



# Investor Presentation

January 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

2

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

3

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

4

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

5

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





# 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 energy<sup>1</sup>

2024 CO2e avoided

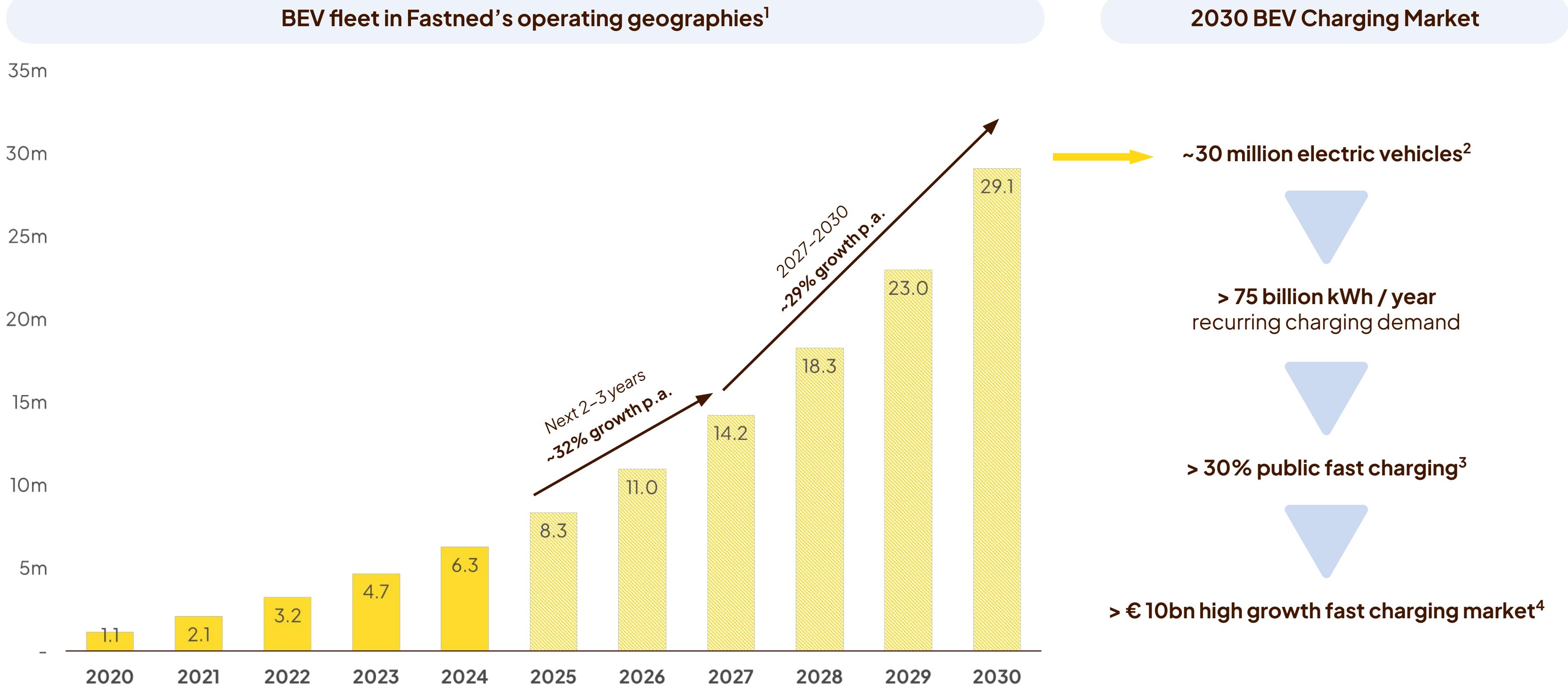
**129,100**  
tonnes



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



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>

2024 energy volume sold<sup>1</sup>

	Type	Main location strategy
<b>T E S L A</b>	Car manufacturer	Off highway (navigational pull)
<b>EnBW</b>	Utility	Destination charging
<b>Fastned</b>	Pure play	High traffic roads
<b>IONITY</b>	Car manufacturer	High traffic roads
<b>Allego</b>	Pure play	Off highway
<b>Shell Recharge</b>	Oil major	Adding chargers on petrol stations
<b>TotalEnergies</b>	Oil major	Adding chargers on petrol stations
<b>bp pulse</b>	Oil major	Adding chargers on petrol stations
<b>LIDL</b>	Location owner / operator	Destination charging
<b>GRIDSERVE</b>	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



Station design



Customer support



3

## Best customer experience

Construction & engineering



Operations & maintenance



Software backbone & app



**99.9%**

station uptime

**Google**

**4.4 / 5**

Google location reviews

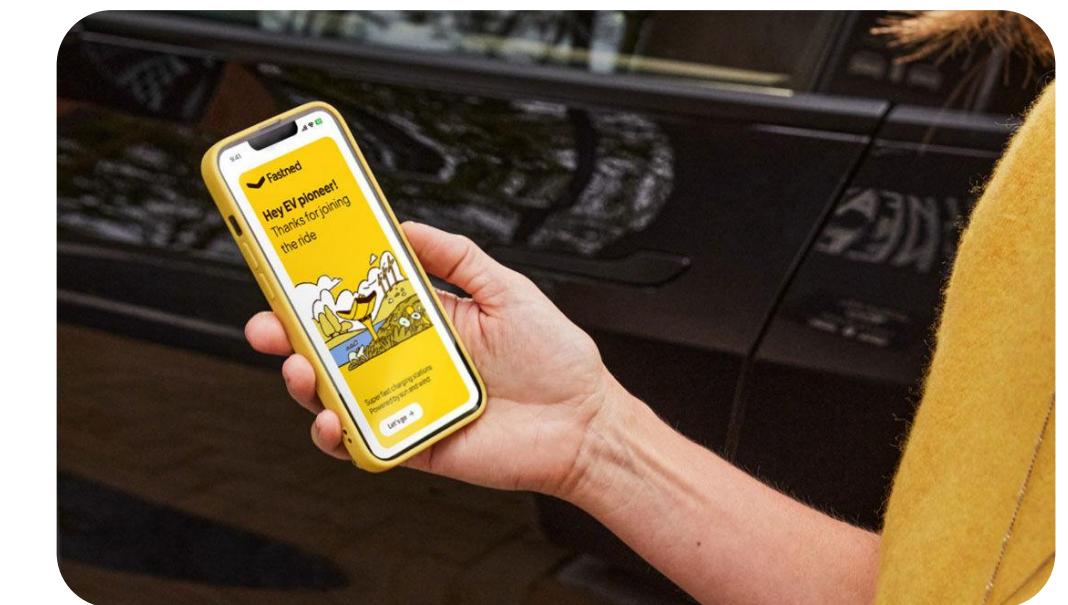
**65**

customer NPS

**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 survey<sup>1</sup>

% favourite

1	<b>Fastned</b>	43%
2	<b>TESLA</b>	31%
3	<b>IONITY</b>	15%
4	<b>Other</b>	4%
5	<b>Shell Recharge</b>	4%
6	<b>Allego</b>	1%
7	<b>TotalEnergies</b>	1%
8		
9		
10		

1) Autoflow charging network survey 2024  
2) Zapmap best charging networks of 2025

**zapmap**



Best EV Charging Network 2025<sup>2</sup>

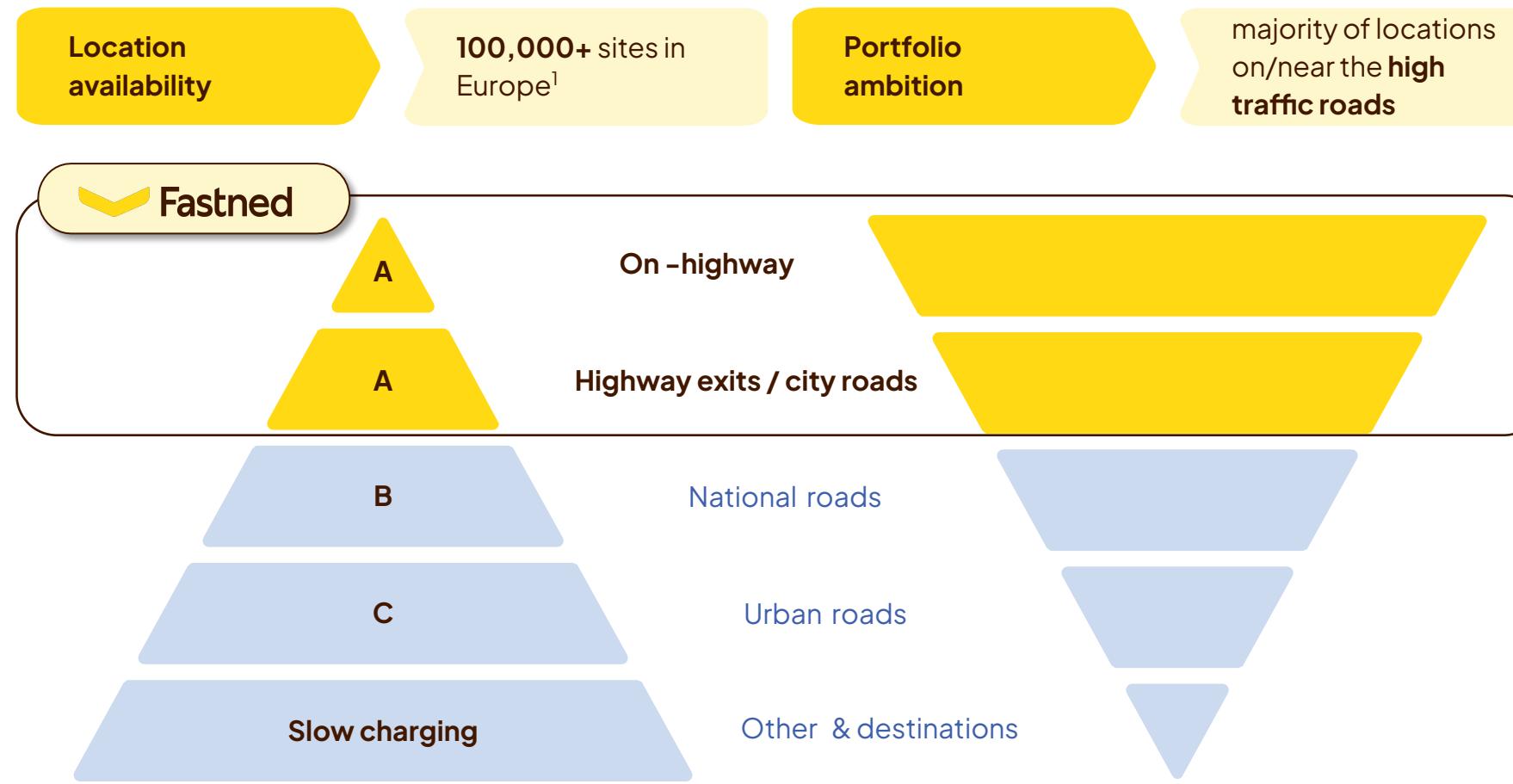
5-star rating

<b>TESLA</b>	4.8
<b>Smart Charge</b>	4.4
<b>Be.EV</b>	4.3
<b>Fastned</b>	4.2
<b>mfg EVPOWER</b>	3.9
<b>IONITY</b>	3.8
<b>Osprey</b>	3.8
<b>INSTAVOLT</b>	3.6
<b>EV on the move</b>	3.6
<b>GRIDSERVE</b> SUSTAINABLE ENERGY	3.5



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

## Fastned focuses on high-traffic A-locations

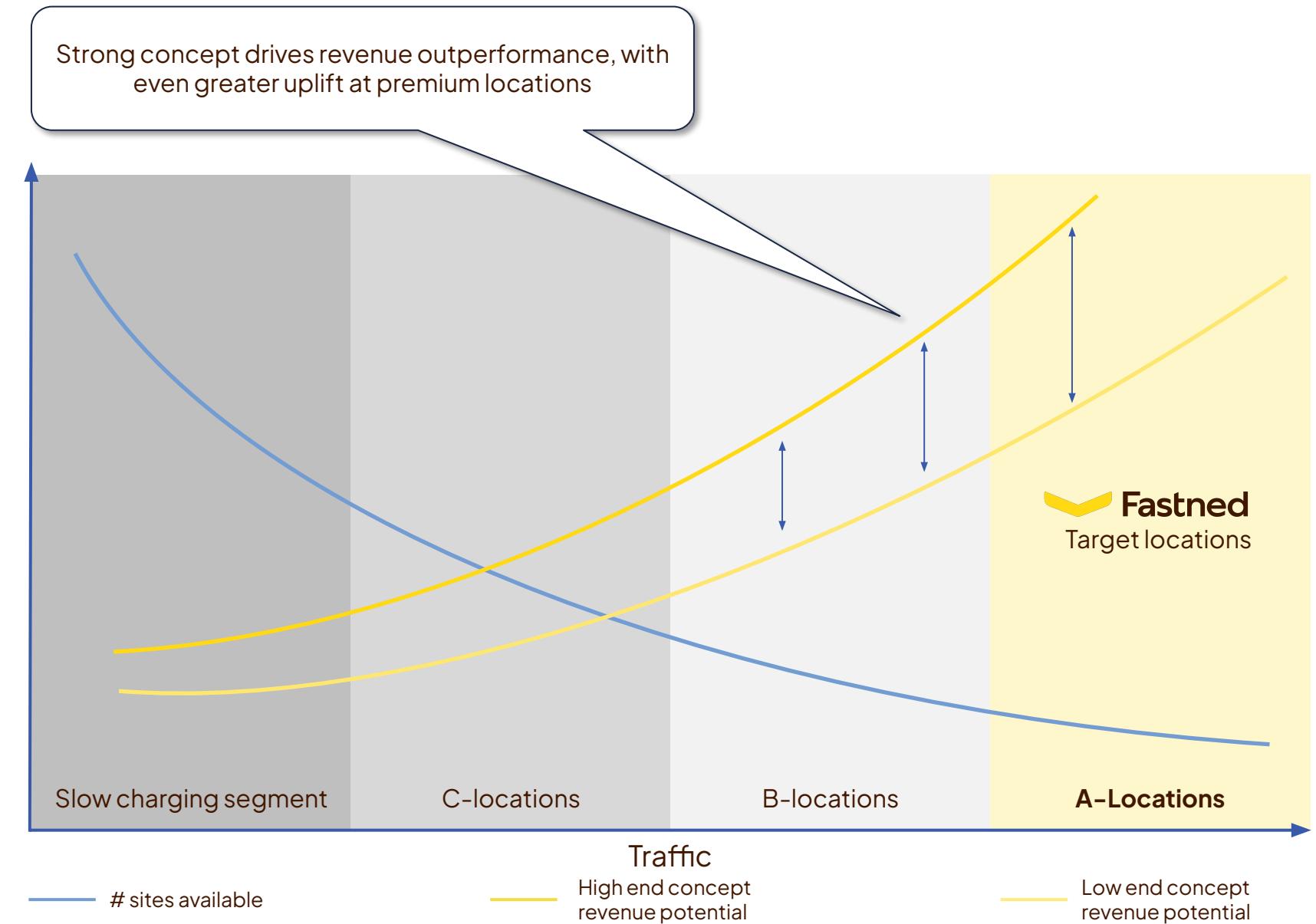


Fastned strengthens its strategic position by:

- 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

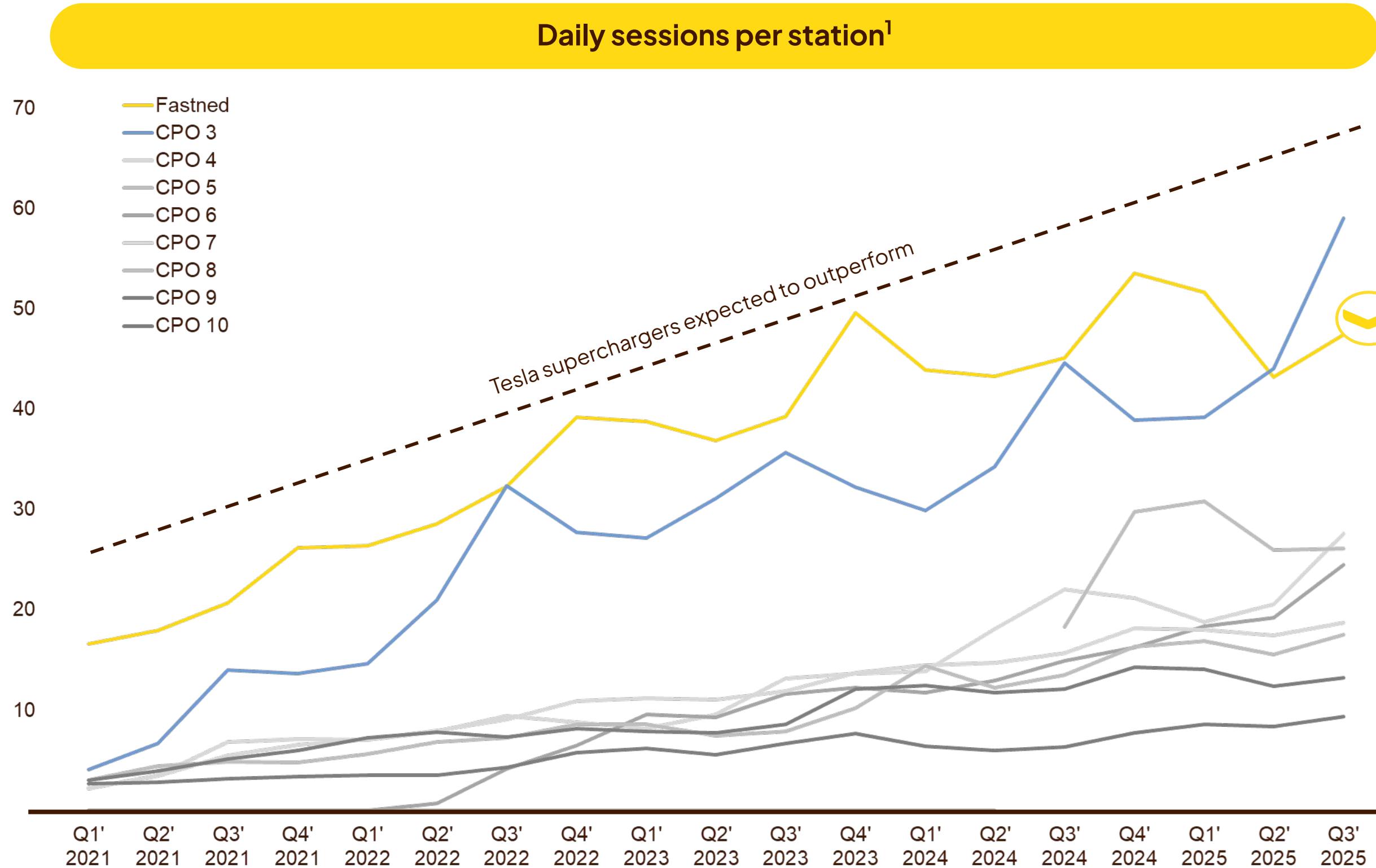
Note: 1. 10,000+ with a great business case

## Location strategy leads to highest revenue potential

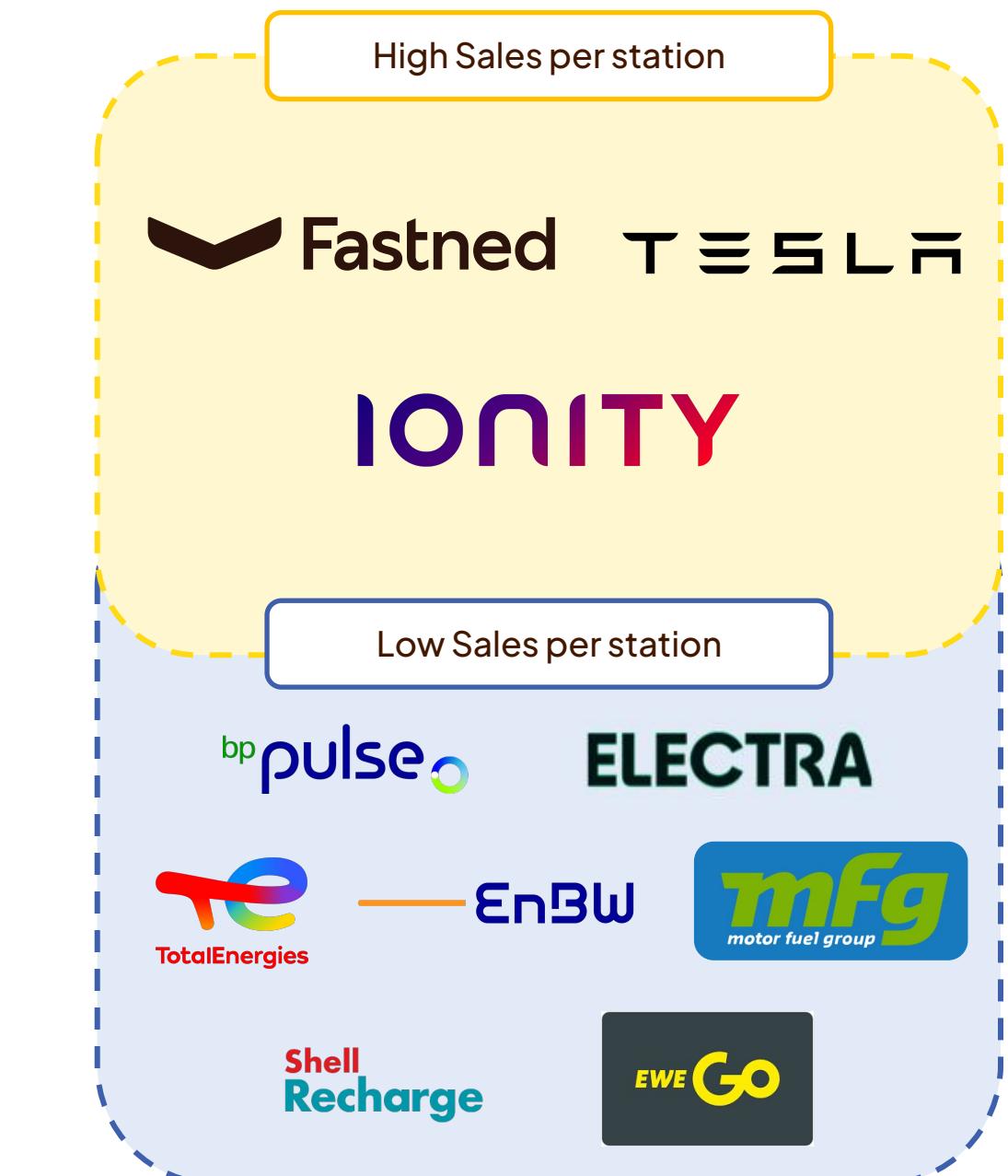




# A high traffic location strategy and best-in-class charging concept leads to outsized sessions per station



<sup>1</sup>) 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 economics

€k	Average station <b>Q4 2019</b>	Average station <b>Q4 2025</b>	Average station <b>2030</b>
Average daily traffic	~30k	~30k	~30k
<b>1</b> BEV fleet penetration	~0.9% <sup>1</sup>	~6.0% <sup>1</sup>	~20% <sup>1</sup>
<b>2</b> Sessions per day	14	57	
<b>Average MWh</b> (Annualised)	<b>105 MWh</b>	<b>552 MWh</b>	<b>&gt;2,000 MWh</b>
Annualised revenue / station	61 <sup>2</sup>	385 <sup>2</sup>	>1,000 <sup>2</sup>
<b>3</b> Gross margin	51(€0.49/kWh)	300 (€0.54/kWh)	
Operating costs per station	31	142 <sup>4</sup>	
<b>Operational EBITDA (B)</b>	<b>20 (33%)</b>	<b>158 (42%)</b>	<b>&gt;400 (40%)</b>
<b>4</b> Initial investment (A) <sup>4</sup>	307	892	
<b>ROIC (= B / A)</b>	<b>7%</b>	<b>18%</b>	
Utilisation rate <sup>5</sup>	9.9%	14.6%	
ROIC at 30% utilisation, current charge speed	>40%	>40%	

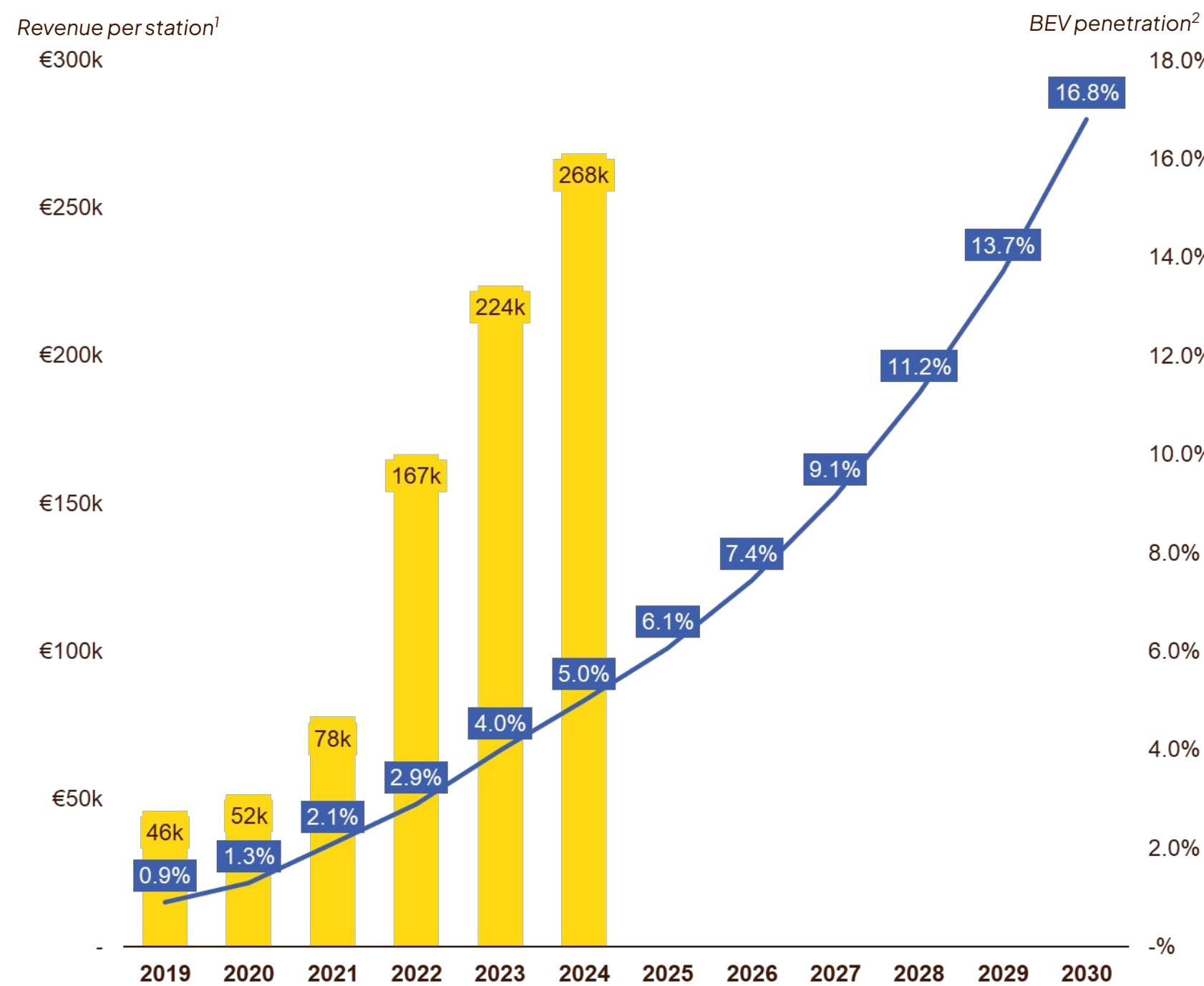
- 1 Top line growth is directly linked to BEV adoption – large revenue tailwinds
- 2 Best-in-class charging concept captures more traffic resulting in higher number of sessions vs peers
- 3 Outsized session numbers lead to a superior business case which allows price flexibility
- 4 Fully wrapped construction capability delivers high quality and capex efficient infrastructure

Note: Q4 figures are unaudited and may be subject to change 1) Average across Fastned countries, weighted by the number of stations in each country, 2) Annualised revenue related to charging for the period, 3) based on €18.9k per charger for 2024, 3) based on €22.2k per charger for H125. 4) Non-depreciated PP&E relating to charging stations, including Right of Use assets. Q4 2024 and Q4 2025 figures are as at 30 June 2024 and 2025 respectively. 5) Time-based utilisation calculated as = (average session duration (hrs) \* average sessions per day) / (number of chargers \* 24 hours).

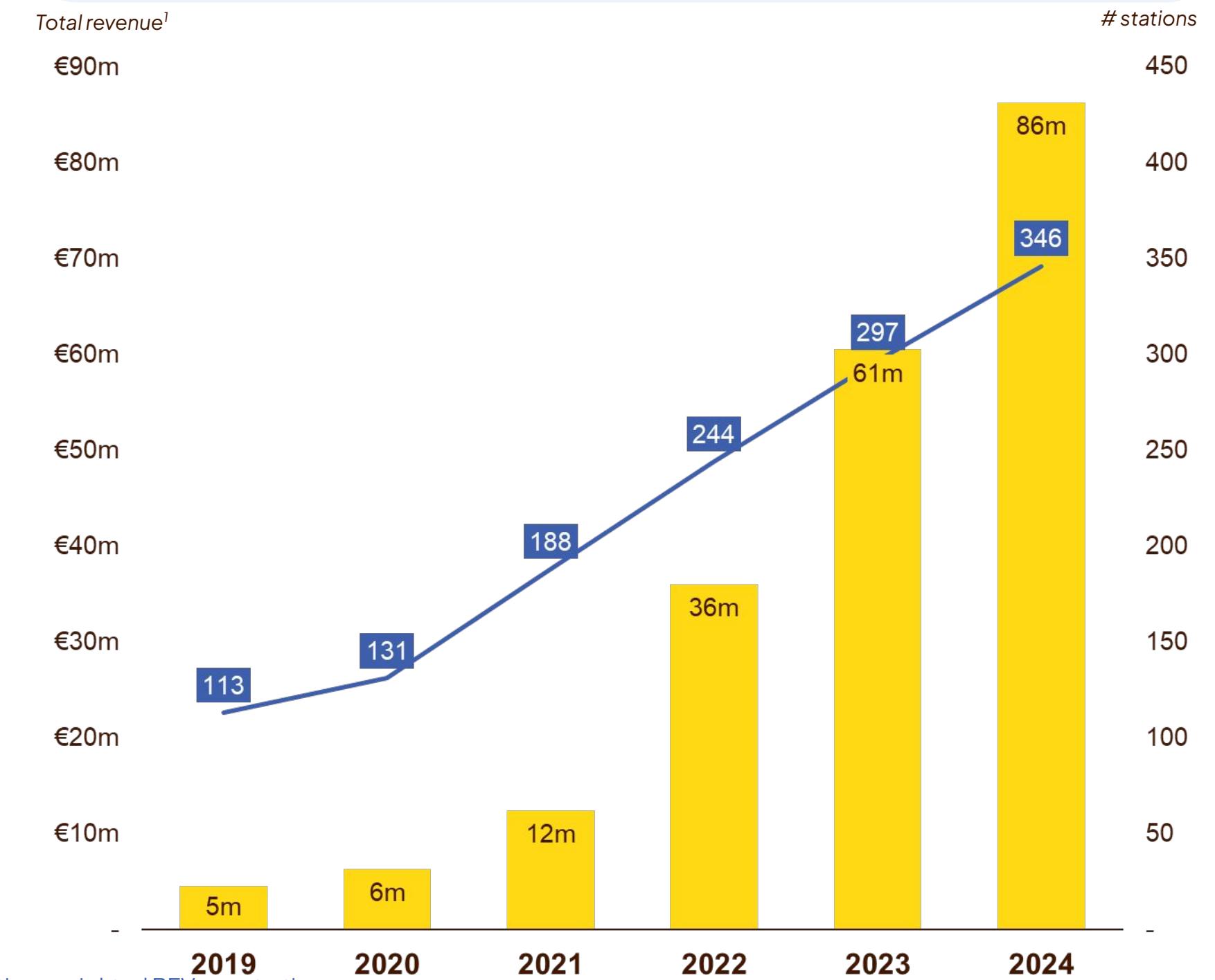


# Fastned's top line has grown considerably - driven organically by BEV adoption and inorganically by building new stations

## Organic growth through high traffic locations & BEV penetration growth



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





# We expect the retail bond platform to fund a large part or all of the 2026 rollout

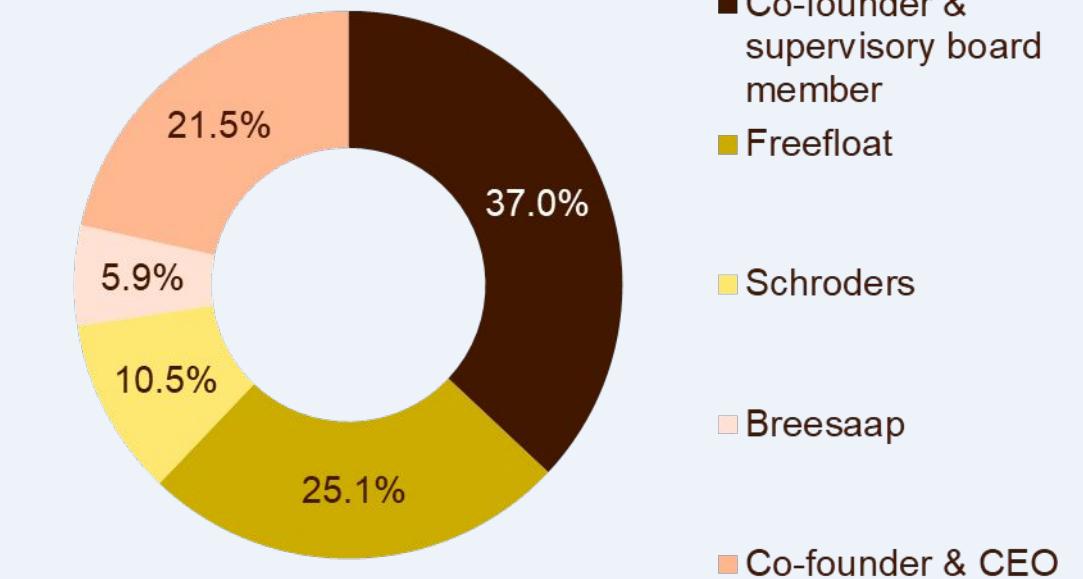
## Funding to date:

- ✓ **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:** >€ 270 million in retail bond funding
- ✓ **Cash level:** Current cash level of €87m (September 2025)

## Current funding



## Shareholding structure





## Guidance & outlook

### Network

- 400 to 425 stations operational by year end 2025
- Target of 1,000 stations before 2030

### Financial

- Revenue / station >€325k in 2025 and >€1m in 2030
- Operational EBITDA margin 35% - 40% by 2025<sup>1</sup>

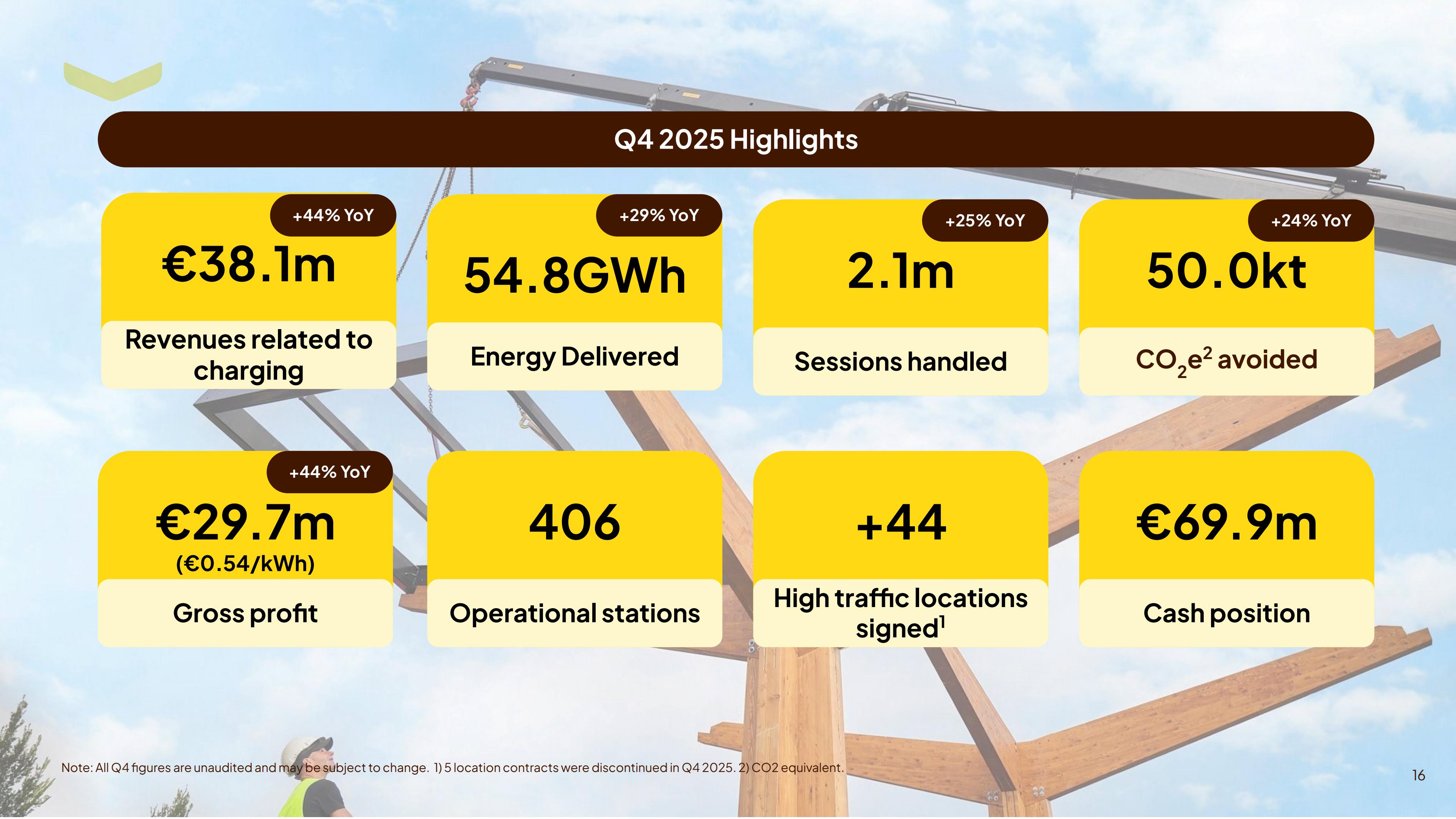
<sup>1)</sup> Before (positive) EBITDA impact from the German highway tender



Business update



## Q4 2025 Highlights



**€38.1m**

+44% YoY

Revenues related to  
charging

**54.8GWh**

+29% YoY

Energy Delivered

**2.1m**

+25% YoY

Sessions handled

**50.0kt**

+24% YoY

CO<sub>2</sub>e<sup>2</sup> avoided

**€29.7m**

(€0.54/kWh)

Gross profit

+44% YoY

**406**

Operational stations

**+44**

High traffic locations  
signed<sup>1</sup>

**€69.9m**

Cash position



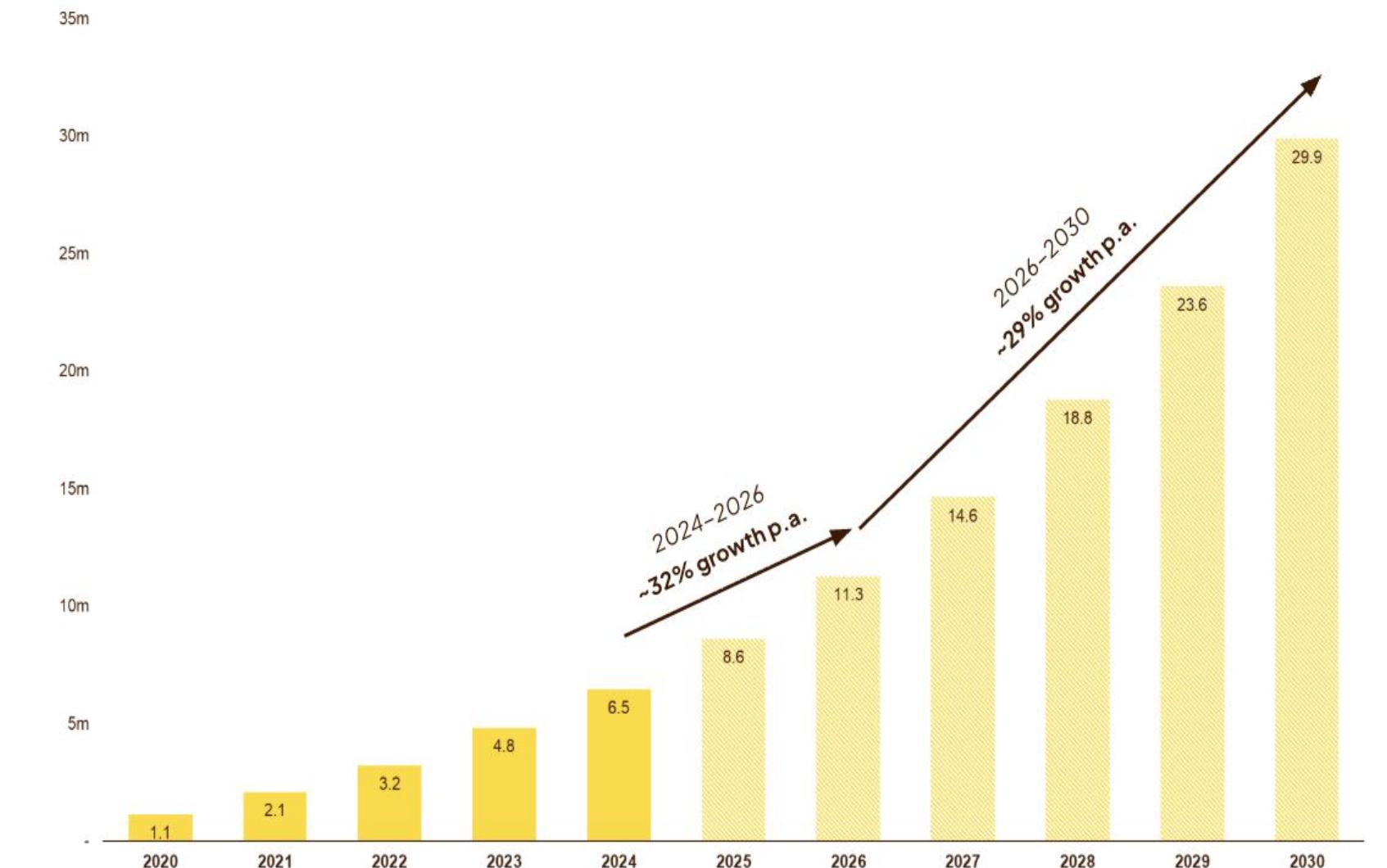
# 2035 Automotive Package – diluted targets will have a marginal impact on BEV market dynamics in the long run

## Main elements of the European Commission's Automotive Package

- 1** A 10% conditional emission allowance in 2035: low carbon steel (7%) and biofuels (3%).  
90% CO2 tailpipe emissions reduction target.
- 2** A reduction from 50% to 40% of the vans emissions target for 2030.
- 3** **Greening Corporate Fleets**  
Mandatory targets on zero and low emissions vehicles for big European companies (+250 employees).
- 4** **Battery Industry support of €1.8 billion** through interest-free loans.
- 5** **Small affordable European Cars Initiative.**
- 6** **Banking and borrowing:**  
OEMs may miss annual CO2 reduction targets in one year if fully compensated by over-compliance in another year within 2030-2032.

The EC's automotive package has been effective in supporting the early adoption of BEVs...

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

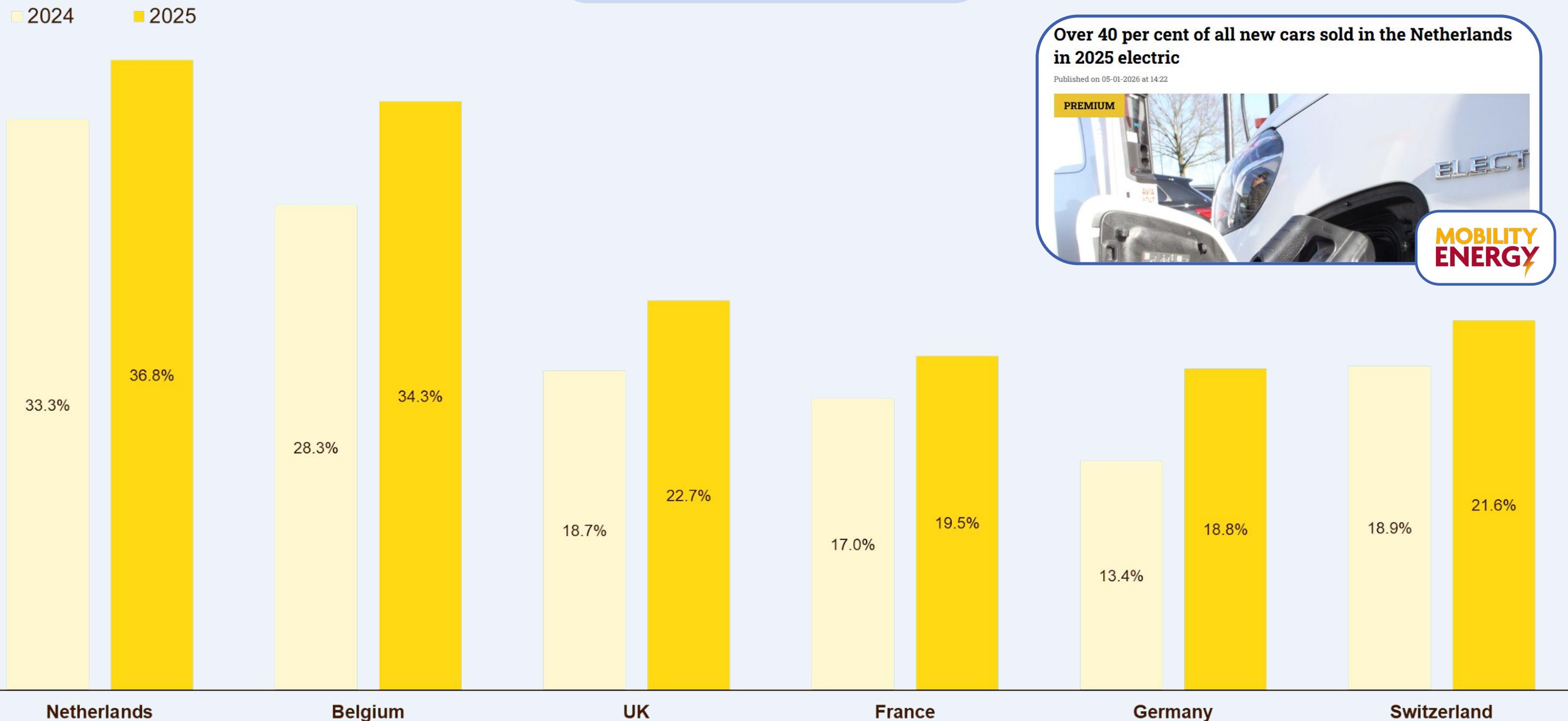


... but demand is now sustained by market dynamics, its incremental influence is limited in the long run.



# BEV sales in Fastned's key markets continue to grow

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



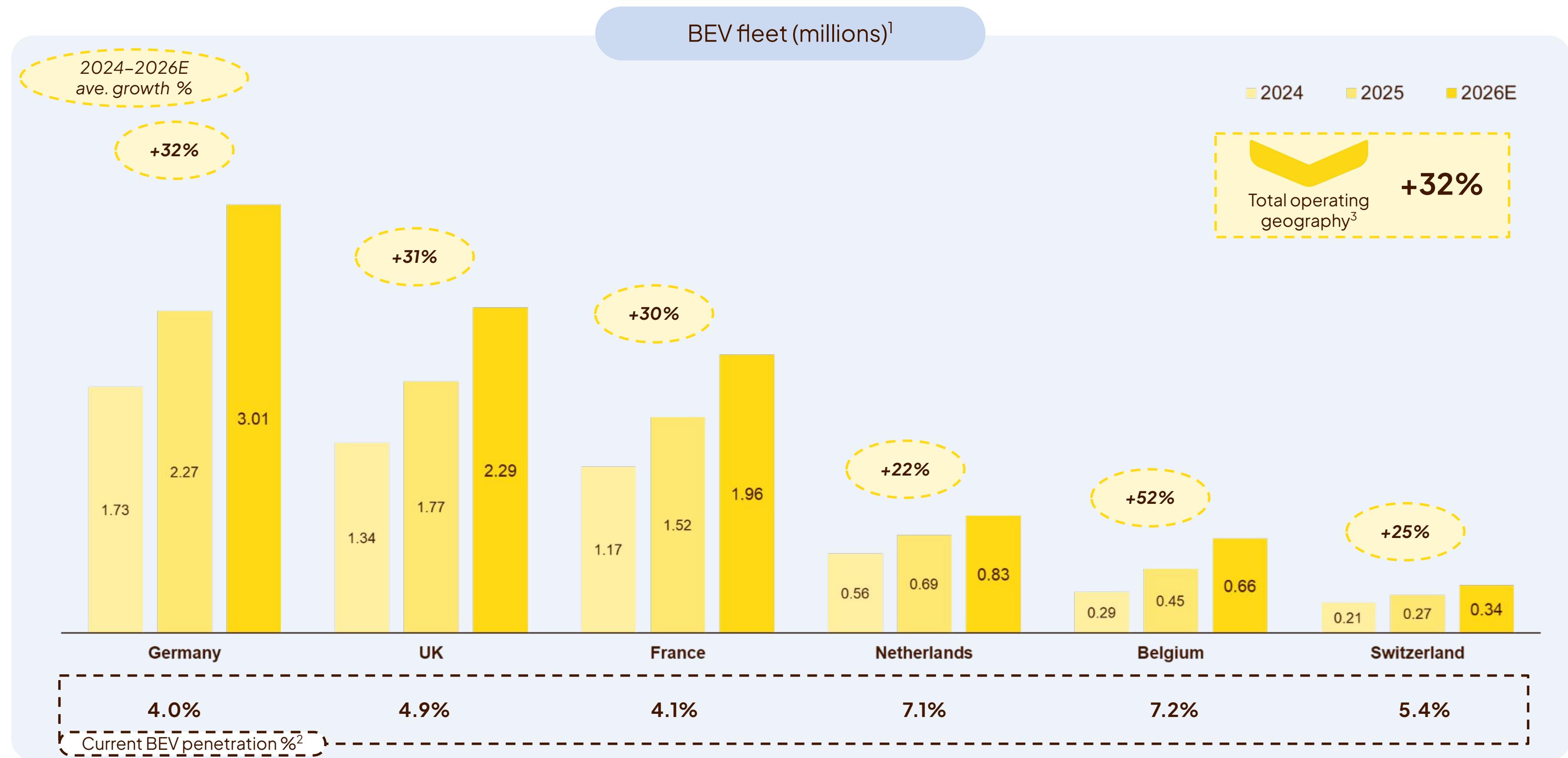
Over 40 per cent of all new cars sold in the Netherlands in 2025 electric

Published on 05-01-2026 at 14:22





# Leading to considerable increases in BEV fleet across our key markets





## Key Q4 Business highlights



50 station milestone in BE & DE



‘Aire de saint Yvi’ France tender win



Retail bond programme raised €110m in 2025

“Fastned raises €39m in third bond issue of the year to surpass €110m in funding in 2025”

Fastned Press Release, 3rd November 2025

New 1000kW charger installed in the field





# Station sales continue to grow

€k	Average station <b>Q4 2024</b>	Average station <b>Q4 2025</b>
Average daily traffic	~30k	~30k
BEV fleet penetration	~5.0% <sup>1</sup>	~6.0% <sup>1</sup>
Average # of chargers	6.1	6.4
Sessions per day	53	57
<b>Average MWh (Annualised)</b>	<b>504 MWh</b>	<b>552 MWh</b>
Annualised revenue / station	315 <sup>2</sup>	385 <sup>2</sup>
Gross margin	244 (€0.48/kWh)	300 (€0.54/kWh)
Operating costs per station	115 <sup>3</sup>	142 <sup>4</sup>
<b>Operational EBITDA (B)</b>	<b>129 (41%)</b>	<b>158 (42%)</b>
Initial investment (A) <sup>5</sup>	754	892
<b>ROIC (= B / A)</b>	<b>17%</b>	<b>18%</b>
Time-based utilisation rate <sup>5</sup>	14.9%	14.6%
ROIC at 30% utilisation, current charge speed	>40%	>40%

## Results

Station sales continued to grow with energy delivered per average station increasing by 10% YoY

Organic sales growth (excl. new stations that are in ramp up) was 18%, comparing to BEV fleet penetration growth of 20%

Building more stations in less mature markets (per the previous slide) has a dampening effect on sales per station growth. We estimate this effect at -2% in 2025 and -4% in 2026

Gross margin per station increased by 21%, due to a price increase and lower energy costs

Note: Q4 figures are unaudited and may be subject to change 1) Average across Fastned countries, weighted by the number of stations in each country, 2) Annualised revenue related to charging for the period, 3) based on €18.9k per charger for 2024, 4) based on €22.2k per charger for H125 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. Q4 2024 and Q4 2025 figures are as at 30 June 2024 and 2025 respectively.



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



**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

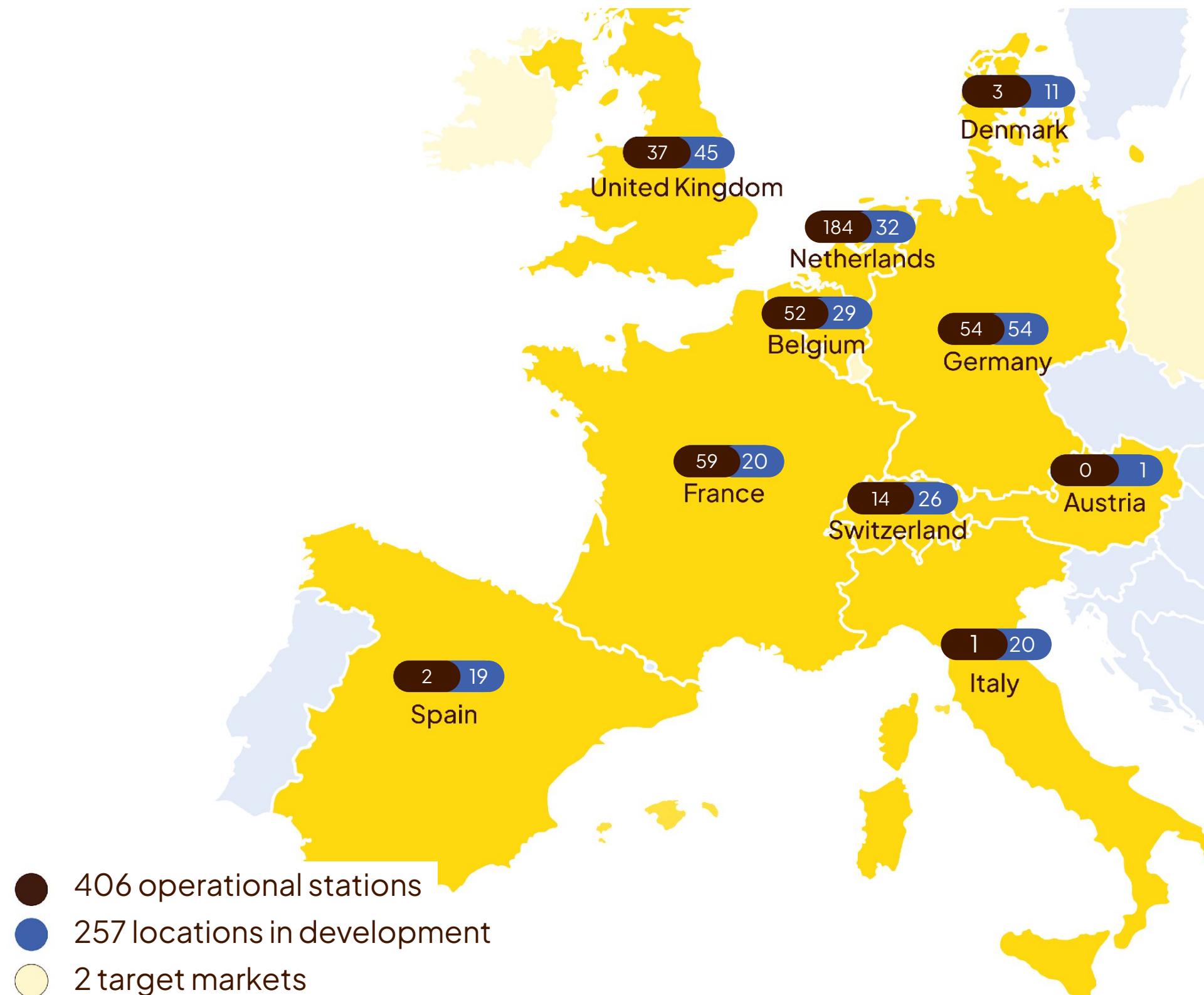
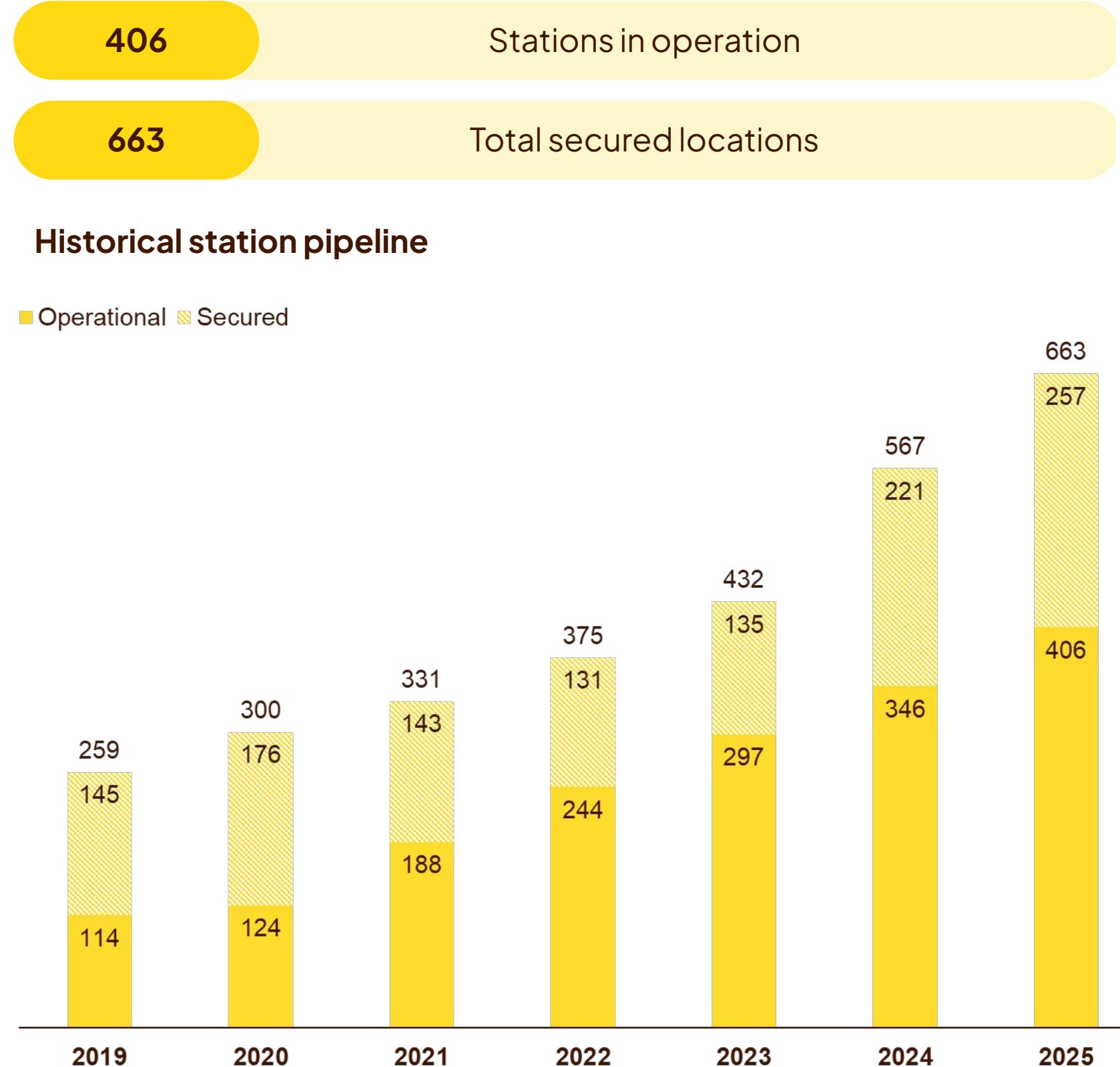


A yellow chevron logo is positioned above the text. The background is a photograph of several wind turbines silhouetted against a sunset sky, with mountains in the distance.

## Appendix B **Network & Pipeline**



# 400+ operational stations across 9 geographies





# Pioneering the way with 2,421 chargers across our scalable network

	300-400kW	150-200kW	50kW	Total
	904	206	26	1,136
	241	24	-	265
	308	4	4	316
	401	-	-	401
	174	13	20	207
	48	-	-	48
	24	-	-	24
	8	-	-	8
	16	-	-	16
Total	88%	10%	2%	100%





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## Appendix D Financial

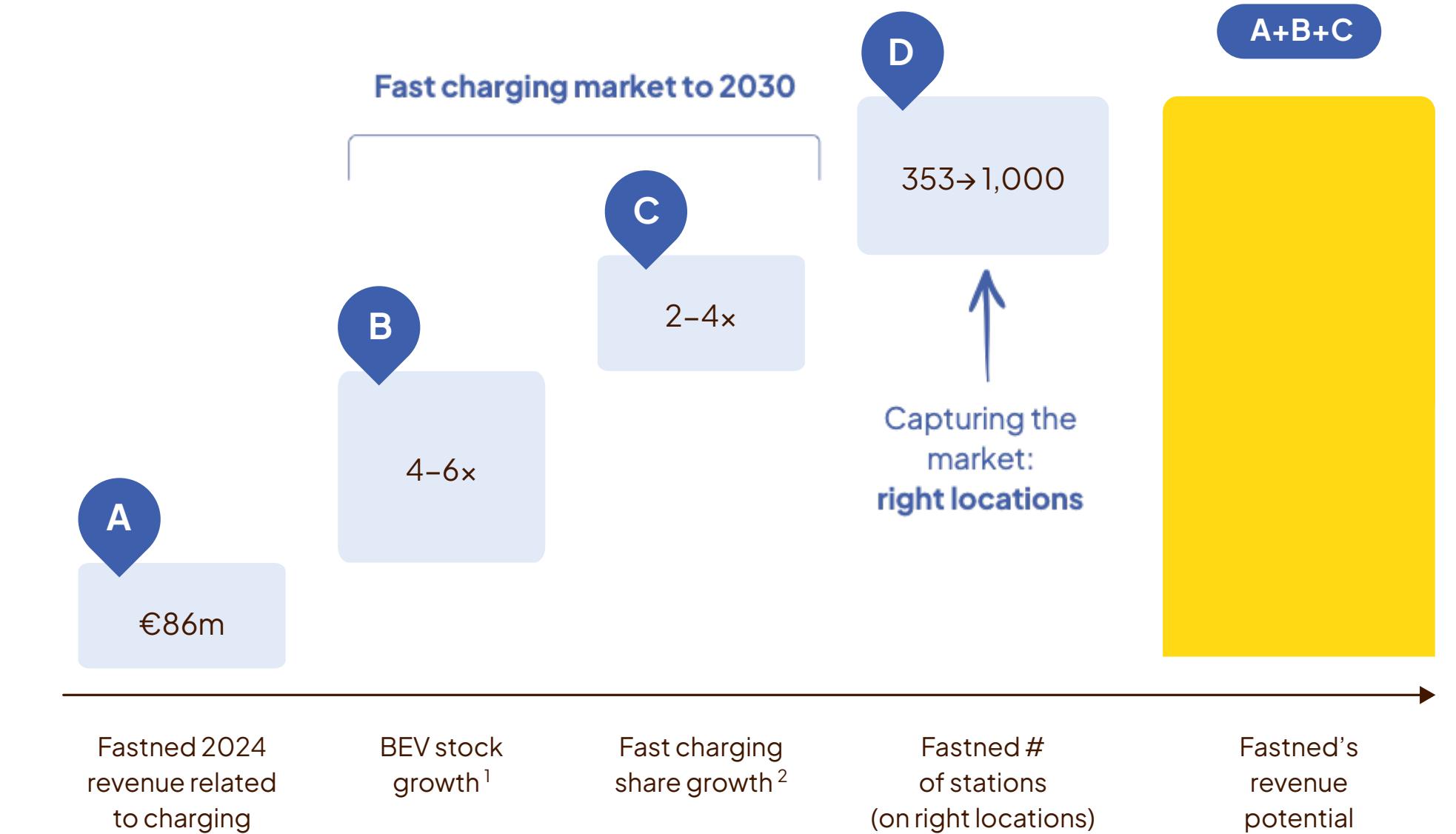


# Fastned revenue potential



BEV stock growth x Fast charging growth  
x Right location growth

- ✓ Fast charging demand accelerating- 4-6x more BEVs- 2-4x more fast charging
- ✓ High traffic locations are paramount to capture this market
- ✓ Fastned # locations to grow 3x
- ✓ Revenue potential growing accordingly



Sources: 1-Derived from Schmidt Automotive research forecasts | 2-Derived from fast charge share projections by TNO, McKinsey, Boston Consulting Group and ChargeUp Europe



# H1 2025 financials: strong revenue growth, expanding country teams

		First half (unaudited)		
€ million	YoY %	2025	2024	2023
<b>1 Revenues related to charging</b>	44%	<b>54.3</b>	<b>37.8</b>	<b>26.1</b>
Gross profit related to charging	38%	<b>41.0</b>	<b>29.8</b>	<b>19.6</b>
Gross profit per kWh (€)		0.50	0.47	0.47
Network operation costs	54%	(23.2)	(15.0)	(9.0)
Network operation costs per charger (€k)		10.4	8.3	6.6
<b>2 Operational EBITDA</b>	21%	<b>17.9</b>	<b>14.7</b>	<b>10.6</b>
Operational EBITDA margin		33.0%	39.0%	40.6%
Network expansion costs	50%	<b>(16.3)</b>	<b>(10.9)</b>	<b>(7.8)</b>
<b>3 Underlying company EBITDA</b>		<b>1.4</b>	<b>3.2</b>	<b>2.8</b>
Exceptional items		1.6	0.1	(3.3)
<b>EBITDA</b>		<b>3.0</b>	<b>3.3</b>	<b>(0.5)</b>
D&A and provisions		(13.0)	(9.8)	(6.9)
Finance income / (cost)		(8.2)	(4.9)	(2.2)
<b>4 Underlying net profit</b>		<b>(19.9)</b>	<b>(11.6)</b>	<b>(6.3)</b>
<b>Net profit</b>		<b>(18.3)</b>	<b>(11.4)</b>	<b>(10.3)</b>

## 1 Strong organic and inorganic revenue growth

Fastned has two big revenue growth drivers:

- **Organic volume growth, at +18.5% YoY** in H1 2025, at the 296 stations operational at 1 January 2024.
- **Inorganic volume growth through new station openings, at +11.5% YoY** in H1 2025, with 67 stations opened since 1 January 2024.

## 2 Expansion of Operational EBITDA

Due to gross margin expansion, despite Network operating cost growth

Main drivers of Network operation cost growth are expanding operations teams in the various markets and increased grid fees

## 3 Positive Underlying EBITDA

Significant expansion of Network expansion costs, mainly location design and construction management in various markets, to increase construction pace to > 100 stations annually in next few years

Marketing campaign also have an impact on EBITDA

## 4 High expansion effort explains negative net profit

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

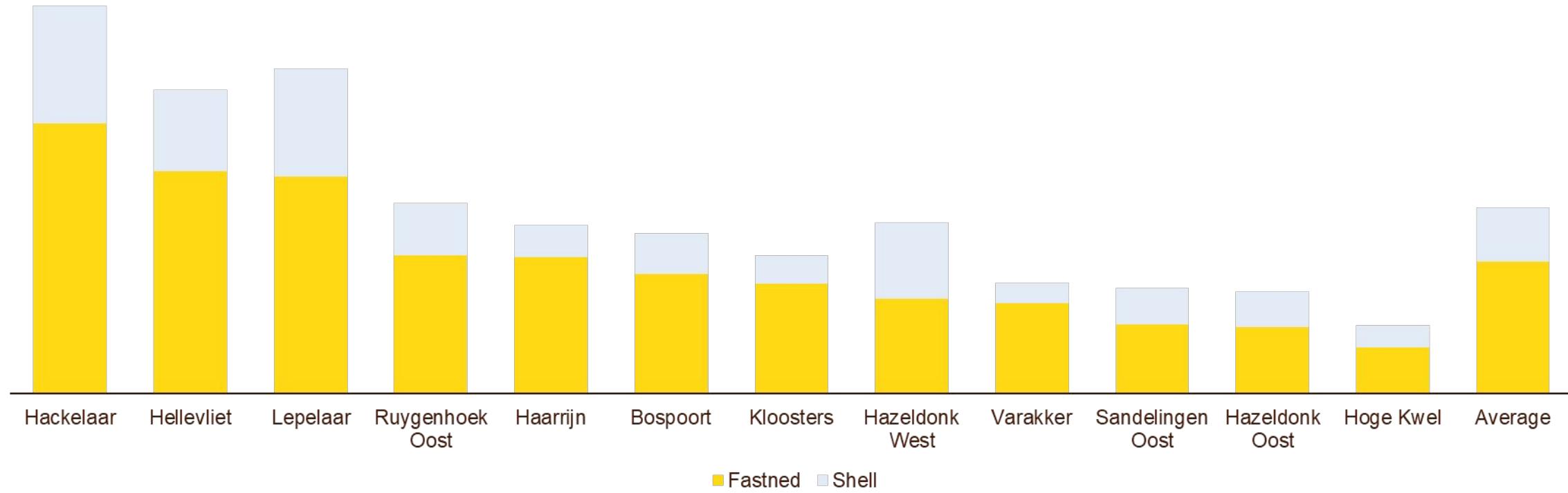


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# Appendix E Competition



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



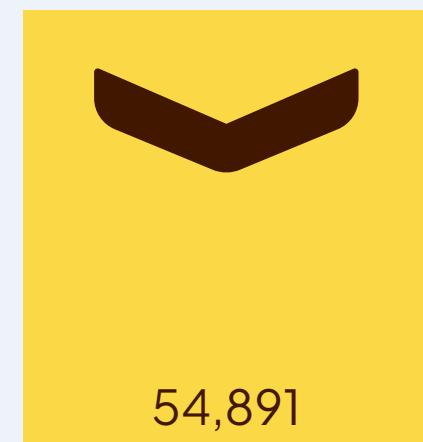
**Case Study:** 3x charging volumes at co-located Hackelaar stations with equal number of charging points

Total number of sessions in 2023



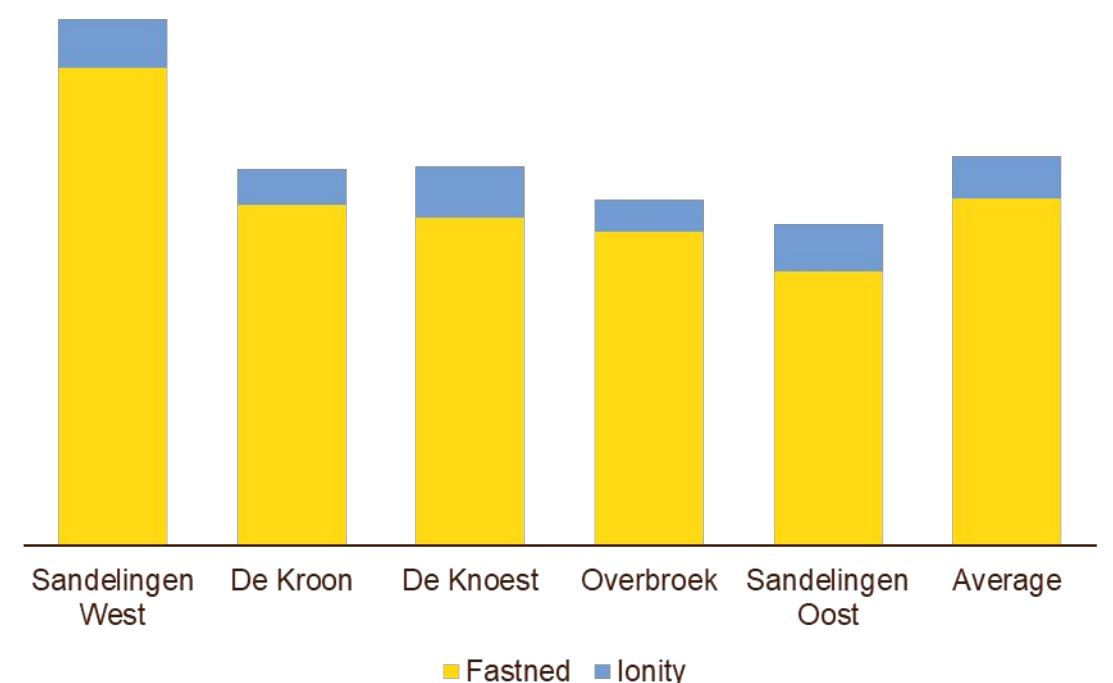
17,466<sup>2</sup>

Shell



54,891

Fastned





# Charging at motor service areas has a 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

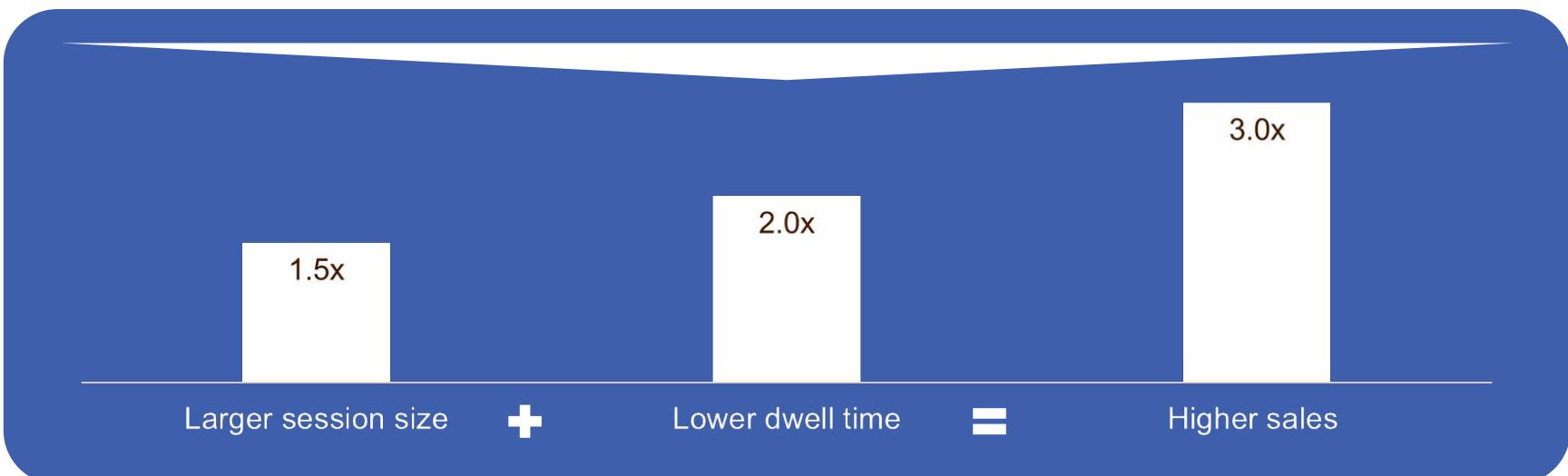
Because people will charge at MSAs when their battery is low, rather than their fridge being empty, State of Charge (SoC) is expected to be lower, increasing maximum potential session sizes

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>	69 kWh <sup>1</sup>
<b>Maximum session size</b>	<b>52 kWh</b>	<b>35 kWh</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>





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## Appendix F BEV Market

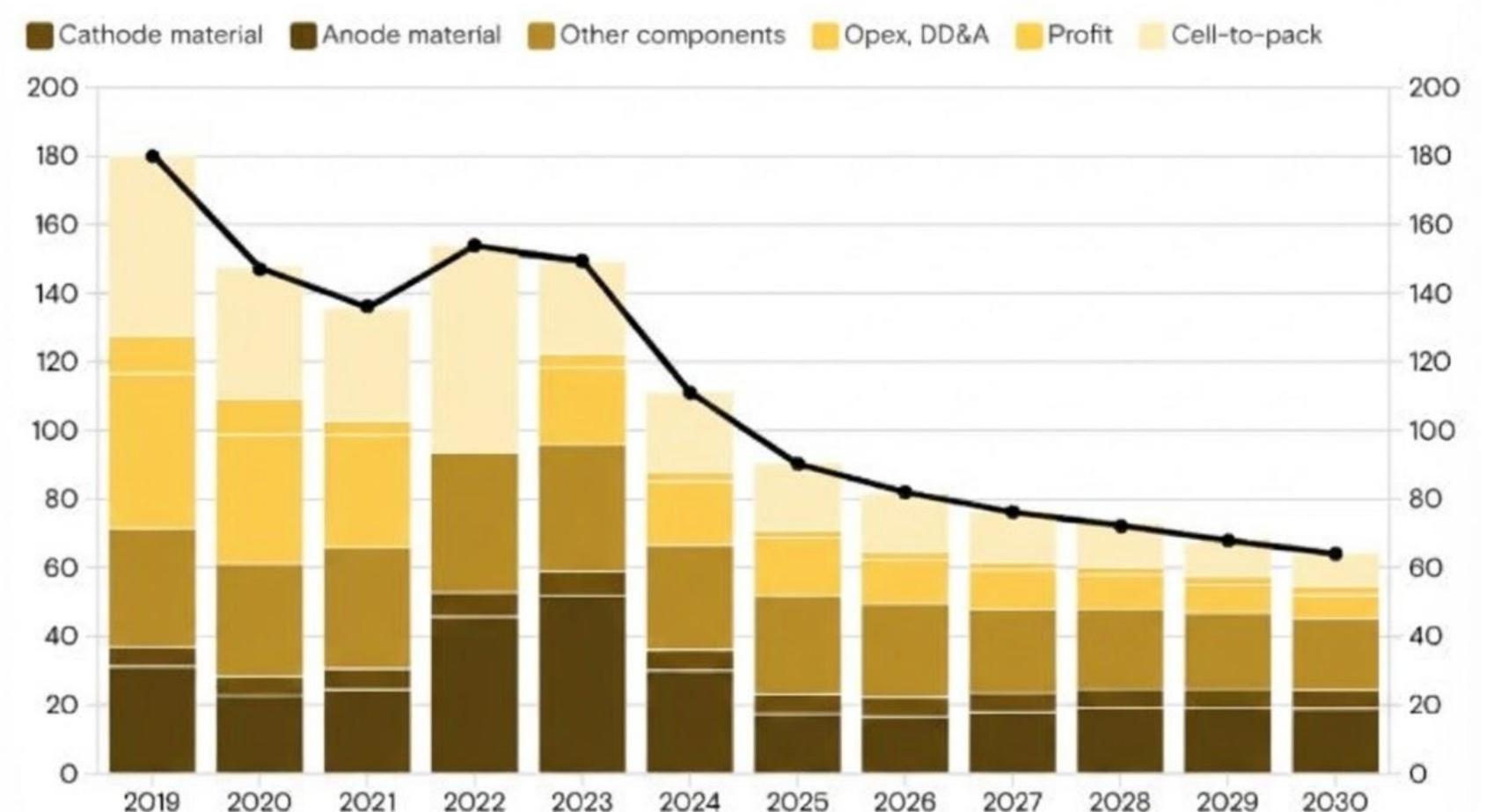


# Long term BEV growth drivers in place

- 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 2030<sup>1</sup>...**

Average battery pack prices \$/kWh



<sup>1</sup>) [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
	€45,500	€33,300 <span style="color: orange;">-27%</span>	€28,700 <span style="color: orange;">-14%</span>
Price	125 km	325 km <span style="color: orange;">x2.6</span>	415 km <span style="color: orange;">+28%</span>
Real-world range	40 kW	145 kW <span style="color: orange;">x3.6</span>	350 kW <span style="color: orange;">x2.4</span>
Charging power			
ICE	VW Golf 1.4 TSI	VW Golf 1.5 eTSI	Mid-sized ICE
	€31,400	€33,000 <span style="color: orange;">+5%</span>	€33,000 <span style="color: orange;">+0%</span>
Starting Price			



# 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 Korolov

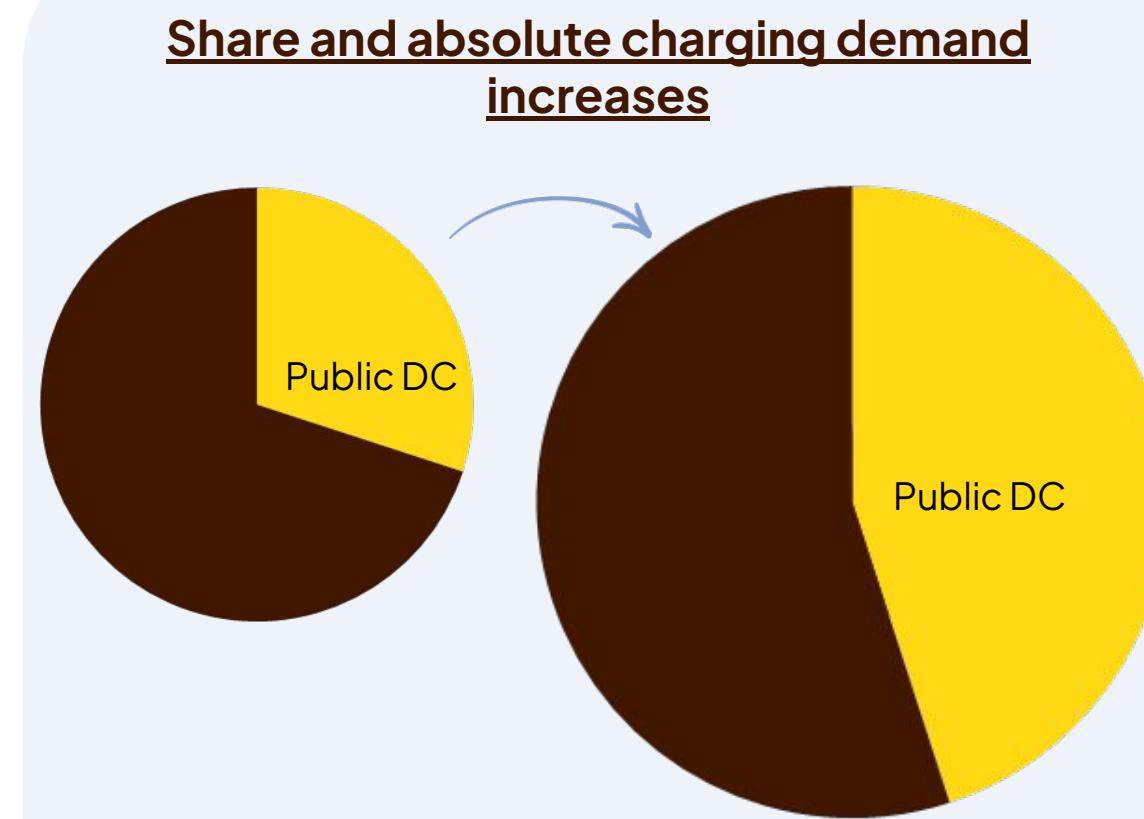
## BYD Showcases EV with 'Megawatt' Five Minute Charging Time



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.

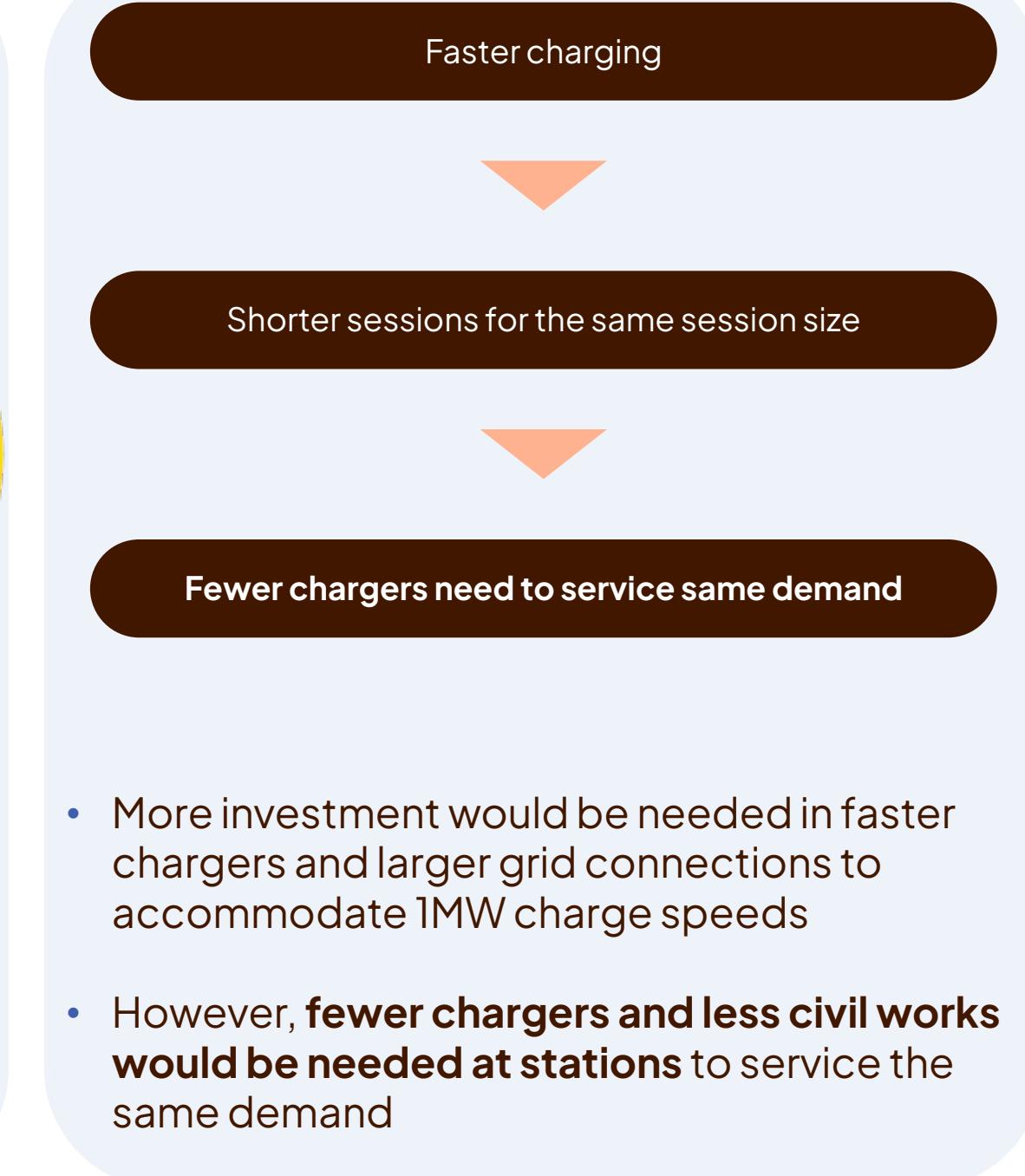
- Technology continues to improve with BYD releasing **400km of range in five minutes charging**
- This technology is expected to **form part of the BEV mass market adoption**

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



- 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





A yellow chevron logo is positioned above the title text. The background of the slide is a photograph of several wind turbines silhouetted against a sunset sky, with mountains visible in the distance.

## Appendix G Sustainability



## Improving ESG performance through fulfillment of roadmap milestones

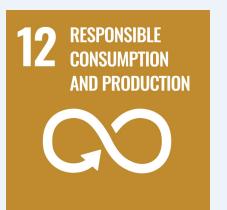
- ✓ Completed and verified first double materiality assessment in late 2024, as shared in the 2024 annual report
- ✓ Completed first limited assurance engagement on 5 ESG KPIs in 2024, as shared in 2024 annual report
- ✓ Scope 1, 2 and 3 emissions were a KPI verified through limited assurance engagement (mentioned above)
- ✓ UN SDGs adopted in 2022



## GREENHOUSE GAS PROTOCOL



## SUSTAINABLE DEVELOPMENT GOALS





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

## Compliance and reporting

- Fastned will continue to report at high level despite being out of scope for CSRD (Omnibus Package)
- Participated in first limited assurance engagement on 5 ESG KPIs for 2024 annual report
- Completed CSRD-compliant double materiality assessment in 2024
- EU Taxonomy eligibility

## Understanding our footprint

- Calculated CO2 footprint data for all Fastned stations based on LCA of a standard NL station
- Received limited assurance on scope 1, 2 and 3 emissions calculations for first time in 2024
- Recertified for Level 4 of CO2 Performance Ladder in late 2024; Will recertify again in 2025
- 2030 CO2 emissions / kWh reduction targets of:
  - 65% for scope 1,
  - 60% for scopes 2 and business travel,
  - 60% for scope 3 (rest of),
  - 60% for Capital Goods category<sup>1</sup>

## Making a positive impact

- Piloted low-carbon construction projects in 2022 and 2024; Investigating more opportunities
- Validated our 2023 Guarantees of Origin to give more transparency to customers; 2024 is nearly complete
- Engage in community outreach initiatives ~3–4 times a year across entire organisation
- Became B Corp certified in Q3 2024

Notes: 1) 2022 as base year



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## Appendix H

## Future Industries

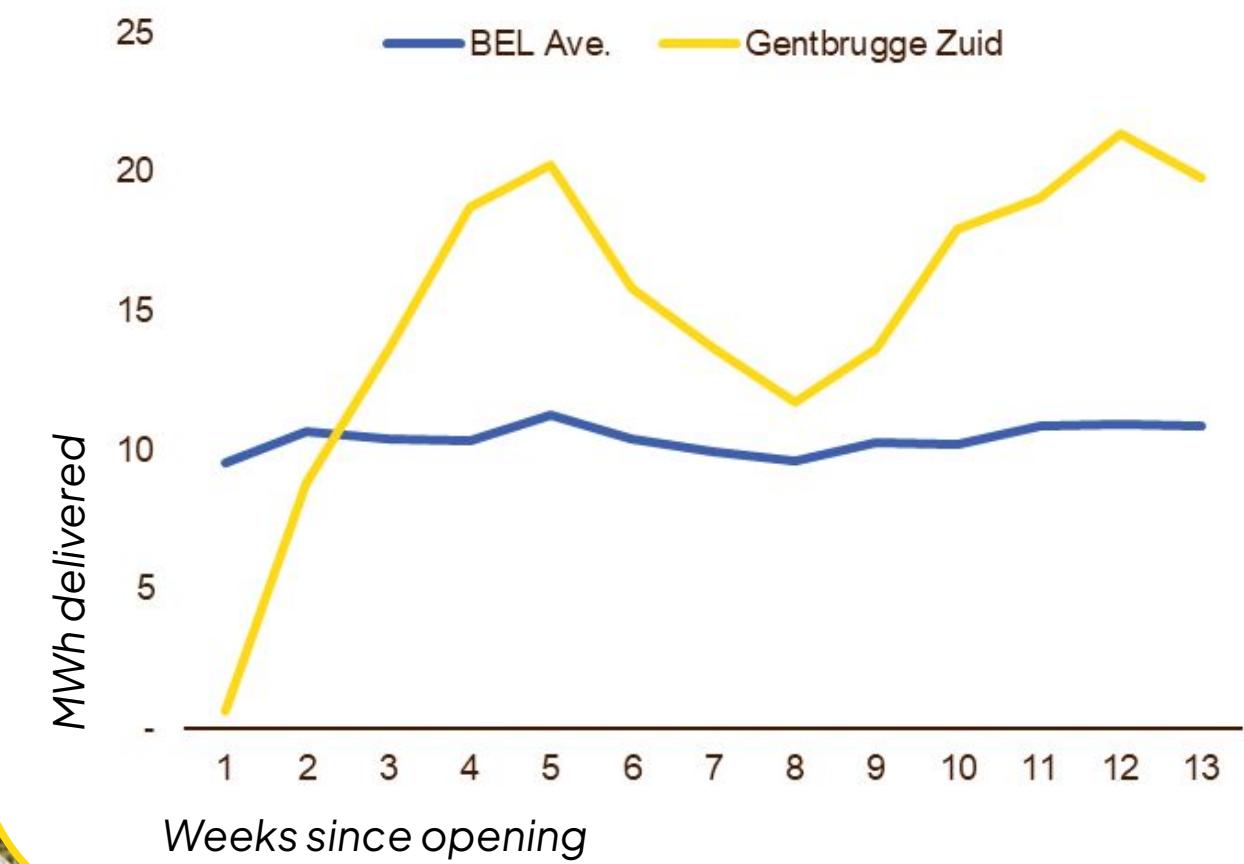


# Gentbrugge Zuid

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



More and more trucks are coming to the roads



Image source: Hans Hermans, Fastned founder



# Fastned

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