

## ZEV Market Report



**OCTOBER 2016**

Automakers are investing billions of dollars to create a market for zero emission vehicles. Automakers are currently selling the following types of ZEVs:

- battery electric vehicles (BEV)
- plug-in hybrid electric vehicles (PHEV)
- fuel cell electric vehicles (FCEV)



### NATIONAL SALES OVERVIEW



**0.8%**

Market share of new ZEV sales nationwide

January – October 2016



**0.7%**

Market share of new ZEV sales in 9 ZEV States

January – October 2016



**3.6%**

Market share of new ZEV sales in California

January – October 2016



**51%**

Percent of national ZEV sales that occurred in California

January – October 2016







### NEW VEHICLE SALES MARKET SHARE

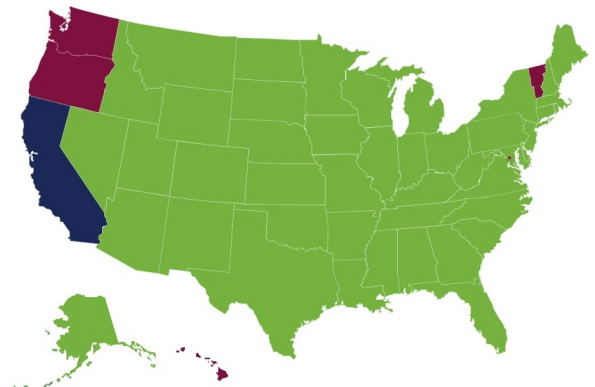
#### January - October 2016

Several factors affect ZEV sales in different states: investment in infrastructure and consumer incentives; consumer awareness; consumer preference; and climate and geography. **California and nine other states require that 15% of new vehicle sales be ZEVs by 2025.**

#### ZEV MARKET SHARE

-  **Less than 1%**
-  **1% - 1.9%**
-  **2% - 2.9%**
-  **3% - 3.9%**

#### New Vehicle Sales



Source: IHS Automotive Vehicle Registration



## ZEV STATE PROGRESS TOWARD 2025













### 2011 – October 2016

By 2025, the ZEV sales mandate cumulatively requires auto manufacturers to sell approximately **four million ZEVs** in ten states, regardless of market conditions, infrastructure availability, and/or consumer preferences. The table below tracks these states' progress toward meeting these challenging 2025 targets.

State	ZEVs sold since 2011 (cumulatively)	ZEV target by 2025 (cumulatively)	Progress made toward target
California	242,245	1,500,000	<div style="width: 16%;"><div style="width: 16%;"></div></div>
Connecticut	4,863	154,000	<div style="width: 3%;"><div style="width: 3%;"></div></div>
Maine	1,161	65,000	<div style="width: 2%;"><div style="width: 2%;"></div></div>
Maryland	7,876	289,000	<div style="width: 3%;"><div style="width: 3%;"></div></div>
Massachusetts	8,502	302,000	<div style="width: 3%;"><div style="width: 3%;"></div></div>
New Jersey	10,918	635,000	<div style="width: 2%;"><div style="width: 2%;"></div></div>
New York	19,754	843,000	<div style="width: 2%;"><div style="width: 2%;"></div></div>
Oregon	10,838	133,000	<div style="width: 8%;"><div style="width: 8%;"></div></div>
Rhode Island	837	43,000	<div style="width: 2%;"><div style="width: 2%;"></div></div>
Vermont	1,559	35,000	<div style="width: 4%;"><div style="width: 4%;"></div></div>

## U.S. NEW VEHICLE SALES TRENDS

### January - October 2016 vs. January - October 2015

	All Vehicles		ZEV Total		BEV		PHEV	
	2016 Volume	% Change	2016 Volume	% Change	2016 Volume	% Change	2016 Volume	% Change
U.S.	14,072,576	-2% 	118,549	36% 	61,358	13% 	56,375	70% 
California	1,681,154	-1% 	60,389	31% 	33,149	18% 	26,427	47% 
9 ZEV States	2,361,688	-1% 	16,972	75% 	6,847	33% 	10,124	122% 

\*Sales volume percentage change from January – October 2015

Source: IHS Automotive Vehicle Registration



## ABOUT GLOBAL AUTOMAKERS

The Association of Global Automakers represents international motor vehicle manufacturers, original equipment suppliers, and other automotive-related trade associations. We work with industry leaders, legislators, and regulators to create the kind of public policy that improves vehicle safety, encourages technological innovation, and protects our planet. Our goal is to foster a competitive environment in which more vehicles are designed and built to enhance Americans' quality of life.

Learn more about  
the ZEV mandate at  
[DrivingZEV.com](http://DrivingZEV.com)



A Project By **GlobalAutomakers** 

