



octopus  
**ELECTROVERSE**

**CHARGING INFRASTRUCTURE INSIGHTS  
UK & EUROPE**

**MARCH 2026**

# HIGHLIGHTS OF THE MONTH

## **UK Market Scale and Driver Behaviours**

As of March 2026, the UK hit a new milestone, with its public network expanding to 110,000 charge points.

While regional charger density places Greater London and the South East in the top spots, when analysing charge points per 100k inhabitants, the geography is varied, with the West Midlands, North East and Wales among the top five regions.

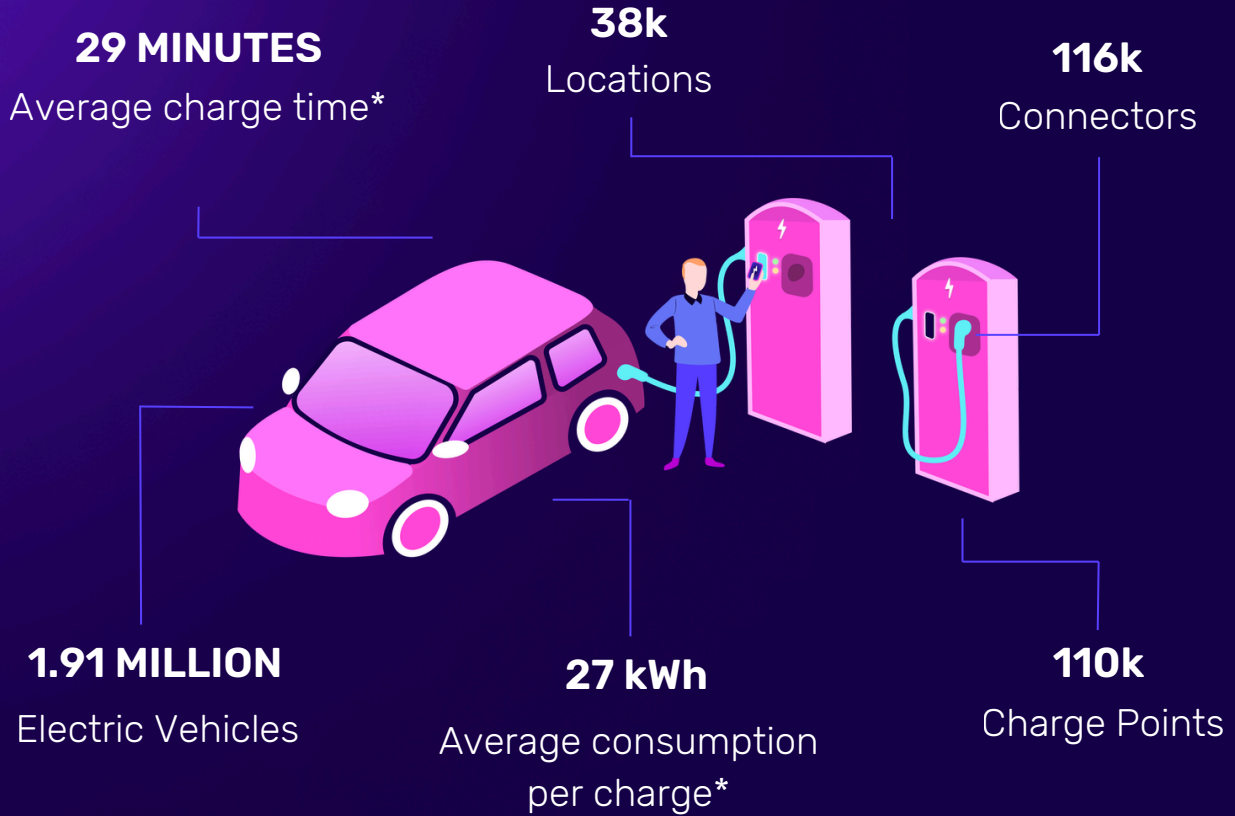
Across the UK, driver behaviour and charging patterns depend heavily on the time of day and driver preferences. Rapid and Ultra-Rapid charging stations experience their highest utilisation during the day, serving drivers who want to top up quickly while travelling. Despite making up about 25% of total UK connectors, Ultra and Rapid speeds deliver over 55% of the total energy volume consumed.

## **The European Perspective**

While the UK has a high proportion of slow chargers to support residential needs, the broader European market is dominated by Fast charging (8 - 49 kW), which accounts for approximately 68% of total connectors.

And when looking at charger scope, the Netherlands extensive coverage continues to set the benchmark with 1,493 charge points per 100k inhabitants - 33% more than the region with the second-most charge points per 100k inhabitants, Belgium.

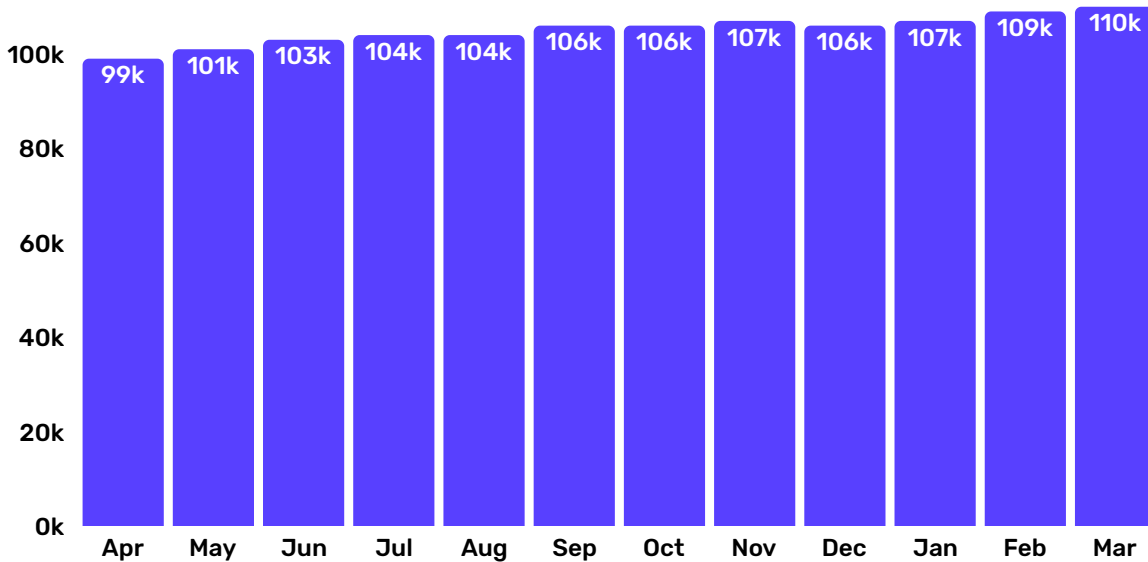
# UK HEADLINE STATISTICS



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

In March 2026, the UK's total number of charge points was around 110k. 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.

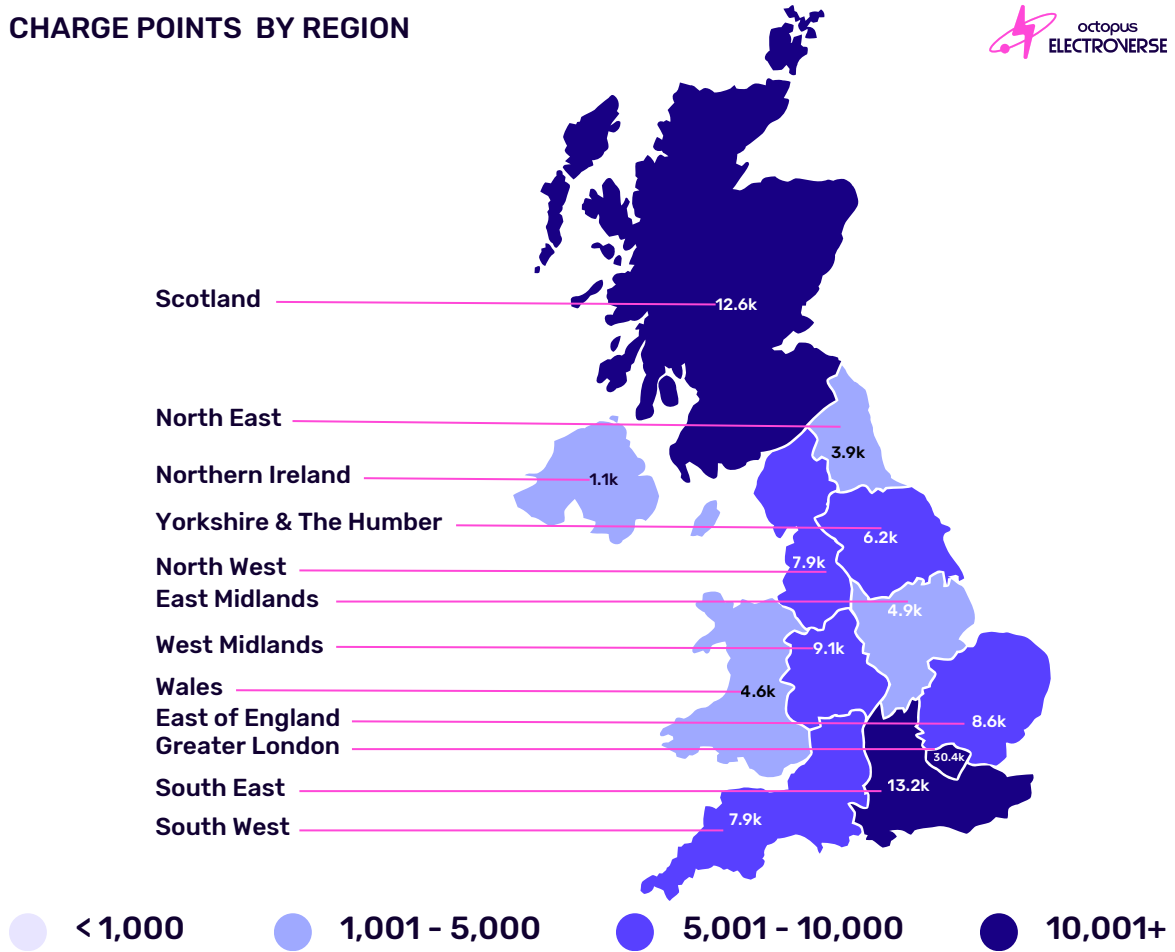
## UK CHARGE POINTS GROWTH



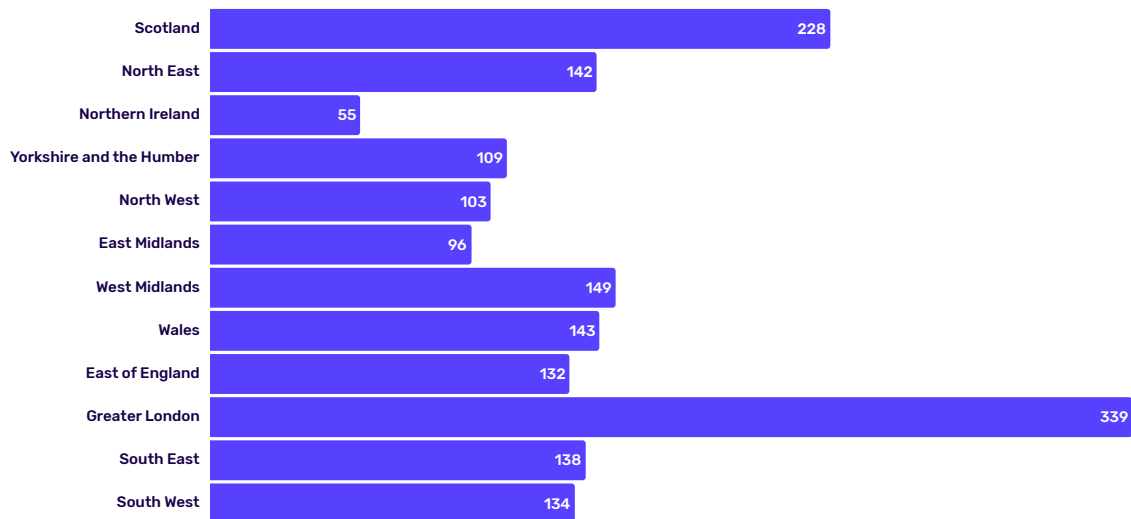
100K

# CHARGING INFRASTRUCTURE ACROSS THE UK

## CHARGE POINTS BY REGION



## CHARGE POINTS PER 100K INHABITANTS

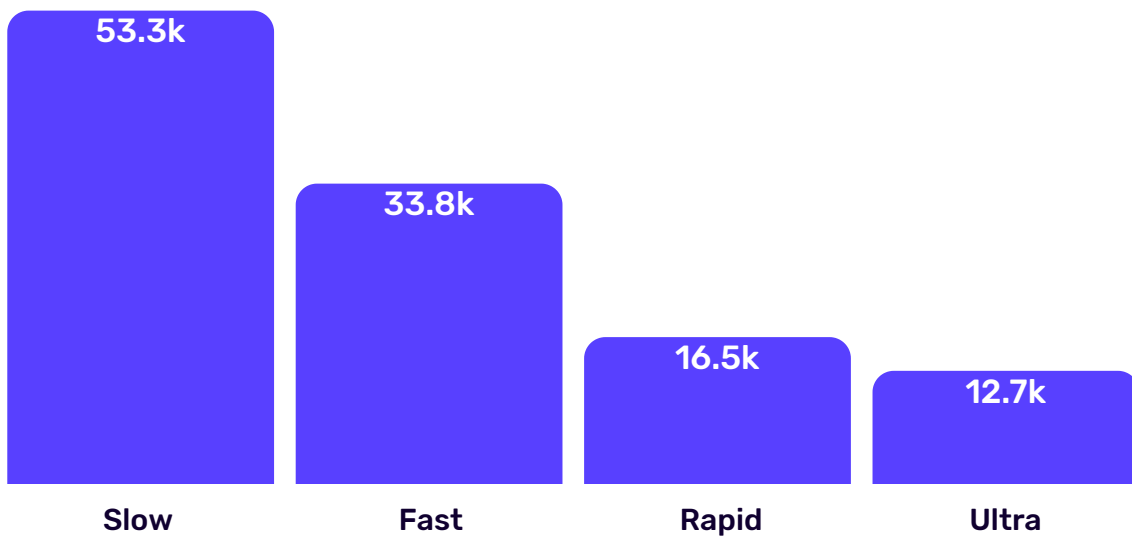


# CHARGER CHARACTERISTICS

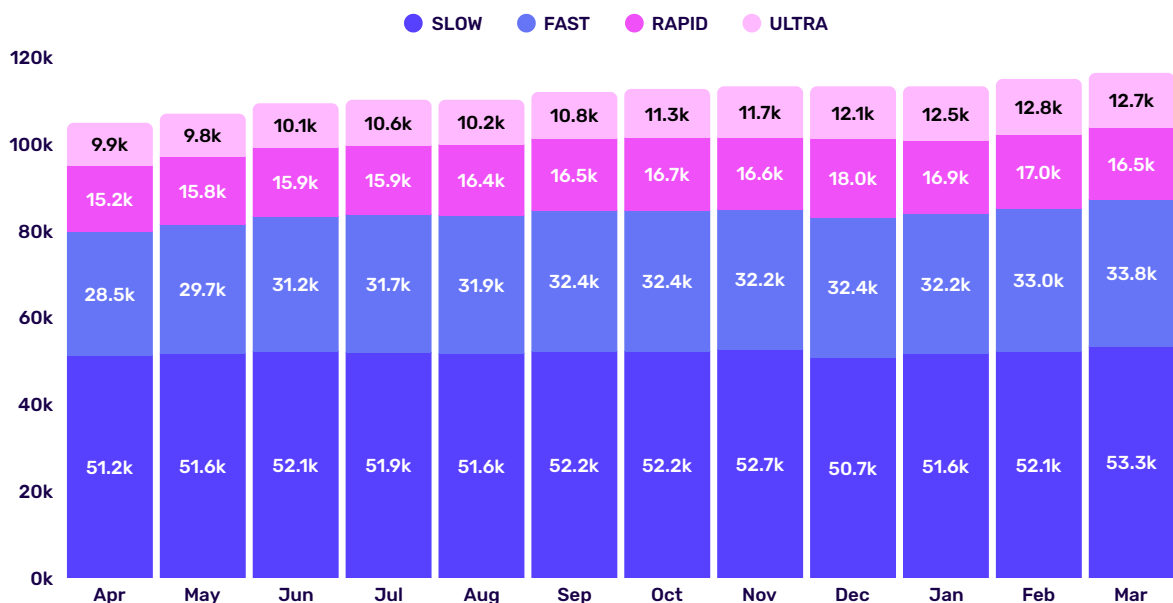
## SPEED

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 **46%** of the total connectors, with rapid and ultra-rapid contributing around **25%**. 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



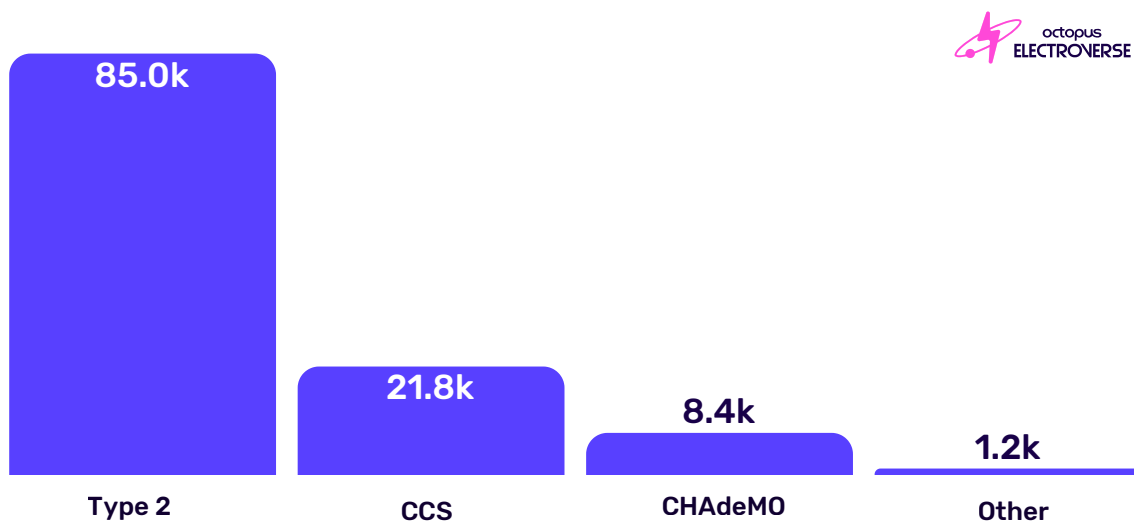
### UK CONNECTOR GROWTH BY SPEED



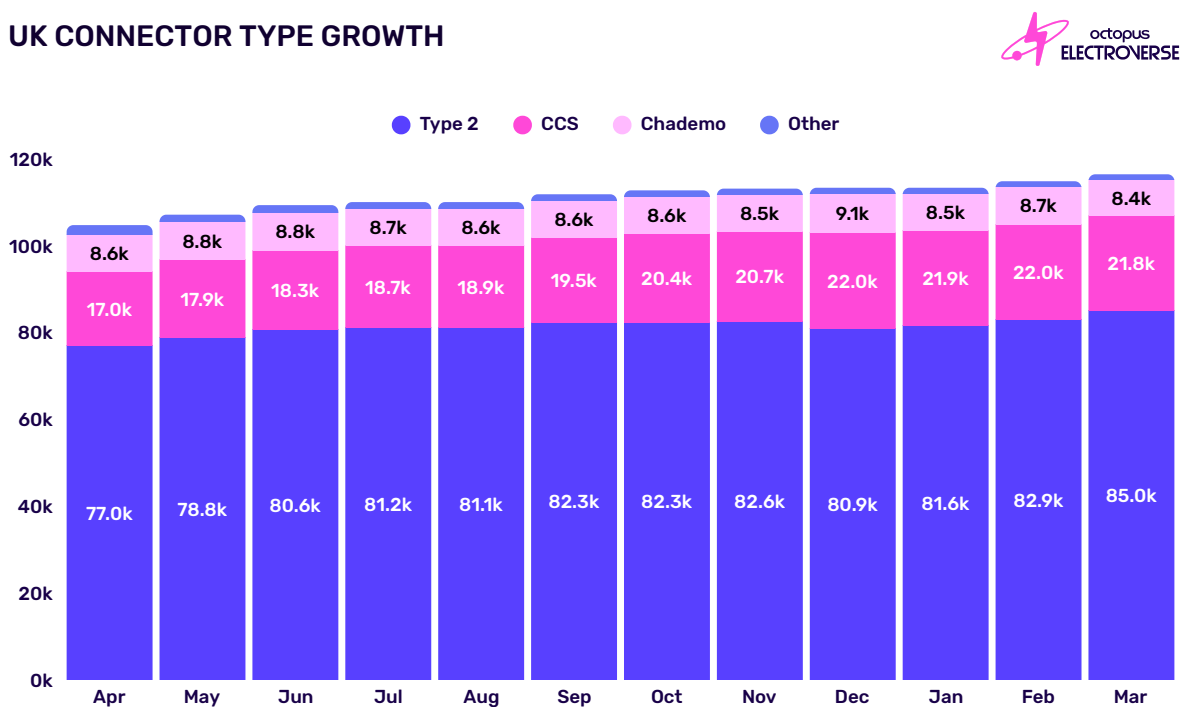
## STANDARD TYPE

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 has remained largely unchanged over the past 12 months, as CCS is gradually replacing this older standard in new vehicles across the UK market.

### UK CONNECTORS BY TYPE



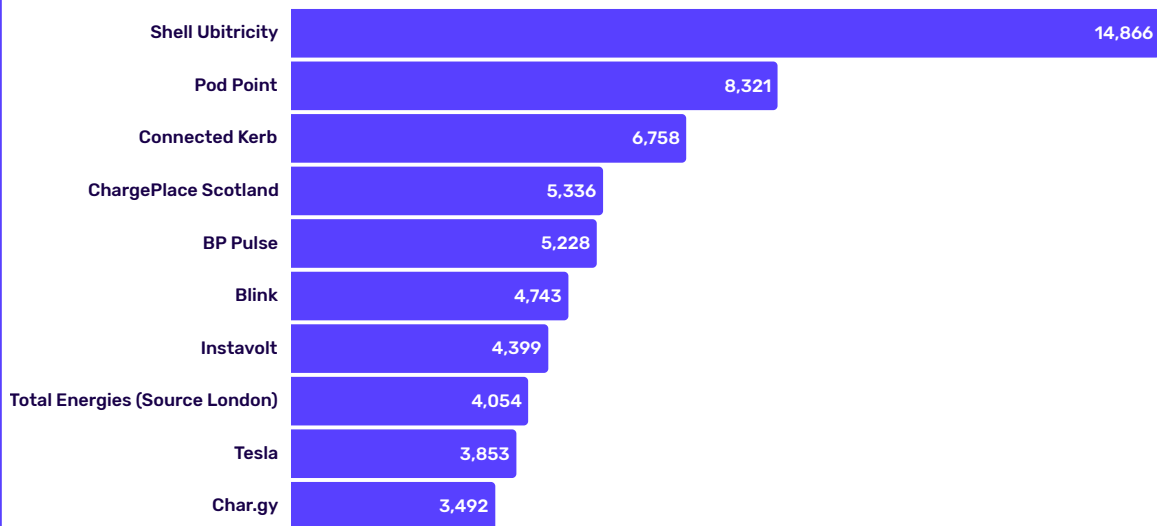
### UK CONNECTOR TYPE GROWTH



## CHARGE POINT OPERATORS

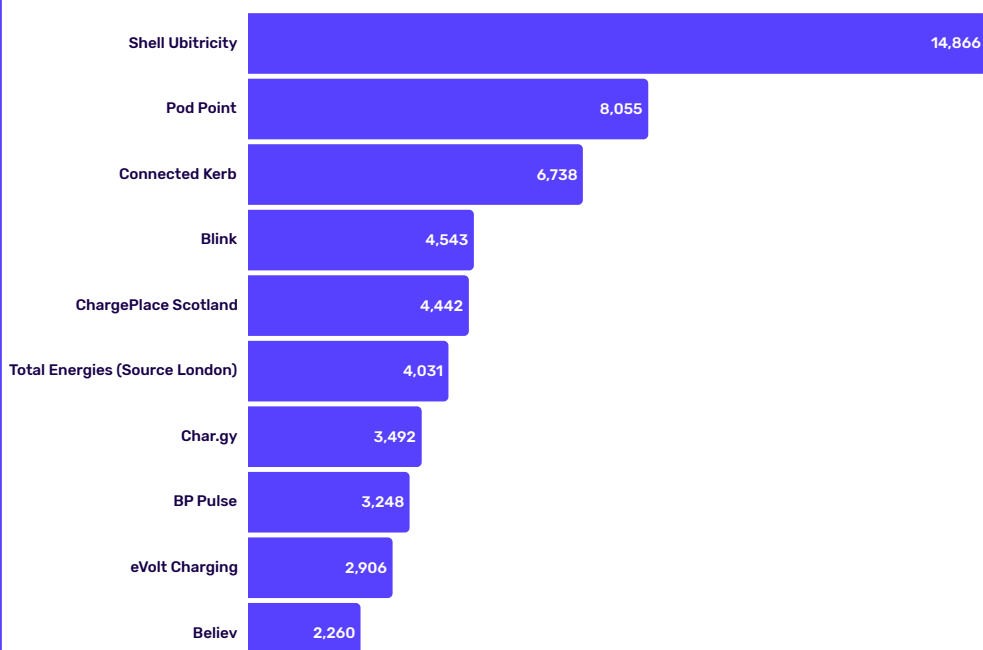
This graph details the largest operators by number of connectors across the UK. Operators, colloquially known as charging networks or 'CPOs', run and maintain the charge points on their network.

### LARGEST OPERATORS - CONNECTORS

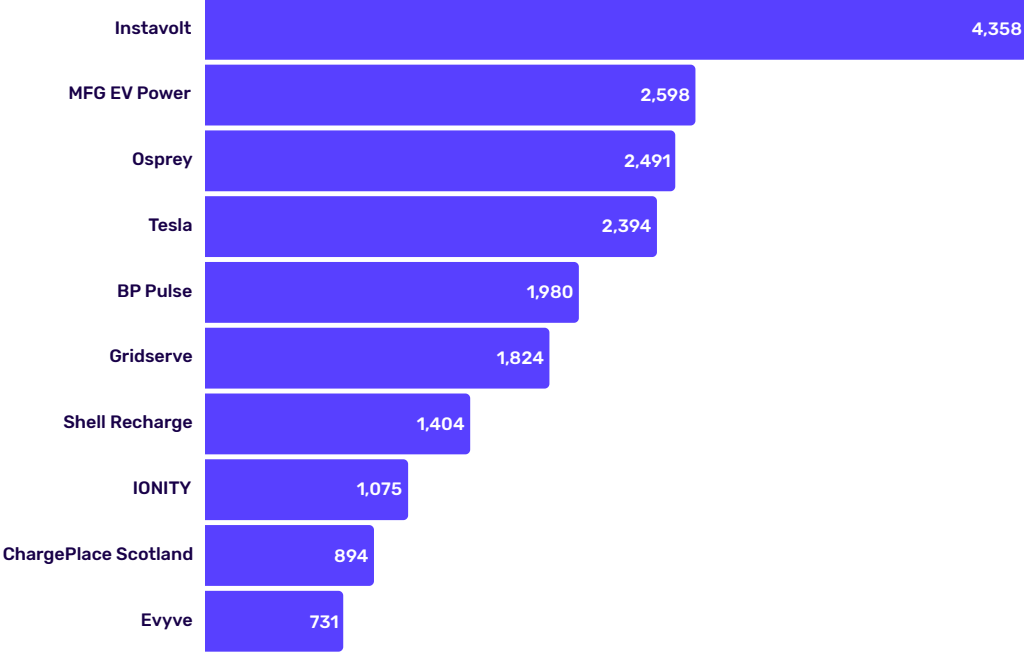


Operators specialising in slower AC charging, like Shell Ubitricity and Pod Point have established a lead in the total number of connectors across the UK. In contrast, InstaVolt & MFG EV Power dominate the rapid DC charging landscape, closely followed by Osprey & Tesla. While many CPOs focus on either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

### LARGEST SLOW/ FAST OPERATORS - CONNECTORS

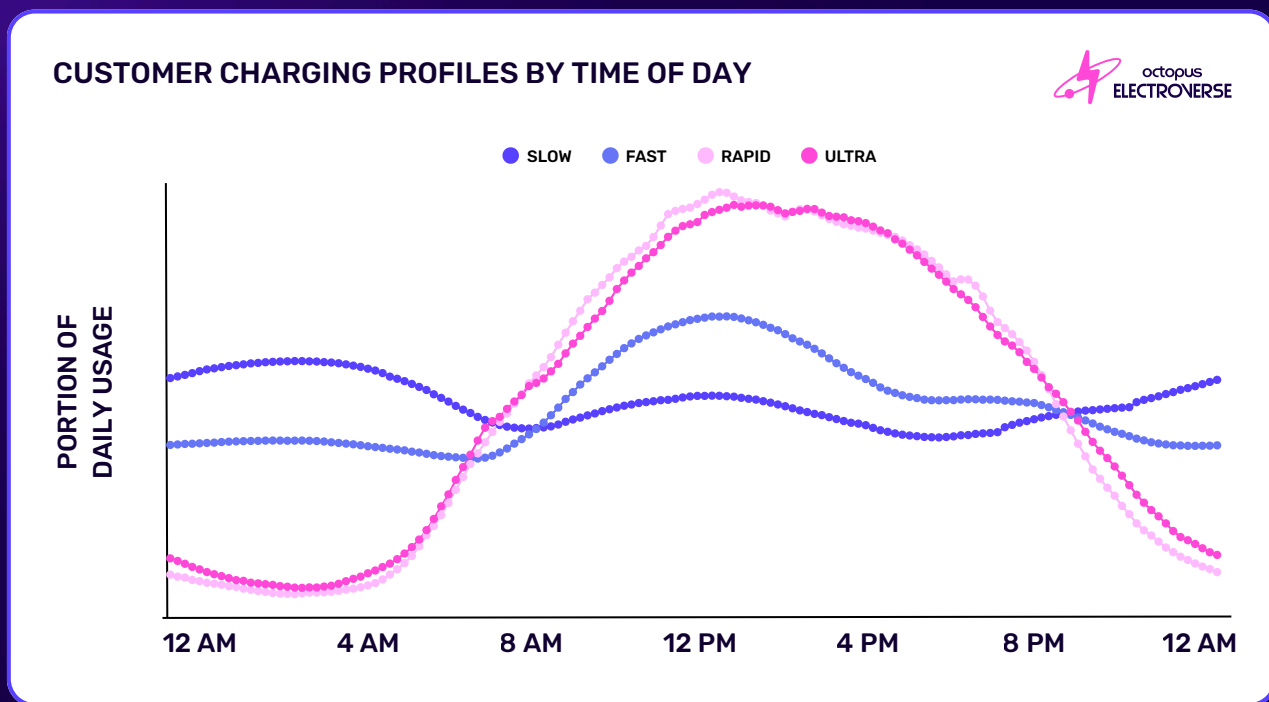


# LARGEST RAPID/ ULTRA OPERATORS - CONNECTORS

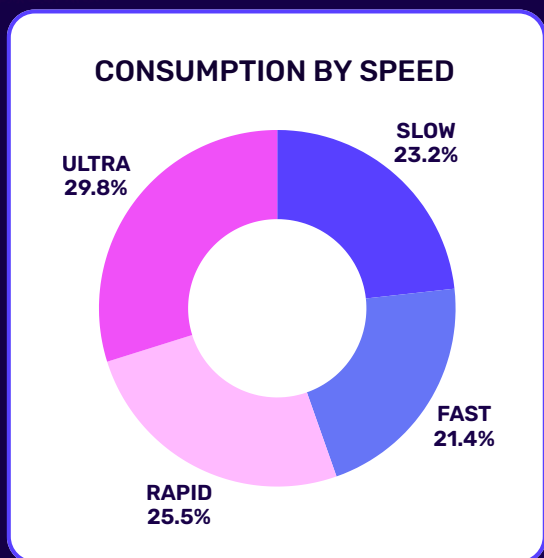


# USAGE PROFILES

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.



Based on Octopus Electroverse consumption data from the last 12 months



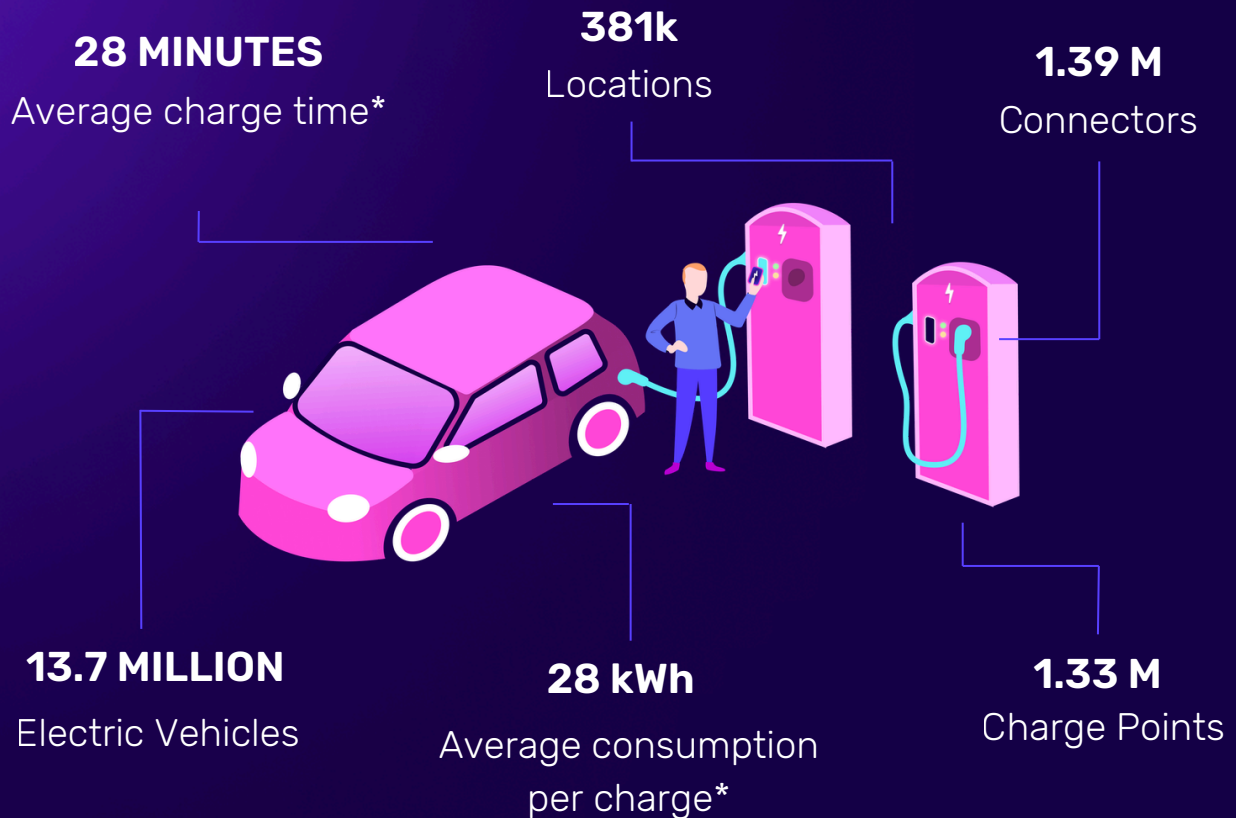
**AVERAGE TIME CHARGING BY SPEED**

SPEED	TIME
SLOW	05 hr 50 minutes
FAST	03 hr 37 minutes
RAPID	00 hr 38 minutes
ULTRA	00 hr 32 minutes

Based on Octopus Electroverse consumption data from the last month

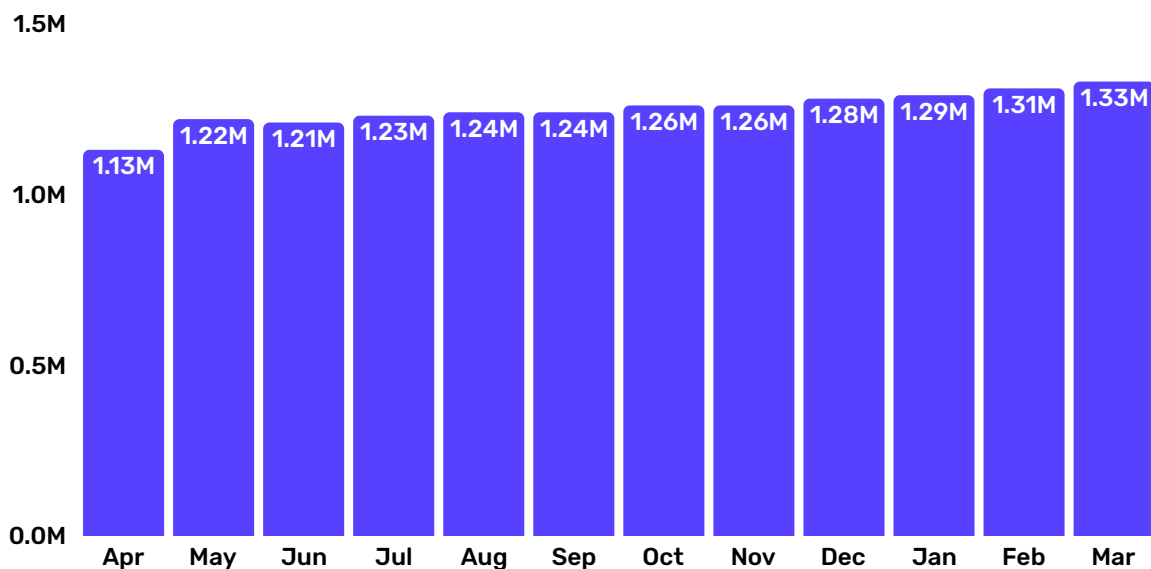
When we look at the distribution of Consumption by Speed, more than **55%** of the total kWh volume consumed by Electroverse drivers is via ultra-rapid & rapid chargers, despite these only accounting for around **11%** and **14%** of total connectors, respectively. This is partly because these connectors can deliver more energy more quickly.

# EUROPEAN HEADLINE STATISTICS



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

## EUROPE CHARGE POINTS GROWTH



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

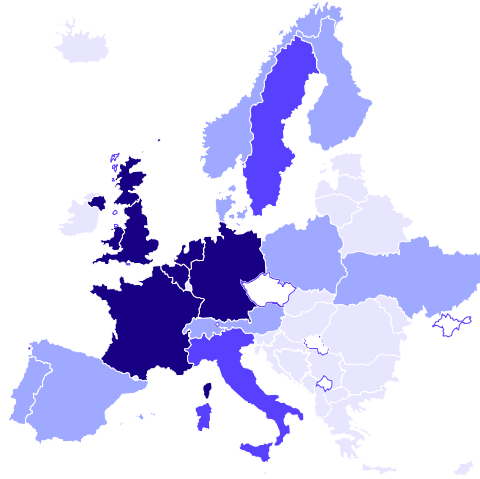
The graphs on the following pages show the mechanisms for achieving this growth vary widely across European markets, both in terms of charging speeds and speed of rollout.

# CHARGING INFRASTRUCTURE ACROSS EUROPE

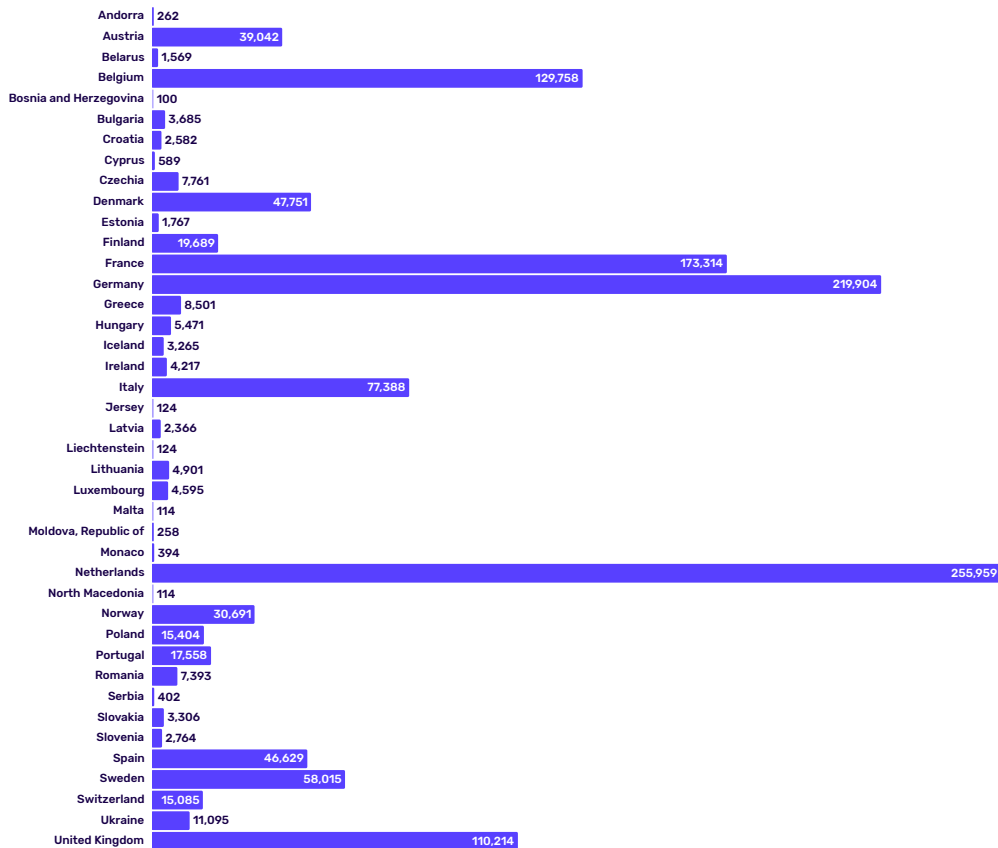
## CHARGE POINTS BY COUNTRY



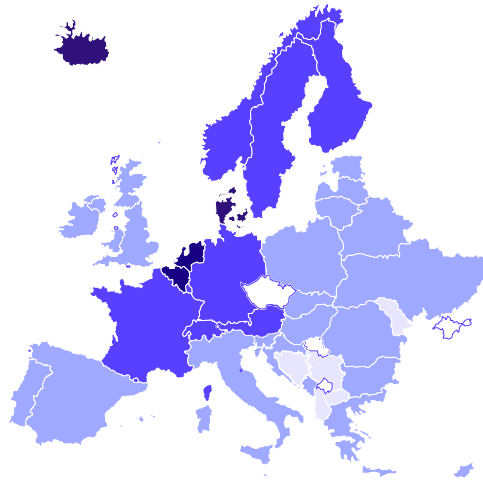
- < 10,000
- 10,000 - 49,000
- 50,000 - 99,000
- 100,000+



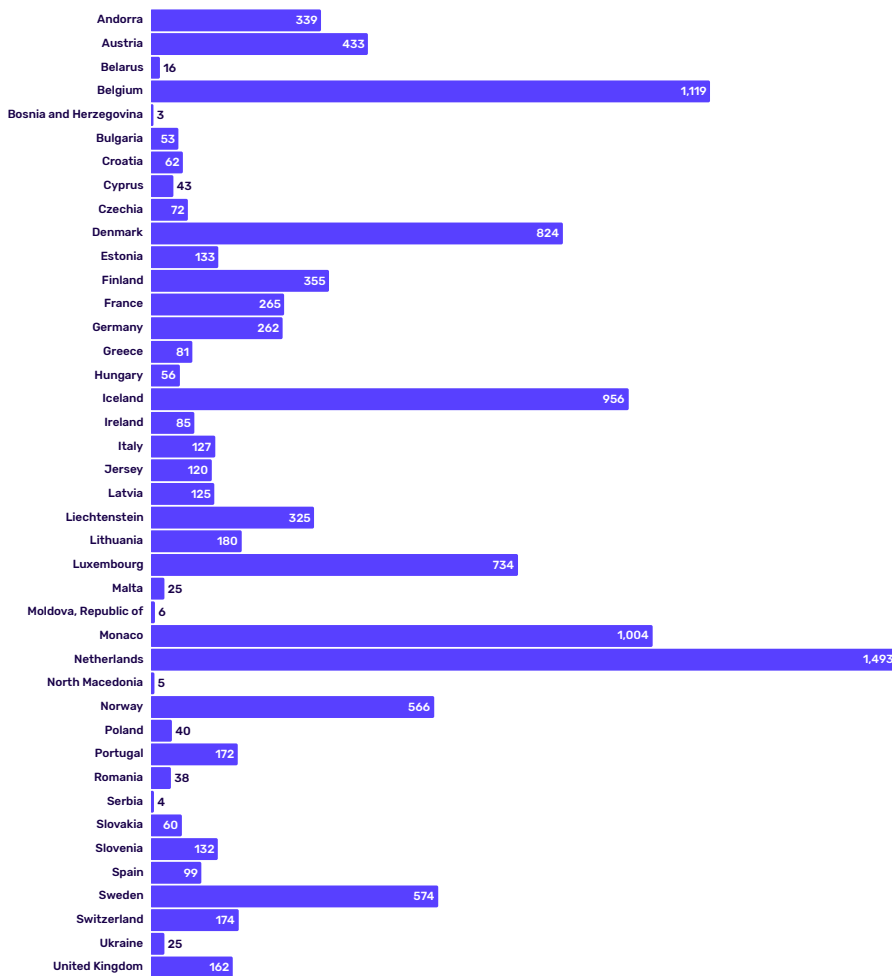
## CHARGE POINTS BY COUNTRY



## CHARGE POINTS PER 100K INHABITANTS

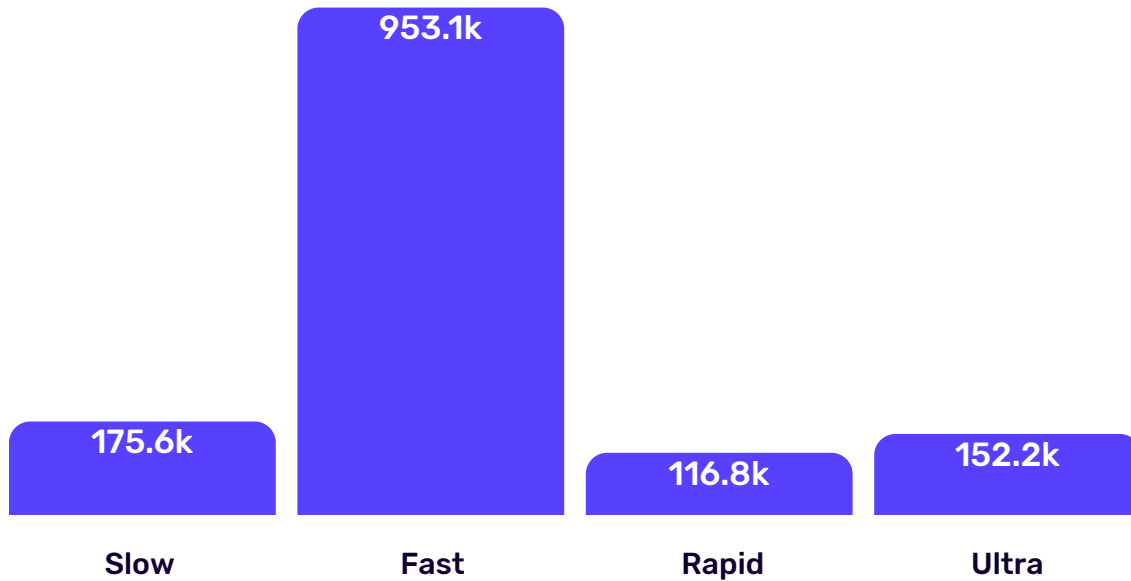


## CHARGE POINTS PER 100K INHABITANTS



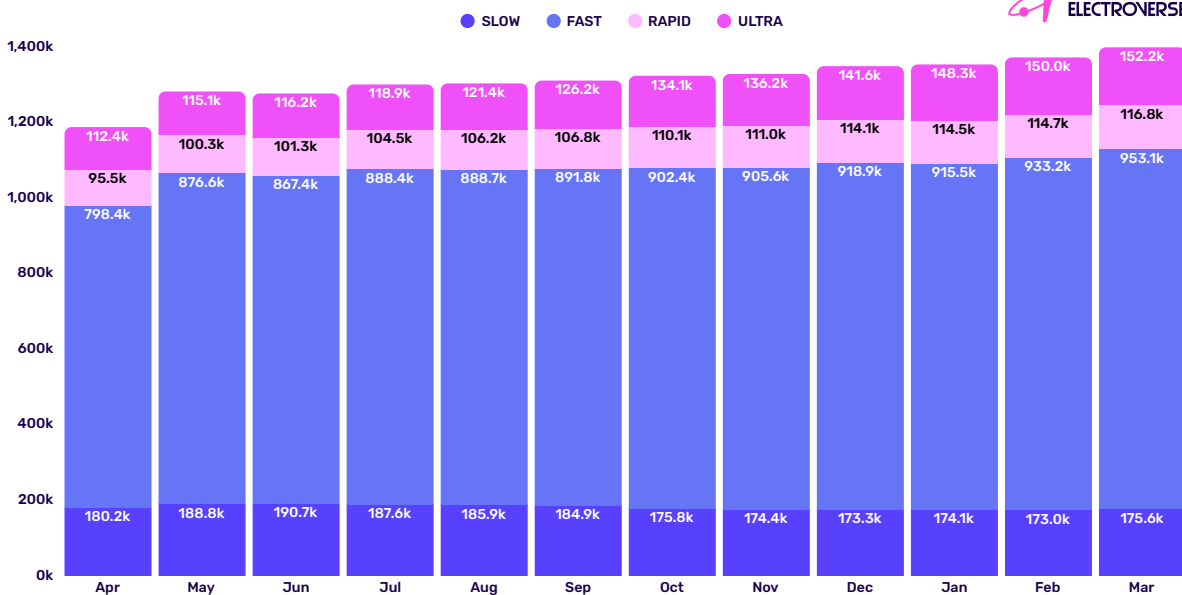
# SPEED

## EUROPE CONNECTORS BY SPEED

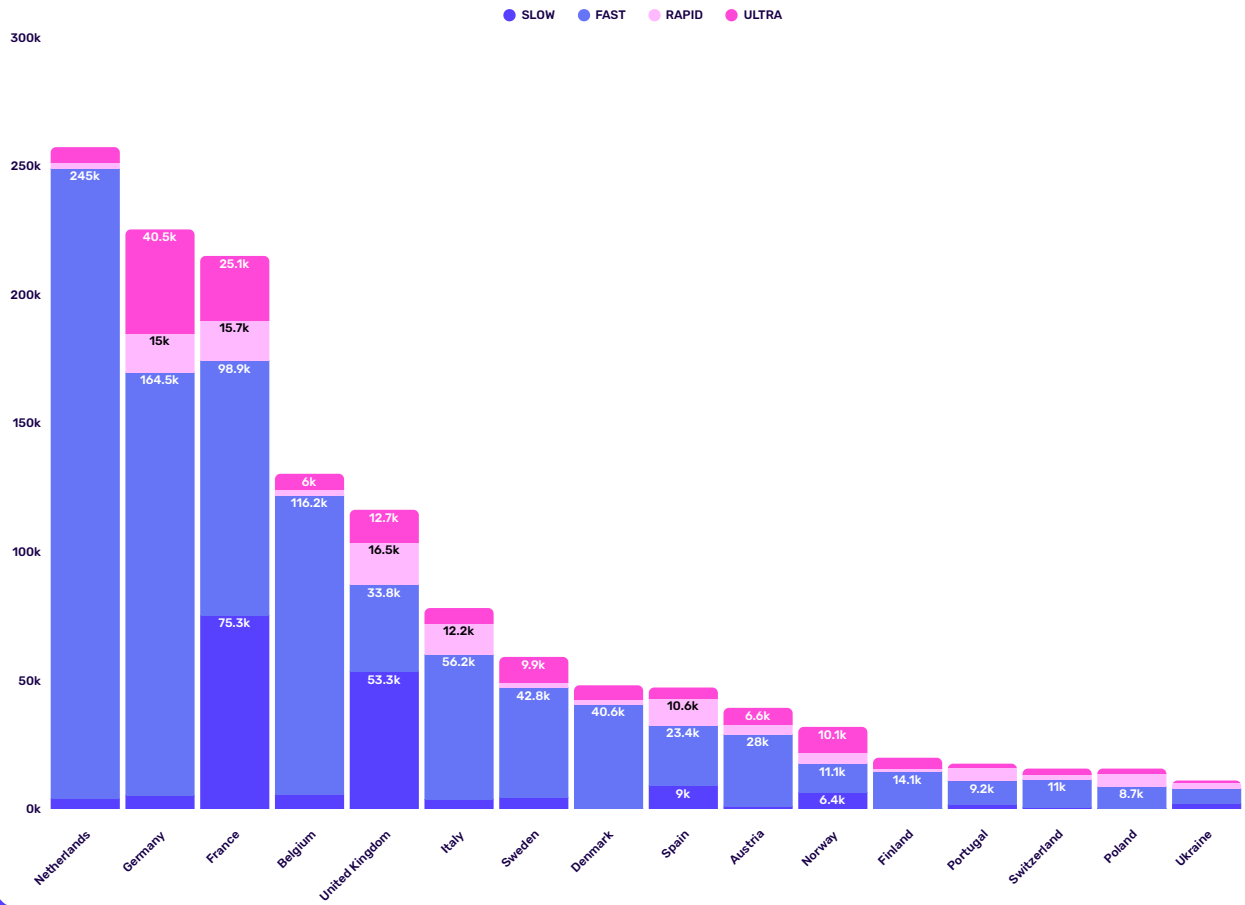


These graphs demonstrate the current state of charging speeds across Europe and offer insight into potential future trends. 8 - 50 kW fast charging speeds dominate Europe, contributing around **68%** of total connectors - comparatively, the UK has a greater number of slow charging connectors (**46%** relative to the total number). However, ultra-rapid is the fastest-growing segment of charging across both the UK and Europe.

## EUROPE CONNECTORS GROWTH BY SPEED

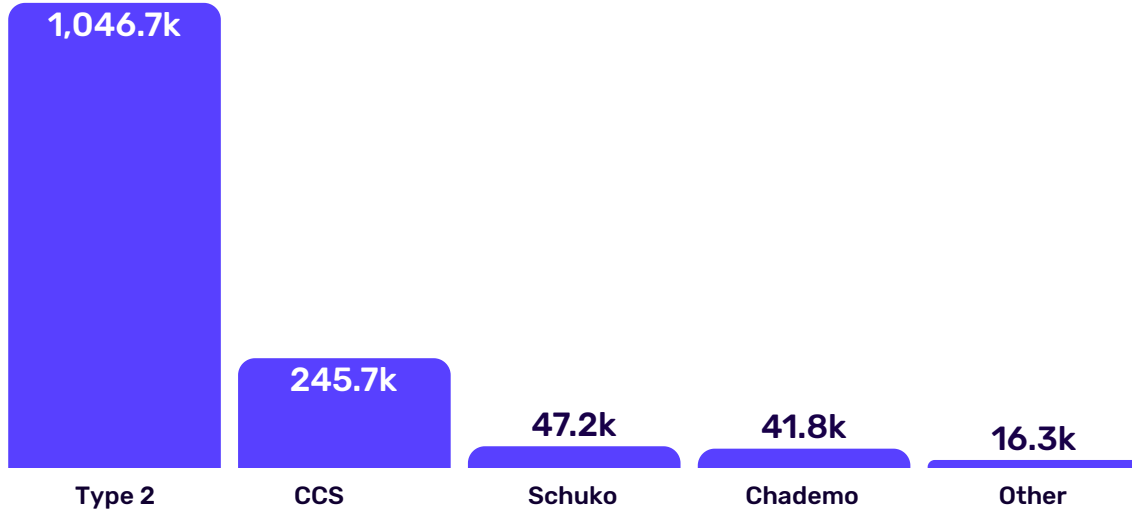


# NUMBER OF CONNECTORS BY SPEED AND COUNTRY IN EUROPE (>10,000 CONNECTORS)



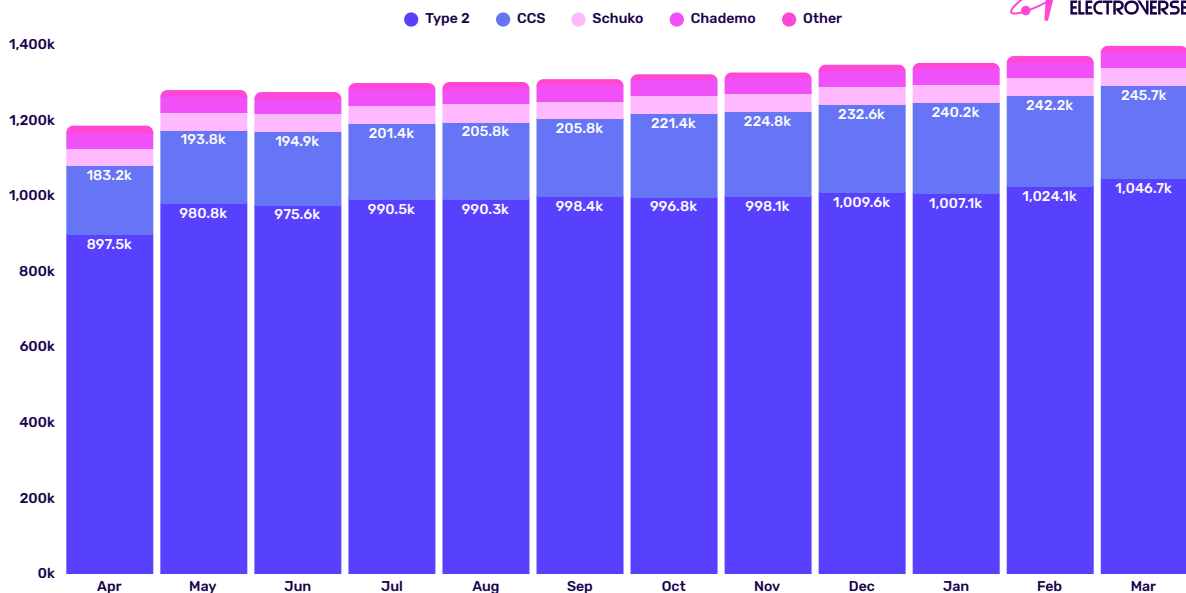
# STANDARD TYPE

EUROPE CONNECTORS BY TYPE



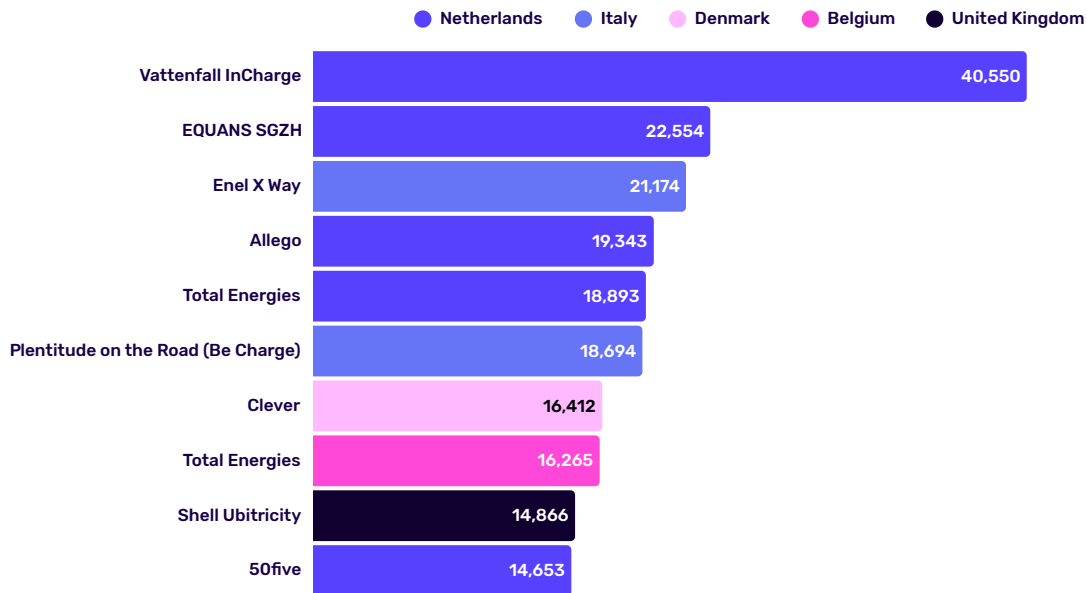
Connector trends across Europe closely mirror those seen in the UK. Market growth is being fuelled by the widespread rollout of Type 2 and CCS connectors, now standard on all new vehicle models. In contrast, CHAdeMO connector numbers have remained steady, continuing to support older vehicles still in 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.

EUROPE CONNECTORS BY TYPE

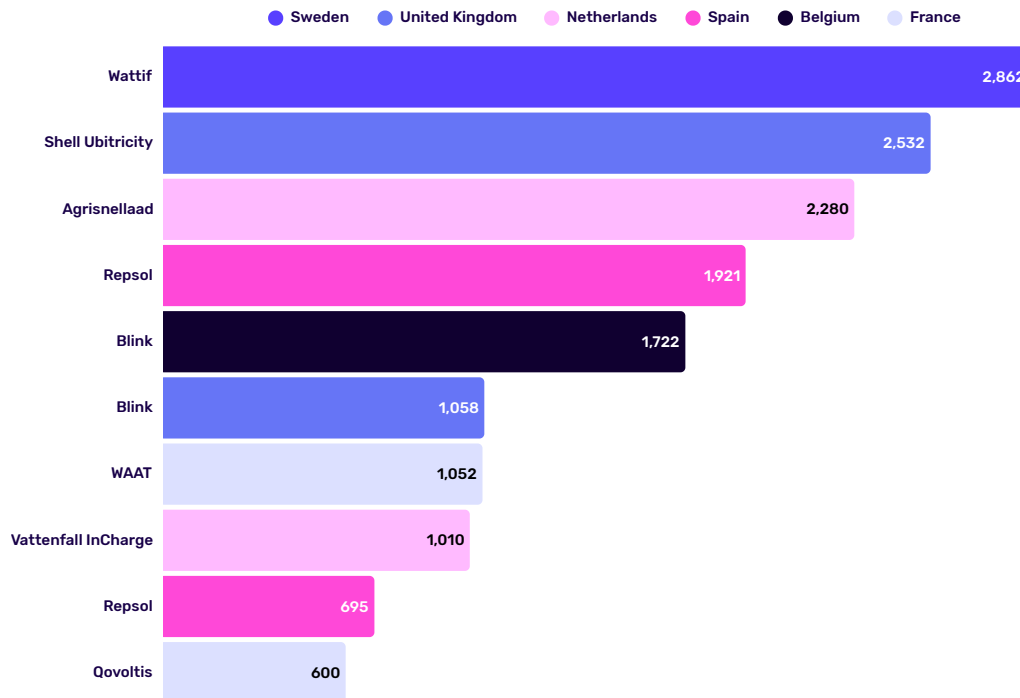


# CHARGE POINT OPERATORS

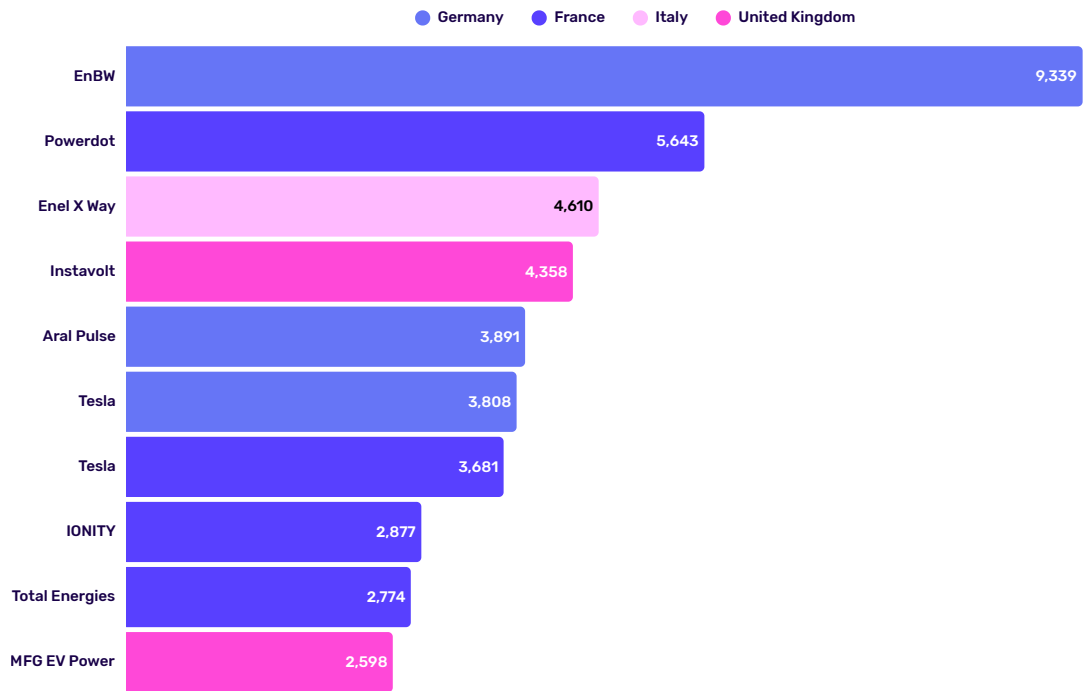
## LARGEST OPERATORS IN EUROPE - CONNECTORS



## LARGEST SLOW/FAST OPERATORS - CONNECTORS



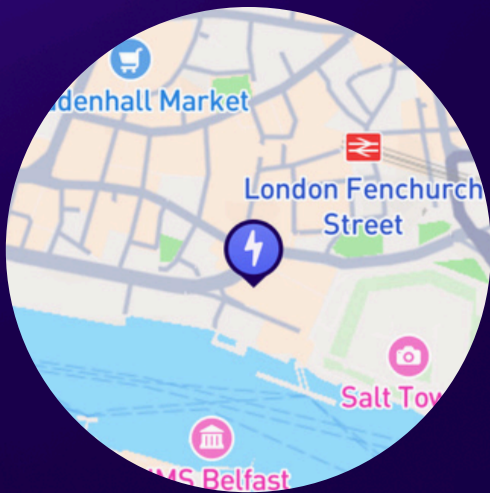
## LARGEST RAPID/ULTRA OPERATORS - CONNECTORS



# DEFINITIONS

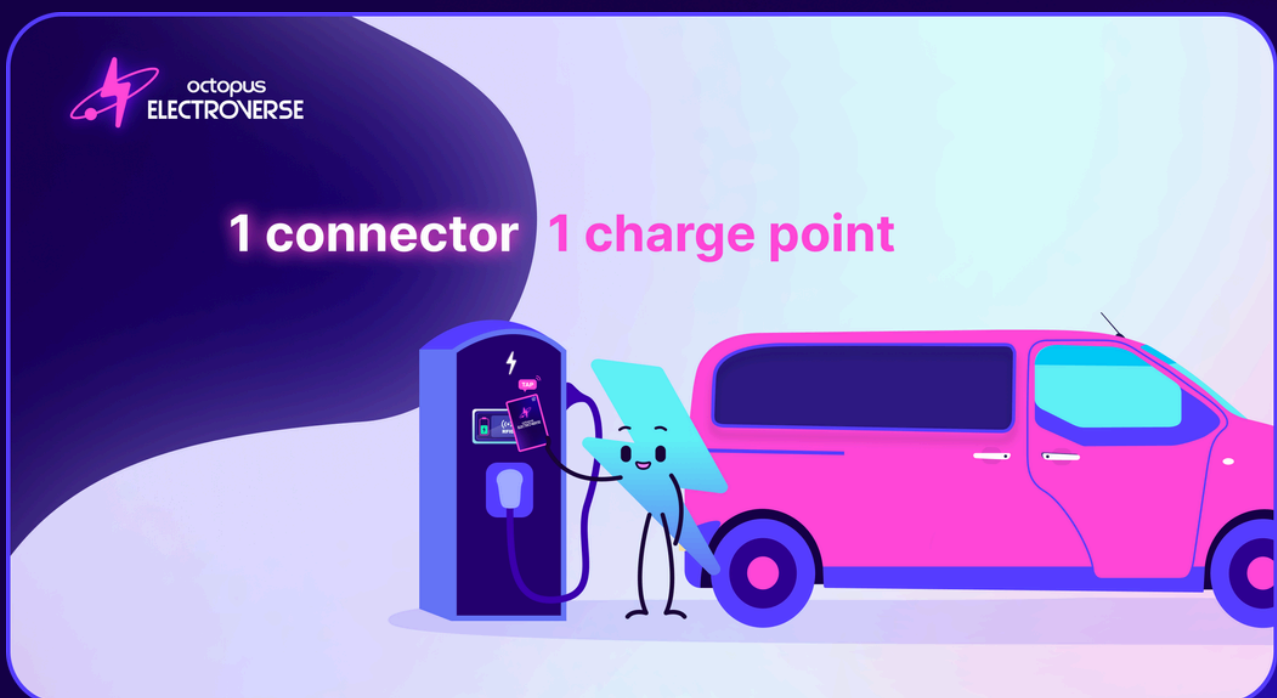
## DEFINING A CHARGE POINT

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:



**2 connectors 1 charge point**



**2 connectors 2 charge points**

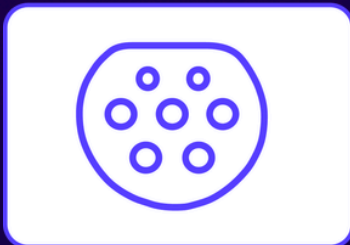


3 connectors 2 charge points



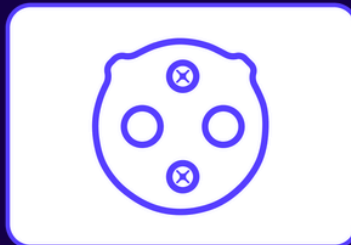
## VISUALS OF CHARGING SOCKET TYPES

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



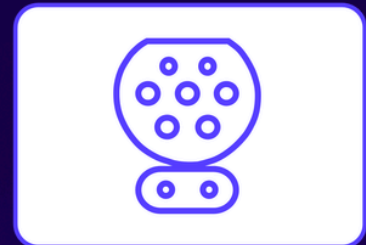
**TYPE 2**

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](#)