

DOCKETED	
Docket Number:	26-IEPR-03
Project Title:	Electricity and Gas Demand Forecast
TN #:	272223
Document Title:	Presentation - 2026 Integrated Energy Policy ReportTransportation Forecast Inputs and Assumptions
Description:	4. Andre Freeman, CEC
Filer:	Raquel Kravitz
Organization:	California Energy Commission
Submitter Role:	Commission Staff
Submission Date:	8/28/2026 7:56:58 AM
Docketed Date:	8/28/2026



2026 Integrated Energy Policy Report Transportation Forecast Inputs and Assumptions

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August 31, 2026



Abbreviations

AATE – Additional Achievable Transportation Electrification

AMI – Advanced Metering Infrastructure

DMV – Department of Motor Vehicles

EV – Electric Vehicle

EIA – U.S. Energy Information Administration

IEPR – Integrated Energy Policy Report

LD – Light-Duty

MDHD – Medium- and Heavy-Duty

NEV – Neighborhood Electric Vehicle

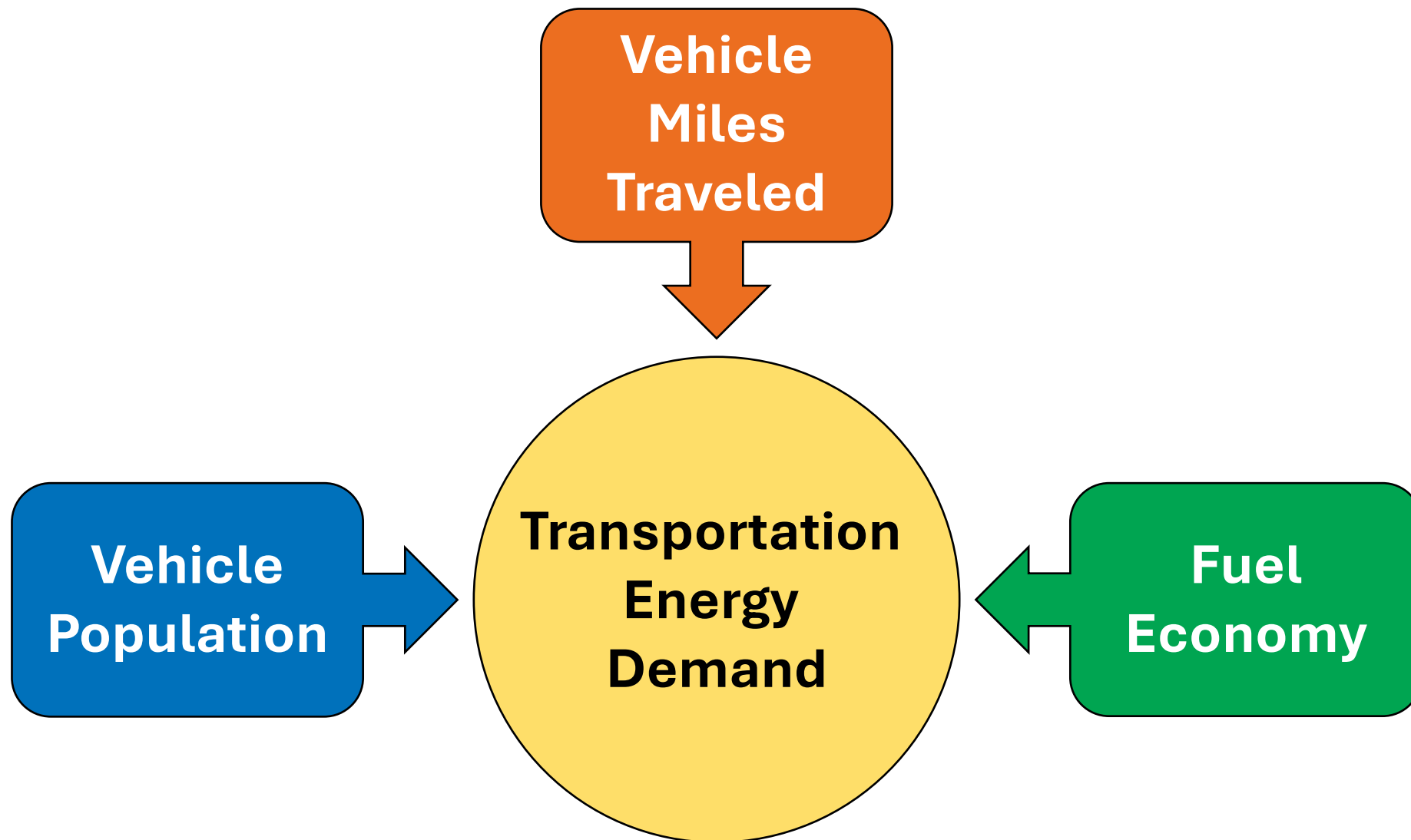
NTD – National Transit Database

TE – Transportation Electrification

ZEV – Zero-Emission Vehicle



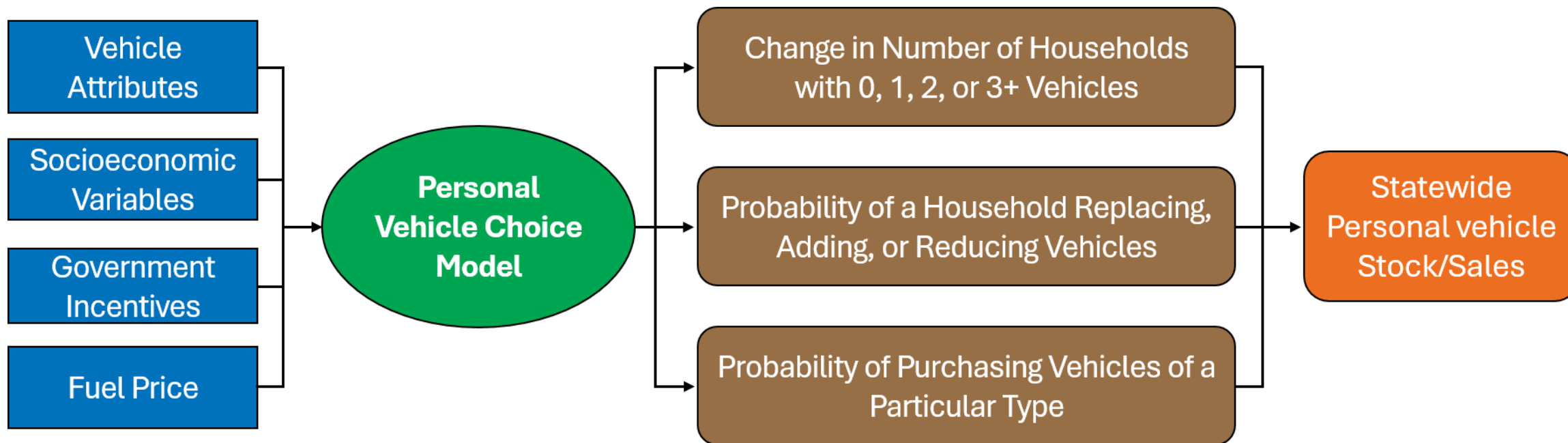
Transportation Energy Demand





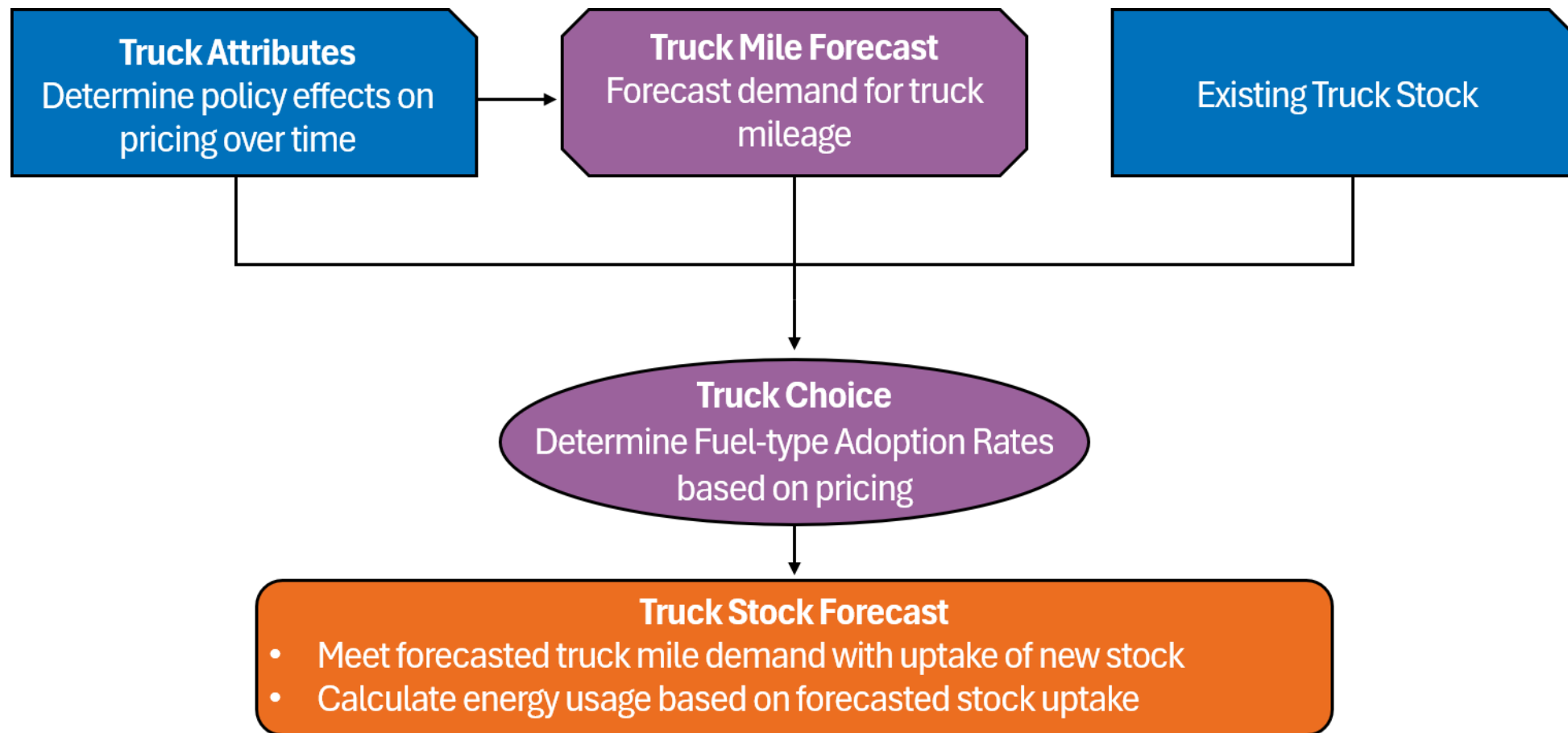


LD Vehicle Choice Modeling and Resulting Vehicle Stock





On-Road Freight Truck Stock Forecast





Transportation Electrification Scenarios

Baseline Forecast

- Represents a projection of the vehicle market based on continuing trends and existing policies.

Additional Achievable Transportation Electrification (AATE) Scenarios

- Above the baseline are used for integration of policies that existing demand-side models cannot readily account for.
- Managed forecasts that post-process some vehicle fuel types to align with sales proportions or population proportions stipulated by ZEV regulations and policies



Additional Achievable Transportation Electrification Scenarios

Scenario	Characterization
AATE 2	Accounts for uncertainty in policy/regulatory areas that may lead to increased but moderate growth of ZEV population
AATE 3	Scenario 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 result from recent aspirational policies and goals



Draft 2026 IEPR Forecast Transportation Electrification Scenarios

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

Key Updates

- Vehicle Stock and Specific Attributes
- Economic and Demographic Inputs
- EV Charging Load Shapes
- 2024/2025 California Vehicle Survey
- New California ZEV Purchase Incentive



Considerations for 2027 and Beyond

- Uncertainty Regarding Federal Government Policies
- Continued AMI analysis
- New State and Local Government ZEV Regulations/Policies
- Updated Vehicle Attributes
- Petroleum Fuel Price Forecast Updates
- Autonomous EV Travel Projections
- Improved Forecast Zone Energy Assignments

Thank You!

Questions? Comments?



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