

Propane-Provider Fleet Survey 1993

Preliminary Estimates

In 1993, the fleets of U.S. companies in the business of providing propane to consumers comprised 81,049 vehicles. The makeup of these fleets was as follows:

- 54 percent conventional-fuel vehicles, operating on motor gasoline or diesel fuel alone (Table 1)
- 41 percent dedicated propane vehicles, operating solely on propane
- 5 percent dual-fuel propane vehicles, operating on a combination of propane and either motor gasoline or diesel fuel
- Less than 1 percent compressed natural gas vehicles, operating on compressed natural gas alone or on a combination of compressed natural gas and either motor gasoline or diesel fuel.

These preliminary estimates are based on data from the Propane Provider Fleet Survey, which the Energy Information Administration (EIA) conducted between June 1 and September 30, 1994. The survey consisted of (1) a mail survey of the 35 largest propane providers,

based on the volume of propane sales reported in *LP-Gas Magazine*, and (2) a telephone survey of 100 companies, randomly drawn from 7,770 smaller providers.¹

This survey was undertaken in partial response to Section 407 of the Energy Policy Act of 1992 (EPACT), which directs EIA to collect data that will be useful to those who wish to manufacture, convert, sell, own, or operate alternative-fuel vehicles or facilities. EIA began by collecting data on fleets operated by propane, electricity, and natural gas providers because they operate most of the alternative-fuel vehicles now in use and because they will be among the first groups who will be required to buy alternative-fuel vehicles for their fleets in the future. Propane is considered an alternative fuel under the provisions of EPACT.

The companies were asked to provide information on their fleets, such as fleet size; distribution of fleet vehicles among size classes, fuel types, and alternative-fuel technologies; fleet-vehicle retirements, acquisitions, and

¹“Top 35 U.S. LPG Retailers,” *LP-Gas Magazine*, June 1993, p. 22.

Table 1. Fleet Vehicles Operated by Propane Providers by Type of Vehicle, 1993

Type of Vehicle	Light-Duty Vehicles						Medium- and Heavy-Duty Trucks		All Vehicles
	Passenger Cars	Mini-vans	Full-Size Vans	Small Pickup Trucks	Large Pickup Trucks	Sport/Utility Vehicles	8,501-26,000 Pounds	26,001 Pounds or More	
Conventional-Fuel	Q	Q	1,554	581	8,035	574	10,109	17,439	43,520
Motor Gasoline Only	Q	Q	1,529	580	6,356	570	7,684	2,248	24,195
Diesel Fuel Only	1	0	25	1	Q	4	2,426	15,190	19,326
Propane	224	14	Q	1,230	9,632	44	14,724	11,235	37,438
Dedicated	150	8	Q	1,053	6,995	44	14,040	10,502	33,115
Dual-Fuel	74	6	12	177	2,638	0	684	733	4,323
Compressed Natural Gas	2	0	22	17	46	0	4	0	91
Dedicated	0	0	4	6	21	0	0	0	31
Dual-Fuel	2	0	18	11	25	0	4	0	60
Total	Q	Q	1,911	1,828	17,713	618	24,837	28,673	81,049

Q=Data withheld because of high levels of sampling error.
 Note: Totals may not equal sum of components due to independent rounding.
 Source: Energy Information Administration, Form EIA-885, Propane Provider Fleet Survey.

conversions planned in 1994; fleet-vehicle fueling practices; vehicle fuel consumption; vehicle miles traveled; availability of fleet vehicles for company employees; length of service for fleet vehicles; source of alternative-fuel vehicles (manufacturer or conversion); and vehicle costs.

Preliminary analysis of the data reveals that:

- Although the 35 largest propane providers supply almost two-thirds of the propane delivered in the United States, they operated only 29 percent of all the fleet vehicles operated by propane providers, while the smaller providers operated 71 percent of the total vehicle stock (Table 2).
- The fleets of the 35 largest propane providers contained three times as many light-duty vehicles fueled by propane as light-duty vehicles fueled by motor gasoline or diesel fuel, and nearly five times as many medium- and heavy-duty trucks fueled by propane as medium- and heavy-duty trucks fueled by conventional fuels. In contrast, the fleets of the smaller

providers contained twice as many conventional-fuel vehicles as propane vehicles.

- Of the vehicles operated by the top 35 providers, 72 percent were medium- or heavy-duty trucks, 21 percent were light-duty trucks, and only 7 percent were passenger cars or vans. However, of the vehicles operated by the smaller providers, only 64 percent of the vehicles were medium- or heavy-duty trucks, and 36 percent were light-duty trucks, passenger cars, and vans.

The data presented herein are provisional because not all responses had been received. The final estimates of the Propane Provider Fleet Survey will be available in early 1995, with results from the surveys of the electricity and natural gas providers available shortly thereafter.

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Table 2. Fleet Vehicles Operated by Propane Providers by Size of Company, 1993

Company Category and Type of Vehicle	Type of Vehicle			Total
	Motor Gasoline or Diesel	Propane	Compressed Natural Gas	
35 Largest Companies	4,515	18,712	91	23,318
Light-Duty Vehicles	1,598	4,797	87	6,482
Cars and Vans	1,266	340	24	1,630
Pickup Trucks and Sport/Utility Vehicles	332	4,457	63	4,852
Medium- and Heavy-Duty Trucks	2,917	13,915	4	16,836
All Other Companies	39,005	18,726	0	57,731
Light-Duty Vehicles	14,375	Q	0	21,057
Cars and Vans	Q	Q	0	Q
Pickup Trucks and Sport/Utility Vehicles	8,858	Q	0	15,307
Medium- and Heavy-Duty Trucks	24,631	12,044	0	36,674
Total	43,520	37,438	91	81,049

Q=Data withheld because of high levels of sampling error.

Note: Totals may not equal sum of components due to independent rounding.

Source: Energy Information Administration, Form EIA-885, Propane Provider Fleet Survey.