Future Prices & Availability of Existing Infrastructure: What's Next?

March 11, 2025

MESSY MIDDLE BOOTCAMP

RUN ON LESS MESSY MIDDLE

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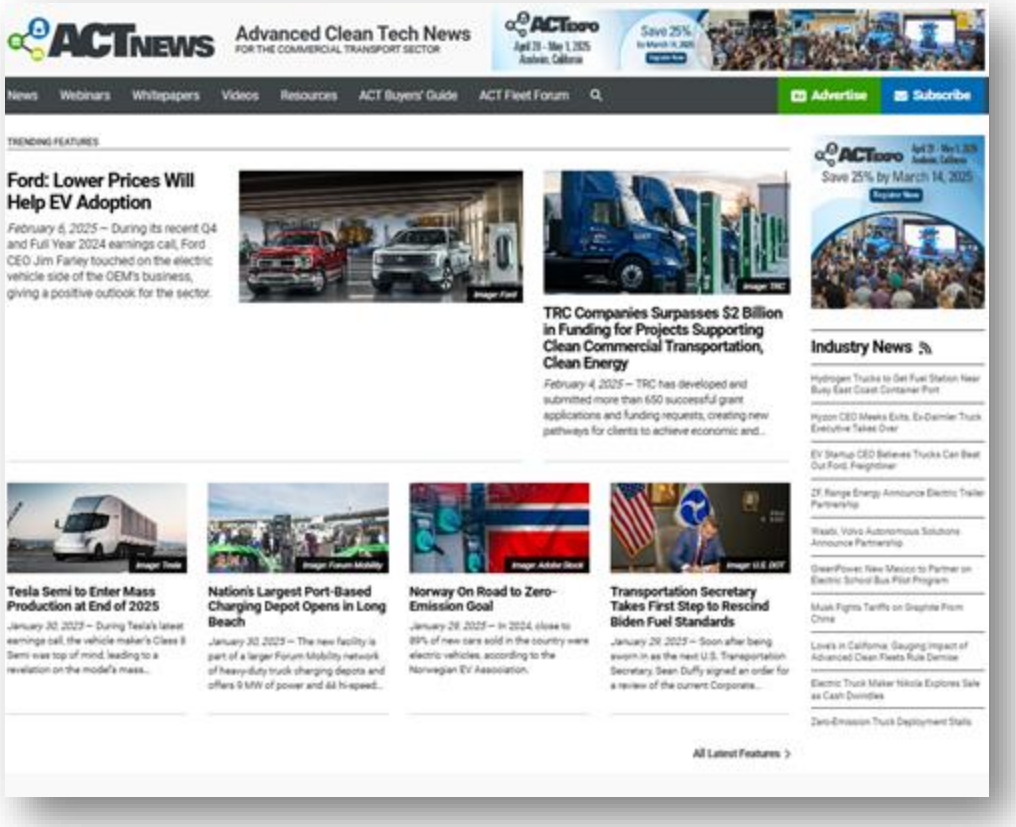

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Messy Middle Bootcamp Series

Diesel Drop-In Alternatives: Ultra-Low Sulfur, Bio-, and Renewable (February 11th) ✓

Decarbonizing with Natural Gas (February 25th) ✓

Future Prices & Availability of Existing Infrastructure: What's Next? (March 11th)

DIESEL AND NATURAL GAS WORKSHOP (March 25th)

The Current State of HD BEV: Technologies and Capabilities (April 8th)

Strategizing Successful HD BEV Adoption (April 27th)

Charging Depots, Networks & the Economics of Fleet (May 6th)

HD BEV WORKSHOP (May 20th)

The Production Processes of Hydrogen Fuel (June 3rd)

Moving Hydrogen from Here to There: The Distribution and Storage of Hydrogen Fuel (June 17th)

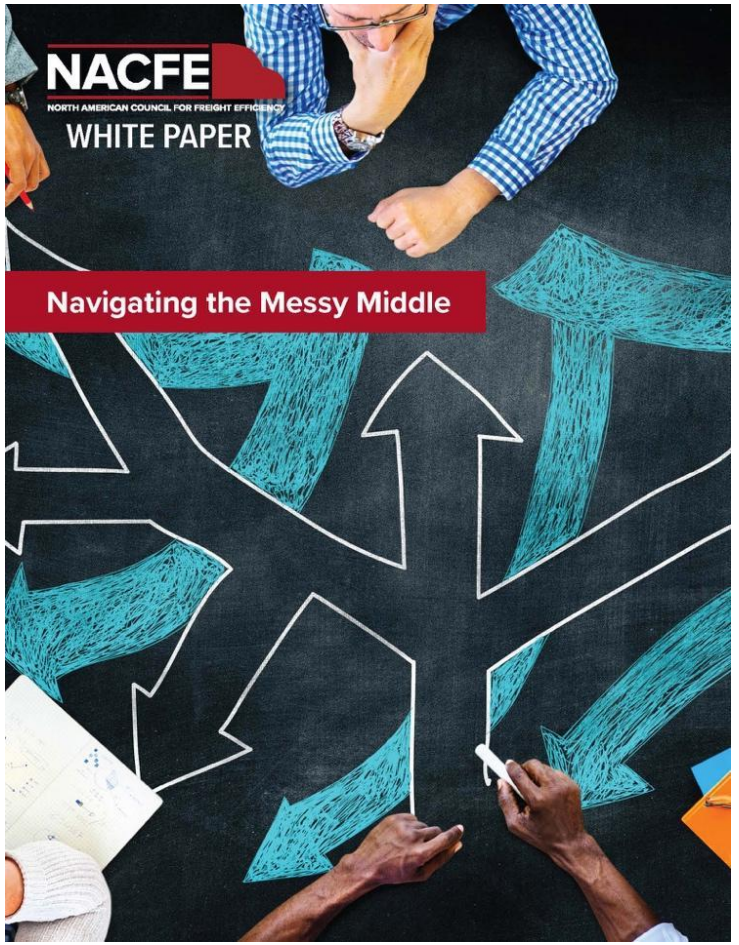
The Opportunities and Challenges of Selling Hydrogen to the Industry (July 1st)

HYDROGEN FUEL CELL WORKSHOP (July 15th)

2023 Bootcamp is still available at: https://runonless.com/electric-depot/

Run on Less – Messy Middle

- Deeper dive into the term "Messy Middle"
- Decision-making process framework included
- Builds from 2023 Thought Leadership Report *The Messy Middle: A Time for Action*



Access White Paper Here

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2025 Messy Middle Fleets

Update from The Run Planning…

Follow the Fleets, Drivers, providers, and more on:

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Quiz for Today's Session

Completing Today's Quiz:

- Go to runonless.com and click back into the session
- Click 'Take Quiz' button
- Create username and password to keep track of your progress
- Provide your name and email to enter a drawing for a Run on Less - Messy Middle swag bag

What You Should Know

Q&A

Submit your questions to the host using the Q&A box in the upper right-hand corner

Recording

A recording of today's webinar will be available on runonless.com

Technical Issues

Contact Stephane Babcock at

sbabcock@trccompanies.com

Today's Bootcamp Speakers

Future Prices & Availability of Existing Infrastructure: What's Next?

Ryan Bankerd
Global Director of Automotive Sustainability
UPS

Jerome McCarville
Manager, National Accounts
Chevron Renewable Energy Group

Nik Pavlenko
Programs Director, Fuels and Aviation
International Council on Clean Transportation (ICCT)

Derek Turbide
Vice President of Renewable Natural Gas Solutions for Trucks & Buses
Clean Energy Fuels

RUN ON LESS MESSY MIDDLE

MESSY MIDDLE BOOTCAMP

Navigating the Messy Middle: Life-Cycle Assessment of Alternative Fuels

Nikita Pavlenko

Aviation & Fuel Program Director, ICCT

March 2025

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Many metrics to assess the technology performance

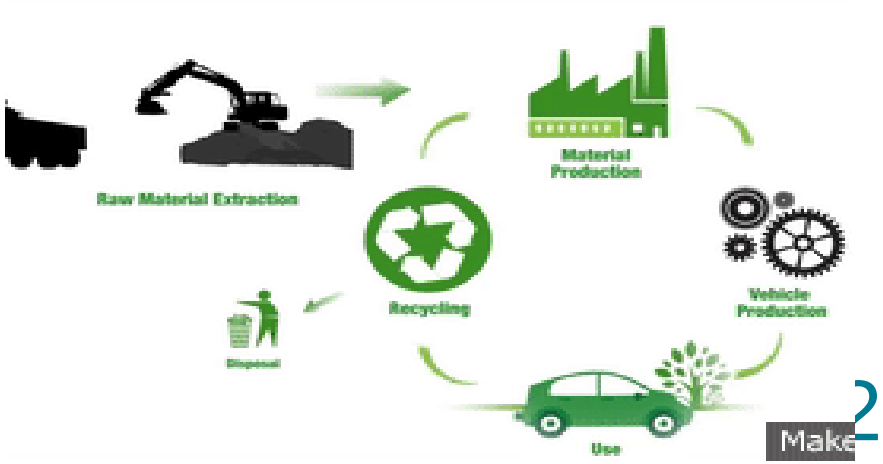
Fuel economy

Total cost of ownership

Driving range

Tailpipe CO_2 emissions

Life-cycle GHG emissions



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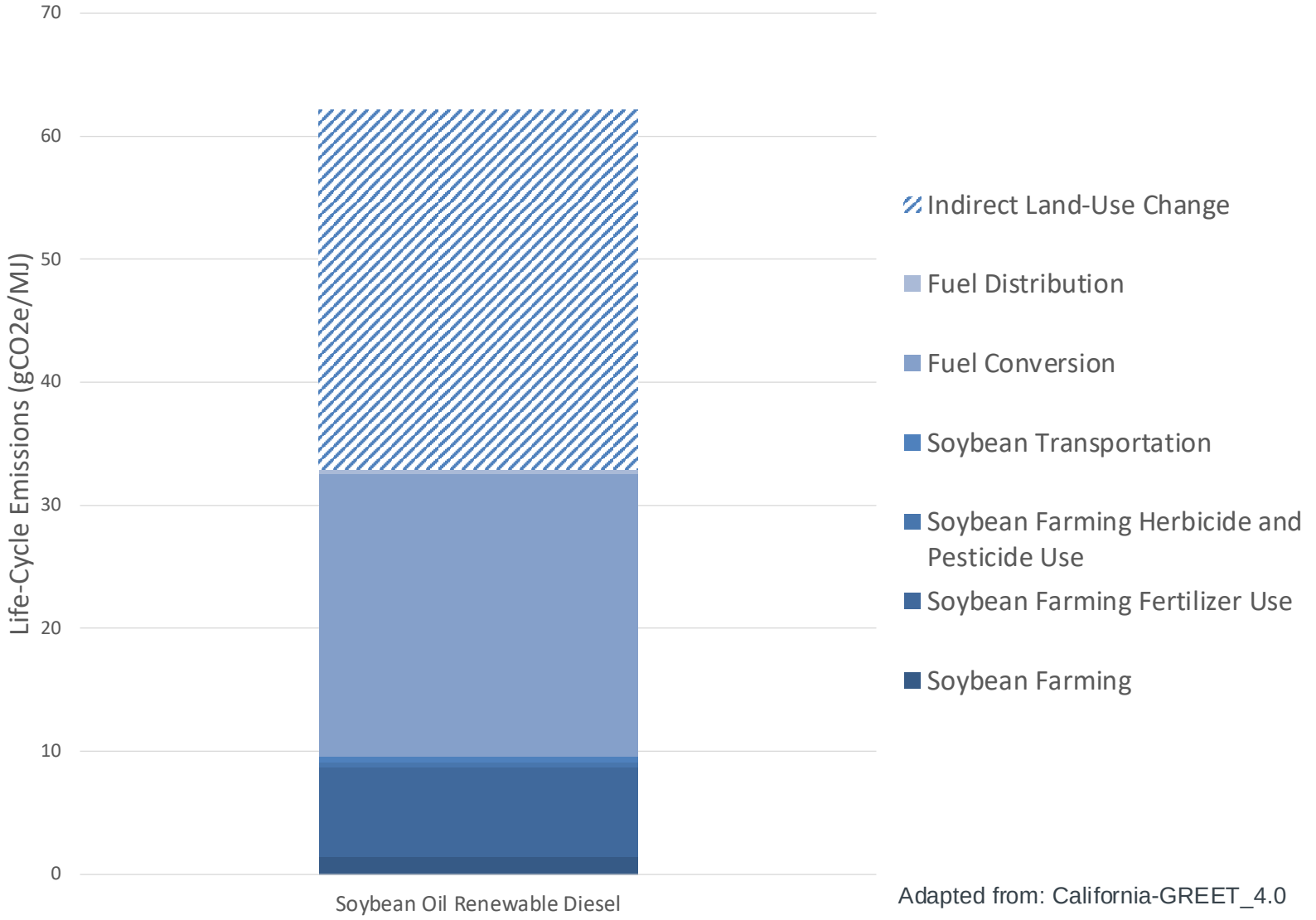
Upstream Emissions from Fuel Production

- Upstream emissions
- Fuels with zero tailpipe emissions can have significant upstream emissions (e.g., electricity, hydrogen)
- Land-use change can contribute significantly to upstream impacts of fuels produced using dedicated cropland



Adapted from: California-GREET_4.0

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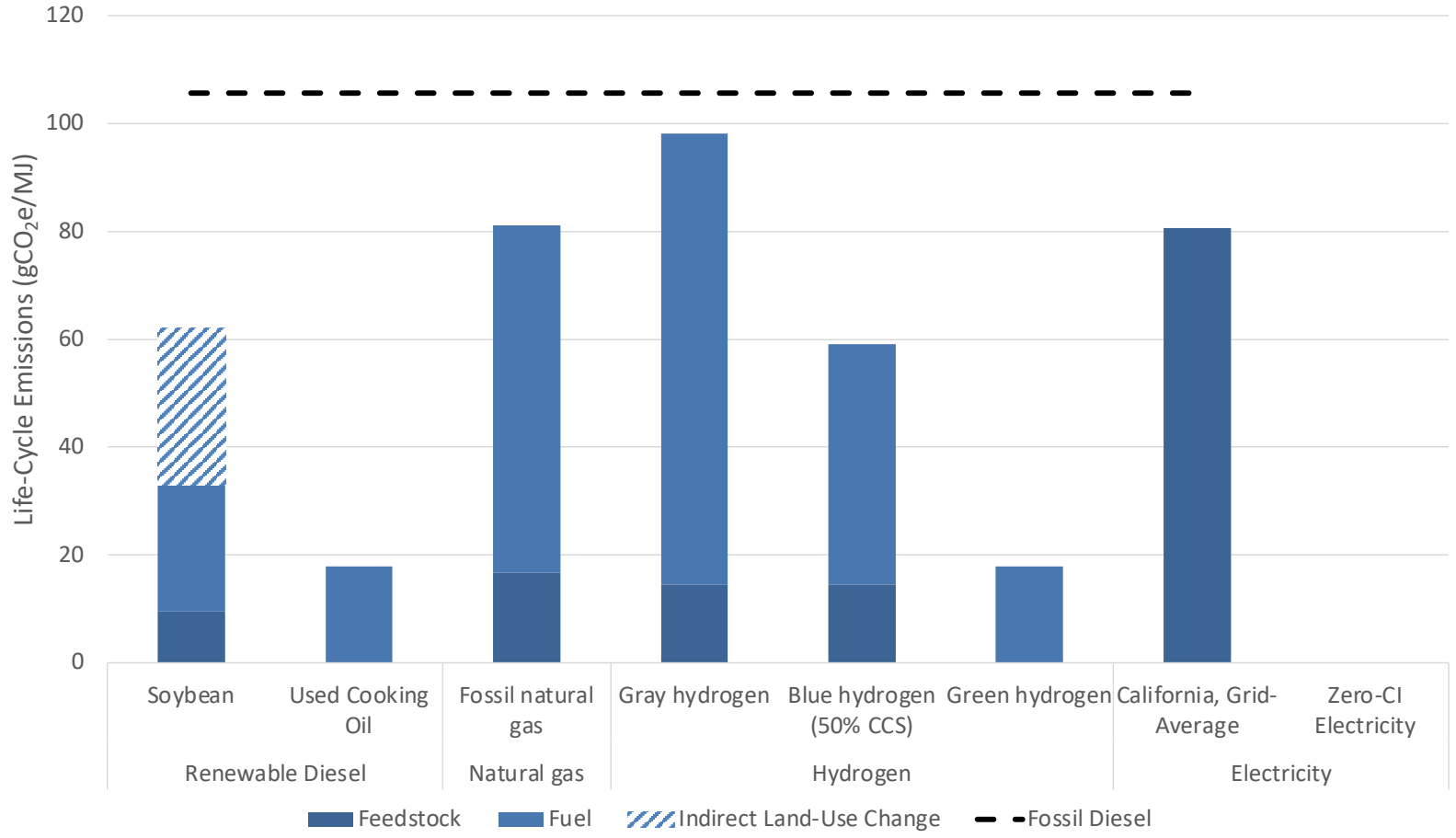
Comparison of Upstream Emissions Across Pathways

- LCA of alternative fuels can vary considerably
- Wastes & residues + renewable electricity tend to offer deepest GHG savings
- Upstream methane leakage may undercut GHG savings from natural gas pathways



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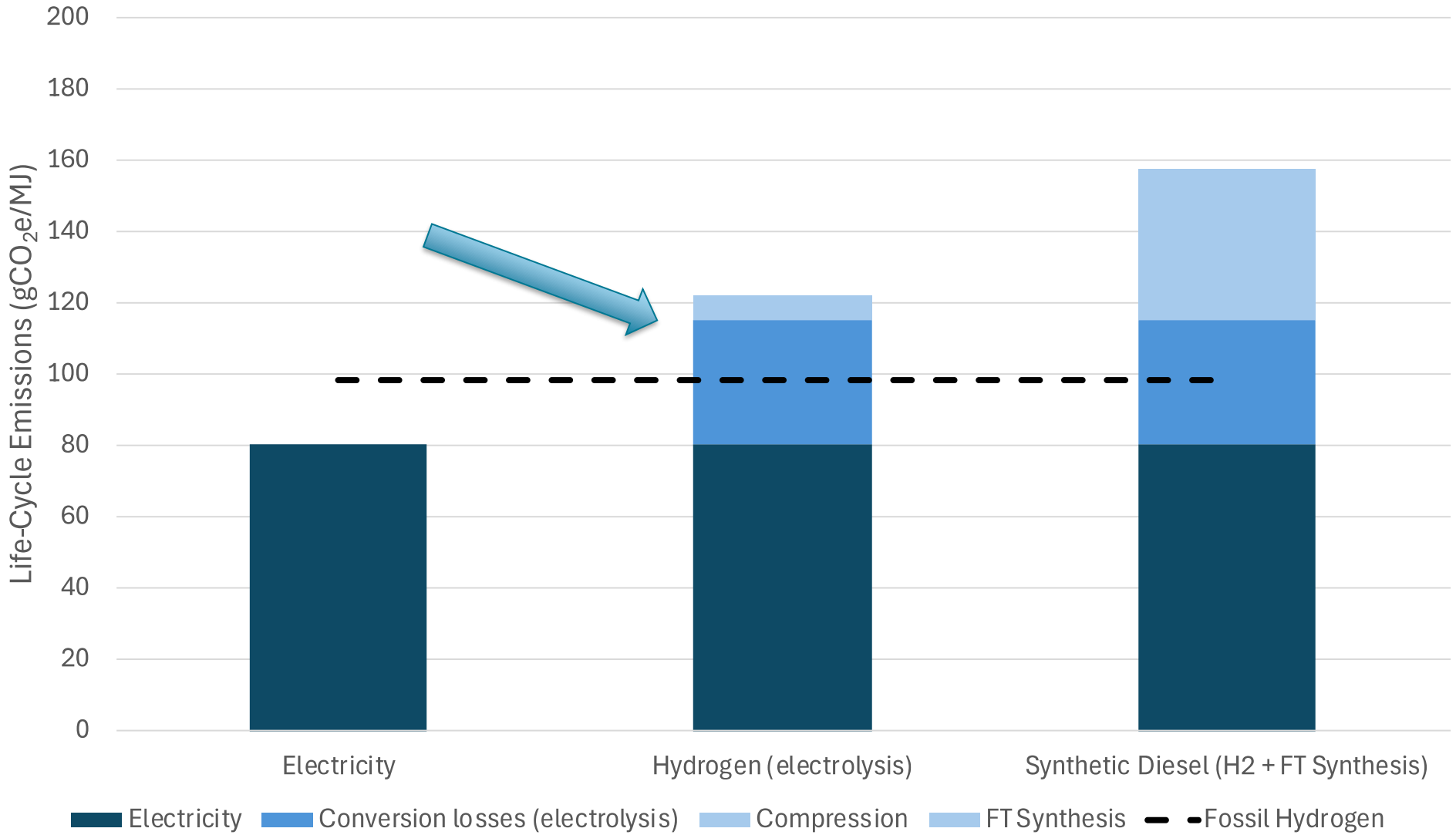
Efficiency Losses Compound for Hydrogen-Derivatives



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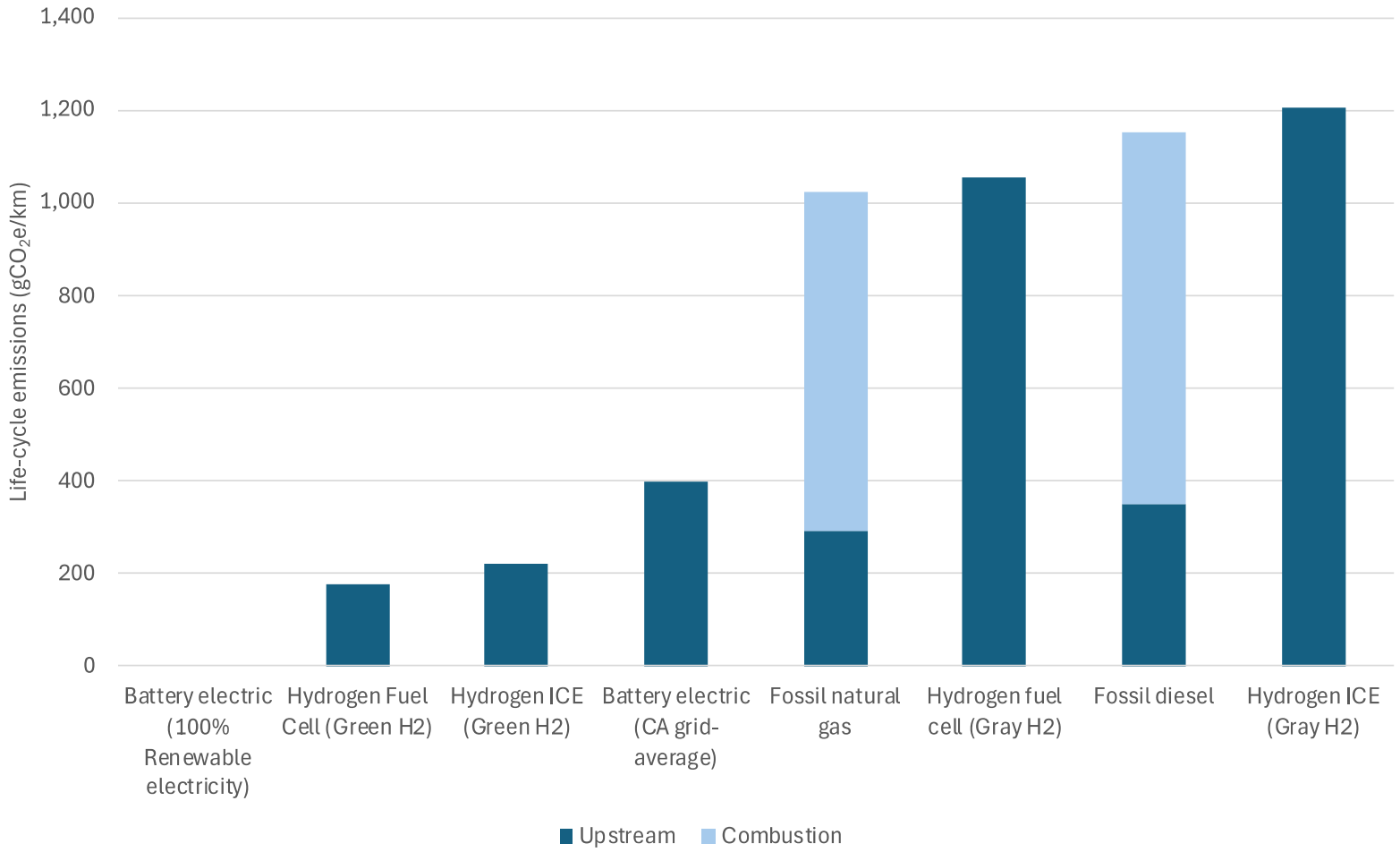
Putting it All Together: Emissions in the Fuel-Vehicle Cycle

- All hydrogen-powered trucks have the potential to significantly reduce GHG emissions if powered by green H_2
- If powered by grey H_2, their life cycle emissions can be worse than diesel trucks.



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Questions?
N.Pavlenko@theicct.org

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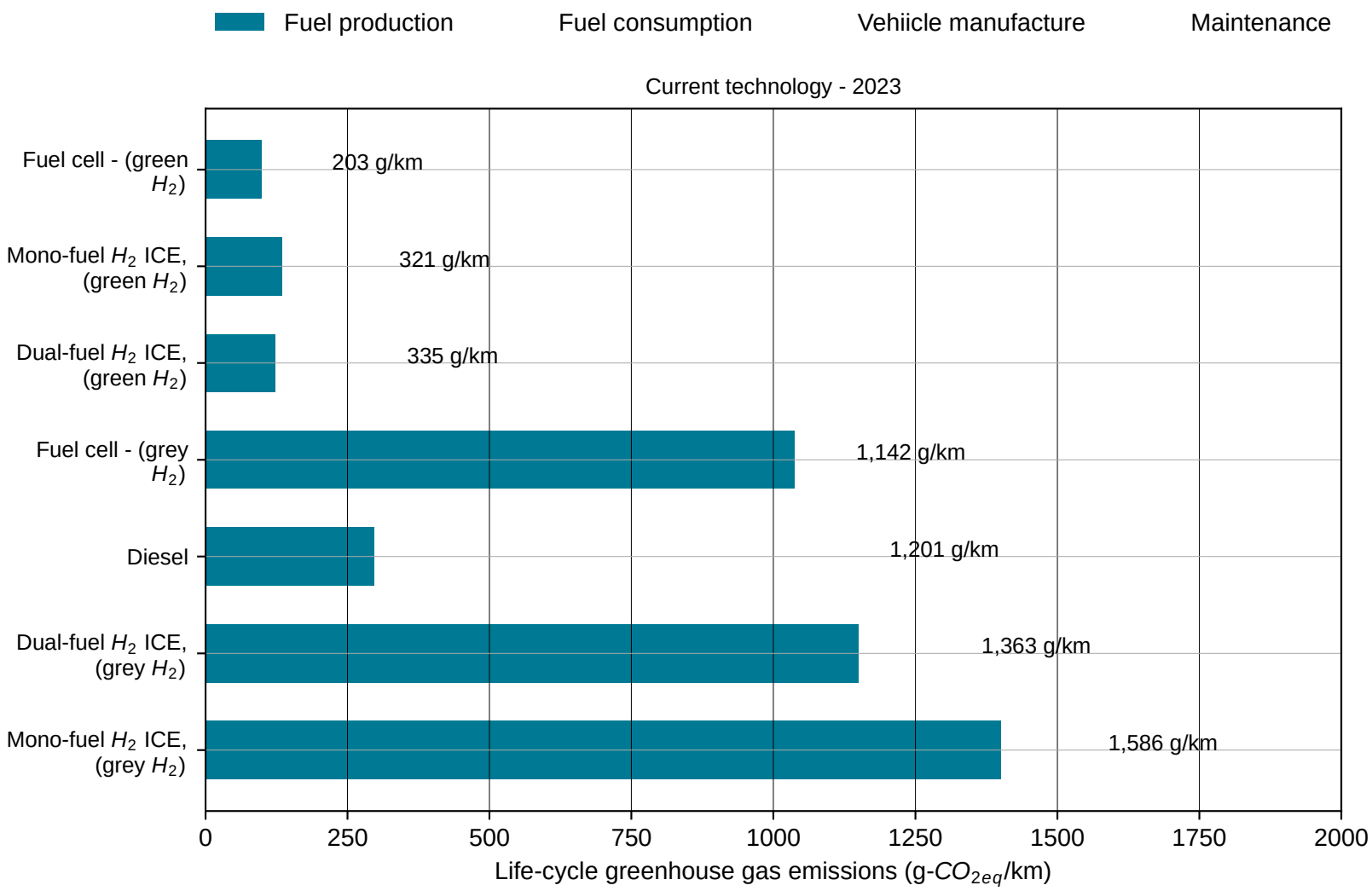
Appendix Slides

Putting it All Together: Emissions in the Fuel-Vehicle Cycle

- All hydrogen-powered trucks have the potential to reduce GHG emissions if powered by green H_2 (~ 80%) .
- If powered by grey H_2, their life cycle emissions can be worse than diesel trucks.



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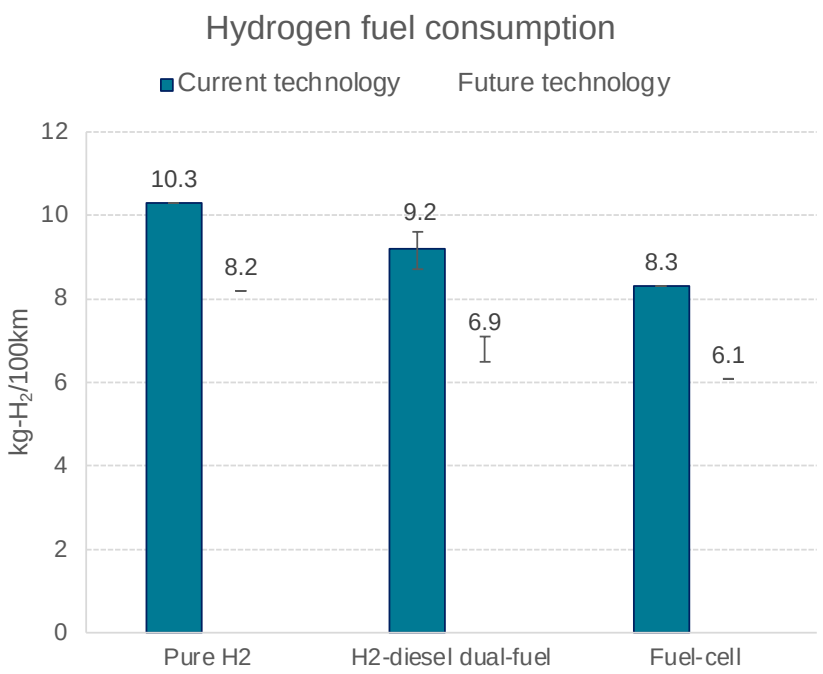
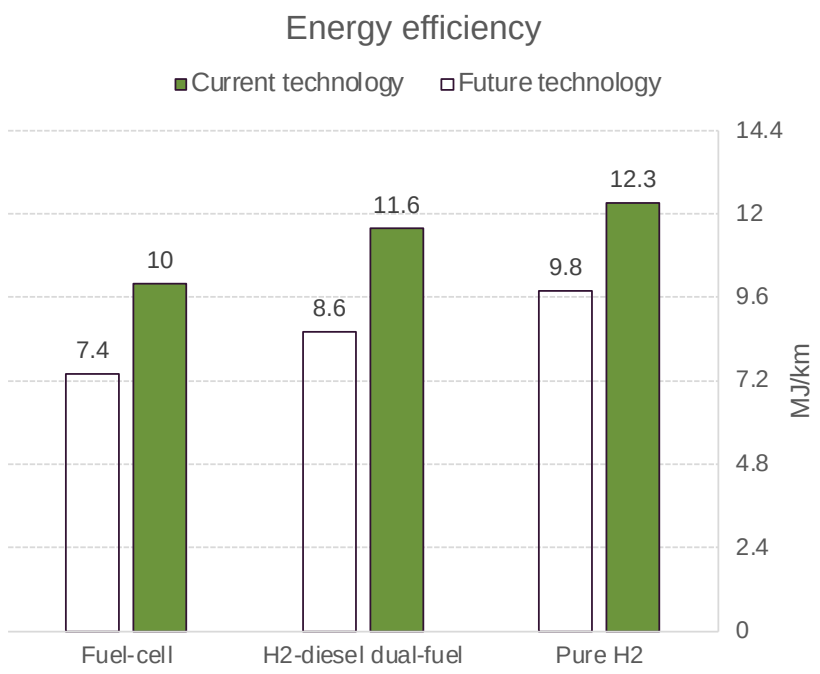
Fuel economy and energy efficiency

- Some powertrain + fuel combinations have different efficiencies
- We can normalize based on efficiency to develop a consistent functional unit (e.g., gCO_2e/km)





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Renewable Fuels Touchpoint

NACFE
Run on Less - Messy Middle
March 11, 2025

Jerome McCarville
Chevron

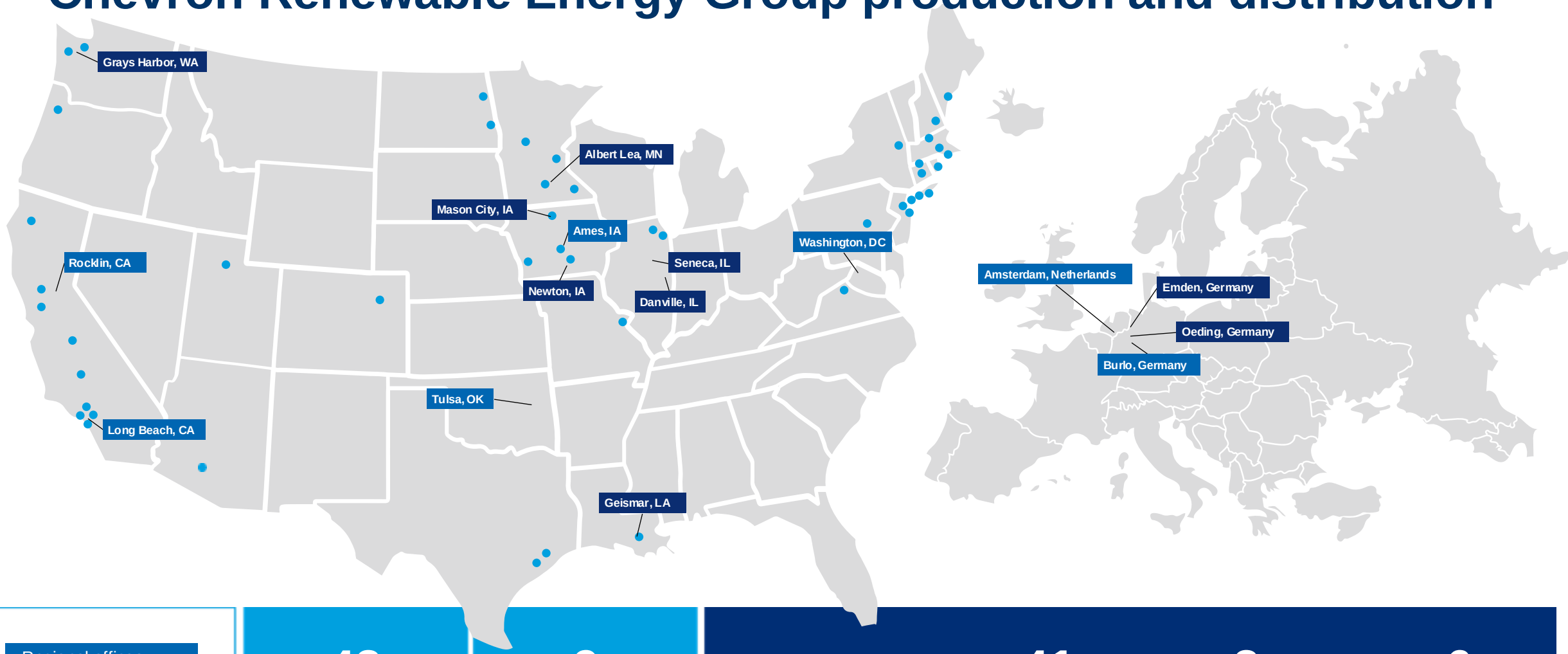
Cautionary statement

CAUTIONARY STATEMENTS RELEVANT TO FORWARD-LOOKING INFORMATION FOR THE PURPOSE OF "SAFE HARBOR" PROVISIONS OF THE PRIVATE SECURITIES LITIGATION REFORM ACT OF 1995

This document contains forward-looking statements relating to Chevron's operations and lower carbon strategy that are based on management's current expectations, estimates, and projections about the petroleum, chemicals, and other energy-related industries. Words or phrases such as "anticipates," "expects," "intends," "plans," "targets," "advances," "commits," "drives," "aims," "forecasts," "projects," "believes," "approaches," "seeks," "schedules," "estimates," "positions," "pursues," "progress," "may," "can," "could," "should," "will," "budgets," "outlook," "trends," "guidance," "focus," "on track," "goals," "objectives," "strategies," "opportunities," "poised," "potential," "ambitions," "aspires" and similar expressions, and variations or negatives of these words, are intended to identify such forward-looking statements, but not all forward-looking statements include such words. These statements are not guarantees of future performance and are subject to numerous risks, uncertainties and other factors, many of which are beyond the company's control and are difficult to predict. Therefore, actual outcomes and results may differ materially from what is expressed or forecasted in such forward-looking statements. The reader should not place undue reliance on these forward-looking statements, which speak only as of the date of this report. Unless legally required, Chevron undertakes no obligation to update publicly any forward-looking statements, whether as a result of new information, future events or otherwise.

Among the important factors that could cause actual results to differ materially from those in the forward-looking statements are: changing crude oil and natural gas prices and demand for the company's products, and production curtailments due to market conditions; crude oil production quotas or other actions that might be imposed by the Organization of Petroleum Exporting Countries and other producing countries; technological advancements; changes to government policies in the countries in which the company operates; public health crises, such as pandemics and epidemics, and any related government policies and actions; disruptions in the company's global supply chain, including supply chain constraints and escalation of the cost of goods and services; changing economic, regulatory and political environments in the various countries in which the company operates; general domestic and international economic, market and political conditions, including the military conflict between Russia and Ukraine, the conflict in Israel and the global response to these hostilities; changing refining, marketing and chemicals margins; the company's ability to realize anticipated cost savings and efficiencies associated with enterprise structural cost reduction initiatives; the potential for gains and losses from asset dispositions or impairments; the possibility that future charges related to enterprise structural cost reduction initiatives, impairments and other obligations may be greater or different than anticipated, including as a result of unexpected or changed facts, circumstances and assumptions; actions of competitors or regulators; timing of exploration expenses; timing of crude oil liftings; the competitiveness of alternate-energy sources or product substitutes; development of large carbon capture and offset markets; the results of operations and financial condition of the company's suppliers, vendors, partners and equity affiliates; the inability or failure of the company's joint-venture partners to fund their share of operations and development activities; the potential failure to achieve expected net production from existing and future crude oil and natural gas development projects; potential delays in the development, construction or start-up of planned projects; the potential disruption or interruption of the company's operations due to war, accidents, political events, civil unrest, severe weather, cyber threats, terrorist acts, or other natural or human causes beyond the company's control; the potential liability for remedial actions or assessments under existing or future environmental regulations and litigation; significant operational, investment or product changes undertaken or required by existing or future environmental statutes and regulations, including international agreements and national or regional legislation and regulatory measures related to greenhouse gas emissions and climate change; the potential liability resulting from pending or future litigation; the risk that regulatory approvals and clearances related to the Hess Corporation (Hess) transaction are not obtained or are obtained subject to conditions that are not anticipated by the company and Hess; potential delays in consummating the Hess transaction, including as a result of the ongoing arbitration proceedings regarding preemptive rights in the Stabroek Block joint operating agreement; risks that such ongoing arbitration is not satisfactorily resolved and the potential transaction fails to be consummated; uncertainties as to whether the potential transaction, if consummated, will achieve its anticipated economic benefits, including as a result of risks associated with third party contracts containing material consent, anti-assignment, transfer or other provisions that may be related to the potential transaction that are not waived or otherwise satisfactorily resolved; the company's ability to integrate Hess' operations in a successful manner and in the expected time period; the possibility that any of the anticipated benefits and projected synergies of the potential transaction will not be realized or will not be realized within the expected time period; the company's future acquisitions or dispositions of assets or shares or the delay or failure of such transactions to close based on required closing conditions; government mandated sales, divestitures, recapitalizations, taxes and tax audits, tariffs, sanctions, changes in fiscal terms or restrictions on scope of company operations; foreign currency movements compared with the U.S. dollar; higher inflation and related impacts; material reductions in corporate liquidity and access to debt markets; changes to the company's capital allocation strategies; the effects of changed accounting rules under generally accepted accounting principles promulgated by rule-setting bodies; the company's ability to identify and mitigate the risks and hazards inherent in operating in the global energy industry; and the factors set forth under the heading "Risk Factors" on pages 20 through 26 of the company's 2023 Annual Report on Form 10-K and in subsequent filings with the U.S. Securities and Exchange Commission. Other unpredictable or unknown factors not discussed in this report could also have material adverse effects on forward-looking statements.

Chevron Renewable Energy Group production and distribution



Regional offices

Active Biorefineries

Terminal locations

43 Terminals

9 Active biorefineries

Delivered product to:

41 States

3 Canadian provinces

6 Countries

Our story told in numbers

420 MMGY
nameplate production capacity

8
active biodiesel production facilities

1
renewable diesel facility

708 MM
gallons sold in 2024

10
terminals in California

39
fuel terminals across U.S.

50,000+
truckloads in 2023

180+
water movements in 2023

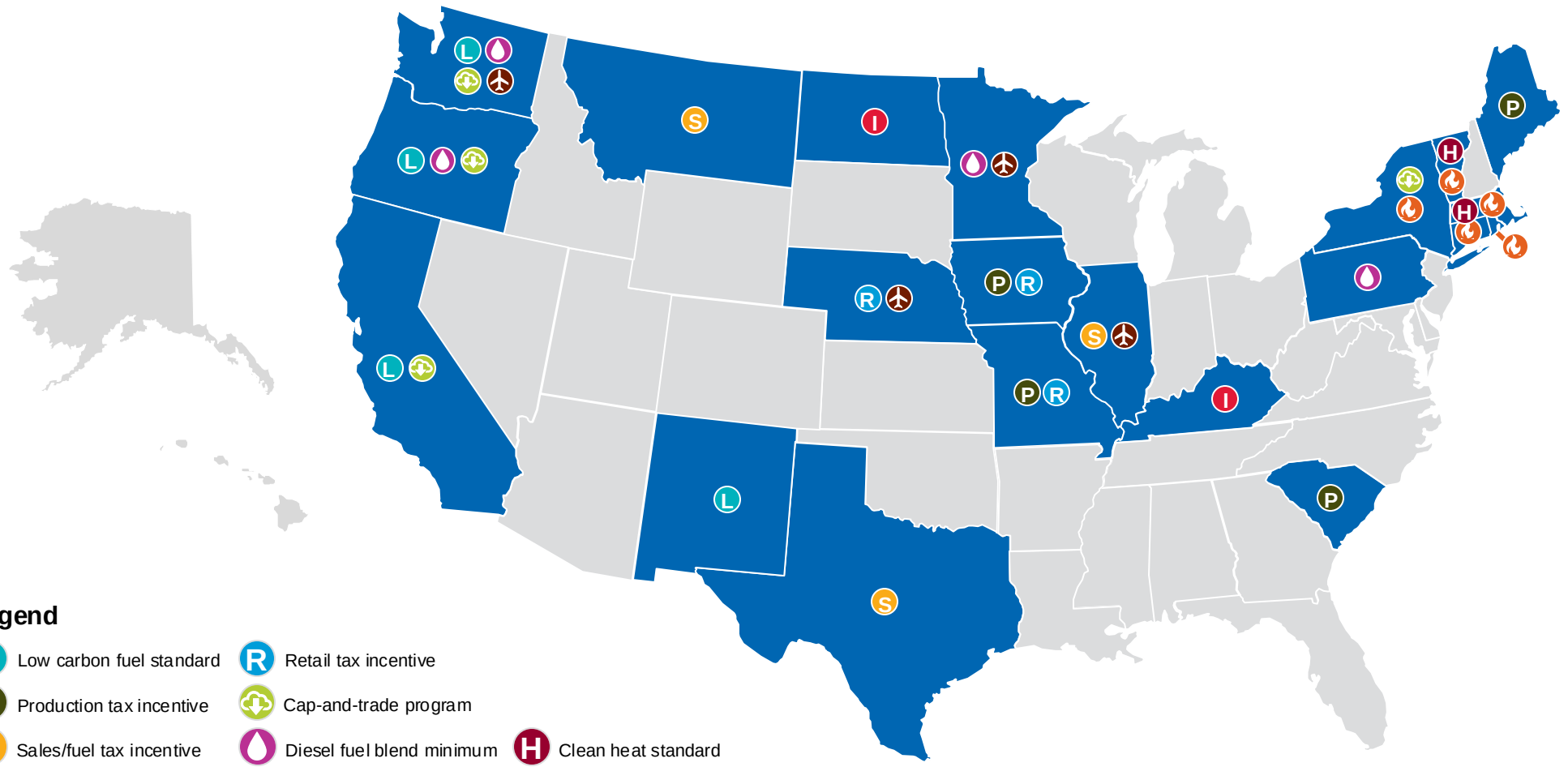
7,500+
railcars loaded in 2023

6
countries product was sold to in 2023

41
states product was sold to in 2023

Supportive biofuels policies at the U.S. state level

For biodiesel, renewable diesel and sustainable aviation fuel



Legend

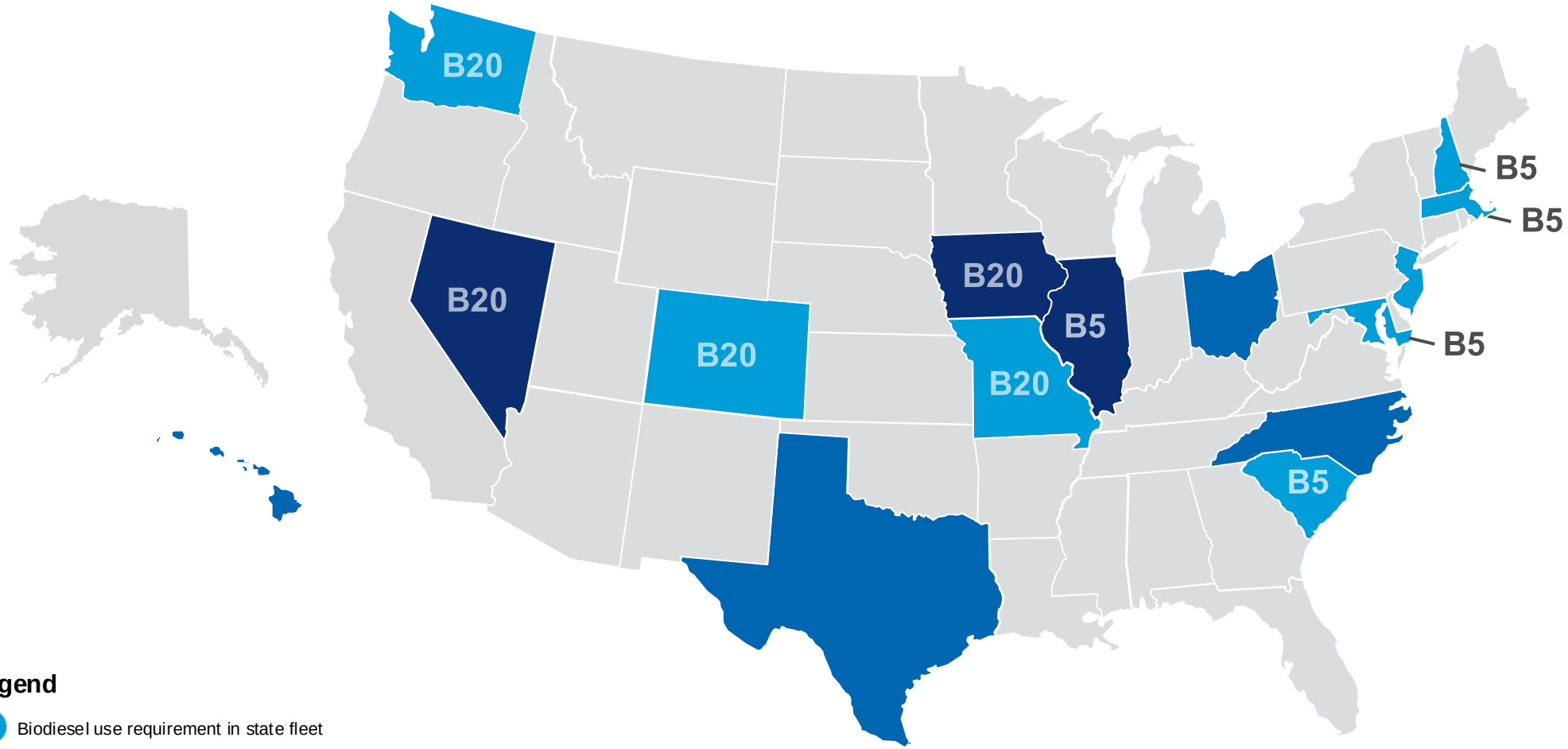
- L — Low carbon fuel standard
- R — Retail tax incentive
- P — Production tax incentive
- Cap-and-trade program
- S — Sales/fuel tax incentive
- Diesel fuel blend minimum
- H — Clean heat standard
- I — Income tax incentive
- Heating oil blend minimum
- Sustainable aviation fuel incentive

NOTE: LCFS and cap-and-trade includes states that have implemented OR that plan to implement regulations. New Mexico is working to implement an LCFS; New York and Oregon are working to implement cap-and-trade.

1) The Federal Renewable Fuel Standard is applicable to all U.S. states. The Blenders Tax Credit is a federal program that expires Dec. 31, 2024, and will be replaced by the Clean Fuel Production Credit.
2) This map does not reflect states that have but do not enforce a minimum biodiesel blend standard (for example, New Mexico), or state incentives for ethanol or other biofuels.
3) Source: U.S. Department of Energy Alternative Fuels Data Center (https://afdc.energy.gov/fuels/laws/BIOD)

States with policies to enable biodiesel use in their fleets

Sets minimum blend use and/or fleet buying guidelines for state agencies



Legend

- Biodiesel use requirement in state fleet
- High biodiesel blend capability requirement for state fleet
- Biodiesel use and high biodiesel blend capability requirements

1) This map does not include states that have a 2% biodiesel (B2) use requirement for their fleet; ultra low sulfur diesel fuel can contain up to 5% biodiesel (B5) with no separate labelling required at the pump.
2) Source: U.S. Department of Energy Alternative Fuels Data Center (https://afdc.energy.gov/fuels/laws/BIOD)

Benefits of biodiesel

Oxygenated fuel

Adaptable lower carbon fuel

High-quality biofuel for use in most conventional diesel applications

Lower engine emissions

Oxygen in fuel molecules helps engine burn fuel more completely and can reduce tailpipe emissions

Non-toxic and non-hazardous

Safety requirements for transport and handling of B100 are comparable to vegetable oil

Highly blendable

Can be blended at various levels with diesel and biodiesel for lower carbon options that provide greater customer choice

Enhanced lubricity

No lubricity additives are needed when BD is blended with ULSD or RD at 2% or higher

[1] Product is produced from renewable oils and fats. Methanol used to make biodiesel and hydrogen used to make renewable diesel and SAF are typically made from conventional natural gas but can be produced from renewable resources.
[2] CARB Assessment of the Emissions from the Use of Biodiesel as a Motor Vehicle Fuel in California "Biodiesel Characterization and NOx Mitigation Study", Durbin (2011)

Benefits of renewable diesel

Paraffinic fuel

High quality drop in fuel

Can serve as a direct replacement to petroleum diesel with stringent quality standards that exceed ASTM, CEN and CGSB specifications

Ultra-high Cetane

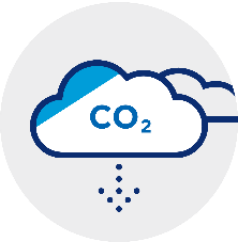
Cetane number above 65 indicates enhanced engine combustion that helps reduce engine emissions

Desirable cloud point

Consistent cloud point is typically less than -10 °C and similar to winter pipeline specification limits for petroleum diesel at around -10 °C

Highly blendable

Can be blended at virtually any level with diesel and biodiesel for fuel options that provide greater customer choice



Lower engine emissions

Compared to petroleum diesel, RD can reduce engine emissions by:

- Up to 100% for fossil carbon[1]
- Up to 30% for particulate matter[2]
- Approximately 15% for nitrogen oxides (NOx)[2]

[1] Product is produced from renewable oils and fats. Methanol used to make biodiesel and hydrogen used to make renewable diesel and SAF are typically made from conventional natural gas but can be produced from renewable resources.

[2] CARB Assessment of the Emissions from the Use of Biodiesel as a Motor Vehicle Fuel in California "Biodiesel Characterization and NOx Mitigation Study", Durbin (2011)

Benefits of biodiesel and renewable diesel are synergistic

Blended BD/RD allows for reduced carbon intensity today in virtually any diesel application

Complementary benefits of the two fuels

- BD provides lubricity, density and elastomer swell
- RD provides NOx reduction and cetane
- 50/50 blend is most similar to petroleum diesel in fluid properties

Benefits of blended BD/RD fuel
Carbon Intensity (CI) scores that are lower than petroleum diesel allow for emissions carbon intensity reduction today
BD/RD blends can have lower freezing points than straight RD
BD/RD blends can provide one of the lowest overall engine emissions of any diesel fuel option
Elastomer swell, density and bulk modulus properties of BD/RD blends are a better match for conventional diesel than straight renewable diesel

Geismar improvement and expansion project

Total site production annual capacity will increase from 90 million gallons to 340 million gallons

Enhanced marine logistics that will enable global trading of feedstocks and fuel

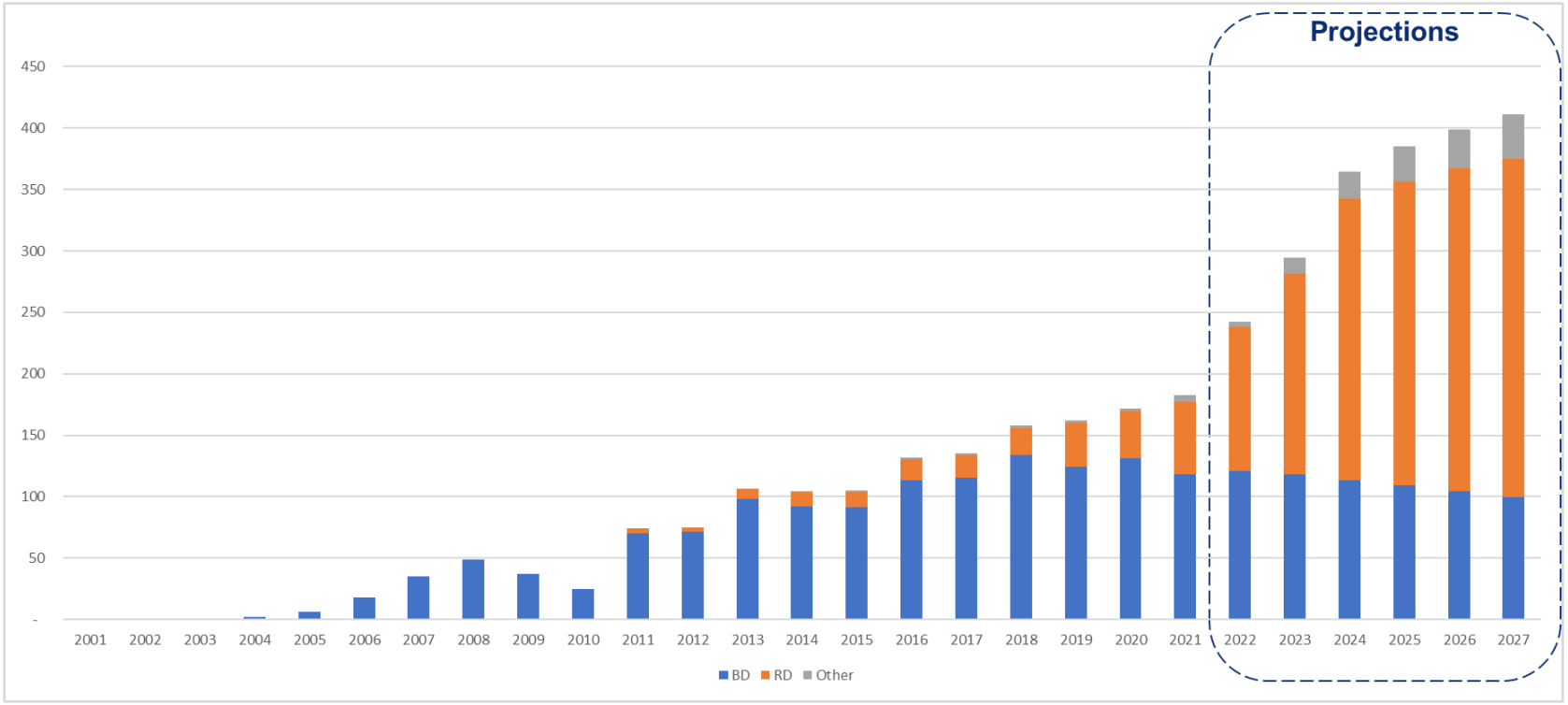
Expected to be complete Q1 2025

Growth of the renewable fuels industry is expected to continue

The last several years have seen growth of the biofuels industry, specifically in the renewable diesel space

Supportive national and state policy will continue to drive growth of the industry

Historic Production and Outlook of Biofuels in the US (MBD)



Footnotes for 2001-2021

1) MBD- Thousands of Barrels a Day
2) Data Source- EIA.gov
3) Other biofuels include renewable heating oil, renewable jet fuel (SAF), renewable naphtha, and renewable gasoline.
4) EIA timeline is ~2 years for actual production results to be reported
5) Calculation to mbd assumes 330 days of production

Footnotes for 2022-2027

1) MBD- Thousands of Barrels a Day
2) Data Source- IEA.org
3) Other only includes SAF- Sustainable Aviation Fuel
4) Projections use a base case scenario, the accelerated case is not included in the projected production.
5) Calculation to mbd assumes 330 days of production

The bio-based diesel industry has continued to grow

The U.S. bio-based diesel industry reached a record

5 billion gallons

of consumption in 2024[1]

[1]https://cleanfuels.org/2024-saw-rapid-growth-for-biodiesel-renewable-diesel/

CNG station growth

the human energy company®

Chevron

Jerome McCarville
Manager, National Accounts

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515.480.7257

RNG for Heavy-Duty Trucking

Infrastructure, pricing, and availability

RUN ON LESS MESSY MIDDLE

Clean Energy

Agenda

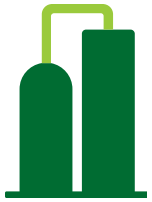
RNG for transportation

Infrastructure

Price considerations

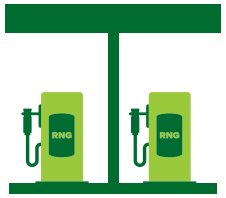
Resources

Clean Energy



RNG Supply

- Dairy/RNG production
- 3rd party RNG supply contracts
- Partnerships with major energy leaders (Chevron, bp, TotalEnergies, & Tourmaline)



Distribution

- 600+ stations (U.S. & Canada)
- Capacity to double volumes
- 50,000+ vehicles fueling daily
- 1,000 fleet customers
- Maintenance + construction

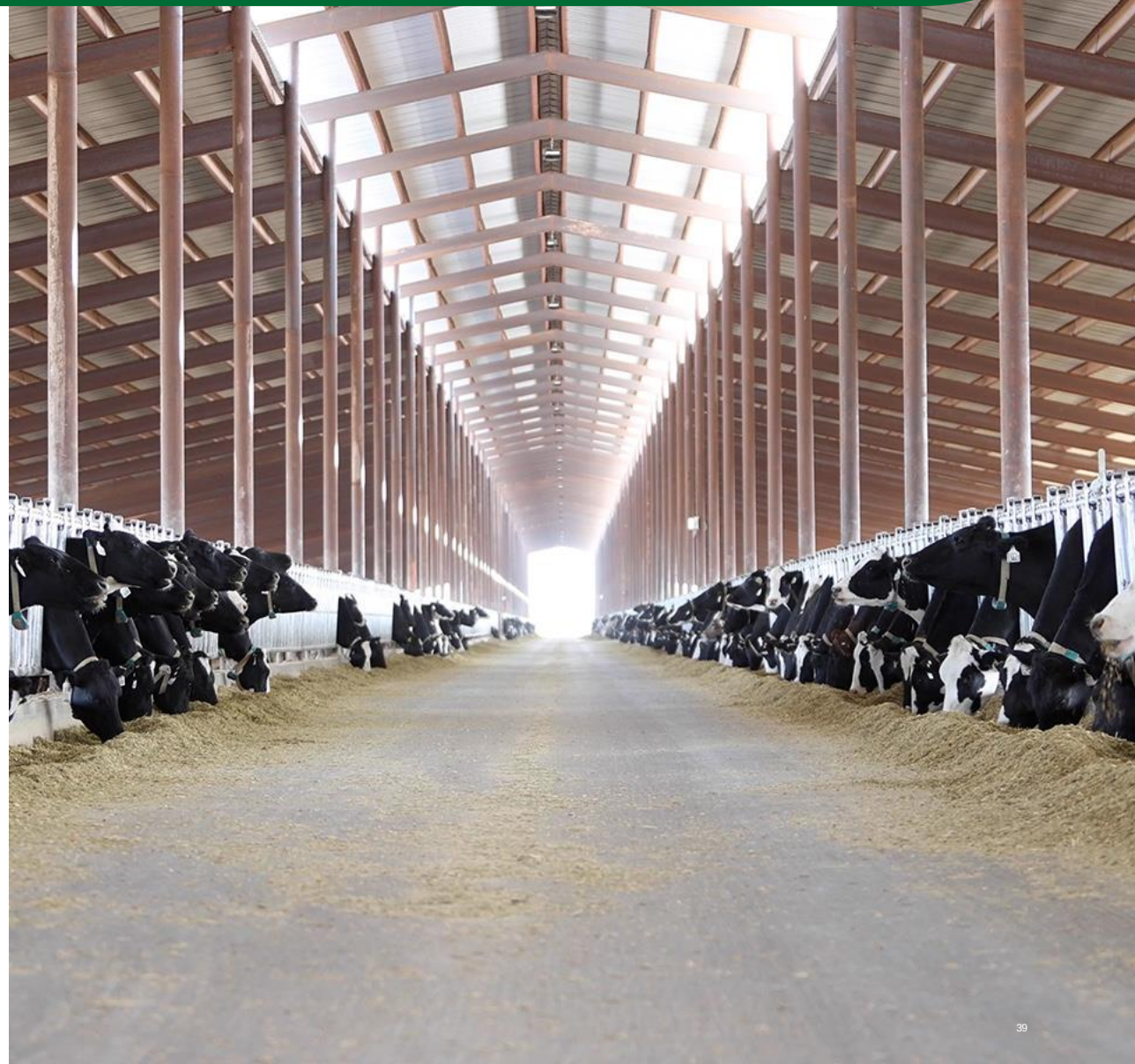
Clean Energy

- Vertically integrated RNG solutions
- 25+ years of experience
- Pioneered RNG as a commercial fuel

What is renewable natural gas (RNG)?

When organic waste decays, it naturally produces methane gas or “biogas” which can be processed and purified into RNG.

Because RNG is derived from a naturally occurring process that does not add new carbon into the atmosphere, its emissions are considered **“biogenic,”** resulting in emissions reporting benefits for end users.



Where does RNG come from?

Decomposing organic waste sources (feedstocks) that release methane gas or biogas into the atmosphere.

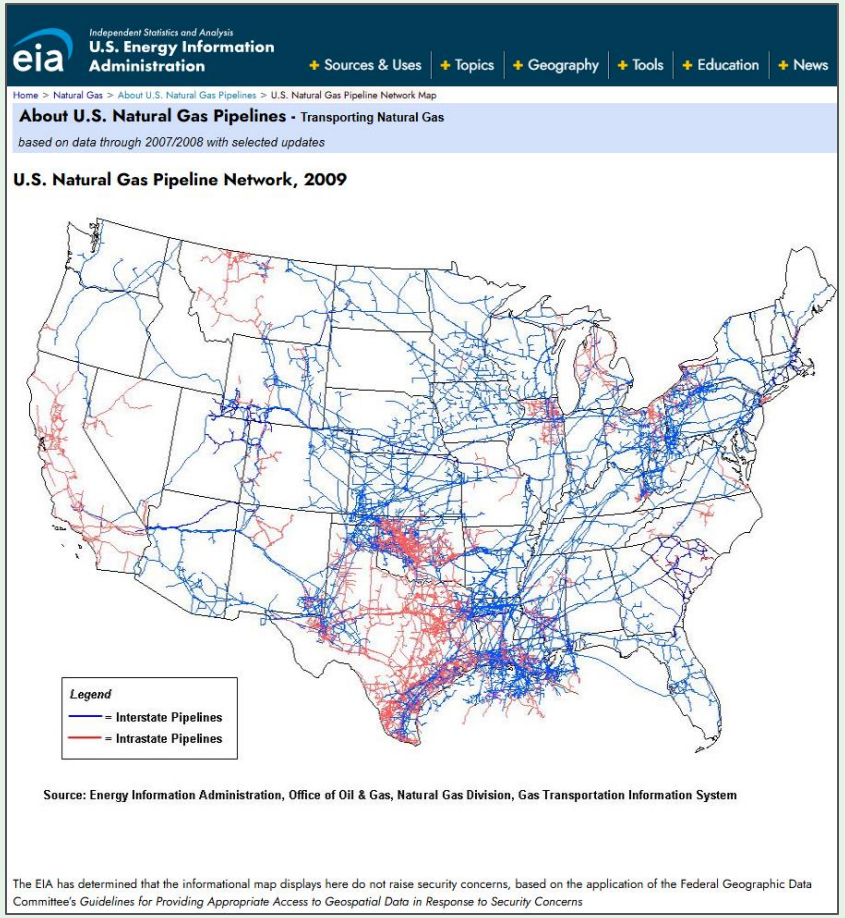
Landfill

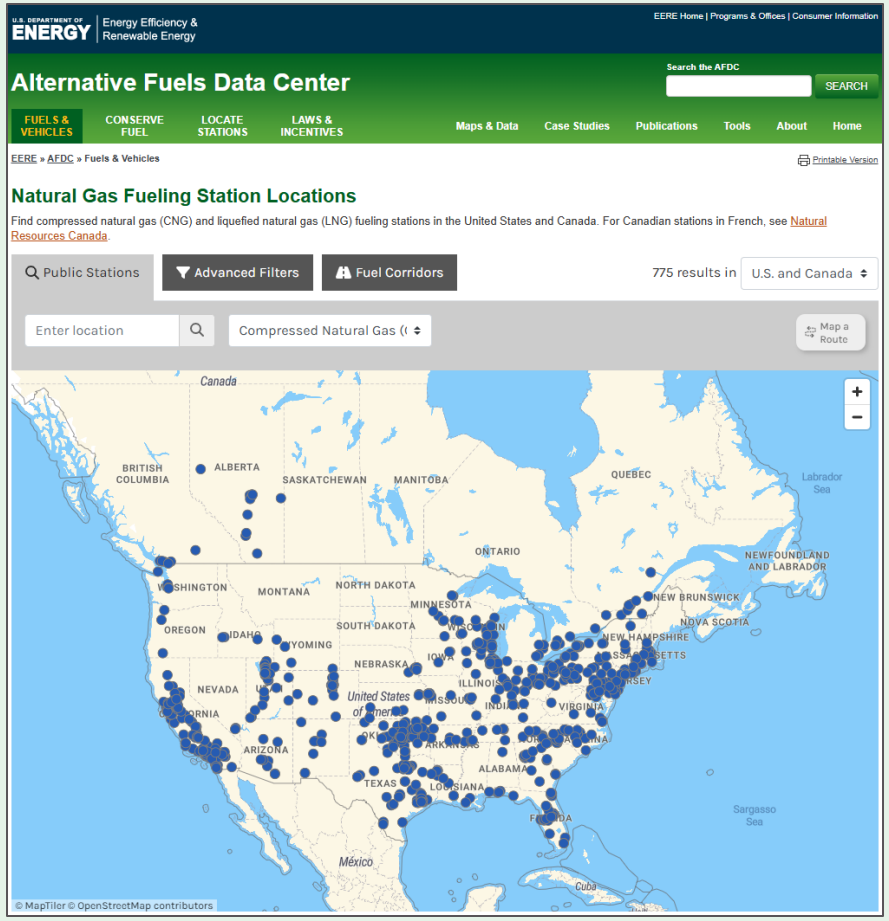
Wastewater

Livestock Manure

How is RNG made?

Natural gas transportation in the US





Clean Energy's station locator map: cnglngstations.com

Clean Energy RNG station: Davenport, FL

RNG fast-fill

Pros

- Typically built for 10 GGE/minute
- Similar experience to diesel fueling
- All major fleet, credit, and CE fuel cards accepted

Cons

- Tanks fill 85% due to heat of compression
- Possible queuing delays
- Fleet may have to go off-route

RNG time-fill

Pros

- Eliminates labor of fueling
- Tanks fill nearly to 100%. Because many trucks are fueling over a longer period, less heat buildup from fast-fill compression.

Cons

- Station designed to fuel many slowly, not singles quickly (fast-fill post or dispenser add is an option however)
- Requires dedicated parking and real estate
- More equipment to maintain

Major equipment

- Local utility natural gas / electric utilities
- Natural gas dryer
- Compressors
- Switchgear
- Motor control center
- High pressure storage
- Valve panel
- Canopy
- Dispensers or time-fill hoses, posts, and nozzles
- Point of sale system (public)

Need your own infrastructure?

Private RNG station basics:

- Minimum equipment footprint is 30' x 40'
- 10' off property lines
- Access to natural gas pipeline & utility power
- Purchase, finance, or lease:
  - $1–$4 million
  - 5–15-year finance or lease
  - Volume price breaks
  - Fuel private or public
- Timeline 9–12 months

RNG station and fuel economics

Station and fuel economics

- ~$3M investment for station to fuel 50–100 tractors
- 30C federal tax credit up to $100K in eligible community
- ~$2 per GGE fuel cost before credits
- Cost factors:
  - Compression
  - Commodity
  - Transport
  - Taxes

RNG credits

- Clean fuel “carrot & stick” regulating big oil & incentivizing clean fuel producers through deficit and credit generation and sales programs
- Federal Renewable Fuel Standard – RNG generates D3 RINs
- State Low Carbon Fuel credits (CA, OR, WA, NM)

CNG/LNG credits

- Federal alternative fuel tax credit $0.50 per GGE (2006–2024)
- Extension in 2025 and beyond possible
- $1 per gallon RNG credit proposal

RNG tractor incentives and grants

$10k Clean Energy customer OEM/dealer incentive

Grants available in a dozen or more states

Up to $50k Clean Energy buydown for new California RNG tractors & fueling

More info at: cleanenergyfuels.com/fleets

Clean Energy's X15N demo program

- 2025 Peterbilt 579 RNG day cab
- Cummins X15N engine
- 175 DGE back-of-cab fuel system
- 2-week trial period
- Fuel at Clean Energy stations
- Fleets that have already participated:

J.B. HUNT

PTI PAPER TRANSPORT

Univar Solutions

RUAN

Touchpoint

Developed in partnership with the Natural Gas Vehicle Institute (NGVi)©

Designed to make the operational transition to NGVs easy and seamless

Training platform for fleet managers, supervisors, and technicians

Ensures a successful vehicle launch and provides continued support throughout the first year

National customers

More than just fuel: turnkey solutions

RNG, CNG & LNG fueling services

RNG supply investment

Grants & financing
$655M in awards

Compressors & equipment

Engineering & construction
770+ projects

Facilities modification

Low-carbon RNG

Environmental credit generation & monetization

24/7 service & support
150+ station operations personnel

Clean Energy

Shifting carbon into reverse.

Derek Turbide
Vice President, Business Development

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949.437.1305

CleanEnergyFuels.com

UPS has been leading

sustainable fleet

innovations for decades

Environmental Sustainability Goals
Achieve carbon neutrality by 2050

By 2025

40% alternative fuel used in our ground operations

25% renewable electricity powering our facilities

By 2035

30% sustainable aviation fuel (SAF) in our air network

50% reduction in CO_2 per package delivered (2020 baseline)

100% renewable electricity powering our facilities

Company goals are aspirational and not guarantees or promises that all goals will be met, due to dependence on technological innovations and other available resources needed to drive environmental change. Statistics and metrics relating to ESG matters are estimates and may be based on assumptions or evolving standards.

Guiding Principles

- Lead with integrity
- Holistic vision of sustainability
- Deliver impact, not just promises
- Delink growth from GHG emissions
- Take a fiscally-responsible approach based on sound engineering principles

Global Alternative Fuel & Advanced Technology Vehicles

Total Vehicles (U.S. & International): 19,000+

United States Fleet:

- Compressed Natural Gas Vehicles
- Liquid Natural Gas Vehicles
- Hybrid Electric Vehicles
- Electric Vehicles
- Propane Vehicles
- Electric Bikes

International Small Package Fleet:

- Propane Vehicles
- Compressed Natural Gas Vehicles
- Electric Vehicles
- Electric Bikes
- Ethanol Vehicles
- Liquid Natural Gas
- Hybrid Electric Vehicles

Zero - Near Zero Building

Summary

UPS is committed to Carbon Neutral by 2050.

- Aggressive goals based off UPS's 2020 baseline emissions.

UPS continues to grow its industry leading Advanced Technology and Alternative fueled fleet.

16% last year with more significant growth planed in 2025.

All the Above approach to low carbon solutions.

Rolling Laboratory is an opportunity to test and validate emission reductions in real world applications.

Energy agnostic: from human power to hydrogen, all solutions are needed in the efforts to reduce emissions.

From trash to transportation fuel = Biomethane.

Methane is 80x more potent at warming the atmosphere than carbon.

RNG is an elegant carbon-negative solution that makes a difference today.

THANK YOU

First Electric UPS Delivery Vehicles, Los Angeles California, 1936

Q&A

Future Prices & Availability of Existing Infrastructure: What's Next?

Ryan Bankerd
Global Director of Automotive Sustainability
UPS

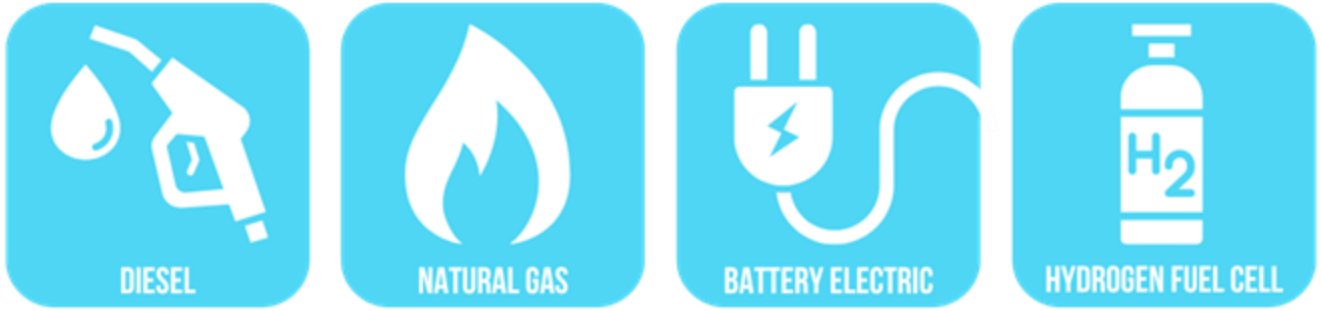
Jerome McCarville
Manager, National Accounts
Chevron Renewable Energy Group

Nik Pavlenko
Programs Director, Fuels and Aviation
International Council on Clean Transportation (ICCT)

Derek Turbide
Vice President of Renewable Natural Gas Solutions for Trucks & Buses
Clean Energy Fuels

RUN ON LESS MESSY MIDDLE

MESSY MIDDLE BOOTCAMP



Let's Stay Connected…

NACFE (& Spanish: NACFE LATAM)

NACFE

@NACFE_Freight & @RunOnLess

NACFE

NACFE
NORTH AMERICAN COUNCIL FOR FREIGHT EFFICIENCY

NACFE.org

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MESSY MIDDLE

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BOOTCAMP