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The Cybertruck in Numbers: How Tesla’s $39,900 Promise Became a 70,000-Sale Wind-Down

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EXECUTIVE SUMMARY

Tesla is winding down Cybertruck production around mid-2027 after selling roughly 70,000 trucks in three years against a 250,000-a-year target. This study measures the sales collapse, the price climb from a promised $39,900 to $74,990, the $800 million-plus inventory pile-up, and the Cybercab robotaxi bet now taking the factory floor.

KEY RESEARCH FINDINGS & STRATEGIC OUTLOOK

Executive Summary AUSTIN Tesla is winding down the Cybertruck. On November 6, chief executive Elon Musk said production of the stainless-steel pickup at Gigafactory Texas would wind down around the middle of 2027, "to make room for increased Cybercab production." The decision ends a three-year sales run that never came close to the plan: roughly 70,000 trucks sold in the United States against a factory built for 250,000 a year and a reservation list once counted in the millions. The numbers tell the story plainly. Kelley Blue Book estimates put American sales at 38,965 in 2024, 20,237 in 2025 and just 11,586 in the first nine months of 2026, down 28 percent year on year. The third quarter of 2026 brought the weakest reading yet, with Tesla’s "Other Models" category the bucket that holds the truck falling 48 percent to 8,295 vehicles. This study measures the gap between the promise and the result, the cost of the miss, and the robotaxi bet now taking the factory floor. Methodology This study rests on the announcement itself Musk’s November 6 post on X cross-checked against reporting by Reuters, the Financial Times, CNBC and trade outlets, and against sales estimates from Kelley Blue Book and Cox Automotive, delivery analysis from Electrek, recall records from the United States National Highway Traffic Safety Administration, and registration data from S&P Global Mobility. Tesla does not disclose Cybertruck deliveries separately, so every sales figure in this study is a third-party estimate and is labelled as such. Where estimates differ notably on third-quarter 2026 volumes the study gives the range and names the source of each figure. Prices are list prices reported at the time, and recall and inventory figures are taken from official records and trade reporting

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