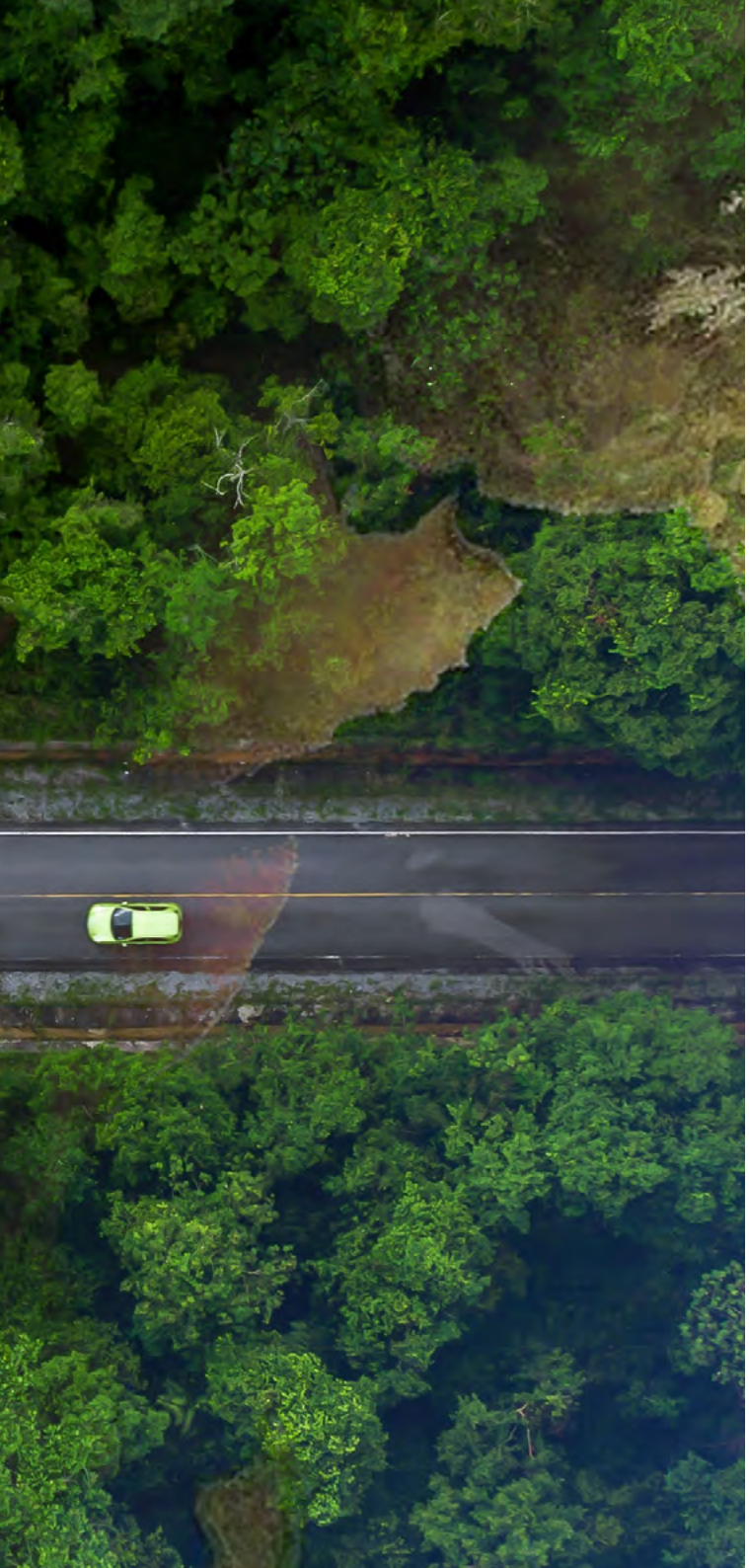
InfluenceMap

Automakers and Climate Policy Advocacy: A Global Analysis

How automaker lobbying threatens the global transition to electric vehicles

May 2024



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Notes: This report and its findings are the independent analysis of InfluenceMap using data from the International Energy Agency (IEA), S&P Global Mobility, and InfluenceMap's LobbyMap database. This analysis does not represent the views or opinions of S&P Global Mobility or the International Energy Agency.

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Executive Summary

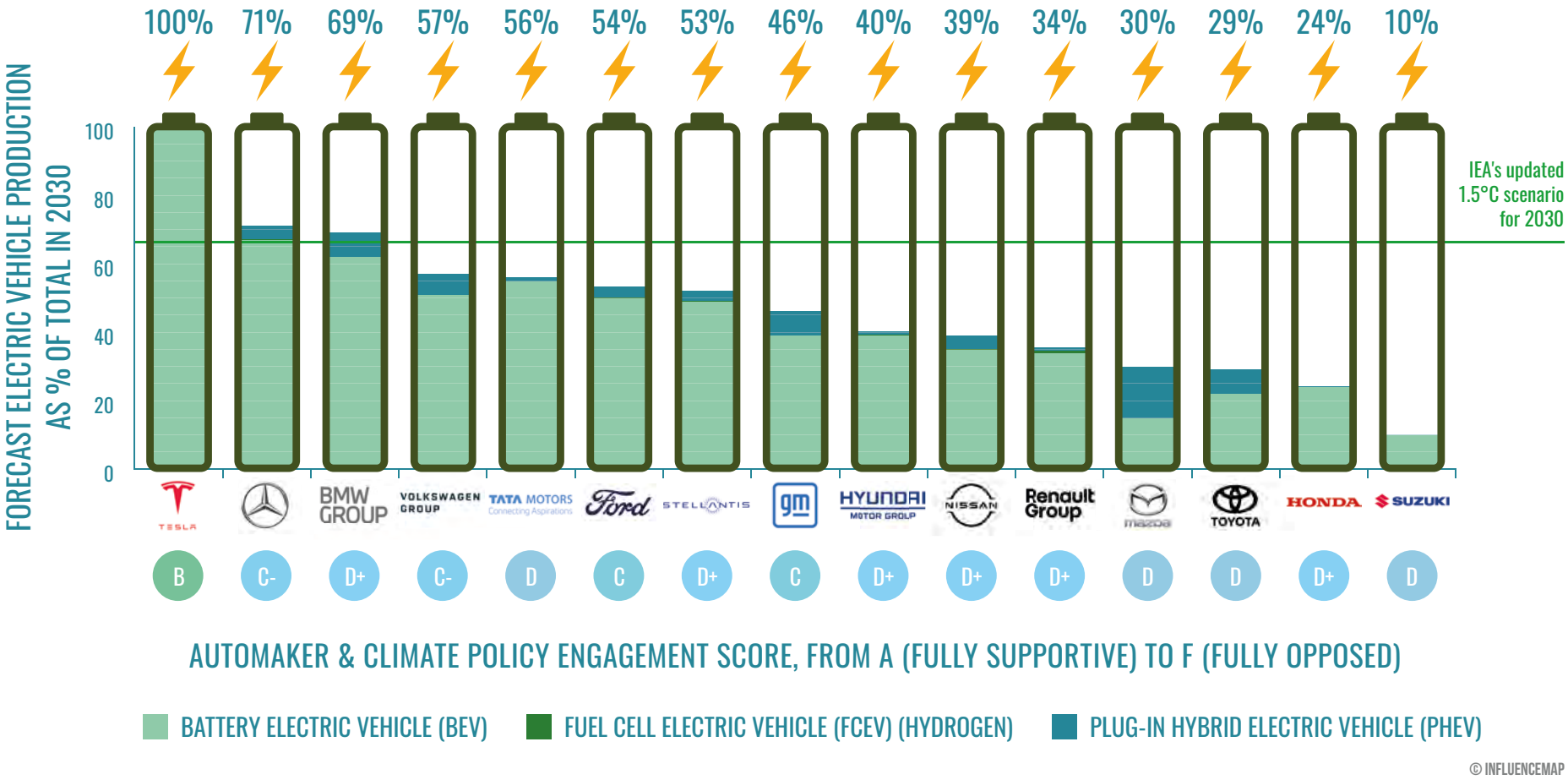
- **The world's largest automakers' advocacy strategies are putting global climate targets at risk and threatening the electric vehicle transition.** This finding comes from InfluenceMap's updated interactive *Automotive Climate Tool*. It combines a new analysis of 15 of the world's largest automakers' climate policy engagement in seven key regions, with an independent analysis of industry-standard data from the S&P Global Mobility February 2024 Light Vehicle Production Forecast dataset on automakers' electric vehicle production forecasts.

- **Negative lobbying by automakers is a key barrier to climate policy and higher electric vehicle uptake.** 10 of the 15 automakers analyzed for this report received a final Performance Band grade of D or D+, indicating advocacy that is misaligned with science-based policy. Toyota, with a Performance Band score of D, remains the lowest-scoring company and is found to be driving opposition to climate rules in multiple regions. In regulatory comments submitted in 2023, Toyota advocated to weaken GHG emissions standards in the *US* and *Australia*, engaged against stringent zero-emission vehicle mandates in *Canada* and the *UK*. Globally, in 2023-24, multiple climate policies for light-duty vehicles have been weakened following industry pressure. This includes *US greenhouse gas emission standards* and Australia's *fuel efficiency standards*.

- **Industry production electric vehicle forecasts fail to meet the IEA's updated 1.5°C scenario for most automakers.** The *IEA's updated 1.5°C scenario* modelled that 66% of all light-duty vehicle sales globally must be electric (battery electric (BEVs), fuel cell hydrogen (FCEVs) or plug-in electric (PHEVs)) by 2030 to meet net-zero targets by 2050. Independent InfluenceMap analysis of S&P Global Mobility data from February 2024 finds that only 53% of global light-duty vehicles produced are forecasted to be electric in 2030 (44% BEV, 9% PHEV, 0% FCEV). Only Tesla (100%), Mercedes-Benz (71%), and BMW (69%) appear aligned with a 1.5°C global target for electric vehicle production in 2030.

- **Japanese automakers are the least prepared for the electric vehicle transition and have the most active, strategic engagement against it.** The 4 automakers with the lowest proportion of forecasted electric vehicle production in 2030 are all from Japan (Suzuki at 10%, Honda at 24%, Toyota at 29% and Mazda at 30%), with Toyota, Mazda and Suzuki all receiving the lowest Performance Band scores (D) of all automakers analyzed. In 2023-24, Japanese automakers have driven advocacy to weaken and delay climate rules promoting battery electric vehicles, including in *Australia*, *India*, and the *US*, and are instead pushing for policies that favor a longer-term role for ICE-powered vehicles including hybrids.

Automakers' 2030 electric vehicle forecasts and climate policy engagement scores in 2024



- **Tesla leads positive climate policy advocacy.** Tesla, with a Performance Band of B, has the most positive climate advocacy of all automakers analyzed. In 2023-24, Tesla submitted regulatory comments actively supporting ambitious GHG emissions standards in *Australia*, *New Zealand,* and *the US* and zero-emission vehicle mandates in *Canada* and *the UK*. Other automakers also demonstrated positive climate policy engagement, including Ford advocating against *the UK* delaying its initial ICE phase-out to 2035. Leading electric vehicle production forecasts from BMW and Mercedes-Benz also suggest a future opportunity to positively reform their climate policy engagement strategies in alignment with their relative advantage in electric vehicle development.
- **Automotive industry associations are driving opposition to climate regulation.** An analysis of climate policy advocacy in seven key regions (Australia, EU, India, Japan, South Korea, UK and the US) finds that auto associations are leading efforts to delay and weaken key climate rules for light-duty vehicles. In the US, the Alliance for Automotive Innovation has led opposition to ambitious *fuel economy (CAFE)* and *GHG emissions standards*, while in Australia, the *Federal Chamber of Automotive Industries (FCAI)* led a strategic campaign to weaken fuel efficiency standards. Of the eight automotive industry associations included in this study, every automaker (except Tesla), remains a member of at least two of these groups, with most automakers a member of at least five of these associations globally.
- **Higher SUV and light truck production and automakers' push for policies to promote them is a growing climate problem.** The shift towards larger and less efficient vehicles has led to higher CO2 emissions, with SUVs' oil consumption accounting for *one-third of global oil demand growth* between 2021 and 2022. Yet SUV and light-commercial vehicle production are forecast to rapidly increase from 57% of global light-duty production in 2020, to 64% in 2030. Each automaker analyzed in this report, excluding Tata Motors, is forecasted to produce a higher combined proportion of such vehicles by 2030 as compared to 2020.InfluenceMap has also found evidence of automakers continuing to influence regulations to favor SUV and light-truck sales over smaller vehicles, such as in Australia.
- **A slower transition to electric vehicles will lock in higher oil demand and threaten global climate targets.** Without a rapid acceleration in electric vehicle production, fossil fuel-powered ICE vehicles will continue to fuel the climate crisis over their lifetime, with the average age of an *EU vehicle now 12 years old*. Automakers' negative climate advocacy and inadequate zero-emission vehicle production plans highlight the critical importance of regulatory action to facilitate emissions reductions for the sector.

Climate Change and Light-Duty Vehicles

1.1 Research

InfluenceMap's interactive, updated *Automotive Climate Tool* combines leading analysis of automakers' engagement on climate policy with independent analysis of industry-standard data from S&P Global Mobility's February 2024 dataset on forecasted light vehicle production up to 2030. In a May 2024 update, the tool has expanded to cover 15 of the world's largest automakers, 8 major automotive industry associations, and a detailed analysis of corporate engagement on 5 key climate policies in the EU, US, and Australia.

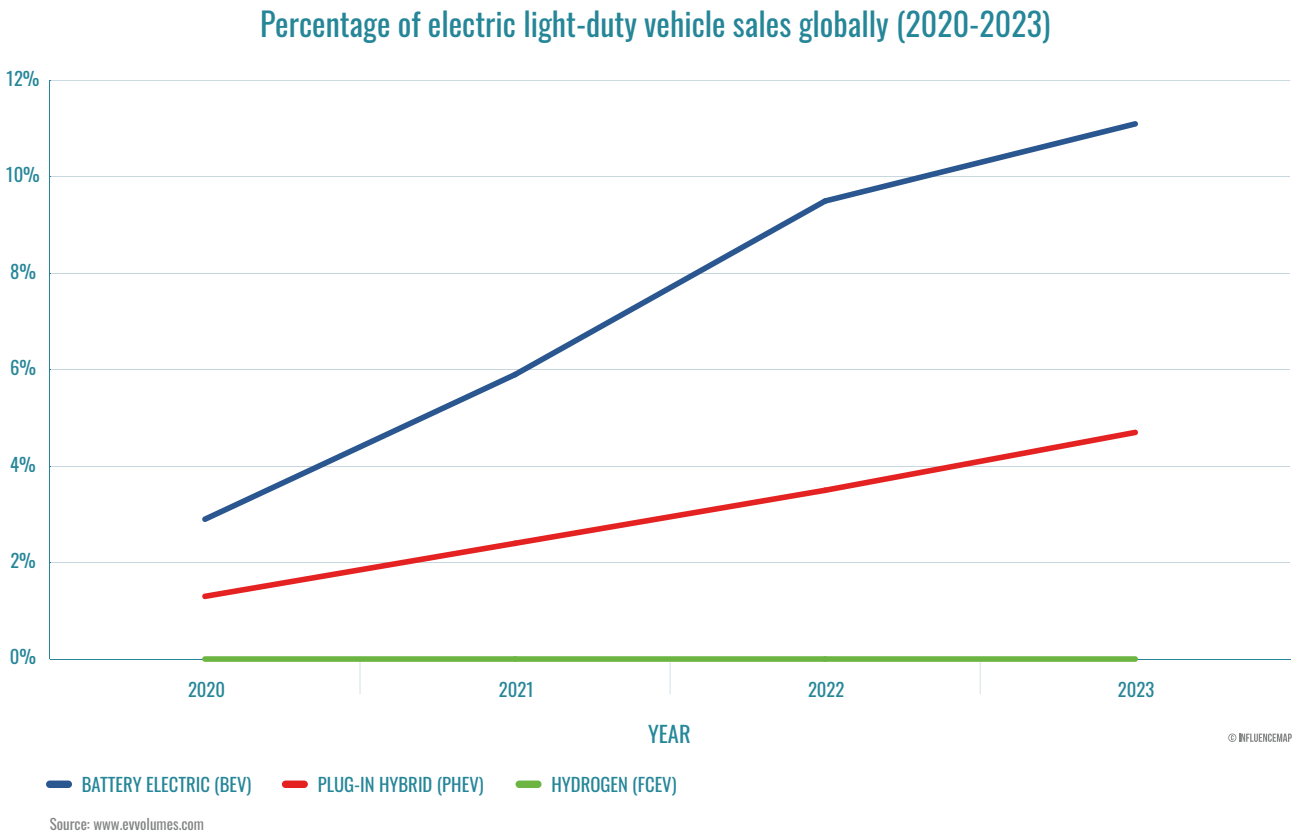
This report summarizes key data and trends from the *freely accessible tool*, which includes full company profiles for all 15 automakers in this report. This report updates the *May 2022 report* that launched the tool.

1.2. Greenhouse Gas Emissions from Global Light-duty Transport

Transport is the *third largest source* of greenhouse gas (GHG) emissions globally, with global GHG emissions from road transport increasing by *15%* from 2010 to 2019, and the majority of transport emissions coming from road vehicles. Following global emissions reductions as a result of COVID-19 in 2020-21, road transport emissions climbed to nearly reach their pre-pandemic peak in 2022, with cars and vans alone contributing to *10%* of energy-related global CO2 emissions that year. Rapidly reducing the climate impacts from the sector is therefore essential for meeting the Paris Agreement's temperature goals.

The need to rapidly decarbonize the automotive sector has sparked major regulatory efforts to promote fuel-efficient and zero-emission vehicles, with battery electric vehicle (BEV) sales increasing globally from 3% in 2020 to 11% in 2023. In contrast, global internal combustion engine (ICE) vehicle sales *peaked in 2017* and have declined every year since, with analysts such as *Bloomberg New Energy Finance (BNEF)* estimating that oil demand for road transport will peak in the late 2020s. However, the global market share of electric vehicles must continue to rapidly increase to align with the *International Energy Agency (IEA)'s Net Zero Emissions by 2050 scenario*, which found that *two-thirds (66%)* of new global light-duty sales must be electric (BEV, FCEV or PHEV) by 2030 to meet a 1.5C global warming target.

Despite growing regulations across the world to decarbonize light-duty vehicles, internal combustion engine-powered vehicles remained the *dominant light-duty technology* for new sales globally in 2023, with private vans and cars responsible for more than 25% of global oil use in 2022. Oil demand from fossil-fueled cars and vans is exacerbated by the rise of heavier, less efficient vehicles, such as SUVs. In 2022, SUVs comprised *46% of global sales*, with notable growth in the US, India, and Europe, contributing almost 1 billion tons of CO2 to the atmosphere. While higher electric vehicle sales have mitigated much of the negative climate impacts of growing SUV sales, SUVs have significantly *slowed global progress* on vehicle fuel efficiency improvements, consuming on average *20% more oil* than a medium-sized non-SUV car.



In many advanced economies, increasing or limited reductions in GHG emissions from transport are threatening climate targets as other key sectors such as power swiftly decarbonize. In the European Union, cars and vans account for *13% of total greenhouse gas emissions*, with transport representing *29% of all EU emissions* in 2022, as compared to only 17% in 1990. While emissions from non-transport sectors in the EU have decreased by 38% since 1990, transport emissions have increased by 25%. Furthermore, *Transport and Environment* estimates that under current climate policies, transport emissions risk growing to 44% of total EU GHG emissions by 2030 as other sectors more rapidly decarbonize, putting European climate targets at risk. Similarly, in the US the transport sector is now the *largest contributor to GHG emissions*.

Automakers themselves are also direct, major contributors to the climate crisis. For example, Toyota, the world's largest automaker in 2022, disclosed in its February 2024 *Sustainability Data Book* that its Scope 3 emissions in 2022 were 575 million tons of CO2, making Toyota potentially responsible for around *1.5% of all global CO2 emissions that year*. In 2019, when Volkswagen was the world's largest automaker, a company *executive revealed* that, according to internal calculations, the company was responsible for 2% of global carbon emissions for that year - roughly the same amount as Germany's countrywide emissions. Moreover, a 2024 study by *Carbon Tracker and Nomisma* found that automakers are "grossly under-reporting" their GHG emissions, calculating a 27% average gap between automakers' declared carbon emissions and independently researched estimates. Major issues also remain with emissions testing rules which automakers have influenced. The EU's *first-ever March 2024 study of real-world CO2 emissions for cars and vans* found that plug-in hybrid CO2 emissions are on average 350% higher than laboratory values, primarily due to them not being charged and driven fully electrically as often as assumed.

1.3 Climate science and decarbonizing road transport

Recently published climate reports from the Intergovernmental Panel on Climate Change (IPCC) and International Energy Agency (IEA) have made increasingly clear findings on how to reduce road transport emissions in line with the Paris Agreement's goal of limiting global temperature rise to well below 2°C, with efforts toward 1.5°C. The section below summarizes these findings.

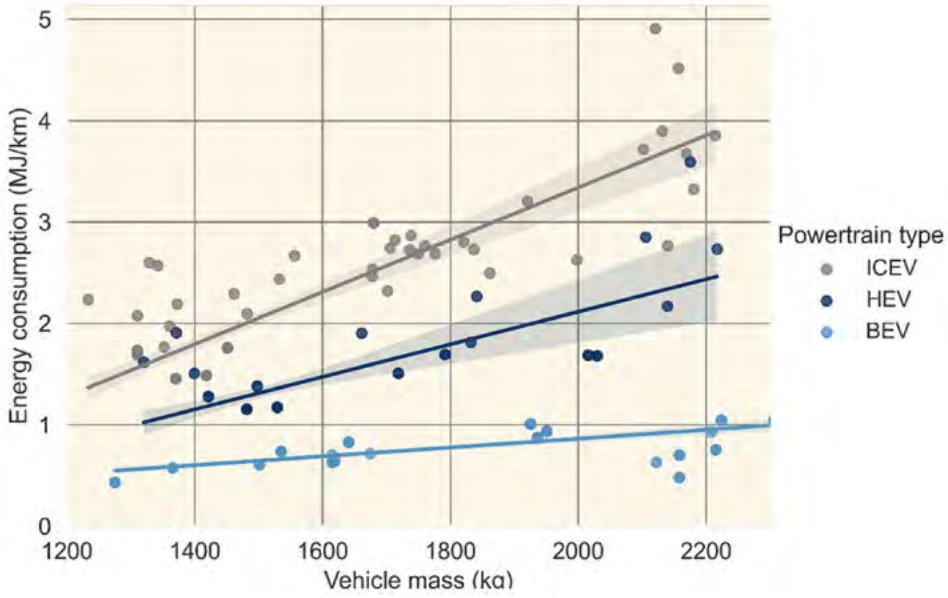
The International Panel on Climate Change (IPCC)

Below is a summary of road transport findings from the *IPCC's Working Group III report* from April 2022.

- **Transport:** The IPCC AR6 WGIII report found that "meeting climate mitigation goals would require transformative changes in the transport sector" (*TS*-67, 2) as CO2 emissions from transport could grow in the range of 16% and 50% by 2050 (*TS*,-68, 23-24), potentially jeopardizing global climate goals as transport emissions have historically grown faster than other sectors.
- **Electric vehicles:** The *Summary for Policymakers (SPM) report* notes that "electric vehicles powered by low emissions electricity offer the largest decarbonization potential for land-based transport, on a life cycle basis (high confidence)" (SPM-41, C.8).
- **Demand-side support for emissions reduction:** The SPM noted that "demand-side options and low-GHG emissions technologies can reduce transport sector emissions in developed countries and limit emissions growth in developing countries" (SPM-41, C.8). The technical summary found that "legislated climate strategies are emerging at all levels of government, and, together with pledges for personal choices, could spur the deployment of demand and supply-side transport mitigation strategies" (TS-69, 22-24).
- **Hybrids:** While recognizing that hybrids can "reduce emissions compared to ICEV by up to 30%, depending on the fuel" and that "PHEVs may provide greater opportunities for use-phase emissions reductions for LDVs [light-duty vehicles]" with their lifecycle emissions between those of their ICEV and BEV counterparts of similar size and performance (10-40, 36-48, 10-41, 1-10). The report further states that because "ICEV, HEV, and PHEV technologies [...] are powered using combustion engines, [they] have limited potential for deep reduction of GHG emissions" (10-43, 25-26), providing only a "suitable temporary solution" to automotive sector decarbonization (10-40, 21-31). As HEVs rely on combustion as the main energy conversion process, they offer limited mitigation opportunities", offering only a "suitable temporary solution". (10-40, 21-31).
- **Biofuels:** The full report found that limited land and biomass resources, accompanied by growing demands for food, feed, and fuels in tandem with the transition away from fossil fuels, has created substantial competition for land and biomass (Box 3, 12, 1304-1306). Consequently, biomass uses need to be prioritized, with the faster-than-anticipated adoption of electromobility for LDVs shifting the debate around biofuels' primary use from land transport to shipping and aviation (4.2.5.8, 10.3.1). Large-scale production, high expansion rates (12.5.3, 1299) and biofuel crop monocultures (6.4.2.6, 645) heighten the risk of land clearing and negative impacts on food security and biodiversity. While such impacts can sometimes be mitigated through climate-smart land use practices (Box 3, 12, 1304-1306), safeguards are needed to limit negative impacts on carbon stocks (7.6.3, 823).

- **Vehicle type:** The full report found that "if the trend towards increasing vehicle size and engine power continues, it may result in higher overall emissions from the LDV fleet (relative to smaller vehicles with the same powertrain technology)" (10-41, 47-48, 10-42, 1). This direct link between higher energy usage and increased weight is highlighted in the figure below.

Figure 2. Energy consumption of internal combustion engine vehicles (ICEV), hydrogen-electric vehicles (HEV), and battery electric vehicles (BEV) of varied masses (WG3, 10.3)



The International Energy Agency (IEA)

In 2023, the IEA released a *2023 update* to its Net Zero Global Roadmap Report to limit the rise in global temperatures to 1.5°C. It detailed the pathways and policies needed to reach net zero by 2050 for the automotive sector, with some of the key light-duty findings highlighted below:

- By 2030, 66% of all new light-duty vehicle sales must be electric (either battery electric, plug-in hybrids, or fuel cell electric vehicles), with zero-emission vehicles comprising 54% of these sales (53.3% battery electric and 0.55% fuel cell electric) and plug-in hybrid vehicles comprising 12.5%.
- Nearly all cars sold globally by 2035 must be electric vehicles, with global transportation emissions needing to decline 90% from 2020 levels through 2050 to reach net zero. Electrification "is the main lever for emissions reductions in road transport," with electric vehicles projected to account for 75% of light-duty sales in advanced economies, and 50% in emerging and developing economies by 2030.
- Regarding government policy, the report notes that "to achieve the emissions reductions required by the NZE, governments also need to move quickly to signal the end of sales of new internal combustion engine cars." Other policies are needed to rapidly electrify light-duty fleets, to encourage modal shifts and more efficient operations and vehicles. The report also noted the importance of policy to promote behavioral changes, including motorway speed limits and phasing-out ICE vehicles in city centers.

Global Climate Regulations on Light-Duty Vehicles

In 2022-24, global policymakers have accelerated the introduction and expansion of climate policies to decarbonize the automotive sector in line with Paris Agreement targets, with over *20 governments* having now set 100% ICE phase-out policies for light-duty vehicles. Major regions, such as the EU and US have also introduced more stringent GHG emissions standards, alongside other ambitious policies like the UK's zero-emission vehicle mandate. A summary of key automotive-sector climate policies for eight key regions that InfluenceMap's LobbyMap database currently or will soon cover for automakers is outlined below.

Figure 3: Key global climate regulations for light-duty vehicles by region

Key Region	Light-Duty Vehicles sold in 2023 (millions[1])	Key regulations in 2023-24	Policy description
China	25.8	Corporate Average Fuel Consumption and New Energy Vehicles	In July 2023, the Ministry of Industry and Information Technology (MIIT) announced the *2023 Amendment* to the 2018 Parallel Point-based Measures for Corporate Average Fuel Consumption (CAFC) and New Energy Vehicles (NEV), which set the target of reducing average fuel consumption to 4L/100km by 2025 and set rules for offsetting emissions surpassing the CAFC standard by new energy vehicles production.
US	15.5	Corporate Average Fuel Efficiency, Greenhouse Gas Standards for Light and Medium Duty Vehicles, Inflation Reduction Act	In March 2024, the US Environmental Protection Agency finalized more stringent GHG emissions standards for *light- and medium-duty vehicles* for model years 2027-32. In July 2023, the National Highway Traffic and Safety Administration (NHTSA) also proposed significantly more ambitious *Corporate Average Fuel Economy (CAFE) standards*. The US currently does not have a binding federal ICE phase-out policy in place. In September 2022 the Biden administration released the *National Blueprint for Transportation Decarbonization*, which set an aspirational goal of achieving a ZEV sales target of 100% for heavy-duty vehicles by 2040, and 50% of light-duty vehicles by 2030. To date, 13 US states have also adopted *Advanced Clean Cars II*, which includes a 100% 2035 zero-emission mandate for new car sales.
European Union	10.5	EU CO2 Standards for Cars and Vans, national ICE vehicle phase-out dates	The *EU CO2 standards for light-duty vehicles* set higher CO2 emission performance standards for cars and vans to reduce GHG emissions from the automotive sector. In March 2023, the EU *formally adopted proposals* to set a 55% reduction target for 2030, and a 100% target for 2035, including a loophole that enables the registration of vehicles running on carbon-neutral fuels after 2035. Additionally, numerous EU member states, such as the Netherlands, Austria, and Denmark, have adopted earlier *2030 ICE-powered vehicle phase-out dates* for cars and/or vans.

1 *https://www.acea.auto/publication/economic-and-market-report-state-of-the-eu-auto-industry-full-year-2022/*

India	4.1	Corporate Average Fuel Efficiency (CAFE) standards, Faster Adoption & Manufacturing of Electric Vehicles	India tightened its *Phase II Corporate Average Fuel Economy standards* for cars in April 2022, increasing the ambition of the target to 113g CO2/km. Alongside this, the Faster Adoption and Manufacturing of Electric Vehicles (FAME) scheme provides financial incentives for electric vehicle purchases and charging infrastructure. In August 2023, the Indian central government *prepared the first draft for FAME III*, with media reports suggesting the policy will be extended to electric trucks, bicycles, and quadricycles.
Japan	4.0	Fuel economy standards, 2035 electrification target, and clean energy vehicle subsidies	Japan has set an average fleet gasoline-equivalent *fuel economy standard of 25.4km/L* by fiscal year (FY)2030. In April 2023, the Japanese government enacted the revised *Act on Rationalizing Energy Use* to accelerate energy conservation efforts, as well as a shift in energy demand from fossil to non-fossil energy sources. The Act includes a 2035 target of 100% electrification in new car sales includes plug-in electric vehicles (PEVs) and ICE-powered hybrids. Additionally, the government provides *Clean Energy Vehicle Subsidies* and an Eco-Car Tax Break to boost new car sales in clean energy cars (BEVs, PEVs, and FCEVs), providing purchase and registration tax exemptions based on vehicles' emission performance and fuel efficiency.
United Kingdom	1.9	2035 ICE phase-out date, zero-emission vehicle mandate	In January 2024, the UK government's *zero-emission vehicle (ZEV) mandate* came into force, requiring automakers to sell an increasing proportion of zero-emission cars and vans. These targets start at 22% of total inventory for cars, and 10% for vans in 2024, increasing year-over-year to reach 80% for cars and 70% for vans by 2030. In September 2023, the UK government *rolled back its previous ICE-phase-out plans*, delaying its initial phase-out date from 2030 to 2035.
South Korea	1.7	GHG emissions standards, fuel efficiency standards, Zero Emissions Vehicle (ZEV) Dissemination policy	South Korea has implemented the *Automobile GHG Emissions Standard* that caps emissions at 70g/km for light-duty vehicles (LDVs) and 146g/km for vans and small cargos by 2030. In addition, South Korea has introduced the *Automobile Fuel Efficiency Standard* of 33.1km/L for LDVs and 17.3km/L for vans and small cargo by 2030. In December 2021, South Korea announced the *Zero Emissions Vehicle (ZEV) Dissemination policy*, which includes incentives for ZEV purchases and charging infrastructure, and a gradual increase in ZEV production targets. In March 2023, the *First Basic Plan of National Carbon Neutrality and Green Growth* outlined a transition to sustainable mobility by 2030. The month after, the *updated Basic Plan* presented the increased provisional target of zero emission vehicle sales to 4.5 million by 2030.
Australia	1.2	New Vehicle Efficiency Standard	In 2023, the *Australian government* proposed the country's first-ever fuel efficiency (CO2) standard. Australia was previously the only OECD country except Russia without mandatory fuel efficiency standards for road transport. In March 2024, the Australian government introduced a bill to parliament for its *New Vehicle Efficiency Standard*. The proposal set CO2 emissions targets of 58g/km in 2029 for passenger vehicles, and 110g/km for light commercial vehicles. The standard is expected to come into effect in July 2025.

Automakers' Recent Engagement on Climate Policy

InfluenceMap maintains the world's only platform analyzing corporate climate policy engagement (LobbyMap), which assesses both companies and the powerful industry groups that they fund. As part of this report, InfluenceMap has assessed the global climate policy engagement of 15 of the world's largest automakers by sales, excluding China-headquartered automakers[2]. The major automakers included are *BMW Group*, *Ford Motor*, *General Motors*, *Hyundai Motor*, *Honda Motor*, *Mazda*, *Mercedes-Benz Group*, *Nissan*, *Renault*, *Suzuki Motor*, *Tata Motors*, *Toyota Motor*, *Tesla*, and *Volkswagen Group*.

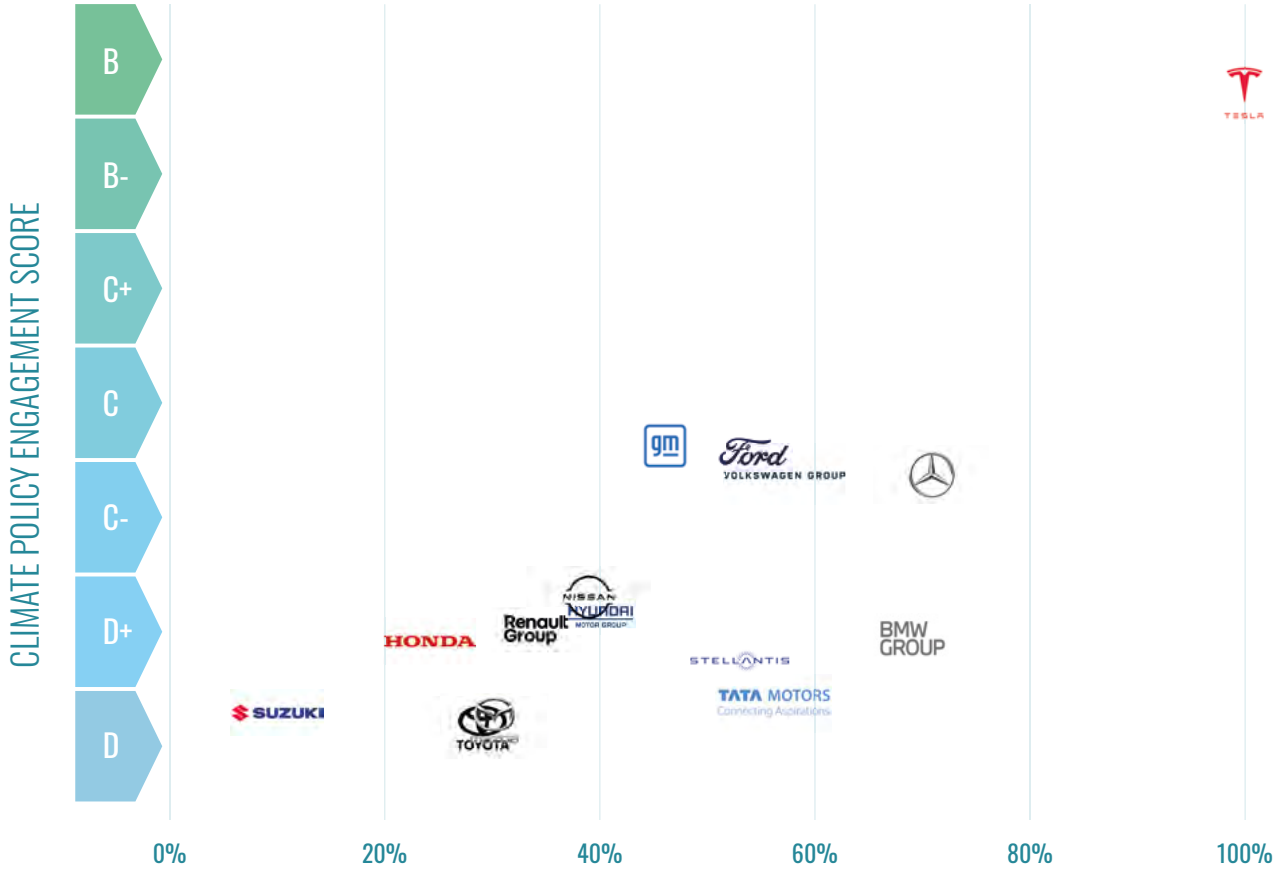
In addition, InfluenceMap has assessed the global climate advocacy of eight key automotive industry associations for this report. These are the *Alliance for Automotive Innovation (US)*, *European Automobile Manufacturers Association (ACEA)*, *Federal Chamber of Automotive Industries (FCAI)*, *German Association of the Automotive Industry (VDA)*, *Japan Automobile Manufacturers Association (JAMA)*, *Korea Automobile & Mobility Association (KAMA)*, *Society of Indian Automotive Manufacturers (SIAM)*, and the *Society of Motor Manufacturers and Traders (SMMT)*. Every automaker analyzed, except Tesla, is a member of at least one of these groups. A full breakdown of automakers and their industry association memberships and their climate policy engagement scores are available in Appendix 1. The key findings are summarized below:

- **Negative automotive industry advocacy remains a key barrier to climate policy and increasing electric vehicle production.** Global automakers are powerful influencers against climate policies required to meet Paris Agreement goals for road transport. 10 of the 15 automakers analyzed fall within a Performance Band of D or D+, indicating global climate advocacy that is misaligned with science-based policy. Toyota, scoring D, remains the lowest-scoring company in this analysis, continuing to lead automotive opposition to climate regulations in multiple regions. For example, in public comments submitted in 2023, Toyota advocated to weaken and/or delay GHG emissions standards in the *US* and *Australia*, zero-emission vehicle mandates in *Canada* and the *UK*, and weaken the *UK* ICE phase-out policy (see Toyota's *LobbyMap profile* for more details). In 2023-24, InfluenceMap research has identified multiple light-duty climate policies globally that have been weakened following industry pressure. This includes the last-minute inclusion of an e-fuels loophole in the *EU's light-duty CO2 standards* in 2023, and the weakening of both *US GHG emission standards* and *Australia's first fuel efficiency standard* in 2024.

2 *Due to methodological difficulties in studying climate policy engagement in China, InfluenceMap has not analyzed the five largest Chinese automakers or climate policy engagement in the region itself, but has outlined key policies in the region.*

- **Laggard automakers remain opposed to regulations that phase out internal combustion engine (ICE) vehicle sales.** The continued sale and use of ICE-powered light-duty vehicles powered by fossil fuels is driving the climate crisis. Automakers continue to advocate against the key climate policies needed to rapidly phase-in electric vehicles at the pace required to meet net-zero targets. Such policies include science-based emissions reductions for light-duty vehicles (GHG and fuel economy standards) and policies requiring higher zero-emission vehicle sales (ICE-phase out dates and ZEV mandates), detailed in the regional sections below. However, more positively, InfluenceMap's automotive analysis has identified evidence of broad industry support for EV incentives, including for purchases and charging infrastructure (such as those in the *EU Alternative Fuels Infrastructure Regulation*), alongside top-line statements supporting the full, long-term electrification of transportation.

Figure 4: Automakers' Climate Policy Engagement Scores and 2030 Electric Vehicle Forecasts



Electric vehicles = combined battery electric, fuel cell electric and plug-in electric vehicles

- **Japanese automakers, led by Toyota, continue to lead negative lobbying efforts against policies to promote battery electric vehicles.** The three lowest-scoring automakers (all scoring D, indicating climate policy engagement that is misaligned with science-based policy) are from Japan (Suzuki, Mazda and Toyota). In 2023-24, InfluenceMap research has found that Japanese automakers have consistently advocated globally to weaken key climate policies promoting zero-emission vehicles, in countries such as *Australia*, the *US* and *India*. Instead, Japanese automakers, led by Toyota, are pushing to promote weaker climate rules that promote a longer-term role for ICE-powered vehicles, including hybrids, in place of the rapid, full electrification of transportation.

- **Tesla leads positive climate policy advocacy in 2023-24.** The highest-scoring company in their climate policy engagement again remains Tesla, scoring B, indicating climate policy engagement that is aligned with science-based policy. In 2023-24, Tesla has actively supported climate rules in regulatory comments, including ambitious GHG emissions standards in *Australia*, *New Zealand* and *the US*, zero-emission vehicle mandates in *Canada* and *the UK*, and ICE-phase out targets in the *UK* and *New Zealand*. Other automakers have also demonstrated leading examples of positive engagement in 2023-24. These include *Ford Motor* in a September 2023 statement opposing the UK government's delay to its ICE phase-out policy from 2030 to 2035, and a May 2023 letter signed by *Ford Motor* (and Volvo Cars, which is not included in this study) opposing an e-fuels loophole in the EU's 100% 2035 CO2 light-duty vehicle target. Leading electric vehicle production forecasts from BMW and Mercedes-Benz also suggest a future opportunity to positively reform their climate policy engagement strategies in alignment with their relative advantage in electric vehicle development.

- **Automotive industry associations are driving opposition to climate regulation.** Automakers continue to employ their industry associations to aggressively push back on ambitious climate rules globally. For example, in the US, the *Alliance for Automotive Innovation* has led opposition to stringent *fuel economy (CAFE)* and *GHG emissions standards* for light-duty vehicles, while in Australia, the *Federal Chamber of Automotive Industries (FCAI)* led a strategic campaign to weaken fuel efficiency (CO2) standards. However, industry associations' active, negative climate policy engagement appears misaligned with some member companies. For example, in March 2024 both *Tesla* and *Volvo Cars subsidiary Polestar* left the FCAI, making public statements critical of the FCAI's advocacy campaign against Australia's fuel efficiency standards, while Volkswagen *resigned* from the FCAI's policy committee in protest. Of the 8 auto industry associations included in this study, every automaker (except Tesla) is a member of at least two of these groups, with most automakers holding membership in at least 5 of these associations. A full breakdown of these memberships is available in Appendix 2.

- **Automakers' disclosures on their climate policy engagement are improving but still not meeting investor expectations.** InfluenceMap is a research partner to the Climate Action 100+ (CA100+) network, an investor-led initiative to ensure the world's largest corporate GHG emitters take necessary action on climate change. 11 of the 15 global automakers featured in this study are CA100+ focus companies which investors engage with to improve their climate policy engagement and disclosure on their industry association memberships. Since *InfluenceMap's May 2022 study*, 7 out of 11 CA100+ automakers have now published annual industry association disclosures, compared to only 5 before the study's release. However, InfluenceMap assessments have found that, to date, no automaker has fully met investor expectations around disclosure transparency. The disclosure scorecards are *available here*.

Regional engagement on climate policies

InfluenceMap assesses corporate engagement on global automotive climate policies in real-time, with *live policy pages* from key regions available on the Automotive Climate Tool website. InfluenceMap also produces *numerous reports and newsletters* analyzing advocacy trends in specific regions. This section summarizes key findings from this research for light-duty automakers, organized by region.

United States, Part 1: The Alliance for Automotive Innovation (the Alliance), an industry group representing 12 of the 15 major automakers analyzed for this report (excluding Renault, Suzuki and Tesla), drove opposition to US GHG emission standards. Despite receiving billions in federal funding from the Inflation Reduction Act and Infrastructure Investment and Jobs Act for electric vehicles, the auto industry demonstrated widespread opposition in 2023-24 against more ambitious GHG light-duty emissions standards. In regulatory comments on the rule, the *Alliance* advocated to significantly reduce the ambition of the standards and questioned the EPA's legal authority to enact the rule. In similar comments, Japanese and Korean automakers *Toyota*, *Hyundai*, *Nissan*, and *Mitsubishi* advocated to significantly reduce the rule's ambition of the rule, supported numerous flexibilities to weaken the proposal's stringency and pushed to include plug-in hybrid vehicles (PHEVs) in zero-emission vehicle adoption targets. *Honda* opposed all proposed alternatives in favor of weaker regulation with more flexibility, while *Mazda* advocated reducing the regulation's stringency and for ZEV adoption targets to include plug-in hybrids. US manufacturer *General Motors* advocated for a significantly less ambitious rule that would reduce the EPA's proposed 60% EV sales share to 50% by 2030. Other manufacturers such as *BMW*, *Mercedes-Benz*, *Stellantis*, *Volkswagen* and *Jaguar Land Rover (Tata Motors)* also advocated to reduce the ambition of the GHG emissions rule. More positively, *Ford* supported the 2032 endpoint of the EPA proposal, while favoring the less ambitious Alternative 3 option with fewer cumulative emissions reductions. Most positively, *Tesla* supported rules even stronger than the more ambitious Alternative 1 proposal. Ultimately, significant advocacy from *automakers and oil producers* (alongside *unions*) appears to have led the EPA to weaken the *final March 2024 rule*, including delaying the most significant emissions cuts to 2030-2032 as opposed to a stronger start previously proposed.

United States, Part 2: Automakers advocated against proposed fuel economy (CAFE) standards, and ten automakers supported the Alliance for Automotive Innovation's negative position. In the *Alliance*'s comments on the proposal, the association called the standards infeasible, advocated to lower the ambition of the standards and pushed for further flexibilities such as off-cycle and A/C credits that weaken the emissions reduction potential of the policy. *BMW*, *Honda*, *Hyundai*, *Jaguar Land Rover* (Tata Motors), *Mitsubishi*, *Nissan*, *Stellantis*, *Subaru*, *Toyota*, and *Volkswagen* along with its subsidiary *Porsche*, all advocated to significantly reduce the targets of the proposed CAFE standards and explicitly supported the comments of the Alliance. *General Motors* and *Ford* also advocated to weaken key components of the standards, without explicitly endorsing the recommendations of the Alliance. By contrast, *Tesla* supported increases in the ambition of the proposed CAFE standards to rapidly electrify the automotive sector.

Figure 5: Summary of positions on selected global light-duty vehicle climate policies since June 2022

	US	US	EU	Australia
Automaker	*US Light-Duty federal GHG emissions standards*	*Corporate Fuel Economy (CAFE) standards*	*EU Light-Duty CO2 standards for 2030 and 2035*	*Australia fuel efficiency (CO2) standard*
BMW Group				
Ford Motor				
General Motors				
Honda Motor				
Hyundai Motor				
Mazda				
Mercedes-Benz Group				
Nissan				
Renault				
Stellantis				
Suzuki Motor				
Tata Motors				
Tesla				
Toyota Motor				
Volkswagen Group				

Table Key

NEGATIVE Evidence of opposition to policy

MIXED Positive and negative positions across multiple instances of engagement

N/A No evidence of engagement found

POSITIVE Evidence of support for policy

European Union: The 2035 100% EU CO2 reduction target for cars and vans was weakened following auto sector lobbying. Despite having reached an ambitious provisional agreement in October 2022 that included a 2035 zero-emission CO2 target, in March 2023, the EU approved the policy with an exemption for internal combustion engine (ICE) vehicles that run on "CO2 neutral fuels" to continue after 2035. The compromise weakened the policy's original ambition following last-minute lobbying from Germany and the automotive industry (see InfluenceMap's *EU Light Duty Vehicles CO2 targets* policy page). According to multiple sources, including a March 2023 *Automotive News article*, the "e-fuels" exemption appears to have been supported by Porsche, a subsidiary of Volkswagen. The *German Association of the Automotive Industry (VDA)* also appeared to support weakening the policy. More positively, *Ford Motor* and *Volvo Cars* both publicly opposed the e-fuel exemption in a March 2023 joint letter and called for a firm 2035 zero-emissions target for cars and vans.

United Kingdom, Part 1: Many automakers pushed to weaken and delay the UK's zero-emission vehicle (ZEV) mandate, without explicitly opposing the policy. New InfluenceMap analysis of May 2023 consultation responses from the UK's ZEV mandate, obtained through Freedom of Information (FOI) requests, discovered that while there was no direct opposition to the mandate, many automakers and industry associations advocated to weaken the regulation. *Toyota*, *Stellantis*, *Honda*, and *Ford*, alongside the *Society of Motor Manufacturers and Traders (SMMT)* and the *Japanese Automobile Manufacturers Association (JAMA)*, pushed for 2024 to be a monitoring year only, effectively delaying the mandate's introductory date. However, such calls for delay were eventually rejected by the UK government, which formally introduced the ZEV mandate in January 2024. Of these groups, the SMMT and Honda also stressed numerous concerns with the central car trajectory for 2024-29, while Toyota explicitly advocated for a weaker trajectory. Stellantis, JAMA, Nissan and Ford appeared to support the proposed trajectory with the exception that numerous flexibilities were included, including delaying the policy's effective start date. The proposed ZEV mandate's trajectory for cars was supported with exceptions, including pushing for numerous flexibilities to weaken the proposal's stringency, by *Jaguar Land Rover (Tata Motors)*, *Volkswagen*, *Renault* and *BMW*. Regarding the ZEV mandate 2024-29 trajectory for vans, *Jaguar Land-Rover (Tata Motors)*, *Renault*, *JAMA*, *Ford* and the *SMMT* all pushed for a weaker trajectory, while *Toyota* stressed that 2024 should be a monitoring-only year. By contrast, *Tesla* pushed for a higher trajectory for both car and van ZEV sales, while *Kia (Hyundai)* supported the proposed trajectory for vans.

United Kingdom, Part 2: Toyota and Jaguar Land Rover (Tata Motors) welcomed delays to the UK government's proposed ICE-phase out date, while Ford pushed back. Following the September 2023 announcement to delay the UK's initial ICE phase-out plans from 2030 to 2035, *Toyota* stated it "welcomed the move" and *Jaguar Land Rover (Tata Motors)* praised the delay as "pragmatic" in public statements reported by AutoCar. By contrast, a *Ford Motor* statement reported by Sky News positively advocated against the delay, supporting the original 2030 target. Days after the policy rollback, Nissan announced plans to only sell BEVs in Europe by 2030, with the Guardian reporting a *Nissan* CEO speech that stated "there's no going back [...] the world needs to move on from internal combustion engines".

Australia: The Federal Chamber of Automobile Industries (FCAI) led negative advocacy against the Fuel Efficiency Standard, supported by key Japanese automakers. An InfluenceMap May 2023 *report* found that the FCAI led a strategic, coordinated campaign to push back against Australian automotive policy to lock-in weak fuel efficiency rules that are significantly less ambitious than similar international policies. Following this, InfluenceMap analysis of the May 2023 Australian consultation on Fuel Efficiency Standards (*available here*) found that the *FCAI* continued to lead opposition to an ambitious standard, alongside its board members *Mazda* and *Toyota,* and the *Japanese Automobile Manufacturers Association (JAMA).* All four groups advocated the inclusion of multiplier, off-cycle, and air conditioning credits that would weaken the policy, and pushed back against ambitious CO2 reduction targets. By contrast *Tesla* (alongside *Polestar (Volvo Cars)* and the *Electric Vehicle Council)* supported stringent CO2 emissions standards in line with similar regulations in New Zealand, the EU and the US, and pushed back against the widespread use of credits. Following the Australian government's February 2024 *announcement* to introduce stringent fuel efficiency (CO2) standards that would align with the US by 2028, ABC News reported that both *Hyundai*, its subsidiary Kia, and *Volkswagen* supported the proposed standards, while the *FCAI* opposed the rules in a March 2024 consultation response. In response, Tesla left the FCAI in March 2024, *citing concerns* that the FCAI had deceived customers on the CO2 standards. At the end of March 2024, the Australian government announced *legislation* for the standard, weakening its previous proposal, including through introducing less ambitious early CO2 targets for light commercial vehicles and delaying credits and penalties until July 2025.

Japan: The Japanese automotive sector has broadly opposed Paris-aligned climate legislation, with negative advocacy led by the Japan Automobile Manufacturers Association (JAMA). JAMA continued to have strategic, negative engagement with Japanese automotive policy in 2023-24. In a *meeting with the Prime Minister*, a November 2022 JAMA blog noted that JAMA's former chair, and current Toyota chairman, Akio Toyoda, advocated for an extended role for ICE-powered hybrid vehicles, suggesting that it led to the Japanese government to not support ZEV targets at G7 summit. In a May 2023 *Public-Private Consultative Meeting* with the Ministry of Economy, Trade and Industry (METI), JAMA also supported e-fuel development along with battery EVs, fuel cells, and "carbon neutral" fuels. During hydrogen fuel cell strategic meetings throughout May-June 2023, *Honda* and *Toyota*, both JAMA members, also advocated to METI to expand hydrogen in road transport without taking a clear position on decarbonizing hydrogen. In a *press statement* during the May 2023 G7 meeting, a JAMA vice chair representing Honda appeared to push back against stringent climate regulation. In a November 2023 *media conference*, then chairman for JAMA, Akio Toyoda, advocated against policy to fully electrify light-duty vehicles and to phase-out ICE-powered vehicles. JAMA's new chair, and Isuzu Motor's Chairman, Masanori Katayama continued to advocate for a longer-term role for internal combustion engines in a "multi-pathway" approach over widespread electrification in a January 2024 *statement*. In 2023, unlike other similar national industry associations, JAMA also actively pushed back on ambitious GHG emissions standards *in multiple other regions beyond Japan*, including in the *EU* and *Australia*.

South Korea: The Korea Automobile & Mobility Association (KAMA) opposed the Zero Emissions Vehicle (ZEV) Dissemination policy and phasing out ICE vehicles in South Korea in 2021-22 but appears to have more positively changed its position towards a ZEV transition since December 2022. InfluenceMap *analysis* published in March 2023 found that KAMA's former chairman had opposed numerous South Korean climate policies for road transport in 2022, including the *2035 ICE vehicle ban pledge* and the *low-emission vehicle supply policy*. However, since December 2022, the association has stated general support for a ZEV transition in Korea, including the *expansion of EV manufacturing facilities and subsidies on EV purchases*. KAMA also *supported* the enactment of the *Future Vehicles Special Act,* which supports automobile parts manufacturers to transition their operations towards EV production. InfluenceMap has not found any direct, recent policy engagement in South Korea from global automakers operating there, including Hyundai Motor Group, Renault, and General Motors.

India: Indian automakers are leading positive engagement on battery electric vehicles while Japanese automakers, led by Maruti Suzuki (Suzuki), push for policies favoring ICE-powered vehicles, including hybrids. InfluenceMap's *March 2024 report on automaker engagement in India* found that communications from Indian automakers Tata Motors (and Mahindra and Mahindra) were widely supportive of battery electric vehicles in India. In contrast, Japanese automakers, led by Maruti Suzuki (Suzuki), including Honda and Toyota, consistently promoted ICE-powered hybrids over battery electric vehicles in their advocacy. The analysis found negative engagement on India's fuel economy (CAFE) standards from *Maruti Suzuki (Suzuki)* in 2022 to weaken the policy. However, the report also found widespread automaker support to extend the Faster Adoption and Manufacturing of Electric Vehicles (FAME) scheme in 2023-24, which provides incentives for electric vehicle purchases, including from the *Society of Indian Automobile Manufacturers (SIAM)*, *Maruti Suzuki* and *Tata Motors* (alongside *Mahindra & Mahindra*). Regarding other policies, a January 2024 Economic Times article reported that *Toyota* had advocated to reduce the Goods and Services (GST) tax on ICE-powered hybrid purchases, with other evidence suggesting that *Maruti Suzuki* and *Honda* had pushed for similar tax reductions in 2022. By contrast, a January 2024 Reuters article reported that *Tata Motors* and *Hyundai* (alongside *Mahindra & Mahindra)* had pushed back on reducing ICE hybrid taxes, instead favoring policies promoting BEVs.

Other regions: InfluenceMap has also found recent policy engagement evidence in **Canada**. In a March 2023 consultation on Canada's proposed zero-emission vehicle (ZEV) mandate, both *Toyota* and *Nissan* strongly opposed the ZEV mandate, and pushed for numerous flexibilities that would weaken the proposal's stringency, while *Mercedes-Benz* emphasized multiple concerns and advocated for flexibilities that would weaken the mandate's goals. By contrast, *Tesla* positively supported higher ZEV mandate targets for the rule.

Figure 6: Automakers' key industry associations and recent climate advocacy examples

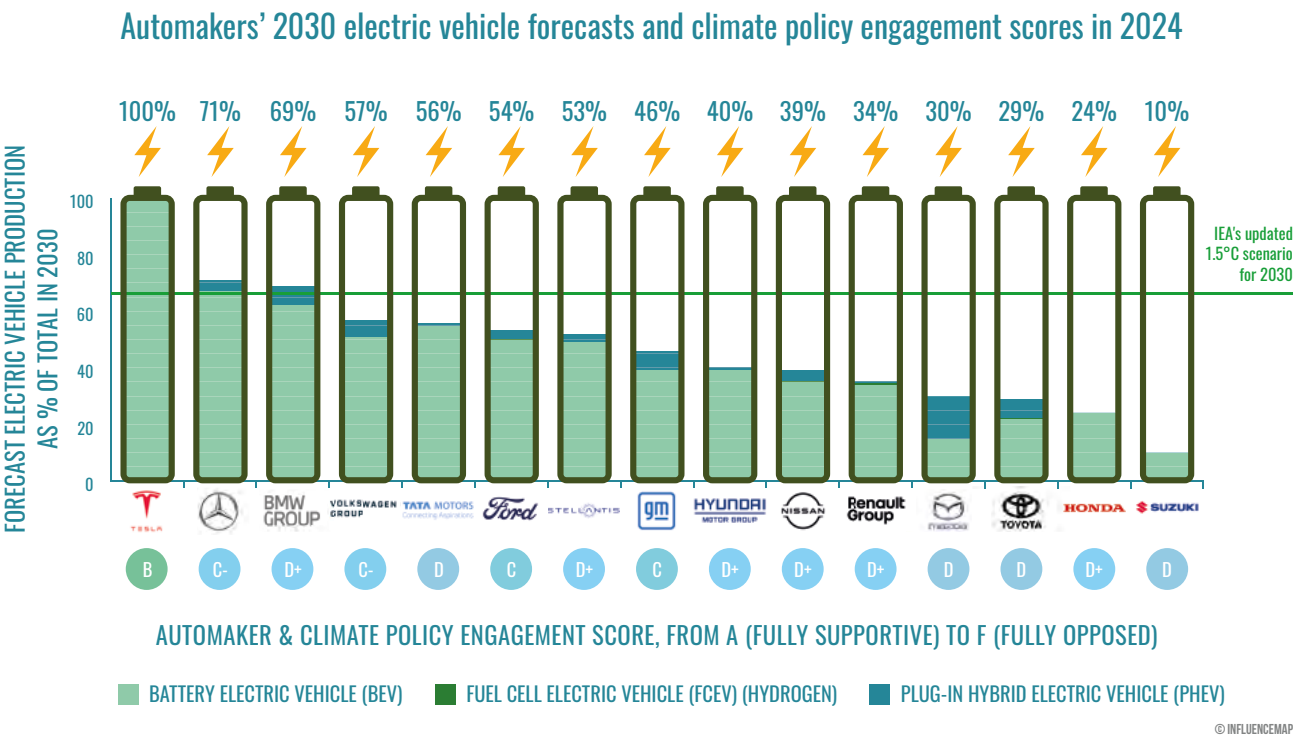
Industry Association	Performance Band	Region	Examples of recent engagement
Society of Motor Manufacturers and Traders (SMMT)	C	UK	**September 2023:** In a *parliamentary enquiry* response, SMMT supported policies to ensure a 100% decarbonized UK energy grid by 2035 **September 2023:** In a *press release*, SMMT's CEO appeared to advocate against the UK government delaying its phase-out date from 2030 to 2035 **May 2023:** In a *consultation response*, SMMT advocated to delay the UK's upcoming zero-emission vehicle mandate by pushing for 2024 to be a monitoring year only
European Automobile Manufacturers Association (ACEA)	C-	EU	**April 2023:** In a *press release*, ACEA called for higher ambition in the EU's Alternative Fuels Infrastructure Regulation (AFIR) **January 2023:** In an *open letter to EU policymakers*, ACEA's President was unsupportive of the EU's 2035 100% CO2 target for light-duty vehicles
Federal Chamber of Automotive Industries (FCAI)	D+	Australia	**March 2024:** In a *consultation response*, FCAI opposed Australia's proposed CO2 standards and advocated to severely weaken the stringency of the proposed rule **May 2023:** In a *consultation response*, FCAI advocated for numerous exceptions in Australia's Fuel Efficiency (CO2) Standard that would weaken the policy
Society of Indian Automobile Manufacturers (SIAM)	D	India	**August 2023:** In a *public statement*, SIAM's Director pushed for the use of biofuels as a vehicle decarbonization pathway in India **July 2023:** In comments reported by *Business Today*, SIAM's Director advocated to extend the FAME scheme to increase EV penetration rates **April 2023:** In comments reported by *Energy World*, SIAM's President *supported* the use of alternative fuels such as compressed natural gas (CNG) for road transport
Alliance for Automotive Innovation	D	US	**October 2023:** In *regulatory comments*, the Alliance raised legal concerns over implementation and advocated to weaken CAFE standards **July 2023:** In *regulatory comments*, the Alliance advocated to reduce the ambition of proposed GHG emissions standards for light-duty vehicles and questioned the EPA's authority to enact the rule

Japanese Automobile Manufacturers Association (JAMA)	D	Japan	**May 2023:** In G7 *media comments*, JAMA vice chairs stressed that climate regulations on certain technologies will "hinder technological advancement" **May 2023:** In a *consultation response*, JAMA advocated to delay the UK's upcoming zero-emission vehicle mandate by pushing for 2024 to be a monitoring year only **November 2023:** At a *media conference*, JAMA's chair opposed policy to fully electrify light-duty vehicles and to phase-out ICE-powered vehicles
German Association of the Automotive Industry (VDA)	D	Germany	**May 2023:** In a *consultation response*, VDA opposed the EU's proposed CO2 emission standards for heavy-duty vehicles **March 2023:** In a *press release*, VDA President called for greater ambition in the EU's Alternative Fuels Infrastructure Regulation (AFIR) **February 2023:** In a *press release*, VDA made last-minute attempts to weaken the EU's 2035 zero-emissions target for light-duty vehicles
Korean Automobile Manufacturers Association	E	South Korea	**December 2023:** In a *press release*, KAMA's Chairman supported the "Future Vehicles Special Act" to assist auto parts manufacturers transitioning towards EVs **September 2023:** In comments reported by *Energy Daily*, KAMA supported government plans to expand EV purchase subsidies and the EV distribution goal **August 2022:** In comments reported by *Asiae*, KAMA's Chair advocated for policies to weaken the K-ETS (Emissions Trading Scheme)

Industry Forecasts and Climate Policy Engagement on Electric Vehicles

This section outlines key insights from InfluenceMap's analysis of S&P Global Mobility data from automakers' light-duty vehicle forecasted production until 2030 from a February 2024 dataset. This is broken down by vehicle type (e.g. SUVs) and technology (e.g. hybrids) and compared with the IEA's updated 1.5°C scenario on electric vehicle sales. The full interactive dataset, including for individual automakers, is available on the *Automotive Climate Tool website*.

- **Electric vehicle production forecasts are not keeping pace with the IEA's 1.5°C scenario despite increasing since 2022.** The *IEA's updated 1.5°C scenario*, released in September 2023, found that 66% of all light-duty vehicle sales globally must be electric vehicles (including vehicles that are battery electric (BEVs), fuel cell hydrogen (FCEVs) and plug-in electric (PHEVs) by 2030 to meet net zero by 2050. InfluenceMap analysis of S&P Global Mobility data from February 2024 finds that only 44% of global light-duty vehicles produced are set to be battery-electric, with another 9% PHEVs, and 0% fuel-cell hydrogen (FCEV), for a total of



53% electric vehicles in 2030. Only Tesla, Mercedes-Benz and BMW appear aligned with a 1.5°C global target for their own electric vehicle production. This is despite higher forecasted electric vehicle production for all automakers analyzed since InfluenceMap's 2022 report.

- **Automakers further behind in the transition to electric vehicle production demonstrate the most negative climate policy engagement.** This updated analysis has identified a clear trend between automakers that are forecasted to have the lowest percentage of electric vehicles produced in 2030, and the most negative advocacy to delay and weaken climate policies for the sector. For example, the three automakers with the lowest forecasted 2030 electric vehicle production (Mazda, Suzuki and Toyota) all receive the lowest Performance Band scores of D. Such findings highlight the connection between automakers' internal electric vehicle production plans and their external climate policy engagement strategies.

- **Japanese automakers continue to be the least prepared for the electric vehicle transition - and are lobbying hardest to slow it down.** The four automakers with the lowest proportion of forecasted electric vehicle production in 2030 are all from Japan (Suzuki at 10%, Honda at 24%, Toyota at 29% and Mazda at 30%). Mazda, Suzuki, and Toyota also receive a LobbyMap Performance Band score of D, indicating climate policy engagement that is misaligned with science-based policy. Such data is in line with other recent studies highlighting how Japanese automakers are global laggards in their transition plans to produce more electric vehicles[3] and are instead pushing for a longer-term role for ICE-powered hybrids fuelled by fossil fuels.

- **Automakers who have committed to ambitious battery electric vehicle plans remain the most positive climate lobbyists.** InfluenceMap's updated research continues to find a strong positive correlation between automakers forecasted to produce a greater proportion of battery electric vehicles and positive advocacy on global climate regulations. Leading automaker Tesla is forecast to continue selling solely battery electric vehicles in 2030, and in 2023-24 had by far the most positive climate policy engagement of all automakers analyzed.

- **Increasing SUV and light truck production remains a growing problem to the decarbonization of road transport, including for electric vehicles.** The shift towards larger and less fuel-efficient ICE-powered vehicles has led to significantly higher CO2 emissions, with the IEA estimating that the oil consumption of SUVs accounted for *one-third of total growth in global oil demand* between 2021 and 2022. SUV and light-commercial vehicle production are forecasted to rapidly increase from a combined 57% of global light-duty production in 2020 to 64% in 2030. Every single automaker analyzed, except Tata Motors, is also forecasted to produce a higher combined proportion of SUVs & light commercial vehicles by 2030 compared to 2020, with the production of such vehicles typically generating *higher per-unit profit margins* than smaller, less polluting vehicles. Rising SUV and light-truck sales will negate some of the emissions reductions from battery-electric vehicle sales, as larger and heavier vehicles generally require more energy both to *manufacture and operate*. Evidence also suggests that automakers continue to influence global automotive regulations that promote higher SUV and light-truck sales. For example, in Australia, automakers have rapidly increased sales of SUVs and light trucks (accounting for nearly 80% of all sales in 2023, compared to *47% in 2013*), while

3 *For example, the International Council on Clean Transportation's Global Automaker Rating, May 2023*

sales of passenger cars have declined from *50% to 17% of all vehicles sold* in the same period. This follows a trend of Australian automakers increasing their *advertising spend on SUVs and light trucks by 200%* from 2011-21 while reducing their spending on passenger car advertisements by 55%. Following this, in 2023-24, the Australia-based industry group, FCAI, actively *opposed* including large SUVs in proposed "passenger car" fuel efficiency (CO2) targets in a consultation response. Instead, it pushed for large SUVs to be re-categorized as "light commercial vehicles," a category with significantly weaker CO2 targets, promoting rules that would likely *incentivize* the sale of larger, more polluting vehicles over smaller, more efficient cars. Following such advocacy, the Australian government *recategorized* a small subset of larger SUVs (4WDs) from "passenger cars" to "light commercial vehicles" as part of the final fuel efficiency (CO2) standards legislation.

- **A slower transition to electric vehicles will lock in higher oil demand and threaten global climate targets.** Without a rapid growth in electric vehicle sales, ICE-powered vehicles will continue to drive global oil demand, fueling the climate crisis and locking in high emissions during their working lifetime, with the average age of EU passenger vehicles reaching *12 years old*. Consequently, the low electric vehicle production forecasts for many automakers further highlight the importance of global regulatory action in driving emissions reductions for the sector, and the major climate risks if the automotive industry successfully lobbies to weaken such rules.

Appendices

Appendix 1: Automotive Climate Tool profile links and related data (as of May 2024)

Company & Link to Automotive Climate Tool Profile (May 2024)	Performance Band	Organization Score	Relationship Score	Engagement Intensity	Forecasted electric vehicle production in 2030 (as a % of their global production)
Tesla	B	72%	83%	33%	100%
Ford Motor	C	69%	50%	51%	54%
General Motors	C	67%	53%	49%	46%
Volkswagen Group	C-	64%	54%	62%	57%
Mercedes-Benz Group	C-	62%	54%	31%	71%
Nissan	D+	55%	54%	37%	39%
BMW Group	D+	51%	57%	45%	69%
Hyundai Motor	D+	53%	54%	39%	40%
Honda	D+	52%	53%	37%	24%
Renault	D+	53%	53%	35%	34%
Stellantis	D+	52%	50%	28%	53%
Tata Motors	D	47%	54%	28%	56%
Suzuki	D	43%	56%	21%	10%
Mazda	D	47%	51%	24%	30%
Toyota	D	45%	52%	41%	29%

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Appendix 2: Automaker's global industry association memberships (May 2024)

Table Key

Member of Industry Association

Not a member of industry association

Industry Association	*Society of Motor Manufacturers and Traders (SMMT)*	*European Automobile Manufacturers Association (ACEA)*	*Federal Chamber of Automotive Industries (FCAI)*	*Society of Indian Automobile Manufacturers (SIAM)*	*Alliance for Automotive Innovation*	*Japan Automobile Manufacturers Association (JAMA)*	*German Association of the Automotive Industry (VDA)*	*Korean Automobile & Mobility Association*
Region	UK	EU	Australia	India	US	Japan	Germany	South Korea
Performance Band	C	C-	D+	D	D	D	D	E
BMW Group	■	■	■	■	■		■	
Ford Motor	■	■	■		■		■	
General Motors					■			■
Honda Motor	■	■	■	■	■	■		
Hyundai Motor	■	■	■	■	■			■
Mazda	■		■		■	■		
Mercedes-Benz	■	■	■	■	■		■	
Nissan	■	■	■	■	■	■		
Renault	■	■		■				■
Stellantis	■		■	■	■		■	
Suzuki Motor			■	■		■		

Industry Association	Society of Motor Manufacturers and Traders (SMMT)	European Automobile Manufacturers Association (ACEA)	Federal Chamber of Automotive Industries (FCAI)	Society of Indian Automobile Manufacturers (SIAM)	Alliance for Automotive Innovation	Japan Automobile Manufacturers Association (JAMA)	German Association of the Automotive Industry (VDA)	Korean Automobile & Mobility Association
Tata Motors								
Tesla								
Toyota Motor								
Volkswagen Group								