

# Going Behind the Fence: A Data and Policy Deep Dive on the Fleet and Multi- Family Charging Markets

Market intelligence for the distributed energy transition.

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Offices: Boston & San Diego

# 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

## Select Clients

**BTC POWER**

**SIEMENS**

 **Epic Charging**

 **everged**

 **MONTERRA**

 **rexel**

 **sonepar**

**TESLA**

**AUTEL**

**wevo**

 **ORANGE**

 **MILLER**  
MILLER ELECTRIC COMPANY

 **Schneider**  
**Electric**

# Ohm Data Network



**Cities & Counties:** Relationships with 2,000+ municipalities across the US to access building & electrical permits



**Incentive Programs:** Aggregating data from federal state, and utility programs rich with detail on charging OEM & CMS getting installed



**Partners:** Network of EV charging contractors, proposal tool software, CPOs, and charging OEMs sharing detail on their projects



**Alternative Fuels Data Center:** Primarily used for information on public charging networks

## Thank You to our Data Partners



and more...

To become a data partner for our upcoming Q2 report, contact [larsen@ohmanalytics.com](mailto:larsen@ohmanalytics.com)

# Agenda

Overall Market Trends & Volumes

Policy & Programs Outlook

Changing Market Dynamics

Takeaways and Outlook

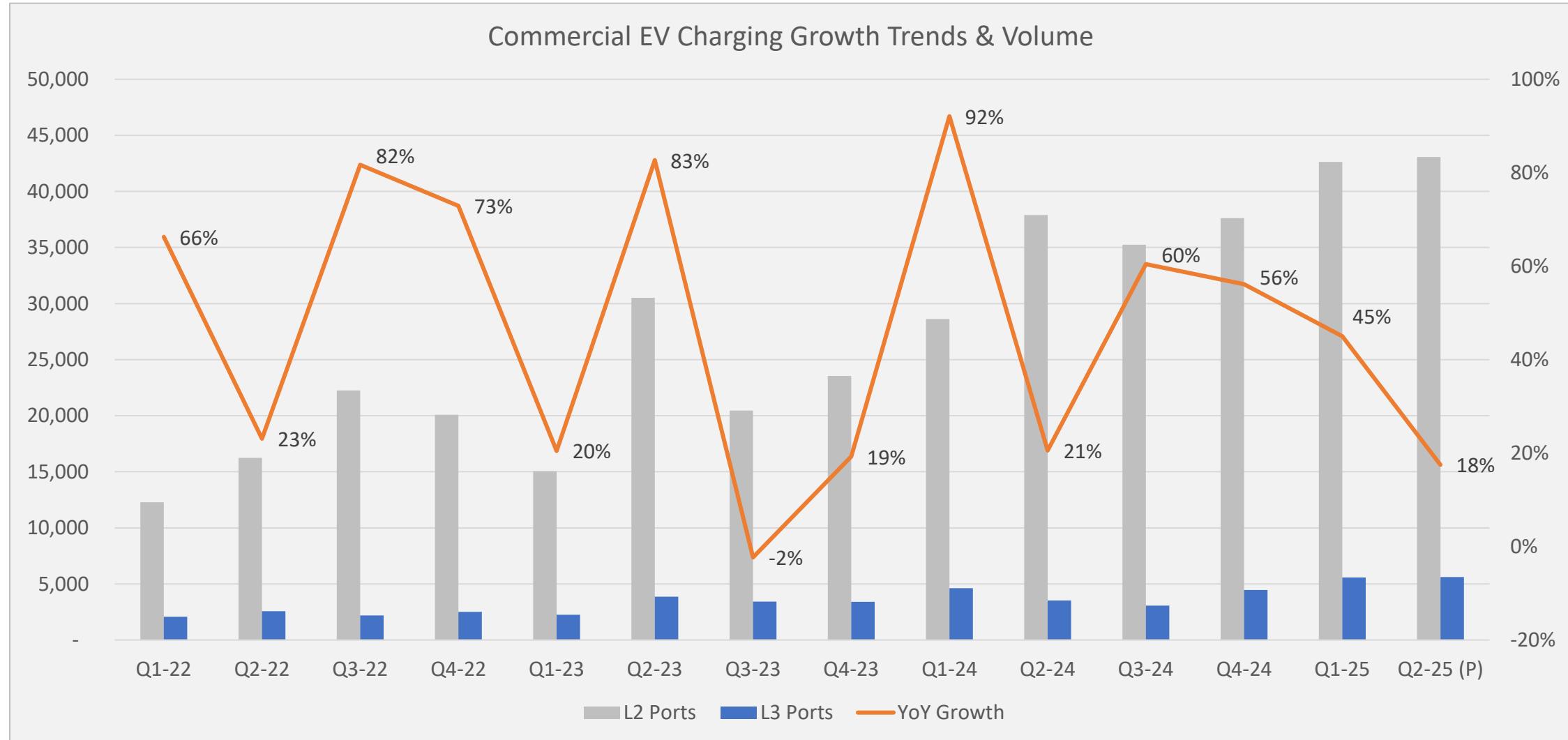
Q&A



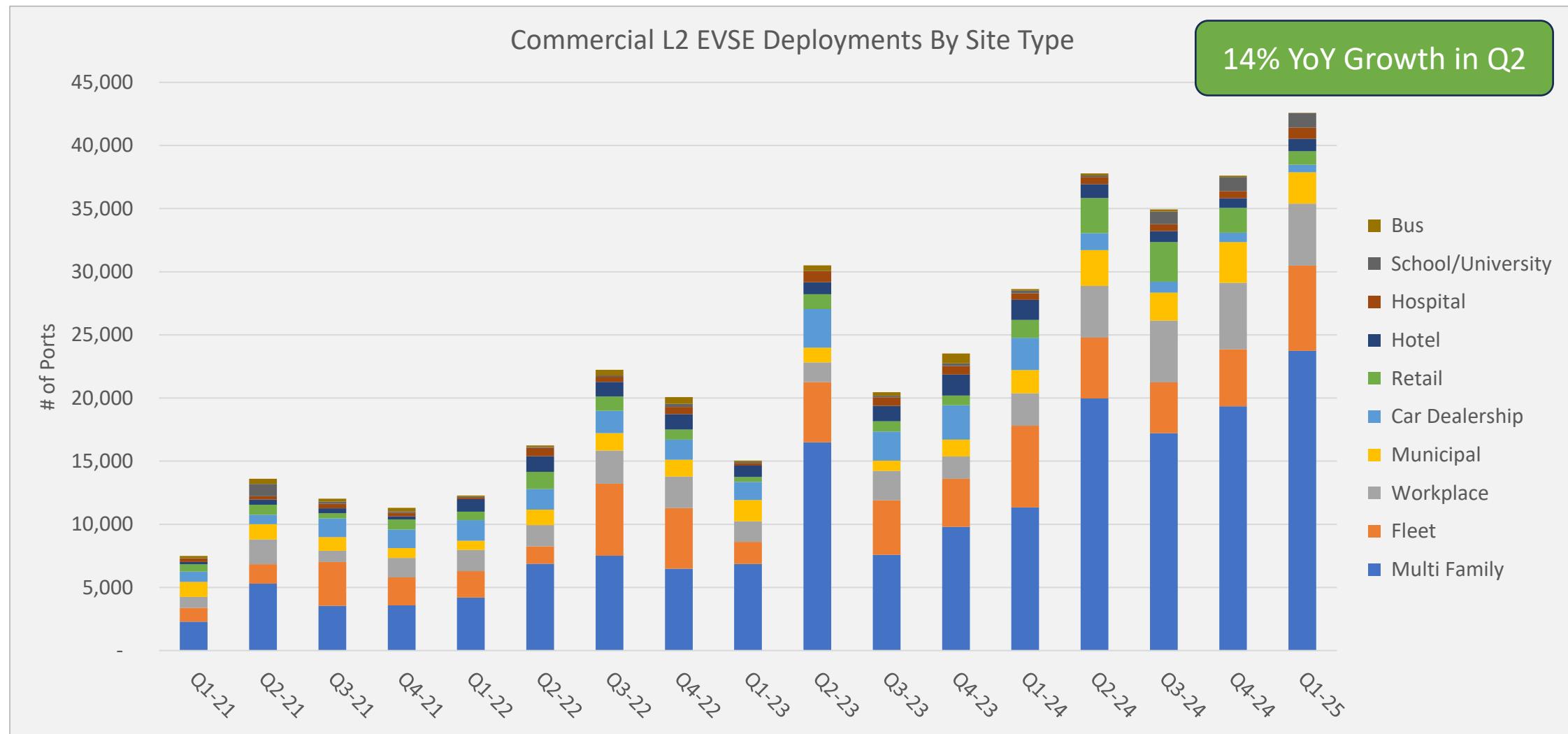
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# Current Landscape

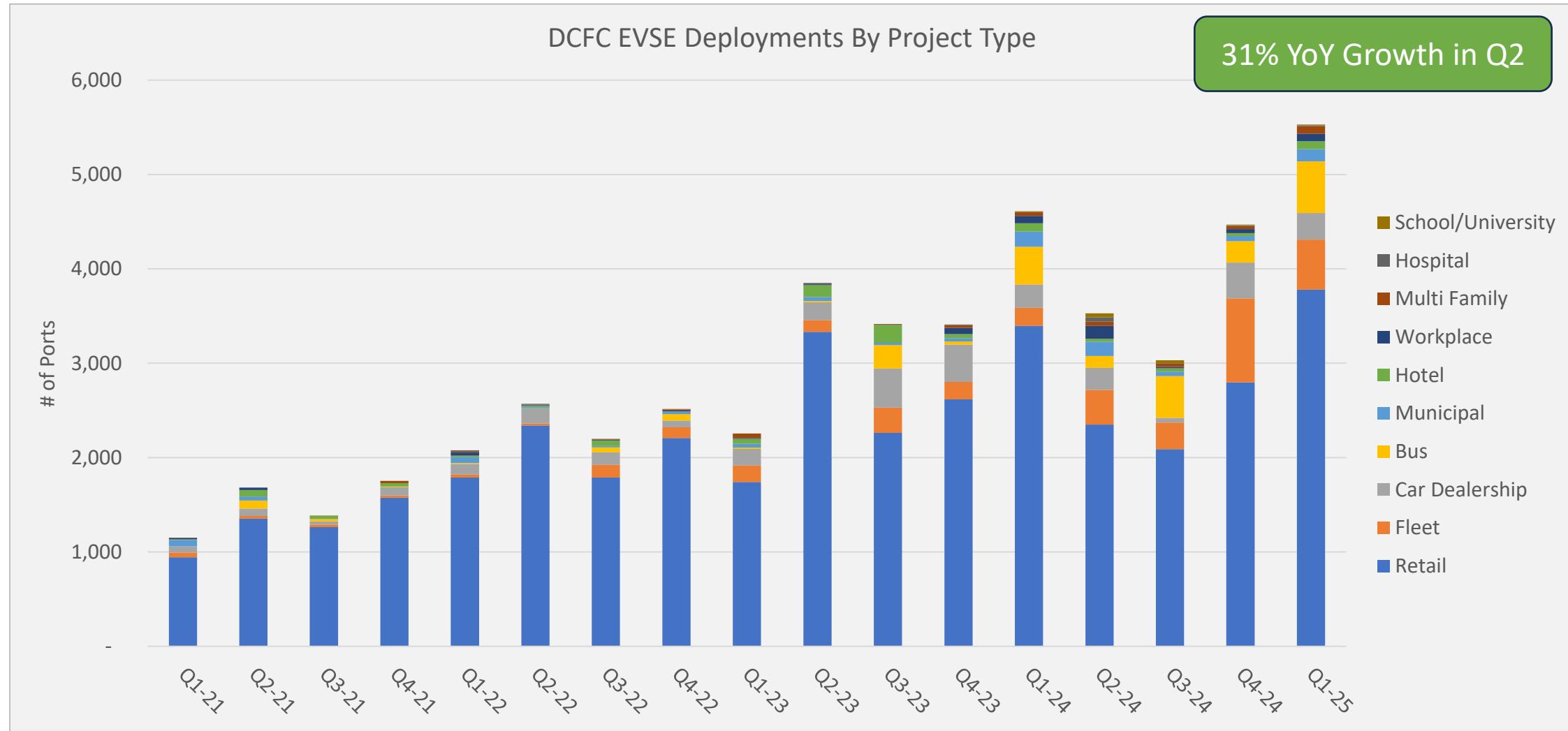
# Positive Momentum: 18% Growth YoY in Q2



# Multi Family and Fleets are 70%+ of L2 Market and Driving the Market



# Public Charging Still Dominates DCFC, but MHD Fleets are Growing



# Chicago EV Charging Projects: May & June

Ohm○ Analytics



Multi Family

Workplace

Fleet

Fast Charging

## 100M Apartments at Grand Park

**6/12/25:** Gurtz Electric installs 23 L2 chargers an apartment complex



## Green Water and Power

**6/3/25:** Green Water and Power installs 10 L2 chargers at 1407 on Michigan, making IL the 10<sup>th</sup> and latest state they have installed in



T H E  
6 0 1 W  
C O M P A N I E S

## Old Post Office Garage

**6/9/25:** Property owned by 601W Companies Chicago LLC installs 12 L2 chargers



## Costco

**5/13/25:** Dynamic Electric Installing 10 DCFC at Costco on North Clyborn Avenue for Electrify America



**Dynamic Electric, Inc.**  
12800 South Cicero  
Alsip, Illinois 60803-3044  
[sales@dynamicelectric.com](mailto:sales@dynamicelectric.com)



## Davis Imperial Cleaners

**5/8/25:** Kapital Electric Company Installs 4 L2 chargers for a dry-cleaning service fleet



 **Kapital Electric**  
renewable energy specialists



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# Policy Outlook

# Federal Priority Shift

JUL 8, 2025

## After nearly two decades, tax credits for electric vehicles will end on Sept. 30

But used EVs coming off of leases will continue to come onto the used car market.

CLIMATE

## Schools lined up for help getting cleaner school buses. Then came the EPA freeze

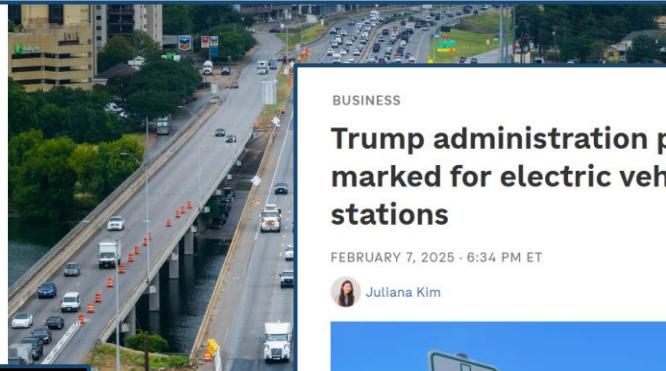


1 of 5 | Zum electric buses are parked before a news conference announcing the Oakland Unified School District as being the first major school district in the country to use 100 school buses at the Zum/USD bus yard in Oakland, Calif., on Aug. 27, 2024. (AP Photo/Jeff Chiu, File)

BY MICHAEL CASEY AND ALEXA ST. JOHN

Updated 5:35 PM EDT, April 11, 2025

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BUSINESS

## Trump administration pauses \$3 billion marked for electric vehicle charging stations

FEBRUARY 7, 2025 • 6:34 PM ET

Juliana Kim



An electric car charges at a mall parking lot on June 27, 2022 in Corte Madera, California.

Justin Sullivan/Getty Images North America

FUEL SMARTS

## Congress Revokes EPA Waivers for California's Clean Truck, NOx Rules

June 12, 2025 • By Deborah Lockridge •



DIVE BRIEF

## Trump ends California vehicle emissions waivers

Clean vehicle advocates say air quality and public health will suffer; auto and petroleum industry lobbyists supported the move to end California's authority under the Clean Air Act.

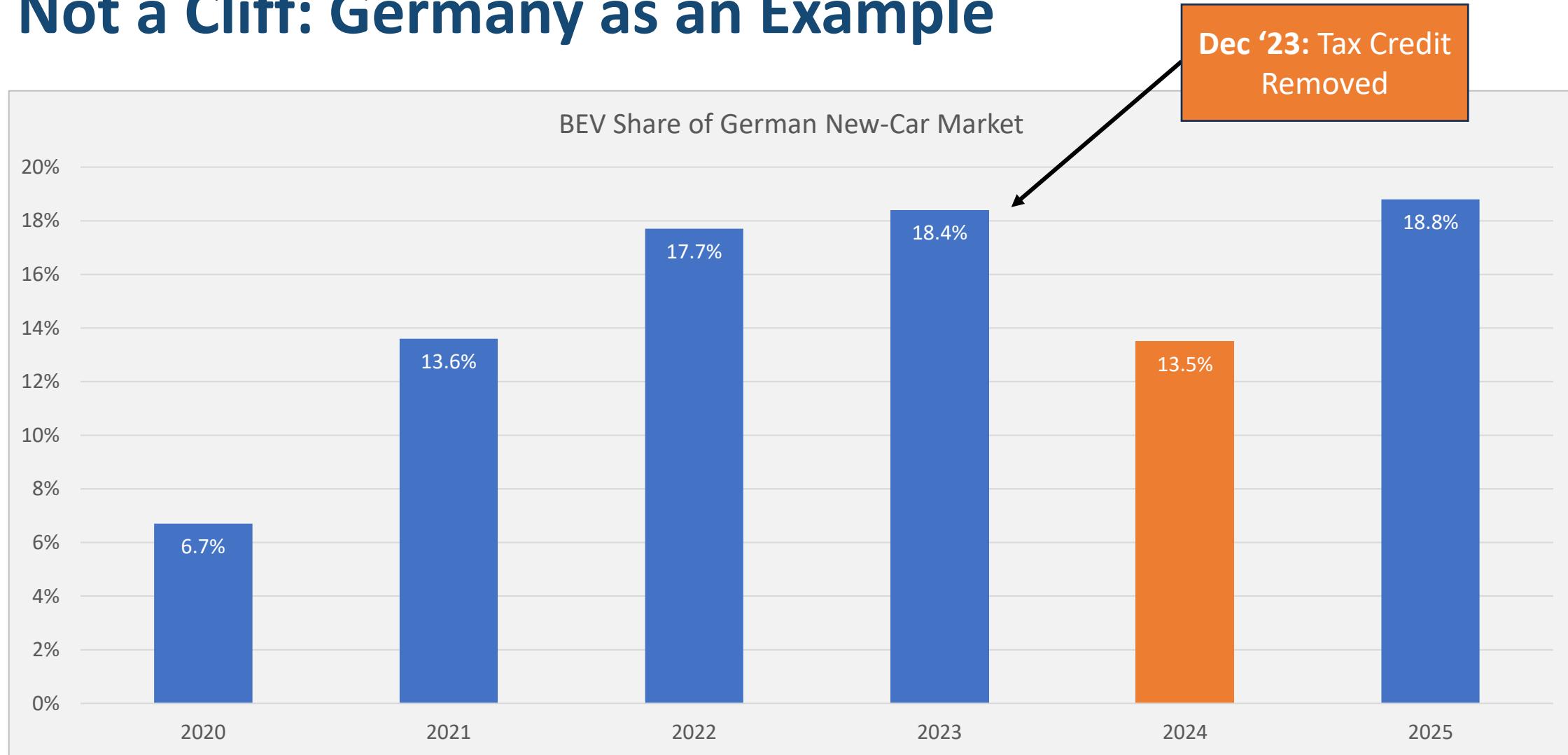
Published May 29, 2025 • Updated June 13, 2025

Dan Zukowski  
Senior Reporter

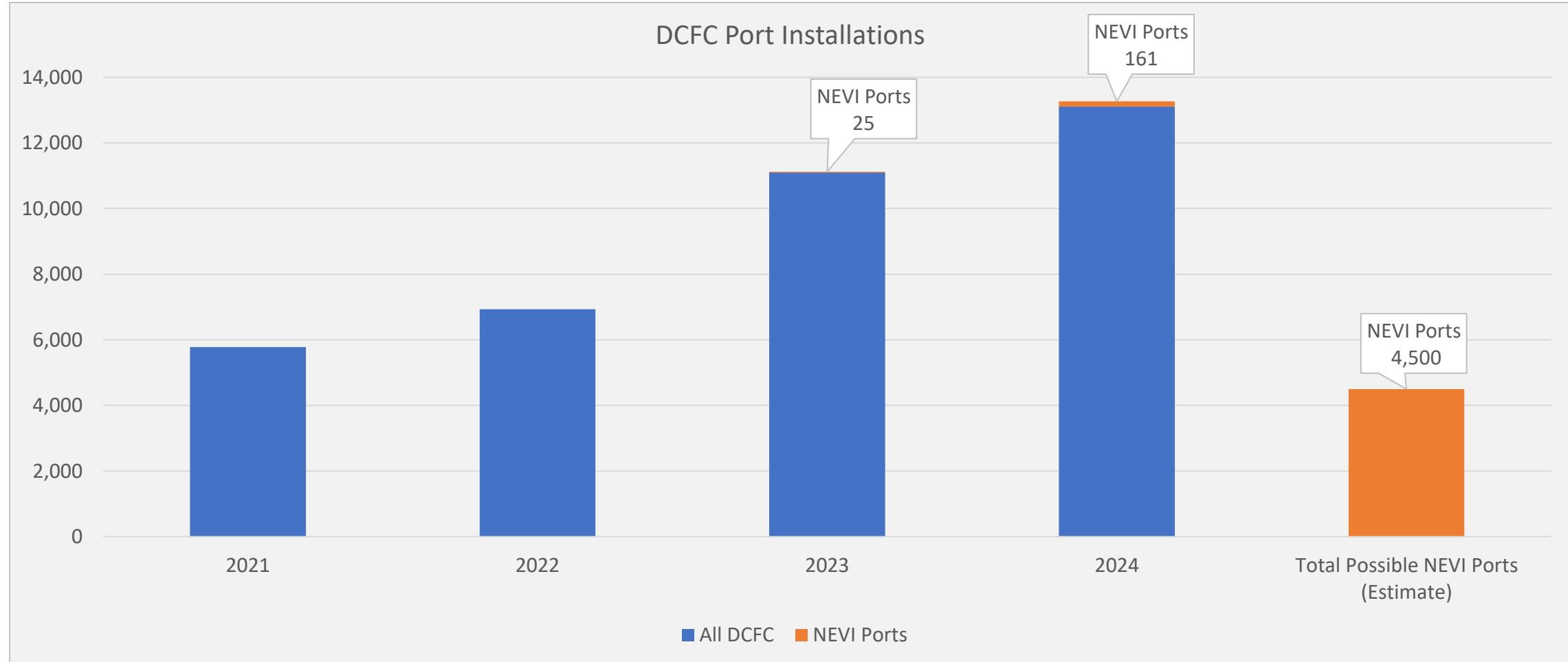


Developed in smog shortly before sunset on November 17, 2006 in Los Angeles, California. Congress' ability to set vehicle emissions standards stricter than national standards. David McNew via Getty

# Loss of EV Tax Credit is a Bump in the Road, Not a Cliff: Germany as an Example



# Federal Funding Benefited Industry but is No Longer Mission-Critical



# State and Utility Programs are Driving Adoption

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\$100M

Increased Rebate



\$9.9M

Open



\$885M

Increased Rebate



NYSERDA \$12M

Open



\$127M

Only MHD Open



\$56.5M

Upcoming



\$105M

Open



\$3M

Closed

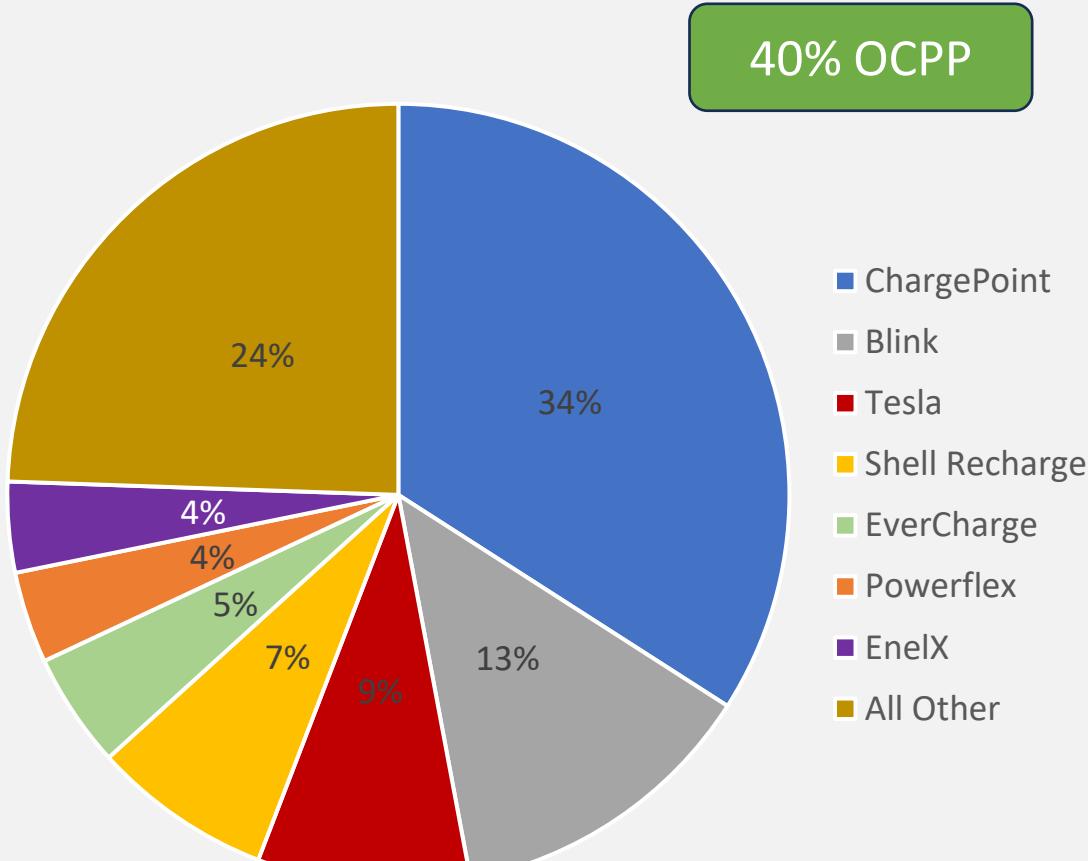


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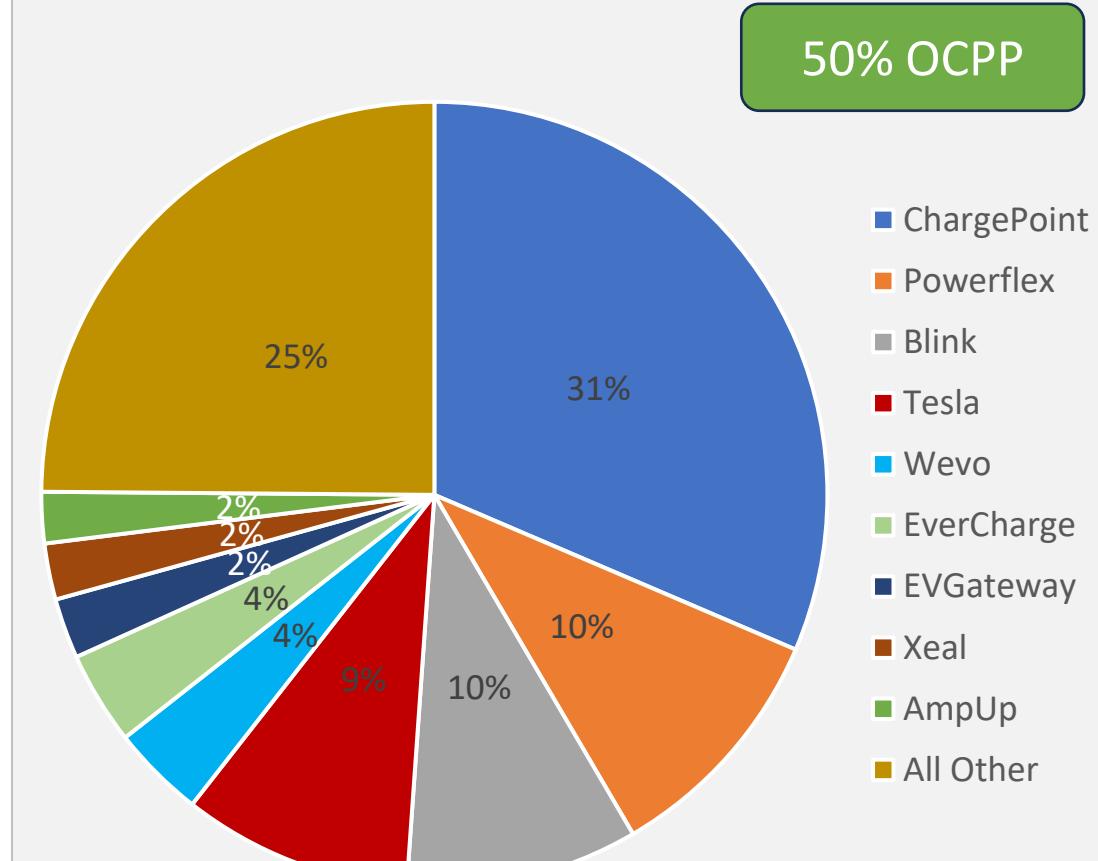
# Shifting Market Dynamics

# The Industry is More Diverse and More Open

L2 Ports Under Management Top 75% - Jan 1, 2024



L2 Ports Under Management Top 75% - Apr 1, 2025



# Rip & Replacements

## MN: Load Managed Chargers

**2/21/25:** Stone Arch Lofts in Minneapolis adds 4 chargers and replaces existing chargers with load managed chargers.

## IN: EVgo Rip & Replace

**1/28/25:** Zimmerman Electrical replaces 8 L2 chargers at a public parking garage in Indianapolis.

## CA: EVgo Rip & Replace

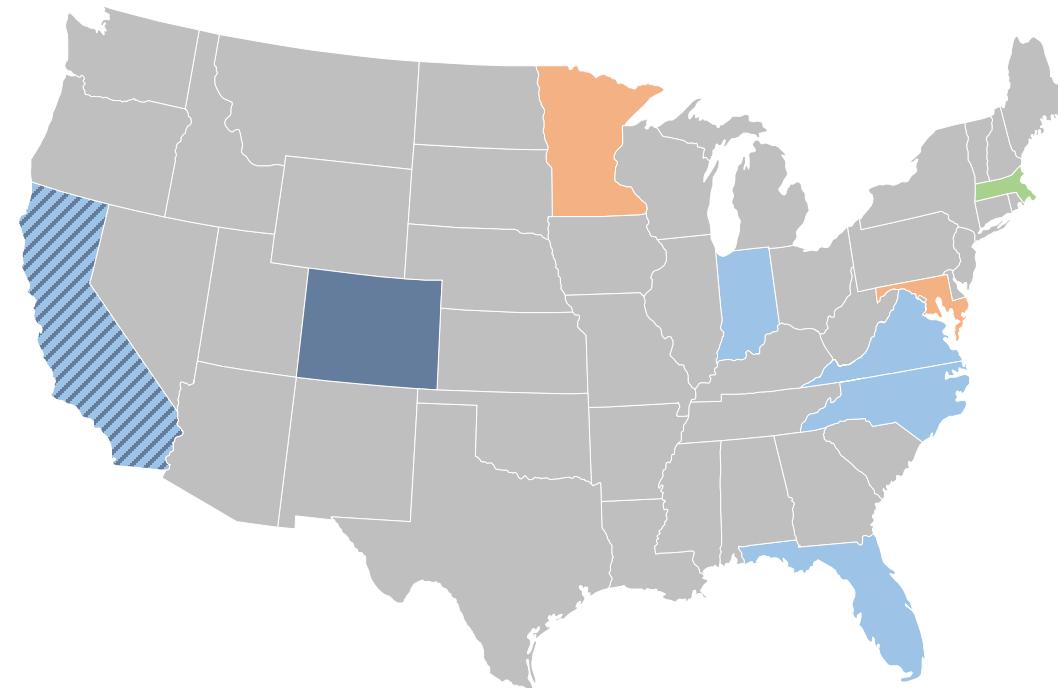
**6/30/25:** EVgo replaces 6 50kw chargers with 4 100kw chargers in Sacramento

## CA: Kaiser Permanente Workplace

**2/6/25:** PowerFlex rips and replaces 19 L2 workplace chargers for Kaiser Permanente's corporate offices.

## CO: 1800 Larimer Place Workplace

**6/28/25:** Dutch Creek Electric LLC replaces 14 Enel X Juice Box chargers with Lynkwell chargers across 2 workplace properties in Denver



## MA: Urban & Sons Insulation

**2/3/25:** Home Service Electrical replaces 5 L2 chargers for Urban & Sons Insulation's fleet in Springfield.

## MD: Multi Family Rip & Replace

**1/28/2025:** Reliable Relamping replaces 19 L2 chargers at an Avalon Bay Communities property in Annapolis.

## VA: EVgo Rip and Replace

**6/26/25:** EVgo replaces 4 50 kw BTC DCFC units with 2 100kw Delta Electronics Units

Multi Family

Workplace

Fleet

Public Charging

## FL: ChargePoint Municipal Projects

**1/29/25:** Computer Power Systems replaces 4 ChargePoint L2 chargers for the town of Largo.

## NC: EnviroSpark Replacement

**2/26/25:** EnviroSpark replaces ClipperCreek chargers with 6 new L2 chargers at City Market in Winston-Salem.

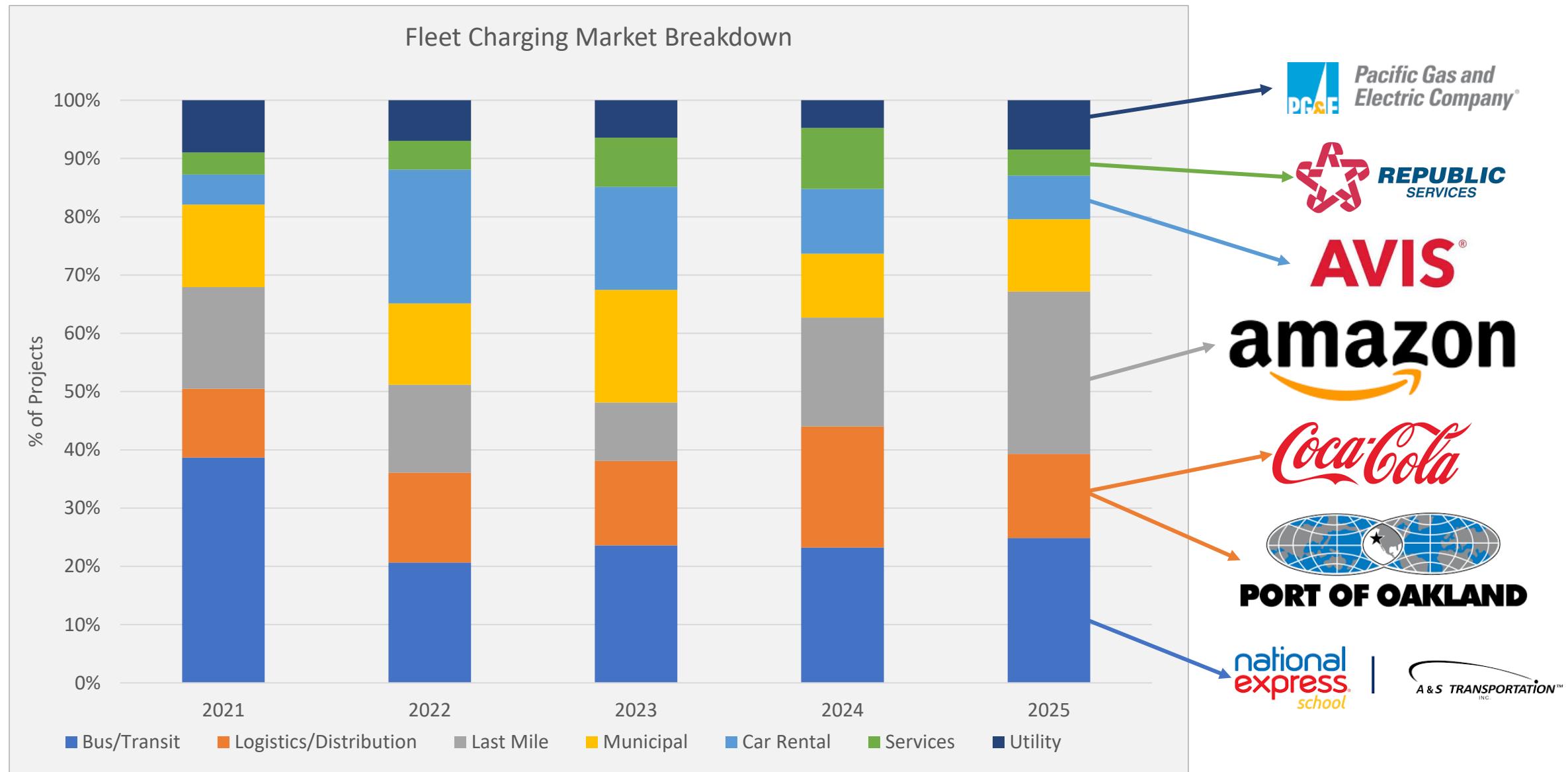


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# Takeaways and Outlook

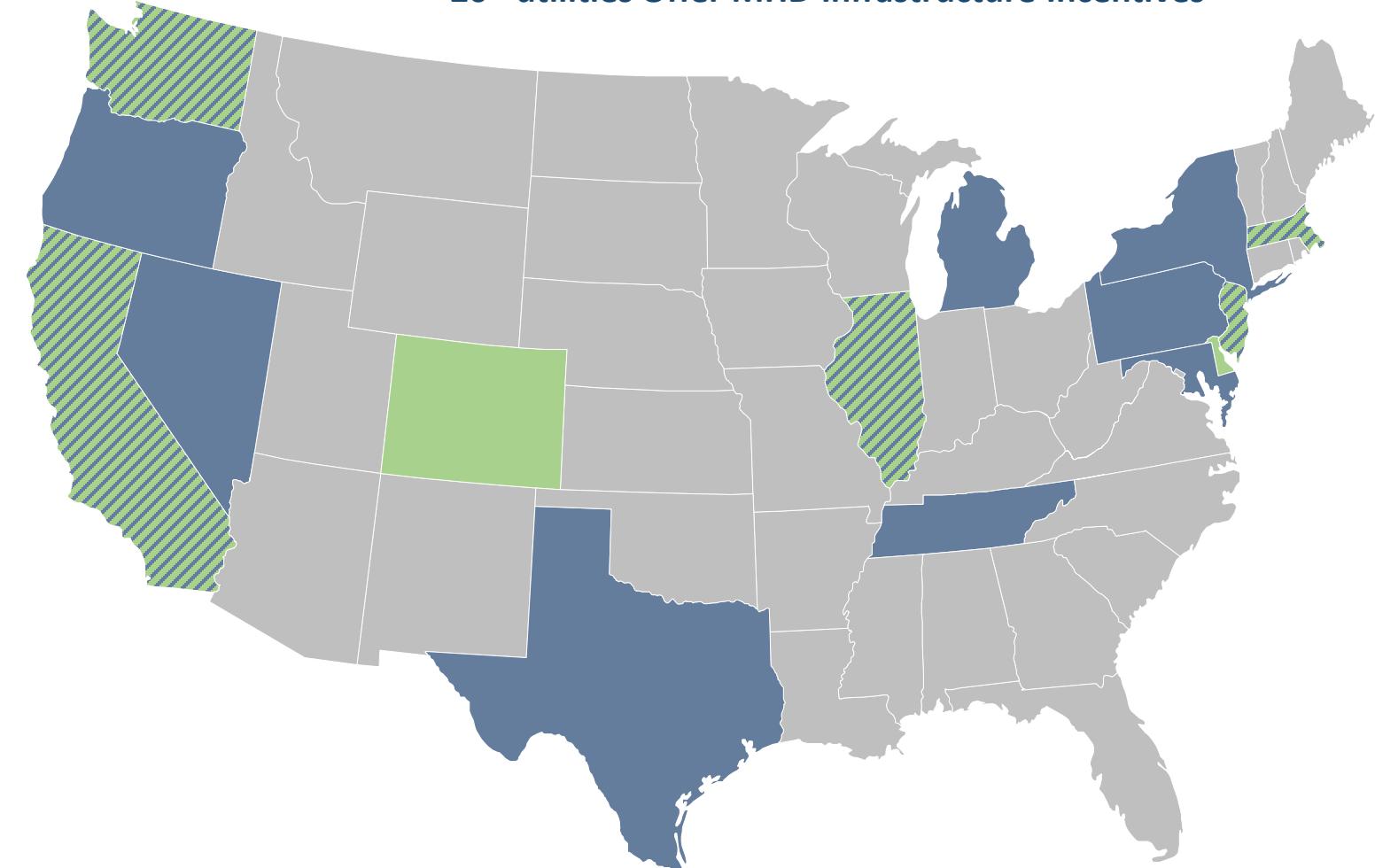
# Last Mile Electrification is 25% of Fleet Market

Ohm⚡ Analytics



# MHD Vehicle & Infrastructure State Incentives

- 13 States Offer MHD Vehicle Incentives
- 7 States Offer MHD Infrastructure Incentives
- 20+ utilities Offer MHD Infrastructure Incentives



## US – FTA No and Low Emission Bus Funding

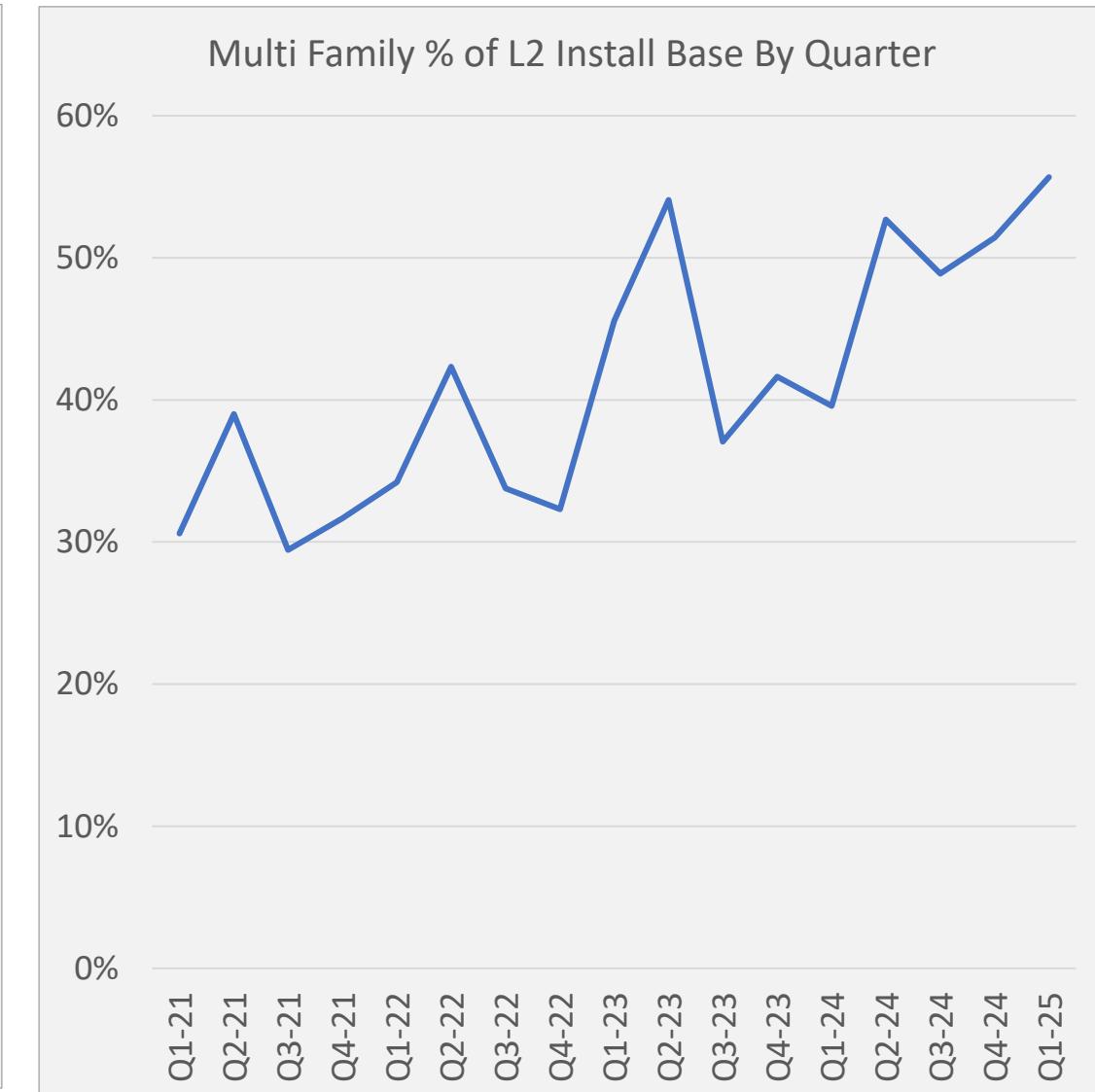
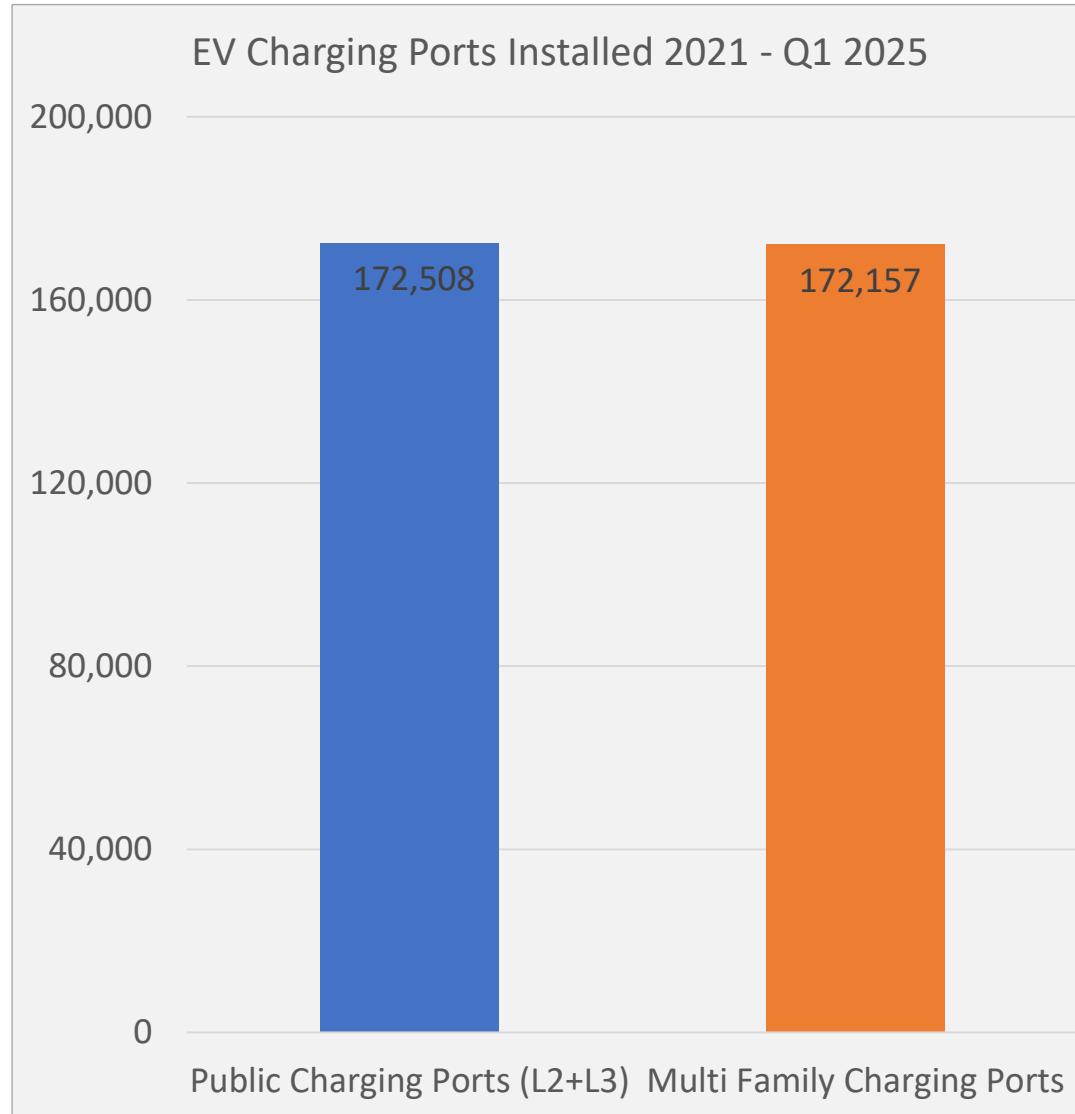
**7/14/25:** Federal Transit Authority offering \$1.5B in grants to replace transit buses with low-emission and zero-emission buses

Infrastructure Incentives

Vehicle Incentives

# Multi Family Overtakes Public Charging

Ohm⚡Analytics



# EV Ready Building Codes Drive Multi Family Charging Adoption

**Seattle, WA**

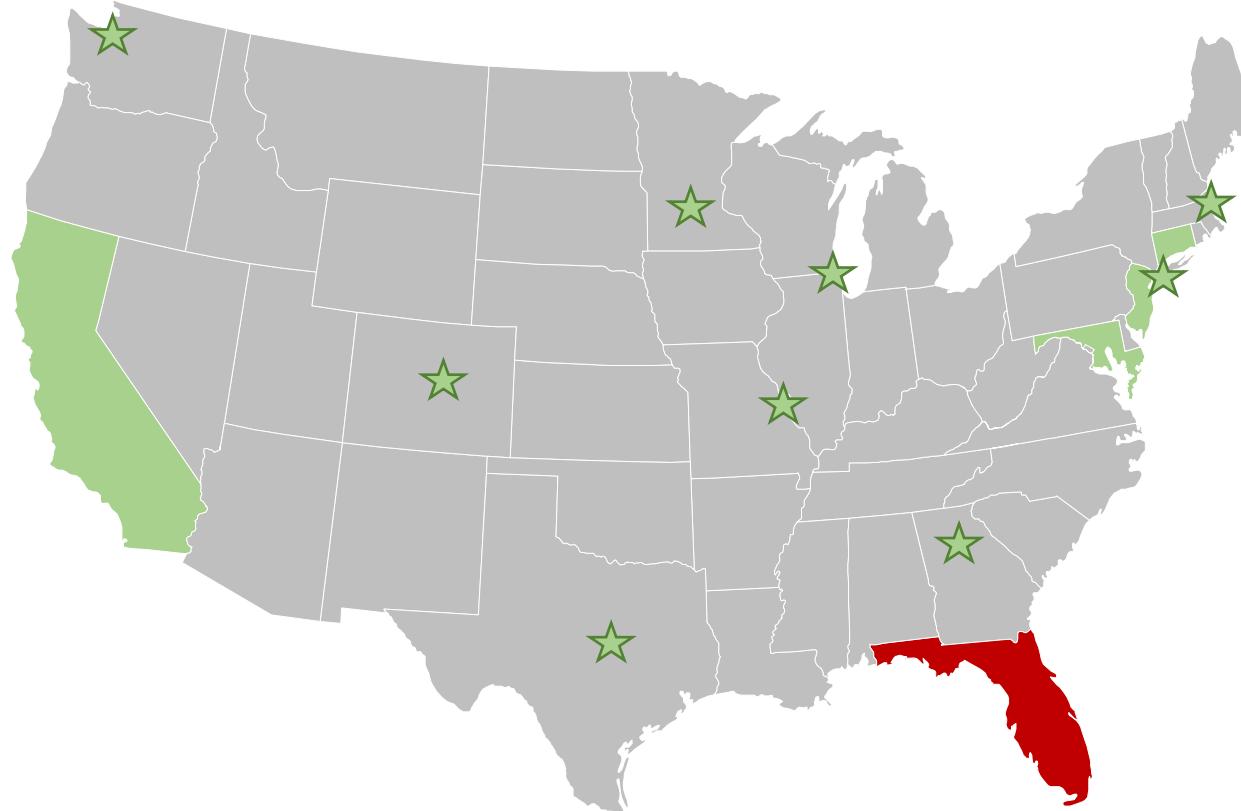
**2019:** New construction requires 6 spaces to be EVSE-ready in lots with 1-25 spaces and 20% EVSE-ready in lots >25 spaces.

**YoY MUD Ports Growth:** 305%  
**Total Installed MUD Ports:** 2,590

**California**

**7/1/24:** CALGreen building code requires EVSE and EVSE-ready infrastructure in new multi-family builds and increased requirements to 10% of spaces with EVSE installed and 40% EVSE-ready effective July 1, 2024.

**YoY MUD Ports Growth:** 56%  
**Total Installed MUD Ports:** 34,151



**Austin, Texas**

**4/10/25:** Multi family properties must have 40% of parking spaces ready as EV-capable spaces. Low power L2 (20A) solutions are accepted.

**New York City, NY**

**2035:** New York Local Law 55 requires EVSE at 20% of spots, 1 DCFC can be subbed for 10 L2 (up to 50% of spots), and EVSE-ready infrastructure at 40% of spaces for existing buildings with 10+ spaces by Jan. 1, 2035. New construction requires EVSE at 20% of spaces and EVSE-ready at 60% of spaces.

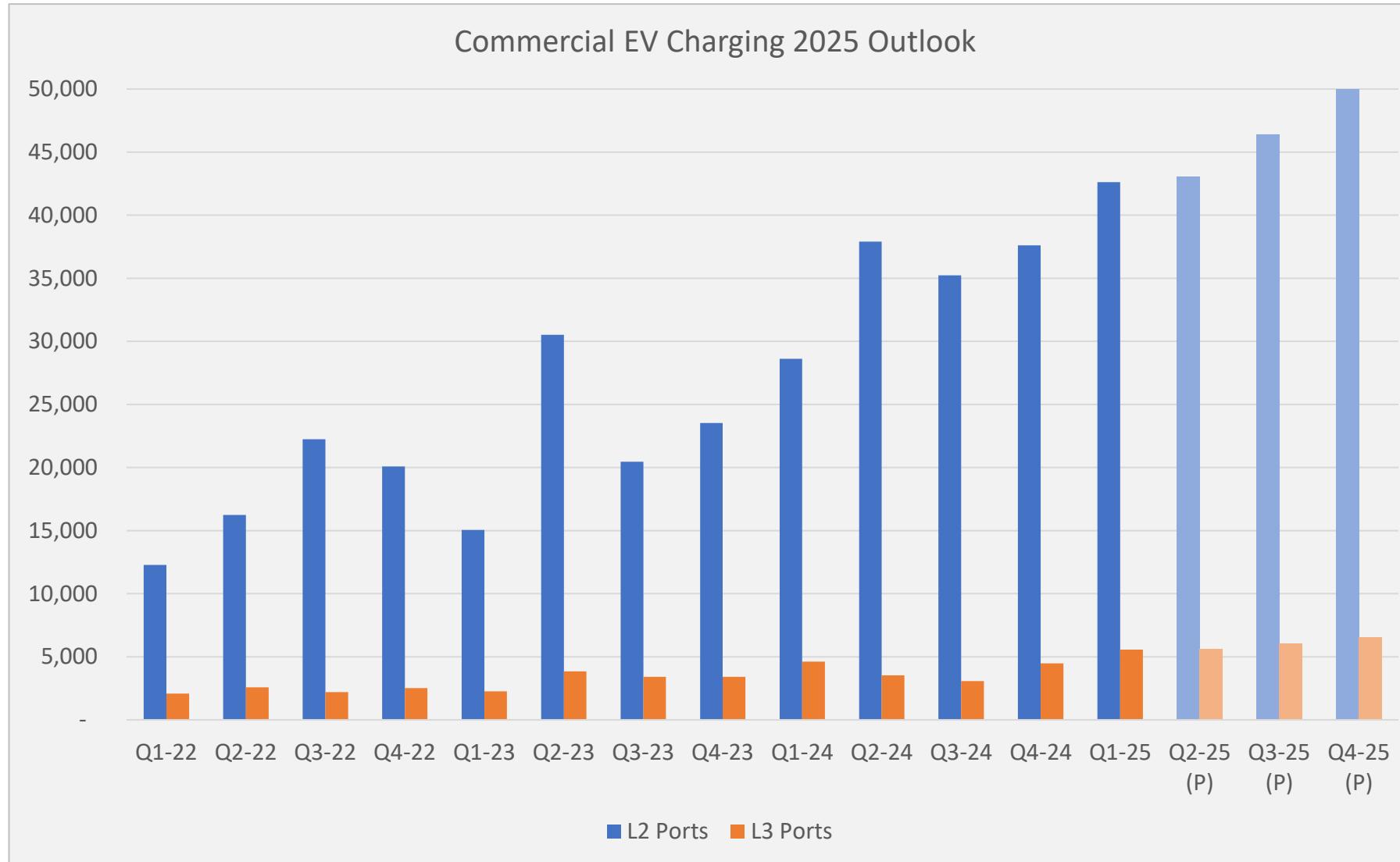
**YoY MUD Ports Growth:** 53%  
**Total Installed MUD Ports:** 6,384

**Florida**

**5/1/24:** Florida passed a law that prohibited cities from regulating EVSE and all regulations will be done at the state-level effective 5/1/24. Cities with existing EV-ready requirements, like Miami, will be repealed.

**YoY MUD Ports Growth:** 433%  
**Total Installed MUD Ports:** 1,620

# How do we Maintain Our Pace?



## 2025 Outlook

- 182k L2 Ports
- 23k DCFC Ports

## Key Themes

- Chargers that work
- Energy management
- Last mile, multi family, new DCFC networks



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# Q&A