EV Charging As A Service Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** Electric Vehicles & Clean Mobility (Automotive & Transportation)

> **Source:** https://www.mordorintelligence.com/industry-reports/ev-charging-as-a-service-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 236.12 million
Projected Forecast (2031)	USD 236.12 million
Growth Rate (CAGR)	27.47 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market OverviewStudy Period | 2019 - 2031 |
Market Size (2026) | USD 236.12 Million |
Market Size (2031) | USD 794.66 Million |
Growth Rate (2026 - 2031) | 27.47 % |
Fastest Growing Market | Asia-Pacific |
Largest Market | North America |
Market Concentration | Medium |
Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

EV Charging As A Service Market Analysis by Mordor IntelligenceThe EV Charging as a Service Market was valued at USD 185.24 million in 2025, and is projected to grow from USD 236.12 million in 2026 to USD 794.66 million by 2031, registering a CAGR of 27.47% during the forecast period (2026–2031). Fleet operators, landlords, and municipalities are increasingly turning to service providers to mitigate charger ownership risks. These providers offer a bundled package of hardware, software, and maintenance for a monthly fee. In the U.S., agencies are disbursing National Electric Vehicle Infrastructure (NEVI) grants to vendors, with a stipulation that they guarantee high uptime—a benchmark that's nearly unattainable for budget-strapped cities. Meanwhile, Europe is advancing the Alternative Fuels Infrastructure Regulation (AFIR), mandating a significant increase in public chargers relative to the number of battery-electric vehicles by the end of the decade. This regulation is nudging highway concessionaires towards long-term Charging-as-a-Service (CaaS) agreements, often featuring revenue-sharing clauses. In the Asia-Pacific region, momentum is largely driven by China's strategic move, allowing private operators to oversee a substantial number of existing chargers. In exchange, these operators receive fees based on utilization and additional income from grid services.

Key Report Takeaways* By charger type, AC units led with 71.27% of the EV Charging As A Service market share in 2025, while DC fast chargers are projected to advance at a 27.49% CAGR through 2031.
* By fleet service, company vehicles and motor pools captured 27.65% of the EV Charging As A Service market share in 2025, whereas delivery fleets are forecast to expand at a 27.55% CAGR to 2031.
* By end-use, semi-public workplace and retail sites accounted for 71.38% of the EV Charging As A Service market share in 2025, and mobile on-demand charging is poised to rise at a 27.53% CAGR over 2026-2031.
* By power output, Level 1 and AC chargers below 22 kW controlled 78.34% of the EV Charging As A Service market share in 2025, yet ultra-fast systems above 150 kW are expected to grow at a 27.58% CAGR through 2031.
* By geography, North America dominated, accounting for 46.21% of the EV Charging As A Service market share in 2025, while Asia-Pacific is the fastest-growing region, forecast to grow at a 27.61% CAGR to 2031.

Key Market Trends

Market Trends and InsightsDrivers Impact Analysis of EV Charging As A Service Market*Drivers | (~) % Impact on CAGR Forecast | Geographic Relevance | Impact Timeline |
Government Subsidies and Mandates For Public Charging Roll-Outs | +6.2% | North America & EU core, spill-over to APAC | Medium term (2-4 years) |
Corporate Fleet-Electrification Commitments | +5.8% | Global, concentrated in North America & Europe | Long term (≥ 4 years) |
Rapid Build-Out of DC Fast-Charging Corridors | +5.4% | North America, Europe, China | Short term (≤ 2 years) |
Subscription-Based CaaS Financing Models | +3.7% | Global, early traction in Europe | Medium term (2-4 years) |
Mobile On-Demand Charging Services Gain Traction | +3.1% | Urban North America & Europe, pilot expansions in Asia-Pacific | Medium term (2-4 years) |
Micro-Grid + Storage Pairing Cuts Operating Costs | +2.9% | North America & Europe, emerging in China | Long term (≥ 4 years) |
Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The EV Charging-as-a-Service market is dominated by the top five players—ChargePoint, Tesla, Electrify America, EVgo, and BP Pulse—which control a significant share of installed capacity. Tesla's Supercharger network dominates the U.S. DC fast-charging market after the NACS opening. This dominance provides Tesla with unparalleled utilization data and energy purchasing power. ChargeLeague has consolidated a substantial number of European chargers under a single subscription, highlighting a trend towards roaming interoperability over direct ownership. IONNA, backed by multiple automakers, plans to install high-capacity dispensers at numerous Circle K locations in the coming years, showcasing OEMs' commitment to infrastructure that ensures brand-neutral reliability.

Vertical integration reigns supreme. ABB and Delta Electronics merge in-house power solutions with cloud tech, achieving significant improvements in predictive maintenance availability. BP Pulse accelerates its rollout by acquiring Tesla hardware, integrating it with its energy-trading desk to navigate tariff fluctuations. Innovators like SparkCharge and FreeWire tap into mobile and battery-buffered solutions, sidestepping interconnection delays—a boon for hosts averse to prolonged waits for grid upgrades. Software advancements now focus on dynamic load management, telematics, and demand-response market participation, unlocking revenues beyond mere kWh sales.

Mergers and partnerships are on the rise. Recently, Volkswagen integrated LOGPAY and Elli into Elli Mobility, streamlining European charging and payment services. This move echoes BP's strategy of merging retail properties with energy trading benefits. Hardware manufacturers are eyeing software IP to secure long-term customer contracts, while utilities aim to be comprehensive energy and service hubs, maximizing downstream profits. Competitive dynamics are shifting: contracts stipulating penalties for uptime below a certain threshold are now standard in public tenders.

EV Charging As A Service Industry Leaders* ChargePoint Holdings Inc.

* Shell Recharge Solutions

* Tesla Inc.

* ABB Ltd.

* BP Pulse (Chargemaster Limited)

* *Disclaimer: Major Players sorted in no particular order

Component Component 3 Scope Of The Report Bottom

Global EV Charging As A Service Market Report ScopeThe scope of the report includes Charger Type (AC Chargers and More), Fleet Service Type (Company Vehicles & Motor Pools and More), End-Use (Semi-Public Set-Ups and More), Power Output (Level 1/AC (Below 22 kW) and More), and Geography.

Segmentation OverviewBy Charger TypeAC Chargers |
DC Fast Chargers |
Wireless / Inductive Chargers |

Segmentation Accordion Item

By GeographyNorth America | United States |
 | Canada |
 | Rest of North America |

South America | Brazil |
 | Argentina |
 | Rest of South America |
Europe | United Kingdom |
 | Germany |
 | Spain |
 | Italy |
 | France |
 | Russia |
 | Rest of Europe |
Asia-Pacific | India |
 | China |
 | Japan |
 | Indonesia |
 | Malaysia |
 | Singapore |
 | Vietnam |
 | Philippines |
 | South Korea |
 | Rest of Asia-Pacific |
Middle East and Africa | United Arab Emirates |
 | Saudi Arabia |
 | Turkey |
 | Egypt |
 | South Africa |
 | Rest of Middle East and Africa |

Frequently Asked Questions

How fast is the EV Charging As A Service market expected to grow through 2031?

The Market was valued at USD 185.24 million in 2025, and is projected to grow from USD 236.12 million in 2026 to USD 794.66 million by 2031, registering a CAGR of 27.47% during the forecast period (2026–2031).

Which region will add the most new service revenue by 2031?

Asia-Pacific is forecast to be the fastest-growing region, expanding at a CAGR of 27.61% as China and India transition to private managed service models.

What charger type currently leads deployments?

AC Level 2 units held 71.27% of 2025 revenue because hosts can install them on existing 208-volt panels at minimal cost.

Which fleet segment drives the highest growth?

Delivery and logistics fleets are expected to advance at a 27.55% CAGR because e-commerce giants require depot bundles that include load management and renewable-energy certificates.

What is the main financial barrier for ultra-fast charging stations?

Total installed cost for a single 350 kW dispenser can reach USD 300,000 when grid upgrades are necessary, pushing many hosts to adopt subscription-based CaaS instead of ownership.

How fragmented is the competitive landscape?

The top five providers control about 37% of installed capacity, indicating moderate concentration and significant space for regional or niche entrants.