

CWIEME
BERLIN

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MESSE BERLIN



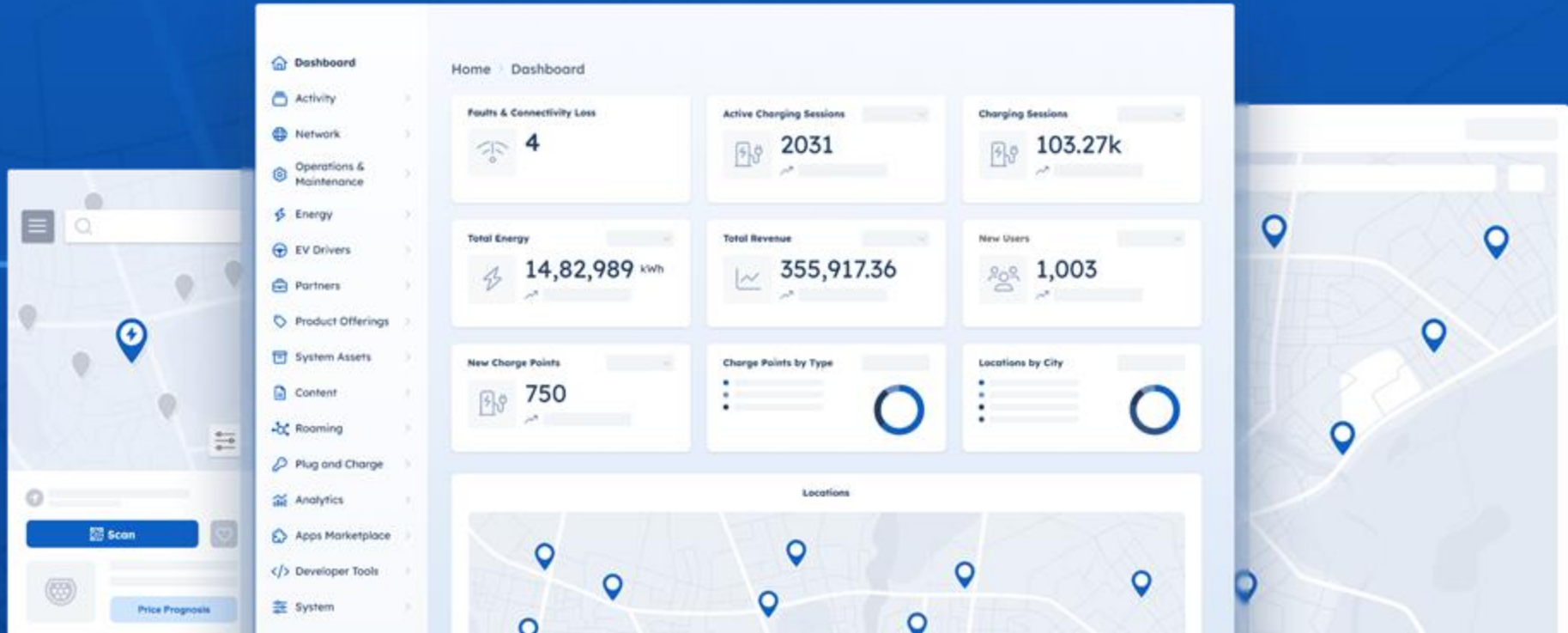
Market trends and policies accelerating EV charging worldwide

Charging towards zero emission

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Agenda for today

1. Intro

- EV charging industry overview in 2023
 - Key trends and highlights for 2024
-

2. Panel discussion topics

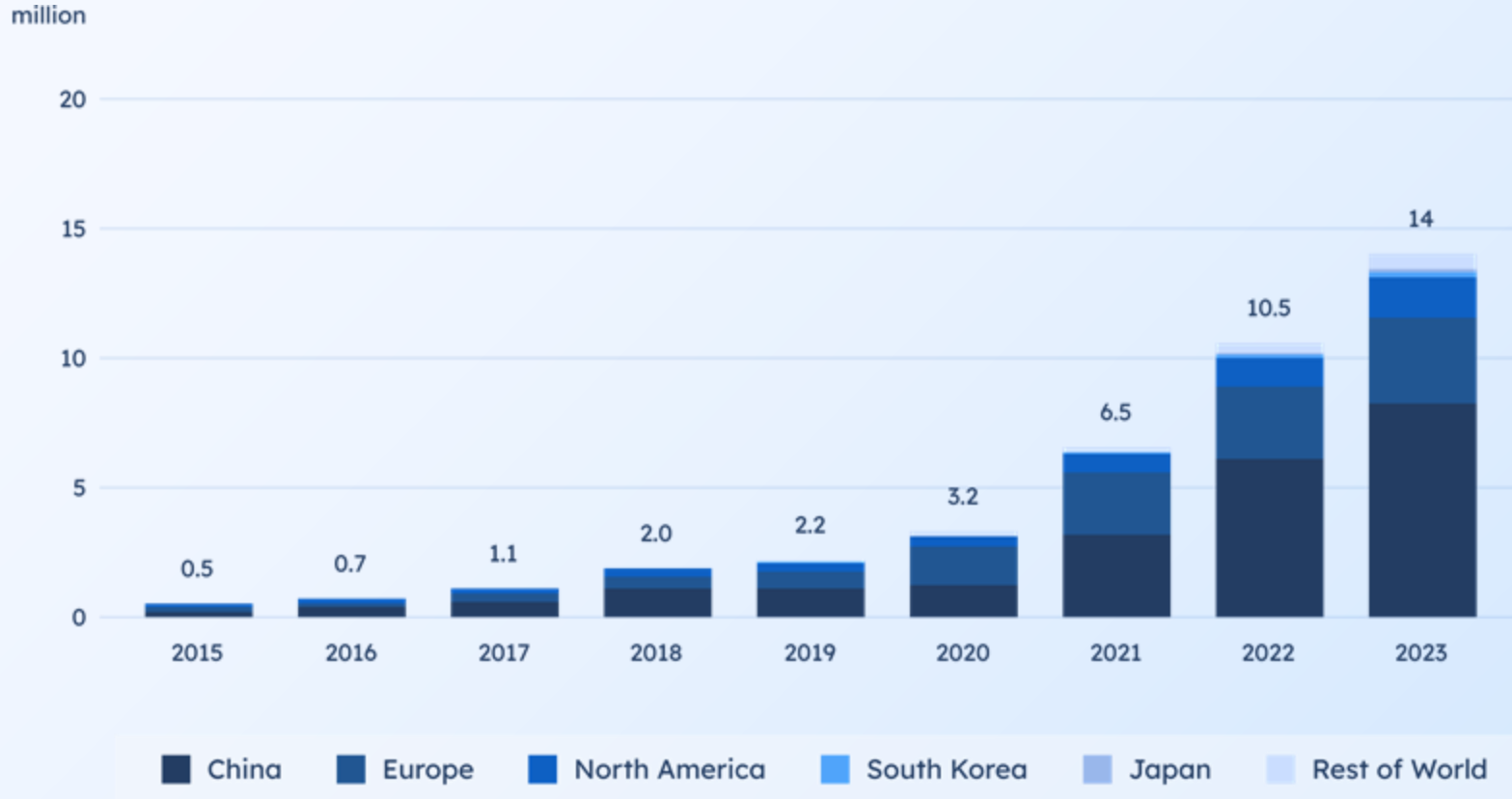
- Industry expectations and predictions
- Biggest challenges and opportunities
- Use cases with the biggest growth potential
- Q&A



A look back...

1

Global EV sales growth by regions



14M

Global Passenger EV sales in 2023

32.5%

EV share of passenger cars in China Q3 2023

17%

EV sales as part of total car sales in 2023

Source: [BloombergNEF](#)

The EV Charging Market in 2023

1.2M Public chargers installed worldwide in 2023

US

2.7B

Investments in EV charging in 2023

165 000

Public chargers available in 2023

EUROPE

5.3B

Investments in EV charging in 2023

756 000

Public chargers available in 2023

CHINA

19B

Investment in public EV charging in 2023

2.7M

Public chargers available in 2023

Global highlights and trends

- HPC hubs

- Major investments in eMobility

- Charging use cases evolving - truck, retail, etc

- NACS protocol and Tesla opening their network to other EVs

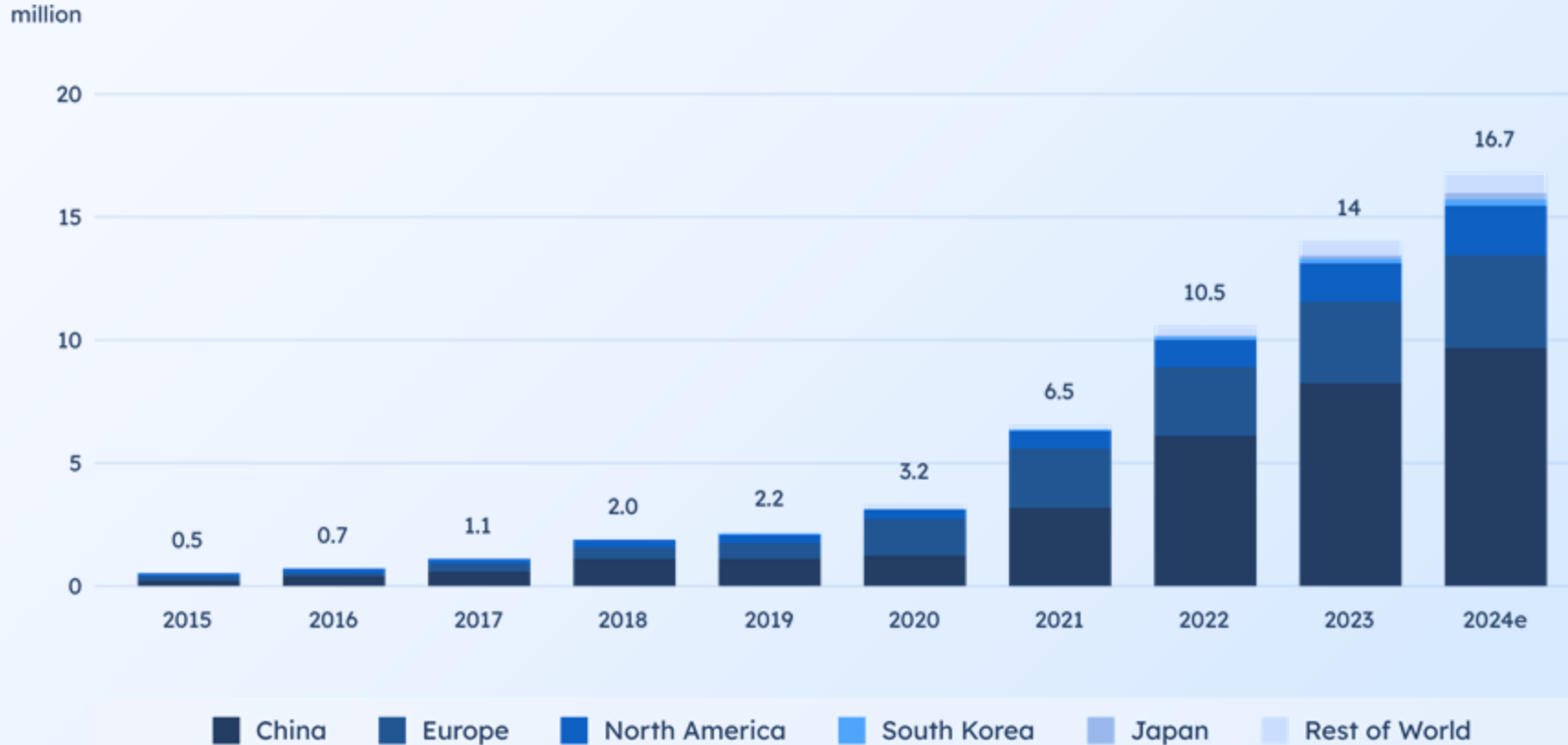
- China's NEV policy, Europe's "Fit for 55," and the Inflation Reduction Act in the US



What to expect in 2024?

2

Global EV sales growth by regions



16.7M

Global passenger EV sales in 2024

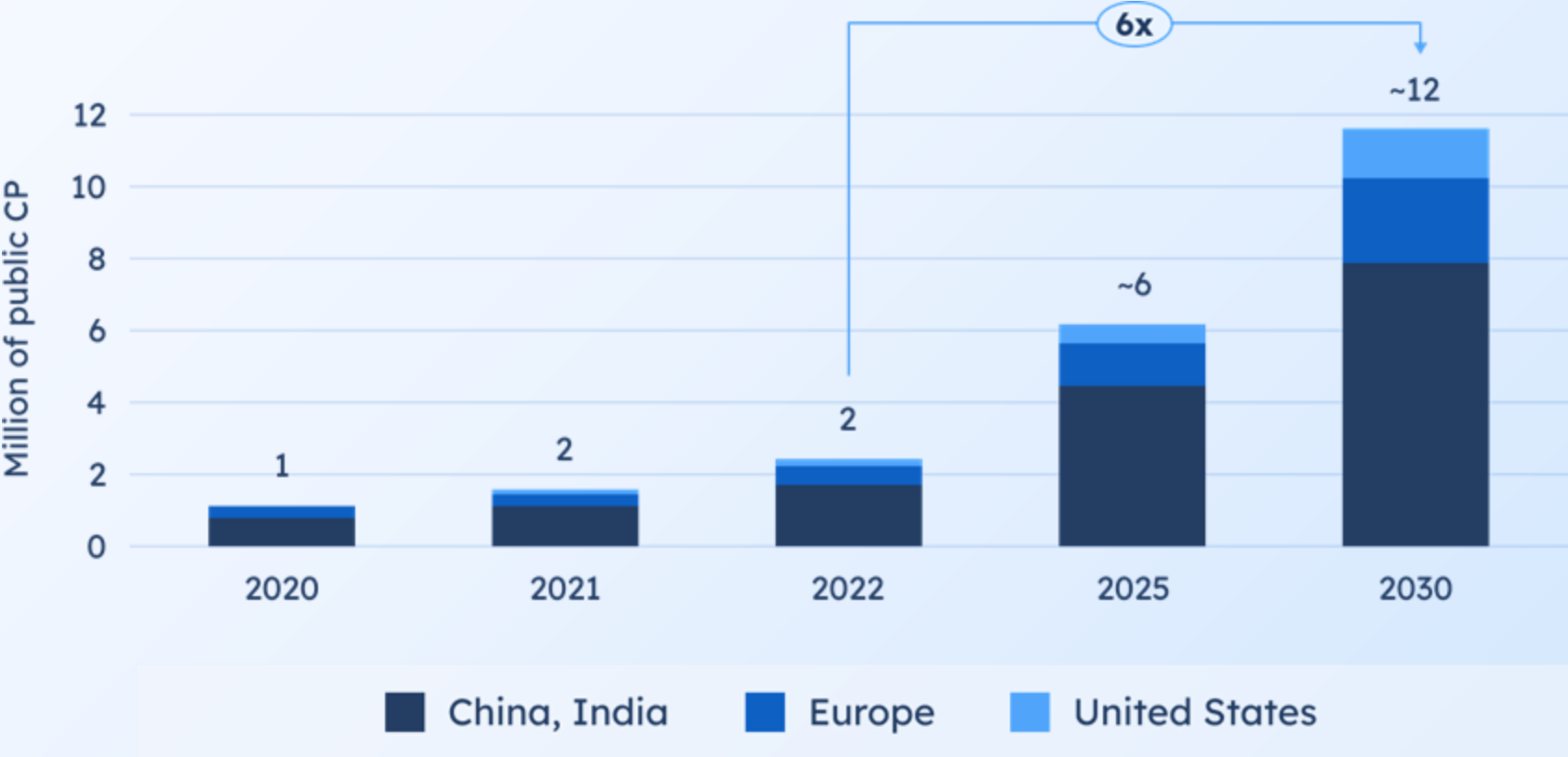
22%

Electric vehicles market growth in 2024

20%

EV sales as part of total car sales in 2023

Global charge points growth



1.6M
Connectors
to be added in 2024

75:25
Home charging to
Public charging ratio

Sources: [IEA, Future Market Insights & AFRY EVCI Model](#)

Key trends and highlights for 2024

- EV sales slowing down in percentage of growth
- Prepare for scale and consolidation
- Charger reliability and utilisation are critical
- Build customer experience beyond selling KWs
- Energy management
- Multi dwelling homes



The biggest untapped potential for charging infrastructure growth in 2024 and beyond...

- Infrastructure scalability

- Grid capacity and stability

- Regulatory compliance and standards

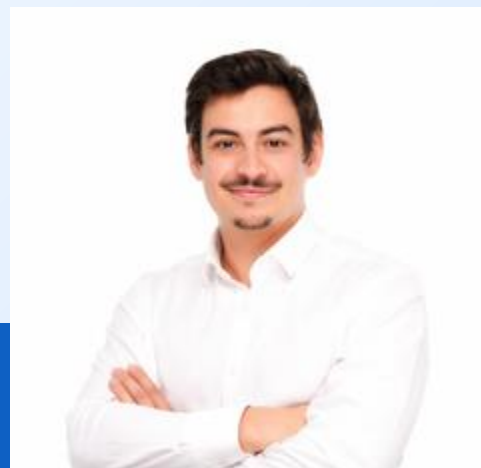
- EV driver experience and accessibility

- Financial viability and business models innovation

- Data security and privacy

- Technology advancements and EV adoption rates

Thank you for the attention



Petar Georgiev

