

Charging infrastructure outpaces EV sales in Europe

21-Jul-2026 15:44 GMT

Amit Panday

Mobility Global

Supply Chain and Technology, Automotive

The EU has built approximately 1.1 million public charging points by the end of 2025, representing a fivefold increase from 2020 levels

Europe's electric vehicle charging infrastructure has expanded at a pace that is now outstripping the growth of the EV fleet itself, highlighting how policymakers and industry stakeholders have adopted a proactive approach to support the region's electrification ambitions.



Source: Getty Images/Ziga Plahutar

A report published by the Brussels-based Transport & Environment (T&E), a nonprofit advocacy group known for its role in exposing the Dieselgate emissions scandal, on July 20, shows that the deployment of EV charging infrastructure across the EU is running well ahead of regulatory requirements, providing an important foundation for the next phase of EV adoption.

The findings shared by T&E in its recent report challenge one of the most persistent consumer concerns surrounding the mass adoption of EVs: concerns about insufficient charging infrastructure, which can create bottlenecks for consumers.

On the contrary, the European market is witnessing the opposite phenomenon, with public EV charging infrastructure being built in anticipation of future demand.

According to T&E, the EU had approximately 1.1 million public charging points by the end of 2025, representing a fivefold increase from 2020 levels. More importantly, the growth in charging capacity has exceeded that of the battery-electric vehicle (BEV) fleet.

Under the Alternative Fuels Infrastructure Regulation (AFIR), all member states are required to provide at least 1.3 kW of public charging capacity for every BEV registered in their national fleets. By March 2026, every EU country except Malta had met this fleet-based requirement, T&E's analysis pointed out.

When combined at the regional level, EU countries exceeded the AFIR target by an impressive 180%, demonstrating that deployment of EV charging stations is comfortably ahead of EV adoption.

This outcome is largely due to Europe's regulatory framework. Unlike many other regions that have relied primarily on market forces, the EU has established legally binding infrastructure targets to ensure that charging networks expand in tandem with, or ahead of, EV sales. The AFIR mandates have been successful in creating clear investment signals for charge-point operators (CPOs), utilities, automakers and governments, reducing uncertainty around infrastructure deployment. As a result, the providers of EV charging services have been driving investments ahead of demand for charging stations, the report noted.

Notably, the European Green Deal, stricter vehicle emissions standards, and the region's long-term goal of phasing out new internal combustion engine (ICE) car sales have encouraged governments and private companies to prepare for a significantly larger EV parc. As a result, infrastructure developers, including utility companies, real estate players and others, recognize that the availability of EV charging infrastructure will be critical if Europe is to meet its climate and transportation objectives, making the deployment of EV chargers a strategic priority rather than a reactive measure.

Progress on this front is particularly evident along the major transport corridors. AFIR requires

ultrafast direct current (DC) charging stations of at least 150 kW to be installed every 60 kilometers along the Trans-European Transport Network (TEN-T).

T&E found that by June 2026, 79% of the TEN-T Core network, which includes major national motorways, had already achieved the bloc's 2025 target. Meanwhile, in Western Europe, compliance exceeded 99%, indicating that long-distance EV travel has become increasingly practical across much of the region.

While Western Europe remains the most mature market, T&E's findings suggest that Southern, central and Eastern European countries are rapidly catching up. Countries that previously lagged in charging deployment are now recording some of the fastest growth rates in ultra-fast charging infrastructure.

Poland, for example, has increased its TEN-T Core network coverage from just 20% at the end of 2024 to 59% by June 2026. Similar progress is being recorded in Romania and other emerging EV markets. T&E estimates that deploying or upgrading just 70 strategically located charging stations, including 22 in Spain, 11 in Poland and seven in Romania, could increase the EU's overall compliance with AFIR's distance-based requirements to more than 90%.

The rapid build-out also reflects growing private-sector investment. Energy companies, CPOs, utilities and fuel retailers are increasingly viewing EV charging as a long-term growth opportunity. Traditional fuel stations across Europe are adding fast-charging facilities, while supermarkets, hotels, shopping centers and commercial property owners are integrating charging services into their offerings. These investments are creating a broader and more diverse charging ecosystem that extends beyond public charging hubs.

Despite the positive momentum, challenges remain. The T&E report noted that charging availability is no longer the primary concern in many markets. Instead, issues such as pricing transparency, interoperability, ease of use and payment convenience are becoming increasingly important.

Looking ahead, the focus is likely to shift toward smart charging, workplace charging and bidirectional charging technologies. Since most EV charging is expected to occur at homes and workplaces, the expansion of private and semipublic charging solutions will complement the growing public network. The EU has already met its 2027 targets for much of the TEN-T Comprehensive network and has made significant progress toward its 2030 goals, underscoring that infrastructure development is increasingly planned for future demand rather than current needs.

CONTACTS

The Americas

+1 877 863 1306

Europe, Middle East & Africa

+44 20 7176 1234

Asia-Pacific

+852 2533 3565

www.mobilityglobal.com

Copyright © 2026 Mobility Global. All rights reserved.

These materials, including any software, data, processing technology, information, research, forecasts, model, software or other application or output described herein, or any part thereof (collectively the “Property”) constitute the proprietary and confidential information of Mobility Global Inc. and its affiliates (each and together “Mobility Global”) and/or its third-party provider licensors. Mobility Global on behalf of itself and its third-party licensors reserves all rights in and to the Property. These materials have been prepared solely for information purposes based upon information generally available to the public and from sources believed to be reliable.

Any copying, reproduction, reverse-engineering, modification, distribution, transmission or disclosure of the Property, in any form or by any means, is strictly prohibited without the prior written consent of Mobility Global. The Property shall not be used for any unauthorized or unlawful purposes. Mobility Global's opinions, statements, estimates, projections, quotes and other analyses are statements of opinion as of the date they are expressed and not statements of fact or recommendations to purchase, hold, or sell any securities or to make any investment decisions, and do not address the suitability of any security, and there is no obligation on Mobility Global to update the foregoing or any other element of the Property. The Property and its composition and content are subject to change without notice.

THE PROPERTY IS PROVIDED ON AN “AS IS” BASIS. NEITHER MOBILITY GLOBAL NOR ANY THIRD PARTY PROVIDERS (TOGETHER, “MOBILITY GLOBAL PARTIES”) MAKE ANY WARRANTY, EXPRESS OR IMPLIED, INCLUDING BUT NOT LIMITED TO ANY WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE, FREEDOM FROM BUGS, SOFTWARE ERRORS OR DEFECTS, THAT THE PROPERTY'S FUNCTIONING WILL BE UNINTERRUPTED OR THAT THE PROPERTY WILL OPERATE IN ANY SOFTWARE OR HARDWARE CONFIGURATION, NOR ANY WARRANTIES, EXPRESS OR IMPLIED, AS TO ITS ACCURACY, AVAILABILITY, COMPLETENESS OR TIMELINESS, OR TO THE RESULTS TO BE OBTAINED FROM THE USE OF THE PROPERTY. MOBILITY GLOBAL PARTIES SHALL NOT IN ANY WAY BE LIABLE TO ANY RECIPIENT FOR ANY INACCURACIES, ERRORS OR OMISSIONS REGARDLESS OF THE CAUSE. Without limiting the foregoing, Mobility Global Parties shall have no liability whatsoever to any recipient, whether in contract, in tort (including negligence), under warranty, under statute or otherwise, in respect of any loss or damage suffered by any recipient as a result of or in connection with the Property, or any course of action determined, by it or any third party, whether or not based on or relating to the Property. In no event shall Mobility Global be liable to any party for any direct, indirect, incidental, exemplary, compensatory, punitive, special or consequential damages, costs, expenses, legal fees or losses (including without limitation lost income or lost profits and opportunity costs or losses caused by negligence) in connection with any use of the Property even if advised of the possibility of such damages. The Property should not be relied on and is not a substitute for the skill, judgment and experience of the user, its management, employees, advisors and/or clients when making investment and other business decisions.

The Mobility Global logo is a registered trademark of Mobility Global, and the trademarks of Mobility Global used within this document or materials are protected by international laws. Any other names may be trademarks of their respective owners.

The inclusion of a link to an external website by Mobility Global should not be understood to be an endorsement of that website or the website's owners (or their products/services). Mobility Global is not responsible for either the content or output of external websites.