



LPG in Europe – a look ahead

Gasdagarna

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European LPG Association
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Liquid Gas Europe - our core objectives



To identify and monitor European energy, environment, economic and research policies and any other EU initiatives of relevance for the LPG industry.



To engage in an ongoing dialogue with the European institutions to ensure that LPG benefits and potential contribution is understood and optimized in the EU legislation.



To develop regulations and standards related to LPG in cooperation with ISO (International Organization for standardization), CEN (European Committee for standardization) and the United Nations (Economic Commission for Europe).



To promote and raise awareness of LPG as a clean, safe and versatile energy source, supporting the EU's sustainability agenda.

17
National
Associations

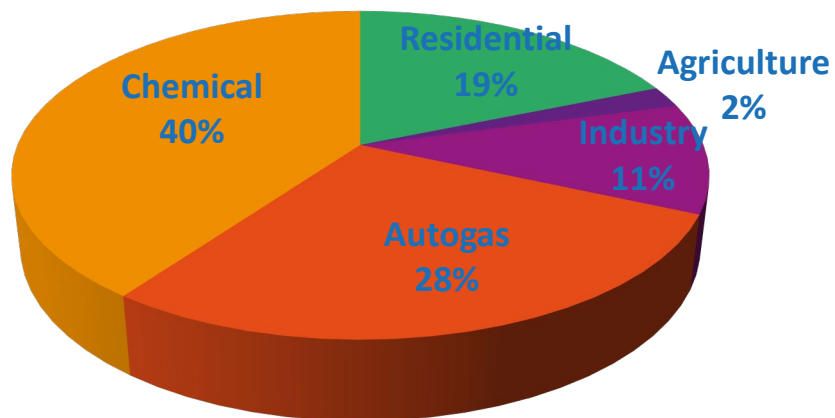
11
LPG
Distributors

25
Affiliate
members

The state of the market



Total LPG demand in 2017
= 37.6 million tonnes



Top-10 LPG retail markets in Europe

Residential:

1. Italy
2. Spain
3. France
4. Turkey
5. Germany
6. Portugal
7. UK
8. Poland
9. Romania
10. Netherlands

Autogas:

1. Turkey
2. Poland
3. Italy
4. Ukraine
5. Bulgaria
6. Germany
7. Romania
8. Greece
9. Netherlands
10. Serbia

Industrial:

1. Germany
2. UK
3. Sweden
4. France
5. Finland
6. Poland
7. Italy
8. Norway
9. Turkey
10. Greece

The EU policy framework



GHG emissions



Energy Efficiency



Renewable Energy

2020 targets

-20%

+20%

+20%

2030 targets

-40%

+32.5%

+32%

2050
CO2 objective of
80-100% reduction

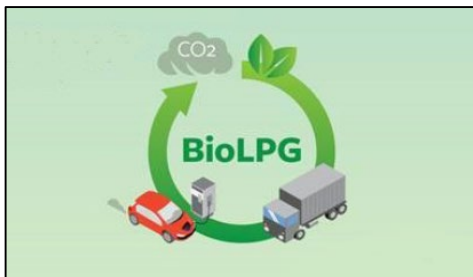
What are the winning cards for LPG?



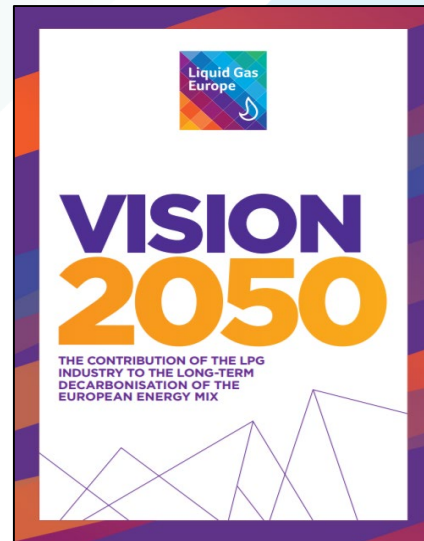
LPG promising solution to cost-efficiently address CO₂ and pollutant emissions



LPG perfectly suited for low emission technologies: thermo-solar heating, gas heat pumps, CHP, electric range extender on cars or trucks, etc.



Ramp up of bioLPG to accelerate LPG emission benefits in the long run



Strategic priorities 2019-2020 and our action plan



Leveraging EU elections



Supporting uptake of BioLPG



Upcoming revision of Energy Taxation Directive



EU ambient air quality Directives

Leveraging EU elections



Production of our industry manifesto for upcoming new MEPs



Launch of a dedicated website proposing policy solutions and measuring LPG contribution via real-world case studies – www.itsyourchance.eu

April-
May
2019

Social media outreach campaign towards EP election candidates

January
2020

Series of meetings for our industry representatives with newly elected MEPs



Case study

Process heat in extraction industry

Switching from gasoil

steam boiler to bioLPG results in:

- 78% CO₂
- 90% PM
- 60% NO_x



IT'S YOUR CHANCE... TO CLEAN UP THE AIR

400,000 PREMATURE DEATHS

Each year, 400,000 people die prematurely because of exposure to air pollution – the biggest environmental risk to health in the EU.

Particulate matter (PM) and nitrogen oxides (NOx) pose the highest health risk. They are mainly generated by the combustion of solid and liquid fuels in heating appliances and by diesel vehicles.

- TIGHTEN EU AIR QUALITY STANDARDS**
 - Align EU limits in the Ambient Air Quality Directive to WHO guidelines.
- PROMOTE 'HEALTH IN ALL POLICIES'**
 - Carefully assess the impact on air quality of all energy and transport policy proposals.
 - Monitor national implementations of the Clean Energy Package, ensuring that they lead to air quality improvements.
- CONTINUE SUPPORT FOR ALTERNATIVE TRANSPORT FUELS**
 - Speed up the implementation of the Alternative Fuels Infrastructure Directive.
 - Ensure recognition of the benefits of alternative fuels in all EU transport policy proposals.

Supporting uptake of bioLPG

- ✓ Renewable LPG included in EU definitions for biogas and renewable gases from non-biological origins
- ✓ Included in list of renewable fuels supported by the advanced biofuel target
- ✓ Production processes for bioLPG included in Annex III of Renewable Energy Directive (REDII)
- ✓ Discussions with European Commission on introduction of GHG default values for bioLPG in annex V



EU ambient air quality Directives



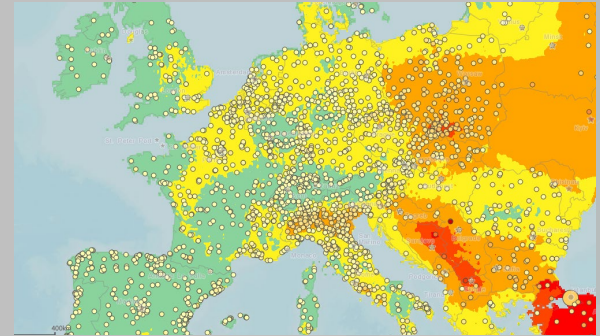
Legislation due for revision in 2020

Sets maximum limits for concentrations of PM and NOx in the air

New air quality obligations for Member States in recent EU Governance of the Energy Union Regulation

Liquid Gas Europe's views

- ❑ EU should align with more stringent requirements from WHO
- ❑ Air quality is not just an urban issue
- ❑ EU needs to accelerate shift away from coal and heating oil and to be careful with open support to biomass in heating



World Health Organization



Thank you!

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