

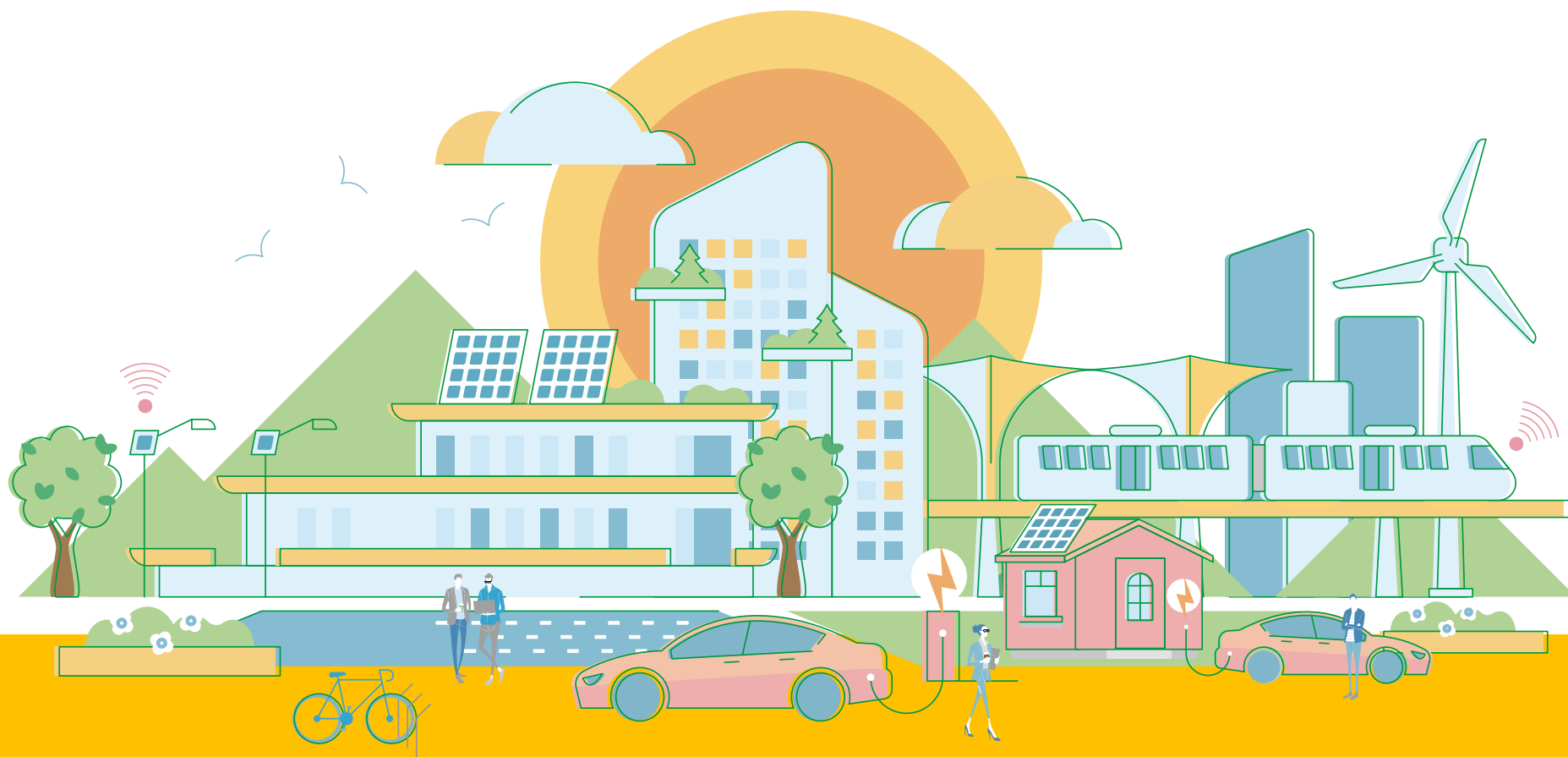


# 欧州活動報告2023 | 活動計画2024

## EU 2023 report | 2024 plan

5 June 2024

チャデモ協議会 欧州事務局 | CHAdemo EU



# | Content

- EV市場と充電器設置 | EV market and EVSE installation
- 欧州EV関連トピックス | EU EV industry topics
- 欧州州事務局の活動 2023-24 | EU activities 2023-24



# 世界EV販売新車の5台に1台へ | Global EVs close to 20 % of new car sale

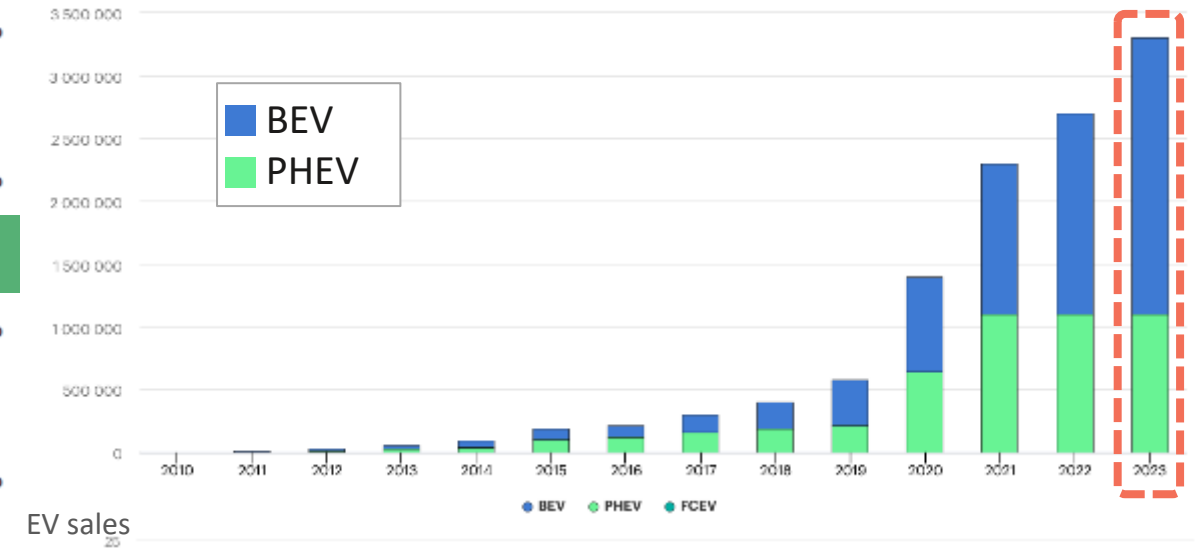
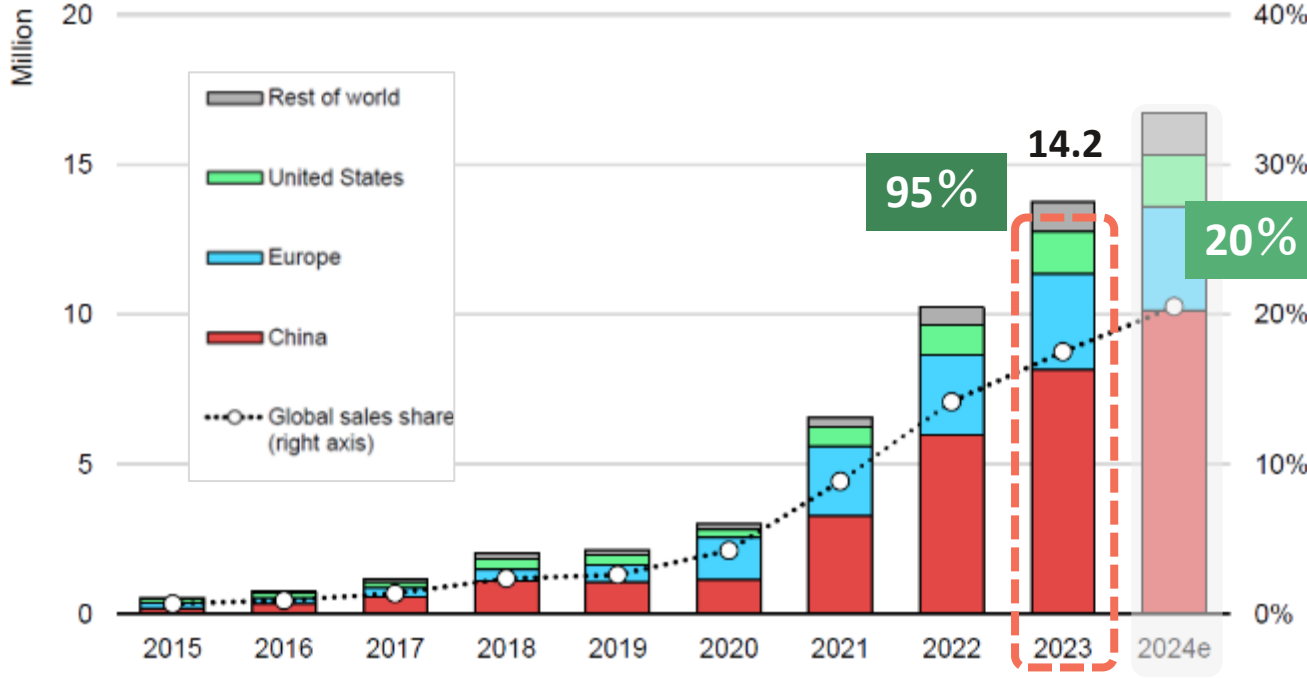


Electric car sales by region and global sales share 2010-2023

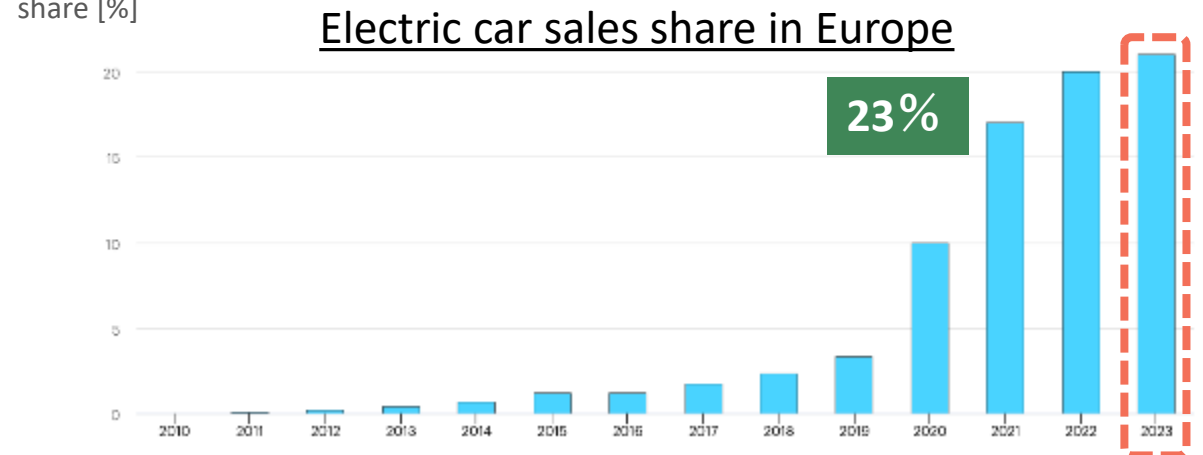
# of EVs sold ['000]

Electric car sales in Europe

300万台/年



Electric car sales share in Europe



- 2023年EV販売**1,420万台** **95%**は中国、欧州、北米の3台市場  
95% of 14.2m global EV sales are in China, Europe and North America
- 欧州のEV販売はBEV増加、PHEV減少も**300万台**乗せ 新車販売の**23%**  
European EV sale surpassed **3 million** in 2023 or **23%** of all new car sale
- 2024年世界の**新車の5台に1台 (20%)** はEVへ  
Global new EV sale predicted to attain **20%** in 2024

Source: Global EV Outlook 2024, Global EV Data Explorer, International Energy Agency [www.iea.org](http://www.iea.org)

Note: EU27, Norway, Iceland, Switzerland and United Kingdom



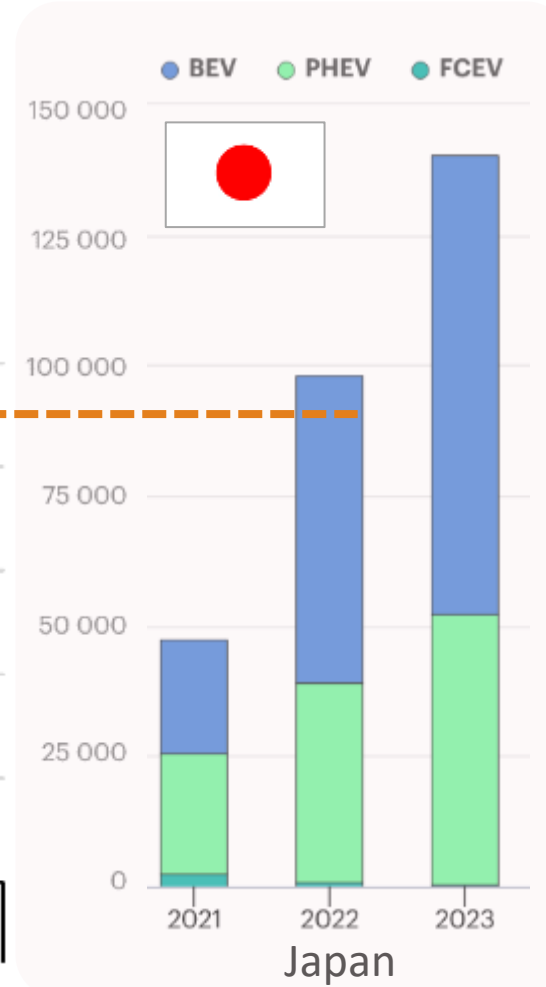
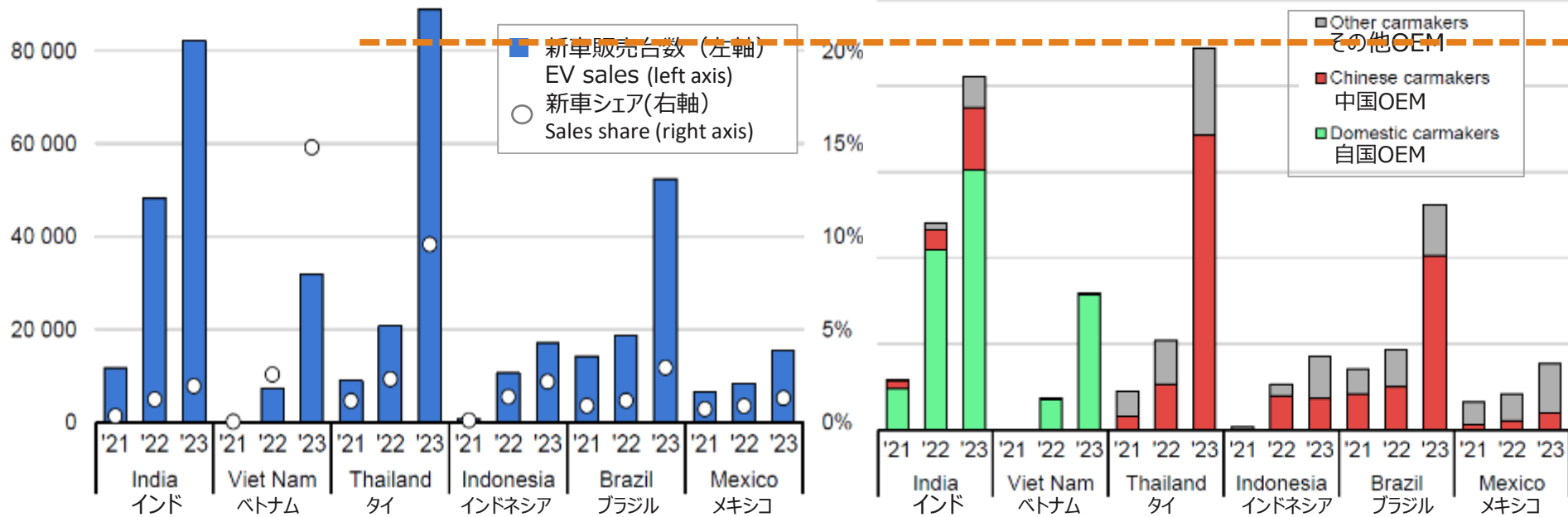
CHAdeMO

# 新興国EV販売は政策誘導で急速に躍進 | Sales in emerging markets growing quickly



## 自動車メーカー本社・国別 電気自動車販売台数と新車販売シェア Electric car sales by carmaker headquarters and country, 2021-2023

Electric car sales:



インドとベトナムでは自国OEM勢が台頭 その他地域では中国OEMが拡大

Local champions are emerging in India and Viet Nam, while Chinese carmakers expand elsewhere

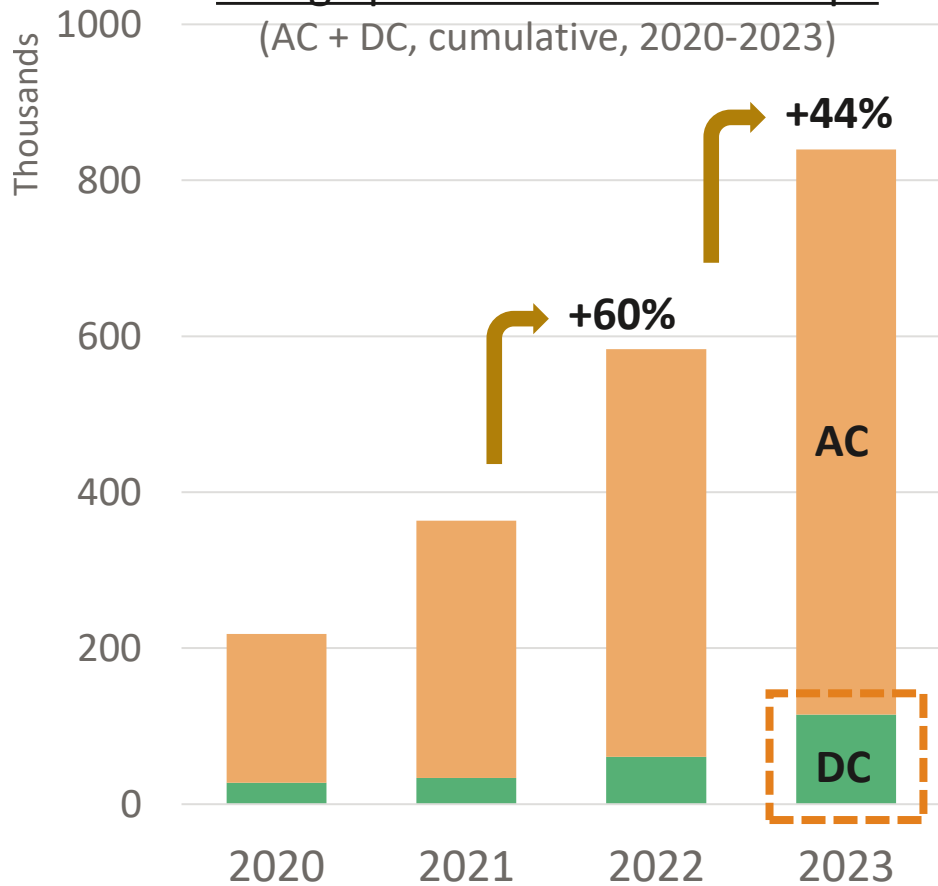
# EU充電器目標は既にほぼ達成

# EU countries already meet '24 charger targets

## 欧州の充電器数推移（累積）

## Charge point evolution in Europe

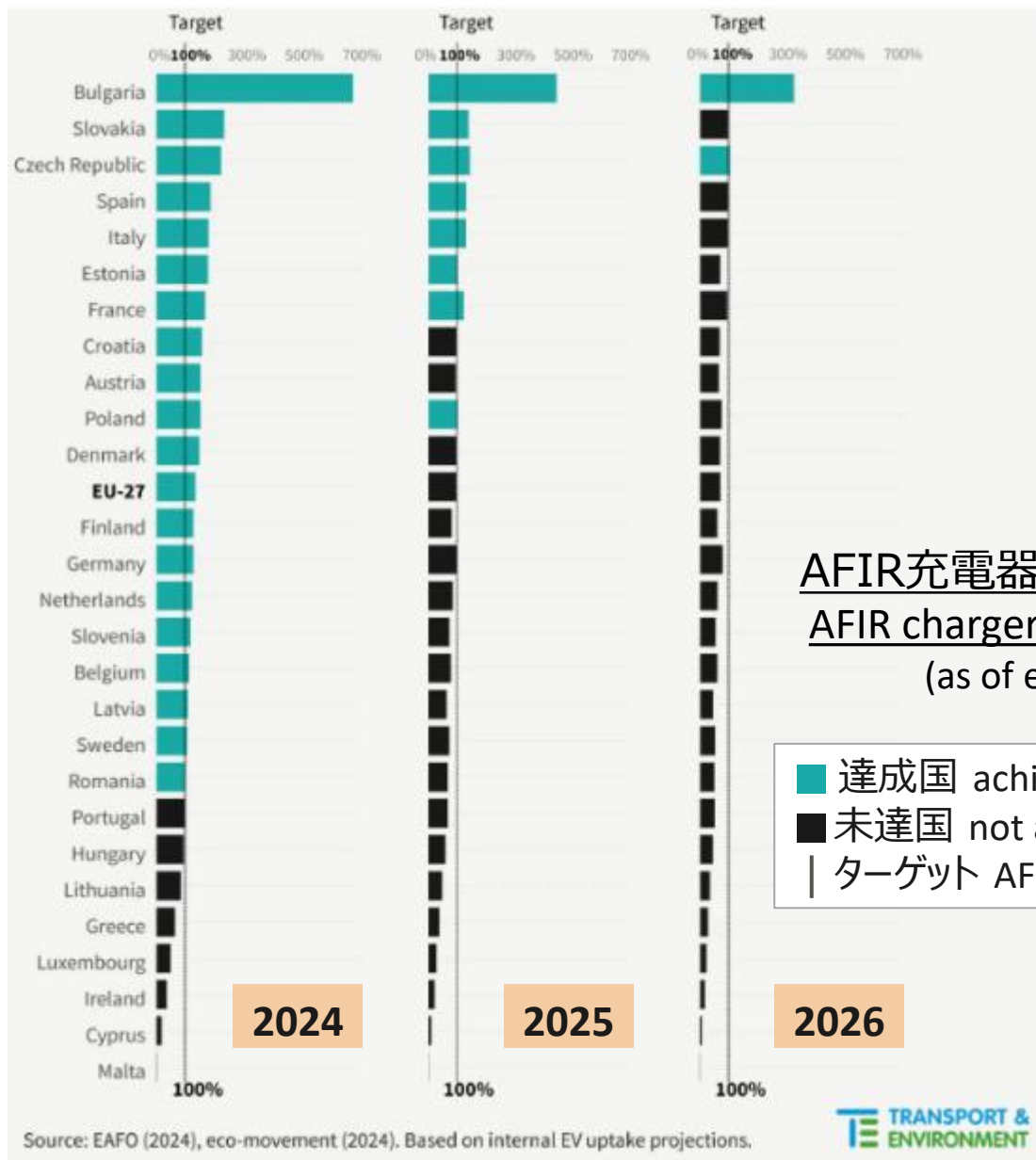
(AC + DC, cumulative, 2020-2023)



Europe: EU27+EFTA+UK; 630k if EU27 only

Source: EAFO (as of 2023) 2020 France data missing;

Transport & Environment



## AFIR充電器目標達成状況

## AFIR charger targets by MS

(as of end 2023)

Source: EAFO (2024), eco-movement (2024). Based on internal EV uptake projections.

# 急速充電器は高速道路から商業施設へ | Fast charger expansion beyond highways

## Case Study: France ランスではLOM法が商業施設への充電器設置を後押し

### 超高速充電器設置状況の推移

#### Maps of French ultra-fast charging location



### 充電器オペレーターによる超高速充電ポイント運営数の分布

#### French ultra-fast charging points repartition per operator



- 高速道路→周辺商業地域へ  
Charger installation expands from highways to retail shops
- 当初の主力プレーヤーに加え、専門プレーヤー、石油&ガスの参入、リテールセクターの参入へ  
Diverse pure players, oil & gas, retail players to invest in fast charging infrastructure
- EU法規制、国内法（LOM）関連補助金に加え、プライベートセクターの動きも活性化（VC, M&A等）  
Legislation (EU/FR), subsidies combined with private sector investments (funds, M&A)

▶ 欧州他地域でも同様の傾向

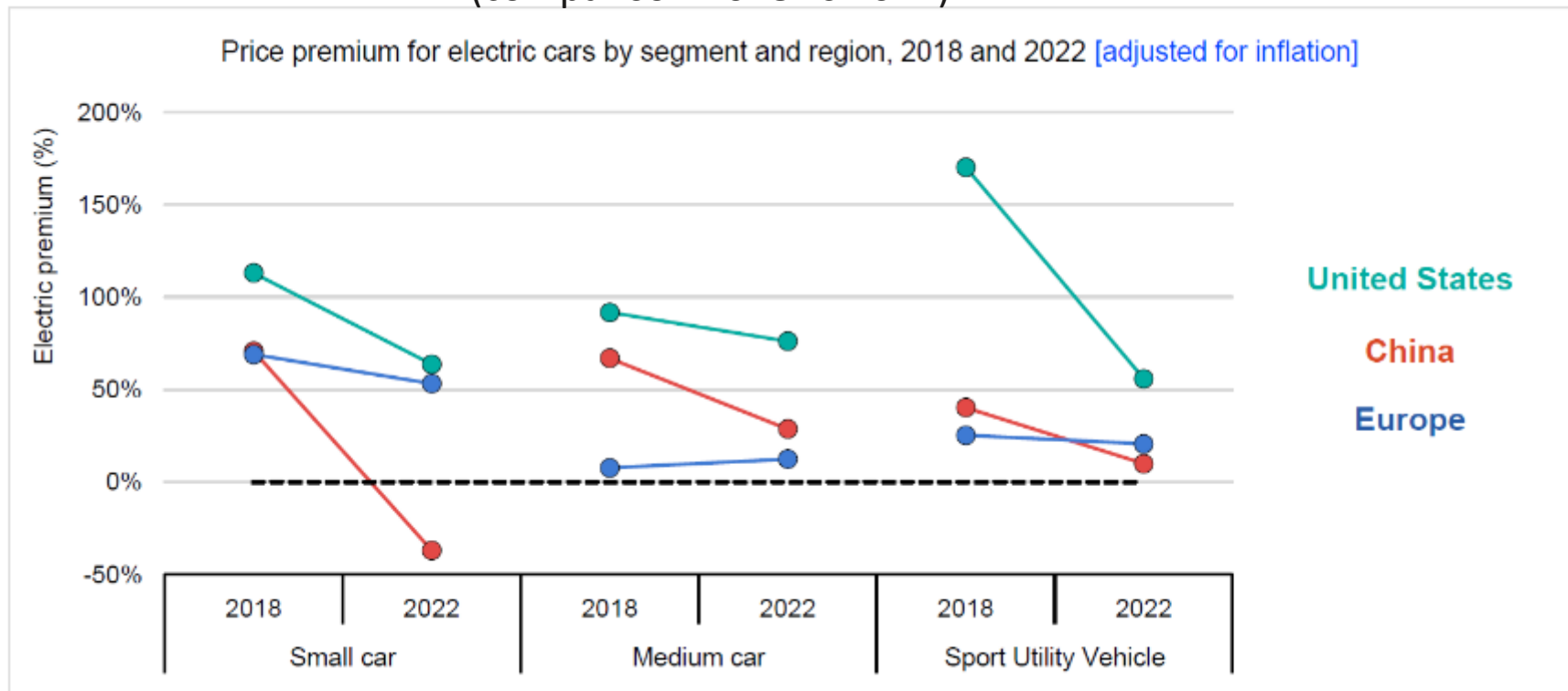
Source: Gireve <https://www.gireve.com/beyond-ev-charging-4/>

Note: 150kW以上の超高速充電ポイント分析 ultra-fast charge points of  $\geq 150$  kW

# EV価格高止まり | EV prices remain high



## BEV価格プレミアム BEV price premium vs ICE by type/region (comparison 2018 vs 2022)



### マクロン大統領の 月100€ リース事業

- 選挙公約の**低所得者層向け「月々100€ リース」**として23年12月に大統領自らビデオメッセージを発表  
Promised/announced by President Macron in December
- 2万5千台の枠に9万1千件応募。当初予想を倍増した**5万台で打ち切り**  
91,000 requests for 25,000 EVs; gov gave 50,000 EVs and suspended project

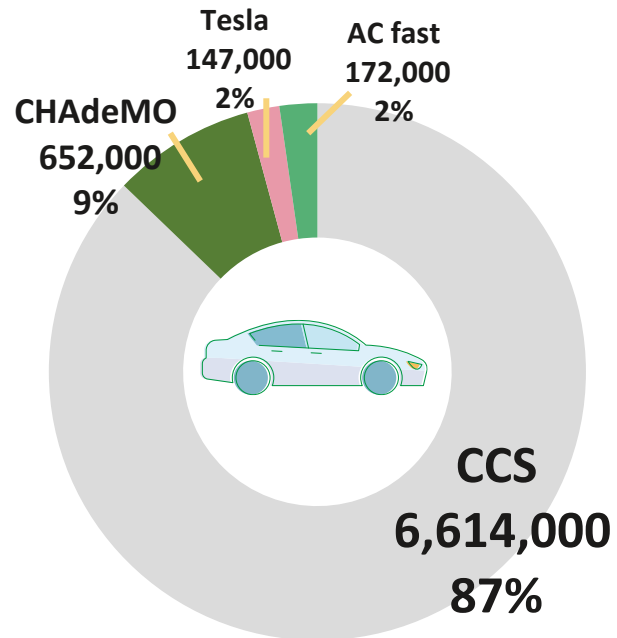


Source: Global EV Outlook 2024, 大統領府プレスリリース (2023/12/14) <https://www.elysee.fr/emmanuel-macron/2023/12/14/voitures-electriques-a-100-euros-par-mois-lannonce-du-president-emmanuel-macron>; La Tribune (2024/2/12) <https://www.latribune.fr/entreprises-finance/industrie/automobile/voiture-electrique-le-leasing-social-victime-de-son-succes-les-constructeurs-appelles-a-acceler-990298.html>

## 急速充電インレットタイプ別EVシェア

### EU EV sales by fast-chargeable port type

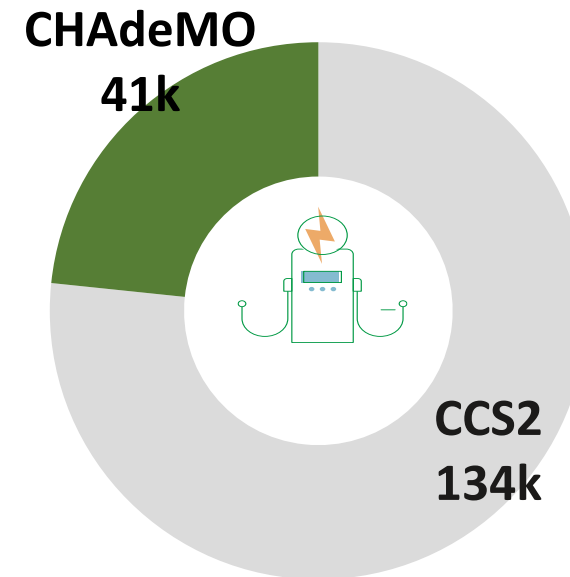
(cumulative, as of end 2023)



## CCS・チャデモ急速充電プラグシェア

### CCS vs CHAdeMO charge points

(cumulative, as of Q1/2024)





# CCS V2G車両発表相次ぐ | “Bi-di EVs using CCS plug already exist”

## VW「初のCCSによるV2H車両」発売発表 (23年12月6日)



- ID (77kWhバッテリー) シリーズ3.5版ソフトウェア搭載車両について、HagerEnergy社の双方向充電器 + HEMSでV2H
  - ISO15118-2ベース
  - 放電の下限は20%
  - 将来的にはV2Gとすべく積極的に市場環境整備を推進

### ■ スウェーデンでのV2H実証も同時発表



12/06/23 Wolfsburg E-mobility Press Release

**Cleverly manage your own electricity:  
First ID. models support bidirectional charging**

## ルノー-CCS AC V2H車両投入 (23年6月13日)

press releases

### Mobilize V2G: where the future electric Renault 5 becomes a source of energy

- The future electric Renault 5 will be Renault's first car to come with a bidirectional on-board charger.
- Thanks to the R5's bi-directional charger, combined with the Mobilize Powerbox bidirectional charging station and the Mobilize V2G service, Renault 5 drivers will save on charging and reduce their overall electricity bill by selling electricity back to the power grid.
- In addition, according to the Mobilize electricity contract, power used to recharge EV batteries will be carbon neutral. Mobilize V2G sees electric vehicles becoming a source of energy for homes and the grid, providing additional flexibility, and making it easier to integrate renewable energies into the energy mix.
- As such, Mobilize V2G service users will actively contribute to the energy transition.

13 June 2023



### ■ ルノー5 (-52kWh)、Mobilize Powerboxの双方向充電器 AC V2H

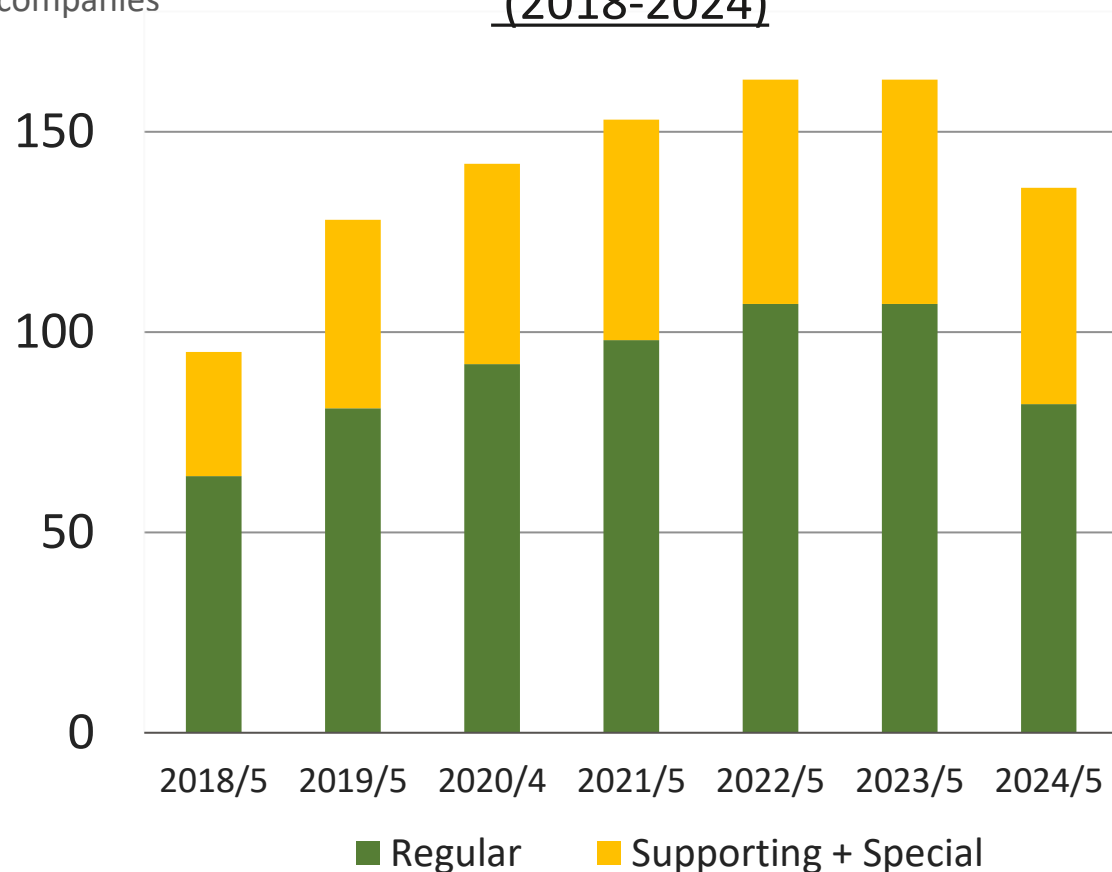
- ISO15118-20ベース
- 7-22kW (11kW OBC)
- The Mobility House とのコラボで2024年はフランス、その後独英へ展開



## チャデモ欧州地区会員数推移

### CHAdeMO EU members (2018-2024)

# of member companies



	May 2023	May 2024	Δ
<b>Regular</b>	107	82	-25
<b>Support</b>	6	4	-2
<b>Special</b>	50	50	+/- 0
<b>TOTAL</b>	<b>163</b>	<b>136</b>	<b>-27(-17%)</b>

- 会員数はCovid前レベルに減少  
Member level back to pre-Covid time
- V2GやEPAC等テーマ別関心  
Thematic interest for new members
- M&Aや倒産による自然減  
M&As and insolvency in the industry
- 会費未払い・連絡先不明会員の一括退会処理  
Batch process to cancel membership of non-paying member to improve the quality of service

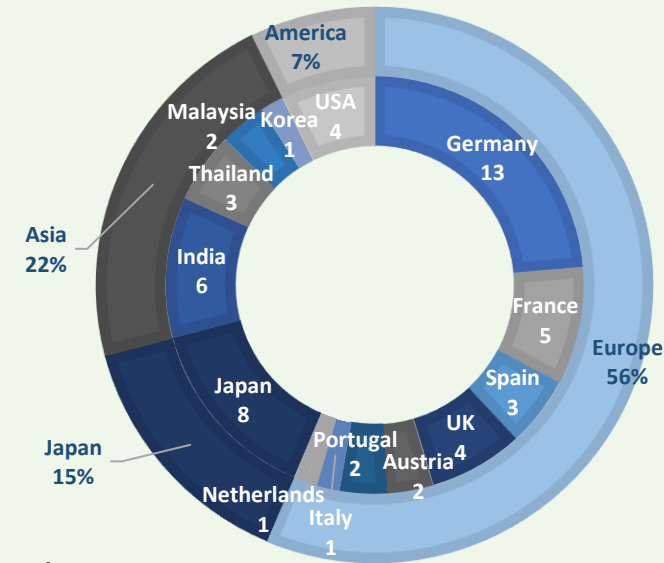
## GTU開催 global technical updates (23/11/27)

### プログラム Programme

- 会長挨拶 (姉川) Welcoome/Anegawa
- STF報告 (Uwe) STF/Uwe Likar
- 技術部会報告 Tech WG reorts
  - ChaoJi、外部給電、大出力 (上島)  
High power charging/Kamishima
  - 新プロトコル (荒井)  
New protocol/arai
  - EPAC (高橋)  
EPAC/Takahashi
- 新会員ピッチ (Pionix)  
New member pitch/Pionix
- 欧州事務局AFIR・EPBD報告 (山辺)  
Secretariat updates/Tomoko

### 結果 Participants

- **参加者はほとんど欧州とアジア・日本**  
**Participants from EU/Asia/Japan**
  - 欧州8か国 (56%)、アジア4か国 (22%)、日本 (15%)、アメリカ (7%) 約60人が参加
- **会員からの評価は良好**  
**Favourable feedback on**
  - タイミング (11月末) timing
  - フォーマット (オンライン) format
  - 長さ (1時間半) 共に概ね好評 duration
  - 頻度は年1回と2回の希望が半々 frequency



## V2Gウェビナー継続開催 V2G webinar series continue

### #9 23/05 Utrecht V2G City (AC)

#### ■ プロジェクト

- IONIQ5を25台カーシェアリングに導入
- 2,530世帯への電力供給を見込む



#### ■ スピーカー

- Robin Berg, We Drive Solar
- Anne Lobbes, Hyundai Motor Nederland



#### ■ 主なポイント

- ユトレヒトはAC充電ネットワークを活用し、世界初のスマート双方向都市を目指す
- すべての公共充電インフラ入札でV2G準拠を義務付け

### #10 24/02 V2X FastHub Project

#### ■ プロジェクト

- 可動式ソーラーV2G設備によるDCマイクログリッド (12基のV2G)
- InnovateUKのV2G事業の展望



#### ■ スピーカー

- Mark Potter, 3ti
- Dr Josey Wardle, Innovate UK



#### ■ 主なポイント

- プレファブ・コンテナ式DCマイクログリッドを使い、経済的なV2Gを目指す
- 英国でのV2Gプログラム第1フェーズ(2018-22)の成果共有と第2フェーズの展望(2022-25)

# PR対象地域の拡大 | Broader regional coverage for PR

## KNM Mobility (Łódź, 23/09/27)

- Largest e-mobility event in CEE
- Active e-mobility market w/ press coverage



- **Panel:** CHAdeMO contributes to smart charging panel with V2G experience



- Limited CHAdeMO charger display



## C-MOVE (Sao Paulo, 23/10/05)

- Largest South American e-mobility event
- **Panel:** Interoperability of charging interfaces
- Discussion amongst CharIN/CHAdeMO/Keysight, agreeing on the importance of safety/interop



- Brazilian e-mobility still low key but buses are a good entry point



## EV Charge Show (Istanbul, 23/11/3)

- 20k visitors from 20 countries
- **Keynote:** CHAdeMO overview and V2G



- Given the earthquakes and natural disasters in the area, V2G received much attention
- ChaoJi for future cargo vehicles were requested



## 会員サービス Member services

- 国際技術報告会  
Global Technical Updates (GTU)
  - Programme TBC
  - Q4/2024?

## 情報収集 Lobbying & monitoring

- EC専門家グループ  
STF membership and monitoring
- 市場&法制モニタリング  
Market & legislative monitoring

- EPACs
  - 標準化Standardisation & mandates; e.g. Battery Regulation, Ecodesign Regulation..
  - ポジションペーパー-Position statements
  - EUROBIKE 出典 (Frankfurt, 2-5 July)

## PR活動 CHAdeMO PR

- V2Gウェビナー V2G Webinar series
  - June: V2G in Australia (date TBD)
  - Sept: French demo projects (date TBD)
  - ....

### スピーカーご希望の方 ご連絡ください

If you wish to speak at a future CHAdeMO webinar, contact us at [info@chademo.eu](mailto:info@chademo.eu)

- ニュースレター Newsletters
- SNS存在感の増強 presence & website
- お問い合わせ対応 General enquiries

## What else?

ご要望をお聞かせください

Any other physical / online events that can be useful to you?

ご清聴ありがとうございました  
Thank you

For more information:

[info@chademo.org](mailto:info@chademo.org) (Tokyo)

[info@chademo.eu](mailto:info@chademo.eu) (Paris)

