EV Infrastructure Growth Slows as Consumers Cite Charging Access as Top Barrier to Adoption across U.S. and Europe

- *HERE-SBD EV Index 2025 reveals already-significant infrastructure gaps grow larger*
- *The U.S. enters early stages of large-scale deployment, but consumer skepticism remains high*
- *New Jersey and New York make strides in annual rankings as East Coast "EV corridor" dominates top five*
- *Average charger power (speed) makes or breaks country performance in Europe while EV adoption rate disparities remain*

Chicago and Berlin — HERE Technologies, the leading mapping and location data company, and SBD Automotive, a global automotive research firm, today released the third annual HERE–SBD EV Index, revealing that EV infrastructure is falling short of rising consumer demand and expectations, despite measured growth across the U.S. and Europe.

The EV Index offers one of the industry's most comprehensive assessments of EV infrastructure maturity, ranking U.S. state (+D.C.) and European country performance across charger per road length, average charge power, electric vehicle fleet share and chargers per EV.

New this year, a consumer survey of more than 2,000 drivers across the U.S., France, Germany, Spain, Italy and the UK was conducted by SBD to better understand how drivers experience daily travel, EV adoption barriers and motivations, and how they perceive and experience charging infrastructure.

Infrastructure Development Expands, but Gaps Persist

The 2025 EV Index shows continued infrastructure growth across both the U.S. and Europe, though growth slowed compared to last year. The U.S. added 37,000 charge points – a 19% increase – driven by rising public and private investment as it enters the early stages of mass deployment. Europe, a more mature market, added 245,000 public charge points – more public chargers than the U.S. has installed in total – representing a 27% increase. However, infrastructure buildout varies widely across European countries, often reflecting differences in GDP per capita.

Despite these gains, access to charging remains the top barrier to EV adoption. Over half (53%) of U.S. survey respondents cited perceived lack of charging access as a primary concern, highlighting the need for continued investment in public infrastructure.

Charging Power Gains Offer Consumers Optimism

Both the U.S. and Europe saw significant improvement in charging power, with 28% and 12% increases in average power per charger respectively. These gains address one of the top consumer concerns, charging time, highlighted by 43% of U.S. survey respondents.

The state of Alabama, and countries including Latvia and Lithuania, made significant progress in their respective average power as they rushed to install fast chargers, potentially leapfrogging legacy systems in more mature regions.

Consumer Sentiment Highlights Gaps in EV Adoption

The accompanying consumer survey, which includes approximately 1,000 drivers in the U.S. and 1,000 drivers across France, Germany, Italy, Spain and the UK, offers regionalized insight on consumer EV sentiment.

- **Current EV drivers are highly satisfied**: Only 7% of respondents in Europe and 5% in the U.S. would not choose electric again.
- **Drivers in the U.S. are the most resistant**: 57% of U.S. respondents are likely to purchase a gasoline-powered car for their next vehicle compared to only 25% in Europe, and only 24% of U.S. respondents believe EVs will make up more than half of new car sales by 2030.
- **Price remains a major factor**: If cost and specs were equivalent for electric and gasoline-powered cars, 80% of UK drivers would choose an EV, compared to just 32% in the U.S.
- **EVs closely linked to sustainability**: 87% of Europeans and 73% of Americans surveyed indicate EVs are important to meeting climate targets.
- **Dealer education is lacking**: An overwhelming majority of respondents in the U.S. (75%) and Germany (66%) reported receiving no education on EVs from the dealer.
- **Certain regions are satisfied with charging access**: At least 70% of respondents in Washington, Maryland, California and the UK agreed charging availability is good. At least 50% in France and Germany have never experienced issues with a faulty charger.

HERE-SBD EV Index 2025 Rankings Snapshot

The Index is based on the following four metrics (each ranked on a scale of 25 for a combined maximum of 100 points):

- **How far you must drive to find a charger:** number of public EV chargers per road length.
- **How quickly you can charge:** the average power capacity of public EV chargers.
- **Number of EVs on the road versus internal combustion engine vehicles:** EV fleet share.
- **Likelihood of finding an unoccupied charger:** the ratio of public chargers to registered EVs.

This year's Index also introduces a balance scorecard as a new layer of analysis, showing consistency across metrics in addition to performance. Regions that are well-balanced across

all metrics are poised for measured growth. Regions with uneven performance across metrics may have challenges meeting evolving driver and infrastructure needs.

United States Rankings Key Takeaways

- **Top 5 states**: Delaware (1), Washington, D.C. (2), New Jersey (3), New York (4), Massachusetts (5).
- **Delaware** and **D.C.** retained top spots as the most mature states but saw slight declines in scores due to decreasing average charge power and charger ratio respectively.
- **New Jersey** and **New York** entered the top five, signaling the rise of an **East Coast EV corridor**. New Jersey benefitted from a massive jump in average charge power, while New York was propelled by its charger ratio.
- **Most improved: Kentucky** jumped from 45th to 28th with increased charging power and charger ratio; **New Mexico** climbed from 34th to 15th with the installation of 300 charge points; **Iowa** moved from 38th to 23th with the installation of 340 charge points.
- **Most balanced: Alaska**, **Pennsylvania** and **North Carolina** showed consistency across metrics.

Europe Rankings Key Takeaways

- **Top 5 countries**: Norway (1), Luxembourg (2), Denmark and Netherlands (3), Belgium (5).
- **Norway** outpaced Denmark for the top spot, driven by impressive fleet share. **Denmark** slipped slightly, unable to keep pace on charger ratio or average charge power.
- **Latvia** and **Lithuania** showed the most improvement, particularly in average charge power, while **Slovenia**, **Bulgaria** and **Switzerland** slid in the rankings with reductions in the same metric.
- **Most balanced**: **Austria, Slovenia** and **France** showed consistency across metrics**.**

Policy and Investment Context

The HERE–SBD EV Index 2025 underscores a pivotal moment for public charging infrastructure. Infrastructure expansion has slowed compared to last year while consumer demand for EVs continues to rise, particularly in the U.S., where the rollout of the NEVI (National Electric Vehicle Infrastructure) program remains in flux. Delays in implementation and varying state-level execution are contributing to uneven access, reinforcing the Index's finding that the perception of public charging availability is the top barrier to adoption among U.S. drivers.

In Europe, national and EU-level policies continue to support electrification, but regional disparities persist. Countries like Norway and Luxembourg lead in charger density and fleet share, while others face challenges in scaling high-power public charging. The Index's new

balance scores reveal where infrastructure consistency is lacking, offering a data-driven foundation for more targeted investment.

“The third edition of the EV Index shows how consumer views and policy decisions continue to shape the global EV and infrastructure landscape. Combining fresh survey insights with regional market data reveals both progress and persistent barriers to adoption,” said Robert Fisher, Electrification and Sustainability Principal at SBD Automotive. “The findings also make clear that current efforts are not sufficient to meet most regional electrification ambitions, underscoring the need for stronger policies and more proactive product strategies. By sharing these insights, we aim to equip decision-makers across the ecosystem with the clarity needed to accelerate progress for consumers, industry and society alike.”

“This year’s EV Index highlights where infrastructure is falling short of consumer expectations and where coordinated action is most needed,” said Chris Handley, Vice President of Product Management at HERE Technologies. “We look forward to working with our partners across the automotive industry, charge point operators and technology providers to deliver the data and location intelligence needed to ensure EV drivers can accurately find public charging stations, understand optimal times to charge and overcome the access barriers identified in our survey.”

The EV Index provides a timely snapshot of the evolving landscape of EV adoption and infrastructure. As governments and industries continue to invest in electrification, the Index serves as a dynamic tool for understanding where progress is being made and where further efforts are needed to ensure a seamless transition to an all-electric future.

The full HERE-SBD EV Index 2025 rankings and report, alongside interactive visuals and maps, can be found at: https://www.here.com/ev-index-2025

Methodology

The HERE-SBD EV Index 2025 measures and compares momentum in EV adoption and infrastructure development across the globe. It uses an innovative methodology for analysis of HERE proprietary EV charge point data and several global government and automotive industry data sources between June 2024 and June 2025. The Index compares all 50 U.S. states and Washington, D.C. and 30 countries in Europe, including Norway, Luxembourg, Denmark, Netherlands, Belgium, Germany, Austria, Sweden, Lithuania, Bulgaria, Latvia, Finland, Slovakia, Switzerland, France, Estonia, Croatia, Italy, Czech Republic, Portugal, United Kingdom, Romania, Greece, Spain, Slovenia, Republic of Ireland, Poland, Hungary, Cyprus and Malta.

To compile the study’s consumer sentiment data, SBD surveyed over 2,000 drivers online across the United States, France, Germany, Italy, Spain and the UK during July and August 2025.

About HERE Technologies
HERE is the global leader in mapping and location technology. For 40 years, we've been powering innovation for the world's most recognizable companies: from launching our first digital map in 1985, to shaping the future of software-defined vehicles today. With the industry's freshest and richest unified map and a portfolio of products, services and solutions that serve the needs of multiple industries, HERE reveals opportunities that drive progress and unlock new possibilities for every moving vehicle. Discover more at here.com.

About SBD Automotive
SBD Automotive is a global leader in automotive and mobility consulting, dedicated to helping organizations navigate the complex, rapidly evolving landscape of transportation technology and innovation. SBD Automotive combines decades of expertise with cutting-edge insights to drive success for its valued clients and achieve Safe, Secure, Sustainable and Seamless mobility outcomes. More information can be found at sbdautomotive.com.