

# Europe Electric Vehicle On-Board Charger Market Opportunity, Growth Drivers, Industry Trend Analysis, and Forecast 2025 - 2034

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## Abstracts

Europe Electric Vehicle On-Board Charger Market was valued at USD 6.4 billion in 2024 and is estimated to grow at a CAGR of 20.4% to reach USD 41.4 billion by 2034. This market is undergoing a major transformation, fueled by evolving environmental regulations, cutting-edge power conversion technologies, and rapidly growing consumer interest in zero-emission transportation. With Europe's commitment to decarbonization, the role of on-board chargers (OBCs) has shifted from a functional component to a key enabler of the EV infrastructure. Governmental pressure to reduce carbon emissions has resulted in national-level incentives, tax breaks, and strategic investments in electric mobility. These policies have created a favorable environment for both automakers and charger manufacturers to expand offerings.

The increasing adoption of advanced technologies such as bidirectional charging and Vehicle-to-Grid (V2G) capabilities further supports OBC integration into the larger energy ecosystem. These solutions not only enable energy flow from vehicle to grid but also enhance grid stability and renewables integration. Several European countries have initiated pilot projects, underscoring the strategic importance of smart, grid-interactive on-board chargers. France has emerged as a strong performer in this space, driven by its eco-incentive policies and rising consumer interest in electrified transport.

The battery electric vehicles segment held a 73% share in 2024 and is forecast to grow at a CAGR of 20.9% through 2034. BEVs have become the leading segment due to their complete reliance on electricity for propulsion. This has prompted a surge in demand for high-efficiency, fast-charging OBCs that enhance vehicle usability. Automotive OEMs across Europe have adopted 11 kW to 22 kW AC on-board chargers to reduce charging times and meet user expectations for convenience. These high-

power chargers have become standard in mid- to premium-range BEV models as automakers focus on faster turnaround times and optimal energy transfer for daily commuting and long-distance travel alike.

The chargers rated under the 11 kW segment captured a 3.5% share in 2024. These lower-rated OBCs continue to offer affordable charging solutions primarily suited for compact EVs and plug-in hybrid vehicles, which typically operate in densely populated city settings. Vehicles using these systems benefit from integration with common AC power outlets found in homes and offices, allowing for overnight or workplace charging. This charger category remains viable in regions where fast-charging infrastructure is not yet widespread, especially across suburban and smaller city locations. Their cost-effectiveness and ease of integration into small battery platforms sustain their relevance in specific market segments.

Germany Europe Electric Vehicle On-Board Charger Market held a 17% share, generating USD 1.1 billion. Germany's leadership stems from its accelerated investments in EV production, R&D, and related infrastructure. Policy initiatives continue to create strong incentives for EV adoption, while the country's well-established auto manufacturing sector gives it a competitive edge in developing cutting-edge on-board charging systems. The alignment of environmental goals with innovation and industrial support has helped maintain Germany's dominance in the region's OBC space, with sustained efforts in deploying both AC and bidirectional charging architecture across multiple platforms.

Key players shaping the landscape of the Europe Electric Vehicle On-Board Charger Market include Infineon Technologies, STMicroelectronics, ZF Friedrichshafen AG, and Delta Electronics. These companies are making strategic moves to capitalize on the growing demand and shift toward energy-efficient and connected charging solutions. Key strategies adopted by companies in this market include continuous investment in R&D to improve charging efficiency and compact system design, partnerships with automakers to integrate modular OBCs into next-gen EV platforms, and expansion of manufacturing capacity to meet regional demand surges.

## **Comprehensive Market Analysis and Forecast**

Industry trends, key growth drivers, challenges, future opportunities, and regulatory landscape

Competitive landscape with Porter's Five Forces and PESTEL analysis

Market size, segmentation, and regional forecasts

In-depth company profiles, business strategies, financial insights, and SWOT analysis

## Contents

### **CHAPTER 1 METHODOLOGY & SCOPE**

- 1.1 Research design
  - 1.1.1 Research approach
  - 1.1.2 Data Collection methods
- 1.2 Base estimates & calculations
  - 1.2.1 Base year calculations
  - 1.2.2 Key trends for market estimation
- 1.3 Forecast model
- 1.4 Primary research and validation
  - 1.4.1 Primary sources
  - 1.4.2 Data mining sources
- 1.5 Market definitions

### **CHAPTER 2 EXECUTIVE SUMMARY**

- 2.1 Industry synopsis, 2021 - 2034
  - 2.1.1 Business trends
  - 2.1.2 Propulsion trends
  - 2.1.3 Rating trends
  - 2.1.4 Regional trends

### **CHAPTER 3 INDUSTRY INSIGHTS**

- 3.1 Industry ecosystem analysis
  - 3.1.1 Supply chain dynamics
  - 3.1.2 Raw material dependencies
  - 3.1.3 Manufacturing ecosystem
- 3.2 Regulatory landscape
- 3.3 Electric vehicle adoption trend
- 3.4 Price trend analysis, (USD/Unit)
  - 3.4.1 By rating
- 3.5 Industry impact forces
  - 3.5.1 Growth drivers
  - 3.5.2 Industry pitfalls & challenges
- 3.6 Growth potential analysis
- 3.7 Porter's Analysis

- 3.7.1 Bargaining power of suppliers
- 3.7.2 Bargaining power of buyers
- 3.7.3 Threat of new entrants
- 3.7.4 Threat of substitutes
- 3.8 PESTEL Analysis
- 3.9 Emerging opportunities & trends
  - 3.9.1 Digitalization & IoT integration
  - 3.9.2 Emerging market penetration

## **CHAPTER 4 COMPETITIVE LANDSCAPE, 2025**

- 4.1 Introduction
- 4.2 Company market share analysis, by country, 2024
  - 4.2.1 Norway
  - 4.2.2 Germany
  - 4.2.3 France
  - 4.2.4 Netherlands
  - 4.2.5 UK
  - 4.2.6 Sweden
- 4.3 Strategic dashboard
- 4.4 Strategic initiatives
- 4.5 Competitive benchmarking
- 4.6 Innovation & technology landscape

## **CHAPTER 5 MARKET SIZE AND FORECAST, BY PROPULSION, 2021 - 2034 (UNIT, USD BILLION)**

- 5.1 Key trends
- 5.2 BEV
- 5.3 PHEV
- 5.4 Others

## **CHAPTER 6 MARKET SIZE AND FORECAST, BY RATING, 2021 - 2034 (UNITS, USD BILLION)**

- 6.1 Key trends
- 6.2 6.3 > 11 kW to 22 kW
- 6.4 > 22 kW

## **CHAPTER 7 MARKET SIZE AND FORECAST, BY COUNTRY, 2021 - 2034 (UNITS, USD BILLION)**

- 7.1 Key trends
- 7.2 Norway
- 7.3 Germany
- 7.4 France
- 7.5 Netherlands
- 7.6 UK
- 7.7 Sweden

## **CHAPTER 8 COMPANY PROFILES**

- 8.1 alfanar Group
- 8.2 Aptiv
- 8.3 Bell Power Solution
- 8.4 BorgWarner Inc.
- 8.5 BRUSA Elektronik AG
- 8.6 Continental AG
- 8.7 Delphi Technologies
- 8.8 Delta Energy Systems
- 8.9 Eaton Corporation
- 8.10 Ficosa International SA
- 8.11 Infineon Technologies AG
- 8.12 innoelectric AG
- 8.13 LG Magna e-Powertrain Co., Ltd
- 8.14 Mahle Group
- 8.15 Powell Industries
- 8.16 Stercom Power Solutions GmbH
- 8.17 STMicroelectronics
- 8.18 Toyota Industries Corporation
- 8.19 Valeo Group
- 8.20 Xepics Italia SRL

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