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& PRODUCT SHOWCASE

Reeling in Successful Fleet Operations

Reel maintenance, route optimization & engine innovations are the name of the game in propane service & delivery



NPGA's Steve Kaminski on Where NY Gas Bans Stand in Court

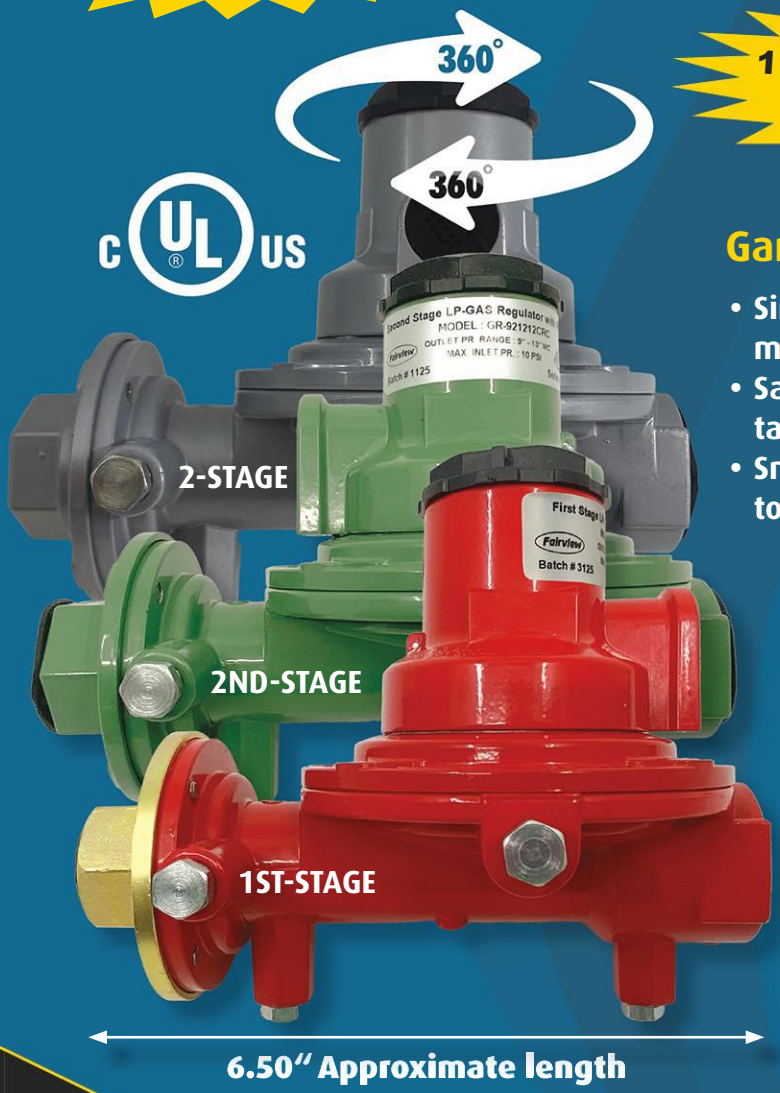
Propane Supply: Impacts of Global Conflict + What to Expect Next Winter

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Dear Readers,
In late January, I received a letter to the editor in response to our December 2025 Beyond the Mains article, "New York Gains 'Big Win' Over Propane Ban Following NYPGA's Fall Conference." I'd like to share that with you here:

"As New York state considers revisiting a fossil fuel ban for new construction, I feel compelled to share a local perspective — one rooted in real experience. I've been part of this community for more than 40 years, and I've worked in the propane and energy sector for over 20. This isn't abstract policy to me; it's personal, and it's local.

"This issue goes far beyond energy headlines. It directly affects plumbers, HVAC technicians, electricians, builders, project managers and small business owners — the skilled tradespeople our communities depend on every day. These are the folks you call on a Saturday night or early Monday morning. They know your systems, your properties and, often, your families. They show up when it matters most.

"In many parts of New York, reliable electric service is still not guaranteed. That reality is why so many homes and businesses rely on LP-powered generators to stay safe and operational during outages. I have a family member who works directly on the electric grid, regularly logging 50-80 hours a week repairing lines damaged by storms, tree growth and aging infrastructure. The challenges are real and ongoing.

"If we move forward without considering these realities, we risk more than losing a safe and efficient energy option. We risk weakening the fabric of our small communities. Removing fuel choice doesn't just limit options — it threatens local services and the family-run businesses that keep our towns running and our neighbors employed.

"[The New York Propane Gas Association] does an outstanding job sharing facts and educating communities, and I encourage anyone with questions or concerns to reach out and learn more.

Sincerely,
Michael Maley"

Thank you, Michael, for showing how gas bans affect not just policy, but also the people who are on the front lines of providing essential services to the public. There is so much more on the line than we may realize. To follow up on the current state of the bans in court, we spoke with National Propane Gas Association (NPGA) President and CEO Steve Kaminski on the recent oral arguments before the U.S. Court of Appeals, which you can read about on page 26.

Speaking of NPGA, check out pages 54-59 for our pre-show coverage for the 2026 Southeastern & International Propane Expo, as well as pages 60-79 for a robust product showcase covering products and services you can find on the show floor in Nashville, Tennessee, this year. Don't forget to stop by to see BPN at booth #714 — looking forward to chatting with you!

Until next time,

Jessica L. Phillips

JESSICA GRAHAM PHILLIPS
Editor-in-Chief

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VOLUME 58 ISSUE 4

AMERICAN STANDARD
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April 2026



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On the Cover
Reel maintenance — including testing how the hose unwinds and retracts — is a key component of a thriving propane delivery service. (Image courtesy of Hannay Reels.)

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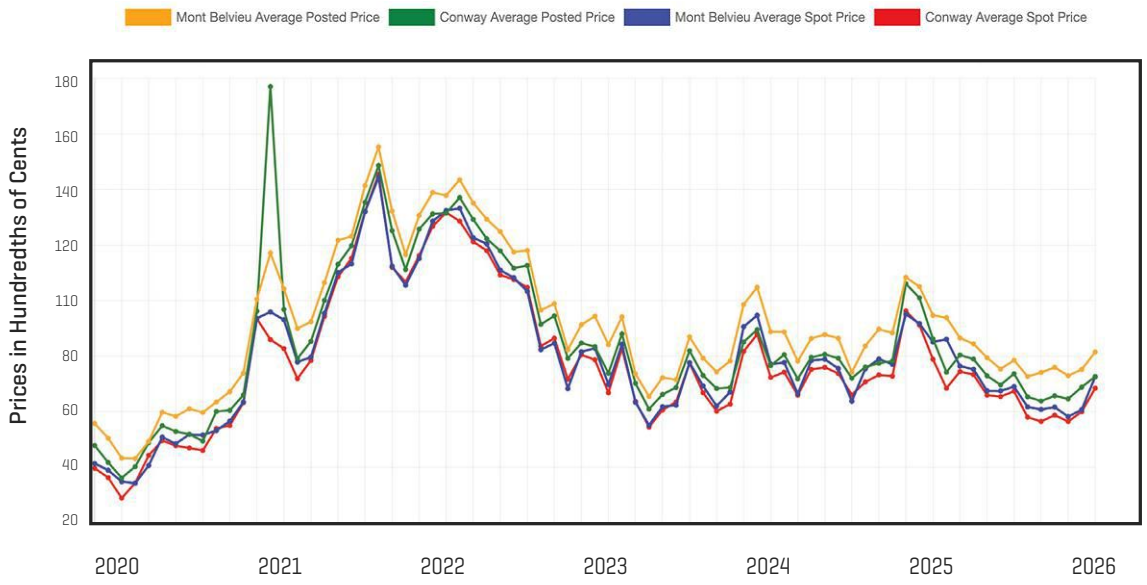
It was a pleasure connecting with you during Expo and Convention. We deeply value your support and friendship, and we look forward to strengthening our trusted partnership in the years ahead.



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MONT BELVIEU & CONWAY AVERAGE THURSDAY PROPANE PRICES



at a glance During the latest mid-month period, prices at Mont Belvieu, Texas, increased. The posted prices increased 6.25 cents/gal, from February mid-month to March mid-month, and spot prices increased 8.5 cents over the month. Conway, Kansas, postings increased 3.815 cents/gal and spots increased 8.5 cents over the month.

MID-WEEK AVERAGE POSTED/SPOT PROPANE PRICES (Cents per Gallon)

	02/12/26	02/19/26	02/26/26	03/05/26	03/12/26
Mont Belvieu					
posted	75.250	73.875	73.000	78.625	81.500
spot	60.500 – 61.000	60.500 – 60.750	61.000 – 62.125	69.250 – 70.500	71.500 – 73.750
Conway					
posted	68.870	65.995	64.745	71.745	72.685
spot	59.500 – 60.500	59.375 – 60.000	58.000 – 59.500	67.500 – 69.000	68.000 – 69.000

at a glance Canada's primary underground propane inventories decreased by 33.3% in February, according to the Canada Energy Regulator (CER). The total represented a month-to-month decrease of 430.8 Mcm. Compared to a year earlier, stocks were higher, with 141.1 Mcm, or 19.6%, more product on hand. *(Editor's Note: Due to BPN's publishing schedule, February inventory data is the latest available from the CER.)*

CANADIAN INVENTORIES (Thousand Cubic Meters)

PROPANE	Feb 2026	Jan 2026	Change	Feb 2025
Propane-East	284	453.9	-37.4%	216.1
Propane-West	578.4	839.3	-31.1%	505.2
Total Propane	862.4	1293.2	-33.3%	721.3
BUTANE				
Butane-East	185.5	235.2	-21.1%	241.6
Butane-West	436.6	432.9	0.9%	264.3
Total Butane	622	668.1	-6.9%	505.9

Source: Canada Energy Regulator

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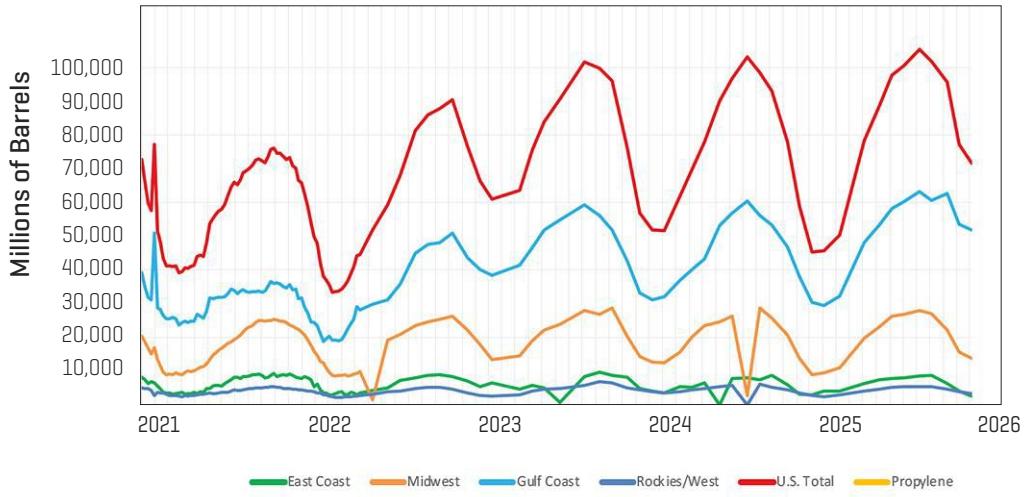
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U.S. PROPANE INVENTORIES



at a glance

United States propane stocks experienced a 5.594 MMbbl decrease from February to March. East Coast stocks decreased 1.418 MMbbl, the Midwest decreased 1.95 MMbbl, the Gulf Coast decreased 1.782 MMbbl, and the Rocky Mountain/West Coast decreased 444,000 bbl. Compared to the same time in March 2025, the March 2026 stocks were 26.416 MMbbl higher.

U.S. PROPANE INVENTORIES

Feb. 6 – March 6, 2026, and One Year Ago (Thousand Barrels)

	02/06/26	02/13/26	02/20/26	02/27/26	03/06/26	03/07/25
East Coast	4.100	3.694	3.292	3.530	2.682	3.083
Midwest	15.702	15.174	13.915	13.806	13.752	9.041
Gulf Coast	53.557	51.750	51.785	52.600	51.775	30.395
Rocky Mtn & West Coast	3.910	3.566	3.540	3.415	3.466	2.740
U.S.	77.269	74.185	72.532	73.351	71.675	45.259

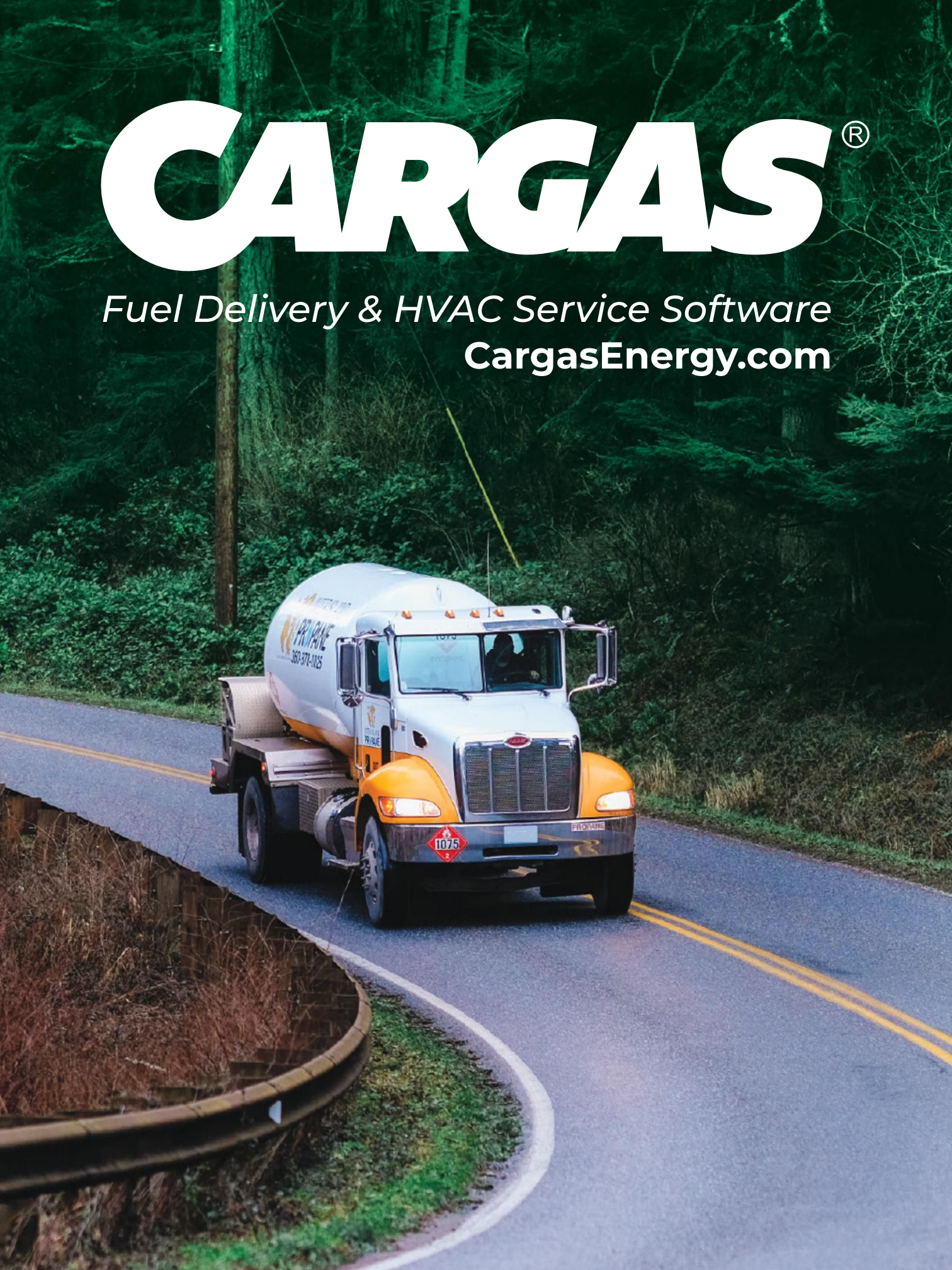
U.S. RESIDENTIAL PROPANE PRICES

(Mid-Month, Cents per Gallon)

	Feb 2026	March 2026	March 2025
East Coast (PADD 1)	349.9	357.1	361.7
Midwest (PADD 2)	221.3	218.4	223.4
Average U.S.	266.0	266.4	273.3

Source: "Weekly Heating Oil and Propane Prices," Energy Information Administration

Find out more:
For commentary on mid-month prices and Canadian inventories, visit bpnews.com/news.


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EDP ACQUIRES HOCON GAS

EDP acquired Hocon Gas, a Connecticut-based provider of propane, fuel oil and related services. Hocon Gas operates from five locations within Connecticut, serving more than 35,000 customers throughout the state. Hocon Gas was founded more than 75 years ago by Mike Gable and his wife, Lauree, beginning with a single location in Norwalk, Connecticut. In 1980, leadership of the company transitioned to their son, David Gable, who significantly expanded the business through the addition of four locations. Gable has been an active participant in national and regional propane industry associations for many years. Gable commented, "I have known EDP's senior leadership for many years and have consistently believed that their business model and reputation would make them the ideal steward of Hocon Gas. I am confident that EDP will continue to support our employees and customers and am very pleased with this outcome."

CONFLICT IN IRAN IS IMPACTING GLOBAL OIL SUPPLY

On Feb. 28, U.S.-Israel forces conducted strikes on Iran, killing Iran's Supreme Leader Ali Khamenei, as well as nearly 200 people, many of them children at a school in southern Iran. Iran has retaliated by carrying out attacks on Israel and surrounding Middle Eastern countries that host U.S. military bases. In a recent NPR interview, journalists explored the potential impact of the escalated conflict on global oil supply and gas prices. "Iran is a major oil exporter to China, even despite U.S. sanctions," said NPR journalist Julia Simon. "But that's not the biggest worry here. The real worry for global oil markets is about where all this fighting is taking place. The Strait of Hormuz — it's this key shipping route. To get to foreign markets, those exports go through the Strait of Hormuz. About 20% of global oil and oil products go through that strait normally." Traffic through the Strait of Hormuz has been impacted by the increased uncertainty and violence in the area, with some oil transport ships reporting attacks between March 1 and March 4. This is in keeping with a statement from an Iranian Revolutionary Guards official to attack any ships crossing the strait, a threat that has been made for years by the Iranian government in the event of an attack on the Islamic Republic. Saudi Arabia, a key U.S. ally in the region, is the world's largest oil exporter, with 7.2 million barrels per day passing through the Strait of Hormuz.

RINNAI AMERICA CORPORATION APPOINTS VP OF INNOVATION



Joseph Gresham

Rinnai America Corporation, a North American manufacturer of energy-efficient tankless water heaters, welcomed Joseph Gresham to Rinnai America as vice president of innovation and a member of the company's executive leadership team. In this role, Gresham will lead Rinnai America's Innovation organization, providing strategic direction for innovation, product strategy and technology advancement across North America. Gresham is a global product development executive with experience across HVAC, residential appliances, drinking water systems and food service equipment. He has held leadership roles at Middleby Corporation, Elkay (now Zurn Elkay Water Solutions), Whirlpool and Ingersoll Rand (now Trane Technologies), where he strengthened product strategies and built high-performing global teams that helped drive growth and improve competitive position.

AMERICAN STANDARD MANUFACTURING REMEMBERS COLEMAN VICKARY



Coleman Vickary

Coleman Vickary, founder of American Standard Manufacturing, passed away on March 2 at Kingsway Arms Nursing Center in Schenectady, New York. He was 79. Coleman had been battling Lewy body dementia before his passing. He was born Dec. 19, 1946, in Amsterdam, New York, and was a 1964 graduate of Canajoharie High School and attended Monmouth College. As the founder and the original owner/operator of American Standard Manufacturing, Coleman supported the propane industry for over 35 years, and his company was and is a key supplier that helped launch the cylinder exchange business. He initially started American Standard Manufacturing in Cobleskill, New York, and eventually moved to its current location in Central Bridge, New York. Coleman was also a participant in the startup of the National Propane Gas Association's Cylinder Exchange Council. Coleman is survived by his wife, Connie Vickary; his two children, Regina Haig and Dominic Vickary; three grandchildren; and five great-grandchildren. Regina and Dominic continue to operate American Standard Manufacturing today. In his obituary, Coleman is described as "an entrepreneur and inventor, focused on creating a legacy for his family. … He found daily joys in working with his hands and spending time with his family, boating or playing golf. As a man of many talents, he excelled in blacksmithing, woodworking, engineering, photography and giving advice when asked."

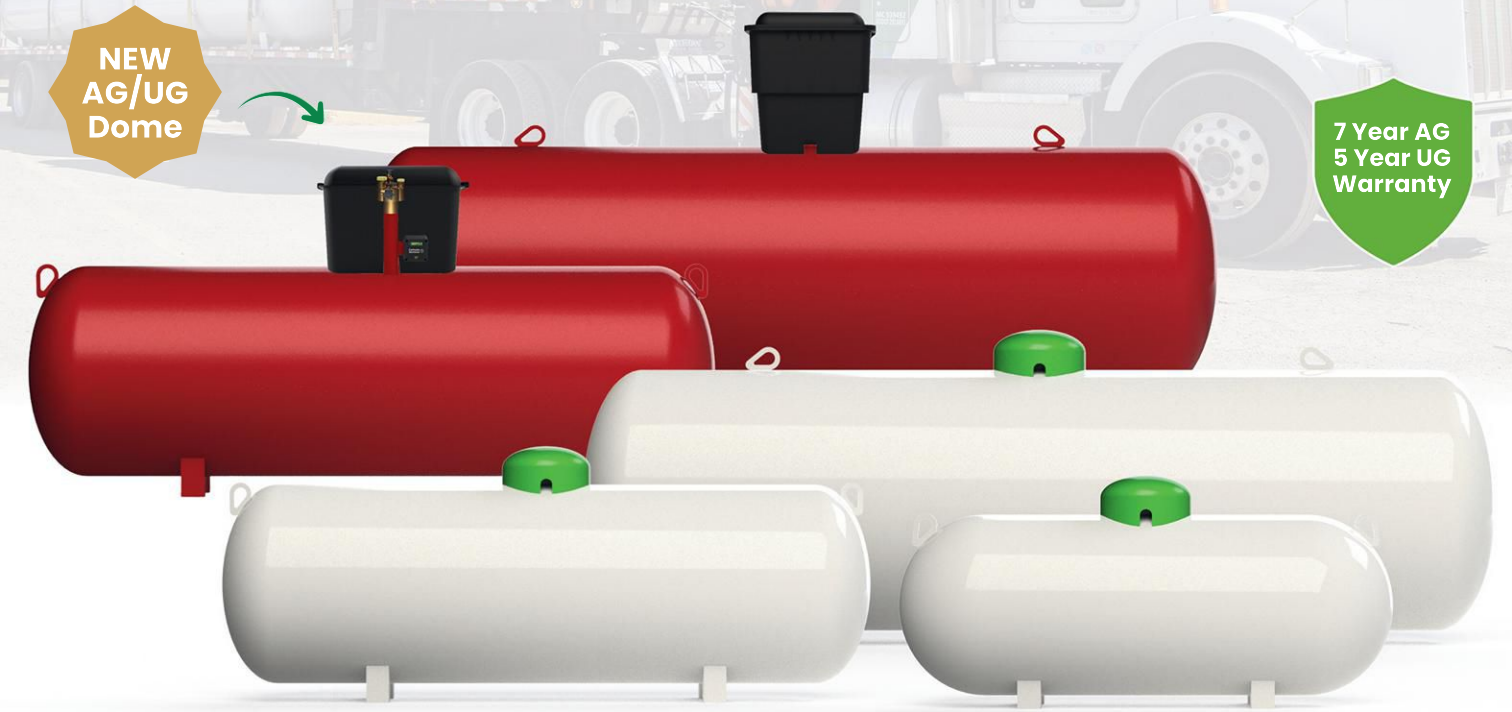
MID-MONTH TO MID-MONTH: MARCH PRICES UP FROM FEBRUARY

During the latest mid-month period, prices at Mont Belvieu, Texas, increased. The posted prices increased 6.25 cents/gal from February mid-month to March mid-month, while the spot prices increased 11 cents. Conway, Kansas, postings increased 3.815 cents/gal, and spots increased 8.5 cents over the month. The Mont Belvieu mid-February posted price was 75.25 cents/gal. The next week the price decreased 1.375 cents to 73.875 cents/gal, followed by a 0.875-cent decrease to 73 cents/gal. Postings increased 5.625 cents to 78.625 cents/gal the first week of March. At mid-month, postings increased by 2.875 cents to 81.5 cents/gal. Compared to the same time in March 2025, the March 2026 prices were 13.23 cents lower. The Conway mid-February posted price was 68.87 cents/gal. The next week the price decreased 2.875 cents to 65.995 cents/gal,

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followed by a 1.25-cent decrease to 64.745 cents/gal. Postings increased 7 cents to 71.745 cent/gals the first week of March. At mid-month, postings increased 0.94 cents to 72.685 cents/gal. Compared to the same time in March 2025, the March 2026 prices were 13.565 cents lower. Mont Belvieu spots opened mid-February at 60.5 cents/gal. The next week the price remained flat, followed by a 0.5-cent increase to 61 cents/gal the next week. Spots increased 8.25 cents to 69.25 cents/gal the first week of March. At mid-month, they increased 2.25 cents to 71.5 cents/gal. Compared to the same time in March 2025, the March 2026 prices were 13.5 cents lower. Conway spots opened mid-February at 59.5 cents/gal. The next week the price decreased 0.125 cents to 59.375 cents/gal, followed by a 1.375-cent increase to 58 cents/gal the next week. Spots increased 9.5 cents to 67.5 cents/gal the first week of March. At mid-month, they increased by 0.5 cents to 68 cents/gal. Compared to the same time in March 2025, the March 2026 prices were 10.5 cents lower.

PALMDALE OIL COMPANY ACQUIRES FLEETWING

Palmdale Oil Company, a Florida-based fuels, lubricants, chemicals, propane and diesel exhaust fluids with delivery solutions provider, has acquired the assets of Fleetwing, a long-standing fuel and lubricants distributor serving commercial and industrial customers across Florida. Financial terms of the transaction were not disclosed. Founded in 1956 and headquartered in Lakeland, Florida, Fleetwing offers a product suite — supported by a large bulk storage infrastructure, numerous customer tank programs and a dedicated delivery fleet — to commercial and industrial customers across the Central Florida beltline and the state. The acquisition will strengthen Palmdale's footprint on the I-4 corridor and enhance its refined fuels and lubricants storage infrastructure, enabling the combined company to better serve customers and ensure service continuity during emergencies across the state. "Since our founding, we have built our reputation on responsiveness, reliability and trusted relationships throughout Florida," said Maryann Troiano, president and CEO of Fleetwing. "As we looked to the future, it was essential to align with a partner who shares those values and understands the critical importance of continuity — especially during periods of peak demand. Together, we are strengthening our ability to serve fleets, municipalities and commercial customers across varied industries with significantly expanded resources, enhanced supply resilience and the same high-touch, dependable service our customers have come to expect." Jones Walker LLP served as legal counsel and Raymond James served as financial advisor to Palmdale.

BEST TRANSIT INITIATES PROPANE AUTOGAS FLEET IMPLEMENTATION

BeST Transit, a mass transportation system operator, has begun converting its fleet to operate on propane autogas, one of the fastest-growing alternative fuels in the transit industry. Working closely with ROUSH CleanTech, Ferrellgas and Coach & Equipment, along with PennDOT, BeST now has six propane-fueled, fixed-route buses in service, moving the authority closer to its goal of having 70% of the fleet running on propane in the future. According to BeST Transit's executive director, Mark Hamilton, phase one of the propane conversion project includes 17 vehicles to equal 25% of the fleet; six 2025 Ford E450 buses are already in service, and four more of the same are on the way. Seven 2026 Ford Transit 350HPs are on order and will be used for the Shared Ride programs. They will be dual-fuel propane and gasoline. The BeST vehicles join more than 7,000 transit buses equipped with propane fuel systems in operation across North America.

F.W. WEBB BECOMES FULL-LINE DISTRIBUTOR OF REGO & MARSHALL EXCELSIOR PRODUCTS

F.W. Webb Company is expanding access to propane regulators by becoming a full-line distributor of RegO products. The new relationship builds on F.W. Webb's partnership with Marshall Excelsior Company, which has provided a full range of LP gas equipment for residential and commercial projects since 2024. RegO and Marshall Excelsior make up the OPW-Propane Energy Solutions family. Working with a full-line distributor helps LP gas professionals acquire components, parts and equipment regardless of project size and scope. RegO engineers and develops a wide assortment of valves, regulators, gauges, fittings and adapters for residential, commercial and bulk plant applications. By establishing this partnership, F.W. Webb furthers its mission as a comprehensive, one-stop-shop distributor. The relationship will impact new territories and deliver value to professionals across the truck stock, commercial gas distribution, commercial regulator and bulk plant storage sectors. Since it began distributing Marshall Excelsior products, F.W. Webb has successfully grown the partnership into a valuable resource for trade professionals. The LP gas division serves the entire Eastern Seaboard from Maine to Florida.

INDIANA HOUSE BILL PROTECTS PROPANE-POWERED EQUIPMENT

Editor's Note: A version of the following story was originally published in NPGA's The Bobtail newsletter.

Indiana Governor Mike Braun has signed House Bill 1150 into law. This legislation prevents local governments and homeowners' associations from banning or limiting access to motor vehicles, landscaping equipment and construction equipment based upon the type of fuel — such as propane — the machines use to operate. These legal protections safeguard consumer and business access to a range of propane-powered engine applications, including autogas vehicles, lawn mowers and scissor lifts. Matt Solak, executive director of the Indiana Propane Gas Association (IPGA), has been championing HB 1150 since it was first introduced in Indianapolis. "This legislation reinforces that state law should protect free market choice in the energy and transportation sectors," said Solak. "The IPGA appreciates policymakers taking steps to ensure pro-business policies for Hoosiers."

Industry Calendar

April 15 Missouri PGA Board of Directors
missouripropane.com
Jefferson City, MO

April 19-21 2026 NPGA Southeastern & International Propane Expo
npga.org
Nashville, TN

April 20 SEPA Board/Membership Meeting at Expo
southeastpropane.org
Nashville, TN

April 22 PERC Council Meeting
propane.com
Nashville, TN

May 5-6 Wisconsin Spring Convention
wipga.org
Sheboygan, WI

May 14 Oklahoma PGA Board Meeting
okpropane.org
Oklahoma City, OK

May 15 Western Propane Convention
westernpga.org
Portland, OR

May 15 Nevada PGA Board Meeting
nvpropane.net
Portland, OR

May 17-20 Eastern Energy Expo
easternenergyexpo.com
Uncasville, CT

May 19-20 PERC Advisory Committee Meeting
propane.com
Milwaukee, WI

May 20 Illinois PGA Board Meeting
ilpga.org
Springfield, IL

May 20-21 Michigan PGA Safety Awareness Day & Membership Meeting
mipga.org
Lansing, MI

May 28-30 Mississippi PGA Annual Convention
mspropane.com
Destin, FL

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THE FUELING STATION

This year, the National Propane Gas Association's Southeastern & International Propane Expo returns to Nashville, Tennessee. Propane's largest industry event of the year draws in exhibitors and industry members from across the globe, facilitating in-person connections and relationships that deepen the industry's emphasis on people and enhance growth opportunities. In celebration of this year's expo, take a look back at some of the memories from expos gone by.



worldliquidgasassociation ···

worldliquidgasassociation Our World Liquid Gas Association team was proud to present an update on innovation in the LPG industry last week at the 2025 National Propane Gas Association Southeastern Convention & International Propane Expo.

During our session on innovation to create a safer, smarter, and more efficient industry, we explored how cutting-edge technologies, data-driven strategies, and forward-thinking policies are reshaping the LPG sector. The conversation underscored that innovation isn't optional, it's essential.

Thank you to everyone who joined the session and contributed to the dialogue 🤩



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congerlpgas Conger LP Gas is adding a new bobtail to its fleet of vehicles. We're onsite this weekend of the 2018 NPGA Southeastern Convention & International Propane Expo in Atlanta, GA. Our new bobtail will be converted live on the showroom floor from gasoline to propane. #congerlpgas #fuelinglife #propanecandothat

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equigas Another successful NPGA Southeastern & International Propane Expo in the books. Marking 35 years of our continued presence at this outstanding industry event.

This year's expo, held in the beautiful city of Charlotte, NC, brought together nearly 4,000 attendees and featured 190 exhibitors. It was an excellent opportunity to connect with propane professionals from around the world, share insights, and strengthen industry relationships.

It's always a pleasure reconnecting with longtime colleagues and friends.

Looking forward to seeing you all in Nashville next year. Wishing everyone safe travels!



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dependableequipment Thank you, Charlotte, NC, for your incredible hospitality during the 2025 NPGA Southeastern & International Propane Expo! We had a great time in your beautiful city and hope to be back soon.

A special thank you to David "Mase" Mason at HORNETS SPORTS & ENTERTAINMENT for everything — including getting our Dependable Equipment name up on the board during the Hornets game!

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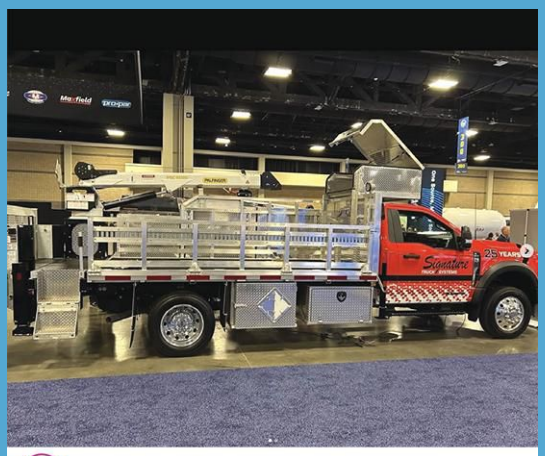
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Whitney Parsley is an associate at the M&A advisory firm Cetane Associates and specializes in M&A and corporate governance. For more information, visit cetane.com. Contact Whitney at wparsley@cetane.com.

WOULD YOU RATHER HAVE THE ABILITY TO TALK TO ANIMALS OR SPEAK ALL HUMAN LANGUAGES?

Communication is the gateway to new worlds of thought & connection, for humans & animals alike

This question really gets the wheels turning: Would you rather have the ability to talk to animals or be fluent in every human language on Earth? It's one of those delightfully impossible choices that instantly reveals something about a person's curiosity, priorities and imagination.

Reading through our colleagues' responses was an absolute treat. Some answers were expected, yet thoughtful, and surprisingly profound, while others had me laughing out loud. The creativity, wit and personality that came through in each perspective made this far more than just a hypothetical; it became a glimpse into how differently (and wonderfully) we all think. I hope you enjoy their responses as much as I did!

In this column, adopted from the familiar "Heard on the Street" format, we offer our responders a chance to answer the question posed in the title. These are their replies, reported verbatim. Enjoy!

THE GIFT OF GAB

If I could choose either, I would go with speaking all human languages. It would make it so much easier to connect with people and understand different cultures around the world. I would especially love it for the historical side of things. I studied history in college before joining the propane industry, and the Voynich Manuscript has always fascinated me. The idea of finally being able to read it and understand what it actually says would be incredible.

STACI RAMMEL
WOODRUFF ENERGY
BRIDGETON, NEW JERSEY

In our industry, communication is the most important skill there is. Being fluent in all languages would be priceless.

JESSICA JOHNSON
NATIONAL PROPANE GAS ASSOCIATION
WASHINGTON, D.C.

I would rather speak all human languages. It would be great to be able to engage with people of all cultures and learn about all the differences that make up the human race. It would be fascinating. It also would allow for me to quietly spy on so-called private conversations in languages that people assume I can't speak — great laughs. Conversely, I would not enjoy chatting it up with the local squirrels who, like me, are high-energy chatterboxes, or getting recruited into dam building by a group of beavers. So, yeah, speaking all human languages works for me.

ROBERT KENNEY
METSA TANKS
MCCALLUM, TEXAS

I'd choose speaking all human languages: As cool as talking to animals sounds, the ability to connect with people anywhere in the world feels more impactful. Language is leverage. It builds trust faster, shortens the distance between cultures and opens doors in business and in life that most people never even see. From a leadership standpoint, being able to communicate directly without a translator creates clarity. Clarity builds alignment. Alignment builds momentum. Whether it's negotiating internationally, inspiring a team or simply understanding someone's perspective without filters, that kind of access changes outcomes. There's something powerful about being able to look someone in the eye and speak their



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language. It signals respect. It builds connections instantly. Talking to animals would be fun, but speaking every human language would change the game.

MIKE DODD
PROPANE NINJA
TAMPA, FLORIDA

Although it would be interesting to know what an animal was thinking in words (like Dr. Dolittle), I would choose to be able to speak all human languages. Animals already do a fantastic job communicating without words. Being able to communicate with any human, anywhere in the world, would be an incredible advantage — especially when traveling. In college, I traveled to Paris knowing absolutely no French, and it was a very uncomfortable experience not being able to understand or communicate with the local people. While technology makes this easier today than it was back then, having the skill to communicate in any language without relying on a phone or app would be amazing!

ABBY THURSTON
RURAL COMPUTER CONSULTANTS
BIRD ISLAND, MINNESOTA

I'd prefer being able to speak to all human beings. Certainly, it is intriguing to consider the idea of speaking with animals, but I'm not sure many would be able to carry on conversations of interest, just based on the size of their brains. (There could be exceptions like whales, dolphins, great apes and elephants.) English may be the most universal language in use today, but from the standpoint of really getting to know and understand a person, being able to communicate in their native tongue would be better.

BRUCE SWIECICKI
CONSULTING ENGINEER
TINLEY PARK, ILLINOIS

It would be awesome to speak all human languages; I have always admired people who are multilingual. Traveling would become much easier and I could immerse myself more into other cultures. I also think it would be fun to converse with locals when traveling to other countries and be able to communicate fluently in their language. This would open up endless opportunities for Christian missions work and translating. It would be easier to order food at a restaurant, ask for directions or, more importantly, where to find the nearest bathroom.

TREVOR BEAUDRY
BEAUDRY OIL & PROPANE
ELK RIVER, MINNESOTA

OR ... WHAT WAS THAT MY FURRY FRIEND?

I was going to choose 'all human languages' — that would be amazing. Then, I looked it up. There are over 7,000. Nope, not for me. I'll stick with doing a better job on the English language and to talk to the animals, the furry ones in particular. Even though our world is large, my sphere of influence is limited. I am happy to stay in that space and show up for those people and pets in the best way possible.

JULIE JOHNSON
TED JOHNSON PROPANE
BALDWIN PARK, CALIFORNIA

While the idea of speaking all human languages is really intriguing, I think I'd have to go with the ability to talk to animals! We have an 11-year-old basset hound named Haggard (yes, after the country singer), and I would love to know what goes on in that brain of his based on

some of the looks we get and the sounds he gives us.

KIRSTEN MCALPIN
CONGER LP GAS INC.
TIFTON, GEORGIA

Without hesitation, I would rather speak with animals. Who wouldn't want to know what their pets are thinking when they stare at you and cock their heads in that inquisitive manner? Plus, I'd like to connect with the gentler side of God's nature.

JUDY TARANOVICH
PROCTOR GAS INC.
PROCTOR, VERMONT

Observing animals is a reminder of how expressive the natural world is. To translate their language — verbal and nonverbal — would be fascinating. It might even solve my household's current mystery, like why my cat chooses to sleep in the cardboard shipping box rather than the $60 memory foam bed it delivered — a choice she makes with the serene confidence of someone who pays no bills.

LUCY SHAFFER
SHAFFER'S BOTTLED GAS INC.
HOOVERSVILLE, PENNSYLVANIA

COMMUNICATION IS THE KEY

Whether understanding and speaking every human language or deciphering every bark, chirp and gentle nuzzle, communication remains the most empowering tool we possess. It is the bridge that turns confusion into clarity, isolation into connection and strangers into neighbors. Some of us are drawn to the richness of human conversation and the exchange of stories, cultures and ideas spanning continents. Others feel most at home in the quiet loyalty of the animal kingdom, where trust is built not just through words, but through presence and intuition.

At our core, we all crave to be heard, understood and to know that our voice matters. Communication, whether spoken, signed, sung or silently shared, reminds us that we are not alone in this vast and beautiful world. Regardless of where you find your place, there is dignity in your voice, value in your perspective and love in the connections you nurture. Communication is the sacred thread that weaves every living being together, whether spoken in many tongues or whispered in a single bark — reminding us that to be heard, to be understood and to be loved is the greatest language of all.

If you're interested in contributing responses to future Verbatim columns, please contact Parsley at wparsley@cetane.com.



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David Schlee is an attorney practicing in Kansas City, Missouri. He has been representing propane and natural gas distributors in fire and explosion litigation since 1986 and has authored BPN's Propane & the Law column since September 1989. He can be reached at dschlee@dschleelaw.com.

ODOR FADE LITIGATION: PAST, PRESENT & FUTURE — PART 2

The historical surge of 'odor fade' claims was largely abated by the development of clear resources from PERC

Part 1 of this series in last month's column reviewed the origins of the odor fade theory that plaintiffs' lawyers have used to attack the propane industry for the last 40 years. In the late 1980s and early 1990s, these lawyers and their experts took advantage of new legal theories, such as product liability and failure to warn, to mount an aggressive attack on the propane industry.

Plaintiffs zeroed in on the alleged limitations of ethyl mercaptan, the industry's odorant of choice, collectively labeling these limitations as "odor fade." They claimed that the alleged propensity for "odor fade" made ethyl mercaptan and the propane odorized with it "defective and unreasonably dangerous," in the words of the product liability laws that had by that time been adopted in one form or another by most — if not all — states in the United States.

MOUNTING CASUALTIES

Finally, plaintiffs coupled the attack on ethyl mercaptan with a failure-to-warn claim that was especially dangerous for retail distributors with no systematic program to provide and document safety education to their customers. Those retailers that provided no safety literature to customers or provided literature that made no mention of odor fade were easy prey. If they provided literature but didn't document it, they left themselves open to a plaintiff's testimony that he or she "never received it."

The casualties mounted.

What did the industry do in the face of this onslaught? First, the dosage level of ethyl mercaptan odorant was increased. There is no formal standard for this, but original industry practice had been to add 1 pound of ethyl mercaptan for every 10,000 gallons of propane. This level was reaffirmed in NFPA 58 (from the National Fire Protection Association), which does not mandate the use of any particular odorant in any particular amount, but which does state in an appendix to the code that "experience has shown" that ethyl mercaptan at the level of 1 pound per 10,000 gallons "has been recognized as an effective odorant level."

In the face of the oncoming litigation onslaught, and in light of the Bartlesville report discussed in last month's column, the industry moved to a dosage level of 1.5 pounds per 10,000 gallons, a 50% increase. (Take a moment to consider the pure power that ethyl mercaptan has as a propane odorant — a mere 1 pound or 1.5 pounds of this chemical added to 10,000 gallons is all that is needed for effective odorization.)

TAKING SAMPLES

The industry also beefed up its litigation defense capability. It began to hire defense counsel who were not only great in the courtroom but also had intimate knowledge of the industry. The industry was alert to bad incidents and mobilized immediately to respond to a scene with the appropriate experts to preserve and properly document all of the evidence before the bulldozers came.



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And perhaps most importantly, these experts immediately took liquid samples of propane from the customer tank and had these samples scientifically tested for odorant levels. In virtually all cases, the samples demonstrated odorant levels well in excess of the NFPA 58 standard.

In response to the often-asserted claim that odorant blends other than ethyl mercaptan should be used, research confirmed that ethyl mercaptan is indeed the best, albeit not perfect, alternative. In my experience — and I think other propane defense lawyers would agree — the claim that the industry should be using other chemical blends instead of ethyl mercaptan has pretty much disappeared in the last several decades.

'CONSPIRACY'

The failure to warn issue was more difficult for the industry to address because each individual propane retailer is responsible for communication with its own customers. So, when the odor fade litigation began to hit the industry, retail distributors distributed a wide variety of brochures and other materials to their customers about safety. Some were minimal and some were more extensive, but none mentioned the possibility of odor fade. This was also true of the materials that wholesale distributors provided to retailers that purchased propane. And it was also true of the manufacturers of odorant.

This opened the door for plaintiffs' attorneys to present a narrative of a vast industry "conspiracy" to "hide the facts" regarding odor fade from their customers. And the retail distributor was not the only target. A typical odor fade lawsuit in the early days of this litigation included the entire distribution chain for the propane that ended up in the customer tank, starting with the odorant manufacturer, as well as all wholesalers and pipelines that were in the chain leading to the customer tank.

A series of court decisions taught the wholesalers, pipelines and odorant manufacturers that they could pass the warning liability down to the propane retailer by conveying clear, written warnings about odor fade to the next company in the chain.

HOLDING THE BAG

This left the retail distributor in a vulnerable position; its suppliers provided the retailer with information about odor fade and told it to pass that information on to the retailer's customers. Those that did not do so were under attack not only from the plaintiffs in a lawsuit, but also from all their codefendants. It was a clever strategy on the part of the plaintiffs' lawyers. It resulted in substantial verdicts and settlements against vulnerable retailers that were pretty much left holding the bag.

How did retailers defend themselves in this situation? The best defense (although not necessarily the only defense) against a failure-to-warn claim is to warn. However, it took a few years for retailers to have access to sophisticated warning

brochures that accurately discussed the limitations of the odorant. One of the major odorant suppliers was Phillips 66 (now Conoco Phillips). Starting in 1988, Phillips came out with a customer brochure that addressed odor fade and other consumer safety information. This brochure was a good start, but it was never clear how much research had gone into the preparation of it. It gained some usage among retailers but certainly was not widespread.

PERC TO THE RESCUE

The real game changer was the Propane Education & Research Council (PERC). PERC was created by a federal statute enacted in 1996. It began operations several years later. One mission of PERC was to promote the safe use of propane. It took that mission seriously and had the resources to back it up. By the early 2000s, PERC staff were working on the development of a customer safety brochure that could be used by all retailers.

From the start, PERC did it right. A warnings expert was hired to make sure the wording and presentation of the brochure properly communicated safety issues in a clear and understandable way. Focus groups were conducted to test the language and presentation of the brochures. The first PERC brochure came out in 2005 and has been appropriately revised in the years since. It certainly seems to have gained broad acceptance within the industry, both by companies that use it and companies that have developed their own materials based on its principles. In my experience, the PERC brochure has been very well accepted by juries across the country. In one odor fade case that my former partner, John Hansen, and I tried in 2010, Michigan jurors were clearly impressed with the PERC brochure that the propane retailer had distributed to all its customers, including the plaintiff. The result was a defense verdict.

All of this has put the propane retailer in a much better position to defend an odor fade lawsuit. However, one remaining issue has emerged, and it was developed by plaintiffs' lawyers in parallel to odor fade theory and is very much related to it. That is the electronic fuel gas detector. As propane retailers improved their defenses to the odor fade claims, plaintiffs' lawyers and experts began to argue that retailers should offer or at least warn about these fuel gas detectors as a supplement to odorization to warn of a gas leak. Next month's column will trace the history of the development of these detectors and their impact on litigation against the propane industry up through the present.



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Johnny Nickel is managing editor for Butane-Propane News.

AN UPDATE ON THE NYC & NEW YORK STATE GAS BANS

The third-largest state propane market in the country faces ongoing legal threats to propane-powered equipment use in newly constructed buildings

On Jan. 1, an act banning the use of gas-fueled infrastructure and appliances in new construction under seven stories was set to take effect in New York — a deadline that is now paused in the face of ongoing court proceedings. Similarly, New York City has attempted to implement its own gas ban law, which would prohibit combustion of fuels — such as propane — on the sites of new residential buildings. Both of these proposed bans are now being challenged in court by several fuel industry associations, led by the National Propane Gas Association (NPGA).

To learn more about these bans, BPN reached out to Stephen Kaminski, NPGA president and CEO. Kaminski updated us on the current state of the bans and how the propane industry in particular can continue to fight back in court.

CAN YOU DESCRIBE THE PROPOSED GAS BANS?

Kaminksi: The proposed gas bans in New York City and New York state target the use of conventional fuel appliances in new construction. New York City's Local Law 154 prohibits on-site combustion of conventional fuels — including propane, natural gas and heating oil — in most new residential buildings by setting an emissions limit of 25 kg CO2 per million Btu, which effectively bans gas and propane appliances.

New York state's All-Electric Buildings Act similarly bans fuel-gas infrastructure and appliances in new buildings under seven stories. The ban was set to be effective Jan. 1, with phased dates for taller structures, but the coalition led by NPGA achieved a stipulation from the New York secretary of state to pause statewide ban implementation pending conclusion of litigation.

If fully implemented, both bans would eliminate new propane installations in the affected buildings, force developers to adopt all-electric designs and significantly shrink propane's market in new construction. This would directly threaten revenue, jobs and infrastructure investment for the propane industry, particularly in rural and suburban areas of New York.

WHAT IS THE LEGAL STANDING OF THE GAS BANS?

As of February, both the New York City and New York state gas bans remain under active legal challenge in federal court. The New York City ban was upheld by the Southern District of New York in March 2025, and the state ban was upheld by the Northern District of New York in July 2025. Both decisions are now on appeal to the U.S. Court of Appeals for the Second Circuit. The state ban is currently fully suspended through the conclusion of appellate litigation, pursuant to a November 2025 stipulation secured by the NPGA-led coalition, meaning it cannot be enforced until the appeal is resolved — and potentially for an additional 120 days if the state ultimately prevails. The New York City ban remains in effect for buildings already covered. A favorable ruling from the Second Circuit would invalidate the bans.

WHAT WERE THE MAIN POINTS OF THE ORAL ARGUMENT(S) POSED BY THE PLAINTIFFS BEFORE THE U.S. COURT OF APPEALS?

At the Jan. 30 oral arguments before the U.S. Court of Appeals for the Second Circuit, the plaintiffs — including NPGA, the New York Propane Gas Association (NYPGA), Mulhern Gas, plumbers, contractors, homebuilders and unions



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— argued that both bans are expressly preempted by the federal Energy Policy and Conservation Act (EPCA). EPCA prohibits states and localities from adopting regulations 'concerning the energy use' of covered appliances such as furnaces, water heaters and stoves. The plaintiffs emphasized that the bans effectively set the energy use of gas appliances to zero by prohibiting them outright.

They stressed that Congress intentionally designed EPCA with separate standards by fuel type to preserve consumer choice and prevent any single fuel from being regulated out of existence. They further contended that the bans conflict with federal appliance-efficiency standards, which assume gas appliances exist and can be improved. The plaintiffs urged the court to follow the U.S. Court of Appeals for the Ninth Circuit's 2023 ruling in California Restaurant Association v. City of Berkeley, which struck down a gas ban in Berkeley, California.

WHAT WERE THE MAIN POINTS OF THE ARGUMENT(S) POSED BY THE DEFENDANTS IN BOTH CASES?

New York City and New York state argued that their respective bans regulate the type of fuel that is used, not the quantity of energy that an appliance consumes, and repeatedly characterized the policy as 'agnostic' to energy use. The defendants maintained that EPCA does not prevent states or cities from adopting all-electric building codes and contended that the Ninth Circuit's Berkeley decision was wrongly decided and should not be followed by the Second Circuit.

WHAT WERE SOME OF THE MAJOR TAKEAWAYS FROM THE MOST RECENT COURT HEARINGS?

The Jan. 30 hearings before the Second Circuit panel — Judges Perez, Sack and Preska — produced several encouraging takeaways for the plaintiffs. Judge Perez was the most active in asking questions. The judges focused closely on the statutory text of EPCA rather than policy considerations, closely examining how appliances are tested for energy use, whether a regulation that effectively sets maximum energy use at zero is preempted and the precise meaning of the phrase 'concerning the energy use.' Judge Perez explicitly told the other side that she was not interested in policy arguments. The panel appeared to take the Ninth Circuit's Berkeley precedent seriously. A written decision is expected in the coming months.

WHAT ARE THE NEXT STEPS INVOLVED IN THIS CASE?

Following the Jan. 30 oral arguments, the Second Circuit will issue a written opinion, typically within three to nine months. If the plaintiffs prevail, both bans would be struck down. Either losing side could then seek en banc rehearing by the full Second Circuit (rather than just the panel of three judges) or petition for review before the U.S. Supreme Court.

WHAT WOULD BE THE SIGNIFICANCE OF WINNING THESE CASES, BOTH IN NEW YORK AND ACROSS THE COUNTRY?

A victory in these cases would have far-reaching implications. It would protect propane access in new construction throughout New York, establish strong precedent that EPCA preempts gas bans across the country and deter similar measures in other states and cities — especially those in the Second Circuit, which is comprised of Connecticut, New York and Vermont. Such a win would preserve consumer energy choice,

affordability, reliability and backup-power options while safeguarding jobs and investment throughout the propane supply chain. As the second federal appellate court to consider this issue (in addition to the Ninth Circuit in the Berkeley case), a victory would strengthen the propane industry's legal position nationwide.

New York is the third-largest state propane market in the country, with roughly 430 million gallons sold annually. And the state is a vital market in PADD 1 [East Coast]. Furthermore, its combined residential and commercial sector is the largest in the U.S.

The Empire State also presents tremendous opportunity for organic gallon growth, as 1.2 million households still rely on antiquated heating oil systems for space heating purposes. Converting these customers to efficient propane equipment would reduce greenhouse gas emissions, improve air quality and better protect the land and water resources New Yorkers treasure.

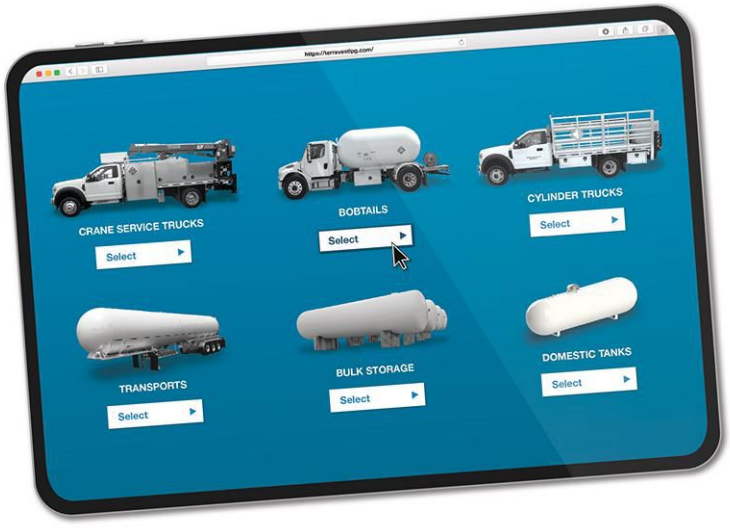
HOW CAN INDUSTRY MEMBERS ADVOCATE FOR PROPANE IN THEIR OWN SPHERES OF INFLUENCE?

Propane industry members can support these efforts in several ways. They can join or renew membership in NPGA and their state association. Members can also participate in their state association's advocacy efforts or attend Propane Days, our [annual] Washington, D.C. advocacy day in June. Educating local officials, developers and customers about propane's safety, efficiency, cost effectiveness and resilience advantages is another powerful step.

IS THERE ANYTHING ELSE YOU WOULD LIKE TO ADD ABOUT THESE CASES?

These gas ban challenges are some of the most important legal battles the propane industry has fought — and proactively advocating for the propane industry is exactly why NPGA created the Legal Action Fund. I personally attended the Jan. 30 arguments, and our counsel was very strong. The judges' focus on the statute and the Berkeley precedent is encouraging.

NPGA, NYPGA and our coalition partners remain fully committed to pursuing this matter through to a final victory that protects propane access for generations to come. We will continue to share updates as soon as the Second Circuit issues its ruling.



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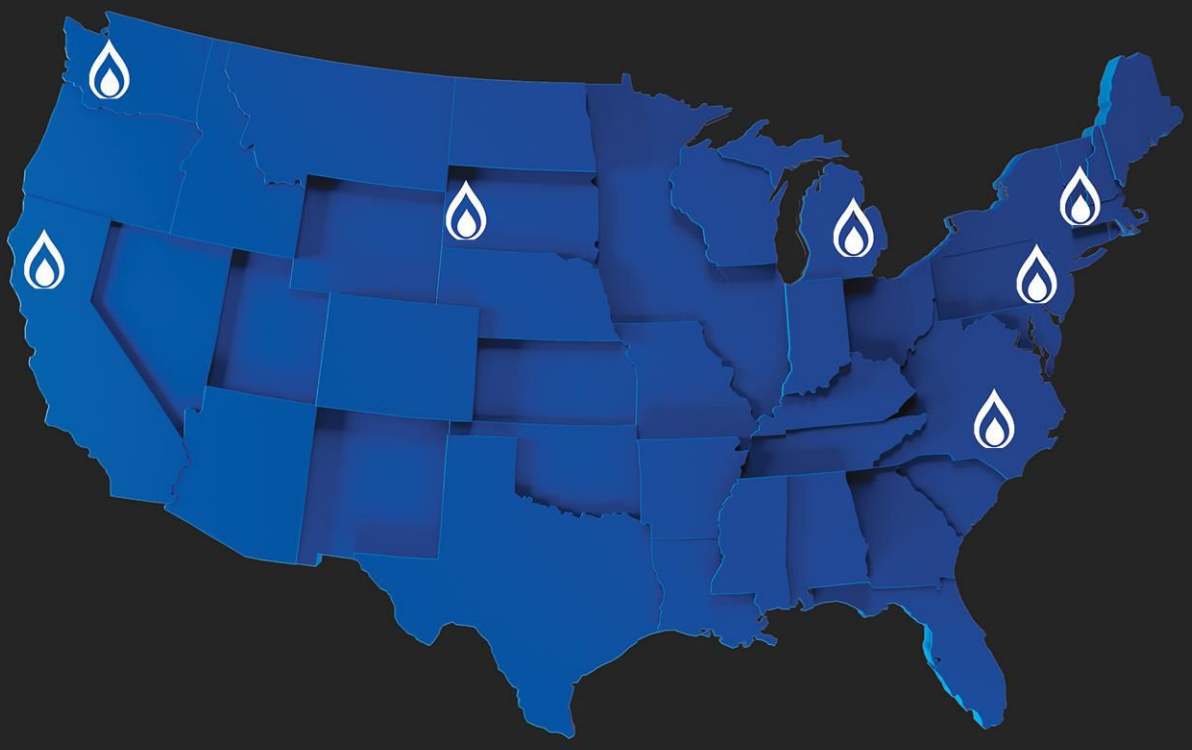
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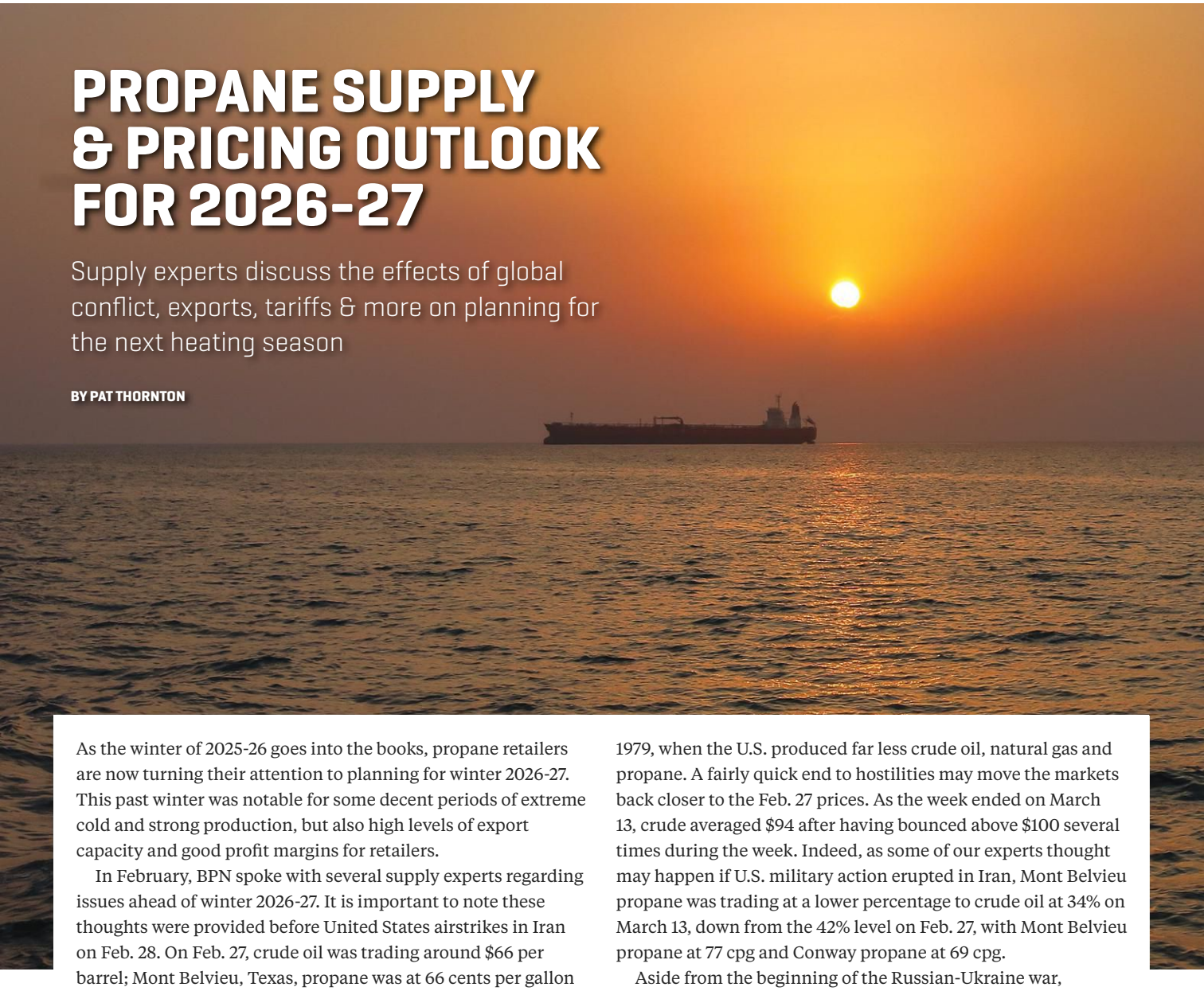
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PROPANE SUPPLY & PRICING OUTLOOK FOR 2026-27

Supply experts discuss the effects of global conflict, exports, tariffs & more on planning for the next heating season

BY PAT THORNTON

As the winter of 2025-26 goes into the books, propane retailers are now turning their attention to planning for winter 2026-27. This past winter was notable for some decent periods of extreme cold and strong production, but also high levels of export capacity and good profit margins for retailers.

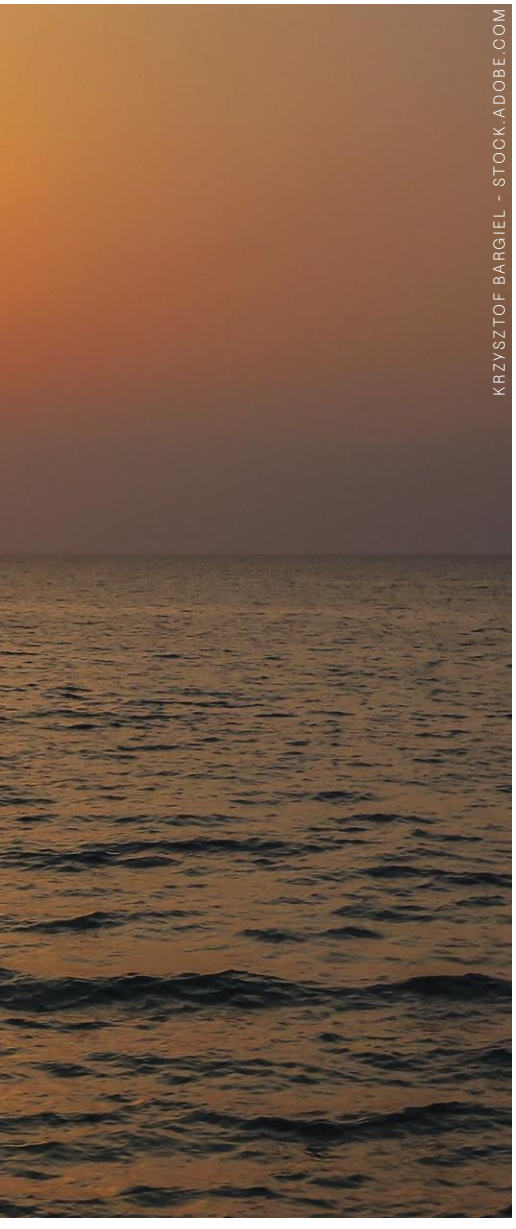
In February, BPN spoke with several supply experts regarding issues ahead of winter 2026-27. It is important to note these thoughts were provided before United States airstrikes in Iran on Feb. 28. On Feb. 27, crude oil was trading around $66 per barrel; Mont Belvieu, Texas, propane was at 66 cents per gallon (cpg); and Conway, Kansas, propane was at 60 cpg.

The airstrikes in Iran and the immediate fallout changed the dynamics, as major world events often do. As time goes on, though, sometimes supply disruptions are resolved quickly and a price spike one day ends up followed by a decline that is sometimes as fast as the spike. Our experts discussed looming tensions between the U.S. and Iran before they became a reality. As our article goes to press on March 18, we simply don't know the answer to key questions that will be playing out for the next several weeks and months — some before and some after you read this article. By now, we do know that crude oil shipments have been severely slowed at the Strait of Hormuz, which usually sees 20% of the world's crude supply flow through each year. Our current challenges would be more severe if they occured during the last major U.S. conflict with Iran in 1979, when the U.S. produced far less crude oil, natural gas and propane. A fairly quick end to hostilities may move the markets back closer to the Feb. 27 prices. As the week ended on March 13, crude averaged $94 after having bounced above $100 several times during the week. Indeed, as some of our experts thought may happen if U.S. military action erupted in Iran, Mont Belvieu propane was trading at a lower percentage to crude oil at 34% on March 13, down from the 42% level on Feb. 27, with Mont Belvieu propane at 77 cpg and Conway propane at 69 cpg.

Aside from the beginning of the Russian-Ukraine war, which just entered its fifth year in February, crude oil prices have remained in the $55 to $75 range during the war until the aftermath of the U.S. airstrikes on Iran on Feb. 28. If key supply distribution issues are resolved soon, we may ultimately see prices back in this range in the coming weeks or months. With that in mind, the rest of the article shares our experts' thoughts prior to the Feb. 28 airstrikes in Iran.

WITH GLOBAL TENSIONS RISING, HOW COULD 2026-27 SUPPLY PLANNING BE AFFECTED?

"I think retailers must look at the supply world from the perspective of how prices will move higher," said Jeff Thompson, propane consultant at Propane Resources. "This is not because I want prices to move higher. Simply, the risk of $1.50 propane is greater than 30-cent propane. The market


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could see 30-cent propane, but it will not last if we do see it."

Thompson feels the risk is a world where propane prices are based on crude oil price curves with some percentage flexibility with propane pricing. "As an example, if WTI crude moves to $45 a barrel, propane can change its percentage to crude to 55%, putting spot pricing at 58 cents a gallon," he said, "Let's say Iran and the U.S. get into a hot war. If crude goes to $80 a barrel, propane could slip to 35% of crude or less for a period (especially coming out of heating season with high inventory levels)."

Thompson believed propane on a spot basis could price at 65 to 66 cpg. "What these scenarios paint is limited downside to the propane market from current price levels. It is hard to think of strong upside drivers right now in the market, as well, but I am looking for reasons this market moves up, not down."

"Consider the risk associated with geopolitical conflicts today as a reality, not as a possibility," said Phil Farris, director of wholesale marketing at 3Eight Energy. "The continuing conflict between Russia and Ukraine, tensions in the Middle East and the brewing disruptions in Africa all affect demand for U.S. exports. While the U.S. is a major producer, propane is a global commodity, and the U.S. NGL market can get swept up with energy markets in the event of a disruption."

Farris said marketers have no control over the events or the reactions, but they can control your exposure and the potential impact of such events on your business. "Take the time to prepare and protect yourself financially by always having a fixed price supply option or backstop in place. That kind of supply cost protection is not just for homegrown winter issues."

"The ongoing volatility in the international political environment will likely pose risks to price, not supply volumes, for the domestic business," said Anne Keller, managing director of Midstream Energy Group. "The U.S. market is so long propane, at least on the Gulf Coast, that it shouldn't be difficult to replenish inventories that have been pulled way down by this crazy winter. The issue is deciding what price you're willing to lock in for and whether you want to top up storage."

Going forward, Keller would ask the data center industry whether it's willing to take chances on price and the availability of gas for all the power it wants to add, given the expansion in export capacity and potential for slowing production growth. "Propane could be a good alternative idea for powering these facilities."

DD Alexander, president of Global Gas and chair-elect of the National Propane Gas Association, commented that crude oil has been projected to be over-supplied throughout 2026 and beyond. "If Russia and Ukraine remain at war, there is the potential for more of Russia's energy infrastructure to be destroyed and the U.S. sanctions to take hold regarding the amount of Russian oil that makes it to the market. This obviously affects the price of crude, which has a direct effect on the price of propane. If prices remain low, this is a potential opportunity for dealers to lock in historically low prices for the upcoming winter season."

INCREASED PRODUCTION & EXPORT CAPACITY

With propane production recently increasing in the United States, but export capacity up from 1.8 million barrels per day (MMbbld) to 2.4 MMbbld, what are the challenges to maintaining strong supply levels in the U.S.?

"Price is a strong neutralizer," said Alexander. "Currently, inventory levels are above the five-year average and prices are below the last 10 years. If prices increase, production will grow accordingly. If there is further price erosion, exports will likely … increase."

Alexander noted that with production where it is, the country is in the driver's seat. "If the U.S. needs more inventory, an increase in price will most likely balance out our supply and demand."

Thompson said he is not too concerned about maintaining strong supply levels in the U.S. "Enterprise, Targa, P66, Energy Transfer and others have not spent billions of dollars on buildouts and upgrades to not fully utilize and monetize their export facilities," he said. "This tells me that producers and midstream companies currently are more than comfortable with the current and projected production schedules for the near future."

Thompson believes it is reasonable to think by 2028/2029, the U.S. could have more than 3 million barrels of export capacity. "This is not built to be idle nor built to chase higher prices," he said. "Supply should not be an issue, and an immediate concern coming out of heating season is there may be a physical issue of too much supply in the system. Of course, the greatest way to ensure supply is price."

Keller said, "It looks like supply will still grow in 2026 due to expanding pipeline capacity out of Permian that will relieve takeaway constraints and let more gas flow through the system into the Texas Gulf Coast."

Keller believes with oil production in the Permian Basin seemingly plateaued for now, at least, we should be set for a long time for global market access.

"Going forward, though, we'll need to somehow resolve the issue of increasing water handling requirements to maintain drilling activity in the associated gas fields of West Texas, as well as the cost pressures that lower crude prices bring, to see significant supply growth post-2027," she said. "Higher levels of drilling activity in Haynesville to boost LNG feed gas supply won't bring on a lot of NGLs since a lot of these wells are deeper and 'drier' in the sense of having lower NGL content."

ARE TARIFFS STILL A CONCERN AMID 2026-27 PLANNING?

With tariffs having been a hot topic during President Donald Trump's second term, BPN asked what challenges and concerns lie ahead due to tariff activity.

"Tariffs are an interesting topic," Thompson said. "Prior to income taxes in the 20th century, tariffs were the primary way nations funded government operations. So, the implementation is not new or unique. The challenge becomes overseas producers paying to sell their goods and services in the U.S. and who pays the price."

Thompson said that, from a propane point of view, nations that export goods and services look at tariffs as punitive, while nations that are net importers of goods and services look at tariffs as a reasonable and sound business practice.

"Asia — China in particular — has a structural dependency on U.S. propane," Thompson said. "China's PDH market is built on cheap propane. China is doing what it can to diversify, importing from Canada and the Middle East. In the end, price will be the driver. Arbitrage will always be a driver. Add in strategic trade conversations, and it is hard to see significant changes to propane export trade routes in the future."

"The cost of keeping up with what's become a fast-moving target increases administrative expense for government affairs, regulatory tracking and cost estimating," Keller said. "The uncertainty due to the Supreme Court decision [to strike down President Trump's tariffs] presents further challenges for companies trying to plan long-term capital projects, since we won't be able to produce everything we need for them here for quite some time."

"Fortunately, propane is exempt from tariffs on propane from Canada," Alexander said. "We should not see tariffs as a driver for propane not being exported from Canada to the U.S."

Alexander sees the larger factor on less gas coming to the U.S. from Canada as Canada's increased maritime export capacity. "The Canadians are exporting a significant amount of production out of maritime ports on the western side of Canada. This is reducing the amount of propane that is available to be exported to the U.S."

HAVE ALLOCATION CHALLENGES BECOME A BIGGER ISSUE?

BPN noted retailers have expressed frustration about allocation and asked what they can do to mitigate such issues.

"I believe many in our industry got complacent during the last three years (prior to last winter) of warm winters," Alexander said. "This led many to reduce their contracts or worse, not contract at all. It is imperative to have annual supply contracts to cover most of your winter demand. It is just as important to ensure your supply is diversified from multiple supply points."

Alexander noted just as important is the transportation of the gas."Make sure your supplier has a strong transportation company behind them. Having one without the other gets you nowhere!"

Keller commented that it's possible the continued shift from producers marketing or controlling the marketing of their own propane production to having midstream companies take over that role and serving as aggregators for the export market will change the landscape for the domestic industry.

"As supply growth slows and export capacity expands, domestic companies will increasingly be in competition with buyers overseas for gallons," she said. "In the midcontinent, Y-grade pipeline capacity continues to expand, siphoning more gallons down through Conway and on to the Gulf Coast to generate fees for midstream companies. You need to know where your supplier gets their product. And realize you may need to be open to storing more than you used to in order to have it when you need it near your markets."

Keller said there is at least one project underway in the Permian to put in local fractionation to extract propane to ship to California in the wake of refinery closures.

"There is plenty of propane," Thompson said. "It was in the wrong place for many retailers. Allocation is always the struggle when it's on. Why is supply always curtailed when a retailer needs it the most?"

He said one of the best things a retailer can do is deep dive into their supply plan, post-heating season. "Retailers have a choice to build the cheapest supply plan possible and recognize there will be periods of time when supply will be nonexistent and/or expensive, or build a supply plan that is not the cheapest but keeps the retailer out of the game of picking up pennies to lose dollars."

Thompson said that for all the allocation nightmares he heard this year,



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he also heard retailers with suppliers that took care of them without raising cost of goods sold excessively higher. "All it takes is one year paying 30-40 cents per gallon higher to give back and more, the 2 cents per year a retailer saved over the past 10 years. Allocation is inevitable, but if a retailer works with suppliers year-round, the suppliers will work with the retailer."

Thompson's advice to marketers: "First, build a marketing plan. Second, build a supply plan to fit the marketing plan. Once a retailer knows what gross margin is needed, supply becomes fairly simple. A robust supply plan is going to cost a retailer a few more cents per gallon initially to set up."

He said this year, the setup was worth it. "The marketing plan is the driver. The more a retailer can get the customer base on budget pay and similar programs, the delivery efficiency goes up. A retailer that has the capacity and willingness to build and educate customers to take gallons in summer increases available allocated gallons in the winter. Market year-round service and delivery backed with a robust supply plan, and allocation becomes less of an issue."

"There is no uncertainty if you are not getting the product you want or need — just stress and aggravation," Farris said. "That's what allocation is all about: Demand exceeds supply, so the supply is rationed out to parties. The definition itself means it will usually come at the most critical time for supply to not be disrupted or constrained. It's not a lack of product; it is a lack of immediate delivery capacity, often when you need product most (peak cold snaps).

"Unfortunately, the rules of the game haven't really changed," he continued. "You can buy and sell more to earn more, but really there's not much you can do to change the process. Downstream infrastructure has not kept pace with production or peak retail demand. While there is plenty of propane, distribution is the bottleneck. Managing propane allocation is usually a very tedious process, and its effectiveness is subject to trucking, weather and facility operational issues.

"If you think allocation is a given, you either plan to allocate your own operation (get by with what you get), or you plan on incremental supply — or both!" Farris concluded. "If you expect your supplier to simply 'find more' during a crisis, that isn't a plan. Working as a team to secure alternatives is. More bulk storage can help to weather the allocation and secondary supply. This is not a 'backup' that you call on when desperate; it is a secondary source you commit to."

DOES IT MAKE SENSE TO BUY FOR THE NEXT SEASON OR TWO?

"The market is currently showing Q4 2026 prices at 45% of WTI — that seems like a decent buy," Keller said. "My personal bias is for stronger prices in the fourth quarter; even though the Trump administration will work hard to keep crude prices down to counter concerns around affordability going into the midterm elections, I think the 'Big Supply Surprise' (as in, there's not as much crude production capacity out there as we thought) will put a bid under the market by then."

Keller said that if she were in a region that's seeing reduced length due to refinery closures or addition of more ways to move gas plant NGLs to the coast, she would look at storage at least for 2027 and beyond.

"With the prices of propane below the 10-year pricing, there is definitely an opportunity to lock in pricing for next year for at least part of your supply needs," Alexander said. "If we have an uptick in exports, our supply and therefore price can change in a hurry. Of course, there is always the reverse of that: If oil prices tank, propane prices will reduce further. You must look at the risk/reward and determine what is best for your operations."

"I am watching the market to see if we get one more leg down in pricing before starting," Thompson said. "Yet, it depends on the retailer marketing plan. There is a level of uncertainty in the market right now. If economic conditions worsen, we could see a softer propane market through the remainder of 2026. If gas prices remain lower this summer, we could see economic stability and growth, which could see crude prices push moderately higher as we head into the second half of the year. I go back to building the marketing plan first, then supply becomes a lot simpler."

"It is a good opportunity, and if you need some evidence, look at the past 20 years," Farris said. "Except for two relatively short periods, one being the COVID-19 experience, Mont Belvieu generally has a floor around 60 cpg. The forward market data reflects a Mont Belvieu range of 60-70 cpg. If you can secure supply at that basis range for the next two winters, you are buying near the bottom of the historical 20-year range.

"Those figures obviously equate to a higher price at the final supply point," Farris added. "As we have seen again this winter, the Mont Belvieu basis and the terminal rack price are two separate markets. Downstream markets can quickly spike due to infrastructure and transportation limitations, allocation, weather, rail delays, etc. There is a bearish sentiment now because of over-production fears, but at 60-65 cents, the downside risk feels lower than the upside."

ARE THERE NEW RULES OF THUMB REGARDING STORAGE?

Though storage needs may vary between regions, BPN asked for any rules of thumb regarding necessary propane storage on hand for a propane company.

"Obviously, the farther away from a major hub, the more storage you should have," Alexander said. "Storage has been harder and harder to add to retail propane plants over the last 40 years. If you have the opportunity to add storage at your facility, you should. Storage will just keep getting more valuable."

Alexander said as far as storage owned by a third party, you still have to truck it to your facility. "Having your own storage on-site gives you maximum flexibility."

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"I looked at storage this winter," Thompson said. "It is a tough call whether to add storage. In a perfect world, a retailer should consider the peak demand period historically and have at least three weeks of storage.

"It is possible to potentially get a similar amount of storage at similar or less cost where it is needed most at the customer's location. This feeds back into the marketing plan and filling the customer tanks in the summer. The retailer doubles the capacity to deliver in the summer, increasing allocation availability in the winter, reducing the strain on storage limitations at the bulk facility during historically peak demand."

"I think the only standard or rule of thumb in the Southeast is 'more,'" Farris said. "A lot depends on proximity to supply points, transportation options and winter-to-summer ratio. The further you are from your primary supply point, the more you may need. And if you don't have access to secondary supply, your bulk storage is even more critical.

"Propane supply infrastructure and transportation in the Southeast operates much like it has for decades," Farris continued. "Gallons over the past two winters are up, ratios are down and the burden of storage is on the retailer. Don't rely on the system; invest in your business and take care of yourself to manage whatever issues the winter brings. The fact that little has changed over the years puts more emphasis on relationships. Partner with experienced suppliers that are committed to your success. The retailer, the supplier and the transporter must work together as a team. Some teams are more committed and experienced than others."

"Seems like at least once a decade someone commissions a study about storage, usually when a brutal winter has caught people short," Keller said. "The findings haven't changed much: Basically, the folks at the level between the pipeline terminals and the end users really don't want to carry inventory. Level billing, off-season fills, you name it — the industry has done it to manage this significant piece of its cost.

"People who are in this business know — or can go back to see — which regions end up challenged in terms of meeting their market needs most often," Keller added. "If you're asking the question, you already know the answer."

Pat Thornton is a 29-year veteran of the propane industry, with 20 years at Propane Resources and five years at Butane-Propane News. He is the publisher of Trending in Propane and has also served on the Propane Education & Research Council (PERC) Safety & Training Advisory Committee and the Missouri PERC board of directors.



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HOW TANK REFURBISHMENT SHAPES COST-EFFECTIVE ASSET MANAGEMENT IN PROPANE

Marketers are increasingly using refurbishment strategies to extend asset life, strengthen capital efficiency & improve long-term fleet management

BY ADAM GAZAPIAN

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If you operate in propane long enough, you understand that tank inventory is more than equipment — it's deployed capital. Every tank in the field represents infrastructure earning margin over time. Every tank in the yard represents capital that is either working or waiting.

As capital discipline becomes increasingly important across the industry, more operators are taking a structured look at how refurbishment — both purchasing refurbished tanks and restoring existing fleet assets — fits into a long-term asset management strategy.

What's emerging isn't a trend. It's a more intentional managing infrastructure.

PURCHASING PROFESSIONALLY REFURBISHED TANKS

For many marketers, adding refurbished tanks to fleet inventory has become a practical capital strategy. A professionally refurbished tank is not simply repainted. A structured restoration process includes the following:

- Blasting to bare steel
- Inspection for corrosion and pitting
- Measured evaluation where necessary
- Replacement of valves and gauges
- Structural repair if required
- Application of durable coating systems
- Compliance verification completed prior to release

When this is executed under defined standards, the result is a field-ready asset prepared for deployment. From a financial view, purchasing refurbished tanks allows operators to increase deployable inventory with a lower capital requirement per unit.

Across hundreds or thousands of placements, that difference can materially affect capital allocation and payback cycles. The refurbishment benefit is straightforward. It places reliable infrastructure in the field with disciplined capital deployment.

For companies managing growth, acquisitions or seasonal inventory demands, this provides additional flexibility without compromising compliance or performance.

REFURBISHING CUSTOMER-OWNED FLEET ASSETS

Equally important is the restoration of tanks already owned by operators.

Every fleet accumulates tanks that return from service with surface corrosion, worn components or cosmetic degradation. In many cases, these

tanks remain structurally sound but are removed from rotation due to appearance or uncertainty about condition.

A structured refurbishment program allows those assets to be evaluated based on inspection criteria rather than assumption.

Units that qualify are restored through a documented process and returned to service. Units that do not qualify are clearly identified. This approach creates measurable benefits:

- Extends the productive life of existing capital
- Reduces idle yard inventory
- Improves overall fleet visibility and accountability
- Strengthens return on your invested capital

Instead of writing off viable infrastructure, operators convert it back into revenue-producing assets. For large fleets, building refurbishment cycles into off-season planning smooths capital expenditure and reduces reactive equipment decisions during peak months.

RELIABILITY & STANDARDS DRIVE CONFIDENCE

In propane, reliability is nonnegotiable. A tank placed in the field must meet operational and regulatory standards, regardless of when it was manufactured.

Professional refurbishment programs operate within established Department of Transportation (DOT) and American Society of Mechanical Engineers (ASME) frameworks. Inspection, measurement where warranted, component replacement and compliance verification are not optional steps. They are foundational. The determining factor in a tank's continued serviceability is condition and compliance, not age alone.

As refurbishment processes have matured across the industry, greater standardization and documentation have increased confidence among operators evaluating both purchase and restoration options. The focus has shifted from perception to measurable criteria.

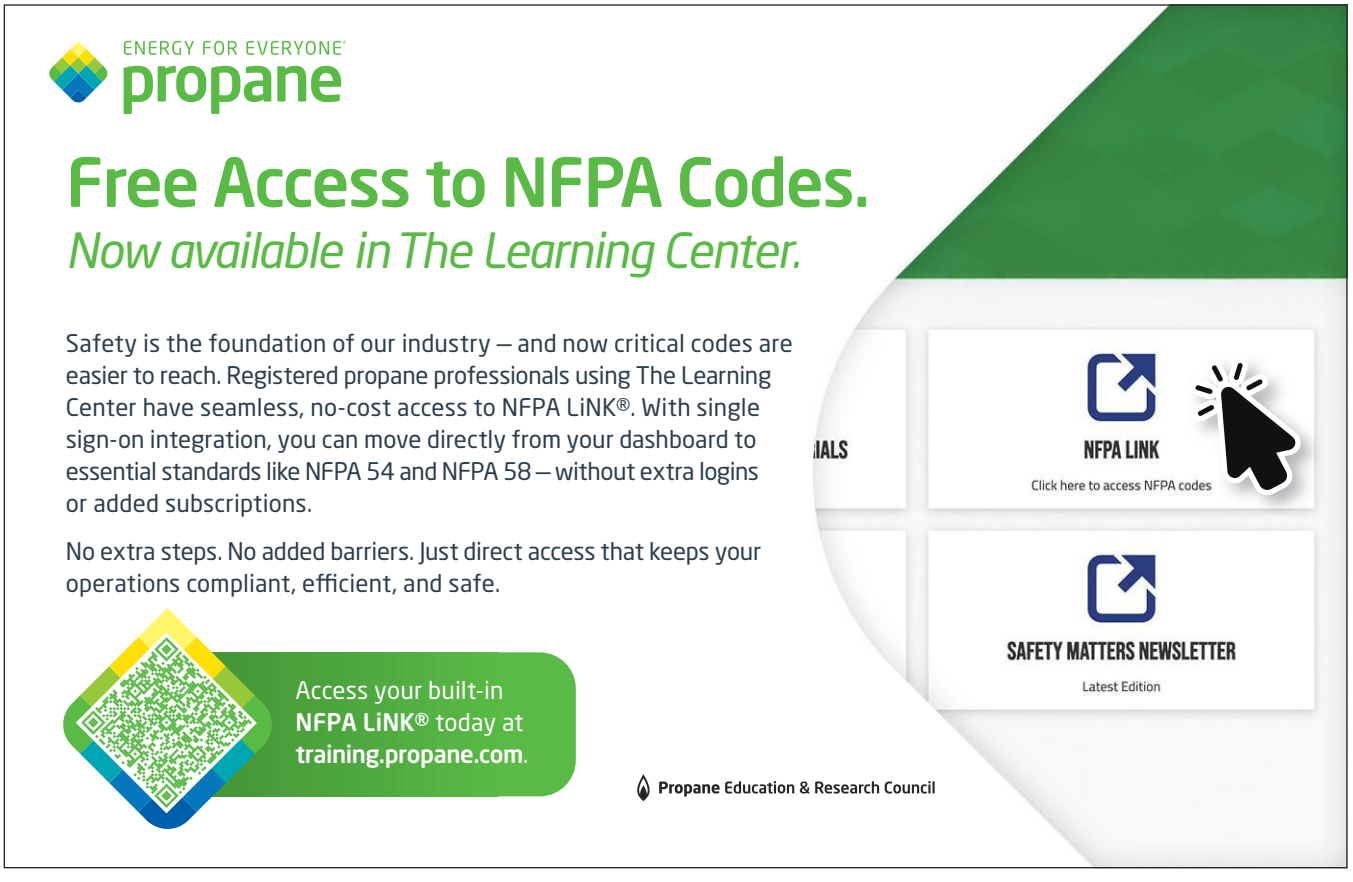
COST-EFFECTIVE ASSET MANAGEMENT IN PRACTICE

Cost-effective asset management does not mean minimizing investment. It means allocating capital in a way that maximizes performance over time.

Purchasing professionally refurbished tanks increases fleet capacity with disciplined capital deployment. Refurbishing customer-owned tanks restores viable infrastructure already paid for. Together, these approaches:

- Improve capital productivity
- Support measured growth
- Increase operational flexibility
- Reduce waste of usable assets
- Strengthen long-term financial stability and resilience

For operators managing multiyear capital cycles, these factors compound.



THE VALUE OF PROFESSIONAL SPECIALIZATION

For many operators, the decision is not whether to refurbish, but how. While some level of maintenance can be handled internally, comprehensive restoration requires controlled processes, trained technicians and facility infrastructure designed specifically for tank evaluation and coating performance.

Dedicated refurbishment companies operate with equipment and workflow built for repeatability: full blast systems, measured corrosion assessment tools, standardized component replacement protocols, controlled coating environments and documented compliance verification.

When restoration is performed within that framework, operators gain consistency, labor efficiency and traceability that can be difficult to replicate on a small scale.

From a cost standpoint, specialization matters. Purpose-built refurbishment facilities spread overhead across high unit volume, reducing per-tank processing cost while maintaining inspection discipline.

For operators evaluating long-term capital strategy, partnering with a company whose sole focus is structured tank restoration can deliver both economic efficiency and process confidence.

A PRACTICAL INDUSTRY SHIFT

The propane industry has always been built on steady operators — companies that think long term, manage risk carefully and protect margin.

Tank refurbishment, applied within defined standards, aligns with that mindset. It treats tanks as managed infrastructure rather than single-use purchases. It emphasizes inspection-based decision-making. It strengthens both balance sheet efficiency and operational readiness.

For companies willing to evaluate refurbishment through process, documentation and measurable outcomes, it has become a practical tool in shaping cost-effective asset management across the fleet.

In an industry where durable decisions matter more than quick ones, that evolution is significant.

Adam Gazapian is a propane industry professional and owner of Aultra Tank & Equipment, with locations in Portage, Wisconsin, and Wells, Nevada. He is focused on tank asset management, refurbishment strategy and multistate operations. Aultra Tank & Equipment works with marketers nationwide on life-cycle planning, capital efficiency and fleet optimization, with an emphasis on disciplined process standards and long-term infrastructure stewardship. Visit aultratank.com.



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AI, accounting software & the complex technologies advancing routing strategies

BY DAVID KROUTIL

The next time you gather around for family dinner with grandpa, you might want to ask him how he and his dad did route optimization for their trucks back in the 1960s. After you get past the puzzled look, you might ask some questions:

"Grandpa, how did you know the best way to organize your deliveries for a day?"

He replies, "Uncle Steve."

"But how did you know where each stop was?"

"Uncle Steve."

"How did you know if your drivers could deliver everything and not run out?"

"Uncle Steve."

Yes, every company had an "Uncle Steve" who just had it "in his head" and after 20 years knew every customer location, where the tanks were, what the schedules were and everything else routing-related.

Today, things are a little different. Some of us still have an Uncle Steve, but we also have GPS satellites, highly predictable mathematical routines for calculating optimization and dozens of other tools that are readily available to all propane delivery companies. Moreover, we have electronic databases of our customers that can manage the process of storing and updating routes in seconds. All of these factors have changed the landscape of route optimization in our own enterprises. It has allowed us to use team members with average or better skills to be highly successful and give us the same advantages "the big boys" have. Almost as good as Uncle Steve.

> The next decade will likely see as many changes in route optimization as did the entire last half century. New routing tools are coming at us faster & faster.

SO HOW DOES THIS ALL WORK?

When we start thinking of route optimization, we generally think about maps and organizing things geographically so we can save time and diesel. In the old days, this meant thumbing through a route book and then putting a pin on the map to reference each delivery location. Obviously, this was time-consuming and painful. It took hours, but it did give a clear view of where the customers were, and we could make a plan to get them all delivered.

Today, route accounting software has become more sophisticated, with many providing all delivery locations organized and available in electronic form. This makes it easy for either your route accounting software program to optimize stops (if it has that capability) or export the delivery data into a program that can do the task for you.

This saves hundreds of hours, duplicates databases and makes it possible to reorganize routes quickly — even optimizing daily, if needed. While some companies do use external tools for this process, many retail propane companies have this built into their route accounting system for seamless access.

As routes are optimized, your software should take into account not only the geographic location of the customer, but their opening hours, prior usage, size of tank and special requirements. In addition, it should also look at external factors such as weather, traffic on roadways, restricted access (bridges and tunnels) and a myriad of other factors. The algorithms used for this process are sophisticated and accurate.

THE ROLE OF AI IN ROUTE OPTIMIZATION

Some of you may be curious to know how AI has played into this space. Over the last few years, we have been bombarded with everything AI: AI can do this and AI can do that. It seems as if AI can solve every problem, from raising your children to picking a winning stock.

While in the early days, there was more hype than substance, things are slowly starting to change, and we are starting to see measurable benefits from AI tools. From writing emails that actually sound like your style to doing a better job of finding information than Google, the tools are evolving to find more useful applications in the workplace.

When it comes to route optimization, the transition is more hidden as software suppliers integrate the better logic found in AI to improve efficiencies in their products. After spending decades perfecting optimization logic, developers are finding new ways to incorporate more data in doing predictive deliveries and optimal route times.

One thing you can do to get onto this wave is to sharpen your AI skills. While most of us are familiar with ChatGPT, what do you know about Claude or Jasper, Gemini and Copilot? By taking a few short courses and investing a little time, you can have a better feel for what tools may be best tailored to your corporate needs. Generally, none of us have time to become AI experts, but a little information can help us ask our team better questions. Furthermore, when AI is embedded into your optimization routines, you may not even be aware of its presence — it just does what it does even better.

How do you jump onto the electronic optimization bandwagon? The best place to start is to determine what your business needs most from route optimization. Will this be a one-off exercise, or something that you will be doing as an ongoing exercise? Do you

have someone in your organization that can take this on? How do you get your stops geocoded? Who can help you get started?

Start with your existing route accounting software provider if you have one. They will know if their software can do those tasks for you. If not, they will often know what integrates nicely with their software.

Depending on your needs, you can forge a path that will provide the best bang for the buck. If you are using Quickbooks or a nonpropane-specific software package, you can Google what is compatible (or use an AI tool) for help.

After you determine what tool you will need, you will want to start the implementation process, which includes setting up various parameters, geocoding customers, determining service areas, etc. This may take a few days or even longer depending on the quality of your data and the size of your company. The time you spend cleaning up bad addresses and other information will come back to you tenfold as you start to run optimization scenarios.

With setup complete, you can now start to play "what if?" to get sample suggestions and output. Don't take what the system says to do as gospel. Look at the output and compare it to what you do today. Ask your dispatcher and even the drivers if it makes sense.

Once you can build some trust with the tool and its output, it's a game changer. There is a real sense of accomplishment as you see your routes in a whole new light. It gives you the flexibility with a couple of clicks to try different things and be creative with the resources that you have. It also allows you to pivot quickly if something happens and you need to adjust. You are doing things that Uncle Steve could only dream of!

The next decade will likely see as many changes in route optimization as did the entire last half century. New routing tools are coming at us faster and faster. By understanding what is needed and a few basic concepts, we will not only avoid pitfalls, but, more importantly, employ them in our business for greater efficiency and profitability.

David Kroutil founded Advantage Route Systems and served as CEO for over 30 years. He retired in 2024 with the merger of Advantage and Prism Visual Software. He continues to provide consulting services for dozens of retail propane companies throughout North America. Visit advantageroute.com.





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PROPER REEL MAINTENANCE KEEPS YOUR PROFITS FLOWING

The steps you can take to ensure your hose reel stays reliable & capable of weathering different environments

BY JENNIFER WING



Reel maintenance includes testing its operation, noting how smoothly the hose unwinds and retracts back onto the reel. *(Images courtesy of Hannay Reels)*

Propane delivery companies rely on LP gas hose reels every day to dispense fuel in a safe and efficient manner, helping you provide better service by deploying quickly and filling customer tanks effortlessly.

Mounted on the decks of bobtails and continuously exposed to the elements, hose reels must withstand the harshest conditions. Wind, rain, snow, ice, mud, road salt, pollen, dust and grime take their toll on reels year-round.

Hose reels also have many moving components, making them susceptible to wear and tear from weather, dusty and muddy customer sites, rough handling, mechanical friction, extreme temperatures and pressure, and simple everyday use.

Together, these conditions can take a toll on bearings, swivel joints, chains, bolts and other internal components, causing permanent damage to the reel and requiring major repairs or replacement.

Implementing consistent maintenance practices can help you extend the lives of hose reels, reduce downtime, minimize costly expenses and prevent further issues down the road. Additionally, proper maintenance checks ensure worker safety and make refueling stops more efficient.

REGULAR REEL MAINTENANCE KEEPS THE FUEL FLOWING

There are simple steps you can take to keep your hose reel working day after day. Make a quick visual inspection of the reel a part of your daily routine. Confirm that all connection points are snug, including the nozzle to the hose, the hose to the reel and the reel to the deck of the bobtail.

To verify the reel itself is mechanically sound, you should make sure the frame is structurally stable and all visible bolts are fastened properly. It's also important to carefully inspect the reels to pinpoint any corrosion or abrasion that may be occurring.

You should also test the operation of the reel, observing how smoothly the hose unwinds from and retracts back onto the reel. Excessive friction when unwinding and rewinding the hose reel means individual components need to be addressed.

EXAMINING THE SUM OF ITS PARTS

Not only should you examine the overall performance of your hose reel, you should pay close attention to all key parts that contribute to safe, effortless operation.

Bearings support smooth, low-resistance unwinding and rewinding while fortifying the axle and managing high pressures; they should also be periodically maintained with a proper lubricant. It's time to replace the bearings when the reel encounters significant resistance, makes a grinding or squealing noise, or vibrates excessively while rotating.

Chain and sprockets on power rewind reels are key to a reel working when needed. Rusted or corroded links and excessive slack are causes for concern. The chain may need to be replaced if the reel jerks when used or makes excessive noise.

Some fuel reels are available with a spring-powered rewind, automatically extending and retracting the hose while maintaining tension for the hose to be locked at a desired length. Tension adjustment may be necessary at times, but it also may be time to replace the spring if the retraction is weak or tension is lacking after adjustments are made.



Hub greasing maintenance

Even bolts need to be regularly inspected and addressed. They're primarily used to securely mount the frame of the hose reel to the deck of the bobtail, but they also fasten various internal components within the reel assembly. Bolts must be checked regularly to ensure everything is tight and secure, and corroded bolts should be replaced immediately.

Check the swivel joint often on your reel, making sure it is in proper working condition. Always follow the manufacturers' recommendation on maintenance and lubrication.

It's important to note that hose reel parts should be maintained with approved lubricants and replaced with genuine parts from the reel manufacturer. High-performance reels are precisely designed, custom-manufactured and extensively tested to maximize the performance and life of your reel.

PROPER MAINTENANCE STARTS WITH BUYING THE RIGHT REEL

While regular maintenance can extend the life of your hose reel, selecting a reel built for rugged use initially can help minimize the service it needs over a lifetime.

Not all hose reels are made the same, so you should select a reel specifically engineered for your fuel delivery operations. Standard reels are made of steel, but aluminum or stainless-steel options are available for highly corrosive environments.



Bolt tightening maintenance

For reels with chain drives, optional guards are available to protect the chain from the elements and operators from an injury.

By taking a few simple measures, you can improve performance and extend the lifetime of your fueling reel. Your entire business flows through it, so proper maintenance not only saves money on repairs and replacements but also reduces downtime that can impact your profits.

Jennifer Wing is the marketing manager at Hannay Reels. Hannay Reels is a manufacturer of durable hose and cable reels for both OEM and aftermarket applications, offering thousands of standard models, along with a wide range of custom-design capabilities. Hannay's manufacturing techniques, quality, service and value have solidified its reputation for helping companies around the world improve the productivity, efficiency and safety of their operations since 1933. Visit hannay.com.



GETTING PROPANE ENGINES ON THE ROAD IN INDUSTRY FLEETS

Nexio's bobtail adds new potential for the adoption of propane-powered engines

BY JESSICA GRAHAM PHILLIPS

IMAGE COURTESY OF NEXIO



The propane delivery sector is no stranger to the topic of propane-powered fleets, and part of the ongoing discussion is wider adoption within the industry. Every propane company has different needs, but some are considering the benefits of demonstrating propane's value and environmental friendliness through powering their own fleets by the very fuel they sell.

With these discussions come new ideas and innovations to consider while making decisions for the future. To give an understanding of the benefits of these offerings and learn how they're of value to the industry, Jeremy Lessaris, chief marketing officer for Nexio, shared about the company's propane-powered bobtail — not only about the product itself but also how the industry can embrace sustainable solutions and provide examples to consumers about propane's vitality in the U.S. energy mix. Lessaris oversees brand strategy, commercial positioning, marketing and communications for Nexio with a focus on aligning the company's performance, economic and emissions advantages with fleet adoption.

Nexio's propane-powered bobtail is a commercial truck designed exclusively for propane. The company designed and manufactured a 7.2-liter supercharged propane V8 engine — not converted or retrofitted, but engineered for propane.

"The goal was to deliver a truck specifically engineered for propane fleets that meets the performance, safety and reliability standards commercial operators demand," said Lessaris. "That meant designing a clean-sheet chassis purpose-built around propane propulsion and vocational duty cycles. The powertrain is a dedicated propane architecture from block to valvetrain, with LPG-specific cylinder heads, specialized valve materials and hardened valve seats for propane longevity, and a proprietary liquid propane injection system."

According to Lessaris, Nexio CEO Gary Winemaster and Chief Technology Officer Horace Mast saw an opportunity "to build a purpose-built propane commercial vehicle for an industry that already believes in propane as a fuel."

Winemaster and Mast spoke directly with propane marketers at industry events about their needs, pain points and what they wanted in a truck. This led to ideas like redesigning cab steps to be wider and extended out with more distance in between, as well as illuminated footwells and high-contrast grab handles.

"It's been an iterative process that was shaped by real-world feedback from the people who actually use these trucks every day: drivers, operators and service centers. The goal has always been simple — build not just what works, but what works best for the voice of the industry," said Lessaris.

This includes considering both safety and comfort for drivers — an aspect of utmost importance to vehicle manufacturers across the industry. In that regard, Nexio centralized its design philosophy around "Driver First" with the belief that when drivers perform better, fleets perform better.

"In an industry where experienced drivers are increasingly hard to find, giving drivers a truck that feels safer, quieter and easier to operate isn't just a feature — it's a competitive advantage for fleets," Lessaris explained.

Lessaris shared more about industry adoption of propane-powered fleets, as well as insights into Nexio's design development process, in the Q&A ahead.

WHERE DO YOU RATE THE CURRENT LEVEL OF USE OF PROPANE-POWERED BOBTAILS WITHIN THE INDUSTRY?

Historically, the propane industry has been almost entirely reliant on diesel for its delivery fleets. There have been previous conversions and attempts at alternative solutions, but

a purpose-built, OEM-manufactured propane bobtail has not been widely available commercially.

The economics alone make a compelling case: meaningful annual fuel savings compared with diesel, lower maintenance costs and simplified emissions systems. Add to that the sustainability alignment, the use of a domestically produced fuel and the fact that propane marketers would literally be delivering the same fuel their trucks run on, and the opportunity becomes clear.

We expect adoption to begin with fleets that recognize the strategic value early on. From there, growth will accelerate as the industry sees real-world performance data, service reliability and total cost-of-ownership results.

Our vision ultimately goes beyond bobtails. Across our Class 5 through Class 8 platforms, we see propane powering beverage trucks, box trucks, last-mile delivery vehicles and other commercial fleet segments. As those vehicles adopt propane, it naturally increases demand for the fuel itself — meaning more propane consumption, more deliveries and ultimately more bobtails on the road delivering it. In that sense, it creates a self-reinforcing cycle of growth for the entire industry. The propane industry should be at the forefront of that transition, and we intend to be the company that helps make it possible.

WERE THERE ANY CHALLENGES THE TEAM OVERCAME IN THE DEVELOPMENT PROCESS?

Building a new commercial vehicle from the ground up for the U.S. market is inherently challenging. However, this is not the first time our team has successfully introduced trucks and engines into the commercial market.

Throughout development, we have relied heavily on the voice of the industry — listening to propane marketers, operators and service professionals while incorporating lessons learned through demonstrations and testing. Challenges inevitably arise in a program of this scale, but we view them as opportunities to refine the product and ensure we are bringing the right solution to market.

It is also a long process, particularly as we work through certification to the 2027 Environmental Protection Agency (EPA) and California Air Resources Board (CARB) standards, which are among the most demanding regulatory requirements the industry has seen. But taking the time to get it right is critical. Our focus is on launching a platform that is fully validated, compliant and ready to perform reliably in real-world commercial operations.

WHAT MOMENTS STAND OUT AS VICTORIES FOR YOUR TEAM?

Several moments stand out to me. [The Propane Education & Research Council's] support for our EPA and CARB certification project is a significant milestone and an important partnership. It reinforces what the industry has been asking for and demonstrates a willingness to participate in bringing this solution to market.

The ride-and-drive events throughout 2025 have been incredible moments as well. Watching drivers who have spent years behind the wheel of diesel bobtails experience a Nexio truck for the first time and walk away genuinely impressed has been a huge moment for our team. Just as important, the feedback they've provided has directly influenced the evolution of the design. That kind of authentic, real-world feedback and validation is something you simply can't buy.

Along the way, we were also honored with the Global Technology Conference Innovation Award at Liquid Gas Week 2025 in Rio de Janeiro, hosted by the World Liquid Gas Association. Being recognized on a global stage among leaders from more than 70 countries reinforced that the work we're doing to advance propane-powered transportation resonates far beyond the U.S. market.

We also started on our Lufkin, Texas, manufacturing facility this year, which is more of a proud milestone for us. The new 36-acre site is expected to create more than 300 jobs and establish a long-term foundation for growth and manufacturing presence in the U.S.

WHY SHOULD MARKETERS & DISTRIBUTORS EMBRACE PROPANE-POWERED VEHICLES IN THEIR FLEETS? WHAT ROADBLOCKS EXIST TO WIDER ADOPTION?

It's important because it's the most authentic demonstration of the fuel the industry sells every day. If you promote propane as a clean, efficient, American-sourced energy solution, operating propane-powered delivery fleets reinforces that message. Every propane bobtail becomes both proof of concept and a visible endorsement of the fuel.

The business case is strong as well. Propane-powered trucks offer lower fuel costs, simpler emissions systems, reduced maintenance complexity, quieter operation and a vehicle purpose-built for the work propane marketers perform daily. It's not just good optics — it's good business.

As for adoption, there are a lot of hurdles anytime a new vehicle platform enters the market. Fleets are accustomed to existing equipment, service networks and procurement cycles. But those challenges are solvable, and the industry is already showing interest as people see the trucks operate, experience the performance firsthand and understand the long-term economics.

Many in the industry don't yet know that a purpose-built propane bobtail exists or that the underlying vehicle platform and propane engine architecture have proven track records in commercial service. Communication helps close that gap and raise awareness.

Nexio's job is to make the transition as frictionless as possible and prove that propane-powered fleets are not just viable, but a smart solution for the industry, today.

For more from Lessaris on sustainability in fleets, visit bpnews.com/propane-powered-bobtails.

Jessica Graham Phillips is the editor-in-chief of Butane-Propane News.

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PREVIEW:

NPGA'S 2026 SOUTHEASTERN & INTERNATIONAL PROPANE EXPO IS HEADED BACK TO NASHVILLE

Exhibitors weigh in on their prep work for the propane industry's most attended event

BY JOHNNY NICKEL

WHAT: 2026 NPGA Southeastern & International Propane Expo

WHEN: April 19-21

WHERE: Music City Center, Nashville, Tennessee

Register to attend at npgaexpo.org.

The 2026 Southeastern & International Propane Expo marks 78 years of the propane industry's most bustling event. In the past decade, the show has been on the road, rotating between its longstanding homes in the lively metros of Nashville, Tennessee, Atlanta, and Charlotte, North Carolina. This year, the industry returns to "Music City," where the cowboy boots of tourists clack on pavement in rhythm to country music cascading from honky-tonk bars — a fitting serenade for the event's theme of "Celebrating America's 250th."

According to National Propane Gas Association (NPGA) President and CEO Steve Kaminski, "There's no better place to celebrate America's 250th birthday than in Nashville this April."

But beyond taking in the fun spirit of the city, propane industry members will gather to take stock of the business. This includes product offerings, customer connections and professional relationships — as well as propane's place in an energy market that seems to change by the day.

"As America's energy landscape continues to evolve, propane remains a reliable, affordable, innovation solution," said Kaminski. "NPGA's Expo in Nashville will showcase how our industry is leading American energy forward — through safety, sustainability and smart growth."

Reliability: That's the word that continues to stand out for propane. The industry's unique value proposition to a constantly shifting energy field is a fuel that is stable and dependable, even in hard-to-reach areas.

As legal challenges, economic policies and international conflicts present modern challenges to propane, it is worth remembering that there is nothing ultimately new under the sun. Propane has always been an adaptive fuel source, fit to swoop in where other fuel solutions tap out. This year's NPGA Southeastern Expo will hold many surprises, but one thing will remain constant in this year's messaging: Propane has a large role to play in today's energy landscape.

To learn how exhibitors are preparing for this year's expo, BPN reached out to several sources to hear how their team is prepping for the industry's busiest event.

1. What are the main goals your team will focus on at the 2026 Southeastern Expo?

Jordan Gilland, business development at ADD Systems: We use the show to connect with current customers and potential prospects and showcase our latest software enhancements.

Jennifer Wing, marketing manager at Hannay Reels Inc: Our main goal is to connect with our customers. We have been exhibiting for 59 years and our reels have been a staple in the propane industry for even longer. We are always excited





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to display and promote new innovations and updates to our product line and also see what others have available to the industry.

Trent Bischoff, managing partner at B&A Energy Partners: Making connections with potential clients and reconnecting with industry colleagues.

Freddie Ridler, head of business growth at Rural Computer Consultants Inc: Our primary goal never changes from year to year: meaningful conversations with propane marketers about how technology can simplify operations and drive smarter decisions. That is a fancy way of saying listen first and understanding where companies are feeling pressure today! Once we know that, we can show practical ways our tools can help them. We are a trusted partner, not just a software provider!

2. This year's expo is returning to Nashville. What are you looking forward to about the location change?

Gilland: We love the large crowd that Nashville has drawn in the past. It's a fun city and leads to a happy atmosphere, ideal for opening yourself up to new ideas.

Wing: Nashville is always a fun town to visit — it's a nice, friendly town. We look forward to it every time we go there. And it also gives us a fresh look at a new region, which may attract a different group of attendees.

Bischoff: Nashville is a good spot that offers opportunities to connect with colleagues outside the main venue.

Ridler: Nashville brings a great energy that naturally encourages connection. It's a city people are excited to be in, which makes networking easier and conversations more relaxed. The centralized venue and walkable downtown also make it simpler to move between education sessions, the expo floor and after-hours events.

3. What's the planning process like for exhibiting at events like this?

Gilland: Our trade show team handles our show logistics to allow our sales team to connect with both clients and prospects. We set meetings with our clients and prospects at NPGA to better understand their changing needs and new challenges, and we look to share how ADD Systems solutions can help them meet those challenges and enhance their operations.

Wing: It is a group effort. We plan all our trade shows like that: We work as a team, taking turns walking the show floor, meeting with customers and answering questions as people stop by the booth.

Ridler: Planning starts months in advance and is very intentional. Each team member comes in with a clear role. Whether that's product demos, customer conversations, education sessions or relationship-building with partners, we stay very engaged with the entire event!

4. Describe the target customer you're hoping to connect with at this year's show.

Gilland: Our target customers are propane marketers and wholesalers looking to improve operational efficiency through integrated software solutions.

Wing: Our customers consist of both OEM truck manufacturers and the end user, so we enjoy seeing both. Talking with end users that use our product gives us feedback, and for our truck OEMs, sometimes it is the only opportunity to catch up with our long-time and new friends at the show.

Bischoff: We are a brokerage firm hoping to build relationships with potential long-term clients. We want to get to know those companies thinking about selling or needing guidance on how to get ready to sell.

Ridler: This also doesn't change from year to year for us. Our target audience ranges from current customers to brand-new leads, but at the end of the day, titles and company size don't matter much. If you're part of the propane industry and you have a story to share, we want you to stop by our booth. This industry has always been about relationships and storytelling, and that's especially true when it comes to the #makingpropanesexy stories celebrating what makes propane — and the people behind it — so special. While we really enjoy meeting new leads, we intentionally spend the majority of our time reconnecting with our existing customers and industry family. Those relationships are the foundation of everything we do, and the expo gives us a chance to strengthen them face-to-face.

5. What types of experiences are you planning to create at your booth to engage with customers?

Gilland: Our booth puts a heavy focus on creating an open space where we can have conversations with many different customers or prospects simultaneously. We'll be ready to discuss our solutions and offer a firsthand look at how we help clients run more efficiently while making more money.

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Wing: We are well known for the 'penny candy' we have brought and continue to bring to the show for over 50 years now! Attendees look forward to it every year. We create a place to stop and chat, enjoy some sweet treats and we do it as a thank you to the industry that has been so good to us.

Bischoff: We're there to meet anyone in the industry. These events are all about meeting people and building relationships.

Ridler: We focus on hands-on, conversational experience rather than scripted sales pitches. That includes live demos, real-world use cases and quick discussions centered around the actual challenges customers are facing.

6. How does your team navigate any challenges that may arise during trade show events?

Gilland: We want to make sure we're well-equipped to handle any number of people or challenges that pop up at our booth. This is an important show, so each year we bring a large staff that allows for discussions, demos and referral introductions, and we also try to plan for the unexpected.

Wing: We have to roll with the punches, as they say. Fortunately, there have not been too many challenges that arise at the show — it seems to run pretty smooth every year.

Ridler: Experience helps — 40 years exhibiting! When challenges come up, whether it's technical, scheduling or just a packed show floor, we lean on communication and teamwork. Everyone is empowered to step in, problem-solve and support one another. Staying calm, flexible and focused on the customer experience always keeps us moving forward.

7. How do you balance your time between pursuing new engagement with your brand and maintaining existing relationships with partners at the expo?

Gilland: Having many account managers at the show allows us to serve both customers and prospects. Often, account managers find themselves conversing with the accounts they manage, while those available can help any incoming prospects. These shows are also a nice opportunity to connect our clients with prospects, giving them the opportunity to hear firsthand how ADD Systems is making an impact.

Wing: Well, it gets busy at times serving up the candy, but we make sure to take a walk around the exhibit floor and stop in to talk with customers. We also encourage anyone to stop by the booth and discuss new projects and products; this allows them to offer new ideas on improvements.

Bischoff: We engage with anyone that is present and stops by, as well as managing relationships with off-site meals and activities.

Ridler: It's a balance we're very intentional about. We schedule time to reconnect with long-time customers and partners because those relationships matter deeply to us. At the same time, we leave space open for new conversations and unexpected connections. The expo is one of the few places where both can happen naturally in the same day.

8. In your experience, what is the most valuable aspect of exhibiting at the Southeastern Expo?

Gilland: The NPGA Expo is the one propane show that has it all. We're able to meet with customers and prospects from all over the country while presenting and attending some of the best educational sessions of the year.

Wing: Connecting with the industry — truck builders, end users and all the other industry companies exhibiting — to learn about and keep up to date on industry changes and challenges.

Bischoff: It allows us to physically be in front of people that we may otherwise only be able to reach by phone or email.

Ridler: The people. The Southeastern Expo brings together the propane industry's decision-makers, innovators and next-generation leaders all in one place. It's where ideas are exchanged, partnerships are formed and the future direction of the industry starts to take shape. That concentration of knowledge and experience is incredibly valuable.

9. How might political and legislative shifts from the past year affect the energy of the expo?

Gilland: With the price of energy being so volatile, it's more important than ever to make sure you have operational efficiency. This is what we excel at.

Wing: Most industry professionals are pretty passionate: Recent propane-related political and legislative news seems to be ever changing, depending on the state you are in. It may fuel some great conversations.

Bischoff: In our segment of the business, there is little effect. The only thing that can impact us may be tightening of legislation and regulation and how that affects the thought process for independents.

Ridler: That is a great question. And honestly, I feel like that will organically be answered at the expo itself. But if I had to

weigh in on that conversation, I would say they always influence conversations at the expo. That has never changed. Our industry stays focused on resilience and long-term planning.

10. What is the most important benefit the expo provides to the industry as a whole?

Gilland: This show provides a lot of industry insight through the many sessions. NPGA does a great job of keeping exhibitors and attendees informed on the various legislative changes and industry trends.

Wing: Being able to gather in person to discuss the challenges, innovations and industry as a whole.

Bischoff: It allows a space for industry folks to converge in one place and trade ideas and thoughts and potentially offer a space for future business partnerships.

Ridler: The expo provides a shared space for the industry to come together. It's not just about products; it's about alignment, learning and community. Just as important, it creates a platform for storytelling, where propane professionals can share experiences, lessons learned and the real stories behind their businesses. Those conversations, whether they happen on the show floor, in education sessions or between long-time industry friends, help build collective momentum.

Years Exhibiting at the NPGA Southeastern Expo:	
ADD Systems	*35*
B&A Energy Partners	*2*
Hannay Reels Inc.	*59*
Rural Computer Consultants Inc.	*40*

NPGA Southeastern Convention & International Propane Expo

Marketing That Works:

Real Strategies from Propane Marketers

Sunday, April 19 | 10:30 AM



David O'Connell
Wilson Oil & Propane



Scott Prewitt
Blossman Gas



Kyle Price
Davenport Propane



Moderated By Ben Gutkin
Warm Thoughts Communications

Leading propane marketers discuss how they're attracting customers and improving marketing performance in today's market.

Continue the conversation at **Booth #617**

WARM THOUGHTS communications
Breakthrough Marketing

201-330-9276

Websites • Social Media • Review Management
Online and Traditional Advertising
Sales and Customer Service Training

warmthoughts.com



2026 NPGA Southeastern Expo **Product Showcase**

The products & services you don't want to miss at propane's largest trade show

By BPN Staff

The National Propane Gas Association's (NPGA) Southeastern & International Propane Expo proves every year to be the place for the industry to converge, connect, learn and explore. The 2026 Expo is no different, with companies filling the exhibit hall with products and services designed to help you do business. This special product showcase is your guide to preview what these companies will exhibit this year in Nashville, Tennessee.



ADD SYSTEMS
Comprehensive Propane Software Solutions

Booth 607

addsys.com

ADD Systems offers back-office and mobile software for the propane industry. Focused on efficiency and profitability, ADD Systems' solutions enable businesses to do more without expanding headcount. The company's software was developed specifically for propane operations, with additional modules available to serve diversified operations, including wholesale fuel, fleet fueling, cardlock, lubricants, convenience stores and more.

- Boost delivery efficiency with forecasting, tank monitors, optimized routes and mobile devices
- Maximize service efficiency with smart service dispatching, mobile devices and gas check
- Give excellent customer service via a dashboard with full visibility
- Control your tank inventory with streamlined asset tracking
- Increase profit with flexible pricing, built-in credit and budgets, and profitability analysis
- Gain complete business insight and make informed decisions with powerful reporting



ANOVA
ANOVA UTM

Booth 747

anova.com

Smarter monitoring. Simplified operations. The Anova Universal Tank Monitor (UTM) gives you complete visibility and control — anytime, anywhere. Easy to install and built to last, it provides accurate GPS positioning and multisensor monitoring for up to two tanks with a single device. Enhance safety, boost efficiency and connect seamlessly with any tank or software system.

- Universal SIM supports multiple cellular networks
- Multiple inputs support a range of sensors, including tank level, pressure, meters and others
- Easy installation with magnetic or 3M dual lock mounting options
- Rugged, sealed, all-weather construction, C1/D1 and ATEX compliant
- Seamless integration with supply chain ERP software
- Daily reporting with configurable alarms



ALLIANCE AUTOGAS
Toyota Camry Hybrid 2.5L

Booth 653 (Autogas Pavilion)

allianceautogas.com

Toyota Camry Hybrid 2.5L equipped with an Alliance AutoGas-engineered, EPA-certified bi-fuel system. Delivering fuel savings and dependable performance.

- EPA-certified bi-fuel system
- Torodial LPG tank (concealed in spare tire)



AULTRA TANK & EQUIPMENT LLC
Propane Tank Refurbishment

Booth 810

aultratank.com

Extend the life of your propane tanks with Aultra Tank & Equipment's professional tank refurbishment service. The company inspects, cleans, sandblasts, repaints and installs new valves to ensure safety, performance and compliance. In addition to refurbishing your existing tanks, Aultra Tank also offers quality refurbished propane tanks ready to add to your inventory — providing a cost-effective, reliable solution to meet growing demand.

- Refurbished propane tanks and propane tank refurbishment services for tanks ranging from 120 gallons up to 1,000 gallons



BERGQUIST INC.
The JuiceBox Mobile Power Unit

Booth 327

bergquistinc.com

Designed to deliver consistent, reliable power, the JuiceBox ensures you stay prepared for winter storms and unexpected outages. It uses propane and is low maintenance, simple to operate and easy to transport wherever it's required.

- Easy to operate and transport
- Reliable
- Quiet operation
- Low cost of operation
- Connected with remote monitoring and analytics

BASE ENGINEERING
ProControl 2S

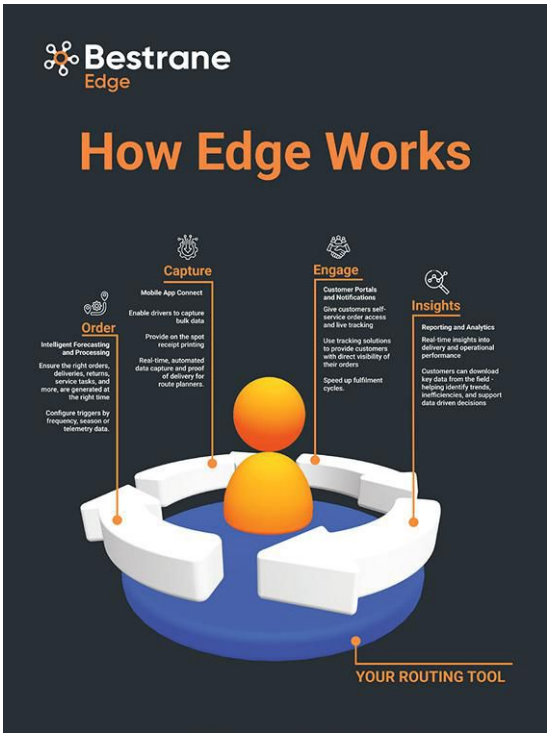
Booth 548

baseng.com

Rugged, reliable and built for operators, the ProControl 2S blends the form factor that operators love with the advanced features needed for safe, efficient payload and delivery control. Integrated with the BASE Long Range radio and backed by the BASE after-sales support the industry has come to expect.

- Payload and delivery control, including E-Stop
- 12-button, configurable controls
- 2.5" high-resolution display for payload information
- Optional RFID or barcode reader
- User-replaceable battery and USB-C charging
- Enhanced range and reliability with new long-range radio





BESTRANE
Bestrane Edge

Booth 227

bestrane.com.au

Bestrane Edge is delivery operations technology that integrates with your existing routing system to connect and forecast orders, capture field data, enable customer communication and deliver operational insights. By bridging the gap between planning and execution, Edge helps organizations gain real-time visibility, improve delivery accuracy, optimize fleet utilization and reduce operational costs across complex delivery environments such as energy, fuel distribution and health care logistics.

- *Orders* — Forecasts and generates optimized delivery orders directly into your routing system using configurable triggers.
- *Capture* — Connects mobile applications with field devices and meters to capture real-time delivery data and automate proof of delivery.
- *Engage* — Provides customers with real-time delivery updates, notifications and self-service visibility into orders before, during and after delivery.
- *Insights* — Delivers real-time reporting, dashboards and analytics that give operations teams clear visibility into delivery performance and operational trends.
- *Premium service bundle* — Provides ongoing access to Bestrane experts who help tune, support and continuously improve routing and Edge workflows.



BLUE PEAK RESOURCES
Merger & Acquisition Consultants

Booth 1150

bluepeakresources.com

Blue Peak Resources represents propane and fuel-oil businesses exclusively in mergers and acquisitions (M&A). The team's senior consultants are propane founders themselves, so they understand the seller's mindset — not just the buyer's tactics. They prepare, position and manage transactions to protect value, preserve confidentiality and maintain negotiating leverage. The process begins with a confidential seller readiness review — not a listing.

- Seller-only representation — Blue Peak Resources never represents buyers
- Propane and fuel-focused consulting — not a generalist M&A firm
- Strategic positioning of gallons, EBITDA and risk before market
- Structured buyer outreach that protects confidentiality
- Proactive diligence management to protect pricing and terms
- Senior-led transactions from first conversation through closing



CARGAS
Fuel Delivery & HVAC Software

Booth 1147

cargasenergy.com

Cargas Energy's software and mobile applications help accurately predict customer fuel usage to optimize drops, filter tickets to avoid missed deliveries and streamline routing to deliver more gallons in fewer miles. Cargas' solutions and services support your business from end to end, from delivery operations and accounting to sales and marketing. Stop by the team's booth for a live demo of their latest features.

- Fuel delivery
- HVAC service
- Customer service
- Cylinder exchange
- Wholesale delivery
- Fleet fueling
- Point of sale
- Payment processing
- Texting
- Custom forms
- MyFuelPortal

CETANE ASSOCIATES
The Turtlebox Ranger Speaker

Booth 401

cetane.com

Visit Cetane Associates' booth and drop your business card in the fishbowl for a chance to win a Turtlebox Speaker. Built for life-on-the-go, this portable speaker delivers bold sound and endless versatility. Engineered for the outdoors.

- Drop-, crush- and dust-proof
- Waterproof
- Magnetic side mounts
- 12-plus hours of battery life
- Bold sound





EVAS EV ALETLERİ SAN. A.Ş.
Propane Tanks

Booth 213

evas.com.tr

EVAS offers a comprehensive range of high-quality LPG cylinders designed for camping, domestic and industrial use. EVAS' products are available in 20-, 30- and 100-pound capacities, manufactured in strict compliance with DOT specifications, ADR regulations and specific international standards.

- *Standard capacities:* available in 20-, 30- and 100-pound models
- *Versatile application:* ideal for camping, household and industrial use
- *DOT-certified:* fully compliant with U.S. Department of Transportation standards
- *Customized production:* manufactured to meet specific regional standards
- *Safety first:* rigorously tested for maximum durability and security
- *Durable design:* built with high-grade materials for long-term reliability

EMERSON FISHER LP GAS EQUIPMENT
Fisher LP-Gas Bites

Booth 901

go.emersonautomation.com/na-lpg

Check out this series of quick, engaging videos packed with insights about everything Fisher LPG Equipment and the propane industry. These video shorts are designed to make learning fun and easy while equipping you with valuable knowledge and resources. Two new shorts release each month. Released videos can be found at youtube.com/@emersonregulators/shorts.

Each video short will dive into one of the five key catagories:

1. Product highlights
2. Tools and resources
3. Education
4. Behind the build
5. History

FISHER LP-GAS bites



FAIRVIEW USA INC.
Gas-Flo 360 Domestic Regulators

Booth 715

fairviewfittings.com

Simple: Gas-Flo 360 Domestic Regulators replaces multiple LP gas regulators. Safe: Lockable orientation prevents tampering. Smart: Bonet rotates a full 360 degrees to allow multiple vent orientation.

- A redesigned diaphragm that delivers higher Btus, even at low temperatures
- Enhanced Inlet filter and new ergonomic pressure adjustment movement
- 360 regulator replaces up to four regulators in your inventory
- 10-year warranty
- Patent pending



FELKER TRUCK & EQUIPMENT INC.
Propane Bobtails/Refined Fuel Trucks

Booth T236, T244

felkertruck.com

Custom-built propane bobtails and refined fuel delivery trucks built with state-of-the-art equipment to fit your company's specific needs. Offering a complete line of high-quality components to include:

- BASE Engineering
- Liquid Controls
- Corken
- Blackmer
- Marshall Excelsior
- RegO
- Hannay Reels
- Therma-Flow
- Betts Lighting
- On-Spot Tire Chains
- RC Toolboxes
- And many more

FISK TANK CARRIER
Tank Jak

Booth T1021

fiskinc.net

The Tank Jak by Fisk Tank Carrier is a must-have tool for propane tank maintenance. Designed for one-person use, the Tank Jak makes it easy to efficiently paint, level or complete other propane tank maintenance requirements. Perform tank maintenance without calling a tank carrier.

- One person can easily lift tank for maintenance
- Eliminate the need for a tank carrier on-site
- Padded boot prevents scratching
- Lift end up to 14 inches
- Made of quality aluminum by Fisk







FULL-CIRCLE
Stainless Steel Swivels for Railroad Loading Arms

Booth 816

fullcircleswivels.com

Engineered to withstand the harshest conditions, Full-Circle swivels offer long-term reliability and low upkeep. Full-Circle's "SS" stainless steel swivels are built to perform in the toughest environments, including railroad loading systems regularly exposed to moisture. This unique design enables full 360-degree pipe rotation, ensuring reliable performance that meets and exceeds operational demands.

Features include:

- Stainless steel casings
- Corrosion-resistant seal package held together by system pressure, allowing for ease of rotation
- No wearing O-rings, lip seals or disc seals
- High load ball bearing
- Maintenance-free design, allowing for zero lubrication or greasing
- Available in 1 1/2- or 2-inch FNPT sizes in 90-degree or straight-through configurations
- UL listed, CE and UKCA compliant



H&H SALES COMPANY INC.
H&H Sales Crane/Service Truck

Booth T1208

hhsalescompany.com

H&H Sales Company built 14'-long crane/service truck mounted on 2024MY Ford Model F-600 4x4 chassis. H&H Sales Company has served the propane gas industry since 1951 with custom-built truck bodies and material handling equipment.

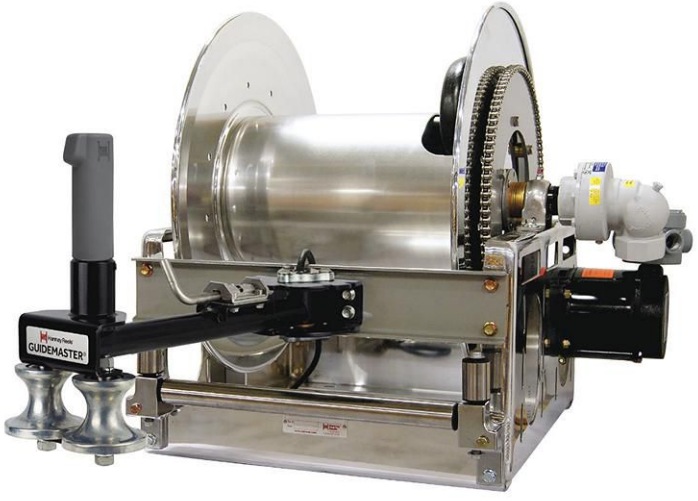
HANNAY REELS INC.
Hannay LP Gas Reels

Booth 916

hannay.com

Hannay's premier LP gas reel, model SBPBGMB, will be on display at the NPGA Southeastern Expo. The industry standard in LP gas reels — polished aluminum construction to withstand the elements. Hannay's patented Guidemaster rewinds hose faster and safer and has five locking positions to pull hose out and away from the deck, making it easy to use at every angle.

- Polished aluminum construction offers reduced weight and superior corrosion resistance compared to standard steel construction
- Choose #40 chain and sprocket drive powered by an electric, hydraulic, compressed air or direct drive hydraulic rewind motor
- *Standard inlet:* 90-degree ball bearing swivel joint with 1 1/2" female NPT threads
- *Standard outlet:* flanged riser with 1" female NPT threads, and will hold up to 200 feet of hose depending on model size
- Guidemaster is standard with wear-resistant ZAMAK rollers, a weather-resistant cover with push lever and a durable one-piece weldment with bearings on the top and bottom of the yoke with dust caps to limit dust and dirt intrusion





HILTZ PROPANE SYSTEMS
30,000-Gallon Skid

Booth T1163

hiltzpropanesystems.com

Hiltz Propane Systems' 30,000-gallon skid propane system delivers high-capacity storage in a compact, transportable design. Built with integrated piping, valves and regulators, it allows for efficient installation and reliable performance. Ideal for agricultural and industrial applications, each system is engineered for durability, safety and long-term propane storage efficiency.

- 30,000-gallon storage capacity
- Multiple load points for efficiency
- Strategically designed piping system that allows for other auxiliary use

JOMAR VALVE
Propane Truck Valves & Mating Flanges
Booth 722

jomarvalve.com



Jomar's extensive propane truck valve lineup is now available with all new mating flanges. Designed to simplify connections, reduce leak points and streamline operations, Jomar's innovative solutions are designed to enhance your fleet's performance and guarantee quality where it matters most.

- Stainless steel and carbon steel ball valves
- 3-piece, 4-bolt, swing-out body
- Full port, 1,000 WOG, 100% repairable, 100% flow
- NPT and socket weld connections
- Multiple end configurations available
- Type A and B mating flanges

LEGACY ENERGY CONSULTING
Mergers & Acquisitions, Strategic Planning Services
Booth 409

legacyenergyconsulting.com

Legacy Energy Consulting specializes in mergers and acquisitions and strategic planning services. Whether you are ready to sell your business or are in it for the long haul and need an experienced partner to help you get there, Legacy Energy Consulting can help.

- Business valuations
- Seller representation services
- Strategic planning services

LIN'S PROPANE TRUCKS
Fully Lowered Deck Propane Delivery Truck
Booth T1201

linspropanetrucks.com

Since 1980, Lin's Propane Trucks has engineered fully lowered deck propane delivery trucks designed by people who delivered gas first. The company's complete deck-lowering design improves driver safety, stability and efficiency while maximizing payload performance. Built with premium craftsmanship and real-world field experience, Lin's trucks are designed to work smarter, safer and longer.

- Fully lowered deck design
- Driver-informed layout for operational efficiency
- Heavy-duty construction built for long-term durability
- Custom-engineered builds tailored to fleet needs





MANCHESTER TANK
ELG Gauges — 420-Pound & HLP Tanks
Booth 1137

manchestertank.com

Introducing ROTAREX Electronic Capacitance Gauges, now standard on all 420-pound and horizontal tanks. Continuous, accurate propane readings with no moving parts, and no more stuck gauges. After 80 years of quality tank manufacturing, Manchester Tank is proud to set a new standard for reliable readings. Welcome to the future of tanks.

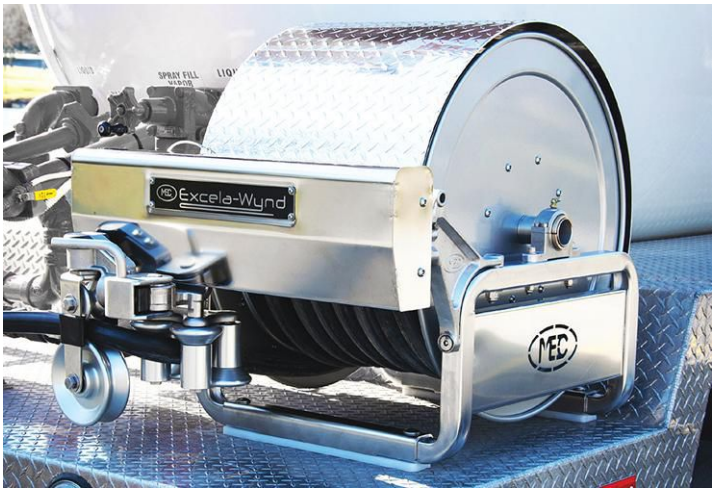
- *Digital precision:* accurate, real-time level information through capacitance measurement
- *Zero maintenance:* sensor design without moving parts
- *Wireless monitoring:* Bluetooth-compatible connectivity enables remote access via smartphone and/or third-party gateways



LUX INDUSTRIES
Propane Bobtail Truck Builder
Booth T1447
lux1075.com

Lux Industries builds propane bobtails with efficient, performance piping systems designed to reduce downtime and have fewer leak points, maximum flow and reliability. Built to withstand every climate from extreme cold in Alaska to intense heat in Texas and corrosive, salty coastal environments. Every unit is built in accordance with state and federal regulations.

- Efficient piping design
- Welded flanges
- Sweep bends for maximum flow
- Rockguard barrel protection
- Trim lock seal
- Waterproof power hub
- Protective taillight housing



MARSHALL EXCELSIOR CO. (PART OF OPW PROPANE ENERGY SOLUTIONS)
Excela-Wynd Hose Reel
Booth 637
marshallexcelsior.com

The Excela-Wynd Hose Reel is designed to provide increased delivery efficiency and safety while reducing downtime, compensation claim injuries and driver fatigue. The Excela-Wynd Hose Reel incorporates a gear drive system, eliminating the chain drive and reducing downtime. Fully compatible with the BASE ProControl3 remote to control reel-in and reel-out functions and features a variable speed controller to maintain safe and consistent walking speed to and from the delivery truck.

- Adjustable speed to suit driver preference or seasonal conditions
- Auto-push feature takes the starting hose pull effort off the driver
- Premium construction and materials for increased service life
- Gimbal roller assembly significantly reduces pulling effort
- Designed for minimal maintenance and ease of serviceability



METSA
AG/UG Dome
Booth 423
metsa.com

Constructed from flame-retardant, high-density polyethylene (HDPE), the Metsa Tanks AG/UG Tank Dome protects valves and equipment on underground propane tanks. Its durable, weather-resistant design provides secure access and fits most manufacturers' tanks, supporting safe, reliable operation across a wide range of installations.

- Flame-retardant, high-density polyethylene (HDPE) construction
- Protects valves, regulators and monitoring equipment
- Weather-resistant for long-term underground durability
- Universal fit compatible with most manufacturers' tanks
- Integrated lid design allows secure, convenient access
- Engineered for safe, reliable field performance



MID:COM
E:Count LTIS

Booth 705

midcomcorp.com

A Class I, Div 1 standalone electronic register. The E:Count LTIS replaces hundreds of moving parts found in a mechanical register, resulting in a low-maintenance alternative. It includes electronic automatic temperature compensation (ATC) that fulfills the Handbook 130 regulation mandated for 2026. It is a 120/240 VAC, designed for stationary applications like propane dispensers, bulk plants and industrial applications.

- Electronic temperature compensation
- Smaller footprint than a mechanical compensator
- More accurate — volume in 100ths
- Less maintenance — only one moving part
- Automated pump and valve control
- Best choice to connect to fuel management systems

MOPEKA PRODUCTS
Mopeka GaugeLink — BLE & Cellular

Booth 217

mopeka.com/mopeka-gaugelink

Mopeka GaugeLink transforms traditional mechanical tank gauges into smart, connected monitoring systems. With simple snap-on installation and no tank modification required, GaugeLink provides accurate tank level visibility using Bluetooth or cellular connectivity. Monitor tank levels, system status and critical data from anywhere through the Mopeka Dashboard or MopekaIOT Co-Pilot App — delivering reliable monitoring built on Mopeka's promise of "Accuracy Above Everything."

- Turn any tank gauge into a smart monitor
- Works with existing JR and SR gauges
- Simple snap-on, noninvasive installation
- Bluetooth or cellular connectivity options
- Real-time tank level visibility
- Up to 10-year battery life



NATIONAL INTERSTATE INSURANCE
LP Operations Insurance

Booth 444

natl.com

Since 2004, National Interstate has offered a variety of insurance solutions tailored specifically for liquid propane distributors. The National Interstate team operates through an open broker network, seeking opportunities to insure top-tier operators with three or more units. The company provides an array of distributor insurance options, from first dollar policies to innovative risk management solutions that give you greater control over insurance costs and risk.

Insurance coverages for propane transportation:

- Automobile liability
- General liability
- Workers' compensation
- Auto physical damage
- Property and inland marine
- Excess liability

ONE-TANK
Pulse Monitoring System
Booth 437

one-tank.com

Pulse gives you dependable satellite visibility across every tank and the foundation for virtual metering. You eliminate coverage gaps and gain consistent, portfolio-wide data. That data powers more accurate forecasting, fewer runouts, optimized delivery planning and a clear move beyond monitoring into true operational control.

- Satellite connectivity eliminates dependence on cellular coverage
- Consistent tank level data, even in rural and low-signal areas
- Portfolio-wide visibility that reduces runouts
- Accurate, timely readings that support smarter delivery planning
- Built to enable scalable virtual metering strategies
- Designed to move operations beyond monitoring and into greater control





NEXIO POWER INC.
Nexio Trucks
Booth 759

nexiotrucks.com

Nexio trucks are purpose-built commercial vehicles powered by propane and alternative fuels, designed for lower emissions, improved safety and reduced operating costs compared to diesel. The advanced chassis and propane engines help fleets transition to cleaner, sustainable transportation without sacrificing performance or reliability.

- Purpose-built 7.2L supercharged propane V8, delivering 775 lb-ft of diesel-competitive torque
- Better emissions with simplified emissions architecture as compared to diesel, no DEF, no DPF, no regen
- WorkReady chassis with lower center of gravity and optimized load balance
- Cab-over ClearView design for superior visibility and tighter maneuverability
- IntelliSafe advanced driver assistance engineered to higher European GSR2 standards
- Lower fuel, lower maintenance, lower total cost of ownership, ready for fleets today



OTODATA
TMaaS (Tank Monitoring as a Service)
Booth 1155

otodata.com

Experience a full, turnkey tank monitoring solution with no upfront cost and maximum return on investment. Otodata manages everything, from deployment to long-term performance — ensuring reliable, end-to-end tank monitoring.

Otodata's TMaaS program includes:

- No upfront cost
- Hardware rental
- Installation and maintenance included
- Connectivity and real-time monitoring
- Extended seven-year warranty
- 24/7 ongoing technical support
- Unlimited reporting
- Technology upgrades

PROCONTROL 2S

Rugged. Right sized.
BUILT FOR OPERATORS.

2.5” high resolution LCD display

Refined design for single-handed operation

Payload and delivery control, including E-Stop

Rechargeable, user-replaceable battery with USB-C charging



Optional RFID or barcode reader

Enhanced range with new long-range chipset

12-button, configurable controls

BASE ENGINEERING
PART OF OPW a DOVER company

Contact your sales representative, call 1-800-924-1010, or email sales@baseng.com for more information.

BASE Long Range

COMPATIBLE WITH DIAMOND INTEGRATED FUELING SOLUTION

www.BASEng.com

COUNT ON US

P3 PROPANE SAFETY
P3 Compliance System
Booth 404

p3propane.com



The P3 Compliance System, which is endorsed by NPGA, is a safety documentation and compliance software program that enables propane marketers to store, retrieve and analyze important safety inspections for accuracy, completion and compliance. The P3 dashboard, photo review process, mobile safety inspection and compliance reporting are revolutionizing how marketers manage this important field safety documentation and compliance data.

- Mobile safety inspection with self-auditing fields
- Bulk plant inspections and reporting
- Integrations with back-office software partners
- On-site safety and compliance training



PACIFIC TRUCK TANK
Propane Truck
Booth T344

pacifictrucktank.com

From the chassis to the components, every propane delivery unit is custom-built to fit the needs of your business. Pacific Truck Tank has manufacturing capacities in London, Ontario, Canada and Sacramento, California.

PDI TECHNOLOGIES
PDI Propane & Commercial Fueling (PCF)
Booth 1128

pditechnologies.com

Running a successful propane and fuel oil business is simpler and more efficient with the powerful, energy-specific Propane and Commercial Fueling suite of software from PDI Technologies (heritage Blue Cow Software). Leverage intelligent fuel oil and propane delivery software from PDI that helps your team optimize your business all the way from the back office to customer deliveries.

- *PDI PCF ERP:* Streamline operations with all-in-one energy software combining delivery routing, CRM and accounting to boost profitability.
- *PDI PCF in-truck:* Optimize deliveries and scale profitability with reliable dashboards for service dispatch teams.
- *PDI PCF mobile app:* Give customers secure mobile access to account info, fuel ordering, payments, equipment and service requests.





QUALITY STEEL CORP. & LP CYLINDER SERVICE INC.
New & Refurbished Products
Booth 823

qualitysteelcorporation.com

Quality Steel and LP Cylinder manufacture, refurbish and deliver aboveground and underground propane, ammonia and dispenser tanks; pressure vessels; and plastic lids/domes. The tanks are manufactured in three facilities across the United States, and LP Cylinder Service refurbishes and recertifies tanks and cylinders in Shohola, Pennsylvania. With the companies' tanks, you get an experienced sales and customer service team.

DIESEL PERFORMANCE PROPANE ECONOMICS

NEXIO DELIVERS DIESEL-LEVEL PERFORMANCE WITH PROPANE-POWERED ECONOMICS, ADVANCED SAFETY, AND ULTRA-LOW EMISSIONS. NEED ANOTHER REASON?



- POWER? PROVEN
- SAFETY? SMARTER
- COSTS? CUT
- EMISSIONS? EVISCERATED

NEXIO

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QUALPAY
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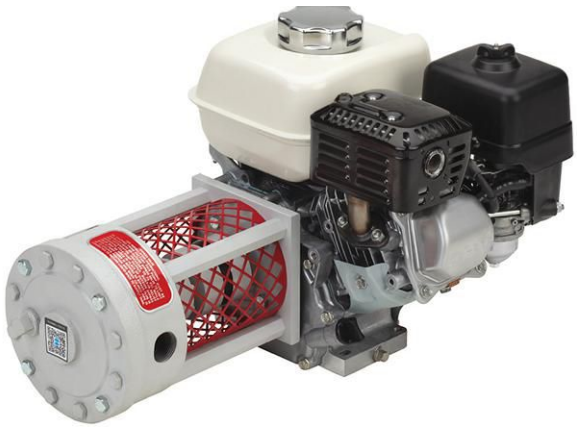
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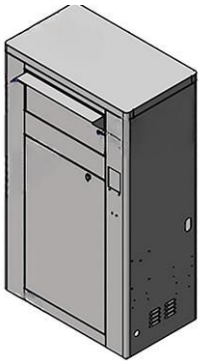
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SUPERIOR ENERGY SYSTEMS
Next Generation Propane Autogas Dispenser

Booth 541

superiornrg.com

Superior Energy Systems will debut its newly designed and reconfigured propane autogas dispenser at the 2026 NPGA Southeastern Expo. Drawing on decades of hands-on fleet experience, Superior Energy Systems transformed its previous model with a modernized look and innovative new features that enhance performance and user convenience. Built using direct feedback from customers, this next-generation dispenser delivers smarter, more efficient fueling solutions.

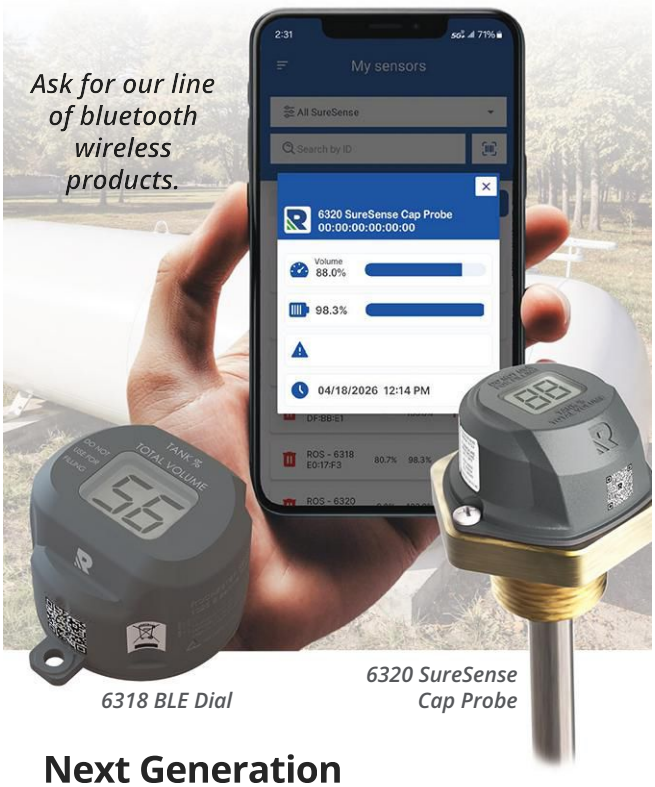
This next generation of refueling offers:

- Improved safety due to cabinet configuration
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Doug Tascarella

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Warm Thoughts Communications (WTC) specializes exclusively in marketing for propane and fuel retailers nationwide. Across its client network, WTC analyzes millions of impressions, website visits and customer interactions yearly, translating homeowner behavior into actionable strategy. With more than three decades serving the energy industry, Warm Thoughts combines industry knowledge with digital and traditional execution to improve customer acquisition, retention and long-term growth.

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THE FIRST THING you see on Quality Propane's website is the phrase "Where Every Customer Counts." Quality Propane places great importance on prioritizing its customers' needs to keep them warm year-round. The company accomplishes this through a dedicated team both in the office and out in the field — sometimes (as you'll see in the Q&A ahead) going above and beyond the typical job requirements to provide personalized assistance to those they cross paths with. At BPN, we're always inspired by the way companies in this industry treat customers like the humans they are. It's a trait that sets the propane industry apart from so many others. Jonathan Malazzi, owner of Quality Propane, shared with us how Quality Propane is meeting and exceeding the friendly and responsive reputation the propane industry is known for.

Can you tell us about Quality Propane's company history?

Since opening its doors in 1990, Quality Propane has set the standard for propane companies in Connecticut. Being one of the first full-service propane and heating oil dealers in the state, we are small enough to provide exceptional customer service but large enough to be able to handle every customer's propane needs. With 240,000 gallons of overall storage and two locations — one in Clinton and the other in North Stonington, Connecticut — we can assure our customers of a constant supply of propane regardless of market conditions. We have a continually growing fleet of over 80 vehicles from delivery to service and employ more than 50 exceptionally talented and hard-working individuals. Quality Propane is a family-owned and -operated business that will continue to set the standard for years to come.

What is your service area?

We service all of Connecticut and Rhode Island for residential and commercial customers.

How would you describe your company's values?

We strive to treat every customer with respect and to listen to their needs, concerns and opinions. We answer every call with a live person, and every customer gets the personal treatment they would expect to get from their propane provider. Our customers are not just account numbers — they are the reason we exist.

What about your business helps you stand out as a marketer in your region?

We have a bobtail truck that we have lettered for the Connecticut Humane Society, and we donate 1 cent of every





gallon delivered with this truck to the Connecticut Humane Society. Additionally, we are extremely involved in our community, donating time, money and resources to many incredible organizations, including: New London Rotary Foundation, Hope Partnership, Rotary Club of Old Saybrook, Lyme Public Library Foundation, Bill's Seafood Annual Athletic Scholarship Golf Tournament, Florence Griswold Museum Foundation, The Independent Day School Fearless 5K Road Race, and Shoreline Soup Kitchen.

Can you tell us a story of how an employee embodied your company values?

One of our employees offered to shovel the snow off an elderly customer's driveway so that she could get to her doctor's appointment. She was extremely appreciative and grateful.

What value do you believe propane businesses provide to the public?

We provide a dependable energy solution at a competitive cost.

Can you also tell us a story about a specific customer need and how your team worked to meet that need?

One of our customers, who was a military veteran, was in need of a new heating system. Quality Propane installed the heating system free of charge. We wanted to give back to a veteran in recognition of his service and sacrifice.



What industry trends have impacted Quality Propane the most in recent years?

The introduction and implementation of tablets in the trucks, and the ability to email delivery tickets and invoices.

Is there anything your team is concerned about/keeping an eye on in the industry?

Yes: The push for electrification and the reduction of fossil fuels as a reliable, cost-effective energy source.

Where do you hope to see the propane industry in the next five to 10 years?

We look forward to the continued growth of the propane industry and its recognition as a reliable energy source.





Smooth inspections happen when safety, compliance and strong inspector partnerships are baked into a propane company's culture.

INSPECTORS ARE THE FRIENDS YOU MADE ALONG THE WAY

Why building trust & strengthening partnerships with safety investigators is the path to a smooth inspection process

BY KIRSTEN MCALPIN

IMAGES COURTESY OF CONGER LP GAS

The most successful propane companies don't just pass inspections — they build lasting partnerships with regulators and inspectors. In a highly regulated industry like energy, where safety and compliance are paramount, a strong rapport can make a meaningful difference. When those connections are established well before a site visit or time of need, they create a foundation of trust and understanding.

For some marketers, inspections and compliance issues can feel like headaches and mountains of stress. But when those interactions are built on mutual respect and open communication, the process often becomes a much smoother experience for everyone involved. In many ways, strong partnerships are the fuel that keeps a propane company running at its best.

INSPECTORS AREN'T ADVERSARIES

When the inevitable time comes for an inspection or investigation, it is important for marketers not to assume the interaction will be negative. Clay Greene, a retired division administrator for the Florida Division of the Federal Motor Carrier Safety Administration, as well as founder and president of ACME HAZMAT Transportation Solutions LLC, said he tries to ease the tension from the start.

"My tagline was always 'I'm from the government, and I'm here to help!' President Reagan said those were the nine most terrifying words in the English language. I used it as an icebreaker — but I truly meant it."

Greene said that companies with the strongest safety cultures never treated safety investigators as adversaries, but as partners. "They saw inspections and compliance reviews as part of a system designed to prevent accidents and incidents," he said.

When hosting an event at your business or a meeting with your association, it is always a great idea to extend an invitation to officials and regulators. They may not be able to attend, but doing so puts your name and your business name in front of them and shows that you regarded them and would have appreciated their attendance.

Any time we have a grand opening for a new location or any other kind of special event, we always invite local and state government officials. The Southeast Propane Alliance also regularly invites state officials to attend meetings and holiday events, thereby familiarizing both members and officials with one another in an informal environment.

MAKE SAFETY A PRIORITY

Safety should always be at the very top of your company's priorities. Greene said that in his interactions during

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Conger LP Gas President Dan Richardson (far right) meets with Georgia inspection officials at a Southeast Propane Alliance meeting.



Dedicated safety training for your employees equips them with confidence during roadside inspections.

investigations or inspections, the companies that struggled the most tended to treat safety as something they were required to do, while those that performed well viewed safety as integral to their business. He said he could tell a lot about the company within minutes.

"That difference showed up quickly in how drivers talk about their equipment, how records were organized and how management responds to questions from employees and company safety performance," he said.

At Conger LP Gas, our director of operations, safety and compliance, Steve Hooks, regularly holds company-wide and on-site training sessions at our nine locations, covering topics ranging from fire extinguisher safety to the dangers of distracted driving. When an employee is undergoing onboarding, Hooks and the other service technicians also train new technicians and drivers extensively on proper procedures for our trucks and equipment, as well as on the roadways and in the field. The training must go a step further and must become part of the company culture and expectations.

INVEST IN YOUR PEOPLE

Your people are your brand ambassadors, and they are the ones who are one-on-one with anyone they come into contact with, from the public on their routes and service calls to the official who pulls them over for an inspection. While you certainly need to equip your team with all the tools they need, from the right verbiage to use to the proper paperwork, go beyond that and teach them why their work is important and what it means.

Greene said, "When employees understand the 'why' behind the hazardous materials and motor carrier safety regulations, that understanding builds confidence. Confident, well-trained employees perform better, especially during roadside inspections or investigations, which translates to fewer violations being cited against a company."

COMPLIANCE IS THE FLOOR, NOT THE CEILING

Having a proactive mindset when it comes to potential safety concerns can head off many issues before they even come to fruition. Greene was always impressed when companies did not wait for an investigator to find a problem. They conducted internal reviews and consistently analyzed their safety performance data. He said, "These companies looked for trends in violations being cited during roadside inspections and analyzed any incidents to focus on finding best practices to move forward, fixing small problems before they become bigger issues."

COMMUNICATION IS KEY

Inspectors and regulators cannot help you navigate an issue if they do not know about it in advance. Greene stressed the importance of communication by saying, "If you are expanding operations, implementing new technologies or introducing new equipment, reaching out to regulators ahead of time can prevent misunderstandings."

Early communication (depending on the project) allows time to research proper procedures, and your team can ensure the evolving rules are being followed. With the growth Conger LP Gas has been experiencing lately, it sometimes seems like the state fire marshal or the agriculture commissioner is on our speed dial and always more than gracious in answering questions or offering guidance.

WE'RE ALL ON THE SAME TEAM

While interacting with regulators and inspectors may seem daunting at first, fostering a relationship with those who oversee your operations is one of the most important things a company can do.

Greene summed it up well when he said, "When companies embrace that shared purpose, investigations and inspections can become conversations. And conversations are much more productive than confrontations."

After all, everyone is working toward the same goal: safe operations and the prevention of accidents and incidents.

Kirsten McAlpin is the director of marketing and public relations for Conger LP Gas Inc. She is a Ph.D. student at Liberty University, studying communications, and holds a Master of Science in integrated marketing communications from West Virginia University, where she is also an adjunct professor. McAlpin is the past chair of Women in Propane's communications and marketing committee. Email kirstenmcalpin@congerlpgas.com. Visit congerlpgas.com.



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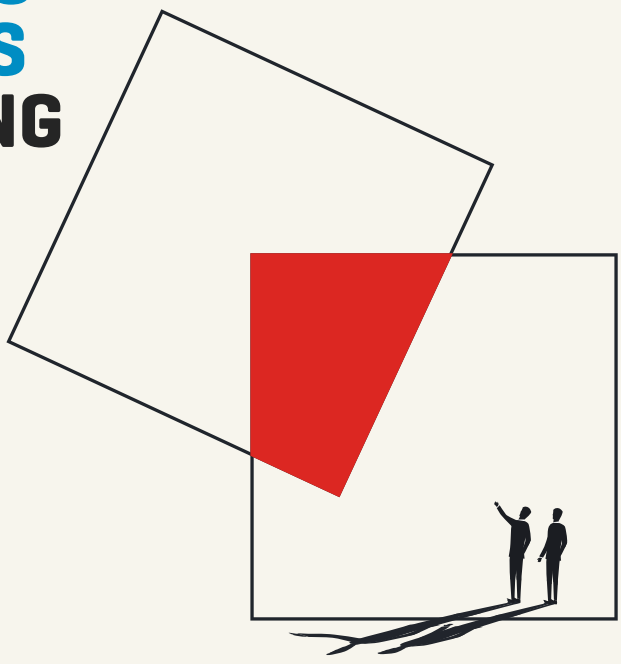
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COMMON PITFALLS & BEST PRACTICES WHEN INTEGRATING CULTURE & LEADERSHIP IN A MERGER

Successful propane & fuel oil mergers depend on carefully integrating culture, operations & leadership after closing

BY MIKE GIOFFRE



JOZEFMICIC - STOCK.ADOBE.COM

In the propane and fuel oil industry, most mergers appear sound on paper. Financials align, volumes are logical and valuations are fair. At closing, both parties are confident in the transaction.

However, months later, companies face issues — not because of EBITDA (a widely used measure of a company's financial health) or pricing assumptions, but because the buyer underestimates the integration process.

Integration in this industry extends beyond administrative tasks. It presents a human, operational and leadership challenge that directly impacts customer retention, employee morale and long-term value. Owners who overlook this often find that post-closing issues undermine their deals.

Recognizing common pitfalls and applying best practices can determine whether a transition is smooth or costly.

COMMON PITFALL NO. 1: ASSUMING CULTURE WILL WORK ITSELF OUT

Families often own propane and fuel oil businesses, building them through relationships and informal norms they've developed over decades. Acquirers often assume employees will easily adapt after a change in ownership.

In practice, drivers are loyal to people, not logos. Office staff often define how things work more than systems do, and long-tenured employees may feel threatened, even if their jobs are safe.

Neglecting cultural integration triggers subtle resistance, such as slower adoption of new processes, declining morale and increased turnover among key employees.

These issues may not appear immediately, but over time, they erode value.

BEST PRACTICE: ACKNOWLEDGE CULTURE EARLY & EXPLICITLY

Successful acquirers begin by acknowledging the importance of culture. Best-in-class acquirers:

- Take time to understand how decisions were historically made
- Identify informal leaders within the organization
- Communicate clearly about what will change — and what won't

Simple actions — such as explaining the reasons behind certain practices — reduce uncertainty and build trust. While acquirers don't need to preserve culture in its entirety, they must respect it to integrate successfully.

COMMON PITFALL NO. 2: FORCING STANDARDIZATION TOO QUICKLY

After a merger, leadership often feels pressure to consolidate systems quickly. While standardization matters, moving too fast disrupts effective operations within the company.

In propane and fuel oil businesses, this often shows up as:

- Route optimization changes that frustrate drivers and customers
- New dispatch or billing systems implemented without adequate employee training

- Policy changes that don't reflect local market realities

Operational disruptions directly cause customer dissatisfaction and churn, particularly in rural or relationship-driven markets.

BEST PRACTICE: STABILIZE FIRST, OPTIMIZE SECOND

Strong integrations typically follow a clear sequence:

1. **Stabilize operations** to ensure continuity of service
2. **Observe performance** under the new ownership structure
3. **Optimize gradually,** informed by real-world results

This approach protects customer relationships and enables teams to implement operational improvements with context and support rather than resistance.

COMMON PITFALL NO. 3: UNCLEAR LEADERSHIP ROLES POST-CLOSING

Failing to clearly define company leadership roles poses a significant risk in post-merger integration. This is especially common when:

- A former owner stays on in an operating role
- Family members remain involved in company operations
- Regional managers are layered over existing leadership

When companies don't clarify authority, employees lack direction, decision-making slows and responsibility becomes blurred.

Over time, this ambiguity creates widespread frustration.

BEST PRACTICE: DEFINE AUTHORITY, RESPONSIBILITY & DURATION

Effective leadership integration requires clarity. Best practices include:

- Clearly defining who makes which decisions
- Establishing reporting structures
- Setting expectations around how long legacy leadership will remain involved

If a former owner is staying on, it's key to define whether they are acting as:

- An operator
- An advisor
- A transitional leader with a defined exit timeline

COMMON PITFALL NO. 4: COMMUNICATING ONLY WHEN REQUIRED

Inadequate communication — not poor intentions — causes many integration challenges. Employees often learn about changes:

- After decisions have already been made internally
- Through rumors rather than from leadership



- Without understanding the reasoning behind them

This uncertainty triggers employee disengagement.

BEST PRACTICE: COMMUNICATE EARLY, OFTEN & HONESTLY

Successful acquirers treat communication as a core strategy rather than an afterthought. This means:

- Explaining the "why" behind changes
- Acknowledging existing uncertainty
- Providing consistent updates,

COMMON PITFALL NO. 5: ASSUMING CUSTOMERS WON'T NOTICE

Customers notice more than acquirers anticipate. They notice:

- New voices answering the phone
- Changes in delivery schedules
- Different billing formats
- Subtle shifts in service responsiveness

When integration impacts customers, companies face consequences: churn, complaints and diminished goodwill.

BEST PRACTICE: PROTECT THE CUSTOMER EXPERIENCE AT ALL COSTS

The most effective acquirers regard customer continuity as essential. This includes:

- Maintaining familiar points of contact whenever possible
- Communicating proactively about any visible changes
- Empowering frontline employees to address concerns

Once companies lose customer trust, rebuilding it is costly.

THE BOTTOM LINE: INTEGRATION IS WHERE VALUE IS EARNED OR LOST

In propane and fuel oil mergers, the transaction is only the starting point. True success depends on:

- Whether employees stay engaged
- Whether customers remain loyal
- Whether operations continue smoothly
- Whether leadership transitions with clarity

Neglecting cultural, operational and leadership integration not only creates friction but also jeopardizes the transaction's long-term value. Owners and acquirers who invest as much care in integration as in negotiations are more likely to achieve their intended outcomes.

In this industry, the approach to integration is as important as the reasons for merging.

Mike Gioffre is a partner at Blue Peak Resources. You can reach him at mg@bpeakr.com or visit bluepeakresources.com.





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TEMPERATURE COMPENSATION UPDATE: WHAT THE 2034 EXTENSION MEANS FOR MARKETERS

New key updates on Handbook 130 regulations to keep top of mind

BY GARY BOZIGAR

In my previous article titled "How New Handbook 130 Regulations Will Transform the Propane Industry" (see BPN's July 2024 issue), I outlined the significant changes coming from the 2024 edition of the National Institute of Standards and Technology (NIST) Handbook 130, regarding automatic temperature compensation (ATC) for liquid propane meters.

At that time, the industry was facing two key compliance dates: Jan. 1, 2026, and Jan. 1, 2030.

WHERE WE STAND IN 2026

As we move through 2026, there is important news: The retrofit deadline for existing in-service meters has been extended to Jan. 1, 2034, in states adopting the revised language. This extension was secured through advocacy efforts led by the National Propane Gas Association in cooperation with the National Conference on Weights and Measures, as well as NIST. The requirement has not gone away — but the runway is longer.

WHAT THE 2034 EXTENSION MEANS

The first compliance milestone has already arrived. As of Jan. 1 of this year, any liquid propane meter with a flow rate of 20 gallons per minute or less that is placed into service must be equipped with automatic temperature compensation. This applies to:

- New installations
- Meters replaced due to failure
- Meters that are removed and later reinstalled

The long-standing exemption for low-flow meters — which had existed since 1986 — is now officially over. However, the original mandate requiring all in-service meters to comply by Jan. 1, 2030, has been extended to Jan. 1, 2034, in adopting states.

This is a meaningful change for the propane industry.

First, this is not permanent grandfathering. Non-ATC meters currently in service will still need to be upgraded or replaced to meet requirements. The extension simply provides additional time for compliance.

Second, Handbook 130 is a model code. States adopt and enforce it individually. Marketers should verify their own state's adoption timeline and enforcement guidance.

Third, while 2034 may feel distant, the scope of impact remains significant. Thousands of small, low-flow propane meters across the country will ultimately require modification. The extension gives marketers flexibility — but it should not encourage delay.

WHY THIS CODE CHANGE MATTERS

Unlike past industry upgrades, such as the overfill protection device mandate or



bulk plant upgrades under NFPA 58 (from the National Fire Protection Association), this requirement directly affects retail transactions. ATC adjusts the metered volume of propane to 60 F, the national reference temperature for petroleum products.

Without ATC:

- In colder weather, customers receive slightly more propane than indicated.
- In warmer weather, they receive slightly less.

ATC ensures that a gallon is a true gallon regardless of ambient temperature. It standardizes transactions, improves measurement equity and aligns propane with other motor fuel industries.

UPGRADE OR REPLACE? A PRACTICAL EQUIPMENT DISCUSSION

With the extended timeline, marketers now have the opportunity to make measured equipment decisions rather than reacting under pressure.

RETROFITTING EXISTING METERS

Many meters can be upgraded with an ATC retrofit kit. Typical costs range between $1,700 and $3,000 per meter, depending on compatibility.

Keep in mind:

- Not all meter models are upgradeable.
- Installation requires downtime.
- Meters must be properly recalibrated after installation.
- Some states may require recertification or mobile prover verification.

For relatively new meters in good mechanical condition, retrofitting may be the most economical option.

FULL REPLACEMENT

For older meters, replacement may be the better long-term investment.

A new meter with factory-installed ATC may offer:

- Better long-term durability
- Electronic register options
- Compatibility with digital systems
- Extended service life beyond 2034

Investing $2,000 in a 15-year-old meter may not always be the best capital decision.

AVOIDING A 2033 BOTTLENECK

The propane industry has been through large-scale compliance transitions before. One consistent lesson: Waiting until the final compliance window increases cost and operational strain.

Consider what could happen if a large portion of the industry waits until 2032 or 2033:

- Limited availability of ATC kits
- Longer equipment lead times
- Technician shortages
- Delays in scheduling required prover certification

The extension to 2034 allows marketers to spread capital expenditures across multiple budget cycles. That flexibility should be used strategically.

A PROACTIVE APPROACH FOR 2026 & BEYOND

In 2026, a smart approach includes:

- Inventorying all low-flow meters in service
- Identifying which models are eligible for upgrade
- Evaluating overall age and mechanical condition
- Prioritizing high-volume locations
- Building a multiyear upgrade plan through 2032

Many marketers are choosing to coordinate ATC compliance with broader modernization efforts: dispenser upgrades, cardlock integration or fleet fueling expansions. Combining projects can reduce downtime and improve overall return on investment.

The 2034 retrofit extension is a positive development for the industry. It reflects productive engagement between regulators and propane advocates. It gives marketers time to plan thoughtfully rather than react urgently.

But the direction of the code is clear.

Automatic temperature compensation will become the universal standard for liquid propane measurement. The question is not whether upgrades will be required — it is how and when you will implement them.

The marketers who treat 2026 as the starting point — not the midpoint — will control costs, minimize disruption and maintain full compliance well before the deadline arrives.

PLAN NOW TO STAY AHEAD

As you prepare for 2034, it may seem far away. But in capital planning terms, it is right around the corner.

Gary Bozigar is director of propane technologies with Bergquist Inc. in Toledo, Ohio. He has more than 20 years of experience in propane retail, equipment distribution, sales and leadership. He can be reached at gary.bozigar@bergquistinc.com. Visit bergquistinc.com.



THE COMMON EMPLOYEE CONFLICT THAT'S HURTING YOUR PROPANE BUSINESS

4 steps leadership can take to resolve workplace issues & strengthen teams

BY KENDALL RAWLS



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Dae Park had been running his family's propane business for over 20 years, and he prided himself on having a loyal team. But recently, things had changed.

Tensions were high between his two top delivery drivers, Matteo and Tonya. Matteo, an industry veteran, felt Tonya didn't respect his years of experience. Tonya, on the other hand, was frustrated that Matteo resisted using the new routing and tank monitoring software, which she believed would reduce unnecessary deliveries and improve efficiency.

Their constant bickering led to missed scheduled fills, frustrated customers running low on propane and tension in the office.

Dae knew if he didn't step in soon, he could lose one — or both — of his best employees. But how could he resolve the conflict without taking sides?

UNDERSTANDING THE REAL COST OF WORKPLACE CONFLICT IN THE PROPANE INDUSTRY

Dae's situation wasn't unique. Many propane dealers experience similar workplace conflicts, and when left unresolved, they can lead to:

- *Decreased efficiency:* Matteo and Tonya's inability to work together resulted in dispatch confusion, inefficient routes and missed stops.
- *Higher turnover:* If one of them quit, Dae would have to recruit and train a new CDL-certified propane driver — a process that could take months given the nationwide driver shortage.
- *Customer impact:* Several long-time customers, including local farms and commercial accounts, had already complained about late deliveries, which put essential heating and business operations at risk.

The longer conflicts linger, the more damage they do. But by addressing them early, business owners can turn friction into an opportunity for improvement.

COMMON SOURCES OF CONFLICT IN PROPANE DEALERSHIPS

Conflicts in a propane business often stem from:

- *Miscommunication in scheduling:* Changes in daily delivery schedules due to weather, road closures or tank levels can lead to confusion.
- *Technology vs. tradition:* Experienced drivers may resist digital dispatching and tank monitoring systems, preferring manual route planning and customer calls.
- *High-pressure work environment:* Winter demand spikes can cause stress and burnout, leading to short tempers across operations.



- *Customer service vs. efficiency:* Some employees prioritize long-time customers with personal relationships, while others focus on reducing costs and increasing delivery efficiency.

In Dae's case, the root issue was a mix of resistance to new technology and personality clashes; Matteo felt devalued, and Tonya felt unheard.

PROACTIVE STRATEGIES TO REDUCE CONFLICT BEFORE IT STARTS

To prevent these situations, propane business owners should:

- *Set clear expectations:* Every driver should understand how schedules are built, why tank monitoring technology is being implemented and how customer needs are prioritized.
- *Improve communication channels:* Use daily huddles with dispatch, text alerts for schedule updates and a clear chain of command to reduce confusion.
- *Balance technology with experience:* Encourage seasoned drivers to share customer insights, while newer employees highlight efficiency improvements.
- *Provide training on new systems:* Offer hands-on training for tools like real-time delivery tracking, digital dispatching and automated refill alerts to ease the transition.

Had Dae involved Matteo in early discussions about the new routing software, he might have built buy-in rather than resistance.

HOW TO RESOLVE CONFLICTS WHEN THEY ARISE

Step 1: Identify the Root Cause

Dae pulled Matteo and Tonya into his office separately to hear both sides. Matteo felt his knowledge of long-time customers was being ignored. Tonya felt Matteo's reluctance to adopt smart routing and tank monitors was causing inefficiencies.

Step 2: Encourage Open & Respectful Dialogue Between Employees

Instead of letting frustration fester, Dae facilitated a structured conversation between the two team members. He made it clear that both experience and technology matter in propane delivery; the goal wasn't choosing one over the other but combining them for the best service.

Step 3: Find a Win-Win Solution

Dae suggested a compromise:

- Matteo would commit to learning the new software and try it on a trial basis.
- Tonya would work with Matteo to ensure customer-specific needs (like special delivery requests) were incorporated into the digital system.

Step 4: Follow Up

Dae checked in weekly to track improvements and acknowledged Matteo and Tonya's teamwork when they successfully adjusted routes for an unexpected cold snap, ensuring no customers ran out of propane.

WHEN TOUGH DECISIONS ARE NECESSARY

If an employee refuses to adapt or creates ongoing disruptions, leadership must decide whether they are holding the company back. For Dae, addressing the issue head-on saved two valuable employees instead of losing them to frustration and resentment.

THE ROLE OF LEADERSHIP IN CONFLICT RESOLUTION

- Employees take their cues from leadership. If owners and managers embrace both experience and innovation, employees will follow suit.
- Encourage open communication so employees feel safe voicing concerns before they escalate into full-blown disputes.

By addressing Matteo and Tonya's issue fairly, Dae reinforced a team-first culture that demonstrates how both industry knowledge and efficiency improvements are valued.

TURNING CONFLICT INTO AN OPPORTUNITY FOR GROWTH

By resolving the conflict between Matteo and Tonya, Dae not only prevented further disruptions, but he also strengthened his team.

The two drivers eventually became a more efficient duo, combining Matteo's industry wisdom with Tonya's tech-savvy approach to ensure faster, smarter deliveries.

Instead of seeing conflict as a disruption, propane dealers should view it as a chance to strengthen teamwork, improve communication and enhance service reliability — all of which contribute to a more profitable and customer-focused propane business.

TAKEAWAYS FOR DEALERS

- *Technology vs. tradition:* Instead of forcing change, involve veteran employees in discussions about new dispatch and tank monitoring systems to build buy-in.

- *Customer service vs. efficiency:* Long-time customers expect personal service, but smart routing ensures on-time deliveries for all. Finding a balance keeps everyone satisfied.
- *Driver retention matters:* CDL-certified propane drivers are hard to replace. Addressing conflicts early prevents unnecessary turnover.
- *Winter delivery pressures:* Stress levels rise during peak season; proactive conflict resolution keeps operations running smoothly when demand surges.

By implementing these propane-specific strategies, business owners can turn internal conflicts into stepping stones for stronger operations and better customer service.

TRANSFORMING CONFLICT INTO STRATEGIC OPPORTUNITY

In cases like Dae's, addressing employee conflict is essential not just for maintaining daily operations but also for aligning with the company's short- to mid-term strategic goals. Effective conflict resolution supports a business's ability to scale and build a sustainable, resilient operation.

It's about laying a solid foundation today that prepares the business for future challenges and opportunities, ensuring it can adapt and thrive no matter the circumstances.

Leadership's role in fostering an environment of trust, respect and collaboration becomes a core component of building a culture that attracts top talent and encourages a commitment to collective goals.

When employees are aligned and motivated, the entire organization is poised for success, which directly influences its capacity for both growth and resilience.

Interested in applying these principles in your business?

Download a free Management Synergy and Teamwork Guide. This guide is filled with practical tips and strategies to improve team dynamics and operational efficiency. Secure your copy today at tinyurl.com/managementsynergyteamwork. Equip yourself with the necessary tools to ensure your business is robust, adaptable and ready for whatever the future holds.

Kendall Rawls is the director of development with The Rawls Group — Business Succession Planners. She understands the challenges that impact the success of a family-owned business as a second-generation family member employee of The Rawls Group. For more information, visit rawlsgroup.com, call 407-578-4455 or email info@rawlsgroup.com.



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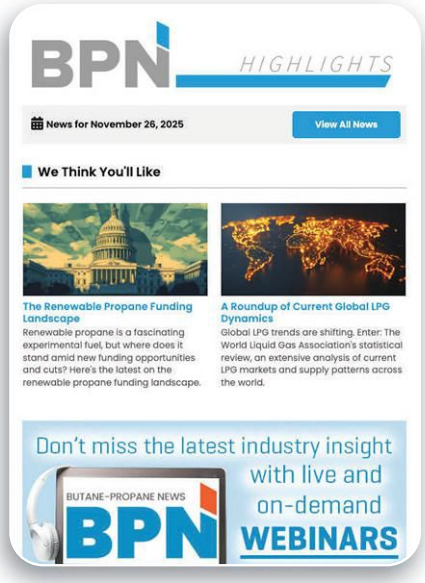
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A TALE OF 2 WINTERS

A stark contrast between cold northern markets & warm western regions could shape the tone of the 2026 M&A market

BY BARRETT CONWAY

"Brr! It's cold in here."

That could easily have been the tagline for much of this winter across the northern United States. Propane marketers in the upper Midwest and Northeast felt it firsthand, as temperatures routinely fell below seasonal norms and multiple intense cold waves tightened supply logistics and drove sustained demand.

January and February delivered scenes not witnessed in years, like the Hudson River icing over near Manhattan, New York, and measurable snowfall in Orlando, Florida. Record-breaking lows made national headlines: Watertown, New York, plunged to -34 F on Jan. 24, setting a daily record, while Cleveland, Ohio, endured its coldest sustained stretch of daytime highs (17 F or lower) in decades, tying records dating back to the late 1800s. Even parts of the Southeast joined the deep freeze, with cities such as Jacksonville, Florida, and Savannah, Georgia, recording their coldest November mornings since 1976.

Meanwhile, on the literal opposite side of the country, the story could not have been more different.

Much of the West region experienced unseasonal warmth. California, Oregon, Washington and portions of the Southwest logged one of their warmest Decembers on record, with temperatures running well above long-term averages. A weakening La Niña pattern, shifting polar vortex dynamics and other atmospheric forces combined to create sharp regional contrasts and inconsistent storm activity across the West.

I saw it firsthand while skiing in Utah in mid-February. As the chairlift climbed higher, we passed stretches of bare, brown mountainside that looked more like late summer than peak ski season — something I hadn't witnessed in more than 30 years on the slopes.

These stark regional differences may shape how we exit the busy season and could influence the dynamics of the 2026 mergers and acquisitions (M&A) market — and much more — in the months ahead. This "tale of two winters" is more than a weather story. It may shape the tone and trajectory of the 2026 propane M&A market.

EBITDA DISPERSION: CREATING OPPORTUNITY & MOTIVATION

Colder-than-normal conditions in northern markets likely supported stronger winter volumes and improved near-term EBITDA (a common measure of a company's financial health) for many retailers. For owners who have now experienced back-to-back solid

seasons, this may reinforce confidence in pursuing a sale while earnings are strong, visible and defensible.

Conversely, operators in warmer regions may have faced softer volumes, margin compression or customer attrition. For some, this could accelerate succession-driven exit decisions, particularly among owners already contemplating transition.

For buyers, these situations often present opportunity. Underperforming assets in otherwise attractive geographies can frequently be repositioned through operational integration, route optimization, enhanced pricing discipline and improved back-office efficiency.

What is the result? Wider regional performance dispersion. Historically, dispersion tends to increase transaction conversations, but it also intensifies scrutiny during due diligence.

A GREATER FOCUS ON 'NORMALIZED' EARNINGS

When weather materially impacts performance, buyers inevitably lean into normalization analysis. Degree days, multiyear gallon averages, customer retention metrics, margin consistency and working capital trends will be central to valuation discussions in 2026.

We expect transaction structures to reflect this dynamic. Earn-outs tied to customer retention, gallon thresholds or EBITDA targets may become more common. Seller notes and disciplined working capital adjustments will likely remain prevalent. Buyers will seek durability, not just peak performance.

INTEREST RATES: INCREMENTAL RELIEF, NOT A WINDFALL

Macroeconomic conditions remain central to the M&A equation. While expectations suggest modest interest rate relief relative to peak levels, uncertainty persists around both timing and magnitude.

For propane acquirers, this likely translates into continued lender discipline. Leverage will remain available for strong credits and well-performing assets, but underwriting standards should stay measured. With bonus depreciation back in place, strategic buyers may continue utilizing leverage efficiently to enhance after-tax returns, but we are unlikely to see a return to the aggressive capital environments of prior cycles.

SUPPLY STABILITY & MARGIN VISIBILITY

From a commodity standpoint, expectations for steady propane production and adequate inventory levels reduce the likelihood of extreme price volatility. That stability matters.

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When marketers can forecast cost of goods and margin behavior with greater confidence, buyers can more reliably underwrite cash flow durability, one of the primary drivers of valuation multiples. Predictability supports confidence, and confidence supports transactions.

CONTINUED CONSOLIDATION IN A FRAGMENTED INDUSTRY

The propane distribution landscape remains highly fragmented. Private capital and strategic buyers alike continue to view the sector as attractive due to its recurring revenue characteristics, essential-service nature and opportunities for operational consolidation.

Those structural fundamentals have not changed. If anything, regional divergence may reinforce consolidation logic. Buyers can diversify geographic exposure, smooth weather variability, enhance route density and strengthen supply positioning through targeted acquisitions. Scale continues to provide both offensive and defensive advantages.

EXPERT VIEWPOINTS FROM INDUSTRY LEADERS

Trent Hampton — Lakes Gas:
"My view on M&A is that there will be a vigorous M&A market with midsize and large retailers, and some [private equity], looking for deals. Some of the supply and labor challenges may encourage more small marketers to think about selling, and if the cost of capital (interest) comes down, that might spur even more activity. I'm also optimistic for the industry in general heading into the 2026-27 season."

Steve Wambold — Lettermen's Energy:
"As we look toward 2026, it feels like the propane M&A landscape could be a bit of a mixed bag. In some parts of the country, political pressures and another stretch of warm winters are making things tougher for local operators. That's real, and we're hearing it directly from owners.

"At the same time, this industry has always proven its resilience. The fundamentals remain strong, and there continues to be real demand for reliable providers. We're also seeing continued interest from well-capitalized operators — Lettermen's included — who can offer owners a strong path forward while preserving what they've built.

"From where we sit as both an operator and an acquirer, we're optimistic about the year ahead and confident in the long-term strength of this industry."

Sean Daugherty — Reliable Energy Partners:
"As we exit the winter months, Reliable Energy Partners remains optimistic about our M&A position. 2025 marked a banner year for us, with the acquisition of five businesses and several remarkable



milestones achieved. While we celebrate these early successes, our ambition continues to grow for 2026 and beyond. Many marketers enjoyed a strong and profitable winter, and with favorable economic conditions on the horizon, we believe the acquisition market will be robust and advantageous for both sellers and buyers this year. We intend to be strategically active, eagerly reviewing new deal opportunities and further strengthening our reputation as the acquirer of choice."

Anthony Silecchia — Star Group:
"We expect M&A activity to remain strong throughout 2026 with established, premier businesses leading the way on valuations. Their ability to maintain pace with the colder weather and storm challenges of this winter should be evident in volumes, margins, account growth and on bottom lines, underscoring the stability of the platforms they have worked so hard to build."

Jordan Landrum — Guardian Propane Partners:
"I see this upcoming season as the year we move beyond just tech adoption and really commit to integration. Organizations interested in holding expenses flat while expanding into new markets need the tools to do more than maintain — they need to intelligently point to tangible action items. If our technology works for us, our talented team members can focus on what's truly important to the customer."

THE BOTTOM LINE FOR 2026

The most probable scenario for 2026 is not a dramatic spike in transactions, but rather steady, strategic deal flow. Premium assets in strong markets should command healthy valuations. Average or weather-impacted businesses will still transact, but with more conservative structures and sharper buyer discipline.

In short, the propane M&A market appears poised for continued activity, shaped not only by interest rates and commodity dynamics but also the lasting effects of a winter that reminded us just how regional this business can be.

After a winter that highlighted the industry's regional dynamics, geography may prove to be one of the defining drivers of dealmaking in the year ahead.

Barrett Conway is managing director and principal at Cetane Associates, where he has led the execution of over 85 successful M&A deals. His in-depth experience encompasses financial, business and transaction analysis. Conway is a frequent industry speaker and sits on the National Propane Gas Association audit committee. Contact him at bconway@cetane.com. Visit cetane.com.







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IF PHMSA INSPECTED YOUR COMPANY TODAY, WOULD YOU PASS?

2025 changes in the regulatory agency's focus will impact how propane distributors need to strategize compliance efforts

BY ISAAC LOVATO

On Nov. 20, 2025, the Pipeline and Hazardous Materials Safety Administration (PHMSA) released a memo that shifts how it prioritizes inspections and enforcement actions. For companies that manufacture, ship, package or transport hazardous materials, this signals a change that requires immediate attention and prep.

For propane shippers, this means increased scrutiny across compliance areas like employee training, shipping documentation, packaging selection, emergency response info, and condition and regulatory status of cylinders and cargo tanks used for transport.

Because propane distribution relies heavily on reusable cylinders that remain in circulation for many years, PHMSA's risk-based inspection approach places particular importance on whether companies maintain proper oversight of these assets and the records that support their continued safe use. Understanding how cylinder compliance fits into PHMSA's broader inspection priorities helps ensure operational readiness.

WHAT CHANGED IN PHMSA'S ENFORCEMENT APPROACH?

The memo from PHMSA's Office of Hazardous Materials Safety emphasizes targeting inspections and enforcement where they provide the greatest positive impact on hazardous materials safety while avoiding overly broad or novel interpretations of regulations. In practice, this means PHMSA inspections will be increasingly risk-based rather than purely random. The memo identifies specific outreach initiatives inspection priorities and enforcement standards that regulated entities should understand and prepare for immediately.

PHMSA'S STRATEGIC PRIORITIES: WHAT COMPANIES SHOULD KNOW

1. Outreach Priorities

PHMSA emphasizes proactive engagement to improve compliance before enforcement becomes necessary. This includes strengthening communication with hazmat shippers, clarifying packaging selection requirements and promoting accurate classification of materials prior to shipment. Because packaging and classification remain among the most common sources of violations, staying informed is critical.

Companies that actively participate in PHMSA webinars, seek regulatory guidance and implement good-faith compliance practices are generally less likely to have errors or noncompliance issues. By staying informed and applying best practices, companies reduce risk of violations before inspections ever occur.

2. Inspection Priorities

PHMSA's inspections now focus on operations that present the highest safety risk or recurring compliance concerns. Priority targets include:

- General hazardous materials shippers and offerers
- Cylinder requalification and manufacturing facilities
- Drum manufacturing and recertification operations
- Lithium battery shippers
- E-commerce platform shippers with potential undeclared hazardous materials

Among these priorities, cylinder requalification and life-cycle management represent a particularly important focus area for propane distributors. Unlike single-use packaging, Department of Transportation (DOT) cylinders are repeatedly refilled and transported over long service lives, making periodic inspection and requalification essential to ensuring their structural integrity and safe

transport. PHMSA inspectors routinely verify that cylinders are within their authorized requalification period, properly marked in accordance with regulatory requirements and supported by complete and traceable test records. Expired requalification markings, missing documentation or inadequate tracking systems may indicate broader compliance weaknesses and can result in enforcement action.

Under PHMSA's risk-based inspection model, companies must be able to demonstrate immediately that cylinders in service have been properly inspected, tested and approved for continued transportation, making cylinder requalification tracking a critical component of hazardous materials compliance for your operations.

PHMSA also emphasizes follow-up inspections for companies with prior violations to verify that corrective actions were implemented. Inspections are increasingly data-driven and risk-based, rather than routine or evenly distributed.

3. Enforcement Standards

PHMSA's enforcement approach is now timely, consistent and risk focused. Violations posing the greatest risk to public safety, the environment or transportation security receive enforcement priority. By leveraging trend analysis and case management data, PHMSA identifies recurring violations and emerging risks, meaning companies with compliance gaps or a history of violations can expect increased scrutiny.

WHAT PHMSA WILL LIKELY REQUEST DURING AN INSPECTION

PHMSA inspections routinely review documentation that demonstrates compliance. Based on standard practices, inspectors may request:

Hazmat Employee Training (49 CFR 172.704)

- Initial and recurrent training (every three years), covering general awareness, function-specific tasks, safety and security awareness
- Training records must be maintained while employees perform hazmat functions and for 90 days afterward
- Documentation of training completion and testing/certification

Shipping Papers & Documentation (49 CFR 172.200–205)

- Proper shipping name, hazard class, identification number (UN/NA)
- Packing group and total quantity
- Emergency response information (49 CFR 172.602), including a 24-hour emergency contact number
- Retention — one-year minimum (three years for hazardous waste shipments)

Packaging Selection & Certification (49 CFR 173)

- Evidence that packaging was selected according to the Hazardous Materials Table (49 CFR 172.101)
- Packaging specifications and certification documents
- Requalification records for reusable containers (cylinders, IBCs, etc.)
- Proof that packaging meets performance standards for materials shipped

Security Plans (49 CFR 172.800–804, if required)

- Written security plan for companies shipping high-consequence materials
- Security awareness training documentation and records
- Personnel security background checks (if applicable)

Incident Reports (49 CFR 171.15–16)

- Immediate notice of certain hazmat incidents
- Written incident reports filed with PHMSA (Form F 5800.1)
- Internal incident investigations and corrective actions

Attention: Failure to provide requested documentation promptly — typically in minutes — can itself indicate inadequate

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Cylinder Inspection & Requalification Records (49 CFR 180.205, 180.209, 180.213)

- Requalification records, including hydrostatic testing or visual inspection results, as applicable
- Confirmation that cylinders are within their authorized requalification interval (typically five, seven or 12 years depending on method used)
- Proper requalification markings stamped on the cylinder, including:
  - Requalifier identification number (RIN)
  - Month and year of requalification
  - Test method marking (hydrostatic test, external visual inspection, etc.)
- Evidence that requalification was performed by an authorized facility holding a valid RIN
- Procedures for removing expired or noncompliant cylinders from service
- Internal tracking systems used to monitor cylinder requalification status
- Records demonstrating that cylinders with expired or invalid requalification markings are not offered for transportation

During facility inspections, PHMSA personnel may also physically examine cylinders in storage or prepared for shipment to confirm that markings are legible, current and consistent with regulatory requirements.

COMPLIANCE SELF-ASSESSMENT

Don't wait for PHMSA to discover gaps. Here's how to evaluate readiness:

Immediate Assessment (This Week)

- Test your 24-hour emergency contact and make sure your provider has your most up-to-date information, including the correct contact person, current Safety Data Sheets and relevant shipping details.
- Identify hazmat employees whose training expires within 90 days, verify records are accessible and complete, and confirm training covers all four required areas.
- Review the last 10 shipments to ensure completed shipping papers, packaging selection that matches Hazardous Materials Table requirements and correct emergency contacts.
- Physically inspect a representative sample of cylinders currently in storage or prepared for shipment. Verify that requalification markings are present, legible and within the authorized test interval. Confirm that any cylinders with expired or unreadable markings have been removed from service and are not being offered for transportation.

Comprehensive Assessment (This Month)

- Create a master list of all hazmat employees with training dates and expiration tracking.
- Ensure your training program meets



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49 CFR 172.704 requirements.
- Implement a compliance calendar for recurrent training, container requalification and other obligations.
- Document procedures and responsibilities for packaging selection, classification and shipping paper preparation.
- Verify that your organization maintains a reliable system for tracking cylinder requalification status, including inspection dates, requalification intervals and authorized RINs. Confirm procedures are in place to prevent expired cylinders from being filled or shipped.

Ongoing Compliance Activities
- Subscribe to PHMSA regulatory updates, safety notices and Federal Register publications.
- Conduct quarterly internal audits of shipments, training records and emergency contacts.
- Set procedures for periodic visual inspection of cylinders during normal handling and filling operations.
- Participate in industry associations, webinars and networking.
- Engage professional consultants for complex compliance areas as needed.

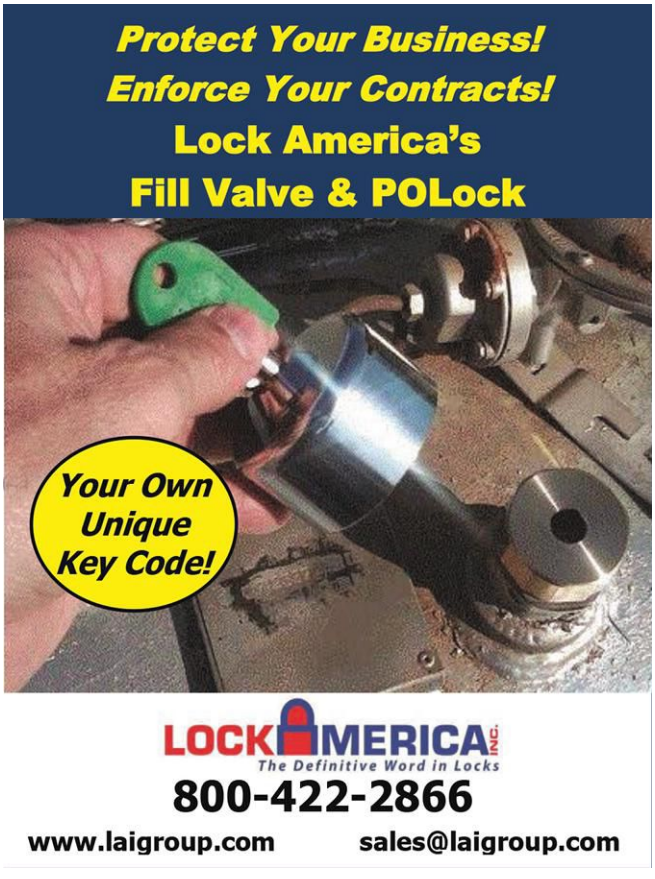
STRATEGIC VALUE OF COMPLIANCE

Compliance with hazardous materials regulations is about more than avoiding fines or enforcement actions. For propane distributors, it is fundamental to ensuring cylinders, cargo tanks and supporting systems remain safe for continued transportation and handling throughout their service life.

Companies that maintain strong safety management systems, deliver thorough training and ensure cylinders are properly inspected, requalified and documented are actively reducing the risk of leaks, fires and transportation incidents. Just as importantly, accurate shipping documentation and emergency response info enable emergency responders to act quickly and safely during incidents. Conversely, gaps in compliance or reactive approaches don't just increase regulatory scrutiny — they increase the risk of events that can cause injury, environmental damage and significant operational disruption.

Isaac Lovato helps companies navigate complex compliance questions and provides critical guidance during emergency situations. Through his work with Hazmat Line, Lovato helps organizations maintain compliant emergency response information and meet PHMSA regulatory expectations, including those related to compressed gas transport. Hazmat Line provides 24/7 emergency response phone services, ensuring companies meet DOT's regulatory requirement for immediate access to emergency information during hazardous materials incidents. Visit hazmatline.com.









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ALABAMA IS CREATING NEW EMPLOYMENT IN PROPANE & BEYOND

Boosting skilled, cross-industry trade jobs through statewide collaboration is forging a path ahead to meet workforce retainment concerns

BY TARA HUTCHISON

Alabama's growing demand for energy is creating new opportunities for workforce development in the butane and propane industries, where skilled technicians, drivers and safety professionals are increasingly vital to keeping homes, farms and businesses running efficiently.

This industry is one of the leaders in the state, with wage growth of more than 57% over 14 years. Average annual wages in the utilities sector increased by 57.9%, from $70,359 in 2010 to $111,114 in 2024. This represents one of the largest industry wage increases in the state. Areas that have seen the most growth in the mining, quarrying, and oil and gas extraction sector include the Gulf Coast, where Baldwin County and Monroe County saw wage growth of 118% and 119% respectively, and the Black Belt, where Macon County and Russell County experienced growth of 177.9% and 175.7%.

Additionally, this industry has experienced growth in the number of people employed in these occupations, increasing by 5.78% since 2015.

Energy production remains one of the nation's — and Alabama's — most important economic topics. As the state works to support and grow all industries, the Alabama Department of Workforce (ADOW) continues analyzing data from its Labor Market Information Division while working closely with business and industry partners to provide assistance where it is needed most. For example, more than half of all workers in Alabama's energy sector were age 45 or older as of 2024. This signals a need to focus attention on informing, training and motivating the next generation of workers to enter the field.

Meeting this challenge requires collaboration. ADOW works with

the business community to identify workforce strengths and gaps while partnering with the education community to ensure training aligns with real workforce needs. Recent legislation requiring increased emphasis on career and technical education in K-12 schools presents an important opportunity to work with state and local education leaders to prepare students for careers in industries like energy. By aligning education with industry needs, Alabama can ensure employers have access to skilled workers while giving students clear pathways to stable, high-wage careers.

Through Alabama's Career Centers, ADOW provides a range of services to support employers and job seekers alike. These include on-site job fairs, employee screening and free job postings to help companies recruit talent. Employers may also receive wage assistance through programs such as the Workforce Innovation and Opportunity Act (WIOA), which can reimburse up to 50% of worker wages during training periods. This allows employers to train employees to their standards while benefiting from significant financial support. WIOA also funds on-the-job training and work-based learning opportunities for younger workers.

Additional incentives include the Work Opportunity Tax Credit and federal bonding programs that support employers who hire individuals who have historically faced barriers to employment, including veterans, individuals with disabilities and justice-impacted workers.

The Alabama Office of Apprenticeship, through the ADOW, provides apprenticeship opportunities for all occupations, and can assist employers and job seekers in obtaining the training they need for the occupation they want. These apprenticeships support the growing energy and utilities sector by helping employers develop skilled workers for occupations such as electricians, line workers and other technical roles critical to modern energy infrastructure. Through the registered apprenticeship model, participants gain paid, hands-on training alongside classroom instruction, preparing them for careers in high-demand energy fields while earning industry-recognized credentials.

The Alabama STEM Council is working with educators statewide and providing training for teachers in STEM-related fields (science, technology, engineering and math) and encourages the training, hiring and recruitment of workers in these areas. Through programs such as STEM teacher externships with industry partners, educators gain

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> [The propane] industry is one of the leaders in the state, with wage growth of more than 57% over 14 years.

firsthand exposure to real-world STEM applications and bring that experience back into the classroom, helping students better understand career opportunities in fields like advanced manufacturing, engineering and energy technology. These efforts strengthen Alabama's talent pipeline and prepare students for careers that support the state's evolving energy economy.

Currently, the Alabama Department of Workforce is assisting more than a dozen energy companies with recruitment efforts and has resumes available for positions such as petroleum engineers, pumping operators, propane sales professionals, commercial driver's license (CDL) truck drivers and other technical and sales roles. In addition, approved training providers across the state offer a wide range of programs designed to prepare workers for careers in the energy sector.

Career fields such as HVAC and CDL driving are also analogous to the utilities industry. It's important to look to other fields to identify cross-training opportunities that may allow workers who are looking for a change or those who may want to learn a new trade to participate in a whole new field, which could increase their earnings, improve their quality of life and help influence industry growth. Both HVAC and CDL drivers are high-demand occupations in the state and also have some of the highest wages.

As Alabama continues to grow its energy economy, strong partnerships between industry, education and workforce agencies will be essential to building the skilled workforce needed to power the state's future.

Tara Hutchison has served as the communications director for the Alabama Department of Workforce since 2008. She is responsible for internal and external communications for the department. Prior to joining ADOW, Hutchison served as press secretary for Governor Bob Riley, where she assisted with the launch of the state's award-winning pre-K program, First Class Pre-K. She also worked as an associate producer and capitol press corps reporter for Alabama Public Television's news and current affairs programs: For the Record and Capitol Journal. She has served as chair, vice chair and vice chair-elect for the Communications Committee of the National Association of State Workforce Agencies and as a panel chair for the River Region United Way's Allocations Committee.



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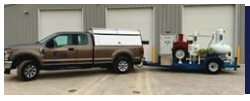




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Whitney O'Toole

Telemetry Manager

AmeriGas



How did you get your start in the propane industry?
Over 20 years ago, I was managing a Dunkin' Donuts/Baskin Robbins when a long-time customer asked me what it would take to steal me away and go work for him. It was flattering, but also terrifying as my only experience with propane was the occasional BBQs I would attend at friends and family gatherings.

What major shifts over the years have had the biggest impact on the industry, and what positive changes have you seen come from them?
Since I lead AmeriGas' telemetry program, one of the biggest shifts I have seen in our industry is the introduction and implementation of tank monitoring systems. The propane industry's willingness to embrace remote monitoring technology has driven substantial improvements in operational productivity while significantly reducing delivery costs.

Have there been any industry challenges you've encountered in your career that changed how you approach your role?
For many years, women were underrepresented in executive and senior operational roles within our industry. While women were present in administrative or support functions, it was less common to see them in leadership positions such as operations management, technical roles or executive leadership. The Women in Propane Council helped me expand my leadership development, provide mentorship opportunities and create visibility for not only me but for women across the industry. I know, I know … shameless plug — but it's all true.

Who has been the strongest influence in your career to date?
I actively listen and learn from two of my favorite speakers and motivational artists: Gary Vaynerchuk and Simon Sinek. Simon is a captivating communicator and instructor on purpose-driven leadership and 'start with the why.' Gary is one of those go-getter, no-BS motivators that just gets you excited to change the world.

What advice would you give someone just coming into the industry?
Join the National Propane Gas Association and get involved. Our industry is filled with some of the most talented, experienced and giving people within our community. Above all else, we want our industry to be successful — and that means everyone in it.

What does the Women in Propane community mean to you, and how has it influenced your experience in the industry?
What can I say … the Women in Propane community has been a keystone in my success and development over the years. I have met and become fast friends with some of the greatest people I will ever know in my lifetime.

What motivates you to keep growing in your career?
What motivates me the most is the opportunity to contribute to the long-term success of both my company and the propane industry as a whole. Our success is deeply connected — we are partners in this industry for the long haul. When we strengthen the industry, we strengthen our companies and create opportunities for everyone to grow and succeed.

What advice would you give to women who are considering a career in the propane industry?
I would encourage women to stay curious and not be discouraged if the path forward isn't immediately clear. The propane industry is full of opportunities across many areas. By asking questions, building strong relationships and continuing to learn, you can create your own path and make a real impact.

How would you spend an unexpected day off?
If I had an unexpected day off, I would probably spend it in the sun! A half day at the local animal shelter and then finish it off at the gun range. Good vibes, unconditional love and the absolute best stress relief!

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