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Exec. Summary

Ohm Analytics Q2 2025 US EV Charging Market Report

Market intelligence for the distributed energy transition.

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Data Partners

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From the Ohm Analytics team, thank you to our customers and partners that help us to make this report a valuable resource for the industry. We view our work as a collaboration between EV charging leaders committed to accelerating the adoption of clean transportation solutions.

To become a data partner for our next report, contact larsen@ohmanalytics.com.

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Research and analytics firm founded in 2018 covering the distributed energy transition

- EV Charging
- Solar
- Energy Storage
- VPP & Grid Insights

Used by 600+ companies across OEMs, distributors, software, installers, developers, and utilities

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Executive Summary: Key Themes

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EV Charging Market is Growing, but at a Slower Pace

17% YoY increase in DCFC ports installed in Q2 2025, while L2 port installations remained flat YoY in Q2 2025.

Effect of Incentives on Established vs. Emerging Markets

States with historically lower EVSE penetration, like PA and IL, are seeing growth while established markets, like CA and MA, saw YoY contraction in Q2 2025.

High Powered DCFC Growing Faster

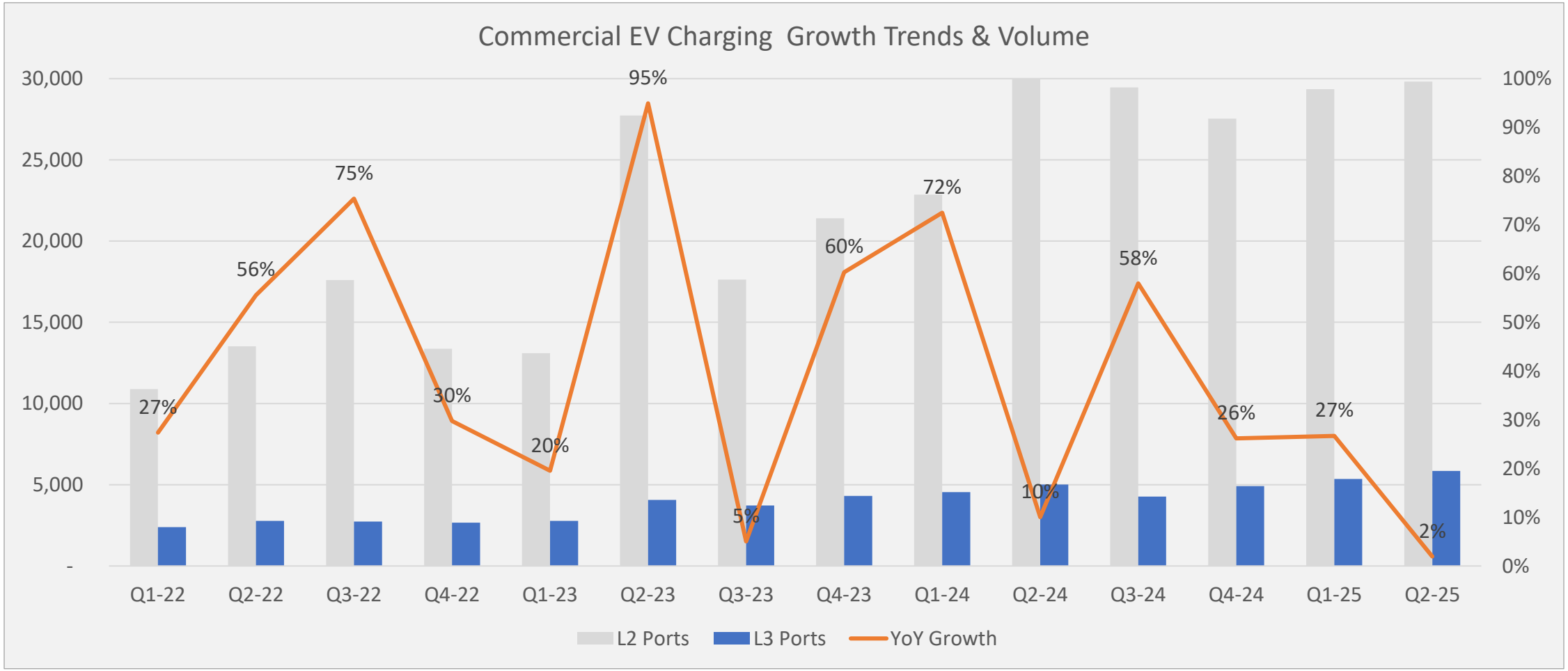
Installations of DCFC rated at 300 kW+ increased 421% YoY in Q2 2025 while DCFC rated 120-180 kW grew 54% YoY.

MHD Fleet Charging Hubs on the West and East Coasts

330 new DCFC ports for shared MHD fleet charging opened to date in 2025 and 546 DCFC ports are planned through 2026.

Positive but Slower Growth

With a **17% YoY increase in DCFC ports** installed **and L2 port installations remaining flat** YoY in Q2 2025, the EV charging market is continuing to make headway. While growth rates are not as high as previous quarters, total port installations are still near record quarterly levels. For public charging, the **reinstatement of the NEVI program** will only further support DCFC. Behind the fence, **fleet** and **multi family** charging projects continue to drive the L2 markets, accounting for **72% of L2 ports installed** in Q2 2025.



Incentives in Established vs. Emerging Markets

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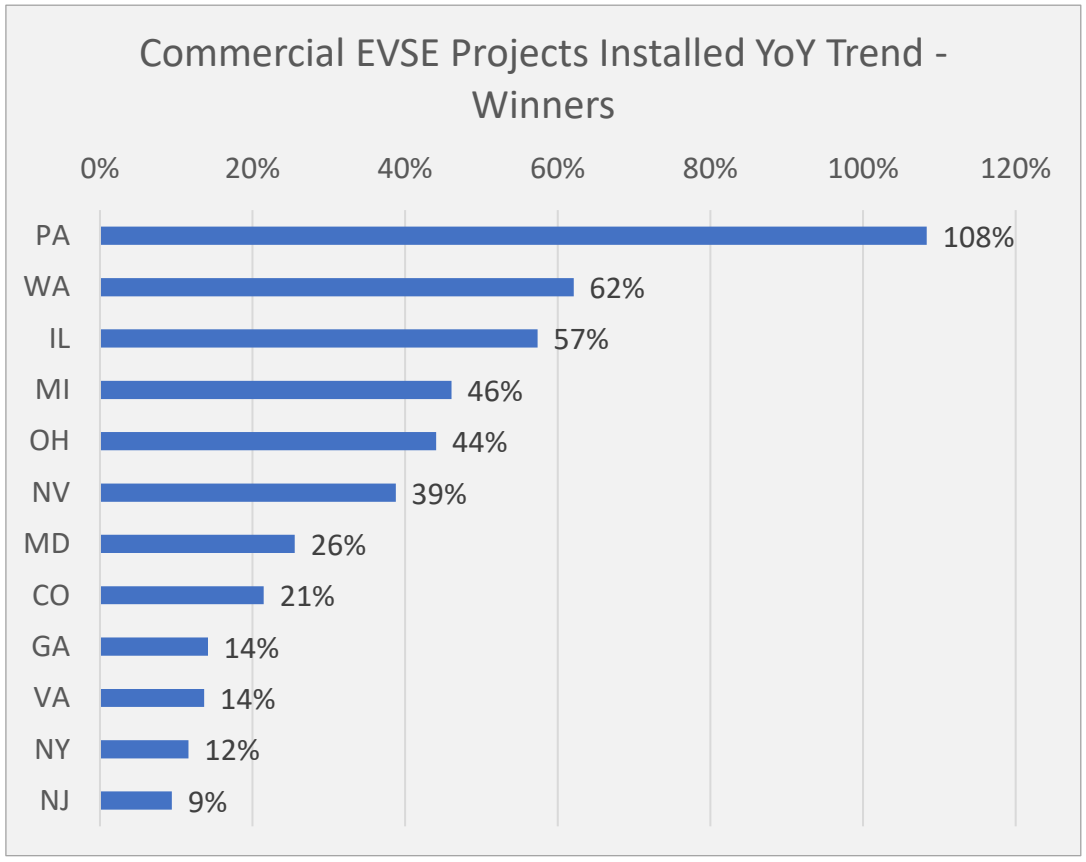
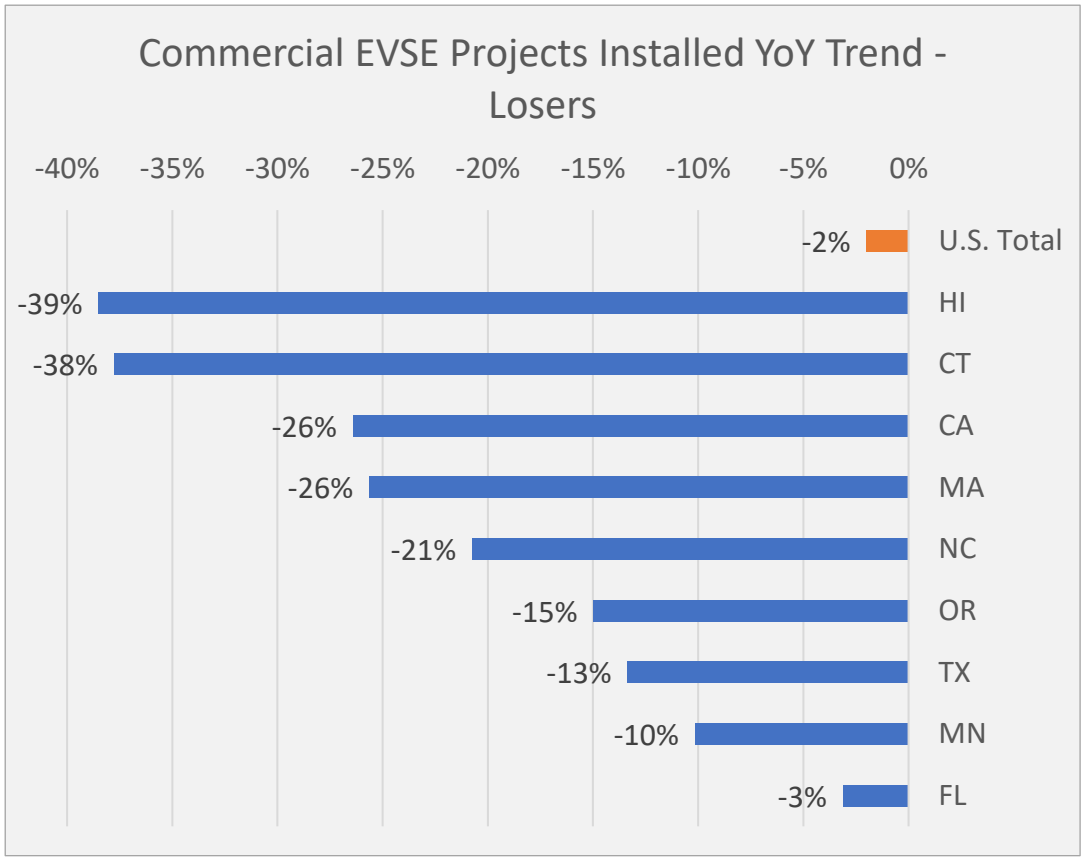
The decrease in project activity in states with historically high rates of EV charging adoption, such as CA and MA, can partially be attributed to **incentive fatigue** according to our network. Applications require intense coordination between utilities, AHJs, installers, and network/hardware partners which increases project timelines. To decrease deployment timelines, CA is now requiring approved electrical permits and utility interconnection agreements for its reintroduced L2 and DCFC rebate programs. **Only approving "shovel ready" projects will favor providers with access to capital and proven experience.** However, in states with historically lower EV charging penetration, like PA and IL, incentive programs continue to accelerate market growth. We are seeing national developers expand into less mature markets to take advantage of these programs.





High Powered Hardware Growing Faster

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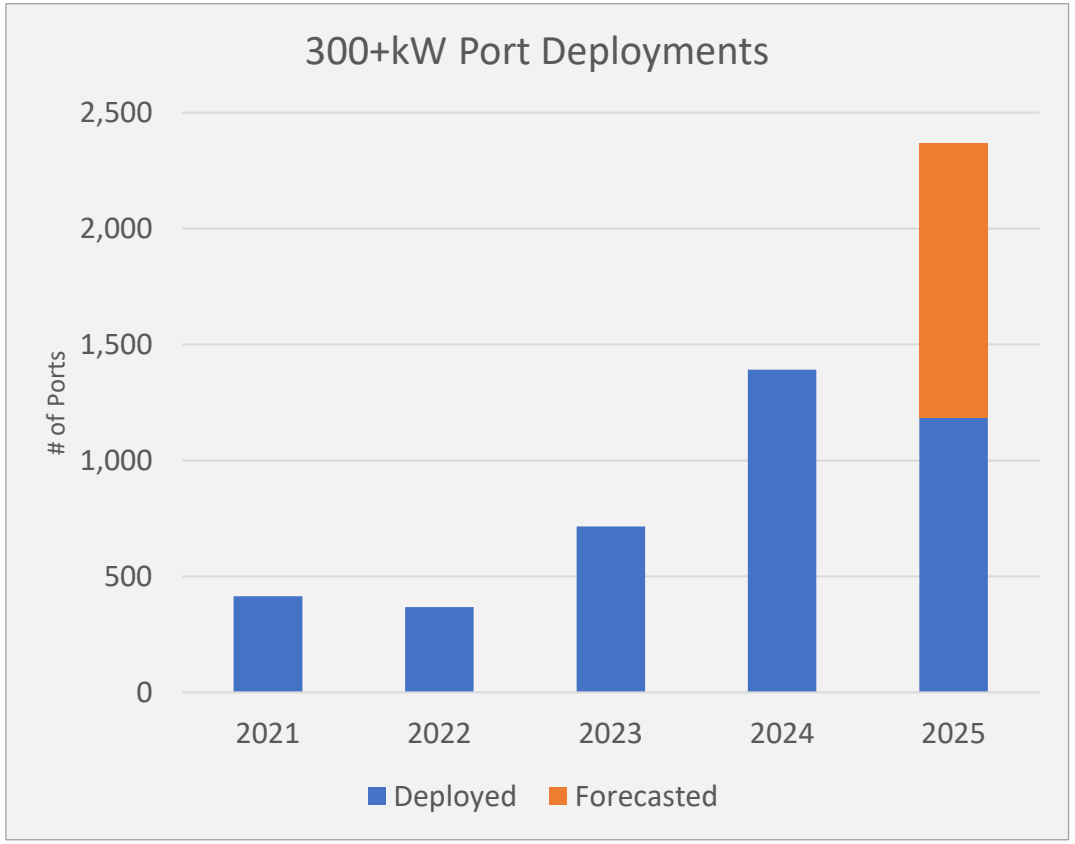
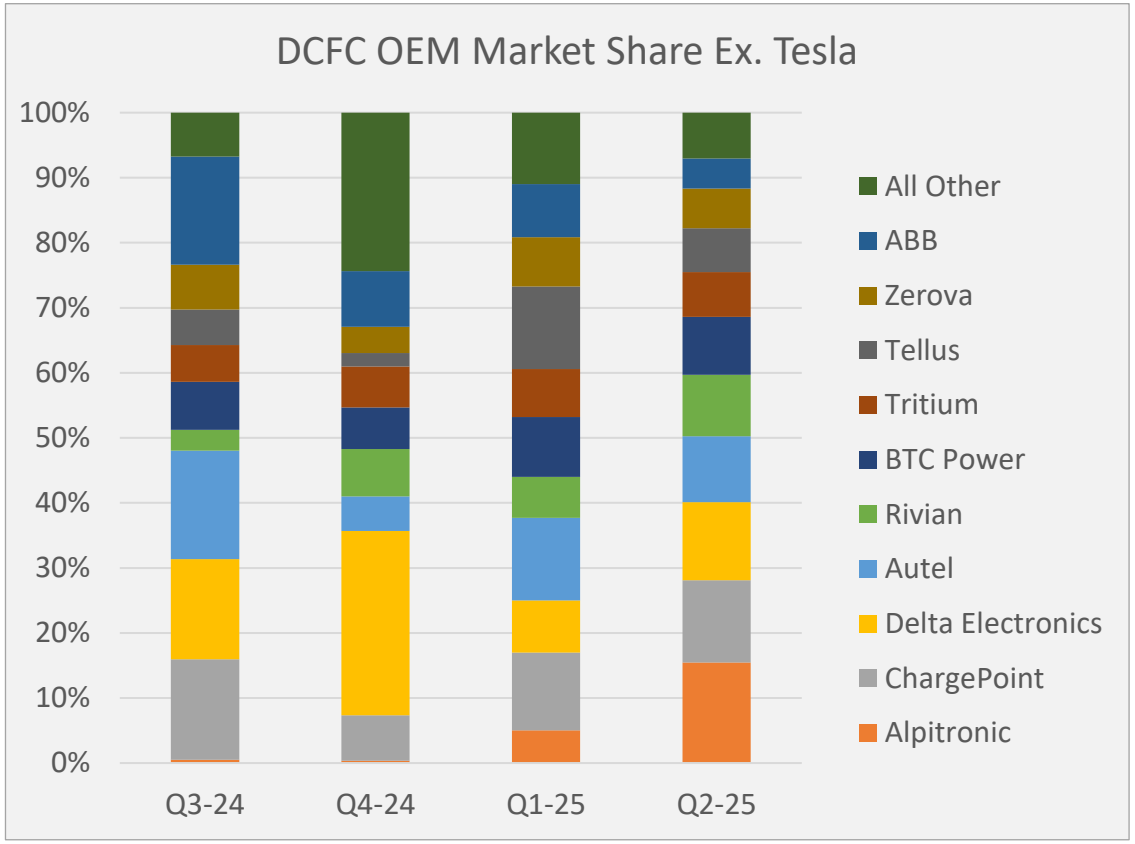
Higher powered DCFC infrastructure is growing faster than lower-powered solutions for public charging. Installations of DCFC rated at **300 kW+ increased 421% YoY** in Q2 2025 while DCFC rated 120-180 kW grew 54% YoY. Rapid adoption of 400 kW **Alpitronic** hardware by numerous CPOs and increasing sales of high-powered models from **BTC Power** and **Delta Electronics** correspond with customer demand for faster charging. DCFC and on-site BESS are also growing in popularity as **XCharge, Autel,** and **Electric Era** are expanding. Higher costs of EVSE, especially for high output models, only increase the value proposition of underwritten warranty providers like **EVSTAR**.

EVSTAR





Source: Ohm Analytics Direct Project-Level Data Research Collection. Left-hand chart does not reflect Tesla, ChargePoint, Flo, or Rivian.

MHD Fleet Charging Hubs on Both Coasts

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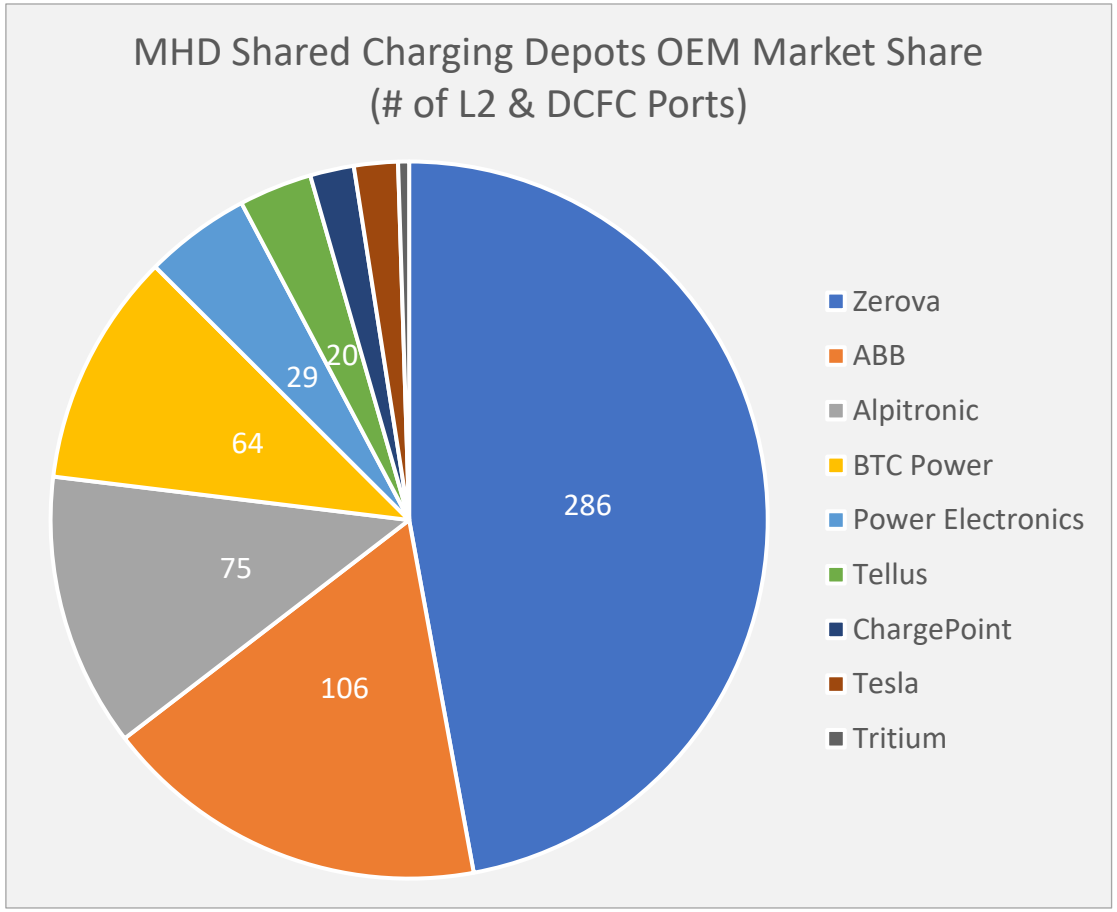
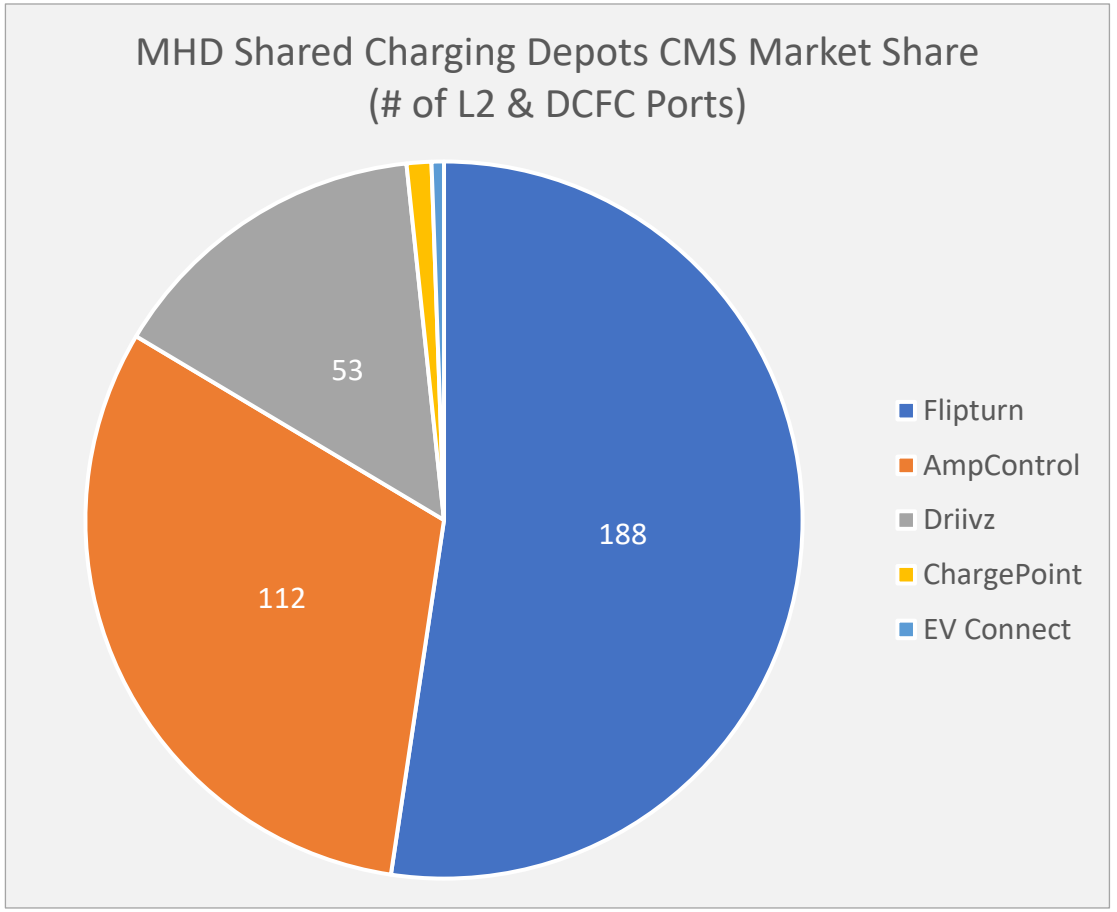
Shared medium- and heavy-duty public charging hubs are proliferating across the country with **330 DCFC ports installed in 2025**, including **Greenlane's** first site in Colton, CA in April and **EV Edison's** first site in Newark, NJ. There are also **546 DCFC ports planned** to come online through the end of 2026. On the East Coast, the **Clean Corridor Coalition (C3)** comprised of NJ, CT, DE, and MD, is beginning to plan buildout of sites along the I-95 corridor. Of planned and open sites, **Zerova** and **Flipturn** lead the market for hardware and software solutions, respectively.





Source: Ohm Analytics Direct Project-Level Data Research Collection. May exclude select players.

Commercial L2 Developers

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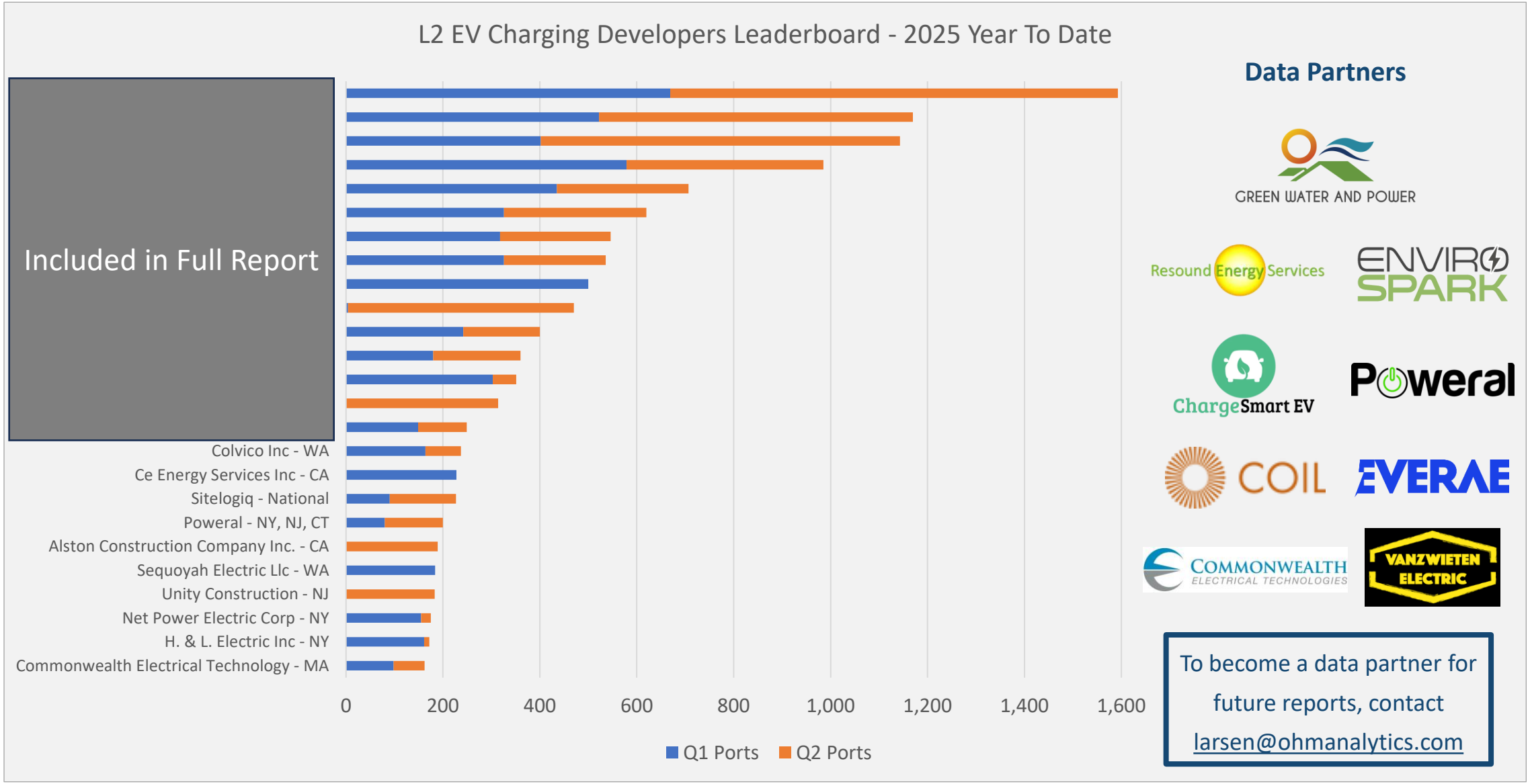

Source: Ohm Analytics Direct Project-Level Data Research Collection.

Full Report Includes

Market and Policy Landscape

- EV Charging Policy Updates
- State Funding Program Updates

Commercial Market Overview

- Growth Trends
- Commercial Growth By Segment and State
- Notable Projects
- DCFC Power Trends
- DCFC Pricing Trends

Multi Family Market

- Top Metro Areas
- OEM and CMS Market Share

Fleet Market

- Site Host Trends
- Top Metro Areas
- OEM and CMS Market Share

Developer/Contractor Leaderboards

- Top L2 and DCFC Project Developers
- Self Reported Totals

Public Charging Market

- L2 Charging Market Shares (OEMs + Networks)
- DCFC Market Shares (OEMs + Networks)

Residential Market

- Growth Trends
- Case Study: German EV Sales
- OEM Market Share