



Investor Presentation

October 2026

Fastned's flagship fully electric service area
- Gentbrugge opened in July 2025



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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





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

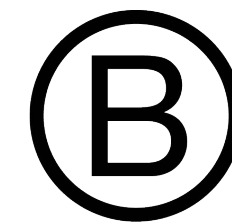


100% local **sun, wind & hydro energy**¹

2025 CO₂e avoided

165,9
kilotonnes

Certified



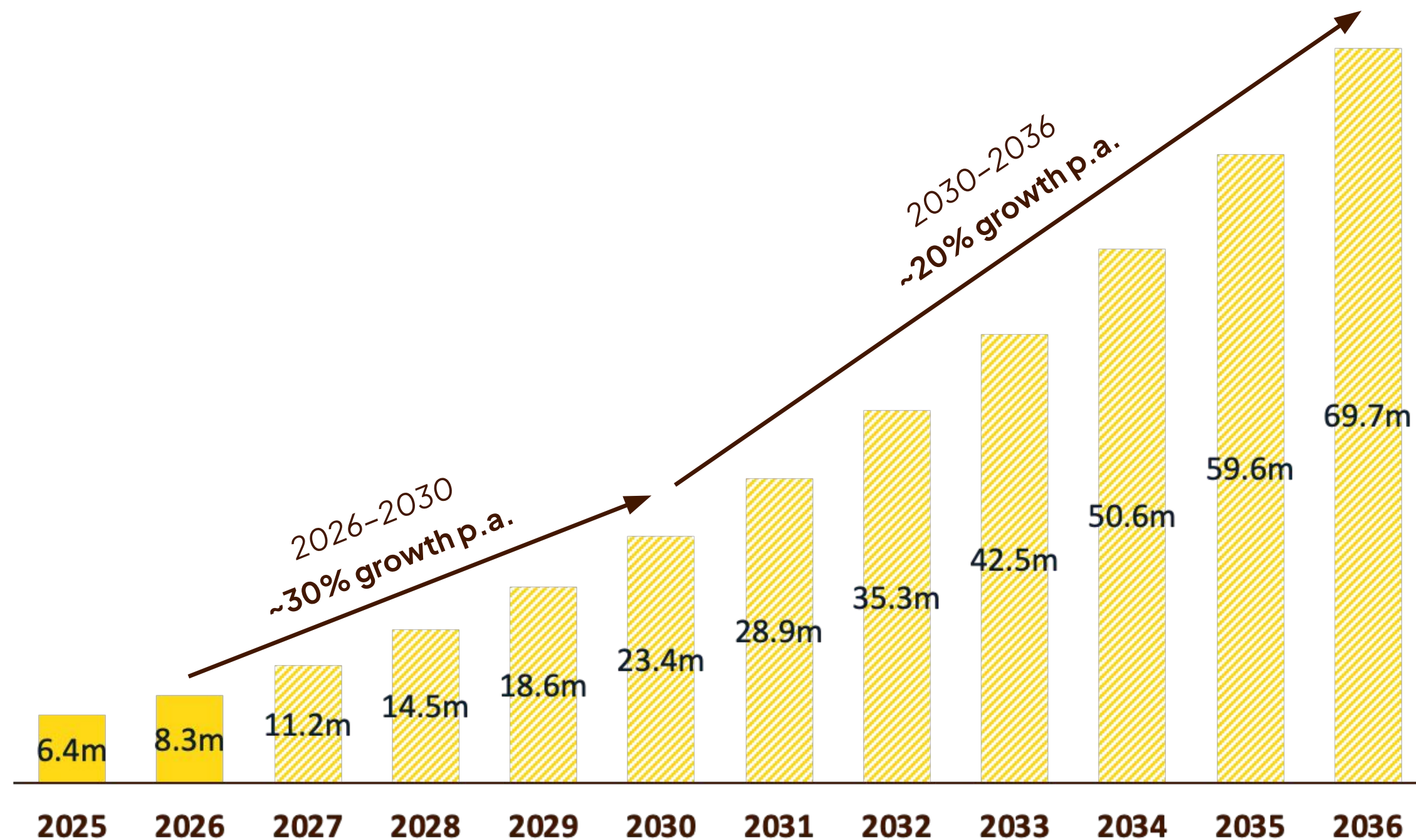
Corporation

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

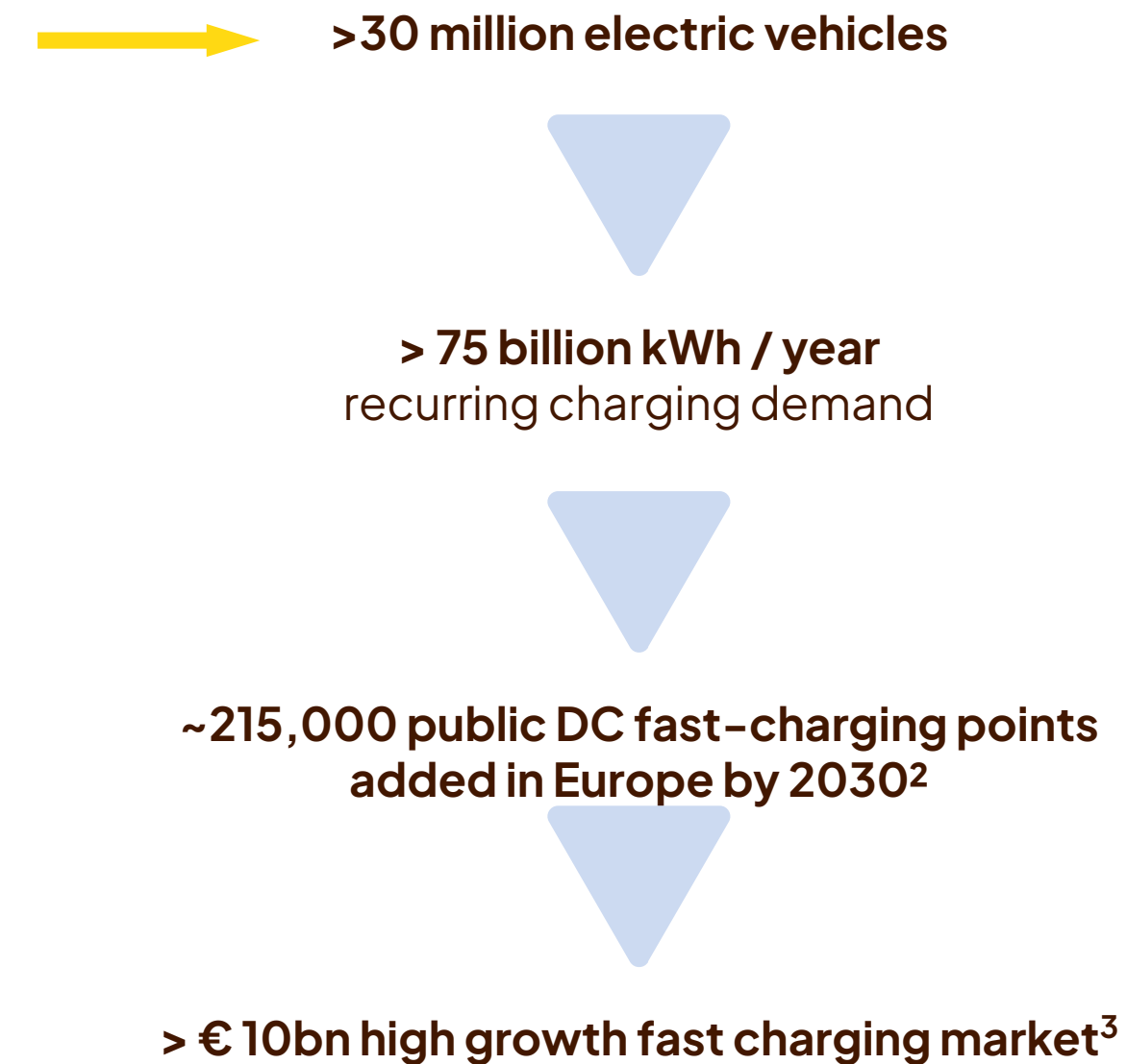


The BEV fleet is scaling: creating a large, high growth fast charging market

BEV fleet in Fastned's operating geographies¹



2030 BEV Charging Market





Fastned ranks among the top three fast charging companies in Western Europe¹

Type

Main location strategy

	Car manufacturer	Off highway (navigational pull)
	Utility	Destination charging
	Car manufacturer	High traffic roads
	Pure play	High traffic roads
	Pure play	Off highway
	Pure play	Destination charging
	Oil major	Adding chargers on petrol stations
	Oil major	Adding chargers on petrol stations
	Utility	Destination charging
	Oil major	Adding chargers on petrol stations

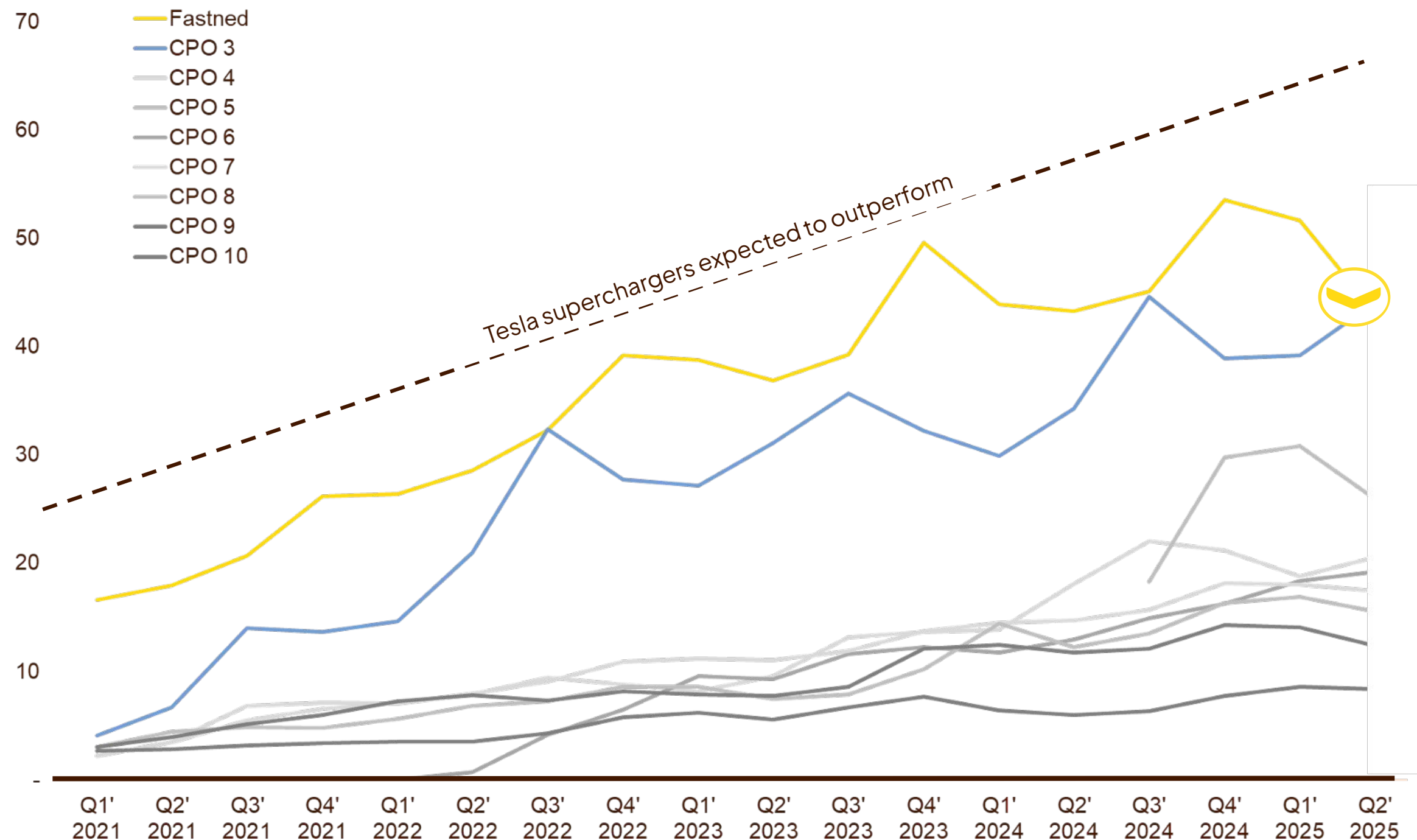
2025 energy volume sold¹

Sources: 1–UK, Netherlands, Belgium, Germany, France, Switzerland. Public data. Fastned analysis, assuming a proxy of sessions to volume sold. Tesla data are estimates



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

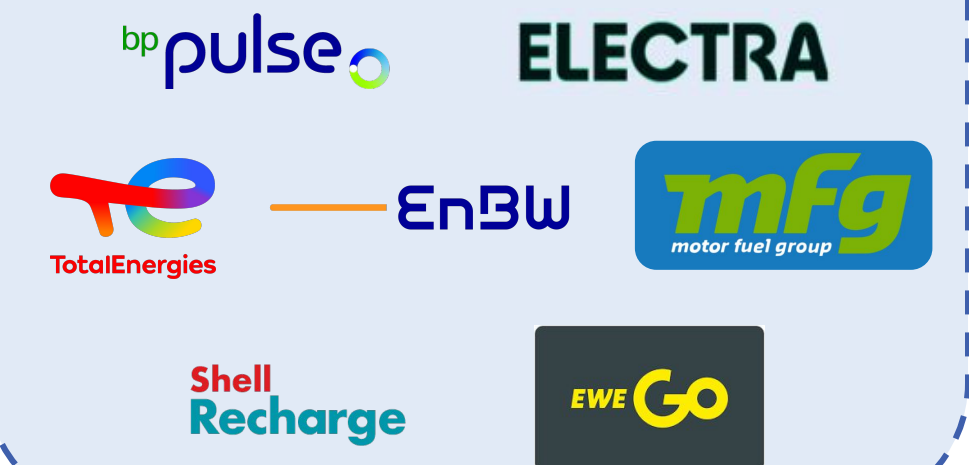
Daily sessions per station¹



High Sales per station



Low Sales per station



¹) Source: Charge Radar, excludes Tesla. Fastned's operating geography – Netherlands, Belgium, Germany, UK, France, Switzerland. Note competitor group excludes Gridserve due to data availability.



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



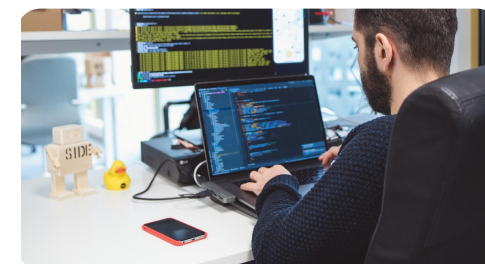
Operations & maintenance



Customer support

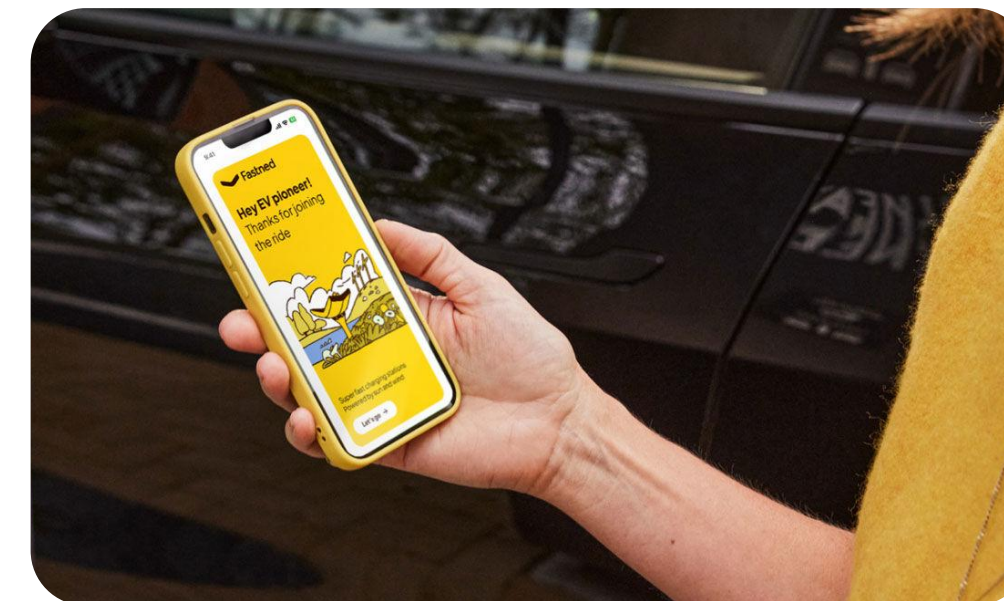


Software backbone & app



3

Best customer experience



99.9%
station uptime

67
customer NPS

Google
4.4 / 5
Google location reviews

AUTOBLOG.NL
#1
charging network



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

AUTOBLOG.NL



Favourite fast charging network survey¹

% 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		



Best EV Charging Network 2025²

5-star rating

TESLA	4.8
	4.4
	4.3
 Fastned	4.2
	3.9
IONITY	3.8
	3.8
INSTAVOLT	3.6
	3.6
	3.5

1) [Autoflow charging network survey 2024](#)
2) [Zapmap best charging networks of 2025](#)



Fastned consistently ranks among the top, thanks to its **reliably strong charging experience**



Best charging networks 2026¹

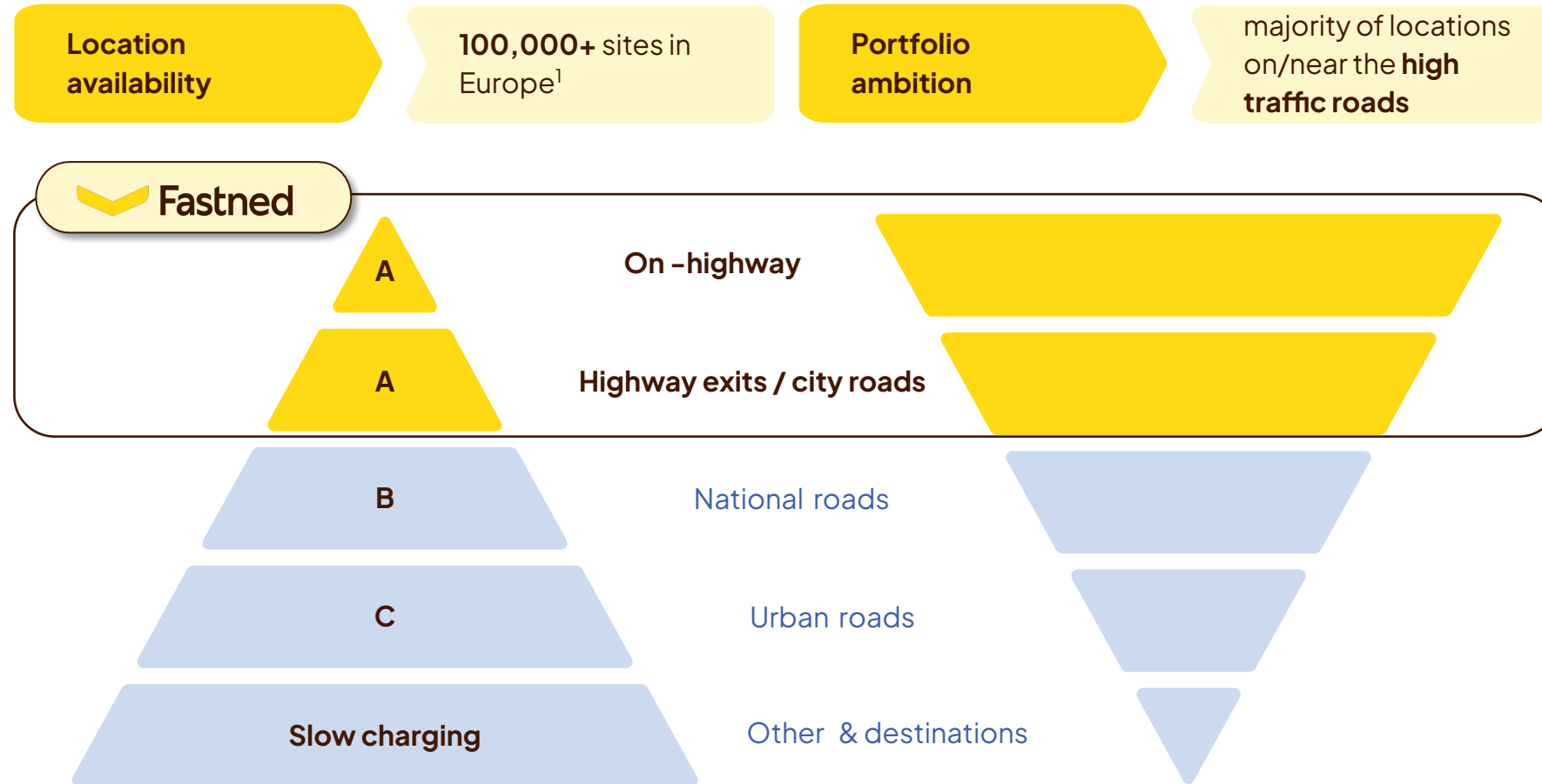
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1) [Chargemap best charging network 2026](#)



Fastned has a proven location strategy with top quality portfolio based on long-term vision...

Fastned focuses on high-traffic A-locations

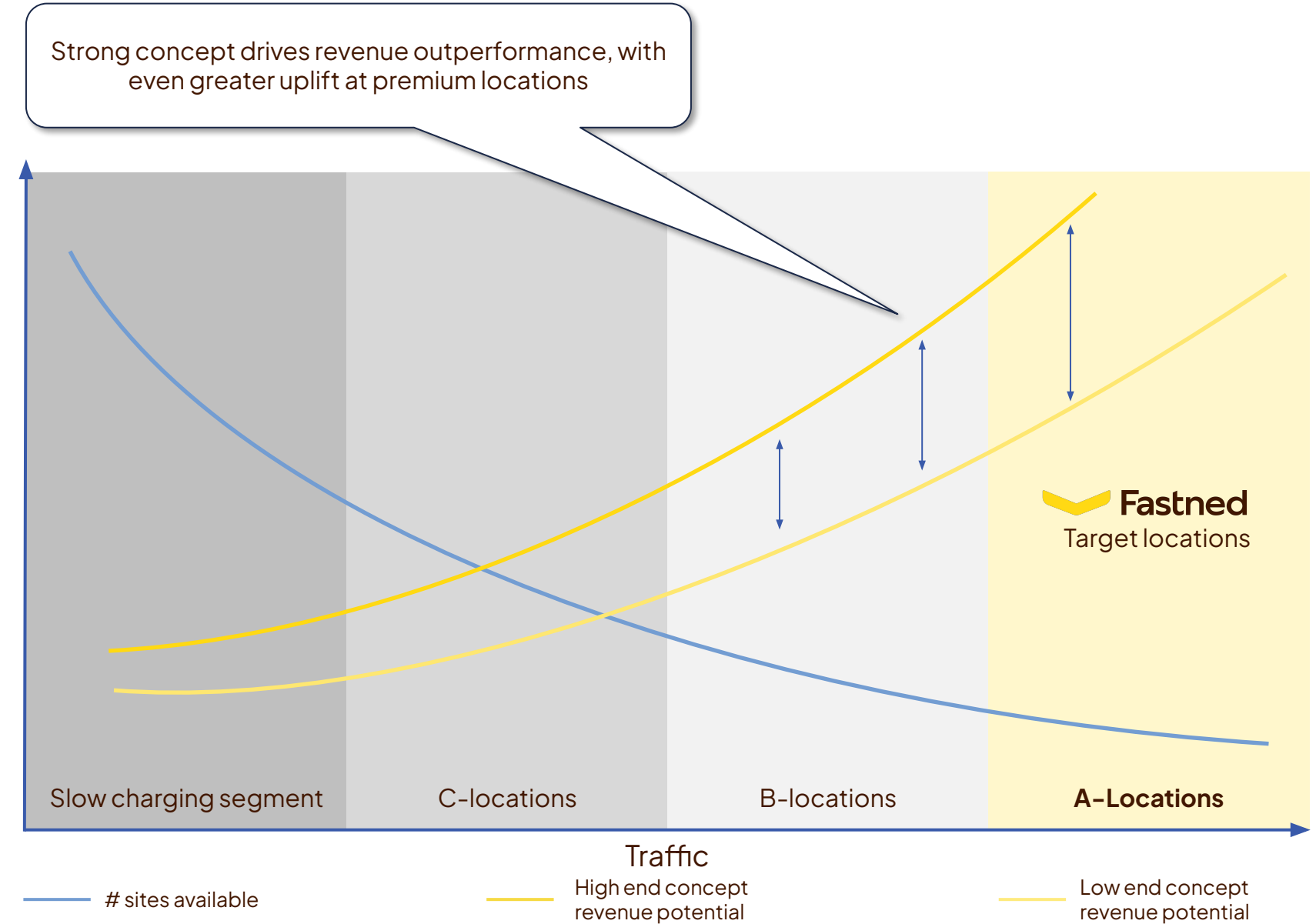


Fastned strengthens its strategic position by:

- Targeting high-traffic A-locations with strong visibility and revenue potential, based on the strong belief that having the best locations drives energy sales, not the # of Charge Points
- Being HPC focused and characterized by limited competition ensuring high usage rate and long lease duration
- Having a top-quality portfolio with a proven site identification approach, based on long-term vision

Note: 1. 10,000+ with a great business case

Location strategy leads to highest revenue potential





Station economics **continue to improve**

€k	Average station Q3 2026	Average station Q3 2025
Average daily traffic	~30k	~30k
BEV fleet penetration	~7.3% ¹	~5.7% ¹
Average # of chargers	6.6	6.4
Sessions per day	57	49
Average MWh (Annualised)	596 MWh	495 MWh
Annualised revenue / station	412 ²	333
Gross margin	326 (€0.55/kWh)	269 (€0.54/kWh)
Operating costs per station	137 ³	144 ⁴
Operational EBITDA (B)	189 (46%)	124 (37%)
Initial investment (A) ⁵	991	892
ROIC (= B / A)	19%	14%
Time-based utilisation rate ⁶	13.5%	12.2%
ROIC at 30% utilisation, current charge speed	>40%	>40%

Results

Station sales continued to grow with energy delivered per average station in Q3 increasing by 21% YoY.

Organic sales growth for Q3 2026 (excl. new stations that are in ramp up) was 27.2%, compared to BEV fleet growth of 29%⁷.

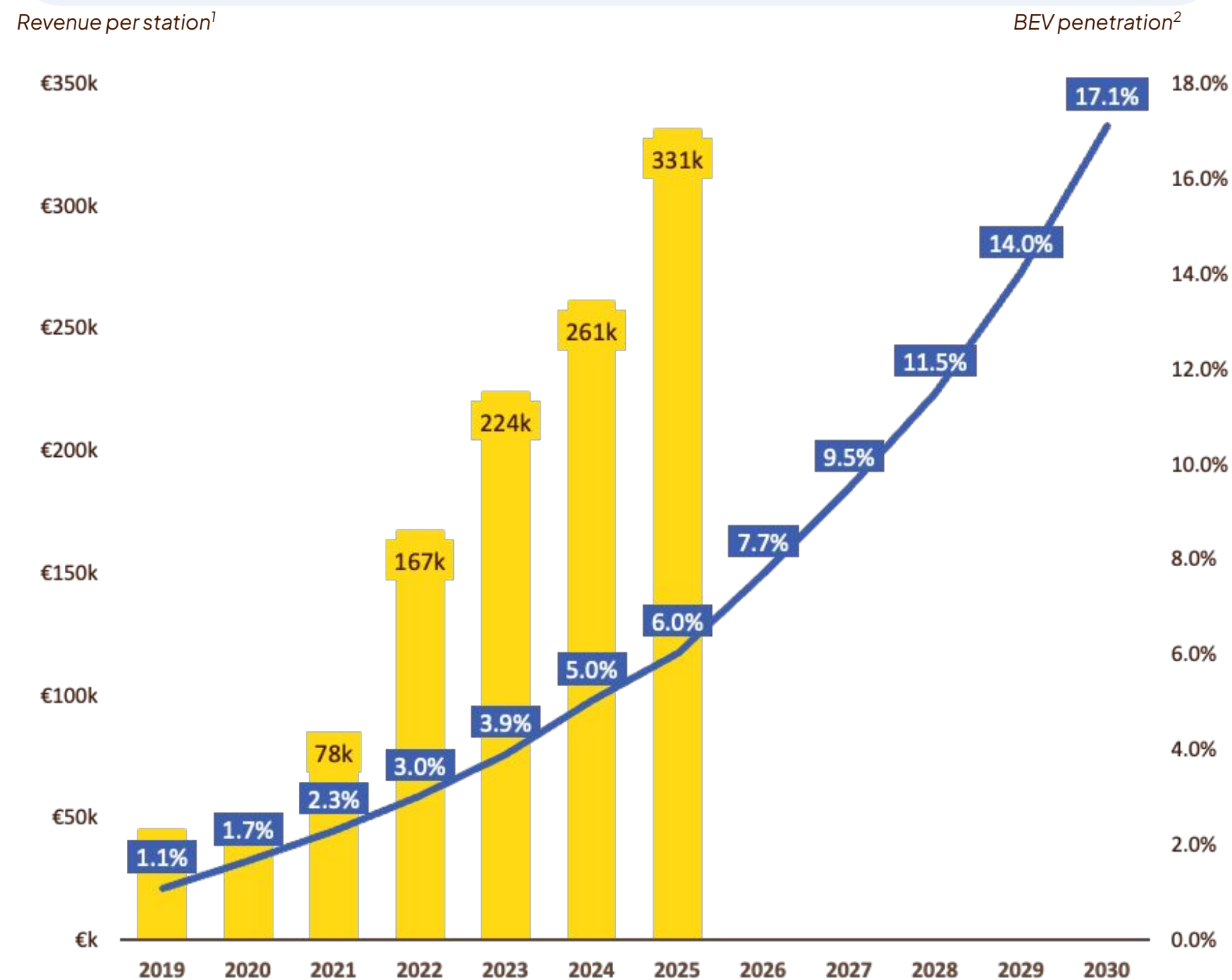
Operating costs per station have normalised in line with the organisation scaling and opex being optimised

Note: 1) Average across Fastned countries, weighted by the number of stations in each country, 2) Annualised revenue related to charging for the period. This figure excludes €5.1m in E-credit revenue included in the official reporting revenue figure due to a delay in the e-credit settlement platform. See appendix for more details. This figure also includes revenue from Places for London JV sites which are not included in IFRS revenue related to charging 3) based on €20.8k per charger for H1 26 4) based on €22.6k per charger for full year 2025, 5) Non-depreciated PP&E relating to charging stations, including Right of Use assets. Q3 2025 and 2026 figures are as at 30 September 2025 and 2026 respectively. 6) Time-based utilisation calculated as = (average session duration (hrs) * average sessions per day) / (number of chargers * 24 hours). 7) Station weighted fleet growth for Fastned's operating markets.

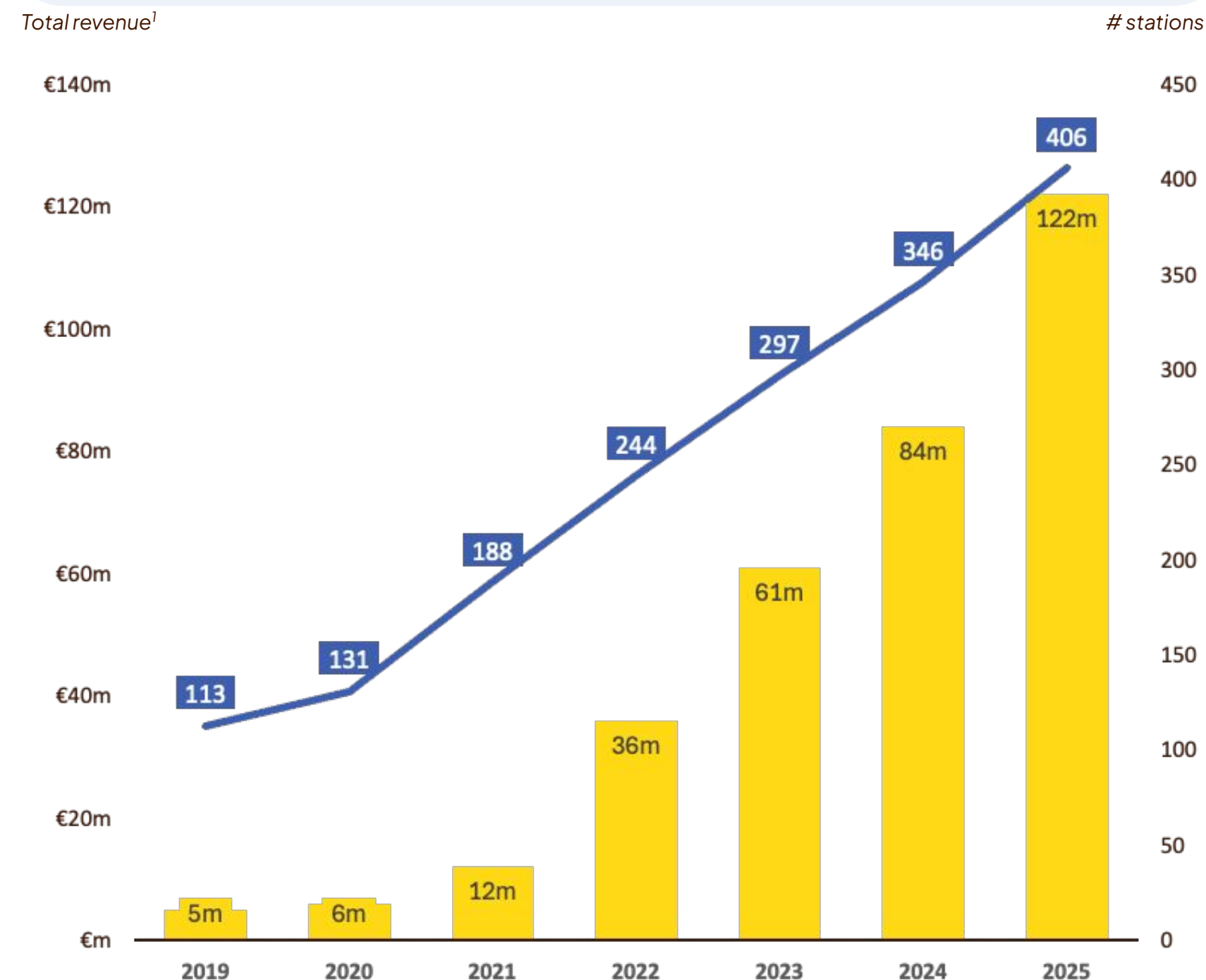


Fastned's top line has grown considerably – driven organically by BEV adoption and inorganically by building new stations

Organic growth through high traffic locations & BEV penetration growth



Additional (inorganic) growth by adding new stations to the charging network



¹) Only includes revenue relating to charging. 2020–2022 revenues impacted by reduced mobility due to Covid
²) Station-weighted BEV penetration.

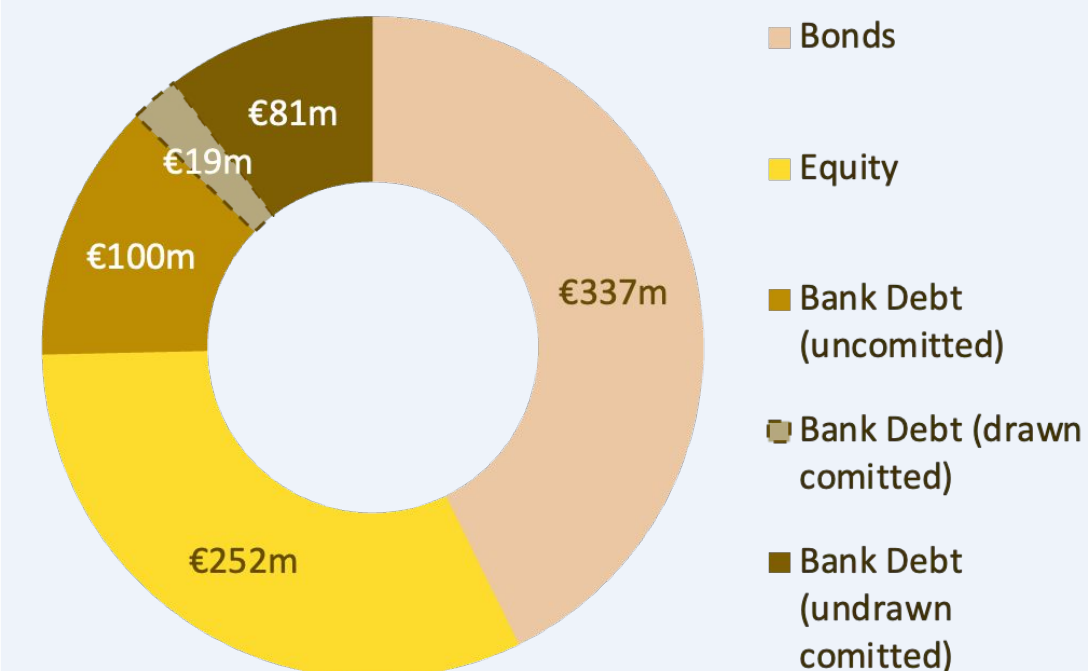


Retail bond and bank financing platforms to continue to fund the 2027 rollout

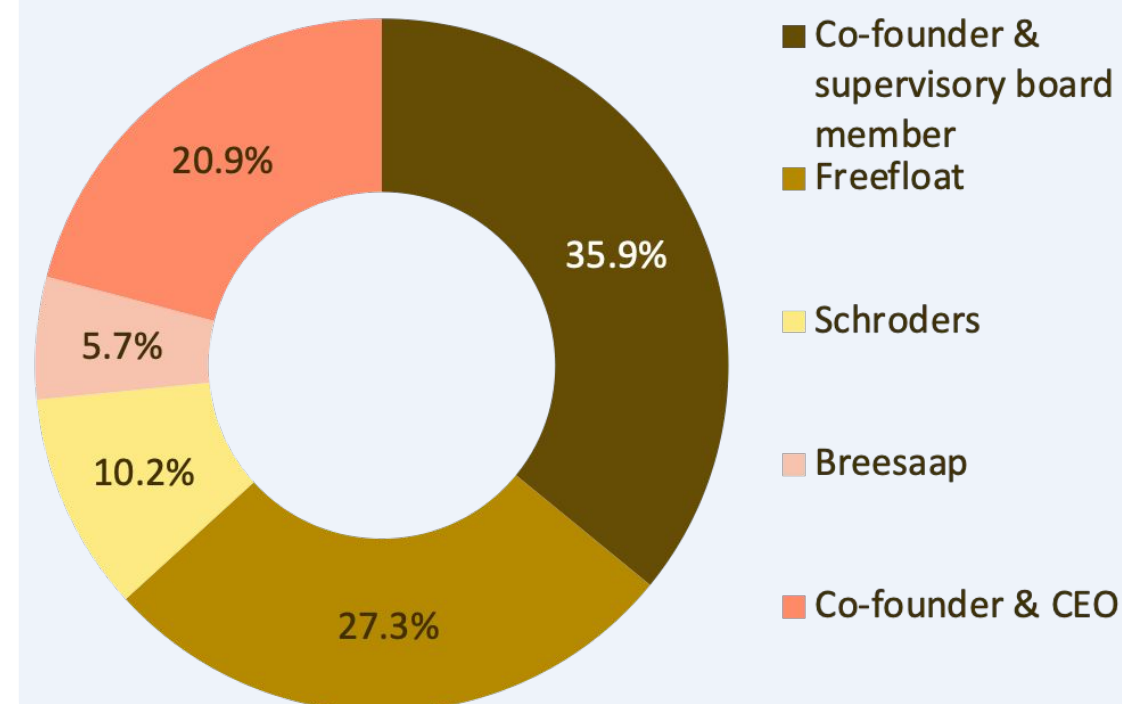
Funding to date:

- ✓ **Equity platform:** ~€ 250 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
- ✓ **Retail bond platform:** >€ 337 million in retail bond funding
- ✓ **Cash level:** Current cash level of c. €82.4m (September 2026)
- ✓ **Bank Financing:** €200m in limited recourse debt for Belgium and Switzerland (€100m committed + €100m uncommitted accordion). ~€19 million has been drawn to date.

Current funding



Shareholding structure





Fastned bond portfolio overview

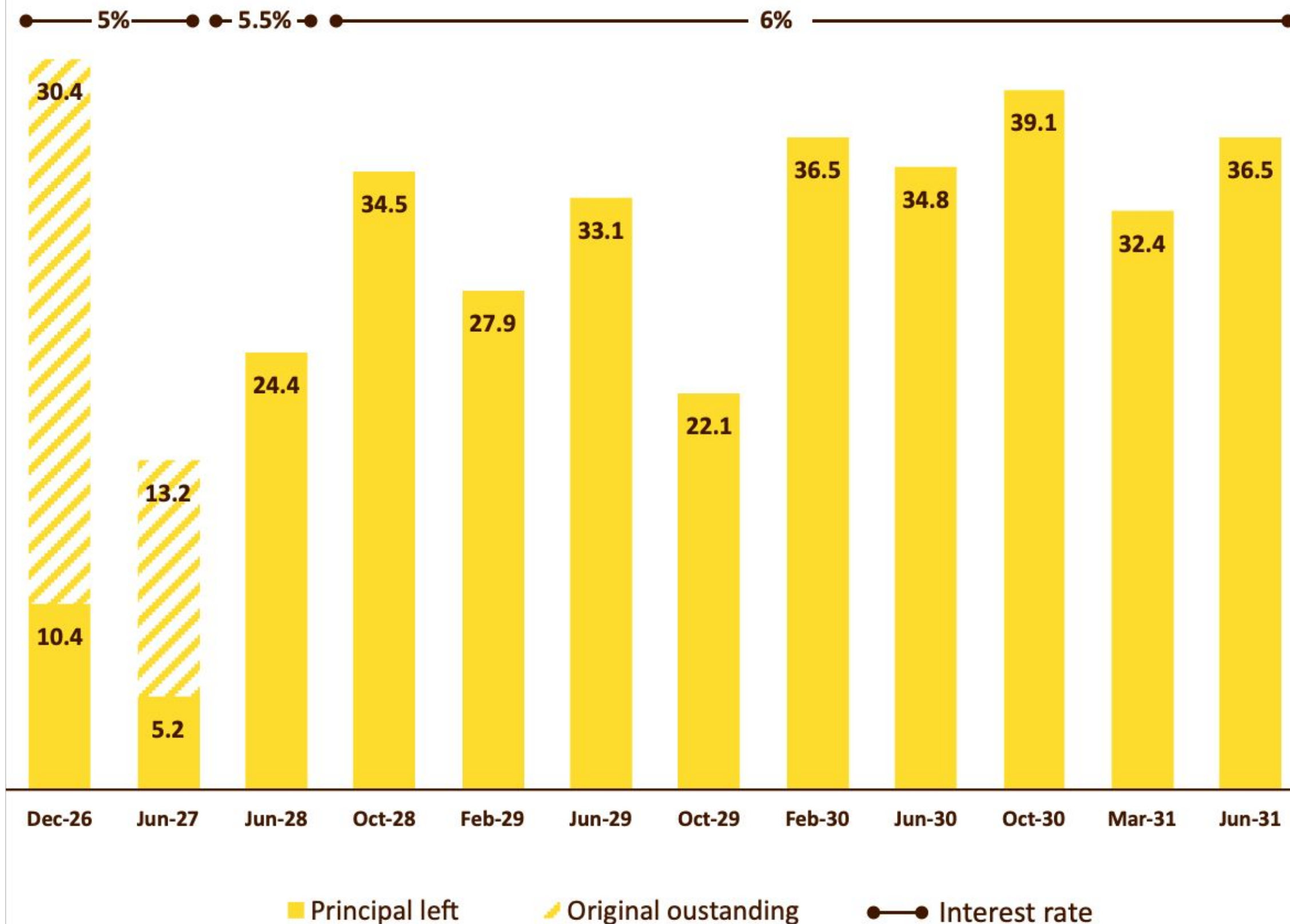
Funding:

- **€69m** raised in 2026
- **€337m** outstanding as of September 2026
- **Covenant free** funding of our network expansion

Investor base & issuance

- **3** issuance rounds per year
- Investor pool of **12,000+**, adding on average **~800** new investors per new issue
- **>50%** of maturities extended by existing investors

Outstanding bond overview (€ million)



Project Tico: adding another funding pillar for Belgium & Switzerland to support growth in 2026 and beyond

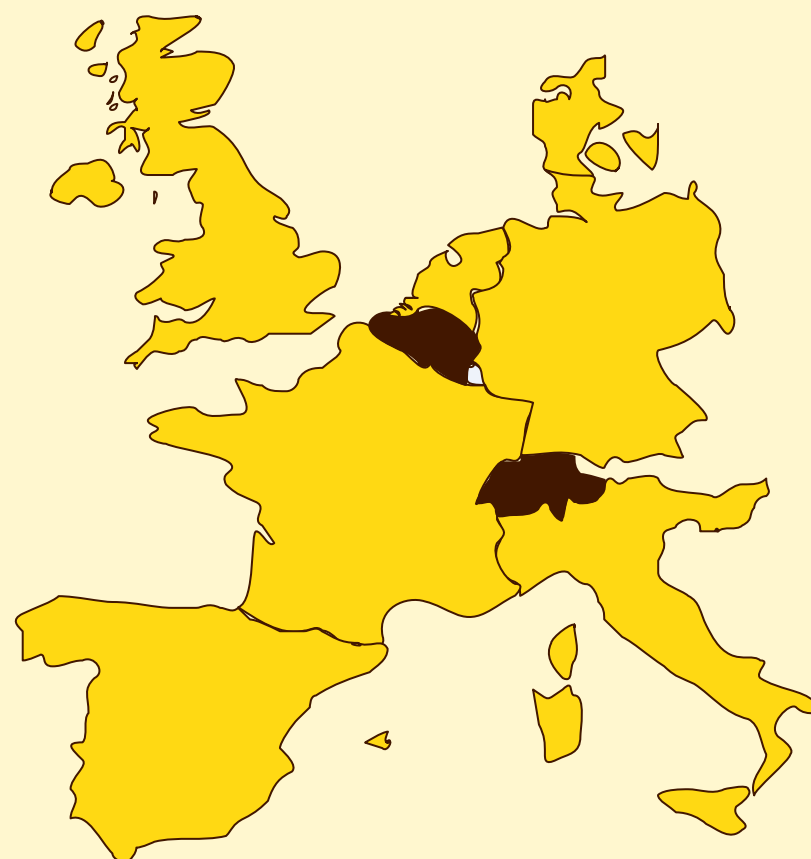
Facility



In January 2026 Fastned closed a €200m limited recourse, green loan facility, **adding first institutional debt to the funding mix.**

- ✓ €100m committed + €100m uncommitted accordion facility for expansion in other markets
- ✓ All-in rate lower than the retail bonds
- ✓ 3 year availability period
- ✓ Bank financing of this nature has become available to CPOs who have a strong business case and competitive positioning in the market
- ✓ The rigorous diligence process required and confidence of infrastructure lenders is a stamp of approval on Fastned's future growth

■ Tico perimeter ■ Other active markets



Syndicate





Guidance & outlook

2026

Network

- 70–100 new stations in 2026 (476 to 506 stations operational)
- Target of 1,000 stations before 2030

Financial

- Revenue / station €350–400k in 2026
- Operational EBITDA margin ~45% in 2026¹

1) Before (positive) EBITDA impact from the German highway tender



Business update

Q3 2026 Highlights

+63% YoY

€51.3m

Revenues related to charging¹

+43% YoY

67GWh

Energy Delivered

+39% YoY

2.3m

Sessions handled

+43% YoY

60.7kt

CO₂e avoided

+44% YoY

€37m

(€0.55/kWh)

Gross profit

451

Operational stations

+30 YoY

+26

High traffic locations signed²

€82.4m

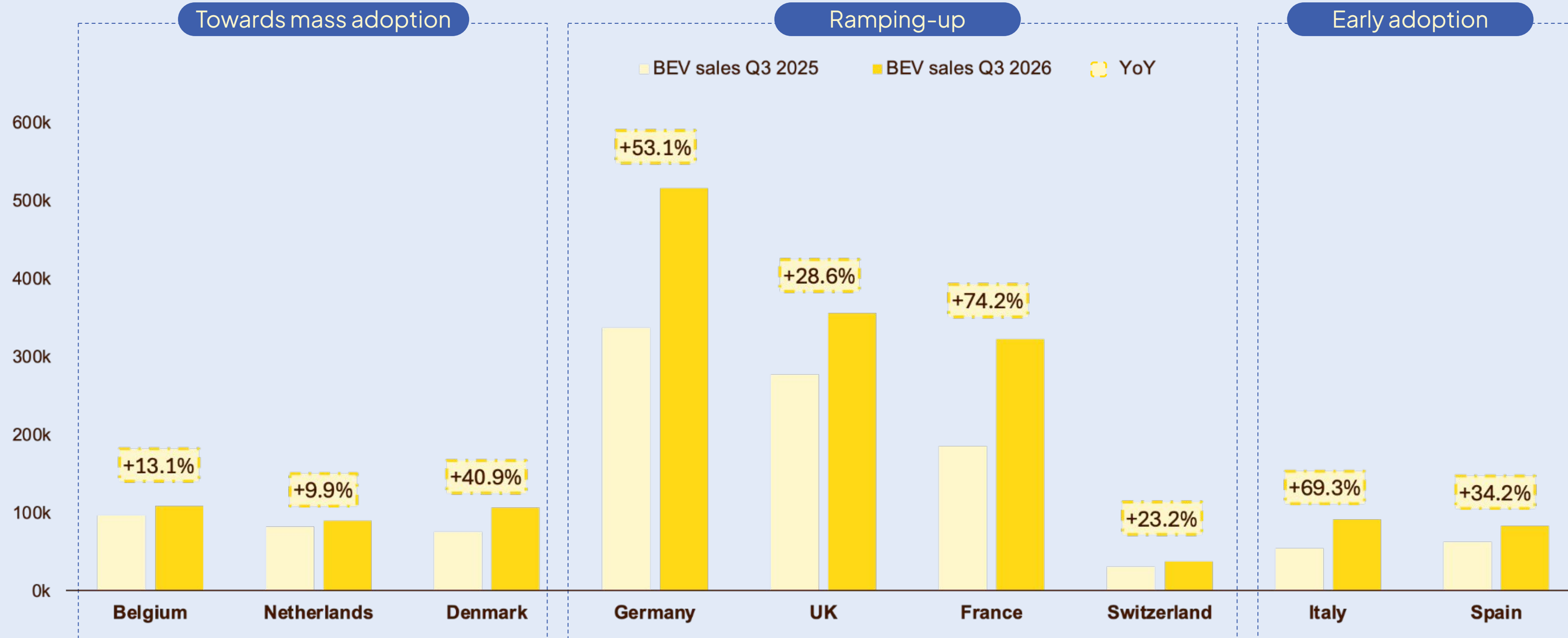
Cash position

Note: All Q3 figures are unaudited and may be subject to change. 1) Includes carryover Dutch e-credits impact from Q1 2026, for more details refer to Appendix 2) 4 locations under development were discontinued during the quarter



BEV sales growth accelerates across Europe in Q3 2026

Battery electric vehicle sales growth Q3 2026 vs. Q3 2025



BEV penetration¹

9.5%

8.4%

23.7%

5.2%

6.1%

4.8%

6.0%

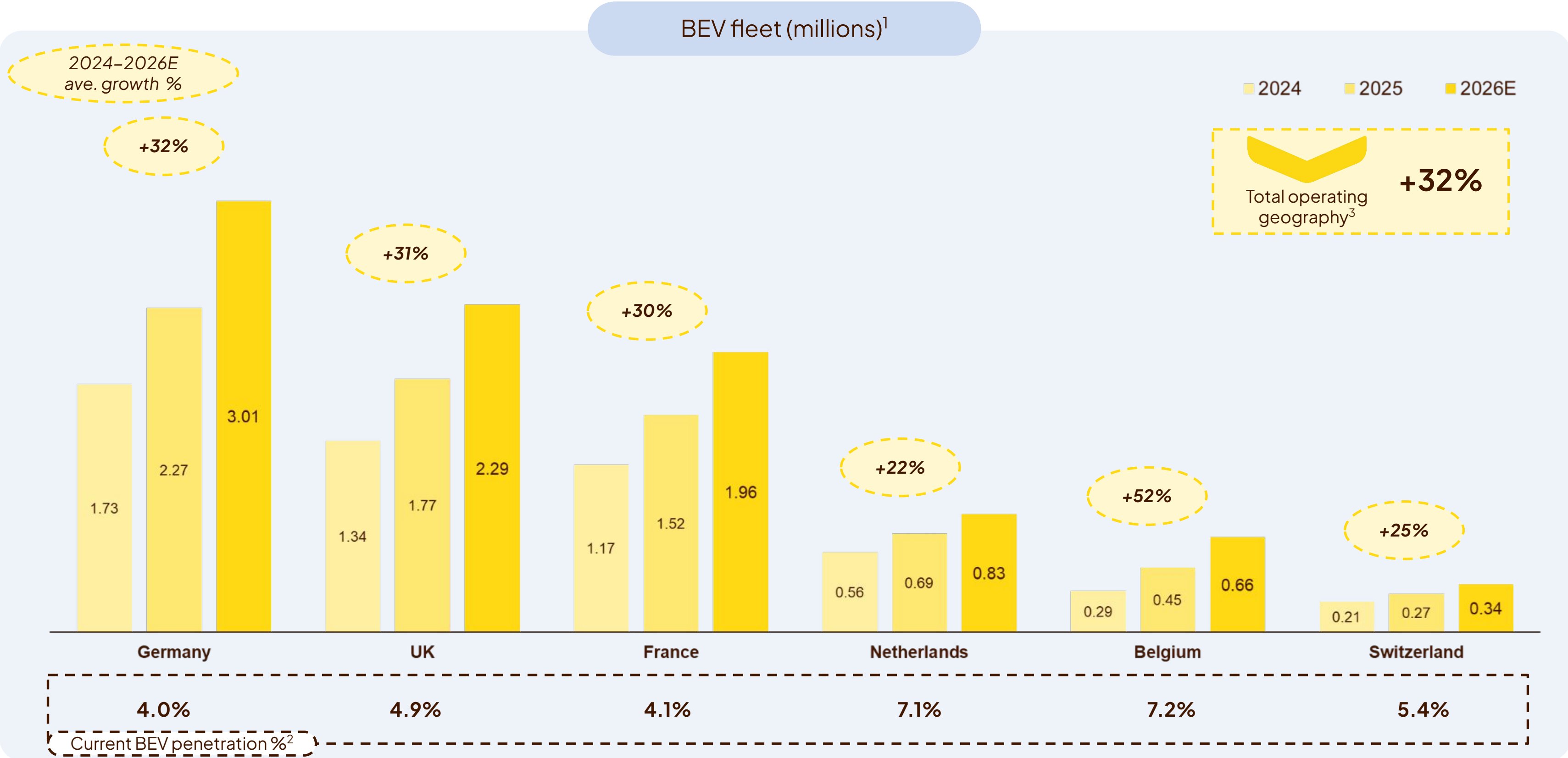
1.1%

1.3%

Source: European Automobile Manufacturers' Association (ACEA). 1) BEV penetration and sales data for Q3 2026, excluding September 2026 data.



Leading to considerable increases in BEV fleet across our key markets



1) Source: Schmidt Automotive Research. 2) ACEA data as at November 2025. 3) Includes short and long term targets such as Poland, Austria & Ireland.



Appendix A **Management & Leadership**



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



More than 400 people driving Fastned's
mission across **9 countries**



Michiel Langezaal

CEO & Founder

Previously: AT Kearney, Epyon power, ABB



Caroline Hoefsloot

Director Marketing & Communications

Previously: Proctor & Gamble



Victor van Dijk

VP of Strategy

Previously: ING



Georg Schmidt-Holtmann

Director Construction Management

Previously: AGCO



Françoise 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

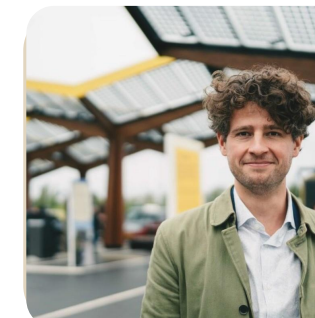
Previously: Philips, Swapfiets, Sanoma



Matt Ersin

Director Government & Public Affairs

Previously: Euromed



Albert den Boogert

Director of Growth

Previously: BCG



Appendix B **Network & Pipeline**



Q3 2026: 450+ operational stations across 9 geographies

451

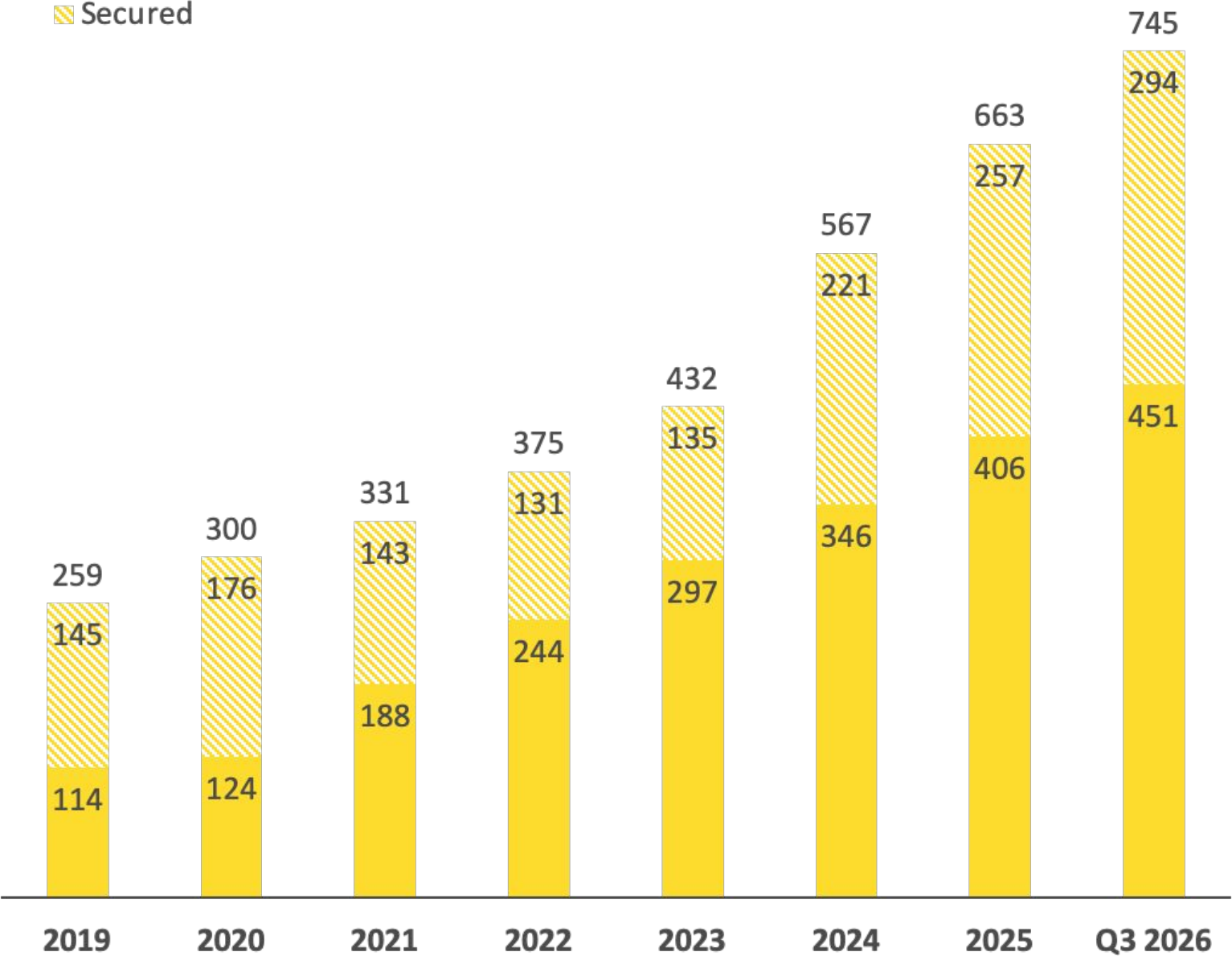
Stations in operation

745¹

Total secured locations

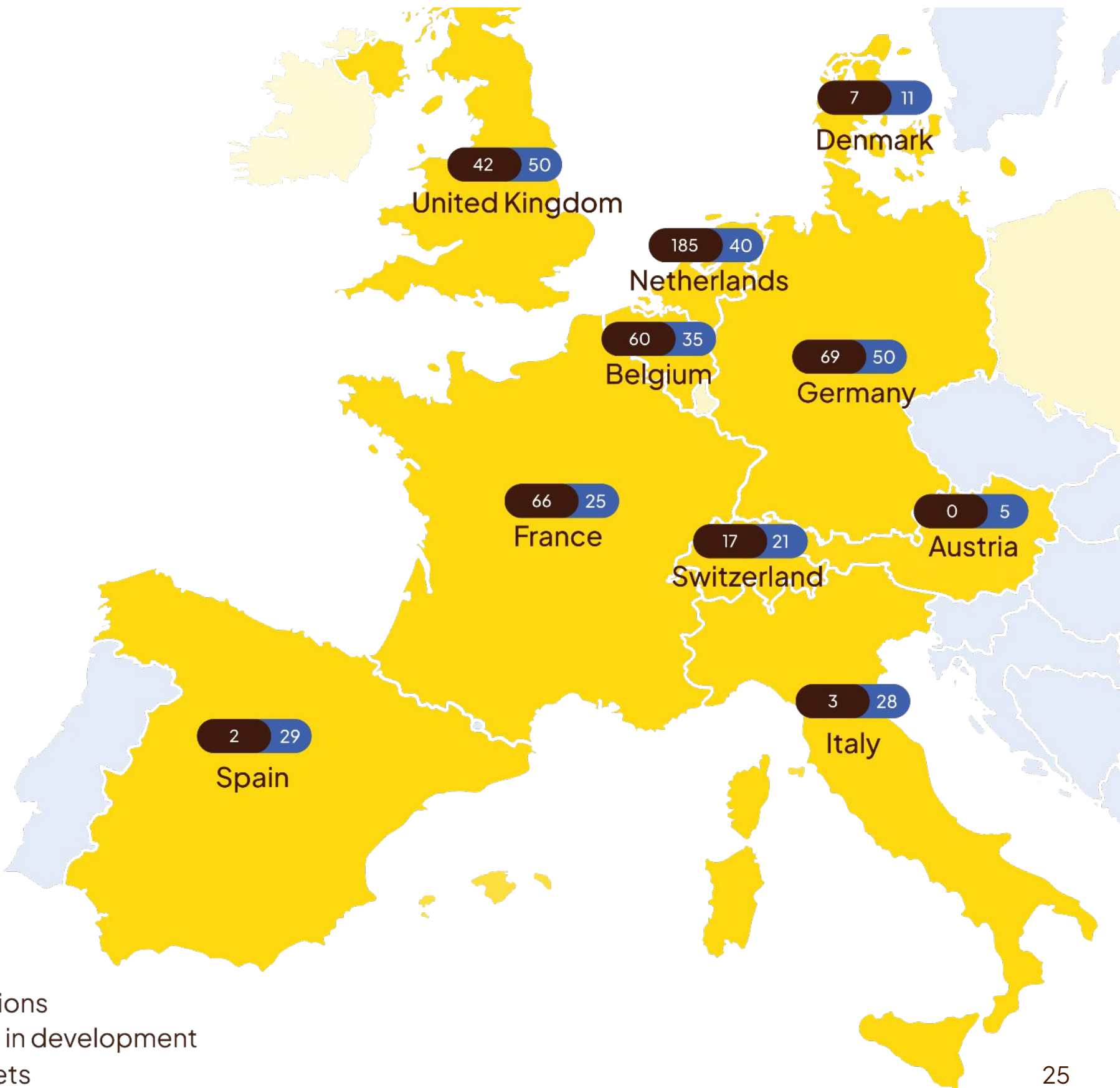
Historical station pipeline

- Operational
- Secured



1) 4 projects (4 sites) were discontinued during Q3 2026.

- 451 Open stations
- 294 Locations in development
- 2 Target markets

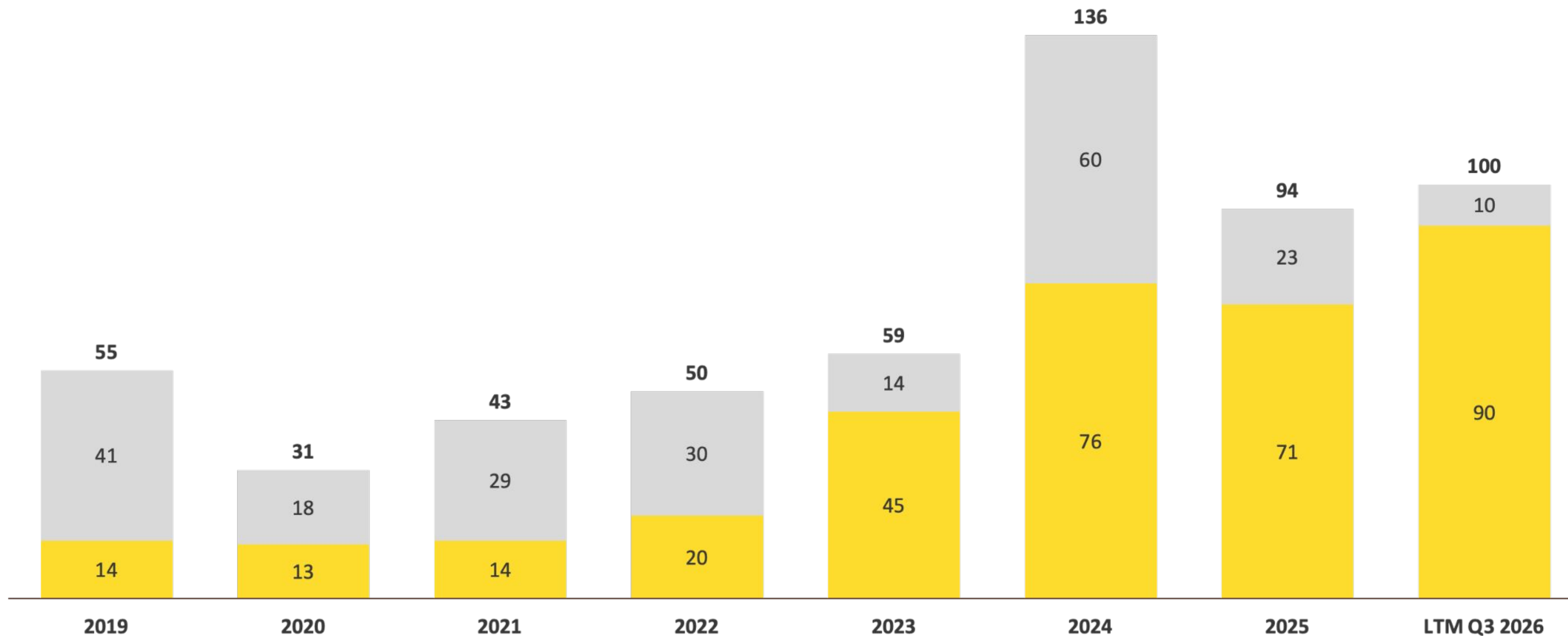




Network expansion capabilities **continue to deliver**, with **strong site acquisition pace** year to date.

■ Private ■ Public

Sites secured on private and public land

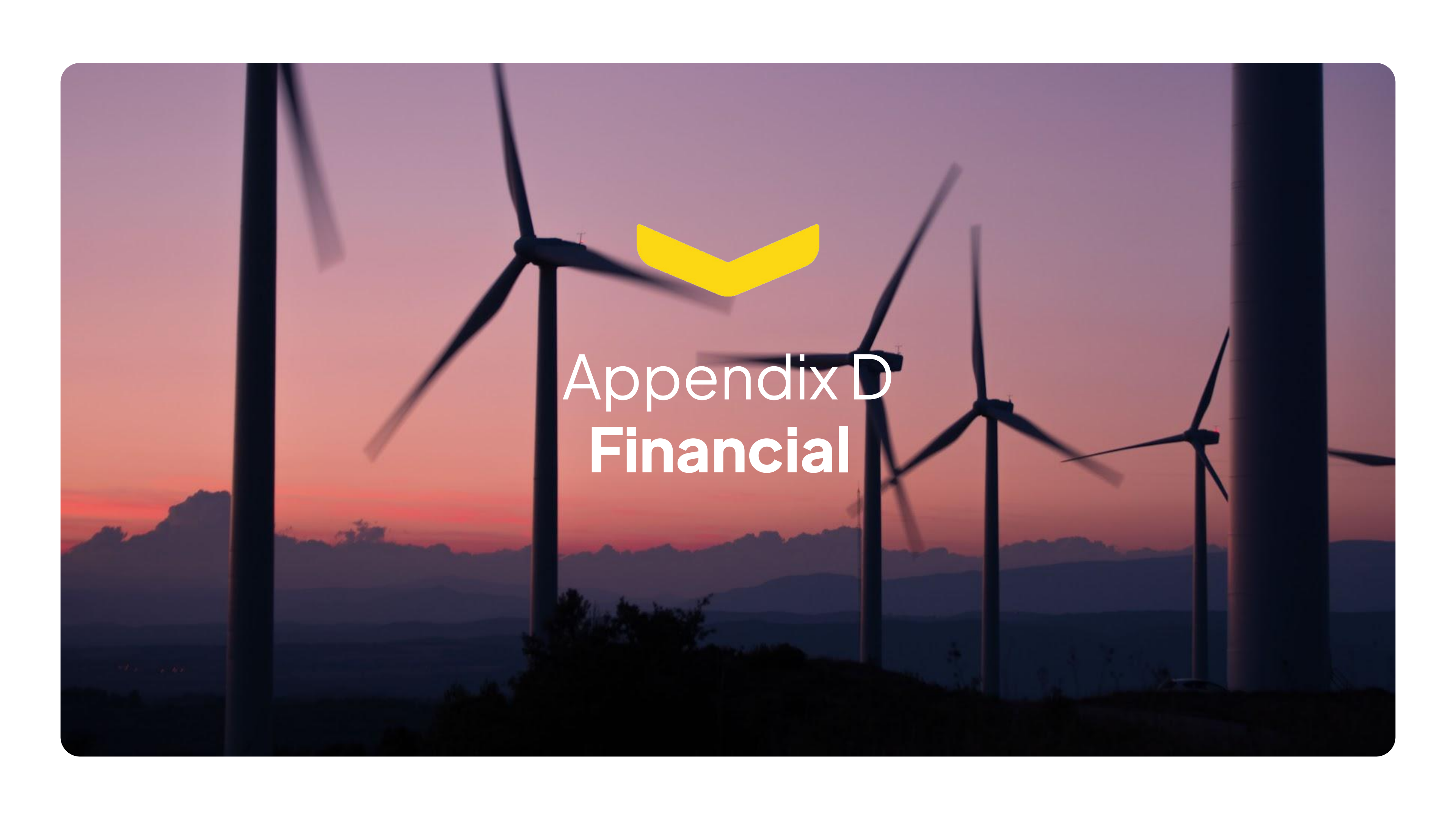




Pioneering the way with **3,010 chargers** across our scalable network

	300kW+	150–200kW	50kW	Total
	1011	197	15	1,223
	387	24	–	411
	420	4	4	428
	503	–	–	503
	238	13	20	271
	78	–	–	78
	64	–	–	64
	16	–	–	16
	16	–	–	16
Total	91%	8%	1%	100%





Appendix D **Financial**

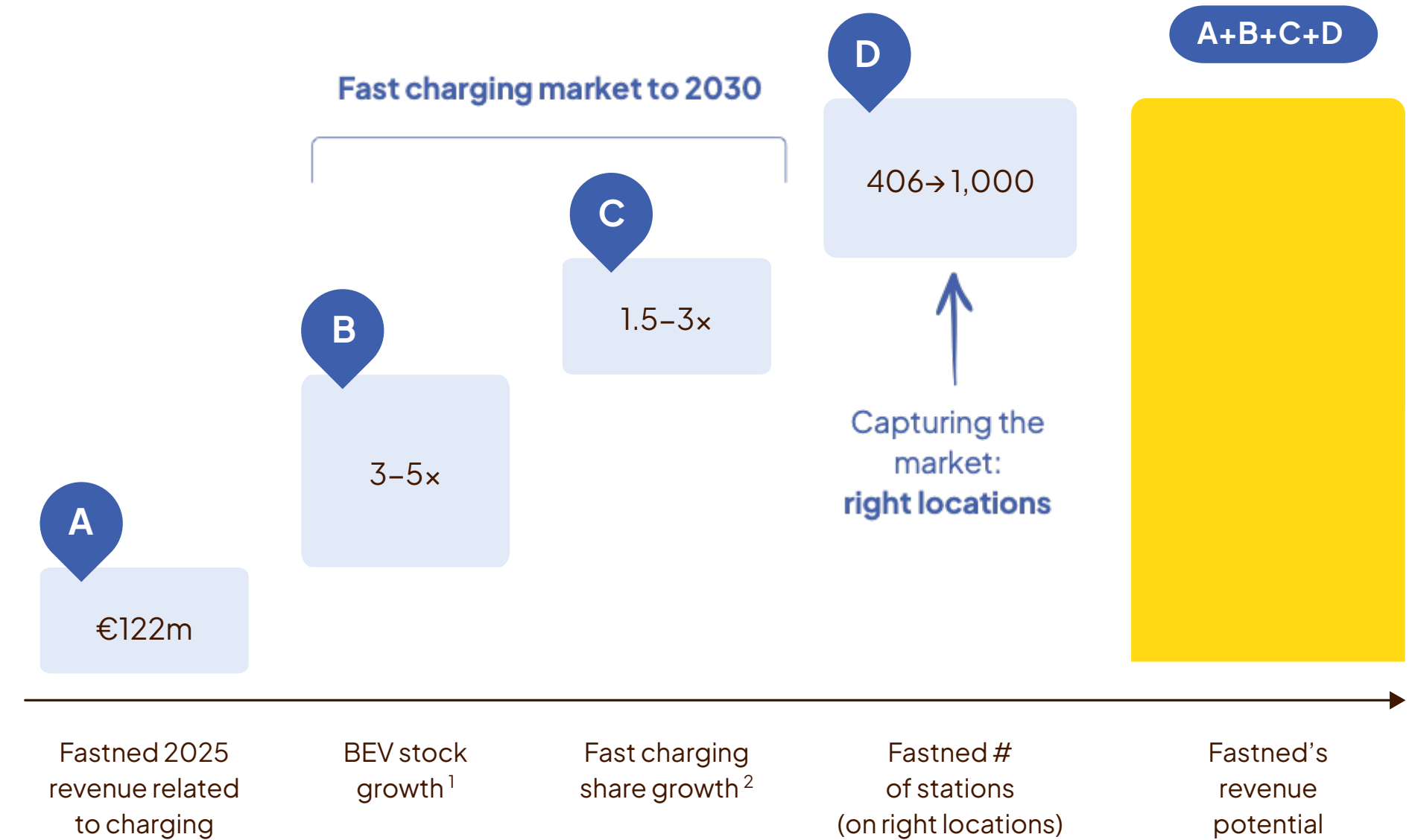


Fastned revenue potential



BEV stock growth x Fast charging growth
x Right location growth

- ✓ Fast charging demand accelerating- 1.5–3x more BEVs- 3–5x more fast charging
- ✓ High traffic locations are paramount to capture this market
- ✓ Fastned # locations to grow 2.5x
- ✓ Revenue potential growing accordingly





Key operating data – Netherlands and Germany

The Netherlands

	2018	2019	2020	2021	2022	2023	2024	2025	Q1 2026	Q2 2026	Q3 2026
Period end BEV penetration	0.5%	1.2%	2.0%	2.8%	3.7%	4.8%	6.0%	7.1%	7.4%	8.0%	8.4%
Sessions per station per day (ave for the period) (A)	8.6	15.2	15.9	22.5	36.4	50.3	57.3	65.3	78.1	72.3	74.4
Average charge speed (kW) (B)	35	39	43	48	56	61	63	67	65	72	75
Charge time (min) (C)	22	24	24	23	23	22	22	21	22	20	20
kWh per session (A x B / 60 min = D)	13	15	17	19	21	23	23	24	24	25	25
kWh per station per day (A x D)	112	235	272	419	762	1,136	1,329	1,561	1,890	1,780	1,853
Number of stations period end	77	98	105	132	151	168	181	184	184	184	185

Germany

Period end BEV penetration	0.2%	0.3%	0.6%	1.3%	2.1%	2.8%	3.3%	4.0%	4.3%	4.7%	5.2%
Sessions per station per day (ave for the period) (A)	2.3	4.1	4.5	8.9	16.1	23.5	27.3	26.7	28.9	25.9	31.3
Average charge speed (kW) (B)	28	51	57	54	59	64	70	75	76	81	83
Charge time (min) (C)	26	30	29	30	31	31	30	29	29	26	26
kWh per session (A x B / 60 min = D)	16	25	28	27	31	33	35	36	36	35	36
kWh per station per day (A x D)	37	103	125	242	493	783	945	963	1,038	910	1,112
Number of stations period end	8	15	18	31	37	39	42	54	54	66	69



Key operating data – Belgium and United Kingdom

	2018	2019	2020	2021	2022	2023	2024	2025	Q1 2026	Q2 2026	Q3 2026
Belgium	Period end BEV penetration		0.5%	0.9%	1.5%	2.2%	4.0%	7.0%	7.8%	8.8%	9.5%
	Sessions per station per day (ave for the period) (A)		1.4	8.0	25.0	42.1	49.6	52.8	61.9	58.8	61.2
	Average charge speed (kW) (B)		60	61	68	71	72	74	70	78	82
	Charge time (min) (C)		25	24	24	24	24	24	25	23	22
	kWh per session (A x B / 60 min = D)		25	25	27	29	29	29	30	30	30
	kWh per station per day (A x D)		36	197	681	1,219	1,442	1,539	1,827	1,750	1,853
	Number of stations period end		1	9	18	24	36	52	52	55	60
United Kingdom	Period end BEV penetration		0.6%	1.2%	1.9%	2.7%	3.7%	4.9%	5.2%	5.8%	6.1%
	Sessions per station per day (ave for the period) (A)		2.9	6.0	19.0	26.3	30.8	28.0	30.1	28.5	30.2
	Average charge speed (kW) (B)		30	34	42	47	47	54	52	58	62
	Charge time (min) (C)		38	42	40	39	40	36	36	32	31
	kWh per session (A x B / 60 min = D)		19	24	28	30	31	33	31	31	32
	kWh per station per day (A x D)		54	142	526	798	964	911	933	884	952
	Number of stations period end		6	8	11	20	30	37	38	39	42



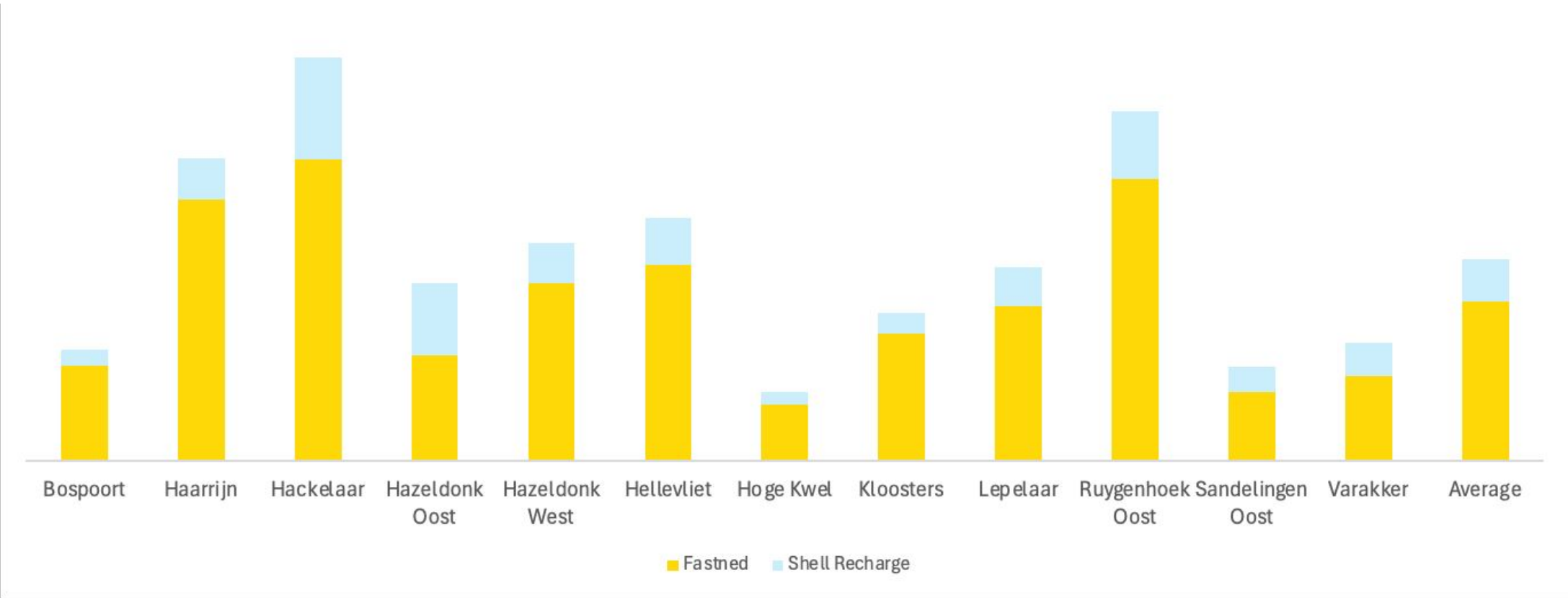
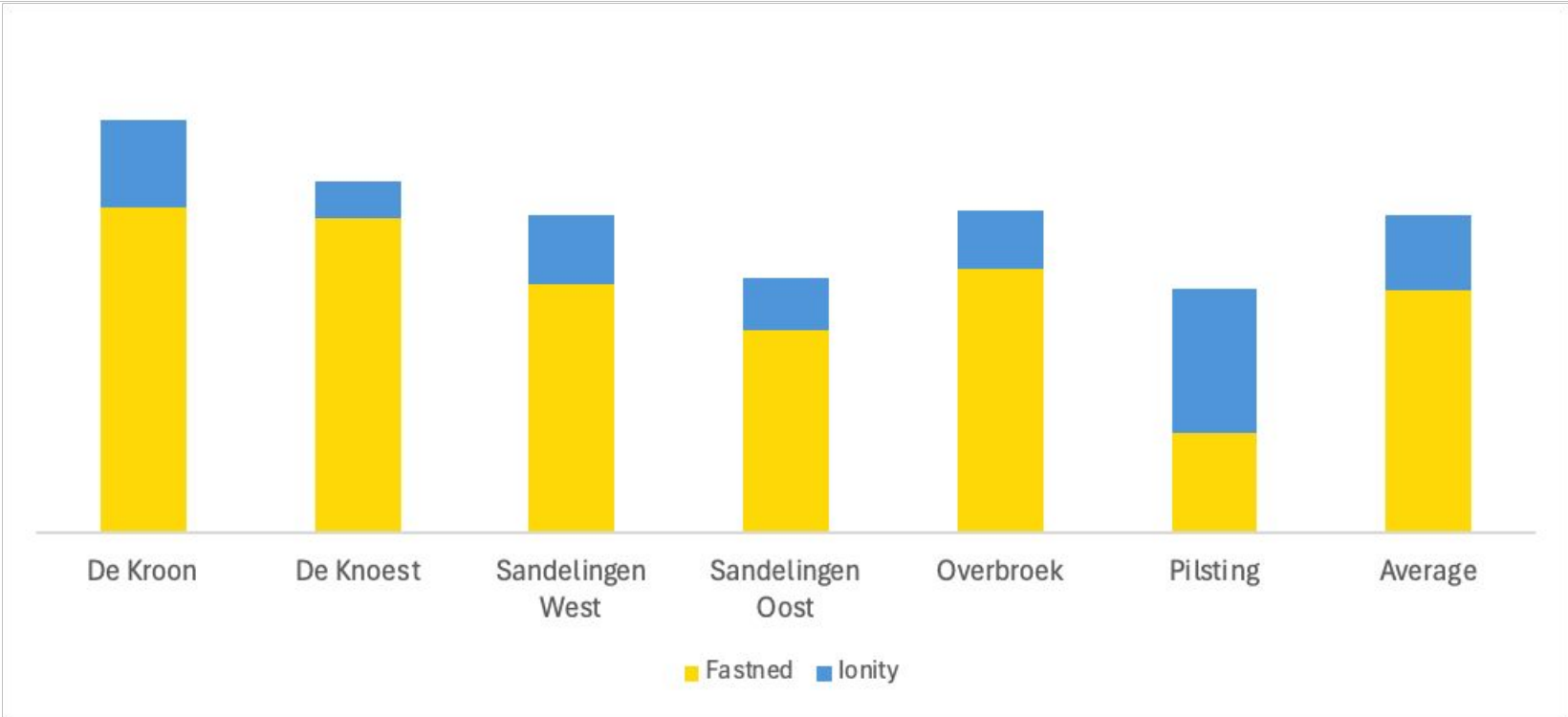
Key operating data – France and Fastned Total

	2018	2019	2020	2021	2022	2023	2024	2025	Q1 2026	Q2 2026	Q3 2026
France	Period end BEV penetration			1.0%	1.6%	2.3%	3.0%	3.8%	4.1%	4.5%	4.8%
	Sessions per station per day (ave for the period) (A)			0.7	7.5	17.7	28.5	36.3	35.8	47.9	60.7
	Average charge speed (kW) (B)			54	59	64	65	70	67	73	77
	Charge time (min) (C)			30	29	29	29	28	29	27	27
	kWh per session (A x B / 60 min = D)			27	29	30	31	33	32	33	35
	kWh per station per day (A x D)			19	218	538	897	1,184	1,145	1,574	2,118
	Number of stations period end			6	23	38	44	59	60	62	66
Total	Period end BEV penetration		1.3%	2.1%	2.9%	3.9%	4.9%	6.0%	6.4%	7.0%	7.4%
	Sessions per station per day (ave for the period) (A)		12.5	15.5	26.0	39.9	45.8	49.5	55.6	52.9	56.7
	Average charge speed (kW) (B)		43	49	56	61	64	69	66	74	77
	Charge time (min) (C)		24	24	24	24	24	24	24	23	23
	kWh per session (A x B / 60 min = D)		18	19	22	25	26	27	27	28	29
	kWh per station per day (A x D)		220	301	583	986	1,186	1,335	1,506	1,471	1,633
	Number of stations period end		131	188	244	297	346	406	414	434	451



Appendix E **Competition**

Outperforming competitors at co-locations¹



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

Total number of sessions in 2025



Shell



Fastned



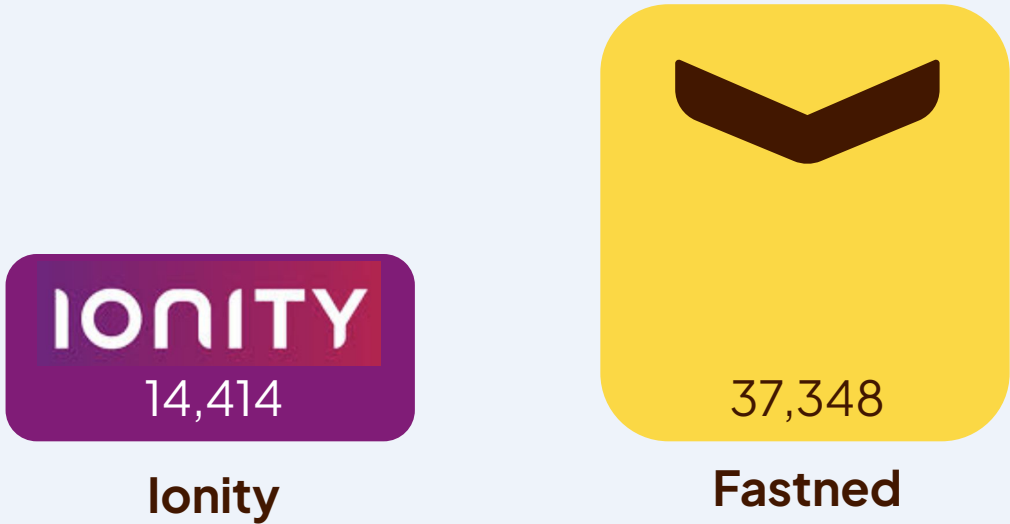
¹) Charging Radar

Outperforming competitor at Baraque de Fraiture co-location¹

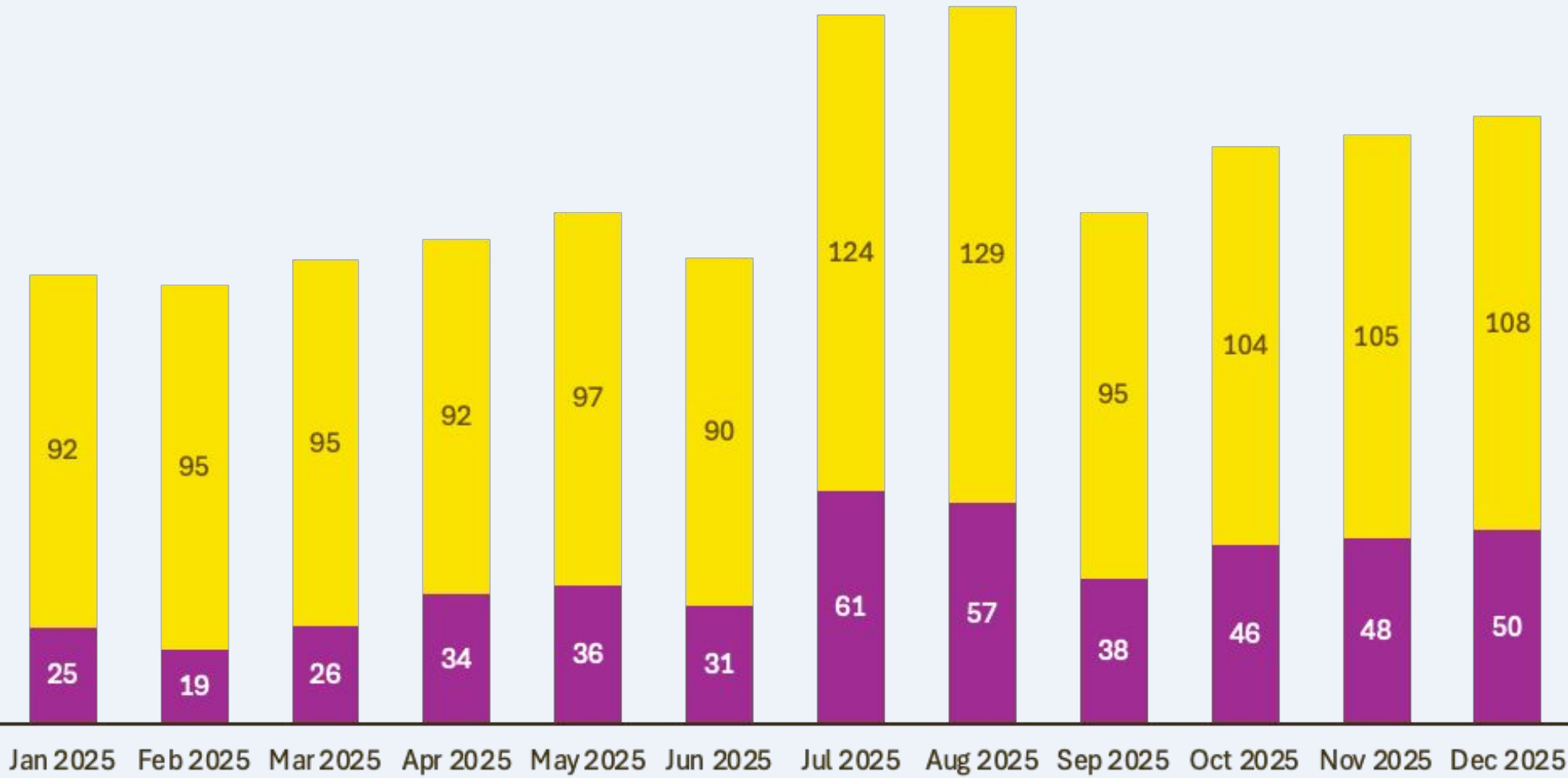


Case Study: 2.5× charging volumes at co-located station Baraque de Fraiture

Total number of sessions in 2025



Sessions per station per day (2025)



1) Charging Radar



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

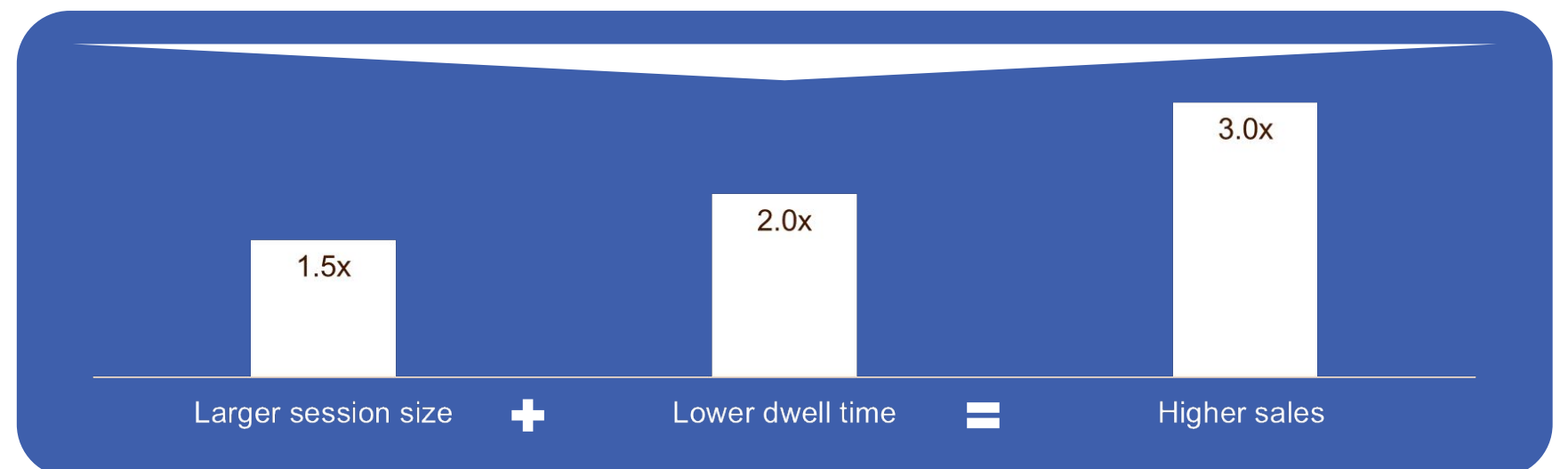
Dwell time behaviour is determined by the location of the charging station

- **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%
Sessions / station / day	150	40
State of Charge	25%	50%
Battery size	69 kWh ¹	69kWh ¹
Maximum session size	52 kWh	35kWh
Dwell time	15 min	30 min ²
Maximum session charge speed	207 kW	69 kW
Utilisation rate	25%	25%
Max. annual per charger throughput	453 MWh	151 MWh
Max. annual per charger revenue	€227k	€76k
Max. annual per station revenue	€1,417k	€252k





Appendix F **BEV Market**

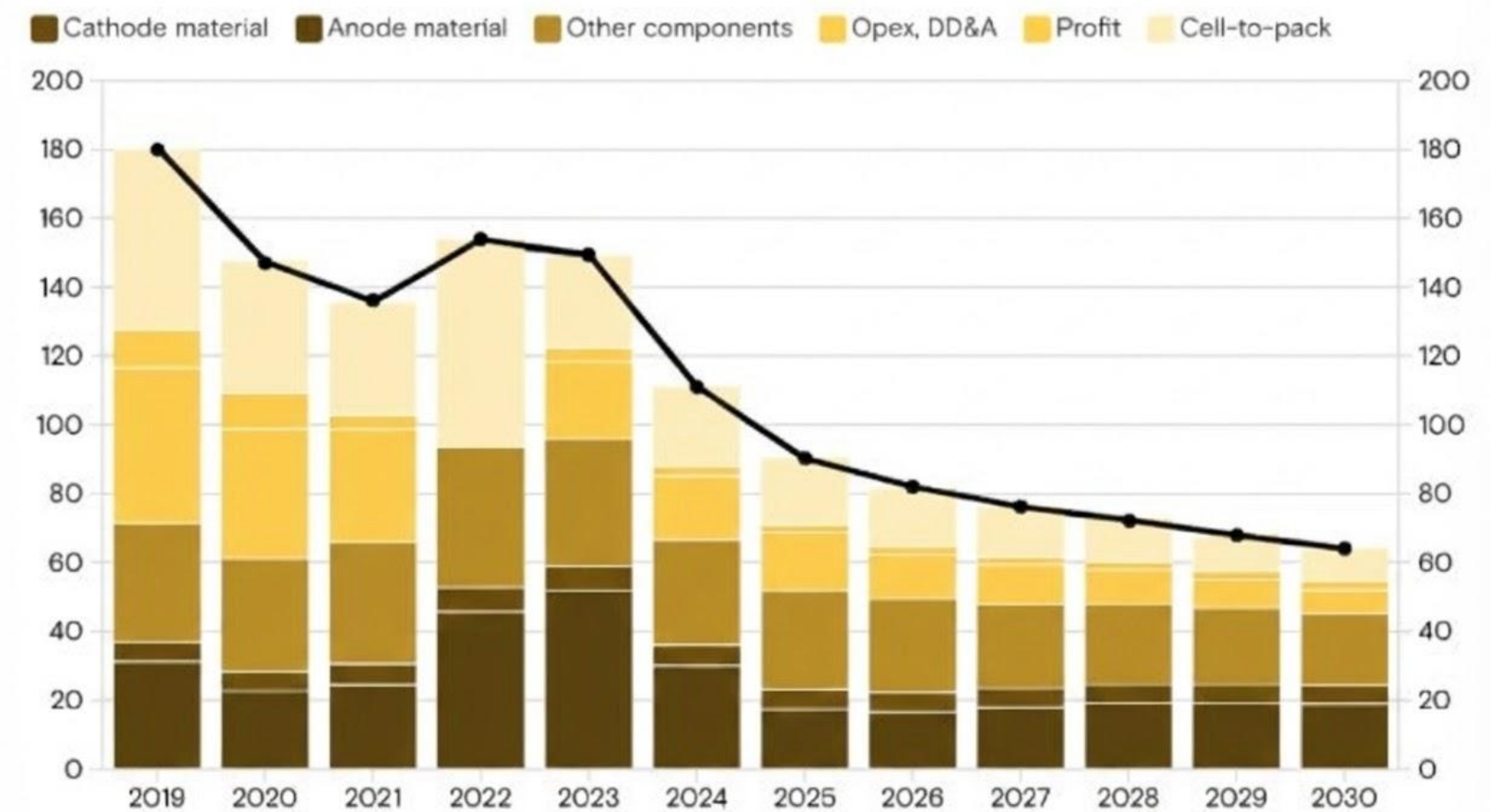


Long term BEV growth drivers in place

- 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 and expected to fall below \$60/kWh by 2030¹...

Average battery pack prices \$/kWh



1) [Mobility Portal: Goldman Sachs "Battery Prices to Fall Below \\$60/kWh by 2030"](#)



Comparable ICE and BEV offerings are fast approaching price parity

Improvements in battery prices and technology are driving the move towards price parity

→ **BEV prices are rapidly falling and are soon to be cheaper than ICE counterparts.**

Battery prices, quality improvements, scale, and EU regulation are supporting the decrease in BEV purchase prices

→ **Structural, not temporary shift.**

Current EU BEVs still include 5-year-old tech and battery contracts, and therefore do not reflect future prices, while falling ICE volumes (down 50–80%) will erase scale advantages and make models like a €33k VW Golf hard to sustain.

VW Golf Case study

Powertrain	Years		
	2015	2025	2035?
BEV			
	VW e-Golf	VW ID.3 Pure	Mid-sized BEV
Price	€45,500	-27% → €33,300	-14% → €28,700
Real-world range	125 km	x2.6 → 325 km	+28% → 415 km
Charging power	40 kW	x3.6 → 145 kW	x2.4 → 350 kW
ICE			
	VW Golf 1.4 TSI	VW Golf 1.5 eTSI	Mid-sized ICE
Starting Price	€31,400	+5% → €33,000	+0% → €33,000

Five-minute charging: setting the stage for mass adoption, growing the appetite for public fast charging and increasing infrastructure efficiency

1

Charging speeds continue to improve...

BYD Showcases EV with 'Megawatt' Five Minute Charging Time



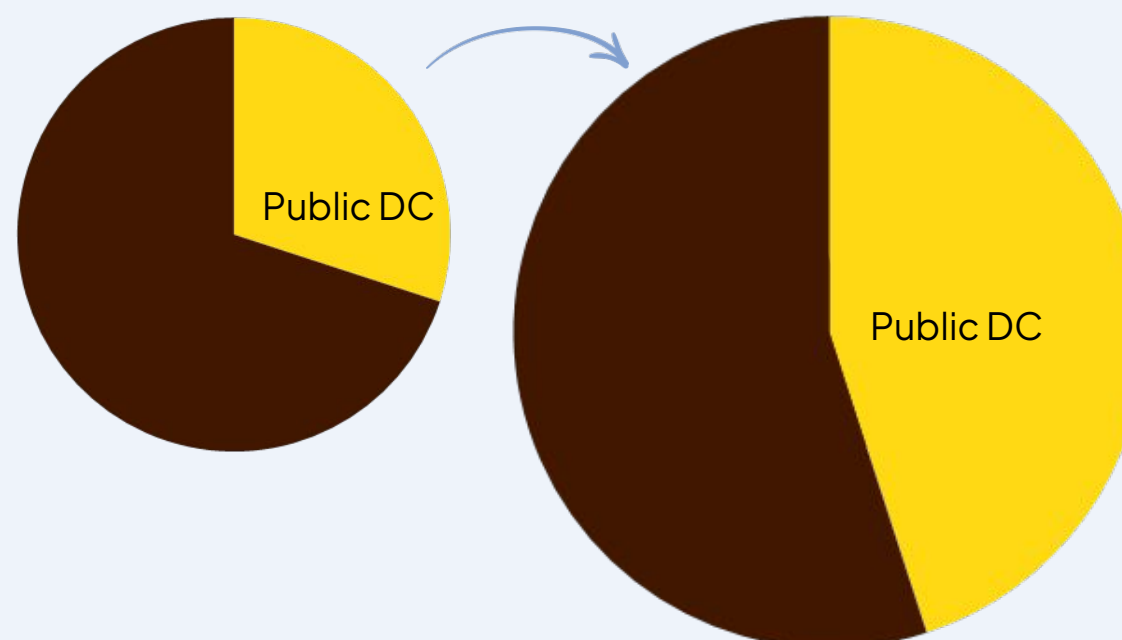
Chinese electric vehicle manufacturer BYD has introduced a new charging system that it claims could enable EVs to charge as quickly as it takes to refuel a petrol car.

- Technology continues to improve with BYD releasing **400km of range in five minutes charging**
- This technology is expected to **form part of the BEV mass market adoption**

2

...making EVs and fast-charging more appealing, scaling the market...

Share and absolute charging demand increases



- Five-minute charge speeds will **make fast charging more attractive than slow charging**
- This development takes away another key bottleneck to scale EV adoption

3

...and improving infrastructure efficiency

Faster charging

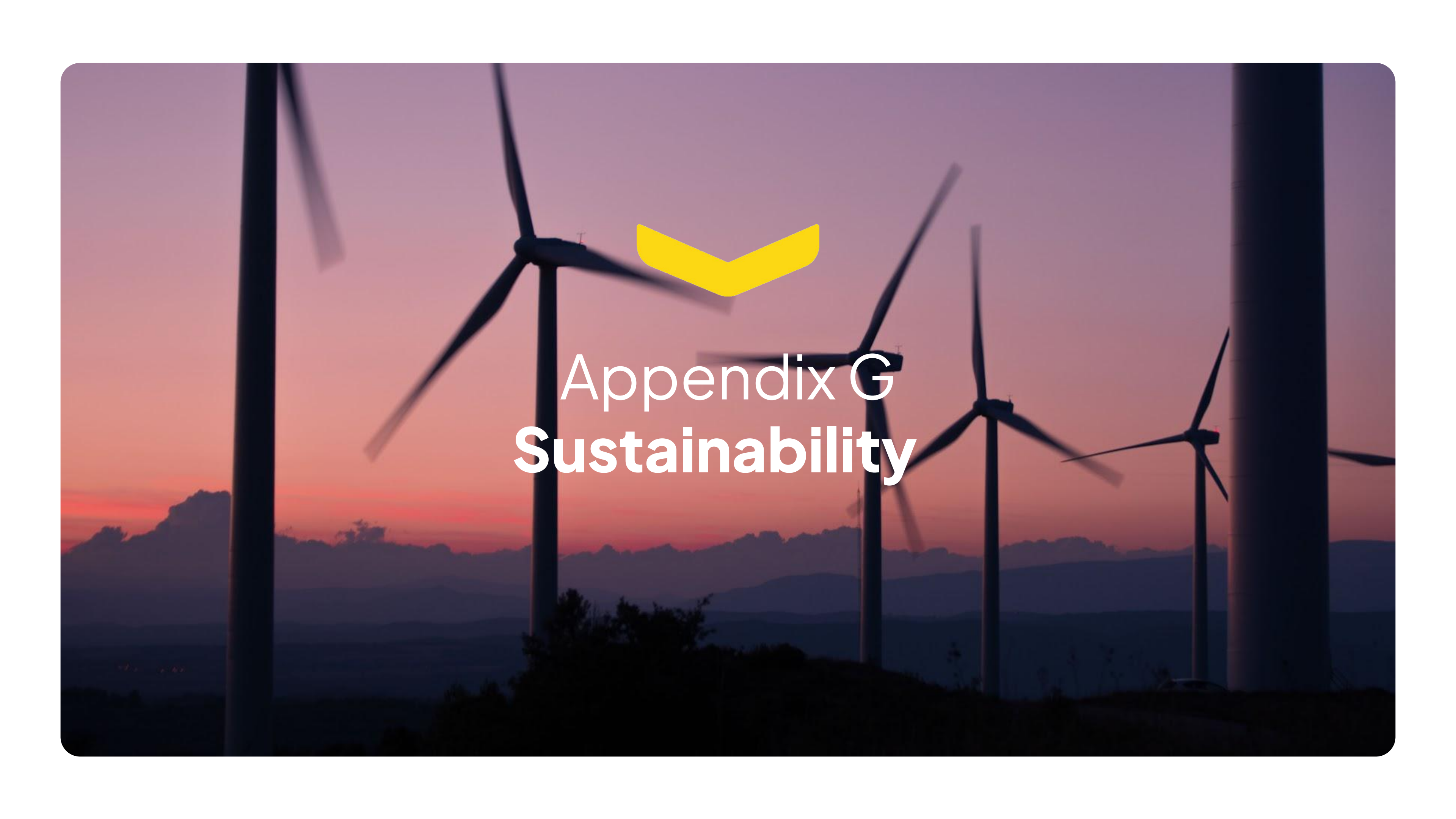


Shorter sessions for the same session size



Fewer chargers need to service same demand

- More investment would be needed in faster chargers and larger grid connections to accommodate 1MW charge speeds
- However, **fewer chargers and less civil works would be needed at stations** to service the same demand



Appendix G **Sustainability**



Improving ESG performance through fulfillment of roadmap milestones

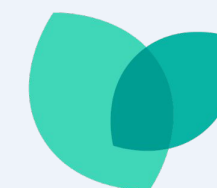
- ✓ Published first climate transition plan as part of CO2 Performance Ladder certification
- ✓ Completed a second limited assurance engagement on 5 ESG KPIs in 2025, as shared in 2025 annual report
- ✓ Scope 1, 2 and 3 emissions were a KPI verified through limited assurance engagement (mentioned above)
- ✓ UN SDGs adopted in 2022



GREENHOUSE GAS PROTOCOL



SUSTAINABLE DEVELOPMENT GOALS



CO₂ PERFORMANCE LADDER



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

Compliance and reporting

- For the first time, Fastned prepared the sustainability section of the 2025 annual report following the basic and comprehensive modules of the VSMEs
- For a second time, participated in a limited assurance engagement on 5 ESG KPIs for 2025 annual report
- Shared biodiversity information for the first time in our 2025 annual report, as part of VSME reporting
- EU Taxonomy eligibility

Understanding our footprint

- Calculated CO2 footprint data for all Fastned stations based on LCA of a standard NL station, and a shops footprint based on spend-based data
- Received limited assurance on scope 1, 2 and 3 emissions calculations for a second time in 2026
- Recertified for the CO2 Performance Ladder in late 2025, this time with the new handbook, achieving Level 2; Will recertify again in 2026
- Updated our relative CO2 emissions reduction targets and introduced an absolute target—both of which can be found in our [new Climate Transition Plan](#)

Making a positive impact

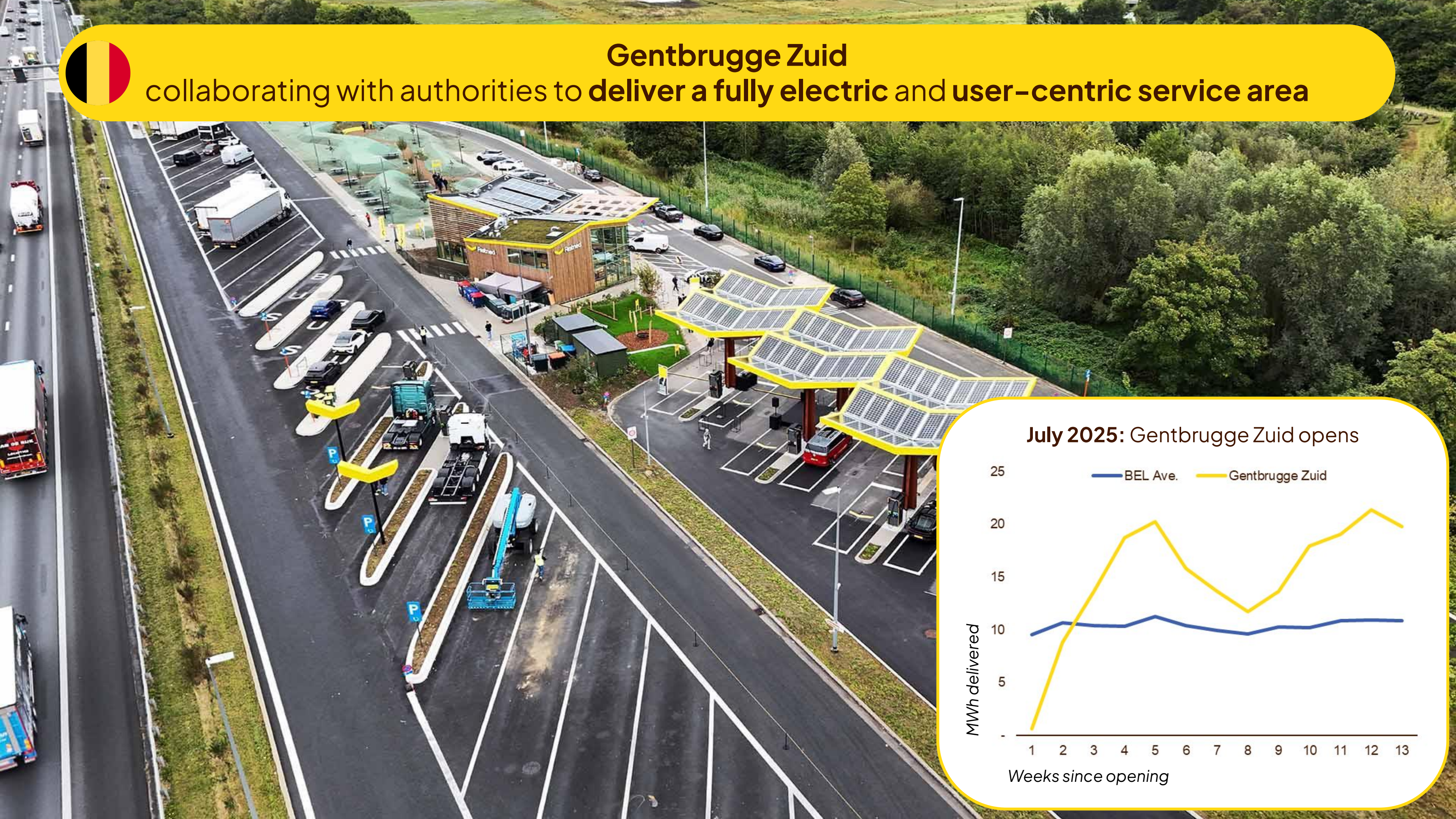
- Piloted low-carbon construction projects in 2022 and 2024; Investigating more opportunities
- Validated [our 2024 Guarantees of Origin](#) to give more transparency to customers; 2025 is in progress
- Engage in community outreach initiatives ~3–4 times a year across entire organisation
- Became [B Corp certified](#) in Q3 2024



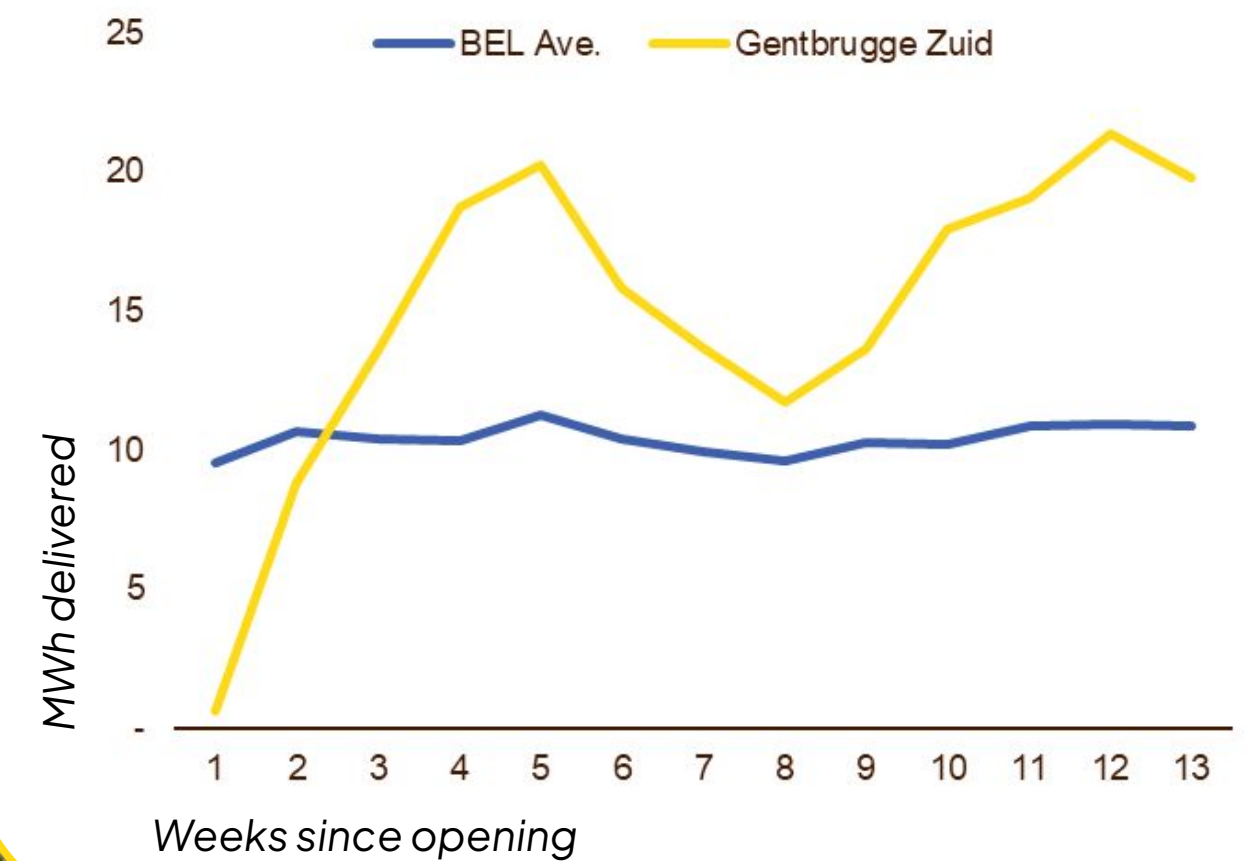
Appendix H **Future Industries**



Gentbrugge Zuid
collaborating with authorities to **deliver a fully electric and user-centric service area**



July 2025: Gentbrugge Zuid opens





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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