

# Electric Vehicle Supply Equipment Market

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## Abstracts

### REPORT SCOPE:

As the world's embrace of electric vehicles (EVs) is expanding, the charging systems necessary for the support of these vehicles are expanding through a variety of market drivers. The term "electric vehicle" in this report includes commercial approaches such as pure battery-powered electric vehicle (BEV), plug-in hybrid electric vehicle (PHEV) and range-extended electric vehicle (REEV). Collectively, these EVs are termed plug-in electric vehicles (PEVs). Vehicles that use a combination of electric and internal combustion but without a charging port are termed hybrid electric vehicle (HEV) but are not included in this report. Only vehicles that employ a means for an external charge connection are considered.

Electric buses and other large electric vehicles are growing segments of their respective markets. However, charging systems are not considered in the market evaluation for this report. While electric buses are commercially available, larger heavy-duty vehicles are still under development. The associated charging systems are typically unique to the vehicle or their application. Some aspects of these charging systems are included in this report as background information. The market evaluation for these charging systems can best be evaluated with the vehicles themselves.

Some electric vehicles may be charged using a simple extension cord from a typical wall circuit; those are not included in this report. Only on-road vehicles are considered. In other words, charging systems for all-terrain vehicles, neighborhood electric vehicles, golf carts, scooters or electric bikes and similar vehicles are not considered.

Some companies have developed battery-swapping operations; rather than the PEV driver recharging the PEV battery, the entire battery is exchanged for a fully charged battery. These companies then employ charging systems to recharge the battery while

off-board the vehicle. Such systems are not considered in this report.

Material handling equipment (e.g. fork trucks, air craft ground support equipment) may utilize electric motive power. Charging systems for this type of equipment are unique to these applications and typically do not cross over to the on-road PEV market. These charging systems are not included in this report.

This report details actual figures for 2013 and 2017 and compound annual growth rate (CAGR) projections for 2018 through 2023 for global and regional markets. Sales values are provided under consensus, optimistic and pessimistic scenarios. A discussion of emerging technologies describes the areas in which research is being performed and incentivized and their anticipated effects in future markets.

Note that values are expressed in millions of dollars, and shipments are expressed in 1,000 units. In both cases, totals are rounded to the nearest integer (i.e., less than \$500,000 is expressed as \$0). Values are based on the equivalent of retail, which is the price publicly advertised. While incentives exist for the private sale of PEVs, incentives to reduce the cost of charging systems are primarily restricted to those installed in public locations.

The equipment detailed in this report includes those that interface between the electric utility supplied power source and the PEV. Because these may or may not technically be “chargers,” as will be defined below, the term electric vehicle supply equipment (EVSE) is used. Differences in geographic markets also exist in part because the electricity is generated and supplied differently.

This report defines the differing technologies employed by EVSE suppliers and the related market sectors, identifies leading supplier companies and analyzes markets in differing geographic markets to provide a five-year forecast. Finally, the company profiles section provides the status of and recent events for companies providing EVSE.

## **REPORT INCLUDES:**

94 data tables and 81 additional tables

An overview of the global market for Electric Vehicle Supply Equipment (EVSE)

Analyses of global market trends, with data from 2017 to 2018, and projections of CAGRs through 2023

Country specific data and analysis for U.S., Canada, Netherlands, Germany, France, United Kingdom, Norway, Japan, China and Korea

Detailed description of function and design of EVSE supporting Plug-in Hybrid Electric Vehicle (PHEV) and features and benefits of EVSE types

A look into issues and costs associated with EVSE installations

Explanation of the major drivers and regional dynamics of the market and current trends within the industry

Company profiles of major players in the industry, including Clipper Creek, EV Box, Bosch, LiquidSky, Greenlots and Chargepoint

## Contents

### **CHAPTER 1 INTRODUCTION**

Study Goals and Objectives  
Reasons for Doing This Study  
Scope of Report  
Intended Audience  
Information Sources  
Methodology  
Geographic Breakdown  
Analyst's Credentials  
BCC Custom Research  
Related BCC Research Report

### **CHAPTER 2 SUMMARY AND HIGHLIGHTS**

### **CHAPTER 3 MARKET AND TECHNOLOGY BACKGROUND**

General Background  
Vehicles and Batteries  
Recharge Characteristics  
Charging Locations  
Connectors and Plugs  
AC Connectors  
Inductive Charging Connections  
DC Connectors  
Tesla Connectors  
Communications Protocols  
High-Power DC (Extreme Fast Charging) Connections  
Charging Infrastructure  
PEV Range  
Design Development of EVSE  
Standards Development  
Communications and Networks  
EVSE Installation Costs  
Residential EVSE Installation Planning  
Trends in the PEV Market  
Passenger Vehicles

## **CHAPTER 4 MARKET BREAKDOWN BY TECHNOLOGY TYPE**

Electric Vehicle Supply Equipment Market by Technology

EVSE Type

Technology

EVSE Basic Charging Equipment Market Summary

Basic Charging Equipment

Basic Charging Equipment Market Drivers

Basic Charging Equipment Market Scenarios

Smart Charging EVSE Market Summary

Residential Smart EVSE

Smart EVSE at the Workplace

Fleet Applications for Smart EVSE

Publicly Accessible Smart EVSE

DC Fast Chargers

Smart Charging Cyber Security

Market Drivers for Smart Charging Equipment

Smart Charging Equipment Market Scenarios

EVSE with Electric Utility Interface Market Summary

Time of Use

Demand Response

Real-Time Pricing

Clustering

Storage-Assisted Recharging

Market Scenarios for EVSE with Electric Utility Interface

Market Summary for EVSE with Bi-directional Power Capability

Vehicle to Home (V2H)

Vehicle to Business (V2B)

Vehicle to Grid (V2G)

Challenges with V2G

## **CHAPTER 5 MARKET BREAKDOWN BY END USER**

EVSE Private PEV Owner Market Summary

Residential PEV Owner Market Scenarios

EVSE Fleet Owner Market Summary

Fleet Owner Market Scenarios

EVSE Workplace Employer Market Summary

Workplace Employer Market Scenarios  
EVSE Charging Station Host Market Summary  
Charging Station Host Market Scenarios  
Market Summary for EVSE Providers  
EVSE Electric Utility Owner Market Summary

## **CHAPTER 6 MARKET BREAKDOWN BY APPLICATION**

EVSE Residential Charging Market Summary  
Residential Charging Market Scenarios  
EVSE Multi-Unit Dwelling Charging Market Summary  
EVSE Workplace Charging Market Summary  
EVSE Fleet Owner Market Summary  
EVSE Public Charging Market Summary  
Public Charging Market Drivers  
North America  
Europe  
Asia  
Public Charging Market Scenarios

## **CHAPTER 7 MARKET BREAKDOWN BY REGION**

EVSE Industry Structure: Globalization  
North America: Canada and the United States  
Canada  
North American Market Drivers  
North American Charging Market Scenarios  
Europe: Western Europe  
Western European Market Drivers  
France  
Germany  
The Netherlands  
Norway  
United Kingdom  
European Charging Market Scenarios  
Asia: Japan and China  
China  
Japan  
Asian Market Drivers

Asian Charging Market Scenarios

## **CHAPTER 8 PATENT REVIEW/ NEW DEVELOPMENTS**

Patents Granted in 2018 by Company  
Review of EVSE Patents Granted by Subject

## **CHAPTER 9 ANALYSIS OF MARKET COMPANIES**

Major Market Trends

EVSE Suppliers and Market Players

EVSE Suppliers

ABB

ADDENERGIE

AEROVIRONMENT/WEBASTO CHARGING SYSTEMS/EV SOLUTIONS

ANDROMEDA

BLINK CHARGING CO. (CAR CHARGING GROUP)

BOSCH AUTOMOTIVE SERVICE SOLUTIONS INC.

BTC POWER (INNOGY)

CHARGEMASTER (BP CHARGEMASTER)

CHARGEPOINT

CIRCONTROL

CLIPPER CREEK

CORITECH

DELTA

ECOTAP

EMOTORWERKS

EVBOX

EVGO

EVTRONIC (EVBOX)

INNOGY

PLUGLESS POWER

SETEC (SHENZHEN)

SIEMENS

WITRICITY

ZAPTEC

EV Network Providers

ABB

ALLEGO

BEAM  
BLINK CHARGING CO. (CAR CHARGING GROUP)  
CHARGEMASTER (BP CHARGEMASTER)  
CHARGEPOINT  
CIRCONTROL  
CORITECH  
DRIIVZ  
EMOTORWERKS  
GREENLOTS  
HUBJECT  
INNOGY  
STATE GRID CORP. OF CHINA  
ZAPTEC

## **CHAPTER 10 APPENDIX**

Acronyms  
Report Sources



## List Of Tables

### LIST OF TABLES

Summary Table: Global Market for Electric Vehicle Supply Equipment by Application (Consensus Scenario), by Type, Through 2023

Table 1: SAE J1772 Charging Levels

Table 2: IEC 61851 Charging Levels

Table 3: PEV Charge Times with Depleted Battery

Table 4: Challenges and Opportunities to Support

Table 5: Consensus, Optimistic and Pessimistic Passenger Vehicle Scenarios

Table 6: Global Passenger Electric Vehicle Market Volume for Consensus Scenario, by Configuration, Through 2023

Table 7: Global Passenger Electric Vehicle Market Volume for Optimistic Scenario, by Configuration, Through 2023

Table 8: Global Passenger Electric Vehicle Market Volume for Pessimistic Scenario, by Configuration, Through 2023

Table 9: Basic AC Level 1 Pedestal Providers

Table 10: Basic AC Level 2/Mode 2, 3 EVSE Providers

Table 11: Basic AC Level 2/Mode 2,3 Residential EVSE Pricing

Table 12: Basic AC Level 2 Commercial EVSE Pricing

Table 13: Basic Charging Equipment Market Drivers

Table 14: Consensus, Optimistic and Pessimistic Basic Charging Equipment Scenarios

Table 15: Global Market Volume for Basic EVSE for Consensus Scenario, by Type, Through 2023

Table 16: Global Market for Basic EVSE for Consensus Scenario, by Type, Through 2023

Table 17: Global Market Volume for Basic EVSE for Optimistic Scenario, by Type, Through 2023

Table 18: Global Market for Basic EVSE for Optimistic Scenario, by Type, Through 2023

Table 19: Global Market Volume for Basic EVSE for Pessimistic Scenario, by Type, Through 2023

Table 20: Global Market for Basic EVSE for Pessimistic Scenario, by Type, Through 2023

Table 21: Smart AC Level 2 EVSE Providers

Table 22: Smart AC Level 2 Residential EVSE Pricing

Table 23: Smart AC Level 2 Commercial EVSE Pricing

Table 24: DC Fast Charge Providers

Table 25: Smart DC Fast Charging EVSE Pricing

Table 26: Market Drivers for Smart Charging Equipment

Table 27: Consensus, Optimistic and Pessimistic Smart Charging Equipment Scenarios

Table 28: Global Market Volume for Smart EVSE for Consensus Scenario, by Type, Through 2023

Table 29: Global Market for Smart EVSE for Consensus Scenario, by Type, Through 2023

Table 30: Global Market Volume for Smart EVSE for Optimistic Scenario, by Type, Through 2023

Table 31: Global Market for Smart EVSE for Optimistic Scenario, by Type, Through 2023

Table 32: Global Market Volume for Smart EVSE for Pessimistic Scenario, by Type, Through 2023

Table 33: Global Market for Smart EVSE for Pessimistic Scenario, by Type, Through 2023

Table 34: Market Drivers for EVSE with Electric Utility Interface

Table 35: Consensus, Optimistic and Pessimistic Scenarios for EVSE with Electric Utility Interface

Table 36: Global Market Volume for EVSE with Electric Utility Interface for Consensus Scenario, by Type, Through 2023

Table 37: Global Market for EVSE with Electric Utility Interface for Consensus Scenario, by Type, Through 2023

Table 38: Global Market Volume for EVSE with Electric Utility Interface for Optimistic Scenario, by Type, Through 2023

Table 39: Global Market for EVSE with Electric Utility Interface for Optimistic Scenario, by Type, Through 2023

Table 40: Global Market Volume for EVSE with Electric Utility Interface for Pessimistic Scenario, by Type, Through 2023

Table 41: Global Market for EVSE with Electric Utility Interface for Pessimistic Scenario, by Type, Through 2023

Table 42: Manufacturers of Bi-directional Power Flow EVSE

Table 43: Market Drivers for EVSE: Private PEV Owners

Table 44: Consensus, Optimistic and Pessimistic Residential PEV Owner Market Scenarios

Table 45: Global EVSE Market Volume for Private PEV Owner for Consensus Scenario, by Type, Through 2023

Table 46: Global EVSE Market for Private PEV Owner for Consensus Scenario, by Type, Through 2023

Table 47: Global EVSE Market Volume for Private PEV Owner for Optimistic Scenario,

by Type, Through 2023

Table 48: Global EVSE Market for Private PEV Owner for Optimistic Scenario, by Type, Through 2023

Table 49: Global EVSE Market Volume for Private PEV Owner for Pessimistic Scenario, by Type, Through 2023

Table 50: Global EVSE Market for Private PEV Owner for Pessimistic Scenario, by Type, Through 2023

Table 51: Market Drivers for EVSE: Fleet Owners

Table 52: Consensus, Optimistic and Pessimistic Fleet Owner/Workplace Employer Market Scenarios

Table 53: Global EVSE Market Volume for Fleet Owner for Consensus Scenario, by Type, Through 2023

Table 54: Global EVSE Market for Fleet Owner for Consensus Scenario, by Type, Through 2023

Table 55: Global EVSE Market Volume for Fleet Owner for Optimistic Scenario, by Type, Through 2023

Table 56: Global EVSE Market for Fleet Owner for Optimistic Scenario, by Type, Through 2023

Table 57: Global EVSE Market Volume for Fleet Owner for Pessimistic Scenario, by Type, Through 2023

Table 58: Global EVSE Market for Fleet Owner for Pessimistic Scenario, by Type, Through 2023

Table 59: Market Drivers for EVSE: Workplace Employer

Table 60: Consensus, Optimistic and Pessimistic Workplace Employer Market Scenarios

Table 61: Global EVSE Market Volume for Workplace Employer for Consensus Scenario, by Type, Through 2023

Table 62: Global EVSE Market for Workplace Employer for Consensus Scenario, by Type, Through 2023

Table 63: Global EVSE Market Volume for Workplace Employer for Optimistic Scenario, by Type, Through 2023

Table 64: Global EVSE Market for Workplace Employer for Optimistic Scenario, by Type, Through 2023

Table 65: Global EVSE Market Volume for Workplace Employer for Pessimistic Scenario, by Type, Through 2023

Table 66: Global EVSE Market for Workplace Employer for Pessimistic Scenario, by Type, Through 2023

Table 67: Market Drivers for EVSE: Charging Station Host

Table 68: Consensus, Optimistic and Pessimistic Charging Station Host Market

## Scenarios

Table 69: Global EVSE Market Volume for Charging Station Host for Consensus Scenario, by Type, Through 2023

Table 70: Global EVSE Market for Charging Station Host for Consensus Scenario, by Type, Through 2023

Table 71: Global EVSE Market Volume for Charging Station Host for Optimistic Scenario, by Type, Through 2023

Table 72: Global EVSE Market for Charging Station Host for Optimistic Scenario, by Type, Through 2023

Table 73: Global EVSE Market Volume for Charging Station Host for Pessimistic Scenario, by Type, Through 2023

Table 74: Global EVSE Market for Charging Station Host for Pessimistic Scenario, by Type, Through 2023

Table 75: Charging Station Network Providers

Table 76: North American Network Providers for AC Level 1 Public Charging

Table 77: North American Network Providers for AC Level 2 Public Charging

Table 78: North American Network Providers for DC Fast Charge Public Charging

Table 79: Most Popular Residential Charging Stations in 2018

Table 80: Market Drivers for EVSE Residential Charging

Table 81: Consensus, Optimistic and Pessimistic Residential Charging Market Scenarios

Table 82: Global EVSE Market Volume for Residential Charging for Consensus Scenario, by Type, Through 2023

Table 83: Global EVSE Market for Residential Charging for Consensus Scenario, by Type, Through 2023

Table 84: Global EVSE Market Volume for Residential Charging for Optimistic Scenario, by Type, Through 2023

Table 85: Global EVSE Market for Residential Charging for Optimistic Scenario, by Type, Through 2023

Table 86: Global EVSE Market Volume for Residential Charging for Pessimistic Scenario, by Type, Through 2023

Table 87: Global EVSE Market for Residential Charging for Pessimistic Scenario, by Type, Through 2023

Table 88: Global EVSE Market Volume for Multi-Unit Charging for Consensus Scenario, by Type, Through 2023

Table 89: Global EVSE Market for Multi-Unit Charging for Consensus Scenario, by Type, Through 2023

Table 90: Global EVSE Market Volume for Multi-Unit Charging for Optimistic Scenario, by Type, Through 2023

Table 91: Global EVSE Market for Multi-Unit Charging for Optimistic Scenario, by Type, Through 2023

Table 92: Global EVSE Market Volume for Multi-Unit Charging for Pessimistic Scenario, by Type, Through 2023

Table 93: Global EVSE Market for Multi-Unit Charging for Pessimistic Scenario, by Type, Through 2023

Table 94: Global EVSE Market Volume for Workplace Charging for Consensus Scenario, by Type, Through 2023

Table 95: Global EVSE Market for Workplace Charging for Consensus Scenario, by Type, Through 2023

Table 96: Global EVSE Market Volume for Workplace Charging for Optimistic Scenario, by Type, Through 2023

Table 97: Global EVSE Market for Workplace Charging for Optimistic Scenario, by Type, Through 2023

Table 98: Global EVSE Market Volume for Workplace Charging for Pessimistic Scenario, by Type, Through 2023

Table 99: Global EVSE Market for Workplace Charging for Pessimistic Scenario, by Type, Through 2023

Table 100: Global EVSE Market Volume for Fleet Charging for Consensus Scenario, by Type, Through 2023

Table 101: Global EVSE Market for Fleet Charging for Consensus Scenario, by Type, Through 2023

Table 102: Global EVSE Market Volume for Fleet Charging for Optimistic Scenario, by Type, Through 2023

Table 103: Global EVSE Market for Fleet Charging for Optimistic Scenario, by Type, Through 2023

Table 104: Global EVSE Market Volume for Fleet Charging for Pessimistic Scenario, by Type, Through 2023

Table 105: Global EVSE Market for Fleet Charging for Pessimistic Scenario, by Type, Through 2023

Table 106: Market Drivers for EVSE Public Charging

Table 107: Consensus, Optimistic and Pessimistic Public Charging Market Scenarios

Table 108: Global EVSE Market Volume for Public Charging for Consensus Scenario, by Type, Through 2023

Table 109: Global EVSE Market for Public Charging for Consensus Scenario, by Type, Through 2023

Table 110: Global EVSE Market Volume for Public Charging for Optimistic Scenario, by Type, Through 2023

Table 111: Global EVSE Market for Public Charging for Optimistic Scenario, by Type,



Through 2023

Table 112: Global EVSE Market Volume for Public Charging for Pessimistic Scenario, by Type, Through 2023

Table 113: Global EVSE Market for Public Charging for Pessimistic Scenario, by Type, Through 2023

Table 114: Publicly Accessible Electric Vehicle Charging Stations, by State

Table 115: EVSE Laws and Incentives, by State

Table 116: EVSE Laws and Incentives, by Province

Table 117: North American Market Drivers for EVSE

Table 118: Consensus, Optimistic and Pessimistic North American Charging Market Scenarios

Table 119: North American Market Volume for Consensus Scenario, by Type, Through 2023

Table 120: North American Market for Consensus Scenario, by Type, Through 2023

Table 121: North American Market Volume for Optimistic Scenario, by Type, Through 2023

Table 122: North American Market for Optimistic Scenario, by Type, Through 2023

Table 123: North American Market Volume for Pessimistic Scenario, by Type, Through 2023

Table 124: North American Market for Pessimistic Scenario, by Type, Through 2023

Table 125: Western European Market Drivers for EVSE

Table 126: Western European Incentives

Table 127: Consensus, Optimistic and Pessimistic European Charging Market Scenarios

Table 128: European EVSE Market Volume for Consensus Scenario, by Type, Through 2023

Table 129: European EVSE Market for Consensus Scenario, by Type, Through 2023

Table 130: European EVSE Market Volume for Optimistic Scenario, by Type, Through 2023

Table 131: European EVSE Market for Optimistic Scenario, by Type, Through 2023

Table 132: European EVSE Market Volume for Pessimistic Scenario, by Type, Through 2023

Table 133: European EVSE Market for Pessimistic Scenario, by Type, Through 2023

Table 134: Asian Market Drivers for EVSE

Table 135: Consensus, Optimistic and Pessimistic Asian Charging Market Scenarios

Table 136: Asian Market Volume for Consensus Scenario, by Type, Through 2023

Table 137: Asian Market for Consensus Scenario, by Type, Through 2023

Table 138: Asian Market Volume for Optimistic Scenario, by Type, Through 2023

Table 139: Asian Market for Optimistic Scenario, by Type, Through 2023

Table 140: Asian Market Volume for Pessimistic Scenario, by Type, Through 2023

Table 141: Asian Market for Pessimistic Scenario, by Type, Through 2023

Table 142: Review of EVSE Related Patents Granted in 2018

Table 143: EVSE Patents Granted, by Subject

Table 144: Review of EVSE-Related Patent Applications, 2018

Table 145: EVSE Patent Application, by Subject

Table 146: AC Level 1, 2 and Mode 2, 3 EVSE Suppliers

Table 147: DC Fast Charger Suppliers

Table 148: EVSE Network Providers

Table 149: ABB: EVSE Products

Table 150: AddEnergie: EVSE Products

Table 151: EV Solutions: EVSE Products

Table 152: Andromeda: EVSE Products

Table 153: Blink: EVSE Products

Table 154: Bosch: EVSE Products

Table 155: BTC Power: EVSE Products

Table 156: Chargemaster: EVSE Products

Table 157: ChargePoint: EVSE Products

Table 158: Circontrol: EVSE Products

Table 159: Clipper Creek: EVSE Products

Table 160: Coritech: EVSE Products

Table 161: Delta: EVSE Products

Table 162: Ecotap: EVSE Products

Table 163: eMotorWerks: EVSE Products

Table 164: EVBOX: EVSE Products

Table 165: EVGo: EVSE Products

Table 166: EVTronic: EVSE Products

Table 167: Innogy: EVSE Products

Table 168: Plugless Power: EVSE Products

Table 169: Setec Power: EVSE Products

Table 170: Siemens: EVSE Products

Table 171: WiTricity: EVSE Products

Table 172: Zaptec: EVSE Products

Table 173: Acronyms Used in the Electric Vehicle Supply Equipment Market

Table 174: Report Sources

## List Of Figures

### LIST OF FIGURES

Summary Figure: Global Market for Electric Vehicle Supply Equipment by Application (Consensus Scenario), by Type, 2017-2023

Figure 1: EVSE Configurations

Figure 2: AC Level 1 and 2 (Type 1) Connector Standard

Figure 3: AC Type 2 Standard

Figure 4: AC GB/T 20234.2 Standard Connector

Figure 5: AC Standard Connectors

Figure 6: Charge Cord Management

Figure 7: Public EVSE Configurations

Figure 8: Removable Cable Design

Figure 9: Type 1 to Type 2 EV Adapter

Figure 10: Inductive Charging Technology

Figure 11: Inductive Charging Example

Figure 12: CHAdeMO DC Connector Standard

Figure 13: PEV AC and DC Charge Inlets

Figure 14: SAE (Type 1) DC Connector Standard

Figure 15: Type 2 CCS DC Connector Standard

Figure 16: GB/T Standard DC Charging Connectors

Figure 17: C Charging Connectors

Figure 18: Tesla AC Connector

Figure 19: Tesla DC CHAdeMO Connector Adapter

Figure 20: Tesla Dual Connectors

Figure 21: EVgo and ABB

Figure 22: ChargePoint 2 MW Charging Connector

Figure 23: OppCharge J 3105 Overhead Charging System

Figure 24: Siemens J 3105 Overhead Charging System

Figure 25: Momentum Dynamics/CARTA Inductive Charging

Figure 26: Publicly Accessible EVSE with Advertising

Figure 27: Leading EVSE Locations in Europe

Figure 28: Blink DC Fast Charger

Figure 29: PEV Supplied Cordset

Figure 30: Workplace Charging Outlets

Figure 31: Workplace Basic Level 1 EVSE

Figure 32: Basic Level 1/2 Configurations

Figure 33: Basic Level 2 Workplace Configurations



Figure 34: Global Market for Basic Charging for Consensus Scenario, by Type, 2017-2023

Figure 35: Smart Home Products

Figure 36: Global Market for EVSE for Consensus Scenario, by Type, 2017-2023

Figure 37: Electric Utility Load Curve

Figure 38: Effects of Time of Use Rates on Residential Charging

Figure 39: Electric Utility Demand-Response Programs

Figure 40: Conceptual Design of Storage-Assisted Recharging

Figure 41: Global Market for EVSE with Electric Utility Interface for Consensus Scenario, by Type, 2017-2023

Figure 42: DC Fast Charger with Bi-Directional Power Flow

Figure 43: Honda Power Manager for V2H

Figure 44: Ancillary Services for V2G

Figure 45: Global EVSE Market for Private PEV Owners by Consensus Scenario, by Type, 2017-2023

Figure 46: Electric Terminal Truck

Figure 47: Global EVSE Market for Fleet Owner, by Consensus Scenario, by Type, 2017-2023

Figure 48: Cumulative Number of Partner Stations, 2010-2016

Figure 49: Number of Workplace Charging Station, by Type, Before June 2013 to After May 2016

Figure 50: Charging Frequency, by Location

Figure 51: Global EVSE Market for Workplace Employer for Consensus Scenario, by Type, 2017-2023

Figure 52: Global EVSE Market for Charging Site Hosts for Consensus Scenario, by Type, 2017-2023

Figure 53: Global EVSE Market for Residential Charging, by Type, 2017-2023

Figure 54: Streetlight Charging

Figure 55: Global EVSE Market for Multi-Unit Charging, by Type, 2017-2023

Figure 56: Global EVSE Market for Workplace Charging, by Type, 2017-2023

Figure 57: Global EVSE Market for Fleet Charging for Consensus Scenario, by Type, 2017-2023

Figure 58: Tesla Supercharger Network in North America

Figure 59: Non-Tesla DC Fast Charge Network in North America

Figure 60: Electrify America DC Fast Charge Network in the U.S.

Figure 61: Conceptual Design of Corridor DC Charging Complex

Figure 62: I-95 Corridor DC Charging Station

Figure 63: Tesla Supercharger Network in Europe

Figure 64: CHAdeMO Connector Locations in Europe

Figure 65: Tesla Supercharger Network in Asia

Figure 66: CHAdeMO Chargers in Asia

Figure 67: Public Quick Chargers in China

Figure 68: Global EVSE Market for Public Charging for Consensus Scenario, by Type, 2017-2023

Figure 69: U.S. Publicly Accessible Alternative Fuel Stations, by Fuel Type, 1992-2016

Figure 70: Canadian PEV

Figure 71: Canadian PEV Sales, 2013-2017

Figure 72: North American Market for Consensus Scenario, by Type, 2017-2023

Figure 73: Public Charging Infrastructure Market in Western Europe

Figure 74: Publicly Accessible Charging Positions: France, 2010-2018

Figure 75: Publicly Accessible Charging Positions: Germany, 2010-2018

Figure 76: Publicly Accessible Charging Positions: The Netherlands, 2010-2018

Figure 77: Publicly Accessible Charging Positions: Norway, 2010-2018

Figure 78: Publicly Accessible Charging Positions: United Kingdom, 2010-2018

Figure 79: European EVSE Market for Consensus Scenario, by Type, 2017-2023

Figure 80: Asian Market for Consensus Scenario, by Type, 2017-2023

Figure 81: Patents Granted, by Assignee, 2018

Figure 82: Share of Patents Granted, by Subject, 2018

Figure 83: EVSE Related Patents Granted and Applications, by Subject, 2018

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