



Quarterly

Electrified Vehicle Retail Sales Report

Q1 2025
Data as of 3/31/2025



Report Overview

This electric vehicle (EV) retail sales report features Urban Science's proprietary 2025 sales insights through March 31, 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.



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

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

Retail Sales Overview

Data as of 3/31/2025

Q1 2025 U.S. Retail Sales

1/3/2025 - 3/31/2025



3,076,573
Total Industry Sales (all powertrains)



750,698
Electrified Vehicle Sales



24.4%
Electrified Vehicle Market Share



29.6%
YoY EV Growth in Sales Volume
(Jan 3, 2025 - Mar 31, 2025 vs. Jan 3, 2024 - Apr 1, 2024)

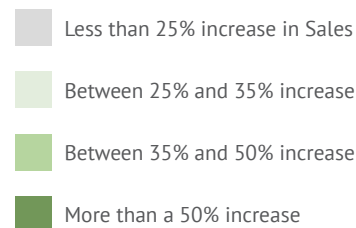
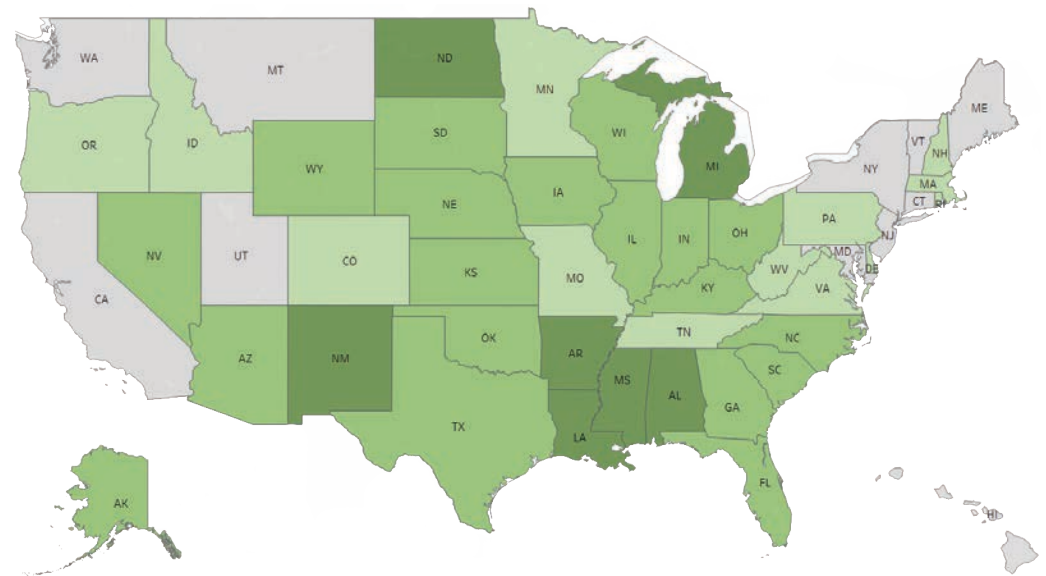


+4.5 ppt
YoY EV Market Share Change
(Jan 3, 2025 - Mar 31, 2025 vs. Jan 3, 2024 - Apr 1, 2024)

Q1 Growth

YoY EV Retail Sales Volume Growth
Jan 3, 2025 - Mar 31, 2025 vs. Jan 3, 2024 - Apr 1, 2024

+29.6%



Q4

+33.9%

Oct 1 2024 - Jan 2 2025 vs.
Oct 3 2023 - Jan 3, 2024

PHEV Retail Sales Analysis

Data as of 3/31/2025

Q1 2025 U.S. Retail Sales

1/3/2025 - 3/31/2025



66,662
PHEV Sales



2.2%
PHEV Market Share



16.5%
YoY PHEV Sales Volume Growth
(Jan 3, 2025 - Mar 31, 2025 vs. Jan 3, 2024 Apr 1, 2024)



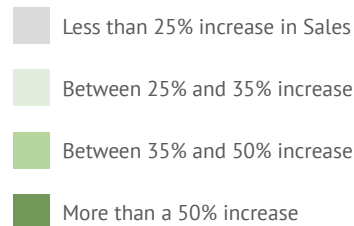
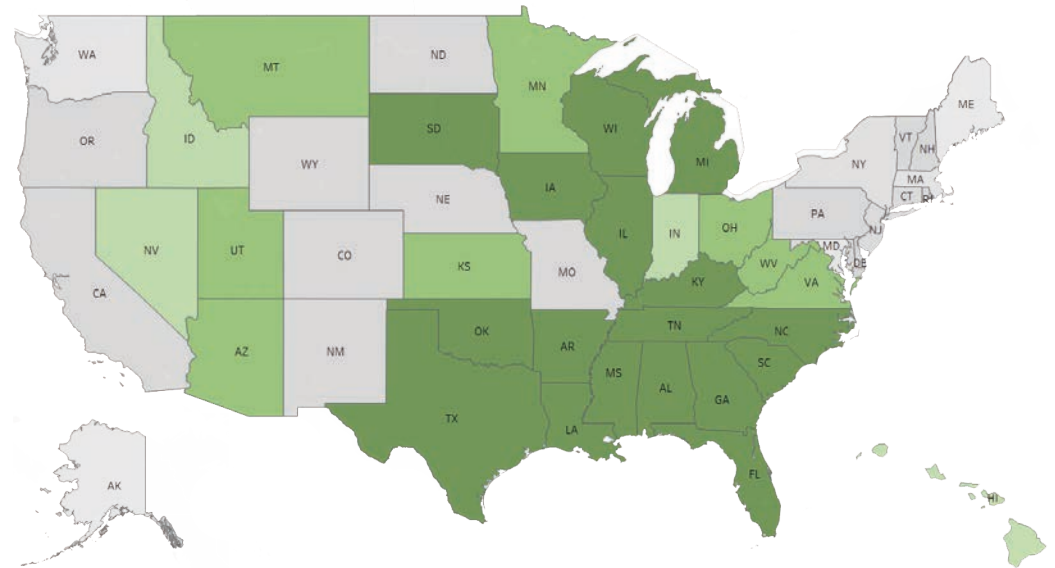
+0.2 ppt
YoY PHEV Market Share Change
(Jan 3, 2025 - Mar 31, 2025 vs. Jan 3, 2024 Apr 1, 2024)

Q1 PHEV Growth

YoY PHEV Retail Sales Volume Growth

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

+16.5%



Q4

+35.2%

Oct 1 2024 - Jan 2 2025 vs.
Oct 3 2023 - Jan 3, 2024

HEV Retail Sales Analysis

Data as of 3/31/2025

Q1 HEV Growth

YoY HEV Retail Sales Volume Growth

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

+44.1%

Q1 2025 U.S. Retail Sales

1/3/2025 - 3/31/2025



410,555
HEV Sales



13.3%
HEV Market Share



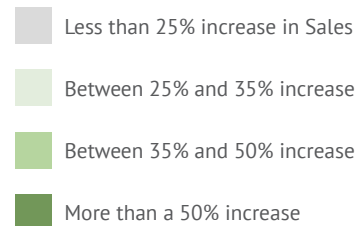
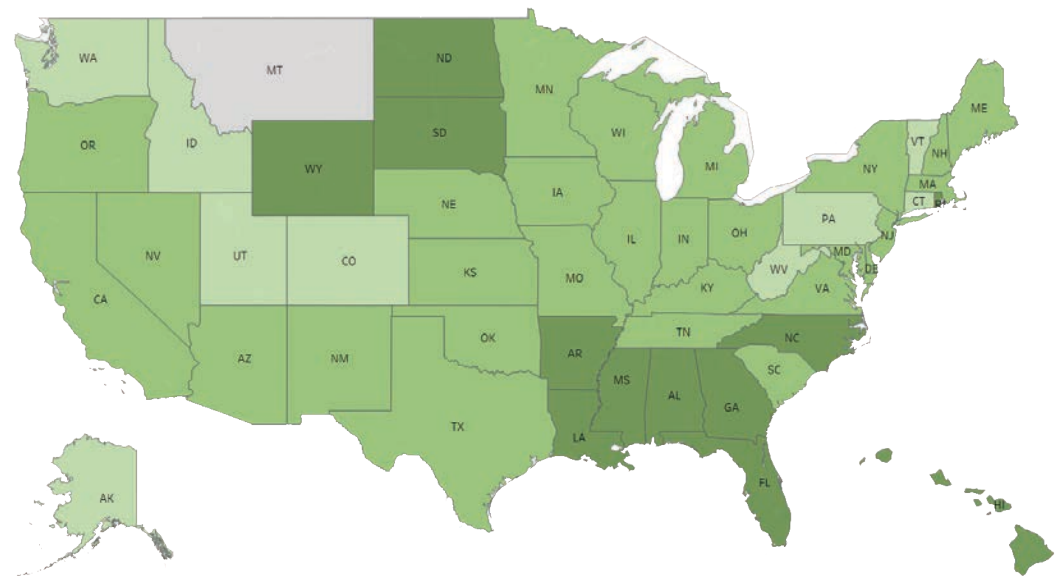
+44.1%
YoY HEV Sales Volume Growth

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



+3.5 ppt
YoY HEV Market Share Change

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



Q4

+43.8%

Oct 1 2024 - Jan 2 2025 vs.
Oct 3 2023 - Jan 3, 2024

Top 5 States for Electrified Vehicle Sales (YTD)

Data as of 3/31/2025



Total EV Sales

Total retail sales*	376,288
EV sales	168,895
EV market share	44.9%
YoY sales volume growth	16.7%
YoY market share change	+5.2 ppt

BEV

BEV sales	76,926
BEV market share	20.4%
YoY sales volume growth	-3.0%
YoY market share change	-1.3 ppt

PHEV

PHEV sales	15,067
PHEV market share	4.0%
YoY sales volume growth	19.4%
YoY market share change	+0.5 ppt

HEV

HEV sales	76,902
HEV market share	20.4%
YoY sales volume growth	45.7%
YoY market share change	+5.9 ppt



Total EV Sales

Total retail sales*	287,411
EV sales	66,853
EV market share	23.3%
YoY sales volume growth	42.5%
YoY market share change	+10.4 ppt

BEV

BEV sales	27,709
BEV market share	9.6%
YoY sales volume growth	27.7%
YoY market share change	+1.6 ppt

PHEV

PHEV sales	4,808
PHEV market share	1.7%
YoY sales volume growth	63.2%
YoY market share change	+0.6 ppt

HEV

HEV sales	34,336
HEV market share	11.9%
YoY sales volume growth	54.1%
YoY market share change	+3.6 ppt



Total EV Sales

Total retail sales*	309,946
EV sales	58,446
EV market share	18.9%
YoY sales volume growth	37.1%
YoY market share change	+7.2 ppt

BEV

BEV sales	21,673
BEV market share	7.0%
YoY sales volume growth	19.8%
YoY market share change	+0.7 ppt

PHEV

PHEV sales	3,191
PHEV market share	1.0%
YoY sales volume growth	69.6%
YoY market share change	+0.4 ppt

HEV

HEV sales	33,582
HEV market share	10.8%
YoY sales volume growth	48.2%
YoY market share change	+3.0 ppt

*All powertrains

Top 5 States for Electrified Vehicle Sales (YTD)

Data as of 3/31/2025

4. New York



Total EV Sales

Total retail sales*	187,394
EV sales	36,502
EV market share	19.5%
YoY sales volume growth	15.2%
YoY market share change	+10.8 ppt

BEV

BEV sales	11,751
BEV market share	6.3%
YoY sales volume growth	19.2%
YoY market share change	+10.8 ppt

PHEV

PHEV sales	5,821
PHEV market share	3.1%
YoY growth in volume	-26.4%
YoY market share change	-1.1 ppt

HEV

HEV sales	18,930
HEV market share	10.1%
YoY sales volume growth	36.0%
YoY market share change	+2.7 ppt

5. Washington



Total EV Sales

Total retail sales*	59,423
EV sales	24,913
EV market share	41.9%
YoY sales volume growth	20.0%
YoY market share change	+36.2 ppt

BEV

BEV sales	10,821
BEV market share	18.2%
YoY sales volume growth	11.3%
YoY market share change	+1 ppt

PHEV

PHEV sales	2,085
PHEV market share	3.5%
YoY growth in volume	15.6%
YoY market share change	+0.3 ppt

HEV

HEV sales	12,007
HEV market share	20.2%
YoY sales volume growth	30.0%
YoY market share change	+3.9 ppt

Industry Reflections

Data as of 3/31/2025

U.S. automotive industry sales boomed in March, drove 5.8% YoY increase.

Total retail sales – across all powertrain types – reached 3,076,573 units in Q1 2025, marking a 5.8% rise compared to the same period in 2024. This growth was largely driven by a strong March, which accounted for 1,270,589 units sold – a 12.5% increase over March 2024.

EV sales and market share surged in March.

EV sales rose 29.6% compared to Q1 2024, primarily fueled by sales in March, which accounted for 41% of total Q1 (EV) sales.

Nearly one in four vehicles sold in Q1 were EVs.

March's strong sales performance propelled EVs to 24.4% market share in the first quarter of the year, bringing the U.S. closer to having one in four vehicles on the road powered by an electrified powertrain.

HEVs outpace BEVs and PHEVs

HEVs saw a 44.1% YoY increase in sales in Q1 2025, outpacing both BEVs, which rose 15.4%, and PHEVs, which were up 16.5%. This growth pushed HEVs to 13.3% market share, a 3.5 pp gain over Q1 2024. HEVs remain the fastest-growing segment, with just six brands – Toyota, Honda, Hyundai, Ford, Lexus and Kia – accounting for 97% of the segment's volume.

Compact SUVs led electric vehicle segments.

Among electric vehicle (EV) sales, compact SUVs took the lead, accounting for 5.9% of all vehicles sold. They were followed by luxury mid-sized SUVs at 3.6%, mid-sized cars at 2.5%, large luxury SUVs at 2% and mid-size SUVs at 1.8%.

Tesla's share of BEV retail sales declined; non-Tesla sales rose.

Tesla's share of retail BEV sales continued to decline in Q1, falling from 45.1% to 44.2% in Q4 2024. Retail BEV sales for all brands excluding Tesla increased by 47% in Q1.

California remains the U.S. EV sales leader despite BEV sales decline.

California maintained its long-held leadership position regarding EV sales with a 16.7% increase in sales volume compared to Q1 2024 and a 5.2% increase in market share. HEV sales surged by 45.7%, followed by PHEVs (up 19.4%), while BEV sales dropped by 3%, primarily due to a decline in Tesla sales – down 8.6% compared to Q1 2024.

Washington surpassed New Jersey, cracking EV sales top five.

Washington entered the top five states for EV sales, driven by a 30% increase in HEV sales, 15.6% growth in PHEVs, and an 11.3% rise in BEV sales. The state achieved 5.7% market share for all EV powertrains.

Growth fluctuated among incentive-eligible vehicles.

Sales of vehicles eligible for incentives under the Inflation Reduction Act surged in Q1, driven by uncertainty about the future of these incentives under the new administration. In November, there was a 38.4% year-over-year increase in combined BEV/PHEV sales. However, this growth slowed to 26.9% in December and further dropped to 10.1% in January. Sales of combined BEVs and PHEVs rebounded in February with a 22% year-over-year increase, and in March, the year-over-year increase was 15.4% compared to Q1 2024.

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