Charging Analytics Program
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Industry Pulse Check

EV Fast Charging

United States 

Q1 2026

TRANSPORTATION ENERGY INSTITUTE

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United States

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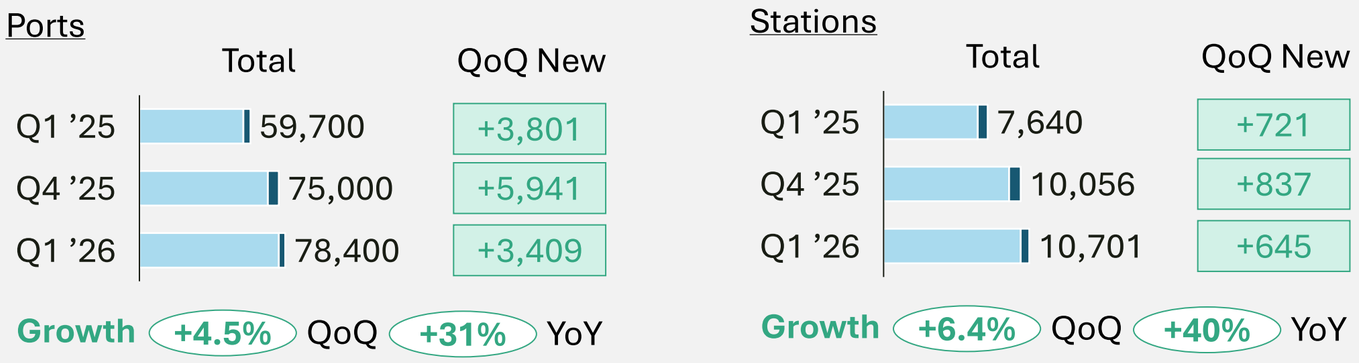
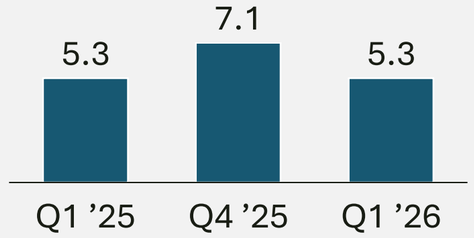
Source: TEI Charging Analytics Program (CAP) Analysis, Paren Data and various sources (e.g. Omdia, Argonne National Lab)

Infrastructure Growth (Ports and Stations)

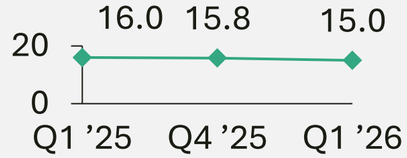


Site Scale / Efficiency

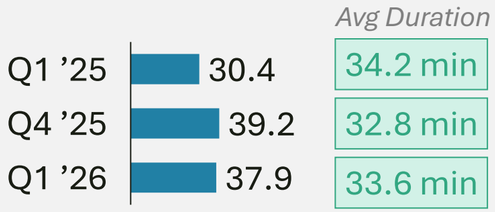
(New Ports per New Station)



Utilization Rate (in %)

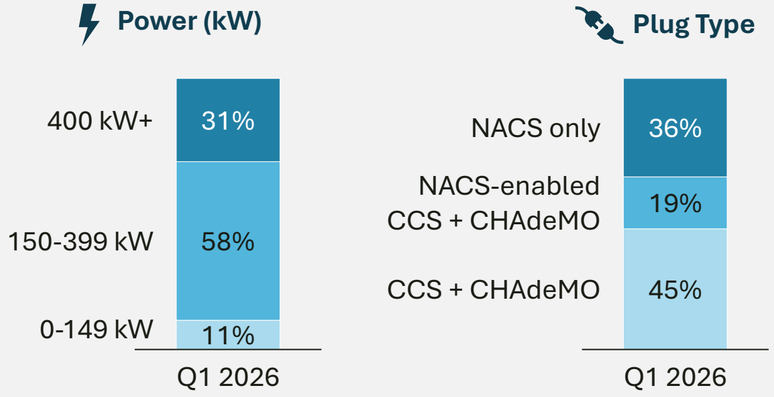


Sessions (Volume in M)

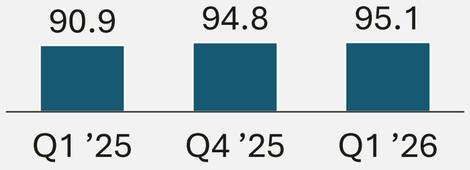


New Deployments Technology Mix

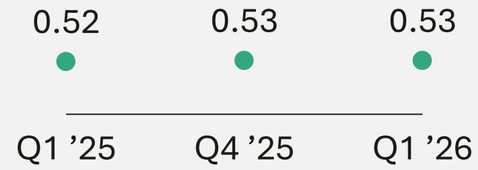
(in % of Total; by Power and Plug Type)



Reliability (in %, first-attempt)



Price per kWh (in US$)



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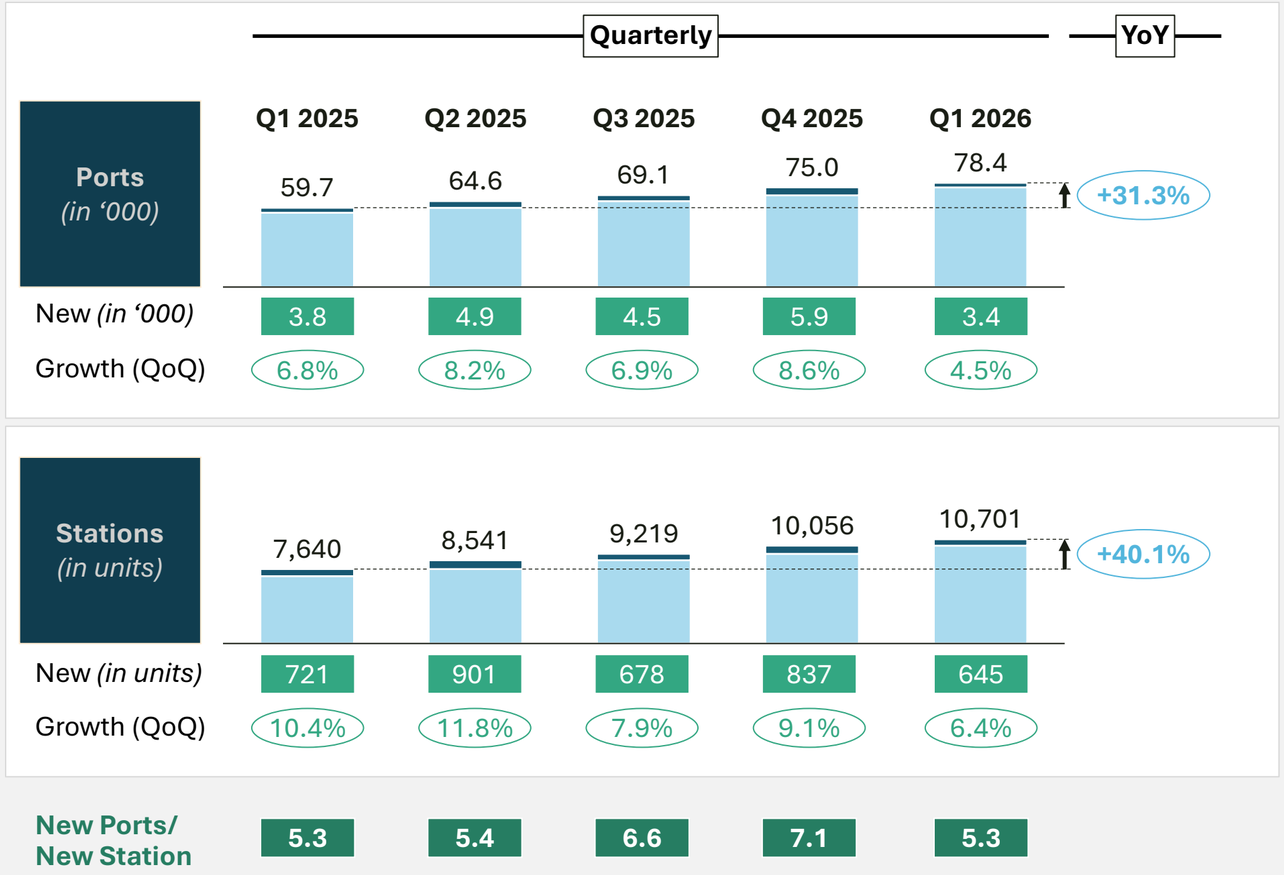
U.S. fast-charging infrastructure continues to scale rapidly, though at a gradually more sustainable pace

Infrastructure Growth (Ports and Stations; Quarterly since Q1 2025)

Source: TEI Charging Analytics Program (CAP) Analysis, Paren US DCFC Data Sets



MAIN INSIGHTS

How is charging infrastructure scaling?

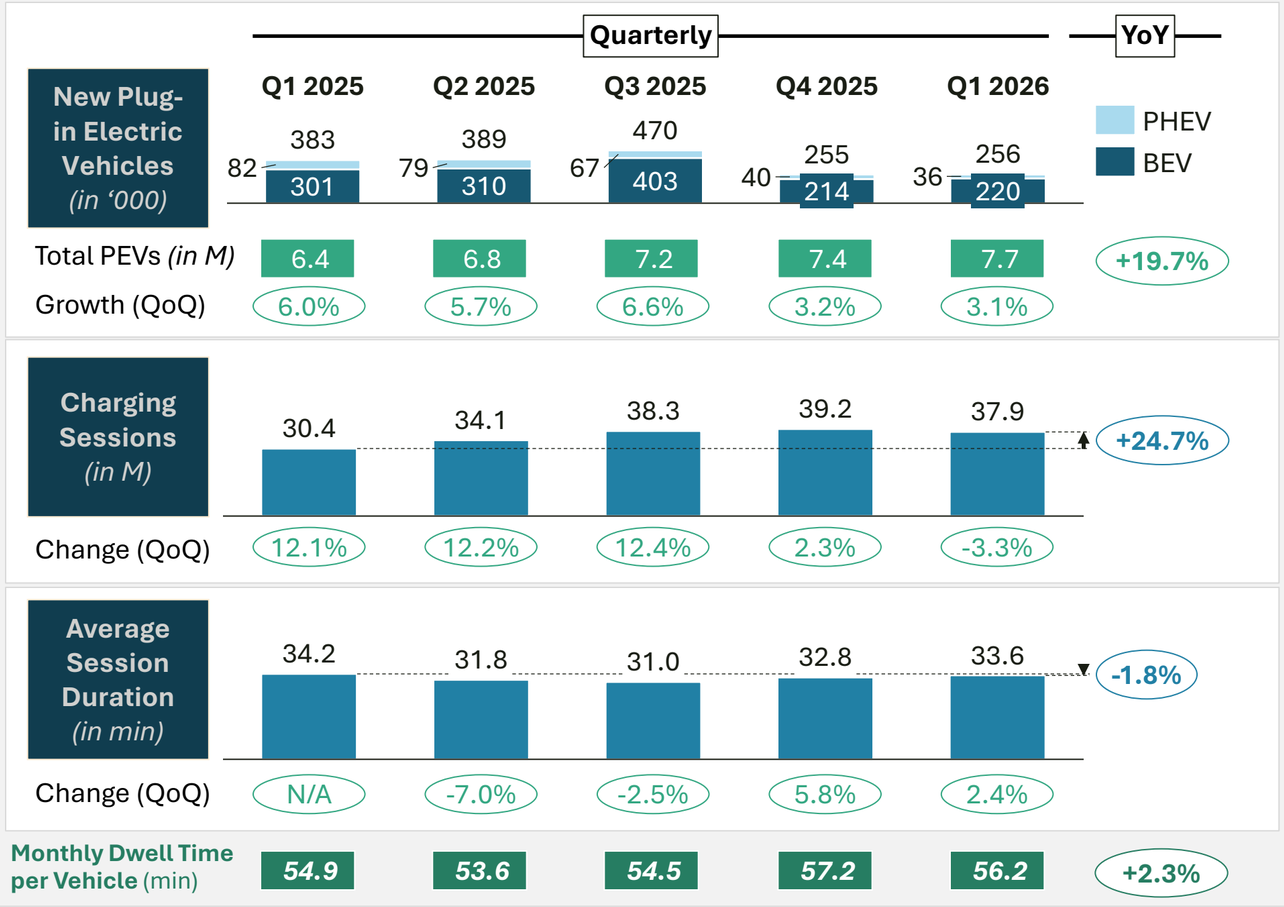
- 3,409 new ports were added in Q1 2026, reaching a total of 78,433 across the United States
  - Annual growth from Q125 to Q126 was 31.3%, compared to 33.6% from Q424 to Q425
  - Growth from last quarter was 4.5% in Q1 2026, slower than 6.8% in Q1 2025

- In Q1 2026, fewer new stations delivered slightly fewer ports (3,409 ports/645 stations = 5.3 on average) compared to Q1 2025 (3,801 ports / 721 stations = 5.3 on average)
  - While TEI's industry conversations suggest that leading networks are increasingly planning for 8-12 ports per location, that trend wasn't apparent yet in the data received once taking seasonality into account.

Sessions increased by ~25% year-on-year, despite continued but slower EV adoption since Q4 2025

Public Fast Charging Demand Growth (Car, Sessions, Duration; Quarterly since Q1 2025)

Source: TEI Charging Analytics Program (CAP) Analysis, Omdia, Paren US DCFC Data Sets



MAIN INSIGHTS

How is charging demand growing?

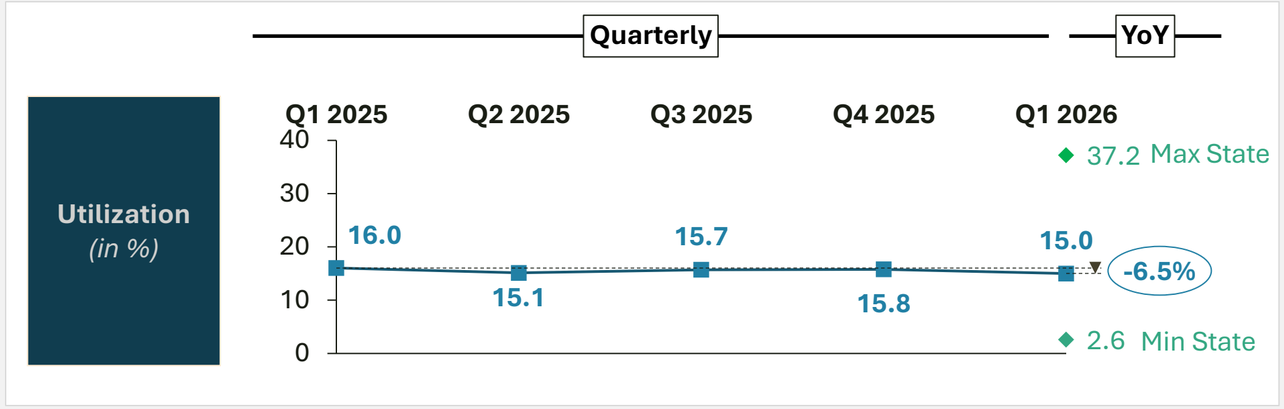
- Adoption of plug-in electric vehicles (EVs) continued but slowed down in the wake of policy changes since Q4 2025
  - Growth was closer to 3% in Q4 2025 and Q1 2026, down from closer to 6% in the previous quarters
  - Nevertheless, the total number of plug-in EVs (both BEV - full electric - and PHEV - plug-in hybrids) passed 7.5 million in Q1 2026, up ~20% year-on-year from Q1 2025

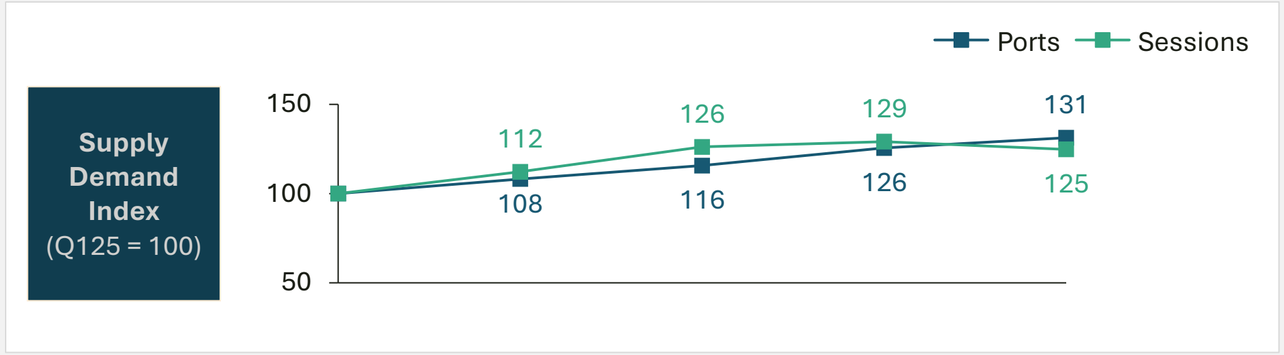
- The total volume of charging sessions grew rapidly year-on-year, driving a moderate increase in average dwell time
  - The number of sessions rose by close to 25% nationally year-on-year in Q1 2026
  - Meanwhile, average session duration pared back slightly by less than 2%
  - All these factors considered, they combined to drive a modest 2.3% increase in average dwell time by vehicle year-on-year in Q1 2026

Demand continues to absorb new capacity, but utilization varies greatly by region

Supply/Demand Balance (Ports and Sessions Growth, Utilization; Quarterly since Q1 2025)

Source: TEI Charging Analytics Program (CAP) Analysis, Paren US DCFC Data Sets





	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
EVs/port ('000)	107.2	104.7	104.3	99.1	97.7
Sessions/port per day	5.7	5.9	6.2	5.8	5.4

MAIN INSIGHTS

Is infrastructure keeping pace with demand?

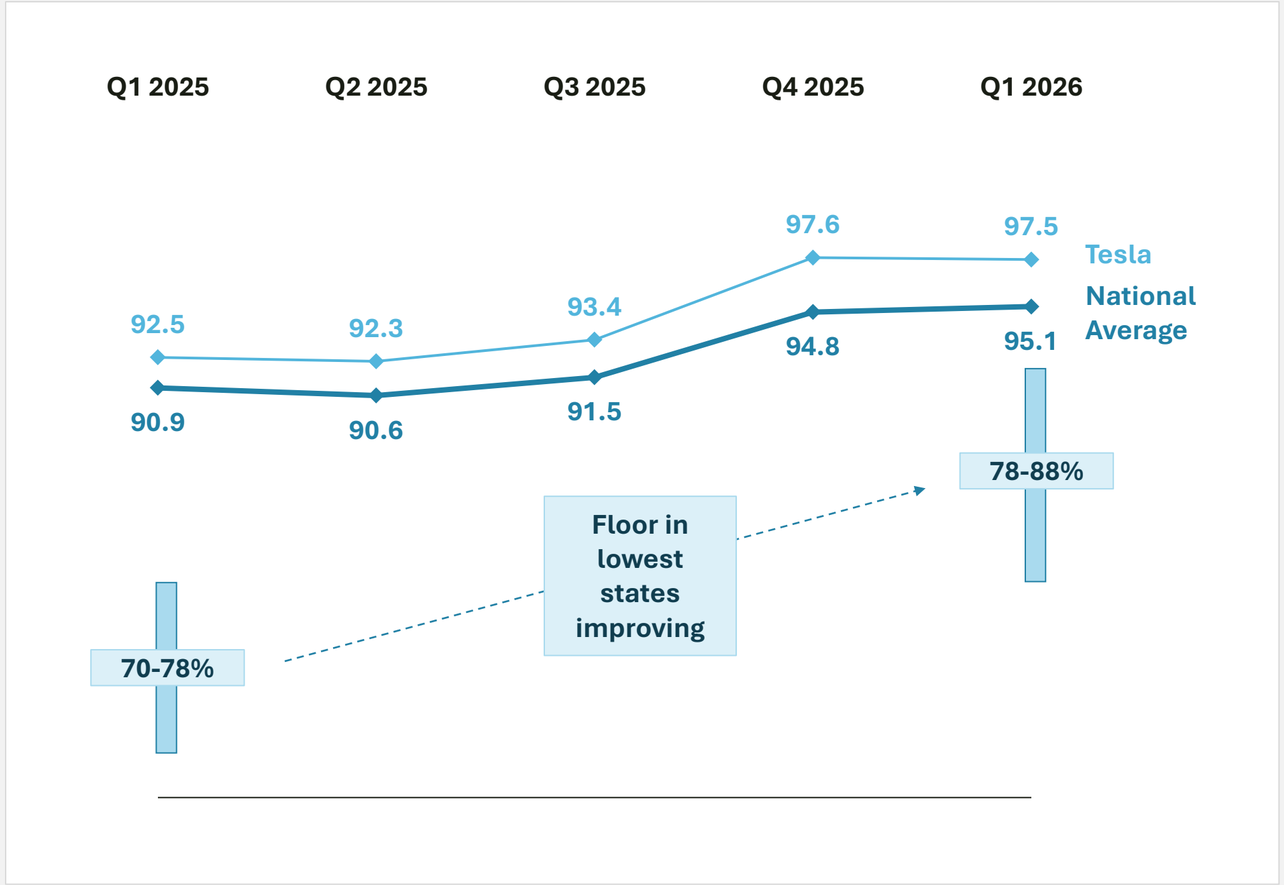
- National average utilization held roughly stable, within the 15% to 16% band, throughout the last year
  - This is in line with expectations in the scaling phase, though likely lower than what will be commercially healthy at scale
  - Average utilization at 15% translates to peak daily utilization closer to 23% in the bottleneck period from noon to 5pm

- Utilization varies greatly by region, with different states ranging from 2.6% to 37.2%
  - Some states like CA, WA, NJ are relatively balanced at their stage of development (15-25% utilization), while others like FL, NY and DC are edging towards congestion (25-35%)
  - Meanwhile, states like TX, CO and MN are in anticipatory build-out (~6-15%), while more dispersed and interior markets tend to face underutilization (2-8%) for now

Reliability is maturing, but the national picture hides differences across networks and regions

Reliability Index (First-try Success; Quarterly since Q1 2025)

Source: TEI Charging Analytics Program (CAP) Analysis, Paren US DCFC Data Sets



MAIN INSIGHTS

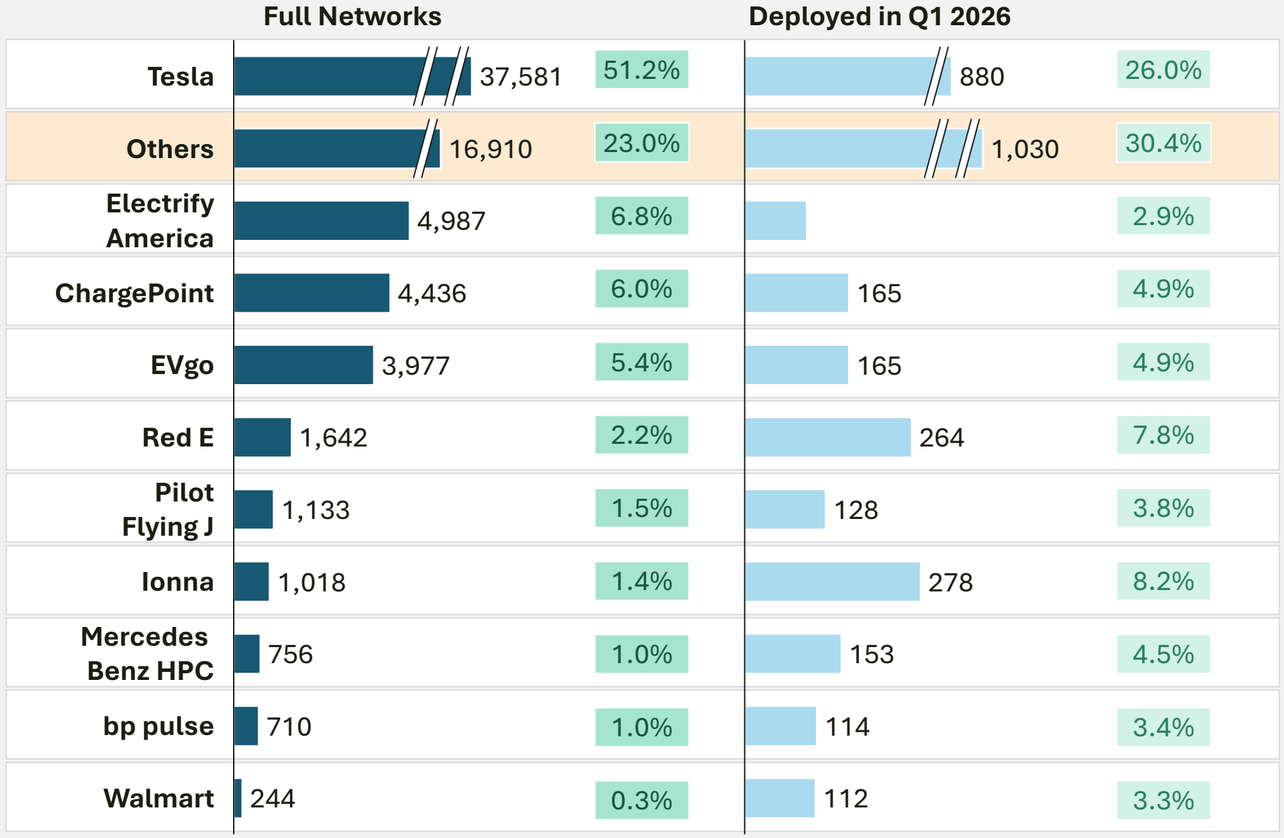
Is the charging experience improving?

- Overall, reliability has surpassed 95% on first try in Q1 2026, with most states in the 90–95% range
- The Tesla network has trended towards 97-98% success since Q2 2025, up from 96% in Q1 2025, and consistently above the national average
- All of the top 30 metropolitan statistical areas (MSAs) - except Detroit (91.6%) - operated at 94+% during Q1 2026
- The reliability floor is rising: lower-performing states improved from 70-78% in Q1 2025 to 78-88% in Q1 2026

Network growth is shifting across a broader group of operators, with some new entrants scaling rapidly

Market Shares (Top 10 CPOs/Networks, by # of Ports, Q1 2026)

Source: TEI Charging Analytics Program (CAP) Analysis, Paren US DCFC Data Sets



Note: Network/operator classifications reflect the available market data and may not always correspond precisely to asset ownership, site ownership, or the legal entity operating the equipment.

MAIN INSIGHTS

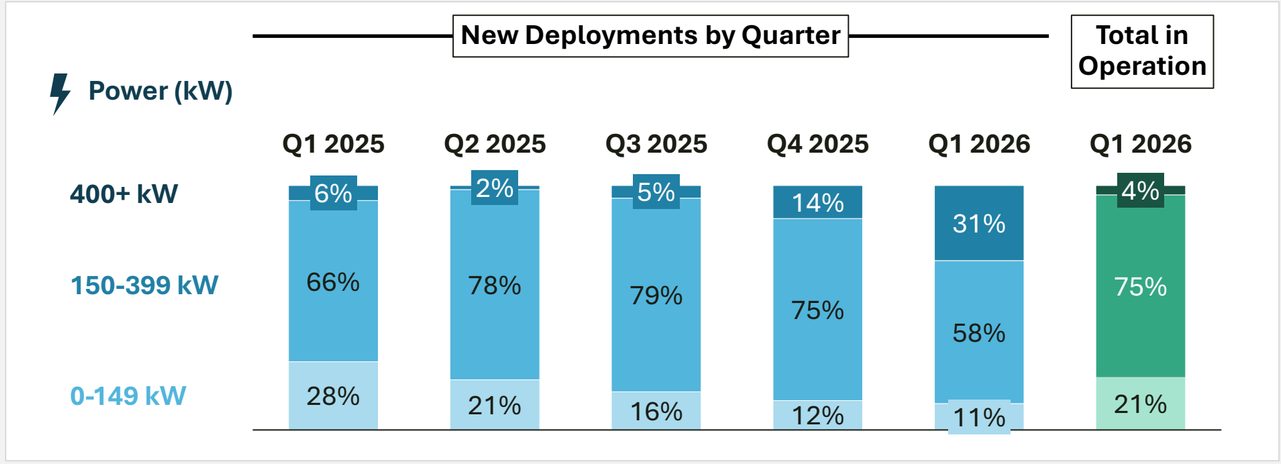
How is the deployment race evolving?

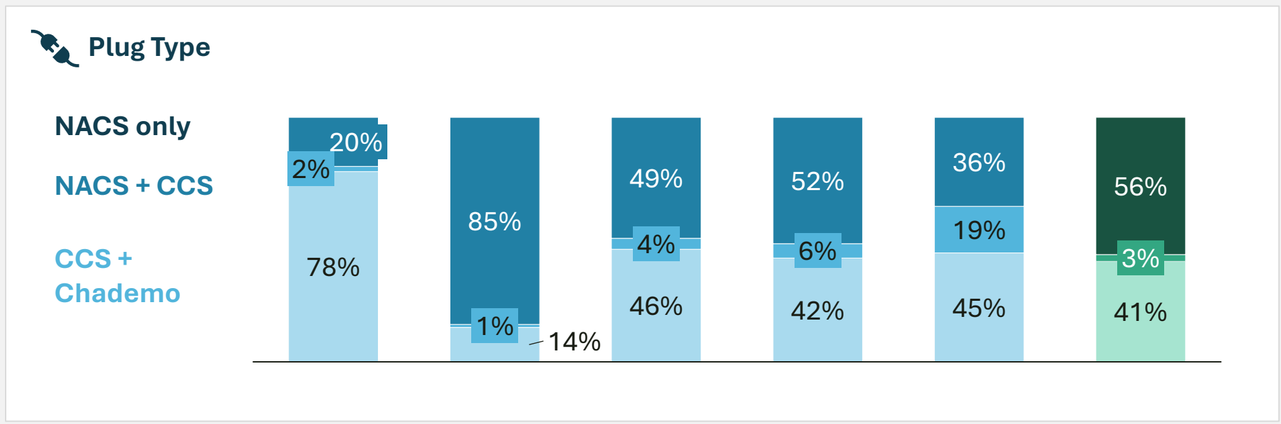
- Tesla still continued to lead deployment, with 880 new ports (26%), but its role in growth diminished
- Deployment growth is spreading across a wider base of operators, the group outside the top 10 accounting for a greater share of new ports (30.4%) than Tesla
- Ionna and Red E scaled rapidly, contributing 8.2% and 7.8% of new deployments, respectively,
- Broader competition is gradually eroding the scale advantage and contributing to shift differentiators to execution quality

High power and NACS+CCS chargers are surging in new deployments, but are scaling from low bases

Technology Mix (in % of Total; Power and Plug Type; Quarterly since Q1 2025)

Source: TEI Charging Analytics Program (CAP) Analysis, Paren US DCFC Data Sets





MAIN INSIGHTS

How is the deployed technology mix evolving?

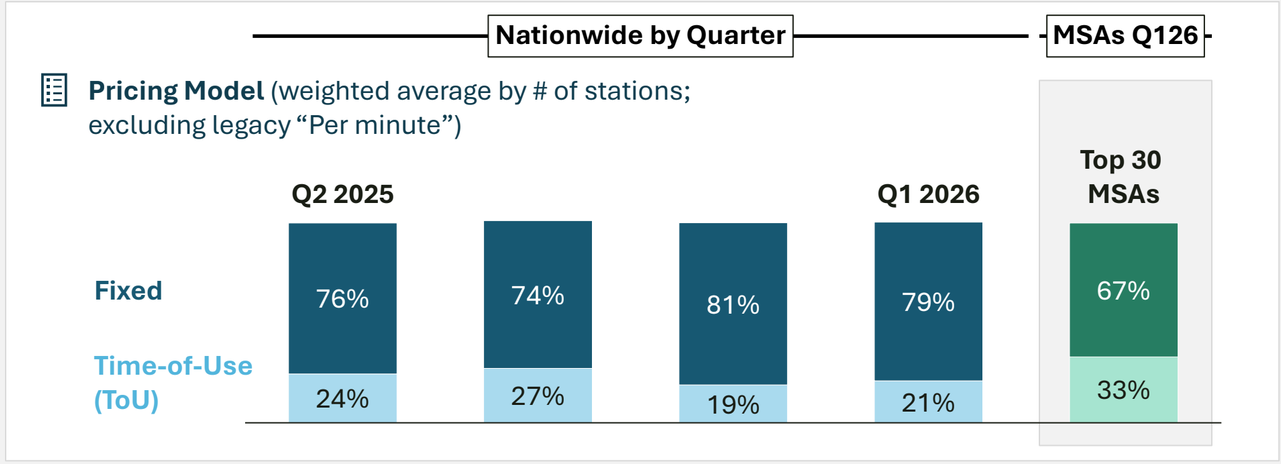
- High power charging is becoming the default for new DCFC deployments, with 400+kW surging
  - 150+kW ports represented close to 90% of new ports in Q1 2026
  - 400+kW power charging represented more than 30% of new installations in Q1 2026, from 2-6% in the first half of 2025

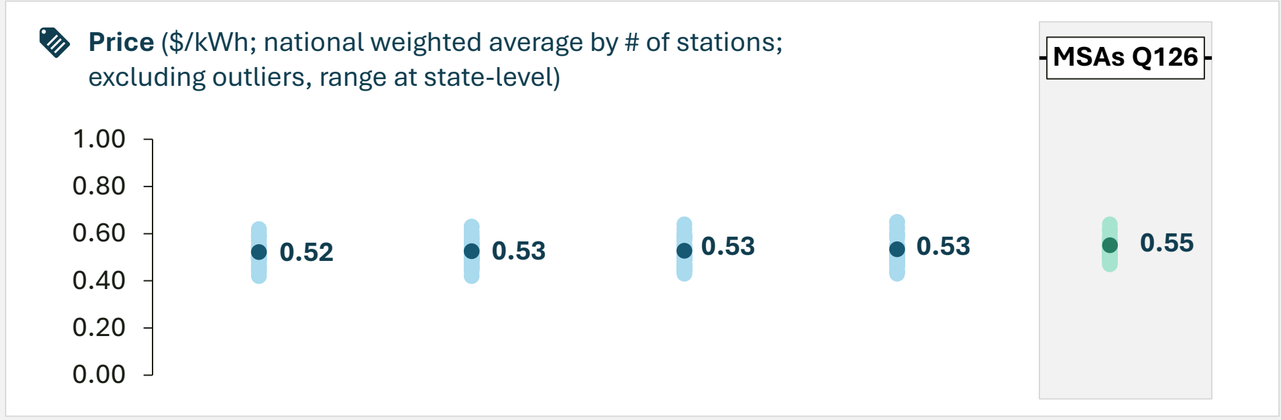
- Non-Tesla NACS chargers surged, but from a low base; CCS remains the backbone outside Tesla
  - NACS-enabled chargers represented 55% in Q1 2026, in line with the share of the last 3 quarters and close to the share of the NACS-enabled installed base (59%)
  - Tesla ports still represent 95% of the total base of NACS-enabled chargers
  - Outside the Tesla network, chargers without NACS/J3400 connector still account for 93% of the installed base and 70% of new chargers

Pricing has remained broadly stable since Q2 2025, with state and MSA variations

Pricing Trends

Source: TEI Charging Analytics Program (CAP) Analysis, Paren US DCFC Data Sets





MAIN INSIGHTS

How are pricing dynamics evolving?

- As markets mature, pricing will gain in sophistication, but initial roll-outs typically start with straightforward pricing approaches
  - Only kWh pricing has been collected, excluding Flat-fee memberships and rare Per-minute pricing (2.7% of stations) typically tied to regulatory constraints or legacy deployments
  - No dynamic pricing has been observed yet
  - Nationally, Fixed pricing continues to dominate Time-of-Use (ToU) with ~ 80% of stations, up from 75% in Q2 2025
  - In the top 30 metropolitan statistical areas (MSAs), pricing is swinging towards Fixed, from 58.5% of stations in Q225 towards 67% of stations in Q126, with growth spurts

- Pricing ranges from 0.43$/kWh to 0.65$/kWh, with a national weighted average 0.53$/kWh
  - National weighted average price increased by 2.4% since Q2 2025, broadly in line with CPI inflation over that period

Appendix: Definitions (1/2)

Market & Geography

Charge Point Operator (CPO)	Entity responsible for operating, maintaining, and/or managing access to charging equipment (may own the equipment, operate it on behalf of a site host, or manage it under a commercial agreement)
Network / Brand	Customer-facing network or brand, under which chargers are made available and reported in market data (may correspond to CPO, OEM-backed network, retail-hosted program, branded site network, or commercial partnership)
Metropolitan Statistical Area (MSA)	U.S. Census-defined regional market built around an urban core and surrounding economically linked areas
State	U.S. state-level market geography, including the 50 U.S. states and Washington, D.C., unless otherwise noted
NEVI	National Electric Vehicle Infrastructure program. Federal funding program established under the Bipartisan Infrastructure Law to support public EV charging corridors and related infrastructure

Vehicles & Demand

Plug-in Electric Vehicle (PEV)	Light-duty vehicles that can be charged from an external power source, including passenger cars, SUVs, crossovers, vans, and light-duty pickups
Battery Electric Vehicle (BEV)	Fully electric light duty vehicle powered only by a rechargeable battery
Plug-in Hybrid Vehicle (PHEV)	Light duty vehicle with both a rechargeable battery and an internal combustion engine (ICE)
Charging Session	A charging event initiated by a driver or vehicle at a charging port, whether successful or unsuccessful, as tracked in the underlying data
Average Session Duration	Average amount of elapsed time associated with a tracked charging session's start and end, including successful and unsuccessful charging activity as captured in Paren's session data
Monthly Dwell Time per Vehicle	Estimated average monthly time spent charging per plug-in vehicle, based on total charging activity and the number of plug-in vehicles.

Infrastructure & Technology

Public Direct Current Fast Chargin (DCFC)	Public direct current charging above 24 kW, unless otherwise noted
Connector	Physical plug attached to a charging cable, such as CCS, CHAdeMO, or NACS/J3400.
Port	A charging position with one or more connectors but capable of serving one EV at a time, regardless of its number of connectors
Charger	Charging dispenser or hardware unit that may contain one or more ports
Station	A physical charging site/location with one or more chargers and ports
Electric Vehicle Supply Equipment (EVSE)	Combination of hardware, software, communications, and safety systems used to deliver electricity from the grid or site equipment to an EV
Installed Base	Total ports, chargers, stations, or connectors in operation at a given point in time
New Deployments	Ports, chargers, stations, or connectors added during a specific reporting period
Combined Charging System (CCS)	Combined Charging System connector standard used by many non-Tesla EVs and charging networks in North America
CHAdeMO	Earlier DC fast-charging connector standard, still present in parts of the installed base but declining in new deployments
NACS-enabled Connector	North American Charging Standard / SAE J3400 connector (originally developed by Tesla and increasingly adopted by OEMs and charging networks)
Power Rating	Maximum rated power of a port or charger, expressed in kilowatts (kW) (power delivered may vary based on vehicle, site, battery, conditions)
High-Power (HP) and Ultra-High-Power (UHP)	Charging rated at 150+ kW (HP) or 400+ KW (UHP), unless otherwise noted

Appendix: Definitions (2/2)

Network Performance

Reliability Index	Refers to first-attempt charging success rate, though TEI may refine this metric over time to incorporate additional dimensions of reliability
Utilization	Share of available port time during which tracked charging activity occurs, including successful and unsuccessful sessions, over the port's open period
First-attempt success	Share of sessions that successfully initiate on the driver's first attempt, without requiring customer support, retry, charger change or workaround
Sessions per Port per day	Average number of charging sessions delivered per port per day (a demand intensity metric)
EVs per Port	Number of plug-in vehicles per public fast-charging port (a broad indicator of infrastructure availability relative to the EV fleet)
Supply/Demand Index	Indexed evolution (Q125 = 100) of supply (ports) & demand (sessions) growth

Pricing

Fixed kWh Price (FP)	A consistent price per kWh throughout the charging session, regardless of time of day
Time-of-Use (ToU)	A pricing structure in which the per-kWh rate varies by time of day or defined time period
Time-based (TB)	Pricing based on charging time, such as dollars per minute or hour (often associated with regulatory constraints or legacy pricing models)
Dynamic (DYN)	Variable pricing that changes based on market conditions, such as demand, congestion, location, grid costs, or other supply/demand factors
Membership (MS)	Pricing tied to a subscription or account-based plan, often offering discounted rates, bundled benefits, or access privileges
Weighted-average Price	Average price adjusted by the relevant weighting factor, such as station count, port count, or observed charging activity
Outlier	Observations excluded because they are outside of +/- 2 times the interquartile range (IQR) of the data points

Appendix: Metropolitan Statistical Areas (MSAs)

MSA Shortform	Metropolitan Statistical Areas (MSAs)
Atlanta	Atlanta-Sandy Springs-Alpharetta
Austin	Austin-Round Rock-Georgetown
Baltimore	Baltimore-Columbia-Towson
Boston	Boston-Cambridge-Newton
Charlotte	Charlotte-Concord-Gastonia
Chicago	Chicago-Naperville-Elgin
Cincinnati	Cincinnati-Wilmington-Maysville
DFW	Dallas-Fort Worth-Arlington
Denver	Denver-Aurora-Lakewood
Detroit	Detroit-Warren-Dearborn

MSA Shortform	Metropolitan Statistical Areas (MSAs)
Houston	Houston-The Woodlands-Sugar Land
Las Vegas	Las Vegas-Henderson-Paradise
Los Angeles	Los Angeles-Long Beach-Anaheim
Miami	Miami-Fort Lauderdale-Pompano Beach
Minneapolis	Minneapolis-St Paul-Bloomington
New York	New York-Newark-Jersey City
Orlando	Orlando-Kissimmee-Sanford
Philadelphia	Philadelphia-Camden-Wilmington
Phoenix	Phoenix-Mesa-Chandler
Pittsburgh	Pittsburgh (Washington-New Kensington)

MSA Shortform	Metropolitan Statistical Areas (MSAs)
Portland	Portland-Vancouver-Hillsboro
Riverside	Riverside-San Bernardino-Ontario
Sacramento	Sacramento-Roseville-Folsom
San Antonio	San Antonio-New Braunfels
San Diego	San Diego-Chula Vista-Carlsbad
San Francisco	San Francisco-Oakland-Berkeley
Seattle	Seattle-Tacoma-Bellevue
St. Louis	St. Louis-St. Charles-Farmington
Tampa	Tampa-St Petersburg-Clearwater
Washington DC	Washington-Arlington-Alexandria

About the Charging Analytics Program (CAP)

Charging Analytics Program
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The Charging Analytics Program is TEI's intelligence platform for the evolving charging ecosystem.

Ongoing Insights

Shareable
- Trends
- Charts
- Quotes

Quarterly Pulse Check

- Executive Summary
- US Charging Pulse Check

EV Council Perspective

- US Charging Perspective (Exclusive Quarterly Presentation to EV Council Members)

On-demand Analysis

- Custom Analytics
- Benchmarking
- Executive Briefings

Contact us to discuss the EV charging questions that TEI's Charging Analytics Program could support you with.

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About the EV Council

Electric Vehicle Council
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The EV Council brings together retailers, charge point operators, automakers, utilities, technology providers, agencies, and other industry leaders to collaboratively develop objective research and practical market intelligence that helps the industry make better business and investment decisions.

Unlike traditional industry groups, EV Council members don't simply discuss the challenges facing the industry - they help shape the research, data, and insights that move the industry forward.

As a member, you'll have the opportunity to:

- ✓ Influence original research on customer behavior, charging economics, emerging technologies, regulatory developments, and market trends.
- ✓ Access exclusive market intelligence through collaborative research, member briefings, proprietary datasets, and actionable industry insights.
- ✓ Work alongside industry leaders to identify practical solutions and help define the future of transportation energy.

Whether your organization is deploying charging infrastructure, developing technology, manufacturing vehicles, operating retail sites, or shaping energy policy, the EV Council provides a unique forum to collaborate, learn, and lead.

Join the EV Council - and help shape the research driving the future of transportation energy.

About the Transportation Energy Institute

Gen Comtois

Senior Executive Advisor
Market Intelligence
& Strategic Initiatives

John Eichberger

Executive Director
Transportation Energy Institute

The Transportation Energy Institute (TEI) is a non-profit, non-advocacy think tank dedicated to the transportation energy sector. In a constantly evolving market, TEI delivers objective, data-driven research and analysis that inform business and policy decisions.

Grounded in rigorous methodology, peer review, and real-world market insights, TEI fosters cross-industry collaboration to produce trusted, forward-looking analysis. Committed to neutrality and analytical rigor, TEI does not advocate for specific outcomes, but instead equips decision-makers with clear, fact-based insights to navigate the future of transportation energy.