WHO WE ARE

PROFILE

Overview

Q-Park is a leading parking infrastructure owner and operator in the Western European market, with a large and diversified portfolio of owned, leased and managed parking facilities (PFs) across seven Western European countries. We mainly operate purpose-built off-street parking spaces (PSs), owned by us as well as PSs under concessions and long-term leases from public and private landlords, at strategic locations.

We started our operations in the Netherlands in 1998, and expanded to Belgium, Germany and the United Kingdom in the early 2000s. We have consistently secured long-term contracts and built a portfolio of prime parking locations in seven Western European countries and over 500 cities (including control fee contracts we are present in over 700 cities). Our diversified portfolio includes multifunctional PFs near inner-city areas, public transport nodes, airports and hospitals.

As at 31 December 2025, we operate over 5,500 PFs providing over 1,200,000 PSs in the Netherlands, Germany, France, Belgium, the United Kingdom, Ireland and Denmark.

Besides operating off-street parking facilities we also offer:

- Off-street parking management
- On-street parking and kerbside management
- EV charging points
- Parking as a Smart Service (PaSS) platform
  - an industry leading seamless parking service; and
  - a fully integrated cloud-based digital infrastructure.

Market position

Based on publicly available industry data of our competitors, we estimate that we are a top three player in terms of estimated off-street revenues in all the countries in which we operate.

TRENDS & STRENGTHS

We distinguish ourselves from competition with our quality portfolio of predominantly owned and long-leased off-street parking facilities in prime western European city centre locations, with our local market leadership positions, with our proprietary digital platform PaSS (Parking as a Smart Service), with our value-added EV charging propositions, with the longevity of our cash flow and a scalable parking-infrastructure platform which has tangible growth opportunities across our core parking business.

Together with key parking and digital infrastructure features underpinning our business model and the continuing regulatory shift in favour of off-street parking, our business benefits from a high level of stable and recurring cash flows.

Trends

We expect to benefit from the following key trends:

- urbanisation - growing urban congestion driving the shift from on-street to off-street parking
- mobility mix - personal car ownership and private journeys continue to grow
- city as an experience - inner-city off-street parking ideally suited for longer stays
- liveability - shifting parking from on-street to off-street
- growth of paid parking - parking operators are important partners in creating accessible city centres
- digitalisation - off-street parking can offer smart digital solutions which customers want such as pre-booking
- energy transition - off-street parking facilities are ideally suited to offer EV charging and energy management at scale

Strengths

We are well positioned to take advantage of these trends given our:

- continued focus on off-street parking.
- strategically located parking assets to capture continued demand
- highly-developed and mature PaSS platform enabling a digital mobility ecosystem and seamless customer services
- EV charging programme which substantially increases the number of EV charging points in our owned and long-leased parking facilities