The 2017 HHP Summit, held in Jacksonville, Florida, in partnership with the JAX Chamber, brought together natural gas and high horsepower stakeholders from across the globe for a week of cutting-edge programming, peer-to-peer learning, a large and dynamic expo hall floor, off-site tours, innovative workshops, and numerous project and product debuts and announcements.

The enthusiasm, commitment, and optimism for the development of the natural gas market was clear. Driven by pioneering fleet operators and infrastructure developers like our 2017 tour hosts—TOTE, JAX LNG, Crowley Maritime, Eagle LNG, and Florida East Coast Rail— incredible innovation and growth continues across all corners of North America. This exciting progress is made possible due to the leadership and fortitude from the fuel, equipment, and engine suppliers making significant investments to build the market. Attendees learned about the transformative growth that has swept the market, and gained firsthand insight into the most innovative natural gas marine, rail, mining, and power gen projects in North America and beyond.
Caterpillar showcased details on the company’s new dynamic gas blending retrofit kit for the Cat 785D and 793D mining trucks which will allow engines to run on both diesel and LNG.

Hy-Lok USA showcased their array of tube fittings and valves for critical customer applications, which have been rigorously tested and conform to the latest international standards and specifications.

Karl Dungs Combustion Controls showcased their high-pressure and low-pressure fuel supply gas trains which have global approvals.

Cimarron Companies debuted their trailer truck with 18 high-pressure tanks. Notably, the trailer type of tube has passed all DOT tests without exception, including the vacuum test.

Acme Cryogenics displayed their high-performance vacuum insulated piping for all liquidated natural gas applications.

Dixon Valve & Coupling Company displayed their cryogenic dry disconnects and breakaway couplings for fuel delivery systems including marine bunker, liquefied gas applications, LNG piping, and gas piping.

LightSail Energy debuts their LightOn 13-foot gas transportation trailer which is in the highest capacity modules within the 8,000 lb. GVW class.

FIBA Technologies displayed their Hydrogen (H2/CNG) Type IV Composite Pressure Tank, an ultra-lightweight fuel gas transportation, available from 4 to 25 feet long.

Caterpillar displayed their LNG PERMA-CYL, a high-pressure, high-flow for liquefied natural gas. The portable, easily installed tank can be filled by the Delta Microbulk LNG Delivery System, allowing short-fill times with no gas losses under prescribed conditions.

Carnival spotlighted the newly signed contract with Shell to supply full power to their dual-fuel powered cruise ships, launching in North America in 2020 and 2022.

Quantum Fuel Systems, which has the highest capacity propane trailers in the industry, displayed a section of their Virtual Pipeline Trailer for LNG transport, as well as four back-of-cab LNG fuel systems for class-8 trucks.

Shell shared that a long-term charter agreement had been finalized with Harvey Gulf International Marine to operate an LNG tanker built by GTW Energy Transport.

NuBlu Energy displayed a 1:8 to 1 scale model of the recently completed natural gas liquefaction plant in Port Allen, Louisiana.

GT North America highlighted the project partners involved in the development of the first ever LNG bunker barge in North America, with a display of a cross-section of the vessel and the innovative containment systems.

Dresser-Rand displayed their LNG® Micro-Scale Modular Natural Gas Liquefaction Plant, which is representative of the ones the company has installed in Pennsylvania, New Jersey and Canada.

CMA CGM gave attendees hands-on access to its InteliBifuel MOBILE and InteliBifuel DENOX, which are control solutions for dual-fuel high horsepower engines.

CIMC ENRIC highlighted the project partners involved in the development of the first ever LNG bunker barge in North America, with a display of a cross-section of the vessel and the innovative containment systems.

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Parker Hannifin displayed a full array of natural gas fuel system solutions for the HHP market, including fuel storage, valves, shut-off valves, fuel regulators, connections and hoses, and more.

Chert Industries showcased their LNG PERMA-CTL HP high-pressure, high-flow for liquefied natural gas. The portable, easily installed tank can be filled by the Delta Microbulk LNG Delivery System, allowing short-fill times with no gas losses under prescribed conditions.

As a long-time attendee at HHP Summit, this is one of the most worthwhile events in my entire year. You get to meet with every facet of the supply chain here and meet with so many different companies to create the solutions you need.”

–Matthew Jackson, Vice President LNG Business Development, Crowley Maritime

CMA CGM
HHP Summit 2017 By the Numbers

Throughout the four-day Summit, HHP Summit attendees learned about LNG and CNG projects that are hitting the water, tracks, and gravel month after month. Details on the sessions, tours, and featured speakers are included on the following pages.

**Agenda Overview**

**CONFERENCE WELCOME:** Pete Tumminello, Group President of Commercial Businesses

In the opening address for the conference, Pete Tumminello provided insight into the development progress for his organization’s exciting joint venture project, JAX LNG, which will bring reliable liquefied natural gas supply to Florida. JAX LNG is constructing North America’s first small-scale coastal LNG facility, located at Dames Point near Jacksonville, Florida, to service the marine, rail, drilling, mining, trucking, power generation, commercial, and industrial markets.

**Representing 25 Countries Around the Globe:**

HHP Summit convened attendees from every continent except Antarctica!

Australia  
Canada  
Chile  
China  
Colombia  
Czech Republic  
Denmark  
Dominican Republic  
Finland  
France  
Germany  
Italy  
Japan  
Spain  
Sweden  
Switzerland  
United Kingdom  
USA  
Russian Federation  
South Africa  
South Korea  

"HHP Summit is such a great venue to bring people together that are collaborating across industries and across regions. It’s the one time per year that we can come together and see our colleagues, competitors, suppliers, and customers in one place, allowing us to really make sure we’re bringing the best product to market in the most effective way possible.”

– Tim Hermann, President, Storage and Fuels, Southern Company Gas
KEYNOTE ADDRESS:

Thomas Crowley Jr, Chief Executive Officer & Chairman

As the board chairman and CEO of Crowley Maritime, Tom Crowley stopped by the HHP Summit this year to confirm his company’s investments and continued forward commitment to LNG as the right fuel for the company’s operations. He summarized the company’s investment in two RoRo ships that will call upon Jacksonville and Miami/Everglades, the company’s recent acquisition and growth strategy for distributing LNG to island communities, and how LNG will be considered for all new ships built in the future. Mr. Crowley stated that LNG—abundantly available throughout North America—is the best fuel option for marine operations, as it mitigates price volatility and significantly reduces vessel emissions. With the International Maritime Organization (IMO) 0.5% sulfur regulation being implemented in 2020, he heralded leaders such as CMA-CGM which announced their order of nine extra-large LNG container ships (the largest in the world) the prior day.

AFTERNOON ADDRESS:

Martin Tallet, President

Martin Tallet spoke about the disruptive impacts the 2020 International Maritime Organization (IMO) low sulfur fuel requirements for marine fuels will have on the broader fuels market in both marine and land-based applications. With a requirement for marine vessels to use fuel with no more than 0.5% sulfur beginning on January 1, 2020, the marine sector will soon be a significant new consumer of refined product – whereas this market is currently using unrefined residual fuel oil to power its ships. The marine sector’s new demand for refined product will compete with existing land-side consumers of diesel fuel (i.e. rail, truck, aviation, power generation, etc.). Given a host of interconnected issues related to the mix of crude supply, refining capacity limitations, and others, Martin’s extensive expertise and his company’s expert modeling and analysis predicts market disruptions (i.e. price increases and/or supply limitations) will result in 2020. With 18-month horizons, the futures market does not yet see the price impact of such disruptions, but Martin predicts major trade impacts as we get closer to the 2020 IMO implementation date. Of course, the IMO low sulfur fuel requirements have driven significant initial investment in LNG powered marine vessels, as evidenced throughout the week at the HHP Summit. Going forward, the IMO rule will present major challenges to refiners and fuel suppliers and thus provide strong impetus for all HHP sector participants to invest in LNG and LNG as a risk mitigation strategy based upon the low and stable cost of natural gas.
Off-Site Tours: HHP Summit Attendees Gained Firsthand Insight Into Innovative Natural Gas Marine, Rail, Trucking & Infrastructure Projects

Tuesday, November 7 | 9:00 a.m. – 12:00 noon
JAX LNG Plant and TOTE LNG Terminal Tour
Sponsored by JAX LNG

This “tour of many firsts” showcased the pioneering work of TOTE and Pivotal LNG, two of the earliest market movers in the North American LNG marine market. Attendees got a comprehensive look at the entire LNG fuel supply chain, starting with the JAX LNG production facility, a newly constructed small-scale coastal LNG facility which is the first in North America and a joint venture between Pivotal LNG and NorthStar Midstream. This facility will load North America’s first LNG bunkering barge, which will then maneuver to TOTE’s berth to provide LNG bunkering services to its two first-in-the-world LNG-powered container ships.

The tour continued at Jacksonville Transit Authority’s public access LNG station—designed, built and maintained by Clean Energy—which provides fuel for the Authority’s own fleet of natural gas buses; a fleet projected to increase to 1,000 vehicles over the next three years. Once fully-deployed, the transit fleet is forecasted to consume approximately 1 million DGEs of CNG annually which represents a greenhouse gas reduction of approximately 2,318 metric tons.

Tuesday, November 7 | 1:00 p.m. – 4:00 p.m
UPS LNG and Jacksonville Transit Authority CNG Station Tour
Sponsored by GP Strategies

Attendees gained behind-the-scenes access to tours of two high-volume natural gas fueling stations. The tour began with an inside look at UPS’s LNG fueling facility, one of the largest in the world, which supports a 125+ truck operation. The facility sits onsite at the company’s Jacksonville ground package hub, which is undergoing a massive expansion to increase its throughput capacity and incorporate advanced technology and operations automation.

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Tuesday, November 7 | 2:30 p.m. – 5:00 p.m
Eagle LNG Maxville Plant and Crowley LNG Bunker Terminal Tour
Sponsored by Eagle LNG Services

Crowley’s innovative on-dock LNG storage and bunkering operation was front and center of this tour. The two 1,000 cubic meter LNG storage tanks manufactured by Chart Ferox in the Czech Republic are each 170-feet long (exceeding the width of an American football field) and were truly a sight to see up close. These tanks hold more than 500,000 liters of LNG, which is stored on site and delivered to Crowley’s LNG-powered ConRo ships via a cutting-edge pumping and bunkering system. Fuel for this storage and bunkering facility will be provided by the nearby Maxville LNG production plant, a brand new state-of-the-art facility which includes a high-efficiency nitrogen-cycle Cosmodyne liquefier and a 1,000,000 gallon cryogenic tank provided by Matrix Service being constructed by Eagle LNG. The LNG plant and on-dock bunkering installation gave tour attendees a comprehensive look at the entire supply chain for modern LNG-powered vessel operations and other high horsepower customer segments.

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Tuesday, November 9 | 12:45 p.m.– 4:00 p.m
Florida East Coast Railway LNG Operations Tour
Hosted by Florida East Coast Railway

In November 2014, Florida East Coast Railway (FECR) initiated the deployment of 24 new LNG-powered locomotives. These 4400 HP Tier 3 emissions compliant locomotives now make up FECR’s entire mainline thru-haul fleet operating between Jacksonville and Miami. With the conversion project just recently completed, attendees received the first-ever tour of LNG operations at FECR’s Bowden Yard in Jacksonville. Attendees gained hands-on access to an LNG-powered locomotive and tender car, and a first-of-its-kind LNG fueling station for railcars, built by Clean Energy. FECR also displayed an ISO container used to transport the gas, and one of the LNG-powered Raven Transport trucks that hauls LNG tanker delivery trailers.

“HHP Summit has been a great experience. Our colleagues that work with us on our LNG project are well represented here. It’s been valuable for our entire team.”
– Fran Chinicci, Senior Vice President & Chief Operating Officer, Florida East Coast Railway
A diverse panel of stakeholders discussed the forward opportunities and growth of the natural gas HHP market. Panelists discussed their outlook for growth in the marine, rail, and power generation segments, as well as the movement of natural gas by rail car.

A core theme shared by each panelist was the need for collaboration—at the project level, national level, and global level—in order to continue to mature and grow these various end-use markets. A major key to wide-scale project deployment was having consistent rules and regulations in every market each company does business in, as well as a set of credible data that operators could reference when making investment decisions.

A Sea Change for Marine Fuels

This exciting panel gathered the true pioneers of LNG marine projects from around the globe, with executives from BC Ferries, TOTE, UECO, Carnival and Harvey Gulf all represented. The panelists discussed unique infrastructure, bunkering, and safety considerations that each organization faced, as they move passengers and cargo using a diverse range of vessels—from ferries, to container ships, cruise ships, and supply vessels. Attendees also learned about the details of brand new partnership announcements that took place during HHP Summit, including the finalization of a long-term charter agreement between Shell and Harvey Gulf International Marine to operate an LNG bunker barge built by Q-LNG Transport. Carnival also announced that it had selected Shell to supply fuel to power its two LNG-powered cruise ships, launching in North America in 2020 and 2022. The momentum taking place in the LNG marine market is incredible!

Building the Foundation for Today’s HHP Natural Gas Market

Leading fuel suppliers shared their perspective on the continued growth of the natural gas powered HHP market. Each panelist discussed how they entered the market and how both marine and landside projects have played an important role in allowing them to make significant investments in LNG production and improved supply chains—infrastructure that is now serving as the foundation for market growth.

It was noted that as this supply has increasingly come on line, customers have become increasingly confident in the ability to switch their operations to LNG; however, a comprehensive engagement and educational effort is still required to assist end users in making this conversion. Pivotal LNG noted that collaboration, training for first responders, and education of both customers and the public about the safety and reliability of LNG were key elements of this process. Fortis BC commented on how the industry is asking customers to make operational changes by moving to LNG, and emphasized the need for “change management,” in order for there to be continued success.

The panel acknowledged the dip in the price of oil in recent years, but all confirmed that they have continued to grow their businesses. It was even noted by Eagle LNG that the volatility of oil prices, including the unprecedented price drop in 2014, turned out to be good for the natural gas market, forcing discipline in the market, and a focus on quality and delivering successful projects for customers. All agreed their LNG business is expanding and are proud of their diligence to ensure high standards of safety and operations.

Leveraging Personnel Training, Safety & Stakeholder Engagement for Project Success

Representatives from the US Coast Guard, regional fire departments, and other industry stakeholders joined us at the Florida State College Fire Academy to hear from pioneers like FECR and BC Ferries on how they leveraged internal and external training and stakeholder engagement to drive project success, and for live demonstrations on the physical properties of LNG and safety handling procedures.

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While LNG has often taken center-stage at the annual HHP Summit – especially this year in Jacksonville with three LNG plants being constructed and extensive LNG end-user activity in the marine, rail and power generation segments – North American growth within the compressed natural gas (CNG) fueled HHP market has been substantial. In the U.S. and Canada, there is over 200,000 MCF of installed CNG compression capacity to serve downstream HHP market segments. If converted to LNG, this translates to more than 2.5 million gallons of daily LNG production.

**CNG Project & Technology Highlights**

Parker Hannifin displayed a full array of CNG and LNG fuel solutions for the HHP market, including fuel metering valves, shut-off valves, fuel regulators, connections and hoses, and more.

Quantum Fuel Systems, which has the highest capacity gaseous trailers in the industry, displayed a section of their Virtual Pipeline Trailer for CNG transport, as well as their back-of-cab CNG fuel system for class-8 trucks.

Pentagon Energy, a provider of CNG energy solutions, displayed a 53-foot CNG mobile transportation trailer with eight Type IV carbon fiber cylinders that each have a 7,000 liter capacity.

CNG has proven to be an extremely cost-effective and operationally reliable diesel displacement strategy in multiple HHP segments. Throughout the Summit, exhibitors and speakers demonstrated the incredible advancements in technology, logistics, and supply chain options that are helping drive market progress and deliver environmental and cost savings benefits to end-users.
HHP Summit is organized by Gladstein, Neandross & Associates (GNA), a leading US-based consulting firm specializing in market development for alternative fuels, vehicles, and equipment. For more than 20 years, GNA has been actively involved in the development of the markets we serve via both its consulting practice and its conference production experience. GNA has produced many of the nation’s leading clean and advanced technology events that have brought together tens of thousands of attendees. Prior events include the national Faster Freight – Cleaner Air conference series, the Advanced Clean Transportation (ACT) Expo, the Low Carbon Fuels Expo, the National Biomethane Summit, the Rethink Methane Summit, the NGV Fleet Summit, and more. GNA has teamed up with leaders throughout the North American natural gas industry to create and produce this summit as a forum for discussions on this critical topic. www.gladstein.org