

High gas prices boost EV demand unevenly across red and blue states

Hybrid and zero-emission registrations climbed as gas prices rose universally in February. Red states grew fastest in proportional terms, but blue states added the most share, widening the absolute gap. Purple states gained least on both measures.

Electrified mix growth since gas prices rose, February to July 2026

+27%

+4.0 pp
Red states

+9%

+1.6 pp
Purple states

+23%

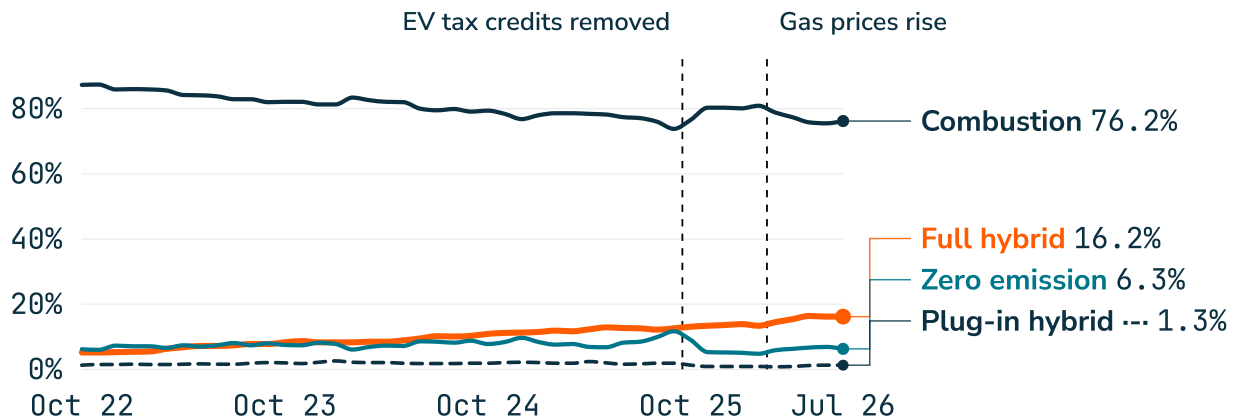
+5.7 pp
Blue states

- 01 The inflection is taking the hybrid option, not changing model
- 02 Blue states have the largest absolute swing, but red states have greater proportional growth
- 03 Western states lead adoption, interior states lag
- 04 EV share-gainers lean red, decliners lean blue
- 05 Longer-term shifts led by red, low-baseline states
- 06 After gas prices rise, EV gains skew to blue states
- 07 Growth tracks penetration baseline, not size of price shock

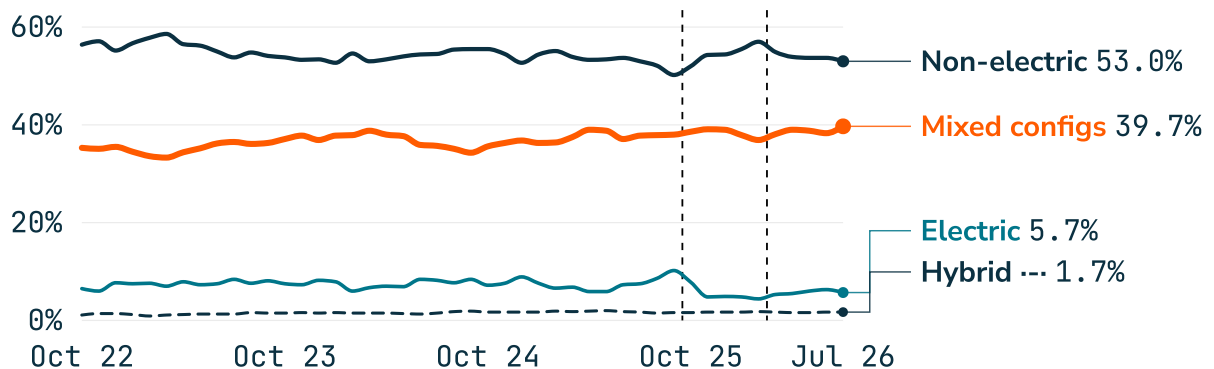
The inflection is taking the hybrid option, not changing model

Full hybrids have tripled their share since 2022. Combustion and mild-hybrid share fell 4.7 pp from February to July 2026, the fastest five-month drop in the series, erasing the decline in fuel-efficient registrations that followed the end of the federal EV tax credit. Year over year, zero-emission share is down 2.2 pp; full hybrids are up 3.6 pp. Models sold only as non-electric held share, so the gain is coming from buyers taking the hybrid configuration of models offered in more than one, not from models sold only as electric or hybrid.

By engine type



By model category



Blue states have the largest absolute swing, but red states have greater proportional growth

Blue states hold the highest level and the widest absolute swings: a 9.6 pp drop into February, then a 5.7 pp rebound. Blue and purple states had greater proportional declines following the end of the EV tax credit, but since February hybrid/electric mix has grown 27% in red states vs. 23% in blue states and 9% in purple states.

+1.97%

Red states · mean
monthly log change

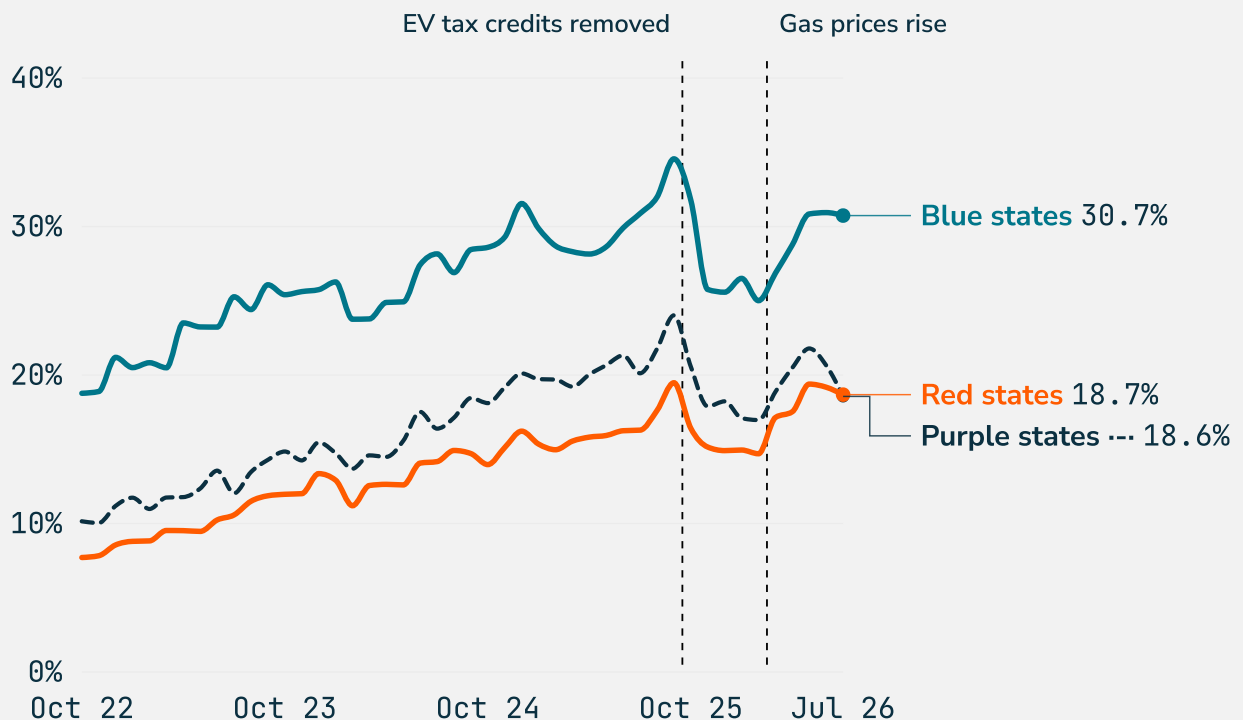
+1.34%

Purple states · mean
monthly log change

+1.10%

Blue states · mean
monthly log change

Electrified share by state political lean



Western states lead adoption, interior states lag

Western states and Washington, D.C. lead in vehicle electrification, with interior states lagging. In July 2026, electric-or-hybrid share of new registrations in California was 44.5%, twice the national average and more than 3 times the share in the 5 least-electrified states.

44.5%

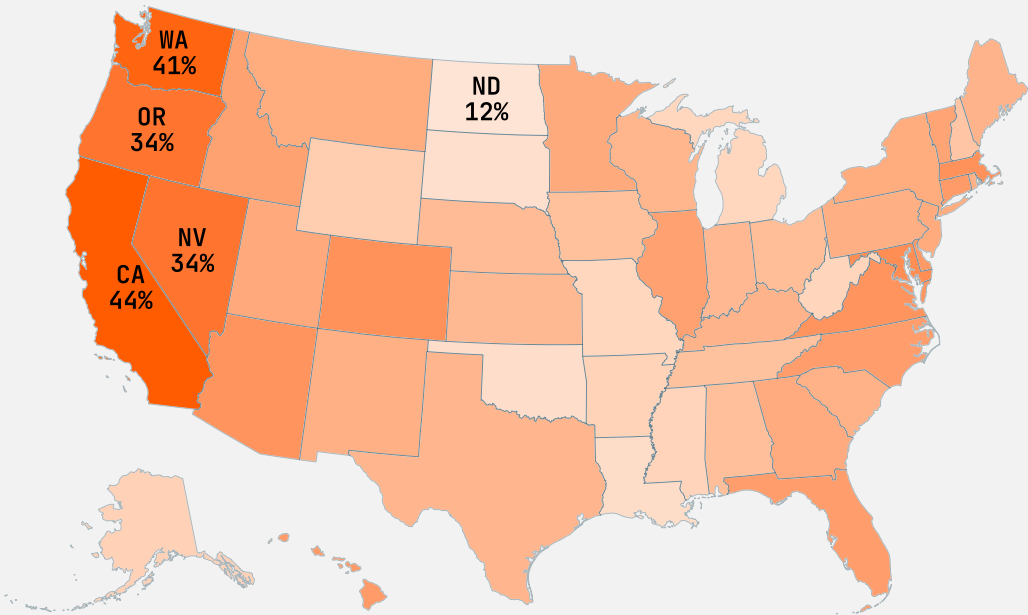
California, highest share

22.0%

National average

11.9%

North Dakota, lowest share



Highest share			Lowest share		
01	California	44.5%	01	North Dakota	11.9%
02	Washington	41.1%	02	South Dakota	12.7%
03	District of Columbia	39.9%	03	Oklahoma	13.1%
04	Oregon	34.2%	04	Louisiana	13.2%
05	Nevada	34.0%	05	Missouri	14.2%

Year over year • Jul 2025 → Jul 2026

EV share-gainers lean red, decliners lean blue

Change in electric-or-hybrid share of new registrations, July 2026 vs. July 2025. Gains cluster in the interior and the South, particularly in red states. The five declines are in blue or purple states: the four blue states are already above the national average, with Michigan the outlier.

+6.8

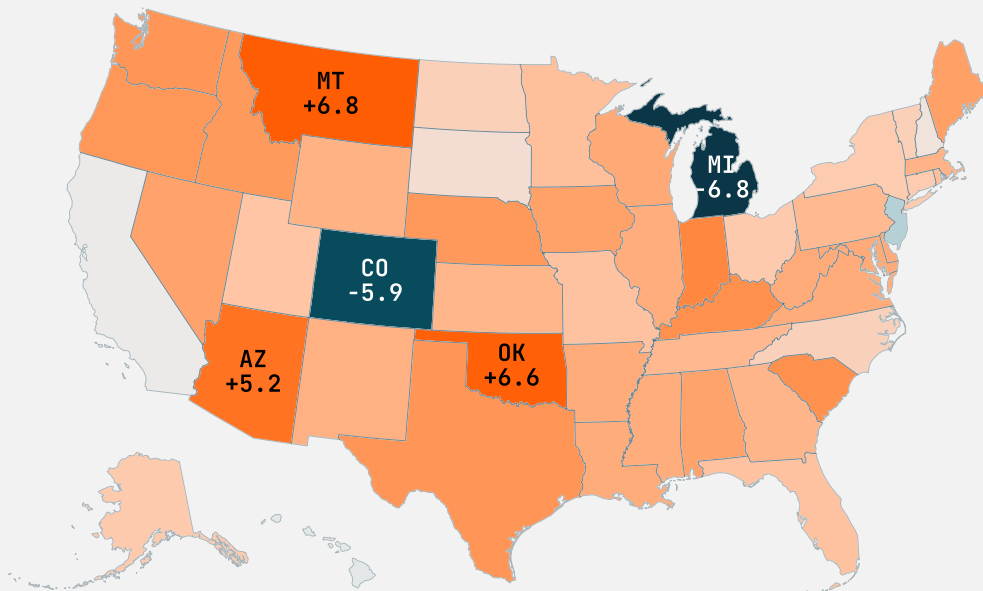
Montana, largest gain
(pp)

46 / 51

Of the 50 states and
D.C., gaining share

-6.8

Michigan, largest decline
(pp)



Largest gains

01	Montana	+6.8 pp
02	Oklahoma	+6.6 pp
03	Arizona	+5.2 pp
04	Indiana	+4.3 pp
05	Kentucky	+4.0 pp

Largest declines

01	Michigan	-6.8 pp
02	Colorado	-5.9 pp
03	District of Columbia	-1.1 pp
04	New Jersey	-0.6 pp
05	Hawaii	-0.1 pp

Year over year · Jul 2025 → Jul 2026

Longer-term shifts led by red, low-baseline states

Grouping states by political lean sorts the data cleanly, but change is highest among states with a lower baseline, not just those leaning more red.

Red states

+2.9

24 of 24 states gained
16.2% → 19.1%

Purple states

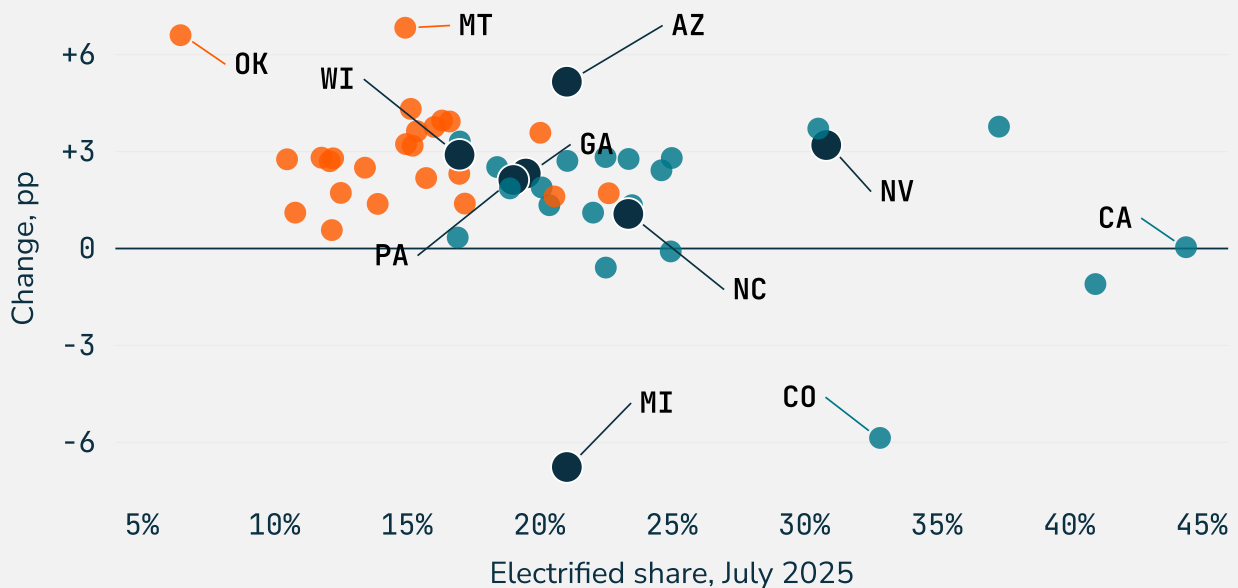
-0.2

6 of 7 states gained
20.7% → 20.4%

Blue states

+1.0

16 of 20 states gained
29.8% → 30.8%



● Red states ● Purple states ● Blue states

+0.34

Shift vs. red vote share (r)

-0.36

Shift vs. 2025 electrified
baseline (r)

+0.11

Vs. vote share, holding
baseline constant

After controlling for baseline the political signal collapses to +0.11, showing the starting point explains most of the shift. Red states are catching up to the rest of the country.

Since February · Dec-Feb → May-Jul 2026

After gas prices rise, EV gains skew to blue states

Since gas prices rose in February, 48 of the 50 states have gained share, with stronger correlation against vote share. Western and blue states are gaining the most share, inverting the pattern from summer 2025.

Red states

+4.2

14.9% → 19.1%

Purple states

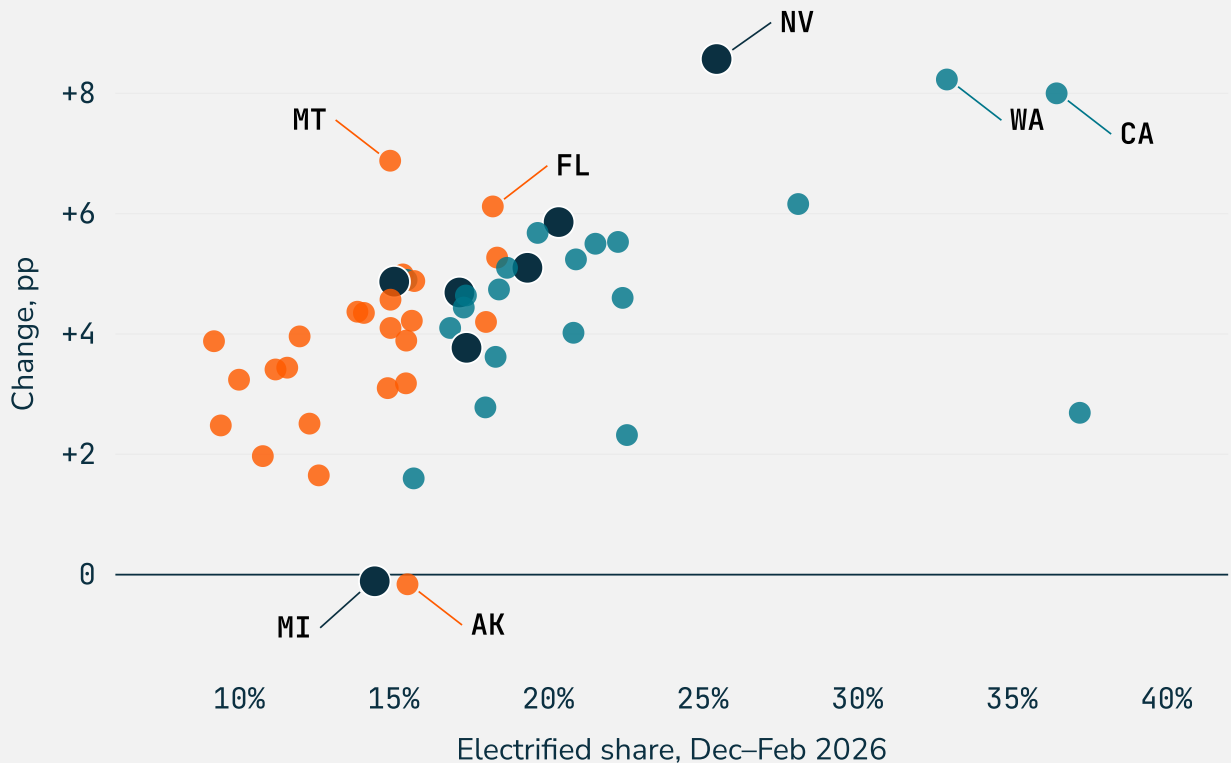
+3.0

17.5% → 20.4%

Blue states

+5.1

25.7% → 30.8%



● Red states ● Purple states ● Blue states

-0.18

Change vs. red vote share
(r)

+0.51

Change vs. Dec-Feb
baseline (r)

+0.40

Vs. vote share, holding
baseline constant

Since February · Dec-Feb → May-Jul 2026

Growth tracks penetration baseline, not size of price shock

Every state saw similar shocks in gasoline price per gallon, but the states with the largest increases still hovered around the national average in hybrid/electric vehicle growth.

Illinois had the largest price increase (+\$1.94) and a middling shift (+5.10 pp). Georgia had the smallest (+\$1.26) and an above-average shift (+4.68 pp). Wyoming rose well above average (+\$1.71) yet shifted least of these (+3.96 pp), while Nevada and Washington top the electrification table on middling price moves.

