

# 5-Min Monthly Read February 2025

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Welcome to the first edition of the MobilityNotes Premium Newsletter

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## Trump Effect on Transport Emissions

### CO2 Endangerment and California waivers at risk

- EPA Administrator Zeldin has recommended to the White House to scrap the 2009 GHG endangerment finding, which provides EPA with the legal basis for setting GHG limiting standards for vehicles and other sources such as power plants. If reversed, this is expected to be contested in courts.
- The Trump EPA is submitting waivers for several of California's emission standards to Congress. These include the light-duty Advanced Clean Cars II, the heavy-duty Advanced Clean Trucks (ACT) and Low NOx Omnibus standards. The Congressional Review Act (CRA) is explored to repeal these waivers, but there is uncertainty and possible litigation over the question of whether waivers are "rules" subject to CRA.

We have collected in one place a summary of the changes being considered or implemented by the new administration that could affect emission control standards, funding pathways and tariffs pertinent to the transportation sector.

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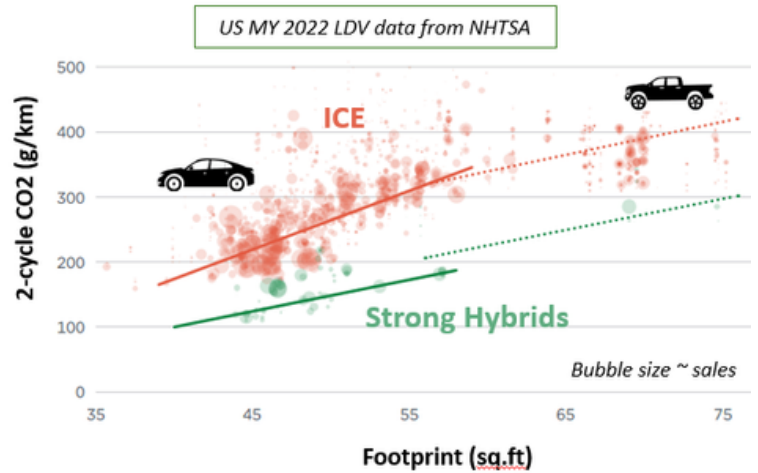
# Fuel Efficiency Improvements

## Light-Duty, Heavy-Duty and Off-Road Equipment

### Cost-Benefit Analysis of Hybrids

The International Council on Clean Transportation (ICCT) has analyzed the CO2 emission reductions and the cost of hybrid powertrains for light-duty passenger cars and pickups in the U.S.

It concludes that “strong hybrids provide a 30% reduction in tailpipe greenhouse gas (GHG) emissions at an average price premium of \$2,000, with average 10-year fuel cost savings of \$4,500. Future strong hybrids can provide an additional 15% reduction in GHG emissions at an average additional price premium of between \$300 and \$800.” Read [here](#) for more details.



### Volvo gives its trucks a (nose) lift

Volvo Trucks has recently [shown](#) that their new European “FH Aero with I-Save” has 5% lower fuel consumption through improved aerodynamics.

The key is a new design with the front extended by 24 cm to take advantage of a recent update to European regulations which allow for longer truck lengths. Read [here](#) for more details.



### Volvo announces Hybrid Excavator

Nope, hybrids are no longer limited to cars. Volvo has announced the addition of a hybrid excavator to their lineup of construction equipment.

The [EC260 hybrid](#) stores the boom down motion energy into the accumulator, to later drive the assist motor and in turn the engine system. The result is up to 17% increase in fuel efficiency.



# (Near-) Zero-Emission Technologies

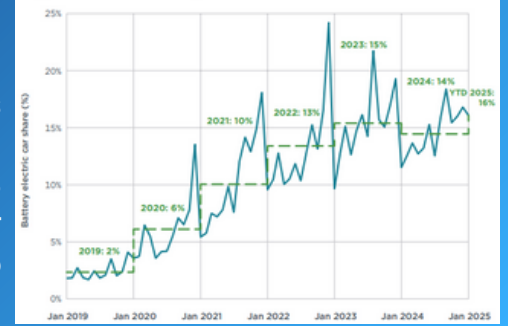
## Spotlight on European Light-Duty Market

With the upcoming 2025 CO2 targets, ICCT is publishing a monthly roundup of vehicle registrations, electric share and OEM CO2 emissions.

- In January 2025, EV share (combined BEV + PHEV) was 24%, while BEV share was 16%.
- Average CO2 emissions fell from 107 g/km in 2024 to 103 g/km in January. Several OEMs are complaint with their 2025 targets, while VW and Suzuki have a long way to go (17 and 13 g/km over compliance).

## Electrification, Hydrogen

Share of battery electric in new passenger car registrations in Europe



## Nikola and Hyzon end operations

EV truck manufacturer Nikola has filed for Chapter 11 bankruptcy protection and is looking to sell its business.

Hydrogen fuel cell truck manufacturer Hyzon has also run out of funds and is ending operations.

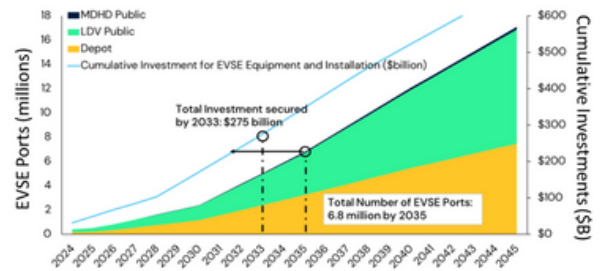


## Range extended electric - trucks ?

DHL has partnered with Scania to address the need for higher all electric range for trucks. The solution - an extended range EV (EREV), in which one of the battery packs is replaced by a gasoline-powered 120 kW generator. The main energy is delivered by 416 kWh batteries, while the generator helps to increase the range up to 800 km.

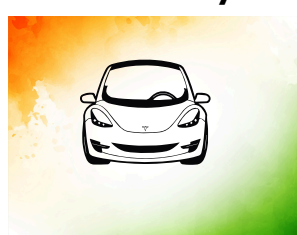
## Infrastructure assessment for ZEVs in US

A report from the Coordinating Research Council estimates the infrastructure required to support the ZEV share anticipated by current regulations. By 2035, to meet regulations, 35% of LD fleets and 17% of MDHD fleets will be ZEVs.



To support this, the number of charging ports must increase 35X (200,000 to 7 million), and H2 fueling stations must increase 10X (< 100 to > 1,000), compared to 2024. Electricity demand from the transportation sector will reach 608 TWh (>13% of total demand).

## Tesla finally coming to India ?



Tesla might be closer than ever to launching in the Indian market. The company has secured showrooms in select cities and plans to open these as early as April 2025.

The Indian Government has lowered import tariffs for luxury EVs, adjusting from 110% to 70% - and potentially further dropping it to 15% based on local manufacturing considerations.

A Model 3 costs ~ \$62K in India today, which would reduce to \$34K with the import tariff reductions to 15% bringing it in line with some of the other local EV offerings.

# Spotlight on Latin America

Guest Contribution from Raimundo Nóbrega



Around 5.6 million vehicles were sold last year in Latin America (major countries include Argentina, Brazil, Colombia, and Mexico)

**Mexico** is the leading vehicle manufacturer, and a significant part of the vehicles it manufactures annually are exported to the United States.

**Brazil** is the second-largest manufacturer and the largest vehicle sales market in Latin America and has seen continuous sales growth in recent years in production and sales -

- Toyota and Renault predict a 5% to 10% increase in sales in Brazil and Latin America in 2025 compared to 2024.
- Chinese OEMs are setting up shop: BYD and GMW are expected to start local manufacturing electric cars in Brazil in 2025, partially replacing their current imports.
- General Motors Brazil is making major investments in development and manufacturing to launch in the country its first hybrid-flex vehicles with ethanol, capable of running on 100% ethanol or gasoline along with their batteries.



*The best-selling electric car in 2024 in Brazil: BYD Dolphin Mini*

President Trump's tariffs on imports could change the outlook.

- S&P Global estimates that the US imported ~ 3.6 million, or 22% of all light vehicles sold in the US from Mexico or Canada. President Trump's 25% tariff would add \$6,250 on an average \$25,000 imported vehicle from these regions.
- The American Trucking Association estimates that a 25% tariff on Mexico could raise the price of Class 8 trucks by as much as \$35,000.

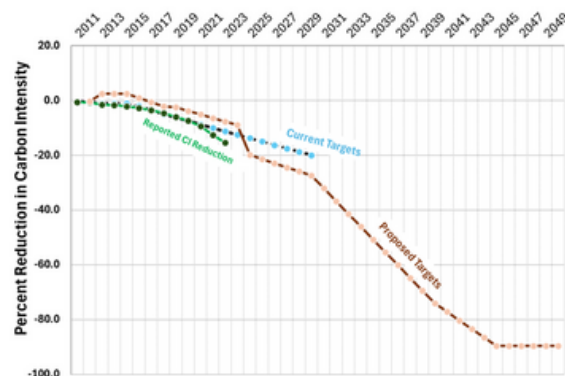


Latin America is also emerging as a leader in hydrogen, with the second largest volume of announced investments (USD 107 billion) and home to 20% of announced electrolyzer capacity through 2030 (70 GW).

## California LCFS amendments disapproved

In November 2024, the California Air Resources Board (CARB) approved amendments to the low carbon fuel standards (LCFS) regulation, which targets a 90% reduction in the carbon intensity of transportation fuels used in the state. The Office of Administrative Law (OAL) has issued a Notice of Disapproval of a Regulatory Action for these amendments.

CARB plans to address some inconsistencies cited in the notice and resubmit the amendments.



## Companies scaling back renewable energy targets

- BP is likely to drop its target of renewable generation capacity 20-fold between 2019 and 2030 to 50 GW, and increase fossil fuel production.
- Equinor (previously Statoil) has cut its target of clean power capacity from previous 12 - 16 GW to now 10 - 12 GW by 2030, while increasing oil production target.
- Shell, has recorded a loss of half a billion dollars on its renewables and energy solutions business. It has written down its US wind farms by \$996M and will not build any new offshore wind farms. In India, however, it plans to add another gigawatt of renewable energy since there the requirement is to add capacity and not displace fossil fuels.



## CONFERENCES / UPCOMING EVENTS

TMC's Annual Meeting & Transportation Technology Exhibition, March 10 – 13, Nashville  
<https://tmcannual.trucking.org/>

Hydrogen for Sustainable Mobility Forum, March 11 – 12, Politecnico di Torino  
<https://www.eventleaf.com/e/H2SMForum2025>

On-Board Diagnostics Symposium-Europe, March 11 – 13, Porto, Portugal  
<https://www.sae.org/attend/obd-europe>

International Battery Seminar & Exhibit, March 17 – 20, Orlando, FL  
<https://www.internationalbatteryseminar.com/>

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