



Location study New brand Zoetermeer

Address : Hogerop 2711 PH Zoetermeer

Simulation for :

8 ultrafast charging points (maxpower :150 kW)

Brand : New brand



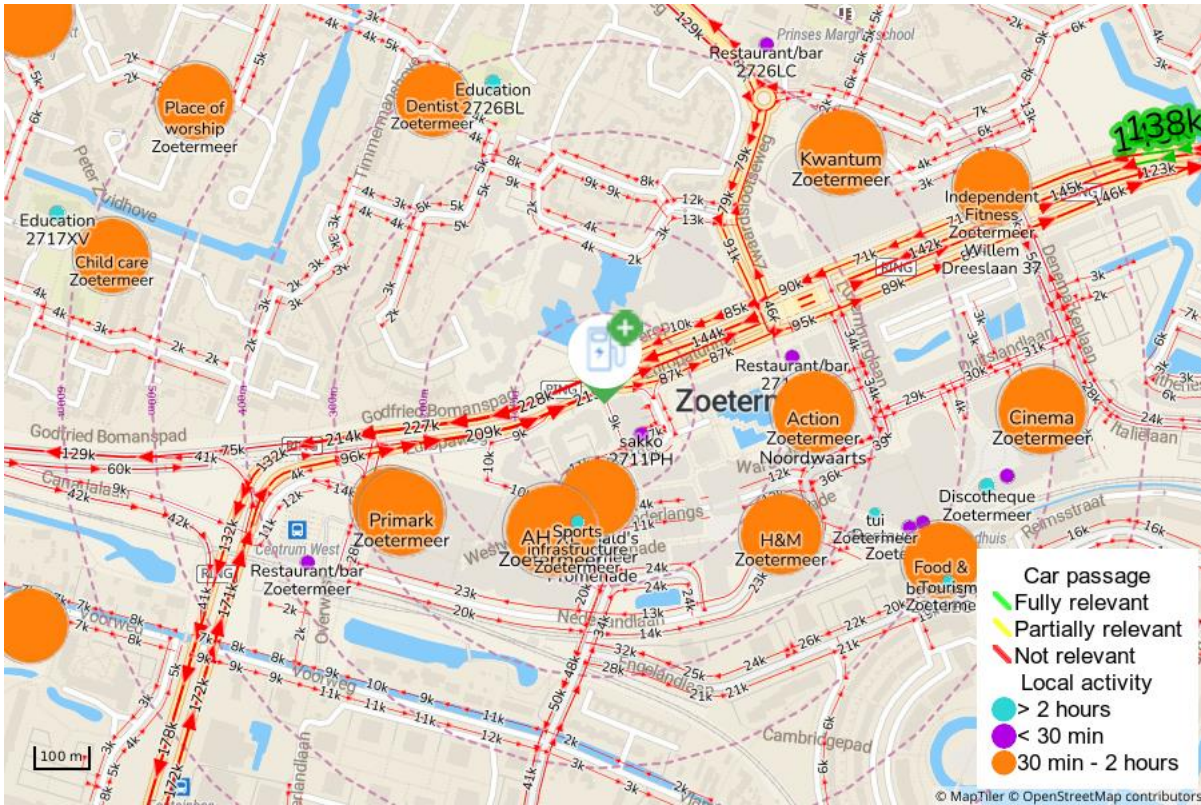
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1. Description of the simulation

In this report we show the result of a simulation with 8 ultrafast charging points (>150kW) of a charging station located at : Hogerop, 2711 PH, Zoetermeer, NL

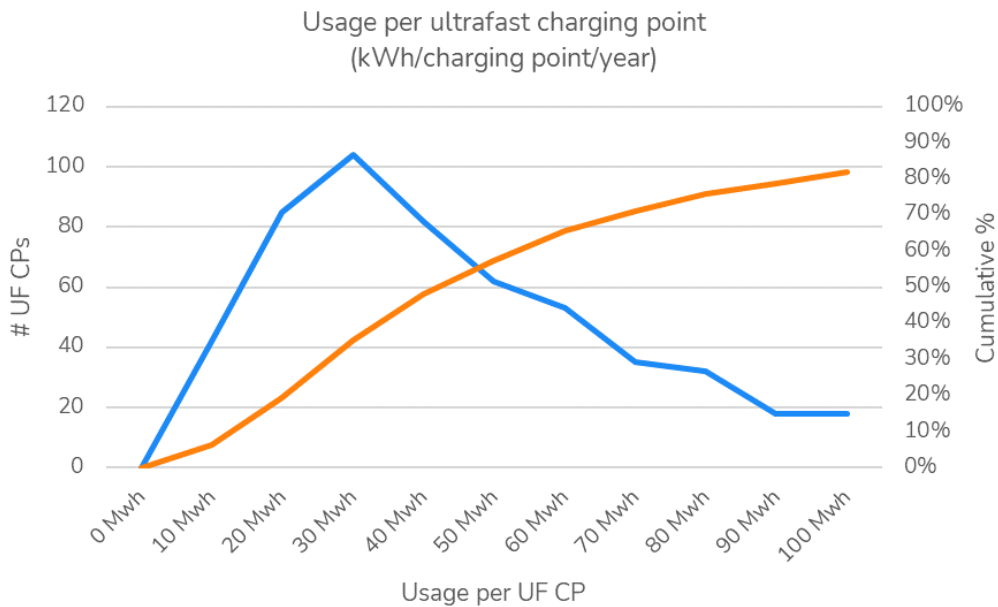


2. Predicted yearly consumption

Based on the market data, the model predicts a theoretical potential of **1.011.163 kWh/year (being 126.395 kWh/year per ultrafast charging point)** for this location.

In the following graphs, we compare this result with all other sites in the country.

For the 430 existing sites with only ultra-fast charging points, the predictive model gives a median consumption of 47.3 MWh per year and per ultra-fast charging point.

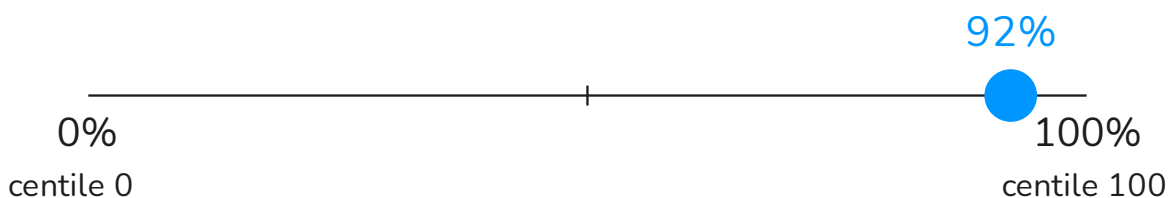


The following graph compares the expected performance (per ultra-fast charging point and per year) of the site under investigation with all existing sites in the country.

The percentile “0” corresponds to the existing site with the lowest usage, and the percentile “100” to the site with the highest usage. The blue dot corresponds to the performance of the location studied in this report :

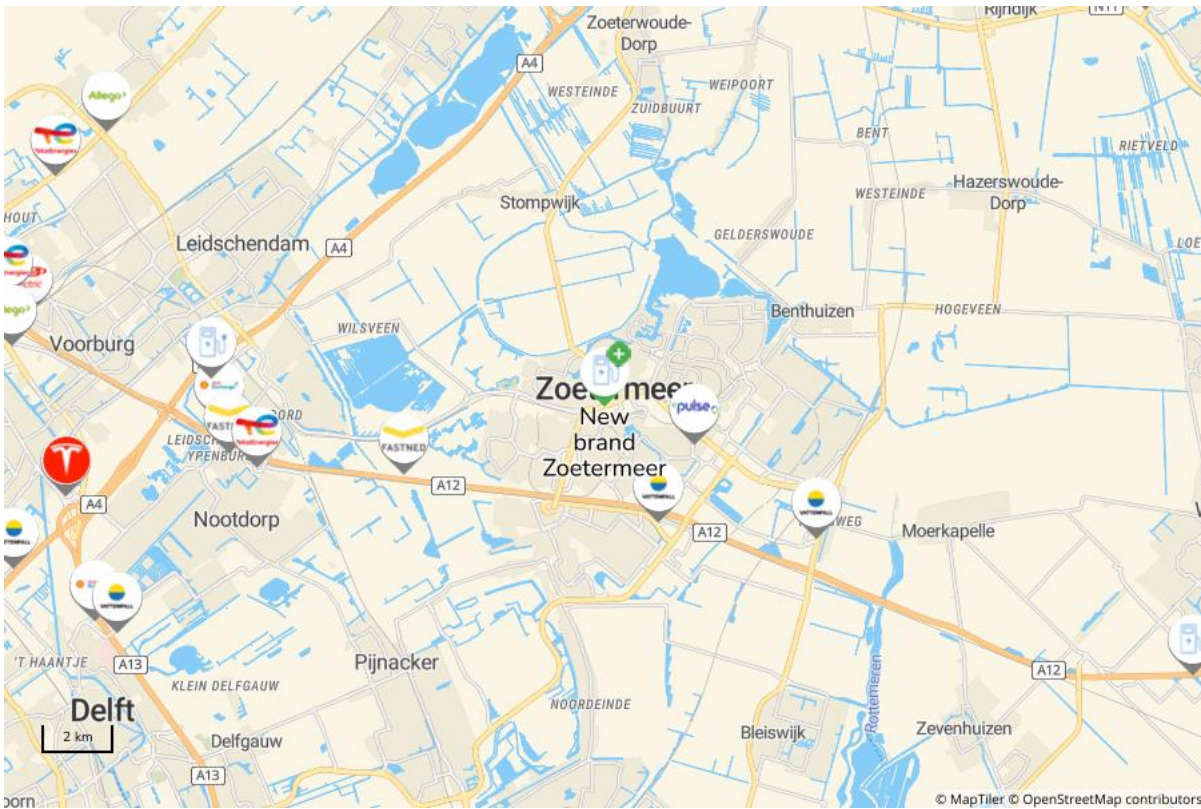
This result shows that the studied site is classed within the 8 % best sites of the country in terms of potential.

Potential (kWh/ ultrafast charging point) vs. other stations



The opening of this new location will partially cannibalize surrounding charging locations. In this table you can find an overview of the most cannibalized locations.

Name of the concurrent station	Address	# Ultrafast charging points (>150kW)	Ultrafast power (kW)	# Fast charging points (49-150kW)	Fast power (kW)	Price (€/kWh)	Drivetime (min)
bp pulse Zoetermeer	Van Aalstlaan 380	2	150 kW	0	N/A	0,60 €/kWh	7
Fastned Zoetermeer	Knorrestein A12	8	225 kW	3	50 kW	0,57 €/kWh	8
Vattenfall InCharge Lansingerland	Jadestraat 10	0	N/A	2	50 kW	0,54 €/kWh	10



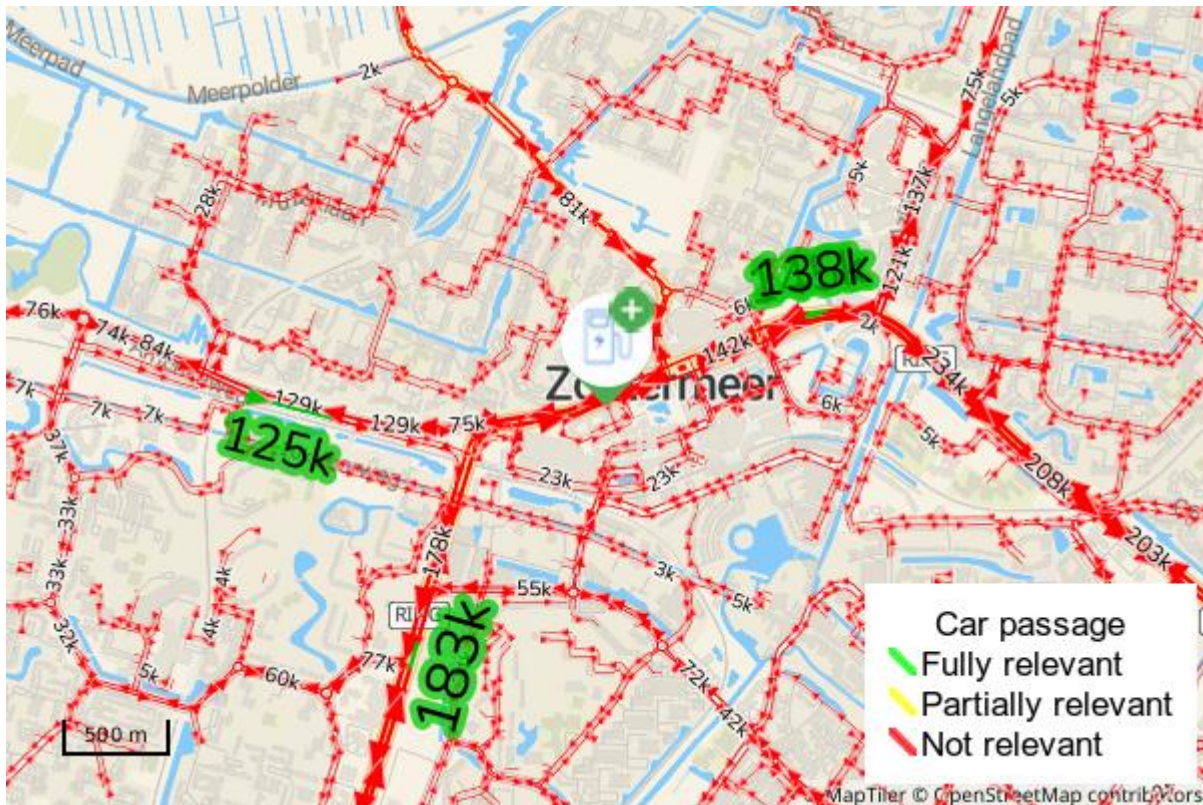


The calculation of the potential is based on the following indicators (ranked in function of importance) :

2.1. On the road potential within 3 minutes

This potential consists of the car passage (expressed in the average number of vehicles passing by per week). This potential is very important for ultrafast charging points.

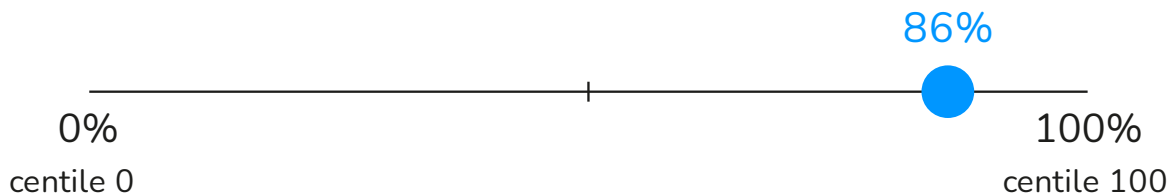
On this map, passage of each road segment is visualized. This gives an indication of the market potential related to passage in the proximity of the charging location.



The charging location has an estimation of **590.412** cars passing by per week. This is based on the 4 incoming roads with the highest passage score at 3 minutes drivetime.

With this result, the site is classed within the 14 % best sites in the country.

Cars passing by per week compared to other stations



2.2. Potential of local activity in a 300m radius

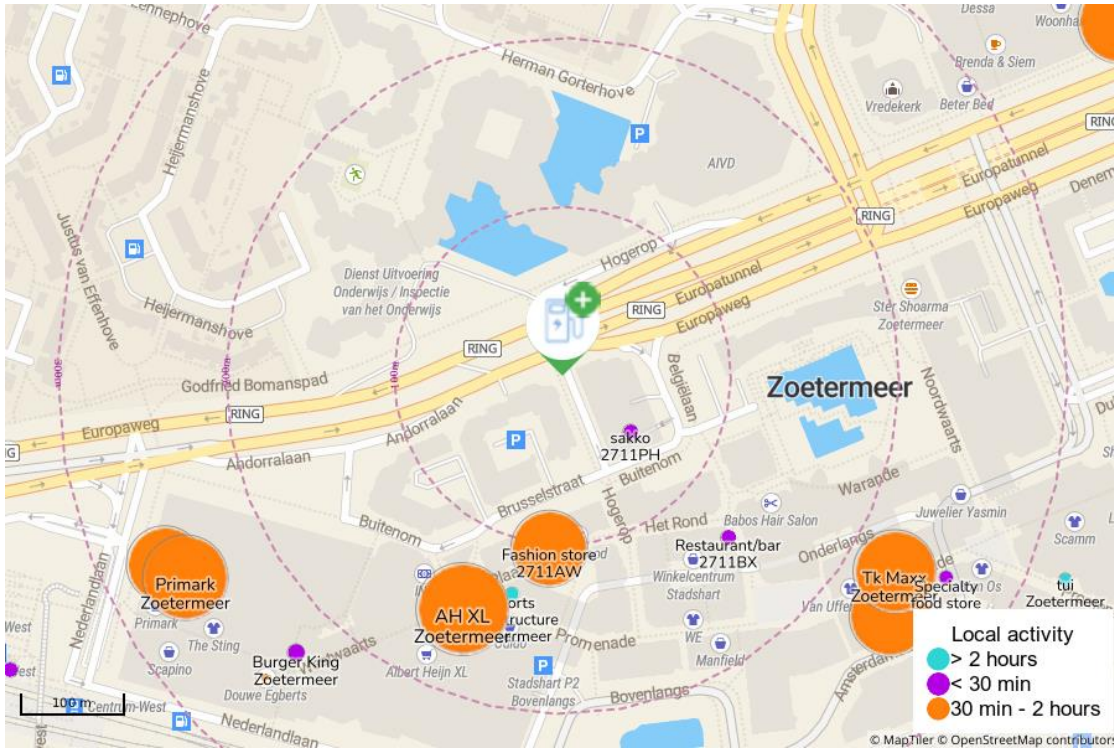
The presence of relevant local activity is important for ultrafast charging points. Mainly activity with a short visit duration (<30min) is important. Also activity with a medium long duration (30min – 2h) is partly relevant. In this study we took into account the following activity:

< **30min** : fast food restaurants, shops, destination retail...

30min - 2h : non-destination retail, restaurants, bars, cinemas, sport & cultural spaces.

> **2h** : work, schools, touristic places, hotels.

The figure below shows the local environment and the presence of perfect neighbours surrounding the charging location.

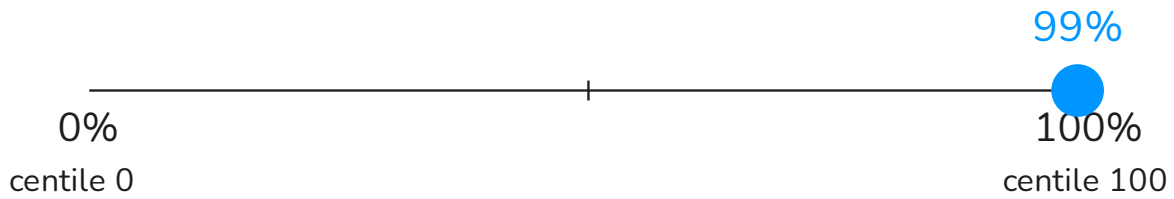


Less than 30min	Address	Number of visitors per year	Distance (m)
Sakko	Belgiëlaan 2	25.000	52 m
McDonald's Zoetermeer Promenade	Promenade 30	50.000	140 m
Specialty food store Zoetermeer	Westwaarts 41F	10.000	151 m
Restaurant/bar 2711AR	Promenade 40A	20.000	154 m
Dunkin' Zoetermeer	Westwaarts 22	20.000	201 m
Burger King Zoetermeer	Burg. Van Leeuwenpassage 34	50.000	228 m

In this overview, we compare this result with those observed at other sites in the country.

With this result, the site is classed in the 1 % best sites of the country in terms of local activity potential with a short visit duration (<30min) in a 300m radius.

Local activity potential less than 30min in a 300m radius



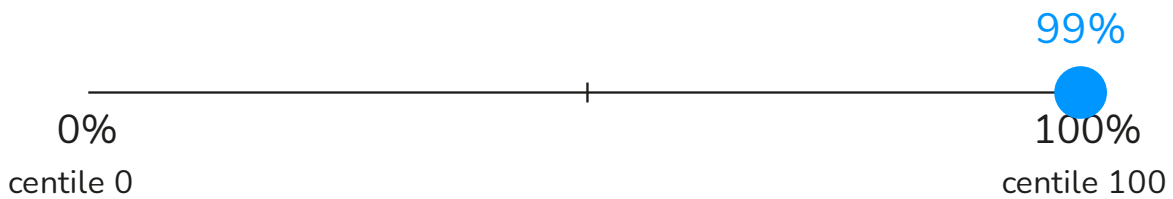
30min - 2h	Address	Number of visitors per year	Distance (m)
Fashion store 2711AW	Plaats 15	25.000	102 m
Wibra Zoetermeer Het Rond	Het Rond 26-28	22.000	115 m
AH XL Zoetermeer	Westwaarts 41	350.000	150 m
Fashion store Zoetermeer	Promenade 40B	25.000	153 m
C&A Zoetermeer	Promenadeplein 108	75.000	170 m
Hema Zoetermeer Promenadeplein	Promenadeplein 101	50.000	200 m
Media Markt Zoetermeer	Burgemeester Van Leeuwenpassage 30	75.000	205 m
Tk Maxx Zoetermeer	Promenade 154-156	100.000	229 m

In this overview, we compare this result with those observed at other sites in the country.

With this result, the site is classed in the 1 % best sites of the country in terms of local activity potential with a medium long duration (30min-2h) in a 300m radius.



Local activity potential for visit in 30min-2h in a 300m radius

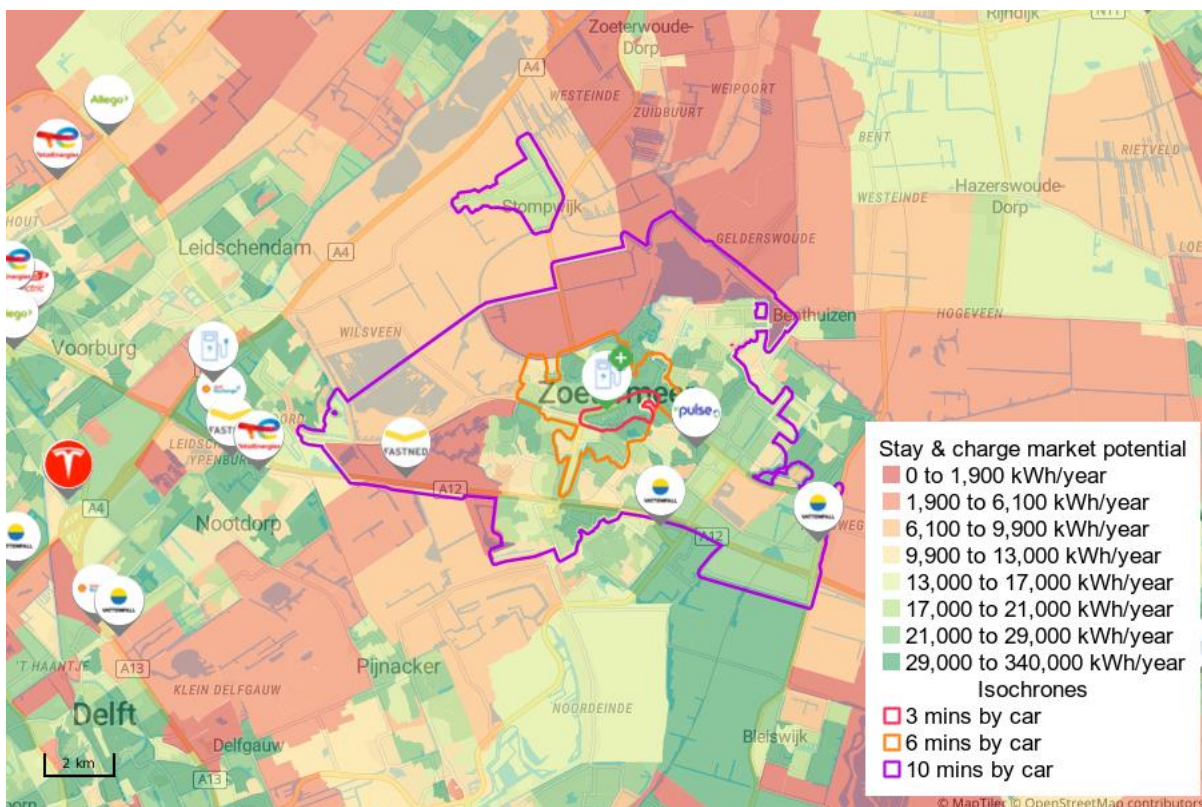


2.3. Residential and local visitor's potential

This is the destination potential that is part of the potential of consumption of residents that charge their vehicles close to their homes, their work and their activities. This is a less important potential for ultrafast charging points.

To calculate the potential per zone, we take into account the number of electrical vehicles, the wealth index, the estimated workers and the commercial activity (number of visits/year) for every zone.

On this map, you can see the potential residential and activity per zone around the charging location.



The table below shows an overview of the potential indicators, within each environment of the site :

Environment analysis	0~3 min by car	0~6 min by car	0~10 min by car
Market potential 'stay & charge'			
Inhabitants	2.467 inhabitants	22.635 inhabitants	91.121 inhabitants
Households	1.543 families	11.379 families	42.746 families
Wealth index	106 %	96 %	98 %
Population density	9.036	7.576	6.703
Cars	1.302 cars	10.688 cars	44.382 cars
Light commercial vehicles	146 vehicles	1.202 vehicles	4.993 vehicles
Electric vehicles	77 vehicles	623 vehicles	2.598 vehicles
Employees	4.917 FTE	11.578 FTE	39.070 FTE
Number of visits > 2 hours in the zone	14.000 visits	114.000 visits	1.171.900 visits
Residential potential	265 kWh/year	2.034 kWh/year	8.377 kWh/year
Market space 'stay & charge'			
Stay & charge market potential	79.915 kWh/year	439.406 kWh/year	1.684.945 kWh/year

2.4. Location quality

Visibility, accessibility & price have a significant impact on the success of a charging location.

2.4.1. Visibility : Normal

Each location in the platform can get a visibility score going from very bad to very good. This is not an automatically calculated parameter, but a manual scoring. By default, for all competitors and tested locations, the value is set to neutral unless you explicitly change it. It's useful to fill out this parameter when you are testing a specific case :

Visibility	Definition
Very good	Your location stands out & gets noticed by everyone
Good	Some positive elements, but not the best
Normal	Both positive as negative aspects, location doesn't stand out
Bad	Large part of passing traffic doesn't notice your location
Very bad	Almost nobody notices your location

For this location, the estimation of the visibility is actually set on : "Normal".

2.4.2. Micro-Accessibility : No issues

Each location in the platform can get a micro-accessibility score going from no issues to major issues. This is not an automatically calculated parameter, but a manual scoring. By default for all competitors and tested locations, the value is set to no issues unless you explicitly change it. It's useful to fill out this parameter when you are testing a specific case :

Micro-accessibility	Definition
No issues	Able to smoothly access the location site
Minor issues	Lose time to access the location site
Major issues	Lose lots of time to access the location site

For this location, the estimation of the micro-accessibility is actually set on : "No issues".

2.4.3. Recharge price : 0,58 €/kWh

Each location present in the platform has a charging price. Which is the average price relating to the station excluding taxes and any additional parking costs (€/connected hour). The indicated price also doesn't take into account flat-rate prices (fixed price per charging session) or the price of time spent (cost per connected hour).

For this location, the ad hoc price is actually set on : 0,58 €/kWh



3. Electrical grid information

The high tension network is located at 56 m from the location.



— Electrical network

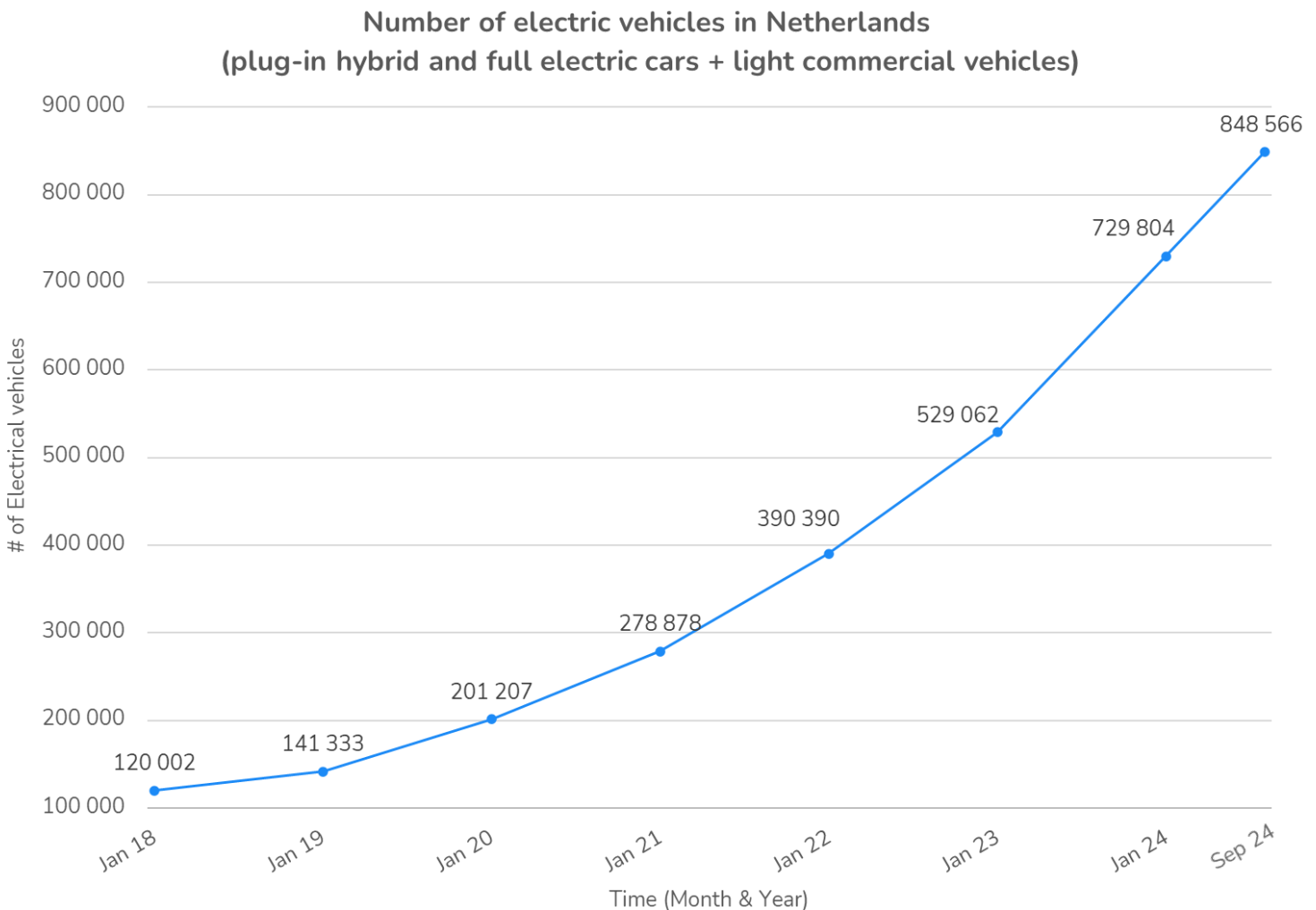
4. Interpretation of the results and market tendencies

This report of the investigation of potential is based on the most recent market data.

In this section, we give a brief overview of the different data sources used and the observed evolutions in the charging electrical vehicles market.

4.1. Number of electric vehicles in the country

The number of electrical vehicles in Netherlands is fixed to 848 566 in ChargePlanner. This corresponds to an estimation of reality at the start of September 2024 and contains the cars as well as the light commercial vehicles. Of these, 59% (502 057) are fully electric vehicles, while 41% (315 996) are plug-in hybrid electric vehicles. Since January 2024, the number of electrical vehicles rose by 16%, which means that the strong growth of the last years continues.



4.2. Competitive pressure of fast and ultra-fast charging points

In Netherlands, there are 1 204 sites with at least one fast or ultrafast charging point.

Brand	September 2024								
	Number of locations (at least 1 F or UF)	Ultrafast		Fast		Slow		Price of the kW (€)	
		# Charging points	Average power (kW)	# Charging points	Average power (kW)	# Charging points	Average power (kW)	(Ultra)fast	Slow
Fastned	175	962	300	390	50	36	40.5	0.57	0.08
Shell Recharge	127	410	175	184	70	131	30	0.64	0.13
E-Flux	124	236	270	135	75	129	22	0.61	0.13
Vattenfall InCharge	104	6	150	206	50	103	43	0.53	0.45
Allego	83	213	300	88	50	153	29	0.63	0.28
bp pulse	66	280	150	93	100	3	22	0.59	0.03
TotalEnergies	62	120	175	127	100	21	43	0.03	0.03
Tesla Supercharger	49	1200	250	4	72				
Lidl	38			76	50	38	22		
PowerGo	30	8	195	68	90	34	22		
AVIA	28	41	200	29	50	73	22	0.65	0.09
Eneco	28	34	150	33	50	325	22	0.51	0.32
Abel installatie	27			66	50	63	22		
Ecotap	24	4	165	44	55	75	22	0.58	0.23
Leap24	24	79	160	41	118				
Other brands	215	452	259	264	77	818	14	0.39	0.13
Total	1 204	4 045	181	1 848	69	2 002	24	0.36	0.12

5. About RetailSonar

From location planning to location performance. RetailSonar is **Europe's leading geomarketing company**. We optimize the location strategy for over 200 retailers in more than 15 countries.

We make the difference thanks to :



The most complete, innovative & up-to-date **retail database** in Europe



Accurate sales forecasts thanks to state of the art of **Artificial Intelligence**



An international **geomarketing platform** for real estate, sales & marketing

RetailSonar offers an unrivalled expertise in providing the right location strategy for all stakeholders in the fast changing EV sector.

The right location strategy for installers and distributors



- Determine the optimal locations for each type of charger
- Simulate business cases in your own data platform
- A professional market report to share with stakeholder

The right location strategy for retailers & real estate



- Determine the profitability of all your available locations
- Simulate business cases in your own data platform
- Clear guidelines to bring your strategy into practice

The right location strategy for retailers & real estate



The right location strategy for governments & cities

- Determine the optimal regional coverage of chargers
- Simulate business case & optimize your strategy
- Realize your policy goals