GET CONNECTED

ELECTRIC VEHICLE QUARTERLY REPORT

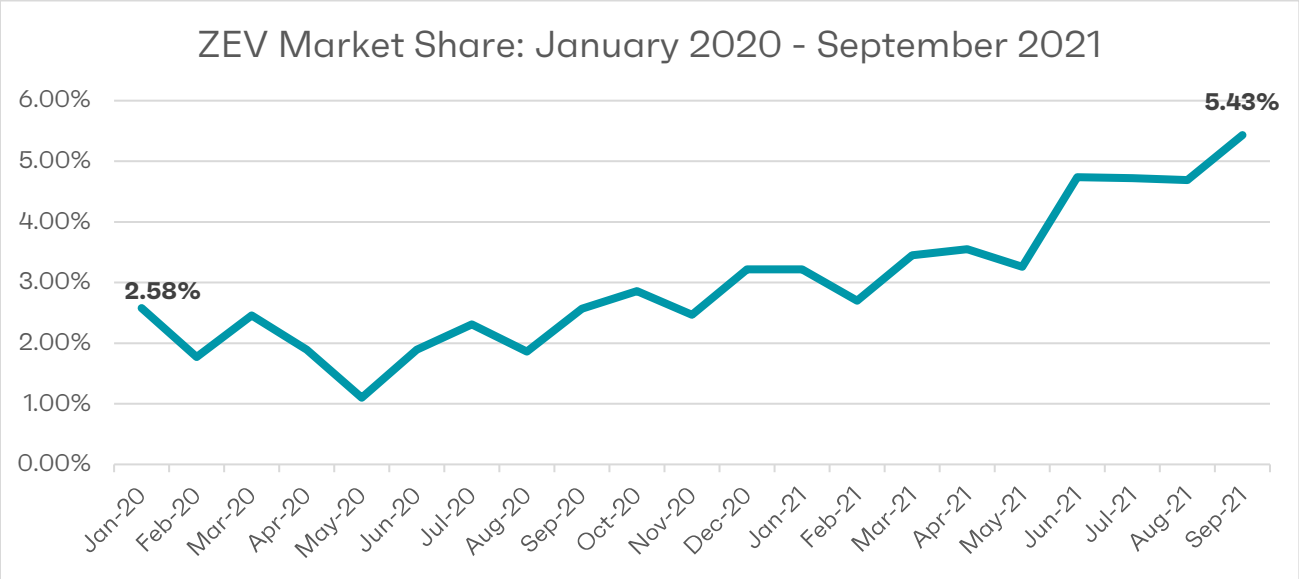
ALLIANCE FOR AUTOMOTIVE INNOVATION

THIRD QUARTER, 2021

Contents

Zero Emission Vehicle Sales Overview (2021)

More than 168,500 zero emission vehicles ("ZEV," including battery, plug-in hybrid, and fuel cell electric vehicles; BEV, PHEV, and FCEV, respectively) were sold in the third quarter in the United States. These ZEV sales were nearly even, by volume, with the second quarter, despite nearly a million units less in overall light-duty vehicle sales volume in the third quarter. Year-over-year, the third quarter had 82,000 more ZEV unit sales than the same period in 2020. For the months of July – September, ZEVs represented 4.9 percent of overall light-duty vehicle sales, the highest for any quarter to date and a 1.1 percentage point (pp) increase over the second quarter[1]. Year-to-date, ZEV sales average 3.9 percent.[2] For comparison, internal combustion engine vehicle sales decreased by 2.1 pp during the third quarter compared to the second quarter and nearly 6 percent compared against the same quarter a year ago[3].



[1] The "Get Connected: Electric Vehicle Report" for the second quarter is available.

[2] For the full year 2020, ZEVs comprised just two percent, or roughly 320,000 of the nation's 14.5 million new light-duty vehicle sales.

[3] Hybrid vehicles comprised the remainder of the gains in vehicle share.

Zero Emission Vehicle Adoption by Segment

While passenger cars once dominated the ZEV market, new models are being introduced, especially in the crossover utility vehicle (CUV) segment. As a result, other segments are starting to make gains. Monthly sales of BEV and PHEV CUVs have grown from less than 16 percent of ZEVs at the start of 2020 to an average of 52 percent in the third quarter of 2021 (averaging 51 percent of ZEV sales since the start of the year).

Plug-in hybrid SUVs entered the market in 2019 and account for a relatively small share of ZEV sales.

The very first commercially available zero-emission pickup trucks arrived in September 2021 – with more models and deliveries expected soon.

Light truck – CUVs, SUVs, minivans, and pickups – sales comprise nearly 60 percent of the ZEV market.

ZEV Model Availability

68 Vehicle Models Sold in Q3 2021:

22 Battery Electric Vehicles
- 11 Cars
- 10 CUVs
- 1 Pickup

43 Plug-in Hybrid Vehicles
- 21 Cars
- 17 CUVs
- 4 SUVs
- 1 Van

3 Fuel Cell Electric Vehicles
- 2 Cars
- 1 CUV

See more information about ***EV CHOICE HERE***

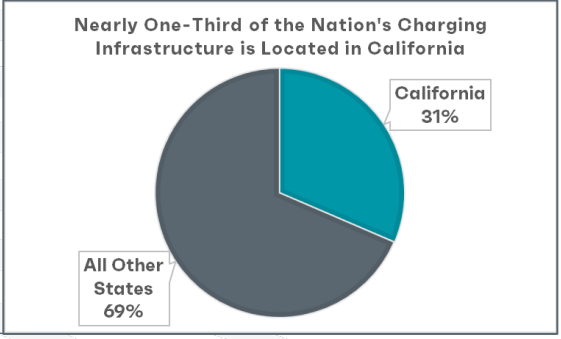
U.S. Public Charging Infrastructure

While the U.S. Department of Energy notes that roughly 80 percent of all electric vehicle charging occurs at home, reliable and convenient access to charging and refueling stations support customers that adopt ZEVs. Publicly available charging infrastructure not only eases perceived "range anxiety" concerns but also increases consumer awareness of the technology. The Infrastructure Investment and Jobs Act, passed in the fourth quarter of 2021, sets aside $5 billion to be granted to states to deploy EV charging stations in the U.S. and $2.5 billion in grants to public entities to deploy publicly-available EV charging, hydrogen fueling, propane fueling, and natural gas fueling infrastructure through 2026. Here is a snapshot of ZEV charging and refueling infrastructure available at the end of the third quarter[1] across the United States:

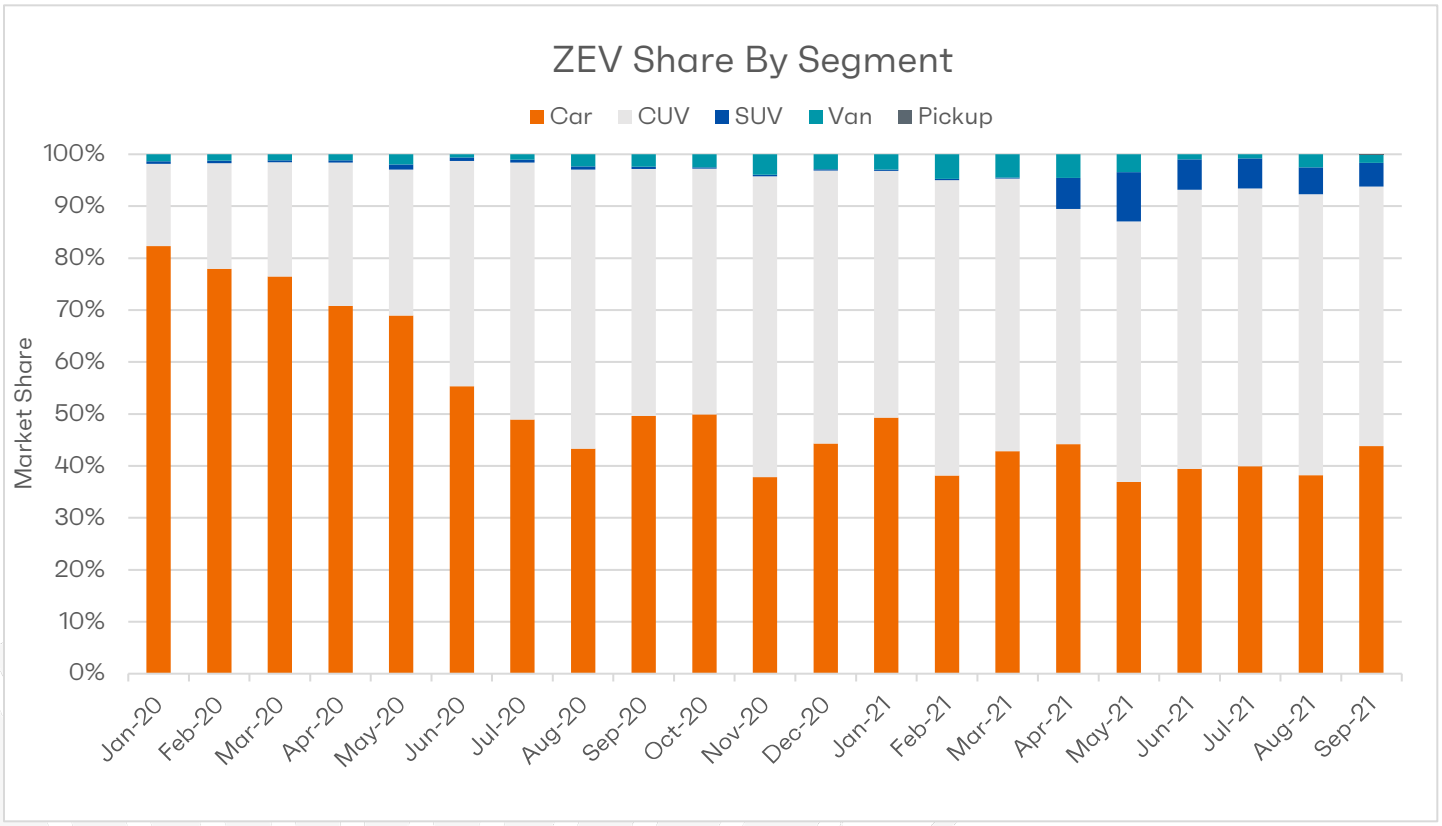
Level 2: 39,779 Locations, 87,630 EVSE Ports (+13% since 1/1/21)
DC Fast: 5,409 Locations, 19,746 EVSE Ports (+13% since 1/1/21)
Hydrogen Refueling: 48 Stations (47 of 48 are in California)
U.S. Total: *45,237 Locations, 107,425 EVSE Ports* (+13% since 1/1/21)

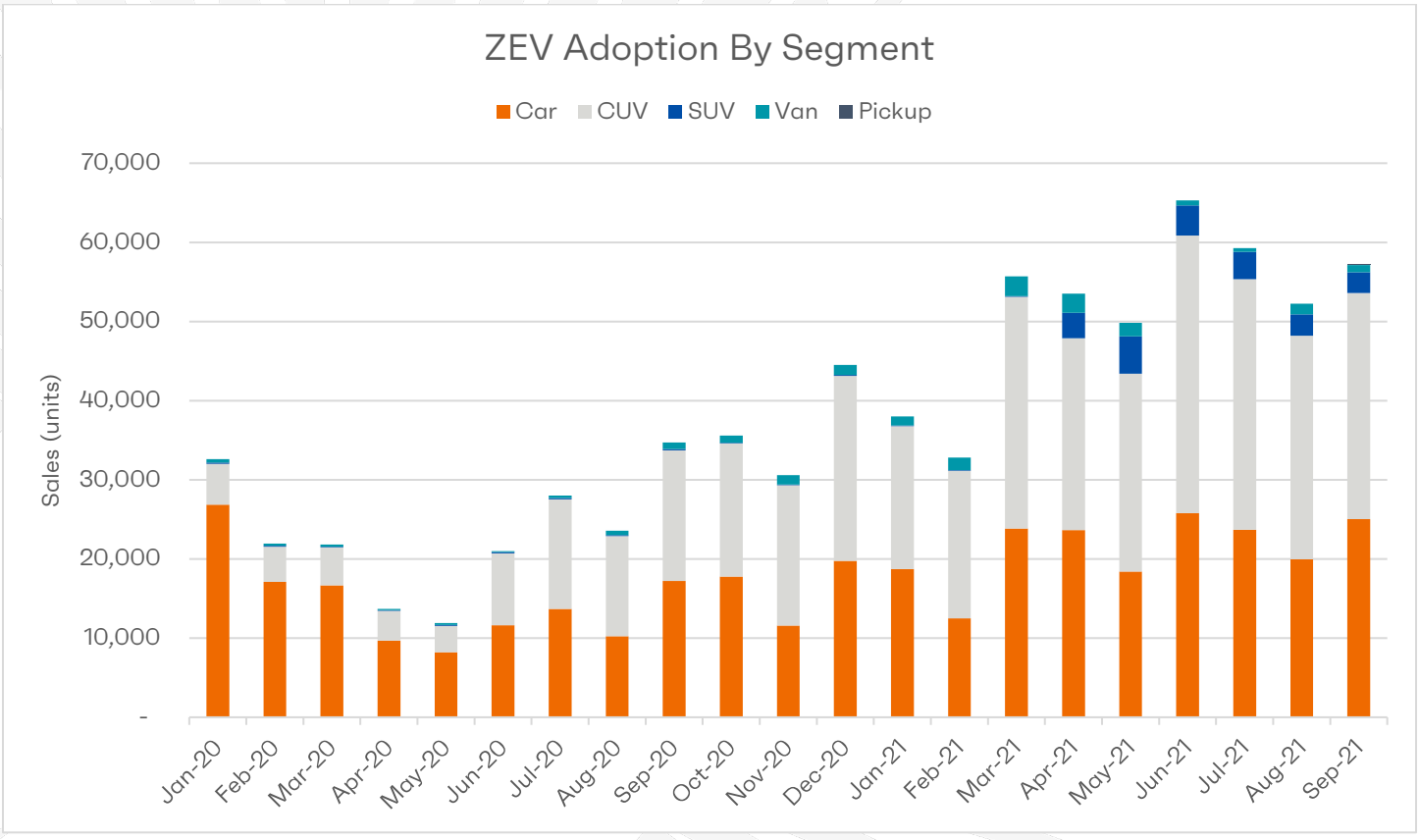
See more about state-by-state charging infrastructure on page 7

See Recommended Attributes for EV Charging Stations



[1] Charging information from U.S. Department of Energy Alternative Fuels Data Center, as captured on 9/27/2021 & 1/1/2021





Source: Figures compiled by Alliance for Automotive Innovation with new registrations for retail and fleet data provided by IHS Markit covering January 1, 2020 – September 30, 2021

Zero Emission Vehicle Adoption by State

For the Third Quarter:

California continues to lead the nation in ZEV adoption, with nearly 14 percent of new light-duty vehicle registrations in the third quarter of 2021 comprising BEVs, PHEVs and FCEVs. There are currently eleven additional states (Hawaii, Washington, Oregon, Colorado, Nevada, Massachusetts, Connecticut, Vermont, Maryland, New Jersey, and Utah) and the District of Columbia with new vehicle ZEV registrations above 5 percent, six more states than in the second quarter. Additionally, twelve states have new vehicle ZEV registrations above 3 percent. Nationally, ZEV new vehicle registrations in July 2021 – September 2021 was 4.9 percent, a 1.1 pp from the second quarter of 2021.

The market share of new ZEV vehicles registered increased in all states, year-over-year, in the third quarter of 2021. Nineteen states witnessed increased market share of ZEVs by 2 pp or more. Fifteen states had more than a 3 pp increase. Making the largest increases were the District of Columbia (6.8 pp), California (6.8 pp), Connecticut (4.1 pp), Washington (3.9 pp), and Oregon (3.7 pp). The national average increased by 2.7 pp (from 2.3 percent to 4.9 percent ZEV sales.)

For the First Three Quarters of the Year:

Through the first three quarters of the year, ZEV sales represented 3.9 percent of the market – a 1.9 pp increase over the same period of 2020. Nearly 12 percent of sales in California were ZEV, but making the biggest moves in market share was the District of Columbia, which improved its year-over-year standing by nearly 5 pp. Following D.C., the states with the largest market share gains were California (4.5 pp), Hawaii (3.1), Oregon (2.7), and Connecticut (2.7). Fourteen states in total increased their year-over-year ZEV market share by 2 pp or more. Sixteen states improved by less than 1 pp.

Some states continue to have strong ZEV sales, like California (11.9 percent), D.C. (10.4 percent), Hawaii (7.7 percent), Washington (7 percent), Oregon (6.9 percent) and Colorado (5.6 percent). However, 22 states had new ZEV registrations of less than 2 percent. All states had a market share above 0.5 percent.

See Additional Historic Data on ZEV Sales Here

Third Quarter 2021, New Light-Duty Vehicle Registrations By Powertrain					Change In Market Share (2021 Q3 vs 2020 Q3), New Light-Duty Vehicle Registrations Powertrain			
State	Advanced Powertrain Market Share				Advanced Powertrain Market Share			
	PHEV	BEV	FCEV	ZEV	PHEV	BEV	FCEV	ZEV
AK	0.54%	1.08%	0.00%	**1.62%**	0.43%	0.34%	0.00%	**0.77%**
AL	0.36%	0.98%	0.00%	**1.34%**	0.28%	0.50%	0.00%	**0.78%**
AR	0.43%	0.87%	0.00%	**1.30%**	0.35%	0.55%	0.00%	**0.90%**
AZ	0.85%	4.14%	0.00%	**4.98%**	0.57%	2.93%	0.00%	**3.49%**
CA*	3.05%	10.69%	0.21%	**13.95%**	1.37%	5.28%	0.15%	**6.79%**
CO*	1.92%	4.94%	0.00%	**6.86%**	1.09%	1.91%	0.00%	**3.00%**
CT*	2.44%	3.85%	0.00%	**6.29%**	1.79%	2.35%	0.00%	**4.14%**
DC	5.01%	7.83%	0.00%	**12.85%**	3.20%	3.64%	0.00%	**6.84%**
DE	1.08%	2.66%	0.00%	**3.74%**	0.56%	1.03%	0.00%	**1.60%**
FL	0.68%	3.16%	0.00%	**3.84%**	0.48%	1.47%	0.00%	**1.95%**
GA	0.66%	2.50%	0.00%	**3.16%**	0.44%	1.33%	0.00%	**1.76%**
HI	1.84%	7.36%	0.00%	**9.20%**	0.89%	2.54%	-0.02%	**3.41%**
IA	0.70%	1.35%	0.00%	**2.05%**	0.54%	0.79%	0.00%	**1.33%**
ID	0.58%	1.79%	0.00%	**2.37%**	0.27%	1.01%	0.00%	**1.28%**
IL	0.94%	2.56%	0.00%	**3.50%**	0.68%	1.00%	0.00%	**1.68%**
IN	0.71%	1.70%	0.00%	**2.41%**	0.53%	0.79%	0.00%	**1.32%**
KS	0.62%	1.65%	0.00%	**2.27%**	0.34%	0.63%	0.00%	**0.97%**
KY	0.51%	1.28%	0.00%	**1.79%**	0.36%	0.71%	0.00%	**1.07%**
LA	0.32%	0.64%	0.00%	**0.97%**	0.26%	0.32%	0.00%	**0.58%**
MA*	2.54%	3.76%	0.00%	**6.30%**	1.59%	1.50%	0.00%	**3.09%**
MD*	1.96%	4.16%	0.00%	**6.12%**	1.32%	1.78%	0.00%	**3.10%**
ME*	2.10%	1.82%	0.00%	**3.93%**	1.19%	1.01%	0.00%	**2.20%**
MI	0.93%	1.33%	0.00%	**2.26%**	0.81%	0.71%	0.00%	**1.51%**
MN	0.85%	2.36%	0.00%	**3.20%**	0.46%	1.10%	0.00%	**1.56%**
MO	0.65%	1.54%	0.00%	**2.19%**	0.40%	0.71%	0.00%	**1.11%**
MS	0.23%	0.60%	0.00%	**0.83%**	0.20%	0.35%	0.00%	**0.55%**
MT	0.75%	1.24%	0.00%	**1.99%**	0.46%	0.51%	0.00%	**0.97%**
NC	0.90%	2.41%	0.00%	**3.31%**	0.69%	1.16%	0.00%	**1.86%**
ND	0.38%	0.52%	0.00%	**0.90%**	0.32%	0.33%	0.00%	**0.64%**
NE	0.97%	1.29%	0.00%	**2.25%**	0.78%	0.51%	0.00%	**1.29%**
NH	1.23%	1.57%	0.00%	**2.80%**	0.84%	0.61%	0.00%	**1.45%**
NJ*	1.51%	4.44%	0.00%	**5.95%**	1.01%	2.02%	0.00%	**3.03%**
NM	0.71%	1.59%	0.00%	**2.29%**	0.40%	0.82%	0.00%	**1.22%**
NV	1.14%	5.40%	0.00%	**6.54%**	0.69%	2.74%	0.00%	**3.43%**
NY*	1.79%	2.72%	0.00%	**4.52%**	1.03%	1.21%	0.00%	**2.24%**
OH	0.66%	1.66%	0.00%	**2.33%**	0.51%	0.70%	0.00%	**1.21%**
OK	1.52%	1.80%	0.00%	**3.31%**	1.47%	1.58%	0.00%	**3.05%**
OR*	2.82%	5.47%	0.00%	**8.29%**	1.59%	2.14%	0.00%	**3.72%**
PA	0.93%	1.91%	0.00%	**2.84%**	0.58%	1.09%	0.00%	**1.67%**
RI*	2.12%	2.32%	0.00%	**4.44%**	1.38%	1.04%	0.00%	**2.41%**
SC	0.60%	1.51%	0.00%	**2.11%**	0.45%	0.88%	0.00%	**1.33%**
SD	0.35%	0.69%	0.00%	**1.05%**	0.23%	0.40%	0.00%	**0.64%**
TN	0.53%	1.87%	0.00%	**2.40%**	0.39%	1.05%	0.00%	**1.44%**
TX	0.53%	2.35%	0.00%	**2.88%**	0.37%	1.52%	0.00%	**1.89%**
UT	1.03%	4.46%	0.00%	**5.49%**	0.56%	2.49%	0.00%	**3.04%**
VA	1.14%	3.22%	0.00%	**4.36%**	0.73%	1.55%	0.00%	**2.28%**
VT*	2.95%	3.18%	0.00%	**6.13%**	1.85%	1.65%	0.00%	**3.50%**
WA*	1.30%	7.28%	0.00%	**8.57%**	0.58%	3.28%	0.00%	**3.86%**
WI	0.59%	1.64%	0.00%	**2.23%**	0.40%	0.81%	0.00%	**1.21%**
WV	0.54%	0.68%	0.00%	**1.22%**	0.41%	0.37%	0.00%	**0.78%**
WY	0.46%	0.54%	0.00%	**1.00%**	0.37%	-0.02%	0.00%	**0.35%**
U.S.	**1.27%**	**3.64%**	**0.02%**	**4.93%**	**0.78%**	**1.87%**	**0.02%**	**2.68%**

*Denotes states that have adopted California's ZEV program

Source: Figures compiled by Alliance for Automotive Innovation with new registrations for retail and fleet data provided by IHS Markit covering July 1, 2020 – September 30, 2020, and July 1, 2021 – September 30, 2021

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AR	0.34%	0.65%	0.00%	**0.99%**	0.28%	0.40%	0.00%	**0.68%**
AZ	0.75%	3.05%	0.00%	**3.79%**	0.47%	1.63%	0.00%	**2.10%**
CA*	3.11%	8.60%	0.20%	**11.91%**	1.52%	2.81%	0.14%	**4.47%**
CO*	1.51%	4.10%	0.00%	**5.60%**	0.87%	1.53%	0.00%	**2.41%**
CT*	1.91%	2.82%	0.00%	**4.73%**	1.31%	1.37%	0.00%	**2.68%**
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IA	0.63%	0.98%	0.00%	**1.61%**	0.52%	0.57%	0.00%	**1.09%**
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KS	0.58%	1.37%	0.00%	**1.94%**	0.38%	0.57%	0.00%	**0.95%**
KY	0.42%	0.90%	0.00%	**1.32%**	0.30%	0.45%	0.00%	**0.75%**
LA	0.25%	0.50%	0.00%	**0.75%**	0.20%	0.27%	0.00%	**0.47%**
MA*	2.08%	3.01%	0.00%	**5.09%**	1.26%	1.11%	0.00%	**2.37%**
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WY	0.47%	0.55%	0.00%	**1.01%**	0.40%	0.20%	0.00%	**0.60%**
U.S.	**1.09%**	**2.80%**	**0.02%**	**3.92%**	**0.67%**	**1.17%**	**0.02%**	**1.86%**

*Denotes states that have adopted California's ZEV program

Source: Figures compiled by Alliance for Automotive Innovation with new registrations for retail and fleet data provided by IHS Markit covering January 1, 2020 – September 30, 2020 and January 1, 2021 – September 30, 2021

REGISTRATIONS AND INFRASTRUCTURE

Public Charging Outlets And Registerd EVs (Q3)									
	EV Level 2	EV DC Fast	H2** Fueling	Total	Percent ZEVs of Total VIO***	Share of Registered ZEVs****	ZEVs Per Charger	Additional Chargers Needed to Support 25% ZEV VIO*****	ZEVs Per 10K Residents
AK	62	4	-	66	0.29%	0.08%	25.32	20,663	20.67
AL	380	94	-	474	0.14%	0.34%	14.63	180,800	12.24
AR	346	66	-	412	0.12%	0.16%	7.98	98,595	9.45
AZ	1,538	409	-	1,947	0.76%	2.58%	26.79	241,594	64.87
CA*	27,682	6,091	47	33,820	2.57%	40.07%	23.97	1,094,744	191.44
CO*	2,758	500	-	3,258	0.85%	2.21%	13.75	185,356	71.09
CT*	909	286	-	1,195	0.66%	0.99%	16.71	106,232	50.40
DC	605	39	-	644	1.61%	0.27%	8.54	11,538	69.11
DE	178	81	-	259	0.51%	0.23%	17.76	32,207	42.08
FL	4,540	1,051	-	5,591	0.62%	5.59%	20.24	644,230	46.41
GA	2,995	554	-	3,549	0.45%	2.08%	11.86	329,201	36.05
HI	656	84	1	741	1.46%	0.85%	23.21	41,434	108.84
IA	341	157	-	498	0.21%	0.32%	13.12	113,004	18.39
ID	181	80	-	261	0.29%	0.28%	21.87	69,388	28.88
IL	1,781	452	-	2,233	0.48%	2.42%	21.92	362,149	35.10
IN	586	241	-	827	0.26%	0.78%	19.20	217,788	21.43
KS	821	110	-	931	0.25%	0.36%	7.76	101,600	22.73
KY	310	83	-	393	0.16%	0.33%	16.91	146,280	13.00
LA	254	81	-	335	0.12%	0.22%	13.43	136,080	8.17
MA*	3,710	356	-	4,066	0.87%	2.36%	11.76	191,532	62.27
MD*	2,277	497	-	2,774	0.79%	1.98%	14.46	178,110	60.21
ME*	404	127	-	531	0.50%	0.33%	12.59	46,895	43.37
MI	1,228	388	-	1,616	0.35%	1.47%	18.36	301,269	26.63
MN	952	206	-	1,158	0.40%	1.04%	18.10	184,761	33.22
MO	1,818	215	-	2,033	0.27%	0.76%	7.58	200,152	22.58
MS	211	70	-	281	0.07%	0.10%	7.55	106,501	6.21
MT	99	102	-	201	0.16%	0.12%	11.81	52,030	18.50
NC	1,818	410	-	2,228	0.37%	1.76%	15.95	336,385	30.35
ND	73	61	-	134	0.09%	0.04%	5.43	28,302	7.51
NE	256	74	-	330	0.21%	0.21%	13.05	74,271	19.77
NH	209	89	-	298	0.50%	0.33%	22.52	47,654	43.41
NJ*	1,079	503	-	1,582	0.77%	2.73%	34.93	253,270	54.56
NM	262	125	-	387	0.31%	0.30%	15.77	69,891	25.64
NV	908	299	-	1,207	0.87%	1.06%	17.81	86,692	61.20
NY*	5,731	730	-	6,461	0.76%	4.40%	13.79	410,735	40.21
OH	1,435	333	-	1,768	0.30%	1.59%	18.22	381,848	24.61
OK	315	654	-	969	0.21%	0.46%	9.53	155,201	16.27
OR*	1,644	418	-	2,062	1.14%	2.11%	20.70	131,188	93.33
PA	1,964	456	-	2,420	0.37%	2.04%	17.06	396,779	29.06
RI*	442	35	-	477	0.49%	0.21%	8.76	29,686	34.53
SC	599	155	-	754	0.20%	0.52%	13.99	185,365	17.78
SD	80	63	-	143	0.13%	0.06%	8.84	35,224	12.11
TN	1,143	212	-	1,355	0.26%	0.86%	12.83	235,581	22.71
TX	4,099	790	-	4,889	0.40%	4.68%	19.37	837,769	28.44
UT	1,560	195	-	1,755	0.72%	1.04%	11.96	101,636	59.51
VA	1,778	670	-	2,448	0.53%	1.97%	16.25	267,318	41.72
VT*	688	74	-	762	1.04%	0.29%	7.67	19,250	80.52
WA*	2,985	700	-	3,685	1.18%	4.12%	22.64	248,585	102.57
WI	654	140	-	794	0.29%	0.76%	19.27	190,392	23.79
WV	196	61	-	257	0.12%	0.09%	7.07	55,317	8.94
WY	90	75	-	165	0.13%	0.04%	5.07	23,216	12.77
U.S.	**87,630**	**19,746**	**49**	**107,425**	**0.72%**	**100.00%**	**18.83**	**9,995,686.86**	**56.12**

REGISTRATIONS

ZEV registrations as a share of overall light-duty vehicles stands at 0.7 percent of all registered vehicles in the U.S. (as of September 1, 2021)

Through the first three quarters of 2021, California accounted for 40% of all registered light-duty ZEVs in the United States.

States with highest portion of total ZEVs registered in the U.S.:

1. CA* (810,622, 40%)
2. FL (113,134, 5.6%)
3. TX (94,706, 4.7%)
4. NY* (89,068, 4.4%)
5. WA* (83,432, 4.1%)
6. NJ* (55,262, 2.7%)
7. AZ (52,153, 2.6%)
8. IL (48,955, 2.4%)
9. MA* (47,804, 2.4%)
10. CO* (44,805, 2.2%)

States with highest share of registered ZEVs per 10,000 residents:

1. CA*
2. HI
3. WA*
4. OR*
5. VT*
6. CO*
7. DC
8. AZ
9. MA*
10. NV

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*Denotes states that have adopted California's ZEV program; **Hydrogen count denotes stations;
*** VIO is vehicles in operation; **** State share of U.S. Total
*****Calculated at 1:7 ratio at 25 percent of the existing state fleet. Ratio derived from CEC AB 2127 Report of July 14, 2021
Source: Figures compiled by Alliance for Automotive Innovation with registered vehicle data provided by IHS Markit as of September 30, 2021; Charging information from U.S. Department of Energy Alternative Fuels Data Center, as of 9/27/2021