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CHARGING INFRASTRUCTURE INSIGHTS
UK & EUROPE

JUNE 2026

HIGHLIGHTS OF THE MONTH

UK Market Scale and Driver Behaviours

In June 2026, the UK saw a significant surge in Electric Vehicle (EV) adoption, reaching 2.23 million vehicles. With more EVs on the road, the data shows that UK drivers are spending slightly less time at the charger but drawing more power; the average charge time decreased to 26 minutes from May's 27 minutes, while the average consumption rose to 28 kWh per charge, up from 27 kWh the previous month.

Interestingly, despite accounting for only around 14% and 11% of the total network, rapid and ultra-rapid connectors deliver 56% of the total energy volume consumed by drivers.

The European Perspective

Looking at the broader European market, charging infrastructure continues its steady expansion, reaching 1.36 million charge points in June, up from 1.34 million in May. While total European EV numbers held steady at 15.2 million, the average charge time across the continent slightly increased to 29 minutes.

Europe remains heavily dominated by fast charging (8-50 kW) speeds, which make up about 67% of its total connectors. In comparison, the UK leans heavily into slow charging, which now accounts for around 47% of its network, a slight increase from 46% in May. Despite these differing approaches to AC infrastructure, ultra-rapid charging remains the fastest-growing segment across both the UK and Europe.

UK HEADLINE STATISTICS

26 MINUTES
Average charge time*

39k
Locations

118k
Connectors

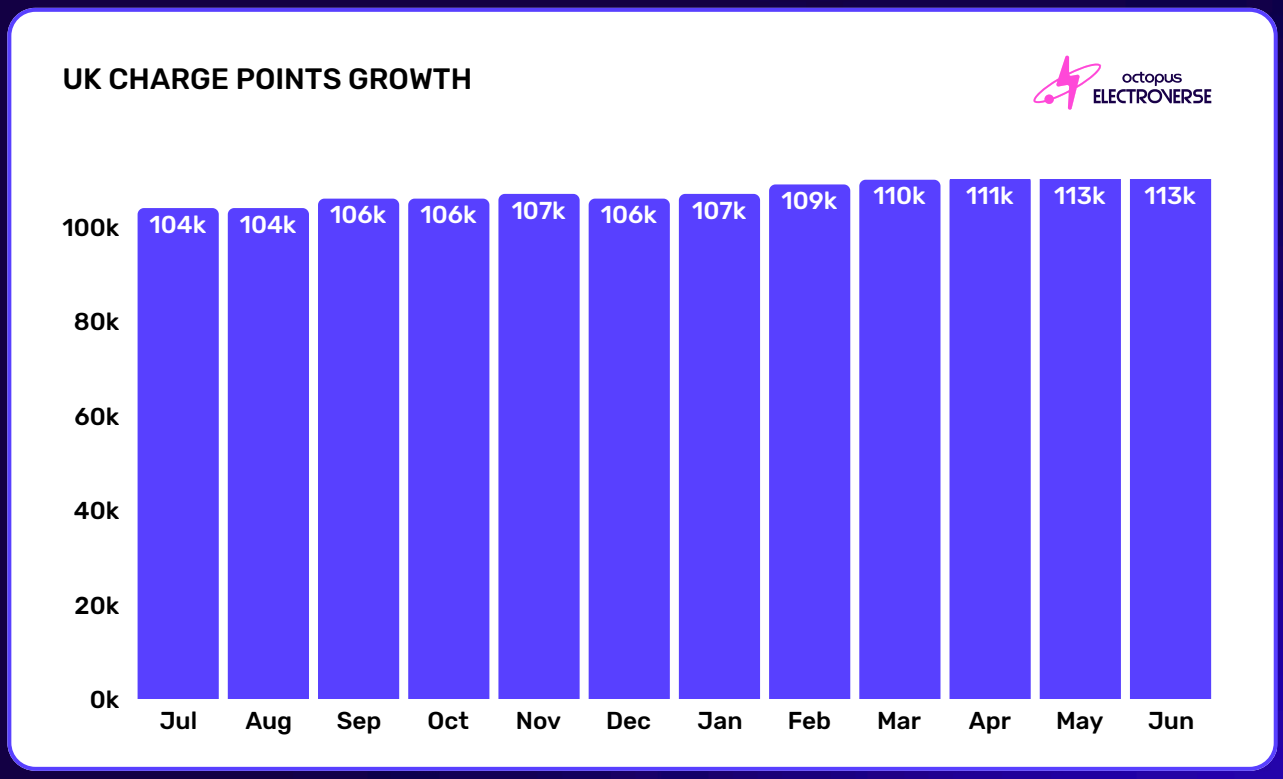
2.23 MILLION
Electric Vehicles

28 kWh
Average consumption per charge*

113k
Charge Points

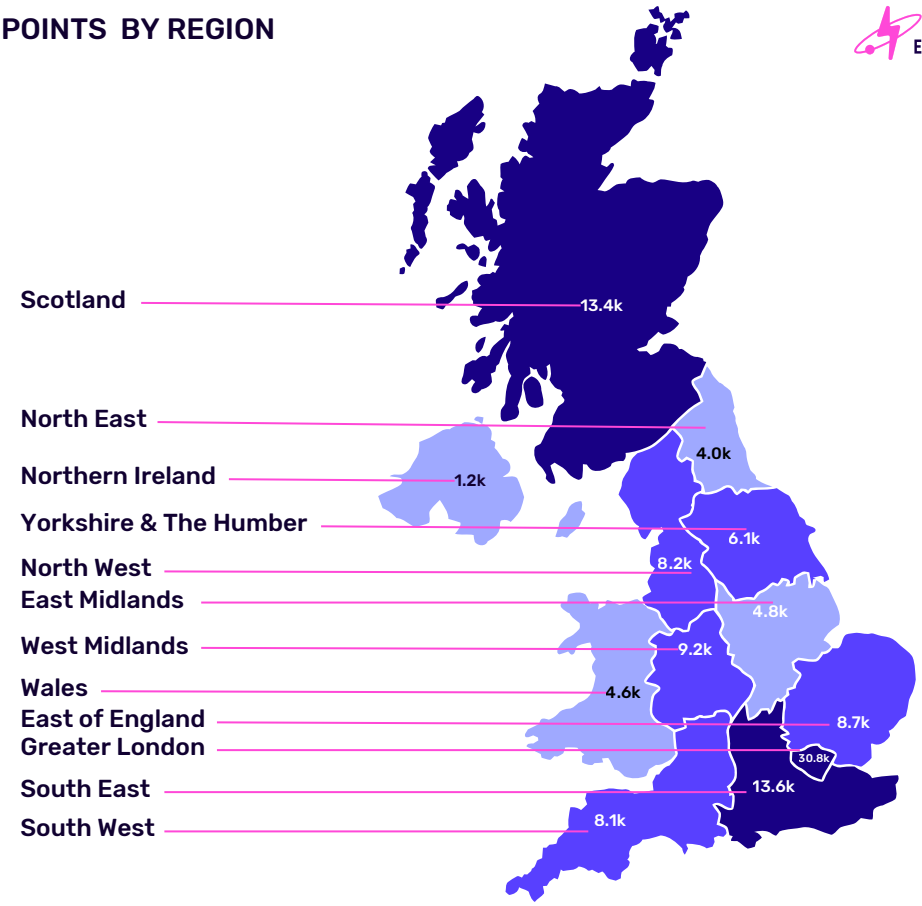
*Based on last month of Electroverse consumers charging data on Ultra Rapid Chargers

In June 2026, the UK's number of charge points totals around 113k. Per region, Greater London, the South East and Scotland account for ~51% of all UK charge points, but when looking at charge points per 100k inhabitants, the West Midlands, North East, and Wales join Scotland and Greater London in the top 5 locations.

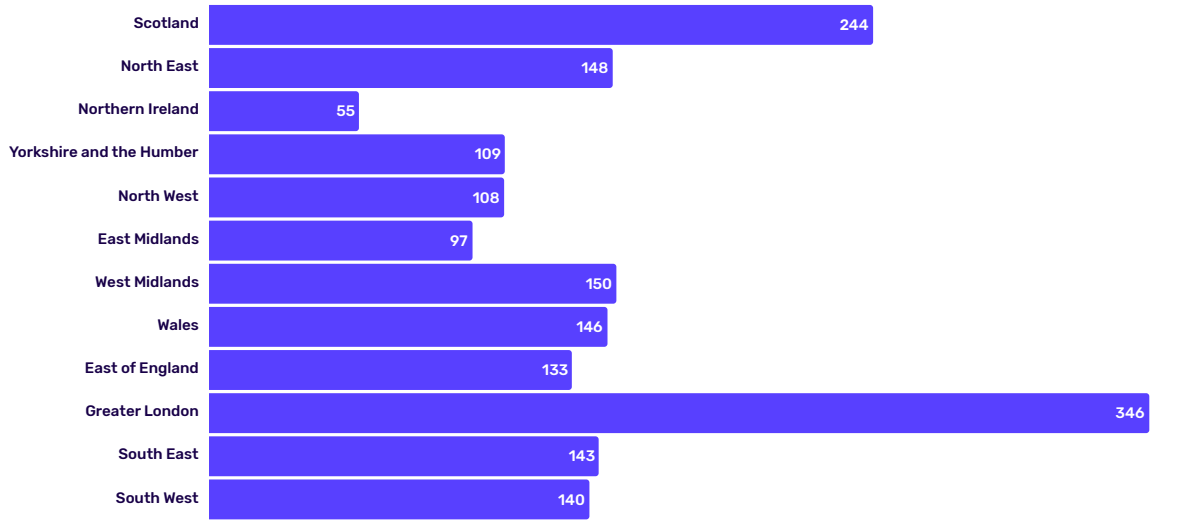


CHARGING INFRASTRUCTURE ACROSS THE UK

CHARGE POINTS BY REGION



CHARGE POINTS PER 100K INHABITANTS

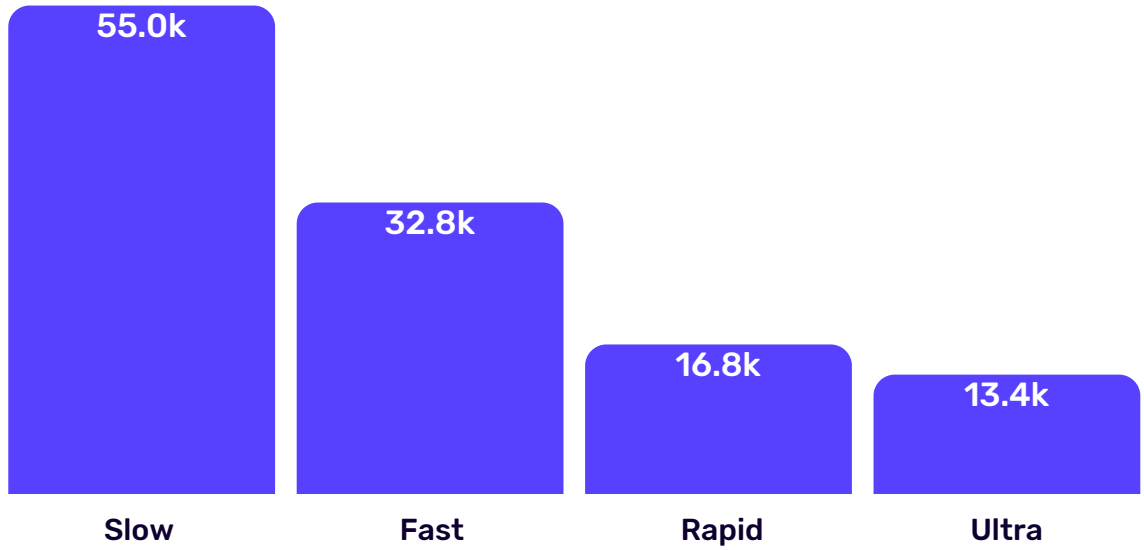


CHARGER CHARACTERISTICS

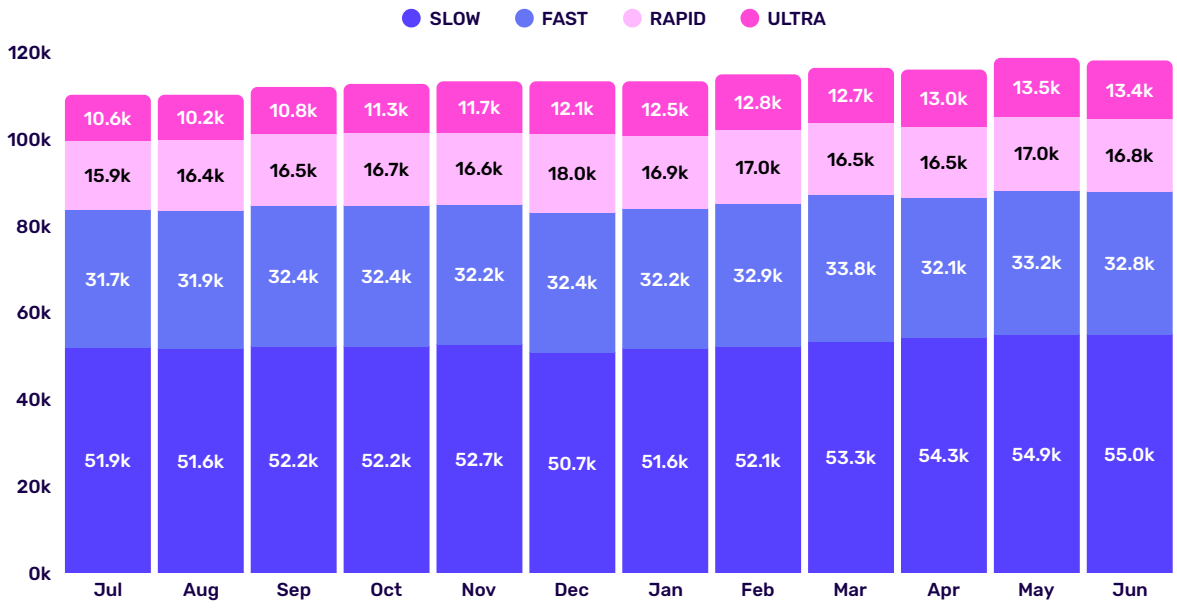
SPEED

Charging connectors offer varying speeds (kW), and are classified as **slow** (< 8 kW), **fast** (8 - 49 kW), **rapid** (50 - 149 kW), or **ultra-rapid** (>= 150 kW). In the UK, slow charging speeds make up around **47%** of the total connectors, with rapid and ultra-rapid contributing around **27%**. Charging speed utilisation often relates to varying driver needs: some slower chargers can act as home charging alternatives, so a greater number is required to meet demand.

UK CONNECTORS BY SPEED



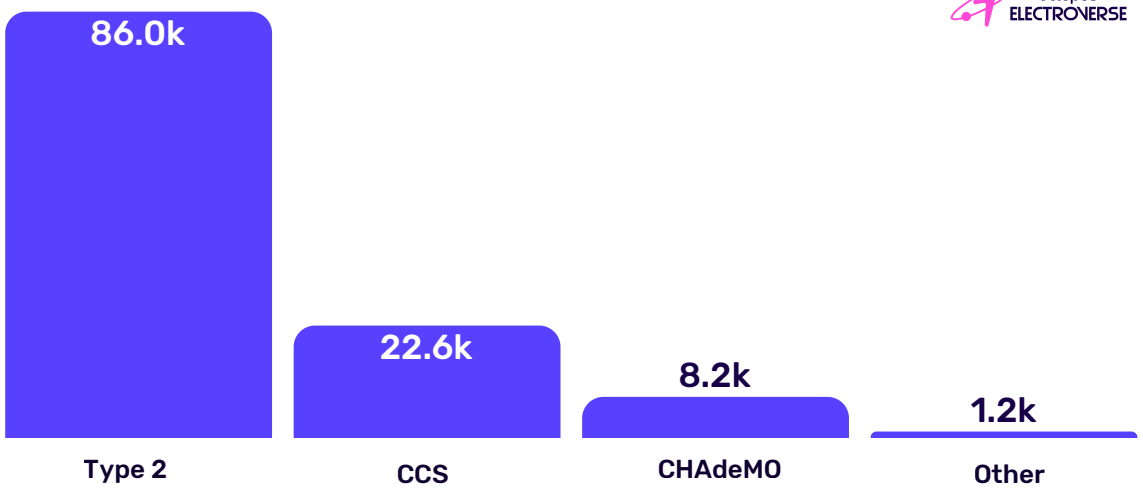
UK CONNECTOR GROWTH BY SPEED



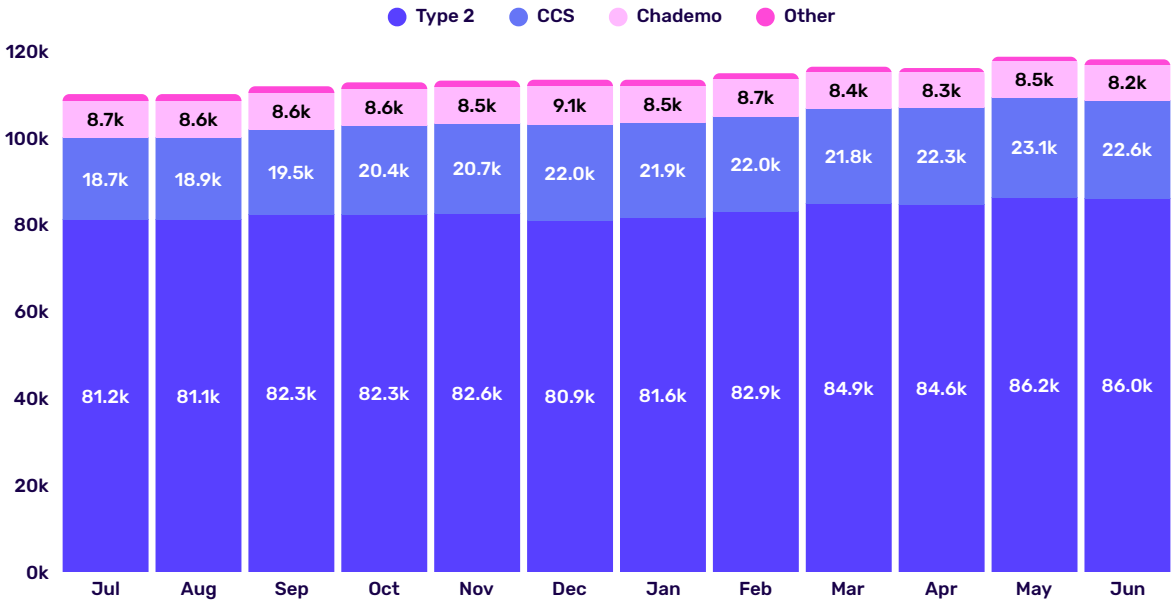
STANDARD TYPE

Type 2 and CCS connectors are being rapidly expanded across the UK, highlighting strong growth in both Slow and Fast charging for Type 2, and Rapid and Ultra-Rapid charging for CCS. Meanwhile, the number of CHAdeMO connectors is declining as CCS gradually replaces this older standard in new vehicles across the UK market.

UK CONNECTORS BY TYPE

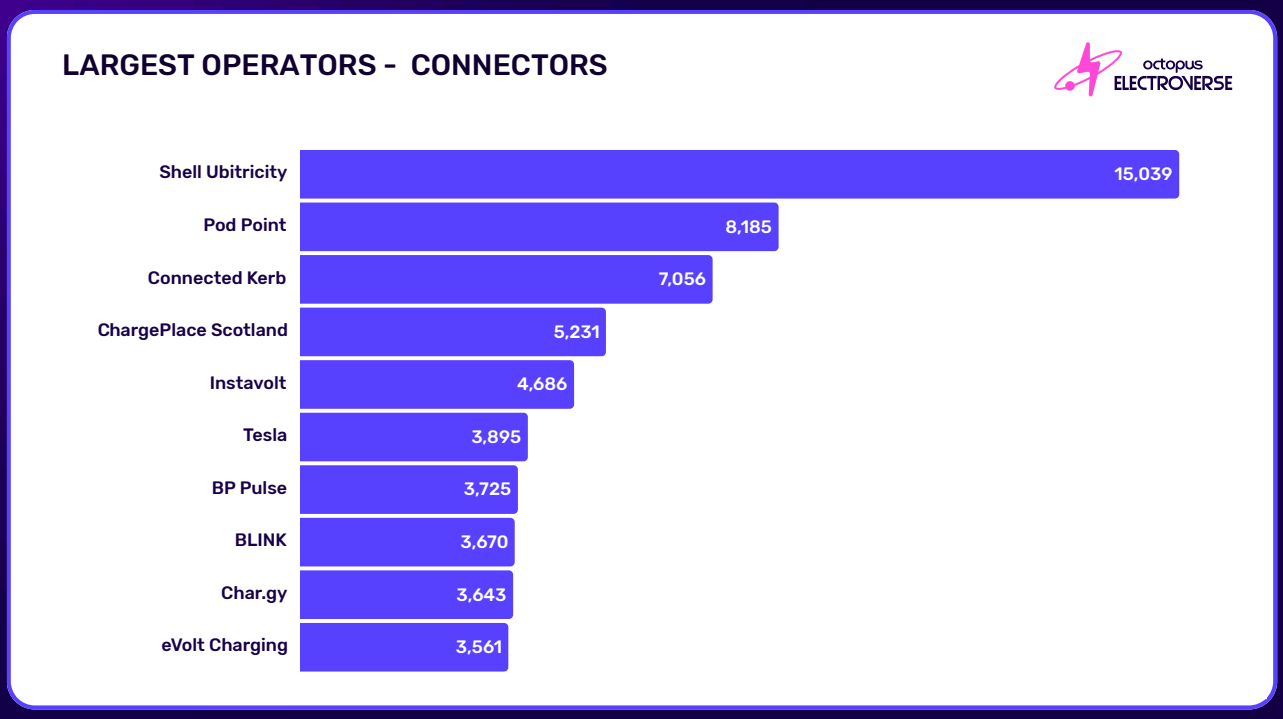


UK CONNECTOR TYPE GROWTH

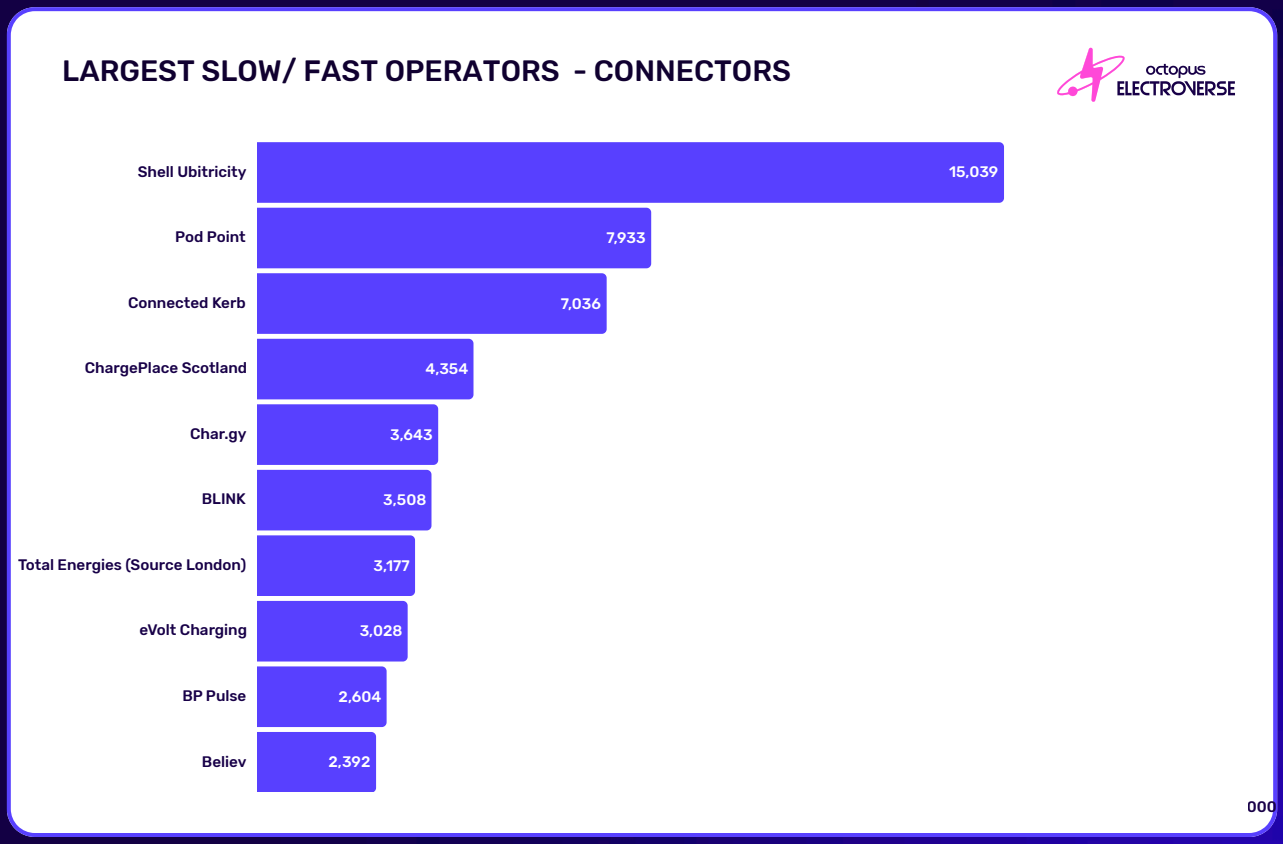


CHARGE POINT OPERATORS

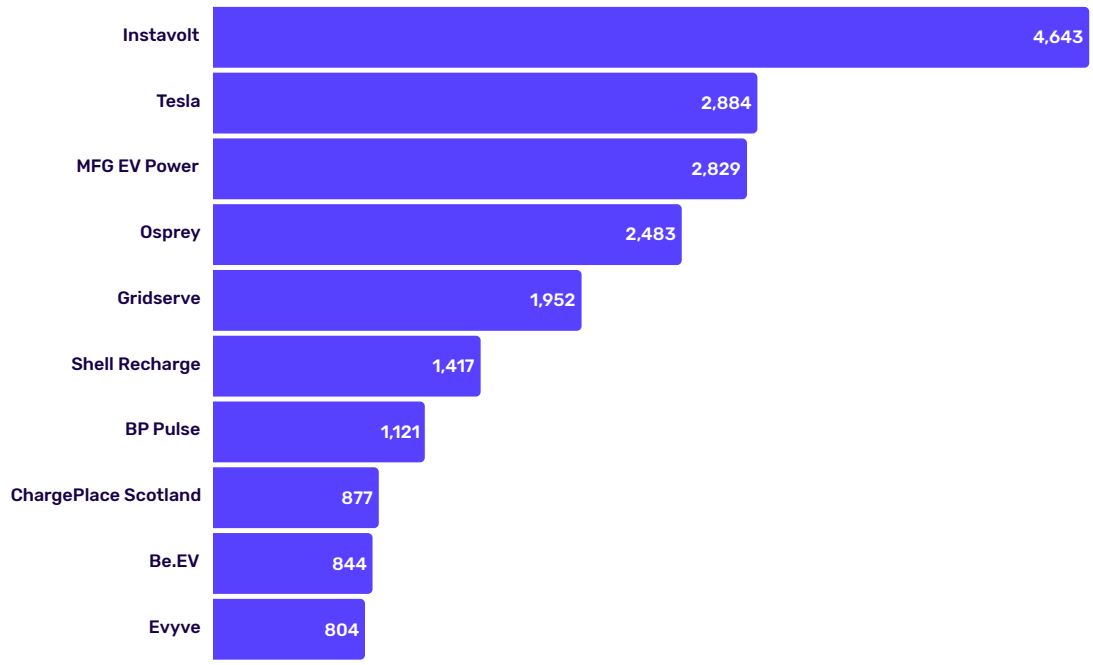
This graph details the largest operators by number of connectors across the UK. Operators, colloquially known as charging networks or ‘CPOs’, run and maintain the charge points on their network.



Operators specialising in slower AC charging, like Shell Ubitricity and Pod Point have established a lead in the total number of connectors across the UK. In contrast, InstaVolt & MFG EV Power dominate the rapid DC charging landscape, closely followed by Osprey & Tesla. While many CPOs focus on either AC or DC infrastructure, some, such as ChargePlace Scotland, offer both.



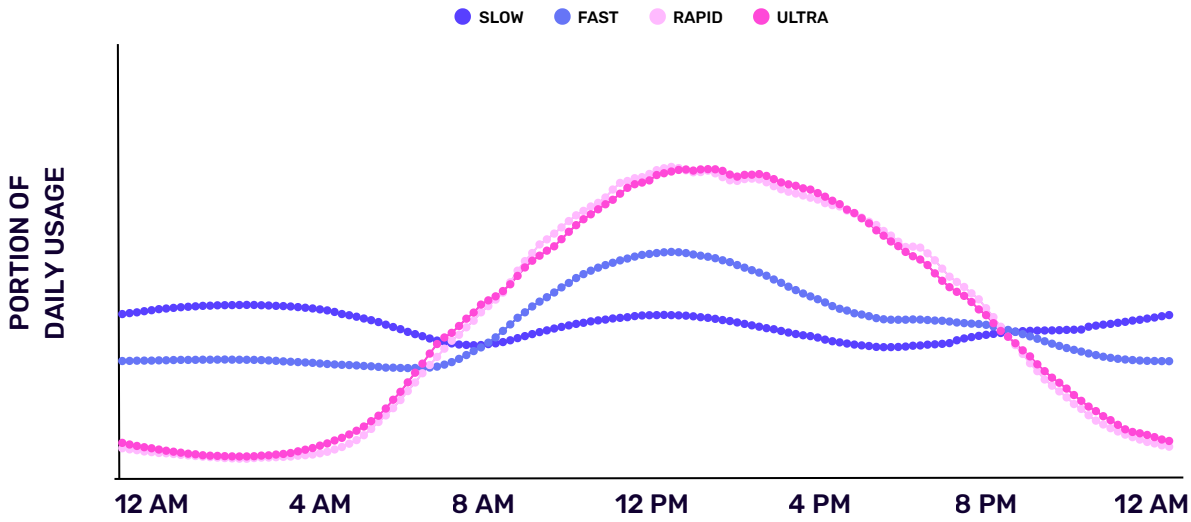
LARGEST RAPID/ ULTRA OPERATORS - CONNECTORS



USAGE PROFILES

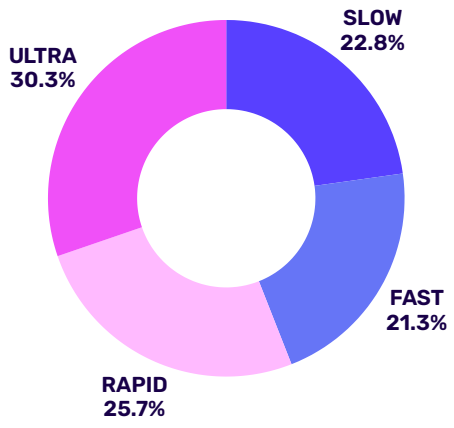
Daily usage curves illustrate how EV drivers interact with EV charging infrastructure. Rapid and Ultra usage peaks during the daytime when drivers are charging on the go. In contrast, slow charger utilisation remains relatively steady, with an uptick overnight as drivers use cheaper, slower speeds as an alternative to home charging.

CUSTOMER CHARGING PROFILES BY TIME OF DAY



Based on Octopus Electroverse consumption data from the last 12 months

CONSUMPTION BY SPEED



AVERAGE TIME CHARGING BY SPEED

SPEED	TIME
SLOW	05 hr 44 minutes
FAST	03 hr 19 minutes
RAPID	00 hr 36 minutes
ULTRA	00 hr 30 minutes

Based on Octopus Electroverse consumption data from the last month

When we look at the distribution of Consumption by Speed, **56%** of the total kWh volume consumed by Electroverse drivers is via ultra-rapid & rapid chargers, despite these only accounting for around **11%** and **14%** of total connectors, respectively. This is partly because these connectors can deliver more energy more quickly.

EUROPEAN HEADLINE STATISTICS

29 MINUTES
Average charge time*

391k
Locations

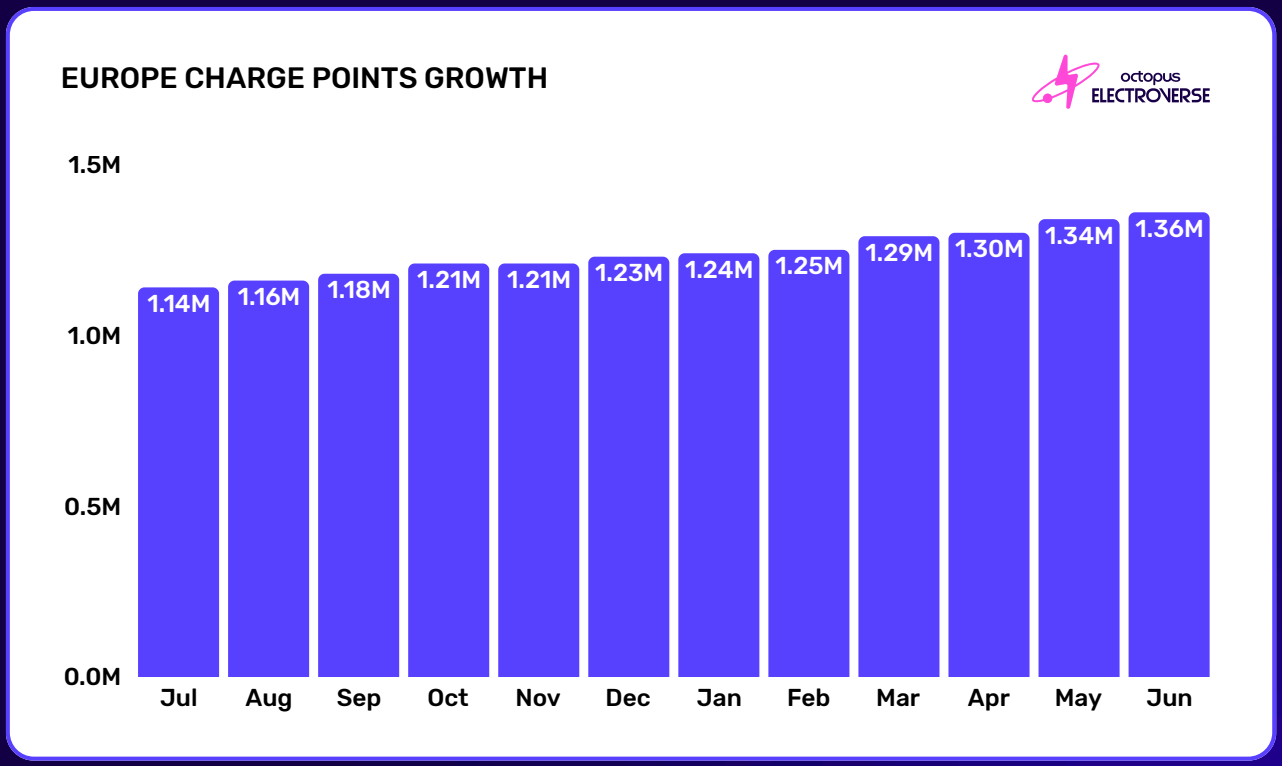
1.41 M
Connectors

15.2 MILLION
Electric Vehicles

28 kWh
Average consumption per charge*

1.36 M
Charge Points

*Based on last month of Electroverse consumers charging data on Ultra-Rapid Chargers



This graph highlights the steady growth of charge points across Europe.

The graphs on the following pages show the mechanisms for achieving this growth vary widely across European markets, both in terms of charging speeds and speed of rollout.

CHARGING INFRASTRUCTURE ACROSS EUROPE

CHARGE POINTS BY COUNTRY

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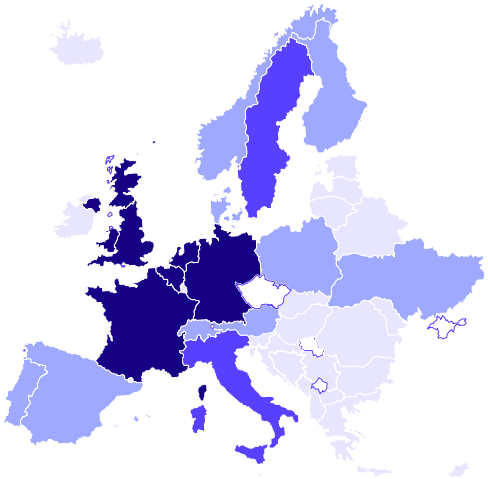
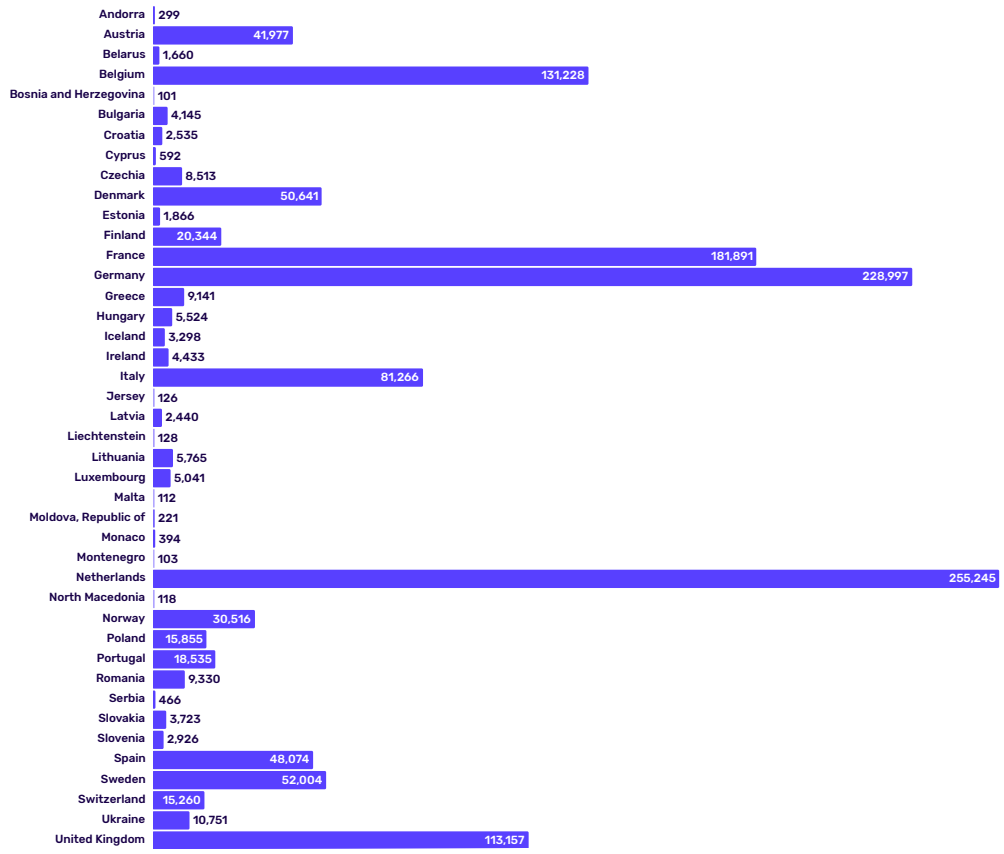
- < 10,000
- 10,000 - 49,000
- 50,000 - 99,000
- 100,000+



CHARGE POINTS BY COUNTRY

octopus ELECTROVERSE



CHARGE POINTS PER 100K INHABITANTS

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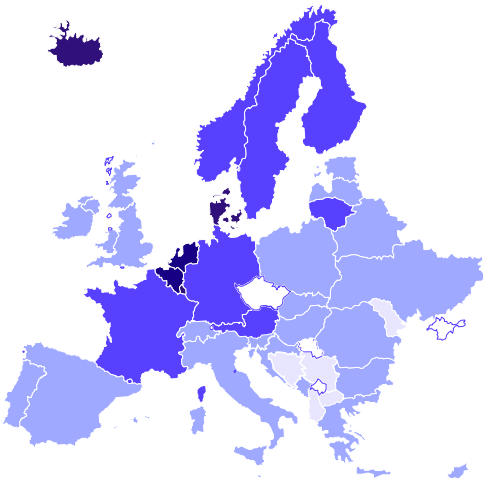
< 10

10 - 199

200 - 749

750 - 1000+



CHARGE POINTS PER 100K INHABITANTS

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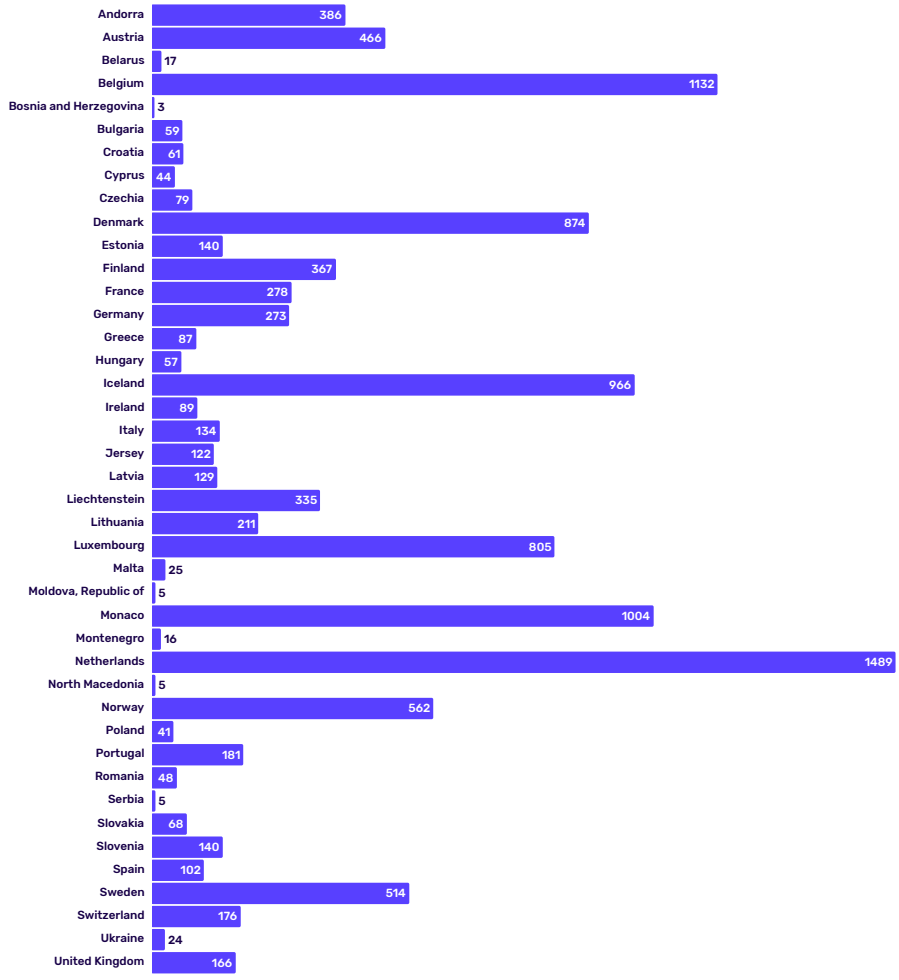
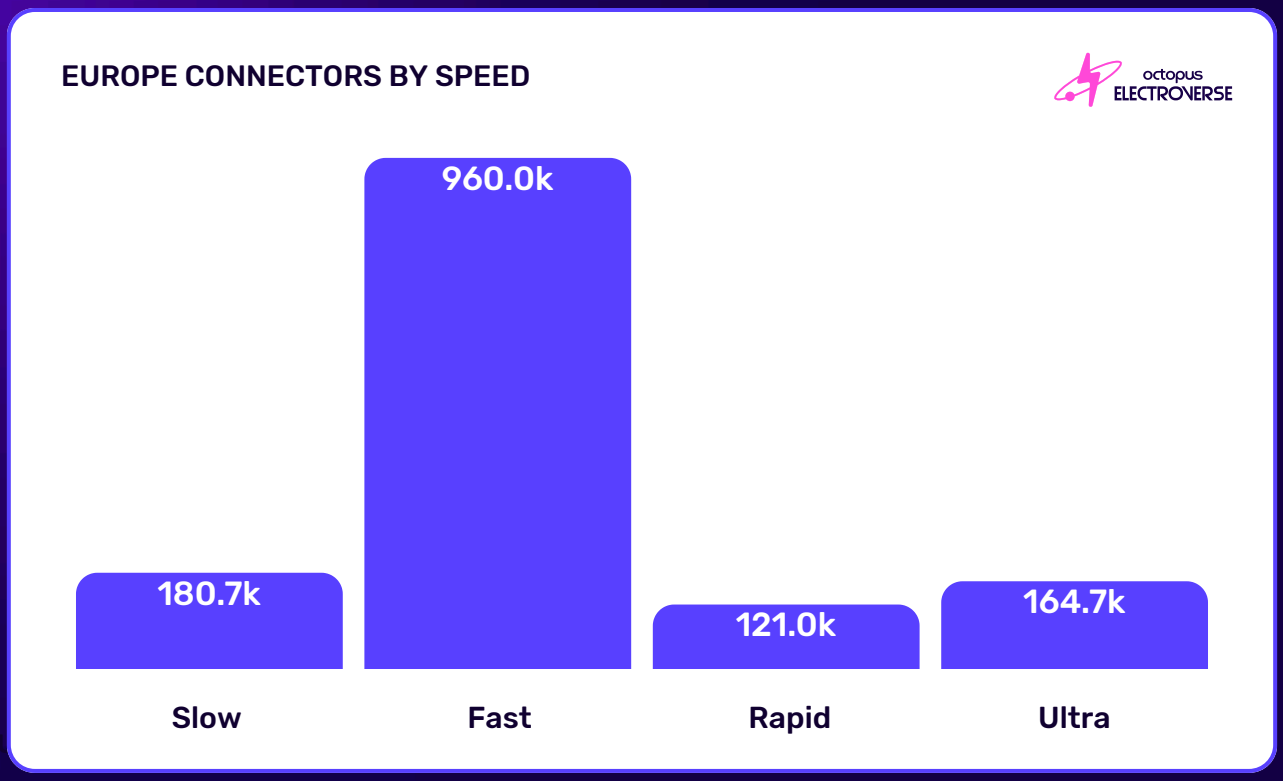
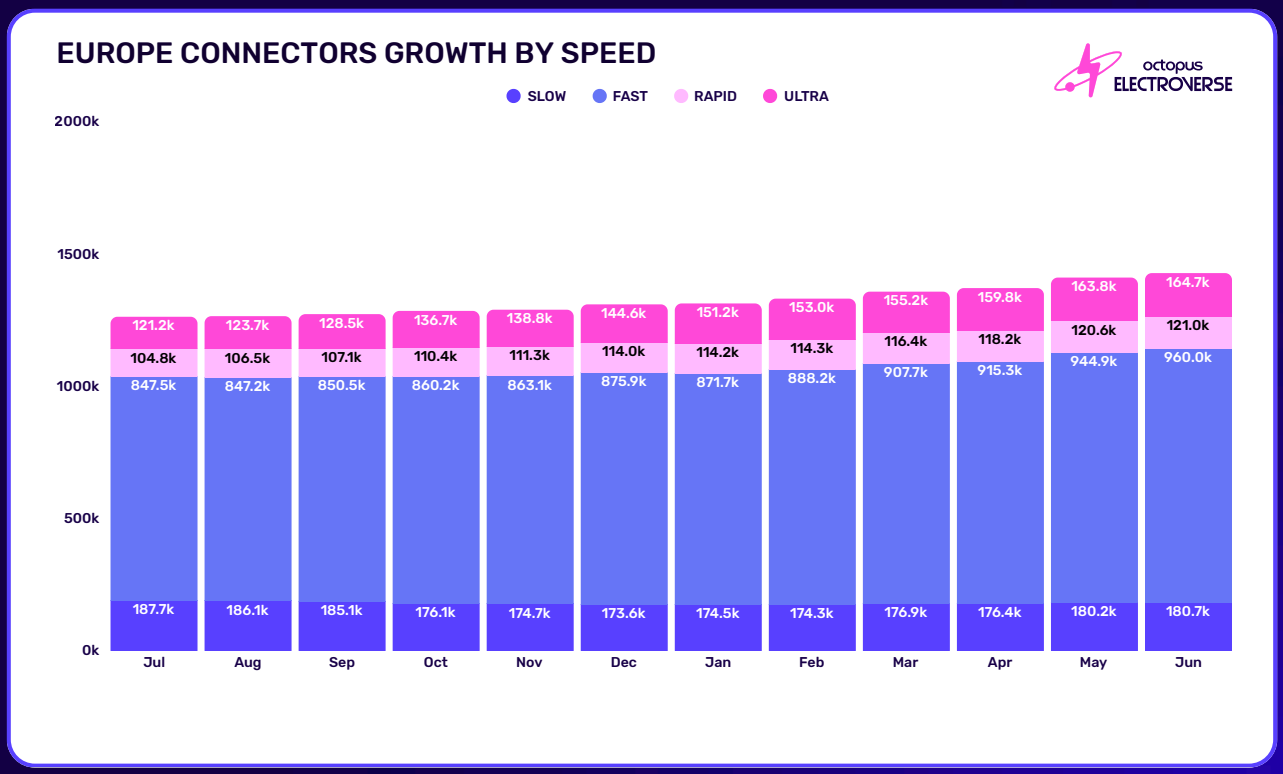


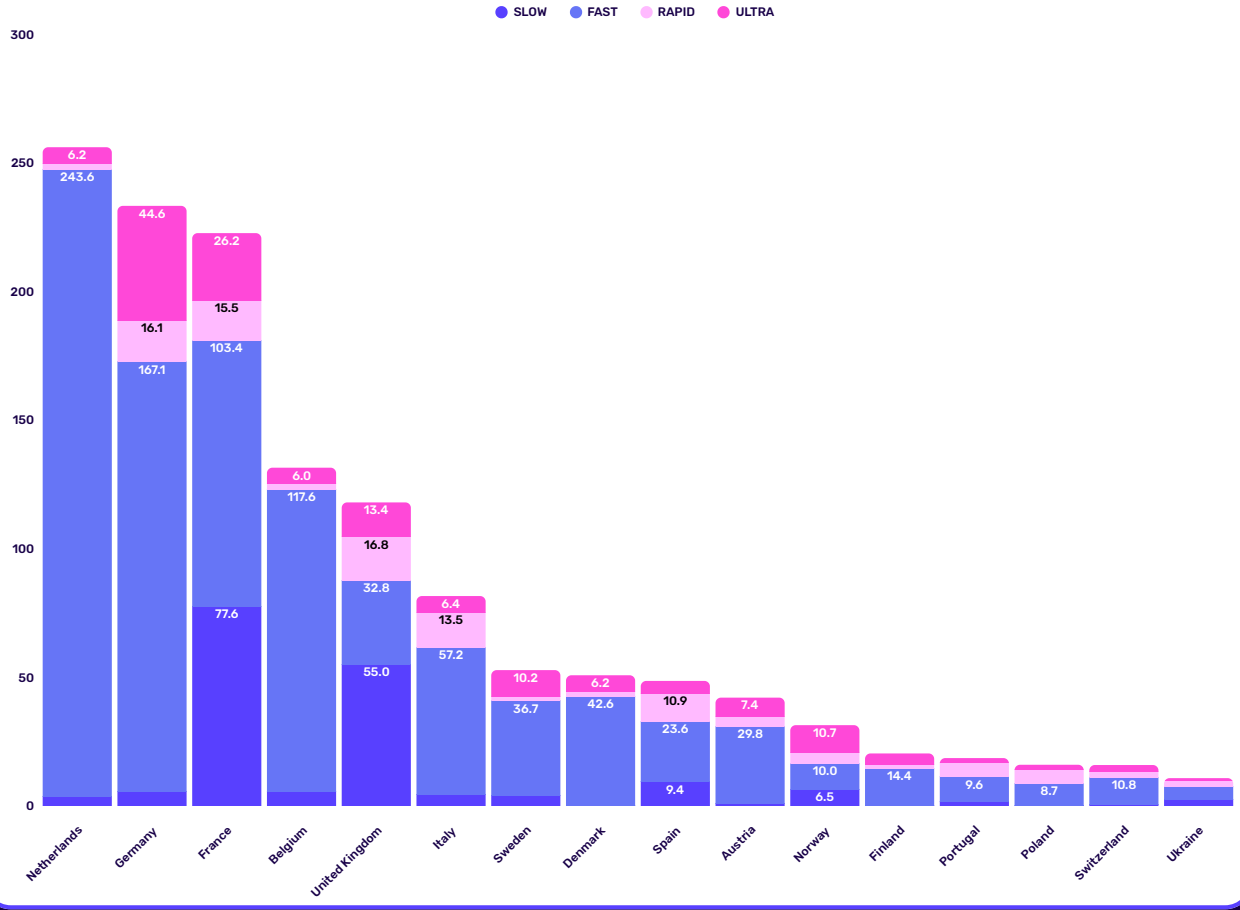
SPEED



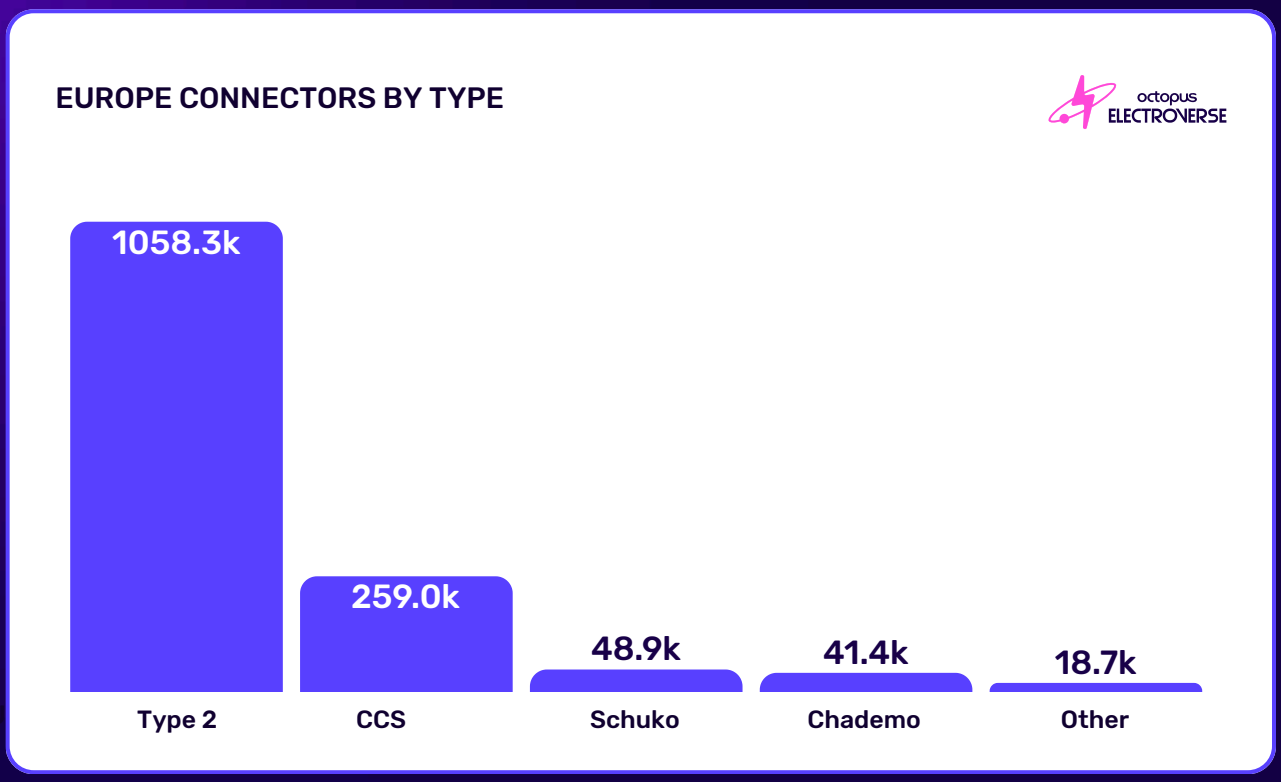
These graphs demonstrate the current state of charging speeds across Europe and offer insight into potential future trends. 8 - 50 kW fast charging speeds dominate Europe, contributing around **67%** of total connectors - comparatively, the UK has a greater number of slow charging connectors (**47%** relative to the total number). However, ultra-rapid is the fastest-growing segment of charging across both the UK and Europe.



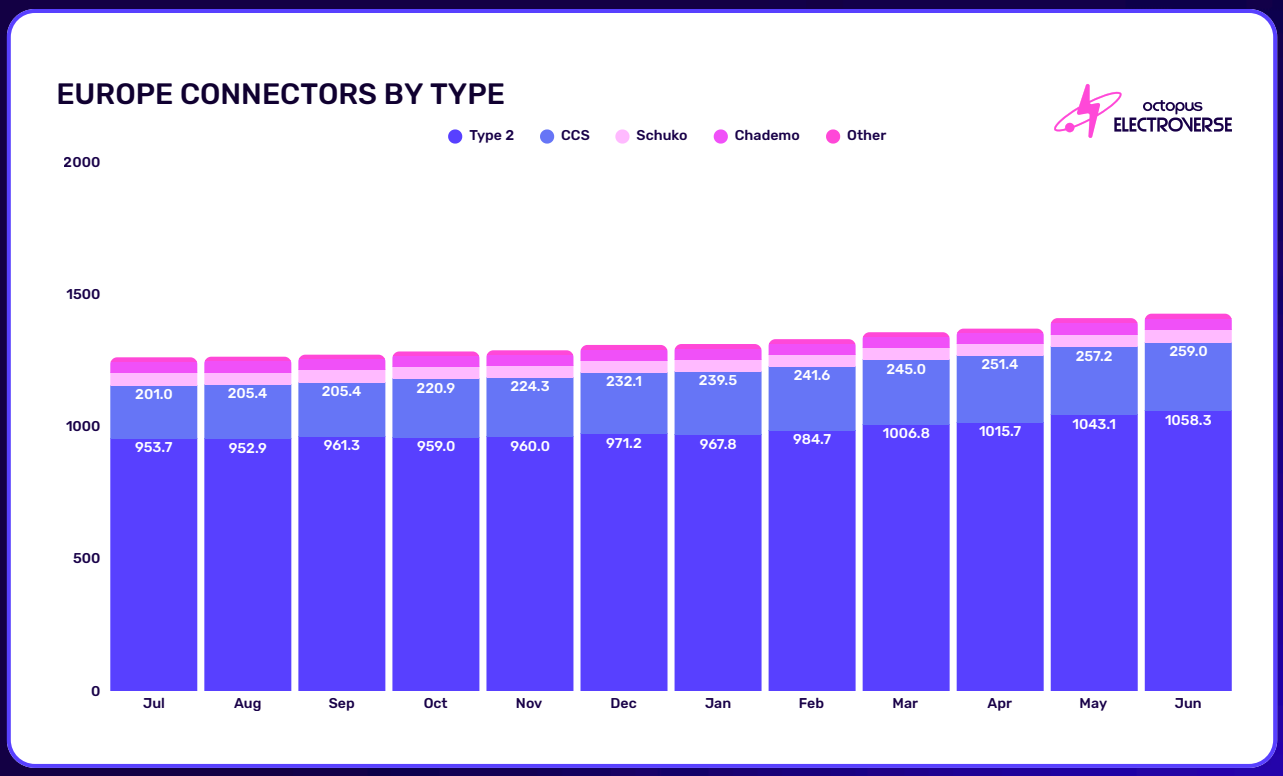
NUMBER OF CONNECTORS BY SPEED AND COUNTRY IN EUROPE (>10,000 CONNECTORS)



STANDARD TYPE

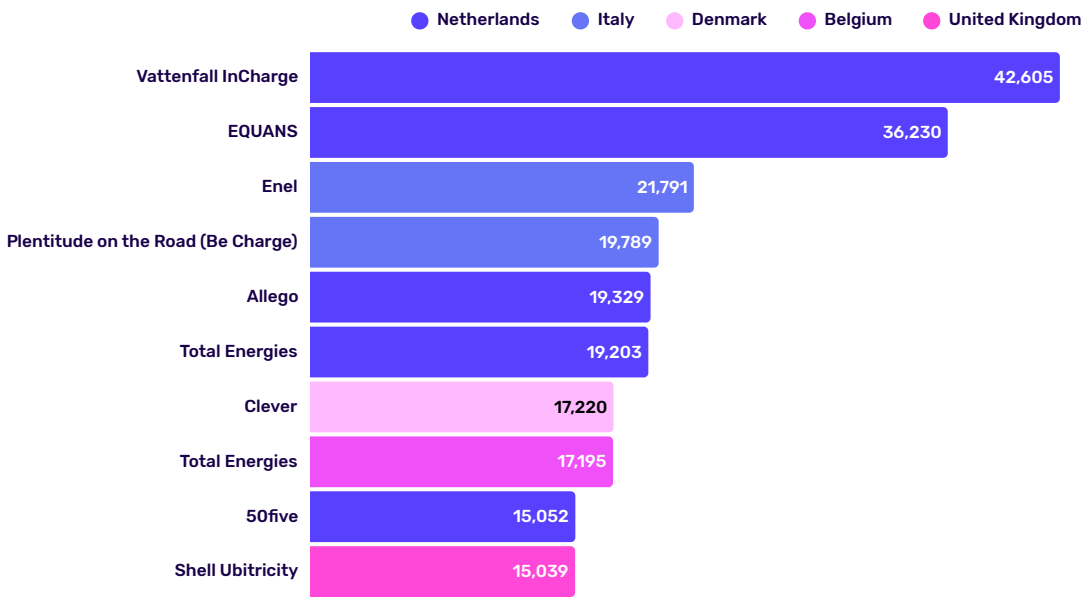


Connector trends across Europe closely mirror those seen in the UK. Market growth is being fuelled by the widespread rollout of Type 2 and CCS connectors, now standard on all new vehicle models. In contrast, CHAdeMO connector numbers have remained steady, continuing to support older vehicles still in use. Europe also has many Schuko connectors (similar to a standard household socket), though this category has shown little change and, as expected, is not an area of growth.

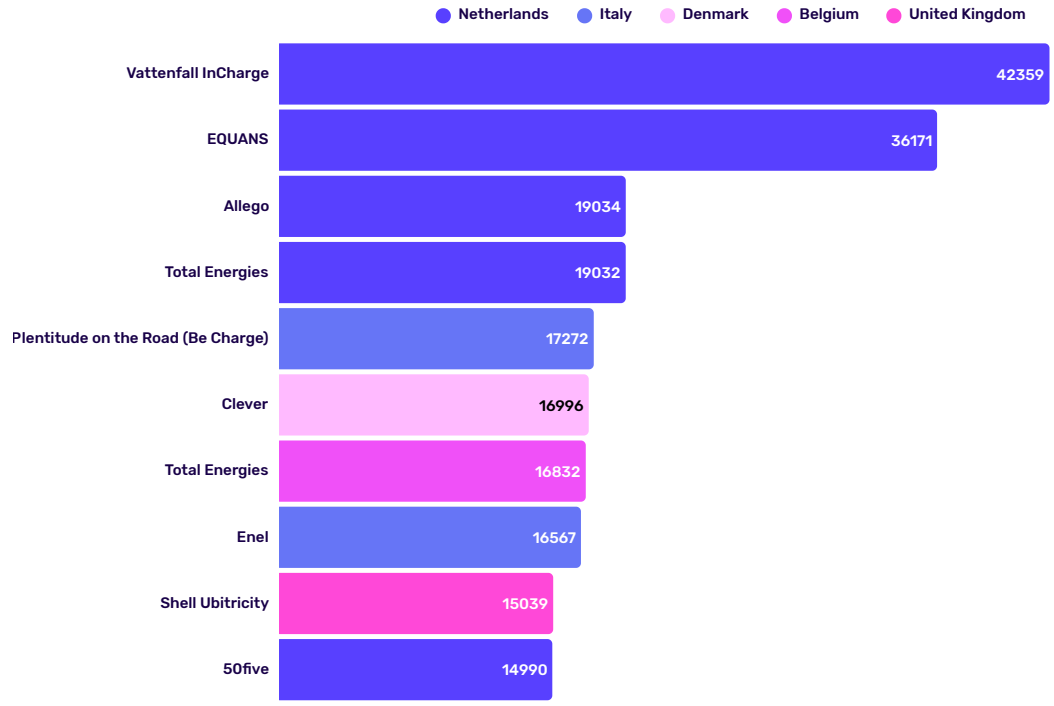


CHARGE POINT OPERATORS

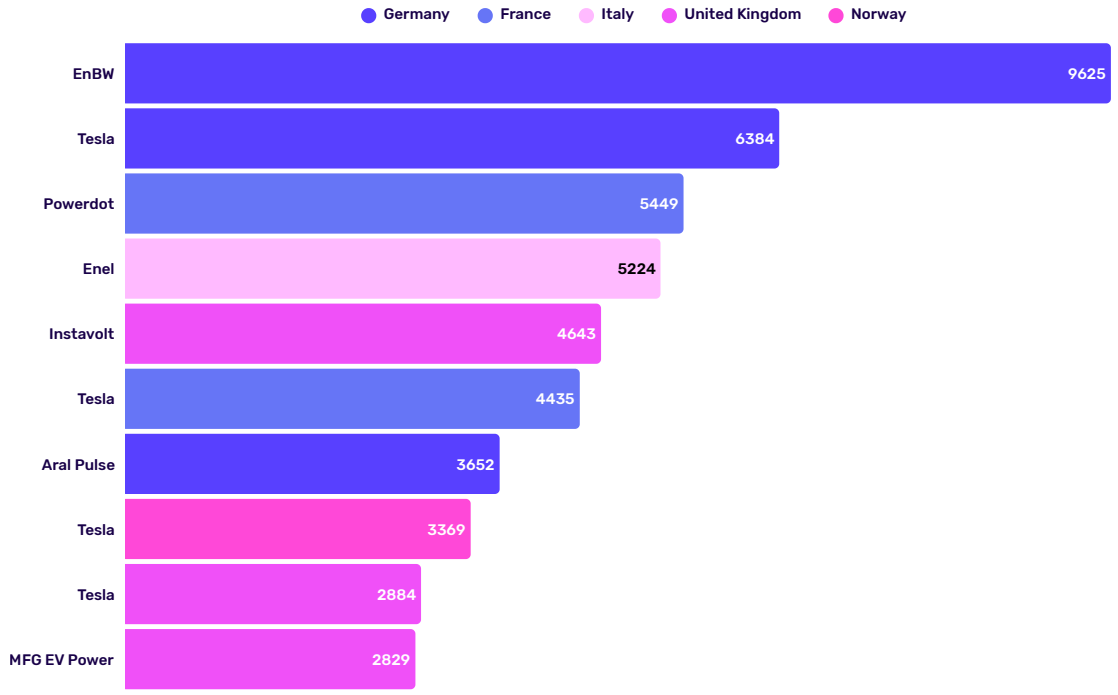
LARGEST OPERATORS IN EUROPE - CONNECTORS



LARGEST SLOW/FAST OPERATORS - CONNECTORS



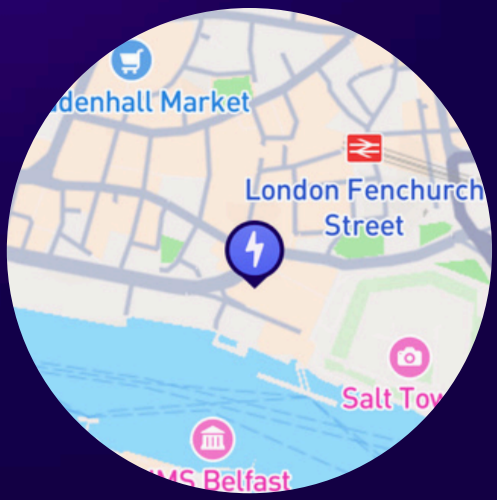
LARGEST RAPID/ULTRA OPERATORS - CONNECTORS



DEFINITIONS

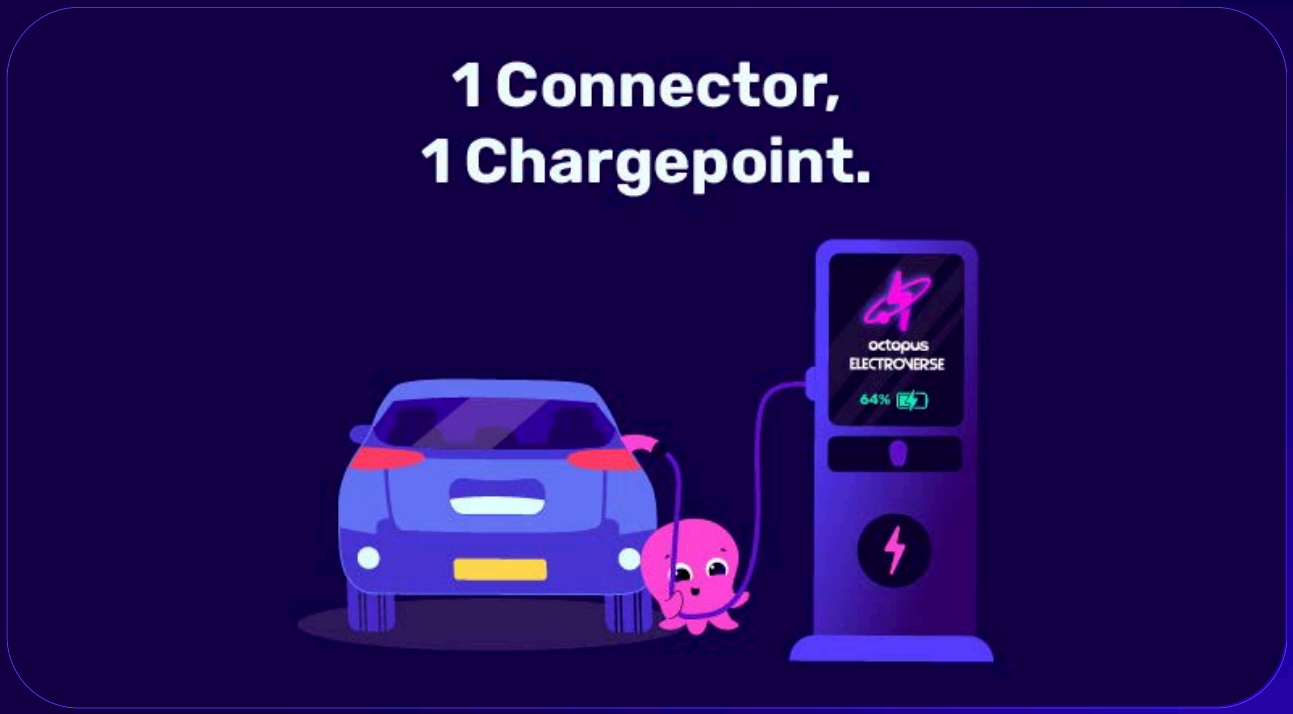
DEFINING A CHARGE POINT

We use the term ‘charge point’ to simplify the language - in the industry this is known as an ‘EVSE’, which stands for **Electric Vehicle Supply Equipment**. An EVSE is an independently operated and managed part of a charge point, that is **able to deliver energy to one EV at a time**. This is the industry-approved definition and forms part of the data structure we receive from Charge Point Operators (CPOs).

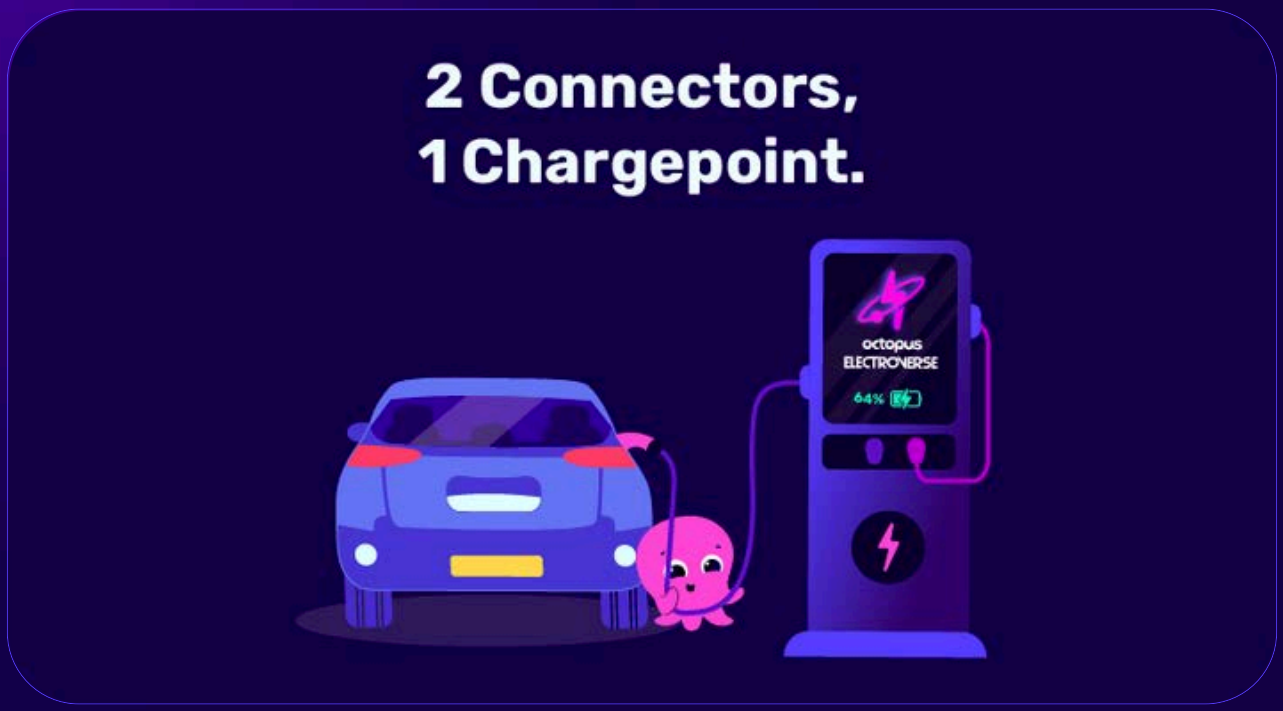


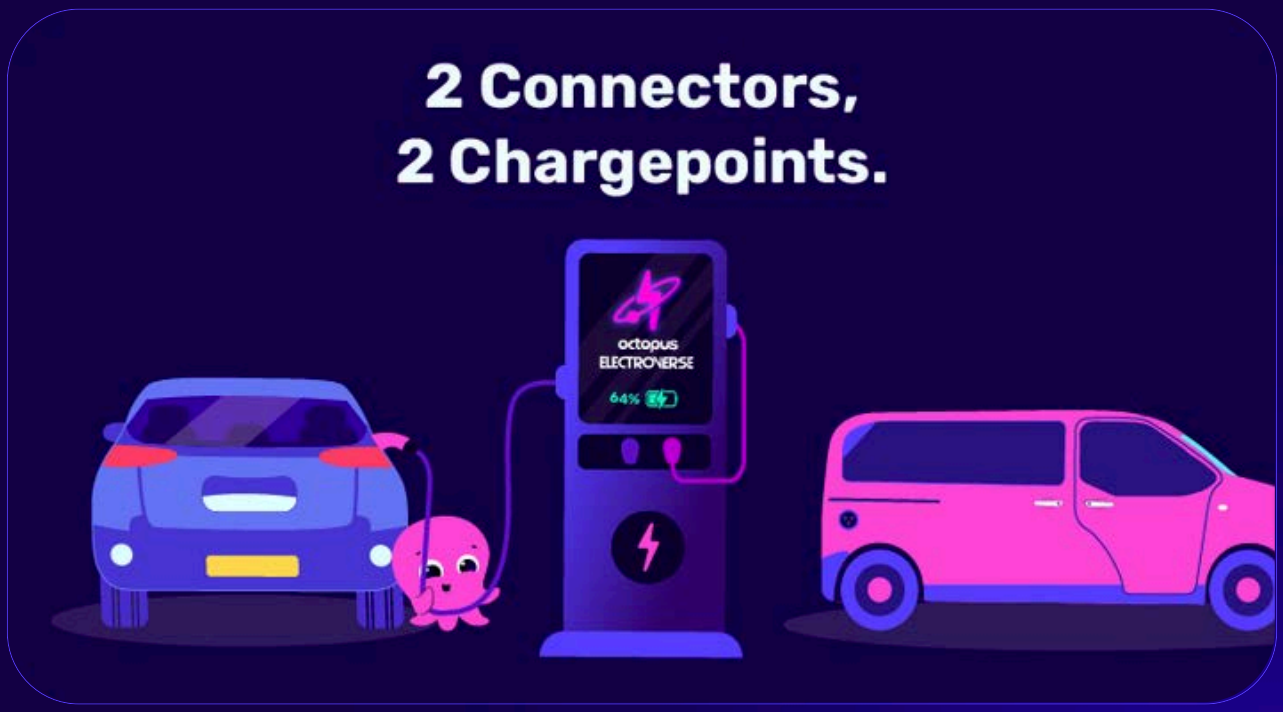
A **location** is a physical site where there are one or more charge points. Think of a location as a single pin on the Octopus Electroverse map!

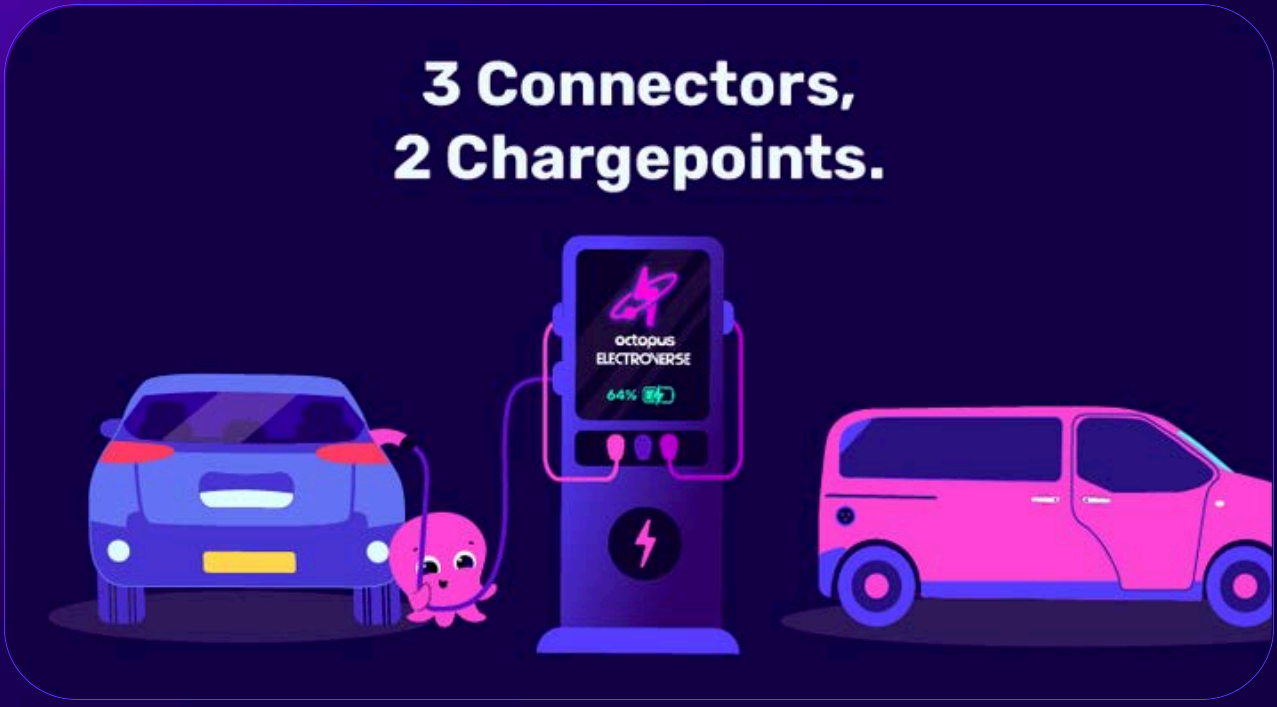
The EVSE hardware inside each charging unit determines how many vehicles can simultaneously charge at the same unit. A basic charge point has **one connector** and therefore **one charge point** that can be used to **charge one vehicle** independently.



While a charging unit may have **a choice of connectors**, sometimes, it may only have the capability to **charge one vehicle** at a time, defining it as a **single charge point**. Here are some more examples:

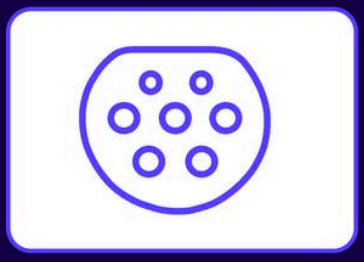






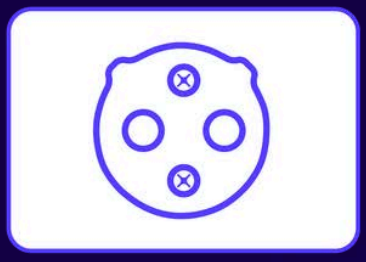
VISUALS OF CHARGING SOCKET TYPES

Currently, there are three main charging socket types: Type 2, CHAdeMO and CCS.



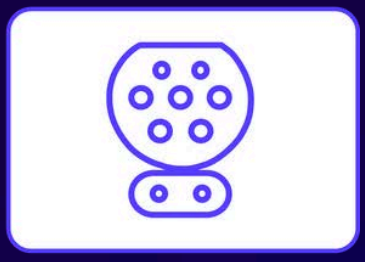
TYPE 2

Type 2 sockets will typically be reserved for slow charging speeds, delivering AC power.



CHAdeMO

CHAdeMO was the first type of DC socket, but is largely being replaced by CCS.



CCS

CCS sockets are capable of delivering large amounts of power, so are typically found on rapid and ultra-rapid charge points.

GLOSSARY

CPO

Charge Point Operator. The mobility provider managing the charging infrastructure (e.g. IONITY, Osprey, Shell Recharge, Connected Kerb etc).

EVSE

Electric Vehicle Supply Equipment. An EVSE is an independently operated and managed part of a charge point, that is able to deliver energy to one EV at a time.

kW

A kilowatt represents the rate of power (e.g. a charger's output). The higher the kW rating of a charger, the faster it can charge an EV.

kWh

A kilowatt-hour is the unit used to measure the number of kW used (e.g. charging prices are stated in kWh, and charging sessions are measured in kWh).

kW vs. kWh

Simply put, a kWh reflects the total amount of electricity used, whereas a kW reflects the rate of electricity usage.

SOURCES & REFERENCES

The Society of Motor Manufacturers and Traders (SMMT) : https://www.smmt.co.uk/

The European Automobile Manufacturers' Association(ACEA) : https://www.acea.auto/

Open Charge Point Interface (OCPI) : https://evroaming.org/

Population of European Countries) : https://www.statista.com/statistics/685846/population-of-selected-european-countries/

UK Population by Region : https://www.statista.com/statistics/294729/uk-population-by-region/

All other data : The Octopus Electroverse database