

Maximizing Our 'Feet on the Street'

Partnering With Allies to Target Low Hanging Fruit

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NGVAMERICA

Natural Gas Vehicles for America



Market Opportunities Abound!

- Q: How do we maximize our ability to capitalize on them?
- A: Leverage our market presence by aligning with trade allies and clean-air/clean-transportation advocates
 - Local Gas Distribution Companies
 - Clean Cities Coordinators, AQ/Environmental/Health advocates
 - OEM sales/marketing staffs and their dealer networks



Market Opportunities Abound!

More OEM Product Than Ever Before

- American Honda Civic GX
“Cleanest production vehicle on earth”
- While manufacturing quantities are limited, production is being increased for MY2009
- Fed tax credit eliminates most of premium; state credits often wipe out remaining premium



Market Opportunities Abound!

More OEM Product Than Ever Before

- CWI 8.9L ISL-G engines in the leading refuse chassis suppliers
 - Peterbilt LCF 320
 - Crane Carrier LET line
 - Autocar Xpeditor
 - American LaFrance Condor
 - Mack TerraPro expected to announce soon!



Market Opportunities Abound!

More OEM Product Than Ever Before

- CWI 5.9L B Gas Plus and 8.9L ISL-G engines in the top sweeper models
 - Elgin
 - Schwarze
 - Tymco
 - Allianz



Market Opportunities Abound!

More OEM Product Than Ever Before

- Buses with CWI 5.9L B Gas Plus and 8.9L ISL-G engines are offered by the leading transit bus suppliers

- Orion
- New Flyer
- NABI
- Blue Bird
- El Dorado
- Optima
- Freightliner CCC



Market Opportunities Abound!

More OEM Product Than Ever Before



- School buses with CWI 8.9L ISL-G engines are factory built by 2 of top 3 manufacturers

- » Blue Bird All American RE
- » Thomas Built Saf-T-Liner HDX



Market Opportunities Abound!

More OEM Product Than Ever Before

- CWI 5.9L B Gas Plus is factory available from Freightliner Custom Chassis Corp. in their MT 45 and MT 55 walk-in van chasses and MB55 bus chassis



Market Opportunities Abound!

More OEM Product Than Ever Before

- CWI 8.9L ISL-G equipped factory-built unit currently available from Sterling Trucks in their L Series Setback 113 tandem-axle tractor



Sterling management has indicated that they will have several “straight truck versions” of L Series in early 2009



Market Opportunities Abound!

More OEM Product Than Ever Before



- Westport Innovations ISX-G equipped T800 now available from Kenworth and additional field trials are underway in several Peterbilt trucks in Wal Mart fleet
- Most of 2008 production allocated to LA/LB ports program but Westport is looking to expand sales to other niche applications and geographic areas



Market Opportunities Abound!

More SVM Retrofit Systems Than Ever Before

Sedans

- Ford 4.6L Crown Victoria, Lincoln Town Car and Mercury Grand Marquis (BAF)
- Pending but soon to be “officially” announced:
 - GM 3.5L Impala (Natural Drive)
 - Ford 2.1L Focus (TransEco)
 - Others?



?



Market Opportunities Abound!

More SVM Retrofit Systems Than Ever Before

Commercial work trucks and vans

- Chevy G1500/2500/3500 Series vans with 6.0L engine (Baytech, IMPCO)
- Chevy G4500 cab+chassis with 6.0L
- Chevy C/K1500/2500/3500 series pickups with 6.0L engine (Baytech, IMPCO)
- Ford F150/250/350 (BAF, FuelTek)
- Ford E350 series vans with 5.4L (BAF)



Market Opportunities Abound!

More SVM Retrofit and Repower Systems Than Ever Before

Medium- and Heavy-duty work trucks

- Chevy W3500/W4500 and Isuzu NPR and NPR HD COE with 6.0L engine (Baytech)
- Chevy C6500/7500/8500 Topkick work trucks with 8.1L engine (Baytech)
- International DT466/MaxxForceDT-equipped 4000 or 8100 series work trucks repowered with S.I.N.G. 7.6L NG engine (ESI)



Market Opportunities Abound!

More SVM Retrofit and Repower Systems Than Ever Before

Shuttle bus/trolley platform retrofits

Ex: StarTrans, Goshen, Krystal, Champion, Glaval, Starcraft, Supreme

- Chevy G3500 Series cutaways with 6.0L
- Chevy G4500 series cutaway with 6.0L
- Ford E450 series cutaways with 6.8L
- Chevy C4500/5500 cutaways with 8.1L
- Int'l 3200/3300 series repowered with Phoenix 7.6L spark-ignited engine)
- Freightliner Custom Chassis MB55



“More Feet on the Street”

Partnering with Allies

- Local Gas Companies
 - Customer relationship exists; additional opportunity to offer “value” by facilitating code/permits issues, introducing ES&S contacts to assist with specs, forwarding to CCCs to pursue grants and other assistance
 - Cross-reference service lines against NGV prospect database
- Activities
 - Quarterly mailing/e-blast of NGVAmerica-supplied news, niche profiles, payback analyses (pre-packaged, requires little LDC manpower)
 - Co-host CVEF NGV workshop and/or a grant-writing workshop
 - Possibly co-matching funds or in-kind services to facilitate grant scores



“More Feet on the Street”

Partnering with Allies

- Clean Cities Coordinators
 - Mission and goals are compatible with ours
 - For those that are not sales oriented, inclusion in outreach builds their sales/marketing skill sets and confidence for better follow through
 - CCCs are familiar with available grants, application timing and processes, local MPO's and state office staff
- Activities
 - Provide “ready to mail” informational pieces and/or links to resources
 - Support CCC-CVEF NGV Workshops through table-top sponsorships
 - Include CCCs in tradeshow activities, coordinate invitations to prospects



“More Feet on the Street”

Partnering with Allies

- OEMs and their dealers
 - OEMs have established customer relationships and know their fleets' purchase patterns, turnover rates and have mutual interest in selling value
 - Unfortunately, many OEMs' sales staffs are not familiar with NGV benefits and program implementation tips; dealers are even less so
- Activities:
 - Conduct joint sales calls on national/regional accounts, co-sponsor mini-workshop luncheons, present dealer-oriented webinars, create “NGV” component of their newsletters to customers
 - NGVAmerica to pursue speaking slots at OEMs' national dealer meetings and we encourage ES&S members' sponsorship of these events



Low-Hanging Fruit Examples



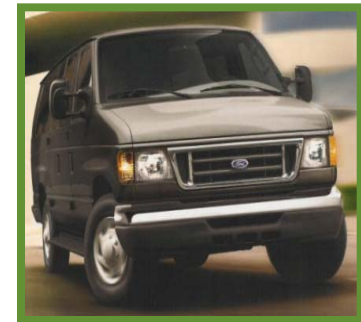
Medical Lab Courier Service

- GVWR: <8500 lbs.
 - Honda Civic GX
- MPG: 24/36 City/Hwy, 30K miles/year
- Fuel Use: 4-5 GGE/day; 1050-1300GGE/yr
- CNG Premium: \$5,500
(before fed tax credit)
- Fed Tax Credit: \$ 4000 (<8500 #)
- Simple Payback: .75 – 1years
(based on \$ 1.50/GGE savings at retail station: \$ 2.35/GGE (\$ 3.85 gas))
- Life-cycle cost advantage: \$6300 – \$8000!
(based on 5yr life)



Passenger Van for Limo/Door-to-Door Service

- GVWR: >8500 lbs.
 - Ford E-350 passenger van
 - Chevy/GMC 3500 passenger van
- MPG: 10/13 City/Hwy, 50K miles/year
- Fuel Use: 12-15 GGE/day; 4100-4500gge/yr
- CNG Premium: \$15,500
(before fed tax credit)
- Fed Tax Credit: \$ 8000 (> 8500 # , < 14000 #)
- Simple Payback: 1.1– 1.3years
(based on \$ 1.50/GGE savings at retail station: \$ 2.35/gge (\$ 3.85 gas)
- Life-cycle cost advantage: \$16K – 20K!
(based on 4yr life)



Walk-in Van

- Sample Applications
(Package Svc, Commercial Bakery/Snack Food, Linen/Uniform Services)
- GVWR ->26,000lbs.
 - FCCC MT 55 chassis w CWI 5.9L B Gas Plus
- MPG: 5.0 – 6.5, 90mpd x6 days/wk, 26-28K/yr
- Fuel Use: 13-19GGE/day; 4200-5500GGE/yr
- CNG Premium: \$42,000 (before fed tax credit)
- Fed Tax Credit: \$32,000
- Simple Payback: 1.2 - 1.6 years
(based on 1.50 savings/GGE at retail station: \$ 2.35 (\$3.85 gas))
- Simple Payback: .9 - 1.2 years
(based on \$ 1.95 savings/GGE at O&O station: \$ 1.90 (3.85 gas))
- Life-cycle cost savings: \$ 72-80+K !!! (based on 10 yr life)



Refuse Truck



- GVWR: >26,000 lbs.
 - Crane Carrier LET, Autocar Xpeditor, Peterbilt LCF 320, ALF-Condor , Sterling L Series, (all with ISL-G engine)
- MPG: 2.5 – 3.0 (lots of idle and PTO time)
- Fuel Use: 35-40gge/day; 8500-10,000dge/yr
- CNG Premium: \$50,000 (before fed tax credit)
- Fed Tax Credit: \$32,000
- Simple Payback: 1.2 – 1.4 years
(based on \$ 1.50 savings /DGE at retail: \$ 2.60 (\$4.10 diesel)
- Life-cycle cost savings: \$ 90+K!!! (based on 8-year life)

Just a 3.3-3.9 year payback EVEN IF NO TAX CREDIT DISCOUNT is available from dealer



Enlist Allies and Target The Low-Hanging Fruit!

Why go it alone when there are others with mutual goals and the resources and incentives to help us achieve our mission?





Capture the Momentum.

NATIONAL NGV CONFERENCE-SUMMIT

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