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PRESIDENT'S MESSAGE

Dear NGVAmerica Members & Colleagues:



I am proud to present you with our association's 2015 Annual Report. This document marks a new tradition of describing how NGVAmerica is leading on initiatives to grow the natural gas vehicle industry and helping our members accomplish their goals.

While global petroleum prices have slowed the marketplace, NGVAmerica has accelerated efforts to advance the industry. We achieved several important policy wins in Congress and state capitols this year that break down barriers and provide incentives to put more NGVs on the road.

We hired new staff to streamline operations and launch our new Technology & Development Committee aimed at addressing the industry's critical safety and technology issues. NGVAmerica also published key industry sales and infrastructure data and continued a tradition of one-on-one support to help our members navigate their needs.

In 2016 our state advocacy committee will lead initiatives in more than 15 states aimed at new legislation to incentivize additional fleets and consumers to purchase NGVs. We will also initiate the next step of our strategic plan to elevate our media and communications programs.

It has been a privilege for me to lead NGVAmerica for the past year, and I have appreciated visiting with many of our members across the country. The industry's best days are ahead, and I look forward to working together in the new year to move our industry forward.

Sincerely,

A handwritten signature in black ink that reads "Matthew Godlewski". The signature is written in a cursive, flowing style.

Matthew Godlewski
President



message from
THE CHAIRS

Dear NGVAmerica Members:



Thank you for providing me the opportunity to chair your national association for the next two years. I am excited to dedicate myself to the important work that only NGVAmerica can do to support our industry.

NGVAmerica's mission is more important than ever. It is the only organization tackling the tough policy issues needed to level the playing field with other transportation fuels. We are also working with regulators on key rulemakings and pushing to expand federal research, development and demonstration

(RD&D) dollars to keep NGV innovation moving ahead. All of this is critical given the near-term challenges of the marketplace.

We also face external threats from those who have an agenda against fossil fuels. NGVAmerica must lead in clearly stating the environmental benefits of NGVs and use credible data to make our case with policymakers, fleets, and consumers. One of my top goals for the association in 2016 is to help our members better communicate our winning environmental message.

The strength of NGVAmerica is the broad representation of our membership. I hope you will stay active next year and join me at this critical juncture in reinforcing our collective efforts to support a robust industry.

Sincerely,

Gordon Exel

*Westport Innovations
Chair*

Dear NGV Colleagues:



It has been an honor to serve as the chair of NGVAmerica for the past two years. When I took the helm in 2013, our organization was in the beginning steps of a transformation to unite the natural gas vehicle industry and build a national association for the future. I'm pleased to tell you that we've made many significant accomplishments and are well on our way.

Over the past two years we have refined our mission, developed a strategic plan around the industry's priorities, and hired a new president

to lead us forward. I am confident that we have put NGVAmerica on the path to deliver great accomplishments for its members and the industry.

While world energy prices have certainly had an effect on the marketplace, we are collectively in a much stronger position now to advance our value proposition to industry stakeholders. Major shippers and countless local and national fleets are heavily invested in the benefits of natural gas. That commitment can only continue.

I would like to thank the many colleagues who have taken this journey with me over the past two years. They have all had an equal hand in reinvigorating our association. I look forward to staying involved and working together on the many opportunities ahead.

Sincerely,

A handwritten signature in black ink that reads "Ron Eickelman". The signature is written in a cursive, flowing style.

Ron Eickelman

Agility Fuels

Chairman: 2013 - 2015





helping our members
GROW THE MARKETPLACE

- › Driving Action in the States to Put More NGVs on the Road
- › Representing our Members in Congress
- › Representing our Members in Federal Regulatory Agencies
- › Communicating the Value Proposition of Natural Gas as a Transportation Fuel
- › Advancing Safety, Technology, and Codes & Standards
- › Supporting the NGV Marketplace

HELPING OUR MEMBERS GROW THE MARKETPLACE

For 27 years, NGVAmerica has been helping its members grow the marketplace for clean-burning natural gas vehicles. Whether it is in the halls of Congress and federal regulatory agencies or in state capitols, NGVAmerica has been instrumental in advancing incentives and breaking down barriers that have resulted in more natural gas vehicles on the road. This year, NGVAmerica made great progress on important initiatives on behalf of the industry:

STATE & FEDERAL ADVOCACY

- › Renewed federal tax credits that provide millions in savings for NGVAmerica members and their customers
- › Secured 2,000-pound federal weight allowance for NGVs – meaning more cargo for NGV carriers
- › Fixed the LNG tax inequity – resulting in \$3,400 in annual tax savings on average long haul LNG trucks
- › Secured fair treatment for NGVs in the Phase 2 HD Truck rulemaking
- › Achieved over \$80 million in new, extended, or expanded state incentives for NGVs
- › Eliminated discriminatory policies in 12 states (DGE for LNG, tax equalization, etc.)
- › Built an aggressive plan to secure more state incentives in 2016
- › Continued to press the industry's case for transparency on how natural gas is dispensed at fueling stations with national weights and measure officials

TECHNOLOGY & DEVELOPMENT

- › Completed integration of the Clean Vehicle Education Foundation into NGVAmerica
- › Hired new staff and launched the Technology & Development Committee
- › Addressed key industry codes & standards, safety best practices, and technology issues
- › Launched work groups for 2016 to support critical issues such as maintenance facility modifications, fuel quality, fuel system inspections, cylinder end of life, LNG, and incident investigation

COMMUNICATIONS & MARKET DEVELOPMENT

- › Increased visibility in the trade press to promote NGV initiatives and industry leadership
- › Produced valuable member resources such as the U.S. Infrastructure Tracking Report, 2014 NGV Sales & Production Report, and a white paper on oil price volatility, updated listing of available aftermarket conversion systems, quarterly tax update for CNG and LNG motor fuel, and weekly legislative updates
- › Promoted the industry at more than 20 events or meetings
- › Executed a successful 2015 North American Conference & Expo in Denver

BUILDING A NATIONAL TRADE ASSOCIATION FOR THE FUTURE

- › Executed the first phase of a new strategic plan including realigning staff and committees
- › Modernized various accounting and internal procedures to streamline the organization
- › Revitalized close collaboration with key allies including the American Trucking Associations (ATA), American Gas Association (AGA), America's Natural Gas Alliance (ANGA), and other D.C. associations
- › Recruited new members and developed new revenue streams to support new programs in 2016

“ There is still more work to do, and NGVAmerica is planning an aggressive agenda for 2016 to build on this year's successes in helping its members expand the NGV marketplace. ”

DRIVING ACTION IN STATES TO PUT MORE NGVS ON THE ROAD

State legislators across the country have taken the lead to create important incentive programs and other policies to grow the NGV marketplace. Many of these programs encourage the construction of natural gas fueling infrastructure and the purchase or conversion of NGVs for fleets and consumers.

STATE GOVERNMENT ADVOCACY COMMITTEE

NGVAmerica's **State Government Advocacy Committee** (SGAC) includes the participation of 44 member companies and over 100 individuals committed to improving state policy and breaking down barriers to put natural gas on a level playing field with other transportation fuels. This year, the committee delivered a variety of important successes for NGVAmerica members:

- › Secured more than \$80 million in new, extended, or expanded state incentives for NGVs
- › Eliminated discriminatory policies in 12 states (DGE for LNG, tax equalization, etc.)
- › Established or extended Federal CMAQ funding of NGVs and stations through state DOTs in several states
- › Expanded push for weight limit exemption for heavy-duty NGVs and sales tax exemption on incremental cost of NGVs with model bill language in key focus states

MEMBERS-ONLY NGV STATE POLICY PORTAL & TRACKING

NGVAmerica's **Policy Portal is a user-friendly interface** from which members can stay up-to-date on state policy issues as tracked and analyzed by NGVAmerica. In 2015, NGVAmerica tracked more than 350 bills affecting the NGV marketplace. The NGV Policy Portal includes information on existing state incentives, legislative proposals, and available funding opportunities. Profiles also describe individual state demographics, political landscapes, transportation profiles, vehicle markets, and energy production.

2016 ACTION PLAN

NGVAmerica’s leadership **developed a plan** to advance even more pro-NGV policy in states in 2016. Stakeholder groups have been

formed in the key states and legislative opportunities identified.

2016 STATE ACTION PLAN FOCUS STATES

STATE	NGV POLICY GOALS
California	Pursue cap and trade funds for heavy-duty (HD) vehicle grants; RNG infrastructure funding; incremental cost sales tax exemption; HD NGV weight limit exemption
Colorado	Simplify NGV tax credit calculation; allow NGV tax credit to be taken by dealership
Massachusetts	Establish NGV grant incentive program
Michigan	Establish NGV and station grant or tax credit program; establish method of sale (MoS)
Minnesota	Vehicle and station grants; utility NGV promotion and grant programs; establish GGE, DGE, and MoS
New Jersey	Establish NGV grant/other incentive program
New Mexico	Joint Senate and House NGV Memorial; HD NGV weight limit exemption; incremental cost sales tax exemption

STATE	NGV POLICY TO INTRODUCE
New York	Update regulations for NGVs and ports/tunnels/bridges; establish GGE, DGE, and MoS
Ohio	Current House bill still active for NGV tax credits and grants; establish GGE, DGE, and MoS
Oklahoma	Extend loans for HD NGVs
Pennsylvania	Work to extend Act 13 NGV grants for HD fleet vehicles
South Carolina	Carryover House bill, which includes adding LNG to alternative fuels list; establishing GGE, DGE, and MoS; weight limit exemption; incremental sales tax exemption; and station and vehicle tax credits
Utah	Increased funding for current vehicle and station grant program; establish incremental cost sales tax exemption and MoS

Note: data current as of 12/15/15

SPOTLIGHT ON CA

NGVAmerica collaborates closely with the **California Natural Gas Vehicle Coalition** on key issues that promote the growth of NGVs in California and have the potential to impact the broader marketplace.

- Secure additional funding for NGVs under existing and new grant programs
- Gain continued investments in NGV R&D activities
- Promote expanded opportunities for renewable natural gas under California’s Low Carbon Fuel Standard
- Encourage expanded opportunities for natural gas vehicles in a variety of fleet vehicle operations

REPRESENTING OUR MEMBERS IN CONGRESS

Federal policy has the greatest impact on the NGV industry and continues to be a critical focus of NGVAmerica's work in Washington. The Federal Government Advocacy Committee (FGAC) develops and promotes legislation in response

- › Renewed federal fuel and infrastructure tax credits that provide millions in savings for NGVAmerica members and their customers
- › Secured 2,000-pound federal weight allowance for NGVs – meaning more cargo for NGV carriers
- › Fixed the LNG tax inequity – resulting in \$3,400 in annual tax savings on average long haul LNG trucks

to federal policies that influence the deployment and use of NGVs. Despite a tough year of political rancor and division in the Congress, NGVAmerica was successful in accomplishing several pro-NGV initiatives:

- › Added new NGVs on the GSA leased vehicle schedule
- › Won critical language addressing cylinder safety rulemakings and inspection procedures at DOT
- › Developed new DOE appropriations report language to promote NGV RD&D

FUEL & INFRASTRUCTURE CREDITS

Fuel and infrastructure tax credits have **helped accelerate the adoption of natural gas** as a motor fuel. However, the current cycle of retroactively applying these credits creates budget uncertainty for both fuel providers and customers. The natural gas fuel and infrastructure tax credits have been renewed for 2015 and 2016 and include:

- › The \$0.50 per gallon credit/payment for the business use of natural gas as a transportation fuel
- › The 30 percent/\$30,000 investment tax credit for alternative vehicle refueling property, and the 30 percent/\$1,000 tax credit for home refueling appliances

HIGHWAY BILL REAUTHORIZATION - KEY NGV ISSUES

In December, Congressional leaders passed and the President signed into law the **Fixing America's Surface Transportation (FAST) Act** to fund America's transportation infrastructure for the next five years. The FAST Act includes significant provisions for natural gas vehicles that NGVAmerica has been advocating for, including:

- › Weight allowance for NGVs on federal roads — provides a weight allowance for vehicles powered primarily by natural gas to exceed federal weight limits up to a maximum of 82,000 pounds to allow for the additional weight of natural gas fueling systems and tanks
- › Fuel economy credits for NGVs — creates regulatory parity for OEMs calculating the fuel economy of bi-fuel NGVs
- › Expansion of CMAQ program — amends the CMAQ program to clarify that port facilities qualify for funding even if located in areas that are in non-attainment
- › Extension of HOV lane access for NGVs — amends toll and high occupancy lane provisions for dedicated alternative fuel vehicles, such as NGVs, through September 2025
- › Alternative fuel infrastructure corridors — creates opportunities to develop alternative fuel infrastructure corridors, including natural gas fueling stations, along major national highways

LNG FUEL TAX INEQUITY WIN

In July 2015, **Congress finally moved to correct the LNG tax inequity**, which had been a long time priority for NGVAmerica. Beginning January 1, 2016, LNG will be taxed per the diesel gallon equivalent (DGE) rate of

\$0.243, and the DGE is now also defined to be 6.06 pounds of LNG. This change places LNG on parity with diesel fuel by taxing the fuels equally based on energy content, rather than volume.

2016 LEGISLATIVE OBJECTIVES

During the second session of the 114th Congress, our goals for federal advocacy are to **strengthen and expand** the achievements of 2015 and previous years. The committee will continue its outreach and educational efforts that open additional public and private investments in natural gas vehicles. This includes:

- › Long term extension of the alternative fuel and infrastructure tax credits
- › Adjustment of the 12 percent federal highway excise tax penalty on NG heavy-duty trucks and tractors
- › Development of new federal RD&D funding initiatives
- › Long-term vehicle tax credits
- › Encouraging the use of natural gas in marine and rail applications
- › Correction of the federal tax disparity for LNG used on inland waterways
- › Supporting investment in the production of dedicated and bi-fuel light-duty vehicles

REPRESENTING OUR MEMBERS IN FEDERAL REGULATORY AGENCIES

Beyond the halls of Congress, federal regulatory agencies have a great impact on the NGV industry. Potential regulatory actions include motor vehicle safety standards, motor fuel taxation, fuel economy standards, and emissions standards.

NGVAmerica actively monitors federal agency programs and activities to ensure that regulations and policies provide fair and equitable treatment for NGVs, and encourage the expanded use of natural gas in transportation. In addition to informing members of impending regulatory actions, NGVAmerica also actively consults with its members to understand their viewpoints to inform our discussions with federal agencies.

NATIONAL CONFERENCE ON WEIGHTS AND MEASURES (NCWM) DIESEL GALLON EQUIVALENT STANDARD

Adoption of a DGE standard and retention of the GGE standard for selling natural gas at retail fueling stations **continues to be an important issue** to the NGV industry and a priority for NGVAmerica. For the second year, the NCWM despite the overwhelming support of state officials was unable to pass the DGE standard due to strong opposition of local officials from a limited number of states. NGVAmerica, however, succeeded in preventing the alternative kilogram proposal from coming to the floor for a vote. NGVAmerica will continue its leadership on this issue by working with members and allies to pass the DGE standard in 2016.

NATIONAL AMBIENT AIR QUALITY STANDARDS FOR OZONE

The U.S. EPA has proposed plans to **tighten the nation's air quality standard** for ground level ozone pollution. In the past, tighter ozone standards have presented an opportunity for state and local authorities to promote the expanded use of NGVs. NGVAmerica is monitoring this rulemaking to ensure that NGVs continue to be an important pathway for communities to achieve greater air quality standards.

MD & HD VEHICLE GHG & FUEL EFFICIENCY RULEMAKING

The U.S. Environmental Protection Agency (EPA) and National Highway Traffic Safety Administration (NHTSA) issued **proposed regulations** addressing greenhouse gas and fuel efficiency requirements for new heavy-duty vehicles that will take effect starting in 2018 for trailers and in 2021 for engines and trucks. NGVAmerica met with the agencies to help shape the regulations to ensure fair treatment for natural gas vehicles. The proposed regulations could cut GHG emissions by approximately one billion metric tons and lower fuel costs by about \$170 billion.



COMMUNICATING THE VALUE PROPOSITION OF NATURAL GAS AS A TRANSPORTATION FUEL

NGVAmerica serves as the national voice for the NGV industry and promotes the greater use of NGVs through a variety of communications work.

WEBSITE, SOCIAL MEDIA, ETC.

The NGVAmerica website, www.ngvamerica.org, is the industry's most comprehensive online resource and reaches thousands of visitors each month. The website's Member Center provides a catalog of useful resources, including audio and slide presentations,

conference papers, and reports compiled and routinely used by NGVAmerica staff. NGVAmerica also engages the public on industry developments on Facebook, Twitter, LinkedIn, and YouTube.

NGVAMERICA NEWS

NGVAmerica News is a weekly newsletter and website, available at www.ngv.com, which features the latest news on NGV technologies, fleet deployments, station development, state and federal policies, grants and incentives, and the high-horsepower market.



ADVANCING SAFETY, TECHNOLOGY, AND CODES & STANDARDS

The performance and safety of NGVs, natural gas fueling infrastructure, and maintenance facilities is the foundation upon which a vibrant NGV market can grow. This year, NGVAmerica reaffirmed its leadership in this area by assuming the work of the Clean Vehicle Education Foundation and hiring new staff to launch a Technology & Development Committee. The Committee will serve NGVAmerica members by working with federal agencies and industry stakeholders on NGV technology development, codes and standards, best practices, and other industry safety issues.

“
In our growing Industry, it's critical for NGVAmerica members and all stakeholders to take part in the new Technology & Development Committee. We have important work to modernize and streamline key safety/performance/environmental codes and standards to position the industry for the future.

*Ron Eickelman
Agility Fuels
Chair, NGVA Technology &
Development Committee*

”

LOOKING AHEAD TO 2016

NGVAmerica's Technology & Development Committee **established goals and developed priorities** for 2016, including ten working groups on key NGV issues:

- › Fuel system inspection
- › Maintenance facility modifications
- › Gas quality
- › Codes & standards
- › Cylinder end of life
- › Liquefied Natural Gas (LNG)
- › Incident investigations and root cause analysis
- › Research & development
- › Emissions
- › Marine & rail

SUPPORTING THE NGV MARKETPLACE

NGVAmerica supports market development with various outreach and educational efforts that include white papers, speaking engagements, educational presentations, trade show participation, market data collection and analysis, and marketing collateral. This work assists members in their sales and marketing activities by providing the information and tools necessary to advance their efforts.

US INFRASTRUCTURE DATA ANALYSIS & REPORTING

NGVAmerica creates and distributes a **monthly U.S. Infrastructure Report** derived from information collected by the U.S. Department of Energy Office of Energy Efficiency and Renewable Energy Alternative Fuel Data Center. This analysis, which is exclusive to members, packages large amounts of data into insightful graphs, charts, and tables.

As an extension to this analysis, NGVAmerica launched a U.S. station-mapping tool that visually displays the nation's natural gas stations and highlights the vehicle ranges supported by existing and planned stations in increments of 100, 400, and 600 miles. This NGVAmerica Station Analysis Map, which is updated monthly, also details station accessibility and contact information.

ANNUAL NGV MANUFACTURING & SALES REPORT

NGVAmerica conducted its **third annual survey** of natural gas vehicle OEMs, engine manufacturers, and certified small volume manufacturers (SVMs) to collect and aggregate 2014 manufacturing and sales data. This data was published as the 2014 NGV Production and Sales Report and provides production and sales totals for the 2014 calendar year, and analysis of market trends for light, medium, and heavy-duty vehicles.

OIL PRICE VOLATILITY WHITE PAPER

In response to falling oil prices, NGVAmerica developed and published a white paper in January that discusses the variety of factors that drive the price of transportation fuels. The analysis **reveals a compelling case** for the continued transition to NGVs, especially among commercial and government fleets where transportation costs represent a significant portion of their budgets. The report was prepared for NGVAmerica members and was used with key industry trade press.

ONE-ON-ONE MEMBER SUPPORT

Each month, NGVAmerica staff fields **dozens of requests for assistance** from members on a variety of topics. NGVAmerica's expert support includes technical assistance, legislative updates, funding opportunities, and broad advice and guidance. NGVAmerica also provides assistance to Clean Cities Coordinators, fleet management and infrastructure developers, the investment community, and the general public.



2015 NORTH AMERICAN NATURAL GAS VEHICLE CONFERENCE & EXPO

The 2015 North American Natural Gas Vehicle Conference & Expo was the largest trade show dedicated to the NGV industry and a key event for stakeholders and prospective investors. Over 700 attendees participated in a sold out exhibition floor that showcased the latest technology, products, and services to industry decision makers.

This year's conference in Denver featured a comprehensive, multi-day educational program covering a broad range of topics most pressing to the NGV industry. Numerous social functions offered leaders across the NGV value chain an opportunity to network and share ideas on collaborating to grow the marketplace.

NGVAMERICA ACHIEVEMENT AWARD WINNERS

NGVAmerica Achievement Awards recognize national innovators and early adopters for their outstanding leadership and vision in advancing natural gas as a transportation fuel. Every year, NGVAmerica members submit nominations recognizing their customers, partners, and industry advocates for their contributions to the industry.





THE RECIPIENTS OF THE 2015 NGVAMERICA ACHIEVEMENT AWARDS

Douglas B. Horne

Lifetime Achievement Award

John B. Dimmick

Lifetime Achievement Award

Joanna D. Underwood

Lifetime Achievement Award

Governor John Hickenlooper (D-CO)

NGV Public Policy Champion

Senator Michael F. Bennet (D-CO)

NGV Public Policy Champion

Bimbo Bakeries USA

Natural Gas Fleet Program

City of Grand Junction, CO

RNG, CNG Fleet & Station Program

Core-Mark International

Exemplary NGV Fleet Program

Matera Paper Company

Natural Gas Fleet Program

Neapolitan Express

Innovative NGV Application

Barry P. Carr

*23 Years of Exemplary NGV
Industry Leadership*

Procter & Gamble, Co.

NGV Fleet & Station Program

State Sen. Wilton Simpson (R-FL)

NGV Public Policy Champion

Raven Transport, Inc.

LNG Fleet Program

Clean Energy Fuels Corp.

Redeem, Innovative RNG Leadership

Rush Enterprises, Inc

*Outstanding NGV Market
Development Leadership*

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