



Annual Retail Propane Sales Report

Annual U.S. Odorized Propane Sales by State and Segment

Report Year: 2018

Conducted by ICF on behalf of the Propane Education & Research Council

Please complete the written form and return before:

May 31, 2019

This form can be completed either by direct mail, fax, sent via email, or you can contact the ICF Call Center. The Annual Report can also be completed via the Online Reporting Site.

Return Mailing Address:

ICF
Customer Care Services
C/O: Annual Retail Propane Sales Report
980 Beaver Creek Drive
Martinsville VA 24112

Report Email Contact:

SalesReport@propane.com

ICF Fax:

Fax - **855-254-5878**

Online Reporting Site:

www.Propane.com/SalesReport

ICF Call Center:

Toll Free Number - **855-846-2924**
9 a.m. – 7 p.m. EST
Monday through Friday

To request user credentials for the Annual Retail Propane Report online forms, please email SalesReport@Propane.com and include your name, company, a valid corporate email account, and your role at the company.

Information Regarding the 2018 Retail Propane Sales Report

The Annual Retail Propane Sales Report is a joint initiative between ICF and the Propane Education & Research Council (PERC). The 2018 Retail Propane Sales Report is undertaken to determine the odorized propane sales to end-use sectors for the calendar year 2018 and will be the only source of state-level end-use sector sales information for odorized propane.

Reason for the Retail Propane Sales Report:

Information for state level and end-use odorized propane sales is required by PERC in order to fulfill specific requirements of the 1996 Propane Education and Research Act (PERA). Under the PERA Act, 20 percent of assessment collections are eligible for rebate back to the states. The allocation of the rebate between the states is determined by the percentage of the total odorized propane sales in each state.

PERA also places limits on the share of total PERC investment in the on-road market to no more than the share of the total propane market used for motor vehicle combustion, and sets a minimum of five percent of total assessments that must be allocated to the agricultural sector. This report is the only available source of retail propane sales by state and end-use sector.

The allocation of odorized propane sales between the states has a significant impact on the PERC allocation of expenditures. Each state's allocation of rebate funds is based on the latest retail sales data for residential, commercial, industrial, internal-combustion engine fuel, agricultural uses, and sales to retail dispensers that are compiled using the responses to this report. As a result, the reporting of sales volumes from propane retailers is a critical component of the PERC budgeting process.

Confidentiality Guidelines for Participant Responses:

ICF and the PERC understand that the U.S. retail propane market is a highly competitive market. Any and all company and contact information that is collected as part of this annual report will be held under ICF's Confidential Information data handling guidelines.

Proprietary or confidential information provided by report participants and developed by ICF as part of the Annual Retail Propane Sales Report shall be clearly labeled and identified as Confidential Information and stored in a manner consistent with ICF's standard practices. Confidential Information shall not be disclosed by ICF to third parties, or used for anything other than the stated purpose of completing the Annual Retail Propane Sales Report.

State level total and end-use sector sales information will only be published where sales and account information was provided by three or more separate entities. State level end-use sector information without three or more respondents will not be disclosed in any reports.

Annual Retail Propane Sales Report Participants

All active propane retailers that sell odorized, or retail, propane to end-use customers are requested to report propane sales as part of the Annual Retail Propane Sales Report. Each company can elect to report sales for each subsidiary or operating company separately or report the parent company total sales for each state.

The list of companies active within each state is developed in collaboration between ICF, PERC, and each state propane agency. These participant lists are used in the communication with each company during the participant reporting period and are updated each year to reflect changes in contact information and corporate structure, such as mergers and acquisitions, office closures, and expansion to new states.

End-Use Sales Sector Definitions

Where possible, all retail propane sales information should be reported at the state level for each end-use sector and sub-sector. In the event a company only is active in one end-use sector, please provide that sector's totals a company does not have sales in a given end-use sector, please provide sales information for that end-use sector and company total.

Residential Sector:

Residential propane sales **include** odorized propane delivered to and used by residential consumers at their place of residence for fixed applications. Uses include space heating, water heating, cooking, spa/pool use, and other household uses. Residential sector sales include delivery and replacement of 100-pound cylinders attached at fixed locations.

Residential sales **does not** include household use of propane from 20-pound (or similar) cylinders used for portable appliances and applications.

Commercial Sector:

Commercial sector propane sales **include** odorized propane delivered to and used by commercial entities, such as schools, hospitals, retail outlets, office buildings, and other types of non-industrial outlets. Commercial sales also includes propane used in on-site standby or backup electric generation at the facility.

Commercial sales **does not** include propane used forklifts or engine use.

Agricultural Sector:

Agricultural sector propane sales **include** odorized propane delivered to and used by agricultural entities that are primarily engaged in growing crops, raising animals, or other agricultural products. Agricultural sector sales also includes propane used for grain drying, agricultural harvesting activities, weed control, radiant heating systems, crop irrigation engines, and other related agricultural applications.

Agricultural sales **does not** include propane used by agricultural customers in other internal combustion engine applications. Sales for these uses should be reported in the Internal Combustion category.

Industrial (Non-Forklift) Sector:

Industrial (non-forklift) sector propane sales **include** odorized propane delivered to and used by industrial or manufacturing facilities for process heating, large scale combined heat and power systems, distributed generation, or as a fuel for furnaces.

Industrial sales **does not** include propane used by industrial customers in forklifts or other internal combustion engines. Sales to forklifts and internal combustion engines should be reported as Internal Combustion and is not included in industrial (non-forklift) sector.

Cylinder Markets:

Cylinder Market sector propane sales **include** odorized propane delivered to and used in a 20-pound (or similar) cylinder. Information on cylinder market sales volumes were reported by participating companies using the following two sub-categories:

- **Consumer Bottle Refill & Exchange:** Direct sales **include** residential, or individual use bottle exchange programs. Includes bottle filling programs at grocery stores, gas stations, campgrounds, and other individual-use sites.
- **Rental Yards / RV Refill Stations / Other:** Direct sales **include** large direct consumer cylinder program managers. Cylinder Market propane sales **does not** include sales used in public autogas fueling infrastructure to companies such as Pilot, Menards, and U-Haul, which should be reported in the autogas section.

Cylinder Market propane sales **does not** include wholesale or bulk propane sales to other propane retailers, fixed 100-pound (or similar) cylinders attached at residential locations, or cylinders used by forklifts, commercial mowers, or other types of internal combustion engines.

Internal Combustion:

The Internal Combustion sector propane sales include odorized sold for use in internal combustion engines. Information on internal combustion sales volumes should be reported by participating companies using the following three sub-categories:

- **Propane Autogas:** All other odorized propane use by Internal Combustion engines for On-road vehicles. Can either be consumed from cylinders or directly.
- **Material Handling (Forklifts):** Only includes odorized propane use by forklifts at commercial and industrial sites, as well as airport and port equipment. Propane can be consumed either in cylinders or directly.
- **Non-Road:** Only includes propane used by commercial mower, outdoor power equipment, golf equipment, ATVs, or other non-road vehicles. Propane can be consumed in either cylinders or directly. Internal combustion sales **does not** include sales for agricultural irrigation engines.

When sub-sector sales information for the Internal Combustion end-uses is not available, report participants should use their best judgment in allocating this sector's retail propane sales to specific categories. In the event no sub-sector sales information is available, report participants should report total Internal Combustion sales a sub-total for this end-use sector.

Additional Reporting Definitions:

- **Company:** Sales volumes should only be reported for the parent company of the record. If reporting for a subsidiary company please make sure to document the parent company account.
- **Reporting State:** Only report sales volumes for the state listed in the form. State reporting should be the point of consumption, not where the propane is odorized or the point of sales.
- **Sales Units:** All propane sales volumes should be reported in gallons.
- **Year of Reporting:** Report sales volumes only for the Calendar Year 2018 – January 1, 2018 through December 31, 2018.
- **Sales Volumes Included in the Report:** Only report sales for odorized propane that is to be consumed within the U.S. Do not include sales to wholesales, bulk sales to other retailers, or exports.
- **Customer Accounts:** Report the total (or best estimate) number of accounts for each sales category at the end of the reporting year, December 31st, 2018. If not available for each category, please provide the total number of accounts.



Reporting Year 2018: Annual Retail Propane Sales Report

Updated Report Participant Contact Information for Report Year 2018

A reporting form has been mailed to the representative identified for each state in which the propane retailer has active operations. It is the responsibility of this report participant to complete the reporting forms and notify ICF of any updates to the company's point of contact. If completing the report for multiple states please make additional copies of the extra state-level forms provided.

Please provide updated contact information:

Parent Company	
Contact Person	
Address	
City, State Zip Code	
Email	
Phone Number	

Updated Corporate Information for Report Year 2018

Please check any changes that have occurred since the last reporting year: If there has been any change in the company's corporate structure, such as a merger, divestment, acquisition, or any other changes please provide an update of these changes below.

Was your company acquired in 2018? Yes No

Which corporate entity acquired the largest portion of your accounts? _____

Did your company make any acquisitions in 2018? Yes No

Which corporate entity(ies) were acquired? _____

Do your responses include volumes from acquired/divested companies? Yes No

If so, please detail which states are impacted. _____

Were there any other corporate changes in 2018? Yes No

Example: Entry/exit into new states, changes in company name (Parent or Subsidiaries), bankruptcy, etc.

If so, please detail those changes.



Reporting Year 2018: Annual Retail Propane Sales Report

Reporting State: _____

Reporting Company: _____

Company Characteristics

Check the box that most closely aligns with your Company's Total Operations. This information will only be used for data verification and for estimating National total sales levels and will not be published in any form.

Number of Outlets / Retail Locations	State Total:			National Total:		
	Less than 50	51 to 100	101 to 200	201 to 500	501 to 1,000	Over 1, 000
Number of Total Employees (National)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Range of Total Company Annual Revenue (\$Millions)	Less than \$1 <input type="checkbox"/>	\$1 to \$5 <input type="checkbox"/>	\$5 to \$10 <input type="checkbox"/>	\$10 to \$50 <input type="checkbox"/>	\$50 to \$100 <input type="checkbox"/>	Over \$100 <input type="checkbox"/>

Company Questionnaire:

How many states does your company sell propane within? _____

Does your company own propane storage? Yes No

If yes, then how much? _____

Does your company contract for propane storage? Yes No

If yes, then how much? _____

What are the key factors influencing Year-on-Year changes in consumption?

- None Acquisitions Customer Growth
 Weather Divestments Other: _____

Which retail sectors are your primary focus?

- Residential Propane Autogas Forklift
 Commercial Agriculture Other: _____
 Industrial Cylinder Exchange

Retailer Fleet Operations

The following questions are related to only equipment that your company owns and operates as part of your retail operations.

Vehicle Type	Number of vehicles owned and operated	Number of dedicated autogas or dual-fuel vehicles
Bobtails		
Transports		
Other Vehicles		



Reporting Year 2018: Annual Retail Propane Sales Report

Reporting State: _____

Reporting Company: _____

2018 Sales of Odorized Propane Sales by Sector

Retail Propane Sales should include all sales to end-users as well as cylinder sales to resellers. Reported sales **does not** include any wholesale propane sales or sales to other propane retailers. Report all sales figures in **gallons** for calendar year 2018.

Sector	Sub-Sector	Gallons Sold	Customer Accounts (#)
Residential			
Commercial			
Total Residential / Commercial			
Industrial (Non-forklift)			
Agriculture			
Cylinder Markets	Consumer Bottle Refill & Exchange		
	Rental Yard / RV Refill Stations / Other		
	Total Cylinder Markets		
Internal Combustion	Autogas Sales		
	Material Handling (Forklift)		
	Non-Road		
Total Internal Combustion			
Total Sales within the State			

Please input propane sales for each Sector and Sub-Sector. If an exact sub-sector estimate is not available please provide your best estimate of the company's total sales volumes.

Do your responses include volumes from Acquired / Divested Companies?

Please list any companies affected by these changes and if the reported volumes are included or excluded for this submission:

Reporting Year 2018: Annual Retail Propane Sales Report

Reporting State: _____

Reporting Company: _____

2018 Sales of Odorized Propane Sales by Sector

Retail Propane Sales should include all sales to end-users as well as cylinder sales to resellers. Reported sales **does not** include any wholesale propane sales or sales to other propane retailers. Report all sales figures in **gallons** for calendar year 2018.

Sector	Sub-Sector	Gallons Sold	Customer Accounts (#)
Residential			
Commercial			
Total Residential / Commercial			
Industrial (Non-forklift)			
Agriculture			
Cylinder Markets	Consumer Bottle Refill & Exchange		
	Rental Yard / RV Refill Stations / Other		
	Total Cylinder Markets		
Internal Combustion	Autogas Sales		
	Material Handling (Forklift)		
	Non-Road		
	Total Internal Combustion		
Total Sales within the State			

Please input propane sales for each Sector and Sub-Sector. If an exact sub-sector estimate is not available please provide your best estimate of the company's total sales volumes.

Do your responses include volumes from Acquired / Divested Companies?

Please list any companies affected by these changes and if the reported volumes are included or excluded for this submission:

If reporting propane sales for more than one state, please make a copy of this form and return it with the full submission.

Additional forms can also be downloaded at Propane.com/SalesReport