



Developing customer-oriented CNG supply

NGV 2011, Berlin
9 June 2011

Customers

Vehicle categories

Small
passenger
cars



Light-duty
vehicles



Minivans



Sedan cars,
station wagons



Transporters,
delivery vans



Buses,
heavy-duty
vehicles



Focus:
nationwide CNG network

CNG filling:
specific
solutions

CNG infrastructure in Germany

What do customers want?

Filling
time

Opening
hours

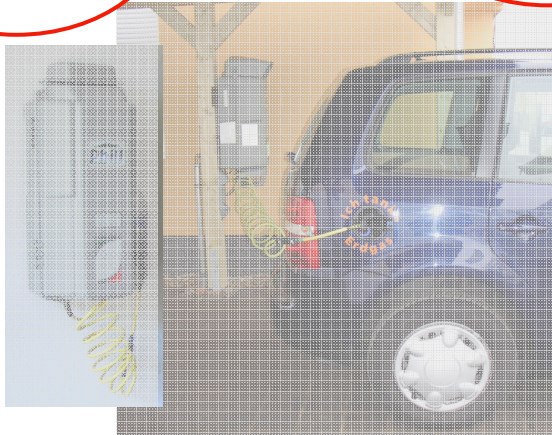
Nationwide
network

Billing

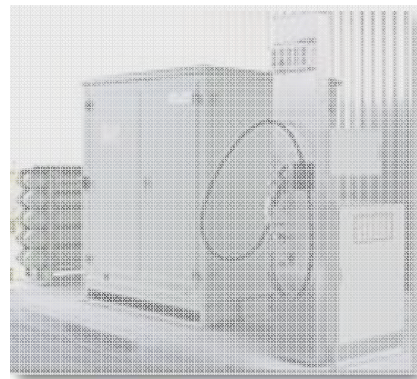
Fuel
price

Shop

Economics



Home filling



Depot station



Public petrol station

Development of CNG infrastructure initiated by German gas industry in 2002 (erdgas mobil)

Aim: nationwide CNG infrastructure

Fuelling station distances

- Urban areas approx. 5 km
- Mixed areas approx. 10-15 km
- Rural areas approx. 20-25 km

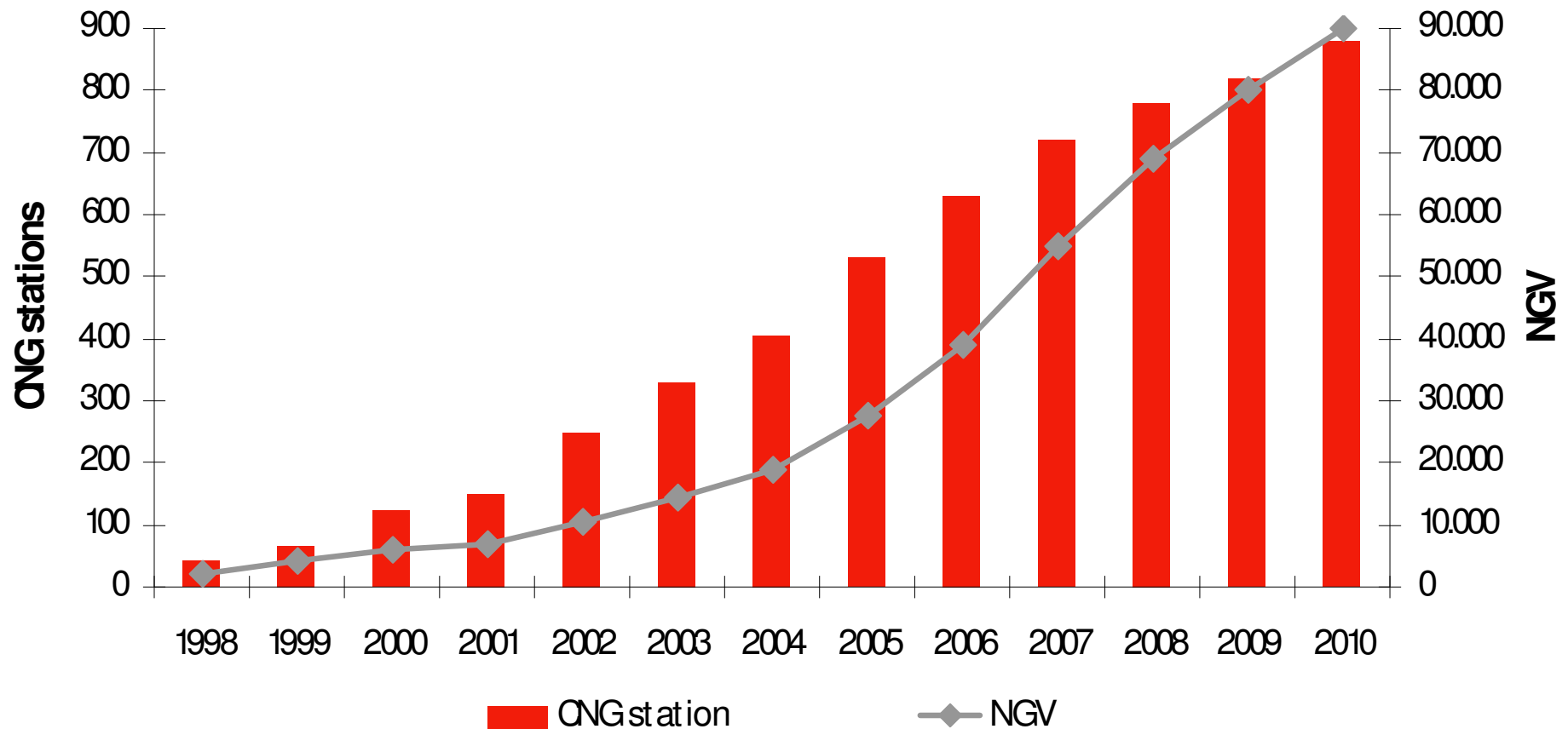
1,000
CNG fuelling stations

Tasks of erdgas mobil

- Technical fuelling station standardisation
 - Cost reduction
 - Modular concepts
- Lead company for the construction of CNG stations at public service stations
- Standard agreements between gas and oil companies

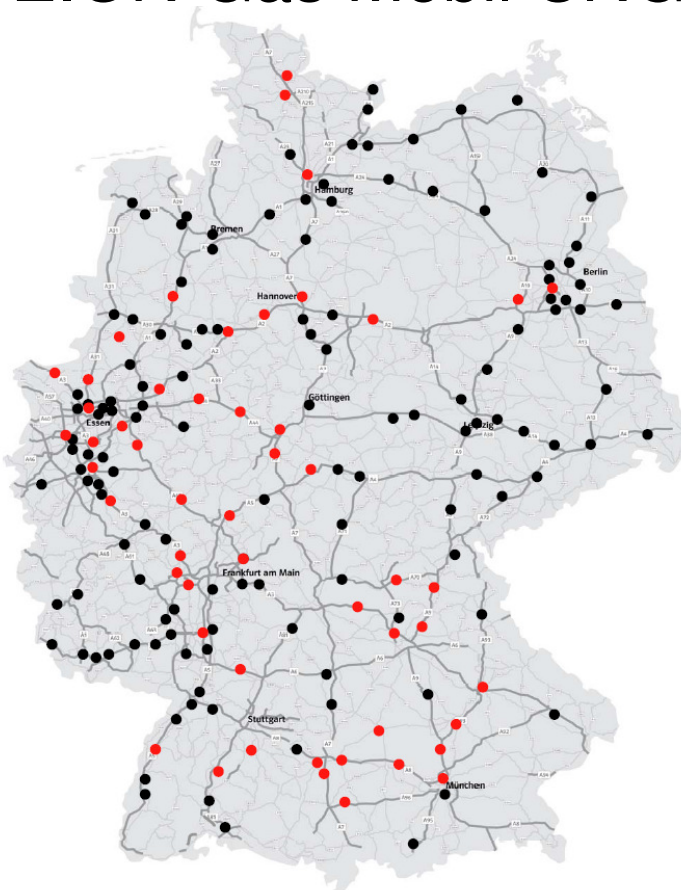


Trend in CNG infrastructure in Germany



Data for beginning of year

E.ON Gas Mobil CNG infrastructure - status quo

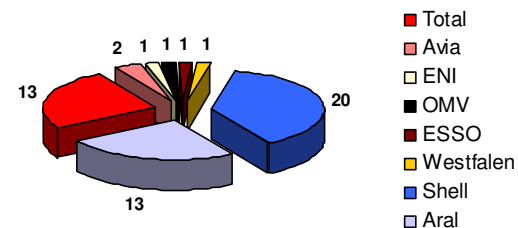


● E.ON Gas Mobil locations ● other locations near autobahns

More than 150 natural gas fuelling stations near German autobahns today

53 of which operated by E.ON Gas Mobil

By oil companies

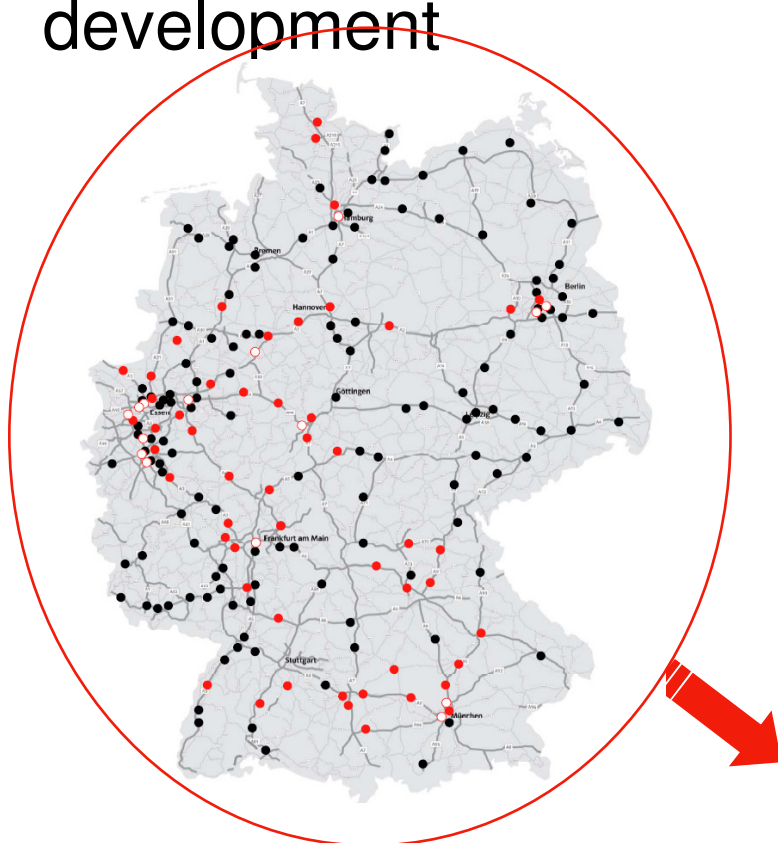


Distances to German autobahns

< 0.5 km: 29 locations
 0.5 – 1 km: 12 locations
 1 – 2 km: 7 locations
 2 – 5 km: 2 locations
 > 5 km: 3 locations

E.ON Gas Mobil actively contributes to increasing the number of fuelling stations throughout Germany

E.ON Gas Mobil CNG infrastructure – future development



- Currently, 15 locations being implemented
- A total of 68 natural gas fuelling stations to be installed and operated by the end of 2011
- Approx. 25 new stations to be built in 2011

○ To be completed by the autumn of 2011

Expansion of infrastructure being actively pursued in line with the criteria specified

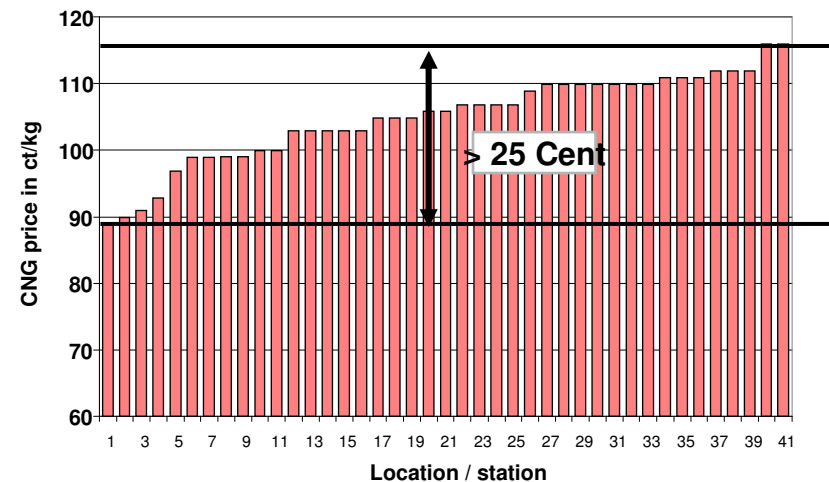
CNG Pricing in Germany

- CNG prices differ significantly throughout Germany
- Price differentials vs. diesel vary over long term

Pricing - a challenge

- Consistent market observation
- Systematic pricing
- Prices to be accepted on the market
- Review at least once a month
- Customer retention not via price
- ...

Regional CNG pricing (May 2011)



- Transparent pricing as a reliable investment basis for customers
- Professional pricing as a means to signal reliability

Communication

- Signs on trunk roads
- Information on the Internet



www.erdgas-mobil.de

www.gas24.de

www.gibgas.de

- Information about fuelling station locations / navigation

Website von ise solutions ▶ Gas Tanken (CNG-Edition) Support ▶
V2.4 nun im AppStore :



- CNG price communication



Marketing

- No uniform / consistent identity
- No recognisable brand so far
- Insufficient CNG fuelling station advertising

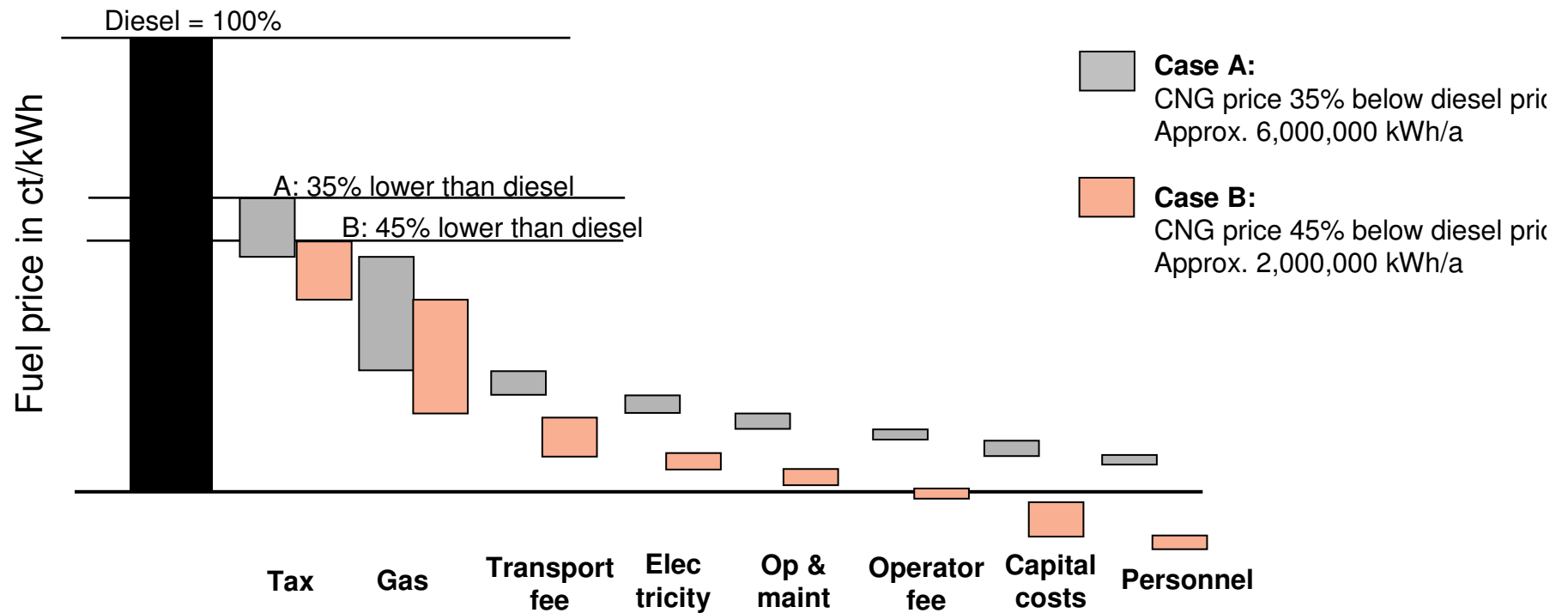
Quite some
catching-up
to do



- Support uniform identity, recognition

E.ON not pursuing its own company brand, but supporting a general natural gas brand

Economic aspects from operator's viewpoint



Economically viable operation only possible within positive framework

Conclusions

- The basic infrastructure for natural gas as a motor fuel exists in Germany.
 - The CNG fuelling station infrastructure is well developed in Germany compared with other European countries.
 - A CNG infrastructure considered satisfactory by customers requires more commitment by the gas industry and professional market handling.
 - Further expansion of the CNG fuelling station infrastructure is required to firmly establish natural gas as a motor fuel on the market.
 - It is essential to establish as soon as possible that CNG fuelling stations can be operated in an economically viable manner.
- E.ON will continue to pursue its commitment to expanding the CNG infrastructure in Germany.**