



URBAN SCIENCE®

Quarterly **Electrified Vehicle Retail Sales Report**

Q4 2025
Data as of 1/2/2026

Report Overview

This electric vehicle (EV) retail sales report features Urban Science's proprietary Q4 2025 sales insights through January 2, 2026, 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 GLOBAL OFFICES	EMPLOYING EXPERTS	SERVING COUNTRIES	PROVIDING SOLUTIONS TO DEALERSHIPS	WORKING WITH OEMs GLOBALLY
18	750+	100+	20K+	50+

* 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 1/2/2026

Q4 2025 U.S. Retail Sales

10/1/2025 - 1/2/2026



3,170,076

Total Industry Sales (all powertrains)



684,098

Electrified Vehicle Sales



21.6%

Electrified Vehicle Market Share



-19.2%

YoY EV Sales Volume Growth
(Oct. 1, 2025 - Jan. 2, 2026 vs Oct. 1, 2024 - Jan. 2, 2025)



-3.1%

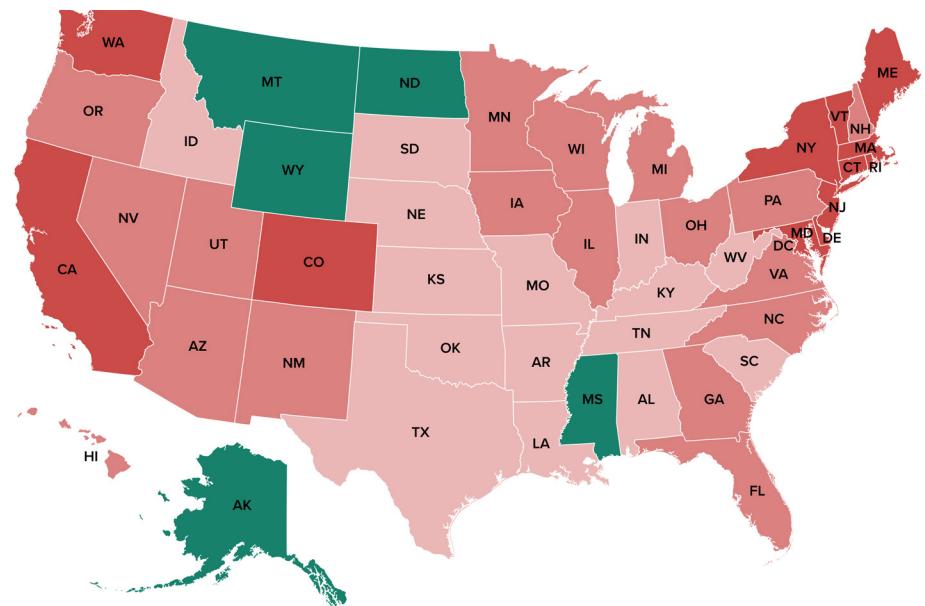
YoY EV Market Share Change
(Oct. 1, 2025 - Jan. 2, 2026 vs Oct. 1, 2024 - Jan. 2, 2025)

Q4 Growth

YoY EV Retail Sales Volume Growth

Oct. 1, 2025 - Jan. 2, 2026 vs Oct. 1, 2024 - Jan. 2, 2025

-19.2%



- More than 20% decrease in sales
- Between 20% and 10% decrease
- Between 10% and 0% decrease
- Increase in sales

Q3

+26.9%

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

BEV Retail Sales Analysis

Data as of 1/2/2026

Q4 2025 U.S. Retail Sales

10/1/2025 - 1/2/2026



182,787
BEV Sales



5.8%
BEV Market Share



-44.9%
YoY BEV Sales Volume Growth
(Oct. 1, 2025 - Jan. 2, 2026 vs Oct. 1, 2024 - Jan. 2, 2025)



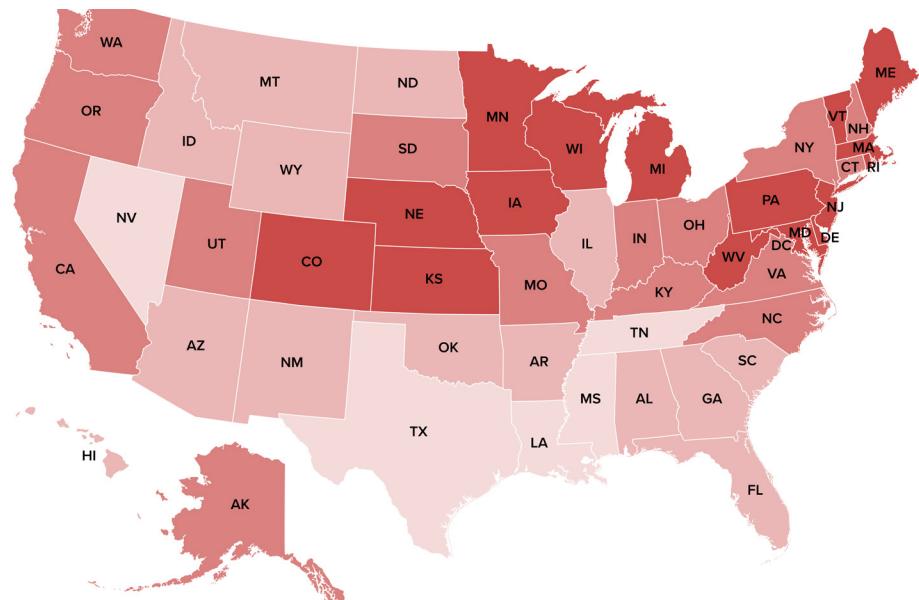
-3.9%
YoY BEV Market Share Change
(Oct. 1, 2025 - Jan. 2, 2026 vs Oct. 1, 2024 - Jan. 2, 2025)

Q4 BEV Growth

YoY BEV Retail Sales Volume Growth

Oct. 1, 2025 - Jan. 2, 2026 vs Oct. 1, 2024 - Jan. 2, 2025

-44.9%



- Less than 30% decrease
- Between 40% and 30% decrease
- Between 50% and 40% decrease
- More than a 50% decrease

Q3

+29.5%

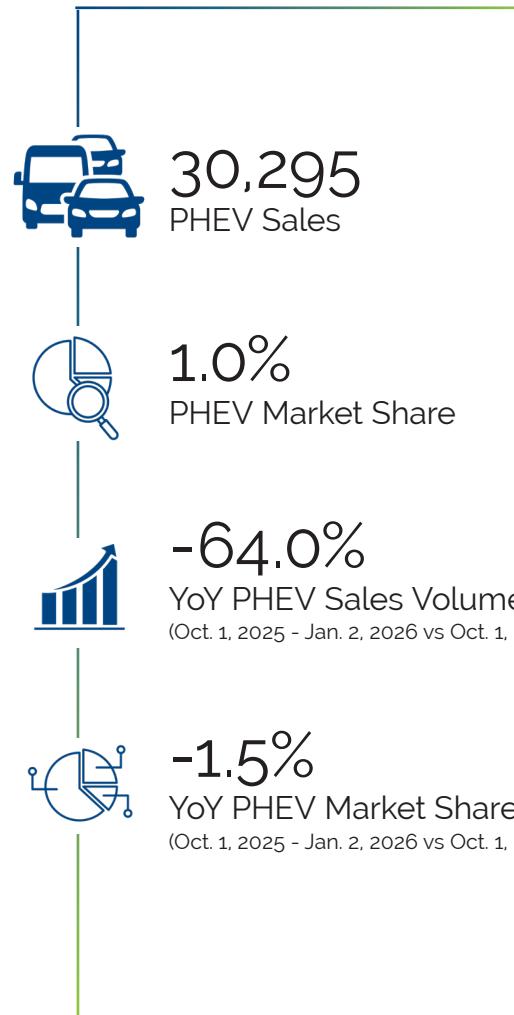
July 1, 2025 - Sept. 30, 2025 vs
July 2, 2024 - Sept. 30, 2024

PHEV Retail Sales Analysis

Data as of 1/2/2026

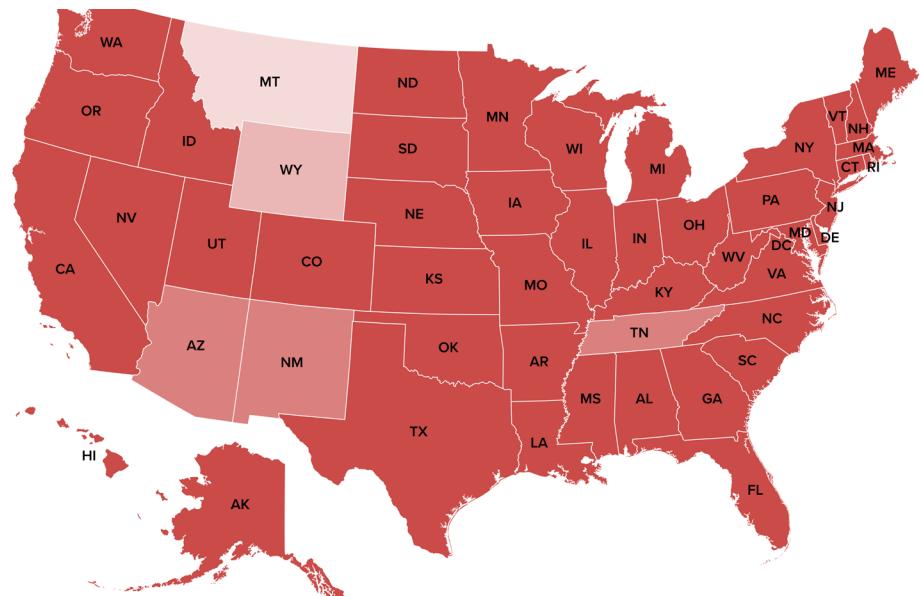
Q4 2025 U.S. Retail Sales

10/1/2025 - 1/2/2026



Q4 PHEV Growth
YoY PHEV Retail Sales Volume Growth
Oct. 1, 2025 - Jan. 2, 2026 vs Oct. 1, 2024 - Jan. 2, 2025

-64.0%



Q3
+14.5%

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

HEV Retail Sales Analysis

Data as of 1/2/2026

Q4 2025 U.S. Retail Sales

10/1/2025 - 1/2/2026



471,016
HEV Sales



14.9%
HEV Market Share



9.2%
YoY HEV Sales Volume Growth
(Oct. 1, 2025 - Jan. 2, 2026 vs Oct. 1, 2024 - Jan. 2, 2025)



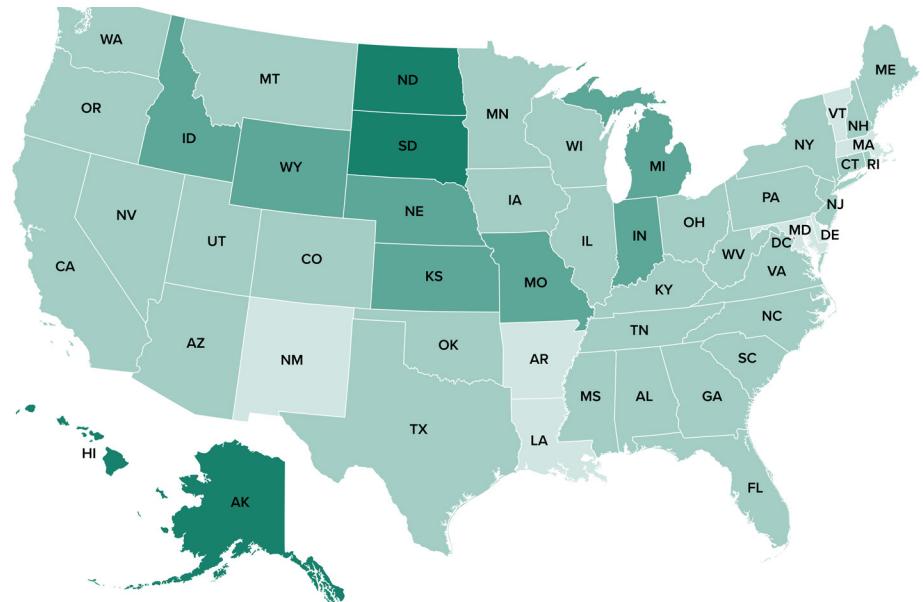
2.3%
YoY HEV Market Share Change
(Oct. 1, 2025 - Jan. 2, 2026 vs Oct. 1, 2024 - Jan. 2, 2025)

Q4 HEV Growth

YoY HEV Retail Sales Volume Growth

Oct. 1, 2025 - Jan. 2, 2026 vs Oct. 1, 2024 - Jan. 2, 2025

+9.2%



- Less than 5% increase in sales
- Between 5% and 15% increase
- Between 15% and 25% increase
- More than a 25% increase

Q3
+26.8%

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

Top 5 States for Electrified Vehicle Sales (YTD)

Data as of 1/2/2026



1. California

Total EV Sales

Total retail sales*	1,573,349
EV sales	728,051
EV market share	46.3%
YoY sales volume growth	+5.8%
YoY market share change	+2.8 pp

BEV

BEV sales	343,999
BEV market share	21.9%
YoY sales volume growth	-8.4%
YoY market share change	-1.9 pp

PHEV

PHEV sales	54,002
PHEV market share	3.4%
YoY sales volume growth	-6.7%
YoY market share change	-0.2 pp

HEV

HEV sales	330,050
HEV market share	21.0%
YoY sales volume growth	+29.8%
YoY market share change	+4.9 pp



2. Florida

Total EV Sales

Total retail sales*	1,198,816
EV sales	285,192
EV market share	23.8%
YoY sales volume growth	+22.2%
YoY market share change	+9.1 pp

BEV

BEV sales	122,558
BEV market share	10.2%
YoY sales volume growth	+17.5%
YoY market share change	+1.2 pp

PHEV

PHEV sales	17,349
PHEV market share	1.4%
YoY sales volume growth	+7.5%
YoY market share change	+0.1 pp

HEV

HEV sales	145,285
HEV market share	12.1%
YoY sales volume growth	+28.7%
YoY market share change	+2.4 pp



3. Texas

Total EV Sales

Total retail sales*	1,318,391
EV sales	247,102
EV market share	18.7%
YoY sales volume growth	+20.3%
YoY market share change	+5.8 pp

BEV

BEV sales	88,694
BEV market share	6.7%
YoY sales volume growth	+7.1%
YoY market share change	+0.2 pp

PHEV

PHEV sales	11,217
PHEV market share	0.9%
YoY sales volume growth	+6.9%
YoY market share change	0.0 pp

HEV

HEV sales	147,191
HEV market share	11.2%
YoY sales volume growth	+31.3%
YoY market share change	+2.3 pp

*All powertrains

Top 5 States for Electrified Vehicle Sales (YTD)

Data as of 1/2/2026

4. New York



Total EV Sales

Total retail sales*	760,960
EV sales	153,272
EV market share	20.1%
YoY sales volume growth	+4.5%
YoY market share change	+10.9 pp

BEV

BEV sales	50,480
BEV market share	6.6%
YoY sales volume growth	+19.2%
YoY market share change	+0.4 pp

PHEV

PHEV sales	20,099
PHEV market share	2.6%
YoY growth in volume	-31.9%
YoY market share change	-1.1 pp

HEV

HEV sales	82,693
HEV market share	10.9%
YoY sales volume growth	+23.0%
YoY market share change	+2.4 pp

5. Illinois



Total EV Sales

Total retail sales*	430,367
EV sales	101,445
EV market share	23.6%
YoY sales volume growth	+21.3%
YoY market share change	+18.3 pp

BEV

BEV sales	33,175
BEV market share	7.7%
YoY sales volume growth	+10.4%
YoY market share change	+0.7 pp

PHEV

PHEV sales	6,347
PHEV market share	1.5%
YoY growth in volume	-5.5%
YoY market share change	-0.1 pp

HEV

HEV sales	61,923
HEV market share	14.4%
YoY sales volume growth	+32.1%
YoY market share change	+3.4 pp

*All powertrains

Industry Reflections

Data as of 1/2/2026

Retail Sales Softened in Q4 but Beat Tariff-Driven Expectations

Overall U.S. retail sales declined 8% YoY in Q4 2025, creating a soft close to the year. Despite this slowdown, full-year retail sales finished up 1.3% over 2024, solidly outperforming forecasts that anticipated a major industry contraction following U.S. policy changes and the uncertainty that accompanied them.

EV Segment Decline Weighed on Q4 Performance

Despite EVs accounting for 25% of U.S. retail sales in 2025, Q4 retail sales performance was weighed down primarily by a sharp decline in EV segment sales, which fell 19.2% YoY during the quarter.

BEV and PHEV Sales Declined Sharply Following Incentive-Driven Pull-Ahead Sales

BEV sales dropped 45% YoY in Q4, while PHEV sales declined 64%. The termination of the IRA federal rebate program accelerated EV purchases into Q3, dampening near-term demand and expectations across the electric vehicle segment. On a full-year basis, BEV sales slipped just 1%, maintaining a 9% share of total retail sales. PHEV sales fell 12.9% for the year, reducing segment share to 1.8%.

HEV Sales Continued to Outperform Other EV Subsegments

HEV sales remained a relative bright spot in Q4, rising 9.2% YoY despite broader EV sales dips. For full-year 2025, hybrid sales increased 28.5% compared to 2024 and accounted for 14% of total U.S. retail industry share.

California Remained the U.S. EV Sales Leader Despite Q4 Declines

The Golden State continued to lead the nation in EV sales across BEV, PHEV and HEV subsegments, though overall EV sales declined 26.2% YoY in Q4. BEV sales fell 48% and PHEV sales dropped 59% as demand was pulled into Q3, while HEV sales grew 8.8% YoY. EVs represented 39% of California retail sales in Q4 and 46% of total sales for the full year.

Florida Outperformed National EV Trends

Florida, the nation's second-largest EV market by sales volume, recorded a 16% YoY decline in EV sales in Q4 – less dramatic than the national average. BEV sales declined 34% and PHEV sales fell 58%, while HEV sales continued to grow, up 5.8% YoY. EVs accounted for 20% of the Sunshine State's total retail sales during the fourth quarter.

Texas Demonstrated Broad-Based EV Resilience

Texas ranked third nationally for EV sales and posted one of the strongest Q4 performances, with EV sales down just 2.8% YoY. BEV sales declined 17%, PHEV sales were reduced by roughly half and HEV sales rose 12% YoY. The EV segment captured 17% of retail sales in the Lone Star State in the fourth quarter.

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