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Exec. Summary

Ohm Analytics Q3 2025 US EV Charging Market Report

Market intelligence for the distributed energy transition.

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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.

Ohm Analytics

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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Record Quarter for DCFC, AC Charging Continues on a Stable Pace

38% YoY increase in DCFC ports installed in Q3 2025, while L2 port installations grew 8% YoY in Q3 2025.

Next Generation of CPOs Emerging in all Corners of the US

New players are challenging legacy CPOs in several major markets and placing a heavy focus on reliability to win brand loyalty.

Utility and State Programs Boost the US EV Charging Industry for 2026

There are 24 state programs to date in 2025 totaling over $1B in available charging infrastructure funding. Impactful MHD fleet programs are expected to launch in 2026.

Record EV Sales in Q3, Slow Q4, Commercial Charging Resilient in 2026

EV sales reached 10.5% of new vehicle sales in Q3 2025 before the end of the EV tax credit but dropped 49% MoM in October. EV sales are expected to remain lower in 2026, but our network believes commercial charging in 2026 will be resilient.

Record Quarter for DC, AC Stability

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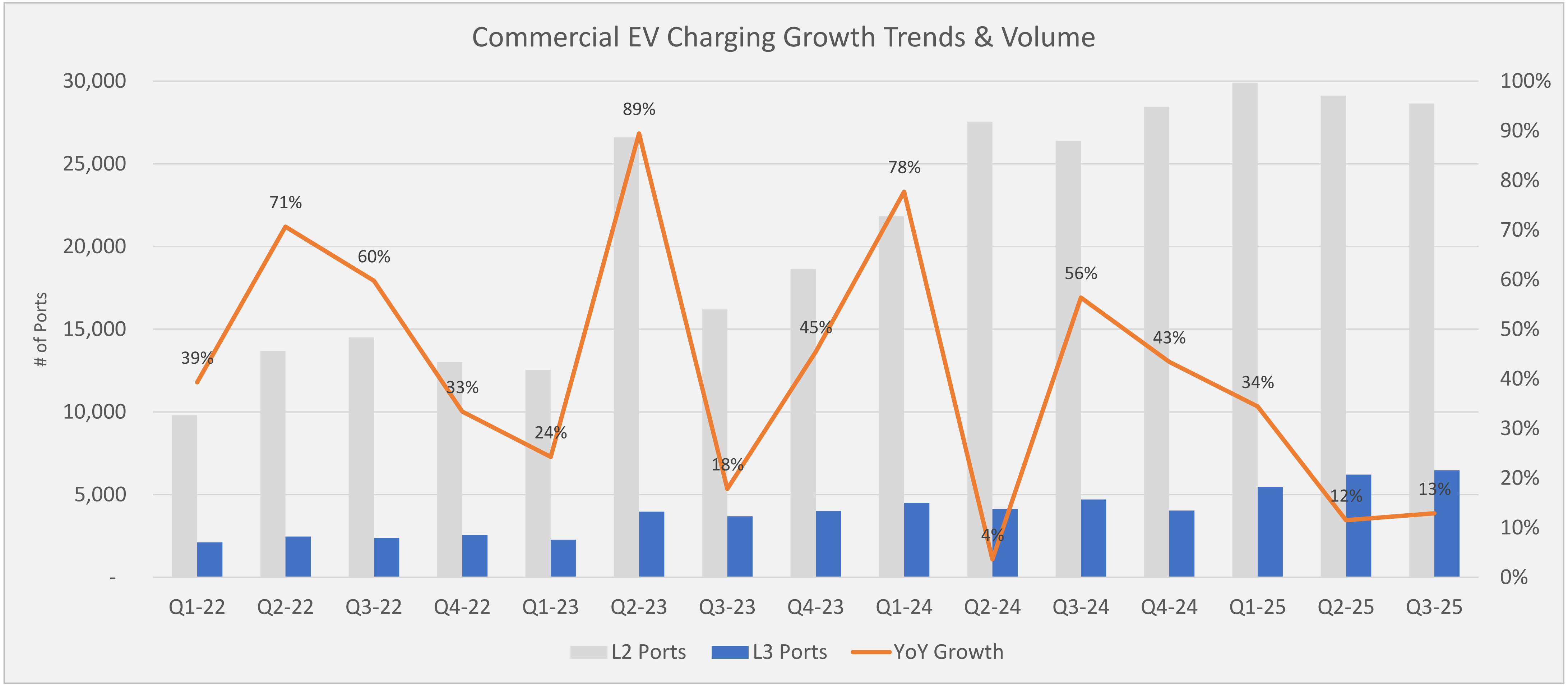
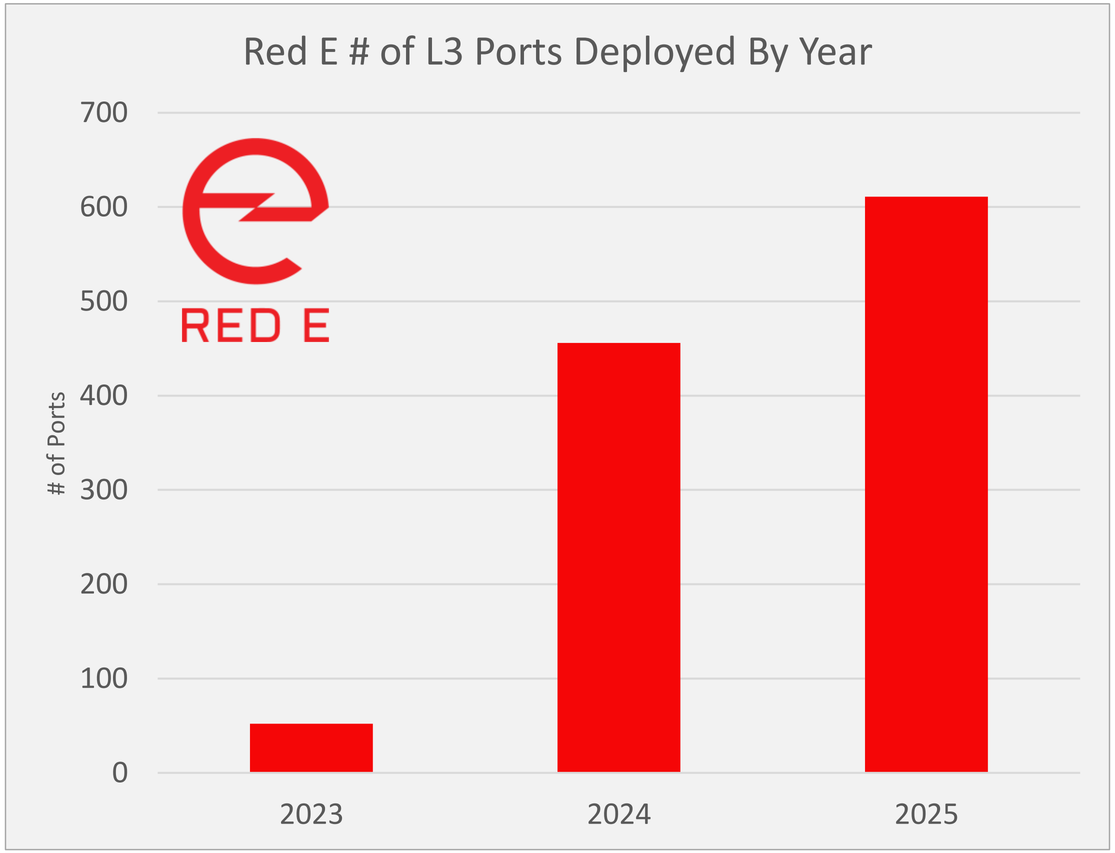
With a **38% YoY increase in DCFC ports** installed and **8% YoY increase in L2 ports** installed in Q3 2025, the EV charging market is continuing to make headway. While growth rates are not as high as previous quarters, total port installations are still near record quarterly levels. For public charging, 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 Q3 2025.



Next Generation of DC CPOs Emerge

In 2023 **Red E** had 51 ports in the ground in Michigan. Today, they've deployed **1,133 L3 ports across 43 states**, providing EV drivers an alternative to legacy fast charging operators. Ohm is tracking **38 similar DCFC CPOs that have less than 100 ports today**, many of which have opened or announced their first sites this year, such as **Suncoast Charging**, **Rangeway**, and **Mynt Systems**. These CPOs represent a new generation of the industry that is focused on **profitability** and **reliability.** This is an opportunity for CMS providers, charger OEMs, installers, and distributors to help these CPOs grow into the next Red E in 2026 and beyond.

Featured Emerging CPOs



State Programs with Over $1B in Funding in 2025

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24 state EV infrastructure programs opened in 2025, totaling over **$1 billion funding** available. 2026 will bring the launch of new funding programs for MHD fleets, like **$50 million for the Take Charge program in NJ** and **WAZIP in WA**, and continuation of existing programs, including an additional **$46 million for MassEVIP**. Expansion of utility programs is expected to continue with the launch of a **new make ready program from APS** and a **$31.3 million EVSE rebate** program from **Pacific Power** in **OR** focusing on fleet and public charging.

2025

Communities in Charge CA
$56.50 million
L2 infrastructure

Washington Zero-Emission Vehicle Infrastructure Partnership (ZEVIP)
$22.5 million
DCFC corridor infrastructure

Driving a Cleaner Illinois
$20 million
L2 and DCFC public infrastructure

2026

Take Charge New Jersey
$50 million
L2 and DCFC fleet infrastructure

Washington Zero-Emission Incentive Program (WAZIP)
$110 million
POS MHD Vehicle Rebates

Pacific Power
L2 and DCFC EVSE rebates for fleet and public charging

APS
L2 and DCFC make ready program for public, workplace, government, non-profit

EV Sales Dip in Oct, '26 Commercial Charging Resilient

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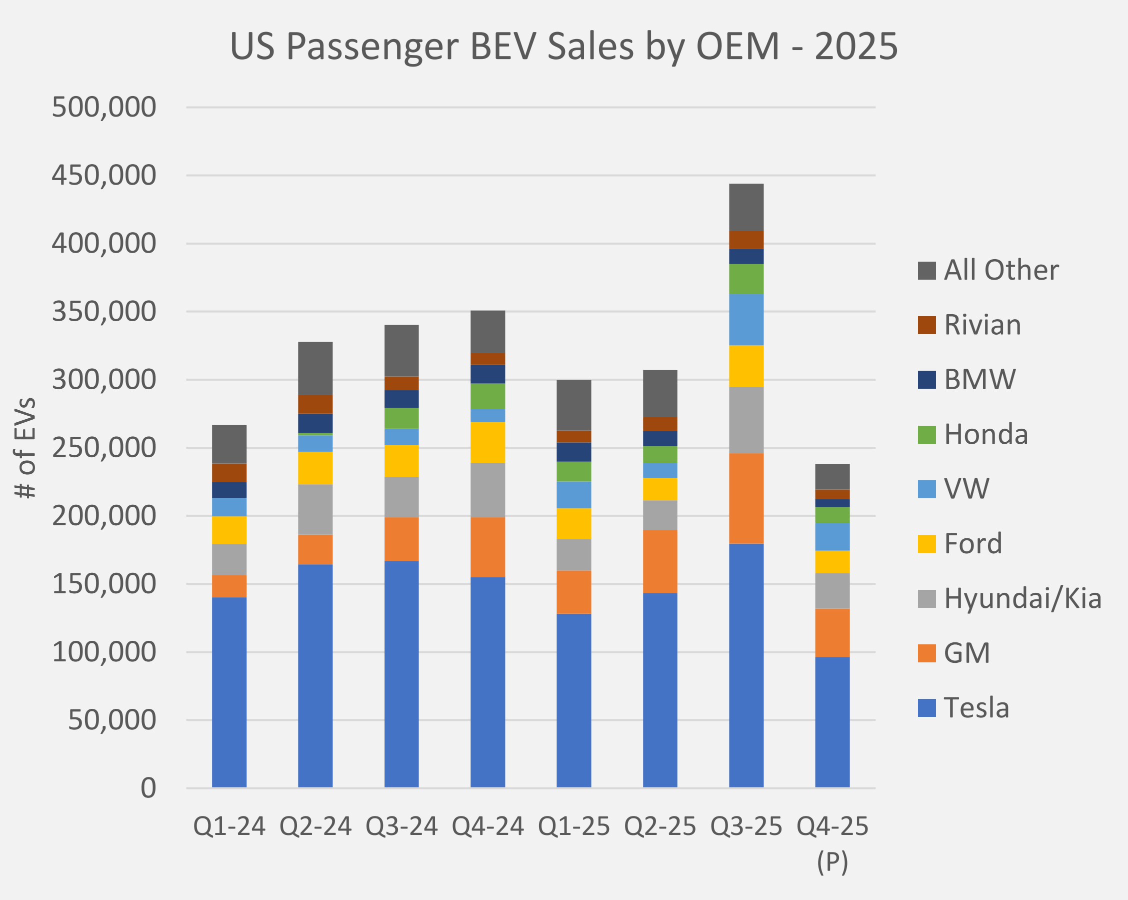
US EV sales **dropped 30% YoY** and **49% MoM** in October due to the **sunset of the federal EV tax credit** and inflated Q3 sales numbers from the pre-sunset EV purchase rush. Commercial charging activity was **+13% YoY in Q3** in terms of total # of ports deployed. Feedback from our network of charging OEMs, operators, and CMS providers on the 2026 commercial charging landscape is optimistic, reflecting the trends we are seeing in 2025 charging deployment numbers.



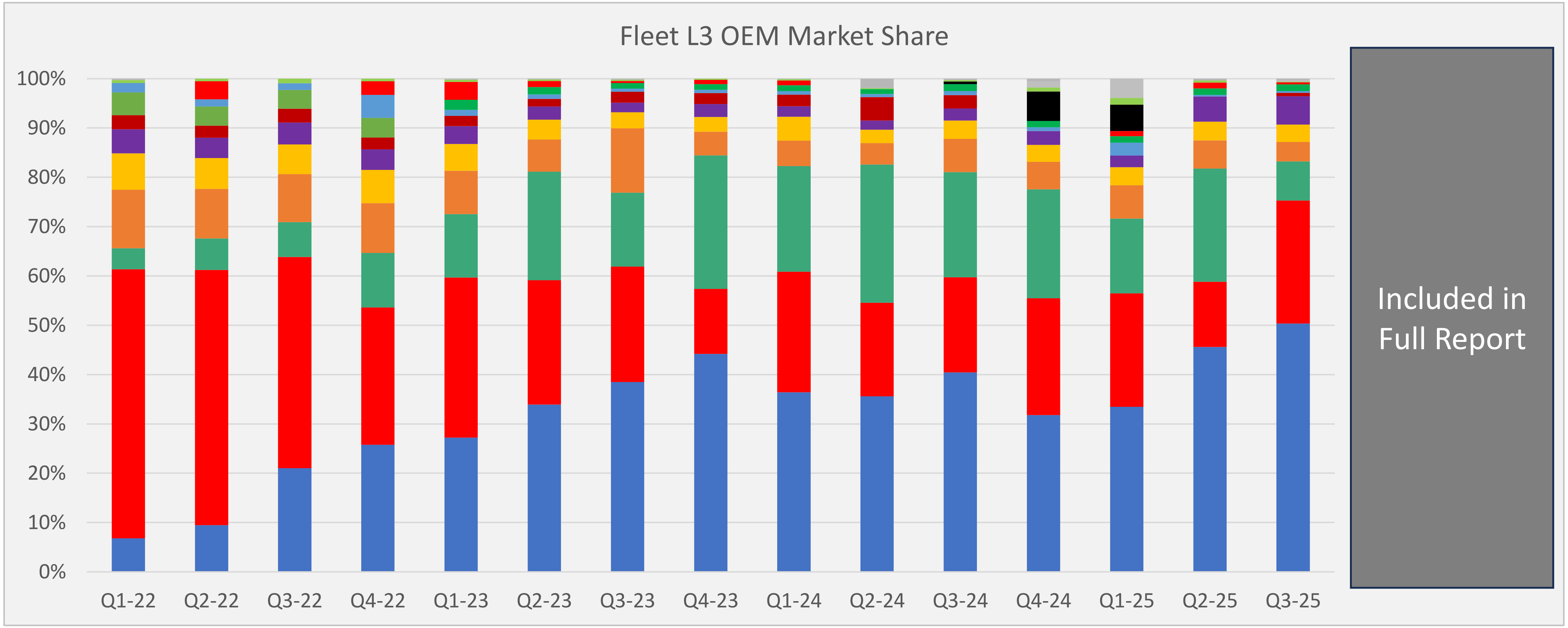
Resiliency Factors for 2026 Commercial Charging

1. **Fleets:** Existing sustainability pledges from large corporations will maintain momentum on last-mile delivery
2. **Public DCFC:** Rise of new regional DC CPOs and expansion of national players like Walmart Energy, IONNA, and Mercedes-Benz
3. **Multi Family:** Tenant demand from current EV owners and relatively low penetration of multi family charging
4. **State and Utility Programs:** Already-allocated funding from utilities and state programs will incentivize infrastructure deployment
5. **Network Sentiment:** The Ohm network is optimistic about charging deployment in 2026 given incentive program availability and commitment from large customers

Source: Cox Automotive. Q4-25 totals are preliminary and based on October '25 data.

Fleet L3 OEM Market Share

- **Infypower** leads fleet charging infrastructure deployments with over 3,000 ports deployed for dealership fleets and private depots, including **PepsiCo** and **Quality Custom Distribution**
- **Zerova** has become a leader in partnering with shared depot charging operators including **Voltera**, **WattEV**, and **Forum Mobility**, and powering **Stellantis's Free2Move** dealership fleets



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

Commercial L2 Developers

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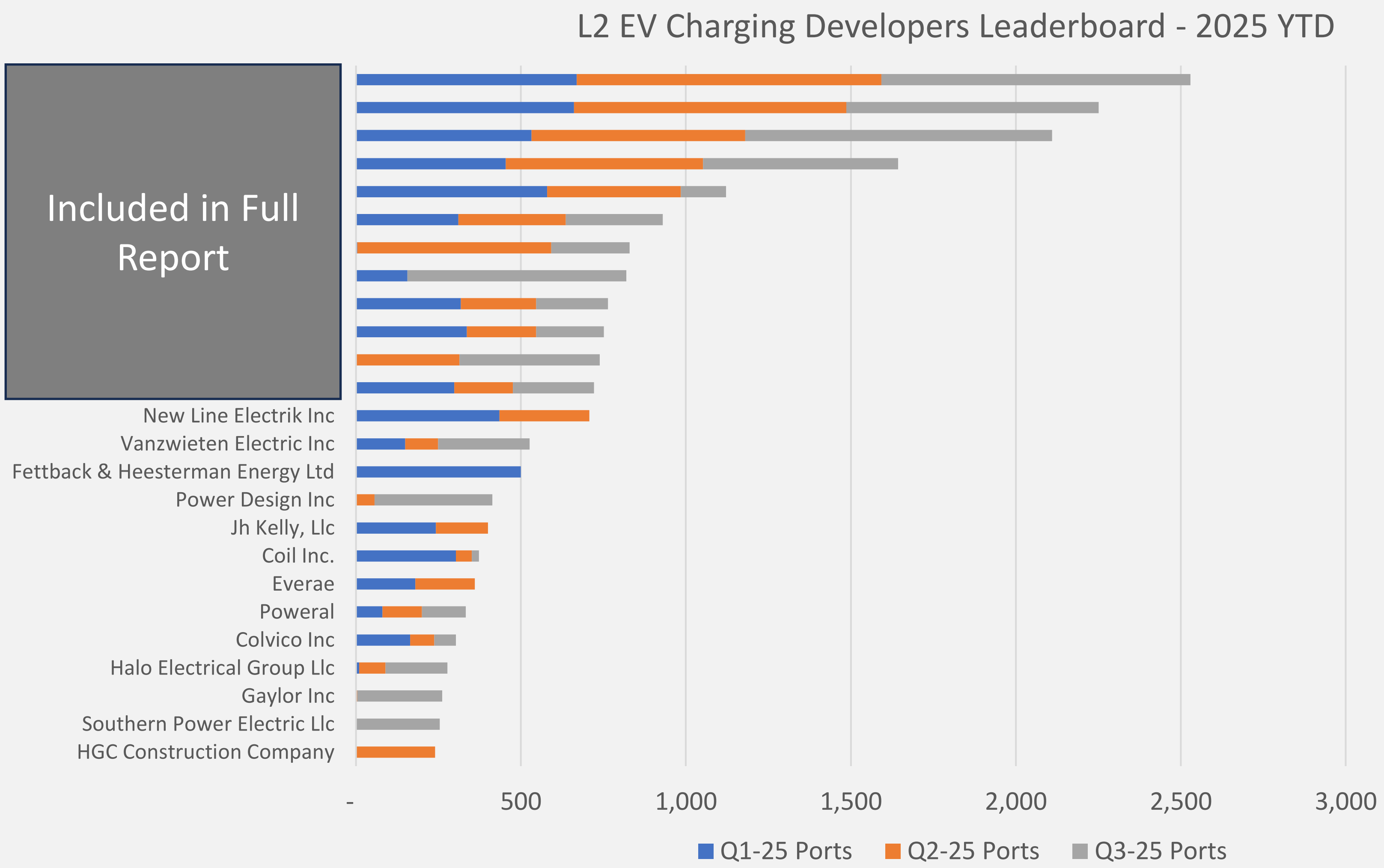
- **Green Water and Power** and **Resound Energy** both install over 900 L2 ports in Q3 2025
- **Willow Glen Electric** merges with **Trout Electric USA** to hit the #4 spot in the nation and #3 in California



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Source: Ohm Analytics Direct Project-Level Data Research Collection. [2]

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Full Report Includes

Executive Summary

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

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)
- Emerging CPOs Analysis
- Site Host Analysis

Residential Market

- Manage Charging Programs
- Growth Trends
- Residential Installer Leaderboard
- L2 Charger OEM Market Share