

# Inside Climate News

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## **The First Casualty of Trump’s Climate Action Repeal: The U.S. EV Transition**

Tailpipe standards meant to hasten adoption of electric vehicles were slashed alongside the scientific basis for regulating greenhouse gas emissions. That will come at a cost.

By Marianne Lavelle, Dan Gearino  
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With the repeal of the Environmental Protection Agency’s scientific finding on the dangers of greenhouse gases, the Trump administration is aiming to take out many federal actions on climate change in one blast.

The first impact of this deregulatory detonation will be on cars. The EPA packaged its withdrawal of the 17-year-old endangerment finding with elimination of the ambitious tailpipe pollution standards adopted by the Biden administration. It’s a move designed to alter the choices consumers are likely to see in showrooms, the kinds of vehicles rolling off assembly lines and the technology evolution unfolding in U.S. manufacturing.

In fact, the change is already underway. Ford announced in December it would stop making its F-150 Lightning pickup truck and would otherwise scale back its electric vehicle plans. General Motors ended plans to build EVs at its Orion plant in Michigan, shifting the facility to production of big gas-powered models like the

luxury Cadillac Escalade SUV and the Chevrolet Silverado pickup truck. Stellantis has cancelled plans for a fully electric Ram 1500 truck and has scrapped several plug-in hybrids, including the Chrysler Pacifica and Jeep Grand Cherokee 4xe.

There's little doubt that the auto industry is pivoting—for the time being, anyway—to a future of higher emissions in the United States. EPA's rescission of tailpipe pollution standards wipes out what the Biden administration had calculated would be a 7.2 billion-metric-ton cut in greenhouse gas emissions, the largest single step that any nation has taken on climate change.

But there are sharply different views on what this decision means for American consumers and carmakers. President Donald Trump and his top officials on Thursday touted a cascade of benefits they see rippling throughout the economy, starting with more affordable vehicles.

“You're going to get a better car, a car that starts easier, a car that works better, for a lot less money,” said Trump from a podium in the White House's Roosevelt Room, as he unveiled what he described as the biggest deregulatory action in history.

Critics of the move argue, however, that U.S. car buyers will be left with fewer choices as the pressure for automakers to expand their EV offerings ends. They contend that U.S. automakers will be hurt in the long run as they fall further behind China in a global market that remains committed to a transition to EVs.

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EV Sales Slip Domestically, Sail Globally

The United States already is on a different trajectory than the rest of the world when it comes to EVs. In 2025, EV sales fell 4 percent in the United States while growing 33 percent in Europe and 20 percent worldwide, according to the United Kingdom-based research firm Rho Motion.

EPA Administrator Lee Zeldin, appearing alongside Trump at the White House, said the Biden rules were forcing automakers to build vehicles that U.S. consumers did not want. “No longer will automakers be pressured to shift their fleets toward electric vehicles, vehicles that are still sitting unsold on dealer lots all across America,” Zeldin said.

But EV sales in the United States had five consecutive years of growth before last year’s fall-off, which was at least partly due to the Trump administration rolling back federal support for EVs—most importantly, Congress’ repeal of the \$7,500 federal consumer tax credit in the One Big Beautiful Bill Act. After the tax credit expired last Sept. 30, EV sales in the United States plummeted.

In recent weeks, Ford, GM and Stellantis wrote off a collective \$52.1 billion in investments they had made in electric vehicles. Those losses exceed the \$34.1 billion in total profits for the “Big Three” in 2024.

Trump argues the lifting of regulations will accelerate a revival of the industry that is already underway. He talked about his January visit to Ford’s Dearborn Truck Plant in Michigan, when executive chairman Bill Ford Jr. said the plant was expanding to 24-hour shifts, six days a week to build its iconic F-150 pickup truck.

“Perhaps no industry has benefited more from our historic deregulation campaign than the U.S. auto industry,” Trump said on Thursday.

After the president announced the endangerment finding repeal, John Bozzella, president and CEO of the auto industry’s main trade group, the Alliance for Automotive Innovation, put out a supportive statement, saying the action will “correct some of the unachievable emissions regulations enacted under the previous administration.” Although Bozzella had appeared alongside Biden administration officials and a phalanx of EVs at the rollout of the regulations in 2024, he has been urging the Trump administration to ease the rules.

“I’ve said it before: Automotive emissions regulations finalized in the previous administration are extremely challenging for automakers to achieve given the current marketplace demand for EVs,” Bozzella said. “The auto industry in America remains focused on preserving vehicle choice for consumers, keeping the

industry competitive, and staying on a long-term path of emissions reductions and cleaner vehicles.”

But in its comments to the EPA last fall on the repeal proposal, the auto industry alliance raised concerns that the Trump administration’s total repeal approach “has the potential to further amplify the severity of policy swings in future administrations.”

Joshua Linn, an economics professor at the University of Maryland and a senior fellow at Resources for the Future, a think tank that studies energy and the environment, said the auto industry wants “a consistent set of standards over time, because that’s going to make planning much easier.”

Linn said that the Biden administration’s tailpipe standards, which targeted a 50 percent cut in greenhouse gas emissions from 2026 levels by 2032, likely would have been difficult for automakers to meet, especially in the later years, when deeper greenhouse gas emissions cuts were being required. The Trump administration could have addressed those concerns by easing the rules, but this action is much more extreme, Linn said, and it goes beyond what would be best both for automakers and consumers.

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