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RELATED SBD REPORTS



623 – Electric Vehicle Guide

SBD's EV Guide provides insight into the current situation for mass-produced passenger and light commercial EVs, their features, charging infrastructure, as well as environmental impact and policy considerations.



Electric Vehicle

#217

EV Charging & Infrastructure Guide

Following a series of commitments from OEMs to phase out their ICE vehicles in favor of electric vehicles, and with governments providing a variety of incentives for EV buyers, adoption rates and sales are growing rapidly. With more consumers, fleets, and service operators switching to EVs, there comes a renewed interest in the build-up of EV charging networks.

However, as the ecosystem for EV charging infrastructure evolves, it also becomes more complex. Likewise, for OEMs and operators, optimizing the charging network as it evolves at such a rapid pace is an increasingly complicated challenge. This complexity only develops further when accounting for the variety of charge point operators involved in EV charging and the growing partnership network that surrounds them. With this complexity and variety present at such an early stage, tracking the ecosystem for EV charging can quickly become difficult.

This report maps out the current landscape of EV charging infrastructure to track its footprint and highlight its growth. Taking a deep dive into the ecosystem, the report profiles its key players, identifies their strengths and weaknesses, and understands the business models adopted by them. It similarly works to understand the levels, complexity, and maturity of EV charging infrastructure across Europe and the U.S.

COVERAGE



GLOBAL



NA



CHINA



EUROPE

FREQUENCY



ANNUALLY



Bi-Annually



ONE-OFF

PUBLICATION FORMAT



PDF



POWERPOINT



EXCEL



ONLINE

PAGES



120+

Request price



Key features & benefits

- > **Defines the Need:** Analyze where the charging infrastructure demand is the highest to help you pinpoint the right location for your project.
- > **Data Driven Insights:** Choose from dozens of metrics across 1200+ regions in Europe to truly understand the local market.
- > **Fresh, quality-assured data:** Charging station data is updated at least quarterly with manual and automatic quality assurance to guarantee accuracy.
- > **Street-level detail:** Pan and zoom to find the exact location that interests you. Locate charging deserts so you can install an oasis!

This research supports



GOVERNMENTS



CHARGE POINT
OPERATORS



INVESTORS

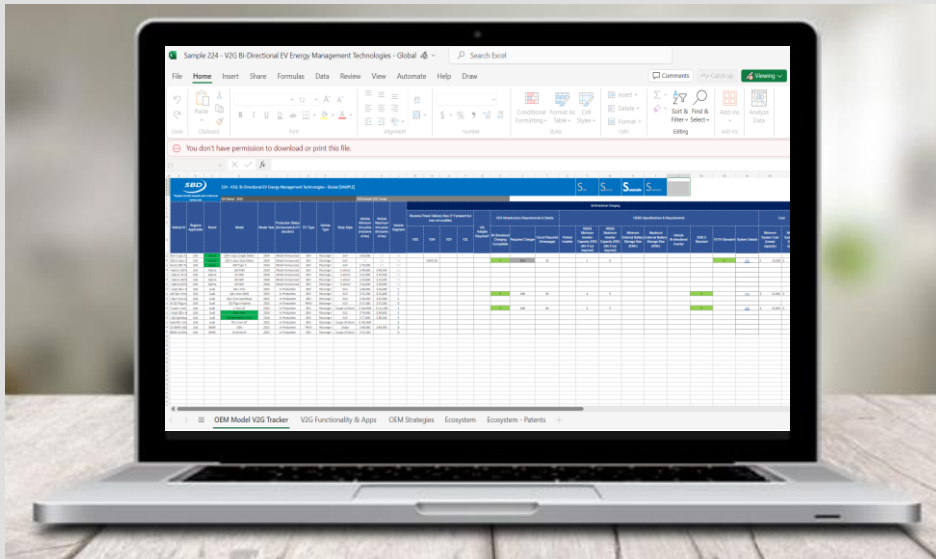


AUTOMOTIVE SERVICE
AND PRODUCT PLANNERS

How do I access?



Simple web-based access with
multiple user accounts



View Excel Data Sheet Sample

EV Charging & Infrastructure Guide

For an in-depth statistical and demographic data by geography, charging types, network size

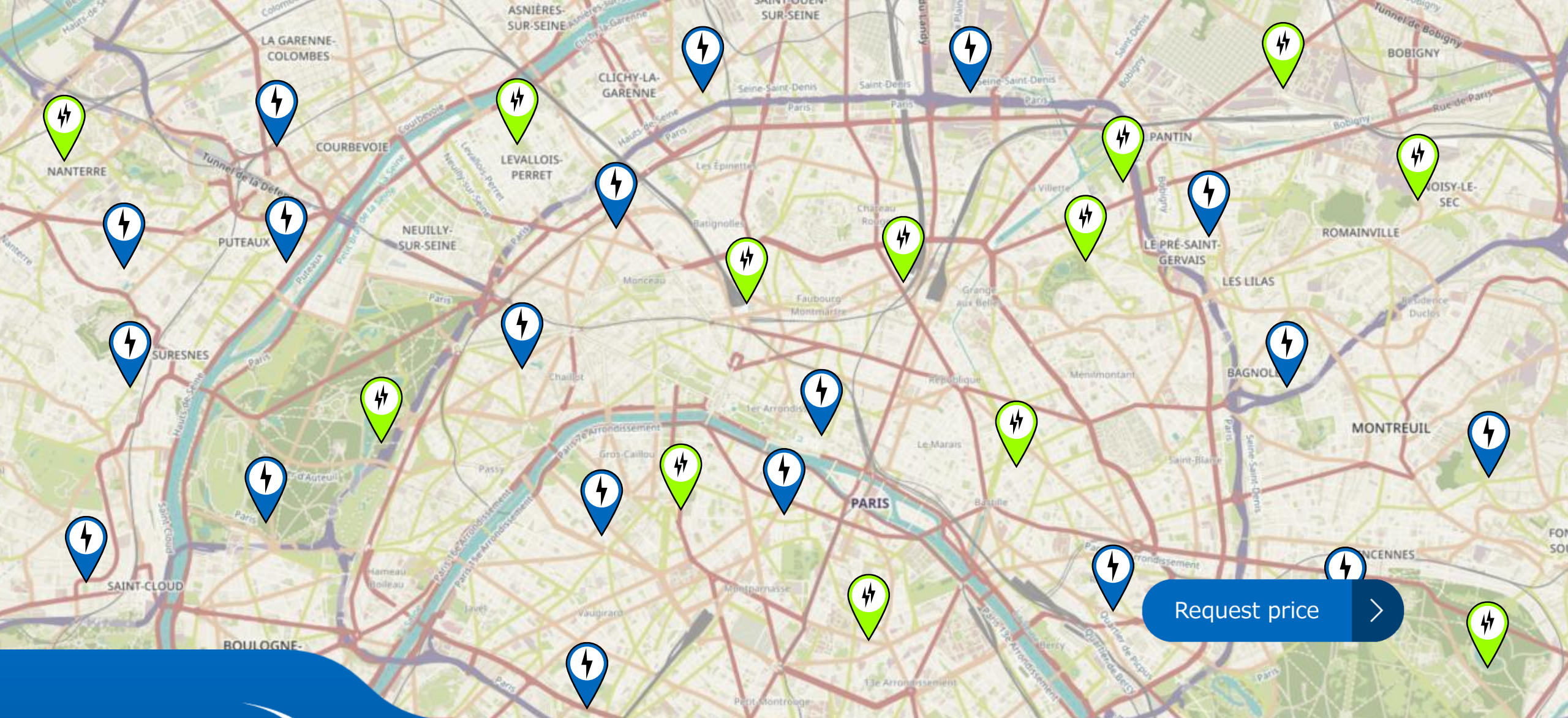
>36,000
datapoints

93+ CPOs, 52
Regions

Dashboards,
Ranking, Ecosystem,
and more

Click for Sample





EV Charging & Infrastructure Guide

Charge point operators, station distribution, and trend analysis

217 – EV Charging and Infrastructure Guide - Europe

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Introduction

Key questions answered in this report and chapter overviews



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Introduction

The ecosystem for EV charging infrastructure evolves, and it also becomes more complex. Likewise, for Automakers and operators, optimizing the charging network as it evolves at such a rapid pace is an increasingly complicated challenge. This complexity only develops further when accounting for the variety of charge point operators involved in EV charging and the growing partnership network that surrounds them. With this complexity and variety present at such an early stage, tracking the ecosystem for EV charging can quickly become difficult.

This report maps out the current landscape of EV charging infrastructure to track its footprint and highlight its growth. Taking a deep dive into the ecosystem, the report profiles its key players, identifies their strengths and weaknesses, and understands the business models adopted by them. It similarly works to understand the levels, complexity, and maturity of EV charging infrastructure across Europe and the U.S and the Rest of the world (RoW). **SBD's 217 – EV Charging & Infrastructure Guide** provides data-driven insights into the CPOs and countries/regions/states. The report looks at **FOUR key benefits of EV charging infrastructure for automakers**:



Brand loyalty



Competitive



**Revenue
diversification**



**Regulatory
compliance**

What are the key questions answered in this chapter?

- How many charging points are there and what is their geographic distribution across the EU and US?
- What are the different business models that are being adopted by charging networks?
- Which OEMs are investing in proprietary charging networks, where and how?
- Which charging providers have the largest networks and how efficiently distributed are they?

Source Note: This report has data-driven insights about EV charging infrastructure by network size and capability. The back-end data for the same has been sourced from [eco-mo>ement](#). Sales volumes for EVs are sourced from [EV Volumes](#).

| Section | Content |
|---|--|
| Bird's Eye View of Electrification | An overview of the key findings from SBD's view of what's important in EV industry |
| Executive Summary | A high-level summary of the EV charging infrastructure industry trends across the regions - US, EU and RoW (Argentina, Australia, Brazil, Canada, Mexico, Taiwan and Thailand) |
| CPO & Geography Ranking | Ranking of the CPOs and Regions with their criteria considered in terms of AC and DC charging along with the coverage across the regions. |
| What's New? | Section focusing on new models launched, notable announcements, partnerships and acquisitions, and trends in the EV industry. |
| Analysis | Introduction to how charging infrastructure is evolving rapidly with different pillars supporting its growth. Also, how the charging infrastructure is spread across the region. |
| Summary Tables | The CPO summary section provides the CPO distribution of power and points in the region. The Regional Summary section briefs about the charging infrastructure in each country/state/region. |
| Ecosystem | Understanding the other player (than CPO and automakers) and their contribution to the EV charging infrastructure |
| Future Outlook | Four OEM personas are considered against drivers and barriers into the future to understand when EV charging infrastructure benefits will be truly realized |
| Next Steps | Can SBD help you with any unanswered questions? |

We Listened and Invested In Our Report to Align to Your Goals



You Said...

"I sometimes struggle to relate conclusions from research reports to the Outcomes and KPIs that we are working towards..."

"I would like to see what has recently changed within a forecast or domain to help decide if any changes to strategy need to be made..."

"I want to know where we stand 'head-to-head' against the competition on major industry trends..."

"I can find it difficult to take actionable next steps on Guides without assessing the future direction of the industry..."

"It would be helpful to identify disruptive companies and start-ups to keep an eye for partnerships in the future..."

"I would like the topics to be more 'forward looking' to help with future planning and take advantage of enabling technologies."



We Did...

Added **BIRDS-EYE VIEW** chapter with a high-level overview of all our electrification reports.

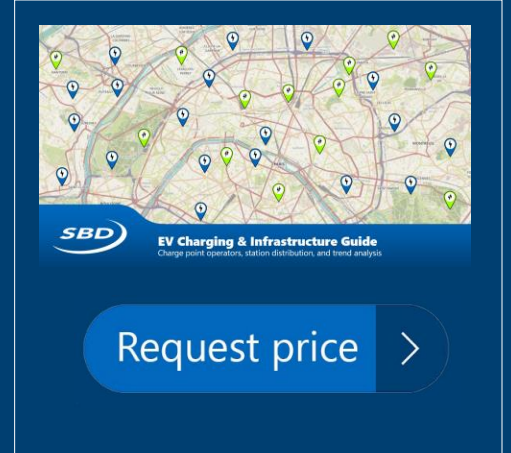
Enhanced **CROSS-REFERENCING** with insights from our EV Incentives and legislation and EV Guide

Introduced **FUTURE OUTLOOK** chapter with motivations such as brand loyalty, and its drivers and barriers over time.

More **DATA-DRIVEN ANALYSIS** through our Summary Table, Analysis, and Executive Summary.

Created a SBD **CPO & GEOGRAPHY RANKING** and an **ECOSYSTEM** chapter with offering and partnerships insights for key non-OEM stakeholders.

Example slides from the report





EV Charging is just a part of delivering the motivations of Electrification

This Bird's Eye View chapter gives SBD's view of the major electrification trends from our relevant reports ...

...in the journey to delivering the nine key OEM Electrification motivations





EU & USA markets shifting to 800V vehicle architectures



BYD plans to introduce 800V architecture vehicles to the EU market at significantly lower costs

May 2024:

BYD releases its new vehicle platform the e-platform 3.0 Evo ([Link*](#))



Ford has patented a Multi-Voltage Electrical Architecture for its next-generation electric vehicles

Mar 2024:

Ford Mach-e has 400V architecture ([Link*](#))



Hyundai Motor Group has integrated 800V technology across all its Automakers

Mar 2024:

Available in Hyundai E-GMP platform based EVs, Latest being IONIQ 6 ([Link*](#))



By 2026, VW will launch the Scalable Systems Platform supporting a diverse range of vehicles from entry-level Volkswagens to premium Porsche models

May 2024:

Porsche and Audi offers on selected models ([Link1](#), [Link 2](#))



Tesla's new Cybertruck features 800V architecture, a technology that will play a key role in its future EV lineup

Mar 2024:

Available in Tesla Cybertruck ([Link*](#))



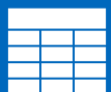
General Motors is the leader of 800V charging architectures among American automakers

May 2024:

Available in GMC Hummer EV Pickup, Hummer EV SUV, Sierra and Chevrolet Silverado EV ([Link1*](#), [Link 2](#))



SBD Geography Ranking of Generation and Performance Score



SBD Geography Rankings help in turning data into actionable advice

SBD Ranking helps readers day-in, day-out with –

- Support in planning activities via an expert view for the region-wise EV charging infrastructure coverage while progressing through generations
- The ranking system could also be used by CPOs themselves to compare their capabilities against competitors
- Support in infrastructure positioning analysis for regions by providing quantified matrices and data for best-in-class, leading, standard and sub-standard.

1

Primary position of Geography based upon Generation

The lower value between AC and DC is used as the final generation for each country or state, and those that do not meet the Vehicle 1.0 Generation criteria are excluded from the ranking list.

Gen 3.0 Criteria

| | Avg AC power (Power per point) (\geq) kW | Charge points/1000 BEVs (\geq) | Charge points/1000km road length (\geq) |
|----|---|------------------------------------|---|
| AC | 17.50 | 130 | 8 |
| OR | | | |
| DC | 188 | 20 | 2 |

Gen 2.0 Criteria

| | Avg AC power (Power per point) (\geq) kW | Charge points/1000 BEVs (\geq) | Charge points/1000km road length (\geq) |
|----|---|------------------------------------|---|
| AC | 8 | 70 | 2 |
| OR | | | |
| DC | 145 | 10 | 1 |

2

Relative position within a Generation is set by performance

The relative position of a region within those of the same generation is set by their SBD Score. This is made up of a combination of many Delight of Performance criteria in the report.

Scoring



- More than 10 : Total kW per road length (km)
- More than 2k : BEV fleet per 100k people
- More than 10 : Total kW per BEV
- More than 100 : Level 2 - Ultra-fast DC charge point ($P \geq 350kW$)



- 5 - 10 : Total kW per road length (km)
- 1k - 2k : BEV fleet per 100k people
- 5 - 10 : Total kW per BEV
- 50 - 100 : Level 2 - Ultra-fast DC charge point ($P \geq 350kW$)



- Less than 5 : Total kW per road length (km)
- Less than 1k : BEV fleet per 100k people
- Less than 5 : Total kW per BEV
- Less than 50 : Level 2 - Ultra-fast DC charge point ($P \geq 350kW$)

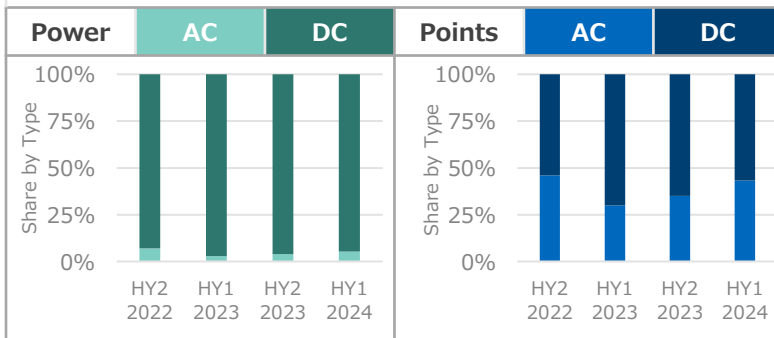
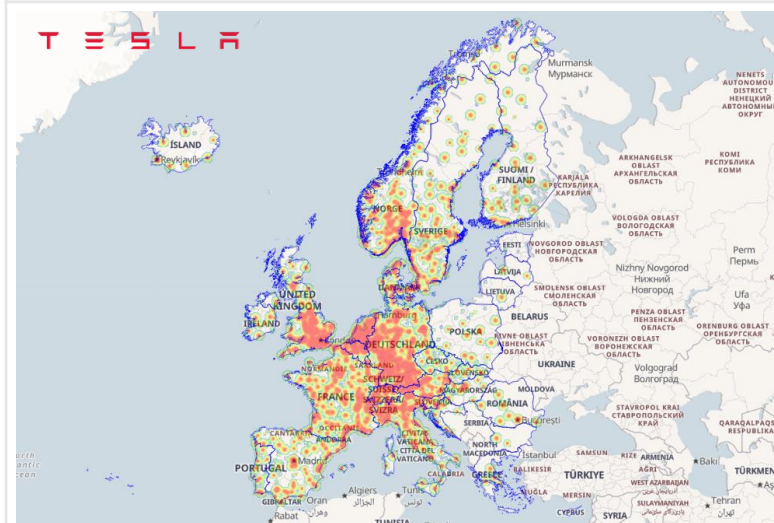
It is perfectly possible for a higher Generation region to have a lower score than those at the top of the earlier Generation.



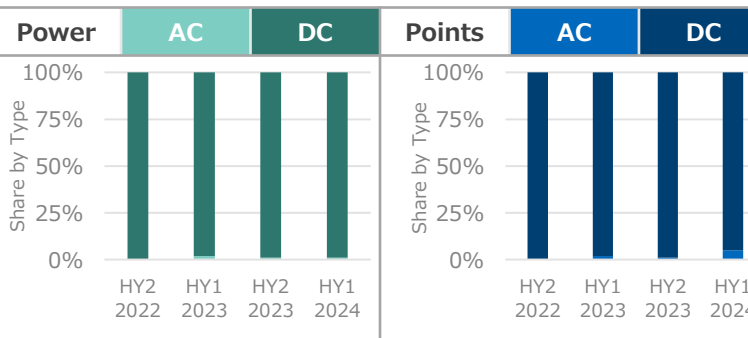
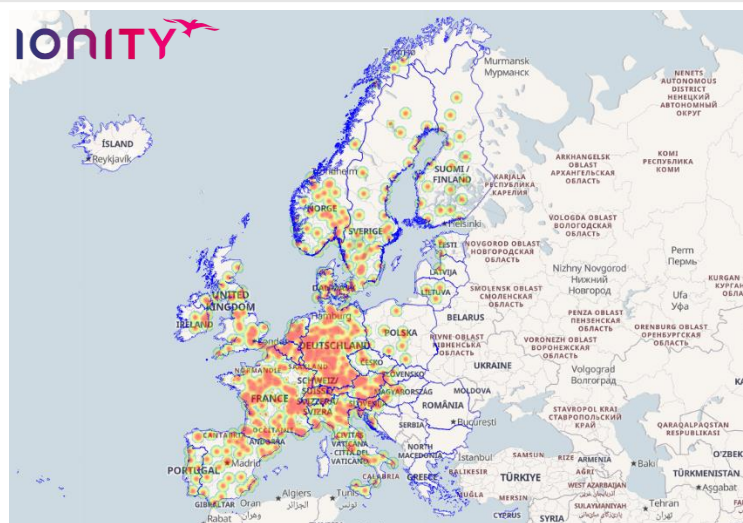
Charging network with a strong foothold in Europe

The EV Charging Infrastructure is proliferating by adding new charging points either by expanding across the region or by taking over the smaller operators. The slide highlights the **Top 3 operators of the region by power** and shows the growth of the power and points from last 2 years. Also, the Heat map of the respective operator is being shown for an overview of the presence across Europe.

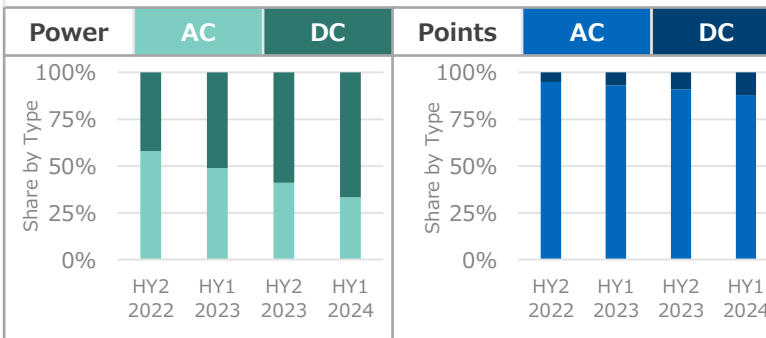
Tesla is leading the share of the power and points in the region by **10% and 3%, respectively**. Also, its supercharger network has been **open to non-Tesla EVs**, making EV ownership more convenient and decreasing consumers' range anxiety.



Ionity is spread across **24 countries** in Europe and has the most DC charge points (in comparison to AC) as can be seen in the column charts below. Also, **eleven automakers** have partnered with the charging operator for the benefit of EV consumers.



Allego is an operator that has a slightly different approach as could be seen with the **high number of AC points** and contributing to nearly 50% of the power across the region. In addition, the operator offers comparatively **less pricing for its AC points** than DC.



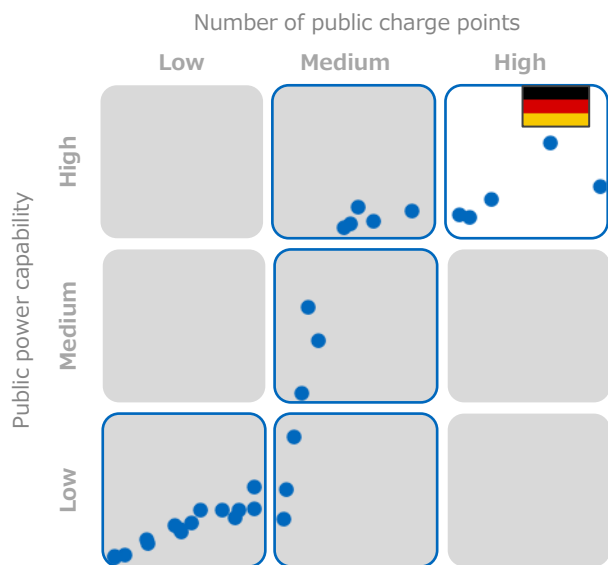


Block 1 – High Power capability - High number of charge points

Regional Charging Infrastructure Blocks

Summary

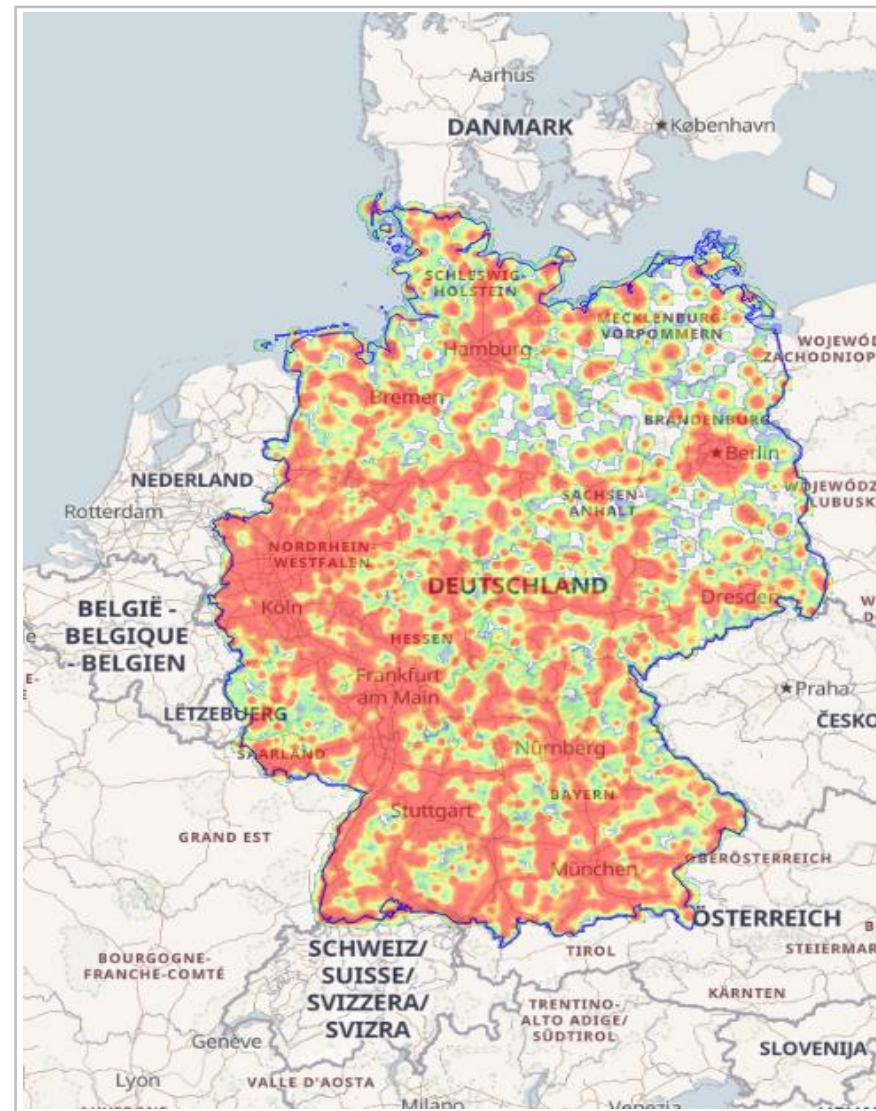
EU Countries Index



Key Highlights

- Germany has the largest electric vehicle fleet overall (including BEVs and PHEVs, steadily growing over the past few years (2020-2024 YTD). This also translates into a widely spread opportunity for EV charging infrastructure.
- Germany has the second highest number of charging points (after Netherlands). However, it leads in terms of power capability owing to a higher number of DC charging points (>5X of Netherlands)
- The number of AC chargers are nearly four times DC and more than 90% of the DC chargers are either fast or ultra-fast, with the latter dominating the DC market.

| Germany | |
|--|--|
| 136,765 | Total number of public charge points |
| AC : 2,118,991 kW | Total public power capability 7,206,144 kW |
| DC : 5,087,153 kW | |
| COMPLEO | Largest CPO operating: Compleo |
| 106,900 | Total Number of AC charging points |
| AC Charge Point | 2% 18% 78% 2% |
| 21,568 | Total Number of DC charging points |
| DC Charge Point | 6% 7% 58% 29% |
| 29,865 | BEVs in fleet (2023) |
| BEV & PHEV registrations growth YOY (2020-2024) | 191k 200k 351k 322k 483k 360k 545k 174k 29k 54k 2020 2021 2022 2023 2024 — BEV — PHEV (Till April) |

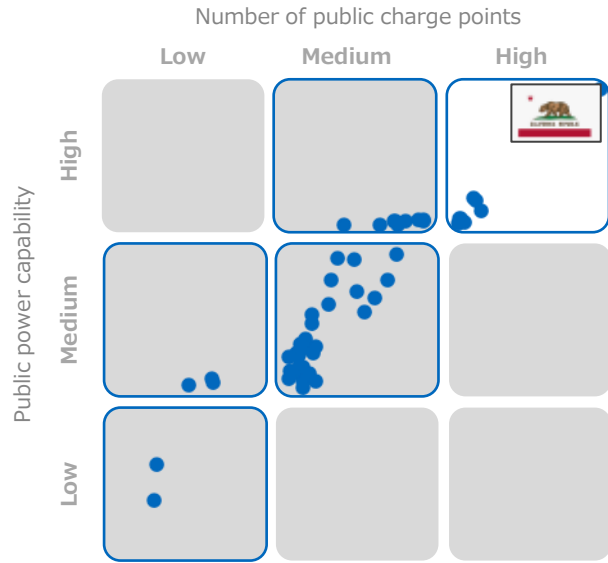


Source: SBD's EV CAP Platform supported by data from Eco-Movement



Block 1 – High Power capability - High number of charge points

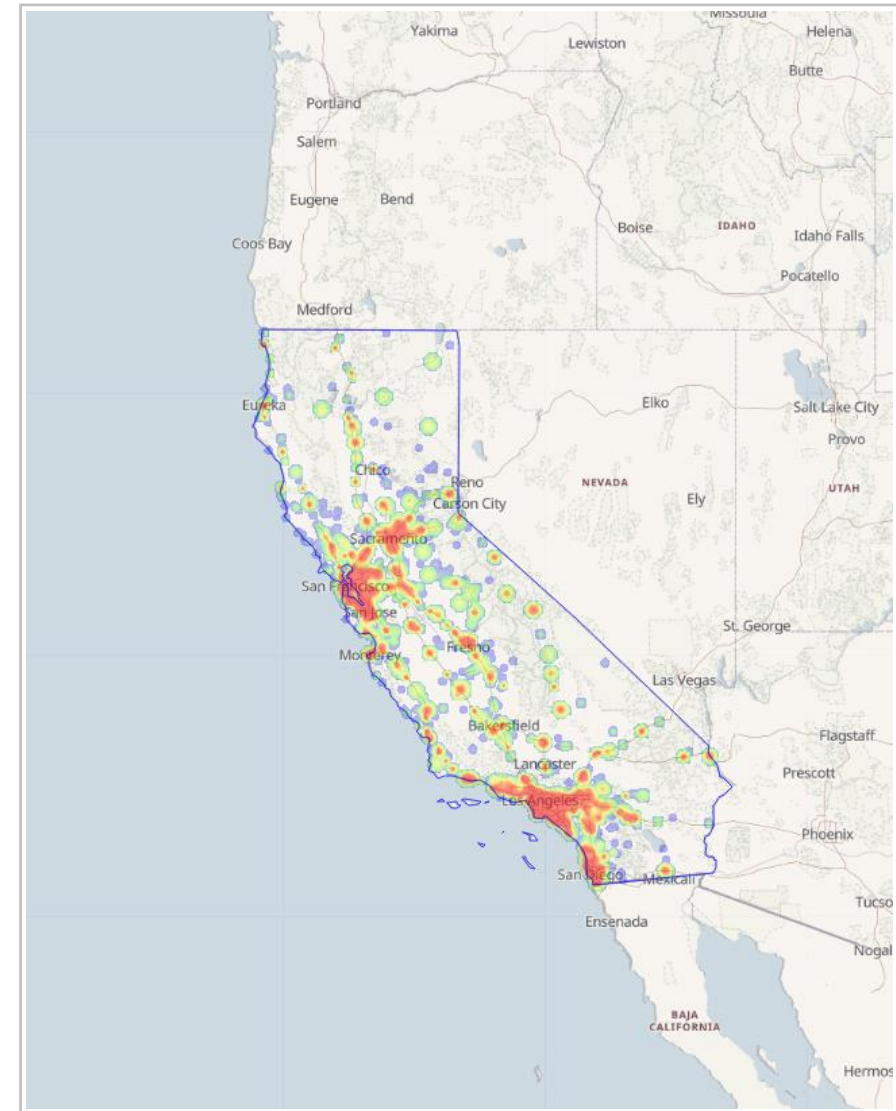
Regional Charging Infrastructure Blocks



Summary

US States Index

| California | |
|--|---|
| 52,814 | Total number of public charge points |
| AC : 304,069 kW | Total public power capability 2,381,130 kW |
| DC : 2,077,061 kW | |
| | Largest CPO operating: ChargePoint |
| 41,391 | Total Number of AC charging points |
| AC Charge Point | <p>0.1% 0.04% 15.0% 84.8%</p> <p>■ Slow ■ Level 1 - Medium ■ Level 2 - Medium ■ Fast</p> |
| 11,423 | Total Number of DC charging points |
| DC Charge Point | <p>8% 1% 29% 62%</p> <p>■ Slow ■ Fast ■ Level 1 - Ultra-fast ■ Level 2 - Ultra-fast</p> |
| 903,620 | BEVs in fleet (2022) |
| BEV & PHEV registrations growth YOY (2019–2023) | <p>101k 93k 167k 268k 379k</p> <p>44k 28k 53k 44k 59k</p> <p>2019 2020 2021 2022 2023</p> <p>— BEV — PHEV</p> |



Source: SBD's EV CAP Platform supported by data from Eco-Movement

Key Highlights

- California has the most developed EV market in the US and the only one with more than 50K charging points. The power capability in **California increased by more than 20%.**
- The AC charging network consists of ~85% slow chargers** while the rest is mostly medium and just 18 Fast AC charge points. DC network has a decent mix of Level 1 ultra-fast and fast chargers.
- California reported growth in BEV registrations despite a high base while the **PHEV numbers have seen a relatively slower growth since 2020.**

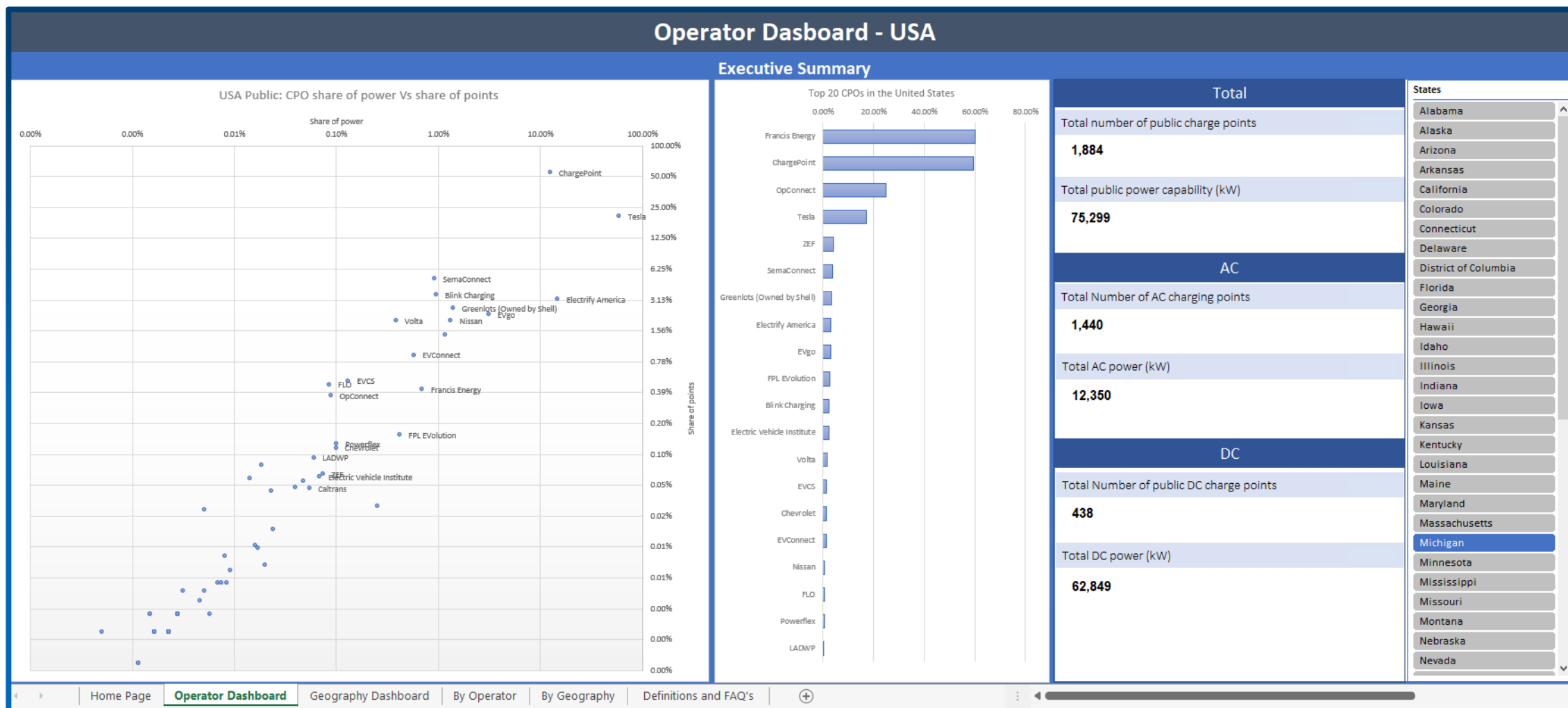
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Excel Database Includes



European Countries Covered:
30+

US States Covered:
50

Excel Tabs:
6



Excel Database Includes

#217/EV Charging and Infrastructure Guide



| <div>SBD</div> | 217 - EV Charging Infrastructure Guide | | | | | | | | | | | | | | | | | | | | | |
|---|--|---|-----------------------------------|--|---|---|--|-----------------------|---|--|-----------------------|----------------------------|---------------------------|-------------------------------|------------------------------|-------------------------------|------------------------------|------------------------------------|-------------------------------------|---|------------------------------------|---------------------------------------|
| | 217USA-22-HY1 | | | | | | | | | | | Deep Dive - By Operator | | | | | | | | | | |
| | Basics | | | Network Size | | | | | | | | Relevance | | | | | | | | | | |
| Operator Name | Selected for Deeper Dive | Website | Corporate or Government Ownership | Total number of public charge points in region | Total public power capability in the region | Number of public AC charge points in region | Public AC power capability in the region | Max AC Power Offering | Number of public DC charge points in region | Public DC power capability in the region | Max DC power offering | Regional percent of points | Regional percent of power | Regional percent of AC points | Regional percent of AC power | Regional percent of DC points | Regional percent of DC power | Largest market in region by points | Percent of points in largest market | Largest market in region by total power | Percent of power in largest market | Largest market in region by AC points |
| [Name] | [Y/N] | [URL] | (Corporate / Gov't) | [#] | (kW) | [#] | (kW) | (kW) | [#] | (kW) | (kW) | % | % | % | % | % | % | [State] | % | [State] | % | [State] |
| Tesla | Y | Charging Tesla | Corporate | 22402 | 2604750 | 8850 | 117308 | 48 | 13126 | 2391663 | 250 | 20.15% | 60.08% | 10.56% | 16.90% | 58.95% | 68.36% | California | 17.03% | California | 60.43% | California |
| Electrify America | Y | Electrify America | Corporate | 3487 | 647017 | 174 | 1027 | 7 | 3313 | 645990 | 350 | 3.14% | 14.92% | 0.21% | 0.15% | 14.88% | 18.46% | California | 3.19% | California | 13.88% | California |
| ChargePoint | Y | EVSE Electrify America | Corporate | 60393 | 545469 | 54585 | 361277 | 65 | 1856 | 148412 | 350 | 54.33% | 12.58% | 65.13% | 52.06% | 8.33% | 4.24% | California | 59.37% | California | 14.30% | California |
| EVgo | Y | EVgo Electrify America | Corporate | 2502 | 136418 | 911 | 6540 | 7 | 1520 | 126150 | 350 | 2.25% | 3.15% | 1.09% | 0.94% | 6.83% | 3.61% | California | 3.18% | California | 4.99% | California |
| Greenlots (Owned by Shell) | Y | EV Charging Greenlots | Corporate | 2872 | 61157 | 2329 | 16586 | 29 | 540 | 44271 | 460 | 2.58% | 1.41% | 2.78% | 2.39% | 2.43% | 1.27% | California | 3.22% | New York | 6.20% | California |
| Nissan | Y | Nissan USA Nissan | Corporate | 2152 | 58113 | 1604 | 34632 | 22 | 547 | 23431 | 50 | 1.94% | 1.34% | 1.91% | 4.99% | 2.46% | 0.67% | California | 0.70% | California | 0.55% | California |
| Blink Charging | Y | Blink Charging | Corporate | 3877 | 41774 | 3380 | 33043 | 115 | 74 | 3847 | 60 | 3.49% | 0.96% | 4.03% | 4.76% | 0.33% | 0.11% | California | 2.44% | California | 0.56% | California |
| SemaConnect | Y | Buy EV charging | Corporate | 5547 | 39938 | 5547 | 39938 | 7 | - | - | - | 4.99% | 0.92% | 6.62% | 5.75% | 0.00% | 0.00% | California | 3.65% | California | 0.72% | California |
| Francis Energy | Y | Fast Charging Francis Energy | Corporate | 460 | 30399 | 230 | 1649 | 7 | 230 | 28750 | 200 | 0.41% | 0.70% | 0.27% | 0.24% | 1.03% | 0.82% | Oklahoma | 60.03% | Oklahoma | 63.96% | Oklahoma |
| EVConnect | Y | EV Connect | Corporate | 1001 | 25129 | 854 | 17836 | 29 | 147 | 7293 | 50 | 0.90% | 0.58% | 1.02% | 2.57% | 0.66% | 0.21% | California | 1.14% | California | 0.78% | California |
| FPL EVolution | Y | FPL FPL EVolution | Corporate | 167 | 18319 | 92 | 656 | 7 | 63 | 17586 | 375 | 0.15% | 0.42% | 0.11% | 0.09% | 0.28% | 0.50% | Florida | 2.63% | Florida | 6.72% | Florida |
| Volta | Y | Volta Charging | Corporate | 2156 | 16785 | 1952 | 14880 | 33 | 32 | 640 | 20 | 1.94% | 0.39% | 2.33% | 2.14% | 0.14% | 0.02% | California | 1.73% | California | 0.36% | California |
| EVCS | Y | EVCS EVCS | Corporate | 559 | 5737 | 519 | 3737 | 7 | 40 | 2000 | 50 | 0.50% | 0.13% | 0.62% | 0.54% | 0.18% | 0.06% | California | 1.33% | California | 0.40% | California |
| Powerflex | Y | PowerFlex | Corporate | 136 | 4404 | 109 | 2354 | 22 | 27 | 2050 | 150 | 0.12% | 0.10% | 0.13% | 0.34% | 0.12% | 0.06% | California | 0.38% | California | 0.34% | California |
| Chevrolet | Y | Public Charging Chevrolet | Corporate | 125 | 4350 | 65 | 1350 | 23 | 60 | 3000 | 50 | 0.11% | 0.10% | 0.08% | 0.19% | 0.27% | 0.09% | Michigan | 1.24% | Michigan | 1.15% | Michigan |
| OpConnect | Y | OpConnect - Hawaii | Corporate | 400 | 3864 | 379 | 2894 | 88 | 21 | 970 | 50 | 0.36% | 0.09% | 0.45% | 0.42% | 0.09% | 0.03% | Hawaii | 24.81% | Hawaii | 16.97% | Hawaii |
| FLO | Y | Electric vehicle FLO | Corporate | 515 | 3747 | 513 | 3647 | 7 | 2 | 100 | 50 | 0.46% | 0.09% | 0.61% | 0.53% | 0.01% | 0.00% | California | 0.59% | California | 0.11% | California |
| ZEF | Y | ZEF Energy | Corporate | 69 | 3209 | 5 | 108 | 22 | 64 | 3101 | 50 | 0.06% | 0.07% | 0.01% | 0.02% | 0.29% | 0.09% | Minnesota | 4.16% | Minnesota | 5.20% | Minnesota |
| Electric Vehicle Institute | Y | EVI Electric Vehicle Institute | Corporate | 65 | 3009 | 12 | 259 | 22 | 53 | 2750 | 150 | 0.06% | 0.07% | 0.01% | 0.04% | 0.24% | 0.08% | Maryland | 2.18% | Maryland | 2.94% | Maryland |
| LADWP | Y | Public Charging LADWP | Government | 100 | 2628 | 83 | 1778 | 29 | 17 | 850 | 50 | 0.09% | 0.06% | 0.10% | 0.26% | 0.08% | 0.02% | California | 0.29% | California | 0.21% | California |
| Caltrans | Y | California Department of Transportation | Government | 50 | 2386 | 4 | 86 | 22 | 46 | 2300 | 50 | 0.04% | 0.06% | 0.00% | 0.01% | 0.21% | 0.07% | California | 0.15% | California | 0.19% | California |
| [Non-networked] | | | | 1569 | 50783 | 1275 | 27429 | 25 | 286 | 23272 | 350 | 1.41% | 1.17% | 1.52% | 3.95% | 1.28% | 0.67% | California | 0.95% | California | 0.82% | California |
| EVolveNY | | | | 34 | 11106 | - | - | - | 31 | 10056 | 350 | 0.03% | 0.26% | 0.00% | 0.00% | 0.14% | 0.29% | New York | 0.52% | New York | 5.52% | - |
| Webasto | | | | 59 | 2070 | 31 | 670 | 22 | 28 | 1400 | 50 | 0.05% | 0.05% | 0.04% | 0.10% | 0.13% | 0.04% | Oregon | 2.23% | Oregon | 2.12% | Oregon |
| EV Gateway | | | | 51 | 1740 | 30 | 590 | 22 | 21 | 1150 | 150 | 0.05% | 0.04% | 0.04% | 0.09% | 0.09% | 0.03% | California | 0.11% | California | 0.09% | California |
| Hampton Inn | | | | 20 | 1044 | 9 | 194 | 22 | 11 | 850 | 150 | 0.02% | 0.02% | 0.01% | 0.03% | 0.05% | 0.02% | Alabama | 0.77% | Alabama | 1.08% | Alabama |
| Livingston | | | | 47 | 1015 | 47 | 1015 | 22 | - | - | - | 0.04% | 0.02% | 0.06% | 0.15% | 0.00% | 0.00% | New York | 0.72% | New York | 0.50% | New York |
| Shell Recharge | | | | 9 | 878 | - | - | - | 9 | 878 | 175 | 0.01% | 0.02% | 0.00% | 0.00% | 0.04% | 0.03% | California | 0.03% | California | 0.07% | - |
| Sun Country Highway | | | | 85 | 803 | 85 | 803 | 39 | - | - | - | 0.08% | 0.02% | 0.10% | 0.12% | 0.00% | 0.00% | California | 0.06% | California | 0.02% | California |
| Holiday Inn | | | | 13 | 751 | 7 | 151 | 22 | 6 | 600 | 150 | 0.01% | 0.02% | 0.01% | 0.02% | 0.03% | 0.02% | California | 0.01% | Georgia | 0.14% | California |
| 7-Eleven | | | | 14 | 700 | - | - | - | 14 | 700 | 50 | 0.01% | 0.02% | 0.00% | 0.00% | 0.06% | 0.02% | Florida | 0.22% | Florida | 0.26% | - |
| EVgo | | | | 63 | 677 | 53 | 633 | 54 | 14 | 700 | 50 | 0.06% | 0.01% | 0.03% | 0.08% | 0.08% | 0.08% | California | 0.11% | California | 0.03% | California |
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| | Basics | | | Network Size | | | | | | | | Relevance | | | | | | | | | | | |
| Operator Name | Selected for Deeper Dive | Website | Corporate or Government Ownership | Total number of public charge points in region | Total public power capability in the region | Number of public AC charge points in region | Public AC power capability in the region | Max AC Power Offering | Number of public DC charge points in region | Public DC power capability in the region | Max DC power offering | Regional percent of points | Regional percent of power | Regional percent of AC points | Regional percent of AC power | Regional percent of DC points | Regional percent of DC power | Largest market in region by points | Percent of points in largest market | Largest market in region by total power | Percent of power in largest market | Largest market in region by AC points | |
| [Name] | [Y/N] | [URL] | (Corporate / Gov't) | [#] | (kW) | [#] | (kW) | (kW) | [#] | (kW) | (kW) | % | % | % | % | % | % | [State] | % | [State] | % | [State] | |
| Tesla | Y | Charging Tesla | Corporate | 22402 | 2604750 | 8850 | 117308 | 48 | 13126 | 2391663 | 250 | 20.15% | 60.08% | 10.56% | 16.90% | 58.95% | 68.36% | California | 17.03% | California | 60.43% | California | |
| Electrify America | Y | Electrify America | Corporate | 3487 | 647017 | 174 | 1027 | 7 | 3313 | 645990 | 350 | 3.14% | 14.92% | 0.21% | 0.15% | 14.88% | 18.46% | California | 3.19% | California | 13.88% | California | |
| ChargePoint | Y | EVSE Electrify America | Corporate | 60393 | 545469 | 54585 | 361277 | 65 | 1856 | 148412 | 350 | 54.33% | 12.58% | 65.13% | 52.06% | 8.33% | 4.24% | California | 59.37% | California | 14.30% | California | |
| EVgo | Y | EVgo Electrify America | Corporate | 2502 | 136418 | 911 | 6540 | 7 | 1520 | 126150 | 350 | 2.25% | 3.15% | 1.09% | 0.94% | 6.83% | 3.61% | California | 3.18% | California | 4.99% | California | |
| Greenlots (Owned by Shell) | Y | EV Charging Greenlots | Corporate | 2872 | 61157 | 2329 | 16586 | 29 | 540 | 44271 | 460 | 2.58% | 1.41% | 2.78% | 2.39% | 2.43% | 1.27% | California | 3.22% | New York | 6.20% | California | |
| Nissan | Y | Nissan USA Nissan | Corporate | 2152 | 58113 | 1604 | 34632 | 22 | 547 | 23431 | 50 | 1.94% | 1.34% | 1.91% | 4.99% | 2.46% | 0.67% | California | 0.70% | California | 0.55% | California | |
| Blink Charging | Y | Blink Charging | Corporate | 3877 | 41774 | 3380 | 33043 | 115 | 74 | 3847 | 60 | 3.49% | 0.96% | 4.03% | 4.76% | 0.33% | 0.11% | California | 2.44% | California | 0.56% | California | |
| SemaConnect | Y | Buy EV charging | Corporate | 5547 | 39938 | 5547 | 39938 | 7 | - | - | - | 4.99% | 0.92% | 6.62% | 5.75% | 0.00% | 0.00% | California | 3.65% | California | 0.72% | California | |
| Francis Energy | Y | Fast Charging Francis Energy | Corporate | 460 | 30399 | 230 | 1649 | 7 | 230 | 28750 | 200 | 0.41% | 0.70% | 0.27% | 0.24% | 1.03% | 0.82% | Oklahoma | 60.03% | Oklahoma | 63.96% | Oklahoma | |
| EVConnect | Y | EV Connect | Corporate | 1001 | 25129 | 854 | 17836 | 29 | 147 | 7293 | 50 | 0.90% | 0.58% | 1.02% | 2.57% | 0.66% | 0.21% | California | 1.14% | California | 0.78% | California | |
| FPL EVolution | Y | FPL FPL EVolution | Corporate | 167 | 18319 | 92 | 656 | 7 | 63 | 17586 | 375 | 0.15% | 0.42% | 0.11% | 0.09% | 0.28% | 0.50% | Florida | 2.63% | Florida | 6.72% | Florida | |
| Volta | Y | Volta Charging | Corporate | 2156 | 16785 | 1952 | 14880 | 33 | 32 | 640 | 20 | 1.94% | 0.39% | 2.33% | 2.14% | 0.14% | 0.02% | California | 1.73% | California | 0.36% | California | |
| EVCS | Y | EVCS EVCS | Corporate | 559 | 5737 | 519 | 3737 | 7 | 40 | 2000 | 50 | 0.50% | 0.13% | 0.62% | 0.54% | 0.18% | 0.06% | California | 1.33% | California | 0.40% | California | |
| Powerflex | Y | PowerFlex | Corporate | 136 | 4404 | 109 | 2354 | 22 | 27 | 2050 | 150 | 0.12% | 0.10% | 0.13% | 0.34% | 0.12% | 0.06% | California | 0.38% | California | 0.34% | California | |
| Chevrolet | Y | Public Charging Chevrolet | Corporate | 125 | 4350 | 65 | 1350 | 23 | 60 | 3000 | 50 | 0.11% | 0.10% | 0.08% | 0.19% | 0.27% | 0.09% | Michigan | 1.24% | Michigan | 1.15% | Michigan | |
| OpConnect | Y | OpConnect - Hawaii | Corporate | 400 | 3864 | 379 | 2894 | 88 | 21 | 970 | 50 | 0.36% | 0.09% | 0.45% | 0.42% | 0.09% | 0.03% | Hawaii | 24.81% | Hawaii | 16.97% | Hawaii | |
| FLO | Y | Electric vehicle FLO | Corporate | 515 | 3747 | 513 | 3647 | 7 | 2 | 100 | 50 | 0.46% | 0.09% | 0.61% | 0.53% | 0.01% | 0.00% | California | 0.59% | California | 0.11% | California | |
| ZEF | Y | ZEF Energy | Corporate | 69 | 3209 | 5 | 108 | 22 | 64 | 3101 | 50 | 0.06% | 0.07% | 0.01% | 0.02% | 0.29% | 0.09% | Minnesota | 4.16% | Minnesota | 5.20% | Minnesota | |
| Electric Vehicle Institute | Y | EVI Electric Vehicle Institute | Corporate | 65 | 3009 | 12 | 259 | 22 | 53 | 2750 | 150 | 0.06% | 0.07% | 0.01% | 0.04% | 0.24% | 0.08% | Maryland | 2.18% | Maryland | 2.94% | Maryland | |
| LADWP | Y | Public Charging LADWP | Government | 100 | 2628 | 83 | 1778 | 29 | 17 | 850 | 50 | 0.09% | 0.06% | 0.10% | 0.26% | 0.08% | 0.02% | California | 0.29% | California | 0.21% | California | |
| Caltrans | Y | California Department of Transportation | Government | 50 | 2386 | 4 | 86 | 22 | 46 | 2300 | 50 | 0.04% | 0.06% | 0.00% | 0.01% | 0.21% | 0.07% | California | 0.15% | California | 0.19% | California | |
| [Non-networked] | | | | 1569 | 50783 | 1275 | 27429 | 25 | 286 | 23272 | 350 | 1.41% | 1.17% | 1.52% | 3.95% | 1.28% | 0.67% | California | 0.95% | California | 0.82% | California | |
| EVolveNY | | | | 34 | 11106 | - | - | - | 31 | 10056 | 350 | 0.03% | 0.26% | 0.00% | 0.00% | 0.14% | 0.29% | New York | 0.52% | New York | 5.52% | - | |
| Webasto | | | | 59 | 2070 | 31 | 670 | 22 | 28 | 1400 | 50 | 0.05% | 0.05% | 0.04% | 0.10% | 0.13% | 0.04% | Oregon | 2.23% | Oregon | 2.12% | Oregon | |
| EV Gateway | | | | 51 | 1740 | 30 | 590 | 22 | 21 | 1150 | 150 | 0.05% | 0.04% | 0.04% | 0.09% | 0.09% | 0.03% | California | 0.11% | California | 0.09% | California | |
| Hampton Inn | | | | 20 | 1044 | 9 | 194 | 22 | 11 | 850 | 150 | 0.02% | 0.02% | 0.01% | 0.03% | 0.05% | 0.02% | Alabama | 0.77% | Alabama | 1.08% | Alabama | |
| Livingston | | | | 47 | 1015 | 47 | 1015 | 22 | - | - | - | 0.04% | 0.02% | 0.06% | 0.15% | 0.00% | 0.00% | New York | 0.72% | New York | 0.50% | New York | |
| Shell Recharge | | | | 9 | 878 | - | - | - | 9 | 878 | 175 | 0.01% | 0.02% | 0.00% | 0.00% | 0.04% | 0.03% | California | 0.03% | California | 0.07% | - | |
| Sun Country Highway | | | | 85 | 803 | 85 | 803 | 39 | - | - | - | 0.08% | 0.02% | 0.10% | 0.12% | 0.00% | 0.00% | California | 0.06% | California | 0.02% | California | |
| Holiday Inn | | | | 13 | 751 | 7 | 151 | 22 | 6 | 600 | 150 | 0.01% | 0.02% | 0.01% | 0.02% | 0.03% | 0.02% | California | 0.01% | Georgia | 0.14% | California | |
| 7-Eleven | | | | 14 | 700 | - | - | - | 14 | 700 | 50 | 0.01% | 0.02% | 0.00% | 0.00% | 0.06% | 0.02% | Florida | 0.22% | Florida | 0.26% | - | |
| EVgo | | | | 63 | 672 | 53 | 633 | 54 | 14 | 700 | 50 | 0.05% | 0.01% | 0.02% | 0.08% | 0.08% | 0.08% | California | 0.11% | California | 0.03% | California | |
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| | Basics | | | Network Size | | | | | | | | Relevance | | | | | | | | | | | |
| Operator Name | Selected for Deeper Dive | Website | Corporate or Government Ownership | Total number of public charge points in region | Total public power capability in the region | Number of public AC charge points in region | Public AC power capability in the region | Max AC Power Offering | Number of public DC charge points in region | Public DC power capability in the region | Max DC power offering | Regional percent of points | Regional percent of power | Regional percent of AC points | Regional percent of AC power | Regional percent of DC points | Regional percent of DC power | Largest market in region by points | Percent of points in largest market | Largest market in region by total power | Percent of power in largest market | Largest market in region by AC points | |
| [Name] | [Y/N] | [URL] | (Corporate / Gov't) | [#] | (kW) | [#] | (kW) | (kW) | [#] | (kW) | (kW) | % | % | % | % | % | % | [State] | % | [State] | % | [State] | |
| Tesla | Y | Charging Tesla | Corporate | 22402 | 2604750 | 8850 | 117308 | 48 | 13126 | 2391663 | 250 | 20.15% | 60.08% | 10.56% | 16.90% | 58.95% | 68.36% | California | 17.03% | California | 60.43% | California | |
| Electrify America | Y | Electrify America | Corporate | 3487 | 647017 | 174 | 1027 | 7 | 3313 | 645990 | 350 | 3.14% | 14.92% | 0.21% | 0.15% | 14.88% | 18.46% | California | 3.19% | California | 13.88% | California | |
| ChargePoint | Y | EVSE Electrify America | Corporate | 60393 | 545469 | 54585 | 361277 | 65 | 1856 | 148412 | 350 | 54.33% | 12.58% | 65.13% | 52.06% | 8.33% | 4.24% | California | 59.37% | California | 14.30% | California | |
| EVgo | Y | EVgo Electrify America | Corporate | 2502 | 136418 | 911 | 6540 | 7 | 1520 | 126150 | 350 | 2.25% | 3.15% | 1.09% | 0.94% | 6.83% | 3.61% | California | 3.18% | California | 4.99% | California | |
| Greenlots (Owned by Shell) | Y | EV Charging Greenlots | Corporate | 2872 | 61157 | 2329 | 16586 | 29 | 540 | 44271 | 460 | 2.58% | 1.41% | 2.78% | 2.39% | 2.43% | 1.27% | California | 3.22% | New York | 6.20% | California | |
| Nissan | Y | Nissan USA Nissan | Corporate | 2152 | 58113 | 1604 | 34632 | 22 | 547 | 23431 | 50 | 1.94% | 1.34% | 1.91% | 4.99% | 2.46% | 0.67% | California | 0.70% | California | 0.55% | California | |
| Blink Charging | Y | Blink Charging | Corporate | 3877 | 41774 | 3380 | 33043 | 115 | 74 | 3847 | 60 | 3.49% | 0.96% | 4.03% | 4.76% | 0.33% | 0.11% | California | 2.44% | California | 0.56% | California | |
| SemaConnect | Y | Buy EV charging | Corporate | 5547 | 39938 | 5547 | 39938 | 7 | - | - | - | 4.99% | 0.92% | 6.62% | 5.75% | 0.00% | 0.00% | California | 3.65% | California | 0.72% | California | |
| Francis Energy | Y | Fast Charging Francis Energy | Corporate | 460 | 30399 | 230 | 1649 | 7 | 230 | 28750 | 200 | 0.41% | 0.70% | 0.27% | 0.24% | 1.03% | 0.82% | Oklahoma | 60.03% | Oklahoma | 63.96% | Oklahoma | |
| EVConnect | Y | EV Connect | Corporate | 1001 | 25129 | 854 | 17836 | 29 | 147 | 7293 | 50 | 0.90% | 0.58% | 1.02% | 2.57% | 0.66% | 0.21% | California | 1.14% | California | 0.78% | California | |
| FPL EVolution | Y | FPL FPL EVolution | Corporate | 167 | 18319 | 92 | 656 | 7 | 63 | 17586 | 375 | 0.15% | 0.42% | 0.11% | 0.09% | 0.28% | 0.50% | Florida | 2.63% | Florida | 6.72% | Florida | |
| Volta | Y | Volta Charging | Corporate | 2156 | 16785 | 1952 | 14880 | 33 | 32 | 640 | 20 | 1.94% | 0.39% | 2.33% | 2.14% | 0.14% | 0.02% | California | 1.73% | California | 0.36% | California | |
| EVCS | Y | EVCS EVCS | Corporate | 559 | 5737 | 519 | 3737 | 7 | 40 | 2000 | 50 | 0.50% | 0.13% | 0.62% | 0.54% | 0.18% | 0.06% | California | 1.33% | California | 0.40% | California | |
| Powerflex | Y | PowerFlex | Corporate | 136 | 4404 | 109 | 2354 | 22 | 27 | 2050 | 150 | 0.12% | 0.10% | 0.13% | 0.34% | 0.12% | 0.06% | California | 0.38% | California | 0.34% | California | |
| Chevrolet | Y | Public Charging Chevrolet | Corporate | 125 | 4350 | 65 | 1350 | 23 | 60 | 3000 | 50 | 0.11% | 0.10% | 0.08% | 0.19% | 0.27% | 0.09% | Michigan | 1.24% | Michigan | 1.15% | Michigan | |
| OpConnect | Y | OpConnect - Hawaii | Corporate | 400 | 3864 | 379 | 2894 | 88 | 21 | 970 | 50 | 0.36% | 0.09% | 0.45% | 0.42% | 0.09% | 0.03% | Hawaii | 24.81% | Hawaii | 16.97% | Hawaii | |
| FLO | Y | Electric vehicle FLO | Corporate | 515 | 3747 | 513 | 3647 | 7 | 2 | 100 | 50 | 0.46% | 0.09% | 0.61% | 0.53% | 0.01% | 0.00% | California | 0.59% | California | 0.11% | California | |
| ZEF | Y | ZEF Energy | Corporate | 69 | 3209 | 5 | 108 | 22 | 64 | 3101 | 50 | 0.06% | 0.07% | 0.01% | 0.02% | 0.29% | 0.09% | Minnesota | 4.16% | Minnesota | 5.20% | Minnesota | |
| Electric Vehicle Institute | Y | EVI Electric Vehicle Institute | Corporate | 65 | 3009 | 12 | 259 | 22 | 53 | 2750 | 150 | 0.06% | 0.07% | 0.01% | 0.04% | 0.24% | 0.08% | Maryland | 2.18% | Maryland | 2.94% | Maryland | |
| LADWP | Y | Public Charging LADWP | Government | 100 | 2628 | 83 | 1778 | 29 | 17 | 850 | 50 | 0.09% | 0.06% | 0.10% | 0.26% | 0.08% | 0.02% | California | 0.29% | California | 0.21% | California | |
| Caltrans | Y | California Department of Transportation | Government | 50 | 2386 | 4 | 86 | 22 | 46 | 2300 | 50 | 0.04% | 0.06% | 0.00% | 0.01% | 0.21% | 0.07% | California | 0.15% | California | 0.19% | California | |
| [Non-networked] | | | | 1569 | 50783 | 1275 | 27429 | 25 | 286 | 23272 | 350 | 1.41% | 1.17% | 1.52% | 3.95% | 1.28% | 0.67% | California | 0.95% | California | 0.82% | California | |
| EVolveNY | | | | 34 | 11106 | - | - | - | 31 | 10056 | 350 | 0.03% | 0.26% | 0.00% | 0.00% | 0.14% | 0.29% | New York | 0.52% | New York | 5.52% | - | |
| Webasto | | | | 59 | 2070 | 31 | 670 | 22 | 28 | 1400 | 50 | 0.05% | 0.05% | 0.04% | 0.10% | 0.13% | 0.04% | Oregon | 2.23% | Oregon | 2.12% | Oregon | |
| EV Gateway | | | | 51 | 1740 | 30 | 590 | 22 | 21 | 1150 | 150 | 0.05% | 0.04% | 0.04% | 0.09% | 0.09% | 0.03% | California | 0.11% | California | 0.09% | California | |
| Hampton Inn | | | | 20 | 1044 | 9 | 194 | 22 | 11 | 850 | 150 | 0.02% | 0.02% | 0.01% | 0.03% | 0.05% | 0.02% | Alabama | 0.77% | Alabama | 1.08% | Alabama | |
| Livingston | | | | 47 | 1015 | 47 | 1015 | 22 | - | - | - | 0.04% | 0.02% | 0.06% | 0.15% | 0.00% | 0.00% | New York | 0.72% | New York | 0.50% | New York | |
| Shell Recharge | | | | 9 | 878 | - | - | - | 9 | 878 | 175 | 0.01% | 0.02% | 0.00% | 0.00% | 0.04% | 0.03% | California | 0.03% | California | 0.07% | - | |
| Sun Country Highway | | | | 85 | 803 | 85 | 803 | 39 | - | - | - | 0.08% | 0.02% | 0.10% | 0.12% | 0.00% | 0.00% | California | 0.06% | California | 0.02% | California | |
| Holiday Inn | | | | 13 | 751 | 7 | 151 | 22 | 6 | 600 | 150 | 0.01% | 0.02% | 0.01% | 0.02% | 0.03% | 0.02% | California | 0.01% | Georgia | 0.14% | California | |
| 7-Eleven | | | | 14 | 700 | - | - | - | 14 | 700 | 50 | 0.01% | 0.02% | 0.00% | 0.00% | 0.06% | 0.02% | Florida | 0.22% | Florida | 0.26% | - | |
| EVgo | | | | 63 | 677 | 53 | 633 | 54 | 14 | 700 | 50 | 0.05% | 0.01% | 0.02% | 0.08% | 0.08% | 0.08% | California | 0.11% | California | 0.03% | California | |
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