

## **88<sup>th</sup> WLGA INDUSTRY COUNCIL MEETING**

**Tuesday 18<sup>th</sup> June 2024**

**09:30am - 13:00pm**

**Academie InterContinental Hotel, Lyon, France**

**Please refer to attached slides throughout and to actions and outcomes at the end of the minutes.  
A list of participants is also at the end of these minutes.**

### **1/ Welcome and Approval of Draft Agenda and Minutes of Last Meeting**

Mr Bertelli opened the meeting thanking everyone for their support and this opportunity, being his first IC meeting as WLGA President. The industry in Brazil is both mature and he also sees the opportunity to embrace renewable Liquid Gas. LPG as a traditional fuel still has a great deal of opportunity in Brazil which will be discussed later today.

### **2/ Restatement of WLGA Anti-Trust Guidelines**

Mr Rockall stated the anti-trust guidelines and that the meeting will be recorded. The agenda for this meeting and the minutes of the last meeting which took place in Washington DC, USA on 21<sup>st</sup> February 2024, were approved.

### **3/ Safety Moment**

Mr Appleton gave the safety moment. Whilst Argus Media do not deal with safe handling per se, for Argus Media, it is more checking in physical and mental well-being. The single biggest factor for men under the age of 50 dying is suicide. As Argus Media has grown, they have started to run programmes to ensure mental health and well-being is covered, including a 24hr confidential counselling assistance available around the world. Mr Appleton encouraged other companies to ask for this type of support service.

### **4/ 2024 Status and Planning**

Mr Rockall gave an update on the 2024 Action Plan. See slides for details.

Mr Rockall asked for help with member development.

### **5/ Advocacy (ADV)**

Ms Busscher opened the Advocacy Session.

Concerning clean cooking, Mr Kelly presented feedback following the IEA conference which took place in Paris 14<sup>th</sup> May, WLGA's role in the event and the unprecedented level of support for LPG. He outlined the resulting deliverables (see slides). Mr Kelly invited other IC members to join the Cooking For Life Africa Task Force (CFLA) which is open to IC members and for which there is a fee, although non-IC members may join on an ad-hoc basis, especially if they have specific knowledge. This helps fund additional activities and leverage the impact of this event. The first deliverable will be a Road Map for LPG in Africa to be launched at COP29.

Ms Busscher commented that looking at the milestones, would it be appropriate to launch a Just Energy in Clean Cooking Task Force to embrace the potential in LATAM, and launch this during LPG Week 2025 in Rio, similar to the Just Energy Heating Task Force, which focusses on Europe and North America. The IEA project does indeed focus on sub-Saharan Africa because in Asia this process is already happening and being driven by government such as India. In LATAM it is very localised, affecting pockets of population rather than entire countries.

Mr Covas from S&P Global introduced the Africa Road Map. This is planned to be launched during COP29. See slides for detail.

Mr Ferreira noted that in Brazil around 10% of people still cook with wood, even though the infrastructure is relatively solid, but LPG is not affordable for low-income people and they have a good story to share. Mr Covas answered that African clients always want to know what is happening in Latin America, as often LATAM countries experience a similar growth trajectory as African countries, S&P has Brazil at the top of the case study list. Affordability and accessibility are key.

Mr Calcano said that we should also not forget culture. Even with the best programmes we cannot easily change the people's culture and asked what is being done to change the culture to switch from firewood because of the flavour. Mr Kelly replied that educating children can help, working with governments to emphasise the importance of educating children, especially girls but this is a process that will take time. There is a great deal of work being done by NGO communities and governments in this respect.

Mr Appleton commented that he was unclear on what the funds announced during the IEA Summit will be used for and what is the role of WLGA? Mr Kelly answered that some was pledged from companies with a specific target, e.g. Total Energies' pledge to double their investment in Sub-Saharan Africa. There were also pledges from governments and institutions and we do not yet know what these investments will look like, IEA are monitoring these investments. Concerning the role of WLGA, this is not to reduce costs, but if we can improve the business environment in a country and advise governments how to manage infrastructure then this can reduce the cost of the produce in the longer term.

Mr Cavas added that in this first phase, they would not want to focus on a country where it would involve changing the mindset of the population, but rather prioritise markets where the population actively want LPG. Affordability is the key issue, often people may have the same goal but lack clarity on policies and what is required by an investor, and this is also our role.

Mr Kelly gave an overview of the WLGA's renewable Liquid gas campaign managed in tandem with fellow associations and FTI (see slides).

Mr Scharr asked whether we work with Atlantic Consulting? Mr Kelly replied that we do work with them, and they support on the technical side and with fact checking.

Ms Busscher closed the session stating we must also include the cultural dimension and feedback with this new task force to make it a solid public/private partnership.

## **6/ Communications and Awareness (COM)**

Ms Abbott welcomed everyone to the meeting and gave apologies for Mr Aguirre who was not able to attend.

Ms Abbott presented a series of media scenarios and presented the WLGA response (refer to slides). She stated that each response must be done on a case-by-case basis and that the response come quickly as otherwise the news cycle will move on. In addition, WLGA will respond in tandem with a national or regional association depending on the case.

Mr Calcano noted that usually when a journalist 'attacks' they have a very narrow focus, with limited concrete data and only want to get their comment across. With the more robust and broad data that

we have, we can be in a better position to respond and weaken or disprove the point being made by the journalist but in a polite and positive way.

Ms Abbott spoke about social media and how WLGA positions itself and respond to trolling. She also reported on LPG Day, 7th June which this year generated some 2.66 million impressions, a 365% increase on 2023. The increasing amount of interaction means that increasing numbers of negative responses are anticipated. If negative content becomes overwhelming, then the post will be taken down. Ms Abbott noted that LinkedIn seems to have a more professional and less emotional profile and is not as prone to trolling.

Ms Abbott also spoke about the real physical challenge to events and meetings from more radical groups such as Extinction Rebellion and Just Stop Oil and the steps needed to be prepared for any activity. See slides.

The Communications Team is also launching a Narrative Refresh project which is a three-phase review of WLGA's messaging, website and social media channels. This ties in with the rename of the association and will enable a more positive brand identity to help WLGA better engage with external audiences. This is a strategic exercise to guide how we position the association and the role of liquid gas more broadly. The results of this initiative will be delivered in Cape Town.

Ms Assous gave an update on LPG Week and encouraged everyone to register for Cape Town and sponsor the event. See slides for update on sponsors and forthcoming editions of the event including the new logo for Liquid Gas Week 2025. Ms Assous thanked those companies who have already confirmed sponsorships for 2025.

Ms Abbott closed the session.

## **7/ Sustainable Growth and Innovation (SGI)**

Mr Zeigler opened the session commenting that he senses a divide within the industry concerning decarbonisation but believes we can overcome this divide in a sensible way and believes this can be done. He personally commits to a decarbonised lifestyle, and his company is also committed to decarbonisation and has a progressive decarbonisation strategy and aims to grow their LPG business by 50% to 2030. He feels the biggest threat is that LPG could lose its licence to operate both from a societal and regulatory standpoint. There is no one-size-fits-all solution, but we do need to develop a strong and credible narrative to describe the role of LPG in a low carbon energy system.

Mr Xydias outlined the agenda for the session and invited everyone to communicate around the Global Technology Conference (GTC) and Global Science Conference (GSC) and encouraged submission of papers.

Mr Mir gave an update on Renewables Working Group activities and the four project workstreams (see slides). He noted that Atlantic Consulting are part of this team and working as a Technical Consultant, in response to a previous question.

Mr Hallett gave an update of the rDME Working Group, including key milestones, progress to date and full project dashboard. He noted that he is confident of the outcome of these discussions.

Mr Ferreira asked about UN standardisation? Mr Hallett replied that these are not technical challenges but related to how this should be administered within the UN, now DME is listed as a special provision and optional opt in or out. There are various views on how it should be integrated, they are currently following a special provision within gasoline which allows to mix up to 10% Ethanol and gasoline.

Mr Scharr commented that the German association have started a project with the German Standards Centre to integrate rDME into the German technical regulations. They require higher blends in Germany, starting with 15% and ending with 65%.

Mr Mir presented the renewable liquid gas pathways and projections and study results (see slides), asking to note that these figures may change.

Mr Xydas noted that the importance of DME in the total picture to 2050. Mr Rockall asked what limits the upside the potential to 2050, why are we not seeing higher volumes? Mr Mir replied it is most likely the pace of development, taking into account the differing policy support around the world, there is a faster pace in north America and Europe, but slower in Africa.

Mr Ugboma commented that one useful metric would be if we have 50 MT by 2050, what does that represent in dollar terms and investment, and where would that funding come from? Mr Mir said we have not yet looked at this metric and it is not part of the study scope, having been more focussed on messaging, but we can look to pick this up at a later date.

Mr Zeigler presented the Decarbonisation Road Map or Net Zero Roadmap. This process is about becoming credible in terms of carbon, and the story for Europe is different to the story for the global south, as is the story for the US and Asia. He presented the first building blocks and mapping. The proposal is to set up a separate working group and also produce an initial white paper in the coming weeks. Mr Zeigler asked for nominations from IC members for the working group and white paper content.

Mr Rogers whether this will be a living document or a white paper? Mr Xydas replied that work on all decarbonisation issues is regularly updated as we keep learning. Mr Zeigler recommends that we keep this internal to the industry and have consensus within the industry before releasing to a wider audience.

Mr Rockall asked if we are creating a roadmap from A to B, so for A will we do a baseline study of current emissions, and what is B and should we set ourselves a target or leave this more vague? Mr Xydas responded we still need to decide if we go to net zero or a decarbonisation path? Mr Zeigler commented that regulation to net zero means we orient ourselves to the regional regulations and also what is technically feasible. However, progress is slow, and we cannot be a one technology story. Mr Rockall noted that for the baseline story, if LPG is a decarboniser, will we look at baseline from the perspective of market opportunities as well? Mr Zeigler replied that there are four definitions of scope, with four being replacement of higher carbon alternatives which could be feasible for some geographies but we need to be credible and maybe refer to external sources.

Ms Busscher commented that concerning emissions for scope four, you cannot talk about them in the climate change mitigation, but you can discuss from an access to energy perspective, and there is increased interest to talk about emissions but it needs to be in tandem and the role of WLGA from a communications perspective must be to keep telling the story.

Mr Munson introduced the Strategic Innovation Summit 2025 which will take place January 2025 in Paris (targeting January 27-30<sup>th</sup>).

Mr Zeigler asked for any feedback on the issues discussed and closed the session.

## **8/ Safety and Business Improvement (SBI)**

Mr Tyler opened this session on behalf of Mr Edja who sent apologies.

Mr Tyler gave an update on the Core Safety Group and shared details of safety incidents (see slides). The proposal is to go further with sharing of incidents, and asked if the IC be comfortable on anonymously sharing details of incidents that have taken place within their company. WLGA would then document and produce a document with benchmarking advice. There is support for this but aware that there could be sensitivity around this.

Mr Dreier commented he has nothing against sharing, as long as it is not an overwhelming amount of work, so WLGA must clarify what kind of information they are expected to share, and we should also consider GDPR issues. It is more important to share the learnings than the incidents. Ms Kartalian commented it is complicated to manage third parties and we need to change the culture.

Mr Tyler introduced the new Guide for Cylinder Ownership Maintenance and Filling, this report accompanies several existing reports on cylinders. This report will include a toolbox which will reflect much of what we have already reported on and will include an updated survey from 15 countries surveyed ten years ago including new countries. Mr Tyler asked if any other countries might wish to be represented.

Ms Abbott discussed the Diversity initiatives. Concerning WINLPG, this is a continually growing network and there will be two new chapters launched this year, Türkiye next week and Chile in August bringing the total to 13. She also mentioned that the 2024 awards are open and encouraged members to apply. For the Youth Council, Mr Azevedo gave an update on the three pillars of activity in particular safety (see slides).

Ms Busscher commented that it is important to keep the Youth Council momentum and motivation high, and suggested that Mr Rockall could hold a senior leadership exchange opportunity with Youth Council members. Ms Abbott encouraged the IC to bring their Youth Council representatives to LPG Week. Mr Rockall commented that he is keen to bridge the gap between the Youth Council and Industry Council and give them more visibility. Mr Scharr commented that the pillars covered seem 'basic' and should we integrate the group more into the strategic output of WLGA rather than the 'day to day basics'. Ms Abbott commented that this will be noted.

Mr Tyler closed the session on behalf of Mr Edja.

## **9/ President's Summary and Comments**

Mr Bertelli thanked everyone for attending. This is the second year of the current three-year plan and it is interesting to see how these range of topics are increasingly connected. We see challenges but opportunities for our future which bring more value to the association.

## **10/ Date and Place of Next Meeting**

The next Industry Council meeting will take place on Tuesday 19<sup>th</sup> November in Cape Town, South Africa.

## **Key Outcomes and Actions**

- Mr Rockall asked for help with member development.
- Ms Busscher asked whether ADV should launch a Just Energy in Clean Cooking Task Force to embrace the potential in LATAM, and launch this in Rio.

- Mr Xydas invited all members to communicate the GTC and GSC to their networks and encouraged submissions.
- Mr Zeigler asked for nominations from IC members for the Decarbonisation Road Map project working group and white paper content.
- Mr Tyler proposed further sharing of safety incidents and asked whether the IC would be comfortable on anonymously sharing on incidents that have taken place within their company.
- Mr Tyler asked if any other countries might wish to be represented in the new survey for cylinder management best practices.
- Mr Rockall to consider holding a senior leadership exchange opportunity with YC members.
- Ms Abbott encouraged the IC to bring their Youth Council representatives to LPG Week.

## Participants

Mr T Bertelli	Ultragaz and WLGA President
Ms E Abramiuk-Lété	Liquid Gas Europe
Mr M Arahata	Japan LP Gas Association
Mr D Appleton	Argus Media
Mr M Azevedo	Amtrol-Alfa Worthington Enterprises
Ms E Busscher	SHV Energy
Mr A Calcaneo	OPIS
Mr D Cavagna	Cavagna Group
Ms M Cavanga	Cavagna Group
Mr F Covas	S&P Global
Ms G Borisova	S&P Global
Vivian de Souza Gasperino	Ultragaz
Mr Z Dikmen	Cavagna Group
Ms S di Domenico	Cavagna Group
Mr M Dreier	UGI International
Mr A Ferreira	Ultragaz
Mr T Genthialon	Petredec
Mr S Hallett	Dimeta
Ms G Kartalian	SHV Energy
Ms J Leegstra	SHV Energy
Mr T Oliveira	Amtrol-Alfa Worthington Enterprises
Mr F Pedrosa	Amtrol-Alfa Worthington Enterprises
Mr D Rogers	S&P Global
Mr R Scharr	Friedrich Scharr KG
Pedro Sousa	Amtrol-Alfa Worthington Enterprises
Mr K Tanaka	Japan LP Gas Association
Mr F Ugboma	Dimeta
Mr F Ziegler	DCC Energy

## Online

Mr R Donaldson	Targa Resources
Mr W Menezes	BW Epic Kosan
Mr R Mir	Futura Fuels
Dr R Boudreaux	Oberon Fuels

**WLGA (alpha)**

Ms A Abbott  
Ms E Assous  
Mr M Kelly  
Ms M Milate-Maschino  
Mr C Munson  
Mr J Rockall  
Mr D Tyler  
Mr N Xydas

**WLGA Online**

Ms T Donaldson  
Ms A Ginsz

**Attached:**

Slides presented

## WELCOME



- 88<sup>th</sup> INDUSTRY COUNCIL MEETING
- Tuesday 18<sup>th</sup> June 2024
- 09:30 - 13:00 CEST
- Soufflot Room
- InterContinental Hotel,
- Lyon




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# Welcome


From the WLPGA President



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## • Agenda

1	Welcome and approval of Draft Agenda and Minutes of Last Meeting (Washington DC, 21 <sup>st</sup> February 2024)	10 min	T. Berthel
2	Restatement of WLGA anti-trust guidelines	1 min	J. Rockall
3	Safety moment	5 min	D. Appleton
4	2024 status and planning	14 mins	J. Rockall
5	Advisory (ADV) - Cooking for Life Africa - outcomes of IEA summit - Advocating for renewable Liquid Gas	30 min	E. Buscher
6	Communication and Awareness (COM) - Dealing with media - WLGA narrative refresh - LPG Week planning	30 mins	C. Agurne
<b>Coffee break</b>		30 mins	
7	Sustainable Growth and Innovation (SGI) - Update on ICG activities - Outcomes from ICG projections study - Roadmap to Net Zero - Strategic Innovation Summit 2025	45 mins	F. Ziegler
8	Safety and Business Improvement (SBI) - Good Industry Practices - Managing Cylinders - Updates from the Youth Council	30 min	D. Tyler for B. Edge
9	President's summary and comments	10 min	T. Berthel
10	Date and place of next meeting	1 min	J. Rockall



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## Safety Moment

David Appleton - Argus





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## Mental health and wellbeing is every bit as important as physical safety

**Employee Assistance Programme**

- ✓ 24/7 Counselling and advice
- ✓ 100% confidential
- ✓ Any topic – family, financial, work-related
- ✓ Multiple sessions on individual topics

**Calm App, WorkLife Central**

- ✓ Meditation/mindfulness
- ✓ Physical well-being
- ✓ professional and personal coaching



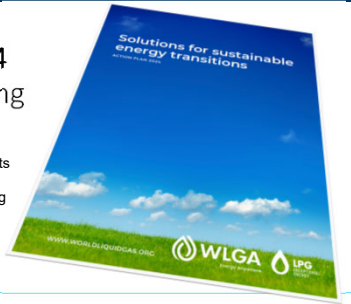




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## Action Plan 2024

### status and planning

- 39 projects across four goals
- 20 measurable quarterly targets
- €650k of core funding
- c. €1,000k of additional funding on renewables





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### Highlights 2024

- ✓ Major advocacy success with IEA-organised Clean Cooking for Africa launch in Paris
- ✓ Task Force formed to coordinate our industry response
- ✓ Major campaign Liquid Gas completed
- ✓ Very successful strategic innovation summit held in Washington DC
- ✓ rLG deliverables on target
- ✓ LPG Week Cape Town progressing well
- ✗ Membership development under target



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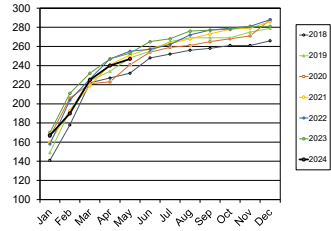
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### Member payment history 2024

⊖ 2024 membership payments are slightly behind last year

- Change in bank account?

✓ IC members increased to 44



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### Membership development 2024

**In 2024:**

6 new members including:

- One A category
- Two B category
- Three C category

Four new Industry Council Members:

- Friedrich Scharr KG, Germany
- Likitgaz, Turkey
- OPIS, USA
- Tomza, Mexico

**Member development needs focus**


**Targets for 2024:**

- A category +1
- B category +5
- C category +10
- Industry Council 44

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### Reserves position



Total reserves remain well above the minimum

- ✓ Cost management
- ✓ Strong membership development
- ✓ Commercial (LPG Week) revenue on/above target
- ✓ SARL reserves close to zero – need to rebuild


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**Esther Busscher**  
**SHV Energy**


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Advocacy Chair



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### Cooking For Life Africa



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### IEA CLEAN COOKING IN AFRICA SUMMIT, 14<sup>TH</sup> MAY 2024

- Largest clean cooking event ever held
- Approx 1000 delegates, 4 Heads of State, 23 Ministers, 55 government delegations, UN Secretary General, WHO Executive Director

Energy summit seeks to curb cooking habits that kill millions every year

Le Monde: Summit on Clean Cooking in Africa seeks to address women's and climate issues

Routers: Inaugural Africa clean cooking summit sees \$2.2 bn pledged

Financial Times: IEA Africa clean cooking summit aims to curb deaths from air pollution

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### WLGA'S ROLE

- WLGA asked by IEA to coordinate and represent the LPG industry
- WLGA created the **Cooking For Life Task Force (CFLA)** as a platform for the LPG industry participation in the Summit and subsequent follow up
- 1st big deliverable of the CFLA will be a Road Map for LPG in Africa that will be launched at COP29 in Baku

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### SOME MILESTONES

Timeline of milestones:

- 2024/CAPE TOWN: G20 BRASIL 2024, COP29 Baku Azerbaijan, LPG WEEK 18-22 NOVEMBER
- LPG Week 2025 Rio
- 2025: G20 2025 South Africa, COP30 BELEM BRASIL 2025

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### COOKING FOR LIFE AFRICA (CFLA) MEMBERS

Members:

- equinor
- ORYX ENERGIES
- TotalEnergies
- Petredac
- S&P Global
- AMTROL-ALEFA
- WORTHINGTON ENTERPRISES

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### CFLA MEMBERSHIP

- Open to all Industry Council members
- Supplemental fee to cover annual budget for activities and projects. Costs are shared equally by CFLA members
- Non-Industry Council members can be invited to join on an ad-hoc basis

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### CFLA DELIVERABLES

#### Communications

- Communications project launched to promote WLGA and LPG during the Summit
- Comprehensive social media campaign
- Engaged with media including:

- Bloomberg
- Financial Times
- Le Monde
- ESI
- Reuters
- Forbes
- S&P Global
- The Guardian
- Renewable Energy Magazine
- Context News
- Mining Weekly
- Euronews
- Wall Street Journal
- Carbon Pulse

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**S&P Global**  
Commodity Insights

# Introduction to the Africa Road Map

Fernando Coivas / Executive Director and Lead for Europe, CIS, and Africa NGL research  
18 June 2024

S&P Global Commodity Insights

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**S&P Global is working with the Cooking for Life Africa task force (CFLA) to develop a Road Map for LPG in Africa**

**What is the CFLA?**

- The CFLA is the principal vehicle through which the LPG industry will contribute to the International Energy Agency (IEA) Clean Cooking in Africa Summit and subsequent projects and initiatives, including COP29.
- The CFLA acts as any WLGA committee or working group under the authority and guidance of the WLGA Industry Council advising and supporting on strategic decisions, planning and related resources and budget implications.

**What is the Road Map?**

- The Task Force will be in charge of developing a Road Map for LPG in Africa, the cost of which will be borne by its members, including SPGCI.
- The Road Map will quantify the potential for LPG adoption and provide recommendations for regulators and non-governmental organizations (NGOs) to create an environment that unlocks that potential, specifically in Sub-Saharan Africa.

**What is S&P Global Commodity Insight's (SPGCI) role?**

- Gather feedback from WLGA members and partners.
- Analyze data and insights from our internal databases and existing publications (e.g. WLGA, IEA)
- Quantify LPG's growth potential and develop recommendations to achieve it.
- Develop a report for task force members and support external distribution.

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## Key elements of the Road Map

**Objectives**

- Announcement during the COP29 negotiations on 11-22 November 2024, and to further discussion at LPG Week on 18-22 November 2024.
- Prioritized markets that have the potential to make significant progress through 2030. Moreover, markets will be phased:
  - Low-Hanging Fruit: primed for growth.
  - Beginning the Transition: more assistance needed.
  - Below the Red Line: immediate growth is not realistic.
- The Road Map for 2024 will concentrate on the "Low-Hanging Fruit".
- The Road Map will focus on recommendations, not on market information.

**Approach**

- Leverage studies that have gathered market information (e.g. IEA's *A Vision for Clean Cooking Access for All, Africa Energy Outlook*) and that resides within SPGCI's knowledge base (e.g. market size, import/export infrastructure).
- Moderate conversations with WLGA members and partners.
- Prioritize markets (e.g. potential for success by 2030, WLGA members and government partnership).
- Develop recommendations, including potential pilot programs.
- Provide the elements for holding workshops with the governments of the countries of focus to present the findings and begin facilitating action on the recommendations.

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## Objectives and scope

Sample scope items

Draft for discussion

Problem statement	Market overview and outlook	Recommendations
<ul style="list-style-type: none"> <li>Energy balance</li> <li>Per capita consumption</li> <li>Societal costs</li> <li>Barriers to growth</li> </ul>	<ul style="list-style-type: none"> <li>Market prioritization and classification, based on similar conditions, challenges, and potential</li> <li>Market fundamentals and outlook</li> <li>Distribution market</li> <li>Available infrastructure</li> <li>Market structure</li> <li>Key regulatory characteristics</li> <li>Safety standards and other relevant technical elements</li> </ul>	<ul style="list-style-type: none"> <li>Case studies (e.g. North Africa, India, Bangladesh, Brazil, Indonesia)</li> <li>Market potential</li> <li>Socioeconomic benefits and investments required</li> <li>Potential pilot projects</li> <li>Competition between fuels and "how to close the gap"</li> <li>Asset requirements</li> <li>Enabling regulation and incentives</li> <li>Supply strategies</li> <li>Technology tools</li> <li>Potential to build supply chains</li> </ul>

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## Questions and discussion

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**RENEWABLE LIQUID GAS**  
Social Media Campaign Overview  
June 2024

www.worldliquidgas.org



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**CAMPAIGN OVERVIEW**

**Campaign objectives**

- ◆ Raise awareness and educate stakeholders about rLG solutions, and opportunities to support global energy transition.
- ◆ Amplify rLG facts, key messages and case studies to target audiences in selected markets.
- ◆ Influence public sentiment and perceptions about rLG, and its role as part of the energy mix.




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**CAMPAIGN OVERVIEW**

**Core campaign elements**

- ◆ Updated rLG Communications Toolkit, to be shared with WLGA members.
- ◆ Updated WLGA website page focused on [Renewable Liquid Gas](#).
- ◆ Video messages from selected markets, to be shared on social media.
- ◆ LinkedIn blog post sharing highlights from Liquid Gas Europe Congress (18-20 June).
- ◆ Social media paid promotion on LinkedIn and X, targeting relevant audiences in selected markets, running 24-28 June.



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**RENEWS BULLETIN – MAY 2024**



<https://online.flghtm5.com/vadde/xepj/#p=11>

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**CAMPAIGN KEY MESSAGES**

**Benefits of Renewable Liquid Gas**

- ◆ Transitioning to rLG is a seamless, inexpensive process.
- ◆ rLG is nearly identical in chemical structure to conventional LPG. It is also transported, stored, and used in mostly the same way.
- ◆ rLG has a vastly improved emissions profile when compared to fossil fuels like oil and coal.
- ◆ rLG is commercially viable and already available on the market.
- ◆ Low concentrations of air pollutants when burned, rLG can reduce emissions by 70-80% compared to heating oil.

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**CAMPAIGN KEY MESSAGES**

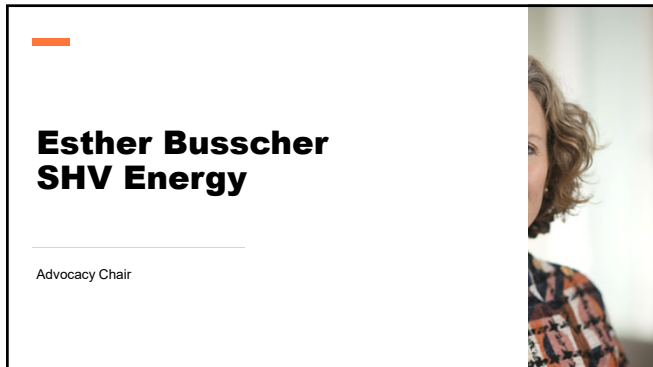
**Supporting the energy transition**

- ◆ rLG can support hard-to-abate industries which require gaseous fuel for high-temperature industrial processes.
- ◆ rLG emissions produced in domestic settings can be reduced further by using it in combination with special heating technologies, such as combined heat and power systems.
- ◆ A phased switch to rLG is possible. In most cases it can be blended with conventional LPG to enable a secure and gradual transition to 100% rLG usage.
- ◆ New methods of producing rLG efficiently and at scale are in the development pipeline and will soon be available on the market.

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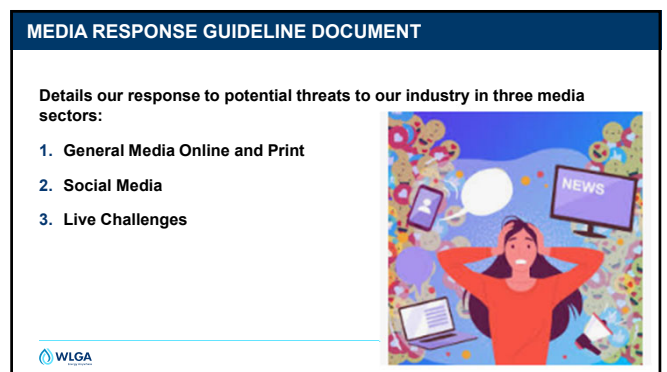
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### GENERAL MEDIA ONLINE AND PRINT – FOUR SCENARIOS

- Scenario 1: A negative article in a significant, respected, professional outlet attacking industry
- Scenario 2: An article in a significant, respected, professional media outlet which directly refers to WLGA (or a team member quote).
- Scenario 3: An article that mentions fellow organisations or associations, or discusses issues in a particular geography.
- Scenario 4: A positive article, recognising the benefits of Liquid Gas or the activities of WLGA.




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### GENERAL MEDIA ONLINE AND PRINT – SCENARIO 1

**A negative article in a significant, respected, professional media outlet where the product and the industry is attacked:**

- Swift response
- Analyse the article and prepare a data driven response
- Response decision between association lead and WLGA
- Identify and respond to the author
- Give a positive response to negative content
- Offer to engage in dialogue with the author
- Accept this may not always be possible



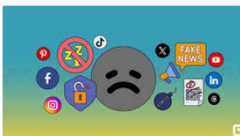
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### GENERAL MEDIA ONLINE AND PRINT – SCENARIO 2

**Scenario 2:** An article in a significant, respected media outlet which directly refers to WLGA (or a team member quote):

- Analyse the article and prepare a data driven response
- Identify and respond to the author
- Give a positive response to negative content
- Offer to engage in dialogue with the author
- Accept this may not always be possible



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### GENERAL MEDIA ONLINE AND PRINT – SCENARIOS 3 AND 4

**Scenario 3:** An article that mentions fellow organisations or associations, or discusses issues in a particular geography:

- Contact local association, understand their response, offer support in terms of data etc

**Scenario 4:** A positive article, recognising the benefits of Liquid Gas or the activities of WLGA:

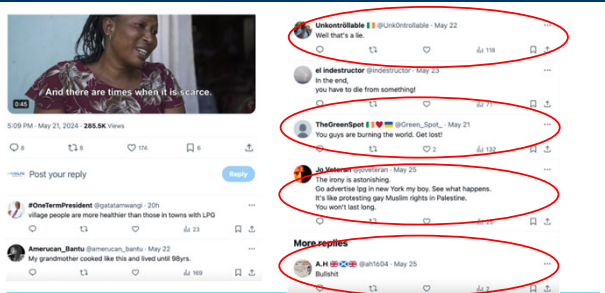
- Identify and respond to the author
- Give a positive response to reinforce their content
- Offer to engage in further dialogue with the author



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### SOCIAL MEDIA




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### SOCIAL MEDIA - X

- Ignore
- If a genuine challenge to the sector, take it off-line to respond.
- If feed is being swamped, pause a campaign.
- Reviewed by our public affairs consultant and Digital Manager for any decision to remove a Tweet or pause a campaign.



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## SOCIAL MEDIA - LINKEDIN

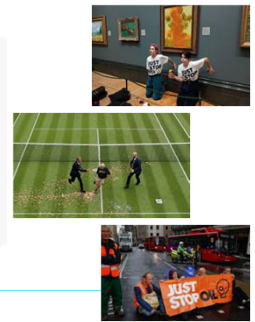
- A more focused 'business' presence
- A more professional and positive audience
- **Ignore** negative trolling
- **Acknowledge** positive reinforcement



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## LIVE CHALLENGES




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## LIVE CHALLENGES – LPG WEEK

### LPG Week

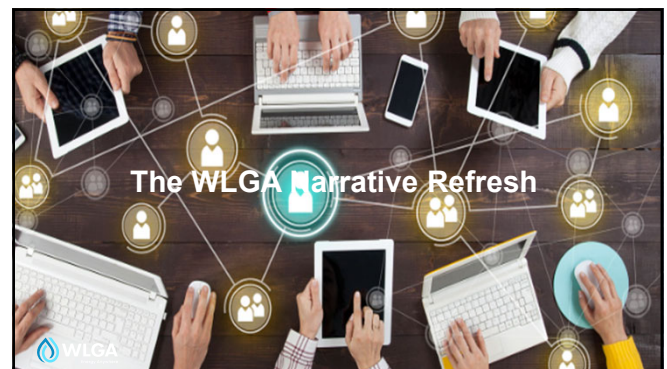
- Secretariat work with the local venue to ensure security is appropriate and in place.
- Include this into planning for regional summits.
- We have not yet encountered any such activity but as we increase awareness around our events we will be prepared.

### During Other Industry Events and External Events

- Responsibility of organisers to have a plan in place and for us to understand their plan.
- At external events such as COP, WEC, African Oil Week, etc. there will be plans. However, if WLGA is speaking at these events and is challenged then we have a response to this.


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## THREE PHASE REFRESH – PHASE I REVIEW

### Why?

- Tie in with rename
- Possible Low Motivation
- More Positive Brand Identity
- Disjointed Brand Elements

### Review

- Existing messaging and narrative framework
- Website and social media channels
- External review for up to 3 peers or competitors



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## THREE PHASE REFRESH – PHASE II & III BRAINSTORM & OUTPUT

### Phase II: Brainstorm & Collaboration

- Workshop with team

### Phase III: Narrative Output

- A three-second tagline
- A 30-second elevator pitch
- 1-2 page narrative (including up to four thematic pillars)
- Supporting 1-3 page Q&A document to respond to criticisms and challenges of LPG



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LPG WEEK 2024/CAPE TOWN

### SCHEDULE AT A GLANCE

**Updates**

- Conference brochure released
- Registration is open & plan your participation
- Commercialisation: exhibition only 30% remaining
- Plan your week now!

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LPG WEEK 2024/CAPE TOWN

**We need your support!**

**Sponsors to date** →

- Featured Sponsors:** ORX, Petrogaz, SHV ENERGY, Targa
- Collaborating Sponsors:** Ferrelgas, TARGA, ultragaz
- Contributing Sponsors:** AMRCLALIA, WORTHINGTON, OCEANON, OPIS
- Supporting Sponsors:** CPS, Dimeta, SAP Global Commodity Insights, Volone
- Autogas Day:** Westport Fuel Systems

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FROM LPG WEEK TO LIQUID GAS WEEK

Liquid Gas Week

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LIQUID GAS WEEK

The Global Liquid Gas Community in Action

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LIQUID GAS WEEK 2025/RIO

**Updates**

- Venue: ExpoMag
- Mark your calendar 20<sup>th</sup> - 26<sup>th</sup> September 2025
- Theme: *Delivering Energy for Life*
- Latin American Day/3-day exhibition
- 5 Featured sponsors already!

**LIQUID GAS WEEK**  
22-26 SEPTEMBER 2025 • RIO DE JANEIRO

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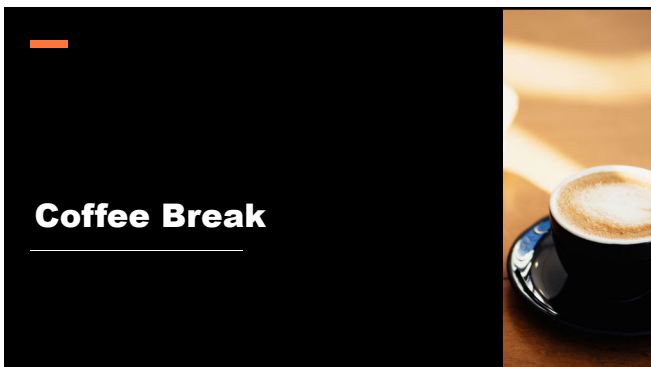


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**Cristián Aguirre Gasco Chile**

Communications Chair

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**Fabian Ziegler DCC Energy**

Sustainable Growth and Innovation Chair

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## AGENDA

- Introduction - SGI Chair Fabian Ziegler
- Update on Renewable activities
  - rLG 2024 Action Plan & Progress
  - rDME HSE Action Plan & Progress
- Outcomes from rLG Projections Study
- Decarbonisation Roadmap - Net Zero Roadmap
- Strategic Innovation Summit 2025
- Closing - SGI Chair Fabian Ziegler

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## GLOBAL TECHNOLOGY CONFERENCE GTC 2024

- GTC 2024 Cape Town, 19th November 2024, mark your calendars
- Call for abstracts opened: 2nd April 2024
- Submission of abstracts deadline: 28th July 2024
- Abstracts acceptance/rejection: 20th Sept. 2024




**More information and submission guidelines:**  
<https://www.lpgweek.com/global-technology-conference>

**All members to communicate the event in their networks and encourage submissions**




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## GLOBAL SCIENCE CONFERENCE GSC 2024

- GSC 2024 Cape Town, 22nd November 2024, mark your calendars
- Call for abstracts opened: 30th May 2024
- Submission of abstracts deadline: 28th July 2024
- Abstracts acceptance/rejection: 30th Aug. 2024




**More information and submission guidelines:**  
<https://www.lpgweek.com/global-science-conference-gsc2024>

**All members to communicate the event in their networks and encourage submissions**




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## UPDATE ON RENEWABLE ACTIVITIES (LPG AND DME)






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## RENEWABLES STEERING COMMITTEE MEETING – 13TH JUNE

<b>Steering Committee</b> <ul style="list-style-type: none"> <li>• DCC, Fabian Ziegler (Chair)</li> <li>• SHV Energy, <b>Esther Busscher*</b></li> <li>• UGI, <b>Markus Dreier</b></li> <li>• PERC, Tucker Perkins</li> <li>• Ultragaz, Aurelio Ferreira</li> <li>• IOC, Dr Srivastava / Dr. Kannan</li> <li>• Suburban Propane, Michael Stivala</li> <li>• Dimeta, Frankie Ugboma</li> <li>• Elgas-Linde, Gareth O'Brien</li> </ul>	<b>Agenda</b> <ul style="list-style-type: none"> <li>• Work Plan 2024 Progress Updates</li> <li>• Decarbonisation Roadmap - Net Zero Roadmap</li> <li>• Budget and Finances 2024</li> </ul>
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## THE RENEWABLES WORKING GROUP

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### RENEWABLES WG ACTIVITIES

<b>Study</b>	Renewable Liquid Gas Pathways & Projections Study	Bio-FCC to rLPG	Sustainability Certification Schemes for low carbon/renewable Liquid Gas	Net Zero Roadmap
<b>Group</b>	Work Stream 1 Pathways & Projections	Work Stream 1 Pathways & Projections	Work Stream 2 Carbon Credits & Certificates	WS with involvement of representatives from SGI & Adv. pillars
<b>Activities</b>	Workshop Stakeholder Interviews Discussions	Desk research Stakeholder Interviews	Scope of Work Partner Selection	Initial exchange of ideas Draft concept note
<b>Status</b>	Preliminary results are being discussed	Briefing note ready	Partner selected - ERM Project kicked-off	Steer Co discussion

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### RENEWABLE DME (RDME) INTEGRATION IN THE LPG INDUSTRY

#### SAFETY, TECHNICAL, OPERATIONAL AND ENVIRONMENTAL ASPECTS

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### 2024 PROGRESS - OVERVIEW

**Key Milestones**

- Discussed 12% blend LPG definition in RID/ADR March 2024, good support but decision referred to September, awaiting UN results in June (see below)
- Request for 12% Drop-in blend approval (Special Provisions for UN1075 and UN1965) submitted for June UN meeting
- Request for new UN number covering all DME/LPG blends submitted in March for UN meeting in June
- Intersessional on-line meetings organised in May by WLGA for all RID/ADR and UN national delegations (120 invited) to explain related work and support the submitted requests.
- UN (Special Provision) >ADR (Definition)> LPG Standards

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### PROJECT DASHBOARD

**Reminder:**

- RR actions drive activities
- Some testing requires follow-up
- Assessment of existing/legacy equipment now focus
- Higher risk of discovering issues
- Developing mitigations

Milestone	Status	Due Date
UN Special Provision - New UN Number	Submitted	September 2024
UN ADR Submission - EN1375 & EN1965 SP	Submitted	October 2024
EN1965 Submission	Submitted	September 2024
EN1075 Formal Submission	Submitted	March 2024
UN Formal Submission - EN1375 & EN1965 SP	Submitted	September 2024
EN1075	On Track	June 2024
EN1375	Awaiting update from TC	
EN1965	On Track	July 2024

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### 2024 PROGRESS - OVERVIEW

- All critical testing prior to UN/ADR submissions completed
- Some testing continues well – materials (metallics), odorant/water
- Significant delays to hose testing due to test-house availability
- Appliance testing ph1 – WS4 appointed new lead Adriana Zainea
- Significant technical findings in appliance assessments – requires review
- OEMs being engaged to participate in second phases
- Practical trials underway or planned in several locations
- Materials compatibility standardization progressing (Non-LPG standard)
- PAS6666 (leading to EN437 amendment, appliances) stalled
- Budget position healthy owing partially due to some delayed spend

UN Decision will drive

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### SGI 2 – RENEWABLE LIQUID GAS (LPG AND DME)

#### OUTCOMES (PRELIMINARY) FROM THE RLG PATHWAYS AND PROJECTIONS STUDY

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### RENEWABLE LIQUID GAS PATHWAYS & PROJECTIONS

Preliminary results (not intended for wider distribution)

Year	Scenario	LPG (MMt/yr)	DME (MMt/yr)	Total (MMt/yr)
2030	Baseline	1,500	200	1,700
	Moderate	2,500	300	2,800
	High	3,500	400	3,900
2040	Baseline	3,500	400	3,900
	Moderate	5,500	600	6,100
	High	7,500	800	8,300
2050	Baseline	5,500	600	6,100
	Moderate	10,000	1,000	11,000
	High	15,000	1,400	16,400

- Projection timelines:** 2030, 2040 and 2050 with three scenarios: Baseline, Moderate and High
- Geographical scope:** Global outlook with regional views on Asia, Europe, Africa, North America & South America
- Best Case Scenario:** By 2050 total renewable Liquid Gas is ~ 50 million tonnes (median value) ie much lower than 50% of the global non-chemical LPG demand
- Uncertainty:** The range is big, the model estimates that with 95% confidence the volumes of renewable liquid gas would range between 30 – 75 million tonnes.

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### WAY FORWARD

- Additional requests**
  - Investigate potential supply projection beyond 2050
  - Estimate total sustainable potential (irrespective of timelines)
  - Analysis of Oceania (impacting projections for Asia)
  - Reflect DME volumes, also in LPG equivalent
- Next Steps**
  - Integrate additional requests
  - Fine tune model
  - Report compilation

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### DECARBONIZATION ROAD MAP OR NET ZERO ROADMAP

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### BACKGROUND & OBJECTIVE

- Background** (pre-read memo provided)
- Project Objective:**
  - Identify and understand key ingredients that are critical for developing a Decarbonisation/ Net Zero Roadmap for the LPG sector
  - Visualize possible roles of LPG in a future no / low carbon energy system
  - Create a generic industry Decarbonisation framework that can be adjusted to geographies in line with their Decarbonisation urgency
  - Learn as an industry and align on the storyline

**\*\*Use 80-20 rule to quickly develop an initial concept which can be refined later**

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### INITIAL CONCEPTUALISATION

- Develop GHG emissions baseline** for LPG industry using emission factors and LPG consumption statistics (estimation of current sectoral and geographical carbon (CO2) footprints)
- Breakdown LPG life cycle emissions** into different value chain phases/stages: production, transport, distribution, use (and assign default CIs)
- List key carbon reduction levers** explaining their strategic roles, examples: (i) Renewable Liquid Gas, (ii) CCSU, (iii) Carbon offsets, (iv) Energy efficiency, (v) Other sustainable fuels (HVO diesel), renewable electricity, etc.
- Quantify the carbon reduction levers** to 2050, to add credibility
- Collect scenarios of Net-Zero goals** from countries and companies
- Get support from external advisor** John MacArthur who is moderating discussions and helping us write sections of the story particularly on CCSU and Nature-Based Solutions (carbon offsets)

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### DISCUSSION RESULTS & NEXT STEPS

- There is a strong need for a Net Zero Roadmap** for the LPG industry, as agreed by the renewables Steering Committee
- The work scope extends beyond renewables WG** as it would include discussion on solutions other than renewable molecules to get to Net Zero
- Way forward:** To set up a separate Work Stream with representation from SGI & Advocacy pillars
- Starting point:** To write a white paper outlining the strategic role of major carbon reduction levers (with a degree of quantification possible) available to the LPG industry
- A phased approach recommended** to be efficient in producing the deliverable. It will also help in identifying areas where further deep-dive would be necessary

**IC members are requested to nominate workstream participants from interested and competent parties**

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**STRATEGIC INNOVATION SUMMIT 2025**



WLGA Strategic Innovation Summit  
**January 2025**  
 Paris, France

Mark Your Calendars!

**SGI 1.1 Innovation for Growth Summit**

- The 2025 WLGA Strategic Innovation Summit will be held in Paris, France.
- Coordinating with stakeholders to select an event site
- Targeting a week in January, coordinating with industry partners to identify the best event dates

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**CONCLUSIONS**


**FINAL REMARKS**

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**Fabian Ziegler**  
**DCC Energy**


Sustainable Growth and Innovation Chair



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**Blaise Edja**  
**Oryx Energies**

Safety and Business Improvement Chair



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**SUPPORTING SAFE, EFFICIENT AND RESPONSIBLE BUSINESS**

BRIEFING NOTE – SAFETY INCIDENTS AND BENCHMARKING

GOOD INDUSTRY PRACTICES – MANAGING CYLINDERS

UPDATES FROM THE YOUTH COUNCIL



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**SUPPORTING SAFE, EFFICIENT AND RESPONSIBLE BUSINESS**

**BRIEFING NOTE – SAFETY INCIDENTS AND BENCHMARKING**

- SAFETY CORE GROUP MEETS TWICE A MONTH (2<sup>ND</sup> TUESDAY)
- REGULARLY REPORT ON PUBLISHED INCIDENTS
- DISCUSS MITIGATING MEASURES AND PRODUCE SAFETY ALERTS
- SEEKING INTERNAL INFORMATION ON MEMBER SAFETY INCIDENTS & NEAR MISSES
- PROPOSAL TO ISSUE SURVEY AND COLLECT, AND SHARE, DATA (ANONYMOUSLY)
- OISD ALREADY PUBLISHES SAFETY DATA ([OISD Case Studies - Oil Industry Safety Directorate \(OISD\)](#))
- ARE YOU REPRESENTED ON THE WLGA SAFETY GROUP?


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### GOOD INDUSTRY PRACTICES – MANAGING CYLINDERS

#### GUIDE FOR CYLINDER OWNERSHIP, MAINTENANCE & FILLING

- SEVERAL WLGA REPORTS ON CYLINDERS ALREADY PUBLISHED
  - GUIDE TO CYLINDER MANAGEMENT (2013)
  - DEVELOPMENT OF SUSTAINABLE LPG MARKETS (2014)
  - REQUALIFICATION OF CYLINDERS (2015)
  - GUIDE TO CYLINDER FILLING (2017)
  - CYLINDERS IN THE DISTRIBUTION CHANNEL (2019)
  - LINK TO REPORTS: [Simply Safety - World Liquid Gas \(WLGA\)](#)
  - SO WHY ANOTHER?




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### GOOD INDUSTRY PRACTICES – MANAGING CYLINDERS

#### GUIDE FOR CYLINDER OWNERSHIP, MAINTENANCE & FILLING

- ESTIMATED 2BN CYLINDERS IN CIRCULATION GLOBALLY (\$50+BN) AND GROWING...
- LPG IS UNIQUE - PACKAGING MORE EXPENSIVE THAN THE CONTENTS
- CYLINDER OWNERSHIP MODELS VARY – CUSTOMER OWNED > COMPANY OWNED > MIXED
- CONCERN OVER PARTIAL FILLING OPERATIONS
- WORKING GROUP ESTABLISHED AND SCOPE AGREED
- FOCUS ON THE SUSTAINABILITY OF CYLINDERS
  - THE IMPORTANCE OF CYLINDER MANAGEMENT TO PROTECT THE ASSETS
  - ENDORISING COMPANY OWNED MODEL
  - NEED FOR SOUND POLICY TO ENCOURAGE LONGEVITY AND INVESTMENT




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### GOOD INDUSTRY PRACTICES – MANAGING CYLINDERS

#### GUIDE FOR CYLINDER OWNERSHIP, MAINTENANCE & FILLING

- GATHERING CYLINDER DATA FROM COUNTRIES
- ORIGINALLY 15 COUNTRIES
- ADDING:
  - HONG KONG
  - PAKISTAN
  - NEW ZEALAND
  - KENYA
  - ADD OTHER COUNTRIES??



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### THE WLGA YOUTH COUNCIL



WLGA Youth Council

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### THE YOUTH COUNCIL LEADERSHIP

#### Two Elected Co-Chairs

- Divya Mani, Indian Oil Corporation, India
- Manikandan Muralidharan, Hindustan Petroleum, India



Guided by a Steering Committee comprising representatives from the following IC member companies:



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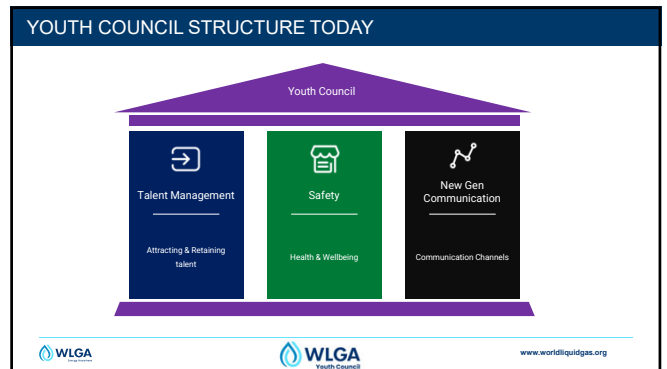
### THE YOUTH COUNCIL LEADERSHIP

**EXECUTIVE COUNCIL – Co-Captains of the THREE PILLARS**

<p><b>Talent Management</b></p> <ul style="list-style-type: none"> <li>Pedro Guimaraes, SHV Energy</li> <li>Jeffrey Miller, Ferrellgas</li> </ul>	<p><b>Safety</b></p> <ul style="list-style-type: none"> <li>Alejandro Aguirre, Abastile</li> <li>Mehdi Akhannouch, Afriquiagaz</li> </ul>	<p><b>New Gen Communication</b></p> <ul style="list-style-type: none"> <li>Cole Smith, Suburban Propane</li> <li>William Pulivarthi, Indian Oil Corporation</li> </ul>
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Guided by a Steering Committee comprising representatives from the following IC member companies:

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### YOUTH COUNCIL STRUCTURE TODAY

• Young Men	23
• Young Women	22
• Total Representatives	47
• Total Industry Council Companies Represented	28

Logos for WLGA and the website www.worldliquidgas.org are shown at the bottom.

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### THE YOUTH COUNCIL RESTRUCTURE

**Three Pillars of Activity**

- Talent Management**
  - How to attract young talent to the industry. Analysis of perceptions of pros and cons of working in the industry, awareness of careers in the industry.
- Safety (Health and Well-Being)**
  - Support the WLGA Safety Group, showcase learnings from across the world, propose initiatives to ensure customer related safety and well-being by promoting LPG as an eco-friendly fuel.
- New Gen Communication**
  - Use new gen mass communication techniques through social media tools to promote liquid gas, its applications. Advocate for Liquid Gas as a fuel to facilitate and guide new customers and unleash the potential of Liquid Gas.

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### SAFETY PILLAR

**Focus on Improving Safety in three areas:**

- Filling Plant
- Distribution Channel
- Customer

**Activities and outcomes**

- Book of One-Page of best Practices
- How to use the IA technology

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**Blaise Edja**  
**Oryx Energies**

Safety and Business Improvement Chair

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