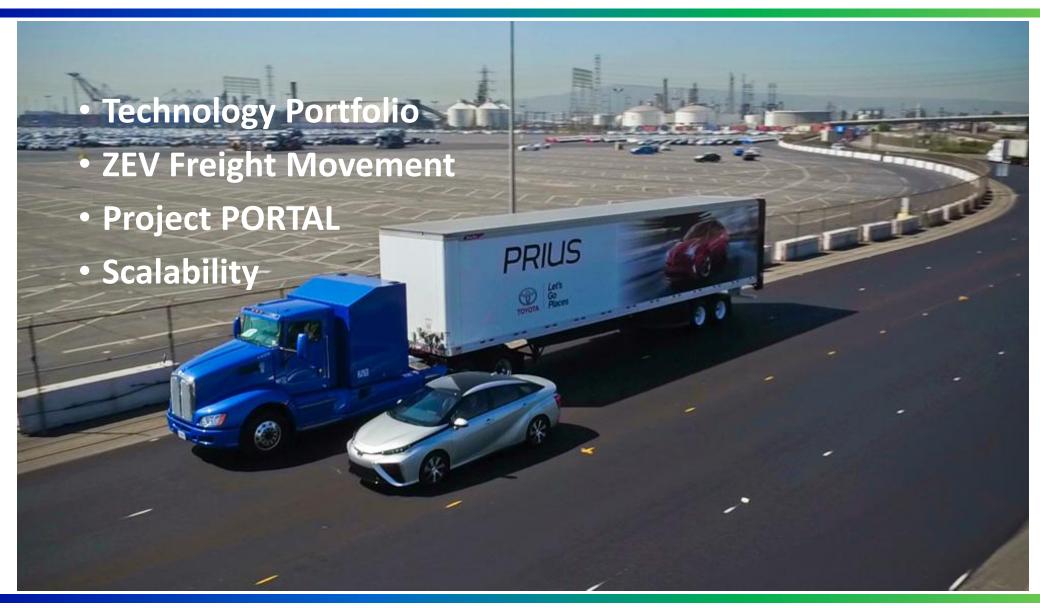
Fuel Cell Applications

DOE Truck Targets Workshop



Presentation Key Topics





Toyota Sustainable Mobility Philosophy

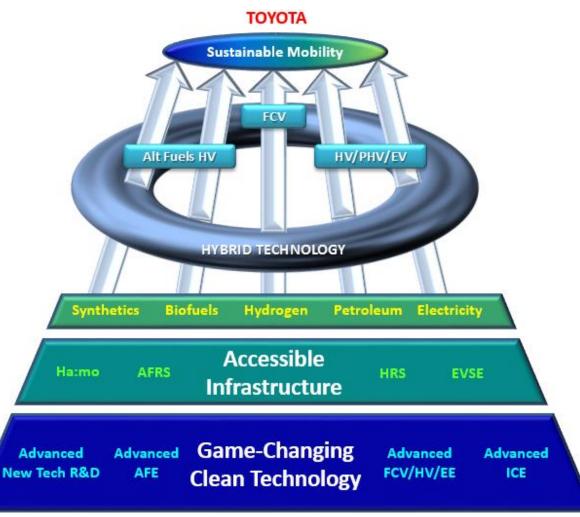




CHALLENGE 1 CHALLENGE 2 **New Vehicle** Life Cycle Zero CO₂ Zero CO₂ **Emissions Challenge Emissions Challenge** CHALLENGE 3 CHALLENGE 4 Challenge of Plant Zero CO₂ Minimizing and **Optimizing Emissions Challenge** Water Usage CHALLENGE 5 CHALLENGE 6 Challenge of Challenge of Establishing a Establishing a **Future Society** Recycling-based in Harmony

with Nature

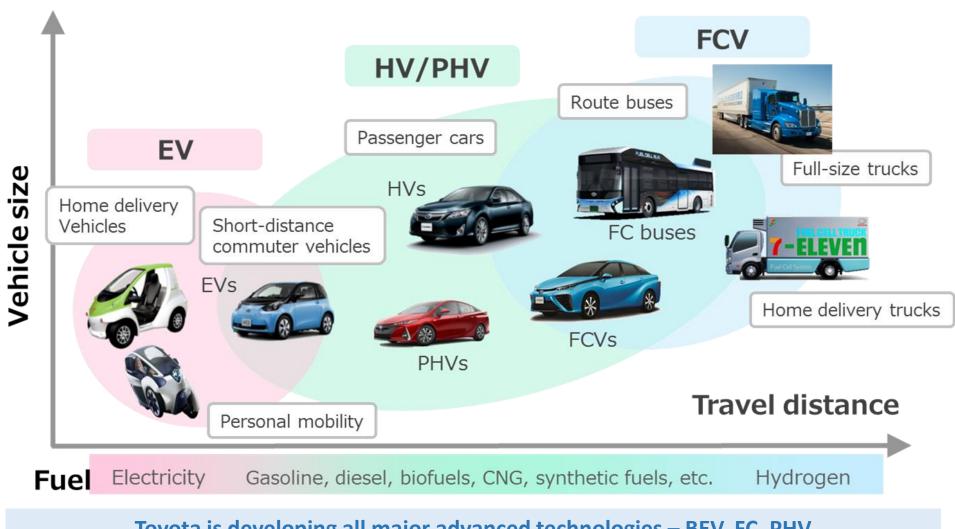
Society and Systems





Technology Portfolio

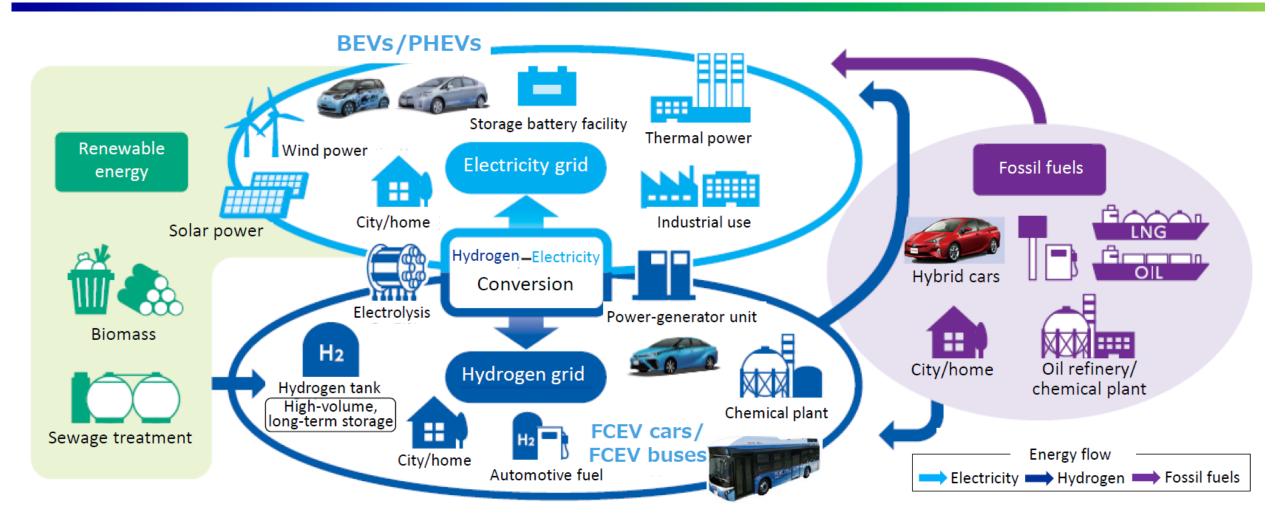




Toyota is developing all major advanced technologies – BEV, FC, PHV

Energy Ecosystem





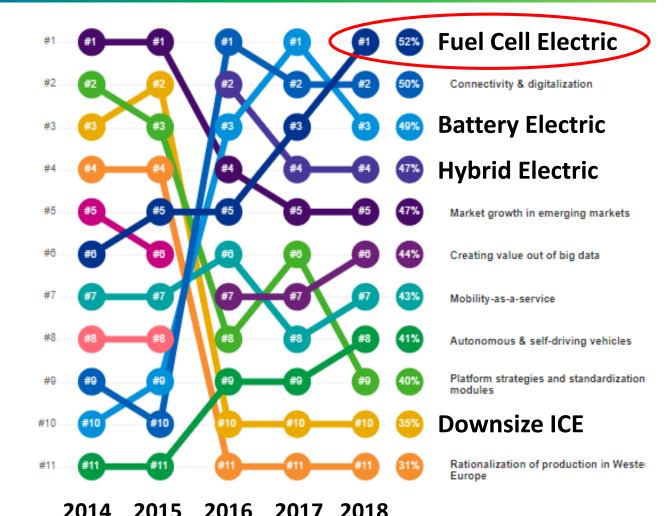
Toyota's portfolio approach is synergistic with a broad energy ecosystem



Global Automotive Trend



- I. Global Automotive Executive Survey 2018
 - Rates FCEVs as the #1 priority in 2018
- II. Strong ZEV and emissions goals
 - Countries: Non-EV sales bans
 - Auto Companies: phase out non-EV production and sales
 - Local Regions: Ports and Cities setting more stringent goals



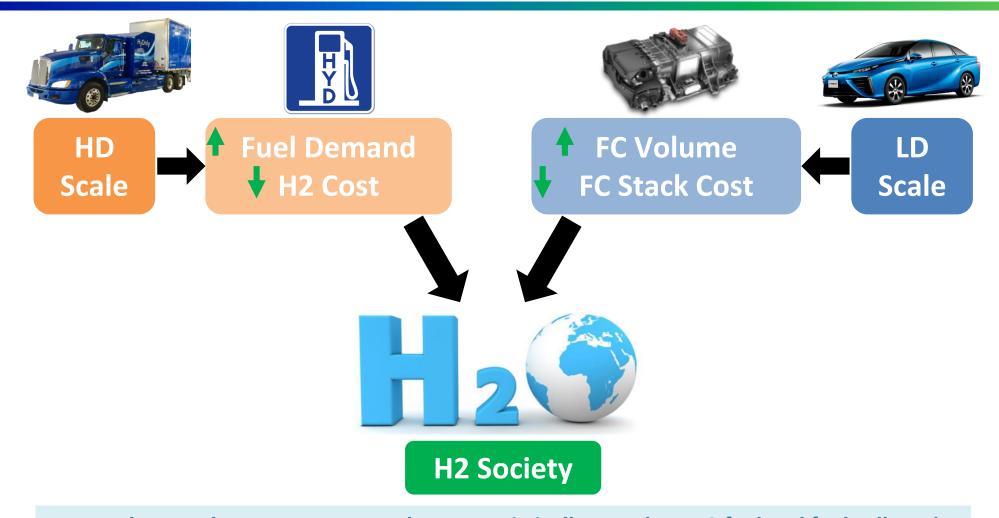
Note: Percentage of executives rating a trend as extremely important

Source: KPMG's Global Automotive Executive Survey 2018 | © KPMG Automotive Institute

2014 2015 2018 2017 2018 n= 200 200 800 953 907

Light-Duty and Heavy-Duty Synergy



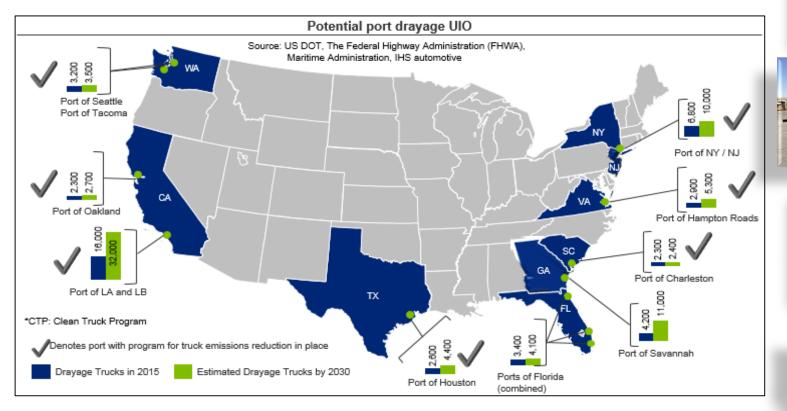


HD and LD markets can grow together synergistically to reduce H2 fuel and fuel cell stack costs which enables a hydrogen society

Zero Emission MHDV Market pull



- Zero Emission MDHV: Large market pull
- High mileage, long idle time, low fuel economy
 - -> Higher emissions.



Numerous Clean MHDV announcements

















The San Pedro Ports Solution







Desire to expand while reducing emissions

High impact to disadvantaged communities

Clean Air Action Plan

2030: Terminal Trucks ZEV

• 2035: All Trucks ZEV

Requires ZEV solution





Key Elements for Clean Trucks



ZEV Technology

- Zero Emissions
- Performance
- Durability
- Affordable

- Fuel Cost
- Vehicle Cost
- Maintenance Cost
- 2nd Life/Resale

Cost Of Ownership

Infrastructure

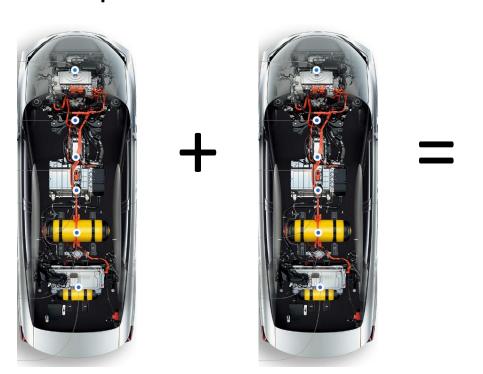
- Fast re-fueling
- High Throughput
- Scalability
- Renewable Fuel
- Safety

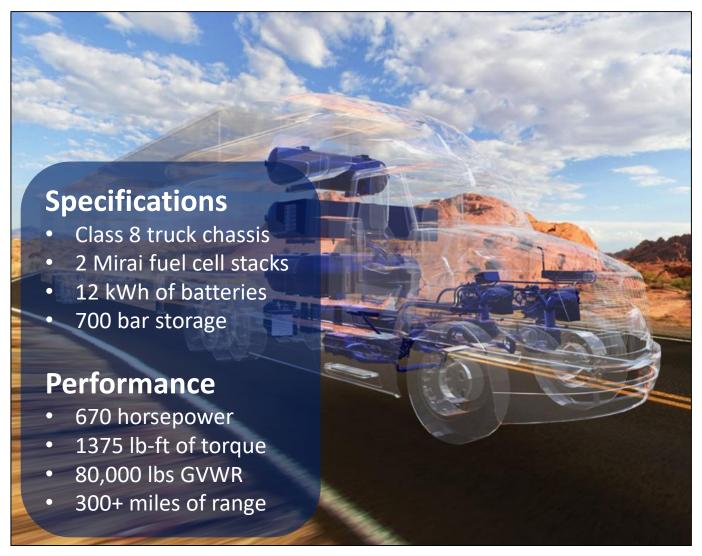


PORTAL Specs



- Leverage Mirai components from 2 vehicles
- Benchmark current class 8 truck performance





Performance: Drag Test

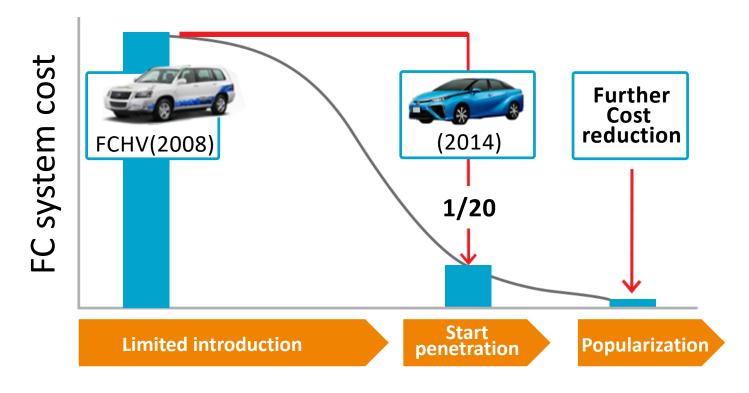


http://pressroom.toyota.com/video_display.cfm?video_id=34150

Vehicle Cost



Toyota Fuel Cell Cost Reduction





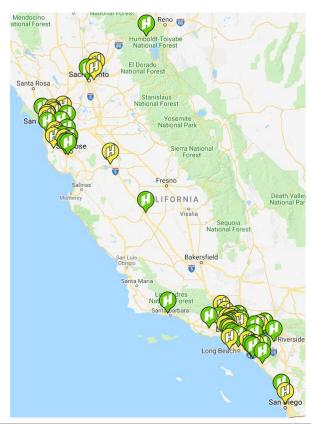
- > Achieved significant cost reduction from Mirai development
- > Leverage Mirai technology in Portal to reduce cost

Infrastructure: Light-Duty and Heavy-Duty



California Light Duty Station Network

- Executive Order:200 stations by 2025
- 35 current open retail
- ~30 additional stations funded



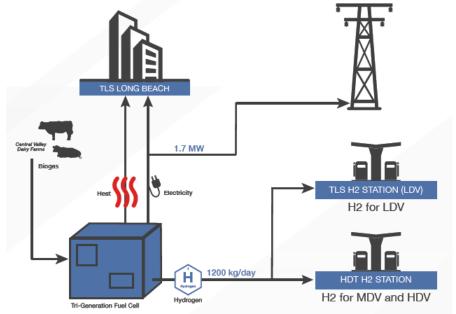
Heavy-Duty Stations



Station in POLB
(Air Liquide) - currently operating

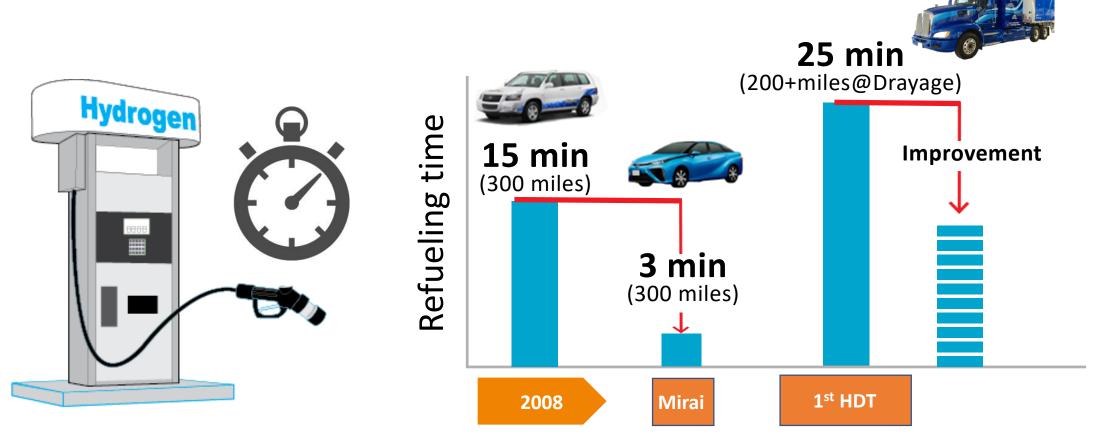
<u>Tri-generation Station in POLB</u> (Shell, Fuel Cell Energy) - *Q1 2020*

- 100% renewable hydrogen and electricity production
- Awarded \$8MM grant from the California Energy Commission



Infrastructure: Refueling time





- > Expect practical refueling time for FCET
- > Requires new development and collaboration (similar to LD)

Scalability of ZEV Technology



Increasing Vehicle Size Mobility Applications Fleet Regional **National** Infrastructure **Considerations National Station Network** 1 H2 Station **Regional Station Network FCEV:** Numerous Depot/Fast Charge Locations **BEV:** Depot charging National Charging Demand FC technology is a viable ZEV solution across a broad range of applications **Key Points** H2 fueling infrastructure is scalable and meets the needs of end users EV charging infrastructure quickly realizes grid constraints and high demand charges when scaled up

PORTAL in Action







Video Links



Project Unveiling

http://pressroom.toyota.com/video_display.cfm?video_id=34149

Truck build and drag test

https://www.youtube.com/watch?v=E3993-Pczhl

Drag test

http://pressroom.toyota.com/video_display.cfm?video_id=34150