

West Coast Electric Highway:

Building a Robust PEV Market in the
US through Regional Collaboration

The 27th Electric Vehicle Symposium & Exhibition
November 19, 2013
Barcelona, Spain

Presentation Roadmap

- I. Setting the Stage: The West Coast of the US
- II. An Introduction to Drive Oregon
- III. Oregon
- IV. Washington
- V. California
- VI. Conclusions, Audience Q&A



The West Coast of the United States: Key Statistics



- Total Population: 52.3 million
- Combined GDP: \$2.5 trillion
- Total Area: 863,823 km²

Electric Vehicle Deployment on the West Coast: History

- Regional Cultural Trends
- CA, WA, and OR = Highest % market share of hybrid vehicle sales in USA
- Supportive policies for HEV and PEV purchases (Incentives, Zero Emission Vehicle (ZEV) Mandates, etc.)



Electric Vehicle Deployment on the West Coast: Current Numbers

- USA = Largest plug-in electric vehicle fleet in the world, 46% of total global market
 - 150,000 sold since 2008
 - 78,000 alone in 2013
- West Coast region is a top market
 - California = 40% of total PEV sales (2011-2012)
 - Coastal cities are top markets for LEAF sales (2013) (Including Portland, Seattle, San Francisco, Los Angeles, San Diego, Sacramento)
 - In Portland & Seattle, the LEAF is outselling all other Nissan models

Electric Vehicle Deployment on the West Coast: Future Trends

- Pike Research: Total PEV sales in largest 102 American cities will reach 1.8 million from 2012 - 2020
 - 25% of sales concentrated in top five metropolitan areas: Los Angeles, San Francisco, Seattle, and Portland, and New York City.
- Navigant Research: Annual PEV sales will reach 416,000 by 2022
 - Top sales markets = California, Oregon, Washington, and Hawaii

Drive Oregon



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