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California Plug-in Electric Vehicle (PEV) Registration Trends & Analysis

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Notes about the following slides

- EV = electric-drive vehicle = HEVs + PEVs + FCEVs
 - HEVs = gasoline-only hybrid EVs (aka “hybrids”)
 - FCEVs = fuel-cell EVs
 - PEVs = plug-in electric vehicles (aka “plug-ins”) = BEVs + PHEVs
 - BEVs = all-battery EVs (aka “all-electric”)
 - PHEVs = plug-in hybrid EVs (aka “plug-in hybrids”)
- CA = California
- Data presented for 11 models described herein only. Also excludes low-speed/neighborhood-electric and medium-/heavy-duty vehicles
- Figure legend order reflects sequence of vehicle introduction.
- Calculations based on PEV vehicle registration data from R&L Polk & Co.

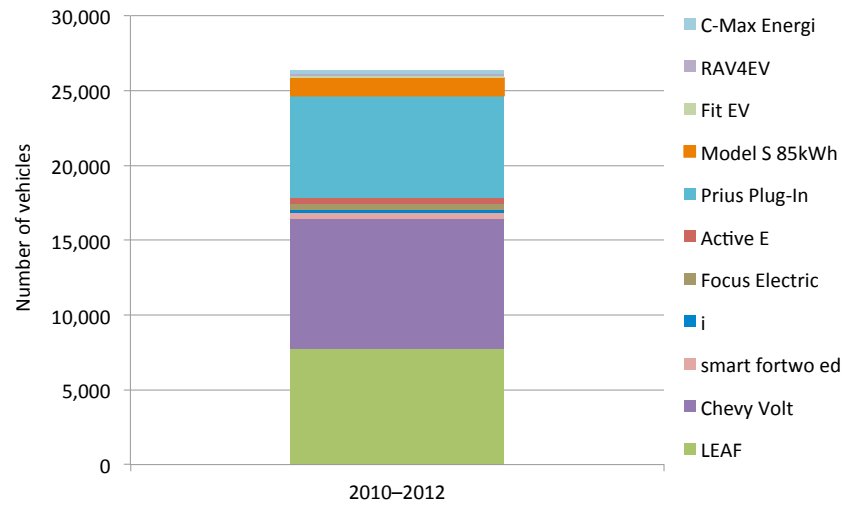
Where are we with PEVs?

Cumulative California registrations

Cumulative California registrations by PEV type



Cumulative CA registrations by PEV model



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What does the market look like?

Market share
Registration-weighted average characteristics

California PEV market share (in order of vehicle release)

Model	Type	Share of CA reg. thru '12	Share of U.S. sales thru '12	CA reg. share of U.S. sales thru '12
LEAF	BEV	29%	27%	40%
Chevy Volt	PHEV	33%	44%	28%
smart fortwo ed	BEV	2%	1%	82%
i	BEV	1%	1%	22%
Focus Electric	BEV	2%	1%	65%
Active E	BEV	2%	1%	47%
Prius Plug-In	PHEV	26%	18%	53%
Model S 85kWh	BEV	5%	3%	52%
Fit EV	BEV	0%	0%	90%
RAV4EV	BEV	0%	0%	63%
C-Max Energi	PHEV	1%	3%	10%
BEVs		41%	35%	43%
PHEVs		59%	65%	34%
PEVs		100%	100%	37%

Based on revenues from base MSRP multiplied by the number of vehicles sold, California PEVs are a \$1 billion market, and the Volt is a \$0.3 billion product.