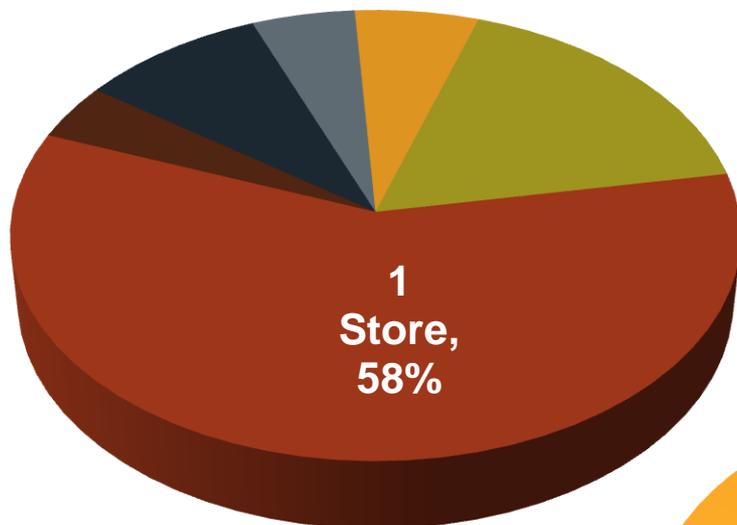


Fuels of the Future: Accelerating the Co-Optimization of Fuels and Engines

**John Eichberger
Executive Director, The Fuels Institute
Vice President Government Relations, NACS**

Retail Market

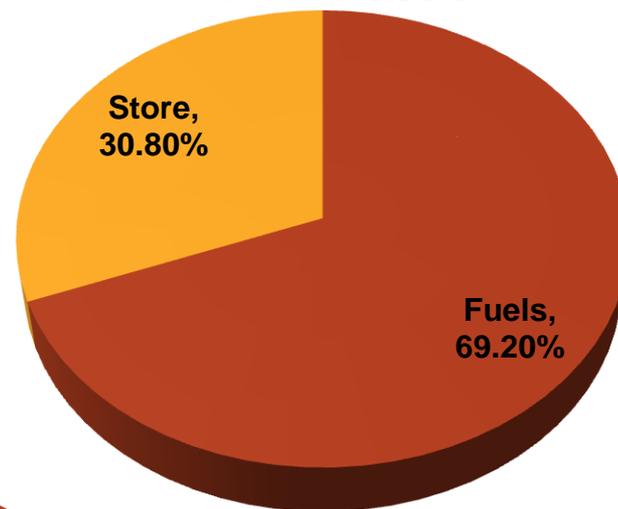
Store Ownership



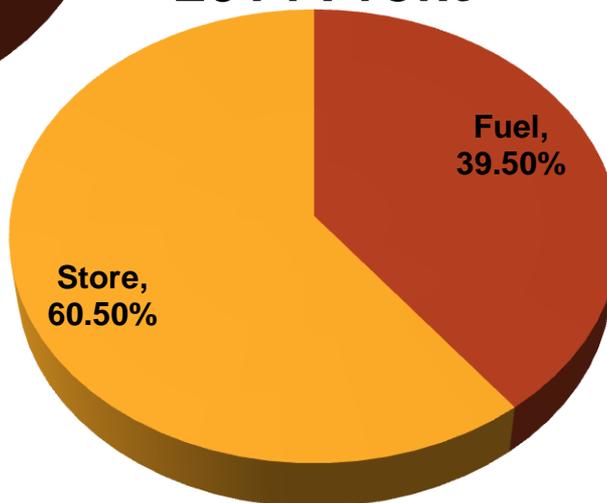
127,588 C-stores sell fuel

>74,000 are one store companies

2014 Sales



2014 Profit



Hurdles to Overcome



- How many fuel tanks?
 - How to configure system?
- Are dispensers approved?
 - Are approved units avail?
- Who will supply fuel?
 - How reliable is supply?
- How many customers?
 - What if fuel is mis-used?
- What kind of QAP?
- What is possible ROI?

Take Aways

- **Retailers will sell what their customers want**
- **They must have:**
 - **Approved equipment**
 - **Reliable and competitive supply**
 - **Sufficient demand**
- **Co- Optimize Strategies**
 - **Design engine/fuel specs to fit realistic infrastructure**
 - **Communicate with retailers expected market size**
 - **Coordinate with retailers to market benefits of new fuel**