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Trucking's Race to Green Energy

The Federal Government and 15 states led mostly by California are pushing truck manufacturers to increase the production of Class 8 electric trucks. By 2035, California expects 75 percent compliance. There are only 1,000 of them in commercial use today.

Electric trucks will not be as easy of a change over as electric cars have been...far from it. It can take ten years for a new truck model to make it from the drafting table to the assembly line. Unlike the average car buyer, trucking companies investing in new tractors expect to make a profit with them. They are tools of the trade. They want lightweight to maximize cargo capacity and to run as many miles as possible before having to stop for fuel. Very importantly, they want to know that when they resell or trade a truck in, technology has not advanced to the point that their truck is now worthless after a couple of years or more of duty.

Our Federal Government is heavily committed to electric power to the extent that agencies are studying the impact of 5,000 extra pounds of battery weight to our nation's roads and bridges. However, the American Society of Engineers recently gave the U.S. a "C-Minus" grade on its infrastructure. Half of the nation's 618,000 bridges were rated "fair to poor," and 40 percent of our roads were rated "poor." The choices are to reduce current weight restrictions by 5,000 pounds and throw a wrench into the supply chain or increase the weight restrictions and cause more stress to our highways and byways.

Electric trucks certainly got a head start in the race away from diesel, but along with battery weight and a steady supply of battery components...electric trucks have many challenges ahead. Current models must stop every three to four hours to spend another three to four hours being recharged. They are much more expensive than diesel...as much as \$100,000 more by 2030. However, what is truly hard to understand is the total cost of ownership. Any trucker buying one needs to add a way to charge it, and then hope there has been massive investment in other charging stations along their regular routes. Putting a new charging station on the map will take years, and there are many parts of our country where it won't even be possible.

Daimler (Navistar) has 40 test model electric trucks on the road now. Giving themselves time to work out the kinks, they are not planning full production until next year. Freightliner and Volvo make more Class-8 trucks than any other. Although they continue to each produce an electric model, they have committed to hydrogen power as the future.

Hydrogen holds the promise of a lower cost of ownership, lighter weight, and more miles before having to refuel. Fueling stations would look much like the truckstops of today...can even use the same ground...and could be located anywhere in the country. The problem has been the low supply of "Green Hydrogen." So, it has been encouraging to see the investments being made into creating more of it. It will take some time, but the turtle wins the race.

Stay safe,
Mark

