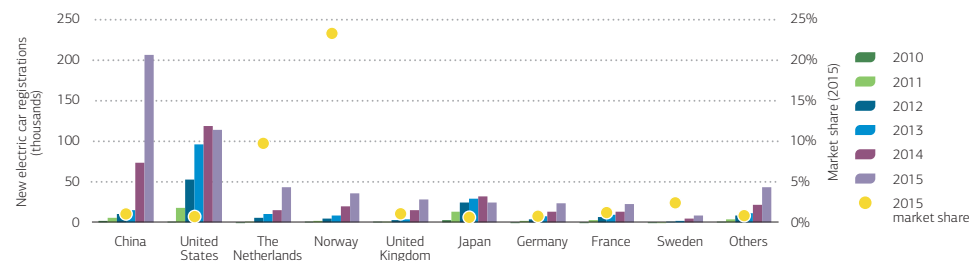


Electric vehicles

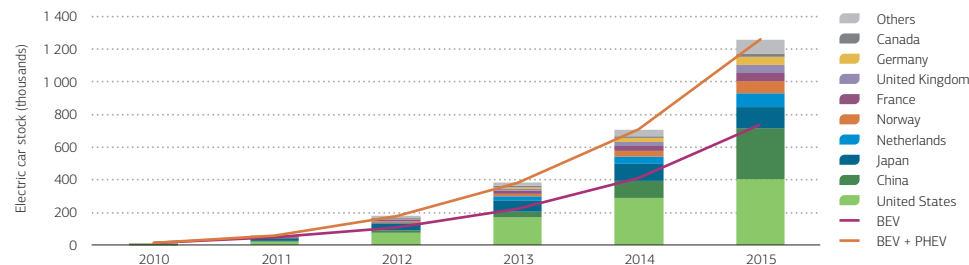
The year 2015 saw the global threshold of 1 million electric cars¹ on the road exceeded, closing at 1.26 million. In 2014, only about half of today's electric car stock existed. In 2005, electric cars were still measured in hundreds. 2015 also saw more than 200 million electric two wheelers on the road, and 170 000 buses, primarily in China.

EV sales and market share in a selection of countries and regions, 2015



Key point: The two main electric car markets are China and the United States. Seven countries have reached over 1% EV market share in 2015 (Norway, the Netherlands, Sweden, Denmark, France, China and the United Kingdom).

Evolution of the global electric car stock, 2010-15

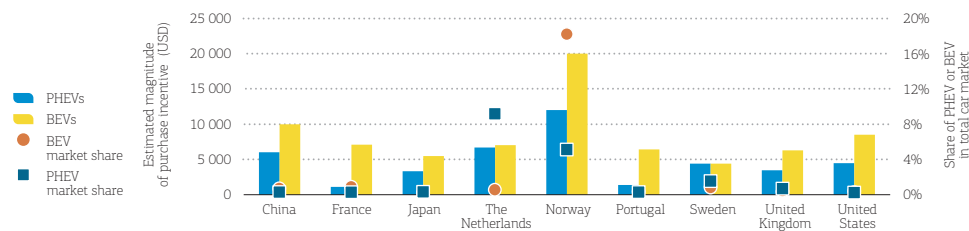


Key point: The uptake of electric cars has been growing since 2010, with a BEV uptake slightly ahead of PHEV uptake. 80% of the electric cars on road worldwide are located in the United States, China, Japan, the Netherlands and Norway.

Policy support

Purchase incentives are among the most relevant and the most effective instruments promoting electric car sales.

Estimates of purchase incentives and market shares for electric cars (BEVs and PHEVs), 2015



Key point: Policies deployed in different countries result in different purchase incentives and BEV over PHEV adoption patterns, with Norway's purchase incentives level standing out for both BEVs and PHEVs.

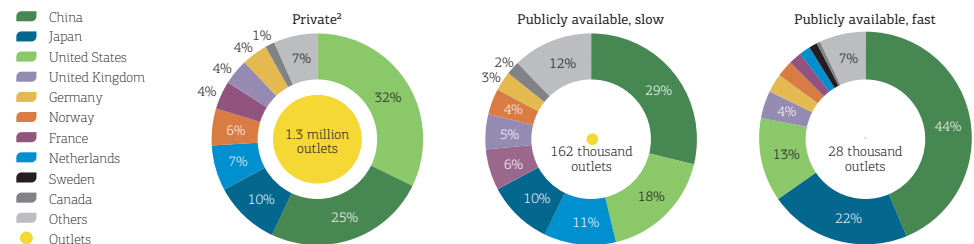
¹ Electric cars refers here to battery electric (BEVs) and plug-in hybrid electric vehicles (PHEVs).

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Charging infrastructure

There are an estimated total of 1.45 million electric car charging points worldwide in 2015. Publicly accessible charging facilities have been following the growth trend of the electric car stock in the past year.

Geographical distribution of the 2015 stock of EVSE outlets by charger type

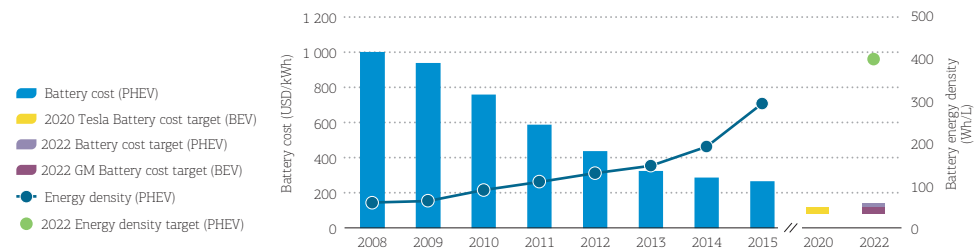


Key point: Country profiles differ with respect to the development of EVSE infrastructure. China and Japan account for more than 65% of fast-charging outlets. The geographical distribution of publicly accessible slow chargers is closer to the distribution of electric cars and private charging outlets.

Battery technology improvements

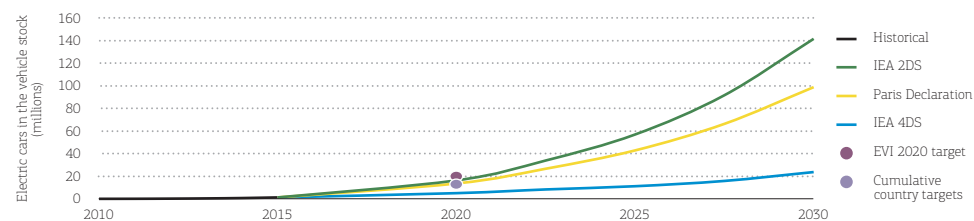
Since 2008, battery costs were cut by a factor four and battery energy density had a fivefold increase. Technological developments hold the promise to continue to deliver improvements in the forthcoming years.

Evolution of battery energy density and cost



Key point: The trends of battery energy density and cost over the past decade give encouraging signs on the possibility of meeting targets defined by carmakers and the United States Department of Energy (US DOE) for 2020 and 2022.

Deployment scenarios for the stock of electric cars to 2030



Key point: Individual country commitments would bring 13 million electric cars on the road by 2020. The EVI aims at a deployment of 20 million electric cars by 2020. In both cases, reaching 2020 deployment targets for BEVs and PHEVs requires a sizeable growth of the electric car stock. Meeting 2030 decarbonisation and sustainability goals requires a major deployment of electric cars in the 2020s.

² Private chargers are estimated assuming that each electric vehicles is coupled with a private charger.

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