FCVs and Hydrogen in California

Preparing for market launch

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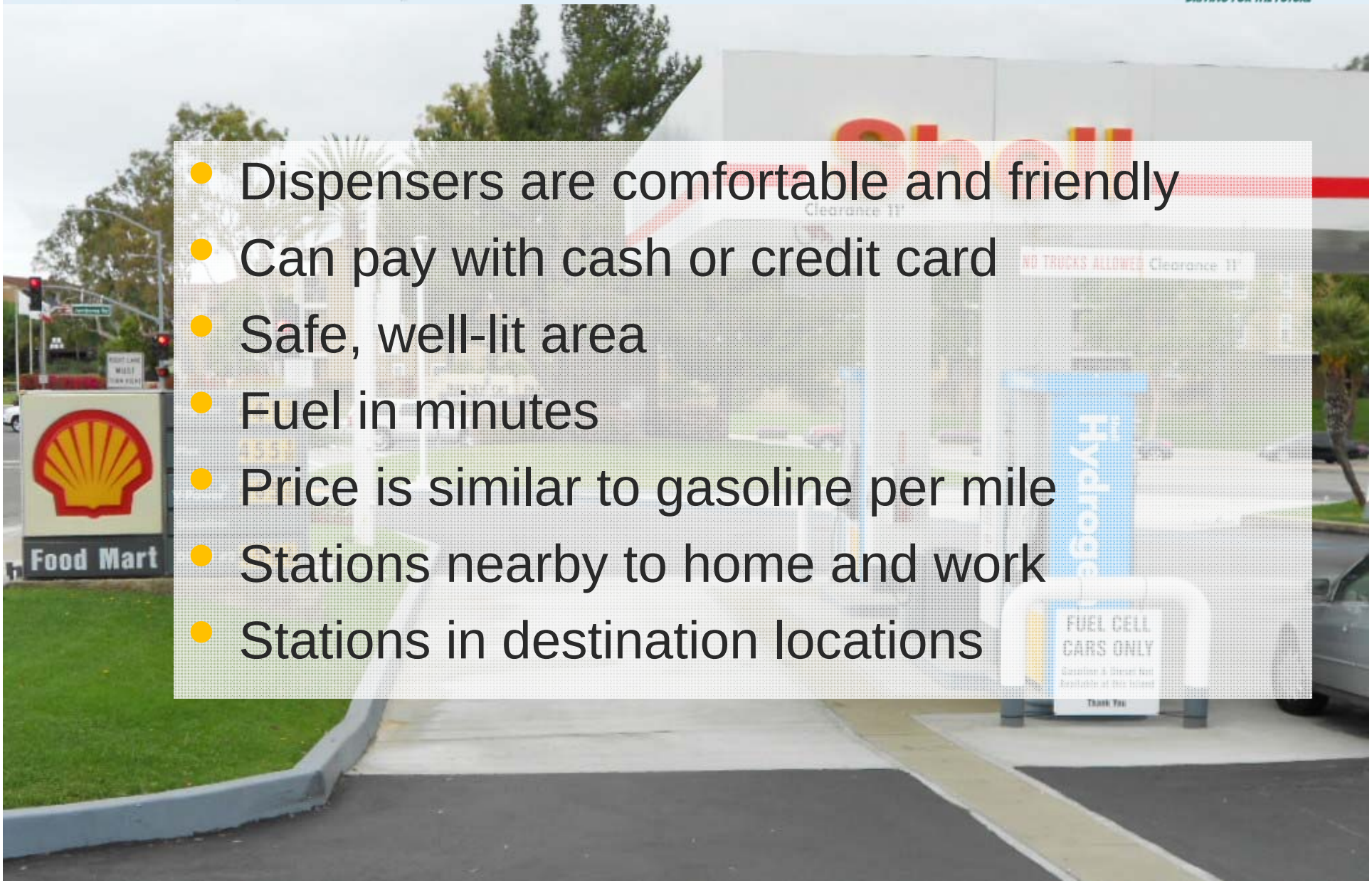
Progress to date

- ~200 FCVs&FCBs on road today
- >4 million road miles
- 6 public H_2 stations
- 2 public stations open soon
- 11 new/upgrade stations in development
- California is on track to have approx. 20 public H_2 stations by end of 2013
  - And another 9+ in funding process now

Crossing the Bridge

A fuel cell vehicle is electric!

Fueling opportunities



- Dispensers are comfortable and friendly
- Can pay with cash or credit card
- Safe, well-lit area
- Fuel in minutes
- Price is similar to gasoline per mile
- Stations nearby to home and work
- Stations in destination locations

Access to stations

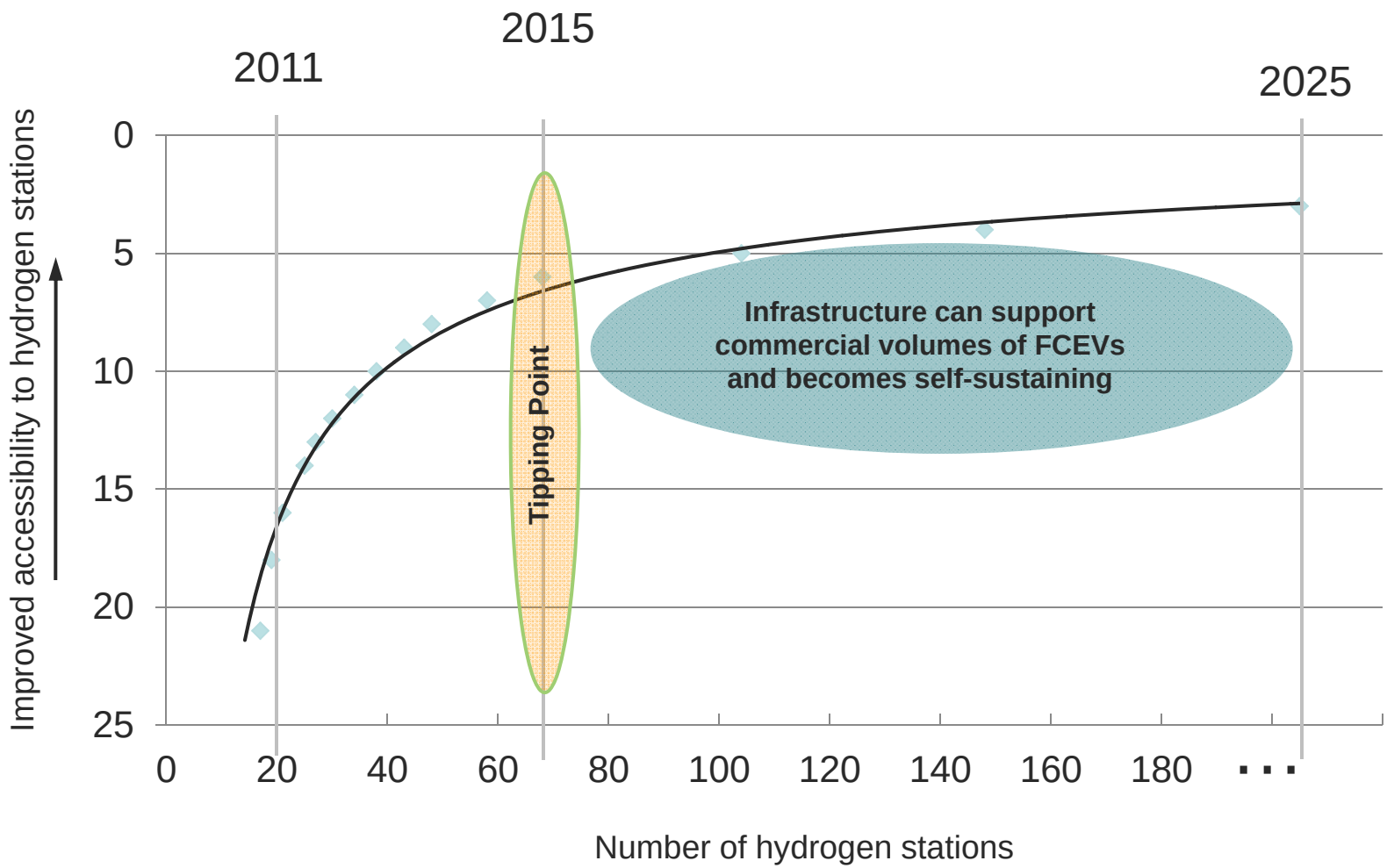
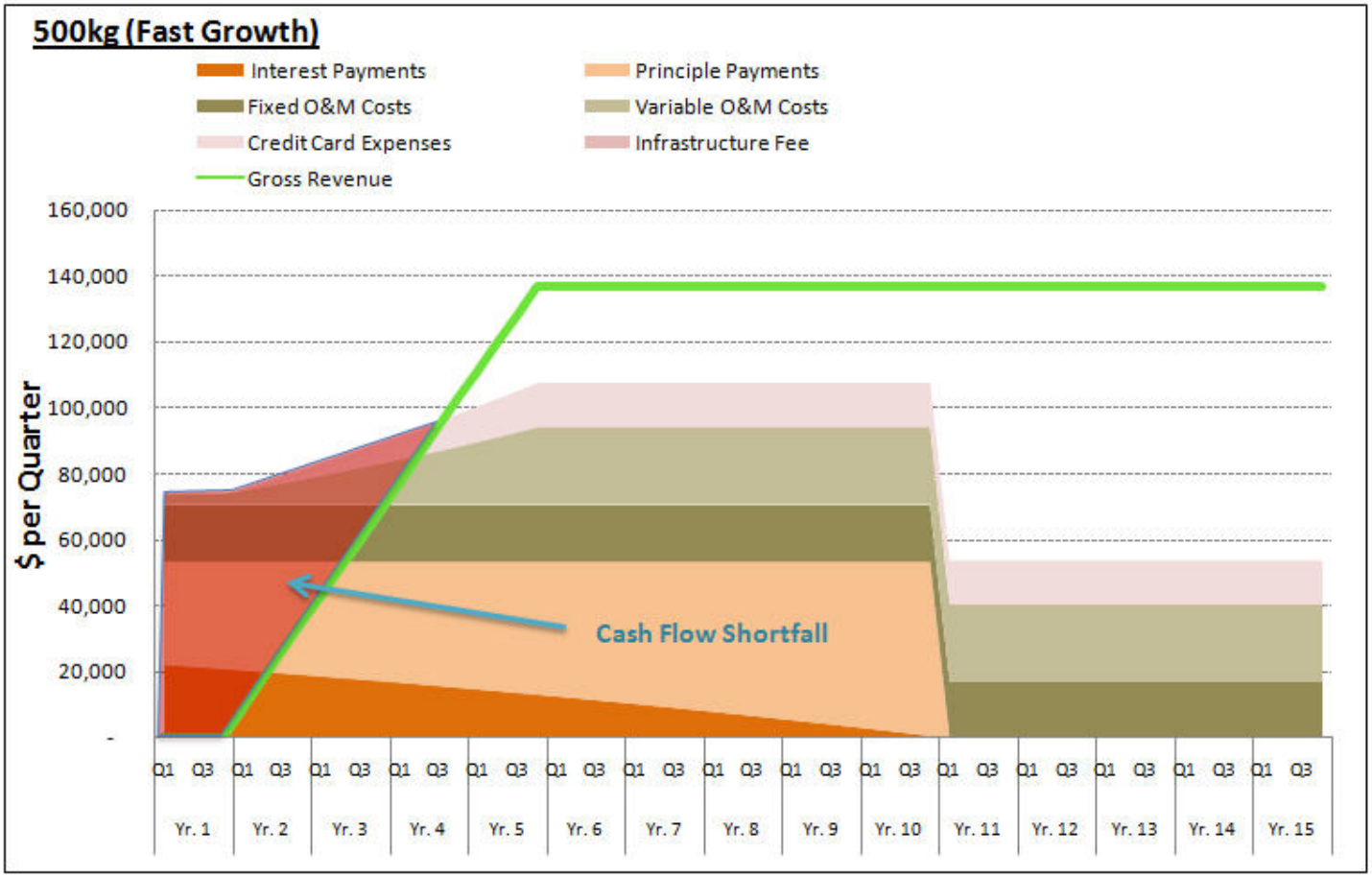


Chart courtesy of National Fuel Cell Research Center at UC Irvine

What is the "right" number?

- OEMs identified need for 68 stations by 2015
  - 46 stations in five urban clusters in California
  - 22 stations to seed new clusters and build the statewide network
- 37 stations already in process or expected to be funded
- 31 more stations needed by 2015
  - Additional funding needed

Supporting early stations

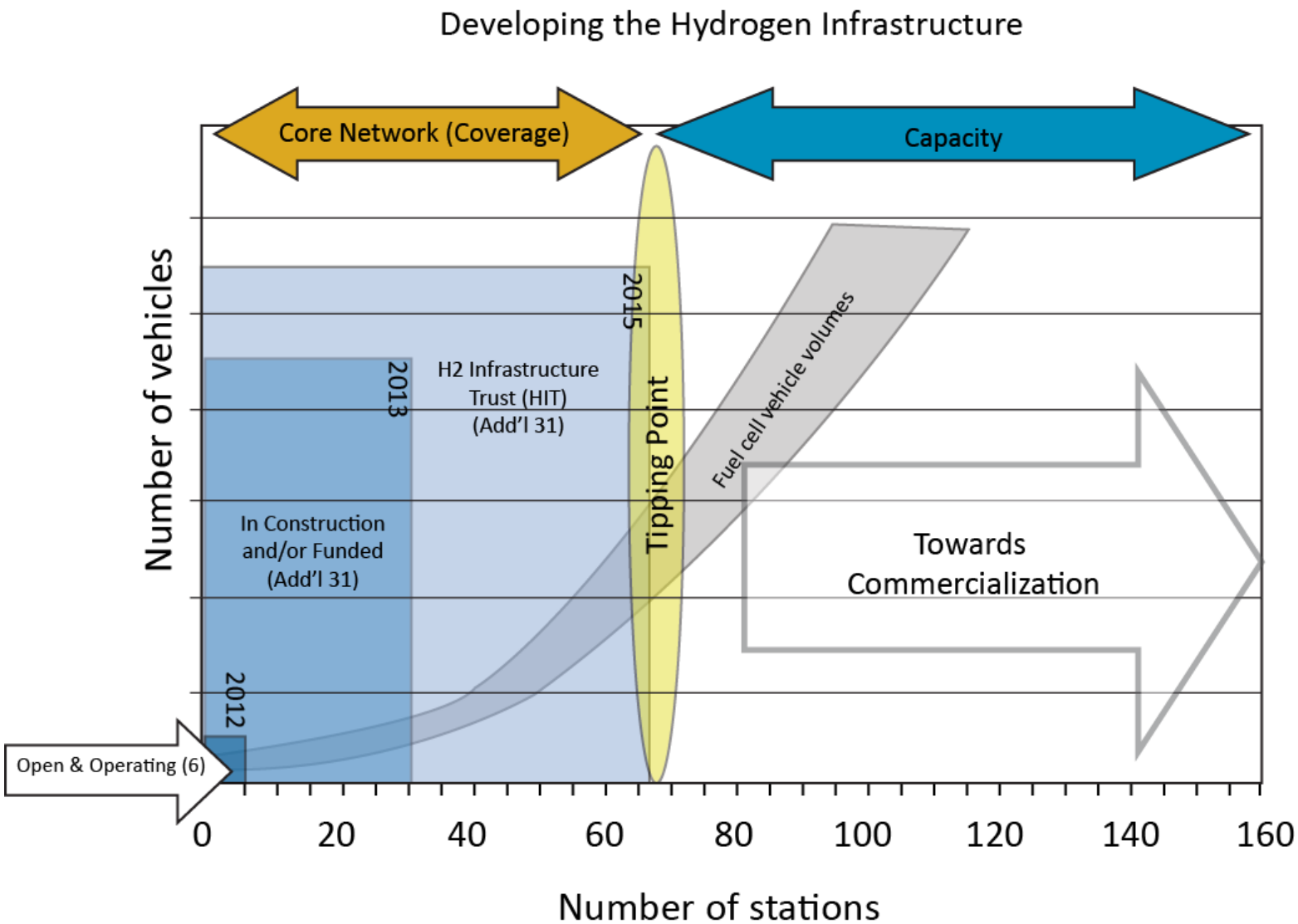


Source: Energy Independence Now
Key Assumptions: 100% Debt Financed, $1.5M, 500 kg/day capacity station, $3 retail margin, up to 100% capacity utilized, Fast Growth (cluster station) →$670K Shortfall

The "right" number provides…

- Coverage
  - Fueling opportunities
- Confidence
  - Automakers build volume
  - Customers purchase FCVs
- Commercial
  - To launch market and build capacity

H_2 station and vehicle growth



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