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<th>20-IEPR-02</th>
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<td><strong>Project Title:</strong></td>
<td>Transportation</td>
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<tr>
<td><strong>Document Title:</strong></td>
<td>Presentation - IEPR Workshop Transportation Trends and ZEV Market Update</td>
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<tr>
<td><strong>Description:</strong></td>
<td>Ajay Chawan, Guidehouse</td>
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<td><strong>Filer:</strong></td>
<td>Raquel Kravitz</td>
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<td><strong>Organization:</strong></td>
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IEPR Workshop: Transportation Trends and ZEV Market Update

June 2020
North American PEV Registration Forecast
Pre- and Post-COVID-19 Forecast Comparison

- COVID-19 is projected to have a <2% impact on EV population by 2030
- Short-term annual sales are projected to be impacted more significantly

This forecast does not account for vehicle retirement due to the limited PEV retirement data.
Project Summaries: How to Promote ZEV Sales

Findings from numerous projects have identified key pillars for supporting ZEV adoption

- Support development of EV models that consumers and businesses desire to acquire
- Awareness Generation: Promote consumer interaction with ZEVs
- Maintain a transparent, reliable incentive structure
- Promote the early retirement of ICE vehicles via a “Cash for ICE” program
China: The Driver for EV Product Development

The magnitude of the Chinese market makes it a driving force in the EV movement

Beijing: Impact of Emission Controls

WITH

• High level of emissions from factories and vehicles contribute to air quality in Beijing and other major cities to be “unhealthy”

WITHOUT

New Energy Vehicle Mandate

• Modeled after California ZEV Mandate
• Elements include:
  – 12% ZEV sales in 2020
  – Future ban on ICE vehicles

Sources: CNN, ICCT, Navigant Research

Global Light-Duty Vehicle Sales

• China represents ~30% of global LD vehicle sales
  – U.S.: ~19%
  – Western Europe: ~17%
• Market power drives product development decisions at OEMs

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Case Study: Fleet Electrification

Under today’s conditions, it can be cost effective to electrify 50% of a fleet of LD, MD, and HD vehicles.
Contact

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