



***Clean Energy***<sup>®</sup>

*North America's leader in clean transportation*

# NGV Industry Update

Blue Skyways On-Road Subcommittee

June 24, 2008

# Company Overview

- Largest provider of vehicular natural gas (CNG & LNG) in North America
  - Design, build & operate NG stations
- Full service
  - Vehicle & Station Grants (Over \$100 Million)
  - Financing
  - Station Build & Operate
  - Fuel Production & Transportation
  - Fuel and Fleet Marketing
- Industry Leading Statistics
  - 170+ fueling stations across North America
  - Over 14,000 customer vehicles fueled daily
- Publicly-traded as **CLNE on NASDAQ**
  - 75+ million gallons in 2007



# Markets – Natural Gas Fuel of Choice

## *Airports*

- We are at 18 majors
- Emissions mitigations with expansion

## *Seaports/Regional Trucking*

- Port of LA/LB
  - 5,000-10,000 LNG Trucks
- Model for other ports

## *Refuse*

- 2,000+ trucks operating
- Tremendous Growth Opportunity

## *Transit*

- 1 out of 5 buses purchased today is NG
- Significant Emission Reductions

## *International Expansion*

- Accelerating growth
- Peru

# National Fleet Vehicles

## Transit

- Albuquerque ABO Ride
- Boston MBTA
- Dallas DART
- Foothill Transit
- Long Island Bus
- Omnitrans, San Bernardino, CA
- Phoenix RPTA
- Phoenix Transit
- San Diego MTS & NCTD
- Santa Clarita Transit
- Sun Metro
- Santa Monica Big Blue Bus
- Tempe Transit

## Airports

- Dallas-Fort Worth (DFW)
- Love Field
- Denver (DIA)
- John Wayne
- La Guardia
- Los Angeles World Airports
- Phoenix Sky Harbor
- San Diego Lindberg
- San Francisco
- Sea-Tac



## Trucking and Logistics

- Griley Trucking
- Harris Ranch
- HEB
- Sysco
- TTSI
- USPS
- UPS

## Taxis

- AAA, Allstate & Discount (PHX)
- Beverly Hills Cab
- California Yellow Cab
- LA Taxi
- North Orange County Yellow Cab
- STITA (WA)
- Yellow Cab of Long Beach
- San Francisco Yellow Cab
- SuperShuttle

## Refuse

- Amador Valley Industries
- Brothers Waste (NY)
- Burrtec Waste
- CR&R
- LA County Sanitation District
- Norcal Waste
- Palm Springs Disposal
- Solano Garbage
- Republic Services
- Waste Management



Consume Large Amounts of Fuel



Compelled to Reduce Emissions



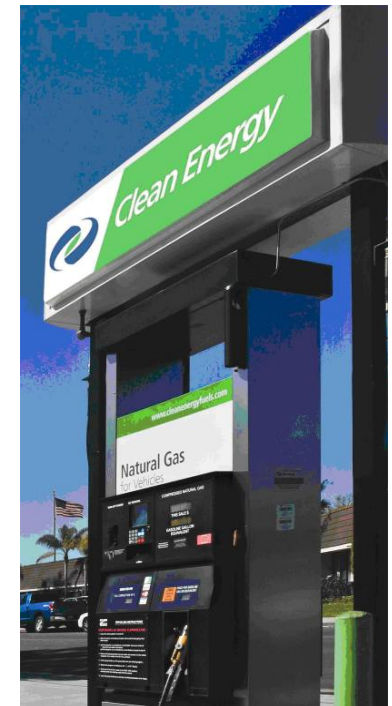
Refuel at Centralized Locations



Focused on Cost Savings

# Why Alternative Fuels?

- Record High Oil Prices are Significantly Impacting Operating Budgets
  - \$138.00/barrel
  - Diesel prices above \$5.00 per gallon
- Energy Independence
  - Foreign oil dependency (72% imported)
  - World consumes > 2 barrels for each new barrel added
- Climate Change
  - Need to identify low carbon transportation fuels
- Air Pollution
  - Numerous regions out of attainment with federal and state air quality standards



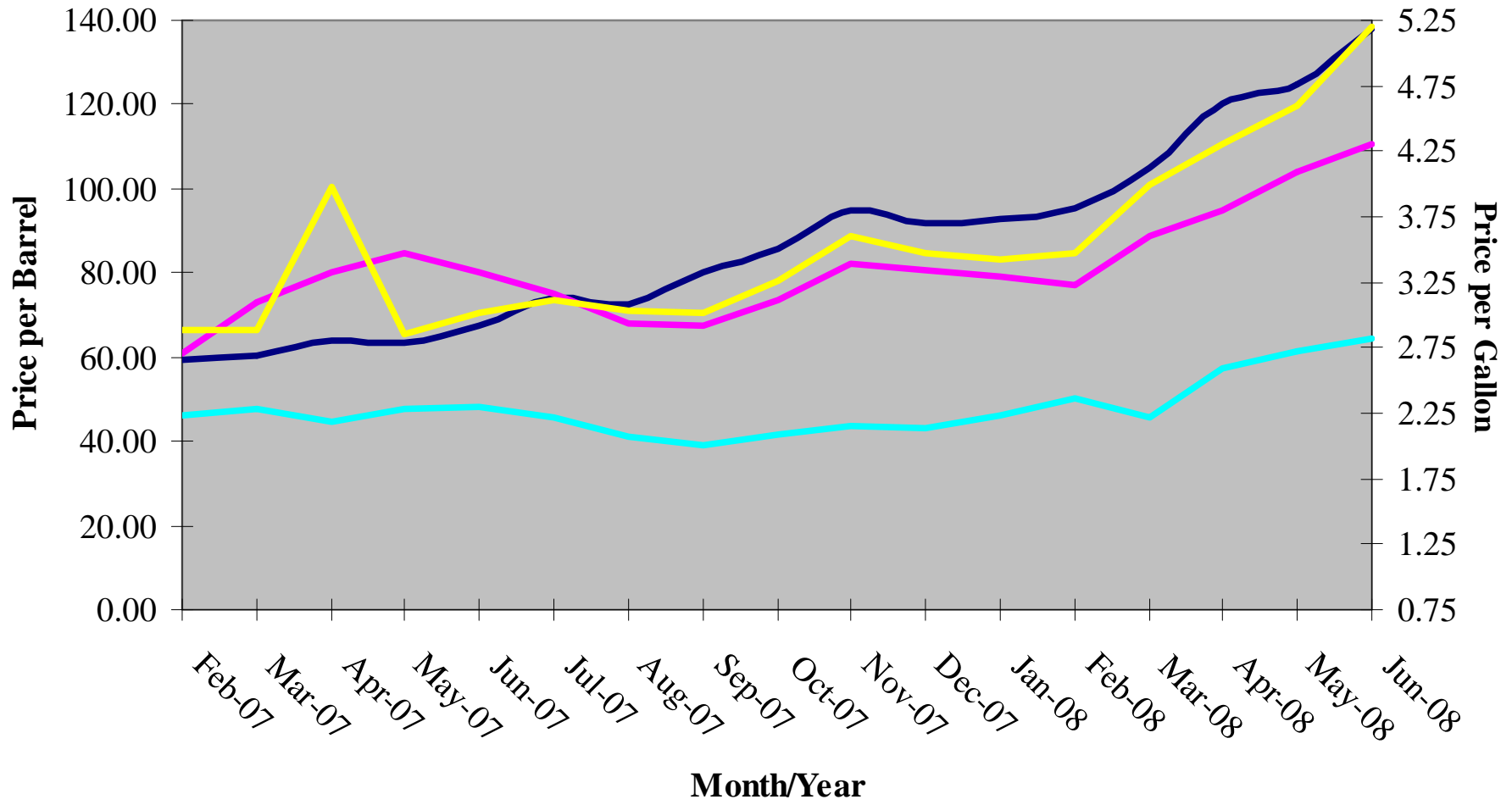
# Why Natural Gas?

## *Cheaper, Cleaner and Domestic*

- Economics
  - Fuel is significantly less expensive
    - **Over \$1.00 per gallon in savings**
  - Grants: Local, State and Federal can cover the incremental vehicle cost
- Environment
  - 50% lower NO<sub>x</sub>, 90% lower CO & 60% lower PM than diesel engines,  
**23% reduction in greenhouse gases (GHG)**
    - Reduces carbon footprint
- Domestically Produced
  - Over 97% of Natural Gas is produced in North America
    - 1:1 displacement of foreign oil



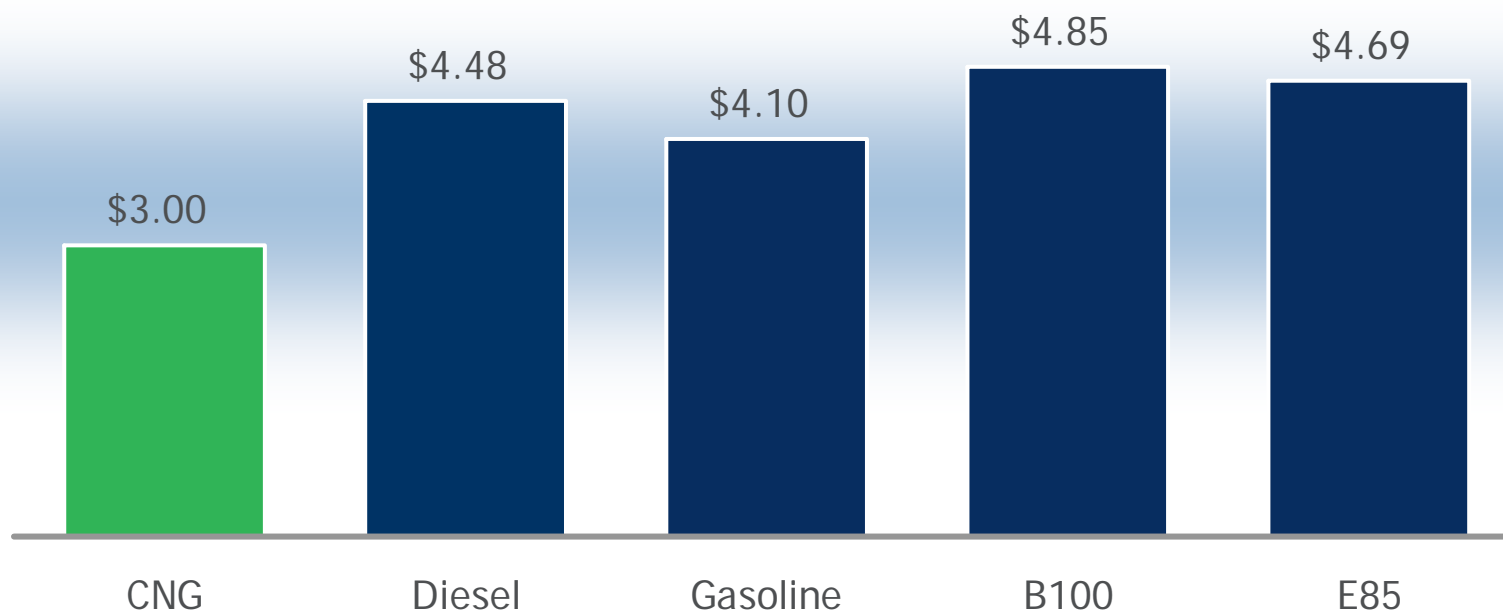
# Natural Gas Fuel Savings (Historical View)



— Crude Oil — Gasoline — Diesel — Natural Gas

## Natural Gas – The Cheaper Alternative

Pump Prices (On Equivalent Basis) For May 27, 2008<sup>1</sup>  
(GGEs)



Note:

<sup>1</sup> Price from retail station in San Diego.

# Texas Gas for Texas Fleets



# Texas NGV Fleets



DALLAS/FORT WORTH  
INTERNATIONAL AIRPORT



City of Dallas



Here Everything's Better.™



# NATURAL GAS Refuse and Airport Fleets in Texas



- City of San Antonio Refuse Trucks
  - Built Largest CNG Refuse Station in Texas
  - 30 Refuse trucks
  - 260,000 Gal/year
- City of Dallas
  - 1200 vehicles that use CNG
    - 9 fueling stations around Dallas
- DFW Airport
  - 2MM gallons/year
  - Shuttles and Buses
- Love Field Airport
  - Third party (public access) station



# DFW International Airport and Love Field CNG Stations



# NATURAL GAS Transit Fleets

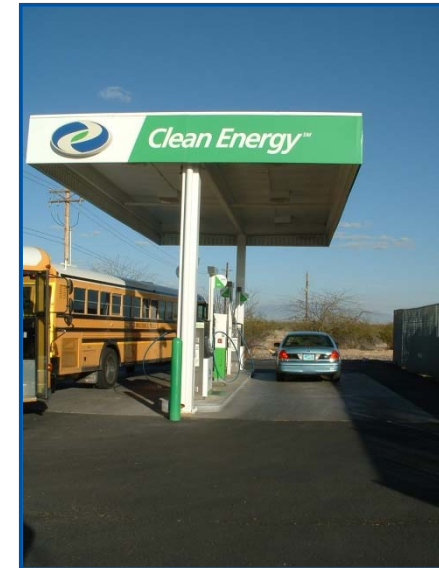


- DART (Dallas)
  - 182 LNG Buses
  - 2 LNG Fueling Stations
  - Fuel source is the Pickens Plant, Willis, Texas
- Fort Worth T
  - 200+ CNG Buses
- Other Texas NG Transit Opportunities
  - Capital Metro Transit (Austin)
  - Houston Metro Transit



## Airports

- Phoenix Sky Harbor
  - 3 public access fueling stations (Eastside, Westside and Rental Car Center)
    - 10,000 gallons per day dispensed
    - 180 taxis, 60 shuttle vans, 100 buses
- Tucson International
  - 1 public access fueling station
    - 1,000 gallons per day dispensed
    - 50 school buses, taxis, shuttle vans



## Transit

- 600+ LNG Transit Buses and 80+ CNG Transit Buses
  - Phoenix, Tempe, Mesa/RPTA
  - CE provides over 11 million gallons of LNG per year
  - Five Fueling Stations



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