

**Owner-Reported Problems Point to Lower New-Vehicle Quality as Price Competition Intensifies, J.D. Power Finds**

Land Rover, GAC Honda and Chery Rank Highest in Respective Segments

**SHANGHAI: 28 Aug. 2025** – Overall new-vehicle quality in China has declined from 2024 by a notable increase of 17 problems per 100 vehicles (PP100) to 229 PP100, according to the J.D. Power 2025 China Initial Quality Study<sup>SM</sup> (IQS), released today. As price competition increases, the reported quality of internal combustion engine (ICE) vehicles has deteriorated across all three brand segments. Domestic brands and mass market brands have each increased by 18 PP100, while premium brands have risen by 13 PP100, suggesting that cost pressure under fierce competition may be directly impacting quality control and delivery performance.

While internal combustion engine (ICE) vehicles have shown significant improvement in product appeal,<sup>1</sup> quality problems have continued to climb for a second consecutive year, highlighting a widening gap between enhanced product experience and owner-perceived quality.

The study, now in its 26th year, measures initial vehicle quality by examining problems experienced by new-vehicle owners within the first two to six months of ownership. Overall initial quality is determined by problems per 100 vehicles, with a lower number of problems indicating higher quality.

The 2025 study finds that both design-related problems and manufacturer-related problems have risen sharply, up by 9.0 PP100 and 8.8 PP100, respectively, from 2024. The study also reveals that the accelerating push toward intelligent features has introduced new quality risks. As ICE vehicles undergo rapid iterations of intelligent functions, problems involving infotainment systems, seating and driver-assistance technologies are climbing. Among the nine major problem categories measured in the study, all except powertrain have increased in PP100 compared with 2024. Infotainment (+5.2 PP100), seats (+3.3 PP100) and driver assistance (+1.8 PP100) are the most notable. Infotainment problems are highly concentrated, with owners citing poor human vs. machine interface design (voice recognition, touch control logic) and hardware limitations (screen responsiveness, Bluetooth connectivity), which significantly disrupt the continuity of frequently used functions.

“Against the backdrop of multiple competitive pressures in terms of industry technology, configurations and pricing, the IQS performance of traditional fuel-powered vehicles has sustained a pronounced year-over-year decline,” said **Elvis Yang, general manager of auto product practice at J.D. Power China**. “How to maintain market share and enhance perceived quality amid the new energy transformation is a key issue that ICE vehicle manufacturers must solve in the next few years. At present, the top priority is to optimize the in-vehicle experience of technological configurations, focus on users’ high-frequency scenarios and make efforts to solve issues with strong user perception such as misidentification and slow response. Meanwhile, as the user structure and demand preferences of ICE vehicle owners change, automakers need to re-examine the user experience indicator system and quality risk control strategies and effectively put user-centric quality management at the forefront.”

Following are key findings of the 2025 study:

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<sup>1</sup> Source: J.D. Power 2025 China Automotive Performance, Execution and Layout (APEAL) Study<sup>SM</sup>. The study measures owners’ emotional attachment to and level of excitement with their new vehicle across 37 attributes in 10 vehicle experience groups: exterior; setting up and starting; getting in and out; interior; performance; driving feel; keeping your safe; infotainment; driving comfort; and fuel economy.

- **Core design and engineering issues escalate:** Problems related to functional design usability, NVH (noise, vibration, harshness) engineering and failures of key components have risen significantly. This reflects shortcomings in aligning R&D with user scenarios as well as reduced efficiency in supply chain collaboration. Compared with 2024, the areas with highest PP100 deterioration include uncomfortable seatbelts (+1.4 PP100); excessive fan/blower noise (+1.1 PP100); and voice recognition systems that are difficult to use (+0.9 PP100).
- **Hybrid vehicles demonstrate competitive advantage:** Both premium and mass market brands continue to expand their hybrid portfolios, with lower prices further accelerating market penetration. In 2025, hybrid models (including hybrid electric vehicles (HEVs) and 48V mild hybrids) account for 18% of fuel vehicle sales, up from 14% in 2024. Premium brands constitute 50% of this volume, while mass market brands account for 47%. At the same time, the average transaction price of hybrids has fallen to RMB 331,000 from RMB 390,000, a 15% year-over-year decline. Compared with conventional gasoline vehicles, hybrids deliver superior initial quality and product design. With consistent reliability and an enhanced user experience, hybrid vehicles are emerging as a differentiated advantage and are poised to become a strategic pathway for fuel vehicles to compete against new energy vehicles.

## Study Rankings

**Land Rover** ranks highest in initial quality among premium brands with 208 PP100, followed by **Porsche** (213 PP100) and **Cadillac** (218 PP100).

**GAC Honda** (208 PP100) ranks highest in initial quality among mass market brands. **Dongfeng Honda** (209 PP100) ranks second. **GAC Toyota** and **SAIC Volkswagen** rank third in a tie, each with 219 PP100.

**Chery** (220 PP100) ranks highest in initial quality among Chinese domestic brands. **GAC Trumpchi** (221 PP100) ranks second. **CHANGAN** and **Geely** rank third in a tie, each with 222 PP100.

Across 18 segments in the 2025 study, 18 models receive awards.

- GAC Honda models ranking highest in their respective segment are **Honda Accord** and **Honda Odyssey**.
- Geely models ranking highest in their respective segment are **Geely Binyue** and **Geely Boyue**.
- SAIC Volkswagen models ranking highest in their respective segment are **Volkswagen Lamando L** and **Volkswagen Lavida**.

Other models ranking highest in their respective segment are **Cadillac XT5**; **Changan CS75**; **Chery Tiggo 9**; **Land Rover Range Rover**; **Lexus NX**; **Mercedes-Benz A-Class**; **MG 5**; **Toyota Crown Kluger**; **Toyota Frontlander**; **Volkswagen Bora**; **Volvo S90**; and **Wuling Jiachen**.

The China Initial Quality Study (IQS) measures new-vehicle quality by examining problems in two segments: design-related problems and defects/ malfunctions. Specific diagnostic questions include 218 problem symptoms across nine categories: features/ controls/ displays; exterior; interior; infotainment system; seats; driving experience; driving assistance; powertrain; and climate.

The 2025 study is based on responses from 19,913 owners who purchased their vehicle between July 2024 and March 2025. The study includes 148 models and 39 different brands; among them, 143 models and 38 brands achieved sufficient samples. The study was fielded from January through May 2025 in 81 major cities across China.

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**Media Relations Contacts**

Wenjing Ji, J.D. Power; China; +86 21 8026 5719; [wenjing.ji@jdpa.com](mailto:wenjing.ji@jdpa.com)

Geno Effler, J.D. Power; USA; 001-714-621-6224; [media.relations@jdpa.com](mailto:media.relations@jdpa.com)

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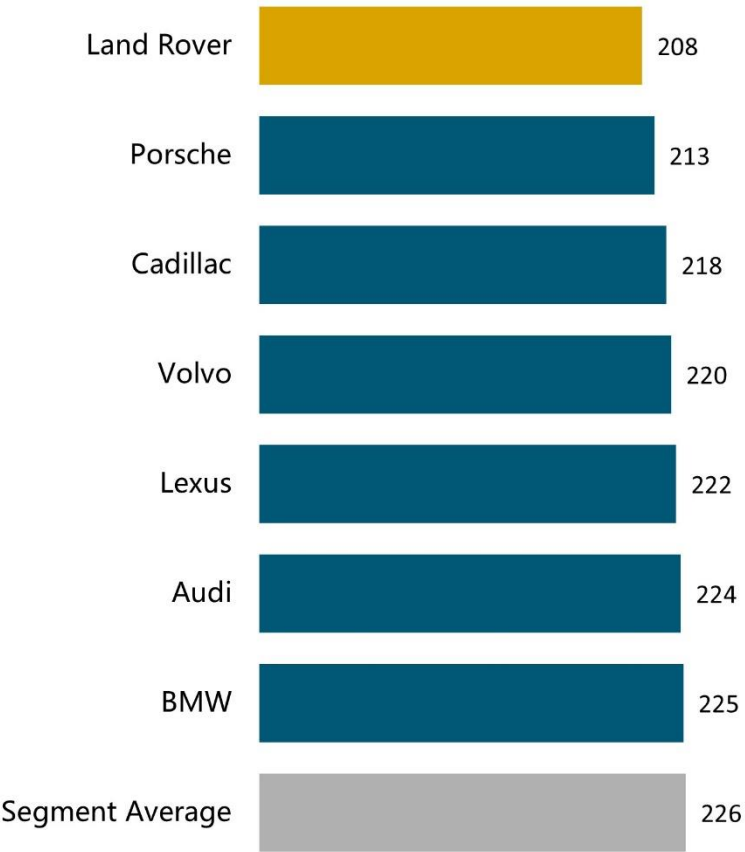
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NOTE: Six charts follow.

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2025 China Initial Quality Study<sup>SM</sup> (IQS)

Brand Ranking  
Premium Brands  
*Problems per 100 Vehicles (PP100)*



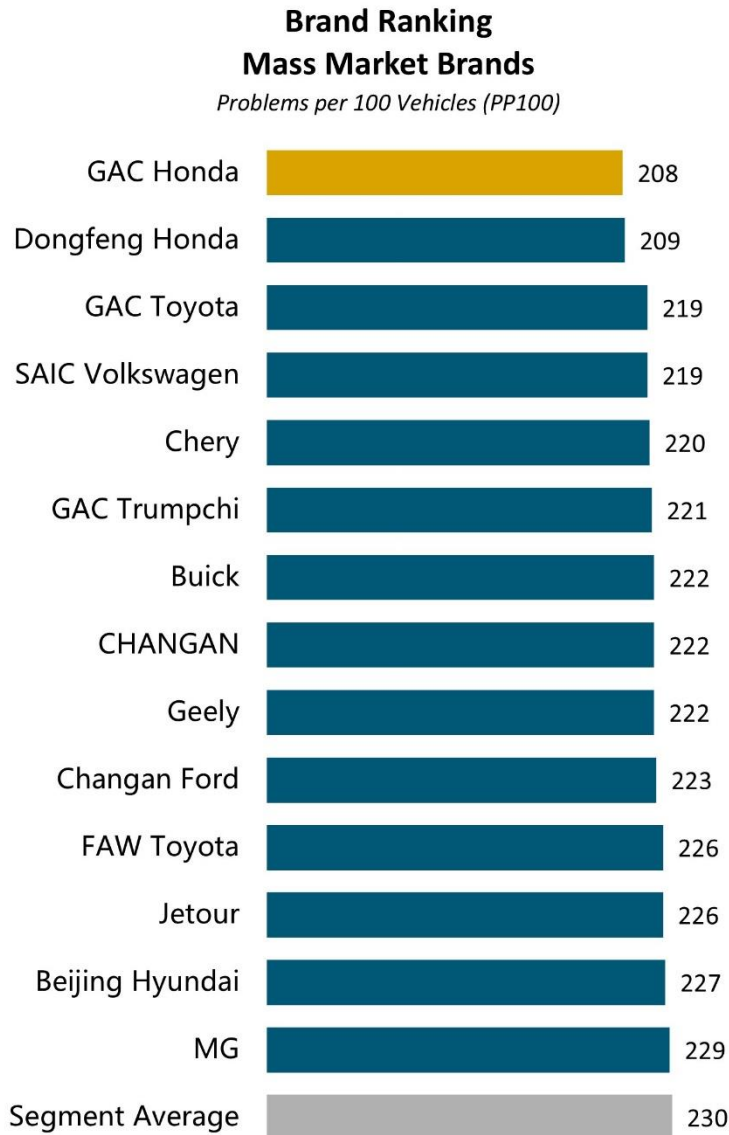
Source: J.D. Power 2025 China Initial Quality Study<sup>SM</sup> (IQS)

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## 2025 China Initial Quality Study<sup>SM</sup> (IQS)

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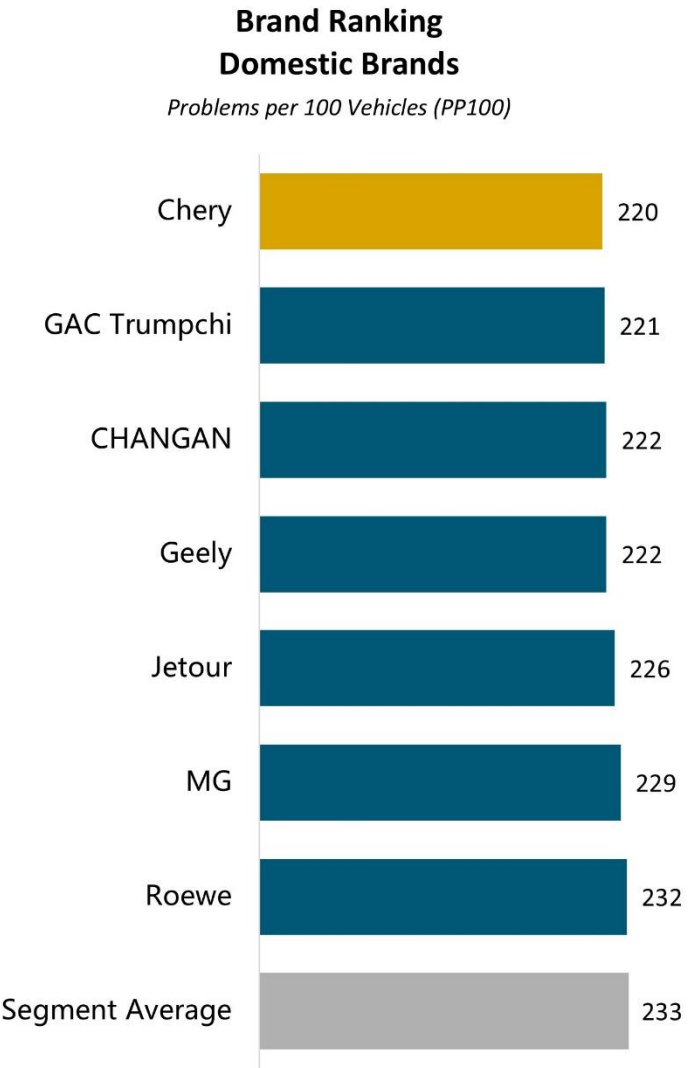


*Notes: In alphabetical order if there are tie scores. Scores are not shown for small sample brands (n=30~99).*

*Source: J.D. Power 2025 China Initial Quality Study<sup>SM</sup> (IQS)*

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2025 China Initial Quality Study<sup>SM</sup> (IQS)



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## 2025 China Initial Quality Study<sup>SM</sup> (IQS)

### Top Three Models per Segment Car Segments

#### Compact Car\*

**Highest Ranked: MG 5**  
Second Ranked: Geely Emgrand

#### Compact Upper Car\*

**Highest Ranked: Volkswagen Lavida**

#### Compact Premium Car

**Highest Ranked: Mercedes-Benz A-Class**  
Second Ranked: Volvo S60  
Third Ranked: Audi A3

#### Midsized Economy Car\*

**Highest Ranked: Volkswagen Bora**  
Second Ranked: Buick Verano Pro/Pro GS

#### Midsized Car

**Highest Ranked: Volkswagen Lamando L**  
Second Ranked: Buick Regal (tie)  
Second Ranked: Chery Arrizo 8 (tie)

#### Midsized Upper Car

**Highest Ranked: Honda Accord**  
Second Ranked: Honda Inspire  
Third Ranked: Volkswagen Passat

#### Midsized Premium Car

**Highest Ranked: Volvo S90**  
Second Ranked: Audi A6L  
Third Ranked: BMW 5 Series

\* No other model in this segment performs above segment average.

Note: In alphabetical order if there are tie scores. To qualify for an award in the 2025 China Initial Quality Study (IQS), models must meet these criteria: 1. Four models with at least 100 samples, or three models with at least 100 samples and with more than 80% of market share. 2. At least one model must perform better than segment average. In the Large Premium Car segment, these criteria were not met, thus no awards have been issued.

Source: J.D. Power 2025 China Initial Quality Study<sup>SM</sup> (IQS)

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## 2025 China Initial Quality Study<sup>SM</sup> (IQS)

### Top Three Models per Segment SUV Segments

#### Compact SUV\*

**Highest Ranked: Geely Binyue**  
Second Ranked: GAC Trumpchi GS3 Yingsu

#### Compact Upper SUV

**Highest Ranked: Changan CS75**  
Second Ranked: Changan CS55 Plus  
Third Ranked: Volkswagen Tharu XR

#### Compact Premium SUV

**Highest Ranked: Lexus NX**  
Second Ranked: Audi Q3 (tie)  
Second Ranked: Mercedes-Benz GLB-Class (tie)

#### Midsize Economy SUV

**Highest Ranked: Geely Boyue**  
Second Ranked: Chery Tiggo 7 Plus  
Third Ranked: Changan UNI-Z

#### Midsize SUV

**Highest Ranked: Toyota Frontlander**  
Second Ranked: Geely Boyue L  
Third Ranked: Changan CS75 Plus (tie)  
Third Ranked: Chery Tiggo 8 Pro (tie)  
Third Ranked: Hyundai Tucson L (tie)

#### Midsize Upper SUV

**Highest Ranked: Chery Tiggo 9**  
Second Ranked: Honda CR-V  
Third Ranked: Volkswagen Tiguan L

#### Midsize Premium SUV\*

**Highest Ranked: Cadillac XT5**  
Second Ranked: Lexus RX

#### Large SUV

**Highest Ranked: Toyota Crown Kluger**  
Second Ranked: Toyota Highlander  
Third Ranked: Volkswagen Teramont

#### Large Premium SUV

**Highest Ranked: Land Rover Range Rover**  
Second Ranked: Porsche Cayenne  
Third Ranked: BMW X5

\* No other model in this segment performs above segment average.  
Note: In alphabetical order if there are tie scores.

Source: J.D. Power 2025 China Initial Quality Study<sup>SM</sup> (IQS)

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## 2025 China Initial Quality Study<sup>SM</sup> (IQS)

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### Top Three Models per Segment MPV Segments

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#### Compact MPV\*

**Highest Ranked: Wuling Jiachen**  
Second Ranked: Wuling Hongguang S

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#### Large MPV

**Highest Ranked: Honda Odyssey**  
Second Ranked: GAC Trumpchi M8  
Third Ranked: Buick All New GL8

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*\* No other model in this segment performs above segment average.*

*Note: To qualify for an award in the 2025 China Initial Quality Study (IQS), models must meet these criteria: 1. Four models with at least 100 samples, or three models with at least 100 samples and with more than 80% of market share. 2. At least one model must perform better than segment average. In the midsize MPV segment, these criteria were not met, thus no awards have been issued.*

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*Source: J.D. Power 2025 China Initial Quality Study<sup>SM</sup> (IQS)*

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