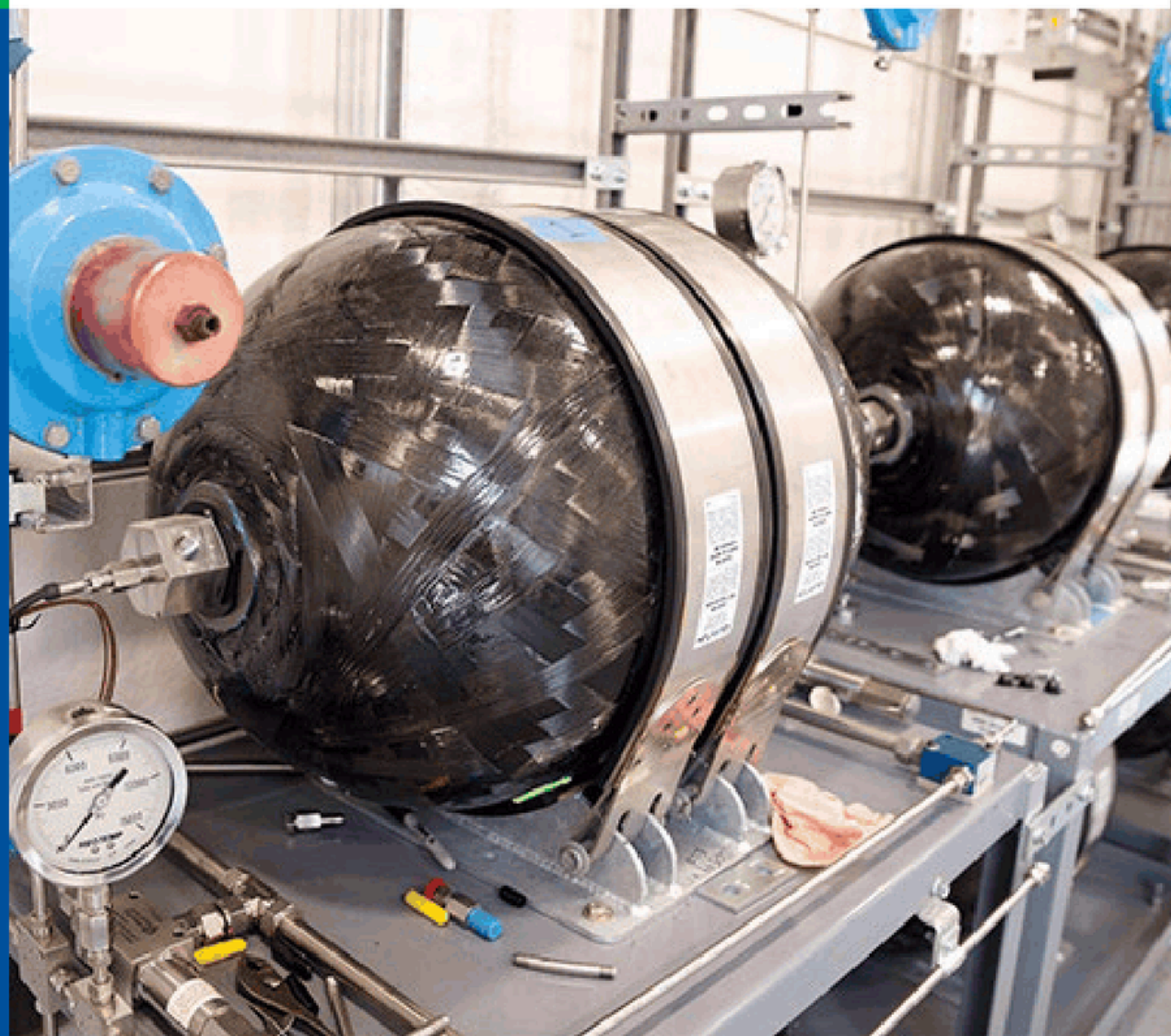




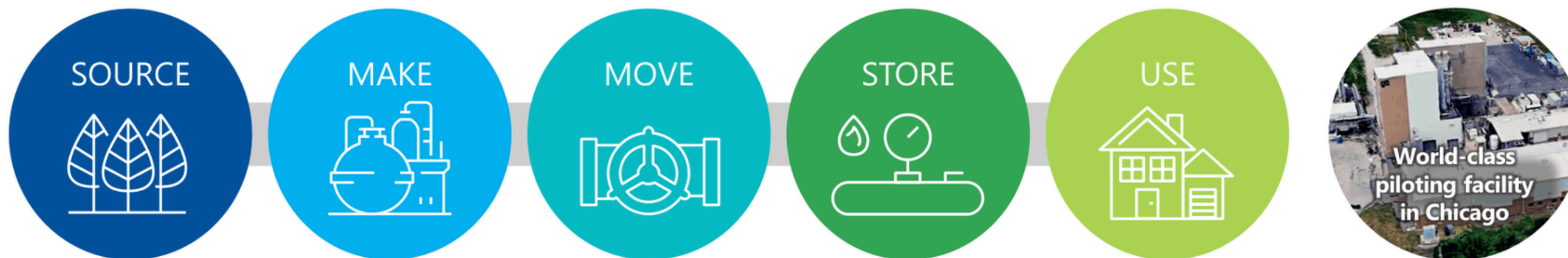
RNG and H2: What's New?



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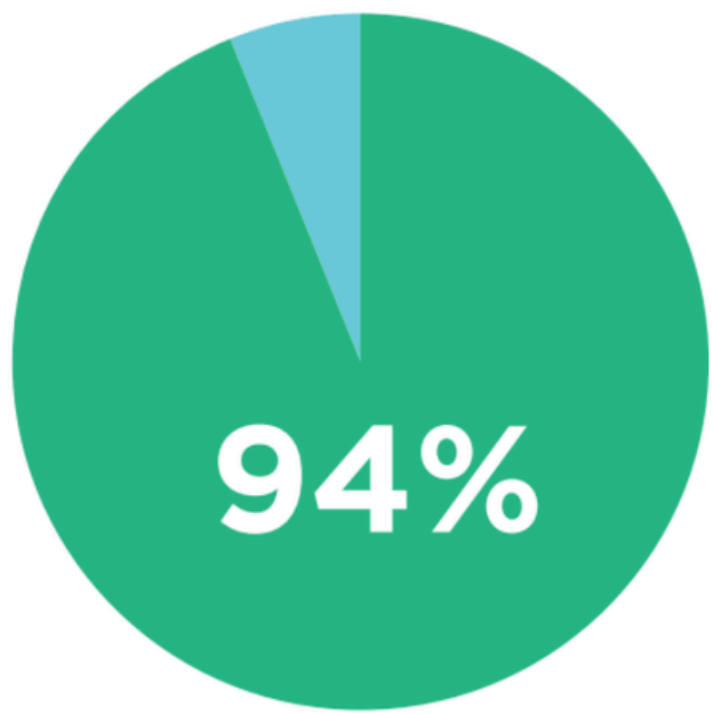
RNG Growth

2025 NGV Fuel Use

806 Million GGE Total

In 2025, **94%** of all on-road fuel used in natural gas vehicles was RNG.

- Conventional Natural Gas
51 Million GGE
- Renewable Natural Gas
755 Million GGE

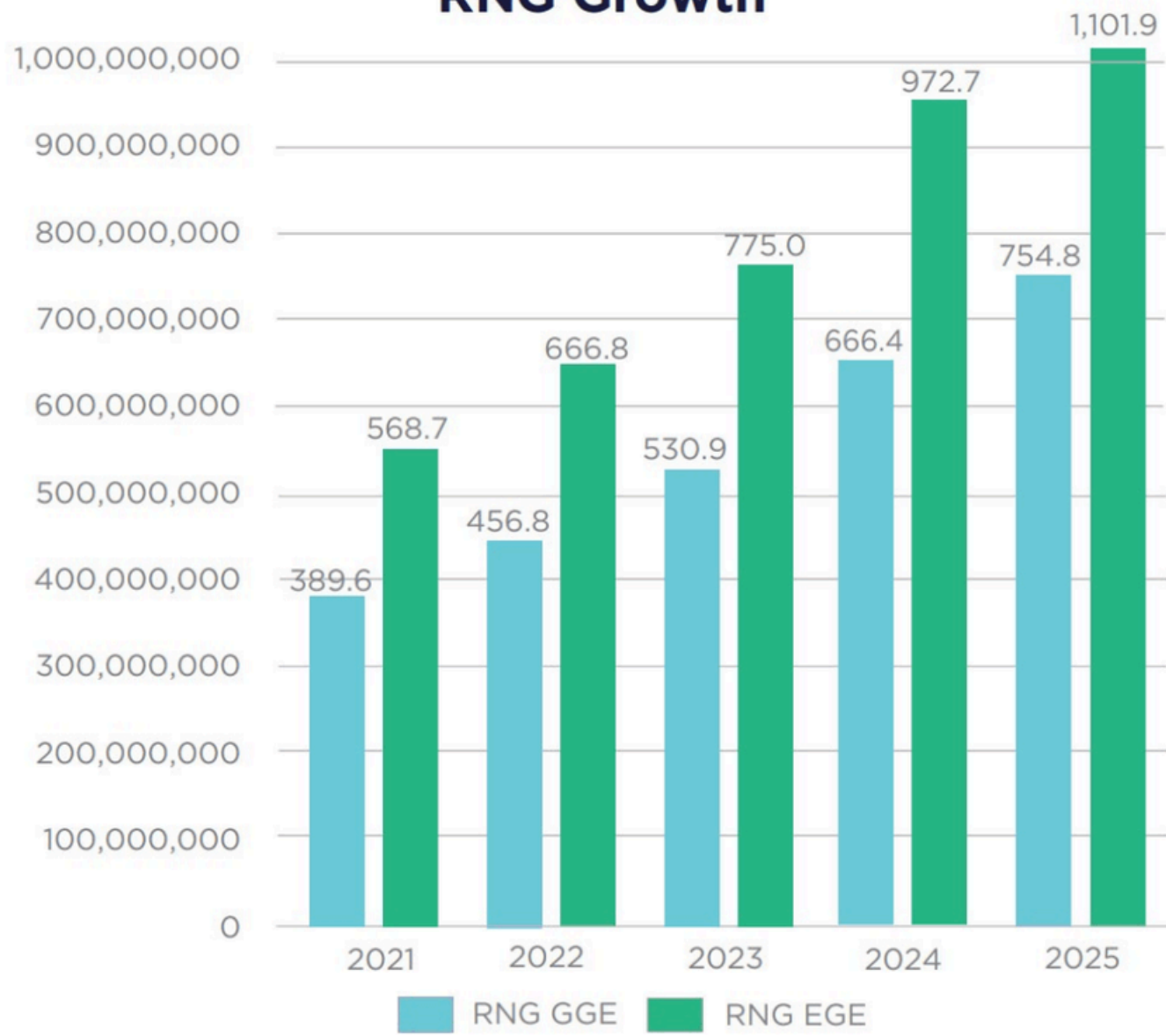


RNG Production Facilities



Note: RNG Coalition (U.S. and Canada Year End 2025)

RNG Growth

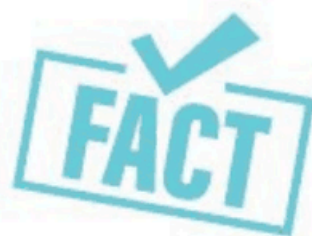


~15% YoY

94% in 5 years

RNG – Decarbonization Tool

The only motor fuel with negative carbon intensity



Fuel Up on Fact:

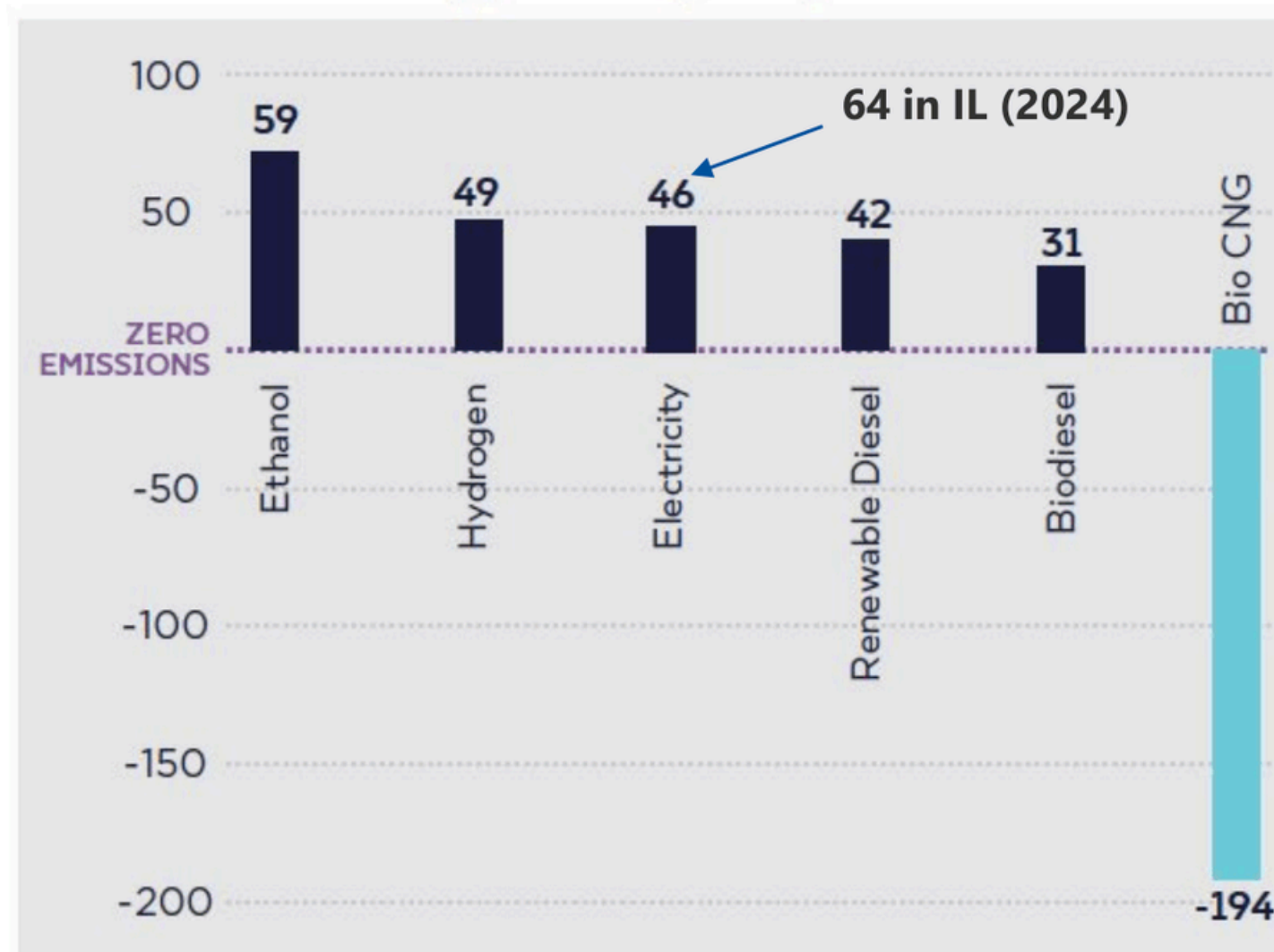
At -194.13, bio-CNG holds the lowest average carbon intensity of any clean fuel option on California's roadways today and is the only fuel with a negative carbon intensity

Note: Data from CARB LCFS Reporting Tool Quarterly Summaries (calculated weighted average)



Source: The Transport Project

CA LCFS 2024 Renewable Fuels Average CI Score (gCO₂e/MJ)



Note: Baseline conventional diesel carbon intensity = 100.45.
Data from CARB's LCFS Reporting Tool Quarterly Summaries
Bio-LNG not listed as bio-CNG accounts for more than 94 percent of all RNG used in on-road vehicles

RNG – Fleet Success Stories

CNG/RNG is the fuel of choice for fleets looking to make a sustainability impact at scale today

Amazon

- 4,400+ CNG vehicles, 39 Million GGE (5 BCF)
- 46+ stations with Clean Energy

PepsiCo / FritoLay

- Class 8 Fleet is over 700 CNG trucks (~50%)

UPS

- Over 20 Million GGE per year (2.5 BCF)
- 6,000+ CNG trucks – \$450M investment

Waste Management

- 14,000+ CNG vehicles
- 260 stations, adding ~5-8 RNG facilities/year

J.B. Hunt (200+ trucks), **U.S Foods** (90 trucks),

Paper Transport (160 trucks), and more...



Clean Energy RNG station. Multiple public fast-fill dispensers and 89 private time-fill posts

RNG – Fleet Success Stories



"65% of the fleet that goes out every day is in a natural gas tractor" - UPS



"We're expecting a 2 to 2.5 year ROI on CNG" - Wegmans

"76% of HD fleet operations are CNG or EV" – Wegmans (197 CNG trucks)



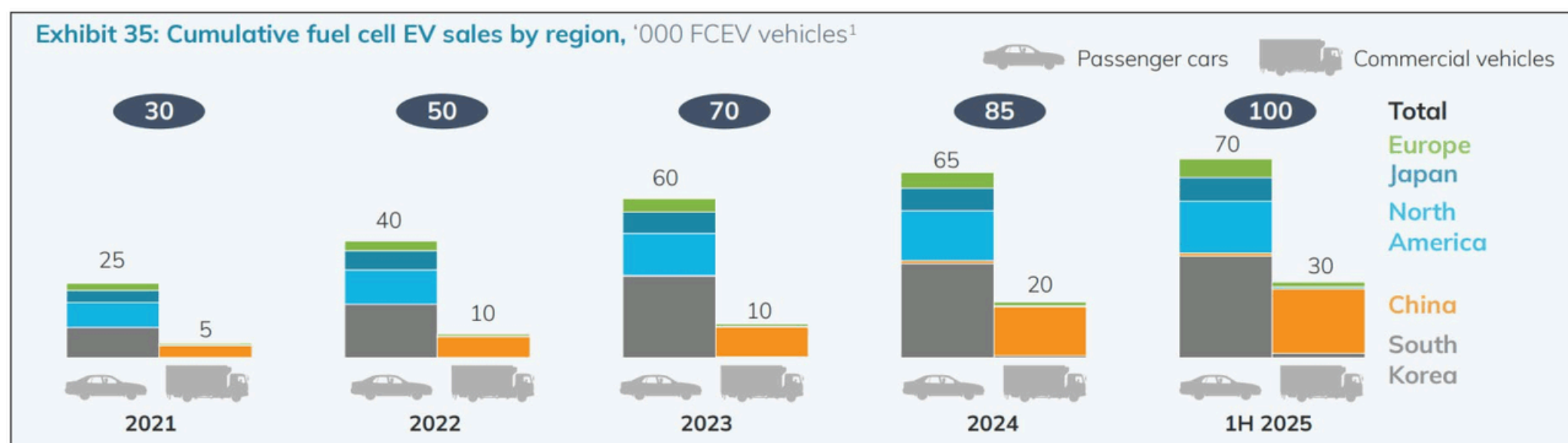
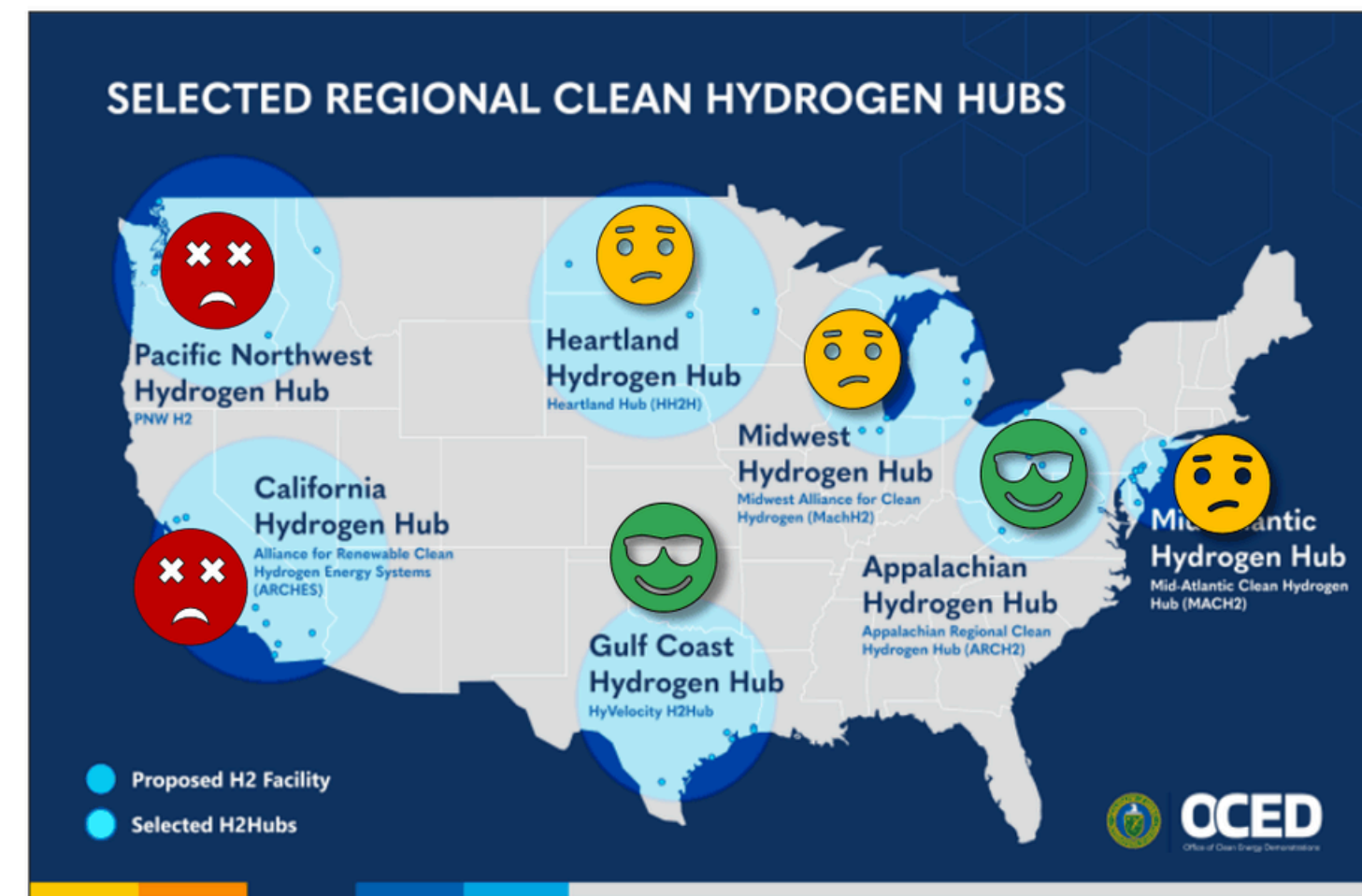
**"CNG/RNG works for most duty cycles"
"Leaning heavily into CNG in the next 2-4 years"
"EVs for last mile, where they makes sense"**

– John Smith, CEO

Hydrogen Hubs

U.S. DOE Hubs

- CA and PNW cancelled
- DOE re-engaged after a year of stall
- Unclear if DOE will intend to advance to Ph2 – Design
- 45V tax credit is less favorable than expected
- Hub members are reconsidering capital investments



Source: McKinsey Q3 2025

Global hydrogen demand/mobility

- Ammonia and refining account for 70% of demand
- Mobility demand is a small fraction (~2%)
- China is leading the HD vehicle adoption
- South Korea is leading passenger vehicle adoption, followed by North America



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Thank you!

