

## Electric vehicle charging infrastructure spain

After the energy price shock resulted in a subdued start to the year, the EV and EV charging markets sparked back into life in late 2022. Almost all countries featured in the fourth edition of Roland Berger's EV Charging Index hit record-high scores, with several leaping up the rankings. Also covered in the edition: customer behavior is changing and OEM's strategy for EV charging infrastructure is showing regional differences.

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Spain has experienced slow uptake of electric vehicles and related charging infrastructure through 2019, creating an immense challenge for widespread electrification. By the end of 2019, Spain had 46,000 registered electric vehicles representing 0.2% of the 25 million passenger cars in Spain and 8,000 chargers. To reach a stock of 2.7 million to 3.6 million electric vehicles and 50% to 70% of passenger car sales in 2030, 205,000 to 263,000 workplace, public, and fast chargers are needed. This represents an annual growth rate of 33% to 36% in vehicle chargers in Spain.

Charger installation will need to increase 43% to 46% annually until 2025 to support the scenarios in this paper. Because fewer chargers per vehicle are needed as the market grows, the annual increase will decline from 2025 to 2030. Despite a declining public charger per vehicle ratio, a growing market still requires increasing charger installation until 2030.

Different ratios of home and non-home chargers can serve the same number of electric vehicles. Home charging remains primary in almost all scenarios studied and is where most charging is expected to occur. When workplace charging is reserved exclusively for those with no home charging, 24% fewer non-home chargers were needed. When a large shift to daytime charging was tested to simulate large solar generation, total non-home chargers increased by 45% versus the base scenario.

Light commercial vehicles and other medium and heavy-duty applications are expected to need additional infrastructure. Taxi, carsharing, or ride-hailing fleets are also expected to require significant infrastructure, but some of the infrastructure identified in this analysis can be shared with these vehicles.

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