



4th annual
NGVI
US2015

Natural Gas Vehicle Infrastructure

Conference & Exhibition | 18-19 June, Grand Hyatt, Atlanta, GA



Breaking the Chicken & Egg paradox:

50 Fleets already signed up to attend

Role out infrastructure across the USA to stimulate demand and deliver growth in NGV uptake

Come together in Atlanta to create a national strategy that will re-energise the NGV market in the USA in partnership with the nation's biggest industry influencers

CHAMPIONS OF NATURAL GAS VEHICLES:



Mike DelBovo,
President,
Saddle creek



Stephen Handy,
House of Representatives,
Utah



Charles Musgrove,
COO,
Dillon Transport



Rob Neitzke,
President,
Cummins Westport

- **STATE OF THE MARKET:** Better understand the macroeconomic factors effecting the uptake of NGVs including oil prices, state directives and the differing roles of CNG & LNG
- **PROVE ROI FOR AMERICA'S FLEETS:** Cut through the hype for a true picture of natural gas fuel economics and boost NGV uptake across the USA
- **VEHICLES AND ENGINES:** Examine the future of NGV technology by speaking directly to vehicle and engine OEMs, hear their plans and confront the conversion cost issue head on
- **INFRASTRUCTURE – CONNECTING THE DOTS:** Deliver a comprehensive, demand responsive and reliable gas supply network for America's fleets where it's needed most
- **STRUCTURE PROFITABLE PARTNERSHIPS:** Work closely with key state/federal influencers and create effective business models with Utilities, C-Stores and Fleets

WHY IS NGV INFRASTRUCTURE 2015 DIFFERENT?

- **Fleet focus in a new geography** – this year promises to deliver 75+ fleets; brand new faces, at a senior level from the East and the South of the USA
- **National strategy focus** – senior level support at a state and federal level to help drive a national roll out of NGVs
- **Partnerships:** We know infrastructure delivery and the business case for converting are the two big issues in NGV right now. Developers and fleets need to be on the same page, so we're simplifying this year's agenda to bring everyone together. One track focused on infrastructure and fleet uptake.

MORE TOP SPEAKERS FROM FLEETS, OEMS AND ASSOCIATIONS

Steve Saltzgeber,
Vice President -
Fleet Maintenance,
Republic



Jeff Yap,
VP Global
Automotive, UPS



Jon Coleman, Ph.D.
Fleet Sustainability &
Technology Manager,
Ford Motor Company



Scott Morrison,
Director of
Government affairs,
American Public
Gas Association



Chad Mark,
VP Procurement &
Technology,
Advanced Disposal



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The NGV Infrastructure show has sold out for the past 3 years. Contact us directly to see a list of the thousands of delegates and hundreds of exhibitors that have been involved

Visit the website now for the latest updates on speakers, sponsors and the full agenda WWW.NGVEVENT.COM

"an opportunity for the NGV industry to evolve its national strategy"

THE ONLY NGV SPECIFIC CONFERENCE TO UNITE THE NATIONS LEADERS, UTILITIES, C-STORE'S & FLEETS IN ONE PLACE

The Natural Gas Vehicles (NGV) market in the USA has come to a fork in the road. Having enjoyed impressive growth for several years with an ironclad business case, utilities, convenience stores and fleets alike have seen NGVs become the front-runner in the alternative fuels space. America can now boast over 150,000 CNG/LNG vehicles on the road with many more expected in the next 2 years. Looking forward, Navigant Research sees sales of NGVs up to 3.9 Million vehicles by 2024, whilst the International Energy Agency (IEA) predicts that by 2025, the US and China will account for the vast majority of natural gas fuel usage worldwide.

The policy drive for NGVs is also taking shape. The U.S. Congress has voted to restore incentives and senators on both sides of the aisle have backed pro natural gas legislation. When you add this to technology developments promised by Westport and Volvo, plus significant appetite from convenience stores to satisfy diverse customer needs, there is an enormous opportunity for growth in the American natural gas vehicles market.

But there is an elephant in the room; collapsing oil prices. With the price of oil tumbling to \$50 a barrel, the economics of natural gas have been suddenly put under enormous scrutiny, causing confusion and hesitation for many fleets. Moreover, the perceived high initial costs of conversion and infrastructure development have stalled an otherwise buoyant market. There is no doubt that now is a time of uncertainty for NGVs in the USA.

With these circumstances as a backdrop, FC Gas Intelligence's 4th Annual Natural Gas Vehicles Infrastructure Conference, which is set for June 18-19 in Atlanta, is changing it's focus to deliver what the market really needs now. The focus will be twofold; delivering a national strategy for fuelling infrastructure and re-shaping the way the market approaches fleets. We'll be covering the following core topics:

- 1. THE STATE OF THE MARKET:** Better understand the macroeconomic factors affecting the uptake of NGVs including oil prices, state directives and the differing roles of CNG & LNG
- 2. PROVE ROI FOR AMERICA'S FLEETS:** Cut through the hype for a true picture of natural gas fuel economics and boost NGV uptake across the USA
- 3. VEHICLES AND ENGINES:** Examine the future of NGV technology by speaking directly to vehicle and engine OEMs, hear their plans and confront the conversion cost issue head on
- 4. INFRASTRUCTURE – CONNECTING THE DOTS:** Deliver a joined up, demand responsive and reliable gas supply network for America's fleets where it's needed most
- 5. STRUCTURE PROFITABLE PARTNERSHIPS:** Work closely with key state/federal influencers and create effective business models with Utilities, C-Stores and Fleets

This year's show is intentionally organized to encourage cross industry dialogue, national strategy and business development. This is not a place for the industry to speak to itself – it is an opportunity for the industry to evolve its national strategy and

deliver a strong message to fleet customers to ensure they have the vehicles, the infrastructure and most importantly the business case for switching to natural gas.

To that end, it's vital that you have the opportunity to hear from both the high level strategic stakeholders and the fleets customers on the ground, and this year's show delivers just that. We have two House Representatives from Utah and Indiana addressing the benefits of NGVs in their states plus an explanation of why they have backed pro NGV policies. Joining them are infrastructure specialists operating across the USA – Trillium and Clean Energy Fuels. Both have ample experience in delivering natural gas fuelling solutions and working closely with fleet customers and will be on hand to share their expertise with you. Of course, no NGV show would be complete without bringing fleet customers to the table to talk about their needs and discuss the business case. To that end, UPS, Republic Services, SaddleCreek and Emerald Coast Utilities are just some of the fleets engaging in dialogue at the conference. They can give you the full story of how they brought NGVs to fruition in their operations.

Don't miss out on this fantastic opportunity to drive forward the NGV agenda in the US. With a proven track record of getting over 500 people on site, the NGV Infrastructure conference in Atlanta is a must attend for anyone serious about making NGVs a reality. Early booking is strongly encouraged as places are on a first come first served basis. For more information on how you can register, go to www.ngvevent.com or contact the conference directors directly:



Oliver Saunders
Head of FC Gas Intelligence

osaunders@fc-gi.com
1-800 814 3459 ext 7185



Ruggero Galtarossa
Conference Organizer

ruggero@fc-gi.com
1-800 814 3459 ext 7559



"Well attended by key players in the natural gas market. Excellent balance between government, users and suppliers at the conference and in the presentations" Volvo Trucks



"FC Gas did a great job organizing the conference with numerous topics and diverse points of view, along with tours that were sold out." Clean Energy Fuels



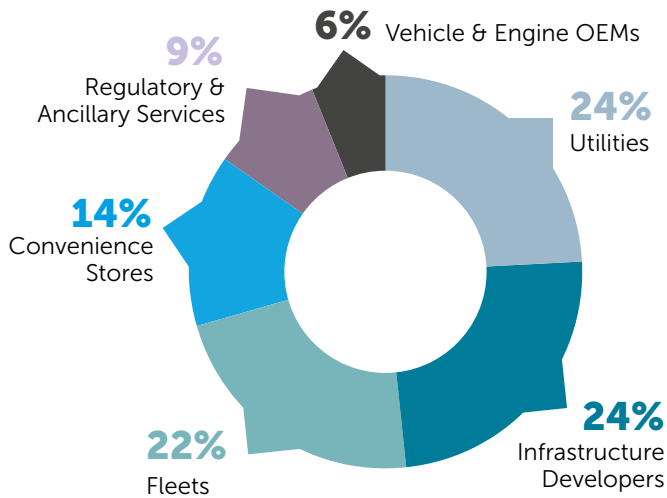
"I have not attended a conference with so many end users present before" Westport

Early bookers get the best prices! www.ngvevent.com

2015 ATTENDEES AND SPEAKERS

TAKE A LOOK AT HOW OUR CONFERENCE BREAKS DOWN AND ENSURE YOU ARE MEETING THE DELEGATES THAT YOU CAN LEARN FROM AND DO BUSINESS WITH:

Delegate profile:



Look at which companies attend our events:



Top Speakers:

Alabama Clean fuels

Mark Bentley
Executive Director



American Public Gas Association

Scott Morrison
Director of Government Affairs



Clean Energy

Chad Lindholm
Vice President



Coalition for Renewable Natural Gas

Johannes Escudero
CEO



Florida Trucking Association

Ken Armstrong
President & CEO



Republic

Steve Saltzgiver
Vice President - Fleet Maintenance



Saddlecreek

Mike DelBovo
President



Trillium

Bill Zobel
VP Market Development



U.S. Gain (U.S. Venture Inc.)

Bill Renz
General Manager



UPS

Jeff Yap
VP Global Automotive



Ford Motor Company

Jon Coleman
Fleet Sustainability & Technology
Manager



Mansfield Clean Energy Partners

Ira Pearl
President & COO



Utah State

Stephen Handy
Representative



Emerald Coast Utilities

Jim Roberts
Public Information Officer



Volvo

Frank Bio
Director



Kwik Trip

Joel Hirschboek
Alternative Fuels,



Questar Fuelling

Judd Cook
Director



Paper Transport

Ben Schill
Director



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BREAK THE CHICKEN & EGG PARADOX: ROLE OUT INFRASTRUCTURE ACROSS THE USA TO STIMULATE DEMAND AND DELIVER GROWTH IN NGV UPTAKE

2015 AGENDA - JUNE 18-19

Re-energise the NGV Market in the USA in partnership with the nation's biggest industry influencers

DAY 1 – FLEET FOCUS

PLENARY SESSIONS

NGV Market Dynamics – where are we heading?

- Examine the changing macroeconomic factors influencing the NGV market and discover what the short, medium and long term affects will be on your business
- Region by region; look at the NGV hotspots where development is moving fast and areas without infrastructure that need more investment
- Get the inside track on fleet demand and the nature of that demand across the USA

Steven Handy, *House of Representatives*, **Utah**

Judd Cook, *Director*, **Questar Fuelling**

Mike DelBovo, *President*, **SaddleCreek**

Nelson Vasquez, *Senior Consultant*, **Nexant**

Federal and state backing for NGVs

- See how states and the federal government are supporting the uptake of natural gas vehicles through positive policy action
- Hear from different states on how they work their NGV programs and the tangible effect these initiatives are having on the market
- Look into the crystal ball – are there any positive pieces of alternative fuel and NGV legislation going through on a federal level?

Johannes Escudero, *CEO*, **Coalition for Renewable Natural Gas**

Ken Armstrong, *President & CEO*, **Florida Trucking Association**

Mark Bentley, *Executive Director*, **Alabama Clean Fuels**

Jeff Sheffield, *Executive Director*, **North Florida Clean fuels Coalition**

LNG vs. CNG – How has the emphasis shifted and why?

- Find out what will become of the long haul trucking market...is there still a strategic role for LNG to play in the USA?
- Discover how CNG has made huge gains in certain market verticals and look at how you can emulate this success
- Take a long term view of the NGV market and the level of infrastructure build out required in both CNG and LNG

The effect of tumbling oil prices on the US NGV market

- Anticipate and mitigate the impact of the oil price drop on fleets in the USA
- Find out from experienced industry forecasters whether the low oil price will be a short term blip or a longer term norm that the NGV industry has to face
- Adjust your strategy and approach with fleets by taking into account the status quo and presenting a positive business case for NGVs

Ira Pearl, *President & COO*, **Mansfield Clean Energy**

PANEL SESSION: Getting NGV entrenched in fleets across the USA

- Find out from the top fleets in the USA what their key metrics are when assessing natural gas vehicles and the role they play within their fleets.
- Take the opportunity to hear about the bumps in the road they faced and how they overcame these to successfully implement NGVs

Ben Schill, *Director*, **Paper Transport Inc.**

Jim Roberts, *Public Information Officer*, **Emerald Coast Utilities**

RETURN ON INVESTMENT

Modelling return on investment: Case studies in the uptake of natural gas from across the spectrum

- Get a lifecycle perspective on NGV uptake from the companies that have gone through the entire process so you can put numbers on potential returns
- Assess 'hidden costs' and knock on costs that you may not have considered and find out their impact on the business case for NGVs

Matt Nealis, *Project Manager*, **Larson Design Group**

Joseph Reisinger, *Vice President*, **Broadwind Energy**

"I'm on the edge" – Case studies from fleets on the brink of switching to natural gas

- Question the fleets that are actively considering natural gas as a fuel; find out the metrics they use to make decisions and evaluate what is most important to them
- Examine the perceived roadblocks that fleets see when considering the switch and work out how it might be possible to alleviate their worries and concerns
- Focus on the critical factor which pushes a fleet from considering natural gas to actually putting their weight behind natural gas

The other side of the coin; when NGVs don't deliver

- Sometimes natural gas is not the answer – find out why and when gas is not the best alternative fuel option
- Look at the factors that can lead to an underwhelming project and learn how to resolve these factors moving forward
- Get to the bottom of what can derail a successful switch to natural gas vehicles

The Waste Management Company perspective: Full steam ahead with NGVs

- Discover for yourself the widespread success being enjoyed by the top waste disposal companies and see how they are turning early adoption into cash savings now
- Examine where various waste management companies are on their conversion strategy and question them about progress so far
- Talk through the infrastructure that sits behind the huge uptake in natural gas vehicles across the waste management sector

Steve Saltzgeber, *VP – Fleet Maintenance*, **Republic Services**

Chad Mark, *VP – Procurement Technology*, **Advanced Disposal**

Commercial and retail fleets

- Evaluate the relative success so far of large scale fleet conversion and consider the implications of switching to natural gas 'en-masse'.
- Put some numbers on the costs savings you can achieve by switching to CNG by hearing from large scale distribution companies

Mike Britt, *Alternative Fuel Fleet*, **UPS**

Check out the latest program updates on www.ngvevent.com

BREAK THE CHICKEN & EGG PARADOX: ROLE OUT INFRASTRUCTURE ACROSS THE USA TO STIMULATE DEMAND AND DELIVER GROWTH IN NGV UPTAKE

Municipalities – cities and towns making NGVs work for them

- Find out how individual cities and towns can work with state leadership to deliver a coherent cross state strategy that delivers clean fuel objectives
- Determine the value of educating local fleets and recognize how this approach, if started early, can boost uptake and help to alleviate concerns
- Success stories; hear from the municipalities with a long term track record of using, maintaining and saving with NGVs

VEHICLES AND ENGINES

SUPER PANEL: Vehicle OEMs look into the future

- What new vehicles are the top OEMs putting on the market in 2015-16? Get a first look at the new innovations
- Hear from the leading engine developer on their NGV market strategies over the next 2-3 years, and find out how that could impact your own business model and opportunities to partner
- Learn which vehicle and fuel types are best suited for specific applications and regions and discover the right vehicle for your fleet

Frank Bio, *Director, Volvo*

Jon Coleman, *Fleet sustainability and technology manager, Ford*

Engines – What are the options now and what can we expect in the next 1-2 years

- Examine the options for engines moving forward and get timelines from the manufacturers on when new models can be expected
- Look at how new technologies might increase efficiency and effectiveness in the coming years

Rob Neitzke, *President, Cummins Westport*

DAY 2 – BUILDING INFRASTRUCTURE

INFRASTRUCTURE

Designing and building the next generation of CNG stations across the US

- Speak to station builders about the next generation of stations; what improvements can we expect and how will this impact re-fuelling infrastructure in 2015-16
- Take factors such as Fleet Size, Fuel Use, and Fuelling Window to establish when considering the fuel costs; thereby matching user need with supply
- Take a peek at some emerging opportunities in natural gas fuelling such as mobile re-fuelling and renewable natural gas that are starting to take hold and see how they could be utilized

Bill Zobel, *VP Market Development, Trillium*

Judd Cook, *Director of Business Development, Questar Fuelling*

Adam Comora, *President, TruStar*



INDUSTRY PANEL: How to be Successful with CNG

- Get all your questions answered in one place from large and medium Fleets who have demonstrated success, a Truck OEM, Fuel System Manufacturer, Engine Manufacturer, and a Fuel Station Manufacturer.
- Hear case studies from UPS and Dillon on what makes them successful in operating on CNG
- Look at the most Cost effective trucks, engines, fuels systems and station options to meet your needs

Moderator: David Mazaika, *Executive Director,*

Quantum Technologies

Bill Renz, *General Manager, US Gain*

Hugh Donnel, *North American Truck Market Business leader, Cummins Westport*

Jeff Stevens, **Kenworth**

Mike Casteel, *Service Provider, UPS*

Charles Musgrove, *COO, Dillon Transport*

Delivering LNG infrastructure for the long haul market

- Find out the role LNG still has to play in the NGV market
- Discover how to balance factors such as weight, cost, maintenance and range when integrating NGV into your fleet operations - helping you to inform your choice between LNG and CNG
- Evaluate the current offering across the USA for LNG and see where there are obvious supply gaps that need to be filled

Chad Lindholm, *Vice President, Clean Energy*

STRUCTURE PROFITABLE PARTNERSHIPS

Public, Private, or Public-Private Access

- See for yourself how authorized public-private transportation infrastructure partnerships can massively speed up NGV uptake and provide the reliability of supply craved by fleets
- Discover the detail on the interaction between private finance and public finance to better understand how a potential deal might be structured
- Understand how a combination of private and public access can enable potential profit sharing between public and private enterprise resulting in a win-win for both parties

Convenience stores – serving your customers

- Find out why supplying natural gas is increasingly being seen as a strategic norm rather than an optional extra for C-stores across the USA
- With 44% of Americans wanting to see a serious increase in the availability of alternative fuels, find out where natural gas sits in relation to hydrogen, ethanol, biodiesel and electric in terms of priority
- Experienced C-Stores share their experience and forecasts of demand – with an insight into how this might change in 2015-16

Joel Hirschboeck, *Alternative Fuels, Kwik Trip*

The role of utilities

- Several high profile suppliers and producers have pulled back from natural gas – find out why most utilities still see NGV as a massive opportunity
- Does natural gas as a fuel sit high on the priority list for the top utilities and if so how can they turn this into further infrastructure roll out – question top executives and find out
- Discover how working with gas suppliers can be more than a transactional relationship – see how an open dialogue can result in more efficient gas supply

Scott Morrison, *Director of Government Affairs, American Public Gas Association*

Reserve your place today - **1-800 814 3459 ext 7227**

GET YOUR PRODUCTS & SERVICES IN FRONT OF THE NATIONS LEADING UTILITIES, FLEETS & C-STORE'S READY TO PURCHASE NGV SOLUTIONS

SPONSORSHIP & EXHIBITION OPPORTUNITIES AT NGV USA 2015

Is your company looking to get your products and services in front of the major buyers in the North American NGV industry?

If so, the **NGV USA 2015 Conference & Exhibition** provides your company with a host of opportunities to drive business development, expand your pipeline, increase brand awareness and secure major deals.

Just some of our major sponsors in the past year have included:



SPONSORSHIP OPPORTUNITIES

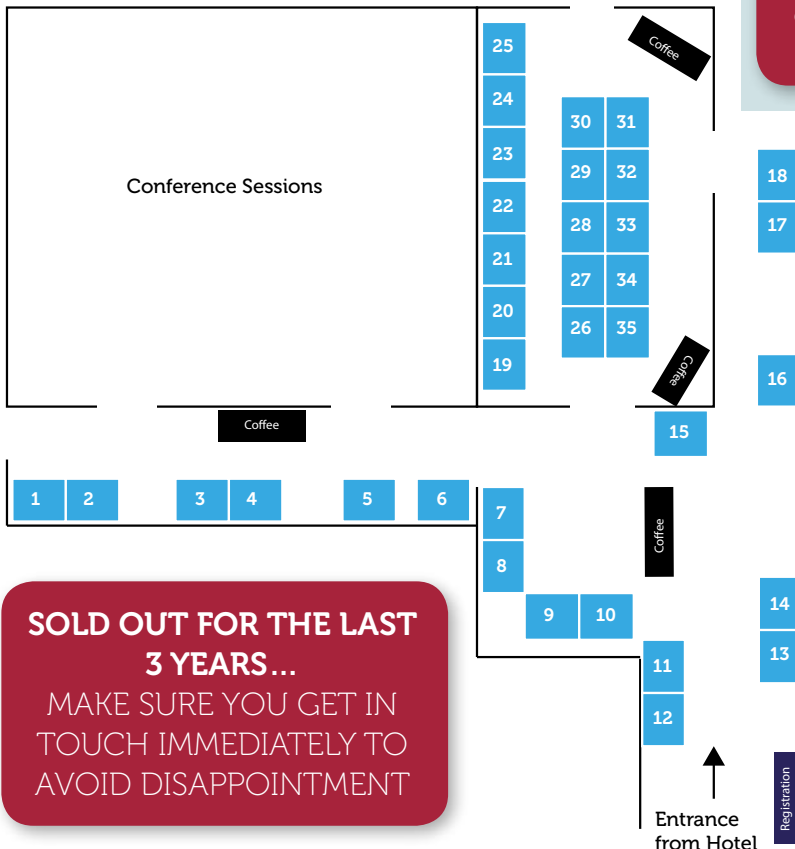
For companies wishing to make a larger impact at the event we offer a host of bespoke opportunities including:

- 1 **Speaking Opportunities** – 30 minute dedicated speaking slot in front of the entire audience
- 2 **Exclusive Workshop** – Host your own company workshop and invite key clients from the attendee list
- 3 **Networking Drinks Sponsorship** – Sponsor the event networking drinks party to create lasting brand awareness
- 4 **Vehicle Displays and Site Visits** – Put your vehicle or infrastructure solution on display allowing delegates to see your products up close and personal
- 5 **Brand Awareness** – Get your company front and centre in the minds of all our attendees through lanyard, lunch, coffee, water bottle, notebook or delegate list sponsorship

For more information on these opportunities as well as others please contact **Charlie Savage** on +44 (0)20 7375 4368 or by emailing csavage@fc-gi.com

PLEASE NOTE – both our exhibition and sponsorship opportunities consistently sell out. To avoid disappointment please contact us ASAP to secure your package today!

FLOORPLAN



"I have not attended a conference with so many end users present before"

Westport

SOLD OUT FOR THE LAST 3 YEARS...
MAKE SURE YOU GET IN TOUCH IMMEDIATELY TO AVOID DISAPPOINTMENT

EXHIBITION HALL

LIMITED PLACES REMAINING FOR 2014!

Secure your booth in our Exhibition this year by calling **Charlie Savage** on +44 (0)20 7375 4368 or emailing csavage@fc-gi.com

Reserve your place today - 1-800 814 3459 ext 7185

SECURE YOUR PLACE TODAY FOR THE NGV EVENT OF 2015!

PASS PRICES – SEE HOW MUCH YOU SAVE BY BOOKING EARLY

Pass Type	EARLY BIRD Expires 24/04/15	LAST CHANCE Expires 22/05/15	FULL PRICE
Business Pass <ul style="list-style-type: none"> • Full two day access to the NGV conference • Access to all presentation speaker presentation slides • Access to all event recordings including presentations and Q&A sessions • Access to online networking centre pre and post conference • Full Access to all networking drinks on pre-conference day and day 1 • Exclusive access to delegate list 2 weeks before the conference • Full event de-brief following event with key takeaways to maximize your networking time • Free Wi-Fi throughout the conference venue 	\$1595	\$1795	\$1895
Basic Pass <ul style="list-style-type: none"> • Full two day access to the NGV conference • Access to all presentation speaker presentation slides • Full Access to all networking drinks on pre-conference day and day 1 • Free Wi-Fi throughout the conference venue 	\$1495	\$1595	\$1695
Fleet Pass <ul style="list-style-type: none"> • Full two day access to the NGV conference • Access to all presentation speaker presentation slides • Access to all event recordings including presentations and Q&A sessions • Full Access to all networking drinks on pre-conference day and day 1 • Free Wi-Fi throughout the conference venue <p>This pass is only available to those managing public or private fleets that use or are looking to use natural gas fuels in their vehicles. This is not available to sales/ business development/ consultancy staff. Please note that any pass not fitting the criteria will be automatically upgraded to a basic pass. FC Gas Intelligence reserves the right to review and approve any requests for this pass</p>	\$395	\$495	\$595

5 EASY WAYS TO REGISTER

ONLINE

Secure & simple registration online at www.ngvevent.com

EMAIL

osaunders@fc-bi.com Just give us your details and pass type – we'll do the rest!

CALL

FC Business Intelligence team on 1-800 814 3459 ext 7227

Cancellation Policy

Places are transferable without any charge. Cancellations before April 24, 2015 incur an administrative charge of 25%. If you cancel your registration after April 24, 2015 we will be obliged to charge you the full fee. NB - you must notify FC Business Intelligence in writing of a cancellation, or we will be obliged to charge you the full fee. The organisers reserve the right to make changes to the programme without notice. All prices displayed are exclusive of VAT unless otherwise stated but, VAT will be charged, where applicable, at the prevailing rate on the invoice date and the relevant details will appear on the invoice. FC Business Intelligence takes every care to ensure that prices quoted are correct at time of publishing however, bookings will only be accepted if there is no material error in the price advertised on the website.

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