

**EUROPE IS
CHARGING
AHEAD FOR**

**THE SECOND
WAVE IN EV
ADOPTION**

2025 is set to be a pivotal year, with a **significant step up in CO2 emission targets** for car makers...

Figure 1: EU CO2 emission standards for light-duty vehicles
(in grams per kilometer)

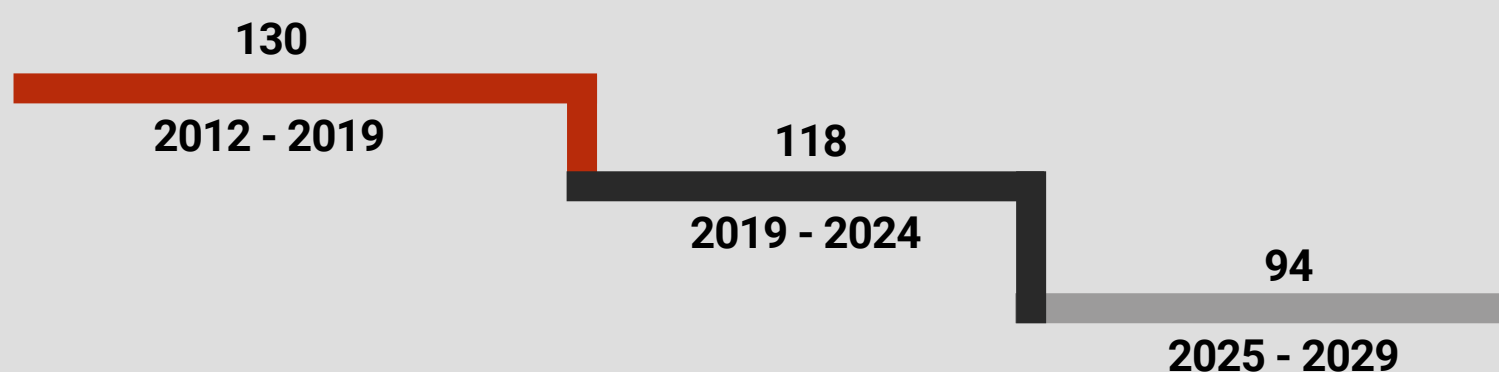
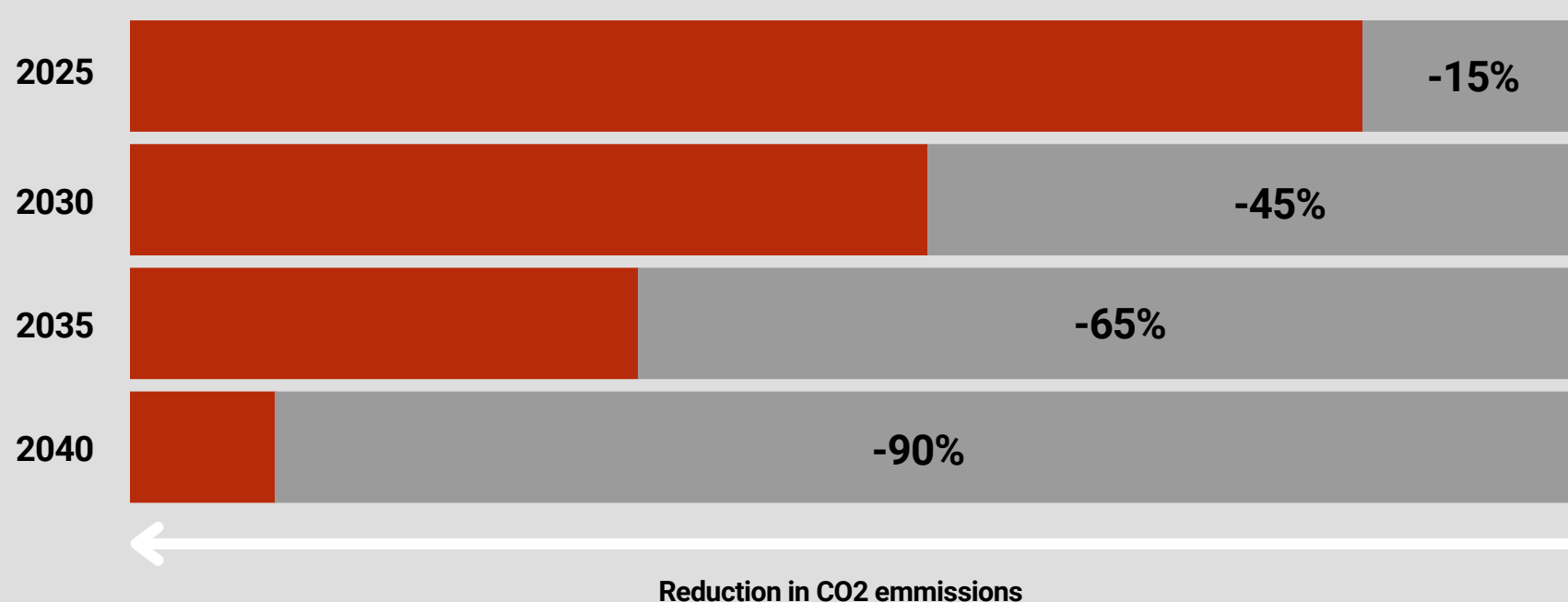
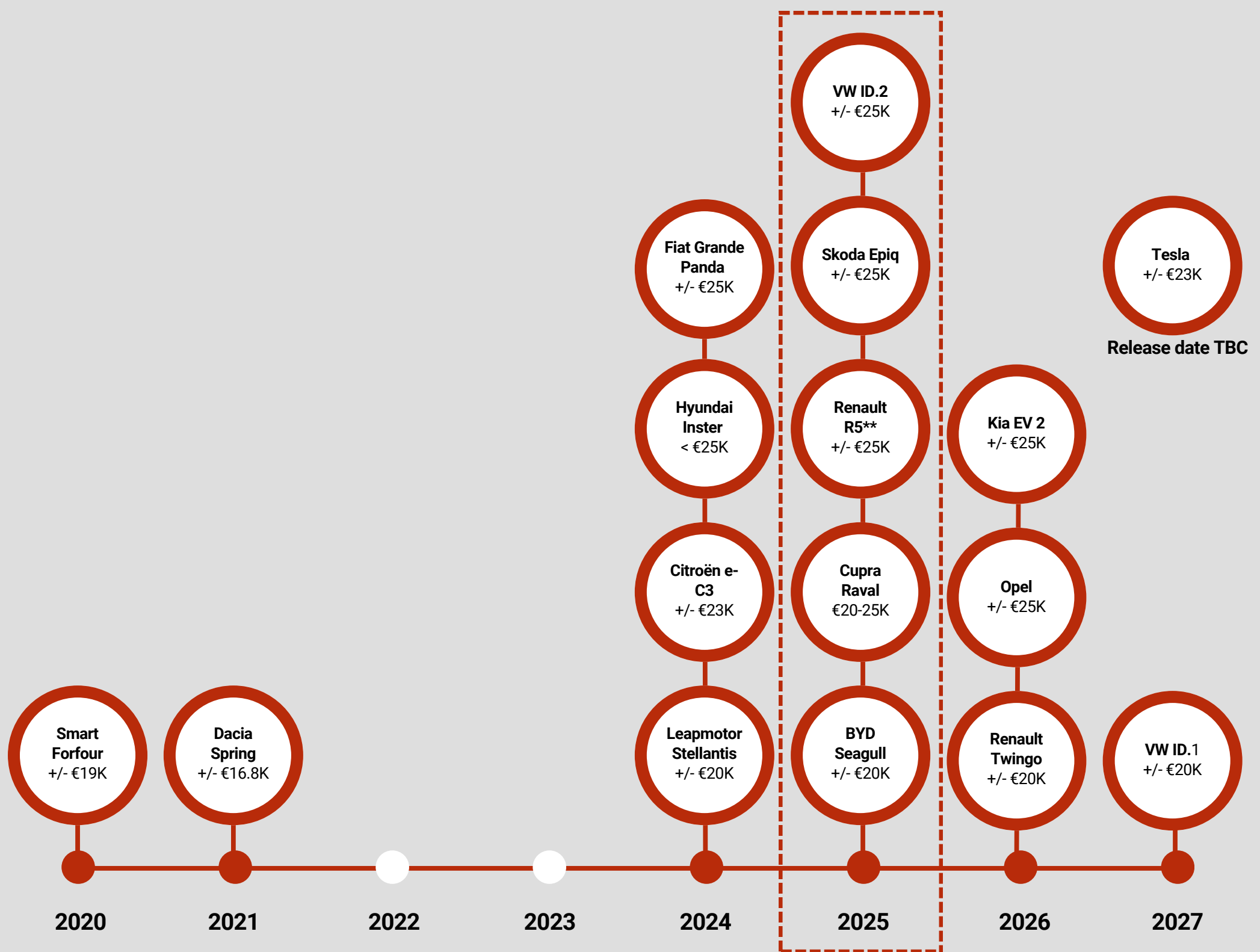


Figure 2: EU CO2 emission standards for heavy-duty vehicles



... leading to **a flurry of cheaper EV models** that will boost demand and overall EV adoption

Figure 3: Affordable sub-25K BEV models in Europe



January has already broken all records, with analysts predicting significant growth for 2025

Figure 4: BEV sales YOY growth
(BEV sales Jan '25 vs. Jan '24)

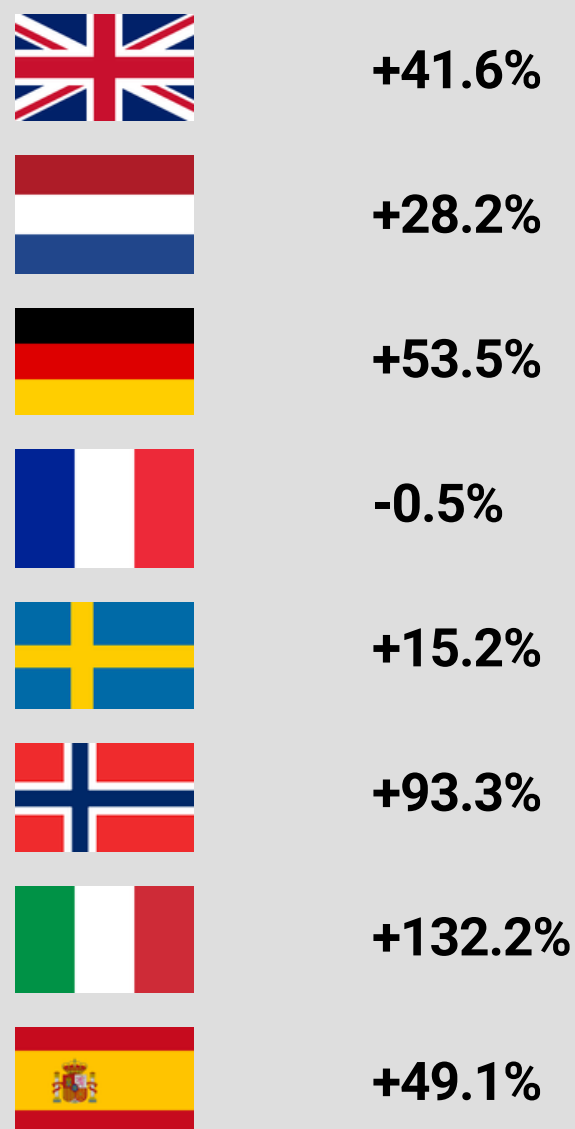
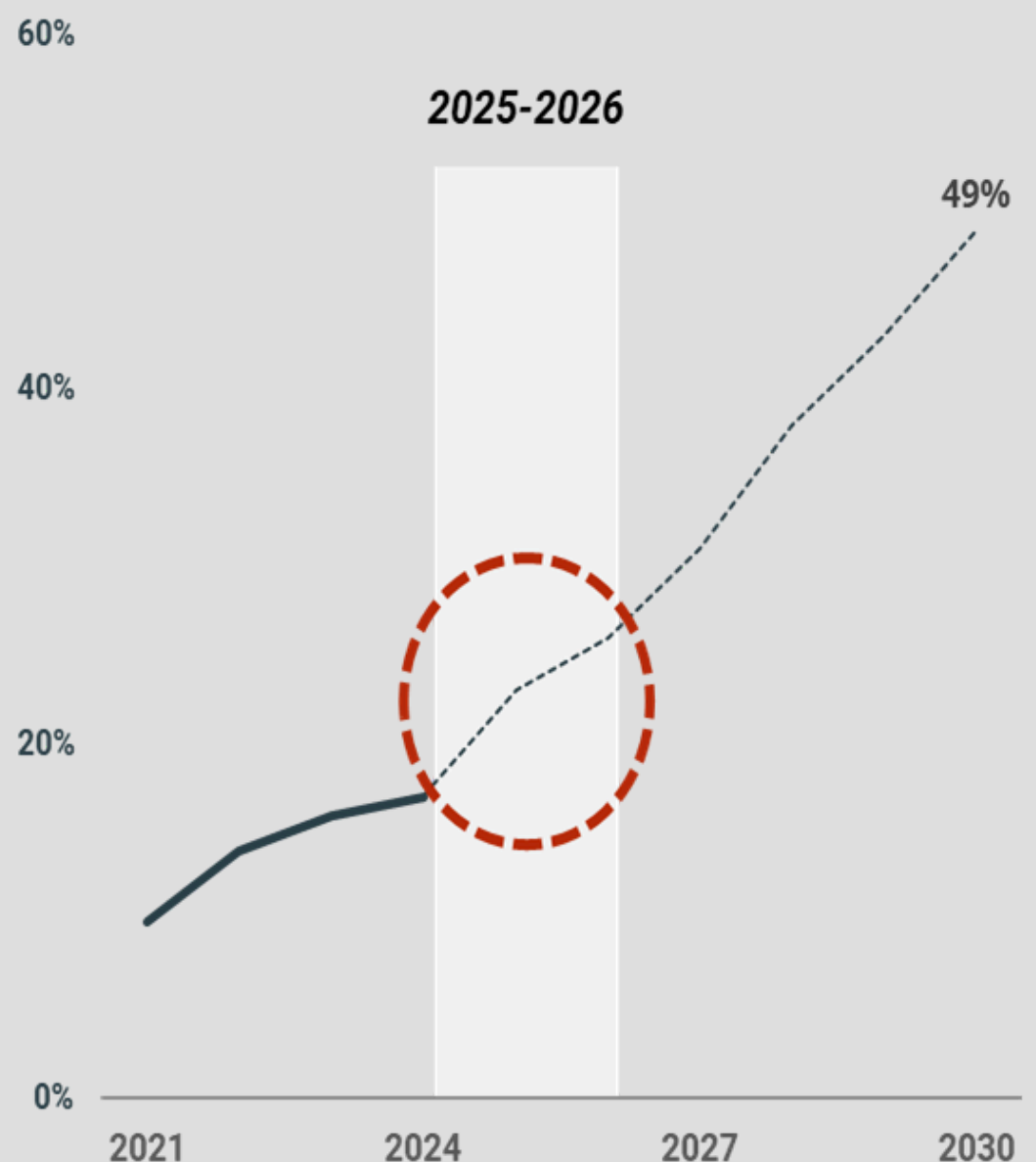


Figure 5: BEV sales outlook
(BEV as % of total passenger car sales in Europe)

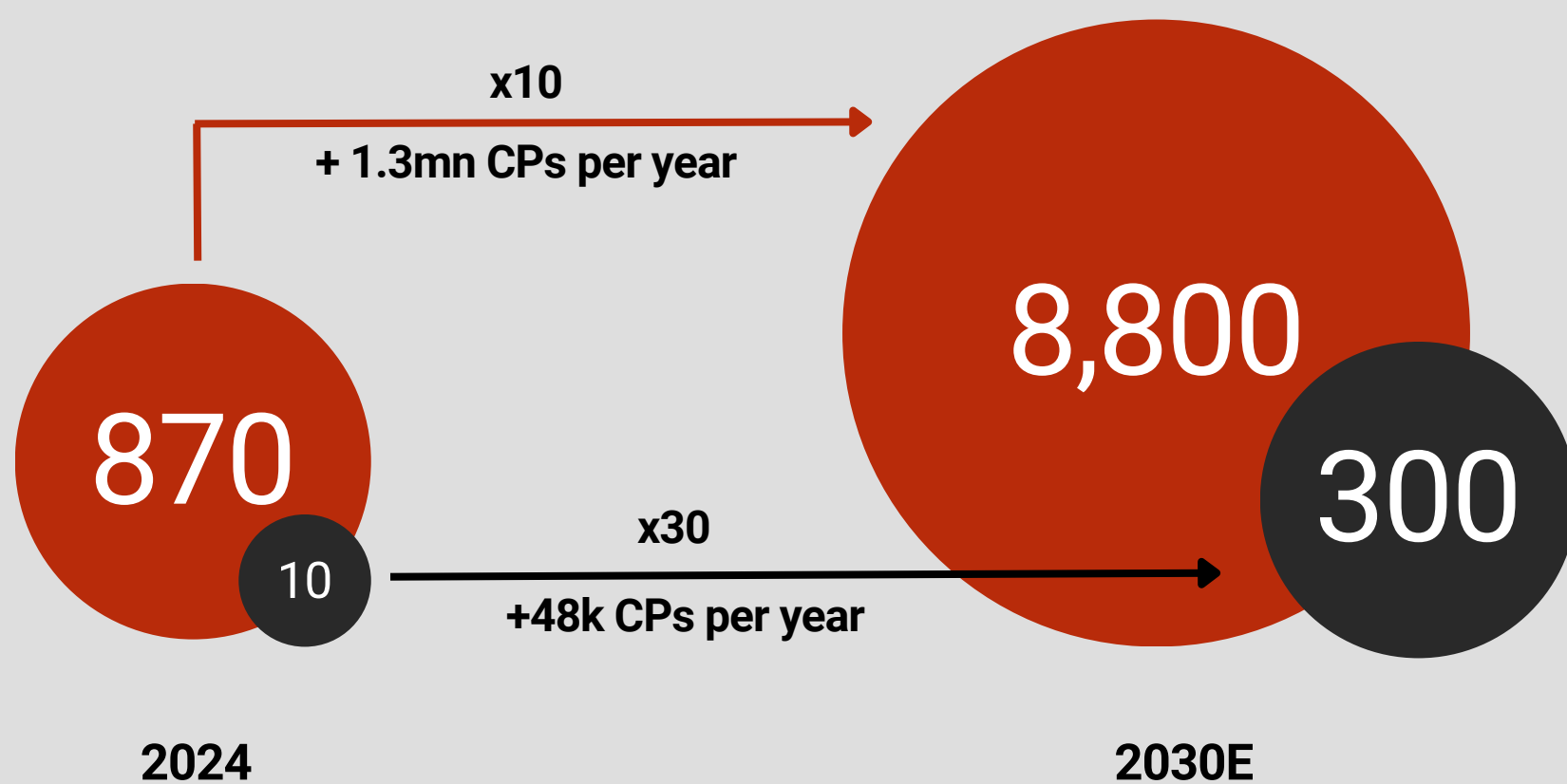


To support this growth in EVs, **millions of new charge points will be needed**

Figure 6: Number of charge points in Europe

(2024 vs. 2030 estimate, in thousands)

- Total public charging network
- HDV public + private charging network



Presenting significant opportunities for continued and new investment in the sector

€20-25bn

cumulative investment required in infrastructure for passenger & heavy-duty electric vehicles in Europe between 2025 – 2030



Jelle Vastert
E-Mobility & Energy Industry
Expert at IMPROVED

Charging infrastructure is the backbone of the electric revolution. Temporary market fluctuations don't change the fact that fleets, cities, and drivers all need a reliable and expansive network.

In Europe, we are seeing strong signs of continued EV adoption and charging infra deployment, driven by increasing regulations and more affordable EVs coming to market - entering a new phase of scale, reliability, and business model evolution.

REACH OUT TO OUR TEAM



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