



# The Energy Debate

# 2010

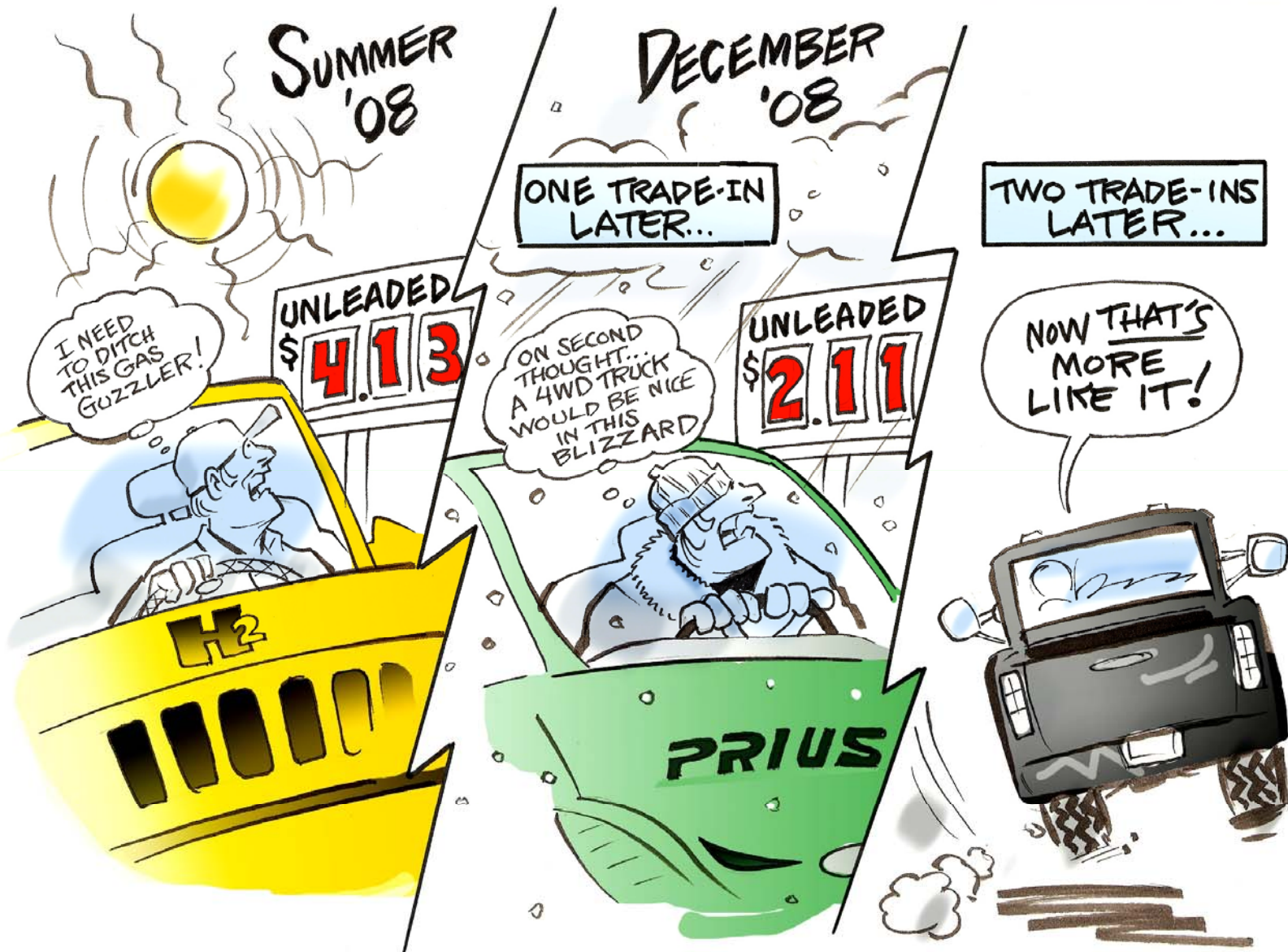
# AutoNation▶



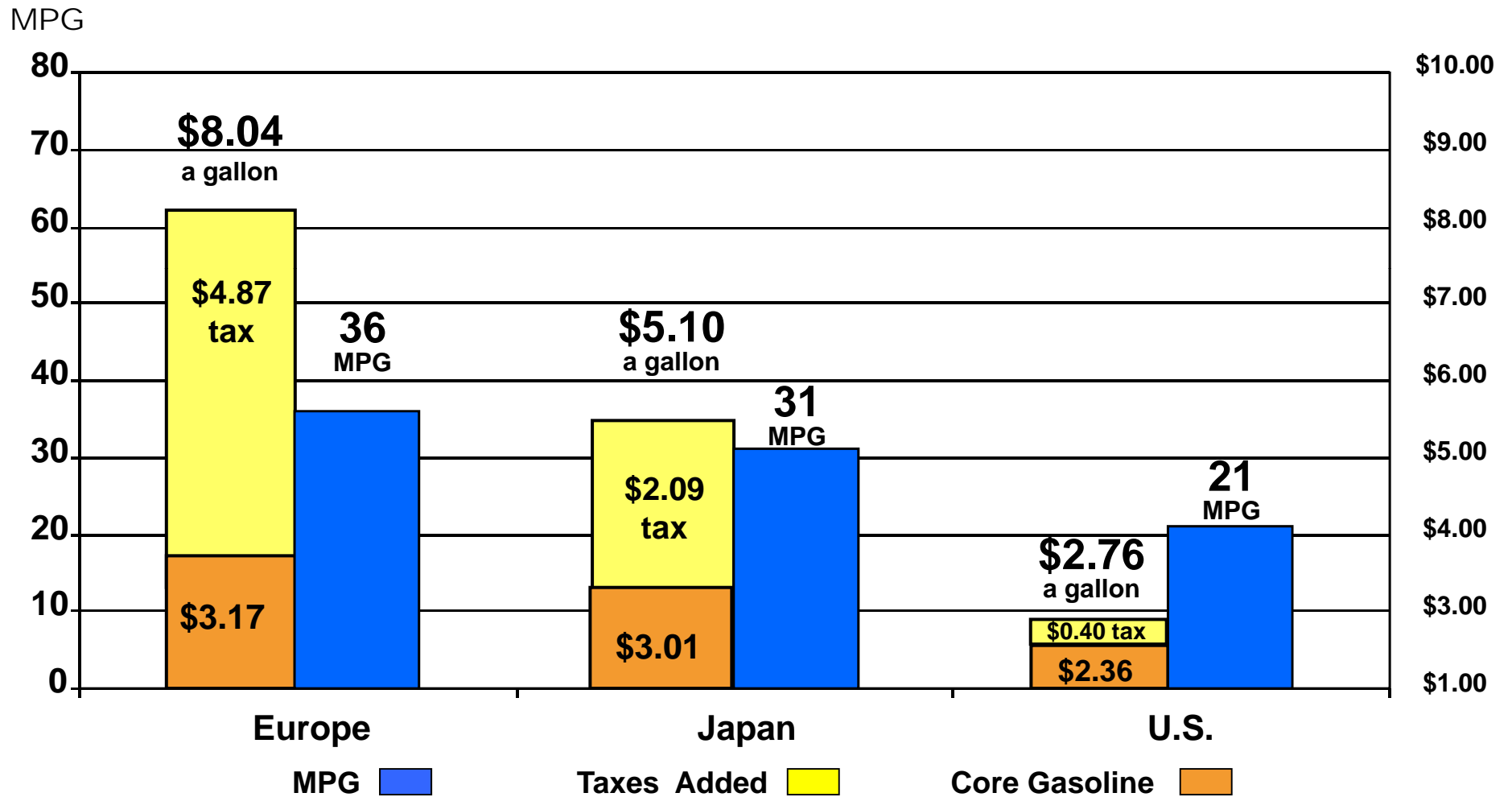


**Energy !**

# Gas Volatility



# Gas Prices vs. Fuel Efficiency

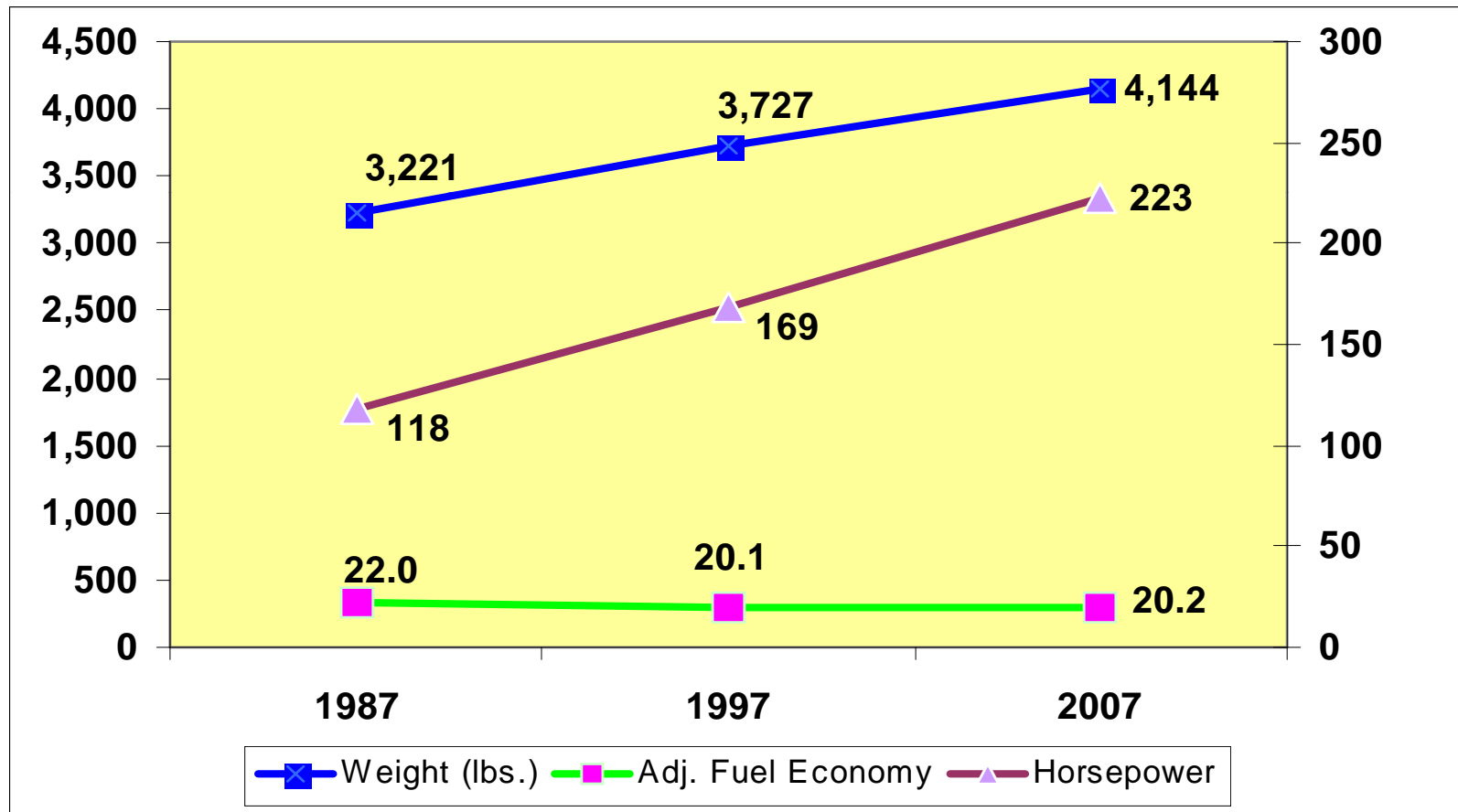


January 2010



# Fuel Economy

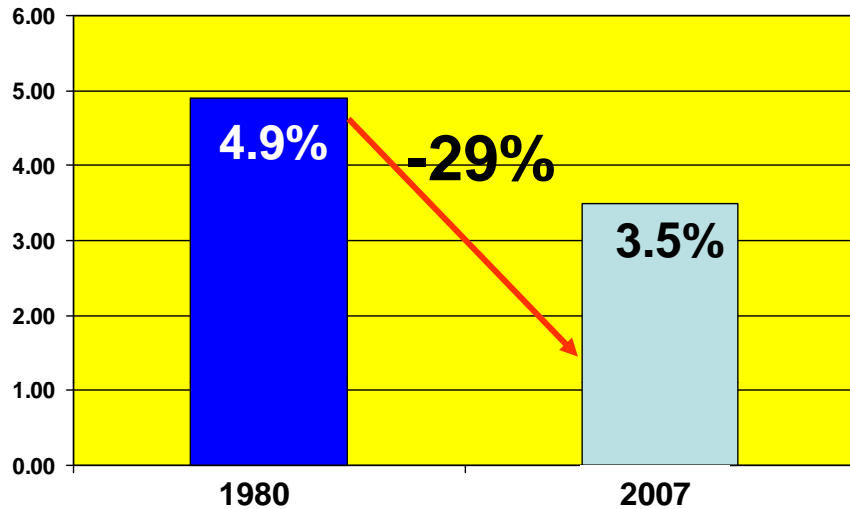
## Vehicle Weight, Horsepower and MPG



Source: EPA

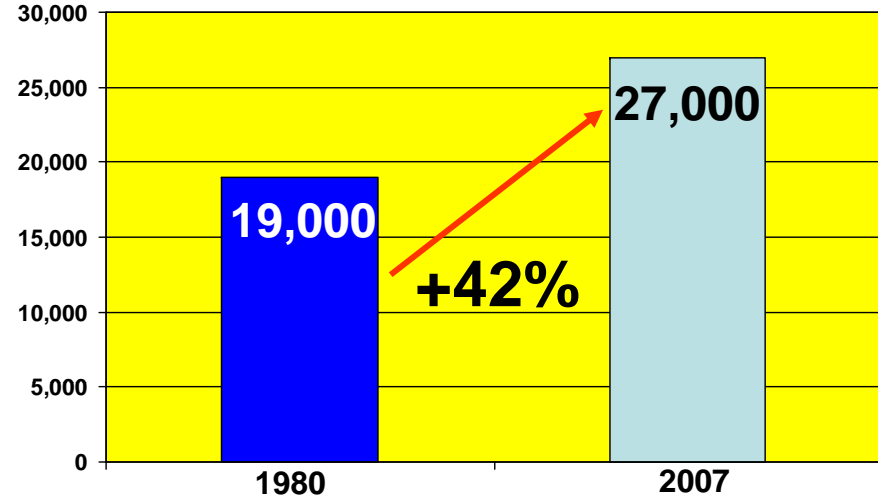
# Energy In America

## Consumer Expenditures Gas & Oil - % Of Personal Income



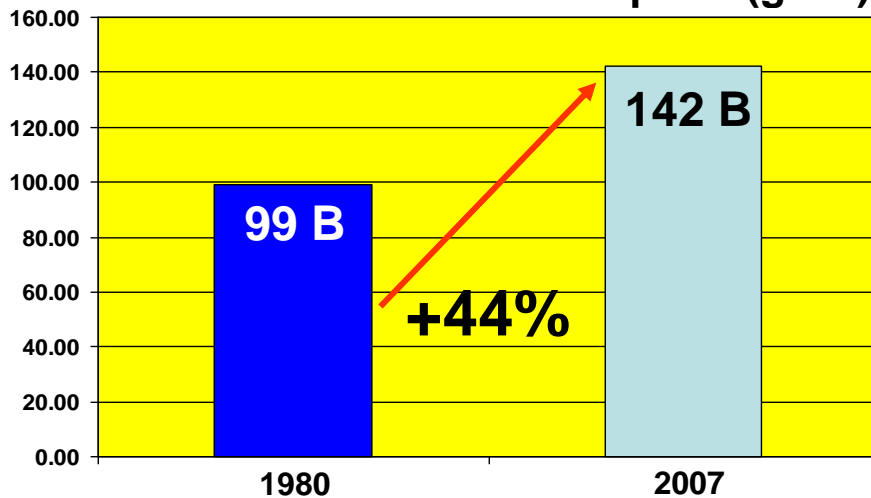
Source: Bureau of Economic Analysis

## Miles Driven Per Household



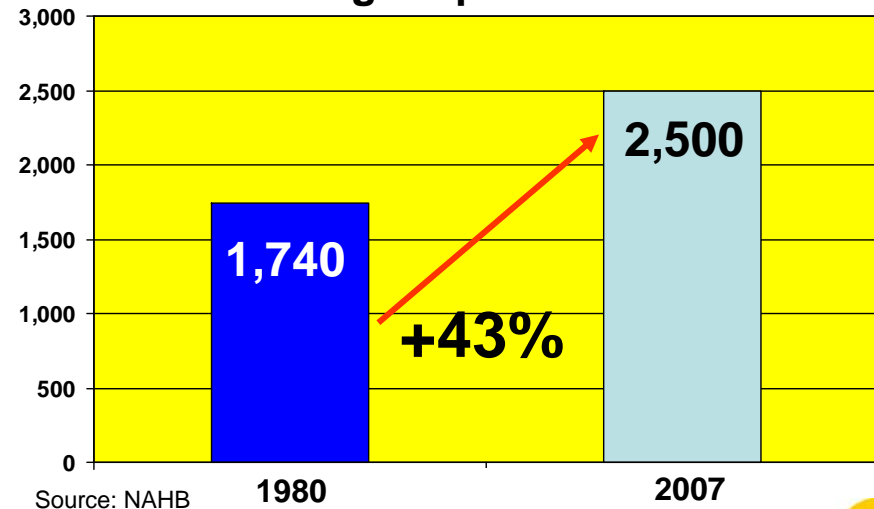
Source: Dept. of Energy & Transportation

## Motor Gasoline Consumption (gals.)



Source: Dept. of Energy

## Average Sq. Ft. - Homes

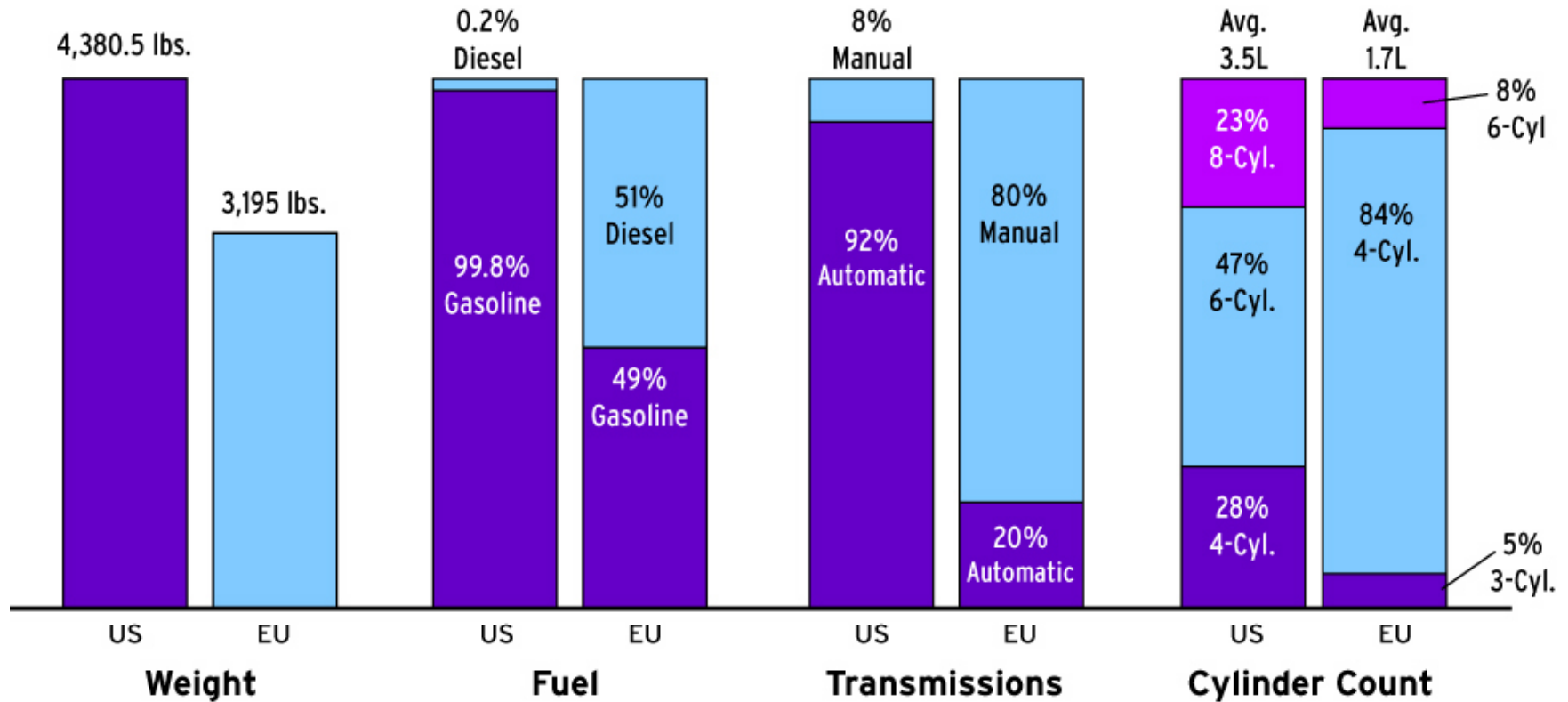


Source: NAHB

1980 – Avg. age of vehicles 6.6 years / 2007 Avg. age of vehicles 9.2 years ↑ 39%



# Autos in Europe (\$6/gallon gas = 36 m.p.g.) vs. United States (\$3/gallon gas = 21\* m.p.g.)

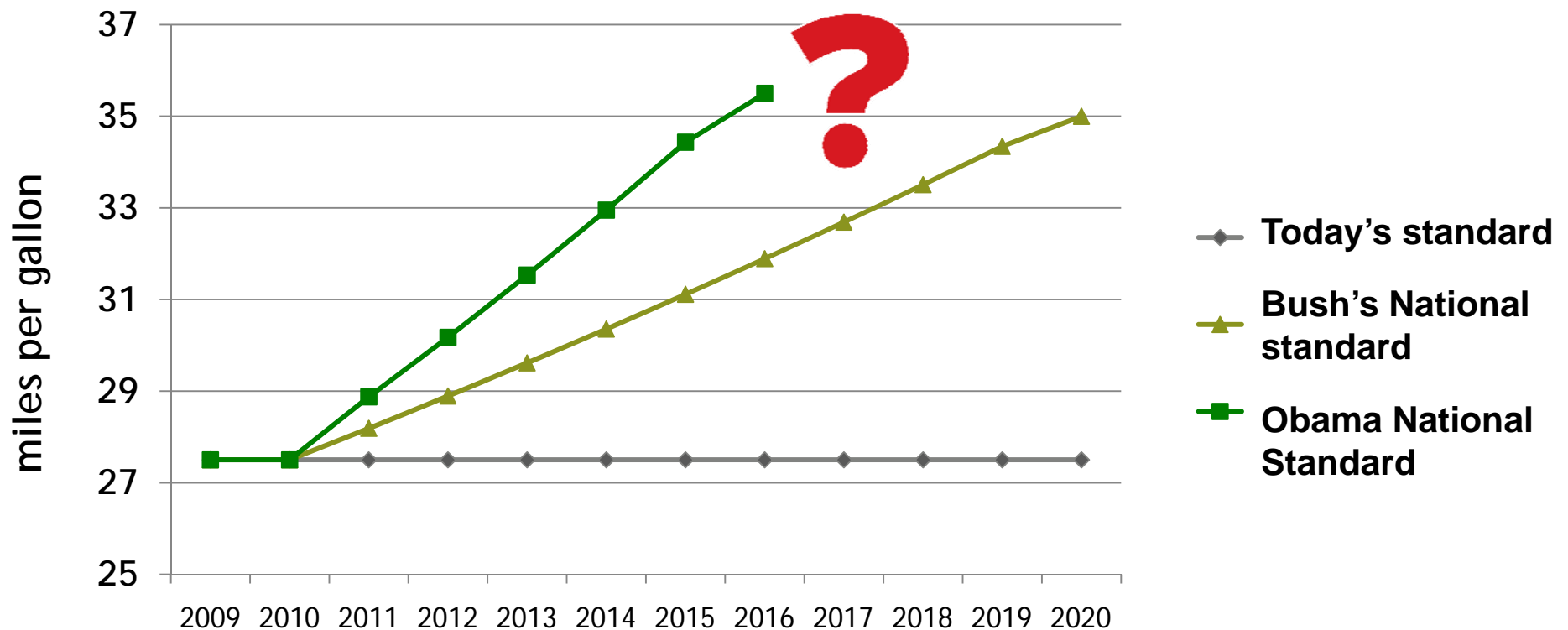


\*Adjusted fuel economy

Source: EPA

# Café New Horizon

The Obama National Standard will require ambitious technology strategies.



- Reducing oil consumption by 1.8 billion barrels.
- Lowering GHG emissions by over 900 million metric tons.

# Consumers Perspective

|                                     | Technology Price | Fuel Economy | Range | Fuel Availability |
|-------------------------------------|------------------|--------------|-------|-------------------|
| Direct Gas Injected/<br>Turbo Green | ●                | ●            | ●     | ●                 |
| Diesel                              | ●                | ●            | ●     | ●                 |
| Hybrid                              | ●                | ●            | ●     | ●                 |
| E-85                                | ●                | ●            | ●     | ●                 |
| CNG                                 | ●                | ●            | ●     | ●                 |
| Plug in Hybrid                      | ●                | ●            | ●     | ●                 |
| Electric w/<br>Range Extender       | ●                | ●            | ●     | ●                 |
| Hydrogen                            | ●                | ●            | ●     | ●                 |



**Q&A**  
**DISCUSSION**