Accelerating eHDV adoption across Europe

Driving demand and building confidence

April 2026

Truck adoption

Electric heavy-duty trucks are gaining momentum in leading European markets, moving from pilot projects to early large-scale use, supported by policies, incentives, and charging infrastructure. However, progress varies between countries, and the recent energy crisis has highlighted Europe’s dependence on imported fossil fuels.

Electric road transport is accelerating

From early adoption to market expansion at scale.

2026 Reality	6,039 Electric long-haul trucks	2.5% Market share	0.5% Megawatt Charging (MCS) Outlets
2030 Predictions	200,000 Electric long-haul trucks	40 % Market share	>50% Megawatt Charging (MCS) Outlets

Analysis is based on data from 14 key European markets.

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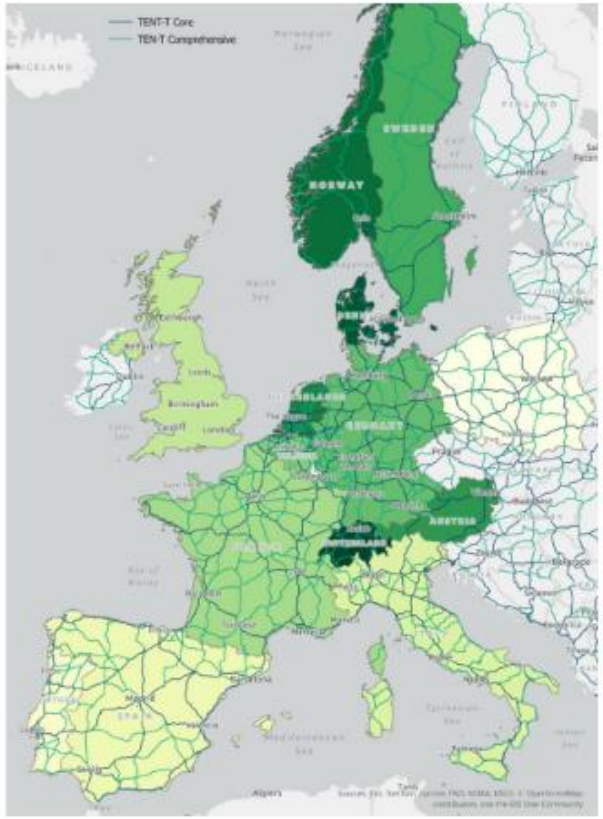
eHDV market uptake

- Electric truck adoption is gaining momentum, but scale is still limited
- Market growth is led by a handful of frontrunner countries
- Bridging the gap to mass adoption will require stronger policy and infrastructure alignment

eHDV (>16t) registrations in 14 Milence focus countries in 2025 and Q4 (absolute numbers and share of total new truck registrations)



New registrations 2025-Q4	eTruck % 2025 Q4	eTruck % 2025	eTruck 2025 Q4	eTruck 2025
Austria	12.2%	5.9%	191	405
Belgium	3.5%	2.5%	61	191
Denmark	15.1%	6.7%	110	277
France	2.9%	2.5%	293	861
Germany	3.8%	2.7%	498	1398
Italy	0.7%	0.3%	38	79
Netherlands	14.3%	9.4%	322	878
Norway	14.7%	10.9%	113	388
Poland	0.2%	0.2%	16	52
Portugal	0.3%	0.2%	5	9
Spain	0.4%	0.5%	32	138
Sweden	9.5%	8.5%	117	378
Switzerland	17.6%	15.3%	151	524
United Kingdom	1.7%	1.3%	166	461
Total	**3.3%**	**2.5%**	**2,133**	**6,039**

Policy alignment drives eHDV adoption

Strong, coordinated frameworks enable faster eHDV uptake, while fragmented approaches slow progress

eHDV adoption in Q4 2025 aligned with key policy levers (March 2026)

	Electrification rate 2025 Q4	Per km energy differential	Purchase subsidy	Km road toll differential	% of AFIR 2030 target power installed
Austria	12.2%	€ 0.23	1.0	€ 0.25	5%
Belgium	3.5%	€ 0.19	0.0	€ 0.17	4%
Denmark	15.1%	€ 0.16	1.0	€ 0.06	21%
France	2.9%	€ 0.16	1.0	€ 0.00	4%
Germany	3.8%	€ 0.11	0.0	€ 0.32	3%
Italy	0.7%	€ 0.10	0.5	€ 0.00	1%
Netherlands	14.3%	€ 0.19	1.0	€ 0.14	27%
Norway	14.7%	€ 0.30	1.0	€ 0.00	11%
Poland	0.2%	€ 0.19	0.0	€ 0.00	0%
Portugal	0.3%	€ 0.26	0.0	€ 0.00	0%
Spain	0.4%	€ 0.16	0.0	€ 0.00	1%
Sweden	9.5%	€ 0.21	0.5	€ 0.00	14%
Switzerland	17.6%	€ 0.34	0.0	€ 0.96	10%
United Kingdom	1.7%	€ 0.09	1.0	€ 0.00	n.a.

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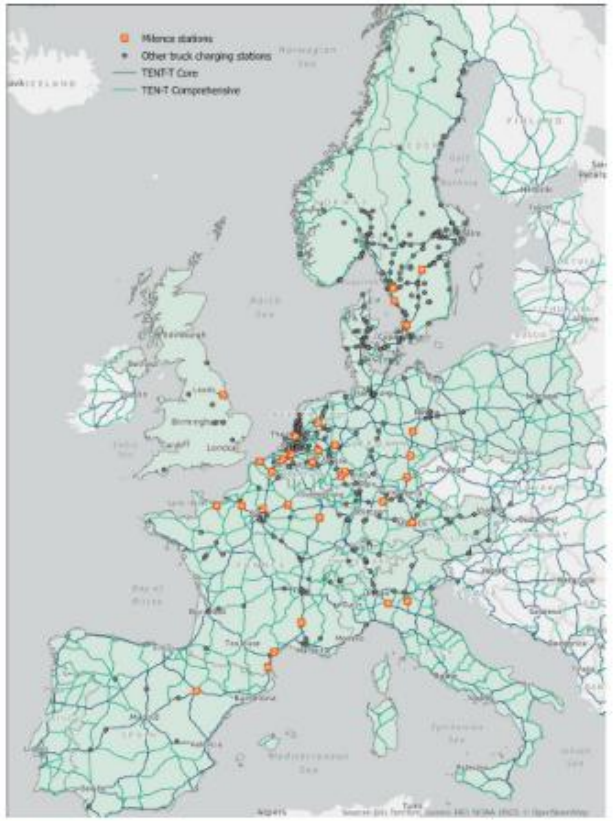
Infrastructure

Europe currently operates over 1,800 public charging points suitable for heavy-duty electric trucks, supporting an estimated 8,000 to 20,000 vehicles today. This is a solid foundation, yet far from sufficient for the projected 200K trucks on the road by 2030. To meet that demand, the number of high-capacity connectors must increase calling for focused investment along key freight corridors. The only way to scale is by increasing demand and ensuring utilisation.

Infrastructure enabling electrification at scale

- Public charging for trucks along major freight corridors is expanding rapidly
- 1744 connectors with a min charging power of 300kW across 14 markets
- Momentum is growing with fleets moving from pilot projects to mass-market adoption

truck-suitable[1] charging connectors in 14 Milence focus countries (snapshot February 2026)



Country	Sites	Charge-points
Austria	13	60
Belgium	11	82
Denmark	36	128
France	55	199
Germany	59	274
Italy	7	29
Netherlands	72	316
Norway	30	106
Poland	3	6
Portugal	-	-
Spain	8	33
Sweden	114	395
Switzerland	13	59
United Kingdom	6	54
Total	**429**	**1,744**

1 Charge points (connectors) with a minimum capacity of 300 kW, accessible to trucks without trailer decoupling and allowing for forward entry and exit.

A pan-EU public charging network is taking shape

The role of Milence

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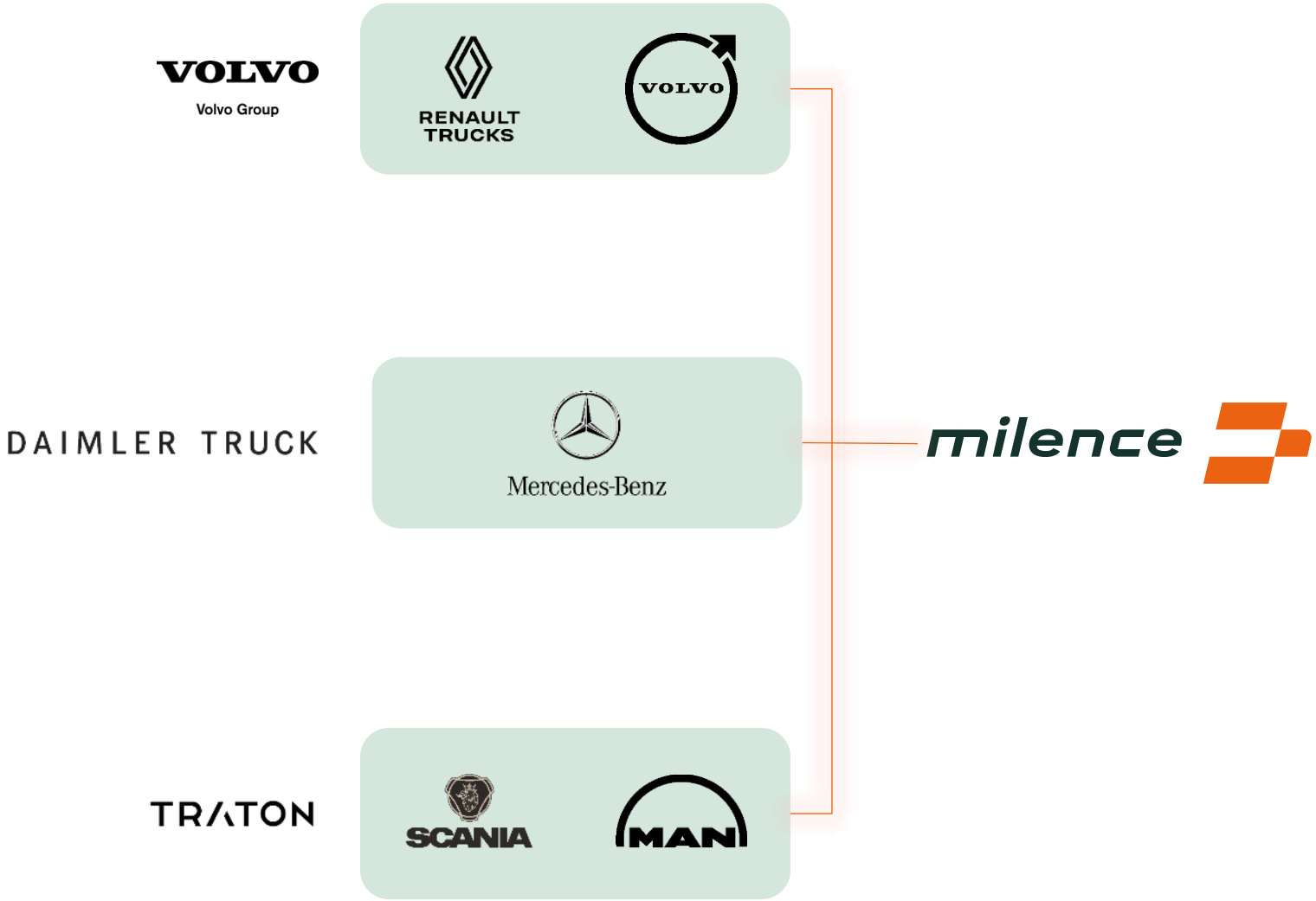
What started as a clear commitment to electrification & zero emissions road transport



Is now becoming a reality…

…by opening electric transport corridors across Europe

With 225 charging points Milence **powers**

23% of

available charging stops along major electric corridors.

(And 13% of entire truck charging market)

Our Mission

Accelerate the transition to electric heavy-duty vehicles across Europe

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Our Ambition

90 charging hubs operational by end of **2028**

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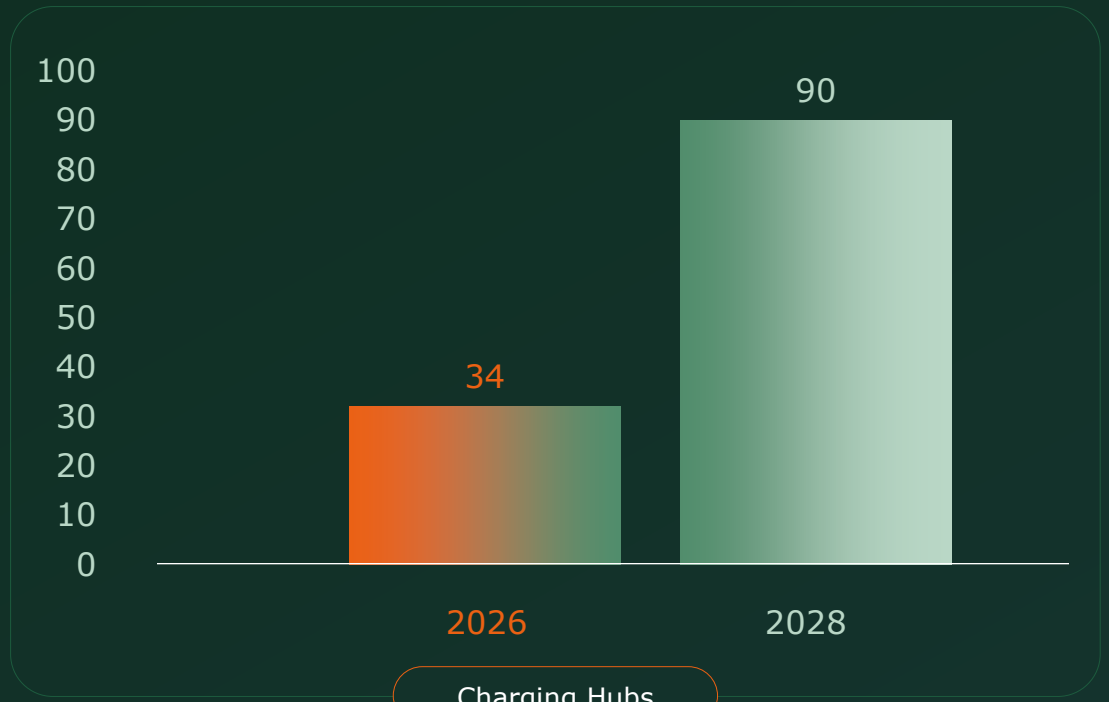
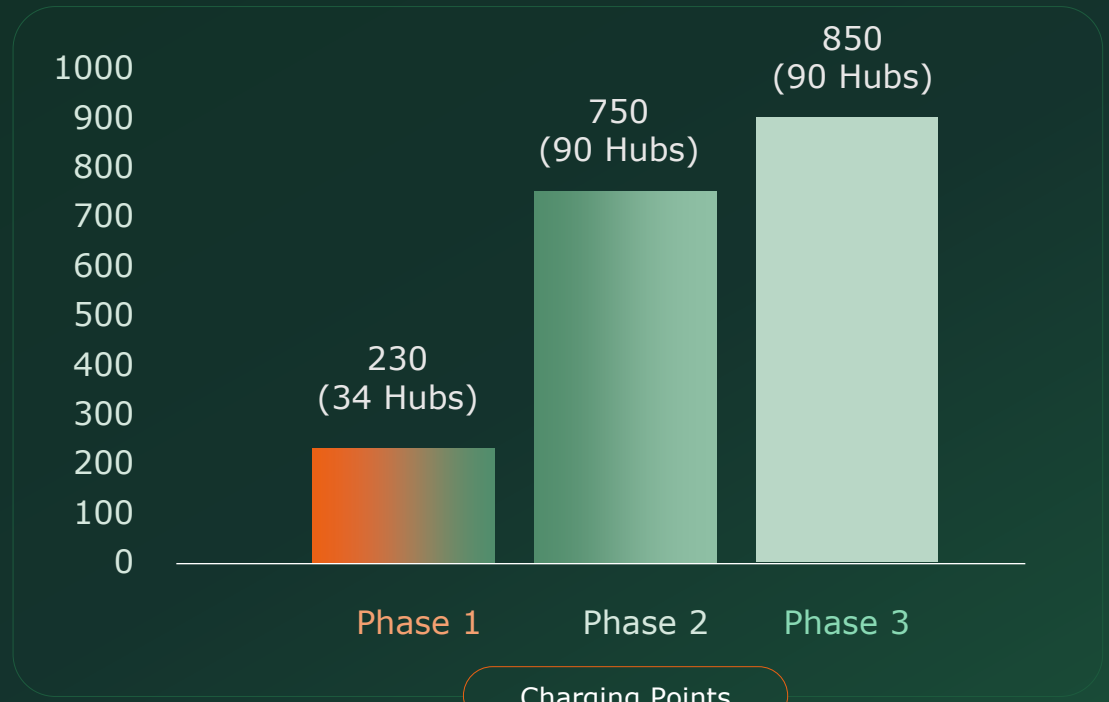
Our Ambition

Continue building in phases, staying at least one year ahead of the market, and scaling up as demand accelerates



Charging Hubs



Charging Points

\+ **We scale up the hubs as soon as the traffic increases**

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Our Network

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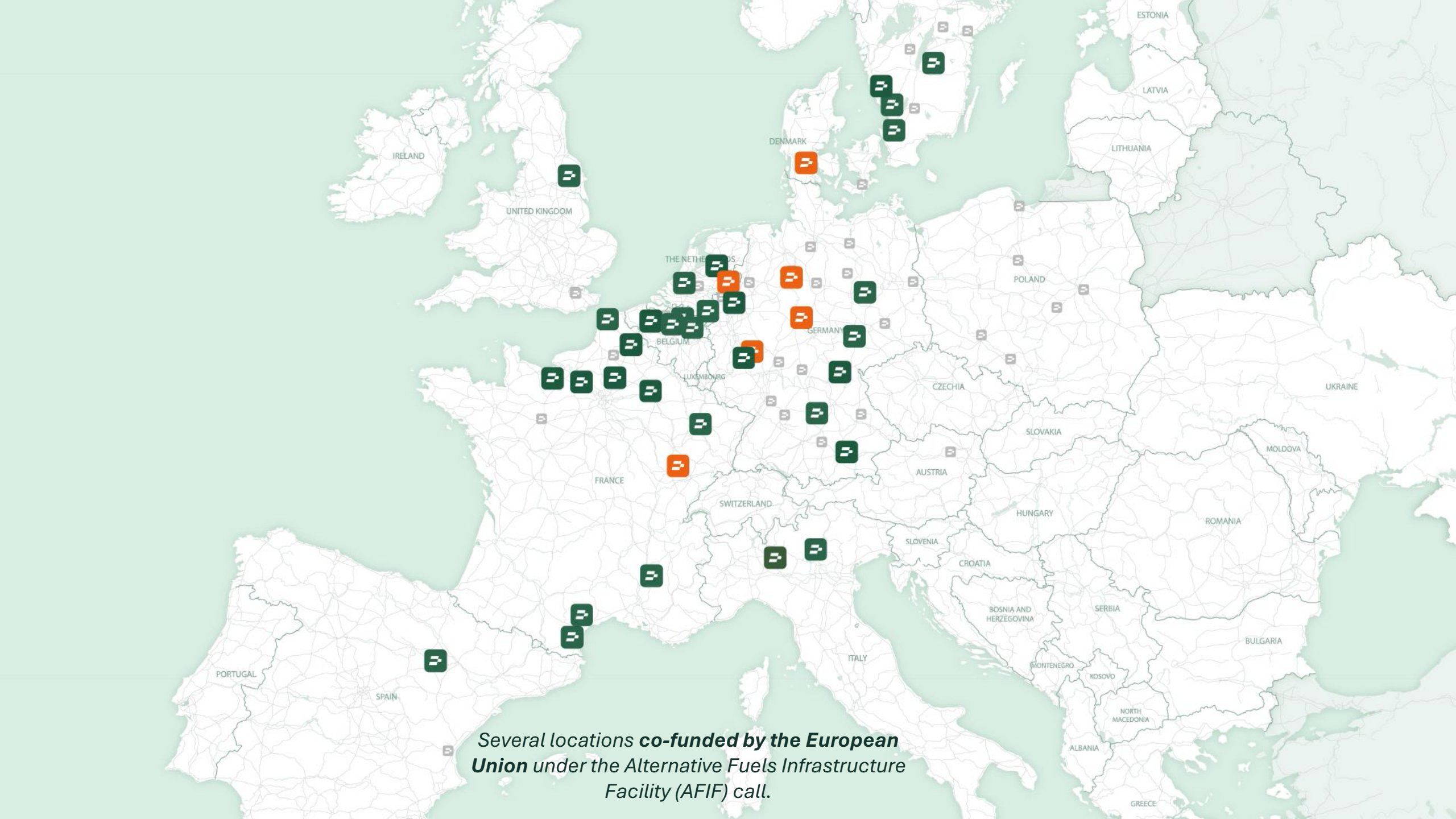
- Netherlands
- Germany
- France
- Belgium
- Sweden
- Austria
- Italy
- Spain
- Denmark
- UK
- Poland

Across 11 markets

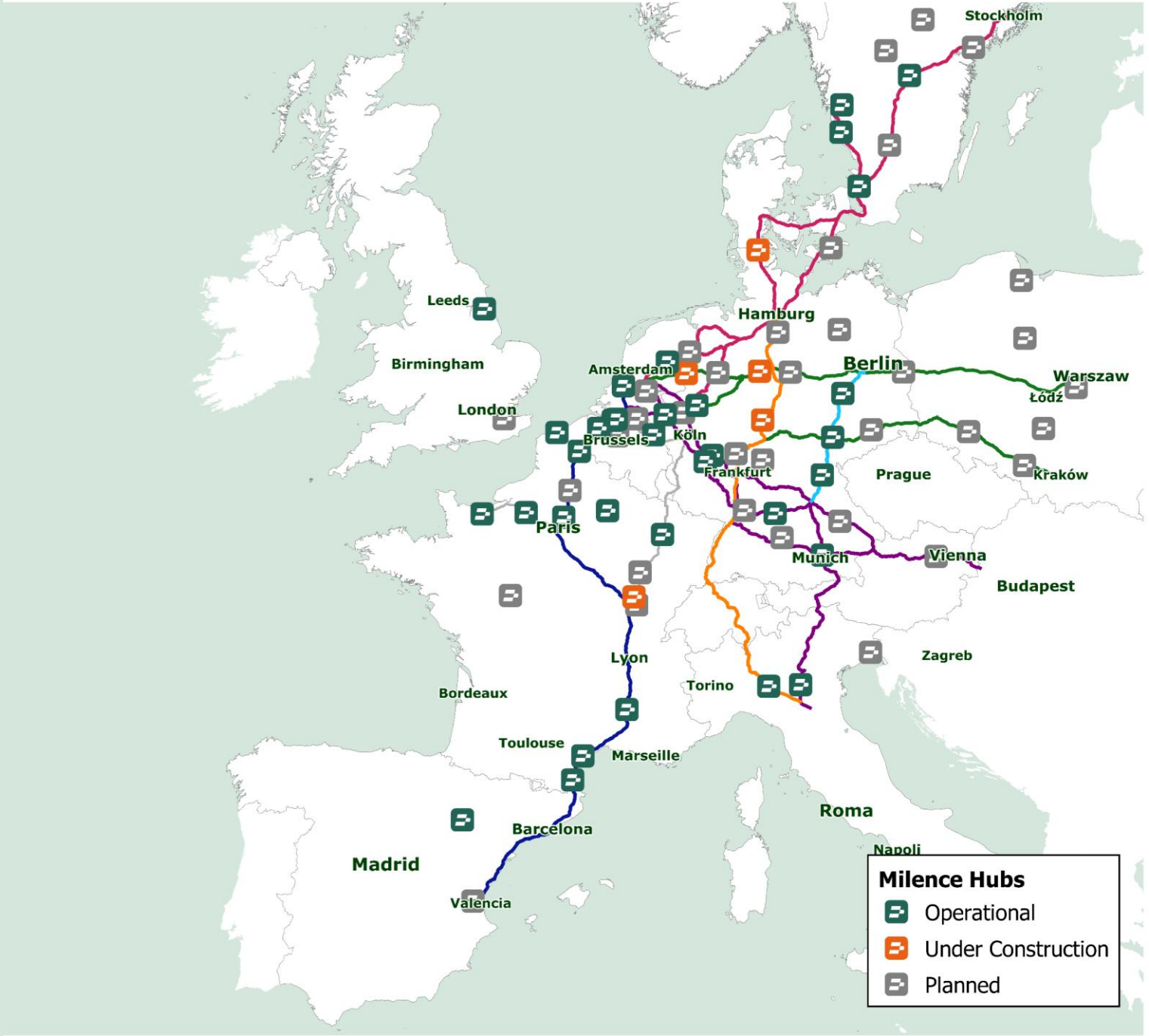


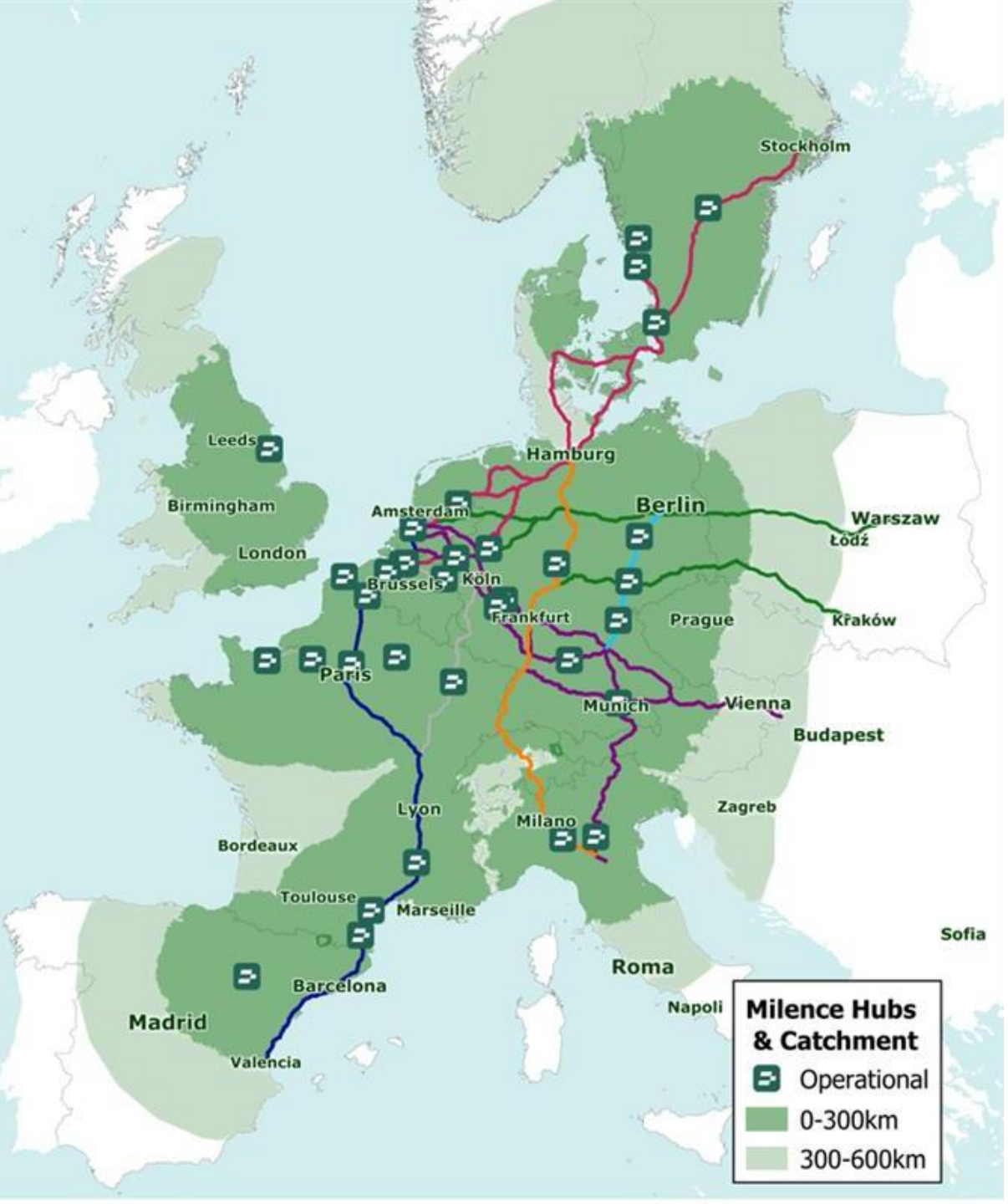
*Several locations **co-funded by the European Union** under the Alternative Fuels Infrastructure Facility (AFIF) call.*

Our approach

Follow a corridor first strategy expanding along the Ten-T corridors

- North Sea – Stockholm
- North Sea – Mediterranean
- North Sea – Vienna/Verona
- East – West
- Hamburg - Milano





+18 hubs will be added to the Milence network in 2026 with the plan to reach 50 operational hubs by end of the year.

2026 Roll out plan

- South = 15 hubs
- DACH = 16 hubs
- Nordics = 7 hubs
- Mid EU & UK = 12 hubs

50 hubs to be operational by 2026

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And offering the fastest charging solution

- **First Megawatt Charging System (MCS) deployed:** Chargers installed in the Port of Antwerp (BE), Zwolle (NL) and Landvetter (SE)
- **Revolutionising long-haul transport:** The technology reduced charging times to only 30-35 mins
- **Building Europe's first MCS corridor** from Antwerp to Stockholm

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The electric tour

THE POWER TO GO FURTHER TOUR

From Paris to Berlin

A clean transport corridor through Europe

Driven by

DAIMLER TRUCK | VOLVO | MAN | SCANIA | RENAULT TRUCKS

A clean transport corridor through Europe

Paris to Berlin, a 1,000 km crossing France, Belgium, the Netherlands, and Germany is one of many clean transport routes already available across Europe and a **strong proof point for real long-haul electric operations showing that is not only operationally possible but also economically viable.**

- Calculated **operating costs per truck show €0.995** per kilometer for electric, compared to approximately €1.003 per kilometer for diesel.
- Up **1,470 kg CO2 reduction** at 0.9 kg CO2 / km diesel emissions/truck when powered by renewable energy.

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Our Call to Action

Derisking the eHDV charging market by 2030

Derisking infrastructure investment

Key risks

- Low short-term utilization
- High upfront capital intensity
- Long lead times for grids/permits

Infrastructure rollout follows short term utilization

- No sufficient investment *ahead* of demand
- Lack of bankability leads to financing gap

What derisks this

- Public guarantee mechanism
- Policy certainty & implementation

EU derisking

Derisking vehicle investment

Key risks

- High vehicle CAPEX
- Uncertain residual value
- Charging availability concerns
- Uncertain TCO

What derisks this

- Purchase incentives / financing solutions
- Battery warranty and residual guarantees
- Long-term freight contracts
- Long-term operational incentives

Policy and market mechanisms must simultaneously derisk both infrastructure and vehicle investments to unlock scale

Market Outlook

Infrastructure first: We have shown how it works, now it’s about replicating and scaling.
Right framework: Financial incentives, toll exemptions, and support mechanisms are crucial to make investments and early electrification economically viable.
Joint action: Clear and coordinated collaboration is key to accelerating zero-emission road freight.

Let's charge some trucks!

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