

# MOBILITY MARKET RADAR GERMANY

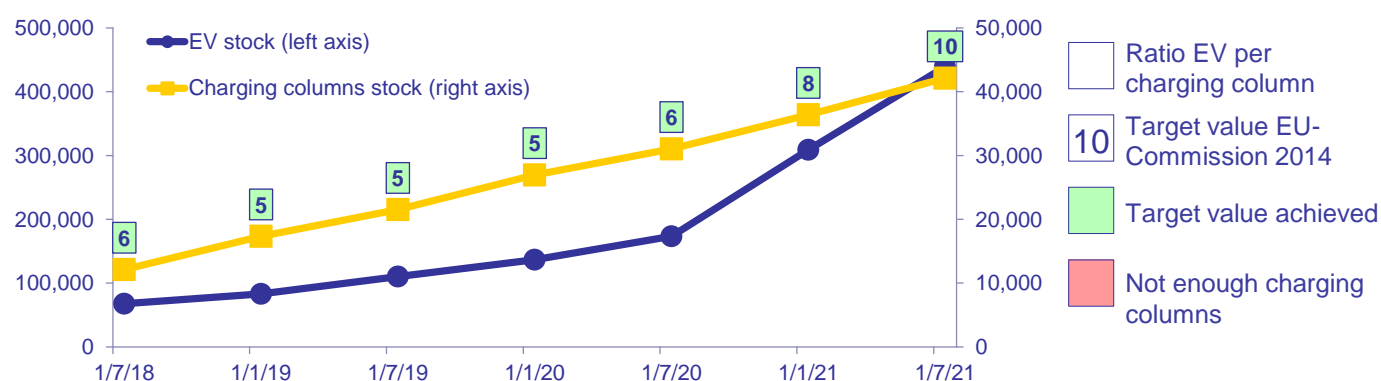


05.11.2021

## KEY FACTS

- High numbers of electric vehicle registrations since the middle of last year have caused fewer free spaces at public charging points. However, Germany is still in line with the target value of the EU commission (ratio of charging stations to EVs)
- A closer look at different sizes of villages and cities shows an even development of the number of charging stations. Rural communities take part in this development.
- Across Germany, there are over 2,000 operators of charging stations. However, several cities have a high market concentration of local operators. High consumer prices could be a consequence.

## Current stocks of electric vehicles and charging columns

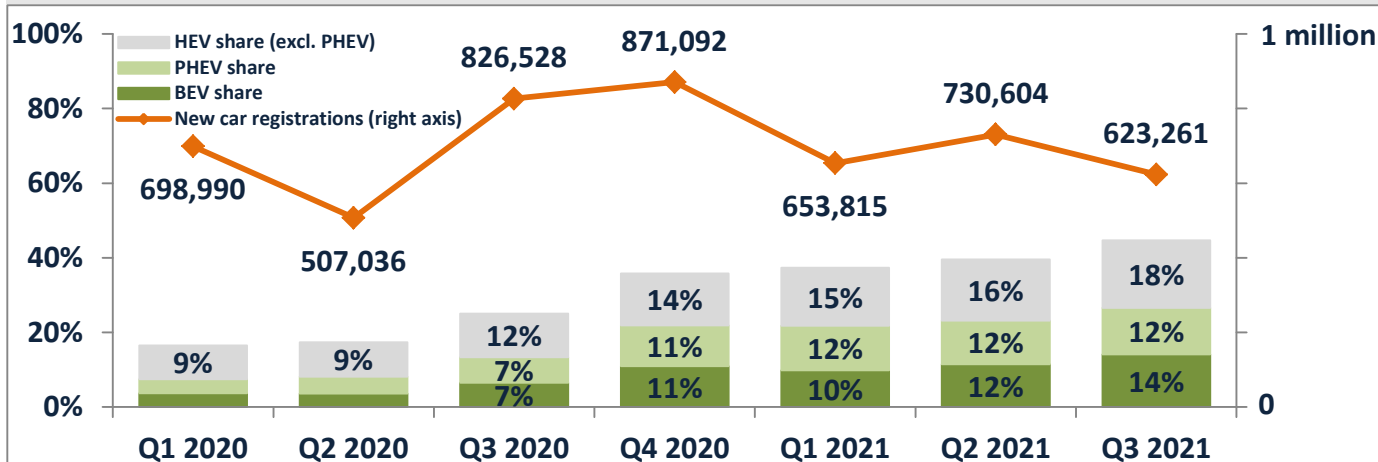


Source: BNA, KBA, Team Consult Analysis

EV: Electric vehicle

- Up until the middle of last year, German Electric Vehicle drivers on average had a high chance of finding a free public charging column, because for every public charging column, only 5 to 6 electric vehicles were registered.
- While the installation of new charging stations has been evolving linearly over the last years, the sales of EVs heavily increased since July 2020. The target value of the EU Commission of 10 charging columns per EV is currently achieved. In light of high EV registrations, an acceleration of the charging columns expansion will be necessary to maintain the target value.

## Latest trends in new car registrations

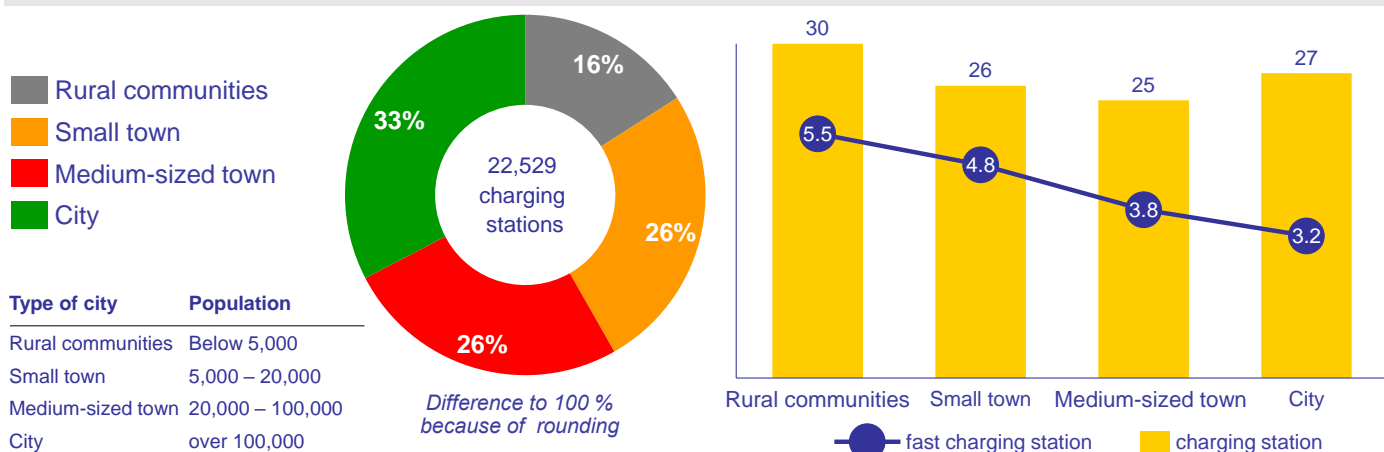


Source: KBA, Team Consult Analysis

BEV: Battery Electric Vehicle, PHEV: Plug-In Hybrid Electric Vehicle, HEV: Hybrid Electric Vehicle

- The introduction of the "innovation bonus" subsidy at the beginning of the third quarter of 2020 and the temporary reduction in value-added tax boosted the number of new registrations of alternative drive systems.
- By now, every fourth newly registered car in Germany is a BEV or a plug-in hybrid vehicle.

## Distribution of charging stations across different city sizes (01/09/21\*)



Source: Fed. Network Agency, BBSR, Fed. Statistical Office, Team Consult Analysis

\*Date attribution of city sizes: 31/12/17

- Most of the charging stations are located in cities, while in rural communities the fewest are available (33 % to 16 %).
- However, a look at public charging stations per capita shows the highest value for rural communities (30 charging stations per 100,000 inhabitants) and the lowest (25) for medium-sized towns. Most fast charging stations are available in rural communities.
- There are no big differences regarding the amount of charging stations between cities and communities of different size. The rural communities are in a good starting position. Nevertheless, the average distance to the nearest charging station can still vary.

## Market concentration of charging columns operators



Source: Federal Network Agency, Team Consult Analysis

*Difference to 100 % due to rounding*

- There are over 2,000 operators of public charging columns across Germany, but many of them are operating only one or two charging columns. While some companies focus on few cities (e.g. SWM Versorgung in two cities), other companies operate charging points in many cities (e.g. EnBW in more than 750 cities). Germany-wide, the five largest operators have a combined market share of 22 %, which can be interpreted as a low market concentration.
- This picture is reversed when looking at regional markets. A high market concentration prevails in several cities like in Munich and Hamburg with a market share of the respective local municipal utility of above 80 %. In order to avoid too high consumer prices in the long term, more competition at the local level will be necessary.

### Imprint

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