

2014 OEM Survey of Alliance & Backer Members Toplines

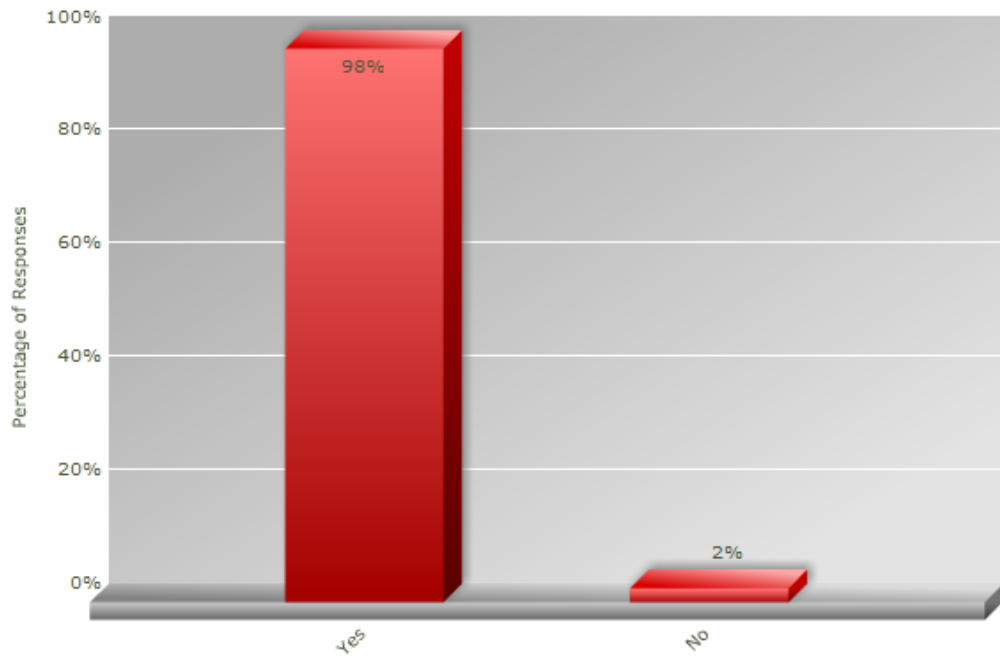
This survey of the National Biodiesel Board's Alliance and Backer members sought to gain their input on their experiences with biodiesel. Following the bullet points below are individual results for each question with charts and graphs.

- Sent to the National Biodiesel Board's Alliance & Backer members in North America
- Reason for support: Energy security and environmental & health benefits continue to be the top messages and reasons for support of biodiesel. Renewable fuel was a new message/reason and was the top reason for support (96%). Economic benefits dropped significantly as a reason for support (53%)
- The least important reason for support was "Meets Federal/State mandates or incentives"
- The most popular blend level used by respondents is B100
- The factor that most motivates respondents to use biodiesel is domestic energy security
- The main factor listed as a reason for not using a higher biodiesel blend was fuel availability
- 81 percent of respondents were much more or somewhat more likely to buy from an automaker that supports B20
- 99 percent of respondents would recommend biodiesel use to others

Question: Do you currently own one or more on-road diesel vehicle?

Answer	Percentage	Number
Yes	98 %	119
No	2 %	3

Number of Respondents: 122



Question: You indicated you own at least one diesel vehicle. Please list the Make, Model and Year of the vehicle. (You may enter a second diesel vehicle below. If you manage a fleet of diesel vehicles, choose the two most common in your fleet))

Answer	Percentage	Number
Audi	1 %	1
BMW	1 %	1
Chevrolet	3 %	4
Ford	11 %	13
Freightliner	3 %	4
GMC	2 %	2
International	2 %	2
Isuzu	1 %	1
Jeep	5 %	6
Mercedes-Benz	12 %	14
Ram	6 %	7
Thomas Built	1 %	1
Volkswagen	50 %	58
Other	1 %	1
Number of Respondents: 115		

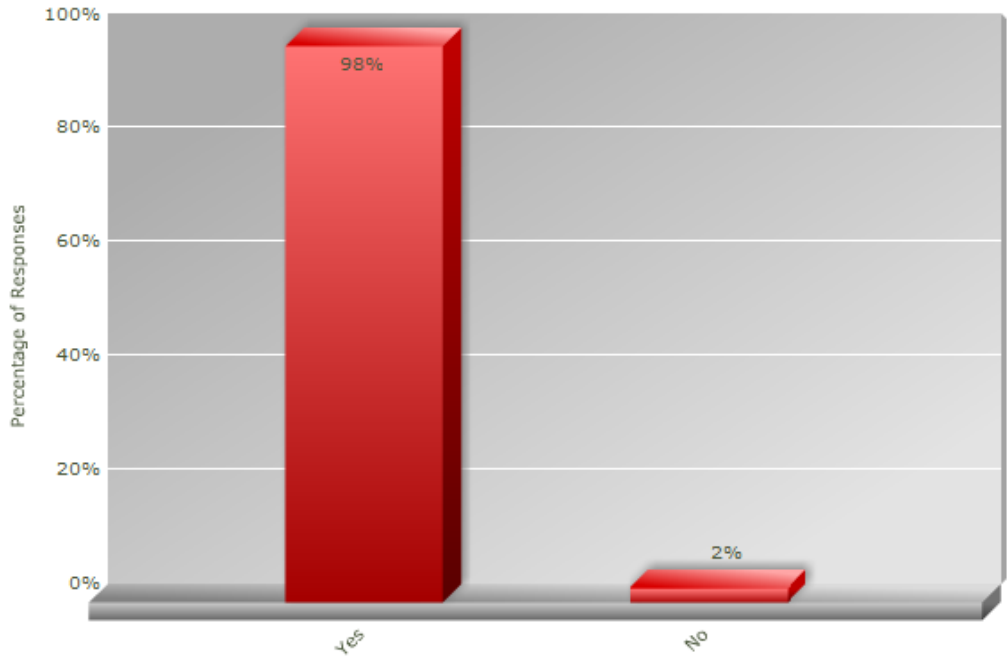
2nd vehicle

Answer	Percentage	Number
Chevrolet	2 %	1
Ford	2 %	1
Freightliner	10 %	5
IC Bus	2 %	1
International	4 %	2
Jeep	6 %	3
Mercedes-Benz	12 %	6
Peterbilt	2 %	1
Ram	6 %	3
Volkswagen	48 %	24
Other	6 %	3
Number of Respondents: 50		

Question: Do you currently use or have you ever used biodiesel blends in your diesel vehicle(s)?

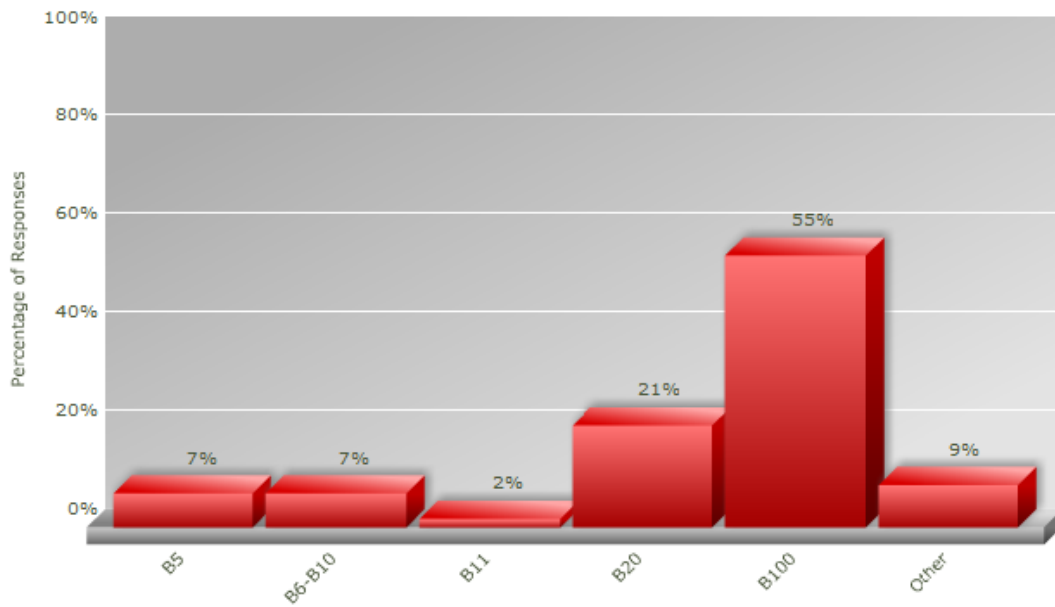
Answer	Percentage	Number
Yes	98 %	119
No	2 %	3

Number of Respondents: 122



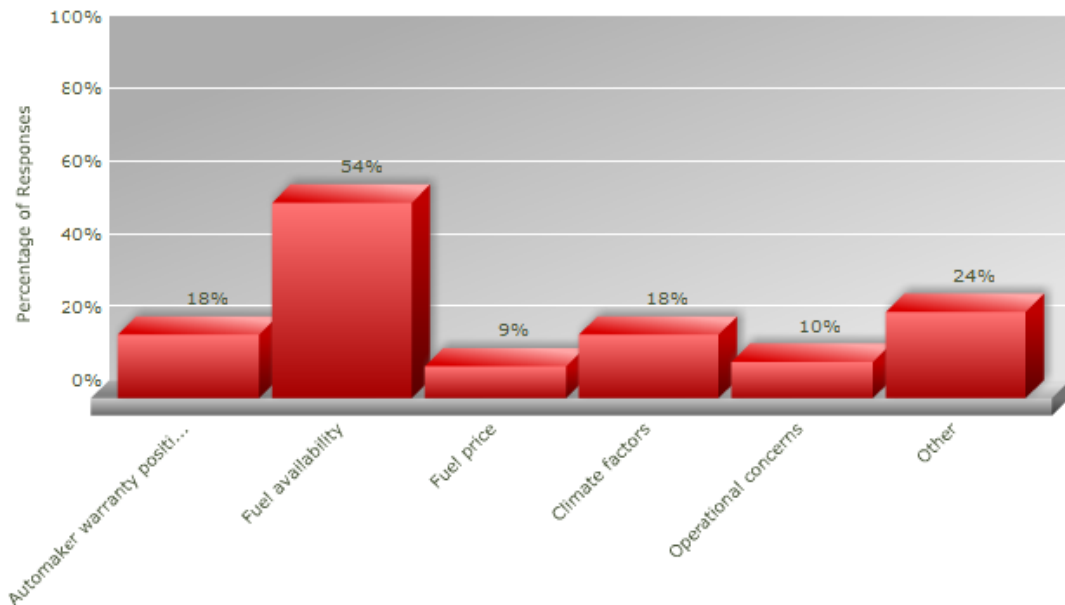
Question: You indicated you use biodiesel blends. Which biodiesel blend(s)?

Answer	Percentage	Number
B5	7 %	8
B6-B10	7 %	8
B11	2 %	2
B20	21 %	24
B100	55 %	64
Other: B40 to B100	1 %	1
Other: B50	1 %	1
Other: B50 and above	1 %	1
Other: B80	2 %	2
Other: B99	3 %	3
Other: from B20 to B100	1 %	1
Other: home made	1 %	1
Number of Respondents: 116		



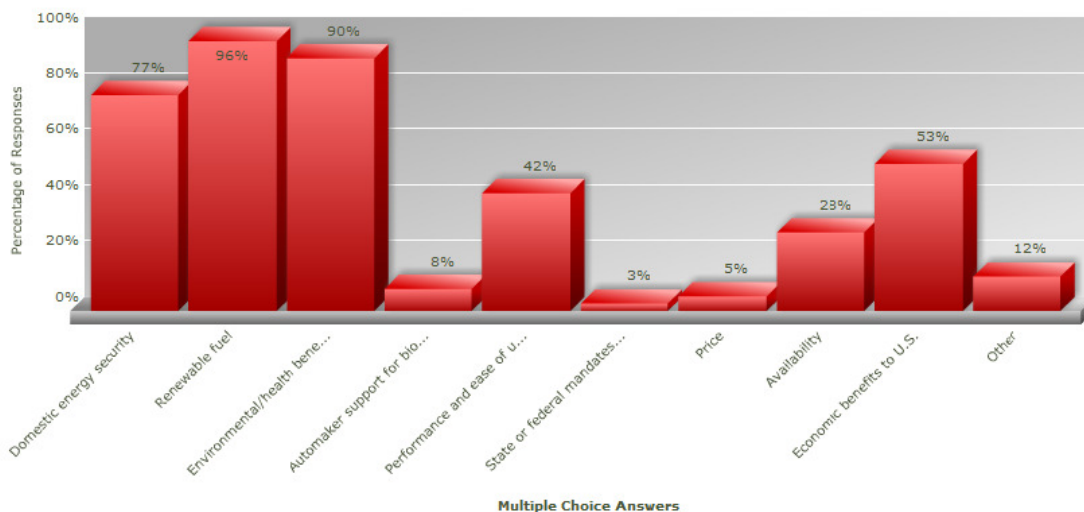
Question: What factors, if any, are preventing you from using higher biodiesel blends at this time?

Answer	Percentage	Number
Automaker warranty position	18 %	14
Fuel availability	54 %	43
Fuel price	9 %	7
Climate factors	18 %	14
Operational concerns	10 %	8
Other:	1 %	1
Other: air quility need to improve	1 %	1
Other: emission system incompatible with B100 use	1 %	1
Other: Fuel lines - I need to replace them with Viton tubing	1 %	1
Other: I can't get more than B100 :-)	1 %	1
Other: I use as high as weather will allow	1 %	1
Other: I will only use high blends of biodiesel. I have been using B100 for over 10 years!	1 %	1
Other: I would buy a newer vehicle if the DPF issue with high Bio blends was fixed	1 %	1
Other: MBZ would go into "Limp" mode which is amazingly dangerous (esp. on the frwy)!	1 %	1
Other: Misguided government: policy	1 %	1
Other: More smoke, lower fuel economy	1 %	1
Other: N/A	1 %	1
Other: NA	1 %	1
Other: oil dlution in TDI engine	1 %	1
Other: only winter weather prevents high blends	1 %	1
Other: reduced vehicle mileage	1 %	1
Other: Sometimes I needed to use B50 during the coldest parts of the winter	1 %	1
Other: using it currently	1 %	1
Other: Very satisfied with this blend	1 %	1
Number of Respondents: 80		



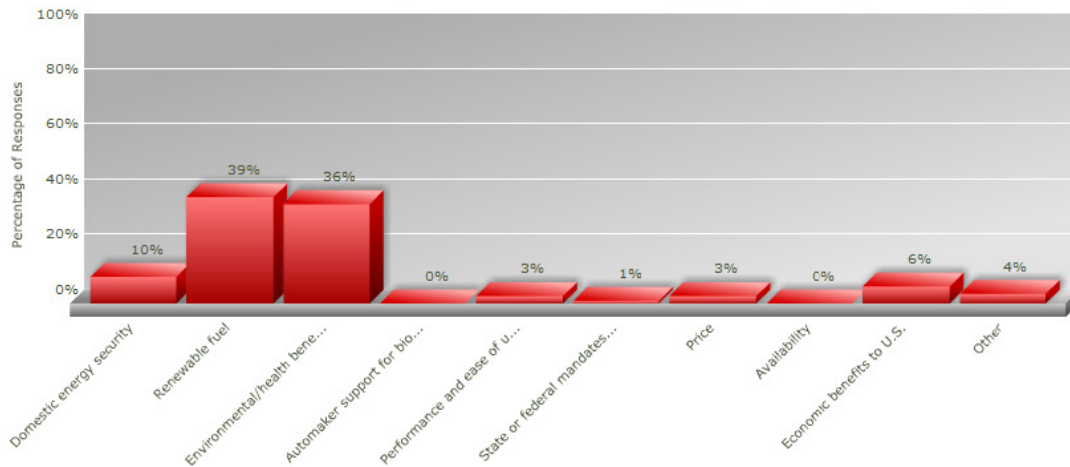
Question: There are many motivating factors for using biodiesel blends. Please indicate which factors below primarily motivate you to use biodiesel.

Answer	Percentage	Number
Domestic energy security	77 %	88
Renewable fuel	96 %	110
Environmental/health benefits	90 %	103
Automaker support for biodiesel	8 %	9
Performance and ease of use	42 %	48
State or federal mandates or incentives	3 %	3
Price	5 %	6
Availability	28 %	32
Economic benefits to U.S.	53 %	60
Other:	1 %	1
Other: Benefit to local economy	1 %	1
Other: Economic benefits to my local area	1 %	1
Other: good for engines	1 %	1
Other: i like the smell	1 %	1
Other: I will always use biodiesel blends whether an Automaker supports the high blend or not. I don't feel like there is any reason not to be using the highest blend possible.	1 %	1
Other: Local jobs	1 %	1
Other: no war required	1 %	1
Other: NOT Automaker support - there doesn't seem to be any.	1 %	1
Other: Smell	1 %	1
Other: soybean farmer benefit	1 %	1
Other: support local economy	1 %	1
Other: Support local producer using WVO for feedstock	1 %	1
Other: We need to be a non-oil economy	1 %	1
Number of Respondents: 114		



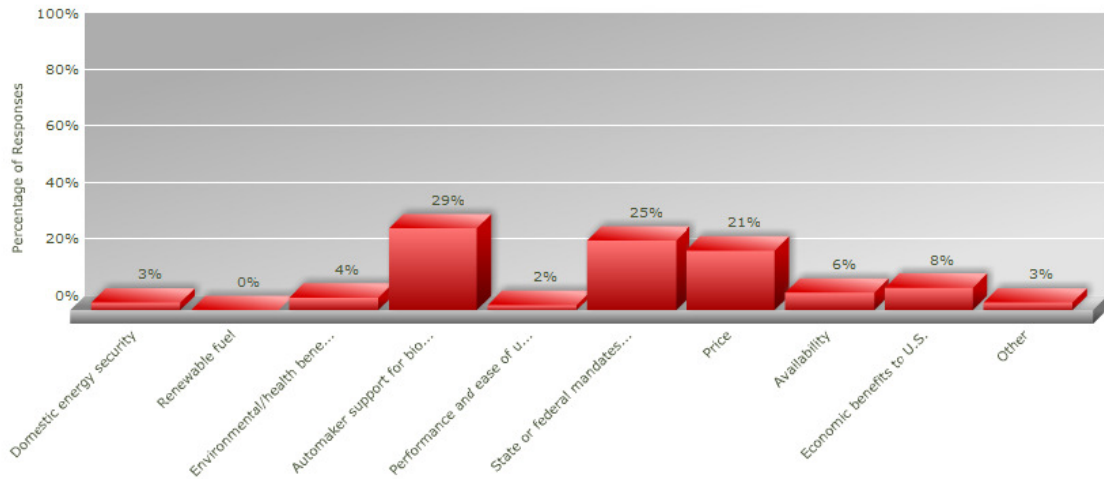
Question: Now, for the same reasons for biodiesel support you rated above, which reason would you say is your MOST important reason for support?

Answer	Percentage	Number
Domestic energy security	10 %	11
Renewable fuel	39 %	44
Environmental/health benefits	36 %	41
Performance and ease of use	3 %	3
State or federal mandates or incentives	1 %	1
Price	3 %	3
Economic benefits to U.S.	6 %	7
Other: Good for the vehicle.	1 %	1
Other: Local energy security- WVO biodiesel	1 %	1
Other: smells good	1 %	1
Other: support soybean producers	1 %	1
Number of Respondents: 114		



Question: Now, for the same reasons for biodiesel support you rated above, which reason would you say is your LEAST important reason for support?

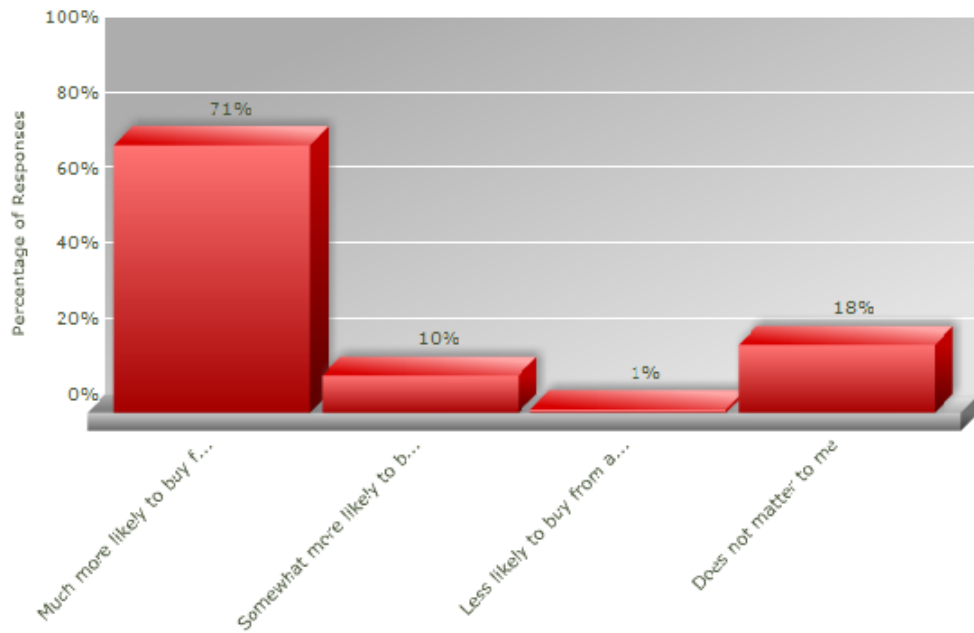
Answer	Percentage	Number
Domestic energy security	3 %	3
Environmental/health benefits	4 %	5
Automaker support for biodiesel	29 %	33
Performance and ease of use	2 %	2
State or federal mandates or incentives	25 %	28
Price	21 %	24
Availability	6 %	7
Economic benefits to U.S.	8 %	9
Other:	1 %	1
Other: Again, I will use B100 even if the manufacturer only supports B5.	1 %	1
Other: none	1 %	1
Number of Respondents: 114		



Question: Currently, all automakers selling diesel vehicles and equipment in the U.S. support the use of at least B5 biodiesel blends, and 78 percent of automakers support the use of B20 or higher blends in at least some of their equipment. Does an automaker's position on biodiesel affect your purchasing decision for their vehicles?

Answer	Percentage	Number
Much more likely to buy from an automaker that supports B20	71 %	79
Somewhat more likely to buy from an automaker that supports B20	10 %	11
Less likely to buy from an automaker that supports B20	1 %	1
Does not matter to me	18 %	20

Number of Respondents: 111



Would you recommend biodiesel use to others?

Answer	Percentage	Number
Yes	99 %	111
No	1 %	1

Number of Respondents: 112

