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Publication Date
2009-08-01
Are batteries ready for plug-in hybrid buyers?

October 6, 2008

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Abstract

The notion persists that battery technology and cost remain as barriers to commercialization of electric-drive passenger vehicles. Within the context of starting a market for plug-in hybrid electric vehicles (PHEVs), we explore two aspects of the purported problem: 1) PHEV performance goals and 2) the abilities of present and near-term battery chemistries to meet the resulting technological requirements. We summarize evidence stating that battery technologies do not meet the requirements that flow from three sets of influential PHEV goals due to inherent tradeoffs among power, energy, longevity, cost, and safety. However, we also show that part of this battery problem is the overly ambitious PHEV performance goals thought to be necessary to meet consumer priorities. We elicited PHEV designs from potential early buyers among U.S. new car buyers; most of those who are interested in a PHEV are interested in less technologically advanced PHEVs than assumed by experts. Using respondents’ PHEV designs, we derive peak power density and energy density requirements and show that current battery chemistries can meet them. By assuming too aggressive PHEV goals, existing policy initiatives, battery research, and vehicle development programs mischaracterize the batteries needed to start commercializing PHEVs. To answer the question whether batteries are ready for PHEVs, we must first answer the question, “whose PHEVs?”
1. Introduction

In this paper we examine what we call the battery problem: the contention that battery technology is not sufficiently advanced to allow the commercial success of electric-drive vehicles. We investigate the specific case of plug-in hybrid electric vehicles (PHEVs). For instance, Anderman (2008) states that the battery chemistries being developed for PHEV applications are “not ready for commercial introduction” due to limitations in performance, reliability, longevity, safety, and cost—presenting an overall “tremendous” business risk to potential PHEV manufacturers. We contend that potential solutions to the battery problem are not just a matter of technology development and cost reduction, but instead involve a concurrence between battery technology and appropriate PHEV performance goals. The present analysis explores both, with a particular emphasis on the latter—challenging untested assumptions regarding consumer valuation of PHEV capabilities.

1.1. Efforts to start plugging in

Why should transportation and energy policy makers, automobile manufacturers, the electricity industry, and consumers be concerned about the battery problem in general, and the case of PHEVs in particular? Spurred by petroleum supply and price disruptions, air pollution policy, and climate change policy, much effort and many resources have been devoted to the development of electric drive vehicles over the past three decades. In the United States, the federal government initiated efforts to develop alternatives to petroleum-based fuels for transportation in the late 1970s and early 1980s, including the Hybrid and Electric Vehicle Act of 1976. Such actions laid the ground work for the battery, motor, and power and control electronics technologies that emerged during the 1990s (Turrentine and Kurani, 1995). Battery electric vehicles (EVs) garnered renewed attention in the 1990s, stimulated by General Motor’s development of the EV-1 (aka Impact) and California’s Zero
Emissions Vehicle (ZEV) mandate. However, after years of further technology development and policy debate, policymakers were convinced by automobile manufacturers in the late 1990s that battery technology was insufficient to meet manufacturers’ EV performance goals. Some battery technologies later proved successful in less demanding hybrid electric vehicles (HEVs).

Presently, interest has turned to plug-in hybrid electric vehicles (PHEVs). In response to the U.S. President’s 2006 State of the Union address, the U.S. Department of Energy has published a working draft of a PHEV R&D Plan (USDOE, 2007). In California, the Air Resources Board amended the ZEV mandate in March 2008 to provide incentives for automakers to produce and sell PHEVs (CARB, 2008).

Relative to other electric-drive and conventional gasoline or diesel vehicles, one advantage of PHEVs is fuel flexibility. A PHEV user could power their vehicle with electricity from the electrical power grid, gasoline (or another liquid fuel), or both. To do so, a PHEV has both an electric motor and a heat engine—usually an internal combustion engine (ICE). However, this flexibility complicates vehicle designs and possible ways of using energy from two different systems, i.e., it is complex but necessary to specify exactly what type of PHEV one is discussing.

Fuel flexibility also complicates efforts to quantify potential PHEV benefits. Studies to date rely on assumptions about vehicle designs, consumer values, driving and recharge behaviors, and the future electricity grid. Focusing on the household market for motor vehicles, researchers estimate that PHEV use could halve petroleum use (Gondor et al. 2007; Axsen and Kurani, 2008) and reduce GHG emissions by 32 percent (Samaras and Meisterling, 2008) to 65 percent (Duvall et al. 2007) relative to conventional vehicles. Across a wide variety of assumptions, including PHEV performance levels, prior research concludes

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1 As the ICE in most conventional vehicles is fueled with gasoline (or diesel), in the discussion that follows we will refer to gasoline without precluding the possibility of different future fuels.
that PHEVs could contribute to air quality, climate change, and energy security goals. But such analyses do not consider which designs PHEV buyers would want, or what design goals should be set. For their part, policymakers are unsure how to regulate PHEV emissions and fuel use and potentially incentivize commercialization under conditions of such technical, behavioral, and market uncertainty.

1.2. PHEV design concepts

To reexamine PHEV performance goals, four important design concepts must first be clarified.\(^2\)\(^3\) First, a PHEV operates by either depleting (CD) or sustaining (CS) the state of charge (SOC) of its battery as illustrated in Figure 1. For some distance a charged PHEV is driven in CD mode, gradually discharging the battery. Once the battery is depleted to a design minimum level, the vehicle switches to CS mode. To maintain battery life, only a portion of the battery’s total energy capacity is used—known as the usable depth of discharge (DOD). In CS mode the battery’s SOC is sustained by relying primarily on the gasoline engine, using the battery and electric motor to increase the efficiency of the gasoline engine and recapture kinetic energy during coasting and braking, as is now done in HEVs. The distance a fully charged PHEV can travel in CD mode before switching to CS mode is called CD range.

\(^2\) These and other PHEV design issues are further described in Axsen et al. (2008).

\(^3\) We distinguish between PHEV goals—the desired performance level of the vehicle—and PHEV battery requirements—the estimated technical battery specifications required to achieve the stated goals that will be addressed in a later section.
Second, a PHEV can be designed for either all-electric (AE) or blended (B) operation over its CD range. AE operation uses only electricity from the battery; the engine is not used at all even when high power is demanded. In contrast, B operation uses electricity and gasoline to power the vehicle during the CD range, thus requiring a battery that need deliver less power.

Third, PHEV designs are commonly described according to CD range; the common notation is PHEV-\(X\), where \(X\) is the CD range in miles.\(^4\) However, this notation does not distinguish whether a PHEV operates as AE or B. Comparisons of PHEVs, even those sharing the same PHEV-\(X\) designation, must reconcile assumptions regarding CD operation. Further, Kurani et al. (2007) discuss how additional confusion may result from two differing definitions of \(X\): (1) as the equivalent number of miles of petroleum displaced by electricity from the battery (Gondor and Simpson, 2007), and (2) as the miles that can be driven before

\(^4\) To remain consistent with most of the PHEV literature cited in this paper and the PHEV design space presented to the American respondents to our survey, we report CD range and other distance-related measures in miles, where 1 mile = ~1.61 kilometers.
the gasoline engine turns on for the first time, also known as all-electric or zero-emissions range (CARB, 2003). In this article, we identify CD range and operation with the following notation: AE-X or B-X, where X is the CD range in miles.

Fourth, CD performance depends on the assumed drive cycle—a pattern of varying accelerations, speeds, and braking over a specified time used to test fuel economy and battery performance. A drive cycle is usually made up of one or more schedules. In the United States, the U.S. Environmental Protection Agency (EPA) has designed such schedules as the Urban Dynamometer Driving Schedule (UDDS), federal highway schedule (HWFET), and the US06 schedule. Kromer and Heywood (2007) criticize both the UDDS and HWFET as not accurately representing on-road driving, arguing for the use of the more aggressive US06. PHEV battery requirements based on schedules less aggressive than actual driving will overestimate the CD range and gasoline displacement of a given PHEV.

1.3. Rethinking PHEV goals

The PHEV goals set forth by government, industry, and academic sources include the following. The USDOE’s (2007) draft PHEV R&D Plan sets a mid-term (2012 to 2016) goal of commercializing PHEVs with the capability of AE-20 range and/or B-40 range, progressing towards long-term (2016 to 2020) commercialization of PHEVs with AE-40 range and/or B-60 range. Different PHEV designs are assumed by the United States Advanced Battery Consortium (USABC) (as described in Pesaran et al., 2007), the Massachusetts Institute of Technology (MIT) (as described in Kromer and Heywood, 2007), and the Electric Power Research Institute (EPRI) (as described in Graham et al. 2001) to calculate PHEV battery performance requirements. These three sets of PHEV goals are summarized in Table 1 and further explored in this paper.
Table 1: Comparing PHEV performance goals and the UC Davis PHEV design space

<table>
<thead>
<tr>
<th>Performance goals</th>
<th>Design space</th>
</tr>
</thead>
<tbody>
<tr>
<td>Units</td>
<td>USABC(^a)</td>
</tr>
<tr>
<td>CD range (miles)</td>
<td>10</td>
</tr>
<tr>
<td>CD operation(^e)</td>
<td>type</td>
</tr>
<tr>
<td>Body type</td>
<td>type</td>
</tr>
<tr>
<td>Electricity use (kWh/mile)</td>
<td>0.42</td>
</tr>
<tr>
<td>Depth of discharge</td>
<td>percent</td>
</tr>
<tr>
<td>Drive schedule</td>
<td>type</td>
</tr>
<tr>
<td>Battery mass (kg)</td>
<td>60</td>
</tr>
<tr>
<td>Vehicle mass (kg)</td>
<td>1950</td>
</tr>
</tbody>
</table>

\(^a\) As summarized in Pesaren et al. (2007).
\(^b\) As summarized in Kromer and Heywood (2007).
\(^c\) As summarized in Graham et al. (2001).
\(^d\) Range of potential goals representing a range of feasible near-term PHEV designs presented to respondents in a nationally representative sample of U.S. new car buyers.
\(^e\) Blended (B) or all-electric (AE) operation.
\(^f\) Grid electricity only—equivalent to total available energy capacity divided by CD range. The range of levels in the UCD design space depends on vehicle type and the type of CD operation.
\(^g\) UCD battery mass set to correspond with CD range, i.e. 60 kg for 10 miles of CD range, 80 kg for 20 miles, and 120 kg for 40 miles.
\(^h\) UCD vehicle mass values set to correspond with Graham et al.’s (2001) midsize car and Duvall et al.’s (2002) midsize SUV.

In this paper, we examine whether part of the battery problem is these assumed PHEV performance levels (goals) and the resulting battery requirements. Without contesting whether PHEVs with AE operation and long CD range will eventually be commercialized, we question whether it is necessary to wait for these PHEV designs in order to start commercializing any PHEVs, and therefore whether other PHEV designs (and their batteries) should be the object of technology development, marketing, and policy. We will show that
the battery problem—as many observers describe it—is the product of inadequate attention to a logically prior question: What PHEVs will people buy?

To develop an alternative perspective on the battery problem for PHEVs, we discuss in turn, and then integrate, information from three sources:

1. The three sets of influential PHEV battery goals and requirements introduced above.
2. Consumers’ PHEV design priorities as elicited through a large-sample U.S. survey of new car-buying households in December 2007.
3. The current state of battery chemistries, including nickel-metal hydride (NiMH) and several lithium-ion (Li-ion) batteries, and their potential development trajectories.

The next section compares the PHEV performance goals stated by the USABC, MIT and EPRI to the consumer-based approach applied here. Section 3 discusses the battery requirements derived from these four different goals. Section 4 summarizes the abilities of battery chemistries to meet such requirements. Section 5 summarizes by reevaluating the battery problem in light of consumers’ elicited PHEV design priorities and concludes with policy implications.

2. Comparing PHEV performance goals

2.1. Current goals

The USABC goals in Table 1, as summarized by Pesaran et al. (2007), are the more recent and among the most influential. The USABC specifies two PHEV designs from which it derives its battery requirements: an AE-10 crossover SUV and an AE-40 mid-size car. These goals follow CARB’s (2003) definition of CD range: the number of miles the vehicle can drive in AE mode during the UDDS drive cycle before the gasoline engine turns on.

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5 The USABC is a partnership between the US Department of Energy (DOE) and US automobile companies.
To illustrate the effects of different PHEV performance goals on battery requirements, we also present analyses performed by MIT and EPRI. MIT’s goals as taken from Kromer and Heywood (2007), whose vehicle assumptions differed from USABC’s in two important ways: (1) their PHEV is a B-30 mid-size car, and (2) their driving simulations used the UDDS, HWFET, and US06 driving schedules. EPRI’s goals are taken from Graham et al. (2001), who assumed PHEVs that are AE-20 and AE-60, both mid-size cars. A further distinguishing factor is EPRI’s higher assumed battery weights (159 and 302 kg, respectively) than USABC’s (60 and 120 kg) and MIT’s (60 kg).  

2.2. Towards consumer-informed goals: which PHEVs would PHEV buyers want?  

We now turn to the question: are these the right goals? Underlying these goals are assumptions about performance on the four PHEV design concepts discussed in Section 1.2. Do the PHEV designs assumed by experts match those that interest consumers? To explore this question, we did not assume one or two specific PHEVs. Rather, we created a PHEV design space in which consumers could create their own designs and thus set their own PHEV goals. This design space is summarized in Table 1. The design parameters available to respondents included CD operation—AE or three levels of B operation—and CD ranges of 10, 20 or 40 miles of CD range (the latter options correspond to a 60, 80 or 120 kg battery, respectively).  

This PHEV design space was presented to a sample of 2,373 new vehicle-buying households in the U.S. (See Axsen and Kurani (2008) for details.) The sample was assessed

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6 EPRI assumed a heavier battery because the most likely chemistry for use in a PHEV in 2001 when their report was written, i.e. NiMH, has much lower energy and peak power density than today’s more likely prospects, i.e. Li-ion.

7 EPRI did conduct consumer research as part of their PHEV research program. However, their respondents were only asked to respond to the same two PHEVs that EPRI used to calculate their battery requirements, i.e., an AE-20 and AE-60.

8 The design space also included dimensions of recharge speed and CS fuel economy. However, this study only focuses on CD operation and range. See Axsen and Kurani (2008) for a complete description of the PHEV design space.
to be representative of the target population—with distributions of age, income, housing type
and other demographic variables matching those of relevant subsamples drawn from the U.S.
Census, Current Population Survey, and the National Household Travel Survey. Respondents
completed a multi-part questionnaire over the course of several days:

- Part 1 was an on-line questionnaire asking about vehicle ownership, gasoline and
electricity expenditures, alternative fuel and electric-drive technology awareness
and knowledge, environmental beliefs, and household composition.
- Part 2 was a 24-hour diary of driving and vehicle recharging potential by time of
day and parking location as identified by the respondents.
- Part 3 was also an on-line questionnaire in which we elicited PHEV designs
through a series of design games.

To prepare them for the design games, respondents were provided two types of
preparatory information: (1) their 24-hour diary exercise served the additional role of
reflecting to respondents aspects of their daily travel and potential access to recharging
locations, and (2) an 8-page PHEV buyers’ guide describing basic design options for PHEVs.
Respondents then completed two design games. The first was the PHEV Development
Priority game in which they created PHEV designs over several iterations. The second was
the Purchase Design game which was framed in the context of a future vehicle purchase by
the household. Information was elicited about any expectations the household may have of
price, make, and model of the next new vehicle they would likely buy. Respondents were
then presented with this anticipated conventional vehicle, a PHEV version of it offered at a
higher price, and the option to upgrade the proffered PHEV at still higher prices.

The base PHEV design offered to respondents in the Purchase Design game was
described (in relatively non-technical language) as requiring up to 8 hours to completely
recharge, providing 10 miles CD range in blended operation (B-10) to achieve 75 miles per
gallon (mpg), and improving fuel economy in CS mode by 10 mpg over the conventional ICE vehicle they were considering for purchase. Additional upgrades to each of these performance parameters—recharge time, CD range, CD operation (blended or all-electric), and CS fuel economy—were available at higher prices (Table 2). For instance, a new conventional car could be upgraded to the base PHEV model for $3,000. Alternatively, it could be further upgraded, say, to an AE-20 for a total premium of $9,000. PHEV and upgrade prices are comparable to estimates from Markel et al. (2006) and Kalhammer et al. (2007).

Table 2: Price of upgrades in the Purchase Design game (prices incremental to a conventional vehicle)

<table>
<thead>
<tr>
<th>Attributes</th>
<th>Attribute level</th>
<th>“High” price scenario</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Car</td>
</tr>
<tr>
<td>Base premium</td>
<td></td>
<td>$3,000</td>
</tr>
<tr>
<td>Added premiums</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recharge time</td>
<td>8 hours</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>4 hours</td>
<td>+$500</td>
</tr>
<tr>
<td></td>
<td>2 hours</td>
<td>+$1,000</td>
</tr>
<tr>
<td></td>
<td>1 hour</td>
<td>+$1,500</td>
</tr>
<tr>
<td>CD mpg and type&lt;sup&gt;a&lt;/sup&gt;</td>
<td>Blended:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>75 mpg</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>100 mpg</td>
<td>+$1,000</td>
</tr>
<tr>
<td></td>
<td>125 mpg</td>
<td>+$2,000</td>
</tr>
<tr>
<td></td>
<td>All-electric</td>
<td>+$4,000</td>
</tr>
<tr>
<td>CD range</td>
<td>10 miles</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>20 miles</td>
<td>+$2,000</td>
</tr>
<tr>
<td></td>
<td>40 miles</td>
<td>+$4,000</td>
</tr>
<tr>
<td>CS mpg</td>
<td>Conventional mpg +10</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>Conventional mpg +20</td>
<td>+$500</td>
</tr>
<tr>
<td></td>
<td>Conventional mpg +30</td>
<td>+$1,000</td>
</tr>
</tbody>
</table>

<sup>a</sup> Metric conversions: 75 mpg = ~3.14 L/100km, 100 mpg = ~2.35 L/100km, 125 mpg = ~1.88 L/100km, and all-electric = 0.00 L/100km.

9 To remain consistent with most of the cited PHEV literature and the PHEV design space presented to the American respondents to our survey, we report B operation in miles per gallon (mpg), where 75 mpg is ~3.14 liters per 100km.

10 Fuel economy was based only on gasoline use; it did not account for electricity from the grid.

11 Still, we note that the prices used in the design exercise are intended only to be internally consistent to the exercise, making the relative price of each improvement plausible. The external validity of the absolute prices, i.e., whether we have correctly guessed the future prices of PHEV performance attributes in the real world, is less relevant at this step of our simulation. Further, the general conclusions we offer are more susceptible to battery prices being radically lower than we use; higher prices reinforce our conclusions.
While respondents were free to specify any vehicle as their likely next new vehicle, the analysis to convert their PHEV designs into battery requirements simplifies vehicles into two categories: 1) cars (and car-like vehicles) and 2) trucks (and truck-like vehicles). Further, in contrast to the three other sets of battery requirements, our performance requirements are more conservatively based solely on the more aggressive US06 drive schedule.

In the present analysis, we focus only on the PHEV designs created by the subset of respondents we defined as belonging to a potential early PHEV market: those who both reported an electrical outlet within 25 feet of their home parking space during their diary day and accepted the proffered base PHEV or designed an upgraded PHEV in the “high” price scenario of the design exercise rather than accept the conventional vehicle. Such respondents make up one-third of the entire sample of US new car buying households.

In summary, the PHEV goals we present are a distribution created by consumers interested in purchasing a PHEV. This distribution, simplified to show only the possible combinations of CD operation type and range, is presented in Table 3. In a scenario of relatively high battery prices representing near-term estimates, a substantial number of new vehicle-buying households reported that they were interested in vehicles with plug-in capabilities. The majority of these potential early market respondents (69 percent) selected the base B-10 described above, i.e., the PHEV design with the lowest battery power and energy requirements.

12 Axsen and Kurani (2008) also presented a “low” price scenario; it is not discussed here. PHEV design priorities expressed by respondents were similar in both scenarios, with a higher percentage of respondents either selecting the base PHEV or selecting upgrades to the base PHEV in the “low” price scenario.

13 While we do not discuss recharge time and CS fuel economy in this analysis, we do note that CS fuel economy upgrades were chosen most frequently—an attribute affects battery design and cycle life. However, we do not anticipate CS fuel economy to hold significant implications for the two main battery requirements discussed in this paper: peak power density and energy density.
Table 3: Distribution (%) of PHEV designs by early market potential respondents

<table>
<thead>
<tr>
<th>CD type</th>
<th>Prospective car buyer</th>
<th>Prospective truck buyer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blended:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>75 MPG</td>
<td>35.95 3.65 1.02</td>
<td>33.35 2.16 0.00</td>
</tr>
<tr>
<td>100 MPG</td>
<td>5.08 3.65 1.50</td>
<td>3.95 1.73 0.00</td>
</tr>
<tr>
<td>125 MPG</td>
<td>2.48 1.29 0.56</td>
<td>0.68 0.33 1.06</td>
</tr>
<tr>
<td>All Electric</td>
<td>0.30 0.07 0.20</td>
<td>0.10 0.00 0.87</td>
</tr>
</tbody>
</table>

* Metric conversions: 75 mpg = ~3.14 L/100km, 100 mpg =~ 2.35 L/100km, 125 mpg = ~1.88 L/100km, and all-electric = 0.00 L/100km.

Note: early market respondents includes 33 percent of the total U.S. new-vehicle buying sample.

3. Understanding battery requirements

3.1. Batteries for PHEV goals

To assess the battery requirements to meet the PHEV performance goals from the prior section, we first discuss five requirement categories: power, energy capacity, life, cost, and safety (Table 4), then focus on power and energy. To illustrate the five types of requirements, we focus on the USABC, MIT, and EPRI goals before discussing the battery requirements of the PHEV design space in which our respondents worked.

Table 4: Battery pack requirements for PHEV performance goals

<table>
<thead>
<tr>
<th>Units</th>
<th>USABC&lt;sup&gt;a&lt;/sup&gt;</th>
<th>MIT&lt;sup&gt;b&lt;/sup&gt;</th>
<th>EPRI&lt;sup&gt;c&lt;/sup&gt;</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>AE-10</td>
<td>AE-40</td>
<td>B-30</td>
</tr>
<tr>
<td>Power</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Peak power</td>
<td>kW</td>
<td>50</td>
<td>46</td>
</tr>
<tr>
<td>Peak power density</td>
<td>W/kg</td>
<td>833</td>
<td>383</td>
</tr>
<tr>
<td>Energy</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total energy capacity</td>
<td>kWh</td>
<td>5.6</td>
<td>17.0</td>
</tr>
<tr>
<td>Total energy density</td>
<td>Wh/kg</td>
<td>93</td>
<td>142</td>
</tr>
<tr>
<td>Life</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Calendar life</td>
<td>years</td>
<td>15</td>
<td>15</td>
</tr>
<tr>
<td>CD cycle life</td>
<td>cycles</td>
<td>5,000</td>
<td>5,000</td>
</tr>
<tr>
<td>CS cycle life</td>
<td>cycles</td>
<td>300,000</td>
<td>300,000</td>
</tr>
<tr>
<td>Cost</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>OEM price&lt;sup&gt;d&lt;/sup&gt;</td>
<td>$</td>
<td>$1,700</td>
<td>$3,400</td>
</tr>
<tr>
<td>OEM price/total kWh</td>
<td>$/kWh</td>
<td>$300</td>
<td>$200</td>
</tr>
</tbody>
</table>

<sup>a</sup> As summarized in Pesaren et al. (2007).
<sup>b</sup> As summarized in Kromer and Heywood (2007).
<sup>c</sup> As summarized in Graham et al. (2001).
<sup>d</sup> Assuming 100,000 units of production per year.
First, total battery peak power is represented in kW and peak power density in W/kg.\textsuperscript{14} Three factors explain most of the variation in power requirements in Table 4. Higher power is required for (1) a larger and/or heavier vehicle, (2) AE rather than B operation, and (3) a more aggressive drive cycle. Required peak power density is determined by these factors, as well as the assumed battery mass.

Second, energy capacity requirements relate to the amount of energy stored in the batteries (kWh) and the energy density (Wh/kg). Energy storage determines CD range; energy density largely determines the mass of the battery system. We report energy capacity as total energy, not available energy. For instance, the USABC’s AE-10 requires 3.9 kWh of available energy; their AE-40 requires 11.9 kWh. Given their assumed 70 percent DOD, these available energy values correspond to battery systems storing total energy of 5.6 and 17.0 kWh, respectively as shown in Table 4.

Third, Table 4 lists three measures of battery life. One, calendar life is the ability to limit degradation over time, which may be independent of how often or how hard the battery is discharged and charged. Two, CD cycle life, or deep cycle life, is the number of full discharge-charge cycles over the usable DOD the battery can perform. Three, CS cycle life, or shallow cycle life, refers to SOC variations of only a few percent occurring throughout CD and CS mode. The battery frequently takes in electric energy (charges) from the gasoline engine and from regenerative braking and passes energy to the electric motor (discharges) as needed to power the vehicle or recharge the battery. Although the batteries currently used in HEVs achieve high shallow cycle life, in a PHEV some of the shallow cycles would occur at a lower SOC if the vehicle is driven in CS mode. Shallow cycling at low SOC may have a greater negative effect on battery life than shallow cycling at higher SOC.

\textsuperscript{14} The USABC’s peak power requirements are based on short acceleration pulses of 2 and 10 seconds
Fourth, battery cost is cited as one of the most crucial factors affecting the commercial deployment of electric drive vehicles, e.g. Kalhammer et al. (2007). The USABC OEM cost requirements are $300/kWh and $200/kWh for AE-10 and AE-40 battery packs, respectively. These cost goals are much lower than current prices; Pesaran et al. (2007) estimate that in general, current advanced battery costs range from $800/kWh to $1000/kWh or higher.

Fifth, safety is important due to fact that batteries store energy and contain chemicals that can be dangerous if released or consumed in an uncontrolled manner, such as through short circuits, impacts, overcharging, or high heat (Kalhammer et al. 2007). In electric-drive automotive applications, batteries use management systems that monitor cell voltage and temperature and can take some corrective action when necessary. The USABC’s battery requirements do not include specific safety objectives. Safety is typically assessed through abuse tolerance tests; such tests are inputs to a subjective rating of “acceptability” (Doughty and Crafts, 2005).

3.2. Towards consumer-informed battery peak power and energy requirements

In this paper, we reevaluate only peak power and energy requirements to meet CD goals, i.e., AE vs. B operation and CD range. The task of reevaluating life, cost, and safety requirements in light of input from consumers is left to future research.

In Table 5 we present peak power and energy requirements for the 24 PHEV designs in Table 3. These requirements are estimated for both car and truck body types using analyses by Burke and Van Gelder (2007), Kromer and Heywood (2007), Graham et al. (2001) and

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15 These goals are stated as costs to auto manufacturers, and do not include the markup that would be passed on to consumers. Estimates of the markup on advanced automotive batteries from OEM to consumer range from 25 to 33 percent (Kromer and Heywood, 2007).

16 Not to diminish the importance of safety, but we note that automotive consumers, automotive service and fueling personnel, and emergency first responders have become habituated to handling toxic and highly flammable fuels, i.e., gasoline and diesel.
Duvall et al. (2002). In general, the power and energy requirements in our design space more than span the variety of requirements from the other three studies presented in Table 4. For example, the peak power requirements derived from the PHEV goals of the USABC, MIT, and EPRI range from 44 to 99 kW; the peak power of our PHEV design space spans from 27 to 138 kW.

Table 5: Battery pack requirements for PHEV goals in UCD design space

<table>
<thead>
<tr>
<th>CD Type</th>
<th>Units</th>
<th>Car</th>
<th>Truck&lt;sup&gt;a&lt;/sup&gt;</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>10</td>
<td>20</td>
</tr>
<tr>
<td>B (75 MPG)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Peak power&lt;sup&gt;c&lt;/sup&gt;</td>
<td>kW</td>
<td>27&lt;sup&gt;b&lt;/sup&gt;</td>
<td>27&lt;sup&gt;b&lt;/sup&gt;</td>
</tr>
<tr>
<td>Peak power density</td>
<td>W/kg</td>
<td>453</td>
<td>340</td>
</tr>
<tr>
<td>Total energy capacity&lt;sup&gt;d&lt;/sup&gt;</td>
<td>kWh</td>
<td>1.5&lt;sup&gt;e&lt;/sup&gt;</td>
<td>2.9&lt;sup&gt;e&lt;/sup&gt;</td>
</tr>
<tr>
<td>Total energy density</td>
<td>Wh/kg</td>
<td>24</td>
<td>36</td>
</tr>
<tr>
<td>B (100 MPG)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Peak power&lt;sup&gt;c&lt;/sup&gt;</td>
<td>kW</td>
<td>37&lt;sup&gt;b&lt;/sup&gt;</td>
<td>37&lt;sup&gt;b&lt;/sup&gt;</td>
</tr>
<tr>
<td>Peak power density</td>
<td>W/kg</td>
<td>613</td>
<td>460</td>
</tr>
<tr>
<td>Total energy capacity&lt;sup&gt;d&lt;/sup&gt;</td>
<td>kWh</td>
<td>1.7&lt;sup&gt;e&lt;/sup&gt;</td>
<td>3.4&lt;sup&gt;e&lt;/sup&gt;</td>
</tr>
<tr>
<td>Total energy density</td>
<td>Wh/kg</td>
<td>28</td>
<td>43</td>
</tr>
<tr>
<td>B (125 MPG)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Peak power&lt;sup&gt;c&lt;/sup&gt;</td>
<td>kW</td>
<td>43&lt;sup&gt;b&lt;/sup&gt;</td>
<td>43&lt;sup&gt;b&lt;/sup&gt;</td>
</tr>
<tr>
<td>Peak power density</td>
<td>W/kg</td>
<td>720</td>
<td>540</td>
</tr>
<tr>
<td>Total energy capacity&lt;sup&gt;d&lt;/sup&gt;</td>
<td>kWh</td>
<td>2.3&lt;sup&gt;e&lt;/sup&gt;</td>
<td>4.6&lt;sup&gt;e&lt;/sup&gt;</td>
</tr>
<tr>
<td>Total energy density</td>
<td>Wh/kg</td>
<td>38</td>
<td>57</td>
</tr>
<tr>
<td>AE</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Peak power&lt;sup&gt;c&lt;/sup&gt;</td>
<td>kW</td>
<td>96&lt;sup&gt;f&lt;/sup&gt;</td>
<td>96&lt;sup&gt;f&lt;/sup&gt;</td>
</tr>
<tr>
<td>Peak power density</td>
<td>W/kg</td>
<td>1600</td>
<td>1200</td>
</tr>
<tr>
<td>Total energy capacity&lt;sup&gt;d&lt;/sup&gt;</td>
<td>kWh</td>
<td>3.8&lt;sup&gt;g&lt;/sup&gt;</td>
<td>7.5&lt;sup&gt;g&lt;/sup&gt;</td>
</tr>
<tr>
<td>Total energy density</td>
<td>Wh/kg</td>
<td>63</td>
<td>94</td>
</tr>
</tbody>
</table>

<sup>a</sup> A “truck” is assumed to require 28 percent higher electricity use and 44 percent higher peak power relative to a “car,” as approximated from Graham et al.’s (2001) and Duvall et al.’s (2002) estimates for midsize car and midsize SUV PHEV-20s.

<sup>b</sup> Peak power approximated from Burke and Van Gelder (2008) simulations for Toyota Prius with US06 drive cycle—multiplied by 1.36 to scale from ~1300 kg car to ~1600 kg car.

<sup>c</sup> Assuming motor efficiency of 85 percent.

<sup>d</sup> Assuming DOD of 80 percent.

<sup>e</sup> Energy use approximated from Burke and Van Gelder (2008) simulations for Toyota Prius with US06 drive cycle—multiplied by 1.16 to scale from ~1300 kg car to ~1600 kg car.

<sup>f</sup> Peak power approximated from Kromer and Heywood (2007) simulations of optimized Toyota Camry with US06 drive cycle, assuming 85 percent motor efficiency—multiplied by 1.36 to scale from ~1300 kg car to ~1600 kg car.

<sup>g</sup> Energy use approximated from Kromer and Heywood (2007) simulations of optimized Toyota Camry with US06 drive cycle, assuming 85 percent motor efficiency—multiplied by 1.16 to scale from ~1300 kg car to ~1600 kg car.
In Figure 2 we plot the distribution of battery cell-level peak power and energy requirements (Table 5) we derived from the PHEVs created by respondents (Table 3) on to a modification of Kalhammer et al.’s (2007) Ragone plots representing the trade-off between peak power density and energy density.\(^{17}\) A region bounded in black represents a range of NiMH capabilities and another in grey represents Li-ion chemistries. For comparison, we also plot the battery cell requirements derived by USABC, MIT, and EPRI. The interpretation of the data markers is different for the PHEV designs (goals) from the survey respondents than for the other three sets of goals. The centers of the grey circles mark the location of the peak power density and energy density requirements derived from the respondents’ designs. For our respondents’ design space data, the sizes of the grey circles are proportional to the number of respondents who chose or designed the PHEV corresponding to those battery requirements. On the other hand, the black circles marking the location of the USABC, MIT, and EPRI requirements have been sized solely to make them perceptible in the figure.

As noted earlier, the majority of potential early market respondents opted for the base B-10 version of the car or truck they were most likely to purchase next, i.e., the PHEV with the lowest peak power density and energy density requirements. Even including respondents who designed more demanding PHEVs, about 85 percent of the potential early market respondents designed PHEVs that required peak power density and energy density within the region of the Ragone plot identified by NiMH. We are not saying that the NiMH batteries in currently marketed HEVs are the right batteries for PHEVs—we are merely naming the

\(^{17}\) Thus far, we have discussed the performance requirements of a PHEV battery pack. For the remainder of the article, we distinguish between the attributes of a pack versus an individual cell. The battery pack (or system) consists of many individual battery cells, plus a cooling system, inter-cell connectors, cell monitoring devices, and safety circuits. The added weight and volume of these reduce energy density and peak power density of the pack relative to the cell. We apply a packaging factor of 0.75 to account for these effects, i.e., cell values are multiplied by 0.75 to estimate pack values. In addition, the inter-cell connectors and safety circuits of a battery pack can significantly increase resistance, decreasing the pack power rating from that achievable by a single cell. However, for this article we use the same packaging factor for both power and energy density.
location within the Ragone plot. Next, we will further explore the ability of battery chemistries to meet the identified PHEV requirements.

Fig. 2: Distribution of battery requirements for PHEV designs selected by potential early market respondents and USABC, MIT, and EPRI

Source: Chemistry Ragone plots from Kalhammer et al. (2007).

Notes: For UCD Cars and Trucks, the areas of the circles are proportional to the number of respondents who designed the PHEV from which those battery requirements flow. The circles indicating USABC’s, MIT’s, and EPRI’s requirements are sized simply to make them perceptible.

Battery specifications are taken from Table 5, assuming: (1) motor efficiency of 85 percent, (2) packaging factor of 0.75, and (3) 80 percent battery DOD.

4. What is the present status of battery technology relative to PHEV requirements?

The challenge for PHEV battery development is to find an appropriate balance among the five categories of requirements discussed in 3.1 for PHEV applications. But what are those applications? Figure 2 represents a radical reorientation of battery requirements from the PHEV goals assumed by battery and other technology experts vs. the present desires of prospective consumers. We turn now to this last question, how close are we to being able to build PHEVs that can be sold to our respondents?
There are inherent trade-offs among the five battery requirements discussed in Section 3.1. For instance, higher power density batteries tend to have lower energy density, higher cost, reduced cycle life and potentially greater safety problems than lower power density batteries. Thus, it is not possible to maximize both power and energy densities in the same battery design, let alone simultaneously meeting the most desirable life, cost and safety requirements. Understanding these trade-offs is key to appreciating the complexities and challenges of PHEV battery development. So what is the current state of battery technologies vis-à-vis the PHEV battery requirements in Figure 2?

We review two broad categories of battery chemistries: nickel-metal hydride (NiMH) and lithium-ion (Li-ion). Cell values for peak power and energy density performance of one NiMH and three different Li-ion batteries as tested at UC Davis (Burke, 2007; Burke and Miller, 2008)—lithium iron phosphate (LFP), lithium nickel, cobalt and manganese (NCM) and lithium titanium (LTO)—are plotted in Figure 3. As in Figure 2, there are two regions demarcating a range of capabilities for NiMH and Li-ion chemistries.

A comparison of Figures 2 and 3 reveals the implications that differing PHEV design goals hold for perceptions of the battery problem. It is not merely that the distribution of battery peak power density and energy density requirements derived from prospective consumers’ PHEV designs is largely skewed towards lower requirements than the USABC and MIT analyses. It is that these requirements derived from prospective consumers are far within the capabilities of several lithium-based battery chemistries and that even some NiMH batteries can meet energy density—if perhaps not peak power density requirements—of most PHEV designs created by new car buying households presently interested in PHEVs. We note that it may be unlikely that the NiMH batteries used in HEVs will be able to demonstrate the long deep cycle life that is required for PHEVs applications. It is also uncertain whether the high energy density, long cycle life NiMH EV batteries can be redesigned for PHEV
applications by reducing energy density somewhat and increasing peak power density while maintaining high deep cycle and very long shallow cycle life cycle life. Hence, further development and testing of NiMH batteries are required for PHEV applications.

Our results also do not indicate that EPRI’s requirements were the right ones all along—EPRI’s PHEVs (and their battery masses) are very different from any designed by our respondents. Further, only about one-quarter of one percent of our respondents designed a PHEV that was an AE-20 or greater passenger car (the closest approximations in our design space to EPRI’s assumed goals).

Fig. 3: Battery cell potentials for four battery types

Source: Chemistry Ragone plots from Kalhammer et al. (2007). Battery cell potential based on testing by A. Burke at UC Davis, April 2008.

Notes: The NiMH battery is assumed to be optimized for PHEV or EV application, with higher energy density than HEV application, and lower voltage to increase peak power (while lowering peak power efficiency). Peak power measured at 60 percent efficiency, at 50 percent SOC. At 90 percent efficiency, tested peak power is 90 W/kg.

LFP, LTO and NCM batteries’ peak power measure at 90 percent efficiency, 50 percent state of charge.

But what of the other three categories of requirements? We must cautiously acknowledge that Figures 2 and 3 do not capture the only relevant characteristics of battery
chemistries—a balance among all five of the requirements discussed above is necessary. To illustrate the importance of the interrelatedness of these five battery requirements above, Table 6 presents a qualitative assessment of the same four batteries on all five, adapted from Axsen et al. (2008). NiMH batteries are presently used for most HEVs, and have demonstrated long calendar life, cycle life and safety (Kalhammer et al., 2007). However, because NiMH technology faces limitations in energy and peak power density (compared to the USABC and MIT requirements) and cost (Kalhammer et al., 2007; Anderman, 2008) battery researchers continue to develop Li-ion chemistries for PHEV applications. Li-ion has higher energy and peak power density, allowing lighter and more compact batteries (Kromer and Heywood, 2007), potentially at lower cost (Kalhammer et al., 2007). However, Li-ion does have potential drawbacks in longevity and safety due to higher chemical reactivity, requiring more sophisticated monitoring and control over cell voltage and temperature (Kalhammer et al., 2007), and leading some manufactures to delay commercial deployment (e.g. Shirouzu, 2007).

Table 6: Relative characteristics of potential PHEV battery chemistries

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Automotive Status</th>
<th>Power</th>
<th>Energy</th>
<th>Life</th>
<th>Cost</th>
<th>Safety</th>
</tr>
</thead>
<tbody>
<tr>
<td>NiMH</td>
<td>Nickel-metal hydride</td>
<td>Commercial</td>
<td>Low</td>
<td>Low</td>
<td>High</td>
<td>Mod.</td>
<td>High</td>
</tr>
<tr>
<td></td>
<td></td>
<td>production</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LFP</td>
<td>Lithium iron phosphate</td>
<td>Pilot</td>
<td>Mod.-</td>
<td>Mod.</td>
<td>High</td>
<td>Low</td>
<td>Mod.-</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>High</td>
<td></td>
<td></td>
<td></td>
<td>High</td>
</tr>
<tr>
<td>NCM</td>
<td>Lithium nickel, cobalt and manganese</td>
<td>Pilot</td>
<td>Mod.</td>
<td>Mod.-</td>
<td>Low</td>
<td>High</td>
<td>Mod.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>High</td>
<td>High</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LTO</td>
<td>Lithium titanium</td>
<td>Development</td>
<td>High</td>
<td>Low</td>
<td>High</td>
<td>Mod.</td>
<td>High</td>
</tr>
</tbody>
</table>

Source: Adapted from Axsen et al. (2008)

Taken together, Figure 3 and Table 6 demonstrate the inherent tradeoffs in battery characteristics; higher power density batteries have reduced energy density, cycle life and safety and higher cost. For these reasons, battery research continues to explore new lithium
chemistries with inherently lower energy performance to meet demanding safety and longevity requirements (e.g. LFP, LTO). However, in relation to our consumer-informed battery goals, we have demonstrated the power and energy densities required for commercialization may be much closer than implied by proponents of the battery problem.

5. Summary and conclusions

5.1. What is the battery problem?

To investigate the “battery problem”—the contention that inadequate performance of available batteries and their high cost are the main barriers to the commercialization of passenger vehicles with plug-in capabilities—within the context of commercializing PHEVs, we explored a range of experts’ and potential consumers’ PHEV performance goals, the battery requirements derived from those goals, and the status of battery technology in meeting those requirements. Our analysis suggests that the battery problem has both technical and perceptual elements. There are technological limitations to the commercialization of PHEVs. Battery development is constrained by inherent tradeoffs among five main battery attributes: power, energy, longevity, cost, and safety. Of the battery chemistries discussed, only Li-ion shows the potential to meet the high peak power density and energy density of aggressive PHEV goals specified for vehicles with all-electric capability and/or CD range over 20 miles. However, Li-ion chemistries continue to face limitations in cycle life, cost, and safety.

However, more important than concerns about technology development is the perceived problem: the previously untested assumptions regarding the types of PHEVs that can be commercialized. Influential PHEV performance/design goals from the USABC, MIT, and EPRI and implicit in the USDOE’s (2007) commercialization goals vary according to assumptions concerning CD range, CD operation (all-electric vs. blended), drive cycles,
vehicle mass, battery mass, and other issues—most of which are highly uncertain. Subsequently, estimated PHEV battery requirements flowing from these goals are equally uncertain, and thus, so are perceptions of the battery problem. Ultimately, the “true” requirements of PHEV technology will depend on consumers’ valuation of different PHEV designs and capabilities.

To bring U.S. consumers’ perspectives to the battery problem, we drew from a recent nationwide, representative survey of over 2000 new vehicle-buying households. The multi-day survey was carefully designed and pre-tested to prepare respondents before eliciting their PHEV design priorities; among other things, each respondent completed a one-day driving and parking diary to assess their own potential to recharge a PHEV, was provided an 8-page PHEV buyers’ guide describing design considerations, and completed a preparatory design exercise before completing the *Purchase Intention* game.

In PHEV design games presenting realistically high price scenarios, the respondents who chose PHEVs tended to design shorter CD-range PHEVs that rely on blended rather than all-electric operation. Given these PHEV designs, more aggressive goals may be unnecessary for near-term, even immediate, PHEV commercialization.

In other words, the range of assumptions represented by the USABC, MIT, and EPRI PHEV performance goals did not encompass the types of vehicles potential PHEV consumers say they value. Given elicited consumer priorities, the peak power density and energy density requirements of the majority of potential PHEV buyers in our sample could likely be met with a currently available battery chemistry, e.g., NiMH. We are not saying that existing NiMH batteries in HEVs can be used for PHEVs; there are still life and cost requirements to be considered. For example, the excellent shallow cycle life that NiMH batteries have demonstrated in HEVs may not be taken as an accurate measure of their deep cycle life in PHEVs. However, in contrast to statements by battery researchers indicating that accelerated
PHEV development may be a misguided “detour” due to the large gap between present battery performance and performance requirements for PHEVs (Anderman, 2008), we are saying that appropriate batteries may be closer for commercially viable PHEVs than often realized and that the battery problems to be solved for those batteries are radically different from the power/energy/cost/safety issues implied by the USABC and others.

So, what is the battery problem? While further battery development across all five categories of requirements is surely advisable to improve both near-term and long-term prospects for many types of electric drive vehicles, the direction of such development should be more carefully aligned with the distribution of consumer interests in the near and long term. A high priority would be to better match the performance of electric-drive vehicles and their batteries to the demands of their consumers.

5.2. Policy implications

Perceptions of the battery problem hold important implications for policy; it was the perceived gap between the capabilities of battery technology and the EV goals assumed by automotive OEMs for potential EV buyers that convinced CARB to reduce ZEV requirements in the late 1990s. In the present day, the commercialization potential for PHEVs should be based on analysis of both the state of battery technology and the interests of consumers. As demonstrated in this study, there is a role for less ambitious PHEV designs with shorter CD ranges and blended CD operation in the near term. Such designs would meet the interests of many current vehicle buyers at relatively lower cost premiums, while still significantly contributing to reductions in GHG emissions, air pollution, and petroleum use. Thus, it may not be necessary that USABC’s goals be met by a new battery technology before the commercial introduction or success of PHEVs can or should occur.
Of course, policymakers are not just interested in meeting consumer demand, but also in achieving environmental and energy goals. For instance, the commercialization of PHEVs operating all-electrically in CD mode and with longer CD ranges would result in larger reductions in petroleum use and greenhouse gas emissions—per vehicle. However, the successful commercialization of such ambitious PHEV designs in the short term would likely require more aggressive policy actions such as high financial incentives, large-scale vehicle demonstrations, and pervasive information campaigns—to overcome not just the higher cost of such added performance, but also the lack of inherent interest observed among a sample of potential PHEV consumers. Thus, while the PHEV performance assumed by the USABC and others provide a possibly useful benchmark for future targets for PHEV battery technology, a near-term focus on less aggressive goals may offset more petroleum and emissions in the long run. However, even assumptions regarding the future strategies for the development of PHEVs should be continually reevaluated from a consumer standpoint to assure alignment with a developing market.

Efforts to meet environmental and energy targets via government regulation and incentives should explicitly acknowledge viable near-term designs of less aggressive electric-drive vehicles—designs that appear to be of greater interest to consumers. For instance, at the time of this writing, CARB is in the process of updating the ZEV mandate to encourage not just PHEVs with all-electric range, but also those designed for blended operation. While these changes will better align manufacturer incentives with the consumer-informed results of this study, CARB could take additional steps to promote the more specific PHEV attributes found to appeal to consumers, such as high fuel economy in both charge-depleting and charge-sustaining operation. Other electric-drive regulation and incentive programs should undergo similar reevaluations. Because vehicle developers and consumer behavior alike can be shaped by government regulation, regulators must understand the implications of the
technological definitions and goals that they establish and incentivize. Allowing incentives only for the most advanced—and as yet to be demonstrated—PHEVs may unnecessarily delay the deployment of any PHEVs and thus the benefits that can flow from them.

In summary, policymakers, automakers, battery developers, and consumers should be aware that the battery problem is both technological and perceptual. At the present time we find a mismatch between the PHEV designs that experts assume and ones that consumers (at least, hypothetically) design. An understanding of the fundamental battery issues discussed in this article—including the point-of-view that a better battery is the battery that matches the priorities of its users—should facilitate more grounded debates about the present and future of PHEVs and indeed of all electric-drive vehicles.
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