Pricing Transparency & Station Locator

Propane Autogas Technology Forum

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Golden, Colorado

11/13/14
Clean Cities

Clean Cities Mission
To advance the energy, economic, and environmental security of the U.S. by supporting local decisions to reduce petroleum use in transportation.

Provides a framework for businesses and government to work together

**Goal:** Reduce U.S. petroleum use by 2.5 billion gallons per year by 2020

- Over 1 Billion gallons in 2013
Clean Cities Coalitions

Nearly 100 coalitions throughout the United States

* Connecticut Clean Cities Include:
  - Norwich
  - New Haven
  - Connecticut Southwestern Area
  - Capitol Clean Cities (Hartford area)

Map Date: 07/23/14
Alternative Fueling Station Locator

- Began in mid-1990s
- Fuels:
  - Biodiesel (B20 and above)
  - Compressed natural gas (CNG)
  - Electric vehicle supply equipment (EVSE)
  - Ethanol (E85)
  - Liquefied natural gas (LNG)
  - Propane (liquefied petroleum gas)
  - Hydrogen

- Includes all public and private fueling stations in the United States, as well as planned stations
  - Does not include residential or off-road vehicle fueling sites
Alternative Fueling Station Locator

Find alternative fueling stations near an address or ZIP code or along a route in the United States. Enter a state to see a station count.

2,982 propane stations in the United States
Including private stations
Including planned stations

Location details are subject to change. We recommend calling the stations to verify location, hours of operation, and access.

About the Data

Download Data
Developer APIs
Data Sources

- Industry Websites
- User Input
- Industry Collaborations
- Clean Cities Coordinators and Stakeholders
- Industry Publications

Station Locator
Infrastructure Growth – 5 Years

U.S. Propane Fueling Stations

2008 2009 2010 2011 2012 2013
Ongoing Industry Working Group

• Participating Organizations
  – AmeriGas
  – Arro Autogas
  – Blossman Gas
  – Blue Star Gas
  – CleanFUEL USA
  – Ferrellgas
  – PERC
  – Phillips Energy
  – ROUSH CleanTech

• Discussion Topics
  – Retail autogas pricing
  – Station data collection methodology
  – Increased marketer awareness
    • Retail staff training
  – Station Locator improvements
    • Station classifications
Primary and Secondary Station Categories

- Stations are considered “primary” if:
  - The price of a gallon of propane autogas, including all taxes, at the station is less expensive than other propane sold (e.g., gas grill bottles, bulk distribution)
  - The station accepts credit cards

U-Haul
15660 W Colfax Ave
Golden, CO 80401
303-279-9696

Directions | Find Nearby Stations
Access: Public
Hours: 7am-7pm M-Th and Sat, 7am-6pm F, 9am-6pm Sun
Payments accepted: American Express, Checks, Cash, Discover, MasterCard, VISA
Notes: Colfax and I-70 across from Toyota dealership.

Fuel Available
Liquefied Petroleum Gas (Propane)
Services: Primary - Dedicated vehicle services and special vehicle fuel pricing available.

Last confirmed: November 2014

Location details are subject to change. We recommend calling the stations to verify location, hours of operation, and pricing.

Independent Propane Co
67302 US Highway 285
Pine, CO 80470
303-838-9880

Directions | Find Nearby Stations
Access: Public
Hours: 8am-5pm M-F
Payments accepted: Cash, MasterCard, VISA
Notes: At Highway 285 and Windcrest Drive

Fuel Available
Liquefied Petroleum Gas (Propane)
Services: Secondary - Fuel available for use in vehicles, but no vehicle services or vehicle fuel-specific pricing available.

Last confirmed: November 2014

Location details are subject to change. We recommend calling the stations to verify location, hours of operation, and pricing.
Liquefied Petroleum Gas (Propane) Stations

Because many propane stations serve customers other than drivers and fleets, NREL collaborated with the industry to effectively represent the differences. Each propane station is designated as a "primary" or "secondary" service type. Both types are able to fuel vehicles. However, locations with a "primary" designation offer vehicle services and fuel priced specifically for use in vehicles. The details page for each station lists its service designation.

**Note that several states, including Alabama, Arkansas, California, Florida, Idaho, Indiana, Kansas, Louisiana, Missouri, New Mexico, Oklahoma, Texas, and Washington, require or allow in-state propane vehicles to obtain a decal in lieu of paying state fuel taxes at the pump. Out-of-state vehicles may still be subject to taxes at the pump. Determinations about price differential (for the purposes of the primary or secondary propane station designation) were made assuming that the vehicle has an in-state decal. For more information about state decals and similar laws and regulations, visit the AFDC Laws & Incentives database.

http://www.afdc.energy.gov/fuels/data_methods_stations.html
### Primary and Secondary Station Categories

<table>
<thead>
<tr>
<th></th>
<th>Primary</th>
<th>Secondary</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>U-Haul</strong></td>
<td>519 (91%)</td>
<td>51 (9%)</td>
</tr>
<tr>
<td><strong>Non-U-Haul</strong></td>
<td>654 (31%)</td>
<td>1466 (69%)</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>1173 (44%)</td>
<td>1517 (56%)</td>
</tr>
</tbody>
</table>

#### Public station trends by marketer:
- AmeriGas: 22% primary
- ARRO Autogas: 73% primary
- Blue Star Gas: 10% primary
- CleanFUEL USA: all primary
- Ferrellgas: 19% primary
- Phillips Energy: all primary
• Gathered prices from approximately 325 stations in early 2013
  – 84% categorized as primary
  – Average price for autogas was $2.80/gallon based on sample
  – Difference between autogas price and other propane at primary stations was $1.00/gallon

• **NOTE:** This price collection effort was not formal, nor was it related to the Alternative Fuel Price Report.
Price Reporting - Next Steps

- Alternative Fuel Price Report (AFPR) Focus Groups
  - Clean Cities Coordinators
  - Industry partners / end users
- Conduct another informal price collection effort at the beginning of 2015
- Implement new AFPR reporting tool for Coordinators
- Continued education for Coordinators
Ongoing Coordination

• **Propane industry outreach & collaboration**
  – Increase partnerships between coalitions, fuel providers, and propane marketers.
  – Increased communication will produce better data.
    – *Better station data = better pricing data*

• **Increase the number of primary locations**
  – What’s needed to help secondary stations become primary?

• **Primary / secondary classification improvements**
  – Minimum dispenser pressure?
    – 2, 4, 6, 8? – *how do we negotiate?*
  – Ingress / egress?
    – *Planning / preparing stations for larger vehicles*
Questions?

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