

The New York Times

Tesla's Newest Electric Vehicle Could Jolt the Trucking Industry



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To report this article, Jack Ewing rode in a Tesla Semi transporting goods from the Port of Long Beach to Ontario, Calif.

- May 19, 2026

Tesla hasn't had a blockbuster new product since the Model Y sport utility vehicle went on sale in 2020.

But early reviews of the Tesla Semi, an electric heavy truck, suggest that it could be a much-needed hit for the company. And it could shake up the staid business of truck manufacturing in the same way that Tesla's cars upended the auto industry.

After years of delays, Tesla has begun taking orders for the Semi, which is expected to cost around \$290,000 for the version that can travel up to 500 miles on a charge, much less expensive than heavy-duty electric trucks sold by Daimler, Volvo and other companies, which usually sell for at least \$400,000, according to estimates by the International Council on Clean Transportation. Tesla has said the Semi will also have a more affordable model that can travel 350 miles between charges. Both options would travel farther than trucks from other suppliers.

Cost and range are two of the main reasons that many logistics and delivery firms have been reluctant to buy electric trucks, which cost at least twice as much as diesel models and account for only a sliver of heavy truck sales.

"The problem with the technology that's out there right now is their range is limited. They're quite heavy, and they're very expensive," said Jennie Abarca, owner of King Fio

Trucking in Long Beach, Calif., which has ordered 20 Tesla Semis. “This is something new coming to the market that kind of answers all those problems.”

Demand for the Semi appears strong. California trucking firms have asked the state government for subsidies to help them buy more than 1,200 Tesla trucks. That’s more than all the applications for other electric trucks since the state’s incentive program began in 2019.

Ivan Torres, a driver for Nevoya, a San Francisco-based trucking company, is a big fan of the Semi. He was at the wheel of one last month hauling power tools from the Port of Long Beach to Ontario, Calif., 60 miles away. Nevoya operates only electric trucks.

As the truck climbed a steep hill that separates Ontario from greater Los Angeles, Mr. Torres marveled at its power. “It hauls the load like nothing, just up,” he said from the padded driver’s seat, which sits atop a shock absorber that smooths out the bumps. Screens on either side of the steering wheel provided a view of the traffic around him.

“It hauls the load like nothing, just up,” Ivan Torres, a driver for Nevoya, a San Francisco-based trucking company, said of the Semi.

Mr. Torres said the Semi was quieter than diesel rigs. And he can run the air-conditioning while waiting to drop off a load. That is sometimes not possible with diesel trucks because California limits how long those vehicles can idle in residential areas or near schools and hospitals to minimize pollution.

If Tesla can push the trucking industry toward battery power, the environmental implications could be significant. Heavy- and medium-duty diesel trucks make up a small percentage of all U.S. vehicles but are responsible for 45 percent of nitrogen oxide emissions from road transportation, according to the Union of Concerned Scientists. Nitrogen oxides cause asthma and bronchitis and are the main component of smog.

Tesla’s timing may also be fortuitous. Diesel prices have risen around 50 percent since the war with Iran began, making battery power more attractive. Electricity is much cheaper per mile — even in California, where utility rates are relatively high.

So far, Tesla has produced the Semi in limited numbers for a few customers like Pepsi and Nevoya. But the company said last month that it had started an assembly line in Sparks, Nev., designed to produce up to 50,000 trucks a year.

If Tesla meets that target, the Semi could bring in tens of billions of dollars in revenue. That is still a modest amount compared with the trillions of dollars that Elon Musk, the chief executive of Tesla, expects from self-driving taxis and humanoid robots.

Wall Street investors believe the company will dominate those two futuristic technologies. But Tesla has yet to perfect them or earn much money from them.

The Semi “could be a very nice additive revenue stream,” said Ben Rose, president of Battle Road Research, who closely tracks Tesla. “But it won’t be the kind of blockbuster that some of the products that they’re working on would be.”

Tesla did not respond to a request for comment.

Most electric trucks on the road today are in California, New Jersey, New York and other states that offer incentives for their purchase. Such vehicles tend to carry loads relatively short distances.

Ms. Abarca’s firm specializes in hauling containers from the Port of Long Beach around the Southwest. Tesla is building chargers powerful enough to add 300 miles of range in half an hour, putting cities like Las Vegas within reach, she said. Half an hour is a standard amount of mandatory rest time for truck drivers.



Jennie Abarca, owner of King Fio Trucking in Long Beach, Calif., has ordered 20 Tesla Semis.

Whether Semis save money for their owners depends on how they use them.

“The more you drive it, the more you’re going to get those fuel savings from electricity being cheaper than diesel,” said Jacob Richard, trucks project manager at Calstart, a nonprofit group whose members include energy producers, carmakers and other businesses that promote clean energy.

More than a decade ago, Tesla permanently changed the auto industry when it introduced the Model S sedan, proving that electric cars could be practical and fun. Established car companies initially dismissed electric cars as a niche product. But later they spent billions of dollars to trying to catch up with Tesla, which still accounts for roughly half of U.S. electric car sales.

“It’s the same movie,” Adam Browning, chief strategy officer of Forum Mobility, which provides charging and other services for electric trucks, said of the Semi’s potential to disrupt the industry.

Still, established truck makers say they’re not worried that the Semi will lure away their customers.

Vehicles at Forum Mobility, which provides charging and other services for electric trucks.

“I don’t think it’s disruptive,” said Peter Voorhoeve, president of Volvo Trucks North America. The Swedish company’s VNR Electric heavy-duty truck has a range of 275 miles.

Mr. Voorhoeve said Volvo, which owns Mack Trucks, planned to introduce a new model that will have a longer range next year, but he declined to provide details. Volvo, with its years of experience, provides the service and reliability that fleet owners demand, he added.

John O’Leary, the president of Daimler Truck North America, which owns Freightliner, said electric trucks were not practical for long trips because there were not enough high-powered chargers. “Infrastructure continues to be a challenge,” he said.

Volvo and Daimler say they are committed to reducing emissions, but they have filed a lawsuit to prevent California from enforcing clean-air standards for trucks that they agreed to in 2023. The manufacturers say they are caught between the state government and the Trump administration, which has been dismantling regulations.

Trucking firms say they have been impressed by Tesla. The company has invited potential customers to tour its Nevada factory, made assurances about providing service for vehicles and outlined plans to install chargers along major highways in California, Nevada, Arizona, Texas and other states. Tesla separately operates the largest U.S. fast-charging network for electric cars.

Mr. Torres, the Semi driver, had trouble getting a charger to work at a truck stop in Ontario last month. But after a colleague reported the problem, Tesla quickly fixed it.

Jack Ewing covers the auto industry for The Times, with an emphasis on electric vehicles.

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