



TIAX NGV Market Assessment

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President

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Petroleum Displacement with Natural Gas

	Station Throughput in Millions of Therms				
	2001	2002	2003	2004	2005
SoCalGas Total	43.53	55.32	58.75	65.72	71.10
SDG&E Total	5.46	7.00	8.19	8.54	9.57
<u>Sempra Total</u>	48.99	62.32	66.94	74.26	80.67
<u>PG&E Total</u>	10.84	13.11	14.99	18.89	19.84
Total Calif Utilities	59.83	75.43	81.93	93.15	100.51
Percent Growth		26.1%	8.6%	13.7%	7.9%



California NGV Stations

	Station Count for Calif. Utilities				
	2001	2002	2003	2004	2005
SoCalGas	149	160	179	193	207
SDG&E	24	30	33	33	33
Sempra Energy Total	173	190	212	226	240
PG&E Total	94	122	118	142	143
Calif. Utilities Total	267	312	330	368	383
Percent Growth of Stations		16.9%	5.8%	11.5%	4.1%



LNG in California

- ◆ 36.5 million gallons per year now consumed in Calif.
- ◆ Represents 24% NGV fuel in Calif.
- ◆ Nearly 10X growth in last 5 years