



# KEY FINDINGS

**California benefits from the leadership of community and public policy efforts to reduce pollution from vehicles and support the adoption of cleaner alternatives.**

While there is still much to do, these efforts are already paying off in terms of adoption rates for electric vehicles (EVs) and a demonstrated commitment to building the charging station infrastructure.

- California ranks first in the nation in total charging stations installed with 609 stations.
- With 16.3 charging stations per million residents, California also ranks first per capita.

**California is a global leader in technology innovation related to electric vehicles.**

- In 2010, California accounted for 80 percent (\$840 million) of total U.S. and 60 percent of total global venture capital investment in EV-related sectors.
- In the first half of 2011, California attracted 69 percent of global investment in EV-related sectors and 74 percent of United States investment in EV-related sectors (\$467 million).
- California leads the nation and world in growth since 2006 in venture capital investment in EV-related industries.
- California ranks first in the nation in total EV technology patents. Globally, the state trails only Japan and South Korea in patents and exceeds others including Germany, Taiwan and France.
- Research related to EVs is being explored at world-class research institutions around the state. Institutions include the Lawrence Berkeley National Laboratory, the University of California Berkeley, the University of California Davis, and the Luskin School of Public Affairs at the University of California Los Angeles. Topics of research range from batteries, vehicle design, and public policy.

California is well-positioned to lead the way in the U.S. clean transportation revolution with its population of early adopters, advanced technology industries, public policy leadership and research institutions. As a market leader in this growing sector, California can reap significant economic benefits.

**Employment and businesses in California's EV industry are growing and demonstrate the potential for continued growth.**

- California's EV industry has increased 142 percent or 2.4 times since 1995, growing from 740 jobs to 1,790 in January 2010. Most recently from January 2009 to 2010, EV jobs expanded by four percent while total employment in the state dropped by seven percent.
- The Los Angeles Area and Silicon Valley together make up 47 percent state EV employment.
- Different hubs of specialization are emerging across the state.
  - Silicon Valley leads in Electric Vehicles.
  - The San Diego Region is top in Motor Vehicle Components and Advanced Batteries.
  - The Bay Area is strong in Charging Infrastructure.
- The Los Angeles Area is particularly strong in Advanced Batteries.
- Manufacturing makes up 59 percent of EV industry jobs and grew 132 percent 2004 to 2010.
- Research & Development accounted for 14 percent of employment in 2010 and surged by 434 percent between 2004 and 2010.

**Addressing the barriers to EV commercialization presents economic opportunities and once addressed, will encourage widespread adoption in California, the rest of the country, and abroad.**

- Vehicle batteries are currently expensive and economic opportunities exist for improving technology, reducing systems costs, adjusting for varying weather conditions, and recycling and creating post-vehicle secondary uses.
- Finding the appropriate models for both the distribution of public charging infrastructure and easy installation of private units that integrate seamlessly into the electricity grid will boost the viability of EVs as transportation options.