



URBAN SCIENCE®

Quarterly

# Electrified Vehicle Retail Sales Report

Q3 2025

Data as of 9/30/2025

# Report Overview

This electric vehicle (EV) retail sales report features Urban Science's proprietary 2025 sales insights through September 30, 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](https://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 9/30/2025

## Q3 2025 U.S. Retail Sales

7/1/2025 - 9/30/2025



3,341,216

Total Industry Sales (all powertrains)



918,894

Electrified Vehicle Sales



27.5%

Electrified Vehicle Market Share



26.9%

YoY EV Sales Volume Growth

(July 1, 2025 - Sept. 30, 2025 vs July 2, 2024 - Sept. 30 2024)



4.9%

YoY EV Market Share Change

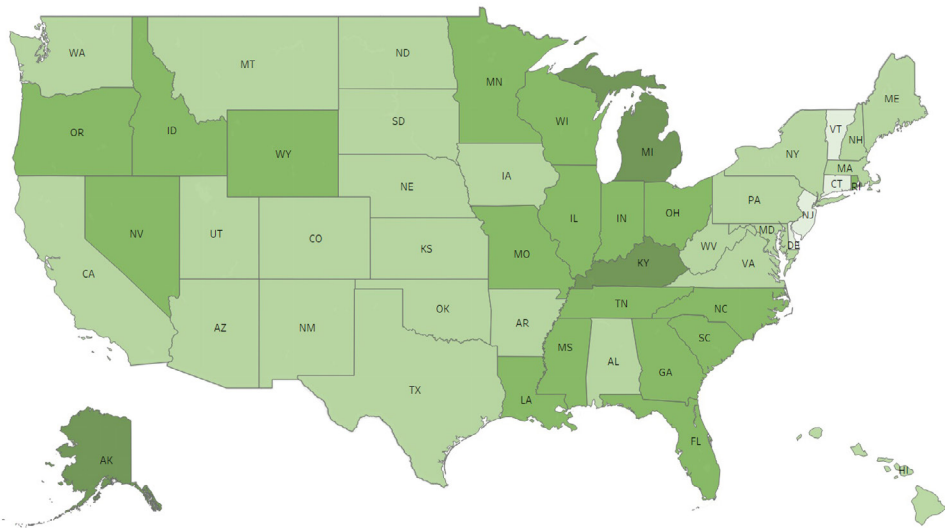
(July 1, 2025 - Sept. 30, 2025 vs July 2, 2024 - Sept. 30 2024)

## Q3 Growth

YoY EV Retail Sales Volume Growth

July 1, 2025 - Sept. 30, 2025 vs July 2, 2024 - Sept. 30, 2024

+26.9%



Q2

+16.5%

April 1, 2025 - June 30, 2025 vs.  
April 2, 2024 - July 1, 2024

# BEV Retail Sales Analysis

Data as of 9/30/2025

## Q3 2025 U.S. Retail Sales

7/1/2025 - 9/30/2025



394,699  
BEV Sales



11.8%  
BEV Market Share



29.5%  
YoY BEV Sales Volume Growth  
(July 1, 2025 - Sept. 30, 2025 vs July 2, 2024 - Sept. 30 2024)



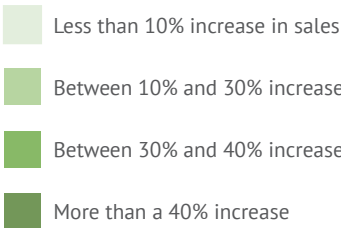
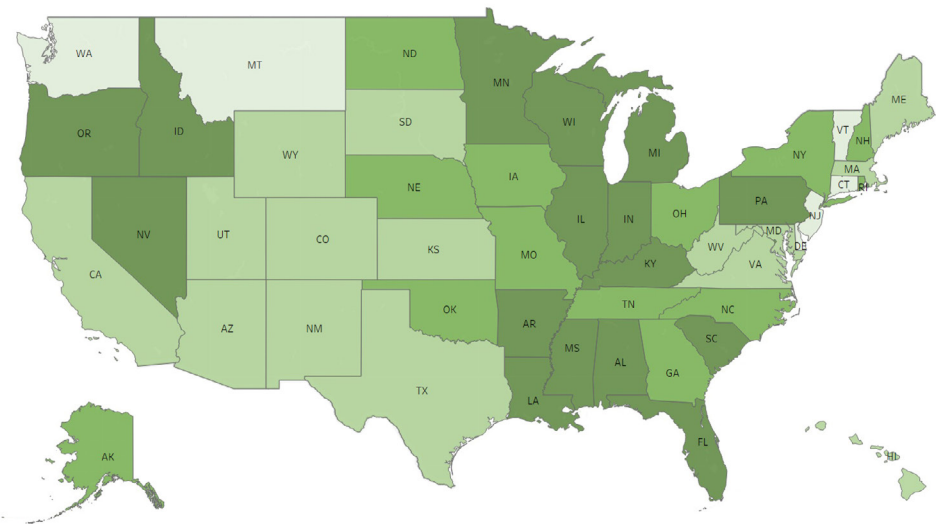
2.3%  
YoY BEV Market Share Change  
(July 1, 2025 - Sept. 30, 2025 vs July 2, 2024 - Sept. 30 2024)

## Q3 BEV Growth

YoY BEV Retail Sales Volume Growth

July 1, 2025 - Sept. 30, 2025 vs July 2, 2024 - Sept. 30, 2024

+29.5%



Q2

-8.3%

April 1, 2025 - June 30, 2025 vs  
April 2, 2024 - July 1, 2024

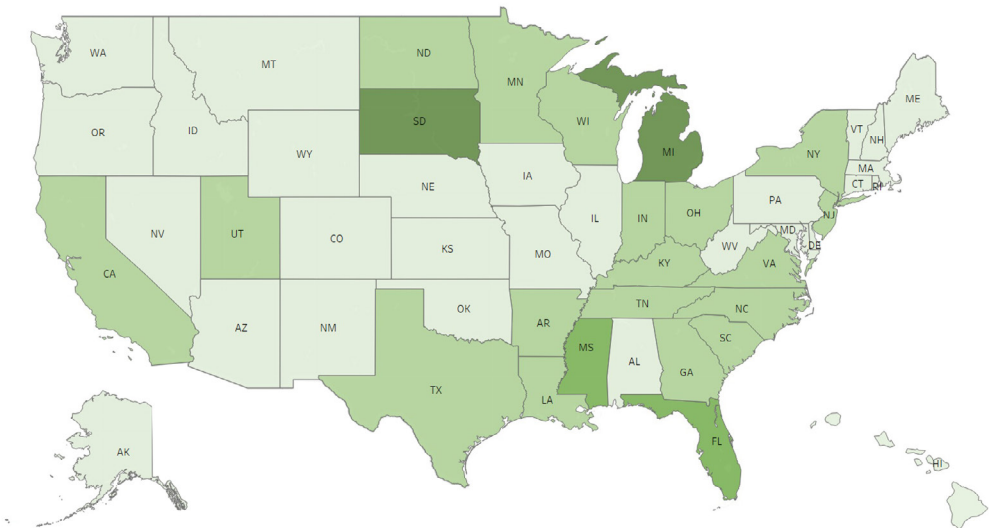
# PHEV Retail Sales Analysis

Data as of 9/30/2025

## Q3 PHEV Growth

YoY PHEV Retail Sales Volume Growth  
July 1, 2025 - Sept. 30, 2025 vs July 2, 2024 - Sept. 30, 2024

+14.5%



- Less than 10% increase in sales
- Between 10% and 30% increase
- Between 30% and 40% increase
- More than a 40% increase

Q2

+0.3%

April 1, 2025 - June 30, 2025 vs  
April 2, 2024 - July 1, 2024

## Q3 2025 U.S. Retail Sales

7/1/2025 - 9/30/2025



72,207  
PHEV Sales



2.2%  
PHEV Market Share



14.5%  
YoY PHEV Sales Volume Growth  
(July 1, 2025 - Sept. 30, 2025 vs July 2, 2024 - Sept. 30, 2024)



0.2%  
YoY PHEV Market Share Change  
(July 1, 2025 - Sept. 30, 2025 vs July 2, 2024 - Sept. 30, 2024)

# HEV Retail Sales Analysis

Data as of 9/30/2025

## Q3 2025 U.S. Retail Sales

7/1/2025 - 9/30/2025



451,988  
HEV Sales



13.5%  
HEV Market Share



26.8%  
YoY HEV Sales Volume Growth  
(July 1, 2025 - Sept. 30, 2025 vs July 2, 2024 - Sept. 30 2024)

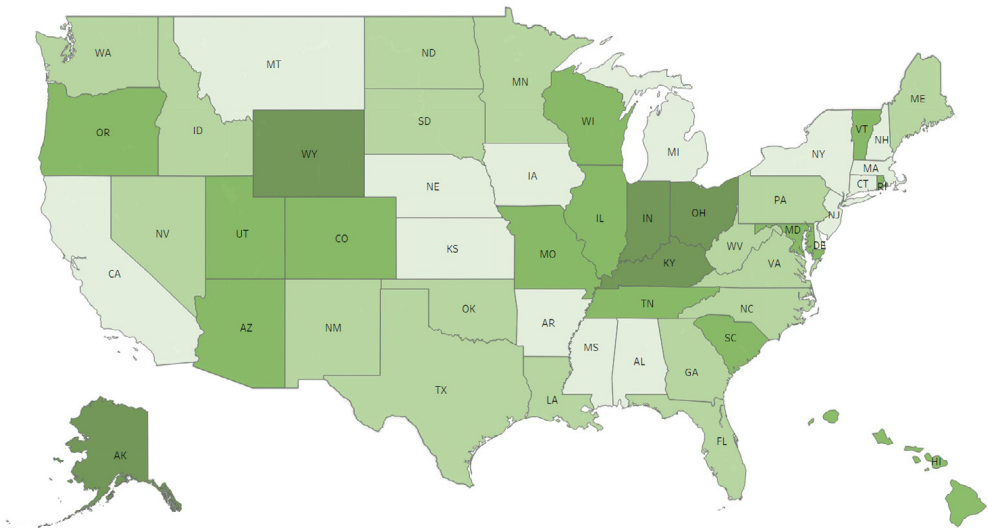


2.4%  
YoY HEV Market Share Change  
(July 1, 2025 - Sept. 30, 2025 vs July 2, 2024 - Sept. 30 2024)

## Q3 HEV Growth

YoY HEV Retail Sales Volume Growth  
July 1, 2025 - Sept. 30, 2025 vs July 2, 2024 - Sept. 30, 2024

+26.8%



- Less than 25% increase in sales
- Between 25% and 30% increase
- Between 30% and 35% increase
- More than a 35% increase

Q2

+41.5%

April 1, 2025 - June 30, 2025 vs  
April 2, 2024 - July 1, 2024

# Top 5 States for Electrified Vehicle Sales (YTD)

Data as of 9/30/2025



### Total EV Sales

Total retail sales*	1,198,037
EV sales	573,783
EV market share	47.9%
YoY sales volume growth	+16.4%
YoY market share change	+5.6 pp

### BEV

BEV sales	281,979
BEV market share	23.5%
YoY sales volume growth	+2.1%
YoY market share change	-0.1 pp

### PHEV

PHEV sales	47,081
PHEV market share	3.9%
YoY sales volume growth	+15.6%
YoY market share change	+0.4 pp

### HEV

HEV sales	244,723
HEV market share	20.4%
YoY sales volume growth	+38.9%
YoY market share change	+5.3 pp



### Total EV Sales

Total retail sales*	900,317
EV sales	224,292
EV market share	24.9%
YoY sales volume growth	+39.2%
YoY market share change	+11.1 pp

### BEV

BEV sales	101,390
BEV market share	11.3%
YoY sales volume growth	+38.8%
YoY market share change	+2.6 pp

### PHEV

PHEV sales	14,893
PHEV market share	1.7%
YoY sales volume growth	+42.8%
YoY market share change	+0.4 pp

### HEV

HEV sales	108,009
HEV market share	12%
YoY sales volume growth	+39.0%
YoY market share change	+2.7 pp



### Total EV Sales

Total retail sales*	984,389
EV sales	187,306
EV market share	19%
YoY sales volume growth	+28.3%
YoY market share change	+6.5 pp

### BEV

BEV sales	68,031
BEV market share	6.9%
YoY sales volume growth	+12.9%
YoY market share change	+0.4 pp

### PHEV

PHEV sales	9,322
PHEV market share	0.9%
YoY sales volume growth	+40.1%
YoY market share change	+0.2 pp

### HEV

HEV sales	109,953
HEV market share	11.2%
YoY sales volume growth	+39.1%
YoY market share change	+2.7 pp

\*All powertrains

# Top 5 States for Electrified Vehicle Sales (YTD)

Data as of 9/30/2025

## 4. New York



### Total EV Sales

Total retail sales*	581,279
EV sales	121,048
EV market share	20.8%
YoY sales volume growth	+15.6%
YoY market share change	+11.8 pp

### BEV

BEV sales	41,342
BEV market share	7.1%
YoY sales volume growth	+19.2%
YoY market share change	+1.1 pp

### PHEV

PHEV sales	18,261
PHEV market share	3.1%
YoY growth in volume	-14.5%
YoY market share change	-0.4 pp

### HEV

HEV sales	61,445
HEV market share	10.6%
YoY sales volume growth	+28.7%
YoY market share change	+2.6 pp

## 5. New Jersey



### Total EV Sales

Total retail sales*	323,093
EV sales	77,205
EV market share	23.9%
YoY sales volume growth	+6.7%
YoY market share change	+17.7 pp

### BEV

BEV sales	33,022
BEV market share	10.2%
YoY sales volume growth	-5.4%
YoY market share change	-0.1 pp

### PHEV

PHEV sales	9,250
PHEV market share	2.9%
YoY growth in volume	-10.0%
YoY market share change	-0.2 pp

### HEV

HEV sales	34,933
HEV market share	10.8%
YoY sales volume growth	+28.6%
YoY market share change	+2.8 pp

\*All powertrains



# Industry Reflections

Data as of 9/30/2025

## **Retail automotive sales continued upward momentum through Q3.**

Total U.S. retail sales rose 4% YoY in Q3, bringing YTD growth to 4% through September. Sales have consistently outperformed 2025 forecasts that anticipated weaker demand due to tariffs, policy pressures and other factors through the first nine months of the year.

## **EV sales surged to record-high market share.**

EV sales grew 27% YoY in Q3, driving total EV retail market share to a record 27.5% — a five-percentage-point increase over Q3 2024.

## **BEV sales spiked ahead of the federal tax credit phase-out.**

BEV sales rose 29% YoY in Q3, fueled by a surge of purchases before the federal tax rebate program expired. BEV market share increased 2.3 percentage points to 11.8% of total retail sales.

## **HEV sales sustained continued growth.**

HEV sales rose 26% YoY in Q3, continuing their strong upward trajectory. HEV market share reached 13.5%, marking a 2.4-percentage-point increase compared to Q3 2024.

## **PHEV growth remained steady but modest.**

PHEV sales grew 14% YoY in Q3 2025. While growth continued, PHEVs remain a smaller segment, representing 2.2% of total retail market share — a gain of 0.2 percentage points compared to the same time period last year.

## **California EV sales topped 50% share for the first time.**

While total retail sales in California increased 6% YoY in Q3, EV sales rose 23% during the same period. For the first time, more than half (51%) of all vehicles sold in the state featured electric powertrains. BEVs accounted for 27.4% of retail sales; HEVs made up 19.1% and PHEVs accounted for 4.4%.

## **Florida posted the highest EV growth among leading states.**

Florida remained the second-largest EV sales market in the U.S. in Q3 2025. Total retail sales were up 7% YoY, while EV sales in the Sunshine State jumped 39% YoY during the same time period; this is the largest increase in the top five states for Q3 EV retail sales volume. This growth was primarily driven by a 52% surge in BEV sales.

## **Texas recorded balanced EV growth across all segments.**

Texas maintained its position as the third-ranked state for EV sales, with EV retail volumes rising 25% YoY in Q3. Each electric segment — BEV, PHEV, and HEV — saw growth exceeding 20%, highlighting broad-based consumer adoption across the state.

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