



# LPG – today and tomorrow

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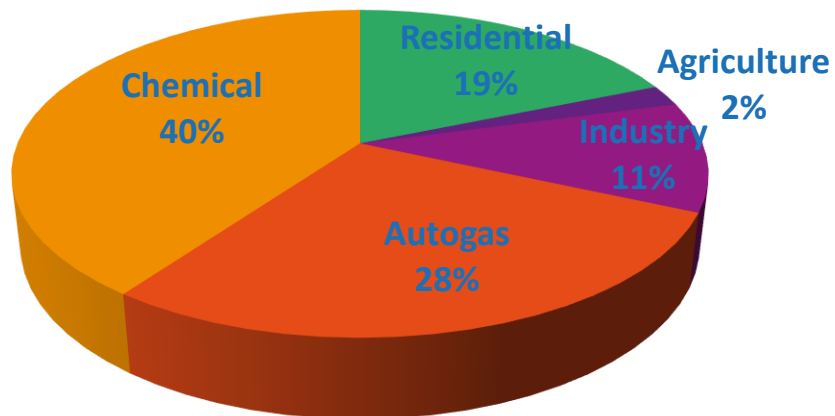
# LPG TODAY

European LPG Association  
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# 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

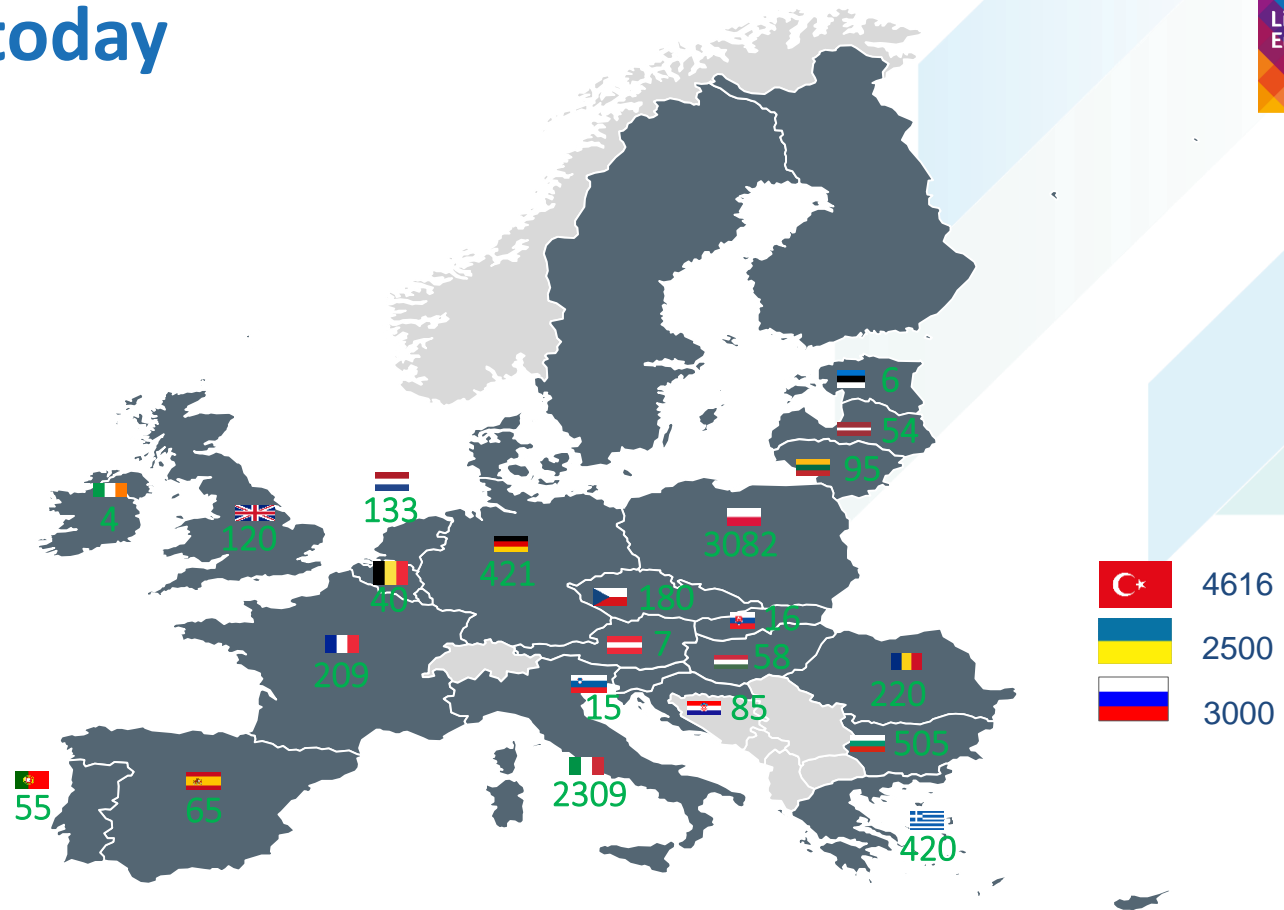
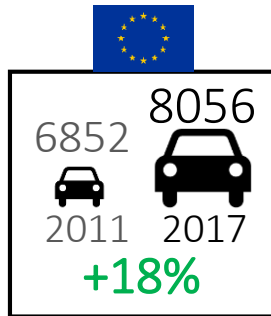
### Autogas:

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

# Autogas today



Figures are expressed in thousand vehicles, 2017 data





# LPG TOMORROW

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# The LPG industry's long term vision for autogas



**Autogas is a promising solution to cost-efficiently address both CO2 and pollutant emissions**



**The technology is ready for tomorrow**



**Ramp up of bioLPG will accelerate Autogas emission benefits in the long run**

# LPG delivers strong results in emission reductions



→ Key message to policy makers

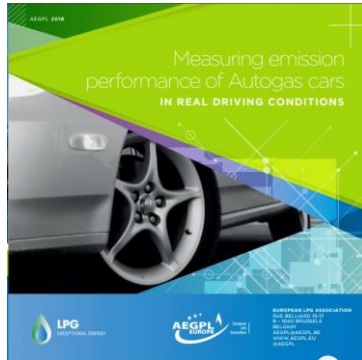
CO2 and pollutant emissions need to be tackled together

LPG is a cost-efficient solution to address both

“

Air pollution is still an 'invisible killer' and it prevents many people from living a full active life”

Janez Potocnik  
EU Environment  
Commissioner





# Technology potential



## LPG Direct Injection

- Higher fuel efficiency and lesser CO2 emissions
- No need for particles filter
- Attractive option to car manufacturers for reducing emissions at reasonable costs

## LPG Hybrid systems

- Introduced across Suzuki range
- Toyota has developed a hybrid LPG taxi with 20% less CO2 than equivalent petrol hybrid
- Many other hybrid configurations possible (plug-in, range extender for trucks etc)





# BioLPG



Up to **90 % GHG reduction** vs conventional LPG

Current yearly production in Europe: **150,000 tonnes**

Powers an estimated **190,000 LPG cars**

BioLPG could soon power **85% of the Spanish LPG fleet**

Expected production in Europe in 2022: **250,000 tonnes**

# Future outlook for production



TODAY

2040

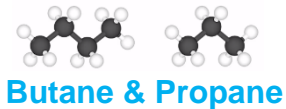
2050

Refinery co-product

Natural Gas fields

34 %

66 %



Global production of conventional LPG expected to grow by over 30%

BioGPL



Could cover up to 100% of European consumption



*“ With the right policies in place, the LPG industry believes the total fleet of vehicles could reach 10% market share in 2030 and be carbon neutral by 2040 ”*



# Thank you!

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