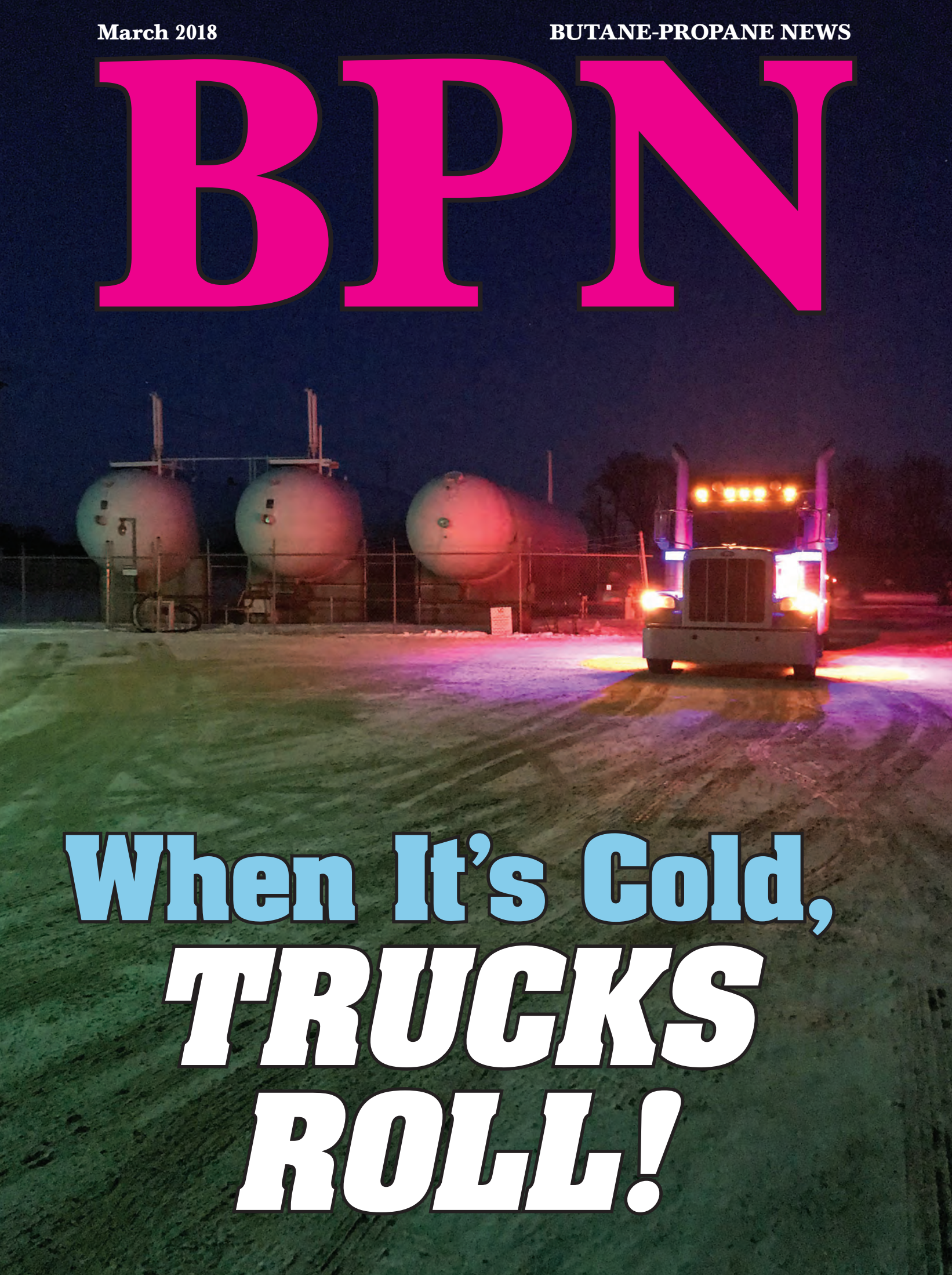
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Vol. 50 No. 3

BPN
BUTANE-PROPANE NEWS

March 2018

Beyond the Mains

By Natalie Peal

Trifecta

In February, the propane industry scored a trifecta in Santa Barbara, Calif. as the National Propane Gas Association (NPGA), Propane Education & Research Council (PERC), and the World LPG Association (WLPGA) held meetings under one roof. This was the first time that the three major groups combined dates and locations.

The gathering was a perfect setting for PERC president and CEO Tucker Perkins to introduce the council's new focus, and its Three-Year IT Plan, which includes maintaining stability of the current environment and planning for transformation (year one); transforming the environment (year two); and aligning business processes (year three).

Perkins began his remarks by underscoring the pillars of which the council must always remain cognizant. They are: PERC serves the propane marketer; PERC spends other people's money; and PERC can't do it alone. This new emphasis underscores a change in direction for the council, and is likely one that resulted from the time Perkins spent listening to industry members' opinions of how to make PERC work better for them.

The shared responsibility of the three organizations to better the industry melded in a number of the presentations. The mutual campaign to squelch the "Electrification of Everything" is being felt worldwide. James Rockall, CEO and managing director of WLPGA, discussed this challenge, and told the audience at the PERC meeting that in this case, "natural gas is our ally." He also highlighted how the world association is encouraging developing countries to subsidize the implementation of propane for cooking to replace the dirtier fuels that cause premature deaths and respiratory illnesses.

This subject was reviewed earlier during the WLPGA meeting, as

(Continued on p. 39)



24

As Temps Tumble, Demand for High-Value Trucks Soars.

The warm winters over the past two years have forced many marketers to rethink their truck buying plans. However, the frigid temperatures bearing down on large swaths of the country have put many back into the market. Truck builders are once again welcoming customers who, thanks to the weather or recent tax cuts, are ready to sign on the dotted line.



31

Moving the Mail—Trucks Roll with Winter Cold.

Etchberger Trucking and C Three Logistics are relatively new common carrier operations, but are well-acquainted with the propane industry. They are among the unsung heroes this winter as their rigs have delivered propane to marketers to ensure they were able to keep their customers' tanks full and homes warm and cozy.



33

Andy Ronald Retires, Leaves Legacy of Win-Win Solutions.

Throughout his 48 years in the energy industry, Andy Ronald developed a pattern of mobilizing diverse people to achieve win-win solutions in business, as well as in philanthropy. ***BPN*** recently discussed with Ronald his career accomplishments and the projects near and dear to him.

36

Cold Winter, New Strategic Plan: Hot Topics in Warm Santa Barbara.

Propane industry members were eager to discuss the cold winter, current and ensuing supply situations, and plot the future direction of the industry during the National Propane Gas Association's recent board of directors meeting in California. The association's Strategic Plan 2018-2020 was at the forefront of many conversations.

About the Cover: Photo by Kris Etchberger, Etchberger Trucking Inc.

Departments

3 Beyond the Mains
6 LPG Marketplace
8 LPG Worldwide
10 Propane and the Law
12 Newsfronts
43 Shopper's Mart
43 People
44 Calendar
46 Classified Advertising
53 Advertisers Index

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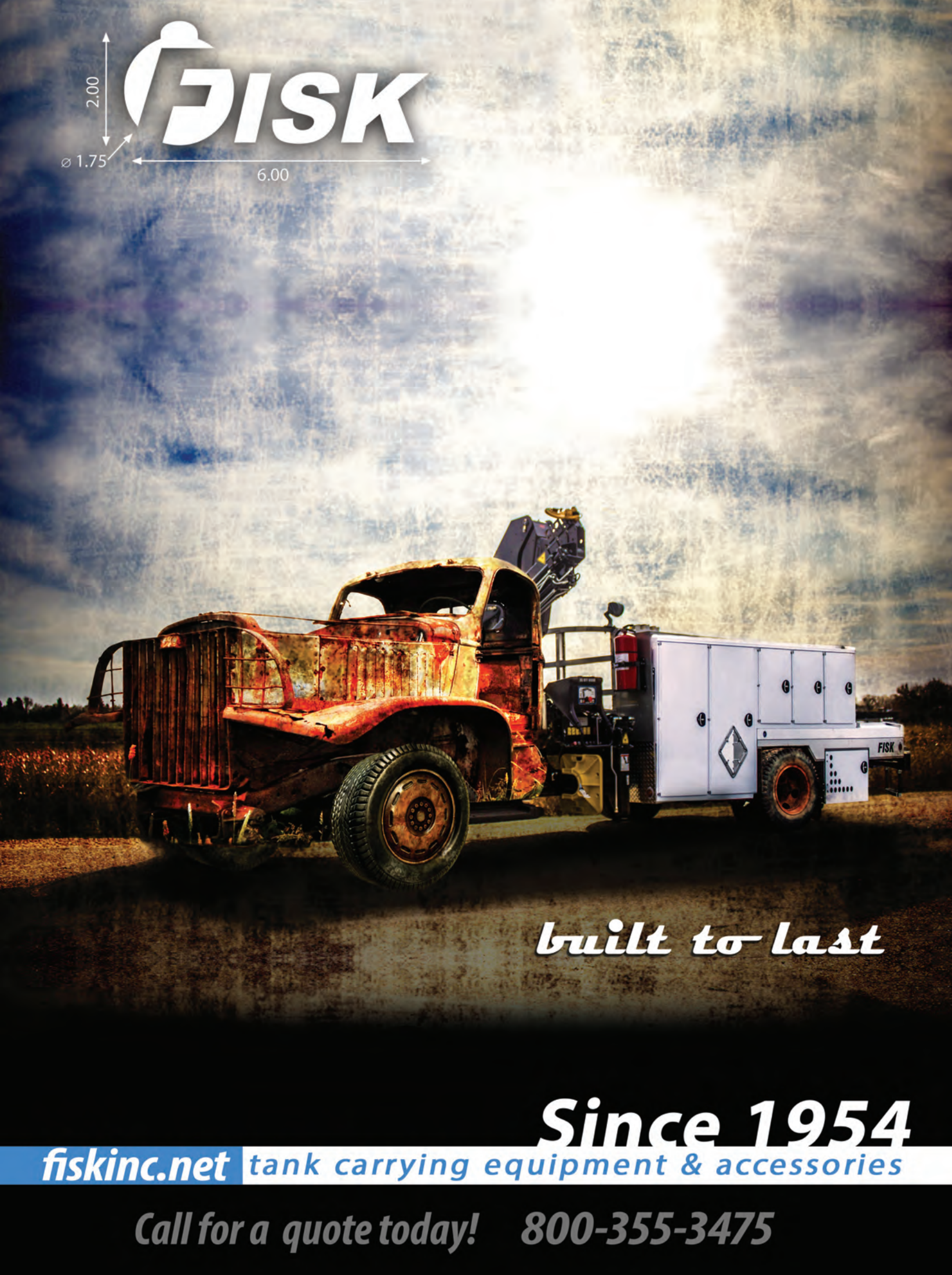
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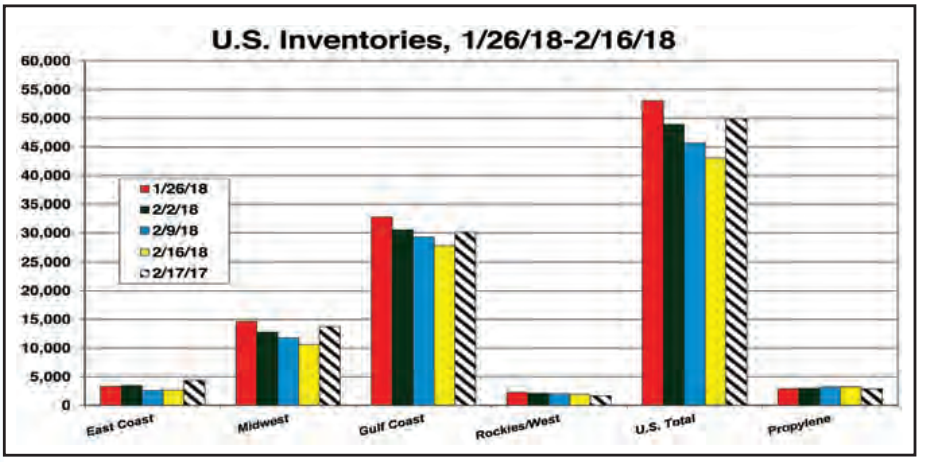

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Curious Winter Prices

MID-WEEK AVERAGE POSTED/SPOT PROPANE PRICES

(Cents per Gallon)

Date	Mont Belvieu		Group 140	
	POSTED	SPOT	POSTED	SPOT
1-18-18	109.168	93.375-93.875	97.700	89.875-90.25
1-25-18	104.105	84.25-85.50	89.150	80.625-81.50
2-1-18	102.793	88.50-89.25	86.50	81.125-82.00
2-8-18	96.043	77.125-77.50	75.55	66.50-67.00
2-15-18	104.668	84.50-89.00	81.150	69.50-72.25



CANADIAN INVENTORIES

February 1, 2018)
Thousand Cubic Meters

Region	2-18	1-18	Change	2-17
PROPANE				
Propane—East	182.4	425.8	–57.2%	333.4
Propane—West	442.0	676.8	–34.7%	355.5
Total Propane	**624.4**	**1102.7**	**–43.4%**	**688.9**
BUTANE				
Butane—East	167.5	245.2	–77.7%	165.1
Butane—West	320.5	334.7	–4.2%	278.2
Total Butane	**488.0**	**579.9**	**–15.8%**	**433.3**

Source: National Energy Board

U.S. RESIDENTIAL PROPANE PRICES

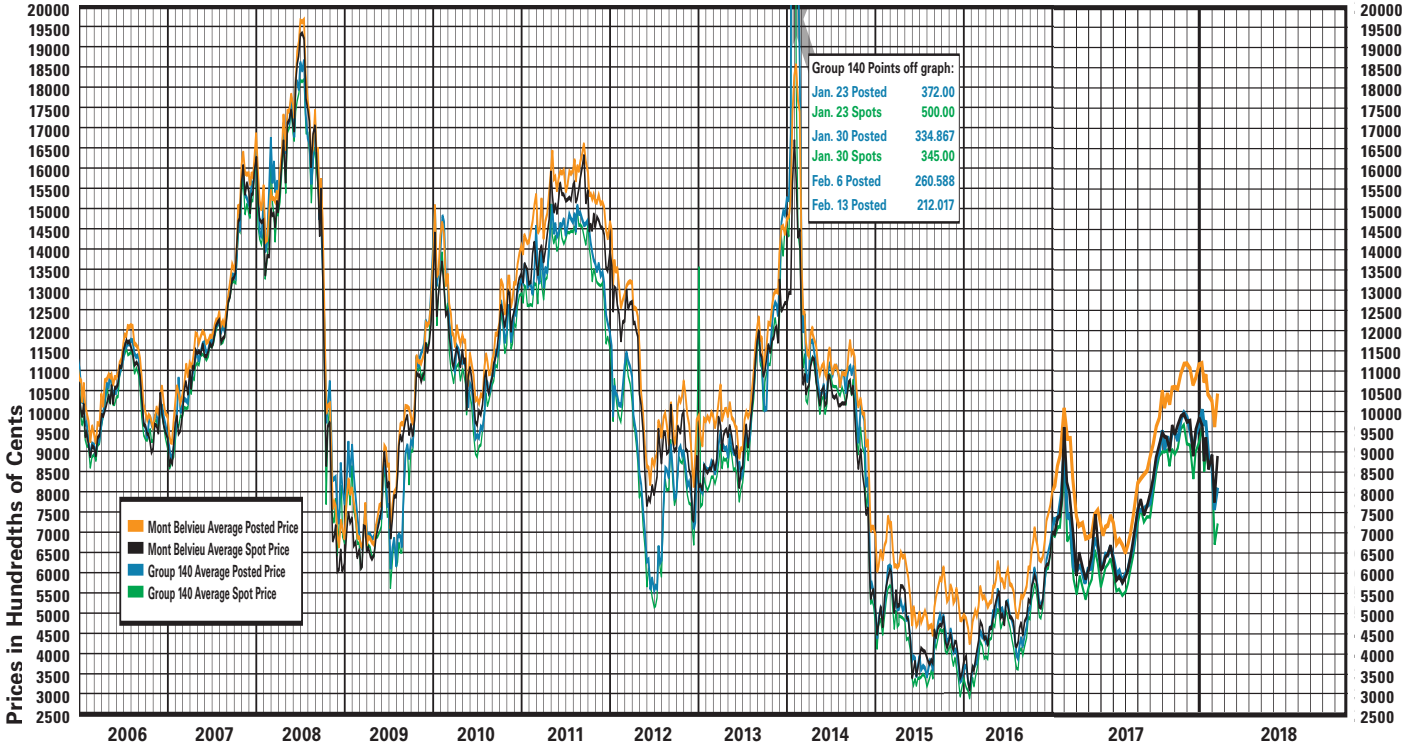
(Mid-Month, Cents per Gallon)

Region	Date		
	2-18	1-18	2-17
East Coast (PADD I)	333.0	334.8	320.2
Midwest (PADD II)	201.6	201.5	188.0
Average U.S.	275.5	258.4	245.1

Source: "This Week in Petroleum," Energy Information Administration

Mont Belvieu's posted price lost more than 6 cents the latter half of January to land at 102.793 cent/gal. The next weeks' prices dove to 96.043 cents, and settled at 104.668 cents mid-month. The Group had larger bounces, falling more than 11 cents to start February at 86.50 cents. Another loss loomed as the price slipped to 75.55 cents, then rebounded to end at 81.150 cents.

Spots at Belvieu fell from 93.375-93.875 cents to 84.25-85.50 cents, and back to 88.50-89.25 cents early February. To end the period, they fell to 77.125-77.50 cents then rose to 84.50-89.00 cents. The Group fell from 89.875-90.25 cents to 81.125-82.22 cents to begin February. The next week they sank to 66.50-67.00 cents, but rose slightly to 69.50-72.25 cents to finish mid-February. ■



MONT BELVIEU & GROUP 140 AVERAGE THURSDAY PROPANE PRICES

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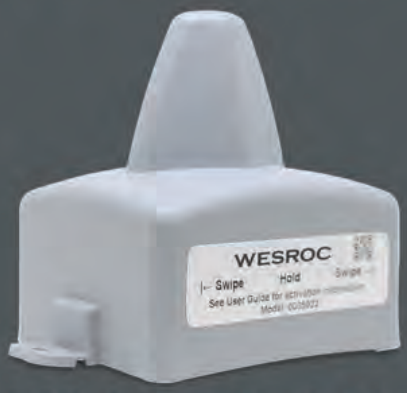
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WORLD PRICES AND FREIGHT RATES

February 15, 2018

DELIVERED (CIF)

TERMINAL	PROPANE	BUTANE
Rotterdam	$432	$409
Mediterranean	$452	$477
Japan (Contract)	$487.5	$476.5
China (Contract)		
South China	$476.5	$470.5
Taiwan	$482.5	$471.5

PRODUCERS (FOB) CONTRACT PRICES

TERMINAL	PROPANE	BUTANE
Saudi Arabia	$525	$505
Abu Dhabi	$525	$505
Kuwait	$525	$505
Qatar	$525	$505
Algeria		
Bethouia	$475	$485
Skikda	$475	
North Sea (avg.)	$470	$474.5
Naphtha (cif) Rotterdam (2/15/18)	$534.75	

FREIGHT RATES

Arabian Gulf	
Far East	$27-29
Mediterranean	$29-31
NW Europe	$49-51 (via Suez)
U.S. Gulf	$50-52 (Suez out/Cape back)
Brazil	$51-53 (Cape both ways)
Algeria	
NW Europe	$31-33
Japan	$49-51
U.S. Gulf	$29-31
U.S. E. Coast	$32-34
Brazil	$31-33
Australia	
Japan	$49-51
Northwest Europe	
Japan	$53-55

All prices and freight rates listed above are based on metric tons and are quoted in U.S. dollars, except for Mont Belvieu prices, which are in cents per gallon. The prices fob Middle East terminals are official government established prices and do not include premiums or discounts for spot transactions.

fob: free on board

cif: cost, insurance, freight



Although It's Winter, Propane Prices Are Falling

Higher oil prices and massive production boosted British Petroleum's annual profits to $6.2 billion (£4.4 billion) for 2017. Seven major projects, including those in Egypt, Azerbaijan, and the North Sea, pushed oil and gas production to 3.6 MMbbld, the highest since 2010.

BP follows U.K. rival Shell in seeing a boom from higher oil prices, which increased from less than $30 (U.S.) a barrel in January 2016 to more than $60/bbl at the end of 2017. The oil major is hoping to make a profit of $50/bbl. However, both Shell and BP have disappointed investors on cash flow, falling short of market expectations.

In Northwest Europe in mid-February, the large propane and butane markets had been well covered and were not missing tonnes. Several vessels were seen waiting a few days before discharging. Propane prices for large, fully refrigerated cargoes stood at $432 per tonne cif Amsterdam/Rotterdam/Antwerp (ARA), having softened by $94 per tonne since the end of January. Butane prices for large, fully refrigerated cargoes were at $409 per ton cif ARA, having weakened by $76.

The butane coaster market was still attracting some prompt demand, with petchems buying decent volumes.

The latest indication of propane swap deals are March $428-$432 per tonne cif Northwest Europe, and April $415-$419 per tonne cif Northwest Europe.

North Sea prices for March were at $470 per tonne fob North Sea terminals for propane and at $474.50 per tonne for butane. Propane had weakened by $67 per tonne and butane by $18 per tonne.

In the Mediterranean, there was additional demand for both propane and butane as the region was still in full winter. Prices for large, fully refrigerated cargoes of propane were $452 per tonne cif Lavera, South of France, and $477 per tonne for butane. Propane was off $99 per tonne and butane by $102 per tonne.

Sonatrach of Algeria set contract prices for February at $475 per tonne fob Skikda and Bethouia for propane and $485 per tonne for butane. Propane dropped by $75 per tonne and butane $45 per tonne since the end of January.

Saudi Aramco fixed LPG contract prices for February at $525 per tonne fob Middle Eastern (M.E.) terminals for propane and $505 per tonne fob M.E. terminals for butane. Both products had softened by $65 per tonne.

In the Far East, Japan- and Korea-based importers remained the major market drivers.

Examples of large LPG shipping fixtures include the 78,000 cu meter capacity *Everrich*, which was chartered by I.O.C. (Indian Oil Corp.; New Delhi) to load 44,000 tonnes of LPG from Iran for delivery options East. The *BW Libra 005*, 84,000 cu meter capacity, was taken by Vitol (Rotterdam) to load 44,000 tonnes of LPG from Houston for delivery options East. The *Pointis*, 84,000 cu meter capacity, was chartered by Glencore (London) to load 44,000 tonnes of LPG from Houston for delivery options East. The VLGC market, following a burst of activity in the western market, remained busy.

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Mississippi Court Dismisses Pipeline Explosion Claim

By David R. Schlee

The Court of Appeals of Mississippi recently affirmed the dismissal of a property damage lawsuit filed by a property owner, alleging losses arising from a propane explosion that occurred after a pipeline rupture. Among other things, the court reaffirmed the principle that the transportation of propane is not an "ultra-hazardous activity," subjecting transporters to strict no-fault liability for damages arising from a propane release. The case is *Elmore v. Dixie Pipeline Company*.

Pipeline Explosion

Edith Davis Elmore owned a house near Carmichael, Miss. Approximately a mile away was a section of the Dixie Pipeline. This 1100-mile pipeline, which was constructed in 1961, carries liquid propane. On Nov. 1, 2007, the pipeline ruptured about a mile from Elmore's house. There was a large release of propane, which ignited and exploded. Ms. Elmore claimed that her house sustained structural damage as a result of the shockwaves from the explosion.

The section of pipeline near Elmore's house was a 12-in.-dia. steel pipe manufactured by Lone Star Steel Co. A process known as low-frequency electric resistance welding (ERW) was used to manufacture the pipe. In the late 1980s, the U.S. Department of Transportation issued alert notices to pipeline operators whose pipelines contained ERW pipe manufactured before 1970. These notices advised of operational failures of pre-1970 ERW pipe. The notices made recommendations, but did not suggest that pipeline operators cease operating such pipelines, or that they remove and replace existing pre-1970 ERW pipe.

NTSB Report

The National Transportation Safety Board (NTSB) investigated the explosion. Its report indicated that the section of pipeline in question had been hydrostatically tested when it was installed in 1961, and again in 1984. In-line inspections were performed in 1998, 2005, and 2006. Accordingly, the NTSB concluded that no defects or anomalies in the pipe could be correlated to the 2007 incident. It concluded that the failure of a longitudinal seam weld and a portion of the upstream girth weld were the probable cause of the incident. It excluded factors such as corrosion, excavation damage, controller actions, or the operating pressure or conditions of the pipe.

In support of her claim against Dixie Pipeline, Elmore offered the testimony of a metallurgist regarding the proper standard of care for pipeline operators. In support of her negligence claim, he concluded that Dixie had violated that standard of care. The trial court issued an order excluding the metallurgist's testimony, and then dismissed Elmore's negligence claim because she had presented no evidence that Dixie Pipeline had violated the standard of care for pipeline operators. In addition, the trial court granted summary judgment in favor of Dixie on Elmore's claim for strict liability based on the doctrine of "ultra-hazardous activity." Elmore appealed.

Addressing the exclusion of the metallurgist's testimony, the appellate court noted that the Dixie Pipeline became subject to federal safety pipeline regulations in 1969. It further noted the metallurgist's admission that "he had no familiarity with the federal regulations that govern integrity management for the pipeline," and that "he did not apply or consider those applicable federal regulations and standards in rendering his opinion."

It further noted that the standards of the American Petroleum Institute, upon which the metallurgist did rely, were not relevant to the standard of conduct for pipeline operators. The appellate court agreed that "the relevant issue is whether Dixie was operating the pipeline in accordance with regulatory guidelines, and [the metallurgist] has not expressed any opinion about that." Based on the exclusion of the testimony of Elmore's expert, the appellate court affirmed the dismissal of her negligence claim.

Ultra-Hazardous Activity

The Court of Appeals then turned its attention to the strict liability claim based on the doctrine of ultra-hazardous activity. Under this doctrine, there can be strict liability, without a finding of fault, for losses arising from certain activities. The generally recognized requirements for such activities are that they must pose a high degree of risk that cannot be eliminated by the exercise of reasonable care; that there is a likelihood that harm resulting from such activities will be great; that the activity is not a matter of common usage; that it is carried on in an inappropriate place; and that its value to the community is outweighed by its dangerous attributes.

Courts across the country have generally limited the application of this doctrine to the use of explosives, such as dynamite, in blasting operations. It has never been extended to the distribution of propane and natural gas. However, Mississippi courts had not ruled on the issue,

(Continued on p. 22)



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Honeywell Providing Fractionation Plant to MarkWest Energy Partners

Honeywell (Des Plaines, Ill.) said Feb. 12 its UOP Russell business will provide a fractionation plant capable of producing 60,000 bbld of NGLs to MarkWest Energy Partners (Denver). The company, a wholly owned subsidiary of MPLX LP, will install the plant at its Hopedale facility in Jewett, Ohio. The system will recover propane, normal butane, isobutane, and natural gasoline from mixed natural gas liquids.

''A growing number of gas processors are investing in NGL fractionation technology,'' said Craig Ranta, Honeywell's business director for UOP Russell. ''Today, our fractionation technologies produce more than 850,000 bbld of natural gas liquids extracted from natural gas streams.''

The UOP Russell fractionation plant, customized for the large-capacity requirements of MarkWest, represents an expansion of UOP's portfolio of fractionation products. ''In less than 40 weeks, Honeywell can now provide fractionation units for de-ethanizers up to 125,000 bbld and for depropanizers up to 60,000 bbld,'' Ranta said.

MPLX is engaged in the gathering, processing, and transportation of natural gas; the gathering, transportation, fractionation, storage, and marketing of NGLs; and the transportation, storage, and distribution of crude oil and refined petroleum products. MarkWest operates natural gas gathering systems in six states. Its natural gas processing complexes remove heavier and valuable hydrocarbon components from natural gas. It operates natural gas processing complexes in the Marcellus and Utica shales, the Appalachia region, and in the Southwest. MarkWest's assets include about 5.9 Bcfd of gathering capacity, 8 Bcfd of processing capacity, and 610,000 bbld of fractionation capacity.

MFA Oil Acquires Kansas, Missouri Propane Companies

MFA Oil Co. (Columbia, Mo.) has acquired the propane and refined fuel operations of independent retailer Cardie Oil Inc. of Tampa, Kan., and full ownership of Callaway Propane LLC of Fulton, Mo. Cardie Oil, founded in 1939, will retain its tire business and a vehicle service garage in Marion, Kan. Callaway Propane was formed in 1998 as a partnership between MFA Oil and Callaway Electric Cooperative. Its Fulton location will remain open and be rebranded as MFA Oil.

Jon Ihler, MFA vice president of sales and marketing, commented on the acquisition of Cardie Oil, saying, ''This addition broadens our marketing territory, moving us further west in Kansas and complements our existing operations within the state. As we grow our customer base in Kansas we remain focused on delivering the same level of excellent service and support that customers have grown accustomed to from Cardie Oil.''

Cardie Oil president Craig Settle commented, ''MFA Oil has the resources and technology to help us offer even better customer service and improve our operations.''

Ihler added that the decision to acquire Callaway Propane enables each company to ''focus on its core strengths moving forward. Taking full ownership of Callaway Propane allows us to fully implement some system-wide technology and efficiency upgrades that should greatly enhance propane services for our customers.''

Raines Oil Co., an independent refined fuel retailer in Senath, Mo., was also recently purchased by MFA Oil. Raines Oil has been a fuel provider for farmers, cotton gins, and local civic organizations since 1972. ''Raines Oil Co. fits well with our existing operations in the Missouri Bootheel region, and this acquisition will help bolster our fuel storage in the area,'' Ihler said.

TCEQ Introduces Funding Opportunity for Propane Buses

The Texas Commission on Environmental Quality (TCEQ) has launched a $6.2-million funding opportunity under its expanded Clean School Bus Program. The program, which is now open, will provide grants to public and charter schools, as well as school transportation companies statewide, to install exhaust retrofits and replace older diesel buses with new school buses. One of the options available is replacement of older buses with cleaner-burning propane autogas buses.

The Propane Council of Texas (ProCOT) is lauding the funding opportunity and its aim of putting cleaner school buses on Texas roads. According to the Environmental Protection Agency, diesel exhaust is exceptionally harmful to children. In addition, older diesel buses produce higher amounts of nitrogen oxides (NO_x), greenhouse gases that contribute to smog, ground-level ozone, and are associated with adverse health effects. Cleaner-burning propane school buses are available from top manufacturers.

''Texas is home to over 26,000 pre-2007 diesel school buses,'' said ProCOT executive director Bill Van Hoy. ''If school districts would replace all the pre-2007 school buses, Texas could reduce NO_x by 7.5 million pounds a year.'' School districts can replace 2006 and older school buses with a propane school bus and receive between $36,500 and $52,500, depending on the passenger capacity. Funding is on a first-come, first-served basis with a limit of five buses per district.

The Clean School Bus grant guidelines and the application form can be found on the TCEQ website at *terpgrants.org*. School districts interested in switching to propane-powered buses can contract the Propane Council of Texas for information at *info@propanecounciloftexas.org or* by calling (800) 325-7427.

Texas Alliance Firms Position On Proposed NAFTA Changes

As the process for reworking the North American Free Trade Agreement (NAFTA) continues, the Texas Alliance of Energy Producers' board of directors has cemented the asso-

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ciation's position on NAFTA after President Trump remarked at the World Economic Forum in Switzerland that he may terminate the agreement and begin negotiations anew.

''NAFTA was born on Jan. 1, 1989, and has become a part of our daily oil business lives,'' said Texas Alliance of Energy Producers' chairman Bob Osborne. ''NAFTA is important to Texas, and if renegotiated, its impact on our markets for oil and gas needs to remain positive and profitable.''

''The heavier grades of crude oil imported to the U.S. from Canada are a necessary part of the U.S. oil supply mix,'' added Alliance president John Tintera. ''Many U.S. refineries were built to handle those grades and require heavy crude to make several vital consumer products.''

In anticipation of possible changes to the trade agreement, Alliance staff and consultants analyzed NAFTA's influence on Texas independent oil and gas production, with the group's petroleum economist, Karr Ingham, citing several key figures in his report: natural gas exports to Mexico have increased more than five-fold, or by 445%, since 2010, including an estimated 30% in 2017 alone; the U.S. became a net exporter of natural gas in North America by year-end 2017 due in large part to rapidly expanding natural gas exports to Mexico.

Further, exports of crude oil to Mexico have increased by 320% since 2010; exports from Texas account for 16% of all U.S. exports; and shipments to Mexico and Canada account for nearly 50% of Texas exports. Therefore, the board of directors has passed a resolution reaffirming the Alliance's commitment to maintaining a profitable and thriving trade climate for the oil and gas industry.

The group said it would continue working with government officials to ensure that, if renegotiated, NAFTA will retain a low/zero-tariff trade structure in a way that continues to foster the expansion of unfettered energy trade and investment between the U.S., Canada, and Mexico; be enacted with no sunset provisions; and retain its current form if an agreement cannot be reached as a result of ongoing negotiations.

''The North American Free Trade Agreement… has contributed to growth and jobs in the Texas and U.S. oil and gas industry—it is providing new markets for domestic energy production; and is lowering the costs to consumers in all three countries,'' said Ingham.. ''Taken as a whole, North America is on the verge of achieving energy self-sufficiency—a longstanding goal that has enjoyed significant advancement under NAFTA.''

Targa Resources Boosting Gas Processing Capacity

Targa Resources (Houston) has entered into an agreement to expand its natural gas processing joint venture with





It's blue skies ahead for Jay and Shelli Sweede

Couple Sells Propane Business to EDP – Cites Buyer's Integrity and Customer Focus

Nearly 13 years after making the transition from displaced propane industry veterans to entrepreneurs, Jay and Shelli Sweede made another career pivot – this time on their terms – to become retirees. In late summer of 2017, the Sweedes transitioned CC Propane of Wapakoneta, Ohio, to Energy Distribution Partners (EDP).

According to Jay, selling to EDP was a logical decision due to how he felt his customers would be treated. Said Jay, "I got comfortable selling to EDP by watching their local managers, and how the employees transacted business."

The Sweedes, with 30+ years of collective industry experience by late 2004, found themselves on the outside looking in when their longtime employer changed hands. Knowing the market and the industry, they launched CC Propane in early 2005. "We knew there was a need for a mom and pop-style service, and it only made sense to continue in the market that we knew," said Jay. They subsequently grew the CC Propane brand by providing hands-on service to more than 2,000 customers in a multi-county area.

Over time, CC Propane earned the attention of several suitors. But when the time came for the Sweedes to consider a change, it was EDP that stood out. "What we really liked," said Shelli Sweede, "was that EDP was professional and treated us with respect, even having CEO Tom Knauff answer several of our concerns."

With the transition complete, Jay and Shelli can relax. "We're ready to see CC Propane grow to the next level," said Jay, "and we're glad it won't just get folded into a bigger industry play, as a different partner might have done."



Mark Zimora, 30-year industry veteran and EDP VP Operations and Corporate Development, congratulates Jay and Shelli Sweede on the sale of CC Propane. For more information, contact Mark at 312-254-5954 or mzimora@edplp.net. All inquiries are held in strict confidence.

MPLX LP (Findlay, Ohio) in Oklahoma. Through its 60/40 Centrahoma Processing LLC, Targa and MPLX will construct a new 150-MMcfd cryogenic natural gas processing plant in Hughes County, Okla., the Hickory Hills plant, to process growing natural gas production from the Arkoma Woodford Basin.

The Hickory Hills plant is expected to begin operations in the fourth quarter of this year. Targa is contributing to Centrahoma its existing 150-MMcfd cryogenic Tupelo plant in Coal County, Okla. In exchange for Targa's contribution of assets, it will retain its 60% interest in the expanded joint venture and will receive a cash distribution. MPLX will contribute cash to Centrahoma to maintain its 40% interest.

In addition, Targa Resources has entered into a 50/50 joint venture with Hess Midstream (Houston) to construct and own a new 200-MMcfd natural gas processing plant at Targa's existing Little Missouri facility south of the Missouri River in McKenzie County, N.D. The new LM4 plant is expected to cost about $150 million and is anticipated to be complete in the fourth quarter of 2018.

Targa will manage construction and will operate LM4. The joint venture is underpinned by Hess Midstream's and Targa's significant dedicated acres in the Bakken. Targa notes its joint ventures highlight its continued focus on aligning with attractive strategic partners in opportunities that are capital efficient and are expected to drive greater incremental volumes over time.

EIA Increases 2018 Oil Price Forecast By Nearly $3/bbl

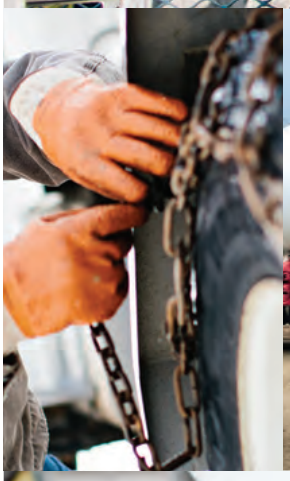
The Energy Information Administration's (EIA) latest *Short Term Energy Outlook* raises forecast crude oil prices by nearly $3/bbl compared to its previous report. Average monthly Brent prices have risen for seven consecutive months and, on Jan. 11, 2018, spot prices moved above $70/bbl for the first time since December 2014. EIA projects that Brent spots will average about $62/bbl in both 2018 and 2019, compared with 2017's $54/bbl average.

The agency forecasts West Texas Intermediate (WTI) crude oil prices to average $4/bbl less than Brent prices in both 2018 and 2019. The upward revision for prices results in higher U.S. crude oil output throughout the forecast. However, EIA notes that with relatively little production growth from members of OPEC and higher global consumption, world oil balances remain largely unchanged from its January 2018 forecast.

Crude oil prices have increased over the past seven months as oil inventories, both in the U.S. and globally, have fallen steadily. In January, oil prices may have received some support following OPEC's compliance monitoring











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meeting, where some energy ministers suggested extending the production-cut agreement in some form beyond the scheduled expiration at year's end. Rapid declines in Venezuelan output are also likely contributing to higher prices. Average U.S. imports of crude from Venezuela fell to less than 400,000 bbld for the four weeks ending Jan. 26, nearing the lowest level in decades.

EIA estimates that U.S. crude production averaged 10.2 MMbbld in January, up 100,000 bbld from December 2017. It estimates that total U.S. crude production averaged 9.3 MMbbld in 2017 and will average 10.6 MMbbld in 2018, the highest annual average U.S. output ever, surpassing the previous record of 9.6 MMbbld set in 1970. EIA forecasts 2019 production will average 11.2 MMbbld.

OPEC total liquids production is expected to grow modestly through the forecast period, averaging 39.4 MMbbld in 2018 and 39.9 MMbbld in 2019. As a result, the agency estimates that global inventories will build by 200,000 bbld over both years, indicating the global markets are largely in balance.

Although EIA expects oil prices to decline in the first half of 2018, the timing and magnitude of price moves are uncertain. Global economic developments and geopolitical events in the coming months have the potential to push oil prices higher or lower than the current *Short Term Energy Outlook* forecast. Uncertainty remains regarding the adherence to, and duration of, the OPEC and non-OPEC production cuts. Another key unknown in the oil market is the continued dynamism of the U.S. shale sector and how it responds to recent oil price increases with regard to capital outlays and potential input costs escalation. Although the pace of economic growth is expected to quicken this year, there are both downside and upside risks to that forecast, and significant deviations could influence oil prices.

Hydraulically Fractured, Horizontal Wells Account for Most Drilling

The Energy Information Administration (EIA) reports hydraulically fractured horizontal wells accounted for 69% of all oil and natural gas wells drilled in the U.S. in 2016 and 83% of the total linear footage drilled. The combination of horizontal drilling and hydraulic fracturing has increased the rate of recent U.S. crude oil, lease condensate, and natural gas production.

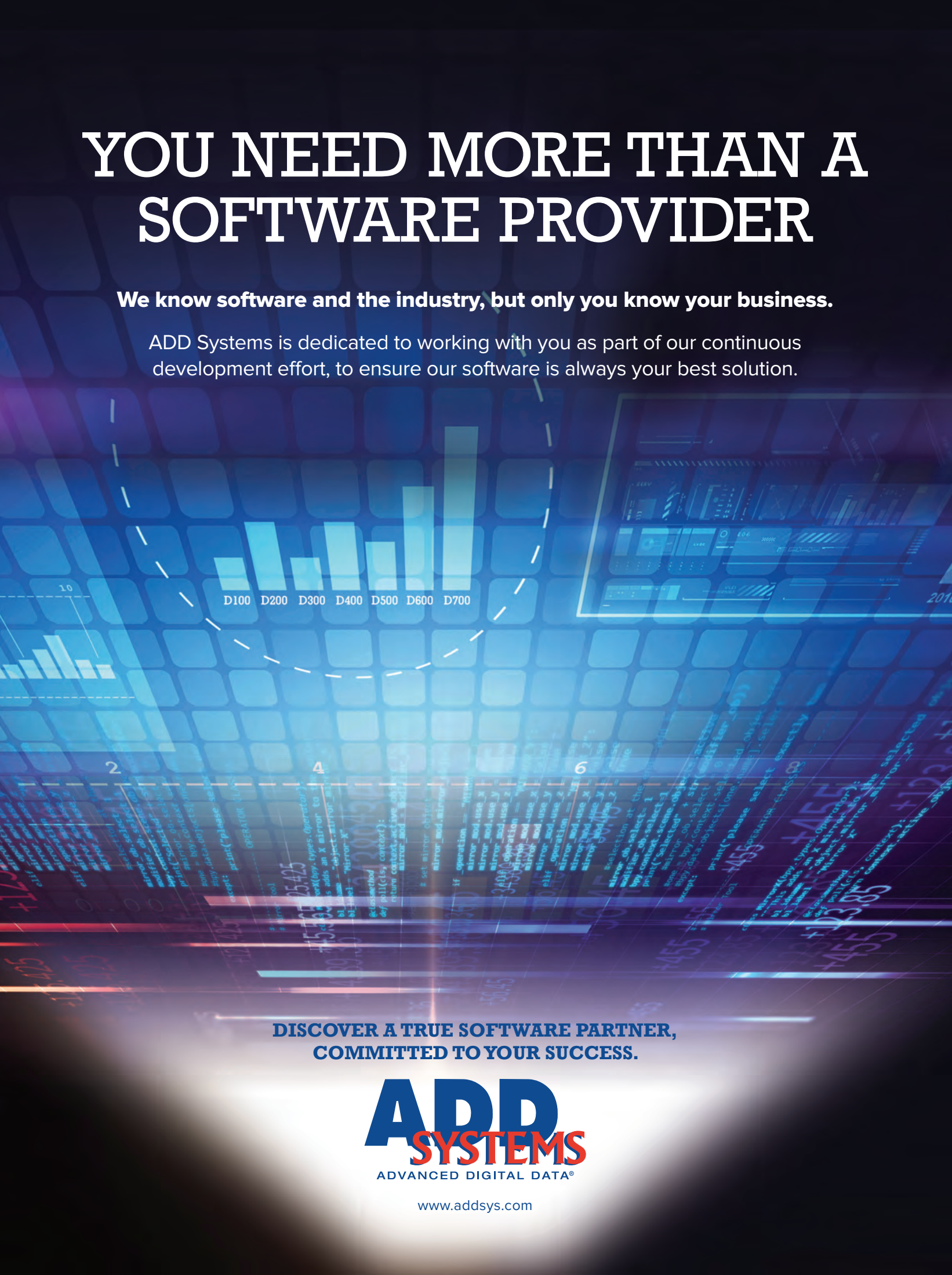
Hydraulically fractured horizontal wells became the predominant method of new U.S. oil and natural gas development in October 2011 when total footage, in linear feet, surpassed all other drilling and completion techniques. The combination of horizontal drilling and hydraulic fracturing has contributed to increases in domestic crude oil and natural gas output.



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EIA notes that although horizontal drilling has been used for nearly a century, its use as a source of U.S. oil and natural gas production began growing in the early 2000s. The process involves drilling a well vertically to a certain depth and then bending the path of the drilling until it extends horizontally. Because they are longer, and the drilling process is more complex, a horizontal well is generally more expensive to drill than a vertical well, but it is expected to produce more crude oil and natural gas. Horizontal drilling allows more of the wellbore to remain in contact with the producing formation, increasing the amount of oil or natural gas that can be recovered.

In 2016, total drilled footage reached nearly 13 million feet, about 10.7 million of which were hydraulically fractured and horizontally drilled. The length of the horizontal section, or lateral, can range from a few hundred feet to several miles. Hydraulically fractured horizontal wells have accounted for most of all new wells drilled and completed since late 2014. As of 2016, about 670,000 of the 977,000 producing wells were hydraulically fractured and horizontally drilled.

EIA explains that hydraulic fracturing is a completion method, meaning it is performed after the oil or natural gas well has been drilled. Like horizontal drilling, the technique has been practiced for many years, but it has only recently become a major part of U.S. production in combination with horizontal drilling.

Ferrellgas Sells Bridger Energy; Terms and Buyer Undisclosed

Ferrellgas Partners LP (Overland Park, Kan.) said in mid-January it had sold Bridger Energy LLC, a subsidiary of Bridger Logistics, itself a subsidiary of Ferrellgas LP, to an undisclosed buyer. Details of the transaction were not released.

''This transaction is a clear example of Ferrellgas' commitment to debt reduction,'' said James E. Ferrell, interim CEO and president. ''The sale significantly reduces our interest expense, improves our credit metrics, and lessens the company's reliance on its credit facility as we move forward with growth efforts.''

With the sale, Ferrellgas will exit Bridger Energy's oil purchase and sale activity, and as a result will be able to realize a near-term reduction in letters of credit issued to support Bridger from its current credit facility of about $80 million. On an annualized basis, the interest expense savings associated with the reduction in issued letters of credit and surety bonding of the business will be about $4.5 million.

''Strategically, we will continue to execute on objectives that raise cash and reduce expenses, particularly initiatives that are not weather dependent. We have excellent momentum, and we continue to see solid progress toward our goals,'' said Ferrell.

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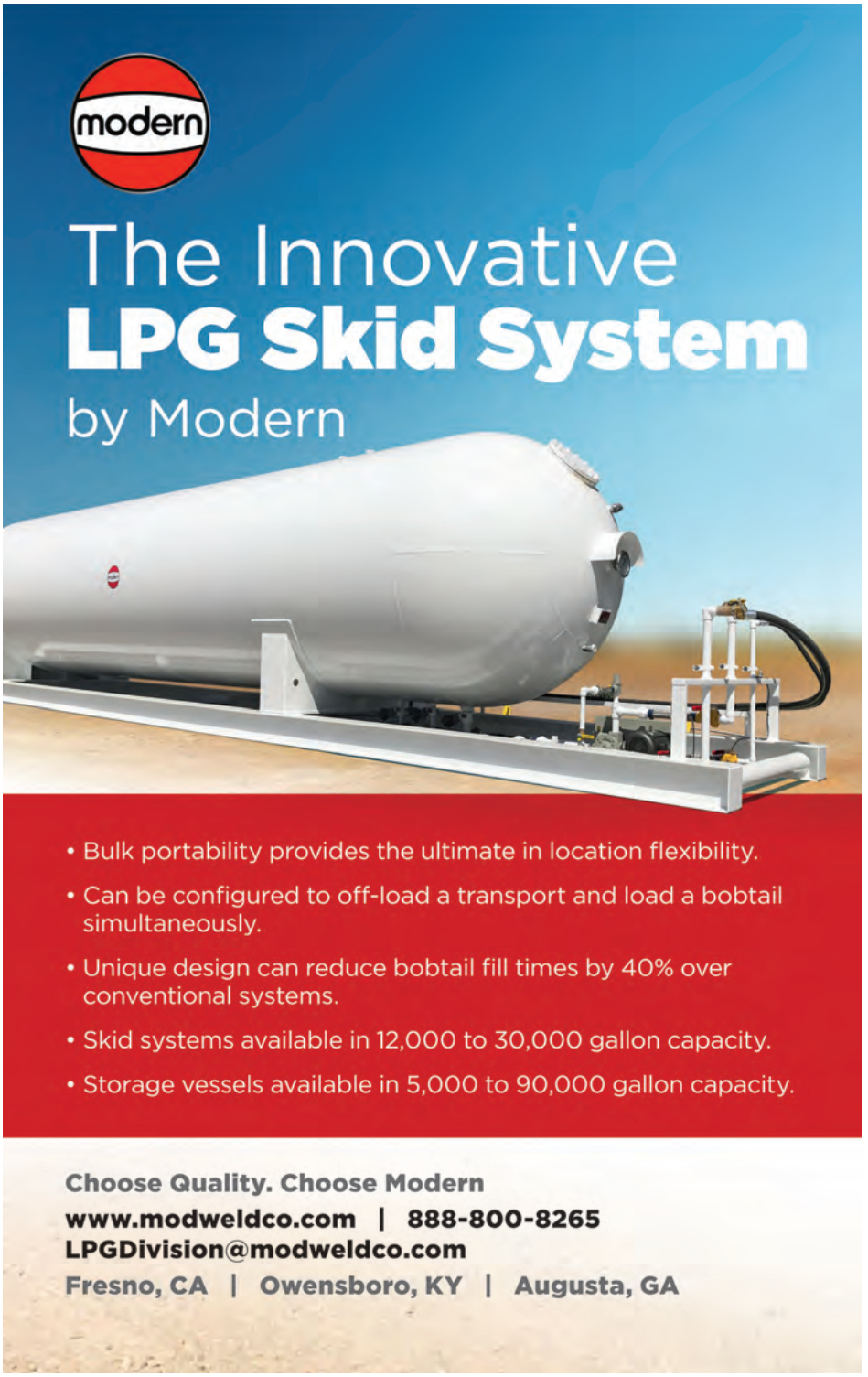
Propane and the Law

(Continued from p. 10)
and so it fell to the Court of Appeals in the Elmore case to do so.

The court's opinion discusses rulings on this issue from across the country. It noted that the transmission of natural gas and petroleum products by pipeline "is a common activity in a highly industrialized society such as our own." It further noted that "gas companies are subject to strict federal and state safety regulations," and that "the [hazards associated with] transmission of gas through underground lines can be eliminated by the use of reasonable care and legislative safeguards." It also noted the widespread hauling of gasoline in commercial quantities upon public highways, which is not deemed an ultra-hazardous activity.

Based upon its analysis, the appellate court concluded "that the transportation of liquid propane is not an ultra-hazardous activity for purposes of strict liability." This decision brings Mississippi squarely in line with court decisions across the country.

David Schlee is a shareholder in the Kansas City law firm of Schlee & McCarthy PC. He can be reached at drschlee@schleelaw.com.



Outdoor Gas Fire Pit Recalled

The Consumer Product Safety Commission (CPSC) reports certain Hampton Bay brand 50,000-Btu, 30-in., outdoor gas fire pit table/patio heaters are being recalled due to fire and burn hazards. Units with model numbers G-FTB51057B and UPC 6944937601579 are involved. The fire pits have an antique bronze finish with a natural slate tabletop and a black base that holds a propane cylinder.

CPSC notes the manufacturer has received three reports of consumers who were burned while turning off the propane cylinder after using the fire pit. The bowl base lacks a heat shield to protect consumers from burns. The units were sold exclusively at Home Depot stores nationwide and online from August 2016 to November 2017 for about $200.

The manufacturer is Zhejiang Yayi Metal Technology Co. Ltd. of China. The recall is being conducted voluntarily by the company under CPSC's Fast Track Recall process. Consumers should contact Yayi for a free repair kit, which includes a heat shield and installation instructions. The Yayi toll-free number is (855) 600-9294. The email address is *customercare@china-yayi.com*. Information regarding the recall is also available at *china-yayi.com*.



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As Temps Tumble, Demand for High-Value Trucks Soars

Arrow Tank & Engineering

"Sales of retail propane trucks always have their peaks and valleys," says Brian Amthor, executive vice president at Amthor International Inc. (Gretna, Va.). "The last couple of years were valleys, but we're now making a move back up to the peak." All of the truck builders *BPN* spoke with recently described sales as being back on the rise and there are several factors in play. "We've really had the perfect storm," says Scott Swensen, sales representative of Lin's Propane Trucks (Dighton, Mass.), and December's Bomb Cyclone that sunk temperatures well below zero during the last half of that month was only part of the storm Swensen was referring to.

"Sales of retail propane trucks always have their peaks and valleys. The last couple of years were valleys, but we're now making a move back up to the peak."
—Brian Amthor
Amthor International Inc.



"The cold weather is certainly a factor," comments Tim Schweppe, Arrow Tank & Engineering Co.'s general manager for the propane division (Minneapolis). "But, we started to see inquiries pick up during an above-normal fall for dryer gas in the areas around Minnesota." Both Schweppe and Milt Swenson, truck and trailer division sales manager at Westmor Industries (Morris, Minn.), saw interest in new trucks start to pick up in early fall, which they attribute not only to crop drying but also to overall pent-up demand for newer trucks. "For several years, retailers were tight on cash due to

"For several years, retailers were tight on cash due to warm winters and haven't had as many repairs since the trucks have had less stress. By late summer, more and more retailers were concerned it was time to replace or refurbish their trucks."

—Milt Swenson
Westmor Industries



warm winters and haven't had as many repairs since the trucks have had less stress. By late summer, more and more retailers were concerned it was time to replace or refurbish their trucks," Swenson said. "A third aspect is that since last fall's elections, the attitude about the business climate is better."

The attitude improved further near the end of 2017 with the passage and signing into law of the Tax Cuts and Jobs Act, which, among other things, increased the deduction limit for qualifying equipment and software purchased or financed during the tax year from $510,000 in 2017 to $1 million in 2018 and beyond. "Larger propane dealers are able to buy a lot more equipment and take advantage of this deduction," said John Hawkins, CEO of H&H Sales Co. (Huntertown, Ind.). "This deduction [from the Tax Cuts and Jobs Act], and retailers having more money from winter sales, is keeping us busy."

Nathan Roberts of Fisk Tank Carrier (Columbus, Wis.) is pleased with recent business activity. "Sales have gone to crazy high volumes. In the past 10 days, I've sold seven trucks to seven different companies," he adds. "That's amazing considering how slow sales were last year." Industry veteran Joe Rose, who joined Lin's Propane Trucks (Dighton, Mass.) recently, gives the credit for increased sales to Mother Nature. "We have many more trucks on order than last year. We're off to a great start in 2018." Rose advises retailers contemplating the purchase of a new truck or trucks to get on the list. "We are able to do a lot of trucks, but we are getting booked further and further out and we hate to disappoint our customers."

Go Big or Go Home

It's not just more trucks being purchased, it's bigger trucks with more features. "The recent trend for bobtails in the propane industry has been 'go big or go home,'" Danny McElroy, executive vice president/general manager of White River Distributor's Southwest Sales (Dallas), explains. "With bobtail vessels now being fabricated 5000, 6000, and even exceeding 7000 water gallons [w.g.], the proliferation of the big tank is the new industry standard." But the big tanks come with a price, he notes. "Add on the 12% federal excise tax to



"This deduction [from the Tax Cuts and Jobs Act], and retailers having more money from winter sales, is keeping us busy."

—John Hawkins
H&H Sales Co

PROPANE AUTOGAS
CLEAN AMERICAN ENERGY

PERC at the Work Truck Show

During the upcoming NTEA Work Truck Show in Indianapolis, fleet owners and managers will have an opportunity to learn how propane autogas reduces a fleet's emission profile and its total cost-of-ownership when they visit the Propane Education & Research Council (PERC) booth. Mike Taylor, director of autogas business development at PERC, plans to inform attendees while having some fun at its booth.

PERC will host an interactive activity with prize giveaways for attendees. It is designed to help participants visualize the emissions reductions offered by propane autogas vehicles.

On display at the booth will be several propane vehicles and equipment, including a Ford F-650 from Roush CleanTech; a Ford F-150 from Alliance AutoGas; a GM chassis from Power Solutions International; and an autogas dispenser from Superior Energy Systems.

Taylor will also host an educational breakout session on March 7 titled "A Clean Fuel at the Best Overall Cost," which focuses on autogas' role in cost-effective emissions reduction for fleets of all sizes.



Ride & Drive Planned for Work Truck Show Attendees

Alliance AutoGas (AAG) will be offering several opportunities for attendees to interact with high-performance propane autogas technology, including a converted autogas vehicle, at the 2018 NTEA Work Truck Show. Ride and Drive participants can experience the operation of the AAG fleet F-150 truck that was converted live at the show in 2016. The record-setting installation by AAG included a "Plug and Play" conversion system with a secondary fuel tank to store the autogas, an injector spacer plate, and engine control unit. Attendees will have the opportunity to drive this same high-performing vehicle (after two successful years on the road).



H&H Sales Co.

the price tag and you have got one expensive bobtail. That 12% tax is why the old standard in the industry kept the tanks below 3500 w.g. and on a single axle." McElroy adds that although tanks 3500 gallons or a little less are still the bulk of the builds, White River Distributors is also seeing a market trend to smaller, more maneuverable bobtails with vessels ranging from 750 to 1600 w.g. "We have a multitude of customers wanting a four-wheel-drive chassis and a bobtail that can get in the tough, rugged areas where the big boys can't tread."



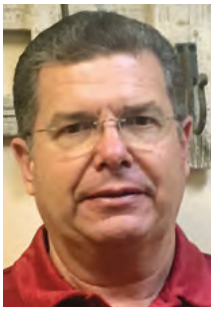
"With bobtail vessels now being fabricated 5000, 6000, and even exceeding 7000 water gallons [w.g.], the proliferation of the big tank is the new industry standard."

—Danny McElroy
White River Distributors

According to McElroy, his company recently delivered several 1200-w.g. vessels on four-wheel-drive Ford F-550s and Dodge 5500s in New Mexico. "We are now in the process of a build for a customer in Upstate New York with a 1600-w.g. vessel and a 1320-w.g. vessel for another customer in Arizona. With our special relationship with National Tank in Hernando, Miss., we will continue to build custom tanks of all sizes to accommodate the many different needs of the retail propane marketer."

Why are propane retailers willing to pay more for the bigger trucks? "There had been concern that larger bobtails would damage driveways and be harder to maneuver," said Kurtz Truck Equipment's (Marathon, N.Y.) vice president of sales and marketing Roger Smith. "Once companies began to see that these concerns were overblown, the interest in 5000-gal. vessels and larger began to take off." Smith notes that a key benefit to the larger bobtails is that drivers of smaller vessels will often run out of gas mid-afternoon far from the bulk tank and have dead time near the end of the day. He also notes that retail propane marketers are becoming more willing to invest in other features that enhance efficiency. "Multiple hose reels are becoming more and more common on a bobtail. Now drivers with three hose reels can fill three autogas vehicles all at the same time."

Joey Runnels, a sales representative at Mississippi Tank Co. (Hattiesburg, Miss.), cautioned that even though the larger bobtails are becoming more accepted, retail propane marketers need to carefully assess the roads and bridges the truck will travel before buying.



"The geography and the infrastructure of the travel area needs to be considered before making the purchase. The larger vessel is certainly perfect for larger commercial and industrial accounts with wider roads and bridges on their route."

—Joey Runnels
Mississippi Tank Co.

"The geography and the infrastructure of the travel area needs to be considered before making the purchase. It may make sense to use a larger truck in some areas, and a smaller truck in more rugged areas. The larger vessel is certainly perfect for larger commercial and industrial accounts with wider roads and bridges on their route." Mike VandenBoom, president of Signature Truck Systems (Clio, Mich.), added, "Bobtails are definitely changing and the needs can be as geographical as pure overall efficiency. Marketers in mountainous regions are cautious to manage their gross weight-to-power balance. But, overall, there is growing interest in larger bobtail trucks."



"Bobtails are definitely changing and the needs can be as geographical as pure overall efficiency. Marketers in mountainous regions are cautious to manage their gross weight-to-power balance. But, overall, there is growing interest in larger bobtail trucks."

—Mike VandenBoom
Signature Truck Systems

Schweppe adds, "Our customers have observed the need to upgrade their equipment to serve the customer's needs. Our MO-FLO product lineup provides more bobtails with more flow to get the job done." According to the Arrow Tank & Engineering general manager, the typical build for this job is 5300 gallons up to 6700 gallons with flow rates of 80 gpm up to 120 gpm, depending upon what the customer needs. "Our ability to maintain flow rates with tank stability throughout the delivery has become a standard for nearly every bobtail we build, no

"Our ability to maintain flow rates with tank stability throughout the delivery has become a standard for nearly every bobtail we build, no matter what size. Efficiency, reliability, and longevity are everything!"

—Tim Schweppe
Arrow Tank & Engineering Co.



matter what size. Efficiency, reliability, and longevity are everything!"

Steve Bloomstrand, sales and marketing manager of Rocket Supply (Roberts, Ill.), is also seeing more and more independent retail propane marketers in his area stepping up to bobtails that haul 5000-plus gallons, and said concerns with driveway damage and maneuverability have not turned out to be major problems. "In addition, these marketers are also liking features such as the automatic hose reel-out. Larger cabs are in higher demand." Schweppe concurs. "Never in my wildest dreams did I expect to be building extended cabs for stock—moreover 5300-gallon extended cabs. Bobtails and operators are expected to work their hardest in the harshest environments. Added space and an air-ride cab could possibly help attract and retain drivers, which is a difficult task these days."

Features for Creature Comforts

Larger cab size for bobtail trucks is just one of many features unheard of just a few years ago. Wayne Terpstra of Utility 1 Source (Kansas City, Mo.) notes efficiency and driver comfort are big benefits buyers now seek to attract and keep drivers. "They want ease of use for electronic devices to communicate in real-time to the office. They want employees to be able to utilize state-of-the-art hand-held electronics to maximize efficiency, and they want it to be a comfortable process," he said. "The company is wanting to reduce office staff and wasted delivery miles. They want billing to be instantaneous." Rob Vandemark, who runs the truck division at Industrial Propane Service Inc. (IPS; Byron, Mich.), agrees. "There are many in-cab electronic solutions to choose from now. Bobtails equipped to work well with few interface issues are in demand," he explained.

An automatic transmission is one more benefit drivers like, according to Arch Hudelson, special projects director at Meeder Equipment Co. (Fresno, Calif.). "Automatic transmissions, air-conditioning, and power windows are three key features that keep drivers happy." Bloomstrand

"There are many in-cab electronic solutions to choose from now. Bobtails equipped to work well with few interface issues are in demand."

—Rob Vandemark
Industrial Propane Service Inc.





"Automatic transmissions, air-conditioning, and power windows are three key features that keep drivers happy."

—Arch Hudelson
Meeder Equipment Co.

New LPG Filtration System Benefits Autogas Fleets

Alliance AutoGas (Swannanoa, N.C.) has aligned with Donaldson Co. (Valencia, Calif.) to release a new line of clean LPG filters that remove potentially harmful particulate matter and heavy ends from propane systems. The filters were designed specifically for the propane industry.

While it's common for gasoline and diesel fuels to be filtered multiple times as they are transported to an end-user, propane has historically not been filtered. As propane, or in this use autogas, has gained popularity as a transportation fuel, consistent fuel quality has become a greater need for fleet customers. Two new filters, available from Alliance AutoGas and Donaldson, have been explicitly designed to eliminate potential fuel contamination issues with autogas fuel dispenser systems. A highly efficient primary LPG particulate filter was developed to remove 99% of harmful particulates 0.5 micron and larger. Additionally, through Donaldson's expertise in carbon filtration products, a secondary absorbent carbon filter was specifically engineered to remove heavy ends without removing the odorant from propane.



Industry experts were consulted during the R&D process, resulting in a design that exceeds the highest industry safety standards. The filter housings are made from a high-phosphorus nickel-plated steel, meeting current NFPA 58 (5.17.1.3) requirements for pressure-containing metal parts, unlike other currently available autogas filtration products.

According to the companies, fleets demanding maximum performance from their propane vehicles benefit from the implementation of filtration products through reduced vehicle downtime and maintenance. The dual-filter design can be tailored to a fleet's specific needs; the filters can be sold and installed separately or together, to ensure a customized solution.

Located at booth 5784, AAG will showcase the new Donaldson Clean LPG Filtration System, which will be displayed at the booth.

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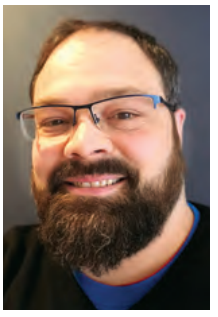
of Rocket Supply mentioned rear-vision camera systems and power mirrors as two more features drivers like, while Hawkins of H&H Sales listed 110-volt systems to power cell phones and laptops. Brian Amthor indicated that trucks with the capacity to carry a lot of tool boxes is an added benefit, especially if the tool boxes can all be locked down with the click of a button. Bluetooth audio is another newly sought feature, Fisk Tank Carrier's Roberts added.

Multi-Purpose and Low-Maintenance

Most of the company representatives *BPN* spoke with explained there are many instances where retail propane companies were willing to invest more in their trucks in exchange for the payout of improved efficiency and less maintenance and repair costs. Hawkins of H&H Sales noted that many retailers are spending more money on trucks that can perform multiple functions, such as bobtails that are also equipped to deliver cylinders. Roberts said many are willing to buy larger trucks that can haul two 1000-gal. tanks side-by-side. This helps guarantee the company can always work off

Many are willing to buy larger trucks that can haul two 1000-gal. tanks side-by-side. This helps guarantee the company can always work off one truck to set two tanks per day without having a long drive back to the plant mid-day to get the second tank.

—Nathan Roberts
Fisk Tank Carrier



one truck to set two tanks per day without having a long drive back to the plant mid-day to get the second tank. "We're building trucks lighter with aluminum platform tailgates and aluminum is used more in the construction of the body," Hawkins observed. "The lighter the truck, the more cylinders it can be allowed to haul." In addition, some prefer truck beds 14 feet in length because it allows an entire 1000-gal. tank to sit on the bed rather than a portion hanging off the back.

"Our service trucks have evolved through direct input from both customers and our 'propane guys' who build them," said Bruce Whitney, vice president at Signature Truck Systems and Granby Industries Propane Group (Clio, Mich.). "New cabinet designs unique to us include cabinets to protect copper and plastic pipe, [which resulted] from customer input. And we have hidden a drawer in the truck frame to hold risers that otherwise can become damaged."



"Our service trucks have evolved through direct input from both customers and our 'propane guys' who build them."

—Bruce Whitney
Signature Truck Systems

"From a maintenance standpoint, I think retailers are seeing the big picture now better than before about the value of paying for better products and to avoid costly repairs and downtime in the dead of winter," said Swensen of Lin's Propane Trucks. "We see more people spending an extra $400 here and there on features that could save them $2000 or more for repairs, plus downtime, later. Flange valves are an example, since they make repairs easier and are less prone to leaks than threaded valves. We've seen a move from carbon steel to stainless steel, which lasts longer." Smith of Kurtz Truck Equipment mentioned that many companies like Marshall Excelsior's new product that doesn't allow a truck to move if the hose is not in place.



"From a maintenance standpoint, I think retailers are seeing the big picture now better than before about the value of paying for better products and to avoid costly repairs and downtime in the dead of winter."

—Scott Swensen
Lin's Propane Trucks

Financing and Renting

Most companies acknowledged there are more lease-to-own options than ever before. Some are offered in-house directly to customers and some are offered by third-party vendors such as Vision Financial Group (VFG; Pitts-

burgh). Another concept mentioned by Westmor's Swenson and Terpstra of Utility 1 Source is an option to rent propane bobtails and service trucks. "We have 20 trucks for this specific purpose and 18 of them are rented out

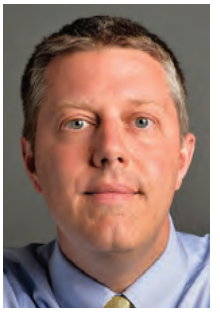


Renting bobtails and service trucks "allows companies to have the trucks they need, when they need them, without having to immediately make a huge capital investment."
—Wayne Terpstra
Utility 1 Source

right now," Terpstra noted. "This allows companies to have the trucks they need, when they need them, without having to immediately make a huge capital investment. They can simply return the vehicle when they don't need it anymore."

Other Innovations

Propane trucks fueled by propane are not a new innovation, but new engine technology is making them a better option than ever before, according to Ed Hoffman, president of Blossman Services (Ocean Springs, Miss.). "Sales of the Ford F-Series trucks for tank-set trucks, service trucks, and bobtails are up," he said. "Telematics systems are becoming more commonplace on trucks to



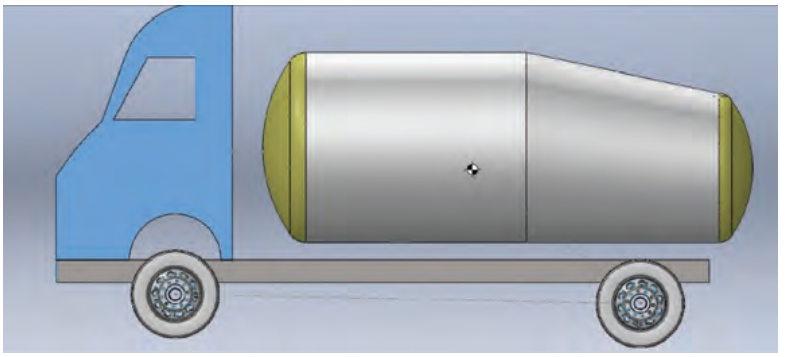
"Sales of the Ford F-Series trucks for tank-set trucks, service trucks, and bobtails are up. Telematics systems are becoming more commonplace on trucks to maximize efficiency."
—Ed Hoffman
Blossman Services

maximize efficiency." Hoffman believes more and more retailers will ultimately move toward propane-fueled trucks. "Meter systems such as BASE, Cargas, and Raven are also improving efficiency with routing," said Runnels of Mississippi Tank.

A bobtail with a whole new shape is now being offered by Exosent Engineering (College Station, Texas). According to director of business development Gerald Pearson, the new bobtails are shaped to have a lower center of



The new bobtails are shaped to have a lower center of gravity, adding to safety by reducing the likelihood of rollovers. "The cone shape also reduces the slosh factor."
—Gerald Pearson
Exosent Engineering



Exosent Engineering

gravity, adding to safety by reducing the likelihood of rollovers. "The cone shape also reduces the slosh factor," Pearson added. "Insurance companies are giving incentives for using this truck." A few years ago, Exosent also developed a transport trailer with a similar shape and a lower center of gravity.

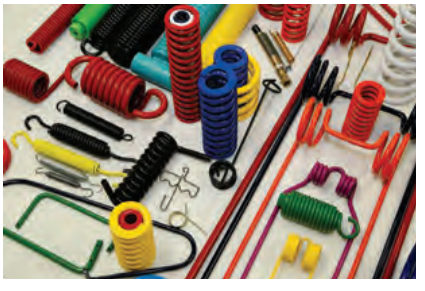
With warmer weather and trade shows around the corner, it does make sense to beat the rest of the herd and get orders in for new trucks to be prepared for next winter. *—Pat Thornton*

WORK TRUCK SHOW PRODUCTS

HAND CLEANER. Gritty hand cleaner from **Meyer's Distributing** is a solvent-free industrial-strength cleaner fortified with all-natural walnut shells that penetrates grease and grime on hands, around fingernails, and in the creases of knuckles. It can be used with or without water. The cleaner removes grease, ink, paint, adhesives, tar, asphalt, and carbon, while leaving hands clean, soft, and smooth even with repeated washing. *www.meyerdistributing.com*



WIRE SPRINGS. Myers Spring Co. produces fine wire precision springs with wire diameters ranging from 0.006-in. to 0.750-in. full hard and 1.200 annealed. These springs are produced from a range of materials and are integral components for a variety of products, including industrial, automotive, agricultural equipment, and appliances. *www.myersspring.com*











ROUSH CleanTech Engines 75% Cleaner than Emissions Standard

Roush CleanTech (Livonia, Mich.) recently introduced the first propane autogas engine certified to the lowest nitrogen oxide (NO_x) level available in Class 4-7 vehicles. This new engine is Environmental Protection Agency- and California Air Resources Board-certified for 0.05 NO_x emissions, which is 75% cleaner than the current emissions standard.

According to Todd Mouw, vice president of sales and marketing, a propane autogas engine is available that can help fleets meet internal or external emissions mandates, while at the same time saving money. Regarding price, "Consider that propane autogas [costs] up to 40% less than gasoline and up to 50% less than diesel," he said. "All this evidence leads to the conclusion that customers who want to reduce NO_x emissions and save money will transition to propane autogas—opening the opportunity for increased gallons sold for marketers."

Class 4-7 vehicles, which range from Frito Lay and UPS delivery trucks to school buses, have typically run on diesel fuel, Mouw explains. The complexity of meeting stricter emissions standards adds to the cost for diesel vehicles, in addition to the fuel itself being much more expensive. "These Class 4-7 vehicles have become a sweet spot for propane. Natural gas was trying to be a key player, but propane is better positioned to play a more effective role."

Stricter emissions standards affecting on-road motor vehicles began going into effect in 2010. However, during the past four to six years changes in engines have made it even harder for diesel fuel to meet those standards. "This presents a huge opportunity for propane," Mouw said. "Consider that, despite all of our progress, propane has just a 1.5% to 2% of the market share right now. With the clear cost advantages and environmental benefits for propane versus diesel, we should see propane market share continue to increase dramatically."

Now with well over 10,000 school buses running on propane serving 750 school districts across 48 states, Mouw points out that propane is widely accepted in this sector, and that will focus attention on propane's benefits in other categories as well. He underscores that the success stories in the school bus segment will help attract a lot of Volkswagen settlement dollars, further bolstering growth in school districts for buses. "With propane, we are at 10% of the school bus market," Mouw said. "If we get to 10% of all Class 4-7 vehicles, it would require an additional 100 million new gallons of propane a year."

As Mouw has been impressed by knowledge of the benefits of propane autogas spreading through the school bus marketplace, as well as many large beverage companies and other early adopters, he is concerned about the slowness of acceptance within the propane industry itself. "There are a few proactive retail propane marketers leading the way for propane autogas, but most remain skeptical. We could make tremendous headway if we could get more in the propane industry on board."

Mouw highlights that retail propane marketers can have influence in their communities well beyond the traditional sales approach. "There are many retail propane people on school boards across the country. That alone should help us make additional headway. We've come a long way since I joined Roush 10 years ago. We're excited to be down to 0.05 NO_x emissions, but we're working hard to get emissions down to 0.02 NO_x."

—Pat Thornton



Moving the Mail—Trucks Roll with Winter Cold

It's a safe bet that bulk plants churned faster this past winter compared to the previous two, even absent a stinging Polar Vortex. But there was a new and widely reported storm phenomenon moniker—a *bomb cyclone* that unleashed freezing blizzard conditions across wide areas. Overall, more sustained wintry cold meant trucks had to roll. Two transportation companies wheeling to meet ramped-up demand were Etchberger Trucking Inc. of Freeport, Ill. and C Three Logistics LLC of Newfield, N.J., both headed by customer-focused, next-generation owners.

Kris Etchberger of Etchberger Trucking and Henry Papiano of C Three Logistics founded their common carrier operations in recent years, following their fathers into the industry after previously working in the family businesses. Etchberger observes that this was his busiest winter so far and marked his company's third season hauling propane. "We were the busiest just after Christmas all the way through January and into February," he says, recounting that federal hours-of-service waivers aided his firm's efforts to serve customers and mitigated average two- to three-hour terminal loading times and some longer eight- to 12-hour waits.

The cold meant an all-hands effort at Etchberger Trucking, which operates nearly 40 trucks and a terminal in Indianapolis that houses the shop and safety director's office. That meant Kris, a husband of 19 years and the father of three, was behind the wheel himself much of the time. His brother, Ryan, also works in the business. He says his company started as more of a regional operator, "but now we follow the work." That took his transports farther afield this heating season, with trips into Tennessee and many into Michigan's Upper Peninsula. There were also opportunities for East Coast runs. He laments, "We asked for Florida loads but didn't get any."

Etchberger adds that the colder heating season brought him many new customers, ranging from mom-and-pops to bigs. "There were many situations where customers needed to be bailed out and reached out to us to supplement their regular transportation providers," he says. "All my transports were busy. I have more ordered but I won't get them until June or July. I really could have used them this winter." He adds that to be successful transportation companies need to be centered on customer service. That means sacrificing time at home when the calls come in and jumping into the driver's seat yourself when needed.

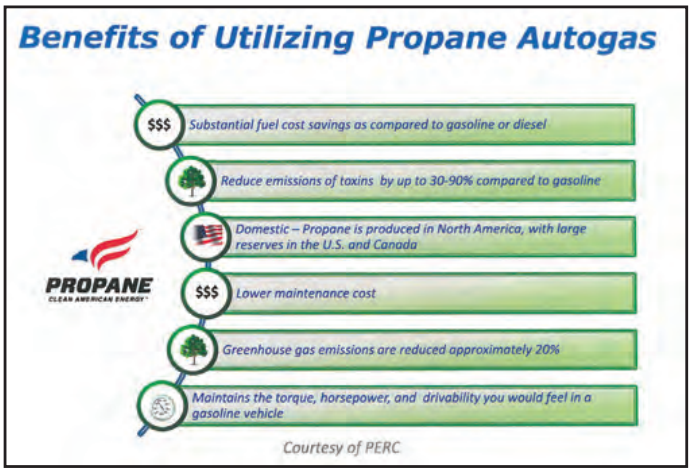
He recalls that his father, Rich, now retired and whose company hauled livestock and other products—whatever paid—didn't exactly encourage his entering the transport business. "When I told him I was going to buy my own truck he said it was one of the dumbest decisions I could make. I hauled everything from construction materials to hogs, then stumbled on the tanker thing, beginning with anhydrous. I had six trucks, leased another, and added drivers, but after a year or so that dried up and I had all this equipment."

Etchberger, forced to look around for other opportunities, determined he needed to own his own refined fuel trailers. In addition to propane, his company hauls lube oils and other products. "In this business doors close and doors open, and sometimes you have to force some open."

Family Legacy

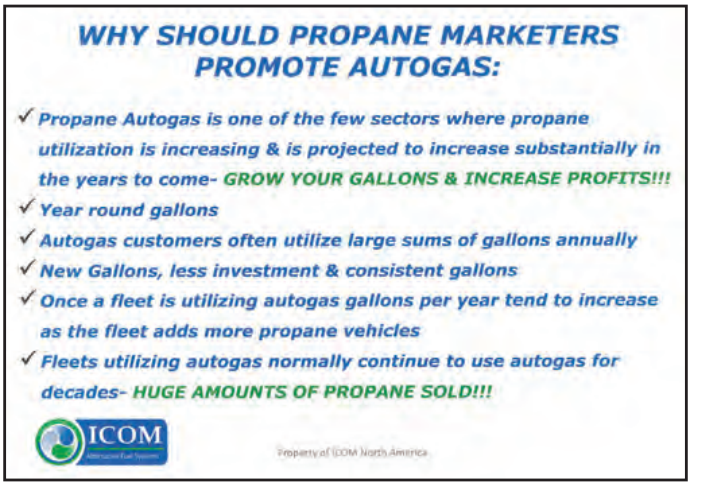
Many industry veterans undoubtedly recognized a familiar name. Henry Papiano, son of Papco LLC (Vineland, N.J.) founder and long-time transportation operator Henry Papiano, recently launched C Three Logistics with four units and a goal to quickly expand to 10, but in just a short time the company is now operating 40 trucks and transports. The

(Continued on p. 52)









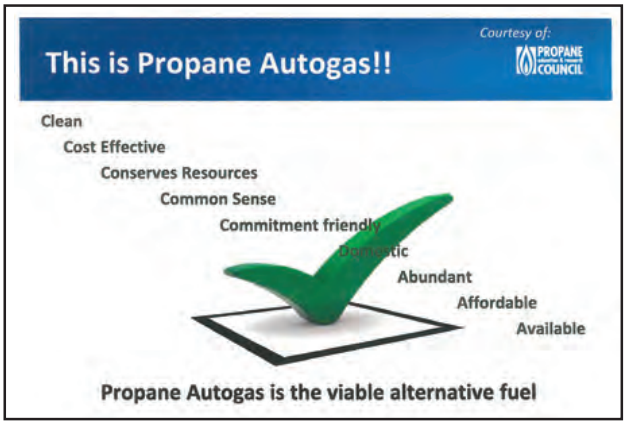
When Should Propane Autogas Be the First Choice?

Describing autogas as one of the most promising sectors for future increases in propane utilization, ICOM North America (New Hudson, Mich.) co-founder and chairman, Albert Venezio, will share insights on how to reap its benefits with his audience at the 2018 NPGA Southeastern Convention & International Propane Expo in Atlanta. His experience will equip dealers with the tools they need to capture the promise of this expanding revenue source.

During his presentation, he will acquaint propane industry professionals with methods to identify a fleet prospect, and illustrate, step-by-step, how to make the sale and close the deal. Marketers will leave with a solid understanding of critical benefits of propane autogas and how to communicate them to fleet representatives in a way that differentiates for fleet managers just why propane autogas is the ideal choice when compared to other potential alternative fuel options for fleets.

The advantages fleet owners can realize from utilizing propane autogas will be contrast with competing alternative fuel vehicles, including natural gas (CNG), electric (ZEV), and electric hybrids. Although these alternatives may have strong potential in certain fleet sectors, Venezio will identify transportation options where propane makes the most sense.

A comparison of cost, performance, fueling infrastructure, tank, pressure, vehicle system installation, service and other requirements will be explored for vehicles using the ICOM JTG Liquid Injection System, CNG, and other alternative fuel options. Venezio will explain which vehicle classes make the most sense for propane autogas fleet sectors and why now is the perfect time for propane marketers to promote autogas. —*Andrea Young*



Andy Ronald Retires, Leaves Legacy of Win-Win Solutions

When Andy Ronald was recruited by Inergy in July 2002 to manage supply for its retail propane operations he wasn't a newcomer to the energy industry. Ronald already had 33 years of experience, mostly in propane at Shell and later with Enterprise. As Inergy grew rapidly, the supply leadership responsibilities were divided into three regions: West, Mid-continent, and East. Ronald took over the East region as it was the most problematic, with constant supply shortages and long-leads being the norm.

During this time, Inergy's retail division had one rule: never run out of gas. From July 2002 to August 2012, when Inergy was sold to Suburban Propane, under Ronald's leadership the company achieved that goal. There were a few close calls, perhaps, but it never ran out.

Following the merger with Crestwood in 2013, Ronald took over relationships with national accounts for Crestwood. He then spent the next few years developing four successful rail terminals before retiring from Crestwood at the end of 2017. Recently, ***BPN*** discussed with Ronald his career accomplishments as well as activities he directed that will continue. A pattern of his mobilizing different people to achieve win-win solutions through 48 years in business, as well as philanthropy, is evident.

Two of Ronald's key career achievements came during his time with Shell, when he initiated the establishment of index pricing on the TEPPCO Pipeline in 1989 and on the Dixie Pipeline. These were considered game-changing initiatives in the wholesale propane supply world since standard pricing had formerly been the posted price with a discount. The concept of changing the formula for pricing was done as Shell dramatically ramped up the volume of propane available in the Gulf, and didn't want all the offshore production to be sold in its entirety to petrochemical plants in Louisiana when it could benefit several tiers of pipeline assets.

"The concept of index buying created more benefits for the retail propane marketers who could lock in a constant, agreed-to price over where Mont Belvieu was trading and know they had a guaranteed margin with hedging tools in place at Mont Belvieu," Ronald said. "This gave retail propane marketers more flexibility to protect margins and allowed Shell to commit more gallons beyond the petrochemical market. Soon, other companies followed the lead and began to offer index pricing."

In 2009, Ronald began his tenure as chairman of the National Propane Gas Association's (NPGA) International Committee, now the Propane Supply and Logistics Committee, as historic changes were taking place with dramatic increases in natural gas and propane production in the Marcellus shale. "A number of people didn't think the increased production would happen, just like many once thought Detroit would never create cars that ran on unleaded fuel," he commented. "During the time chairing this committee, we started educating the industry about the changes taking place and helped them understand how they would be affected."

Ronald played a leading role in the propane industry's response to severe supply and logistics constraints during the challenging winter of 2013-2014. In January 2014, at the height of the crunch, he was instrumental in initiating an industry strategy with the Federal Energy Regulatory Commission (FERC) to quickly move 350,000 barrels of propane from the Gulf Coast to relieve a severely short market in the Northeast and Mid-Continent. "This was accomplished over a weekend through joint efforts of key industry leaders, NPGA staff, and industry contacts. Through a series of phone calls during this urgent supply



Andy Ronald (right) shown with Chris Roth on the trading floor. Ronald hired Roth at Inergy shortly after college. Roth is now vice president of East marketing and supply for Crestwood.



shortage we were able to arrive at a solution that worked for all. It was the first such FERC exemption of its kind, but it set a precedent, and resolutions to future supply situations should happen faster."

Several months later, Ronald presented the industry's viewpoint on infrastructure needs relative to propane demand in the Northeast at a hearing for the U.S. Department of Energy's Quadrennial Energy Review. He highlighted the changes needed to support cost savings for the consumer by using U.S. production, particularly new shale gas production, versus higher-cost imported product. He was also able to use this testimony to highlight the importance of Crestwood's Finger Lakes storage project to reduce dependency on imports.





In June 2014, the NPGA Board of Directors named Ronald to the Finance Committee. He was later appointed to chair an industry group tasked with allying with the Surface Transportation Board (STB), which regulates the railroad industry. "This rail advocacy task force provides resources for NPGA members with rail shipping issues," Ronald explained.

In addition, the strong knowledge gained earlier in his career of the rail propane delivery process led to several projects that Ronald enjoyed immensely over the last five years—the oversight from concept to completion of four successful Crestwood railroad terminals: Davisville, R.I.; Rose Hill, N.C.; Peekskill, N.Y.; and Montgomery, N.Y. (***BPN***, October 2017, p. 22*)*. The Mongomery terminal is believed to be the largest propane rail terminal in the U.S (shown above).

"It has been very rewarding to work with people who said to go ahead and do it and supported me every step of the way," Ronald said of his Inergy and Crestwood colleagues. "With the rail terminals there were plenty of roadblocks and challenges with planning and zoning boards and others. Montgomery was perhaps the most complex real estate deal ever and it wouldn't have happened without the level of trust I enjoyed from Crestwood leadership."

Looking back, Ronald very much appreciates the friendships and support he has had from the propane industry. "I was fortunate to work in an industry where I had a real passion," he said. "I knew right away in my career in gas liquids I didn't want to do anything else." He also appreciates his wife and family for tolerating his frequent travels to make his projects come to fruition.

One more win-win situation Ronald spearheads with much support from propane industry friends benefits U.S. troops in places such as Afghanistan and other locations around the world. Named for Ronald's long-time friend, Wally Bostwick, one of the 10 most-decorated U.S. soldiers in Vietnam, the Wallace R. Bostwick Memorial Fund delivers holiday gift packages to troops based in the Middle East. This honor for the man who he considered a best friend, and the best man at his wedding, is designed to provide gifts and moral support to troops, recognizing their sacrifices as they labor miles from loved ones and absent life's pleasures back home. "By 2017, over 6000 gift boxes had been sent to the troops," he said. "Over the years, we've come up with a more cost-effective approach to be able to pack and ship more boxes. We've also enlisted school kids to decorate the boxes. This brings more cheer to the troops while also teaching the kids about the sacrifices the troops make to ensure our freedom and way of life." Ronald is also well known for spearheading an annual barbecue for bicycle riders and their supporters who participate in Kansas City's annual Bike MS event to benefit multiple sclerosis.

Although retired, Ronald remains involved in the propane industry. He stays in close touch with the Crestwood team and is working with others in the industry who seek his help with wholesale supply planning. He will also continue to be involved with NPGA. Most importantly, he will be able to spend more time with family while still staying in touch with long-time industry friends and the work he has enjoyed. "Overall, family and friends are the most important part of well-being in life. I've been blessed with both and look forward to the next chapters in my life." *—Pat Thornton*



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FEATURING KEYNOTE SPEAKER:
Greg Gumbel, CBS Sports



Cold Winter, New Strategic Plan: Hot Topics in Warm Santa Barbara

Gathering in early February for the National Propane Gas Association (NPGA) meetings in temperate Santa Barbara, Calif., board members and guests alike admitted they were ready for a break from the cold. Furthermore, industry members who have weathered two warm winters following the unnerving Polar Vortex of 2013-2014 seemed very satisfied with how the winter of 2017-2018 was unfolding. Propane leaders were eager to head to meetings to discuss the cold winter and plot the future direction of the industry.

Beginning with the NPGA Propane Supply and Logistics committee meeting, always one to draw a large crowd due to its relevance to most in the industry, members gathered for an update from Debnil Chowdhury, U.S. NGL research and consulting lead at IHS Markit (London). Chowdhury began his presentation, "Outlook for U.S. Propane Markets: Impact of Higher Production and New Export Capacity," by acknowledging NPGA's success in convincing the Energy Information Administration (EIA) to begin factoring the greatly expanded U.S. export levels into its calculation of estimated days of supply.



Debnil Chowdhury of IHS Markit updated NPGA members on the status of propane supply levels and how risk had been reduced for critical days of supply concerns.

He proceeded to review PowerPoint slides that had been part of the presentation used to convince EIA of the need to make the change. While EIA was not opposed to the concept, it still took pressure from a group of U.S. senators who were lobbied by NPGA to prompt the agency to finally agree to implement the change.

EIA defines days of supply for all refined products as a measure of the adequacy of inventories. It is calculated by taking the current stock level and dividing by product supplied (used as an estimate of demand) averaged over the most recent four-week period. While this formula was adequate when the U.S. was a net importer of propane, as the U.S. moved to exporting more than 1 MMbbld, NPGA made the case that exports should be included as a "demand" category when calculating days of supply. Prior to the revision, NPGA was calculating days of supply at least 20 days lower than EIA and advising industry members not to interpret EIA's calculations as the actual days of supply.

At the time of Chowdhury's presentation, the U.S. had just experienced eight weeks of severely cold temperatures. However, inventories were not being depleted as quickly as during the previous winter, which was one of the warmest on record. He explained that exports were much lower in December and January as Japan changed its minimum days of imports. In addition, strong growth in crude production is resulting in faster growth of propane, especially in the Permian Basin in Texas. While petrochemical demand in the U.S. has increased signifi-

cantly since 2014 when crude prices fell, ethane was the preferred feedstock in 2016 and 2017 due to lower values. This significantly curtailed propane demand from the chemical sector.

Although concerns about lower propane supply levels were strong going into winter 2017-2018, Chowdhury pointed out factors that have slowed exports and increased propane production, and in turn reduced the risk for critical days of supply. As propane prices have traded at a higher percentage of crude oil for most of the early half of the winter, they have more recently created an interesting dynamic by moving to a lower percentage of crude, this despite the cold temperatures and strong domestic demand. IHS expects propane to trade at a lower percentage to crude oil as production increases over the next two years.

Crude oil production in the U.S. is expected to grow by an average of 1.1 MMbbld day to 10.4 MMbbld in 2018 and a further 800,000 bbld to 11.2 MMbbld in 2019. The Permian Basin in Texas will account for more than 70% of net annual average growth in 2018-2019, with Eagle Ford and Bakkan plays accounting for 12% and 8%, respectively.

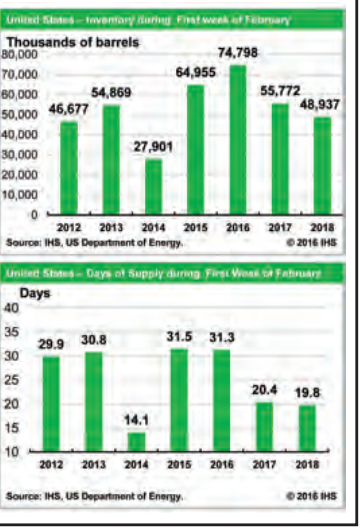
The expected growth in crude to 10.4 MMbbld will surpass the record level of 9.6 MMbbld set in 1970 and move U.S. supply above the output levels of Saudi Arabia and Russia. It should be noted that these two large producers do have the capacity to produce more, but are honoring agreed-to OPEC and non-OPEC production cuts through the end of 2018.

As U.S. crude oil production ramps up significantly, crude production in Venezuela is plummeting. Declining investment in producing fields and heavy oil upgrading units is having an impact as the Venezuelan economy collapses. Production there declined by more than 600,000 bbld to 1.75 MMbbld in fourth quarter 2017. IHS expects demand to decline by an additional 450,000 bbld in 2018 and 220,000 bbld in 2019.

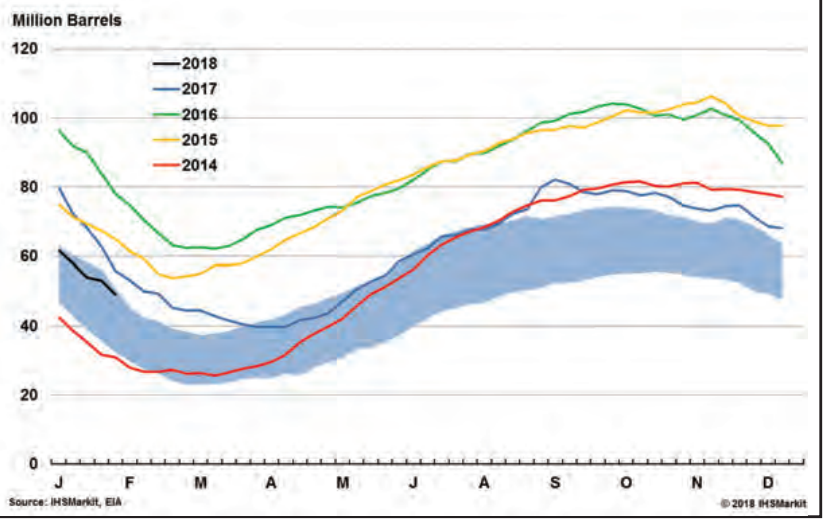
Propane prices in the U.S. are expected to decline to the 60-cent/gal. range during the second quarter as domestic demand slows and production ramps up. Looking toward next winter, while exports from the Gulf continue to be a significant factor to watch, expanded export capacity from the Mariner East 2 terminal on the East Coast is expected to move 60,000 to 80,000 bbld out of the U.S. This could create new challenges for the Northeast portion of the country, which is already the area farthest from most high concentrations of U.S. storage. The Northeast region is expected to add 20,000 to 30,000 bbld in new production. Meanwhile, U.S. propane will likely become more competitive with ethane as a feedstock for the chemical industry by winter 2018-2019.

WHERE INVENTORIES ARE TODAY

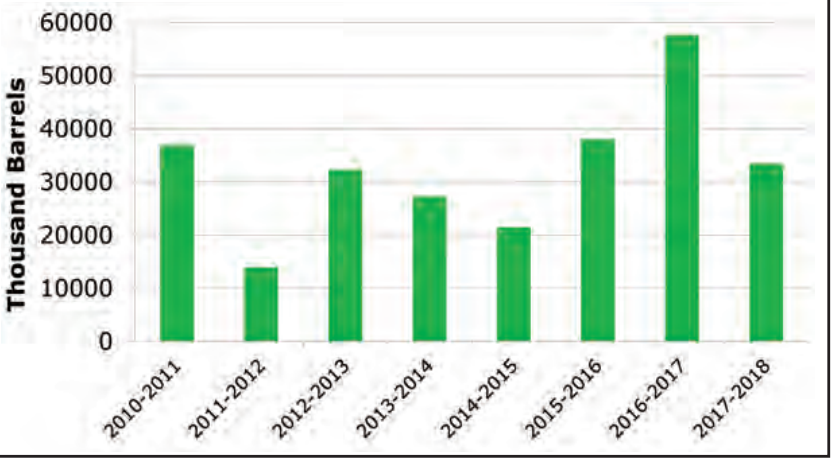
Week of February 2th	Inventory (thousand barrels)	Days of Supply
2012	46,677	29.9
2013	54,869	30.8
2014	27,901	14.1
2015	64,955	31.5
2016	74,798	31.3
2017	55,772	20.4
2018	48,937	19.8



TOTAL U.S. PROPANE WEEKLY PRIMARY INVENTORIES



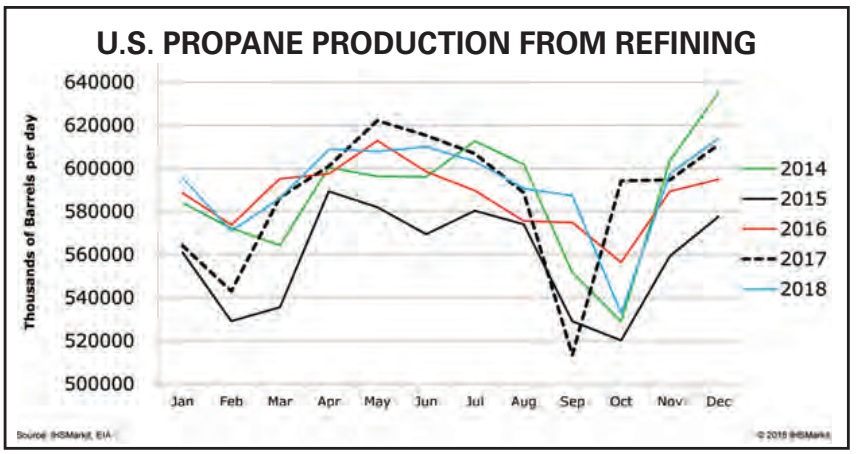
PROPANE DRAW FROM NOVEMBER TO MARCH

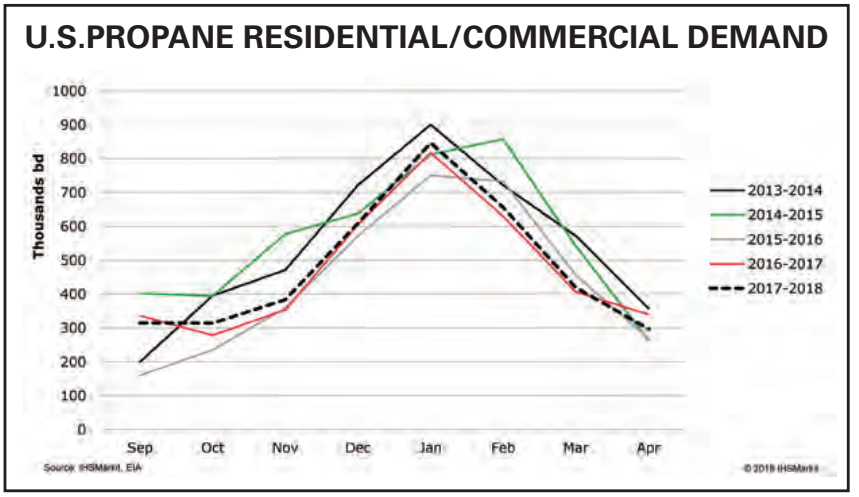


All graphics courtesy IHS Markit

2018-2020 NPGA Strategic Plan

A full day of meetings on February 12 commenced with discussion of the NPGA Strategic Plan 2018-2020. NPGA president and CEO Rick Roldan noted that through several revisions of the strategic plan in recent





years, the mission of NPGA has remained, "To advance safety and increase the use of propane through sound public policy." Successful organizations need to revise their strategic plan every few years to make sure they are on the right track with current organization needs, he added. "The plan will be most successful with a wide variety of stakeholders all playing a role in creating and implementing the new plan." In addition to using information gathered from in-depth interviews with 25 industry stakeholders, members of every membership type and level within the organization played a role in the strategic planning process. Four webinars were held during the run-up to the meetings in Santa Barbara to allow all NPGA members a chance to dive deeper into the strategic plan.

An outline of the strategic objectives includes:

I. Initiate an **Advocacy Outreach** Program to ensure that the environmental, economic, and energy security benefits of propane compared to other energy sources are understood by policymakers.

II. Create a **favorable business environment** for NPGA members through regulatory relief, policies that ensure reliable supply and distribution, and initiatives to promote workforce development.

III. Promote **industry cohesion** through coordination with industry organizations and collaborating with industries that have common objectives.

IV. Ensure **effective communications** with both external policymakers and internal industry stakeholders.

Roldan commented, "With an approach of 'electrify everything' driving many federal and state programs, it was a strong feeling among many that flawed policy initiatives are grounded in a lack of awareness or a misunderstanding of the benefits of the direct use of propane gas. A communications offensive directed at energy thought leaders will be initiated, and it is recognized that many who need to be reached are at the state level." NPGA will work to accelerate the application of Full Fuel Cycle (FFC) analysis—measuring energy usage through the full fuel cycle rather than only at the point of use. A study conducted by the Department of Energy and the National Academy of Sciences, published in 2005, was very favorable to propane and natural gas. Unfortunately, delay tactics by the electric utility association have stalled acceptance of full fuel cycle provisions.

Noting that President Trump's successful campaign was helped by his understanding that unnecessary federal regulations threaten job creation and impede economic growth, Roldan said NPGA needs to take advantage of a pro-business president and Congress while the window of opportunity exists. He stressed the importance of industry leaders or organizations communicating and working together, and he called for ongoing effective communication between industry stakeholders and external, as well as internal, policymakers. The board of directors adopted the new strategic plan the following day. —*Pat Thornton*



Phil Squair, NPGA's senior vice president of public and governmental affairs, addressed the association's strategic plan, which covers creating a favorable business environment.

Beyond the Mains

(Continued from p. 3)

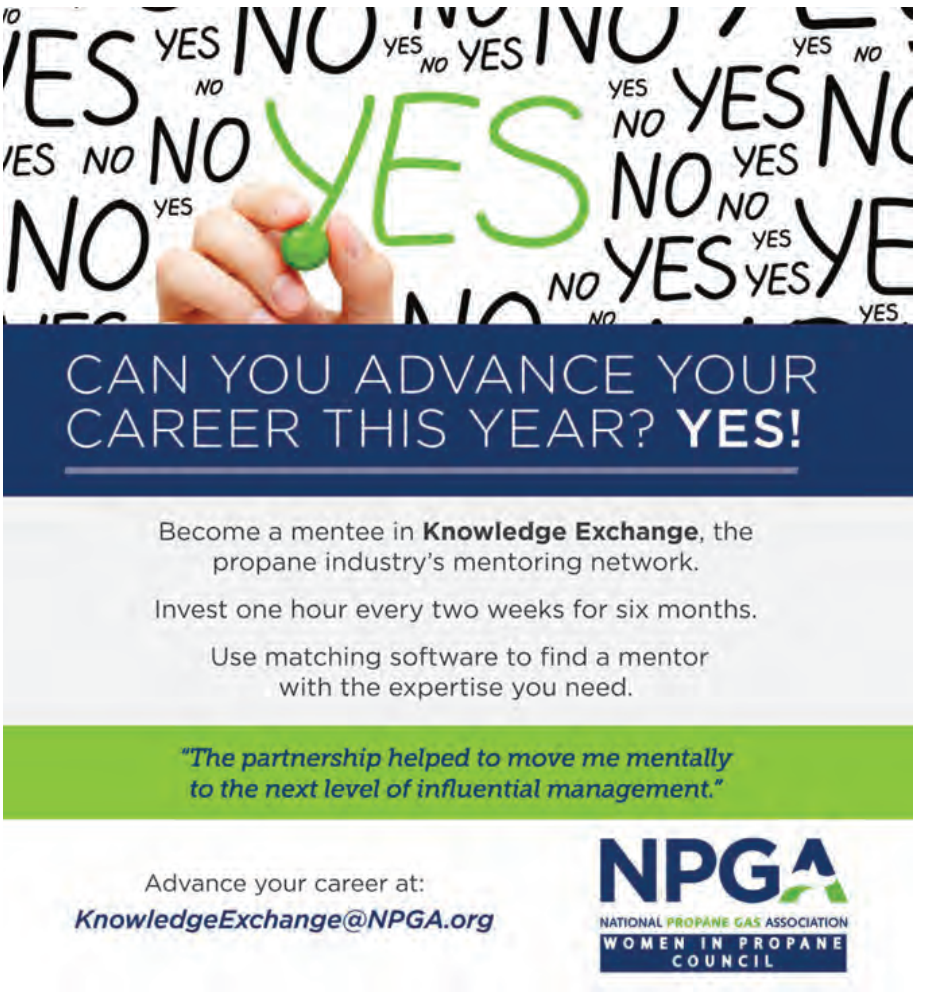
Rockall provided an update on the association's Cooking for Life campaign. He explained that each year, 4.3 million people die from cooking-related indoor air pollution—more than deaths from malaria, HIV/AIDS, and tuberculosis combined.

The three organizations each introduced major programs that have been developed to focus, and refocus, on specific needs of the industry and its associations and councils, and how to reach the goals therein. While PERC has its Pillars and Three-Year IT Plan, NPGA has once again updated its Strategic Plan, and WLPGA, during its Matrix Day public session, reviewed its focus for 2018, which is broken down into sub-sections that include: social media; extended digital media for defined integrated campaigns; enhanced communications tools; international media outlet outreach; reaching beyond traditional stakeholder groups; leveraging fellow associations; leveraging members; and realizing the potential of promoting LPG through the Forum. These were also integrated into the four larger segments of Communications, Market Development, Standards, and Technology and Innovation.

WLPGA's communications program, as discussed, features direct ties to PERC and PERC's marketing materials. A joint effort in an autogas roadmap calls for policymakers worldwide to join together to support the use of propane for vehicles. A similar initiative that was discussed was marine use. With the persistence of Capt. Bernardo Herzer, the world is recognizing that propane is far more versatile on the seas, and can benefit the ocean environment and marine life.

To round out the conversation, WLPGA is determining the best way to work with NPGA and PERC. The 2018 World LPG Forum is traveling to Houston, known as the Energy Capital of the World. With U.S. groups joining in, global propane will be well represented.







Gregg Walker described PERC's new Three-Year IT Plan, as well as the council's revised strategy to better serve marketers in partnership with NPGA and state associations.



Tucker Perkins outlined PERC's refocused programs as he spoke to World LPG Association members during that group's gathering in Santa Barbara.

PERC Pivots to Digitally Dominated, Regional Marketing Focus

As the Propane Education & Research Council (PERC) gathered in Santa Barbara, Calif. Feb. 14, agenda items focused on evolving marketing outreach strategies. PERC president and CEO Tucker Perkins' opening remarks underscored three pillars the council must always remain aware of:

- PERC serves the propane marketer
- PERC spends other people's money
- PERC can't do it alone

He emphasized the importance of providing tools that each retail propane marketer needs, cited the record sales of propane-fueled school buses as a success story, and said other propane applications will take off as well—supported by digitally dominated, regionally focused approaches. "This cost-effective, targeted approach will help us reach goals as we focus on unique advantages and opportunities in every region." He mentioned issues that have arisen with the propane catalog and said PERC will be making improvements, including helping marketers implement PERC materials into their marketing and communications plans.

In addition, Perkins observed that supply planning is a big piece of a marketer's role, and PERC can help. "Most marketers feel this winter has been cold enough, but not too cold," he said. "It's now half-time and more cold weather is likely on the way. April, May, and June are good months to talk seriously about what to do for the next year supply-wise."

The PERC CEO said he was particularly excited to announce plans for a marketing conference to take place July 30-31 in downtown Chicago. Touted as a "pro-growth, pro-marketing, can-do conference," about 300 marketers will be able to register on a first-come, first-served basis. The keynote address by Nilofer Merchant, a former tech executive and best-selling author, will emphasize innovation and collaboration. She is credited with being an expert at turning seemingly wild ideas into new realities and being able to show people how they can achieve results. Other presentations will be provided by industry stakeholders and marketing professionals during the day-and-a-half conference. "We'll only be talking about marketing," Perkins said. "We're going to talk about how companies can make an internal shift away from how they used to do things, strategies that may have been the right approach a generation ago are not going to continue to work well forever."

Prior to his introduction of James Rockall, CEO and managing director of the World LPG Association (WLPGA), Drew Combs, PERC chairman, noted that the World LPG Forum 2018 will be held in Houston this October in conjunction with National Propane Gas Association (NPGA) and PERC meetings. Rockall spoke to councilors and guests about the challenges that face the propane industry throughout the world. "The World LPG Association is in line with the concerns of PERC and NPGA that the 'electrify everything' movement is not good," he said. "Natural gas is our ally on this issue."

He highlighted the need for propane to replace dirtier fuels that cause many premature deaths in developing countries. WLPGA is pushing these nations to subsidize the implementation of propane for cooking stoves, and many already have. He drew attention to opportunities in the global automotive and maritime markets. "Fifty percent of demand for autogas is [only] in five countries," illustrating the tremendous potential for autogas in many other nations. "The biggest shipbuilder in the world is now starting to build ships that run on propane," he said, referring to the budding widespread interest in adopting propane as a marine bunker fuel to clean up vessel emissions.

With an emphasis on improved cooperation between PERC, NPGA, state associations, and propane marketers, PERC has held five of the eight regional meetings designed to gather feedback from industry members throughout the country on courses of action PERC should take. Bob Barry, chairman of the Industry Outreach Committee, said the meetings have been productive and that they will continue to be held after the first round of eight meetings is complete. A name change was approved, with the Market Outreach & Training Working Group becoming the Market Development & Outreach Working Group. Chairman Bruce Leonard said members felt the new name better reflects the purpose of the working group in developing new markets for propane.

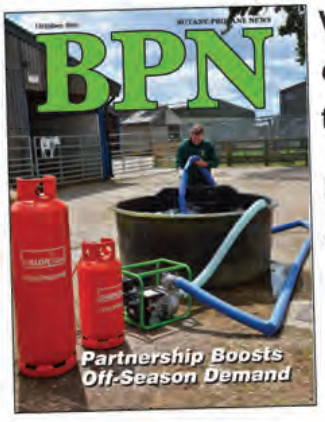
As PERC navigates a shift to a stronger focus on digital marketing, councilors were presented with details of the approach and the investment needed to meet goals. Mike Eason, senior vice president of administration and finance, reviewed the information technology infrastructure changes that will need to take place. "The architecture of our current system is old," he said. "We'll be moving to an open-source infrastructure where we have more competitive options."

The goal for 2018 is to maintain the stability of the IT infrastructure while planning for the switch, which will take place in 2019. By 2020, the system will be realigned to be more user-focused. Large co-located hardware and software will be phased out and replaced by cloud-based community solutions. The ultimate goal includes a more effective system for weekly updates on Friday, a more comprehensive social media strategy, a new and better Propane Marketer Resources Catalog, and state association websites for those states that wish to have a PERC-managed site.

Ingrid Bechard, director, market communications and Gregg Walker, director, external communications were joined by Josh Simpson, director of marketing at Kamps Propane (Manteca, Calif.), to discuss how programs will be implemented to better serve marketers in partnership with NPGA and state associations. "Some states will prefer to have their own website, and that is just fine," Perkins said, noting that many are more successful than others with communications. He acknowledged problems in the past with websites that have been managed by PERC. "They were cheap for the state associations, but cheap isn't always good," he said.

In further business, the council approved several funding requests, among them $299,543 for the 2017 U.S. sales of odorized propane survey and report; $485,420 for professional services and support; $99,675 for updating selected consumer safety and duty to warn materials; and $50,000 for 2017 Certified Employee Training Program (CETP) maintenance. Other approved requests included $65,000 for the CETP NFPA 58 update; $65,000 for the MEMA Education Foundation Propane Training Facility; and $275,000 for the Propane Construction Incentive Program. PERC will meet again in Atlanta April 5, just prior to the NPGA Southeastern Convention. —*Pat Thornton*

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Take Action, Support NPGA Advocacy Objective

The following is a grass-roots call-to-action advocacy letter to the industry by National Propane Gas Association board chairman Jerry Brick and NPGA governmental affairs chairman Thomas Jaenicke:

Dear Propane Industry Members,

By now you probably have heard of NPGA' top advocacy objective of 2018: an exemption from the Occupational Safety and Health Administration's (OSHA) Crane and Derricks in Construction Rule, or Crane Rule. With a compliance deadline of Nov. 10, the Crane Rule will require every propane employee to become third-party certified in order to operate a truck crane for propane tank deliveries and retrievals. This regulation is expected to cost the industry more than $150 million every five years.

So far, the industry has heeded NPGA's call to action. As of Feb. 15, more than 1300 letters from industry employees have reached 263 congressional offices, including 172 representatives and 91 senators. If you have not yet done so, go to **Take Action** at *www.npga.org* to contact your members of Congress now.

Our industry means business; from coast to coast, we will take action on policies we consider unfair. We must show Congress—not only send letters—how unfair the Crane Rule is to the propane industry. Congressional staffers frequently see tower cranes when they picture cranes used in the propane industry. In fact, a tower crane is located in the middle of the House of Representatives office complex, where a multiyear renovation project is currently underway. But most folks on Capitol Hill have never heard of a knuckle boom crane, much less seen one. It's too easy for congressional staff to mistakenly confuse our industry's cranes with tower cranes used to construct skyscrapers.

The best way to educate Capitol Hill is to invite those who serve in Congress and their staff to visit a propane facility. Visiting a propane facility is our opportunity to show our simple use of truck cranes, and it's an opportunity for members of Congress to connect with their voters. After facility tours last year, nine members of Congress eagerly joined others in sending OSHA a letter about the Crane Rule. Seeing is believing!

NPGA can help organize a congressional visit—from the invitation to issue briefs. If you are willing to host a congressional visit at your facility, please contact Peter Ferrell at NPGA—*pferrell@npga.org*.

Jerry Brick
Chairman of the Board, NPGA
North Star Energy, Aberdeen, S.D.

Thomas Jaenicke
Chairman, NPGA Governmental Affairs Committee
ATomiK Creative Solutions, Charlevoix, Mich.







BRIAN DAVIDSON



BOB PAUL

RegO

RegO (Elon, N.C.) has made a change in its global sales leadership with the appointment of **Bob Paul** as RegO's vice president of sales. He succeeds **Brian Davidson**, senior vice president of sales, who is retiring after 35 years with RegO. Paul is an industry veteran with 30 years of sales experience in flow control products. He was previously with Circor Energy (Houston), where he served as global director for sales for the company's distributed valve division. In his new position, he will coordinate both domestic and global sales efforts in support of RegO's growth initiatives.

Throughout his career, Davidson has held numerous sales, marketing, general management, and executive roles, contributing to RegO's ongoing sales growth. To assist in the leadership transition, he will continue in a part-time consulting capacity through 2018. In addition, Davidson will continue to remain active on the NPGA board of directors and will attend major industry events on behalf of RegO.

The **Missouri Propane Education and Research Council** (MOPERC) recently installed its directors and officers, who were approved at the group's fall meeting. **Roger Hoff** of Hoff Brothers LP-Gas (Perryville) will serve as chair; **Luke Fitzpatrick**, MFA Oil (Jefferson City), vice chair; and **Nick Goodrich**, Goodrich Gas (Crocker), treasurer.

Five incoming directors were appointed or reappointed to three-year terms. Those reappointed were **Luke Fitzpatrick** of MFA Oil (Jefferson City); **Marty Lerum**, Propane Resources (Mission, Kan.); and **David Young**, Gas Equipment Co. (Highland, Ill.). **Kevin Pearson**, Ferrellgas (Nixa), and **Wayne Terpstra**, Custom Tank and Equipment (Kansas City), are the newly-appointed directors.

Outgoing directors recognized for their service to MOPERC include chairman **Eric Kolkmeyer**, Energy Transportation Systems (Bates City), and **Randy Warner**, Ferrellgas (Liberty).

Rounding out the council roster for 2018 are: **John Brokes**, Big River Propane (Hannibal); **John Fling**, Ferrellgas-GASCO (Eldon); **James Greer**, MFA Oil (Columba); **Charlie Neidert**, Al's Gas (Neosho); **Derek Poe**, Titan Propane (Branson); **Mark Porth**, CHS (Lawson); **Jeff Reitz**, Central States Bus (Fenton); and **Aubrey Salley**, Salley's Propane (Bates City). **Steve Ahrens** serves as MOPERC president.

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BPN's Propane Industry Calendar

For up-to-the-minute meeting and convention information, use the telephone number listed, or additional listings can be found at www.bpnews.com

2018

March 4-6—National Propane Gas Association Spring TS&S Committee Meeting, Hilton Savannah DeSoto, Savannah, Ga. (202) 355-1335

March 5-7—Energy Utility & Environment Conference, San Diego Convention Center, San Diego, Calif. *info@euec.com*

March 6-9—The Work Truck Show 2018, Indiana Convention Center, Indianapolis. (800) 441-6832

March 7-8—LPG Europe Summit, SANA Metropolitan Hotel, Lisbon, Portugal. *mkielerska@acieu.net*

March 8-10—HPBA Expo 2018, Music City Center, Nashville, Tenn. (703) 522-0086, ext. 113

March 13-15—M-PACT Show, Indiana Convention Center, Indianapolis. (217) 241-0507

March 14-15—Pennsylvania Manufactured Housing Association Annual Meeting, Holiday Inn Harrisburg, Hershey. (888) 242-7642

March 20-21—16th Annual Canadian School of Hydrocarbon Measurement, Calgary TELUS Convention Centre, Calgary. *info@cshm.ca*

March 27-28—New York Propane Gas Association Spring Conference & Annual Meeting, The Desmond Hotel, Albany. (518) 383-3823

April 5—Propane Education & Research Council Meeting, Omni Hotel at CNN Center, Atlanta. (202) 452-8975

April 6—Women in Propane Council Leadership Forum, Georgia World Congress Center, Atlanta. *wip@npga.org*

April 6-8—National Propane Gas Association Southeastern Convention & International Propane Expo, Georgia World Congress Center, Atlanta. (202) 466-7200

April 10-13—IHS International LPG Seminar & Workshops, Royal Sonesta Houston Galleria, Houston. (800) 447-2273

April 15-18—GPA Midstream Convention, Austin Marriott, Austin, Texas. (918) 493-3872

April 24-26—Manufactured Housing Institute 2018 National Congress & Expo, Paris Hotel, Las Vegas. *info@mfghome.org*

April 26—WLPGA Middle East Regional Summit, Four Seasons Hotel, Beirut. *mkelly@wlpga.org*

April 26-27—National Propane Gas Association Benchmarking Council Meeting (Groups A-F), Wyndham Bayside, San Diego, Calif. (916) 531-2231

April 30-May 3—ACT Expo 2018, Long Beach Convention Center, Long Beach, Calif. (888) 993-0302

May 3-4—National Propane Gas Association Benchmarking Council Meeting (Groups H-M), Wyndham Bayside, San Diego, Calif. (916) 531-2231

May 10-11—PERC Advisory Committee Meeting, Marriott St Louis Grand, St Louis. (202) 452-8975

May 14-15—Vermont Fuel Dealers Association Conference, Killington Grand Resort, Killington. (802) 223-7750

May 15-17—International School of Hydrocarbon Measurement, Cox Convention Center, Oklahoma City, Okla. (405) 831-8609

May 16-18—Western Propane Trade Show & Convention, Silver Legacy Hotel & Reno Events Center, Reno, Nev. (916) 447-9742

May 17—Women in Propane Leadership Seminar, Silver Legacy Hotel/ Reno Events Center, Reno, Nev. *wip@npga.org.*

May 20-23—Eastern Energy Expo, Foxwoods Resort Casino, Mashantucket, Conn. (973) 467-1400

May 23—Michigan Propane Gas Association Propane Safety Awareness Day, State Capital Lawn, Lansing. (517) 487-2021

May 29-31—East Africa 2018 Oil & Gas Expo, KICC, Nairobi, Kenya. *feedback@expogr.com*

May 31-June 1—AEGPL Congress, Grimaldi Forum, Monaco. *info@aegpl2018.com*

June 3-6—2018 Presidential Summit, Mid Year Board of Directors Meeting and Propane Days, Renaissance, Washington, D.C. (202) 466-7200

June 5-7—LPG Myanmar 2018, Sedona Hotel, Yangon, Myanmar. *info@gasacademy.com.sg*

June 6-7—Canadian Propane Association Leadership Summit & Golf Tournament, Brookstreet Hotel, Ottawa, Ont. *info@propane.ca*

June 11-14—2018 Mid-States Show, Branson Hilton Convention Center, Branson, Mo. (800) 601-9332

June 11-14—NFPA Conference & Expo, Mandalay Bay Convention Center, Las Vegas, Nev. (800) 344-3555

June 13-15—Global Petroleum Show, Stampede Park, Calgary. (888) 799-2545

June 18-21—North Central Convention & Trade Show, La Crosse Center, La Crosse, Wis. *dgrooms@iapropane.org*

June 20-22—2018 Tri-State Meeting, Sands Casino Resort, Bethlehem, Pa. (717) 441-6040

June 26-28—Colorado-New Mexico Convention, Courtyard By Marriott & Pueblo Convention Center, Pueblo, Colo. (303) 424-0870

June 27-28—North Dakota Propane Gas Association Meeting & Convention, Rough Rider Hotel, Medora. (701) 223-3370

July 11-12—Propane Education & Research Council Meeting, location tba, Minneapolis. (202) 452-8975

July 14-18—Virginia Propane Gas Association Annual Meeting, Hilton Virginia Beach Oceanfront Hotel, Virginia Beach. (866) 881-6309

July 18-20—Pacific Propane Gas Association Conference, The Hotel Alyeska, Girdwood, Alaska. *ppga@kdafirm.com*

July 26-29—Florida Propane Gas Association Annual Convention, Sheraton Sand Key Resort, Clearwater Beach. (850) 681-0496

Aug. 4-6—Crossroads Propane Expo & Conference, FW Convention Center, Fort Worth, Texas. *info@txpropane.com*

Aug. 8- 9—Northeast Propane Show, DCU Center, Worcester, Mass. *Caryn@pgane.org*

Aug. 12-15—South Carolina/Georgia Southern Connection Convention, The King & Prince and Golf Resort, St. Simons Island, Ga. (803) 865-2284

Sept. 5-7—Nevada Propane Dealers Association Annual Conference, Harvey's Resort & Casino and Edgewood Country Club, South Lake Tahoe, Nev. *nvpropane@gmail.com*

Sept. 9-11—2018 Fall TS&S Committee Meeting, Crown Plaza Indianapolis, Indianapolis. (202) 355-1355

Sept. 13-14—National Propane Gas Association Benchmarking Council Meeting (Groups A-H), Embassy Suites, Baltimore. (202) 466-7200 ext. 335.

Sept. 17-20—Gastech Exhibition & Conference, Fira Gran Via, Barcelona. *info@gastechevent.com*

Sept. 20-21—National Propane Gas Association Benchmarking Council Meeting (Groups I-M), Embassy Suites, Baltimore. (202) 466-7200 ext. 335

Sept. 23-25—Manufactured Housing Institute 2018 Annual Meeting, Pasea Hotel & Spa, Huntington Beach, Calif. *info@mfghome.org*

Sept. 30-Oct. 2—National Propane Gas Association Board of Directors Meeting, The Four Seasons Downtown, Houston. (202) 355-1335

Oct. 2-4—31st World LPG Forum, Hilton Americas Houston, Houston. *eassous@wlpga.org*

Oct. 3-4—ACI's Bulk Liquid Storage Conference, location tba, Cartegena, Spain. *cwilliams@acieu.net*

Oct. 17-19—World Engineering Congress 2018 Conference and Expo, Charlotte Convention Center, Charlotte, N.C. (770) 447-5083 ext. 226

Oct. 24-26—Pacific Propane Gas Association Conference, Eagle Crest Resort, Redmond, Ore. *ppga@kdafirm.com*

Nov. 8-9—Propane Education & Research Council Meeting, location tba, Savannah, Ga. (202) 452-8975

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Trucking in Winter

(Continued from p. 31)

younger Papiano joined his father's company in 1998 and worked there until the enterprise was sold in 2011.

"I have started my own company based on customer service and being able to provide that family-owned business experience," he says. "I started last year with four units and am already up to 40. The propane industry is unlike any other, where a handshake still means something and service is not forgotten. I have two sons who I hope one day will take over what I am carrying over, the legacy of Papco in the Northeast."

He also characterizes this winter as colder and sometimes challenging, with refinery downtime and pipeline allocation in play. However, pulling from Schaefferstown and Marcus Hook, Pa. was not a problem. His trucks did not have to travel farther to Chesapeake, enabling multiple loads to be delivered daily. At press time, demand had slowed as rail deliveries and marketers caught up, he says. "The one thing about this industry is that no customer has a crystal ball. Weather is the key factor and it can't always be predicted, so the best thing I can provide is customer service, a legacy I'm carrying over from my father."

The C Three owner comments that he was fortunate to work at a large corporation after his dad sold Papco, which afforded him the opportunity to become steeped in business operations, yet he wanted to operate on his own, as his father had. "Corporate America has a lot to offer, but in our business customers need a person to say something is going to happen, then it does. That is what I am going to bring to the market in the Northeast. I watched my father grow to over 300 units, and with the support of customers pushing me along I have no doubt I will soon be back at that number."

The married father of three young children notes that even if independents put their own transport units into service, what works in the summer doesn't always pan out as well in winter. "Common carriers are needed to fill the gaps. I'm fortunate to be able to haul for anybody. Others can't offer that." The New Jersey Propane Gas Association member adds that, like his dad's Papco operation, drivers at C Three don't get pink slips at the end of the heating season. "We're fortunate to work with other companies, such as delivering cylinders. We're also a butane carrier and we haul propylene."

And what transportation company owner can resist bragging about his trucks. "I went with the [model] 389 Peterbilt, which is a very eye-catching unit that customers appreciate when they have a clean asset pulling into their yard. One hundred percent have electronic logs and we also run dash cameras in all our units."

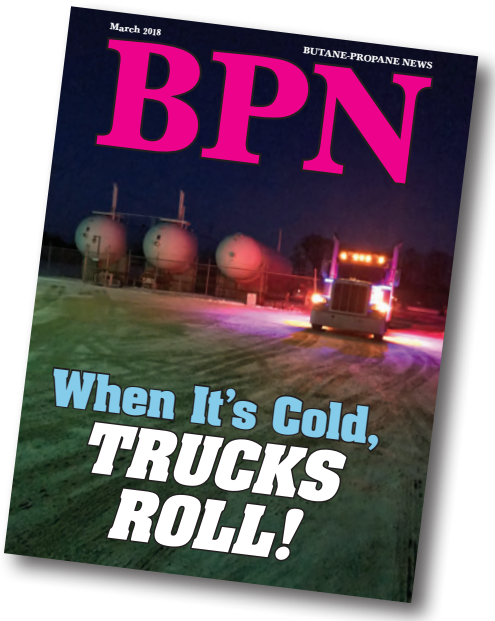
—John Needham



Henry Papiano hopes his sons, Riley, left, and Henry Papiano Jr. will carry on the family legacy. Their grandfather, the elder Henry Papiano, founded Papco LLC.

Reader's Service Page

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A Journey Through the Glass Ceiling

Women in Propane

Elaine Bittner, senior vice president of strategic development for Chesapeake Utilities Corp. (Dover, Del.), recently received a wonderful thank you note along with a necklace made of broken glass representing the glass ceiling. The gift signifies the incredible accomplishments she has made, particularly for a woman in a male-dominated industry who was told in high school "women don't make good engineers."

"That was a transformative moment for me. I thought, 'I can and I will.' That started me on a path to make decisions to go and create opportunities." Bittner passes this message on to others: "Believe in yourself, and have people around you who believe in you."

After graduating from the University of Maryland, she began her career as a chemical and environmental engineer with Chesapeake Utilities in 1996, successfully managing federal environmental Superfund projects.

"I had my heart set on saving the environment, and I still do, and I was fortunate to have someone [at Chesapeake] who saw something in me." Thus began a remarkable journey through the company, moving from the environmental roles to the natural gas distribution group, to the pipeline group (where she eventually ran the company's interstate transmission pipeline subsidiary), to the regulatory side, then unregulated energy, to energy marketing and trading, and eventually to COO for Sharp Energy, the propane side of the company. She was also called upon to identify and develop a team to lead the company's acquisition of Gatherco in 2015.

"Chesapeake Utilities Corp. is a wonderful company," Bittner says. "I've had many opportunities to grow; many times they felt risky because I would be placed in areas where the challenges were the biggest. I was always willing to learn and take on new challenges."

Today, as chief strategy officer for all seven of Chesapeake's business units, she leads the vision, coordination, and execution of strategic planning and business development; new business opportunities; mergers and acquisitions; corporate communications; and the project management office. In addition, she holds leadership roles for several of the company's business subsidiaries. She is president and COO for Aspire Energy; and COO for Sharp Energy Inc. and Peninsula Energy Services Co. For a decade, she also worked in the pipeline company and served as vice president of Eastern Shore Natural Gas Co.

"When I look back on my career, things I did early on had clear connection points that were put to good use down the road," explaining these points were building blocks that built on one another.



Her career accomplishments have led to other accolades. In 2016, Bittner was named "Female Executive of the Year" by the Stevie Awards for Women in Business. In 2017, she was recognized among the "Top 50 Most Powerful Women in Oil and Gas" by the National Diversity Council, and last year, she was honored as one of Delaware's extraordinary woman leaders in *Delaware Today* magazine's "Women in Business."

Being open to new opportunities because you never know where they are going to lead, and not to be afraid to challenge the status quo are two of her biggest themes. Another, is giving back.

As the keynote speaker for the Greater Philadelphia Women's Energy Network annual meeting last year, she quoted First Lady Michelle Obama: "*When you've worked hard, and done well, and walked through that doorway of opportunity, you do not slam it shut behind you. You reach back, and you give other folks the same chances that helped you succeed.*"

One of her main passions now is helping the community and other women. She is involved in several organizations, but primarily with the local United Way, local food banks, and the American Heart Association. In fact, Bittner received the Heart Association's "Passion and Leadership" award in 2015 for her leadership as chair of the Delaware American Heart Association's annual Southern Delaware "Go Red for Women" luncheon. Her record-breaking fundraising efforts were nationally recognized by the association. She is also committed to STEM and is looking forward to helping the Heart Association launch a STEM (science, technology, engineering, and mathematics) program. As a board member and first vice president of the Maryland-District of Columbia Utilities Association, she collaborates with other industry leaders to promote and identify enhancements for the energy industry.

"It's a phenomenal feeling to see people reach and go beyond their potential," she said. "When other women tell me they want to be like me, I tell them to go further, and be better."

For some accomplished business women, success may come at a price, but Bittner has figured out the challenges of managing a work/life balance. Her two teenage daughters, Grace and Marcelina (at left), remind her to have fun, she said. "They're my inspiration to work harder, but also to play harder. Young girls have a tremendous amount of courage. They expect to have careers and opportunities. I'm hopeful and optimistic that our younger female generations, including my daughters, will have even greater opportunities."

—*Karen Massman VanAsdale*

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