

# OREGON DEPARTMENT OF ENERGY

## Annual Performance Progress Report (APPR) for 2026

### Agency Mission:

The Oregon Department of Energy helps Oregonians make informed decisions and maintain a resilient and affordable energy system. We advance solutions to shape an equitable clean energy transition, protect the environment and public health, and responsibly balance energy needs and impacts for current and future generations.



# OREGON DEPARTMENT OF ENERGY

## Annual Performance Progress Report (APPR) for 2026

### INTRODUCTION

To achieve our mission, the agency oversees diverse programs to meet the state’s energy goals and policies – including programs that are not necessarily included in the scope of this report. The areas covered by this biennium’s key performance measures are important for meeting Oregon’s energy goals. Areas not included in the KPMs are also critical, such as ODOE’s Nuclear Safety and Energy Security division, which oversees Oregon’s interests in the Hanford Nuclear Site cleanup and ensures that the state is prepared to respond to nuclear- and energy-related emergencies. Further, the KPMs do not wholly capture ODOE’s work to support energy policy development and innovation – efforts such as promoting energy resilience, providing technical expertise on issues like home energy performance and residential energy codes, and tracking emerging issues like electric vehicles, energy storage, renewable natural gas, and more.

The agency is reporting on seven key performance measures:

| <b><i>KPM#</i></b> | <b><i>Key Performance Measures (KPMs)</i></b>                    | <b><i>Page #:</i></b> |
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| KPM # 1     | CUSTOMER SERVICE: Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall, timeliness, accuracy, helpfulness, expertise, availability of information. | Measured since: 1997 |
|-------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|
| Goal        | Provide customers with a high degree of satisfaction with ODOE programs and services.                                                                                                                             |                      |
| Data source | Survey conducted by the department.                                                                                                                                                                               |                      |
| Owner       | Heather Sheehan, KPM Coordinator, Phone: 503-480-9951                                                                                                                                                             |                      |

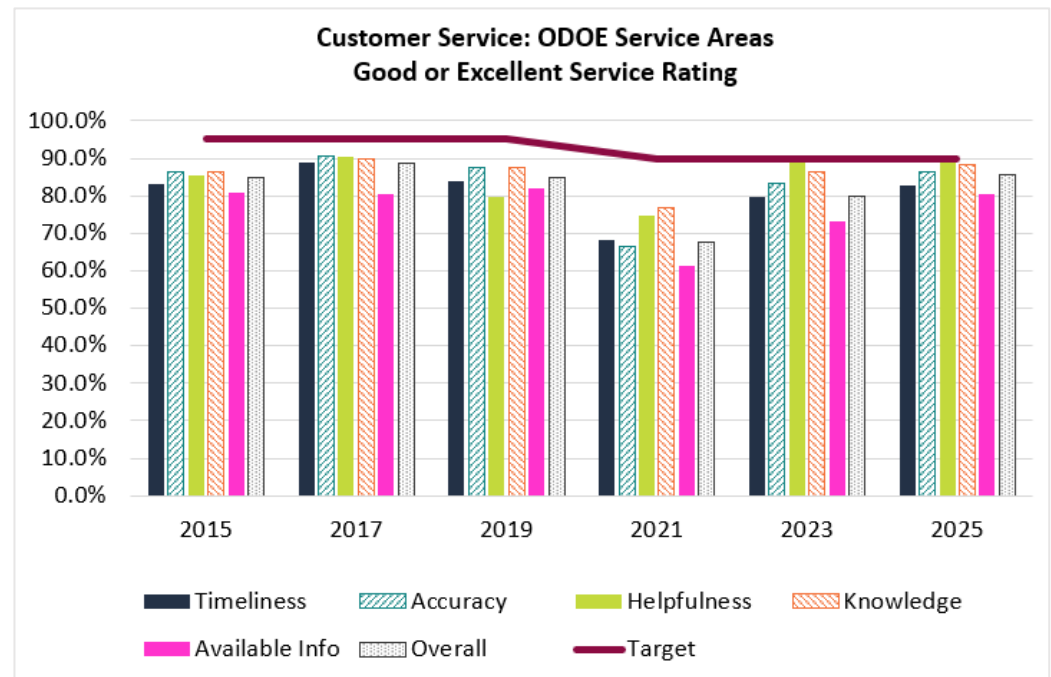
## 1. HOW WE ARE DOING

**Results.** The Oregon Department of Energy reports every odd-numbered year on results from customer service surveys to measure this Key Performance Measure. Fourteen topic-based surveys were issued and the results are outlined in this report. Each topic-based survey included the same six questions about the agency that measure customer service: timeliness, accuracy, helpfulness, knowledge, availability of information, and overall service. Results represent customer feedback ratings of "good" or "excellent," weighted to remove any "don't know" or "N/A" responses. All categories showed an increase in ratings over the last biennium, but the agency remains below the overall target goal of 90 percent.

**About the Target.** The Legislative Fiscal Office updated the target to 90 percent of respondents rating "good" or "excellent" for all service categories in 2021. In preceding years, the target was 95 percent.

Customer service is an integral part of ODOE's work and an essential component of meeting the agency's mission. For day-to-day operations, the agency defines "customer" broadly – from community stakeholders to industry representatives to fellow state agencies.

**About the Data.** The survey was comprised of results from 14 topic-based surveys for current ODOE program areas and activities. Survey results were carefully reviewed, including customer feedback in the additional open-ended questions the agency included in the surveys. Moving forward, ODOE will continue to survey new groups of customers as programs begin and end at the agency.



## 2. FACTORS AFFECTING RESULTS

**Background.** The 2024-2025 customer survey results show a measured increase in satisfaction in all areas over the last biennium. Some factors have likely influenced this improvement, including better survey methodology and new ODOE incentive programs that benefit Oregonians.

**Survey Methodology.** For this KPM, ODOE previously surveyed external customers once each biennium using the standard customer service questions. In an effort to gather more timely and relevant survey results, ODOE now issues targeted surveys for specific programs each summer (apart from a schools program survey, which is sent in the spring before summer break). Topic-based questions help us measure our services in addition to the six required questions measuring overall services. Starting in 2021, ODOE also added demographic questions (racial/ethnic background, geographic area, and household income) to better understand who we are serving.

As of 2021, ODOE sends topic-based surveys by customer service area, such as to members of the public interested in the energy facility siting processes; contractors participating in energy incentive programs; members and attendees of ODOE stakeholder and advisory bodies; school districts participating in schools-related programs; and others. In the survey emails, ODOE reminds the recipients how they engaged with us. This approach has been successful in receiving relevant results for our programs (for example, no comments from people confused about why they received the survey or commenting on programs that aren't ours).

While ODOE reports survey results every odd-numbered year, we will continue to survey most customers annually or on a regular basis. For example, ODOE has made a survey available year-round for customers who want to provide feedback at any time.

**Response Rate.** With the improved methodology for surveying, it becomes difficult to measure a true response rate. As noted above, ODOE has a general customer service survey that we leave open year-round, so we don't have a list of survey recipients against which we can compare a response rate. Because we measure annually for many ODOE programs, some recipients may ultimately fill it out twice – one for each year they received services during the biennium.

The number of responses received increased between 2023 and 2025, however. In 2023, ODOE received about 200 survey responses, and about 270 in 2025. Some topics, such as energy incentive programs, had more engagement. Others received few responses, even after an email reminder, a mention in ODOE's monthly newsletter, and targeted emails from specific staff members in place of a generic email blast.

**Strategic Plan.** The Oregon Department of Energy published a new 2026-2029 Strategic Plan earlier this year. The plan includes five pillars that are the foundational elements to make our agency successful. The customer service surveys will help measure success across the pillars, but particularly for Pillar 2: Proactive, Inclusive Collaboration and Communication and Pillar 3: Accessible, Effective Services and Programs. Results from surveys can serve as progress indicators for the related actions outlined under the pillars.

## 3. HOW WE COMPARE.

ODOE’s survey results have fluctuated over the years – as noted above, responses are likely influenced by expanded customer bases thanks to incentive programs, as well as improved survey methodology. In the 2021 survey in particular, there were fewer customers to survey due to lack of customer-facing programs as long-time incentives met their legislative sunset. The 2023 and 2025 surveys saw marked improvement in all categories following new incentive programs (and therefore new customers).

| KPM #2      | ZERO EMISSION VEHICLE ADOPTION IN OREGON: ZEV registrations in the light-duty vehicle sector statewide.                                                                            | Measure since: 2020 |
|-------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|
| Goal        | Meet the targets established in SB 1044 for statewide ZEV adoption, including that State agencies procure 25 percent of eligible fleet vehicles as zero emission vehicles by 2025. |                     |
| Data source | Oregon Department of Transportation, Department of Motor Vehicle registration Data                                                                                                 |                     |
| Owner       | Heather Sheehan, KPM Coordinator, Phone: 503-480-9951                                                                                                                              |                     |

## 1. HOW WE ARE DOING

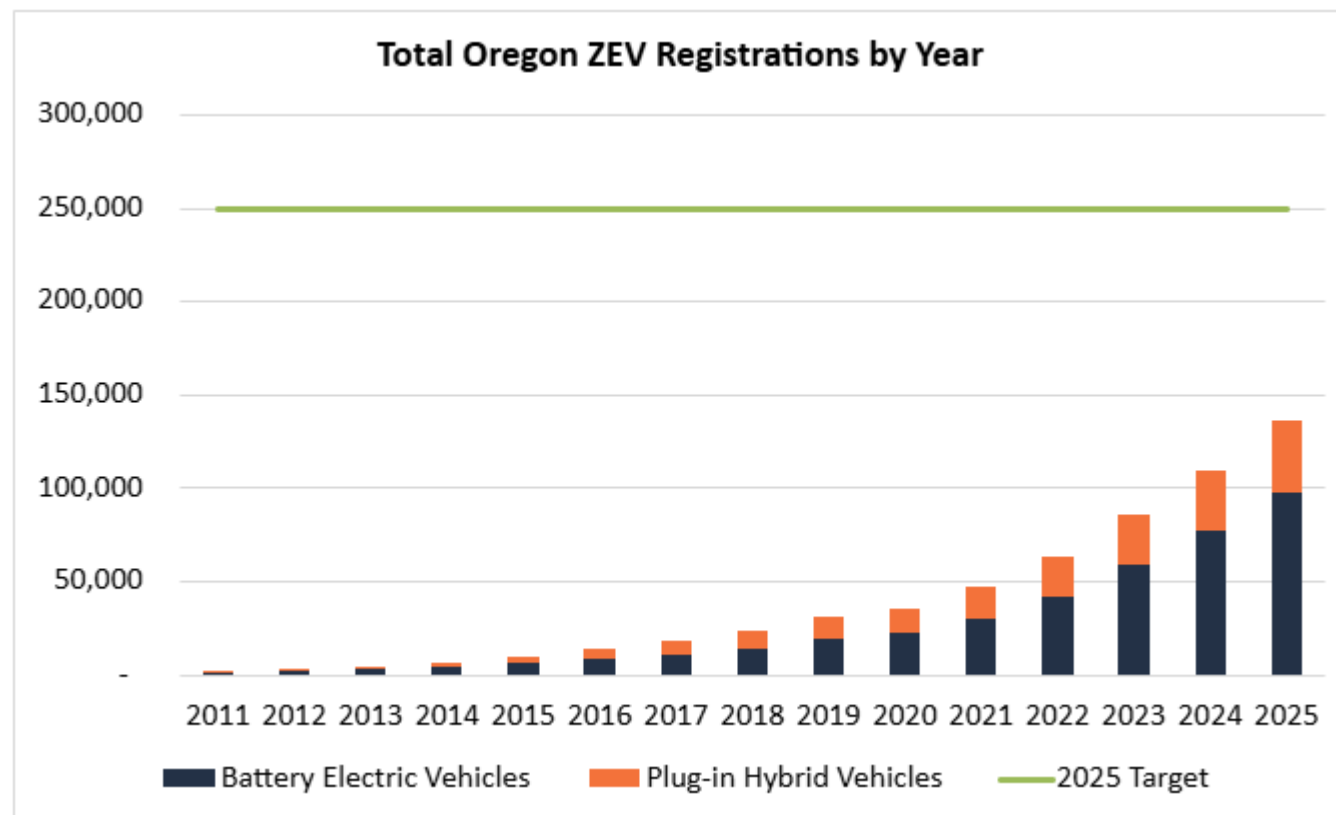
**Results.** Oregon added 25,904 registered light-duty ZEVs in 2025, ending the year with 135,454. As of the end of May 2026, there are 140,298 light-duty zero-emission vehicles registered in Oregon, comprising 3.75 percent of passenger vehicles. Of these, 38,261 are PHEVs and 102,037 are BEVs. In 2025, light-duty EVs were 15.6 percent of all vehicles sales. Although the percentage share of ZEV registrations has been relatively flat since 2023, total ZEV registrations continue to grow. Figure 1 and Table 1 show the state’s total ZEV registrations each year, broken out into battery electric vehicles in the bottom portion of the bars, and plug-in hybrid electric vehicles in the top portion of the bars. In 2025, Oregon made limited progress toward the state’s 2025 EV adoption goal of 250,000 registered ZEVs, ultimately falling short of the target.

**Table 1. Zero-Emission Vehicles as a Percentage of Total Light-Duty Vehicles in Oregon by Year<sup>i</sup>**

| Year | Light-Duty Vehicles | Total ZEVs | ZEVs as % of Light-Duty |
|------|---------------------|------------|-------------------------|
| 2011 | 3,414,178           | 1,197      | 0.04%                   |
| 2012 | 3,423,188           | 2,238      | 0.07%                   |
| 2013 | 3,465,840           | 4,374      | 0.13%                   |
| 2014 | 3,526,839           | 6,642      | 0.19%                   |
| 2015 | 3,624,079           | 9,313      | 0.26%                   |
| 2016 | 3,744,150           | 13,169     | 0.35%                   |
| 2017 | 3,839,134           | 17,313     | 0.45%                   |
| 2018 | 3,881,355           | 22,847     | 0.59%                   |
| 2019 | 3,972,907           | 30,242     | 0.76%                   |
| 2020 | 3,591,318           | 35,165     | 0.98%                   |
| 2021 | 3,566,576           | 46,708     | 1.31%                   |
| 2022 | 3,644,145           | 62,580     | 1.72%                   |
| 2023 | 3,622,715           | 85,014     | 2.35%                   |
| 2024 | 3,699,438           | 109,550    | 2.96%                   |
| 2025 | 3,733,921           | 135,454    | 3.63%                   |

<sup>i</sup> DMV data, which is continuously updated to include vehicles that were re-registered late; therefore, past year counts may not exactly match previous reports.

**Figure 1. Total Light-duty Zero-Emission Vehicle Registrations Compared to 2025 Target**



In 2024, 3 percent of light-duty vehicles purchased by the Department of Administrative Services were ZEVs (16 out of 541), which is more than double the percentage from the last biennium but less than the 25 percent target.<sup>1</sup> This is the most recent data available on state fleet ZEV purchases. DAS has indicated they will assess counts again in late 2026, and ODOE will provide this information in the 2027 KPM 2 update.

**Our Strategy.** ODOE continues to serve as Oregon’s central resource for ZEV information and support, informing Oregonians and Oregon businesses about the benefits, costs, and availability of ZEVs. The [GoElectric.Oregon.gov](https://goelectric.oregon.gov) portal offers targeted information about electric vehicles and charging for consumers, businesses, fleets, utilities, and local governments, covering vehicle benefits, purchase and charger incentives, and ZEV resources. ODOE hosts an interactive [EV Dashboard](#) that presents statewide data on Oregon ZEVs, including registrations by county, zip code, and utility service territory, alongside a map of ZEV charging stations and a fuel/greenhouse gas savings

<sup>1</sup> Based on the 2024 State Fleet Alternative Vehicle Report Required per ORS 283.337

calculator for consumers. The dashboard combines Oregon Department of Transportation, Oregon Department of Environmental Quality, federal, Portland State University, and U.S. Census Bureau data.

ODOE also delivers technical assistance to advance vehicle electrification, including administering the [Energy Efficient Schools Program](#) that provides Public Purpose Charge funds for ZEV and charger purchases. The agency collaborates with consumer-owned utilities to provide [custom maps](#) indicating where ZEVs are charging on their systems and inform distribution system planning. Additionally, ODOE supports charging infrastructure contractors by working with the DAS Fleet Services. In fall 2026, ODOE, in partnership with ODOT and DEQ and with support from the National Association of State Energy Officials, will launch the Oregon Electric Fleet Network to bring together public and private fleets from across Oregon to share knowledge, troubleshoot challenges, and accelerate the transition to medium- and heavy-duty electric vehicles. Members will have access to peer learning, technical resources, and opportunities to provide input on policies and programs supporting fleet electrification in Oregon.

ODOE uses the data and information it collects to inform ZEV policy options and development. The agency published its third [Biennial Zero Emission Vehicle Report](#) on September 15, 2025. The report covers the general state of ZEV adoption in Oregon and deep dives on topics relevant to the barriers and opportunities associated with meeting state ZEV goals. The agency also published the [Oregon Energy Strategy](#) on November 1, 2025, which outlined policy pathways for transitioning Oregon toward its clean energy and transportation decarbonization targets. The strategy found that electrification of vehicles and other end uses is one of the five key pathways to meeting Oregon's energy and climate goals, and included 10 near-term actions the state could take to support greater transportation electrification. ODOE participates in the Zero Emission Vehicle Interagency Steering Group and the multi-agency Every Mile Counts initiative, which support collaborative efforts across multiple agencies to encourage ZEV adoption, including developing action plans, coordinating action plans, equity considerations, grant alignment, and cross-agency policy gaps to advance equitable ZEV adoption.

**About the Target.** Oregon established ZEV adoption goals with the passage of SB 1044 in 2019. Those goals are:

- By 2020, 50,000 registered motor vehicles will be zero-emission vehicles;
- By 2025, at least 250,000 registered motor vehicles will be zero-emission vehicles;
- By 2030, at least 25 percent of registered motor vehicles, and at least 50 percent of new motor vehicles sold annually, will be zero-emission vehicles; and
- By 2035, at least 90 percent of new motor vehicles sold annually will be zero-emission vehicles.

Oregon acknowledges it is not on track to meet its SB 1044 ZEV targets, particularly the 2025 registration goal, and is responding with a focused set of strategies to accelerate adoption. The state is sustaining and expanding rebates for light, medium, and heavy-duty zero-emission vehicles, bolstering state funds with federal Climate Pollution Reduction Grant funding to help reduce upfront costs for buyers. Oregon is also expanding its charging infrastructure through the National Electric Vehicle Infrastructure and Community Charging Rebates programs, while coordinating grid planning with utilities to support growing electricity demand. Equity-focused efforts and interagency collaboration through

Every Mile Counts help ensure charging access, financial support, and policy alignment as Oregon works to close the gap between current progress and long-term ZEV goals.

Beginning in 2025, [ORS 283.327](#) requires all state agency light-duty vehicle purchases to be ZEVs with exceptions where a ZEV option is not feasible. Although no data is available to report on progress in this target for the 2026 KPM, the progress on this target will be heavily influenced by what is considered feasible or not feasible for a state agency when procuring a vehicle. For example, the availability of charging options can strongly influence the feasibility of electric vehicle options for specific use case needs. Agency support from DAS, including education about the technology, will also be important.

**About the Data.** ZEV adoption is calculated and produced using Oregon Department of Transportation's Department of Motorized Vehicles passenger vehicle registration data received monthly by ODOE. Oregon state fleet adoption data is provided in the Oregon Department of Administrative Services 2024 [Biennial Examination on the Use of State-Owned Vehicles](#) required by ORS 283.337.

## 2. FACTORS AFFECTING RESULTS

Federal policy changes have reduced federal support for future ZEV adoption in Oregon. Congressional action in 2025 terminated federal tax credits for new and used light-duty personal electric vehicles, removing significant financial incentives for individual purchasers. Federal tax incentives supporting commercial vehicle electrification and charging infrastructure were also terminated, including the Section 45W Qualified Commercial Clean Vehicle Credit, which ended for vehicles acquired after September 30, 2025, and the Section 30C Alternative Fuel Vehicle Refueling Property Credit, which applies only to eligible property placed in service through June 30, 2026. However, some previously authorized federal investments continue to support EV charging infrastructure, including funding through the National Electric Vehicle Infrastructure Formula Program and the Department of Transportation's Charging and Fueling Infrastructure Grant Program. As a result, federal support for ZEV deployment is increasingly concentrated in previously appropriated infrastructure investments rather than vehicle and infrastructure tax incentives.

Oregon's regulatory framework for ZEV adoption also changed substantially in 2025, when federal action revoked the Clean Air Act waivers that had allowed California and states such as Oregon to implement the Advanced Clean Cars II and Advanced Clean Trucks rules. Those rules required increasing shares of ZEVs in Oregon's new vehicle market and were important mechanisms for achieving the state's 2030 and 2035 adoption targets. Although Oregon and other states have challenged the federal action in court, the uncertainty surrounding these regulatory requirements, together with the elimination of federal tax incentives, may slow progress toward the state's ZEV adoption goals.

Oregon's ZEV market in 2026 continues to move toward cost parity with gasoline vehicles, though upfront prices for new ZEVs remain higher by about \$7,100-\$12,000, even as falling battery costs narrow that gap. Operational cost advantages are significant: Oregon's average electricity

rate of 16.3 cents per kWh<sup>2</sup> and gasoline price of \$5.01 per gallon<sup>3</sup> result in more than \$1,700 in annual fuel savings for EV drivers compared to those driving similar gas vehicles.<sup>4</sup> This convergence is driven by increased off-lease EV supply and rising gas prices. If Oregon's gas prices returned to their 2025 levels of less than \$4 per gallon, the annual savings for EV drivers would fall from about \$1,700 in 2026 conditions to roughly \$1,200 per year.

Oregon's rebate landscape has evolved to stretch limited funding. The Oregon Clean Vehicle Rebate Program reopened on August 25, 2026.<sup>5</sup> The program offers reduced standard rebates (\$2,000 for new BEVs and \$1,500 for PHEVs) while maintaining generous Charge Ahead rebates of up to \$7,500 for new battery electric vehicles and \$4,000 for used BEVs for income-qualified households. Despite a one-time infusion of federal funding through the Climate Pollution Reduction Grant program, the program continues to be oversubscribed each year, reflecting persistent demand. Charging access, especially for residents of multifamily homes, remains a barrier, but rapid industrywide adoption of the NACS (SAEJ3400) standard now enables most new electric vehicle models to use Tesla's expansive and reliable fast-charging network.

Limited availability of chargers is a major barrier to more widespread EV uptake. This is frequently the case for state agencies, where on-site charging stations can be a prerequisite to the feasibility of procuring an EV. To address this barrier, significant charging infrastructure expansion is underway across Oregon. ODOT's NEVI-funded stations began deployment in 2025 along I-205, I-5 south of Eugene, and US-97, each including at least four 150 kW DC fast ports (Level 3), with NACS integration forthcoming. A second round of NEVI grants in 2026 will add 24 new stations (126 total ports) across major corridors, including I-84 and US-20, 26, 97, and 101, with installations planned through 2027.<sup>6</sup> Additionally, ODOT's Community Charging Rebates program has funded 1,915 Level 2 ports across 347 stations statewide, prioritizing multifamily housing, workplaces, and underserved communities, with another funding round expected in late 2026.<sup>7</sup> There remain gaps in charger funding needs, especially for private fleets, where simply relying on public charging may not meet business needs. EV adoption in fleets may hinge on budgeting charger installations, and state fleet experiences have shown that those costs can be very high, especially when major electrical upgrades are needed. The Oregon Zero-Emission Fueling Infrastructure Grant helps support charging infrastructure for medium- and heavy-duty EVs but does not cover light-duty fleets, and the funding for this program is limited. Other existing infrastructure funding programs have not supported private or public fleet charging infrastructure costs to date. The Oregon State Energy Strategy found that additional funding

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<sup>2</sup> AAA. (n.d.). Fuel Prices – Oregon Average Gas Prices. Accessed September 8, 2026. <https://gasprices.aaa.com/?state=OR>.

<sup>3</sup> U.S. Energy Information Administration. (n.d.). Electric Power Monthly – EIA. Accessed September 8, 2026. [https://www.eia.gov/electricity/monthly/epm\\_table\\_grapher.php?t=epmt\\_5\\_6\\_a](https://www.eia.gov/electricity/monthly/epm_table_grapher.php?t=epmt_5_6_a).

<sup>4</sup> Estimation created using the EV fuel costs calculator tool on the ODOE's [EV Dashboard](#).

<sup>5</sup> Oregon Department of Environmental Quality. (n.d.). Oregon.gov – Clean Vehicles. Accessed September 9, 2026. <https://www.oregon.gov/deq/aq/programs/Pages/ZEV-Rebate.aspx>.

<sup>6</sup> Oregon Department of Transportation. (n.d.) Climate Office – National Electric Vehicle Infrastructure Program in Oregon. Accessed September 8, 2026. <https://www.oregon.gov/odot/climate/pages/nevi.aspx>.

<sup>7</sup> Go Electric Oregon. 2024, July 24. *Ev Charger Rebate Program Awards \$10.9 Million, Funds Nearly 350 New Charging Stations*. <https://goelectric.oregon.gov/blog/2026/7/24/ev-charger-rebate-program-awards-109-million-funds-nearly-350-new-charging-stations-over-three-years>.

for transportation electrification is needed to make progress on state energy and climate goals. Expanding or developing programs to help address the costs of public and private charging infrastructure is one option to address the charging infrastructure gap.

**How We Compare.** Oregon continues to expect growth in ZEV adoption, though the momentum may be tempered by the recent changes in federal policy relating to electric vehicles. Even without federal purchase incentives, state-level policies and programs remain key drivers of adoption. At the same time, federal and state support for charging infrastructure still plays a role, with ongoing investments helping states add new public fast-charging ports, despite infrastructure growth lagging behind ZEV sales nationally. According to the Alliance for Automotive Innovation, in 2025, Oregon remained one of the top ZEV markets in the country, reaching 20.7 percent market share in Q3, ranking third nationally behind California and the District of Columbia, and averaged 11 percent in Q4, placing it consistently among the top states.<sup>8 9</sup>

Oregon also ranks highly in transportation electrification policy outcomes. In its 2023 Transportation Electrification Scorecard report (the most recent available), ACEEE ranked Oregon at number 8 in the nation, taking into account state policies, incentives, infrastructure, and programs supporting transportation electrification.<sup>10</sup> The National Resources Defense Council conducted a similar analysis in 2025 and Oregon placed third in the nation, behind only Vermont and California.<sup>11</sup> These reflect strong performance across planning, vehicle electrification efforts, and transportation-sector decarbonization. These figures underscore Oregon's leadership in ZEV adoption, even as federal policy shifts temper expectations, reinforcing how state incentives, regulatory frameworks, and infrastructure investments continue to shape the pace of electrifying transportation.

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<sup>8</sup> Alliance for Automotive Innovation. 2026 February 2. *Alliance for Automotive Innovation Reports New U.S. Electric Vehicle Data*. <https://www.autosinnovate.org/posts/press-release/2025-q3-get-connected-press-release>.

<sup>9</sup> Alliance for Automotive Innovation. 2026 March 25. *Alliance for Automotive Innovation Reports New U.S. Electric Vehicle Data*. <https://www.autosinnovate.org/posts/press-release/2025-q4-get-connected-press-release>.

<sup>10</sup> Huether, P., C. Cohn, B. Jennings, J. Mah, E. Taylor, C. Tolentino, and S. Vaidyanathan. 2023. *2023 State Transportation Electrification Scorecard*. ACEEE. [aceee.org/research-report/t2301](https://www.aceee.org/research-report/t2301).

<sup>11</sup> National Resources Defense Council. 2025 March. *State Transportation Scorecard: Executive Summary*. [https://www.nrdc.org/sites/default/files/2025-02/State\\_Transportation\\_Executive\\_Summary\\_FS\\_25-02-F\\_05\\_locked.pdf](https://www.nrdc.org/sites/default/files/2025-02/State_Transportation_Executive_Summary_FS_25-02-F_05_locked.pdf).

| KPM #3      | APPLICATION PROCESSING: Percent of applications reviewed and approved within administrative or statutory deadlines for Energy Facility Siting. | Measure since: 2006 |
|-------------|------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|
| Goal        | Provide timely processing of site certificates.                                                                                                |                     |
| Data source | Energy Facility Siting Division                                                                                                                |                     |
| Owner       | Heather Sheehan, KPM Coordinator, Phone: 503-480-9951                                                                                          |                     |

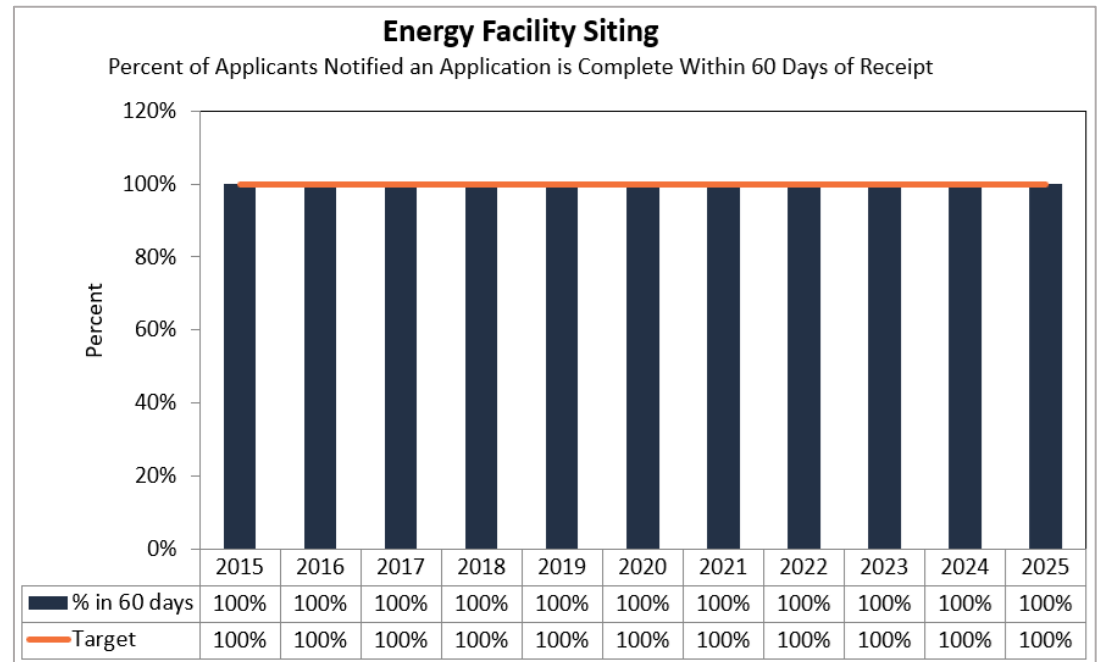
## 1. HOW WE ARE DOING

**Results.** The Energy Facility Siting Division met this target again at 100 percent.

**About the Target.** Part of the agency’s commitment to stakeholders is providing reliable resources and services. To measure this, ODOE monitors the timeliness for processing application completeness reviews for energy facility siting, reflected by the percent of new energy facility applicants notified by ODOE whether an application is complete within 60 days of ODOE receiving it.

## 2. FACTORS AFFECTING RESULTS

**About the Data.** The reporting cycle for this measure is by calendar year. The data for the energy facility siting measures represents actual completeness review processing time data for all applications received during the reporting period.



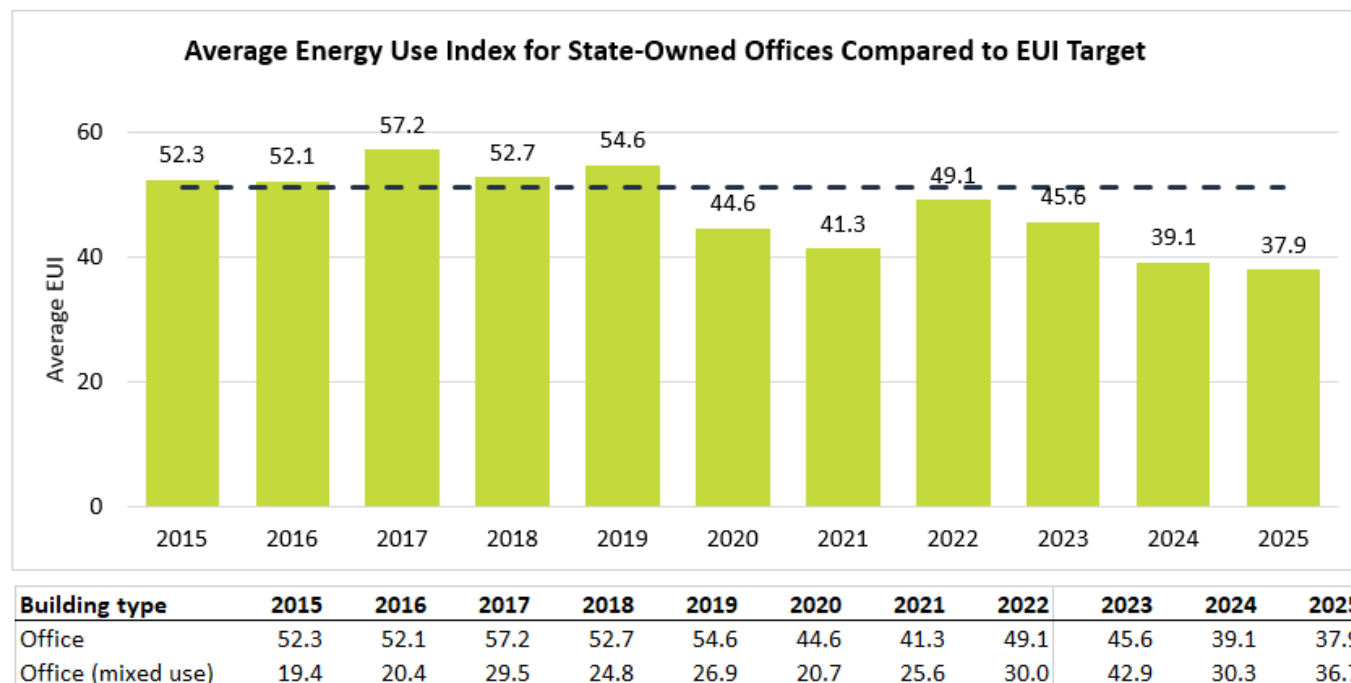
| KPM # 4     | ENERGY USE BY STATE BUILDINGS: Electrical and fossil fuel energy use in state-owned buildings by use, type and building area.                  | Measure since: 2015 |
|-------------|------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|
| Goal        | Establish a robust data set of building level energy use for state-owned buildings more than 5,000 square feet to facilitate energy reduction. |                     |
| Data source | Agencies reporting                                                                                                                             |                     |
| Owner       | Heather Sheehan, KPM Coordinator, Phone: 503-480-9951                                                                                          |                     |

## 1. HOW WE ARE DOING

**Results.** In 2025, the average Energy Use Index (EUI) for state-owned office buildings was 37.9 thousand British thermal units (kBtu) per square foot, the sixth year below the EUI target<sup>12</sup> of 51 kBtu per square foot (in the case of EUI, the goal is to be below the target). State-owned buildings are engaging in innovative energy efficiency measures to continue reducing the average EUI, resulting in less energy used and more energy saved.

In 2025, energy use saw a reduction by 1.2points from 2024, the lowest year since reporting started.

This data represent 109 state-owned office buildings at 11 state agencies totaling 218 million kBtu over 5.7 million square feet of facility space. Office buildings are only a small subset of this data, however. The State Energy Efficient Design (SEED) Program<sup>13</sup> collected information on 327 total buildings across 21 agencies in 2025. This information is saved in an ODOE-maintained dataset and allows agencies to make informed energy-efficiency investment decisions and compare their building to similar facilities in other agencies.



<sup>12</sup>The Oregon Department of Energy calculated EUI targets for each state-building type based on [ANSI/ASHRAE/IES Standard 100, Energy and Emissions Building Performance Standard for Existing Buildings](#)

<sup>13</sup> [2023-2024 State Energy Efficient Design Biennial Report](#)

**About the Target.** Building performance is typically measured in EUI (kBtu/square foot/year). Electrical and fossil fuel annual energy use data is converted into common units (British thermal units or Btu) and combined with building square footage to calculate EUI. The ASHRAE target is an EUI value that represents high performance by building type. Because the target is a metric of energy use, achieving an EUI *below* the identified target is the goal – a lower EUI means less energy used. The target for office buildings, shown by the dotted line in the chart above, is based on the ASHRAE Standard 100 high-performance EUI. The target EUIs for each building type are based on ASHRAE Standard 100-2018 targets for climate zones 4C (Western Oregon) and 5B (Eastern Oregon).

EUI targets enable agencies to compare energy used by an individual building to similar type buildings in the state or region. These macro-level indicators support agencies in identifying which buildings need to be evaluated to determine if the higher level of energy use is warranted by a building's characteristics and use profile, or if a comprehensive energy audit should be considered. ODOE delivers technical assistance, if requested, to help agencies identify solutions to lower energy use over time and reach target EUI levels. Each agency determines the cost-effective energy efficiency methods to pursue. ODOE supports agency decision-making by providing reliable building energy use information and energy efficiency consultation.

**About the Data.** ORS 276.915 requires state agencies to track annual energy use at the agency level. Agencies report more detailed facility-level data to identify additional opportunities for energy savings. Beginning in 2015, participating agencies have entered annual energy use for state-owned buildings that are more than 5,000 square feet into the EPA ENERGY STAR® Portfolio Manager platform. By tracking annual energy use, agencies see how their buildings are performing over time and can make informed decisions to determine if operational adjustments or capital investments are needed.

## 1. FACTORS AFFECTING RESULTS

**Background.** Oregon's Building Performance Standard (BPS) has significantly reshaped how state-owned buildings track, report, and evaluate energy use. BPS requires covered facilities over 20,000 square feet to maintain complete building-level utility data, benchmark energy consumption annually, and meet assigned Energy Use Intensity (EUI) targets. This shift establishes clear compliance expectations and strengthens the accuracy and consistency of statewide building performance reporting. As a result, data completeness, previously a challenge in State Energy Efficient Design (SEED) reporting cycles, is now a core requirement rather than a discretionary best practice.

**Factors Influencing Building Performance.** Even with improved data quality, a variety of factors continue to influence EUI results across the state's building portfolio. Facility characteristics such as occupancy, operating hours, equipment, and functional use all drive energy consumption. Weather variability also affects year-to-year performance. Efficiency upgrades, conservation measures, and operational improvements can reduce energy use and help facilities move towards their required EUI targets.

ODOE supports agencies in understanding these drivers through benchmark assistance, training resources, and comparative performance insights. When high-than-expected use occurs, agencies can use these tools to identify operational explanations or uncover opportunities for cost-effective reductions.

## **2. HOW WE COMPARE**

Other states in the region also require state-owned facilities to report building energy use into EPA ENERGY STAR® Portfolio Manager. Minimum square footage that triggers reporting varies between states, as do disclosure requirements.

| KPM #5a-b    | GREENHOUSE GAS CONTENT OF OREGON'S ELECTRICITY: Greenhouse gas emissions per unit of: a) electricity used in Oregon and b) electricity generated in Oregon.                                    | Measure since: 2015 |
|--------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|
| Goal         | Assist in meeting Oregon's greenhouse gas emission reduction goals in the state's electricity sector.                                                                                          |                     |
| Data sources | Oregon Department of Environmental Quality Greenhouse Gas Reporting Program, U.S. Energy Information Administration, and internal ODOE reports addressing energy mix and conservation efforts. |                     |
| Owner        | Heather Sheehan, KPM Coordinator, Phone: 503-480-9951                                                                                                                                          |                     |

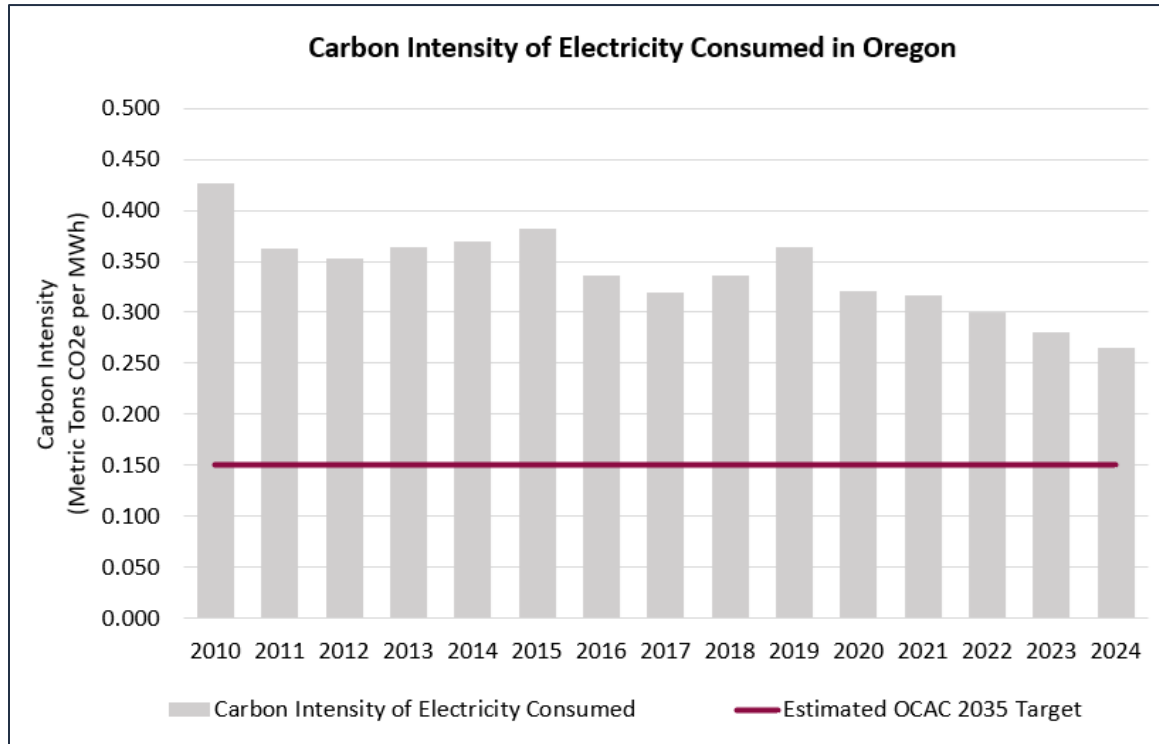
## 1. HOW WE ARE DOING

**Results.** Oregon has two electricity resource mixes: the mix of the electricity it *generates* within the state, and the resource mix of the electricity it *consumes* (a combination of electricity generated both in-state and out-of-state). The mixes are different because Oregon neither consumes all the electricity it generates nor generates all the electricity it consumes. Competitive energy markets encourage suppliers to import and export electricity across Oregon's borders to meet consumer needs. Each mix has a carbon intensity that describes greenhouse gas emissions per unit of electricity in metric tons of carbon dioxide or carbon dioxide equivalent per megawatt hour (MTCO<sub>2</sub>/MWh or MTCO<sub>2e</sub>/MWh) for that mix.

The carbon intensity of Oregon's electricity *consumption* has been steadily decreasing, from 0.427 MTCO<sub>2e</sub>/MWh in 2010 to 0.265 MTCO<sub>2e</sub>/MWh in 2024. This represents the sixth straight year of reduced carbon intensity and is the lowest reported value since at least 2010. In 2024, Oregon's mix of electricity consumed was 33.9 percent hydro, 20.4 percent natural gas, 8.3 percent coal, 7.9 percent wind, 3.9 percent solar, and 3.8 percent nuclear. Less than 1 percent in total came from biomass, biogas, geothermal, fuel oil, and other sources. The remaining 20.9 percent came from unspecified sources.<sup>14</sup> Steady reductions in the carbon intensity of Oregon's electricity consumption are due in part to new solar and wind replacing coal and natural gas. Oregon's electricity consumption from coal and natural gas dropped from 31.5 percent in 2023 to 28.7 percent in 2024. Over the same period wind and solar increased from 10.9 to 11.75 percent.

<sup>14</sup> Unspecified sources are comprised of purchases made on wholesale electricity markets, where the exact source of the electricity is unknown. DEQ assigns a default emissions rate of 0.428 MTCO<sub>2e</sub>/MWh to unspecified resources.

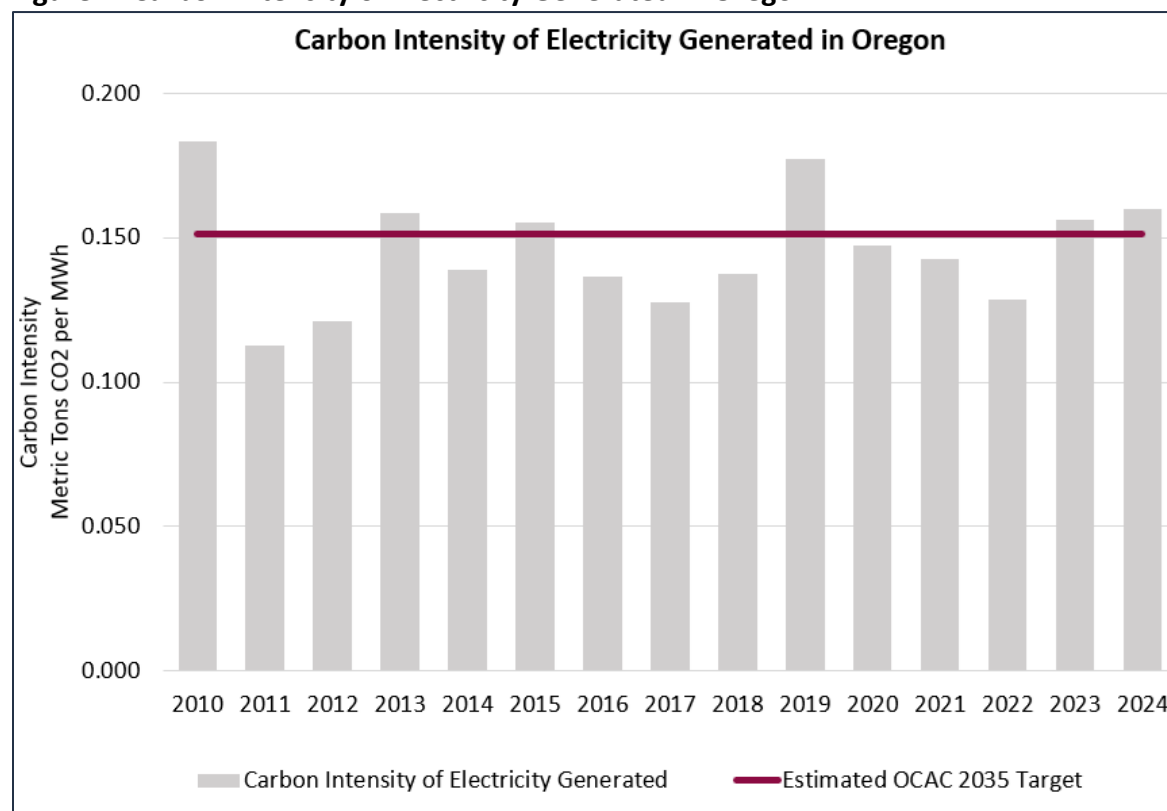
**Figure 1. Carbon Intensity of Electricity Consumed in Oregon**



The carbon intensity of electricity *generated in Oregon* increased from 0.156 MTCO<sub>2</sub>/MWh in 2023 to 0.160 MTCO<sub>2</sub>/MWh in 2024,<sup>15</sup> which is above the KPM of 0.151 MTCO<sub>2</sub>e/MWh (the solid line). Most of Oregon’s electricity generation is from hydroelectric dams that do not produce carbon emissions, with most emissions coming from natural gas plants. Year-to-year changes in the carbon intensity of in-state generation are driven by natural variation in Oregon’s hydro system and electricity load growth. In 2024, electricity generation in Oregon rose by 5 percent. Fluctuations in demand and annual precipitation amounts contribute to how much natural gas generation is used in Oregon. This was likely the primary cause of the increase in the carbon intensity of the electricity generated in Oregon from 2022 to 2024, where lower-than-average precipitation reduced available hydropower generation at the same time electricity demand increased.

<sup>15</sup> The data used in this section reflect only carbon dioxide emissions and do not include emissions of other GHGs at this time.  
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**Figure 2. Carbon Intensity of Electricity Generated in Oregon**



**About the Targets.** Oregon does not have a formal sector-specific target for the carbon intensity of electricity, but because the electricity sector accounts for about 29 percent of Oregon’s greenhouse gas emissions, this KPM was developed to specifically track progress in that sector toward state climate goals. To calculate the target, ODOE used the Oregon Climate Action Commission’s goal of 42.5 percent below 1990 levels<sup>16</sup> and the aggregate state load forecast developed from utility load projections for the Commission’s 2025 Biennial Report to the Legislature. For the electricity sector to achieve its proportional share reduction from 1990 levels, emissions in 2035 would need to be 9.5 million metric tons CO<sub>2</sub>. Dividing this by the aggregate state load forecast in 2035 yields an interim carbon intensity target of 0.151 tons of CO<sub>2</sub>/MWh, which is the solid horizontal line on both graphs.<sup>17</sup>

**Note:** The target in these KPMs will need to be updated periodically to incorporate more recent load forecasts. Updating the target will not affect the trend data but may change the horizontal target lines. The target was not updated for this 2026 KPM.

<sup>16</sup> The Oregon Climate Action Commission has since recommended accelerating the 2035 goal to achieve 45 percent GHG emissions reductions below 1990 levels by 2030, but this has not been adopted by the Oregon Legislature. ODOE will consider updating the target for future KPM reports.

<sup>17</sup> The Oregon Climate Action Commission recommended accelerating the 2035 goal to include GHG emissions reductions 45 percent below 1990 levels by 2030.

**About the Data.** ODOE uses Oregon Department of Environmental Quality greenhouse gas inventory data to determine the carbon intensity of the electricity consumed in Oregon and U.S. Energy Information Administration data for electricity generated in Oregon. The GHG Inventory is updated by DEQ annually and is based on utility generation and electricity purchases. The targets are derived using EIA data, DEQ GHG inventory data, and utility load projections. Prior to 2019, ODOE calculated the carbon intensity of electricity consumption in Oregon based on ODOE Electricity Resource Mix calculations, with specific carbon intensities assigned for each market purchase. Now those market purchases are all considered “unspecified” and assigned a regional carbon intensity value set by DEQ. These differences mean the carbon intensity methodology for the electricity consumed in Oregon reported before 2019 does not match the methodology used since 2019. While results should be similar, using the current methodology to calculate carbon intensities prior to 2019 will not yield the same results. ODOE used EIA data for the chart below showing how Oregon compares to other states in the region.

## 2. FACTORS AFFECTING RESULTS

**Background.** Carbon-free hydropower, which is a non-emitting resource, is the largest source of electricity consumed and generated in Oregon.. Other generating resources, including natural gas and coal, contribute to greenhouse gas emissions, while increasing solar and wind developments contribute to lowering the carbon intensity of electricity generated and consumed in Oregon.

There are several policy drivers helping to reduce the carbon intensity of electricity consumed in Oregon, including:

- The Oregon “Clean Energy for All” Act (HB 2021) passed in 2021.
  - HB 2021 requires PacifiCorp, Portland General Electric Company, and Oregon’s electricity service suppliers to reduce their GHG emissions by the following amounts in relation to a 2010-2012 baseline emissions level:
    - 80 percent below by 2030
    - 90 percent below by 2035
    - 100 percent below by 2040 (i.e., achieve zero emissions)
  - HB 2021 restricts the Oregon Energy Facility Siting Council from issuing new or amended site certificates for natural gas-fueled energy facilities that emit GHGs into the atmosphere.
- The Oregon Coal to Clean Act (SB 1547), passed in 2016, requires PacifiCorp and Portland General Electric Company to eliminate electricity generated by coal-fired power plants from Oregon utility rates by 2030.<sup>18</sup>
- The Oregon Renewable Portfolio Standard, first established in 2007, sets renewable energy requirements for the state’s electric utilities. Updated in 2016 via SB 1547, the Oregon RPS requires large utilities to have 50 percent of their electricity sales come from qualifying renewable energy sources by 2040; smaller utilities have lesser requirements.
- Executive Order 20-04 (2020) increased Oregon’s 2050 economy-wide GHG reduction target to 80 percent below 1990 levels.

Other policy drivers in Oregon include the federal and state Public Utility Regulatory Policies Act, or PURPA, which requires utilities to purchase the power offered to them from independent (non-utility) renewable generators with capacities of 80 MW or less. This has led to increased renewable

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<sup>18</sup> With one exception for the Colstrip plant in Montana that would enable rate-basing costs for up to five years after the plant has fully depreciated.

and carbon-free electricity. Oregon’s community-based renewable energy goal requires PacifiCorp and Portland General Electric to obtain at least 10 percent of their electrical capacity from small-scale renewable energy projects or qualifying biomass facilities. Further, green power and other voluntary programs also increase the mix of renewable resources used to meet Oregon’s electric load. In effect, these laws, policies, and programs help lower the carbon emissions of the average megawatt-hour generated and consumed.

In November 2025, ODOE published the first Oregon Energy Strategy, providing policy recommendations to achieve Oregon’s energy objectives and climate goals through insight gathered from technical resources and experts, and input from Oregonians and Oregon businesses. Energy modelling conducted to support the Oregon Energy Strategy indicates considerable load growth for electric utilities in Oregon driven primarily by new tech loads like data centers and transportation electrification. Modeling results found that Oregon utilities could reliably meet Oregon’s energy policy objectives by increasing energy efficiency, developing more clean energy resources, using demand-side management and resources, and developing more transmission capacity. The strategy includes specific policy recommendations associated with energy use in buildings, industry, transportation, clean electricity generation, new large loads, and other cross cutting actions that support emissions targets.

**How We Compare.** Largely due to the Federal Columbia River Power System and other private and publicly owned hydropower facilities in the state, Oregon generally has an electricity resource mix with a lower carbon intensity than states in other regions. Neighboring states like Idaho and Washington also benefit from in-state federal hydropower facilities and have similar or lower carbon intensities than Oregon. Other western states, such as California and Montana, have fewer hydro facilities and correspondingly higher unit carbon intensities.

**Table 1. Electricity Carbon Intensities in Oregon and Neighboring States (2023)**

| State      | In-State Generation | GHG Emissions (Metric Tons X 1000) | Metric Tons CO2 per MWh |
|------------|---------------------|------------------------------------|-------------------------|
| Washington | 102,397,711         | 11,610                             | 0.113                   |
| Oregon     | 64,661,249          | 10,351                             | 0.160                   |
| Idaho      | 20,035,438          | 3,482                              | 0.174                   |
| California | 214,191,383         | 39,594                             | 0.185                   |
| Montana    | 26,872,883          | 11,839                             | 0.441                   |

Washington passed SB 5116 in 2019, which established new goals for reducing carbon emissions in its electricity sector. The bill requires utilities to remove coal from the electricity resource mix consumed in state by 2025 and requires 100 percent of electricity consumed be carbon neutral by 2030. In 2021, Washington also passed SB 5126, which established a carbon emissions cap-and-trade program for Washington’s largest emitting sources and industries, including electric generating facilities. California has a 100 percent clean electricity goal by 2045 and achieved 61 percent clean electricity in 2022.<sup>19</sup> Montana has an economy wide GHG neutrality goal by 2050, and as part of this includes a graduated energy efficiency standard for the state. Idaho has no clean energy targets, but Idaho Power – which serves a portion of customers in Oregon – has pledged to have 100 percent clean electricity by 2045.

<sup>19</sup> This statistic is reported by the California Energy Commission at <https://www.energy.ca.gov/programs-and-topics/topics/renewable-energy/clean-energy-serving-california>.  
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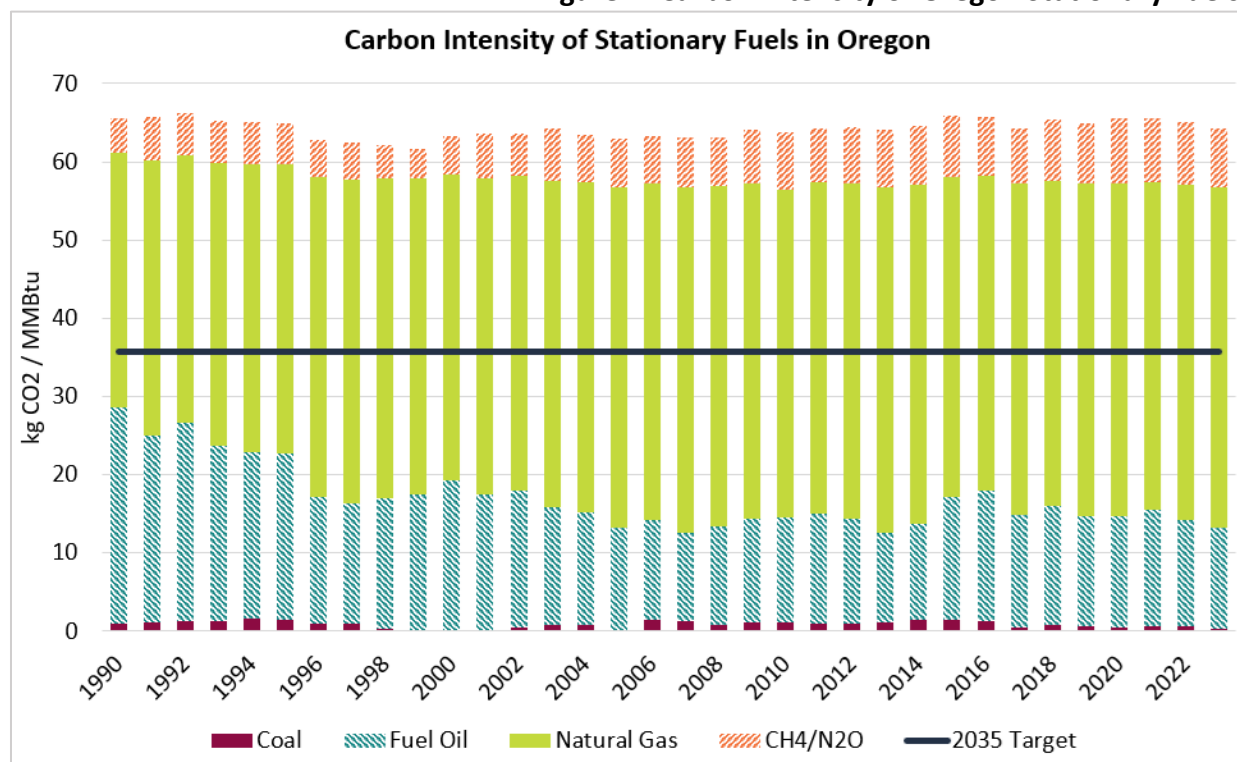
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| KPM #5c     | GREENHOUSE GAS CONTENT OF OREGON'S STATIONARY FUEL: Greenhouse gas emissions per unit of the mix of other stationary fuels used in Oregon.                                                                                                                                                          | Measure since: 2015 |
|-------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|
| Goal        | Assist in meeting Oregon's greenhouse gas emission reduction goals in the state's stationary fuels sector.                                                                                                                                                                                          |                     |
| Data source | Oregon Department of Environmental Quality's Greenhouse Gas Sector-Based Inventory Data 1990-2023, Energy Information Administration's State Energy Data System 1960-2024, Executive Order 20-04, and internal ODOE reports addressing energy modeling, low-carbon fuels, and conservation efforts. |                     |
| Owner       | Heather Sheehan, KPM Coordinator, Phone: 503-480-9951                                                                                                                                                                                                                                               |                     |

## 1. HOW WE ARE DOING

**Results.** Since 1990, the carbon intensity of Oregon's stationary fuels has decreased less than 2 percent, from 65.5 to 64.2 kilograms of carbon dioxide equivalent per million British thermal units (kg/MMBtu) in 2023.<sup>20</sup> Total stationary fuel consumption rose 12.6 percent during that time. Carbon intensive fuel oil use in Oregon declined, replaced by lower carbon intensity natural gas. However, population growth and expansion of natural gas systems meant more natural gas was consumed, which means that emissions from this sector are not meaningfully lower. Oregon's interim target for stationary fuels is 35.7 kg CO<sub>2</sub>/MMBtu by 2035, which is represented by the horizontal line in the chart. Reaching that level would require a 44.5 percent reduction in carbon intensity from 2023, a drop of 28.56 kg CO<sub>2</sub>/MMBtu, which is unlikely without significant policy and market intervention.

Figure 1: Carbon Intensity of Oregon Stationary Fuels



The stationary fuels sector includes most fuels used in Oregon other than those used for electricity generation and transportation. Stationary fuels are commonly used for cooking, heating buildings, and supporting commercial and industrial manufacturing processes, and include

<sup>20</sup> Carbon dioxide equivalent is a measure of all greenhouse gas emissions adjusted to the equivalent amount of carbon dioxide based on the global warming potential of each greenhouse gas.

natural gas, coal, fuel oil for equipment, methane (CH<sub>4</sub>) in biogas and renewable natural gas, and nitrous oxide (N<sub>2</sub>O) used in some industrial applications. Bars in the visualization above reflect these sources from bottom to top as listed in the key from left to right. This data set captures fuel combustion emissions from these specific fuels but does not include the emissions from the combustion of woody biomass, municipal or agricultural waste, wildfires, or some manufacturing processes (for example iron and steel production or semiconductor manufacturing) that produce emissions beyond fuel combustion.

### **About the Target.**

Carbon intensity is a measure of the amount of greenhouse gas emissions per unit of energy. ODOE derived the 2035 interim intensity target from the GHG reduction goals in ORS 468A.205 and Oregon Department of Environmental Quality's sector-based GHG inventory.<sup>21</sup> Total stationary fuel emissions and Btu of energy for 1990 were calculated to establish a baseline and set a target equal to a 45 percent reduction from that baseline.<sup>22</sup> The target is not a statutory requirement and depending on reductions achieved in other sectors, stationary fuels may ultimately need to contribute more or less to meet statewide goals.

### **About the Data.**

Tracking emissions from stationary fuel use is based on data from Oregon Department of Environmental Quality's Greenhouse Gas Reporting Program and the U.S. Department of Energy's Energy Information Administration. Reported consumption and emissions from parts of the industrial sector and fossil fuel suppliers are combined with modeled emissions for residential and commercial buildings and small manufacturers. DEQ continuously improves data and methods, so energy and emission estimates for 1990–2023 can shift modestly over time. EIA's State Energy Data System is also used to determine the CO<sub>2</sub>e/MMBtu of stationary fuels consumed and emissions estimates of neighboring states.

## **2. FACTORS AFFECTING RESULTS**

**Background.** Significantly reducing the carbon intensity of stationary fuel used in Oregon will require a large-scale shift from fossil fuels to low- or no-carbon fuels. For example, this could involve replacing fossil natural gas with renewable natural gas, which is methane biogas emitted from decomposing food waste, agricultural manure, landfills, and wastewater treatment plants. Oregon produces some renewable natural gas, although currently most is used as a transportation fuel or for onsite electricity generation. Renewable natural gas and other biofuel production is also significantly more expensive than fossil fuel production. Zero-emission fuels like hydrogen generated from water and clean electricity could further reduce stationary fuel carbon intensity, but clean hydrogen and other zero-emission fuels are not widely commercially available.<sup>23</sup>

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<sup>21</sup> Oregon Department of Environmental Quality's Greenhouse Gas Sector-Based Inventory Data, Accessed August 2026, [Department of Environmental Quality : Oregon Greenhouse Gas Sector-Based Inventory Data : Action on Climate Change : State of Oregon](#)

<sup>22</sup> This was based on a calculation of the 1990 value available from DEQ in 2016. This value has been updated since then, and would now be calculated as 36 kg CO<sub>2</sub>/mmBtu. For consistency, ODOE has not updated this target. Future iterations of this report may update this value and/or develop a new value based on Oregon Department of Environmental Quality's Climate Protection Program carbon cap which will rely on a different specified baseline.

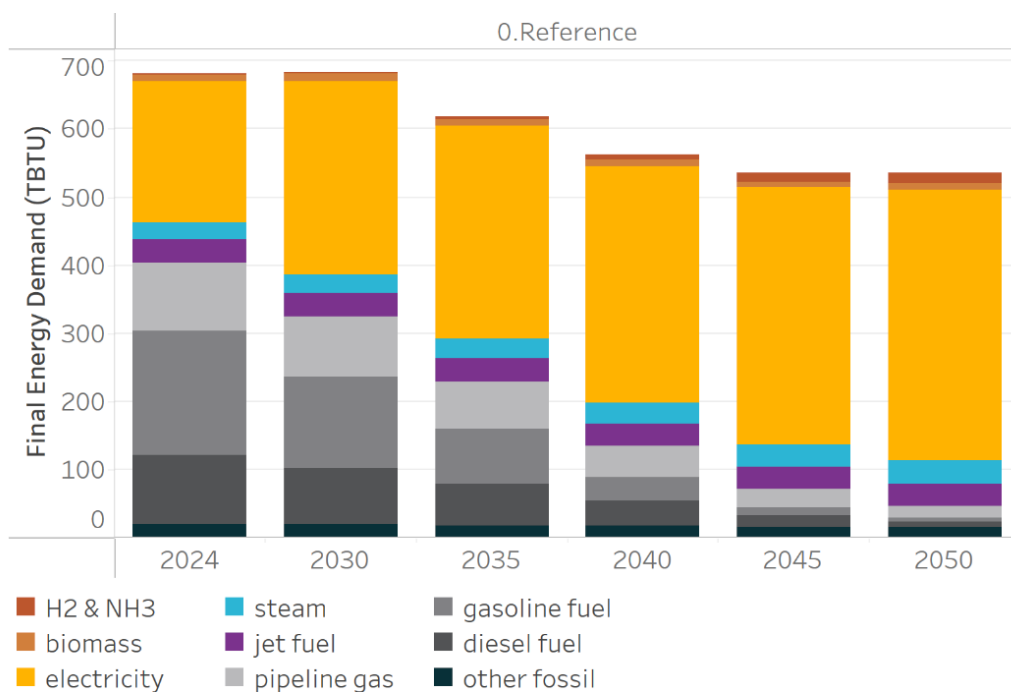
<sup>23</sup> See Oregon Department of Energy's [Renewable Hydrogen Study](#).

The Department of Environmental Quality’s Climate Protection Program will drive down the carbon intensity of stationary fuels over time by establishing a declining cap on GHG emissions from fossil fuels used in Oregon. Under this framework, fuel suppliers, utilities, and large consumers must adopt compliance strategies that lower emissions, including transitions to cleaner fuel options. Natural gas utilities are responding by developing plans to assess and procure more low-carbon fuels.

Significant progress on this KPM may not occur in the next decade, even as progress is being made in reducing overall emissions from stationary fuels. The economywide energy modeling that informed the Oregon State Energy Strategy provided insight into the least-cost pathways to meeting our state’s energy objectives. While modeling results are not a forecast or a specific plan to achieve the goals, they point to electrification and energy efficiency as the lowest cost actions to reduce emissions from fuels, and this is happening today through energy efficiency programs and increasing adoption of heat pumps. Electrification and energy efficiency reduce total emissions but have no effect on stationary fuels carbon intensity because these reductions are not directly tracked nor easily incorporated in this KPM calculation. The Energy Strategy also found that use of low-carbon fuels is one of the 5 pathways to meet state climate and energy goals. This KPM tracks progress on this pathway, although low-carbon fuels are not anticipated to be major contributors to stationary fuels until the 2040s, notwithstanding changes in fuel economics or technological innovations that have a strong influence on this timeline.

**Figure 2: Oregon Energy Strategy Modeling Results for Future Fuel Energy Demand by Fuel Type<sup>24</sup>**

Energy Demand by Fuel in Oregon



<sup>24</sup> Oregon Department of Energy, Oregon Energy Strategy Technical Report, July 2025, [Technical Report for the Oregon Energy Strategy July 2025](#)

The industrial sector is expected to drive the greatest need for low-carbon fuels. Industrial demand, particularly for high-heat and process loads, declines very little in the modeling because many applications cannot easily or cost effectively electrify. Oregon industry will likely rely more on transitioning to low-carbon fuels that are not yet available at scale. The least cost pathway for stationary fuel decarbonization as modeled for the Energy Strategy shows the greatest uptake in low-carbon, direct use fuels is expected in the industrial sector.<sup>25</sup>

### **How We Compare.**

Oregon's stationary fuel mix in 2024 is estimated to have a carbon intensity of 55.68 kg/MMBtu. This value is comparable to those of neighboring states, with Washington at 55.84 kg/MMBtu and California at 55.37 kg/MMBtu. These similarities reflect the fact that the three states rely on comparable fossil fuel resources and use those fuels in similar ways.

ODOE uses fuel consumption and GHG estimates from the U.S. Department of Energy's State Energy Data System to calculate the statewide carbon intensities for direct use fuels in other states.<sup>26</sup> While SEDS provides a consistent and useful national dataset, it does not offer the same level of detail or accuracy as DEQ's Greenhouse Gas Sector-Based Inventory Data that ODOE uses to calculate Oregon's direct use fuels carbon intensity. For example, SEDS reports only carbon dioxide emissions and does not account for methane or nitrous oxide released during fuel combustion.

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<sup>25</sup> Oregon Department of Energy, Oregon Energy Strategy Technical Report, July 2025, [Technical Report for the Oregon Energy Strategy July 2025](#)

<sup>26</sup> EIA GHG emissions estimates are consistently lower than Oregon Department of Environmental Quality's Greenhouse Gas Sector-Based Inventory Data, but we only have that data for Oregon. We use EIA state emissions data to demonstrate the relative difference between states.

| KPM #6      | Transportation Fuels Used in Oregon – Percentage of petroleum vs. non-petroleum fuels used for on-road transportation in Oregon                                                                                                                                                                                                                                                                 | Measure since: 2017 |
|-------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|
| Goal        | Diversify the transportation sector fuel used in Oregon so at least 45% of fuels come from alternative resources rather than fossil fuels by 2035.                                                                                                                                                                                                                                              |                     |
| Data source | Energy Information Administration State Energy Data Systems, U.S. Department of Energy, U.S. Department of Transportation Federal Highway Administration, Oregon Department of Transportation motor vehicle fuel taxable distribution reports, Oregon Department of Environmental Quality Clean Fuels Program, Clean Cities annual surveys, Oregon Department of Energy survey of large fleets. |                     |
| Owner       | Heather Sheehan, KPM Coordinator, Phone: 503-480-9951                                                                                                                                                                                                                                                                                                                                           |                     |

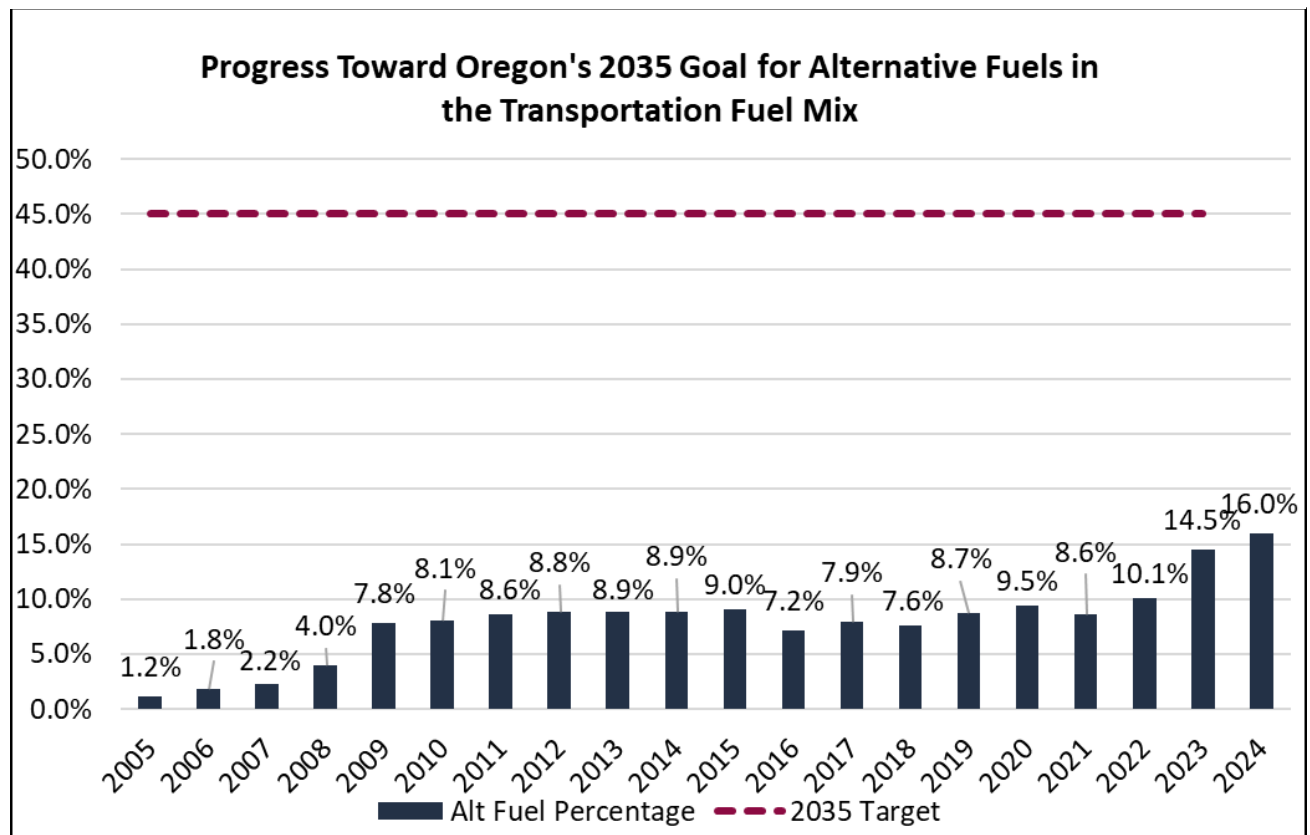
## 1. HOW WE ARE DOING

**Results.** The percentage of alternative fuels consumed in Oregon is increasing. The effects of the COVID-19 pandemic on the economy caused a brief downturn from 2020 to 2021, but as the economy recovered and existing alternative fuel related programs made progress on their goals, consumption nearly doubled from 2021 to 2024. Renewable diesel continues to be the largest contributor to alternative fuel use, showing the largest growth in volume between 2022 and 2024, far surpassing the increases seen in biodiesel, electricity, or ethanol during the same period.

Gasoline and diesel remain the primary transportation fuels used in Oregon, although there continue to be signs that Oregon may be nearing peak use. In 2025, gasoline consumption held steady at about 1.35 billion gallons, consistent with 2024 and still roughly 14 percent below

2019 levels, continuing a trend of reduced gasoline consumption in Oregon. Diesel consumption in 2025 rose to 605 million gallons, up from

**Figure 1. Alternative Fuels Consumption in Oregon's Transportation Fuels Mix**



2024 and 2023. This follows a sharp 22 percent drop in diesel use in 2023 compared to 2022 as Oregon's economy returned to a more normal state after the effects of the COVID-19 pandemic.

**Our Strategy.** Lower-carbon transportation fuels are essential to meeting Oregon's greenhouse gas reduction goals. ORS 468A.205 sets a target of reducing emissions 75 percent below 1990 levels by 2050, and Oregon Governor's Executive Order 20-04 strengthens this to 80 percent by 2050 with an interim goal of a 45 percent reduction by 2035. The Oregon Climate Action Commission emphasizes that all emitting sectors must contribute, and transportation as Oregon's largest source of emissions must play a central role. Achieving these reductions will require coordinated action across state agencies, fuel producers, utilities, local governments, and transportation system users, as well as progress in policy, infrastructure, markets, and travel behavior.

A range of Oregon policies and programs support the transition to lower-carbon transportation fuels, including:

- Oregon Renewable Fuel Standard – requires most gasoline to be blended with 10 percent ethanol per gallon and standard diesel blended with 5 percent biodiesel per gallon.
- DEQ Clean Fuels Program – reduces the carbon intensity of transportation fuels through a market-driven credit-based system that incentivizes lower carbon alternative fuel use by requiring a 10 percent reduction in average carbon intensity from 2015 levels by 2025 followed by a 20 percent reduction by 2030 and 37 percent by 2035.
- Advanced Clean Cars I rule – required an increasing minimum percentage of ZEVs to be delivered to Oregon for sale in each year of the program. In 2022, Oregon adopted the Advanced Clean Cars II rule.
- Advanced Clean Cars II rule – requires an increasing percentage of ZEVs to be delivered to Oregon for sale beginning with 35 percent for the 2026 vehicle model year and culminating with a 100 percent ZEV sales requirement in 2035.
- Advanced Clean Trucks rule – requires manufacturers to deliver increasing numbers of zero emission medium- and heavy-duty trucks starting with the 2025 model year; DEQ has paused enforcement for the 2025 and 2026 model years but intends to resume implementation.
- Oregon State Energy Strategy – identified use of low-carbon fuels and electrification as two of the five pathways needed to achieve state energy and climate goals. ODOE is implementing the strategy, including making progress on actions in support of lower carbon fuel use.
- Transition of DAS bulk fuel purchases from B5 and B20 diesel to renewable diesel when and where available.
- SB 1044 (2019) established goals for zero-emission vehicle adoption in Oregon through 2035.
- SB 2027 (2021) increased state ZEV procurement goals to 100 percent by January 1, 2025.
- DEQ's Electric Vehicle Rebate Programs support consumer and commercial adoption of light-, medium-, and heavy-duty ZEVs.
- ODOT's Transportation Electrification Infrastructure Needs Analysis (2021) – identified electric vehicle charging infrastructure needs necessary to meet the state ZEV adoption targets.
- *Every Mile Counts* initiative led by ODOT, with collaborating agencies ODOE, DEQ, and DLCD – coordination of statewide transportation emissions-reduction strategies.
- Participation in multiple international and interstate agreements and pledges to support increased zero-emission vehicle adoption.

- The Oregon State Energy Strategy found that electrification and low-carbon fuels were two of five key pathways needed to achieve the state's climate goals and energy objectives. The strategy includes multiple actions to support the availability and use of zero-carbon and low-carbon fuels.

**About the Targets.** This Key Performance Measure was designed to show progress in reducing emissions across all fuel consumed in Oregon, rather than progress on specific targets established in the policies listed above. The target of at least 45 percent of on-road transportation fuels coming from alternative resources by 2035 was estimated by the Oregon Department of Energy as a proxy for achieving state program targets influencing alternative fuel uptake. Under Oregon's Clean Fuels Program, the state is targeting a 37 percent reduction in the carbon intensity of all transportation fuels by 2035, effectively driving a substantial shift toward alternatives like renewable diesel, ethanol, electricity, and renewable natural gas. Considering transportation electrification targets set in the Advanced Clean Cars II and Advanced Clean Trucks rules is expected to drive more electricity transportation fuel use, ODOE estimated that a target of 45 percent of all fuel consumed in Oregon would align with these various targets.

**About the Data.** This KPM calculates the percentage of alternative fuels in the on-highway transportation sector on a gasoline gallon equivalent basis. This makes it possible to compare one fuel to another in quantity. The data provide a snapshot of total alternative fuels measured in gasoline gallon equivalents consumed in the on-road transportation sector and are from the Oregon Department of Environmental Quality's Clean Fuels Program. Prior to the implementation of the Oregon Clean Fuels program, ODOE assessed liquid biofuels using various data resources. Since 2016, ODOE uses DEQ's Clean Fuels program data to assess fuel demand. Because the sources of data have differences in how they are collected, the resulting trend line had an artificial decline between 2015 and 2016.

Electric motors are much more efficient than internal combustion engine vehicles; this efficiency is not accounted for in this KPM. Overall, on-road electric vehicles are about 3.4 times more efficient than comparable internal combustion engine vehicles. This means it requires less overall energy to drive the same distance in an electric vehicle than a non-electric vehicle.

## 2. FACTORS AFFECTING RESULTS

**Background.** In 2005 gasoline and diesel accounted for 98.8 percent of the fuel consumed in the on-road transportation fuel mix, with only 1.2 percent coming from alternative fuels. Since then, a series of state and federal policies and programs have steadily expanded the use of lower carbon alternative fuels. Beginning in 2007, federal and state Renewable Fuel Standards began requiring blending ethanol into gasoline and biodiesel into diesel, increasing the presence of biofuels in the market. The launch of Oregon Clean Fuels Program in 2016 accelerated this transition by driving significant growth of renewable diesel and electricity as substitutes for fossil fuels. Additional programs described above continue to expand access to electric vehicles, and electricity as a transportation fuel is expected to grow substantially in the decade ahead.

Renewable diesel is currently the main driver of growth in Oregon's alternative fuel use. Consumption increased from 9.9 million gallons in 2021 to 171.6 million gallons in 2024. Renewable diesel is in high demand because it works in existing vehicles and fueling systems, performs well in cold weather, and reduces maintenance costs. Availability remains the biggest barrier, as supplies are still concentrated in major metro areas and along key travel corridors. The nearest renewable diesel refinery to Oregon is BP's Cherry Point refinery in Washington, which

produces about 7,000 barrels per day and roughly 2.6 million barrels annually. However, NEXT Renewable Fuels Oregon (NXTClean Fuels) has proposed to build a refinery in Port Westward. Local and state authorities have issued the required permits, and the project now awaits final permitting action from the U.S. Army Corps of Engineers.<sup>27</sup> Once approved, the facility is expected to significantly expand in-state availability of renewable diesel and other clean fuels.

Electricity continues to grow as a transportation fuel in Oregon, increasing from 157,330 MWh to 396,389 MWh from 2021-2024. As of May 2026, electric vehicles represent 3.75 percent of light-duty registrations in the state. Upfront vehicle costs, limited familiarity with EV technology, and gaps in charging availability and reliability (a.k.a., range anxiety) remain key barriers to broader adoption. DEQ's Oregon Clean Vehicle Rebate Program has issued more than 33,000 rebates as of April 2025 and will expand support for low-income households through EPA's Climate Pollution Reduction Grants through September 2029. However, actions at the federal level appear to be stifling growth in electric vehicles. The One Big Beautiful Bill Act ended federal new and used EV tax credits for passenger and commercial vehicles after September 2025, leaving only the EV charger credit available through mid-2026. Oregon was able to secure most previously allocated federal funding for charging infrastructure, including NEVI corridor buildout, the Community Charging Rebates Program that has funded nearly 350 new Level 2 stations to date statewide, and federal EV Charger Reliability and Accessibility Accelerator upgrades, though some federal funds face still face uncertainty.

Additional federal actions propose to limit policy options Oregon and other states rely on to make progress on climate and transportation goals. In June 2025, the Trump Administration and Congress used the Congressional Review Act in an attempt to revoke EPA waivers authorizing California's Advanced Clean Cars II and Advanced Clean Trucks regulations, creating uncertainty for states such as Oregon that have adopted those vehicle emissions standards. Oregon joined a multi-state legal challenge to the action. If upheld, the revocation would prevent Oregon from enforcing these regulations and is likely to significantly slow EV adoption in the state. DEQ has issued enforcement discretion for both the ACCII and ACT rules, meaning DEQ will not pursue enforcement or assess penalties against vehicle manufacturers that do not meet near-term zero-emission vehicle sales targets. For ACCII this includes Model Years 2026 or 2027 for passenger cars and light-duty trucks, and for ACT this includes model year 2025, 2026, or 2027 medium- and heavy-duty trucks.

More state leadership is needed for the state to reach its target of at least 45 percent alternative fuel use by 2035. State policies implemented across state agencies will continue to support greater alternative fuel uptake, but changes at the federal level may suppress progress. Continued support for existing programs is necessary, and the state should consider supporting additional actions including those in the Oregon State Energy Strategy to make additional inroads on this KPM.

**How We Compare.** Oregon remains one of the strongest performers nationally: its EV share of new vehicle sales is well above the U.S. average and the state is generally among the top 10 states for EV sales. Oregon is also among the nation's highest users of renewable diesel, second only to California along the West Coast. Oregon also currently ranks 18th (up one spot from 2025) in the nation for public EV charging stations,

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<sup>27</sup> U.S. Army Corps of Engineers. (n.d.). U.S. Army Corps of Engineers Portland District Website – NEXT Renewable Fuels Oregon Environmental Impact Statement. Accessed September 9, 2026. <https://www.nwp.usace.army.mil/Missions/Regulatory/NEXT-Renewable-Fuels-EIS/emci/83766635-27f6-f011-8d4c-0022482d279b/emdi/ea000000-0000-0000-000000000001/>.

with 1,988 stations statewide, and has unusually strong rural coverage due to targeted investments such as ODOT's Community Charging Rebates Program, which funded 263 stations in rural or disadvantaged communities as of July 2026.<sup>28</sup>

When adjusted for population, Oregon's charging network is even more competitive. With roughly 4.3 million residents, Oregon has one public EV charging station for every 2,160 people—placing the state in the upper tier nationally and ahead of many larger states with higher station counts but lower per-capita availability. Oregon's per-capita access is comparable to Washington and meaningfully stronger than California, demonstrating relatively broad access to charging infrastructure across the state. This combination of widespread rural access, strong per-capita coverage, and high adoption places Oregon well above national norms in non-petroleum transportation fuel use.

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<sup>28</sup> Oregon Department of Transportation. (2026, July 20). *EV charger rebate program awards \$10.9 million, funds nearly 350 new charging stations over three years*. Oregon Department of Transportation Climate Office. <https://content.govdelivery.com/accounts/ORDOT/bulletins/42142a6>.

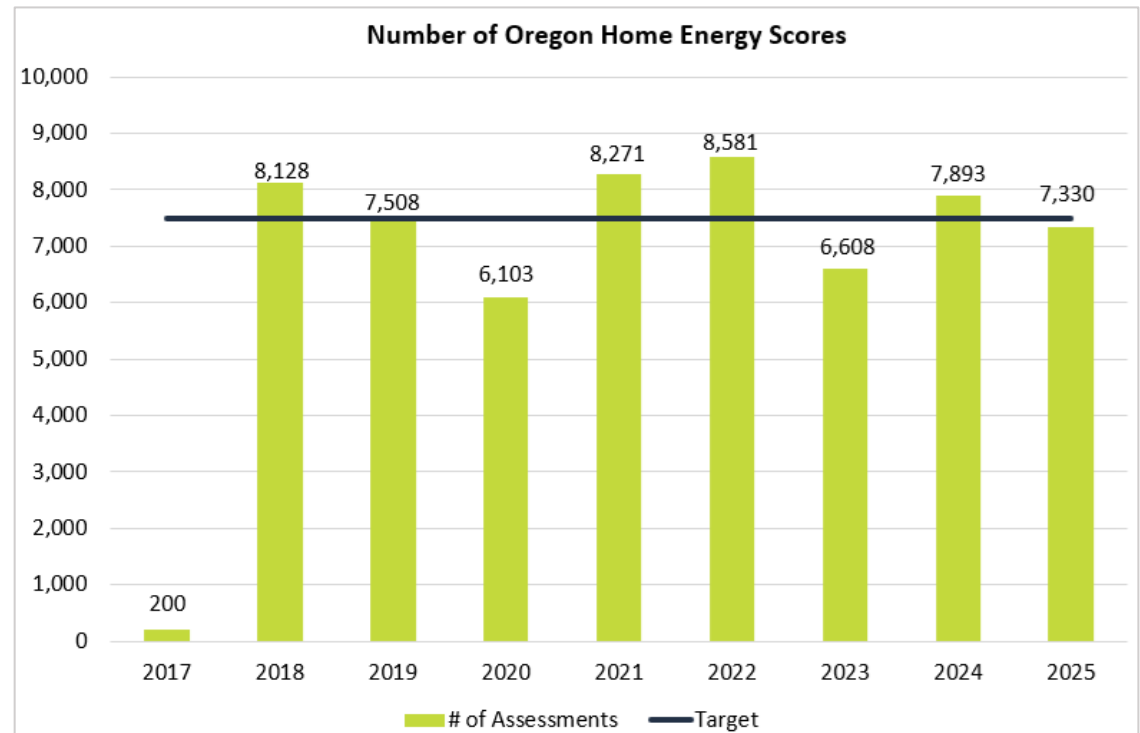
| KPM #7      | HOME ENERGY SCORING: Percent of Oregon population receiving a state-authorized home energy score. | Measure since: 2020 |
|-------------|---------------------------------------------------------------------------------------------------|---------------------|
| Goal        | Increase instances of Oregon-approved home energy scores being conducted within the state.        |                     |
| Data source | USDOE Home Energy Score database.                                                                 |                     |
| Owner       | Heather Sheehan, KPM Coordinator, Phone: 503-480-9951                                             |                     |

## 1. HOW WE ARE DOING

**Results.** Data is reported by calendar year based on data from the U.S. Department of Energy Home Energy Score System. In 2025, there were 7,330 total home energy scores performed in Oregon.

Scoring activity generally follows home sales trends because several Oregon cities require a Home Energy Score when a property is listed for sale. Home sales increased modestly—about 2 to 3 percent—from 2024 to 2025. However, total scoring declined during this period because some cities with mandatory scoring policies relaxed their compliance efforts, reducing the number of scores completed even as sales activity rose.

| Program           | Total Scores in 2025 |
|-------------------|----------------------|
| City of Ashland   | 1                    |
| City of Bend      | 1,618                |
| City of Hillsboro | 959                  |
| City of Milwaukie | 133                  |
| City of Portland  | 4,475                |
| State of Oregon   | 144                  |
| <b>Total</b>      | <b>7,330</b>         |



### About the Target.

This target has historically been set at 7,500 scores per year, which accurately reflected market trends at the time. For years 2026 and 2027, and related to State Energy Program grant metrics, ODOE has set a target of 8,500 Home Energy Scores per year. This number was derived from examining the average number of HES delivered, per year, between 2018 and 2023; this number is 7,533. That average draws upon data from

Milwaukee, Portland, and Hillsboro. We then queried informal sources of real estate data for Bend, the most recent city to adopt a mandatory scoring policy, and one that came fully online in 2024. In 2023, around 1,500 homes were sold in Bend. Other data suggested that the Bend market is quite fluid, with certain months of 2023 showing a 40 percent decrease from the same month in the previous year. We therefore decided to increase our previous target from 7,500 to 8,500. We feel that the new target accounts for market volatility, additional homes being sold in Bend, and a post-pandemic recovery of overall sales numbers. For the current reporting period, fixed loan interest rates remained higher than the seven-year average and likely affected overall home sales.

**About the Data.** Data is reported by calendar year; this report includes data through 2025. Data is produced through the U.S. Department of Energy Home Energy Score System.

## 2. FACTORS AFFECTING RESULTS

**Background.** The State of Oregon, through the Oregon Department of Energy, has built a statewide framework for residential home energy scoring activity. This framework provides regulations that prescribe necessary credentials for a professional assessor, outlines what must be included in a scoring report, and provides the calculating engine to determine a score. This framework has been essential for Oregon cities that adopt home energy scoring policies – it builds assurances that scoring activity is well supported, accurate, and consistent across the state. To ensure successful interest and uptake, the framework was also developed with the underlying premise that scores and scorecards would be produced at low cost (\$150 to \$250), would include useful consumer information, and would be easy to understand. Comparable programs across the country have a higher cost of \$500 to \$800 per score and include more detailed information than consumers may need.

Improvements to Oregon’s home energy scoring program continue. The current program is limited to single family homes that are owner-occupied. Future developments will enable work to reach rental properties and include scoring structures such as multi-family units and manufactured homes.

**Outreach and Awareness.** To drive the expansion and activity of home energy scoring, ODOE has focused attention on assisting city decision-makers and sharing information about the benefits of energy scoring to improve their energy and climate planning effectiveness. By engaging with cities and providing technical and support resources, ODOE works to overcome significant barriers to widespread adoption of home energy scoring policies. Barriers include:

- City decision-makers may be unaware of energy scoring as an effective option to reduce energy use and consumer utility costs as part of their energy and climate action planning.
- Limited city staff and resources available to develop an energy scoring policy.
- Limited city staff and resources to support on-going home energy scoring program implementation activities.

Stakeholders may raise concerns about the value of the home energy scores compared to the potential costs of implementing a program, so ODOE staff are available to provide expertise and guidance about the benefits of scoring – from energy cost savings to potential greenhouse gas reductions. The response to ODOE’s engagement in home energy scoring has been significant and has led to ongoing discussions and technical

assistance with more than 10 cities. These cities range in population from 6,300 (Talent) to 637,000 (Portland). ODOE has responded to multiple city requests for assistance in developing home scoring policies as part of their energy and climate action planning.

### **3. HOW WE COMPARE.**

Oregon leads the nation in residential scoring activity, as reported by the USDOE Home Energy Score program. Within the USDOE HES program, there have been more than 307,000 scores conducted. Oregon has contributed 63,000 scores, or 21 percent of the total, between 2016 and the time of this report. Many states have scoring systems other than the USDOE HES, which are voluntary and often coordinated and funded by local utility programs. Identifying these voluntary programs is difficult as they are not reported into a national database.

Other states within the U.S. are contacting ODOE for lessons learned in rolling out HES policies and implementation steps. ODOE has assisted Utah, Washington, South Carolina, Maine, and Colorado. ODOE works with the National Association of State Energy Officials and the USDOE to share the methods Oregon uses to drive participation and to hear the latest updates on system improvements.

Oregon's home energy scoring program has been successful thanks to efforts around messaging the benefits of home energy scoring. At its foundation, home energy scoring is a consumer protection effort, helping people understand energy characteristics that affect home operational costs. Some cities only see the benefits of scoring homes to reduce energy consumption and greenhouse gas emissions. However, what seems to resonate with city decision-makers most is the ability to provide clear energy information to constituents to help them in their homebuying decisions. With a home score in hand, a homebuyer is better equipped to make an informed decision and plan steps to improve the performance of the home they select.

**Recognition.** ODOE continues to be recognized as a national leader in home energy scoring, sharing its experience and supporting audiences across the country. The agency contracts with Earth Advantage to operate the HES program in Oregon and leverages Earth Advantage's expertise and extensive national network to strengthen and expand Home Energy Score efforts both within Oregon and in other states.