

Transportation Energy Markets

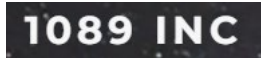
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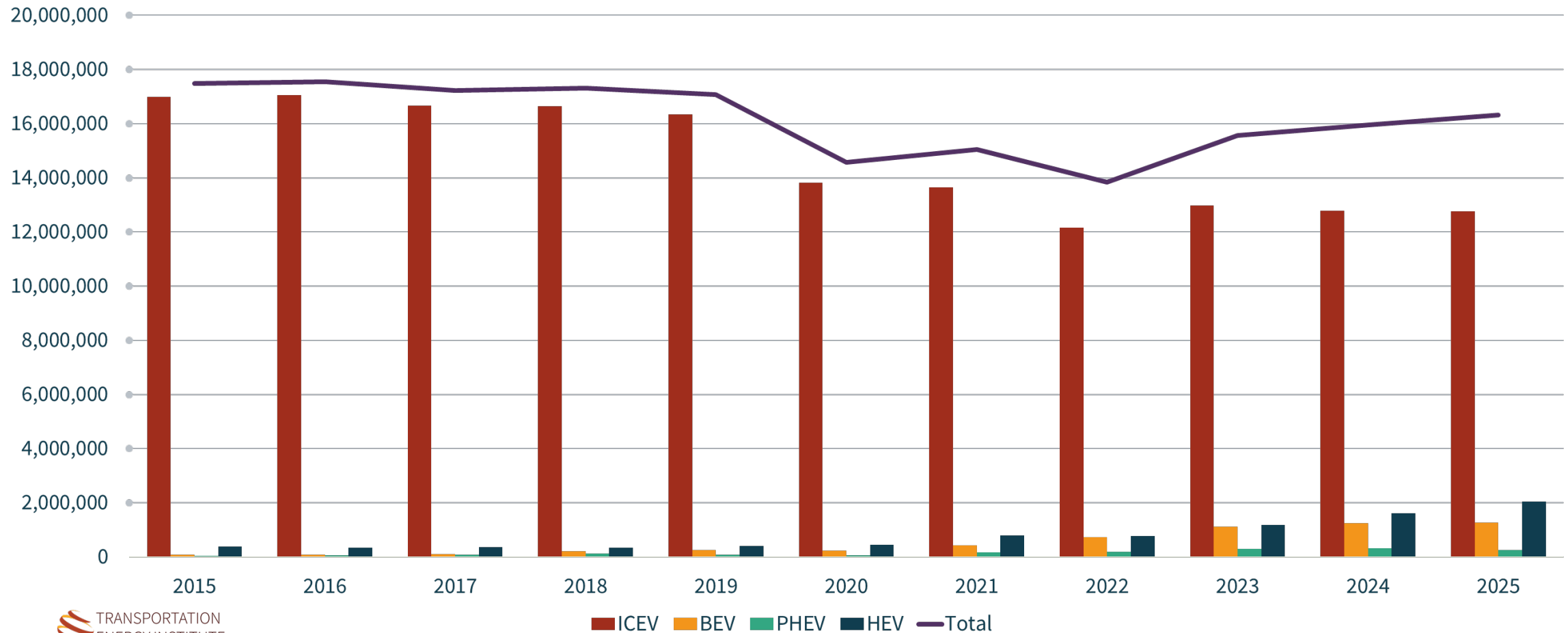
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Fleet becoming more diverse, but still mostly ICE

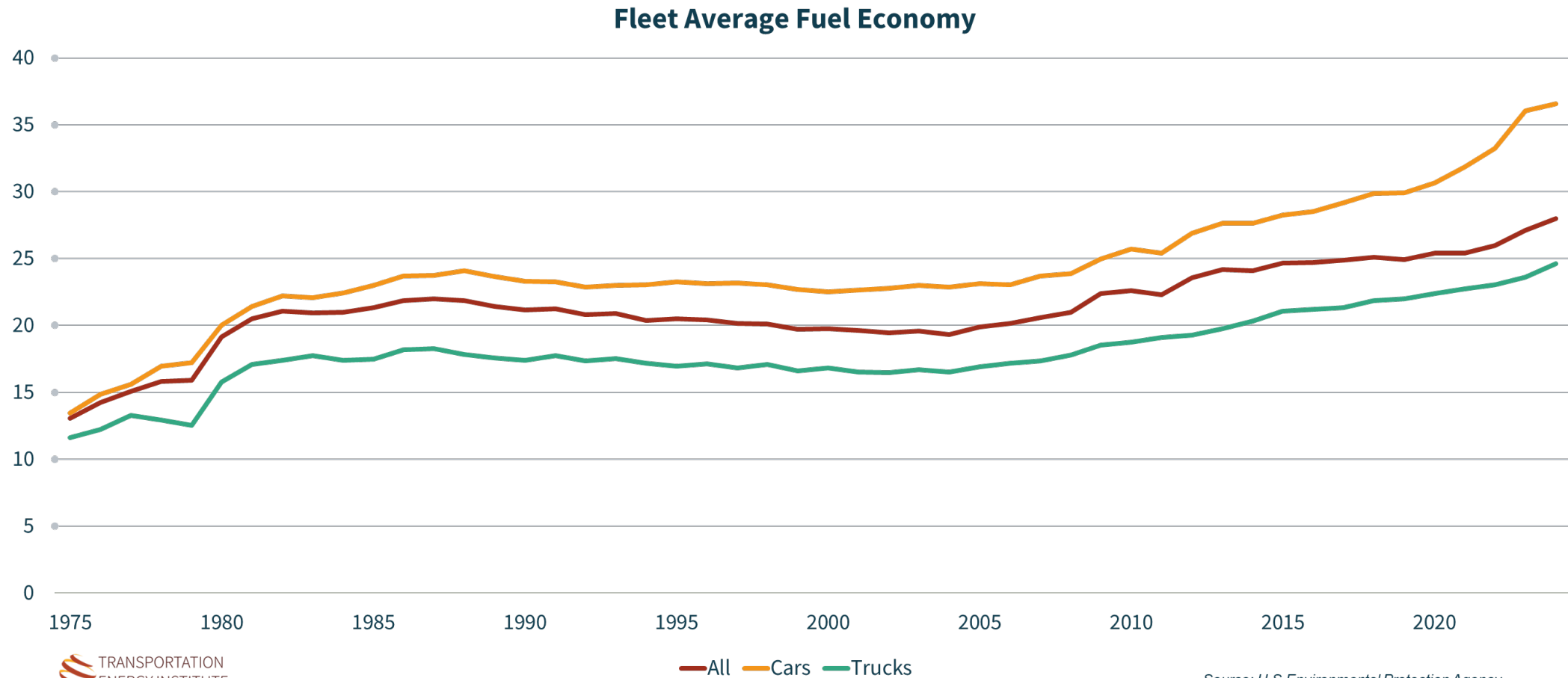
Despite recent expansion of EVs, vehicles with ICEs still accounted for 92.3% of sales in 2025.

U.S. Light Duty Vehicle Sales



MPG will continue to increase, what about trips?

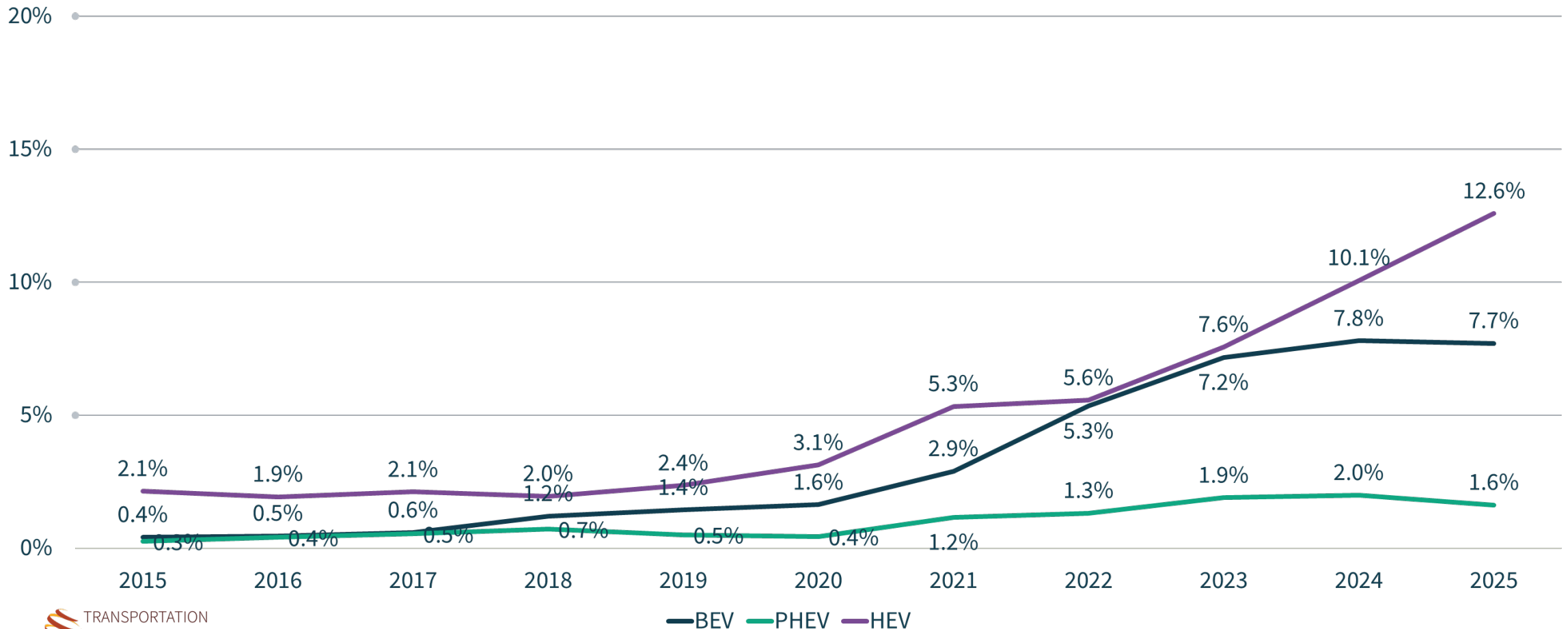
Even the new CAFE proposal imposes fuel efficiency hurdles on the industry



U.S. electrified vehicles = 21.9% of all LDV sales

Hybrids are the major story line in the U.S. – more than doubled share since 2022.

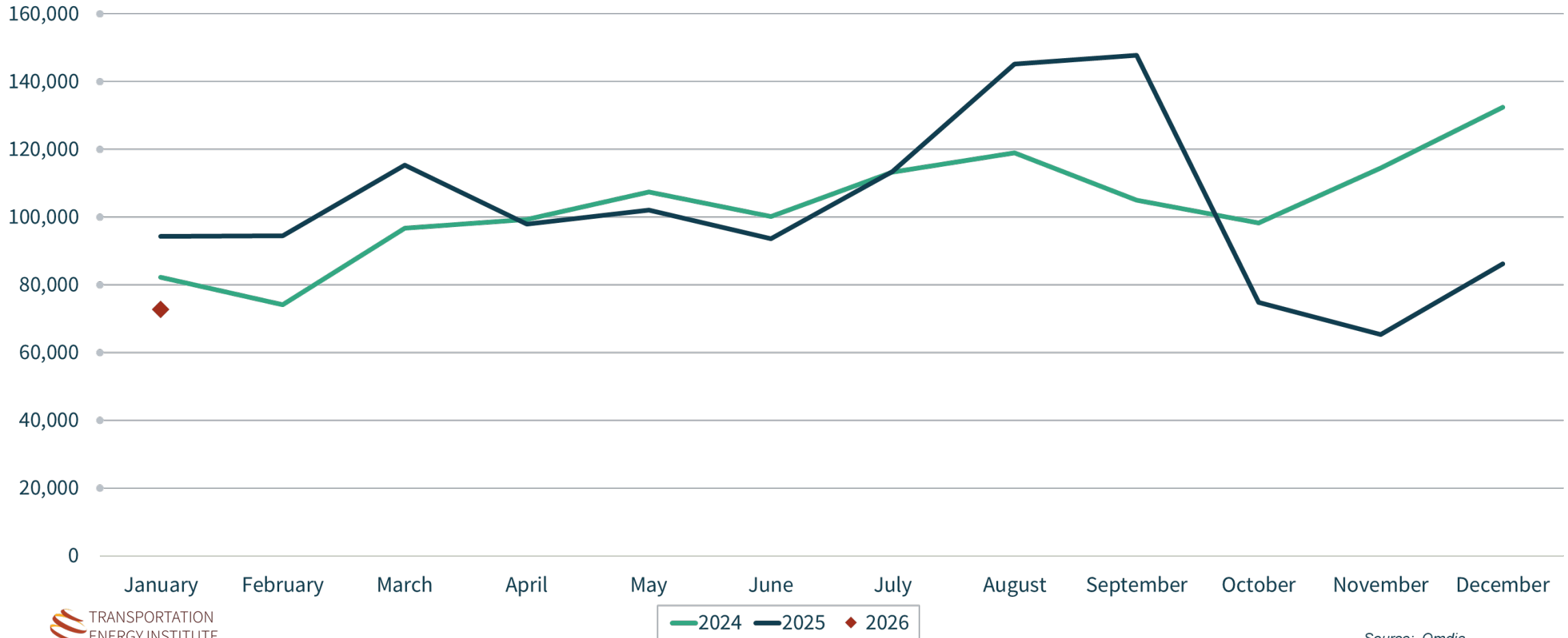
Share of Electrified LDV Sales



Tax credit expiration affected BEV sales

But there is historic evidence showing that sales are likely to recover after incentives are removed and did recover in December.

BEV Monthly Sales

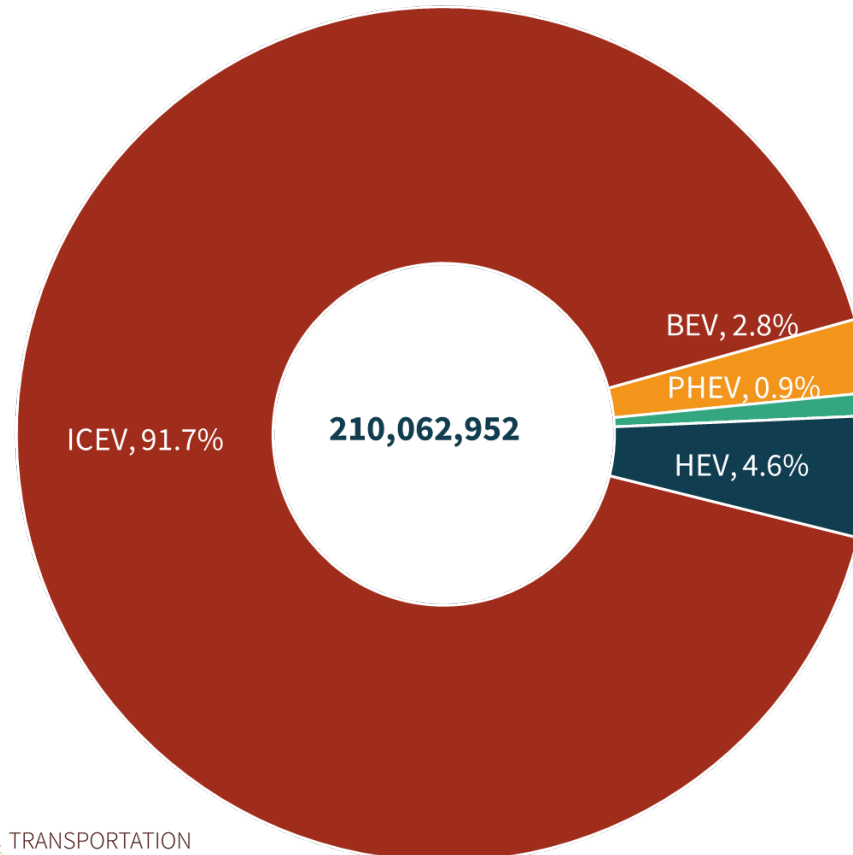


97.2% of vehicles sold past 13 years have ICEs

From 2013-2025, Americans purchased more than 210 million vehicles.

Of those, more than 204 million (97.2%) had a combustion engine.

Share of U.S. Light Duty Vehicle Sales
(2013 - 2025)



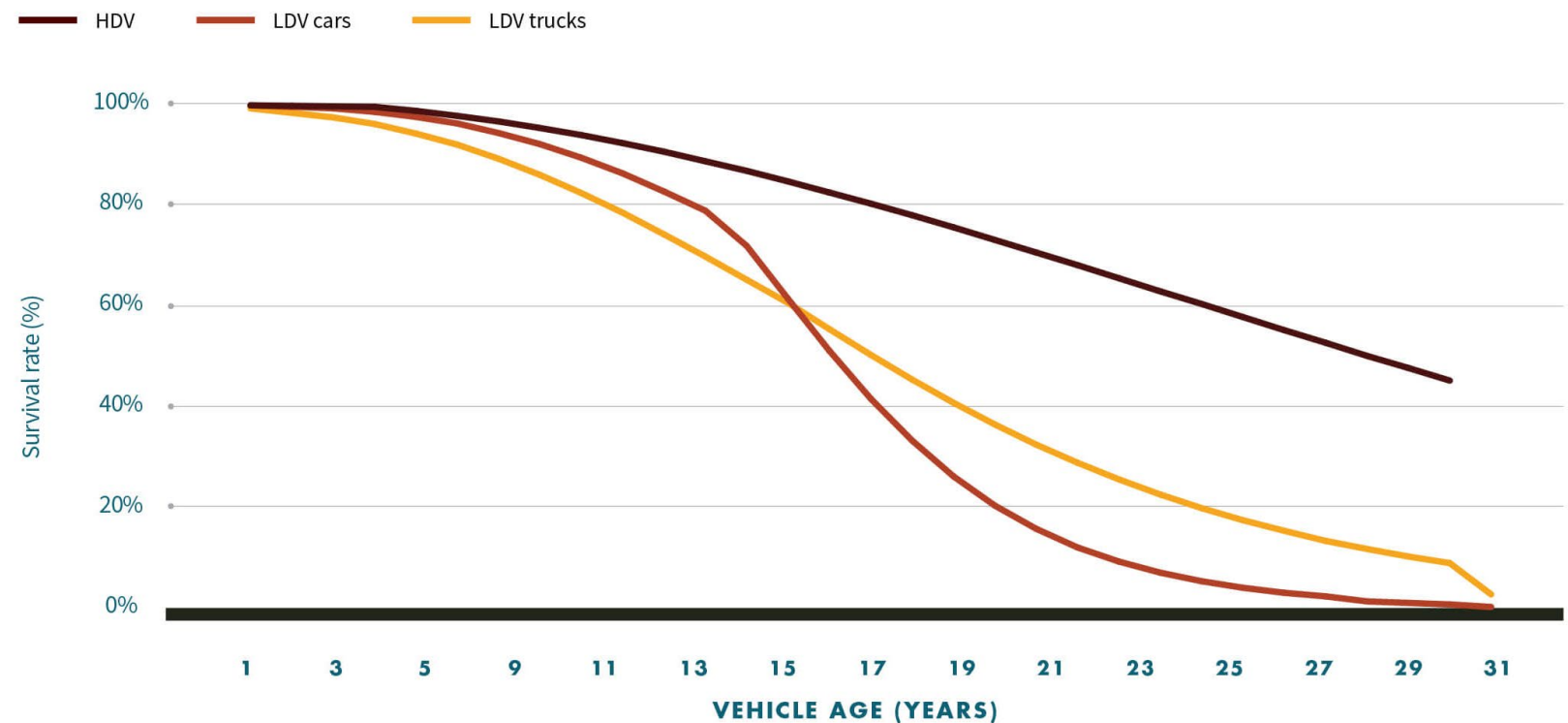
Vehicles survive a long time and current economics indicate a longer life lays ahead

Half of LDVs sold today will remain on the road in 16 years and others can stay in the market for more than 30 years.

Half of HDVs sold today will remain on the road in 27 years.

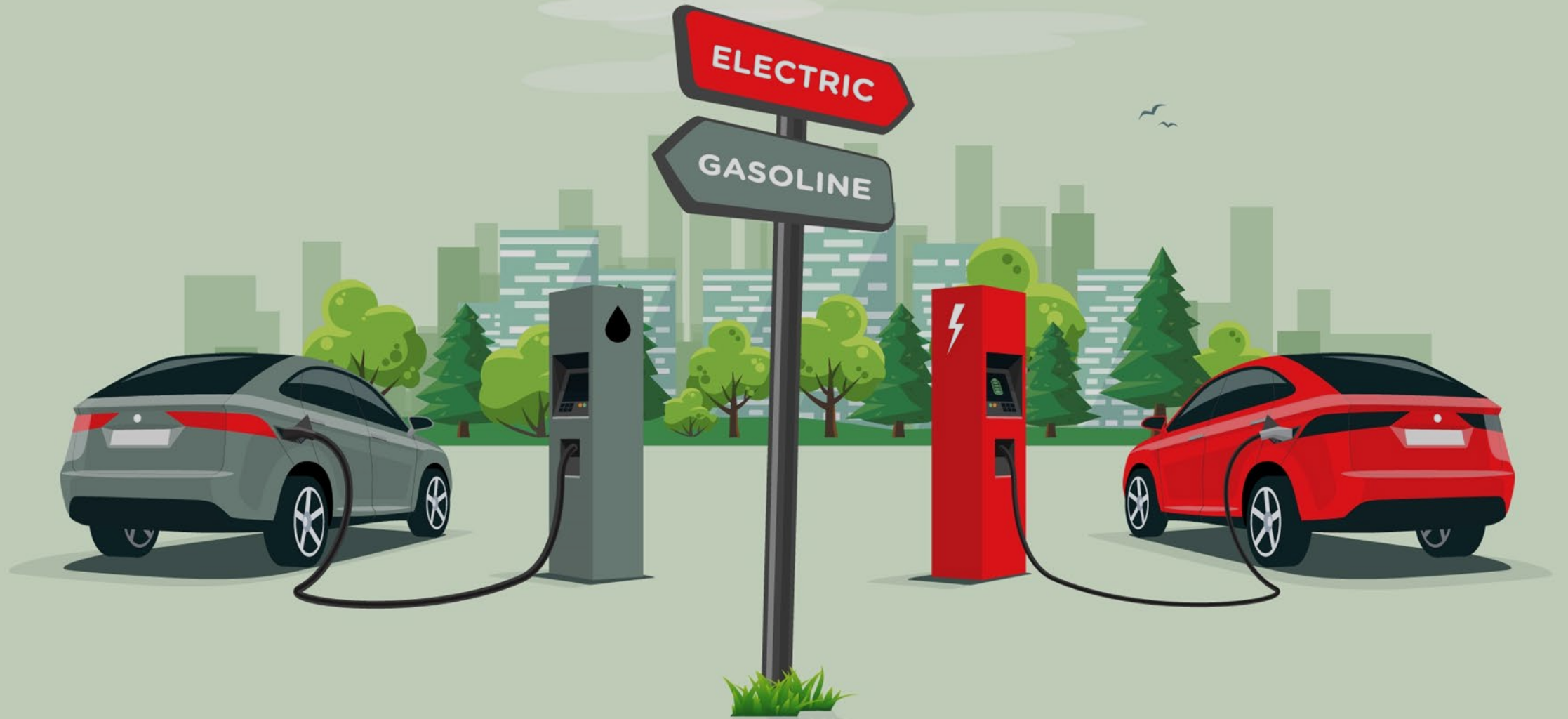
This means the market will continue to rely upon combustion engines and liquid fuels for many decades to come.

FIGURE 5. VEHICLE SURVIVAL RATE FOR CARS, TRUCKS, AND HEAVY-DUTY TRUCKS



Source: Oak Ridge National Laboratory Transportation Energy Data Book Edition 40, Tables 3.14, 3.15, 3.16.

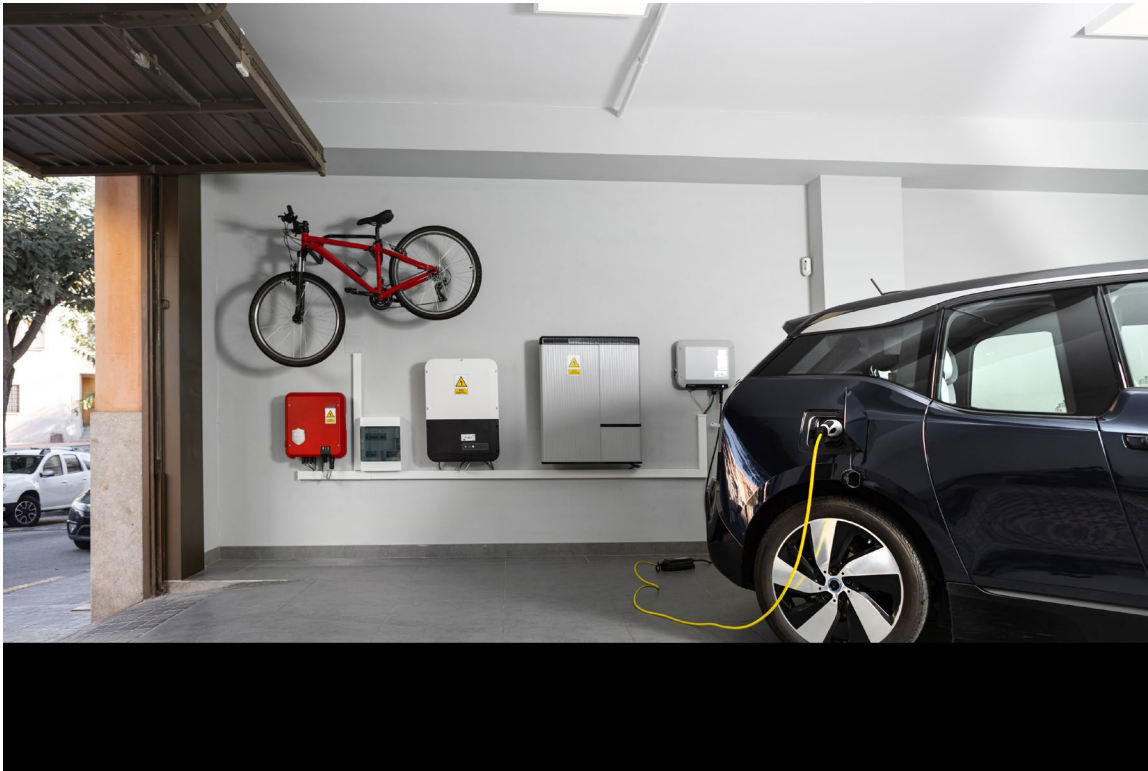
Convenience Stores Need Both



More than half EV sales were leased


Why should retailers care?

**Current EV Owner Profile:
Charge at Home 80%+**




**Expanding EV Owner Profile:
Where will they charge?**





Charging Analytics Program

Powered by  paren

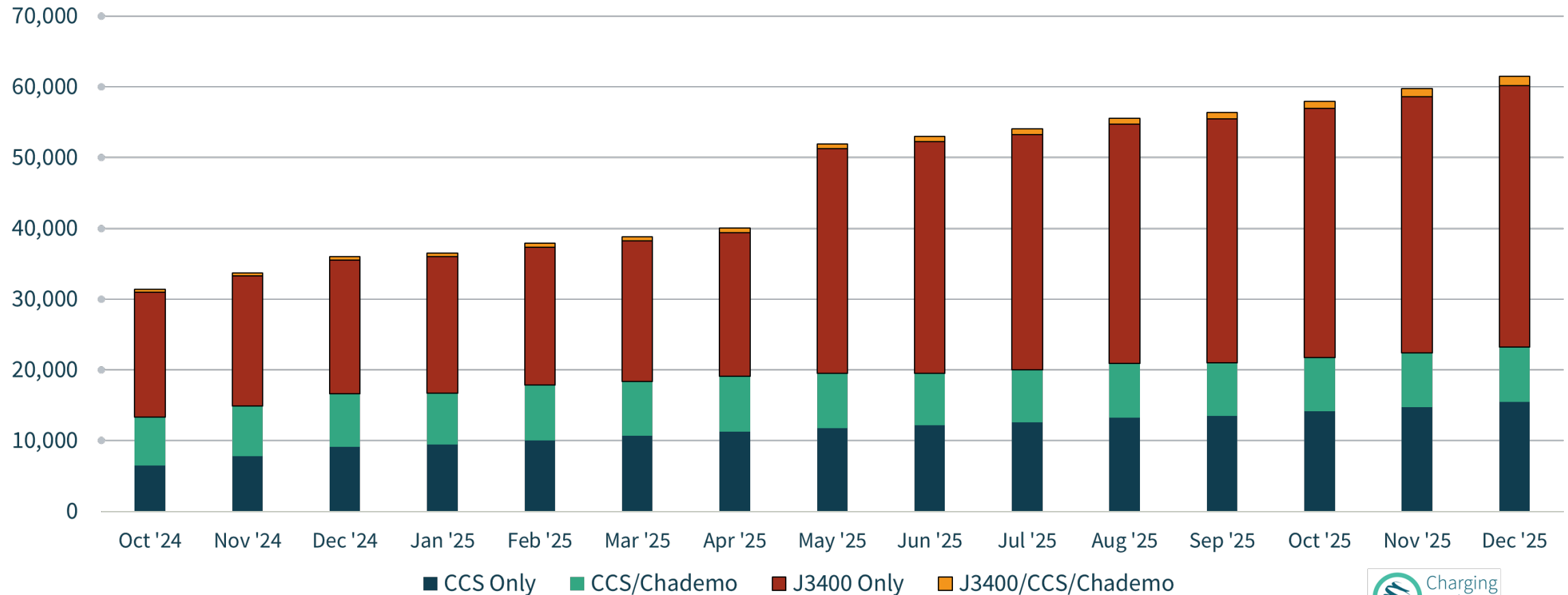
Leveraging DCFC Utilization Data to Evaluate Business Value

- 62,000+ charging ports
- 141 million sessions in 2025
- Utilization %
- Session Duration
- Sessions/Port/Month
- Chargers near c-stores, restaurants, grocery
- Chargers identified by peak power and connector type
- Chargers in top MSAs

Charging market is still in build-out phase

Total charger count is up 72% YoY and J3400 connectors are becoming the clear standard representing 75% of all charger ports. Meanwhile, utilization has remained steady.

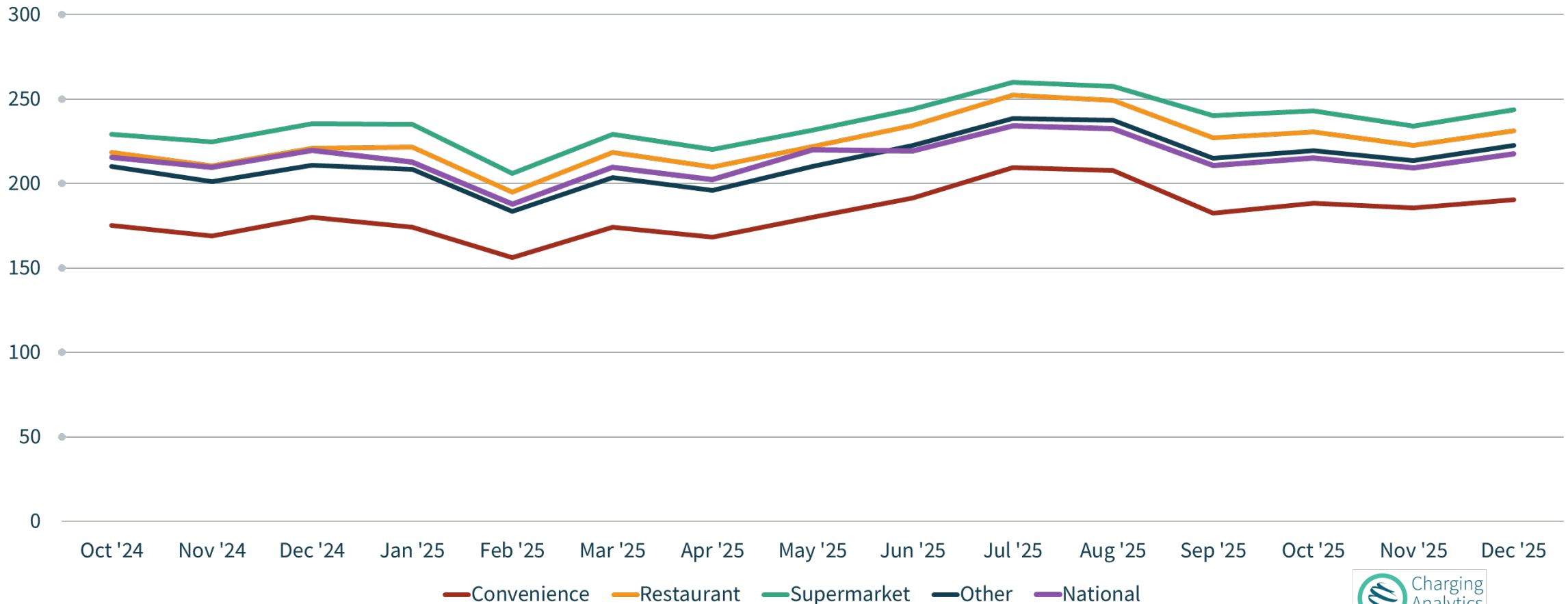
Total Chargers in Dataset by Connector Type



DCFC connectors average 214 sessions/mo.

And charging sessions last on average around 33 minutes. This equates to 118 hours of dwell time per port.

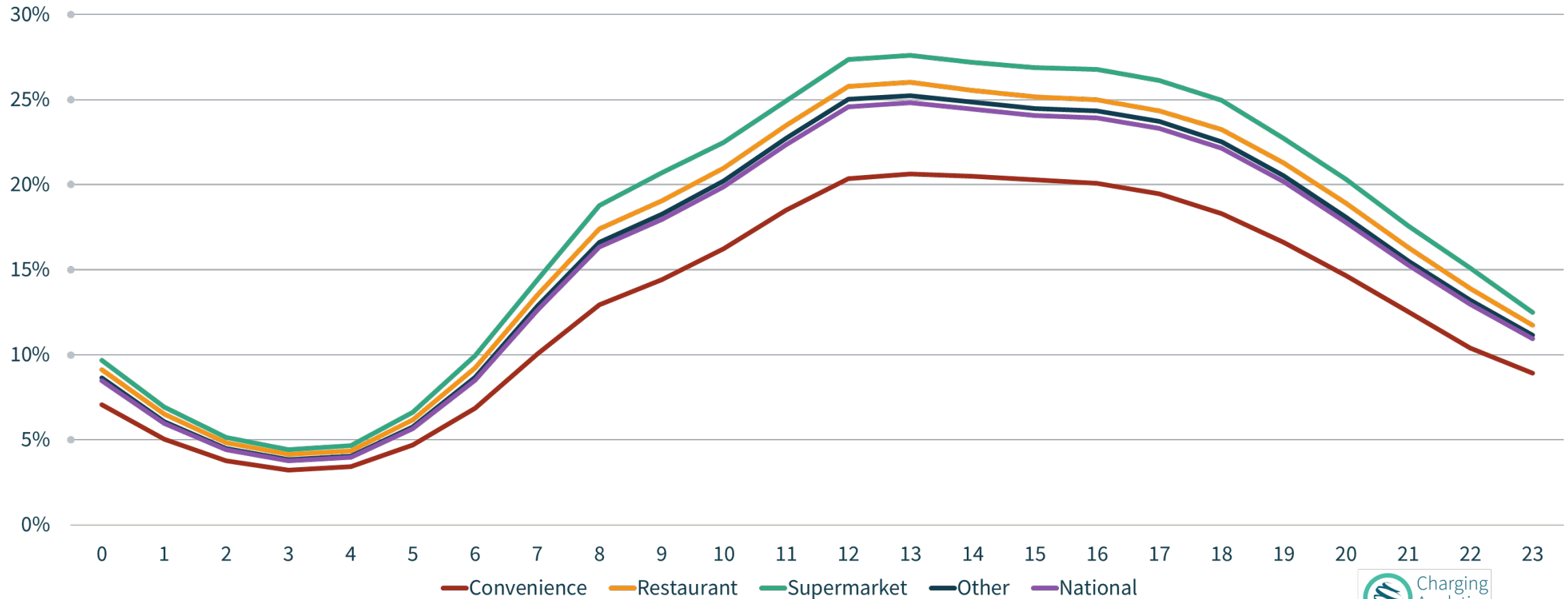
Sessions per Charger per Month



Chargers most used in early afternoon

C-store utilization averages 20.2% from Noon – 6 pm, compared with 13.2% in the morning and 14.5% at night

Average Utilization by Time of Day



The value of charging to a business

Average of 4.5 ports per CCS station = 422 hours

Average of 14.4 ports per J3400 station = 1,958 hours

Convenience Store – Assume 8 ports = 392 hours

Q3 Averages	Utilization	Peak Utilization (12 pm – 6 pm)	Session/ Month	Session Duration in Minutes	Total Time Charging per Port per Month in Hours
National	16.4%	24.2%	214	32.8	117
Convenience	13.5%	20.2%	188	30.7	96
Restaurant	17.3%	25.3%	228	32.5	124
Supermarket	18.5%	27.0%	240	33.0	132
J3400 Chargers	18.8%	27.7%	265	30.8	136
CCS Chargers	13.5%	20.2%	158	35.6	94

What's coming next?



Advanced technology and consumer journey



Final thoughts...

- ICEVs are not dead – far from it, but fuel efficiency will continue to improve and this will affect trips to convenience and gas stations
- EVs are not going away – the market is resizing and reshaping with new customers entering the market who will need public charging facilities more than the early movers
- Retailers must serve both customers – generating trips remains a strategic imperative
- The customer's path to purchase will start sooner in their journey and will leverage technology – retailers must engage and be part of that decision-making process or risk losing customer trips to more engage competitors