ALLIANCE
FOR AUTOMOTIVE
INNOVATION

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ELECTRIC VEHICLE QUARTERLY REPORT

THIRD QUARTER, 2025

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ALLIANCE FOR AUTOMOTIVE INNOVATION

THIRD QUARTER, 2025

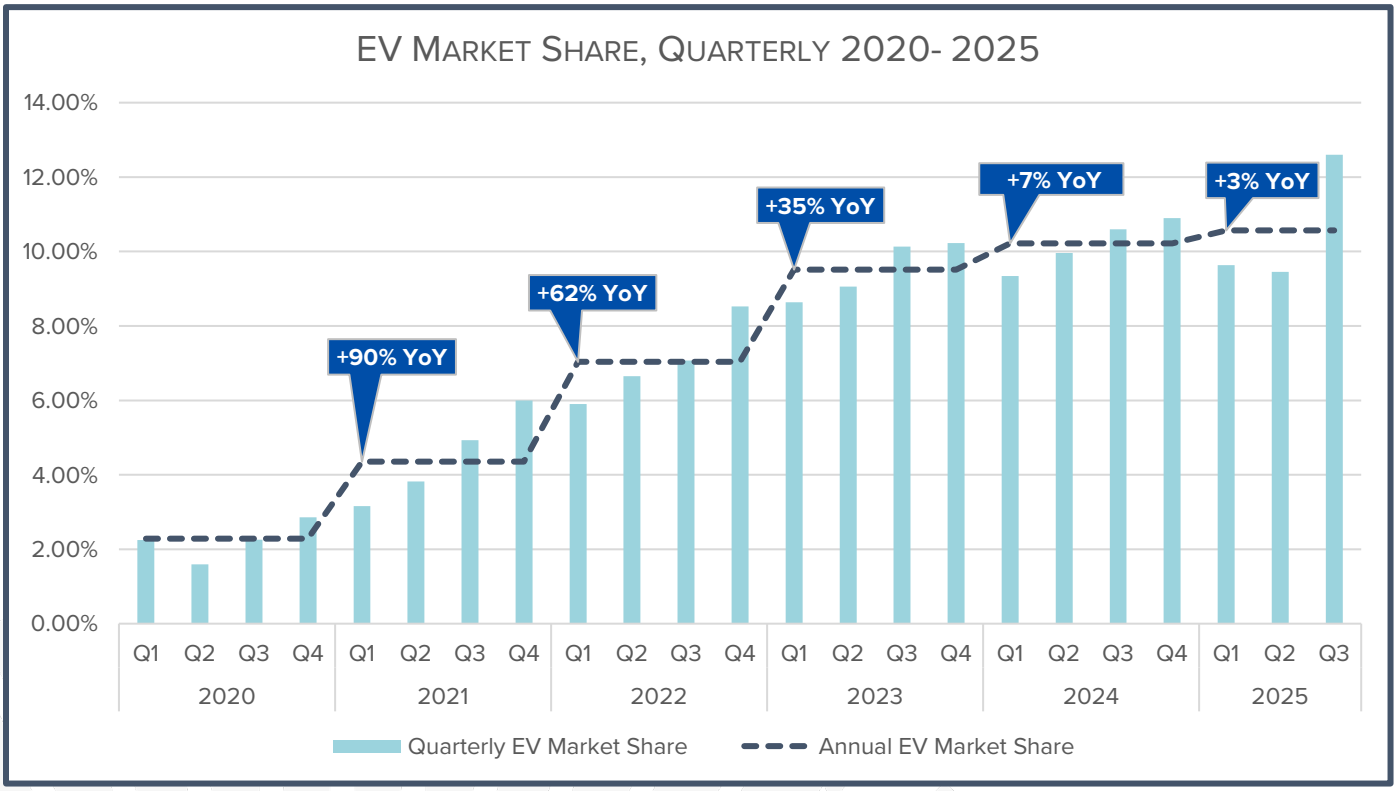
Contents

ELECTRIC VEHICLE SALES OVERVIEW

Editor's Note: Since 2024, federal policies on EVs have shifted dramatically, including the elimination of consumer EV tax credits after September 30, 2025. This Get Connected report is backward-looking, covering the EV market in the third quarter of 2025 – the statutory end of federal EV incentives. Since then, national sales data have shown a dramatic decline in new EV registrations after the pull-ahead sales witnessed in the third quarter. Nevertheless, EVs remain an important part of the U.S. market, both in response to consumer demand and in the larger picture of U.S. global competitiveness. This report continues our commitment to delivering the facts and figures on EV sales and charging infrastructure, and it closes with our spotlight on consumer acceptance of EVs and the role of dealers advancing EV adoption through the dealership network.

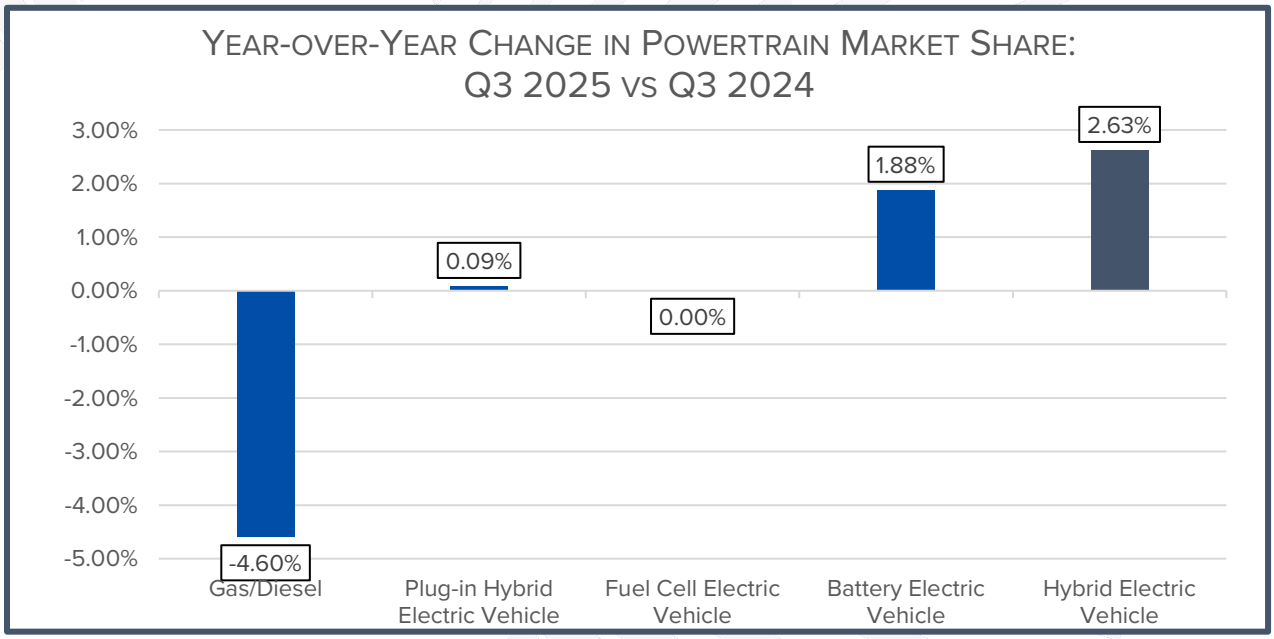
Third Quarter, 2025

In the third quarter of 2025, automakers sold 504,131 electric vehicles (EVs, including battery, plug-in hybrid, and fuel cell electric vehicles) in the United States, representing 12.6 percent of overall light-duty vehicle sales – the highest market share and volume on record. This represents a 3.1 percentage point (pp) market share increase over the second quarter of 2025 amounting to an increase of about 119,000 vehicle sales. Sales in the third quarter represented 40 percent of all EV sales in 2025.



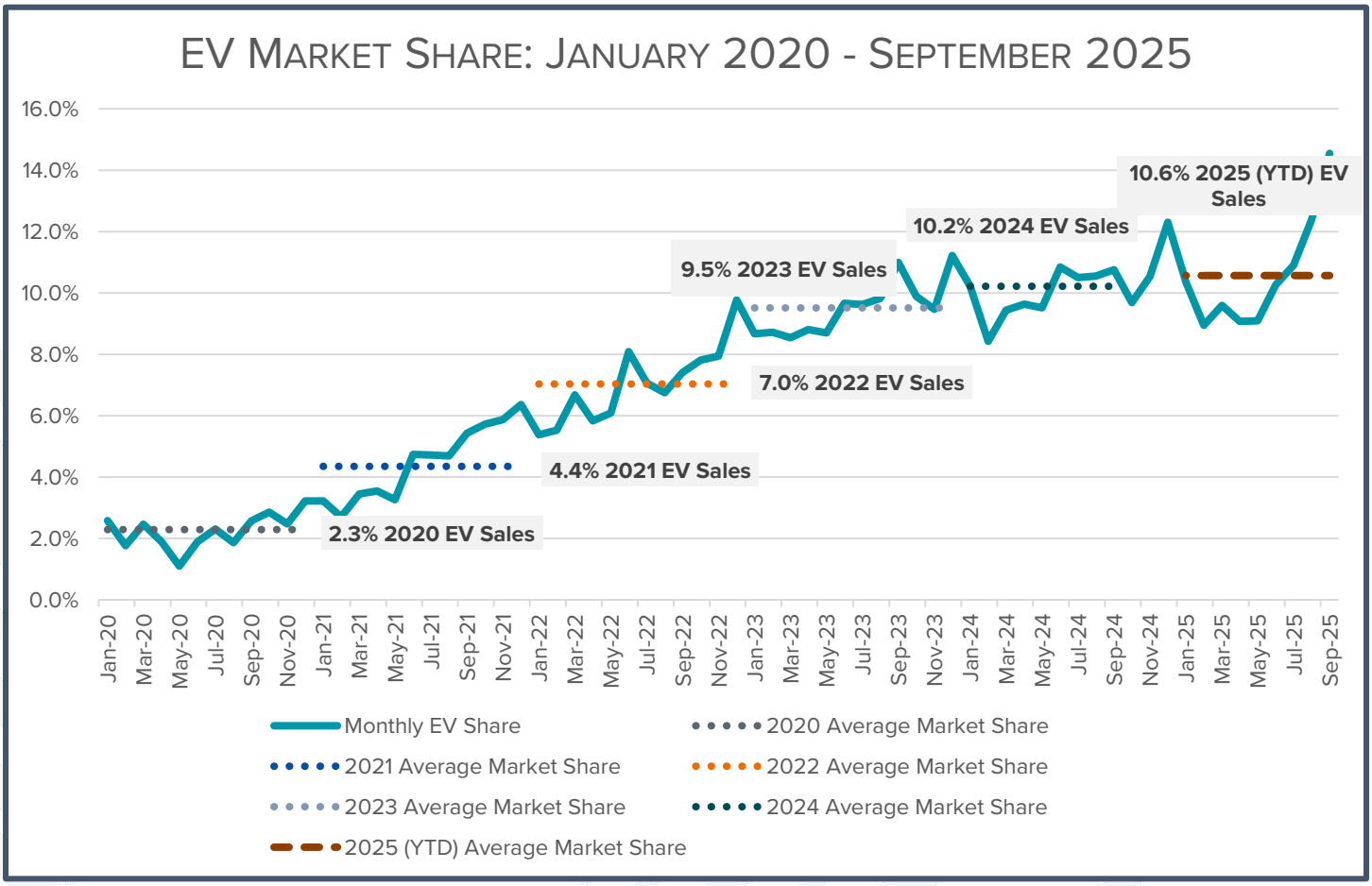
Year-Over-Year (Q3 2025 vs Q3 2024)

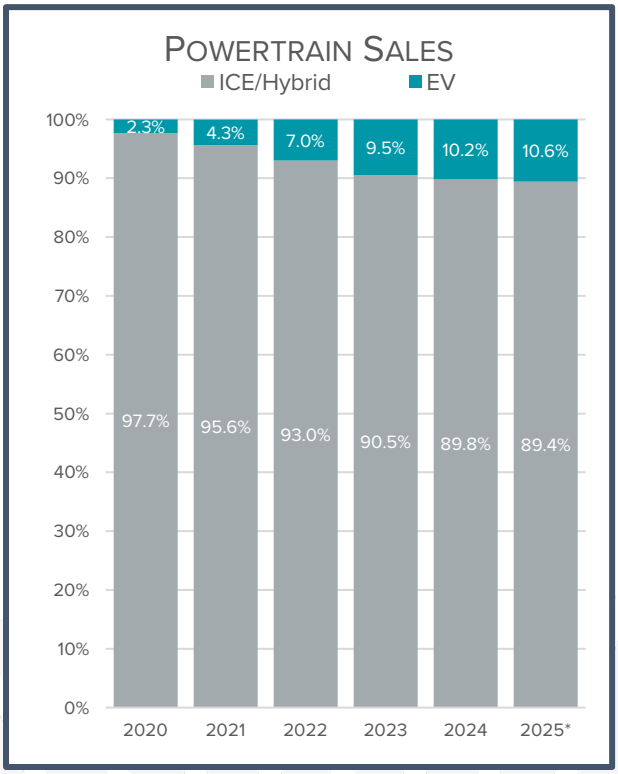
Year-over-year (YoY), EV market share increased 2 pp from the third quarter of 2024. The total volume of all light-duty sales in Q3 2025 increased 3.8 percent over Q3 2024, while the volume for EVs increased 23 percent (an increase of about 94,000 vehicles). For comparison, internal combustion engine (ICE) vehicle market share decreased by 4.6 pp during Q3 2025 compared to the same period last year. Nearly all of ICE market share was displaced by gains of traditional hybrids and BEVs. See more on the evolving market share of powertrains below.

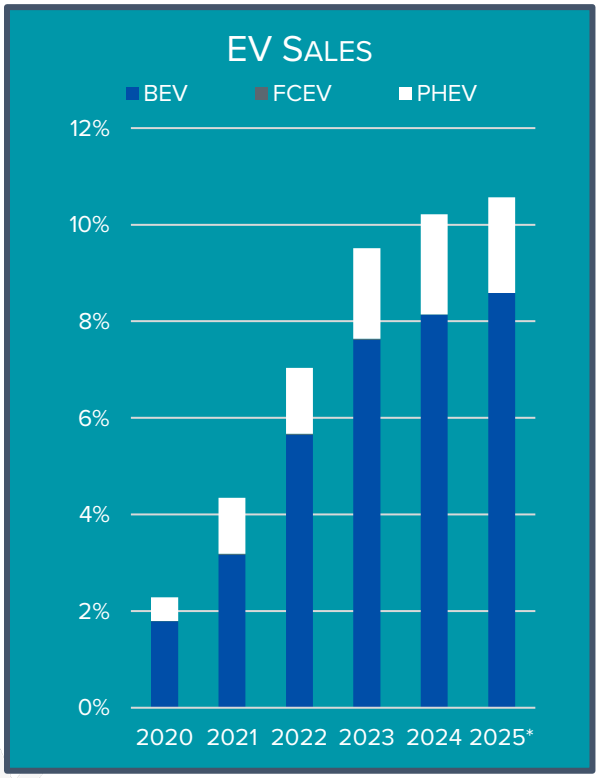


Year to Date (YTD Q3), 2025

Nearly 1,264,865 EVs were sold in the first three quarters of 2025, 10.6 percent of all light vehicle sales and an increased market share of 0.6 pp over the first three quarters of 2024. The total volume of all light-duty sales through Q3 is 4.7 percent above the same period a year ago, while the volume for EVs increased 10.8 percent (an increase of about 124,000 vehicles).



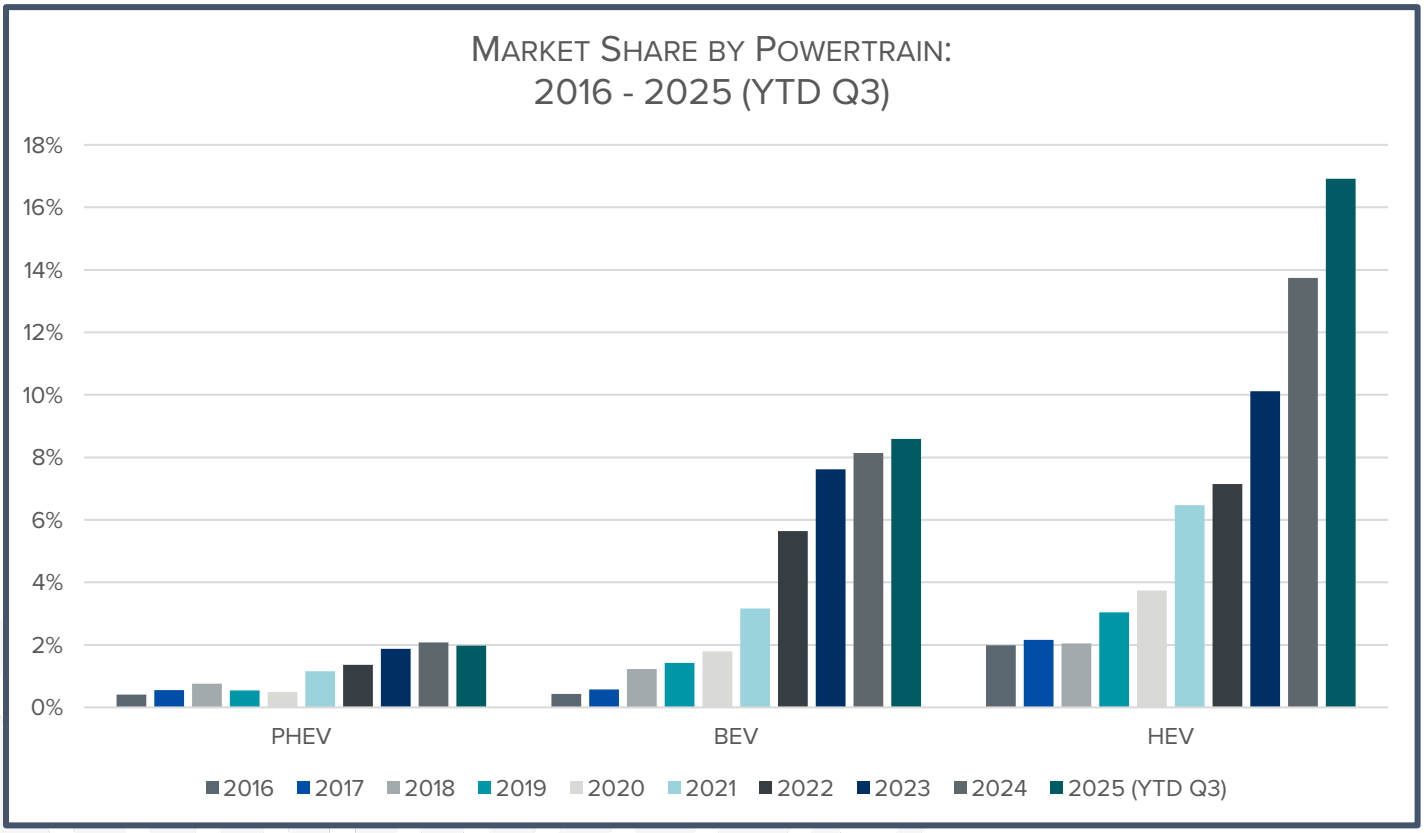




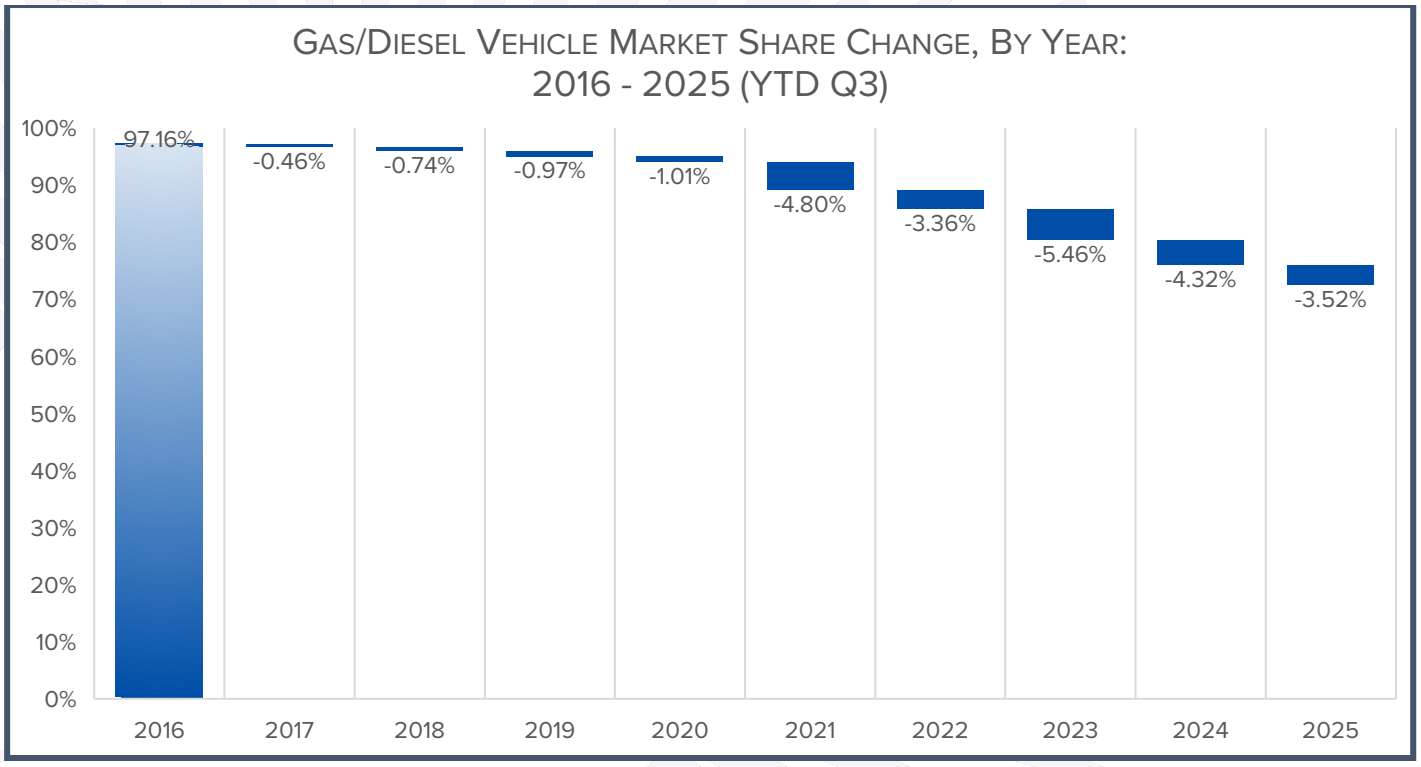
*Year to date, Q3 2025

Evolving Market Share of Powertrains: 2016 - 2025

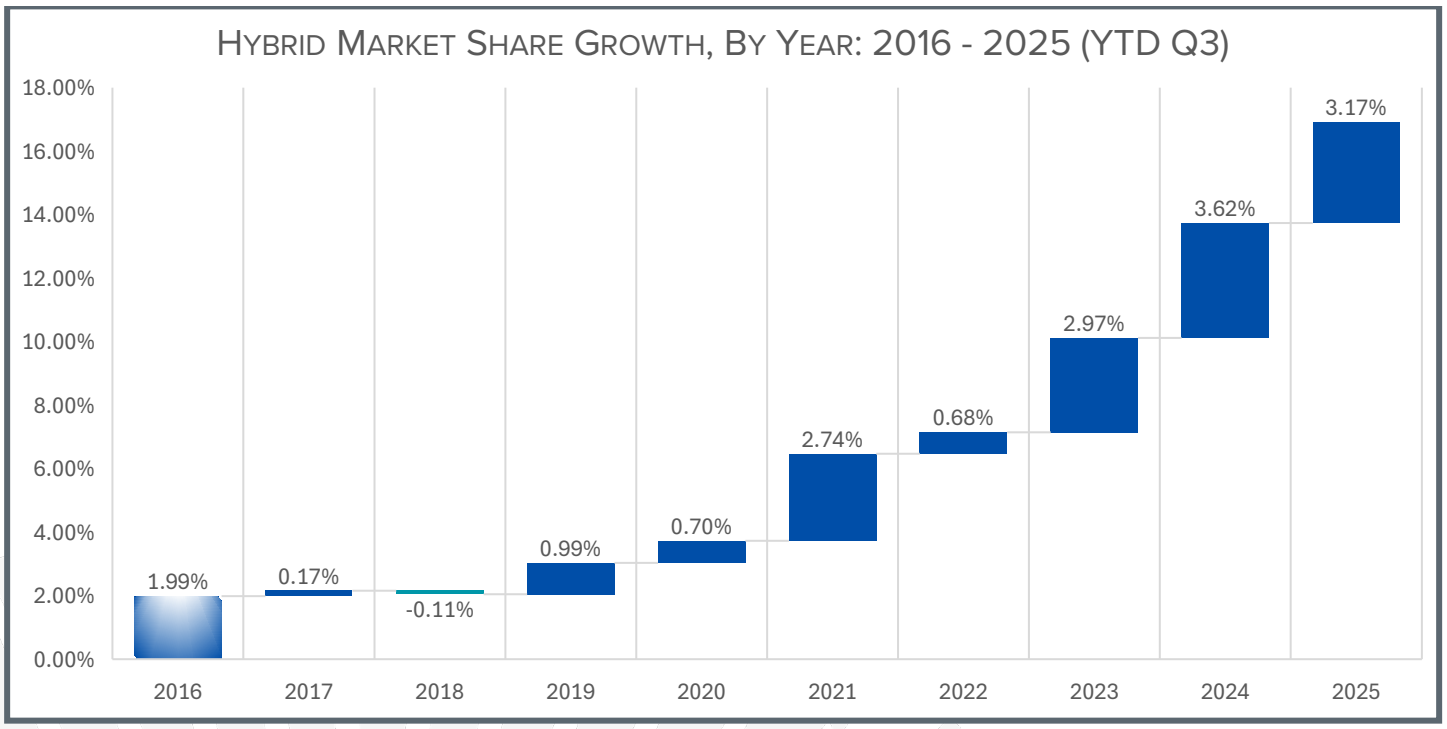
From 2016 through 2025 (Q3), traditional internal combustion engine (ICE) market share steadily declined. In 2016, ICE vehicles comprised more than 97 percent of all vehicle sales. Through the third quarter of 2025, the year-to-date ICE share dropped to 72.5 percent for an overall loss of 24.6 pp. The ICE market share was replaced by increases in share of traditional (mild and strong) hybrids, BEVs, and PHEVs. Traditional hybrids made up most of the alternative vehicle gains (+15 pp) followed by BEVs (+8.2 pp) and PHEVs (+1.6 pp) over the last nine plus years.



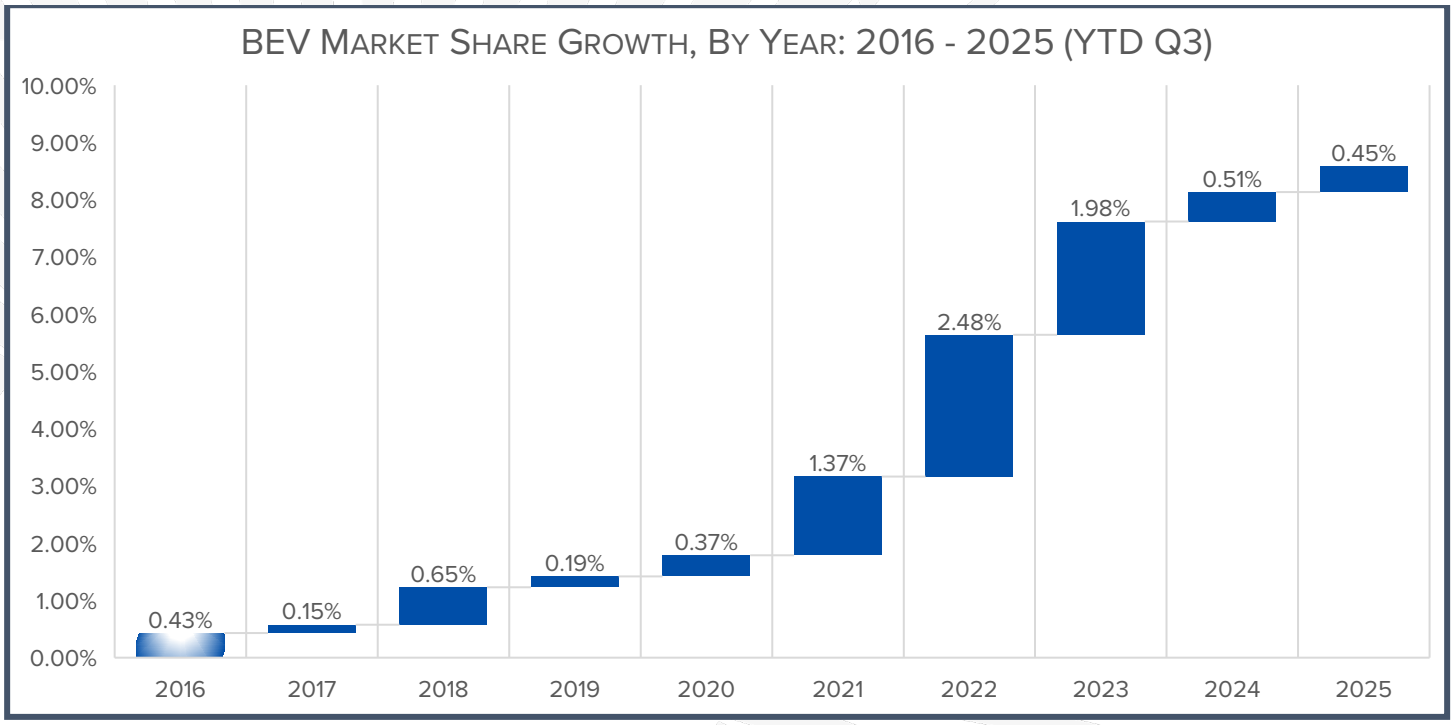
ICE market share decreased from 97 percent in 2016 to 72.5 percent through 2025 Q3 (-24.6 pp):



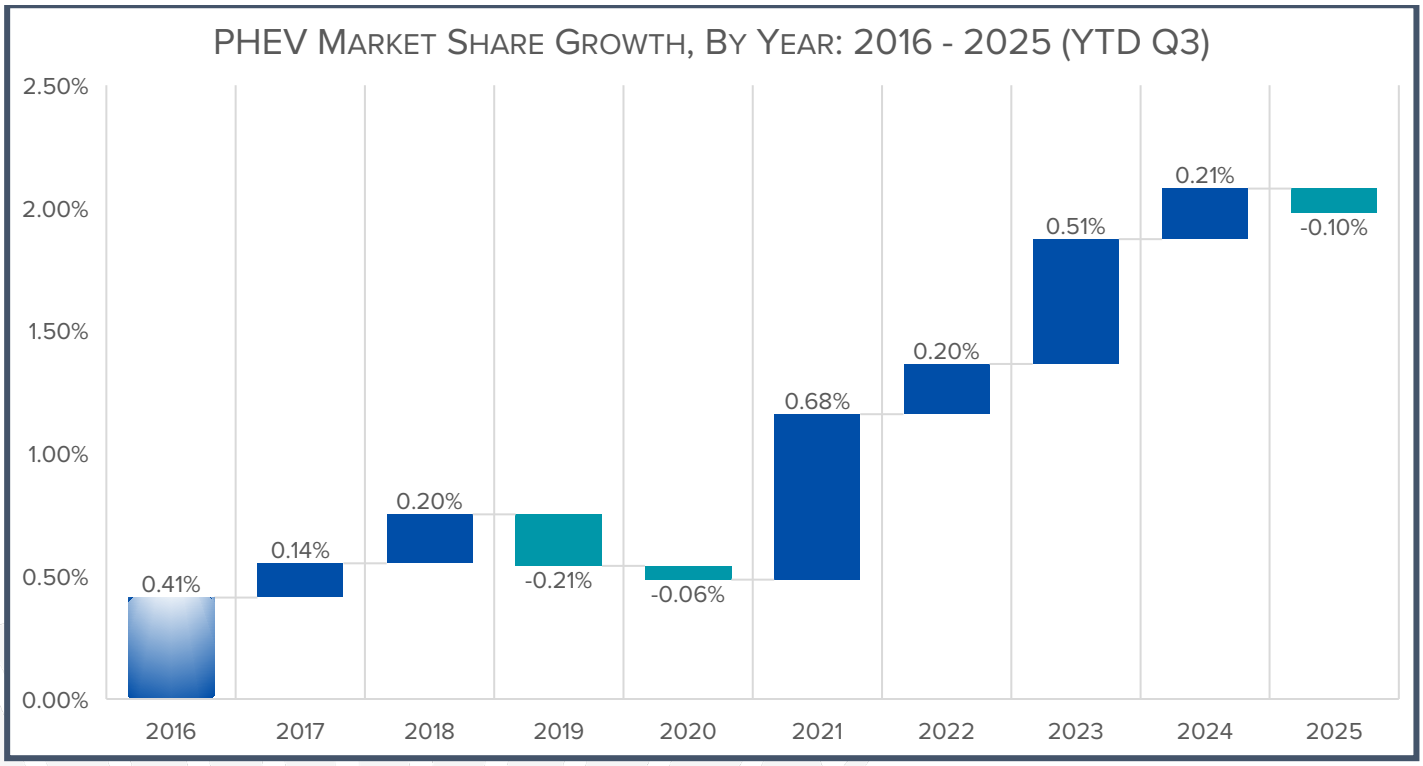
Hybrid market share grew from 2 percent in 2016 to 17 percent through 2025 Q3 (+15 pp):



BEV market share grew from .43 percent in 2016 to 8.6 percent through 2025 Q3 (+8.2 pp):



PHEV market share grew from .41 percent in 2016 to 2.0 percent through 2025 Q3 (+1.6 pp):



See Additional Historic Data on EV Sales Here

Electric Vehicle Sales by Segment

While passenger cars once dominated the EV market, manufacturers continue to introduce new models to satisfy a variety of consumer needs. Utility vehicle (UV) offerings continue to grow, and while electric pickup trucks are a relatively new entry to the market (making their commercial debut in September 2021), there are 6 models available now. As a result, non-car segments are continuing to make gains, and in the third quarter of 2025, light truck (UVs, minivans, and pickups) sales comprised 85 percent of the EV market – the highest share to date.

Quarterly sales of BEV and PHEV UVs have grown from about 19 percent of EVs at the start of 2020 to 78 percent in the third quarter of 2025 (nearly 400,000, the highest ever). Year-over-year, UV sales have increased about 8 pp (about 105,000 more vehicles).

EV Model Availability

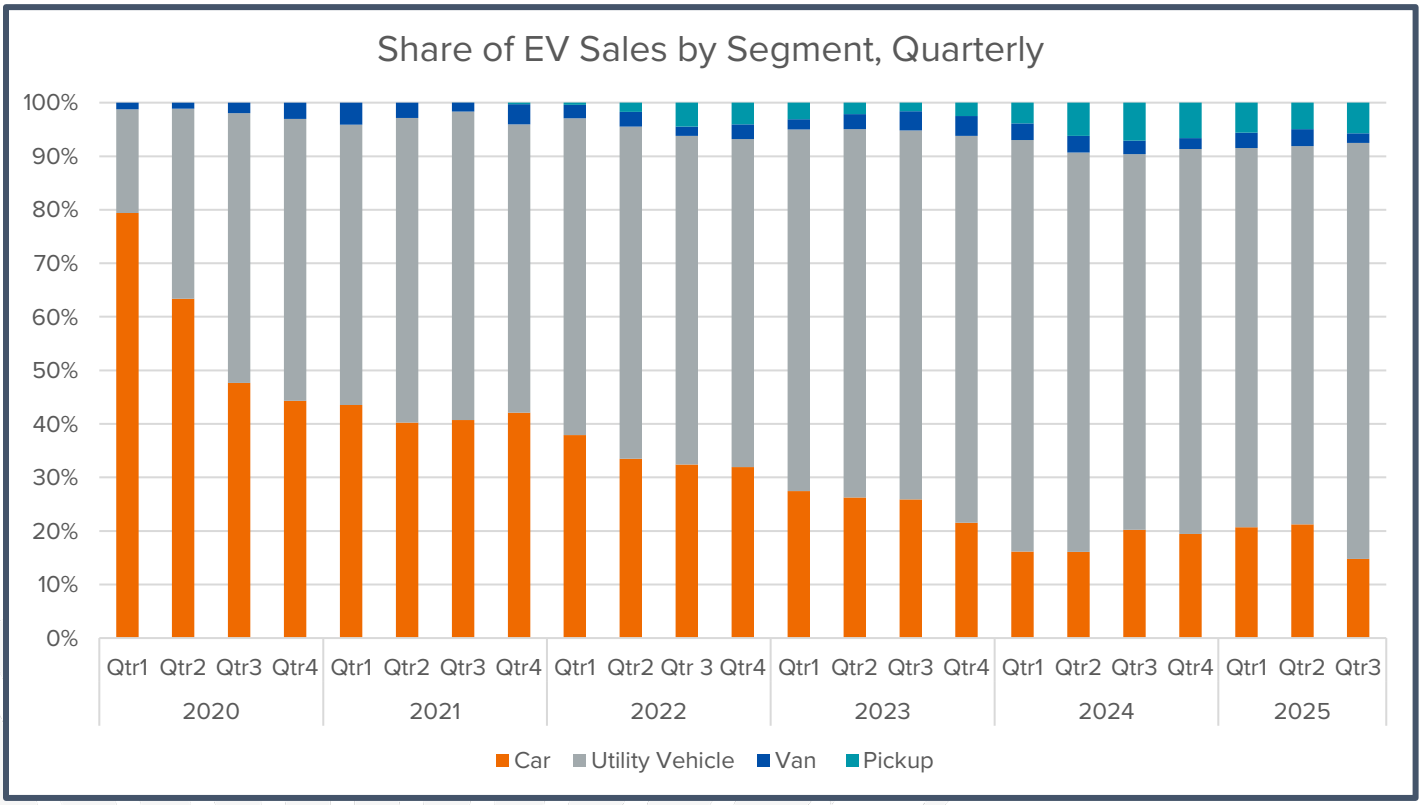
155 Vehicle Models Sold in Q3 2025:

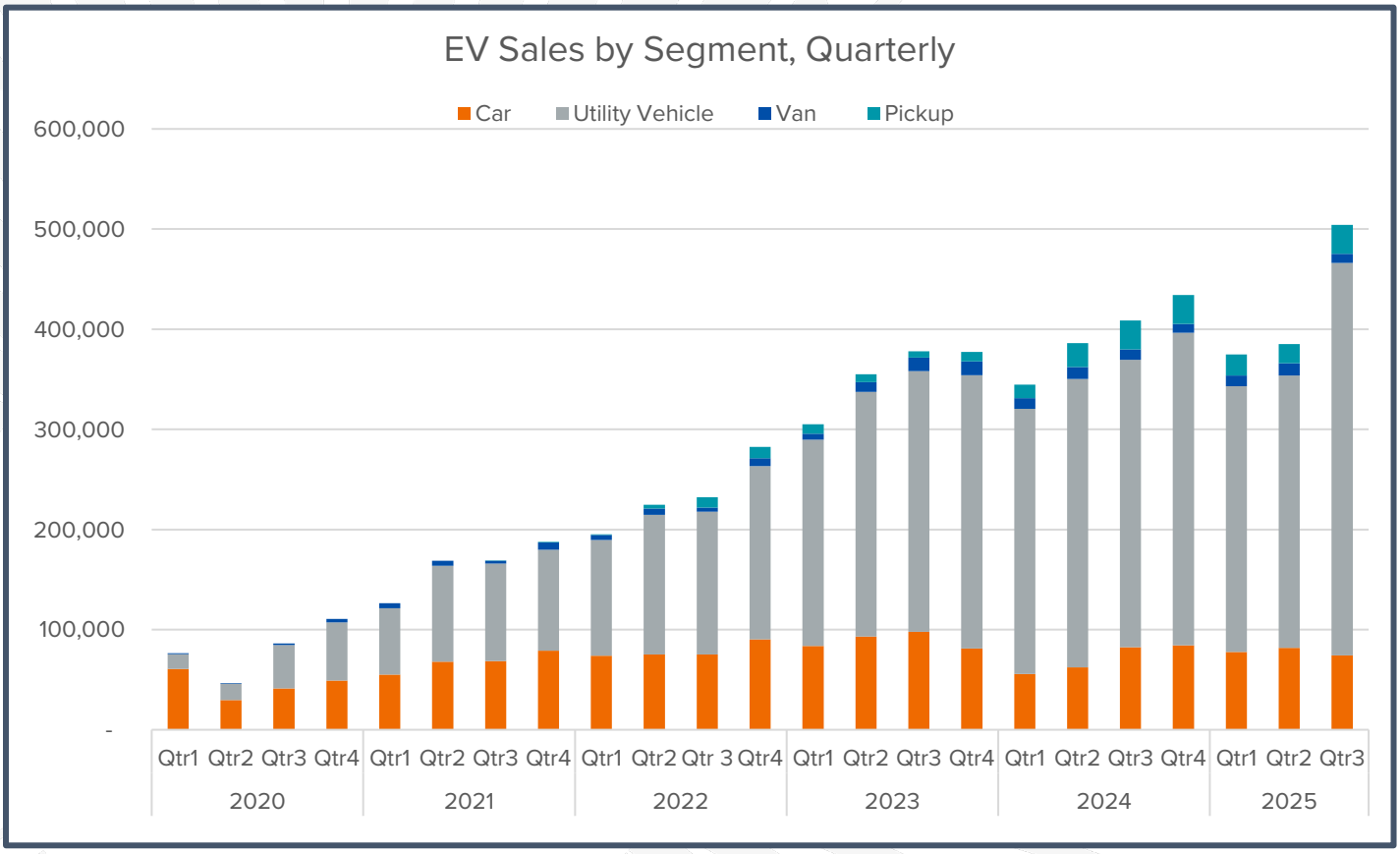
95 Battery Electric Vehicles
- 24 Cars
- 54 Utility Vehicles
- 6 Pickups
- 11 Vans

58 Plug-in Hybrid Vehicles
- 25 Cars
- 32 Utility Vehicles
- 1 Van

2 Fuel Cell Electric Vehicles*
- 1 Car
- 1 Utility Vehicle

**Includes Plug-in Hybrid Fuel Cell*

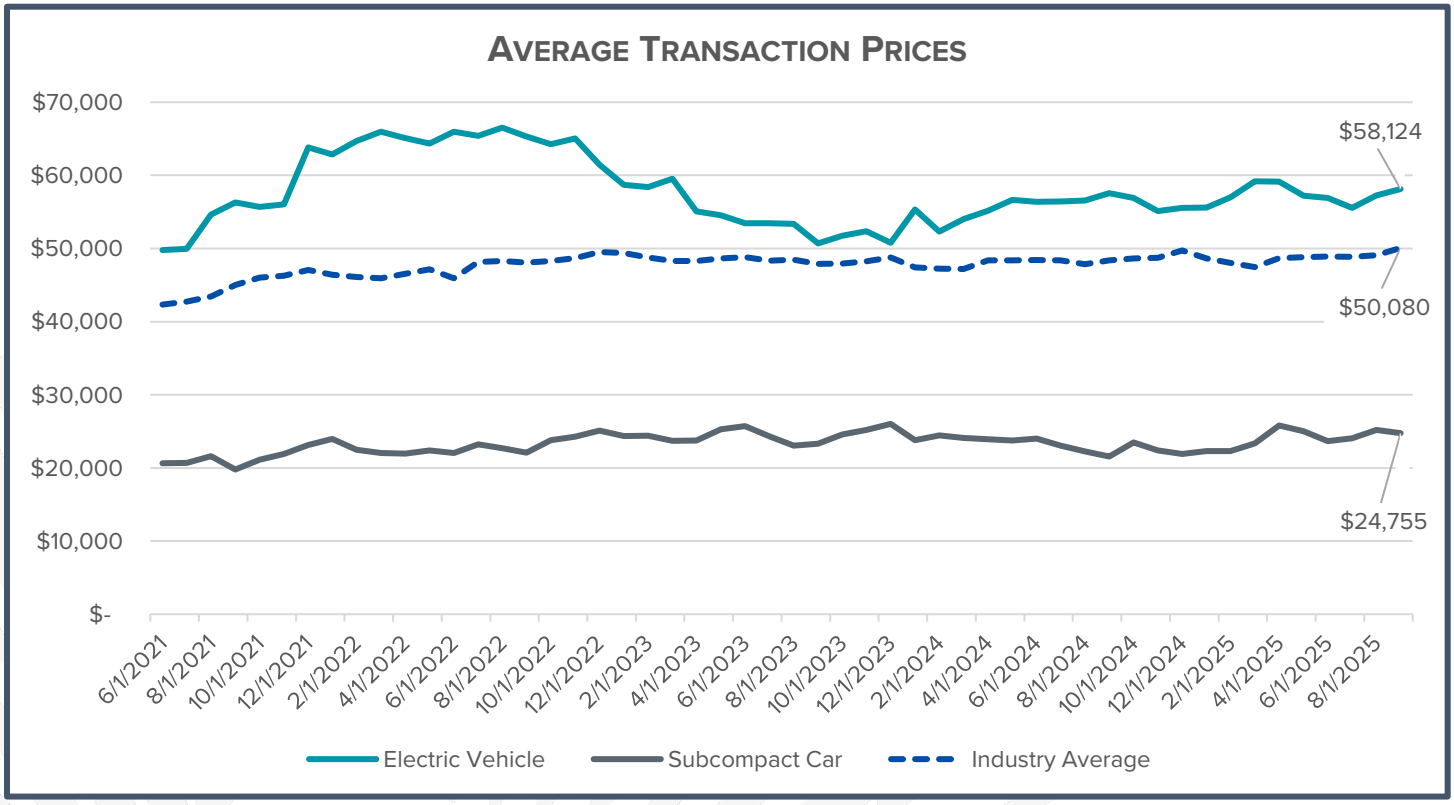




Source: Figures compiled by Alliance for Automotive Innovation with new registrations for retail and fleet data provided by S&P Global Mobility covering January 1, 2020 – September 30, 2025

Electric Vehicle Transaction Prices

"In September, the average transaction price (ATP) for new electric vehicles rose to $58,124, up 1.7% from August and down 0.4% year over year. The price premium over internal combustion engine (ICE+) [ICE+ is comprised of traditional ICE vehicles as well as hybrids and plug-in hybrids] vehicles held steady at $9,070, while incentives eased to 15.3% of ATP, or roughly $8,890."[1]



Compiled from Kelley Blue Book Press Releases, 6/2021 – 9/25

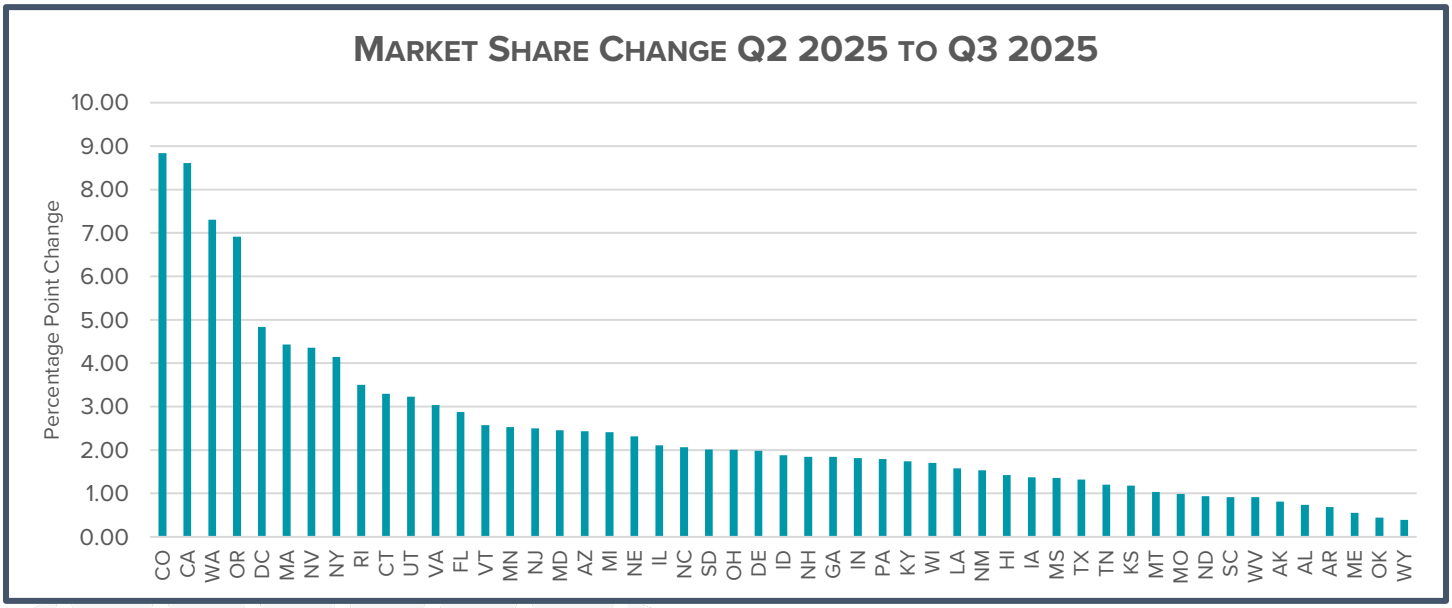
Electric Vehicle Sales by State

For the Third Quarter of 2025

California again leads the nation in EV sales, with BEVs, PHEVs and FCEVs crossing the 30 percent threshold for the first time. Over 31 percent of new light-duty vehicle registrations in California in the third quarter of 2025 were EVs. Colorado was second with 29.4 percent. Washington, the District of Columbia, Oregon, and Nevada were also above 20 percent market share in Q3. Sixteen additional states saw new EV registrations above 10 percent (but below 20 percent).

Every state and DC increased EV market share from the second quarter to the third quarter of 2025. Colorado made the biggest gains in EV market share after increasing nearly 9 pp from the prior quarter. Ten states increased by less than 1 pp.

[1] Cox Automotive, "EV Market Monitor – September 2025," 10/16/2025



Looking at year-over-year, for the third quarter of 2025 vs. 2024, the market share of new EVs registered increased in 39 states (including D.C.). Twelve states witnessed a decreased market share of EVs. Making the largest increase was Nevada (7.4 pp) while Hawaii saw a decrease of 2.5 pp.

For the First Three Quarters of 2025

Through the first three quarters of the year, EV sales represented 10.6 percent of the market – a 0.6 pp increase over the same period of 2024. Over 26 percent of sales in California were EVs. Michigan realized the greatest increase in market share, year-over-year with a 4.8 pp increase. Following Michigan, the states with the largest market share gains were Nevada (2.9 pp), Florida (2.4 pp), Colorado (2 pp), and Louisiana (1.8 pp). In total, 12 states increased their year-over-year EV market share by 1 pp or more. Eleven states decreased. Hawaii saw the largest decline in market share, down 3.8 pp.

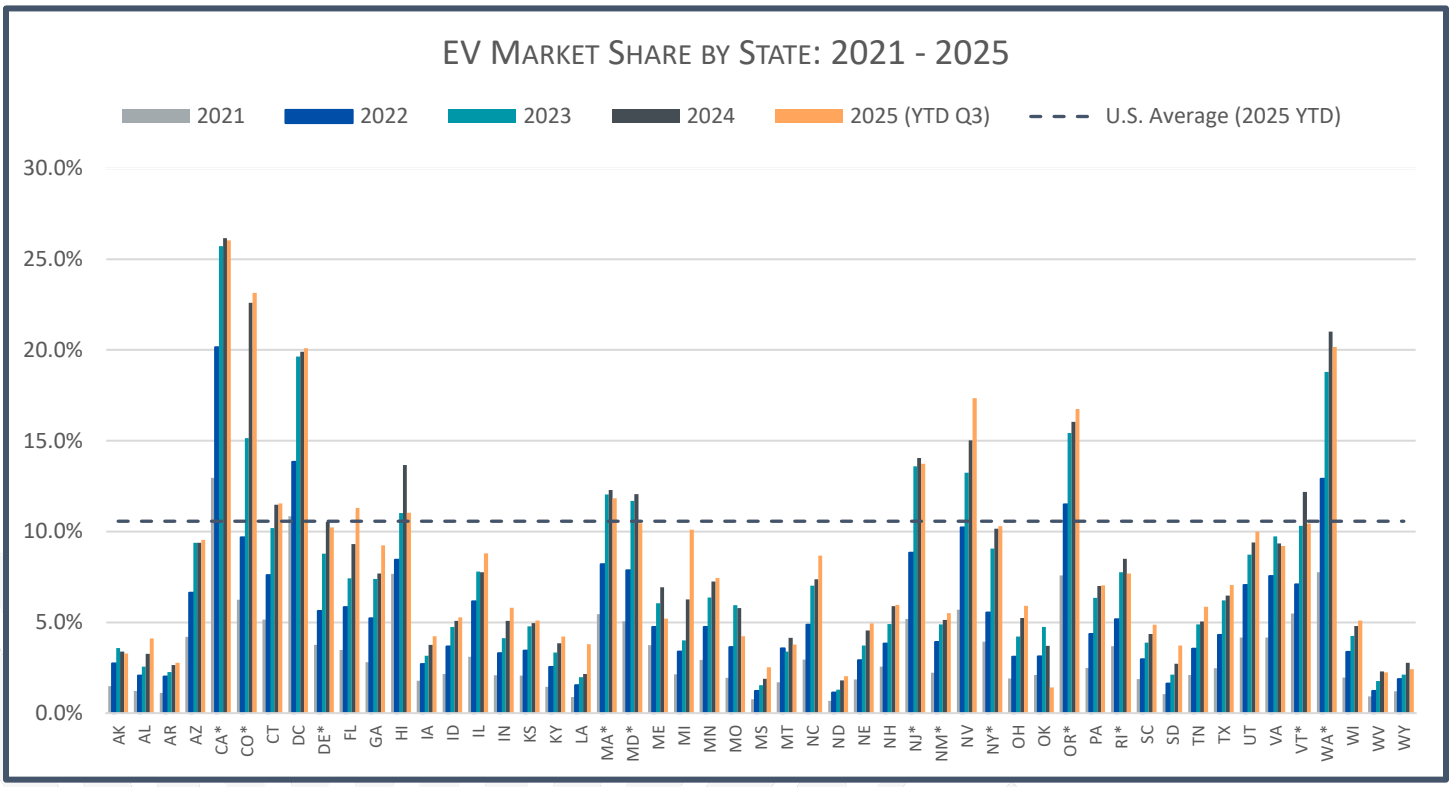
While some states continue to have strong EV sales, six states had new EV registrations of less than 3 percent; Oklahoma was the only state under 2 percent. All states had a market share above 1 percent for new EV sales.

Year to date (through Q3), 16 states and the District of Columbia had an EV market share above 10 percent while 1 state had an EV market share under 2 percent; California was the only state above 25 percent. [2]

2025 EV Market Share by State (YTD Q3)

1	CA	26.03%	**11**	HI	11.04%	**21**	IL	8.80%	**31**	NM	5.50%	**41**	AL	4.11%
2	CO	23.13%	**12**	MD	10.46%	**22**	NC	8.68%	**32**	ID	5.28%	**42**	LA	3.79%
3	WA	20.17%	**13**	VT	10.44%	**23**	RI	7.68%	**33**	ME	5.20%	**43**	MT	3.77%
4	DC	20.09%	**14**	NY	10.30%	**24**	MN	7.45%	**34**	KS	5.11%	**44**	SD	3.73%
5	NV	17.34%	**15**	DE	10.23%	**25**	TX	7.06%	**35**	WI	5.10%	**45**	AK	3.29%
6	OR	16.74%	**16**	MI	10.10%	**26**	PA	7.04%	**36**	NE	4.93%	**46**	AR	2.77%
7	NJ	13.74%	**17**	UT	10.00%	**27**	NH	5.97%	**37**	SC	4.86%	**47**	MS	2.53%
8	MA	11.83%	**18**	AZ	9.54%	**28**	OH	5.91%	**38**	IA	4.24%	**48**	WY	2.43%
9	CT	11.55%	**19**	GA	9.23%	**29**	TN	5.85%	**39**	MO	4.23%	**49**	WV	2.24%
10	FL	11.31%	**20**	VA	9.20%	**30**	IN	5.80%	**40**	KY	4.22%	**50**	ND	2.03%
												51	OK	1.42%

[2] Figures compiled by Alliance for Automotive Innovation with new registrations for retail and fleet data provided by S&P Global Mobility covering January 1, 2021 – September 30, 2025


EV Market Share by State: 2021 - 2025
2021
2022
2023
2024
2025 (YTD Q3)
U.S. Average (2025 YTD)
30.0%
25.0%
20.0%
15.0%
10.0%
5.0%
0.0%
AK AL AR AZ CA* CO* CT DC DE* FL GA HI IA ID IL IN KS KY LA MA* MD* ME MI MN MO MS MT NC ND NE NH NJ* NM* NV NY* OH OK OR* PA RI* SC SD TN TX UT VA VT* WA* WI WV WY

Third Quarter 2025, New Light-Duty Vehicle Registrations By Powertrain					Change In Market Share (2025 Q3 vs 2024 Q3), New Light-Duty Vehicle Registrations Powertrain			
State	Advanced Powertrain Market Share				Advanced Powertrain Market Share (Percentage Point Change)			
	PHEV	BEV	FCEV	EV Total	PHEV	BEV	FCEV	EV Total
AK	0.73%	2.90%	0.00%	**3.64%**	0.0%	-0.4%	0.0%	**-0.37%**
AL	0.59%	4.15%	0.00%	**4.75%**	0.0%	1.3%	0.0%	**1.28%**
AR	0.59%	2.54%	0.00%	**3.13%**	0.0%	0.5%	0.0%	**0.45%**
AZ	1.19%	9.86%	0.00%	**11.05%**	0.1%	1.7%	0.0%	**1.75%**
CA	4.28%	27.16%	0.03%	**31.47%**	0.8%	3.9%	0.0%	**4.64%**
CO	5.09%	24.27%	0.00%	**29.36%**	-0.1%	4.0%	0.0%	**3.87%**
CT	3.46%	9.98%	0.00%	**13.44%**	-0.1%	2.4%	0.0%	**2.29%**
DC	5.19%	17.04%	0.00%	**22.23%**	-0.6%	2.3%	0.0%	**1.79%**
DE	1.86%	9.37%	0.00%	**11.23%**	-0.3%	-0.4%	0.0%	**-0.65%**
FL	1.69%	11.68%	0.00%	**13.37%**	0.4%	3.3%	0.0%	**3.66%**
GA	1.12%	9.30%	0.00%	**10.42%**	0.2%	1.5%	0.0%	**1.69%**
HI	1.66%	9.98%	0.00%	**11.63%**	-1.2%	-1.3%	0.0%	**-2.49%**
IA	1.04%	4.07%	0.00%	**5.12%**	0.0%	1.3%	0.0%	**1.29%**
ID	1.26%	5.23%	0.00%	**6.49%**	-0.1%	1.6%	0.0%	**1.51%**
IL	1.60%	8.51%	0.00%	**10.11%**	0.2%	2.4%	0.0%	**2.57%**
IN	1.19%	5.79%	0.00%	**6.97%**	0.2%	1.4%	0.0%	**1.67%**
KS	0.80%	4.94%	0.00%	**5.74%**	-0.2%	0.6%	0.0%	**0.38%**
KY	1.05%	4.18%	0.00%	**5.24%**	0.2%	0.8%	0.0%	**1.03%**
LA	0.52%	4.51%	0.00%	**5.04%**	0.1%	2.8%	0.0%	**2.89%**
MA	2.61%	11.95%	0.00%	**14.57%**	-1.1%	3.4%	0.0%	**2.31%**
MD	1.95%	10.08%	0.00%	**12.03%**	-0.9%	-0.3%	0.0%	**-1.17%**
ME	1.45%	4.02%	0.00%	**5.47%**	-1.5%	0.2%	0.0%	**-1.29%**
MI	1.77%	10.73%	0.00%	**12.50%**	0.7%	5.3%	0.0%	**6.01%**
MN	1.83%	7.52%	0.00%	**9.35%**	0.1%	2.1%	0.0%	**2.19%**
MO	0.94%	4.05%	0.00%	**4.99%**	-2.0%	-0.3%	0.0%	**-2.30%**
MS	0.44%	2.94%	0.00%	**3.38%**	0.1%	1.8%	0.0%	**1.94%**
MT	1.50%	2.80%	0.00%	**4.30%**	0.0%	-0.2%	0.0%	**-0.22%**
NC	1.40%	8.89%	0.00%	**10.29%**	0.2%	2.6%	0.0%	**2.77%**
ND	0.63%	1.93%	0.00%	**2.56%**	0.2%	0.6%	0.0%	**0.75%**
NE	1.22%	5.28%	0.00%	**6.50%**	0.0%	1.9%	0.0%	**1.80%**
NH	1.73%	5.25%	0.00%	**6.98%**	-0.2%	1.4%	0.0%	**1.15%**
NJ	2.96%	12.35%	0.00%	**15.31%**	0.4%	-0.7%	0.0%	**-0.28%**
NM	1.05%	5.48%	0.00%	**6.54%**	-0.1%	1.0%	0.0%	**0.95%**
NV	2.17%	18.36%	0.00%	**20.53%**	0.2%	7.2%	0.0%	**7.39%**
NY	3.58%	9.32%	0.00%	**12.90%**	0.5%	2.5%	0.0%	**3.06%**
OH	1.31%	5.97%	0.00%	**7.28%**	0.3%	1.6%	0.0%	**1.87%**
OK	0.27%	1.59%	0.00%	**1.86%**	-1.0%	0.2%	0.0%	**-0.71%**
OR	3.85%	16.81%	0.00%	**20.67%**	0.0%	3.7%	0.0%	**3.68%**
PA	2.00%	6.06%	0.00%	**8.07%**	0.0%	1.3%	0.0%	**1.23%**
RI	2.69%	7.14%	0.00%	**9.83%**	-0.2%	1.7%	0.0%	**1.47%**
SC	0.96%	4.42%	0.00%	**5.39%**	0.0%	0.9%	0.0%	**0.85%**
SD	2.23%	2.64%	0.00%	**4.87%**	1.2%	1.0%	0.0%	**2.25%**
TN	0.97%	5.96%	0.00%	**6.94%**	0.3%	1.5%	0.0%	**1.79%**
TX	0.94%	6.83%	0.00%	**7.77%**	0.2%	0.8%	0.0%	**1.00%**
UT	1.82%	10.29%	0.00%	**12.11%**	0.2%	2.4%	0.0%	**2.60%**
VA	1.89%	9.51%	0.00%	**11.41%**	0.1%	1.2%	0.0%	**1.32%**
VT	3.20%	8.22%	0.00%	**11.42%**	-0.7%	-1.6%	0.0%	**-2.24%**
WA	3.00%	21.19%	0.00%	**24.18%**	-0.1%	-0.3%	0.0%	**-0.41%**
WI	1.12%	5.14%	0.00%	**6.26%**	0.1%	1.4%	0.0%	**1.53%**
WV	0.61%	1.90%	0.00%	**2.51%**	-0.1%	0.3%	0.0%	**0.21%**
WY	0.68%	1.97%	0.00%	**2.65%**	-0.4%	-0.1%	0.0%	**-0.53%**
U.S.	**1.98%**	**10.62%**	**0.00%**	**12.60%**	**0.1%**	**1.9%**	**0.0%**	**2.00%**

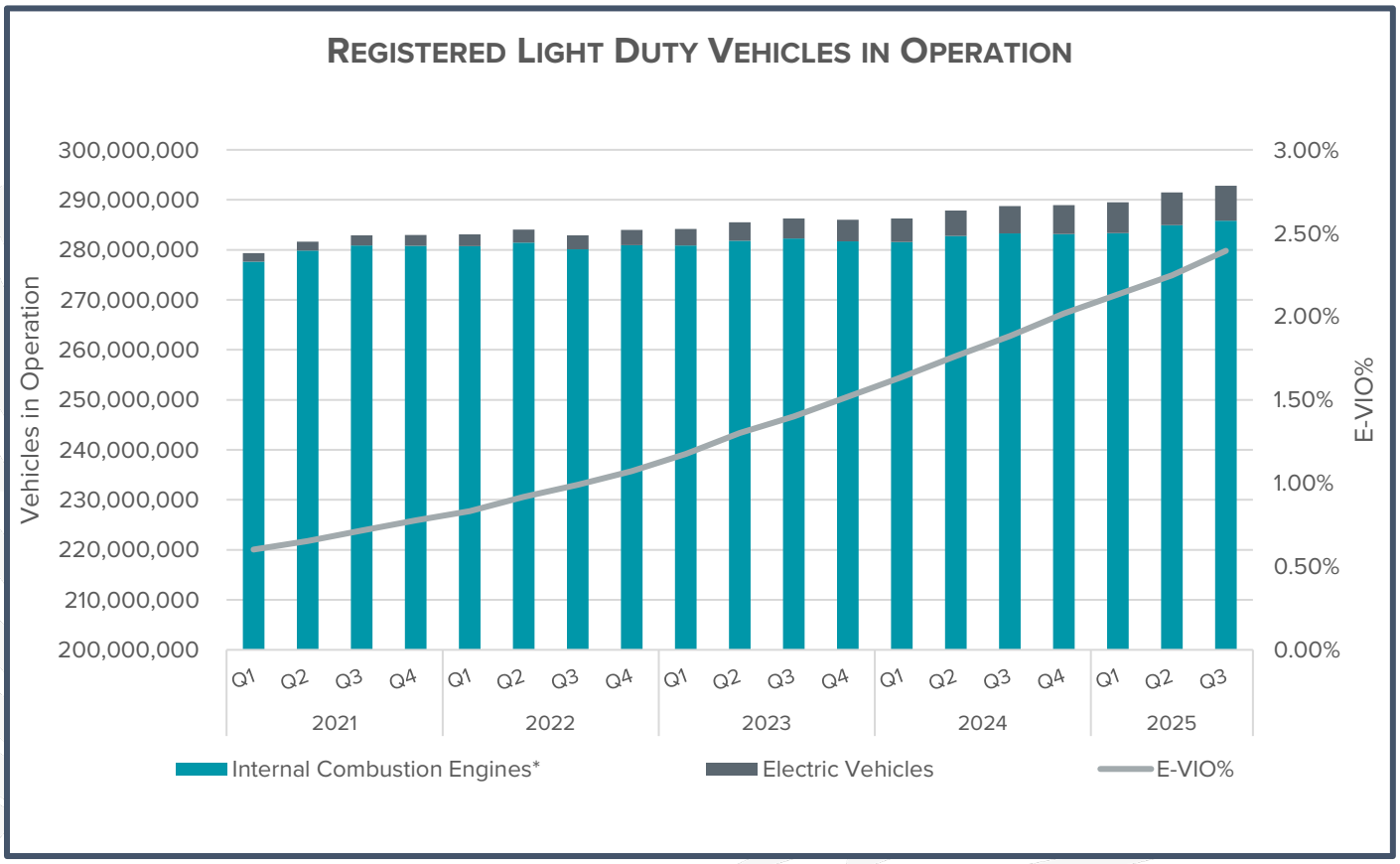
Source: Figures compiled by Alliance for Automotive Innovation with new registrations for retail and fleet data provided by S&P Global Mobility covering June 1 – September 30, 2024, and June 1 – September 30, 2025

2025 YTD (Q3) New Light-Duty Vehicle Registrations By Powertrain					Change In Market Share YTD (2025 Q3 vs 2024 Q3), New Light-Duty Vehicle Registrations Powertrain			
State	Advanced Powertrain Market Share				Advanced Powertrain Market Share (Percentage Point Change)			
	PHEV	BEV	FCEV	EV Total	PHEV	BEV	FCEV	EV Total
AK	0.70%	2.59%	0.00%	**3.29%**	0.05	-0.03	0.00	**0.02**
AL	0.67%	3.45%	0.00%	**4.11%**	-0.07	-0.97	0.00	**1.04**
AR	0.60%	2.18%	0.00%	**2.77%**	-0.08	-0.19	0.00	**0.27**
AZ	1.22%	8.32%	0.00%	**9.54%**	0.11	-0.34	0.00	**0.23**
CA	3.90%	22.10%	0.02%	**26.03%**	-0.40	0.50	0.01	**-0.11**
CO	5.00%	18.13%	0.00%	**23.13%**	0.85	-2.87	0.00	**2.01**
CT	3.34%	8.21%	0.00%	**11.55%**	0.49	-0.90	0.00	**0.40**
DC	4.80%	15.29%	0.00%	**20.09%**	0.58	-0.91	0.00	**0.33**
DE	2.22%	8.01%	0.00%	**10.23%**	0.07	-0.13	0.00	**0.06**
FL	1.58%	9.73%	0.00%	**11.31%**	-0.37	-2.02	0.00	**2.39**
GA	1.19%	8.04%	0.00%	**9.23%**	-0.29	-1.37	0.00	**1.66**
HI	1.64%	9.39%	0.00%	**11.04%**	3.03	0.77	0.00	**-3.80**
IA	1.08%	3.16%	0.00%	**4.24%**	-0.07	-0.58	0.00	**0.65**
ID	1.34%	3.94%	0.00%	**5.28%**	0.01	-0.64	0.00	**0.63**
IL	1.75%	7.04%	0.00%	**8.80%**	-0.35	-1.03	0.00	**1.38**
IN	1.17%	4.63%	0.00%	**5.80%**	-0.18	-0.89	0.00	**1.07**
KS	0.98%	4.12%	0.00%	**5.11%**	0.11	-0.41	0.00	**0.30**
KY	1.04%	3.18%	0.00%	**4.22%**	-0.32	-0.25	0.00	**0.57**
LA	0.52%	3.27%	0.00%	**3.79%**	-0.02	-1.83	0.00	**1.85**
MA	3.01%	8.82%	0.00%	**11.83%**	0.81	-0.98	0.00	**0.17**
MD	2.24%	8.22%	0.00%	**10.46%**	0.52	1.01	0.00	**-1.53**
ME	1.84%	3.35%	0.00%	**5.20%**	1.30	0.25	0.00	**-1.55**
MI	2.55%	7.55%	0.00%	**10.10%**	-1.50	-3.25	0.00	**4.75**
MN	1.90%	5.55%	0.00%	**7.45%**	-0.13	-0.43	0.00	**0.57**
MO	0.89%	3.34%	0.00%	**4.23%**	1.31	0.35	0.00	**-1.66**
MS	0.41%	2.12%	0.00%	**2.53%**	-0.02	-0.72	0.00	**0.73**
MT	1.43%	2.34%	0.00%	**3.77%**	-0.12	0.41	0.00	**-0.29**
NC	1.59%	7.09%	0.00%	**8.68%**	-0.46	-1.28	0.00	**1.74**
ND	0.51%	1.52%	0.00%	**2.03%**	0.03	-0.37	0.00	**0.34**
NE	1.14%	3.80%	0.00%	**4.93%**	0.13	-0.83	0.00	**0.70**
NH	1.86%	4.10%	0.00%	**5.97%**	0.40	-0.78	0.00	**0.38**
NJ	2.89%	10.85%	0.00%	**13.74%**	-0.11	0.01	0.00	**0.10**
NM	1.11%	4.38%	0.00%	**5.50%**	-0.04	-0.45	0.00	**0.49**
NV	2.03%	15.30%	0.00%	**17.34%**	-0.28	-2.60	0.00	**2.88**
NY	3.19%	7.10%	0.00%	**10.30%**	0.77	-1.34	0.00	**0.57**
OH	1.37%	4.54%	0.00%	**5.91%**	-0.24	-0.71	0.00	**0.95**
OK	0.38%	1.04%	0.00%	**1.42%**	3.17	-0.01	0.00	**-3.16**
OR	3.85%	12.89%	0.00%	**16.74%**	0.42	-0.91	0.00	**0.49**
PA	2.04%	5.00%	0.00%	**7.04%**	0.30	-0.67	0.00	**0.37**
RI	2.25%	5.43%	0.00%	**7.68%**	1.12	-0.67	0.00	**-0.45**
SC	1.06%	3.81%	0.00%	**4.86%**	-0.04	-0.61	0.00	**0.65**
SD	1.72%	2.01%	0.00%	**3.73%**	-0.86	-0.49	0.00	**1.35**
TN	1.08%	4.77%	0.00%	**5.85%**	-0.47	-0.57	0.00	**1.04**
TX	0.97%	6.08%	0.00%	**7.06%**	-0.15	-0.54	0.00	**0.68**
UT	2.04%	7.96%	0.00%	**10.00%**	-0.44	-0.44	0.00	**0.88**
VA	2.05%	7.15%	0.00%	**9.20%**	-0.46	0.11	0.00	**0.36**
VT	3.25%	7.19%	0.00%	**10.44%**	0.88	0.88	0.00	**-1.76**
WA	3.23%	16.94%	0.00%	**20.17%**	-0.06	0.78	0.00	**-0.72**
WI	1.18%	3.92%	0.00%	**5.10%**	-0.23	-0.40	0.00	**0.63**
WV	0.63%	1.61%	0.00%	**2.24%**	0.07	-0.18	0.00	**0.11**
WY	0.73%	1.69%	0.00%	**2.43%**	0.21	0.16	0.00	**-0.37**
U.S.	**1.98%**	**8.59%**	**0.00%**	**10.57%**	**0.07**	**-0.66**	**0.00**	**0.59**

Source: Figures compiled by Alliance for Automotive Innovation with new registrations for retail and fleet data provided by S&P Global Mobility covering January 1 – September 30, 2024, and January 1 – September 30, 2025

REGISTRATIONS AND CHARGING/REFUELING

Share of Registered EVs In U.S. Light-Duty Fleet Continues to Increase Incrementally. As sales of EVs increase, so does the total number of EVs operating on U.S. roads. There are now more than 7 million EVs in operation in the United States, representing 2.4 percent of all light vehicles in operation (an increase of 0.15 pp from Q2 2025). EVs represented more than 1 percent of total vehicles in operation (VIO) for the first time at the end of 2022 and topped 2 percent for the first time at the end of 2024. The electric vehicles in operation (E-VIO) of 2.4 percent is an increase of 0.5 pp since the third quarter of 2024 and four times the E-VIO from the first quarter in 2021 (0.60 percent).[3] Since the beginning of 2023, the average increase quarter-over-quarter is 0.12 pp. The continued growth in E-VIO has implications for the number of chargers needed to support their operation.



U.S. Public Charging Infrastructure: Overview

Here is a snapshot of publicly available EV charging and refueling infrastructure[4] available across the United States at the end of the third quarter of 2025[5]:

Station and Charging Ports Through Q3 2025

Level 2: 65,352 Stations, 169,286 EVSE Ports
DC Fast: 14,203 Stations, 65,663 EVSE Ports

[3] Registered vehicles in operation compiled by Alliance for Automotive Innovation with data provided by S&P Global Mobility as September 30, 2025
[4] "Stations" denotes stations as counted and identified by U.S. Department of Energy Alternative Fuels Data Center. Stations differs from number of locations as many stations can be at a singular location. Locations denote unique addresses.
[5] Charging information from U.S. Department of Energy Alternative Fuels Data Center, stations in operation as of September 30, 2025
Note: prior editions of this report excluded proprietary chargers, however Tesla opened their previously proprietary chargers in November 2022 and their "North American Charging Standard" will be widely adopted by automakers.

Hydrogen Refueling: 53 Stations (51 are in California)
U.S. Total: *78,038[6] EVSE Stations, 235,042 EVSE Ports*

See Recommended Attributes for EV Charging Stations

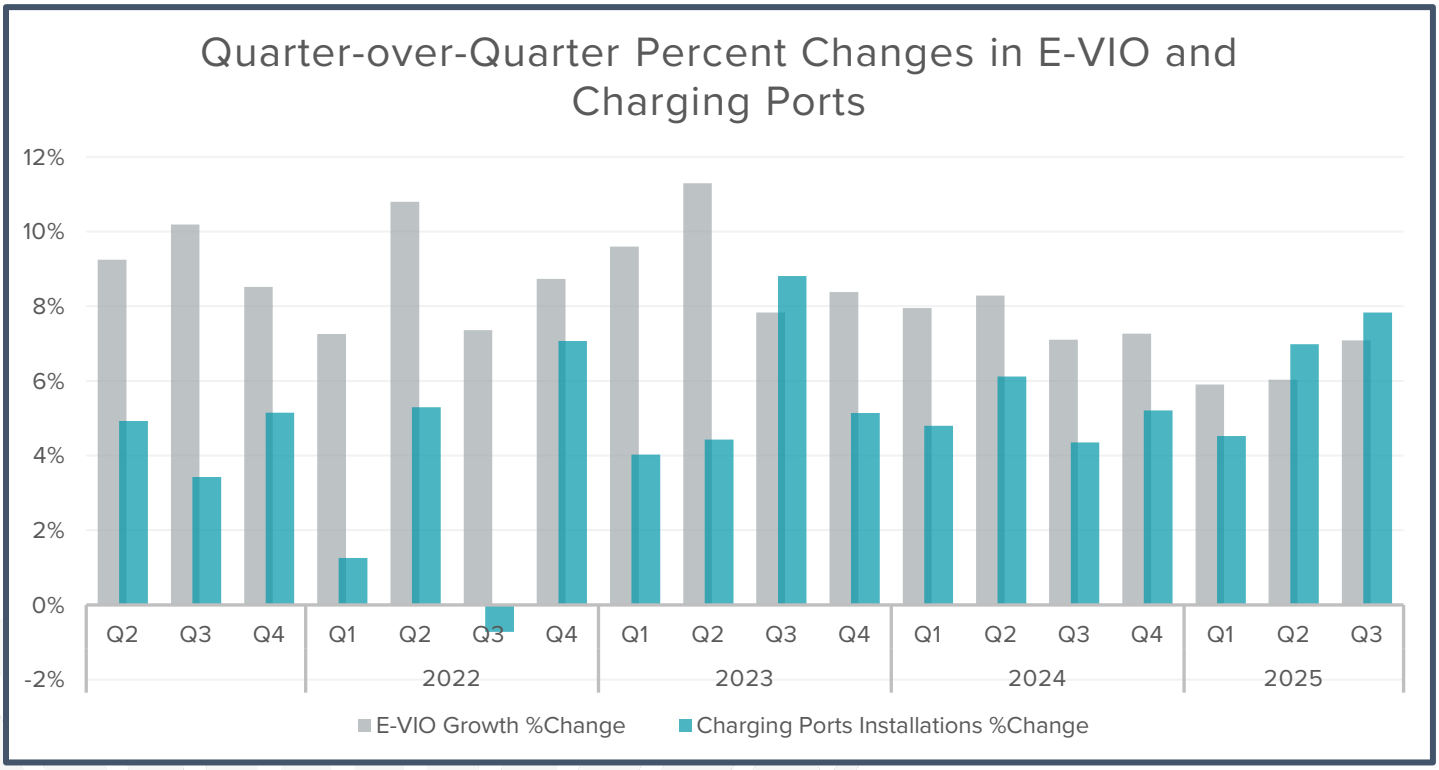
Charging Infrastructure by Unique[7] Location

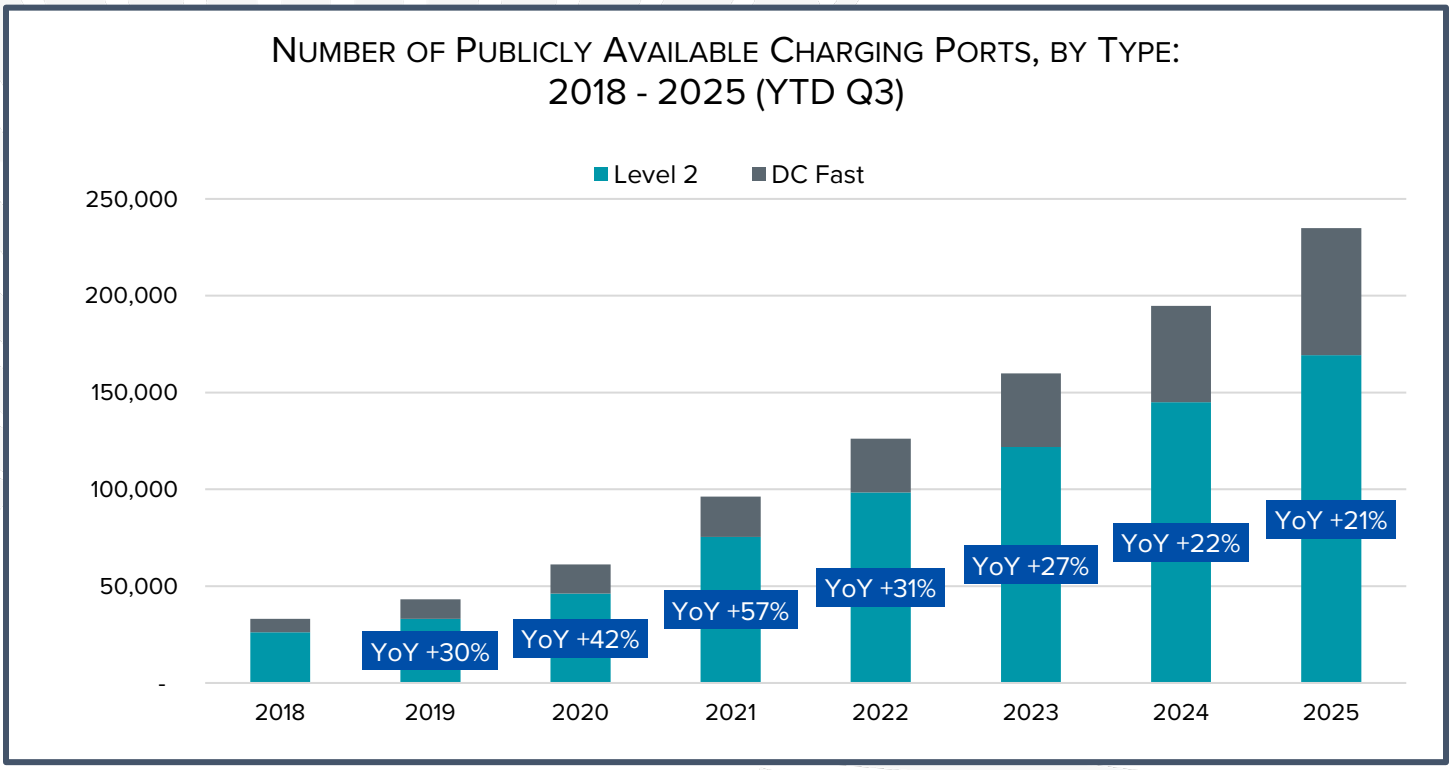
State	Locations	L2 Ports	DC Fast Ports	State	Locations	L2 Ports	DC Fast Ports
AK	64	107	64	MT	132	217	249
AL	400	793	850	NC	1494	3963	1744
AR	315	840	243	ND	89	131	145
AZ	1018	3206	1336	NE	260	475	226
CA	10039	45020	16562	NH	224	466	314
CO	1784	5136	1491	NJ	1271	3589	1915
CT	1160	3726	749	NM	315	566	511
DC	251	1015	55	NV	440	1518	1081
DE	180	477	293	NY	3771	15589	2818
FL	3138	9235	4115	OH	1456	3701	1356
GA	1604	5208	1897	OK	357	641	1060
HI	291	794	172	OR	1194	2842	1175
IA	392	694	529	PA	1489	3862	1727
ID	198	386	251	RI	218	717	127
IL	1332	3109	2028	SC	559	1211	774
IN	563	1151	874	SD	107	165	150
KS	348	961	344	TN	773	2078	961
KY	322	677	404	TX	2923	7588	4443
LA	248	472	366	UT	632	2112	688
MA	2215	8521	1658	VA	1244	3810	1592
MD	1405	4107	1311	VT	398	1045	256
ME	464	1161	362	WA	1759	5807	1912
MI	1458	3711	1460	WI	671	1349	784
MN	850	2041	816	WV	162	328	216
MO	773	2458	738	WY	109	161	167
MS	189	349	304	**US. Total**	**53,048**	**169,286**	**65,663**

U.S. Public Charging: Recent Progress

So far in 2025, the number of public Level 2 chargers increased by 17 percent over 2024. DC Fast chargers increased 32 percent. Total charging ports increased 21 percent from the end of 2024. [8] (For context, E-VIO increased 20 percent from the end of 2024 to the end of Q3 2025.) For the second quarter in a row, EV charging port growth has outpaced increases in E-VIO. This is only the third time charging installations outpaced increases in E-VIO and the first time for back-to-back quarters.

[6] Some station locations have both Level 2 and DC Fast installed.
[7] Locations denote unique addresses.
[8] Charging information from U.S. Department of Energy Alternative Fuels Data Center, stations in operation as of September 30, 2025

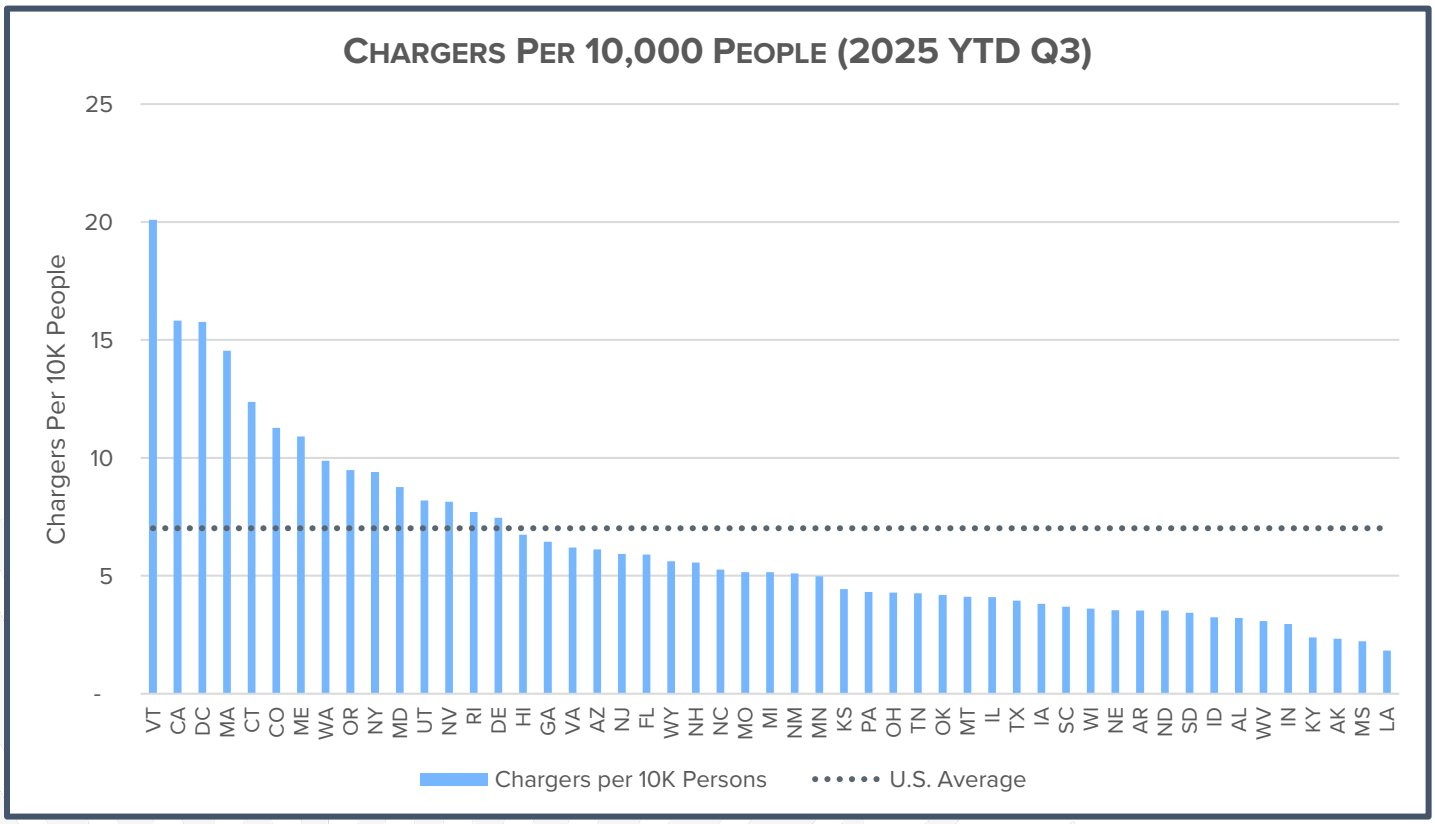


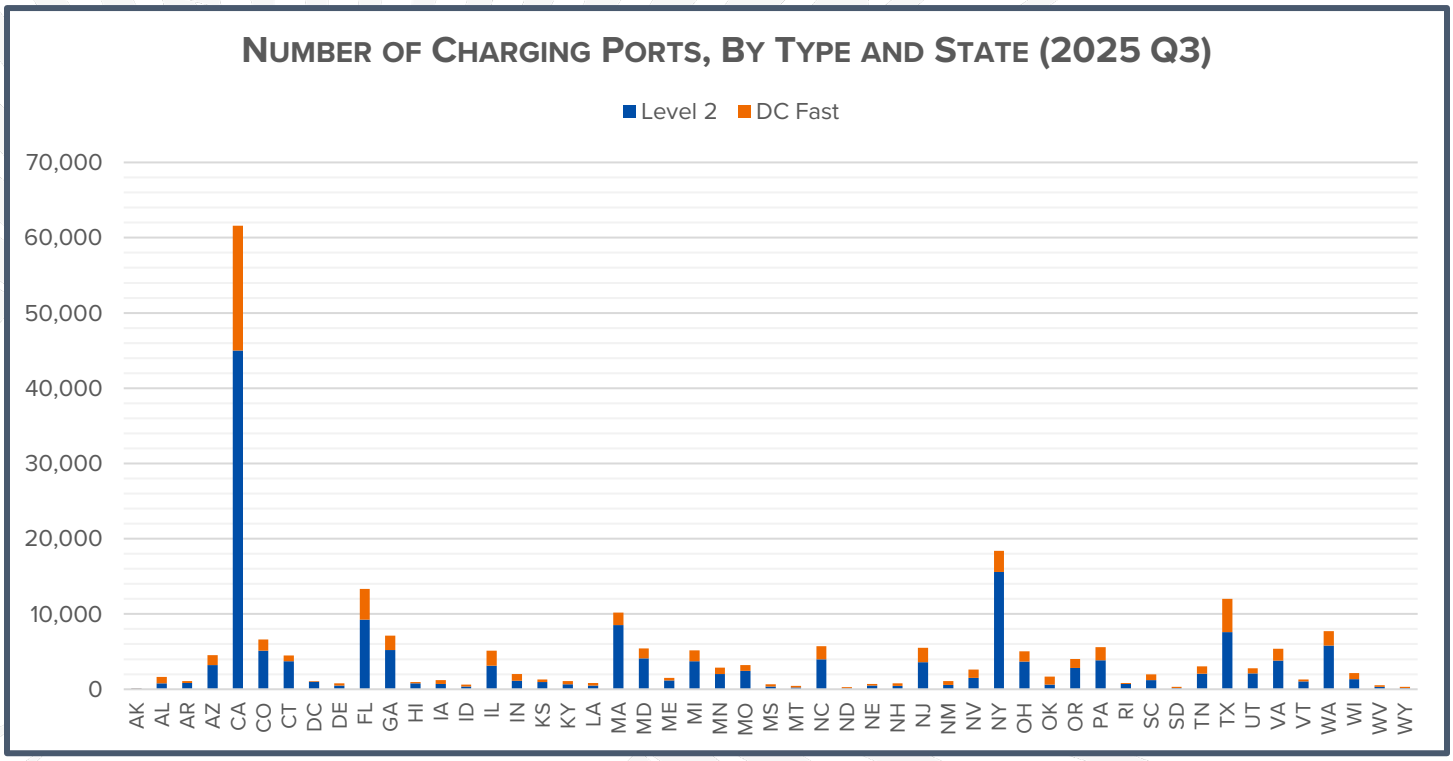


U.S. Public Charging: Chargers Per Capita

While it's useful to understand how many charging ports are installed, it's also important to understand the number of chargers in comparison to each state's population. While some states may seem better positioned due to a higher number of chargers, those states shift when compared at a per capita basis. California has by far the most installed

public charging equipment, but due to the state's size, their per capita rate is 16 chargers per 10,000 people. The national average is 7 chargers per 10,000 people.

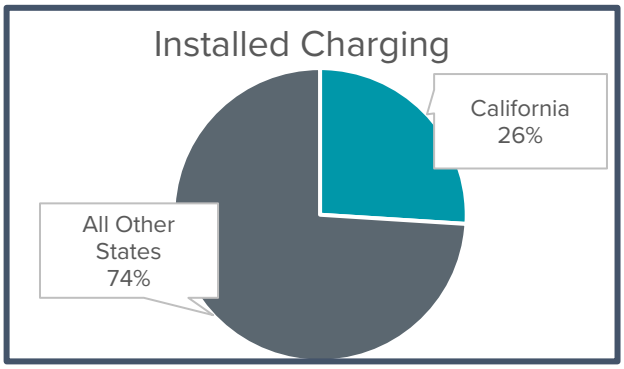




[9] Charging information from U.S. Department of Energy Alternative Fuels Data Center, stations in operation as of September 30, 2025

Infrastructure Distribution and Disparities by Geography

Geographic disparities in charging infrastructure are pervasive. At the end of Q3 2025, just over a quarter of all public charging infrastructure was in California, which had 31 percent of all registered EVs.



U.S. Public Charging Outlook: Scale, Reliability, Cost, and Adoption Implications

As noted above, the U.S. fast-charging network is expanding, but growth remains uneven relative to electric vehicle adoption and access to public charging remains a key barrier to EV adoption. A J.D. Power study found 41 percent of shoppers who are unlikely to consider an EV were concerned about access to public charging.[10]

Paren's U.S. EV Fast Charging report forecasts that 2025 will see approximately 16,700 new DC fast-charging points installed nationwide, a 19 percent year-over-year increase and three times the number added in 2021. At this pace, Paren projects that the total number of U.S. fast-charging ports will surpass 100,000 by 2027, nearly double the size of the network in 2024 and approximately four times the number installed in 2022.[11]

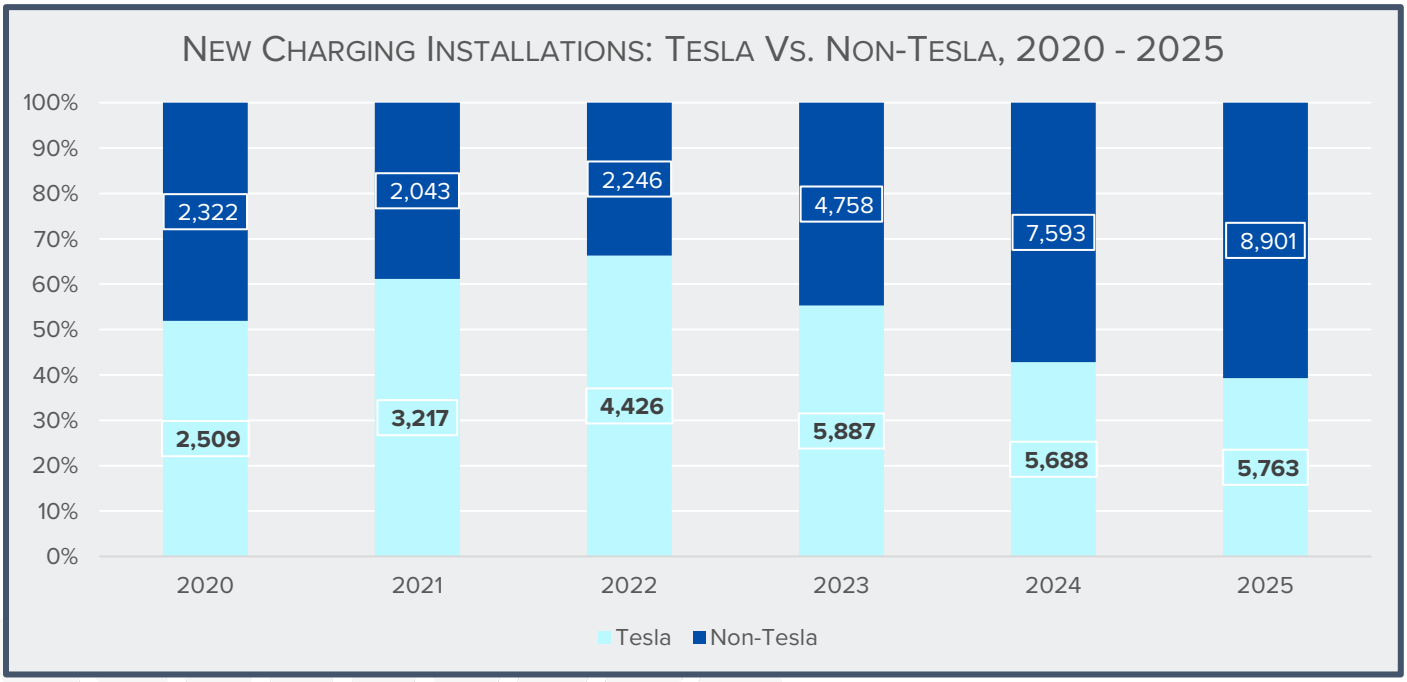
Despite this growth, multiple studies suggest that current and planned infrastructure still lags recommended public charger-to-EV ratios. Industry and research benchmarks frequently cite an optimal ratio of roughly 8 to 12 EVs per public charger to ensure reasonable access and minimize wait times[12]. By contrast, our analysis shows the U.S. average is 30, with states varying from 9 EVs per charger (Wyoming) up to 46 EVs per charger (New Jersey). Nearly half of the states are between 20 to 30 EVs per charger (see full chart in next section). This gap indicates that continued investment and accelerated build-out remain critical to supporting mainstream EV adoption, even as installation rates increase.

The composition of new infrastructure is also shifting in ways that may improve network performance. Non-Tesla charging networks are now leading new deployment, with 2024 marking the first year in which new non-Tesla fast chargers outnumbered new Tesla installations, a trend expected to continue through 2025.[13] A more diversified charging ecosystem reduces reliance on a single provider and increases redundancy, which is particularly important in regions where charger scarcity amplifies the consequences of equipment failure.

Level 2 Chargers and DC Fast Chargers

Both Level 2 and DC Fast charging play important roles in electrifying the light-duty vehicle fleet. However, the key difference between Level 2 and DC Fast chargers is how quickly each will charge an EV's battery. Level 2 equipment is common for home, workplace, and public charging with longer dwell times. Level 2 chargers can fully charge a BEV from empty in 4-10 hours and a PHEV from empty in 1-2 hours. DC Fast charging equipment enables rapid charging of BEVs in 20 minutes to 1 hour along heavy-traffic corridors, in city centers, at transportation hubs, and fleet depots. Wider installation of Level 2 chargers, DC Fast chargers, and hydrogen fueling will be necessary to support current and future EV sales.

[10] E-Vision Intelligence Report, "Despite Improvements in Reliability and Availability, Public Charging Remains Top Stumbling Block to EV Adoption," J.D. Power, 6/2025
[11] Kit Million Ross, "US fast EV charging deploying at 'record pace'," EV Infrastructure News, 7/29/2025
[12] Susan Carpenter, "Study: Most States Lag In EV Charger Infrastructure," *Spectrum New*, 9/9/2024
[13] Kit Million Ross, "US fast EV charging deploying at 'record pace'," EV Infrastructure News, 7/29/2025



Charging information from U.S. Department of Energy Alternative Fuels Data Center, as of September 30, 2025

Recent reliability research underscores the importance of this new build-out. Studies measuring first-time charge success rates, rather than self-reported "uptime," consistently find that newer charging stations perform significantly better than older installations. Real-world data show first-attempt success rates in the mid-80 percent range for newer chargers, compared with low-70 percent or worse for stations older than three years, as hardware degradation, software compatibility issues, and deferred maintenance accumulate.[14] As a result, the current wave of investment is likely to raise average network reliability.

Cost remains a parallel concern. Multiple analyses find that charging away from home – particularly via DC fast chargers – costs two to three times more per kilowatt-hour than residential charging, with average home rates around $0.17–$0.18/kWh[15] compared with $0.40–$0.50/kWh[16] or higher for public fast charging in many regions. These higher costs are driven by capital expenses, utility demand charges, and limited competition at many charging sites.

However, greater charger density and increased competition among networks may help moderate public charging prices over time. As more fast chargers are deployed (especially in high-traffic corridors and urban areas where multiple providers co-locate) drivers gain alternatives, and networks face stronger pressure to compete on price, reliability, and user experience. While public charging is likely to remain more expensive than home charging, expanded access and competition could slow price escalation and reduce extreme regional price disparities, improving the overall economics of EV ownership for drivers without reliable home charging access.

Taken together, the data suggest that charging infrastructure investment remains a central lever for EV adoption. While rapid growth in fast-charging deployment is improving reliability and expanding consumer choice, the gap between recommended charger-to-EV ratios and current infrastructure levels persists. Closing that gap by accelerating deployment of newer, more reliable chargers and fostering competition across networks will be essential to reducing cost barriers, improving user confidence, and enabling the next phase of EV adoption in the United States.

Alliance for Automotive Innovation is proactively engaging to address EV policy needs through development of a lithium-ion battery recycling policy framework, recommendations for attributes of EV charging stations.

[14] Charger Help, "ChargerHelp Report Reveals Charge Success Rate and not Uptime More Accurate Metric for EV Driver Experience," 9/24/2025
[15] Casey McDevitt, "How EV home charging vs. public charging affects your wallet," EnergySage, 10/20/2025
[16] Jonathan Touriño Jacobo, "US Fast-Charging EV Charging Price Increases To US$0.49/Kwh In Q3 2025," EV Infrastructure News,

Vehicles in Operation and Charging Infrastructure by State

Public Charging Outlets And Registerd EVs (as of 9/30/2025)								
	EV Level 2	EV DC Fast	H2* Fueling	Total	Percent EVs of Total VIO**	Share of Registered EVs***	EVs Per Charger	EVs Per 10K Residents
AK	107	64		171	0.84%	0.07%	30	70
AL	793	850		1,643	0.57%	0.42%	18	58
AR	840	243		1,083	0.54%	0.22%	14	51
AZ	3,206	1,336		4,542	2.44%	2.47%	38	233
CA	45,020	16,562	51	61,633	7.01%	31.47%	36	566
CO	5,136	1,491		6,627	3.80%	3.03%	32	361
CT	3,726	749		4,475	2.34%	1.04%	16	201
DC	1,015	55		1,070	4.85%	0.23%	15	239
DE	477	293		770	2.16%	0.28%	26	193
FL	9,235	4,115		13,350	2.56%	7.26%	38	225
GA	5,208	1,897		7,105	1.78%	2.47%	24	157
HI	794	172	1	967	3.72%	0.60%	44	295
IA	694	529		1,223	0.68%	0.32%	18	70
ID	386	251		637	1.02%	0.30%	33	108
IL	3,109	2,028		5,137	1.94%	2.86%	39	160
IN	1,151	874		2,025	0.96%	0.87%	30	89
KS	961	344		1,305	0.86%	0.36%	20	87
KY	677	404		1,081	0.65%	0.39%	25	60
LA	472	366		838	0.57%	0.31%	26	47
MA	8,521	1,658		10,179	2.99%	2.41%	17	241
MD	4,107	1,311		5,418	2.88%	2.12%	27	240
ME	1,161	362		1,523	1.60%	0.31%	14	156
MI	3,711	1,460		5,171	1.54%	1.90%	26	133
MN	2,041	816		2,857	1.51%	1.15%	28	140
MO	2,458	738		3,196	0.96%	0.80%	18	91
MS	349	304		653	0.30%	0.14%	15	32
MT	217	249		466	0.57%	0.15%	23	96
NC	3,963	1,744		5,707	1.51%	2.13%	26	138
ND	131	145		276	0.32%	0.04%	10	34
NE	475	226		701	0.77%	0.24%	24	84
NH	466	314		780	1.66%	0.32%	29	161
NJ	3,589	1,915		5,504	3.32%	3.62%	46	273
NM	566	511		1,077	1.10%	0.32%	21	108
NV	1,518	1,081		2,599	3.70%	1.36%	37	298
NY	15,589	2,818		18,407	2.76%	4.48%	17	160
OH	3,701	1,356		5,057	1.12%	1.75%	24	104
OK	641	1,060		1,701	1.36%	0.90%	37	156
OR	2,842	1,175		4,017	3.30%	1.84%	32	305
PA	3,862	1,727		5,589	1.51%	2.39%	30	129
RI	717	127		844	1.92%	0.19%	16	122
SC	1,211	774		1,985	0.82%	0.64%	23	84
SD	165	150		315	0.49%	0.07%	16	54
TN	2,078	961		3,039	0.99%	1.00%	23	99
TX	7,588	4,443	1	12,032	1.69%	6.16%	36	142
UT	2,112	688		2,800	2.57%	1.16%	29	238
VA	3,810	1,592		5,402	1.98%	2.22%	29	179
VT	1,045	256		1,301	3.39%	0.27%	15	291
WA	5,807	1,912		7,719	3.95%	3.98%	36	357
WI	1,349	784		2,133	1.02%	0.80%	26	95
WV	328	216		544	0.44%	0.10%	13	40
WY	161	167		328	0.44%	0.04%	9	51
U.S.	**169,286**	**65,663**	**53**	**235,002**	**2.39%**	**100.00%**	**30**	**209**

*Hydrogen count denotes stations
** VIO is vehicles in operation;
*** State share of U.S. Total
Source: Figures compiled by Alliance for Automotive Innovation with registered vehicle data provided by S&P Global Mobility as of September 30, 2025; Charging information from U.S. Department of Energy Alternative Fuels Data Center, as of September 30, 2025

REGISTRATIONS

EV registrations as a share of all registered light-duty vehicles are 2.4 percent (as of June 30, 2025). There are nearly 293 million registered light-duty vehicles in the U.S.

At the end of Q3 2025, California accounted for 31.5 percent of all registered light-duty EVs in the U.S.

States with highest portion of total EVs registered:

1. CA (2,206,446, 7.01%)
2. DC (16,261, 4.85%)
3. WA (278,940, 3.95%)
4. CO (212,329, 3.8%)
5. HI (42,290, 3.72%)
6. NV (95,067, 3.7%)
7. VT (18,865, 3.39%)
8. NJ (253,862, 3.32%)
9. OR (129,246, 3.3%)
10. MA (168,731, 2.99%)

States with highest ratio of registered EVs per public charger:

1. NJ
2. HI
3. IL
4. FL
5. AZ
6. OK
7. NV
8. WA
9. TX
10. CA

Read more about automakers plans for ***ELECTRIC VEHICLES HERE***

SPOTLIGHT: CONSUMER ACCEPTANCE OF ELECTRIC VEHICLES

Now That the EV Incentives Are Gone, Where Do We Go from Here? Advancing EV Adoption Through the Dealership Network in a Post-Incentive Market

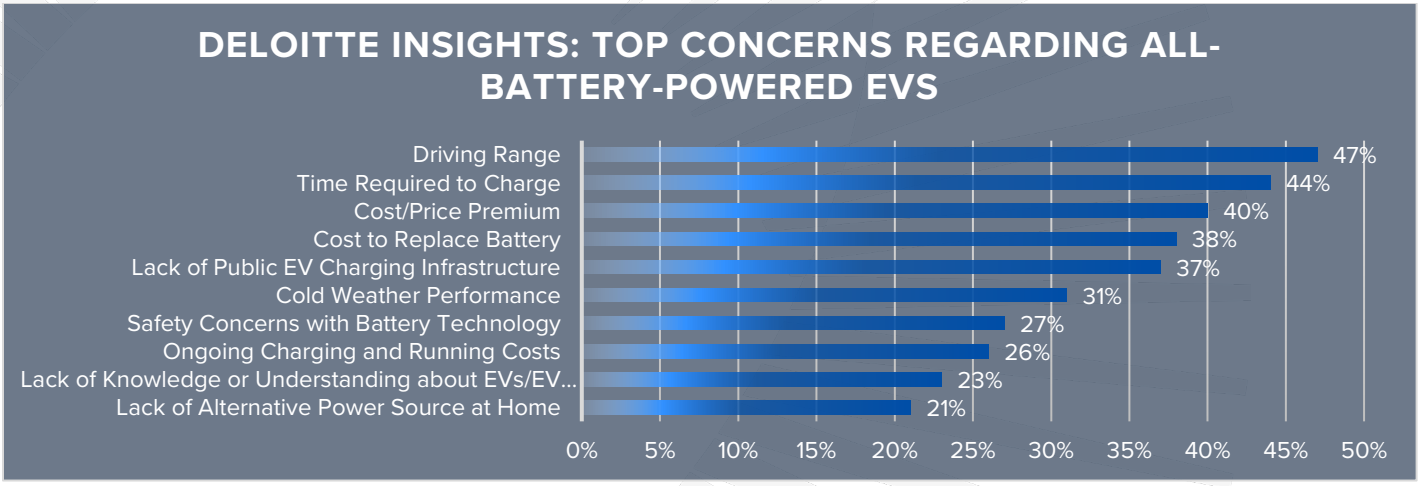
As federal EV purchase incentives have ended, the U.S. EV market is entering a new stage, one in which consumer acceptance, confidence, and perceived value will play a larger role in adoption than policy support alone. While awareness of EVs is high, surveys consistently show that many consumers remain uncertain about ownership, cost, and charging. In this environment, auto dealers are uniquely positioned to shape outcomes, serving as the primary interface between consumers and EV technology and indeed see themselves as "essential to mass market adoption of alternative-powered vehicles."[17]

Consumer Acceptance as a Driver of Adoption

Studies indicate that consumer acceptance remains a gating factor for EV growth. While early adopters were often motivated by environmental benefits or incentives, mainstream buyers tend to prioritize reliability, affordability, convenience, and familiarity. Consumers who are undecided about EVs frequently cite concerns about charging access, range limitations, upfront costs, and long-term ownership uncertainty as reasons for delaying or avoiding purchase decisions. [18]

Range anxiety and charging accessibility continue to loom large in consumer decision-making, even as average vehicle range improves. Surveys show that consumers often overestimate how frequently they will need public charging and underestimate real-world EV range, particularly in cold weather or highway driving scenarios.[19] These concerns are more acute for buyers without access to home charging and those living in regions with lower public charger density.

Cost perceptions also remain a barrier. Although total cost of ownership for EVs can be competitive with – or lower than – ICE vehicles due to lower fuel and maintenance costs[20], higher upfront prices and the loss of federal incentives have heightened price sensitivity. This disconnect between actual and perceived affordability highlights the importance of clear, credible consumer education, particularly at the dealership level, where purchase decisions are finalized..[21]



[22]

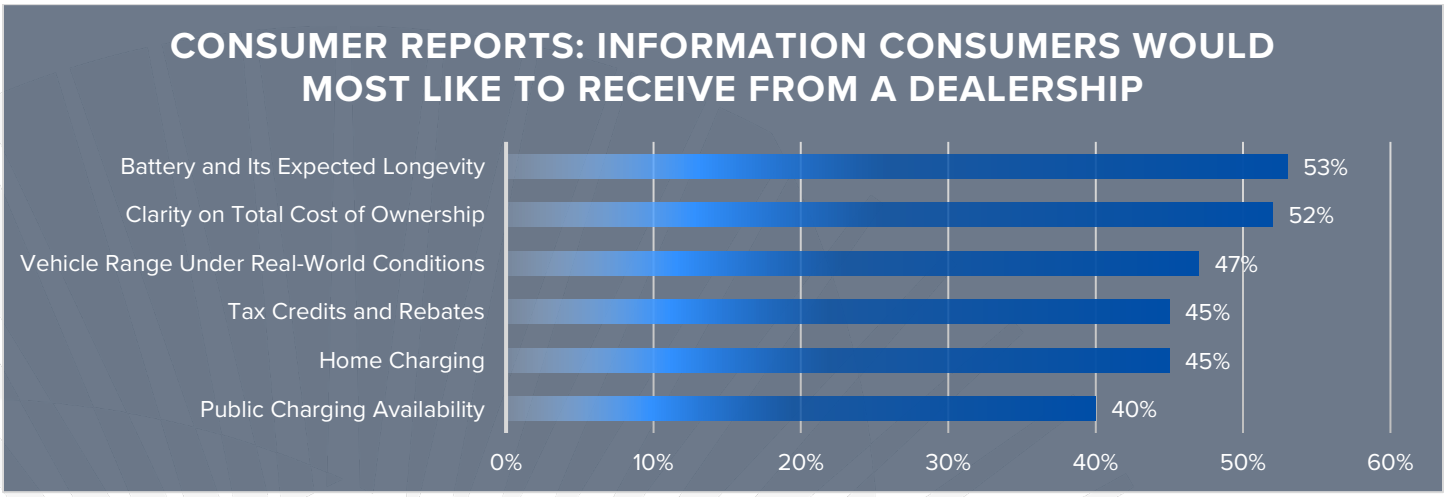
[17] National Automobile Dealers Association, Electric & Hybrid Vehicles, Accessed 1/12/2026
[18] McKinsey, "New Twists In The Electric-Vehicle Transition: A Consumer Perspective," 4/22/2025
[19] Deloitte Insights, "2026 Global Automotive Consumer Study," January 2026
[20] Keith Barry, "Find an Efficient Vehicle That's Right for You," Consumer Reports, 12/6/2025
[21] Cars.Com, "Here Are the 11 Cheapest Electric Vehicles You Can Buy," 12/12/2025
[22] Deloitte Insights, "2026 Global Automotive Consumer Study," January 2026

These findings suggest that consumer hesitation is not driven by a lack of interest alone, but by information gaps that dealerships are well positioned to address.

The Dealer's Role in Educating Buyers

Dealerships serve as a critical interface for translating EV technology into consumer-relevant benefits. Sales staff are often the first – and most trusted – source of information on how EVs compare to ICE vehicles in everyday use. Effective dealer engagement can help contextualize concerns around range, charging access, and affordability, particularly for consumers transitioning from conventional vehicles.[23]

Addressing resistance tied to familiarity with ICE vehicles remains an ongoing challenge. Longstanding refueling habits, perceptions of reliability, and uncertainty about new technologies can reinforce consumer inertia. Dealers that proactively explain EV ownership in practical terms—rather than focusing solely on technology—are better positioned to overcome this resistance.[24]



[25]

Strategies to Boost Consumer Confidence

Training and education are among the most effective tools for improving consumer confidence in EVs. The National Automobile Dealers Association (NADA), in collaboration with the Center for Sustainable Energy (CSE), has launched ElectrifIQ, a national EV training and certification program designed to equip dealership staff with the knowledge needed to sell and support EVs effectively. The program focuses on charging, incentives, cost of ownership, and customer communication strategies to support mass-market adoption.[26]

Similarly, Plug In America's PlugStar training program provides dealership staff with EV-specific education and certification, helping ensure consistent, accurate messaging to consumers across markets.[27]

Test drives also play a meaningful role in overcoming skepticism. Data from EV experience and satisfaction studies indicate that hands-on exposure is associated with improved consumer perceptions of EV performance, acceleration, and drivability, often exceeding expectations formed prior to driving the vehicle. For many consumers, test drives serve as a turning point in reassessing EVs as viable, everyday vehicles.[28] [29] [30]

[23] Liz Najam, "EV Shoppers Have Range Questions That Dealers Can Answer," Recurrent, 11/3/2025
[24] Maritz, "Empowering EV Programs Through Dealership Engagement," Accessed 1/13/2026
[25] Consumer Reports, Press Release, "New Consumer Reports Survey: Americans Want Information About Cleaner Vehicles at Dealerships," 10/23/2024
[26] ElectrifIQ, https://www.electrifiq.org/, Accessed 1/13/2026
[27] PlugIn America, https://pluginamerica.org/plugstar/#dealers, Accessed 1/13/2026
[28] McKinsey, "New Twists In The Electric-Vehicle Transition: A Consumer Perspective," 4/22/2025
[29] Aimee Turner, "Test drives key to unlocking electric vehicle transition, says new research," AMOnline, 8/6/2025
[30] Consumer Reports, Press Release, "New Consumer Reports Survey: Americans Want Information About Cleaner Vehicles at Dealerships," 10/23/2024

Financing and incentive navigation remains critical even as federal incentives have sunset. State and local programs (including rebates, reduced registration fees, utility incentives, free or discounted charging, and HOV lane access – pending reauthorization) continue to influence purchase decisions, particularly in high-adoption states.[31][32] Dealerships that actively guide consumers through available incentives and financing options can help mitigate concerns about upfront costs.

Some dealerships and OEMs are also collaborating with charging providers to streamline home charging installation, integrating charger sales or referrals into the vehicle purchase process. Partnerships with companies such as ChargePoint can simplify installation logistics and reduce uncertainty for buyers, further reinforcing confidence in EV ownership.[33]

Finally, inventory availability and model choice are improving.[34] As of Q3, consumers can choose from approximately 155 EV models across powertrain options, reflecting continued growth in market offerings and increasing alignment with diverse consumer needs and price points.

Evolving Consumer Attitudes and Market Dynamics

Consumer attitudes toward EVs continue to evolve alongside broader market and technology trends. Surveys show growing interest among younger buyers, urban residents, and households with access to charging, even as adoption remains uneven across regions and demographics.[35] [36]

Advances in battery range, charging speed, and vehicle efficiency have helped improve perceptions of EV practicality, while broader exposure to EVs has contributed to increasing social acceptance of EVs as a mainstream option rather than a niche technology.

State-level policies also continue to influence consumer behavior. Incentives such as state rebates, free or discounted charging, parking benefits, and HOV lane access remain relevant in purchase decisions. As federal incentives end, these policies – and dealer awareness of them – become increasingly important in shaping consumer outcomes.

Together, these trends suggest that the next phase of EV adoption will be shaped less by awareness and more by execution at the point of sale.

Conclusion

As the EV market transitions beyond early adopters and incentive-driven growth, consumer acceptance will increasingly hinge on confidence, clarity, and trust. Dealerships occupy a pivotal position in this transition, serving as educators, advisors, and facilitators of the EV ownership experience. By investing in training, emphasizing real-world benefits, and helping consumers navigate cost, charging, and ownership considerations, dealers can play a decisive role in sustaining EV adoption in a post-incentive environment.

[31] J.D. Power, "Incentives& EV Benefits," Accessed 1/13/2026
[32] Dave Nichols, How State and Local EV Incentives Work, GreenCars, 10/6/2025
[33] Kia, https://www.kia.com/us/en/ev-dealer.html, Accessed 1/13/2026
[34] Stephanie Valdez Streaty, "EV Market Monitor – November 2025," Cox Automotive, 12/15/2025
[35] J.D. Power, Press Release, "EV Purchase Consideration Holds Steady amid Market Uncertainty, J.D. Power Finds," 5/15/2025
[36] McKinsey, "New Twists In The Electric-Vehicle Transition: A Consumer Perspective," 4/22/2025