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SCR, 1. Selective Catalytic Reduction:
one of the most cost-effective and fuel-efficient vehicle emissions control technologies capable of reducing emissions to near-zero levels.

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**NEW VOCATIONAL FUEL AND FLUID FILLING PRACTICE STUDY
HELPS SCR STAKEHOLDERS PLAN FOR EPA 2010 EMISSIONS TECHNOLOGIES &
RAMP-UP OF DEF INFRASTRUCTURE**

*Study Shows 80 Percent of Vocational Fleets Served by Truck Stops & Retail Service Stations
with New Growth Opportunities for Packaged DEF at Retail Chains & Convenience Stores*

GREENSBORO, N.C. – October 2009 – With weeks to go before the new EPA 2010 emissions standard for commercial vehicles and diesel engines goes into effect, a national research study of vocational trucks (classes 3-8) conducted by Quixote Group Research indicates that nearly 80 percent of the vocational market for diesel exhaust fluid (DEF) will be served by supplies at truck stops and retail service stations. The study also shows new opportunities for growing supply and distribution of DEF among automotive retail chain stores and fleet base refilling operations, as well as dealer service networks, independent service centers, card key lots, worksite and mobile refueling operations.

The objective of the research was to determine fueling, service and maintenance, and fluids and chemicals purchase patterns for vocational trucks to better understand the distribution requirements for diesel exhaust fluid. The study was conducted on behalf of more than 300 original equipment manufacturers (OEM), DEF supply companies and related organizations involved in the North American SCR Stakeholders Group, an ad-hoc alliance committed to the introduction of selective catalytic reduction (SCR) technologies for meeting 2010 emissions standards.

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According to all vocational survey respondents, service, repairs and maintenance are most often done at company owned sites, while 46% of the industry refuels at retail service stations. This reflects the potential role for retail service stations in DEF refilling. Among class 3-5 vehicle operators and fleets, retail service stations are particularly important - 71% currently refuel at retail service stations regularly. Those involved in construction and distribution & services may also prefer to get DEF at retail service stations as more than 50% go to that channel to refuel.

New opportunities for DEF distribution also exist among automotive retail chains, like NAPA and AutoZone. Among vocational survey participants, 42% of government fleets say they purchase fluids and chemicals at automotive retail chain stores, while 50% of class 3-5 operators say they regularly go to automotive retail chain stores for fluid and chemical supplies.

Company owned facilities will play a role in DEF refilling as well. Among government fleets, over 80% of all fueling, maintenance and fluid refills are handled at base facilities. Results among other vocational sectors, including construction, petroleum and bulk transport in particular, show company owned facilities could serve as much as 67% of DEF refilling needs (based on current practices and service capacity) as the DEF supply infrastructure matures.

Most truck and engine manufacturers will use selective catalytic reduction in their 2010 models to meet emissions standards set by the U.S. Environmental Protection Agency nearly a decade ago. SCR technologies require DEF, 67.5% distilled water and 32.5% urea, which enables a chemical reaction within a catalyst to reduce nitrogen oxide (NOx) emissions to below 0.2 grams per brake horsepower-hour. SCR delivers up to 5% fuel efficiency and virtually eliminates NOx.

The research was conducted by Quixote Group - an independent market research and analysis firm with extensive experience in trucking, emissions technology and diesel exhaust fluid industries. Results were presented by Chuck Mattina, president of Quixote Group, at the 2009 Diesel Exhaust Fluid Forum in October. Study data came from an online survey designed by Quixote Group fielded among *Heavy Duty Trucking* magazine subscribers in late July 2009.

Respondents represent a cross-section of vocational segment operations including: construction (14.8%); distribution & services (32.1%); government (9.7%); TL/LTL (9.5%); petroleum (6.1%); specialized hauling (15.4%); and, bulk transport (6.9%). A total of 1,609 responses were collected, resulting in a margin of error of $\pm 2.4\%$.

About the North American SCR Stakeholders Group:

The Group represents more than 300 public and private organizations, including government agencies, automotive and heavy-duty engine and truck manufacturers and trade associations, fuel retailers and truck stop trade associations, chemical and oil companies, diesel exhaust fluid producers, distributors and dispensing equipment manufacturers. Creating awareness for SCR as the most fuel efficient and effective emissions technologies available is one of the primary objectives for the SCR Stakeholders Group. For more information, please visit www.FactsAboutSCR.com or www.TruckSCR.com.

About Quixote Group Research:

Based in Greensboro, N.C., Quixote Group is a strategic research and marketing firm comprised of trend and market analysts and communications specialists. As a research-centric organization, Quixote Group specializes in building and growing its clients' brands by developing, communicating and demonstrating their strategic value to target audiences. For more information, please visit www.quixotegroup.com.