

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



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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

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