

CaFCP Update for AB118 Investment Plan

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CaFCP Action Plan



46 Stations

Santa Monica, Irvine, Torrance, Newport Beach, San Francisco, Sacramento

3 Focus Areas

Passenger vehicles
Transit buses
Regulations, Codes & Standards

4 Years

Funding 2009-2012
Stations begin operation 2009-2014

\$180 Million

Industry and government investment

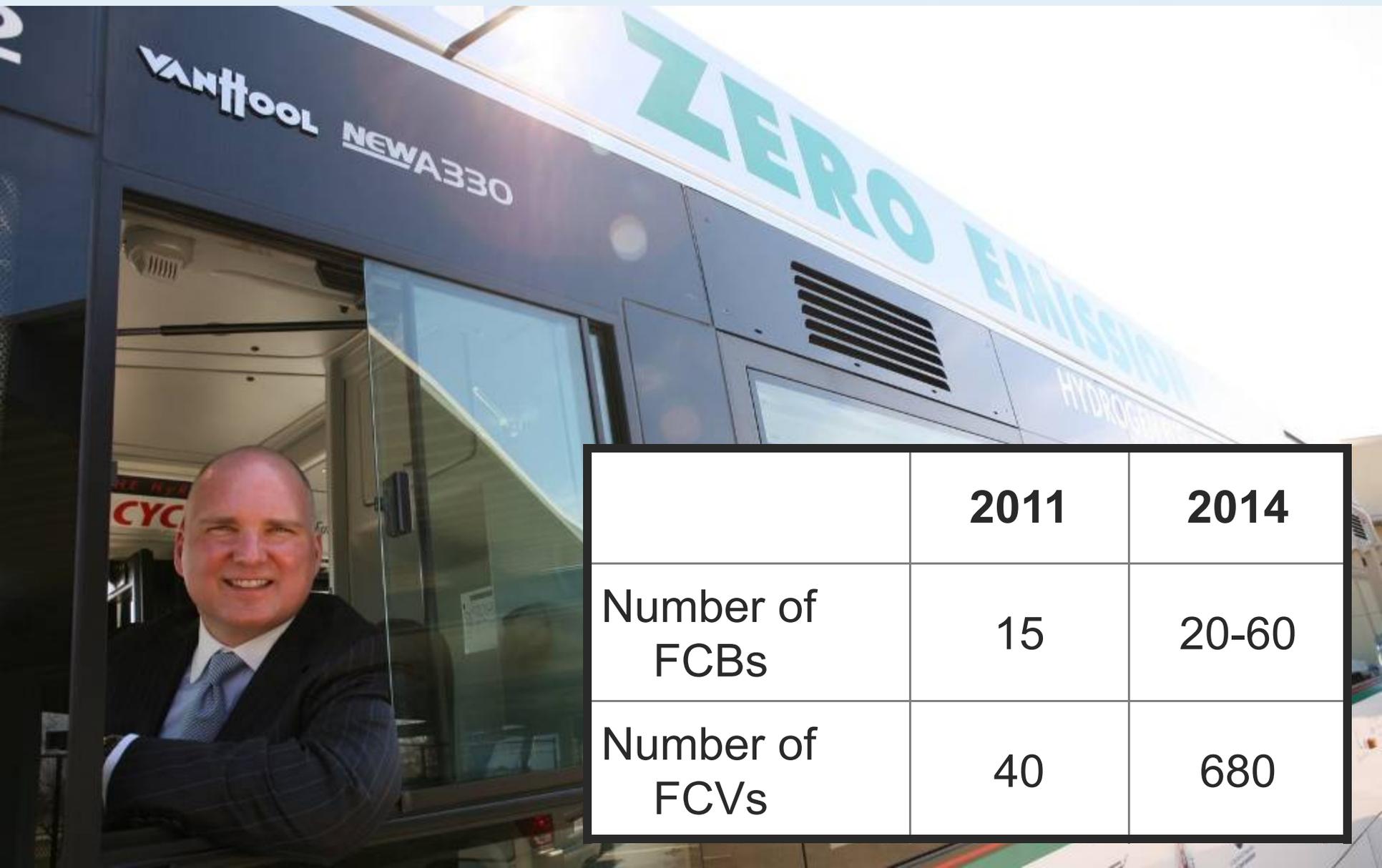
Light Duty FCV Rollout



| | 2009 | 2010 | 2011 | 2012-14 | 2015-17 |
|--------------|-------------|-------------|-------------|----------------|----------------|
| Northern CA | 57 | 56 | 68 | 865 | 8,450 |
| Southern CA | 136 | 314 | 644 | 3,442 | 41,150 |
| Total | 193 | 370 | 712 | 4,307 | 49,600 |

Summary of automaker survey responses

Transit Strategy



| | 2011 | 2014 |
|----------------|-------------|-------------|
| Number of FCBs | 15 | 20-60 |
| Number of FCVs | 40 | 680 |

Regulations, Codes & Standards



Progress to Date—FCVs



| | 2009 | 2010 | 2011 |
|-------------------------------|----------|------|------|
| Light Duty FCVs – Action Plan | 193 | 370 | 712 |
| Light Duty FCVs – Actual | 163 | - | - |
| FCBs – Action Plan | up to 15 | | |
| FCBs – Actual | 12 | | |

As of June 2009

Progress to Date—Stations



Progress to Date—Regs

- ▶ SAE standards in ballot
- ▶ CHAP process for local action plans in review
- ▶ Collaborating with DMS
- ▶ Station builders' workshop
- ▶ Mobile application for real-time station status under development

Hydrogen Supply and Demand



| Year | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|------------------------|----------|------------|------------|--------------|----------------|----------------|
| Demand | 193 | 370 | 712 | 1,210* | 2,350* | 4,305 |
| Existing Supply | 197 | 185 | 155 | 30 | 30 | 30 |
| Recently Funded Supply | 0 | 680 | 680 | 680 | 680 | 0 |
| Supply Balance | 4 | 495 | 123 | (500) | (1,640) | (4,275) |

2012 and 2013 numbers extrapolated from 2012 and 2014 numbers

Are We Ready?

- ▶ Light duty FCV market on track
 - Moving from R&D to early commercial
- ▶ Large energy and small fueling companies are active
- ▶ Government providing positive market signals and necessary early market support
- ▶ New players are coming to US and CA market
- ▶ Other FC applications showing success
- ▶ Industry has developed and committed itself collectively in a comprehensive Action Plan

YES – we are ready!

Questions or Comments?

