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Global Public Fast Charging Third-party Operation Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Public Fast Charging Third-party Operation market size is expected to reach $ 10509 million by 2032, rising at a market growth of 12.2% CAGR during the forecast period (2026-2032).

Public Fast Charging Third-party Operation refers to the provision of ongoing operation and management services for publicly accessible DC fast-charging infrastructure by independent charging operators, charging-network platforms or specialized service providers on behalf of charging-station owners, site hosts, fleet operators, utilities, retailers and other asset owners. The market covers charging-network onboarding, station monitoring, charging control, pricing management, payment and settlement, roaming connectivity, customer service, remote diagnostics, maintenance coordination, marketing, utilization optimization, energy management and, in more integrated models, full-service or turnkey station operation. Revenue is primarily generated through operation-management fees, charging-service commissions, platform or SaaS fees, payment and settlement fees, maintenance contracts and integrated managed-service arrangements attributable to public fast-charging operations. The statistical scope focuses on operating services associated with public DC fast charging for private passenger EVs, ride-hailing and taxi vehicles, light commercial vehicles, and heavy-duty trucks and buses, while electricity pass-through revenue, standalone charger equipment sales, construction/EPC revenue and unrelated private residential charging activities are separated from the core third-party operation revenue.

Key Findings

China had 5.009 million public charging connectors by June 2026, providing the world's

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largest infrastructure base for charging-operation services

More than 180,000 high-power charging connectors had been deployed in China by June 2026, accelerating the shift toward higher-output operation models

Eight privately owned companies among China's ten largest charging operators managed 70.7% of public chargers as of September 2025

Public charging competition is shifting from simple network expansion toward utilization, reliability, payments, energy management and integrated managed operations

Passenger EV and ride-hailing charging remain core demand pools while commercial fleets and heavy-duty transport create higher-utilization operating opportunities

Market Trends

The Public Fast Charging Third-party Operation market is moving from a relatively simple charging-network management model toward an integrated infrastructure-operation and energy-service model. Higher charging power is becoming an increasingly important differentiator as 800 V vehicle platforms, shorter expected charging times and high-throughput fleet applications raise demand for 150–350 kW and above-350 kW charging. At the same time, operators are increasingly using dynamic power allocation, remote diagnostics, predictive maintenance, automated pricing, digital payments and integrated charge point management systems to improve station uptime and revenue per installed charger. The commercial model is also becoming more asset-light and modular: station owners can retain infrastructure ownership while outsourcing software, payment settlement, customer operations, maintenance and full network management to specialist operators. Open-platform interoperability, white-label CPO services and roaming are reducing the need for each site owner to build an independent technology stack. Energy management is emerging as another long-term layer of value creation, with battery storage, demand response, renewable integration and grid flexibility increasingly connected to charging operations. China's energy authorities have explicitly identified a shift in industry competition from expanding scale toward improving services, while European platform providers are beginning to commercialize grid-flexibility services as an additional revenue source for CPOs.

Latest Developments / News

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Recent developments illustrate the rapid transition toward higher-power infrastructure and more sophisticated third-party operating models. In September 2025, China's National Development and Reform Commission and other ministries issued the 2025–2027 charging-service-capacity action plan, targeting 28 million charging facilities and more than 300 million kW of public charging capacity by the end of 2027; the plan also calls for 1.6 million additional urban DC charging connectors, including 100,000 high-power connectors. By June 2026, China had already reached 5.009 million public charging connectors and more than 180,000 high-power connectors. In North America, ChargePoint introduced its 600 kW Express Solo DC platform in April 2026 and in July expanded cooperation with Optimus Energy Solutions to support more than 200 new public charging ports through a hardware, software and services model. EVgo, General Motors and Pilot reported in August 2026 that their joint fast-charging network had surpassed 300 locations and 1,300 stalls across 40 states, while EVgo separately announced plans to deploy V4-based EVgo Superchargers capable of up to 500 kW. Electrify America opened a 20-charger, 350 kW site in Santa Barbara in June 2026 with a 1.9 MW battery energy storage system, demonstrating increasing integration between fast charging and site-level energy management. Platform monetization is also broadening: ChargePoint partnered with Cariqa in August 2026 to provide direct-payment capabilities to CPO customers on its be.ENERGISED platform, while Virta opened grid-flexibility participation to charging operators in France and the UK in September 2026, indicating that charging-operation revenue is expanding beyond charging transactions toward payments, utilization management and grid services.

Market Dynamics

Drivers

Growth is primarily driven by the expanding electric-vehicle parc, greater dependence on public fast charging among drivers without reliable home charging, rising charging intensity from ride-hailing and commercial fleets, and continued investment in urban and highway charging infrastructure. Higher-power vehicle architectures are also raising the value of professional station operation because fast-charging sites require more sophisticated load management, monitoring, maintenance and energy-cost optimization than conventional low-power charging sites. Public policy remains supportive in major markets. China's 2025–2027 action plan explicitly prioritizes fast charging in urban networks and large-scale deployment of additional DC charging infrastructure, while the EU Alternative Fuels Infrastructure Regulation establishes minimum deployment, interoperability, payment and user-information requirements for public charging

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infrastructure.

Restraints

The main restraints are the economics and operational complexity of high-power public charging. Grid-connection capacity, transformer upgrades, demand charges, electricity procurement, land and parking costs, and equipment maintenance can materially affect station profitability. New sites may also require a substantial ramp-up period before utilization reaches commercially attractive levels, making operating economics highly dependent on location quality and traffic forecasting. Fragmentation among charging interfaces, payment systems, roaming networks and regional regulatory requirements adds further integration costs. For third-party operators, service-fee competition can compress margins even while customers demand higher uptime, faster fault response and more transparent pricing.

Opportunities

The strongest incremental opportunities are developing in high-utilization scenarios and outsourced operating models. Ride-hailing and taxi fleets create frequent daily charging demand and can support higher station turnover, while light commercial vehicles and urban delivery fleets offer predictable charging schedules that facilitate capacity planning. Heavy-duty trucks and buses represent a longer-term high-value opportunity because their large battery packs require high-power charging, dedicated depots and more advanced load management. Retail centers, fuel stations, parking operators, highway service areas and commercial property owners increasingly provide another customer base for white-label or fully managed charging services because these asset owners can monetize EV traffic without building their own charging software and operating organizations. Energy storage, demand response, virtual power plants and grid-flexibility services can further create incremental revenue from existing charging assets.

Challenges

The industry must manage a difficult balance between network growth and station economics. Competition for high-quality locations can raise site-acquisition costs, while rapid increases in charging power can shorten technology replacement cycles and increase grid requirements. Operators must maintain high charger availability across

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increasingly heterogeneous equipment fleets and support multiple vehicle interfaces, payment methods and roaming relationships. Cybersecurity, payment compliance, data interoperability and accurate real-time station information are becoming increasingly important operational requirements. Longer term, intense price competition and growing customer expectations may favor companies with sufficient scale, software capability, field-service networks and energy-management expertise, while smaller operators could face higher customer-acquisition and maintenance costs.

Value Chain Analysis

The value chain begins with charging hardware, power electronics, transformers and switchgear, metering, communication modules, payment infrastructure, grid connections and cloud-based charge point management software. Site owners or investors then provide locations and capital, while third-party operators connect physical charging assets to digital operating platforms. The core operating layer includes charger commissioning, connectivity management, remote monitoring, tariff configuration, transaction processing, settlement, roaming, fault detection, maintenance dispatch, customer support, marketing and utilization optimization. Higher-value operators increasingly add energy procurement, dynamic load management, battery storage control, demand response and virtual-power-plant functionality. Downstream customers include retail and commercial property owners, highway service areas, parking operators, municipalities, fleet operators and other charging-asset owners, while end demand is generated by private EV drivers, ride-hailing and taxi vehicles, commercial fleets, buses and trucks. The highest operating value is increasingly created not by charger ownership alone but by maintaining availability, maximizing throughput, controlling energy costs and converting charging data into higher utilization and recurring service revenue.

Segment Insights

By charging power, the installed public fast-charging base still contains a substantial number of lower-output DC units, while new investment is increasingly moving toward the 151–350 kW category and above-350 kW systems. The 151–350 kW segment offers a balance between vehicle compatibility, grid requirements and charging speed and is therefore well suited to highway corridors, urban hubs and high-turnover retail locations. Above-350 kW charging represents a higher-value operating segment, particularly for 800 V passenger vehicles and emerging commercial-vehicle applications, but it also requires more advanced power sharing, transformer capacity and energy-cost control. China's rapid deployment of high-power connectors and recent

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500–600 kW product and network announcements in North America confirm this direction.

By charging-interface ecosystem, GB/T remains central to the Chinese market, CCS remains important across Europe, and NACS/J3400 is expanding within North American public fast charging, while CHAdeMO increasingly represents a legacy installed-base requirement. The operator structure also differs by region: independent charging service platforms play an important role in China and Europe, while utilities, retailers, fuel-station operators and property owners frequently cooperate with specialist CPOs or platform providers. In terms of service depth, platform-based operation generates relatively asset-light recurring software and transaction revenue, whereas managed operation, full-service operation and turnkey models capture more revenue per station but require stronger maintenance, customer-service and energy-management capabilities.

Downstream Market Opportunities

Private passenger EV public fast charging remains the broadest demand base because growth in EV ownership increases the need for convenient urban, retail and highway charging, especially for users without dedicated residential charging. Ride-hailing and taxi fleets are particularly attractive to third-party operators because high vehicle mileage produces frequent and relatively predictable charging demand, improving charger utilization. Light commercial vehicles used in urban logistics and last-mile delivery are emerging as another important opportunity as fleet electrification expands and operators seek centrally managed charging, payment and energy-control services. Heavy-duty trucks and buses have lower current network density but higher energy demand per charging event; their expansion is likely to support dedicated high-power hubs and more complex managed charging services. China's energy authorities are already linking charging-network development with the scaling of new-energy heavy trucks, which strengthens the medium-term opportunity for high-power fleet charging operations.

Regional Insights

China represents the most developed infrastructure base for Public Fast Charging Third-party Operation. By the end of June 2026, the country had 5.009 million public charging connectors with rated public charging capacity of approximately 247 million kW, while more than 180,000 high-power connectors had been deployed. The scale of the market

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supports a broad ecosystem of independent and platform-based operators including Jiangsu YKC new energy technology Co.Ltd, TELD New Energy Co., LTD, Wanbang Star Charge Technology Co., Ltd., DiDi Charging and Guangzhou Weijing Technology Co., Ltd. The policy focus is increasingly shifting from basic infrastructure availability toward charging efficiency, high-power deployment, station reliability and service quality.

North America is characterized by partnerships between CPOs, automotive companies, retailers, property owners and charging-platform suppliers. ChargePoint, EVgo Services LLC, Electrify America LLC, EV Connect, Inc., Blink Charging Co. and Services FLO Inc. participate through different combinations of network ownership, software, managed services and site-host partnerships. Recent EVgo and ChargePoint projects show continued expansion into retail, highway and fleet charging while NACS integration and higher charging power are becoming increasingly important competitive factors. Europe is more strongly shaped by interoperability, cross-border roaming, transparent ad-hoc payment and energy-system integration. The EU's Alternative Fuels Infrastructure Regulation requires progressively denser high-power charging coverage along TEN-T corridors and emphasizes interoperability and accessible payment, supporting demand for professional CPO management platforms. Threeforce B.V., Liikennevirta Oy and Driivz Ltd. are representative of the software-intensive and cross-network operating model, while developments such as Virta's grid-flexibility offering illustrate the region's movement toward charging-plus-energy-services models.

Competitive Landscape Analysis

The competitive landscape is regionally fragmented but increasingly platform-driven. Chinese participants such as Jiangsu YKC new energy technology Co.Ltd, TELD New Energy Co., LTD, Wanbang Star Charge Technology Co., Ltd., DiDi Charging and Guangzhou Weijing Technology Co., Ltd. benefit from the scale and high transaction frequency of China's public charging ecosystem. DiDi Charging illustrates the transition toward integrated operation: its platform combines charging-network access, station operating support, SaaS tools, energy management and virtual-power-plant capabilities, and the business was rebranded from Xiaojü Charging to DiDi Charging in November 2025 as the company emphasized service quality and user experience.

In North America, ChargePoint emphasizes an owner-hosted network model combining hardware, software and services; EVgo Services LLC and Electrify America LLC combine network operation with high-power site development and strategic

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partnerships; EV Connect, Inc., Blink Charging Co. and Services FLO Inc. compete through managed-network, turnkey and operating-service capabilities. In Europe, Threeforce B.V., Liikennevirta Oy and Driivz Ltd. are positioned around scalable CPMS, roaming, payments, energy management and operator enablement. Competition is therefore moving beyond charger count toward uptime, station utilization, direct payment, network interoperability, energy optimization, customer acquisition and the ability to support multiple hardware platforms. ChargePoint's 2026 direct-payment partnership with Cariqa and Virta's grid-flexibility service show how CPO platforms are expanding into higher-value monetization layers.

Report Scope

This report studies the global Public Fast Charging Third-party Operation demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Public Fast Charging Third-party Operation, and provides market size (US$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Public Fast Charging Third-party Operation that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Public Fast Charging Third-party Operation total market, 2021-2032, (USD Million)

Global Public Fast Charging Third-party Operation total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Public Fast Charging Third-party Operation total market, key domestic companies, and share, (USD Million)

Global Public Fast Charging Third-party Operation revenue by player, revenue and market share 2021-2026, (USD Million)

Global Public Fast Charging Third-party Operation total market by Rated Charging Power Types, CAGR, 2021-2032, (USD Million)

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Global Public Fast Charging Third-party Operation total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Public Fast Charging Third-party Operation market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include TELD New Energy Co., Ltd., Jiangsu YKC New Energy Technology Co., Ltd., Wanbang Star Charge Technology Co., Ltd., Tesla, Inc., DiDi Charging, Shell plc, Electrify America, LLC, State Grid EV Service Co., Ltd., IONITY GmbH, e-Mobility Power Co.,Inc., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Public Fast Charging Third-party Operation market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), by player, by regions, by Rated Charging Power Types, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Public Fast Charging Third-party Operation Market, By Region:

United States

China

Europe

Japan

South Korea

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ASEAN

India

Rest of World

Market Segmentation

Global Public Fast Charging Third-party Operation Market, Segmentation by Rated Charging Power Types:

Standard DC Fast Charging (>22–150 kW)

Ultra-Fast Charging (>150–350 kW)

Very High-Power Charging (>350 kW)

Global Public Fast Charging Third-party Operation Market, Segmentation by Operator Types:

Independent Service Providers

Utility Companies

Others

Global Public Fast Charging Third-party Operation Market, Segmentation by Operation Service Scope Types:

Platform-Based Operation Services

Managed Operation Services

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Global Public Fast Charging Third-party Operation Market, Segmentation by Application:

Private Passenger EV Public Fast Charging

Ride-Hailing and Taxi Public Fast Charging

Light Commercial Vehicle Public Fast Charging

Heavy-Duty Truck and Bus Public Fast Charging

Companies Profiled:

TELD New Energy Co., Ltd.

Jiangsu YKC New Energy Technology Co., Ltd.

Wanbang Star Charge Technology Co., Ltd.

Tesla, Inc.

DiDi Charging

Shell plc

Electrify America, LLC

State Grid EV Service Co., Ltd.

IONITY GmbH

e-Mobility Power Co.,Inc.

EVgo Inc.

Allego N.V.

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Fastned B.V.

bp p.l.c.

ChargePoint, Inc.

Evking

ShenZhen Carenergy Net Co.,Ltd

Key Questions Answered

1. How big is the global Public Fast Charging Third-party Operation market?
2. What is the demand of the global Public Fast Charging Third-party Operation market?
3. What is the year over year growth of the global Public Fast Charging Third-party Operation market?
4. What is the total value of the global Public Fast Charging Third-party Operation market?
5. Who are the Major Players in the global Public Fast Charging Third-party Operation market?
6. What are the growth factors driving the market demand?

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