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THE GLOBAL AUTOMAKER RATING 2025

JUNE 2026

WHO'S WHO IN 2025?

The fourth iteration of the Global Automaker Rating ranks the world's 22 largest automakers on their progress towards a transition to zero-emission vehicles (ZEVs). The report evaluates automakers on custom-built metrics across three areas: market dominance, technology performance, and strategic vision. Those with the highest scores are best positioned for competitive success in the electric transition.

MARKET DOMINANCE

ZEV-EQUIVALENT SALES SHARE • CLASS COVERAGE

Reflecting the progress each automaker has made in its transition to zero-emission vehicles.

Key trends:

Overall, the ZEV transition progressed in 2025, with 21 out of 22 automakers increasing their ZEV-equivalent sales share year-on-year. Incremental progress among the largest automakers contrasts with the rapid acceleration seen among fast-growing new competitors.

» Tesla maintained a 100% ZEV sales share; BYD ranked second at 77%, surpassing Tesla in global battery electric vehicle (BEVs) sales volume for a second consecutive year.

» 15 out of 21 automakers improved their class coverage; nearly half the automakers now cover more than 50% of all vehicle classes measured

» China-based manufacturers continue to lead on class coverage, occupying 4 of the 5 top spots (ChangAn, Chery, SAIC, Geely, BYD)—while most US- and Japan-based automakers offered EVs in fewer than 30% of segments analyzed.

» For the first time, a non-Chinese manufacturer (Stellantis) entered the top five on class coverage, driven by the launch of three new electric vehicle (EV) models.

TECHNOLOGY PERFORMANCE

ENERGY CONSUMPTION • CHARGING SPEED • DRIVING RANGE • GREEN STEEL • BATTERY RECYCLING & REPURPOSING

Considers a consumer's EV experience and the automaker's reduction in upstream emissions from production, an important part of decarbonizing the automotive industry.

Key trends:

As core EV technology matures, automakers are balancing technological progress with cost reduction to appeal to a broader consumer base. Optimization of existing platforms over new development has emerged as a key tactic.

» 8 out of 21 automakers improved their energy efficiency; the fleet average remained largely unchanged—132 Wh/km in 2024 vs. 131 Wh/km in 2025.

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» 11 out of 21 improved charging speed; the industry average declined slightly from 93 kW to 92 kW — though the fastest-charging automaker's BEVs charge 4x faster than the slowest.

» 13 out of 21 saw driving range improvements, but the group average dipped slightly from 431 km to 428 km; GM surpassed Tesla for the highest fleet-average range at 573 km.

» 7 automakers have announced green steel targets and 8 have signed offtake agreements; Mercedes-Benz led on green steel, followed by BMW, Ford, VW, and GM.

» Progress on battery recycling continued but implementation status of many projects remains unclear; Tesla, Great Wall, Stellantis, Geely, and Tata Motors led this metric.

STRATEGIC VISION

ZEV TARGET • ZEV INVESTMENT • EXECUTIVE COMPENSATION ALIGNMENT

Reflecting the vision and commitment of each manufacturer in the ZEV transition.

KEY TRENDS:

The ZEV transition is trending toward two realities, where global legacy automakers are revising down their ZEV sales targets and pulling back investments, as others, particularly in China, are accelerating ahead to capture global market share.

» Geely and SAIC met their 2025 interim goals of 50% EVs a year early, while Stellantis, Honda, and GM recorded explicit downward revisions of their 2030 targets.

» ChangAn became the best performer among legacy automakers on EV targets, with a goal of 75% EV sales by 2030.

» 4 automakers saw an increase in their investments, meanwhile others including Ford, Stellantis, GM, and Honda pulled back; BYD maintained the highest cumulative global EV investment.

» 7 manufacturers linked executive compensation to EV targets; Stellantis saw its score decline in part due to the removal of EV-linked measures from its short-term executive incentives.

POLICY ALIGNMENT

20 out of 22 automakers remain out of step with Paris-aligned EV trajectories, according to InfluenceMap ratings, despite their demonstrated technological readiness. Many automakers actively advocated for longer timelines and regulatory flexibilities in the United States, European Union, and India.

These revised, lower regulatory targets provide little incentive for lagging automakers to catch up to their competition in preparing for an EV future. Strengthening policy frameworks to reflect proven capabilities of the industry leaders is essential to prevent a fragmented global EV transition.

Download the full report

PUBLICATION DETAILS

Title: The Global Automaker Rating 2025: Who is leading the transition to electric vehicles?

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