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NORTH AMERICAN COUNCIL FOR FREIGHT EFFICIENCY

# REVISITING THE CASE FOR ELECTRIC TERMINAL TRACTORS:

# NEW DATA, REAL FLEET EXPERIENCES

October 7, 2026 • 2 pm ET

# Welcome to the Webinar

### Recording

This webinar is being recorded. A link to the video will be sent once it is available.

### Slide Deck

A copy of this slide deck will be available upon request.

### Questions?

Please use the Q&A section to send in your questions.

# AGENDA

- Welcome from Mike Roeth, NACFE
- Revisiting the Use Case for Electric Terminal Tractors with Bruce Stockton, NACFE
- Chris Bennett, Lazer Logistics
- Zack Ruderman, Orange EV
- Q&A

# Mike Roeth

NACFE

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## Mike Roeth

Executive Director

# North American Council for Freight Efficiency

- Unbiased, fuel agnostic, non-profit
- Mission to double freight efficiency
- All stakeholders
- Scale available technologies, guide emerging change and Run on Less demonstrations.

**www.NACFE.org**

**www.RunonLess.com**

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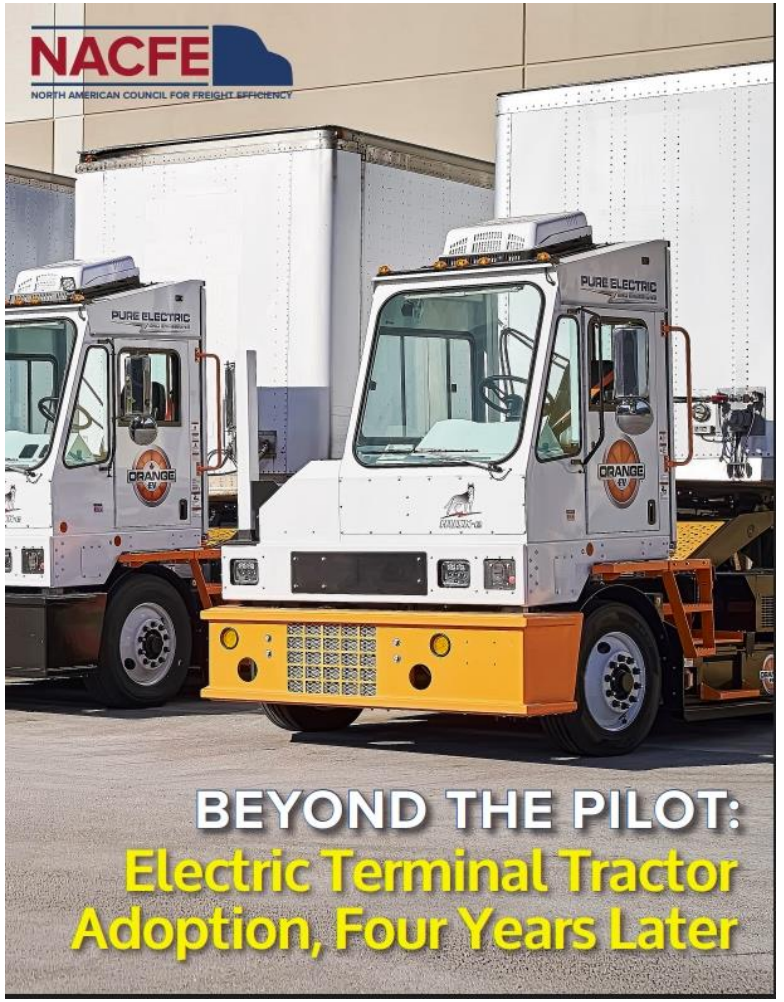
RUN ON LESS
MESSY MIDDLE

# Electric Terminal Tractor Report

- Collaboration Report Package includes:
  - Press Release
  - Full Report and Executive Summary
  - Website and Video
  - Infographic on Key Findings
  - Seven Case Studies
  - Readiness Tool
- Webinar on October 7th
- Funded in part by Orange EV

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# Bruce Stockton

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## Bruce Stockton

Senior Fleet Consultant

# Electric Terminal Tractor Report

- NACFE 2022 Run on Less – Electric Research and Report
- New 2026 Research
  - Desk Research, Survey and Interviews

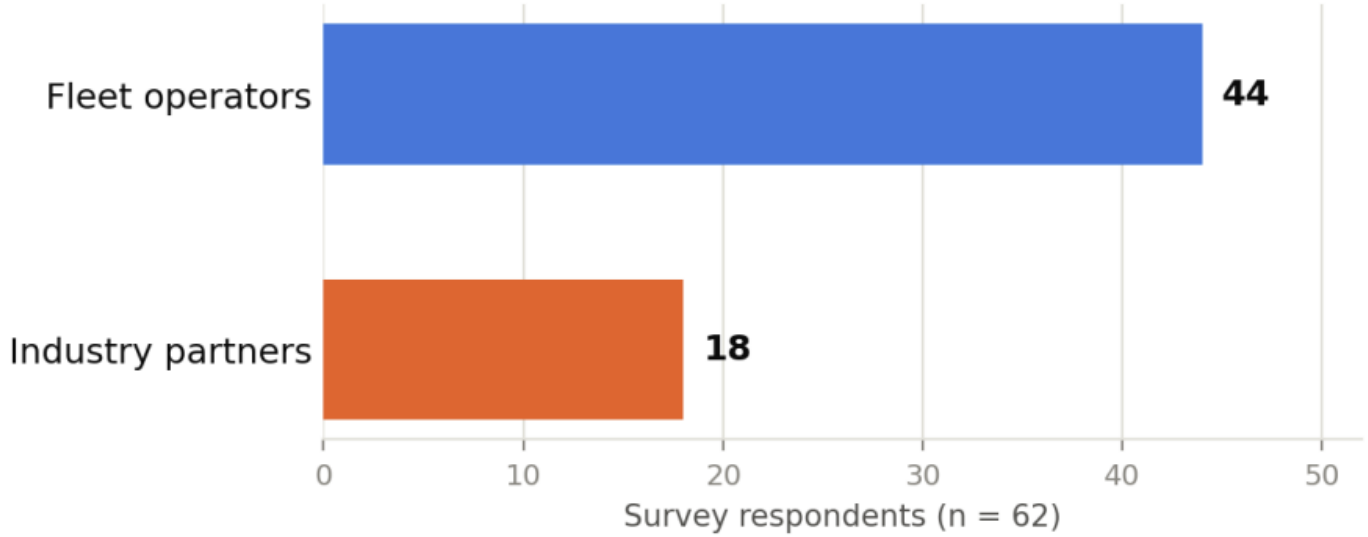


Figure 1: Survey respondents by type

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# The Market

## The Electric Terminal Tractor Market

| Topic | 2022 Report | 2026 Status |
|---|---|---|
| Market Size | Fewer than 500 electric terminal tractors estimated to be sold in the US and Canada in 2021 | More than 500 electric terminal tractors estimated sold in the US in 2025; Canada data unavailable. Actual adoption is likely higher, as CALSTART's data undercounts off-road deployments. |
| OEM Landscape | Electric terminal tractor market described as supported by four manufacturers (BYD, Kalmar, Lonestar SV, Orange EV) | Orange EV remains the market leader; Autocar, BYD, Kalmar Ottawa, Lonestar, Terberg, and TICO are deploying electric terminal tractors. |
| Electric Unit Price | $275,000 – $350,000 | Consistent: $250,000 – $350,000 reported directly by OEMs and fleets. |
| Diesel Unit Price | $100,000 – $125,000 | Consistent: $55,000 (used) – $150,000 (new) average reported active listings on TruckPaper. |
| Charging Strategy | Assumes a block of several hours to charge is the norm; sees opportunity charging as an emerging possibility used by early adopters | Fast opportunity charging during shift breaks is now common. A blend of opportunity and overnight charging is the favored approach by most fleets surveyed. |
| Diesel Aftertreatment (DPF/SCR) | "Likely" required | Maintains high-pressure seal between head and block |

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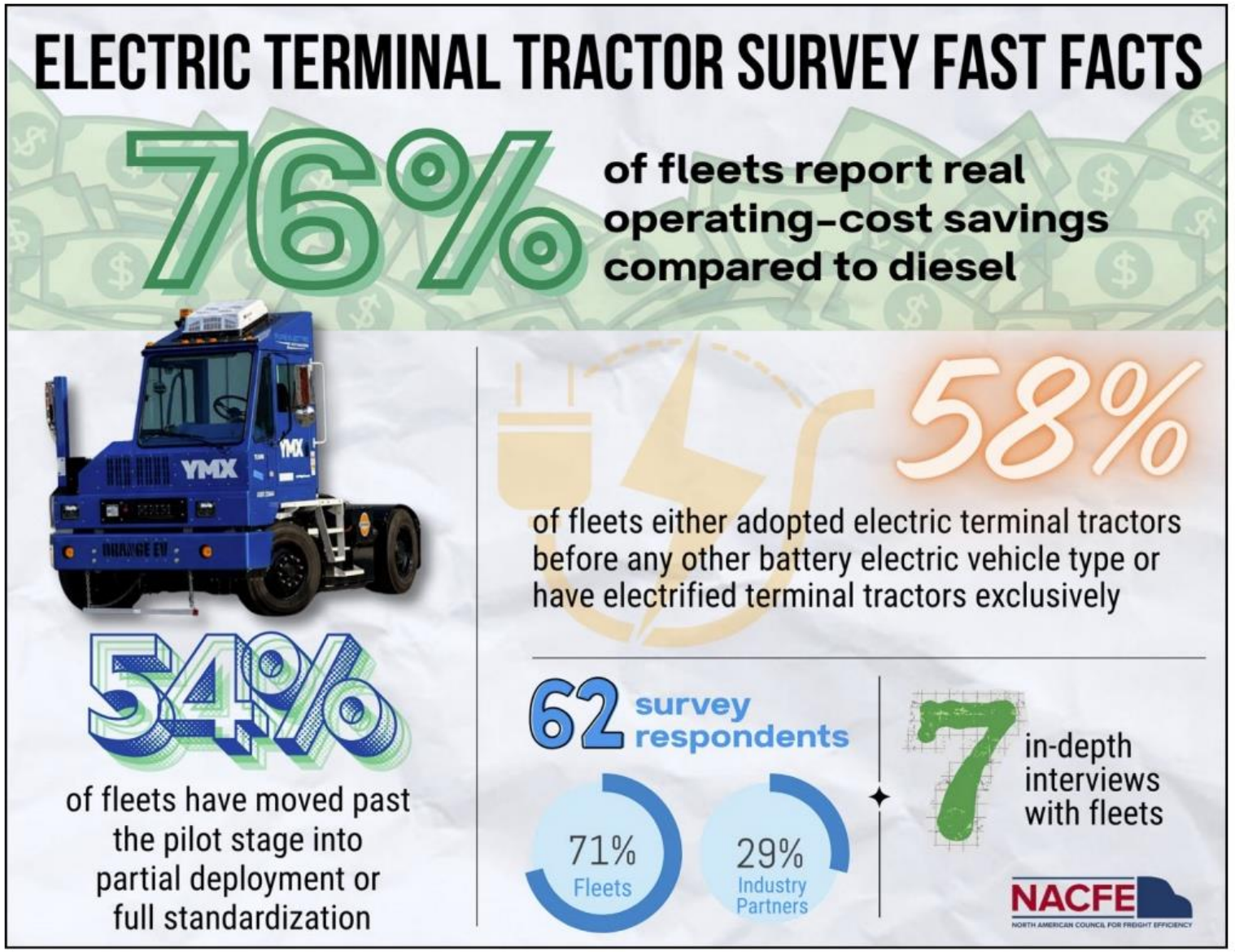
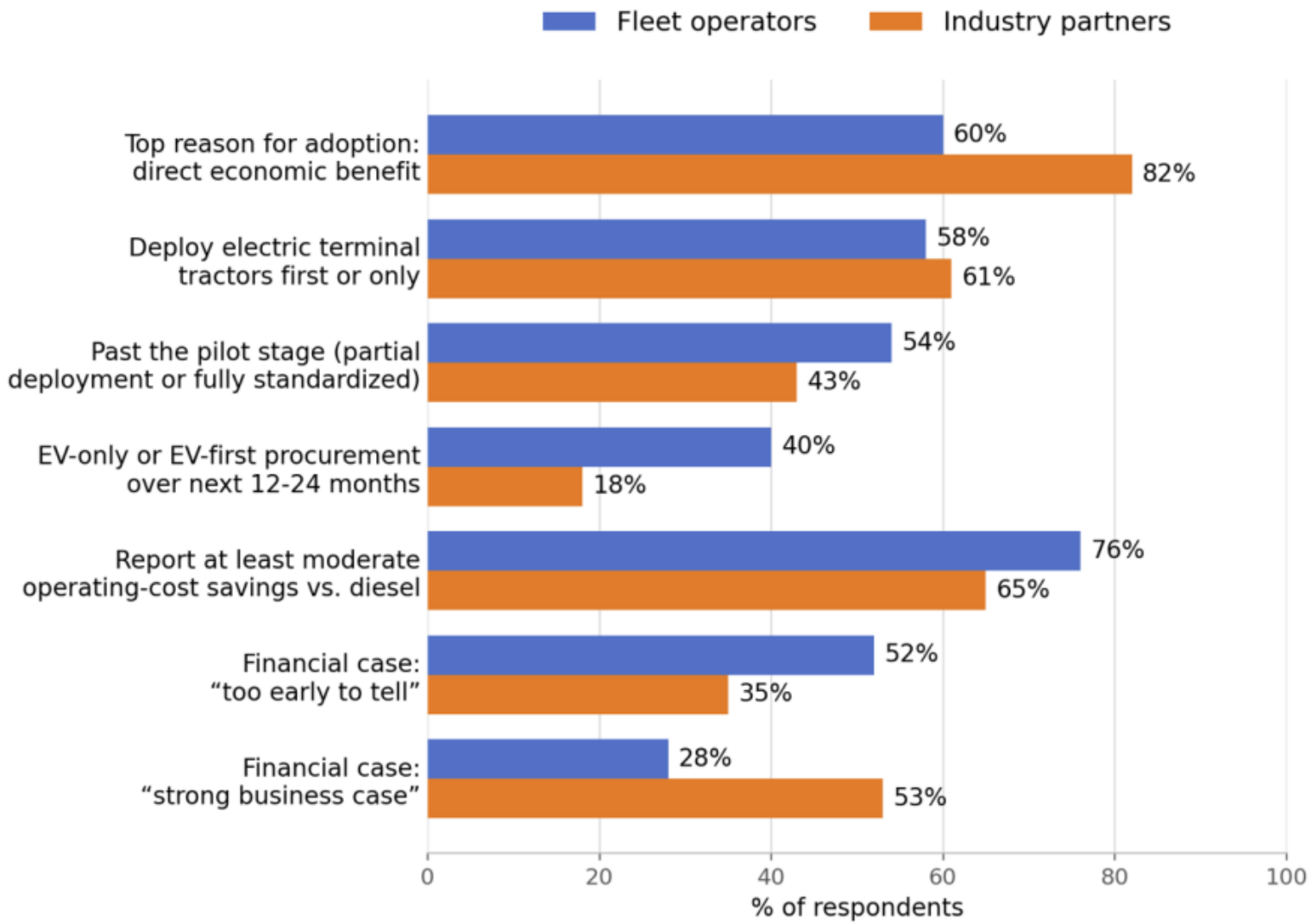
# New Survey and Interviews



# Adoption Drivers

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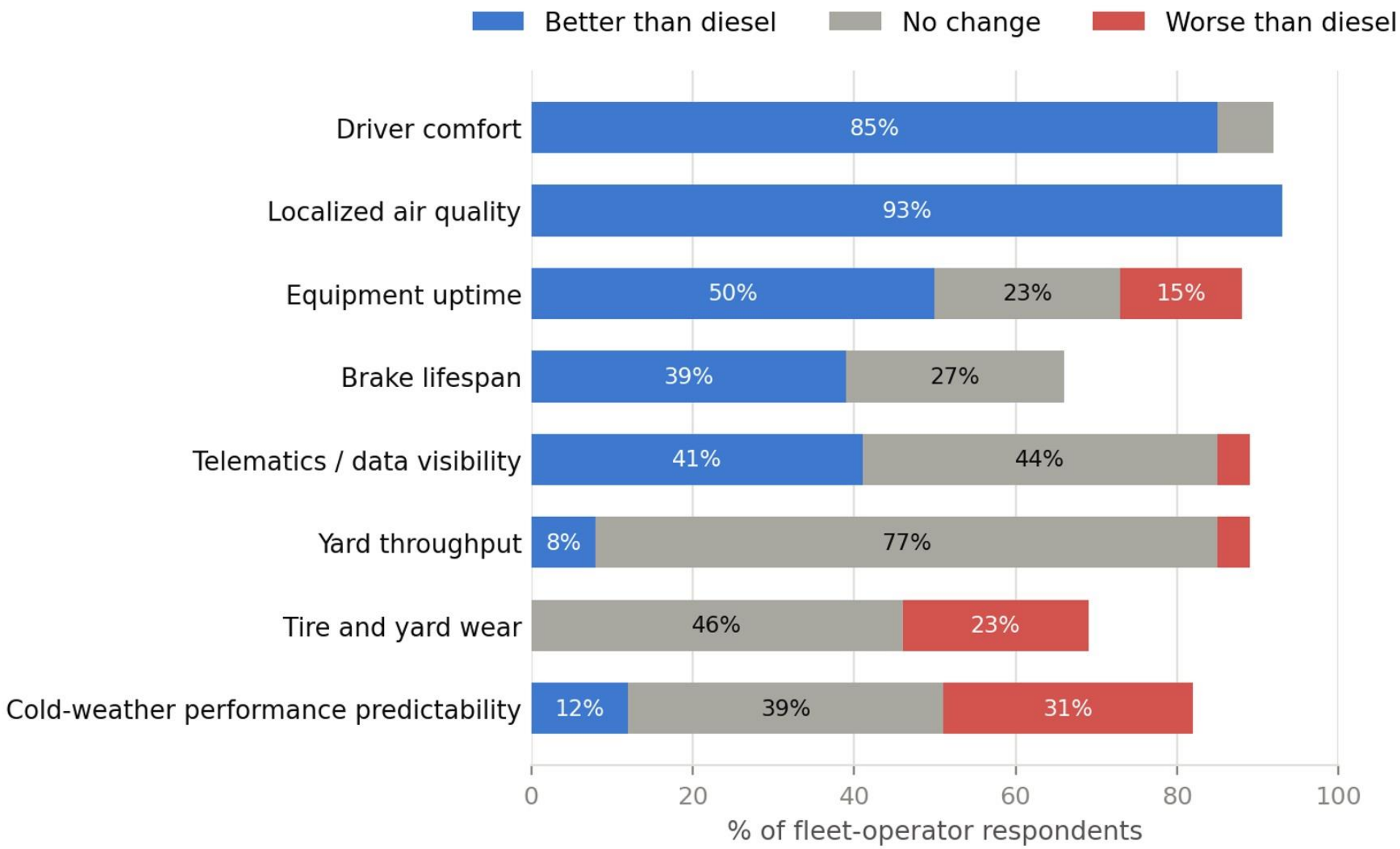
# TT BEV v. Diesel

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# TTEV Fleet Readiness Tool

| Terminal Tractor Electrification Readiness Tool: Scoring Key | | |
|---|---|---|
| **Score** | **Tier** | **Guidance** |
| 21-24 | Strong Candidate | The ideal position to initiate a pilot. |
| 16-20 | Good Candidate | Most of the pieces are already in place. Addressing the remaining gap or two should be enough to move forward with a pilot. |
| 11-15 | Candidate | Several key factors are already favorable. A pilot is recommended, and closing one or two specific gaps – capital, incentives, or infrastructure – will meaningfully improve the odds of a smooth rollout. |
| 6-10 | Marginal | Not yet ready to pilot, but the gap is likely closeable. Identify your lowest-scoring factors and target those directly - capital, incentives, or utility engagement can often be addressed within a few months and would move you into Candidate range. |
| 0-5 | Not Yet a Fit | Multiple foundational factors are missing at once, so no single fix is likely to change the picture soon. Rather than actively pursuing a pilot, monitor for a shift - a new mandate, incentive program, or budget cycle - and revisit when one occurs. |

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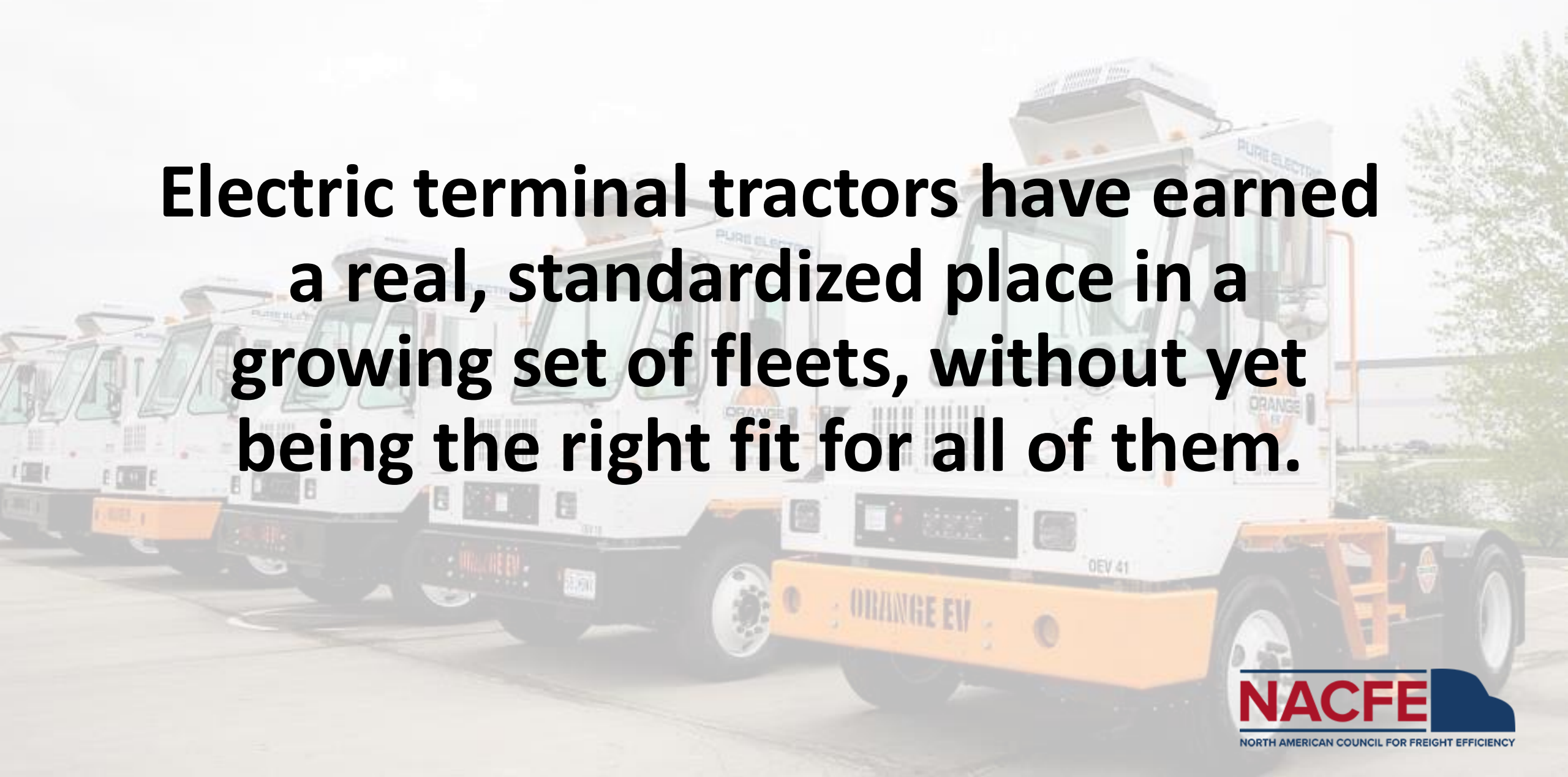
# Key Finding




**Electric terminal tractors have earned a real, standardized place in a growing set of fleets, without yet being the right fit for all of them.**

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# Speakers

## TODAY'S SPEAKERS

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LAZER LOGISTICS

# Chris Bennett

VP - EV Energy & Sustainability

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# Zack Ruderman

VP Sales & Marketing

# Q&A

## Share your questions through the Q&A section.

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# Thank You for Attending!

Contact Orange EV for information on electric terminal tractors.

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