www.calpg.cz



DENMARK

Energie-og Olieforum (EOF)
www.eof.dk/LPG.aspx



FRANCE

Comité Français du Butane
et du Propane (CFBP)
www.cfbp.fr



GERMANY

Deutscher Verband Flüssiggas (DVFG)
www.dvfg.de













HUNGARY

Magyar PB Gázapari Egyesület (MPE)
www.mpe-pbgaz.hu




National Associations

IRELAND	Irish LP Gas Association (ILPGA) www.ilpga.ie	
ITALY	Assogasliquidi Federchimica www.assogasliquidi.federchimica.it	
NETHERLANDS	Vereniging Vloeibaar Gas (VVG) www.vvg-nederland.nl	
NORWAY	Drivkraft Norge www.drivkraftnorge.no	
PORTUGAL	Associação Portuguesa de Empresas Petrolíferas (APETRO) www.apetro.pt	
SLOVENIA	GIZ UNP	
SPAIN	Asociación Española de Operadores de Gases Licuados Del Petróleo (AOGLP) www.aoglp.com	
SWEDEN	Energigas Sverige www.energigas.se	
UKRAINE	Ukrainian LPG Association (ULPGA) www.uasg.com.ua	
UNITED KINGDOM	UKLPG www.uklpg.org	

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	Cavagna Spa. www.cavagnagroup.com		Rego www.rego-europe.de
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	Cotrako S.R.L. www.cotrako.it		Sensile Technologies www.sensile.com
	Croatian Chamber of Economy www.hgk.hr/english		Sibur International www.sibur-int.com
	GLI International www.gli-gaz.com		Voigt www.voigtsoftware.com
	Hexagon Ragasco www.hexagonragasco.com		World LPG Association www.wlpga.org
	IHS Markit www.ihsmarkit.com		



www.aegpl2018.com





2017

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LPG
EXCEPTIONAL
ENERGY