



EV Charging Infrastructure in Europe and North America

5th Edition

EV Charging Infrastructure in Europe and North America is the fifth strategy report from Berg Insight analysing the latest developments on the electric vehicle charging market in these two regions. The report covers all parts of the value chain including charge point operators, car OEM initiatives, and hardware and software vendors. This strategic research report provides you with 250 pages of unique business intelligence, including 5-year industry forecasts, expert commentary and real-life case studies on which to base your business decisions.

The number of connected EV charging points in Europe and North America to reach 35.6 million by 2030

Electric vehicle (EV) charging refers to the process of charging a battery electric vehicle or plug-in hybrid electric vehicle from an external power source. The external power source is often a charging station, which is defined as equipment enabling a connection between the electric vehicle and the power grid. EV charging stations play a significant role in the discussions regarding the electrification of vehicle fleets. Electric vehicles and EV charging stations are often brought forward as a prerequisite in order to decrease the environmental impact of transportation.

Berg Insight is of the opinion that the market for EV charging solutions is in a growth phase which will last for several years to come. Mega-challenges such as vehicle emissions and climate change continue to encourage investments in EVs and their charging infrastructure, contributing to a positive outlook for the market. The total number of dedicated charging points in Europe is forecasted to grow at a compound annual growth rate (CAGR) of 21 percent from 12.0 million in 2025 to 31.6 million by the end of 2030. In North America, Berg Insight estimates that the total number of dedicated charging points will increase from 5.3 million in 2025 to reach 11.2 million in 2030, growing at a CAGR of 16 percent. These numbers include both private and public charging points.

Over the years, charging stations have evolved from being traditional non-connected hardware devices to smart devices using connectivity technologies like Wi-Fi and cellular. Charge point operators (CPOs) can remotely monitor and maintain charging stations, while EV drivers can locate chargers, monitor charging availability and manage payments. In 2025, the number of connected charging points in Europe is estimated to have reached 9.4 million units, corresponding to a penetration rate of 78 percent. In North America, the number of connected charging points is estimated to about 3.5 million, corresponding to a penetration rate of 66 percent. Most of the connected charging points in Europe and North America are either in public or semi-public applications. Connected home chargers are becoming more common too.

A group of established automotive and power electronics solution providers are among the leading EV charging station manufacturers in Europe. Some pure play charging station manufacturers are also developing into influential players. Examples of major hardware providers in the region include ABB, Alfen, Alpitronic, Circontrol, Compleo Charging Solutions, CTEK, DBT Group, Easee, Efacec, EVBox, Garo, IES Synergy, KEBA, Kempower, Mennekes, Pod, Rolec Services, Schneider Electric, Wallbox and Zaptec. While some companies specialise in either AC or DC chargers, others offer both. A few players additionally offer software and services as part of end-to-end offerings. Several CPOs develop backoffice platforms in-house, whereas others prefer third-party platforms from dedicated software providers. Examples

of significant software providers in Europe are AMPECO, Chargecloud, Drivz, GreenFlux, Last Mile Solutions, Monta and Virta.

In North America, there are a number of regional as well as international companies marketing EV chargers. ChargePoint is a leading player on the market and a full-service provider. Other major regional hardware providers include Ampure, BTC Power (E.ON), Blink Charging, Enphase and Flo. Tesla has also opened up sales of its DC Supercharger units to third party players. Several of the prominent companies in North America can provide end-to-end offerings including hardware, software and CPO services. The most prominent dedicated software providers in North America are EV Connect (part of Schneider Electric) and Canadian SWTCH.

There is a large number of CPOs in Europe. A few of these players have charging operations as their core business, but many actors come from adjacent markets. Examples of companies that are more or less specialised CPOs include Allego, Atlante, Fastned, Freshmile, InstaVolt and Ionity. Ionity was founded in 2017 by BMW Group, Ford Motor Company, Daimler and Volkswagen Group. Many of the CPOs in Europe are subsidiaries of utility companies. Examples of utilities operating CPO networks include CEZ Group, EnBW, Enel, ESB Group, Iberdrola Group, Innogy, Izivia and Vattenfall. The French CPO Izivia is a subsidiary of the French utility company EDF. Some CPOs in Europe have a background in the petroleum industry. Shell Recharge Solutions and BP Pulse are notable examples of petroleum companies entering EV charging. TotalEnergies operates a public charging network as well. Several of the petroleum companies and utilities have narrowed the scope of their EV charging operations substantially over recent years. In North America, Electrify America and EVgo are major pure play CPOs. Tesla is also a prominent player, operating its Supercharger and Destination Charging Networks in Europe and North America. The Tesla Supercharger network initially only served Tesla drivers, but a growing part of the network is now being opened up to also serve non-Tesla drivers.

The number of connected charging points (Europe and North America 2025–2030)

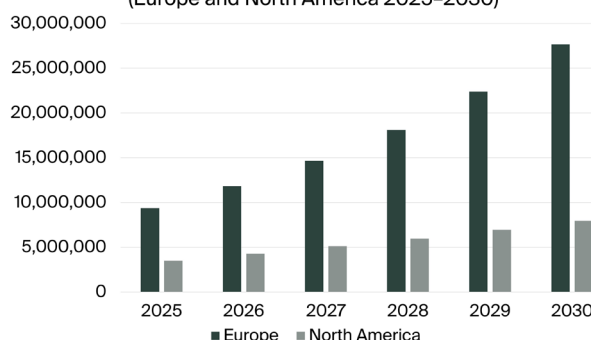


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Glossary

Highlights from the report

Insights from 30 executive interviews with market leading companies.

New data on EV charging infrastructure in Europe and North America.

Comprehensive description of the EV charging value chain and key applications.

In-depth analysis of market trends and key developments.

Profiles of 69 companies offering EV charging hardware and software.

Profiles of 37 charge point operators (CPOs).

Market forecasts lasting until 2030.

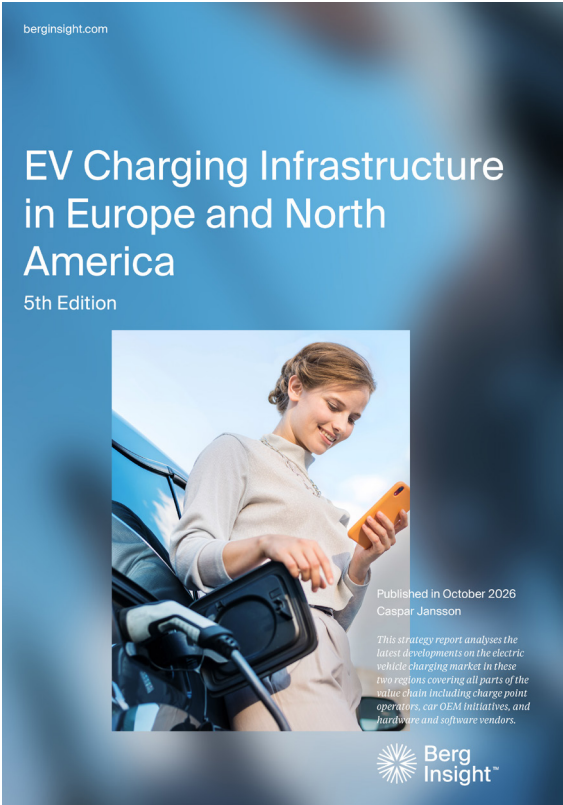
This report answers the following questions

- What is the current state and size of the EV charging market?
- What are the current trends on this market?
- Which are the leading providers of hardware and software solutions?
- What equipment and service offerings are available from the different vendors?
- Which are the leading charge point operators in Europe and North America?
- What are the key drivers behind the adoption of EV chargers?
- What impact will technology advancements have on the market?
- How will the EV charging industry evolve in the next 5 years?



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AUTOMOTIVE

EV Charging Infrastructure in Europe and North America

This study investigates the electric vehicle charging infrastructure market in Europe and North America covering all parts of the value chain including charge point operators, car OEM initiatives, and hardware and software vendors. About 5.8 million of these charging points in the two regions were monitored via cellular connections in 2025. Get up to date with the latest information about vendors, charge point operators, products and markets.

PUBLISHED DATE	October 2026
EDITION	5th
PAGES	250
AUTHOR	Caspar Jansson

PDF & EXCEL: 1 user license	€ 1 800
PDF & EXCEL: 2-10 user license	€ 2 700
PDF & EXCEL: Enterprise license	€ 3 600

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Who should read this report?

EV Charging Infrastructure in Europe and North America is the foremost source of information about this market. Whether you are a vehicle manufacturer, EV charging technology vendor, charge point operator, telecom operator, investor, consultant, or government agency, you will gain valuable insights from our in-depth research.

AUTHOR

Caspar Jansson



Caspar Jansson is a Senior Analyst with a Master's degree in Industrial Engineering and Management from Chalmers University of Technology. He joined Berg Insight in 2021 and his areas of expertise include automotive telematics, insurance telematics, public transport ITS and EV charging technology for both passenger cars and commercial vehicles.

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CONTACT

Berg Insight AB
Viktoriagatan 3
411 25 Gothenburg
Sweden

+46 (0)31 711 30 91
info@berginsight.com
www.berginsight.com



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