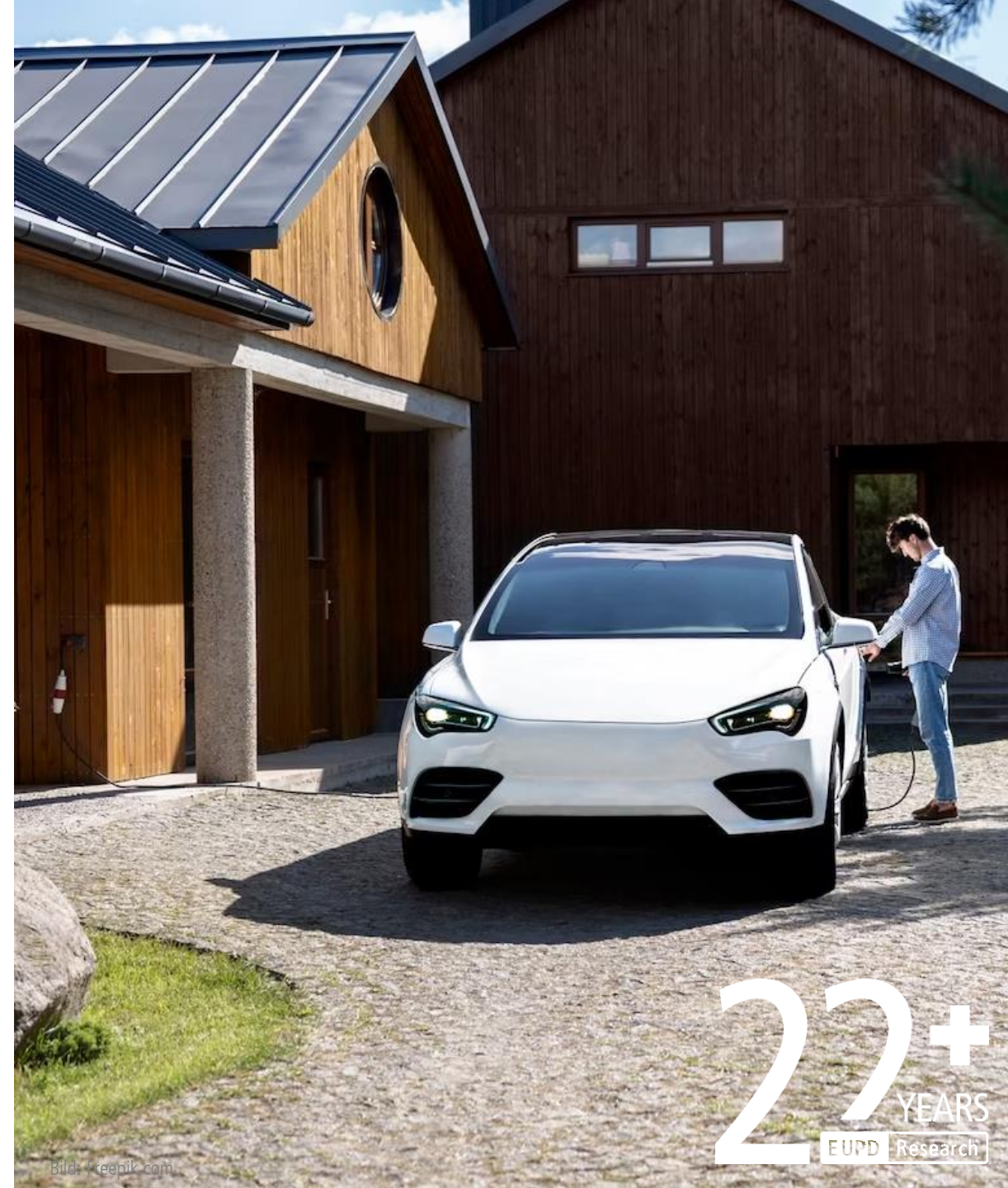


EV Charging Stations Monitor[©] 2023/2024

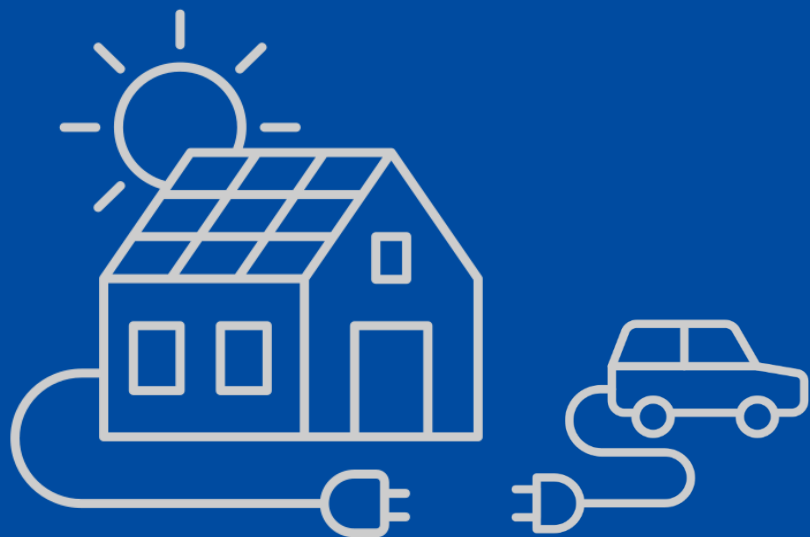
Understanding the installers' view of the EV charging station market

Primary survey of EV charging station installers

EUPD Research | Shared Service | September 2023



EV Charging Stations Monitor[©] 2023/2024



Private EV charging types

1. Charging with household electricity
2. Solar charging with PV surplus electricity

Study Background

Home charging of electric vehicles is a logical next step in the development of sustainable and future-proof home energy systems. It supports the acceptance of EVs, reduces the pressure on public charging stations and promotes energy independence, grid stability and environmental friendliness.

A wide range of components is available to create smart solutions. The integration of solar power, storage, energy management and home charging for electric vehicles is a logical consequence.

Growing consumer e-mobility is creating business opportunities for charging infrastructure manufacturers, smart grid operators and related renewable energy sectors.

From Components to Solutions

- High quality and compatibility of intelligent charging components is imperative
- The ability to communicate and work in a holistic system is necessary
- Integration into a home energy management system is a clear advantage
- Solar charging is the most economical solution for PV system owners
- Bi-directional charging allows those without a PV system to benefit from the price differences of fluctuating renewable energies
- Sector coupling is the way to go



Those who benefit from the EV Charging Station Monitor©:

Target groups:

- Charging Station Manufacturers
- Distributors
- Energy Providers
- High-Volume Installers
- Investors, Financial Institutions
- Energy Management Solution Providers
- Solar and Storage Manufacturers

Reliable data of the most important KPI's of each CS manufacturer

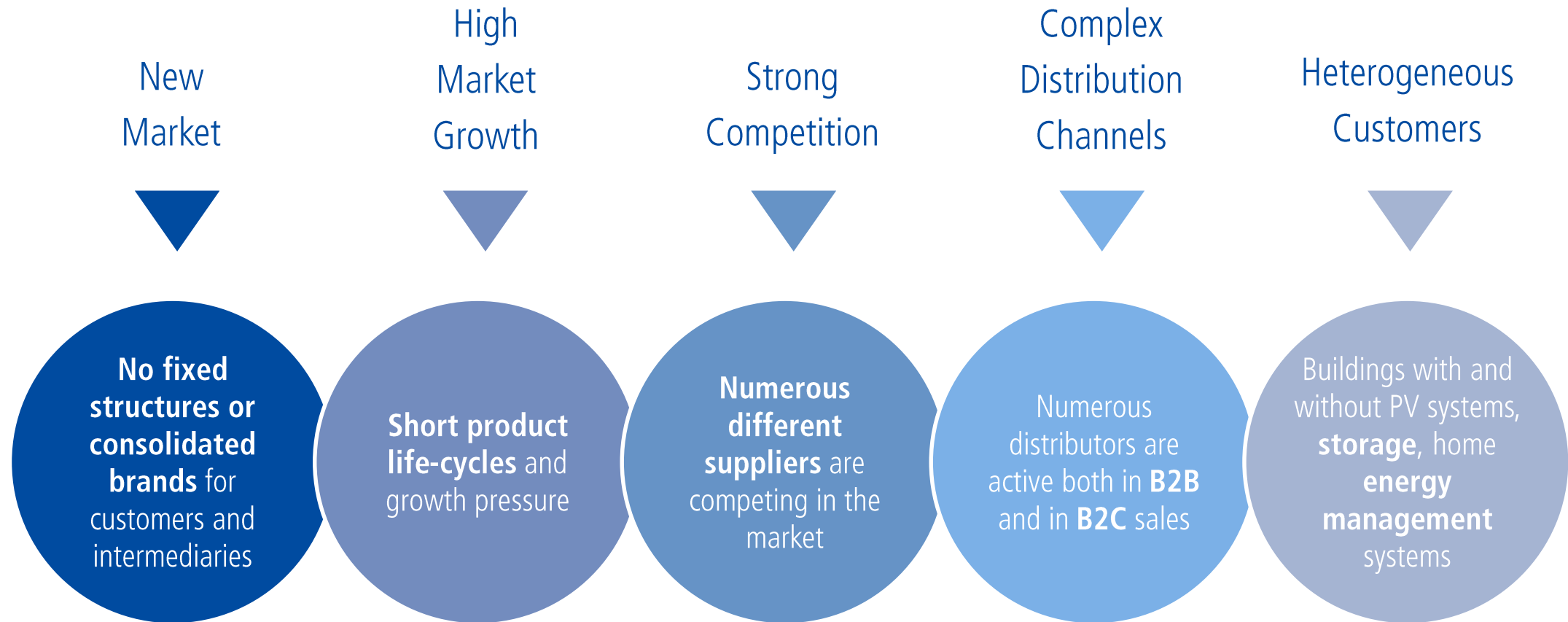
Essential feedback regarding the buying decision process of installers

In-depth evaluation of CS manufacturers for partnerships

Benchmark information for best-in-class portfolio planning

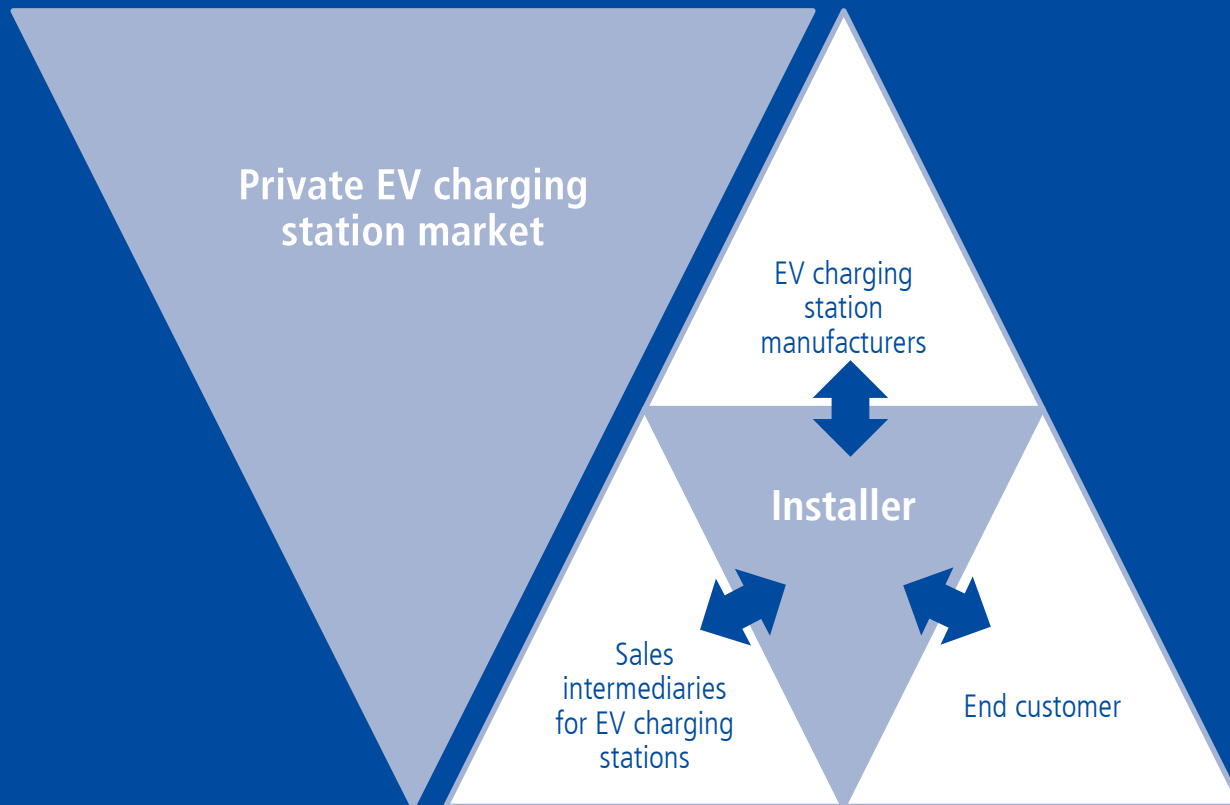
Information about Key Performance Properties of each brand

Challenges for Market Actors



Installers as Gate Keepers

As installers interact with manufacturers, intermediaries and users they play an important role in promoting EV charging station products and services to end customers.



Market players can benefit from the expertise and experience of installers:

- Receive feedback on the use and performance of products
- Gain a better understanding of market and customer requirements as well as challenges
- Improve the products and services to meet the demands and needs of the market
- Identify new business opportunities based on installer experiences
- Ensure the quality of their products and services by working with installers
- Improve products by drawing on the experience and recommendations of installers

From Insights to Advanced Knowledge

The study provides exclusive information on:

- Market structures
- Market players
- Installer portfolios
- Procurement channels
- Products and brands

... which leads to added value for the implementation of ...

Efficient marketing campaigns and measures

Optimal product positioning in the market and with installers

Adjusted business strategies

Better understanding of customer motives

Further customized analytics for target groups

Content of the EV Charging Stations Monitor© 2023/2024

Survey Sample

The survey sample consists of installation companies that install EV charging stations.

This group includes:

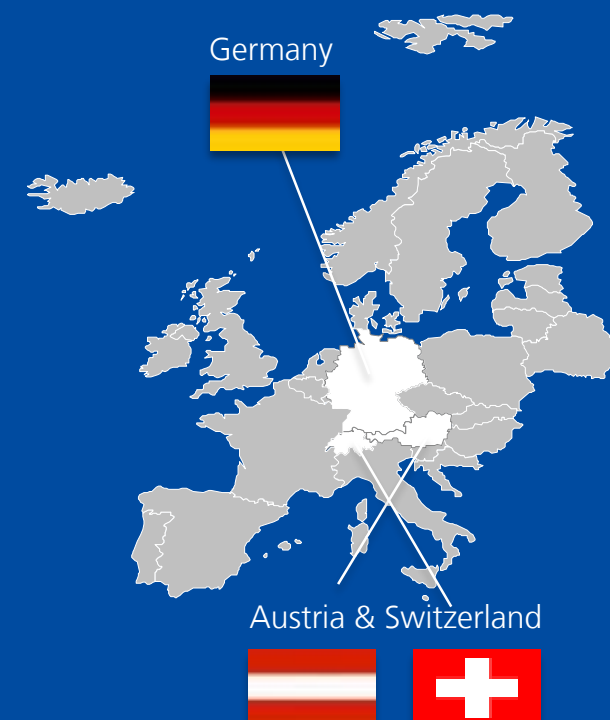
- Electrical installers
- EV charging specialists
- Pure solar installers
- HVAC companies
- Construction companies
- Roofers
- Other

The sample was selected from EUPD Research's extensive address database of EV charging station installers.

This database is constantly being updated and expanded. Only installers who have installed EV charging stations in 2023 in their domestic country market are being considered for the survey.

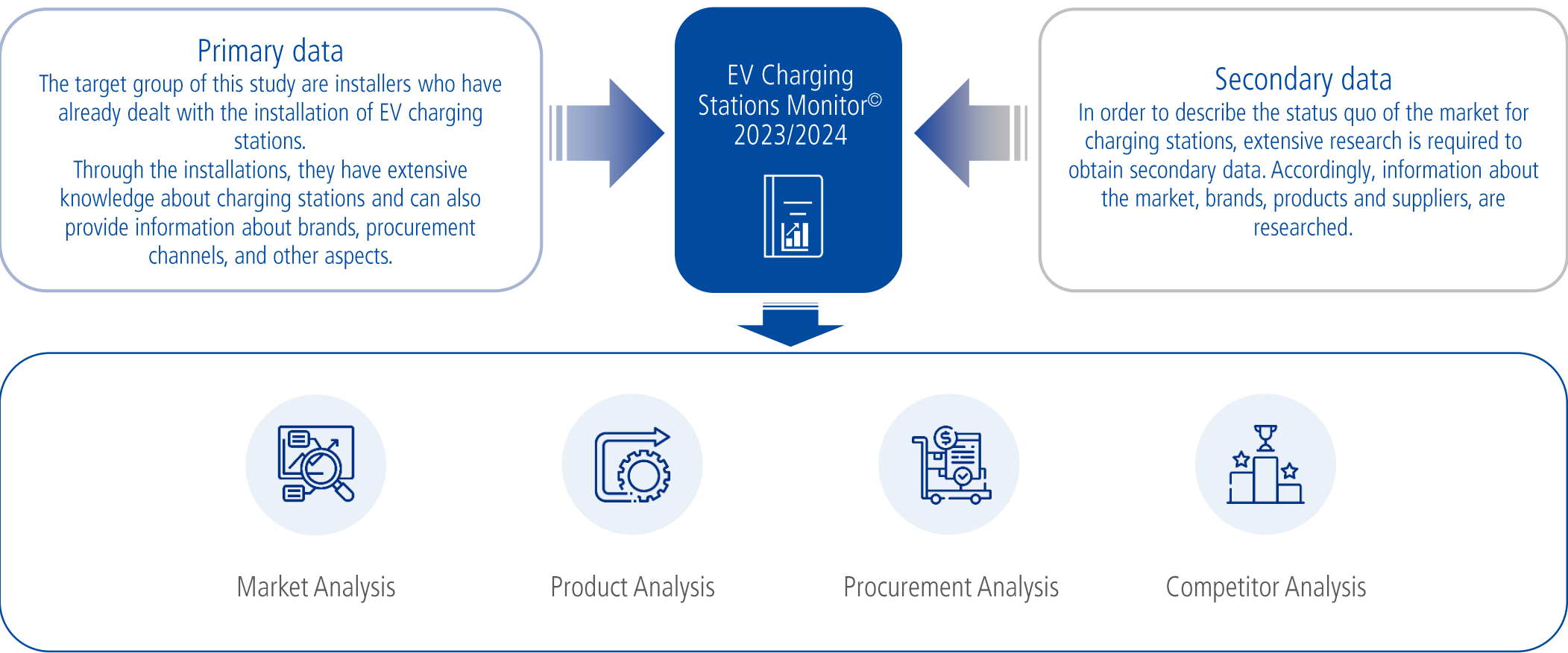


Countries of survey



Primary and Secondary Data

The scope of the study includes a survey of installers to obtain primary data, as well as extensive research to gather secondary data.



Study Content

Survey group	Installers of EV charging stations		
Technology	EV charging stations (focus on charging stations in private homes)		
Study content	Market background	Survey of EV charging station installers	Cross check: market players and solutions
	<ol style="list-style-type: none">1. Current market development2. Funding conditions3. Targets4. Solar charging5. Bi-directional charging	<ol style="list-style-type: none">1. Sample description2. Procurement management3. Brand management4. Sector coupling	<ol style="list-style-type: none">1. Brand profiles2. Charging station models and product features3. Compatibility checks

EV Charging Stations Monitor© 2023/2024



Example slides for the
EV Charging Stations Monitor© 2023/2024

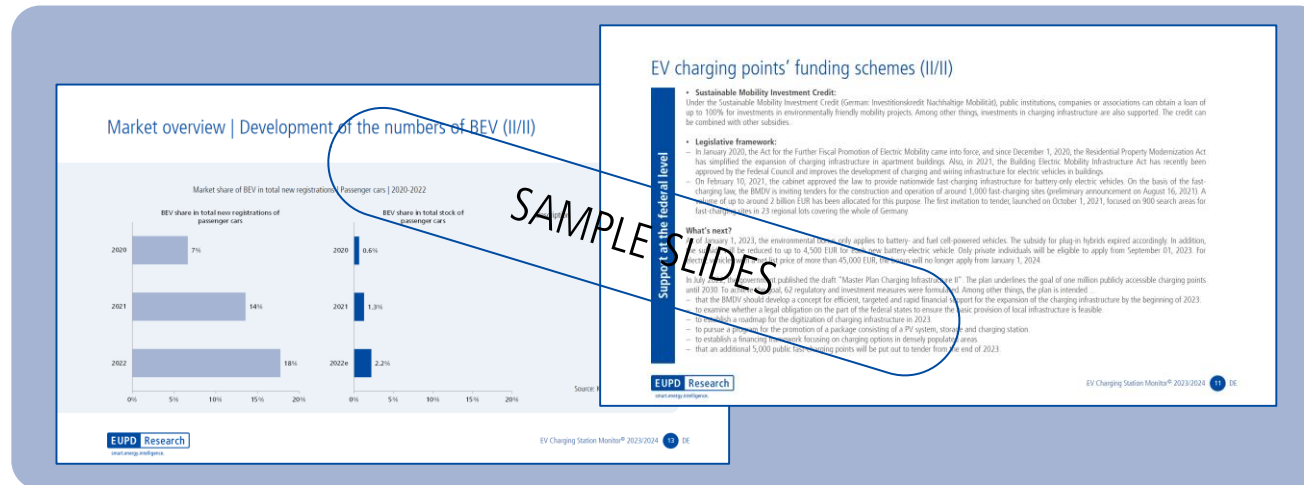
Market Background

The market background provides an overview of the electric mobility market based on secondary data and presents the most important subsidies and targets in the market. The contents include:

- Current market development
- Funding conditions
- Targets
- Solar charging
- Bi-directional charging

GAIN A BETTER UNDERSTANDING OF THE MARKET

- ✓ Get a compact market overview
- ✓ Understand market developments and trends
- ✓ Understand and monitor the legal and statutory framework
- ✓ Utilize the most important market data for your planning

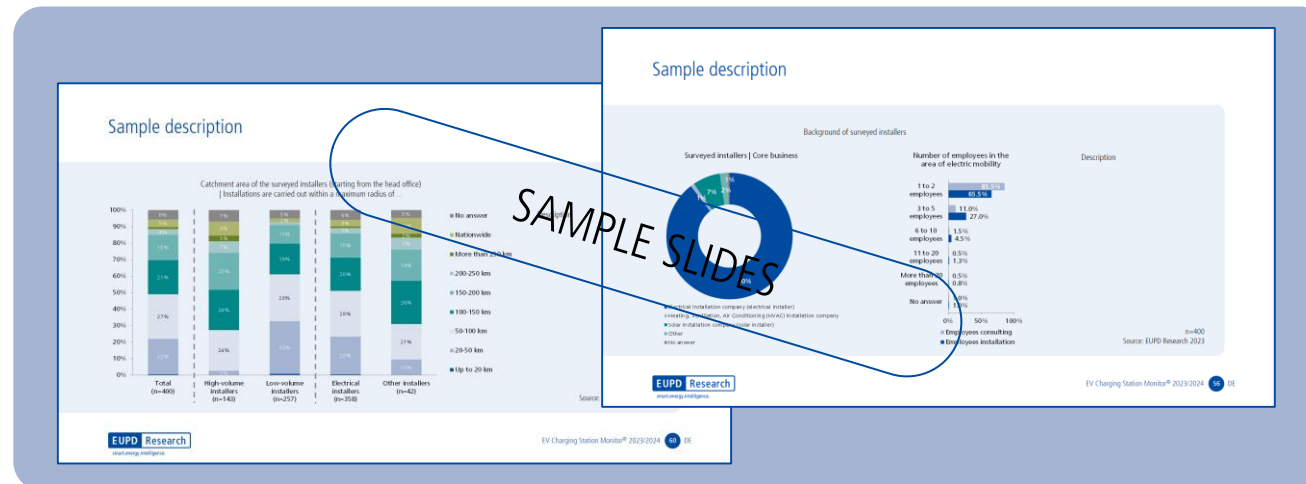


Sample Description

The sample description is an important part of the analysis and plays a crucial role in guaranteeing the accuracy and validity of the survey results. In this section we will describe the sample size and the demographic characteristics of the surveyed installers.

UNDERSTAND INSTALLERS

- ✓ Get to know the installers, find out how their companies are characterized and in which areas they operate
- ✓ Identify different target groups for your products



Procurement Management

Installers



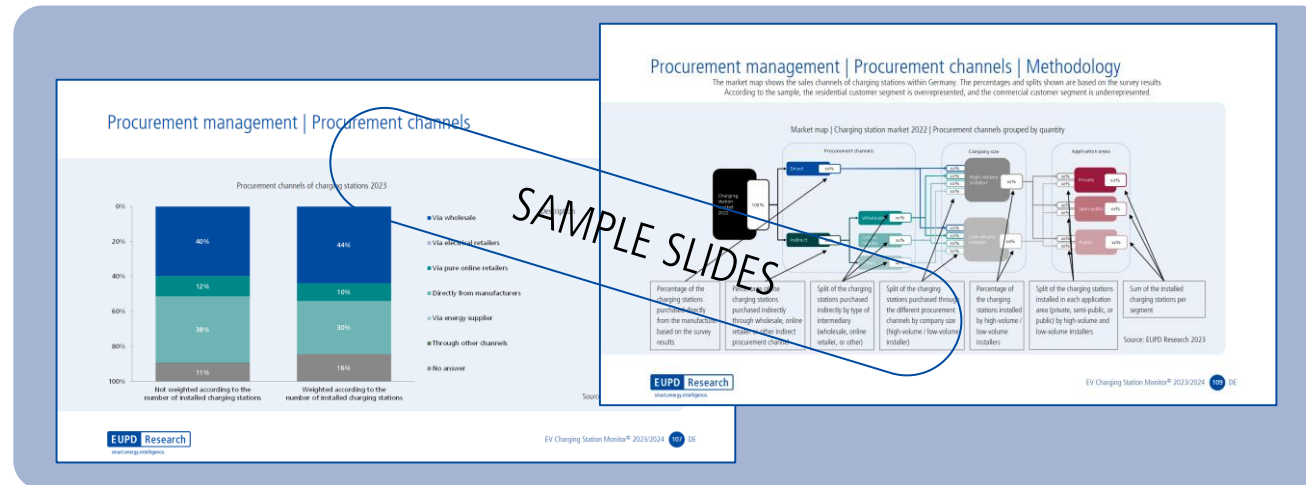
Sales
intermediaries

Procurement management addresses the supply chain that brings the EV charging stations from the manufacturer to the customer, distinguishing between a two-tier (direct purchase from the manufacturer) and a three-tier distribution approach (via wholesalers, energy suppliers, etc.).

The survey results cover information sources and procurement channels.

UNDERSTAND PROCUREMENT CHANNELS AND SALES MARKETS

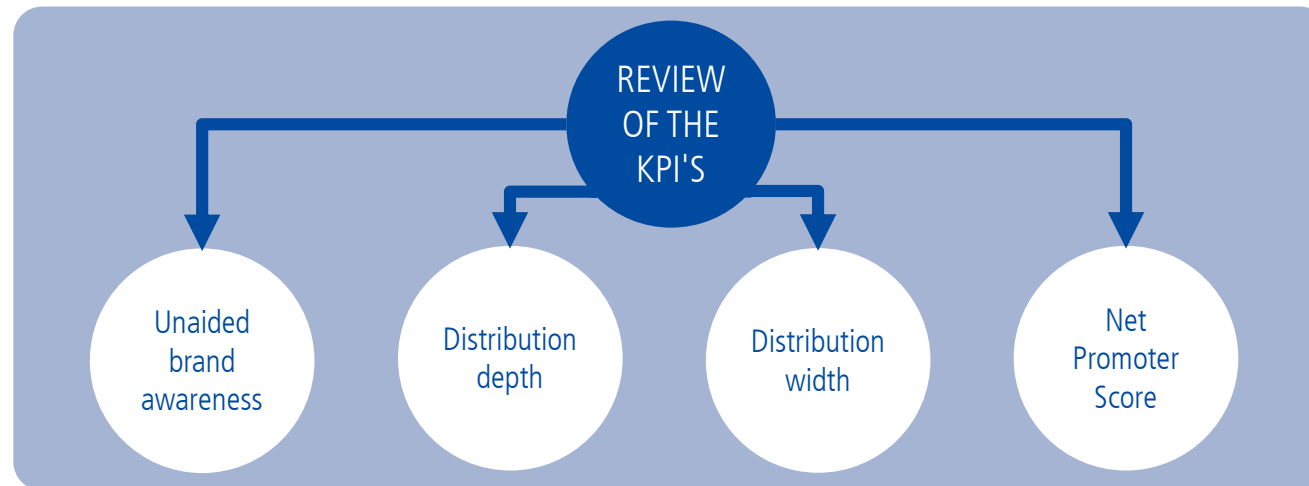
- ✓ Compare your own sales channels with those of the market
- ✓ Understand customer needs
- ✓ Improve your supply chain
- ✓ Improve your marketing strategies



Brand Management

This chapter allows for an in-depth analysis of the installers' portfolios and provides valuable information on the portfolio structures associated with specific brands. Especially in the private sector, installers decide which brands to install and recommend to their customers. Contents include:

- Unaided brand awareness
- Most frequent brands in installers' portfolios (distribution width)
- Exclusiveness of the brands in the installers' portfolios (distribution depth)
- Brand recommendation



Installers



Charging
station
manufacturers

UNDERSTAND INSTALLER PORTFOLIOS

- ✓ Measure the percentage of installers who buy your products and solutions
- ✓ Analyse how exclusively your brand is positioned in installers' portfolios
- ✓ Find out if you are a first choice or a replaceable filler
- ✓ Follow the path and development from a rarely-bought niche product to a frequently-demanded brand dominating the portfolios of installers
- ✓ Optimize brand communication and positioning

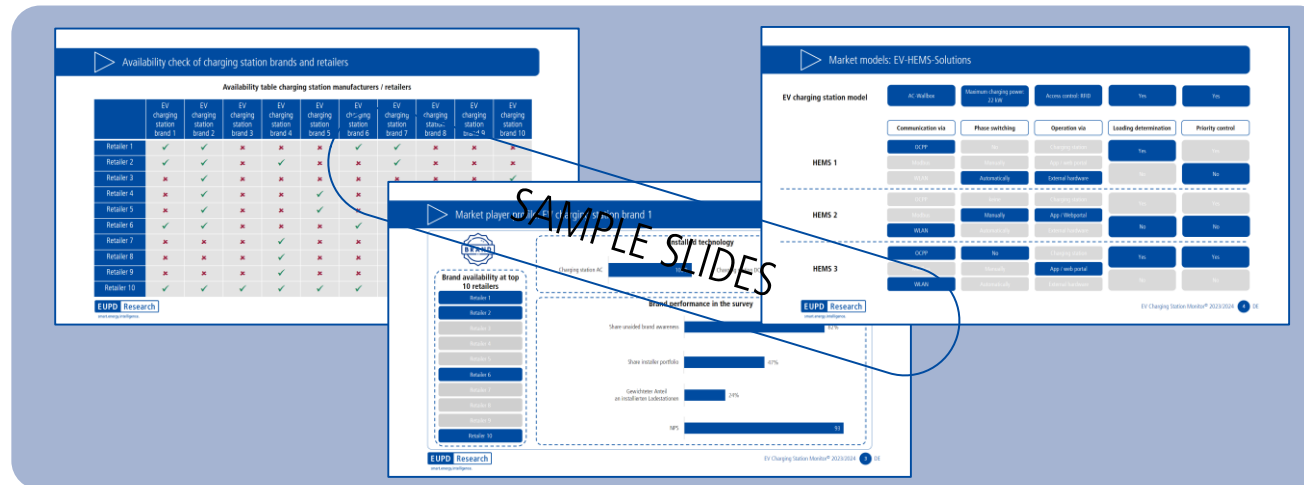
Cross Check: Market Players and Solutions

The overview of the market players examines the most important brands and presents their profiles. The TOP brands for private EV charging stations are selected based on the survey results about the brands included in installers' portfolios. The details of the chapter include:

- Compatibility check of charging station brands and distributors
- Compatibility check of charging station brands and energy management systems
- Brand profiles
- Charging station models and product features

KNOW YOUR COMPETITORS

- ✓ Identify and compare market competitors
- ✓ Understand the brand and product portfolios
- ✓ Understand the solutions of EV charging stations in combination with energy management systems



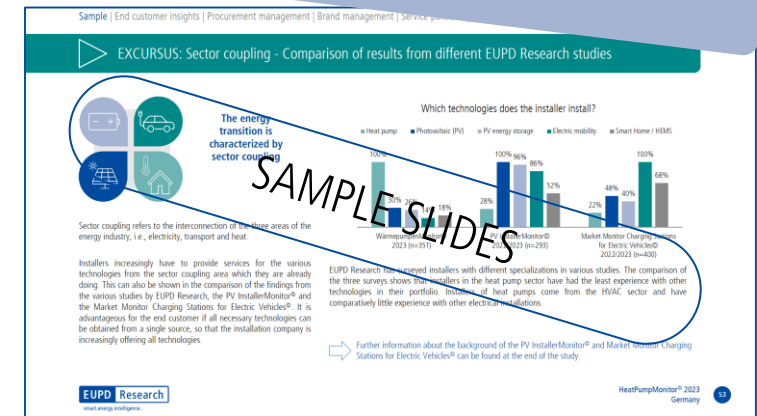
Additional Benefits | Excursions

A special feature of the study is the additional knowledge, which is composed of **comparative study results from EUPD Research**.

The results of the EV Charging Stations Monitor® are compared with the results of EUPD Research surveys of PV installers and heat pump installers or with end customers' responses. The presentation includes comparisons with the following EUPD Research studies:

- PV InstallerMonitor®
- HeatPumpMonitor®
- SolarProsumerMonitor®

Comparisons of study results
from EUPD Research



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Market Research

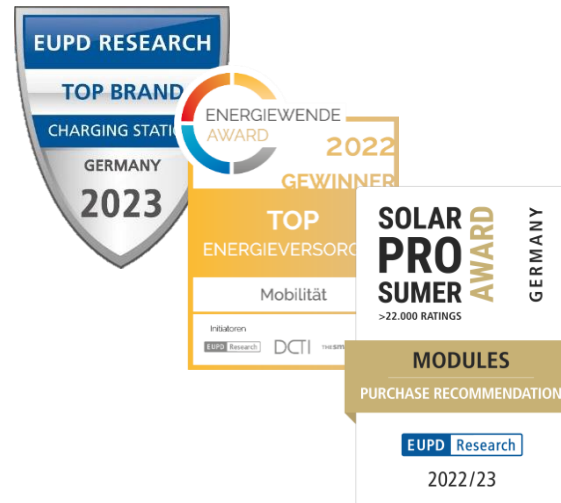
- Market Analyses
- Competition Analyses
- Product Analyses
- Price Analyses



EUPD Cert

Certification

- SolarProsumerAward®
- Top Brand PV® | Top PV Supplier®
- Energiewende Award®
- Customer Satisfaction



EUPD Consult

Exclusive Consulting

- Strategy consulting
- Within the scope of strategic consulting projects, we focus on the review, further development or redevelopment of the company's orientation, we rethink concepts, measures or the positioning within the competitive environment and shape growth paths and business models
- Our future-oriented consulting services analyze both the corporate environment and the fundamental objectives of the client

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