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## NGV Market Developments in North America

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# About Agility Fuel Systems

## Leading provider of CNG and LNG fuel systems for commercial heavy-duty vehicles

- Origins dating back to 1996
- Highly engineered solutions
- 5 production facilities across the U.S. and Canada
- Leading aftermarket service expertise
- Partnership with Cummins
- Customers and end-users include OEMs and leading private fleets

Medium / heavy duty trucks



Refuse trucks



Transit and coach buses



Stationary / mobile fueling



# Overview

- Market size and characteristics
- Vehicle availability
- Fuel prices
- Fueling availability
- Key trends

# Market size and characteristics

NA NGV Unit Sales (thousands)



- LD OEM & modifiers
- MD all modifiers
- HD OEM & modifiers
- HD penetration 2-3%
- **~90% CNG/10% LNG**
  
- Significant but nascent interest in marine, rail, mining

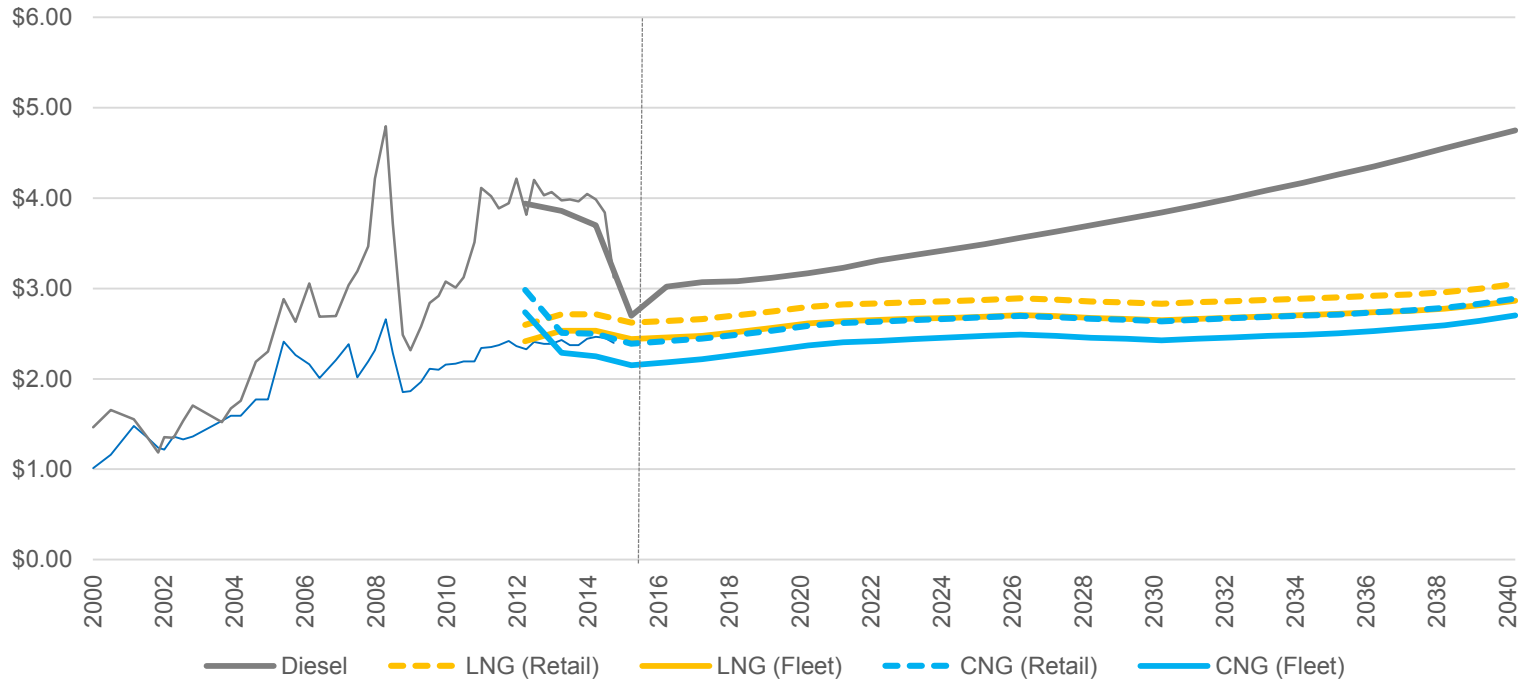
Source: NGVAmerica

# Vehicle availability

- Class 7-8: CWI 8.9L and 11.9L
  - Increasingly OEM
  - Very little dual fuel, HPDI
- Class 3-6: various bi-fuel and dedicated conversions, CWI 6.7L in 2016, FLCC
- Class 1-2b: Honda Civic GX, some bi-fuel OEM, SVM conversion kits
- Current gap: 13-15L; 7-9L



# Fuel prices

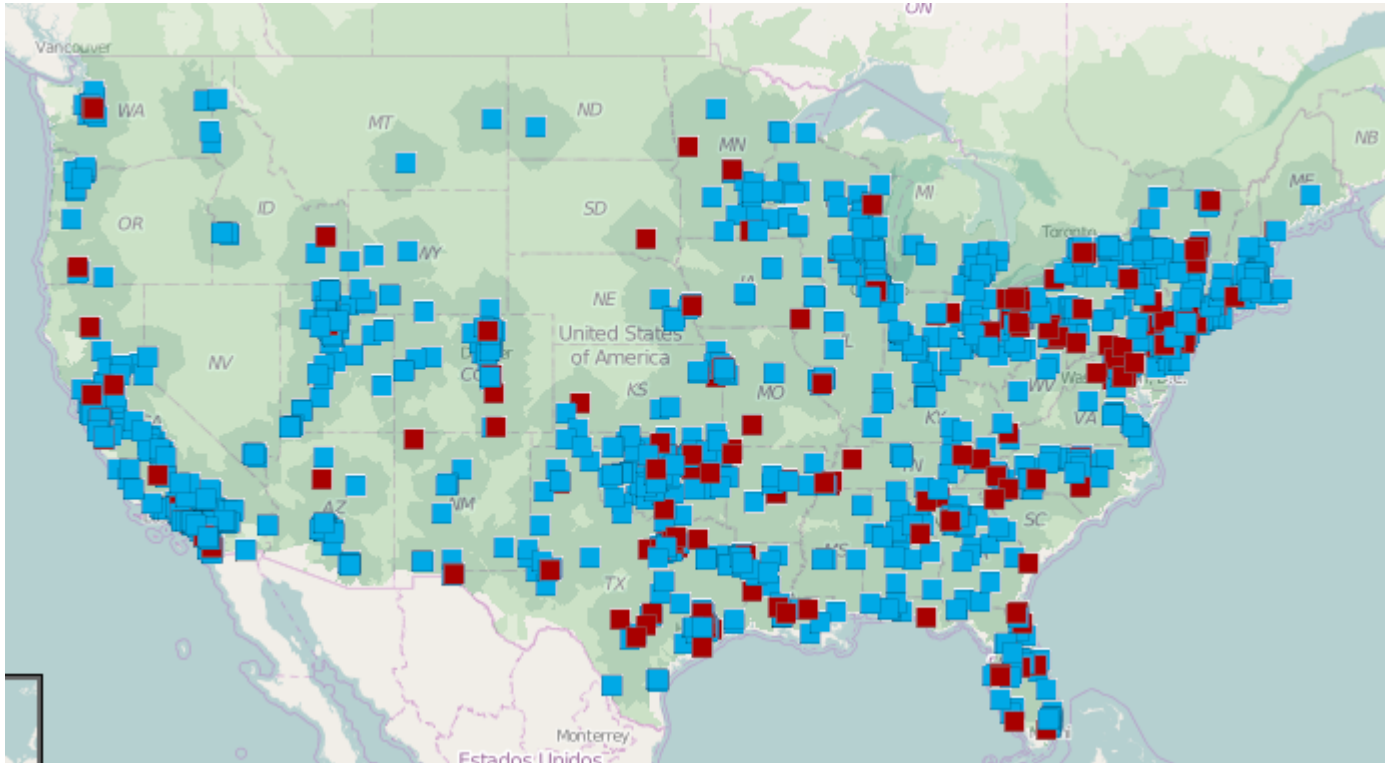


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\$3.27/\$2.40

OK:  
\$2.79/\$1.66

PA:  
\$3.16/\$2.15

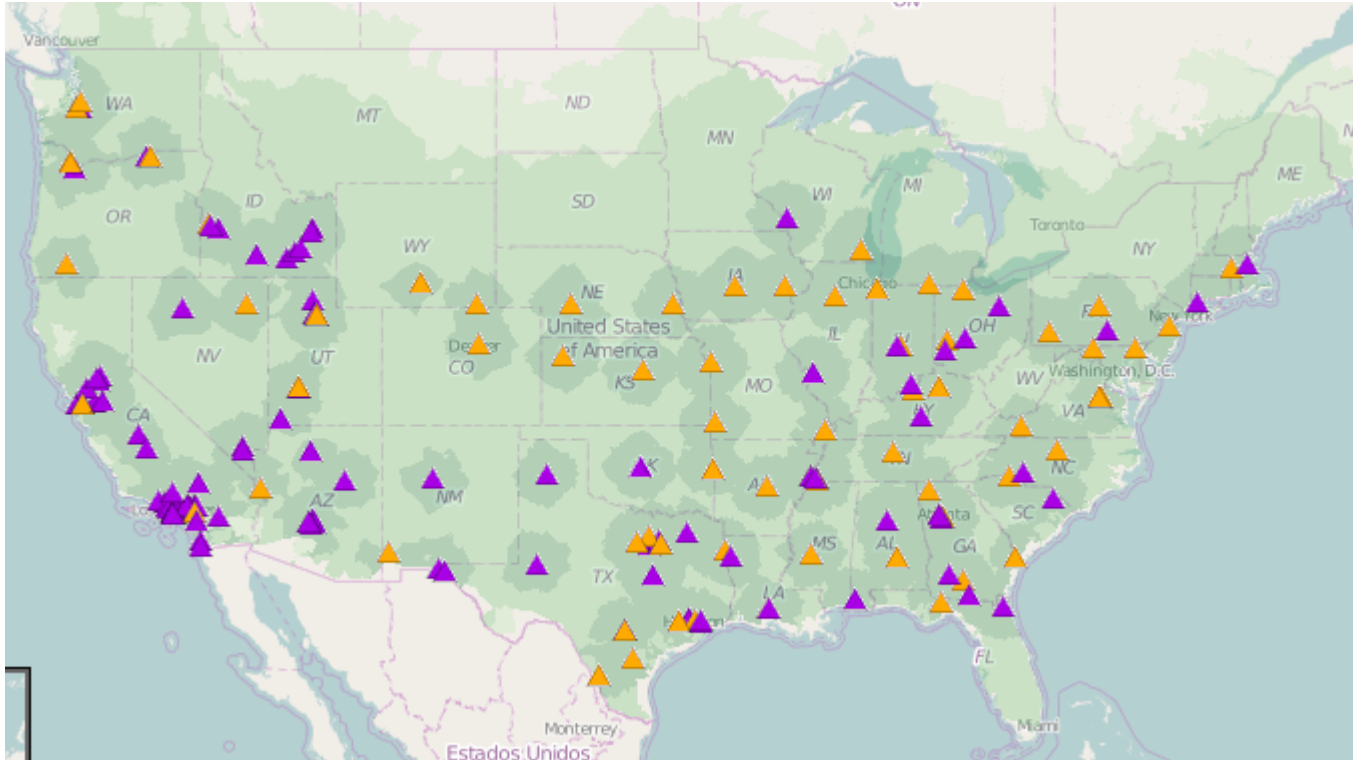
# Fueling availability: CNG



- Extensive pipeline infrastructure
- **1,556 active**
  - 827 public
  - 729 private
  - 1,050 HD-capable
- **189 planned**
  - 139 public
  - 50 private
  - 145 HD-capable



# Fueling availability: LNG



- Planned installations along major freight routes
- Clean Energy Fuels, truck stop chains leading development
- **112 active:** 74 public, 38 private
- **63 planned:** 62 public, 1 private

# Key trends

- Market driven by large fleet buyers – programmatic purchases
- Purchase decision driven by total cost of ownership/total cost per mile
- CNG fuel system sizes increasing; initial cost and weight decreasing