



 **Fastned**

Investor Presentation

April 2026

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



Disclaimer

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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

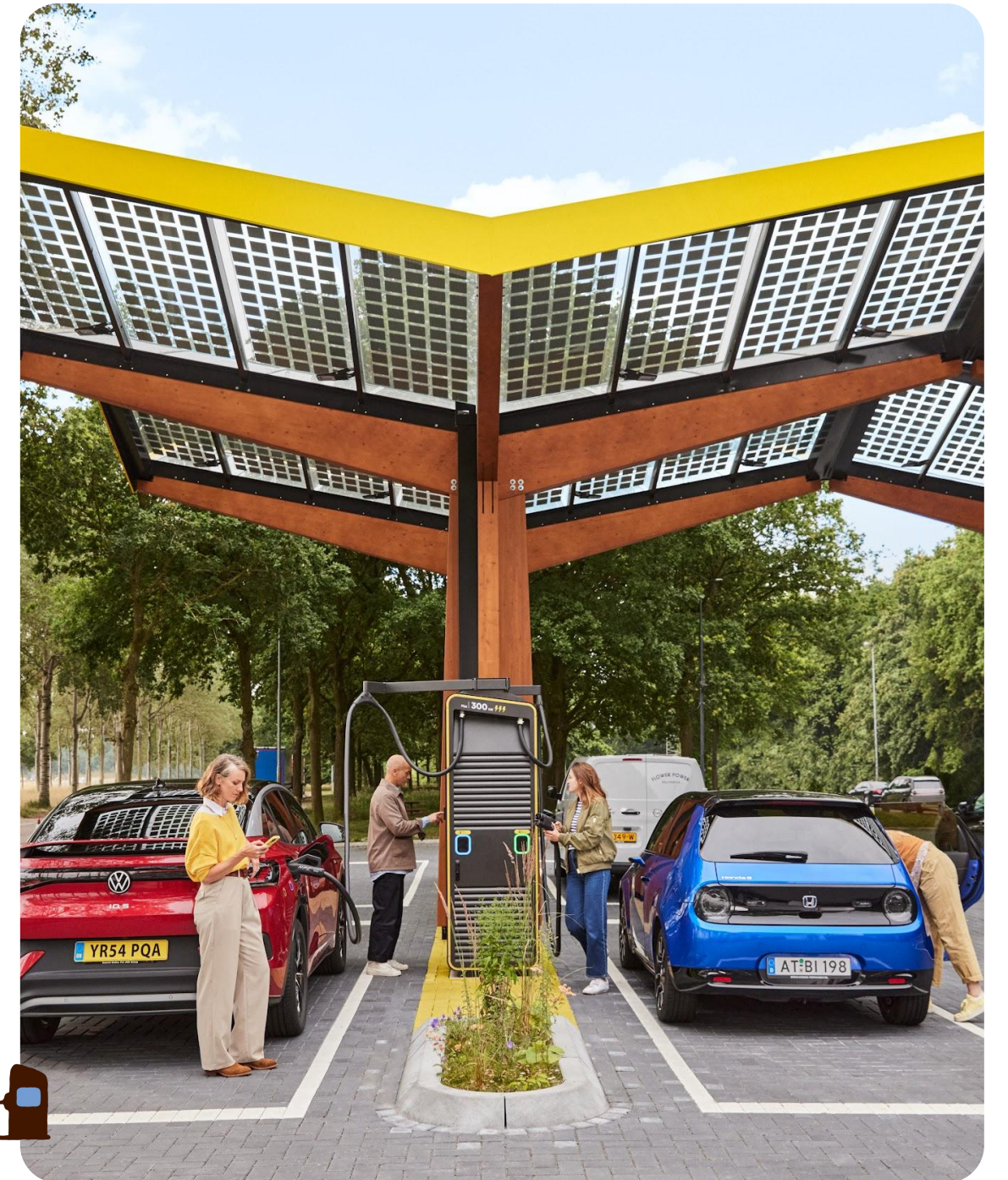
Mission-driven company with ESG at the core of everything we do

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





Fastned

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

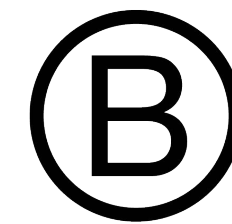


100% local sun, wind & hydro energy¹

2025 CO₂e avoided

165,9
kilotonnes

Certified



Corporation

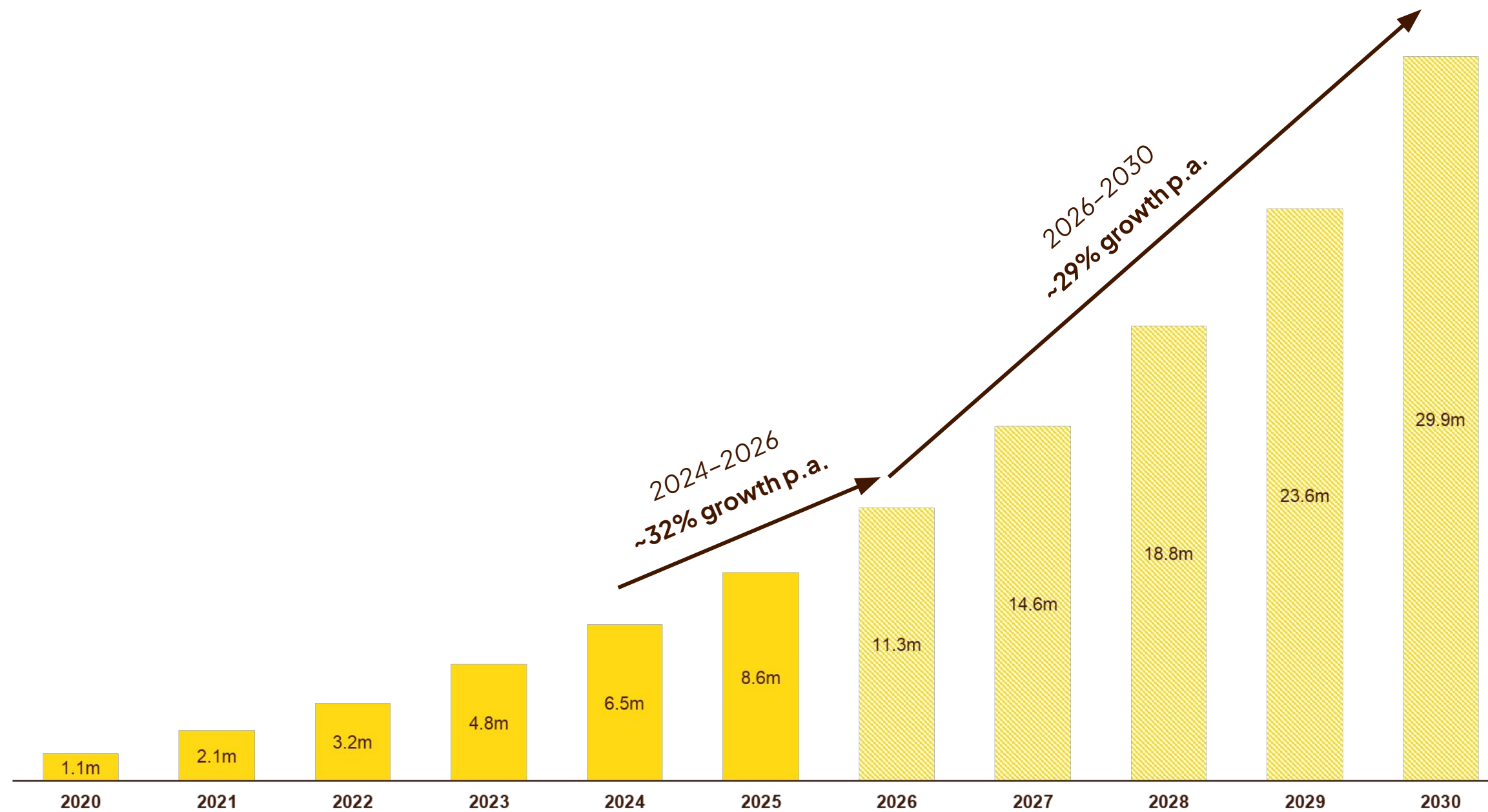
¹) For every kWh sold through the grid we buy local (same or adjacent country) solar & wind guarantees of origin



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

BEV fleet in Fastned's operating geographies¹

2030 BEV Charging Market



>30 million electric vehicles

> 75 billion kWh / year
recurring charging demand

> 30% public fast charging²










> € 10bn high growth fast charging market³

Notes: 1) Operating geographies include short and long term targets such as Ireland, Poland, Austria. Source: Schmidt Automotive Research November 2025. 2) BNEF Electric Vehicle Outlook 2024. 3) Fastned analysis



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

2024 energy volume sold¹

	Type	Main location strategy
	Car manufacturer	Off highway (navigational pull)
	Utility	Destination charging
	Pure play	High traffic roads
	Car manufacturer	High traffic roads
	Pure play	Off highway
	Oil major	Adding chargers on petrol stations
	Oil major	Adding chargers on petrol stations
	Oil major	Adding chargers on petrol stations
	Location owner / operator	Destination charging
	Pure play	High traffic roads

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

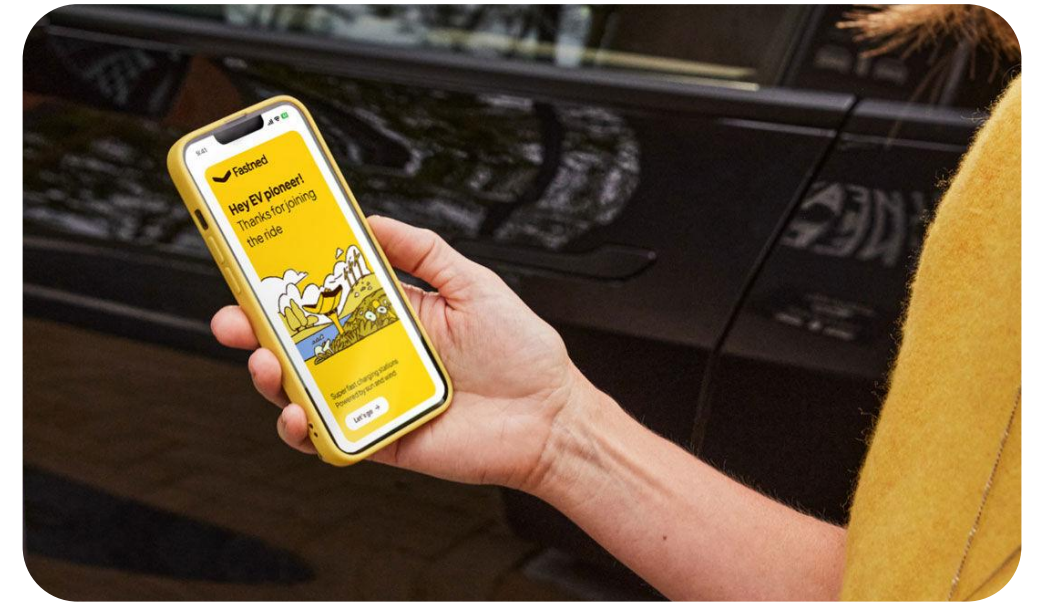


Software backbone & app



3

Best customer experience



99.9%
station uptime

63
customer NPS

Google
4.3 / 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

Country	Rank	Network	Country	Rank	Network	Country	Rank	Network	Country	Rank	Network
France	1	LE PLEIN	Belgium	1	ELECTRA	Germany	1	TESLA	Switzerland	1	ELECTRA
	2	MOBILIZE BEYOND AUTOMOTIVE		2	EnergyVision		2	Fastned		2	TESLA
	3	Fastned		3	Fastned		3	badenova		3	IONITY
	4	TESLA		4	TESLA		4	IONITY		4	Fastned
	5	ELECTRA		5	DATS 24		5	-chargepoint+		5	coop
	6	bp pulse		6	Allego		6	Allego		6	GOFAST
	7	R3		7	SPARKI CHARGE & GO		7	Aral pulse		7	swiss charge.ch
	8	atlante		8	IONITY		8	TANKE		8	MOVE
	9	zunder Charging Hero		9	E-Flux		9	EnBW		9	AGROLA
	10	Allego		10	powerdot		10	Shell Recharge		10	eCarUp

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

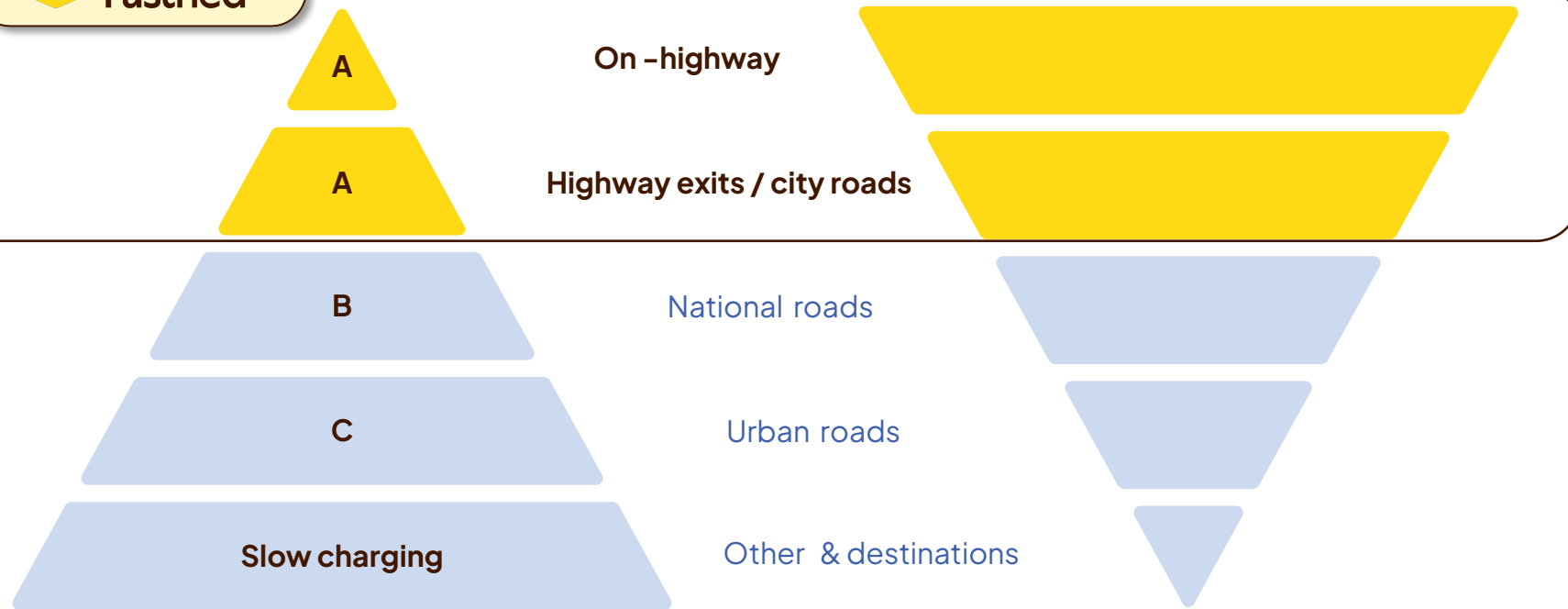
Location availability

100,000+ sites in Europe¹

Portfolio ambition

majority of locations on/near the **high traffic roads**

Fastned



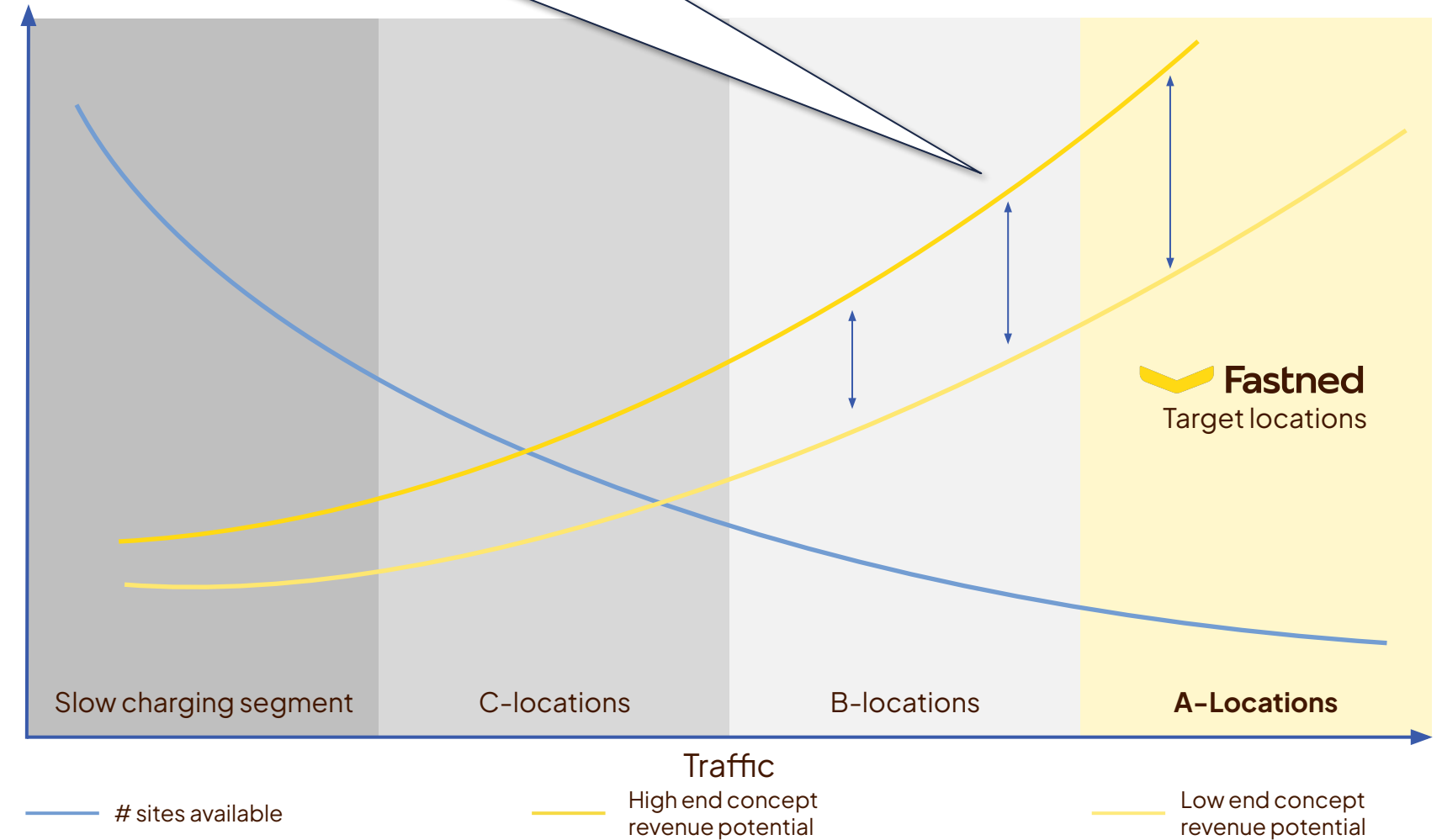
Fastned strengthens its strategic position by:

- 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

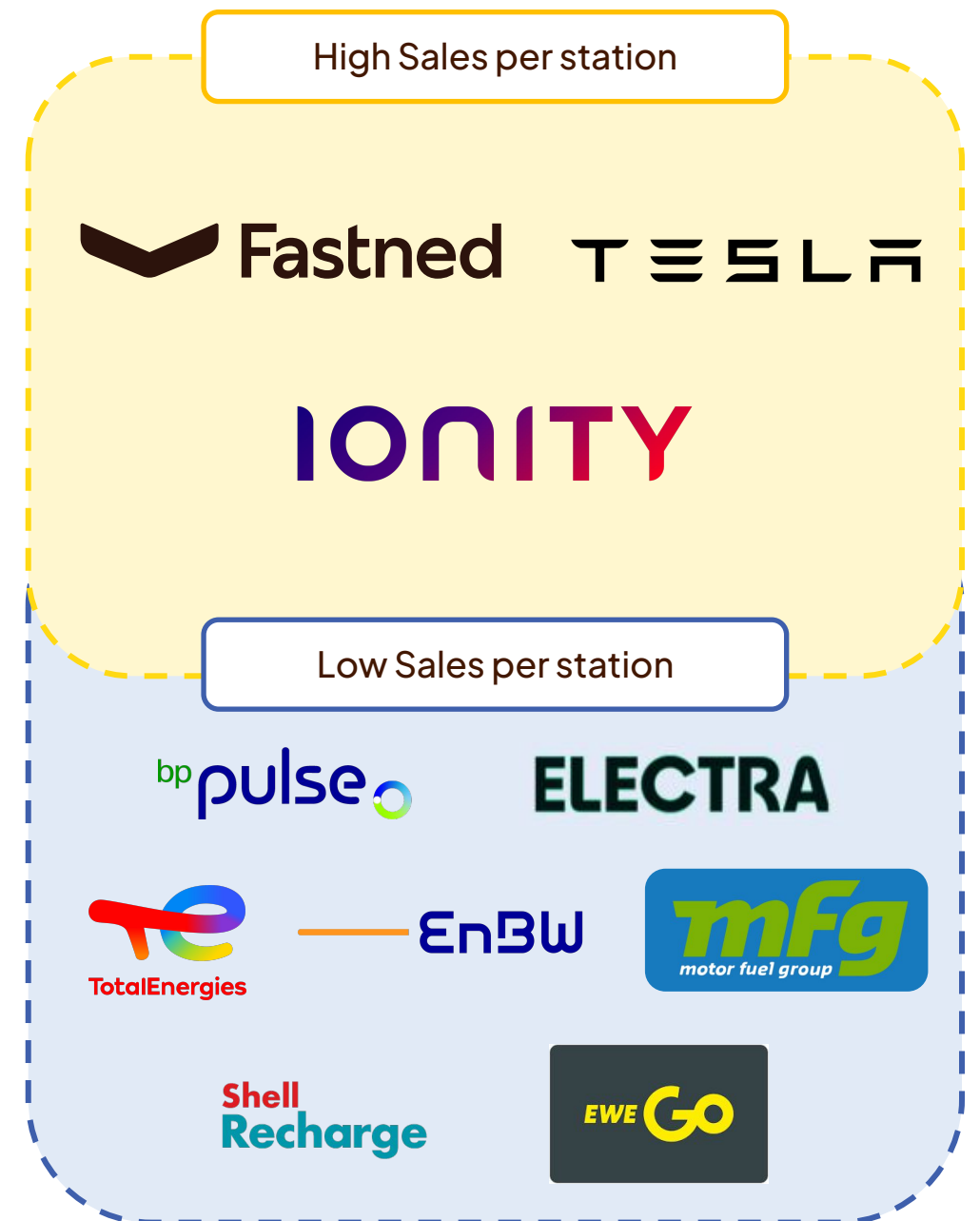
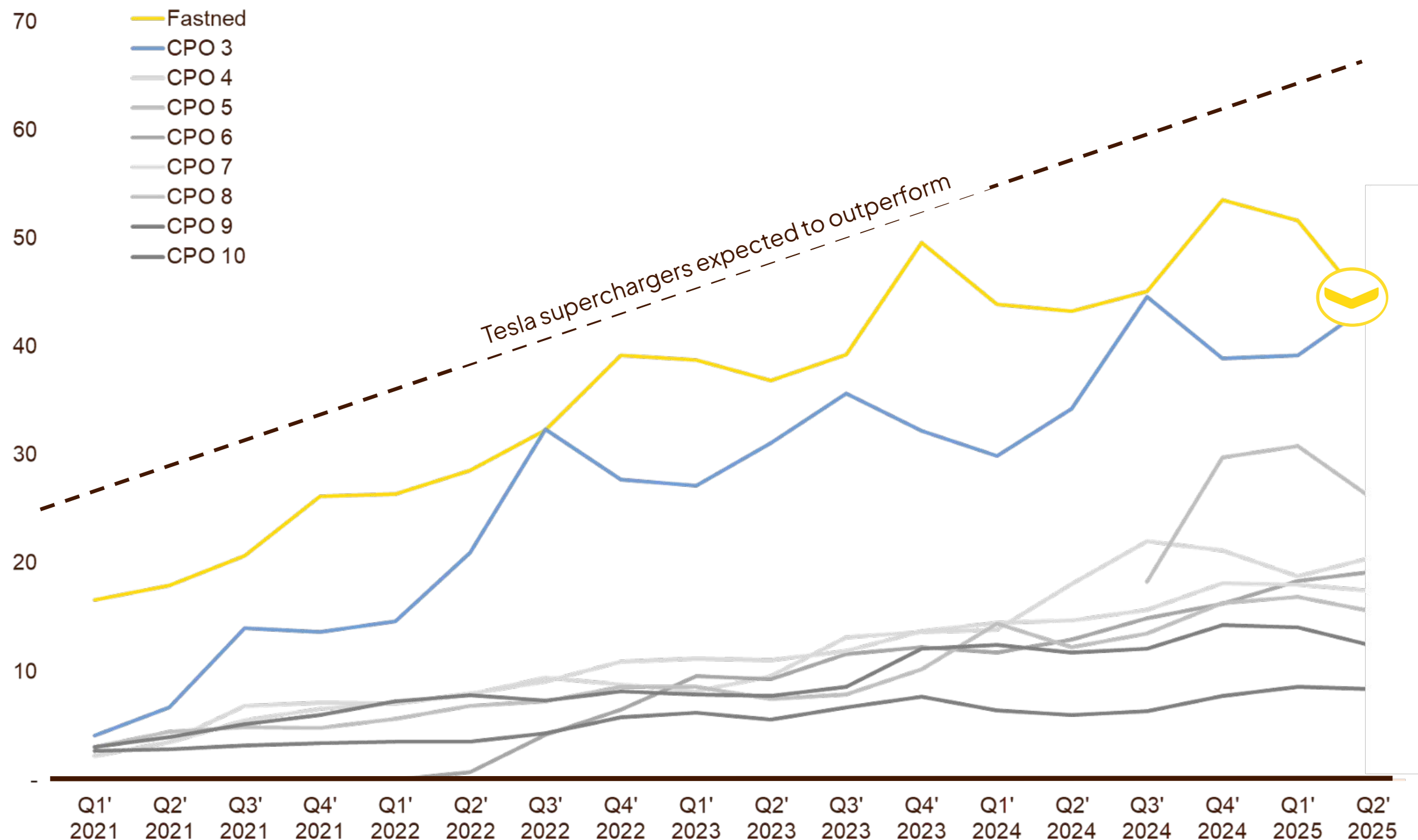
Strong concept drives revenue outperformance, with even greater uplift at premium locations





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

Daily sessions per station¹



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.



Station sales continue to grow

€k	Average station Q1 2025	Average station Q1 2026
Average daily traffic	~30k	~30k
BEV fleet penetration	~5.1% ¹	~6.4% ¹
Average # of chargers	6.1	6.5
Sessions per day	51	56
Average MWh (Annualised)	488 MWh	550 MWh
Annualised revenue / station	325 ²	387 ²
Gross margin	228 (€0.47/kWh)	316 (€0.58/kWh)
Operating costs per station	139 ³	150 ⁴
Operational EBITDA (B)	90 (28%)	166 (43%)
Initial investment (A) ⁵	835	958
ROIC (= B / A)	11%	17.3%
Time-based utilisation rate	13.9%	14.5%
ROIC at 30% utilisation, current charge speed	>40%	>40%

Results

Station sales continued to grow with energy delivered per average station increasing by 13% YoY.

YoY Organic sales growth for this quarter (excl. new stations) was 21%, comparing to BEV fleet penetration growth of 24%

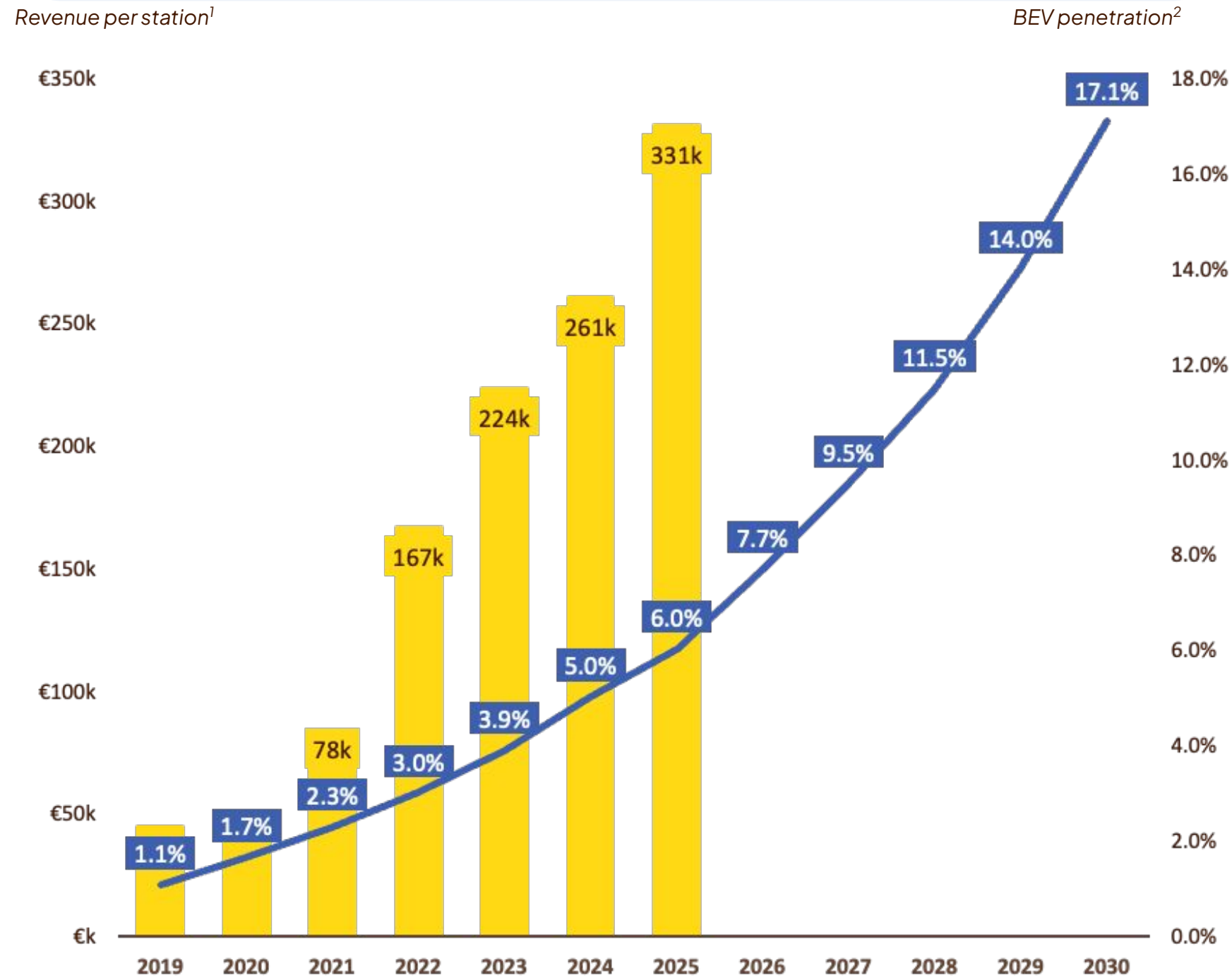
Building more stations in less mature markets has a dampening effect on sales per station growth. We estimated this effect at -2% in 2025 and expect -4% in 2026.

Q1 figures are unaudited and may be subject to change. 1) Average across Fastned countries, weighted by the number of stations in each country. Based on ACEA, Jan & Feb data. 2) Annualised revenue related to charging for the period. 3) Based on €22.6k per charger for 2025. 4) Based on €23k per charger for 2026. Time-based utilisation calculated as = (average session duration (hrs) * average sessions per day) / (number of chargers * 24 hours). 5) Non-depreciated PP&E relating to charging stations, including Right of Use assets. Q1 2025 and Q1 2026 initial investment figures are as at year end 2024 and 2025 respectively as this is the closest audited period.

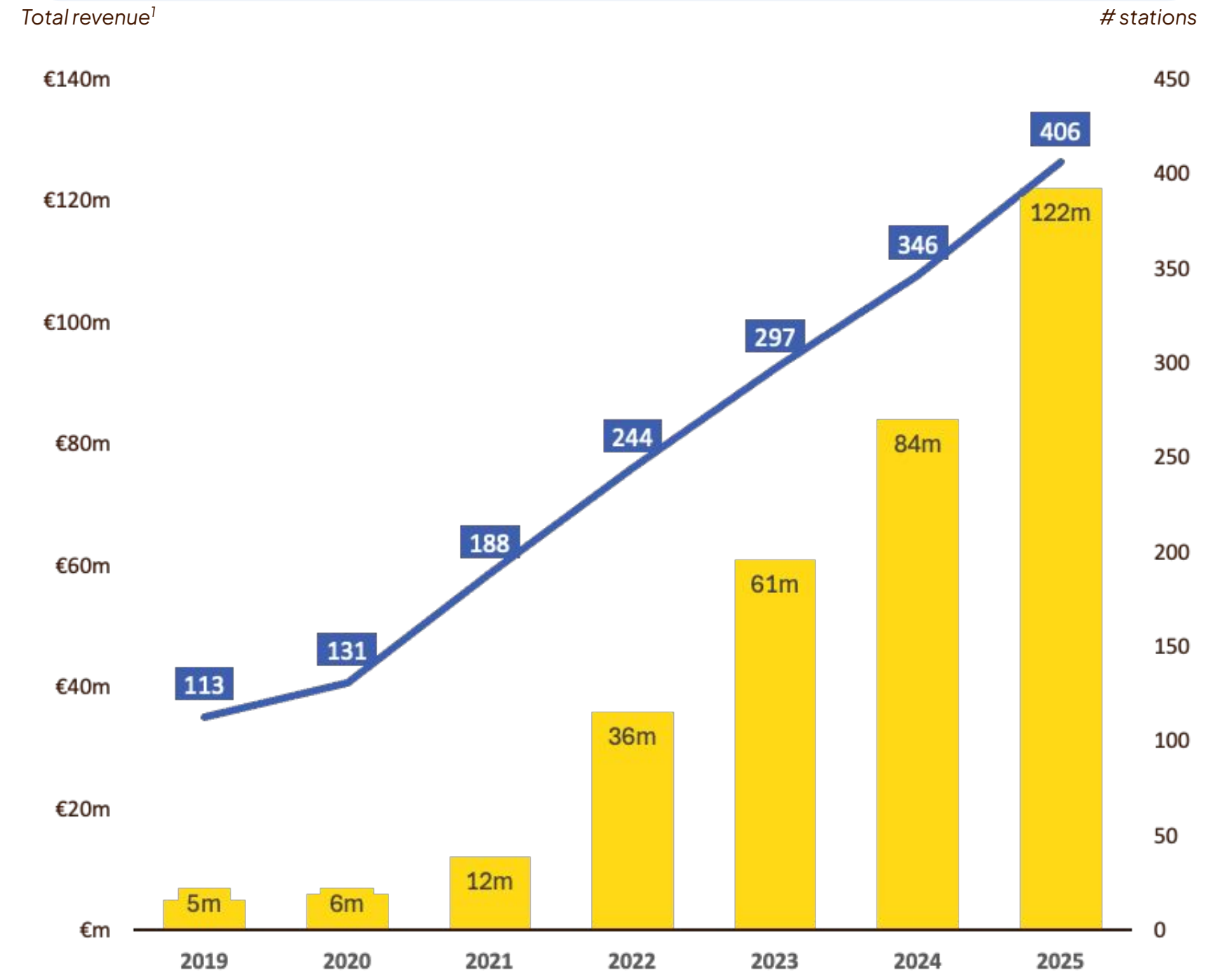


Fastned's top line has grown considerably - driven organically by BEV adoption and inorganically by building new stations

Organic growth through high traffic locations & BEV penetration growth



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



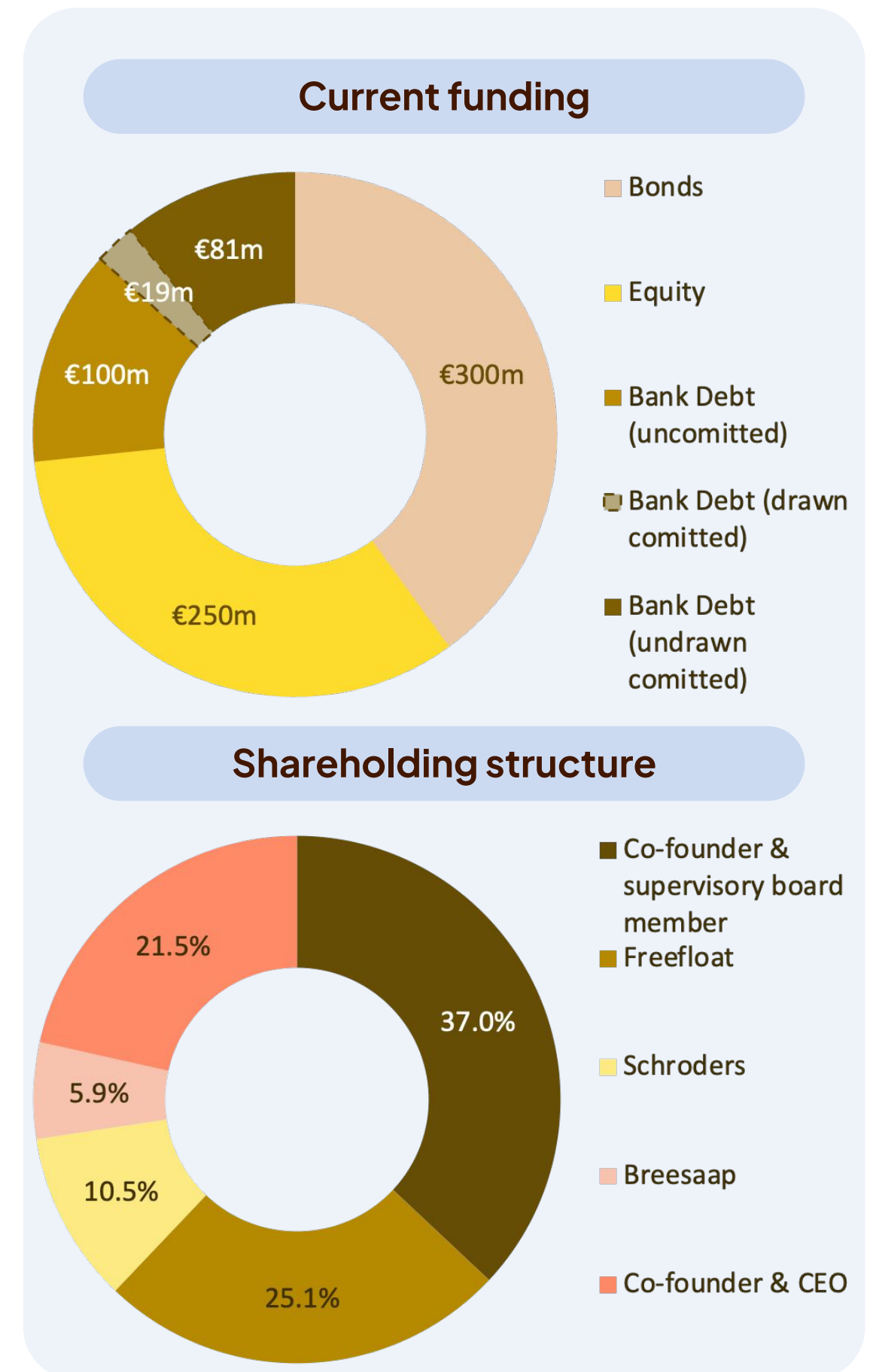
1) Only includes revenue relating to charging. 2020-2022 revenues impacted by reduced mobility due to Covid 2) Station-weighted BEV penetration.



We expect the retail bond and bank financing platforms to fund the 2026 rollout

Funding to date:

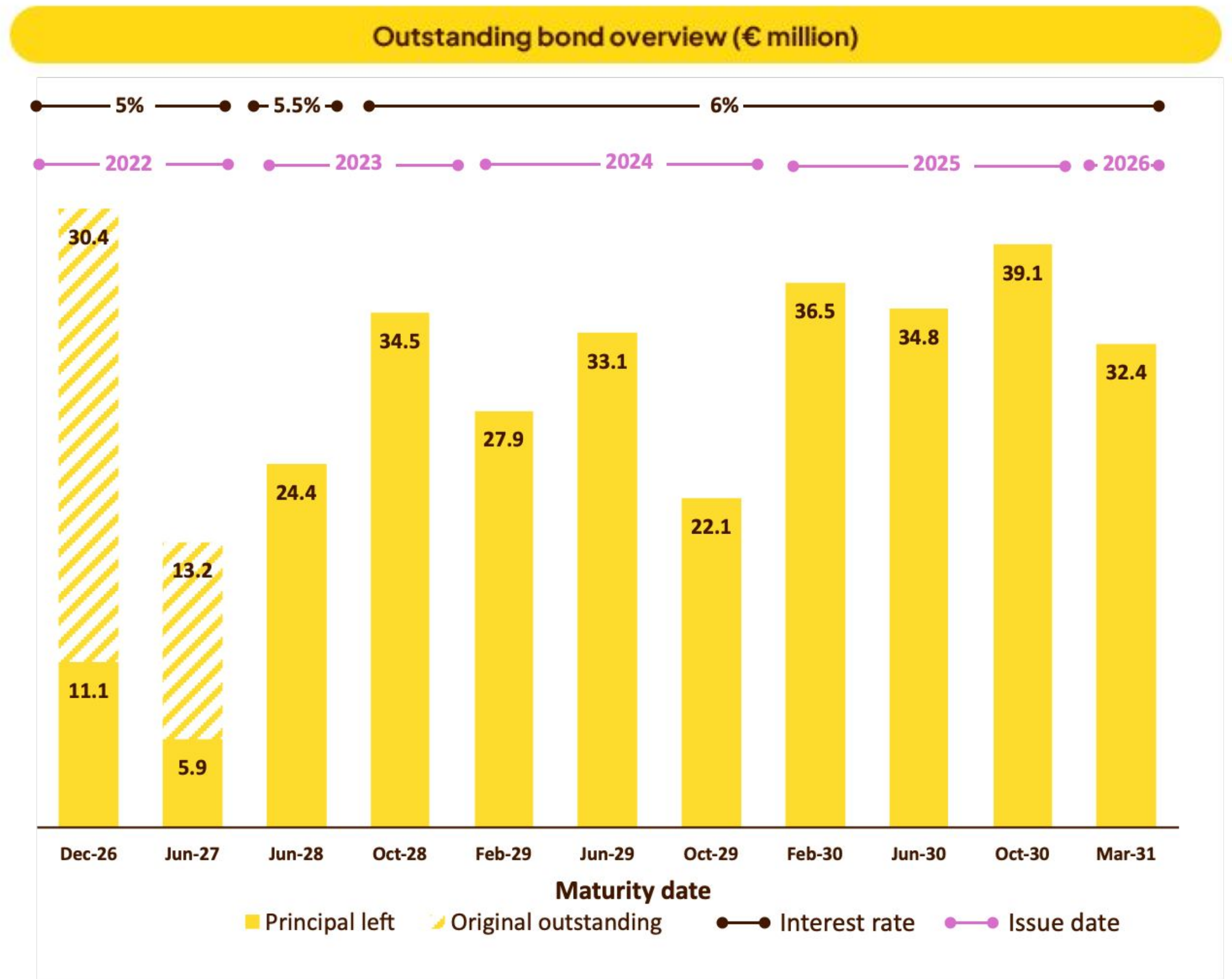
- ✓ **Equity platform:** ~€ 250 million in equity funding, through a combination of private placements, an accelerated bookbuild and founders investments
In Q4 2022, Schroders' infrastructure fund invested €75m in equity, became a board member, and long-term partner in our target of 1,000 stations by 2030
- ✓ **Retail bond platform:** >€ 300 million in retail bond funding
- ✓ **Cash level:** Current cash level of c.€95.5m (End of Q1 2026)
- ✓ **Bank Financing:** €200m in limited recourse debt for Belgium and Switzerland (€100m committed + €100m uncommitted accordion). ~€19 million has been drawn to date.





Outstanding bonds overview

- €302m in bonds outstanding following first tranche of 2026 at €32m
- Current issuance pace at **3 rounds per year**
- Allowing for funding **without financial covenants**
- **10,000+ bond investors** currently, adding on average ~850 new investors per new issue
- >50% of maturities are extended on average





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

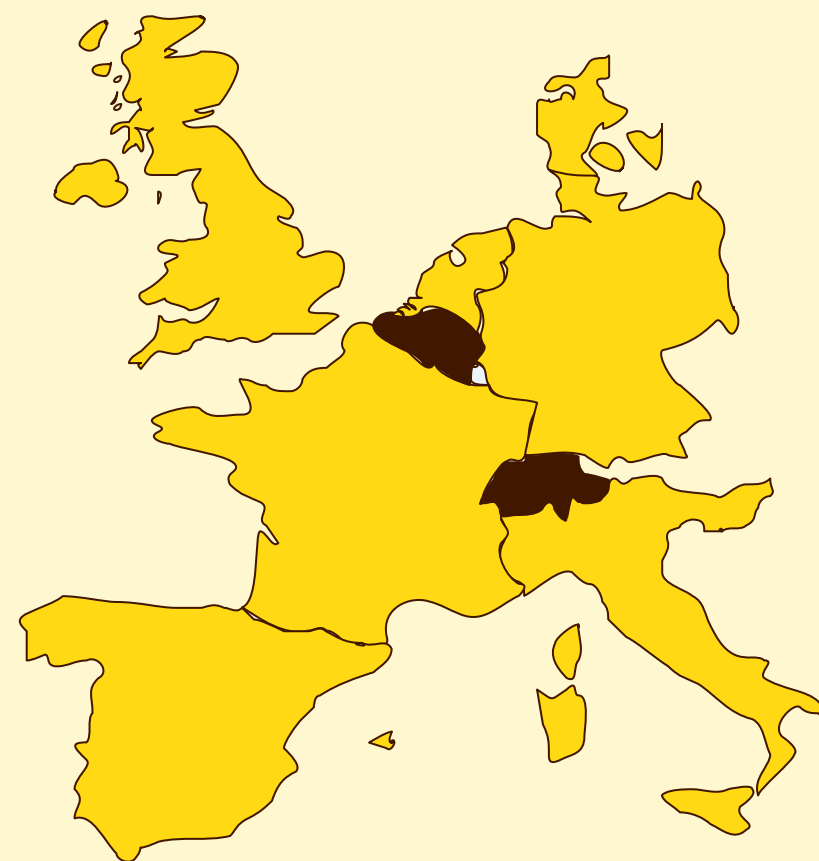
Facility



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

2025

Network

- **406 stations** by year end (60 new stations), within guidance of 400 - 425

Financial

- Revenues per station of €331k, meeting guidance of **>€325k in 2025**
- Operational EBITDA margin 35–40% **confirmed at 36%**

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 35% - 40% in 2026¹

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

A photograph of several wind turbines at sunset. The sky is a mix of purple, pink, and orange. The turbines are silhouetted against the bright sky. A yellow chevron points downwards towards the text. The text 'Business update' is written in a bold, white, sans-serif font.

Business update

Q1 2026 Highlights

+40% YoY

€39.2m

Revenues related to charging

+32% YoY

55.6GWh

Energy delivered

+28% YoY

2.1m

Sessions handled

+32% YoY

50.3kt

CO₂e¹ avoided

+63% YoY

€32.1m
(€0.58/kWh)

Gross profit related to charging

414

Operational stations

+26

High traffic locations signed

€95.5m

Cash position

24%

BEV fleet growth²

21%

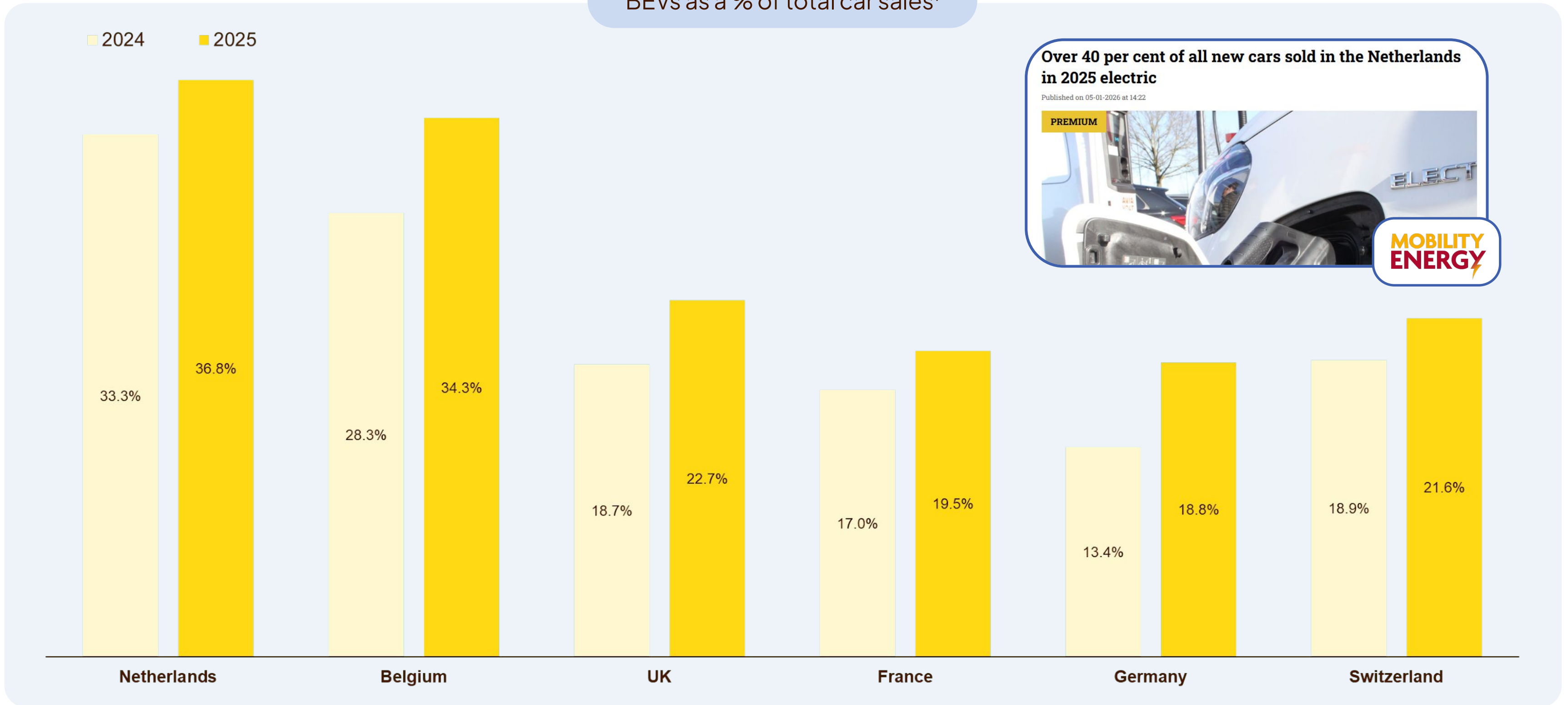
YoY organic sales growth

Note: All Q1 figures are unaudited and may be subject to change. 1) CO2 equivalent. 2) Station weighted BEV fleet as at February 2026 vs 2025



BEV sales in Fastned's key markets continue to grow

BEVs as a % of total car sales¹



Over 40 per cent of all new cars sold in the Netherlands in 2025 electric
Published on 05-01-2026 at 14:22

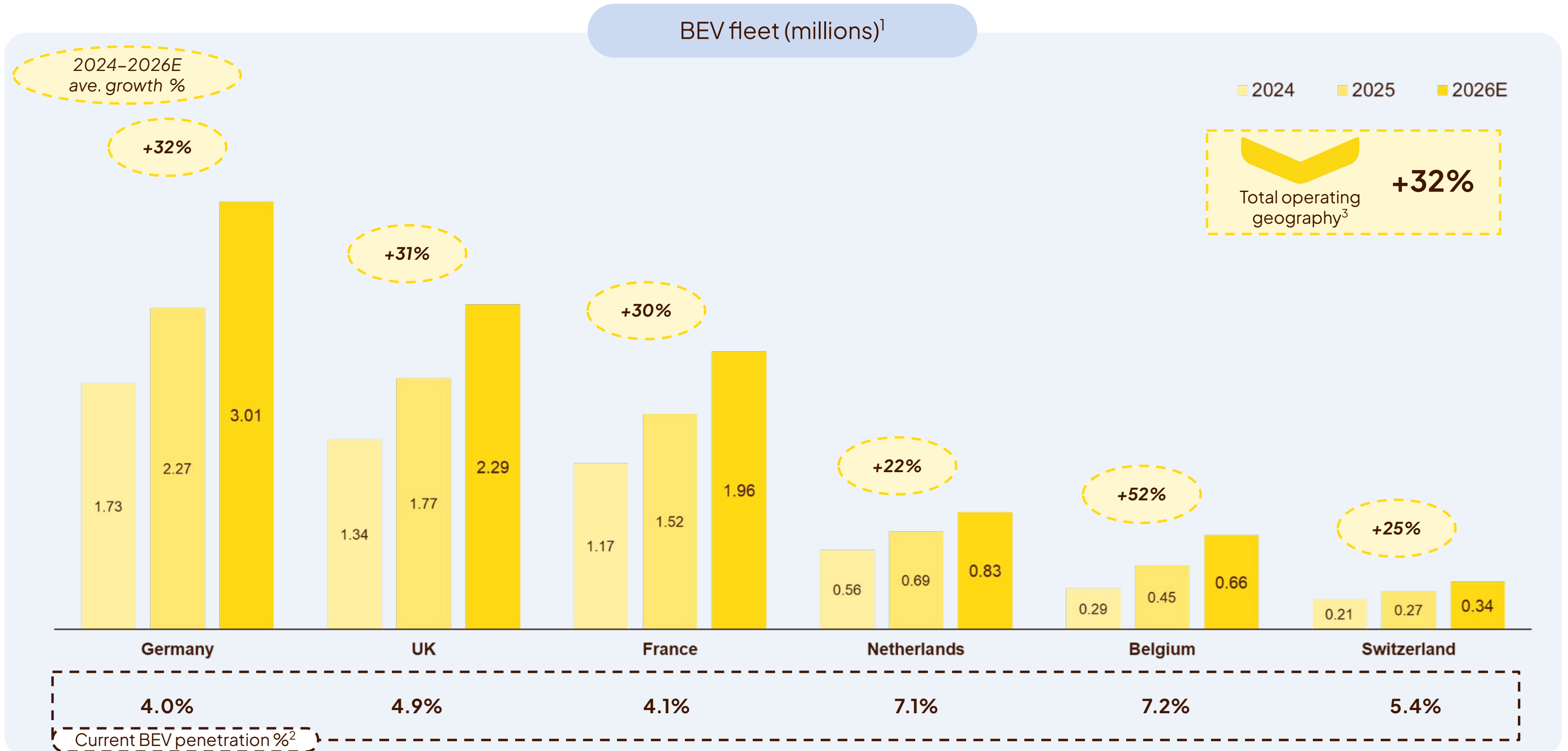
PREMIUM

MOBILITY ENERGY

1) Source: ACEA, Jan-Nov data, [MobilityEnergy](#)



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

CFO

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

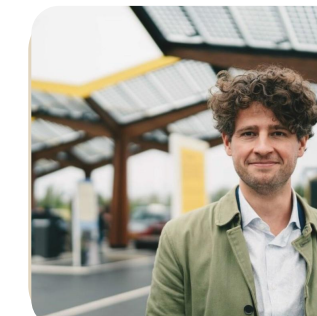
Previously: Philips, Swapfiets, Sanoma



Matt Ersin

Director Government & Public Affairs

Previously: Euromed



Albert den Boogert

Director of Growth

Previously: BCG

A photograph of a wind farm at sunset. The sky is a mix of purple, pink, and orange. Several wind turbines are visible, with their blades blurred from motion. A large yellow chevron points downwards towards the text. The text is centered and reads "Appendix B Network & Pipeline".

Appendix B
Network & Pipeline



400+ operational stations across 9 geographies

414

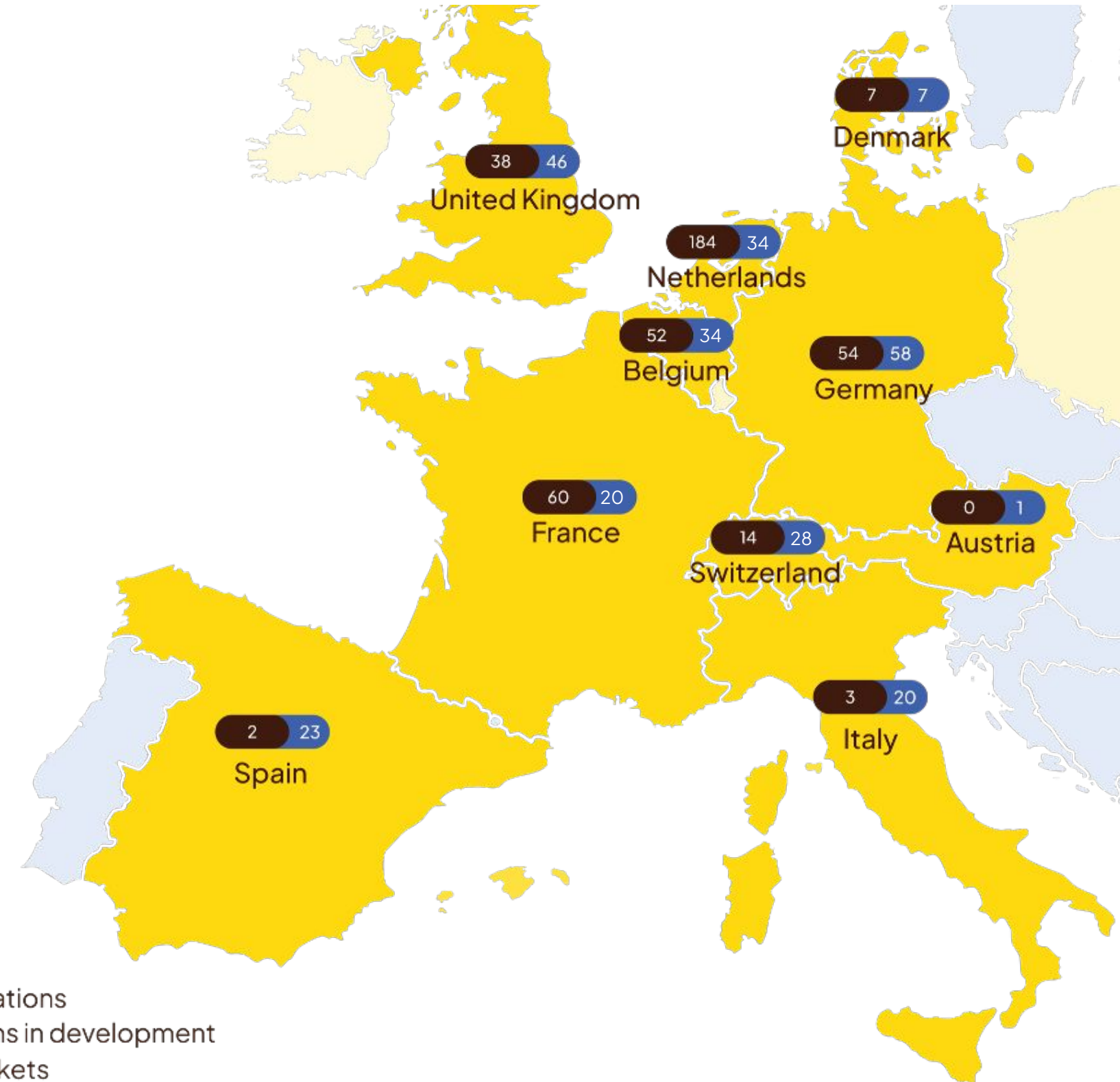
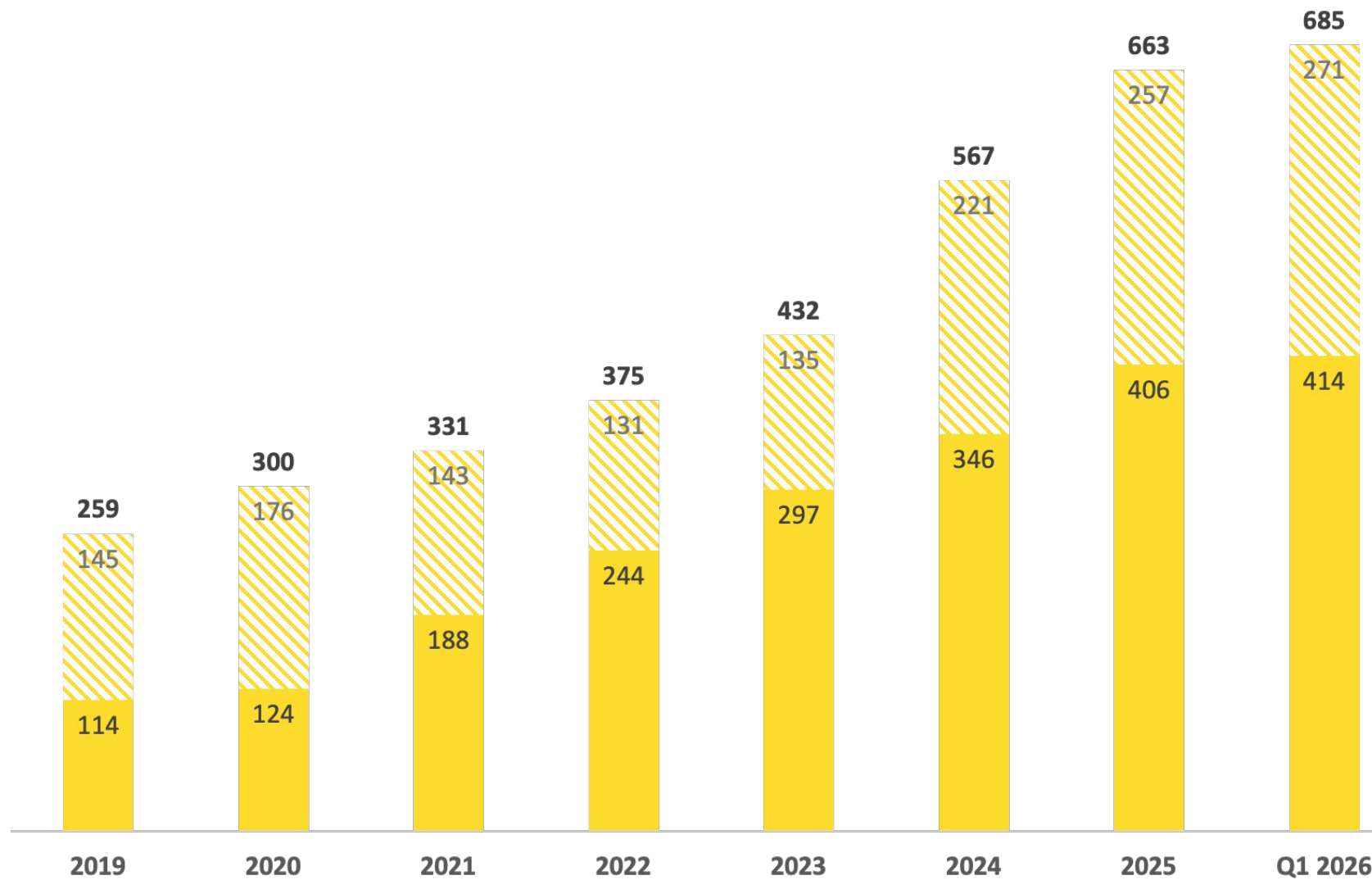
Stations in operation

685¹

Total secured locations

Historical station pipeline

■ Operational ▨ Secured












- 414 Open stations
- 271 Locations in development
- 2 Target markets

1) 4 sites were discontinued during Q1 2026.



Pioneering the way with **2,708 chargers** across our scalable network

	300kW+	150-200kW	50kW	Total
	956	207	19	1,182
	301	24	-	325
	347	4	4	355
	453	-	-	453
	204	13	20	237
	60	-	-	60
	64	-	-	64
	16	-	-	16
	16	-	-	16
Total	89%	9%	2%	100%





Appendix D
Financial



Fastned revenue potential



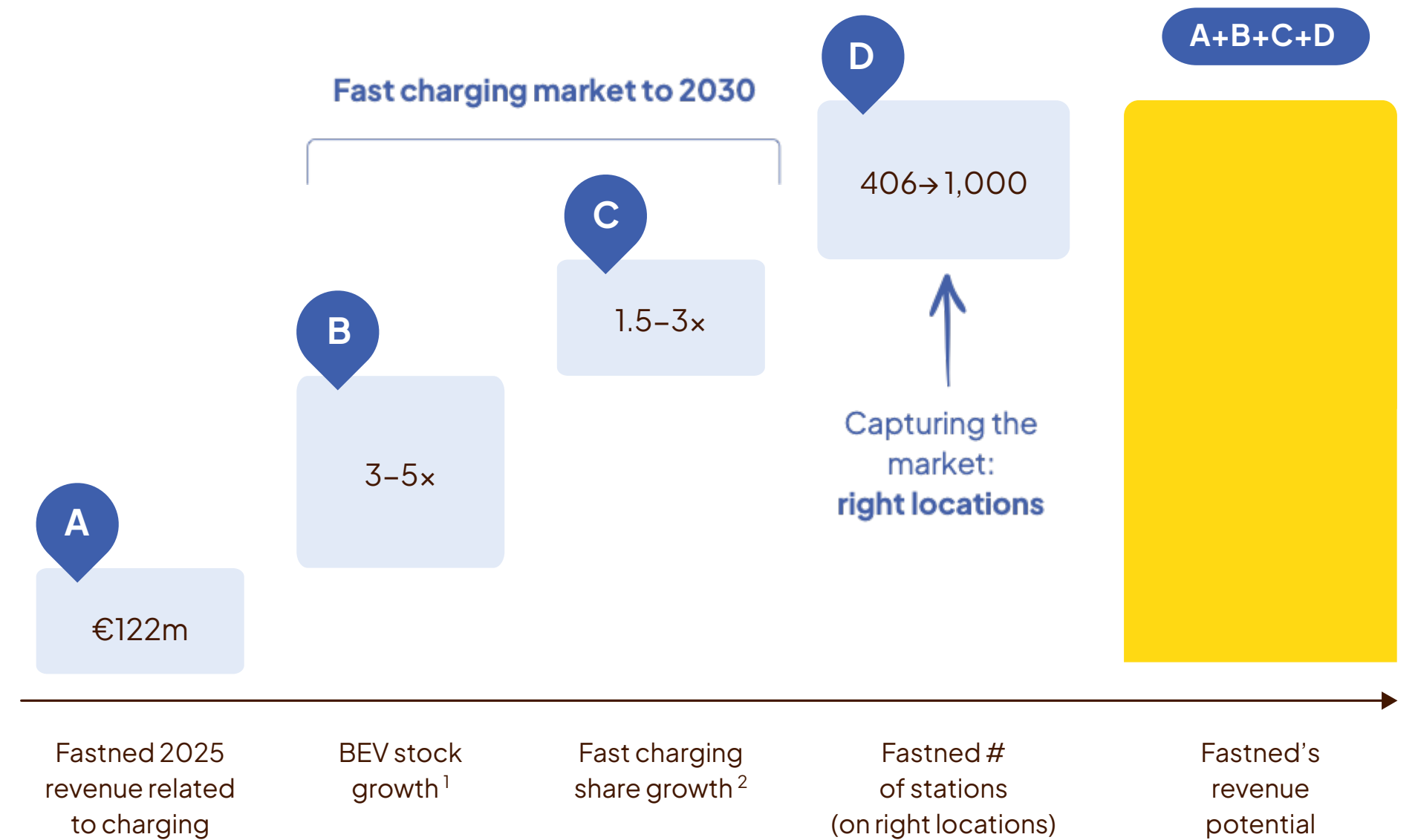
BEV stock growth x Fast charging growth
x Right location growth

- ✓ 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



Sources: 1-Derived from Schmidt Automotive research forecasts | 2-Derived from company analysis.



In Q1 we reported our **2025 full year figures** : Revenue growth of 47% with continued positive EBITDA

Top line figures excluding German Highway tender

€ million	YoY %	2025 ¹	2024 ²	2023
1 Revenues related to charging	47%	122.4	83.4	60.5
2 Gross profit related to charging	40%	96.2	68.5	44.9
Gross profit per kWh (€)	8%	0.53	0.49	0.45
Network operation costs	47%	(52.5)	(35.8)	(21.1)
Network operation costs per charger (€k)	20%	22.6	18.9	14.0
Operational EBITDA	34%	43.7	32.6	23.8
Operational EBITDA margin		36%	39%	39%
Network expansion costs	48%	(34.3)	(23.2)	(15.2)
3 Underlying company EBITDA	(4%)	8.3	8.7	7.8
Exceptional items (2025: mainly German highway tender)		6.5	(1.3)	(3.2)
EBITDA	100%	14.8	7.4	4.6
Net profit		(30.3)	(26.6)	(19.3)
Operating cash flow (excl. German highway tender)		(7.1)	(7.6)	(3.1)
4 Investing cash flow (incl. German highway tender)		(100.0)	(68.0)	(66.8)
Cash and cash equivalents at 31 December		69.9	117.4	126.6

- 1 Strong organic and inorganic revenue growth**
Fastned has two big revenue growth drivers:
 - **Organic volume growth, at +18.7% YoY** in 2025, at the 297 stations operational at 1 January 2024.
 - **Inorganic growth through new station openings, at +11.4% YoY** in 2025, with 109 stations opened since 1 January 2024.
- 2 Significant YoY increase in Gross profit and Operational EBITDA**
 - Doubling since 2023 (more or less), showing strong momentum
 - Network operating costs per charger still grew in 2025, reducing the Operational EBITDA margin, but these costs are to stabilise in 2026
- 3 Underlying EBITDA positive and stable year-on-year**
 - Fastned remains one of the few charging companies with positive EBITDA
 - Underlying EBITDA was stable year-on-year, due to rollout acceleration efforts last years and in 2026, where the effects will materialise in 2026 and next year
- 4 Cash level and funding programmes to fund 2026 capex**
We expect current cash level of 95.5 million, further retail bond issuance, bank financing and German tender funding to fund all of 2026 capex

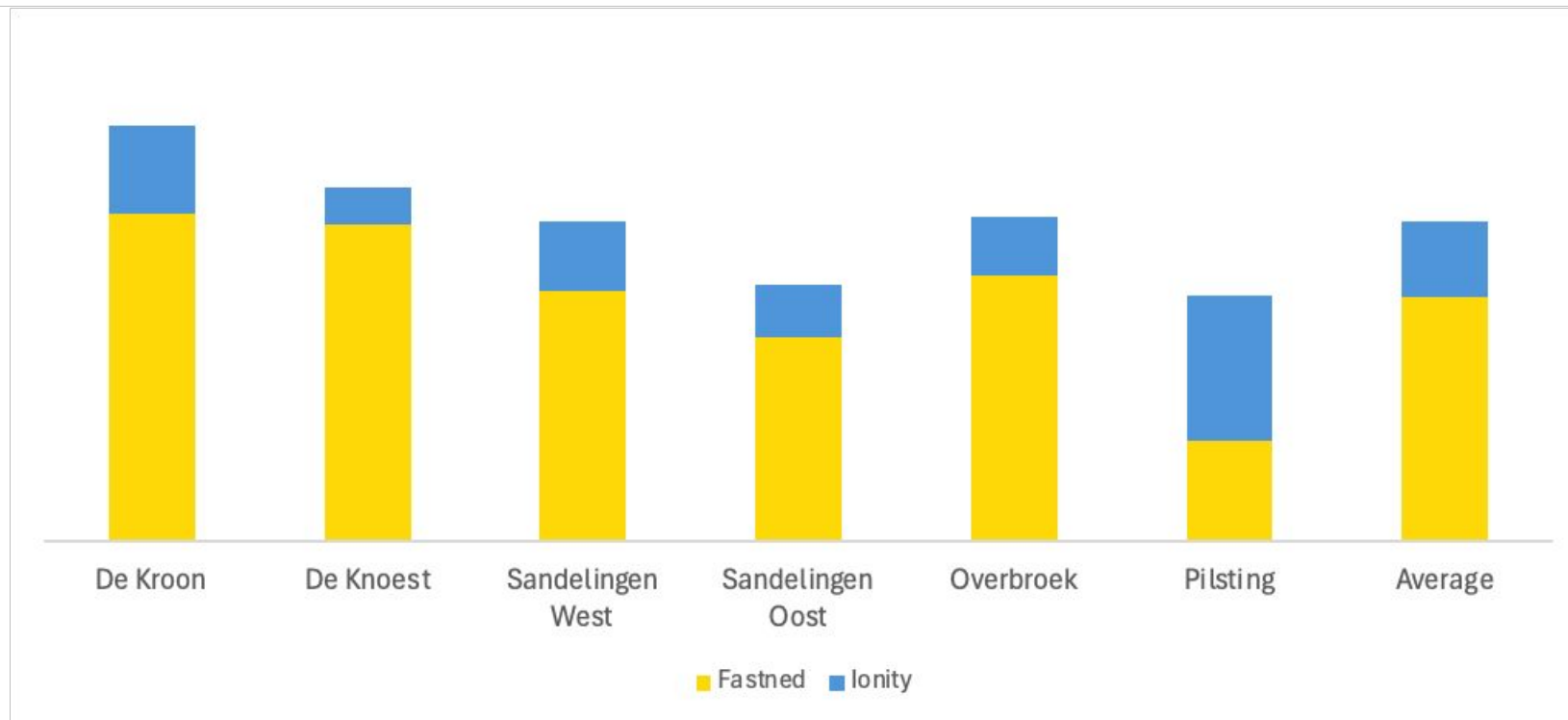
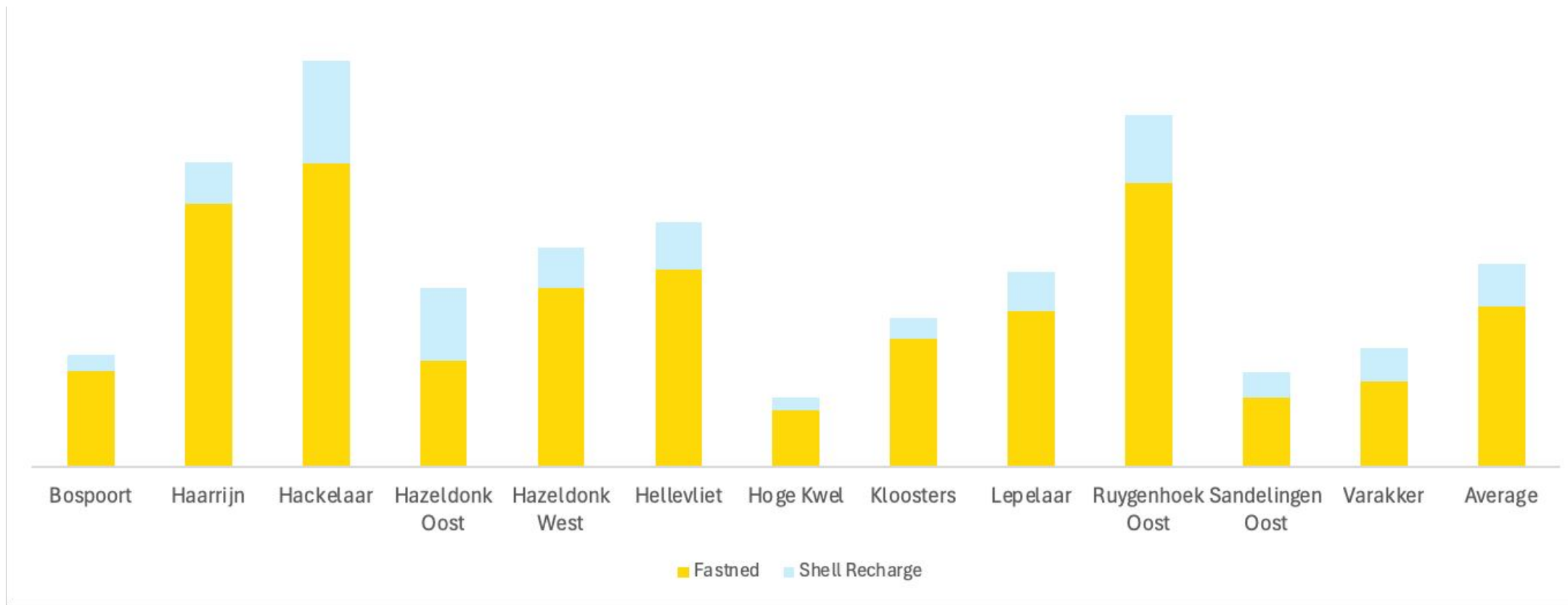
1. For more details refer to the 2025 Annual report. 2. 2024 figures are restated. Refer to Note 2 of the 2025 Annual Report for further details.

A photograph of several wind turbines at sunset or sunrise, with a yellow chevron pointing downwards. The sky is a mix of purple, pink, and orange, and the turbines are silhouetted against it. The text "Appendix E Competition" is overlaid in white.

Appendix E Competition



Outperforming competitors at co-locations¹

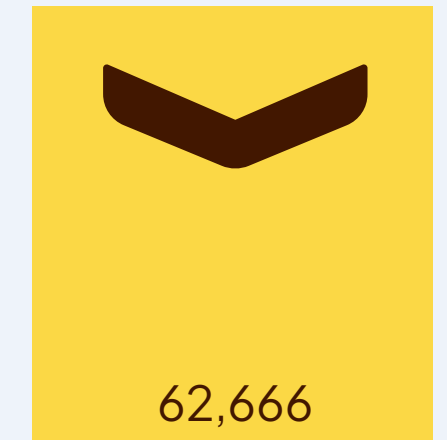


Case Study: 3x charging volumes at co-located Hackelaar stations with equal number of charging points

Total number of sessions in 2025



Shell



Fastned



1) Charging Radar

Outperforming competitor at Baraque de Fraiture co-location¹



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

Total number of sessions in 2025

IONITY
14,414

Ionity

Fastned
37,348

Fastned

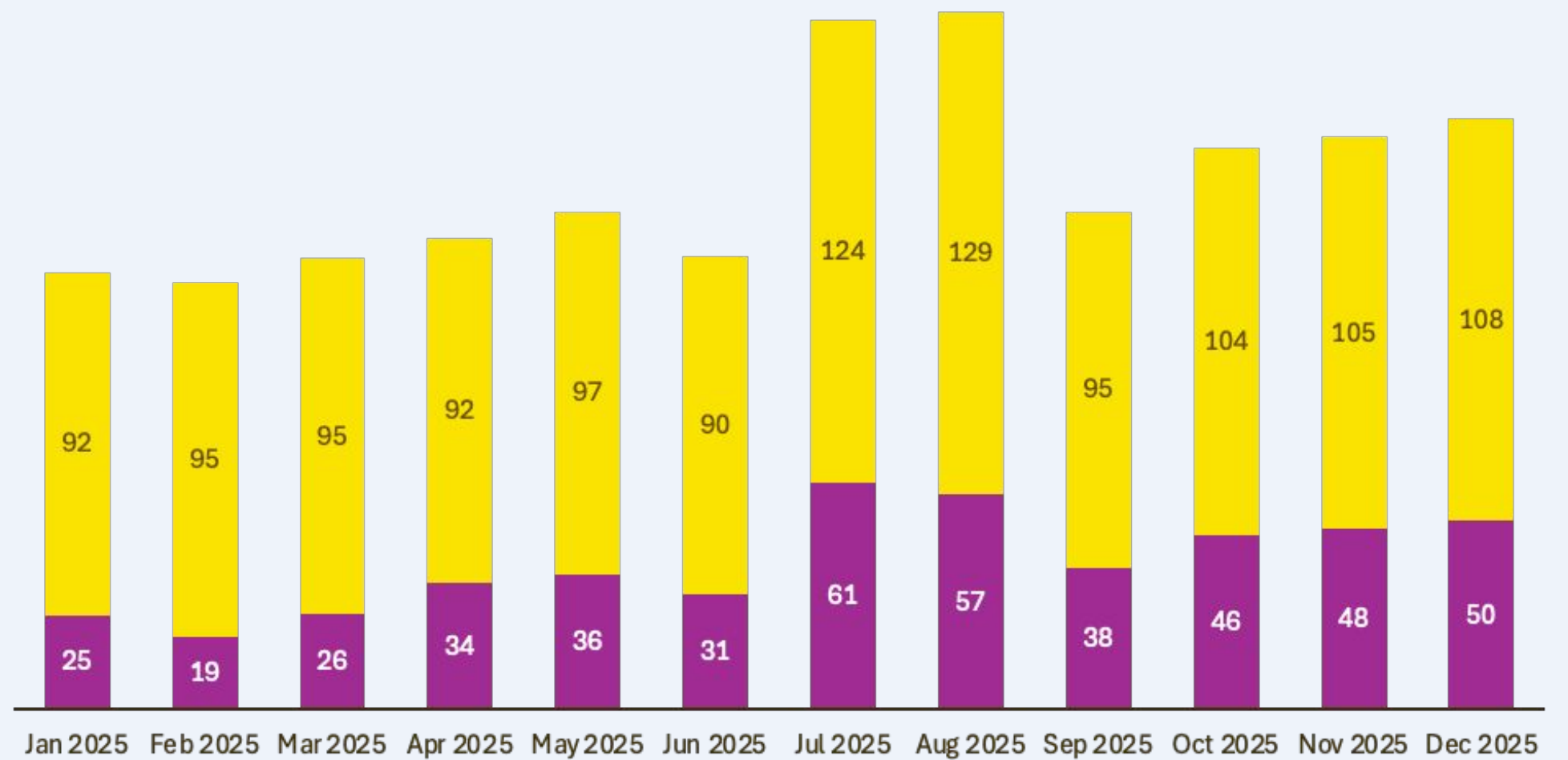


1) Charging Radar

Sessions per station per day (2025)

IONITY
12
chargepoints

Fastned
8
chargepoints





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

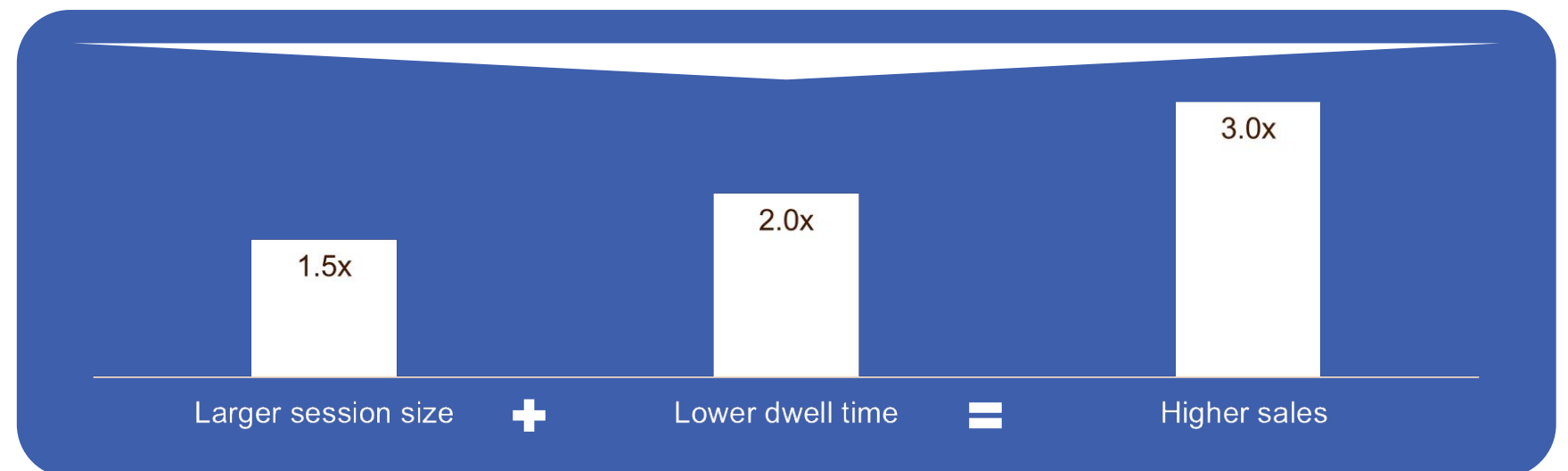
Because people will charge at MSAs when their battery is low, rather than their fridge being empty, State of Charge (SoC) is expected to be lower, increasing maximum potential session sizes

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



A photograph of several wind turbines at sunset or sunrise, with a yellow chevron pointing downwards. The sky is a mix of purple, pink, and orange, and the turbines are silhouetted against it. The text "Appendix F" and "BEV Market" is overlaid in white.

Appendix F
BEV Market

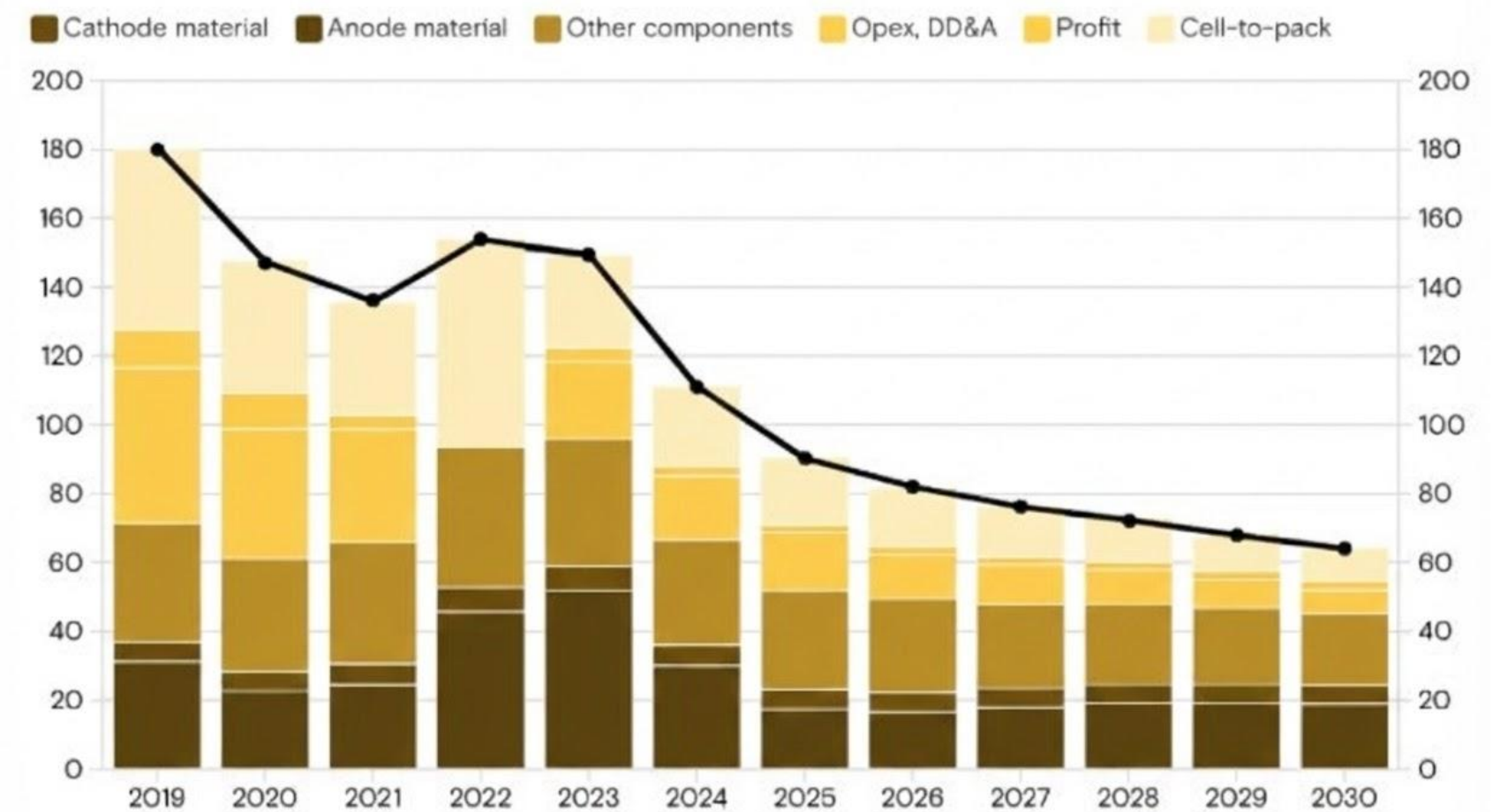


Long term BEV growth drivers in place

- 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...

Published: 21 Mar • Written By Oleg Korolev

BYD Showcases EV with 'Megawatt' Five Minute Charging Time

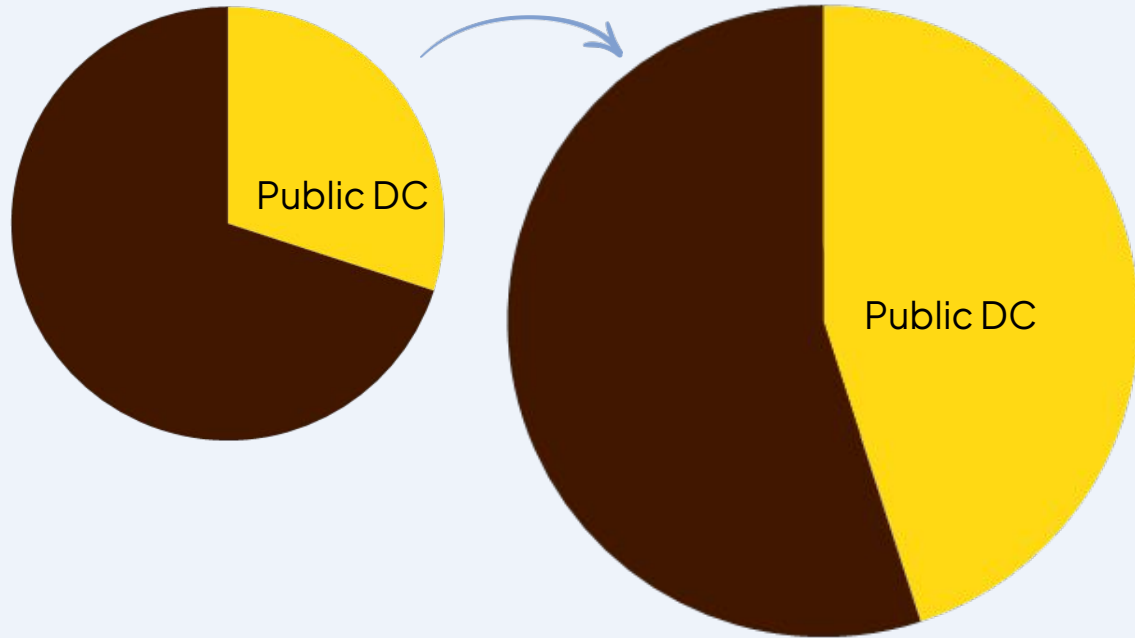


Chinese electric vehicle manufacturer BYD has introduced a new charging system that it claims could enable EVs to charge as quickly as it takes to refuel a petrol car.

- 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

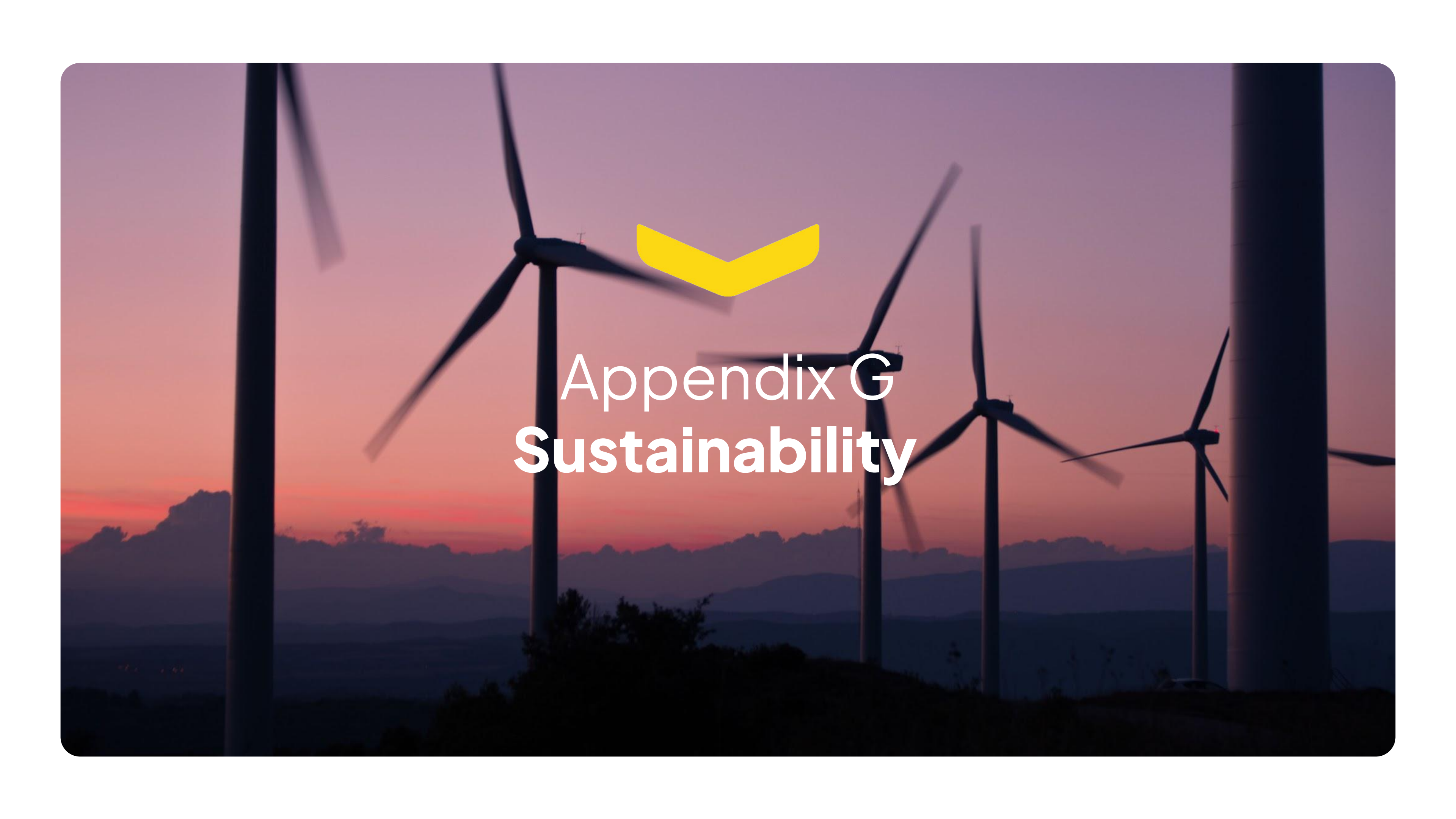
↓

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

A photograph of a wind farm at sunset. The sky is a mix of purple, pink, and orange. Several wind turbines are visible, with their blades blurred from motion. A large yellow chevron points downwards towards the text. The text "Appendix G Sustainability" is centered in white.

Appendix G
Sustainability



Improving ESG performance through fulfillment of roadmap milestones

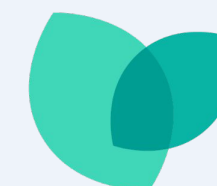
- ✓ Published first climate transition plan as part of CO2 Performance Ladder certification
- ✓ Completed a second limited assurance engagement on 5 ESG KPIs in 2025, as shared in 2025 annual report
- ✓ Scope 1, 2 and 3 emissions were a KPI verified through limited assurance engagement (mentioned above)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

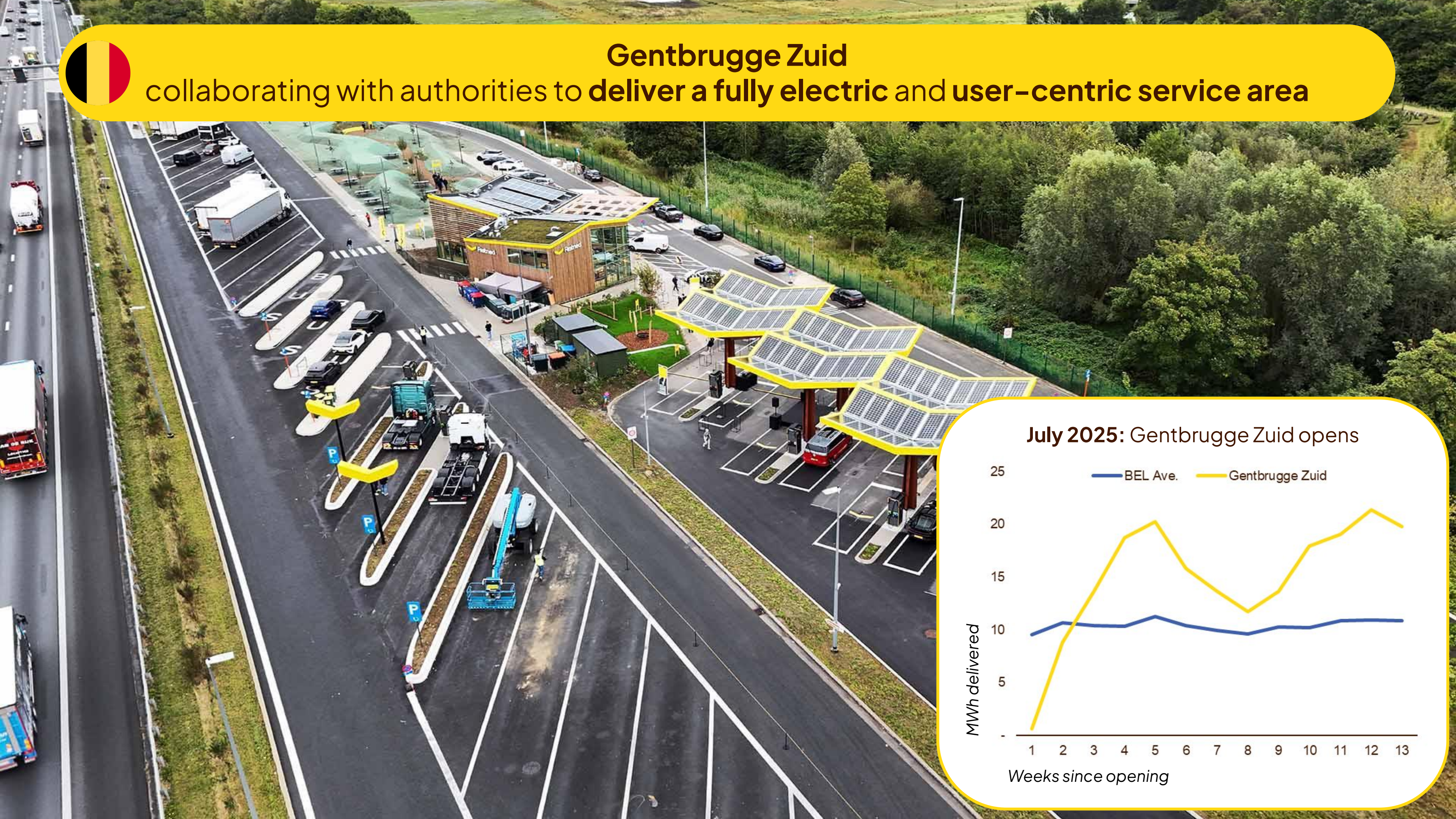
A photograph of several wind turbines at sunset or sunrise, with a yellow chevron pointing downwards. The sky is a mix of purple, pink, and orange, and the turbines are silhouetted against it. The text "Appendix H" and "Future Industries" is overlaid in white.

Appendix H
Future Industries

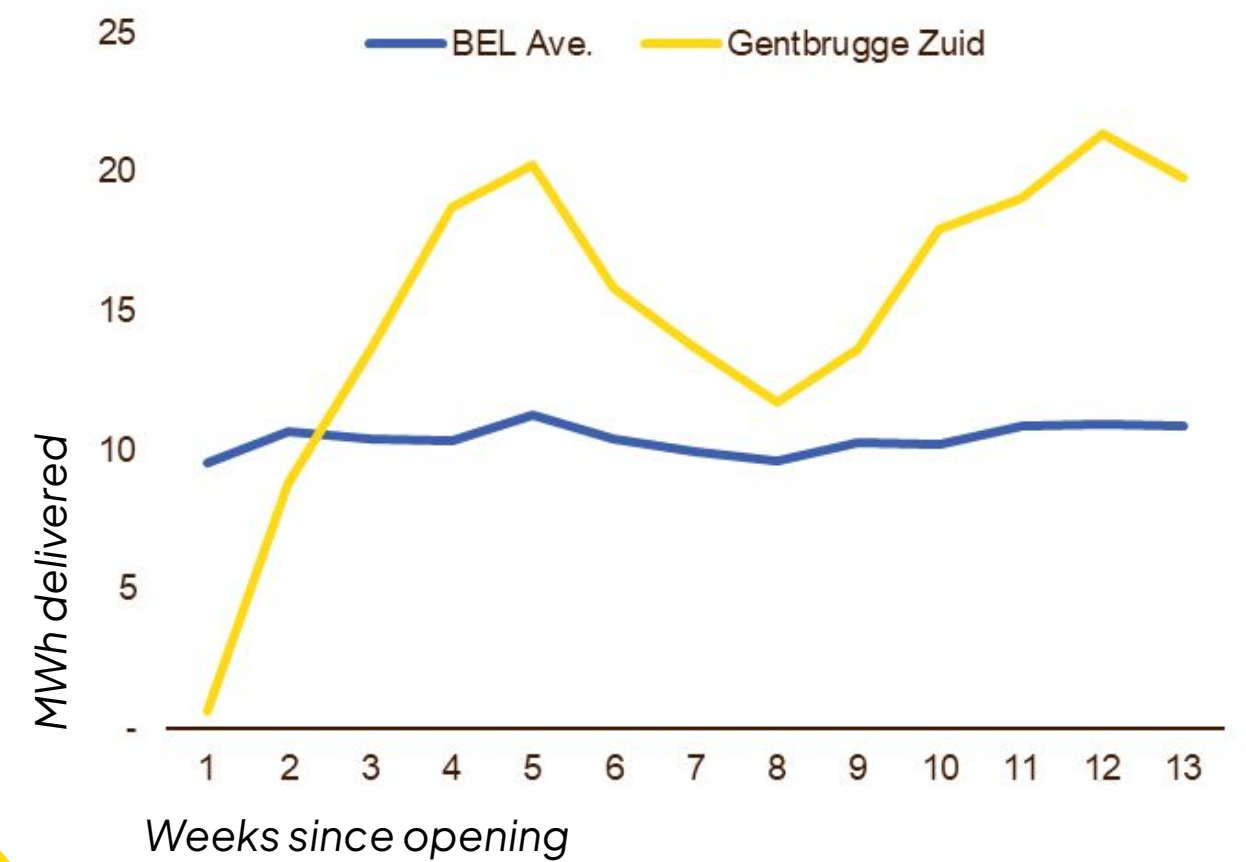


Gentbrugge Zuid

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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