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ELECTRIC VEHICLE QUARTERLY REPORT

FOURTH QUARTER, 2024

IN PARTNERSHIP WITH:

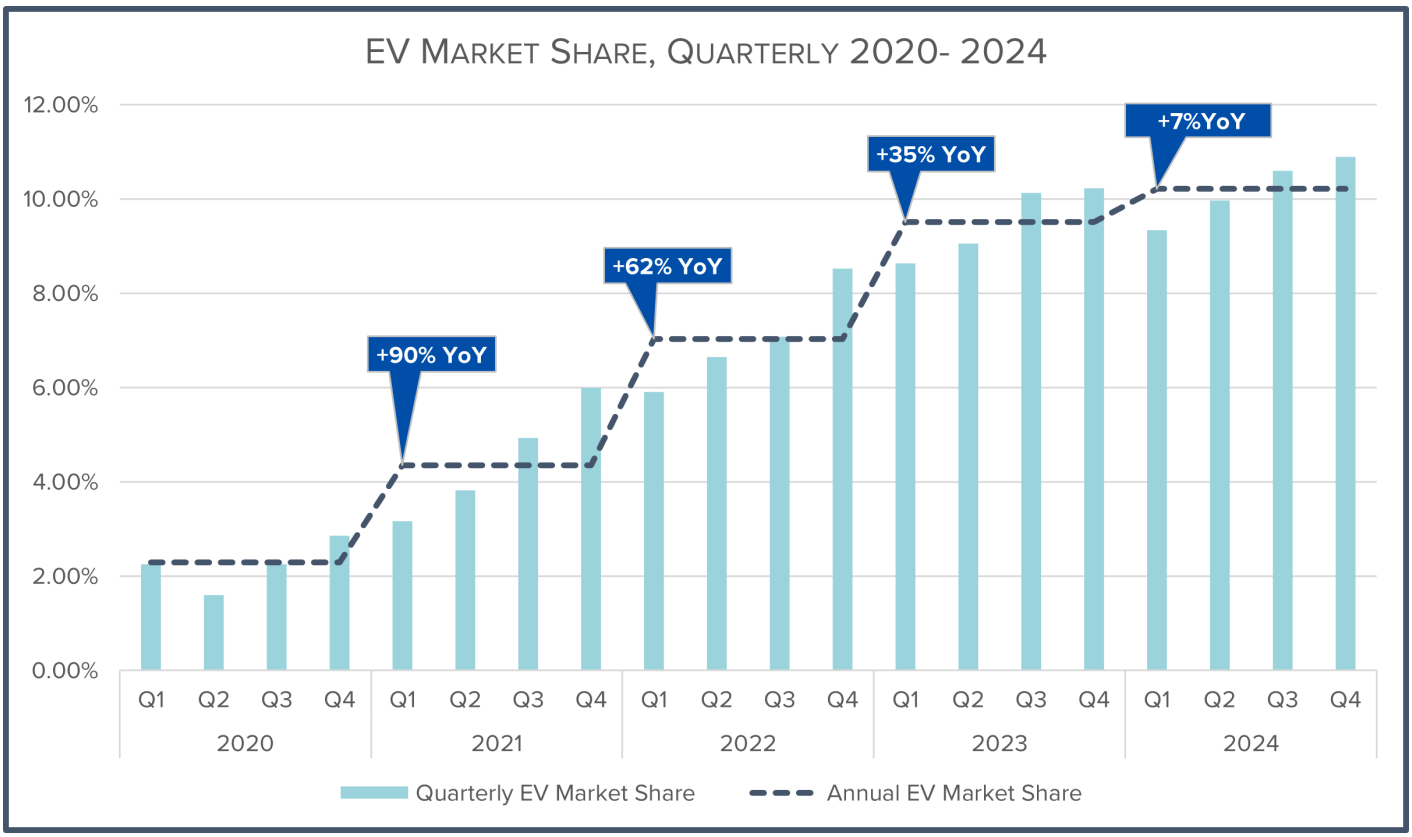
SBD

TABLE OF CONTENTS

ELECTRIC VEHICLE SALES OVERVIEW

Since our third quarter report, federal policies on EVs have shifted dramatically. 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 reporting the facts and figures on EV sales and charging infrastructure and closes with our spotlight on consumer EV incentives and related policies.

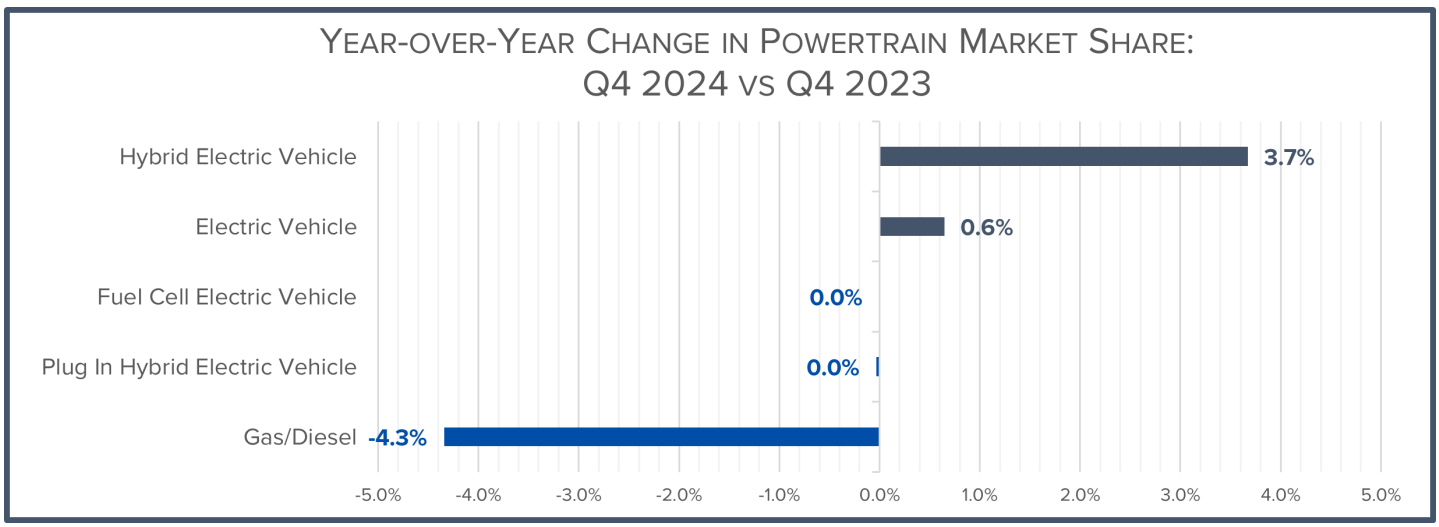
Q4 2024: In the fourth quarter of 2024, automakers sold 433,843 electric vehicles (EVs, including battery, plug-in hybrid, and fuel cell electric vehicles) in the United States, representing 10.9 percent of overall light-duty vehicle sales. This represents a 0.3 percentage point (pp) market share increase over the third quarter of 2024 amounting to an increase of about 24,000 vehicle sales – making EV Sales volume in Q4 the highest on record. December 2024 also had the highest EV market share on record at 12.3%. Time will tell if fourth quarter EV sales were a pull-ahead. In 2022, 2023, and 2024, Q1 sales dropped after peaking in Q4 of the preceding year.

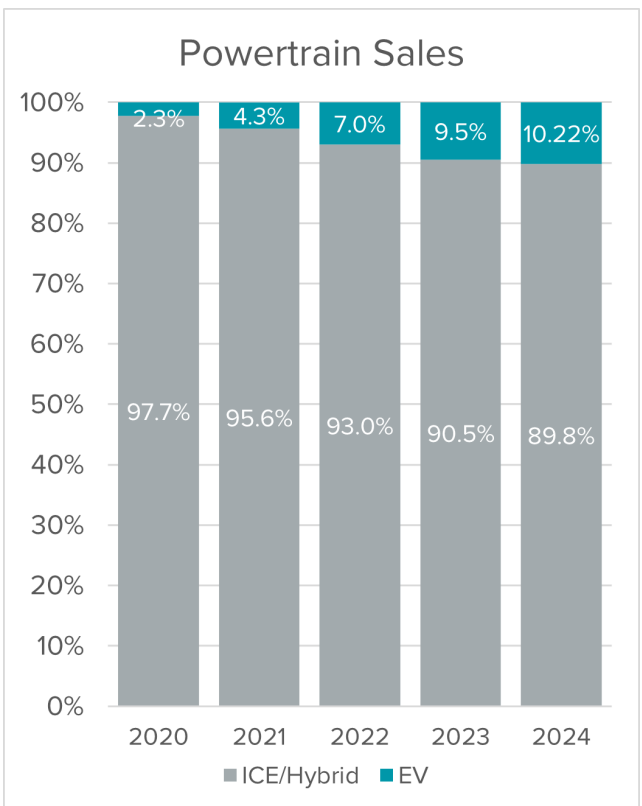


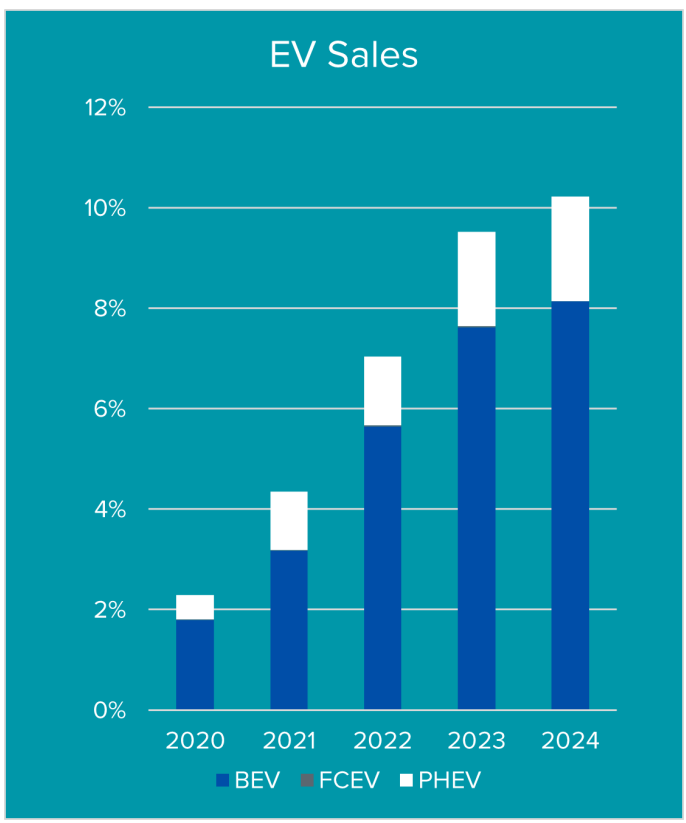
* See appendix - A for month-by-month EV market share

Year-Over-Year (Q4 2023 vs Q4 2024): Year-over-year (YoY), EV market share increased 0.7 pp from the fourth quarter of 2023. The total volume of all light-duty sales in Q4 2024 was 8 percent higher than Q4 2023, while the volume for EVs increased 15 percent (an increase of about 56,000 vehicles). For comparison, internal combustion engine (ICE) vehicle market share decreased by 4.3 pp during Q4 2024 compared to the same period last year. Nearly all of the ICE market share loss was from gains of traditional hybrids with smaller increases in electric vehicles, offset slightly by market share losses from PHEVs and FCEVs.

Year-toDate (2024 Full Year): Despite a slow start in Q1, nearly 1.58 million EVs were sold in 2024, 10.2 percent of all light vehicle sales, resulting in a relatively flat increased market share of 0.7 pp over 2023. The total volume of all light-duty sales for the year was up 3.6 percent from 2023, while the volume for EVs increased 11 percent (about 159,000 vehicles).

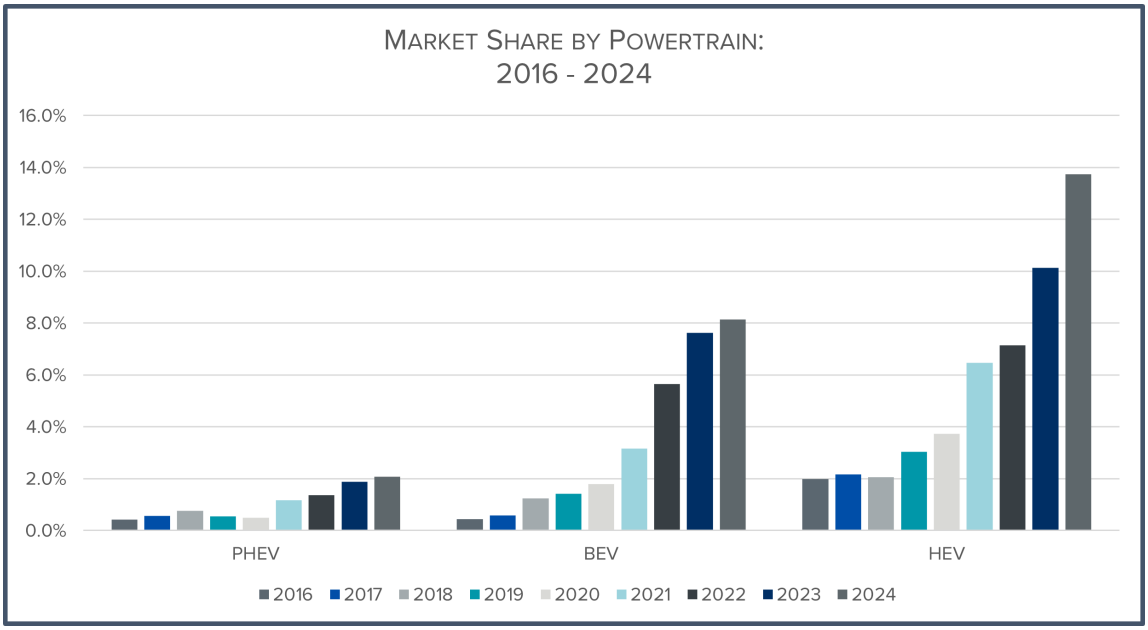




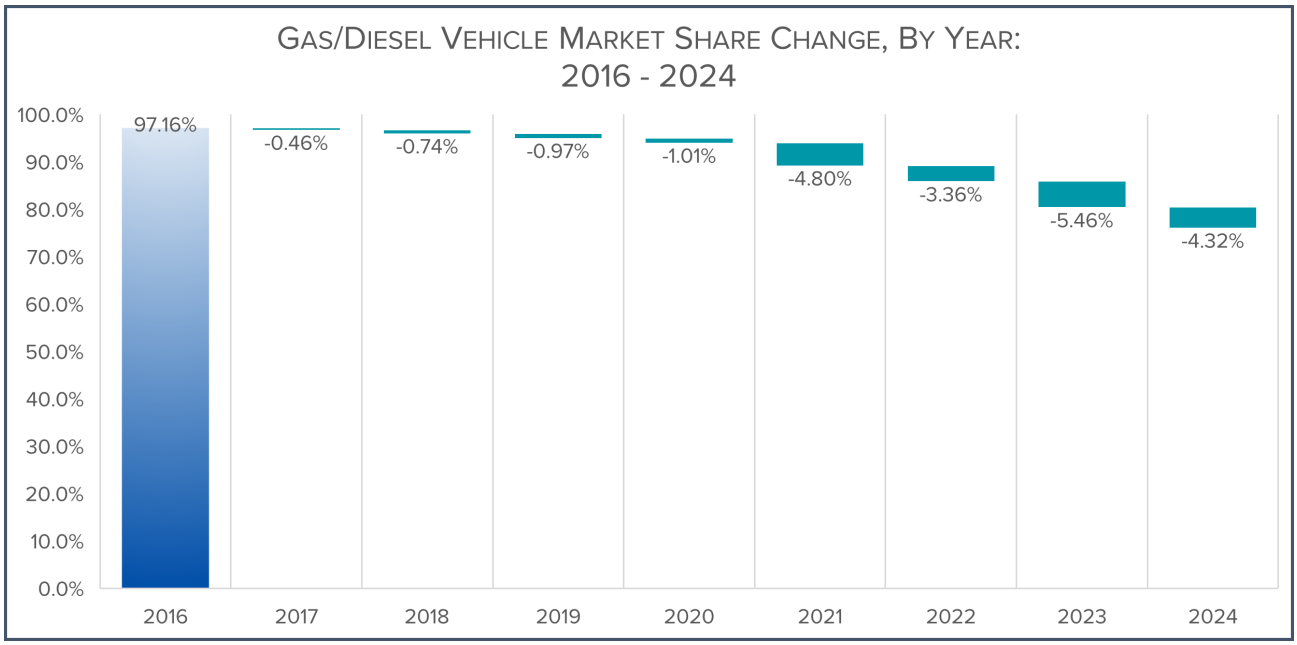


EVOLVING MARKET SHARE OF POWERTRAINS: 2016 - 2024

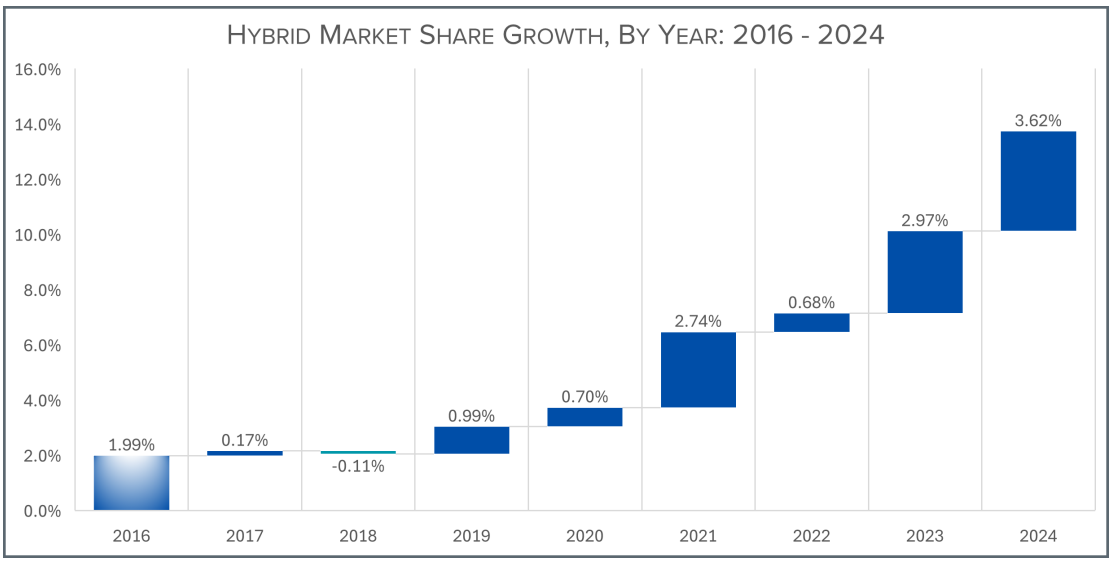
From 2016 through 2024, traditional internal combustion engine (ICE) market share steadily declined. In 2016, ICE vehicles comprised more than 97 percent of all vehicle sales. Through the fourth quarter of 2024, the year-to-date ICE share dropped to 76 percent for an overall loss of 21 pp. The ICE market share was replaced by increases in share of traditional hybrids, BEVs, and PHEVs. Traditional hybrids made up most of the alternative vehicle gains (+11.7 pp) followed by BEVs (+7.7 pp) and PHEVs (+1.7 pp) over the last nine years.



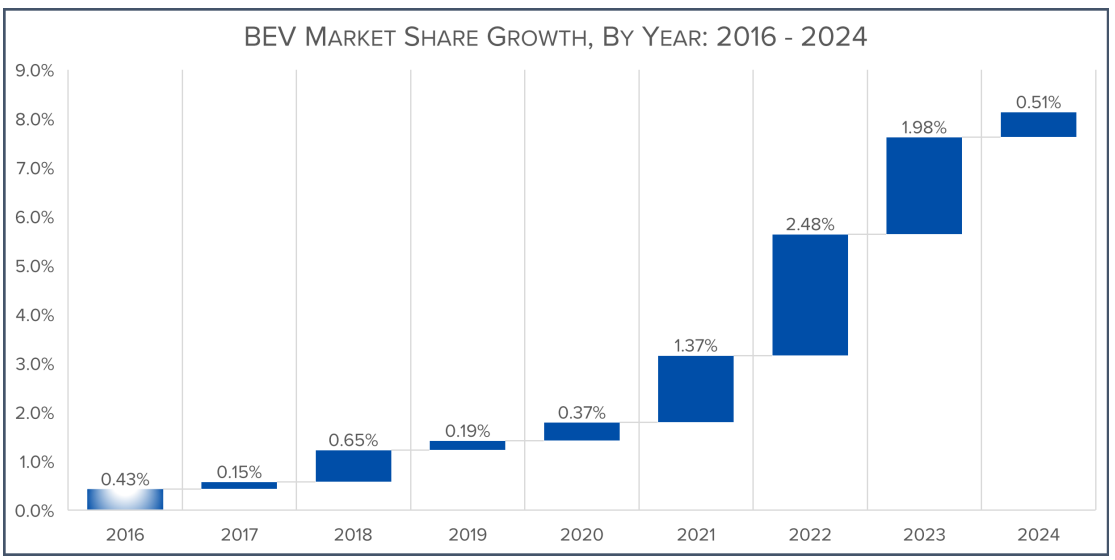
ICE market share decreased from 97 percent in 2016 to 76 percent through 2024 (-21 pp):



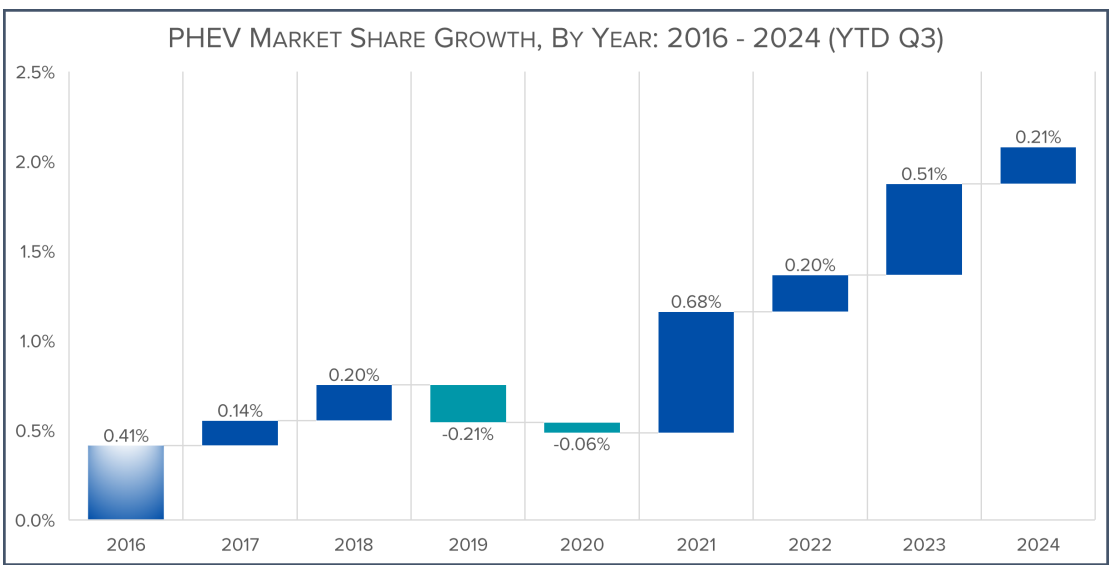
Hybrid market share grew from 2 percent in 2016 to 13.7 percent through 2024 (+11.7 pp):



BEV market share grew from .43 percent in 2016 to 8.1 percent through 2024 (+7.7 pp):



PHEV market share grew from .41 percent in 2016 to 2.1 percent through 2024 (+1.7 pp):



See Additional Historic Data on EV Sales

ELECTRIC VEHICLE SALES BY SEGMENT

EV Model Availability

144 Vehicle Models Sold in Q4 2024:

83 Battery Electric Vehicles
- 21 Cars
- 47 Utility Vehicles
- 6 Pickups
- 9 Vans

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

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

**Includes Plug-In Hybrid Fuel Cell*

See more information about ***EV CHOICE HERE***

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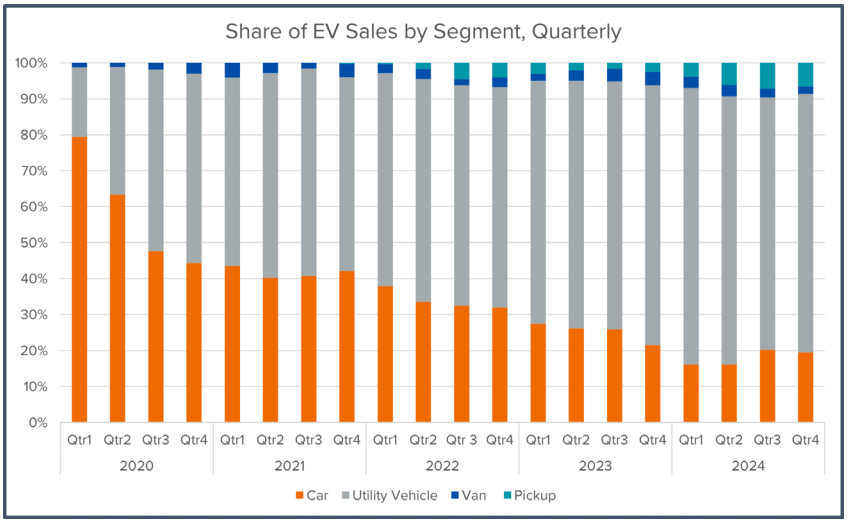
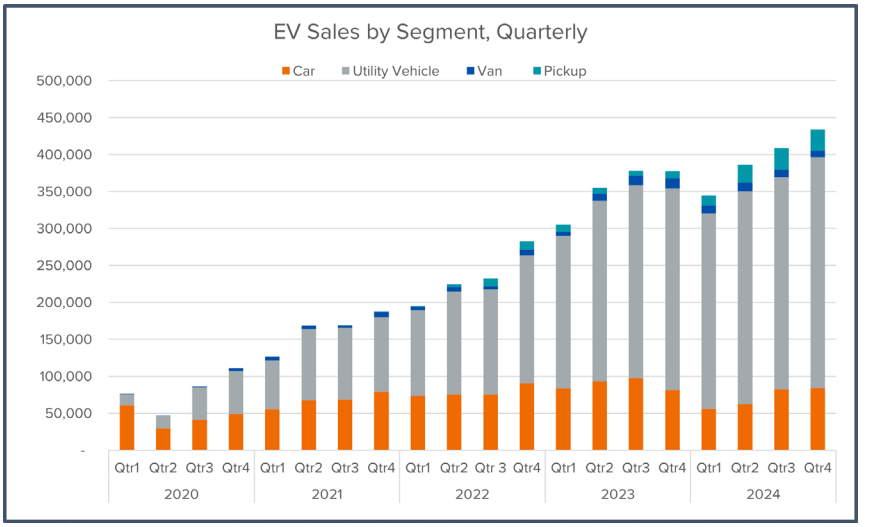
While passenger cars once dominated the EV market, manufacturers continue to introduce new models to satisfy a variety of consumer needs. Utility vehicle (UV) offerings continue to grow, and while electric pickup trucks are a relatively new entry to the market (making their commercial debut in September 2021), there are 6 models available now, with more expected soon. As a result, non-car segments are continuing to make gains, and in the fourth quarter of 2024, light truck (UVs, minivans, and pickups) sales comprised 81 percent of the EV market – a 2 pp increase over the fourth quarter of 2023.

Quarterly sales of BEV and PHEV UVs have grown from about 19 percent of EVs at the start of 2020 to 72 percent in the fourth quarter of 2024. More than 39,000 more UVs were sold in the fourth quarter of 2024 than the fourth quarter of 2023.

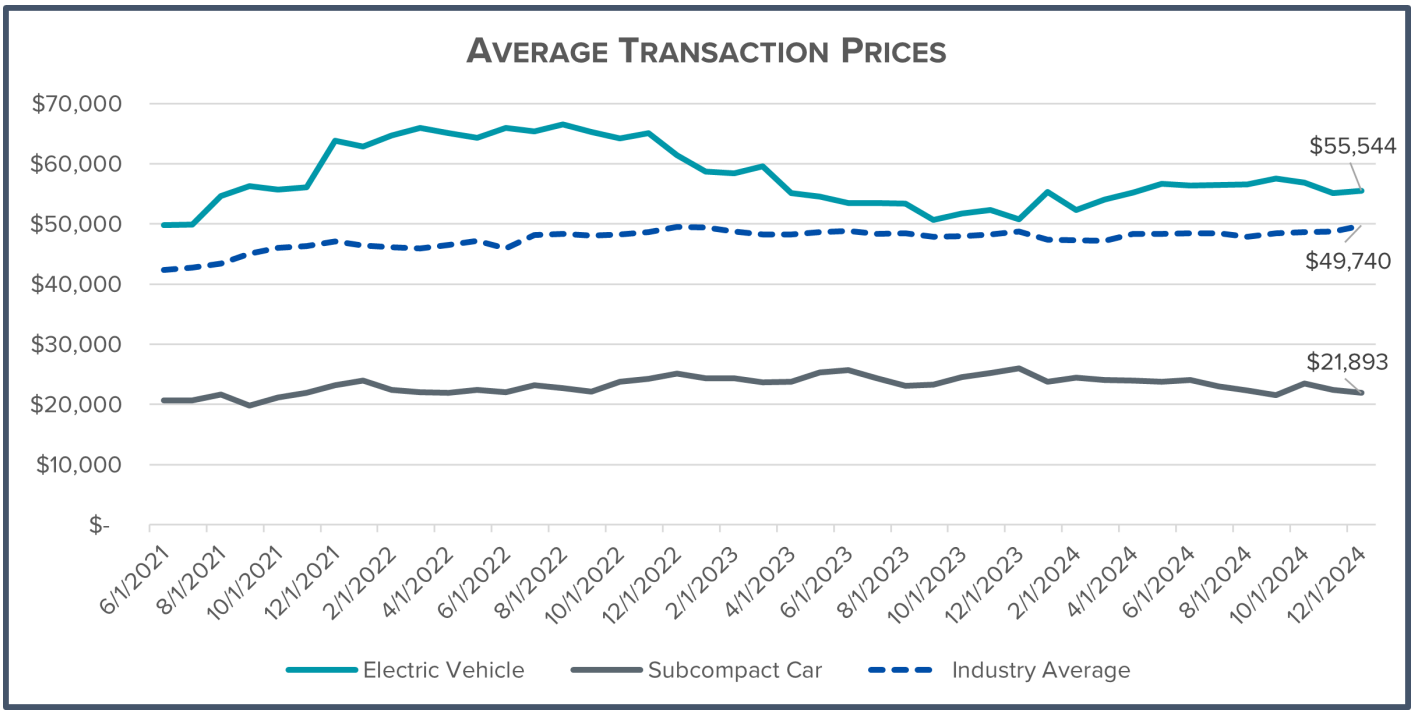




Source: Figures compiled by Alliance for Automotive Innovation with new registrations for retail and fleet data provided by S&P Global Mobility covering January 1, 2020 – December 31, 2024

ELECTRIC VEHICLE TRANSACTION PRICES

"In December, the average transaction price for new electric vehicles was $55,544, marking a 1.1% increase from the previous month and a 0.8% rise from the previous year. EV incentives were equal to 14.3% of the ATP [average transaction price] last month, which was lower than in November when EV incentives were equal to 14.7%. In December, the ATP for a new EV was $6,274 higher than the ICE+ ATP ($49,270), the second-lowest premium in 2024. The top five most affordable EVs in December were the Nissan Leaf, Fiat 500e, Hyundai Kona, Kia Niro and Chevrolet Equinox."[1]



(Compiled from Kelley Blue Book Press Releases, 6/2021 – 12/2024)

[1] Cox Automotive, "EV Market Monitor – December 2024," 1/21/2025

ELECTRIC VEHICLE SALES BY STATE

For the Fourth Quarter of 2024:

For the first time ever, Colorado overtook California to lead the nation in EV sales, with BEVs and PHEVs making up 26.4 percent of new light-duty vehicle registrations in the fourth quarter of 2024. However, California was a close second with 26.2 percent, including fuel cells. Colorado made the biggest gains in EV market share after increasing 8 pp year-over-year. These figures are a testament to the continuing support California and Colorado provide for developing their EV markets, including purchase incentives and investments in infrastructure.

Colorado, California, Washington, and the District of Columbia were all above 20 percent market share in Q4. There are currently thirteen additional states with new EV registrations above 10 percent (but below 20 percent).

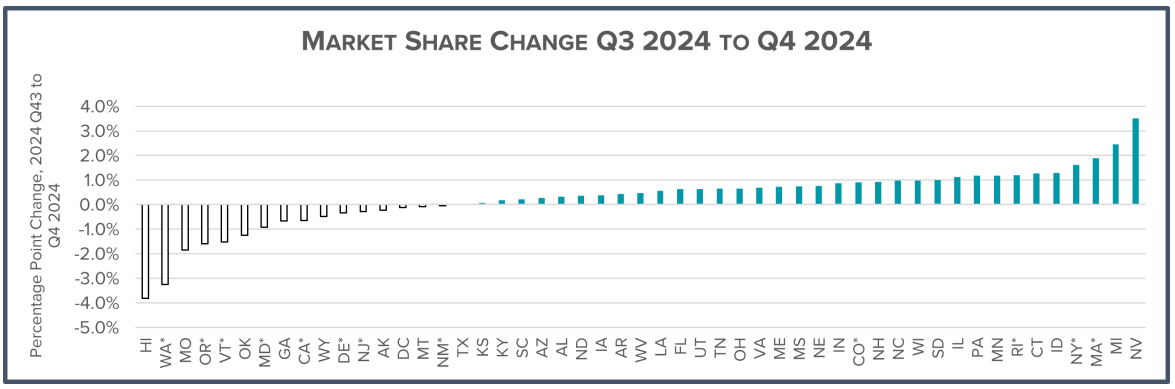
2024 EV Market Share by State (Q4)

1	CO*	26.40%	**11**	VT*	12.15%	**21**	IL	8.66%	**31**	OH	6.06%	**41**	IA	4.21%
2	CA*	26.19%	**12**	DE	11.54%	**22**	NC	8.50%	**32**	TN	5.79%	**42**	AL	3.80%
3	WA*	21.34%	**13**	NY*	11.45%	**23**	MN*	8.34%	**33**	WI	5.72%	**43**	AK	3.77%
4	DC	20.31%	**14**	VA*	10.79%	**24**	GA	8.07%	**34**	NM	5.53%	**44**	SD	3.63%
5	NV*	16.64%	**15**	FL	10.34%	**25**	PA	8.01%	**35**	NE	5.46%	**45**	AR	3.12%
6	OR*	15.40%	**16**	HI	10.31%	**26**	ME*	7.48%	**36**	MO	5.44%	**46**	WV	2.78%
7	NJ*	15.31%	**17**	UT	10.16%	**27**	TX	6.78%	**37**	KS	5.42%	**47**	LA	2.71%
8	MA*	14.15%	**18**	AZ	9.58%	**28**	NH	6.75%	**38**	SC	4.75%	**48**	WY	2.70%
9	CT*	12.42%	**19**	RI*	9.56%	**29**	ID	6.26%	**39**	MT	4.43%	**49**	MS	2.19%
10	MD*	12.28%	**20**	MI	8.96%	**30**	IN	6.17%	**40**	KY	4.39%	**50**	ND	2.17%
												51	OK	1.32%

Year-over-year, for the fourth quarter of 2024, the market share of new EVs registered increased in more than three-quarters of the states. Four states witnessed an increased market share of EVs by 2 pp or more. Making the largest increases were Colorado[2] (8.2 pp), Michigan (4.8 pp), Nevada (3.2 pp), and Delaware (2.6 pp).

More than two-thirds of states saw market share growth in Q4 vs. Q3 – eleven states saw a market share increase of one percentage point or more. Nevada led all states, quarter over quarter, with an increase of 3.5 pp.

Sixteen states had a market share decrease from 3Q to 4Q, 2024, including three states which previously adopted the California ACC II ZEV Mandate. Hawaii decreased the most (-3.8 pp).



[2] Colorado taxpayers are eligible for a state tax credit of $5,000 for the purchase or lease of a new EV on or after July 1, 2023 with a manufacturer's suggested retail price (MSRP) up to $80,000. Lease agreements must have an initial term of at least two years. Beginning January 1, 2024, Coloradans purchasing an EV with an MSRP up to $35,000 will be eligible for an additional $2,500 tax credit.

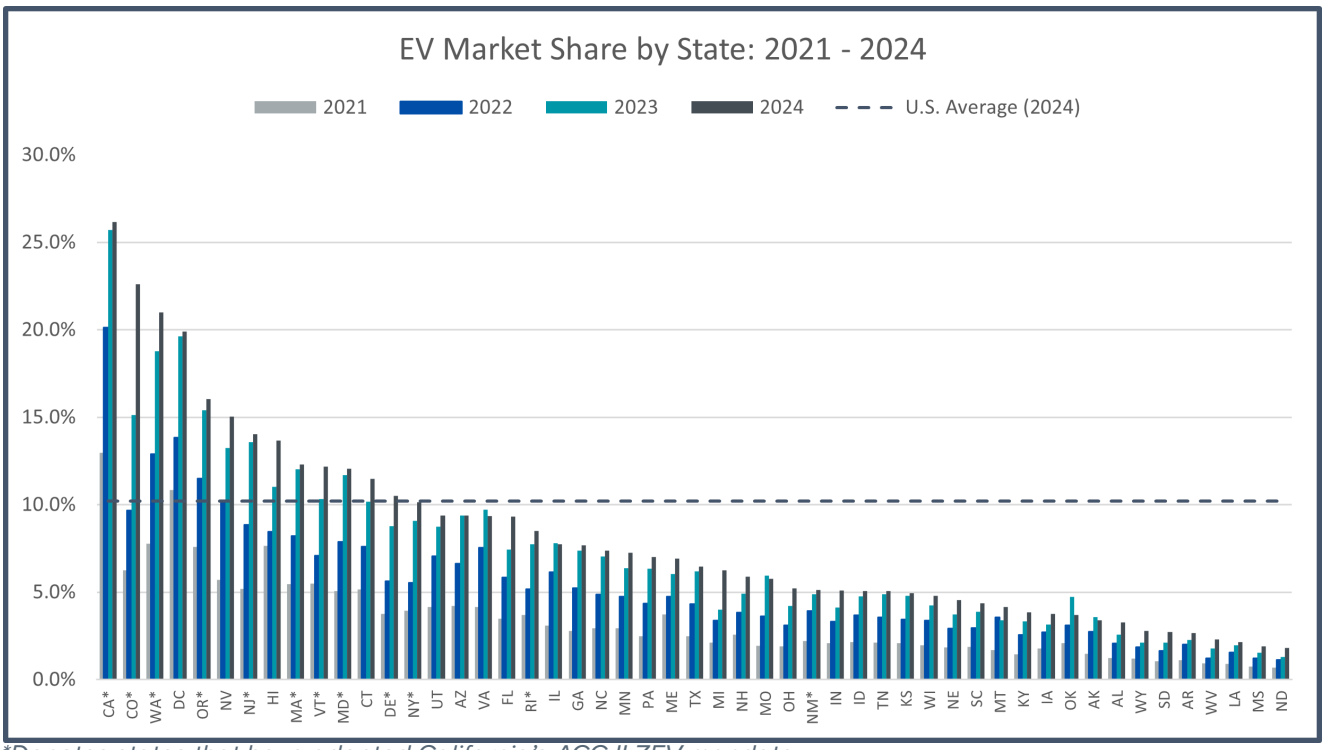
[3] *Denotes states that have adopted California's ACC II ZEV Mandate

For the Full Year of 2024:

For 2024, EV sales represented 10.2 percent of the market – a 0.7 pp increase over 2023. More than 26 percent of sales in California were EVs, but Colorado realized the greatest increase in market share, year-over-year with a 7.5 pp increase. Following Colorado, the states with the largest market share gains were Hawaii (2.6 pp), Michigan (2.3 pp), Washington (2.2 pp), Florida (1.9), and Vermont (1.9). Thirteen states increased their year-over-year EV market share by 1 pp or more. Four states had decreased market share year-over-year including Missouri, Alaska, Virginia, and Oklahoma.

While some states continue to have strong EV sales, seven states had new EV registrations of less than 3 percent; three of those states were under 2 percent. All states had a market share above 1 percent for new EV sales.

In 2024, thirteen states and the District of Columbia had an EV market share above 10 percent while two states had an EV market share under 2 percent; California, Colorado, and Washington were the only states above 20 percent. [4]



**Denotes states that have adopted California's ACC II ZEV mandate*

2024 EV Market Share by State

1	CA*	26.15%	**11**	MD*	12.06%	**21**	GA	7.69%	**31**	NM*	5.14%	**41**	IA	3.75%
2	CO*	22.59%	**12**	CT	11.48%	**22**	NC	7.36%	**32**	IN	5.09%	**42**	OK	3.70%
3	WA*	21.00%	**13**	DE*	10.52%	**23**	MN	7.25%	**33**	ID	5.07%	**43**	AK	3.39%
4	DC	19.90%	**14**	NY*	10.15%	**24**	PA	7.00%	**34**	TN	5.05%	**44**	AL	3.26%
5	OR*	16.05%	**15**	UT	9.39%	**25**	ME	6.93%	**35**	KS	4.96%	**45**	WY	2.77%
6	NV	15.02%	**16**	AZ	9.38%	**26**	TX	6.48%	**36**	WI	4.80%	**46**	SD	2.71%
7	NJ*	14.05%	**17**	VA	9.34%	**27**	MI	6.26%	**37**	NE	4.55%	**47**	AR	2.65%
8	HI	13.66%	**18**	FL	9.31%	**28**	NH	5.90%	**38**	SC	4.35%	**48**	WV	2.29%
9	MA*	12.29%	**19**	RI*	8.50%	**29**	MO	5.78%	**39**	MT	4.15%	**49**	LA	2.15%
10	VT*	12.19%	**20**	IL	7.76%	**30**	OH	5.23%	**40**	KY	3.85%	**50**	MS	1.90%
												51	ND	1.81%

[4] 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 – December 31, 2024

Fourth Quarter 2024, New Light-Duty Vehicle Registrations By Powertrain					Change In Market Share (2024 Q4 vs 2023 Q4), 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	0.89%	2.87%	0.00%	**3.77%**	0.32	-0.30	0.00	**0.02**
AL	0.73%	3.07%	0.00%	**3.80%**	-0.17	1.10	0.00	**0.93**
AR	0.66%	2.46%	0.00%	**3.12%**	0.07	0.58	0.00	**0.65**
AZ	1.52%	8.06%	0.00%	**9.58%**	0.09	-0.92	0.00	**-0.82**
CA*	3.82%	22.33%	0.04%	**26.19%**	0.31	1.02	-0.01	**1.32**
CO*	5.68%	20.72%	0.00%	**26.40%**	1.17	7.06	0.00	**8.23**
CT	4.33%	8.09%	0.00%	**12.42%**	0.58	0.98	0.00	**1.56**
DC	5.01%	15.31%	0.00%	**20.31%**	0.76	-0.91	0.00	**-0.16**
DE*	2.44%	9.10%	0.00%	**11.54%**	0.09	2.47	0.00	**2.56**
FL	1.63%	8.71%	0.00%	**10.34%**	0.63	0.95	0.00	**1.58**
GA	1.22%	6.85%	0.00%	**8.07%**	-0.05	0.61	0.00	**0.56**
HI	1.50%	8.81%	0.00%	**10.31%**	-0.42	-0.84	0.00	**-1.26**
IA	1.18%	3.03%	0.00%	**4.21%**	0.28	0.54	0.00	**0.82**
ID	1.54%	4.72%	0.00%	**6.26%**	-0.12	0.82	0.00	**0.70**
IL	1.91%	6.75%	0.00%	**8.66%**	0.23	-0.12	0.00	**0.11**
IN	1.39%	4.78%	0.00%	**6.17%**	0.09	1.23	0.00	**1.32**
KS	1.28%	4.14%	0.00%	**5.42%**	-0.18	-0.15	0.00	**-0.32**
KY	1.04%	3.35%	0.00%	**4.39%**	0.30	0.64	0.00	**0.94**
LA	0.50%	2.21%	0.00%	**2.71%**	-0.32	0.79	0.00	**0.47**
MA*	3.86%	10.29%	0.00%	**14.15%**	0.00	1.57	0.00	**1.57**
MD*	2.66%	9.62%	0.00%	**12.28%**	-0.99	-0.29	0.00	**-1.29**
ME	2.95%	4.53%	0.00%	**7.48%**	-0.25	0.96	0.00	**0.71**
MI	1.45%	7.50%	0.00%	**8.96%**	0.55	4.25	0.00	**4.80**
MN	2.32%	6.02%	0.00%	**8.34%**	0.52	0.64	0.00	**1.16**
MO	1.50%	3.94%	0.00%	**5.44%**	0.28	0.06	0.00	**0.34**
MS	0.42%	1.77%	0.00%	**2.19%**	-0.37	0.53	0.00	**0.16**
MT	1.94%	2.50%	0.00%	**4.43%**	0.41	-0.21	0.00	**0.20**
NC	1.63%	6.86%	0.00%	**8.50%**	0.41	0.85	0.00	**1.26**
ND	0.53%	1.64%	0.00%	**2.17%**	0.15	0.84	0.00	**0.99**
NE	1.51%	3.95%	0.00%	**5.46%**	0.05	1.08	0.00	**1.13**
NH	2.45%	4.30%	0.00%	**6.75%**	0.42	0.81	0.00	**1.23**
NJ*	3.39%	11.92%	0.00%	**15.31%**	0.51	0.21	0.00	**0.72**
NM*	1.42%	4.12%	0.00%	**5.53%**	0.34	0.10	0.00	**0.44**
NV	1.97%	14.67%	0.00%	**16.64%**	0.18	3.02	0.00	**3.20**
NY*	4.09%	7.36%	0.00%	**11.45%**	0.40	-0.81	0.00	**-0.41**
OH	1.46%	4.60%	0.00%	**6.06%**	-0.26	1.26	0.00	**0.99**
OK	0.43%	0.89%	0.00%	**1.32%**	-6.96	-1.71	0.00	**-8.67**
OR*	4.02%	11.38%	0.00%	**15.40%**	0.00	-0.84	0.00	**-0.84**
PA	2.58%	5.42%	0.00%	**8.01%**	0.27	1.05	0.00	**1.32**
RI*	3.07%	6.49%	0.00%	**9.56%**	-0.69	1.47	0.00	**0.77**
SC	1.21%	3.53%	0.00%	**4.75%**	0.17	0.52	0.00	**0.69**
SD	1.59%	2.03%	0.00%	**3.63%**	0.60	0.55	0.00	**1.15**
TN	0.97%	4.82%	0.00%	**5.79%**	0.30	0.31	0.00	**0.61**
TX	0.96%	5.82%	0.00%	**6.78%**	0.04	0.35	0.00	**0.39**
UT	1.94%	8.22%	0.00%	**10.16%**	-0.03	0.22	0.00	**0.19**
VA	2.23%	8.55%	0.00%	**10.79%**	0.66	0.22	0.00	**0.88**
VT*	3.99%	8.16%	0.00%	**12.15%**	-0.14	-0.05	0.00	**-0.19**
WA*	3.38%	17.96%	0.00%	**21.34%**	0.25	1.72	0.00	**1.97**
WI	1.39%	4.33%	0.00%	**5.72%**	0.45	0.51	0.00	**0.95**
WV	0.81%	1.97%	0.00%	**2.78%**	0.16	0.75	0.00	**0.91**
WY	0.88%	1.82%	0.00%	**2.70%**	-0.02	0.24	0.00	**0.22**
U.S.	**2.16%**	**8.73%**	**0.00%**	**10.90%**	**-0.03**	**0.70**	**0.00**	**0.67**

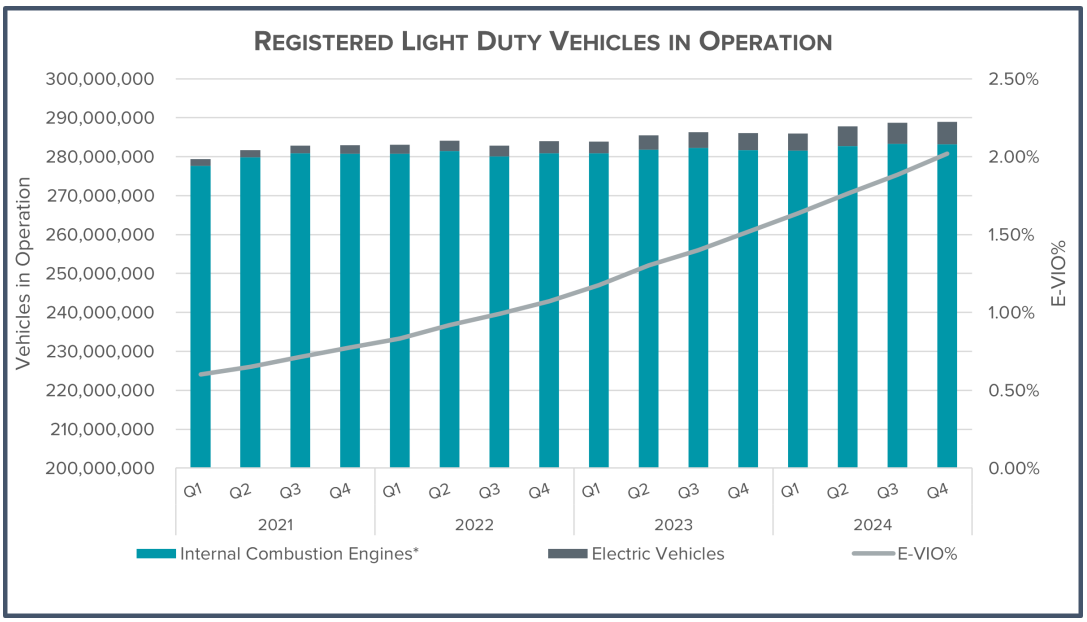
*Denotes states that have adopted California's ACC II ZEV mandate
Source: Figures compiled by Alliance for Automotive Innovation with new registrations for retail and fleet data provided by S&P Global Mobility covering January 1 – September 30, 2023, and January 1 – December 31, 2024

2024 (Full Year) New Light-Duty Vehicle Registrations By Powertrain					Change In Market Share (2024 vs 2023 Full Year), 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	0.71%	2.68%	0.00%	**3.39%**	-0.08%	-0.11%	0.00%	**-0.2%**
AL	0.63%	2.63%	0.00%	**3.26%**	-0.02%	-0.68%	0.00%	**0.7%**
AR	0.55%	2.10%	0.00%	**2.65%**	-0.02%	-0.37%	0.00%	**0.4%**
AZ	1.38%	8.00%	0.00%	**9.38%**	-0.14%	0.15%	0.00%	**0.0%**
CA*	3.58%	22.53%	0.04%	**26.15%**	-0.13%	-0.45%	0.13%	**0.44%**
CO*	5.81%	16.79%	0.00%	**22.59%**	-1.58%	-5.88%	0.00%	**7.5%**
CT	3.97%	7.51%	0.00%	**11.48%**	-0.52%	-0.77%	0.00%	**1.3%**
DC	5.29%	14.62%	0.00%	**19.90%**	-1.24%	0.97%	0.00%	**0.27%**
DE*	2.33%	8.19%	0.00%	**10.52%**	-0.17%	-1.57%	0.00%	**1.74%**
FL	1.32%	7.99%	0.00%	**9.31%**	-0.40%	-1.48%	0.00%	**1.9%**
GA	0.98%	6.71%	0.00%	**7.69%**	-0.14%	-0.17%	0.00%	**0.3%**
HI	3.84%	9.81%	0.00%	**13.66%**	-2.59%	-0.06%	0.00%	**2.64%**
IA	1.05%	2.70%	0.00%	**3.75%**	-0.18%	-0.42%	0.00%	**0.6%**
ID	1.40%	3.67%	0.00%	**5.07%**	-0.01%	-0.32%	0.00%	**0.3%**
IL	1.54%	6.22%	0.00%	**7.76%**	-0.26%	0.30%	0.00%	**0.0%**
IN	1.09%	4.00%	0.00%	**5.09%**	-0.14%	-0.82%	0.00%	**1.0%**
KS	1.14%	3.82%	0.00%	**4.96%**	-0.11%	-0.06%	0.00%	**0.2%**
KY	0.81%	3.04%	0.00%	**3.85%**	-0.05%	-0.47%	0.00%	**0.5%**
LA	0.50%	1.65%	0.00%	**2.15%**	0.04%	-0.21%	0.00%	**0.2%**
MA*	3.83%	8.45%	0.00%	**12.29%**	0.13%	-0.37%	0.00%	**0.25%**
MD*	2.73%	9.33%	0.00%	**12.06%**	0.21%	-0.57%	0.00%	**0.4%**
ME	3.09%	3.83%	0.00%	**6.93%**	-0.28%	-0.59%	0.00%	**0.9%**
MI	1.15%	5.11%	0.00%	**6.26%**	-0.18%	-2.08%	0.00%	**2.3%**
MN	1.91%	5.34%	0.00%	**7.25%**	-0.50%	-0.38%	0.00%	**0.9%**
MO	2.03%	3.75%	0.00%	**5.78%**	0.40%	-0.23%	0.00%	**-0.2%**
MS	0.40%	1.50%	0.00%	**1.90%**	0.09%	-0.45%	0.00%	**0.4%**
MT	1.46%	2.69%	0.00%	**4.15%**	-0.28%	-0.47%	0.00%	**0.8%**
NC	1.26%	6.10%	0.00%	**7.36%**	-0.18%	-0.16%	0.00%	**0.3%**
ND	0.53%	1.28%	0.00%	**1.81%**	-0.01%	-0.52%	0.00%	**0.5%**
NE	1.33%	3.22%	0.00%	**4.55%**	-0.16%	-0.67%	0.00%	**0.8%**
NH	2.31%	3.59%	0.00%	**5.90%**	-0.59%	-0.40%	0.00%	**1.0%**
NJ*	2.93%	11.12%	0.00%	**14.05%**	-0.20%	-0.26%	0.00%	**0.46%**
NM*	1.16%	3.98%	0.00%	**5.14%**	0.00%	-0.25%	0.00%	**0.2%**
NV	1.81%	13.22%	0.00%	**15.02%**	-0.13%	-1.66%	0.00%	**1.79%**
NY*	3.99%	6.16%	0.00%	**10.15%**	-0.50%	-0.59%	0.00%	**1.1%**
OH	1.21%	4.02%	0.00%	**5.23%**	-0.10%	-0.91%	0.00%	**1.0%**
OK	2.71%	0.99%	0.00%	**3.70%**	0.33%	0.71%	0.00%	**-1.0%**
OR*	4.21%	11.84%	0.00%	**16.05%**	-0.55%	-0.09%	0.00%	**0.63%**
PA	2.40%	4.60%	0.00%	**7.00%**	-0.26%	-0.40%	0.00%	**0.7%**
RI*	3.30%	5.21%	0.00%	**8.50%**	0.06%	-0.81%	0.00%	**0.7%**
SC	1.07%	3.28%	0.00%	**4.35%**	-0.23%	-0.23%	0.00%	**0.5%**
SD	1.06%	1.66%	0.00%	**2.71%**	-0.19%	-0.40%	0.00%	**0.6%**
TN	0.70%	4.35%	0.00%	**5.05%**	-0.05%	-0.12%	0.00%	**0.2%**
TX	0.86%	5.62%	0.00%	**6.48%**	-0.14%	-0.13%	0.00%	**0.3%**
UT	1.69%	7.70%	0.00%	**9.39%**	-0.07%	-0.59%	0.00%	**0.7%**
VA	1.76%	7.59%	0.00%	**9.34%**	-0.37%	0.76%	0.00%	**-0.4%**
VT*	4.10%	8.09%	0.00%	**12.19%**	-0.48%	-1.39%	0.00%	**1.9%**
WA*	3.22%	17.78%	0.00%	**21.00%**	-0.21%	-2.01%	0.00%	**2.22%**
WI	1.07%	3.73%	0.00%	**4.80%**	-0.15%	-0.40%	0.00%	**0.5%**
WV	0.73%	1.57%	0.00%	**2.29%**	-0.09%	-0.43%	0.00%	**0.5%**
WY	0.93%	1.84%	0.00%	**2.77%**	-0.10%	-0.56%	0.00%	**0.7%**
U.S.	**2.08%**	**8.14%**	**0.00%**	**10.22%**	**-0.20%**	**-0.51%**	**0.02%**	**0.70%**

*Denotes states that have adopted California's ACC II ZEV mandate
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, 2023, and January 1 – December 31, 2024

REGISTRATIONS AND CHARGING / REFUELING

Share of Registered EVs In U.S. Light-Duty Fleet Continues to Increase Incrementally – Tops 2 Percent for First Time. As sales of EVs increase, so does the total number of EVs operating on U.S. roads. There are now more than 5.8 million EVs in operation in the United States (2.02 percent of all light vehicles in operation). EVs represented more than 1 percent of total vehicles in operation (VIO) for the first time at the end of 2022. The electric vehicles in operation (E-VIO) of 2.02 percent is an increase of 0.5 pp since the fourth quarter of 2023 and more than three times the E-VIO from the first quarter in 2021 (0.60 percent).[5] The continued growth in E-VIO has implications for the number of chargers needed to support their operation.



U.S. Public Charging Infrastructure: Overview

While the U.S. Department of Energy notes that roughly 80 percent of all EV charging occurs at home[6], reliable and convenient access to workplace and public charging and refueling stations help to support customers who purchase EVs or are considering purchasing an EV. Workplace and public charging infrastructure not only eases perceived "range anxiety" concerns but also increases consumer awareness of the technology. In addition, achieving the EV market share envisioned by current state and federal regulations will require moving beyond customers who have access to charging via privately-owned single-family dwellings.

Here is a snapshot of publicly available EV charging and refueling infrastructure[7] available across the United States at the end of 2024[8]:

[5] Registered vehicles in operation compiled by Alliance for Automotive Innovation with data provided by S&P Global Mobility as of December 31, 2024
[6] Department of Energy, National EV Charging Network, Accessed 3/15/2025
[7] "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 denotes unique addresses.
[8] Charging information from U.S. Department of Energy Alternative Fuels Data Center, stations in operation as of December 31, 2024
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.

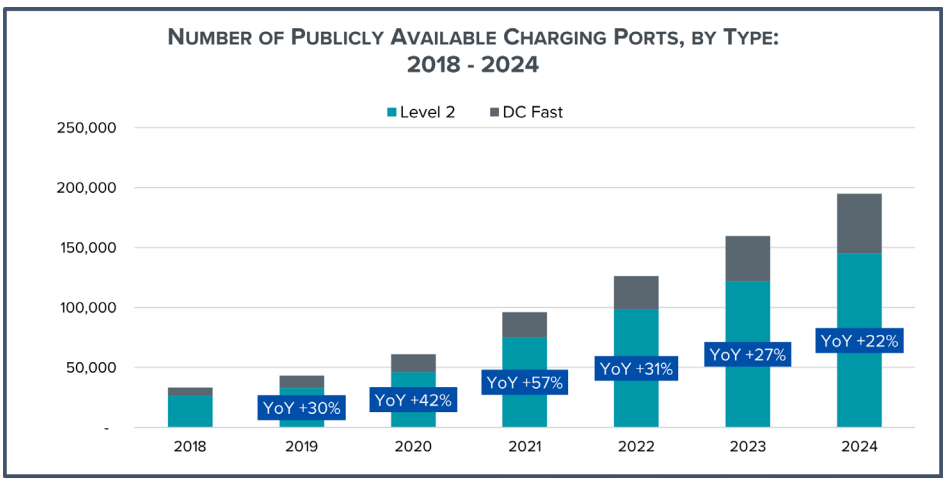
Level 2: 59,104 Locations, 145,019 EVSE Ports
DC Fast: 11,747 Locations, 49,748 EVSE Ports
Hydrogen Refueling: 58 Stations (57 are in California)
U.S. Total: *69,522*[9] *Locations, 194,767 EVSE Ports*
See Recommended Attributes for EV Charging Stations

State	Locations	L2 Ports	DC Fast Ports	State	Locations	L2 Ports	DC Fast Ports
AK	62	104	32	MT	135	204	234
AL	364	705	657	NC	1,363	3,414	1,324
AR	295	734	172	ND	84	120	116
AZ	966	2,878	1,116	NE	231	409	200
CA*	9,116	35,799	12,979	NH	216	443	258
CO*	1,681	4,479	1,103	NJ*	1,121	3,060	1,420
CT	997	2,909	564	NM*	261	461	338
DC	255	1,010	62	NV	435	1,481	851
DE*	180	372	258	NY*	3,484	13,854	1,985
FL	2,877	8,124	2,958	OH	1,373	3,167	1,094
GA	1,434	4,268	1,399	OK	339	582	951
HI	274	695	111	OR*	1,135	2,557	977
IA	364	605	411	PA	1,418	3,646	1,244
ID	182	338	182	RI*	212	691	120
IL	1,124	2,701	1,295	SC	490	1,066	525
IN	523	1,046	743	SD	108	173	145
KS	327	900	253	TN	684	1,646	745
KY	307	655	309	TX	2,777	7,408	3,216
LA	228	483	287	UT	614	2,048	497
MA*	1,990	7,348	1,052	VA	1,217	3,566	1,297
MD*	1,294	3,486	1,005	VT*	365	913	200
ME	422	873	282	WA*	1,553	4,942	1,462
MI	1,186	2,752	979	WI	584	1,097	624
MN	748	1,699	675	WV	139	306	157
MO	743	2,346	606	WY	94	143	128
MS	159	313	150	**US. Total**	48,530	145,019	49,748

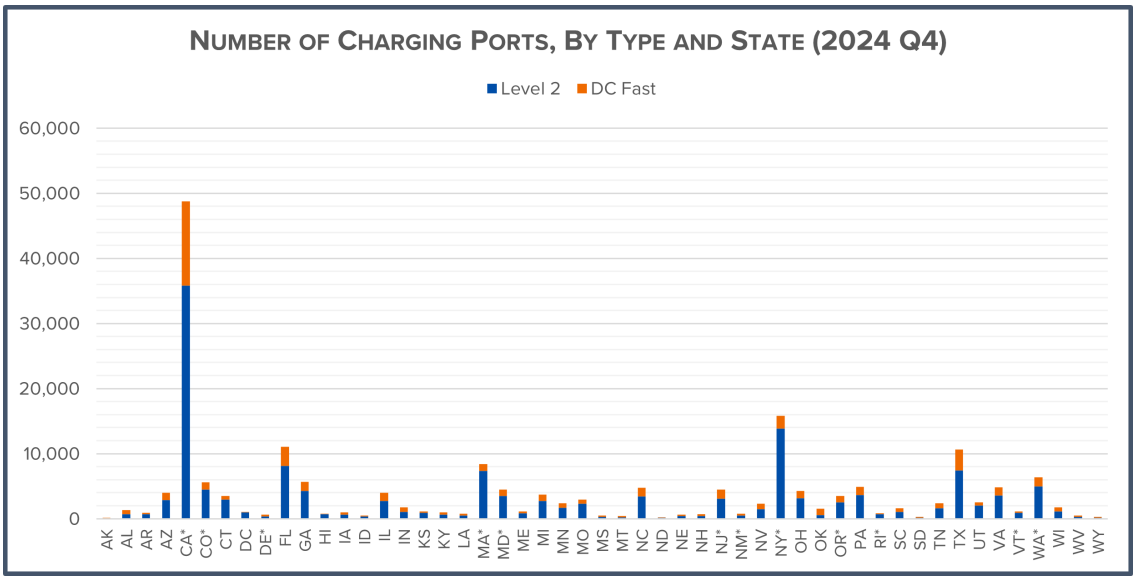
**Denotes states that have adopted California's ACC II ZEV mandate*

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.

The number of public Level 2 chargers increased by 19 percent in 2024 over 2023. DC Fast chargers increased 31 percent. Total charging ports increased 22 percent from the end of 2023. (For context, E-VIO increased 34 percent from the end of 2023 to the end of 2024.) Effectively, this ratio is going in the wrong direction since sales of EVs are increasing faster than the growth of public charging – which can be a hinderance to public acceptance and convenience for vehicle owners.



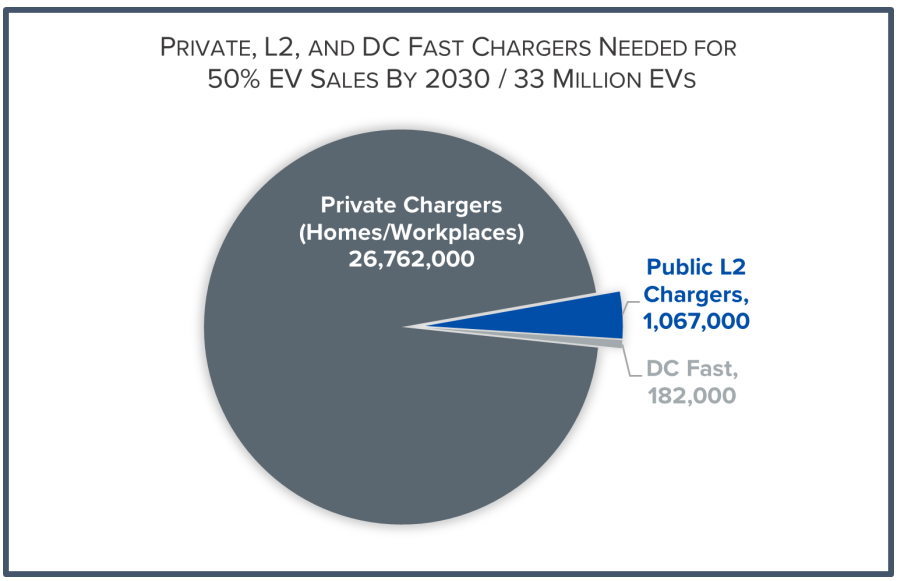
[9] Some station locations have both Level 2 and DC Fast installed.
[10] Charging information from U.S. Department of Energy Alternative Fuels Data Center, stations in operation as of 9/30/2024



[11]

Infrastructure Investment Necessary

An assessment by the U.S. National Renewable Energy Laboratory (NREL) released in June 2023 estimated that a network of 28 million charging ports would be necessary to support 50 percent EV sales by 2030 (and 33 million EVs on the road). NREL estimates that 96 percent of those charging ports would be privately accessible L1 and L2 chargers located at single-family homes, multifamily properties, and workplaces. The remaining 4 percent (1,249,000 ports) would be split between public L2 and high-speed DC Fast charging ports, with L2 making up 85 percent of those public chargers.

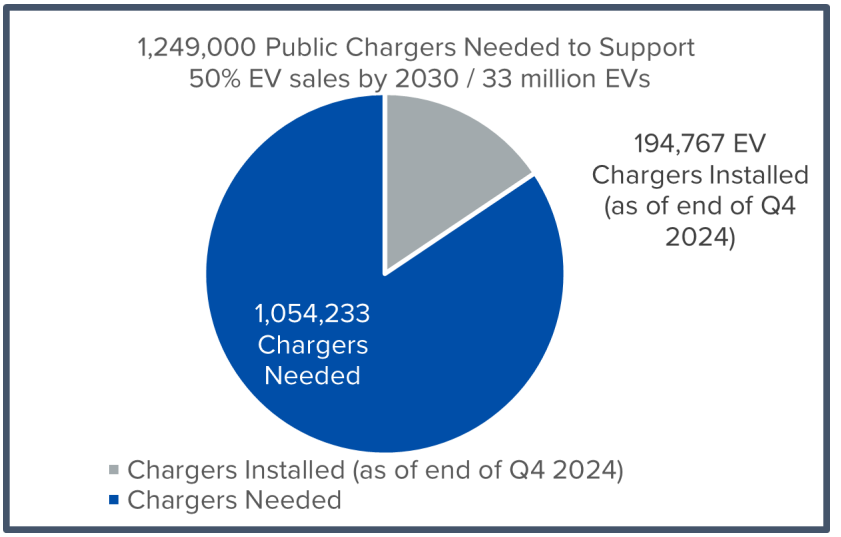


[13]

At the end of 2024, there were about 195,000 public charging ports across the country and 5.8 million EVs on the road. Total installed public charging ports are about 16 percent of the estimated chargers needed to support 50% EV sales and 33 million EVs in operation by 2030.

More than 1 million additional public chargers (921,981 L2 and 132,252 DC Fast) will need to be installed if the U.S. were to have 33 million EVs in operation by 2030. This means that between the end of 2024 and December 31, 2030, 481 chargers would need to be installed every day, for the next 6 years. Or 3 chargers every 10 minutes through the end of 2030.

[11] Charging information from U.S. Department of Energy Alternative Fuels Data Center, stations in operation as of 12/31/2024; *Denotes states that have adopted California's ACC II ZEV mandate
[12] National Renewable Energy Laboratory, "The 2030 National Charging Network: Estimating U.S. Light-Duty Demand for Electric Vehicle Charging Infrastructure," June 2023
[13] National Renewable Energy Laboratory, "The 2030 National Charging Network: Estimating U.S. Light-Duty Demand for Electric Vehicle Charging Infrastructure," June 2023



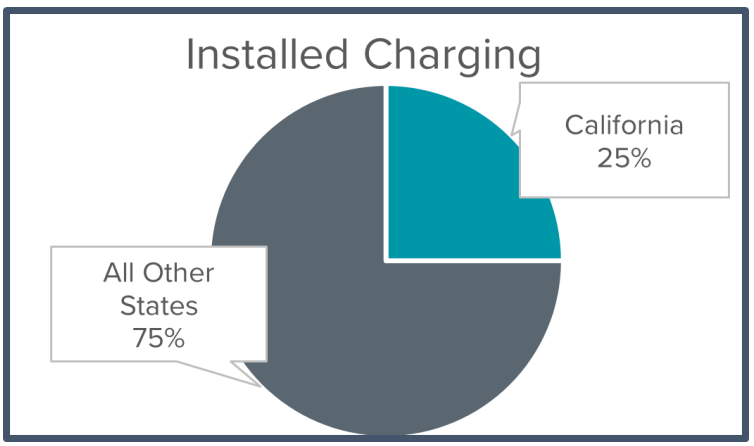
Between the end of 2024 and December 31, 2030, 481 chargers need to be installed every day, for the next 6 years. Or 3 chargers every 10 minutes through the end of 2030.

The Cost of This Substantial Infrastructure Necessity Will Largely Fall on Consumers and Commercial Real Estate Owners as They Install Home and Workplace Charging. According to NREL,[14] a national capital investment of $53–$127 billion in charging infrastructure is needed by 2030 (including as much as $72 billion for private residential charging) to support 33 million EVs. The large range of potential costs is a result of variable and evolving equipment and installation costs across charging networks, locations, and site designs[15]. Notably, the estimates exclude the cost of grid upgrades and distributed energy resources. The estimated cumulative capital investment includes[16]:

- $22–$72 billion for privately accessible Level 1 and Level 2 charging ports
- $27–$44 billion for publicly accessible fast charging ports
- $5–$11 billion for publicly accessible Level 2 charging ports

Infrastructure Disparities by Geography

Geographic disparities in charging infrastructure are pervasive. At the end of 2024, a quarter of all public charging infrastructure was in California, which had 33 percent of all registered EVs.



Alliance for Automotive Innovation participates in EV policy via the Electric Vehicle Working Group, through the development of a lithium-ion battery recycling policy framework, recommendations for attributes of EV charging stations and on the continuation of EV tax credits and incentives[17] that support a U.S. jobs and a healthy, globally competitive auto industry in America.

[14] National Renewable Energy Laboratory, "The 2030 National Charging Network: Estimating U.S. Light-Duty Demand for Electric Vehicle Charging Infrastructure," June 2023
[15] Various state and federal incentives are available to consumers or businesses that install EV charging infrastructure, including from power utilities.
[16] National Renewable Energy Laboratory, "The 2030 National Charging Network: Estimating U.S. Light-Duty Demand for Electric Vehicle Charging Infrastructure," June 2023
[17] Alliance for Automotive Innovation, Blog, What We Know (and Don't Know) About the New EV Tax Credit Rules, 12/20/2022; Alliance for Automotive Innovation, blog Foreign Entity of Concern: Finally... Some Clarity, 12/1/2023

Vehicles in Operation and Charging by State

Public Charging Outlets And Registerd EVs (as of 12/31/2024)								
	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	104	32	-	136	0.73%	0.07%	32	59.09
AL	705	657	-	1,362	0.44%	0.39%	17	44.52
AR	734	172	-	906	0.42%	0.21%	13	39.65
AZ	2,878	1,116	-	3,994	2.07%	2.46%	36	192.63
CA*	35,799	12,979	56	48,834	6.12%	32.82%	39	491.09
CO*	4,479	1,103	-	5,582	3.09%	2.93%	31	290.76
CT	2,909	564	-	3,473	1.96%	1.04%	17	167.72
DC	1,010	62	-	1,072	4.24%	0.25%	13	211.01
DE*	372	258	-	630	1.73%	0.27%	25	153.59
FL	8,124	2,958	-	11,082	2.03%	6.79%	36	174.99
GA	4,268	1,399	-	5,667	1.42%	2.35%	24	124.10
HI	695	111	1	807	3.36%	0.65%	47	264.55
IA	605	411	-	1,016	0.56%	0.31%	18	56.84
ID	338	182	-	520	0.83%	0.29%	32	85.99
IL	2,701	1,295	-	3,996	1.58%	2.77%	40	128.81
IN	1,046	743	-	1,789	0.77%	0.82%	27	69.45
KS	900	253	-	1,153	0.71%	0.36%	18	71.97
KY	655	309	-	964	0.52%	0.36%	22	46.19
LA	483	287	-	770	0.40%	0.26%	20	33.08
MA*	7,348	1,052	-	8,400	2.56%	2.46%	17	204.80
MD*	3,486	1,005	-	4,491	2.50%	2.19%	28	206.74
ME	873	282	-	1,155	1.40%	0.32%	16	135.20
MI	2,752	979	-	3,731	1.09%	1.61%	25	93.25
MN	1,699	675	-	2,374	1.25%	1.12%	28	114.29
MO	2,346	606	-	2,952	0.82%	0.81%	16	76.06
MS	313	150	-	463	0.21%	0.10%	13	20.57
MT	204	234	-	438	0.50%	0.15%	20	78.19
NC	3,414	1,324	-	4,738	1.22%	2.04%	25	109.57
ND	120	116	-	236	0.26%	0.04%	9	27.34
NE	409	200	-	609	0.63%	0.23%	22	68.04
NH	443	258	-	701	1.42%	0.33%	27	136.86
NJ*	3,060	1,420	-	4,480	2.84%	3.67%	48	230.48
NM*	461	338	-	799	0.90%	0.32%	23	86.93
NV	1,481	851	-	2,332	3.00%	1.31%	33	239.18
NY*	13,854	1,985	-	15,839	2.34%	4.59%	17	136.62
OH	3,167	1,094	-	4,261	0.90%	1.66%	23	82.25
OK	582	951	-	1,533	1.28%	1.02%	39	146.04
OR*	2,557	977	-	3,534	2.82%	1.88%	31	259.31
PA	3,646	1,244	-	4,890	1.25%	2.37%	28	106.42
RI*	691	120	-	811	1.58%	0.22%	16	116.71
SC	1,066	525	-	1,591	0.66%	0.62%	23	67.29
SD	173	145	-	318	0.37%	0.06%	12	40.28
TN	1,646	745	-	2,391	0.81%	0.97%	24	79.23
TX	7,408	3,216	-	10,624	1.39%	5.93%	33	113.42
UT	2,048	497	-	2,545	2.11%	1.12%	26	191.59
VA	3,566	1,297	-	4,863	1.68%	2.23%	27	149.42
VT*	913	200	-	1,113	3.02%	0.29%	15	258.05
WA*	4,942	1,462	-	6,404	3.36%	4.03%	37	300.67
WI	1,097	624	-	1,721	0.83%	0.78%	26	76.56
WV	306	157	-	463	0.36%	0.10%	12	32.25
WY	143	128	-	271	0.37%	0.04%	9	42.12
U.S.	**145,019**	**49,748**	**57**	**194,824**	**2.02%**	**100.00%**	**30**	**174.09**

*Denotes states that have adopted California's ZEV program; **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 December 31, 2024; Charging information from U.S. Department of Energy Alternative Fuels Data Center, as of 12/31/2024

REGISTRATIONS

EV registrations as a share of all registered light-duty vehicles are 2.0 percent (as of December 31, 2024). There are nearly 289 million registered light-duty vehicles in the U.S.

At the end of 2024, California accounted for 33 percent of all registered light-duty EVs in the U.S.

States with highest portion of total EVs registered:

1) CA* (1,913,541, 6.12%)

2) DC (14,327, 4.24%)

3) WA* (234,913, 3.36%)

4) HI (37,967, 3.36%)

5) CO* (170,895, 3.09%)

6) VT* (16,708, 3.02%)

7) NV (76,399, 3%)

8) NJ* (214,137, 2.84%)

9) OR* (109,775, 2.82%)

10) MA* (143,392, 2.56%)

States with worst ratio of registered EVs per public charger:

1) NJ*

2) HI

3) IL

4) CA*

5) OK

6) WA*

7) AZ

8) FL

9) NV

10) TX

Read more about automakers plans for ***Electric Vehicles Here***

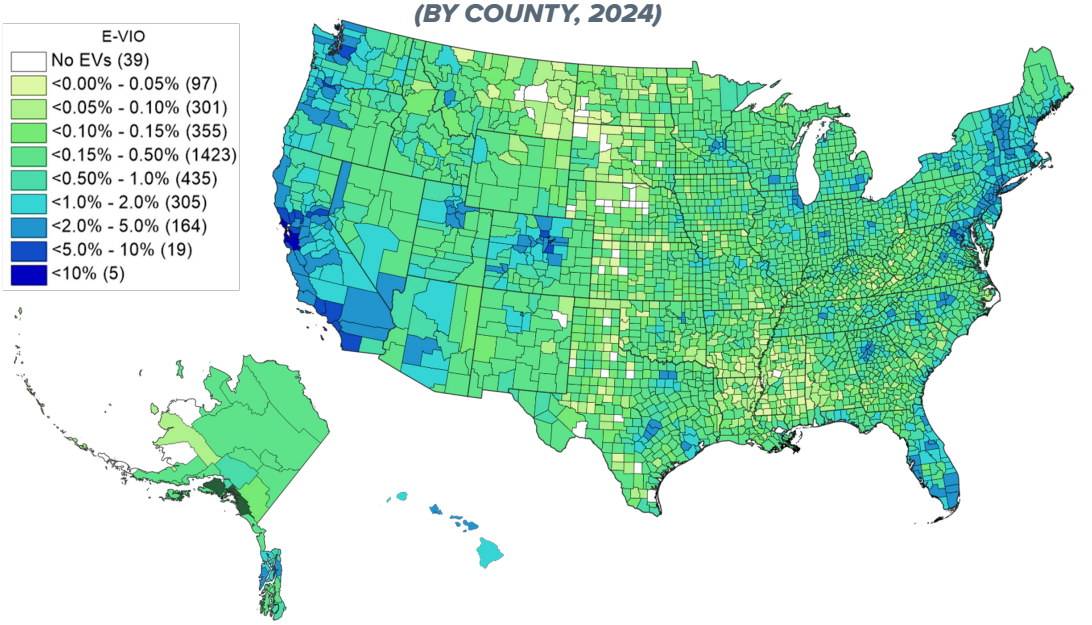
SPOTLIGHT ON: GEOGRAPHIC DISTRIBUTION OF EVs, INFRASTRUCTURE AND POLICY IMPLICATIONS

Electric Vehicle Registrations by County

There are 3,144 counties and independent districts in the United States with more than 288 million vehicles in operation (VIO) – 5.8 million of which are electric (2 percent). While it stands to reason that more populous states and counties would be home to more vehicles, the uptake of EVs does not follow the same pattern. For instance, California is home to nearly 11 percent of U.S. vehicles, but accounts for 33 percent of all electric vehicle registrations. By contrast, Texas, the state with the second highest number of registered vehicles represents 8.6 percent of total U.S. VIO but only 5.9 percent of electric vehicles in the country.

Half of all registered EVs are located within just 41 counties (1.3 percent of counties), while 39 counties have zero registered EVs. Only 493 counties (16 percent) have an Electric Vehicle in Operation (E-VIO) rate greater than 1 percent; 188 counties have an E-VIO rate greater than 2 percent.

ELECTRIC VEHICLE REGISTRATIONS AS A PERCENT OF TOTAL VEHICLES IN OPPERATION (BY COUNTY, 2024)



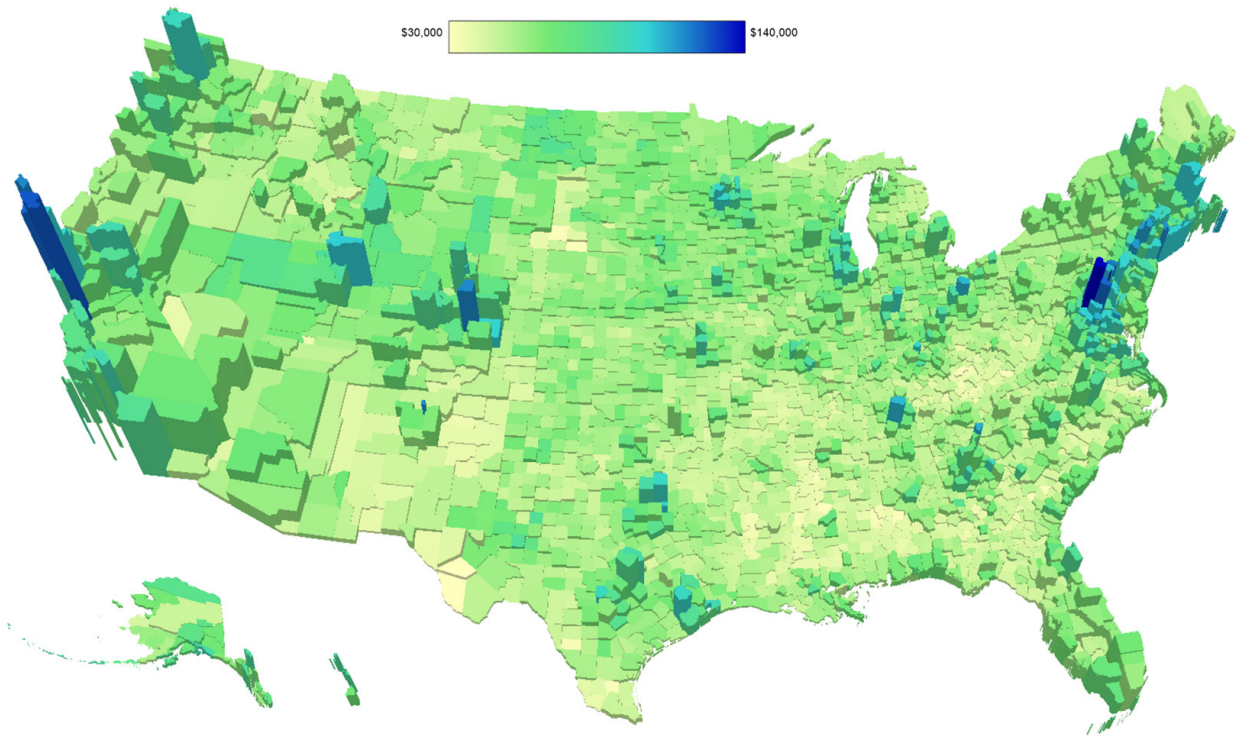
Counties with the Highest Rate of E-VIO

RANK	STATE	COUNTY	EV%VIO	RANK	STATE	COUNTY	EV%VIO
1	CALIFORNIA	SANTA CLARA	12.52%	6	CALIFORNIA	ORANGE	8.75%
2	CALIFORNIA	MARIN	11.65%	7	CALIFORNIA	CONTRA COSTA	7.98%
3	CALIFORNIA	SAN FRANCISCO	11.21%	8	COLORADO	BOULDER	7.11%
4	CALIFORNIA	SAN MATEO	11.12%	9	CALIFORNIA	LOS ANGELES	6.83%
5	CALIFORNIA	ALAMEDA	10.61%	10	WASHINGTON	KING	6.80%

Registrations of EVs tend to be highest in wealthier counties. The counties with the highest EV registration rates (top 10 percent | 314 counties), are also some of the wealthiest – more than half (55 percent) are in the top ten percent for median household income. The average median household income for the top ten percent of E-VIO counties is $78,259. Conversely, for the counties with the lowest percent of EVs of county VIO, the average median income is $45,525.

ELECTRIC VEHICLE REGISTRATIONS AS A PERCENT OF TOTAL VIO AND MEDIAN HOUSEHOLD INCOME

(Height represents percent of EV VIO and color represents median household income)



Geographic Distribution of Charging Infrastructure

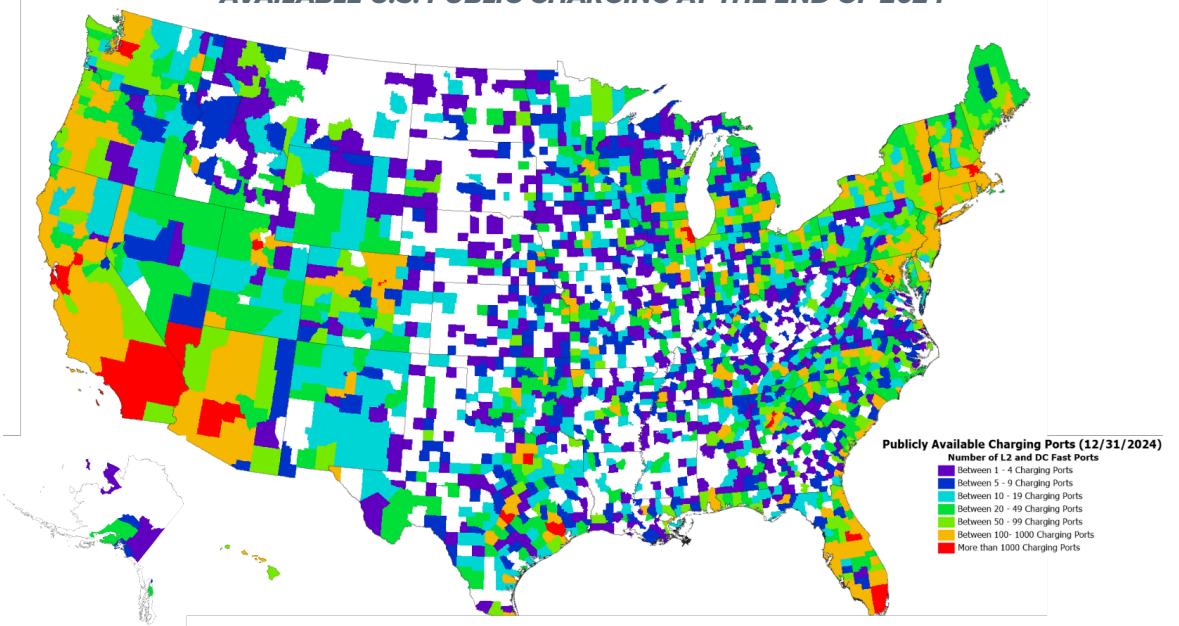
At the end of 2024, there were about 195,000 public charging ports across the country and 5.8 million EVs on the road, a ratio of 30 EVs per charger. While progress has been made installing public charging across the country, disparities persist. At the end of 2023, 31 percent of all U.S. counties had zero chargers installed – at the end of 2024, that number was 27 percent (854 counties with NO public charging).

Counties with five or fewer charging ports account for 41% of all counties. That number is an improvement from 2023's 53 percent.

The top 25 counties with the most public charging ports installed accounted for nearly one-third of all available U.S.
Charging (61,569 ports).

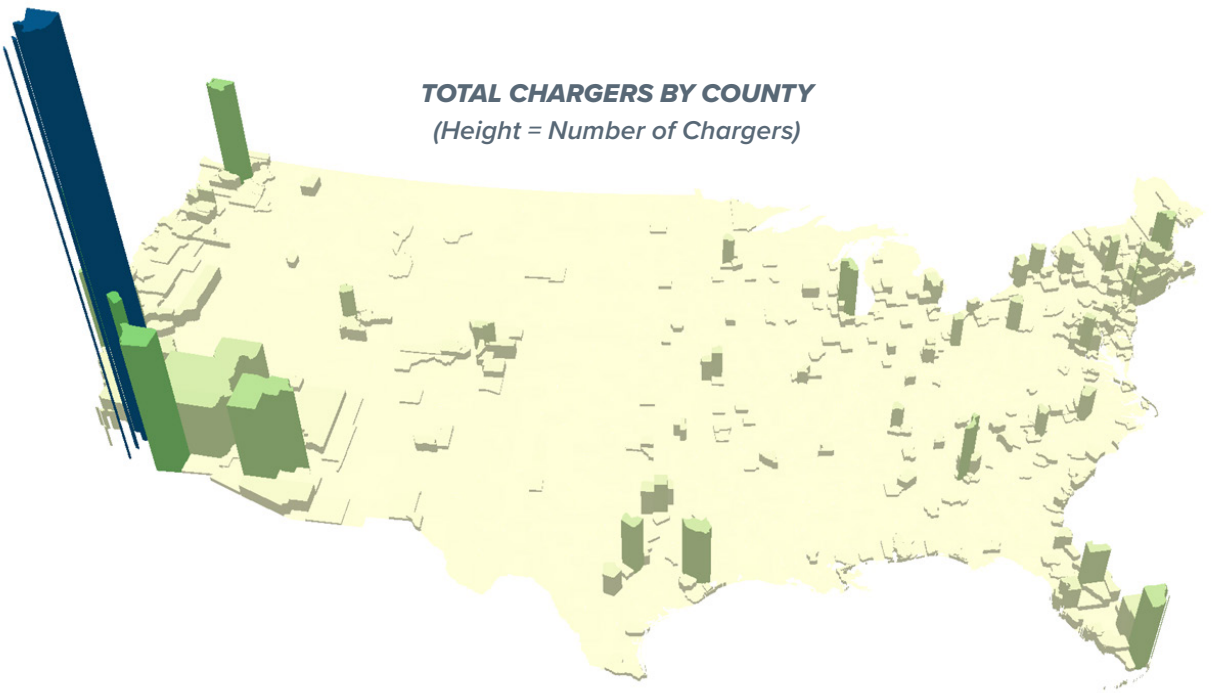
At the end of 2024, 44 percent of counties had NO DC Fast charging installed; 6 percent of counties had access to only 1 port. California is home to 26 percent of all DC Fast ports.

AVAILABLE U.S. PUBLIC CHARGING AT THE END OF 2024



TOTAL CHARGERS BY COUNTY

(Height = Number of Chargers)



Top 10 Counties with the Most Charging Ports

RANK	STATE	COUNTY	CHARGERS	RANK	STATE	COUNTY	CHARGERS
1	CALIFORNIA	LOS ANGELES	11,457	6	CALIFORNIA	SAN MATEO	2,723
2	CALIFORNIA	SANTA CLARA	5,139	7	ARIZONA	MARICOPA	2,636
3	CALIFORNIA	ORANGE	4,654	8	CALIFORNIA	ALAMEDA	2,420
4	CALIFORNIA	SAN DIEGO	4,049	9	FLORIDA	MIAMI-DADE	2,117
5	WASHINGTON	KING	3,208	10	NEW YORK	NEW YORK	1,993

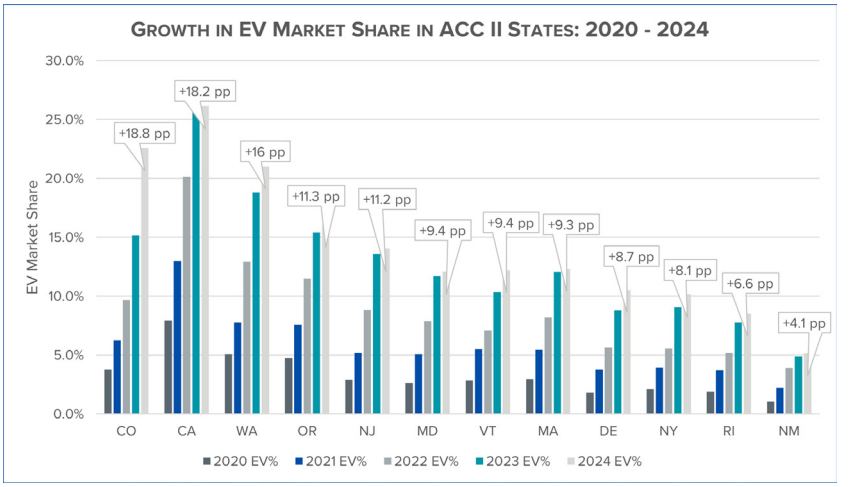
POWERED BY:

Incentives, Policy, and EV Adoption Growth

As evidenced above, EV adoption rates vary across the U.S. This is due to a combination of factors including state policies and incentives, economic factors, infrastructure availability, and consumer preferences. The states leading in EV adoption—such as California, Washington, and Colorado—tend to have policies and infrastructure that make EV ownership more practical and appealing.

States looking to accelerate consumer adoption of electric vehicles, particularly states that follow California's Advanced Clean Cars II (ACC II) regulations (which will require compliance with escalating zero emission vehicle mandates)[18], can make purchasing an EV more appealing by providing financial incentives that lower the price barrier. Lowering the cost of an EV can make purchasing one accessible to more consumers, including low- and middle-income buyers.

Although some ACC II adopting states have had success increasing EV market share a great deal, many of those states have not. While California continues to lead in EV market share for 2024, the state with the greatest increase in market share since 2020 is Colorado – increasing by nearly 19 percentage points. New Mexico gained the least EV market share, increasing only 4 percentage points. For the U.S. in that period, the average market share increase was 8 percentage points. Most of the ACC II states are below or just above the national average, and a far way off from looming mandates.



Many states have passed EV incentive laws, but not all states fully fund those incentives, limiting their effectiveness. Some states only partially fund incentive programs, capping the program after a limit has been reached for the year. Some states do not fund their program at all.

An analysis of state programs, utilizing data provided by SBD Automotive, indicates only twelve states either partially fund or fully fund financial incentives for the purchase of an EV.

State	Funding	Title
CA	Full	Clean Cars 4 All
CA	Full	Driving Clean Assistance Program
CO	Partial	Electric Vehicle (EV) and Hydrogen Fuel Cell Electric Vehicle (FCEV) Tax Credit
CO	Partial	Vehicle Exchange Colorado
CT	Partial	Hydrogen Fuel Cell Electric Vehicle (FCEV) and Electric Vehicle (EV) Rebate
DE	Partial	Clean Vehicle Rebate Program
IL	Partial	Electric Vehicle (EV) Rebates
MA	Partial	MOR-EV
MD	Partial	Electric Vehicle (EV) and Fuel Cell Electric Vehicle (FCEV) Tax Credit
NM	Full	Clean Vehicle Tax Credit
NY	Partial	Electric Vehicle (EV) Rebate Program
PA	Full	Alternative Fuel Vehicle (AFV) Rebate
RI	Full	Zero Emission Vehicle (ZEV) and Plug-In Hybrid Electric Vehicle (PHEV) Rebates
WA	Full	Low-Income Electric Vehicle (EV) Rebates

[18] See more on ACC II states and challenges in Get Connected for Q3, 2024

ACC II States need to help enable rapidly increasing market share if automakers are to meet looming mandates without constraining overall vehicle sales. While nine of the 12 states either fund or partially fund incentives, the amount varies and may also come with income limit requirements:

ACC II State Tax Credit/Rebate Incentives

State	Funding Level	Title	Incentive	Enacted Date	Amended Date
CA	Full	Clean Cars 4 All	PHEV: $9,500 - $11,00 (based on income) Plus, up to $2,000 for charging equipment or pre-loaded charge card ZEV: $10,000 - $12,000 (based on income) Plus, up to $2,000 for charging equipment or pre-loaded charge card	2017	2022
CA	Full	Driving Clean Assistance Program	Expansion of Clean Cars 4 All to all areas of the state. See incentive amount above. Also provides access to 8% capped interest rate loans.	2022	
CO	Partial	Electric Vehicle (EV) and Hydrogen Fuel Cell Electric Vehicle (FCEV) Tax Credit	$3,500 EV/FCEV up to $80,000 MSRP + additional $2,500 for MSRP up to $35,000 (new vehicles)	6/6/2016	5/31/2019
CO	Partial	Vehicle Exchange Colorado	• New electric vehicle (BEV or PHEV): $6,000 Used electric vehicle (BEV or PHEV): $4,000	8/31/2023	-
DE	Partial	Clean Vehicle Rebate Program	• Rebate Amounts as of May 1, 2024 New Battery Electric Vehicles with a base MSRP below $40,000 : $2,500 New Battery Electric Vehicles with a base MSRP between $40,000 and $50,000 : $1,500 New Plug-in Hybrid Vehicles with a base MSRP below $50,000 : $1,000 Used Battery Electric Vehicle with a fair market purchase price of $40,000 or less : $2,500 Used Plug-in Hybrid Vehicles with a fair market purchase price $40,000 or less : $1,000	8/3/2023	-
MA	Partial	MOR-EV	Up to: $3,500 purchase or lease of new ZEV + additional $1,500 if in eligible income-qualified state assistance program	3/1/2014	-
MD	Partial	Electric Vehicle (EV) and Fuel Cell Electric Vehicle (FCEV) Tax Credit	EV, FCEV: up to $3,000	5/20/2010	4/21/2022
NM	Full	Clean Vehicle Tax Credit	2024–2026 Value: New EV Credit: $3,000 New PHEV/Fuel Cell Credit: $2,500 Pre-Owned EV Credit: $2,500 Pre-Owned PHEV/Fuel Cell Credit: $2,000	1/1/2024	-
NY	Partial	Electric Vehicle (EV) Rebate Program	EVs: up to $2,000 new purchase or lease	4/12/2016	-
RI	Full	Zero Emission Vehicle (ZEV) and Plug-In Hybrid Electric Vehicle (PHEV) Rebates	• ZEV: $1,500 for a new vehicle; \$1,000 for a pre-owned vehicle • PHEV : \$1,000 for a new vehicle; \$750 for a pre-owned vehicle • + additional $1,500 for applicants participating in state or federal income-qualified program.	1/29/2015	-
WA	Full	Low-Income Electric Vehicle (EV) Rebates	EVs: up to $9,000 (new), $2,500 (used)	10/1/2024	-

Many states have imposed higher registration fees on EVs to make up for lost gas tax revenue, which, if not aligned with the existing gasoline tax, can make ownership more expensive compared to gasoline cars. There are currently 35 states that impose fees and road user taxes:

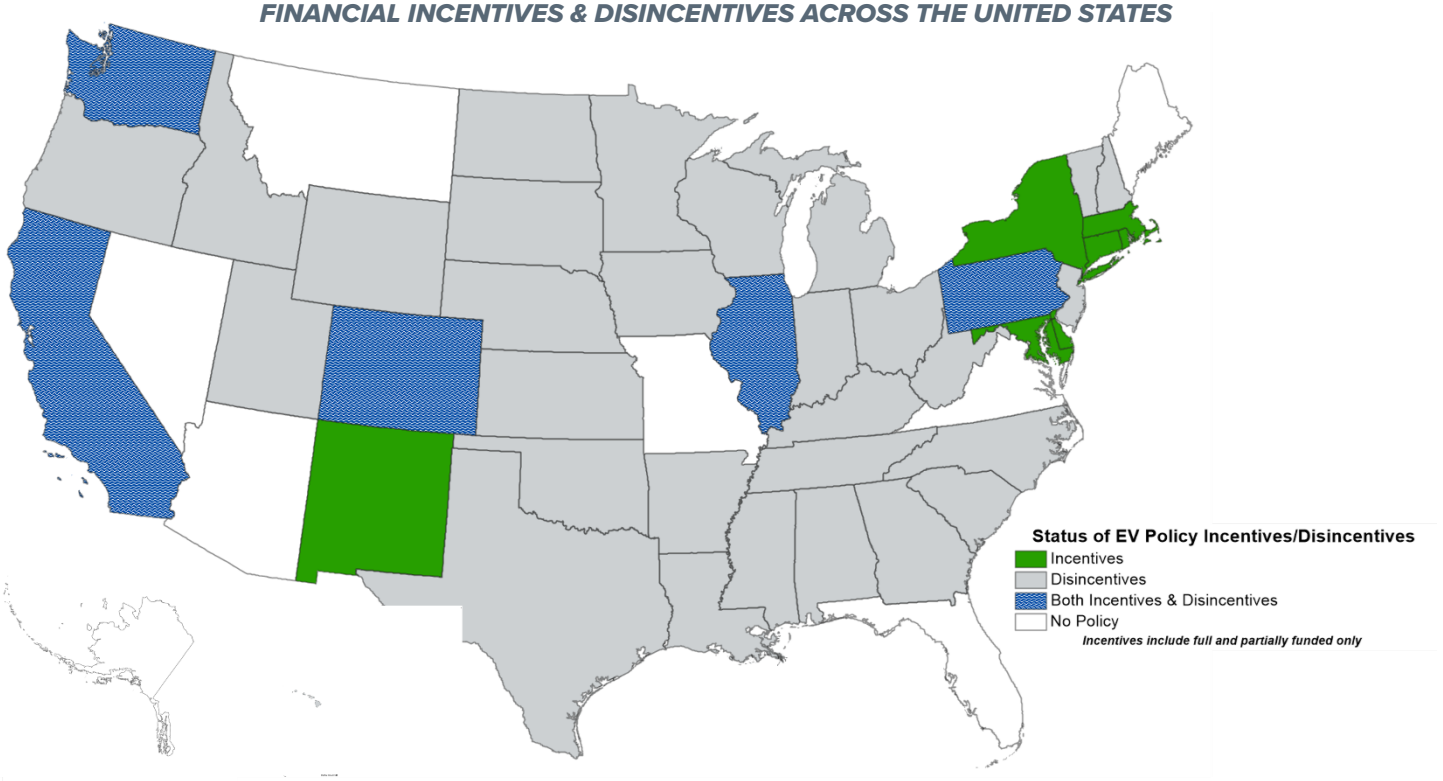
State Fees and Road User Taxes		
State	**Title**	**Value**
AL	**Electric Vehicle (EV) Fee**	$213 EV $113 PHEV + standard registration
AR	**Hybrid Electric Vehicle (HEV) and Electric Vehicle (EV) Fee**	$200 EV $100 PHEV $50 HEV + standard registration
CA	**Zero Emission Vehicle (ZEV) Fee**	$100 + standard registration
CO	**Electric Vehicle (EV) Fee**	2025-2026 \$16 EV \$11 PHEV + standard registration
GA	**Alternative Fuel Vehicle (AFV) Annual Fee**	(07/01/2024 - 06/30/2025): EVs and PHEVs/Flex Vehicles with AFV License Plate: $329.86 (commercial) / $219.84 non-commercial) + AFV License Plate fee: $25 manufacturing + $20 registration + $35 special tag (=$80)
HI	**Alternative Fuel Vehicle (AFV) Registration**	$50/year + standard registration
	Electric Vehicle (EV) Road Usage Charge Program	$0.08/mi up to $50/year usage fee w/ NO additional registration fee
	EV Registration Fee vs Usage Option	$0.08/mi up to $50/year if opting in to annual mileage-based road usage fee instead of EV/AFV registration fee
IA	**Alternative Fuel Tax**	Electricity will be subject to the excise tax of \$0.026 per kilowatt-hour of fuel delivered or placed into a battery or other energy storage device of an electric motor vehicle at any location in Iowa other than a residence
	Electric Vehicle (EV) Fee	EVs: $130 + standard registration PHEVs: $160 + standard registration
ID	**Electric Vehicle (EV) Fee**	EVs: $140 + standard registration PHEVs: $75 + standard registration
IL	**Battery Electric Vehicle (BEV) Fee**	$100 + standard registration
IN	**Electric Vehicle (EV) Registration Fee**	EVs: $221 + standard registration PHEVs, HEVs: $74 + standard registration
KS	**Electric Vehicle (EV) and Hybrid Electric Vehicle (HEV) Fees**	EVs: $100 PHEVs, HEVs: $50 in lieu of standard registration fees
KY	**Electric Vehicle (EV) Fee**	EVs, PHEVs: $126 + standard registration
LA	**Electric Vehicle (EV) Fee**	EVs: $110 + standard registration PHEVs: $60+ standard registration

State Fees and Road User Taxes		
State	**Title**	**Value**
MI	**Electric Vehicle (EV) Fee**	For 2025: EVs <8,000lbs: $160 + standard registration EVs > 8,000lbs: $260 + standard registration PHEVs <8,000lbs: $60 + standard registration PHEVs > 8,000lbs: $130 + standard registration
MN	**All-Electric Vehicle (EV) Fee**	EVs: $75 + standard registration
MS	**Electric Vehicle and Hybrid Electric Vehicle (HEV) Fees**	EVs: $150 + standard registration PHEVs, HEVs: $75 + standard registration
NC	**Electric Vehicle (EV) Annual Fee**	EVs: $214.50 + standard registration PHEVs: $107.25 + standard registration
ND	**Electric Vehicle (EV) Fee**	EVs: $120 + standard registration PHEVs: $50 + standard registration
NE	**Alternative Fuel Vehicle (AFV) Registration Fee**	EVs / AFVs: $150 + standard registration PHEVS: $75 + standard registration
NH	**Electric Vehicle (EV) Fee**	EVs: $100 + standard registration PHEVs: $50 + standard registration
NJ	**Zero Emission Vehicle (ZEV) Fee**	For 2025-2026: ZEVs: $260 + standard registration fees
OH	**Electric Vehicle (EV) Registration Fee**	EVs: $200 + standard registration PHEVs: $150 + standard registration HEVs: $100 + standard registration
OK	**Electric Vehicle (EV) and Plug-In Hybrid Electric Vehicle (PHEV) Fee**	6,000 pounds (lbs.) or below \$110 (EV) \$82 (PHEV) 6,001 lbs. to 10,000 lbs. \$158 (EV) \$118 (PHEV) 10,001 lbs. to 26,500 lbs. \$363 (EV) \$272 (PHEV) Greater than 26,501 lbs. \$2,250 (EV) \$1,687 (PHEV)
OR	**Electric Vehicle (EV) and Vehicle Efficiency Fees**	EVs: $115 flat rate or $0.02/mi road use fee via OReGO + standard registration PHEVs, HEVS: $20 (0-19mpg); $25 (20 - 39mpg); $35 (40mpg+) + standard registration EVs or PHEVs/HEVs rated over 40mpg exempt from additional registration fees if enrolled in OReGO
PA	**Electric Vehicle (EV) Fee**	EVs: $200 + standard registration PHEVs: $50 + standard registration
SC	**Alternative Fuel Vehicle Fee**	EVs, PHEVs, FCEVs: $120 + standard registration HEVs: $60 + standard registration
SD	**Electric Vehicle (EV) Fee**	EVs: $50 + standard registration
TN	**Electric Vehicle (EV) Fee**	2024 - 2026: Annual EV Fee: $200 2024 - 2028: Annual HEV and PHEV Fee: $100
TX	**Electric Vehicle (EV) Registration Fee**	EVs: $400 first time; $200 renewals

State Fees and Road User Taxes		
State	**Title**	**Value**
UT	**Alternative Fuel Vehicle Registration Fees**	EV \$138.50 + standard registration PHEV \$60.25 + standard registration HEV \$23.25 + standard registration OR Road Usage Charge
	Road Usage Charge Program	Year — Fee per Mile — Maximum Total Annual Fee 2023 to 2025 — \$0.0106 — \$138.50 2026 to 2032 — \$0.0125 — \$180
VT	**Electric Vehicle (EV) Fee**	EVs: \$89 (annual) or \$178 (biennial) + standard registration PHEVs: \$44.50 (annual) or \$89 (biennial) + standard registration
WA	**Electric Vehicle (EV) Fee**	EVs, PHEVs: \$150 + \$75 transportation electrification fee + standard registration HEVs: \$75 + \$30 transportation electrification fee + standard registration
WI	**Electric Vehicle (EV) Fees**	EVs: \$175 + standard registration PHEVs, HEVs: \$75 + standard registration
WV	**Alternative Fuel Vehicle Fee**	EVs, FCEVs: \$200 + standard registration PHEVs: \$100 + standard registration
WY	**Alternative Fuel Tax Rate**	EVs: \$0.24 per 33.56kwh
	Electric Vehicle (EV) Decal Fee	EVs: \$200

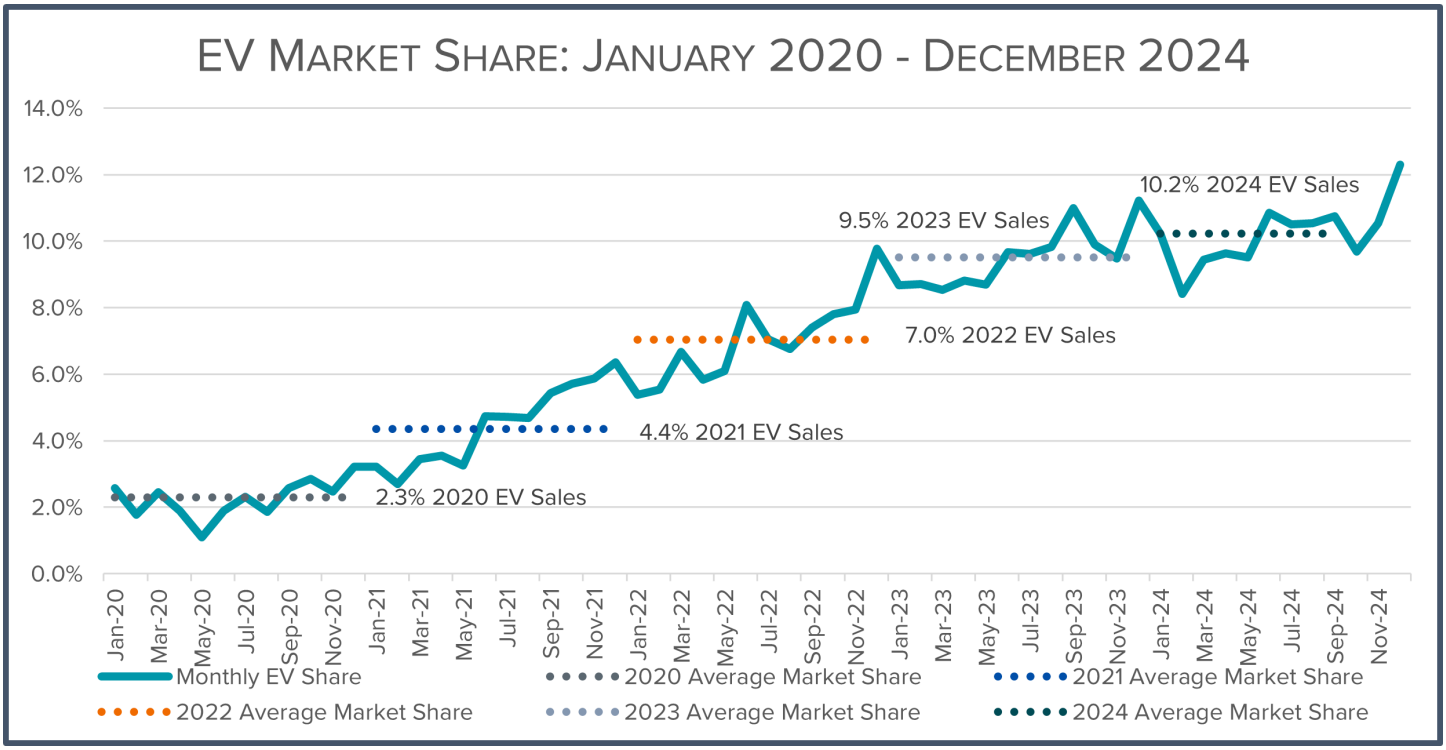
While twelve states provide incentives and 35 states charge registration and road user taxes, provide disincentives, there are five states that have both policies – possibly counteracting the effectiveness of the incentive:

FINANCIAL INCENTIVES & DISINCENTIVES ACROSS THE UNITED STATES



EV adoption is driven by affordability, convenience, and consumer confidence. When disincentives like higher costs and poor infrastructure exist, they make EVs less appealing. Addressing these barriers through better incentives, infrastructure expansion, and consumer education is crucial to accelerating the transition to electric transportation.

APPENDIX - A


EV Market Share: January 2020 - December 2024
14.0%
12.0%
10.0%
8.0%
6.0%
4.0%
2.0%
0.0%
2.3% 2020 EV Sales
4.4% 2021 EV Sales
7.0% 2022 EV Sales
9.5% 2023 EV Sales
10.2% 2024 EV Sales
Jan-20
Mar-20
May-20
Jul-20
Sep-20
Nov-20
Jan-21
Mar-21
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Sep-24
Nov-24
Monthly EV Share
2020 Average Market Share
2021 Average Market Share
2022 Average Market Share
2023 Average Market Share
2024 Average Market Share