

TRANSPORTATION ELECTRIFICATION IN THE SOUTHEAST

Seventh Annual Report — September 2026

By Matthew Vining and Kelley Flanagan



Southern Alliance for
Clean Energy

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Since September 2020, Atlas Public Policy (Atlas) has partnered with the Southern Alliance for Clean Energy (SACE) to publish a report on Transportation Electrification in the Southeast. This report benchmarks progress on transportation electrification in six states in the Southeast: Alabama, Florida, Georgia, North Carolina, South Carolina, and Tennessee. This is the seventh report and provides an update on progress from July 2025 through June 2026.

About Atlas Public Policy

For over a decade, Atlas Public Policy has equipped businesses and policymakers with the tools and insights they need to make strategic, impactful decisions that are pragmatic and serve the public interest. We build analytical tools and dashboards using powerful, accessible technology, and offer expert advisory services to tackle a wide range of pressing and emerging issues. Atlas staff are nationally known experts in vehicle electrification, sustainable transportation policy analysis, and clean energy planning.

About the Southern Alliance for Clean Energy

The Southern Alliance for Clean Energy (SACE) is a nonprofit organization that promotes responsible and equitable energy choices to ensure clean, safe, and healthy communities throughout the Southeast. As a leading voice for energy policy in our region, SACE is focused on transforming the way we produce and consume energy in the Southeast.

Executive Summary

Despite a year marked by slower-than-expected electric vehicle (EV) demand, policy uncertainty, and manufacturing delays and cancellations, the Southeast remains the nation's leader in EV manufacturing investment and employment. Through June 30, 2026, the region accounted for 40 percent of announced U.S. EV manufacturing investment and 32 percent of announced EV manufacturing jobs, totaling nearly \$74 billion and more than 61,300 jobs. New investment announcements totaling \$3.9 billion and 1,340 new jobs did not offset the cancellation of \$4.5 billion in investment and 9,700 anticipated manufacturing jobs. Amid these headwinds, many major facilities continued progressing toward production.

EV adoption continued to advance across the Southeast, though growth was uneven. Florida saw higher EV sales shares than the national average, while other states saw lower EV sales shares. The region surpassed 1,137,000 cumulative new passenger EV sales and recorded nearly 225,000 sales in the past 12 months, registering 25 percent year-over-year growth and reaching 7.4 percent EV market share of new passenger vehicle sales in Q2 2026. Despite volatility in 2025, new passenger EV market sales share started to rebound in 2026 and the gap with national adoption rates narrowed. Additionally, the used EV market grew 34 percent, opening EV ownership to a wider consumer demographic.

As for charging deployment, while Level 2 public charging remains critical, investment has continued to shift toward direct current fast charging (DCFC), with DCFC ports making up more than half of all new ports added in the last 12 months and growing more than twice as fast as Level 2. Approved transportation electrification investments by investor-owned utilities rose to approximately \$497 million, led by new and expanded charging programs in Georgia, representing nearly \$58 million in new investment. Still, utility investment in the Southeast remains below the national average on a per-customer basis.

Public funding for transportation electrification remains in a period of adjustment since the start of the new administration in January 2025. Although cumulative federal and state funding in the Southeast reached \$2.5 billion, federal agencies awarded no new funding and froze, delayed, or rescinded several programs. Most notably, Congress rescinded more than \$135 million of the Southeast's previously awarded \$719 million in National Electric Vehicle Infrastructure (NEVI) funding. Despite this uncertainty, states continued deploying previously awarded funds for charging and fleet electrification.

State policy developments produced a mix of progress and setbacks, with Georgia delaying its new sales tax at public charging stations until 2028 and Tennessee strengthening EV

charger installation rights in Homeowners Association (HOA) communities, while Florida restricted future direct-to-consumer vehicle sales. As the Southeast continues to experience passenger EV sales and charging station deployment growth, and as medium- and heavy-duty fleets begin to electrify at scale, supportive state policy and coordinated utility planning will become increasingly critical to maintain healthy market conditions.

About the Data

Data for this report are described below. Data are through June 30, 2026, unless otherwise noted. Policy developments may be included through the report's September 2026 publication date when they are relevant to interpreting the data or near-term outlook. Where not derived from these sources, the source is noted.

Electric Vehicle (EV) Manufacturing Employment and Investment measures private-led, direct manufacturing jobs and investment for light-, medium-, and heavy-duty EV assembly; critical minerals processing and separation; EV batteries and recycling; EV parts; and EV chargers. Figures are facility-specific and rely on publicly reported data. Data are updated regularly using press releases or direct company communications, including removals if prior announcements are no longer in scope. Data should be read as indicators of expected investment and employment rather than confirmed outcomes. Data are sourced from the Clean Economy Tracker (CET) [1].

EV Sales are sourced from Experian (2019-present) via the Atlas EV Hub [2], and the former Alliance for Automobile Manufacturers (2011-2018). The report uses vehicle registrations from both data sources as a proxy for EV sales. Used vehicle registrations are from Experian data only. Atlas EV Hub provides aggregated EV sales data for all states by make and model since 2019 and includes battery EVs (BEVs) and plug-in hybrid EVs (PHEVs). Passenger vehicles account for light-duty classes 1-2A and other passenger vehicles under classes 2B and 3 (e.g., Tesla Cybertruck), using gross vehicle weight rating (GVWR) as the indicator. Commercial vehicles include non-passenger medium-duty vehicle classes 2B-6, and heavy-duty 7-8.

EV Charging Deployment tracks publicly accessible EV charging infrastructure, sourced from the Department of Energy's Alternative Fueling Station Locator, via the Atlas EV Hub [2]. In addition to this tool, Atlas's Electric Freight Dashboard tracks charging sites and ports specifically dedicated to medium and heavy-duty EVs, collected from press releases and company announcements. Charging equipment may have multiple connectors (plugs);

however, connectors are not counted as separate ports unless both are able to supply power to a vehicle simultaneously.

Electric Utility Investment tracks EV-related investments sourced from investor-owned electric utility (IOU) dockets filed with state utility regulatory commissions, via the Atlas EV Hub [2]. Investment refers to funding in transportation electrification from IOUs approved by state commissions. Investment figures do not include utilities where no investments were approved. Data does not include investment from electric cooperatives or municipally owned utilities.

Public Funding for EVs tracks federal and state government funding programs dedicated to transportation electrification, including funds allocated through the Volkswagen Settlement via the Climate Program Portal (CPP) [3] and the Atlas EV Hub [2]. For the purposes of this report, grant funds that have been allocated, awarded, or made available are collectively referred to as "awarded" but do not include rescissions. Where available, funding data are also classified as obligated and outlaid. The data excludes loans and tax credits.

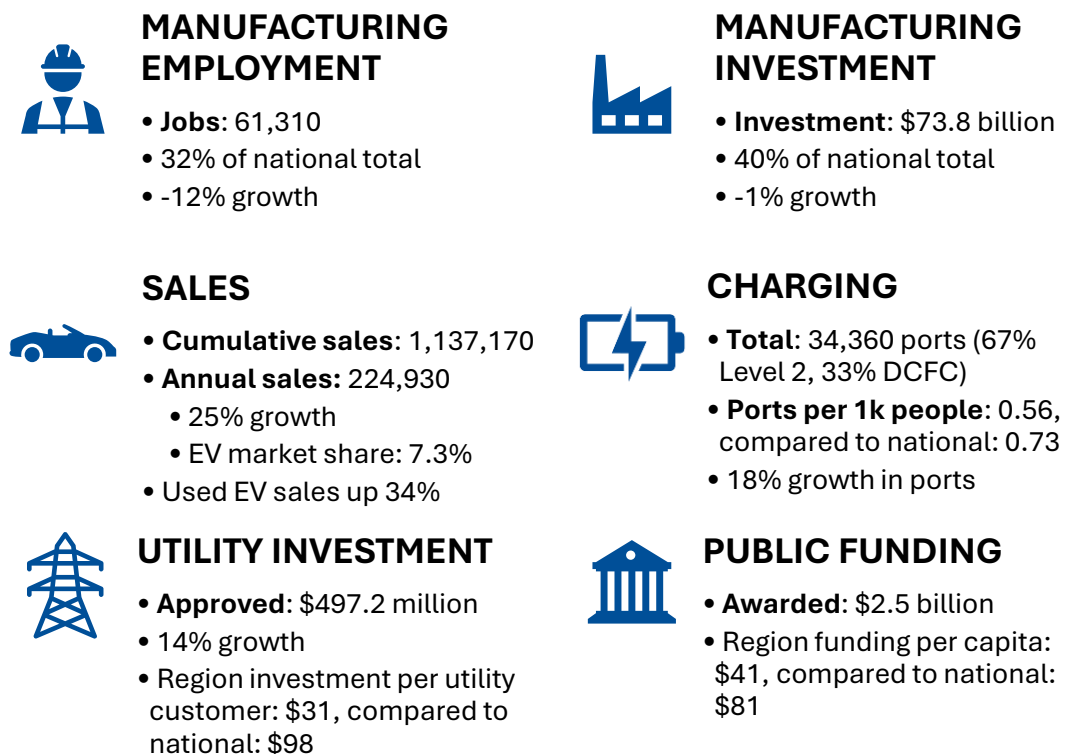
Population Data are sourced from the U.S. Census Bureau's American Community Survey (ACS). Current data are from the 5-year ACS 2023 data file, so current population numbers reflect that year. These data are used to calculate per capita metrics. Current estimates for state populations may differ from what is used in this report.

Introduction

This report provides a state of play for transportation electrification in the Southeast, focused on changes from July 2025 through June 2026. The report first examines manufacturing investment and employment, where the region remains a national leader despite cancellations and delays. The report then reviews electric vehicle (EV) sales, charging deployment, utility investment, public funding, and state policy to show where progress is continuing, where momentum has slowed, and where decision-makers face the greatest uncertainty.

Between July 2025 and June 2026, transportation electrification faced challenges, but despite these challenges, the Southeast continued to advance EV sales, charging deployment, and EV manufacturing, though progress varied across states and sectors (Figure 1). This report includes policy developments in Alabama, Florida, Georgia, North Carolina, South Carolina, and Tennessee through its September 2026 publication date; however, the underlying data reflect activity through June 30, 2026.

Figure 1. Electric Transportation Indicators in the Southeast Through June 2026



Sales measures include passenger EVs. Manufacturing Employment and Manufacturing Investment refer to announced jobs and investments in EV assembly, EV parts, EV charging infrastructure, batteries, critical minerals processing, and battery recycling facilities. Charging refers to publicly accessible chargers, and rankings and growth include Level 2 and DCFC. Utility Investment refers to investor-owned utilities only. For the purposes of this report, grant funds that have been allocated, awarded, or made available are collectively referred to as "awarded" but do not include rescissions. Totals are cumulative unless stated. EV market share is averaged between July 1, 2025 and June 30, 2026.

Source: Atlas EV Hub [2] and Clean Economy Tracker [1] for the Southern Alliance for Clean Energy

Three notable forces helped shape the EV market over the past 12 months. First, although new EV sales stagnated at the end of 2025, the impending expiration of federal tax credits for new and used EVs in September 2025 prompted consumers to accelerate purchases, boosting EV sales in Q3 2025 [4]. Second, Iran's closure of the Strait of Hormuz in response to U.S. and Israeli attacks in February 2026 contributed to a sharp increase in oil prices [5] [6]. As gasoline prices have risen, EVs have become more attractive to consumers, particularly as average EV prices continue to decline [7]. Finally, growth in EV leasing several years ago began to expand the used EV market as leased vehicles return to dealerships.

After a period of lower new EV sales, data from Atlas find that used EV sales in the Southeast totaled over 140,800 in the last 12 months, 34 percent more than the year prior. This growth underscores the expansion of used EV sales as off lease returns and vehicle resales build the available inventory of more affordable EV options.

As the federal policy landscape and the EV market have shifted, manufacturers have had to navigate uncertainty, resulting in production delays and the cancellation of \$4.5 billion in projects in the EV and battery manufacturing supply chain in the Southeast in the last 12 months. Some automakers have pivoted away from EV assembly and EV battery production in favor of gasoline and hybrid vehicles or batteries for grid storage [8] [9]. Despite setbacks, the Southeast remains a major EV and battery manufacturing hub, with many large facilities advancing construction or beginning production. Companies also continued to announce new projects for upstream battery precursor materials, such as cathode and anode materials and the processing of critical minerals such as lithium, cobalt, graphite, manganese, and nickel.

Federal policymakers continue to revise policies and regulations that have defined the industry in the last few years, including by freezing or cutting public funding, updating requirements for recipients to access funding, and revoking several key incentive policies. Federal agencies, for instance, continue to restrict funding for transportation electrification specifically, creating gaps in anticipated public funding for states [10] [11]. In February 2026, the U.S. Environmental Protection Agency (EPA) finalized a rule rescinding the 2009 Endangerment Finding and repealing greenhouse gas emission standards for light-, medium-, and heavy-duty highway vehicles and engines [12]. In May 2026, the EPA proposed to delay the implementation of Biden-era vehicle emission standards [13]. These changes reduce regulatory and funding support for transportation electrification and create uncertainty for automakers, fleet operators, and other stakeholders making long-term planning and investment decisions.

Manufacturing Employment and Investment

Over the past seven years, the Southeast's manufacturing story has been one of skyrocketing growth and opportunity, but between July 2025 and June 2026, the story became more mixed. The region continued to play a key role in the national electric vehicle (EV) and battery supply chain but fluctuating EV demand and the surging electricity needs

of data centers led some automakers to redirect underused battery capacity toward energy storage systems [14] [15] [16]. Meanwhile, manufacturers moved several supply chain projects into construction and production but canceled or downsized others, reducing net announced EV manufacturing investments and expected jobs.

The Southeast Records Both Wins and Losses

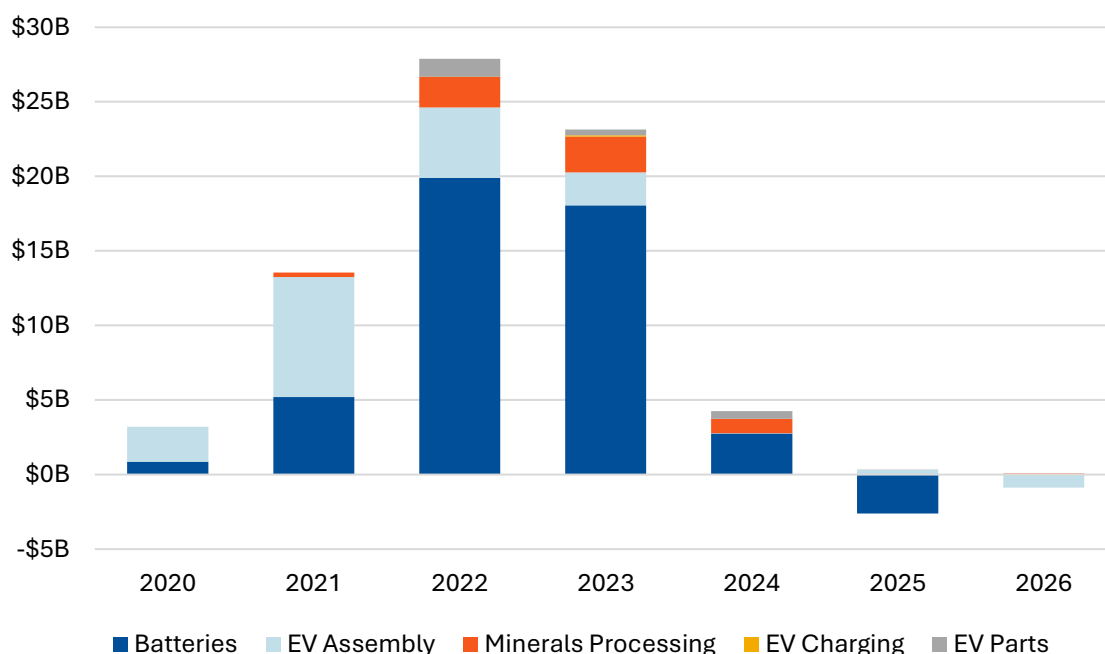
Companies have announced a net \$73.8 billion in EV manufacturing investments and committed to a net 61,310 EV manufacturing jobs across the Southeast through June 30, 2026.¹ These investments span more than 120 facilities throughout the region, including the processing of critical minerals (e.g., lithium carbonate production), battery materials processing (e.g., anodes), EV battery production and recycling, EV charging, EV assembly, and other EV component manufacturing operations.² New, positive EV manufacturing investment announcements totaled \$3.9 billion and 1,340 jobs over the past 12 months, down from \$4.8 billion and 2,280 jobs in the prior 12-month period. Over the past 12 months, companies in the Southeast also canceled or scaled back plans for five major facilities: Ford's BlueOval assembly plant in Tennessee, Enchem's electrolyte manufacturing facility in Tennessee, SK On's battery plant in Georgia, Rivian's EV manufacturing plant in Georgia, and VinFast's battery facility in North Carolina [17] [18] [19] [20] [21]. Together, these changes represented nearly \$4.5 billion in canceled or reduced investment and approximately 9,670 fewer anticipated manufacturing jobs.

Between July 2025 and June 2026, the region recorded a net investment decline of \$570 million and a net loss of 8,330 jobs. Cancellations and reduced investments pushed net announced EV manufacturing investment in the Southeast down by less than one percent over the past year, while announced jobs fell by nearly 12 percent. Through June 2026, EV battery manufacturing and recycling facilities made up the largest share of the region's announced net investment at \$45.2 billion (61 percent of all investment). The second largest share was \$20.3 billion (28 percent) for EV assembly (see Figure 2).

¹ These figures reflect publicly announced and tracked commitments, not confirmed completed spending or current employment.

² Rare earth elements, magnet production, and critical minerals extraction, are excluded from this report's data. For more information on report scope, please refer to the About the Data section. For more information about minerals captured in the scope of the report, please visit the Clean Economy Tracker's Methodology [123].

Figure 2. Announced Manufacturing Investment by Sector in the Southeast



This chart shows the sum of announced EV investment by manufacturing sector per year. Negative values indicate years when cancellations and retractions outweighed the value of new investments. ‘Batteries’ refer to EV batteries solely. The ‘Minerals Processing’ category includes the processing of critical minerals in the EV supply chain, including anode and cathode materials, cobalt, graphite, lithium, manganese, and nickel. The ‘EV Assembly’ category includes the production of light-, medium-, and heavy-duty vehicles. Data are through June 30, 2026.

Source: Clean Economy Tracker for the Southern Alliance for Clean Energy [1]

The Southeast has experienced both significant growth and notable manufacturing setbacks, particularly in the light-duty vehicle and battery sector. Signs of slower-than-expected EV demand began emerging in late 2023, but the trend became more apparent by late 2024, prompting some automakers and battery manufacturers to postpone or reduce planned production expansions [22] [23]. Subsequent policy changes in 2025 further weakened the outlook for EV adoption and manufacturing investment. Notably, the expiration of the consumer-facing New Clean Vehicle Tax Credit (30D) after September 2025 reduced a key incentive for EV purchases and eliminated a key driver of domestic EV manufacturing demand [24]. At the same time, tighter restrictions on the Advanced Manufacturing Production Tax Credit (45X), regulatory policy changes like revisions to the corporate average fuel economy (CAFE) standards, and the cancellation of clean energy

manufacturing grants have raised costs for domestic manufacturers and investors and introduced uncertainties for future plans [25] [26] [27].

Several companies have shifted their manufacturing priorities, either by abandoning EV production plans altogether, shifting EV production to facilities in other countries, delaying production timelines, or downsizing and consolidating operations. Alternatively, some automakers and battery manufacturers are adjusting operations to include energy storage battery production lines (Box 1).

Box 1. Shifting Battery and Automaker Investments in the Southeast

As electrification, domestic manufacturing, and rapid data center growth place increasing pressure on the grid, and the EV market adjusts to the post-incentive landscape, manufacturers are investing in stationary energy storage production [124].

Ultium Cells, the joint venture between General Motors and LG Energy Solution, halted EV battery production at its \$2.6 billion Spring Hill, Tennessee, plant in October of 2025 [125]. In March 2026, the company announced it would resume operations in the following quarter and recall 700 laid-off workers, as it shifts part of the facility's production from EV batteries to stationary energy storage systems. The joint venture is investing \$70 million to retrofit the plant for LFP battery cell production.

On December 15, Ford announced that its \$2.8 billion BlueOval City investment in Stanton, Tennessee—originally expected to create 2,900 jobs producing next-generation electric pickup trucks—will instead manufacture gasoline trucks [126]. In May 2026, SK On took full ownership of the BlueOval City battery plant portion of the campus, ending the battery joint venture with Ford, while continuing as a battery supplier for future Ford EVs [127]. SK On plans to begin producing both EV batteries and energy storage systems at the Tennessee facility in 2028.

Following Ford's cancellation of the all-electric F-150 in December 2025, SK On announced plans to lay off 958 workers, or about 37 percent of the workforce, at its Commerce, Georgia, battery plant. The company said it was expanding its presence in the energy storage systems market [19].

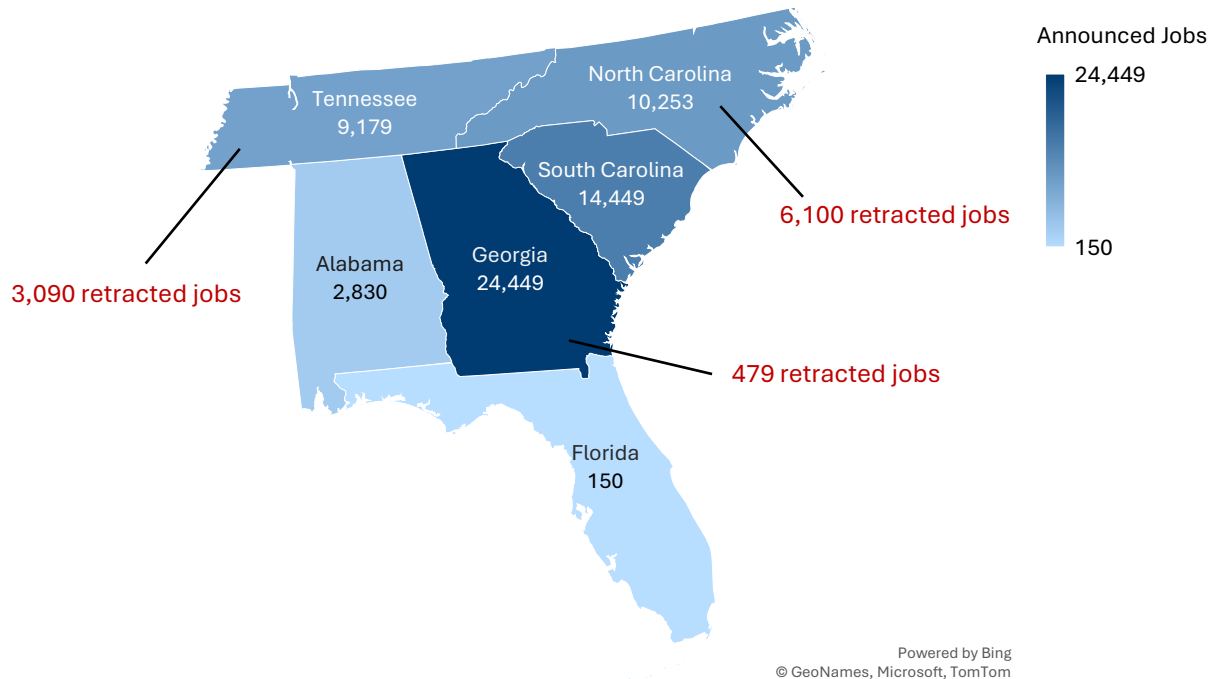
At least 11 Southeast facilities originally planned for EV battery or battery materials production have announced plans to shift to or add battery production for energy storage applications.

As new EV manufacturing investment announcements have slowed, upstream manufacturers have seen increased federal support for critical minerals production and processing, battery materials manufacturing, energy storage systems manufacturing, and battery recycling. In August 2025, the Department of Energy announced nearly \$1 billion in funding opportunities for critical minerals and battery materials supply chains, followed by an additional funding opportunity of up to \$500 million in March 2026 [28] [29]. While these investments primarily aim to strengthen domestic critical minerals and battery supply chains for national security purposes, they will also expand domestic battery expertise and capacity, helping lower EV costs over time. As batteries represent the largest cost component of an EV, expanding domestic production of battery materials can help reduce EV battery and other component costs, ultimately making EVs more affordable for consumers [30] [31].

The Southeast is still home to 40 percent of all EV manufacturing investments and 32 percent of anticipated EV manufacturing jobs announced in the United States. The region is home to three of the nation's top five states for EV manufacturing investment: Georgia, North Carolina, and South Carolina, with Georgia leading all states. However, Georgia, North Carolina, and Tennessee all saw job retractions from EV and battery manufacturers in the last 12 months because of cancellations or downscaled investments (Figure 3). One of the largest job reductions occurred in Chatham County, North Carolina, where VinFast cut projected employment at its planned manufacturing facility by approximately 6,100 jobs, lowering its workforce target from 7,500 to 1,400 positions. Despite the scale back, the company plans to restart factory construction later in 2028 [32] [33].

A handful of companies make up the largest share of announced investment and anticipated manufacturing jobs in the Southeast. Hyundai, Rivian, Volkswagen, and Toyota lead the region in projected EV manufacturing employment, while Toyota, Hyundai, LG Corporation, and SK On lead in EV manufacturing investments.

Figure 3. Total Announced EV Manufacturing Jobs in the Southeast and Call Outs for Cancellations in the Past 12 Months



This map shows the sum of announced EV manufacturing jobs (including critical minerals processing, EV assembly, battery and battery materials manufacturing, battery recycling, EV charging manufacturing, and other EV component manufacturing) by state. States that experienced a reduction in announced manufacturing jobs from July 1, 2025 through June 30, 2026 because of cancellations or downscaling of facilities are noted in red and included in the total job count per state. Data are through June 30, 2026.

Source: Clean Economy Tracker for Southern Alliance for Clean Energy [1]

The Southeast Anchors the United States' Role in a Global Supply Chain

The buildout of the Southeast's EV manufacturing ecosystem is well underway, with at least 56 facilities having started operations, representing about 60 percent of announced regional investments. Another 16 facilities are under construction and retooling, representing an additional 27 percent of announced regional investments. Table 1 summarizes the state of EV investments, including the sum of new investments and cancellations, through June 2026.

Table 1. New Investments and Investment Cancellations through June 2026

State	New Investments (\$ billions)	Cancellations since January 2025 (\$ billions)	Percent of Positive Investment Canceled
Alabama	\$3.1	\$0	0%
Florida	\$0.23	\$0	0%
Georgia	\$27.0	-\$2.6	10%
North Carolina	\$20.4	\$0	0%
South Carolina	\$16.1	-\$1.5	9%
Tennessee	\$18.5	-\$3.0	16%

Data are through June 30, 2026, and cancellations are from January 2025. “New Investments” represent all new, positive investments announced from 2000 through June 2026. Cancellations are shown beginning in January 2025 to coincide with the change in federal administration, reflecting any policy changes stemming from the new administration, including revisions and cuts to several clean energy manufacturing tax credits and incentives.

Source: Clean Economy Tracker [1] for Southern Alliance for Clean Energy

Global clean energy supply chains, especially for EVs and batteries, are becoming more complex. In May 2026, Atlas Public Policy released a report examining global clean energy manufacturing investments announced between 2019 and 2025 and identified \$515 billion in battery investments and \$207 billion in EV investments during that period [34]. Chinese companies lead with 48 percent of all tracked battery investment announcements and 35 percent of all EV investment announcements. A few major players have concentrated investment in the U.S. EV and battery supply chains, while at least 43 Chinese companies have announced investments of at least \$1 billion in the EV and battery supply chain, compared with just 13 U.S. companies.

China’s 12th Five-Year Plan, which the government released in 2011, helped establish the country’s dominance of the global EV and battery supply chain. The plan identified technologies like EVs, solar panels, and batteries as “strategic emerging industries” [34].

This support enabled Chinese companies and provinces to rapidly expand production capacity, helping these manufacturers become globally competitive on cost and quality metrics, and capture more than 62 percent of global EV sales in 2025 [34]. For the United States, a more competitive domestic supply chain could reduce import exposure and support regional economic development, but it depends on sustained demand, stable policy signals, access to capital, workforce availability, and the ability of domestic producers to compete globally on cost and quality.

EV Sales and Market Share Trends

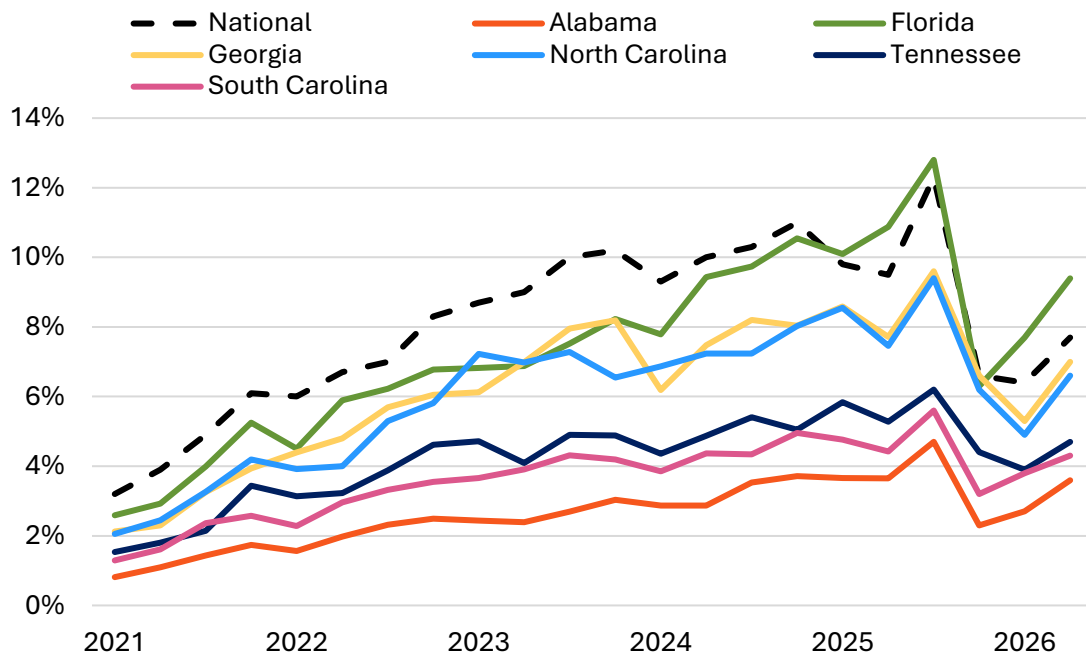
Nationally, new passenger electric vehicle (EV) sales fluctuated over the last 12 months, reaching a record high in Q3 2025 before declining to its lowest quarterly total since Q1 2022 in the following quarter (Q4 2025). Market uncertainty, changing tariff and regulatory conditions, vehicle offerings, and the expiration of the consumer-facing federal clean vehicle tax credit (30D) shaped these fluctuations.

Consumers appeared to have brought forward purchases ahead of the credit's expiration at the end of September 2025 to capture savings, helping drive record Q3 sales and Q4 lows (Q4 2025 saw the lowest new EV sales since Q3 2022). The credit supported new EV purchases by lowering upfront costs by up to \$7,500 [35]. Since then, the post-incentive market has tested underlying demand and automaker offerings, with EV sales volume and market share showing renewed growth beginning in Q2 2026.

Passenger EV Sales

By the end of Q2 2026, EV market share of new passenger vehicle sales in the Southeast reached 7.4 percent, though still lower than the 8.3 percent share recorded in Q2 2025. While most states in the Southeast still trail the national average, where EVs made up 7.9 percent of all new passenger sales in Q2 2026, Florida climbed ahead at 9.4 percent. Still, the gap between national passenger EV market share of new vehicle sales and that of several states in the region, particularly Georgia and North Carolina, has narrowed (Figure 4). Alabama once again had the lowest EV market share of new passenger vehicle sales at 3.6 percent in Q2 2026.

Figure 4. EV Sales Market Share for Passenger Vehicles in the Southeast

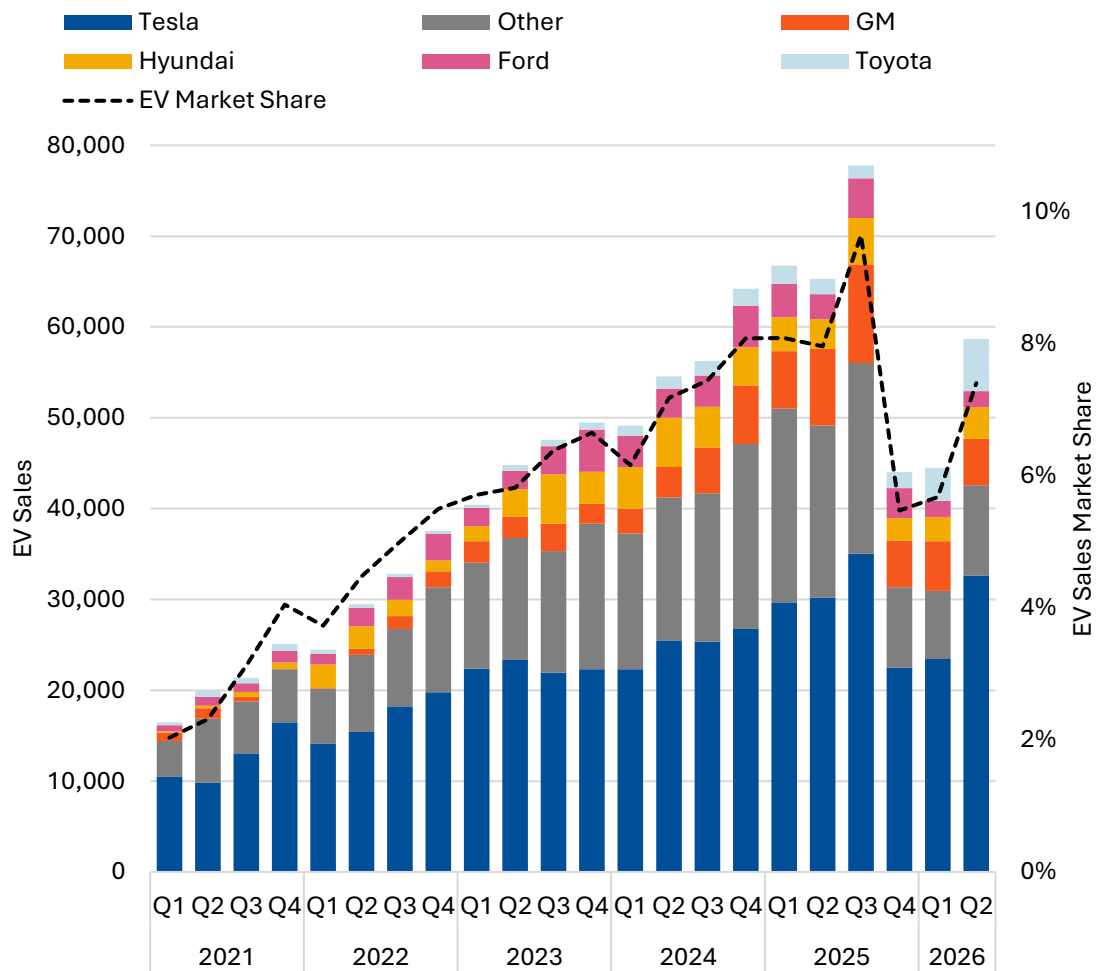


This figure depicts EV sales as a percentage of new passenger vehicle sales from 2021 to June 30, 2026. EV includes both BEV and PHEV sales.

Source: Atlas EV Hub [2] for the Southern Alliance for Clean Energy

Cumulative new passenger EV sales grew from 912,270 vehicles to 1,137,170 over the last 12 months, an increase of 224,900 vehicles, or approximately 25 percent. While Tesla's market share in the U.S. EV market has declined over the last few years, the automaker still holds a majority of the market in the Southeast—approximately 50 percent. General Motors (11.8 percent) and Hyundai Motor Group (6.1 percent) also hold a notable share of the new passenger EV market over the last 12 months. Figure 5 presents a breakdown of quarterly new passenger EV sales in the Southeast and the leading automakers.

Figure 5. New Passenger EV Sales in the Southeast



This figure shows new passenger EV sales over time in the Southeast through June 30, 2026. The EV share line depicts the share of EV sales compared to all new passenger vehicle sales.

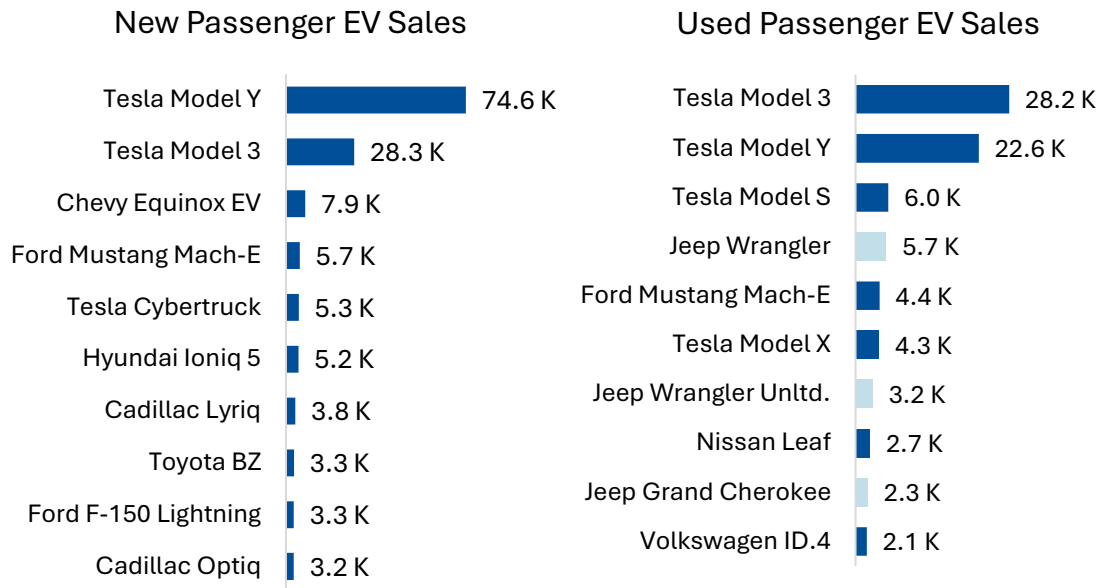
Source: Atlas EV Hub [2] for the Southern Alliance for Clean Energy

Auto market analysts point out that consumers looking to buy a new vehicle in mid-2026 face a loss of purchasing power, as the cost of living has risen faster than income [36]. EV drivers, however, enjoy two key advantages compared to gasoline vehicle drivers: the potential for lower maintenance and repair costs and lower fuel costs [37]. There are also ongoing gas price fluctuations following American and Israeli attacks on Iran that disrupted Middle East oil flows in the spring of 2026, with renewed uncertainty after Iran moved again

to halt shipping through the Strait of Hormuz in July [38]. Gasoline prices will remain elevated if these disruptions in the oil market persist [39].

With EV driver satisfaction at an all-time high, new EV options being introduced into the market, and used EV inventory expected to grow as more vehicles come off lease, consumers have more options to purchase both new and used EVs [40] [41]. While the new passenger EV market has faced challenges, the used passenger EV market has seen consistent growth. In the last 12 months, the Southeast recorded 140,850 used EV sales, a 34 percent increase from the 12 months prior. In the new passenger EV market, the top 10 models were all battery electric vehicles (BEVs), with Tesla Model Y and 3 remaining popular, followed by offerings from Chevrolet, Ford, and Hyundai (Figure 6). In the used EV market, the most popular models were BEVs, but three plug-in hybrid electric vehicle (PHEV) offerings, all Jeep brands, were also among the top ten models sold in the Southeast. Like the new EV market, Tesla largely dominates the used EV market, with Tesla vehicles accounting for the four top-selling models in the region.

Figure 6. Top 10 Passenger EV Makes and Models in the Southeast from July 2025 through June 2026



This figure depicts the top 10 new passenger EV makes and models by new sales from July 1, 2025 through June 30, 2026. Dark blue shading indicates BEVs and light blue indicates PHEVs.

Source: Atlas EV Hub [2] for the Southern Alliance for Clean Energy

Commercial EV Sales

On the Southeast commercial fleet vehicle side, new quarterly commercial EV sales declined between Q3 2025 and Q1 2026, dropping from 7.3 to 1.0 percent market share. Sales ticked up slightly in Q2 2026, rebounding to a 4.8 percent new commercial EV sales market share. There are similar patterns in the national commercial EV market. The Southeast recorded just over 4,750 new commercial EV sales in the last 12 months, compared to 6,600 sales in the 12 months prior. The Rivian EDV 700 and Ford E-Transit 350 drive most new commercial EV sales.

Global EV Sales

In 2025, consumers worldwide purchased over 20 million new EVs, 20 percent more than in 2024 [42]. Electric vehicles accounted for one in four new cars purchased globally. Although

growth was sizeable, it was uneven. China led global EV sales with 13.2 million vehicles, compared with 4.2 million in Europe and 1.5 million in the United States. Beyond its domestic market, China exerts significant influence on EV adoption worldwide as the world's largest EV exporter.

Consumers in the United States remain insulated from China's emerging EV dominance because the United States imposes 100 percent vehicle tariffs on imports from China. Additionally, in June 2026, the Department of Commerce laid out new rules to restrict vehicle imports from China due to concerns about consumer safety and national security [43]. The challenge for government officials around the world is to strike a balance between supporting domestic production and domestic automakers and meeting consumer needs that are drawn to high-quality, affordable Chinese EVs. Recent experiments in Canada and the European Union (EU) may hold clues about the best pathway forward [44].

Even though the United States has lower rates of EV adoption than some peer countries in Europe and Asia, the gross volume of EV sales in large markets like the United States matters. Norway, where EVs account for the highest market share at 96 percent, recorded 179,550 new passenger EV sales [45]. During the same period, the United States, where new passenger EV sales reached a 9 percent market share, recorded 1.5 million passenger EV sales.

Charging Deployment

To support the Southeast's growing electric vehicle (EV) market, public agencies, utilities, charging providers, fleets, automakers, and other private-sector stakeholders are coordinating to build reliable, convenient charging infrastructure. The Southeast added an average of nearly 133 public charging stations per month over the past year, including approximately 86 stations with Level 2 charging and 47 stations with direct current fast charging (DCFC).

Between 2025 and 2026, EV charging companies such as ChargePoint, Ionna, and EVgo announced and deployed several hundred additional charging ports across the Southeast, expanding the region's DCFC network [46] [47] [48]. Public DCFC ports grew at more than twice the rate of Level 2 ports over the past year. While most EV charging occurs at home, reliable and accessible public and workplace charging remain critical to supporting broader EV adoption [49] [50]. For those living in multifamily housing, affordable and accessible public charging access is even more critical [51]. Key actors continue to focus on a national

public EV charging corridor buildout, longer range EVs, freight electrification, and charger reliability to better support long-distance and commercial travel [52] [53] [54].

Automakers and EV charging companies have continued to transition from legacy charging connectors, such as the J1772 and CHAdeMO, to the North American Charging Standard (NACS) [55] [56] [50]. Tesla developed NACS, and SAE International, a global standards organization for the automotive industry, registered it as the J3400 standard. As an increasingly common connector type across all EV brands, makes, and models, NACS will expand network access and improve interoperability for EV drivers [57].

Table 2. Ports Installed by Connector Type in the Southeast

Connector Type	J1772	NACS (L2)	CHAdeMO	CCS	NACS (DCFC)
Port Count	21,085	2,231	1,996	5,298	7,319
Charger Compatibility	L2	L2	DCFC	DCFC	DCFC

The U.S. EV charging market uses several connector standards: J1772 and NACS for Level 2 (L2) charging and CCS, NACS, and CHAdeMO for DCFC [50]. Connector counts may overlap because some ports support multiple connectors. Data are through June 30, 2026.

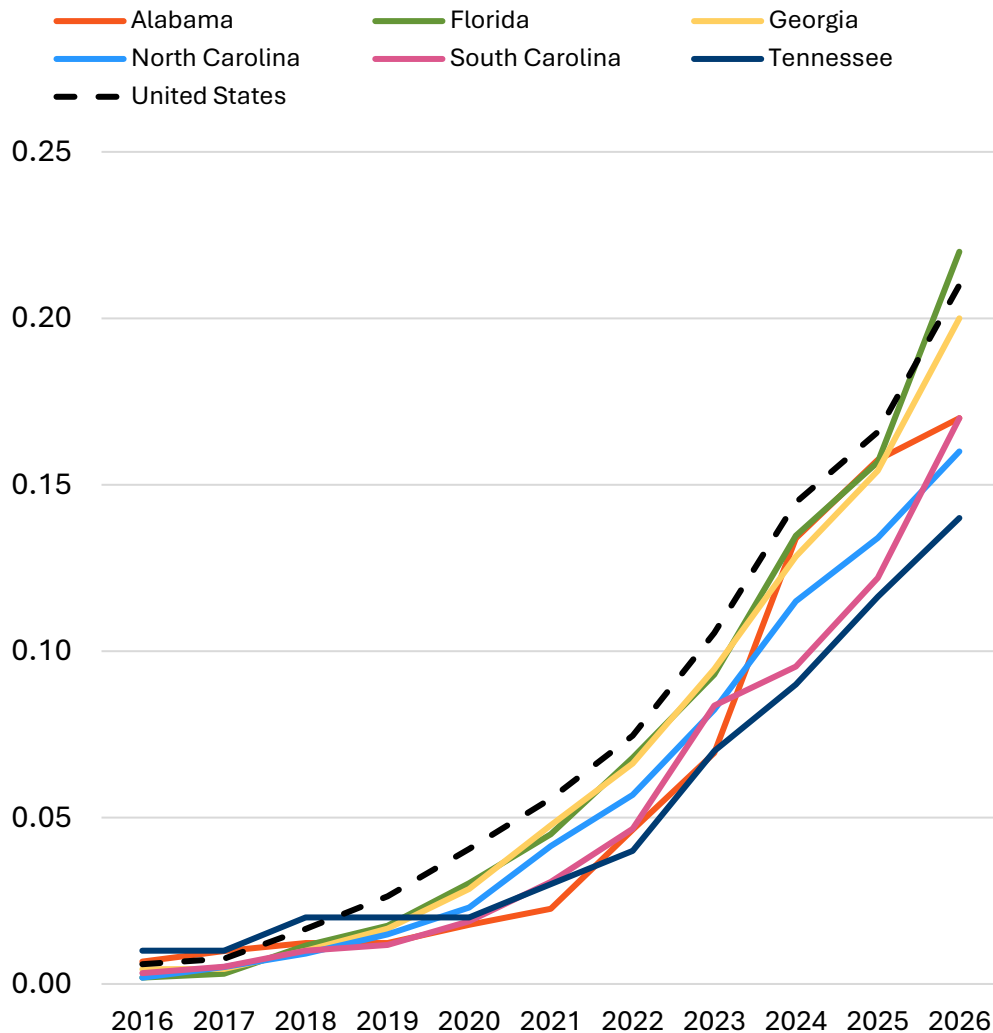
Source: Atlas EV Hub for the Southern Alliance for Clean Energy [2]

DCFC Leads Charging Growth

While Level 2 charging remains critical, recent investments have increasingly focused on DCFC deployments. DCFC ports expanded by about 2,470 new ports, a 28 percent increase from the previous year. Moreover, DCFC ports accounted for more than half of all new ports added over the past 12 months and grew more than twice as fast as Level 2 ports. The Southeast reached a significant milestone over the past year, surpassing 10,000 public DCFC ports, reaching approximately 11,400 operational ports through June 30, 2026. South Carolina and Florida had the greatest growth rate increases at 37 percent. Florida leads the region in both total DCFC ports and DCFC ports per 1,000 people, while Georgia ranks second in charging availability on a per-capita basis. Florida's DCFC count per capita slightly exceeds the national average, while the rest of the Southeast continues to lag in

proportional DCFC deployment. Last year's report highlighted Alabama's 81 percent increase in DCFC infrastructure over six years; the following year, growth slowed, with the state's DCFC port count rising just 11 percent year over year (Figure 7).

Figure 7. Cumulative DCFC Ports per 1,000 People in the Southeast compared to National Average



This figure depicts the steep rise in cumulative DCFC ports per 1,000 people that Southeast states installed from 2014 onward, alongside the national average. The figure includes only stations that remain active today and organizes them by installation date. Florida and Alabama converge into a single line in 2024-2025. South Carolina and Alabama also converge in 2026. Data are through June 30, 2026.

Source: Atlas EV Hub [2] for the Southern Alliance for Clean Energy

Level 2 Charging Continues to Expand

The growth of Level 2 charger deployment in the region was 12 percent year over year (Table 3). Alabama and Georgia tied for the highest year-over-year growth in Level 2 chargers (19 percent), followed by Florida (14 percent). Florida had the most cumulative Level 2 ports in the region at 9,907, or 43 percent of all Level 2 ports deployed in the Southeast. The region's growth rates in both Level 2 and DCFC ports exceeded national averages, but the Southeast still trails the nation in total charging ports and DCFC ports per 1,000 people. The gap is notably smaller for DCFC deployment than for overall charging infrastructure (Table 3).

Table 3. Charging Ports in the Southeast

State	DCFC Ports (% Change YOY)	DCFC Ports per 1,000 People	Level 2 Ports (% Change YOY)	Level 2 Ports per 1,000 People	Total Ports per 1,000 People
Alabama	890 (11%)	0.17	850 (19%)	0.17	0.34
Florida	4,784 (37%)	0.22	9,907 (14%)	0.44	0.65
Georgia	2,132 (27%)	0.20	5,195 (19%)	0.48	0.67
North Carolina	1,736 (18%)	0.16	3,839 (3%)	0.35	0.52
South Carolina	889 (37%)	0.17	1,132 (6%)	0.20	0.36
Tennessee	966 (16%)	0.14	2,043 (8%)	0.28	0.42
Southeast	11,397 (28%)	0.19	22,966 (12%)	0.37	0.56
U.S. Total	72,010 (26%)	0.21	176,303 (10%)	0.52	0.73

Total ports include both DCFC and Level 2 ports. Data are through June 30, 2026.

Source: Atlas EV Hub [2] for the Southern Alliance for Clean Energy

The Need for Dedicated Medium- and Heavy-Duty Charging

Alongside charging infrastructure for passenger vehicles, the Southeast will need additional investment in medium- and heavy-duty (MDHD) charging to support fleet electrification. While current DCFC infrastructure can serve passenger vehicles and some smaller commercial fleets, larger MDHD vehicles require truck-accessible charging sites and significantly higher charging power. As of June 30, 2026, the Southeast had more than 90 public charging sites accessible to MDHD EVs, 50 percent more than the previous year; however, only two operational sites are dedicated specifically to MDHD trucks [58]. Atlas estimates that public agencies, private companies, and utilities have invested, awarded, or committed approximately \$366 million to support MDHD charging in the region, including more than \$53 million that state commissions approved over the past year [59].

Recent efforts have increasingly shifted from planning toward implementation, guided by the Joint Office of Energy and Transportation's National Zero-Emission Freight Corridor Strategy, which prioritizes charging deployment along freight corridors and at truck depots within freight hubs [60]. Industry and research organizations have further emphasized shared, multi-fleet charging hubs and Megawatt Charging System infrastructure as key to supporting long-haul freight electrification [61] [62]. Atlas and SACE will continue to track progress on this front in forthcoming reports.

Utility Investment

Utilities remain a key source of electric vehicle (EV) infrastructure investment. Through June 30, 2026, state commissions had approved approximately \$7.3 billion in transportation electrification investments by investor-owned utilities (IOUs) nationwide, including just \$497 million, or about 7 percent, in the Southeast, although the region represents approximately 14 percent of the nation's population. Nationally, IOUs secured approval for nearly \$98 per customer in EV investments, compared to an average of just \$31 per customer across the Southeast. While all IOUs tracked in Table 4 trail the national average,

Duke Energy in North Carolina, Tampa Electric in Florida, Duke Energy in South Carolina, and Alabama Power in Alabama have particularly low rates of investment.³

Table 4. Investor-Owned Utility Investments in the Southeast⁴

Operating Company	State	Investment	Customers	Investment per Customer
Florida Power & Light	Florida	\$205,000,000	5,811,951	\$35
Georgia Power Company	Georgia	\$144,150,000	2,735,271	\$53
Duke Energy	Florida	\$112,159,946	1,968,212	\$57
Duke Energy	North Carolina	\$24,714,675	3,900,000	\$6
Duke Energy	South Carolina	\$8,830,000	870,600	\$10
Tampa Electric	Florida	\$2,300,000	834,144	\$3
U.S. Total		\$7,294,945,594	74,229,883	\$98

The report draws Duke Energy customer data in North and South Carolina from a Duke Energy fact sheet dated April 1, 2026 (Duke Energy, 2026) [63]. The table excludes Alabama Power because the company did not submit its EV programs to the state's Public Service Commission. Retroactive updates based on newly available or newly identified regulatory decisions may cause some figures to exceed those reported last year. Data are through June 30, 2026.

Source: Atlas EV Hub [2] for the Southern Alliance for Clean Energy

³ Because this comparison includes only commission-approved IOU investments, it excludes electric cooperatives, municipal utilities, unapproved proposals, and utility spending that does not require commission approval.

⁴ Investment reflects utility commission-approved budgets/caps or explicit regulatory-asset authorizations during the study window. For tariffed, uncapped programs (e.g., Duke Energy's make-ready programs in North Carolina and South Carolina), we have historically excluded spend-to-date reported in utility status filings to maintain cross-state comparability. Does not include IOUs that have not announced investment. However, we recognize that spending on tariffed, uncapped programs amounts to valuable investments made by utilities and, as those programs mature, we may include them in future reports.

Over the past year in the Southeast, only the Georgia Public Service Commission approved a transportation electrification filing associated with new investment. In July 2025, the Georgia Public Service Commission approved an extension of Georgia Power's electric transportation programs at current funding levels, including \$52 million for its Make Ready program and nearly \$6 million for its Community Charging Program, which expands EV charging access in underserved communities [64] [65]. Georgia Power's investment per customer rose from \$30 to \$53 over the last 12 months following the approval of these two charging programs.

Given growing electricity demand, particularly from data centers, managed charging and time-of-use rates can help accommodate load growth by shifting EV charging away from peak periods and maximizing the use of existing grid infrastructure [66] [67] [68]. In July 2025, North Carolina approved Duke Energy's EV-specific time-of-use rate pilots, which encourage overnight charging through lower off-peak electricity prices, while Georgia approved Georgia Power's Vehicle-to-Everything (V2X) pilot that will use electric school buses in 10 public school districts and bidirectional charging technology to evaluate vehicle-to-grid applications and support grid reliability during peak demand periods [69] [65]. The Southeast is also beginning to deploy managed charging programs, with Duke Energy operating commission-approved managed charging pilots and programs in North Carolina, South Carolina, and Florida [70]. While these efforts represent progress, the Southeast still lags behind some other states in deploying comprehensive transportation electrification strategies that directly address load growth [71] [72]. SACE's ET Utility Programs Tracker can be used to identify programs that reduce infrastructure installation and energy costs for commercial and residential customers [73].

Public Funding

In the last 12 months, federal agencies did not award or allocate any new transportation electrification funding to Southeast states. During the preceding 12 months, the outgoing Biden administration awarded the Southeast \$336 million in new funding. Additionally, the Trump administration continues to face legal battles and other challenges over its efforts to freeze and rescind transportation electrification funding that federal agencies awarded through the Infrastructure Investment and Jobs Act (IIJA) and Inflation Reduction Act (IRA) [74] [75]. Despite this, some programs have continued to progress awards by outlaying

funds already obligated and obligating funds unimpacted by freezes or rescissions.⁵ This funding has supported electric vehicle (EV) charging infrastructure, electric school buses, and other transportation electrification initiatives.

States meanwhile have awarded minimal funding for projects, with only North Carolina and Tennessee having introduced or awarded new funding during this reporting period.⁶ Both states awarded funds from their respective Volkswagen (VW) Settlement allocations. North Carolina awarded nearly \$2 million in VW Settlement funds for 27 publicly accessible charging ports in August 2025, while Tennessee awarded \$12.4 million in March 2026 to school districts and local transportation entities to replace aging medium- and heavy-duty vehicles with all-electric ones [76] [77]. Later in July 2026, Tennessee awarded approximately \$2.7 million in total grant funding from the state’s VW Settlement to four charging companies to install 22 DCFC stations [78]. Table 5 details the amount of funding originally allocated, awarded, or made available to Southeast states under IRA and IIJA and shows the significance of that funding compared with state awards.

Table 5. Key Indicators for Public Funding for EVs in the Southeast Before Trump Administration Actions

State	State Funding for Electric Transportation (millions)	State Funding for Electric Transportation per Capita	Federal Funding for Electric Transportation (millions)	Federal Funding for Electric Transportation per Capita
Alabama	\$10.4	\$2.06	\$171.8	\$33.78
Florida	\$147.4	\$6.59	\$661.9	\$29.52
Georgia	\$8.9	\$0.82	\$435.0	\$39.76
North Carolina	\$52.1	\$4.86	\$428.1	\$39.89

⁵ Obligated refers to a legal commitment from the federal government to spend money and outlaid refers to actual disbursement of funds—money that has been paid out by the federal government.

⁶ Funding totals distinguish between federal funding (e.g., NEVI, CFI, DOE, and other federally funded programs) and state funding sources, including state appropriations, settlement funds such as the Volkswagen Environmental Mitigation Trust, and utility-funded programs.

State	State Funding for Electric Transportation (millions)	State Funding for Electric Transportation per Capita	Federal Funding for Electric Transportation (millions)	Federal Funding for Electric Transportation per Capita
South Carolina	\$2.3	\$0.43	\$232.2	\$43.85
Tennessee	\$42.2	\$5.98	\$308.4	\$43.64
U.S. Total	\$10,014.7	\$29.70	\$17,638.0	\$52.66

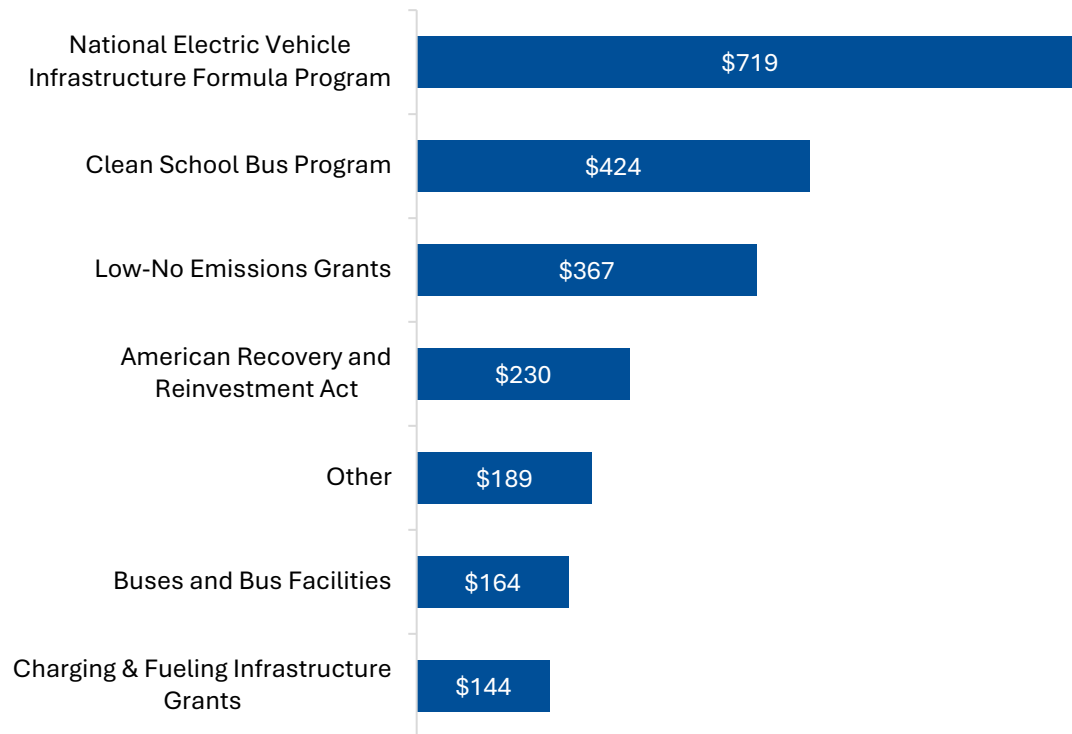
This table depicts public funding that federal and state agencies allocated, awarded, or made available to states in the Southeast. The data exclude rescissions or cancellations of individual awards. In this summary, state funding includes VW Settlement funds that states disbursed. Federal funding excludes loans or tax credits. Clarifications from state agencies and federal funding programs about applications for awarded or allocated funds informed retroactive updates to the funding data, which caused some figures to exceed those reported last year. Data are through June 30, 2026.

Source: Atlas EV Hub [2] for the Southern Alliance for Clean Energy

While Federal Funding is Cut, States Decide How to Spend Remaining Grants

For the purposes of this report, grant funds that have been allocated, awarded, or made available are collectively referred to as "awarded." By the end of June 2026, federal transportation electrification grant programs had awarded \$2.2 billion to Southeast states. Most of this funding has supported electric school buses and transit buses, EV charging infrastructure on highway corridors, and battery manufacturing, research, and development (Figure 8). Federal agencies awarded this funding before the second Trump administration began in January 2025 and have since frozen or canceled a significant amount. As a result, and because agencies provide limited public reporting, accurately accounting for funding flowing to states remains difficult. The totals shown in Figure 8 estimate originally announced federal support and should not be interpreted as a measure of funds currently available, obligated, or outlaid.

Figure 8. Federal Transportation Electrification Funding Awarded by Program in the Southeast (\$ millions) Before Trump Administration Actions



This figure depicts electric-only federal funding allocated, awarded, or made available. ‘Other’ includes Airport Zero Emission Vehicle and Infrastructure Pilot Program Grants, Clean Heavy-Duty Vehicles Grant Program, Congestion Mitigation and Air Quality Improvement (CMAQ), Diesel Emissions Reduction Act (DERA), RAISE/BUILD/TIGER (Rebuilding American Infrastructure with Sustainability and Equity formerly known as Better Utilizing Investments to Leverage Development and Transportation Investment Generating Economic Recovery), Small Business Innovation Research (SBIR), and Vehicle Technologies Office (VTO) funding. This chart does not include loans or tax credits. This chart excludes funds that agencies rescinded or canceled. Data are through June 30, 2026.

Source: Atlas EV Hub [2] for the Southern Alliance for Clean Energy

Over the past 12 months, federal agencies awarded no new funding to Southeast states, while provisions in the Unleashing American Energy executive order and the One Big Beautiful Bill Act (OBBBA), which Congress enacted in July 2025, subjected some IRA-funded programs to freezes and rescissions [79] [80] [81]. The cuts affected the National Electric Vehicle Infrastructure (NEVI) program, the Clean Heavy-Duty Vehicles program,

Diesel Emissions Reduction Act (DERA) program, and some Transportation Technologies Office (TTO) programs (formerly the Vehicle Technologies Office).

Funding for Charging Infrastructure Remains Unclear, Except in North Carolina

NEVI and the Charging and Fueling Infrastructure (CFI) programs provide critical funding to build out necessary EV charging infrastructure. Public funding is crucial but is just one part of charging investment. Forthcoming analysis from Atlas Public Policy finds that for every \$1 in public funding invested in charging, approximately \$2 has been announced by the private sector.

Combined, NEVI and CFI promised \$863 million to states in the Southeast. The CFI program made \$144.4 million available to states in the Southeast to fund EV chargers and other low-emission fueling infrastructure, including hydrogen, propane, and compressed natural gas. The program awarded significant CFI funding for EV charging in the Southeast; however, it has remained frozen since February 2025, preventing states from using awarded funds. Sixteen states and the District of Columbia filed a lawsuit challenging the funding freeze [82]. Only obligated funds can move forward during this period, but because Georgia had obligated only one award when the freeze went into effect, the state risks losing access to the remaining funds [83].

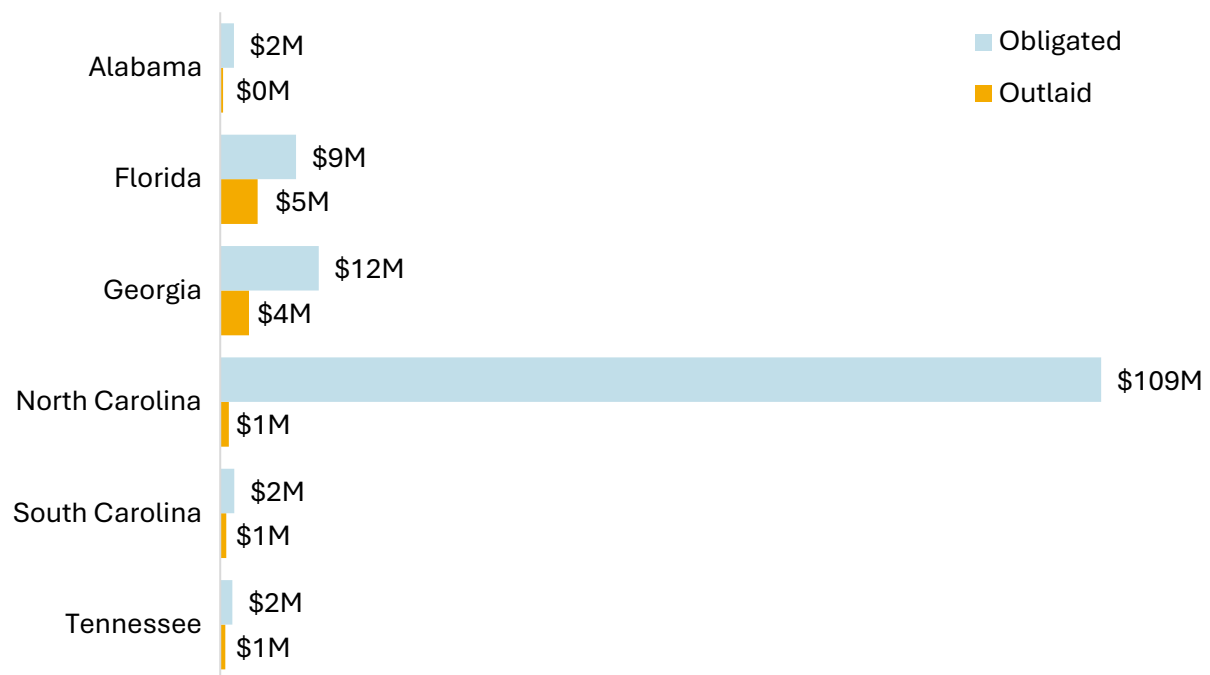
States in the Southeast have faced considerable roadblocks to accessing and disbursing their approved NEVI funding since the start of 2025. Since NEVI's suspension in February 2025, the program has gone through a funding freeze, lawsuit, and rescission, transforming the future of the program for states hoping to access funds for adding more EV chargers [84] [85] [86] [87]. After updating program guidance in August 2025, the federal government allowed states to submit their final plans for fiscal year 2026, providing a pathway for states to access the rest of their five-year NEVI funding. As of June 30, 2026, Federal Highway Administration (FHWA) had approved final annual NEVI plans for 42 states and territories [88]. FHWA approved final annual NEVI plans for every Southeast state except Florida [89]. In line with the new guidance, FHWA also granted 'fully built out' status to 12 states, giving those states additional flexibility on how to use remaining funds to meet their individual charging needs. North Carolina was the only state in the Southeast to achieve this status. During the funding pause and review of updated state NEVI plans, Congress rescinded \$503.8 million across 30 states and territories that had not yet obligated their full fiscal year 2022 allotments [90]. Congress rescinded about \$135.3 million from states in the Southeast, or more than a quarter of all rescinded NEVI funding. Florida had the second largest cut (\$45 million), behind only Texas. Using the average installation costs of EV chargers, this could result in about 330 fewer ports installed in Florida [91]. Alabama lost

Transportation Electrification in the Southeast

\$22 million, Georgia \$23 million, South Carolina \$19 million, and Tennessee \$26 million. North Carolina was the only state in the region to avoid funding rescissions.

As of December 2025, the Federal Highway Administration (FHWA) reported that it had obligated \$134 million in NEVI funding for Southeast states (Figure 9) [92]. North Carolina accounted for most of the obligated funding and was the only state in the region to have obligated its full allocation. By June 30, 2026, the federal government had outlaid just under \$11 million in NEVI funding for charging stations in the Southeast.

Figure 9. NEVI Funding by Status in the Southeast (\$ million)



This chart depicts funding obligated and outlaid from the National Electric Vehicle Infrastructure (NEVI) program in the Southeast. “Obligated” refers to a legal commitment from the federal government to spend money, and “outlaid” refers to the federal government’s actual disbursement of funds. Alabama’s outlaid NEVI funding was approximately \$363,000; the figure displays \$0 million due to rounding. Data are through June 30, 2026.

Source: Federal Highway Administration for the Southern Alliance for Clean Energy [92]

The FHWA has approved updated NEVI plans for all states in the Southeast except Florida, meaning states can continue building out EV charging, with North Carolina expected to

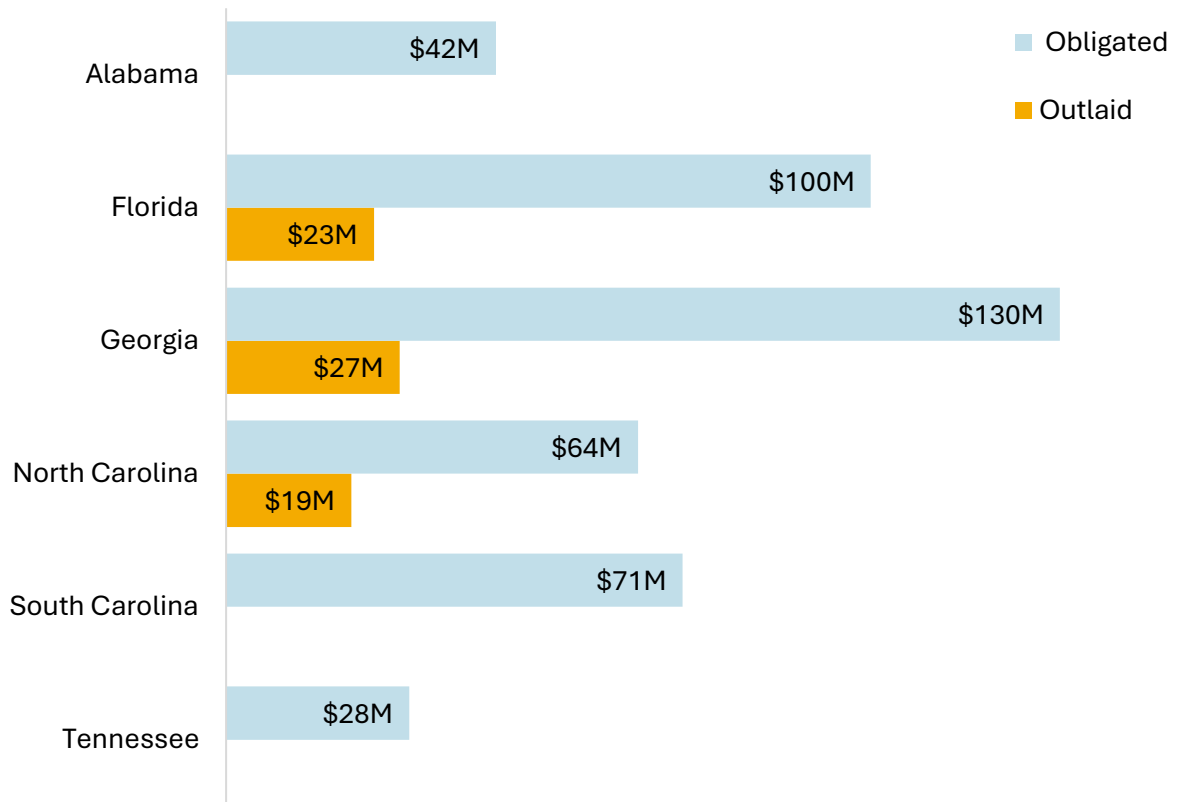
have more flexibility with its fully built out status. Recent reporting in Florida shows that the state is interested in using NEVI funding to instead build an Aerial Highway Network, though the feasibility of this option remains unknown [93]. Throughout the funding freeze and rescission process, some states released Requests for Proposals (RFPs) to spend the rescinded money, and in some cases awarded contracts, based on earlier funding expectations. It is unclear if states will keep those funding opportunities open after the rescissions by drawing on funding from other sources [91].

Electric School Buses Face Continued Uncertainty in the Southeast

Funding from IIJA and IRA has played a significant role in deploying medium- and heavy-duty (MDHD) EVs across the Southeast over the past few years, especially electric school buses and transit buses. Key programs include the Clean School Bus Program, the Low- and No-Emission Grant Program, and the Buses and Bus Facilities Program. In the last 12 months, federal agencies awarded no new funding from these programs for electric buses. However, the Federal Transit Administration (FTA) awarded more than \$2 billion in November 2025 under a joint Low-No and Buses and Bus Facilities round of awards for low-emissions buses: compressed natural gas, hybrid-electric (including diesel-electric hybrid), and renewable natural gas [94]. Under updated guidance, this round of funding for Low-No program recipients required a minimum of 25 percent of awarded funds to go toward low-emissions projects that are not zero-emission [95]. The awards announced in November did not fund the purchase of zero-emission buses, including hydrogen fuel-cell and battery-electric buses. Later in February 2026, the FTA awarded an additional \$390 million for 200 new buses and 11 bus facilities under the Buses and Bus Facilities program [96]. Similarly, the FTA did not award a single electric bus in this round of awards.

Since the beginning of 2025, the EPA has awarded no new funding under the Clean School Bus Program. In February 2026, the U.S. Environmental Protection Agency (EPA) announced that it would revamp the program and seek public input to develop a new funding opportunity later in 2026 [97]. EPA's announcement did not identify successful projects under the \$965 million 2024 rebate solicitation or state that prior applicants would necessarily need to reapply [98]. During the last 12 months, while the Clean School Bus program has awarded no new funding for electric school buses, states have remained active in implementation in the Southeast. Since the program was created, the federal government has obligated \$435 million and outlaid \$69 million in the region (Figure 10).

Figure 10. Funding Status of the Clean School Bus Program in the Southeast



This chart depicts the funding obligated and outlaid for the Clean School Bus Program in the Southeast, including rebates and grants for all rounds through June 30, 2026. Clean School Bus Program awards were overwhelmingly for electric buses [99]. We assume the vast majority of obligated and outlaid funding are dedicated to electric school buses. Funding awarded refers to funds non-contractually granted to a project or recipient. Obligated refers to a legal commitment from the federal government to spend money and outlaid refers to actual disbursement of funds—money that has been paid out by the federal government. Numbers in this visual are not additive.

Source: Atlas EV Hub [2] and Climate Program Portal [3] for the Southern Alliance for Clean Energy

State-level funding, including from the VW Settlement, remains limited in the Southeast, and states in the region have committed far less per capita than the national average, leaving transportation electrification projects more dependent on federal programs. Given recent federal freezes, rescissions, and policy changes, states in the region remain exposed to future federal policy and funding shifts.

Policy Highlights

Over the last 12 months, state-level transportation electrification policy in the Southeast has moved in different directions. Some policies reduced barriers for consumers, such as Tennessee’s protections for residents seeking to install electric vehicle (EV) chargers in homeowner association (HOA) communities. Others may make EV adoption more difficult, including Florida’s restrictions on future direct-to-consumer vehicle sales. This section summarizes consumer-facing policy developments related to vehicle sales, road funding, charging taxes, and other state actions.

Dealer Protection Laws and EVs

Many states established dealership franchise laws to regulate relationships between manufacturers and franchised dealers, and in part, to protect consumers in vehicle sales and service markets. These laws generally require licensed third-party dealers operating under established agreements with vehicle manufacturers, importers, or distributors to sell new vehicles [100]. EV-only automakers like Tesla, Rivian, Lucid, and Scout Motors have said these laws limit or bar their preferred direct-sales model, while dealer groups say that franchise laws protect local businesses, preserve service access, and provide consumer safeguards [101]. The policy debate centers on whether direct-sales restrictions primarily protect consumers and dealers, or limit competition and consumer choice [102].

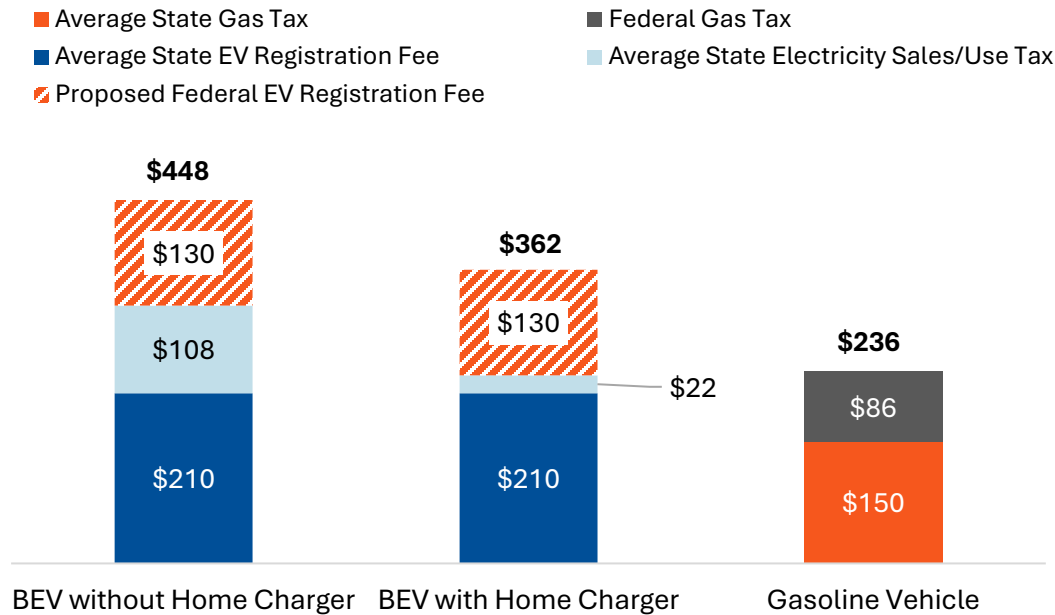
Several states with dealership franchise laws have now authorized carveouts for direct-to-consumer sales for EV-only automakers, starting with Tesla [103]. Currently, Florida and Tennessee are the only two states in the Southeast that allow any EV-only automakers to sell directly to consumers, with Georgia and North Carolina having carveouts for Tesla only [104] [105] [106]. Both Alabama and South Carolina prohibit all direct-to-consumer sales. In Florida, new legislation going into effect October 1st, 2026, will prevent all future automakers from selling directly to consumers if they plan to sell more than 1,000 vehicles per year [107]. It further requires that these automakers sell through at least three dealership groups to do business in Florida. This will apply to brands hoping to enter the market like Cupra, and the highly anticipated Scout Motors [108] [109].

EV and EV Charging Taxes

Since last year's report, EV registration and charging taxes remain a core topic of the transportation funding conversation. Federal highways are primarily funded by federal gas tax revenue. As the average vehicle becomes more efficient, highway construction costs continue to rise, and gas taxes remain unchanged since 1993, the gap between expenditures and revenue widens [110] [111] [112]. Some policymakers argue that as users of federally funded roads, EV drivers should pay into this fund as they do not contribute to the gas tax. In May 2026, proponents in Congress proposed an annual fee on battery electric vehicles (BEVs) of \$130 and \$35 for PHEVs, with the potential for this tax to increase over time [113]. Additionally, some members of Congress and the current administration have proposed suspending the federal gas tax to help offset fuel price increases due to the Iran war and its impacts on the global oil market [114]. Four states temporarily suspended their gas tax in 2026, including Georgia [115].

All states in the Southeast have implemented at least two EV-specific taxes, in addition to the existing fees and taxes for all drivers. These taxes reflect a legitimate policy challenge: as vehicles become more efficient and use less gasoline, gas tax revenue is no longer a proxy for road use. At the same time, EV-specific taxes can raise equity and adoption concerns when EV drivers pay more than comparable gasoline vehicle owners or face additional registration, charging, and sales tax burdens. Figure 11 compares estimated annual user fee costs for EV and gasoline vehicle drivers and shows the average EV driver could pay considerably more than their gasoline vehicle driving counterpart if a proposed federal EV fee is enacted.

Figure 11. EV Drivers in the Southeast Face Higher User Fee Costs than Gas Vehicle Drivers



The estimates exclude plug-in hybrid electric vehicles (PHEVs). This analysis assumes vehicles travel 12,000 miles per year, BEVs consume 4,000 kilowatt-hours of electricity per year, and gasoline vehicles have a fuel economy of 25.6 mpg. This analysis assumes drivers in the United States with access to home charging charge at home 80 percent of the time. State figures cover the states in scope of this report. Local, utility, and county taxes are not included. Data are from June 30, 2026, except sales/use tax, which is based on Electrify America prices from 2023.

Source: Atlas Public Policy [116]

Other Important Developments

Amid federal proposals for additional taxes levied on EVs, state governments have proposed bills that failed to pass in the last 12 months, including South Carolina’s attempt to increase its annual EV registration fee and Florida’s attempt to become the final state in the Southeast to establish an EV registration fee [117] [118]. For the third time, Georgia has delayed the implementation of its energy-based charging tax, now to January 2028 [119].

Meanwhile, some EV-related bills passed, including legislation in Florida prohibiting state agencies from using public funds to support “net zero policies”, which could affect EV adoption in the state’s fleet [120]. In a supportive move, the Tennessee legislature passed a

bill ensuring residents who are part of a HOA community can install EV chargers in their parking spaces [121].

Conclusion

The Southeast continues to play a leading role in building the nation's domestic electric vehicle (EV) and battery manufacturing base, but the past year showed that the sector is more exposed to shifting market conditions, federal policy changes, and project-level uncertainty than in previous years. New passenger EV adoption and charging deployment continued to advance, though growth was slower and more uneven than in prior reporting periods. New passenger EV sales declined after the expiration of the 30D tax credit, but sales began to recover through 2026. Used passenger EV sales also increased in the last year, expanding the pool of lower-cost options for consumers.

Direct current fast chargers (DCFC) represented a larger share of new public charging deployment than Level 2 charging over the past year. As demand for public charging grows, DCFC higher power output and shorter charging times make it increasingly attractive to drivers during daily commutes and longer trips. Even so, the Southeast continues to trail the national average on several charging access metrics, underscoring the need for continued investment in reliable and convenient charging infrastructure.

Federal agencies awarded no new transportation electrification funding to Southeast states during the reporting period and froze, delayed, rescinded, or revised guidance for several programs. Despite these setbacks, states and recipients continued using previously awarded funds that agencies had already obligated or otherwise protected to support projects across the region. State policy, a key driver for sustaining transportation electrification progress, has made small developments to reduce barriers for consumers, while other policy developments make EV adoption more difficult.

Looking ahead, the region will increasingly depend on the actions of states, utilities, manufacturers, charging providers, fleets, and consumers. The global EV market continues to grow, and the United States' ability to remain competitive will depend, in part, on stable policy and investment signals for sustained growth. While the Southeast faces a more uncertain environment than in prior years, its battery and EV manufacturing base, growing EV market, and expanding charging infrastructure network position the region to remain a major contributor to the nation's electric transportation future.

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