



Driving electrification of eHDDV

Accelerating demand and building confidence

April 2026

A black and white photograph of a Milence 400kW electric vehicle charging station. The station is a tall, dark grey cabinet with a digital display and control panel on the front. A charging cable is plugged into the top. The station is mounted on a concrete base. In the background, there is a fence and some industrial buildings under a cloudy sky.

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

25,000

Electric trucks

4.5%

Market share

0.5%

Megawatt Charging (MCS) Outlets

2030

Predictions

>350,000

Electric trucks

40%

Market share

>50%

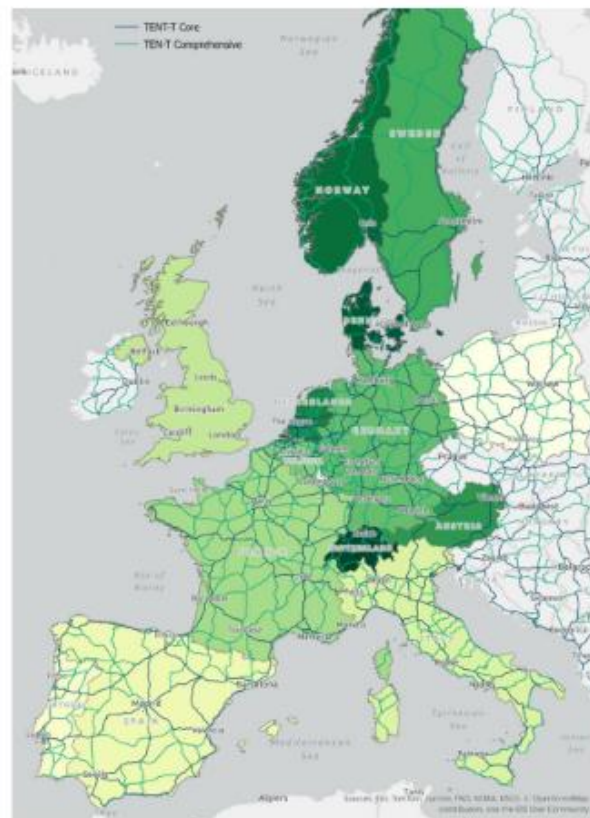
Megawatt Charging (MCS) Outlets



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.

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-suitable¹ 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

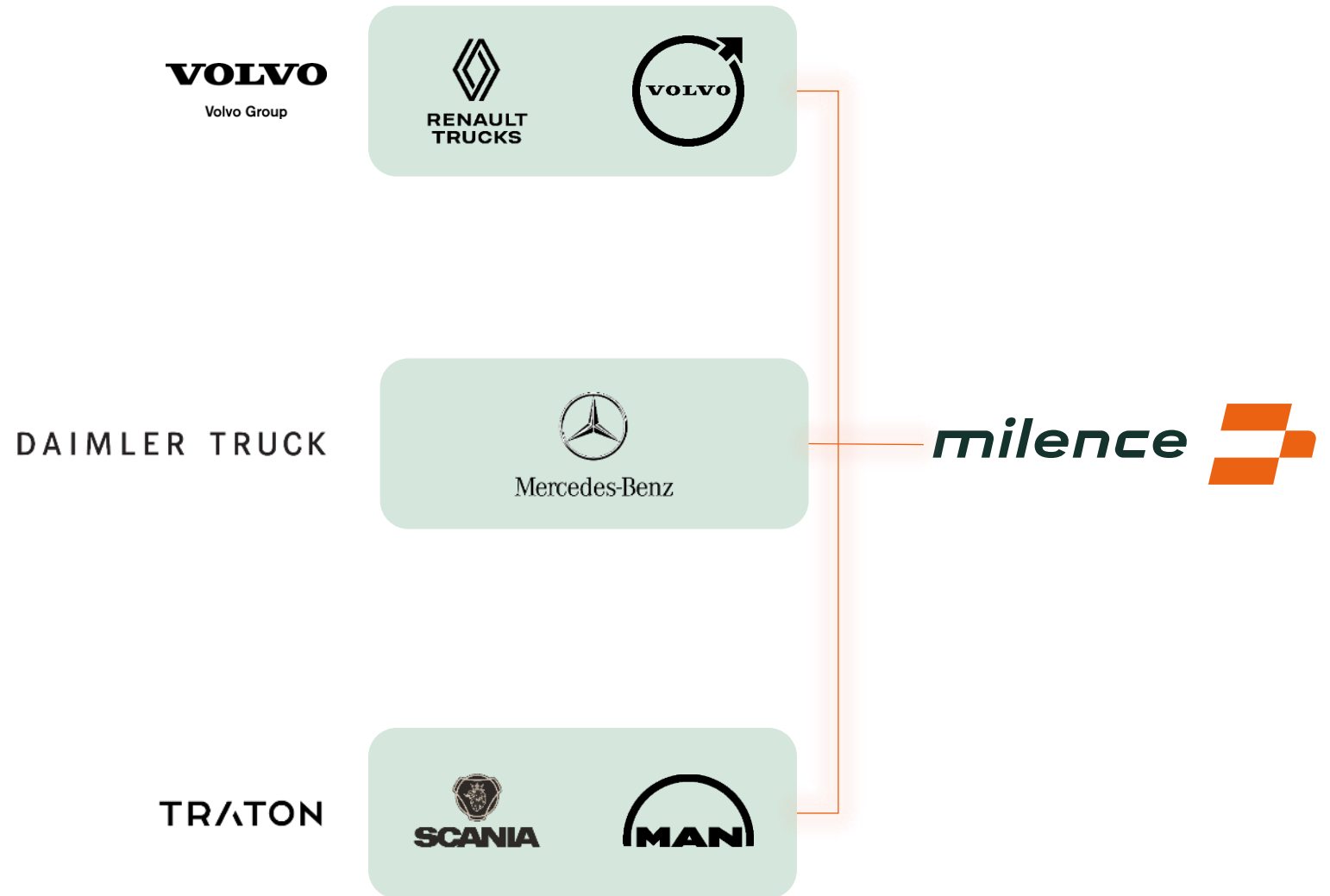
¹ Charge points (connectors) with a minimum capacity of 300 kW, accessible to trucks without trailer decoupling and allowing for forward entry and exit.



A pan EU public charging network is taking shape

The role of Milence

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



Is now becoming a reality...

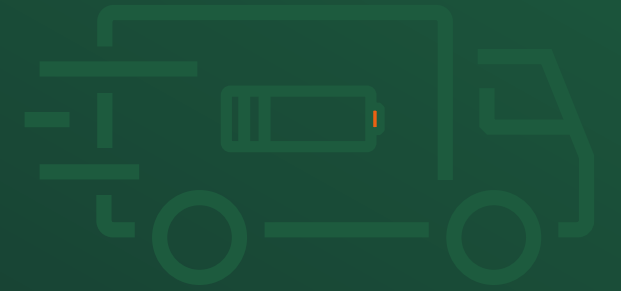
...by opening electric transport corridors across Europe





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





Our Ambition








90 charging hubs
operational
by end of 2028





Our Network



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



Across 11 markets



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

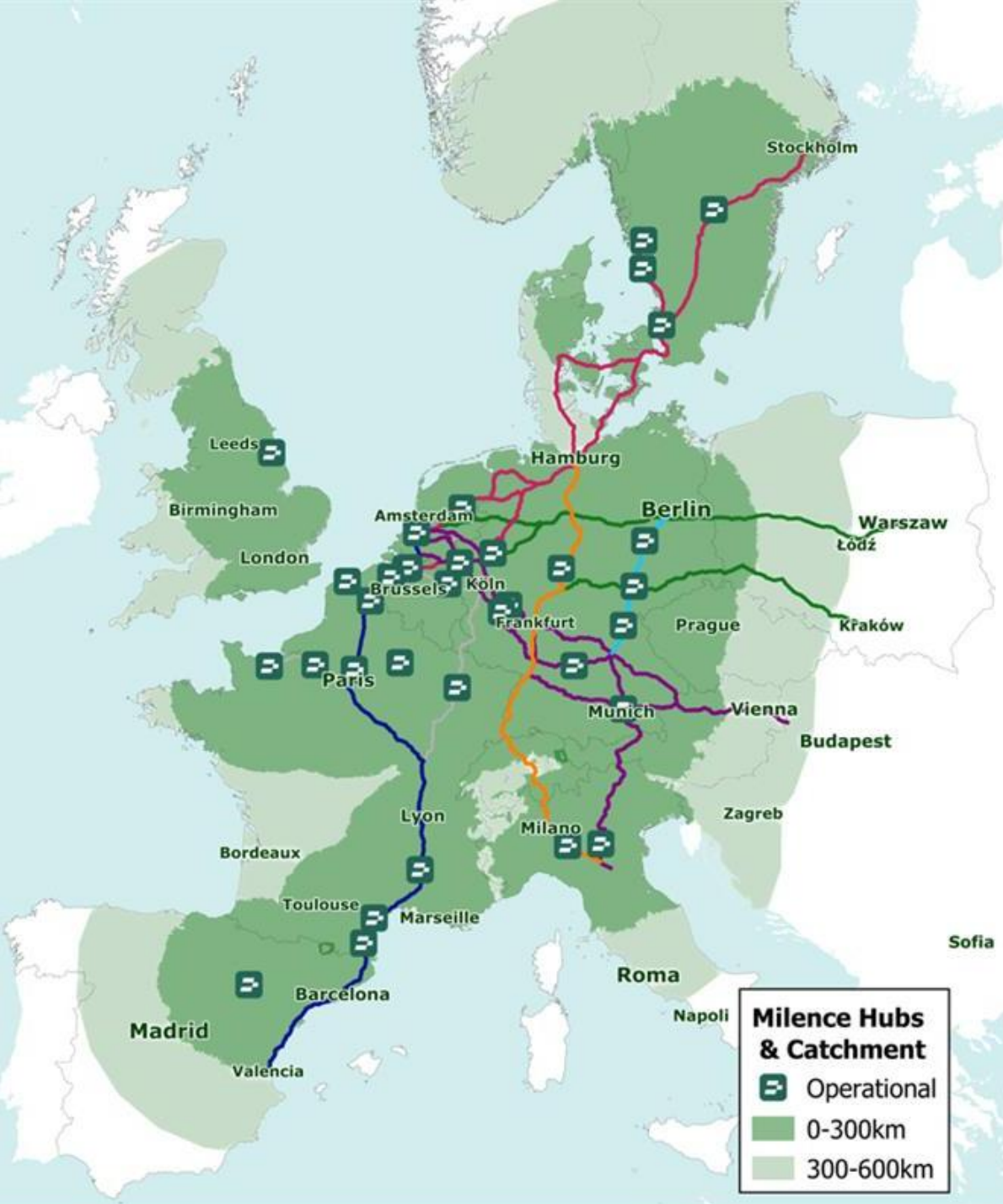
Our approach

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

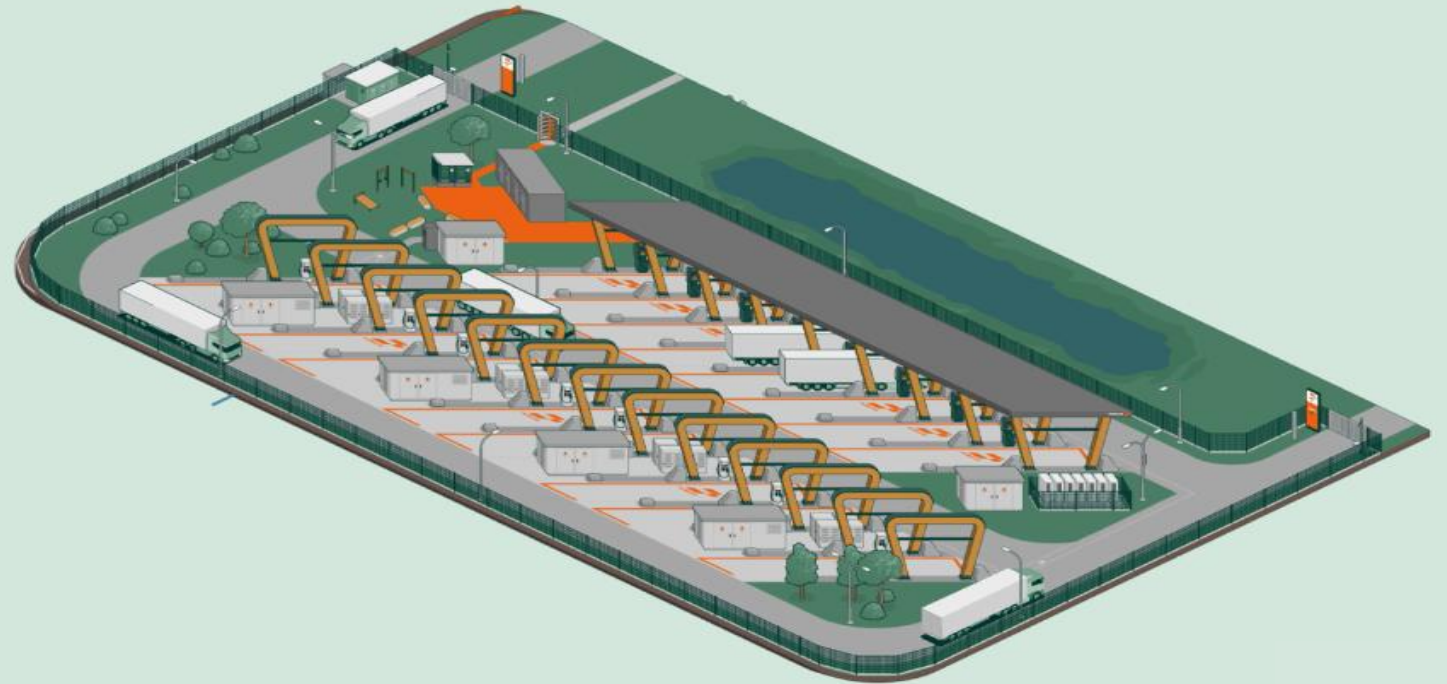
50 hubs to be operational by 2026



Our Solution

Skillful engineered and designed for trucks & drivers

- Optimising space is key for most locations
- Adapting to evolving technology, including advancements in charging standards, battery technology, and truck design
- Providing safety, efficiency and scalability



Offering the fastest charging solution



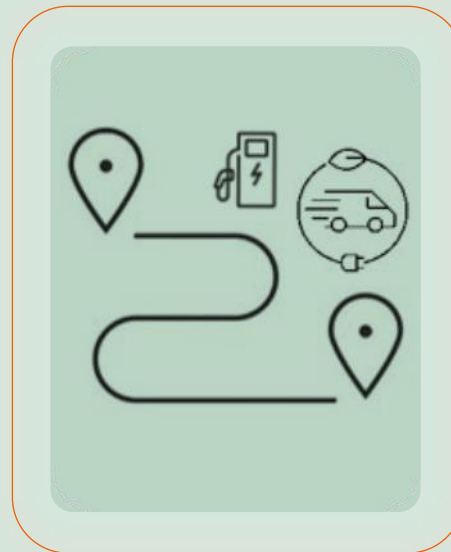
- **First Megawatt Charging System (MCS) deployed:**
Chargers installed in the Port of Antwerp (BE), Zwolle (NL) and Landvetter (SE)
- **Revolutionising long-haul transport:**
The technology reduced charging times to only 30-35 mins
- **Building Europe's first MCS corridor** from Antwerp to Stockholm

Competitive & transparent pricing

Tariffs in Belgium currently start at € 0.379 / kWh

Milence's charging tariffs follow a market-based structure designed to align with regional cost dynamics, operational realities, and deliver improved Total Cost of Ownership (TCO) for operators.

Transport company



eMobility Service Provider (eMSP)

Milence Charge Card

Direct payment (Payment Terminal)

Milence





Charging Hub Maasmechelen

Milence Charging Hub [Maasmechelen]



Charging

4x CCS, 400kW
Number of bays: 8



Amenities

Drive through parking
Vending machines
Toilet
Shower



Access and parking

- CCTV security
- Access gates

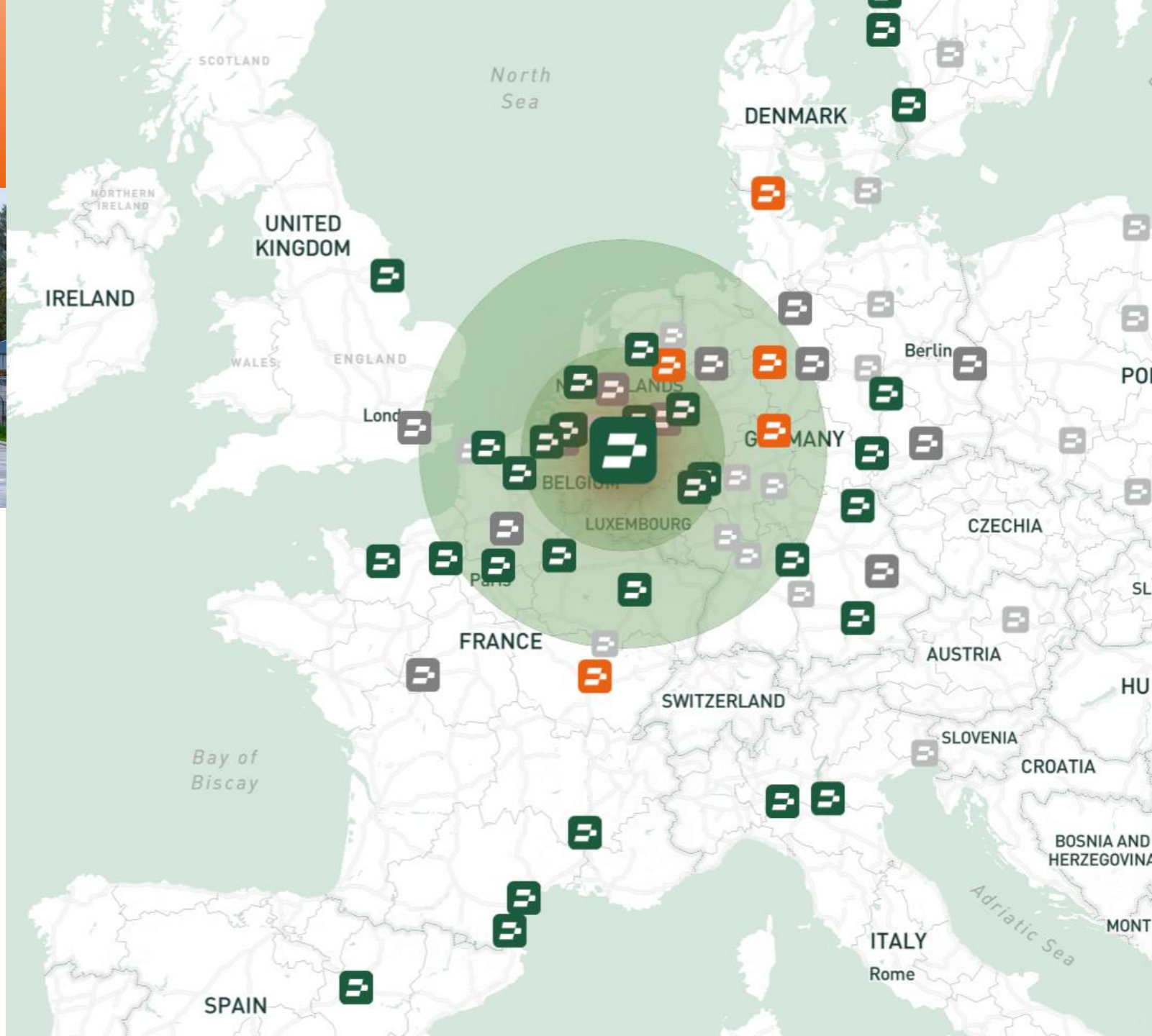


Payment options

- eMSP
- Milence app
- Direct payment terminal



Co-funded by the European Union under the Alternative Fuels Infrastructure Facility (AFIF) call.





Charging Hub Zwolle

Milence Charging Hub [Zwolle]



Charging

- 4x CCS, 400kW
- Number of bays: 8
- 1x MCS, 1400kW
- Number of bays: 1



Amenities

- Drive through parking
- Lounge
- Vending machine
- Toilet
- Shower



Access and parking

- CCTV security
- Access gates



Payment options

- eMSP
- Direct payment terminal
- Milence charge card

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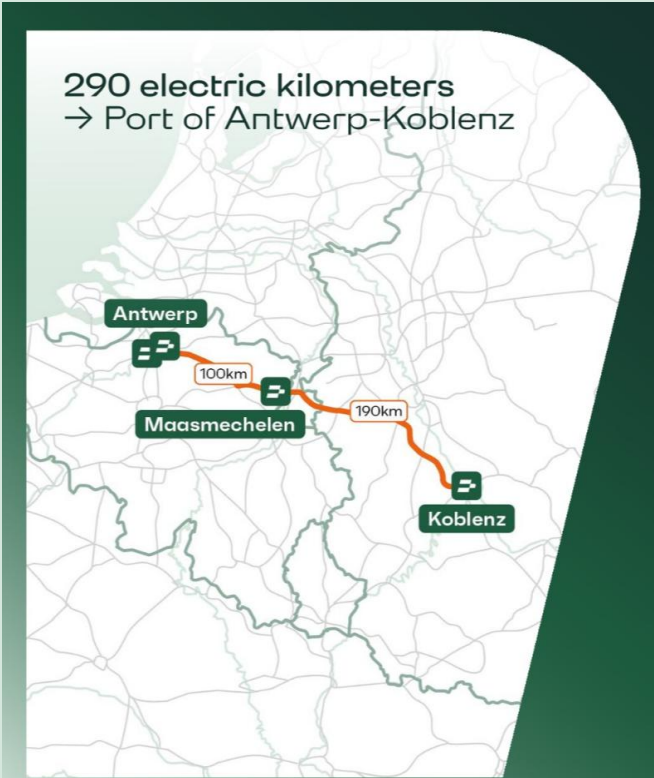
Clean Transport Corridors

Connecting Belgium to Europe

Blainville & Lyon to Ghent



Port of Antwerp to Germany



To Europe via Ghent & Maasmechelen



THE **POWER**
TO GO
FURTHER TOUR



From Paris to Berlin

A clean transport corridor through Europe

Driven by

DAIMLER TRUCK

VOLVO



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.

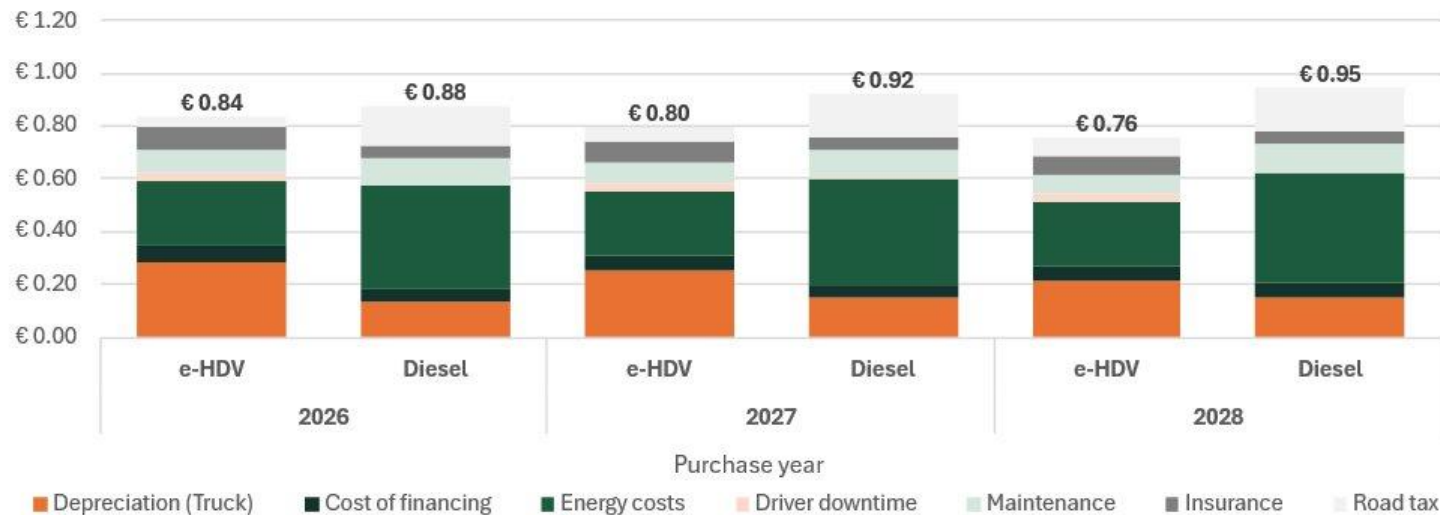
Positive TCO trend continues across key markets

Case study: Regional delivery Belgium

100,000 km/year
7-year life

75% depot charging and
25% public charging

TCO per km - Regional delivery in Belgium (Flanders)

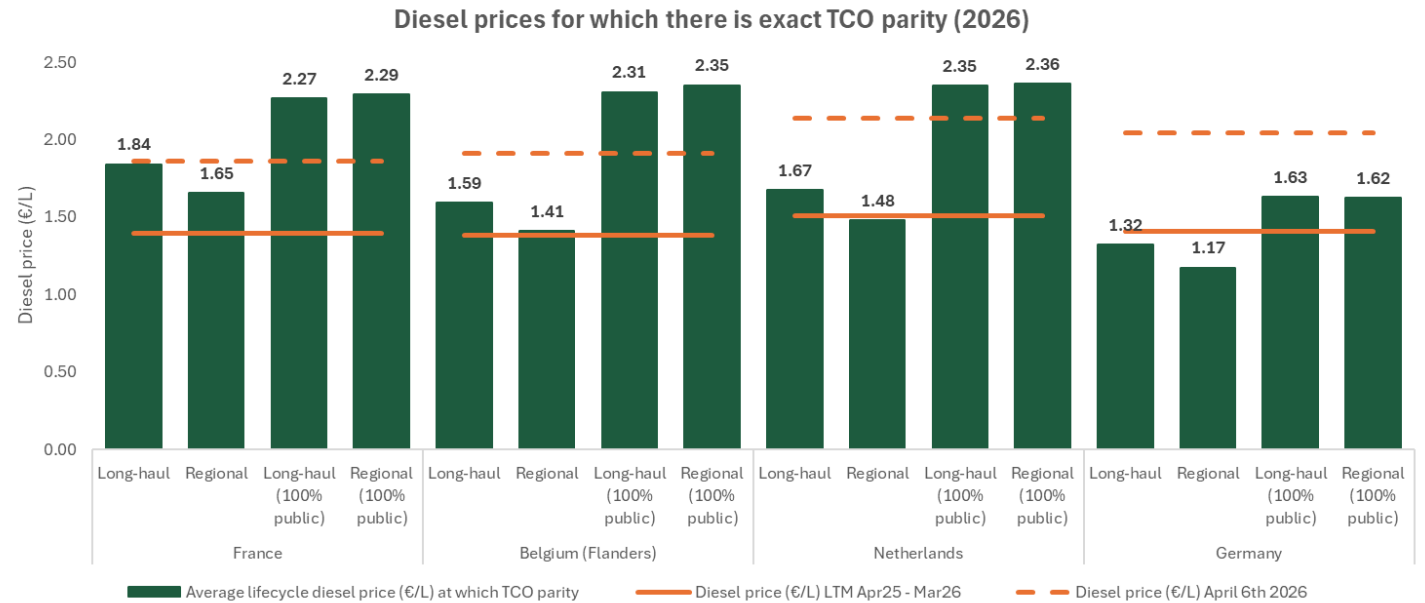


TCO positive case from 2026 onwards

- Driven by favorable depot and public charging rates on top of favorable Viapass exemption (CO2-based kilometer tolling)
- Case is calculated for Flanders, which is crossed in the Power To Go Further Tour

Positive TCO trend continues across key markets:

Recent developments have significantly impacted diesel prices while strengthening the advantage of eHDV.



Current diesel prices are strengthening business case for e-HDVs

- With the current diesel prices (observed April 6th 2026), all use-cases across geographies studies are TCO positive for e-HDVs
- Full reliance on public charging is economically more beneficial than operating a diesel truck in Germany

Let's
charge
some
trucks!