



URBAN SCIENCE®

Quarterly

Electrified Vehicle Retail Sales Report

Q2 2025

Data as of 6/30/2025

Report Overview

This electric vehicle (EV) retail sales report features Urban Science's proprietary 2025 sales insights through July 7, 2025, for the battery electric vehicle (BEV), plug-in hybrid electric vehicle (PHEV) and hybrid electric vehicle (HEV) segments, and state-level sales insights for the nation's top five states for electrified vehicle retail sales volume.

Urban Science® DataHub™

The Urban Science® DataHub™ powers our advanced solutions with unparalleled industry sales* data — updated daily — that doesn't rely on modeled or delayed vehicle registration data. This exclusive resource ensures unmatched data accuracy and immediacy, covering 96% of new vehicle sales and 99% of certified pre-owned (CPO) sales at the Retail Delivery Reporting (RDR) level.

About Urban Science

Urban Science is a leading automotive consultancy and technology firm that serves automotive original equipment manufacturers (OEMs) and dealers, and the advertising technology companies that support them, around the world. Headquartered in Detroit and operating in 20 office locations globally, Urban Science taps the power of its science — and its unrivaled data, solution offerings and industry expertise — to create clarity for clients in even the most chaotic market conditions. Visit UrbanScience.com for more information about how Urban Science helps automotive manufacturers and dealers gain a competitive edge by taking the guesswork out of critical business decisions, and in turn drives improved efficiency and profitability industrywide.

OPERATING	EMPLOYING	SERVING	PROVIDING SOLUTIONS TO	WORKING WITH
20	750+	100+	20K+	50+
GLOBAL OFFICES	EXPERTS	COUNTRIES	DEALERSHIPS	OEMs GLOBALLY

* Sales refers to vehicle unit sales and does not represent vehicle price or revenue

** Electrified vehicles include all major electric powertrains (PHEV, BEV, HEV)

Retail Sales Overview

Data as of 6/30/2025

Q2 2025 U.S. Retail Sales

4/1/2025 - 6/30/2025



3,294,718

Total Industry Sales (all powertrains)



805,477

Electrified Vehicle Sales



24.4%

Electrified Vehicle Market Share



16.5%

YoY EV Sales Volume Growth

(Apr 1, 2025 - Jun 30, 2025 vs Apr 2, 2024 - July 1, 2024)



+3%

YoY EV Market Share Change

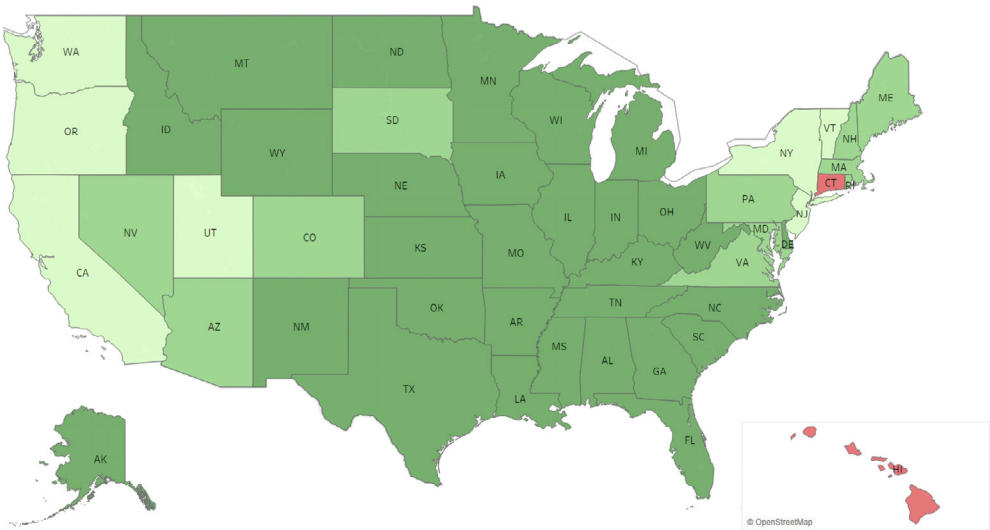
(Apr 1, 2025 - Jun 30, 2025 vs Apr 2, 2024 - July 1, 2024)

Q2 Growth

YoY EV Retail Sales Volume Growth

Apr 1, 2025 - Jun 30, 2025 vs Apr 2, 2024 - July 1, 2024

+16.5%



Q1

+29.6%

Jan 3, 2025 - Mar 31, 2025 vs.
Jan 3, 2024 - Apr 1, 2024

BEV Retail Sales Analysis

Data as of 6/30/2025

Q2 2025 U.S. Retail Sales

4/1/2025 - 6/30/2025



269,457
BEV Sales



8.2%
BEV Market Share



-8.3%
YoY BEV Sales Volume Growth
(Apr 1, 2025 - Jun 30, 2025 vs Apr 2, 2024 - July 1, 2024)

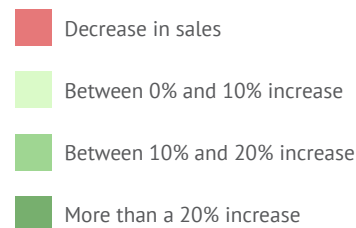
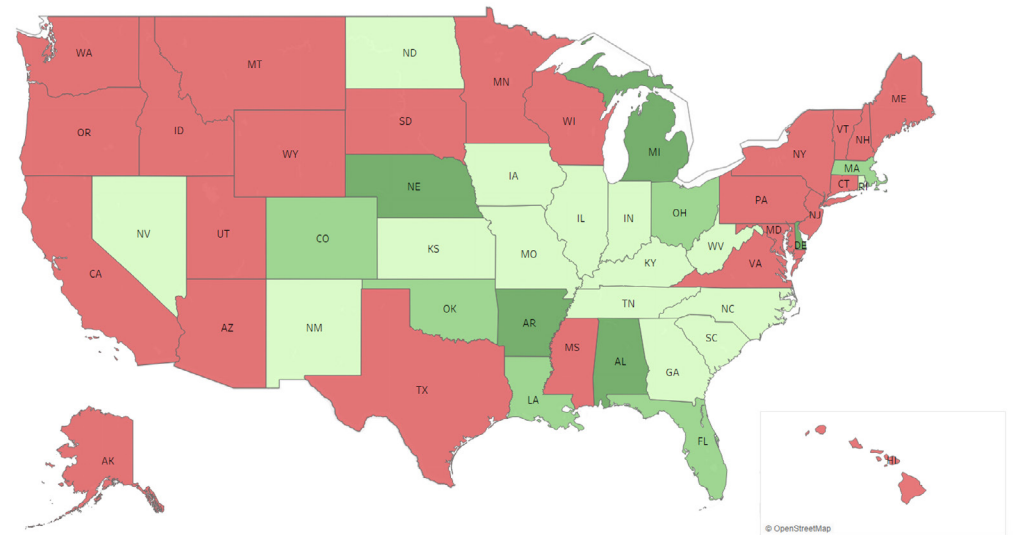


-0.9%
YoY BEV Market Share Change
(Apr 1, 2025 - Jun 30, 2025 vs Apr 2, 2024 - July 1, 2024)

Q2 BEV Growth

YoY BEV Retail Sales Volume Growth
Apr 1, 2025 - Jun 30, 2025 vs Apr 2, 2024 - July 1, 2024

-8.3%



Q1

+15.4%

Jan 3, 2025 - Mar 31, 2025 vs.
Jan 3, 2024 - Apr 1, 2024

PHEV Retail Sales Analysis

Data as of 6/30/2025

Q2 2025 U.S. Retail Sales

4/1/2025 - 6/30/2025



64,141
PHEV Sales



1.9%
PHEV Market Share



0.3%
YoY PHEV Sales Volume Growth
(Apr 1, 2025 - Jun 30, 2025 vs Apr 2, 2024 - July 1, 2024)

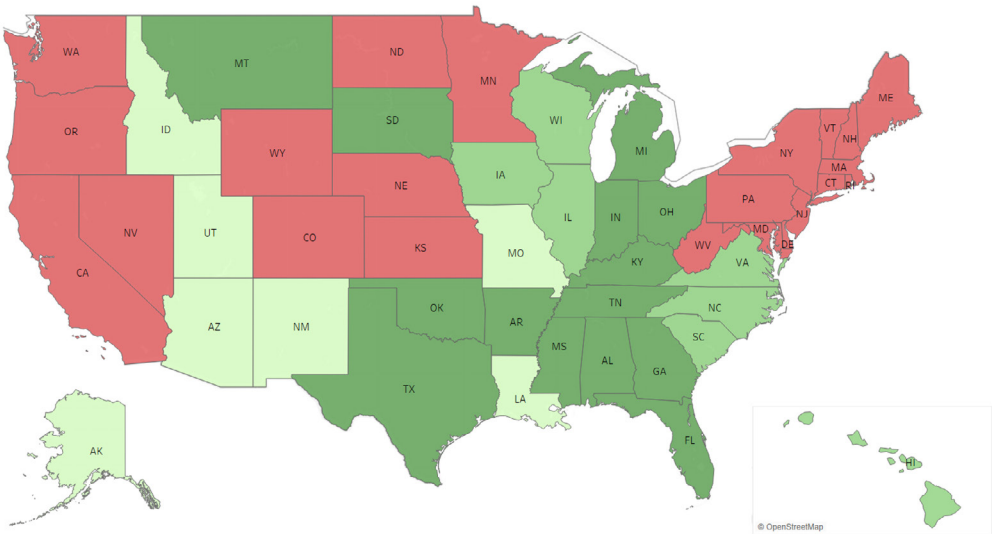


0.0%
YoY PHEV Market Share Change
(Apr 1, 2025 - Jun 30, 2025 vs Apr 2, 2024 - July 1, 2024)

Q2 PHEV Growth

YoY PHEV Retail Sales Volume Growth
Apr 1, 2025 - Jun 30, 2025 vs Apr 2, 2024 - July 1, 2024

+0.3%



- Decrease in sales
- Between 0% and 10% increase
- Between 10% and 20% increase
- More than a 20% increase

Q1

+16.5%

Jan 3, 2025 - Mar 31, 2025 vs.
Jan 3, 2024 - Apr 1, 2024

HEV Retail Sales Analysis

Data as of 6/30/2025

Q2 2025 U.S. Retail Sales

4/1/2025 - 6/30/2025



471,879
HEV Sales



14.3%
HEV Market Share



+41.5%
YoY HEV Sales Volume Growth
(Apr 1, 2025 - Jun 30, 2025 vs Apr 2, 2024 - July 1, 2024)



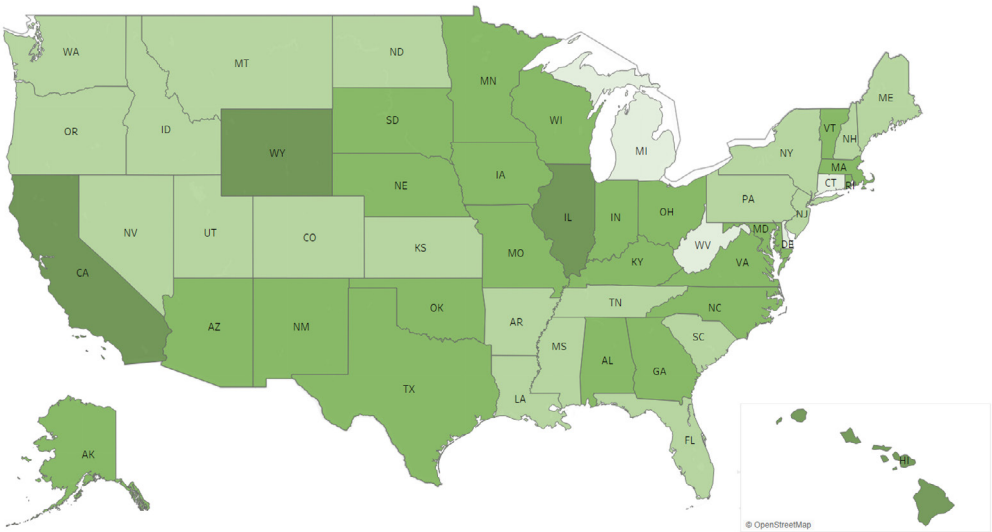
+4.0%
YoY HEV Market Share Change
(Apr 1, 2025 - Jun 30, 2025 vs Apr 2, 2024 - July 1, 2024)

Q2 HEV Growth

YoY HEV Retail Sales Volume Growth

Apr 1, 2025 - Jun 30, 2025 vs Apr 2, 2024 - July 1, 2024

+41.5%



- Less than 30% increase in sales
- Between 30% and 40% increase
- Between 40% and 50% increase
- More than a 50% increase

Q1

+44.1%

Jan 3, 2025 - Mar 31, 2025 vs.
Jan 3, 2024 - Apr 1, 2024

Top 5 States for Electrified Vehicle Sales (YTD)

Data as of 6/30/2025



1. California

Total EV Sales

Total retail sales*	774,834
EV sales	355,942
EV market share	45.9%
YoY sales volume growth	10.9%
YoY market share change	+4.3%

BEV

BEV sales	162,186
BEV market share	20.9%
YoY sales volume growth	-11.5%
YoY market share change	-2.8%

PHEV

PHEV sales	28,772
PHEV market share	3.7%
YoY sales volume growth	8.6%
YoY market share change	+0.3%

HEV

HEV sales	164,984
HEV market share	21.3%
YoY sales volume growth	48.1%
YoY market share change	+6.8%



2. Florida

Total EV Sales

Total retail sales*	594,010
EV sales	140,151
EV market share	23.6%
YoY sales volume growth	36.6%
YoY market share change	+10.3%

BEV

BEV sales	59,358
BEV market share	10.0%
YoY sales volume growth	25.2%
YoY market share change	+1.5%

PHEV

PHEV sales	9,591
PHEV market share	1.6%
YoY sales volume growth	47.8%
YoY market share change	+0.5%

HEV

HEV sales	71,202
HEV market share	12.0%
YoY sales volume growth	46.2%
YoY market share change	+3.2%



3. Texas

Total EV Sales

Total retail sales*	649,884
EV sales	120,869
EV market share	18.6%
YoY sales volume growth	30.3%
YoY market share change	+6.6%

BEV

BEV sales	42,427
BEV market share	6.5%
YoY sales volume growth	9.0%
YoY market share change	+0.1%

PHEV

PHEV sales	6,181
PHEV market share	1.0%
YoY sales volume growth	53.1%
YoY market share change	+0.3%

HEV

HEV sales	72,261
HEV market share	11.1%
YoY sales volume growth	45.0%
YoY market share change	+3.0%

*All powertrains

Top 5 States for Electrified Vehicle Sales (YTD)

Data as of 6/30/2025

4. New York

Total EV Sales

Total retail sales*	383,451
EV sales	75,506
EV market share	19.7%
YoY sales volume growth	10.3%
YoY market share change	+10.8%

BEV

BEV sales	23,712
BEV market share	6.2%
YoY sales volume growth	19.2%
YoY market share change	+0.4%

PHEV

PHEV sales	11,199
PHEV market share	2.9%
YoY growth in volume	-26.9%
YoY market share change	-1.0%

HEV

HEV sales	40,595
HEV market share	10.6%
YoY sales volume growth	33.2%
YoY market share change	+2.8%

5. Illinois

Total EV Sales

Total retail sales*	217,730
EV sales	50,862
EV market share	23.4%
YoY sales volume growth	37.1%
YoY market share change	+18.5%

BEV

BEV sales	16,852
BEV market share	7.7%
YoY sales volume growth	19.8%
YoY market share change	+0.9%

PHEV

PHEV sales	3,650
PHEV market share	1.7%
YoY growth in volume	37.6%
YoY market share change	+0.4%

HEV

HEV sales	30,360
HEV market share	13.9%
YoY sales volume growth	49.1%
YoY market share change	+4.0%

*All powertrains

Industry Reflections

Data as of 6/30/2025

Momentum for U.S. automotive industry sales weakened throughout the second quarter of 2025.

The early quarter sales bump seen in April and early May is now firmly in the rearview mirror. Industry retail sales rose just 2% year-over-year (YoY), with growth tapering off month by month — from a 13% YoY increase in April, followed by a modest 2% YoY increase in May and closing out with June's 7% YoY decline at the end of the quarter.

BEV sales posted their first quarterly decline since 2020.

BEV sales declined 8% YoY in Q2 2025, the first quarterly YoY drop since the onset of the COVID-19 pandemic, when BEV sales fell 37% in Q2 2020.

Growth in Q2 EV* sales was driven by HEVs.

Overall EV sales (HEV, PHEV and BEV) increased 17% in Q2, led by strong gains in HEV (+42% YoY). HEVs now command 14.3% of the market, with Toyota remaining the segment's leading brand.

HEV and PHEV sales nearly doubled BEV volumes.

Combined, HEVs and PHEV sales outpaced BEV sales by nearly 2 to 1, totaling 536,020 units compared to 269,457 BEVs sold during the quarter. Despite a 39% decline in Q2, Jeep remained the top-selling brand in the PHEV segment.

Tesla's market share continued to shrink.

Tesla sales volume declined 23% in Q2, and the brand's share of BEV sales fell to 46%, down eight percentage points from Q2 2024. Despite this, the Tesla Model Y held its position as the best-selling retail SUV in the country across all powertrains, with a 1.98% share of total retail sales for the quarter.

Despite softening BEV demand, several brands saw substantial growth.

Chevrolet (up 190%), Cadillac (up 56%), Nissan (up 32%) and Honda (up 344%) all recorded significant YoY gains in BEV sales over the quarter.

Illinois broke into the top five states for EV* sales.

The top five states for year-to-date EV* sales in Q2 were California, Florida, Texas, New York and Illinois. Illinois, which displaced Washington in the rankings, recorded sales volume gains across BEV, PHEV and HEV segments, with an overall 29.5% YoY increase in total EV* sales. This EV* sales growth in Illinois was mainly due to a growth in Chicago where we saw a 52% increase in gas/electric hybrids plus a 9% increase in electric vehicles.

Alaska, Michigan and Oklahoma saw the largest percentage gains in EV* sales.

In Michigan, BEV sales increased by 70%, despite the state still trailing the national average in BEV sales with a 6.9% market share. BEV sales in Michigan remain largely dominated by the "Detroit 3," whose domestic brands accounted for 72.6% of all BEVs sold during the quarter.

California's EV* mix shifted amid regulatory uncertainty.

Sales of California BEVs and PHEVs declined in Q2, with BEV sales down by 24.3% and PHEVs falling 1.1%. In contrast, HEV sales rose by 50.3%. As a result, combined EV* YTD sales share rose to 46% of all retail sales in California.

*"Electric" vehicles comprise all major electric powertrains (PHEV, BEV, HEV)

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