

How to Talk About Electric Vehicles

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For most Americans, the mention of EVs conjures images of protected forests, composting, recycling, maybe a few affluent families who can afford to upgrade to a Tesla.

That's a huge problem. These associations have allowed the far right to seize on EVs as a symbol for out-of-touch liberals trying to force a political agenda on working class families. They've become a cultural issue. And by continuing to present the benefits of EVs as exclusively environmental, the left is feeding that argument.

Two Options: American EVs or No American Auto Industry

Electric vehicles are a powerful tool to reduce emissions. But with EVs representing a growing share of cars sold in the US (more than 5% of all new cars sold in the fourth quarter of '22 were

EVs) and around the world (14% of all new cars sold globally in '22), it's clear that EVs aren't just a climate mitigation tool. They're also the future of auto manufacturing.

The only question is whether the US will be a manufacturer of the world's electric vehicles or a consumer of EVs made abroad.

To us, the answer is simple. If EVs are the future, that future should be made in America. And, for the wellbeing of American manufacturing, it has to be.

The auto industry is worth over \$750 billion in the US alone. It accounts for over 4 million jobs. For every auto plant job, there are 10 more created in the supplier industry, in retail businesses, and beyond. China, however, is off to an early lead when it comes to EVs. Over 60% of global EV sales were in China last year. China produced about 6 million EV passenger cars in 2022 (including plug-in hybrids) and exported 830,000 EVs to several European countries, Russia, Mexico, Saudi Arabia, and several other destinations.

China has a vast auto industry, with hundreds of auto plants and over 5 million jobs (2019 latest) across domestic auto manufacturing. 22% of Chinese domestic auto sales were electric in 2022 and they control 75% of cell manufacturing and 90% of anode and electrolyte production. That's a massive market share that, if the US simply gives up, China will maintain and expand in the coming years.

Too many Americans believe EVs are being forced on them by politicians and activists because they are environmentally virtuous. We need to change the narrative from one focused on consuming EVs to one organized around manufacturing them. This isn't just about the climate. It's about preserving an essential manufacturing sector and the millions of jobs it creates across the United States.

That means diving headfirst into EV manufacturing, whether we like it or not.

How to Sell It

For communicators hoping to sell the benefits of EV manufacturing in the US, a few ground rules below.

The core message here is that America is investing in EV manufacturing because, as global auto sales indicate, EVs are the future, and we will not get left behind.

DO: Stress the investments China and other foreign competitors have made in the EV and clean energy supply chains. Americans need to understand that if we fail to invest in and develop these sectors of our economy, we will be non-competitive and isolated from peer nations.

DO: Highlight the importance of protecting legacy American auto companies and how EV manufacturing is critical to their longevity.

DO: Praise the work of American autoworkers. They've faced uphill battles before (the rise of Japanese automakers and the subsequent arrival of Korean automakers, the 2008 financial crisis) and they've triumphed, continuing to make some of the best cars in the world. To suggest they can't rise to the occasion and lead the world's EV production, is bogus.

Bottom Line: Make the choice clear. We can either do the hard work necessary to develop a union-led EV manufacturing sector here in the US or we can stand on the sidelines and watch as the US loses billions in revenue and millions of jobs while China takes the lead.

Added Background

Right now, thanks to massive Chinese government subsidies, China is dominating the EV supply chain, holding a more than 50% market share. But their lead isn't permanent.

There are over 1 billion internal combustion engine vehicles on the road worldwide. Converting that fleet from ICEs to EVs is not something any single nation—let alone one with a workforce that is declining, a hobbled capital market, and a currency no one trusts—can do alone. The United States, by contrast, has robust capital markets, a motivated private sector, and a long and profitable track record making vehicles that Americans want to buy. US companies are leaders in downstream EV supply chain segments, including software, safety features, and outstanding new features that are fast becoming a hit at this very early stage of the EV transition.

China may lead the pack today, but their position is not durable. The United States, by contrast, is on the come-up, well-positioned to lead the EV acceleration globally and develop new and industries here and in export markets. US automakers and suppliers have over 100 years of experience and there no question that they will fight to grow their leadership in the EV segment.

Becoming competitive will require a coordinated approach, a high-quality workforce, and a government willing to do what it takes to support US auto companies and their workers as they push to lead the EV transition. But if recent trends are any indication, we're already well on our way.

The *Inflation Reduction Act*, the *Infrastructure, Investment, and Jobs Act*, and the *CHIPS and Science Act* all took an approach rooted in industrial strategy, designed to support and kick start innovation in the private sector. And it's working:

- In the 24 months since battery production incentives went into effect, we went from virtually no battery cell manufacturing to a fast-growing industry, with new domestic projects announced almost weekly.

- In the past three years, we have *quintupled* capacity projections for battery cell manufacturing, from 100GW to 500GW. That's an unprecedented leap.
- As of September 26th, the US has seen about \$139 billion in investments in EVs and batteries.
- And construction of manufacturing plants reached an unprecedented record spending level of \$200 billion in July.

This is only the beginning of what can—and should—be a coordinated approach to advancing US leadership in electric vehicles and clean energy. Despite what naysayers like JD Vance would have you believe, America can, will, and is already on the road to competing with China in the EV marketplace. Now is not the time to turn tail and give up. It's time to double down.

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