

Heavy Electric Traffic Ecosystem HETE



KEMPOWER

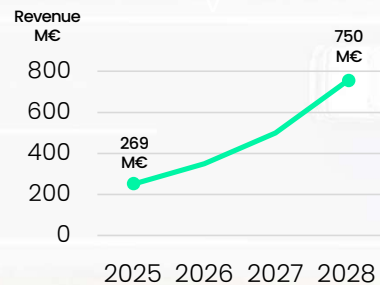




Kempower introduction



Growth trajectory



+800

Total headcount

+570

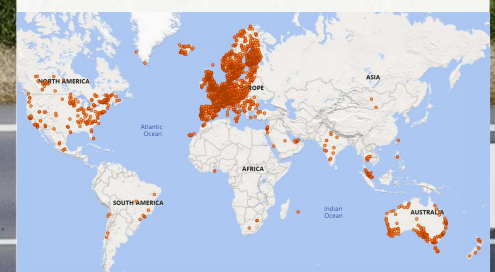
Employees in Finland

+185

R&D personnel in Finland



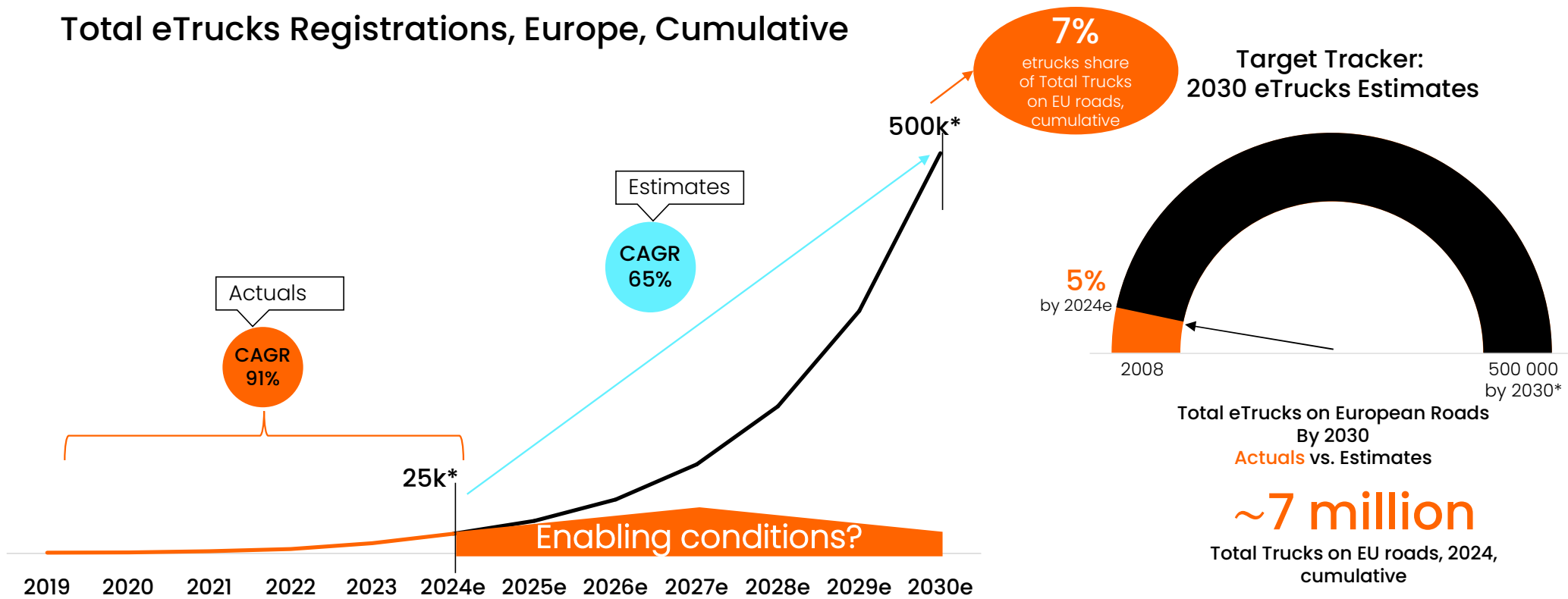
KONEGRANES PROLOGIS
Allego> STI VIKING LINE
VTT DP WORLD KALMAR
NESTE amazon SCANIA
DHL DAIMLER VOLVO
posti LUT University Tampere University



Global charger locations
▶ 30k chargers
▶ 95 % outside of Finland

By 2030, we estimate there will be 500,000 eTrucks on the European roads

Total eTrucks Registrations, Europe, Cumulative



Source: European Alternative Fuel Observatory (EAFO); Kempower Market Research (KMR)

*KMR Estimates



What are **Enabling Conditions**?

1

eTrucks Charging Infrastructure

New AFIR regulation on DC charging points on Europe's TEN-T Core and comprehensive road networks

2

More Favourable Policies

Purchase incentives, tax schemes, carbon pricing measures, etc.,

3

TCO* on par with fossil fuel Trucks

To make a viable business case for transport operators

4

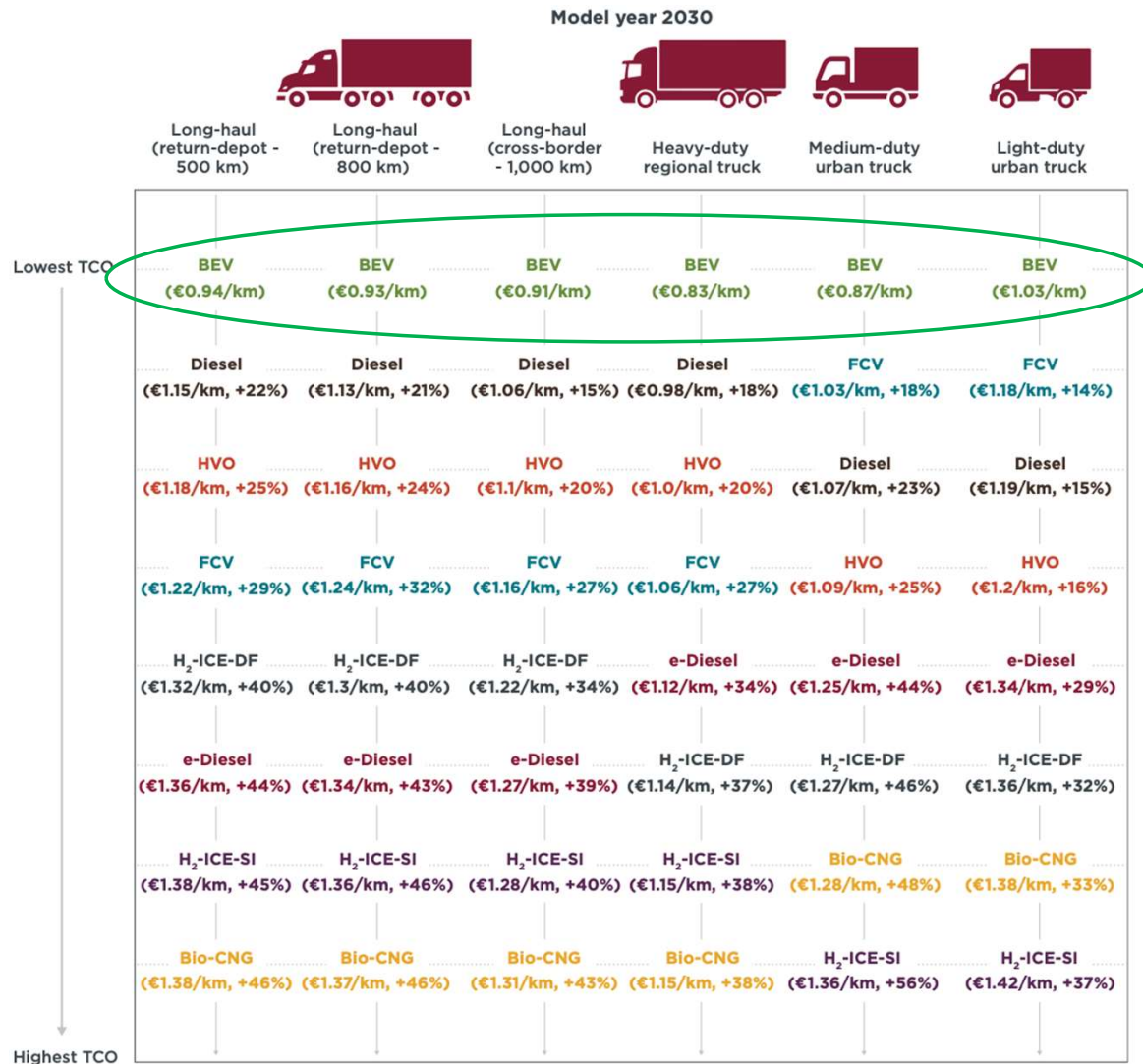
Enough Green Energy to charge

Otherwise, we are not decarbonising

*TCO – Total Cost of Ownership

Source: Kempower Market Research (KMR)

3 Total Cost of Ownership (TCO)



2030: Across all truck classes, **Battery Electric** powertrains recorded the **lowest TCO**

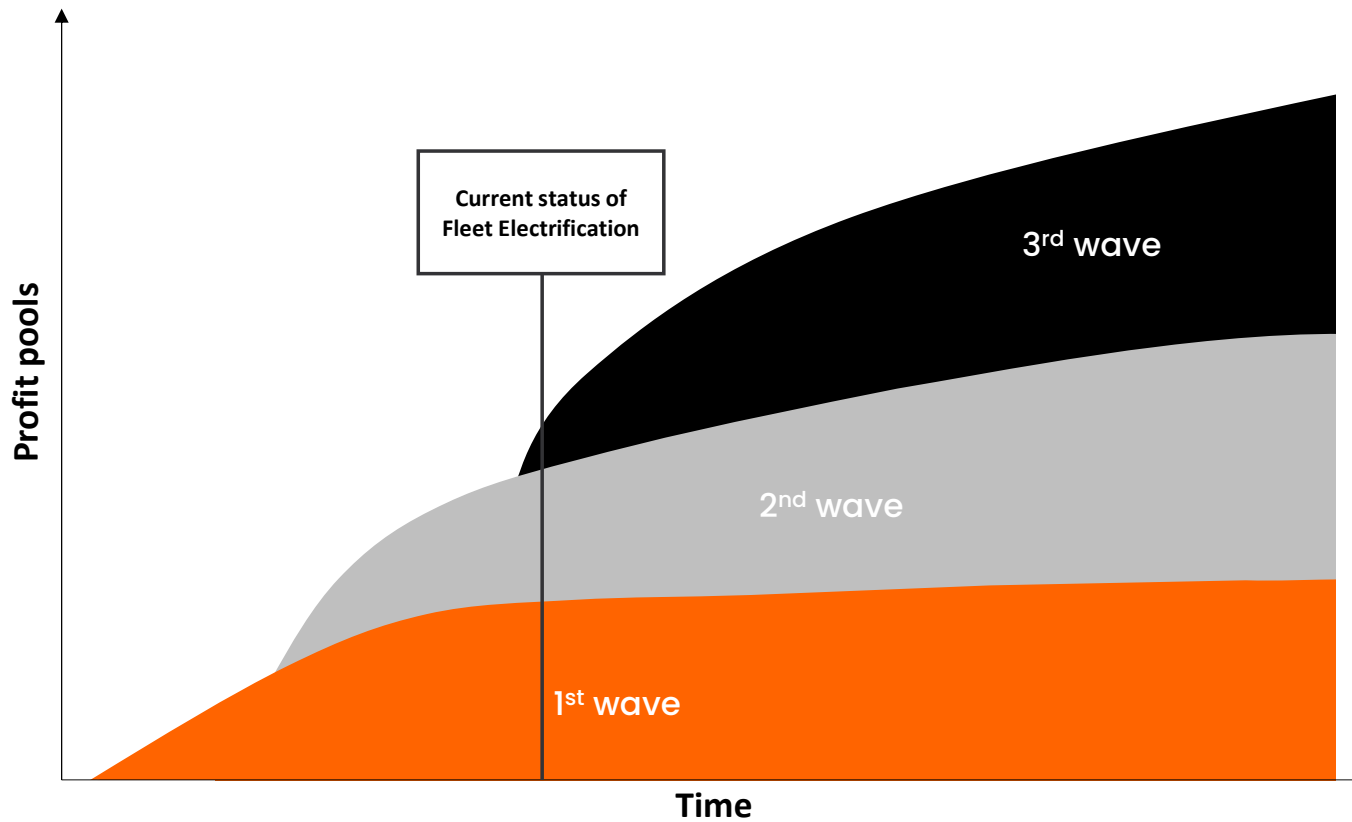
Conventional trucks powered by fossil diesel are expected to be more expensive to own and operate than battery electric trucks by **15% to 25%**

Hydrogen combustion powertrains and conventional trucks powered by Bio-Compressed Natural Gas (Bio-CNG) and e-diesel (synthetic diesel) record the highest TCO, at **30% to 45%** higher than that of battery electric trucks.

Source: International Council of Clean Transportation - ICCT - [Working Paper 2023-28](#)



The winners in EV Charging will provide a seamless customer experience across hardware, software and energy management



The end-game is Energy

- Fleet electrifications represents an enormous energy demand, driving revenue stacking opportunities
- Integration with local generation, storage, EV Charging enables revenue opportunities for Fleet operators
- Grid limitations are a critical bottleneck for EV Charging infrastructure, driving the need for Energy optimisation

Software as the Brains

- Software optimises EV Charging at the intersection of complex energy, payment, OEM and infrastructure markets,
- Critical long term growth segments in EV Charging that drive uptime, reliability, operational efficiencies
- High impact on TCO as software drives down complexity and serves as the Brains of EV Charging

The Hardware foundation

- Hardware forms the foundation of EV Charging infrastructure across Public, Destination, Depot and Public Overnight Charging
- Commercial vehicle charging dominated by DC and MCS charging offering
- Kempower is an EV Charging Pioneer with state-of-the-art DC Charging solution portfolio



Kempower HETE 2024-2028

Kempower HETE was chosen as a Veturi project for a 5-year period starting in March 2024.

HETE's objective is to electrify heavy traffic sustainably and aim for a business volume of over €1 billion for the ecosystem companies.

Business Finland provides:

- €10 million in funding for Kempower

- €20 million in funding for HETE ecosystem partners

- 60-75 M€ total investments for accelerating the electrification of heavy traffic

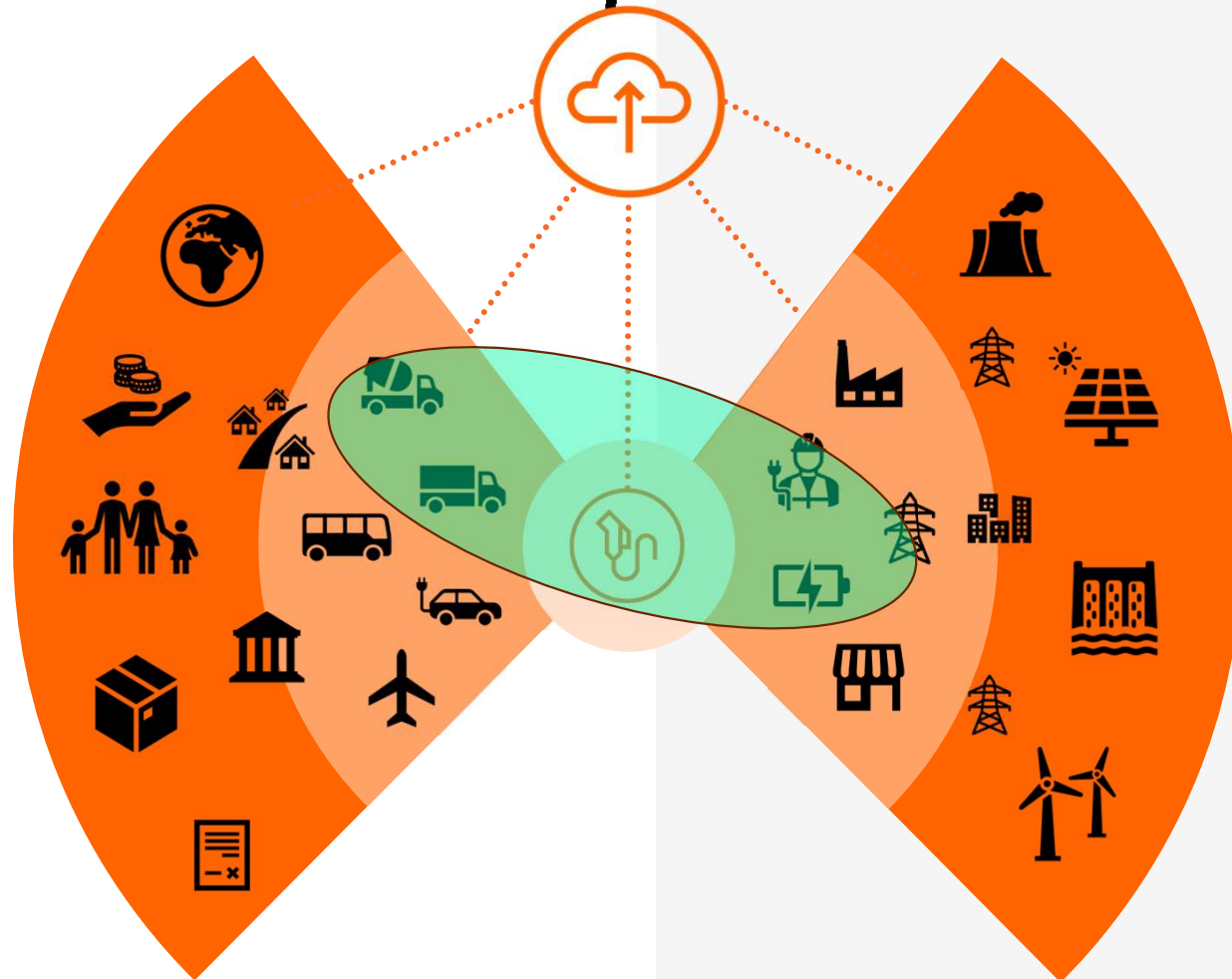
Scania Trucks at Alfredsson Transport Truck depot, Sweden, on August 27th, 2025

Peak combined charging power of 864 kW with one MCS and one CCS satellite

[Link to the news](#)



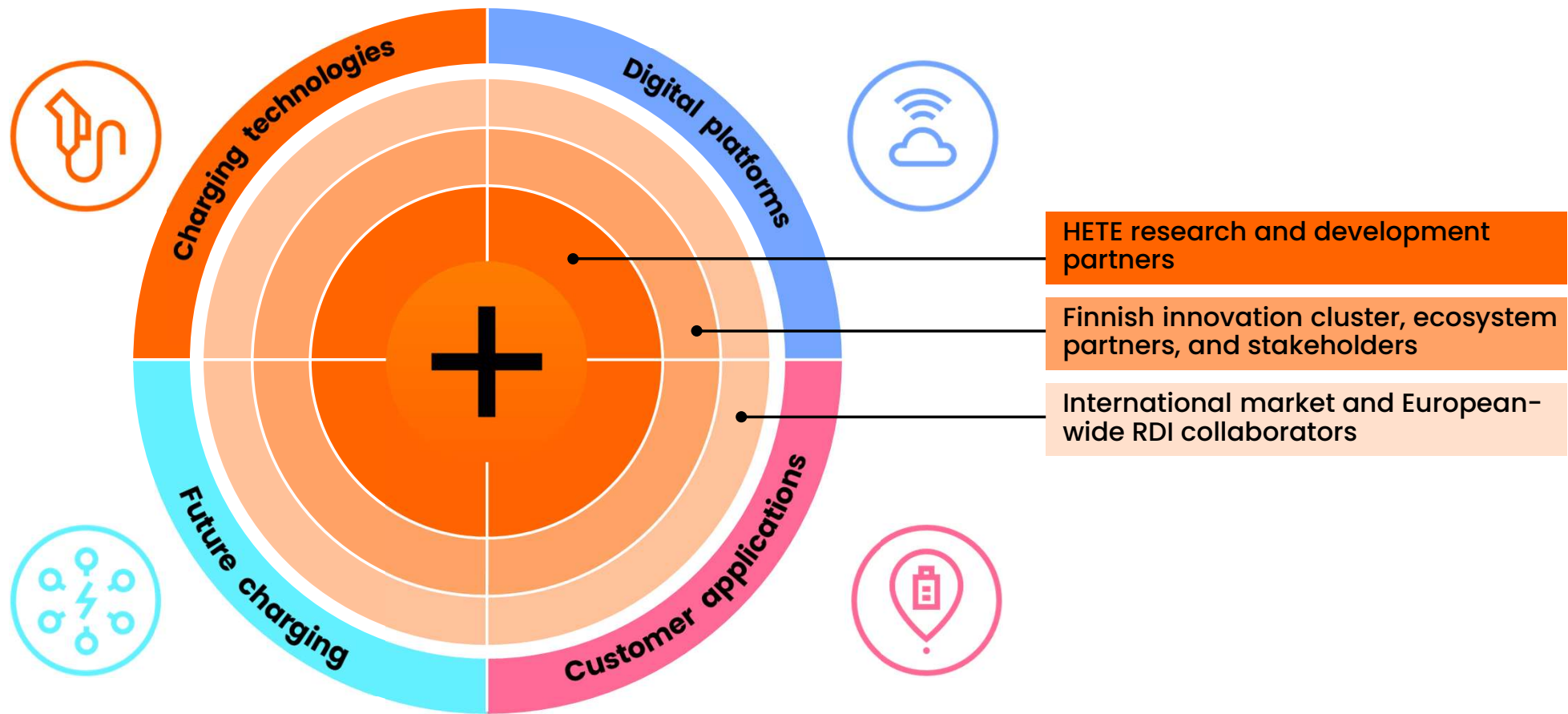
The HETE Scope

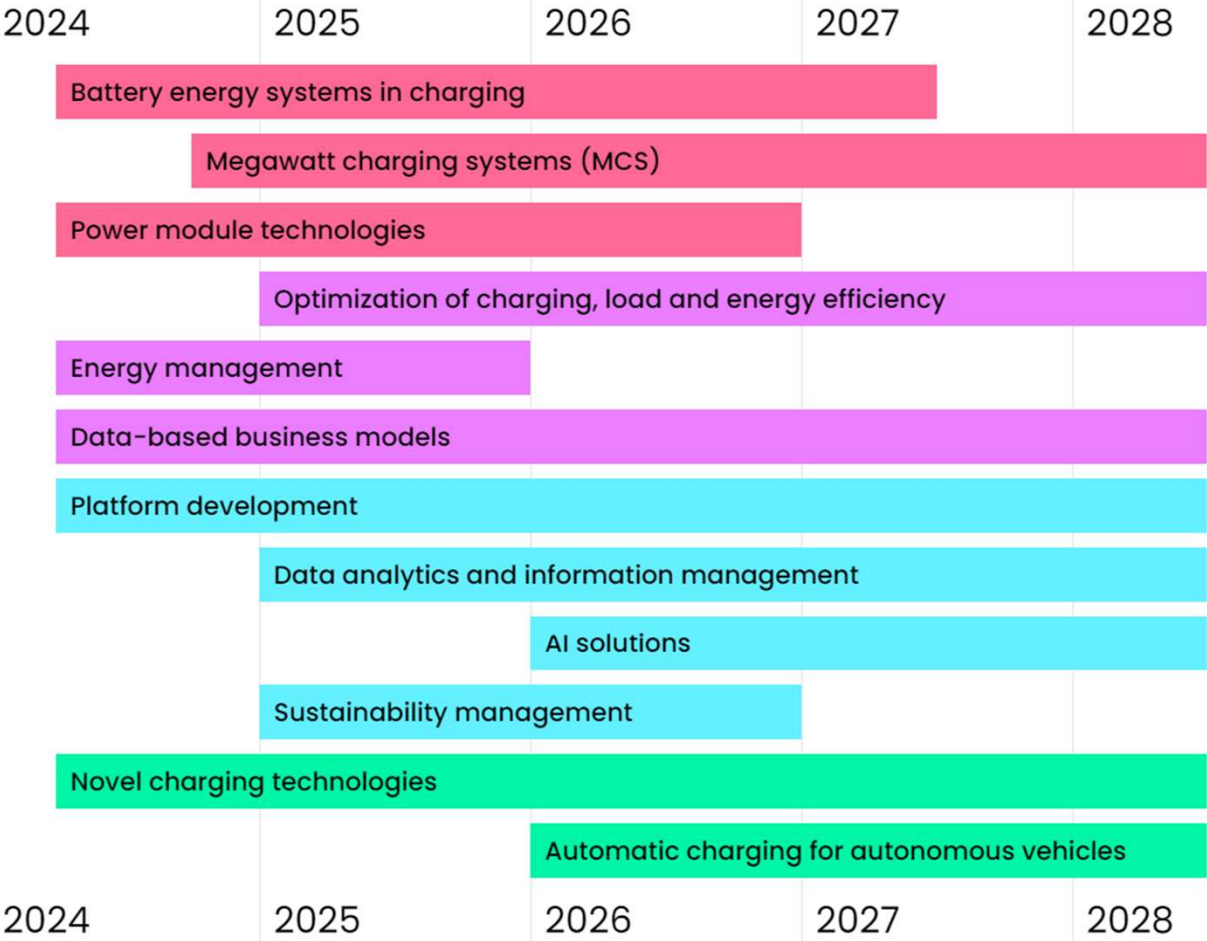
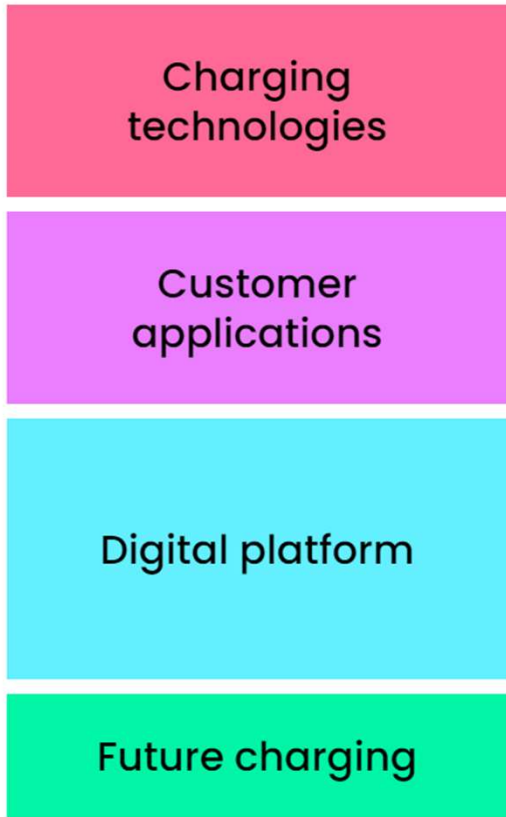


The goal of the Heavy(duty) Electric Traffic Ecosystem program, later HETE, is to develop charging technology suitable for truck traffic and the software platform that supports it, to develop a testing platform for charging infrastructure, and to study future charging models and the effects of charging infrastructure on electric grids



The HETE ecosystem layers







Empowering heavy electric traffic

The HETE Veturi vision

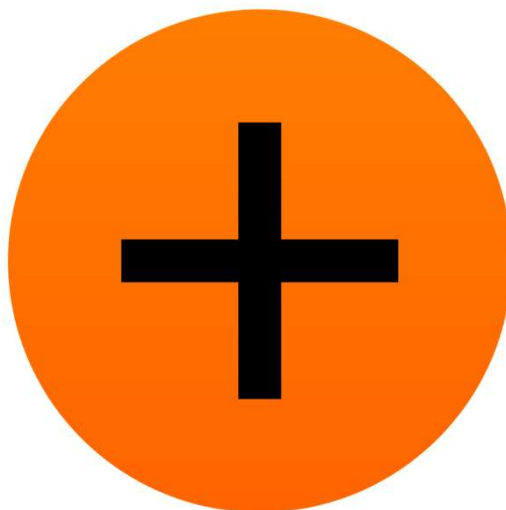
Enabling the ecosystem to research and develop new technologies and business models related to energy flow and logistics in the electrification of the heavy traffic industry.

HETE aims to build a leading global ecosystem by 2030

- >200 partners involved in the ecosystem
- €1 bn+ in revenues from heavy electric traffic ecosystem companies
- Global leadership in innovations in this field



Electrify heavy traffic with us!



Further information:

Tommi Rissanen, D.Sc (Econ.)

Ecosystem Lead, HETE Program

Mobile +358 44 420 1843

tommi.rissanen@kempower.com

<https://hete.Kempower.com>