



December 15th, 2025

Attention Valued Dealers and Customers –

I wanted to reach out personally following Ford's announcement today to ensure you understand the key parts of the news and how it impacts your fleet. We have announced changes to our product lineup that affect our vehicle portfolio both today and in the future.

Immediate Changes to the F-150 Lightning

The primary change affecting our current lineup concerns the all-electric F-150 Lightning. We have announced that production of the current F-150 Lightning has ended. If your business has already placed fleet orders for 26MY F-150 Lightning trucks, our Ford Pro sales team and account managers will be in touch. We will follow-up on all orders in the coming days to discuss any alternative options available to you.

Continuing Our Commitment to Electrification

Despite this shift, we remain committed to providing electric solutions where they make the most sense for your business. We will continue to offer the all-electric Mustang Mach-E and E-Transit models for fleets looking to deploy fully electric vehicles immediately.

Future Roadmap: Hybrids, EREVs, and New EV Platforms

Moving forward, we are shifting our powertrain strategy to focus more on affordable electric vehicles and an expanded range of hybrid models. This includes the debut of a new EREV (Extended Range Electric Vehicle) technology in our lineup.

- Starting in 2027: We will focus our fully electric lineup around our newly developed UEV (Universal Electric Vehicle) platform. This advanced platform will feature incredible software capabilities and underpin multiple affordable vehicles in our lineup – starting with a new pick-up truck in 2027.
- Starting from 2029: I am excited to confirm that Ford will launch a new wave of vehicles designed to support your business, including a new F-150 Lightning as an EREV that will target an estimated 700+ miles of range, a new gas and hybrid-powered van, and new gas-powered "Built Ford Tough" pickup trucks, including a new Super Duty with multiple powertrain choices.

New Opportunity: Battery Energy Storage

Finally, I wanted to share a new area of business that we have just announced. Ford plans to shift manufacturing to advanced 5-megawatt-hour battery energy storage systems designed for U.S. industrial and commercial customers. LFP prismatic cells, BESS modules and 20-ft DC container systems are planned to be manufactured starting in



2027. If you think there could be a need for your business in this space, you can register your interest at energy@ford.com.

I wanted you to hear this news directly from me. We deeply value our partnership, and I look forward to talking to you more, and sharing more details about these new technologies and products soon.

The full details of our announcement can be found here:

<https://www.fromtheroad.ford.com/us/en/articles/2025/ford-reinvests-trucks-hybrids-affordable-electric-vehicles>

Sincerely,

A handwritten signature in black ink, appearing to read "Matt Atkenson", with a long, sweeping horizontal stroke extending to the right.

Matt Atkenson

Executive Director, Ford Pro N.A. Sales & Operations

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