

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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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

TESLA

SIEMENS

AUTEL®

 Epic Charging

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 everge

 ORANGE

 MONTERRA

 Rexel


MILLER ELECTRIC COMPANY

 sonepar

 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

Agenda

Overall Market Trends & Volumes

Policy & Programs Outlook

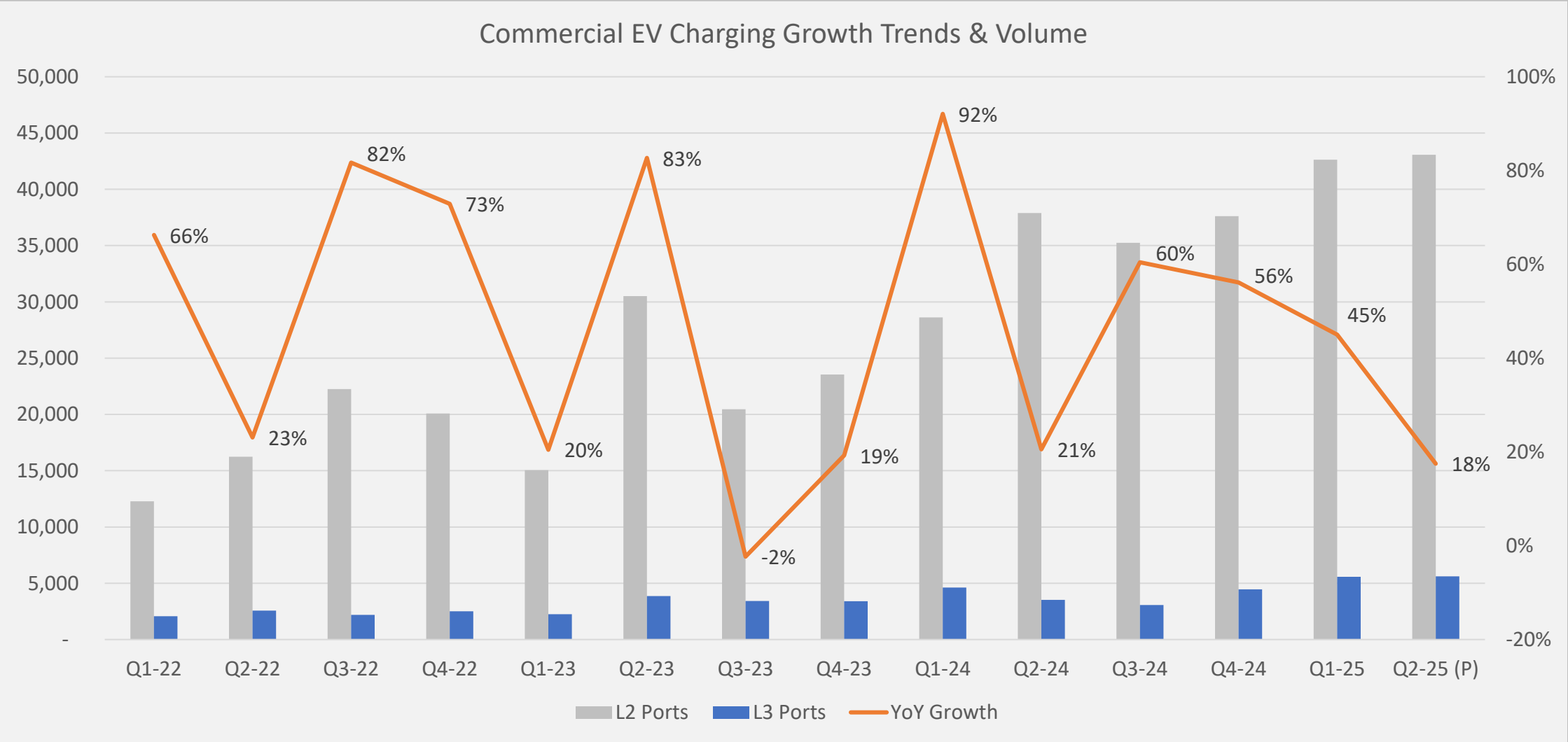
Changing Market Dynamics

Takeaways and Outlook

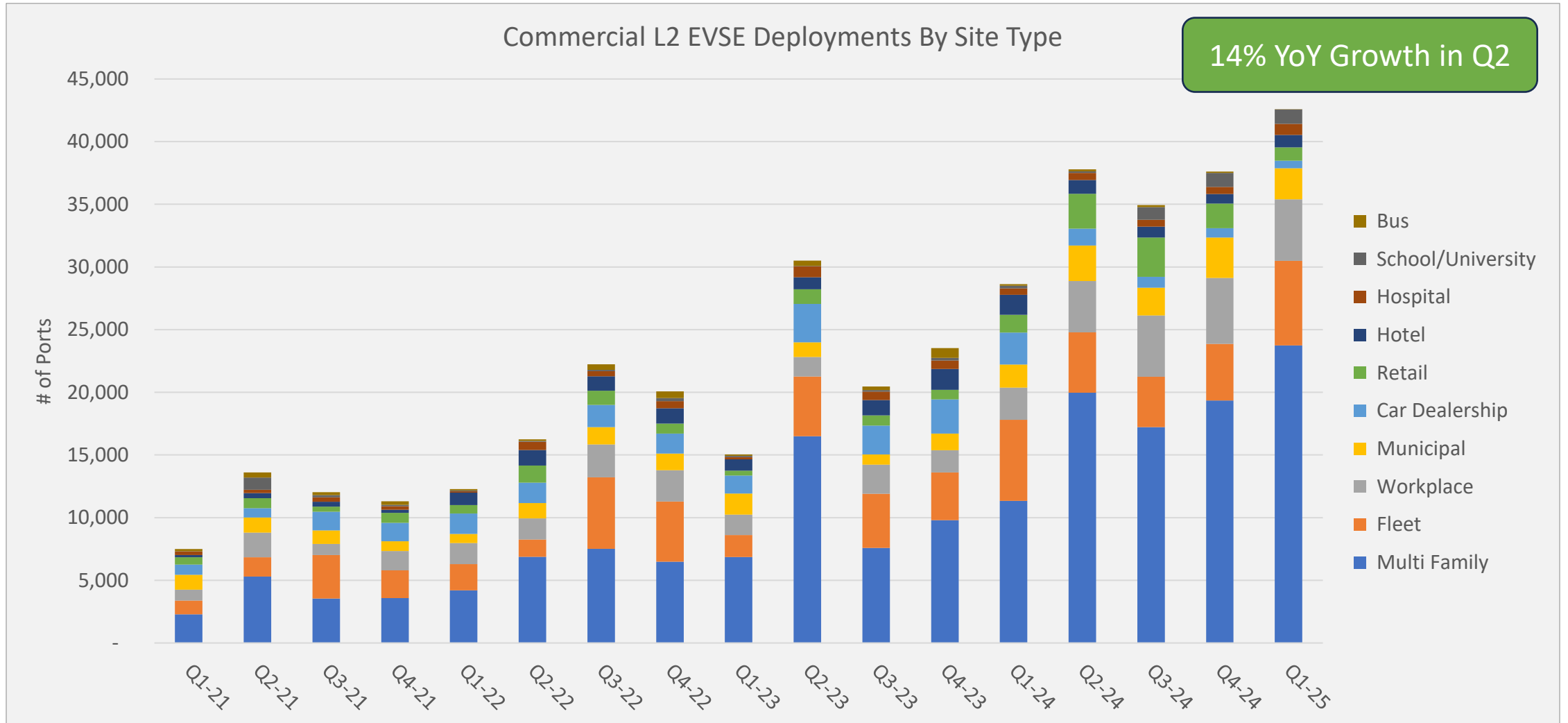
Q&A

Current Landscape

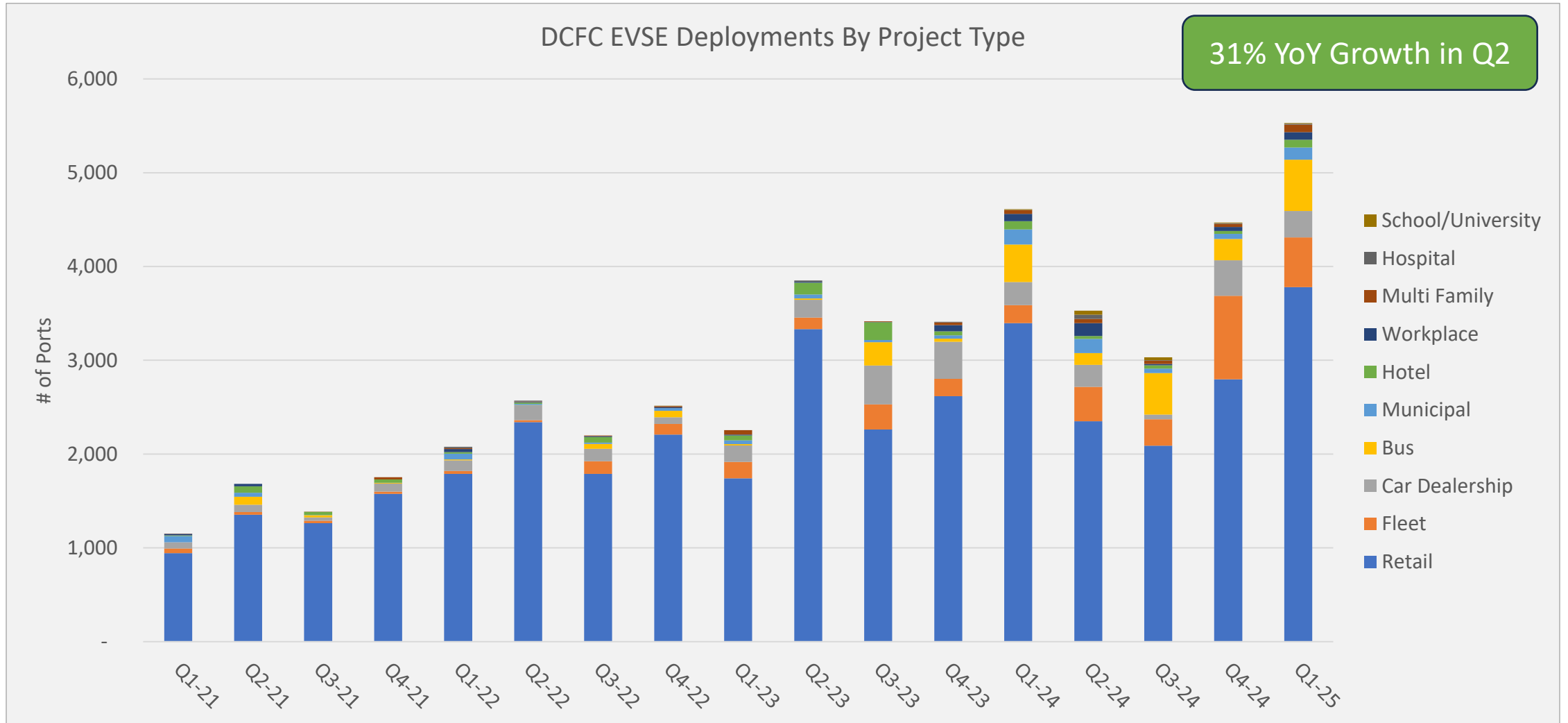
Positive Momentum: 18% Growth YoY in Q2



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



Multi Family

Workplace

Fleet

Fast Charging

100M Apartments at Grand Park

6/12/35: Gurtz Electric installs 23 L2 chargers an apartment complex



GURTZ
ELECTRIC CO.

Green Water and Power

6/3/35: Green Water and Power installs 10 L2 chargers at 1407 on Michigan, making IL the 10th and latest state they have installed in




GREEN WATER AND POWER

Old Post Office Garage

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



THE
601W
COMPANIES

Costco

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



Dynamic Electric, Inc.
12800 South Cicero
Alsip, Illinois 60803-3044
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

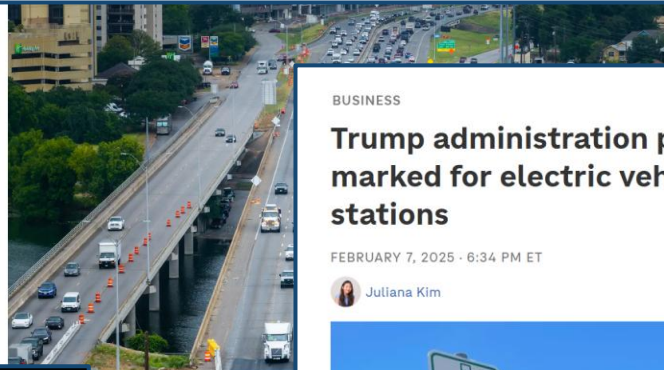
Policy Outlook

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.



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

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

[in](#) [f](#) [x](#) [p](#) [e](#) [r](#)



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

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% electric school buses at the Zum/OUISD 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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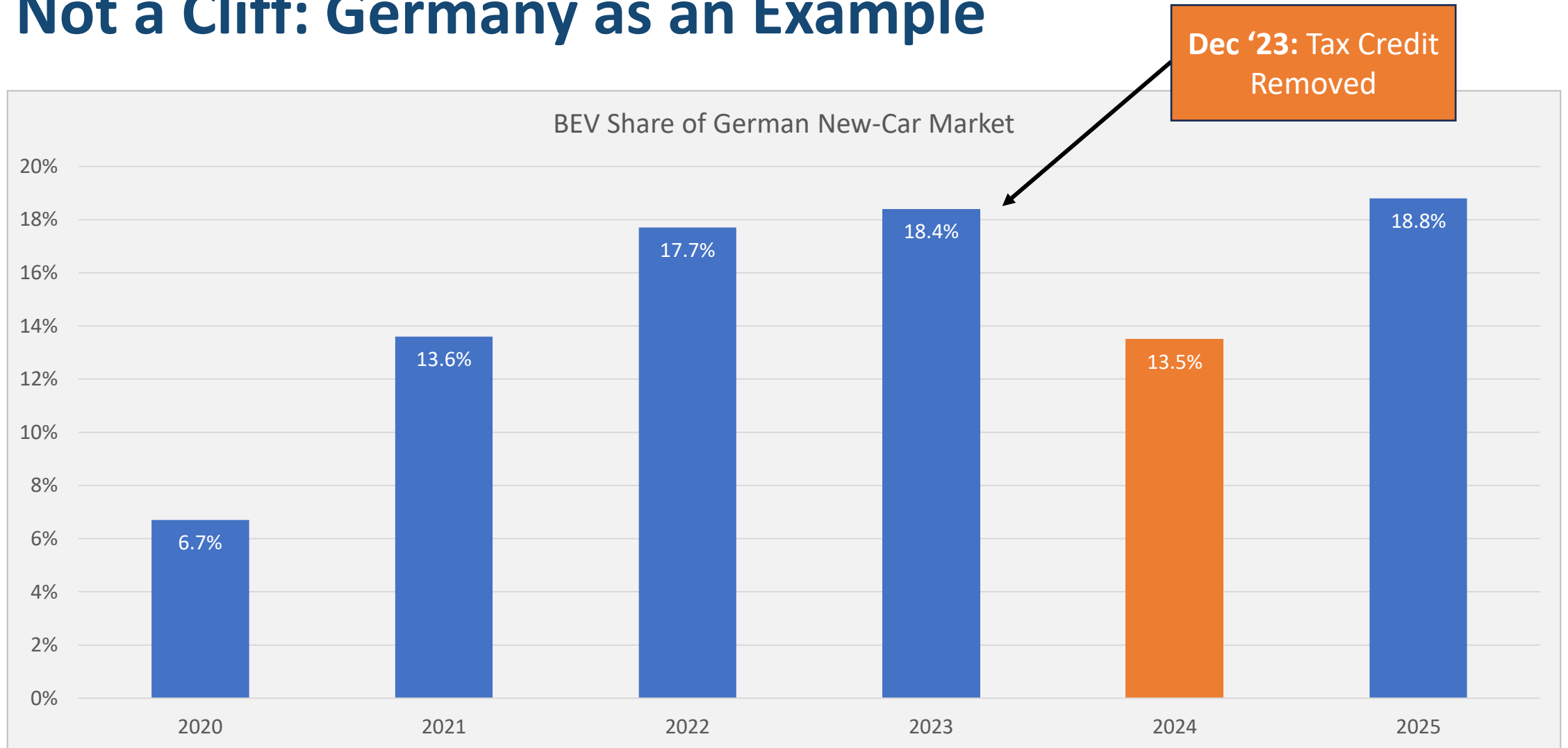
FUEL SMARTS

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

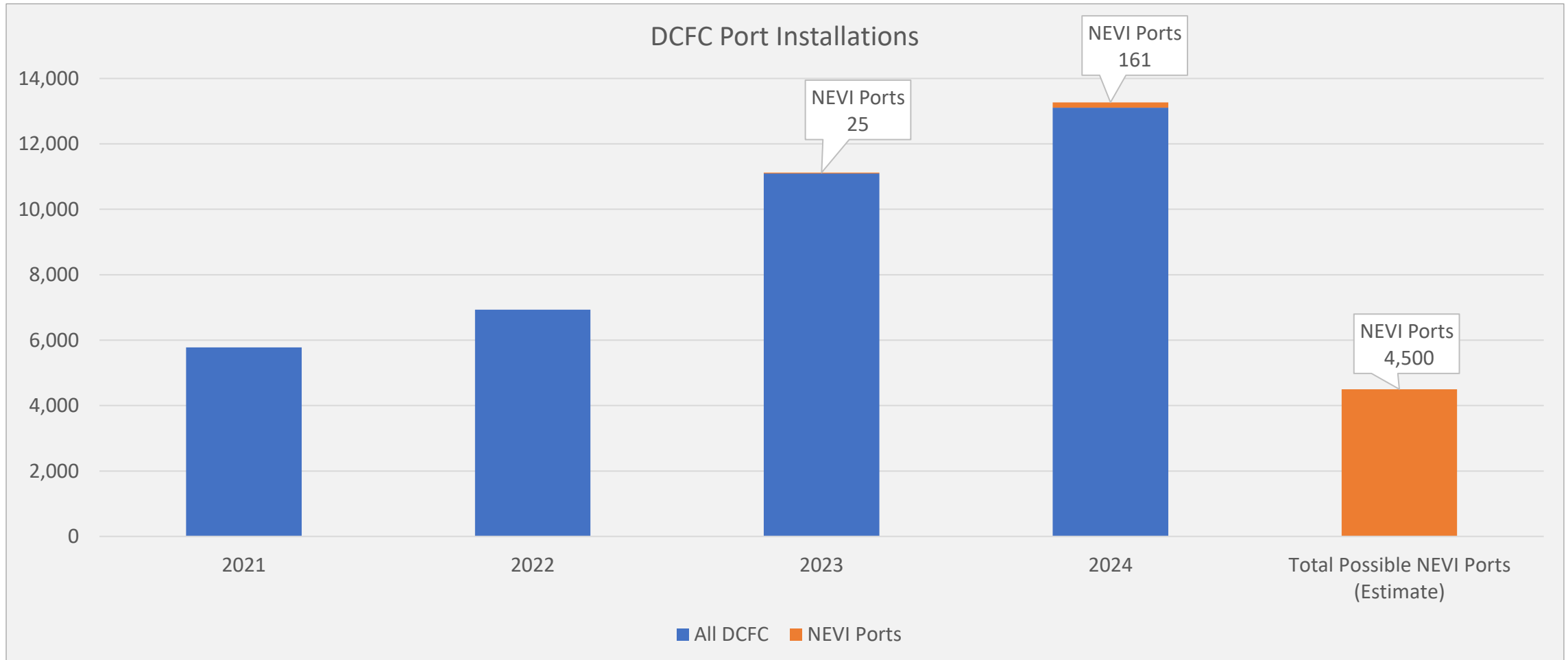
June 12, 2025 • By Deborah Lockridge • 

[f](#) [x](#) [in](#) [e](#) [r](#)









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

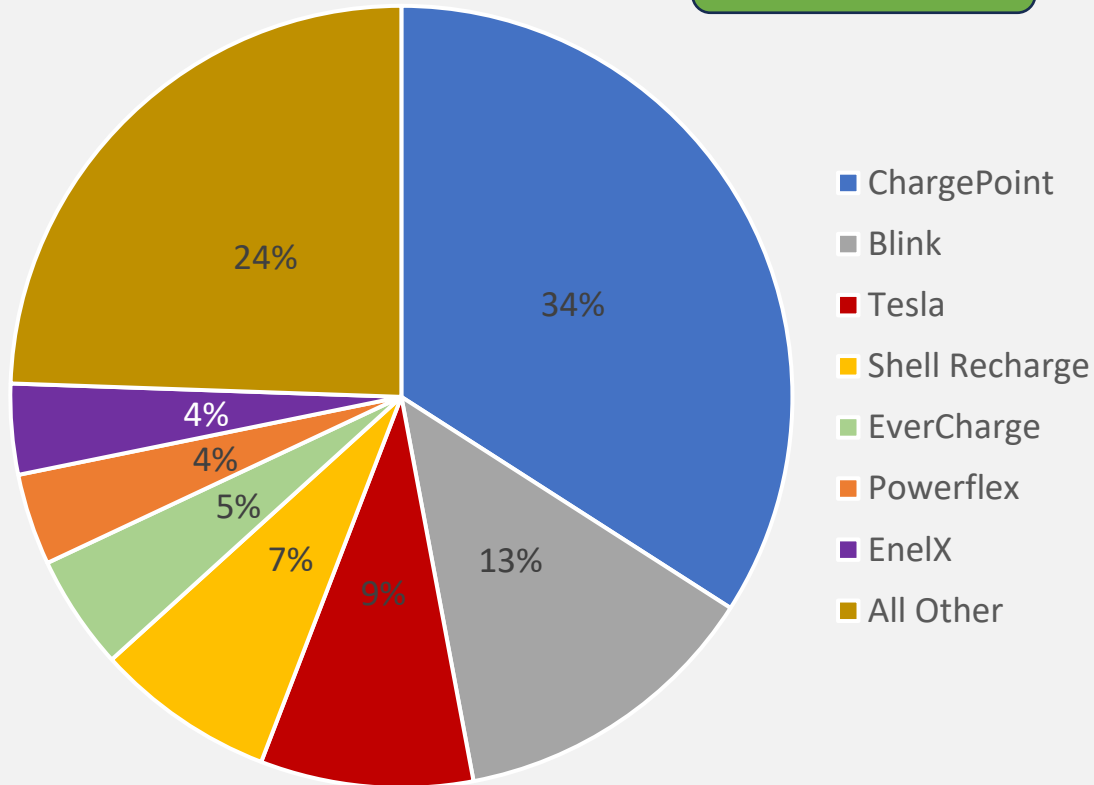
 comed SM AN EXELON COMPANY	\$100M	Increased Rebate	 chargeup New Jersey	\$9.9M	Open
 JOINT UTILITIES OF NEW YORK	\$885M	Increased Rebate	 NEW YORK STATE OF OPPORTUNITY.	NYSERDA \$12M	Open
 LA DWP Los Angeles Department of Water & Power	\$127M	Only MHD Open	 COMMUNITIES IN CHARGE	\$56.5M	Upcoming
 Xcel Energy TM	\$105M	Open	 COLORADO Energy Office	\$3M	Closed

Shifting Market Dynamics

The Industry is More Diverse and More Open

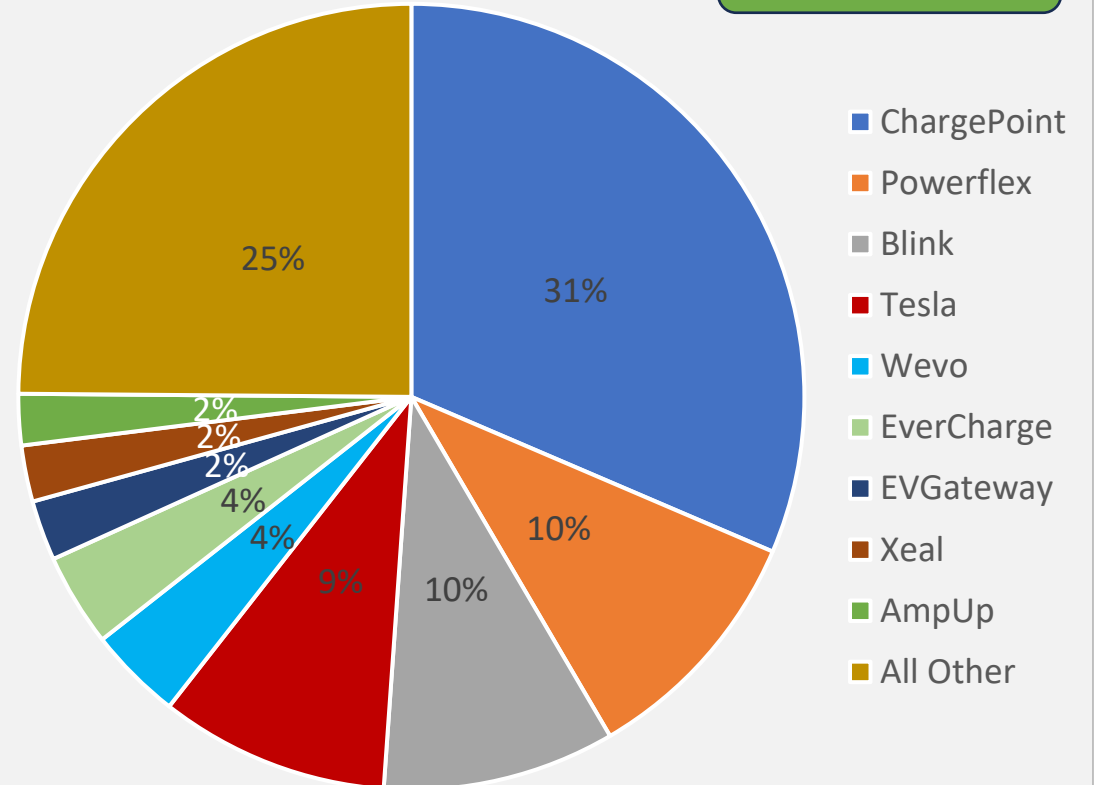
L2 Ports Under Management Top 75% - Jan 1, 2024

40% OCPP



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

50% OCPP



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

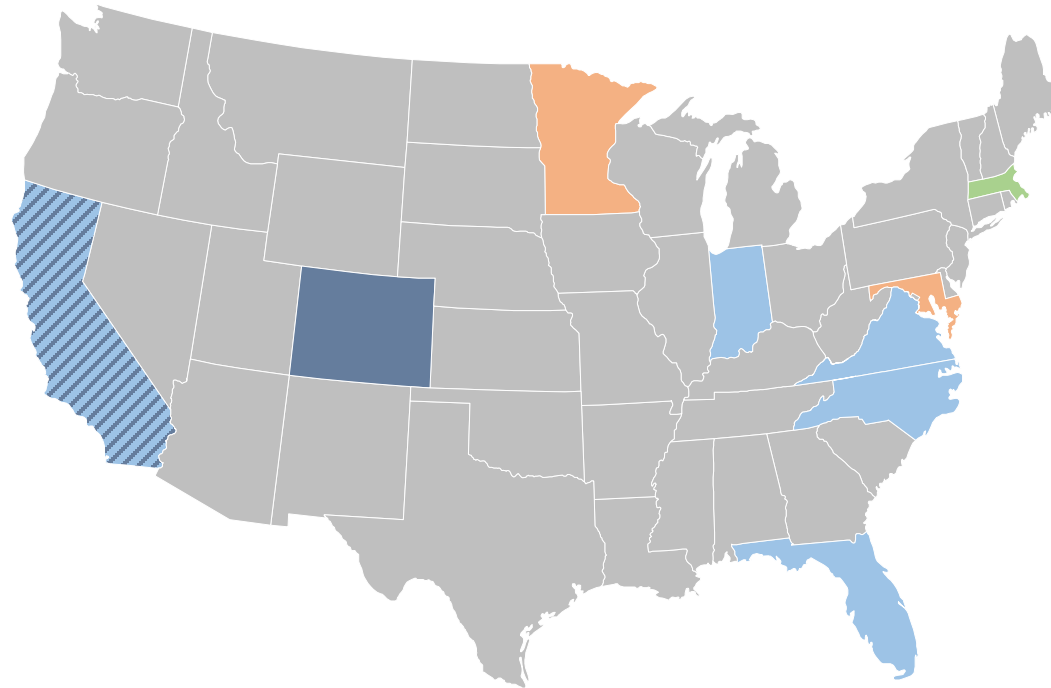
6/28/25: Dutch Creek Electric LLC replaces 14 Enel X Juice Box chargers with Lynkwel chargers across 2 workplace properties in Denver

Multi Family

Workplace

Fleet

Public Charging



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

FL: ChargePoint Municipal Projects

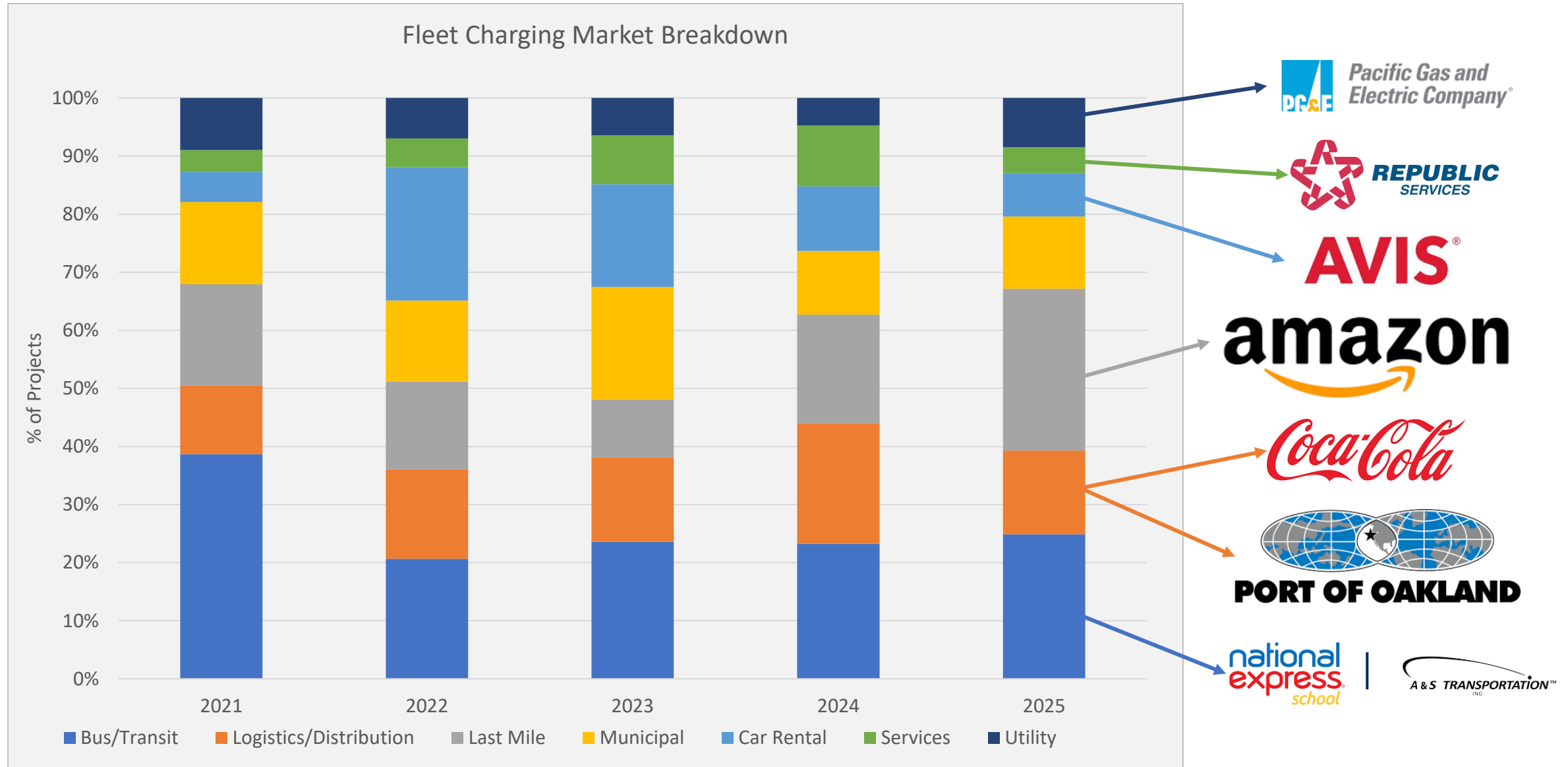
1/29/25: Computer Power Systems replaces 4 ChargePoint L2 chargers for the town of Largo.

NC: EnviroSpark Replacement

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

Takeaways and Outlook

Last Mile Electrification is 25% of Fleet Market

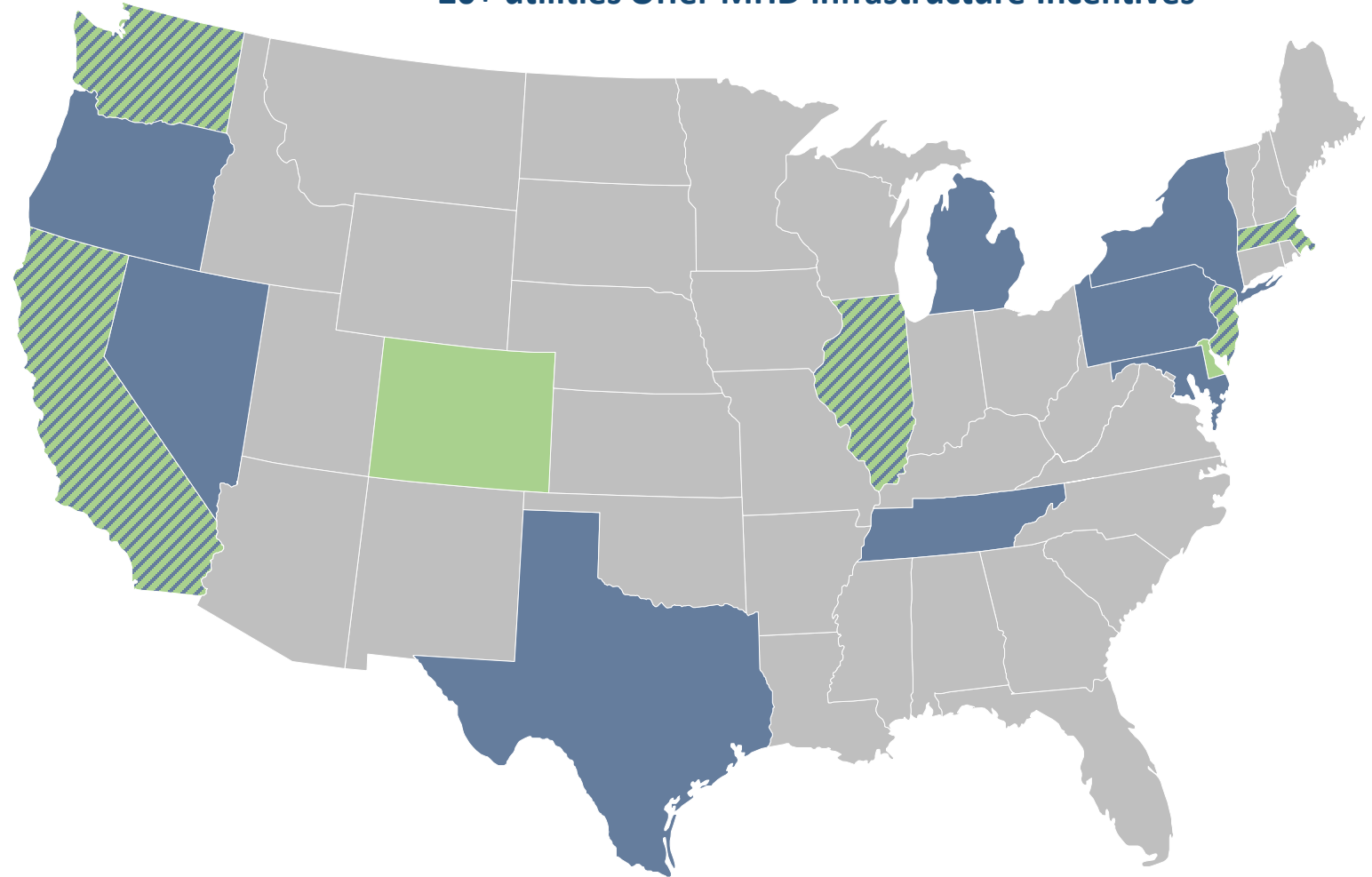


MHD Vehicle & Infrastructure State Incentives

- 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

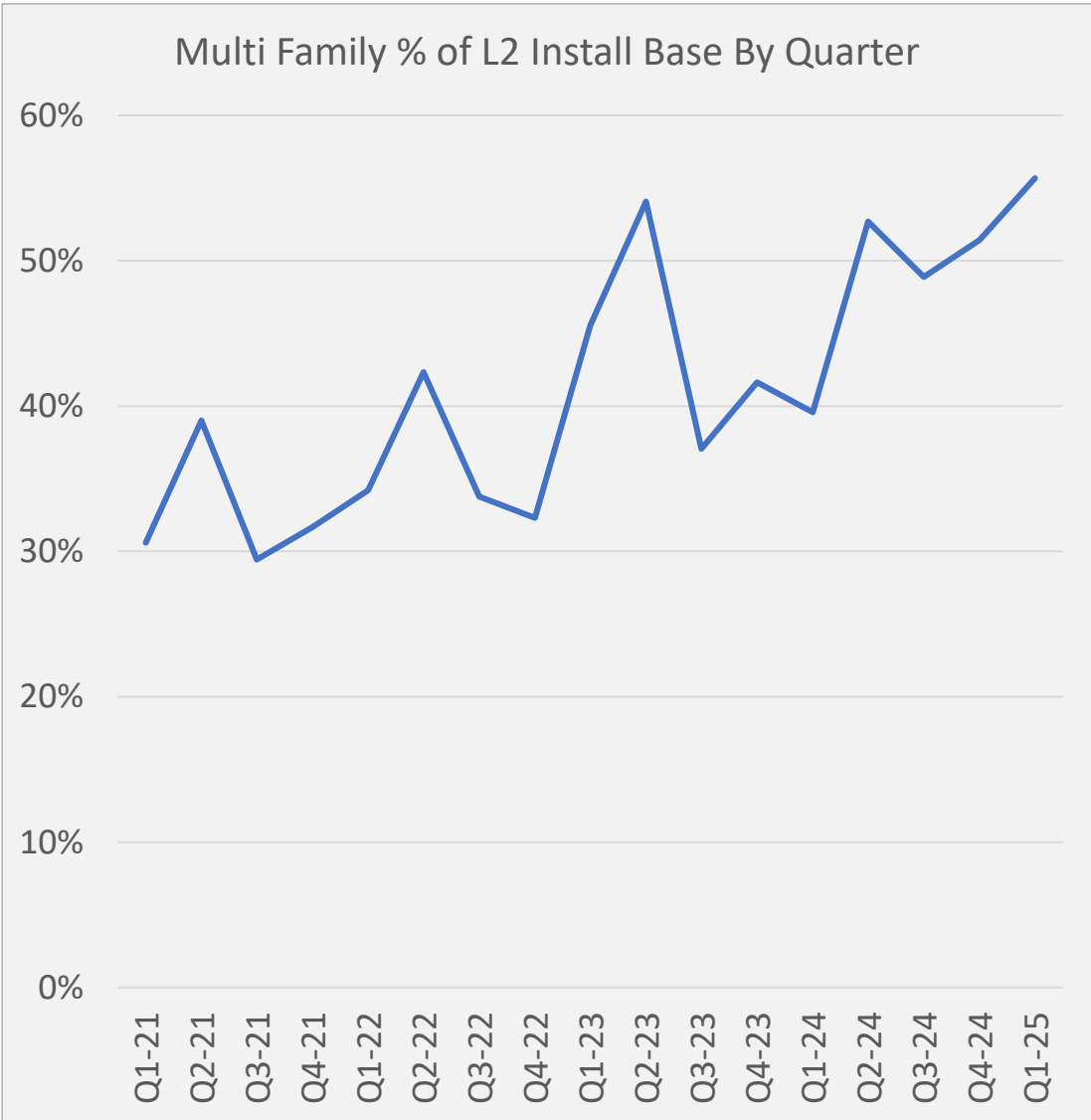
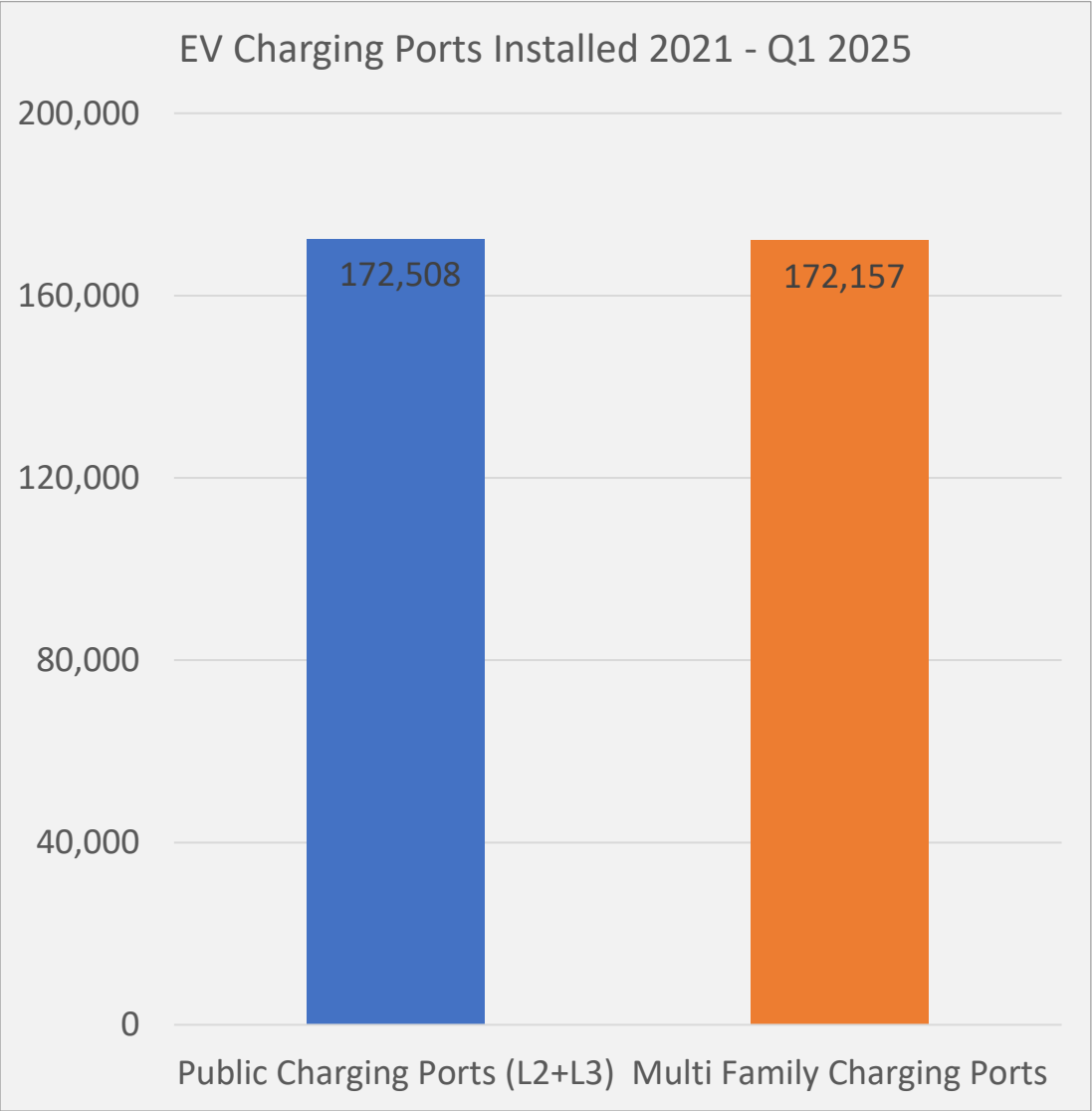
7/14/25: Federal Transit Authority offering \$1.5B in grants to replace transit buses with low-emission and zero-emission buses



Infrastructure Incentives

Vehicle Incentives

Multi Family Overtakes Public Charging



EV Ready Building Codes Drive Multi Family Charging Adoption

Seattle, WA

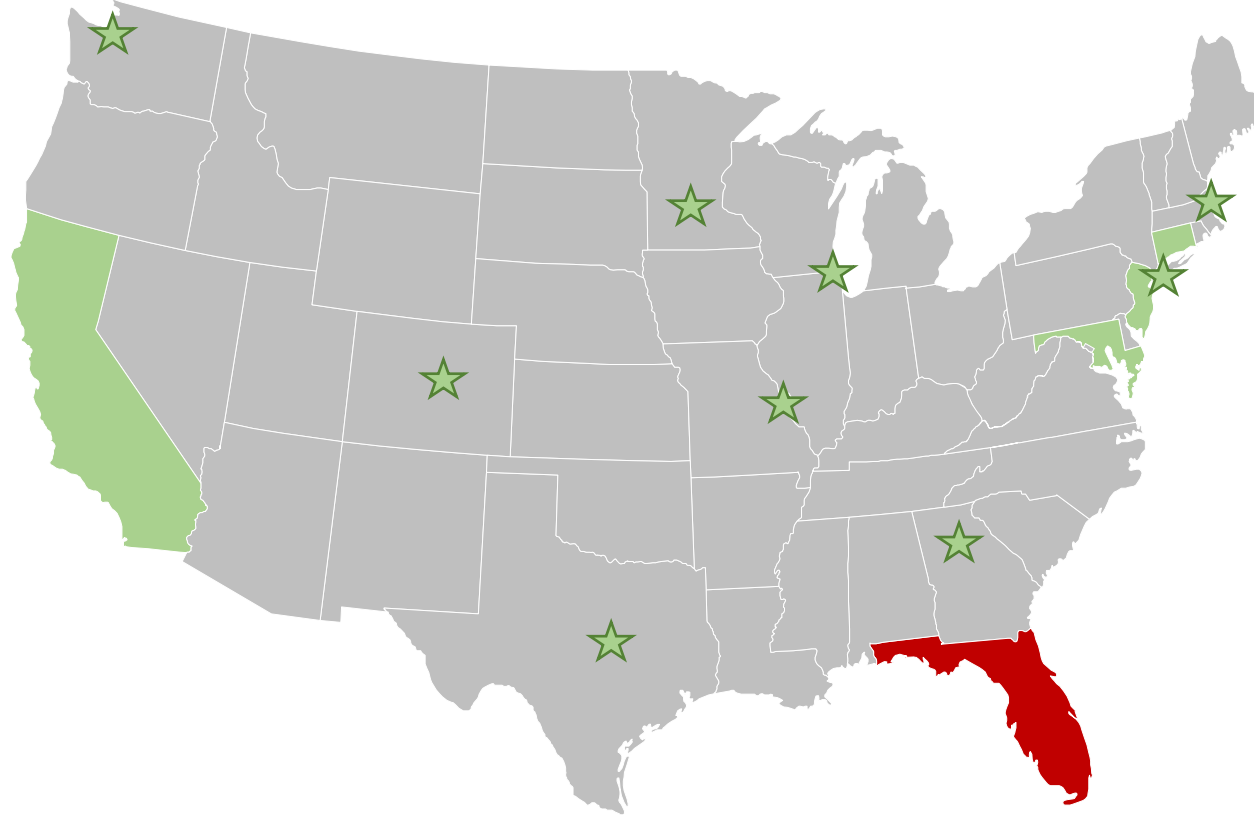
2019: New construction requires 6 spaces to be EVSE-ready in lots with 1-25 spaces and 20% EVSE-ready in lots >25 spaces.

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



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

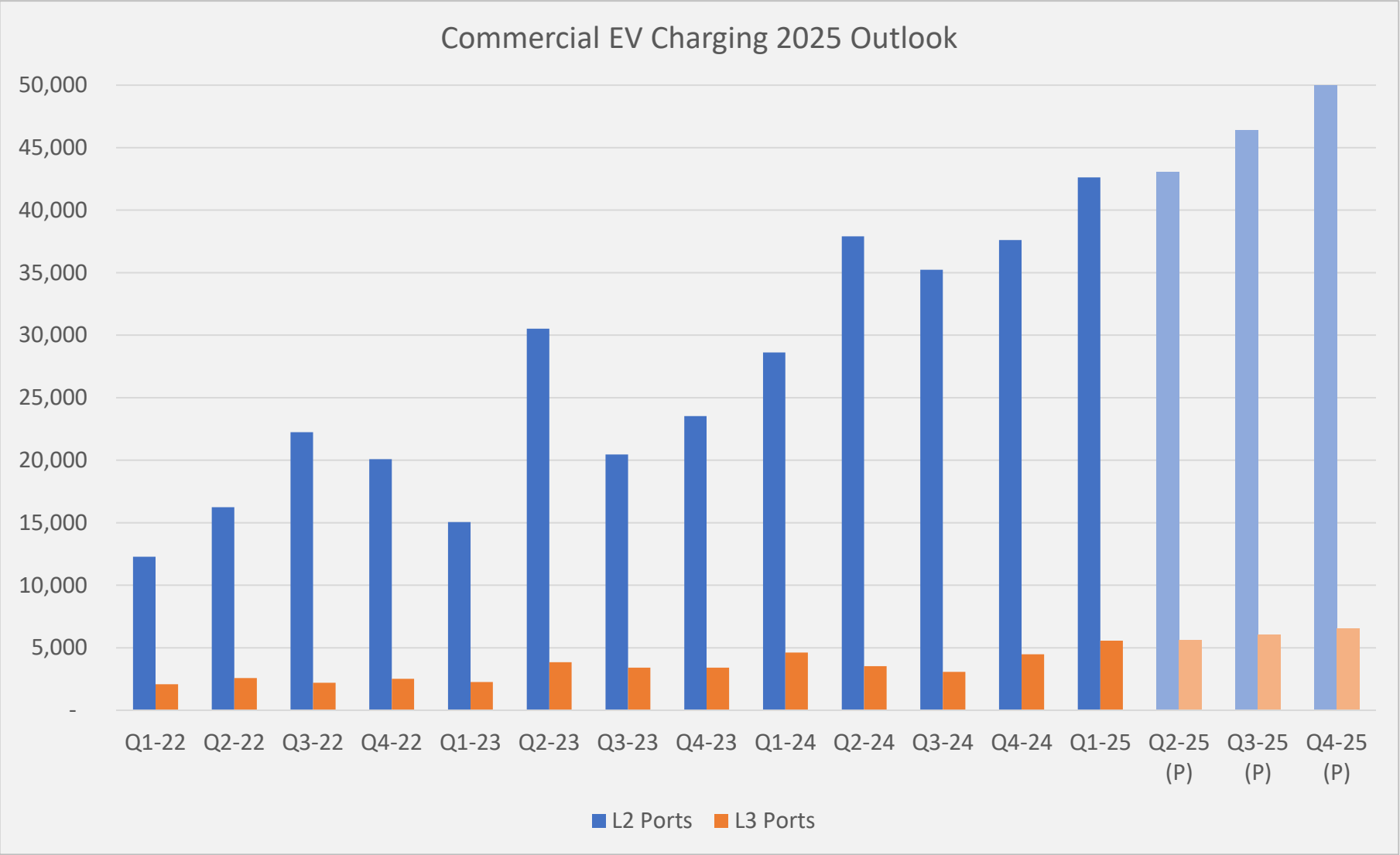
5/1/24: Florida passed a law that prohibited cities from regulating EVSE and all regulations will be done at the state-level effective 5/1/24. Cities with existing EV-ready requirements, like Miami, will be repealed.

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

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.

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

Q&A