

Market Monitor Charging Stations for Electric Vehicles 2022 in European Key Markets

Shared Services | EUPD Research | September 2022



PERSPECTIVE, POTENTIAL, GROWTH OF THE MARKETS FOR CHARGING STATIONS

- ✓ With the transition to electric mobility the demand for charging infrastructure is growing unstoppable.
- ✓ A multi-billion market is taking off and the only question is in which countries and to what extent it will emerge worldwide.
- ✓ One of the early adopter markets is Germany and the demand for the 'Market Monitor Charging Stations 2021' proofed the high interest of manufacturers to get detailed insights regarding that development.
- ✓ After an evaluation under the top charging station manufacturers EUPD Research has identified those country markets that will show a remarkable and reliable growing demand.
- ✓ Round about 400,000 installers in Europe are the initial target group to be addressed and supported. They are the gate keepers to fulfil the needs of the exponential growing group of end customers.
- ✓ Beside the general market information the 'Market Monitor Charging Stations' for eight European key markets will deliver the insights behind their demand.

TOTAL NUMBER OF BEVS AND MARKET SHARE

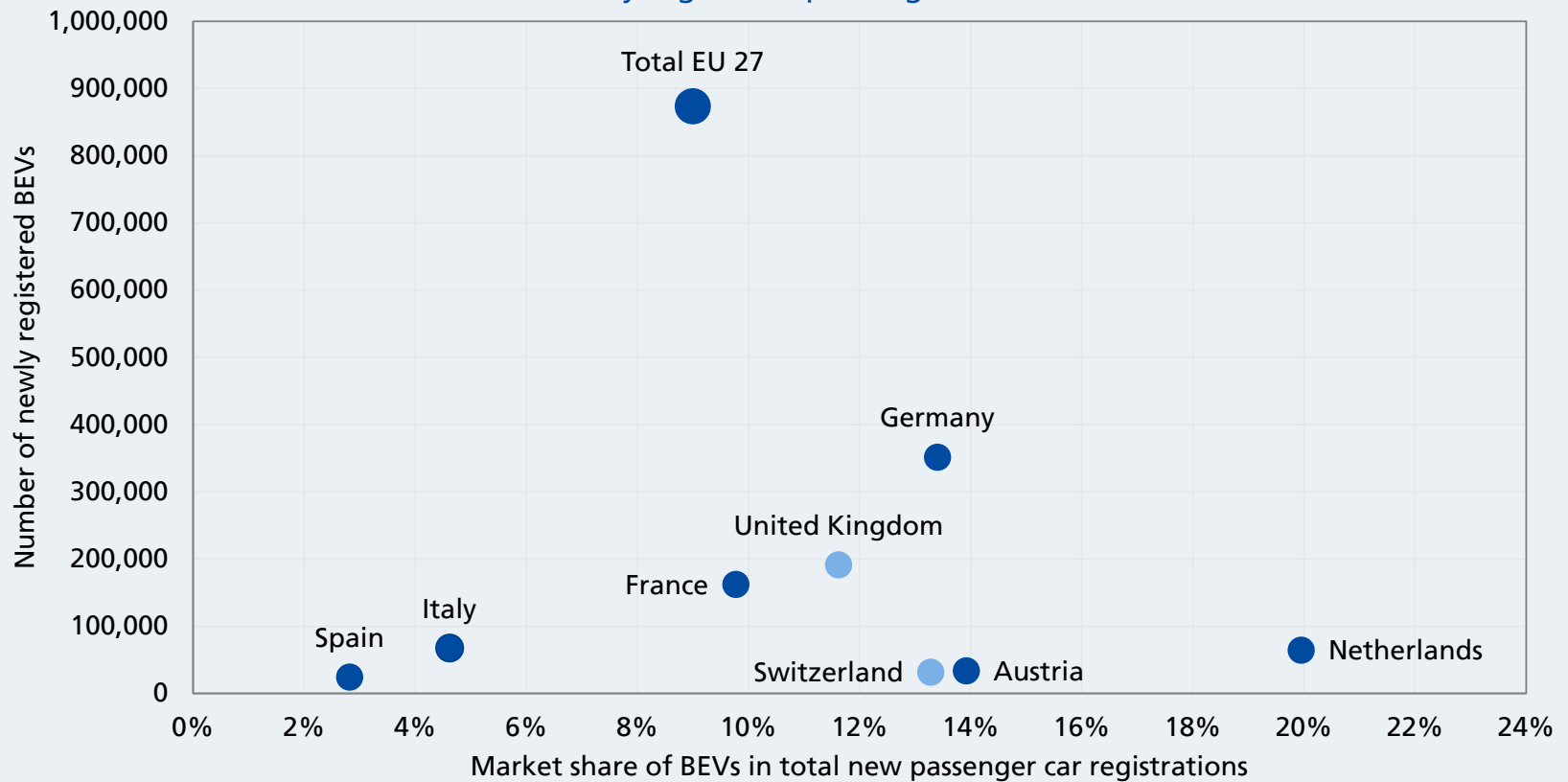
Number of newly registered BEVs



Market share of BEVs

Source: European Alternative Fuels Observatory

Number of newly registered BEVs and their share in the total number of newly registered passenger cars in 2021



THE GAP BETWEEN BEVS AND CHARGING POINTS

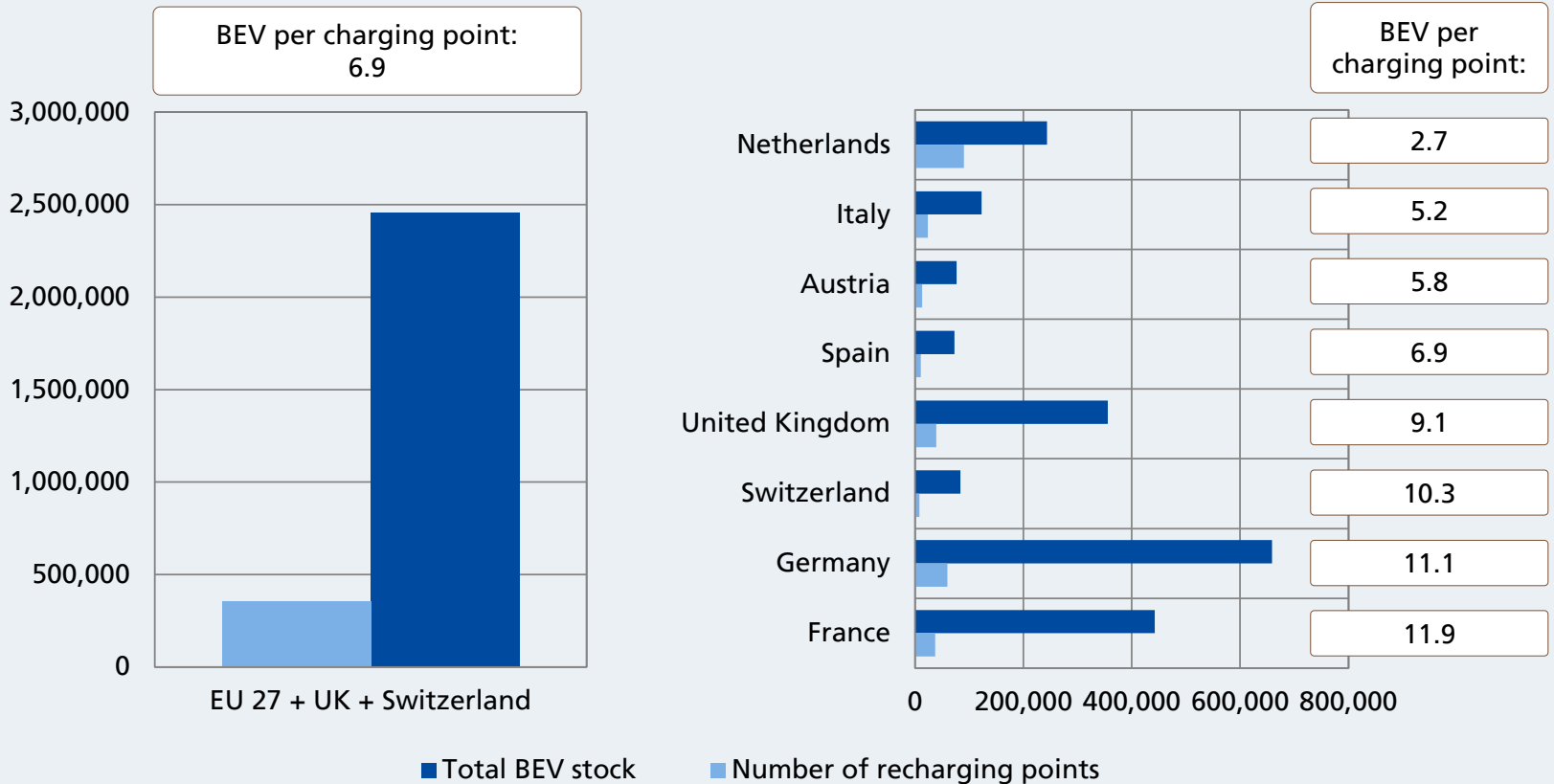
Total BEV stock



Number of recharging points

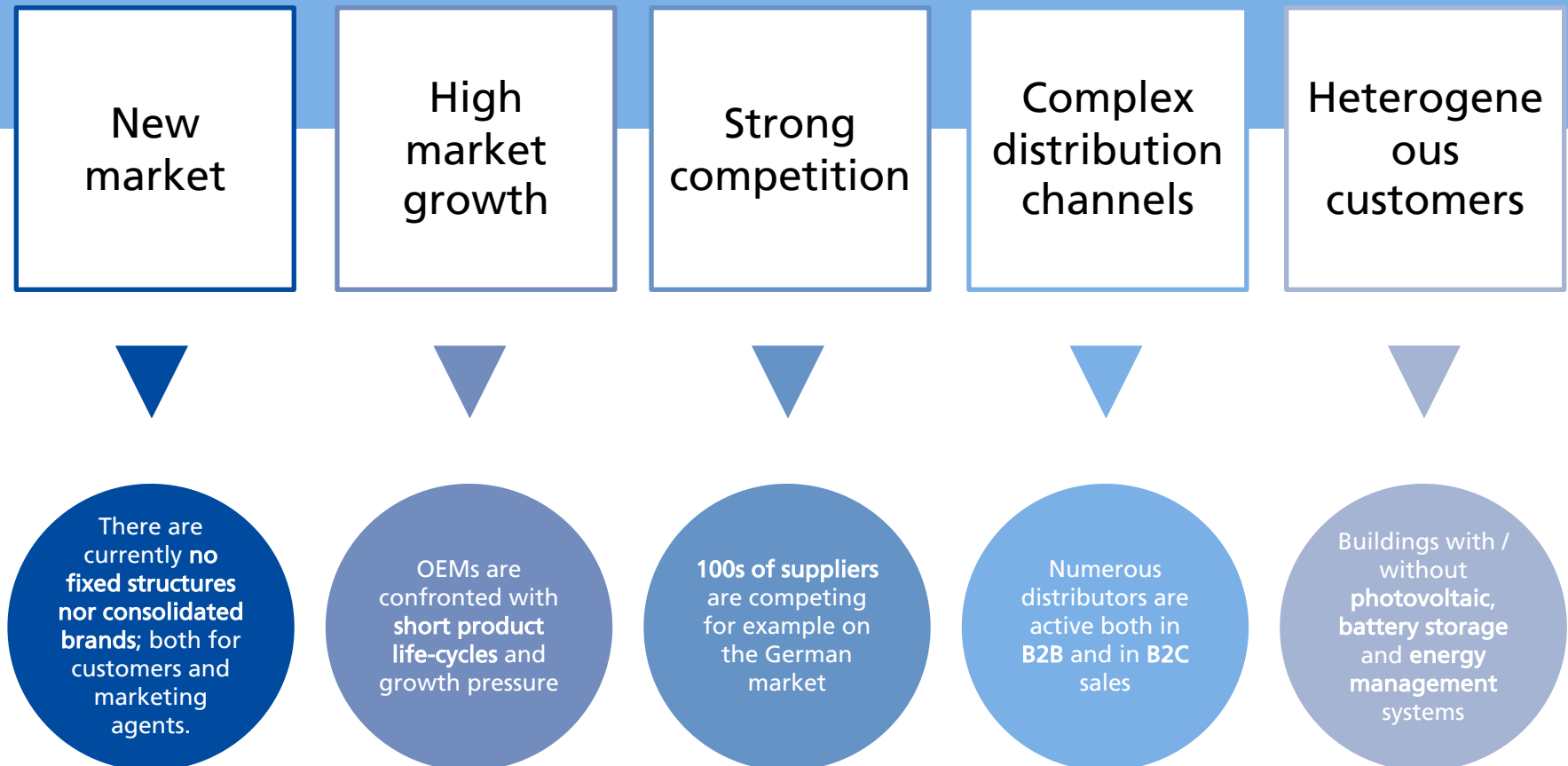
Source: European Alternative Fuels Observatory

Total BEV stock and recharging points as of December 2021



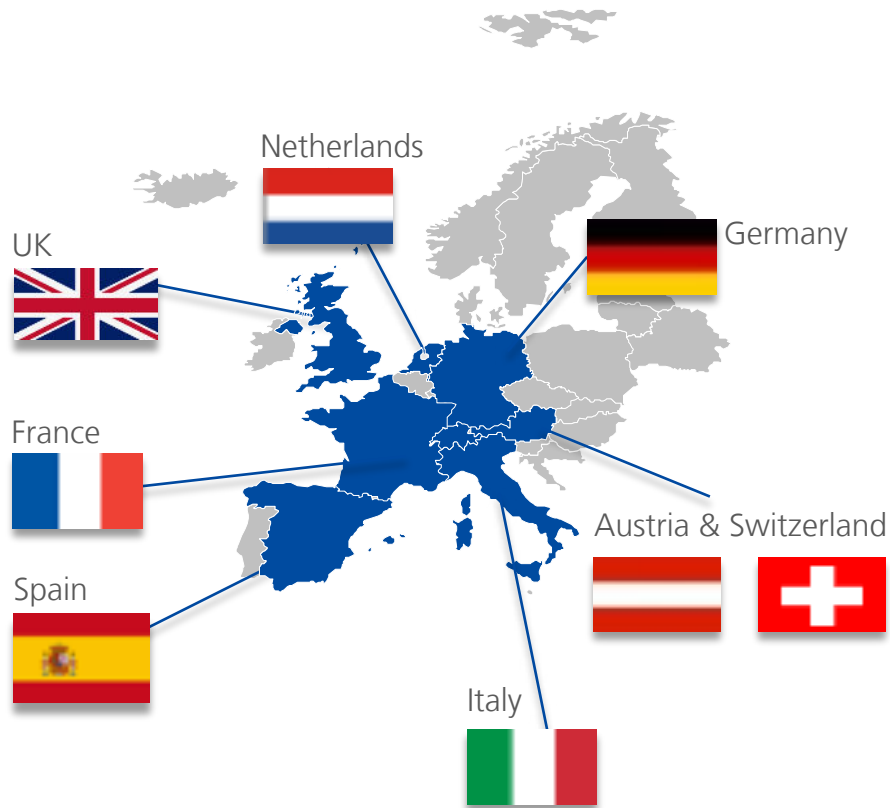
CHALLENGES FOR MARKET ACTORS

Market actors are facing various challenges:



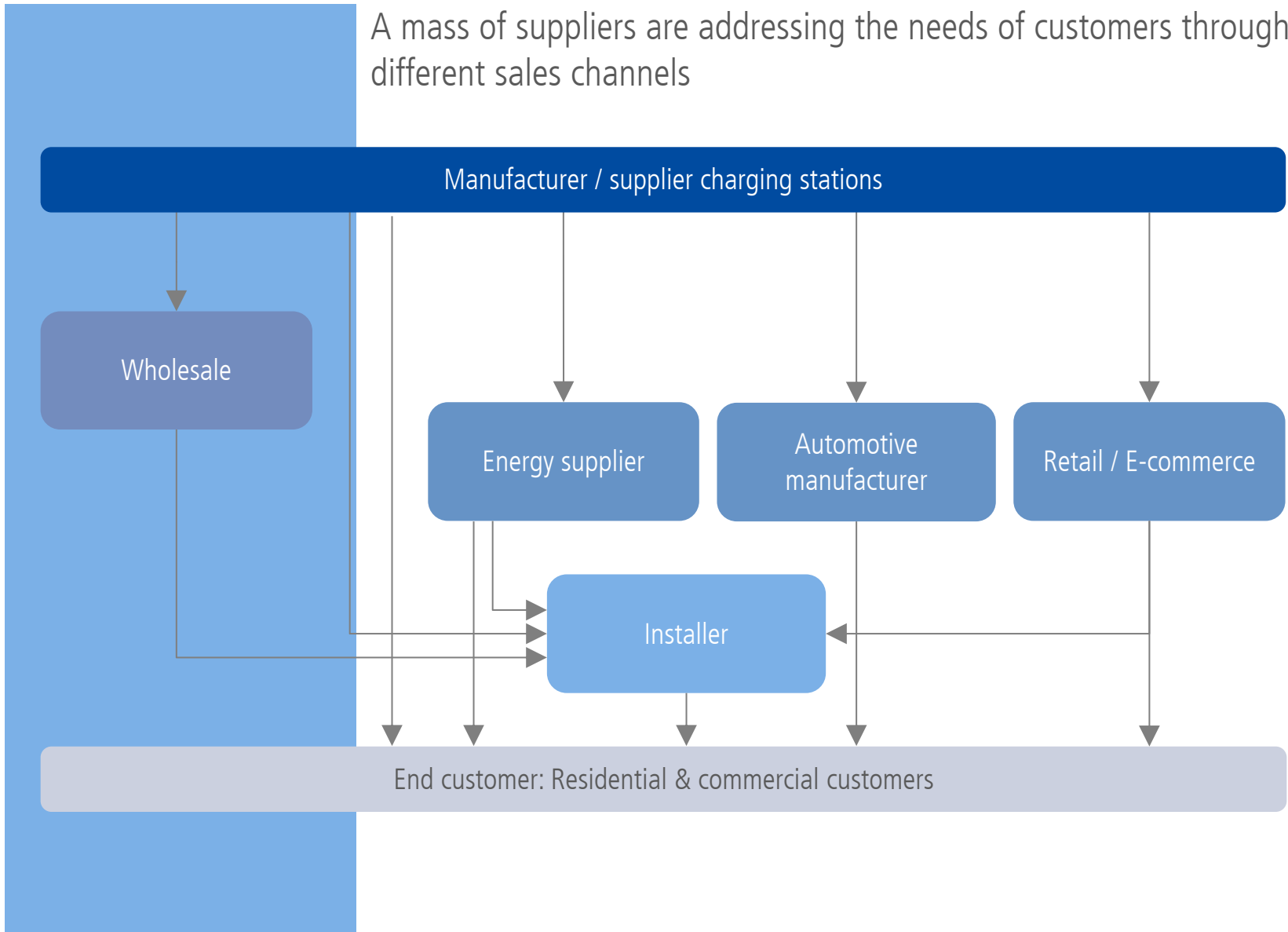
KEY MARKETS UNDER MONITORING

Eight countries as first movers and early adopters



- ✓ Overall population and number of e-vehicles matters.
- ✓ Gap between number of EV's and number of charging stations shows market potential.
- ✓ Political frame conditions, promotional bonus and subsidies work as booster.
- ✓ General challenging frame conditions regarding energy supply contribute in addition towards a positive demand effect.

A mass of suppliers are addressing the needs of customers through different sales channels



This study relies on the data collected through a survey conducted among electric installation companies that have the interest to deal with the installation of wallboxes.

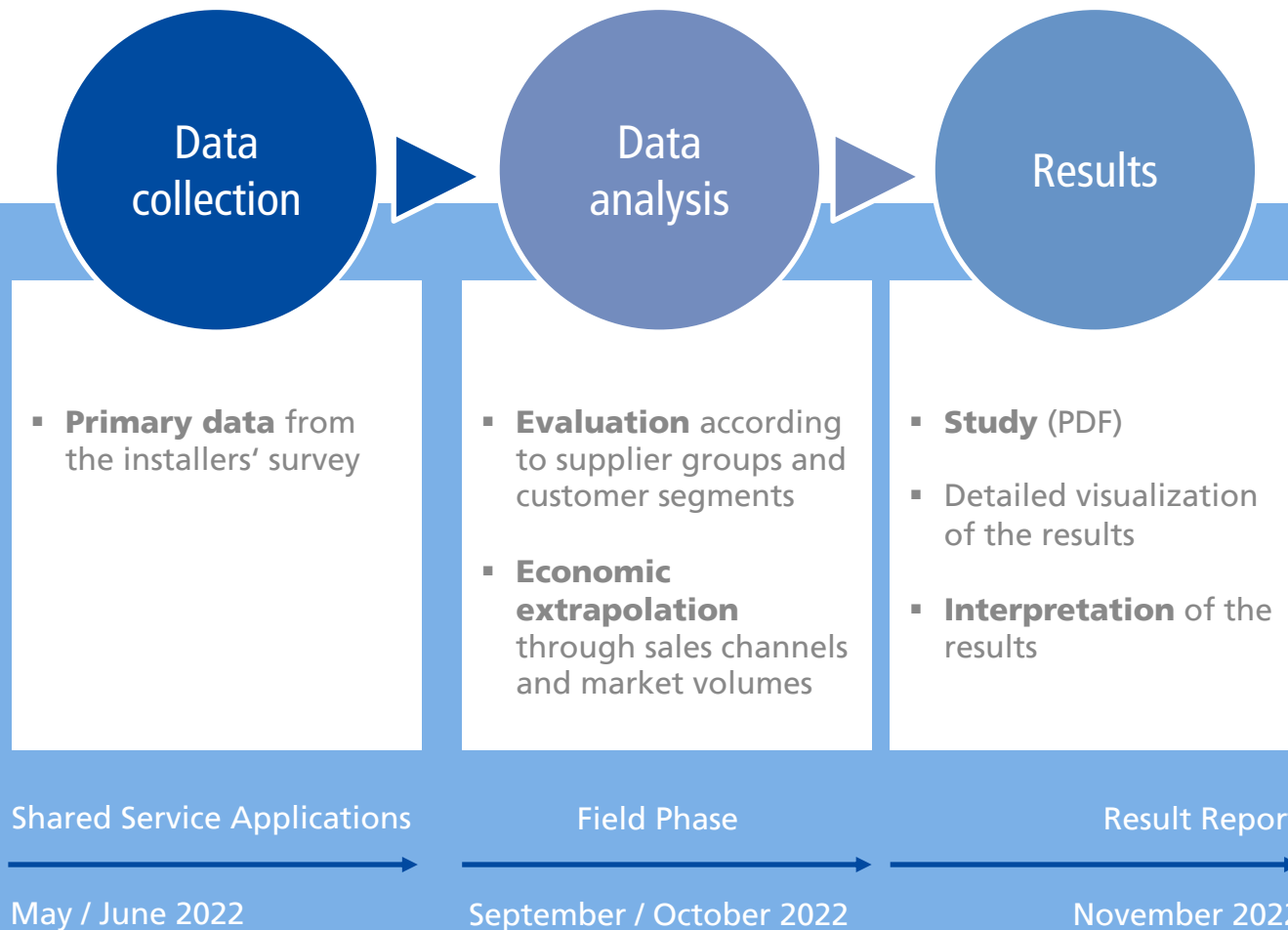


Data collection

- Samples per country: **Electric installation companies**
- Wallbox suppliers: **~ 300+ suppliers**
- Wallbox models: **~ 900+ models**
- Survey coverage: **Electric installation companies**
(representatives for the overall sample)
- Survey typology: **CATI Interviews**
(Computer Assisted Telephone Interview)

FROM DATA COLLECTION TO INSIGHTS

This study offers a comprehensive overview of the individual markets for charging stations and provides detailed insights from the perspective of installers.



ADDED VALUE FOR MANY AREAS

The study offers exclusive insights regarding:

Market players

Products

Distribution channels

Drivers & Barriers

Market structures

Providing added value for the implementation of:

Efficient marketing campaigns

Optimal product positioning in the portfolio of retailers and installers

Price optimization

Comprehensive market overview and forecast

Service packages tailored to the target groups

1. Market overview charging stations for EV's in each country

- a. Market volume BEV and EVSE 2021
- b. Framework conditions
- c. Market volume 2022
- d. Market forecast

2. Procurement management

- a. Procurement channels of installers
- b. Market Map: distribution structure for charging stations

3. Product analysis

- a. Brands
- b. Technology
- c. Installation
- d. Service
- e. Customer satisfaction

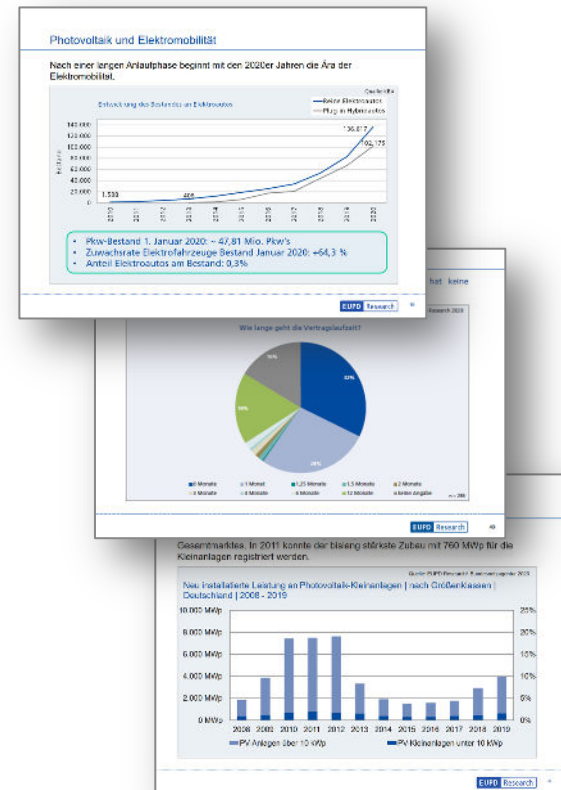
4. Buying process

- a. Motives
- b. Information gathering
- c. Drivers & Barriers

1. MARKET OVERVIEW CHARGING STATIONS

The chapter dedicated to the market overview introduces the topic and provides the prerequisites for the following analyses, more specifically, the total volume of charging stations installed including their suppliers, providers and distributors is presented.

The economic extrapolation exhibits the total number of charging stations installed. By combining this data with prices the market volume in Euro is calculated. Finally, the market forecast for the installation of charging stations is obtained by taking into account the installers' survey results, as well as the forecasted registration figures for electric cars.



THE CHANNELS FOR THE PRODUCTS

2. PROCUREMENT MANAGEMENT

The chapter dedicated to procurement management focuses on the process that brings charging stations from suppliers to customers; differentiating between a two-stage sales approach (direct purchase from suppliers) and a three-stages sales approach (through wholesale, marketing agents, energy providers etc.).

The different supply channels are analysed considering their relevance and benefits they provide to customers, based on the information collected through the installers' survey. Moreover, a deeper evaluation of the wholesale channel is carried out based solely on the results of the installers' survey.

The results from the market overview as well as data from the installers' survey are being pooled into a market map. The latter exhibits the detailed amounts of charging stations delivered through the different distribution channels by customer group and by type of installation company.

3. PRODUCT ANALYSIS

Brand

- Unaided brand awareness (Supplier, product)
- First 5 mentions

Technology

- Product type (charging pole, wallbox)
- AC / DC proportion
- Power class (one/three phases; 3.7 to 4.6 kW, 11 kW, 22 kW)

Installation

- Place of installation (single or multi-family dwelling, company, public space, car park → house wall, garage, carport etc.)
- System configuration (PV, battery storage, smart home etc.)

Service

- Consulting offer of the installer
- Installation workload
- Installation costs and allocation
- Service offer of the installer after commissioning

Customer satisfaction

- Importance and satisfaction with product and suppliers' service
- Probability of recommendation (Net Promoter Score)

4. BUYING PROCESS

In this chapter the results from the installers' survey are presented according to each single step of the buying process. Including motives, drivers and barriers as well as information gathering. Further, the analysis is carried out differentiating between the different customer groups.

Motives

- Visualization and evaluation of buying motives from the perspective of the installers

Information gathering

- Information sources and their relevance for buyers of charging stations
- Information sources for installers

Drivers & Barriers

- Public subsidies (knowledge, offer, evaluation)
- Service offer from suppliers to installers (partner programs, technical trainings for charging stations, marketing support)

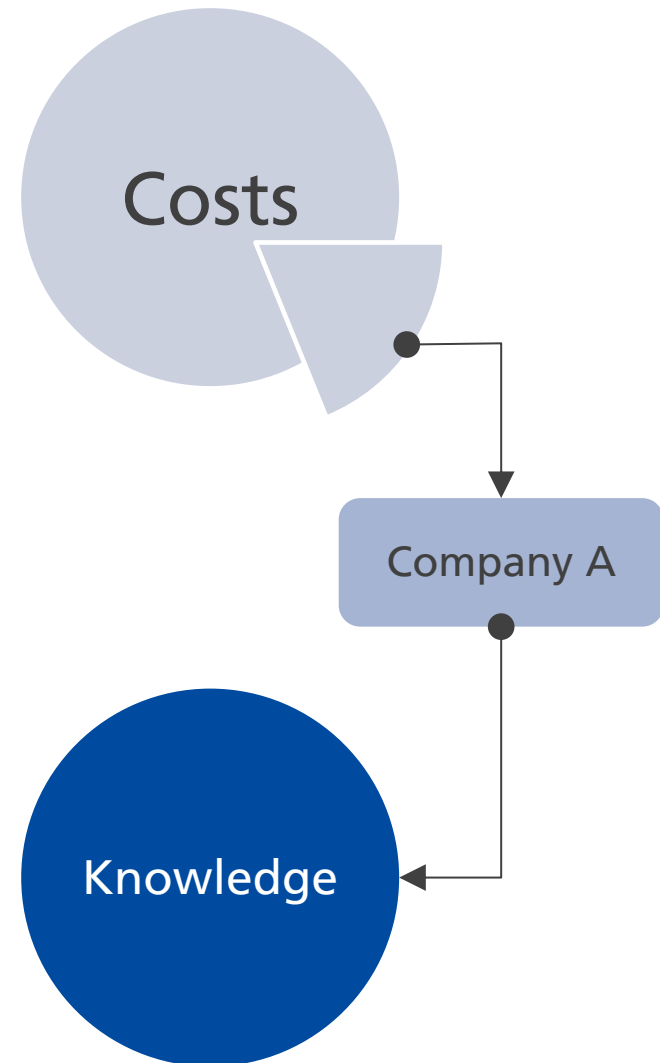
Customer groups

- Private households, companies, public sector

Invest and profit together!

The realization of the 'Market Monitor Charging Stations for Electric Vehicles' requires substantial investments for design, questionnaire, installers survey, secondary research, analysis and study realization.

Participation through the Shared Service allows a reduced number of clients to share costs and obtain exclusive access to the complete results of the study.



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