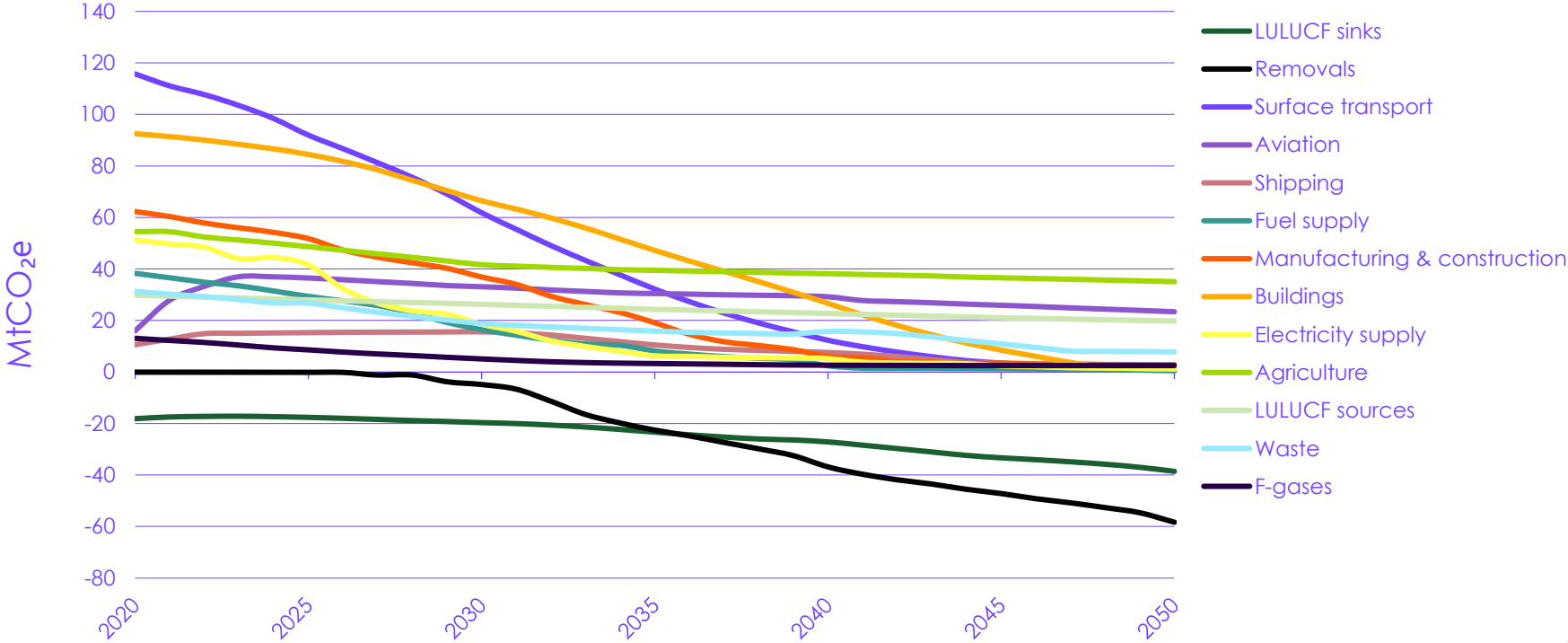


# Climate Change Committee

# The CCC outlook

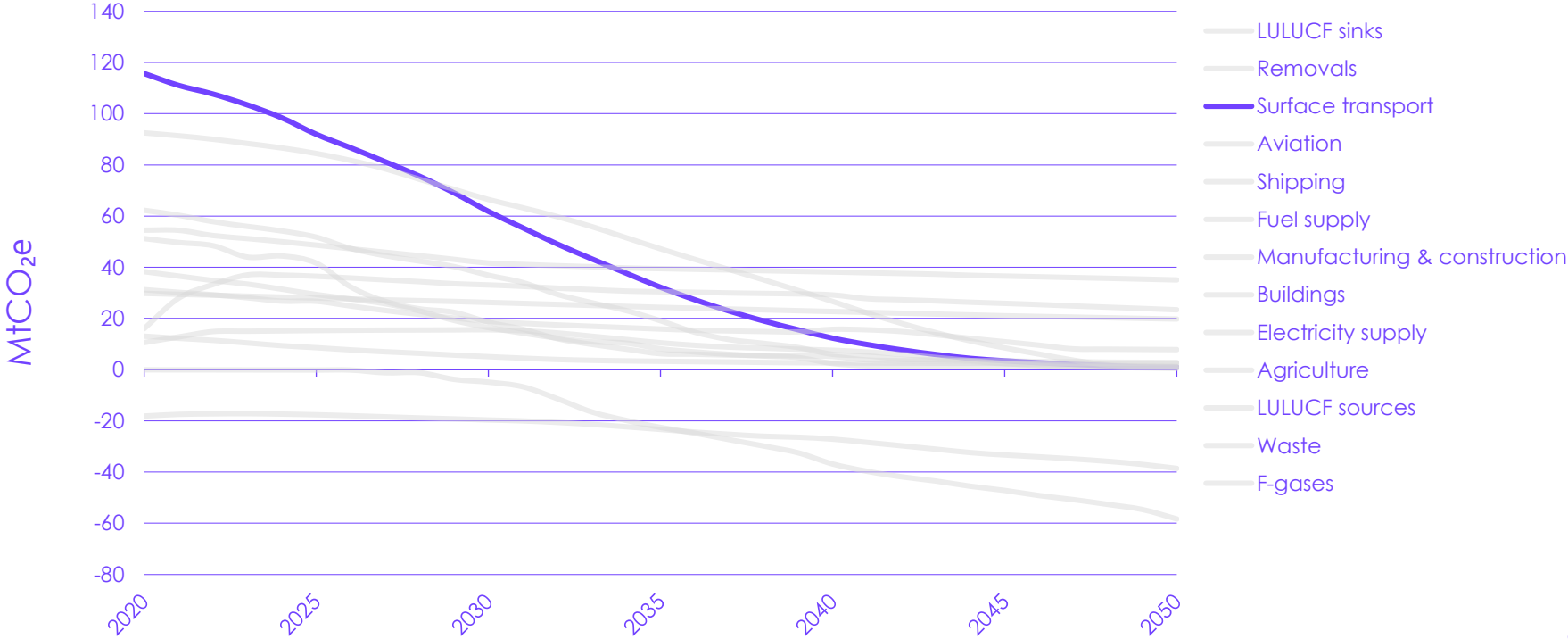
## Net Zero by 2050 is a cross-economy challenge



Source  
CCC analysis

# The CCC outlook

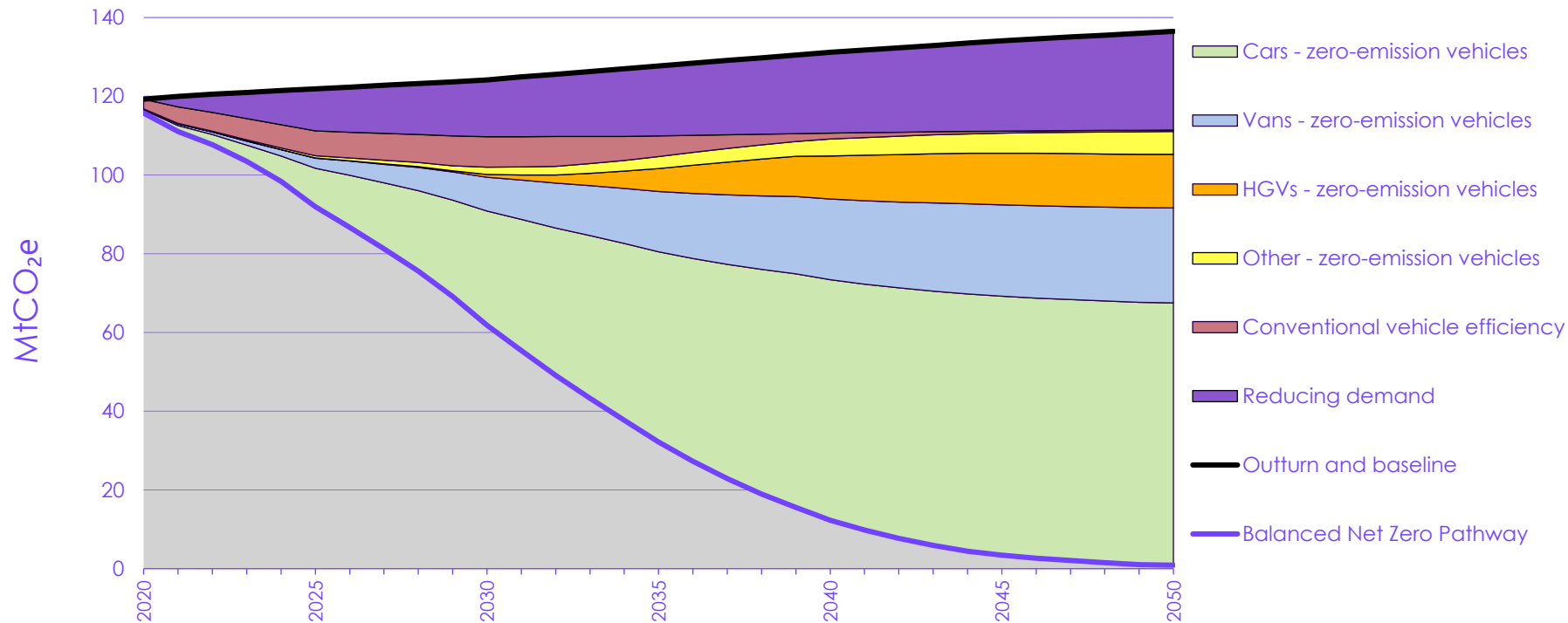
## Net Zero by 2050 is a cross-economy challenge



Source  
CCC analysis

# The CCC outlook

## The pathway for surface transport

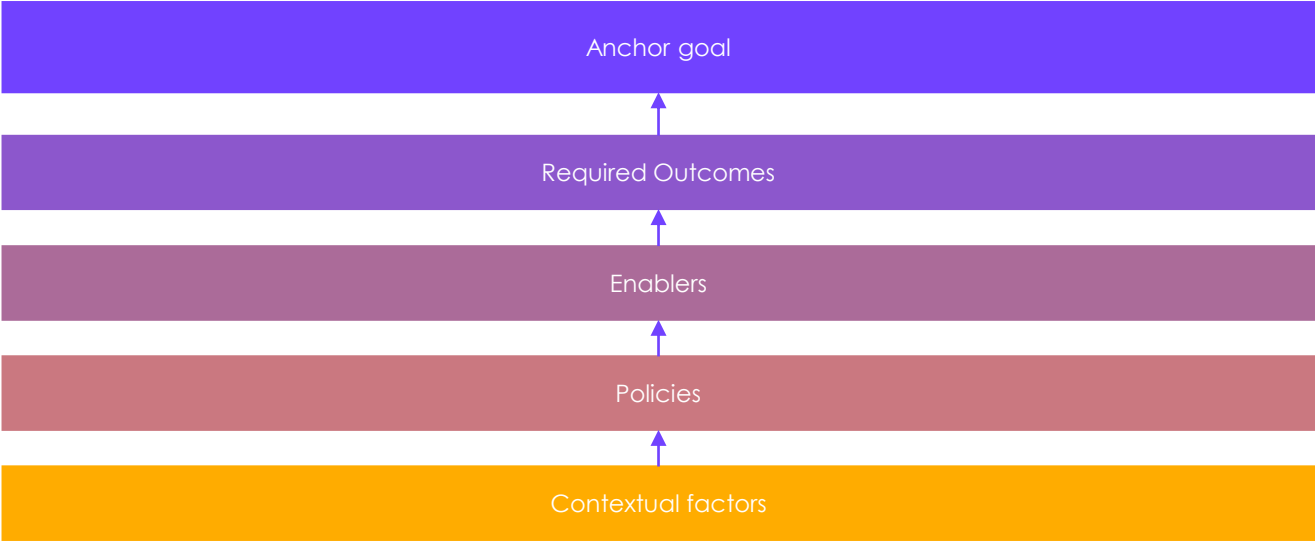


Source  
CCC analysis

# Real-world delivery

# Real-world delivery

## Monitoring progress



## Real-world delivery

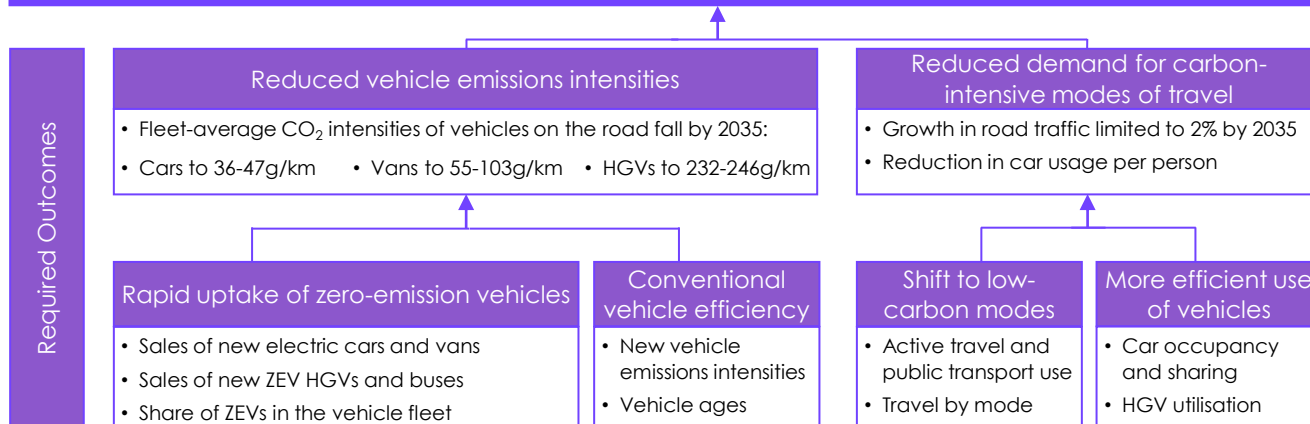
### Monitoring map example – Surface transport

Surface transport emissions to reduce by 75% by 2035 (relative to 2019)

# Real-world delivery

## Monitoring map example – Surface transport

Surface transport emissions to reduce by 75% by 2035 (relative to 2019)





# Real-world delivery

## Monitoring map example – Surface transport

Surface transport emissions to reduce by 75% by 2035 (relative to 2019)

Required Outcomes

Enablers

Robust supply of quality ZEVs

- Availability of ZEV models
- Used EV sales

Charging infrastructure

- Public charger number + spread
- Charger reliability

Use of biofuels

- Road transport biofuel usage

Competitive low-carbon modes

- Zero-carbon travel infrastructure
- Relative mode costs

Supportive tax and spending

- Relative transport investment
- Road network status

Public and business attitudes to ZEVs

- Public perceptions of EVs
- Public charging user experience

More resource-efficient vehicles

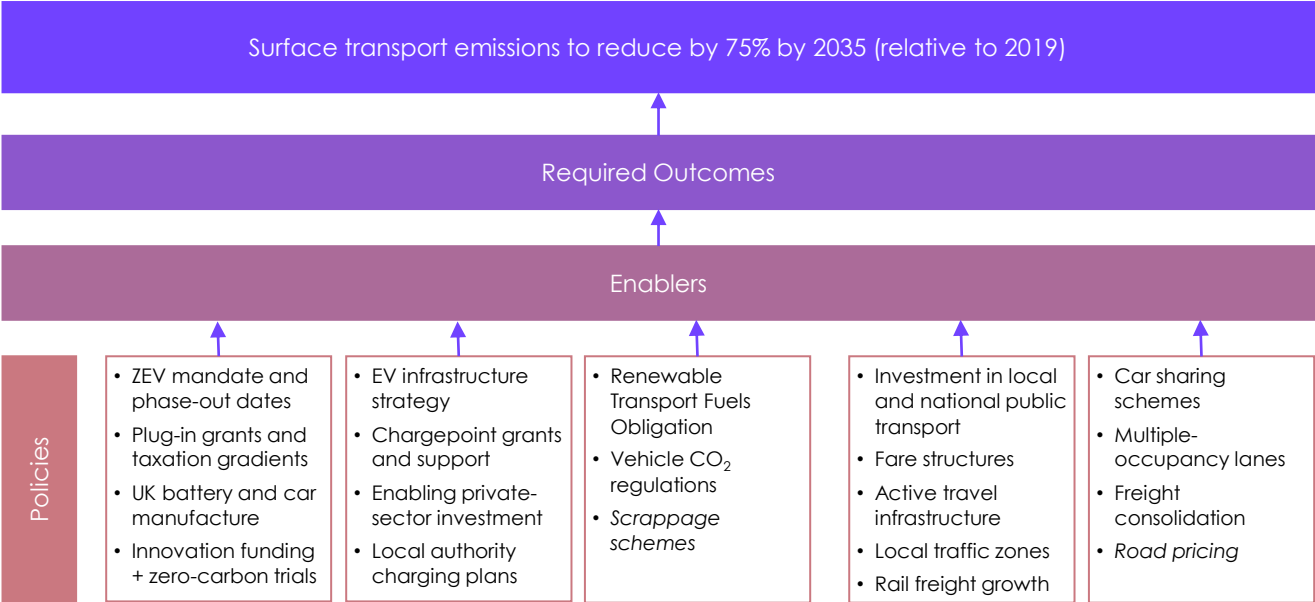
- Average car size
- EV battery capacities

Public willingness to travel more sustainably

- People choosing more sustainable modes
- Actions towards low-carbon travel

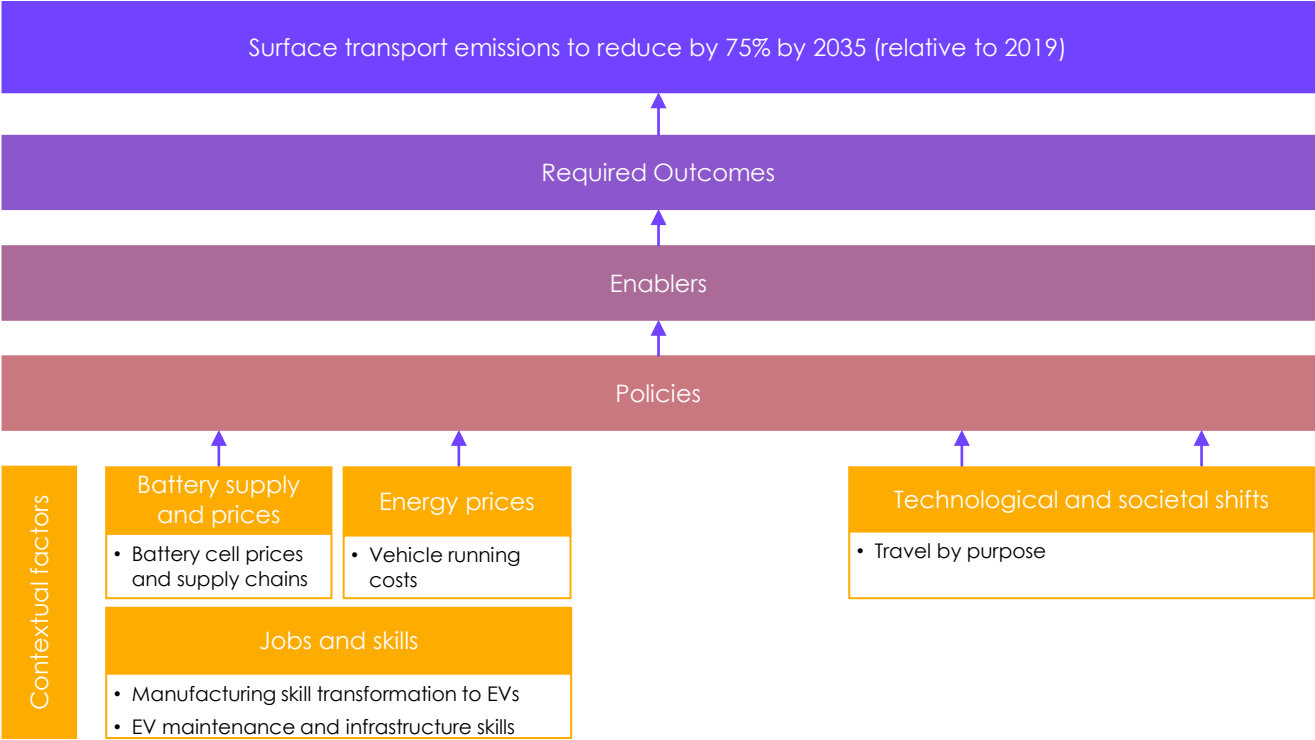
# Real-world delivery

## Monitoring map example – Surface transport



# Real-world delivery

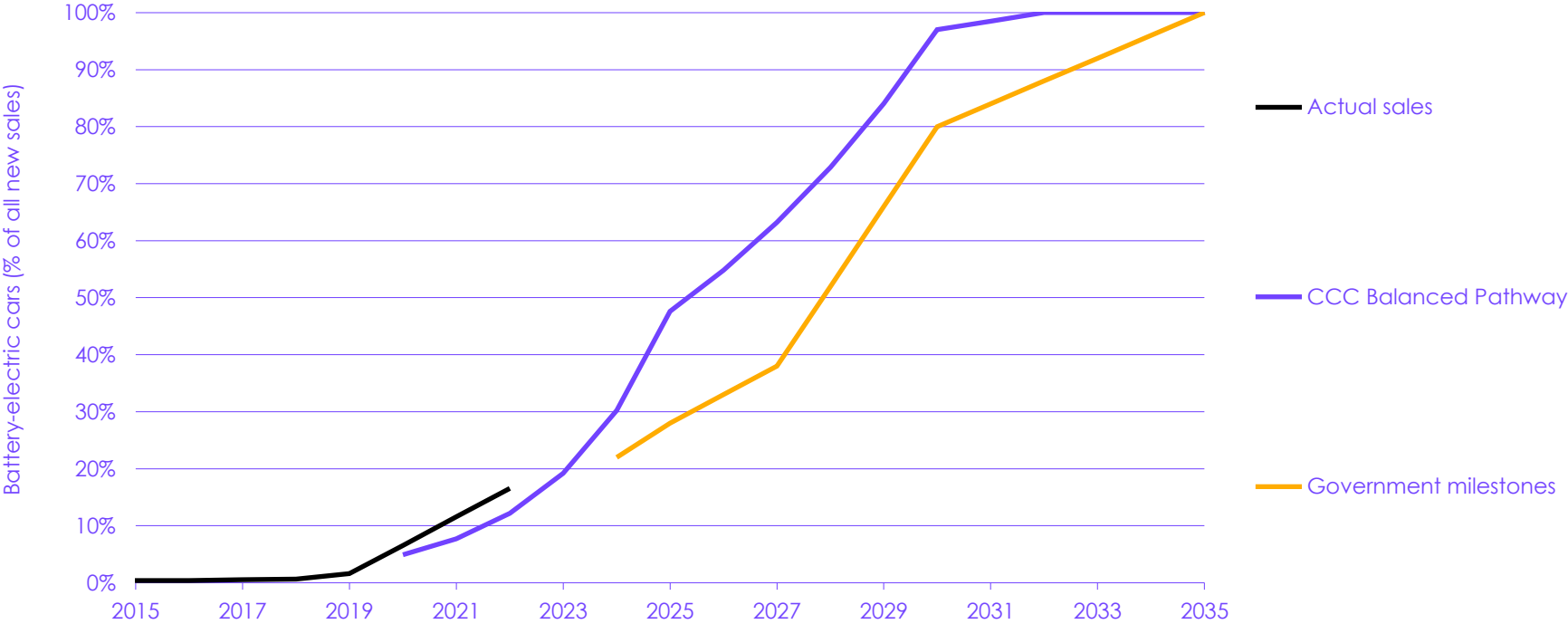
## Monitoring map example – Surface transport



# Are we seeing the change?

# Electric car sales

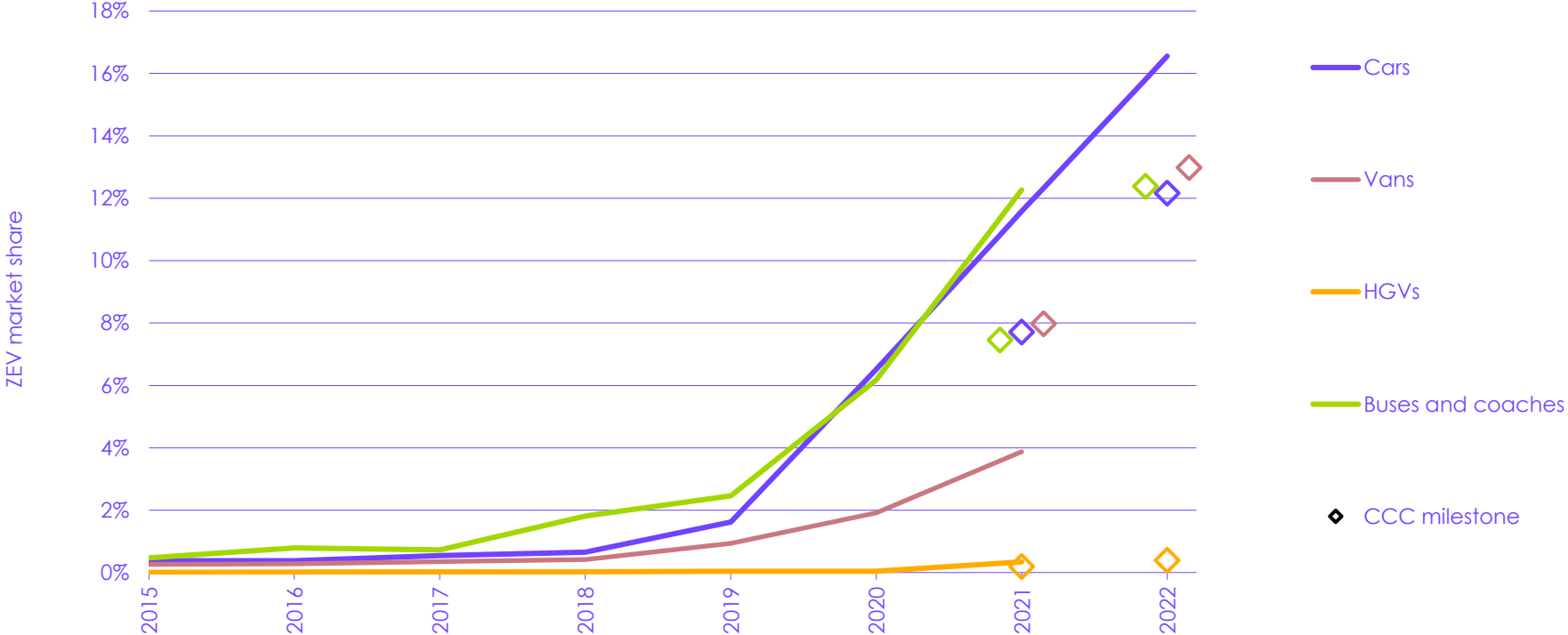
Market share ahead of expectations, but total volumes behind



Source  
CCC analysis

# All zero-emission vehicle sales

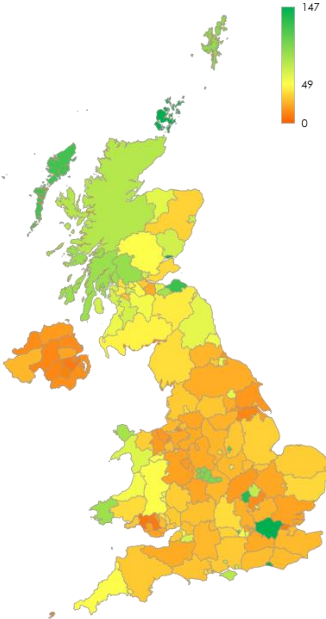
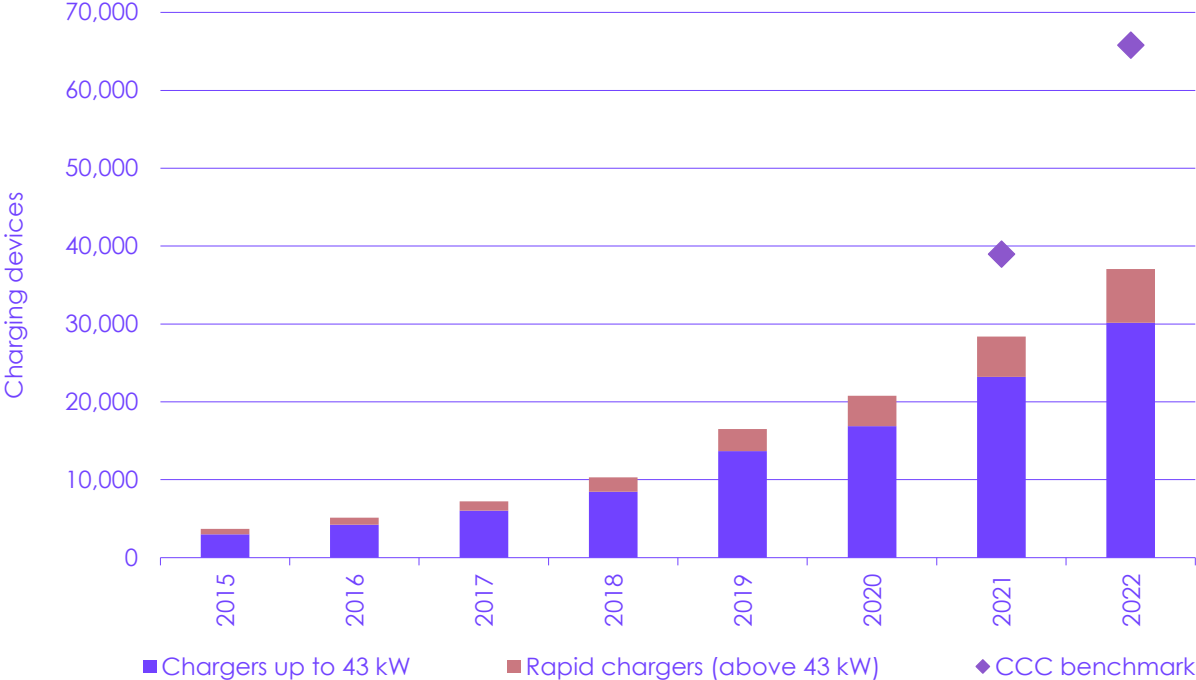
## Cars and buses tracking ahead of Balanced Pathway



Source  
CCC analysis

# EV chargepoints

Public chargepoint deployment is growing, but unequal and falling behind the pace needed



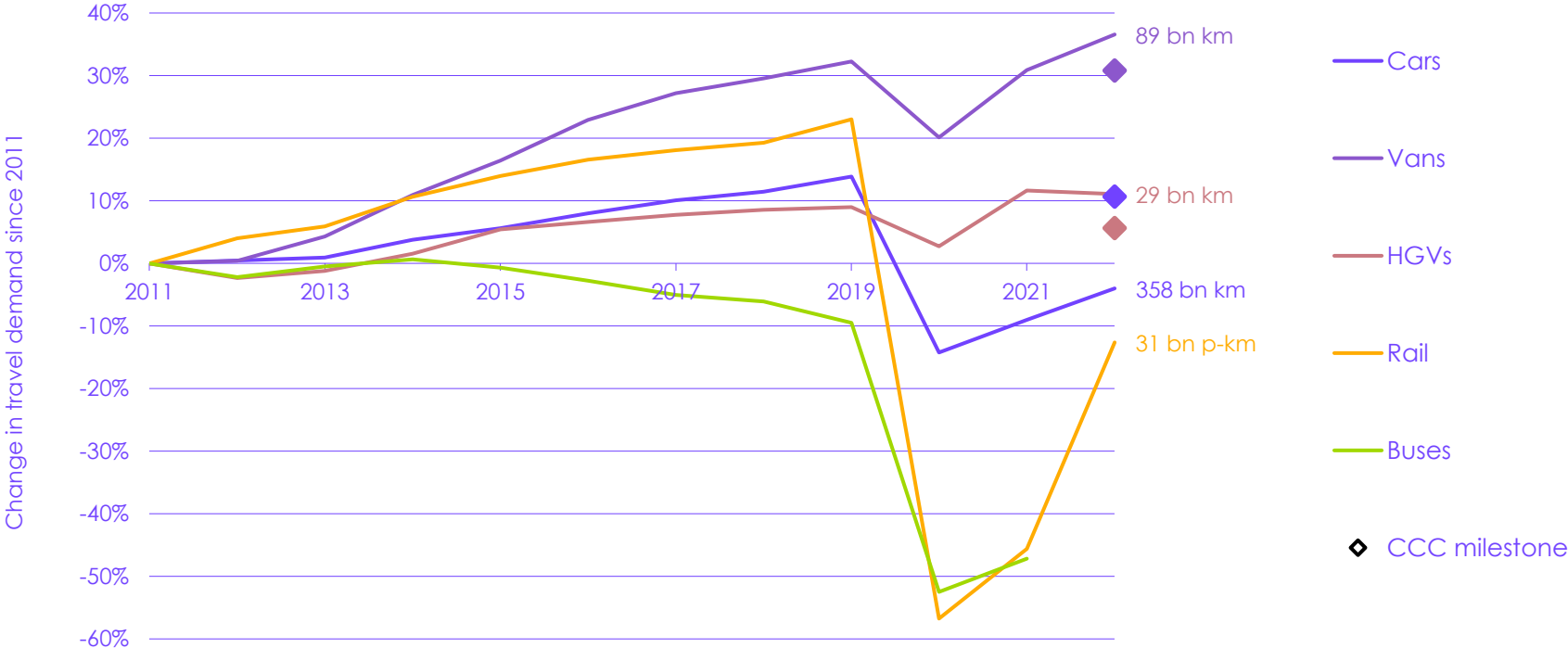
Source  
CCC analysis

# Going further

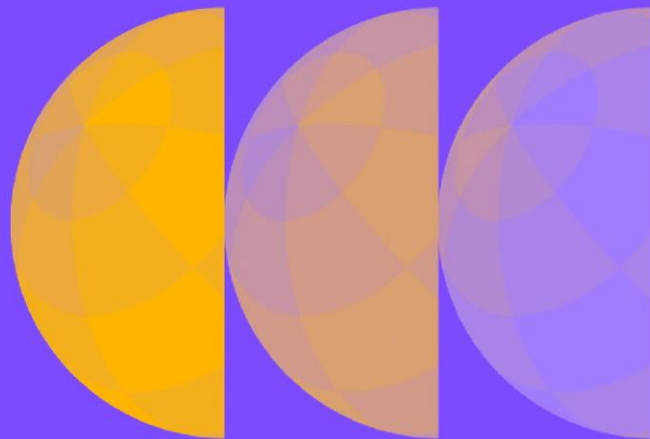


# Travel demand by mode

Long-term trends towards increased car, van, and HGV use



Source  
CCC analysis



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