The ADEPT Group, Inc.

Services at the interface of energy, economics and environment

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May 30, 2000

SURVEY TO ASSESS NEAR-TERM DEMAND FOR HEAVY-DUTY LPG POWERED TRUCKS

Submitted to the following:

Project Stakeholders

National Renewable Energy Laboratory, Natural Resources Canada, Propane Education and Research Council, Railroad Commission of Texas Alternative Fuels Research and Education Division, South Coast Air Quality Management District, Western Propane Gas Association

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I. Background

This survey was to assess near-term demand in the United States for LPG[1] (liquified petroleum gases) powered engines for medium heavy-duty (14,001-33,000 lbs. GVW) or larger trucks.

II. Methodology

A. Survey

The survey form was prepared. Survey forms were sent to 256 fleet executives (Appendix 2).[2] 33 usable[3] surveys were returned.

B. Findings

- 5.5% of the sampled industry executives stated a quantifiable interest to buy trucks powered by an ultra low emissions certified LPG dedicated engine over the next five (5) years. Controlling 2,968 trucks, these respondents account for **4.0%** of the surveyed truck population. An additional 1.9% of the sampled population expressed qualified interest in LPG heavy-duty trucks. The survey respondents control 11,275 trucks (0.38% of the U.S. total medium heavy-duty or larger trucks). There are ~3 million medium heavy-duty or larger trucks in the U.S.

- 5.6% of the surveyed fleet executives stated that they had no interest to buy LPG powered heavy-duty trucks.

- 87.1% of the surveyed fleet executives did not respond to the survey.

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[1] Commonly known as “propane”

[2] Selected from the National Association of Fleet Administrators (NAFA) membership list, and from the Clean Cities Coalition (CC).

[3] Responses were considered usable if the responding fleet operated appropriately sized trucks and all pertinent questions were answered.

- Of those stating that they would **not** buy LPG powered trucks, half were already committed to use another alternative fuel (i.e. LNG, CNG).

C. Conclusion

- *There is interest in a LPG powered engine for the truck industry in the 270 ± 5 HP range with a torque of 600+ ft-lbs. The five-year estimated sales forecast for such an engine is 25,700 engines. Of these, over 2,000 would be bought in its first year of commercial availability, and about 6,000 would be bought each following year.*

D. Most Important/Least Important Issues

- The most important issues,[4] in order of importance, to those who *are* interested to buy LPG powered trucks are:
  (1) Satisfy government mandates
  (2) Fuel cost
  (3) Engine performance and reliability
  (4) Operating costs other than fuel (e.g. maintenance)
  (5) Fuel availability

  The LPG industry can directly impact two (2) of these issues (#2, #5). The LPG industry cannot control issues #3 and #4.

- The most important issues,[5] in order of importance, to those who *are not* interested to buy LPG powered trucks (excluding those already committed to CNG and LNG) are:
  (1) Engine reliability
  (2) Fuel cost
  (3) Lack of infrastructure
  (4) Education and technical training
  (5) Capital and initial costs
  (6) Preference for traditional fuels

  The LPG industry can directly impact three (3) of these issues (#2, #3, #4); and can partially affect issue #5. The LPG industry cannot control issue #1.

More detailed data is found in Appendix 1.

E. Recommendations

- Conduct face-to-face presentations of this survey's findings to top executives of: (a) four major North American engine manufacturers, (b) one North American re-manufacturer, and (c) one European engine manufacturer. North American heavy-duty engine manufacturers typically respond to competition; they rarely initiate it. The six recommended presentations are to assess first hand their respective interest to develop and certify such an engine.

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[4] Replies to Question 6 (Appendix 1).
[5] Replies to Question 7 (Appendix 1).

- Once an engine manufacturer has committed to this project, the LPG industry, in conjunction with this engine manufacturer, to achieve and to hold meaningful market penetration, should pursue a program to educate the trucking industry as to:
  (A) overcome misconceptions that LPG is not readily available, and
  (B) stress LPG's cost-effectiveness versus other alternative fuels.

III. Project Management Support and Administrative Work Performed

A. Project Fundraising

Funding contracts have been completed by National Renewable Energy Laboratory (NREL), Natural Resources Canada (NRCan), Propane Education and Research Council (PERC), Railroad Commission of Texas Alternative Fuels Research and Education Division (AFRED), South Coast Air Quality Management District (SCAQMD), and Western Propane Gas Association (WPGA).

B. Travel Associated with Effort Described

May 3, 1999, ADEPT travel to Monterey, CA, for the World Truck Conference. (Gathered background information.)

IV. Appendices

1. Tabulated Results
2. List of Survey Addressees

V. Glossary of Acronyms

ADEPT	The ADEPT Group, Inc.
AFRED	Railroad Commission of Texas Alternative Fuels Research and Education Division
CC	Clean Cities Coalition
CNG	compressed natural gas
GVW	gross vehicular weight
LPG	liquefied petroleum gas (propane)
NRCan	Natural Resources Canada
NREL	National Renewable Energy Laboratory
PERC	Propane Education and Research Council
SCAQMD	South Coast Air Quality Management District
WPGA	Western Propane Gas Association

RESULTS OF NEAR-TERM DEMAND SURVEY FOR HEAVY-DUTY LPG POWERED TRUCKS

Question 1. Does your fleet include medium heavy-duty trucks (14,001-33,000 lbs GVW: weight class T6) or larger?

LOG #	RESPONDENT	STATE	RESPONSE
65	Simmons Foods Inc.	AR	YES
26	City of Little Rock	AR	YES
194	Tucson Electric Power Company	AZ	YES
71	City of Bakersfield	CA	YES
90	Harris Feeding Co.	CA	YES
94	City of Santa Rosa	CA	YES
104	City of Beverly Hills	CA	YES
210	Verdegaal Brothers Inc.	CA	YES
107	City of Anaheim	CA	YES
207	Pacific Gas & Electric	CA	YES
35A	City of Santa Monica	CA	YES
37A	County of Mariposa, DPW	CA	YES
29	City of Colorado Springs	CO	YES
226	City of Boulder	CO	YES
236	Broward County Sheriff's Office	FL	YES
56	County of DeKalb	GA	YES
75	Rollins, Inc.	GA	YES
157	County of Fulton	GA	YES
250	Columbus Consolidated Government	GA	YES
13	Boone County Public Works	MO	YES
14	City of St. Louis	MO	YES
43	FerrellGas	MO	YES
248	City of Springfield	MO	YES
180	State of Nevada	NV	YES
235	State of Oklahoma	OK	YES
47	City of El Paso	TX	YES
37	City of DeSoto	TX	YES
32	City of Dallas	TX	YES
77	Mustang Tractor & Equipment Co.	TX	YES
130	County Commissioner's Office	TX	YES
28	City of Fort Worth	TX	YES
124	HEB Grocery	TX	YES
247	City of Virginia Beach	VA	YES

Summary of Answers to Question 1

There were 33 usable responses to this survey of a sampled population of 256 fleets.

FINDING:

The response rate of 12.9% (33/256) is statistically significant.

Question 2. Given that a suitable LPG powered engine were commercially available, is your firm interested to buy over the next five (5) years trucks powered by an ultra low emissions[1] certified LPG dedicated engine?

LOG #	STATE	YES	NO
65	AR	✓	
26	AR	✓	
194	AZ	✓	
94	CA	✓	
210	CA	✓	
107	CA	✓	
37A	CA	✓	
226	CO	✓	
56	GA	✓	
157	GA	✓	
250	GA	✓	
13	MO	✓	
14	MO	✓	
43	MO	✓	
180	NV	✓	
235	OK	✓	
47	TX	✓	
37	TX	✓	
130	TX	✓	
248	MO	Uncertain	
71	CA		✓
90	CA		✓
104	CA		✓
207	CA		✓
35A	CA		✓
29	CO		✓
236	FL		✓
75	GA		✓
32	TX		✓
77	TX		✓
28	TX		✓
124	TX		✓
247	VA		✓

<u>Summary of Answers to Question 2</u>

[1] ARB and EPA certifications.

58% of the respondents expressed some interest[1] to buy trucks powered by an ultra low emissions certified LPG dedicated engine over the next five (5) years.

39% of the respondents did not express interest.

One respondent was uncertain of future interests.

FINDING:

7.4% (19/256) of the total sampled fleets expressed a qualified interest in buying LPG powered trucks (if and when available).

[1] Unless these respondents quantified their interest, they were not considered to be genuinely committed to buy LPG powered trucks.

Question 3a. How many trucks powered by an ultra low emissions certified LPG dedicated engine would you estimate your firm would buy over the next five (5) years?

LOG#	**STATE**	***NUMBER TO BE BOUGHT IN YEAR***				
		2000	**2001**	**2002**	**2003**	**2004**
14	MO	0	1	0	0	10
37	TX	1	2	1	1	1
37A	CA	3	-	-	-	-
43	MO	120	340	340	340	340
47	TX	10	10	10	10	10
56	GA	5	10	20	25	25
65	AR	1	5	5	5	5
94	CA	4	8	8	8	8
107	CA	0	5	8	6	3
130	TX	5	5	5	5	5
194	AZ	2	4	6	8	10
210	CA	1	1	1	1	1
226	CO	0	0	0	0	0
250	GA	0	8	8	8	8

Question 3b. What is the confidence level (percentage) of your answer to the previous question (assuming that such engines <u>are</u> available)?

LOG#	**STATE**	***RESPONSE***				
		81-100%	61-80%	41-60%	21-40%	0-20%
14	MO	✓				
37	TX			✓		
37A	CA					✓
43	MO	✓				
47	TX		✓			
56	GA	✓				
65	AR				✓	
94	CA	✓				
107	CA		✓			
130	TX				✓	
194	AZ		✓			
210	CA	✓				
226	CO				✓	
250	GA	✓				

Summary of Answers to Question 3

Of the sampled fleets, 5.5% (14/256) expressed a quantified interest in buying LPG powered trucks. In terms of actual trucks on the road (used as ultimate indicator of buying power),the pro-LPG engine replying fleets represent 4.0% of the trucks in the sampled population[1].

FINDINGS:

- **The heavy-duty LPG powered trucks expected to be bought (if available in their HP range) over the next five years by the respondents are:**

YEAR					TOTAL over 5 years
1st year	2nd year	3rd year	4th year	5th year	
128	*348*	*359*	*363*	*372*	*1,570*

- **The industry-wide projected heavy-duty LPG powered trucks to be bought (if available in their HP range) in the U.S. over the next five years:**

YEAR					TOTAL over 5 years
1st year	2nd year	3rd year	4th year	5th year	
9,780	*26,580*	*27,420*	*27,804*	*28,416*	*120,000*

COMMENTS:

To achieve the above market penetration, the issues identified in Questions 6 and 7 must be successfully and timely addressed.

The above projections include truck engines with a wide range of engine specifications (i.e. horsepower, torque).

[1] [The average size (212 trucks) of the fleets expressing an interest in LPG powered trucks multiplied by the number of fleets (14 fleets)] divided by [the average size (291 trucks) of all the fleets in the sampled population multiplied by the number of fleets (256 fleets)].

Question 4. What size LPG powered engine would you prefer for your fleet's need? Please select the one horsepower range that most fits your fleet's requirements.

LOG#	STATE	HORSEPOWER RANGE (HP)								
		200-224	225-250	251-275	276-300	301-325	326-350	351-375	376-400	401-425
14	MO			▮▮▮▮▮						
37	TX			▮▮▮						
37A	CA						▮			
43	MO		▮▮▮▮▮							
47	TX	▮▮▮▮								
56	GA	▮▮▮▮▮								
65	AR				▮▮					
94	CA			▮▮▮▮▮						
107	CA		▮▮▮▮							
130	TX						▮▮			
194	AZ	▮▮▮▮								
210	CA								▮▮▮▮▮	
226	CO								▮▮	
250	GA					▮▮▮▮▮				

Buy Confidence Level	Symbol
81-100%	▮▮▮▮▮
61-80%	▮▮▮▮
41-60%	▮▮▮
21-40%	▮▮
0-10%	▮

<u>Summary of Answers to Question 4</u>

21% of the respondents prefer the 200-224 HP range

21% of the respondents prefer the 251-275 HP range

<u>FINDING:</u>

It is considered preferable to focus on a 270 HP range LPG engine. An LPG certified engine in the 200-224 HP range already exists. Currently, there is no certified engine in the 270 HP range.

Question 5. For the engine that you selected in answer to Question 1 above, please indicate the torque (in ft-lb) that most likely fits your fleet's requirements.

LOG#	STATE	RESPONSE (ft-lb)	*RESPONSE TO QUESTION 4 HORSEPOWER REQUIRED (HP)*
14	MO	650	*251-275*
37	TX	No preference expressed	*251-275*
37A	CA	1200	*326-350*
43	MO	660	*225-250*
47	TX	500-700	*200-224*
56	GA	600	*200-224*
65	AR	900-1,100	*276-300*
94	CA	500	*251-275*
107	CA	800	*225-250*
130	TX	330	*326-350*
194	AZ	No preference expressed	*200-224*
210	CA	1,500	*376-400*
226	CO	No preference expressed	*376-400*
250	GA	1,150	*301-325*

Summary of Answers to Question 5

The responses did not indicate a clearly preferred torque range.

FINDINGS:

- **Although there is insufficient data for conclusive findings, there appears to be interest in an LPG engine with ~270 HP and 600+ ft-lbs. of torque.**

- **The estimated ~270 HP and 600+ ft-lbs. of torque LPG engines to be bought in the U.S. over the next five years are:**

YEAR					**TOTAL**
2000	**2001**	**2002**	**2003**	**2004**	
2,096	***5,696***	***5,876***	***5,958***	***6,089***	***25,715***

Question 6. Given that a LPG powered engine suitable to your fleet's needs is commercially available, what issues/considerations will play a major favorable role in your decision to shift all or part of your fleet to LPG dedicated trucks over the next five (5) years?

LOG#	STATE	DESCRIPTIVE RESPONSES
14	MO	• Low incremental cost and low fuel cost with a payback in 50K miles or less • NO running issues (hard starts in cold weather, rough idle, hesitation on acceleration, range) • Certified EPA LEV status or better
37	TX	• EPA regulations • Price of fuel • Maintenance on propane engines
37A	CA	• Fuel availability • Is it being forced on us as a county of only 17,000 • What manufacturers offer a proven product line
43	MO	• Fuel economy • EPACT requirements • Longer life of engine
47	TX	• Engine reliability and performance • Fueling infrastructure • Emissions compliance
56	GA	• Durable like diesel • Equal to diesel fuel economy • Less than diesel in cost
65	AR	• Operating cost • Driver acceptance • Ease/cost of maintenance
94	CA	• Availability of fuel • Requires less space & weight than CNG • Static fuel prices throughout the year
107	CA	• Cost of engine • Availability of refueling or cost of installing our own refueling sites
130	TX	• Available fueling locations in the Houston TX, Harris County area. • Trained mechanics upon repair needs • Commissioner of Harris County Precinct one final approval
194	AZ	• To meet federal regulations • Cleaner air
210	CA	• Rebates from Air Quality Control • Savings on fuel cost

		• Lower engine maintenance cost
226	CO	• Dealer support • Warranty • Performance
250	GA	• The cost of the fueling point infrastructure may prohibit changing the fleet to CNG

FINDINGS:

The five most important issues playing a favorable role in the decision to shift to LPG dedicated trucks are:

(1) Satisfy government mandates (6 replies)
(2) Fuel cost (5 replies)
(3) Engine performance and reliability (4 replies)
(4) Operating costs other than fuel (e.g. maintenance) (4 replies)
(5) Fuel availability (4 replies)

The LPG industry can directly address two of these issues (#2 and #5). The LPG industry cannot control issues #3 and #4.

Question 7. If you answered "No" to Question #2, please list the two (2) main reasons why LPG powered trucks are not likely to be considered by your firm?

LOG #	STATE	DESCRIPTIVE RESPONSES
71	CA	• Investment by City of Bakersfield in a LCNG Station. • Primary alternate fuel of natural gas is the preferred one now and in future.
104	CA	• Applications are not widespread enough to support investment. • No clear advantage to fleet operations.
207	CA	• Our strategy is to promote the use of CNG as a utility in a market and sell CNG.
35A	CA	• Currently operate a fleet of 200 CNG powered vehicles, 35 HD. Also have a CNG station on site. • Prefer CNG to LNG due to safety concerns and emission results.
29	CO	• Are committed to CNG (support Municipal LGD).
236	FL	• Questions would be raised: (A) where to refuel, (B) parts availability, (C) technical knowledge needed for repair, and (D) driver training of operation. • Purchase cost of LPG compared to diesel or gas. • Would only consider LPG if proven in the field testing results were available.
75	GA	• We have made no decision relative to alternative fuelled vehicles.
13	MO	• Very unstable fuel vapor that have the potential to create a serious fatality without warning. • We have owned such vehicles in the past and have had nothing but problems and incidents. We no longer own such. Let's research for a less deadly fuel-gasoline is bad enough.
32	TX	• Currently committed to CNG.
77	TX	• Not interested. • Expense-training.
28	TX	• They are considered but in bi-fuel not dedicated.
124	TX	• We are going to LNG and have already converted half of our Houston fleet to LNG. • LPG does not have the benefits to our operation that LNG does.
247	VA	• Substantial research and commitment toward CNG. • CNG infrastructure in place.

FINDINGS:

Out of 13 respondents, 8 already committed to another alternative fuel (i.e. CNG, LNG).

Of the firms not already committed to another alternative fuel, the six most common reasons for not considering LPG powered trucks are:

(1) Engine reliability (*4 replies)*,
(2) Fuel cost *(3 replies)*,
(3) Lack of infrastructure *(3 replies)*,
(4) Education / technical training *(2 replies)*,
(5) Capital / initial costs *(2 replies)*, and
(6) Preference for traditional fuels *(2 replies)*.

The LPG industry can directly address three (3) of these issues (#2, #3, and #4); and can partially affect issue #5. The LPG industry cannot control issue #1.

Question 8. Do you wish to receive a compilation of this survey's results?

LOG #	RESPONDENT	STATE	YES	NO
65	Simmons Foods Inc.	AR	✓	
26	City of Little Rock	AR	✓	
194	Tucson Electric Power Company	AZ	✓	
71	City of Bakersfield	CA	✓	
90	Harris Feeding Co.	CA	✓	
94	City of Santa Rosa	CA	✓	
210	Verdegaal Brothers Inc.	CA	✓	
107	City of Anaheim	CA	✓	
207	Pacific Gas & Electric	CA	✓	
35A	City of Santa Monica	CA	✓	
37A	County of Mariposa, DPW	CA	✓	
29	City of Colorado Springs	CO	✓	
236	Broward County Sheriff's Office	FL	✓	
56	County of DeKalb	GA	✓	
75	Rollins, Inc.	GA	✓	
157	County of Fulton	GA	✓	
250	Columbus Consolidated Government	GA	✓	
43	FerrellGas	MO	✓	
248	City of Springfield	MO	✓	
180	State of Nevada	NV	✓	
235	State of Oklahoma	OK	✓	
47	City of El Paso	TX	✓	
32	City of Dallas	TX	✓	
77	Mustang Tractor & Equipment Co.	TX	✓	
130	County Commissioner's Office	TX	✓	
28	City of Fort Worth	TX	✓	
104	City of Beverly Hills	CA		✓
226	City of Boulder	CO		✓
13	Boone County Public Works	MO		✓
14	City of St. Louis	MO		✓
37	City of DeSoto	TX		✓
124	HEB Grocery	TX		✓
247	City of Virginia Beach	VA		✓

FINDING:

Most respondents want to see the survey results.

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LPG Truck Survey Sending Log

LOG#	Contact/s	Phone/Fax	State
1	Mr. Gary Lauder, Fleet Administrator M.S. # 2D52/61 Northrop Grumman #1 Northrop Avenue Hawthorne, CA 90250	Phn: (310) 332-4972 Fax: (310) 331-4130	CA
2	Mr. Larry Medearis Clean Cities Coordinator Portland International Airport 7000 Northeast Airport Way Portland, OR 97208	Phn: (503) 460-4080 Fax: (503) 460-4124	OR
3	Ms. Valerie Phillips, Coordinator Austin Clean Cities 2512 S. I35, Suite 335 Austin, TX 78704	Phn: (512) 442-8051 Fax: (512) 442-7810 phillips@cleanairforce.com	TX
4	Ms. Lynn Hayes North Central Texas Council of Government P.O. Box 5888 Arlington, TX 76005-5888	Phn: (817) 695-9281 Fax: (817) 640-3028	TX
5	Mr. Bill Morris Clean Cities Coordinator City of Corpus Christi 4225 South Port Corpus Christi, TX 78415-5311	Phn: (361) 885-6925 Fax: (361) 853-3200	TX
6	Mr. Carlon Bennett, C/O Veronica Coordinator Paso Del Norte Clean Cities Coalition 1100 North Stanton, Suite 805 El Paso, TX 79902	Phn: (915) 543-9922 Fax: (915) 543-5625	TX
7	Mr. Joe S. Aguilar Manager-Fleet Operations Southwestern Bell Telephone Co. 7159 San Pedro, B6 San Antonio, TX 78216-6244	Phn: (210) 351-8292 Fax: (210) 351-8280	TX
8	Mr. Pat Albertelli Vehicle Insurance Administrator American Protective Services P.O. Box 6757 Oakland, CA 94603-0757	Phn: (510) 568-0276 Ext. 400 Fax: (510) 430-9297	CA
9	Ms. Wanda J. Alexander Fleet Manager	Phn: (818) 553-0735 Fax: (818) 551-1448	CA

	Pacific Bell, Room 101 208 W. Harvard St. Glendale, CA 91204-1315		
10	Mr. Albert L. Allen Equipment Services Superintendent City of LaPorte P.O. Box 1115 LaPorte, TX 77572-1115	Phn: (281) 471-8903 Fax: (281) 471-0578	TX
11	Mr. Russel L. Allen Equipment Shop Supervisor City of Corona 306 S. Vicentia Ave. Corona, CA 91720-2158	Phn: (909) 736-2306 Fax: (909) 279-3508	CA
12	Mr. Amo Amerson Manager-Fleet Operations California State Auto Assn. 100 Van Ness Ave. San Francisco, CA 94102-5279	Phn: (415) 565-4152 Fax: (415) 241-8683	CA
13	Mr. Ray Samuel Amick II Shop Supt./Safety Coordinator Boone County Public Works 5551 Hwy. 63 South Columbia, MO 65201-9711	Phn: (573) 449-8515 Fax: (573) 875-1602	MO
14	Mr. Christopher D. CAFM Amos Commissioner of Equip. Services City of St. Louis Equipment Services Division 1900 Hampton Avenue St. Louis, MO 63139-2902	Phn: (314) 768-2898 Fax: (314) 768-2899	MO
15	Mr. Larry Anstee Support Services Supervisor Palm Beach County Fleet Management Building D 3700 Belvedere Road West Palm Beach, FL 33406	Phn: (561) 233-4576 Fax: (561) 233-4575	FL
16	Mr. Edward C. Antignolo Fleet Services Transcontinental Gas Pipeline Corp. P.O. Box 1396 Houston, TX 77251-1396	Phn: (713) 215-2479 Fax: (713) 215-4212	TX

17	Mr. Raymond W. Archer Director City of Key West Department of Transportation P.O. Box 1078 Key West, FL 33041-1078	Phn: (305) 292-8247 Fax: (305) 292-8285	FL
18	Ms. Jonder J. Arida Purchasing/Fleet Manager Paragon Cable P.O. Box 460849 San Antonio, TX 78246-0849	Phn: (210) 352-4513 Fax: (210) 342-6845	TX
19	Mr. David W. Armstrong Fleet Maintenance Manager City of St. Louis Equipment Services Division 1900 Hampton Avenue St. Louis, MO 63139-2902	Phn: (314) 768-2898 Fax: (314) 768-2899	MO
20	Mr. Everett W. Armstrong Fleet Administrator GTECH Corporation 8200 Cameron Road Building E-120 Austin, TX 78754	Phn: (512) 908-4200 Ext. 4206 Fax: (512) 339-1482	TX
21	Mr. James R. Armstrong Sourcing Specialist Mobil Business Resources Corp. 3225 Gallows Road Fairfax, VA 22037-0001	Phn: (703) 846-4266 Fax: (703) 846-4474	VA
22	Mr. James R. Ashe Shop Superintendent County of DeKalb Fleet Maintenance Dept. 772 Camp Drive Decatur, GA 30032-1302	Phn: (404) 297-3975 Fax: (404) 297-3832	GA
23	Ms. Anne MacCracken Maricopa Association of Governments 302 North First Avenue Suite 300 Phoenix, AZ 85003	Phn: (602) 254-6300 Fax: (602) 254-6490	AZ
24	Mr. Chris Ferrara East Bay Clean Cities 1030 Detroit Ave. Concord, CA 94518-2487	Phn: (925) 674-6533 Fax: (925) 674-6533 caf3@pge.com	CA
25	Mr. John Villenueve, Transit Planner Council of Fresno County Governments 2223 G Street	Phn: (559) 498-4036 Fax: (559) 488-1065	CA

	Fresno, CA 93706		
26	Mr. Bill Dewitt City of Little Rock 3314 J.E. Davis Drive Little Rock, AR 72209-5535	Phn: (501) 918-4200 Fax: (501) 918-4223	AR
27	Ms. Dinah Ault Supervisor Administrative Services Swedish Match No. America Inc. 6600 W. Broad St. Richmond, VA 23230-1702	Phn: (804) 287-3225 Fax: (804) 287-3279	VA
28	Mr. Mike Zobel Superintendent Equipment Services Division City of Fort Worth 4100 Columbus Trail Fort Worth, TX 76133-7578	Phn: (817) 871-5100 Fax: (817) 871-5119	TX
29	Mr. Lawrence W. Baggett CAFM Fleet Director City of Colorado Springs Mail Code #1220 P.O. Box 1575 Colorado Springs, CO 80901-1575	Phn: (719) 578-6936 Fax: (719) 578-6722	CO
30	Ms. Julie L. Baier Manager-Administrative Services PrimeCo Personal Communications, Inc. 6 Campus Circle Westlake, TX 76262-8220	Phn: (817) 258-1401 Fax: (817) 258-1536	TX
31	Mr. George Baker Fleet Administrator VES City of Tyler P.O. Box 2039 Tyler, TX 75710-2039	Phn: (903) 531-1321 Fax: (903) 531-1331	TX
32	Mr. Terry R. Baldwin Assistant Fleet Manager City of Dallas ECI Services 3112 Canton Street Suite 1 Dallas, TX 75226-1687	Phn: (214) 670-4461 Fax: (214) 670-5452	TX
33	Mr. Gary R. Bartlett Sgt.- Administrative Services Division City of Winter Springs Police Department 1126 State Road 434 East Winter Springs, FL 32708-2798	Phn: (407) 327-1000 Ext. 348 Fax: (407) 327-6652	FL
34	Mr. Larry Batten Vehicle Coordinator Jacksonville Electric Auth.	Phn: (904) 632-6136 Fax: (904) 632-7095	FL

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178	Mr. Olin D. Cooper Material and Equipment Manager City of Newport News Department of Public Utilities 420 60th Street Newport News, VA 23607	Phn: (757) 247-2685 Fax: (757) 247-8750	VA
179	Mr. Gerald G. Coppler Area Manager-Fleet Operations Southwestern Bell Telephone Co. Room 2010.01 One Bell Plaza Dallas, TX 75202	Phn: (214) 464-5849 Fax: (214) 464-1774	TX
180	Mr. Ronald R. Corbett Fleet Manager State of Nevada Department of Transportation P.O. Box 170 Las Vegas, NV 89125	Phn: (702) 385-6500 Fax: (702) 385-6577	NV
181	Mr. Lou Cordero Fleet Manager County of Merced Department of Public Works 2222 M Street Merced, CA 95340	Phn: (209) 385-7460 Fax: (209) 722-2691	CA
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194	Mr. Jed A. Dahar Director Fleet Maintenance and Fabrication Tucson Electric Power Company Transportation-TR101 4354 E. Irvington Road Tucson, AZ 85714-2158	Phn: (520) 745-3513 Fax: (520) 571-4135	AZ
195	Ms. Victoria Dahlquist Senior Buyer The Walt Disney Company Mail Code 7276 500 South Buena Vista St. Burbank, CA 91521-7276	Phn: (818) 972-5164 Fax: (818) 557-7693	CA
196	Mr. Al Daniel Sheriff's Fleet Supervisor County of San Bernardino Sheriff's Department 655 East 3rd Street San Bernardino, CA 92415-0061	Phn: (909) 387-3770 Fax: (909) 387-3766	CA
197	Mr. Gene W. Darling Fleet Manager State of Alaska Department of Transportation 2200 E. 42nd Ave. Anchorage, AK 99508-5202	Phn: (907) 269-0787 Fax: (907) 269-0801	AK
198	Mr. Roger W. Davenport Specialist-Fleet Operations ALLTEL Corporation/ALLTEL Communications P.O. Box 2177 Little Rock, AR 72203-2177	Phn: (501) 905-8229 Fax: (501) 905-8926	AR
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203	Mr. Gary Del Valle Vehicle Maintenance Supervisor County of Bexar Sheriff's Office 200 N. Comal San Antonio, TX 78207-3536	Phn: (210) 270-6221 Fax: (210) 270-6181	TX
204	Ms. Louise Delmage Facilities Manager Argonaut Insurance Company 250 Middlefield Road Menlo Park, CA 94025-3500	Phn: (650) 858-6608 Fax: (650) 858-6631	CA
205	Mr. John R. DeLoache CAFM Director of Transportation Northern Virginia Electric Corp. P.O. Box 2710 Manassas, VA 22108-0875	Phn: (703) 754-6743 Fax: (703) 7540-6777	VA
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225	Mr. Terry Doubek Senior Buyer	Phn: (713) 755-6838 Fax: (713) 755-6695	TX

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226	Mr. Bill Douglas City of Boulder Fleet Services 5064 Pearl Street Boulder, CO 80301-2436	Phn: (303) 413-7139 Fax: (303) 413-7157	CO
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231	Mr. Joe Duffy Fleet Logistics Coordinator Omni Services Inc. 14115 Lovers Lane Culpeper, VA 22701-4172	Phn: (540) 829-4707 Fax: (540) 829-4761	VA
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240	Mr. Tracy E. Egeness Corporate Services Analyst Siemens Business Communications Systems, Inc. M/S 1230 4900 Old Ironsides Drive Santa Clara, CA 95054-1830	Phn: (408) 492-3392 Fax: (408) 492-3163	CA
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254	Ms. Lynn O. Fee Operations Administrator Eveready Battery Company, Inc. 1 Checkerboard Square St. Louis, MO 63164-0001	Phn: (314) 982-2901 Fax: (314) 982-4078	MO
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