



# Ohm Analytics Q4 2025 US EV Charging Market Report

Market intelligence for the distributed energy transition.

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# Data Partners

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 who are committed to accelerating the adoption of clean transportation solutions.

## CMS Providers



## Charger OEMs



## Installers & CPOs



# 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

## Clients

The clients listed are: BTC POWER, TESLA, AUTEL, SAMSUNG SAMSUNG C&T CHARGING SOLUTIONS, CBRE, ENPHASE, wallbox, ZEROVA, Schneider Electric, XCHARGE, SIEMENS, INFY POWER, powerflex, i-charging USA, LINCOLN ELECTRIC, Ec Epic Charging, wevo by SolarEdge, ORANGE, ENSOL EV, GREEN WATER AND POWER, evergeed, REXEL, sonepar, CHARGE LAB, Voltra, relion, and MONTERRA.

# Executive Summary: Key Themes



## Record Year for AC & DC Charging, Measured Outlook for 2026

Over 23,000 DC ports were installed in 2025, a 46% YoY increase, and over 113,000 AC ports were installed in 2025, a 10% YoY increase.



## MCS is Here and Will Make Advances in 2026

Tesla has already opened 2 sites with megawatt charging capability and announced over 65 more. Kempower, Zerova, Alpitronic, ABB, and i-charging have also announced MCS deployments or products for 2026.



## Integration of BESS for DC Charging

Only 2% of all DC EV charging sites incorporate BESS today, but providers are increasingly looking to DERs to improve project economics, site resiliency, and time to market.



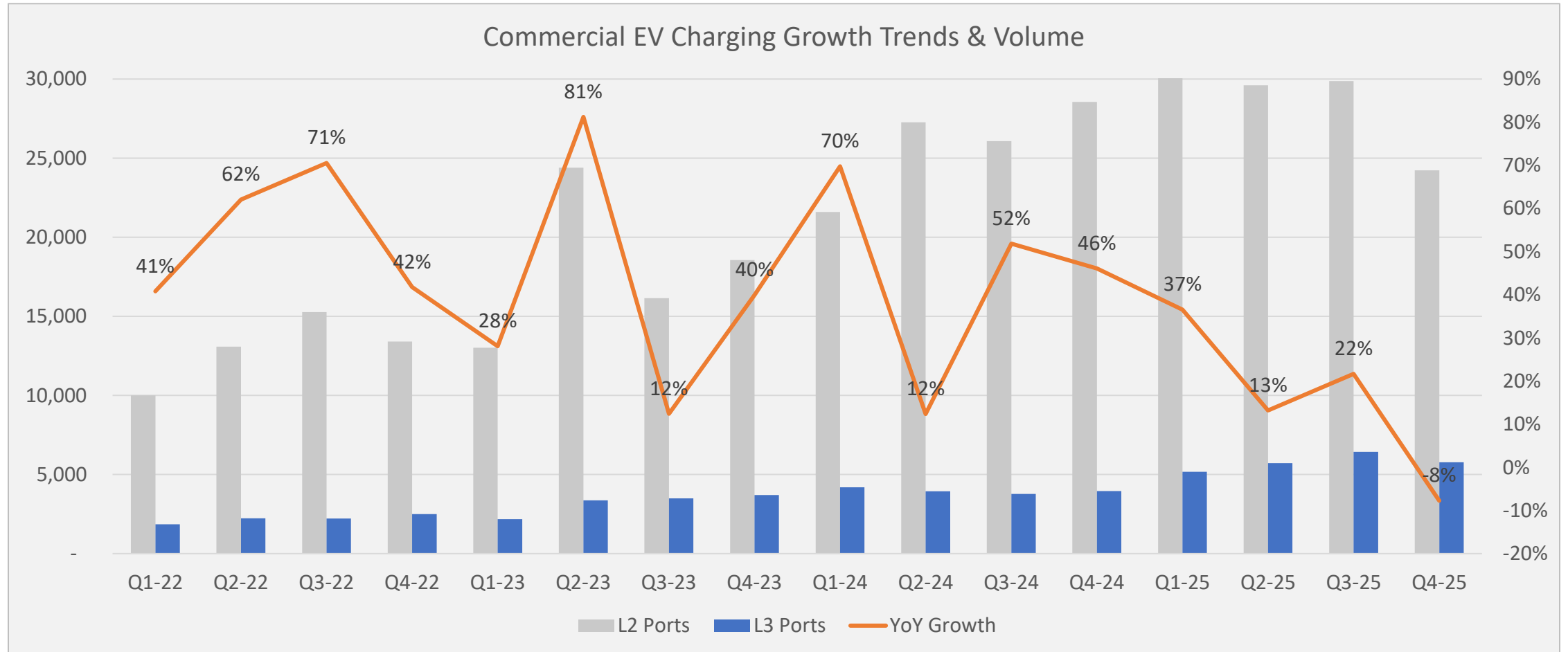
## US vs. Global EV Market Dynamics Fuel Mixed Outlook for 2026

Global EV sales grew 21% YoY in 2025 while US EV sales declined 2% YoY in 2025 with the sunset of the EV tax credit. Global EV growth, continued increase of US total EVs on the road, growth of the used EV market, BABA requirement uncertainty, and positive US EVSE deployment numbers are leading to a measured outlook for EVSE deployments in 2026.

# '25 a Record Year for AC & DC, Measured Outlook for '26



2025 was a record year for DC charging with a **46% YoY increase in ports** installed in 2025. AC charging grew **10% YoY** in 2025 but decreased **15% YoY** in Q4 2025. **Preliminary 2026 numbers** show project activity is down (**-15% YoY through February**) but total port counts are up (**+14% YoY through February**), signaling a focus on larger-scale deployments. Overall, our network remains optimistic on their outlook for the remainder of 2026, emphasizing that success is tied to strong product offerings and market positioning, not a reliance on subsidies.



# MCS is Here



As of early 2026, 3 charger OEMs, **Tesla**, **Zerova**, and **Kempower**, have deployed or announced MCS chargers at key pilot sites in the US to support Class 8 EVs. Tesla has announced the largest portfolio of MCS deployments thus far, partnering with Pilot Travel Centers at over 65 locations across the US. Arrival of the Tesla Semi is a catalyst for other MHD truck OEMs to compete in the EV space. Five more OEMs, **Autel Energy**, **ABB E-Mobility**, **Alpitronic**, **i-charging**, and **Power Electronics** have an MCS product in their line. Many of these OEMs have already deployed this technology in Europe, and we expect to see US deployment announcements later in 2026.

## US MCS Deployment Announcements

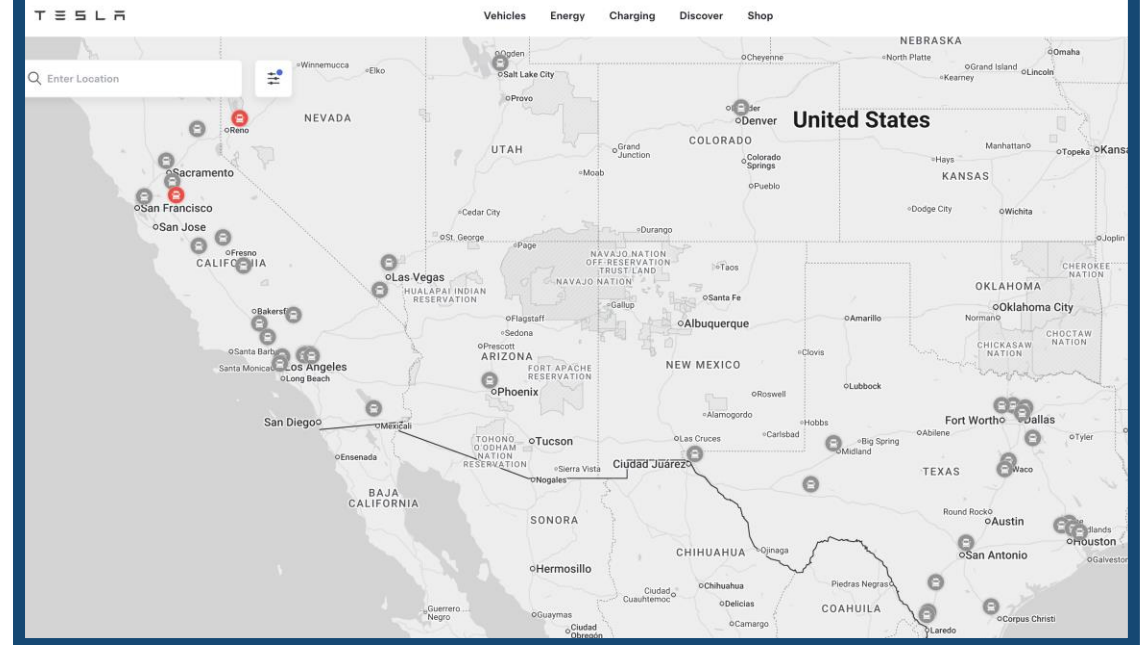


## Additional OEMs with MCS Products



## Tesla Mega Charger Site Announcements

65 Locations across 17 states




# DC Charging Integrating BESS

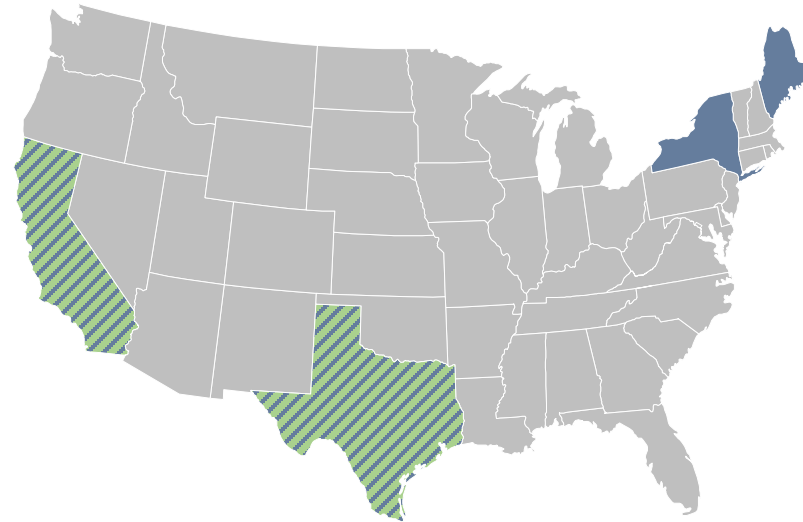


**2% of all DC EV charging projects incorporate BESS today.** Federal storage tax credits through 2033, rising utility rates, and VPP and V2G programs are making BESS increasingly attractive for improving site resiliency and project economics in the short to medium term for public charging and fleets. Companies like **Tesla, Autel, XCharge, Electric Era, Electrify America, PowerFlex, Synop, and ChargeNet** are early leaders in this category and Ohm expects DC charging projects to increasingly incorporate BESS in 2026.


**CA: Electrify America BESS & VPP**



**Q4 2025:** At the end of 2025, Electrify America operates more than 100 charging stations coupled with BESS in California. More than 50 of those stations are aggregated as a Virtual Power Plant (VPP) which bids into the California Independent System Operator (CAISO) wholesale energy market.




**ME: Rural Electric Era Site**



**3/23/26:** Revision Energy installed an Electric Era 4 port public DC station in Orno, ME with battery energy storage

**NY: EnergyPlus NY & XCharge**




**12/31/25:** EnergyPlus NY and XCharge are piloting one of the largest DCFC sites in the NYC area with 44 GridLink dual ports under the "EPlug" brand

**CA: Prologis's Denker Microgrid**




**12/28/23:** Hays Hal Construction installs 48 dual-port Zerova 360kw chargers and a 3.2 MWh BESS system for a Prologis site in Torrance

**CA: ChargeNet & Autel in Chula Vista**



**10/30/25:** ChargeNet is building 3 dual-port public DC stations at a Popeyes in Chula Vista, CA incorporating a 261 kWh Autel BESS system

**TX: Tesla Semi Chargers & Megapacks**

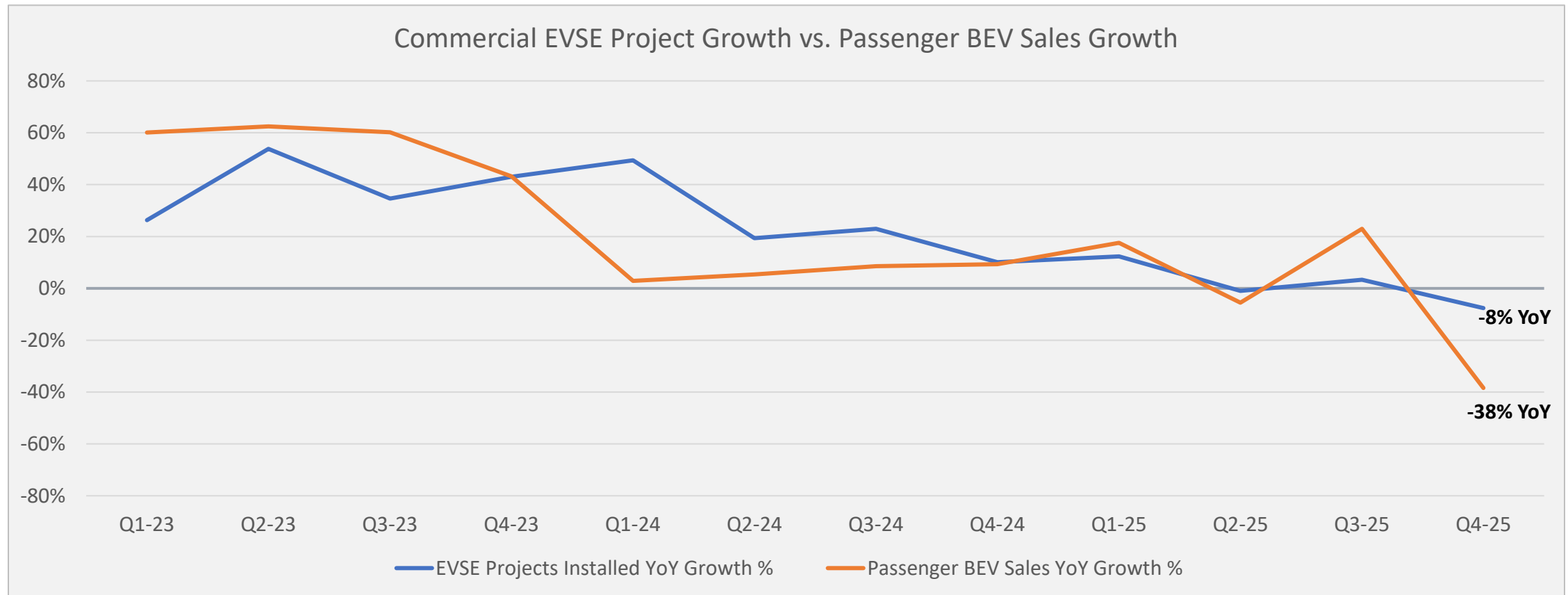


**Q4 '25:** Gpd Group is leading design for Tesla Semi Chargers in Haslet, TX. Tesla is also building Semi Chargers at a Frito Lay Facility in San Antonio coupled with BESS.

# EV Market Dynamics Fuel Mixed Outlook for 2026






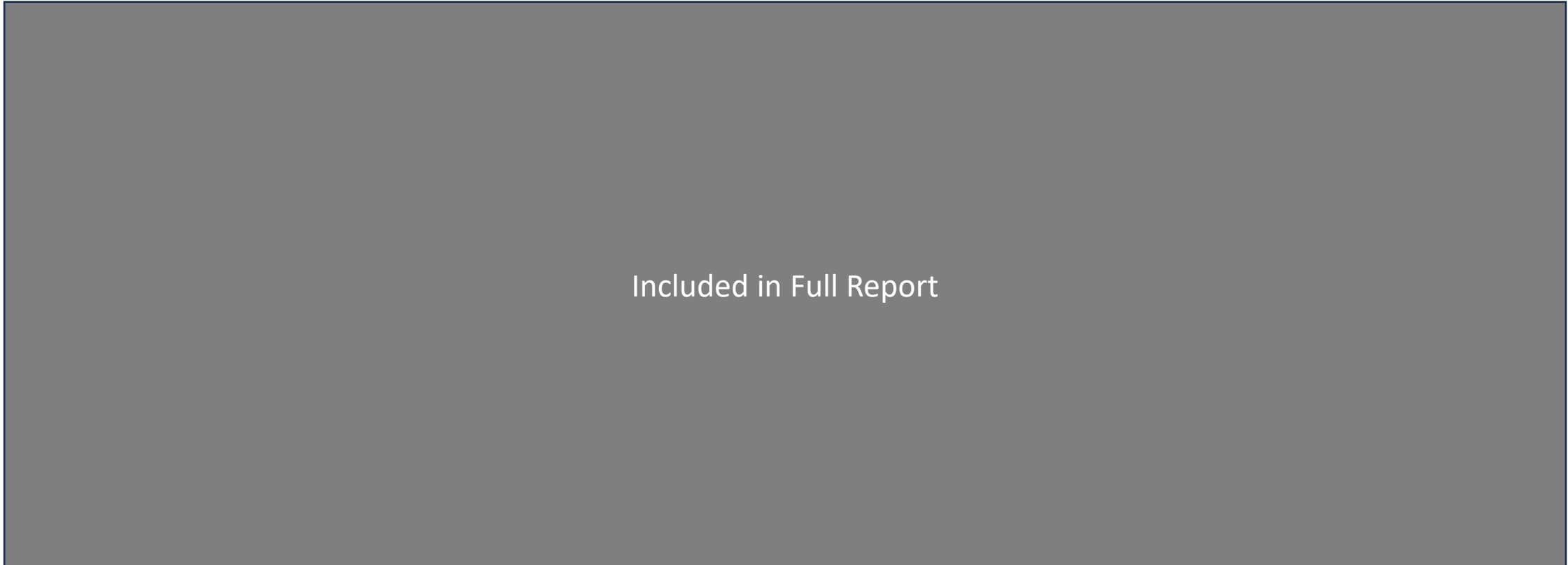
Changing federal policy landscape creates uncertainty for US automakers: 1) proposed roll back of US fuel economy standards removes requirement for automakers to increase EV sales and 2) sunset of EV tax credits caused EV sales to **decrease 38% YoY in Q4 2025**. Automakers are taking \$50B+ in losses on their EV ranges and facing increased pressure from Chinese OEMs. Softening of charging market growth follows a similar, but less drastic pattern (**-8% YoY in Q4**) compared to EV sales (**-38% YoY in Q4**). There is still demand for chargers to backfill gaps for EV drivers and state-level rebates for both passenger and fleet vehicles will help stimulate demand for EVs (see [page 23](#)). Growth in charging infrastructure is expected to be slightly down YoY in 2026.



# Top 10 CMS Providers: L2 Ports

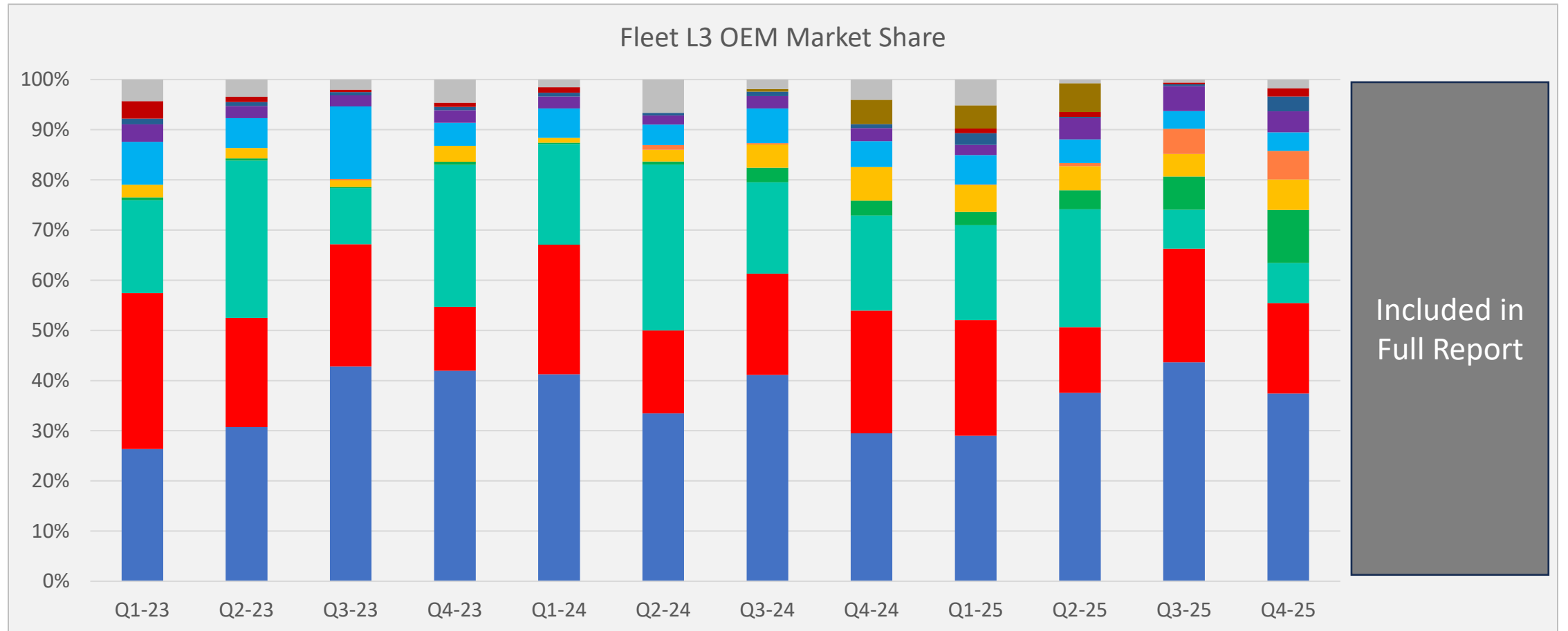
- **ChargePoint** operates 2.3 times as many L2 ports as the next largest software provider
- **PowerFlex** deployed the most L2 ports of any provider in 2025 across all commercial segments, nearly doubling the number of L2 ports on their CMS
- **Epic Charging** and **Orange Charger** are the fastest growing L2 CMS providers in 2025

CMS	All Time # L2 Ports	CMS	2025 # L2 Ports	CMS	YoY Growth (2025 vs. 2024)
 ChargePoint	139,862	 PowerFlex	29,324	 Epic Charging	137%



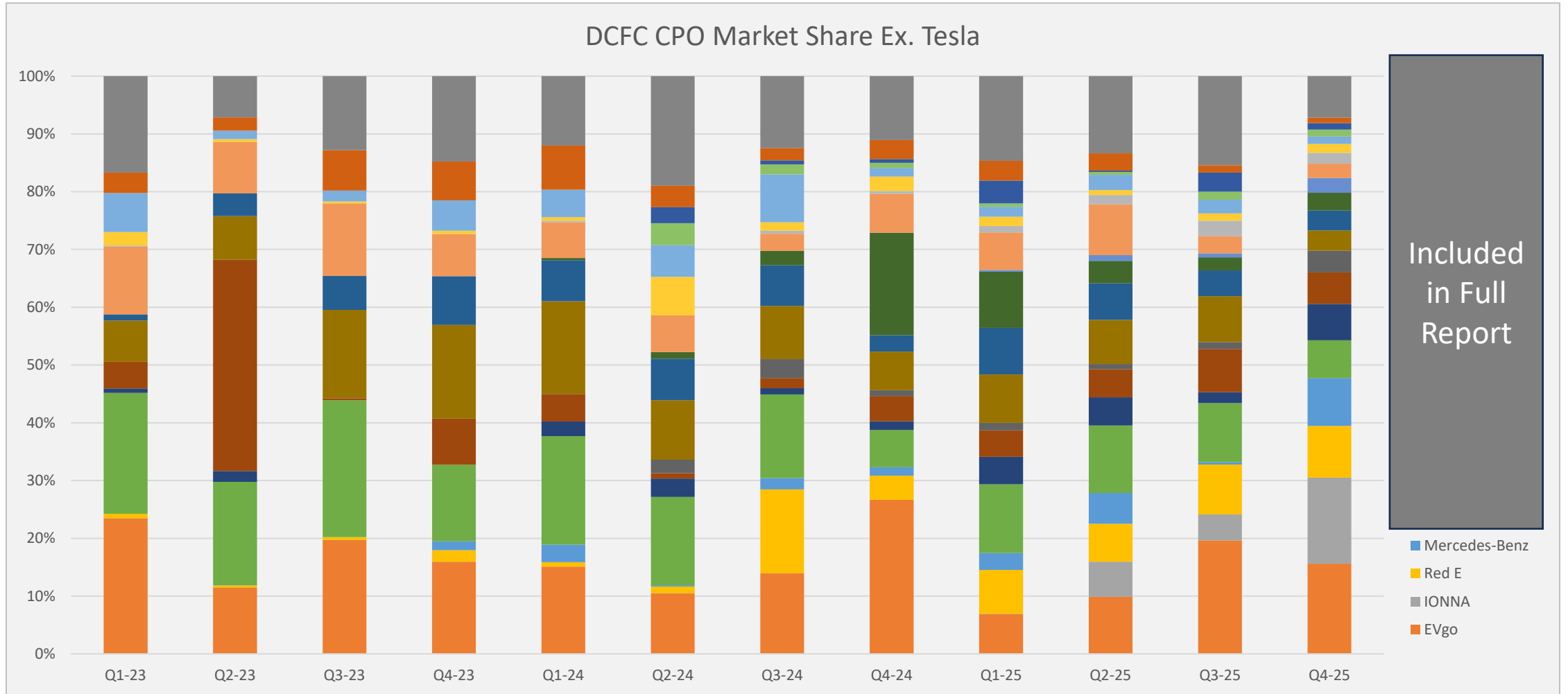
# Fleet L3 OEM Market Share

- **Infypower, ABB, and Zerova** are 2025's leading fleet DC charging OEMs
- **Autel** increased their fleet DC charging deployments by 4x YoY in Q4 2025 with deployments across e-commerce and school bus projects
- **Kempower** energized some of its first large-scale fleet deployments in the US in 2025, including a shared depot site for **EV Realty** and a school bus site for **Highland Electric Fleets**



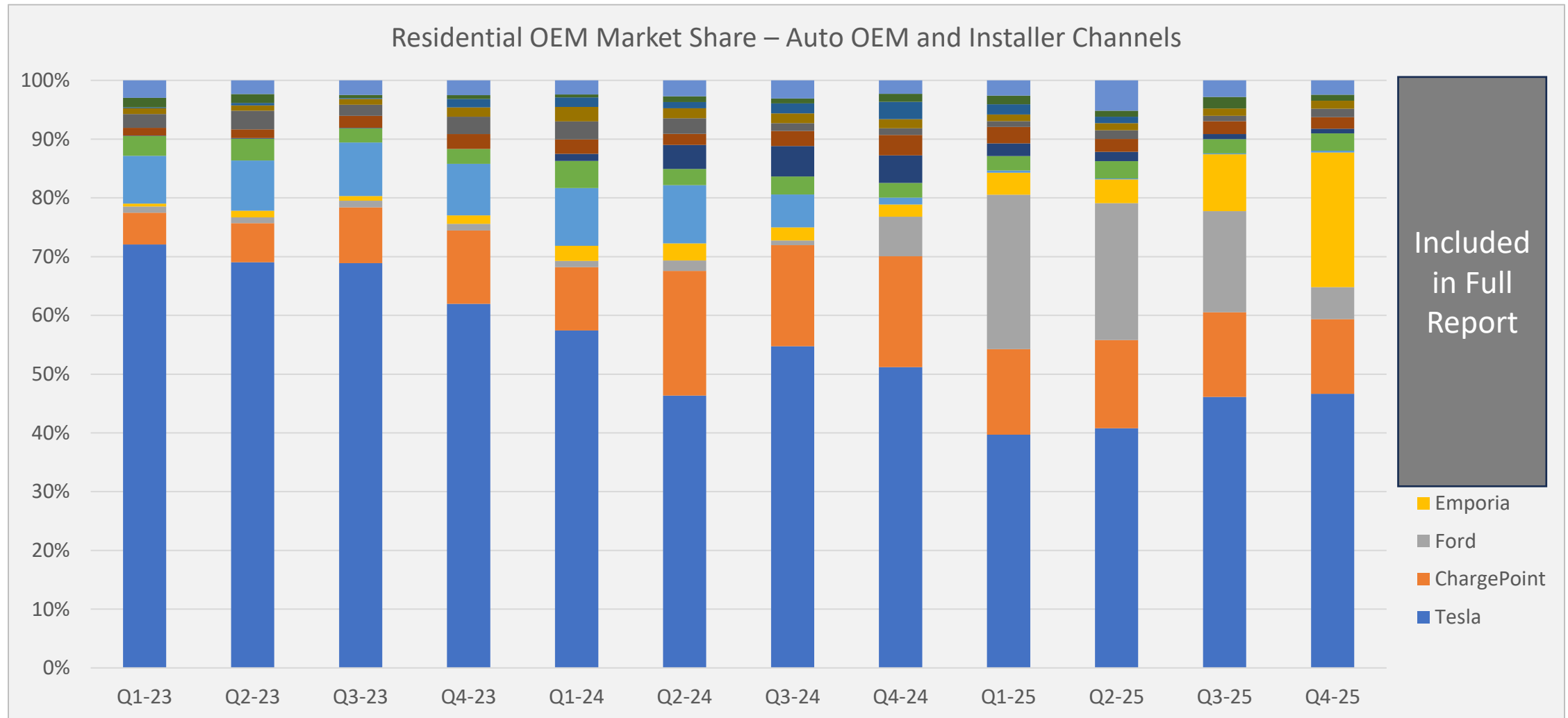
# Public DCFC CPO Market Share

- **Mercedes-Benz HPC** had its largest quarter on record in Q4 2025 with **230** DC ports deployed
- **Walmart Energy** reached 25 open locations at the end of 2025 and had 108 additional sites permitted in Q3 and Q4 which are expected to boost its footprint to over 1,000 DC ports by the end of 2026



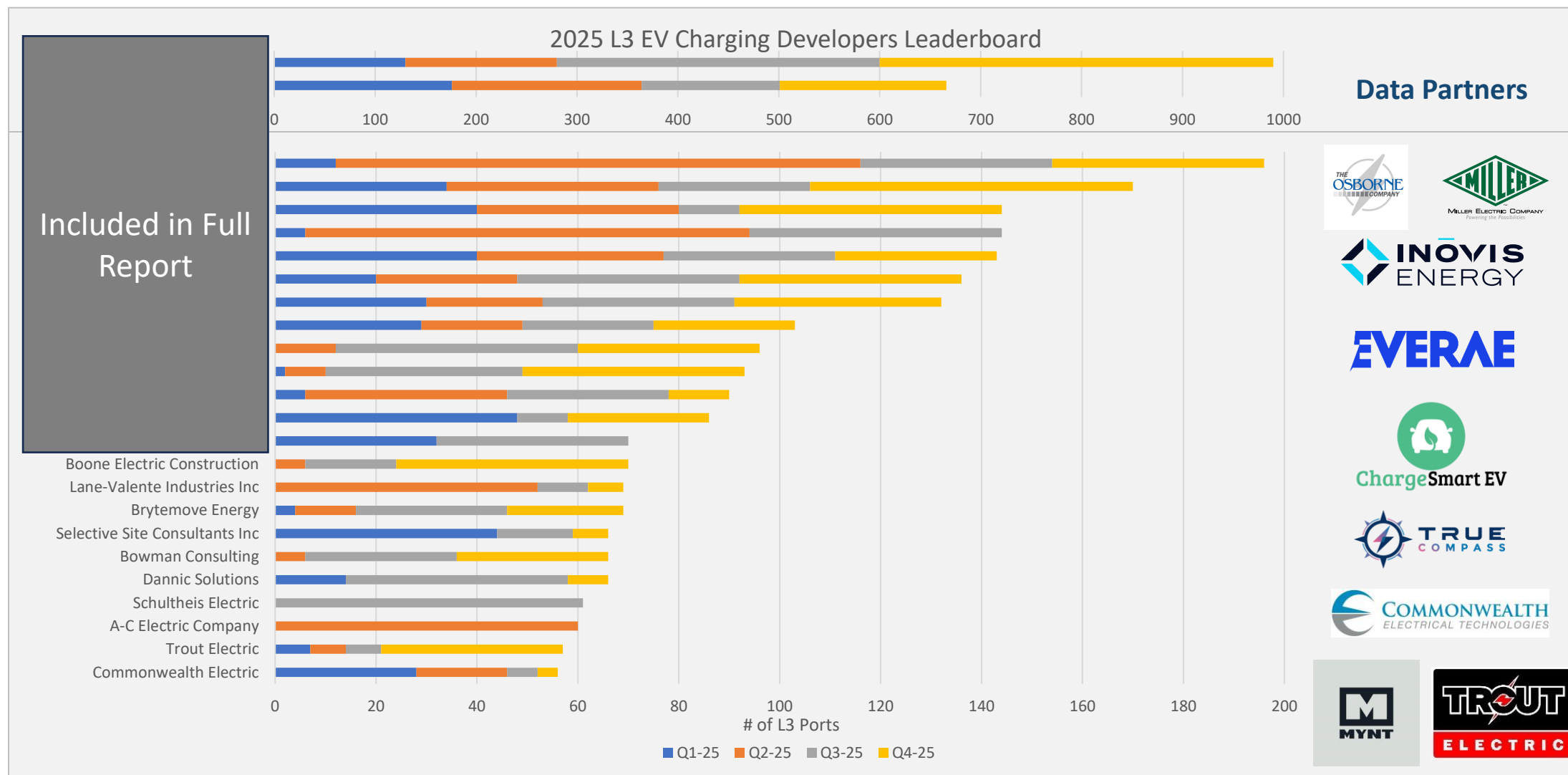
# Residential Charging OEM Market Share

- **Emporia climbed to 23%** market share in auto OEM and partner channels in Q4 2025
- **Ford Pro installations decreased 25% YoY in Q4 2025** with **Ford Lightning** sales down 60% YoY in Q4 and **Ford Mach-E** sales down 40% YoY in Q4



# Commercial L3 Developers

- **Osborne EV** nearly reached 1,000 ports for the year with installations for **IONNA** and **EVgo** while **Miller Electric** installed over 500 ports for **EVgo**
- **Inovis Energy** had its most active quarter of the year in Q4 with 64 **Autel** ports installed for **Red E** in **Massachusetts**



# Full Report Includes

## Executive Summary

### 2025 Commercial Charging Trends

- Growth Trends
- Commercial Growth By Segment and State
- Hardware Power Trends
- Top CMS Providers

### Markets and Policy

- EV Charging Policy Updates
- State Funding Program Updates

### Multi Family Charging Market

- Top Utilities
- OEM and CMS Market Share

### Fleet Charging Market

- Site Host Trends
- Top Utilities
- CMS Market Share

## Project Developer Leaderboards

- Notable Projects
- Top L2 and DCFC Project Developers
- Self Reported Totals

## Public Charging Market

- L2 Charging Market Shares (OEMs + CPOs)
- DCFC Market Shares (OEMs + CPOs)
- Q4 2025 CPO Announcements & Updates
- Site Host Analysis

## Residential Charging Market

- Growth Trends
- Residential Installer Leaderboard
- L2 Charger OEM Market Share