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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<sup>1</sup> (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).<sup>2</sup> 33 usable<sup>3</sup> 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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<sup>1</sup> Commonly known as "propane"

<sup>2</sup> Selected from the National Association of Fleet Administrators (NAFA) membership list, and from the Clean Cities Coalition (CC).

<sup>3</sup> 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,<sup>4</sup> 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,<sup>5</sup> 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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<sup>4</sup> Replies to Question 6 (Appendix 1).

<sup>5</sup> 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?**

<b>LOG #</b>	<b>RESPONDENT</b>	<b>STATE</b>	<b>RESPONSE</b>
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<sup>1</sup> 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		✓

**Summary of Answers to Question 2**

<sup>1</sup> ARB and EPA certifications.

*58% of the respondents expressed some interest<sup>1</sup> 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).**

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<sup>1</sup> 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 are 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<sup>1</sup>.*

**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
1 <sup>st</sup> year	2 <sup>nd</sup> year	3 <sup>rd</sup> year	4 <sup>th</sup> year	5 <sup>th</sup> 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
1 <sup>st</sup> year	2 <sup>nd</sup> year	3 <sup>rd</sup> year	4 <sup>th</sup> year	5 <sup>th</sup> 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).

<sup>1</sup> [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%	

**Summary of Answers to Question 4**

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

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

**FINDING:**

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	<ul style="list-style-type: none"> <li>• Low incremental cost and low fuel cost with a payback in 50K miles or less</li> <li>• NO running issues (hard starts in cold weather, rough idle, hesitation on acceleration, range)</li> <li>• Certified EPA LEV status or better</li> </ul>
37	TX	<ul style="list-style-type: none"> <li>• EPA regulations</li> <li>• Price of fuel</li> <li>• Maintenance on propane engines</li> </ul>
37A	CA	<ul style="list-style-type: none"> <li>• Fuel availability</li> <li>• Is it being forced on us as a county of only 17,000</li> <li>• What manufacturers offer a proven product line</li> </ul>
43	MO	<ul style="list-style-type: none"> <li>• Fuel economy</li> <li>• EPACT requirements</li> <li>• Longer life of engine</li> </ul>
47	TX	<ul style="list-style-type: none"> <li>• Engine reliability and performance</li> <li>• Fueling infrastructure</li> <li>• Emissions compliance</li> </ul>
56	GA	<ul style="list-style-type: none"> <li>• Durable like diesel</li> <li>• Equal to diesel fuel economy</li> <li>• Less than diesel in cost</li> </ul>
65	AR	<ul style="list-style-type: none"> <li>• Operating cost</li> <li>• Driver acceptance</li> <li>• Ease/cost of maintenance</li> </ul>
94	CA	<ul style="list-style-type: none"> <li>• Availability of fuel</li> <li>• Requires less space &amp; weight than CNG</li> <li>• Static fuel prices throughout the year</li> </ul>
107	CA	<ul style="list-style-type: none"> <li>• Cost of engine</li> <li>• Availability of refueling or cost of installing our own refueling sites</li> </ul>
130	TX	<ul style="list-style-type: none"> <li>• Available fueling locations in the Houston TX, Harris County area.</li> <li>• Trained mechanics upon repair needs</li> <li>• Commissioner of Harris County Precinct one final approval</li> </ul>
194	AZ	<ul style="list-style-type: none"> <li>• To meet federal regulations</li> <li>• Cleaner air</li> </ul>
210	CA	<ul style="list-style-type: none"> <li>• Rebates from Air Quality Control</li> <li>• Savings on fuel cost</li> </ul>

		<ul style="list-style-type: none"><li>• Lower engine maintenance cost</li></ul>
226	CO	<ul style="list-style-type: none"><li>• Dealer support</li><li>• Warranty</li><li>• Performance</li></ul>
250	GA	<ul style="list-style-type: none"><li>• The cost of the fueling point infrastructure may prohibit changing the fleet to CNG</li></ul>

**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	<ul style="list-style-type: none"> <li>Investment by City of Bakersfield in a LCNG Station.</li> <li>Primary alternate fuel of natural gas is the preferred one now and in future.</li> </ul>
104	CA	<ul style="list-style-type: none"> <li>Applications are not widespread enough to support investment.</li> <li>No clear advantage to fleet operations.</li> </ul>
207	CA	<ul style="list-style-type: none"> <li>Our strategy is to promote the use of CNG as a utility in a market and sell CNG.</li> </ul>
35A	CA	<ul style="list-style-type: none"> <li>Currently operate a fleet of 200 CNG powered vehicles, 35 HD. Also have a CNG station on site.</li> <li>Prefer CNG to LNG due to safety concerns and emission results.</li> </ul>
29	CO	<ul style="list-style-type: none"> <li>Are committed to CNG (support Municipal LGD).</li> </ul>
236	FL	<ul style="list-style-type: none"> <li>Questions would be raised: (A) where to refuel, (B) parts availability, (C) technical knowledge needed for repair, and (D) driver training of operation.</li> <li>Purchase cost of LPG compared to diesel or gas.</li> <li>Would only consider LPG if proven in the field testing results were available.</li> </ul>
75	GA	<ul style="list-style-type: none"> <li>We have made no decision relative to alternative fuelled vehicles.</li> </ul>
13	MO	<ul style="list-style-type: none"> <li>Very unstable fuel vapor that have the potential to create a serious fatality without warning.</li> <li>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.</li> </ul>
32	TX	<ul style="list-style-type: none"> <li>Currently committed to CNG.</li> </ul>
77	TX	<ul style="list-style-type: none"> <li>Not interested.</li> <li>Expense-training.</li> </ul>
28	TX	<ul style="list-style-type: none"> <li>They are considered but in bi-fuel not dedicated.</li> </ul>
124	TX	<ul style="list-style-type: none"> <li>We are going to LNG and have already converted half of our Houston fleet to LNG.</li> <li>LPG does not have the benefits to our operation that LNG does.</li> </ul>
247	VA	<ul style="list-style-type: none"> <li>Substantial research and commitment toward CNG.</li> <li>CNG infrastructure in place.</li> </ul>

**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**

<b>LOG#</b>	<b>Contact/s</b>	<b>Phone/Fax</b>	<b>State</b>
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
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164	Mr. Ronny D. Choate Director of General Services City of Hobbs 300 N. Turner Street Hobbs, NM 88240-8302	Phn: (505) 397-9236 Fax: (505) 397-9227	NM
165	Mr. Tayro A. Christianio Manager Admin. and Facilities Sprint North Supply Company 600 New Century Parkway New Century, KS 66031-8000	Phn: (913) 791-6839 Fax: (913) 791-7091	KS
166	Ms. Janis Christensen CAFM 12221 Martha Ann Drive	Phn: (562) 598-0908 Fax: (562) 596-5920	CA

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167	Mr. Jack E. Clancy Director Adams County Fleet Management & Support Svc. 4955 E. 74 <sup>th</sup> Avenue Commerce City, CO 80022	Phn: (303) 853-7051 Fax: (303) 853-7060	CO
168	Ms. Sandra L. Cobb Fleet Administrator Wal-Mart Stores Inc. 702 SW 8 <sup>th</sup> Street Bentonville, AR 72716-8076	Phn: (501) 273-4659 Fax: (501) 277-1983	AR
169	Mr. Thurlo Cobb Manager, Fleet Administration City of Little Rock 3314 J.E. Davis Drive Little Rock, AR 72209-5568	Phn: (501) 918-4204 Fax: (501) 918-4223	AR
170	Mr. Thomas R. Cochran, Jr. Logistics Manager State of Arizona Department of Public Safety P.O. Box 6638 Phoenix, AZ 85005-6638	Phn: (602) 223-2349 Fax: (602) 223-2529	AZ
171	Mr. William M. Colavita Fleet Administrator Commonwealth of Virginia Department of Transportation 1401 E. Broad Street Richmond, VA 23219-2000	Phn: (804) 367-6886 Fax: (804) 367-8987	VA
172	Mr. Bruce E. Collingsworth Equipment Coordinator City of Fort Worth Police Department Fiscal & Equipment Management/Executive Services 350 W. Belnap Street Fort Worth, TX 76102-2072	Phn: (817) 877-8060 Fax: (817) 877-8270	TX
173	Mr. Cecil S. Collins, Jr. Vehicle Services, Manager Medical College of Georgia HT-1143, Vehicle Services Augusta, GA 30912-7505	Phn: (706) 721-4667 Fax: (706) 721-1255	GA
174	Mr. David E. Collins Garage Superintendent City of Vero Beach 3405 Airport West Drive	Phn: (561) 978-5360 Fax: (561) 978-5306	FL

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176	Mr. William M. Conner C.P.M. Director of Purchasing McJunkin Corp. P.O. Box 513 Charleston, WV 25322-0513	Phn: (304) 348-5288 Fax: (304) 348-4922	WV
177	Mr. Mark O. Coon Superintendent City of Mesa Fleet Support Services P.O. Box 1466 Mesa, AZ 85211	Phn: (602) 644-2540 Fax: (602) 644-2832	AZ
178	Mr. Olin D. Cooper Material and Equipment Manager City of Newport News Department of Public Utilities 420 60 <sup>th</sup> 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
182	Ms. Sharon A. Cozort Corporate Fleet Administrator Emerson Electric Co.	Phn: (314) 553-1555 Fax: (314) 553-1939	MO

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183	Ms. Sue A. Christenson Fleet Administrator Camco International Inc. P.O. Box 14484 Houston, TX 77221-4484	Phn: (713) 749-5700 Fax: (713) 715-2102	TX
184	Mr. Rod K. Cramer Fleet Supervisor Black & Veatch 11401 Lamar Ave. Overland Park, KS 66211	Phn: (913) 458-9456 Fax: (913) 458-2934	KS
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188	Ms. Marti Croft Assistant V.P., Corporate Services Republic Underwriters Ins. Co. 2727 Turtle Creek Blvd. Dallas, TX 75219-4897	Phn: (214) 559-1264 Fax: (214) 526-2104	TX
189	Mr. Ralph V. Crouch Acquisition Superintendent City of Long Beach 2801 E. Willow Street Long Beach, CA 90806-2374	Phn: (562) 570-5453 Fax: (562) 570-5459	CA
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193	Mr. Don Cundiff Vehicle Fleet Management Supervisor Phillips Petroleum Company 353 Adams Blvd. Bartlesville, OK 74004	Phn: (918) 661-6066 Fax: (918) 662-2869	OK
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 3 <sup>rd</sup> 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. 42 <sup>nd</sup> 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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213	Mr. Bill DeWitt Fleet Operations Manager City of Little Rock 3314 J.E. Davis Drive Little Rock, AR 72209-5568	Phn: (501) 918-4208 Fax: (501) 918-4223	AR
214	Ms. Camille M. Dial Finance Coordinator Hoechst Marion Roussel K1-M0710 P.O. Box 9627 Kansas City, MO 64134-0627	Phn: (816) 966-4395 Fax: (816) 966-3843	MO
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216	Mr. Douglas W. Dix Property & Finance Officer Commonwealth of Virginia Department of State Police P.O. Box 27472 Richmond, VA 23261-7472	Phn: (804) 674-2116 Fax: (804) 674-2214	VA

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220	Ms. Peggy Doherty Manager-Fleet Operations Southwestern Bell Telephone Co. Room 10-E-97 1010 Pine Street St. Louis, MO 63101-2015	Phn: (314) 235-5873 Fax: (314) 331-9730	MO
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223	Ms. Rhonda D. Donovan Vice President – Administration Acosta Sales Co., Inc. P.O. Box 19309 Jacksonville, FL 32245-9309	Phn: (904) 281-9800 Fax: (904) 281-9966	FL
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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
227	Mr. Tim S. Doyle Superintendent/Equipment Services City of North Richland Hills 7200A Dick Fisher Drive South North Richland Hills, TX 76180-5066	Phn: (817) 581-5672 Fax: (817) 656-7569	TX
228	Mr. Jay Drescher Corporate Fleet Manager Texas Industries Inc. 1341 W. Mockingbird Lane Dallas, TX 75247-6913	Phn: (972) 647-6779 Fax: (972) 647-3776	TX
229	Mr. Nick Dristas Traffic Manager Smith International/M.I. Drilling P.O. Box 60068 Houston, TX 77205-0068	Phn: (281) 233-5628 Fax: (281) 233-5991	TX
230	Mr. Mark Duddy, Jr. Fleet Services Supervisor Southern California Gas Co. 1919 S. State College Blvd. Anaheim, CA 92806-6114	Phn: (714) 634-3147 Fax: (714) 634-3079	CA
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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235	Mr. Steve Dwyer	Phn: (405) 521-2206	OK

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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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