



# Investor Presentation

January 2025

Fastned's first shop at Brecht station  
opened on 15th April





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# Investment **Highlights**

1

**European leader in public DC fast charging** with proven location strategy, targeting only high traffic locations

3

**Best-in-class and most recognisable charging concept** in the market, with key functions optimised in house

5

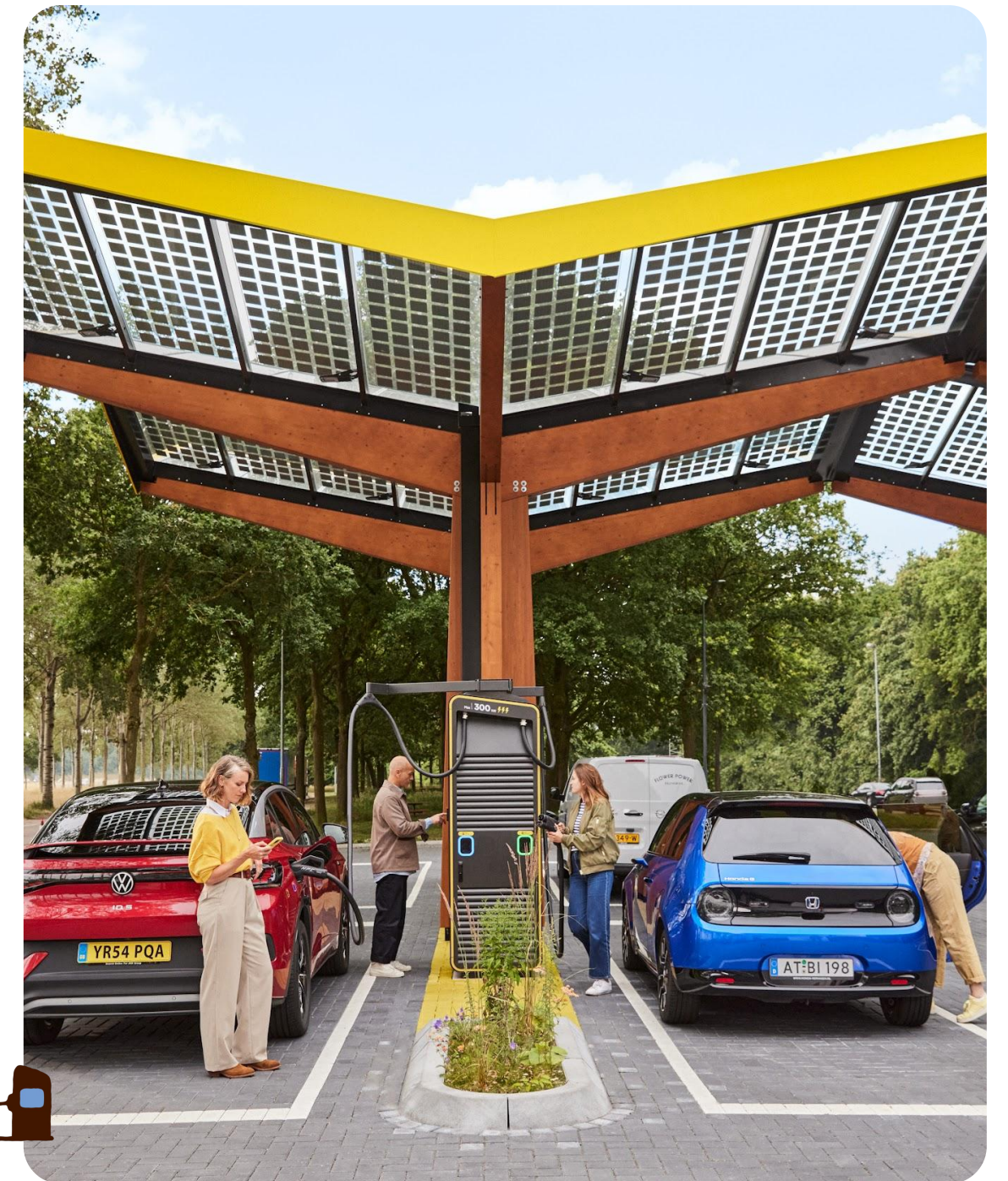
**Mission-driven company with ESG at the core of everything we do**

2

Best positioned to both **capture and enable the tailwind of BEV adoption** by improving access to charging infrastructure

4

**Market-leading station economics and business model** supported by high traffic levels and capex efficiency

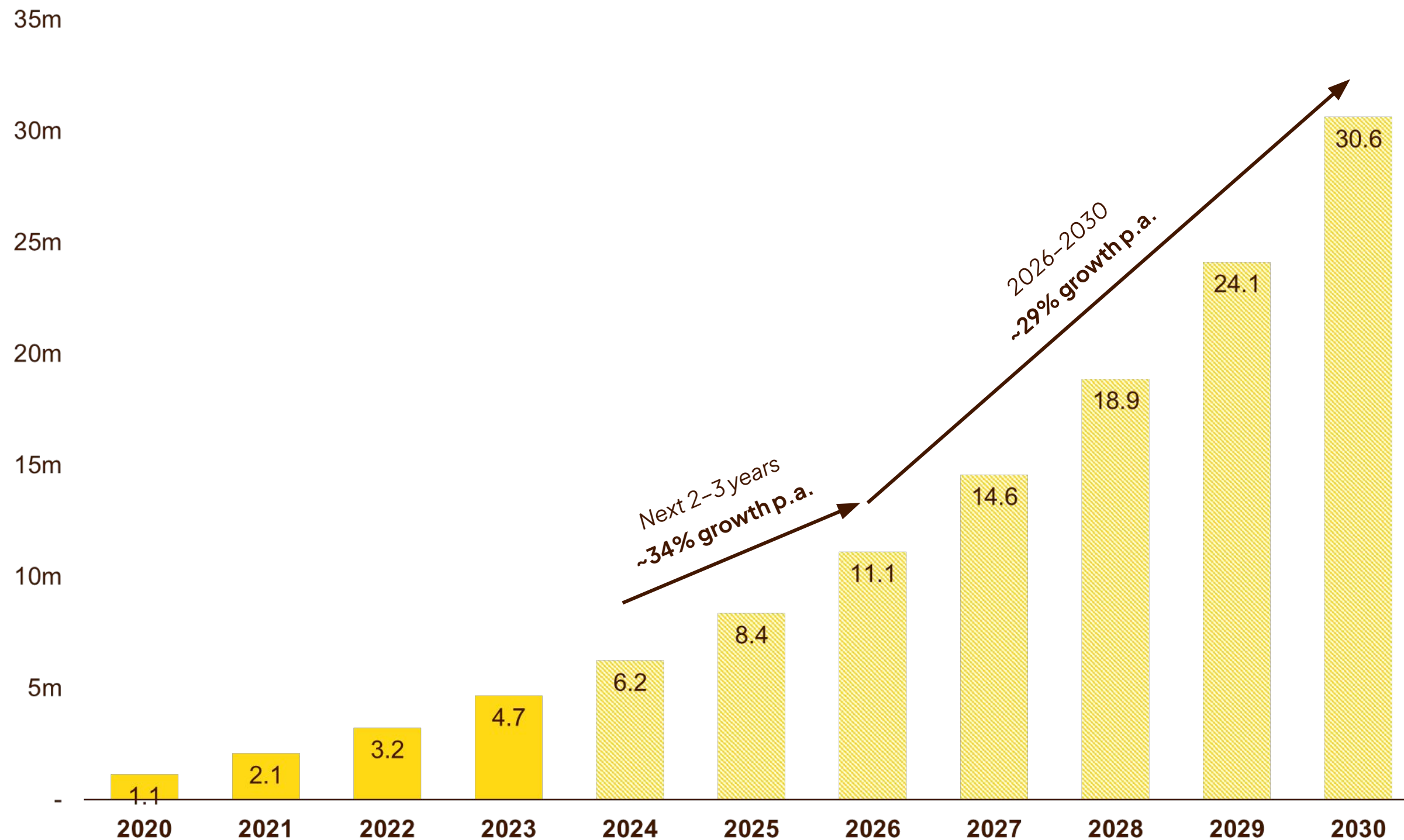




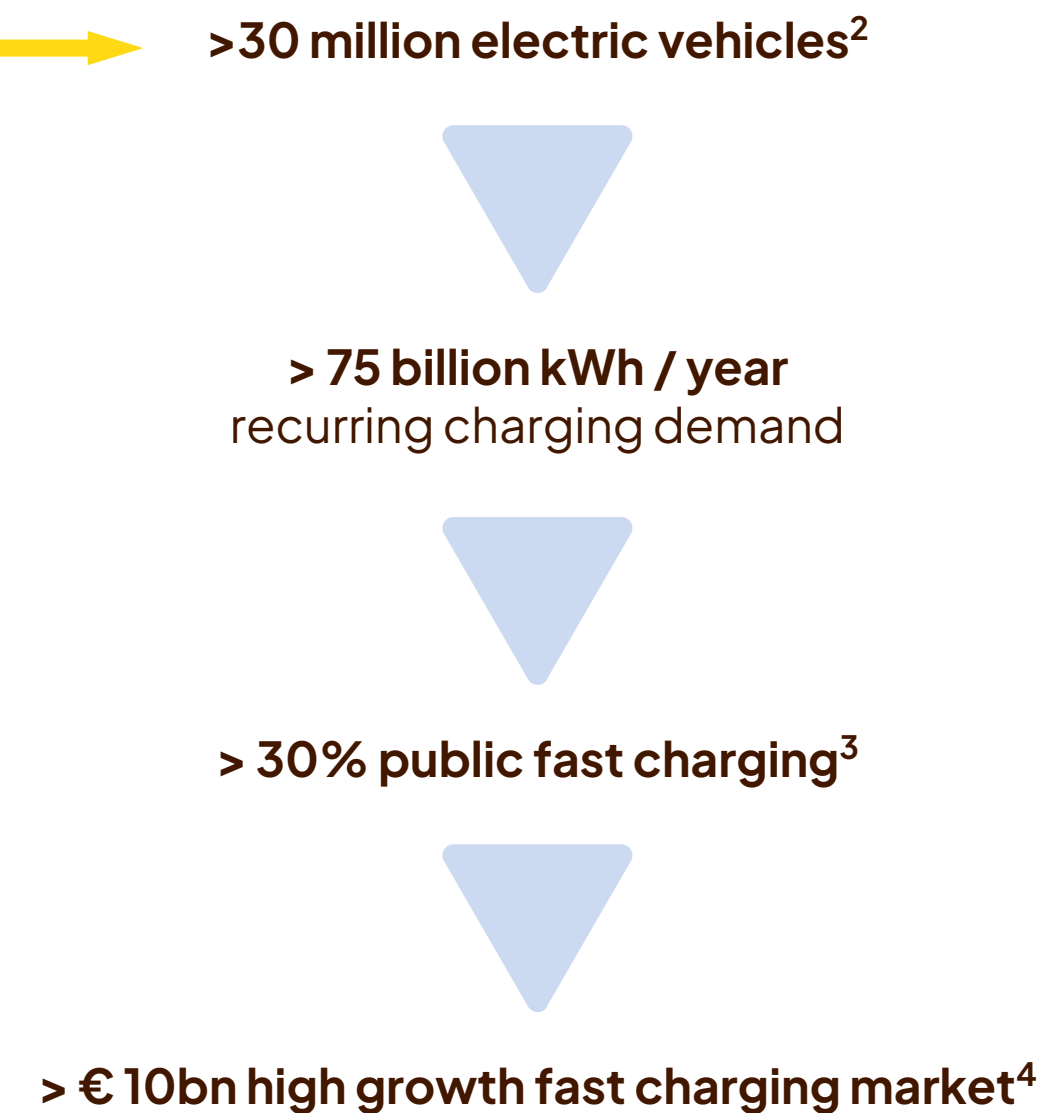


# The BEV fleet is scaling: creating a large, high growth fast charging market

BEV fleet in Fastned's operating geographies<sup>1</sup>



2030 BEV Charging Market



Notes: 1) Operating geographies include short and long term targets such as Spain, Italy, Ireland, Poland. 2) Source: Schmidt Automotive Research October 2024. Only covers Fastned operating geography. 3) BNEF Electric Vehicle Outlook 2024. 4) Fastned analysis








## Fastned ranks among the top three fast charging companies in Western Europe<sup>1</sup>

### Type

### Main location strategy

|   |                  |                                    |
|---|------------------|------------------------------------|
|    | Car manufacturer | Off highway (navigational pull)    |
|    | Pure play        | High traffic roads                 |
|    | Utility          | Destination charging               |
|    | Car manufacturer | High traffic roads                 |
|  | Oil major        | Adding chargers on petrol stations |
|  | Pure play        | Off highway                        |
|  | Pure play        | High traffic roads                 |
|  | Utility          | Destination charging               |
|  | Oil major        | Adding chargers on petrol stations |
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2023 energy volume sold<sup>1</sup>

Sources: 1–UK, Netherlands, Belgium, Germany, France, Switzerland Public data. Fastned analysis. Tesla data are estimates



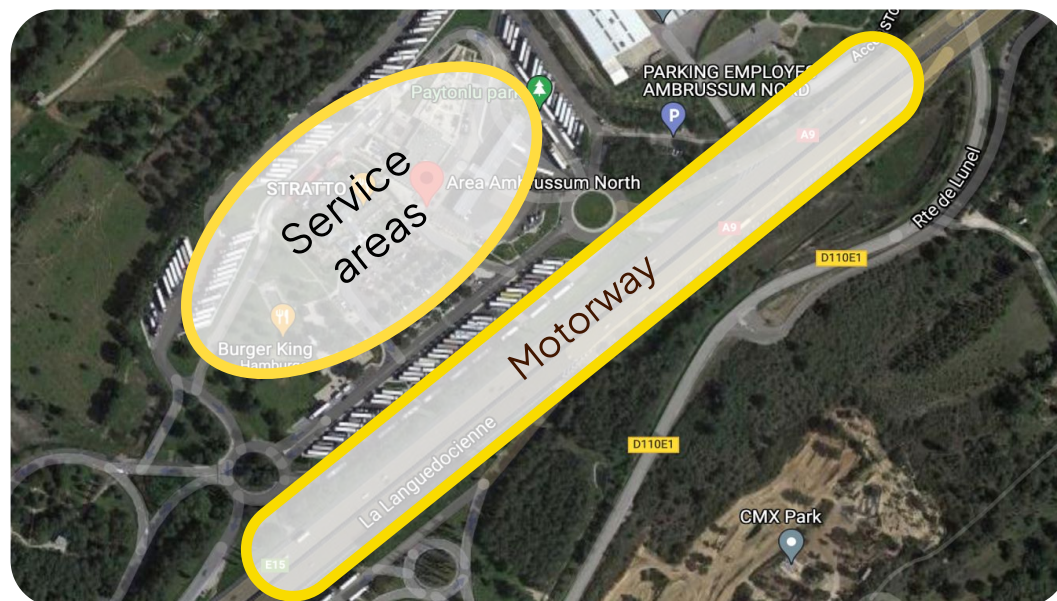


# We have built the **best charging concept** in the market

1

## High traffic location strategy

High traffic business case supports the necessary investment to realise best charging concept



2

## Vertically integrated business model

Public affairs & network development



Construction & engineering



Station design



Operations & maintenance



Customer support

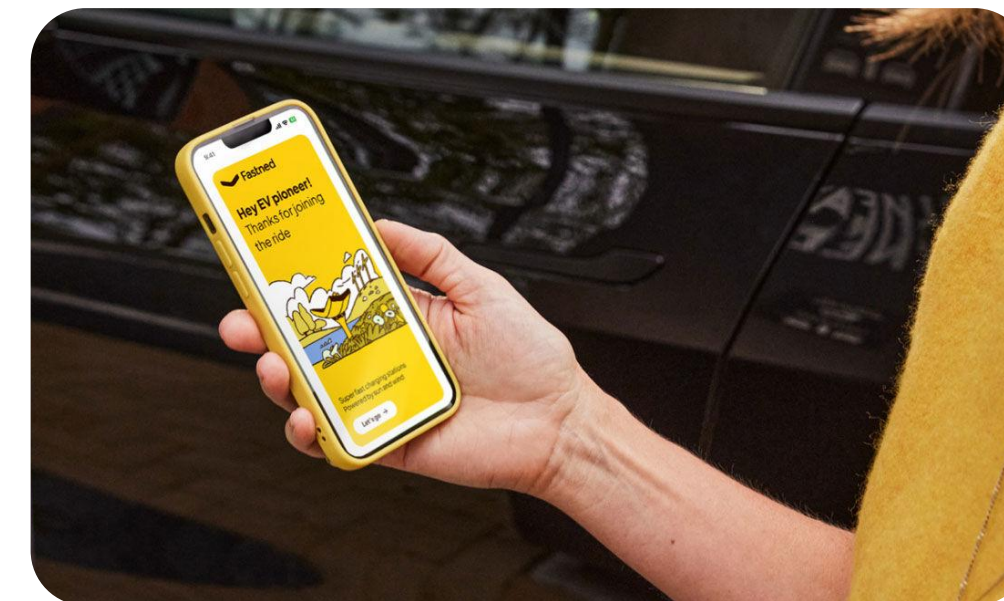


Software backbone & app



3

## Best customer experience



**99.9%**  
station uptime

**60**  
customer NPS

**Google**  
**4.4 / 5**  
Google location reviews

**Chargemap**  
**#1**  
charging network





# Fastned is the top choice for EV drivers due to high quality and reliability

AUTOBLOG.NL

Chargemap

zapmap



Favourite fast charging network survey<sup>1</sup>



Most reliable charging network<sup>2</sup>



Best EV Charging Network 2024/25<sup>3</sup>

|    |                | % favourite |
|----|----------------|-------------|
| 1  | Fastned        | 43%         |
| 2  | TESLA          | 31%         |
| 3  | IONITY         | 15%         |
| 4  | Other          | 4%          |
| 5  | Shell Recharge | 4%          |
| 6  | Allego>        | 1%          |
| 7  | TotalEnergies  | 1%          |
| 8  |                |             |
| 9  |                |             |
| 10 |                |             |

|                                  |
|----------------------------------|
| Fastned                          |
| TESLA                            |
| ELECTRA                          |
| Carrefour                        |
| Allego>                          |
| CHARGEY                          |
| IONITY                           |
| e-Vadea<br>Recharge ultra rapide |
| la recharge                      |
| sdem50                           |

|                                  | 5-star rating | 2023 ranking |
|----------------------------------|---------------|--------------|
| TESLA                            | 4.7           | N/A          |
| Fastned                          | 4.1           | 1            |
| mfg EVPOWER<br>Fast Clean Energy | 3.8           | 2            |
| Osprey                           | 3.6           | 3            |
| BEV                              | 3.5           | N/A          |
| IONITY                           | 3.5           | 4            |
| GRIDSERVE<br>SUSTAINABLE ENERGY  | 3.3           | 6            |
| INSTAVOLT                        | 3.3           | 5            |
| eplegreen electric               | 3.2           | N/A          |
| Shell Recharge                   | 2.5           | 7            |

1) [Autoflow charging network survey 2024](#)  
2) [ChargeMap 2023 rankings of best charging networks in Europe](#)  
3) [Zapmap Best EV Charging Networks 2024](#)



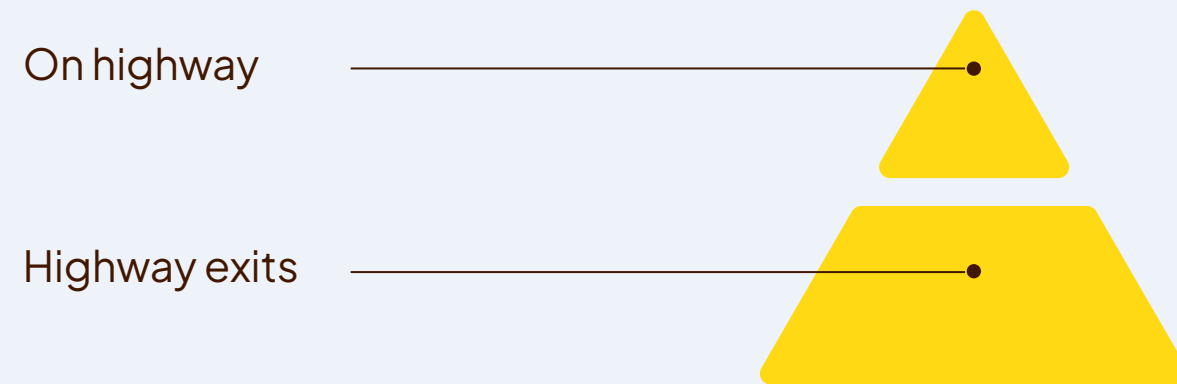
## Location availability

100,000+ sites in Europe , **10,000+** with a great business case

## Portfolio ambition

We will build the majority of our locations on/near the **high traffic roads**

### Fastned

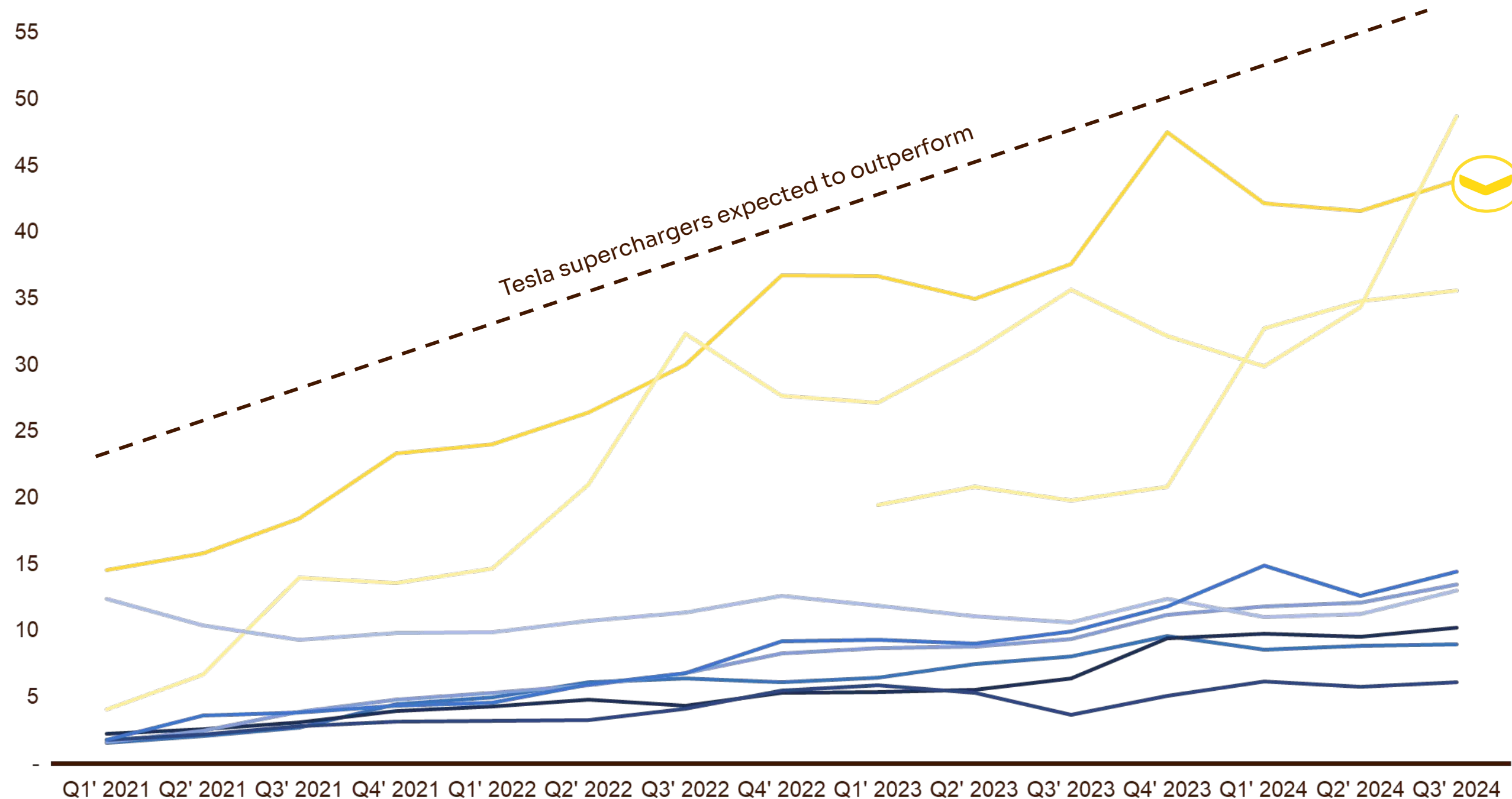






# A high traffic location strategy and best-in-class charging concept leads to outsized sessions per station

Daily sessions per station<sup>1</sup>



High Sales per station

Fastned TESLA

IONITY GRIDSERVE SUSTAINABLE ENERGY

Low Sales per station

bp pulse EnBW

EWE Go Allego

Shell Recharge Osprey

1) Source: Charge Radar, excludes Tesla. Fastned's operating geography – Netherlands, Belgium, Germany, UK, France, Switzerland.





# Station economics

€k

Average station  
Q4 2019

Average station  
Q3 2024

Average station  
2030

1

2

3

4

|   |                    |                    |                      |
|---|--------------------|--------------------|----------------------|
| Average daily traffic                         | ~30k               | ~30k               | ~30k                 |
| BEV fleet penetration                         | ~0.9% <sup>1</sup> | ~4.7% <sup>1</sup> | ~20% <sup>1</sup>    |
| Sessions per day                              | 14                 | 45                 |                      |
| <b>Average MWh (Annualised)</b>               | <b>105 MWh</b>     | <b>437 MWh</b>     | <b>&gt;2,000 MWh</b> |
| Annualised revenue / station                  | 61 <sup>2</sup>    | 271 <sup>2</sup>   | >1,000 <sup>2</sup>  |
| Gross margin                                  | 51 (€0.49/kWh)     | 224 (€0.51/kWh)    |                      |
| Operating costs per station                   | 31                 | 99 <sup>3</sup>    |                      |
| <b>Operational EBITDA (B)</b>                 | <b>20 (33%)</b>    | <b>125 (46%)</b>   | <b>&gt;400 (40%)</b> |
| Initial investment (A)                        | 307                | 710                |                      |
| <b>ROIC (= B / A)</b>                         | <b>7%</b>          | <b>18%</b>         |                      |
| Utilisation rate                              | 9.9%               | 11.9%              |                      |
| ROIC at 30% utilisation, current charge speed | >40%               | >40%               |                      |

1

Top line growth is directly linked to BEV adoption – large revenue tailwinds

2

Best-in-class charging concept captures more traffic resulting in higher number of sessions vs peers

3

Outsized session numbers lead to a superior business case which allows price flexibility

4

Fully wrapped construction capability delivers high quality and capex efficient infrastructure

1) Station-weighted average where relevant, 2) Annualised revenue related to charging for the period, 3) Based on €16.6k per charger





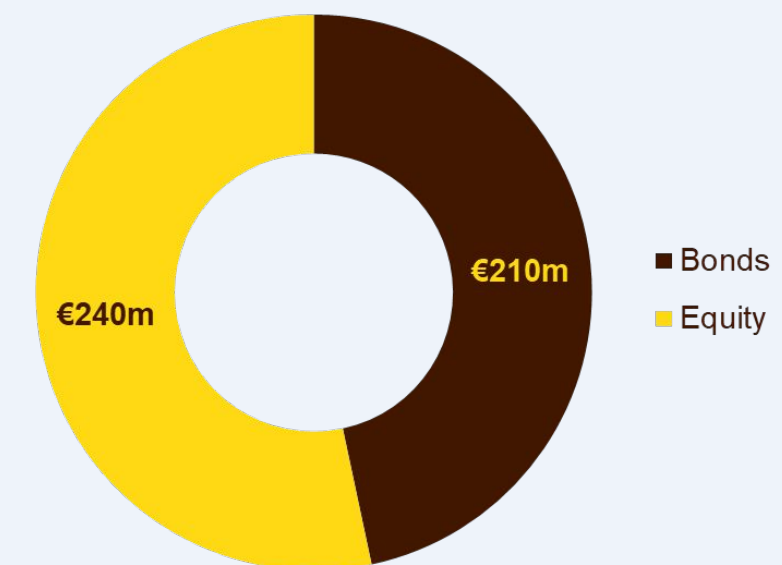
## Funded until at least end of 2025 with a strong cash position and retail bond program

**Fastned is in complete control of its capex program and therefore can control its future funding need**

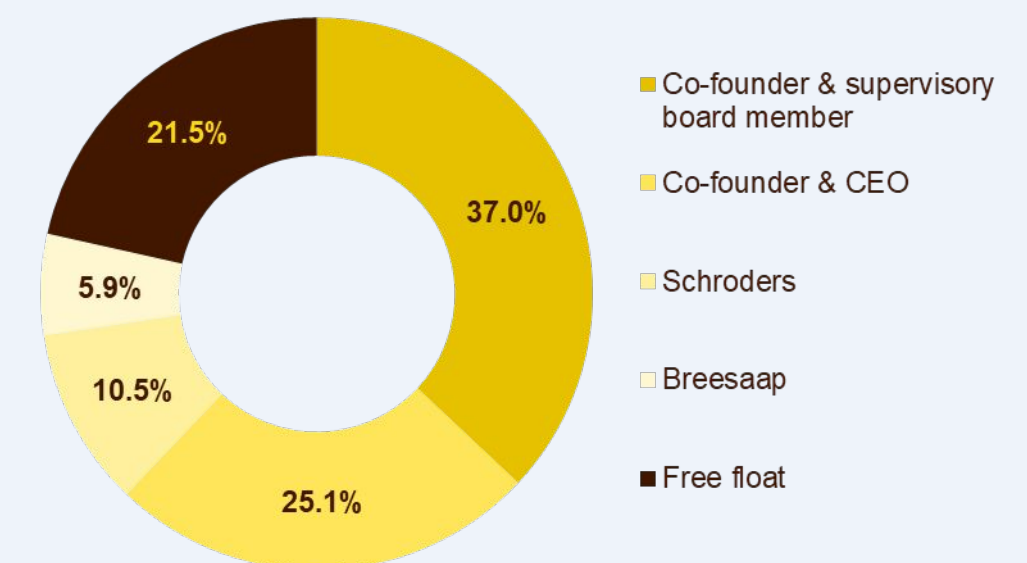
### Funding to date:

- ✓ ~€ 240 million in equity funding, through a combination of private placements, an accelerated bookbuild and founders investments  
In Q4 2022, Schroders' infrastructure fund invested €75m in equity, became a board member, and long-term partner in our target of 1,000 stations by 2030
- ✓ >€ 210 million in retail bond funding
- ✓ Current cash level of €146m (June 2024) and a further retail bond allows us to build out to more than 420–450 operational stations, expected by end 2025

### Current funding



### Shareholding structure







## Guidance & outlook

### Network

- 335 to 350 stations operational by year end 2024
- 420 to 450 stations operational by year end 2025
- Target of 1,000 stations before 2030

### Financial<sup>1</sup>

- Revenue / station >€400k in 2025 and >€1m in 2030
- Operational EBITDA margin >40% by 2025
- Underlying company EBITDA positive in 2024

**Source:** 1–Based on current forecasts. Underlying company EBITDA excludes exceptional items such as employee options.





#### Our mission

To accelerate the transition to electric mobility

#### Our goal

1,000 charging stations by 2030

#### Our climate impact

With every kWh sold we displace fossil fuels burning into the atmosphere

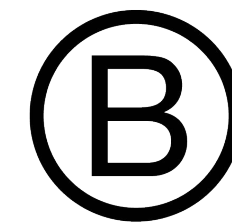


100% local sun, wind & hydro energy<sup>1</sup>

2023 CO2 avoided

**96,148**  
tonnes

Certified



Corporation

1) For every kWh sold through the grid we buy local (same or adjacent country) solar & wind guarantees of origin





# Appendix A **Management & Leadership**





Highly motivated,  
mission driven team –  
**led by an experienced  
Executive Team**



**More than 300 people** driving Fastned's  
mission across **8 countries**



**Michiel Langezaal**

CEO & Founder

Previously: AT Kearney, Epyon power, ABB



**Yannick Schuermans**

Director Operations & Analytics

Previously: Uber, Elia Group, Sia partners



**Victor van Dijk**

CFO

Previously: ING



**Georg Schmidt-Holtmann**

Director Construction Management

Previously: AGCO



**Francoise Poggi**

COO

Previously: Tesla



**Caro de Brouwer**

Director Network Development

Previously: Roland Berger, Orsted, Bekaert



**Maria Garcia**

Director Location Design

Previously: Van der Goes Architecten



**Robin Wouters**

Director Product and Engineering

Previously: Philips, Swapfiets, Sanoma



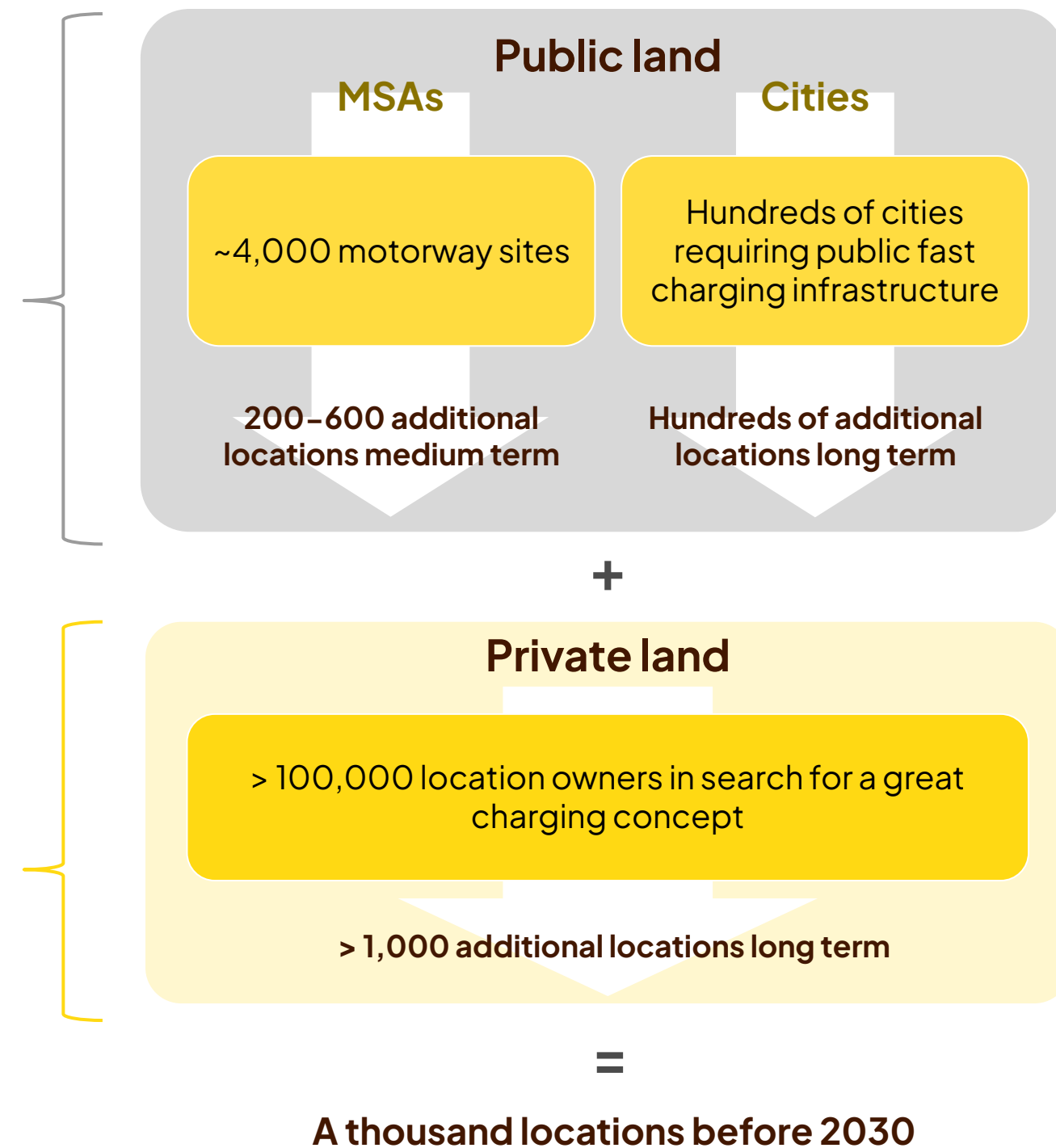
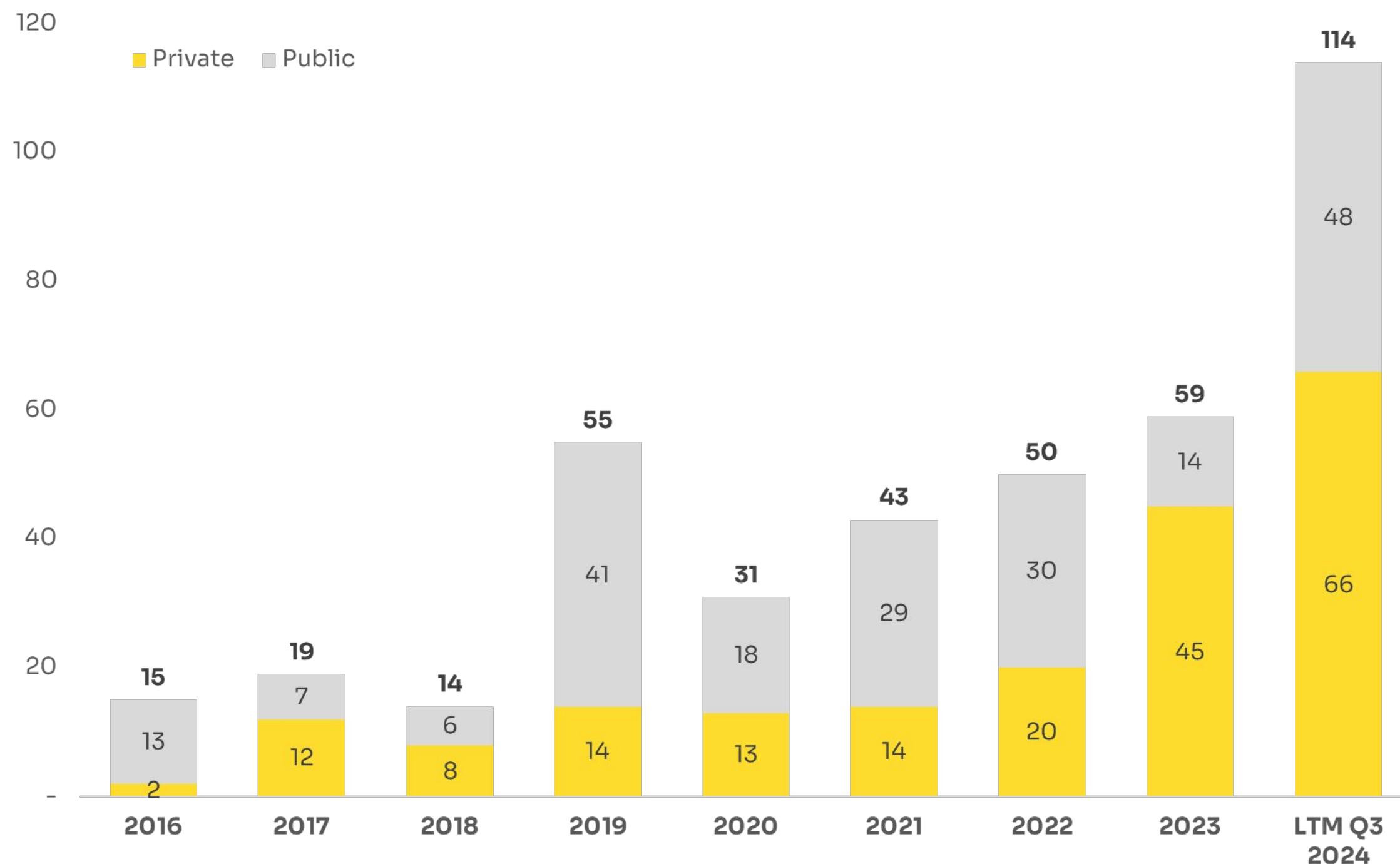
# Appendix B **Network & Pipeline**





# Fastned path to 1,000 high-traffic locations: motorway service areas, private land and urban sites

Sites secured on private and public land<sup>1</sup>

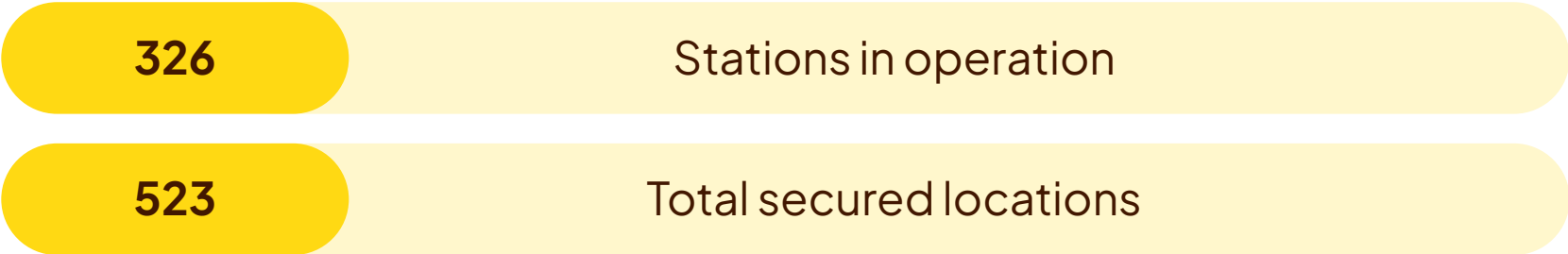


<sup>1</sup>) LTM = last twelve months



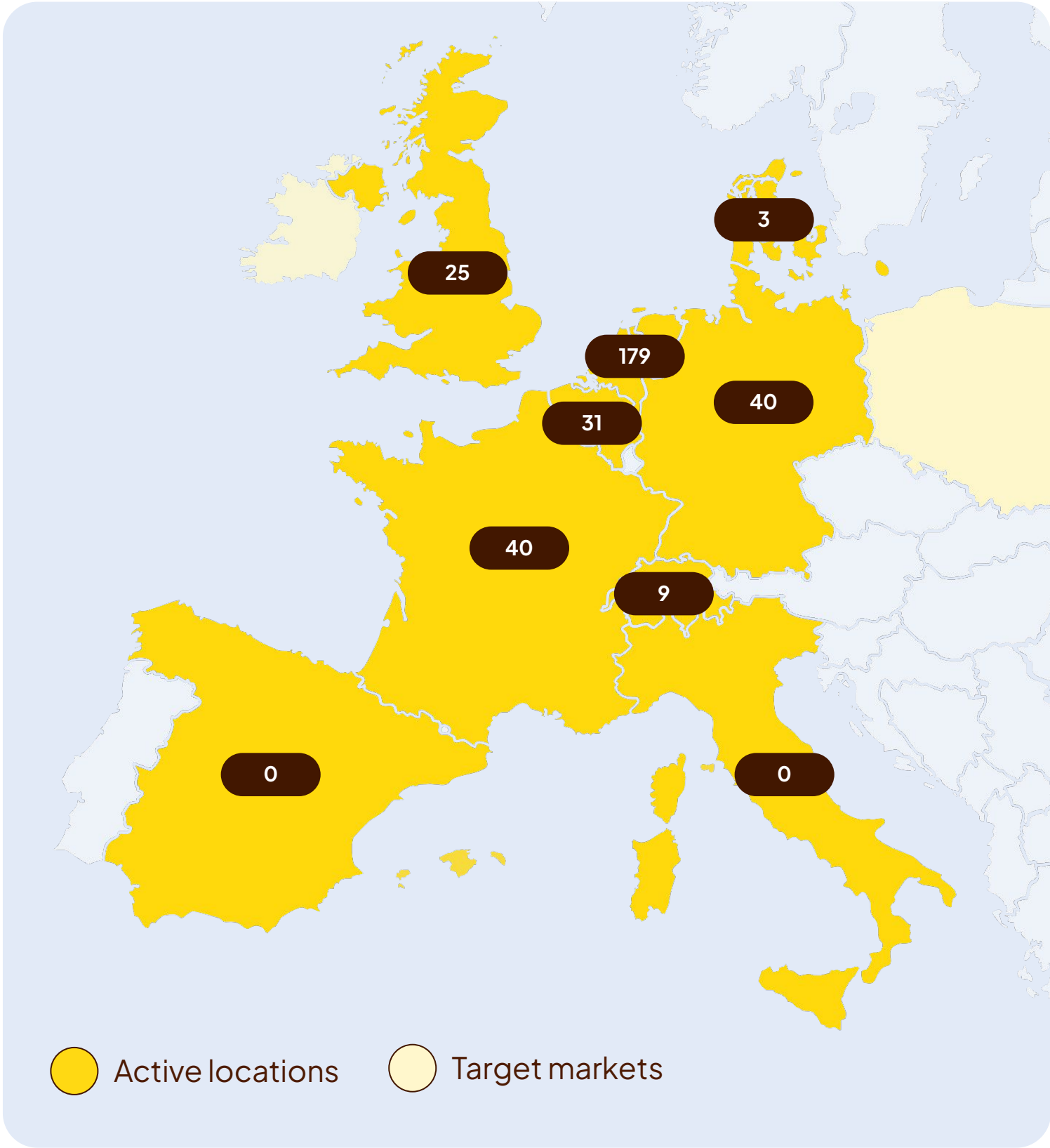
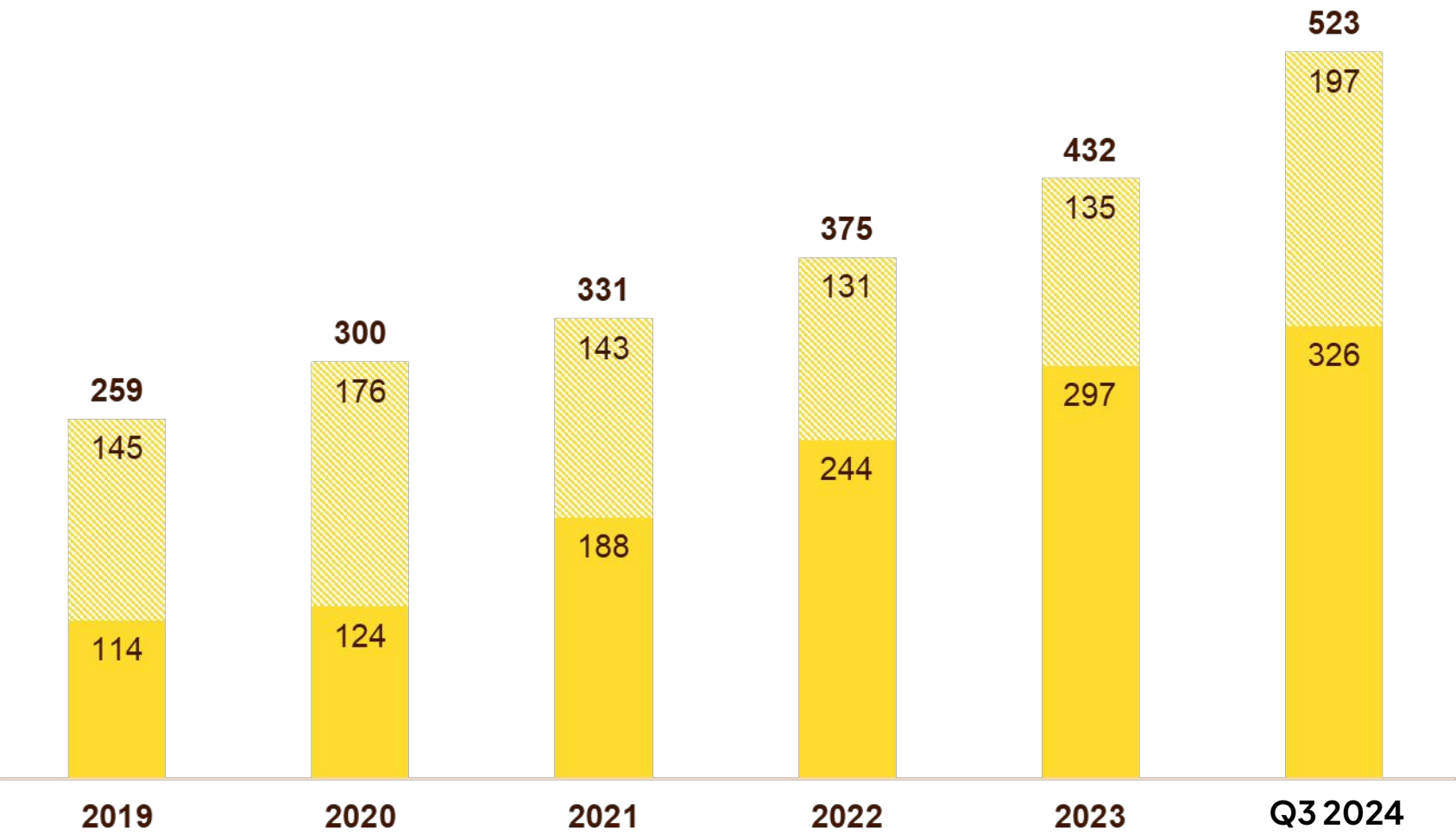


# Halfway to 1,000 stations: 500+ sites secured



Historical station pipeline

■ Operational ■ Secured
















# Expanding into **new markets**

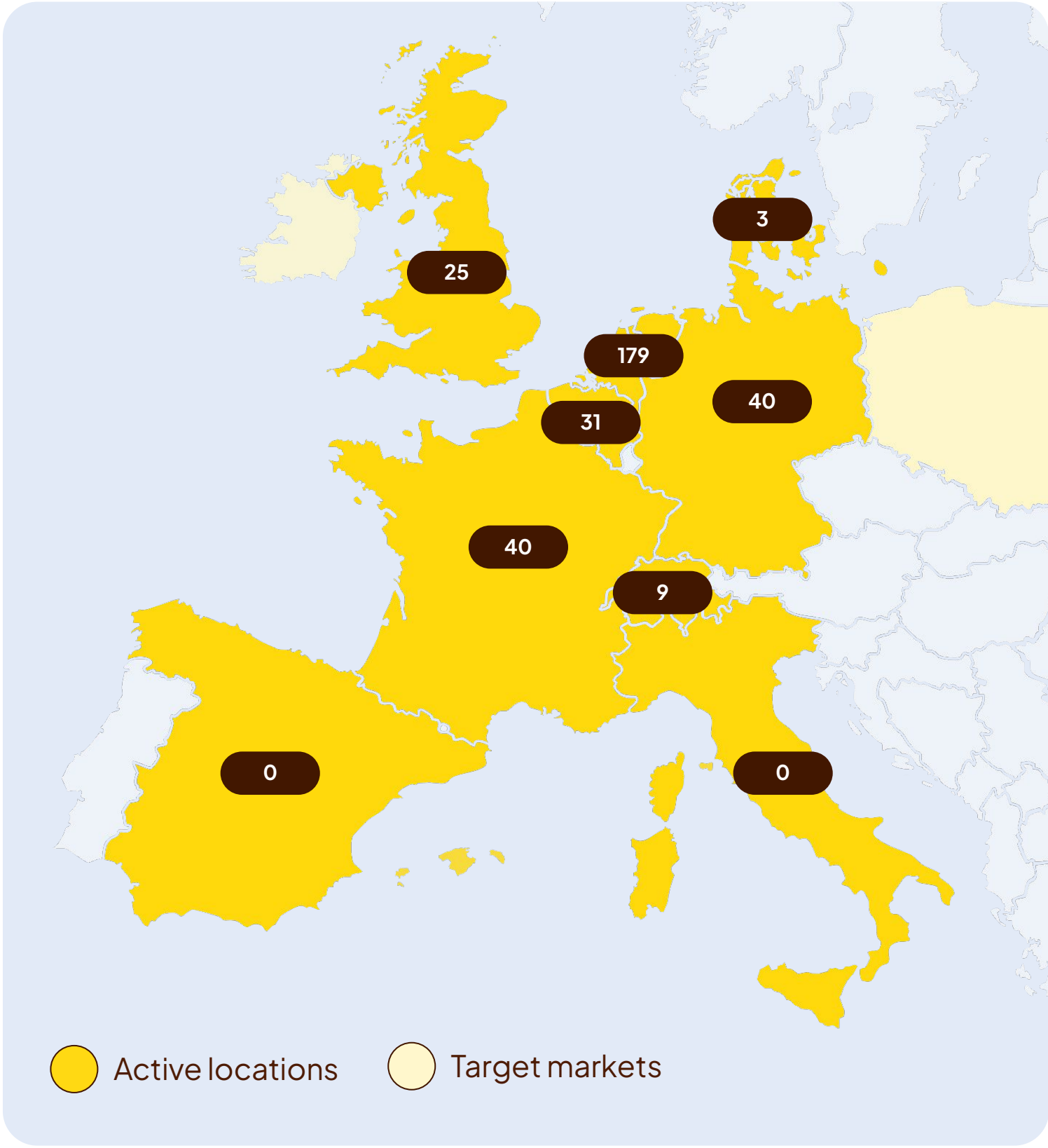
326

Stations in operation

523

Total secured locations








|   | In operation | Under development | Total |
|---|--------------|-------------------|-------|
|    | 179          | 26                | 205   |
|    | 39           | 50                | 89    |
|   | 31           | 32                | 63    |
|  | 40           | 21                | 61    |
|  | 25           | 27                | 52    |
|  | 9            | 19                | 28    |
|  | -            | 8                 | 8     |
|  | 3            | 1                 | 4     |
|  | -            | 13                | 13    |







Pioneering the way with **1,943** chargers across our scalable network

|   | 300–400kW | 150–175kW | 50kW | Total |
|---|-----------|-----------|------|-------|
|    | 790       | 212       | 29   | 1,031 |
|    | 199       | –         | 24   | 223   |
|   | 184       | 4         | 4    | 192   |
|  | 104       | 5         | 28   | 137   |
|  | 284       | 12        | –    | 296   |
|  | 40        | –         | –    | 40    |
|  | 24        | –         | –    | 24    |
| Total   | 84%       | 12%       | 4%   | 100%  |







# Appendix C **Financial**



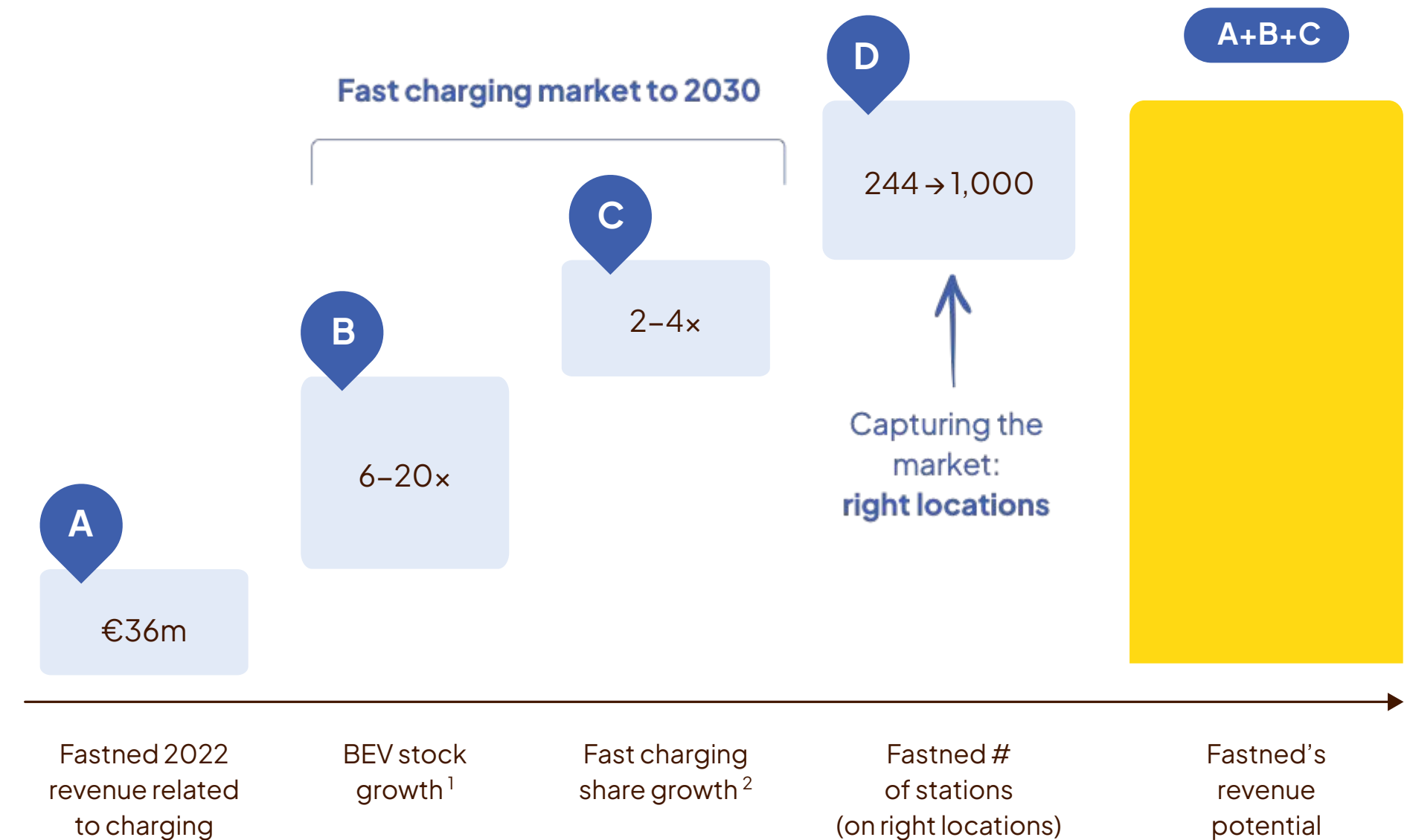


## Fastned revenue potential



BEV stock growth x Fast charging growth  
x Right location growth

- ✓ Fast charging demand accelerating- 6-20x more BEVs- 2-4x more fast charging
- ✓ High traffic locations are paramount to capture this market
- ✓ Fastned # locations to grow 4x
- ✓ Revenue potential growing accordingly







# Strong organic and inorganic **revenue growth**

|          | H1, € million                            | YoY % | 2024          | 2023          | 2022          |
|----------|--|-------|---------------|---------------|---------------|
| <b>1</b> | <b>Revenues related to charging</b>      | 45%   | 37.8          | 26.1          | 12.6          |
| <b>2</b> | <b>Gross profit related to charging</b>  | 52%   | 29.8          | 19.6          | 7.8           |
|          | Gross profit per kWh (€)                 |       | 0.47          | 0.47          | 0.38          |
|          | Network operation costs                  | 67%   | (15.0)        | (9.0)         | (4.8)         |
|          | Network operation costs per charger (€k) |       | 8.3           | 6.6           | 5.7           |
| <b>3</b> | <b>Operational EBITDA</b>                | 39%   | 14.7          | 10.6          | 3.0           |
|          | Operational EBITDA margin                |       | 39.0%         | 40.6%         | 23.8%         |
|          | Network expansion costs                  |       | (10.9)        | (7.8)         | (5.6)         |
| <b>4</b> | <b>Underlying company EBITDA</b>         | 40%   | 3.2           | 2.8           | (2.7)         |
|          | Exceptional items                        |       | 0.1           | (3.3)         | (0.4)         |
|          | <b>EBITDA</b>                            |       | <b>3.3</b>    | <b>(0.5)</b>  | <b>(3.0)</b>  |
|          | D&A and provisions                       |       | (9.8)         | (6.9)         | (4.7)         |
|          | Finance income / (cost)                  |       | (4.9)         | (2.2)         | (3.7)         |
|          | <b>Underlying net profit</b>             |       | <b>(11.6)</b> | <b>(6.3)</b>  | <b>(11.0)</b> |
| <b>4</b> | <b>Net profit</b>                        |       | <b>(11.4)</b> | <b>(10.3)</b> | <b>(11.4)</b> |

## **1 Strong organic and inorganic revenue growth**

Fastned has two big revenue growth drivers:

- **Organic volume growth, at +29% YoY** in H1 2024, at the 244 stations operational at 1 January 2023.  
This is driven by the (secular) expansion of the BEV fleet (+31% YoY fleet penetration growth in H1 2024) and Fastned being able to capture charging demand growth at existing stations at high traffic locations
- **Inorganic growth through new station openings, at +21% YoY** in H1 2024, with 76 stations opened since 1 January 2023 (+31%).  
This is driven by Fastned's ability to secure new high traffic locations, deploy its award winning charging concept on them and quickly ramp up sales

## **2 Gross profit per kWh stabilised post energy crisis**

## **3 Significant expansion of Operational EBITDA**

5-folding over the last two years, due to a high operational leverage, with significant upside. Close to our target of 40% Operational EBITDA margin

## **4 Net profit negative, due to high expansion effort**

Negative net profit level now almost fully attributable to network expansion costs. These costs are expensed now, but will yield over the 15+ years of station lifes





# Operating cash flow near neutral and strong funding position

| H1, € million                            | YoY % | 2024   | 2023  | 2022  |
|--|-------|--------|-------|-------|
| Revenues related to charging             | 45%   | 37.8   | 26.1  | 12.6  |
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| Underlying company EBITDA                |       | 3.2    | 2.8   | (2.7) |
| Exceptional items                        |       | 0.1    | (3.3) | (0.4) |
| EBITDA                                   |       | 3.3    | (0.5) | (3.0) |
| Capex                                    |       | 21.9   | 38.0  | 23.4  |
| 5 Operating cashflow                     |       | (1.0)  | (2.5) | (8.3) |
| 6 Cash level                             |       | 145.8  | 132.6 | 116.6 |

## 5 Strong funding position

Funding to date:

- ~ € 250 million in equity funding realised
- ~ € 195 million in retail bond funding, 6% coupons, no financial covenants
- ~ € 146 million in cash on balance sheet

We expect to issue one more retail bond tranche in 2024, funding the 2024/25 rollout

## 6 Operating cash flow near positive

Operating cash flow strongly improved over the last years and is near positive. Note this is including network expansion cash costs of € 12.4 million.

This puts Fastned in an autonomous position:

- Strong organic growth at our existing stations, underpinned by secular BEV fleet growth, will continue to increase operating cash flow generation
- High cash position at € 146 million
- Attractive and successful retail bond programme

Combined, we expect this to fund at least a considerable part of further expansion beyond 2025





# Appendix D **Competition**



## High traffic locations capture fast charging volume

Learnings from one of the most mature BEV charging markets worldwide

Fastned operates nearly 20% of the fast charging locations in the Netherlands

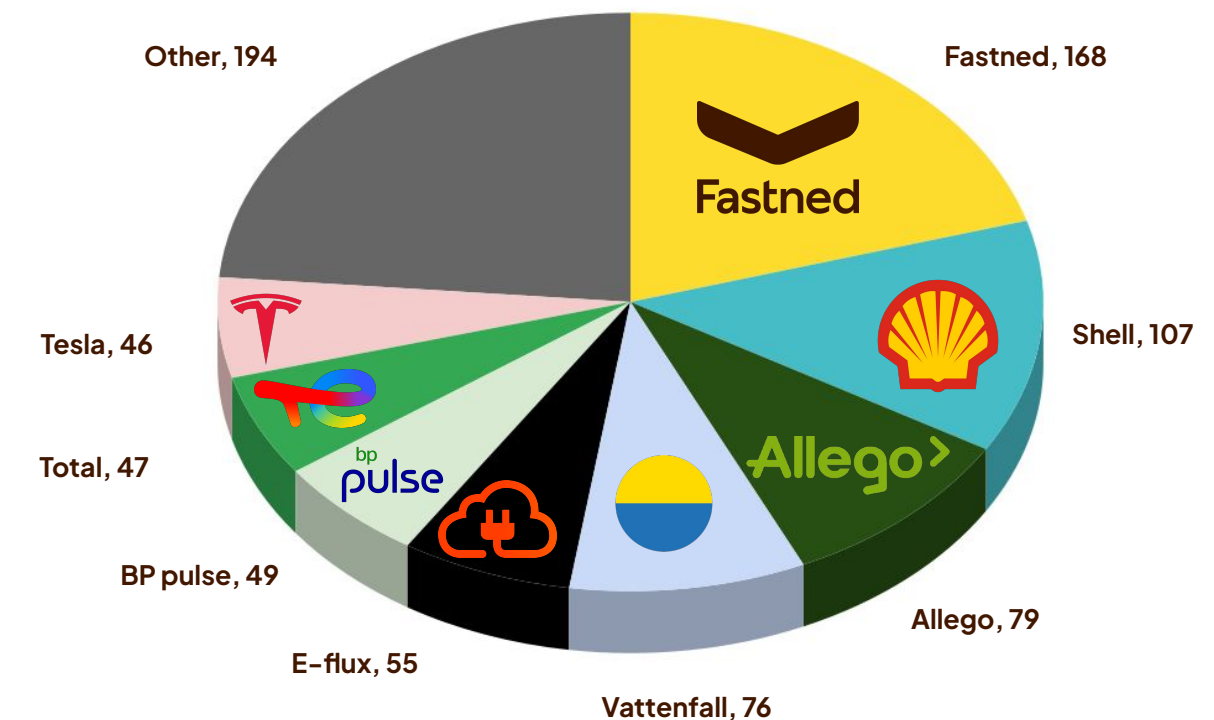
But responsible for nearly 60% of fast charging volume<sup>2</sup>

Meaning Fastned locations do ~5x more sales than other locations

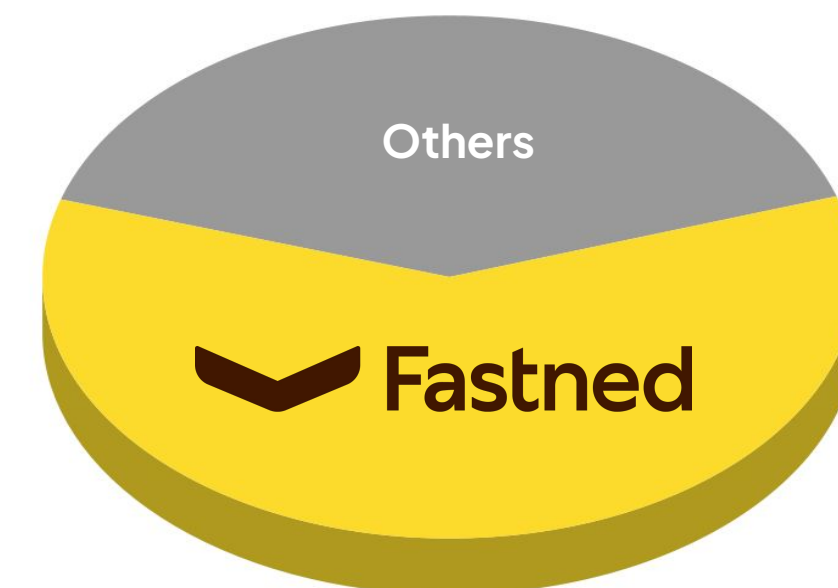
This is driven by high traffic, as well as an excellent customer experience

>90% of Fastned stations on motorways, highest traffic roads in the Netherlands

NL fast charging locations<sup>1</sup>



NL fast charging share<sup>2</sup>







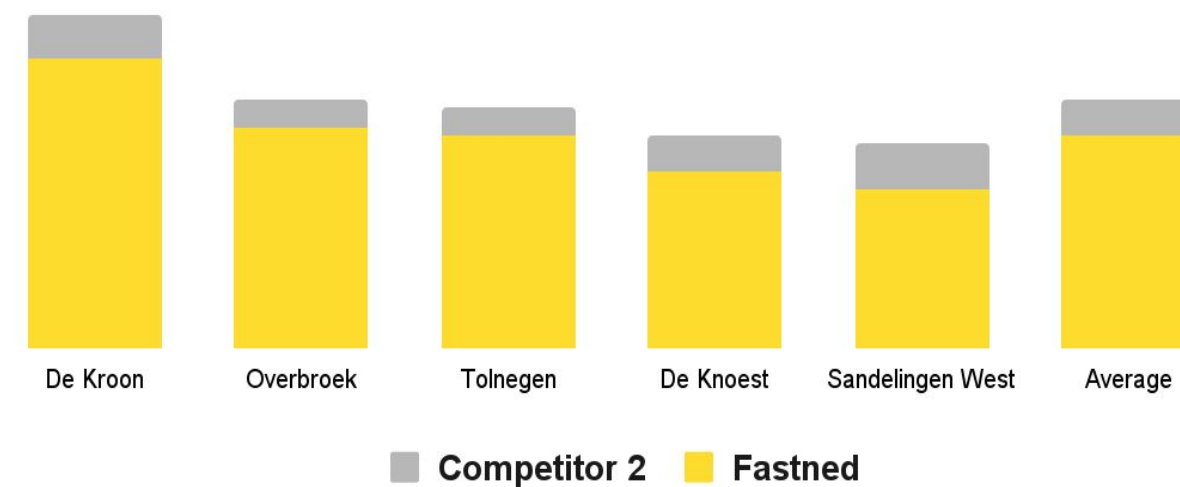
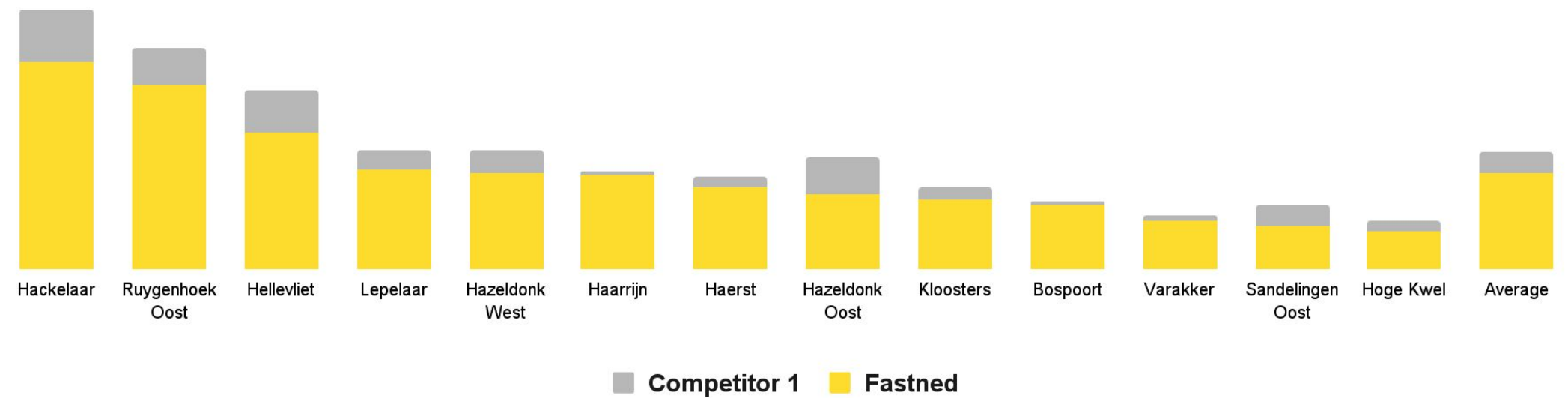
## Outperforming competitors at co-locations<sup>1</sup>

Measured as sessions per day during 2023 at co-locations in the Netherlands

Co-locations are defined as locations where a competitor has fast charging available in the same area as a Fastned station (legacy of current tender regime)

Between Fastned and Competitor 1, Fastned does 82% of the sessions at co-locations

Between Fastned and Competitor 2, Fastned does 85% of the sessions at co-locations



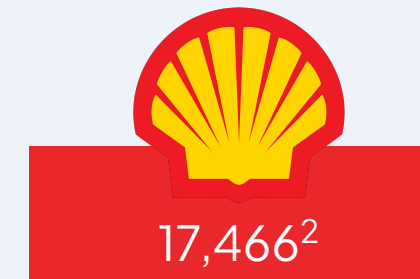
<sup>1</sup>)ACEA – Jul-Aug data

# **Outperforming competitors** at co-locations<sup>1</sup>

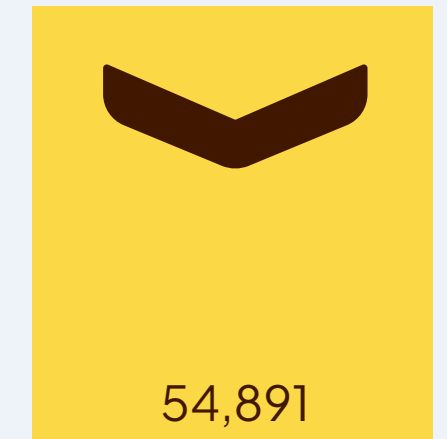


**Case Study:** 3x charging volumes at co-located Hackelaar stations with equal number of charging points

Total number of sessions in 2023



Shell



Fastned



1) Charging Radar. 2) [Shell Recharge LinkedIn](#)





## Charging at motor service areas has as superior business case vs. location charging

Stations on MSAs benefit from a naturally higher demand due to positioning on high traffic roads – resulting in ~3–4x more sessions per day

Because people will charge at MSAs when their battery is low, rather than their fridge being empty, State of Charge (SoC) is expected to be lower, increasing maximum potential session sizes

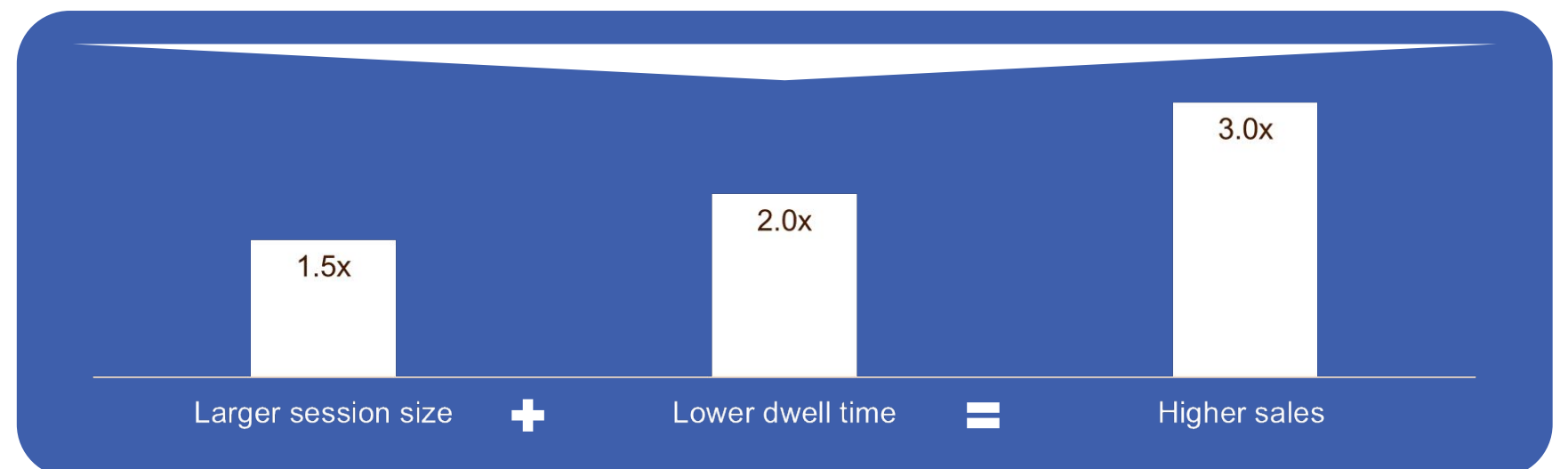
Dwell time behaviour is determined by the location of the charging station

- **Supermarkets** – drivers will occupy a charger until they finish their shopping, regardless of SoC
- **MSAs** – drivers will charge until they reach a sufficient SoC

Notes: 1) Source: Wood Mackenzie. 2) Source: Eurostat, *How much time do we spend shopping?* Min value of Germany, Netherlands, Belgium and United Kingdom. 3) Assuming revenue of €0.50/kWh.

### 2030 business case comparison

|  | MSAs                | Supermarket         |
|--|---------------------|---------------------|
| Daily traffic                          | 30,000              | 1,000               |
| BEV penetration                        | ~20%                | ~20%                |
| Daily BEV traffic                      | 6,000               | 200                 |
| Capture rate                           | 2.5%                | 20%                 |
| <b>Sessions / station / day</b>        | <b>150</b>          | <b>40</b>           |
| State of Charge                        | 25%                 | 50%                 |
| Battery size                           | 69 kWh <sup>1</sup> | 69kWh <sup>1</sup>  |
| <b>Maximum session size</b>            | <b>52 kWh</b>       | <b>35kWh</b>        |
| Dwell time                             | 15 min              | 30 min <sup>2</sup> |
| <b>Maximum session charge speed</b>    | <b>207 kW</b>       | <b>69 kW</b>        |
| Utilisation rate                       | 25%                 | 25%                 |
| Max. annual per charger throughput     | 453 MWh             | 151 MWh             |
| <b>Max. annual per charger revenue</b> | <b>€227k</b>        | <b>€76k</b>         |
| <b>Max. annual per station revenue</b> | <b>€1,417k</b>      | <b>€252k</b>        |





# Appendix E **BEV Market**

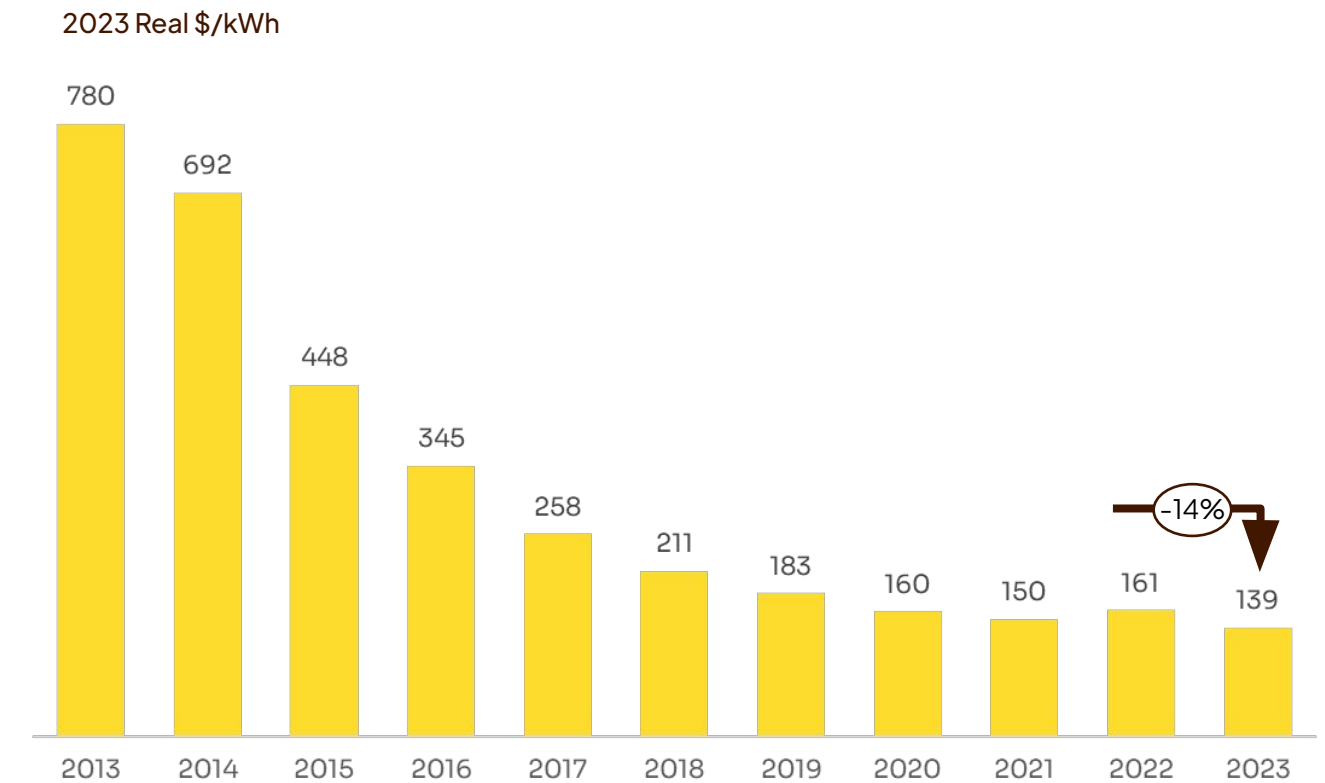




## Long term BEV growth drivers in place

- 1 Government incentives - due to CO2 reduction targets
- 2 Increasing supply of BEVs
- 3 Battery technology advancements
- 4 Growing consumer preference
- 5 Increasing charging speeds & better infrastructure

**Battery prices are continuing to fall** following transitory price increase in 2022<sup>1</sup>...



... **with continued price reduction** expected in 2024



Courtesy of CATL

**CATL, BYD To Slash Battery Prices By 50% In 2024. BOOM! EVs Win!**

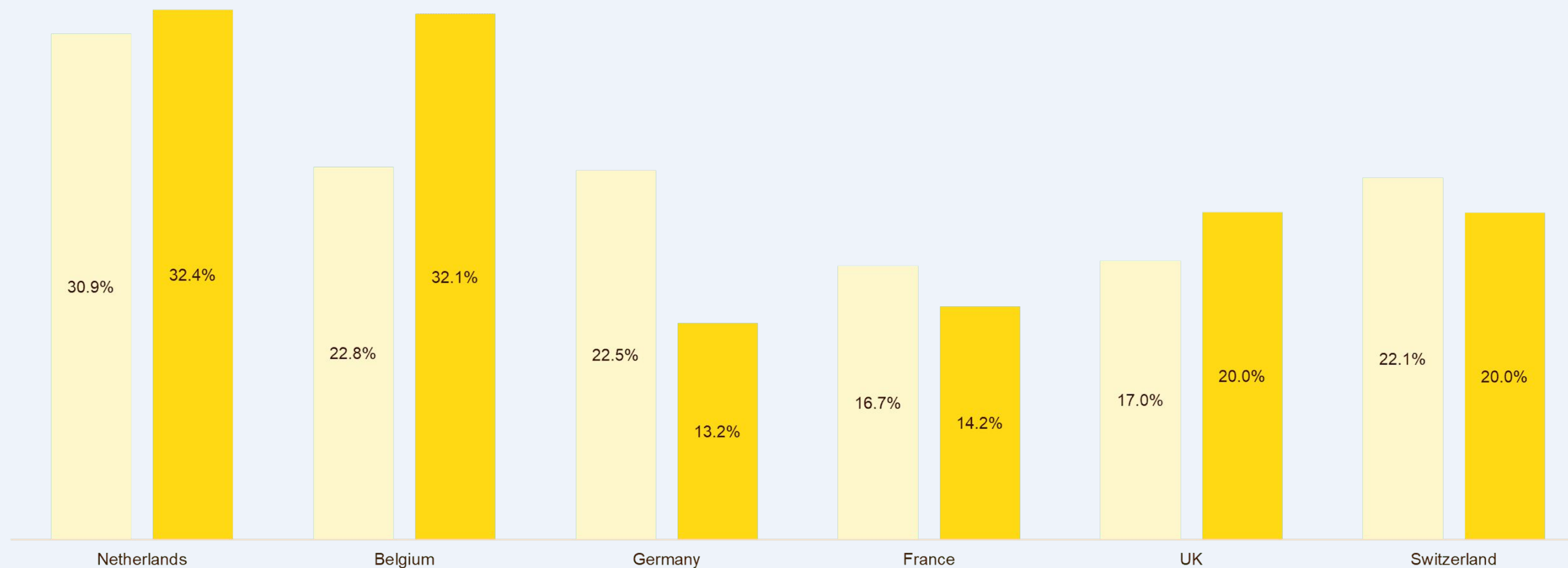
Source: BNEF



## BEV sales in Fastned's key markets

BEVs as a % of total car sales<sup>1</sup>

Q3 2023 Q3 2024





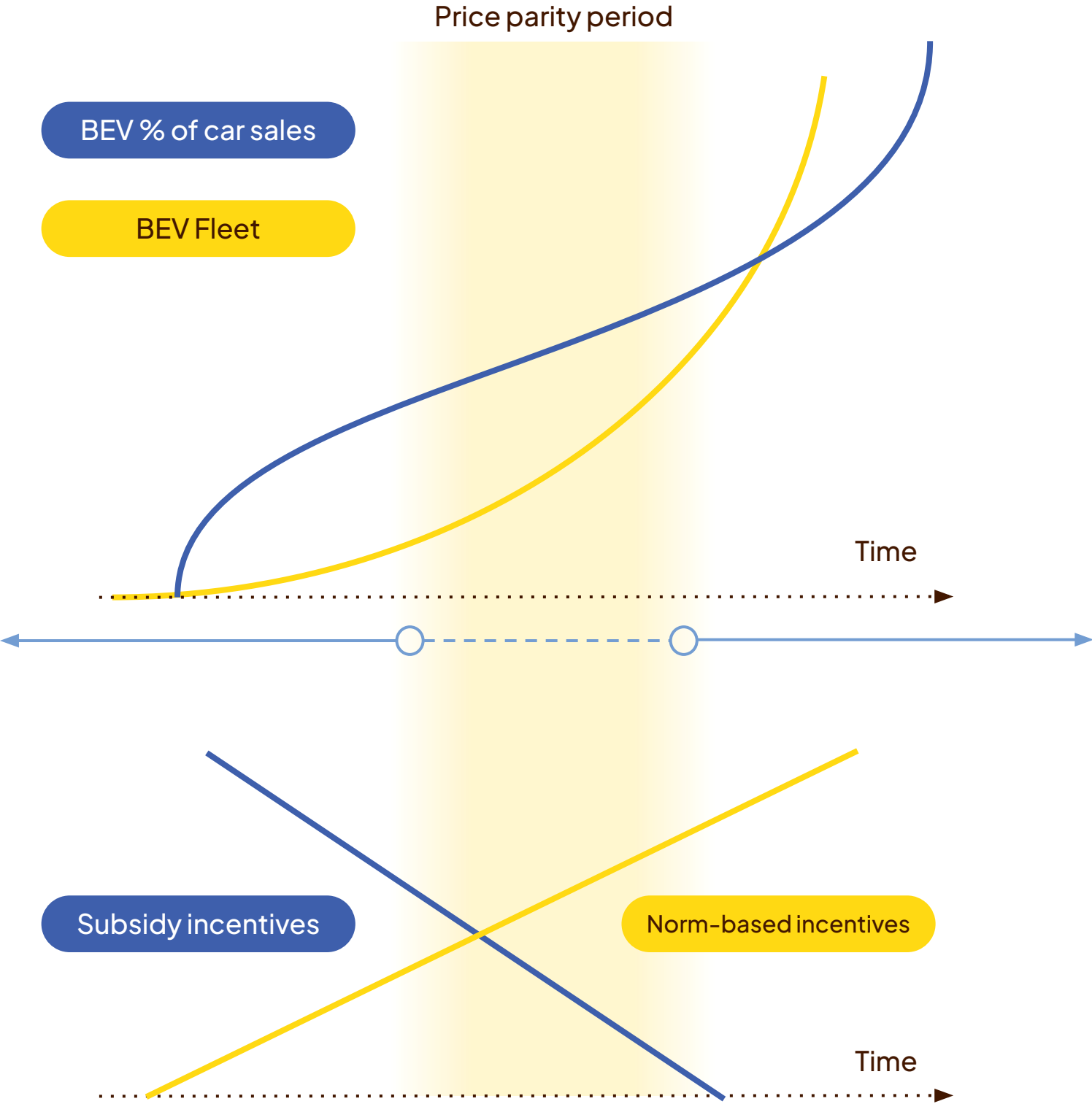


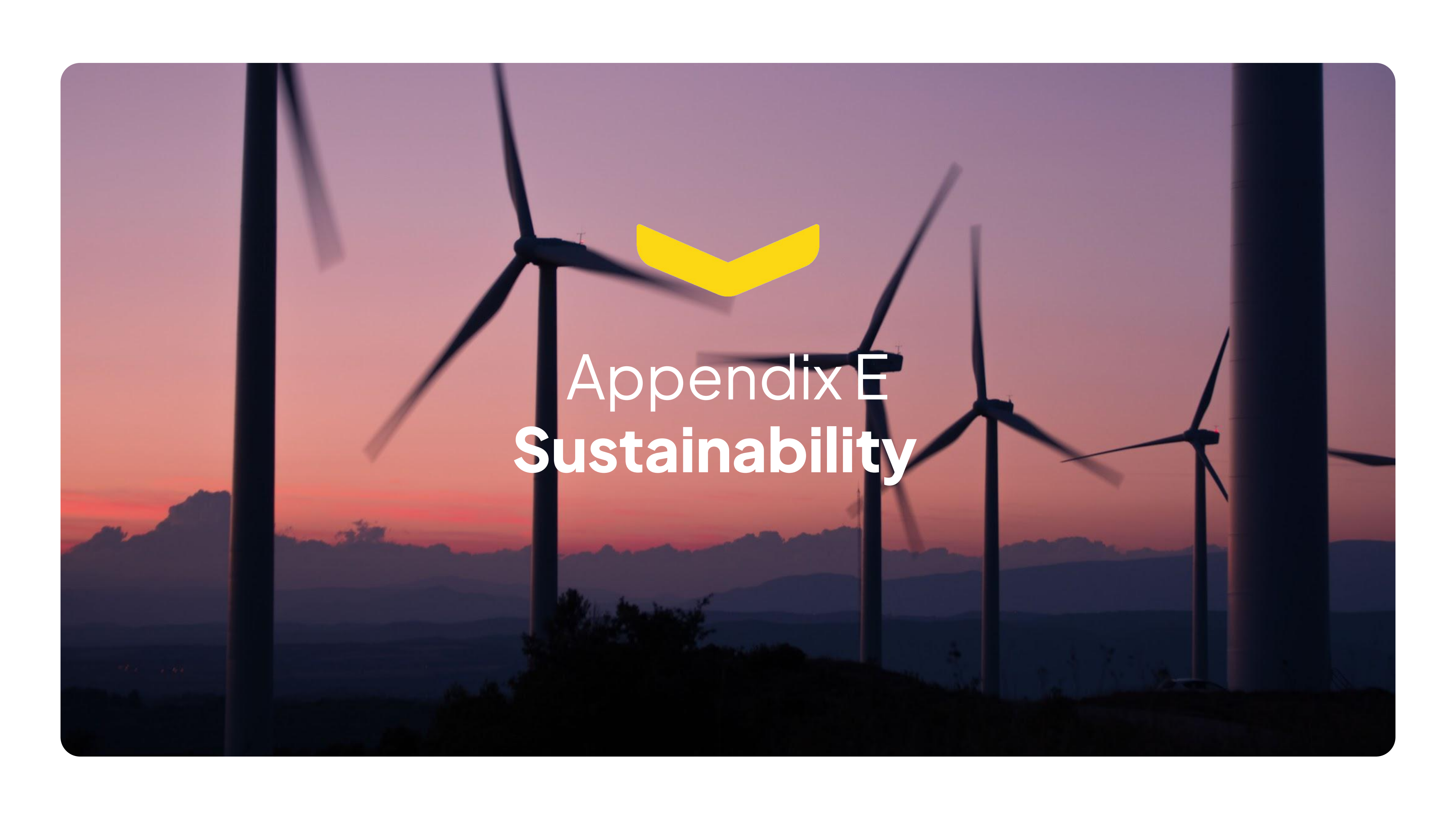
# The twilight zone – in the price parity period

Tesla Model Y €45,000



Renault 5 €25,000





# Appendix E **Sustainability**





## Improving ESG performance through fulfillment of roadmap milestones

- ✓ Adopted UN SDGs in 2022, included in annual report
- ✓ Completed first materiality assessment incorporating “double materiality” concept in Q4 2022
- Working towards integrated reporting, as per CSRD requirements
- Implemented sustainability reporting platform for GRI Standards
- Expect to share a more comprehensive ESG dataset in Fastned’s 2023 Annual Report





# Regulatory compliance, footprint analysis and making a positive impact are the main pillars of our sustainability focus

## Compliance and reporting

- Preparing for CSRD (estimated to be in scope in 2025)
- EU Taxonomy eligibility and alignment
- Follow GRI standards for sustainability reporting
- Selected and implemented a sustainability reporting platform

## Understanding our footprint

- Calculated CO2 footprint data for all Fastned stations based on the life cycle analysis of a standard station in NL
- Calculated and published scope 1, 2 and 3 emissions
- Achieved Level 4 of CO2 Performance Ladder certification
- 2030 CO2 emissions / kWh reduction targets of 80% for scope 1 & 2, 50% for scope 3<sup>1</sup>

## Making a positive impact

- Engage in community outreach initiatives
- Piloted a low-carbon construction project
- Advocate against the use of fossil fuels in the public domain (e.g. signed letter to stop fossil fuel subsidies)

Notes: 1) 2022 as base year





# Appendix E **Future Industries**



COMING IN 2025

# The future of service areas in Europe

- ✓ In Q1 2023, Fastned won first ever fully dedicated service areas tender
- ✓ Fastned was able to prove its concept against multiple competitors
- ✓ Gentbrugge (Belgium) tender gives us a glimpse into the future of service areas
- ✓ Dutch new service areas policy proposal advocates for a similar structure
- ✓ AFIR will accelerate the realization of infrastructure of this size and type across Europe in the coming years







# We are getting ready for all the **electric trucks on the roads**

More and more trucks are coming to the roads



Image source: Hans Hermans, Fastned founder

More and more trucks are coming to the roads







# Fastned

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