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ELECTRIC VEHICLE QUARTERLY REPORT

FIRST QUARTER, 2026

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ELECTRIC VEHICLE QUARTERLY REPORT



FIRST QUARTER, 2026

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EDITOR'S NOTE

The first quarter of 2026 marks an important transition point for the U.S. EV market. While year-over-year comparisons remain challenging following the expiration of federal purchase incentives at the end of the third quarter of 2025, several indicators suggest the market may be beginning to stabilize. National EV market share remained below year-ago levels, but quarter-over-quarter results were considerably more balanced than those observed immediately following the incentive expiration. Approximately half of all states recorded increases in EV market share compared to the fourth quarter of 2025, and most changes were relatively modest.

At the same time, the broader EV ecosystem continues to expand. The number of EVs operating on U.S. roads neared 7.5 million during the quarter, public charging infrastructure continued to grow, and the ratio of EVs to public charging ports remained essentially unchanged.

This quarter, we spotlight how optimized charging can improve EV affordability and help consumers save on their electricity bills through a more efficient use of the electric grid.

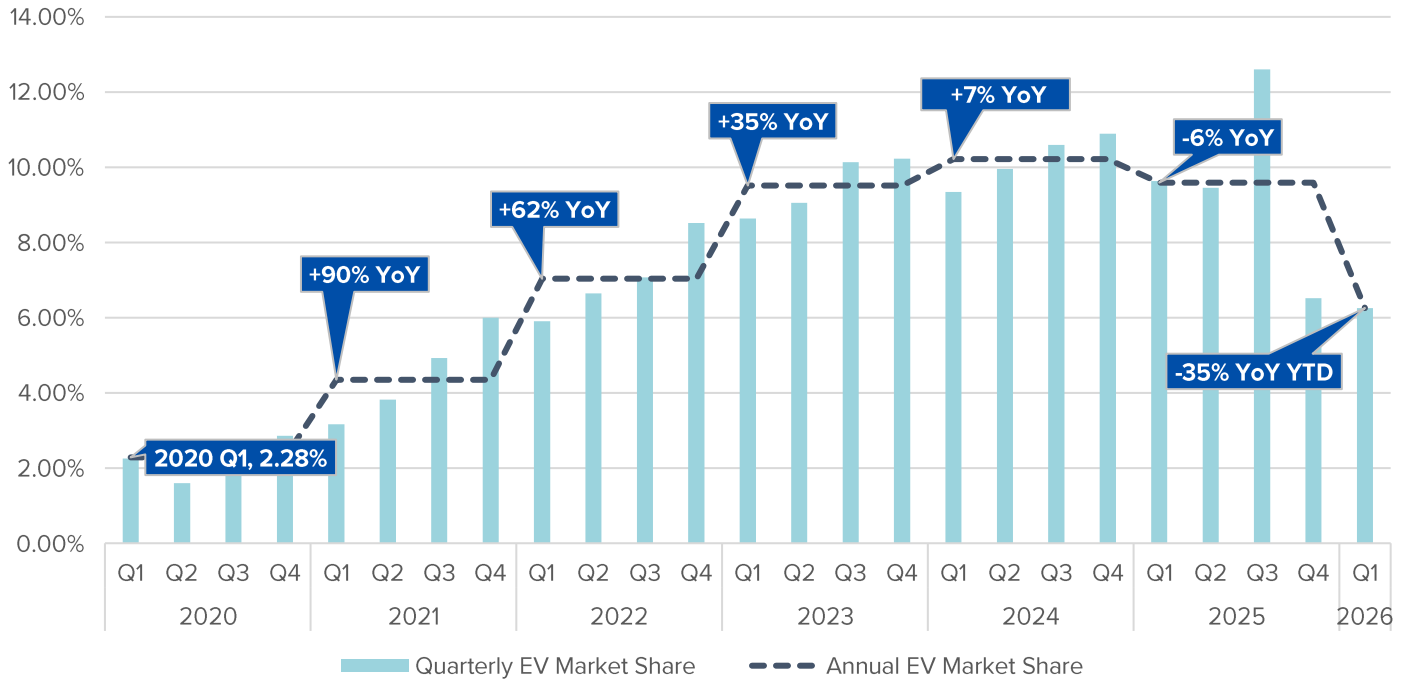
While it remains too early to determine whether the market has fully stabilized, the first quarter's results suggest the sharp adjustment experienced in late 2025 may be giving way to a more measured phase of growth and adoption increasingly driven by consumer demand and market fundamentals rather than government incentives.

ELECTRIC VEHICLE SALES OVERVIEW

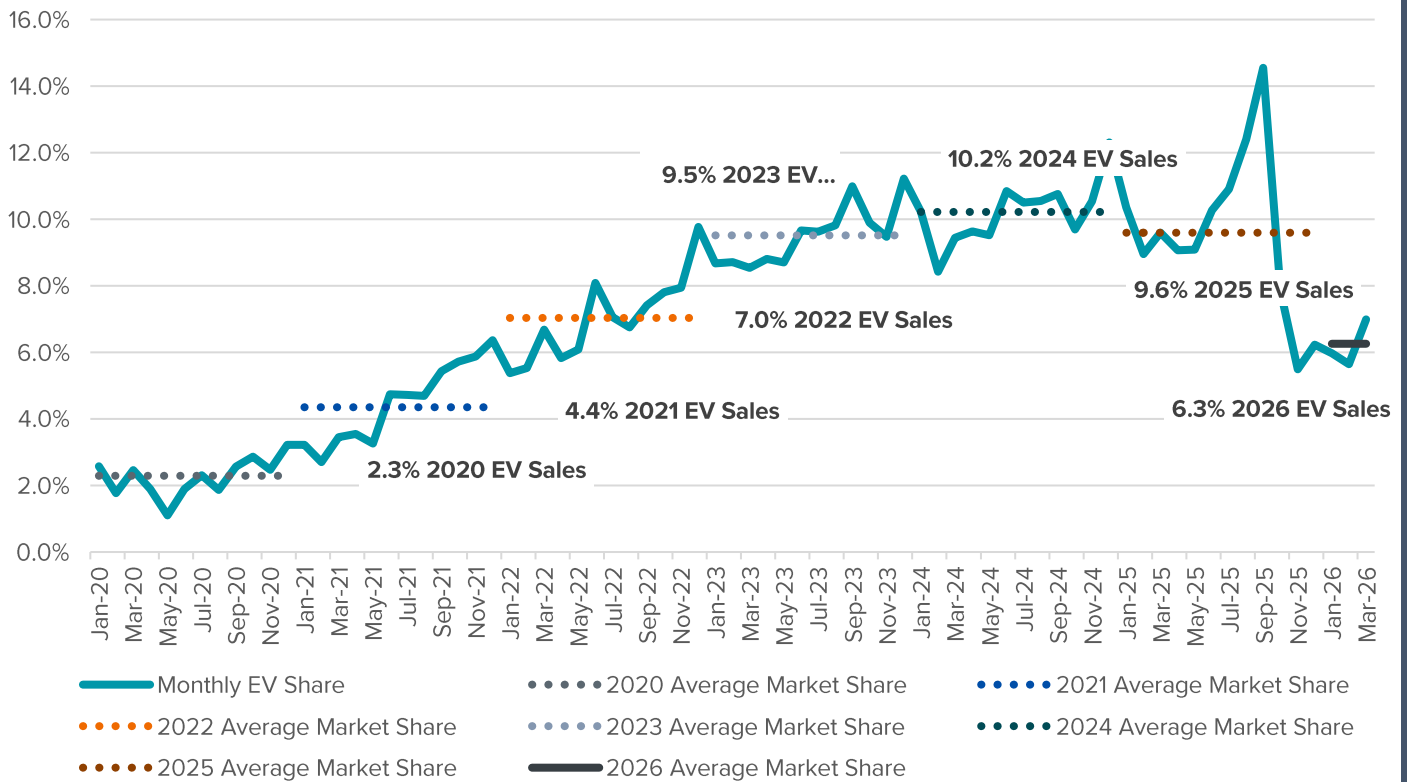
FIRST QUARTER, 2026

In the first quarter of 2026, automakers sold 227,747 electric vehicles (EVs, including battery, plug-in hybrid, and fuel cell electric vehicles) in the United States, representing 6.3 percent of new light-duty vehicle sales – the lowest market share since the first quarter of 2022. This represents a 3.4 percentage-point decline from the first quarter of 2025, or roughly 148,000 fewer EV sales.

EV MARKET SHARE, QUARTERLY 2020- 2026

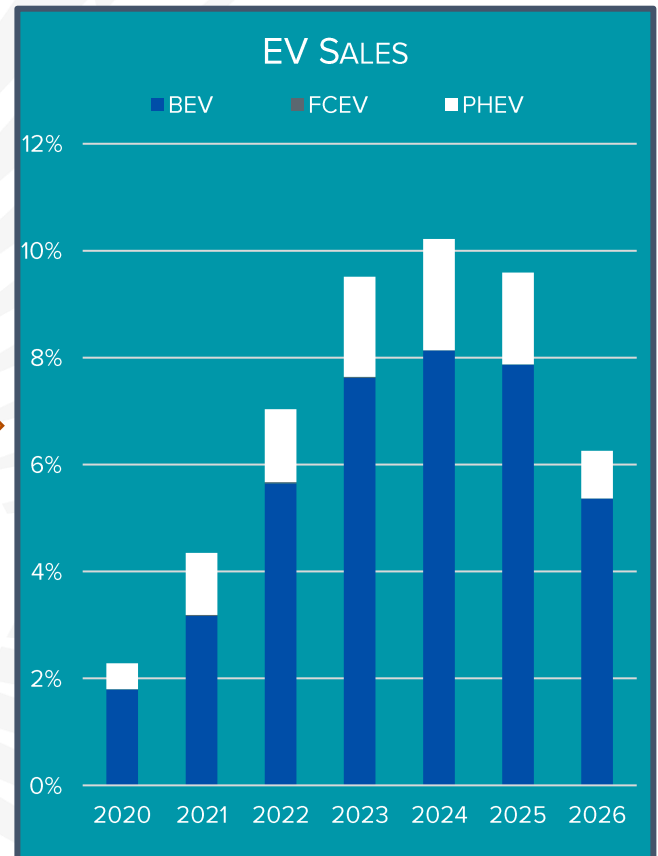
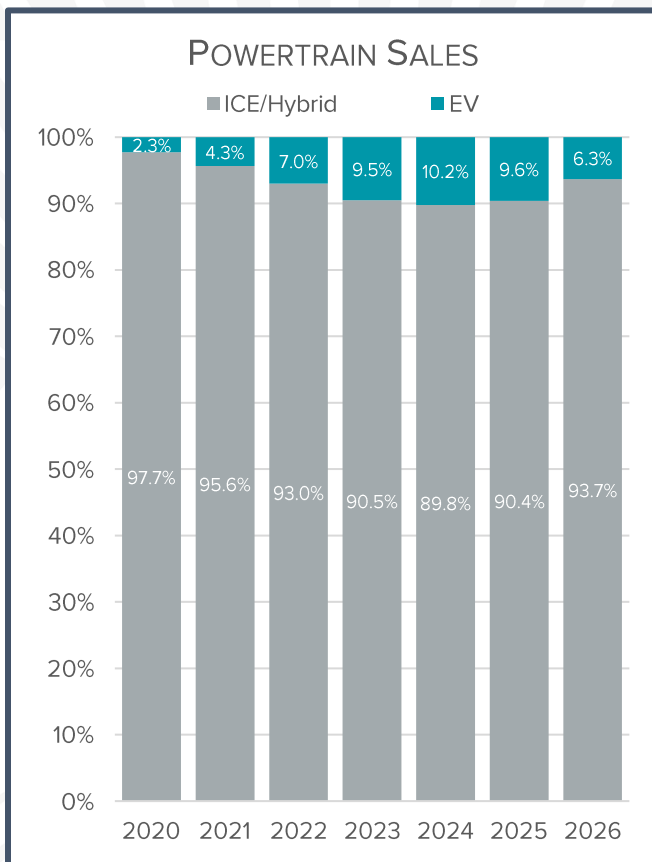
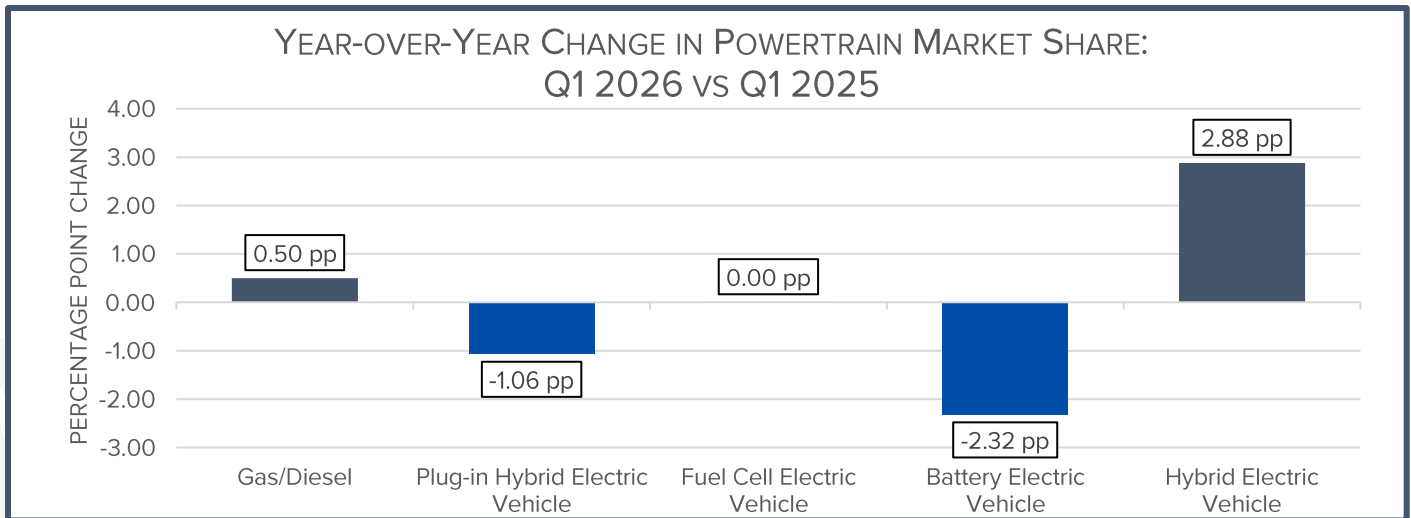


EV MARKET SHARE: JANUARY 2020 - MARCH 2026



YEAR-OVER-YEAR (Q1 2026 vs Q1 2025)

Year-over-year (YoY), EV market share declined 3.4 percentage points in Q1 2026 compared to Q1 2025. Overall light-duty vehicle sales fell 6.7 percent over the same period, while EV volume dropped 39 percent – a decline of roughly 148,000 vehicles. Internal combustion engine (ICE) vehicle market share increased by 0.5 percentage points, the second consecutive quarter reversing the prior trend of ICE contraction. Lower BEV and PHEV share was replaced by both ICE vehicles and hybrids, with hybrids posting the largest gain (+2.8 percentage points).

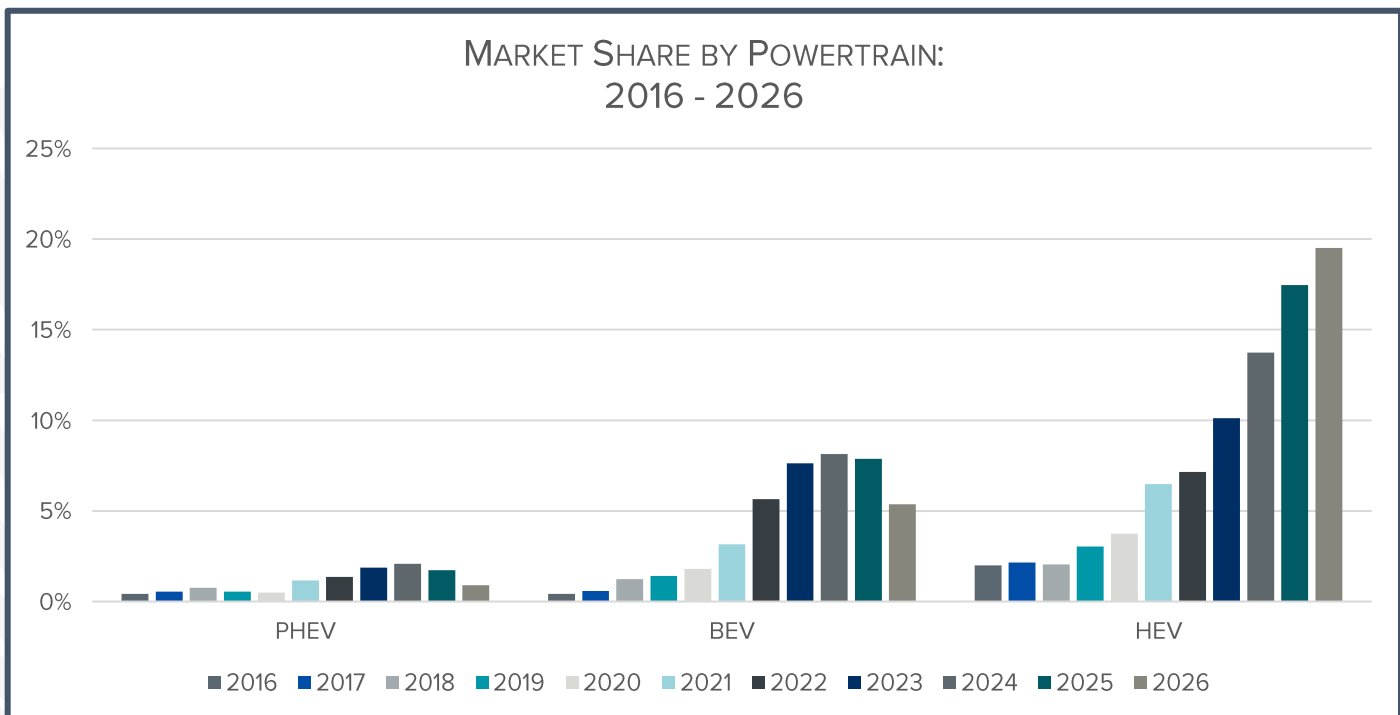


EVOLVING MARKET SHARE OF POWERTRAINS: 2016 - 2026

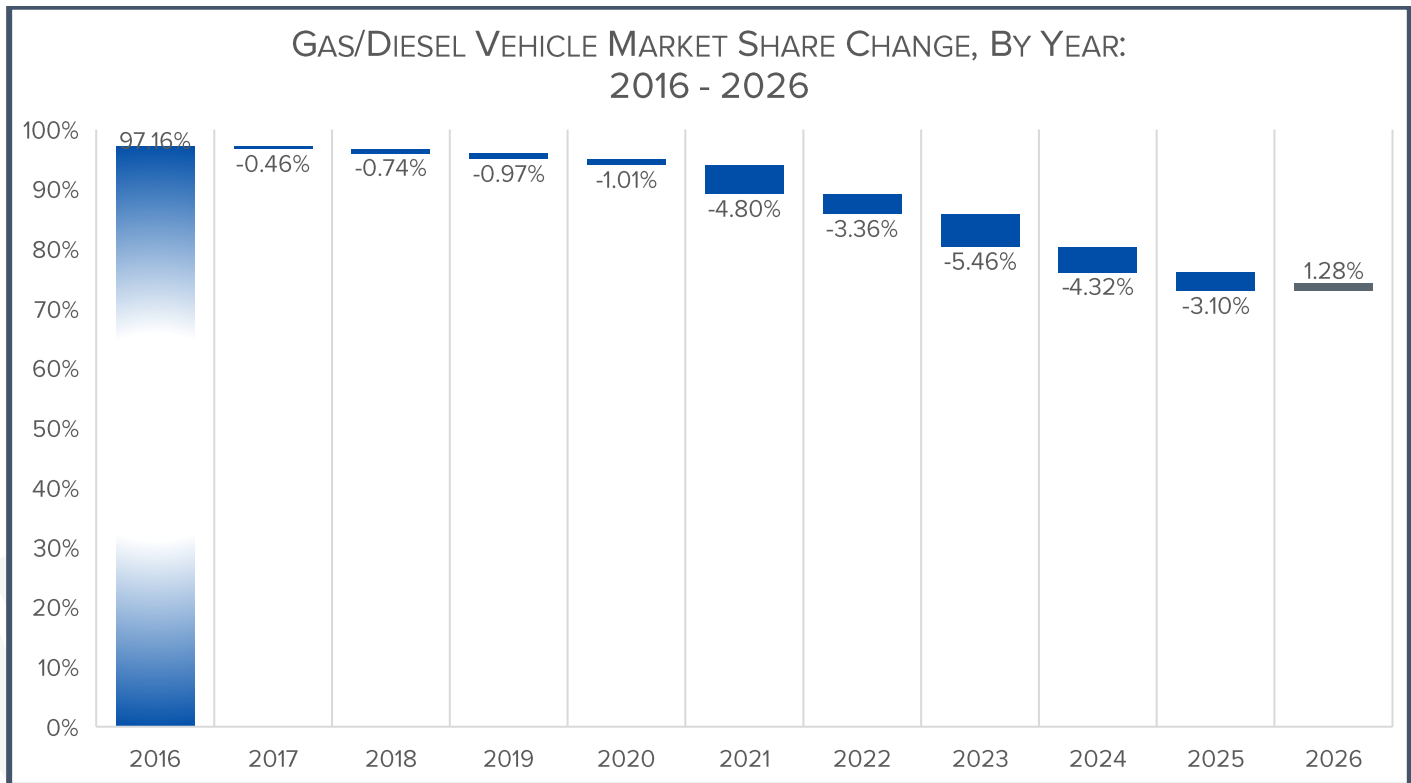
For the second consecutive quarter, ICE market share increased modestly, reflecting continued adjustments in the EV market following the expiration of federal purchase incentives at the end of the third quarter of 2025.

Despite the recent uptick, the long-term trend remains unchanged. In 2016, traditional ICE vehicles accounted for more than 97 percent of all U.S. light-duty vehicle sales. Through the first quarter of 2026, ICE share stood at 74.23 percent, a decline of 22.9 percentage points since 2016. While ICE share increased 1.28 percentage points compared to the 2025 annual average, it remains well below historical levels.

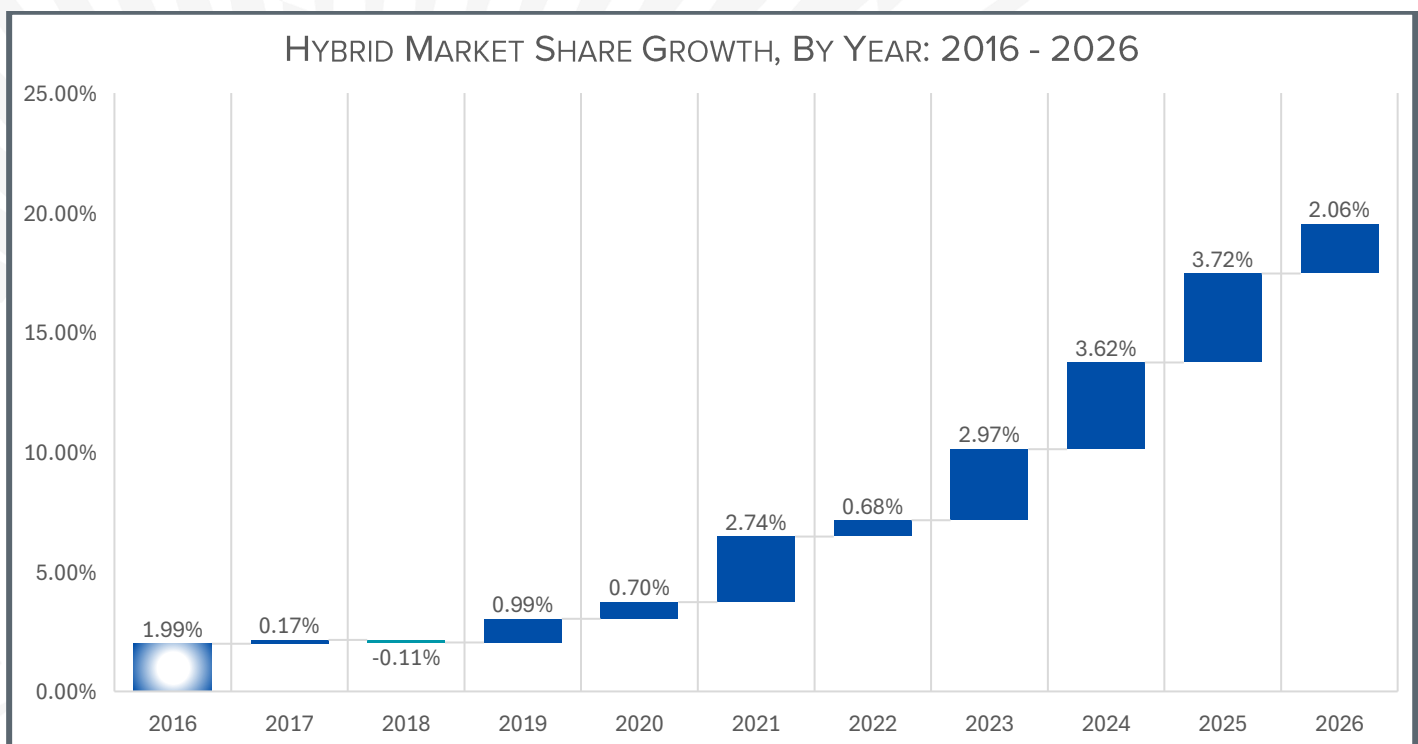
The market share lost by ICE vehicles has been absorbed primarily by alternative powertrains. Traditional (mild and strong) hybrids captured the largest gains (+17.5 percentage points) between 2016 and Q1 2026, accounting for more than three-quarters of the share lost by ICE vehicles during that period. Battery electric vehicles gained 4.9 percentage points, while plug-in hybrid electric vehicles added 0.5 percentage points.



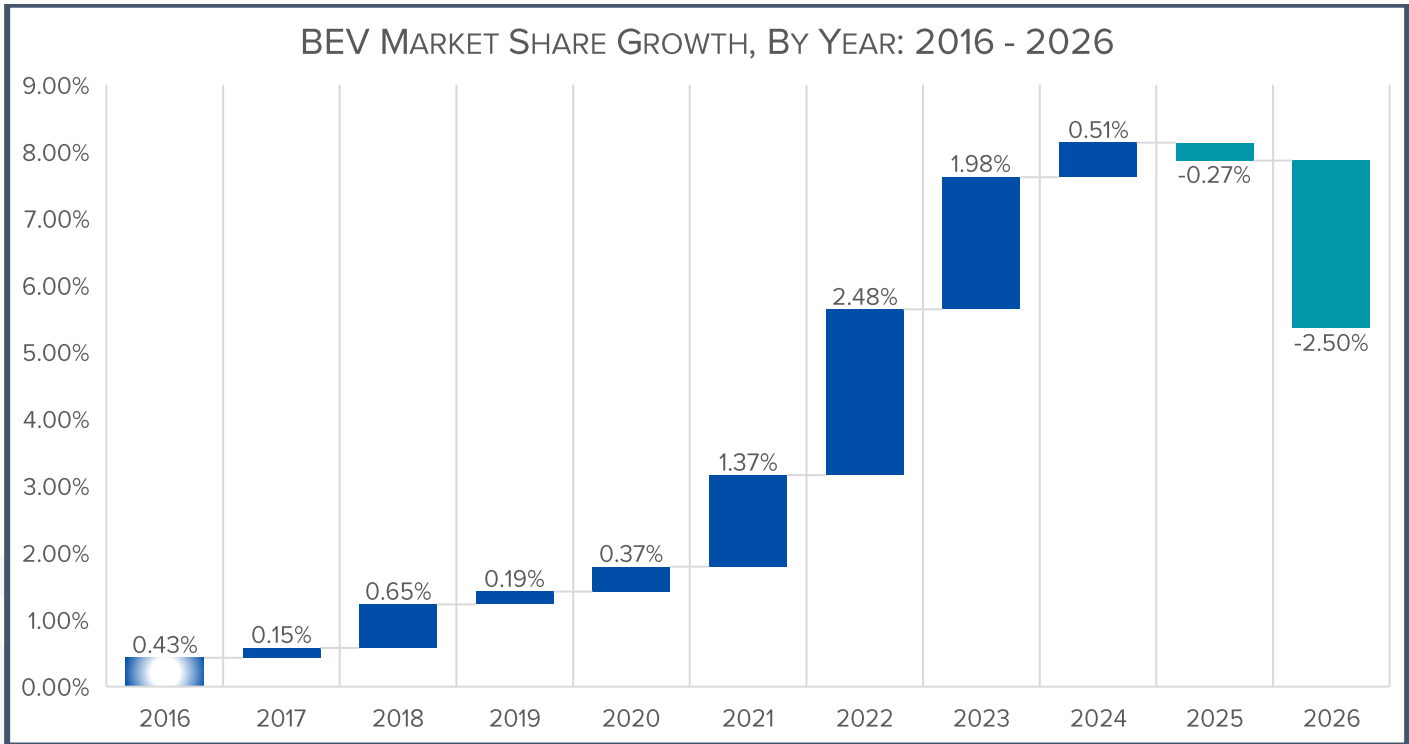
ICE market share decreased from 97 percent in 2016 to 74.2 percent through 2026 Q1 (-22.9 percentage points):



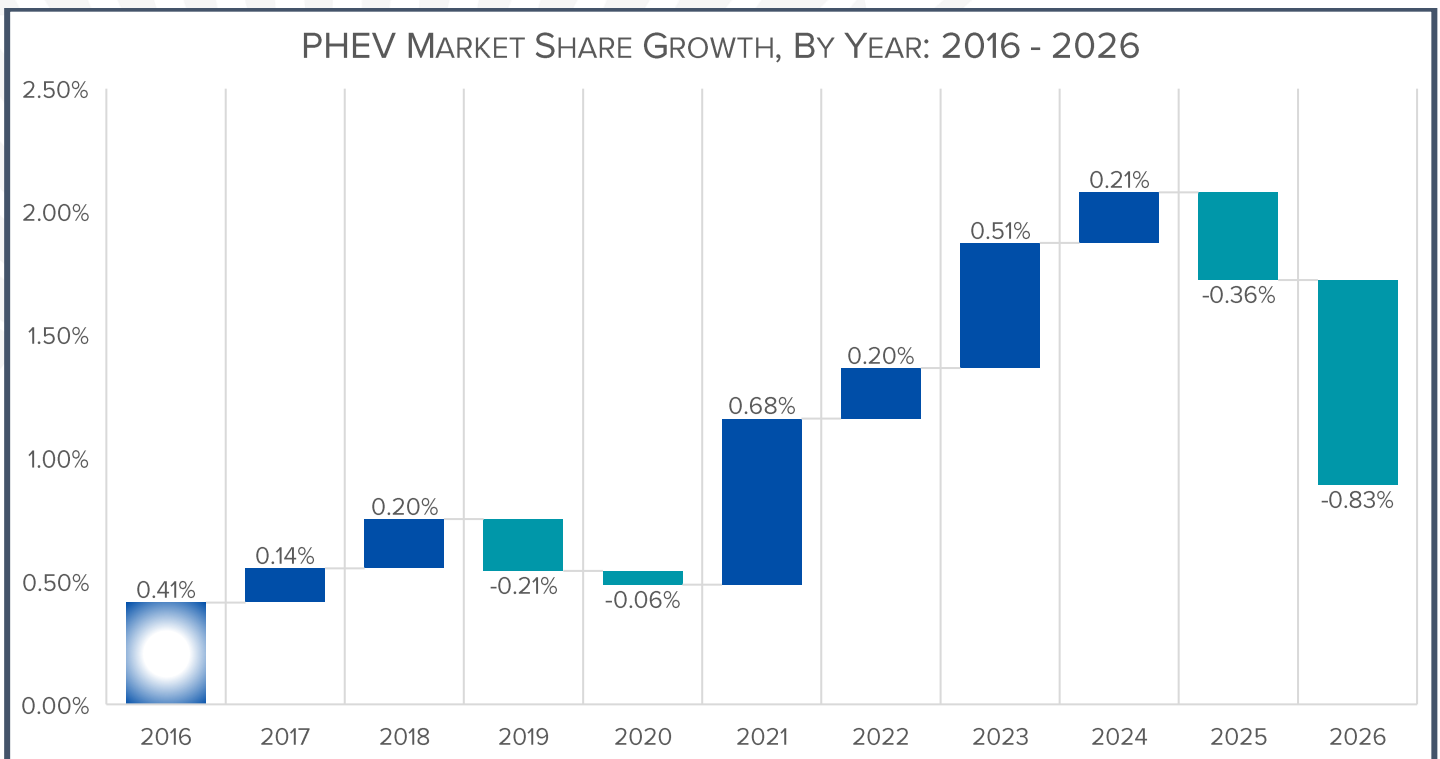
Hybrid market share grew from 2 percent in 2016 to 19.5 percent through 2026 Q1 (+17.5 percentage points):



BEV market share grew from .43 percent in 2016 to 5.36 percent through 2026 Q1 (+4.9 percentage points):



PHEV market share grew from .41 percent in 2016 to 0.9 percent through 2026 Q1 (+0.5 percentage points):



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, 2016 – March 31, 2026

[SEE ADDITIONAL HISTORIC DATA ON EV SALES HERE](#)

ELECTRIC VEHICLE SALES BY SEGMENT

While passenger cars once dominated the EV market, manufacturers have expanded vehicle offerings to better align with consumer preferences. Utility vehicles (UVs) now account for a growing share of available EV models, and while electric pickup trucks were a later addition to the market, with their commercial debut occurring in September 2021, six models are currently available.

The number of EV models available for sale declined from 164 at the end of 2025 to 154 in the first quarter of 2026, marking a departure from the steady expansion in model availability seen over the past decade. Much of the decline occurred in passenger car offerings, which fell from 52 models to 46 during the quarter. Despite the reduction, manufacturers continue to offer a broad range of vehicle types, with light trucks (UVs, minivans, and pickups) remaining the dominant segment of the EV market.

As a result, non-car segments continue to account for the vast majority of EV sales. In the first quarter of 2026, light trucks comprised 86 percent of the EV market, the highest share on record.

Quarterly sales of BEV and PHEV UVs have grown from approximately 19 percent of EV sales at the start of 2020 to 80 percent in the first quarter of 2026, also a record high and up 7 percentage points from Q4 2025. While overall EV sales have moderated following the expiration of federal purchase incentives, consumer preferences remain concentrated in utility vehicles, mirroring broader trends across the U.S. light-duty vehicle market.

EV MODEL AVAILABILITY

154 Vehicle Models Sold in Q1 2026:

97 Battery Electric Vehicles

- 22 Cars
- 58 Utility Vehicles
- 6 Pickups
- 11 Vans*

55 Plug-in Hybrid Vehicles

- 23 Cars
- 31 Utility Vehicles
- 1 Van

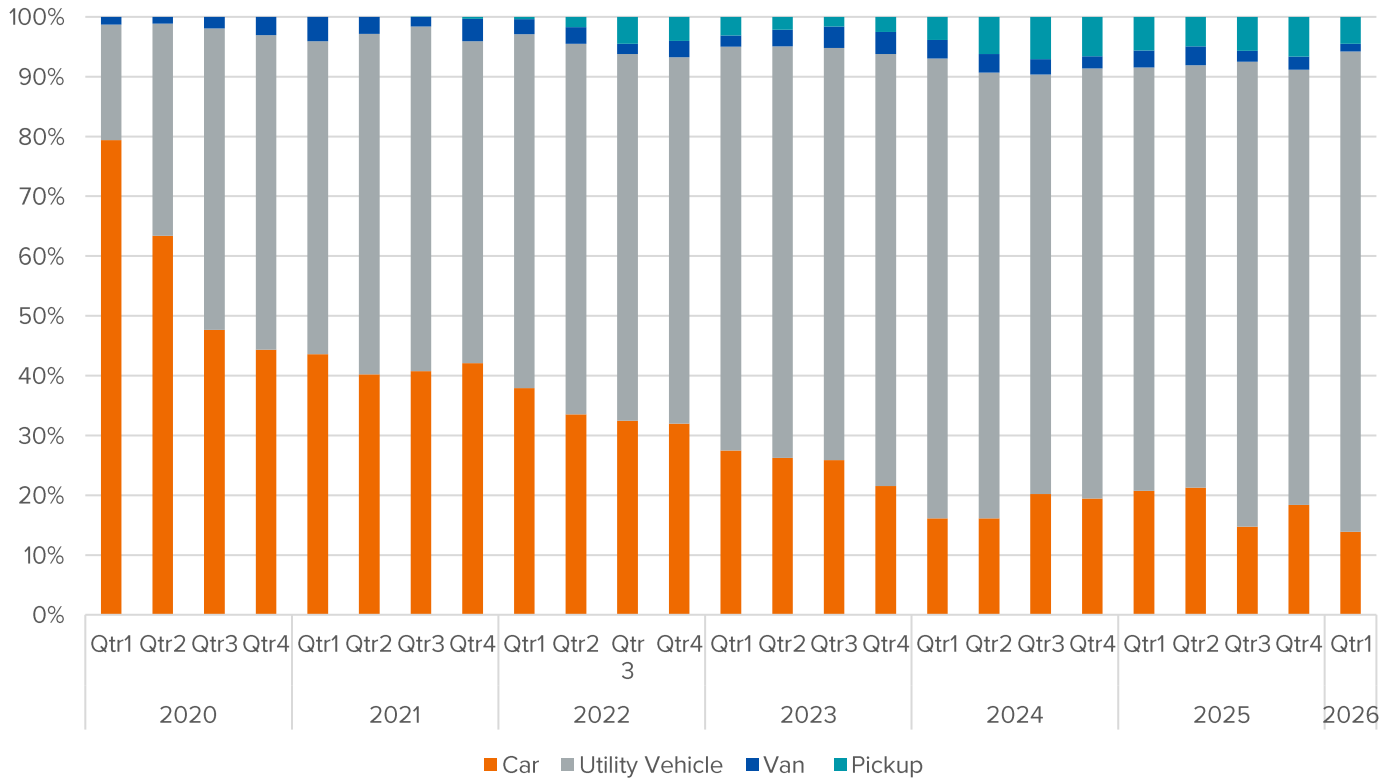
2 Fuel Cell Electric Vehicles**

- 1 Car
- 1 Utility Vehicle

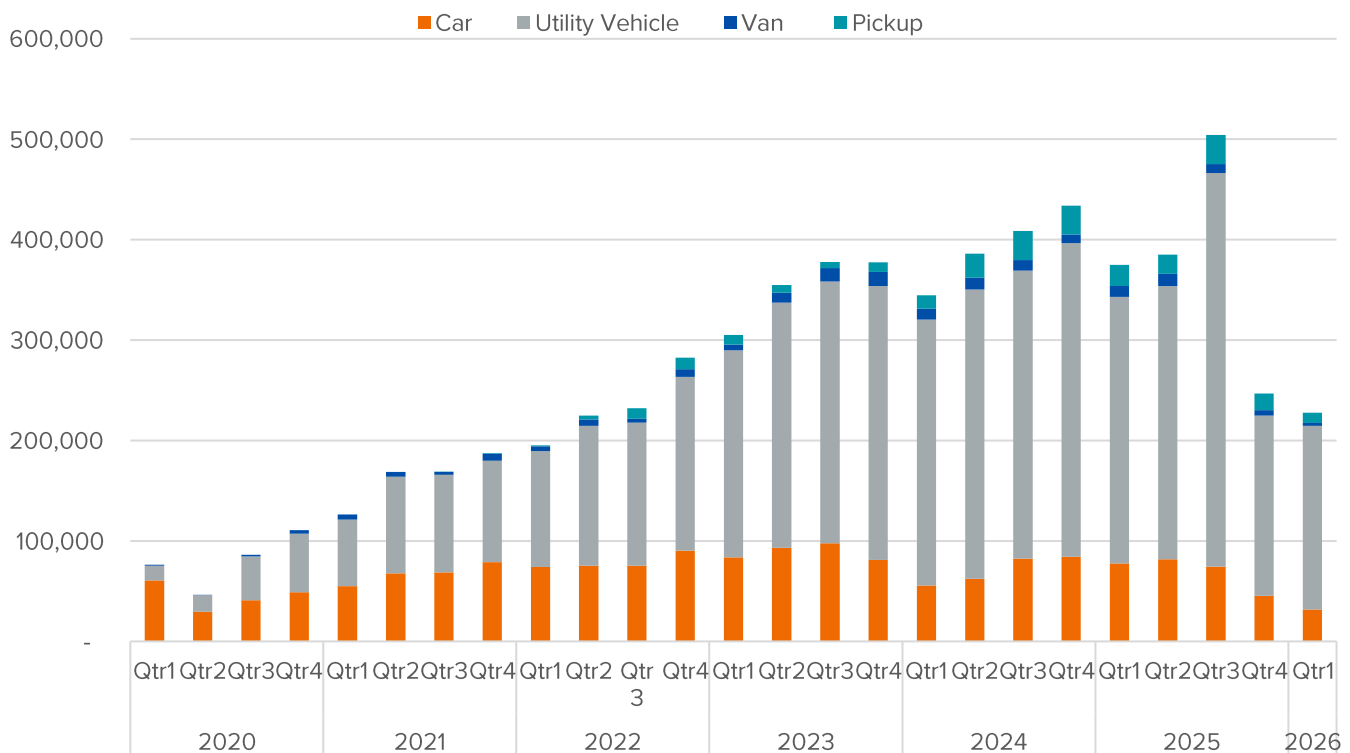
**Includes some commercial vehicles*

***Includes Plug-in Hybrid Fuel Cell*

SHARE OF EV SALES BY SEGMENT, QUARTERLY



EV SALES BY SEGMENT, QUARTERLY



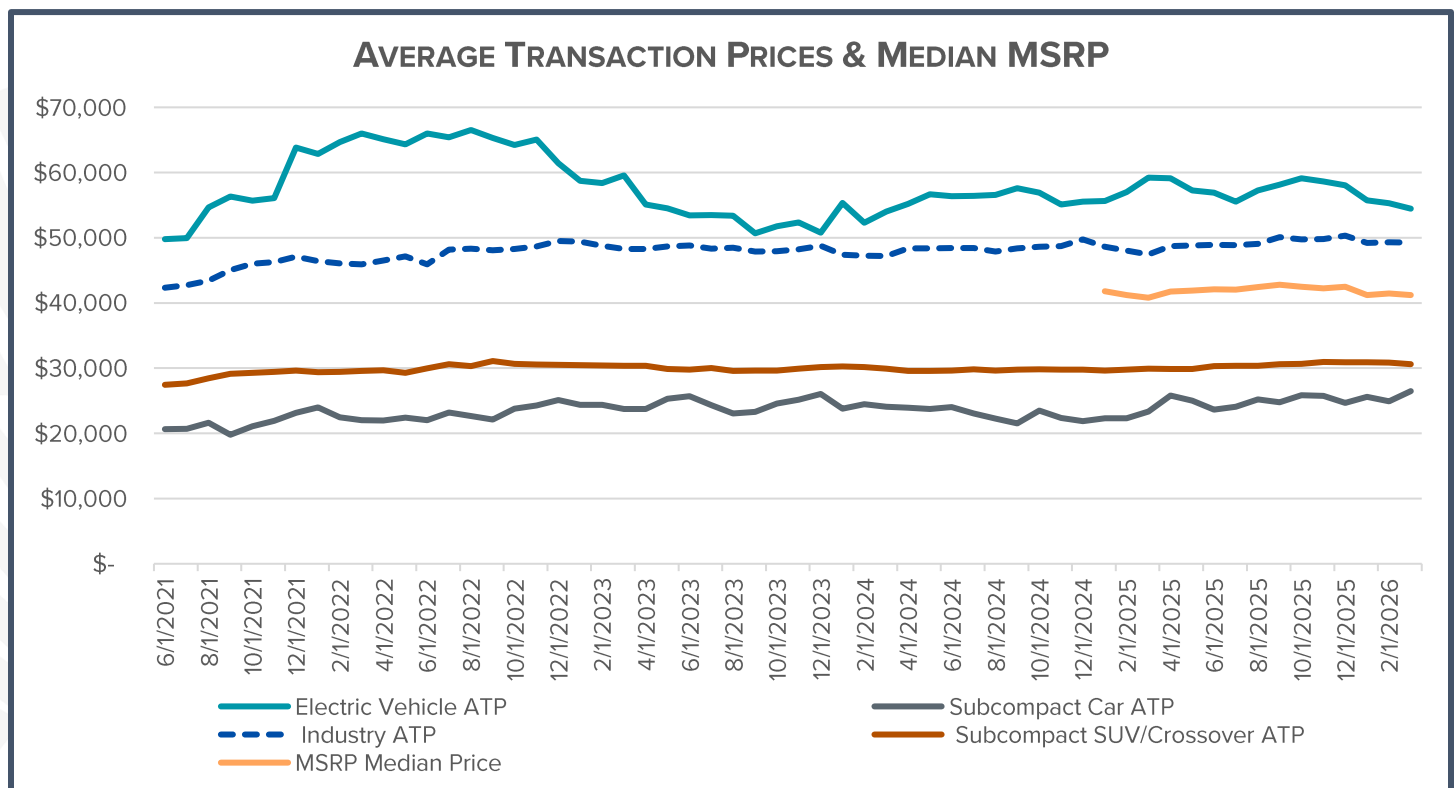
Source: Figures compiled by Alliance for Automotive Innovation with new registrations for retail and fleet data provided by S&P Global Mobility covering January 1, 2020 – March 31, 2026

ELECTRIC VEHICLE TRANSACTION PRICES

EV affordability continued to improve in the first quarter of 2026. The average transaction price (ATP) for a new EV was \$54,508 in March, down 6 percent from a year earlier and more than \$10,000 below the peak reached in 2022. Manufacturer incentives remained elevated, averaging nearly \$8,000 per vehicle and accounting for 14.6 percent of the average transaction price.

As EV prices have moderated, the gap between EVs and conventional vehicles has narrowed significantly. In March, the EV price premium over comparable ICE vehicles fell to approximately \$5,800, the lowest level on record.

The used EV market also continued to become more affordable. Average used EV listing prices declined to \$34,653 in March, down 6.1 percent year over year. The price premium for used EVs narrowed to just \$1,012 compared to similar ICE vehicles, continuing a trend toward price parity in the secondary market.¹



Average transaction price Compiled from Kelley Blue Book Press Releases, June 2021 – March 2026; Median MSRP from S&P Global Mobility New Vehicle Registrations January 2025 – March 2026.

ELECTRIC VEHICLE SALES BY STATE

FOR THE FIRST QUARTER OF 2026

California continued to lead the nation in EV adoption during the first quarter of 2026, with BEVs, PHEVs, and FCEVs accounting for 17.5 percent of new light-duty vehicle registrations. Washington ranked second at 15.2 percent, while Nevada (11.6 percent) was the only other state above 10 percent market share. No other state exceeded 10 percent EV market share during the quarter.

¹ Cox Automotive, "EV Market Monitor – December 2025," 1/15/2026

Compared to the first quarter of 2025, EV market share declined in every state and the District of Columbia. Nationally, EV market share fell 3.4 percentage points to 6.3 percent of new light-duty vehicle registrations. The largest declines occurred in the District of Columbia (-14.6 percentage points), Colorado (-11.1 percentage points), New Jersey (-7.0 percentage points), Oregon (-6.6 percentage points), California (-6.2 percentage points), and Vermont (-6.1 percentage points).

EV adoption remains heavily concentrated geographically. In the first quarter of 2026, only nine states exceeded the national average EV market share of 6.3 percent.

2026 EV MARKET SHARE BY STATE (Q1)									
1 CA	17.51%	11 NJ	6.15%	21 TX	4.78%	31 NH	3.49%	41 AL	2.68%
2 WA	15.17%	12 UT	6.14%	22 VT	4.76%	32 MT	3.42%	42 MO	2.64%
3 NV	11.62%	13 MA	6.09%	23 ID	4.59%	33 IN	3.31%	43 AR	2.11%
4 OR	9.37%	14 DC	5.95%	24 MN	4.04%	34 WI	3.15%	44 SD	2.08%
5 HI	8.41%	15 VA	5.86%	25 RI	3.90%	35 OH	3.10%	45 LA	1.94%
6 CO	8.08%	16 GA	5.30%	26 TN	3.86%	36 KS	2.92%	46 WY	1.84%
7 FL	7.10%	17 NC	5.26%	27 MI	3.75%	37 ME	2.90%	47 MS	1.71%
8 AZ	7.05%	18 DE	4.99%	28 SC	3.72%	38 NE	2.82%	48 AK	1.63%
9 MD	6.93%	19 NY	4.84%	29 NM	3.69%	39 IA	2.74%	49 WV	1.33%
10 CT	6.21%	20 IL	4.82%	30 PA	3.65%	40 KY	2.69%	50 ND	1.24%
								51 OK	0.85%

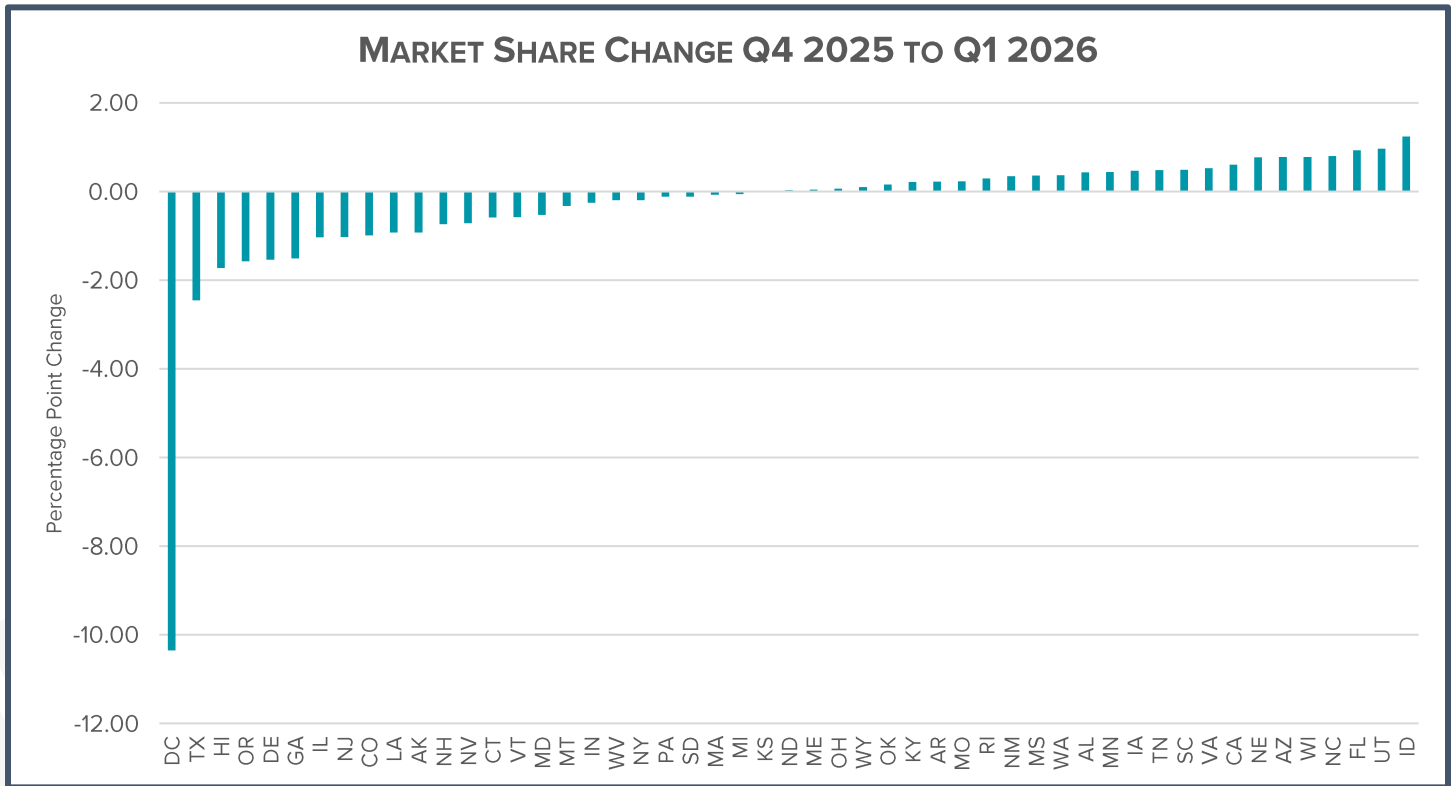
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While year-over-year comparisons remain negative, quarter-over-quarter results suggest the EV market may be beginning to stabilize following the sharp declines experienced after the expiration of federal purchase incentives.

Compared to the fourth quarter of 2025, EV market share increased in 26 states and decreased in 23 states and the District of Columbia (one state was unchanged). Outside of the District of Columbia, most changes were relatively modest, generally within two percentage points of the prior quarter.

Several leading EV markets posted gains during the quarter, including California, Washington, Arizona, and Utah. Idaho recorded the largest increase in EV market share, gaining approximately 1.1 percentage points from the previous quarter.

While it is too early to determine whether the market has fully stabilized, the first quarter's results suggest the sharp declines experienced immediately following the expiration of federal purchase incentives have begun to moderate. EV market share increased in roughly half of all states, and most quarter-over-quarter changes were relatively small, indicating the market may be settling into a new equilibrium.



Note: Washington, DC's decline in EV market share during Q1 2026 appears to have been heavily influenced by an unusually large increase in ICE fleet registrations. Fleet registrations more than doubled compared with all of 2025, with nearly 88% concentrated in just five SUV and pickup models, suggesting the results were driven by a small number of large fleet procurements rather than a broad shift in consumer demand.

First Quarter 2026, New Light-Duty Vehicle Registrations By Powertrain					Change In Market Share (2026 Q1 vs 2025 Q1), 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	0.27%	1.36%	0.00%	1.63%	-0.33	-1.44	0.00	-1.77
AL	0.35%	2.34%	0.00%	2.68%	-0.42	-0.48	0.00	-0.90
AR	0.30%	1.81%	0.00%	2.11%	-0.29	-0.32	0.00	-0.61
AZ	0.91%	6.14%	0.00%	7.05%	-0.47	-1.32	0.00	-1.80
CA	2.06%	15.42%	0.02%	17.51%	-1.70	-4.48	0.00	-6.17
CO	1.35%	6.73%	0.00%	8.08%	-3.34	-7.79	0.00	-11.12
CT	1.28%	4.93%	0.00%	6.21%	-2.20	-2.63	0.00	-4.84
DC	1.38%	4.57%	0.00%	5.95%	-3.21	-11.42	0.00	-14.64
DE	1.15%	3.84%	0.00%	4.99%	-1.33	-3.86	0.00	-5.20
FL	0.85%	6.25%	0.00%	7.10%	-0.71	-2.25	0.00	-2.96
GA	0.64%	4.66%	0.00%	5.30%	-0.51	-2.85	0.00	-3.36
HI	0.85%	7.56%	0.00%	8.41%	-0.50	-2.20	0.00	-2.70
IA	0.55%	2.19%	0.00%	2.74%	-0.63	-0.51	0.00	-1.14
ID	0.88%	3.71%	0.00%	4.59%	-0.60	0.53	0.00	-0.07
IL	0.90%	3.92%	0.00%	4.82%	-0.72	-2.69	0.00	-3.41
IN	0.48%	2.84%	0.00%	3.31%	-0.70	-1.23	0.00	-1.93
KS	0.53%	2.39%	0.00%	2.92%	-0.67	-1.34	0.00	-2.01
KY	0.42%	2.27%	0.00%	2.69%	-0.65	-0.52	0.00	-1.16
LA	0.22%	1.72%	0.00%	1.94%	-0.26	-0.63	0.00	-0.89
MA	1.22%	4.87%	0.00%	6.09%	-2.24	-2.48	0.00	-4.73
MD	1.13%	5.80%	0.00%	6.93%	-1.35	-1.50	0.00	-2.86
ME	0.87%	2.03%	0.00%	2.90%	-1.01	-1.31	0.00	-2.32
MI	0.55%	3.20%	0.00%	3.75%	-1.49	-2.69	0.00	-4.18
MN	0.70%	3.34%	0.00%	4.04%	-0.99	-1.21	0.00	-2.20
MO	0.47%	2.17%	0.00%	2.64%	-0.31	-0.75	0.00	-1.06
MS	0.26%	1.45%	0.00%	1.71%	-0.15	-0.30	0.00	-0.45
MT	1.06%	2.36%	0.00%	3.42%	-0.45	0.03	0.00	-0.41
NC	0.82%	4.43%	0.00%	5.26%	-0.77	-0.57	0.00	-1.34
ND	0.18%	1.06%	0.00%	1.24%	-0.32	-0.33	0.00	-0.65
NE	0.61%	2.21%	0.00%	2.82%	-0.48	-0.85	0.00	-1.33
NH	0.78%	2.71%	0.00%	3.49%	-1.39	-1.01	0.00	-2.40
NJ	0.97%	5.18%	0.00%	6.15%	-1.91	-5.04	0.00	-6.95
NM	0.77%	2.92%	0.00%	3.69%	-0.24	-1.04	0.00	-1.28
NV	1.13%	10.49%	0.00%	11.62%	-0.68	-2.94	0.00	-3.62
NY	1.12%	3.72%	0.00%	4.84%	-2.17	-2.32	0.00	-4.48
OH	0.50%	2.59%	0.00%	3.10%	-0.84	-1.20	0.00	-2.04
OK	0.32%	0.53%	0.00%	0.85%	0.14	-0.32	0.00	-0.18
OR	1.53%	7.84%	0.00%	9.37%	-2.32	-4.28	0.00	-6.60
PA	0.74%	2.91%	0.00%	3.65%	-1.42	-1.68	0.00	-3.10
RI	0.97%	2.93%	0.00%	3.90%	-1.33	-1.71	0.00	-3.04
SC	0.57%	3.15%	0.00%	3.72%	-0.64	-0.34	0.00	-0.98
SD	0.81%	1.27%	0.00%	2.08%	-0.85	-0.53	0.00	-1.39
TN	0.54%	3.32%	0.00%	3.86%	-0.47	-0.48	0.00	-0.95
TX	0.55%	4.22%	0.00%	4.78%	-0.43	-1.78	0.00	-2.21
UT	0.84%	5.30%	0.00%	6.14%	-1.02	-1.94	0.00	-2.96
VA	0.86%	5.00%	0.00%	5.86%	-1.09	-0.91	0.00	-2.00
VT	1.19%	3.57%	0.00%	4.76%	-2.09	-4.00	0.00	-6.09
WA	1.58%	13.59%	0.00%	15.17%	-1.92	-2.64	0.00	-4.56
WI	0.56%	2.59%	0.00%	3.15%	-0.62	-0.71	0.00	-1.33
WV	0.35%	0.98%	0.00%	1.33%	-0.45	-0.60	0.00	-1.05
WY	0.49%	1.35%	0.00%	1.84%	-0.22	-0.21	0.00	-0.43
U.S.	0.89%	5.36%	0.00%	6.26%	-1.06	-2.31	0.00	-3.37

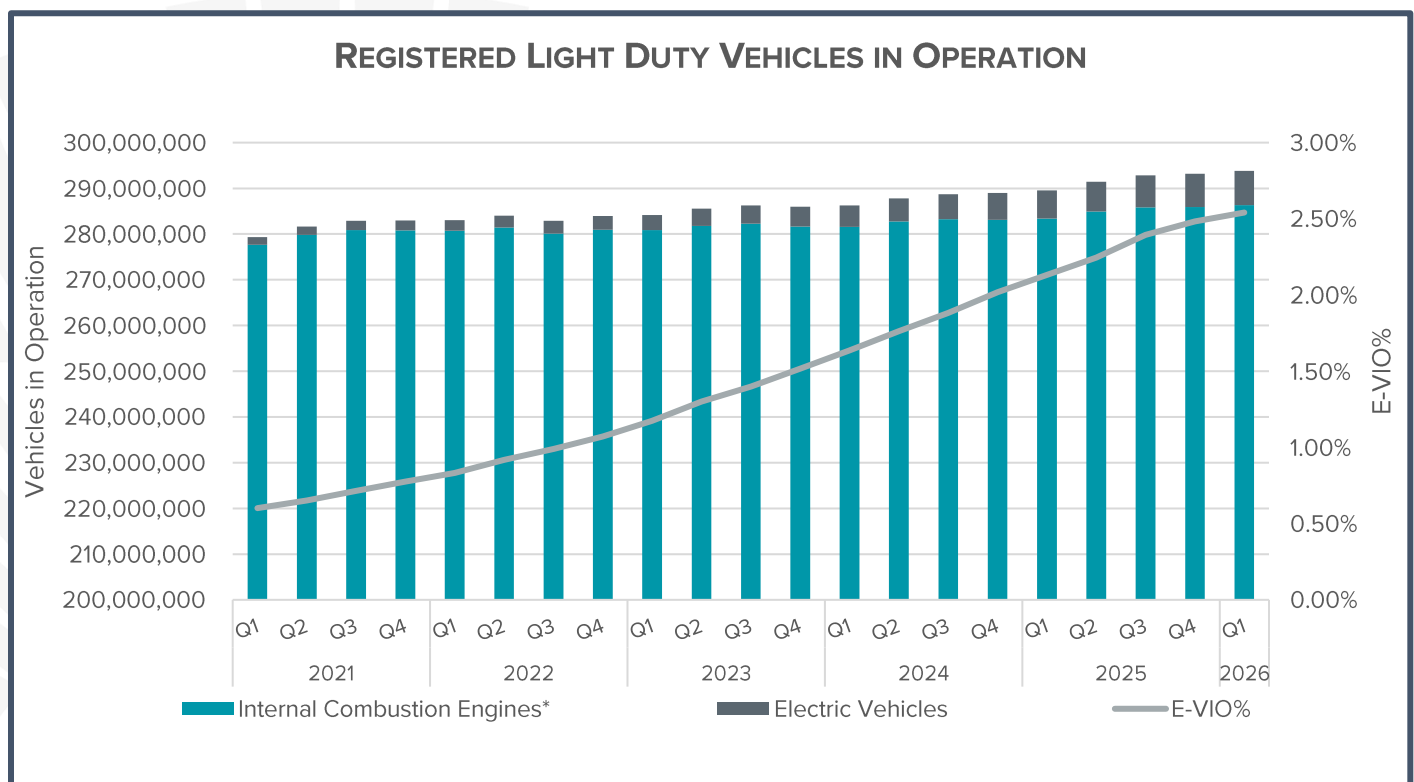
Source: Figures compiled by Alliance for Automotive Innovation with new registrations for retail and fleet data provided by S&P Global Mobility covering January 1 – March 31, 2025, and January 1 – March 31, 2026

REGISTRATIONS AND CHARGING/REFUELING

Share of Registered EVs in U.S. Light-Duty Fleet Continues to Increase. Although new EV sales declined significantly following the expiration of federal purchase incentives, the existing EV fleet continues to grow as new sales add to an already large base of vehicles in operation. At the end of the first quarter of 2026, there were approximately 7.5 million EVs in operation in the United States, representing 2.54 percent of all light-duty vehicles in operation (VIO), up from 2.48 percent at the end of 2025.

EVs accounted for more than 1 percent of the U.S. light-duty fleet for the first time at the end of 2022 and surpassed 2 percent at the end of 2024. Since the first quarter of 2021, the number of EVs in operation has increased more than fourfold, growing from 1.7 million vehicles to 7.5 million.

While the pace of growth has moderated alongside recent EV sales trends, the U.S. EV fleet expanded by nearly 1.3 million vehicles over the past year. EVs now account for more than one out of every forty light-duty vehicles on U.S. roads, underscoring the continued need for charging infrastructure to support the growing fleet.



[Dig Deeper with the Charging & Registration Dashboard](#)

While this report highlights national charging and registration trends, the interactive Charging & Registration Dashboard allows users to explore the data in greater detail. Analyze EV registrations and public charging infrastructure by state and county, compare urban, suburban, and rural communities, track charging deployment over time, and identify where EV adoption is outpacing charging growth. The dashboard is updated quarterly with the latest available data.

U.S. PUBLIC CHARGING INFRASTRUCTURE: OVERVIEW

Here is a snapshot of publicly available EV charging and refueling infrastructure³ available across the United States at the end of Q1 2026⁴:

Station and Charging Ports Through Q1 2026

Level 2: 65,416 Stations, 172,110 EVSE Ports

DC Fast: 14,643 Stations, 70,244 EVSE Ports

Hydrogen Refueling: 52 Stations (50 are in California)

U.S. Total: 80,059⁵ EVSE Stations, 242,354 EVSE Ports

[See Recommended Attributes for EV Charging Stations](#)

Charging Infrastructure by Unique⁶ Location

State	Locations	L2 Ports	DC Fast Ports	State	Locations	L2 Ports	DC Fast Ports
AK	73	112	99	MT	140	224	251
AL	402	805	869	NC	1,479	3,924	1,758
AR	310	824	260	ND	89	130	147
AZ	1,008	3,164	1,391	NE	259	472	230
CA	10,159	45,878	17,660	NH	226	456	322
CO	1,871	5,615	1,562	NJ	1,308	3,893	2,038
CT	1,236	3,955	749	NM	338	600	551
DC	255	1,066	59	NV	455	1,499	1,158
DE	177	422	301	NY	3,911	16,092	3,074
FL	3,267	9,590	4,660	OH	1,468	3,740	1,468
GA	1,579	5,189	2,055	OK	337	644	970
HI	300	803	181	OR	1,254	2,953	1,250
IA	400	718	570	PA	1,436	3,754	1,819
ID	208	390	278	RI	209	691	123
IL	1,328	2,993	2,455	SC	561	1,156	885
IN	571	1,170	908	SD	112	185	162
KS	364	982	363	TN	765	2,037	976
KY	335	686	410	TX	2,829	7,160	4,722
LA	247	477	384	UT	660	2,162	790
MA	2,338	8,945	1,747	VA	1,217	3,664	1,664
MD	1,376	4,014	1,422	VT	415	1,083	282
ME	493	1,229	369	WA	1,797	6,066	2,019
MI	1,487	3,794	1,553	WI	678	1,376	811
MN	886	2,084	968	WV	164	337	215

³ "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.

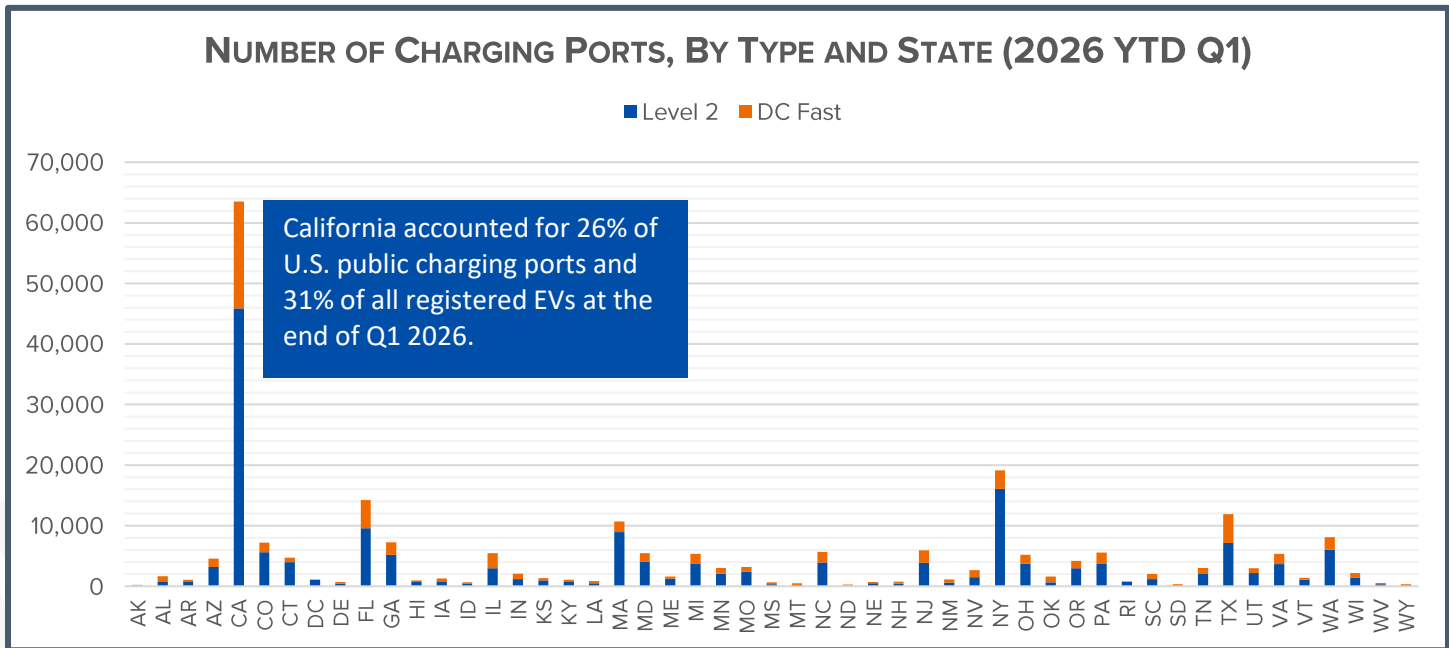
⁴ Charging information from U.S. Department of Energy Alternative Fuels Data Center, stations in operation as of March 31, 2026

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.

⁵ Some station locations have both Level 2 and DC Fast installed.

⁶ Locations denote unique addresses.

MO	784	2,399	791	WY	110	161	175
MS	186	347	320	US. Total	53,857	172,110	70,244



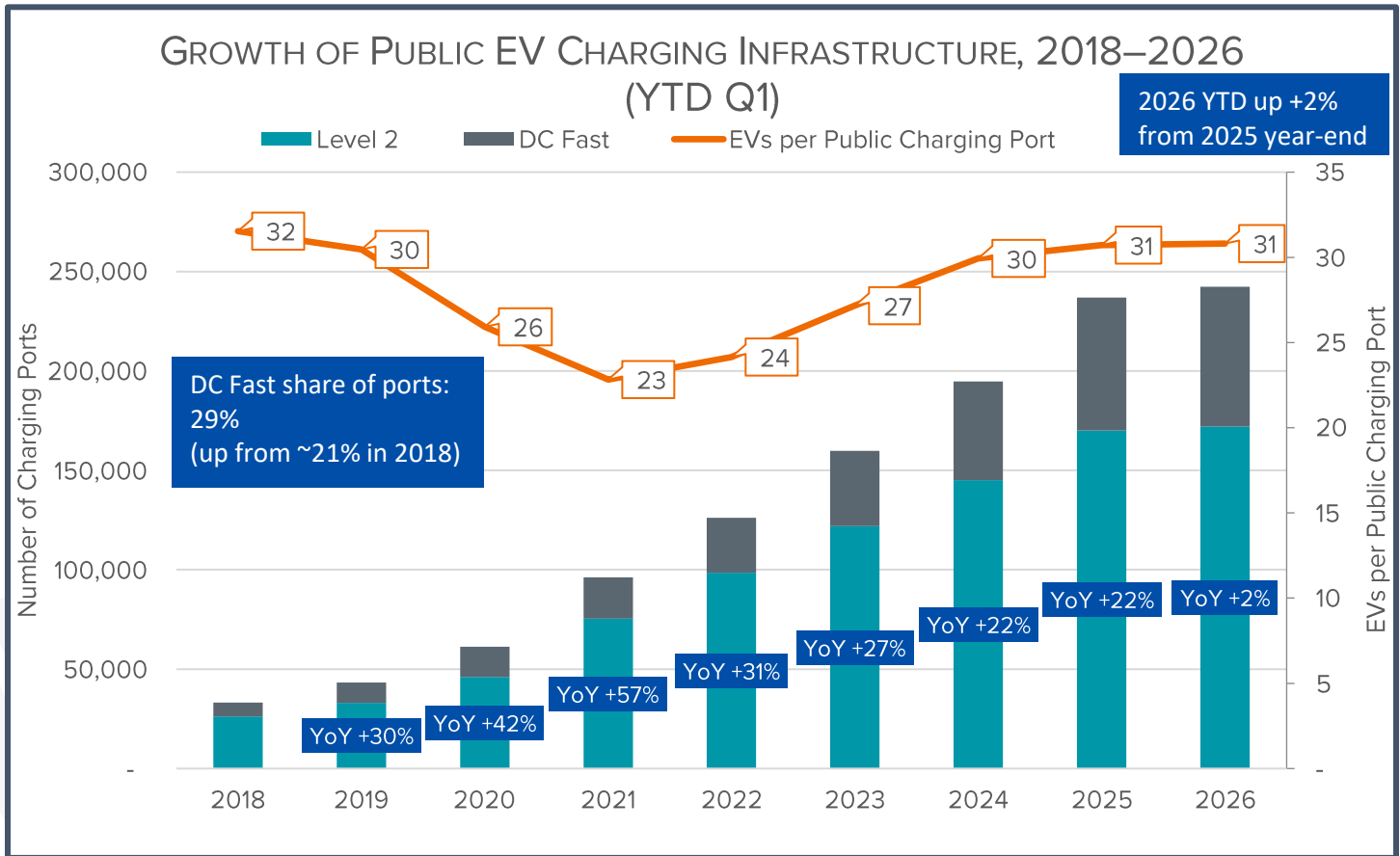
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U.S. PUBLIC CHARGING: RECENT PROGRESS

Public charging infrastructure continued to expand during the first quarter of 2026. Compared to the end of 2025, the number of public Level 2 charging ports increased by 1 percent, while DC fast charging ports grew by 5 percent. In total, public charging ports increased 2 percent during the quarter, reaching more than 242,000 ports nationwide.

Over the same period, the number of electric vehicles in operation (E-VIO) increased by 3 percent. As a result, the ratio of EVs to public charging ports remained unchanged at 31 EVs per port, suggesting charging infrastructure growth is largely keeping pace with the expanding EV fleet.

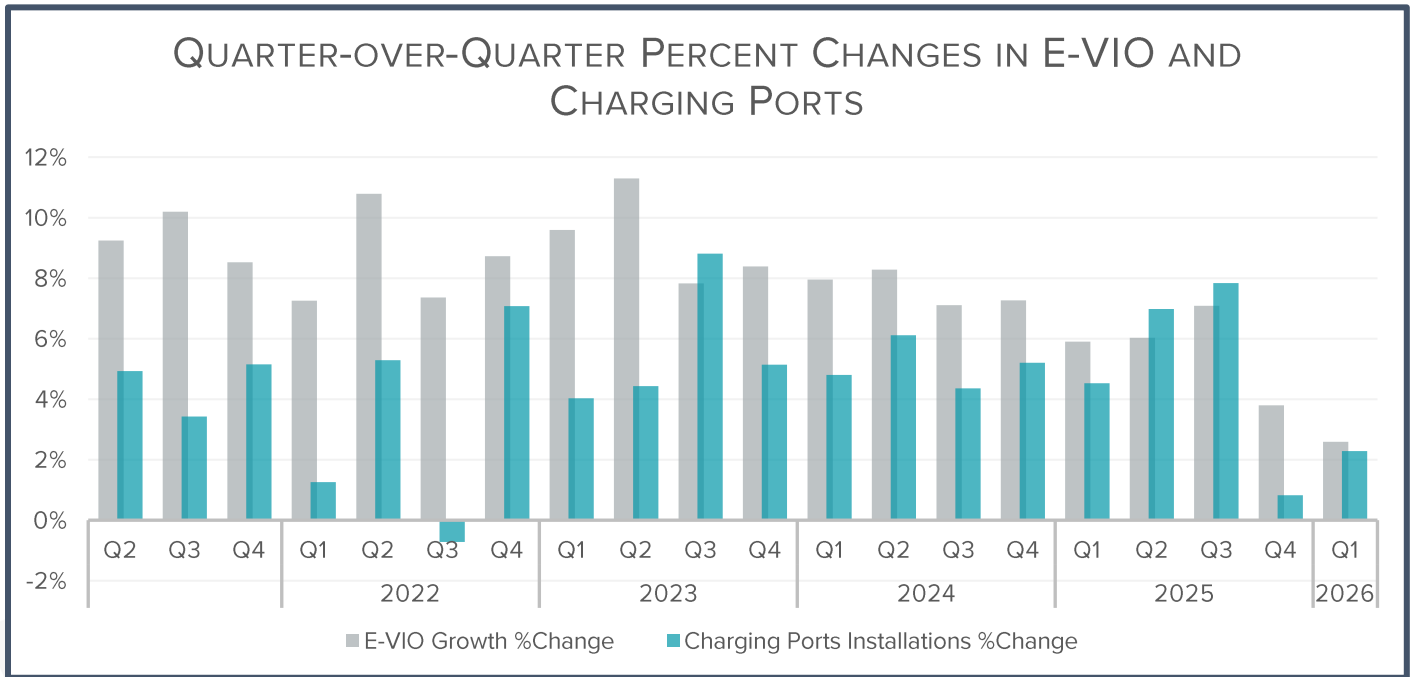
The composition of the charging network also continues to evolve. DC fast chargers accounted for 29 percent of all public charging ports in the first quarter of 2026, up from 22 percent in 2021. As the network expands, a growing share of public charging infrastructure is comprised of higher-powered DC fast charging equipment.



Quarter-over-quarter growth in public charging infrastructure and the EV fleet remained closely aligned during the first quarter of 2026. While E-VIO increased 2.6 percent during the quarter, public charging ports grew 2.3 percent.

Following several quarters in 2024 when charging deployment outpaced growth in the EV fleet, the pace of expansion has become more balanced. Since the beginning of 2025, quarterly growth rates for charging infrastructure and E-VIO have generally tracked one another, helping maintain a relatively stable ratio of EVs per public charging port.

Although the EV fleet continues to grow slightly faster than public charging infrastructure, the gap remains modest, underscoring the continued expansion of the nation's charging network alongside vehicle adoption.



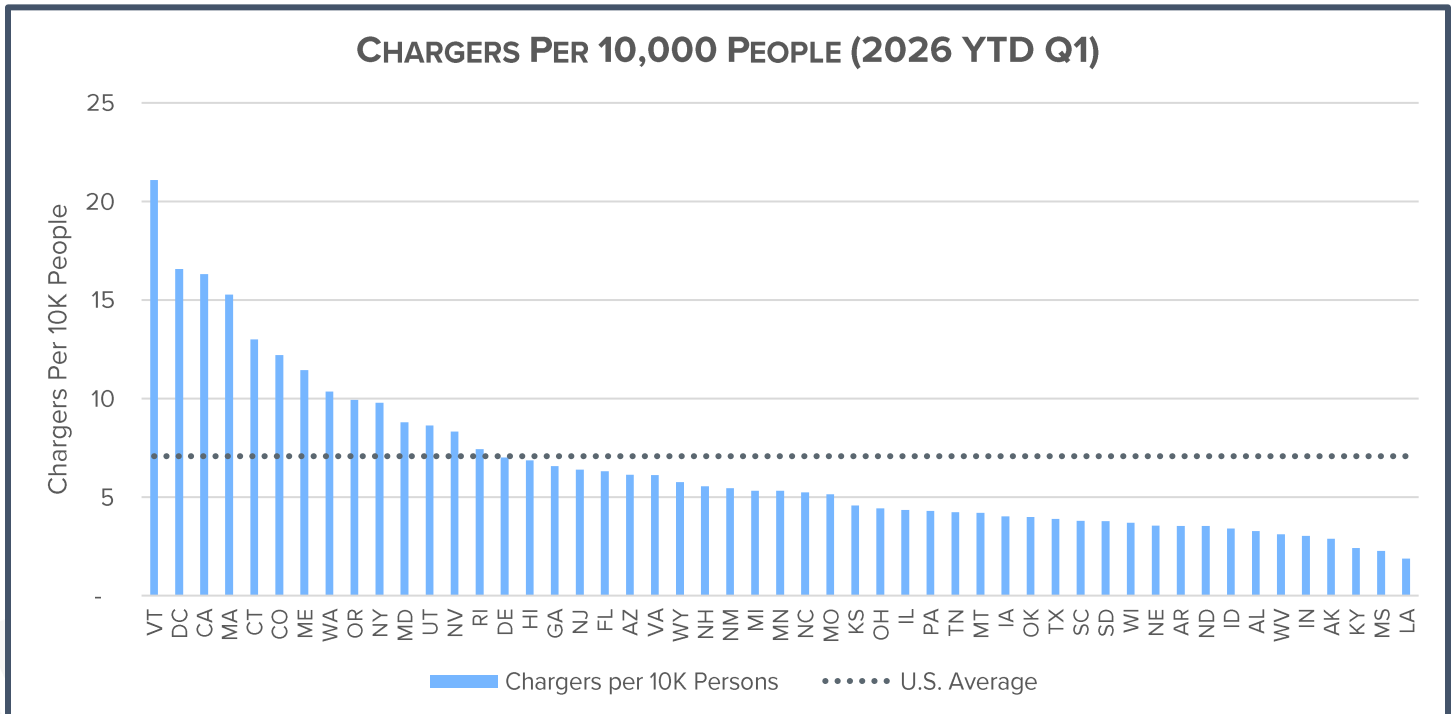
U.S. PUBLIC CHARGING: CHARGERS PER CAPITA

While the total number of public charging ports provides one measure of infrastructure deployment, per-capita comparisons offer additional context by accounting for differences in state population. States with the largest number of chargers do not necessarily have the highest concentration of charging infrastructure relative to the number of residents.

California has by far the largest public charging network in the nation, but ranks lower when evaluated on a per-capita basis, with approximately 16 public charging ports per 10,000 residents. Nationally, the average was 7 charging ports per 10,000 people in the first quarter of 2026.

Vermont led the nation with approximately 21 charging ports per 10,000 residents, while several other states, including the District of Columbia, California, Massachusetts, and Connecticut, also exceeded the national average.⁸

⁸ Charging information from U.S. Department of Energy Alternative Fuels Data Center, stations in operation as of March 31, 2026



U.S. FAST CHARGING OUTLOOK: A MATURING AND DIVERSIFYING NETWORK

The U.S. fast-charging network continued to expand during the first quarter of 2026, with more than 3,300 new DC fast charging ports installed nationwide. Despite a softer EV sales environment following the expiration of federal purchase incentives, charging deployment remained strong, helping expand access to public charging infrastructure and support the growing EV fleet.

At the same time, the charging market continues to mature. Network utilization has remained relatively stable even as thousands of new charging ports have come online, suggesting demand is continuing to absorb new infrastructure as the network expands. Charging sites are also becoming larger and increasingly equipped with higher-powered charging equipment, improving charging capacity and convenience for drivers.⁹

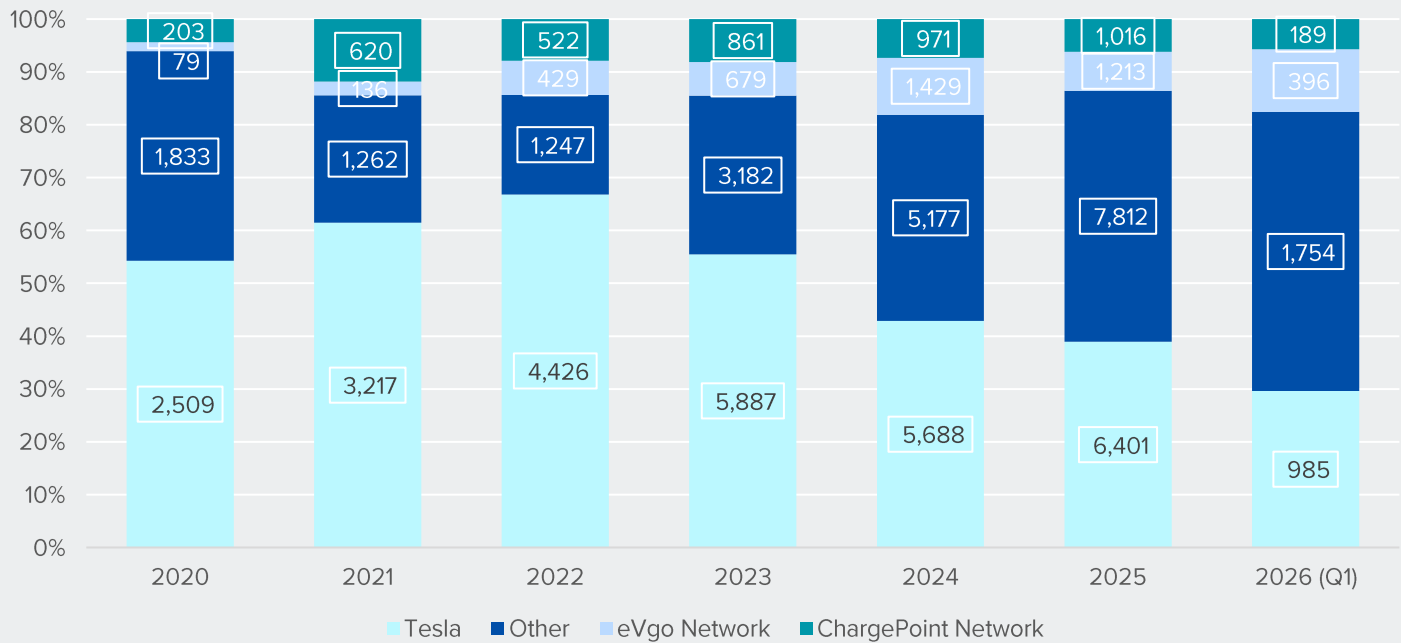
The composition of the charging network is evolving as well. While Tesla remains the nation's largest fast-charging provider, growth among other charging networks has accelerated significantly in recent years. Tesla accounted for more than half of all new DC fast charging installations between 2020 and 2023. By the first quarter of 2026, Tesla's share of new installations had fallen to 30 percent, while a broad mix of other charging providers accounted for more than half (53 percent) of all new deployments.

Rather than reflecting a slowdown in Tesla's investment, the shift illustrates the rapid expansion of the broader charging ecosystem. Accelerating deployment by EVgo, ChargePoint, and numerous regional and independent providers is helping create a more diverse and resilient charging network, expanding consumer access while reducing reliance on any single operator.

Tesla Share of New DC Fast Charging Installations Falls as Network Diversifies:

⁹ Paren, "US EV Fast Charging — Q1 2026," 4/23/2026

FAST CHARGING INSTALLATIONS: TESLA VS. NON-TESLA, 2020 - 2026 (YTD Q1)



Charging information from U.S. Department of Energy Alternative Fuels Data Center, as of March 31, 2026

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.

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](#).

VEHICLES IN OPERATION AND CHARGING INFRASTRUCTURE BY STATE

	EV Level 2	EV DC Fast	H2* Fueling	Total	Percent EVs of Total VIO**	Share of Registered EVs U.S.***	EVs Per Charger	EVs Per 10K Residents
AK	112	99		211	0.87%	0.07%	26	73.42
AL	805	869		1,674	0.62%	0.43%	19	63.48
AR	824	260		1,084	0.58%	0.23%	16	55.10
AZ	3164	1391		4,555	2.56%	2.41%	39	242.09
CA	45878	17660	50	63,588	7.34%	31.04%	36	594.77
CO	5615	1562		7,177	3.87%	2.91%	30	369.27
CT	3955	749		4,704	2.47%	1.03%	16	212.88
DC	1066	59		1,125	5.18%	0.23%	16	257.23
DE	422	301		723	2.40%	0.30%	31	216.53
FL	9590	4660		14,250	2.79%	7.48%	39	246.96
GA	5189	2055		7,244	1.94%	2.53%	26	171.52
HI	803	181	1	985	3.97%	0.61%	46	316.15
IA	718	570		1,288	0.74%	0.32%	19	75.51
ID	390	278		668	1.10%	0.31%	35	117.76
IL	2993	2455		5,448	2.10%	2.92%	40	173.87
IN	1170	908		2,078	1.04%	0.89%	32	96.60
KS	982	363		1,345	0.92%	0.37%	20	92.87
KY	686	410		1,096	0.72%	0.40%	27	66.34
LA	477	384		861	0.63%	0.32%	28	52.53
MA	8945	1747		10,692	3.12%	2.34%	16	249.60
MD	4014	1422		5,436	3.07%	2.21%	30	267.03
ME	1229	369		1,598	1.67%	0.31%	14	163.26
MI	3794	1553		5,347	1.62%	1.88%	26	140.01
MN	2084	968		3,052	1.60%	1.14%	28	148.56
MO	2399	791		3,190	1.03%	0.81%	19	97.04
MS	347	320		667	0.34%	0.14%	16	36.23
MT	224	251		475	0.61%	0.16%	25	105.02
NC	3924	1758		5,682	1.62%	2.16%	28	148.82
ND	130	147		277	0.36%	0.04%	11	38.00
NE	472	230		702	0.82%	0.24%	25	89.22
NH	456	322		778	1.75%	0.32%	30	168.31
NJ	3893	2038		5,931	3.45%	3.54%	45	284.40
NM	600	551		1,151	1.18%	0.33%	21	116.77
NV	1499	1158		2,657	4.03%	1.39%	39	324.84
NY	16092	3074		19,166	2.89%	4.39%	17	167.34
OH	3740	1468		5,208	1.22%	1.78%	25	112.50
OK	644	970		1,614	1.30%	0.82%	38	150.47
OR	2953	1250		4,203	3.54%	1.86%	33	328.55
PA	3754	1819		5,573	1.59%	2.37%	32	136.25
RI	691	123		814	1.82%	0.15%	14	102.70
SC	1156	885		2,041	0.90%	0.67%	25	93.21
SD	185	162		347	0.55%	0.07%	16	59.33
TN	2037	976		3,013	1.07%	1.02%	25	106.83
TX	7160	4722	1	11,883	1.87%	6.43%	40	157.42
UT	2162	790		2,952	2.77%	1.19%	30	259.14
VA	3664	1664		5,328	2.12%	2.23%	31	191.07
VT	1083	282		1,365	3.50%	0.26%	14	300.31
WA	6066	2019		8,085	4.25%	4.01%	37	383.11
WI	1376	811		2,187	1.09%	0.80%	27	101.48
WV	337	215		552	0.49%	0.10%	14	43.09
WY	161	175		336	0.47%	0.04%	10	54.79
U.S.	172,110	70,244	52	242,406	2.54%	100.00%	31	222.92

*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 March 31, 2026; Charging information from U.S. Department of Energy Alternative Fuels Data Center, as of March 31, 2026

REGISTRATIONS

EV registrations as a share of all registered light-duty vehicles are 2.54 percent (as of March 31, 2026). There are more than 293 million registered light-duty vehicles in the U.S.

At the end of Q1 2026, California accounted for 31 percent of all registered light-duty EVs in the U.S.

States with highest portion of total EVs registered:

1. CA (2,317,520, 7.34%)
2. DC (17,465, 5.18%)
3. WA (299,323, 4.25%)
4. NV (103,760, 4.03%)
5. HI (45,372, 3.97%)
6. CO (217,042, 3.87%)
7. OR (139,086, 3.54%)
8. VT (19,444, 3.5%)
9. NJ (264,233, 3.45%)
10. MA (174,756, 3.12%)

States with highest ratio of registered EVs per public charger:

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

Read more about automakers plans for
[ELECTRIC VEHICLES HERE](#)

SPOTLIGHT: FROM BUILDING MORE INFRASTRUCTURE TO USING IT SMARTER

LEVERAGING OPTIMIZED CHARGING TO ADVANCE AFFORDABILITY GOALS

As the U.S. EV fleet grows beyond 7.5 million vehicles, attention is increasingly shifting from simply adding charging infrastructure to optimizing when and how vehicles charge. Vehicle-grid integration (VGI) encompasses a range of strategies designed to align EV charging with grid needs, including optimized charging programs, time-of-use rates, and emerging bidirectional charging technologies.

At its core, VGI is about affordability. Electric vehicles remain parked approximately 97 percent of the time, creating significant flexibility in when charging occurs. By encouraging charging during periods of lower electricity demand or greater renewable energy availability, optimized charging can help reduce costs for EV drivers while improving utilization of existing grid infrastructure.¹⁰

Recent studies suggest the potential benefits are substantial. Research from The Brattle Group and ev.energy found that optimized charging could avoid up to \$575 in costs annually per EV¹¹, while separate analysis from The Brattle Group and EnergyHub estimated annual benefits of \$245 to \$400 per vehicle and the potential to delay certain distribution system upgrades by up to a decade.¹² Argonne National Laboratory and the Smart Electric Power Alliance similarly estimated approximately \$300 per EV per year in downstream distribution benefits resulting from deferred transformer and feeder upgrades.¹³

Utilities across the country are beginning to demonstrate these benefits in real-world programs. Pacific Gas & Electric's optimized charging pilot reduced peak demand on constrained grid assets while lowering customer electricity costs¹⁴, and Baltimore Gas & Electric's Smart Charge Management Program reduced coincident peak demand by more than 70 percent.¹⁵ AES Indiana found that optimized charging strategies could defer a significant share of planned distribution upgrades, representing approximately \$75 million in annual deferred infrastructure investments.¹⁶

As the EV market matures, optimizing charging behavior is becoming increasingly important. Utilities, regulators, automakers, and charging providers are progressively exploring VGI as a tool to support electricity affordability, improve grid reliability, and accommodate growing EV adoption without requiring unnecessary infrastructure investments. Optimized charging may help deliver value to EV drivers, and the broader electric grid.

VGI IN ACTION: CONSUMERS ENERGY (MICHIGAN)

Consumers Energy's managed charging program has demonstrated how optimized charging can benefit both EV drivers and the electric grid. Through a combination of incentives and managed charging strategies, more than 90 percent of participating EV charging occurs during off-peak hours. According to the utility, increased EV adoption combined with managed charging could place approximately \$755 million of downward pressure on electric rates through 2031 by improving utilization of existing grid infrastructure and spreading fixed costs across more electricity sales. ([Electrification Coalition](#))

¹⁰ Electrification Coalition, "[Driving Affordability: EVs Grid-Stabilizing Impacts](#)," 1/15/2026, 8/21/2025

¹¹ EV.energy, Press Release, "[Smarter EV charging could slash utility bills by 10% for every U.S. household - new report](#)," 8/21/2025

¹² The Brattle Group, Report, "[Demonstrating the Full Value of Managed Electric Vehicle Charging](#)," January 2026

¹³ Smart Electric Power Alliance, "[Exelon's Managed Charging Program](#)," 8/2023

¹⁴ Pacific Gas & Electric, Advice 7822-E: PG&E's 2026 Low Carbon Fuel Standard Implementation Plan, 1/2026

¹⁵ PLMA, [2025 PLMA Award Winner: Baltimore Gas and Electric & WeaveGrid](#), 5/7/2025

¹⁶ AES & Camus, [Getting Ahead Of The EV Tipping Point](#), 10/2024

THE POWER OF VEHICLE-GRID INTEGRATION (VGI)

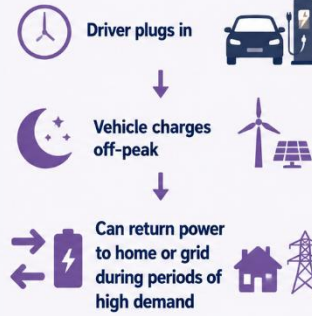
UNMANAGED CHARGING



OPTIMIZED CHARGING (VGI)



BIDIRECTIONAL CHARGING (Future)



VGI aligns EV charging with grid needs — lowering costs, improving reliability, and building a more efficient energy future.