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RESEARCH

How Hawaii Can Lead The World in EV Deployment

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Introduction

Navigant Research provides in-depth analysis of global clean technology markets.

The team's research methodology combines supply-side industry analysis, end-user primary research and demand assessment, and deep examination of technology trends to provide a comprehensive view of the Smart Energy ecosystem.

Sector Focus:

Smart Energy

Smart Utilities

Smart Transportation

Smart Industry

Smart Buildings

Research Offerings:

Research Reports

Subscription Research Services

Custom Market Research

- Go-To-Market Strategy
- Custom Market Analysis
- Market Sizing & Forecasts
- Primary Research
- Technology Evaluation
- Commercial Due Diligence
- Competitive Benchmarking
- Strategic Advisory Sessions

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Research Services

SMART ENERGY

- Solar Energy
- Wind Energy
- Emerging Renewables
- Biofuels
- Biopower
- Energy Storage
- Advanced Batteries
- Fuel Cells
- Distributed Generation
- Microgrids

SMART UTILITIES

- Smart Meters
- Transmission Systems
- Distribution Optimization
- Home Energy Management
- Demand Response
- Utility Communication Networks
- Smart Grid Technologies
- Utility Innovations

SMART INDUSTRY

- Smart Cities
- Industrial Innovations

SMART TRANSPORTATION

- Electric Vehicles
- Light Electric Vehicles
- Natural Gas Vehicles
- Commercial Vehicle Innovations
- Advanced Transportation Technologies

SMART BUILDINGS

- Building Energy Management
- Building Automation Systems
- Energy Efficient Lighting
- Smart Building Technologies
- Green Buildings

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Smart Transportation Program

SMART TRANSPORTATION

- Electric Vehicles
- Light Electric Vehicles
- Natural Gas Vehicles
- Commercial Vehicle Innovations
- Advanced Transportation Technologies

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How does Hawaii Measure Up?

Accomplishments:

- Incentives for parking, driving PEVs
- Requirement for EV charging locations in parking lots
- University involvement
- Laws addressing MUD issues
- Fleets beginning to include PEVs
- Foundation of EV charging infrastructure
- Addressed demand charges from DC charging

Work To Be Done:

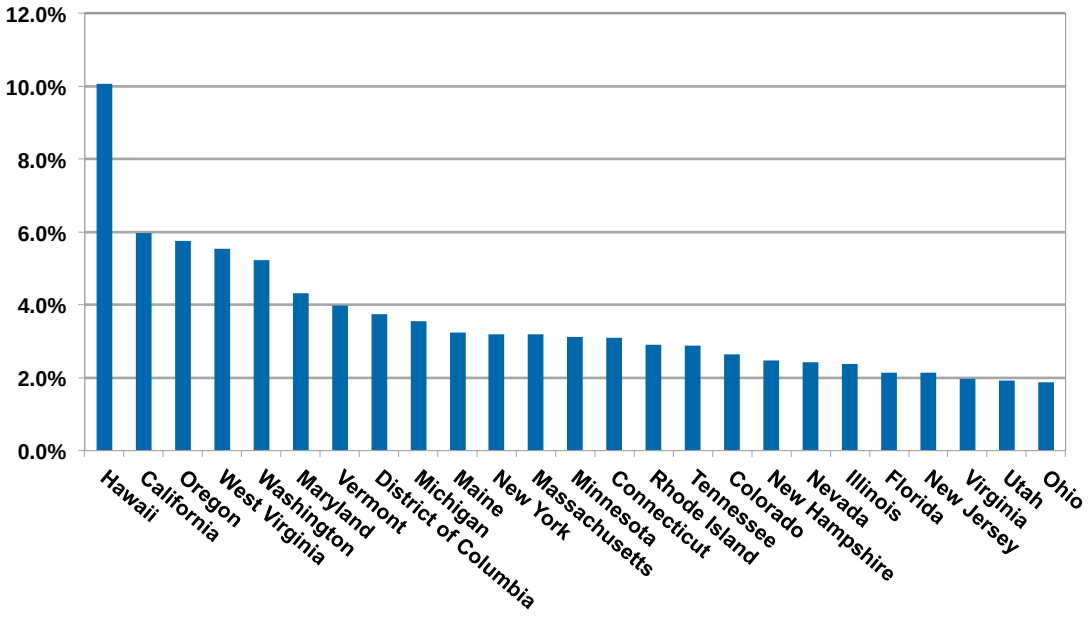
- Reinstitute financial incentive for PEV and EVSE purchase
- Expand EV carsharing programs with flexible locations
- Create marketing programs aimed at tourist EV rentals
- Increase percentage of allowable wind/solar
- Enable smart charging to balance renewables
- Promote solar installers and EVSE company partnerships

(Source: Navigant Research)

Hawaii Already a Leader in PEV Sales

- Percentage of new vehicles that are PEVs to grow from 2.7 to 10.1 between 2013 and 2022
- Annual sales of PEVs to grow from 1,200 to nearly 6,000

PEV Sales as a Percentage of Light Duty Vehicle Sales, Top 25 States: 2022



(Source: Navigant Research)

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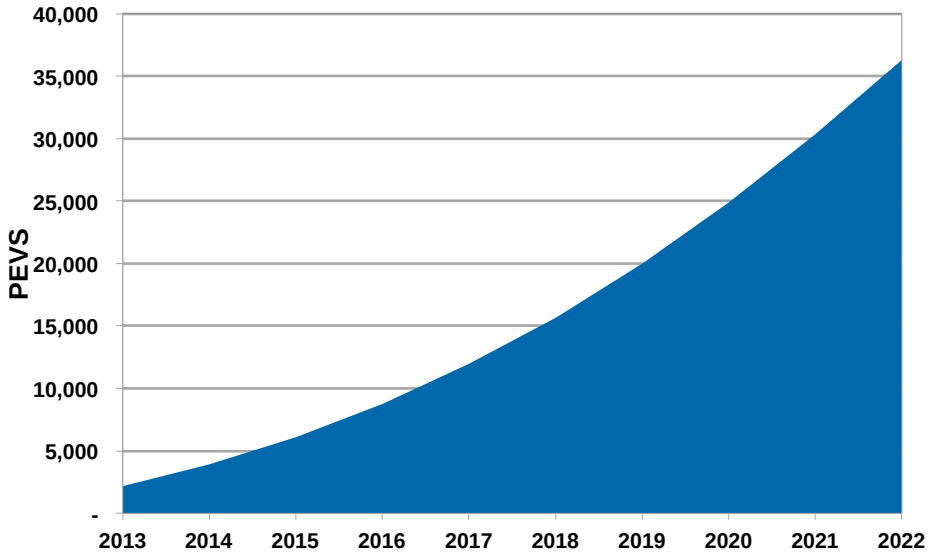
PEVs on the Road in Hawaii

» More than 36,000 PEVs will be sold between 2013-2022

Cumulative PEVs Sold in Hawaii, 2013-2022



(Source: Navigant Research)

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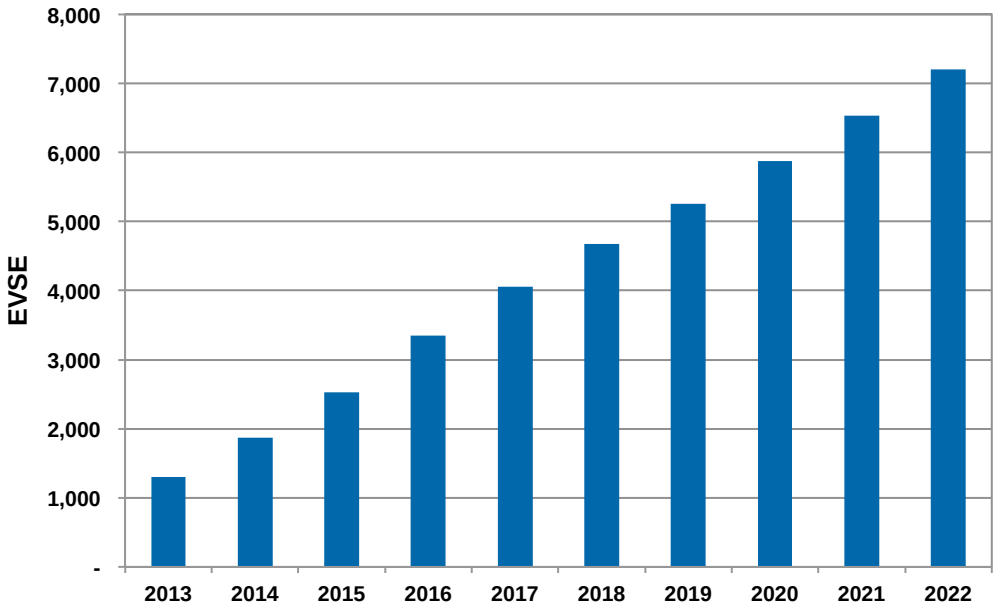
EV Charging Infrastructure

- More than 400 commercial EVSE currently installed, including private equipment
- 1,300 new installations in 2013, CAGR through 2022 is 20%

EVSE Sales in Hawaii, 2013-2022



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