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# Charging as a Service Market by Charger Type (AC Charger, DC Charger), End Use (Private Charging Setup (Semi-Commercial), Public Charging Setup (Commercial)), Fleet service type (Company Vehicles & Motor Pools) - Global Forecast to 2035

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## Abstracts

The global Charging as a service market is projected to grow from USD 169.5 million in 2025 to USD 2,135.0 million in 2035, at a CAGR of 29.1%.

The Charging as a Service market is expanding as fleet operators prioritize decarbonization, cost efficiency, and operational optimization. Businesses are advancing EV adoption due to tough emissions rules and corporate net-zero goals, but high infrastructure costs and complexity remain barriers. Charging as a Service addresses these issues by removing upfront capital costs, providing predictable OPEX-based pricing, and combining hardware, software, maintenance, and upgrades into a single subscription. This concept improves cost effectiveness by helping fleets avoid unexpected repair expenditures while also benefiting from proactive maintenance and remote monitoring, resulting in reduced downtime. Further, scalability and flexibility enable fleets to increase charging capacity as acceptance rises, facilitating fleet electrification strategies while avoiding long-term infrastructure ownership costs. As a result, Charging as a Service is emerging as a preferred solution for logistics, public transport, and corporate fleets aiming for sustainable and cost-effective EV operations.

“By Charger Type, AC Charger segment is expected to hold a significant share of Charging as a Service market during the forecast period.”

AC charger segment is expected to be the largest market over the forecast period compared to DC chargers, driven by lower installation costs, ease of deployment, and

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suitability for residential and commercial settings. Unlike DC charger AC Chargers require significant infrastructure upgrades and high-power connections, AC chargers are more affordable and can be integrated into existing electrical grids with minimal modifications. Their widespread adoption is further supported by strategic partnerships, such as the partnership between EV Candi and SunFuel in 2024 to expand AC charging networks across residential and commercial properties. For instance, EV Connect's EV Charging-as-a-Service (EV CaaS) offers Level 2 (AC) charging under a monthly subscription model (starting at USD 100 per port), bundling equipment, installation, software, and maintenance. The service includes certified Level 2 chargers (Powercharge, EVoCharge, BTC), remote monitoring, automated alerts, and real-time performance management, ensuring seamless operation. Targeting businesses, fleets, and workplaces, it minimizes upfront costs, offers scalability, and keeps stations updated with firmware upgrades and proactive maintenance. The demand for AC chargers in the Charging as a Service market is increasing due to their cost-effectiveness, ease of installation, and feasibility for long-duration charging. AC chargers, especially Level 2 chargers, are widely adopted in residential complexes, workplaces, retail locations, and fleet depots, where vehicles remain parked for extended periods. Companies such as Blink Charging, ChargePoint, and Wallbox are expanding these expanded their AC charging networks across shopping malls, office buildings, and apartment complexes. These chargers offer cost-efficient and scalable charging solutions. AC chargers are preferred in workplace charging programs in which the company offered by companies such as Tesla and Siemens, where employees can charge their vehicles during work hours, leveraging time-of-use pricing to reduce electricity costs. Moreover, the fleet operators, including Amazon and FedEx, are integrating AC charging for overnight fleet charging to optimize costs and grid efficiency. Although there is a growing need for DC fast chargers in high-turnover locations, AC charging remains the preferred choice for semi-public (semi-commercial) applications, given its lower infrastructure investment and operational flexibility.

"Europe is expected to be the second largest market during the forecast period."

Europe is expected to be the second-largest market during the forecast period. This growth rate can be attributed to the rapidly evolving ecosystem driven by infrastructure expansion and subscription-based models. Leading local charging service providers such as Allego, Wallbox, ChargePoint, Compleo, Blink, and Efacec are investing in new charging networks, high-power charging corridors, and innovative subscription plans to enhance accessibility. Engie offers turnkey EV charging solutions with no upfront investment, covering installation, maintenance, and energy management for businesses, municipalities, and fleets. Allego provides charging-as-a-service with zero

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capital expenditure, offering DC and ultra-fast charging along with smart network management for retail, corporate, and logistics hubs. ChargePoint's CPaaS model delivers subscription-based EV charging, including hardware, software, and fleet energy management for commercial real estate, workplaces, and hospitality. Blink Charging's BaaS plan features zero-cost installation and revenue-sharing models, bundling hardware, software, and maintenance for municipalities, property owners, and fleets. Companies such as Ionity and Plugsurfing are expanding roaming agreements which allows seamless access to multiple charging operators with a single subscription. The advancements in SaaS technology are facilitating the payment processing and eliminating the need for physical cards or apps. With growing regulatory support, European charging service providers are focusing on scalability of EV Charging infrastructure, seamless payment integration, and subscription-based flexibility to drive EV adoption and enhance user convenience.

In-depth interviews were conducted with CEOs, marketing directors, other innovation and technology directors, and executives from various key organizations operating in this market.

By Company Type: OEMs - 24%, Tier I - 67%, and Tier II & III- 9%,

By Designation: CXO - 33%, Directors - 52%, and Others - 15%

By Region: North America - 26%, Europe - 36%, and Asia Pacific - 38%

The Charging as a service market is dominated by major players including like ChargePoint, Inc. (US), Tesla (US), TGOOD Global Ltd. (China), ENGIE (France), and State Grid Corporation of China (China). These companies are expanding their operations in EV Charging infrastructure to strengthen their CaaS ecosystem.

Research Coverage:

The report covers the CaaS market, in terms of Charger Type (AC Charger, DC Charger), Fleet Service Type (Company Vehicles & Motor Pools, Delivery & Logistics, Passenger Fleets), End Use (Private/Semi-Public Charging Setup - Shared Apartment Spaces, Convenience Retail, Restaurants, Auto Dealerships/OEM Operated Charging Spaces, Business, Fleet Charging Space, Public Charging Setup), and Region (Asia Pacific, Europe, and North America). It covers the competitive landscape and company profiles of the major players in the charging as a service market ecosystem.

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The study also includes an in-depth competitive analysis of the key market players, along with their company profiles, key observations related to product and business offerings, recent developments, and key market strategies.

Key Benefits of Buying the Report:

The report will help market leaders/new entrants with information on the closest approximations of revenue and volume numbers for the overall charging as a service market and its subsegments.

This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies.

The report also helps stakeholders understand the market pulse and provides information on key market drivers, restraints, challenges, and opportunities.

The report also helps stakeholders understand the current and future pricing trends of charging as a service.

The report provides insight on the following pointers:

Analysis of key drivers (Growing EV Adoption, Government Initiatives, Collaboration of local companies with large CPOs, Public-private partnerships (PPPs) for Charging Infrastructure, Minimal upfront costs), restraints (Grid Capacity Constraints), opportunities (Multi-Unit Dwellings (MUDs) Charging Solutions, Integration of Renewable Sources, Corporate and fleet electrification), and challenges (Standardization & Protocols, Cybersecurity Risks).

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new service offerings in the charging as a service market.

Market Development: Comprehensive information about lucrative markets - the report analyses the charging as a service market across varied regions.

Market Diversification: Exhaustive information about new products & services,

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untapped geographies, recent developments, and investments in the charging as a service market.

Competitive Assessment: In-depth assessment of market ranking, growth strategies, and service offerings of leading players like ChargePoint, Inc. (US), Tesla (US), TGOOD Global Ltd. (China), ENGIE (France), and State Grid Corporation of China (China) among others in Charging as a Service market.

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