

Is the Era of Pickup Truck Dominance in Thailand Coming to an End?

September 2025



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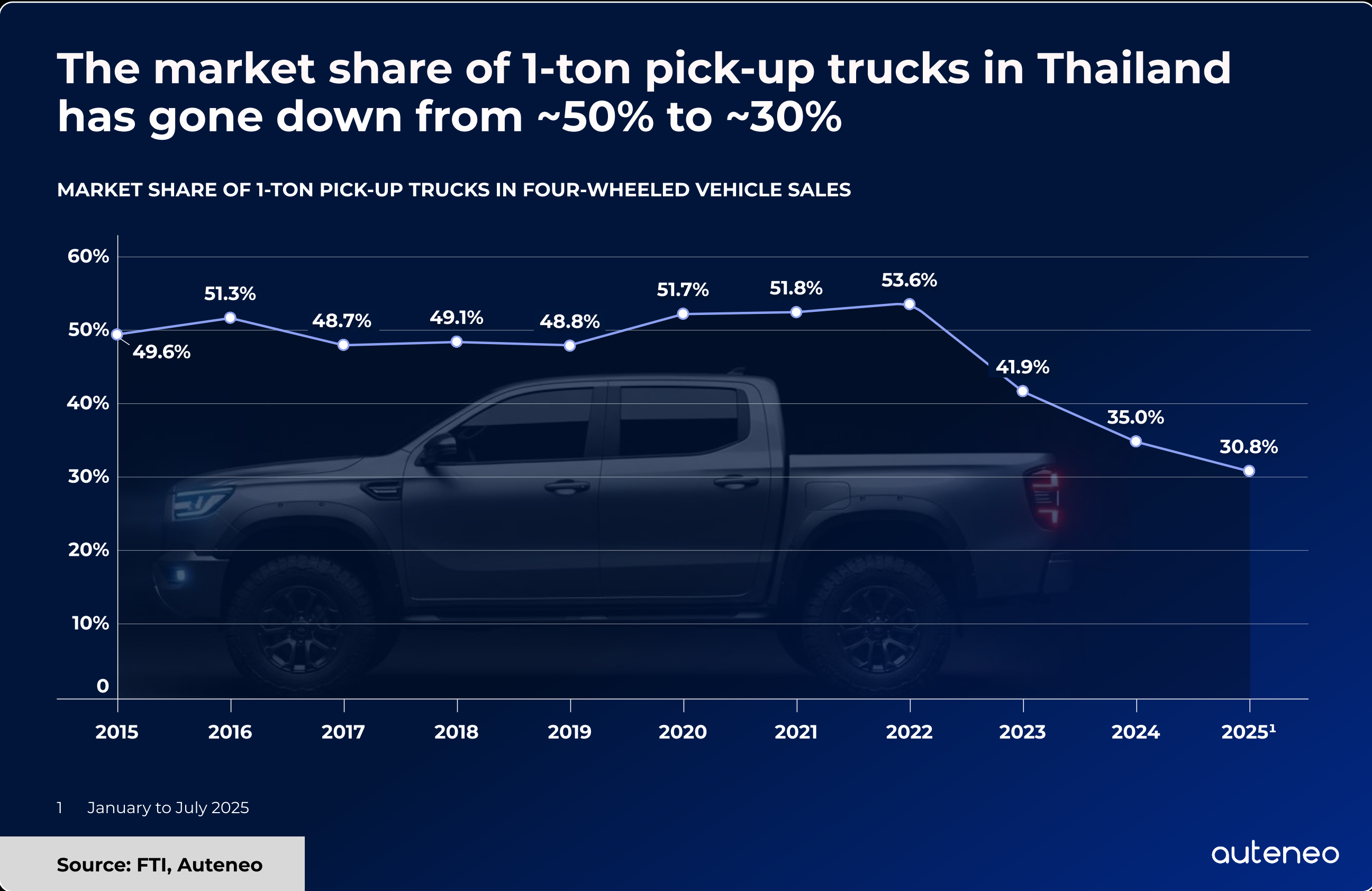
Is the Era of Pickup Truck Dominance in Thailand Coming to an End?

For decades, the one-ton ICE pickup truck has been the undisputed king of the road in Thailand—an icon of utility, commerce, and daily life. But a seismic shift is underway, one that is rapidly redrawing the country's automotive landscape. New data reveals that the pickup's market share is in a steep decline, partly at the cost of some unlikely replacements—non-pickup BEVs (Battery Electric Vehicles) that are proving to be good enough for former truck owners.

A Market in Transformation: The Data Tells the Story

The numbers are stark. The market share of traditional one-ton ICE pickup trucks in Thailand has plummeted from a steady ~50% between 2015 and 2022 to just 30.8% in the first seven months of 2025 (See *Exhibit 1*).

EXHIBIT 1



Many insiders point to tightening finances as the biggest driver. Stricter auto loan criteria and high household debt are squeezing buyers in Thailand. This especially hits the pickup's core demographic: upcountry customers whose incomes can be more volatile. Historically, the pickup was the answer for these price-sensitive buyers as the cheapest vehicle offering good cargo capabilities and decent passenger space, though it was not the most fuel-efficient. Recently, due to less access to loans, this customer group is more likely to not be able to afford a new vehicle than other customer groups, which drives the market share down. But, is that the full story?

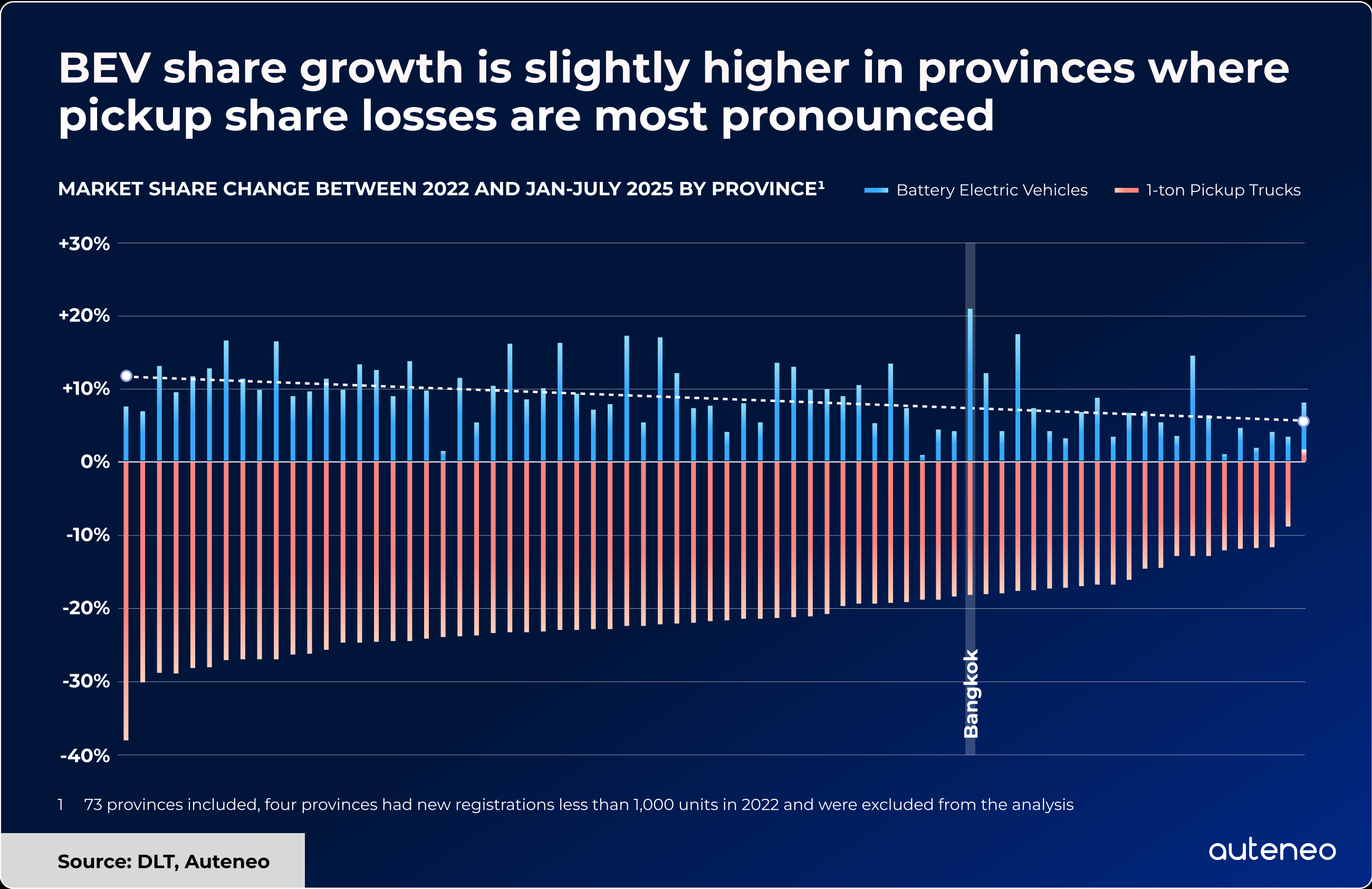
BEV adoption is surging across the nation. In the first 7 months of 2025, BEV market share reached 18%. A significant growth from 1% in 2022. High adoption growth is not only seen in Bangkok but across the

provinces as well — 35 provinces (out of 77 in total) have recorded more than 10% BEV market share in the first seven months of 2025 so far vs. 8 provinces in 2024.

On one hand, ICE pickup trucks are losing market share; on the other, BEVs are gaining ground. Yet, it would be too far-fetched to conclude that buyers are simply abandoning ICE pickups in favour of non-pickup BEVs. But what happens if we look at the data at a more granular, provincial level?

The data shows an inverse relationship: provinces with the steepest declines in 1-ton pickup share have seen stronger growth in BEV adoption (**See Exhibit 2**). This lends more evidence of a correlation between declining pickup sales and rising BEV uptake, though it stops short of proving a direct causal link.

EXHIBIT 2



The Importance of Effective Social Listening

The online conversations we analyzed suggest a more direct shift: there is evidence that some buyers are moving away from ICE pickup trucks and toward non-pickup BEVs.

The biggest force behind this market shift? Fuel cost savings. For Thai consumers long reliant on gas-guzzling pickups, the math is becoming impossible to ignore.

One user shared a striking comparison: a long-distance trip in their BEV cost just 2,000 baht¹ in electricity—half the 4,000-plus baht it would have taken in their old pickup. Another Jaecoo 6 EV owner reported saving more than 5,400 baht in their very first month. For many, these numbers outweigh traditional loyalty to the pickup.

Note: 1 USD = approx. 31 Thai baht, as of September 2025

But what about practicality? The belief that a pickup is essential for cargo capacity is being questioned. Owners of MG S5 EV and BYD Sealion 7 report that their new BEVs handle daily needs with ease. One owner even admitted that since getting their EV, the pickup has sat unused in the driveway.

While non-pickup BEVs cannot replace trucks for heavy-duty hauling, they are proving to be more than adequate for a growing segment of buyers—and far cheaper to operate.

The Rise of the BEV Pickup? A Glimpse into the Current Feedback

While non-pickup BEVs are capturing former pickup truck owners, a dedicated BEV pickup segment is also emerging to meet the needs of those who still require true truck utility. This segment is nascent, with limited product offerings and official new registrations counted in the hundreds, not thousands. However, to understand its potential and the hurdles it faces, we need to look beyond sales figures and into the vibrant, detailed, and often-contentious online conversations happening among the earliest adopters and influencers.

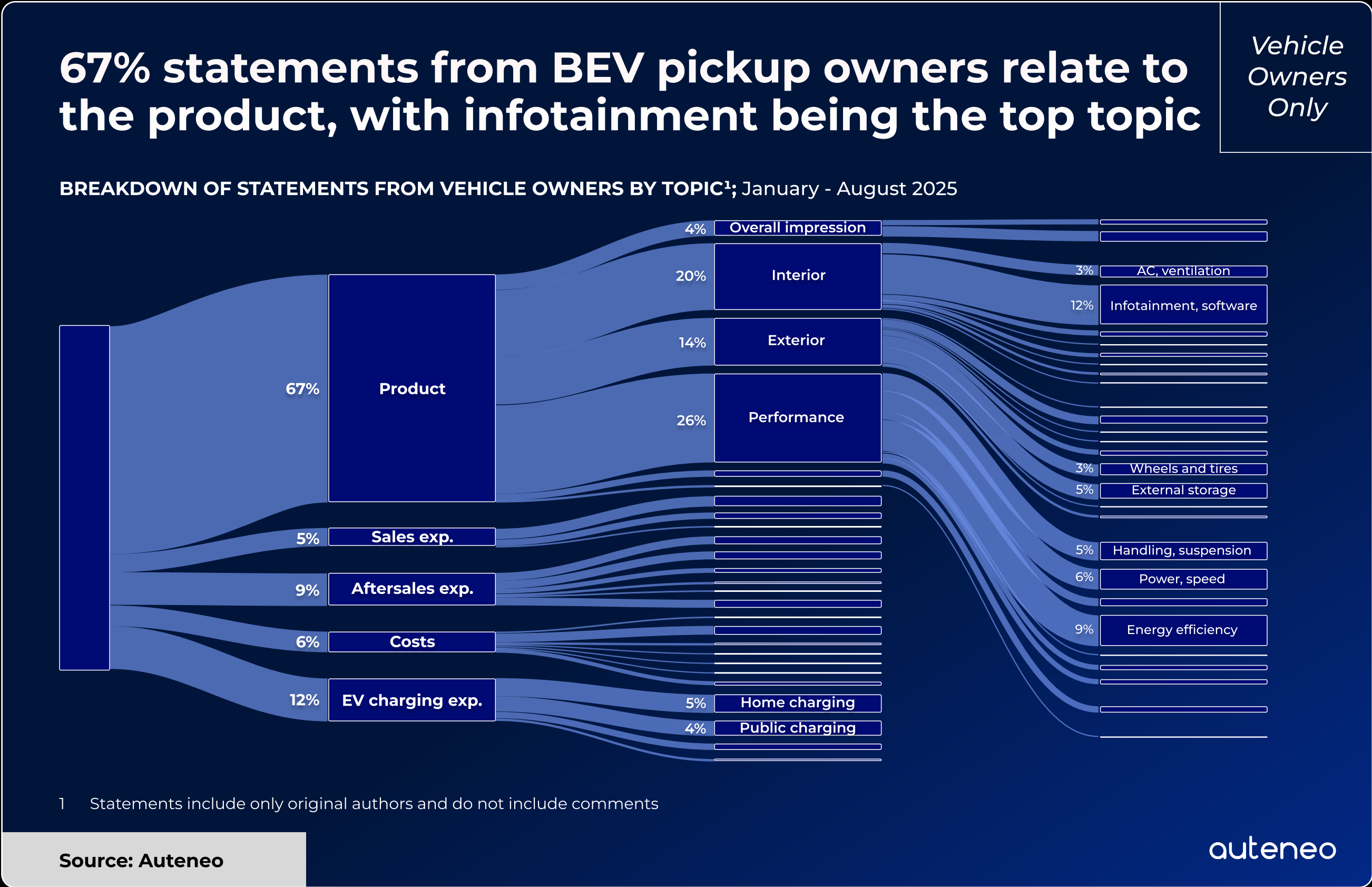
By analyzing over 3,500 statements from online users including shoppers, influencers, and, most importantly, owners of existing models of BEV pickup trucks, we can map out the real-world hopes, frustrations, and debates that will define the future

of this critical vehicle category in Thailand. These conversations reveal a vehicle class full of paradoxes: very capable yet unrefined, economically revolutionary but with significant upfront risks.

The Core Debate: Can It Actually Work?

The vast majority of discussions online relate to the product itself (**See Exhibit 3**). The single most urgent question for any new pickup is whether it can handle the demanding work expected of it. Online, this question sparked debates between skeptics and owners, with the latter sharing a series of high-stakes, real-world tests documented by owners and influencers. Skeptics initially dismissed these new electric trucks as city trucks, suitable for comfortable errands like taking kids to school, but unfit for heavy-duty tasks. This narrative, however, is being gradually dismantled.

EXHIBIT 3



We've seen owners and influencers pushing BEV pickup trucks to the absolute limit and sharing the results. One user documented towing a 3-ton trailer up the notoriously steep and winding roads of Doi Ang Khang—a feat that many believed would be impossible, predicting motor failure or a catastrophic battery drain. The successful ascent, shared with photos and videos, served as a powerful public validation. Another user, who operates their truck commercially to haul over 3 tons of fresh chicken, ice, and equipment, provided meticulous data logs. Their posts show the truck not only handles the load but does so with good stability and efficiency, all within the manufacturer's specified towing capacity. These "power users" are effectively proving that the high torque of electric motors provides a tangible advantage for hauling and climbing, shifting the community's conversation from "if it's possible" to "how it's done."

The Economic Equation: A Revolution in Running Costs

Beyond raw capability, the most compelling argument driving interest in BEV pickups is the potential for cost savings. The numbers shared by owners are transformative. One user reported their monthly fuel bill plummeting from 12,000 baht for their previous diesel truck to just 4,000 baht in electricity. Another compared a 2,300 baht full tank of diesel to a 500 baht full charge. For business owners, it's a significant saving, with one user calculating their cost-per-kilometre for heavy towing at just 0.90 baht, compared to an estimated 4 baht for a diesel equivalent. The switch to electricity also eliminates the risk of fuel theft—another tangible saving for commercial operators.

However, the debate is far from one-sided. Online users point out that currently available BEV pickup trucks have a high initial purchase price, they are subject to more expensive insurance premiums (an extra 5,500 baht/year in one owner's case), and they fear high out-of-warranty repair costs for components like motors or batteries. While some argue that the Total Cost of Ownership (TCO) is favourable for BEV pickup trucks when factoring everything, including the elimination of expenses for oil changes, transmission fluid, and other routine engine maintenance, the current purchase price is certainly holding back some buyers from pulling the trigger.

Redefining Utility: Beyond Payload and Towing

These online discussions also reveal that the utility of a BEV pickup truck extends far beyond traditional metrics. Unique EV-specific features are creating new use cases that ICE trucks simply cannot match. The Vehicle-to-Load (V2L) capability, which allows the truck to function as a massive mobile power bank, has captured the public's imagination. One user demonstrated powering a large concert-grade sound system for an entire day, sparking immediate discussions about using the truck for paid event gigs or even turning it into a mobile party truck for festivals and street processions—all without a noisy, polluting generator.

Another praised feature is the ability to run the air conditioning for hours, or even overnight, with small battery drains, resulting in a lower cost compared to idling an ICE vehicle. For those who spend long time waiting in their vehicles or for families on long trips, this is a big plus for comfort. One owner shared a photo of himself sleeping comfortably in the cab overnight while waiting to pick up goods, effectively saving on hotel costs and further bolstering the vehicle's economic advantage.

“ 4 months, 18,000 km.
Haven't paid a single baht
for servicing yet.
Only paid for electricity
and coffee.
I'd say it's worth it. ”

Owner of Riddara RD6

The Verdict in Numbers: Balancing Hype and Reality

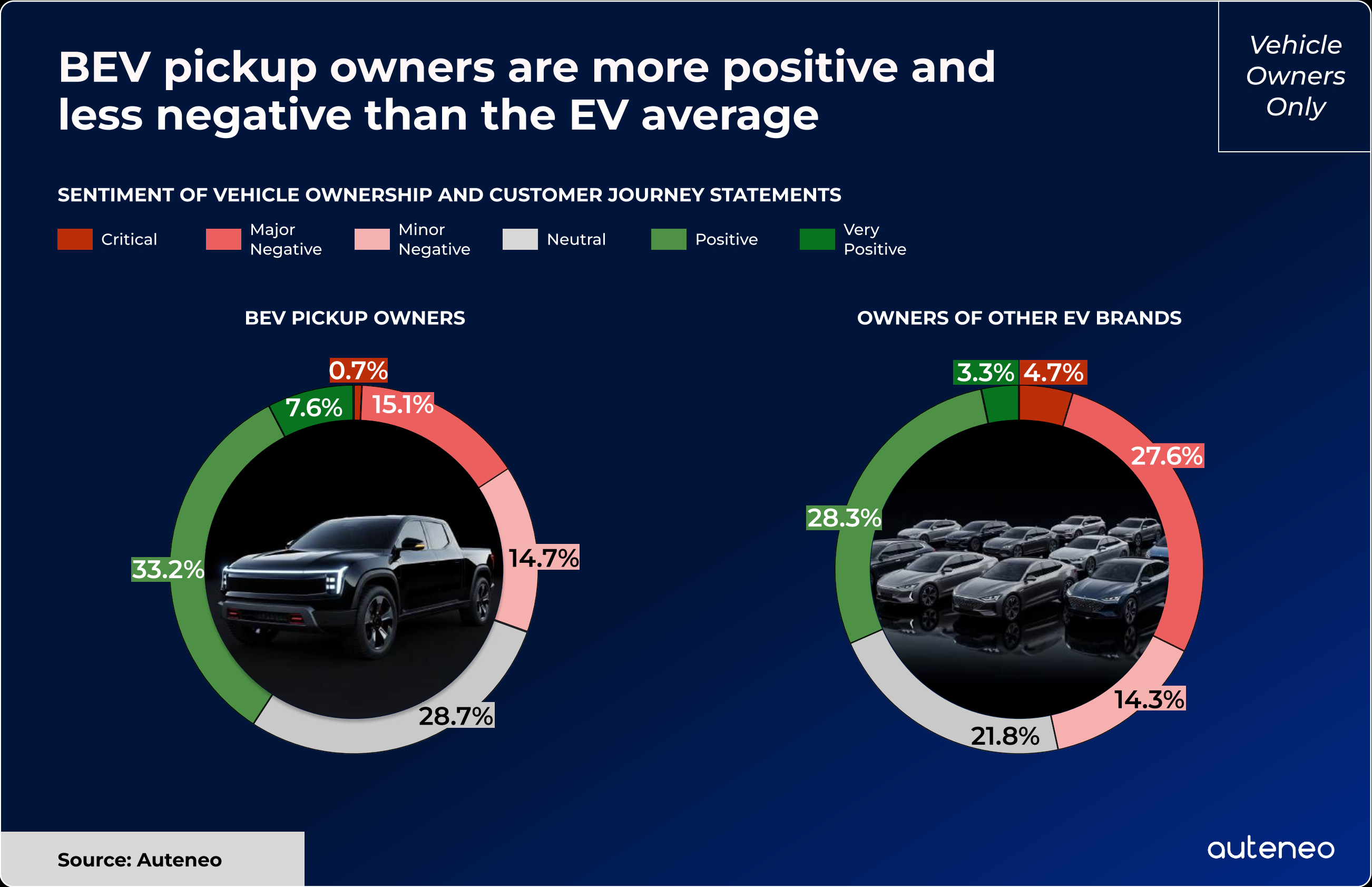
The stories of mountain-towing feats, revolutionary cost savings, and newfound utility paint a compellingly positive picture. But does this enthusiastic narrative reflect the complete ownership experience? To answer this, we can move beyond individual anecdotes and look at the aggregated sentiment of the entire online conversation.

Our analysis (*See Exhibit 4*) shows that BEV pickup owners give significantly more positive feedback (41%) and far less negative feedback (31%) when compared with the EV industry average, which stands at 32% positive and 47% negative, respectively. This would indicate that there is a genuinely enthusiastic early

adopter community that is, on the whole, much happier than the average EV owner in Thailand.

However, this impressive performance comes with an important caveat. The positive sentiment is partially due to a "honeymoon effect," as new owners are often more enthusiastic, and certain long-term product or aftersales issues may not have surfaced yet. Therefore, it is crucial to dive deeper into the negative feedback, which accounts for nearly a third of all statements, to better understand if there are any recurring problems that are already impacting the ownership experience and could pose a greater threat to the reputation and sales of BEV pickup trucks over time.

EXHIBIT 4



The In-Cabin Experience: A Mix of Modern and Outdated

The most frequently and passionately discussed frustrations are focused on the vehicle's software and interior features. For a vehicle representing the future, several elements feel outdated. While some might assume pickup buyers are less demanding of tech, a large and vocal group online clearly expects more, even from this first generation of BEV pickups:

- **Software and Infotainment:** The lack of Apple CarPlay and Android Auto is almost universally cited as the single biggest frustration, forcing drivers into a "digital dark ages" of clunky Bluetooth connections. This is compounded by laggy central touchscreens that are too bright at night without a proper auto-dimming function, and a notoriously low-quality rear-view camera, memorably described by one owner as so bad you "can't even read the license plate of a car you're about to hit."
- **Component Quality:** Beyond software, owners point to a number of components that feel subpar. The stock sound system is frequently described as flat and lacking depth. The headlights rely on basic reflectors rather than modern projectors, and the roof panel is perceived by some as surprisingly thin.

Build Quality and Ergonomic Oversights

Owners voice disappointment about missing "standard" features that impact daily usability, such as passenger grab handles and side steps on 2WD (two-wheel drive) models, which makes entry difficult for elderly or shorter passengers. The community also highlighted the choice of original tires as a significant issue. Owners universally agree that the factory-equipped tires are cheap and harsh, and that swapping them for a quality set from a known brand transforms the vehicle's ride comfort. The consensus is that the truck's good suspension is being hampered by a simple, cost-cutting measure.

Overly Sensitive Systems and Design Quirks

Many users report that the driver-assist systems are poorly calibrated for the realities of Thai driving. The Forward Collision Warning is often described as over-sensitive, while the Rear Cross-Traffic Alert can mistake shadows for obstacles and slam on the brakes unexpectedly while reversing. This has led many

owners to simply disable the very safety features they paid for. Furthermore, owners have discovered frustrating "problems by design," such as the keyless entry on the 2WD model only working on the driver's side door, or a software limitation where scheduling a charge automatically forces the battery to 100%, a concern for those wanting to preserve long-term battery health.

The Financial Hurdle: A Prohibitive Price for a Workhorse

Beyond the product's flaws, the high initial purchase price remains the primary barrier to wider adoption. While the long-term Total Cost of Ownership (TCO) is compelling, that argument is irrelevant for buyers who cannot secure a loan for an upfront cost of the vehicle. For the traditional pickup's core demographic—business owners and upcountry buyers who view the truck as a tool for commerce—the current price point is a financial obstacle. A work vehicle is an investment that needs to pay for itself, and a high purchase price extends that payback period and increases financial risk, holding many potential buyers back.

The Unmet Demand: What the Market Really Wants

The high initial price point is a reason why the demand for different vehicle configurations has become widespread online. While the currently available four-door models are praised for their SUV-like comfort, users overwhelmingly state that the true volume market lies in commercial applications. The call for a single-cab or space-cab version is a common theme from business owners who need maximum bed space and payload, not rear passenger seats. A simpler, more affordable, work-focused model is not just a 'nice to have'; it is considered essential for BEV pickups to truly penetrate the Thai market and challenge ICE incumbents for the crown.



The Path Forward: Who Will Wear the New Crown?

The seismic shift in Thailand's automotive market is happening now. The throne once occupied by the one-ton ICE pickup is now vacant, and the battle for succession is underway. For legacy automakers, this is a moment of existential threat. For new BEV brands, it represents a once-in-a-generation opportunity. Our deep dive into the data and, more importantly, the digital conversations of real-world users, points to a blueprint for any brand aspiring to wear the new crown.

The opportunity is not merely to build an electric version of a pickup truck, but to deliver a fundamentally superior tool for life and work in modern Thailand. The path to victory isn't about replicating the past; it's about solving the problems of the present. We believe that the brands that succeed will be those that execute flawlessly on three critical fronts:

1. Master the Fundamentals of Trust and Quality

A powerful electric motor and impressive towing stats are the entry ticket, not the grand prize. The goodwill earned from a powerful drivetrain can be erased by aftersales issues or a frustrating software bug. Brands must invest in a robust, responsive after-sales service network that can handle complex issues and treat customers with respect. They must adapt to the demanding modern customer—fix the lack of Apple CarPlay/Android Auto, the poor-quality cameras, the subpar stock tires. In a market nervous about new technology, trust is the most valuable currency over long-term.

2. Weaponize the Economic Revolution

The single greatest force driving this entire market shift is the brutal reality of fuel costs. The most successful marketing will not be about lifestyle or image, but about hard numbers. It will be about showcasing the owner who saves 8,000 baht a month, the business that cuts its per-kilometre cost by 75%, or the family that can now afford trips because the "fuel" is much cheaper. Every testimonial, every data log, every real-world example of financial savings is a powerful weapon in this new battle. Brands must relentlessly amplify this message, framing their vehicle not as a purchase, but as a financial investment that

pays dividends every single day.

3. Target the True Volume Market

While the double-cab is the top-seller in the overall ICE market, the online pleas for single-cab and space-cab BEVs point to a crucial strategic gap. This is the voice of the commercial user who sees the current four-door BEV as an expensive compromise. They are demanding a pure, affordable work tool that maximises payload over passenger space. The first brand to deliver this dedicated electric workhorse will be unlocking a vital commercial segment that remains unconvinced by the current offerings.

The New Battlefield: A Three-Way Race for Utility

The era of the pickup truck's undisputed dominance in Thailand might be over, but no single successor has emerged. Instead, a once-monolithic market is fracturing into a complex new battlefield with three distinct fronts.

The first threat comes from an unexpected direction. As our analysis shows, a portion of its former territory is being annexed by unlikely contenders: non-pickup BEVs. For some former owners, the fuel cost savings and comfort of an electric sedan or SUV outweigh the utility of a truck bed they rarely use. For these buyers, "good enough" has become the new perfect.

Simultaneously, a second battle is emerging within the pickup segment itself. The new BEV pickups are poised to conquer daily commerce, where predictable routes and low running costs are paramount—especially for owners who primarily charge at home or work, as **public charging networks remain far from perfect**. This leaves the traditional diesel workhorse to defend its heartland: demanding long-haul journeys with heavy loads, where refuelling speed and the certainty of infrastructure remain critical, unbeatable advantages.

The blueprint for success is not a secret locked in a boardroom. It is being written, debated, and refined in real-time, every single day, in customers' minds and in thousands of online posts and comments they write. The brands that will dominate the next decade won't be the ones with the loudest marketing, but the ones with the best ears—and the courage to act on what they hear.

About Auteneo

Auteneo is a market intelligence company that specialises in the automotive sector of Southeast Asia. Our focus is to provide "decision-grade intelligence" to clients by combining in-depth automotive industry knowledge with sophisticated data analysis.

Auteneo's core offering is an AI-powered customer insights platform designed to give automotive brands a deep and immediate understanding of what customers care about. It analyses millions of data points from genuine online discussions to reveal what car owners and buyers are praising and complaining about, enabling faster and smarter decision-making.

Learn about the platform: www.auteneo.com/echo

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