

# India Electric Vehicle Charging Station Market Size, Share, Trends and Forecast by Charging Station Type, Vehicle Type, Installation Type, Charging Level, Connector Type, Application, and Region, 2026-2034

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## Abstracts

The India electric vehicle charging station market size was valued at USD 589.1 Million in 2025. Looking forward, IMARC Group estimates the market to reach USD 1,105.2 Million by 2034, exhibiting a CAGR of 6.88% during 2026-2034. North India currently dominates the market, holding a significant market share of over 33.8% in 2025 on account of rapid urbanization, supportive government policies, and high vehicle concentration. The region is witnessing strong growth in charging infrastructure, with both public and private sectors actively investing to meet rising demand and promote the widespread adoption of electric mobility.

The India electric vehicle charging station market is driven by several key factors. Government initiatives, such as FAME II and state EV policies, are providing subsidies and incentives to boost EV adoption and charging infrastructure. Rising environmental concerns and fuel price volatility are encouraging a shift toward cleaner mobility. Rapid urbanization, increased vehicle density, and growing awareness of electric mobility are further propelling demand. Advancements in battery technology and declining EV costs are making electric vehicles more accessible, which in turn increases the need for robust charging networks. Additionally, private sector participation and strategic partnerships between automakers, energy providers, and tech firms are accelerating deployment. Smart city projects and digital payment integration are also enhancing user convenience and driving market growth.

Large-scale investments are accelerating the shift toward renewable-powered EV infrastructure in India. Focus is growing on fleet-centric charging hubs, particularly in

urban centers like Bengaluru. Collaborations across clean energy, tech, and consulting sectors are supporting scalable models that cut fuel use and emissions, signaling stronger alignment with long-term decarbonization goals. For instance, in September 2024, Amazon's Climate Pledge Fund backed a project in Bengaluru to expand India's EV charging station network. The initiative committed USD 2.65 Million to build renewable energy-powered charging hubs under the JOULE network. Targeting corporate EV fleets, the project aimed to support 5,500 EVs by 2030. Partners included Kazam, Greenko, and Deloitte. The expected environmental impact included saving 11.2 million liters of fuel and cutting 25,700 tons of CO<sub>2</sub> emissions.

## India Electric Vehicle Charging Station Market Trends:

### Rapid Scale-Up in Charging Infrastructure Demand

The growing shift toward electric mobility in India is fueling strong momentum in charging infrastructure development. As adoption rises across personal, commercial, and public transport segments, there is a marked push to establish widespread and accessible charging networks. Both government initiatives and private sector efforts are converging to improve grid readiness, support faster charging technologies, and expand reach across cities and highways. This movement is shaping the ecosystem around convenience, reliability, and interoperability, paving the way for a more integrated and efficient charging experience aligned with the country's broader electrification goals. For example, according to the India Brand Equity Foundation, the Indian EV market is forecasted to expand from USD 3.21 Billion in 2022 to USD 113.99 Billion by 2029, with a CAGR of 66.52%.

### Boost in Public Charging Accessibility

Policy support continues to shape the direction of India's electric mobility efforts, with renewed emphasis on strengthening charging infrastructure. Recent government initiatives have prioritized expanding the public charging network to make it more accessible and user-friendly across urban and semi-urban locations. This push is aimed at reducing range anxiety, encouraging adoption across segments, and enabling smoother integration of electric vehicles into daily transport routines. The focus is also shifting toward standardization, ease of use, and better geographic coverage, signaling a broader commitment to creating a dependable and future-ready charging ecosystem. For instance, the launch of the USD 1.31 Billion PM E-DRIVE scheme in October 2024 strengthened India's EV transition, with USD 0.24 Billion allocated for public charging stations to enhance their reach and usability, as stated by the International Council on

Clean Transportation (ICCT).

## Push Toward Low-Carbon Mobility Solutions

India's decarbonization goals are accelerating the shift toward cleaner transportation options, placing greater focus on the development of electric vehicle charging infrastructure. As part of broader environmental targets, the charging ecosystem is gaining importance in efforts to reduce emissions across urban and intercity travel. There is growing alignment between climate objectives and infrastructure planning, with increased attention on expanding coverage, improving energy efficiency, and integrating renewable energy sources. This direction supports a longer-term vision of sustainable mobility, where widespread charging access plays a critical role in reducing the environmental footprint of the transport sector. For example, as per Startup India, the country aims to decrease total projected carbon emissions by one billion tons by 2030.

## India Electric Vehicle Charging Station Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the India electric vehicle charging station market, along with forecasts at the regional level from 2026-2034. The market has been categorized based on charging station type, vehicle type, installation type, charging level, connector type, and application.

## Analysis by Charging Station Type:

AC Charging

DC Charging

Inductive Charging

DC charging stands as the largest component in 2025, holding around 63.7% of the market due to its ability to deliver high-speed charging, making it ideal for commercial use and highway applications. As EV adoption rises, especially in fleet operations and long-distance travel, the demand for fast and efficient charging solutions has grown. DC chargers significantly reduce charging time compared to AC chargers, improving turnaround for electric taxis, buses, and delivery vehicles. Government programs and infrastructure policies are also increasingly prioritizing the installation of DC fast chargers along highways and in urban centers. This emphasis on reducing range

anxiety and improving convenience is pushing the expansion of DC charging networks, positioning them as a dominant force driving market growth.

Analysis by Vehicle Type:

Battery Electric Vehicle (BEV)

Plug-in Hybrid Electric Vehicle (PHEV)

Hybrid Electric Vehicle (HEV)

Battery electric vehicle (BEV) led the market with around 75.1% of market share in 2025, owing to its complete reliance on external charging infrastructure. Unlike hybrid models, BEVs lack internal combustion engines or alternative fuel options, making access to reliable charging stations essential. The Indian government's strong policy push for zero-emission mobility, along with rising fuel costs, has accelerated BEV adoption across both personal and commercial segments. As BEVs gain popularity, especially in urban fleets and public transportation, the need for a widespread and efficient charging network becomes critical. This demand is encouraging investment in charging infrastructure, especially in high-density areas, thereby boosting the market.

Analysis by Installation Type:

Portable Charger

Fixed Charger

Fixed charger led the market with around 83.8% of market share in 2025. This is due to the widespread deployment of fixed chargers across residential complexes, commercial hubs, and public spaces. These chargers offer stable, high-capacity charging solutions, ideal for regular daily use. Their reliability, ease of integration with existing power infrastructure, and lower maintenance needs make them preferred over portable options. As urban EV adoption increases, fixed charging stations provide the necessary support for users seeking convenient and permanent solutions. Government programs and smart city initiatives further promote fixed charger installations, reinforcing their role as a key factor driving market growth in India.

### Analysis by Charging Level:

Level 1

Level 2

Level 3

Level 3 led the market with around 58.7% of market share in 2025, owing to its ability to deliver high-speed DC charging, making it ideal for time-sensitive users and commercial fleets. These chargers significantly reduce charging durations compared to Level 1 and Level 2, supporting quick turnaround for electric buses, taxis, and long-distance travelers. The increasing push for fast-charging infrastructure in urban areas and highways, backed by government initiatives and infrastructure targets, is accelerating Level 3 charger deployment. Their role in minimizing range anxiety and enhancing EV usability is driving demand, making them a key driver of market growth.

### Analysis by Connector Type:

Combines Charging Station (CCS)

CHAdeMO

Normal Charging

Tesla Supercharger

Type-2 (IEC 621196)

Others

Combines charging station (CCS) led the market with around 43.8% of market share in 2025 due to its compatibility with both AC and DC charging, offering flexibility and faster charging capabilities. As EV manufacturers increasingly adopt CCS as the standard, infrastructure providers are prioritizing its deployment to ensure wide vehicle compatibility. CCS supports fast-charging needs, making it suitable for both personal and commercial EV segments. Its ability to serve multiple vehicle types with a single

connector improves efficiency and reduces installation complexity. Growing BEV adoption and the push for standardized, future-ready infrastructure are driving CCS expansion across India's charging network.

#### Analysis by Application:

Residential

Commercial

Commercial led the market with around 79.2% of market share in 2025. This is due to the rapid growth of electric fleets, ride-hailing services, public transport, and logistics operations. These sectors require high-capacity, fast-charging infrastructure to ensure efficient operations and minimal downtime. Urban centers and highway corridors are witnessing increased deployment of commercial charging stations to meet rising demand. Additionally, government incentives and public-private partnerships are supporting the expansion of commercial EV infrastructure. The emphasis on electrifying public and commercial transport fleets, along with the need for scalable charging solutions, makes the commercial segment a primary driver of market growth in India.

#### Regional Analysis:

North India

West and Central India

South India

East India

In 2025, North India accounted for the largest market share of over 33.8%, owing to strong government initiatives, high urbanization, and early EV adoption in key states like Delhi, Uttar Pradesh, and Haryana. These states offer policy incentives, dedicated EV mobility schemes, and active support for infrastructure development. Delhi, in particular, has aggressively promoted public and private EV charging networks through subsidies and mandates. The presence of dense population centers and major commercial transport hubs further increases demand for reliable charging infrastructure. This

combination of policy support, economic activity, and concentrated vehicle use drives the region's leadership in market growth.

#### Competitive Landscape:

India electric vehicle charging station market is experiencing strong growth, driven by strategic partnerships, government-backed initiatives, and technology collaborations. Automakers are teaming up with energy providers and tech startups to expand infrastructure and improve accessibility. The government is actively supporting these efforts through policy incentives and funding schemes focused on both urban and highway networks. Startups and established firms are working on R&D to boost charger efficiency and integrate smart features. Product launches are increasingly aimed at faster, more compact, and networked charging units. Among all these, partnerships and collaborations are the most common practice, helping companies scale quickly and align with national electrification goals. These joint efforts are shaping the future of EV charging in India.

The report provides a comprehensive analysis of the competitive landscape in the India electric vehicle charging station market with detailed profiles of all major companies, including:

ABB Ltd.

Ather Energy Limited

Bolt.Earth

BrightBlu

ChargeZone

Charzer

Delta Electronics, Inc.

Exicom

GLIDA

Jio-bp

Statiq

Tata Power Company Limited

#### Key Questions Answered in This Report

- 1.How big is the electric vehicle charging station market in the India?
- 2.What factors are driving the growth of the India electric vehicle charging station market?
- 3.What is the forecast for the electric vehicle charging station market in the India?
- 4.Which segment accounted for the largest India electric vehicle charging station market share?

## Contents

### **1 PREFACE**

### **2 SCOPE AND METHODOLOGY**

- 2.1 Objectives of the Study
- 2.2 Stakeholders
- 2.3 Data Sources
  - 2.3.1 Primary Sources
  - 2.3.2 Secondary Sources
- 2.4 Market Estimation
  - 2.4.1 Bottom-Up Approach
  - 2.4.2 Top-Down Approach
- 2.5 Forecasting Methodology

### **3 EXECUTIVE SUMMARY**

### **4 INTRODUCTION**

- 4.1 Overview
- 4.2 Key Industry Trends

### **5 INDIA ELECTRIC VEHICLE CHARGING STATION MARKET**

- 5.1 Market Overview
- 5.2 Market Performance
- 5.3 Impact of COVID-19
- 5.4 Market Forecast

### **6 MARKET BREAKUP BY CHARGING STATION TYPE**

- 6.1 AC Charging
  - 6.1.1 Market Trends
  - 6.1.2 Market Forecast
- 6.2 DC Charging
  - 6.2.1 Market Trends
  - 6.2.2 Market Forecast
- 6.3 Inductive Charging

- 6.3.1 Market Trends
- 6.3.2 Market Forecast

## **7 MARKET BREAKUP BY VEHICLE TYPE**

- 7.1 Battery Electric Vehicle (BEV)
  - 7.1.1 Market Trends
  - 7.1.2 Market Forecast
- 7.2 Plug-in Hybrid Electric Vehicle (PHEV)
  - 7.2.1 Market Trends
  - 7.2.2 Market Forecast
- 7.3 Hybrid Electric Vehicle (HEV)
  - 7.3.1 Market Trends
  - 7.3.2 Market Forecast

## **8 MARKET BREAKUP BY INSTALLATION TYPE**

- 8.1 Portable Charger
  - 8.1.1 Market Trends
  - 8.1.2 Market Forecast
- 8.2 Fixed Charger
  - 8.2.1 Market Trends
  - 8.2.2 Market Forecast

## **9 MARKET BREAKUP BY CHARGING LEVEL**

- 9.1 Level
  - 9.1.1 Market Trends
  - 9.1.2 Market Forecast
- 9.2 Level
  - 9.2.1 Market Trends
  - 9.2.2 Market Forecast
- 9.3 Level
  - 9.3.1 Market Trends
  - 9.3.2 Market Forecast

## **10 MARKET BREAKUP BY CONNECTOR TYPE**

- 10.1 Combines Charging Station (CCS)

- 10.1.1 Market Trends
- 10.1.2 Market Forecast
- 10.2 CHAdeMO
  - 10.2.1 Market Trends
  - 10.2.2 Market Forecast
- 10.3 Normal Charging
  - 10.3.1 Market Trends
  - 10.3.2 Market Forecast
- 10.4 Tesla Supercharger
  - 10.4.1 Market Trends
  - 10.4.2 Market Forecast
- 10.5 Type-2 (IEC 621196)
  - 10.5.1 Market Trends
  - 10.5.2 Market Forecast
- 10.6 Others
  - 10.6.1 Market Trends
  - 10.6.2 Market Forecast

## **11 MARKET BREAKUP BY APPLICATION**

- 11.1 Residential
  - 11.1.1 Market Trends
  - 11.1.2 Market Forecast
- 11.2 Commercial
  - 11.2.1 Market Trends
  - 11.2.2 Market Forecast

## **12 MARKET BREAKUP BY REGION**

- 12.1 North India
  - 12.1.1 Market Trends
  - 12.1.2 Market Breakup by State
  - 12.1.3 Market Forecast
- 12.2 West and Central India
  - 12.2.1 Market Trends
  - 12.2.2 Market Breakup by State
  - 12.2.3 Market Forecast
- 12.3 South India
  - 12.3.1 Market Trends

12.3.2 Market Breakup by State

12.3.3 Market Forecast

12.4 East India

12.4.1 Market Trends

12.4.2 Market Breakup by State

12.4.3 Market Forecast

## **13 SWOT ANALYSIS**

13.1 Overview

13.2 Strengths

13.3 Weaknesses

13.4 Opportunities

13.5 Threats

## **14 VALUE CHAIN ANALYSIS**

## **15 PORTERS FIVE FORCES ANALYSIS**

15.1 Overview

15.2 Bargaining Power of Buyers

15.3 Bargaining Power of Suppliers

15.4 Degree of Competition

15.5 Threat of New Entrants

15.6 Threat of Substitutes

## **16 PRICE ANALYSIS**

## **17 POLICY AND REGULATORY LANDSCAPE**

## **18 COMPETITIVE LANDSCAPE**

18.1 Market Structure

18.2 Key Players

18.3 Profiles of Key Players

18.3.1 ABB Ltd.

18.3.2 Ather Energy Limited

18.3.3 Bolt.Earth

18.3.4 BrightBlu

- 18.3.5 ChargeZone
- 18.3.6 Charzer
- 18.3.7 Delta Electronics, Inc.
- 18.3.8 Exicom
- 18.3.9 GLIDA
- 18.3.10 Jio-bp
- 18.3.11 Statiq
- 18.3.12 Tata Power Company Limited

## List Of Tables

### LIST OF TABLES

Table 1: India: Electric Vehicle Charging Station Market: Key Industry Highlights, 2025 and 2034

Table 2: India: Electric Vehicle Charging Station Market Forecast: Breakup by Charging Station Type (in Million USD???) , 2026-2034

Table 3: India: Electric Vehicle Charging Station Market Forecast: Breakup by Vehicle Type (in Million USD???) , 2026-2034

Table 4: India: Electric Vehicle Charging Station Market Forecast: Breakup by Installation Type (in Million USD???) , 2026-2034

Table 5: India: Electric Vehicle Charging Station Market Forecast: Breakup by Charging Level (in Million USD???) , 2026-2034

Table 6: India: Electric Vehicle Charging Station Market Forecast: Breakup by Connector Type (in Million USD???) , 2026-2034

Table 7: India: Electric Vehicle Charging Station Market Forecast: Breakup by Application (in Million USD???) , 2026-2034

Table 8: India: Electric Vehicle Charging Station Market Forecast: Breakup by Region (in Million USD???) , 2026-2034

Table 9: India: Electric Vehicle Charging Station Market: Competitive Structure

Table 10: India: Electric Vehicle Charging Station Market: Key Players

## List Of Figures

### LIST OF FIGURES

Figure 1: India: Electric Vehicle Charging Station Market: Major Drivers and Challenges

Figure 2: India: Electric Vehicle Charging Station Market: Sales Value (in Million USD???) , 2020-2025

Figure 3: India: Electric Vehicle Charging Station Market Forecast: Sales Value (in Million USD???) , 2026-2034

Figure 4: India: Electric Vehicle Charging Station Market: Breakup by Charging Station Type (in %), 2025

Figure 5: India: Electric Vehicle Charging Station Market: Breakup by Vehicle Type (in %), 2025

Figure 6: India: Electric Vehicle Charging Station Market: Breakup by Installation Type (in %), 2025

Figure 7: India: Electric Vehicle Charging Station Market: Breakup by Charging Level (in %), 2025

Figure 8: India: Electric Vehicle Charging Station Market: Breakup by Connector Type (in %), 2025

Figure 9: India: Electric Vehicle Charging Station Market: Breakup by Application (in %), 2025

Figure 10: India: Electric Vehicle Charging Station Market: Breakup by Region (in %), 2025

Figure 11: India: Electric Vehicle Charging Station (AC Charging) Market: Sales Value (in Million USD???) , 2020 & 2025

Figure 12: India: Electric Vehicle Charging Station (AC Charging) Market Forecast: Sales Value (in Million USD???) , 2026-2034

Figure 13: India: Electric Vehicle Charging Station (DC Charging) Market: Sales Value (in Million USD???) , 2020 & 2025

Figure 14: India: Electric Vehicle Charging Station (DC Charging) Market Forecast: Sales Value (in Million USD???) , 2026-2034

Figure 15: India: Electric Vehicle Charging Station (Inductive Charging) Market: Sales Value (in Million USD???) , 2020 & 2025

Figure 16: India: Electric Vehicle Charging Station (Inductive Charging) Market Forecast: Sales Value (in Million USD???) , 2026-2034

Figure 17: India: Electric Vehicle Charging Station (Battery Electric Vehicle (BEV)) Market: Sales Value (in Million USD???) , 2020 & 2025

Figure 18: India: Electric Vehicle Charging Station (Battery Electric Vehicle (BEV)) Market Forecast: Sales Value (in Million USD???) , 2026-2034

Figure 19: India: Electric Vehicle Charging Station (Plug-in Hybrid Electric Vehicle

(PHEV)) Market: Sales Value (in Million USD???) , 2020 & 2025

Figure 20: India: Electric Vehicle Charging Station (Plug-in Hybrid Electric Vehicle (PHEV)) Market Forecast: Sales Value (in Million USD???) , 2026-2034

Figure 21: India: Electric Vehicle Charging Station (Hybrid Electric Vehicle (HEV)) Market: Sales Value (in Million USD???) , 2020 & 2025

Figure 22: India: Electric Vehicle Charging Station (Hybrid Electric Vehicle (HEV)) Market Forecast: Sales Value (in Million USD???) , 2026-2034

Figure 23: India: Electric Vehicle Charging Station (Portable Charger) Market: Sales Value (in Million USD???) , 2020 & 2025

Figure 24: India: Electric Vehicle Charging Station (Portable Charger) Market Forecast: Sales Value (in Million USD???) , 2026-2034

Figure 25: India: Electric Vehicle Charging Station (Fixed Charger) Market: Sales Value (in Million USD???) , 2020 & 2025

Figure 26: India: Electric Vehicle Charging Station (Fixed Charger) Market Forecast: Sales Value (in Million USD???) , 2026-2034

Figure 27: India: Electric Vehicle Charging Station (Level 1) Market: Sales Value (in Million USD???) , 2020 & 2025

Figure 28: India: Electric Vehicle Charging Station (Level 1) Market Forecast: Sales Value (in Million USD???) , 2026-2034

Figure 29: India: Electric Vehicle Charging Station (Level 2) Market: Sales Value (in Million USD???) , 2020 & 2025

Figure 30: India: Electric Vehicle Charging Station (Level 2) Market Forecast: Sales Value (in Million USD???) , 2026-2034

Figure 31: India: Electric Vehicle Charging Station (Level 3) Market: Sales Value (in Million USD???) , 2020 & 2025

Figure 32: India: Electric Vehicle Charging Station (Level 3) Market Forecast: Sales Value (in Million USD???) , 2026-2034

Figure 33: India: Electric Vehicle Charging Station (Combines Charging Station (CCS)) Market: Sales Value (in Million USD???) , 2020 & 2025

Figure 34: India: Electric Vehicle Charging Station (Combines Charging Station (CCS)) Market Forecast: Sales Value (in Million USD???) , 2026-2034

Figure 35: India: Electric Vehicle Charging Station (CHAdeMO) Market: Sales Value (in Million USD???) , 2020 & 2025

Figure 36: India: Electric Vehicle Charging Station (CHAdeMO) Market Forecast: Sales Value (in Million USD???) , 2026-2034

Figure 37: India: Electric Vehicle Charging Station (Normal Charging) Market: Sales Value (in Million USD???) , 2020 & 2025

Figure 38: India: Electric Vehicle Charging Station (Normal Charging) Market Forecast: Sales Value (in Million USD???) , 2026-2034

Figure 39: India: Electric Vehicle Charging Station (Tesla Supercharger) Market: Sales Value (in Million USD???) , 2020 & 2025

Figure 40: India: Electric Vehicle Charging Station (Tesla Supercharger) Market Forecast: Sales Value (in Million USD???) , 2026-2034

Figure 41: India: Electric Vehicle Charging Station (Type-2 (IEC 621196)) Market: Sales Value (in Million USD???) , 2020 & 2025

Figure 42: India: Electric Vehicle Charging Station (Type-2 (IEC 621196)) Market Forecast: Sales Value (in Million USD???) , 2026-2034

Figure 43: India: Electric Vehicle Charging Station (Other Connector Types) Market: Sales Value (in Million USD???) , 2020 & 2025

Figure 44: India: Electric Vehicle Charging Station (Other Connector Types) Market Forecast: Sales Value (in Million USD???) , 2026-2034

Figure 45: India: Electric Vehicle Charging Station (Residential) Market: Sales Value (in Million USD???) , 2020 & 2025

Figure 46: India: Electric Vehicle Charging Station (Residential) Market Forecast: Sales Value (in Million USD???) , 2026-2034

Figure 47: India: Electric Vehicle Charging Station (Commercial) Market: Sales Value (in Million USD???) , 2020 & 2025

Figure 48: India: Electric Vehicle Charging Station (Commercial) Market Forecast: Sales Value (in Million USD???) , 2026-2034

Figure 49: North India: Electric Vehicle Charging Station Market: Sales Value (in Million USD???) , 2020 & 2025

Figure 50: North India: Electric Vehicle Charging Station Market: Breakup by State (in %), 2025

Figure 51: North India: Electric Vehicle Charging Station Market Forecast: Sales Value (in Million USD???) , 2026-2034

Figure 52: West and Central India: Electric Vehicle Charging Station Market: Sales Value (in Million USD???) , 2020 & 2025

Figure 53: West and Central India: Electric Vehicle Charging Station Market: Breakup by State (in %), 2025

Figure 54: West and Central India: Electric Vehicle Charging Station Market Forecast: Sales Value (in Million USD???) , 2026-2034

Figure 55: South India: Electric Vehicle Charging Station Market: Sales Value (in Million USD???) , 2020 & 2025

Figure 56: South India: Electric Vehicle Charging Station Market: Breakup by State (in %), 2025

Figure 57: South India: Electric Vehicle Charging Station Market Forecast: Sales Value (in Million USD???) , 2026-2034

Figure 58: East India: Electric Vehicle Charging Station Market: Sales Value (in Million

USD???) , 2020 & 2025

Figure 59: East India: Electric Vehicle Charging Station Market: Breakup by State (in %), 2025

Figure 60: East India: Electric Vehicle Charging Station Market Forecast: Sales Value (in Million USD???) , 2026-2034

Figure 61: India: Electric Vehicle Charging Station Industry: SWOT Analysis

Figure 62: India: Electric Vehicle Charging Station Industry: Value Chain Analysis

Figure 63: India: Electric Vehicle Charging Station Industry: Porter's Five Forces Analysis

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