



Fastned Investor Presentation

November 2024

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

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Investment Highlights

Fastned is the leading European public DC charge point operator (CPO) with an expansion strategy focused on top-tier, high traffic locations

European leader in public DC fast charging at high traffic locations

- 1,000 stations in 2030
- Unparalleled track record at the public tender line
- Proven & expanding private location strategy

Best positioned to both capture and enable the tailwind of BEV adoption

- BEV adoption to 5x by 2030
- >30% market share for public fast charging
- Larger, faster batteries enabling more sales

Best-in-class and most recognisable charging concept, managed in house

- A charging network EV drivers know is reliable
- Highest customer satisfaction scores
- Outperform competitors 4x at shared locations

Market-leading station economics and business model

- Capex efficiency from in house construction
- Operational EBITDA margin >40%
- Pricing flexibility from superior business case

Mission driven management with ESG at the core of everything we do

- Thought leader in charging & BEV transition
- Displacing CO2 emissions by enabling EV adoption
- Actively manage scope 1, 2 & 3 emissions



Our mission

Accelerate the transition to electric mobility by giving freedom to electric drivers

Our goal

A European network of 1,000 large stations

Our climate impact

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



100% local sun, wind & hydro energy¹

Certified



Corporation

2023



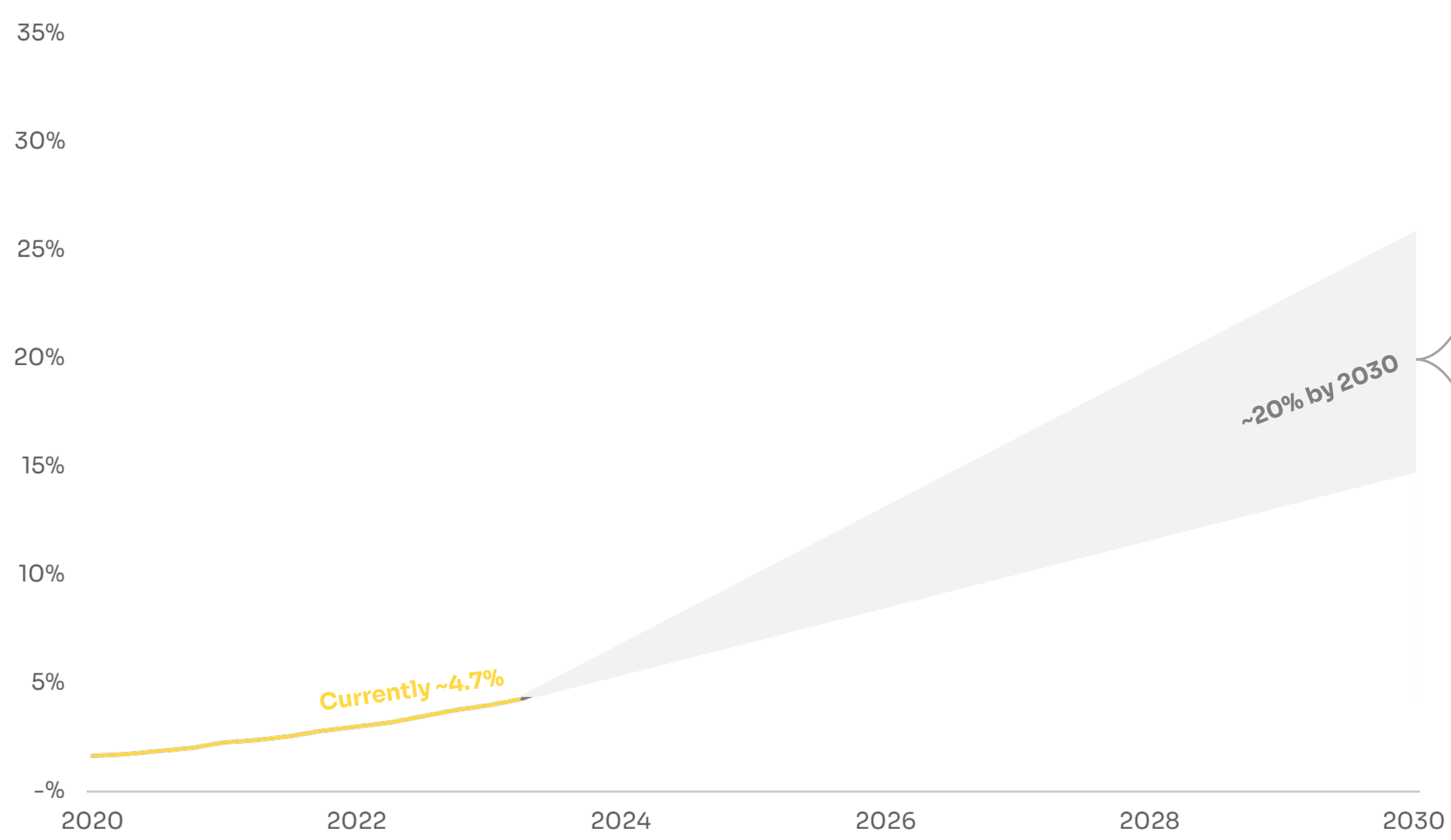
CO₂ avoided

96,148 tonnes

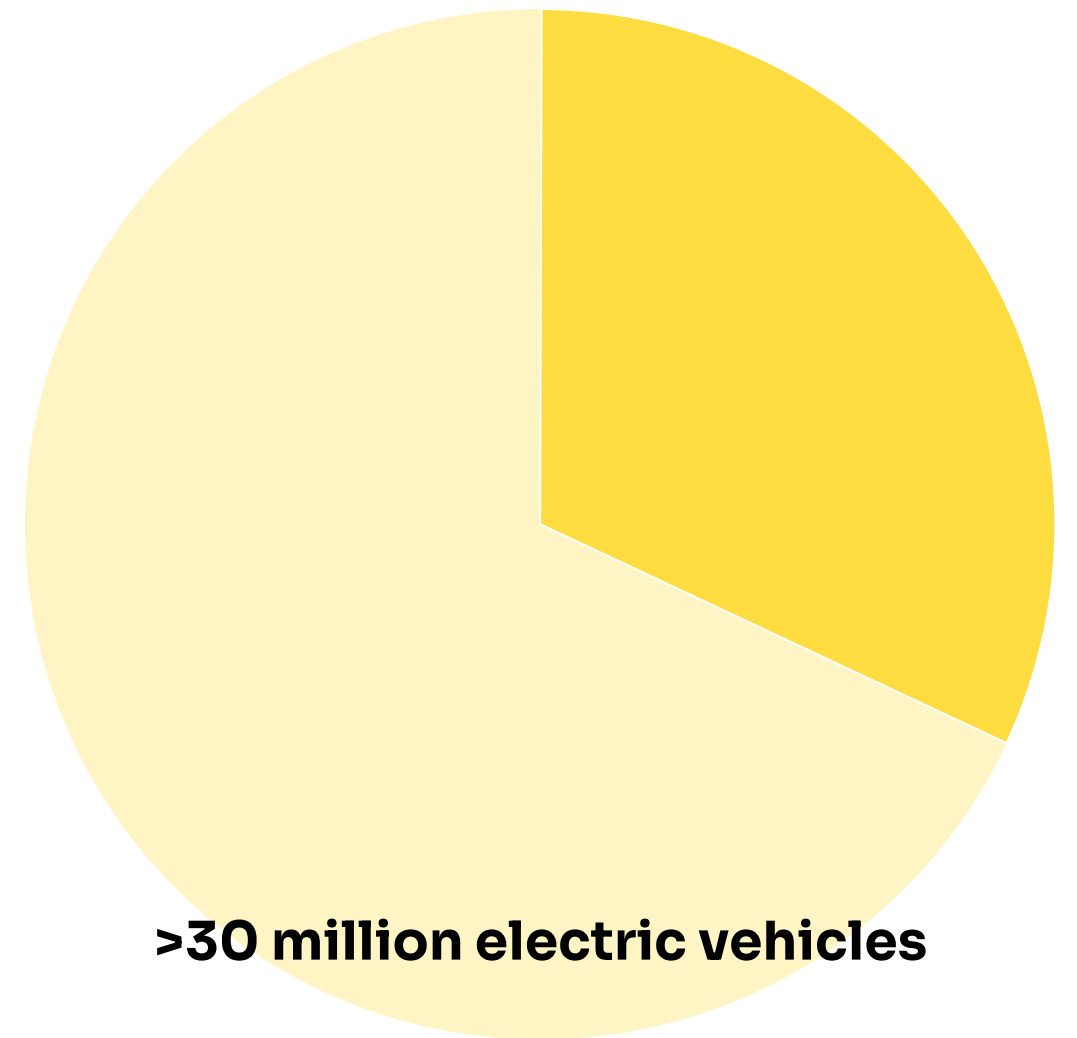
¹) For every kWh sold through the grid we buy local (same or adjacent country) solar&wind guarantees of origin

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

BEV penetration in Fastned's operating geographies¹



2030 BEV charging market



- >30 million electric vehicles**
- > 75 billion kWh / year** recurring charging demand
- > 30% public fast charging³**
- > € 10bn high growth fast charging market⁴**

Notes: 1) Station-weighted across Fastned's operating footprint, as at March 2024. 2) Source: Schmidt Automotive Research November 2023. Only covers Fastned operating geography. 3) BNEF Electric Vehicle Outlook 2023. 4) Fastned analysis

Long term BEV growth drivers in place

1 **Government incentives - due to CO2 reduction targets**

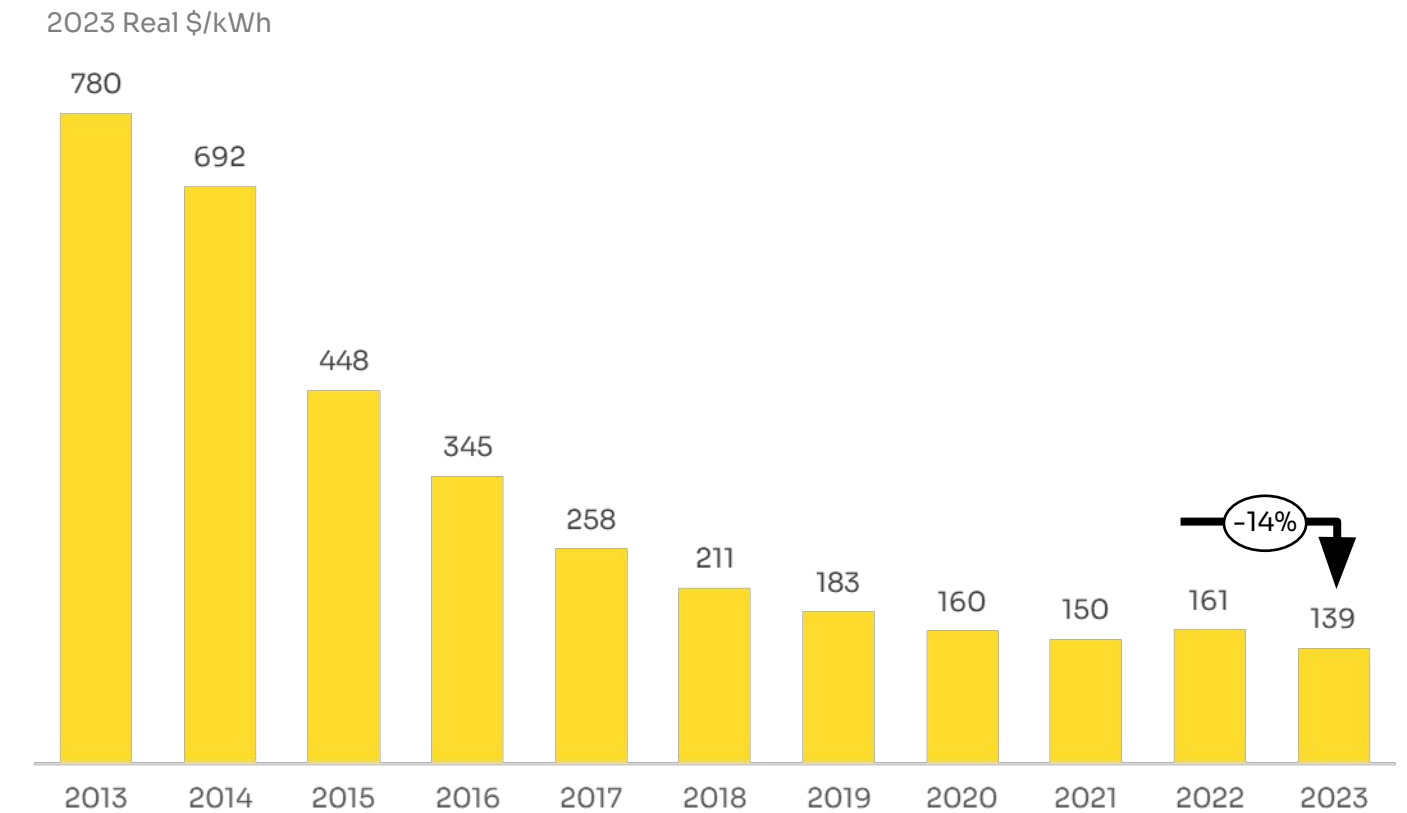
2 **Increasing supply of BEVs**

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 2022¹...



... with continued price reduction expected in 2024



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

Source: BNEF

Who is leading the charge?

Top 10 players in the Western European public fast charging market¹



Type	Overall sales	Sales / location	Main location strategy
OEM	High	High	Off highway - navigation pull
Pure play	High	High	Highway / high traffic roads
Utility	High	Low	Parking lots
OEM	High	High	Highway / high traffic roads
Oil major	Medium	Low	Adding chargers - on/off high traffic roads
Pure play	Medium	Low	Off highway
Pure play	Low	Medium	Highway / high traffic roads
Utility	Low	Low	Parking lots
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Fastned ranks among the top 3 fast charging companies in Western Europe

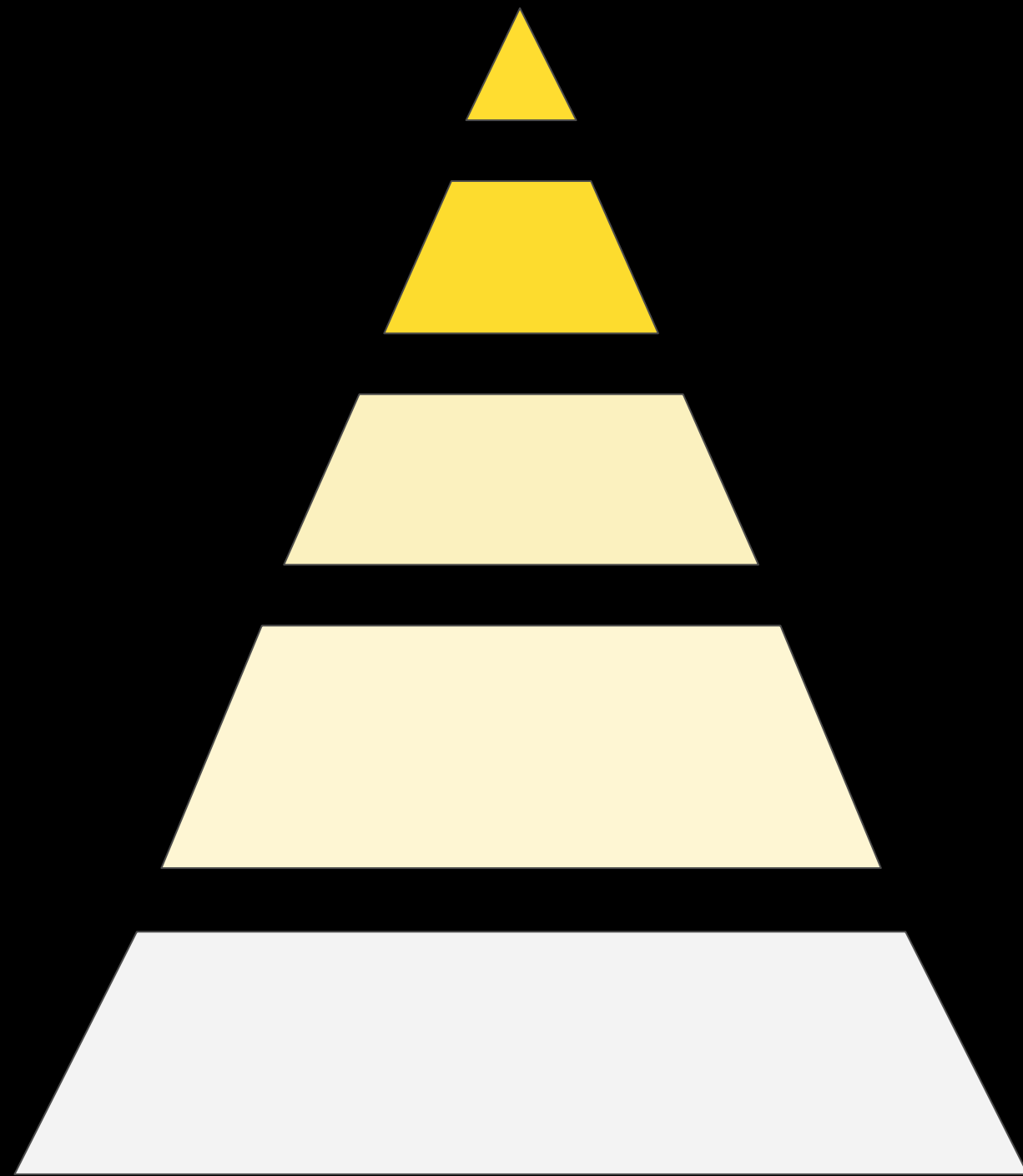
- Leveraging high sales per location - due to high traffic location strategy & great concept
- Despite having 4x less locations than some market participants

High sales per location lead to:

- High customer satisfaction & utility
- Efficiencies (cost & utilisation)
- Great business case

¹) UK, Netherlands, Belgium, Germany, France, Switzerland Sources: public data, Fastned analysis. Tesla data are estimates. Full year 2023 data.

Location availability



On highway

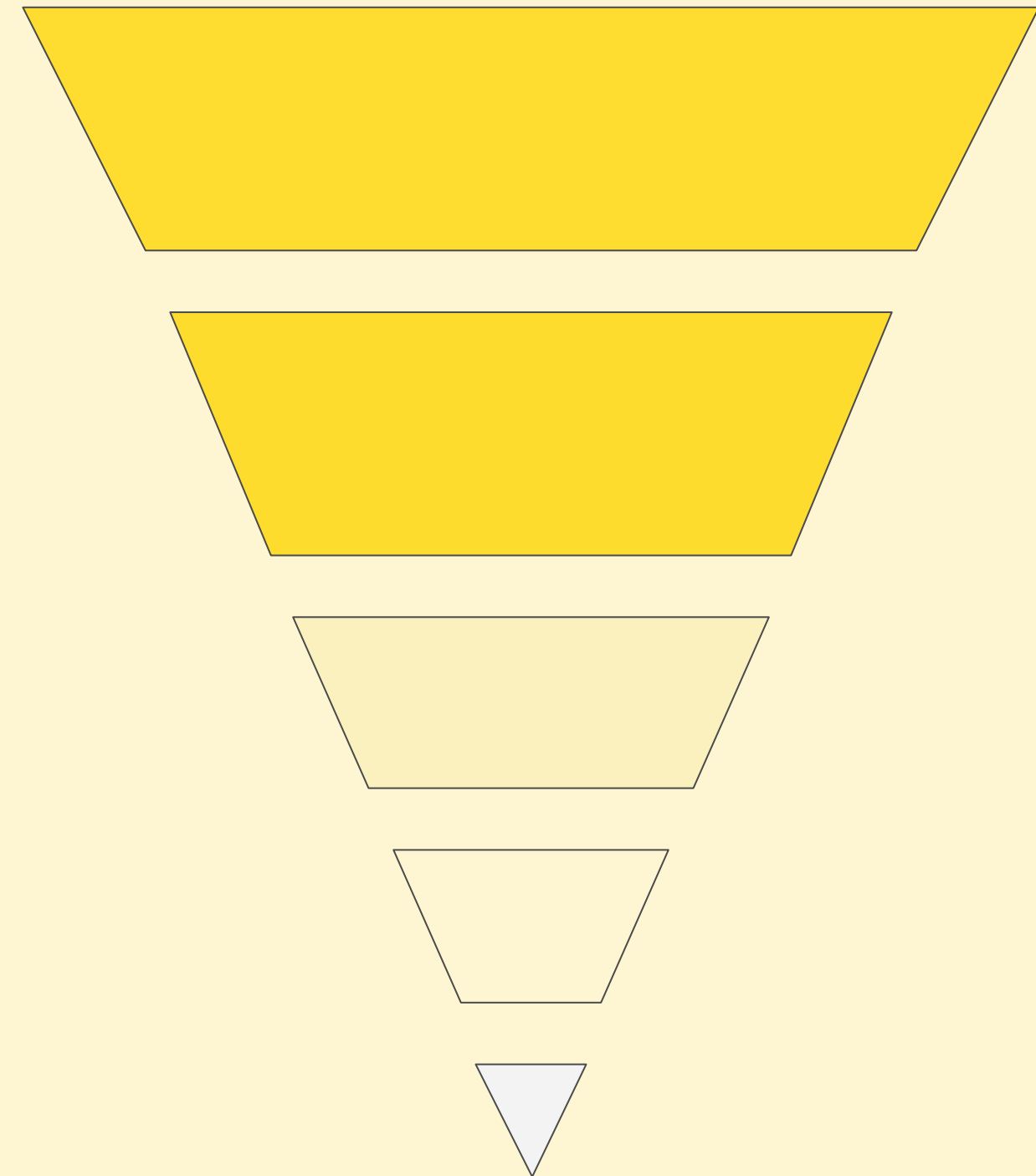
Highway exits

National roads

Urban roads

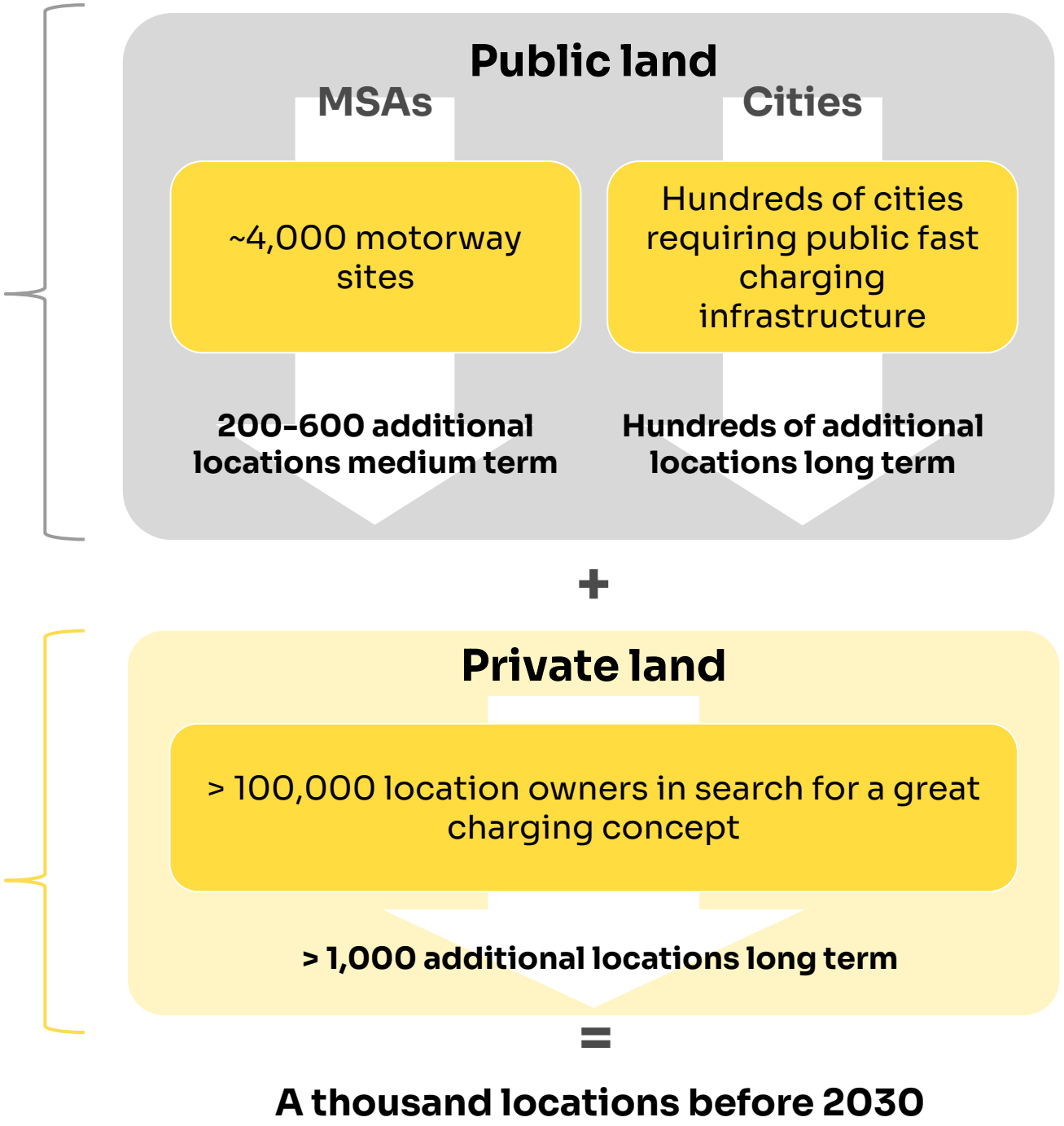
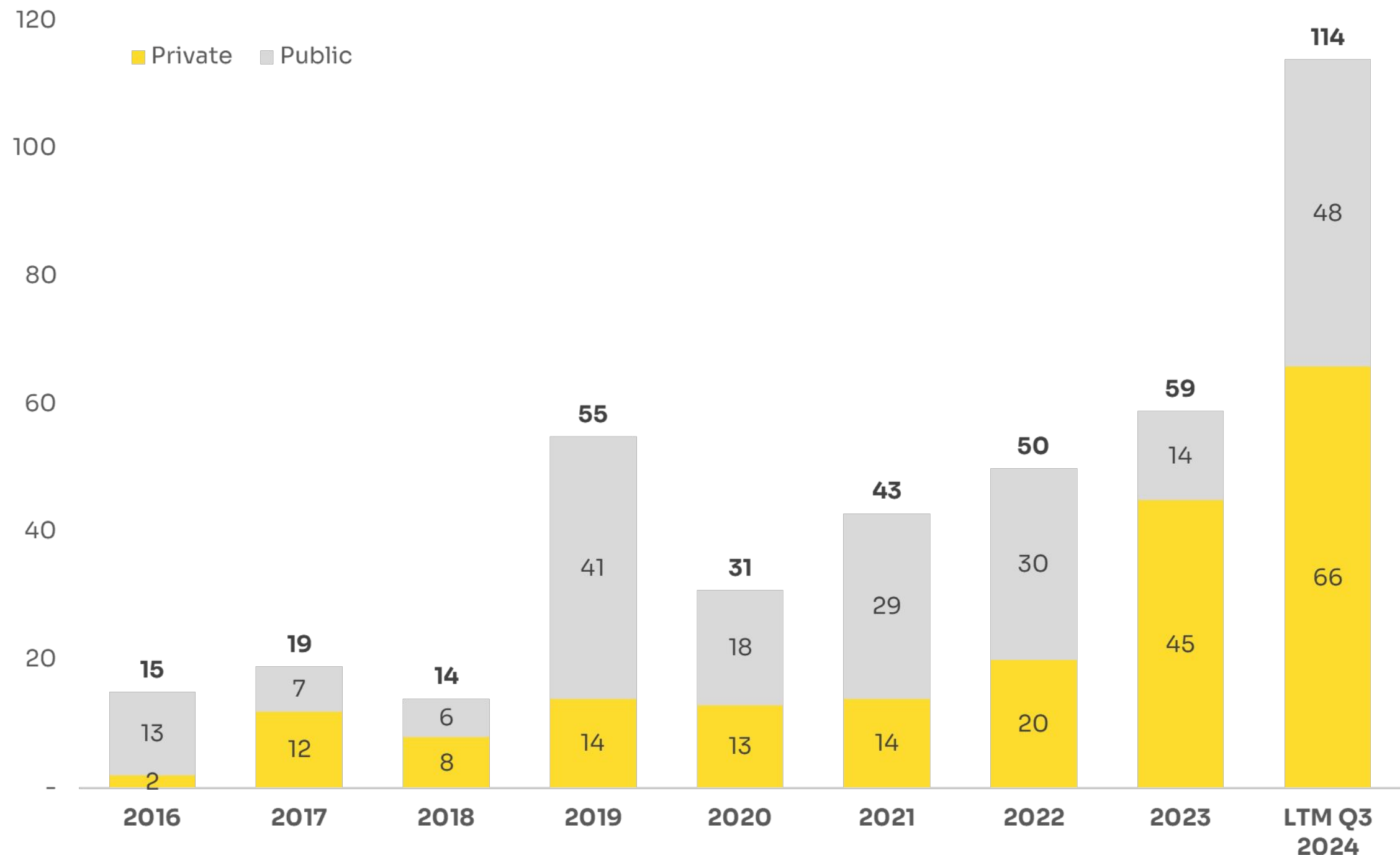
Other & destination

Portfolio ambition



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

Sites secured on private and public land¹



1) LTM = last twelve months

Places for London – building London’s charging network



EV Charging Hubs Tender

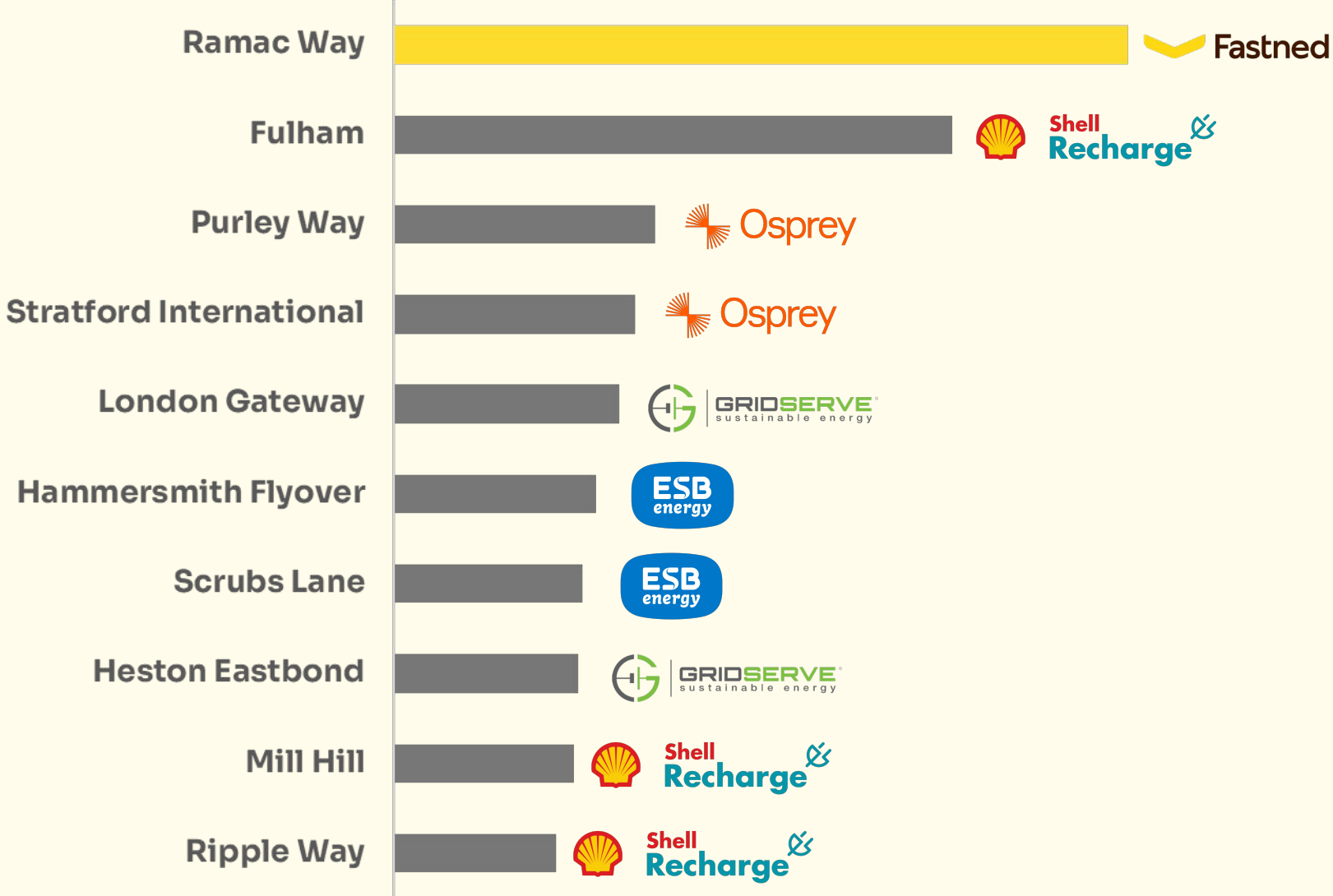
- Charging hubs will help the Mayor of London achieve Net Zero carbon by 2030
- 51: 49 long term joint venture between Fastned and Places for London
- Five initial seed sites, additional 20 sites identified and potential to expand to 65 sites
- Stations are located on key arterial roads and will be of significant scale

Stations
Hanger Lane
Canning Town
Hatton Cross
Tottenham Hale
Hillingdon Circus

Ramac Way Case Study

- Located off the Woolwich road in Borough of Greenwich
- Ramac way is the most successful fast-charging station in London despite only having six charging positions

London – 2023 sessions per station



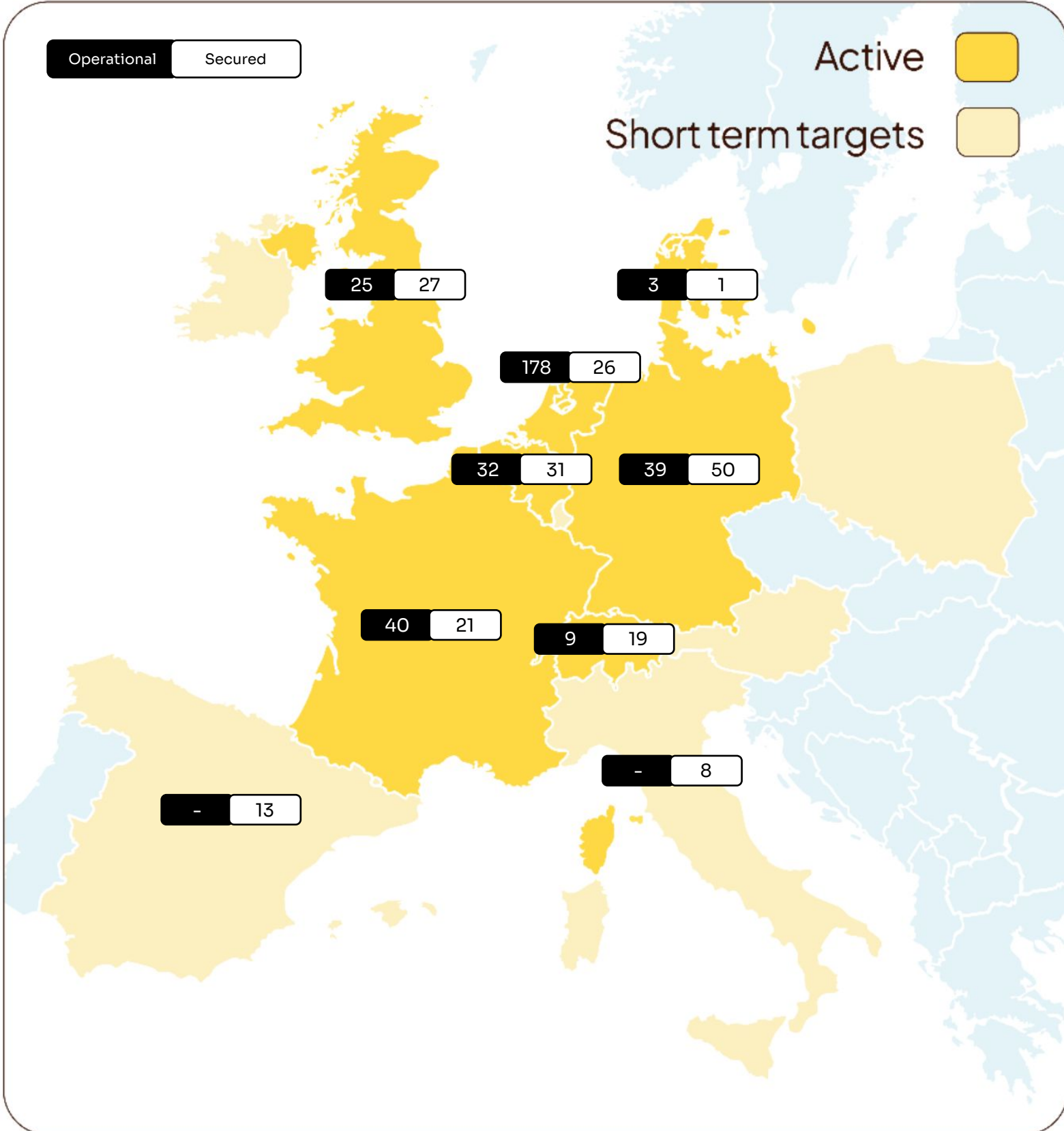
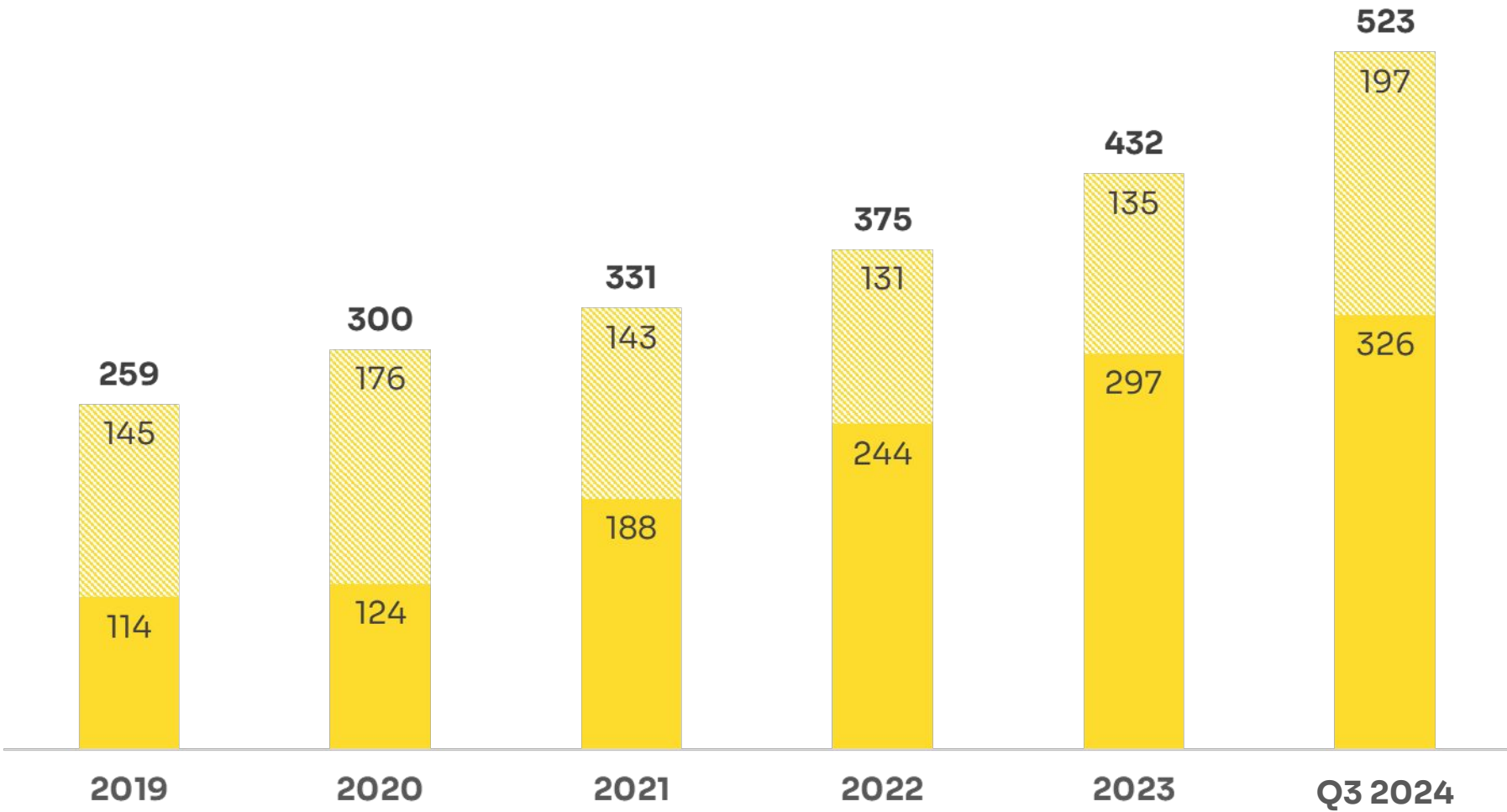
Halfway to 1,000 stations: 500+ sites secured

326 Stations in operation

523 Total secured locations

Historical station pipeline

Operational
Secured



We have built the best charging concept in the market

1 High traffic location strategy



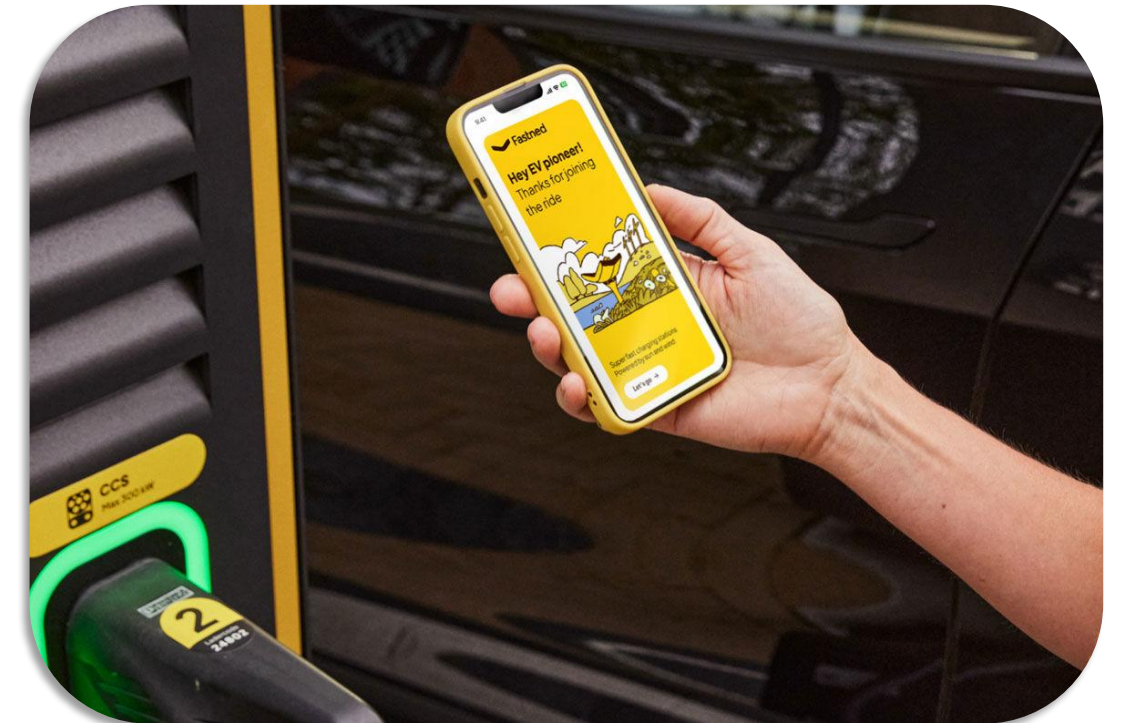
High traffic business case supports the necessary investment to realise best charging concept



2 Vertically integrated business model



3 Best customer experience



99.9%
station uptime

Google
4.4/5
net promoter score

zapmap
#1
charging network

Chargemap
#1
charging network

Fastned remains the top choice for EV drivers

Google Reviews
4.4 / 5

Highest Google reviews in the market
vs. competition between 3.3 and 4.1

Customer Net Promoter Score of **60**, considered **excellent**

AUTOBLOG.NL Which fast charging network is your favourite?

42% **Fastned**

31% **TESLA**

15% **IONITY**

8% **Shell Recharge**

1% **McDonald's**

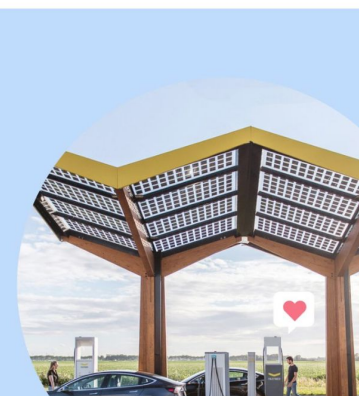
1% **TotalEnergies**

2% **Other**

Chargemap Rank #1 most reliable EU charging network, 2023

The best-rated networks in terms of infrastructure reliability in Europe

1. Fastned
2. Tesla Superchargers
3. Electra
4. Carrefour
5. Allego
6. Chargy
7. IONITY
8. e-Vadea
9. Iarecharge
10. SDEM50



“Infrastructure reliability is an important criterion for electric car drivers. This includes ease of use, the start of charging, the ratio of power delivered to power expected, the condition of the charging point and cables, etc. **Fastned came first in the ranking**”

Chargemap – 2023 EU charging network blog²

Best EV charging networks 2023
Rapid / En-route **zapmap**

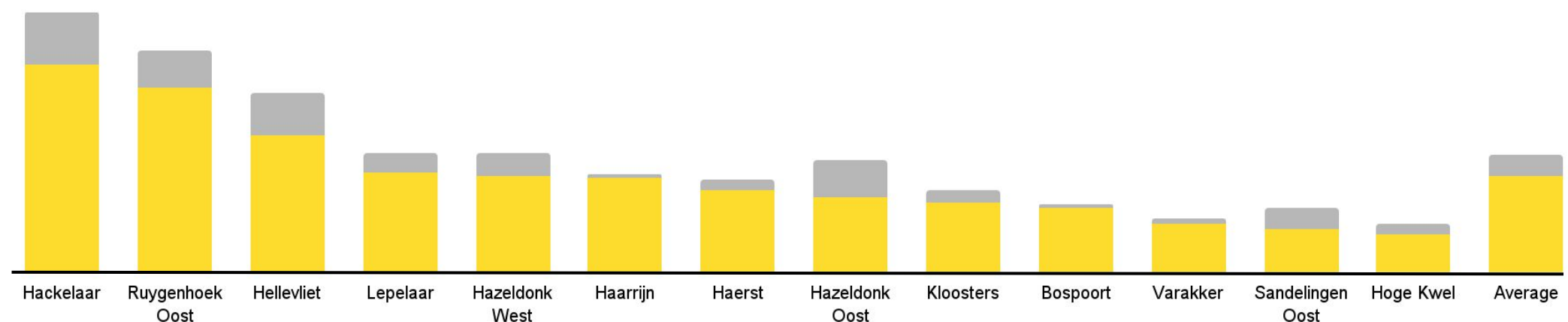
Rank	EV network	Overall rating*	Star rating**	Equivalent Rank 2022***
1	FASTNED	4.3	★★★★★	1
2	mfg EVPOWER	3.9	★★★★★	1
3	Osprey	3.8	★★★★★	4
4	IONITY	3.7	★★★★★	5
5	INSTAVOLT	3.6	★★★★★	3
6	GRIDSERVE ELECTRIC HIGHWAY	3.2	★★★★★	6
7	ChargePlace Scotland	3.1	★★★★★	7
8	SWARCO E.CONNECT	3.0	★★★★★	8
9	Shell Recharge	2.9	★★★★★	9
10	bp pulse	2.3	★★★★★	11
11	GeniePoint	2.0	★★★★★	10

Highest score in UK driver survey¹
~3600 EV drivers surveyed

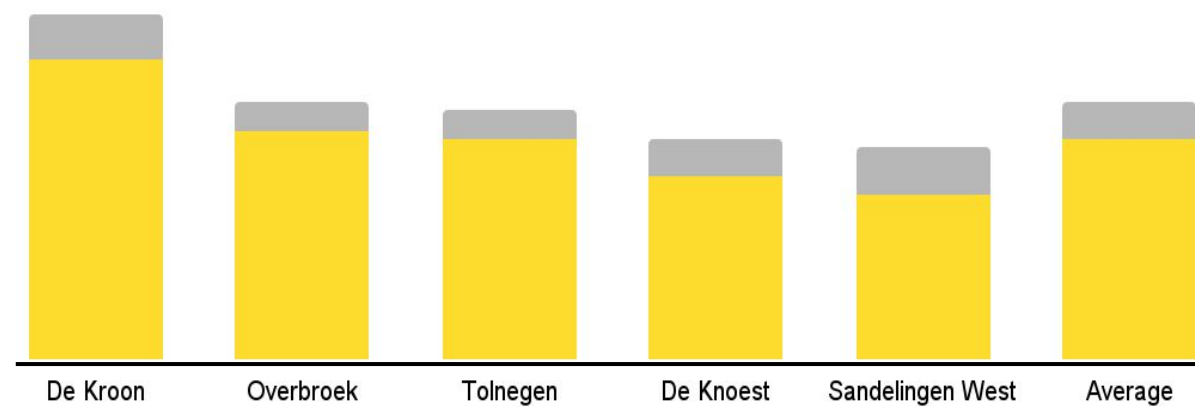
1) Zapmap Best EV Charging Networks 2023
2) ChargeMap 2023 rankings of best charging networks in Europe

Great concept leads to extreme outperformance¹

Number of sessions on co-located sites



■ Competitor 1 ■ Fastned



■ Competitor 2 ■ Fastned

- On co-located locations in the Netherlands, Fastned does more than 80% of the sessions

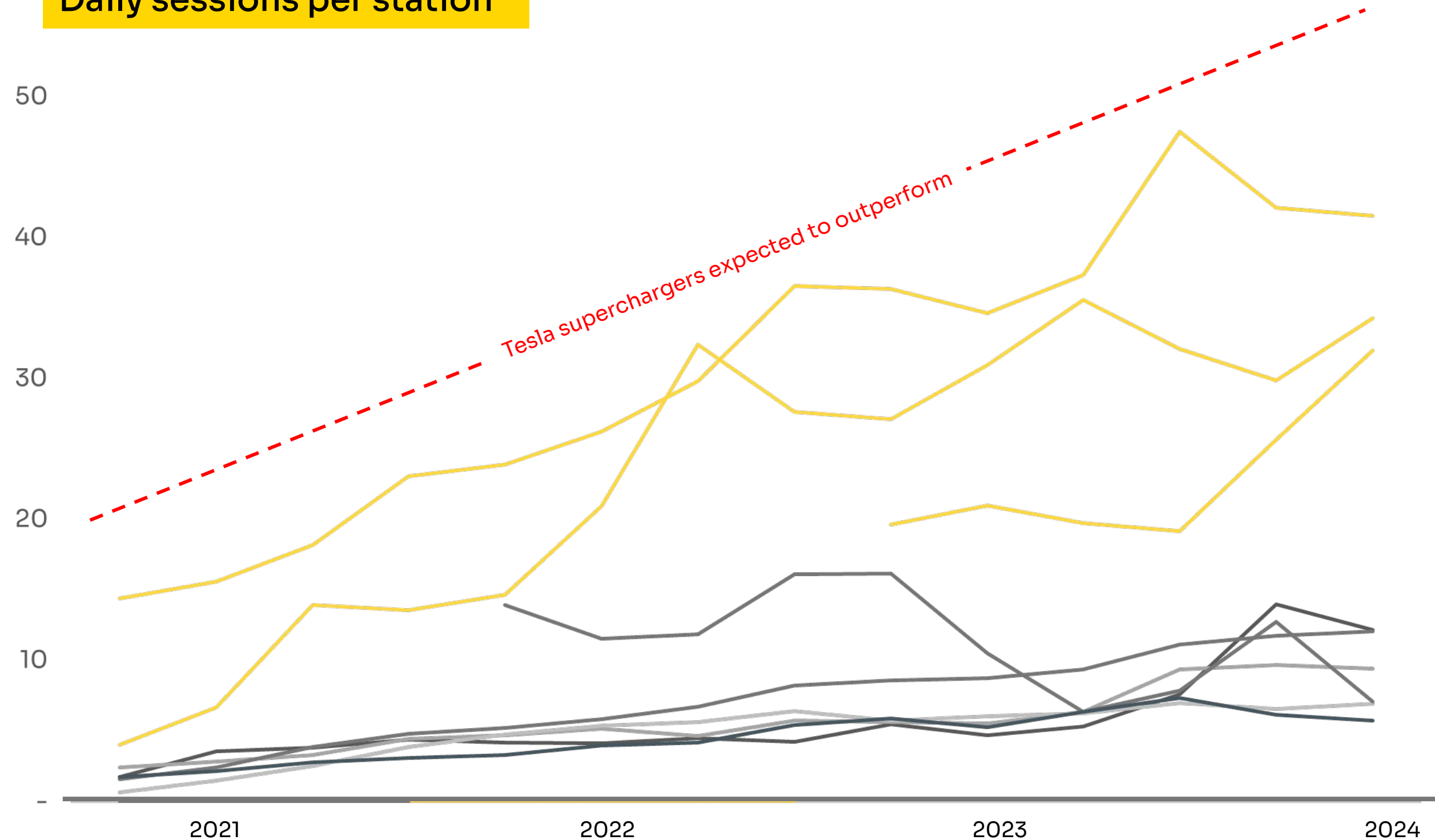


1) Derived from public data, Fastned analysis

Who is leading the charge?

Top 10 players in the Western European public fast-charging market

Daily sessions per station¹



High Sales per station



FASTNED



TESLA



IONITY



GRIDSERVE
SUSTAINABLE ENERGY

Low Sales per station



bp pulse



Allego



EWE GO



Osprey



Shell Recharge



LIDL

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

The business case improves with BEV adoption

€k	Average station Q4 2019	Average station Q3 2024	Average station 2030
Average daily traffic	~30k	~30k	~30k
1 BEV penetration	~0.9% ¹	~4.7% ¹	~20% ¹
2 Sessions per day	14	45	
Average MWh delivered (Annualised)	105 MWh	437 MWh	>2,000 MWh
Annualised revenue / station	61 ²	271 ²	>€1,000k ²
3 Gross margin	51 (€0.49/kWh)	224 (€0.51/kWh)	
Operating costs per station	31	99 ⁴	
Operational EBITDA (B)	20 (33%)	125 (46%)	>400k (40%)
4 Initial investment (A)	307	710	
ROIC (= B / A)	7%	18%	
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

Strong funding and cash position

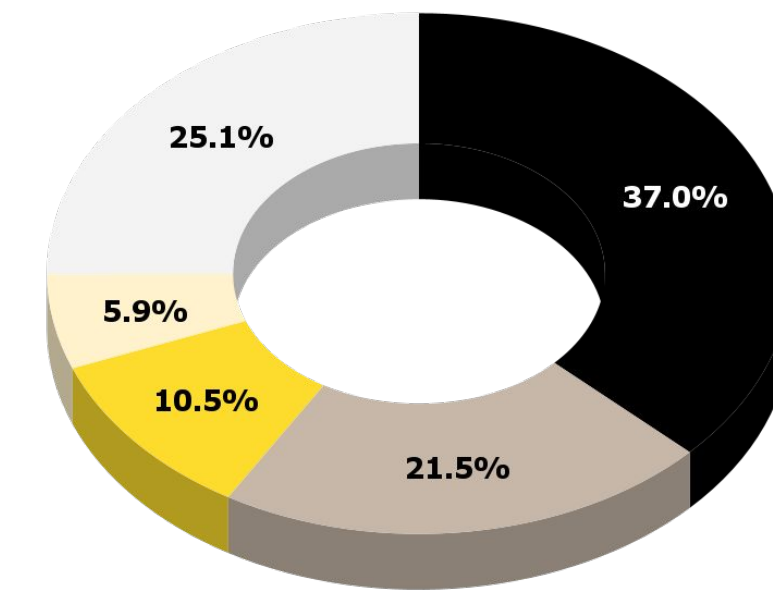
Funding to date:

- > € 240 million in equity funding, through a combination of private placements, an accelerated bookbuild and founders investments
- ~€ 210 million in financial covenant-free retail bond funding

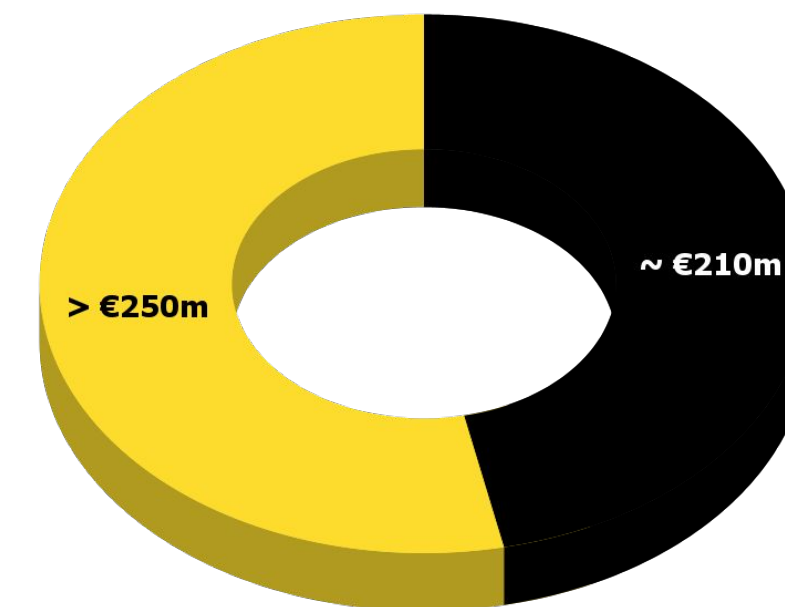
In Q4 2022, Schroders' infrastructure fund invested €75m in equity, became a board member, and long-term partner in our target of 1,000 stations before 2030

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 and shareholding structure



● Co-founder & Board member ● Co-founder & CEO
● Schroders ● Breesaap ● Free float



● Bonds ● Equity

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

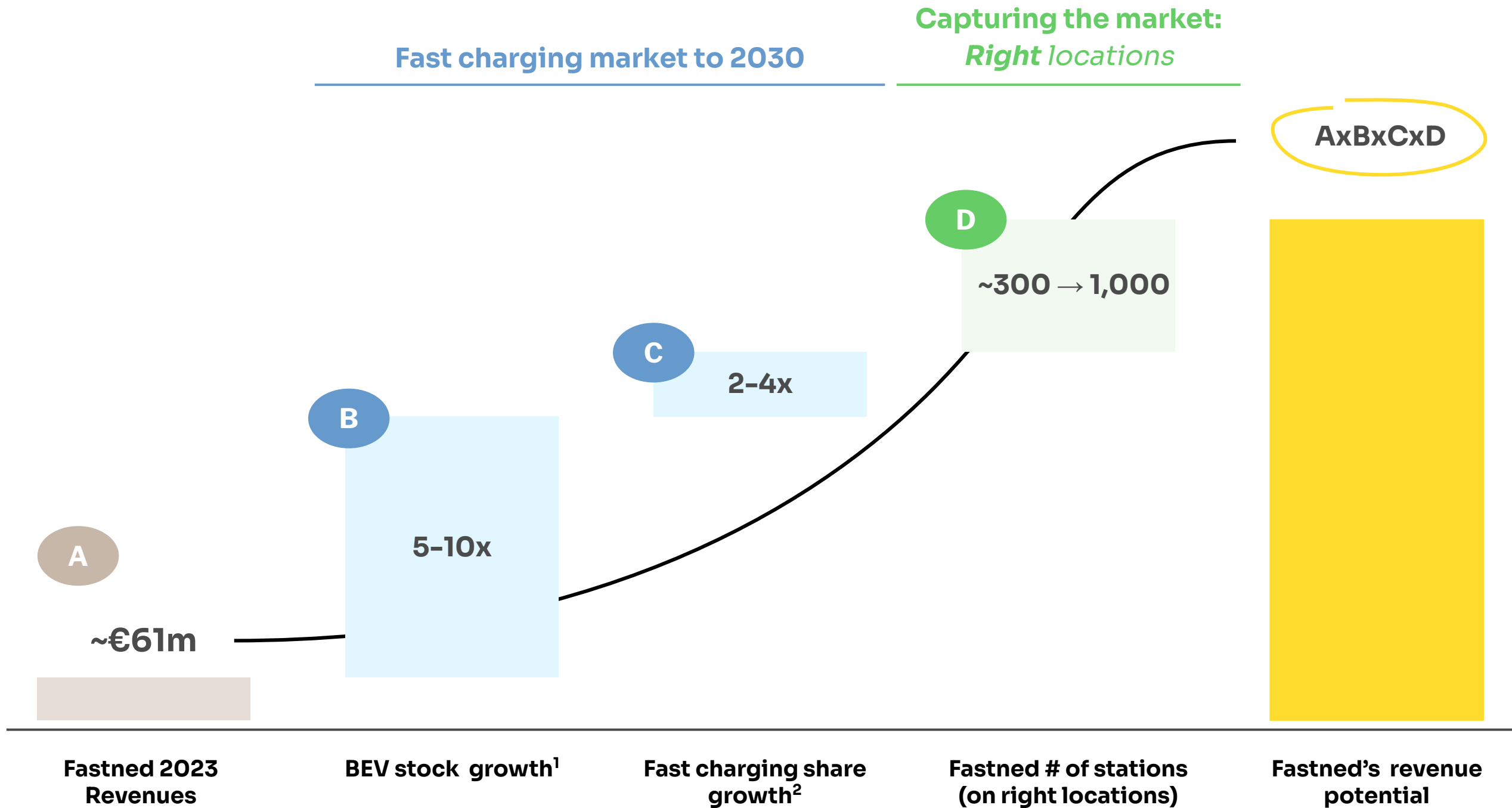
Financial¹

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

1) Based on current forecasts. Underlying company EBITDA excludes exceptional items such as employee options.



Fastned's strategy leads to exponential revenue growth



- ▼ Fast charging demand accelerating
 - 5-10x 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


1) Derived from Schmidt Automotive research forecasts, 2) derived from fast charge share projections by TNO, McKinsey, Boston Consulting Group and ChargeUp Europe

Appendix


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





Michiel Langezaal
CEO & Founder






Robin Wouters
Director Product and Engineering



Victor van Dijk
CFO



Lieke Duijmelings
Commercial Director



Yannick Schuermans
Director Operations & Analytics



Francoise Poggi
COO


Georg Schmidt-Holtmann
Director Construction Management

Maria Garcia
Director Location Design

Caro de Brouwer
Director Network Development



>300 people driving Fastned's mission across 9 countries



Strong organic and inorganic revenue growth

	Delta YoY	First half		
€ million	'23-'24	2024	2023	2022
1 Revenues related to charging	45%	37.8	26.1	12.6
2 Gross profit related to charging	52%	29.8	19.6	7.8
<i>Gross profit per kWh (€)</i>		0.47	0.47	0.38
Network operation costs	67%	(15.0)	(9.0)	(4.8)
<i>Network operation costs per charger (€k)</i>		8.3	6.6	5.7
3 Operational EBITDA	39%	14.7	10.6	3.0
<i>Operational EBITDA margin</i>		39.0%	40.6%	23.8%
4 Network expansion costs	40%	(10.9)	(7.8)	(5.6)
Underlying company EBITDA		3.2	2.8	(2.7)
Exceptional items		0.1	(3.3)	(0.4)
EBITDA		3.3	(0.5)	(3.0)
D&A and provisions		(9.8)	(6.9)	(4.7)
Finance income/(cost)		(4.9)	(2.2)	(3.7)
Underlying net profit		(11.6)	(6.3)	(11.0)
4 Net profit		(11.4)	(10.3)	(11.4)

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 lives

Operating cash flow near neutral and strong funding position

€ million	Delta YoY	First half		
	'23-'24	2024	2023	2022
Revenues related to charging	49%	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)
6 Operating Cash Flow		(1.0)	(2.5)	(8.3)
Capex		21.9	38.0	23.4
5 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

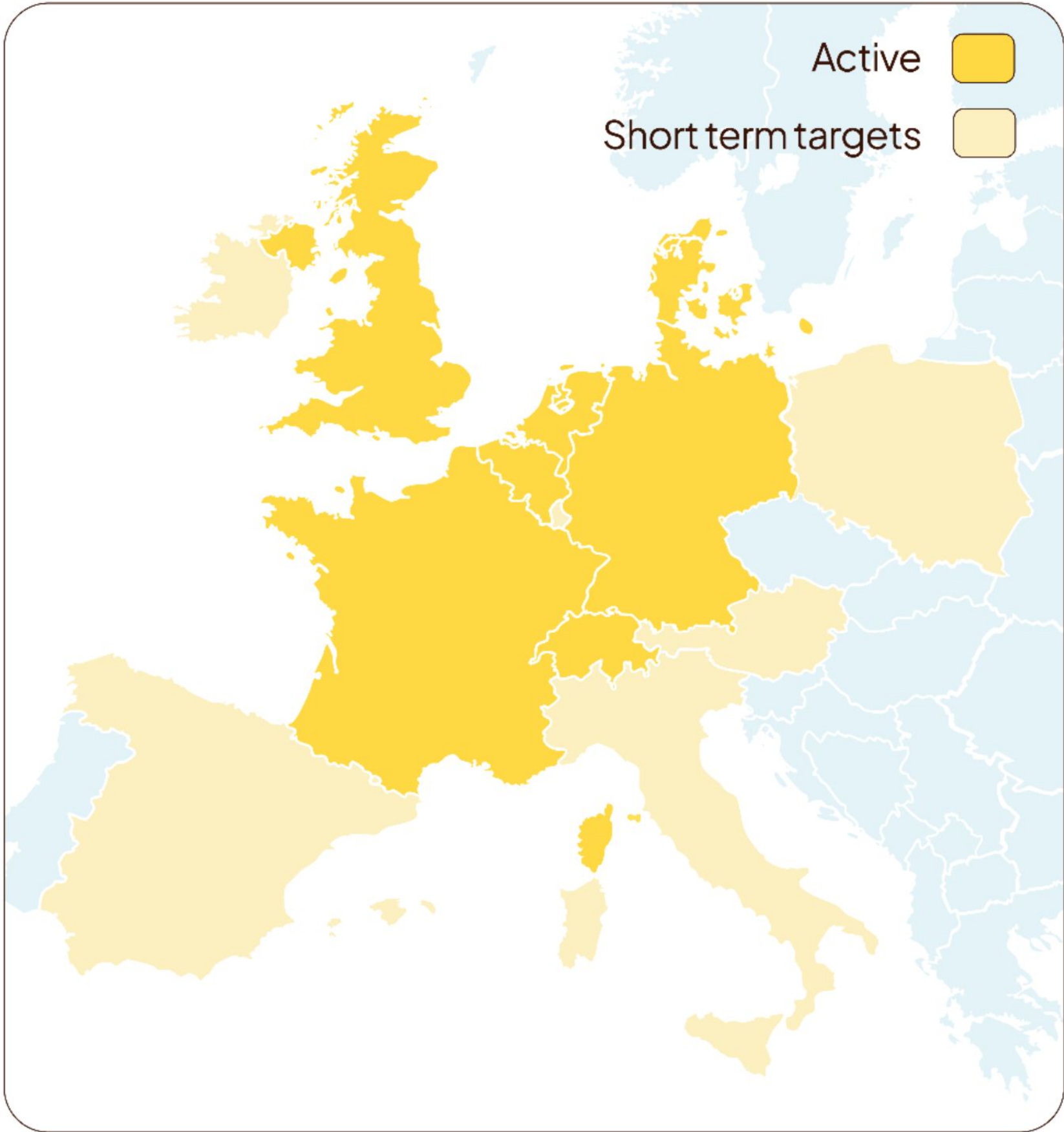
Combined, we expect this to fund at least a considerable part of further expansion beyond 2025

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	150KW-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%



1) Charger = EVSE = Charging position

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

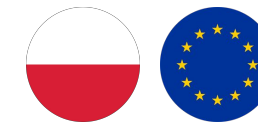
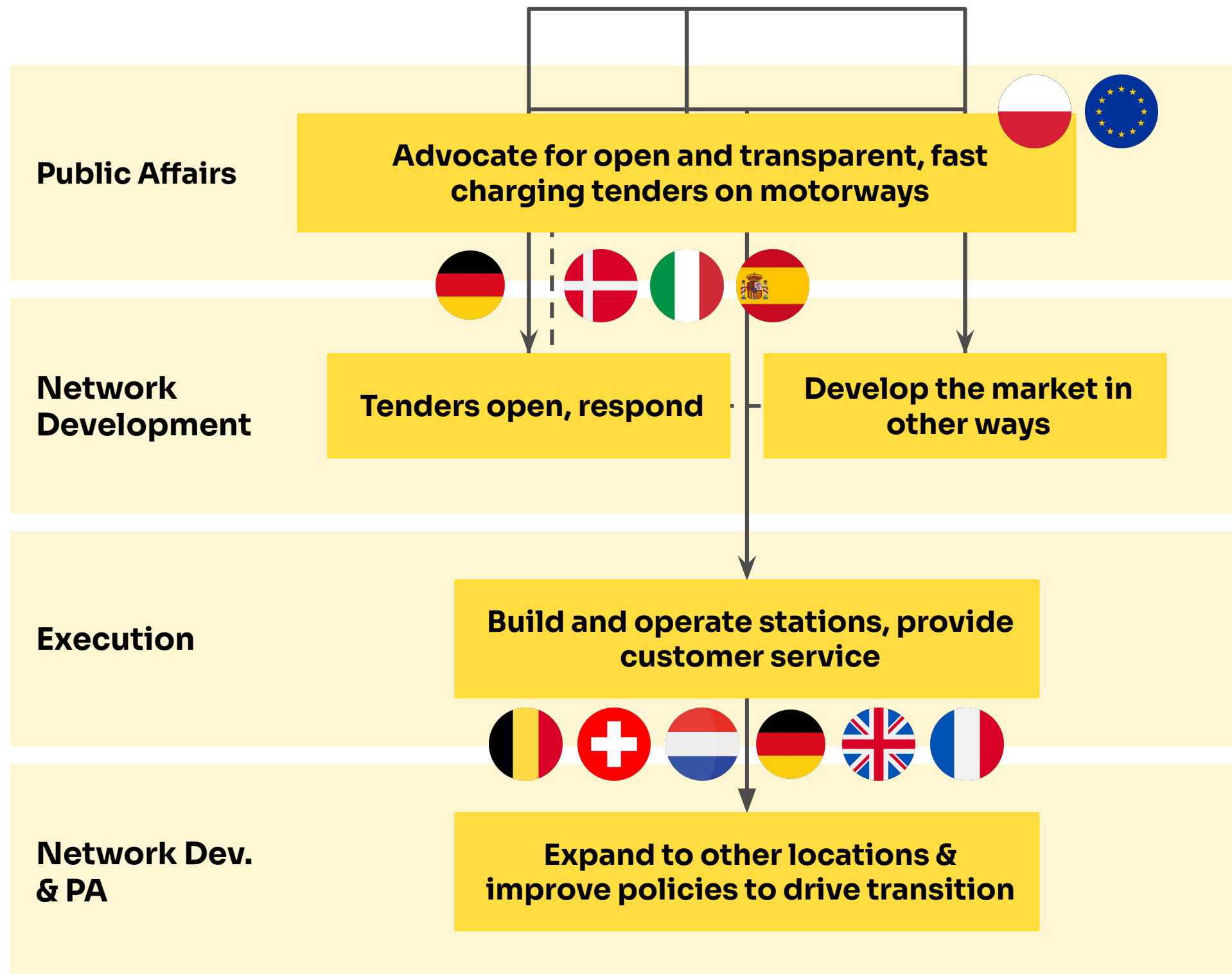
Understanding our footprint

- 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 3¹

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](#))

Fastned is closely following all the relevant opportunities across Europe, to benefit from the rapidly developing fast charging market



Discussing with multiple countries across Europe how to support the adoption of BEV through the roll out of fast charging infrastructure



Separate tenders for fast charging locations already conducted and more on the roadmap



New regulation pushing for tenders to be held on all service areas on the motorway network



Discussing with national authorities how to stimulate the development of the market through competition while in parallel pursuing other opportunities to develop charging infrastructure



In our existing markets, we work closely with governments to accelerate the transition to electric mobility



Dutch new policy criteria pushing for separate, dedicated, and sizeable service areas focussing on a future whereby EVs are starting to become the majority of traffic



Two large tenders won in Germany in 2023 and 2024

Recent Alternative Fuel Infrastructure Regulation accelerates tenders

CORE network

2025

400 kW of power output every 60km, including at least one recharging point of at least 150 kW

2027

600 kW of power output every 60km, including at least two recharging points of at least 150 kW

~1,000 sites

COMPREHENSIVE network

2030

300 kW of power output every 60km, including at least one recharging point of at least 150 kW

2035

600 kW of power output every 60km, including at least two recharging point of at least 150 kW

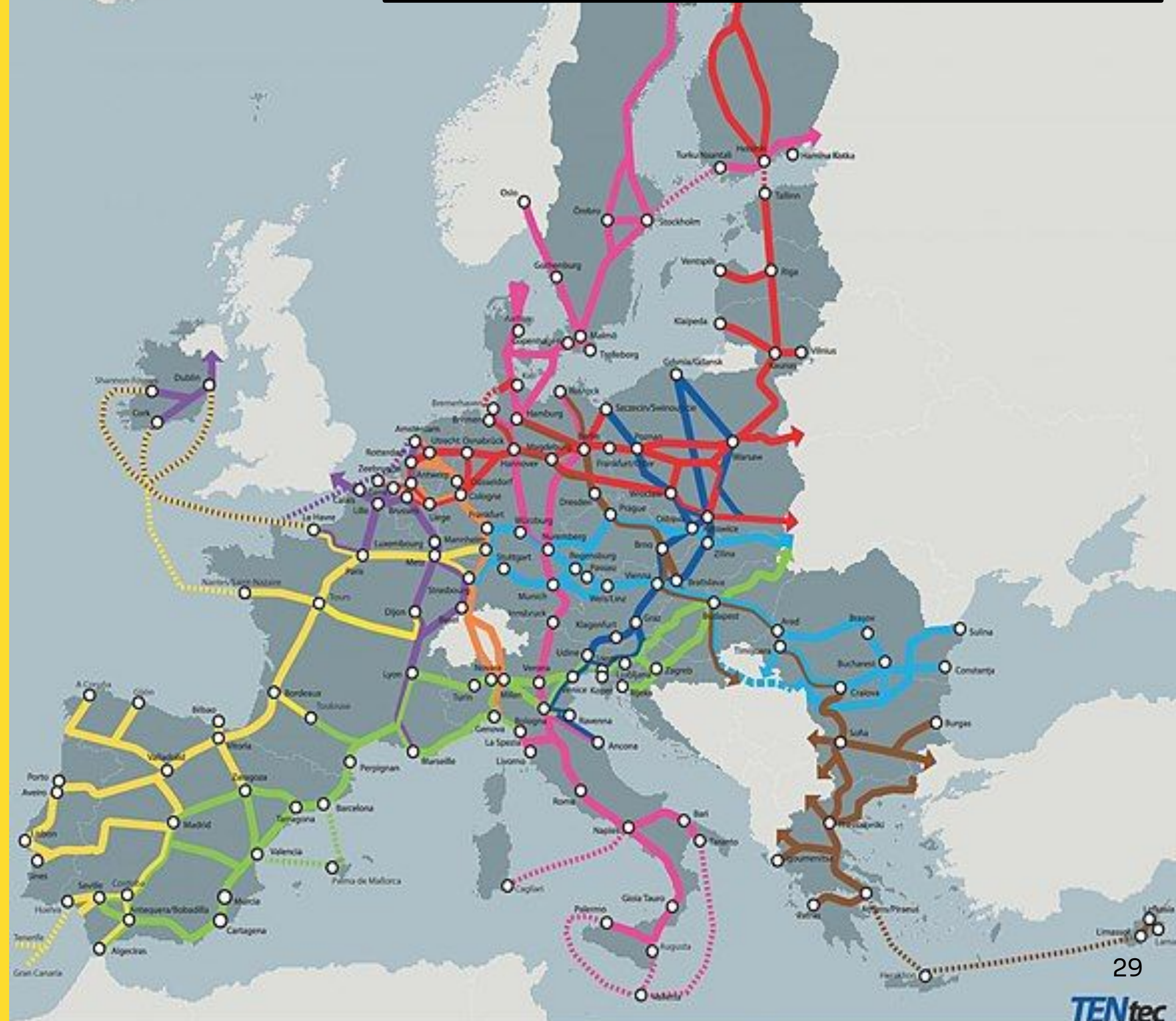
up to ~1,500 sites

TEN-T network size

~95,000 km

~ 1/3 CORE

~ 2/3 COMPREHENSIVE



The future of service areas in Europe

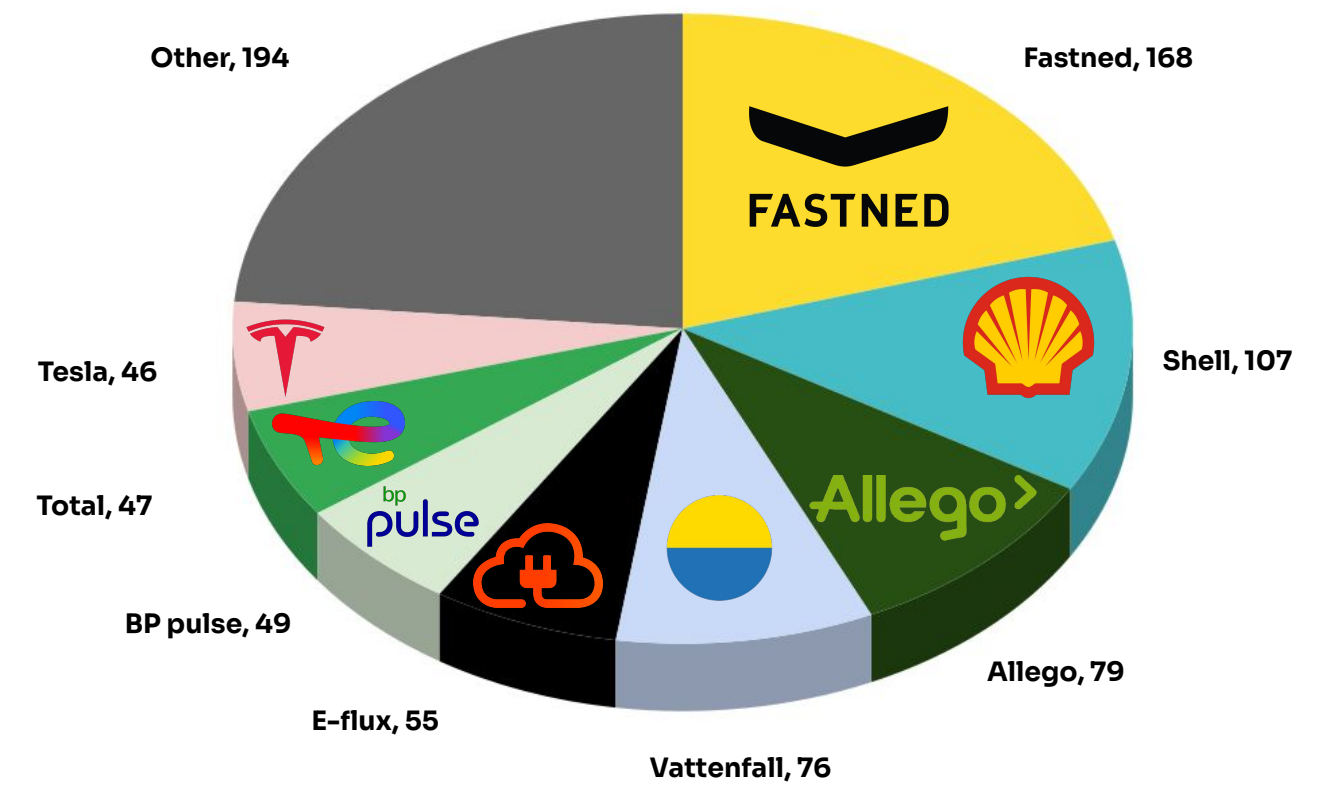


- ☺ In Q1 2023, Fastned won first ever fully dedicated service areas tender
- ☺ Fastned was able to prove its concept against multiple competitors
- ☺ Gentbrugge (Belgium) tender gives us a glimpse into the future of service areas
- ☺ Dutch new service areas policy proposal advocates for a similar structure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

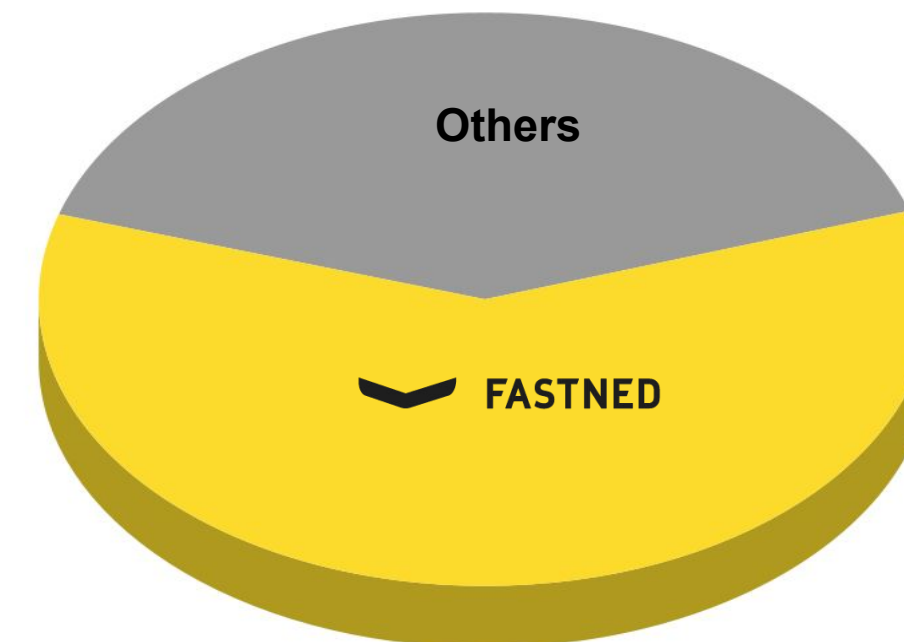
High traffic locations capture fast charging volume

- 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 volume²
- 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 locations¹



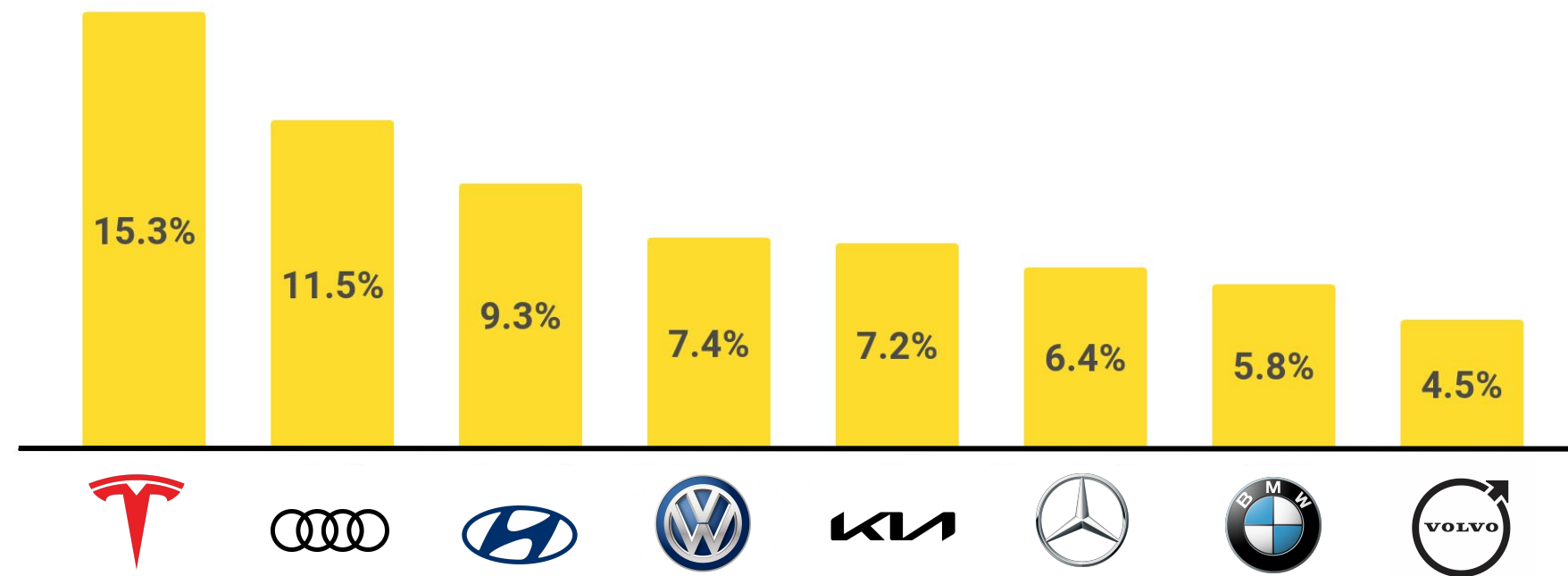
NL fast charging share²



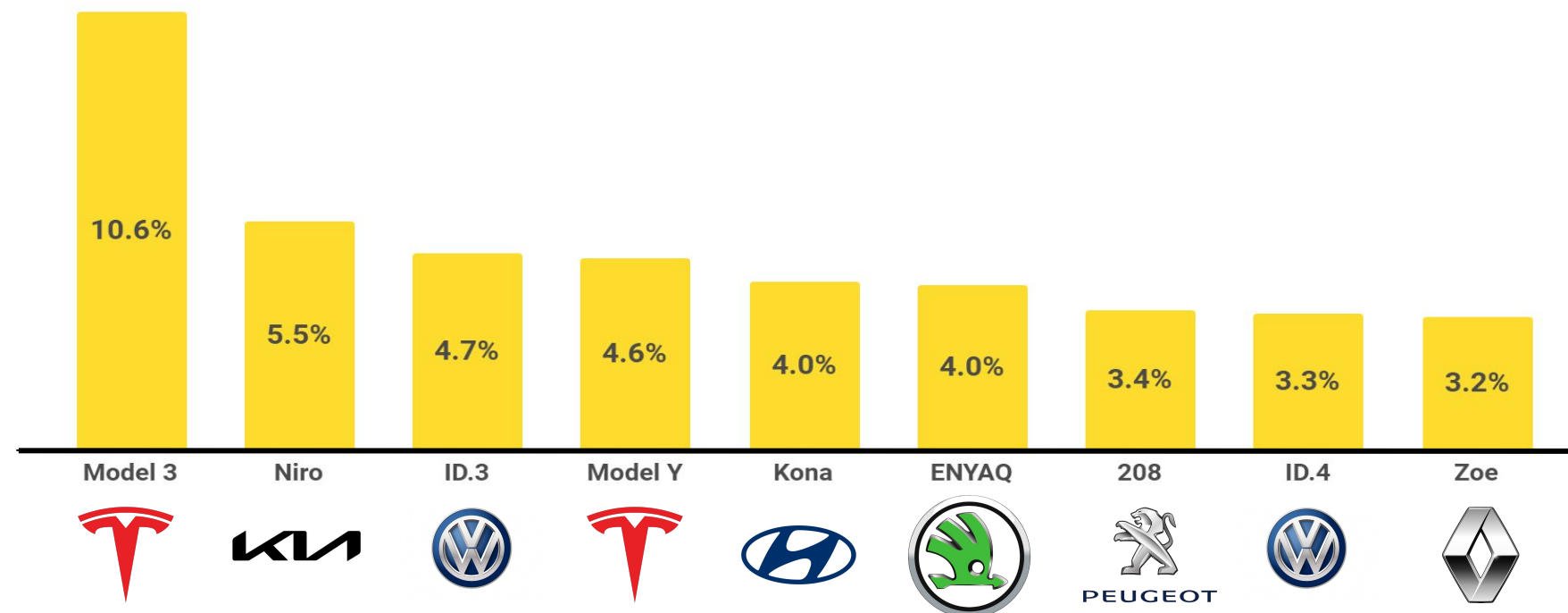
Sources: January 2024 1) Ecomovement 2) Source: Energy provider, volumes exclude Tesla location volumes

Who charges at Fastned?

Total all time kWh charged at all Fastned stations



Total BEV model fleet share in the Netherlands



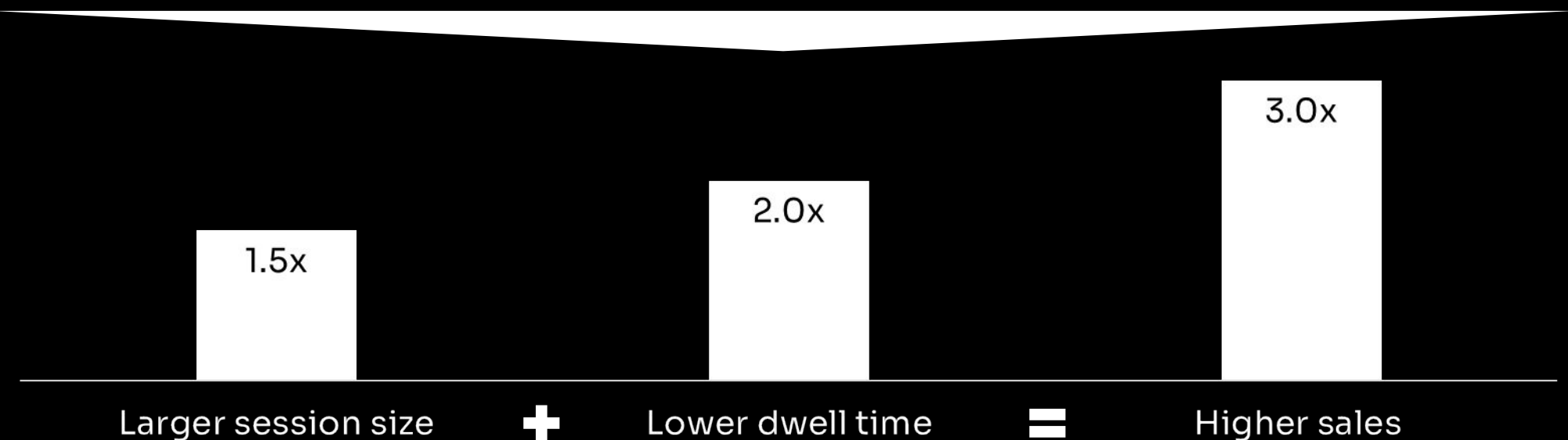
- Measured as % of kWh charged by customers using the Fastned app
- Major BEV manufacturer Tesla also the most common sight at our stations
- 'Long range' BEV's topping the list of most kWh per car model debunking the myth that long range cars don't do fast charging
- Fastned's customer base is representative of the BEV fleet share in the Netherlands

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.

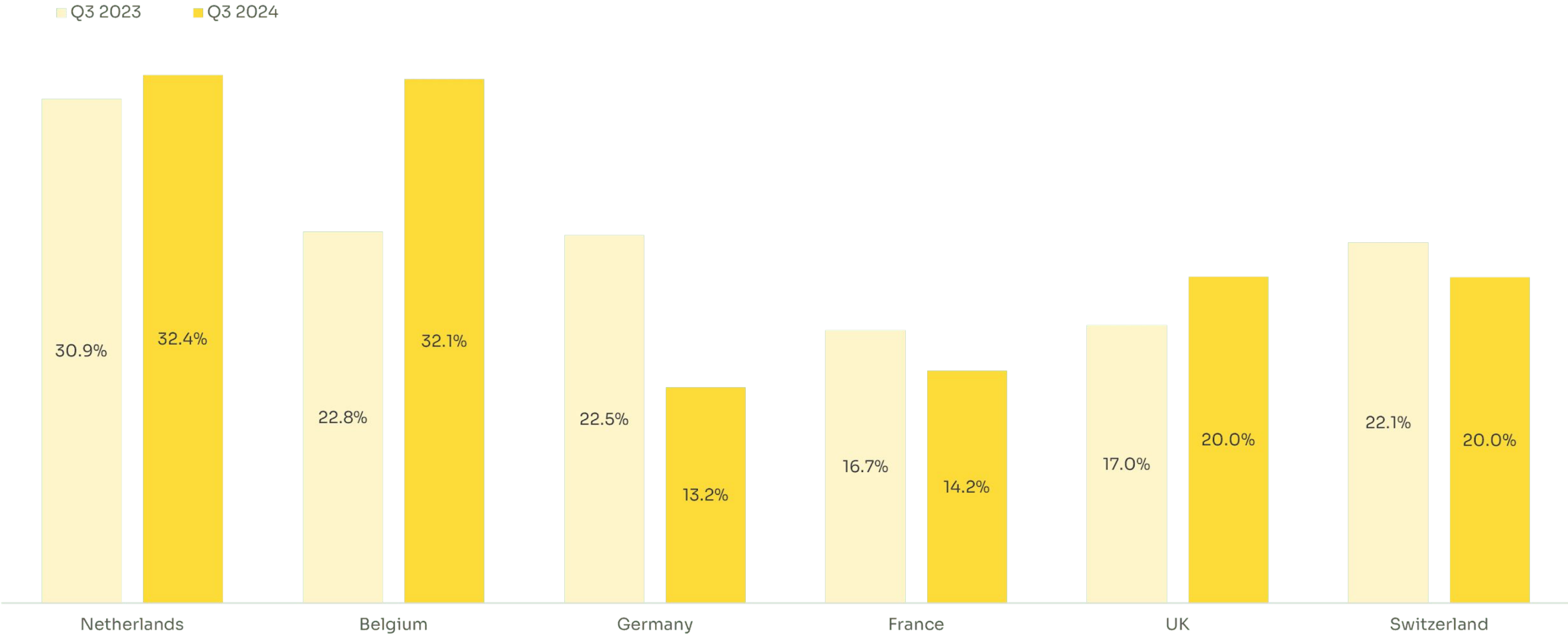
2030 business case comparison	MSAs	Supermarket
Daily traffic	30,000	1,000
BEV penetration	~20%	~20%
Daily BEV traffic	6,000	200
Capture rate	2.5%	20%
Sessions / station / day	150	40
State of Charge	25%	50%
Battery size	69 kWh ¹	69kWh ¹
Maximum session size	52 kWh	35kWh
Dwell time	15 min	30 min ²
Maximum charger speed	207 kW	69 kW
Utilisation rate	25%	25%
Max. annual per charger throughput	453 MWh	151 MWh
Max. annual revenue per charger³	€227k	€76k
Max. annual revenue per station	€1,417k	€252k



BEV sales in Fastned's key markets



BEVs as a % of total car sales¹

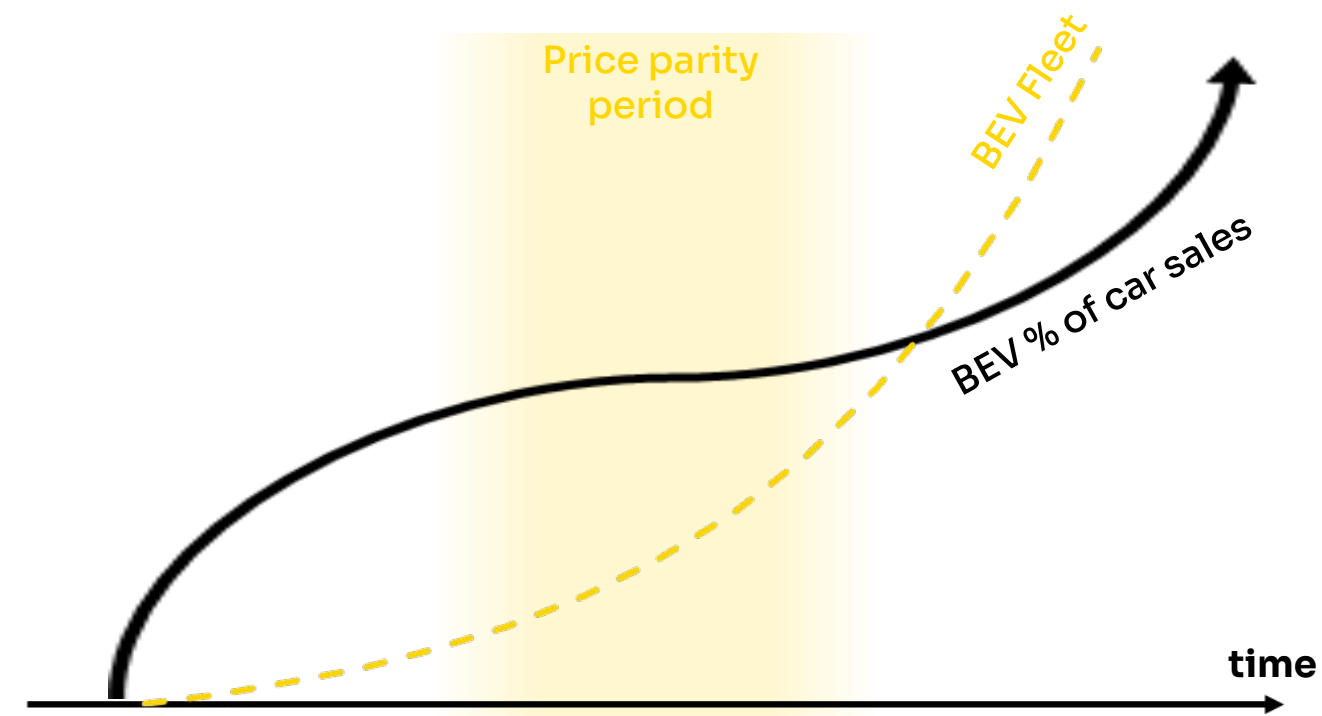


¹[ACEA - Jul-Aug data](#)

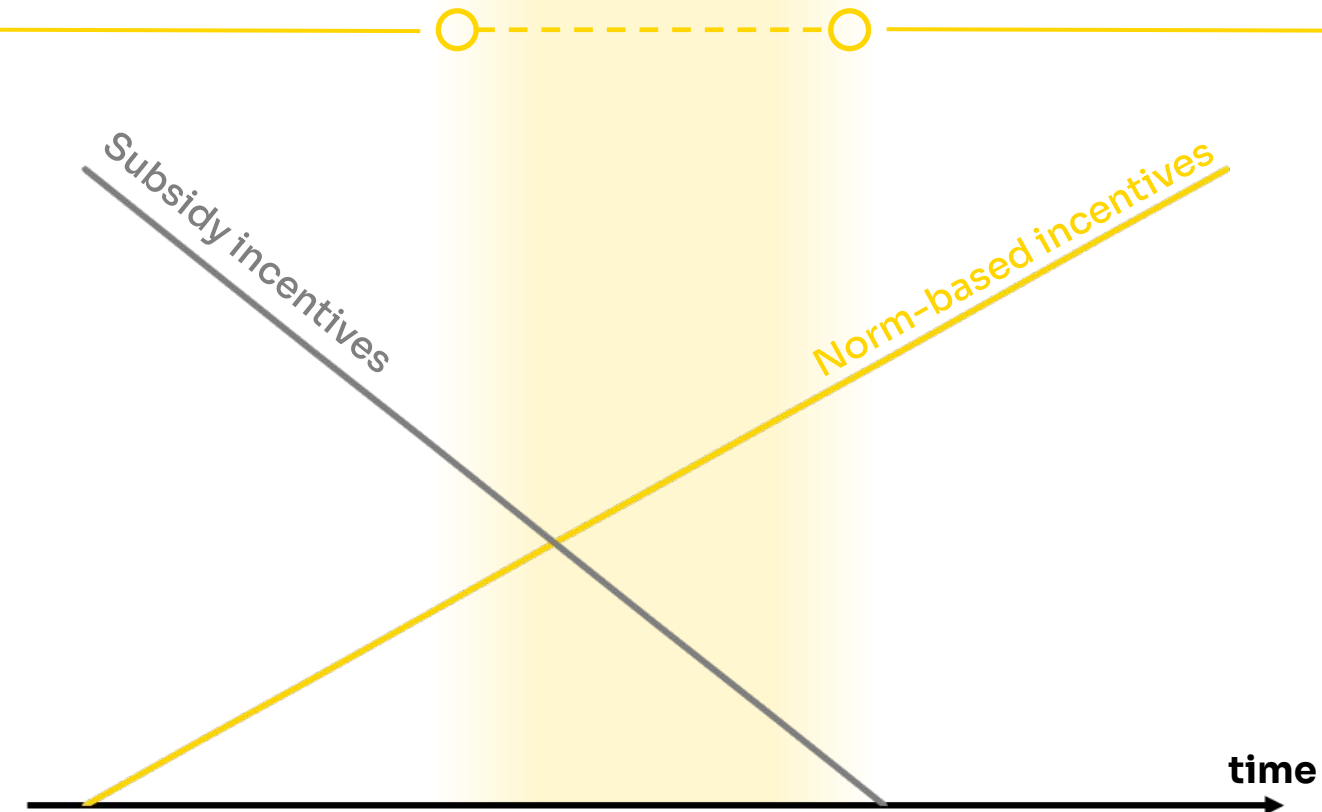
The twilight zone – in the price parity period



Tesla Model Y ~€45,000



Renault 5 ~€25,000



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

More and more trucks are coming to the roads



We are preparing to cater for many of them





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