

TESLA MOTORS IS DYING

Elon Musk's Tesla Releases 'Highly Unusual' EV Delivery Estimate Signaling Disappointing Q4 Sales

Elon Musk's Tesla has taken the "highly unusual" step of publishing analyst consensus delivery estimates ahead of announcing its critical fourth-quarter sales figures. Veteran Tesla watchers believe this signals a disappointing quarter for the tech tycoon's EV company.

Business Insider [reports](#) that Elon Musk's Tesla raised eyebrows this week when it announced a consensus of analyst predictions for the company's latest quarterly sales. This move, described as "highly unusual" by former Tesla investor Gary Black, suggests that the automaker may be bracing for disappointing results.

According to the delivery consensus, which is a compilation of predictions from analysts handpicked by Tesla, the company is expected to have sold 422,850 vehicles in the last three months of 2025. This figure represents a significant 14.6 percent decline compared to the same period last year and falls short of the broader Wall Street expectations of 440,907 EVs, as compiled by Bloomberg.

Tesla's decision to issue a public communication ahead of its critical sales announcement, expected as early as Friday, is a departure from its typical approach. The company did not respond to requests for comment on this surprising move.

The past year has been challenging for Tesla's core EV business, despite investor optimism surrounding the company's [robotaxi initiatives](#). The [expiration](#) of the \$7,500 federal tax credit in September dealt a heavy blow to electric car sales in the United States, with Tesla reportedly experiencing its lowest US sales since 2022 in November. This slump occurred despite the launch of more affordable versions of the company's popular Model 3 and Y EVs. Other automakers, such as Ford, Hyundai, and Kia, have also reported significant declines in EV sales in November. Industry giants Ford and GM have taken [massive charges](#) of \$19.5

billion and \$1.6 billion, respectively, as they adapt their EV strategies to navigate the shifting policy landscape.

Tesla's struggles extend beyond the US market. In China, the company faces intense competition from a plethora of local EV startups offering advanced electric vehicles at highly competitive prices. Meanwhile, in Europe, Tesla's sales have plummeted nearly 30 percent year-to-date, in part due to backlash over CEO Elon Musk's political interventions.

As the year draws to a close, Tesla finds itself in a race against time to avoid its second consecutive annual sales decline. Despite implementing various incentives in the US and pushing to introduce its Full Self-Driving technology in China and Europe, the surprise delivery consensus suggests that Tesla may end the year having sold over 100,000 fewer EVs compared to 2024.