

STUDY

EV Charging Index 2026  
July 2026

# Currents of change

Global EV adoption  
and charging  
infrastructure:  
Findings and trends



Roland  
Berger



Global EV sales grew by more than 20% year on year in 2025. One in four new vehicles sold worldwide was an EV – battery electric or plug-in hybrid electric vehicle – and the total EV parc across our 34 focus countries surpassed 73 million vehicles – over 5% of all cars and vans on the road.

As markets gradually mature and near-term fluctuations become less telling, this edition of our EV Charging Index takes a shorter format than previous years, focusing on the structural trends most likely to shape the road ahead. The regional picture remains sharply divided. Asia-Pacific and Europe are accelerating, with EV sales penetration gaining ~7 percentage points year on year in each region, but North America and Japan both saw sales share fall due to policy headwinds and softer consumer confidence. Chinese OEMs remain a defining force across multiple dimensions: driving down vehicle costs, accelerating adoption in new markets, and reshaping competitive dynamics in Europe, Southeast Asia, and Turkey.

Public charge point additions slowed to ~1.1 million in 2025, down from 1.3 million in each of the two prior years. This reflects maturation in leading markets rather than retreat, as focus moves from buildout to performance. The shift toward fast charging is the more consequential trend: The share of charge points rated above 22 kW is rising across all regions, and ultra-fast (150 kW+) is the fastest-growing segment.

Electrification remains an uneven, early-stage transition. Asia and much of Europe are pulling ahead; North America is hesitant. Where the rest of the world lands will be a defining question for years to come.

# Global EV sales rise steadily, with strong growth in Europe and Asia-Pacific

Global EV sales grew by more than 20 % year on year in 2025 in our surveyed markets, driven by strong momentum in Europe and Asia-Pacific (APAC).

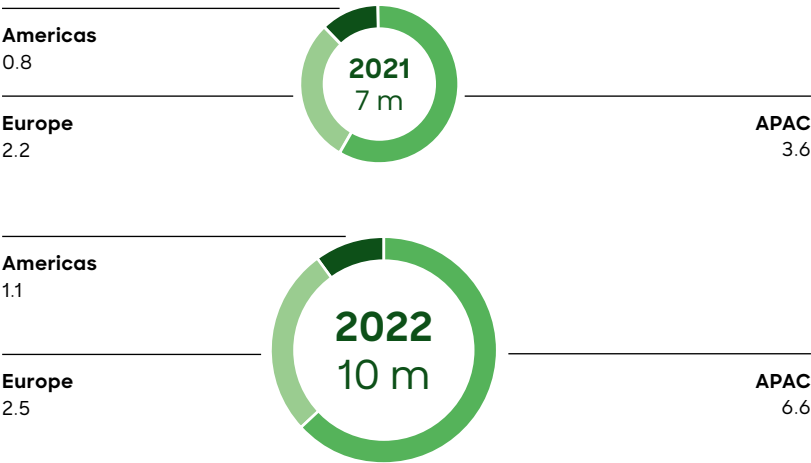
Europe's recovery stands out: After a sluggish 2024, the region came back strongly, with new EV sales rising by a third to 3.7 million. Asia-Pacific continued its relentless climb, reaching almost 15 million vehicles, up 21% year on year. China is the engine behind that number, accounting for around 9 in 10 EV sales in APAC.

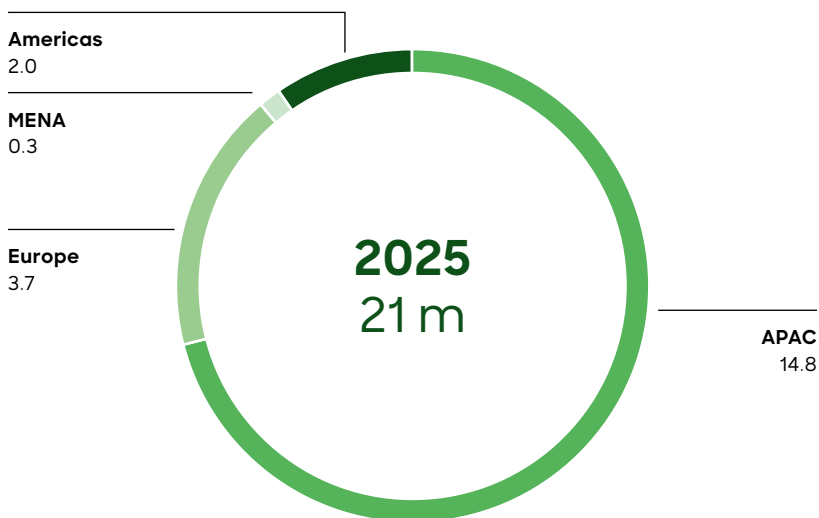
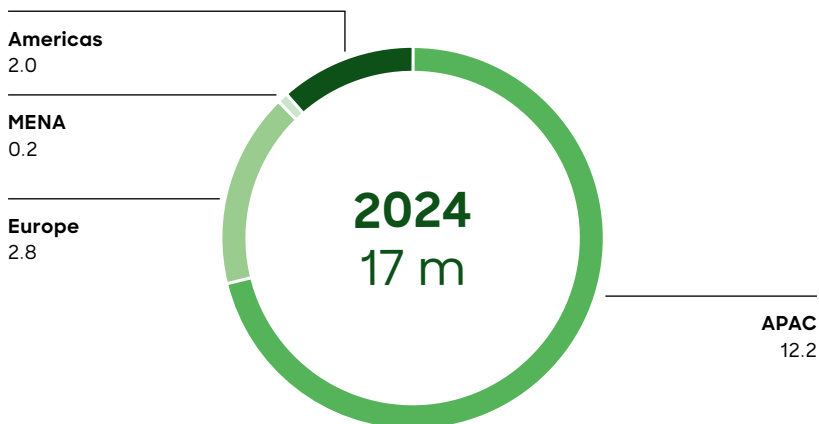
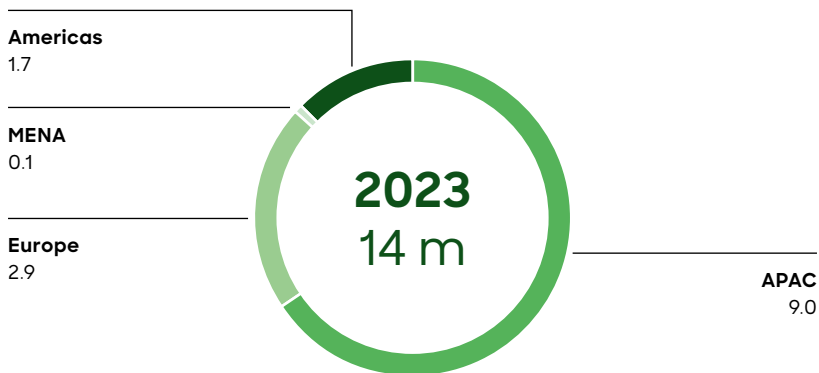
The Americas told a different story. Sales remained flat at around 2 million EV's, weighed down by policy uncertainty and subdued consumer appetite, particularly in the US and Canada.

In MENA, the market is smaller but moving in the right direction, with EV sales growing by around 50 % in 2025.

## Continued steady growth for global EV sales

EV sales volume [# million]





Source: Roland Berger based on data from EV-Volumes.com, EAFO, national statistics offices

# EV penetration surges in Asia and Europe, while North America loses ground

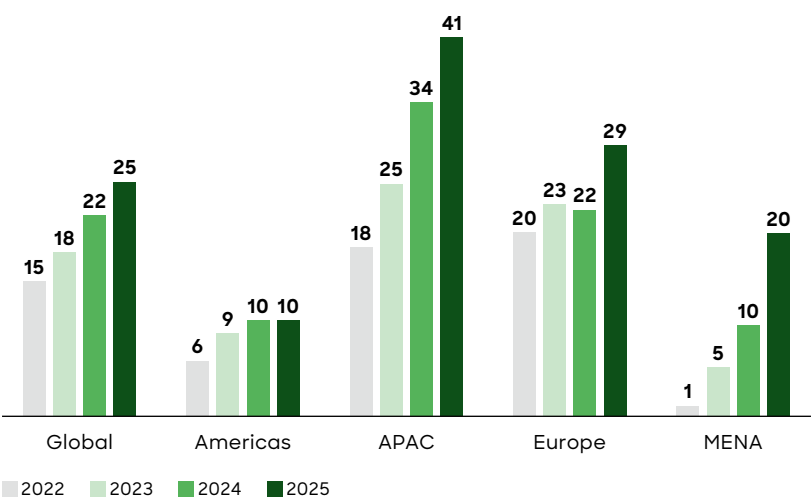
One in four new vehicles sold worldwide in 2025 was an EV. The regional picture, however, is sharply divided. In APAC, EVs accounted for more than 40 % of new vehicle sales; in Europe, the figure approached 30 %. Both regions gained around seven percentage points year on year, driven by supportive policy, a wider model range, and falling costs. Cheaper LFP batteries, growing competition from Chinese OEMs, and a shift toward mid-segment vehicles have all made EVs more accessible.

China continues its impressive electrification progress: in 2025, half of new cars and vans sold were EVs. In the Netherlands and Sweden, the share was around three in five. In MENA, the market is smaller but accelerating: Turkey posted strong growth, with domestic brand Togg joining Tesla and BYD in making a significant push.

North America and Japan moved in the opposite direction. Policy headwinds and cautious consumer sentiment pushed EV sales share below 2024 levels in the US and Canada. Japan saw its EV sales share slip from 3 % to 2 %.

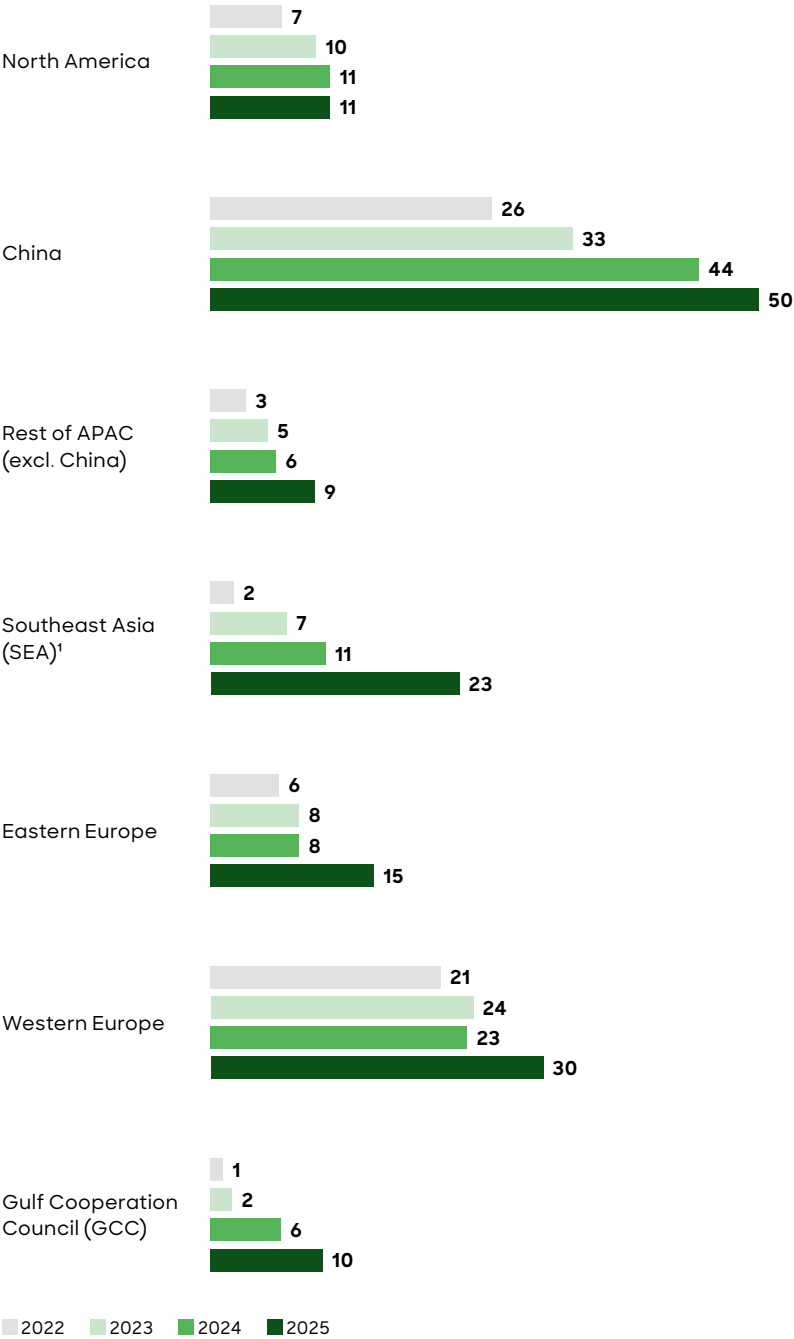
## APAC leads the way on EV sales penetration

EV sales penetration [%]



Source: Roland Berger based on data from EV-Volumes.com, EAFO, national statistics offices

**Europe accelerates, while China hits 50 % EV sales penetration**  
EV sales penetration [%]



<sup>1</sup> SEA is included in "Rest of APAC"

Source: Roland Berger based on data from EV-Volumes.com, EAFO, national statistics offices

# BEVs stay ahead, PHEVs regain momentum

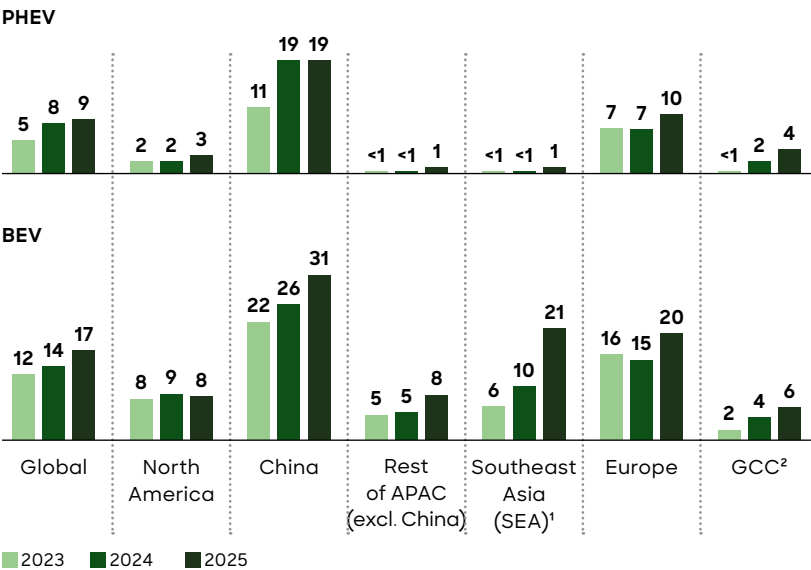
BEVs represented around two-thirds of new EV sales globally, in line with the historical range of 65-70%. Share grew most strongly in markets with supportive policies like tax exemptions and purchase subsidies, notably China, the Nordics, and Benelux. It has also risen rapidly over the past two to three years in markets where consumer sentiment, policy, and OEM presence all shifted in the same direction, including Southeast Asia and Turkey.

PHEVs reversed recent trends in both Europe and North America. In Europe, PHEV share of new EV sales rose sharply, partly because Chinese brands, which captured roughly 20% of European PHEV sales, were exempt from the EU tariffs applicable to Chinese BEVs.

In China, the PHEV sales share held steady at 19%. In Western Europe, while the overall PHEV share rose from 7% to 10%, markets such as Belgium and France saw this metric fall following policy changes including the withdrawal of PHEV tax incentives.

## Europe and APAC lead EV penetration growth

BEV and PHEV sales penetration [%]

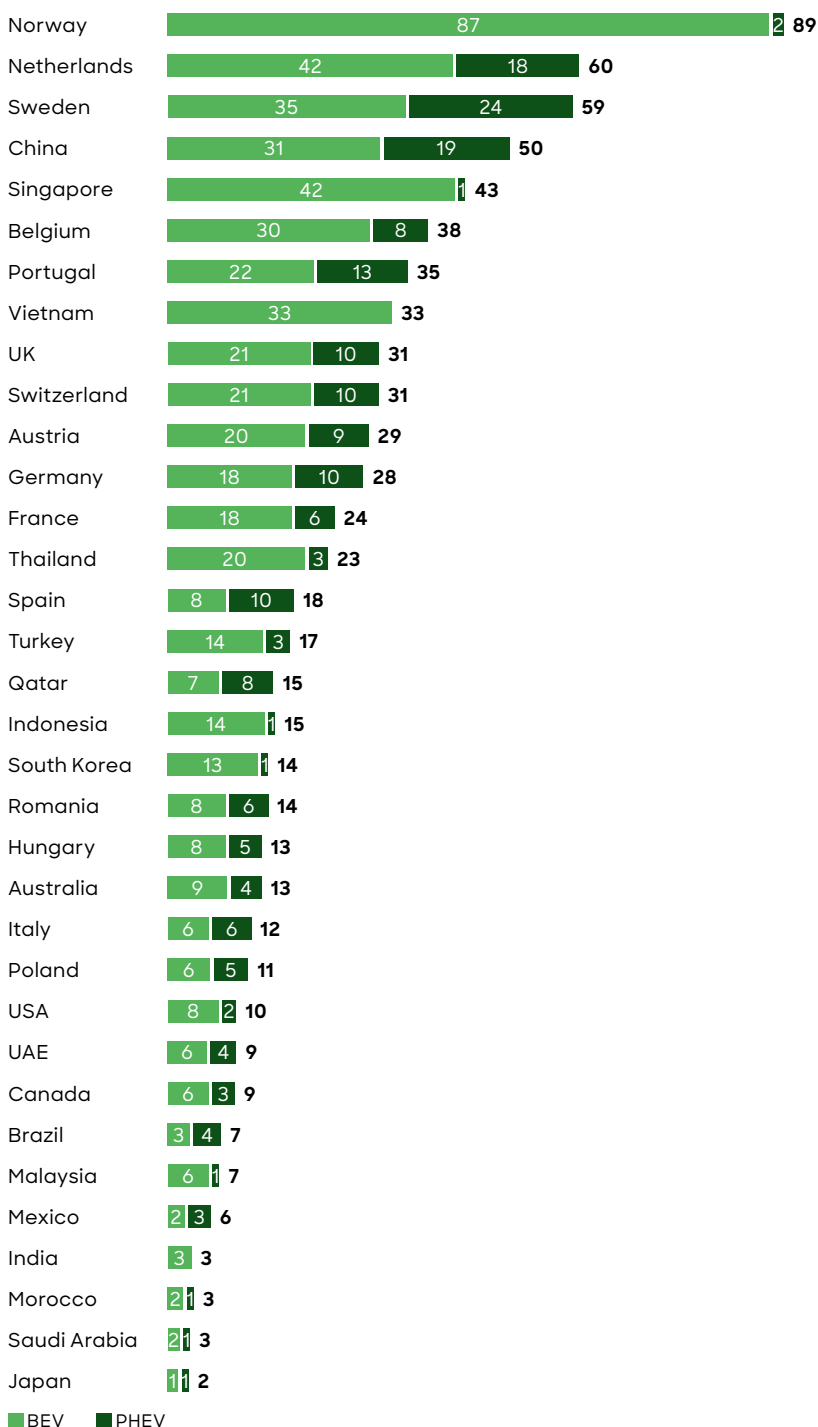


1 SEA is included in "Rest of APAC", 2 Gulf Cooperation Council (GCC)

Source: Roland Berger based on data from EV-Volumes.com, EAFO, national statistics offices

## EV sales penetration rates varied hugely in 2025

EV sales penetration, 2025 [%]



Source: Roland Berger based on data from EV-Volumes.com, EAFO, national statistics offices

# The EV parc continues to grow strongly in most markets

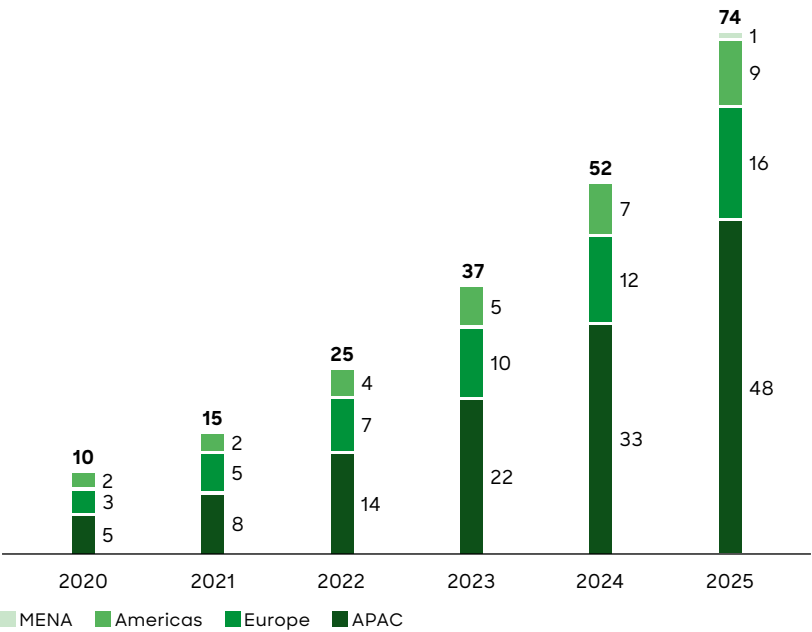
Maturing markets will lead to year on year growth rates gradually decreasing, but the global EV parc continues to show strong momentum. In 2025, it increased by 40 % for the second consecutive year and now totals 73 million vehicles for our 34 included markets. EVs now represent more than 5 % of all cars and vans on the road, up from 52 million and 4 % at the end of 2024.

Parc penetration remains highest in Asia-Pacific (8 %) and Europe (5 %), well above the Americas (2 %) and MENA (1 %), which both saw minimal increases in 2025.

Western Europe is home to the countries with the highest parc penetration rates: In Norway, more than one in three vehicles are now electric, in Sweden it's 15 %, while Belgium and the Netherlands each crossed the 10 % mark in 2025. Outside this region, only China can compete – its rapidly rising parc penetration is now at 13 %.

## Consistent growth in EV parc volume

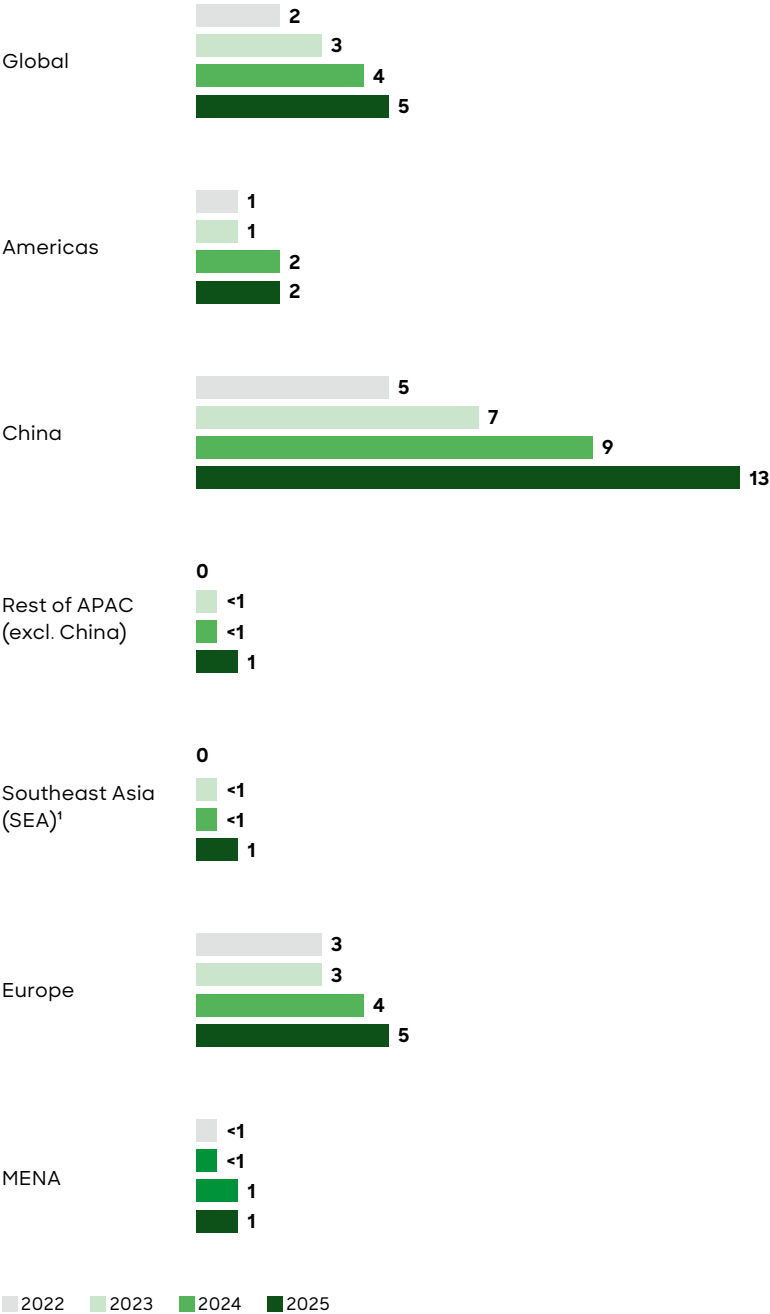
EV parc volume [# million]



Source: Roland Berger based on data from Mobility Global, EAFO, Euromonitor, IEA, national statistics offices

# Europe and APAC lead the way for EV parc penetration while China accelerates further

EV parc penetration [%]



1 SEA is included in "Rest of APAC"

Source: Roland Berger based on data from Mobility Global, EAFO, Euromonitor, IEA, national statistics offices

# Public charge point growth slows slightly as maturity increases

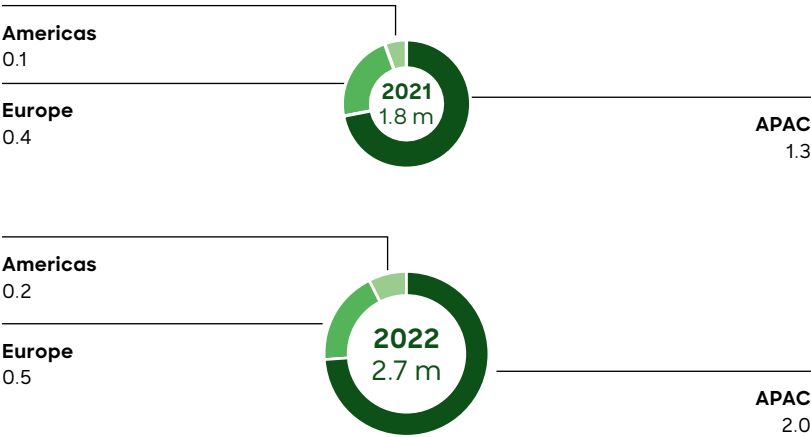
Public charge point rollout continued in 2025, though at a slightly slower pace than the two preceding years, particularly in China and much of Europe. Across our focus countries, approximately 1.1 million new public charge points were added, down from just under 1.3 million in 2024 and just over 1.3 million in 2023.

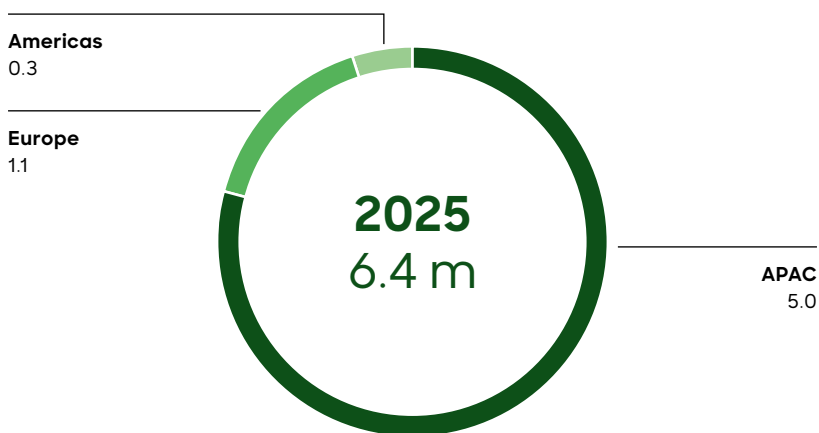
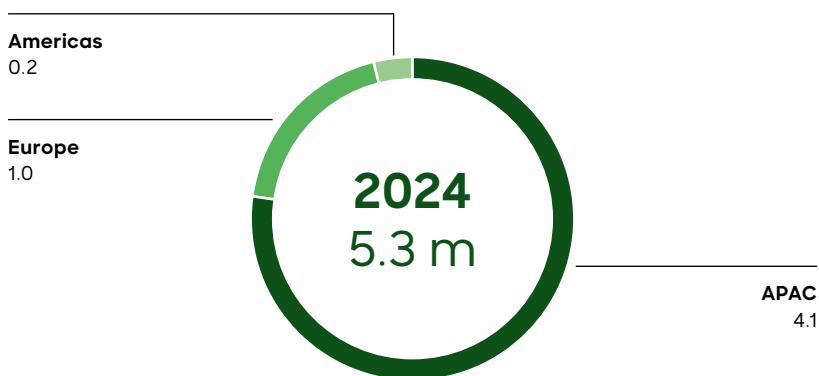
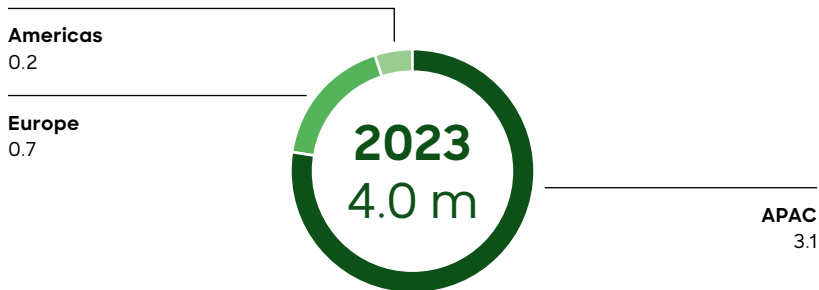
This might seem counterintuitive as the number of EVs entering the vehicle parc continues to rise but is likely the result of a maturing sector. In many markets, governments and operators built out public networks ahead of demand to reduce barriers to EV adoption. As critical mass has been reached, rollout is settling into a steadier pace while utilization catches up. In last year's EV Charging Index, three-quarters of survey respondents felt public charging was becoming more convenient, suggesting this work is paying off.

However, the buildout pattern varies geographically: In less mature markets across Eastern Europe and Southeast Asia, deployment accelerated. In the US, where gaps in public charging coverage are well documented, charge point additions also picked up in 2025, even as new EV sales growth slowed.

## Public charge point growth remains steady<sup>1</sup>

Public CP installed base [# million]





1 MENA volumes are less than 100k

Source: Roland Berger based on data from Eco-Movement, EAFO, IEA, Euromonitor, national statistics offices

# Fast charging gains ground across all regions

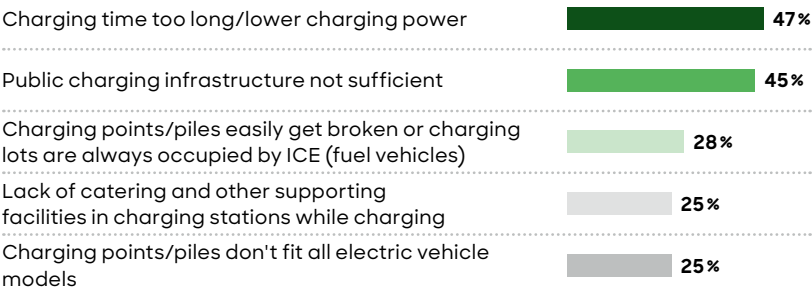
A further reason for the apparent slowdown in headline numbers is the ongoing shift toward fast charging infrastructure. Fast chargers have higher power capacity and are typically deployed in smaller numbers than slow chargers, since higher energy throughput means fewer charge points are needed to serve the same demand.

The share of public charge points rated above 22 kW continued to increase across all regions, though coverage varies widely. China is approaching 50 %, and much of Southeast Asia sits even higher. Meanwhile, just over 20 % of Europe's public charge points are fast, there is with significant variation within the region. Spain, Portugal, Poland, the UK, and Norway all exceed 25 %, partly because high rates of home charging reduce the need for slow public infrastructure in residential areas. At the other end, the Netherlands sits as low as 5 %, reflecting its early and extensive rollout of AC slow charging networks and grid constraints that limit higher power deployment in some locations.

Five years of EV Charging Index user surveys point in the same direction: Drivers want more public chargers, but specifically faster ones. Charge point operators are responding. Within the growing base of fast DC infrastructure, ultra-fast charge points (150 kW+) are the fastest-growing segment. In Europe, more than 50 % of fast charge points are now ultra-fast capable, up from around 25 % five years ago. Slow AC and mid-power DC charging retain important roles as more cost-effective options, particularly where dwell times are longer or grid capacity is limited.

## What people want: more, and faster, public chargers

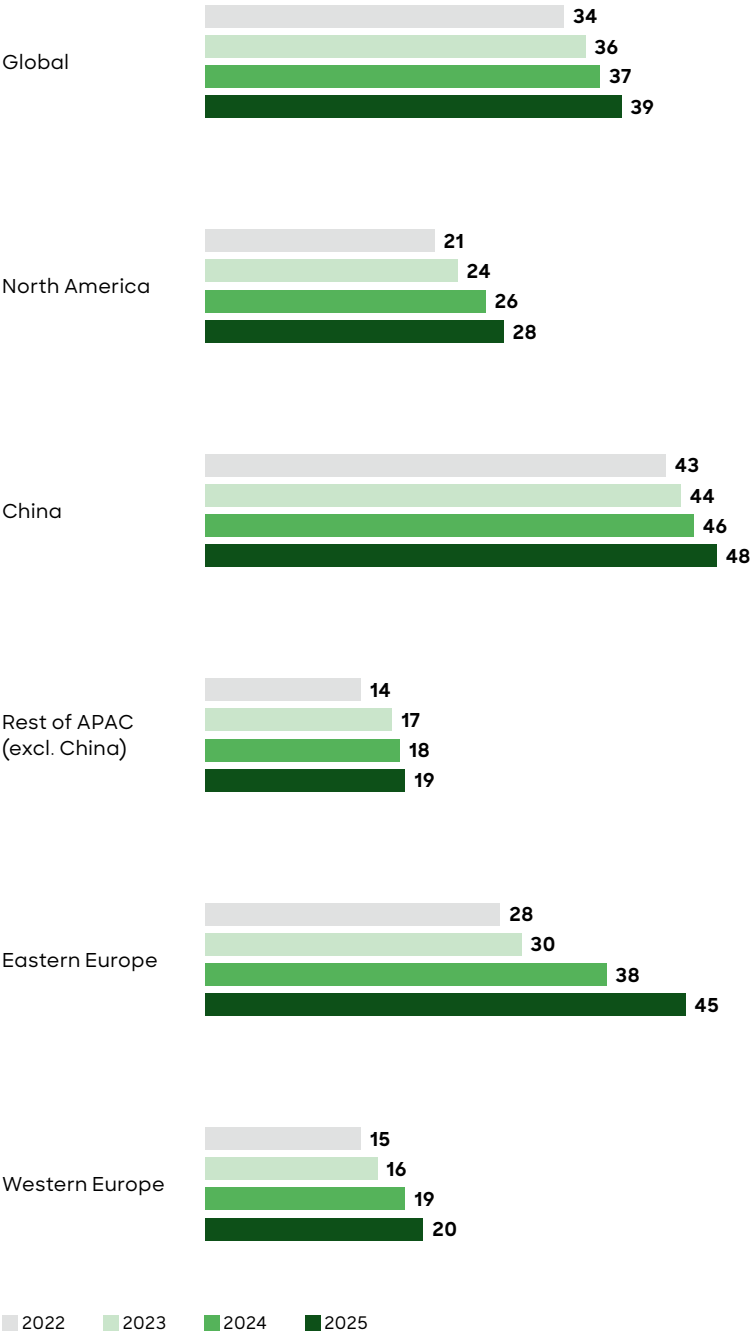
**Answers to: Based on your overall charging experience, which of the following are less satisfactory to you? [Multiple answers possible]**



Source: Roland Berger based on data from Potloc, Roland Berger EV Charging Index survey 2025

# Fast charge point ratio ticks upwards - China's public charging network gets ever faster

Fast CP share in total public CP installed base [%]



Source: Roland Berger based on data from Eco-Movement, EAFO, IEA, Euromonitor, national statistics offices

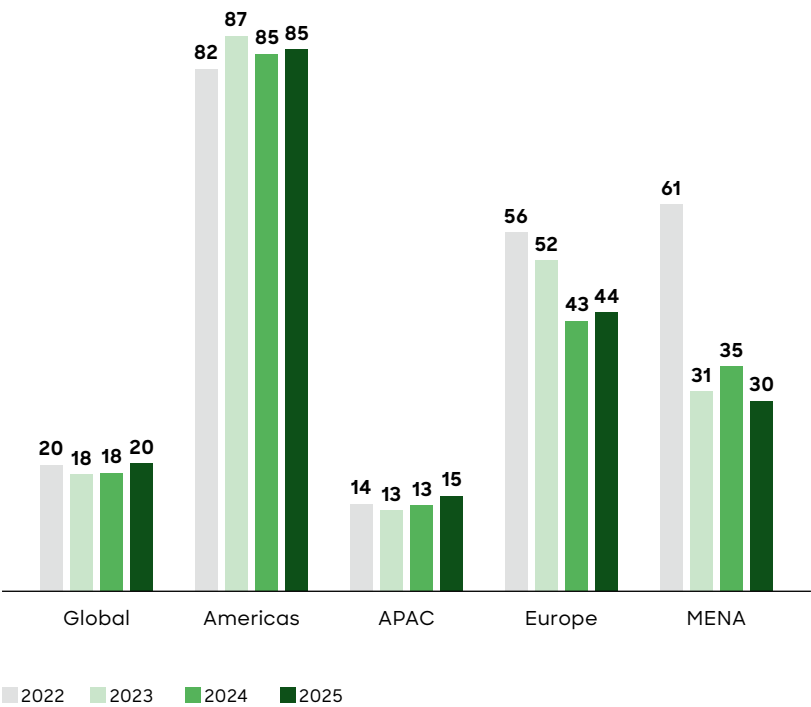
# Charge point demand is outpacing supply

Across most markets, the ratio of EVs on the road to installed public charge points edged up in 2025, as did the ratio of BEVs to fast charge points. Both trends are positive signals for charge point operators: Demand is growing faster than supply.

In some markets, however, the current ratio remains well below what is considered economically sustainable. Western Europe averages around 45 BEVs per fast charge point today, against a medium-term target widely expected to exceed 100. Requirements will vary by market depending on EV use patterns and charging behavior, but the direction of travel is clear. Closing that gap will take several years and will depend on fast charging rollout keeping pace with continued BEV adoption.

## The Americas lags in fast charge point installation

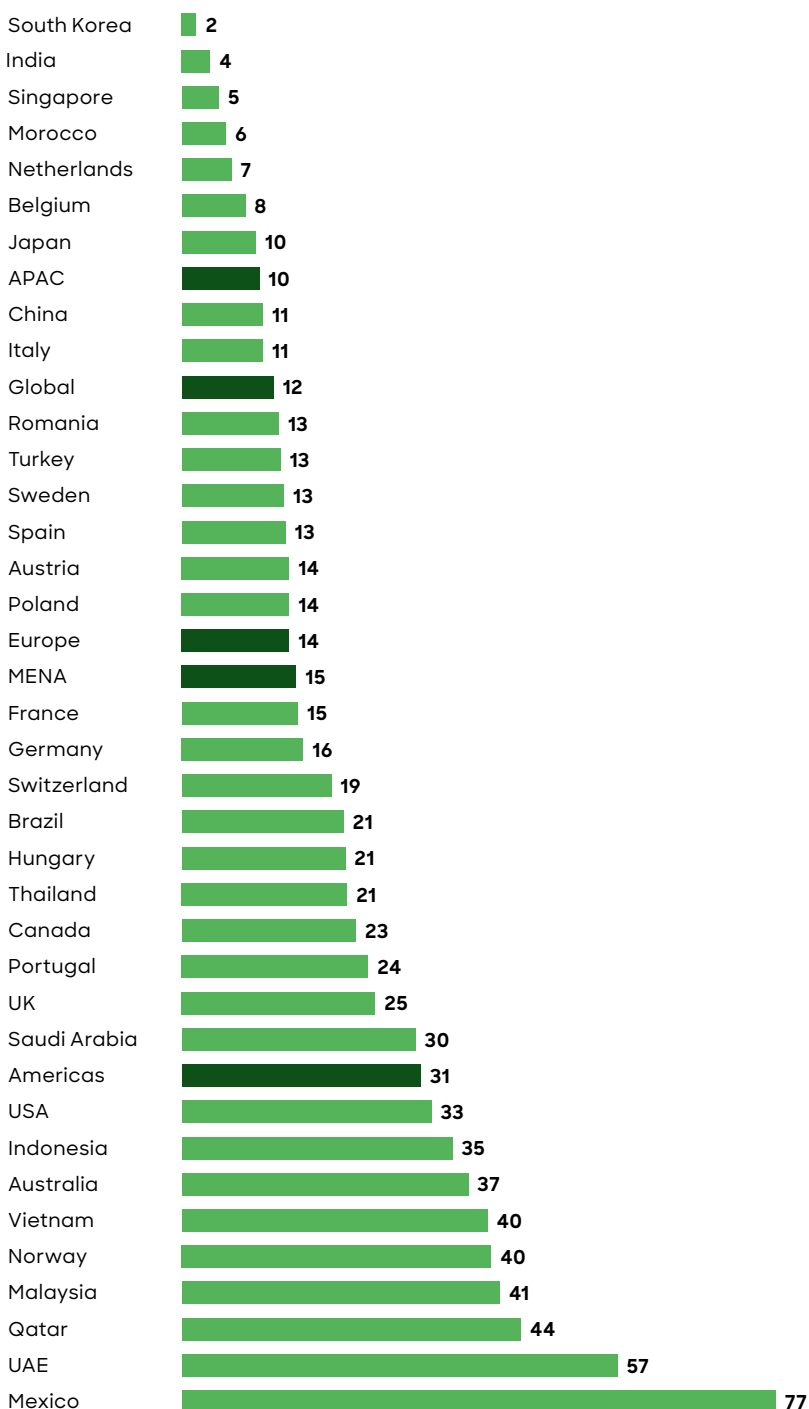
BEVs on the road per installed public CP [#]



Source: Roland Berger based on data from Mobility Global, EAFO, Euromonitor, IEA, national statistics offices

## Growth in EV numbers outpaces charge point installation

EVs on the road per installed public CP, 2025 [#]



Source: Roland Berger based on data from Mobility Global, Euromonitor, Eco-Movement, EAFO, IEA, Euromonitor, national statistics offices

# Five key takeaways



## **Electrification is advancing but unevenly.**

One in four new vehicles sold globally was an EV in 2025, yet the gap between leading and lagging markets is widening. Asia and Europe are accelerating; North America is pulling back. The rest of the world is still making its choice.



## **China sets the tempo.**

Having crossed the 50 % sales penetration threshold, China accounts for the vast majority of APAC EV volumes and is reshaping global dynamics through its OEMs, battery technology, and cost curve.



## **PHEVs defy predicted decline.**

PHEVs unexpectedly increased their sales share in North America, MENA, and APAC in 2025. Europe saw the most noteworthy increase in PHEV sales share, partly because Chinese brands were not subject to the additional anti-subsidy EU tariffs that apply to their BEV exports.



## **Charging infrastructure is maturing, not stalling.**

Fewer new charge points were added in 2025 than in prior years, but this reflects markets reaching critical mass and the shift toward fast and ultra-fast charging.

# Methodology

## EV Charging Index 2026: What's changed

As markets gradually mature and near-term fluctuations become less telling, this edition of our EV Charging Index takes a shorter format than previous years. Please see our 2025 Index for more detailed insights into global EV user behavior, as well as EV adoption and charging infrastructure development. And keep an eye out for next year's Index, which will again feature our in-depth global EV user survey.



In this study we refer to:

- **BEV** for battery electric vehicle
- **PHEV** for plug-in hybrid
- **EV** for electric vehicle (including BEV and PHEV).
- These three definitions encompass **passenger cars** and **light commercial vehicles** (vans)



This analysis integrates multiple data inputs, including global and regional sources such as Eco-Movement, Mobility Global, EV-Volumes, Euromonitor, EAFO, IEA, and national statistics offices, as well as insights gained from Roland Berger's project experience and interviews with industry experts. The "EV Charging Index survey 2025" refers to the survey we conducted in 2025 for edition 6; please refer to it for more on the methodology.

# Index

## EV Charging Index 2025 country and region grouping list

| Country     | Top-level region | Country groupings used in the index |
|-------------|------------------|-------------------------------------|
| Australia   | APAC             | Rest of APAC (excl. China)          |
| Austria     | Europe           | Western Europe                      |
| Belgium     | Europe           | Western Europe                      |
| Brazil      | Americas         | Central & LATAM                     |
| Canada      | Americas         | North America or NAFTA              |
| China       | APAC             | –                                   |
| France      | Europe           | Western Europe                      |
| Germany     | Europe           | Western Europe                      |
| Hungary     | Europe           | Eastern Europe                      |
| India       | APAC             | Rest of APAC (excl. China)          |
| Indonesia   | APAC             | Rest of APAC (excl. China)          |
| Italy       | Europe           | Western Europe                      |
| Japan       | APAC             | Rest of APAC (excl. China)          |
| Malaysia    | APAC             | Rest of APAC (excl. China)          |
| Mexico      | Americas         | North America or NAFTA              |
| Morocco     | MENA             | –                                   |
| Netherlands | Europe           | Western Europe                      |

| Country      | Top-level region | Country groupings used in the index |
|--------------|------------------|-------------------------------------|
| Norway       | Europe           | Western Europe or Nordics           |
| Portugal     | Europe           | Western Europe                      |
| Qatar        | MENA             | GCC                                 |
| Romania      | Europe           | Eastern Europe                      |
| Saudi Arabia | MENA             | GCC                                 |
| Singapore    | APAC             | Rest of APAC (excl. China)          |
| South Korea  | APAC             | Rest of APAC (excl. China)          |
| Spain        | Europe           | Western Europe                      |
| Sweden       | Europe           | Western Europe or Nordics           |
| Switzerland  | Europe           | Western Europe                      |
| Thailand     | APAC             | Rest of APAC (excl. China)          |
| Turkey       | MENA             | –                                   |
| UAE          | MENA             | GCC                                 |
| UK           | Europe           | Western Europe                      |
| USA          | Americas         | North America or NAFTA              |
| Vietnam      | APAC             | Rest of APAC (excl. China)          |

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