

As Tesla preps 'Cybertruck,' electric pickups gain steam. But does anyone want one?

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Eager to tow your camper, haul some wood or go off-roading with your pickup?

Pretty soon, you might not need a drop of gasoline or diesel to make those trips.

Electric pickups are coming. The only question is, will Americans buy them?

Tesla CEO Elon Musk is set to reveal his long-awaited electric pickup on Thursday night at an event in the Los Angeles area, while Ford, General Motors, startup Rivian and others are also pursuing their own models.

But given that pickup owners are famously loyal to their vehicles—especially the full-size Ford F-150, Ram and Chevrolet Silverado—there's no guarantee people will embrace the electric newcomers.

"People buy pickup trucks because they want to

haul something or they want to tow something, and I'm really dubious of the ability of (electric) vehicles to actually do that in a way that's user friendly," said Dan Edmunds, director of vehicle evaluation at car-research site Edmunds, who also spent a decade testing pickups for automakers.

Edmunds questioned whether an electric vehicle can deliver the same capability as gas and diesel models, and said they may also present logistical challenges.

Automakers, however, are pressing ahead—in part because they already sell 2.5 million to 3 million pickups globally every year, according to Sanford Bernstein analysts. They can't afford to lose that highly profitable source of revenue in case pickup fans migrate to electrics.

Pickups are the most profitable segment of the auto industry with high-end prices for gas-powered trucks now approaching \$100,000.

Ford is developing an electric version of the F-150, which is America's best-selling model. GM is planning to assemble an electric truck at a plant in Michigan. Rivian, which counts Ford and Amazon as investors, has said it plans to begin producing its R1T electric pickup in 2020. And a newcomer with plans for an electric truck, Bollinger Motors, is set to make an announcement Thursday at the Los Angeles Auto Show.

The earliest electric pickups could arrive in 2020 with prices nearing about \$70,000 from startup Rivian.

"Everybody's jumping on the bandwagon," said Michelle Krebs, executive analyst at car-buying site Autotrader. "Some people have suggested maybe this will attract a buyer who would like a pickup

truck but would never think about buying a gasoline or diesel one."

'Striking and unconventional'

Musk has repeatedly crowed about Tesla's forthcoming pickup, calling it a "Cybertruck" that will be "futuristic" and will smash convention with its "crazy" torque and a high-tech suspension. He has said it will have an electric battery range of up to 500 miles and will come standard with four-wheel-drive.

"The way Musk has been talking it up, it should be fairly striking and unconventional, as most Tesla models are," said Karl Brauer, executive publisher of Cox Automotive, whose brands include Kelley Blue Book and Autotrader. "He'll be hoping to make a big statement."

But Edmunds said Musk should "be a little bit less bombastic about" the Tesla pickup's supposed extreme capability and explain its practicality.

Electric pickups have serious hurdles to surmount, he said: For starters, they often can't fit next to charging stations when towing a camper or something else, Edmunds said. He once towed an Airstream with a Tesla Model X SUV and had to disconnect the trailer every time he needed to access Tesla's network of Superchargers.

What's more, the Model X's battery range dropped more than half when he was towing the Airstream, Edmunds said. He was forced to turn off the vehicle's air conditioning and drive slowly to preserve battery life to ensure he reached the next charging unit along the highway.

"The only thing worse than running out of gas in the middle of nowhere is running out of electricity," Brauer said.

That's why towing a trailer to a national park or taking it on a water skiing trip might not be feasible for the typical family, Edmunds said.

"I can't imagine doing any of those things with an electric pickup," he said.

Ford recently bragged that its F-150 electric pickup towed a train weighing a million pounds in a demonstration aimed at convincing skeptics of the technology. But will that capability translate into a production model?

Who would buy one?

To be sure, though, consumers might not be the primary intended buyer in the early years of electric pickups.

In a 2018 study by car-buying site CarGurus, only 4% of vehicle owners said the body style they'd most likely consider for an electric vehicle was a pickup truck. It ranked behind sedan, SUV, crossover, hatchback and coupe in the survey.

On the other hand, fleet buyers, such as utility companies or governments, could be a good fit for electric pickups. They can plan repeatable routes with easy access to charging stations and often prioritize fuel savings.

Edmunds said an electric pickup could work well for short-haul deliveries, meter-readers, cable installers and other workers who aren't "hauling a ton of stuff."

"But I don't think that describes a Tesla," he said. "I think that leans more toward the Ford and the mainstream manufacturers that those fleet managers are already familiar with."

Stephanie Brinley, automotive analyst at research firm IHS Markit, said Ford and GM, in particular, are best positioned to corner the market for electric pickups.

"Pickup truck buyers need to be convinced this is a good solution," Brinley said. "Ford and GM have a really strong chance of being able to convince them better than Tesla does, just because they already know this buyer. They're not going to sit back and let somebody walk in and take it from them."

Upstart automakers aren't holding back, however.

Rivian's sleek design and manufacturing strategy have generated significant buzz and investment.

Amazon recently placed an order for 100,000 electric vans from the company, which will use the same electric platform to produce its pickups.

Rivian's pickup is "very attractive looking and they've got a lot of well-regarded industry veterans running that company out of Michigan," Brauer said.

In a sense, Rivian is aiming to become the next Tesla, which has already proven that it has the engineering, design and marketing chops to attract buyers.

"Tesla has made a pretty good habit of breaking existing rules and accomplishing things that haven't been accomplished before," Brauer said. "If (Musk) can engineer a truck with a compelling combination of styling and capability, he'll probably find a more substantial audience than you would expect."

Tesla's base-model pickup could start at about \$50,000, though it's likely to cost much more when options are factored in, while Rivian's R1T starts at \$69,000, according to Wedbush Securities analyst Daniel Ives.

The key question for all of the automakers: When will these pickups arrive?

It could be years before Tesla's pickup becomes available since the company is currently focused on ramping up manufacturing and sales of its Model 3 electric sedan. Rivian is still a year away. And Ford and GM haven't announced a timeline for their pickups.

The bottom line: Don't plan your electric pickup adventures quite yet.

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