

GET CONNECTED

ELECTRIC VEHICLE QUARTERLY REPORT



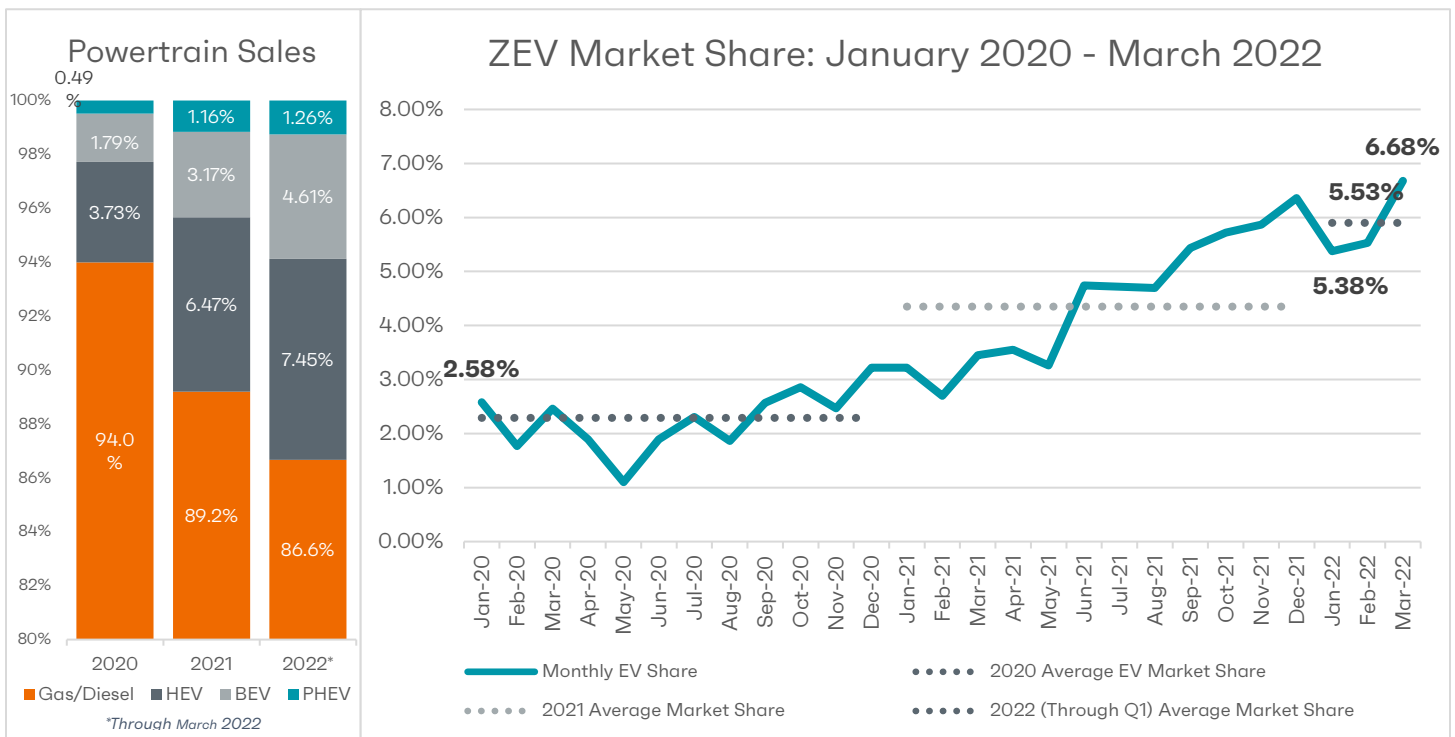
FIRST QUARTER, 2022

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Electric Vehicle Sales Overview (2022)

For the months of January – March 2022, electric vehicles (EVs, including battery, plug-in hybrid, and fuel cell electric vehicles; BEV, PHEV, and FCEV) represented 5.9 percent of overall light-duty vehicle sales, a 2.7 percentage point (pp) increase over the same period in 2021, and a 0.09 pp decrease from the fourth quarter of 2021¹. More than 195,147 EVs were sold in the first quarter of 2022 in the United States. The total volume of all light-duty sales for the quarter increased nearly 6 percent from the fourth quarter of 2021 while the volume of EV sales increased 4.2 percent. Year-over-year (YoY), the first quarter had 68,634 more EV unit sales than the same period in 2021 (+54 percent). For comparison, internal combustion engine (ICE) vehicle sales decreased by 0.03 pp during the first quarter of 2022 compared to the fourth quarter of 2021 and decreased 4.5 percent compared against the same quarter a year ago².



¹ See, the “Get Connected: Electric Vehicle Report” for the fourth quarter.

² Hybrid vehicles comprised the remainder of the gains in vehicle share.

ELECTRIC VEHICLE SALES BY SEGMENT

While passenger cars once dominated the EV market, new models are being introduced, especially in the utility vehicle³ (UV) segment. As a result, other segments are starting to make gains, and in the first quarter of 2022, light truck – UVs, minivans, and pickups – sales comprised more than 62 percent of the EV market.

Monthly sales of BEV and PHEV UVs have grown from less than 17 percent of EVs at the start of 2020 to an average of 59 percent in the first quarter of 2022 (averaging 55 percent of EV sales for all of 2021).

Electric pickup trucks are a relatively new entry to the market, making their commercial debut in September 2021 – with more models and deliveries expected soon.

Electric Vehicle Transaction Prices

The cost of the average EV in the first quarter of 2022 was about \$65,000 while the average cost of all new light duty vehicles in that time period was about \$46,000. Year-over-year, EV prices rose more than \$7,000 from the first quarter of 2021 while the average cost of all new light vehicles rose just over \$5,000.⁴

EV MODEL AVAILABILITY

79 Vehicle Models Sold in Q1 2022:

36 Battery Electric Vehicles

- 15 Cars
- 16 Utility Vehicles
- 3 Pickups
- 2 Vans

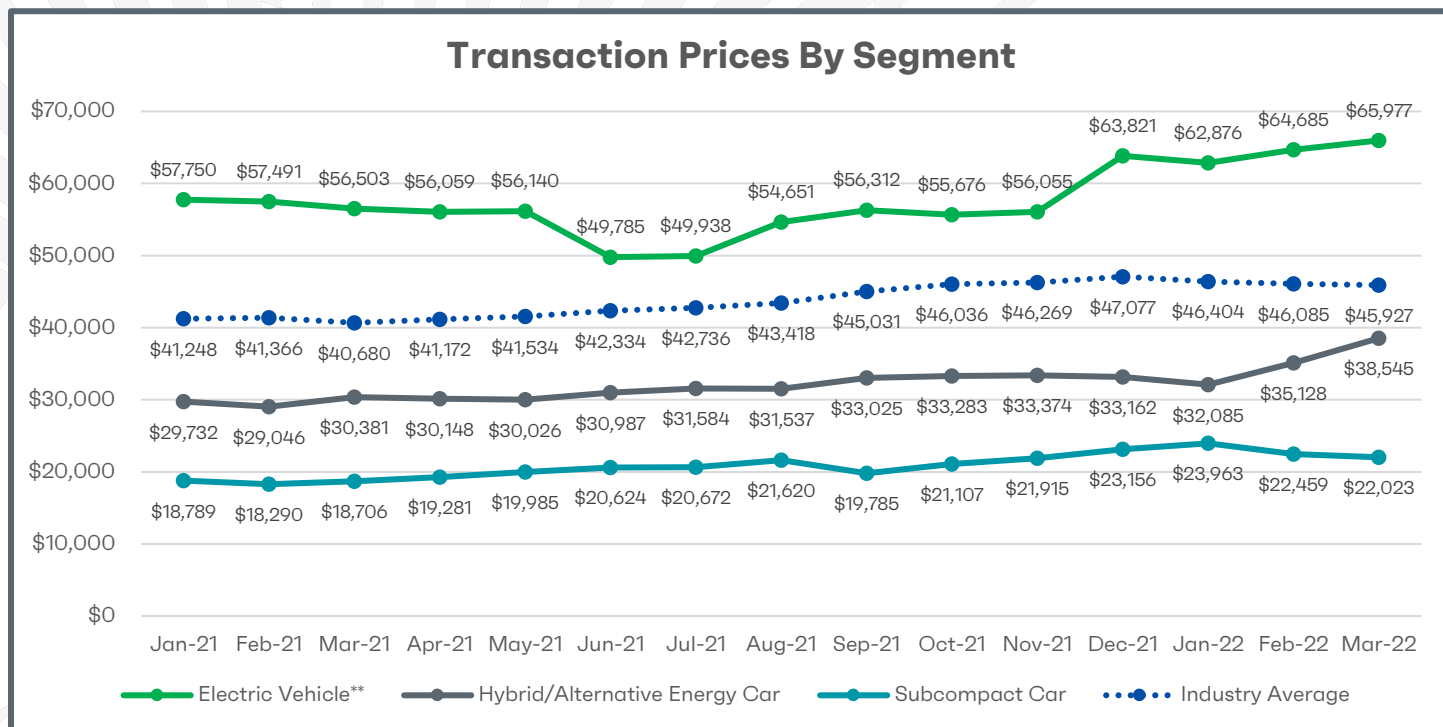
40 Plug-in Hybrid Vehicles

- 18 Cars
- 21 Utility Vehicles
- 1 Van

3 Fuel Cell Electric Vehicles

- 2 Cars
- 1 Utility Vehicle

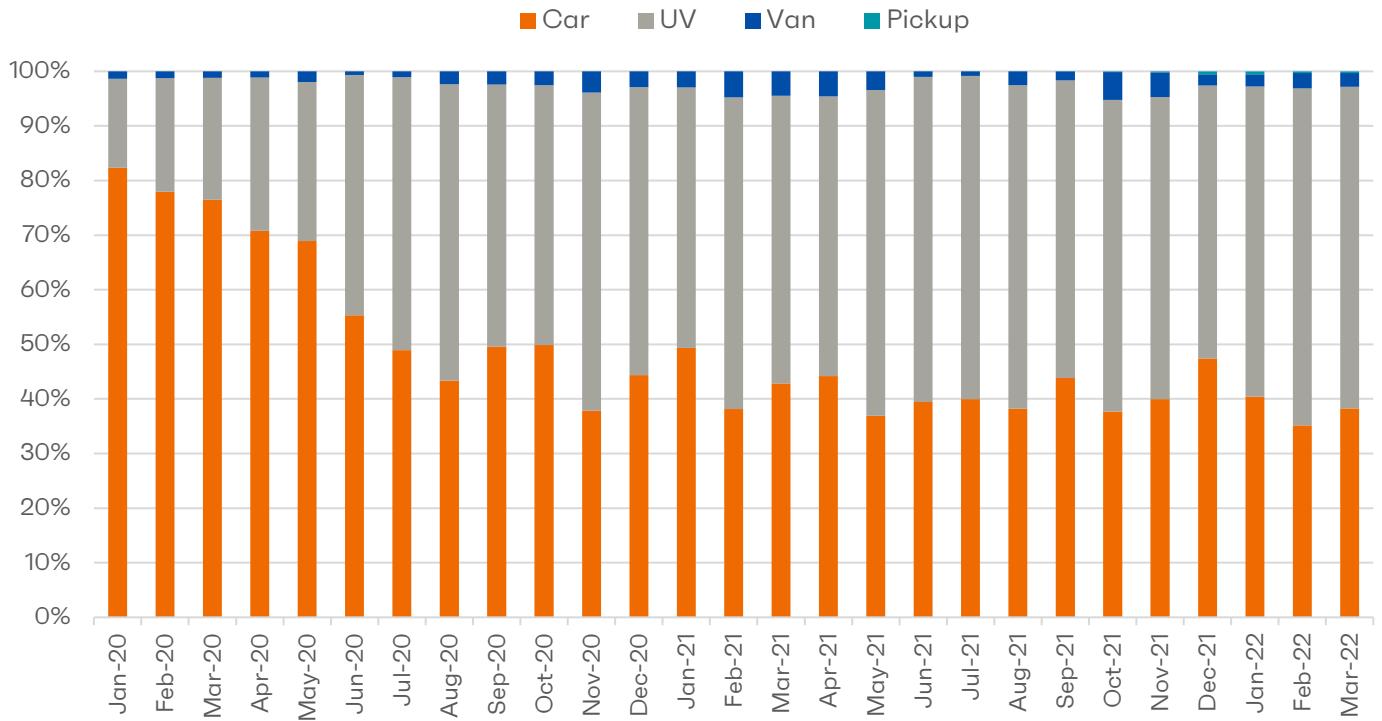
See more information about [**EV CHOICE HERE**](#)



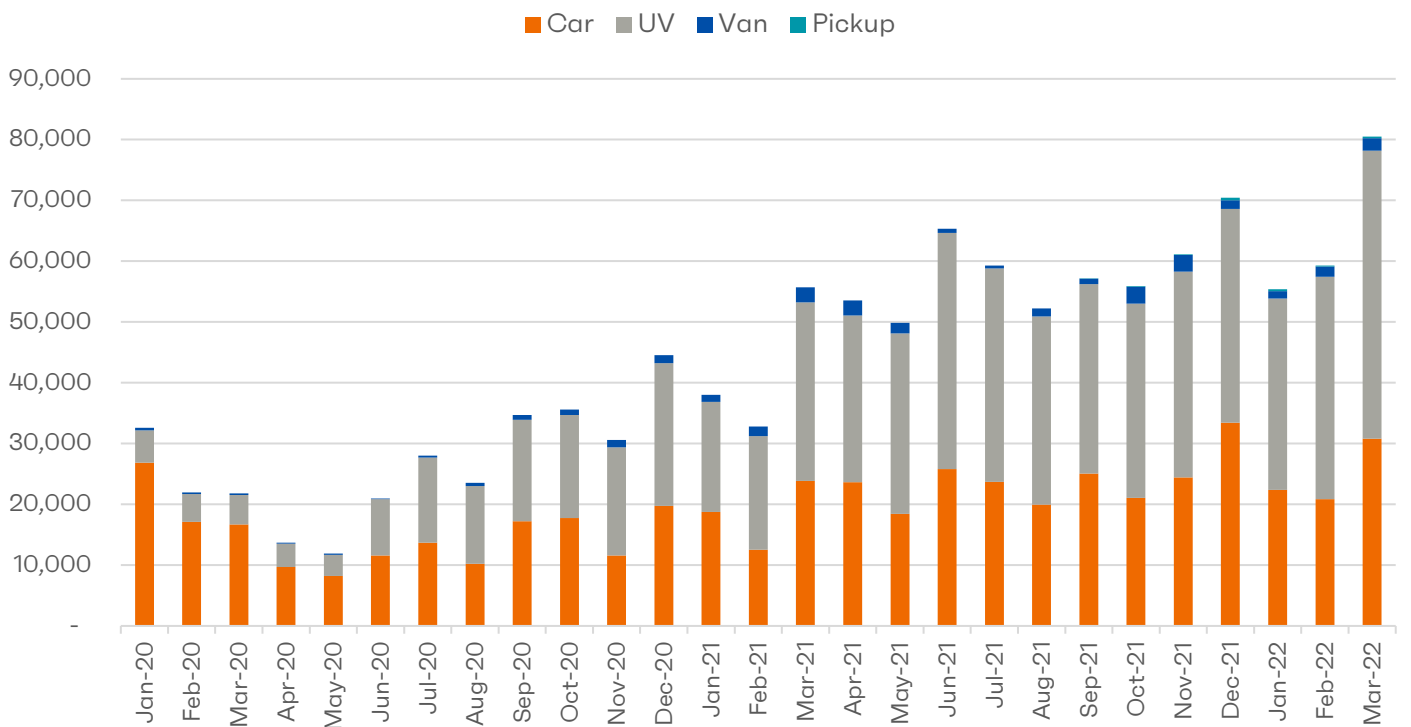
³ Utility vehicles include sport utility vehicles and crossover utility vehicles, combined

⁴ Average transaction prices from Kelley Blue Book, monthly press releases

EV Share By Segment



EV Sales By Segment



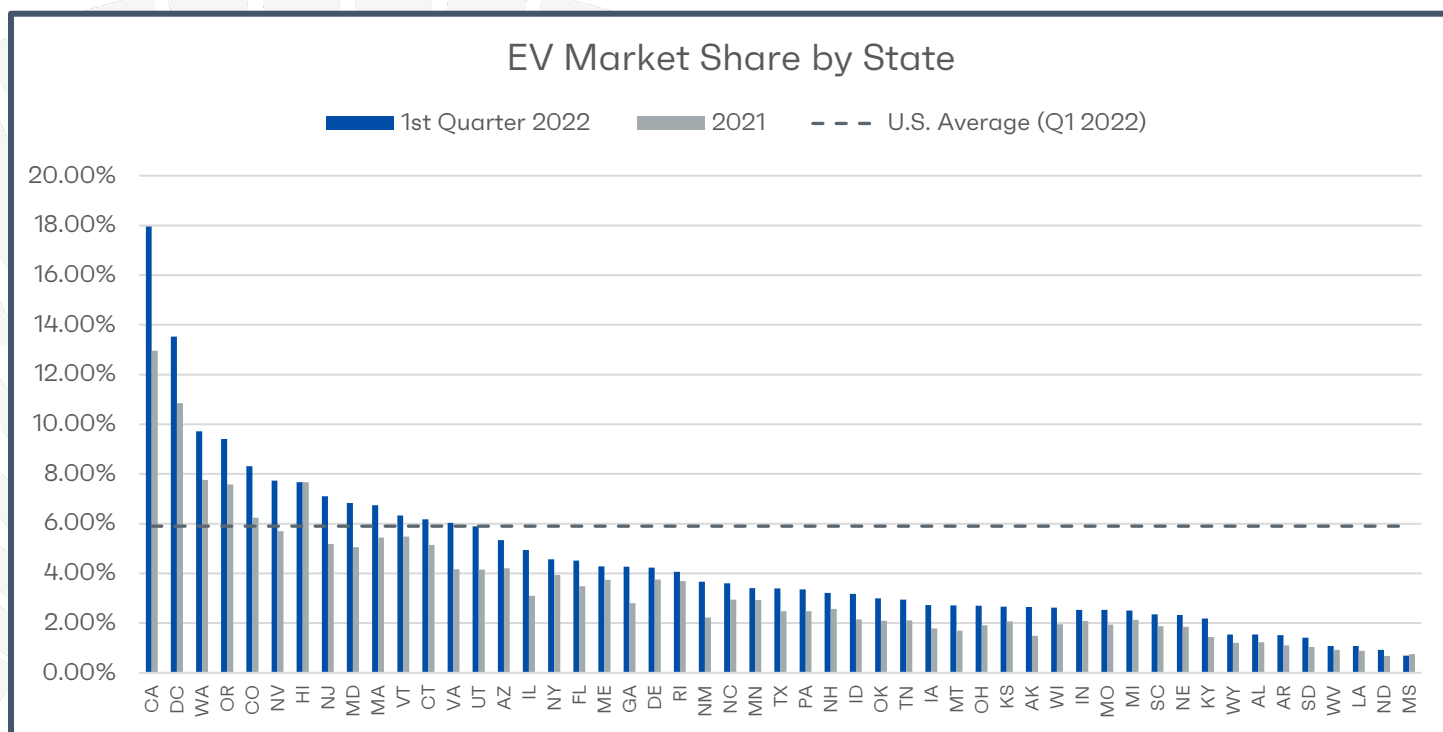
Source: Figures compiled by Alliance for Automotive Innovation with new registrations for retail and fleet data provided by S&P Global Mobility covering January 1, 2020 – March 31, 2022.

ELECTRIC VEHICLE SALES BY STATE

For the First Quarter 2022:

California continues to lead the nation in EV sales, with BEVs, PHEVs and FCEVs making up nearly 18 percent of new light-duty vehicle registrations in the first quarter of 2022. There are currently 13 additional states⁵ and the District of Columbia with new vehicle EV registrations above 5 percent, three states fewer than in the fourth quarter. Nationally, EV new vehicle registrations in January 2022 – March 2022 were 5.9 percent, a 0.09 pp decrease from the fourth quarter of 2021.

The market share of new EV vehicles registered increased in all states, year-over-year, in the first quarter of 2022. Eighteen states witnessed increased market share of EVs by 2 pp or more. Making the largest increases were California (7.2 pp), the District of Columbia (4.7 pp), Nevada (3.9 pp), Washington (3.7 pp) and Oregon (3.7 pp). The national average for EV sales in the first quarter increased by 2.7 pp YoY (from 3.2 percent to 5.9 percent EV sales).



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[SEE ADDITIONAL HISTORIC DATA ON EV SALES HERE](#)

⁵ States with more than a 5 percent market share of EVs: California, Washington, Oregon, Colorado, Nevada, Hawaii, New Jersey, Maryland, Massachusetts, Vermont, Connecticut, Virginia, Utah, Arizona, and the District of Columbia.

⁶ Figures compiled by Alliance for Automotive Innovation with new registrations for retail and fleet data provided by S&P Global Mobility covering January 1 – March 31, 2021, and January 1 – March 31, 2022



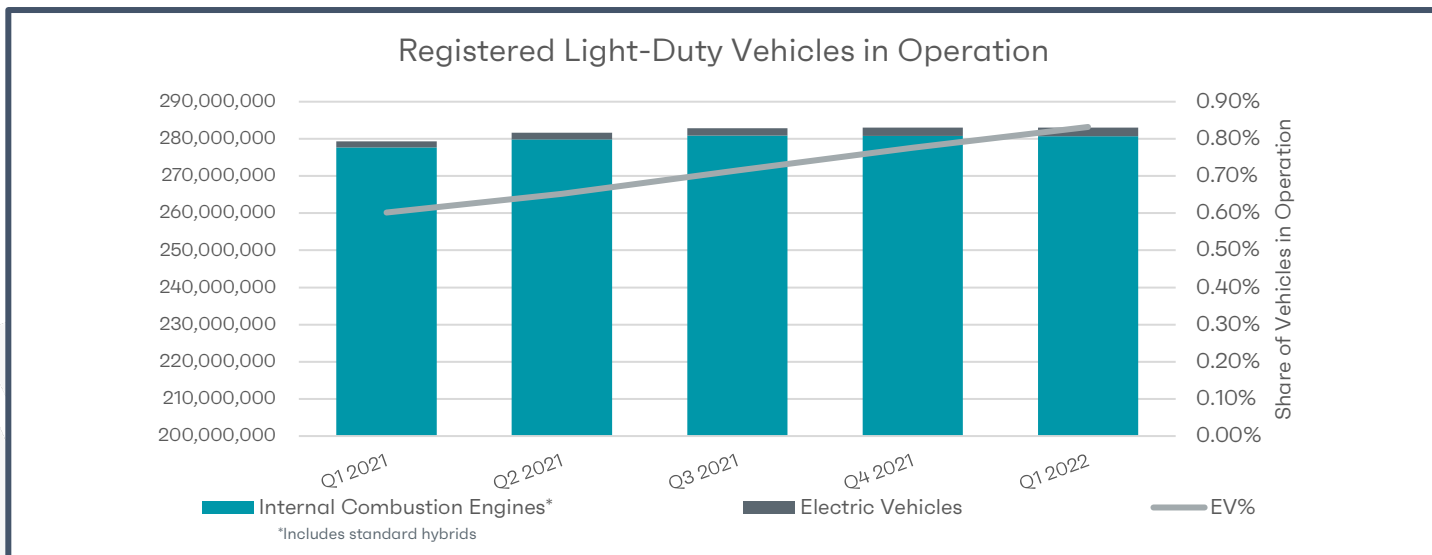
First Quarter 2022, New Light-Duty Vehicle Registrations By Powertrain					Change In Market Share (2022 Q1 vs 2021 Q1), New Light-Duty Vehicle Registrations Powertrain				
State	Advanced Powertrain Market Share				Advanced Powertrain Market Share (Percentage Point Change)				
	PHEV	BEV	FCEV	ZEV	PHEV	BEV	FCEV	ZEV	
AK	0.69%	2.0%	0.0%	2.65%	0.41	1.03	0.00	1.44	
AL	0.39%	1.2%	0.0%	1.54%	0.16	0.59	0.00	0.75	
AR	0.46%	1.1%	0.0%	1.52%	0.24	0.56	0.00	0.79	
AZ	0.98%	4.4%	0.0%	5.34%	0.51	1.83	0.00	2.33	
CA*	2.48%	15.2%	0.3%	17.96%	-0.18	7.39	0.03	7.23	
CO*	1.99%	6.3%	0.0%	8.31%	0.99	2.42	0.00	3.41	
CT*	2.06%	4.1%	0.0%	6.17%	0.87	1.88	0.00	2.75	
DC	3.82%	9.7%	0.0%	13.53%	1.34	3.40	0.00	4.73	
DE	1.26%	3.0%	0.0%	4.23%	0.56	1.11	0.00	1.67	
FL	0.77%	3.7%	0.0%	4.51%	0.40	1.50	0.00	1.90	
GA	0.69%	3.6%	0.0%	4.27%	0.31	1.94	0.00	2.25	
HI	1.73%	5.9%	0.0%	7.67%	0.73	0.50	0.00	1.22	
IA	0.83%	1.9%	0.0%	2.73%	0.44	1.25	0.00	1.68	
ID	0.85%	2.3%	0.0%	3.18%	0.43	1.32	0.00	1.75	
IL	1.14%	3.8%	0.0%	4.95%	0.61	2.19	0.00	2.80	
IN	0.83%	1.7%	0.0%	2.53%	0.45	0.62	0.00	1.06	
KS	0.74%	1.9%	0.0%	2.66%	0.37	0.83	0.00	1.19	
KY	0.76%	1.4%	0.0%	2.18%	0.51	0.76	0.00	1.27	
LA	0.36%	0.7%	0.0%	1.07%	0.20	0.30	0.00	0.51	
MA*	2.55%	4.2%	0.0%	6.74%	1.34	1.58	0.00	2.93	
MD*	1.68%	5.1%	0.0%	6.83%	0.70	2.70	0.00	3.40	
ME*	2.28%	2.0%	0.0%	4.28%	0.86	0.97	0.00	1.82	
MI	1.06%	1.5%	0.0%	2.51%	0.59	0.43	0.00	1.02	
MN*	1.03%	2.4%	0.0%	3.41%	0.51	0.89	0.00	1.40	
MO	0.88%	1.6%	0.0%	2.53%	0.61	0.62	0.00	1.23	
MS	0.30%	0.4%	0.0%	0.69%	0.16	0.14	0.00	0.30	
MT	0.82%	1.9%	0.0%	2.71%	0.59	1.27	0.00	1.86	
NC	0.82%	2.8%	0.0%	3.60%	0.37	1.10	0.00	1.47	
ND	0.36%	0.6%	0.0%	0.93%	0.26	0.33	0.00	0.59	
NE	0.87%	1.5%	0.0%	2.33%	0.51	0.53	0.00	1.04	
NH	1.14%	2.1%	0.0%	3.22%	0.51	1.06	0.00	1.57	
NJ*	1.66%	5.4%	0.0%	7.10%	0.92	2.15	0.00	3.07	
NM	0.83%	2.8%	0.0%	3.66%	0.38	1.65	0.00	2.02	
NV*	1.08%	6.7%	0.0%	7.74%	0.53	3.36	0.00	3.89	
NY*	1.74%	2.8%	0.0%	4.56%	0.68	1.15	0.00	1.83	
OH	0.74%	2.0%	0.0%	2.70%	0.43	1.03	0.00	1.46	
OK	1.63%	1.4%	0.0%	2.99%	1.57	1.20	0.00	2.78	
OR*	2.92%	6.5%	0.0%	9.40%	1.33	2.34	0.00	3.67	
PA	0.89%	2.5%	0.0%	3.36%	0.45	1.20	0.00	1.65	
RI*	1.82%	2.2%	0.0%	4.07%	1.03	0.60	0.00	1.63	
SC	0.69%	1.7%	0.0%	2.35%	0.34	0.69	0.00	1.03	
SD	0.43%	1.0%	0.0%	1.42%	0.22	0.55	0.00	0.77	
TN	0.68%	2.3%	0.0%	2.95%	0.41	1.23	0.00	1.64	
TX	0.55%	2.8%	0.0%	3.40%	0.27	1.46	0.00	1.74	
UT	1.23%	4.7%	0.0%	5.90%	0.68	2.36	0.00	3.03	
VA*	1.50%	4.5%	0.0%	6.04%	0.85	2.40	0.00	3.24	
VT*	2.85%	3.5%	0.0%	6.34%	1.29	1.30	0.00	2.59	
WA*	1.57%	8.1%	0.0%	9.72%	0.56	3.14	0.00	3.70	
WI	0.76%	1.9%	0.0%	2.62%	0.39	0.84	0.00	1.22	
WV	0.38%	0.7%	0.0%	1.08%	0.20	0.29	0.00	0.49	
WY	0.43%	1.1%	0.0%	1.54%	0.12	0.60	0.00	0.72	
U.S.	1.26%	4.6%	0.0%	5.90%	0.50	2.24	0.01	2.74	

*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 S&P Global Mobility covering January 1 – March 31, 2021, and January 1 – March 31, 2022.

REGISTRATIONS AND INFRASTRUCTURE

Share of Registered EVs In U.S. Fleet Continues to Increase Incrementally. As sales of EVs increase, so does the total number of EVs operating on U.S. roads. While there are more than 283 million light-duty vehicles in operation in the United States, electric vehicles continue to represent less than one percent of all vehicles in the country (just over 2.35 million EVs). At the end of the first quarter of 2022, registered EVs constituted 0.83 percent of the U.S. fleet, an increase of 0.05 pp since the end of 2021 and an increase of 0.23 pp since the end of the first quarter in 2021.⁷

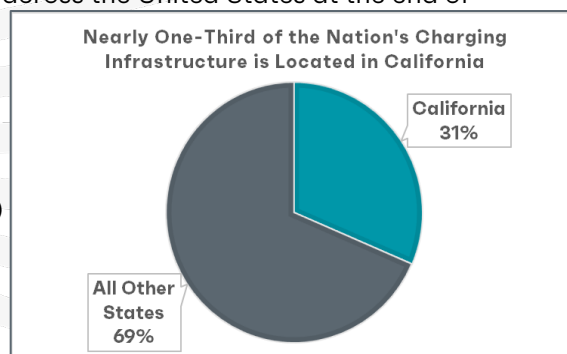


U.S. PUBLIC CHARGING INFRASTRUCTURE

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 workplace and public charging and refueling stations help to support customers that purchase EVs. Workplace and public charging infrastructure not only eases perceived "range anxiety" concerns but also increases consumer awareness of the technology. The bipartisan Infrastructure Investment and Jobs Act that was signed into law in November 2021, includes \$5 billion in funding for states to establish a nationwide EV charging network and \$2.5 billion in competitive grants to deploy publicly available EV charging, hydrogen fueling, propane fueling, and natural gas fueling stations through 2026. Here is a snapshot of publicly available EV charging and refueling infrastructure available across the United States at the end of March 2022:

- Level 2:** 40,722 Locations, 90,821 EVSE Ports (+17% since 1/1/21)
- DC Fast:** 5,954 Locations, 22,924 EVSE Ports (+31% since 1/1/21)
- Hydrogen Refueling:** 48 Stations (47 of 48 are in California)
- U.S. Total:** 46,724 Locations, 113,793 EVSE Ports (+20% since 1/1/21)

[See Recommended Attributes for EV Charging Stations](#)



California has 39% of all registered EVs

Charging information from U.S. Department of Energy Alternative Fuels Data Center, as captured on 1/1/2021 and 3/31/2022

⁷ Registered vehicles in operation compiled by Alliance for Automotive Innovation with data provided by S&P Global Mobility covering January 1, 2021 – March 31, 2022



Public Charging Outlets And Registered EVs (as of 3/31/2022)

	EV Level 2	EV DC Fast	H2** Fueling	Total	Percent EVs of Total VIO***	Share of Registered EVs****	EVs Per Charger	Additional Chargers Needed to Support 25% EV VIO*****	EVs Per 10K Residents
AK	75	17	-	92	0.33%	0.08%	20.21	20,230	25.21
AL	384	142	-	526	0.16%	0.35%	15.80	180,215	17.01
AR	390	67	-	457	0.15%	0.18%	9.05	98,756	13.73
AZ	1,790	471	-	2,261	0.87%	2.53%	26.30	243,097	82.92
CA*	27,979	7,010	47	35,036	2.91%	38.85%	26.11	1,089,053	231.30
CO*	2,855	597	-	3,452	1.05%	2.40%	16.39	188,954	99.31
CT*	905	315	-	1,220	0.80%	1.01%	19.41	105,085	66.30
DC	642	39	-	681	1.88%	0.27%	9.48	11,614	91.93
DE	210	98	-	308	0.60%	0.23%	17.79	32,145	56.65
FL	4,661	1,295	-	5,956	0.74%	5.80%	22.94	649,741	64.14
GA	2,905	614	-	3,519	0.53%	2.11%	14.15	330,372	47.33
HI	673	78	1	752	1.65%	0.83%	25.93	41,565	137.27
IA	367	205	-	572	0.25%	0.33%	13.65	112,711	24.73
ID	182	79	-	261	0.34%	0.28%	25.47	69,931	37.89
IL	1,833	542	-	2,375	0.57%	2.45%	24.33	360,574	45.36
IN	596	284	-	880	0.30%	0.79%	21.01	217,096	27.63
KS	824	114	-	938	0.29%	0.35%	8.82	101,940	28.41
KY	411	105	-	516	0.19%	0.33%	14.93	145,448	17.25
LA	265	81	-	346	0.14%	0.23%	15.75	136,163	11.70
MA*	4,160	472	-	4,632	1.01%	2.33%	11.86	189,662	79.60
MD*	2,422	607	-	3,029	0.91%	1.97%	15.32	178,716	76.78
ME*	492	147	-	639	0.58%	0.33%	12.00	46,691	57.28
MI	1,302	421	-	1,723	0.41%	1.47%	20.13	301,206	34.70
MN*	995	232	-	1,227	0.47%	1.05%	20.06	184,839	43.87
MO	1,827	255	-	2,082	0.32%	0.76%	8.58	198,117	29.17
MS	217	73	-	290	0.08%	0.10%	8.38	104,115	8.14
MT	109	107	-	216	0.20%	0.12%	13.61	52,745	27.68
NC	1,887	521	-	2,408	0.45%	1.81%	17.71	336,327	41.07
ND	93	58	-	151	0.10%	0.03%	5.14	28,101	10.21
NE	288	83	-	371	0.24%	0.21%	13.33	74,172	25.63
NH	228	120	-	348	0.59%	0.33%	22.56	47,486	57.89
NJ*	1,118	582	-	1,700	0.97%	2.95%	40.90	253,744	78.06
NM	296	140	-	436	0.37%	0.31%	16.84	70,024	35.05
NV*	1,082	338	-	1,420	1.06%	1.12%	18.51	87,259	86.62
NY*	5,918	891	-	6,809	0.88%	4.33%	14.97	405,813	52.17
OH	1,758	365	-	2,123	0.34%	1.58%	17.48	382,439	31.75
OK	341	653	-	994	0.35%	0.66%	15.66	159,298	39.48
OR*	1,640	448	-	2,088	1.31%	2.09%	23.58	131,928	117.51
PA	2,026	543	-	2,569	0.44%	2.09%	19.17	394,387	38.45
RI*	504	45	-	549	0.60%	0.21%	9.13	29,538	47.43
SC	635	185	-	820	0.24%	0.54%	15.55	186,178	25.08
SD	94	69	-	163	0.14%	0.06%	8.78	35,358	16.22
TN	1,094	231	-	1,325	0.31%	0.88%	15.57	235,928	30.47
TX	4,093	967	-	5,060	0.49%	4.94%	23.00	845,930	40.55
UT	1,567	242	-	1,809	0.86%	1.05%	13.72	100,783	78.54
VA*	2,019	768	-	2,787	0.64%	2.05%	17.35	265,945	56.75
VT*	708	88	-	796	1.22%	0.29%	8.54	19,095	108.51
WA*	2,963	768	-	3,731	1.35%	4.03%	25.44	247,614	125.97
WI	662	197	-	859	0.33%	0.75%	20.58	189,789	30.41
WV	200	78	-	278	0.14%	0.09%	7.90	54,948	12.16
WY	92	75	-	167	0.15%	0.04%	5.99	23,109	17.31
U.S.	90,777	22,922	49	113,748	0.83%	100.00%	20.70	9,995,970	71.98

REGISTRATIONS

EV registrations as a share of all registered light-duty vehicles are 0.83 percent (as of March 31, 2022.) There are over 283 million registered light-duty vehicles in the U.S.

At the end of the first quarter, California accounted for nearly 39 percent of all registered light-duty EVs in the U.S.

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

1. CA* (914,942, 39%)
2. FL (136,614, 5.8%)
3. TX (116,396, 4.9%)
4. NY* (101,944, 4.3%)
5. WA* (94,925, 4.0%)
6. NJ* (69,537, 2.9%)
7. AZ (59,467, 2.5%)
8. IL (57,792, 2.5%)
9. CO* (56,564, 2.4%)
10. MA* (54,943, 2.3%)

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

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

Read more about automakers plans for an

ELECTRIC FUTURE
HERE

*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 S&P Global Mobility as of March 31, 2022; Charging information from U.S. Department of Energy Alternative Fuels Data Center, as of 3/31/2022.