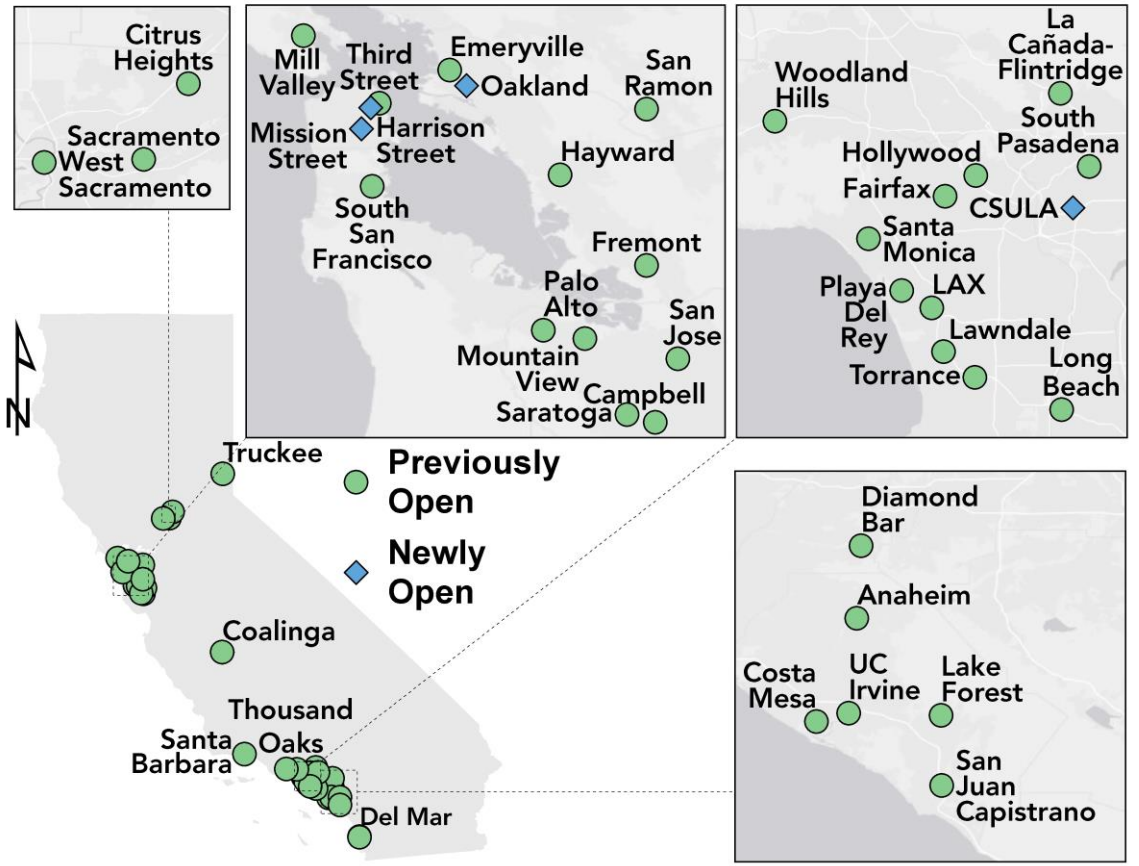
2020 ANNUAL EVALUATION OF FUEL CELL ELECTRIC VEHICLE DEPLOYMENT & HYDROGEN FUEL STATION NETWORK DEVELOPMENT

FINDINGS

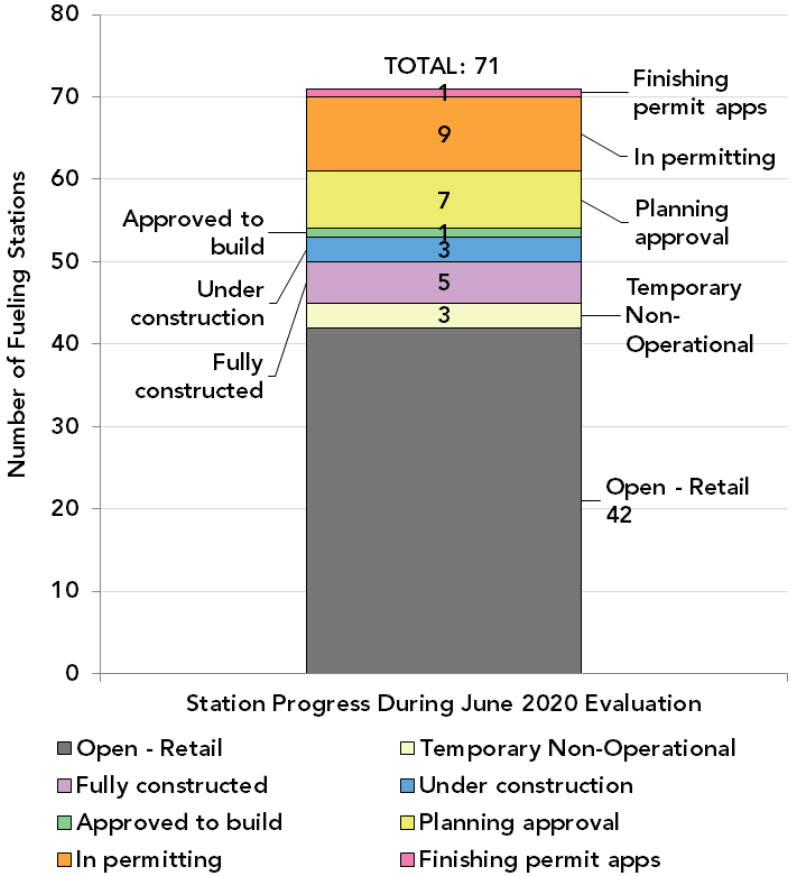
Image courtesy of CaFCP

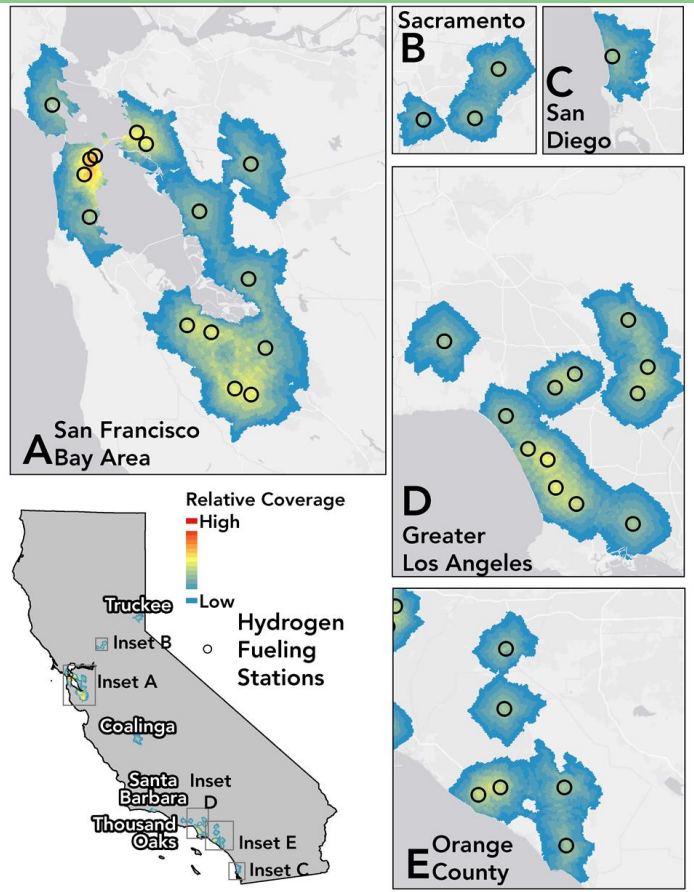
Finding 1

California's hydrogen fueling network includes 42 Open-Retail stations due to a mix of growth and contraction in the past year



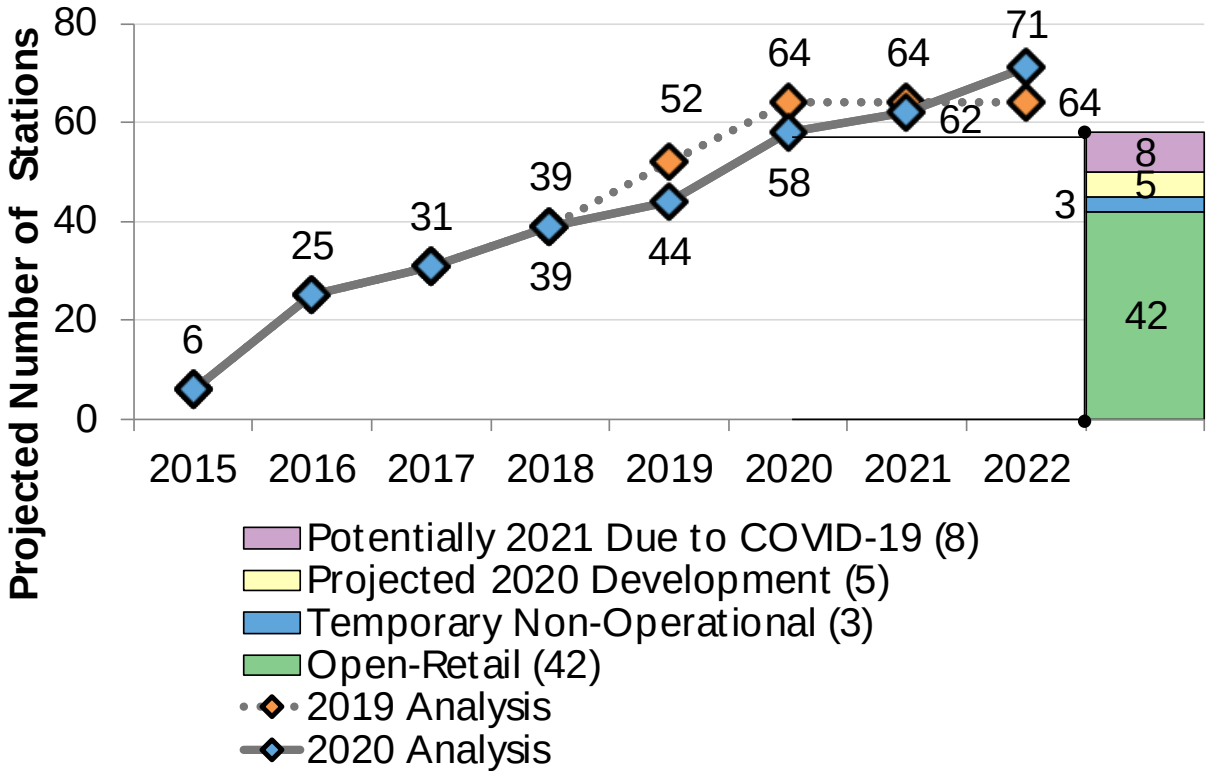
Finding 1 Extended Discussion





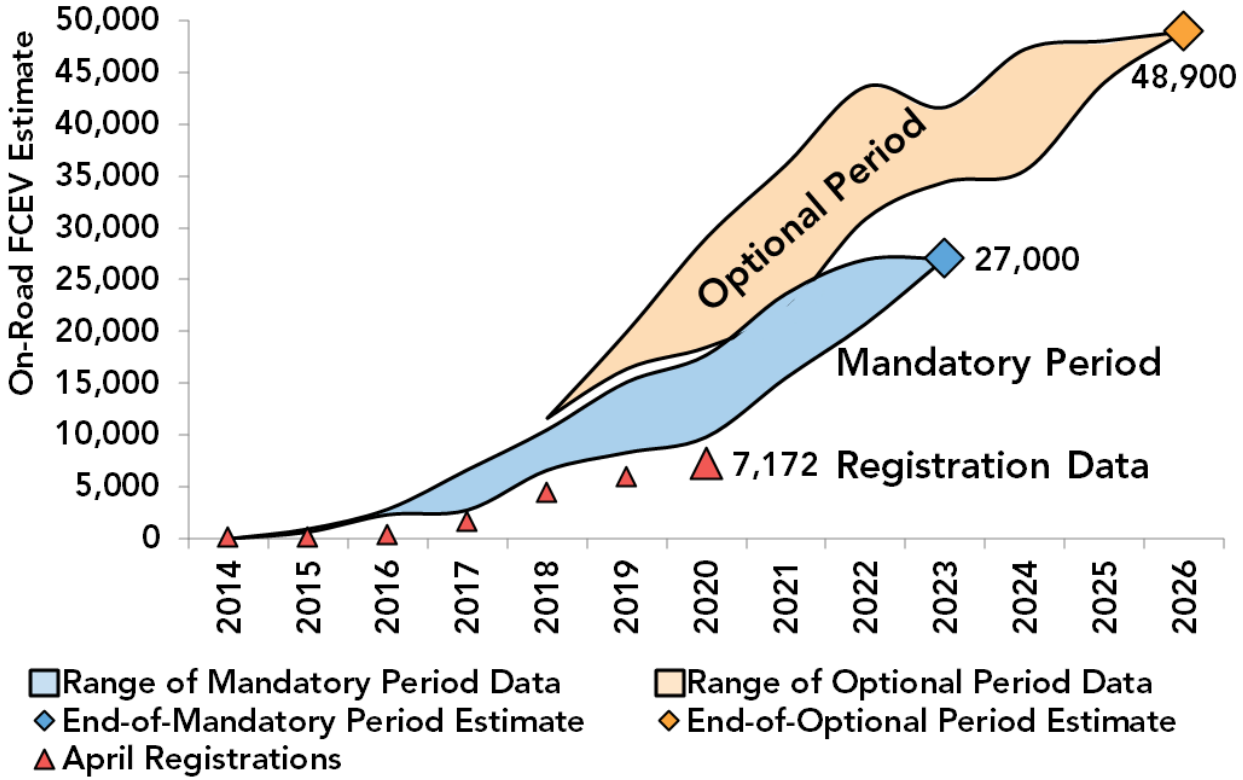
Finding 2

All stations funded and in development are projected to be Open-Retail by the end of 2022, even though progress in the past year exhibited delays and may be further affected by COVID-19



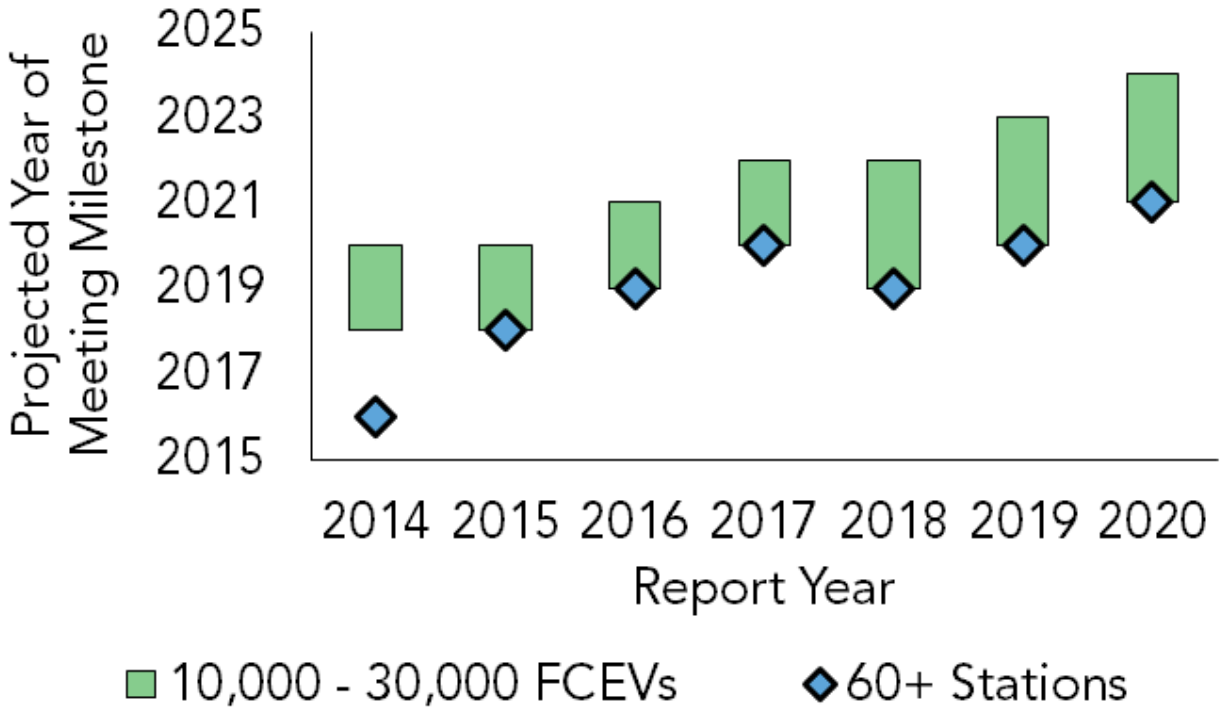
Finding 3

Auto manufacturer projections for FCEV deployment have shifted one year compared to prior estimates while maintaining the projected pace of acceleration



Finding 4

Auto manufacturer survey responses align with projected station deployment



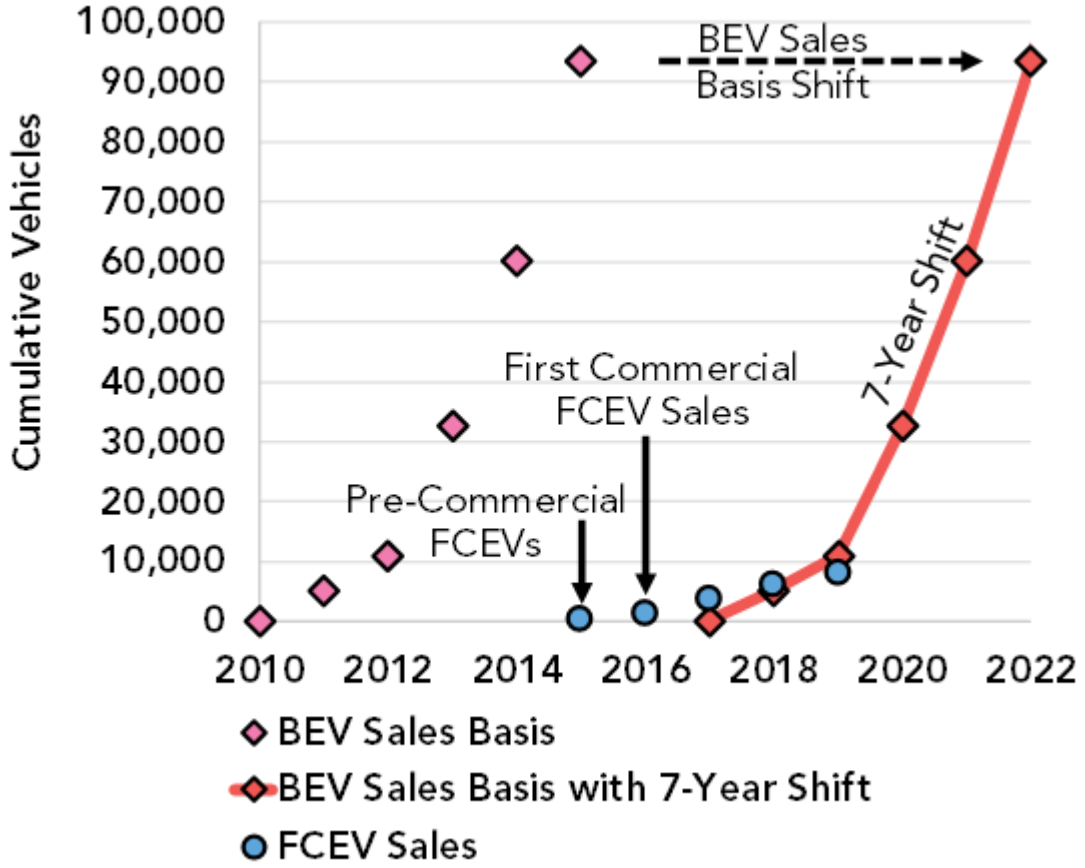
Finding 4: Extended Discussion

Due to 2019 survey results, initiated one-on-one interviews with auto manufacturers to discuss future FCEV plans in more detail

- Four major messages received
  - Industry Commitment to FCEV Market Development Remains a Priority
  - FCEVs and BEVs Together Remain the Overall ZEV Strategy
  - Survey Responses are Driven by Internal Deliberations and Affected by Uncertainties in Pace of Network Development
  - ZEV (including FCEV) Deployment Projections are Driven by Global and Local Markets and Policies

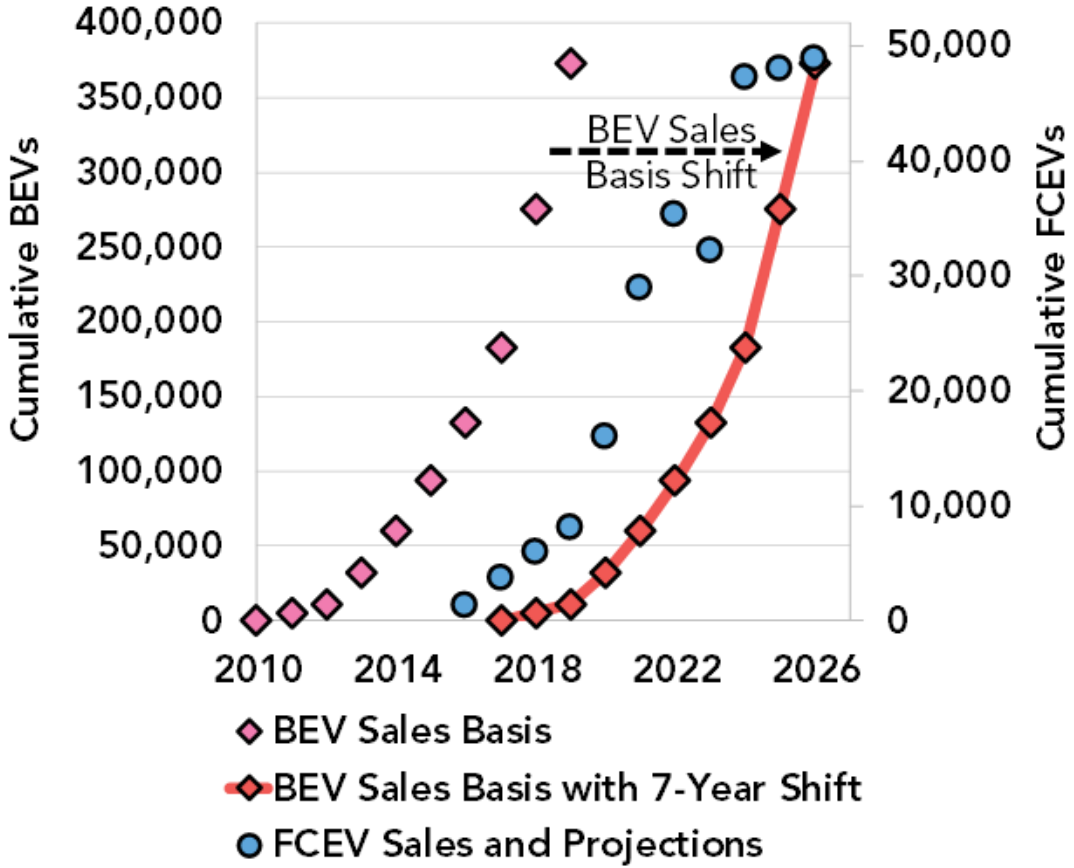
Finding 5

Historical FCEV deployment data appear to follow a similar new technology adoption trend as battery electric vehicles and validate State efforts to continue funding hydrogen fueling stations



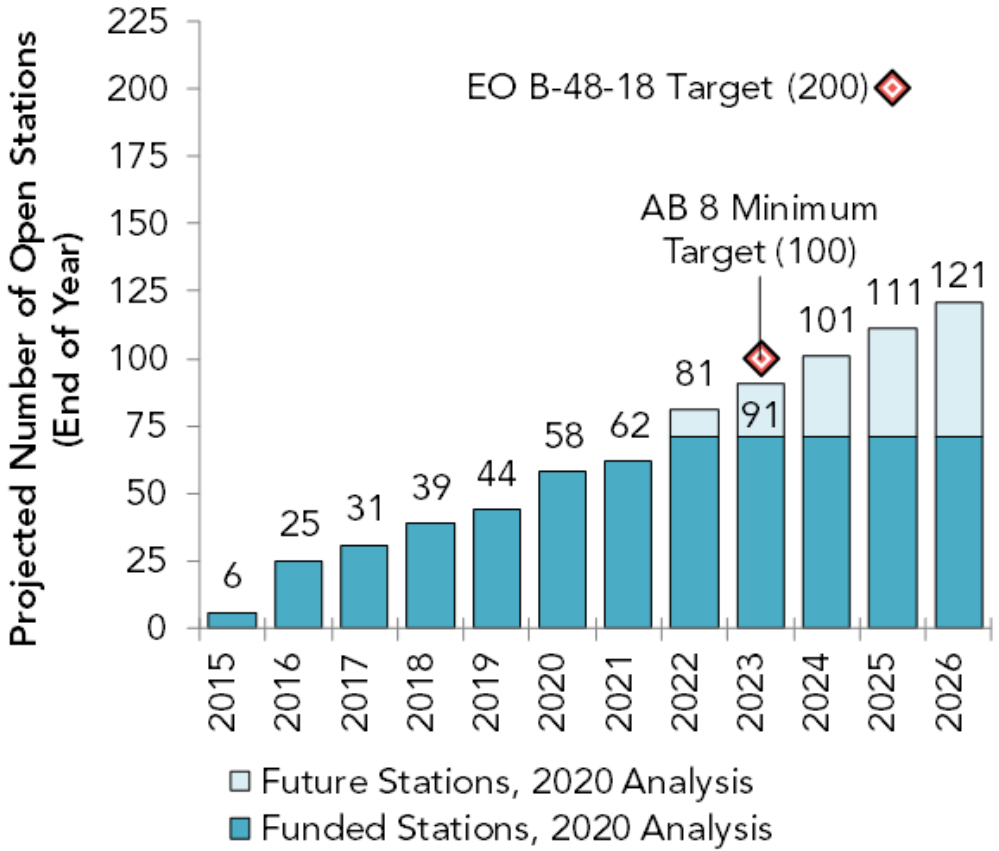
Finding 5 Extended Discussion

FCEV projections also exhibit the same timing in “bending the curve” as BEVs 7 years prior



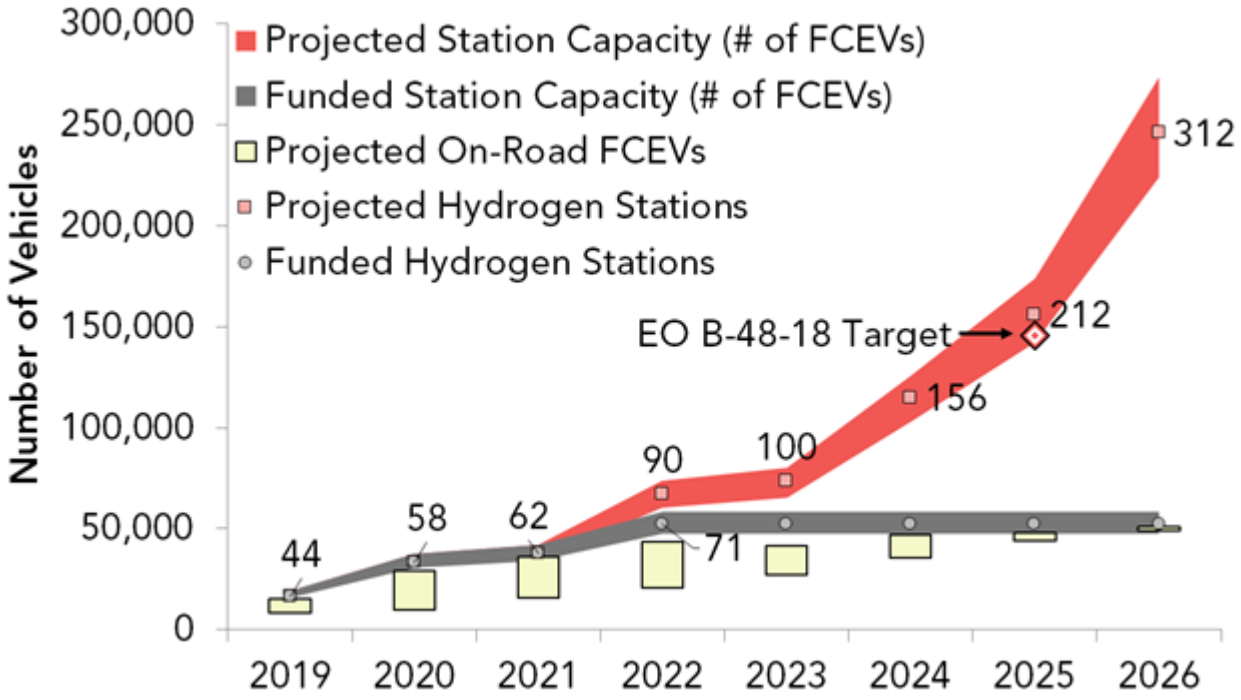
Finding 6

Acceleration of station network development is essential in the immediate future to reach State and industry goals



Finding 7

Additional station funding remains necessary to achieve hydrogen station targets and enable vehicle deployments beyond current projections



Finding 8

Sourcing of renewable energy and feedstocks to support California's growth in hydrogen fuel demand continues to grow due to industry efforts and State incentives