North korea electric vehicle infrastructure

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Public charging expands despite pandemic-related slowdown in construction

As EV markets swell, access to public charging will need to expand as well. Today most EV charging takes place at residences and workplaces. Consumers will increasingly expect the same services, simplicity and autonomy for EVs as they do for conventional vehicles.

Publicly accessible chargers worldwide approached 1.8million charging points1 in 2021, of which a third were fast chargers.2 Nearly 500000chargers were installed in 2021, which is more than the total number of public chargers available in 2017. The number of publicly accessible chargers was up by 37% in 2021, which is lower than the growth rate in 2020 (45%) and pre-pandemic roll out rates. The average annual growth rate ranked almost 50% between 2015 and 2019. In 2021, fast charging increased slightly more than in 2020 (48% compared with 43%) and slow charging much slower (33% compard with 46%).

As in previous years, China is the global leader in number of publicly available chargers. It counts about 85% of the world"s fast chargers and 55% of slow chargers. This reflects China"s demonstrated leadership in the EV sector as well as its very densely populated urban characteristics.

Public slow charger installations are on the upswing

In 2021, installed slow chargers in China increased by 35% to about 680000publicly accessible units, more than four times the number of slow chargers available in 2018. However, growth has been much slower in the pandemic period than in previous years. Between 2015 and 2020, the average annual growth rate was over 60%.

Europe ranks second with over 300000 slow chargers in 2021, a 30% year-on-year increase. The Netherlands leads in Europe with more than 80000 slow chargers, followed by 50000in France, 40000in Germany, 30000in the United Kingdom, 20 000 in Italy and just over 12000in both Norway and Sweden. The stock of slow chargers in the United States increased by 12% to 92000 in 2021, the slowest increase among major markets. In Korea, it increased by nearly 70% to over 90000.

Public fast charging availability accelerates

Publicly accessible fast chargers facilitate longer journeys. As they are increasingly deployed, they will enable longer trips, encourage consumers that lack access to private charging to purchase an EV, and tackle range anxiety as a barrier for EV adoption.

In contrast to 2020, when Europe"s fast charging installations significantly outpaced slow charging ones,

installations were about the same in 2021. The number of public fast chargers in Europe was up by over 30% to nearly 50000units. This includes 9 200 public fast chargers in Germany, 7700in the United Kingdom, 6700in Norway, 4500in France, 2600in Spain andin the Netherlands. The United States counts about 22000 fast chargers, of which nearly 60% are Tesla superchargers. Korea has 15000fast chargers, 50% more than in 2020.

Number of EVs per charger depends on several factors

In 2021, sales more than doubled to bring the total fleet of electric cars to about 16.5million, a tripling relative to the stock in 2018. Meanwhile, the number of publicly available charging points also tripled to about 1.8million. Current momentum in EV sales can only be sustained if ever larger shares of the population have access to convenient and affordable charging infrastructure, both publicly available and private chargers at residences and workplaces, among other destinations. Governments will have to continue facilitating investment and minimising barriers to the roll-out of charging infrastructure.

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