COVID-19 Impacts on the ZEV Market

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First Public Workshop on the Fiscal Year 2022-23 Update to the Three-Year Plan for Light-Duty Vehicles and Clean Transportation Equity Investments
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Travel Demand impact

• Employment
• Commute
• Land-use changes
• Transit resistance and use change
• TNC resistance and price change
• Secondary effect – higher gas price

Higher demand for privately owned vehicles
External Factors

• Climate change awareness
• Political change
• Global EV market growth
• New EV models, electric pickup trucks
• Demand shift to larger vehicles
US Market Moving away from One OEM and one market segment?
More than 3 Million ZEV Sold in 2020 around 6 Million in 2021.

Global ZEV sales by Propulation and Segment

- BEV Cars
- BEV light Duty Truck
- PHEV Cars
- PHEV light Duty Truck
Market Share in the US is still around 3% while Norway is Pushing to 100% and the global market share is almost 10%
Supply Chain and market impact of COVID

- Total car sales dropped
- OEMs are focused on luxury segments and light-duty trucks
The transition to 100% market share and 100% clean fleet will require new policies, technologies, and research and is only starting now.

- The market shows high demand even with COVID.
- EVs for TNC will wait for new supply.
- New federal incentives will change the market.
- Electrifying trucks.
- Electrifying second car in the household will grow before MUDs.

California full LDV transition scenario
Thank You!

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