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Develop or Die:
What should be the strategy of fuel station operators for entering the e-mobility market?

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Introduction:

The development of electric mobility in Ukraine is gaining momentum, creating new opportunities and challenges for fuel station operators (FSOs). 2025 became a historic record-breaking year for the EV segment, setting a benchmark that redefined the market.

According to Opendatabot[1] and market data, the Ukrainian fleet expanded by a staggering 109,309 imported electric vehicles in a single year. This includes 22,800 new EVs (+122.9% year-on-year) and 84,400 used imported EVs (+104.7%). Additionally, the internal domestic resale market surged with 35,800 transactions, a 38% increase compared to 2024.

Consequently, according to the Institute for Automotive Market Research[2], which accounts for all types of registrations and imports, as of the end of 2025, the total fleet of battery electric vehicles (BEVs) in Ukraine reached 246,000 units. According to DataDriven forecasts, by 2030, the number of electric vehicles will increase almost fivefold to 750,000, highlighting the critical need to accelerate the development of a network of sustainable charging infrastructure in Ukraine now.

FSOs such as OKKO, WOG and Ukrnafta are already actively investing in charging stations, integrating them into their forecourts and collaborating with independent operators such as TOKA. This transition is not only an opportunity for diversification but also a necessity to remain competitive as petrol and diesel combustion engine vehicle sales are anticipated to decline following the global trend in favour of electric vehicles.

Section 1. Typology & Eletric Cars Market.

Classification of charging speeds

To ensure clarity and consistency throughout this article, charging infrastructure is categorised by power output as follows:

- Slow AC (<22 kW): Standard alternating current charging, typically used for 'grazing' at homes, workplaces, or overnight destinations where dwell times are long.
- Fast AC (<50 kW): Higher-power AC charging. While some infrastructure supports this, actual charging speeds are often limited by the vehicle's onboard charger capabilities.

[1] OpenDataBot, URL: https://opendatabot.ua/analytics/import-cars-2025
[2] Automotive Market Research Institute, URL: https://eauto.org.ua/en/news/975-electric-vehicle-market-in-ukraine-results-of-2025

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- Rapid DC (50 kW – 100 kW): Direct current charging suitable for quick top-ups in urban environments or retail locations. It is significantly faster than AC but generally slower than modern highway standards.
- Ultra-Fast DC (100 kW – 350 kW+): High-power charging technology essential for motorway hubs and the strategic road network. These chargers are designed to replicate the conventional refueling experience by minimising downtime for long-distance travelers.

Typology of electric vehicles:

According to the Law of Ukraine "On Motor Transport", the following types of vehicles are distinguished, which are powered by electricity or charged from an external source of electricity: plug-in hybrid vehicles, hybrid vehicles, and battery electric vehicles.

Battery electric vehicles (BEVs) are fully electric cars powered exclusively by rechargeable batteries, without an internal combustion engine. Unlike traditional vehicles, BEV drivers typically prefer a 'grazing' approach to charging - topping up their vehicle wherever they park using slow AC (<22 kW) destination chargers at home, work, or retail locations, as this is more cost-effective and convenient.

However, for long-distance travel, BEVs rely on 'on-the-go' charging hubs. While drivers often view these as a "last resort" due to higher costs, they remain a critical infrastructure component for intercity mobility. This dependency drives demand for a reliable network of Rapid DC (50–100 kW) and Ultra-Fast DC (100–350 kW+) chargers. Station owners can capitalise on this by prioritising investment in Ultra-Fast DC hubs along motorways and strategic routes to serve drivers when 'grazing' is not an option and minimising dwell time is crucial.

Plug-in hybrid electric vehicles (PHEVs) combine a small battery powered electric motor with a combustion engine (petrol or diesel), offering drivers the ability to charge the battery via external stations for short-distance, all-electric driving, typically between 20 and 80 kilometres. When the battery runs low or the driving speed increases above a certain level, the PHEV switches to the combustion engine, providing additional range for longer trips. This hybrid functionality makes PHEVs attractive to users who charge on occasion, expanding the market for charging stations. Owners can target PHEV users by installing Slow AC (<22 kW) at destinations such as shopping centres, supermarkets, hotels and workplaces, where charging sessions fit into daily routines. BEV and PHEV drivers typically prefer to 'charge wherever they park', adopting a 'grazing' approach to their charging behaviour, as this implies significantly lower costs and disruption compared to Rapid or Ultra-Fast DC charging hubs.

Hybrid electric vehicles (HEVs) integrate an electric drive train and combustion engine components but cannot be plugged into a power outlet, relying on regenerative braking and the combustion engine to recharge the battery.

As a result, HEVs do not require access to public charging infrastructure. However, this does not make them irrelevant for station owners' planning. Since HEVs still rely on an internal combustion engine, their drivers remain active customers for petrol and diesel. Therefore, operators must carefully

analyse forecasted HEV sales and parc numbers to understand the continued demand for liquid fuels and ensure they maintain adequate refuelling provision for this cohort during the transition period.

The dominance of domestic charging

While public infrastructure is vital, it is crucial to recognise the specific structure of the Ukrainian market: up to 70% of all EV charging in Ukraine is estimated to take place at domestic locations. This overwhelming preference is driven by economic pragmatism: the significant price disparity between regulated household electricity tariffs and commercial public charging rates incentivises drivers to charge overnight whenever possible.

For FSOs, this reality represents a strategic pivot point. Recognizing that they cannot compete with domestic electricity prices, FSOs must position their offering differently. The public charging hub becomes a destination for "opportunity charging" (rapid top-ups during the day) and long-distance transit, rather than a daily necessity. Consequently, the key value proposition for an FSO is not price, but speed and convenience - providing a premium ultra-fast service that justifies the cost when the driver is away from home.

Defining the Scope of Operations

This strategic decision-making process is not as clear-cut as simply choosing between motorways and city centres. Fundamentally, FSOs must repurpose their existing forecourt estates to provide high-quality charging for BEV and, to a lesser extent, PHEV drivers. However, the broader strategic question lies in the extent to which they wish to follow the customer beyond the forecourt.

Operators must decide whether to focus purely on their physical stations or to diversify by providing charging services at destinations, workplaces, and homes. While some owners may prefer a forecourt-only focus, others will recognise the opportunity in 'owning the customer' while they are away from the pump. By expanding their network to include destination charging, offering roaming services, or bundling retail offers and domestic energy supply via digital apps, FSOs can maintain a continuous commercial relationship with the driver throughout their entire day.

Charging typology

Electric vehicle charging in Ukraine is mainly carried out using standardised connectors that are compatible with European and global vehicles. The main types include:

1. **Type 1** (SAE J1772): An alternating current (AC) connector common to older American and Asian electric vehicles, supporting up to 7.4 kW (Level 2 charging). It has five contacts for single-phase power, is slower and is typically used for overnight charging. Common models in Ukraine: Nissan Leaf (models imported from the US market), Chevrolet Bolt EV (early models), Chevrolet Volt, Ford Focus Electric, Mitsubishi i-MiEV.

   While models like the Nissan Leaf still account for approximately 14% of the total active EV parc in Ukraine, their share is being rapidly diluted by the influx of Chinese (GB/T) and

European (Type 2) vehicles. Consequently, Type 1 is considered a legacy standard with diminishing commercial value for FSOs, making strictly new investments in this interface difficult to justify.

2. **Type 2** (Mennekes): Standard alternating current (AC) connector in Europe, including Ukraine, with seven pins, supporting up to 22 kW (three-phase current). It differs from Type 1 in that it provides faster AC charging and greater versatility for use at public stations.
   Common models in Ukraine: Tesla Model 3/Y/S/X (European versions), Volkswagen ID.3/ID.4, Renault ZOE, BMW i3, Audi e-tron, Mercedes-Benz EQC. This connector is used by most electric vehicles officially imported from Europe for AC charging.
3. **CCS** (Combined Charging System): A connector for fast DC charging that combines Type 2 (or Type 1 in some variants) with two additional contacts for high-voltage DC, supporting up to 350 kW of power. It allows both alternating and direct current to be supplied through a single port, making it effective for fast charging (e.g., 80% in 30 minutes). Its difference from purely alternating current types lies in the speed and power of energy supply.
   Common models in Ukraine: CCS Combo 2 (dominant in Ukraine): Hyundai Kona Electric, Kia EV6/Niro EV, Audi e-tron, Porsche Taycan, Volkswagen ID.4, Tesla Model 3/Y (with an adapter or built-in in newer versions). CCS Combo 1 (for cars from the US market): Chevrolet Bolt EV, Ford Mustang Mach-E (models from the American market)
4. **CHAdeMO**: A direct current (DC) connector from Japan that supports up to 62.5 kW (upgraded to 400 kW in newer versions) and has a round plug shape for bidirectional charging. It differs from CCS in its protocol and is gradually being phased out in Europe, but is still available for compatible vehicles such as the Nissan Leaf. Common models in Ukraine: Nissan Leaf (models imported from the US and Japanese markets), Mitsubishi Outlander PHEV (for fast DC charging).
5. **GBT AC**: A connector for slow/alternating current (AC), which is standard for all electric vehicles manufactured in China. It looks similar to the European Type 2, but has a different pin layout and communication protocol, making it incompatible without an adapter. This connector supports up to 7.4 kW with a maximum voltage of 230V. Common models in Ukraine: Volkswagen ID.4/ID.6 (Chinese versions), BYD Yuan/Song/Han, Honda X-NV, Nissan Sylphy.
6. **GBT DC:** A connector for direct current (DC) fast charging, designed exclusively for fast charging of Chinese-made electric vehicles. It has a separate port on the car (different from GBT AC), which allows high power (up to 280-300 kW) direct current to be supplied directly to the battery. Unlike CCS, which combines AC and DC pins in a single port (Combo), cars with the GB/T standard have two separate ports for AC and DC charging.

So, the main differences are in the technical characteristics of the connectors and their power: the type of current (alternating (AC) for slow/home charging (for places with a constant and uninterrupted power supply) versus direct (DC) for fast/public charging), charging speed (AC: 3–22 kW, hours for a full charge; DC: 50–350 kW, minutes) and regional standards (Type 1/CHAdeMO for Asia/USA; Type 2/CCS for Europe).

In Ukraine, networks are trying to support all these standards to ensure compatibility, but CCS is becoming more dominant for fast charging due to its alignment with EU standards.

Electric car market

The electric car market in Ukraine[3] is highly heterogeneous: while imports reached a record 37,953 units in 2023, with Tesla (with CCS-compatible models) and Nissan Leaf (often with CHAdeMO) dominating the used car segment, in 2024, the total volume grew to over 62,000 units, with an emphasis on new Chinese models[4] (Volkswagen ID.4/ID.6 manufactured in China, Dong Feng X-NV), which account for up to 85% of new registrations and require GB/T AC/DC for efficient charging.

This diversification of import sources - from American Tesla (4,742 units in the first 5 months of 2024) to Chinese brands (2,573 used cars from China in the same period) - increases the need for hybrid charging stations capable of serving both European and Asian protocols, with a 70% share of CCS in new networks to optimise speed (up to 350 kW) and compatibility with EU standards. As a result, charging infrastructure operators face the challenge of balancing investments: CCS priority for intercity routes and BEV models, complemented by GB/T for the growth of the Chinese segment, which is projected to reach 15-20% of the market by 2025, stimulating the transition to multi-standard hubs to maximise throughput and profitability.

Importantly, the years of rapid market expansion were largely underpinned by VAT incentives: starting in late 2017, imports of electric vehicles were exempt from value-added tax, which significantly reduced their purchase cost. Hower, starting from January 1, 2026, Ukraine reinstated a 20% VAT on electric vehicle imports, marking the the "zero customs clearance" era. This decision followed prolonged discussions between the government and market stakeholders: official car importers argued that the exemptions created uncompetitive conditions, fueling a mass influx of "grey" imports of Chinese EVs (such as the VW ID.4 Crozz and BYD). These vehicles were often imported without official warranties or service support, leading to price dumping.

Anticipation of the new tax regime triggered a "December rally": over 30,000 vehicles were imported in the final month of 2025 alone, as buyers rushed to beat the price increase. Consequently, imports predictably plummeted in January 2026 (dropping 14-fold compared to December) as the market entered a phase of stabilisation and adaptation to the new price levels (+20%). For charging infrastructure operators, this implies that while the growth rate of new customers will slow during the first half of 2026, the market itself is set to become more predictable.

Section 2. Overview of the electric charging station market.

[3] Forbes, URL: https://forbes.ua/news/v-ukrainu-vvezli-rekordnu-kilkist-elektromobiliv-yaki-marki-naypopulyarnishi-21062024-21907

[4] In the second half of 2024, the Chinese automobile market experienced a structural shift toward electromobility: the share of electric vehicle sales surpassed 50%. According to the International Energy Agency's review, the key driver of this transition was the growing economic attractiveness of EVs, driven by a decline in their production costs. For several years, more than half of the EVs sold in China have been priced lower than internal combustion engine vehicles of comparable class. Given the continuing downward trend in battery technology costs, this dynamic is expected to persist and strengthen in the medium term.

In October 2025, the Ministry of Energy of Ukraine published an interactive map of charging stations. The map not only details the location of charging points but also classifies infrastructure by total site grid capacity (up to 100 kW, 100–500 kW, 500–1000 kW, and over 1000 kW hubs).

The charging infrastructure market is demonstrating significant growth rates: as of early 2026, the total number of charging points[5] in Ukraine reached 9,729 units, nearly doubling the figures from the previous period.

A key indicator is the qualitative structure of the network: **62% of the infrastructure consists of AC stations, while 38% are fast DC stations**. This high share of DC ports is a unique feature of the Ukrainian market, driven by the activity of private operators (notably ECOFACTOR, EVA Chargers, and TOKA) developing networks without significant government subsidies. For FSOs, this is a clear signal: while domestic charging remains foundational, the public charging segment has matured, creating sustained demand specifically for high-speed hubs capable of competing on service speed.

Market structure and key players

The market is characterised by dynamic growth and a focus on hybrid business models. The main types of operators include pure players (independent companies focused exclusively on e-mobility like TOKA and ECOFACTOR), FSOs diversifying their business (OKKO, WOG, Ukrnafta), and Energy Companies (e.g., YASNO) integrating charging with electricity supply.

As of early 2026, the landscape is dominated by independent pure players, with data indicating a clear oligopoly where four key CPOs control nearly 94% of the total CPO market (excluding in-house / FSOs chargers):

- **ECOFACTOR** is the market leader by volume, operating 2,936 charging points (30.2% market share). Their network is focused on destination charging (69% AC / 31% DC) with an average power output of 40 kW.
- **EVA Chargers** holds the second position with 2,719 points (27.9% market share) and a similar infrastructure profile (64% AC / 36% DC).
- **TOKA** ranks third with 2,066 points (21.2% market share), demonstrating a stronger shift towards fast charging (42% DC) with a higher average power output of 59 kW.
- **GO TO-U** (1,456 points, 15% share) differentiates itself through a premium "quality over quantity" approach, boasting the highest proportion of fast chargers (52% DC) and the highest average power output (78 kW).

While Independent CPOs and FSOs share common goals - differentiating themselves through digital app interfaces and on-site retail propositions - their core strategic focus differs regarding real estate. **Independent CPOs** are currently prioritizing a 'land-grab' strategy to acquire prime locations for new hubs. In contrast, **FSOs** are focused on future-proofing their existing forecourt estates, leveraging

[5] Electric Drives, URL: https://electricdrives.tv/ev-charging-in-ukraine-the-growth-drivers-leaders/

established locations to diversify their offering. Meanwhile, energy utilities are largely focused on enabling domestic EV charging, viewing EV adoption as a driver for significant increases in household energy consumption and billing.

TOKA operates a hybrid business model that combines the role of a Charge Point Operator with that of a hardware supplier. Unlike pure-play operators, a significant portion of TOKA's revenue is derived from the sale and installation of charging hardware to third-party hosts (shopping centres, hotels, and private investors). These partners own the assets but onboard them onto the TOKA software network, paying a commission on revenue generated (typically around 15%).

Regarding the user proposition, TOKA operates primarily on a Pay-As-You-Go (PAYG) kWh tariff model, without a mandatory subscription fee for access. However, they drive customer retention through deep integration with loyalty schemes (such as the Fishka coalition programme), allowing users to earn and burn points. The network is open to non-members via guest access, though the mobile application remains the primary interface for billing and session management. Additional revenue is generated through advertising on station displays and B2B turnkey installation services.

YASNO E-mobility (part of the DTEK Group) operates a vertically integrated "ecosystem" model that extends beyond simple electricity sales. Unlike pure-play CPOs, YASNO leverages its energy utility background to offer a value proposition focused on convenience, safety, and pricing:

- By treating EV charging as a lifestyle service rather than a utility, YASNO disrupts the market with highly competitive tariffs starting at 7 UAH/kWh, and a special night tariff of 5 UAH/kWh for subscribers. They also offer corporate packages (up to 500 kWh fixed), claiming to save users up to 30% on travel costs.
- **The strategy focuses heavily on digital retention:**
    - App Features: real-time station availability, navigation, and charging time prediction.
    - Gamification: a unique "Eco-bonus" system where users earn trees for every 1000 km driven, alongside practical bonuses for coffee and car washes.
    - Safety: YASNO differentiates itself with a "safety-first" promise, featuring 24/7 video surveillance, illuminated sites, and BMS systems that ensure a 99% session success rate (backed by session insurance against failures).
- To scale coverage without solely relying on proprietary land, YASNO actively partners with premium fuel retailers like SOCAR. These locations offer high-speed charging combined with established amenities (parking, service, food), creating a seamless "stop-and-charge" experience that integrates into the driver's daily routine.

The market is seeing growth in the number of **ultra-fast charging stations**. Ultra-fast chargers (150 kW and above) allow you to recharge 80% of your battery in 20-30 minutes, which is critical for planning your route when travelling. For example, the OKKO petrol station chain has installed 24 new advanced charging stations for electric vehicles in addition to the 60 stations already installed on

key logistics routes between Kyiv and Odesa, Kyiv and Lviv and Chop, Boryspil and Dnipro and Zaporizhzhia, and in large cities.

Business models of key FSOs

Major Ukrainian FSOs have adopted two distinct strategic approaches to entering the e-mobility market:

1. **The Owner-operator model** (e.g., OKKO, WOG) treat EV charging as a core competitive advantage, investing directly in their own ultra-fast charging networks.

- OKKO (approx. 60 ultra-fast hubs) and WOG (approx. 50 stations) focus on installing high-power hubs (120–150 kW) along key transit routes like Kyiv–Lviv and Kyiv–Odesa.
- Monetisation: their primary goal is not just selling electricity but driving footfall to their high-margin retail and food courts during the 20-40 minute charging dwell time.
- Integration: both operators incentivise usage through deep integration with their loyalty apps (Fishka for OKKO, PRIDE for WOG). This allows for seamless payment and the accumulation of points, effectively treating EV drivers like traditional fuel customers.

2. **The Partnership Model** (e.g., Ukrnafta, BRSM) opt for strategic alliances with established CPOs to minimise CAPEX and accelerate market entry, other players.

- Ukrnafta recently partnered with TOKA to co-launch stations (e.g., 120 kW hubs), leveraging TOKA's technical expertise while providing the location.
- BRSM employs a similar hybrid strategy, hosting independent operators on their forecourts.
- Strategy: this "hosting" framework allows them to offer EV services to corporate fleets and transit customers without bearing the full operational risk of developing proprietary software or hardware networks from scratch.

Section 3. Recommendations for FSOs.

1. Compared to other market players, FSOs can leverage several synergies to transition to e-mobility

Compared to other market players, Fuel Station Operators (FSOs) are uniquely positioned to transition to e-mobility by leveraging their existing assets. Unlike new entrants who must scout for locations, FSOs already own strategically positioned sites with developed infrastructure and possess deep data on local traffic counts. This allows them to model investment cases with much higher confidence regarding utilisation levels. Beyond the consumer market, FSOs can capitalise on their established B2B relationships with corporate vehicle fleet operators. As taxi services, logistics companies, and delivery fleets electrify, FSOs are perfectly placed to secure exclusive charging contracts, thereby guaranteeing baseload demand and mitigating the utilisation risk that often plagues independent operators.

This transition also opens up a new "revenue stacking" opportunity by monetising the captive audience. Unlike a fleeting three-minute petrol stop, a 20-30 minute EV charging session creates a dedicated window where the driver is stationary and attentive. This extended dwell time transforms the charging point into a valuable media asset. Operators can install digital screens on charging units for Digital Out-of-Home advertising and use mobile app notifications to drive immediate cross-selling of high-margin internal products. Effectively, the charging station becomes not just an energy dispenser, but a profitable advertising billboard that funnels customers into the retail ecosystem.

Barriers to deployment

However, retrofitting existing forecourts is fraught with significant technical and bureaucratic challenges. The primary hurdle is Grid Connection Capacity. Legacy petrol stations typically operate with a grid capacity of only 30–50 kW, which is sufficient for pumps and retail operations but inadequate for ultra-fast charging. Installing a single 160 kW+ unit creates a massive power deficit, often requiring a dedicated transformer substation or the integration of Battery Energy Storage Systems (BESS) to bridge the gap without expensive grid upgrades.

Furthermore, Safety Regulations impose strict constraints. Integrating high-voltage equipment near flammable liquid fuels requires rigorous adherence to fire safety zones (ATEX regulations). Operators must often undertake significant civil works to position chargers safely away from fuel dispensers and underground tanks, which can compromise traffic flow on smaller forecourts.

2. Benefit from international, national and regional policy support

To meet Ukraine's ambitious electrification targets, the government has recognised that private capital cannot bear the full burden of infrastructure development alone. As of early 2026, a comprehensive framework of support has been established to de-risk these investments, shifting from simple declarations to tangible financial instruments.

Access to affordable capital

The significant development took place on January 29, 2026, when the Cabinet of Ministers expanded the "Affordable Loans 5-7-9%" programme: ;reviously focused on working capital, the programme now explicitly covers "energy resilience projects," which includes the construction of high-power charging hubs. Eligible businesses can now access credit limits increased to UAH 250 million with state-subsidised interest rates (typically 5–9% in UAH), which is drastically lower than commercial market rates. This mechanism effectively provides cheap capital for high-CAPEX equipment like 160 kW+ DC chargers and energy storage systems.

Fiscal incentives for hardware

Complementing these loans are targeted fiscal incentives designed to lower the upfront cost of equipment. It is important for investors to distinguish between the policies for vehicles and infrastructure: while the VAT exemption for electic vehicles expired on January 1, 2026, the exemptions for critical energy infrastructure equipment remain in force until January 2029. This means

that the import of specific components - such as inverters, transformers, and charging stations classified under critical HS codes - is exempt from VAT and import duties. For an operator rolling out a national network, this translates to a direct CAPEX reduction of approximately 20–25%.

Streamlining land and grid access

Beyond financial aid, the state is moving to reduce bureaucratic friction. At the municipal level, Lviv has set a precedent with its transparent auction model for communal land allocation. Instead of opaque permit processes, operators can now compete openly for pre-approved locations, reducing corruption risks and deployment time. At the national level, the Ministry of Energy has launched an interactive map[6] of priority locations for charging stations. This tool, developed in coordination with Distribution System Operators (DSOs), identifies "white spots" on highways where grid connection is technically feasible, helping investors avoid sites with prohibitive connection costs.

European integration and grants

Finally, Ukraine's integration into the European transport network (TEN-T) opens access to EU-level funding. Ukrainian companies are now eligible to apply for grants under the "Connecting Europe Facility" (CEF), which co-finances alternative fuel infrastructure along major transport corridors. This provides a unique opportunity for FSOs to secure non-repayable grant funding for flagship projects on key routes like Kyiv–Chop or Kyiv–Odesa, further improving the return on investment.

3. Increase investment in upgrading charging station capacity with a transition to ultra-fast charging in line with common connectors

The Ukrainian EV fleet is currently undergoing a rapid structural shift. While early adoption was dominated by US imports, 2024 saw a massive influx of Chinese vehicles (e.g., BYD, VW ID.4), which accounted for 85% of new registrations and utilise the GB/T standard. Simultaneously, CCS remains the strategic priority for high-speed infrastructure due to its alignment with European standards.

To remain relevant, FSOs must deploy multi-standard ultra-fast hubs (150 kW+) that support CCS, GB/T, and CHAdeMO. This versatility creates a universal charging environment, capturing the high-growth Chinese segment while maintaining compatibility with the premium European fleet. This approach minimizes the risk of equipment obsolescence and maximizes asset utilisation.

Investing in speed creates a new operational paradigm. Reducing average session times, does not erode retail revenue; rather, it elevates the customer experience. A 30-minute stop represents the golden window - sufficient time for a high-margin coffee or meal, yet short enough to feel efficient for the driver. By prioritising speed, FSOs do not just sell electrons; they build loyalty, ensuring customers return for the premium service rather than being held hostage by slow infrastructure.

[6] Google Maps, URL: https://shorturl.at/h7VRa

4. Integrate additional services (e.g., food courts, coffee shops, rest areas) to improve customer comfort while waiting.

The shift to electromobility is fundamentally changing the nature of the service stop, requiring petrol stations to transform into multifunctional hubs. Since even ultra-fast charging requires a dwell time of at least 20 minutes, there is a critical need for high-quality amenities that go beyond a basic shop. Leading Ukrainian operators like OKKO are responding by upgrading their food courts to offer full dining experiences, such as Asian cuisine, while ensuring sites have robust Wi-Fi and comfortable rest areas. In the current context of wartime Ukraine, these amenities serve a dual purpose: providing not just comfort, but a safe and reliable haven for drivers navigating long journeys in changing security conditions.

To ensure these customers return, FSOs are increasingly merging EV charging into their core loyalty ecosystems. Programmes like OKKO's Fishka allow drivers to earn points on charging sessions that can be exchanged for food or coffee, effectively cross-subsidising the cost of energy with retail rewards. Similarly, networks like TOKA and YASNO are utilising gamification and seamless app integration to maintain high levels of user retention. This digital connection ensures that the EV driver is treated with the same sophisticated retention strategies as a traditional fuel customer, rather than as an anonymous user of a utility.

Looking ahead, the market is currently in a transitional "hybrid" phase, offering both fossil fuels and electrons side-by-side. However, the long-term trend – already visible in the UK and EU – is moving towards the concept of dedicated 'Electric Forecourts'. These are purpose-built locations designed specifically for the longer stay of EV drivers, prioritizing business meeting pods, lounge-style environments, and premium retail over the traditional pump-centric layout. As the ratio of EVs to internal combustion engine vehicles climbs, Ukrainian FSOs will need to prepare for this architectural shift, moving from simply adding chargers to existing stations to designing sites around the electric experience from the ground up.

5. Invest in your own charging apps.

The mobile app has become the interface between the charging point operator and the EV driver: in addition to pricing, the mobile app is the opportunity for FSOs to differentiate themselves from the competition by using the app to provide the customer with a better charging experience and as platform to bundle in additional services, promotions and loyalty rewards. FSOs should seek to develop existing loyalty apps or create new and dedicated charging apps, combining payment services and information relating to charging station location, availability status and charging history.

Independent charging stations in Ukraine, managed by organisations such as TOKA, UGV Chargers, and services available through the PlugShare and EV UA apps, provide flexible alternatives to network facilities. For example:

- The UGV Chargers app allows users to search, book and pay for sessions online, ensuring availability in residential areas.
- TOKA offers a map of stations and the option to purchase home chargers, and its app supports the reservation of public spaces near residences.
- PlugShare helps drivers find the nearest chargers and check their availability in real time.
- EV UA provides a pocket map of stations with a capacity of over 80 kW, which helps in finding and reserving chargers near your place of residence.

These independent options and booking services are said to address urban density issues, similar to the situation in Europe, where 42% of city dwellers[7] do not have access to home charging. They provide convenient on-demand access, reducing competition for spaces.

It is important to note that the reservation functionality in the Ukrainian market typically operates as a short-term digital hold rather than a physical parking bay blockade. Most mass-market CPOs (like TOKA or UGV) allow users to lock a specific connector via the app for a 15–20 minute window while en route. This effectively prevents another EV driver from initiating a charge digitally, addressing "queue anxiety."

A notable exception to this model is GO TO-U, a platform that has built its core value proposition around Advance Reservation Technology. Unlike standard CPOs, GO TO-U focuses on "destination charging" locations (hotels, shopping centres) where on-site staff or smart barriers can physically manage parking access. By allowing drivers to book charging slots hours or days in advance, they have successfully mitigated the reliability risks.

6. Consider inorganic growth through M&A and/or partnerships with EV CPOs

For FSOs, acquiring stakes in independent players integrating with apps such as PlugShare or EV UA, may be commonly viewed as a rapid and efficient start as it provides ready-made infrastructure, customer base and digital solutions.

However, replicating the market dominance of alliances like OKKO-TOKA requires substantial capital expenditure. While M&A offers the fastest route to scale, it is inherently a high-investment strategy that demands rigorous scrutiny. Acquiring a CPO requires a specialised Due Diligence (DD) process that goes beyond standard financial auditing. Critically, FSOs must scrutinise the quality of revenue, distinguishing between one-off hardware sales and recurring charging income to ensure true cashflow visibility. Equally vital are the contractual terms and land rights: investors must verify that the target's network is built on secure, long-term leases rather than precarious short-term agreements. Technical due diligence must uncover potential "orphan assets" by assessing warranty and maintenance obligations tied to the installed hardware and the stability of the Charging Point Management System (CPMS). Finally, the valuation must account for regulatory future-proofing-ensuring the infrastructure complies with upcoming EU-aligned standards and is eligible for government subsidies, thereby mitigating the risk of unforeseen retrofitting costs.

[7] McKinsey, URL: https://shorturl.at/z9hwP

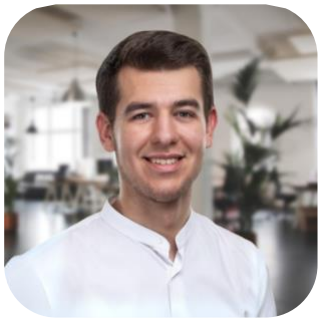
If an FSO chooses to acquire a CPO, it inherits a network that often extends far beyond its own forecourts into - streets, workplaces, and private homes. This forces a critical strategic choice: should the FSO attempt to "own the customer" everywhere, or strictly focus on its retail estate?

Originally, European giants like BP and Shell adopted the expansive strategy. By acquiring players like Chargemaster (rebranded as BP Pulse) and NewMotion (Shell Recharge), they aimed to maintain digital ownership of the driver 24/7, servicing them at home, at work, and on the road via a single app. However, as the UK and EU markets have matured, this vertically integrated model has proven difficult to execute against agile specialists in each sub-segment. Consequently, a trend of strategic retraction has emerged. Major energy players are increasingly divesting from home and slow public charging to refocus capital solely on their high-margin ultra-fast forecourt hubs, where their competitive advantage is strongest. Ukrainian FSOs must weigh this lesson carefully: acquiring a CPO offers a quick start, but managing a scattered, low-margin network outside the forecourt requires resources often distinct from the core fuel retail business.

As an alternative to the heavy capital commitment of full acquisition, FSOs should consider a Hosting Framework or Joint Venture (JV). In this model, the FSO grants an existing CPO the right to install stations on its forecourt in return for ground rent or a revenue share. This offers a "Capex-lite" entry into the market: the FSO leverages its prime real estate and facilitates grid access (sharing the cost of necessary capacity upgrades) alongside the existing customer base flowing to the stations, while the partner CPO handles the hardware investment and operational complexity. Provided the forecourt locations promise high utilisation, this approach allows for rapid deployment without the risks of inheriting legacy technology. Crucially, such agreements can still include commercial clauses for cross-promotion, ensuring that EV drivers are incentivised to use the FSO's retail and coffee facilities while charging, maintaining the core business synergy.

While the history of M&A in Ukraine's e-mobility sector is still nascent, the market leader has already set a definitive precedent. In 2025, OKKO officially acquired a 50% stake in the TOKA network. This strategic move allowed OKKO to bypass the slow pace of organic growth and achieve instant hybrid dominance: maintaining its proprietary network of ~60 ultra-fast hubs for highway transit, while securing an immediate foothold in TOKA's 200+ urban locations. Ultimately, this deal demonstrates that for Ukrainian FSOs, the fastest route to national coverage is no longer just construction, but consolidation.

Authors



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