



Investor Presentation

April 12th, 2021



Westport Fuel Systems

Forward Looking Statements

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Westport Overview

- JV with Cummins in North America
- JV with Weichai Power in China
- Steep HPDI sales ramp in EU with initial launch partner Volvo
- Products delivered to OEMs and through our global network of Independent After Market Distributors

- We are the world's leading supplier of advanced gaseous fuel systems and components for the global automotive industry
- Our patented HPDI 2.0™ systems deliver lower-cost operations for heavy duty fleets, significantly reduces carbon footprint without performance compromise vs diesel
- Clean and cost-effective solutions for passenger cars and light-duty vehicles are particularly compelling in cost-sensitive markets like Italy, Turkey, Egypt, Poland, Russia, and growing in China & India
- Complies with stringent emissions standards in EU, China, India
- 2020 Revenue of \$252 million, and poised for growth



1,400
Patents &
Applications



>100
Global Distributors



Manufacturing
7 Global Locations



Renewable
Alternative Fuels

Macro Trends Driving Our Growth



Regulation

- European CO₂
 - HD: -15% / -30%
 - LD: -33% / -50%
- China VI
- Indian BS-VI
- US 2027 GHG II



Affordability

- Affordability enables scale
- To address urban air quality concerns
- And respond to ramping demand due to population growth and economic development



Fuel Availability

- China has the largest existing infrastructure with 6,500 LNG stations
- Europe expanding rapidly (LPG, CNG, and LNG)
- India plans 10,000 CNG stations this decade



Renewables

- The “ready now” low carbon, low GHG alternative fuel
- Shell building 50 carbon neutral LNG stations in Germany



Product Availability

- Production solutions available NOW (not demonstrations)
- We don't have to wait to address demands for clean affordable transportation

The background of the slide is a dark blue image of a winding road at night, with light trails from vehicles creating a sense of motion. The road curves into the distance, flanked by dark, silhouetted hills or trees.

Stringent Regulatory Frameworks Driving Real-Time Market Response

HPDI Delivers CO₂ Emission Reductions Now

Europe (from 2019 baseline):

- 15% CO₂ required by 2025
- 30% CO₂ required by 2030

United States:

- Up to 25%* CO₂ reduction from 2017 through 2027



The only commercially viable, cost-competitive Heavy Duty Trucking technology solution available today to meet stringent EU, China, India regulations

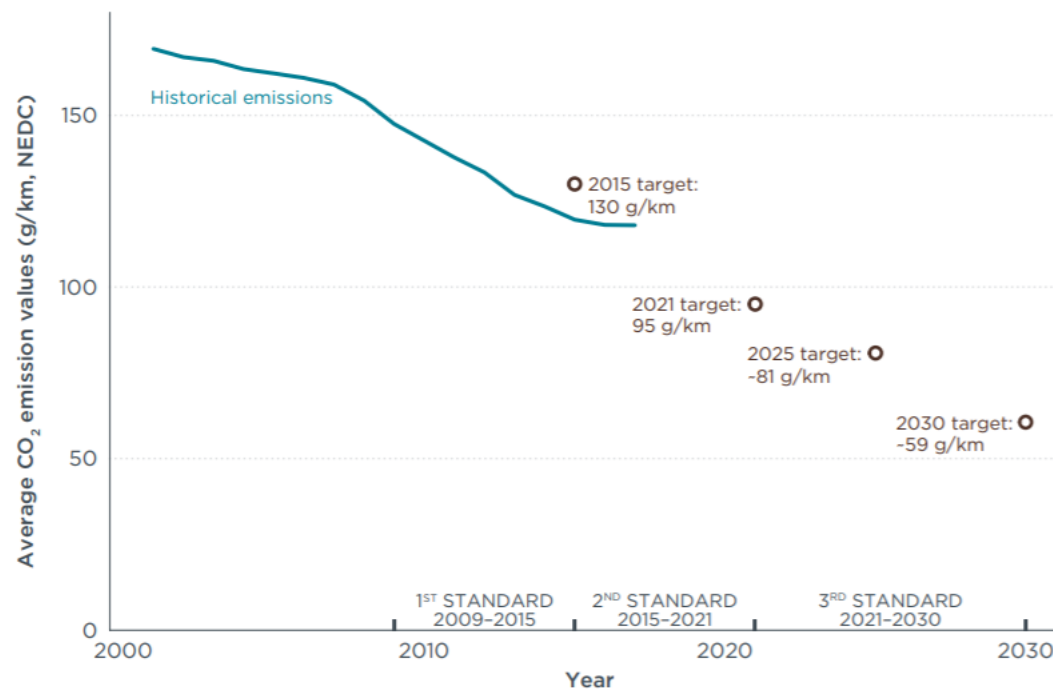
- HPDI 2.0 reduces CO₂ more than
 - *the 2025 EU requirement using Fossil LNG*
 - *the 2030 EU requirement using just 20% Renewable Natural Gas*
- Penalty for non-compliance in EU is €4,250 per gram/ton-km starting in 2025
 - *Penalty up to €38,000 per truck*
- Preserves substantial OEM investments
- Purchase incentives up to €20,000 for LNG trucks make already compelling economics more attractive

* Varies by vehicle class and application

Natural Gas Offers OEMs a Compliance Pathway for Europe's Light-Duty Emission Standards

- EU represents ~ 70% of our sales
- CNG vehicle registrations and infrastructure continue to grow

The EU's stringent regulations for passenger cars/vans requires a ~33% reduction in CO₂ emissions in 2025 and ~50% in 2030 compared to 2018.

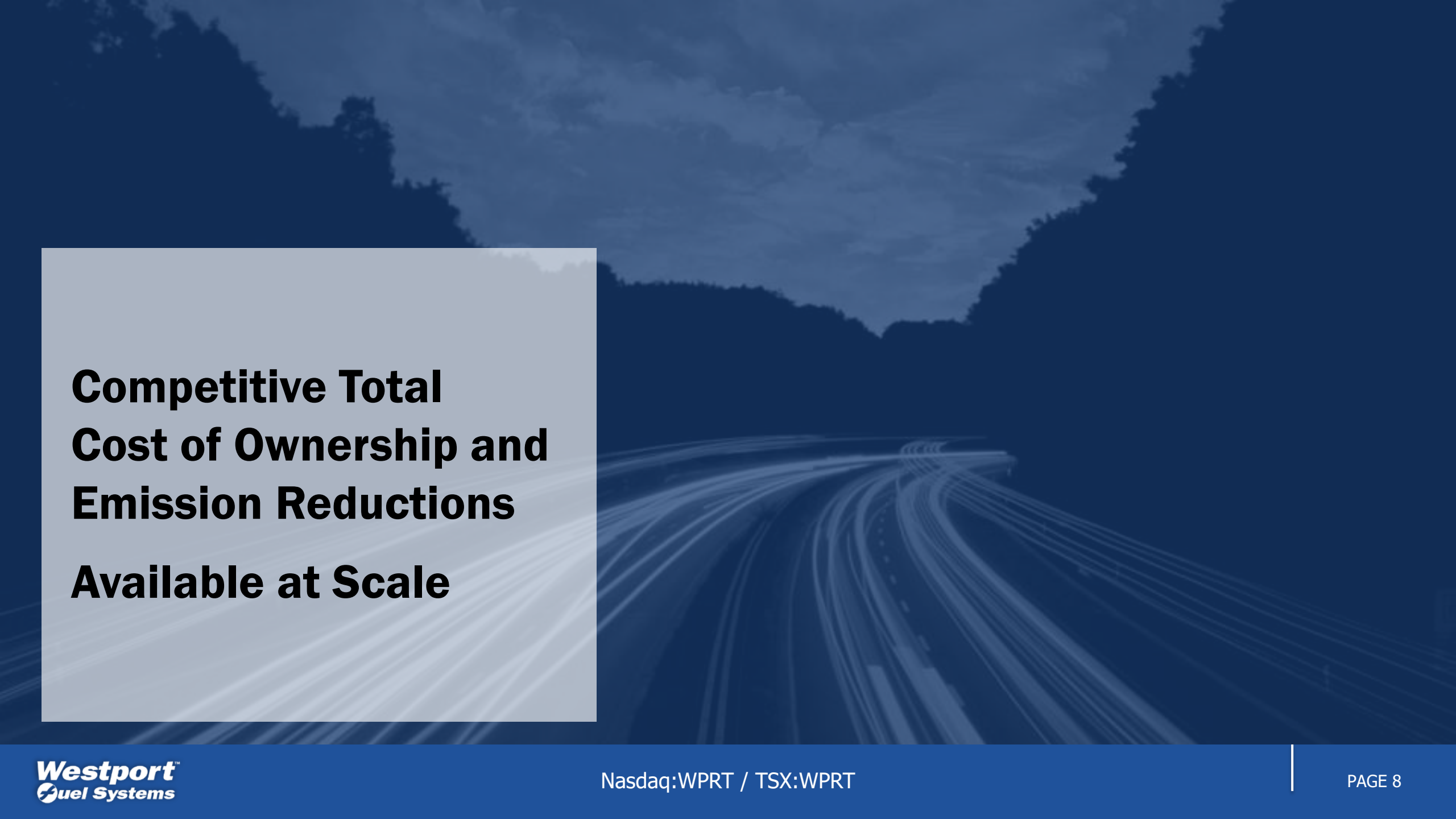


Penalties are set at €95 for each g/km above the target from 2025.

Collectively, the industry trajectory is 20g/km over the target, which would result in an average penalty of €1,900 per vehicle.

Average historical CO₂ emission value and adopted CO₂ standards for new passenger cars in the EU (2019)

Source: https://www.theicct.org/sites/default/files/publications/EU-LCV-CO2-2030_ICCTupdate_20190123.pdf and <https://www.eea.europa.eu/highlights/average-co2-emissions-from-new>

The background of the slide is a dark blue image of a road winding through a forest. The road is illuminated by long, white, curved light trails, suggesting motion or speed. The sky is dark and cloudy.

Competitive Total Cost of Ownership and Emission Reductions Available at Scale

Total Cost of Ownership and Emission Reductions

Passenger Cars			
	Petrol	LPG	CNG
Incremental price per vehicle		€1,000	€1,500
Fuel cost (€/litre or kg)	€1.50	€0.65	€0.95*
Annual distance (km)	20,000	20,000	20,000
Fuel consumption (km/l or kg)**	12	11	21
Annual fuel cost	€2,500	€1,200	€900
Annual Fuel Cost Savings		€1,300	€1,600
Payback (months)		9	11
CO ₂ Emission Reductions (%)***		~20%	~25%

Heavy-Duty Trucks	
Diesel	HPDI LNG
	€40,000
€1.36	€0.95*
120,000	120,000
3.3	4.8
€49,000	€23,900
	€25,100
	19
	~20%

The actual payback period is dependent upon vehicle transaction prices, annual distance traveled, fuel prices and the impact of taxes and incentives. All of these factors can vary over time and between jurisdictions.

FOR ILLUSTRATIVE PURPOSES ONLY

* Euro 0.95/kg = 0.684 Euro/m³

** Average European car

*** Emission reductions greater with blends of renewable gas

HPDI 2.0™ – Commercially Available and Viable Now

- Regulations and total cost of ownership are expected to drive growth
- Same torque and efficiency as diesel engine with reduced CO₂ emissions
- No change to engine or vehicle architecture

Long Haul HD Truck Application	Diesel	Westport HPDI 2.0™	Battery Electric	Hydrogen FCV
Meet EU 2025/2030 requirements?	X	✓	✓	✓
Meet customer requirements? • Range, payload, performance, durability • Operations, refuel/recharge time	✓	✓	X	X
Refueling infrastructure?	✓	✓	X	X
Commercially available and viable?	✓	✓	X	X
Total Cost of Operation	<u>Baseline</u>	<u>Lower</u>	<u>Higher</u>	<u>Higher</u>

Future Heavy-Duty Transportation Fuel and Technology Mix

Difference Compared to Diesel

Heavy Duty Truck, 400 mile daily range @ current costs and technologies:

Fuel System	Fuel Storage Size <i>(cubic feet)</i>	Fuel + Storage Weight <i>(pounds)</i>	Propulsion System Cost <i>(approximate)</i>	Daily Fueling Time <i>(minutes)</i>	Daily Fuel Cost <i>(US West Coast)</i>
Spark Ignited CNG	5X	+550	+\$40,000	+5	-\$20
HPDI	3X	+700	+\$50,000	Same	-\$50
H2 Fuel Cell	6X	+950	+\$110,000	+10	+\$100
Battery Electric	15X	+17,500	+\$300,000	+70 (@ 700kW) +470 (@ 120kW)	-\$70

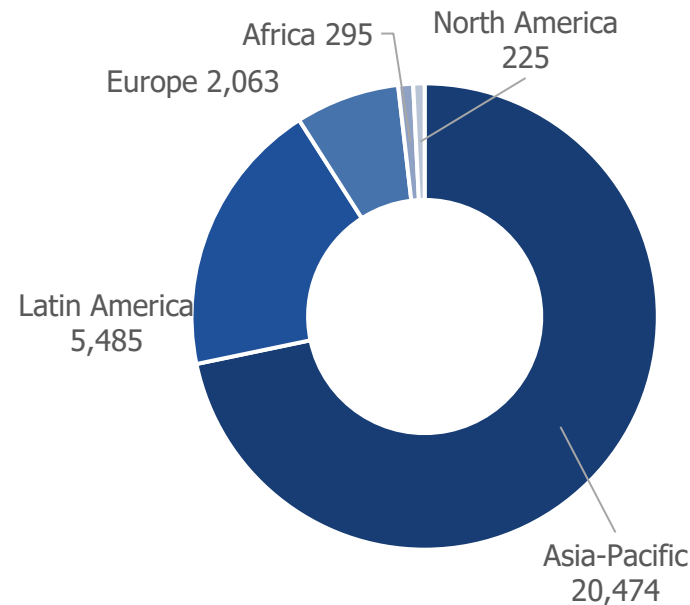
For long-haul commercial vehicle applications which require extended range, battery electric and fuel cell technologies are not commercially available, nor economically viable.

Information based on latest estimates from multiple industry sources and may vary

Global Overview of Natural Gas and LPG Vehicles

- 55 million natural gas and LPG vehicles are currently in service, with about 1.5 million new vehicles or conversions sold annually
- 70% of our sales currently in EU, Asia Pacific represents a massive opportunity

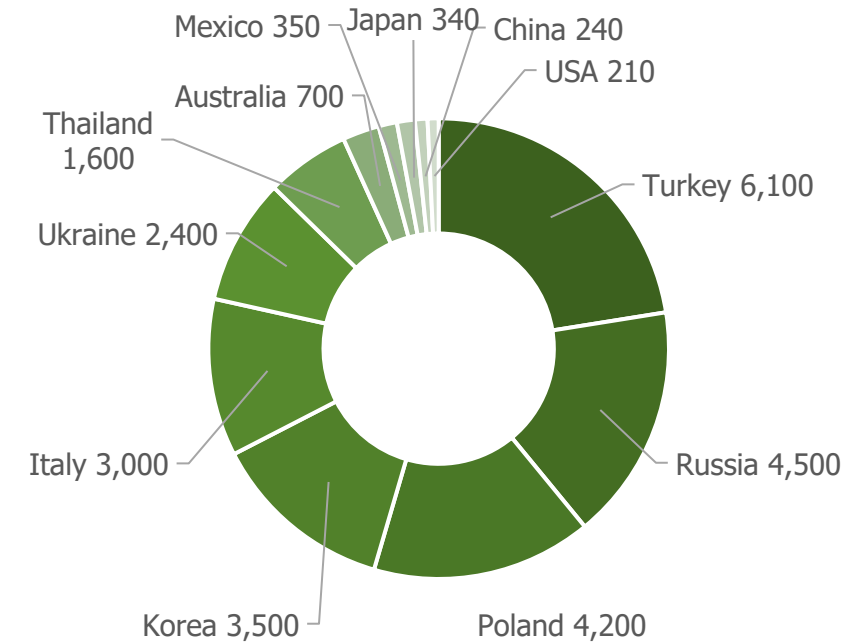
Natural Gas Vehicles in Service (in thousands)



Total: 28.5 million

Source: NGV Global December 31, 2019

Liquid Propane Gas Vehicles in Service (in thousands)



Total: 27.1 million

Source: World LPG Association 2018 Annual Report, WFS analysis

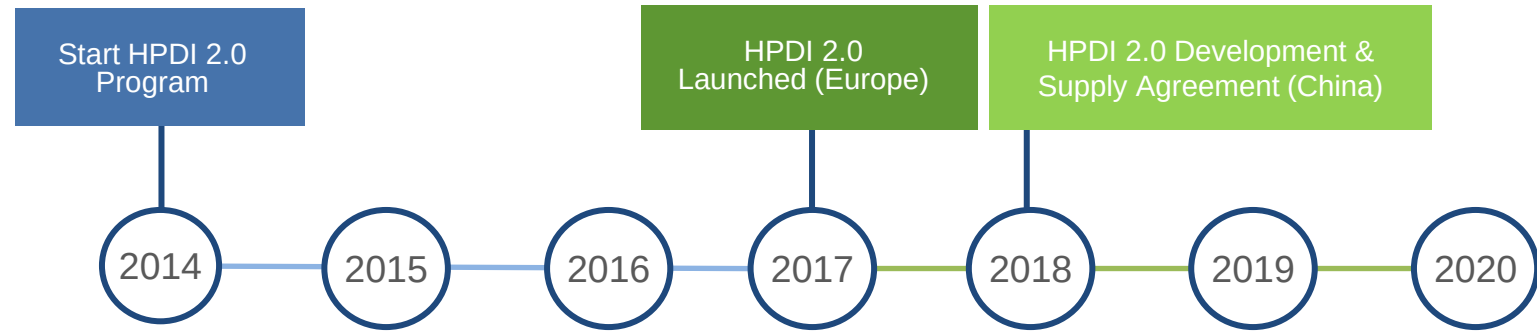


The background of the slide is a dark blue image of a road winding through a forest. The road is illuminated by long, white, curved light trails, suggesting motion or a long-exposure photograph. The trees on either side are dark and silhouetted against a lighter sky.

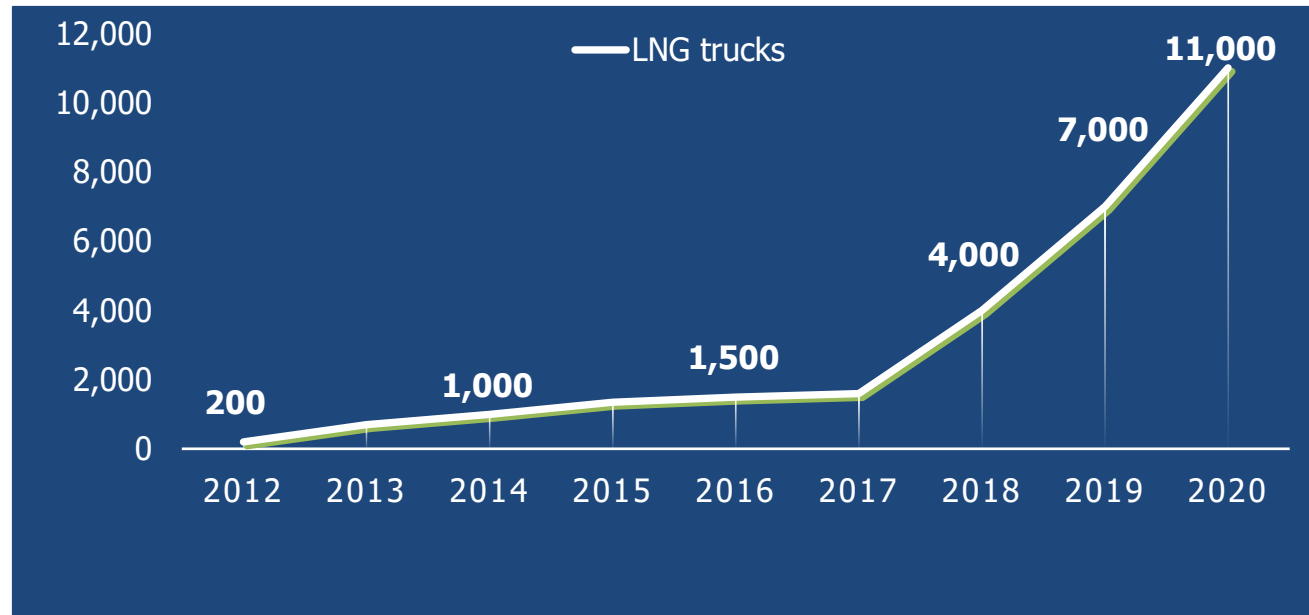
Clean, Market-Ready, and Sustainable on- Road Transportation Solutions in Lucrative Geographic Markets

LNG for Heavy-Duty Trucking Scaling in Europe

- LNG truck registrations more than doubled since 2017
- OEM revenue up 32% in Q4 2020 vs same period 2019, largely due to HPDI sales volumes



Heavy-Duty Natural Gas Trucks >400hp in Operation in Europe



- Four engines >400 hp
- Three OEMs
- Commercially available in Europe

Source: NGV Europe (2020) Available at <https://www.ngva.eu/>

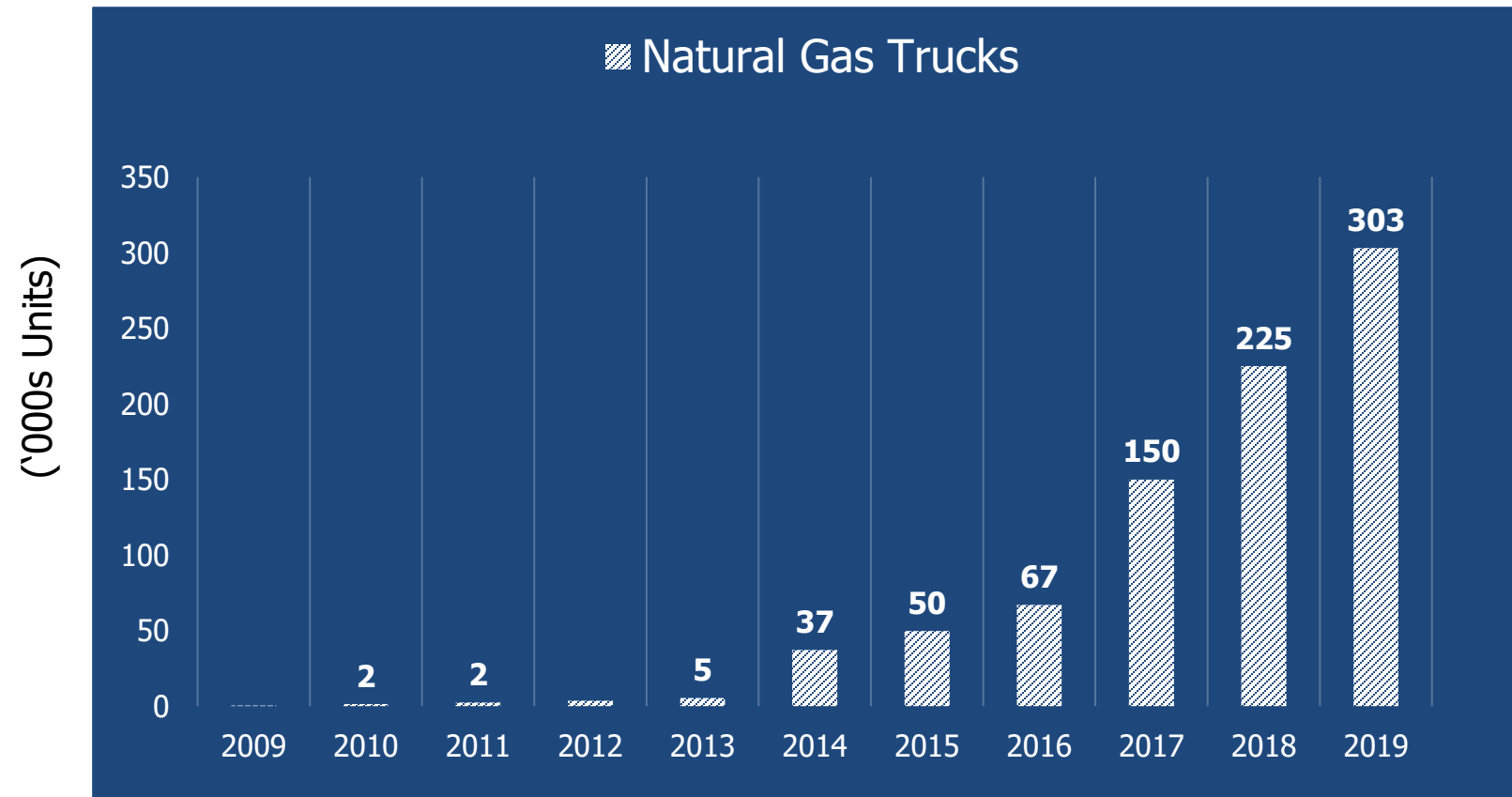
Source: PSR (2020) and Analysis by WFS

China: World's Largest Natural Gas Truck Market

- World's largest truck market ~1.2 million vehicles/year
- ~10% of market is LNG fueled trucks
- LNG costs ~35 to 55% less than diesel
- 12,000 LNG refueling stations
- Weichai JV received certification of HPDI-equipped engine; next step is vehicle certification by OEMs
- Class 7 and 8 HD natural gas vehicles offered by 40 OEMs
- Our partner is the leading supplier of engines
- HPDI outperforms spark ignited products currently offered in this market

Source: PSR Database and WFS Analysis (2019)

Natural Gas Trucks in Operation in China (2009 – 2019)



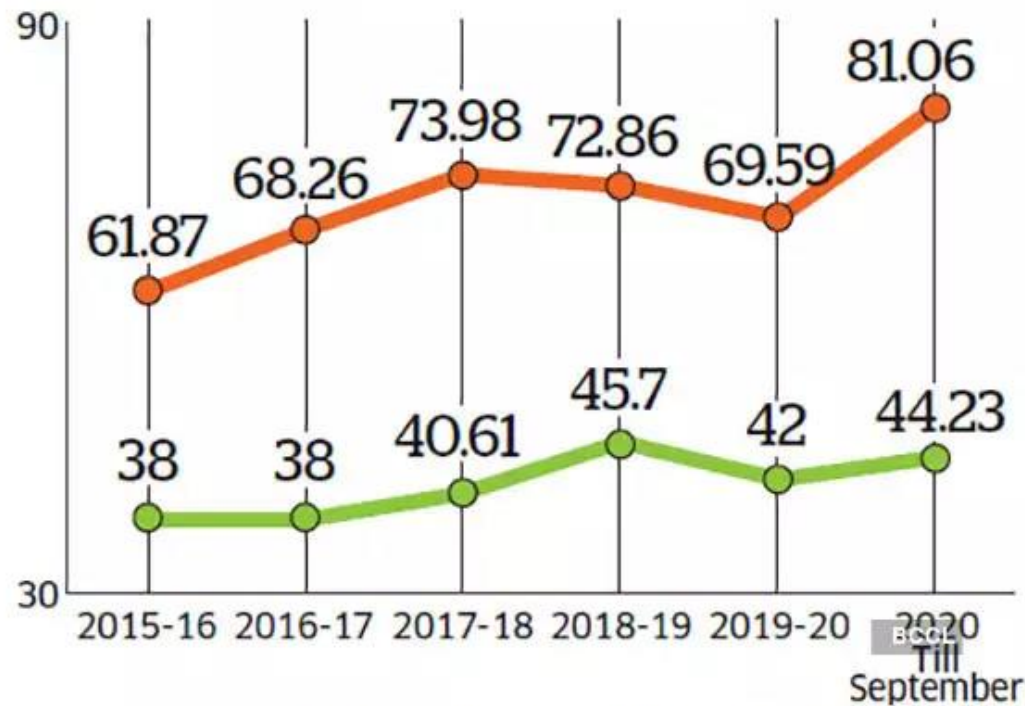
Growing Market Opportunity: India

- Government plans to raise share of natural gas in India's energy mix from 6.5% to 15% by 2025
- Government plans to invest \$1.4 billion in the next three years to construct up 1,000 LNG stations
- Due to Bharat VI emissions standards, diesel engines being replaced by more affordable CNG vehicles
- Cost conscious consumers, high diesel costs create impetus for affordable alternative fuel choices

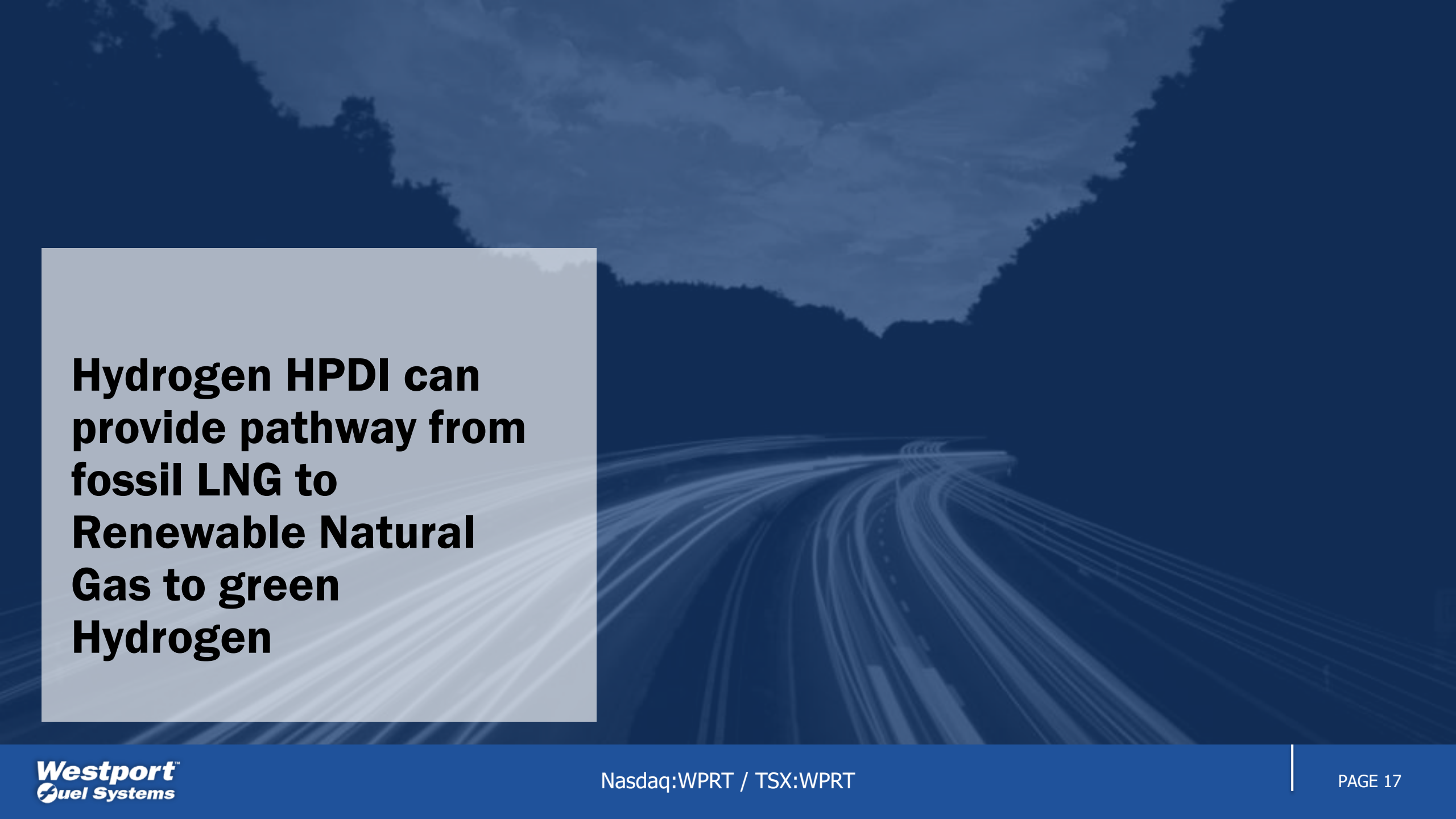
Source: Enfuse India Available at <https://www.enfuse.org>

FUEL PRICE

■ CNG price/kg ■ Petrol price/litre
figures in ₹



Note: Average price in India | Source: Maruti Suzuki

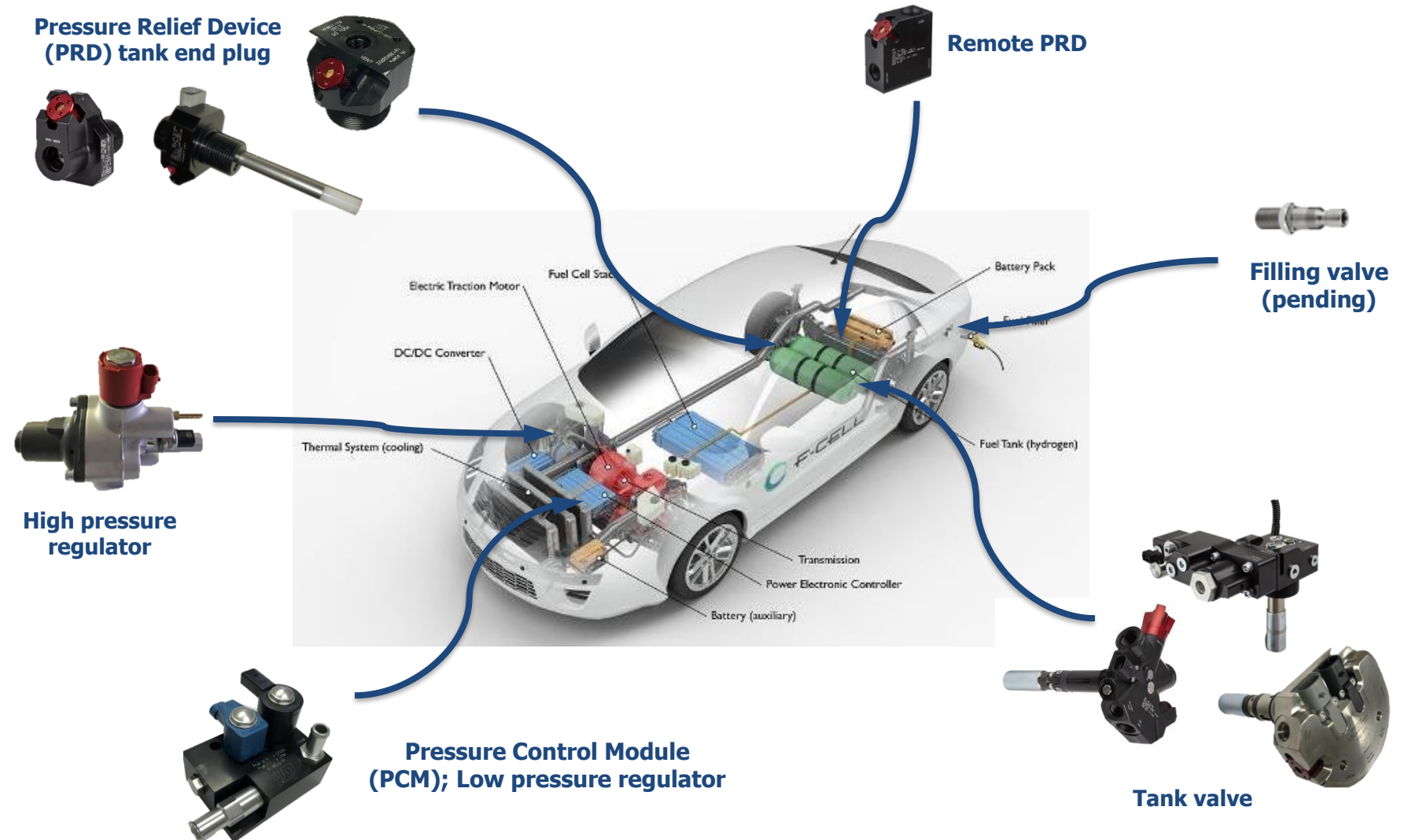


**Hydrogen HPDI can
provide pathway from
fossil LNG to
Renewable Natural
Gas to green
Hydrogen**

Hydrogen Capabilities Today



- Pioneer in H₂ components supplied under GFI brand
- Full portfolio of H₂ components
- Supplier to Ballard, Plug Power and others
- 350 bar pressure: > 40% market share for tank valves
- 700 bar pressure: market shifting in this direction
- MD/HD/Bus/Industrial primary segments; automotive in some countries



Hydrogen HPDI



Combustion modelling shows efficiency comparable to fuel cells in heavy duty applications



Total cost of ownership analysis indicates significant cost advantage versus fuel cells



First engine testing completed, verifies modelling



Lower manufacturing investment & retooling required by OEMs, lower unit costs & faster to market than fuel cells



Project with Scania to commence 2H 2021

4Q20 Results

Financial Highlights – 4Q20



\$83.9 million



13%
vs. 4Q19

FY2020 \$252.5 million



\$8.1 million



125%
vs. 4Q19

FY2020 \$14.7 million



\$4.1 million



+\$3.4 million
vs. 4Q19

FY2020 (\$7.4) million



\$64.3 million



+\$18 million
vs. 4Q19

**\$14.4m raised from
ATM in 4Q20**

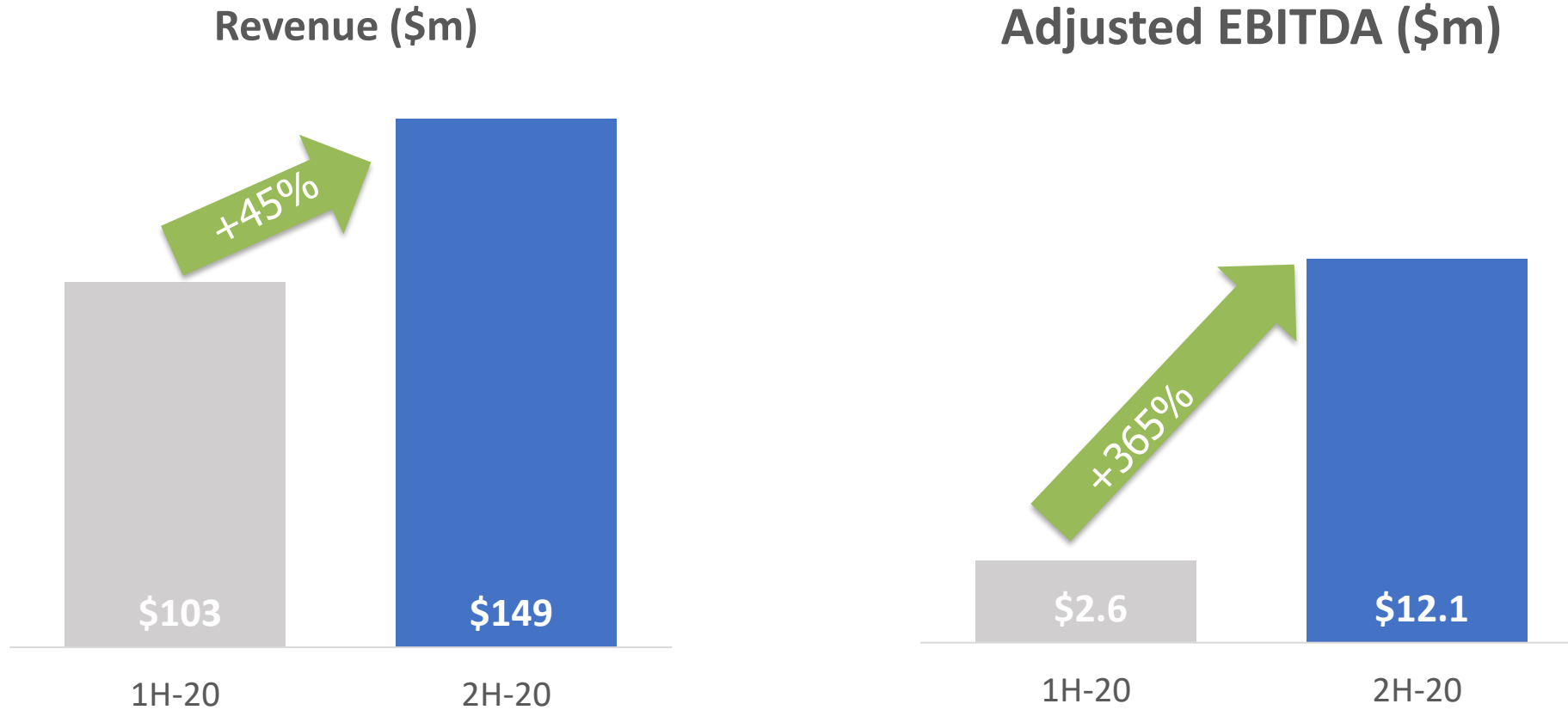
Revenue

Adjusted EBITDA

Net Income (Loss)

Cash + Liquidity

Recovery from COVID



Strong recovery in the second half in top and bottom lines

Financial Results – Fourth Quarter 2020

Consolidated Financial Data

GAAP (\$ millions, except per share)	4Q20A	4Q19A	O/(U)
Revenues	\$ 83.9	\$ 74.3	\$ 9.6
Gross Margin	13.0	13.8	(0.7)
Loss from Continuing Operations	(0.7)	(5.5)	4.8
Equity Income - CWI and Other	9.9	6.8	3.1
Net Income	4.1	0.7	3.5
Net Income per Share	0.03	0.00	0.03
Operating Cash Flow	(12.0)	0.3	(12.3)
Cash and Cash Equivalents	64.3	46.0	18.3

Non-GAAP (\$ millions)	4Q20A	4Q19A	O/(U)
EBITDA	\$ 13.1	\$ 5.0	\$ 8.1
Adjusted EBITDA	8.1	3.6	4.5
Adjusted Operating Cash Flow	(5.0)	7.6	(12.6)

Commentary

- Revenues higher YoY due to strong HPDI sales volumes to initial launch partner. IAM and LD OEM continue to recover from impact on sales volumes from COVID-19, with strong Q-o-Q performance from OEM LD.
- Better sales performance not reflected strongly in gross margin mainly due to lower Y-o-Y margins realized on HPDI product sales (large one-time contractual price reduction in 4Q19), and lower high margin HPDI engineering services and IAM sales.
- Generated higher Y-o-Y adjusted EBITDA of \$8.1m bolstered by strong quarterly performance from CWI joint venture.
- Adjusted operating cash flow decreased YoY due to increase in working capital resulting from increase in receivables from higher sales volumes in HPDI and inventory in anticipation of higher HPDI sales volume in 1Q21.

Financial Results – FY 2020

Consolidated Financial Data

GAAP (\$ millions, except per share)	2020A	2019A	O/(U)
Revenues	\$ 252.5	\$ 305.3	\$ (52.8)
Gross Margin	39.5	68.2	(28.6)
Loss from Continuing Operations	(23.0)	(21.4)	(1.6)
Equity Income - CWI and Other	24.0	26.7	(2.7)
Net Income (Loss)	(7.4)	0.2	(7.6)
Net Income (Loss) per Share	(0.05)	0.00	(0.05)
Operating Cash Flow	(35.1)	(15.7)	(19.5)
Cash and Cash Equivalents	64.3	46.0	18.3

Non-GAAP (\$ millions)	2020A	2019A	O/(U)
EBITDA	\$ 16.1	\$ 24.9	\$ (8.8)
Adjusted EBITDA	14.7	28.4	(13.7)
Adjusted Operating Cash Flow	(14.4)	9.4	(23.8)

Commentary

- Revenues lower YoY due pandemic's impact on IAM, OEM LD and DOEM, partially offset by strong sales growth in HD OEM, net of contractual price reductions and lower engineering services work.
- YoY gross margin declined mainly due to lower IAM, OEM LD and DOEM revenues, and the price reductions and lower engineering services work in HD OEM. Further impact of a \$3.2m charge taken on two PRD field service actions.
- Equity income from CWI decreased in 2020 mainly due to the impact of COVID-19 and the related OEM shutdowns in 1H20.
- Despite challenging year, generated positive adjusted EBITDA of \$14.7m supported by government wage subsidies of \$6.1m, and cost reductions from austerity measures.
- OCF and Adjusted OCF were significantly impact by COVID-19. Multiple financing efforts, government support and austerity measures mitigated this impact to secure the liquidity of WFS.

Delivering Clean Transportation Solutions



Cost Competitive and Commercially Available

Developed, validated, in production, for sale and in use around the world

Low incremental costs to access cleaner, more affordable fuels



Financial Discipline and Performance

Strong record of improvement

Sustainable profitability driven by growth, aligning costs with revenues, and fiscal discipline in investment decisions



Gaseous Fuels Industry Leader

Sales in 70 countries
CNG, LNG, RNG, LPG, H₂

All transportation applications

Leading market shares



Environmental Solutions for Climate and Air Quality

Reduced CO₂ emissions

Reduced criteria emissions

Net zero carbon NOW



100% Renewable

Growing RNG availability means net zero carbon transportation is possible NOW with gaseous fuels



Alternative Fuels at Scale

No performance compromise

Lower total cost of ownership

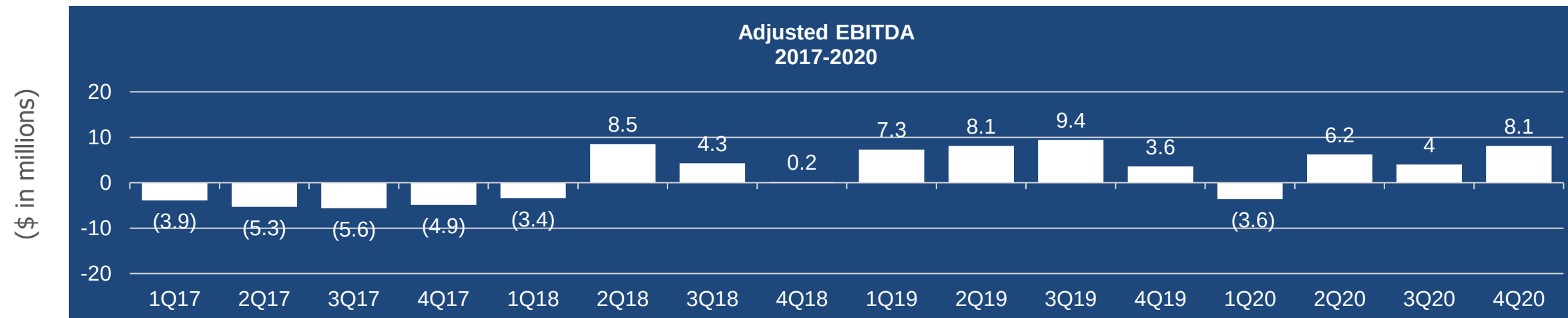
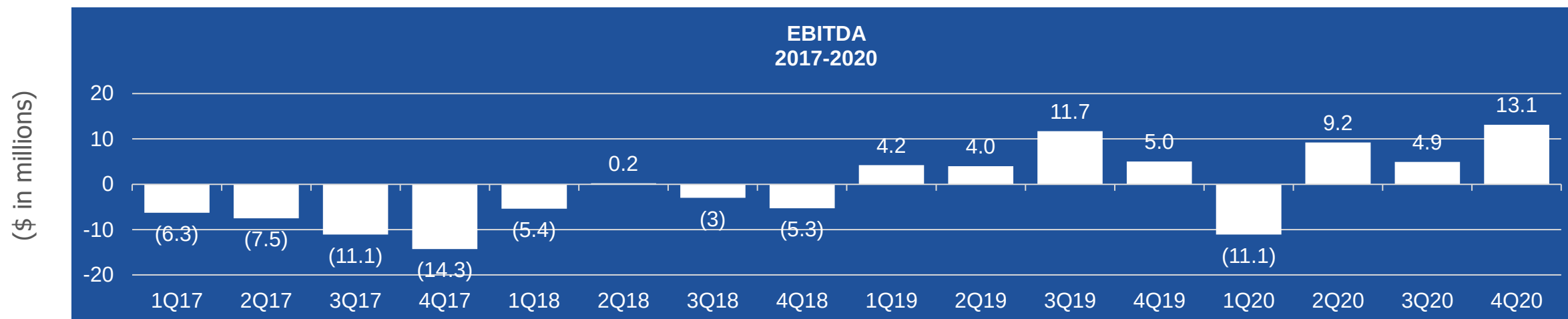
Enables OEMs to meet regulations at the lowest cost



Appendix



Improving EBITDA and Adjusted EBITDA



Balance Sheet & Liquidity

Key Metrics

Cash & Liquidity	4Q20	3Q20	4Q19
Cash Balance	\$64	\$46	\$46
Line of Credit + Bridge Loan	\$6	\$8	\$1
Total Liquidity	\$70	\$54	\$47
Liabilities	4Q20	3Q20	4Q19
Convertible Debt	\$4	\$10	\$17
EDC Term Loan + Bridge Loan	\$20	\$18	\$13
HSBC AR Facility	\$18	\$8	\$4
UniCredit Loans	\$31	\$31	\$11
Deutsche Bank	\$8	\$8	-
Other Banks	\$4	\$1	\$4
Total Debt	\$85	\$76	\$49
Cartesian Royalty	\$16	\$14	\$18
Total Liabilities	\$101	\$90	\$67

Working Capital	4Q20	3Q20	4Q19
Change in working capital	\$(8.5)	\$(4.6)	\$4.8

Commentary

- Improved and enhanced liquidity in 2020
 - Secured government-backed loans in Italy
 - Deferred principal payments on term loan with EDC and entered a new bridge term loan to weather COVID-19 economic impact
 - Restructured Cartesian convertible debt; \$7.5m of \$10m debt converted to equity as of 1Q21
 - Increased limit on HSBC AR facility to fund working capital for HPDI
 - At-The-Market (ATM) program raised \$27m as of 1Q21
- Change in non-cash working capital increased in 2020 due to build up of accounts receivable and inventory build-up on higher sales volume of HPDI
- Key financing priorities in 2021:
 - Fund capital program to expand HPDI production capacity, technology development and expand industry applications
 - Restructure existing debt to provide additional financial flexibilities to support growth
 - Improve working capital through partnership with suppliers

Business Segment – OEM

Selected Statements of Operations Data

(in \$ millions except Gross Margin %)

	4Q20A	4Q19A	O/U
Revenue	\$ 58.8	\$ 44.7	\$ 14.1
Gross Margin	6.6	5.3	1.3
Gross Margin (%)	11%	12%	
Operating Loss	(3.0)	(6.1)	3.1
Depreciation	2.1	1.9	0.2

	FY 2020	FY 2019	O/U
Revenue	\$ 149.6	\$ 164.7	\$ (15.1)
Gross Margin	12.3	29.7	(17.4)
Gross Margin (%)	8%	18%	
Operating Loss	(21.2)	(12.7)	(8.5)
Depreciation	8.2	9.5	(1.3)

Commentary

Fourth Quarter 2020

- Revenue higher due to strong sales volume of HPDI systems to initial launch partner, net of contractual price reductions, and stronger EURO
- Gross Margin increase due to increase in HPDI sale volume, net of price reduction
- Operating Loss narrows due to increased revenue partially offset by lower HPDI service revenue

Full Year 2020

- Revenue decreased primarily due to the impact of plant shutdowns in response to COVID-19 in the first half of the year, combined with lower light-duty OEM sales
- Gross Margin decline due to lower sales, net warranty charge of \$3.2 million related to two field service actions and higher percentage of lower margin HPDI products sold

Business Segment – Independent After Market

Selected Statements of Operations Data

(in \$ millions except Gross Margin %)

	4Q20A	4Q19A	O/U
Revenue	\$ 25.1	\$ 29.6	\$ (4.5)
Gross Margin	6.4	8.5	(2.1)
Gross Margin (%)	25%	29%	
Operating Income	1.3	2.2	(0.9)
Depreciation	1.6	1.9	(0.3)

	FY 2020	FY 2019	O/U
Revenue	\$ 102.9	\$ 140.6	\$ (37.7)
Gross Margin	27.2	38.5	(11.3)
Gross Margin (%)	26%	27%	
Operating Income	6.6	11.9	(5.3)
Depreciation	5.6	6.6	(1.0)

Commentary

Fourth Quarter 2020

- Revenue decreased due to the continuing impact of COVID-19 on customer demand in Western Europe
- Gross Margin decreased due to lower sales from higher-margin markets in Western Europe

Full Year 2020

- Revenue decreased due to the plant shutdowns in response to COVID-19 in the second quarter of 2020 partially offset by the stronger EURO during 2020
- Gross margin reduced slightly as lower revenue offset by government subsidies and austerity measures

Business Segment – Cummins Westport Joint Venture

Selected Statements of Operations Data – 100%

(in \$ millions except Unit Sales & Gross Margin %)

	4Q20A	4Q19A	O/U
Unit Sales	2,288	2,407	(119)
Total Revenue	\$ 96.0	\$ 102.5	\$ (6.5)
Gross Margin	28.5	28.3	0.2
Gross Margin (%)	30%	28%	
Net Income	18.8	13.4	5.4
Equity Income - 50%	9.4	6.7	2.7

	FY 2020	FY 2019	O/U
Unit Sales	7,065	7,883	(818)
Total Revenue	\$ 323.5	\$ 361.8	\$ (38.3)
Gross Margin	87.3	104.1	(16.8)
Gross Margin (%)	27%	29%	
Net Income	47.6	53.2	(5.6)
Equity Income - 50%	23.8	26.6	(2.8)

Commentary

Fourth Quarter 2020

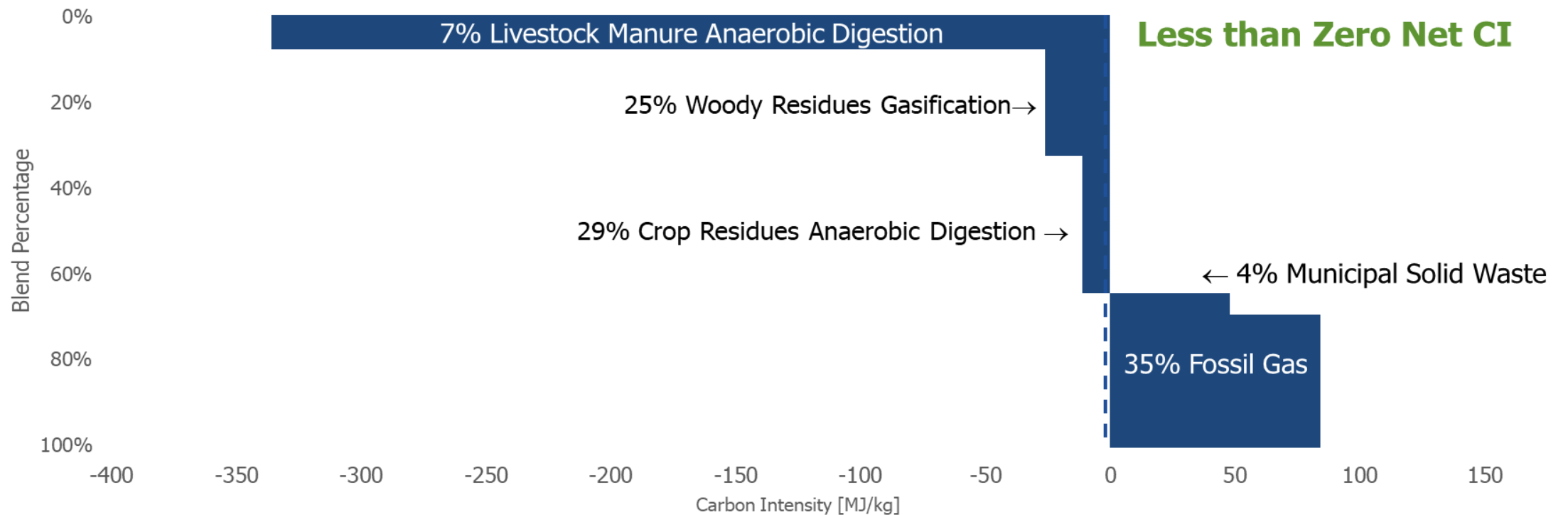
- Revenue decreased due to decline in parts revenue
- Gross Margin increased driven largely by product mix which more than offset lower revenue in the quarter

Full Year 2020

- Unit sales lower for the year due to the impact of OEM factory shutdowns in 2Q20 in response to the COVID-19 pandemic
- Gross margin decreased primarily related to lower revenue and a lower proportion of high-margin part sales

Can We Make Road Transport Carbon Neutral?

With zero net-carbon biomethane and a fossil gas BLEND, there is enough renewable gas feedstock to power 100% of the EU 28 truck energy demand in 2030



Source: WFS Analysis (2019) presented to SAE International with estimates based on CARB [LCFS](#) averages and [GTI](#) data sources

Alternative Fuel Capabilities

Broad Range of Products that Deliver Emission Reductions

LPG

Liquefied Petroleum Gas / Propane / Autogas



- Components and complete systems
- Light-duty applications – vapor and liquid LPG
- Monofuel, bi-fuel, dual fuel solutions
- The most commonly used alternative fuel in the world

CNG

Compressed Natural Gas



- Components and complete systems
- Light- and medium-duty applications
- Monofuel, bi-fuel, dual fuel solutions

LNG

Liquefied Natural Gas



- Complete systems
- Heavy-duty and high horsepower applications
- Monofuel and dual fuel solutions

H₂

Hydrogen



- High and low pressure components
- Light- to heavy-duty and industrial applications
- Hydrogen/CNG blends or pure hydrogen

All Available as Renewable Fuels
Substitute for fossil-based fuels

CNG AND LNG STATIONS IN EUROPE

STATIONS OVERVIEW

CNG Stations in Europe

Change view: **CNG** LNG



Change view: **CNG** LNG



CNG stations today = 3,982
LNG stations today = 395