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IEPR Workshop: Transportation Trends and ZEV Market Update

June 2020

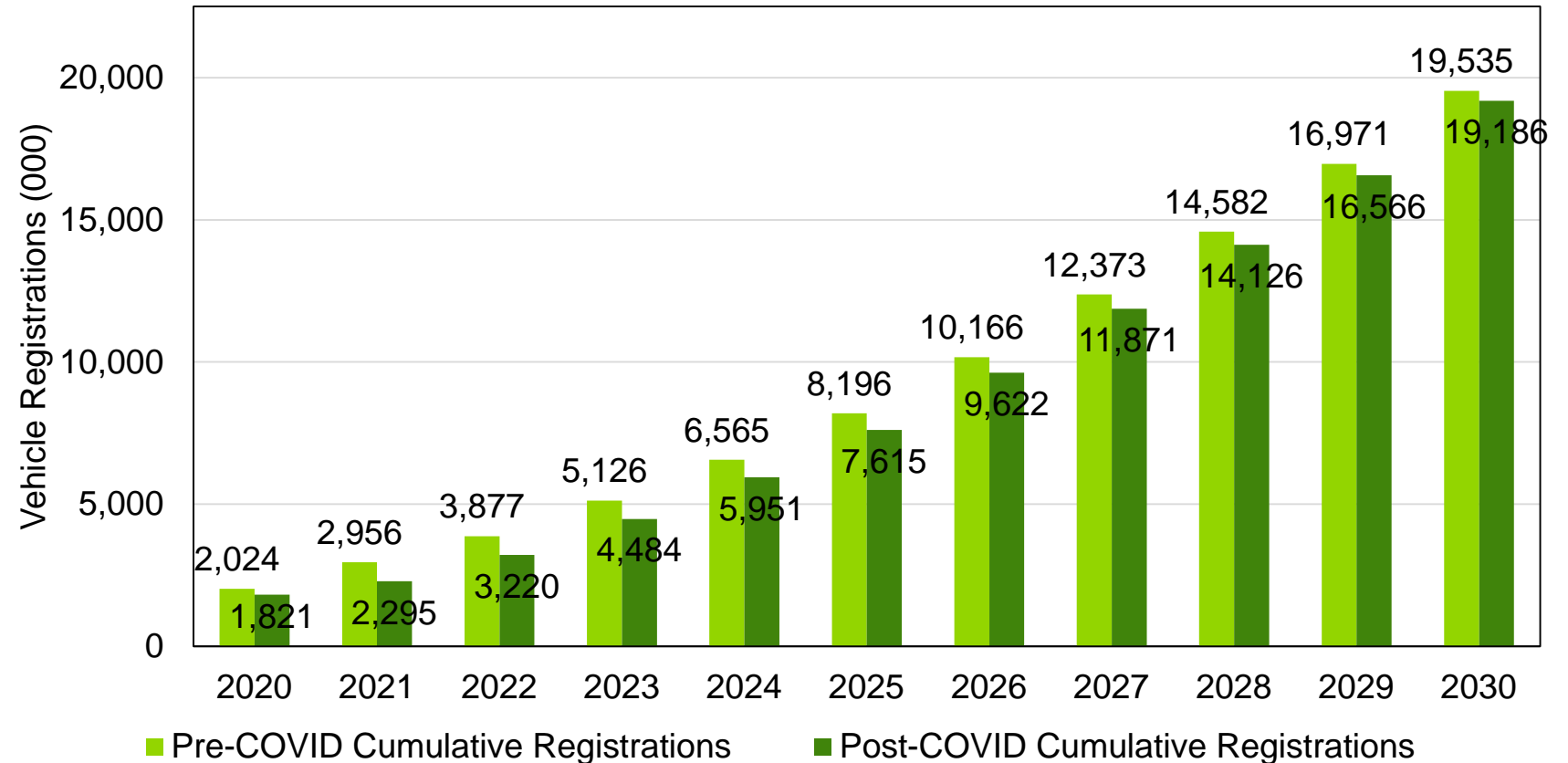


North American PEV Registration Forecast

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

PEV Registration Forecast: 2020-2030



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

Maintain a transparent, reliable incentive structure

Awareness Generation:
Promote consumer interaction with ZEVs

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



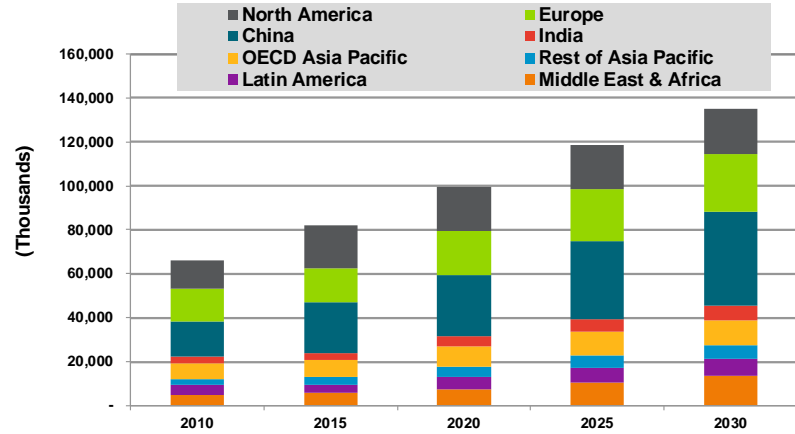
- High level of emissions from factories and vehicles contribute to air quality in Beijing and other major cities to be “unhealthy”

New Energy Vehicle Mandate



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

Global Light-Duty Vehicle Sales

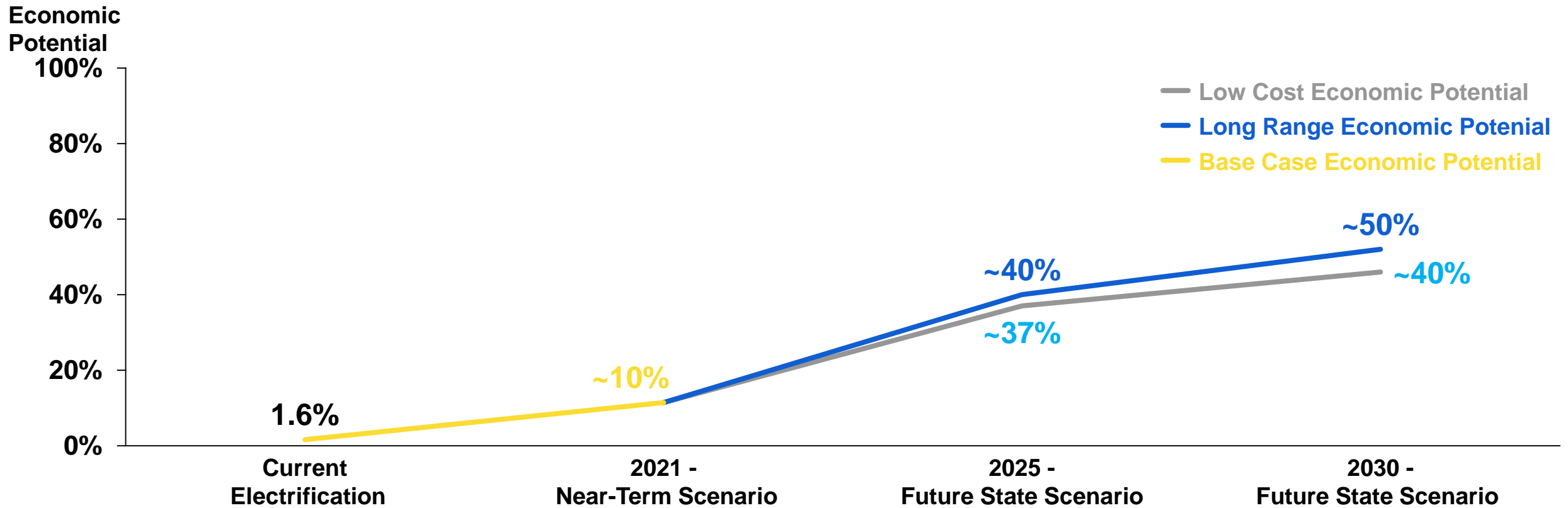


- China represents ~30% of global LD vehicle sales
 - U.S.: ~19%
 - Western Europe: ~17%
- Market power drives product development decisions at OEMs

Sources: [CNN](#), [ICCT](#), [Navigant Research](#)

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



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