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La Caisse Bets Big on U.S. Energy Land Strategy with \$200M Stake in Renewal

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La Caisse, a global institutional investor formerly known as CDPQ (Caisse de dépôt et placement du Québec), has invested \$200 million in Renewa, a U.S.-based renewable energy land finance firm. The move marks a strategic bet on American energy infrastructure, emphasizing long-term land investment as a critical component of the country's energy future.

In a decisive step toward reinforcing energy infrastructure in the United States, La Caisse has committed \$200 million in primary equity to Renewa, a land-focused renewable energy financing company. Renewa's model focuses on acquiring or leasing land tied to utility-scale energy developments, and the new funding signals strong institutional confidence in U.S.-based renewable energy markets and property-backed investment vehicles.

Renewa, launched in 2022 and backed by infrastructure investment giant QIC (Queensland Investment Corporation), manages a robust portfolio encompassing approximately 26 gigawatts (GW) of renewable energy capacity across 30 states. The firm's land holdings, whether owned outright or controlled through long-term ground leases, cover more than 140 projects and involve partnerships with over 75 clean energy operators. The latest funding round brings Renewa's total capital commitments to over \$750 million when including fresh debt lines.

The investment from La Caisse, known for managing tens of billions in global infrastructure assets, underscores a growing recognition that securing real estate is just as crucial as building the energy technologies themselves. "QIC-backed Renewa is unlocking a critical piece of the renewable energy puzzle: access to land," said Emmanuel Jaclot, Executive Vice-President and Head of Infrastructure at La Caisse. "Given the scale and reach of our global renewable energy projects, we see opportunities with their model."

Rather than investing in volatile technologies or speculative startups, this deal is grounded literally in long-term land value. In many respects, it represents a back-to-basics approach to energy investment, one that leverages property ownership as a hedge against uncertainty while supporting a diversified energy mix.

From a market standpoint, Renewa's strategy is a savvy blend of real estate and infrastructure financing. By securing land early and offering developers long-term ground leases, Renewa helps reduce both upfront costs and long-term risk for energy projects. This model appeals to conservative investors who value stable, predictable returns from hard assets.

The U.S. remains one of the most attractive markets globally for renewable development, not just because of government incentives, but due to its vast land availability, investor protections, and strong property rights. In that context, La Caisse's move reflects a broader trend: institutional capital is increasingly flowing into sectors that offer tangible, scalable, and long-term infrastructure assets, rather than short-term market plays.

As the U.S. energy landscape continues to evolve, strategic land acquisition may prove to be one of the quiet forces shaping the next decade of energy investment. With the backing of a heavyweight like La Caisse, Renewa is well-positioned to lead that shift from the ground up.