

# *Minnesota: Electric Vehicle Briefing*

*February 18, 2021*



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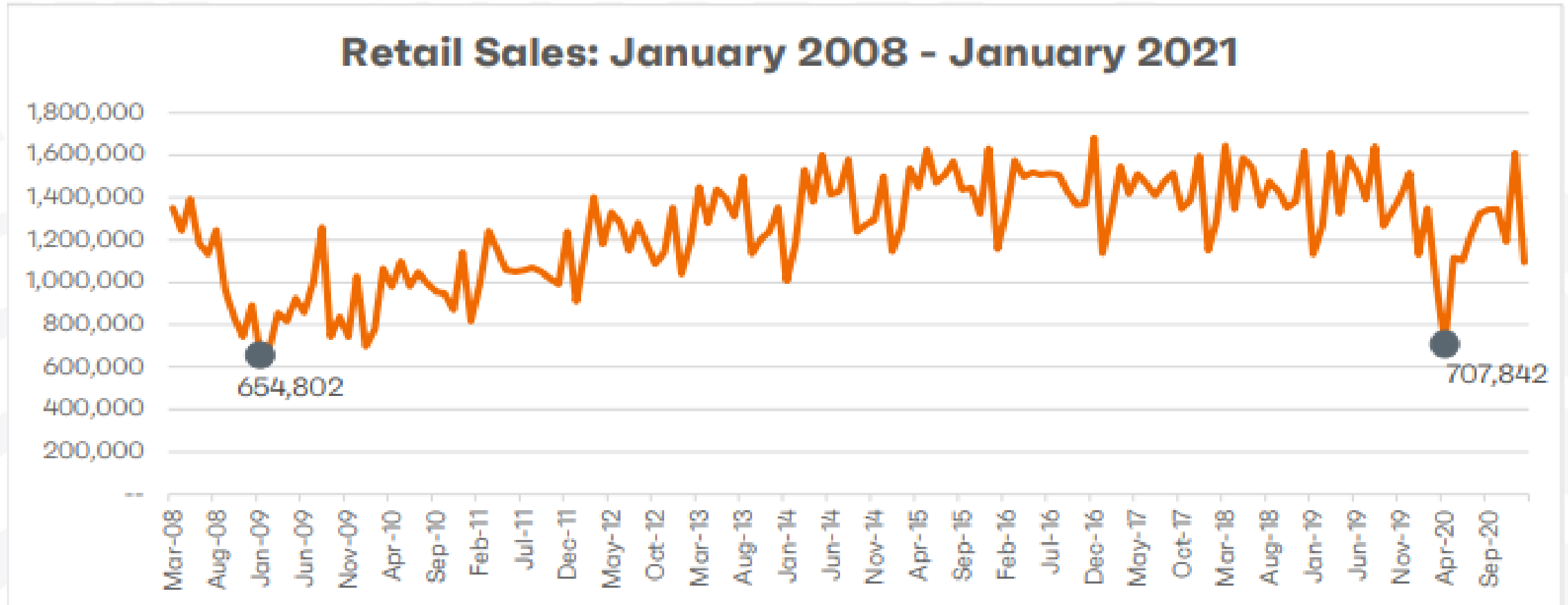
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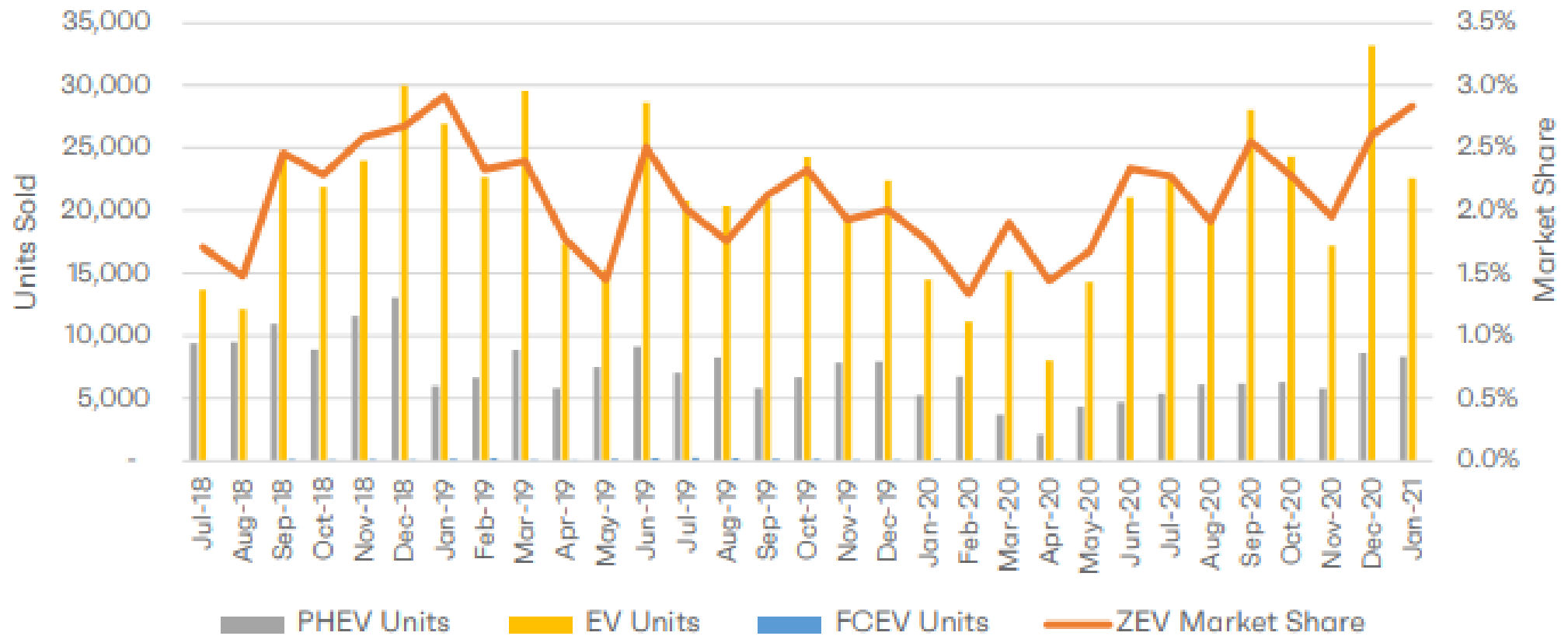
# Reading the Meter – Vehicle Sales Trends

# Reading the Meter – All Vehicle Sales

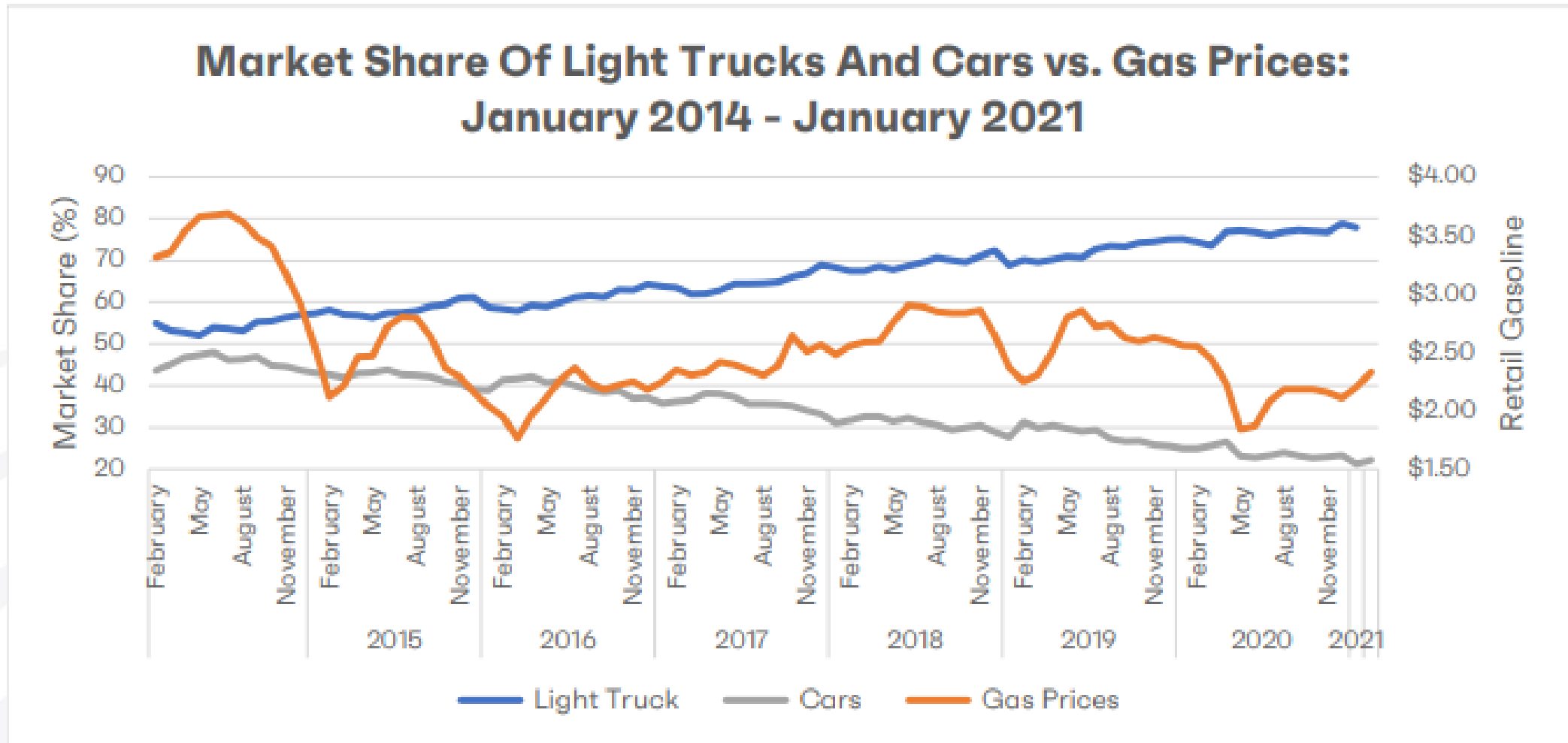


# Reading the Meter – ZEV Sales

• **ZEV Sales And Percentage Of All Volume:  
July 2018 - January 2021**



# What's Driving the Market?



# All In: Industry Commitment to ZEVs

# The Industry is “All In” on ZEVs

## Powertrain Options

16  
BEV

25  
PHEV

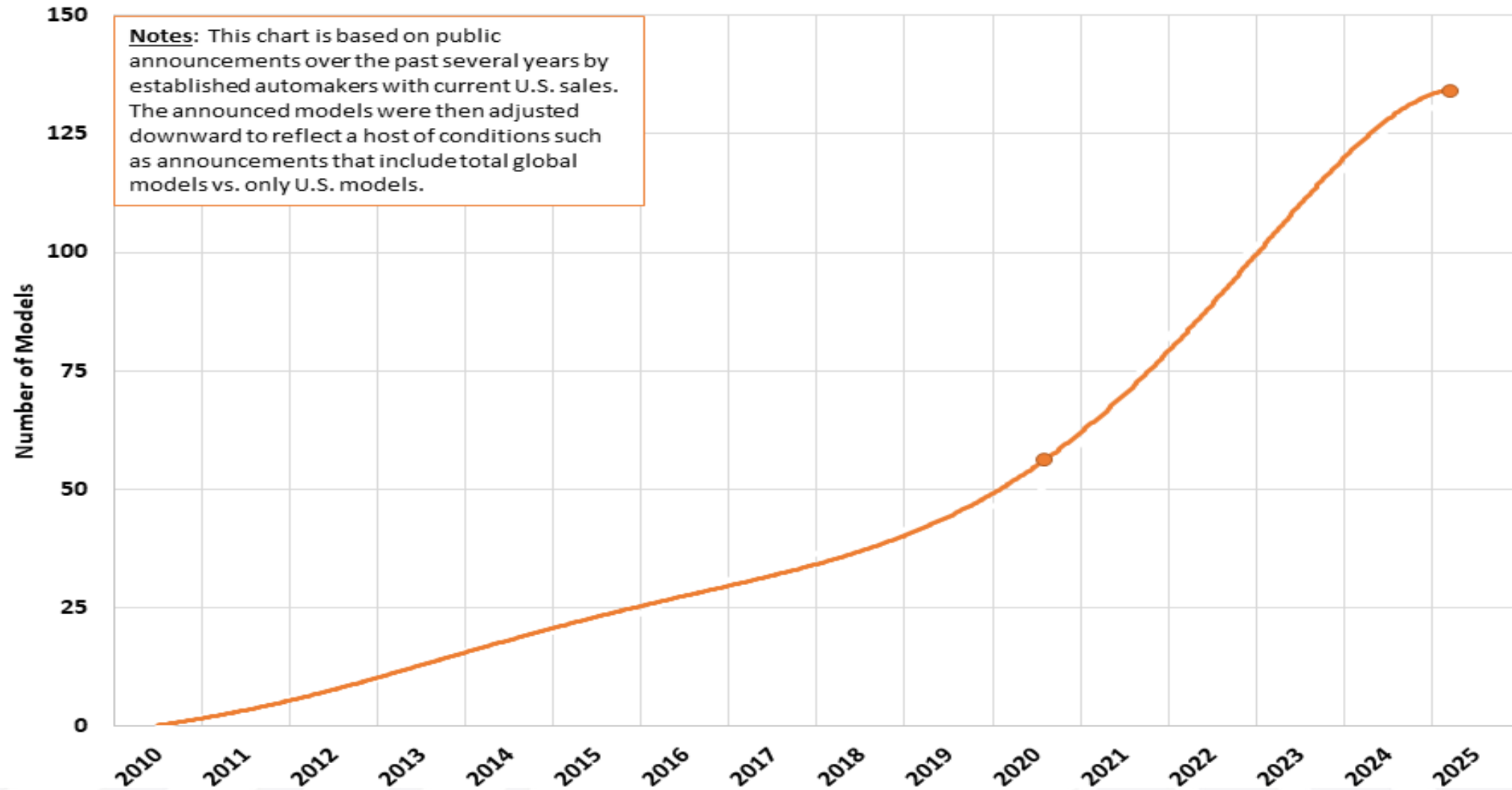
3  
Fuel Cell

- More than 40 models of plug-in hybrid (PHEV), fully electric (BEV), and fuel cell electric vehicles (FCEV) are available now to consumers — and more are on the way.
- Our industry’s investments in vehicle electrification are not slowing; investments are expected to reach over \$250 billion globally by 2023.
- With availability of models increasing rapidly, there will be more options to meet a wider variety of customer needs, and in general, all states – especially those with EV incentives and growing infrastructure investments – will have more available EVs for sale.
- At the same time, ongoing improvements have led to cleaner and more efficient light-duty vehicles; fuel economy has increased 30% since 2004, and tailpipe criteria emissions are over 99% cleaner than the 1960’s.



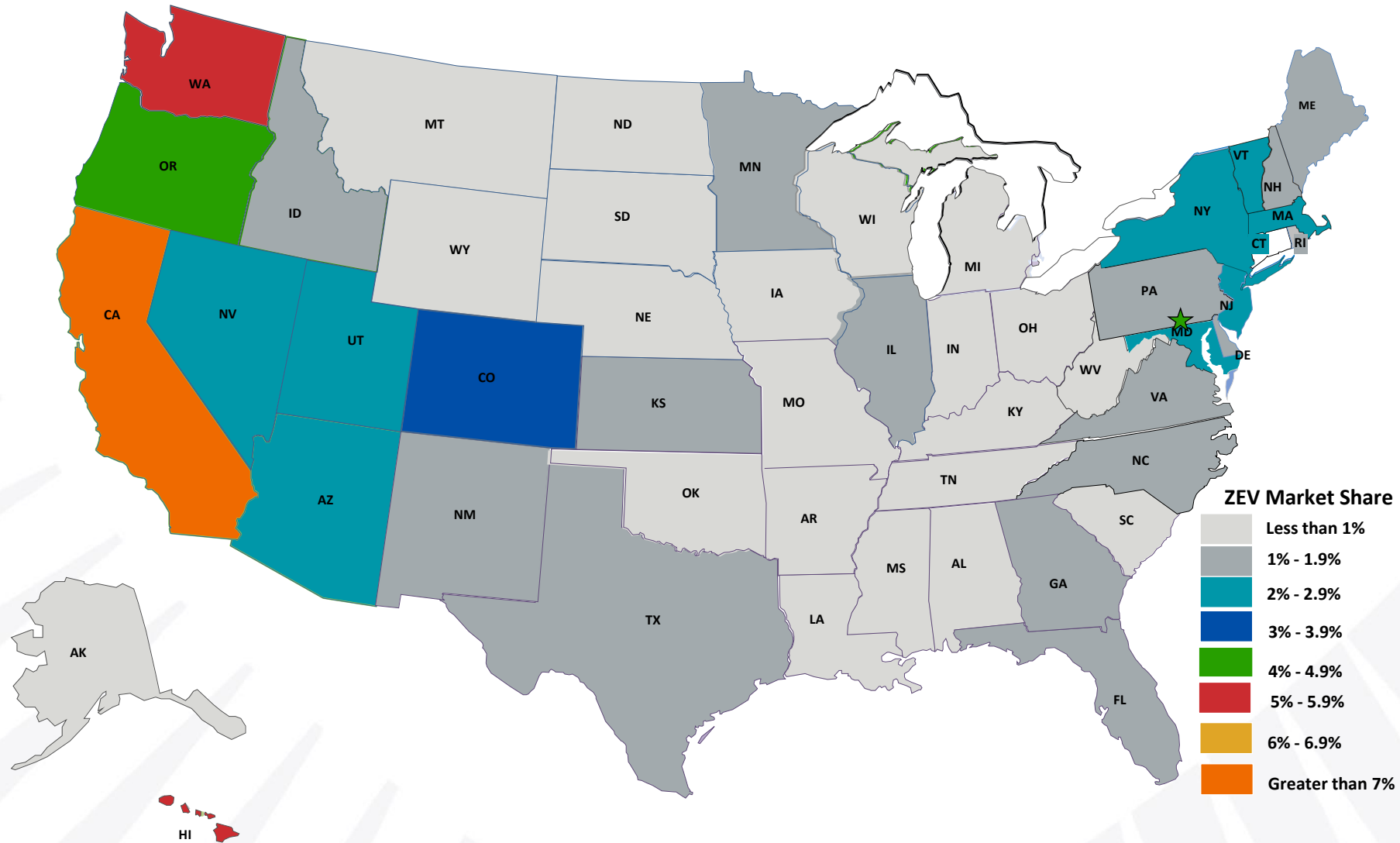
# Automakers Bringing More ZEVs to the Market!

## Estimated Number of FCEV, BEV, and PHEV Models

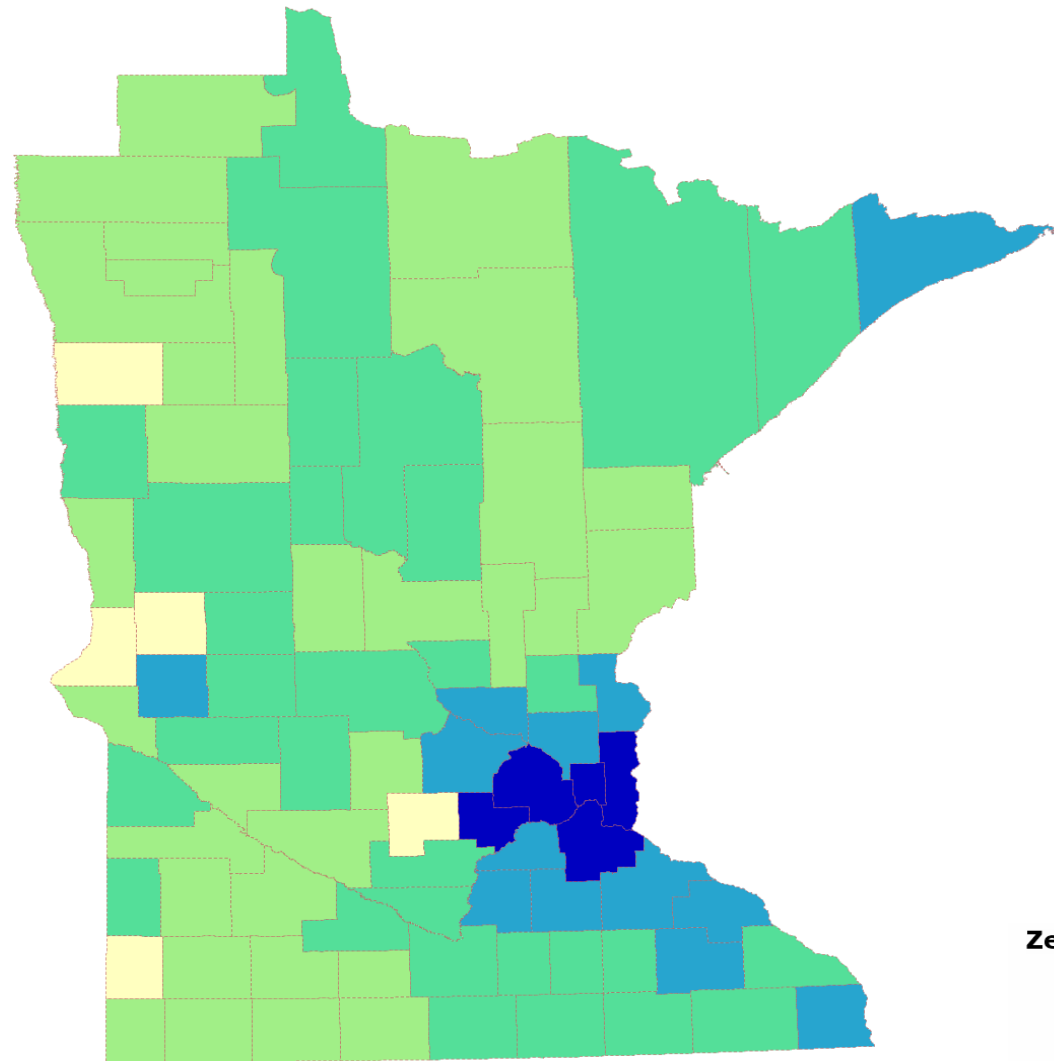


# Minnesota's ZEV Market

# ZEV Sales Market Share By State: January – August 2020



# Where are ZEVs Selling in Minnesota?



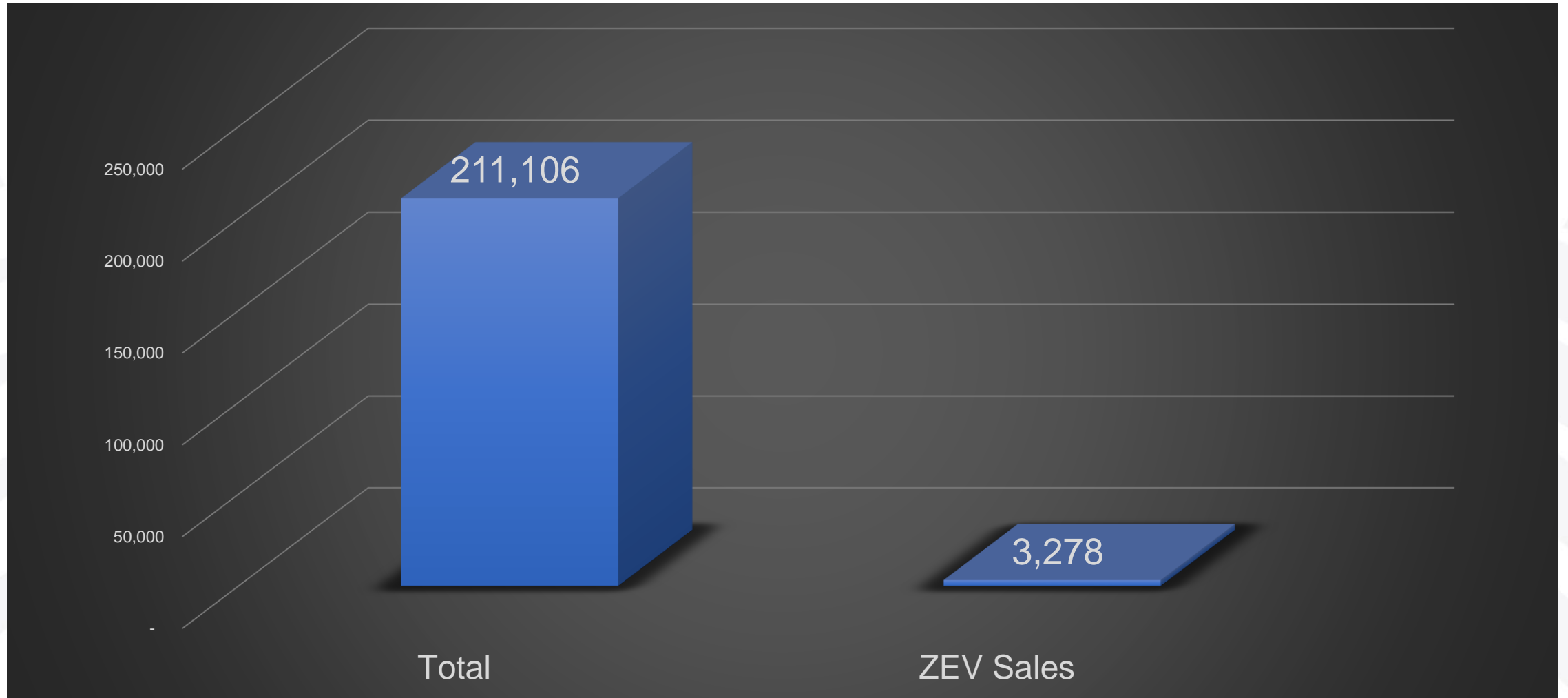
**Zero Emission Vehicles Per 10,000 Residents**

- Less than 1
- Between 1 and 5
- Between 5 and 10
- Between 10 and 25
- Between 25 and 50

Compiled by Alliance For Automotive Innovation, registered vehicles as of January 1, 2020

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# 2020 Auto Sales in Minnesota

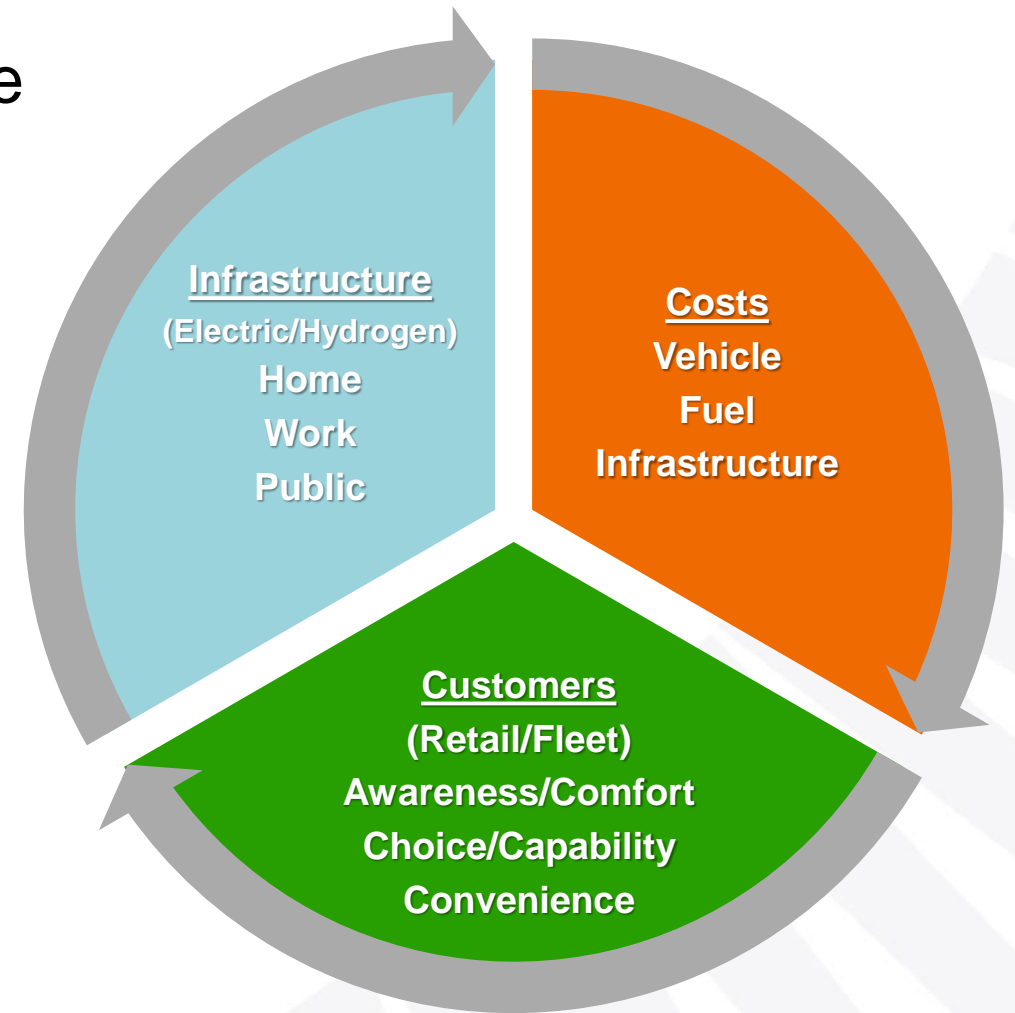




# Industry and the States – A Shared Commitment

# Electric Vehicle Future

- Governments and automakers around the world focused on electrification
- Goals can only be achieved with a coordinated, comprehensive, and sustained effort by all stakeholders
- Broad electrification must address infrastructure, costs, and customers
- Auto Innovators developing policies to align vehicle deployment with supportive measures



# The Auto Industry is Committed to an Electrified Future

- Automakers are committed to electrification of personal transportation
- Automakers will actively support necessary complementary policies:
  - Incentives
  - Infrastructure
  - Fleet purchase requirements that match sales requirements
  - Low carbon fuel standard
  - Building codes
  - Streamlined infrastructure permitting
  - R&D to reduce costs
- Automakers will actively support targeted consumer education programs including public and private fleet purchase requirements

# Minnesota Needs to Act Now

## Auto Innovators highly recommends adoption of complementary EV policies in Minnesota

- Purchase incentives - EVs go to markets with the most supportive conditions
- State programs that educate and encourage consumers and fleets to buy electric
- State fleet purchase requirements
- Utility investments in infrastructure
- Cleaner, more renewable grid
- EV-ready requirements for all new buildings
- Decarbonization of fuels through a low carbon fuels programs and using its revenue to fund vehicle rebates and infrastructure
- More electric charging infrastructure along major roadways
- Funding a network of hydrogen stations – Minnesota lacks California’s three available fuel cell electric vehicles due to a lack of infrastructure.
- Reduced tolls and HOV lane use for EVs



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*Transforming Personal Mobility*