

INVESTOR BRIEFING | EV FLEET INFRASTRUCTURE REAL ESTATE

The Next Real Estate Boom May Be Electric

How robotaxis, autonomous fleets, electric trucks, and high-utilization EVs could reshape industrial yards, commercial parcels, fleet depots, and charging-oriented real estate.

Prepared for real estate investors

Industrial + commercial property strategy

2026 market perspective

Executive Summary

The electric vehicle revolution is moving beyond individual car ownership. The next phase is increasingly fleet-based: robotaxis, autonomous shuttles, electric delivery vans, municipal vehicles, service fleets, rental fleets, yard tractors, and medium- and heavy-duty electric trucks.

That shift creates a new real estate category: **EV fleet infrastructure real estate**. These sites are not simply parking lots with chargers. They are operating bases where vehicles charge, stage, clean, receive inspection, undergo light maintenance, connect to fleet software, and return to service.

The investor opportunity is to control the land, zoning, power capacity, and operating flexibility that future mobility fleets will need every day.

5M+

Public chargers globally, more than double the 2022 count, according to IEA's 2025 EV outlook.

24/7

Fleet sites may require round-the-clock charging, cleaning, staging, and dispatch operations.

Power

Electrical service, transformer access, and utility timelines can be as important as traffic counts.

Depots

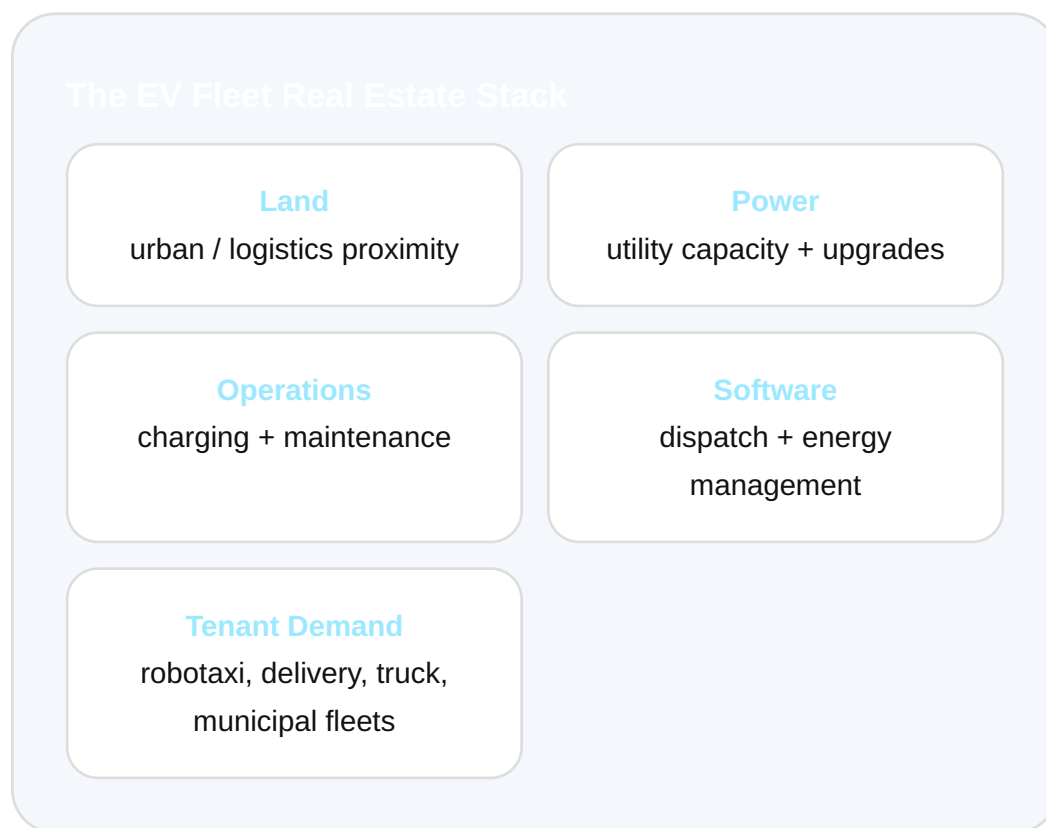
High-utilization EVs typically need controlled base facilities, not just public chargers.

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1. Why This Matters Now

Early EV infrastructure discussion focused heavily on public passenger charging. Fleet electrification is different. Fleet vehicles are economic assets. They drive predictable routes, consume large amounts of energy, and lose money when they are idle. For these operators, charging is not an amenity. It is part of the operating system.

Robotaxis make the real estate requirement more visible. Autonomous fleets need charging, staging, remote support, cleaning, sensor inspection, maintenance, and dispatch. Recent reporting and company announcements show autonomous fleets continuing to expand into more U.S. markets, while newer vehicles are being designed for broader operating environments and scale.



The best opportunities may appear first in ordinary-looking sites: older industrial yards, obsolete retail parcels, service facilities, truck terminals, underused parking fields, airport-adjacent parcels, and commercial properties near dense transportation demand.

2. Property Types Most Likely to Benefit



URBAN FLEETS

Robotaxi + Ride-Hailing Depots

Sites near downtowns, airports, hotels, hospitals, entertainment districts, and dense ride demand. These facilities may require secure vehicle storage, charging, cleaning, and dispatch lanes.



LOGISTICS

Last-Mile EV Delivery Yards

Small warehouses and van yards that can support route-based charging, parking, loading, driver support, and overnight energy management.



FREIGHT

Electric Truck Charging Nodes

Highway, port, warehouse, and industrial-corridor parcels that can accommodate wide turns, heavy pavement, high power, and driver amenities.



SERVICE

Autonomous Service Centers

Light industrial buildings with service bays for sensor cleaning, calibration, tires, brakes, inspections, software support, and fleet readiness work.



TRAVEL NODES



OPTIONALITY

Airport + Hotel Mobility Hubs

Properties near airports, cruise ports, resorts, convention centers, and hospitality corridors where demand is concentrated and recurring.

Commercial Repositioning Sites

Obsolete retail, large paved parcels, former service centers, and underused commercial locations may be repositioned if zoning, access, and power align.

3. Power Capacity May Become the New Location Advantage

In conventional real estate, investors focus on demographics, access, visibility, traffic counts, cap rates, and replacement cost. In EV fleet infrastructure real estate, a new question becomes central:

How many revenue-producing vehicles can this property energize, stage, service, and return to operation each day?

Power-ready sites may command a premium because grid interconnection, transformers, switchgear, trenching, utility approvals, and construction sequencing can become long-lead-time constraints. A property with ordinary buildings but strong power access may be more valuable for fleet infrastructure than a superior-looking site with limited electrical capacity.

- Existing electrical service size
- Distance to substations
- Utility upgrade cost and timing
- Time-of-use power rates
- Demand charges
- Room for transformers and switchgear
- Battery storage potential
- Solar canopy potential
- Backup generation or resiliency options
- Fire access and equipment protection

4. Business Models for Real Estate Owners



Long-Term Fleet Lease

A landlord leases a yard, building, or ground site to a fleet operator, charging developer, logistics company, or autonomous mobility company.



Build-to-Suit Depot

A developer delivers a purpose-built facility with charging lanes, maintenance bays, offices, secured access, and utility infrastructure.



Charging-as-a-Service Partnership

The property owner partners with a charging operator to monetize electricity access, parking, and fleet throughput.



Multi-Tenant Mobility Yard

A shared facility serves delivery fleets, service vans, ride-hailing vehicles, municipal users, and small logistics operators.



Public-Private Infrastructure Site

Municipal, airport, port, transit, or utility partners use private land to accelerate fleet electrification.

5. Investor Property Screening Checklist

Location Demand

Near airports, ports, downtowns, medical districts, universities, hotels, warehouses, senior communities, or logistics corridors.

Zoning Flexibility

Allows vehicle storage, fleet operations, charging, service bays, outdoor use, lighting, and 24-hour activity.

Power Potential

Existing service, substation proximity, transformer space, utility timeline, and energy cost profile are favorable.

Vehicle Circulation

Safe ingress/egress, adequate turning radius, queueing, charger layout, and low conflict with neighboring uses.

Site Security

Fencing, lighting, cameras, access control, and ability to protect chargers and fleet assets.

Expansion Optionality

Room for additional chargers, battery storage, solar canopies, maintenance capacity, or tenant growth.

Permitting Path

Clear local process for electrical work, stormwater, fire review, traffic, signage, and environmental review.

Exit Value

Potential to become mission-critical infrastructure with durable lease demand and institutional buyer appeal.

6. Risks and Cautions

Technology Risk

Autonomous adoption may scale slower than expected. Some operators may consolidate, change strategy, or fail.

Utility Risk

Power upgrades can be costly, slow, and uncertain. A strong location can become uneconomic if energy capacity cannot be delivered.

Regulatory Risk

Local rules may limit 24-hour operations, outdoor storage, truck traffic, lighting, charging equipment, or autonomous vehicle activity.

Tenant Credit Risk

Early-stage mobility companies may have ambitious growth plans but limited operating history. Credit underwriting matters.

Capital Cost Risk

Chargers, switchgear, trenching, transformers, paving, fire protection, and battery systems can exceed initial budgets.

Community Opposition

Neighbors may object to lights, noise, vehicle movement, service trucks, tow operations, security fencing, or late-night use.

Investor discipline: Do not buy every paved yard as an EV depot candidate. The best sites combine demand proximity, zoning compatibility, utility feasibility, operating design, and tenant economics.

Strategic Recommendations

1. **Inventory your portfolio** for yard space, industrial zoning, vehicle access, and electrical upgrade potential.
2. **Order preliminary power studies** before marketing properties as EV fleet sites.
3. **Map local demand drivers** including airports, hospitals, warehouses, ports, hotels, senior communities, and dense ride-hailing zones.
4. **Preserve optionality** by designing sites that can serve more than one tenant type or charging technology.
5. **Start entitlement work early** because utility coordination, fire review, stormwater, and traffic approvals can become bottlenecks.
6. **Market the property as infrastructure** by emphasizing power, uptime, fleet throughput, and mission-critical operations.

Selected Sources and Market Signals

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