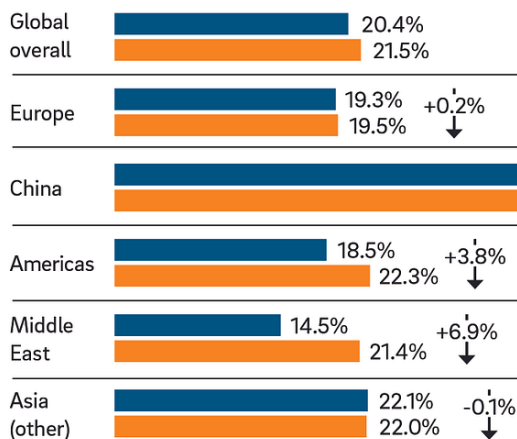
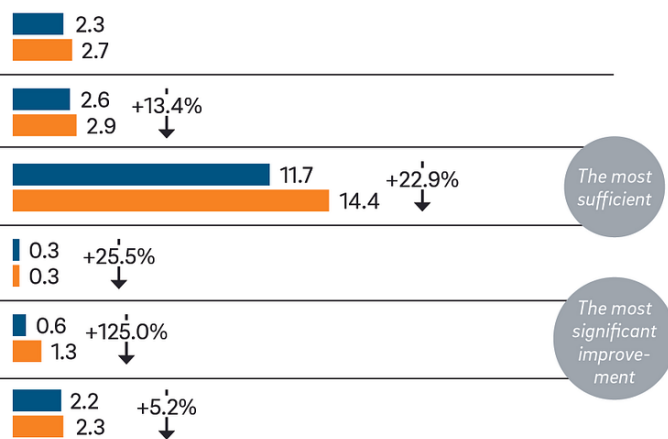


Powering ahead: All regions saw growth in fast DC charging share and density in 2022, with China leading the way

DC SHARE OF PUBLIC CHARGING INFRASTRUCTURE [% , 2022 H1 to H2]



DC CHARGER DENSITY – # OF DC CHARGERS PER 100 KM ROADWAYS [% , 2022 H1 to H2]



The most sufficient

The most significant improvement

■ 2022 H1 ■ 2022 H2

Source EV Volumes; desk research; Roland Berger

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Record levels of electric mobility: 2022 saw more electric cars sold worldwide than ever before

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- The share of electric cars in new registrations rose to 15% in 2022 and will exceed 50% by 2030
- Altogether 90% of electric car drivers depend on public charging stations – charging network expansion is picking up speed in Europe and in North and South America
- Germany ranks second as one of the top performers in the overall

analysis. China tops the rankings once again

Munich, July 2023 – After a slight dip in the share of electric cars sold globally in the first half of 2022, sales started to pick up again in the second half of the year, partly due to lower electricity prices, before reaching a new record high of 15% of the total market by the end of 2022. Electric car sales were highest in China, followed by Europe and the Middle East. More than half of all cars sold are expected to be electric vehicles by 2030. Countries also made good progress in expanding their charging infrastructure last year. Fast chargers now make up more than a fifth of the public charging infrastructure worldwide. Fully 83% of electric car owners said that public charging networks were more convenient to use and easier to access in the second half of the year than in the first half of 2022 (67%). However, automakers (OEMs) were pursuing different charging strategies depending on the region concerned. These are the key findings of Roland Berger's fourth "EV Charging Index 2023" based on extensive industry interviews and a survey of 16,000 respondents from Europe, Asia, North and South America, and the Middle East.

"The market for electric vehicles and charging stations is undergoing a transformation. Awareness of sustainable mobility is growing, and electric vehicles are finding increasing acceptance among consumers," says Ron Zheng, Partner at Roland Berger. "However, the market's further development depends on closer collaboration between automakers, energy companies and other industry players, both in the nationwide expansion of charging infrastructure and in innovative solutions to meet the growing demands. This will be essential to drive electric mobility forward and create a sustainable future."

Germany consolidates its position in the global electric vehicle market
China again took pole position in the index ranking. Germany was able to close the gap and take second place. The other countries making up the top 5 were the United States, the Netherlands and Norway. Germany's stronger market position compared with the last index is partly the result of the country's increased sales of electric vehicles. In addition, Germany and the other top 5 countries made considerable progress in developing a nationwide charging infrastructure. This is an important development, given that as many as 90% of electric car owners say they rely on public charging stations. More than 30% even use public charging stations three or more times a week. The workplace remains the most popular place for people to charge their car. Electric car drivers in Asia are not satisfied with the charging network – 70%

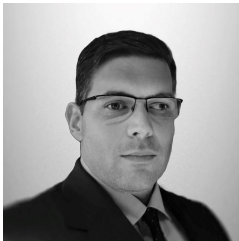
of them experience range anxiety.

Car manufacturers take different approaches to charging infrastructure. OEMs' charging infrastructure strategies vary by region. While OEMs in the USA see standardization of charging technology as the main driver for accelerating electric mobility, Chinese automakers are focusing on individual charging offerings under their separate brands.

"OEMs have a crucial role to play in electric mobility and in charging infrastructure development," says Tim Longstaff, Partner at Roland Berger. "With their engagement, partly in cooperation with partners from the energy industry, they are helping to ensure the steady growth of the charging network. Their products and solutions are an important step towards a sustainable and emission-free future."

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