Chinese Domestic Brands Prevail in Initial Quality Study for the First Time, Competition Shifts to User Experience and Design Quality, J.D. Power Finds

Land Rover, Dongfeng Honda and Chery Rank Highest in Respective Segment

SHANGHAI: 25 Jun, 2026 – Overall initial quality performance in 2026 shows improvement, with design issues emerging as the primary quality challenge, according to the J.D. Power 2026 China Initial Quality Study (IQS)SM. New-vehicle quality scores are down to 211 problems per 100 vehicles (PP100), a decrease of 8 PP100 from 2025. A reduction in malfunction-related complaints account for 7 of those PP100 improvements. Notably, Chinese domestic brands (218 PP100) outperformed international mass market (224 PP100) and premium brands (219 PP100) for the first time. This milestone signifies domestic brands' substantive breakthroughs in feature configuration, user experience, manufacturing quality and quality control systems, marking a new phase of product competitiveness.

The study, now in its 27th 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 better quality.

The 2026 study finds that with the continuous rise of Automotive Performance, Execution and Layout (APEAL) scores, customer expectation benchmarks for product quality are also climbing in tandem, indicating user experience and design quality have become the key critical differentiators for advancing vehicle quality. Conventional complaints, such as those regarding powertrain quality, have significantly improved. However, three core categories defining in-cabin user experience such as infotainment systems, features/controls/instrument panel and interior, have seen year-over-year deterioration in PP100, increasing by 5.7, 4.5 and 2.5 PP100 respectively, compared to 2024.

"ICE vehicles tell an interesting story in 2026," said **Sean Wang, general manager of vehicle product competitiveness solutions** at J.D. Power China. “Conventional defects are largely under control, but the rapid pace of technology integration has introduced a new category of quality complaints -- and managing that complexity has become the central challenge for ICE brands. On the domestic side, the quality gains we're seeing trace directly back to NEV development experience, and for the first time, domestic brands have surpassed mass market international brands on average score. For international brands, the path forward is clear: translate their technology heritage into experiences that reflect how Chinese consumers actually use their vehicles -- particularly in voice interaction, infotainment and seat comfort." The study also shows that ICE vehicles remain the top choice for off-road driving and hardcore off-road SUVs will be among the most fiercely contested segments in the next few years. Maintaining product off-road capability and quality is fundamental. OEMs must address the growing demands of off-road users for seat comfort, space flexibility, and technology.

Following are some key findings of the 2026 study:

- **Quality differentiation is sharpening across segments:** Premium brands lead on high-configuration safety features, averaging 85%-92% fitment, while domestic brands are gaining ground through E/E architecture improvements and a deliberate push into premium comfort

features -- seat ventilation fitment alone has more than doubled since 2024, rising from 14% to 36%.

- **Demand for second-row seat adjustability increasing:** Complaints about insufficient second-row seat adjustment among ICE vehicle owners have surged, jumping to 29% in 2026 from 13% in 2024. As NEVs are widely prioritizing rear-cabin experience, ICE consumers are placing higher expectations on second-row flexibility and comfort features. Manufacturers must accelerate the rollout of comprehensive second-row functionalities to meet evolving user expectations.

- **Hybrid electric vehicles (HEVs) are moving up:** HEVs outperform conventional ICE vehicles in both noise-cancelling and fuel consumption performance. This dual advantage of quietness and fuel efficiency is actively reshaping user perceptions of traditional powertrains. Currently, premium brands are spearheading the popularization of hybrid technology, leading to an increasing hybrid penetration rate, rising to 43% in 2026 from 31% in 2024. Meanwhile, domestic brands are ramping up their R&D investment in HEV technologies to further strengthen their product competitiveness.

- **ICE is trending down in the premium segment:** Hybrids have become a mainstream option. The share of hybrid models in the premium segment has risen steadily to 43.4% in 2026 from 30.8% in 2024, exceeding the segment average. Premium brands are systematically integrating HEV technology into their mainstream portfolio, aiming to improve the performance, efficiency and refinement of the conventional powertrain via electrification to redefine premium ICE vehicles.

- **Hardcore off-road SUVs' core value is exploration for its customers**: While NEVs dominate most daily scenarios, ICE SUV owners show a higher "off-road and exploration" share (8.1%) compared to NEV SUV owners (6.9%), affirming these SUVs' distinct market fit. Current pain points during prolonged rough-terrain driving involve postural stability and fatigue, encompassing thigh support, seatback firmness and headrest adjustability. Manufacturers must therefore focus R&D on specific off-road needs like enhanced lateral seat bolstering, optimized vibration transmission, and zoned support rather than adapting urban SUV designs.

Study Rankings

Land Rover ranks highest among premium brands with 200 PP100, followed by **Cadillac** (203 PP100) and **Volvo** (206 PP100).

Dongfeng Honda (212 PP100) ranks highest among mass market brands, **Chery** (213 PP100) ranks second, **Geely** (214 PP100) ranks third.

Chery ranks highest among Chinese domestic brands with 213 PP100, followed by Geely (214 PP100). **CHANGAN, GAC Trumpchi** and **Jetour** rank third in a tie, each with 216 PP100.

Across 18 segments in the 2026 study, 19 models receive awards.

- CHANGAN models ranking highest in their respective segments are **Changan Eado Plus, Changan CS 55 Plus** and **Changan CS75 Pro**.
- GAC Toyota models ranking highest in their respective segments are **Toyota Levin** and **Toyota Highlander**.
- Volvo models ranking highest in their respective segments are **Volvo S60** and **Volvo S90.**

- SAIC Volkswagen models ranking highest in their respective segments are **Volkswagen Passat, Volkswagen Passat Pro** and **Volkswagen Tharu**.
- Chery models ranking highest in their respective segments are **Chery Tiggo 8 Plus** and **Chery Tiggo 9.**

Other models that rank highest in their respective segments are **FAW-Volkswagen Bora, Geely Binyue, Lexus NX, Cadillac XT5, Land Rover Range Rover, GAC Trumpchi M6 Pro/M6 Max, Honda Odyssey**.

The J.D. Power 2026 China Initial Quality Study (IQS) measures new-vehicle quality by examining problems in two segments: design-related problems and defect/malfunction. 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 2026 study is based on responses from 13,919 owners of ICE vehicles who purchased their new vehicle between July 2025 and February 2026. The study includes 131 models and 35 different brands, among which 127 models and all brands achieved sufficient samples. The study was fielded from January through April 2026 in 81 major cities across China.

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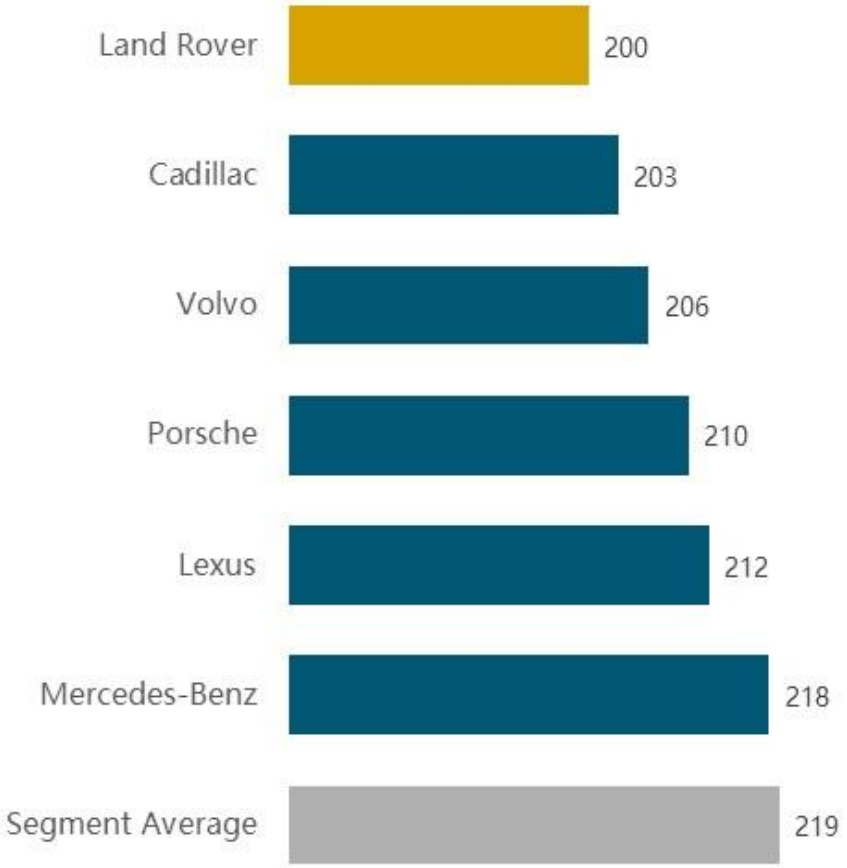
NOTE: Six charts follow.

J.D. Power
2026 China Initial Quality Study^{SM} (IQS)

Brand Ranking
Premium Brands

Problems per 100 Vehicles (PP100)



Notes: In alphabetical order if there are tie scores.

Source: J.D. Power 2026 China Initial Quality Study^{SM} (IQS)

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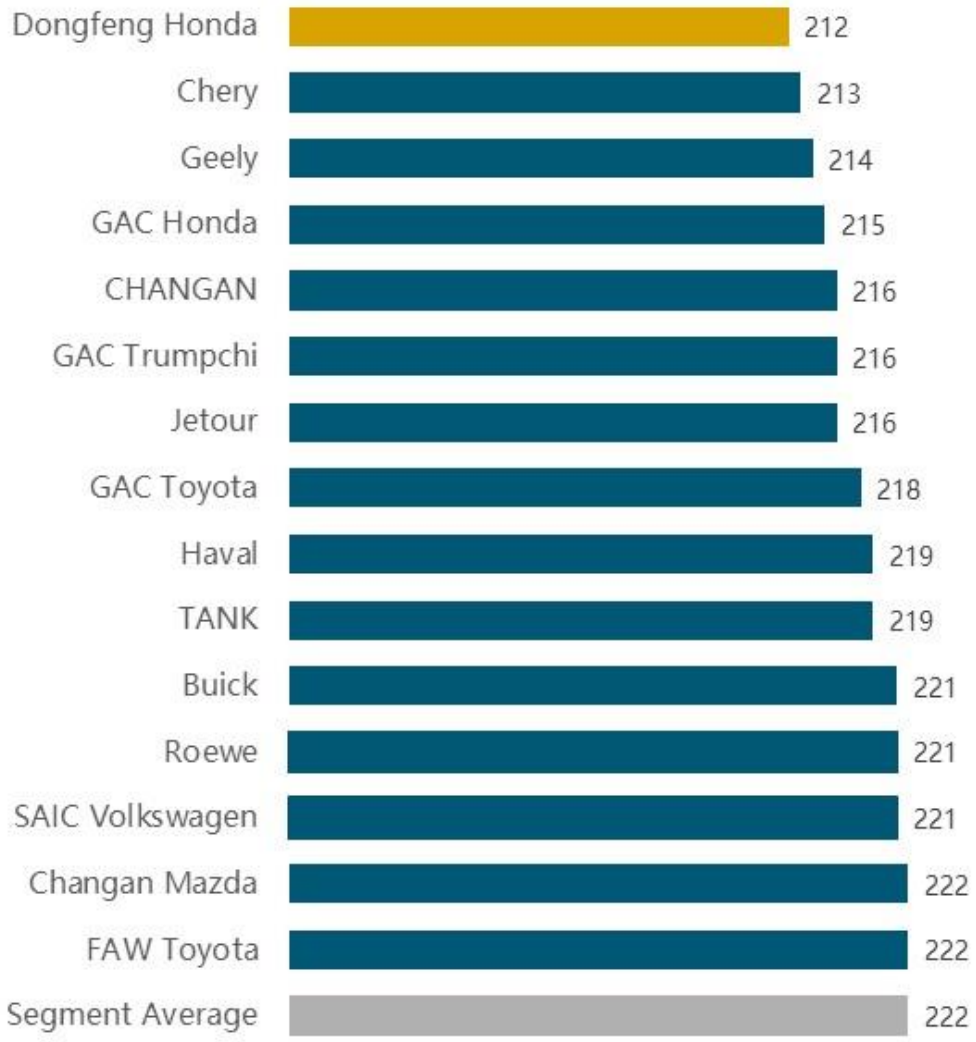
J.D. Power
2026 China Initial Quality Study℠ (IQS)

Brand Ranking
Mass Market Brands

Problems per 100 Vehicles (PP100)



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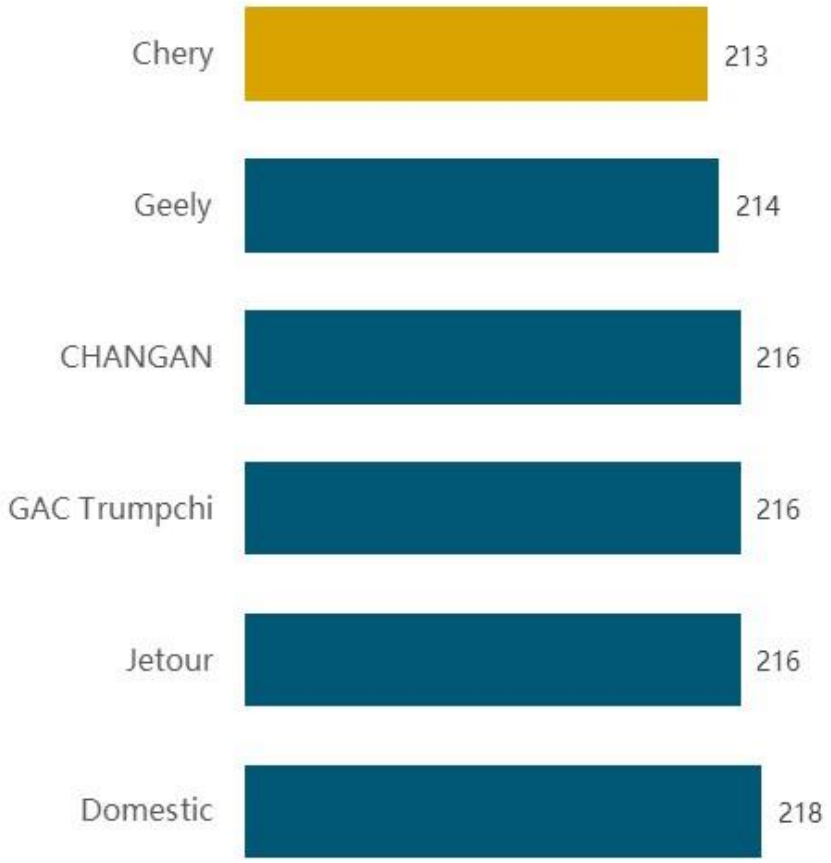
J.D. Power
2026 China Initial Quality Study^{SM} (IQS)

Brand Ranking
Domestic Brands

Problems per 100 Vehicles (PP100)



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2026 China Initial Quality Study℠ (IQS)

Top Three Models per Segment

Car Segments

Compact Car

Highest Ranked: Changan Eado Plus
Second Ranked: Roewe i5
Third Ranked: MG 5

Compact Upper Car*

Highest Ranked: Toyota Levin
Second Ranked: Changan Eado

Compact Premium Car

Highest Ranked: Volvo S60
Second Ranked: Cadillac CT5
Third Ranked: Audi A3

Midsize Economy Car

Highest Ranked: Volkswagen Bora
Second Ranked: Volkswagen Golf
Third Ranked: Geely Emgrand

Midsize Car

Highest Ranked: Volkswagen Passat
Second Ranked: Honda Inspire
Third Ranked: Chery Arrizo 8 (tie)
Third Ranked: Chery Arrizo 8 Pro (tie)

Midsize Upper Car

Highest Ranked: Volkswagen Passat Pro
Second Ranked: Buick LaCROSSE (tie)
Second Ranked: Toyota Camry 9 (tie)

Midsize Premium Car*

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

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

Source: J J.D. Power 2026 China Initial Quality Study℠ (IQS)

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J.D. Power
2026 China Initial Quality Study^{SM} (IQS)

Top Three Models per Segment

SUV Segments

Compact SUV*

Highest Ranked: Geely Binyue
Second Ranked: Changan X5 Plus

Compact Upper SUV*

Highest Ranked: Changan CS55 Plus
Second Ranked: Lynk & Co 06

Compact Premium SUV*

Highest Ranked: Lexus NX
Second Ranked: Audi Q3

Midsize Economy SUV

Highest Ranked: Changan CS75 Pro
Second Ranked: Chery Tiggo 7 Plus
Third Ranked: Geely Boyue (tie)
Third Ranked: Jetour X70 Plus (tie)

Midsize SUV

Highest Ranked: Chery Tiggo 8 Plus (tie)
Highest Ranked: Volkswagen Tharu (tie)
Third Ranked: Volkswagen T-ROC

Midsize Upper SUV

Highest Ranked: Chery Tiggo 9
Second Ranked: Toyota RAV4
Third Ranked: GAC Trumpchi GS8

Midsize Premium SUV*

Highest Ranked: Cadillac XT5
Second Ranked: Lexus RX

Large SUV*

Highest Ranked: Toyota Highlander

Large Premium SUV

Highest Ranked: Land Rover Range Rover
Second Ranked: Mercedes-Benz GLC Class
Third Ranked: Land Rover Defender

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

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2026 China Initial Quality Study^{SM} (IQS)

Top Three Models per Segment

MPV Segments

Compact MPV*

Highest Ranked: Wuling Hongguang V

Midsize MPV*

Highest Ranked:
GAC Trumpchi M6 Pro/ M6 Max
Second Ranked: GAC Trumpchi M8

Large MPV

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

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

Source: J J.D. Power 2026 China Initial Quality Study^{SM} (IQS)

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