

# Market Assessment

## Global EV DC Charging Infrastructure

### Quick overview

With the global EV DC charging industry moving towards one standard, US and European automotive OEMs manufacturers adopting CCS charging standard, our client, a leading Battery Charging solution provider, wanted to understand the global DC charging technologies .

### Client success

The support and insights FutureBridge delivered, helped our client in understanding global EV DC charging infrastructure and share of each segment in terms power rating, charging standard, application, etc. Our analysis answered several of our client's critical business questions including:

Despite regular improvements in EV charging technology, charging infrastructure still suffers from data inconsistency and lack of consistent standards in many countries. How can an EV charging player minimise such challenges?

- What is the historical and current market size of global EV DC charging technologies?
- What are the key market trends, growth drivers, regulations and challenges?
- Who are the key domestic and international market players? What is the pricing for DC charging station for each of the key players? What is the market share of each key player?
- What is the growth outlook of global EV DC charging by each technology?

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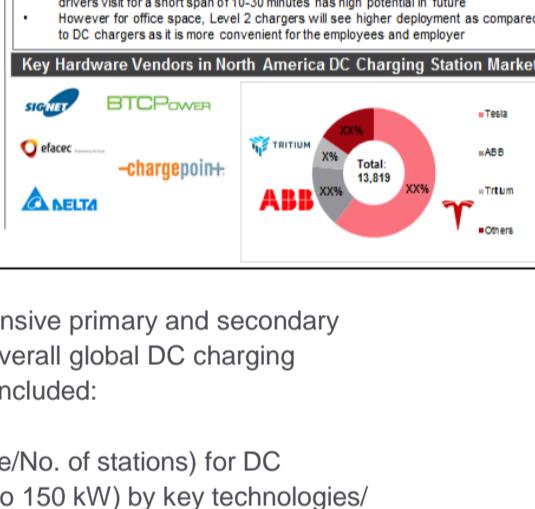
#### Trends in North America Market

Public Charging application will dominate the DC charging station market in North America

Increasing interest in DC charging station by key players		
Key Players	Position	Number of DCFC Stations
Blink	Hardware vendor, Network provider, Owner, Operator	XXX
Chargepoint	Hardware vendor, Network provider	XXX
EVgo	Owner, Operator	XXX
Electrify America	Owner, Operator	XXX
EV Connect	Network provider	XXX
Greenlots	Network provider	XXX
Tesla	Hardware vendor, Network provider, Owner, Operator	XXX

Note: As of June 2020

"Fleet Trucks and buses have high potential in future because it's more suitable and has fixed short route travel. So school buses, public transport buses has higher chance of moving to electric buses in future. Home DC charging segments is limited due to high cost as compared to Level 2 charging."



Source: Primary Interviews, Desktop Research, and FB Analysis

FutureBridge conducted extensive primary and secondary research to understand the overall global DC charging infrastructure. Our research included:

- Current market size (Value/No. of stations) for DC Charging Station (50 kW to 150 kW) by key technologies/ standards
- Historical and future growth of the market
- Prevalent standards (CCS, CCS2, CHAdeMO, Tesla) in different geographies
- Value chain analysis for DC charging station market
- New technologies, product features developed in DC charging market
- Competitor analysis in DC charging station space on various parameters

FutureBridge further analyzed the different government subsidies/incentives available for DC charging stations.

Also, FutureBridge identified the potential geographies and end segments for DC charging stations and also the market potential based on current market size, margin, competition and future potential.

### About FutureBridge

FutureBridge tracks from 1 to 25 years, how industries and sectors will evolve, develop, and innovate.

We keep your business ahead of the technology curve. Propel your growth, identify new opportunities, markets, and business models. We can answer your key strategic questions. Facilitate focused, tailored solutions and partnerships using our platforms and programs, with access to global information ecosystems and key industry players for their insights and expertise.