

Update To The Three-year Plan For Light-Duty Vehicle and Clean Transportation Equity Investments

February 10, 2022

Agenda

Time	Topic
12:30 p.m.	Introduction & Overview
12:45 p.m.	 ZEV Market and Technology Assessment Updates Trends in the Global, United States, and California ZEV Markets, CARB and the California New Car Dealers Association Progress towards ZEV sales goals, Center for Sustainable Energy ZEV Technology Assessment Update, CARB California ZEV Infrastructure Update, California Energy Commission COVID-19 Impacts on the ZEV Market, UC Davis ITS
2:15 p.m.	Break
2:25 p.m.	Clean Vehicle Rebate Project Trends / GHG & Cost-Effectiveness Metrics
3:15 p.m.	Clean Cars 4 All Update
3:45 p.m.	Financing Assistance Update
4:15 p.m.	Final Q&A and Next Steps
4:30 p.m.	Adjourn



Introduction & Overview



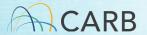
Overview of SB 1275 (2014)

- Charge Ahead California Initiative
- 1 million zero- & near-zero emission vehicles in California by 2023
- Changes to CVRP, including income cap
- Increase access to electric vehicles (EVs) for priority populations
- Long-term plan for CVRP and related programs
 - Began with 2016-17 Funding Plan
 - Update the plan at least every 3 years through January 1, 2023



Long-Term Plan Forecasting Requirements

- SB 1275:
 - 3 year forecast of funding needs
 - Market and technology assessment
 - Assessment of when self-sustaining market is expected
 - Update plan at least every 3 years
- Supplemental Report of the 2018-19 Budget Act:
 - Annual update of CVRP forecast until 2030
 - Projected sales figures of EVs
 - Assessment of marketing efforts of EVs by automobile manufacturers



Zero Emission Vehicle (ZEV) Market Goals

- ZEV Deployment Goals
 - 1 million by 2023
 - 1.5 million by 2025
 - 5 million by 2030
- All new vehicles must be electric by 2035
- Fleet turnover by 2040



Framework of Long-Term Plan

- 3 year funding forecast for CVRP, CC4A, and Financing Assistance
 - Forecast based on program demand in recent years
 - Forecast growth needed to meet 2023, 2025, and 2030 ZEV deployment goals
- Request input on these approaches, suggestions for other potential forecasting methods
- Evaluate when self-sustaining market may be reached
 - Will present update on indicators that will help refine analysis as market evolves
 - Due to market dynamics, exact timeline can not be predicted



Framework of Long-Term Plan

- Updates on
 - Battery and Fuel cell system and storage cost
 - Incremental cost of plug-in electric vehicles
 - ZEV charging infrastructure
- Focus on status of ZEV technology, consumer preferences, and an equitable transition to electric
- Analysis of the used ZEV market



Framework of Long-Term Plan

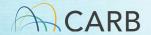
- Examine recent and ongoing research
- Assessment of how vehicle purchase incentives may be modified based on:
 - Expected changes in market conditions
 - · Increased focus on an equitable transition to electric
- Separate but coordinated effort to update the long-term plan for clean mobility investments



Questions?

 Use the raised hand function (#2 if calling in by phone) or submit your question or comment in the Q&A box on Zoom.

 Please state your name and affiliation before asking a question or making a comment.



ZEV Market and Technology Assessment Updates



Global EV Market Update

- By the end of 2020, there were over 10 million electric vehicles on the world's roads.
 - Battery electric vehicles (BEVs) accounted for two-thirds of the global EV stock
- Top Global EV Fleets
 - China: 4.5 million EVs
 - Europe: 3.2 million EVs
 - United States: 1.8 million EVs



United States EV Market Update

- Over 295,000 new plug-in electric vehicles (PEV) registered in 2020 alone
 - BEVs accounted for nearly 78% of this total
- All-electric market share grew to 2.9% through Q3 of 2021 (up from 1.8% in 2020)
- Top 4 states with highest PEV share: California, Texas, Florida, and Washington
 - Account for more than half of the country's EVs



California EV Market Update

Anthony Bento, California New Car Dealers
Association



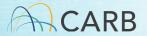
Progress Towards California ZEV Sales Goals

John Anderson, Center for Sustainable Energy



ZEV Technology Assessment

Ryan Hart & Andrew Martinez, CARB



California ZEV Infrastructure Update

Brian Fauble, California Energy Commission



COVID-19 Impacts on the ZEV Market

Dr. Gil Tal, UC Davis Institute of Transportation Studies

Break



CVRP Trends / GHG & Cost-Effectiveness Metrics

CARB and the Center for Sustainable Energy



Snapshot of CVRP Statistics

- Over \$1 billion invested since 2010
 - 448,000+ rebates issued
- Equity Statistics
 - 115,000+ rebates totaling nearly \$307 million (~30% of funding) benefitting priority populations
- FY 2021-22 Funding Allocation
 - \$515 million to last through FY 2023-24



CC4A Program Updates Anthony Poggi, CARB



Program Background & Statistics

- \$190 million allocated to-date
- Funded more than 12,000 vehicle replacements
- Maximum Incentive Amounts
 - ZEV or PHEV: \$9,500
 - Hybrid: \$7,000
 - Mobility Option: \$7,500
 - EVSE or Charge Card: \$2,000





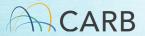






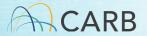
District Status & Program Changes

- District Program Status
 - South Coast, Bay Area & San Joaquin: Open
 - Sac Metro: Temporarily Closed
 - San Diego: Coming Soon
- 2021-2022 Funding Plan Changes
 - Flexibilities for incentive amounts, vehicle technologies, and lowering of income cap
 - Statewide Expansion
 - Changes may be implemented after program guideline update



Financing Assistance Program Updates

Ali Koohestani, CARB



Project Goals

- Facilitate access to affordable and fair financing
- Provide additional health, economic, and social benefits to low-income communities.
 - Program goals and objectives will be updated through this year's funding plan process to institute measurable social goals.



Project Background & Current Status

- Started a pilot in small-scale in Northern California in 2015
- Expanded to Statewide in 2018
- More than \$43 million allocated
- More than 4,600 vehicle grants issued
- More than 1,700 EVSE grants provided
- Facilitated more than 1,500 low-interest loans

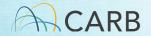


Project Revamp

- Adopting needs-based model
- Expanding partnership with CBOs and local communities
- Expanding partnership with more banks and credit unions
- New solicitation release planned for March 2021



Final Q&A and Next Steps CARB



Questions?

 Use the raised hand function (#2 if calling in by phone) or submit your question or comment in the Q&A box on Zoom.

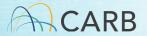
 Please state your name and affiliation before asking a question or making a comment.



Next Steps

Funding Plan Development and Long-Term Plan

Date	Milestone
February 17	First clean mobility focused work group for the Long-Term Plan
Late March	Second light-duty vehicle focused workshop for the Long-Term Plan
Mid-May	Governor releases revised 2022-23 Budget proposal
Late May	Third light-duty vehicle focused workshop for the Long-Term Plan
March-July	Various public workshops and work groups for the FY 2022-23 Funding Plan
Fall 2022	Release proposed 2022-23 Funding Plan, w/ long-term plan for consideration at late-2022 Board meeting



CARB Contact Information

- CARB Vehicle Purchase Incentives Lead Staff
 - CVRP:Raquel Leon, Raquel.Leon@arb.ca.gov
 - CC4A: Anthony Poggi, Anthony.Poggi@arb.ca.gov
 - Financing Assistance: Ali Koohestani, Ali.Koohestani@arb.ca.gov

Subscribe to CARB's GovDelivery listserv



Thank you for participating!

