

Electric Vehicle (EV) Charging Communication Unit Market - A Global and Regional Analysis: Focus on Vehicle Type, Propulsion Type, Charging Type, Current Type, Component Type, System Type, and Country-Level Analysis - Analysis and Forecast, 2023-2032

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Abstracts

Global EV Charging Communication Unit Market: Industry Overview

The global EV charging communication unit market was valued at \$124.9 million in 2022, which is expected to grow at a CAGR of 28.63% and reach 1,536.1 million by 2032. The market for EV charging communication units has grown rapidly in recent years, driven by the increasing adoption of electric vehicles, the need for fast and reliable charging solutions, and standardization and interoperability. The primary driver of the EV charging communication unit market is the escalating adoption of electric vehicles. Governments and regulatory bodies worldwide are actively promoting the transition to electric mobility through incentives, emissions reduction targets, and investments in charging infrastructure development. As a result, the number of EVs on the road is experiencing exponential growth, leading to a surge in demand for charging infrastructure, including communication units.

Market Lifecycle Stage

An EV charging communication unit (CCU) is a device that facilitates communication between an electric vehicle (EV) and a charging station. The CCU is responsible for sending and receiving data between the EV and the charging station, such as the EV's battery level, the charging rate, and the cost of the charging session. The CCU also

plays a role in ensuring the safety of the charging process. The CCU is typically located in the EV's charging port. It is a small electronic device that contains a microprocessor, memory, and communication ports. The CCU communicates with the charging station using a variety of protocols, such as the Open Charge Point Protocol (OCPP) and the ISO 15118 protocol. The CCU is an important part of the EV charging infrastructure. It helps to ensure that EV charging is safe, efficient, and convenient.

Impact of Global EV Charging Communication Unit Market

The global EV charging communication unit market is currently experiencing a substantial transformation owing to the rapid adoption of electric vehicles (EVs) on a global scale. This shift toward EVs by both consumers and businesses has led to a heightened demand for efficient and rapid charging solutions, thereby directly driving the market for EV charging communication units. Furthermore, the extensive development of charging infrastructure worldwide has emerged as a major growth driver, attracting significant investments and broadening the market's scope. Anticipated technological advancements, encompassing quicker charging speeds, improved connectivity, and standardized charging protocols, are poised to be instrumental in shaping the market. Supportive government policies, incentives, and grants that actively promote EV adoption and the development of charging infrastructure are crucial to this growth trajectory. Additionally, key trends such as the integration of smart charging solutions and their consequential impact on energy management are pivotal in defining the future landscape of the EV charging communication unit market.

Market Segmentation:

Segmentation 1: by Vehicle Type

Passenger Vehicle

Commercial Vehicle

The EV charging communication unit market is poised to be significantly influenced by the passenger vehicle segment in the foreseeable future. This trend is anticipated to maintain its momentum, fuelled by the escalating shift toward EVs as the preferred mode of daily transportation. The steady surge in EV registrations will consequently amplify the requirement for CCUs. Furthermore, the emergence of cutting-edge technologies, such as intelligent charging, is set to magnify the demand for CCUs.

Intelligent charging empowers EVs to recharge during periods of low grid demand, thereby alleviating stress on the grid. The gradual acceptance of electric passenger vehicles, attributed to factors such as heightened environmental consciousness, governmental incentives, and advancements in battery technology, is expected to boost the demand for associated charging infrastructure.

Segmentation 2: by Propulsion Type

Battery Electric Vehicle (BEV)

Plug-In Hybrid Electric Vehicle (PHEV)

The EV charging communication unit market is being dominated by battery electric vehicles (BEVs). This prevailing trend is driven by various factors that position BEVs at the forefront of the market. As the adoption of electric vehicles accelerates, BEVs take center stage due to their prominence in the EV landscape. Their pivotal role is underscored by advancements in battery technology, favorable government policies, and growing environmental consciousness, all of which contribute to their expanding market share. This leadership of BEVs in the electric vehicle charging communication unit market is projected to persist as the automotive industry witnesses a paradigm shift toward sustainable mobility solutions. The imperative to establish a robust charging infrastructure tailored to the unique requirements of BEVs further solidifies their position as torchbearers of the electric vehicle charging communication unit market.

Segmentation 3: by Charging Type

Wired (Plug-In)

Wireless (Inductive Charging)

In the EV charging communication unit market, wired (plug-in) solutions command the largest market share. This dominant share can be attributed to several factors that underscore the significance of wired charging solutions. As the EV market continues to expand, wired (plug-in) options have emerged as the primary choice due to their reliability, established infrastructure, and efficient charging capabilities. These solutions cater to a wide range of consumer needs, from home charging setups to public charging stations.

The prevalence of wired (plug-in) solutions in the EV charging communication unit market is expected to continue, driven by their established presence and the ongoing enhancement of their technology. While wireless charging solutions are also evolving, wired options remain a cornerstone of the charging landscape due to their proven track record and compatibility with existing infrastructure. This market dominance of wired (plug-in) solutions reflects their pivotal role in shaping the charging infrastructure of the electric vehicle ecosystem.

Segmentation 4: by Current Type

Alternating Current (AC)

Direct Current (DC)

Alternating current (AC) dominates the EV charging communication unit market. However, direct current (DC) is becoming increasingly popular, especially for fast-charging applications. AC is the most common type of electricity in the world, and it is also the most efficient way to transmit electricity over long distances. This makes it the preferred choice for EV charging infrastructure, as it allows for the installation of charging stations in more places. DC is more efficient for charging EVs, as it can deliver more power to the battery in a shorter amount of time. This makes it ideal for fast charging applications, such as charging at public stations or at work. However, DC is more expensive to install and operate than AC, which is why it is not as common. The prevalence of AC solutions in the electric vehicle charging communication unit market is expected to persist, driven by their established infrastructure and ongoing advancements in technology.

Segmentation 5: by Component Type

Software

Hardware

The EV charging communication unit market is dominated by hardware, which accounts for most of the cost of the unit. The hardware of a CCU includes the communication module, power converter, controller, and display. The software of a CCU is responsible

for encrypting and decrypting data between the EV and the charging station, managing the charging process, collecting and storing data about the charging process, and communicating with the EV's battery management system. The software of a CCU is typically developed by the manufacturer of the CCU, while the hardware is typically sourced from third-party suppliers.

Segmentation 6: by System Type

Electric Vehicle Communication Controller (EVCC)

Supply Equipment Communication Controller (SECC)

Electric vehicle communication controller (EVCC) is expected to be dominant in the EV charging communication unit market. As the electric vehicle (EV) sector experiences ongoing growth, the EVCC has become a central element due to its essential function in facilitating communication and data interchange between EVs and charging infrastructure. This technology plays a critical role in optimizing charging management, enabling secure authentication, facilitating billing processes, and potentially supporting vehicle-to-grid (V2G) integration. The projected ascendancy of the EVCC within the electric vehicle charging communication unit market is rooted in its vital contribution to the seamless functioning of charging networks. With the rising adoption of EVs and the increasing complexity of charging infrastructure, the role of the EVCC has become important. Its capacity to facilitate intelligent charging strategies, ensure interoperability, and establish standardized communication protocols positions it as a crucial linchpin for the future evolution of EV charging ecosystems.

Segmentation 7: by Region

North America

Europe

U.K.

China

Asia-Pacific and Japan

Rest-of-the-World

China currently holds the largest share of the global EV charging communication unit market. The country has been a leader in the production and adoption of electric vehicles (EVs) and the associated charging infrastructure. China's rapid economic development, government policies promoting electric mobility, and a strong focus on reducing emissions have all contributed to its dominant position in the global EV market. The China EV charging communication unit market is expected to continue to grow rapidly in the coming years. This is due to the continued support of the Chinese government, the growth of the Chinese EV market, and the presence of key players. Other countries that are expected to play a major role in the global EV charging communication unit market in the coming years include the U.S., Germany, Japan, and South Korea. These countries are also investing heavily in the development of the EV industry and EV charging infrastructure.

Recent Developments in the Global EV Charging Communication Unit Market

In January 2022, a smart charging robot developed by Continental Engineering Services (CES) would make future electric vehicle fill-ups much simpler and more practical.

In March 2021, Dana Limited announced the acquisition of Pi Innovo LLC, a leading provider of embedded software solutions and electronic control units for the light vehicle, commercial vehicle, and off-highway markets. Dana previously owned a non-controlling stake in the company.

In April 2023, LG Innotek announced the successful development of a '5G-V2X Cellular Module' that significantly improved long-distance data transmission based on Qualcomm's chip and vehicle-to-everything (V2X) reception. This technology is a 5G mobile communication technology and component that supports data transmission and reception on vehicle-to-vehicle (V2V), vehicle-to-pedestrian (V2P), and vehicle-to-infrastructure (V2I).

Demand – Drivers and Challenges

Following are the drivers for the global EV charging communication unit market:

The increasing adoption of electric vehicles (EVs)

The need for fast and reliable charging solutions

Standardization and interoperability

Following are the challenges for the global EV charging communication unit market:

Limited infrastructure availability and geographic distribution

Up-front vehicle and charging infrastructure costs

How can this report add value to end users?

Product/Innovation Strategy: The product segment helps the readers understand the different types of EV charging communication units. Also, the study provides the readers with a detailed understanding of the global EV charging communication unit market based on application and product.

Growth/Marketing Strategy: To improve the capabilities of their product offerings, players in the global EV charging communication unit market are developing unique products. The readers will be able to comprehend the revenue-generating tactics used by players in the global EV charging communication unit market by looking at the growth/marketing strategies. Other market participants' tactics, such as go-to-market plans, will also assist readers in making strategic judgments.

Competitive Strategy: Players in the global EV charging communication unit market analyzed and profiled in the study include vehicle manufacturers that capture the maximum share of the market. Moreover, a detailed competitive benchmarking of the players operating in the global EV charging communication unit market has been done to help the readers understand how players compete against each other, presenting a clear market landscape. Additionally, comprehensive competitive strategies such as partnerships, agreements, collaborations, and mergers and acquisitions are expected to aid the readers in understanding the untapped revenue pockets in the market.

Key Market Players and Competition Synopsis

The companies that are profiled have been selected based on inputs gathered from primary experts and analyzing company coverage, product portfolio, and market penetration.

Some of the prominent names established in EV charging communication unit market are:

Akka Technologies

Auto Motive Power (AMP)

Continental AG

Dana Limited

Ficosa Internacional SA

Hyundai Mobis

LG Innotek

Mitsubishi Electric Corporation

Neusoft Corporation

Qualcomm Technologies, Inc.

Robert Bosch GmbH

Sensata Technologies, Inc.

STMicroelectronics N.V.

Vector Informatik GmbH

Vitesco Technologies GmbH

Companies that are not a part of the aforementioned pool have been well represented

across different sections of the report (wherever applicable).

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