Electrification Pathway Toward 2050

- **Conventional**: Internal Combustion Engine (ICE) Hybrid Vehicle (ICE and Battery)
- **Plug-in Hybrid Vehicle (PHEV)**: ICE & battery utilizing both gasoline and electricity
- **Zero Emission Vehicle (ZEV)**: Electricity or Hydrogen
Zero Emission Electric Vehicle Attributes

- **Zero Tailpipe Emissions**

- **Energy Diversity**
  - Fuel can be generated from a variety of sources

- **Sustainable**
  - When fuel is produced from low/no carbon sources

- **Fun to Drive**
  - High torque electric drive
  - Low CG for nimble handling

**Fuel Cell Electric Vehicle**

**Battery Electric Vehicle**

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Product Regulatory Affairs

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California vs. Northeast ZEV Sales

California

NE ZEV States

Monthly ATV Market Share - California

Monthly ATV Market Share - NE ZEV States

Product Regulatory Affairs
Conclusions

• Technologies exist to meet both customer needs & societal CO₂ reduction goals

• All technologies and fuels are needed to meet consumer needs and required volumes

• Stable public sector support (regulations & incentives) are needed to
  • Accelerate sales
  • Encourage private sector investment

• Volumes, variety and time will help reduce costs and lower prices

• Rapid growth in consumer demand for electric drive needed for success