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2026 Integrated Energy Policy Report
Draft Transportation Energy Demand Forecast

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Abbreviations

AATE – Additional Achievable Transportation Electrification

BEV – Battery-Electric Vehicle

FCEV – Fuel Cell Electric Vehicle

LD – Light-Duty

MDHD – Medium- and Heavy-Duty

PHEV – Plug-In Hybrid Electric Vehicle

YTD – Year-to-Date

ZEV – Zero-Emission Vehicle

Transportation Electrification Forecast

Baseline Forecast

- Vehicle and energy demand based on continuing economic and market trends, as well as existing policies

Additional Achievable Transportation Electrification (AATE) Scenarios

- Baseline forecast augmented to integrate policies or market transformation that existing demand-side models cannot typically model
- Post-process new sales proportions or population proportions by vehicle fuel type

AATE Scenario Descriptions

AATE 2
Accounts for uncertainty in policy/regulatory areas that may lead to increased but moderate growth

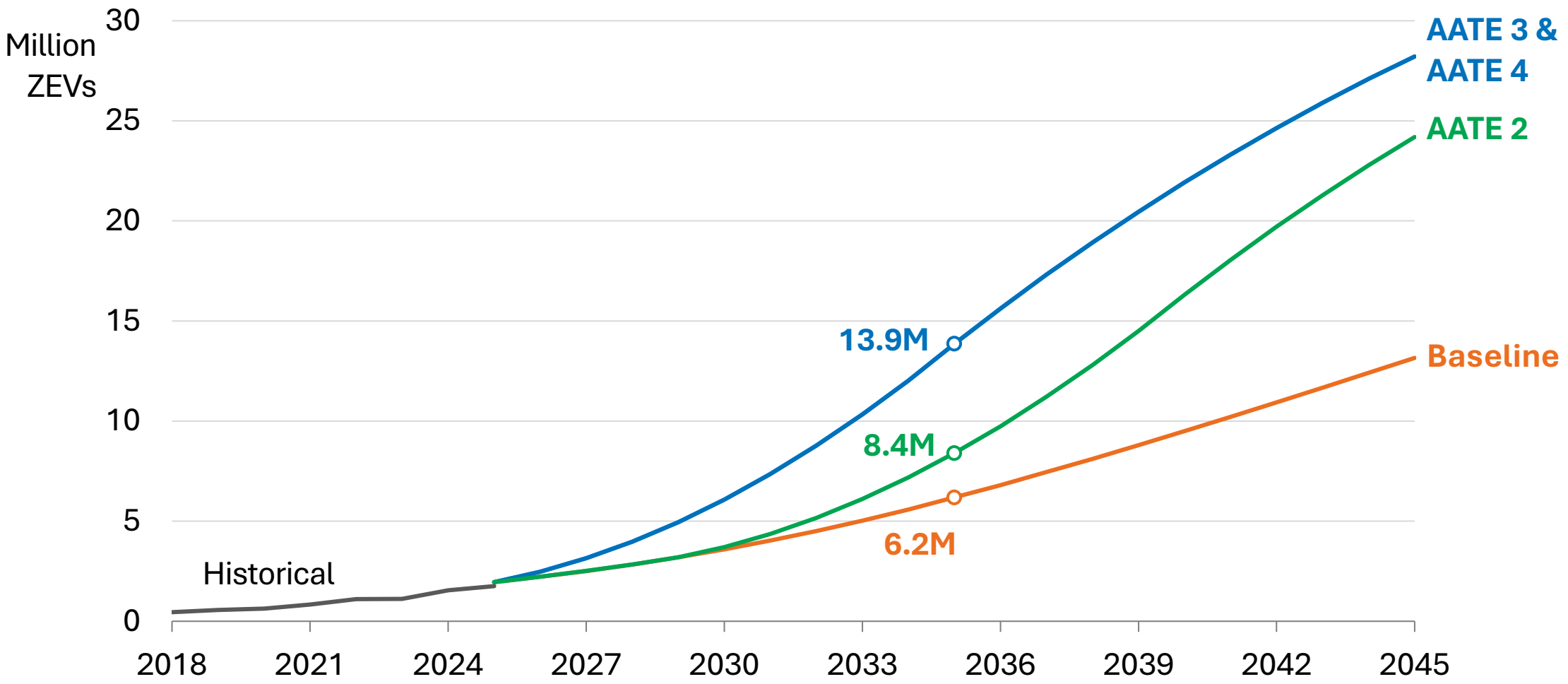
AATE 3
Based on recent policies and can be used to guide utility infrastructure investments and resource planning

AATE 4
Incorporates a high-end projection of the number of vehicles that would support California's ZEV policy goals

2025 IEPR Forecast Scenarios - Vehicle Growth Rates

Scenario	LD Vehicles	MDHD Vehicles
Baseline	Baseline	Baseline
AATE 2	Moderate Growth	Baseline
AATE 3	High Growth	Baseline
AATE 4	High Growth	High Growth

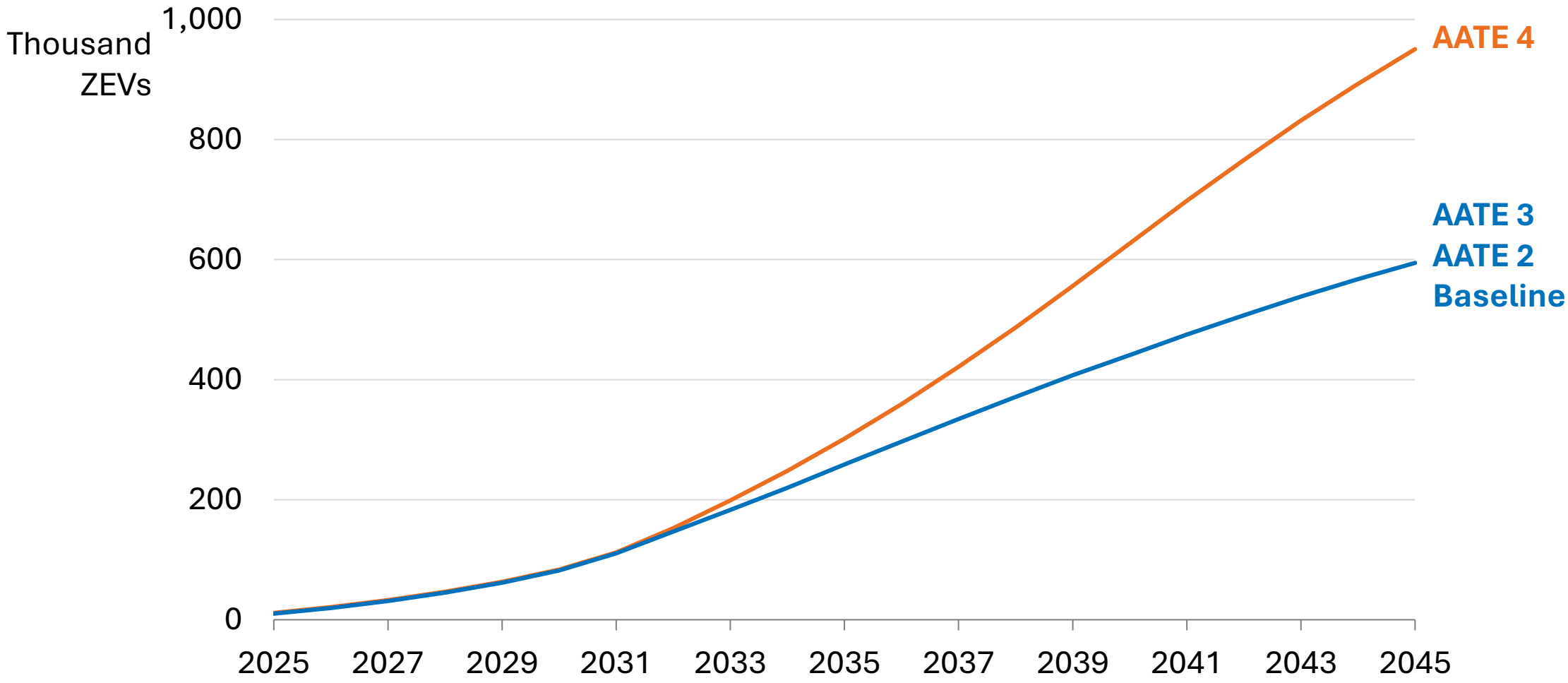
2025 IEPR Light-Duty BEV Population Forecast



Source: CEC Staff

Note: AATE 3 and AATE 4 for LD ZEVs are identical, so only one line is shown

2025 IEPR MDHD On-Road Freight BEV Stock Forecast



Source: CEC Staff

Note: Baseline, AATE 2, and AATE 3 for MDHD EVs are identical, so only one line is shown

Light-Duty ZEV Sales Trends in California

LIGHT-DUTY ZEV						TOTAL LIGHT-DUTY
CUMULATIVE SALES			ANNUAL SALES			ANNUAL SALES
Sales through 2025			Sales in 2025			Sales in 2025
2,551,121			408,731			1,782,666
BEV	PHEV	FCEV	BEV	PHEV	FCEV	ZEV Sales Share
1,968,736	563,941	18,444	351,043	57,325	363	22.9%

LIGHT-DUTY ZEV						TOTAL LIGHT-DUTY	
CUMULATIVE SALES			ANNUAL SALES			ANNUAL SALES	
Sales through 2026			YTD Sales in 2026			Sales in 2026	
2,784,253			233,132			Q3 Sales	YTD Sales
BEV	PHEV	FCEV	BEV	PHEV	FCEV	420,622	1,292,266
2,171,098	594,452	18,703	202,362	30,511	259	Q3 ZEV Share	YTD ZEV Share
						19.1%	18.0%

Source: New ZEV Sales in California

Transportation Market Update - Uncertainty

Key Factors Supporting Electric Vehicle Growth

- Continued High Gasoline and Diesel Prices
- MyFirstEV Vehicle Purchase Incentive Program
- Growing Number of EV Makes and Models
- Growing Number of Charging Options

Key Factors Hindering Electric Vehicle Growth

- Lack of Federal Support
- Regulatory Uncertainty
- Challenging Vehicle Purchase Economics (all vehicles regardless of fuel type)
    - Inflation
    - High Upfront Vehicle Costs
    - High Interest Rates
    - Lower Consumer Confidence

Draft 2026 IEPR Forecast - Transportation Electrification Recommendation

Potential Forecast Case	Scenario	LD Vehicles	MDHD Vehicles
Baseline	Baseline	Baseline	Baseline
TBD	AATE 2	Moderate Growth	Baseline
TBD	AATE 3	High Growth	Baseline
TBD	AATE 4	High Growth	High Growth

Recommendation:

Utilize 2025 Transportation Energy Demand Forecast with minor updates to reflect updated EV charging load shapes

Thank You!

Questions? Comments?

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