

Car charging & AFIR targets: where do we stand?

T&E's EV charging progress report 2026

20 July 2026



Summary: The EU is on track to deliver on public charging targets

The EU's public charging network roll out reached record levels, supported by the implementation of the EU public charging law, AFIR. T&E has been monitoring charging network deployment in its new [EV charging dashboard](#). **Key findings:**

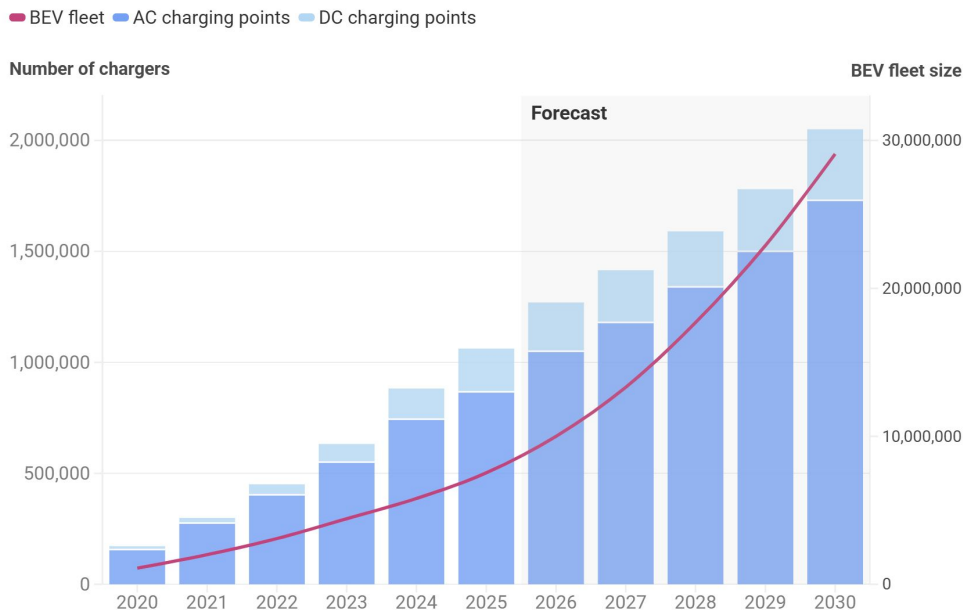
- 01** **EU countries exceed AFIR fleet-based targets.** EU countries have successfully met their AFIR fleet-based targets, exceeding them by over 180% on average for the EU as a whole.
- 02** **EU countries are closing in on AFIR's 2025 distance-based targets.** As of Q1 2026, 79% of the EU TEN-T Core network is compliant with AFIR's distance-based targets. In Western Europe the network is already >99% compliant.
- 03** **Countries initially behind have been rapidly catching up.** While Southern, Central and Eastern Europe still experience some delays, they have some of the fastest growing networks. In under 2 years, Poland tripled its TEN-T Core coverage, going from 20% at the end of 2024 to 59% in June 2026.
- 04** **Remaining gaps can be rapidly closed.** Over 90% of 2025 AFIR distance-based targets can be achieved with 70 strategically placed EV charging pools (22 charging pools in Spain, 11 in Poland and 7 in Romania).

Electric car uptake supported by a growing public charging network

EU charging network is growing hand-in-hand with Battery Electric Vehicle (BEV) fleet penetration.

- **EU public chargers reached 1.1 million in 2025**, 5 times more than in 2020.
- **The EU charging network is set to grow by 90% by 2030** and reach 2.1 million chargers, compared to 2025 (based on ChargeUp Europe forecasts).

The EU charging network is set to grow by 90% by 2030



Sources: EAFO, ChargeUp, GlobalData, T&E forecast • Historic data to mid-2025 from EAFO. Charging points projection from ChargeUp Europe, with fleet size estimates based on GlobalData and T&E's fleet turnover forecast.

AFIR targets: what are they?

The Alternative Fuels Infrastructure Regulation (AFIR) sets the public infrastructure targets, namely:

- **Fleet-based targets**, to ensure national public charging grows in line with electric vehicle uptake.
 - 1.3 kW power output x registered BEV
 - 0.8 kW power output x registered PHEV
- **Distance-based targets**, to ensure minimum public chargers coverage across the EU.
 - TEN-T Core Network (every 60 km)
 - By 2025 → charging pool power (≥ 400 kW) & charging socket power (1 ≥ 150 kW)
 - By 2027 → charging pool power (≥ 600 kW) & charging socket power (2 ≥ 150 kW)
 - TEN-T Comprehensive Network (every 60 km)
 - By 2027 → charging pool power (≥ 300 kW) & charging socket power (1 ≥ 150 kW) on 50% of network
 - By 2030 → charging pool power (≥ 300 kW) & charging socket power (1 ≥ 150 kW)
 - By 2035 → charging pool power (≥ 600 kW) & charging socket power (2 ≥ 150 kW)

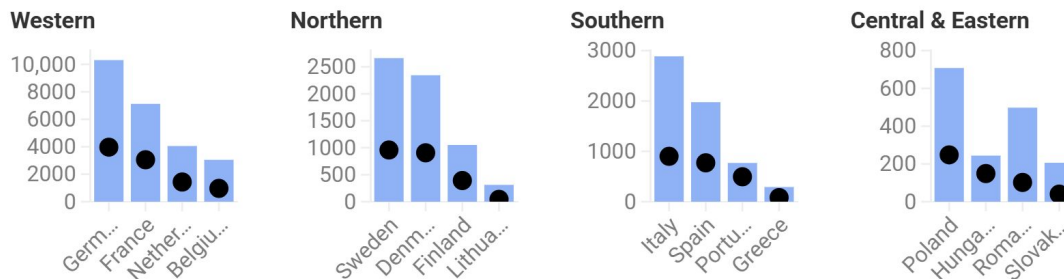
The EU is outperforming AFIR fleet targets

AFIR fleet target ensures public chargers deployment and BEVs uptake grow hand-in-hand.

- AFIR fleet targets is **exceeded by over 180%** for the EU as a whole
- As of Q1 2026, **23 of the 27 EU countries have over twice the charging power** required in AFIR.

The Q1 2026 AFIR target is exceeded in all EU countries except Malta

● Target 2026 Q1 ■ Total charging power (May 2026)



Source: Ecomovement, EAFO, ACEA • Under AFIR, member states must provide 1.3 kW per BEV and 0.8 kW per PHEV. Only the five largest countries per region are shown for illustration.

The EU is close to reaching its AFIR distance targets

79% of the TEN-T Core network meets AFIR's 2025 distance target, covered with ultra-fast charging.

- Most of the Western EU TEN-T Core network **already comply** with AFIR target: **already over 99% coverage**.
- While Central & Eastern countries still have some gaps, they have the **fastest growing networks**: +23% coverage in 2025 alone.

TEN-T Core network in June 2026 (for 2025 target)

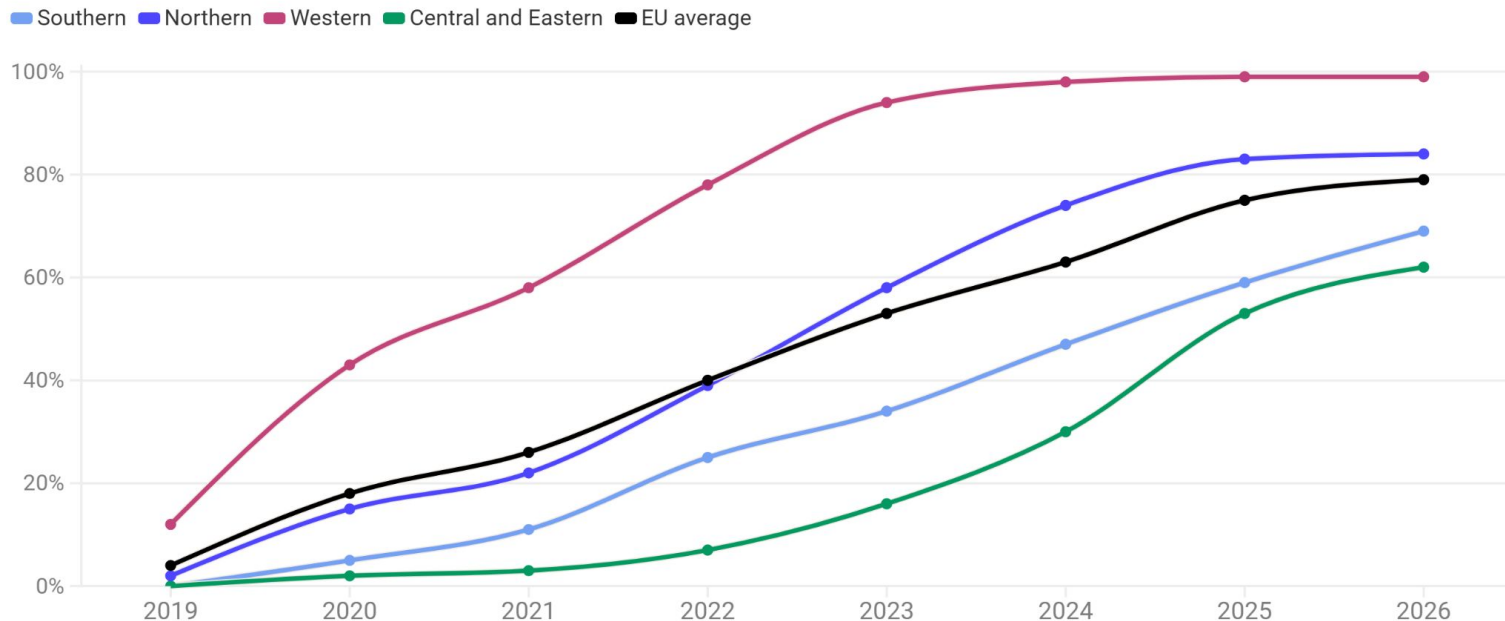
— Compliant with 2025 AFIR target — Not compliant



Source: T&E modelling based on Eco-Movement data

Eastern and Southern regions are rapidly closing the gap

TEN-T Core coverage (2025 targets)



Source: T&E modelling based on Eco-Movement historic data

95% TEN-T Core compliance can be reached with 122 charging pools

To rapidly meet AFIR's distance targets, few strategically placed charging pools are needed.

- **Over 90%** of 2025 AFIR distance targets can be met with **70 well placed EV charging pools**.
 - 22 in Spain, 11 in Poland and 7 in Romania.
 - 69 of these sites already have at least one 50 kW DC charger at the location.
 - 5 out of these already meet AFIR's pool power targets and only need a ≈30k EUR hardware installation.
- **Over 95%** EU coverage can be achieved with **122 charging pools** along the TEN-T network.

122 new charging stations required for 95% TEN-T Core network (2025 target)

— Compliant with 2025 AFIR target — Not compliant ● Upgraded or new charging pool
— upgrade ● new



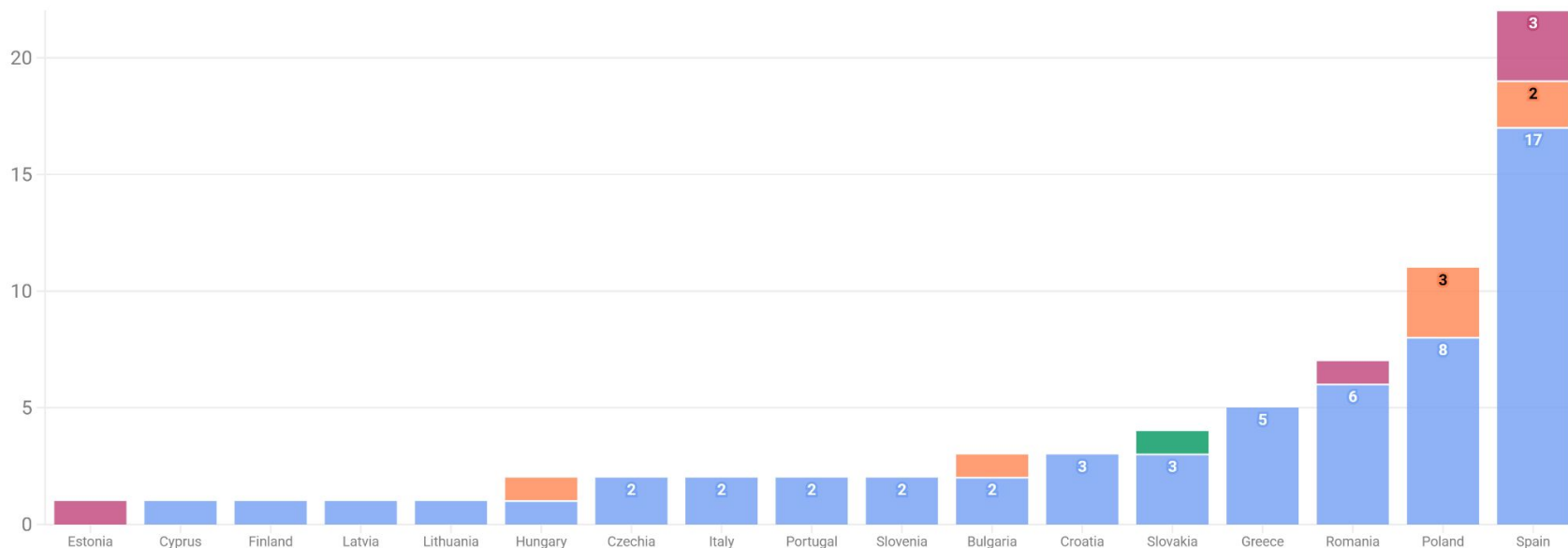
Source: T&E modelling based on Eco-Movement data • Upgrade counts as any existing charging pool with at least one DC charger over 50kW

Few charging pool in Southern and Eastern Europe is sufficient to reach compliance

90% TEN-T Core (2025 target) possible by upgrading 69 charging pools and 1 new build

New or upgraded charging pools to reach 90% coverage

■ Upgrade: pool has at least one 50kW DC charger ■ Upgrade: pool already >300kW ■ Upgrade: pool already >400kW - only needs hardware ■ New build



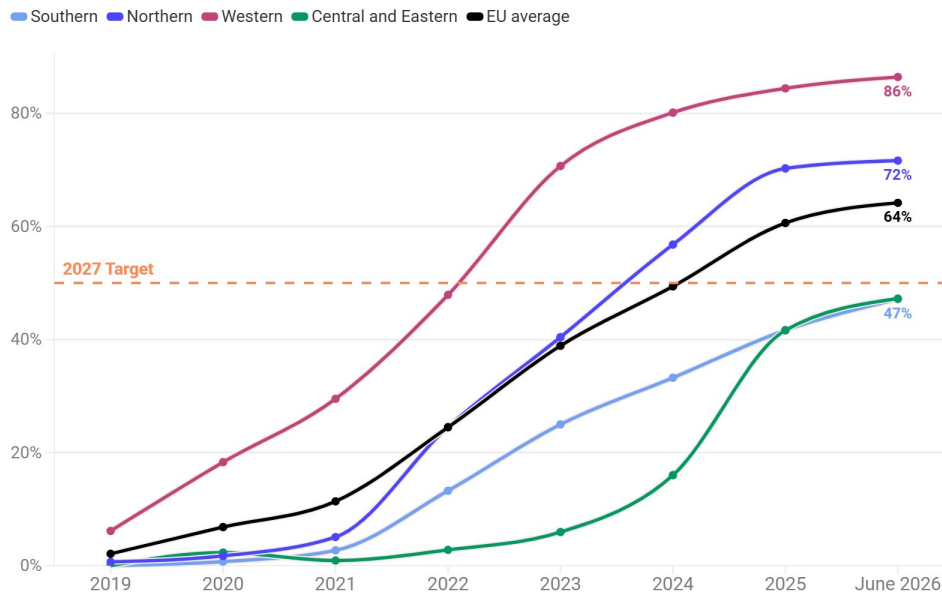
T&E modelling based on Eco-Movement data.

The EU is significantly ahead on its TEN-T Comprehensive targets

EU countries already anticipated charging deployment across the Comprehensive network.

- The EU is already **well ahead to meet the 50% target** required by 2027.
 - **20 EU countries** already achieved their 2027 Comprehensive target.
- **64% of EU's TEN-T Comprehensive network already complies** with its 2030 target.

TEN-T Comprehensive coverage



Source: T&E modelling based on Eco-Movement historic data

EU public charging infrastructure: the road ahead

- 01** **Keep AFIR targets.** AFIR targets helped to significantly accelerate charging network deployment across the EU. The upcoming AFIR review must safeguard the minimum targets and the necessary conditions for the market to further expand.
- 02** **Focus on charging quality.** As the public charging networks grows, AFIR should ensure predictable and seamless user experience by improving price and information transparency and comparability.
- 03** **Closing the few remaining charging gaps.** Governments should focus on closing the remaining gaps on the TEN-T Core and Comprehensive network to ensure EV drivers can travel and charge seamlessly across the EU.
- 04** **Renew the EU public charging fund, the Alternative Fuels Infrastructure Facility (AFIF),** to provide targeted financial support to close remaining gaps along the network.
- 05** **Safeguard car CO₂ standards.** Weakening the car CO₂ ambition would create uncertainty around EV uptake, reducing investment certainty for Charging Point Operators (CPOs) and hinder future charging deployment.

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Annex

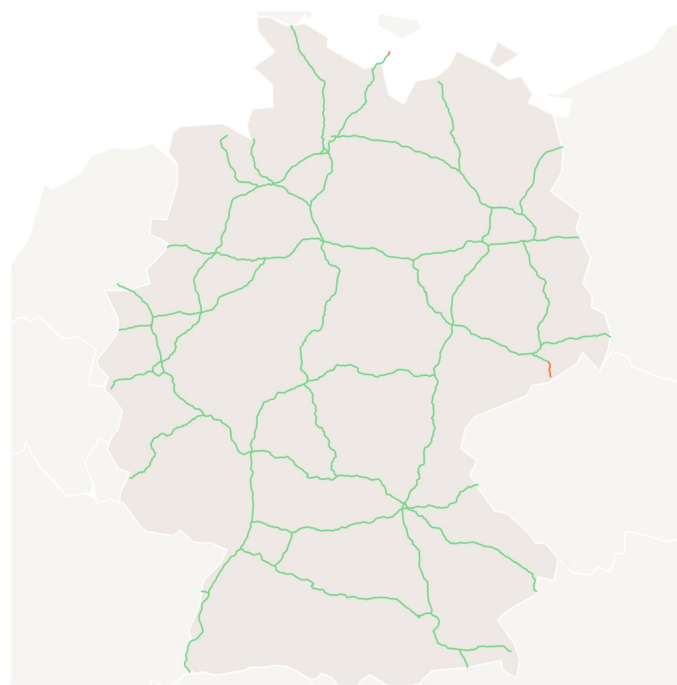


Germany outperforms on every charging target

- Germany **exceeds AFIR fleet power target by over 160%.**
- TEN-T Core network meets **99% of AFIR's 2025 distance targets.**
- TEN-T Comprehensive network **already meets its 2027 targets** and **87% of its 2030 targets.**

June 2026 TEN-T Core network

— Compliant with 2025 AFIR target — Not compliant



T&E modelling based on Eco-Movement data.

Spain meets its power target but needs more charging pools along the TEN-T Core

- Spain **exceeds AFIR fleet power target by over 170%**
- TEN-T Core network meets **63% of AFIR's 2025 distance targets**
- TEN-T Comprehensive network is **close to meeting its 2027 targets** and **already meets 47% of its 2030 targets**.

June 2026 TEN-T Core network

— Compliant with 2025 AFIR target — Not compliant



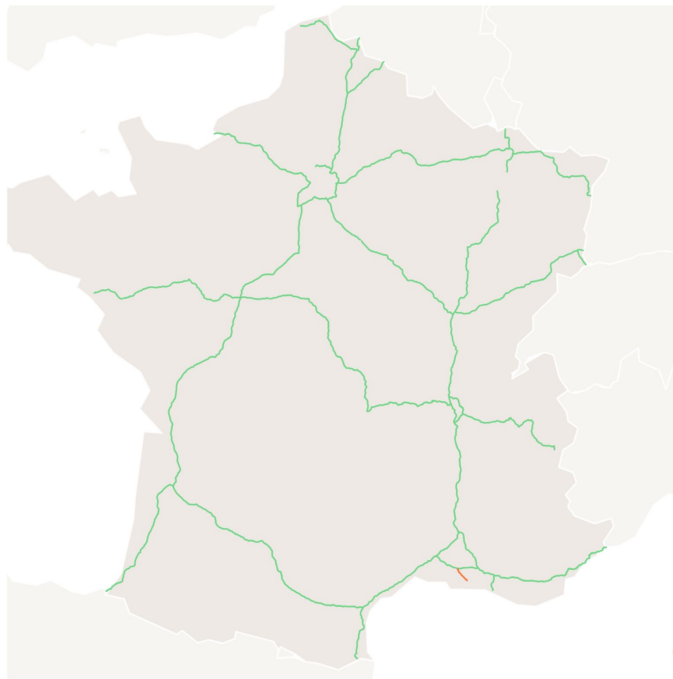
T&E modelling based on Eco-Movement data

France already complies with all its charging targets

- France **exceeds AFIR fleet power target by 140%.**
- TEN-T Core network meets **99% of AFIR's 2025 distance targets.**
- TEN-T Comprehensive network **already meets its 2027 targets** and **87% of its 2030 targets.**

June 2026 TEN-T Core network

— Compliant with 2025 AFIR target — Not compliant



T&E modelling based on Eco-Movement data

Italy well on track to meet its charging targets

- Italy **exceeds AFIR fleet power target by over 240%.**
- TEN-T Core network meets **89% of AFIR's 2025 distance targets.**
- TEN-T Comprehensive network **already meets its 2027 targets** and **58% coverage of its 2030 targets.**

June 2026 TEN-T Core network

— Compliant with 2025 AFIR target — Not compliant



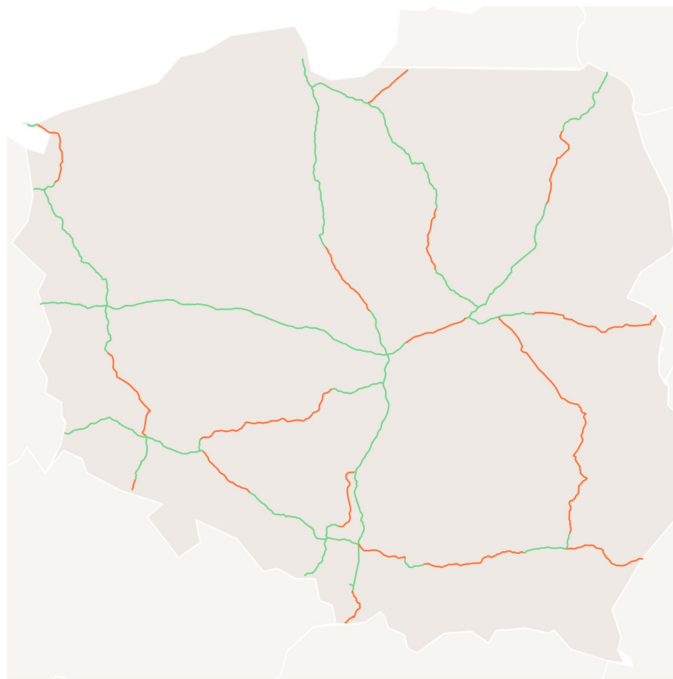
T&E modelling based on Eco-Movement data

Poland meets its power target but needs more charging pools along the TEN-T Core

- Poland **exceeds AFIR fleet power target by over 199%.**
- TEN-T Core network meets **59% of AFIR's 2025 distance targets.**
 - Poland tripled its TEN-T Core coverage in under 2 years, increasing compliance **from 20% to 59%** between end 2024 and June 2026.
- TEN-T Comprehensive network is **on track to meet its 2027 target** and **already meets 36% of its 2030 targets.**

June 2026 TEN-T Core network

— Compliant with 2025 AFIR target — Not compliant

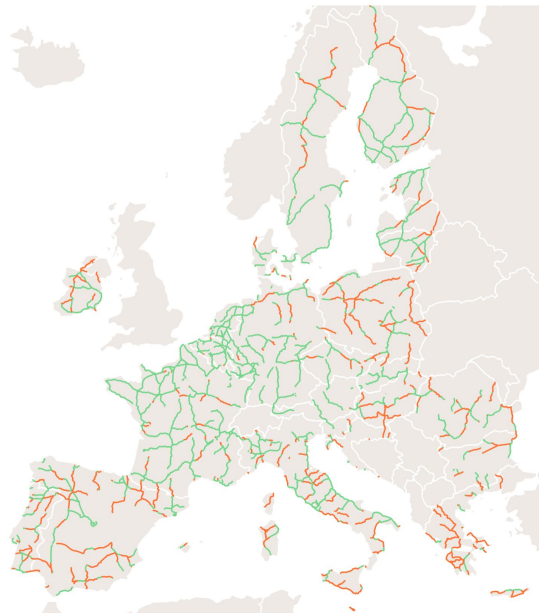


T&E modelling based on Eco-Movement data

EU is significantly ahead on its TEN-T Comprehensive targets

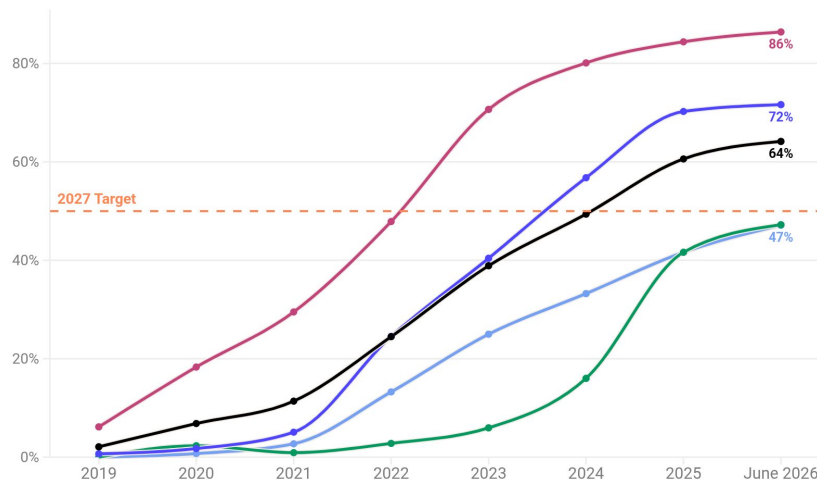
TEN-T Comprehensive network in June 2026 (for 2030 target)

— Compliant with 2025 AFIR target — Not compliant



TEN-T Comprehensive coverage

— Southern — Northern — Western — Central and Eastern — EU average

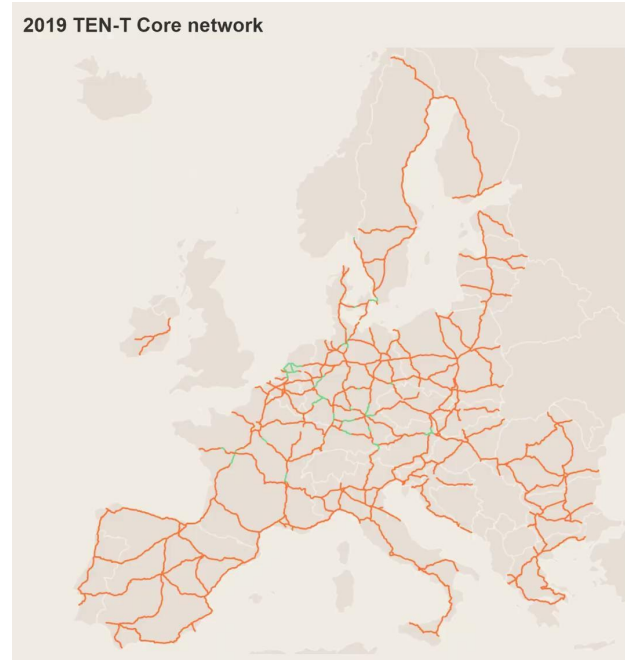


Source: T&E modelling based on Eco-Movement historic data

The EU is close to reaching its AFIR distance targets

In June 2026, 79% of the TEN-T Core network meets AFIR's 2025 distance target, covered with ultra-fast charging.

- Most Western and Northern EU TEN-T Core network **already comply** with AFIR target.
- If Eastern countries still have some gaps, they have the **fastest growing networks**: +23% coverage in 2025 alone.
- Poland tripled its TEN-T Core coverage in under 2 years, increasing compliance **from 20% to 59%** between end 2024 and June 2026.

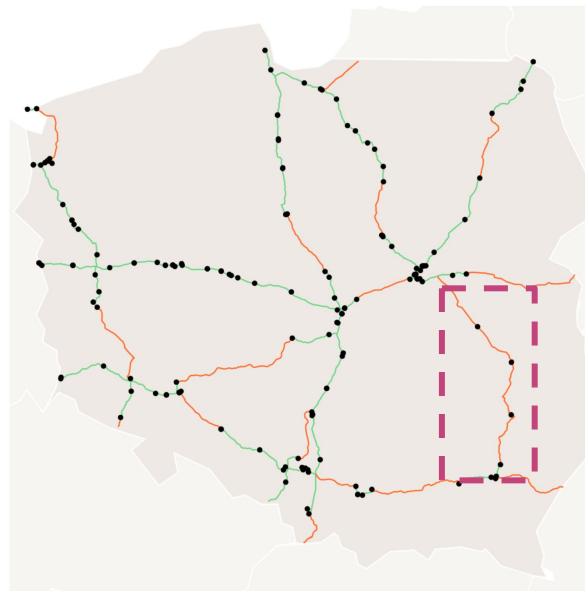


“All or nothing” TEN-T accounting makes charging coverage appear lower than reality

- Under AFIR, if the gap between charging pools is over 60 km, the entire road segment is counted as non-compliant. This means that **even if a road segment is right next to a charging pool it can be counted as non-compliant.**
 - Poland has multiple roads (such as the S19 to E372) where **charging pools are just further apart than 60km.**
 - E10 in Finland has no petrol stations for 77 km, making it very hard to achieve compliance under the current accounting.
- If the accounting were altered to be “30 km in each way from a compliant charging pool”, the **TEN-T Core coverage would increase from 79% to 93%.**

June 2026 TEN-T Core network

— Compliant — Not compliant ● Existing compliant charging pool



T&E modelling based on Eco-Movement data

Methodology

1. Data sources

Eco-Movement charging point EVSE data is used from the end of each year between 2020 to June 2026. TEN-T Core Road shapefile is from the [European Commission TENtec map](#). EuroVoc definition used for EU regions:

- Western Europe: AT, BE, CH, DE, FR, IE, LU, NL
- Northern Europe: DK, EE, FI, LT, LV, SE
- Southern Europe: EL, ES, IT, PT, MT, CY
- Central and Eastern Europe: BG, CZ, HR, HU, PL, RO, SI, SK

2. Analysis & Assumptions

Charging points that are *planned* are excluded from the dataset (classifications based on [Eco-Movement Documentation](#)). Semi-public chargers are included in all outputs under the broad definition of “publicly accessible” under [Regulation \(EU\) 2023/1804](#). A charging point is publicly accessible if the parking area where the charging station is located is accessible to the general public. This includes cases where a CPO may only provide charging to specific EV brands or, for example, if a charger is located in a paid car park.

We break TEN-T Network into 100m segments. We test if each segment is compliant based on whether it is on a road segment with recharging pools no more than 60km apart. We only include charging pools that provide ≥ 400 kW total power output and have at least one recharging point with ≥ 150 kW individual power output. The recharging pools are located on the TEN-T road network or within 3 km driving distance from the nearest exit.

3. Limitations

We assume that each recharging pool can be used in either road direction, there may be a small number of cases where this is not possible.

For some operators, when two EVSEs at a charger are used at the same time only half the power is received by each car. We discount this effect when counting the total pool power because the data is not currently reliable. However, we estimate it could reduce TEN-T Core coverage in June 2026 by around 3-4%.