

Report Overview

This electric vehicle (EV) retail sales report features Urban Science's proprietary Q1 2026 sales insights through March 31, 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 17 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.

* 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 3/31/2026

Q1 2026 U.S. Retail Sales

1/3/2026 - 3/31/2026



2,753,980

Total Industry Sales (all powertrains)



625,566

Electrified Vehicle Sales



22.7%

Electrified Vehicle Market Share



-17.1%

YoY EV Sales Volume Growth

(Jan. 3, 2026 - Mar. 31, 2026 vs Jan. 3, 2025 - Mar. 31, 2025)



-2.0 pp

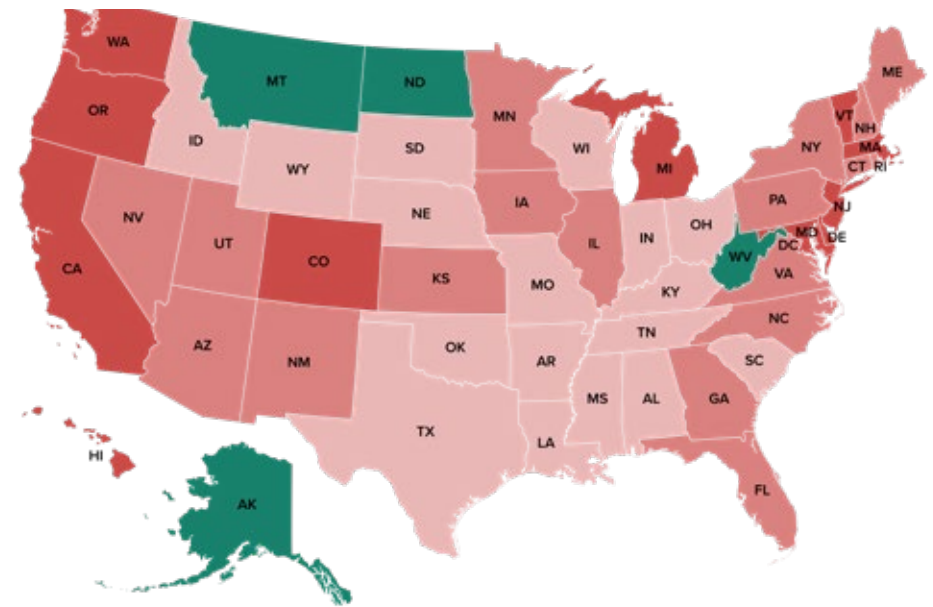
YoY EV Market Share Change

(Jan. 3, 2026 - Mar. 31, 2026 vs Jan. 3, 2025 - Mar. 31, 2025)

Q1 EV Growth

YoY EV Retail Sales Volume Growth
Jan. 3, 2026 - Mar. 31, 2026 vs Jan. 3, 2025 - Mar. 31, 2025

-17.1%



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

Q4

-19.2%

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

Note: March 2025 sales were boosted by tariff pre-buying activity, which led to the notable YoY decline.

BEV Retail Sales Analysis

Data as of 3/31/2026

Q1 2026 U.S. Retail Sales

1/3/2026 - 3/31/2026



168,835
BEV Sales



6.1%
BEV Market Share



-39.8%
YoY BEV Sales Volume Growth
(Jan. 3, 2026 - Mar. 31, 2026 vs Jan. 3, 2025 - Mar. 31, 2025)

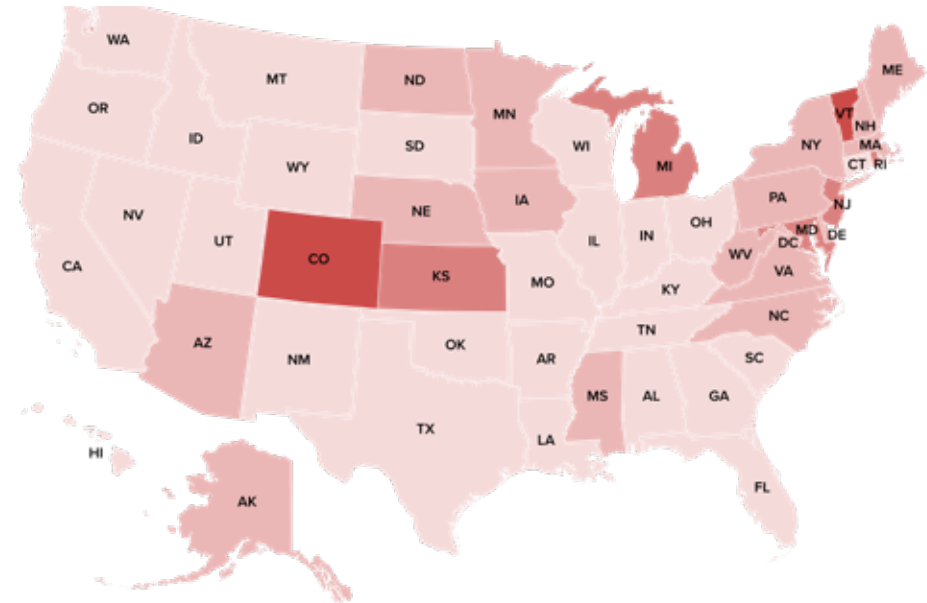


-3.0 pp
YoY BEV Market Share Change
(Jan. 3, 2026 - Mar. 31, 2026 vs Jan. 3, 2025 - Mar. 31, 2025)

Q1 BEV Growth

YoY BEV Retail Sales Volume Growth
Jan. 3, 2026 - Mar. 31, 2026 vs Jan. 3, 2025 - Mar. 31, 2025

-39.8%



- Less than 40% decrease
- Between 50% and 40% decrease
- Between 60% and 50% decrease
- More than a 60% decrease

Q4

-44.9%

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

PHEV Retail Sales Analysis

Data as of 3/31/2026

Q1 2026 U.S. Retail Sales

1/3/2026 - 3/31/2026



28,610
PHEV Sales



1.0%
PHEV Market Share



-56.7%
YoY PHEV Sales Volume Growth
(Jan. 3, 2026 - Mar. 31, 2026 vs Jan. 3, 2025 - Mar. 31, 2025)

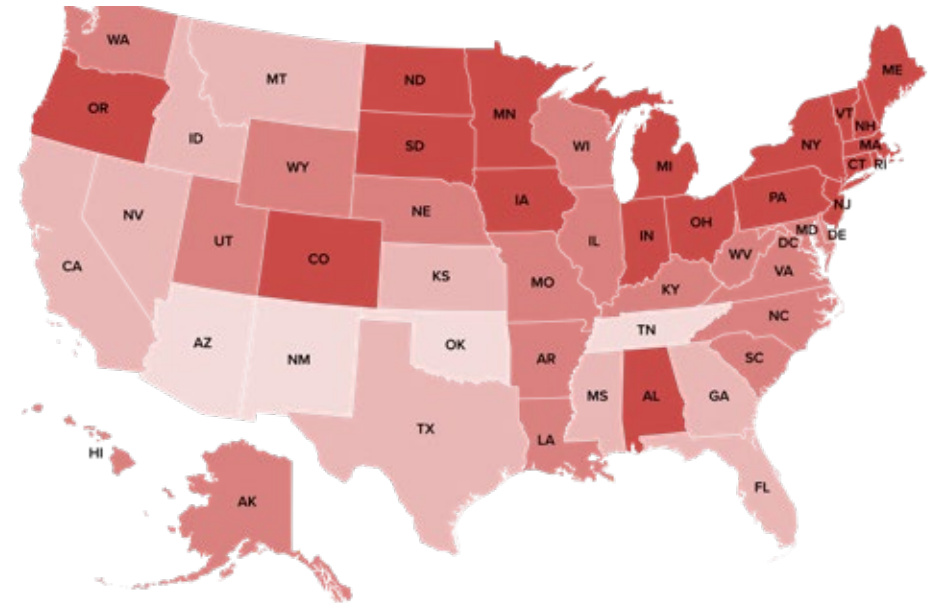


-1.1 pp
YoY PHEV Market Share Change
(Jan. 3, 2026 - Mar. 31, 2026 vs Jan. 3, 2025 - Mar. 31, 2025)

Q1 PHEV Growth

YoY PHEV Retail Sales Volume Growth
Jan. 3, 2026 - Mar. 31, 2026 vs Jan. 3, 2025 - Mar. 31, 2025

-56.7%



- Less than 40% decrease
- Between 50% and 40% decrease
- Between 60% and 50% decrease
- More than a 60% decrease

Q4

-64.0%

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

HEV Retail Sales Analysis

Data as of 3/31/2026

Q1 2026 U.S. Retail Sales

1/3/2026 - 3/31/2026



428,121
HEV Sales



15.5%
HEV Market Share



5.0%
YoY HEV Sales Volume Growth
(Jan. 3, 2026 - Mar. 31, 2026 vs Jan. 3, 2025 - Mar. 31, 2025)

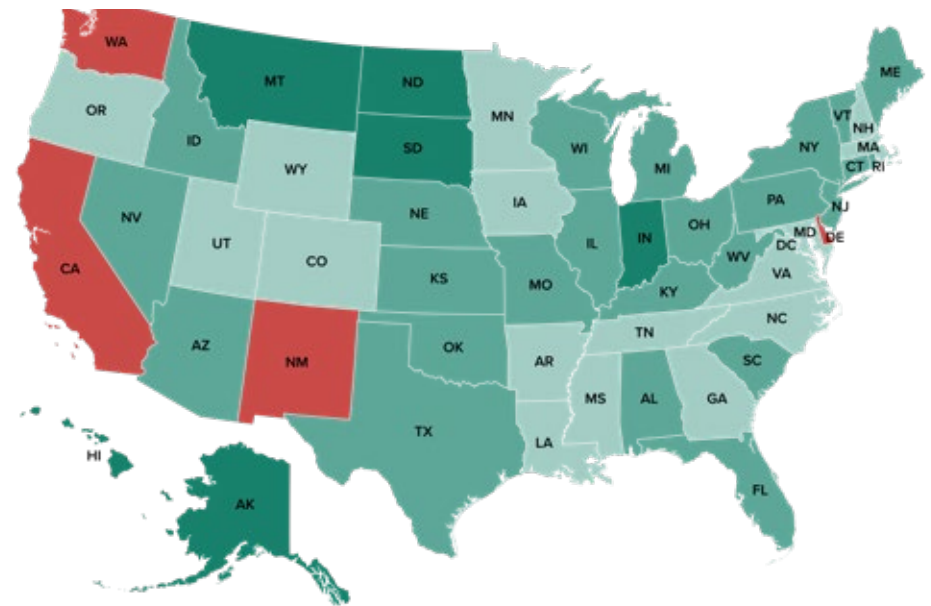


2.2 pp
YoY HEV Market Share Change
(Jan. 3, 2026 - Mar. 31, 2026 vs Jan. 3, 2025 - Mar. 31, 2025)

Q4 HEV Growth

YoY HEV Retail Sales Volume Growth
Jan. 3, 2026 - Mar. 31, 2026 vs Jan. 3, 2025 - Mar. 31, 2025

+5.0%



- Decrease in Sales
- Between 0% and 5% increase
- Between 5% and 15% increase
- More than a 15% increase

Q4

+9.2%

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

Top 5 States for Electrified Vehicle Sales (YTD)

Data as of 3/31/2026

1. California



Total EV Sales

Total retail sales*	333,951
EV sales	136,019
EV market share	40.7%
YoY sales volume growth	-22.0%
YoY market share change	-5.2 pp

BEV

BEV sales	52,882
BEV market share	15.8%
YoY sales volume growth	-36.2%
YoY market share change	-6.0 pp

PHEV

PHEV sales	7,672
PHEV market share	2.3%
YoY sales volume growth	-48.8%
YoY market share change	-1.6 pp

HEV

HEV sales	75,465
HEV market share	22.6%
YoY sales volume growth	-1.2%
YoY market share change	+2.5 pp

2. Florida



Total EV Sales

Total retail sales*	265,810
EV sales	58,168
EV market share	21.9%
YoY sales volume growth	-15.9%
YoY market share change	+3.7 pp

BEV

BEV sales	19,274
BEV market share	7.3%
YoY sales volume growth	-36.3%
YoY market share change	-3.3 pp

PHEV

PHEV sales	2,608
PHEV market share	1.0%
YoY sales volume growth	-46.0%
YoY market share change	-0.7 pp

HEV

HEV sales	36,286
HEV market share	13.7%
YoY sales volume growth	+6.6%
YoY market share change	+1.8 pp

3. Texas



Total EV Sales

Total retail sales*	284,556
EV sales	52,699
EV market share	18.5%
YoY sales volume growth	-9.9%
YoY market share change	+3.1 pp

BEV

BEV sales	15,343
BEV market share	5.4%
YoY sales volume growth	-31.4%
YoY market share change	-1.9 pp

PHEV

PHEV sales	1,800
PHEV market share	0.6%
YoY sales volume growth	-43.1%
YoY market share change	-0.4 pp

HEV

HEV sales	35,556
HEV market share	12.5%
YoY sales volume growth	+7.9%
YoY market share change	+1.7 pp

*All powertrains

Top 5 States for Electrified Vehicle Sales (YTD)

Data as of 3/31/2026

4. New York

Total EV Sales

Total retail sales*	166,548
EV sales	29,632
EV market share	17.8%
YoY sales volume growth	-18.3%
YoY market share change	+8.2 pp

BEV

BEV sales	6,290
BEV market share	3.8%
YoY sales volume growth	+19.2%
YoY market share change	-2.5 pp

PHEV

PHEV sales	1,901
PHEV market share	1.1%
YoY growth in volume	-67.1%
YoY market share change	-2.0 pp

HEV

HEV sales	21,441
HEV market share	12.9%
YoY sales volume growth	+13.7%
YoY market share change	+2.7 pp

5. Illinois

Total EV Sales

Total retail sales*	91,722
EV sales	20,662
EV market share	22.5%
YoY sales volume growth	-13.7%
YoY market share change	+16.2 pp

BEV

BEV sales	5,001
BEV market share	5.5%
YoY sales volume growth	-39.7%
YoY market share change	-2.6 pp

PHEV

PHEV sales	824
PHEV market share	0.9%
YoY growth in volume	-55.1%
YoY market share change	-0.9 pp

HEV

HEV sales	14,837
HEV market share	16.2%
YoY sales volume growth	+7.5%
YoY market share change	+2.9 pp

*All powertrains

Industry Reflections

Data as of 3/31/2026

Market Shifts and EV Sales Declines Were Driven by Complex Factors

U.S. automotive industry sales declined 9.8% year over year in Q1, with EV sales across all powertrain types down 17.1%. While these declines appear significant, they largely reflect an uneven comparison rather than a fundamental shift in consumer sentiment.

Sales in March 2025 were boosted by pre-buying activity ahead of tariffs and other policy dynamics, pulling demand forward and boosting Q1 2025 volumes. Colder-than-average winter weather, rising transaction costs and higher fuel prices further pressured demand in Q1 2026. Together, these factors are the primary drivers behind the sharper year-over-year decline, signaling a period of market adjustment rather than a broader retreat.

Hybrids Emerge as a Stability Point

Among the three EV subsegments, HEVs were the only one to post positive year-over-year growth, increasing 5% with 407,612 units sold in Q1. In contrast, BEV sales declined 39.8% year over year to 168,835 units, while PHEV sales fell 56.7% to 28,610 units sold. This divergence highlights a clear shift in consumer preferences toward electrification options that balance fuel efficiency with price sensitivity and infrastructure confidence.

BEV Decline Shows Signs of Stabilization

While BEV sales remain well below levels achieved during the Inflation Reduction Act rebate period, the magnitude of the year-over-year decline has continued to narrow since the rebate expired, signaling early signs of stabilization.

In Q4 2025, BEV sales were down 45% year over year, a contraction that improved to 40% in Q1 2026. Momentum strengthened further as the quarter progressed, with March BEV sales only 34% lower than the prior March. Although demand has yet to fully recover, the improving trajectory suggests BEV sales pressure may be easing as the market adjusts to new incentive structures, pricing dynamics and vehicle options.

EV Leadership Holds Firm—Even as Shares Decline

The top five states for EV sales remained unchanged from Q4 2025, underscoring the persistence of core EV markets, even amid broader sales declines. California once again led the pack with 40.7% EV market share (down from 46% in Q1 2025), followed by Florida at 18.2% (down from 21.9%), Texas at 15.4% (down from 18.5%), New York at 9.5% (down from 17.8%) and Illinois at 6.3% (down from 22.5%).

Practical Vehicle Selections Continue to Pace EV Demand

Consumer preferences remain firmly anchored in utility-driven vehicle types, with EV demand concentrated in familiar and versatile segments. Compact SUVs led all EV segments with 168,584 units sold, representing a 6.1% share, followed by luxury midsize SUVs with 93,020 units sold, or a 3.4% share. Midsize cars accounted for 74,675 units sold (2.7% share), while midsize SUVs recorded 56,770 units sold (2.1% share). Compact cars rounded out the top five with 40,795 units sold, or a 1.5% share. Together, these segments show familiarity and practicality continue to guide EV purchasing decisions, especially during periods of economic caution.

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