



BEYOND OIL
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Propel™ Fueling Change.

Propel builds, owns and operates a network of alt-fuel access points.

Mission: Empower consumers by offering real fuel choices. Create markets for emerging clean fuel products.

Consumer participation is the critical factor to understanding investment and policy decisions as we move to solutions.



Where is the American consumer in all this? Disenfranchised!

Desire change

BUT...

No purchasing “vote”
and are essentially
forced to use petroleum
products.



How can the American consumer participate in change, today?



- ✓ Leverage Installed Vehicle Base:
14 million diesel vehicles (Biodiesel)
9 million Flex Fuel vehicles (Ethanol)
- ✓ Empower Consumers with Choice
- ✓ Create Markets
New fuels & Vehicles
Carbon Markets

Evolution of Transportation

Today: 98% petroleum dependent

- Ethanol: gasoline replacement, 1st gen technology
- Biodiesel: diesel replacement: 1st gen technology
- CNG: fossil fuel, limited supply (non-renewable alt fuel)
- Electric car: Late pilot phase (5 years?)
- Hydrogen car: Very early pilot phase (10-20 years?)

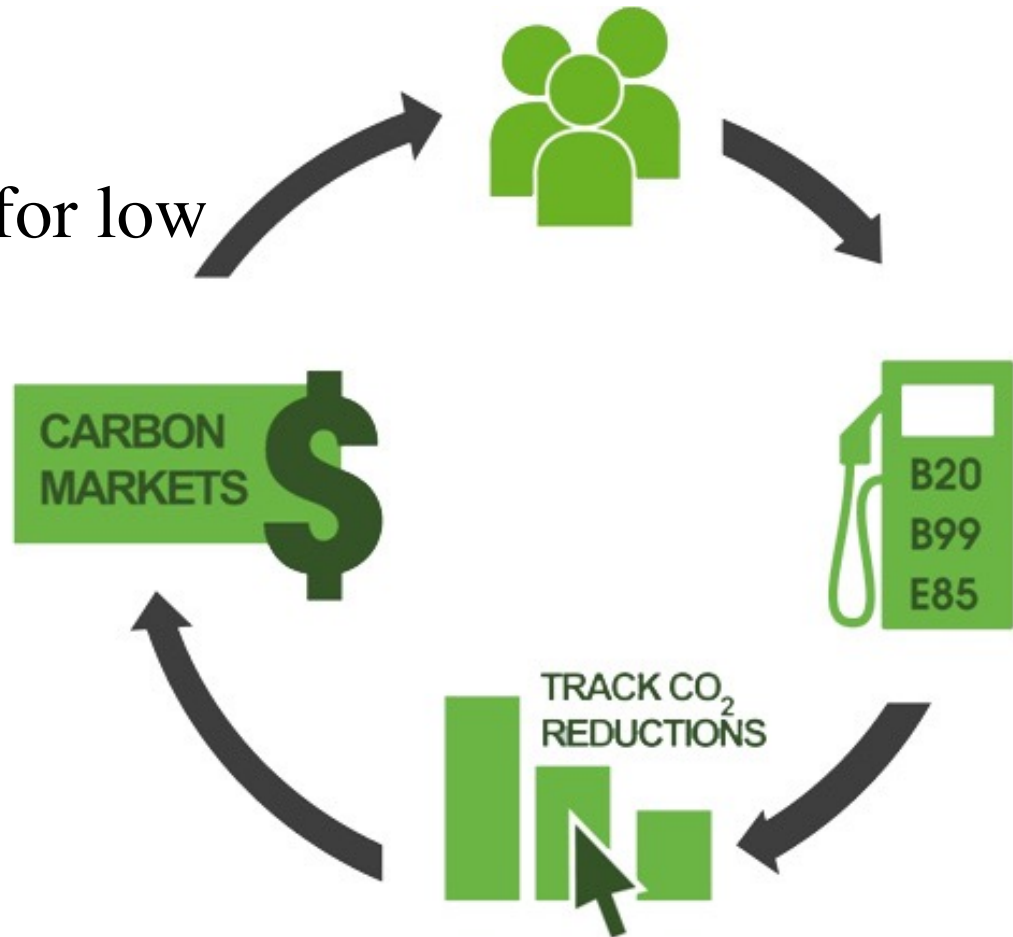
Tomorrow: Beyond Oil

- Technologies integrate
- More efficient biofuels, new technologies & feedstocks
- Electric and Hybrid vehicles
- Carbon tax and policy incentive environment (picking winners)

Connecting Consumers to CO₂ Markets

Carbon Markets are emerging...

The Future:
Monetizing markets for low
carbon customers.



NW Action Items?

The Right Policies

Follow CA and AB118

Participate in markets become a customer

Support Practical Solutions

Balance R&D with Market Development

Perception and Evangelism

Educate, Iterate and Evolve

