



EV CHARGING REPORT

State of the EV Charging Industry

A comprehensive look at reliability, utilization and network growth across the U.S. fast-charging landscape.

Q3 2026 EDITION

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ABOUT THIS REPORT

The State of the Industry report is Paren's quarterly deep-dive into U.S public fast charging — tracking infrastructure growth, network reliability, operator market share, deployment and pricing trends. We publish it free of charge to give the industry a shared, standardized view of the data. It is independent work: not sponsored, and not affiliated with any charge point operator or automaker.

Data reflects all publicly accessible DCFC ports in the U.S., updated daily — Paren monitors more than 98% of the U.S. DCFC infrastructure in real time. In this edition, we've also given the floor to a leading industry expert to share their perspective on where the market is heading. We hope you enjoy the report.

Building Charging Confidence

The next stage of industry growth must focus on delivering an experience without angst

The most important measure of progress in public EV charging is whether drivers feel comfortable using it—and confident that they won't have a problem.

My recent experience using DC fast chargers across many networks, combined with Paren's Q3 2026 findings, gives me reasons to believe the industry is building that confidence, even as the data reminds us that improvement is neither automatic nor uniform.

When I started driving an EV in 2009, there wasn't a single public charging station in New Jersey. In 2013, the first generation of 50 kW DC (semi)fast chargers appeared, which seemed incredibly fast back then.

Still, failed sessions and inconsistent performance shifted EV drivers' concern from range anxiety to charger anxiety. Over the years, as higher-powered chargers were introduced, reliability barely improved.

For a first-time EV driver, a failed public charging session can be a reason to regret getting an EV – or even to get rid of it. Public charging must work for people who have no interest in troubleshooting equipment or becoming experts in charging networks. Tesla was the first network to largely solve reliability issues and build charging confidence with its large sites. But now, overall industry charger reliability sits at just under 94%.

Public charging must work for people who have no interest in troubleshooting equipment or becoming experts in charging networks.

Higher power also means shorter dwell times. Across all networks, 73% of new charging ports can deliver at least 250 kW. Beyond more reliable, higher-powered equipment, this quarter's shift toward larger stations is especially encouraging.

New non-Tesla sites averaged five charging stalls; that's a 22% increase from last year, and less than 33% of new sites had only two or one stall – and that number continues to shrink.

I'm optimistic because I've seen the industry address many of the problems that plagued the early adopters. Higher-power chargers, larger locations, and more competition are gradually removing charger anxiety. The next opportunity is to turn that progress into something drivers can take for granted: arriving, plugging in, and getting on with their day without angst.

That is how better charging can help bring more people into electric vehicles and create charging confidence.



Tom Moloughney is the host and creator of the YouTube channel State Of Charge.

Tom Moloughney

Host and creator of the YouTube channel, [State Of Charge](#) and owner of [EVChargingStations.com](#)

Q3

2026 EDITION

State of the US Fast Charging
Industry Report

Industry Snapshot

Source: Paren US DCFC Data Sets

Utilization Rates

US Average



Q2 2026

Q3 2026

DCFC Session Volume

Quarterly Sessions, Q3 2026

50.4M▲

45.8M in Q2 2026

Reliability Score

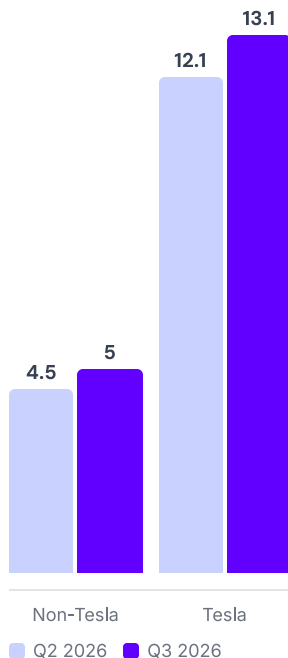
US Average, Q3 2026

93.9

93.9 in Q2 2026

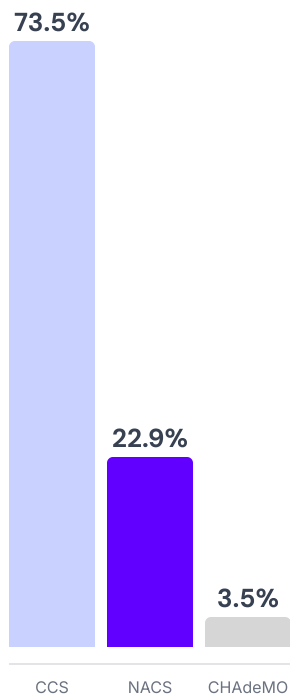
Ports Per Station

US Avg, Q2 2026 vs Q3 2026



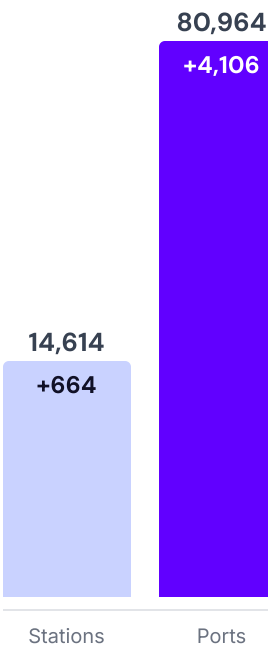
Port Types Deployed

Q3 New, Non-Tesla



Network Expansion

Total & Added, Q3 2026



Price Per kWh

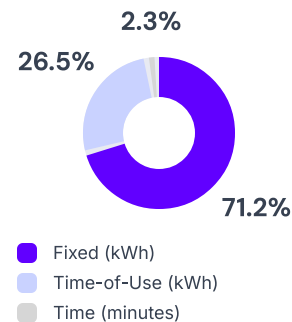
US Average, Q3 2026

\$0.540▲

\$0.538 in Q2 2026

Pricing Models

% of Stations, Q3 2026



01

SECTION

SECTION 01

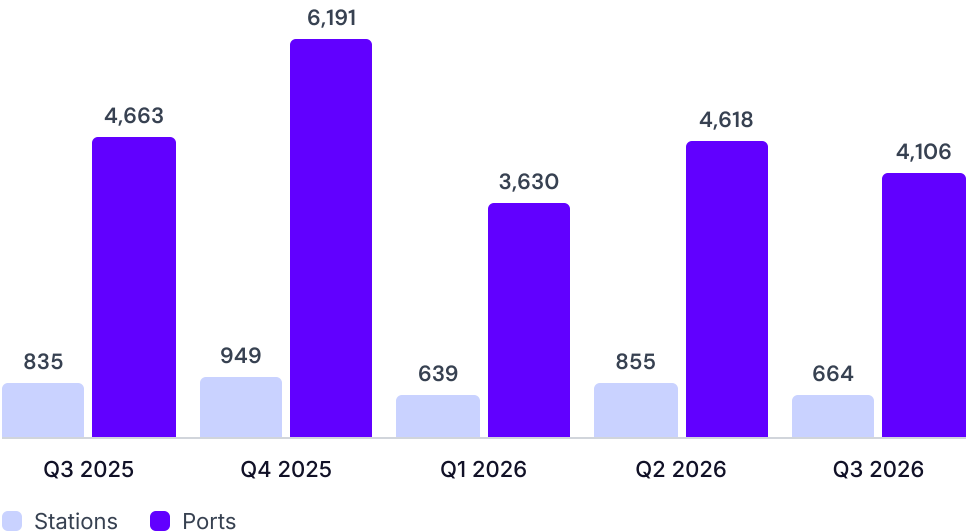
Charging Infrastructure Expansion

How many DCFC stations and ports opened in Q3 2026, where they are, and what power levels they deliver to drivers.

The US Now Has More Than 80,000 Fast-Charging Ports, Even As Q3 Deployment Slowed

New Public DCFC Stations & Ports
Stations vs. Ports

Source: Paren



4,106 new DCFC ports added, Q3 2026

664 new stations added, Q3 2026

Key Insights

NOTE We've updated our methodology to more accurately capture operating stations. See Appendix B for more details.

The US added 664 new DCFC stations and 4,106 ports in Q3 2026, bringing the national network to 14,614 stations and more than 80,000 fast-charging ports for the first time.

A SLOWER Q3 ECHOES THE PATTERN SEEN IN 2025

Port deployment followed the same pattern in both years: a slower Q1, a Q2 peak, then a dip in Q3. In 2025, the dip was followed by the strongest quarter of the year, with 6,191 ports opened in Q4. We expect a similar push through the final weeks of 2026.

NETWORKS SPEEDING UP, NETWORKS SLOWING DOWN

Ionna more than doubled its Q2 rollout, including the transformation of 44 former Circle K stations. Walmart held close to its Q2 peak after scaling up over the past year, and Vialynk more than doubled its best prior quarter. Others pulled back: Pilot Flying J, Mercedes-Benz HPC and Red E all added noticeably fewer ports than in recent quarters.

FEWER STATIONS AND PORTS THAN LAST YEAR, BUT BIGGER SITES

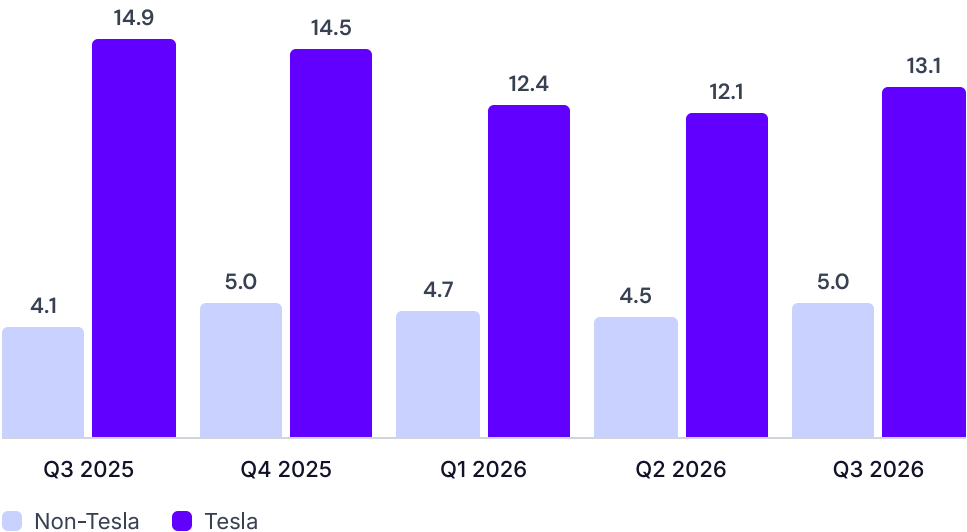
Every quarter of 2026 has opened fewer stations than the same quarter of 2025. Through Q3, operators opened 2,158 stations, about 20% fewer than the 2,696 opened through Q3 2025. Ports fell by about half as much: 12,354 so far this year, about 9% below last year's 13,600. Fewer sites are opening, but on average, each one is larger.

New Stations Are Getting Bigger, Led By Non-Tesla Networks

Ports per Station

Non-Tesla vs. Tesla Networks

Source: Paren



Key Insights

New non-Tesla sites averaged 5.0 ports this quarter, up from 4.1 a year ago. Sites with just one or two ports now make up under a third of non-Tesla openings, down from nearly half a year ago.

ELECTRIFY AMERICA AND BP PULSE ANCHOR THE SHIFT

Electrify America, bp pulse and Vialynk opened the largest non-Tesla sites this quarter, at 20 ports or more. Electrify America opened its largest site ever, with 24 ports, four more than its indoor San Francisco location. ChargePoint and Blink continued to build mostly small sites: 71% of ChargePoint's and 74% of Blink's sites with new Q3 ports had two ports or fewer.

TESLA: A WAVE OF BIG SUPERCHARGERS, NOT ONE OUTLIER

Tesla's new Supercharger sites averaged 13.1 ports, up from 12.1 in Q2. It opened 11 Superchargers with 24 or more stalls, nearly three times as many as in Q2, led by a 48-stall site in Fort Lauderdale, FL, with most of the others in Southern California.

Ionna Jumps, Walmart Holds Pace, Tesla's Share Of New Ports Shrinks

Top 10 CPOs by New Ports — Q3 2026

Source: Paren

Total ports & market share by operator

CPO/NETWORK	Total Ports		Market Share	
	Q3 2026	All Time	Q3 2026	All Time
Tesla	1,287	39,952	31.3%	49.3%
Ionna	378	1,575	9.2%	1.9%
Walmart	344	964	8.4%	1.2%
Red E	202	2,174	4.9%	2.7%
Electrify America	186	5,357	4.5%	6.6%
ChargePoint	169	4,774	4.1%	5.9%
Vialynk	152	465	3.7%	0.6%
EVgo	136	3,997	3.3%	4.9%
Tesla Supercharger for Business	124	402	3.0%	0.5%
EVOLV Charging	94	590	2.3%	0.7%
Other Networks	1,034	20,714	25.2%	25.6%
Total	4,106	80,964	100%	100%

1,287

new ports added by Tesla in Q3 2026 — still #1, up from 1,193 in Q2

378

new ports added by Ionna in Q3 2026 — up 108% from Q2, 34 ports ahead of Walmart for #2

Key Insights

Tesla still added more new ports than any other network in Q3, 1,287, representing a 31.3% share of new ports. Including the 124 ports at its Supercharger for Business sites, Tesla added 1,411, or 34.4%. Ionna added 378 new ports, up from 182 in Q2, moving it from seventh to second, ahead of Walmart (344).

TESLA KEEPS BUILDING, THE MARKET BUILDS FASTER

Tesla opened 1,744 new ports in Q3 2025, 37.4% of the quarter's total. A year later, it opened 1,287, or 31.3%. Over the same period, Tesla's share of all US fast-charging ports slipped from 54.3% to 49.3%. Tesla's network keeps growing, adding about 5,700 ports over the year, but the rest of the market added more than twice as many.

CIRCLE K SITES BECOME IONNA SITES

Much of Ionna's jump comes from converting the Circle K charging sites it acquired earlier this year. Under our methodology, when a network replaces chargers at a site previously operated by another network, those ports count as new infrastructure. When a network replaces chargers at its own site, only ports added beyond the original count are treated as new.

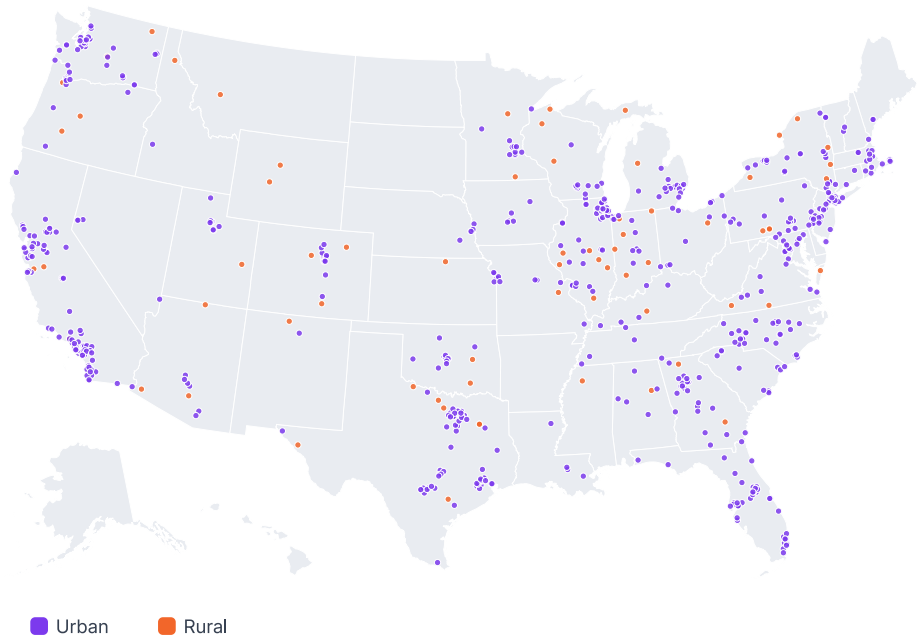
THE REST OF THE FIELD

Red E (202) and Electrify America (186) round out the top five, with ChargePoint (169) close behind. Networks outside the top 10 collectively added 1,034 ports, more than any single operator except Tesla.

Q3 2026's 664 New Stations Spread Nationwide, Led by California, Texas and Illinois

US EV Charging Stations Opened in 2026 Q3 — 664 new stations.
Urban vs Rural

Source: Paren



Key Insights

TEXAS CLOSES THE GAP WITH CALIFORNIA

California still led with 87 new stations, but that was down from 128 stations in Q2 as smaller networks slowed while Tesla held its pace. Texas moved the other way, rising to 66 stations from 54, with Walmart and Ionna opening 20 stations between them. North Carolina (26 stations, from 17) and Georgia (26 stations, from 18) were the next biggest gainers.

Q2'S ONE-OFF WAVES OF NEW STATION DEPLOYMENT DID NOT REPEAT

Outside California, the slowdown was concentrated in a handful of states. South Carolina fell to 10 new stations, Utah to 10 and Kentucky to 5, while Arkansas added none. Florida (40), Massachusetts (12) and Colorado (16) also eased from Q2.

METRO GROWTH SHIFTS TO THE SOUTH-CENTRAL US

Dallas–Fort Worth (23 stations, from 13) and Houston (17 stations, from 9) posted the largest metro gains, followed by Oklahoma City and Kansas City. Rural markets accounted for 68 new stations, about 10% of the quarter's total.

90% Urban — 596 of the 664 new stations opened in urban markets; deployment is still concentrating in dense, high-utilization corridors.

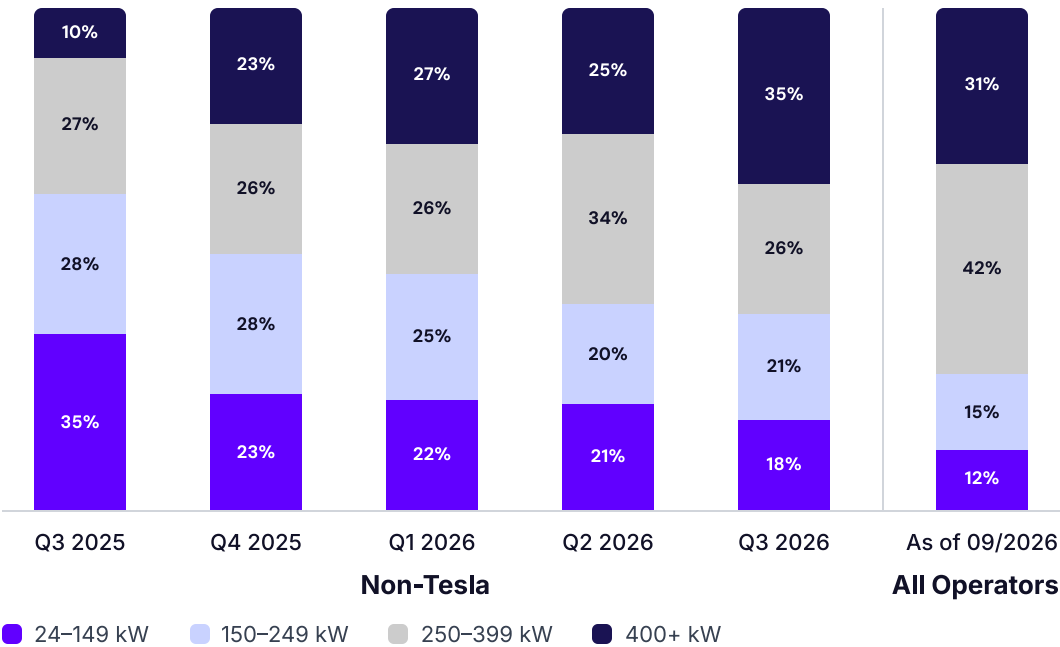
42% From 5 states — California, Texas, Illinois, Florida and New York drove roughly 42% of Q3 openings; California alone about 1 in 8 (87 stations).

High-Power Charging Just Hit A New High – Again

New DCFC Ports Opened by kW Power Level

Non-Tesla quarterly · All operators as of 09/2026

Source: Paren



35%

of new non-Tesla ports rated 400+ kW in Q3 2026, now the largest power tier outside Tesla

Key Insights

Including Tesla, 73% of new ports installed in Q3 have a rated nameplate of at least 250 kW, up from 69% in Q2 and 60% a year ago. Among non-Tesla networks, the 250+ kW share edged up to 61%, from 59% in Q2, after a year of sharp gains.

400 KW AND ABOVE IS NOW THE FASTEST-GROWING TIER

Among non-Tesla networks, 35% of new ports in Q3 were rated 400 kW or more, up from 10% a year ago, making it their largest power tier. Including Tesla, the share reached 31%, from 7%. Ionna (378 ports), Walmart (344) and Tesla (303) added the most, with Tesla's coming from 26 new sites equipped with its V4 cabinets rated at 500 kW. Tesla now has 42 sites with 487 ports rated at 500 kW.

LOWER-POWER CHARGING HOLDS ITS GROUND

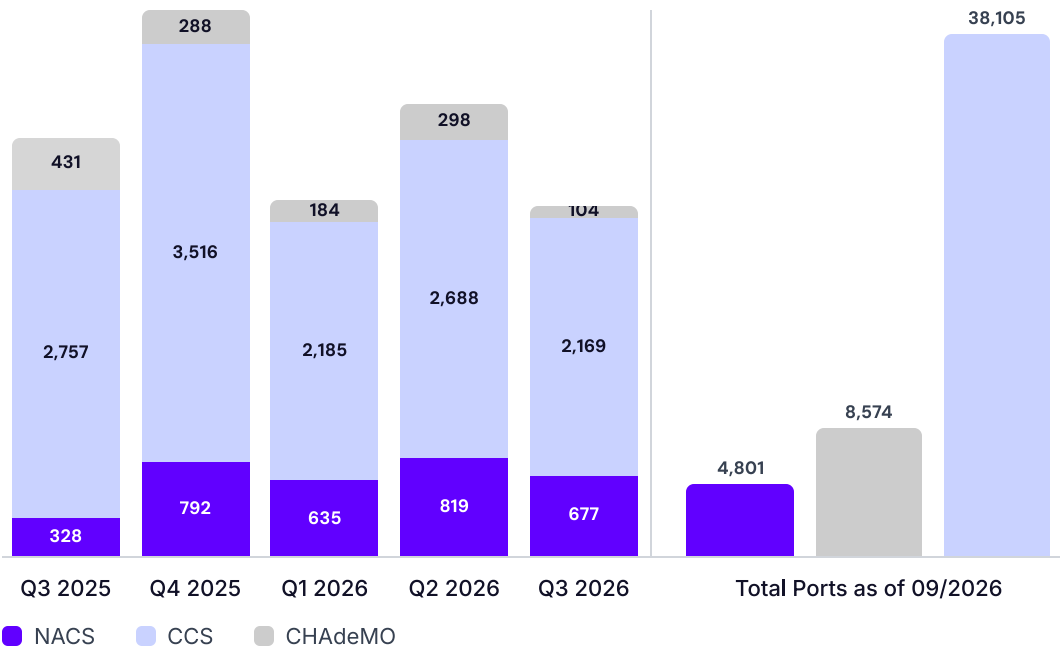
Sub-150 kW ports still made up about one in eight new installs. Some networks build specifically for longer-dwell locations rather than highway travel: Dirt Road Charging, for example, deploys 24 and 30 kW chargers, and 50 and 60 kW chargers are still being added across the country. ChargePoint (111 ports), In Charge (65) and Red E (62) added the most sub-150 kW ports this quarter.

NACS Adoption Has Basically Plateaued At Just Over A Fifth Of New Ports

Connectors Deployed at Non-Tesla Charging Networks

New ports by connector type · Total ports as of 09/2026

Source: Paren



Key Insights

Non-Tesla networks installed 677 NACS ports this quarter, 23% of new non-Tesla connectors. That is essentially flat against Q2 (22%) and Q1 (21%), after more than doubling from 9% in Q3 2025. CCS still dominates new builds at 74% of the quarter.

NACS-ONLY STATIONS BEGIN TO APPEAR

Ionna opened its first NACS-only stations this quarter, in Lancaster and Perris, California, with 4 ports each. Rivian is also building NACS-only: 3 of its new Q3 stations, in Tampa and West Melbourne, FL, and Englewood, CO, follow 7 in Q2. Red E and Flo each opened one NACS-only station in Q3.

THE INSTALLED BASE KEEPS SHIFTING

NACS now accounts for 9% of non-Tesla ports, up slightly from the Q2 close, while CHAdeMO's share continues to slip, to about 17%.

9% of connectors at non-Tesla charging stations are NACS (4,801 of 51,480), as of 09/2026

02

SECTION

SECTION 02

Utilization & Reliability

How utilization and reliability are trending across the U.S. as the fast-charging network scales through Q3 2026

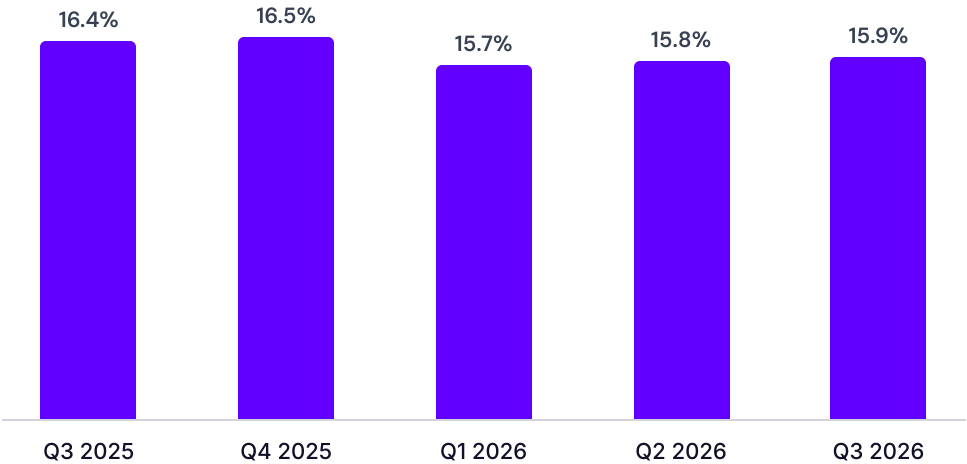
UTILIZATION

Utilization Holds Steady As The Network Passes 80,000 Ports

Avg Utilization Rate by Quarter

% of charging time in use · all public DCFC ports

Source: Paren



15.9%

national utilization, Q3 2026

+26%

growth in tracked ports since Q3 2025

Key Insights

National utilization, the share of time a port spends charging a vehicle, was 15.9% in Q3, virtually unchanged from 15.8% last quarter. It has stayed between 15.7% and 16.5% for five straight quarters, a close balance between supply and demand at the national level.

SAME RATE, DIFFERENT MARKET

Utilization is close to a year ago (16.4%), but the market underneath has changed. Infrastructure grew 26% and charging sessions grew 26%, to 50.4 million in the quarter.

WHAT MOVED DEMAND IN Q3

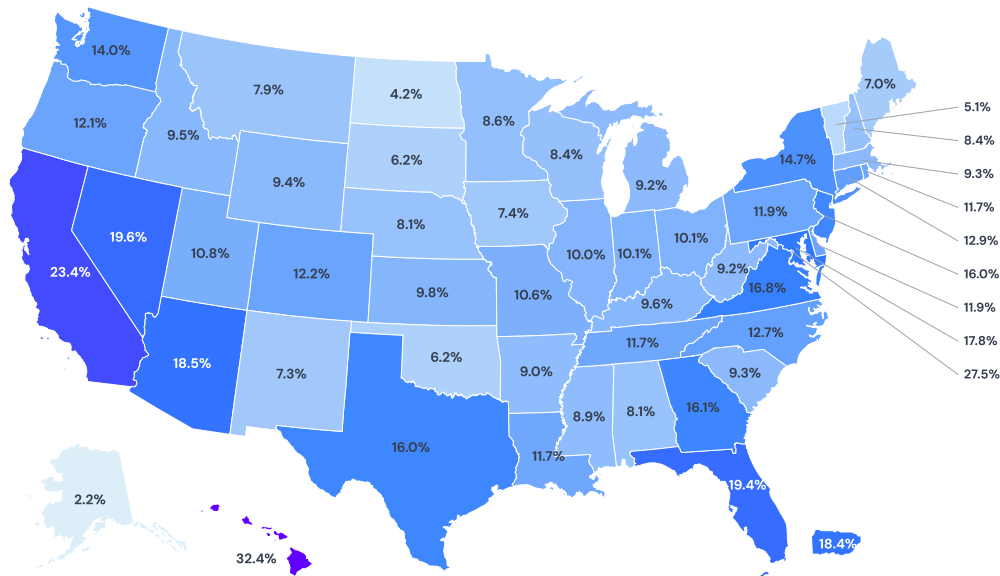
Sessions hit a record 17.6 million in July before easing in September. Ports in the top 30 metros ran at 21.1% utilization, about twice the 11.0% everywhere else. Over the quarter, metro utilization dipped 0.3 points while the rest of the country gained 0.3, in line with summer highway travel. Nevada (+1.1) and Texas (+0.9) gained despite new supply, while Illinois (–1.0), Washington (–0.9) and Florida (–0.8) fell as new ports outpaced demand.

UTILIZATION

Hawaii Just Took The #1 Utilization Spot Back From DC

Avg DCFC Utilization Rate by State
% of charging time ports are in active use

Source: Paren



Key Insights

Hawaii posted the country's highest utilization this quarter at 32.4%, overtaking Washington DC (27.5%), which led at 29.6% last quarter. California held its #3 spot at 23.4%, unchanged from Q2.

NEVADA'S ARRIVAL, AND THE BOTTOM OF THE LIST

Nevada moved up to fourth at 19.6%, from 18.5% last quarter. At the other end, Alaska posted the lowest utilization in the country at 2.2% — essentially unchanged from Q2's 2.0%, but still the clear floor — with North Dakota (4.2%) and Vermont (5.1%) also trailing well behind the national 15.9% average.

32.4% Hawaii — highest state utilization

2.2% Alaska — lowest state utilization

UTILIZATION

Los Angeles Leads The Top Metros At Twice The National Utilization Rate

Top 10 Metros by Utilization — Q3 vs. Q2 2026

Source: Paren

Q3 utilization, quarter-over-quarter change & net new ports · top 30 metros by port count

METRO AREA	Q3 UTIL.	Q2 UTIL.	NET NEW PORTS Q3
Los Angeles–Long Beach–Anaheim	31.8%	31.0%	+153
Miami–Fort Lauderdale–Pompano Beach	28.4%	30.5%	+102
San Diego–Chula Vista–Carlsbad	27.8%	27.8%	+86
San Francisco–Oakland–Berkeley	26.2%	26.4%	–14
Phoenix–Mesa–Chandler	24.3%	23.5%	+26
Las Vegas–Henderson–Paradise	23.8%	22.6%	+8
Austin–Round Rock–Georgetown	23.1%	20.3%	+17
Washington–Arlington–Alexandria	22.8%	23.7%	+46
Riverside–San Bernardino–Ontario	22.4%	22.7%	+114
Atlanta–Sandy Springs–Alpharetta	22.2%	21.9%	+79

Key Insights

CALIFORNIA AND THE SUN BELT HOLD THE TOP SPOTS

Los Angeles led all top-30 metros at 31.8% in Q3, twice the national rate of 15.9%. Miami (28.4%) and San Diego (27.8%) followed, and every metro in the top 10 sits above 22%. Four of the ten are in California.

AUSTIN POSTS THE BIGGEST GAIN

Austin rose 2.8 points quarter-over-quarter to 23.1%, the largest increase among the top 30 metros, while adding 17 ports. Las Vegas (+1.2 points) and Phoenix (+0.9 points) also climbed.

NEW SUPPLY IS LANDING IN THE BUSIEST METROS

The top 10 added a net 617 ports in Q3, led by Los Angeles (+153), Riverside (+114) and Miami (+102). Miami's utilization slipped 2.1 points to 28.4% as its port count grew 8%, a signal that increased supply in that area could be easing driver wait times.

31.8%

Los Angeles — highest metro utilization, 2.0x the 15.9% national rate

+2.8 pts

Austin — largest quarter-over-quarter gain among the top 30 metros

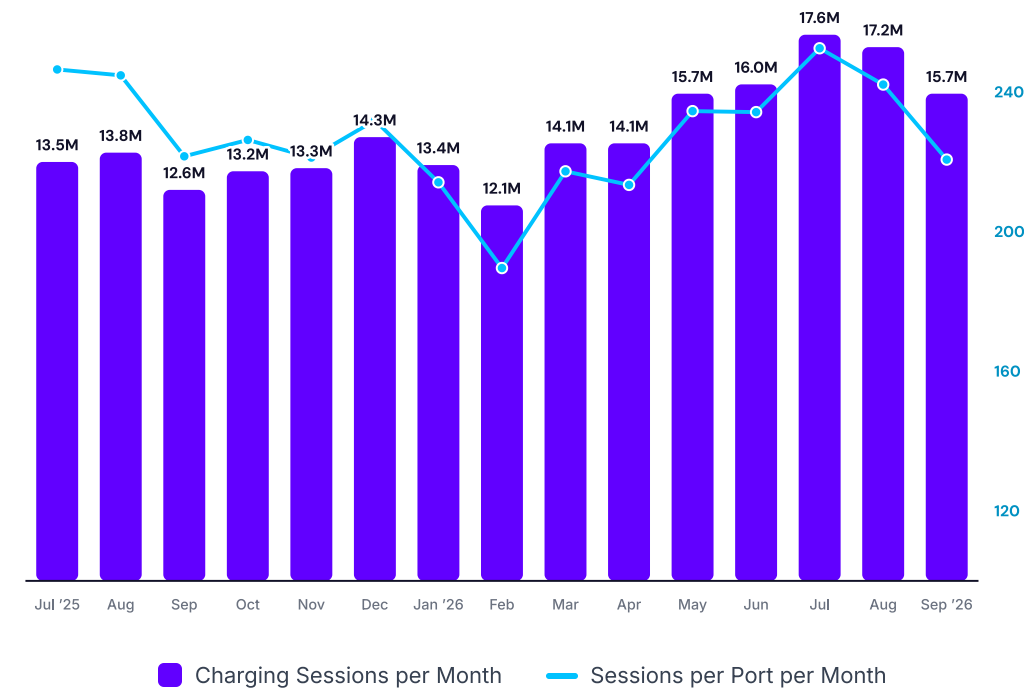
UTILIZATION

Charging Sessions Hit A New Peak Of 17.6 Million In July

Sessions per Port & Volume of Charging Sessions

Monthly charging sessions & sessions per port, stable trailing window

Source: Paren



Key Insights

Monthly charging sessions reached 17.6 million in July 2026, the highest month on record, before easing to 17.2 million in August and 15.7 million in September. Q3 sessions totaled 50.4 million, up 26% from 39.9 million in Q3 2025. Peak to peak, July sessions were up 30% from 13.5 million in July 2025, and August sessions were up 25% from 13.8 million.

SUPPLY CAUGHT UP WITH SUMMER DEMAND

July 2026 ran hotter than last year at 252.6 sessions per port, against 246.5 in July 2025. Supply caught up after the peak: August 2026 (242.2) came in close to August 2025 (244.8) despite far more sessions, and September (220.7) matched September 2025 (221.6). Total sessions kept rising from July to August in 2025 but eased over the same months in 2026.

17.6M charging sessions, July 2026 — the series high

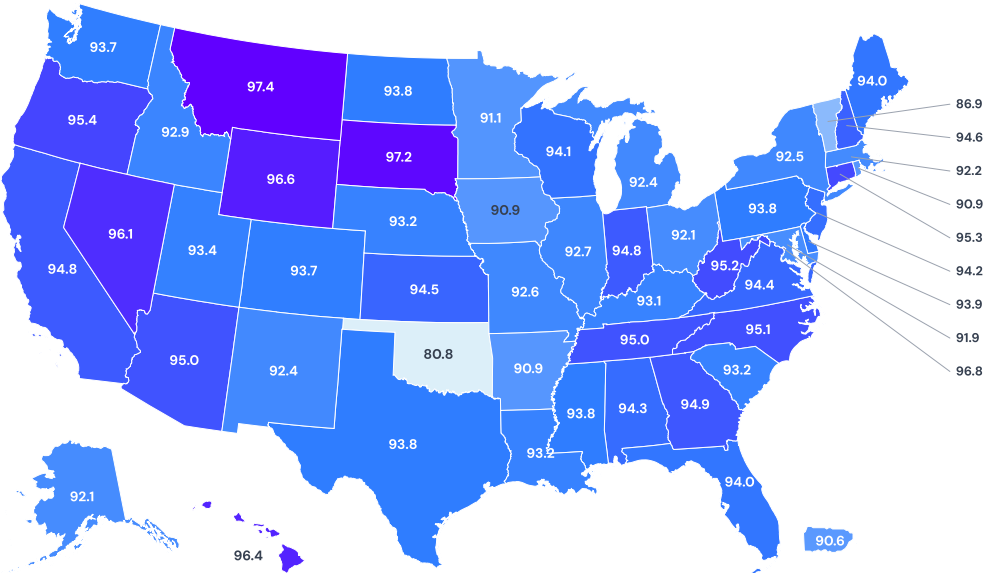
242.2 sessions per port, August 2026

RELIABILITY

Reliability Holds Nationally, But The Fastest-Building States Are Slipping

Avg DCFC Reliability Rate by State
Reliability score, Q3 2026

Source: Paren



Key Insights

The national reliability score was essentially unchanged at 93.9, against 93.7 a year ago, but 29 of 52 states and territories declined over the year.

MORE STATES ARE CLEARING 90

50 of 52 states and territories scored 90 or higher in Q3, up from 46 a year ago, and no state fell below 80 for the first time in five quarters. Only Oklahoma (80.8) and Vermont (86.9) remain under 90.

MOST IMPROVED

DC rose 6.9 points to 96.8, West Virginia 5.4 points to 95.2 and Delaware 3.3 points to 93.9. Oklahoma gained 2.5 points to 80.8, leaving the 70s, though it remains the lowest-scoring state. Montana (97.4) leads the country.

BUSIER STATES SCORE HIGHER

States above 15% utilization average 94.4 on reliability, against 91.7 for states below 8% (see next page).

-3.2 Minnesota — largest year-over-year decline among states with 500+ ports

+2.5 Oklahoma — up to 80.8 year over year, out of the 70s

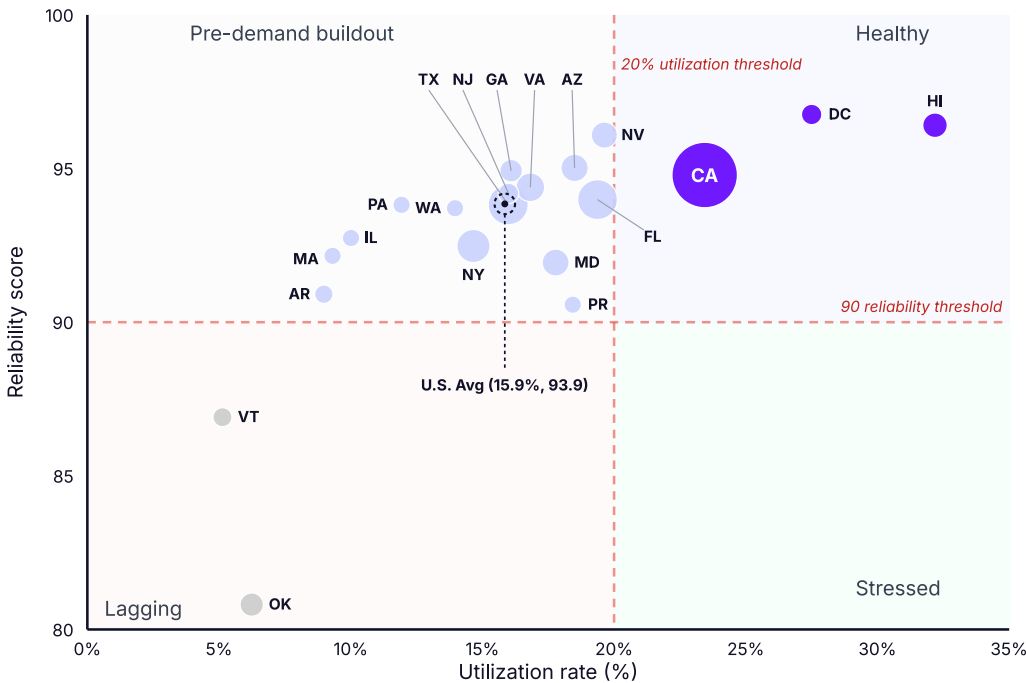
UTILIZATION

The Healthy Quadrant Narrows To Three As Nevada And Florida Sit Just Below The Line

Utilization vs. Reliability by State

bubble size = number of ports · 20 of 52 states shown

Source: Paren



Healthy Stressed Pre-Demand Buildup Lagging

Key Insights

Hawaii, DC and California are the only states in “Healthy” this quarter, the fewest in five quarters. Florida slipped just under the 20% line to 19.4%, and Nevada rose to 19.6% but stayed below the threshold to enter the best quadrant.

LAGGING IS DOWN TO TWO STATES

Only Oklahoma and Vermont remain in “Lagging,” down from five states a year ago, after Arkansas, Rhode Island and West Virginia moved above the 90 reliability threshold. Oklahoma’s improvement is accelerating: its score rose 2.2 points this quarter to 80.8, after gains of 1.4 and 1.1 points in the two prior quarters.

THE BUILDOUT MIDDLE IS RELIABLE AND NEARING HEALTHY

The 47 states in “Pre-demand Buildout” average 93.7 on reliability, and 41 of them score 92 or higher. Five sit within three points of the 20% utilization threshold, the most in five quarters: Nevada (19.6%), Florida (19.4%), Arizona (18.5%), Puerto Rico (18.4%) and Maryland (17.8%). Florida and Maryland have both been in “Healthy” within the past year.

3 states land in the Healthy quadrant — Hawaii, DC and California

90.4% of states sit in the dominant Pre-demand Buildout middle group

03

SECTION

SECTION 03

EV Charging Pricing

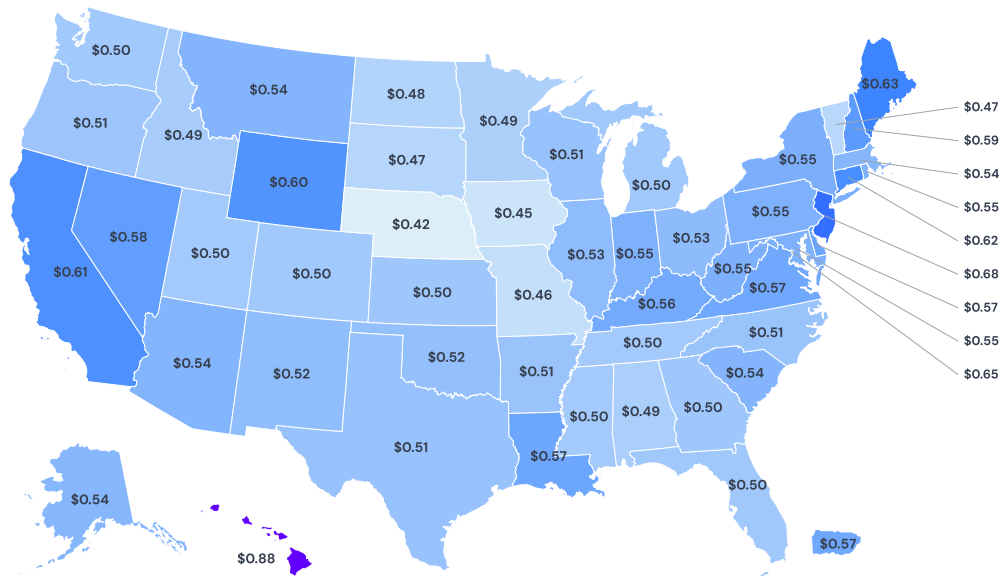
How fast-charging prices and pricing models vary across U.S. states, and why the market remains structurally fragmented.

PRICING

Tesla Drives The National Price Increase While Other Networks Hold Flat

Avg Pricing at All Stations by State
Average pricing across all charge point operators

Source: Paren



Key Insights

The national average reached \$0.540/kWh in Q3, up 0.4% from Q2 and 2.7% from a year ago. Tesla accounts for the increase: its non-member price rose 15% over the year to \$0.569 and its member price 9% to \$0.396, while the non-Tesla average has held near \$0.533 for five quarters.

WHERE PRICES ROSE MOST

34 states got more expensive this quarter, led by Delaware (+6.9%, to \$0.574), Montana (+5.9%) and New Jersey (+3.7%, to \$0.675). Hawaii rose 3.5% to \$0.877, still more than \$0.20 above any other state.

CHEAPER IN TEXAS

Eleven states got cheaper, led by Texas (−2.7%, to \$0.513) and Michigan (−2.5%). Texas utilization rose from 15.1% to 16.0% over the same period. Nebraska remains the least expensive state at \$0.424.

SAME PRICE, MORE USE

Prices held steady in Maine and Puerto Rico while utilization climbed about 2 points, to 7.0% and 18.4%.

+15% Tesla non-member price, year over year (\$0.495 → \$0.569/kWh)

\$0.533 Non-Tesla average price per kWh, unchanged for five quarters

PRICING

Fixed Pricing Held Essentially Flat At 73% This Quarter

Pricing Models Used — Q3 2026

Source: Paren

Top & Bottom Five States with 25+ Stations—Sorted By Fixed Pricing

STATE	FIXED (KWH)	TOU (KWH)	TIME (MINUTES)
Vermont	97.9%	2.1%	1.1%
Mississippi	94.9%	7.7%	1.3%
Alabama	93.1%	9.2%	1.7%
North Dakota	92.7%	7.3%	4.9%
New Hampshire	92.6%	22.1%	1.5%
Texas	66.7%	35.4%	4.4%
Maryland	65.8%	46.1%	0.5%
Virginia	65.0%	44.1%	0.9%
Nevada	64.6%	46.9%	1.8%
Nebraska	58.8%	11.8%	29.4%
US Average*	72.9%	27.1%	—

Stations offering more than one pricing model are counted under each, so rows can exceed 100%. *US Average is calculated among stations with per-kWh pricing (fixed or time-of-use) and excludes per-minute pricing (2.3% of stations); across all stations the split is 71.2% fixed, 26.5% time-of-use and 2.3% per-minute.

Key Insights

Among stations that price per kWh, 72.9% use a fixed rate and 27.1% use time-of-use, essentially unchanged from 73.3% and 26.7% last quarter. Vermont remains the most fixed-rate state at 97.9%.

DIFFERENT ALTERNATIVES TO FIXED PRICING

Among the states shown, Nevada (46.9%), Maryland (46.1%) and Virginia (44.1%) have the highest time-of-use shares. Nebraska also has a low fixed share (58.8%), but mostly because of per-minute billing (29.4%) rather than time-of-use (11.8%).

PEAK AND OFF-PEAK ARE DRIFTING APART

Over the past year, peak time-of-use prices rose 4.3% to \$0.637/kWh while off-peak prices held at \$0.438, widening the spread to nearly 20 cents. Fixed rates rose 3.3% to \$0.538, so drivers who can charge off-peak now save about 10 cents per kWh against a fixed-rate station, up from 8 cents a year ago.

46.9% Nevada — highest time-of-use share among states shown

97.9% Vermont — highest state fixed-pricing share

04

SECTION

SECTION 04

Appendices

Supporting data, definitions, and reference materials.

Appendix A: Terminology

Charging Infrastructure

CPO

Charge Point Operator

Fast Charging

Charging port of a minimum of 24 kW

NACS

North American Charging Standard; Tesla's charging connector now adopted by many networks.

NEVI

National Electric Vehicle Infrastructure program under the Bipartisan Infrastructure Law.

Connector

A charging plug conforming to CCS, CHAdeMO, or NACS (J3400) standard

Port

A charging unit with one or more connectors capable of charging one EV.

Station

A physical location with one or more EVSEs (charging ports) also referred to as a charging **site**.

Utilization & Reliability

Reliability Index

The Paren-specific calculation that measures charger reliability taking into account recent successful charge sessions with and without retries, failed charge attempts, and station downtime over a specific time period.

Tesla

Tesla is a reference to the Tesla Superchargers

Utilization

The percentage of tracked time spent on both successful and unsuccessful charging activity at a charger over the time period open per day.

EV Charging Pricing

Fixed Price

Refers to a consistent rate per kWh for the entire charging day.

Time-of-Use (TOU)

Pricing changes based on the time of day with higher prices during expected peak demand time. It encourages off-peak charging and can help balance grid demand.

Dynamic Pricing

Pricing changes based on an ad-hoc changes not tied to a specific time. Typically, dynamic pricing daily spreads are within the same minimum and maximum of the TOU model.

Time

Charges by the minute or hour. Often used where energy-based pricing is restricted.

Power

Pricing based on the amount of kW being pulled by the vehicle. Currently only used in Canada.

Flat

Fixed fee for a session, regardless of kWh pulled. Note: this can sometimes be a bargain or a ripoff. Driver beware!

Appendix B: Methodology

Changes in 2026

Continuous Refinement:

We introduced targeted refinements to improve accuracy and better reflect real-world market conditions. Some figures may differ slightly from earlier editions. Most notably, in Q2 2026, our session counting methodology improved across busy charging stations, resulting in more tracked, successful charging sessions.

Infrastructure Methodology:

We enhanced how we measure station growth and identify new stations, reducing reliance on AFDC open-date fields and incorporating additional signals for more accurate activation timing.

Pricing Methodology:

We updated our average pricing model to exclude free chargers from calculations to reduce distortion. Prior-quarter figures were recalculated using this updated methodology for comparability.

Port-Count Universes:

Port counts vary by analysis because the report uses different validated data universes. Network-size figures use Paren's reconciled installed DCFC port base. CPO market-share tables use the subset of installed ports that can be attributed to a charging network/operator. Sessions, utilization and reliability use ports within Paren's real-time observed coverage for the reporting period.

These totals answer different questions and should not be read as competing counts. Installed-base figures describe network scale; operator-attributed figures support leaderboard and market-share analysis; observed-coverage figures support performance metrics such as sessions per port, utilization and reliability.

Total Port Counts

Starting with the Q3 2026 report, the total fast charging station and port counts are better adjusted to exclude chargers and sites that have been retired. Comparing previous report total port numbers with the new ports added will show a discrepancy due to these removed ports.

Counting New Infrastructure

We apply the following rules when calculating new infrastructure:

1. **Simple:** Introduction of new equipment where nothing was in place previously counts as new infrastructure.
2. **Expansion:** Adding new chargers to an existing site increases the port count but not the station count.
3. **New Owner Replace:** In an existing site, if a new CPO takes over and replaces the hardware, the station and ports are counted as new.
4. **Same Owner Replace:** In an existing site, if the existing CPO replaces hardware with the same port count, it does not count towards new infrastructure for that period.

Data Sources

- Paren Public Charging Infrastructure Dataset
- AFDC
- Select NEVI RFP documents and award data
- Proprietary charging session / utilization models

About Paren

Paren is the intelligence layer of EV charging infrastructure.

Paren operates the most complete, real-time view of fast charging in North America — aggregating, enriching and standardizing data across networks into a single source of truth. Automakers, charge point operators, map makers, ride share platforms and government agencies rely on Paren to turn fragmented signals into decisions they can trust. With historical depth back to January 2024 and live data today, we give the industry a consistent standard for how performance is measured.

80,964

Total DCFC ports in the US

100M+

Real-time events processed per day

98%

Real-time coverage of the US's DCFC ports

100%

DCFC port coverage in the US

We value your feedback — hello@paren.app ↗

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Former head of JOET, Chicago/D.C. DOTs, Entrepreneur

Garth Saloner
Former Dean of Stanford GSB

Luc Vincent
Founder Google Street View, Lyft Level 5

♦ **Accreditation**

Certified B Corporation.
SOC 2 Type II certified.



♦ **Investors**

Paren is backed by leading venture capital funds, including Base10.

■ **Offices**

Paren HQ is in San Francisco and Québec.

In the News

Paren is regularly featured in leading news outlets such as The Wall Street Journal, The Washington Post and The New York Times, as well as industry-specialized outlets such as Electrek and InsideEVs.

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Access Paren's full dataset at paren.app

DCFC coverage, reliability scores, pricing data, operator rankings and custom reporting — all in one platform.

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