Summary of Bay Area Transportation Electrification Progress

MTC Planning Committee and

ABAG Administrative Committee

July 11, 2025

Electric Vehicles: Ambitious Targets

State Targets

100%

Zero-Emission Vehicles (ZEVs) in new sales of passenger vehicles

Advanced Clean Cars II (ACCII)

2035

100%

Zero-Emission Bus fleets

Innovative Clean Transit (ICT)

2040

SB 375 Greenhouse Gas Estimates *(not yet approved by CARB)*

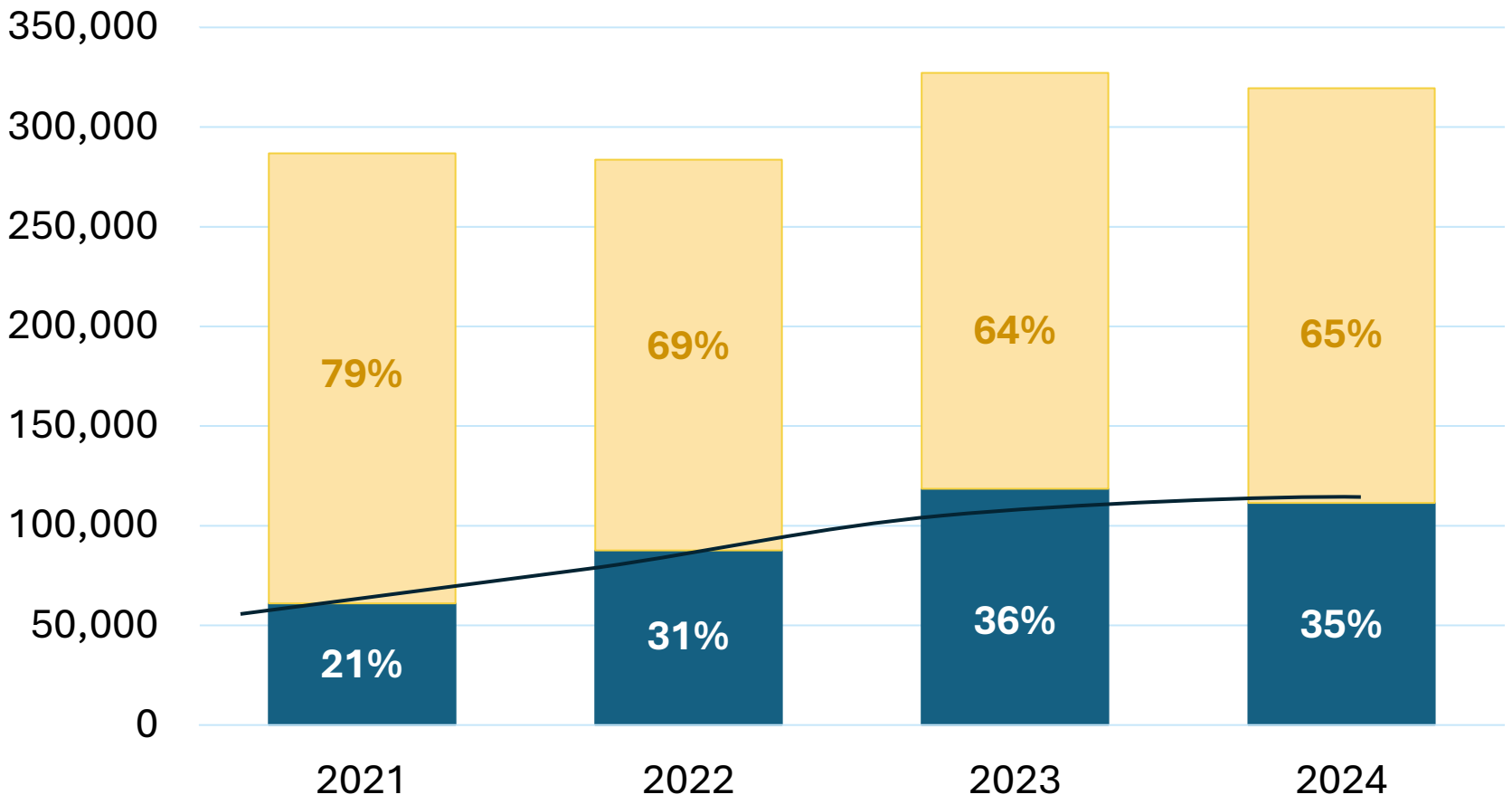
Plan Bay Area 2050+ (without Climate Strategies)

With Climate Strategies

-19% target

-21% achieved

Bay Area New Vehicle Sales Trends: Electric Future



- **Electric vehicles (EVs)** have been a growing proportion of new vehicle purchases in the Bay Area, compared to **gasoline vehicles**.

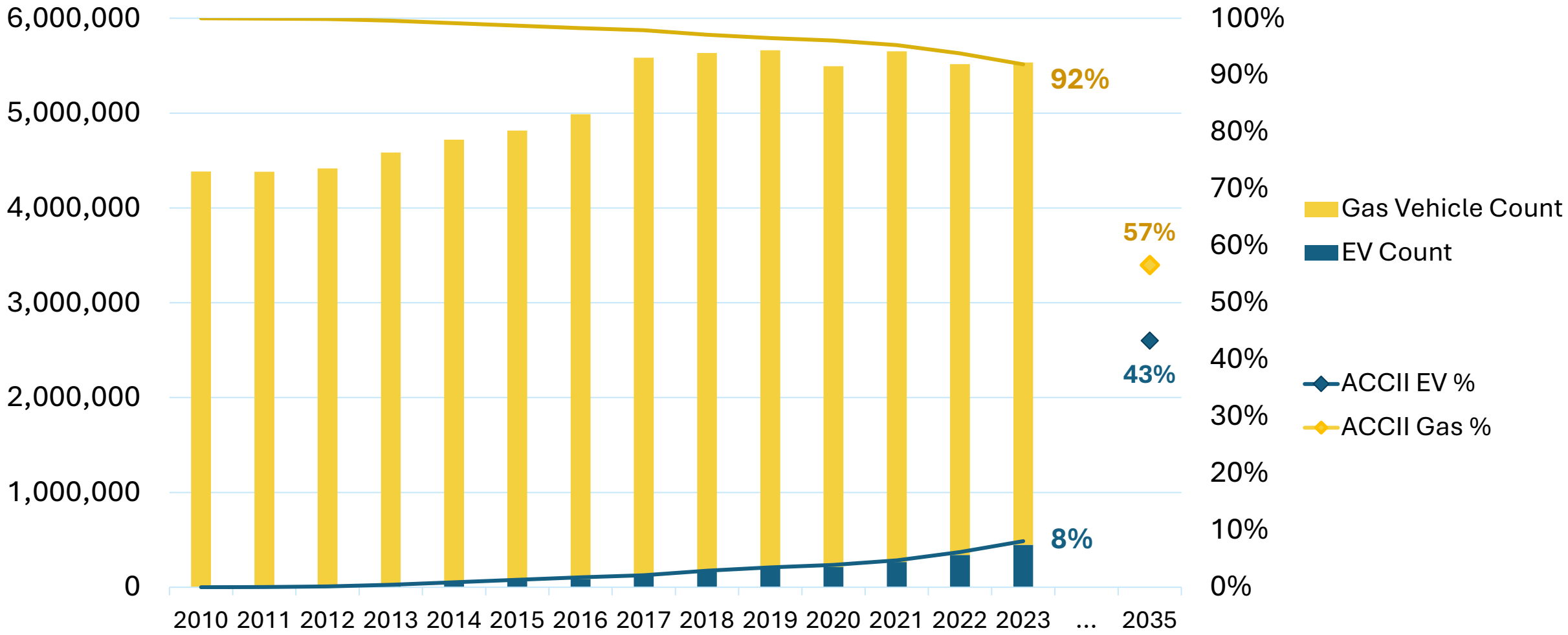
Non-ZEV Sales

ZEV Sales

New Light-Duty Vehicle Sales in the Bay Area: Electric Vehicles vs. Gasoline Vehicles

Source: California Energy Commission Zero Emission Vehicle and Infrastructure Statistics Dashboard, Total Light-Duty Sales, June 30, 2024

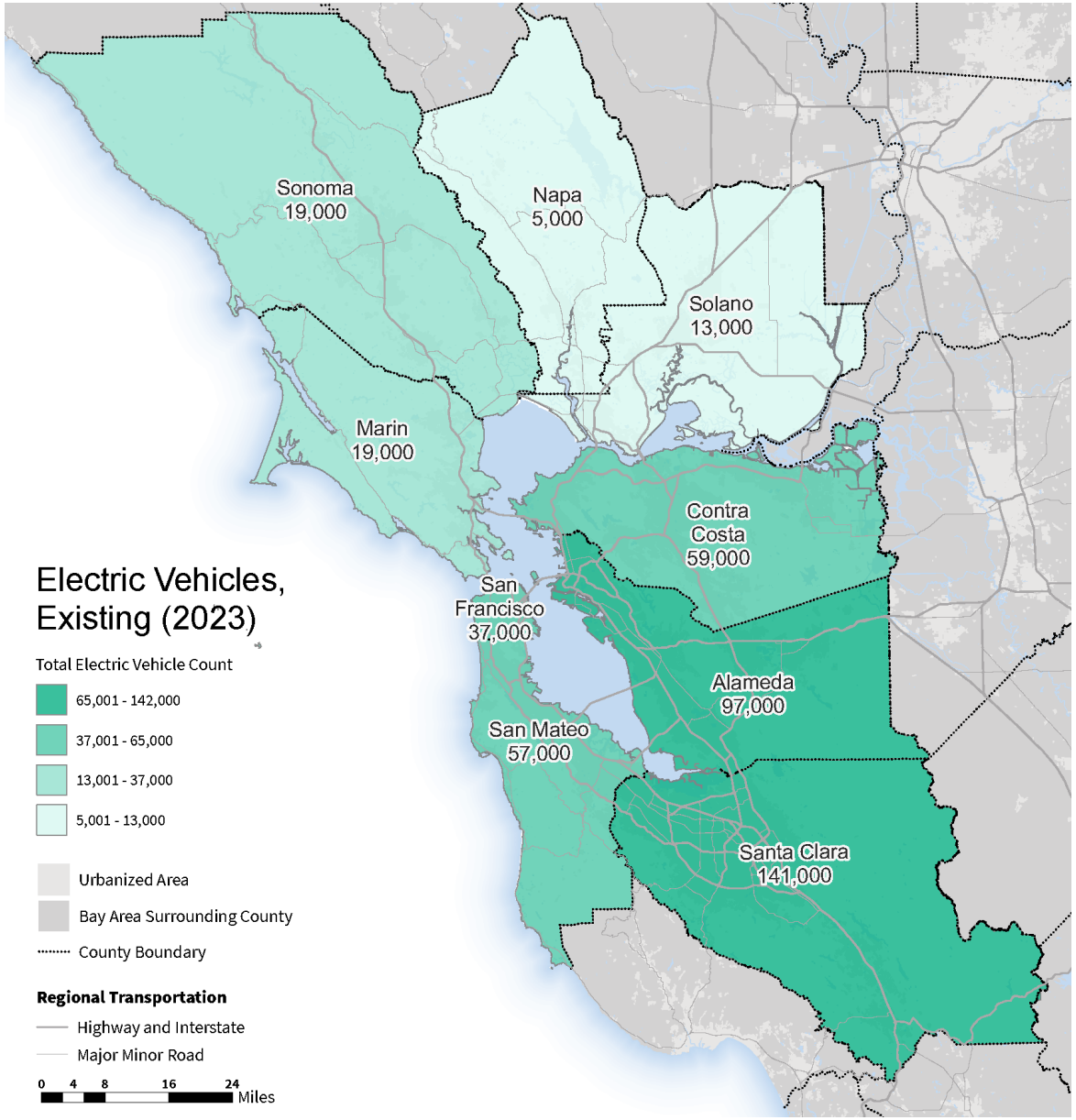
Bay Area EV Adoption: Strong, but Far to Go



Total Vehicle Population in the Bay Area: Electric Vehicles vs. **Gasoline Vehicles**

Source: California Energy Commission Zero Emission Vehicle and Infrastructure Statistics Dashboard, Light-Duty Vehicle Population in California, December 31, 2023. California Air Resources Board, EMFAC2025.

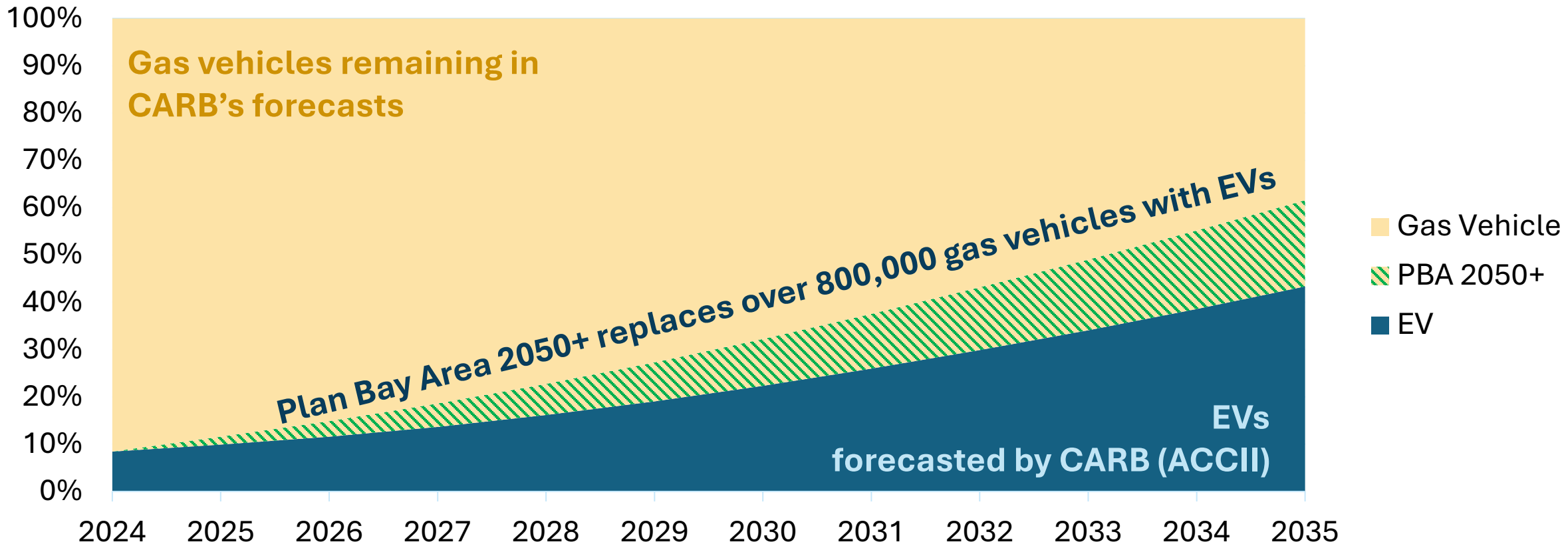
EVs Across the Region: Adoption Varies Widely



County	EV Population	% EVs	Median HH Income
Alameda	97,000	9%	$110,000
Contra Costa	59,000	7%	$111,000
Marin	19,000	9%	$118,000
Napa	5,000	5%	$97,000
San Francisco	37,000	9%	$122,000
San Mateo	57,000	10%	$132,000
Santa Clara	141,000	10%	$142,000
Solano	13,000	4%	$88,000
Sonoma	19,000	5%	$94,000
Region	***448,000***	***8%***	***$113,000***

Source: CEC (2024), Zero Emission Vehicle and Infrastructure Statistics; Data last updated Dec 31, 2023. MTC Vital Signs.

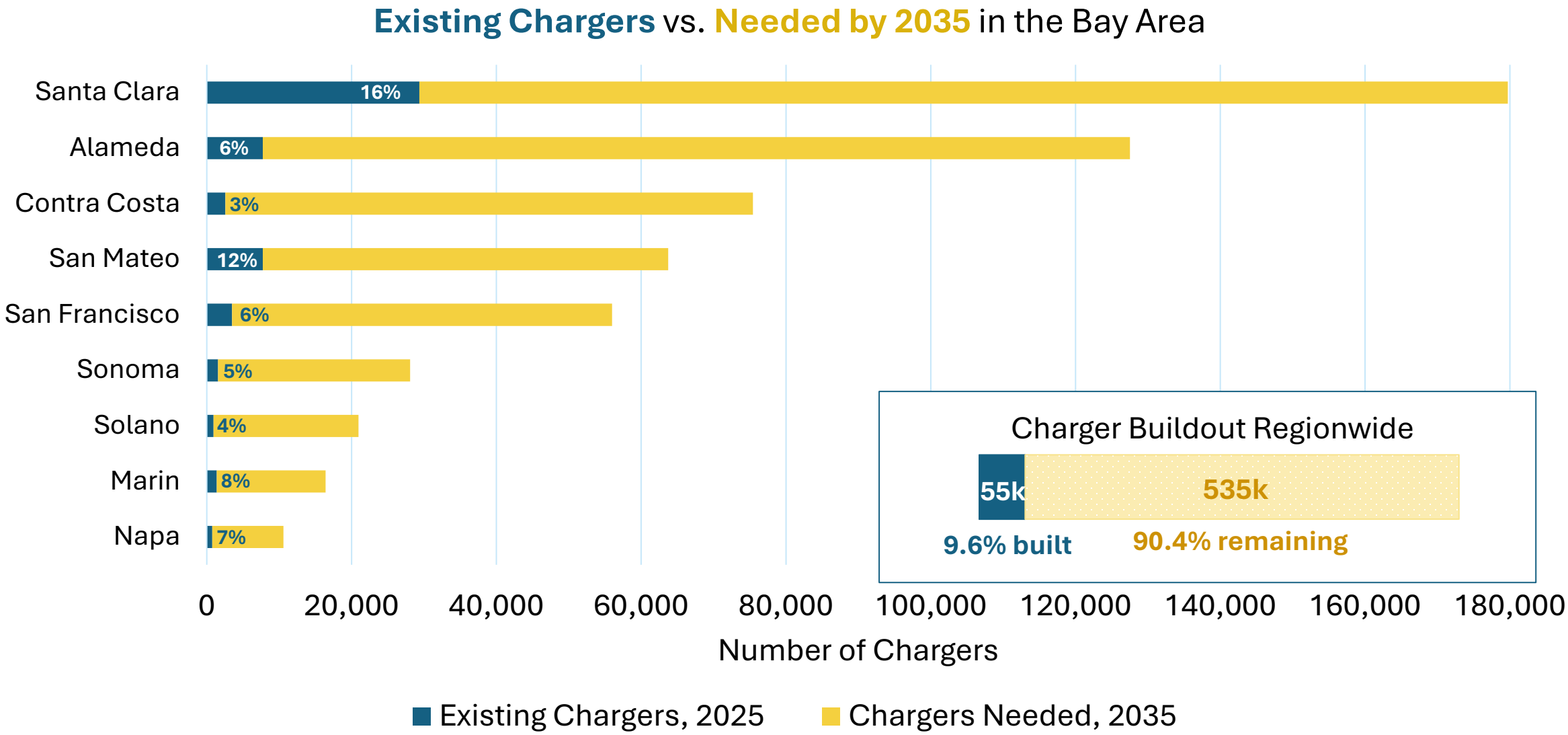
Plan Bay Area: All Hands Needed to Accelerate EVs



- Plan Bay Area 2050+ Environment Strategy 8 (EN8) includes a **Vehicle Buyback & EV Incentive** initiative to increase **EV uptake through $7.7 billion** in incentive funding while **retiring over 800,000 gas vehicles** ahead of the State's schedule.
- Strategy EN8 also reduces vehicle trips with **$100 million in consumer E-Bike Incentives**.

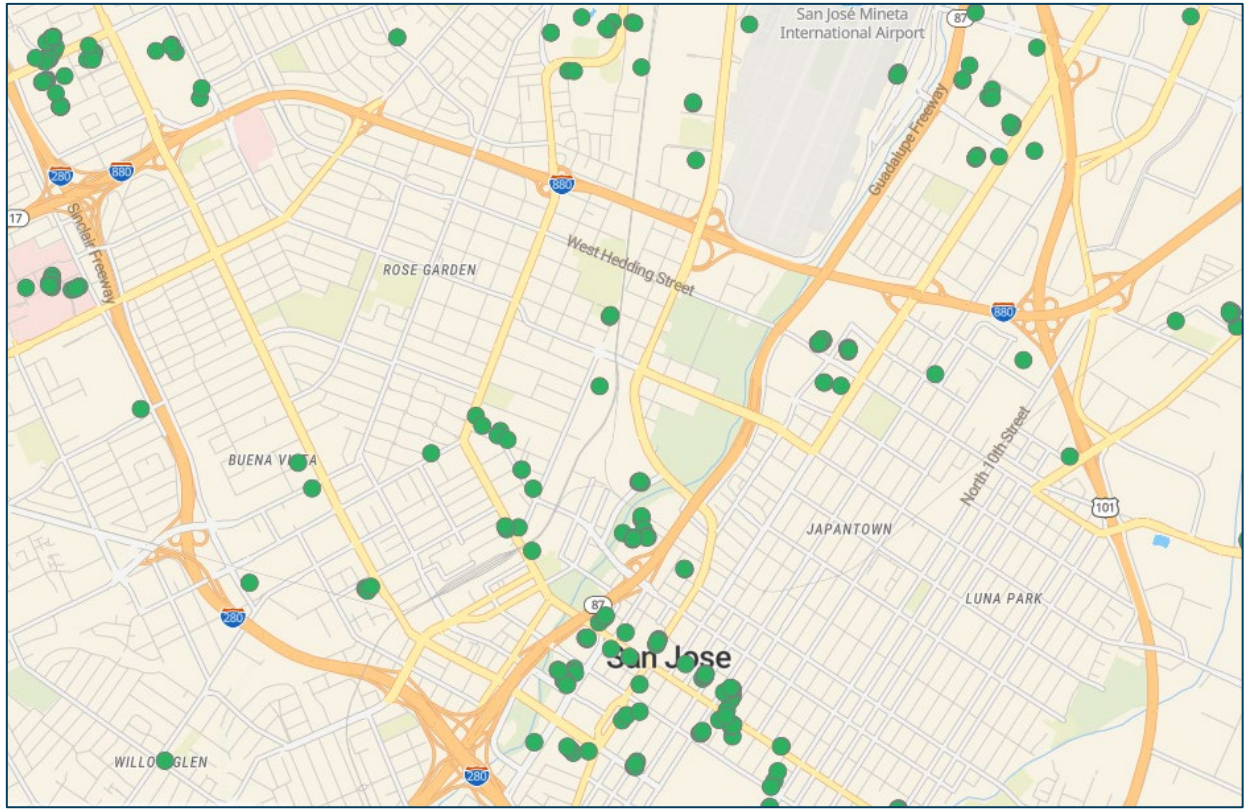
Source: CARB EMFAC2025. MTC Plan Bay Area 2050+.

Bay Area Charging Need: Far to Go

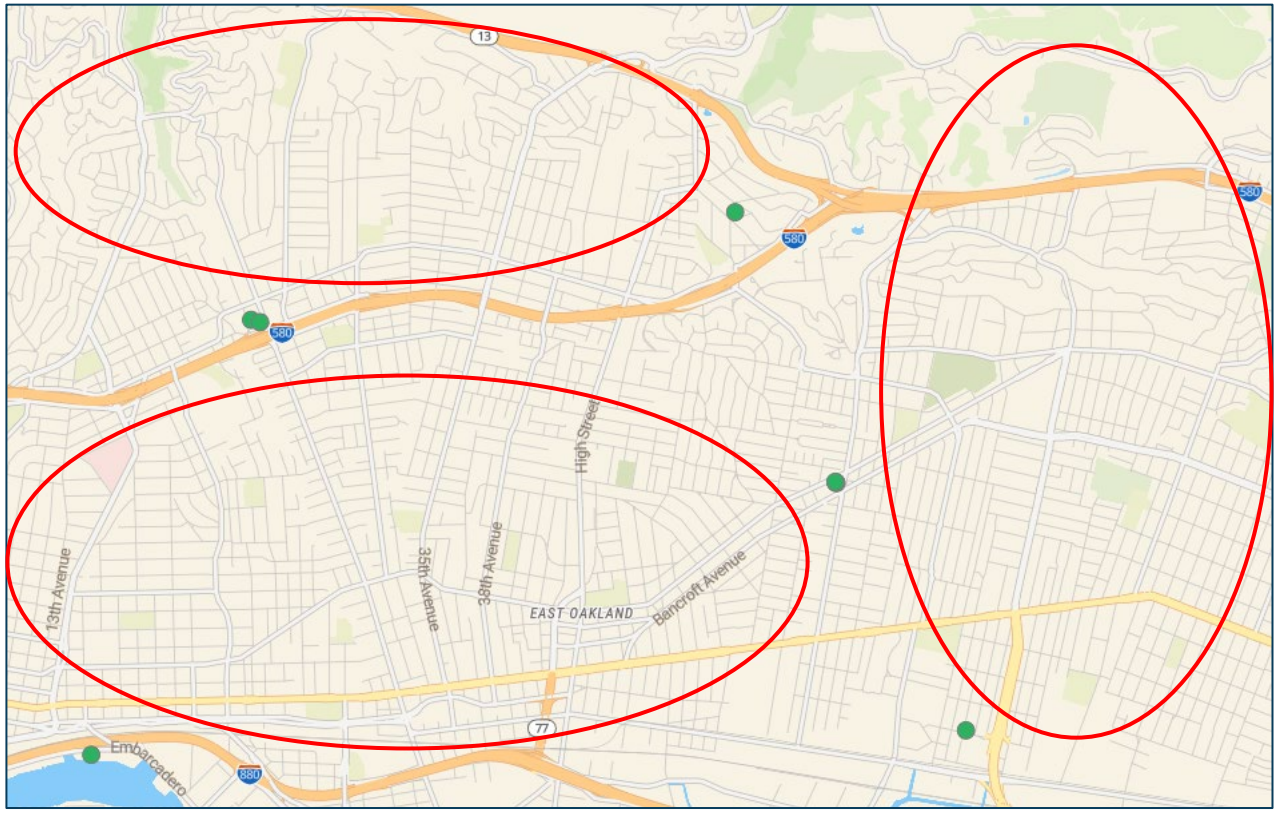


Source: California Energy Commission Zero Emission Vehicle and Infrastructure Statistics Dashboard, Electric Vehicle Chargers in California, August 26, 2024.

Charging Access: Have and Have-Nots



San Jose

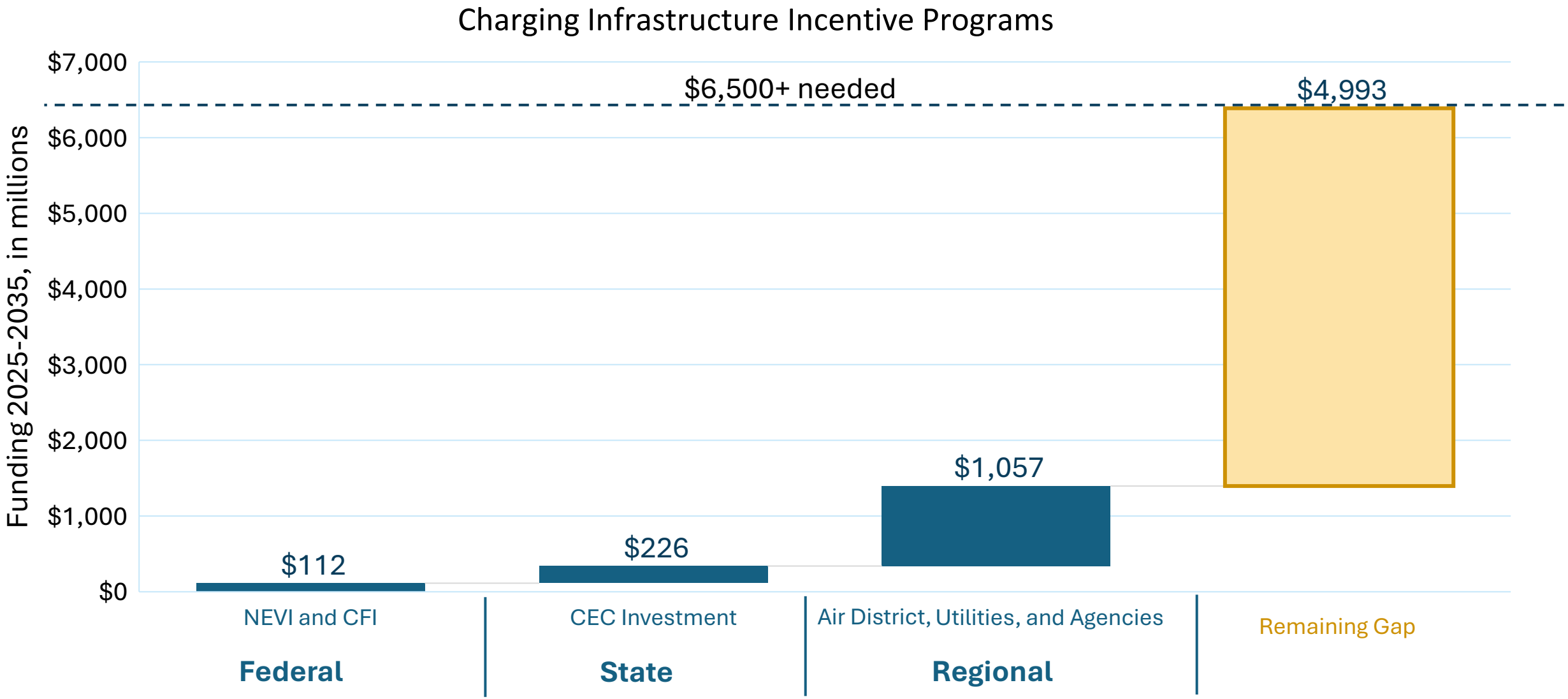


East Oakland

- Charging infrastructure gaps persist today. Even though the East Oakland map shows a denser neighborhood, potential charging deserts are circled in red compared to the San Jose map.
- Inequities and community disadvantages don't always result in a charging desert but are often correlated.

Source: Alternative Fuels Data Center, Alternative Fueling Station Locator, November 2024.

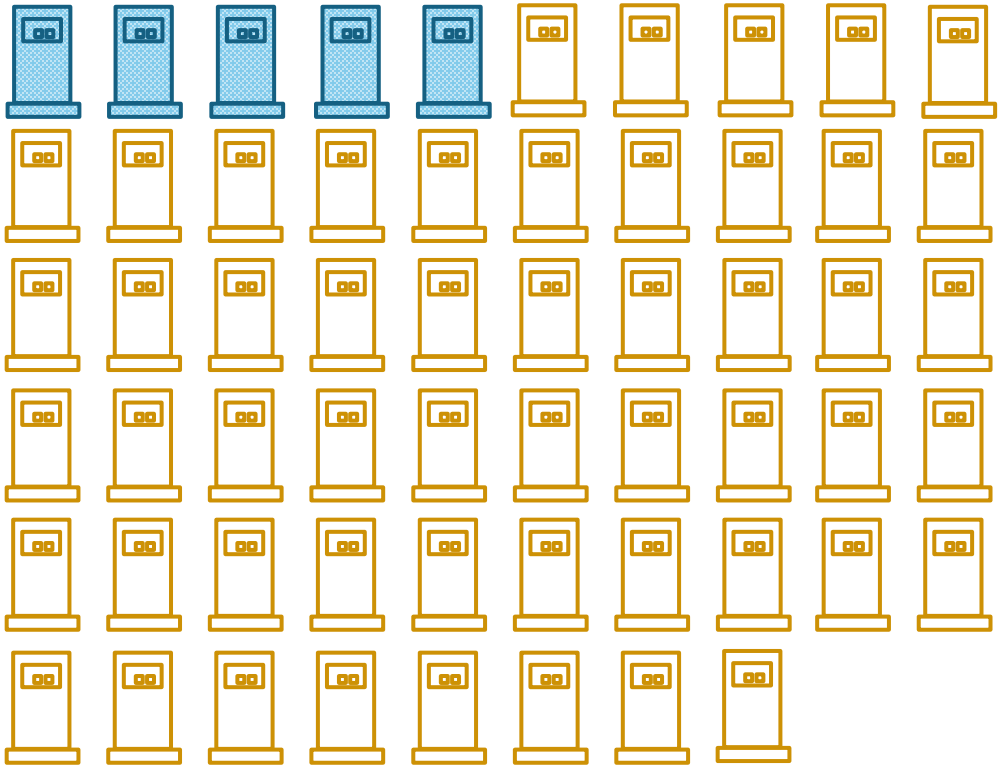
Charging Investment: Much More Is Needed



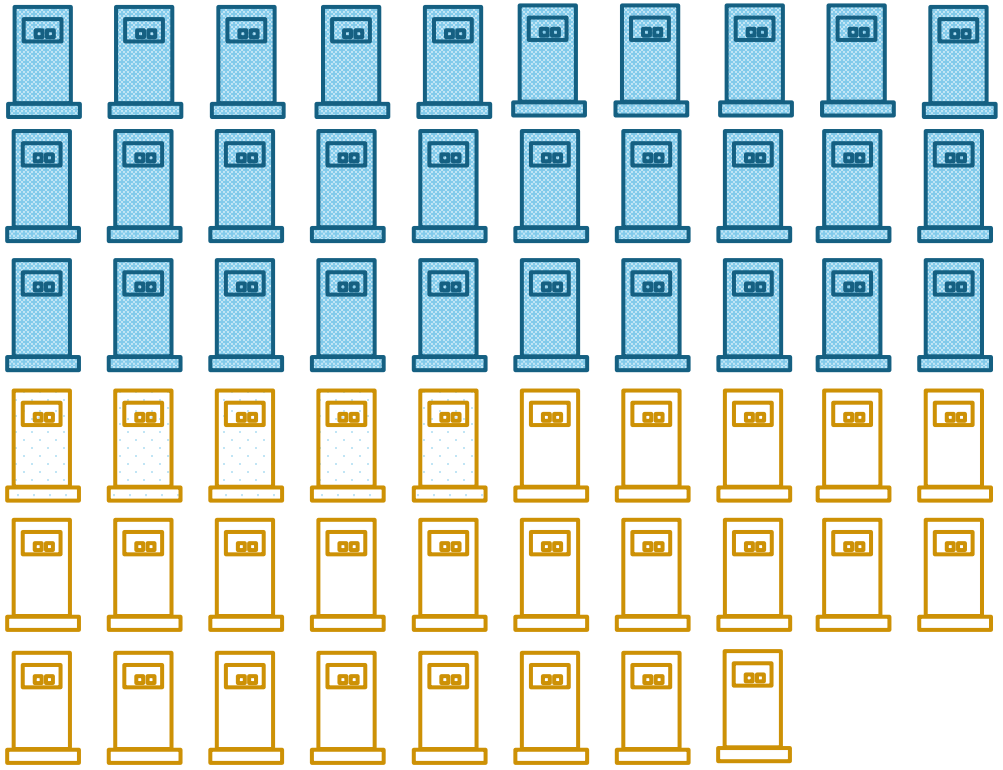
Source: Bipartisan Infrastructure Law. CAL Electric Vehicle Infrastructure Project. Convenient High-Visibility Low-Cost L2 Charging. Communities in Charge. Bay Area Air District Charge! PBA 2050+. Pacific Gas & Electric. Peninsula Clean Energy. Marin Clean Energy. Silicon Valley Power. Silicon Valley Clean Energy. Alameda Municipal Power. Transportation Authority of Marin.

Plan Bay Area: Helping Narrow the Charging Gap

EN8 aims to move our region from here....



to there by 2035.



- Plan Bay Area 2050+ Strategy EN8 includes a **Charger Initiative to invest $720 million** to help deploy 250,000 charging ports in much needed areas across the region.
- Both the **Vehicle Initiative** and **Charger Initiative** are essential for helping the Bay Area meet its SB 375 greenhouse (GHG) reduction target.

Source: California Energy Commission Zero Emission Vehicle and Infrastructure Statistics Dashboard, Electric Vehicle Chargers in California, August 26, 2024, MTC Plan Bay Area 2050+.

All Hands Needed: Collaboration & Partnerships

Collaboration and partnerships are necessary to achieve the region's and state's goals

- US Department of Transportation
- US Department of Energy
- US Environmental Protection Agency

- State Legislature
- California Air Resources Board (CARB)
- California Energy Commission (CEC)
- Governor's Office of Business and Economic Development (GO-Biz)

- MTC
- Bay Area Air District
- PG&E
- Community Choice Aggregators (Ava, MCE, PCE, SCP, SVCE)

- County Transportation Agencies
- Counties and Cities
- Transit Agencies

Roles include:

- Funding (e.g., vehicle and charging grants)
- Policy (e.g., permit streamlining)
- Technical assistance (e.g., EV readiness planning assistance)
- Project delivery (e.g., charger installation)
- Outreach & education (e.g., ride and drive events)

Zero-Emission Bus Transition: Challenges Ahead

- **CARB Innovative Clean Transit Rule**: bus purchase requirements underway and ramping up to **100% zero-emission** (battery electric or hydrogen fuel cell) by 2029

- **MTC has identified key risks**, including to schedule and budget:
  - Facility and power upgrade delays
  - Vehicle delivery delays
  - Current funding levels insufficient
  - Cost of ZEBs continuing to grow

- Cost of transition (buses, equipment, and facilities), and funding gap, in the **billions of dollars**

Zero-Emission Bus Transition: Alternatives

- **No credit** for bus transition under SB 375 GHG target, **despite costs being included** in Plan's Transportation Element
- **GHG reductions relatively limited** given transit's emission share
- **Tradeoffs** between funding ZEB transition and service levels and/or other capital investments
- **State should reevaluate timeline** for regulation because prioritizing ZEB over other transit needs could adversely impact shared climate goals

Thank you!

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