



AFPM

American
Fuel & Petrochemical
Manufacturers

Finding Opportunity Amid Our Challenges

April 12, 2024 | Jaime Zarraby

Section 1

The Landscape





New issue at play

Car bans: A salient issue in 2024

What is happening

Federal Actions

EPA Light- and Medium-Duty Vehicle
GHG Standards

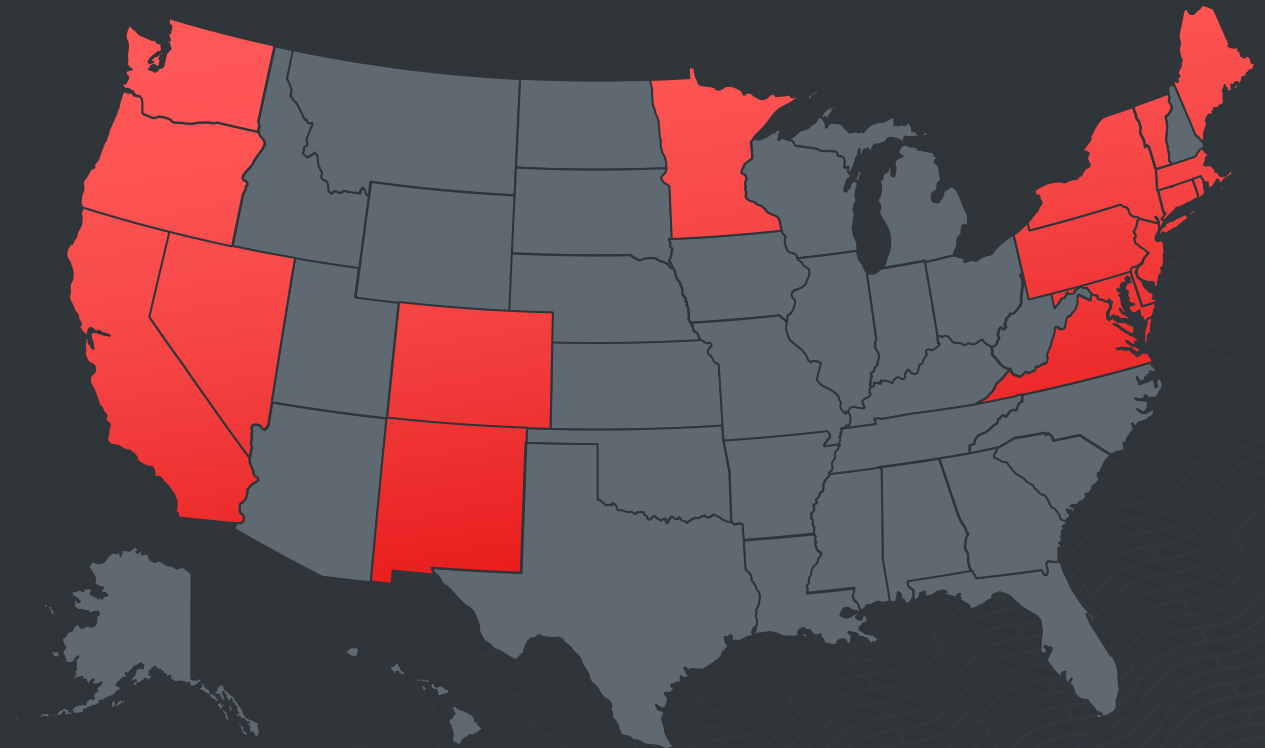
EPA Heavy-Duty Vehicle GHG Standards

DOT Fuel Economy Standards

California Ban Decision

EV Incentives

State Actions





But is it *really* a ban?

Yes, it is.

- Kimberley Strassel, WSJ, 3/21/2024

Which cars meet the EPA standards on their own?

Based on review of fueleconomy.gov values for MY2023

	Gasoline-powered ICEVs	Hybrids	Plug-in hybrids	Battery electric
● Do meet	—	—	5 models	All 144 models
● Do not meet	0/919 models	0/179 models	39 models	—

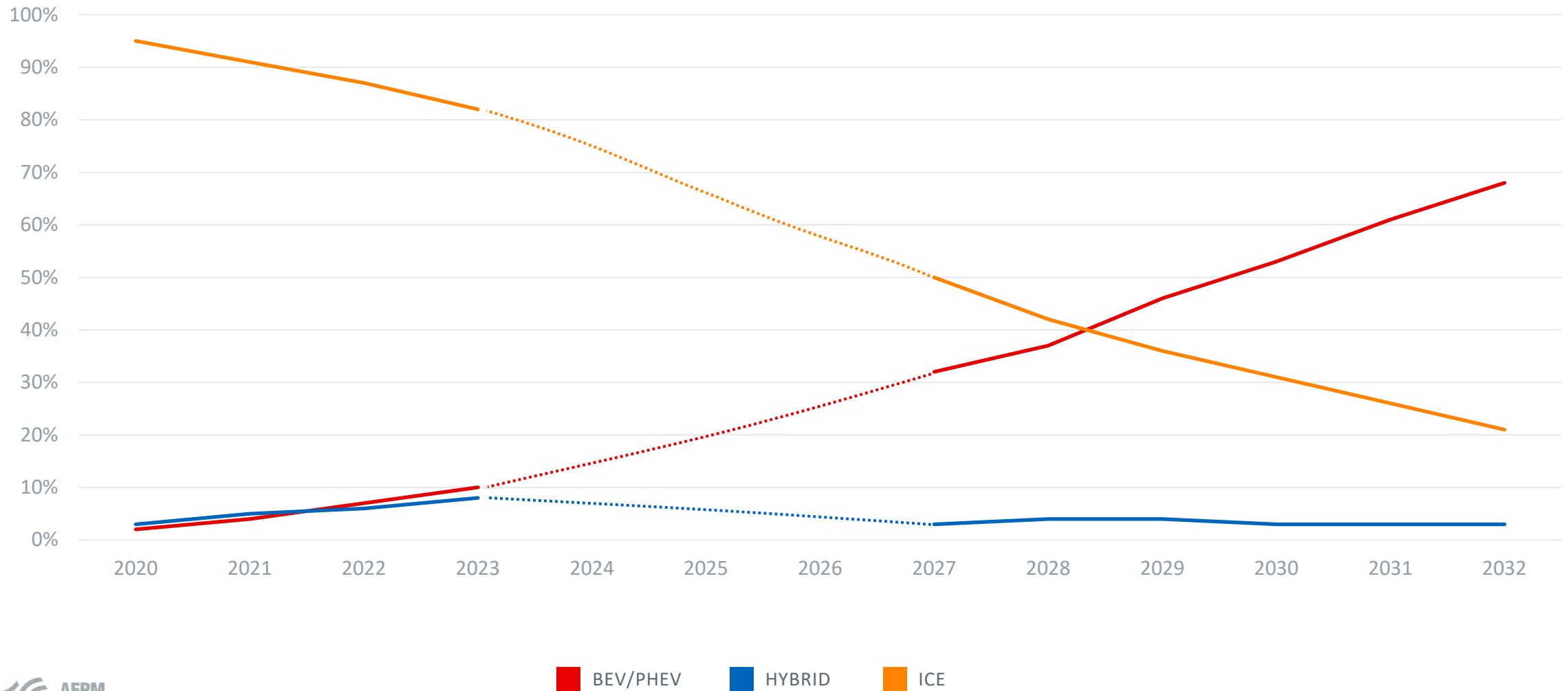


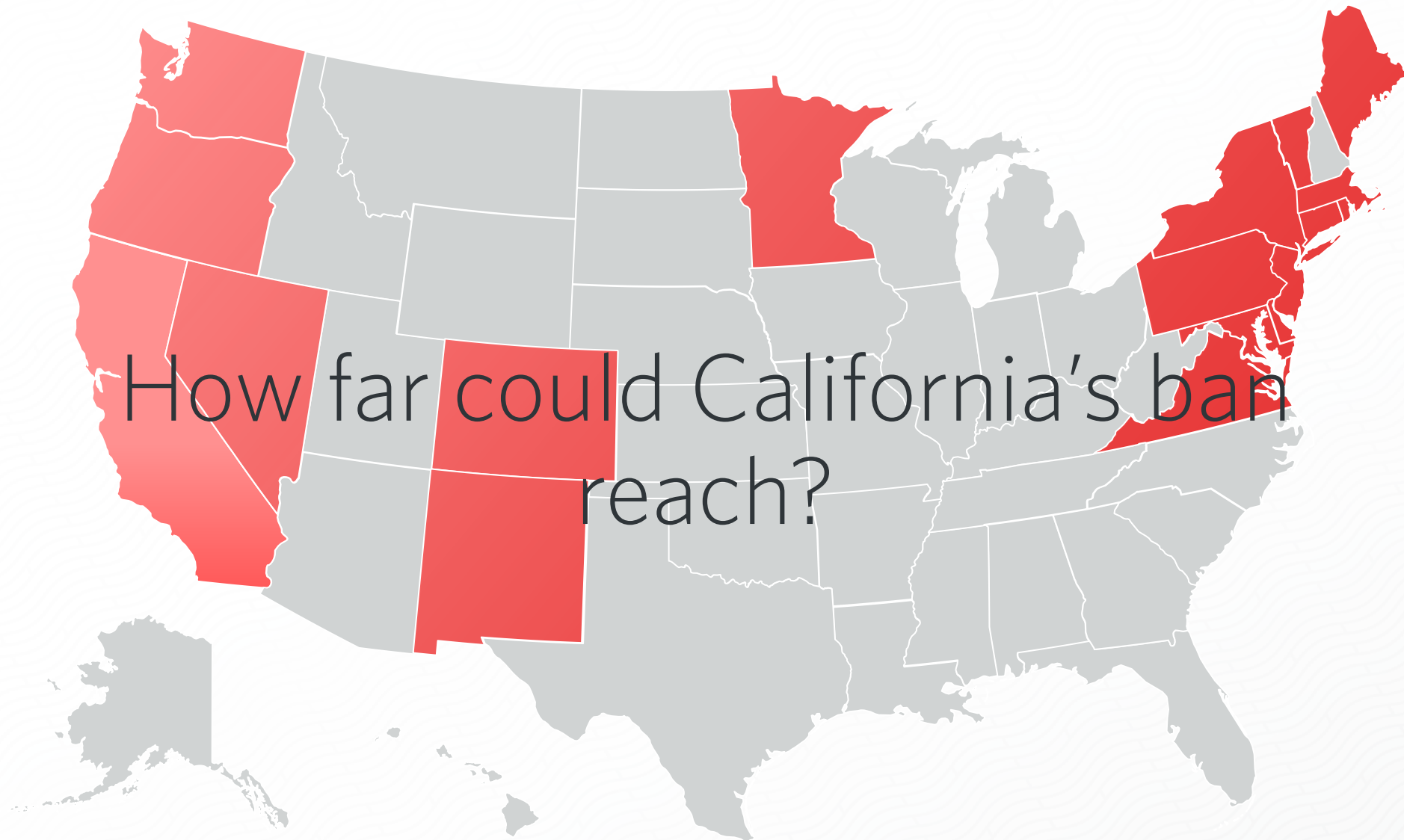
Scenario: Pickup Trucks



To sell just one gas-powered pickup in 2032, automakers will also need to sell **at least three EVs.**

What is the impact of EPA's LDV rule on the fleet?





Forbes

**The New U.S. Rules That Are Phasing
Out Incandescent Light Bulbs: Watt You
Need To Know**

We've seen this
playbook before.

AD
ARCHITECTURAL DIGEST

Need to Know

**Incandescent Light Bulb Ban: What You
Need to Know**



**What you need to know about
the incandescent light bulb ban**

Section 2

Market Realities

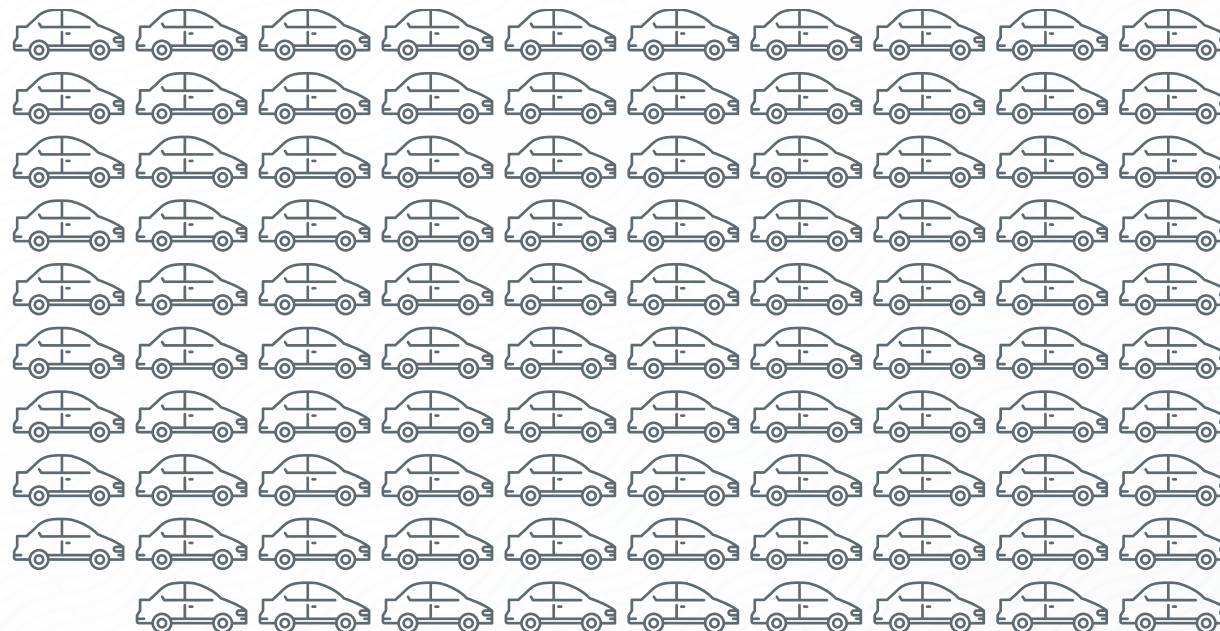
Cars on the road today

EVs represent about
1% of total cars and
trucks on the road today.

DOE Alternative Fuels Data Center and Experian
Automotive's Market Trends Q3 2023 Report



EVs

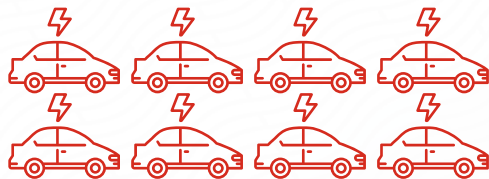


Total vehicles on the road

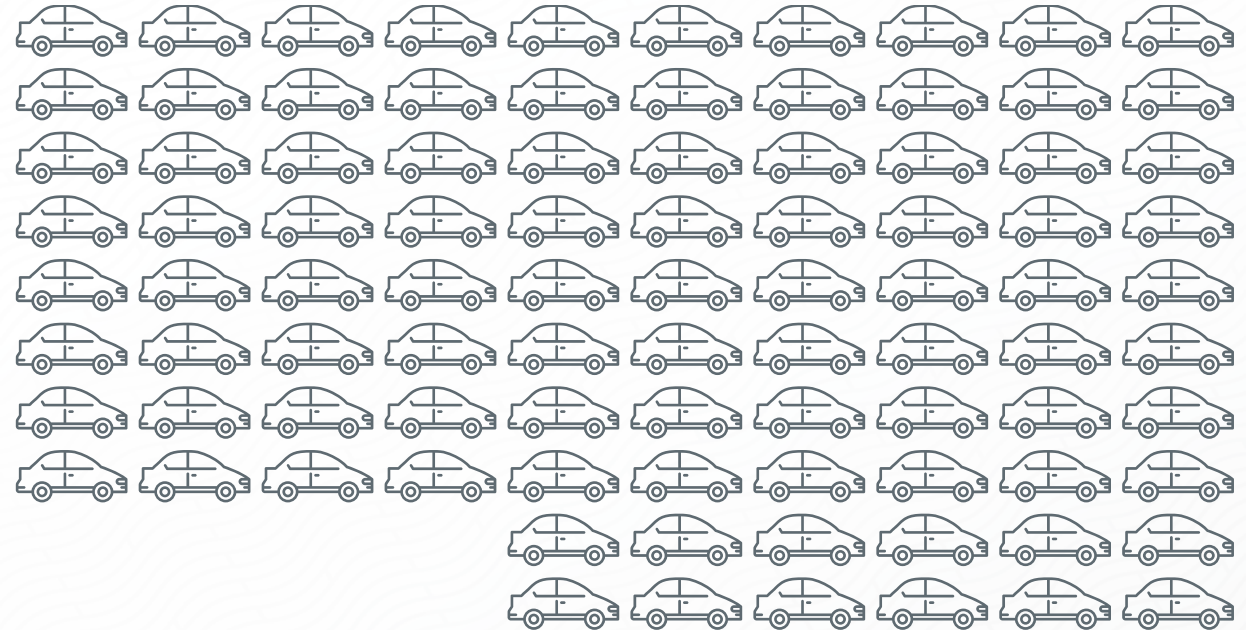
2023 new car sales

Last year, EVs accounted for **less than 8% of overall vehicle sales.**

Kelly Blue Book



EVs

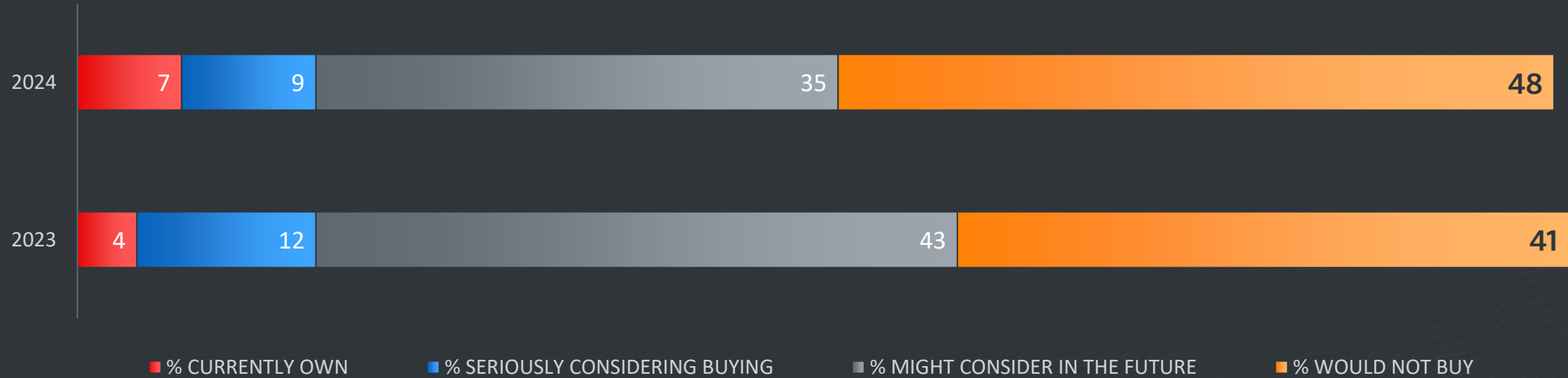


Total vehicles on the road

Consumer outlook

Poll: Thinking now about electric vehicles, which of the following applies to you:
You currently own an electric vehicle, you are seriously considering buying an electric vehicle,
you might consider buying an electric vehicle in the future, or you would not buy an electric vehicle?

Gallup poll, 2024



Percentage with no opinion not shown.

Price

EVs are about **10% more expensive** than the overall new car market.

Average EV price: **\$50,000+**

Only **2 EV models** in December had MSRPs below \$40,000.

Kelly Blue Book, CarEdge

Infrastructure challenges

To get to 50% BEV by 2030:

We would need

1.2 million public chargers
nationwide

McKinsey

We'd have to add

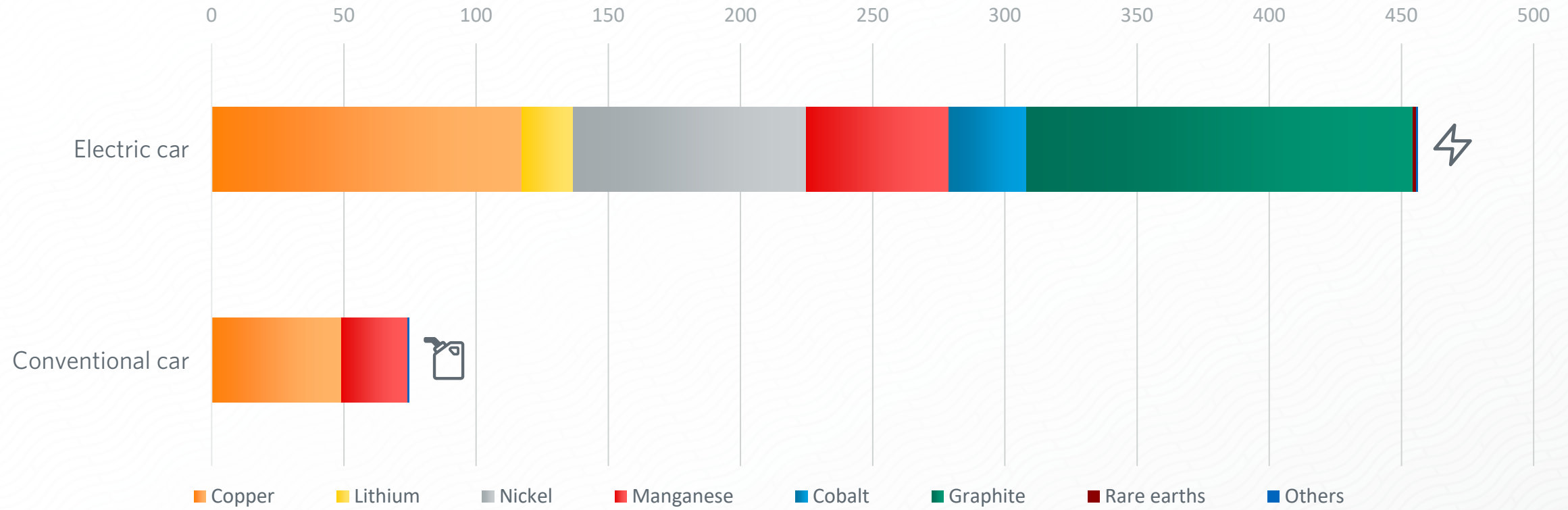
500+ new public charging units
every day for the next 5.5 years

U.S. Alternative Fuels
Data Center



BEVs require 6x the minerals of gas vehicles

~384 new mines needed for EV & energy storage batteries by 2035 (Benchmark Mineral Intelligence)



Section 3

AFPM's Campaign



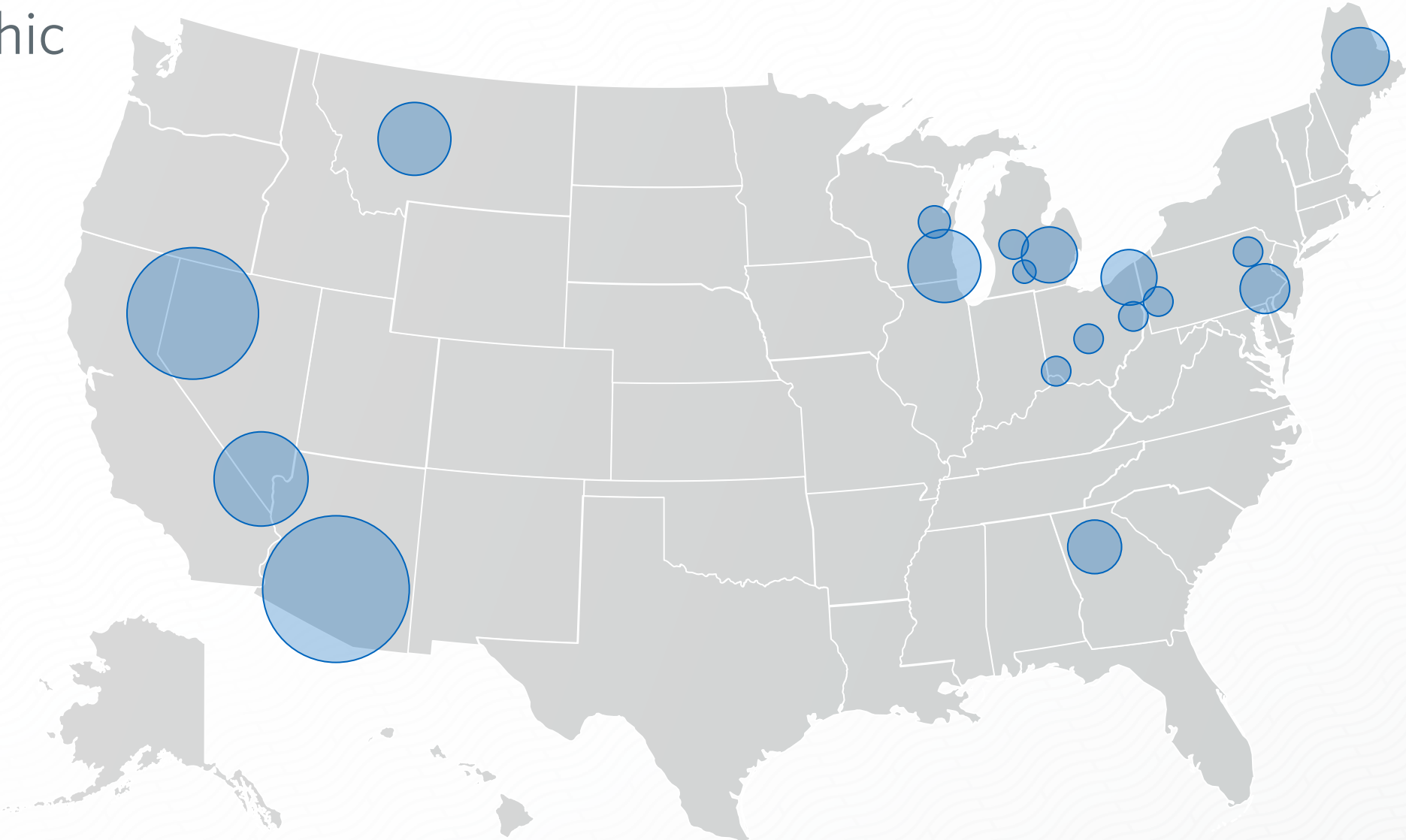
What we're doing about it

Raising
awareness

Elevating
opposition

Highlighting
sensible
alternatives

Geographic focus



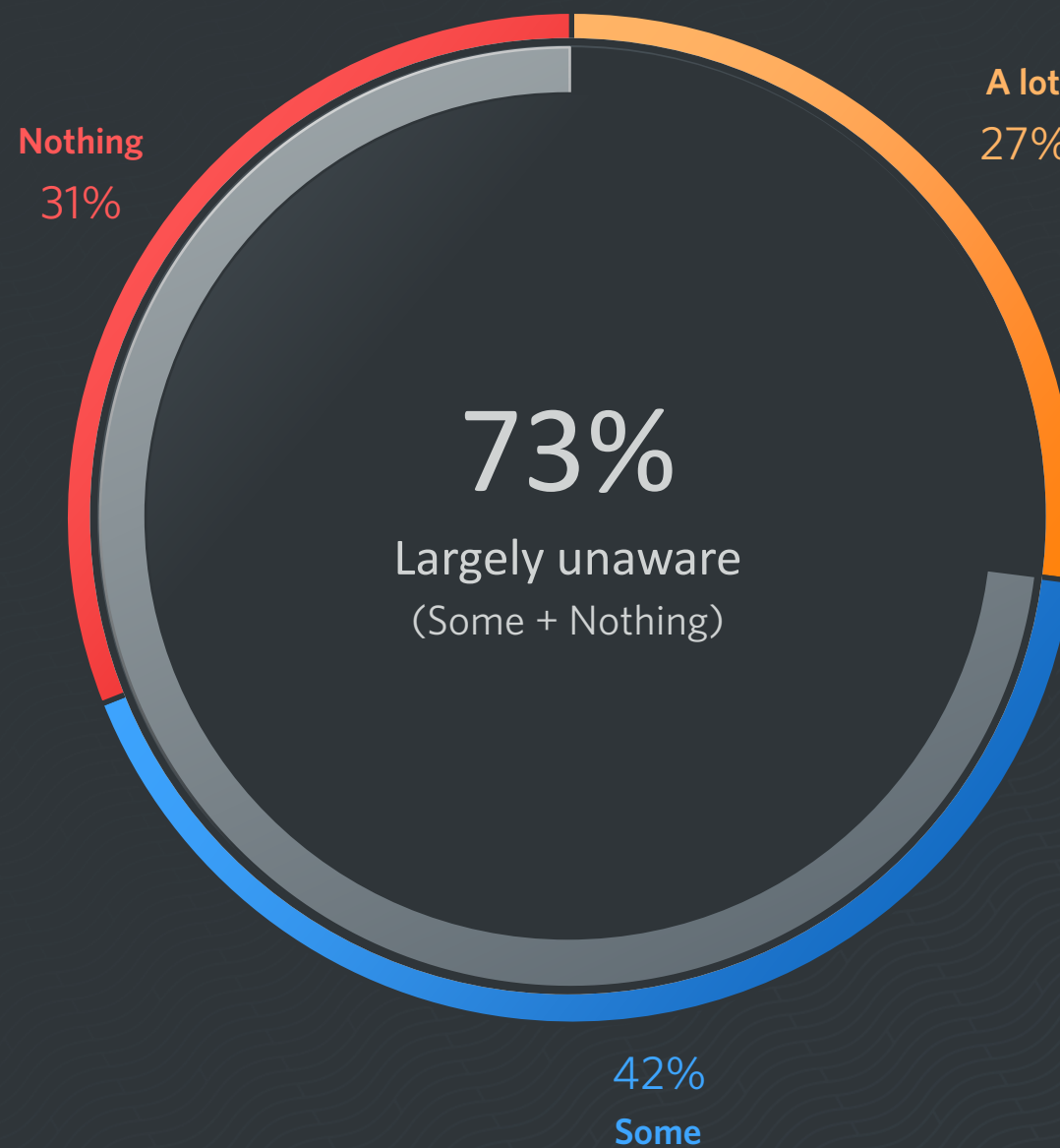
Awareness is low

73% of people have seen “*just some*” or “*nothing*” about states adopting car bans.

Poll:

How much have you seen, read or heard recently about states adopting car ban laws that started in California, ultimately banning all sales of gas-fueled vehicles by 2035?

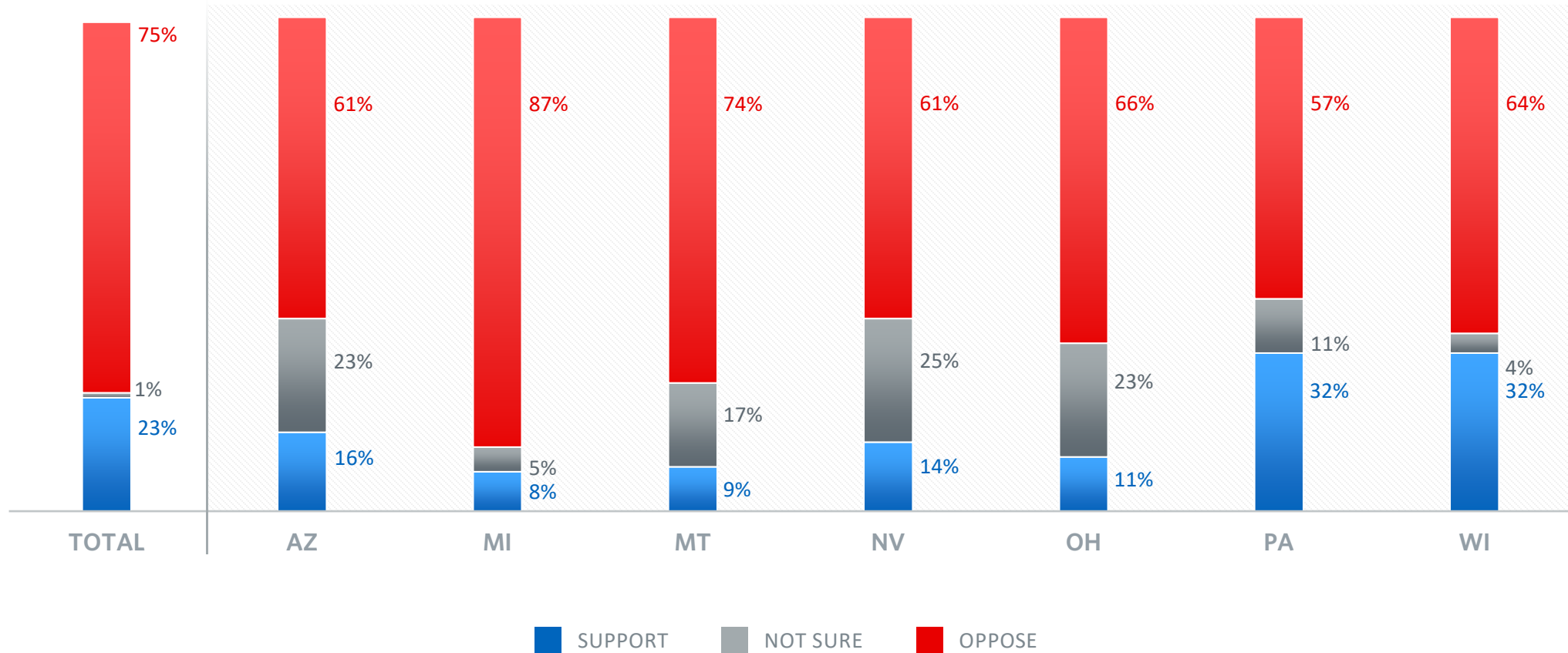
■ A LOT ■ SOME ■ NOTHING ■ LARGELY UNAWARE



Large majorities oppose car bans

Poll:

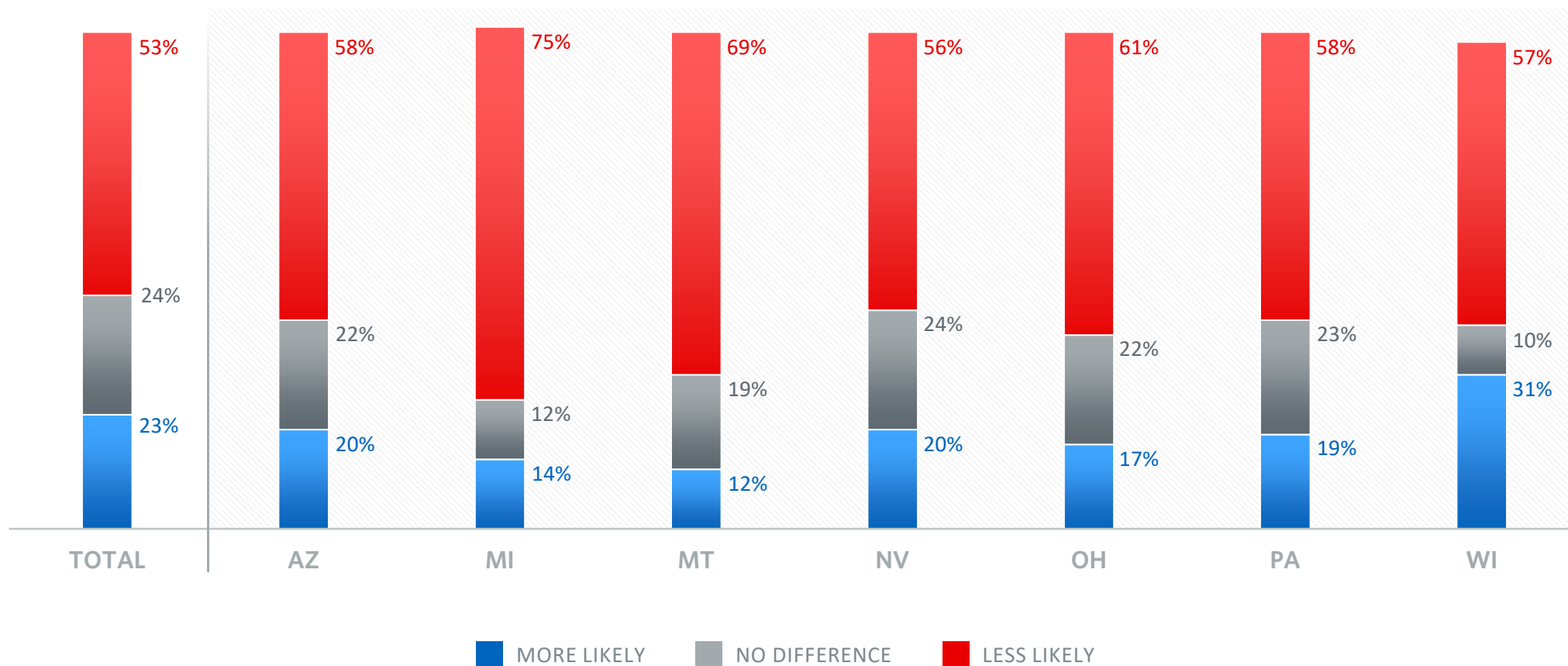
Do you support or oppose government policies to ban new gas, diesel and hybrid vehicles, effectively mandating electric vehicles?



And reject candidates who support gas car bans

Poll:

Would you be more or less likely to vote for a candidate who supports banning the sale of gas-fueled cars?

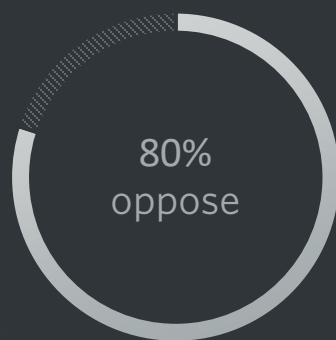


Not just a GOP issue

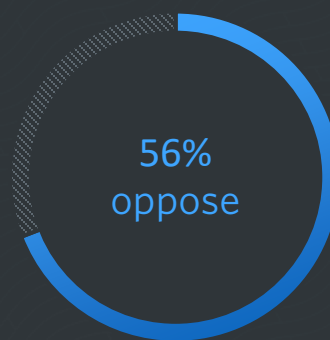
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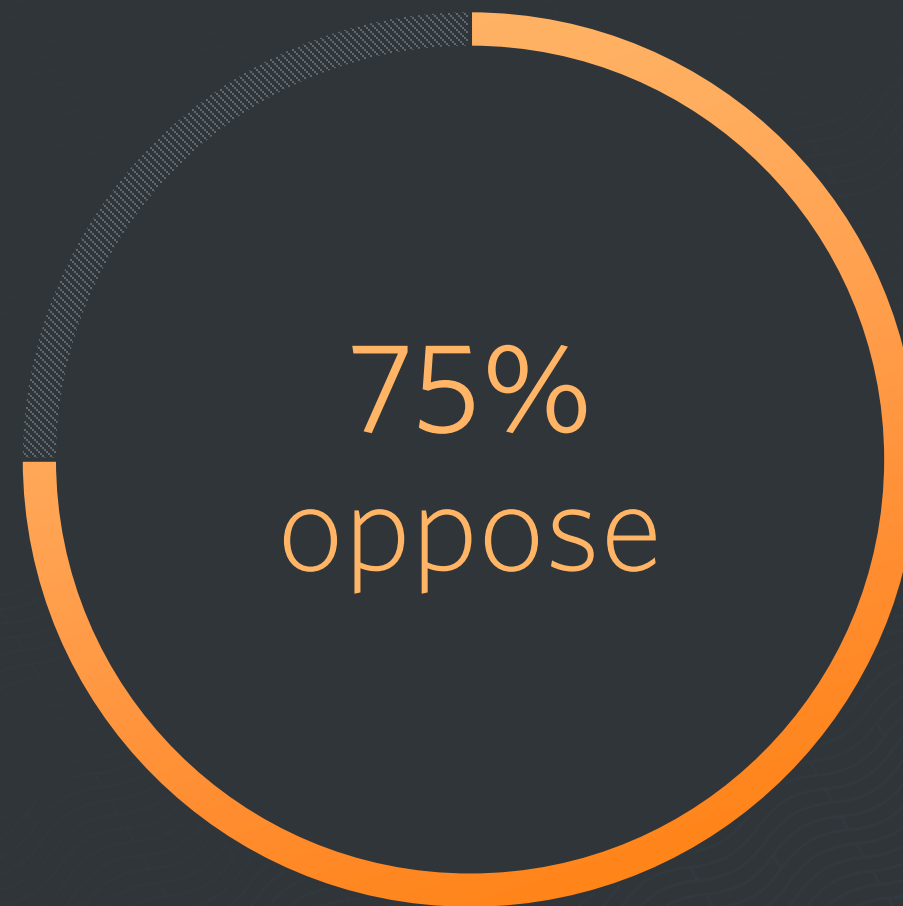
Republican



Independent



Democrat



Overall



Top concerns about car bans

The policy
itself



Government
overreach



Not for
everyone

Approach





How you can help

Join us in
the fight

dontbanourcars.com ▶



1. Visit dontbanourcars.com
2. Champion the industry
3. Get others involved