

Meeting Summary Midwest Propane Meeting

West Market Conference Center
150 West Market Street
Indianapolis, Indiana

Wednesday, July 25, 2001

*Sponsored by the National Association of State Energy Officials (NASEO) and the
U. S. Department of Energy*

The States of Indiana and Kentucky hosted the Midwest Propane meeting sponsored by the National Association of State Energy Officials (NASEO) and the U.S. Department of Energy's Energy Information Administration (EIA). Approximately 40 government and propane industry representatives met to discuss issues surrounding Midwest propane supply and distribution challenges. During the morning session, participants presented issues and concerns from the perspective of state governments and various sectors of the propane industry. An EIA presentation in the afternoon set the stage for discussions of recommendations for action. Please see the agenda below for more details.

Presentations of Issues/Concerns

Rick Roldan - National Propane Gas Association (NPGA) - Introduced the Purvin and Gertz study that looked at the propane market and industry situation and provided a series of recommendations about what the industry needs to do to ensure adequate supply. The Executive Summary of the report (*Propane Market Dynamics and Industry Infrastructure*) is available on their Web site - www.npga.org. One important point is that the industry has about 260 million barrels of storage - 140 million in underground supply, 110 million in customers' tanks and only about 9 million at distributors. The dealer inventory is a mere 3.6 percent of total propane storage and only 3.58 percent of annual retail sales. This creates a distribution bottleneck at the distributor level, which becomes problematic in periods of high and extended demand. While some customers have been willing to participate in summer fill programs, many do not. The real bottleneck is that 50 percent customers are "will call" customers who don't use summer fills. Dealers also have not taken advantage of hedging opportunities to stabilize prices. Changing industry, supplier relationship, and global markets are changing business relationships. This globalization is affecting markets.

A fuel storage capacity incentive to increase retail storage is needed. There is a bill before Congress for which there is a reasonable possibility of getting action that would include incentives for increased secondary storage. A statutory exemption is needed to provide waivers to the Jones Act. NPGA also supports EIA funding so we can have real up to date good quality data. We need to do a better job communicating pipeline allocation policies.

The Driver Hour Waivers issue continues to be a concern. A proposed pilot program was just announced that only deals with fuel oil deliveries. This should have also been extended to the propane industry and NPGA is

looking into what might be done to get this changed

Recommendations - (1) Have these meetings in the summer instead of the winter in a crisis; (2) Have regular meetings among the industry folks with marketers; (3) Driver hours of service issues are a real problem since DOT has shifted the responsibility to the State level and every State has a different way and legal authority to take this action. DOT has recently started a pilot with fuel oil, but left out propane which is not good for the propane delivery industry; (4) NPGA has proposed Federal incentives to increase retail storage; (5) Need for improved railroad efficiency; (6) Need for Jones Act reform; (7) Need for increased EIA funding.

Jeff Pillon - Michigan Public Service Commission - Michigan experienced a very cold December 2000 coupled with record high propane prices last year that resulted in significant increases in costs to customers. In Michigan, prices peaked at \$1.79 on January 22, 2001, still less than the over \$2.00 prices seen in North Carolina. However, Michigan customers were still paying more compared to North Carolina, due to the larger Heating Degree Day accumulation in Michigan. Costs for a typical residential propane customer went from \$954 during the winter of 1999/2000, which was also warmer than normal, to \$1,400 per year as the price went and temperatures returned to normal levels for the heating season.

Based on last winter's average price of \$1.406 per gallon, propane was selling for \$14.29 cents per million BTUs. At an average of \$1.365 per gallon last winter home heating oil was selling for \$9.84 cents per million BTUs. The residential prices for natural gas from Consumer Energy is \$6.72 per 1000 cubic feet or about \$6.54 per million BTUs, for Michigan Consolidated Gas whose rates will remain frozen till the end of the year. This price is \$5.15 per MCF, \$5.02 per million BTUs (Note: the natural gas figures include the fixed monthly customer charge.) Michigan sells more propane to residential customers than any other state, although only 6 percent of Michigan homes use propane.

In meetings, the PSC has discussed how dealers will ensure supply, what type of payment options they will offer and how to help the customers improve the energy efficiency in their homes. In addition, Jeff worked with NASEO to send a letter on hours of service issues from the states' point of view to the Federal Motor Carriers Safety Administration at US DOT. There has been no response to the letter. A copy of the letter can be found at:

http://www.naseo.org/committees/energydata/dot_letter.htm

John Buchanan - Missouri Energy Center - John has indicated that Missouri will be holding a meeting in the next few months in conjunction with the propane industry. In addition, the Governor's task force on energy will be reporting back in the next couple of months. Missouri spends about \$10 billion per year on energy; 11 percent of total income and almost all of that is imported. Last year, there were two states of emergencies declared in cooperation with the industry to avoid problems with supply. Propane is used by over 12 percent of homes for primary heating. Issues last year included the impact of a colder winter, additional "will-call" customers that affect delivery, better consumer education, and the need for some improvements in the propane distribution system.

Greg Guess - Kentucky Division of Energy - winter problems in Kentucky were similar to Michigan and Missouri in terms of a colder winter and some issues on supply. The Kentucky Attorney General has been look-

ing at cases related to pricing, supply, service and contracts, asking for refunds in some cases.

Pat Chesterman - Ferrellgas - Concerned that people are going to get into a false sense of security about price and supply this winter - there will be some price spikes and some logistical problems, the extent is unknown right now. Significant issues include the lack of transport including a lack of drivers and vehicles to meet growing demand and the time to fill at supply terminals where the wait can be 12 -16 hours. Also, common carriers are less willing to work outside 9 AM to 5 PM work day hours. Terminal upgrades needed to speed loading. Problems with pipeline allocations that need to be sorted out. Rail shipments are a problem when delays cause disruptions to the distribution system. Rail delivery has become totally unreliable - what should be 7-day delivery is turning to 2-3 week delivery. Carriers don't like to work weekends. Need to work on all these areas will take sometime to work through them. (These come from the NPGA infrastructure task force that he chairs.)

Ferrellgas is certainly concerned about higher prices since these affect its ability to sell product. As a company that is in all aspects from supply to storage to delivery, it sees and understands the full spectrum of the problems. In summary the following are some of the issues needing attention.

1. If people get into retail propane business they should have at least needs 30,000 gallons of storage. States should consider requiring this of any new dealers.
2. LIHEAP modified, most state are only in effect during the winter months. Peak price purchasing. Better for them to buy propane in the summer. The dollar constraints to small. Only purchases 100 gallons, cistern pays higher price.
3. Public Service Announcements for the coming winter encouraging summer fill are helpful.
4. DOT Hours of service waivers. Responsiveness is an issue. Takes weeks to get it a waiver when the problem is today. Your state may not be having a problem, but another state can be pulling supply from three states away to solve the problem. This needs a regional solution
5. Suppliers/Wholesaler did us no favors at many locations. We had suppliers that used force major to free up supplies of propane to be used as a substitution for natural gas. Gas plants started to make natural gas vs. propane. Producers started to burn propane rather than natural gas, which lessen the supply. Hauling product hundred of miles when we should have moves 50 compounds the distribution problems. We did not have the ability to server existing customers much less customers of companies like Level Propane who want to switch. Michigan allowed some companies to serve Levels Propane tanks last winter, which was helpful.
6. Ferrell Gas has 60 rail locations and rail shipments of propane have been completely unreliable.
7. US propane markets net importer now net exporter. That has changes the dynamics. Products have the ability to move out of the country. The international market has a big impact on the inventories. High prices last winter attracted imports.

Marty Baker - Suburban Propane - Discussed his view of the market. One significant issue was marketers depending on the spot market for supply that caused prices to spike. Another issue is the will-call customer disrupting their planning for deliveries. They do provide a residential hedging program for residential customers to allow for some protection, but others need to do the same. Small volume users are causing some problems from a routing and supply point of view; they try to supply them in the summer to avoid the problems in the win-

ter. Rail carriers have become totally unreliable.

David Archer - McIlvane Trucking - Operates 104 propane trucks and often has between 40-60 of the units sitting during most of the year, while in the winter, could use another 50-60. The problem is balancing delivery to fully utilize the capacity they have throughout the year.

All trucking companies have a shortage of qualified drivers - McIlvane Trucking has a 29 percent turnover rate, which is pretty good compared to other trucking companies. But an adequate supply of drivers is a continuing issue as is the issue of number of hours worked and the desire of drivers to work regular week day hours. The need for seasonal driver is a real problem. Fifteen years ago petroleum and propane truckers were always towards the top of the pay scale. That has changed. The Wal-Mart's, etc. are offering the top of the line pay to keep and retain drivers. Wal-Mart now has 350 distribution centers in the U.S., which shorten the drive. Drivers do not have to do long haul drive and they get home at night. Drivers want to be home with the family. The propane truck drivers are driving during the worst of the winter weather, we need to be able to offer more to get the seasonal driver, we still pay medical, dental doesn't make it any easier to get the needed seasonal driver.

Terminal waits make the driver situation even worse. The lines at terminals for loading are a big problem in the winter. When a driver is limited to 15 hours and spends 12 hours waiting in line they only have two hours before taking a break. Preferences at terminal might be given to year-round customers. Alternatively, terminals could operate like the chemicals industry, where trailers are dropped for filling and picked up later. He also reiterated need for regional waivers.

Tom Ritchey and Shorty Whittington - Grammer Industries - Repeated many of the comments regarding the scheduling of filling, the problems with getting supply and the issues of adequate infrastructure. Suggests getting larger tanks to reduce the need for return fill trips, particularly in the winter. Setting 250 gallon tanks at some homes when larger tanks should be used to reduce the transportation might be encouraged. When you have \$86,000 invested into a tractor plus the tanker can't afford to have these trucks set. I'd set larger tanks and then not fill them as often in the middle of the winter. If a customer makes a commitment to year around service their needs will be met. Customers that are "will call" may not get a delivery on a weekend. It was pointed out that buying an airline ticket 21 days in advance is much cheaper than buying today; propane needs to look at how to encourage that advance purchase.

David Williams - TEPPCO Pipeline - They have added capacity to deliver product; their continuing issue is how to allocate space to the various products they normally deliver. It is a continuing balancing act to know just how much to allocate to various products at specific times of the year. TEPCO has two pipelines leaving the Gulf Coast. It takes a 20-inch diameter line 2 week to move propane to Midwest moving at 5 miles per hour. The ability to deliver through the pipelines and the terminal is continuous 24/7; the issue is getting more fills at night, the weekends and at other times of the year. One significant issue is getting the supply away from the terminals and the pipeline closer to end-users (storage issues). Another issue is that FERC does not allow discrimination among customers - it means they have to deliver the fuels and the amounts as the customers want them - whether big or small - which can affect their ability to efficiently deliver product.

Alan McElhaney - Williams - They run over 13,000 miles of pipeline moving 900,000-barrel capacity per day. They are working on “on-demand” supply where you can call in the order and then drive right to the terminal to buy it. The supply needs have stayed pretty constant on their pipeline over the past 20 years. They continuously try to balance many issues to provide supply including customer input, weather forecasts, natural gas supplies, trucker availability, etc. They are faced with increased costs and even though they tried a \$250,000 incentive program last August (½ cent/gallon) to have an early fill program, but they didn’t get much response - they can’t make this happen alone - need it to be industry wide.

Fred Shato - MarkWest Hydrocarbon - Discussed other issues of supply including the need for additional storage areas in his region so that excess supply is not sent out of the area and then has to be brought back in the winter peak demand times. Believes that the pricing situation is disadvantageous to the refiners and storage interests to allow for cost recovery.

Alice Lippert and Dave Hinton - EIA - - Propane prices essentially follow crude oil prices. Propane demand has risen approximately 36 percent higher in a decade. Propane production for the first quarter of 2001 was down due to gas plant shut-ins in the South. About 10 percent of propane is imported and about 75 percent of imports are from Canada. Our current storage nationwide is above average and we are well positioned for the winter compared to some of the previous years; however, PADD II, the Midwest, is a concern since inventories are at the bottom end of the normal band. About 39 percent of the homes that use propane are in the Midwest. With lower storage supplies, we could have some problems, although that is hard to determine right now until the fall picture emerges with other factors such as weather, crop drying, West Coast and world-wide demand. For current information and studies, the EIA website - www.eia.doe.gov - has many resources available.

Discussion of Options/Solutions

Greg Guess introduced this session as a means of developing a list of what needs to be done, who will take it on and how will it ultimately get done. It was also suggested that this would probably lead to a continuing relationship between the state energy offices and the NPGA.

Jeff Pillon started the discussion by bringing up some specific issues; the first was summer fill, which could be a cooperative effort between NASEO and the NPGA. Storage issues might be addressed by encouraging the use of larger tanks at customer sites, encouraging dealers to have more storage, tax incentives for expanded storage, state permits for requirements for additional storage for new businesses.

The incentives such as a reduced cost - even up to 10 cents in the summer - doesn’t seem to move the customers to buy in the summer - it is probably due to the fact that propane is the fuel that isn’t billed regularly, only at the time of sale. Customers keep waiting for the lower price and that stops them from buying early.

Another suggestion was to have better coordination between the retailers (and NPGA) and the states to promote efficiency, the Weatherization Assistance Program and coordination with LIHEAP and other state services.

Rick Roldan of NPGA suggests that NASEO and NPGA develop a joint meeting to meet with DOT officials to discuss the motor vehicle safety and driver hour waiver issues and opportunities. Alice Lippert noted that a dialogue was started with the Federal Motor Carrier Safety Administration last fall.

There is an interest in having a regional approach to the need for waivers and Jim Caverly from DOE's Office of Science and Technology Policy suggested the states get together and discuss how and when to request a regional waiver. Peter Dreyfuss of the DOE Chicago Regional Office offered to help facilitate a meeting with the states and the DOT folks to develop and implement a plan that can work. The problems of defining what is an "emergency" needs to be addresses as well as the "Region" issue

There was also some discussion about using the states credit and resources to impact the market in ways such as providing insurance against price spikes. States might ensure the credit worthiness of low income to allow them to take part in, for example, level pay programs.

The following notes reflect the items discussed in the afternoon session that were shown on the screen at the front of the room.

Storage Capacity – Problem of a lack of Secondary Storage

- Encourage the use of larger customer tanks.
- Dealers need to have more storage. Problems with siting.
- Congressional action to provide tax incentives for expanded dealer storage –full expensing of petroleum and propane storage facilities. NPGA supports. Probably not going to be retroactive.
- State permits for new companies to have a required amount of storage to go into business

Encourage Summer Fill

- Industry action to promotion consumer education is important.
- State Education and promotion
 - Use of LIHEAP funds for summer fills? .
 - State energy office press releases
- Economic Incentives
- Reduce the number of will call customers or find ways to encourage them to fill up in the summer

Driver Hours of Service Waivers

- NASEO will follow up on its letter to FMCSA.
- Work out procedures with State Government, the industry and states should meet to work out how this will be done. Who are the contacts in each state?
- Work to have the pilot program fuel oil drivers to extend to propane
- Have FMCSA develop better clarity on the procedures and how this will be handled.

- States coordinate timing of HOS exemptions. SEOs should work with State PGAs
- NASEO, DOE Chicago Regional Office and NPGA work jointly to resolve FMCSA issues.
- Survey State Energy Offices to determine procedures in each state.

Supply Management

- Lines at terminal how can they be reduced.
- NPGA Infrastructure committee will look at queue management.
- Rail cars and the lack of reliable shipments

Consumer Concerns

- Customer Education
- Energy Efficiency
- Pricing Program
- LIHEAP improvements
- Good information on Market Condition

Data Issues

- EIA collection of petrochemical storage data?
- Funding for EIA

Hedging

- Some sort of government price guarantee, perhaps for low-income – credit worthiness.

Summary of Actions Recommended

1. Each State should determine how they will handle requests for Driver hour waivers, what the legal authorities are and their limitations and what criteria might be used to determine when waivers might be appropriately granted
2. Each State should meet with their propane associations/industry on the procedures.
3. Each State should provide a brief written summary to NASEO explaining the issues the states perspective and what limitations might exist with current authorities. This will be used to peruse this issue at the national level.
4. Each State should look at how its LIHEAP program operates to determine if it handles the needs of deliverable fuels efficiently. Are summer fills and option? Delivery of full tanks better from a supply perspective than making two small deliveries. How id this handled.
5. NASEO should work with NPGA to meet with the FMCSA to seek resolution to the problem of Driver hour Waivers. The issue of having the pilot program for fuel oil drivers to extend to propane will

- also be investigated.
6. NGPA will work to look for solutions to reduce the wait time at terminals as a way of reducing the need for Driver Hour Waiver requests.
 7. State Energy Offices and the Propane industry should encourage summer fills and energy efficiency.
 - a. Public service announcements might be used. States could work in conjunction with the propane industry to get the message out or could independently make the case for the value of summer fills.
 - b. Payment program by the propane dealers should be considered, if not already offered, to provide for more stable pricing.
 - c. Both States and the propane industry should provide information on how to use propane efficiently to help keep bills down to manageable levels. This can potentially help reduce bad debt, aid in customer retention and help the industry be competitive.
 - d. The Propane Education & Research Council www.propanecouncil.org might be able to provide some assistance and materials to dealers in helping to carry this message.
 8. The Department of Energy should look into the problem of unreliable rail shipments of propane and make recommendations of what might be done to improve the reliability of these shipments. The lack of reliable shipments effects price volatility and cause distribution problems DOE should consider working with the Railroad Association and Pipeline/Terminals to improve the system for receiving and loading propane.
 9. NPGA, etc conduct/sponsor a "Hedging/Risk Management" workshop for propane dealers so that they are better able to offer more stable pricing program to their customers.
 10. NASEO and NGPA support the need for adequate and ongoing funding of EIA programs to assure that the information needed by the propane industry and its customers remains available.
 11. EIA should investigate the issue of propane inventory held by the petrochemical industry, which is not currently captured in EIA data collection. This industry can causes huge swings in demand, which in turn can have a major price effect. Knowledge of the inventory held by the petrochemical industry would provide a better overall supply picture.

Agenda
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Registration 8:00 a.m. – 8:30 a.m.

Welcome 8:30 a.m. – 8:45 a.m. —15 minutes

- Welcome and meeting logistics – Niles Parker, Director, Energy Policy Division, Indiana Department of Commerce
- Purpose of meeting and Introductions – Greg Guess, Program Manager, Kentucky Division of Energy

Presentation of Issues/Concerns 8:45 a.m. – 11:30 a.m.

1. National Propane Gas Association – Areas of Concerns – 20 minutes
 - Rick Roldan, Vice President, Government Relations, NPGA
2. State Energy Offices Perspective – 20 minutes
 - Greg Guess, Program Manager, Kentucky Division of Energy
 - Jeffrey R. Pillon, Manager Statistical Analysis, Michigan Public Service Commission
3. Propane Distributor Perspective – 30 minutes
 - Pat Chesterman, Executive Vice President and COO, Ferrellgas
 - Marty Baker, Jr., Regional Manager, Suburban Propane
4. Transportation Issues – 20 minutes
 - David Archer, VP Sales/Marketing-LPG, McIlvaine Trucking, Inc.
 - Shorty Whittington, President, Grammer Industries Inc.
5. Pipeline and Terminal Issues – 20 minutes
 - David Williams, Manager, TEPPCO Products Pipeline
 - Alan McElhaney, Manager, Commercial Operations, Williams
6. Current Propane Market Status – 15 minutes
 - Alice Lippert, Economist, Energy Information Administration, DOE

Midwest Propane Meeting Summary

Lunch 11:30 a.m. - 1:00 p.m.

Discussion of Options/Solutions 1:00 p.m.-3:00 p.m.

Jeff Pillon, Greg Guess

1. Storage Capacity
 - Inventory
2. Supply Management
 - Rolling stocks
 - Additional hours
 - Additional racks
3. Summer fills
4. Consumer Education, energy efficiency and pricing programs, etc.
5. Risk management
 - Training of staff
6. Terminal Operations
 - Queue management
 - Assigned window

Summary of Conclusions and Actions Items

Evaluation Form
Summary of Responses
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Please complete this evaluation form and provide any additional comments you believe would be useful.

Please rank the following, *one* as no/poor up to *six* as yes/excellent.

Program Issues	0=no response no/						
National Propane Gas Assoc. Areas of Concerns	1	2	3	4	5	6	
				2	7	9	
State Energy Offices Perspective	1	2	3	4	5	6	0
			1	6	6	4	1
Propane Distributor Perspective	1	2	3	4	5	6	
			1		11	6	
Transportation Issues	1	2	3	4	5	6	
			1	2	8	7	
Pipeline and Terminal Issues	1	2	3	4	5	6	
			1		11	6	
Current Propane Market Status	1	2	3	4	5	6	
			1	3	9	5	
Did the program address the topics that Were of most concern/interest to you?	1	2	3	4	5	6	
			1	1	13	3	
Were audio-visual and written materials appropriate?	1	2	3	4	5	6	0
		1	1	4	8	3	1
Facilities/Logistics							
Were all presenters clearly audible?	1	2	3	4	5	6	0
			3	5	7	2	1
Were the visual presentations clear from your seat?	1	2	3	4	5	6	
			2	1	11	4	

Other comments:

1. "If the suggestions and ideas that came out of this meeting are followed up and possibly able to be finalized, this meeting would be a great time spent."

2. "More cooperation needed." [Regarding Propane Distributor Perspective, Transportation Issues and Pipeline and Terminal Issues.]
3. "Stocks good." [Regarding Current Propane Market Status.]
4. "The wait times at terminals need more attention. Secondary storage should be increased. Operations need to be better utilized versus crises management. Switch to alternate fuels if possible."
5. "Very good meeting—learned a lot!!"
6. "Excellent format—Needs to be ongoing."
7. "Microphone would have been better."
8. "Well worth the time! God job."
9. "Great job with the meeting!"
10. "Lots of input from knowledgeable people expressing their side of the story. Everyone should have a better understanding of the issues that were in attendance. Good discussions. Need copy of the minutes."
11. "Good meeting—lots of idea starters. Thanks for pulling al these folks together!"
12. "I think the key is that these are all interconnected concerns. Speakers fed off each other, explained interactions." [Regarding Program Issues: National Propane Gas Assoc. Areas of Concern, State Energy Offices Perspective, Propane Distributor Perspective, Transportation Issues, Pipeline and Terminal Issues and Current Propane Market Status.]
13. "State association executives would be a willing resource for help planning your next meeting."

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