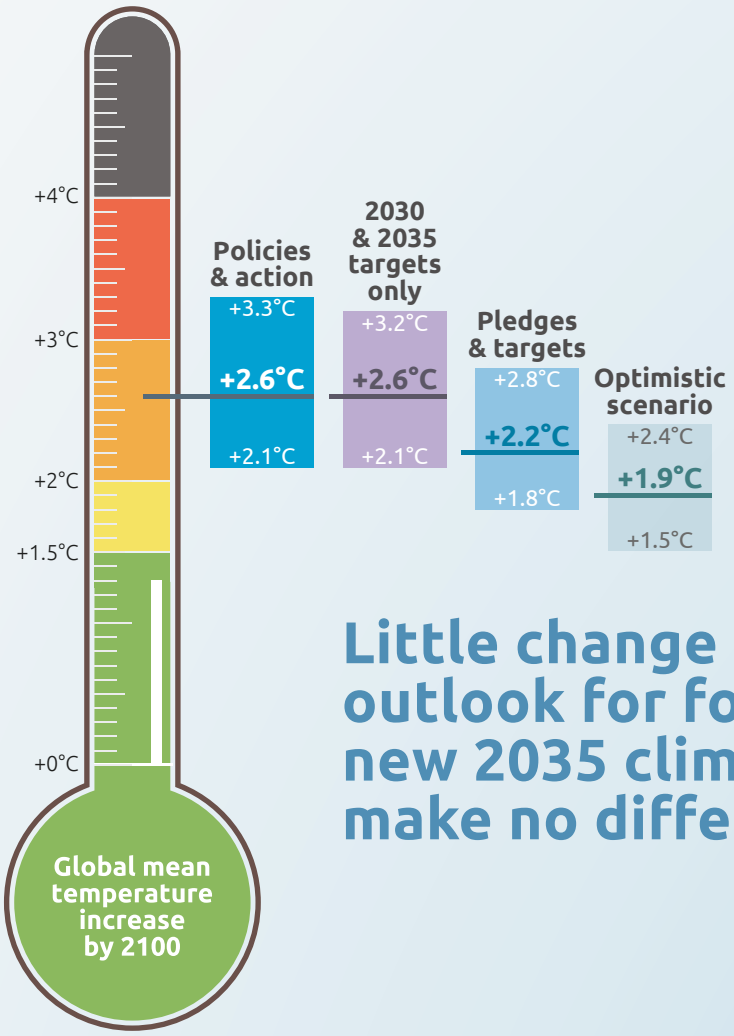
Climate Action Tracker




# Little change in warming outlook for four years; new 2035 climate targets make no difference

Climate Action Tracker

# Warming Projections Global Update

November 2025

CLIMATE ANALYTICS

NEW CLIMATE INSTITUTE

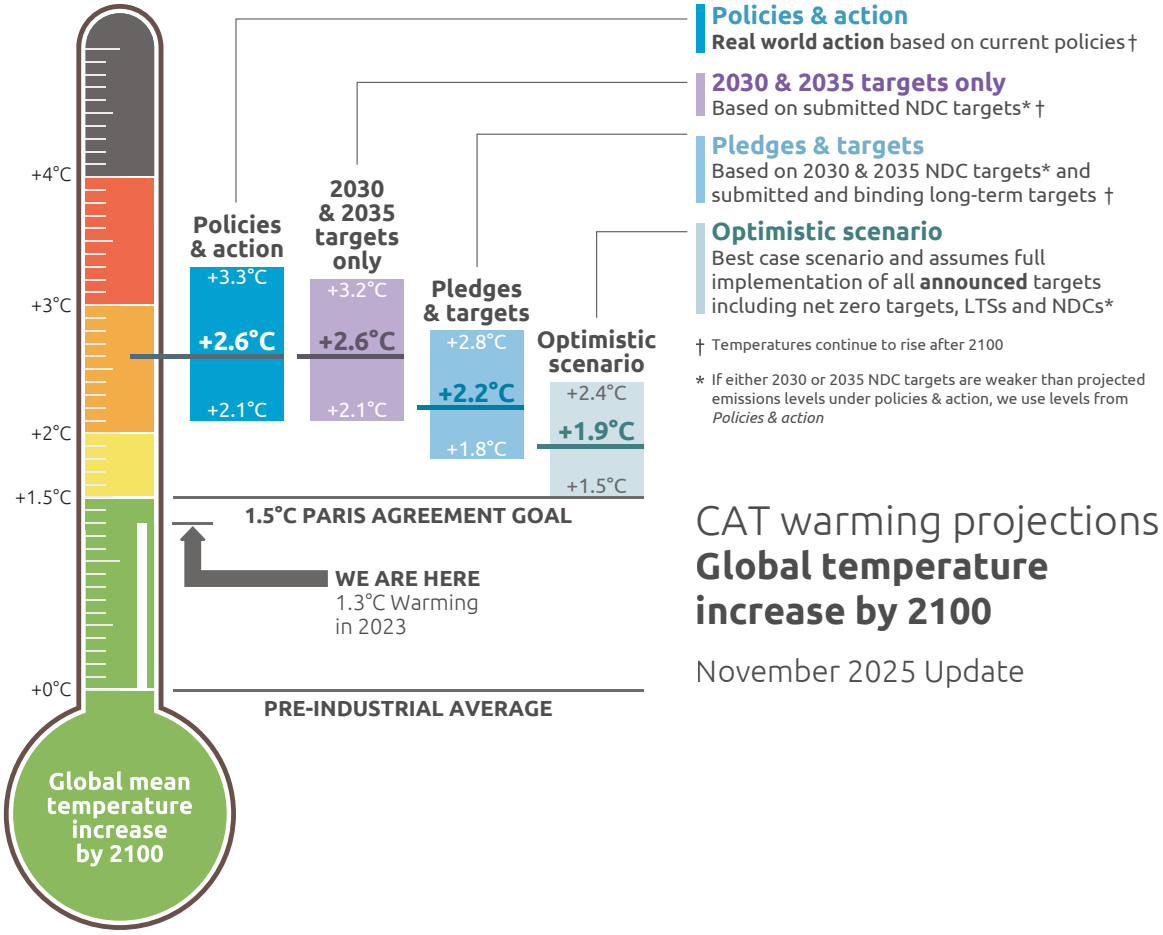
IESR Institute for Essential Services Reform

# Summary

Ten years after the Paris Agreement, the world stands at a critical juncture in the fight against climate change, with **little to no measurable progress in the CAT's warming projections, now for the fourth consecutive year**.

**Almost none of the 40 governments the CAT analyses have updated their 2030 target, which is critical to keep warming levels below 1.5°C**, nor have they set out the kind of action in new 2035 targets needed to change course.

As a result, the temperature projection for our **"2030 and 2035 targets scenario",** the one estimating impact of submitted climate targets (NDCs) to date**, remains at 2.6°C, the same as last year. In other words, the 2035 NDCs so far submitted don't change the dial in terms of keeping warming to 1.5˚C.**




The longer we wait, the larger the "target gap": from 2030 to 2035, the **gap between climate targets and the pathway to 1.5°C is projected to grow by 2 billion tonnes**, up from 29 $GtCO_2e$ in 2030 to 31 $GtCO_2e$ in 2035.

Major emitters China and the EU have failed to propose targets that change their course significantly.

**Worse, the US rolled back climate policies**, sought to undermine global climate action, most recently at the International Maritime Organisation, and is withdrawing from the Paris Agreement.

Warming under governments' policies and climate action – the CAT's "current policies scenario" – **has seen a small 0.1°C drop, from 2.7°C to 2.6°C**, but this is largely due to a CAT methodological update to extend and better reflect China's emissions pathways to 2100, rather than new and substantial policy action.

**The "pledges and targets" scenario,** which includes 2030 and 2035 NDCs and net zero targets submitted under the Paris Agreement, **has slightly worsened**, moving from 2.1°C to 2.2°C, largely because of the US withdrawal from the Paris Agreement which effectively invalidated all of its targets.

**The most "optimistic scenario",** assuming full implementation of all announced targets[1], **remains at 1.9°C – still well above the Paris Agreement's warming limit.**

Despite clear scientific consensus and the legal imperative, **global progress is stalling**. Our analysis shows that while the Paris Agreement has spurred important action, the pace of change remains far too slow. **While a handful of countries are making genuine progress, their efforts are counterbalanced by others delaying, or rolling back climate policies.**

## Fossil fuel expansion vs. clean energy momentum

At the heart of this crisis of inaction is the continued expansion of fossil fuel production and consumption.

Despite global calls to reduce fossil fuel use, several countries are expanding or maintaining support for coal, fossil gas, and oil. Australia continues to approve new fossil fuel projects and increase subsidies, while Argentina invests heavily in fossil gas infrastructure. China, India and Indonesia continue to add new coal power capacity, framing fossil fuels as essential for energy security, while Saudi Arabia and Japan are trying to claim fossil gas is a transition fuel, locking in high-emissions infrastructure. Worst of all, the United States is actively shutting down offshore wind projects, rolling back renewable energy incentives, cutting curbs on carbon pollution, and actively expanding oil and gas production.

However, there are signs of hope: **renewables are accelerating rapidly**, with solar and wind now being the cheapest sources of power. In 2025, renewables generated more electricity globally than coal for the first time.

While the current growth rate of renewable energy is not aligned with the global energy goal of tripling renewables by 2030, a growing number of countries are accelerating their transition away from fossil fuels through stronger renewable energy policies and electrification measures.

- Chile continues to lead in Latin America with a planned coal phase-out for 2035 enshrined in its latest NDC and one of the fastest renewable growth rates worldwide.
- Colombia is gradually shifting away from fossil fuel dependence by maintaining its moratorium on new oil and gas exploration initiated under the Petro administration and promoting renewable investment.
- India has surpassed its target of 50% non-fossil capacity ahead of schedule, driven by record solar and wind investments.
- Ethiopia has banned the import of internal combustion engine vehicles since 2024 to promote electric mobility.
- Switzerland has introduced a legally binding net zero target in 2023 and is rapidly expanding non-hydro renewable energy generation.

1 This scenario also includes both the US's NDCs and net zero target. Our estimates show that removing these targets would lower temperature estimates by up to 0.1°C (0.06°C – 0.07°C).

## The road ahead: urgency and opportunity

The world is running out of time to avoid a dangerous overshoot of the 1.5°C limit.

Insufficient action in the last decade has already led to higher cumulative emissions and more carbon intensive infrastructure. Even if the world could now reduce emissions by 50% by 2030 as indicated in the IPCC Sixth Assessment Report, there is a high likelihood that warming would peak at least 1.6°C above pre-industrial.

The world must focus on urgent action that keeps this peak warming as low as possible. Recent research indicates that a rollout of the highest possible ambition options from now would have a good chance of limiting peak warming to 1.7°C. This pathway could bring global $CO_2$ emissions to net zero before 2050, reach net zero greenhouse gas emissions by the 2060s and significantly remove $CO_2$ from the atmosphere, resulting in warming dropping below 1.5°C before 2100.

Governments must urgently strengthen or overachieve 2030 targets, implement robust policies, and ensure transparency and accountability. The Paris Agreement has set the framework; now, real leadership and ambition are needed to deliver on its promise and safeguard a sustainable future.

**We have said it before, and we will keep saying it: we are running out of time.** Every new fossil gas deal the EU makes, every new coal plant built in China, every fossil gas expansion project in Australia, every exported barrel from Norway, every tonne of LNG Japan pushes into neighbouring Asian countries, costs billions to people elsewhere in the world as they deal with increasingly extreme weather events. These are not abstract policy choices – they are physical realities with human consequences. The atmosphere does not negotiate, and it does not wait.

# Table of Contents

# 1 Progress in the ten years since the Paris Agreement

The Paris Agreement emerged from over twenty years of COPs and diplomatic efforts that helped bridge deep political divides – especially among major powers with differing histories, emissions profiles, and development needs – while striving to address the unique vulnerabilities of developing countries.

The Paris Agreement, now ten years old, was designed to hold global warming to well below 2°C above pre-industrial levels and pursue efforts to limit warming to 1.5°C. The 2025 International Court of Justice Advisory Opinion on climate change anchors the 1.5° temperature limit as the central target of the Paris Agreement for all countries, noting they are obligated to work towards the highest possible ambition for their national determined contributions (NDCs).

Today, climate change is recognised by most as both a global crisis and a shared challenge. The 1.5°C limit remains the scientifically grounded and legally significant temperature goal, the benchmark against which all ambition must and will be measured.

**Our analysis shows the Paris Agreement works.** We can see the improvements in the global temperature projections over time. Back in 2015, our assessment of existing policies showed the world was on track to around 3.6°C of warming by 2100. Ten years later, our latest projections show that this has been reduced by roughly 1°C to around 2.6°C.

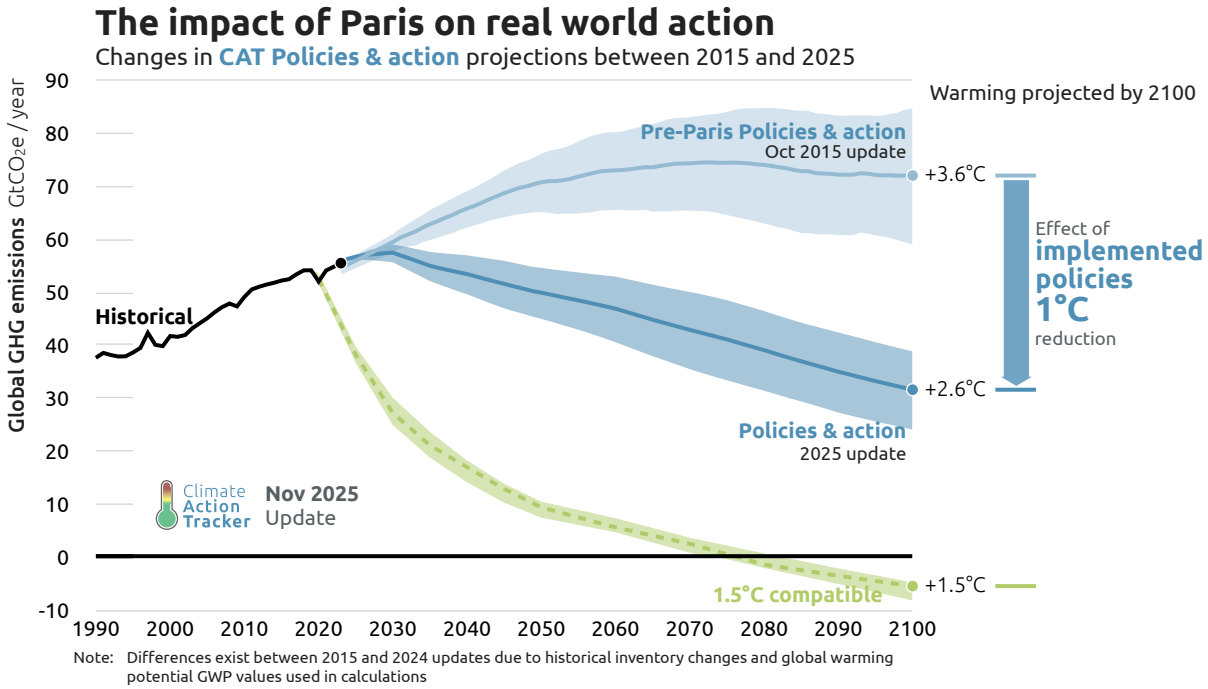



**Figure 2** Comparison of Policies & action projections from October 2015 global update to our latest projections.

The Paris Agreement has reshaped scientific and policy approaches, pushed investment in clean technologies, and driven national reforms that would likely not have happened otherwise. Our analysis of recent developments in the countries we track confirms this trend:

- A growing number of countries are accelerating their transition away from fossil fuels through stronger renewable energy policies and electrification measures.
  - South Africa and Indonesia are advancing the implementation of their Just Energy Transition Partnerships, while
  - Ethiopia has banned the import of internal combustion engine vehicles since 2024 to promote electric mobility.
  - Chile continues to lead in Latin America with a planned coal phase-out enshrined in its 2035 NDC and rapidly growing solar and wind capacity.
  - Colombia is pursuing a gradual shift away from fossil fuel dependence by maintaining its moratorium on new oil and gas exploration and promoting renewable investment.
  - Switzerland is expanding renewable generation and strengthening climate governance frameworks.
- The momentum for renewable energy expansion continues to grow across regions.
  - India has surpassed its NDC target of 50% non-fossil capacity ahead of schedule, driven by record solar and wind investments.
  - Chile is rapidly increasing renewable generation and stands among the global leaders in solar deployment.
  - Ethiopia and Nigeria are advancing clean electrification through grid decentralisation and support for solar mini-grids.

These developments illustrate that, even amid uneven progress globally, the shift toward renewables is accelerating and already reshaping energy systems.

Although this progress is not yet enough to align global emissions with a 1.5°C pathway, it shows that coordinated international frameworks can drive measurable change – this would likely not have been possible without the Paris Agreement and the recognition by countries that collective action is essential.

**As our assessment shows, the most serious concern now is that the progress shown in the first five years after Paris, up until around 2020, has flattened off – just as visible signs of dangerous climate change have emerged vividly around the planet.**

The hope and momentum that defined COP21 in Paris in 2015 – that shared sense of possibility and purpose – has been overshadowed in recent years by global events such as the COVID-19 pandemic, wars, and political regression, with the rise of far-right parties rejecting climate action. However, we interpret this standstill in terms of our warming outlook as the result of two opposing trends – the clean technology revolution vs. the previously dominant fossil fuel industry. Our analysis shows that these two are cancelling each other out, rather than representing a stop in climate action (see Chapter 4 below for further analysis on this).

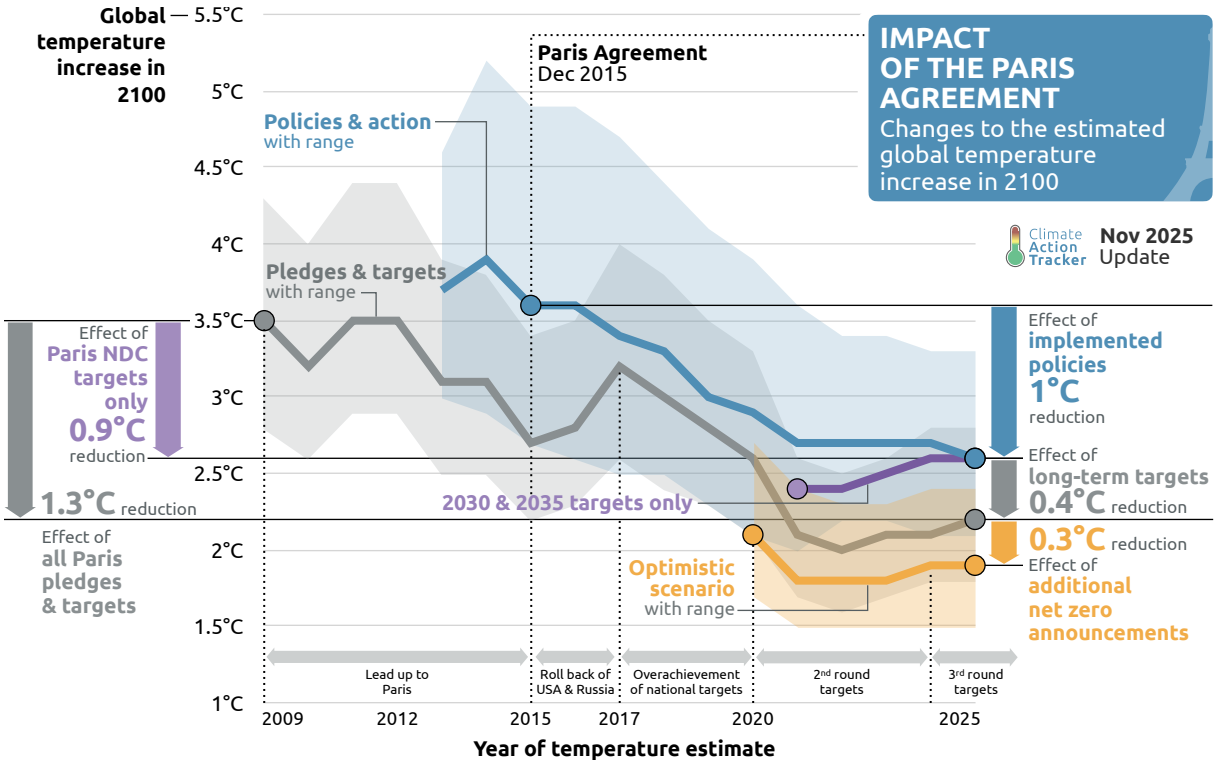



**Figure 3** Impact of the Paris Agreement on the estimated global warming increase in 2100. Figure shows the estimates of the Climate Action Tracker from 2009-2025 for 'Pledges & targets' and 'Policies & action'.

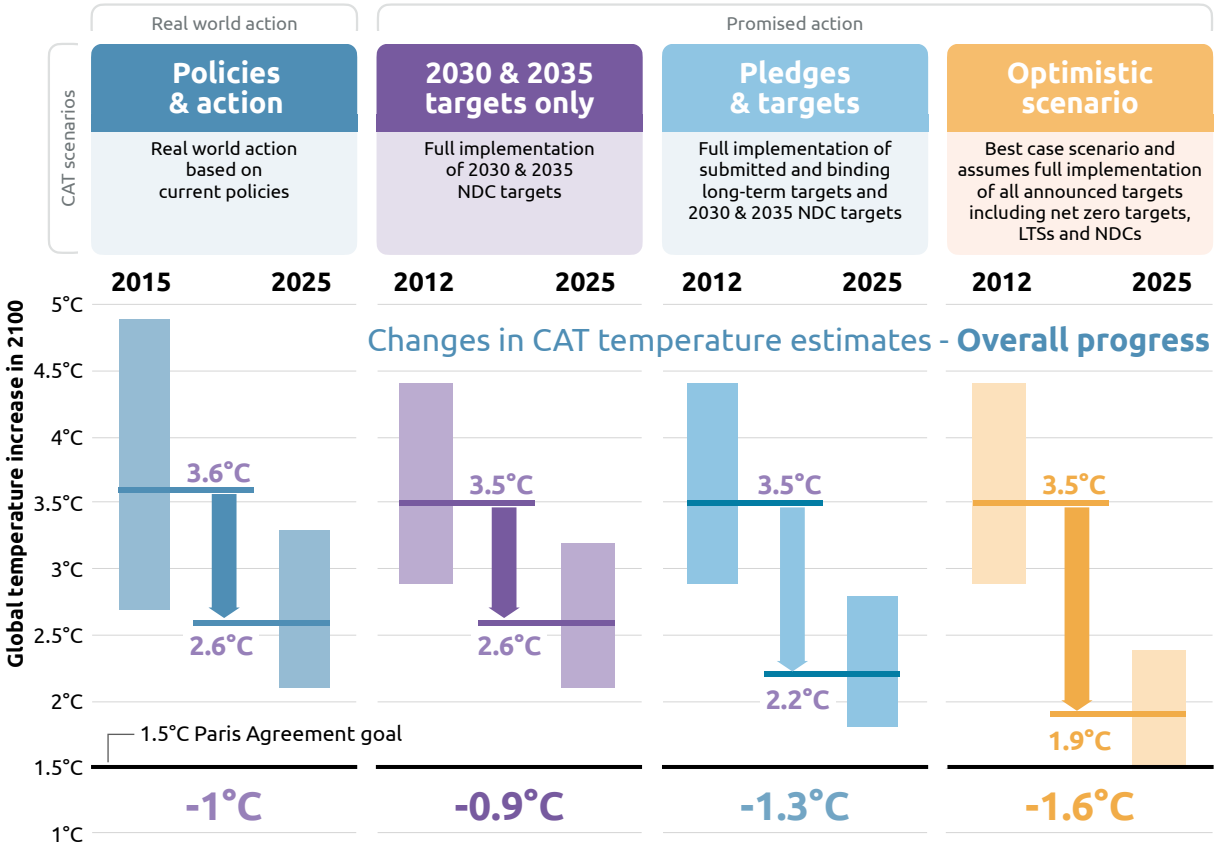



**Figure 4:** Impact of the Paris Agreement on the estimated global warming increase in 2100. Figure shows the difference between the Climate Action Tracker's 2012-2015 and 2025 estimates.

## 2 Global temperature update

**Our global temperature projections** based on this year's policy developments and 2035 targets have almost come to a standstill: it has barely moved over the past four years. The warning signs are clear: we are heading in the wrong direction.

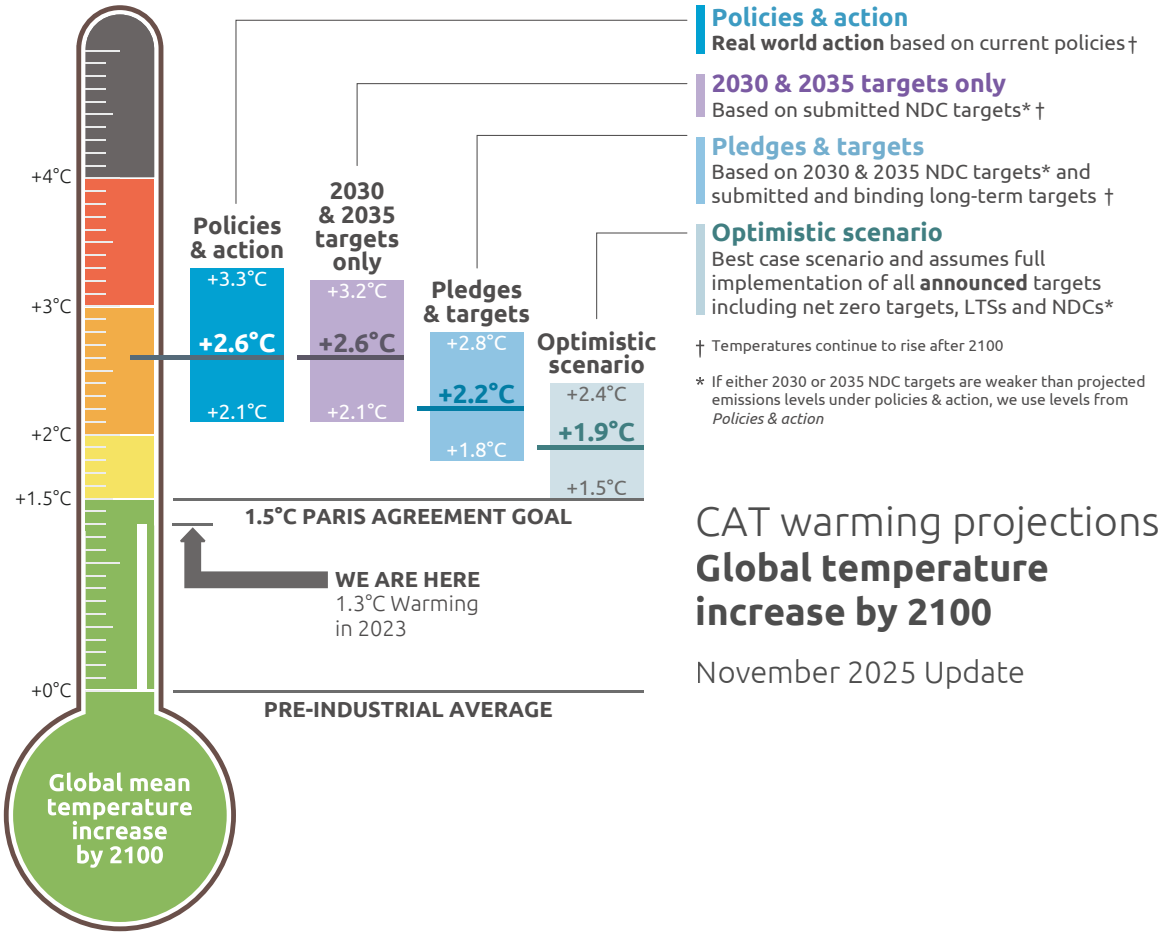



**Figure 5** CAT thermometer with warming projections for 2100.

From Argentina to Australia, and including the last three COP hosts the the UAE, Azerbaijan and Brazil, governments continue to back large-scale fossil fuel production, use, and exports.

**In both China and India, where renewables are expanding significantly, projected emissions have gone up compared to our previous assessments.** For **China**, the increase is primarily attributed to higher-than-expected emissions in 2023, following a strong post-COVID rebound, with energy demand continuing to grow, particularly in tech-intensive manufacturing sectors such as electric vehicles, electronics, and robotics. For **India**, the increase is linked to continued reliance on fossil fuels, the construction of new coal power capacity, increased coal production, and rising electricity demand driven in part by extreme heat, which renewable energy alone is currently unable to offset.

**At the same time, recent changes in government have led to slowdowns or rollbacks of climate policies in a number of countries**. Within the EU, for example, the election results significantly slowed down the agreement on the new 2035 and 2040 targets and ultimately led to a weaker EU position on climate action.

**Worse, the United States has actively rolled back domestic climate policies, taken steps to undermine international climate action** – including most recently by delaying progress at the International Maritime Organization – and is now in the process of formally withdrawing from the Paris Agreement.

These developments are reflected in our data: this year, governments were supposed to come through with new and more ambitious NDCs for 2030 and 2035, but most of them delayed the submission of their 2035 targets way passed the original February deadline. **Almost none of the countries we analyse updated their 2030 target – nor have they set out the kind of action needed to close the emissions gap**. As a result, we see no impact of the 2035 NDCs on the temperature projections, indeed the only movement is a widening of the emissions gap to 1.5°C (see Chapter 5 below on 2035 NDC submissions for further details).

> Our "**2030 & 2035 targets scenario**" which includes the impact of all submitted NDCs to date, remains at 2.6°C, the same as last year. In other words, **the 2035 NDCs submitted so far don't make a difference in terms of temperature outlook**.

> The temperature projections for our "**pledges & targets" scenario**, including 2030 & 2035 NDCs as well as long-term goals submitted to the Paris Agreement, **has increased from 2.1°C to 2.2°C, largely because the US withdrawal from the Paris Agreement** has effectively invalidated its NDC and net zero targets[2].

> Our **optimistic scenario**, assuming full implementation of all announced and net zero targets, **remains at 1.9°C**.

While setting ambitious climate targets is an important step, the real test lies in policy implementation – and here, progress remains disappointingly limited. According to our country analyses, a handful of countries are moving ahead with meaningful climate policies and actions, but their efforts are largely offset by others that are delaying, weakening, or rolling back policies, resulting in minimal overall change.

On one hand some countries are accelerating their shift away from fossil fuels, with strong renewable policies and electrification measures. Chile, India, Germany, Ethiopia, and Nigeria are rapidly expanding solar, wind, and clean electricity, while South Africa and Indonesia advance Just Energy Transition Partnerships. On the other hand, many governments continue to expand fossil fuel production and use: Australia, India, Indonesia, Saudi Arabia, and Egypt are locking in high-emissions infrastructure, slowing down global progress. Finally, the US is actively working to dismantle progress, rolling back climate policies to undermine the deployment of renewable energy and clean energy technologies.

> This year, our warming projections for the **"Policies and action" scenario have shifted from 2.69°C to 2.64°C**, which, when rounded, moves the headline figure from 2.7°C last year to 2.6°C this year.

However, this apparent improvement of just half a degree is mainly due to a methodological change – specifically, the extension of China's emissions pathways to 2100 to better reflect current developments and the expected peak and decline in their emissions – rather than any substantial new policy action worldwide (see Annex for further details on our methodology). According to our country analyses, most governments still need to introduce far more ambitious and immediate climate measures, rather than relying on incremental adjustments.

2 The CAT considers the US to no longer have a net zero target, even though 19 states are still pursuing net zero (Net Zero Tracker, 2025).

## 3 The 1.5°C limit is under threat

**The globally observed annual average temperature increase above pre-industrial levels exceeded 1.5°C in 2024**, making it the warmest year on record (WMO, 2024).

While this does not yet constitute a breach of the Paris Agreement, which assesses the target against a 20-year average and for which we currently stand at 1.3-1.4°C, the trend is unmistakable. The last ten years have been the warmest decade on record, and human-induced warming caused largely by the burning of fossil fuels is progressing at about 0.27°C per decade (WMO, 2024; C3S, 2025).

If governments had begun taking this issue seriously and ramped up their action to reduce emissions in 2020 or before, and if they had listened to the IPCC's Sixth Assessment Report (AR6) that indicated reducing global emissions by around 43% by 2030 relative to 2019 levels would limit warming to 1.5˚C, they could have kept to 1.5˚C - with a reasonable probability.

**But they did not.** Since 2020, greenhouse gas emissions have remained at the same levels – if not increased – as a result of the ongoing fossil fuel-intensive activities and added infrastructure allowed by governments who continued to ignore the warnings. This directly translates into substantial additional cumulative greenhouse gas emissions they should have avoided, and which have added significant warming.

The combination of these factors means that now, even if emissions could be halved by 2030 – from 2025 levels – the chances of limiting peak warming below 1.5° are very low. It now seems likely that a 20–30-year average warming could exceed 1.5°C by the early 2030s.

**This means the world is now headed to a significant overshoot in the decadal average warming of 1.5°C even with high ambition action.**

In an advisory opinion on climate, the International Court of Justice has confirmed the paramount importance of the 1.5°C limit of the Paris Agreement, which is not diminished by this emerging overshoot. The imminence of an overshoot situation, which has not yet occurred, should galvanise political leaders to double down on action, to rectify and overcome the delays and their insufficient levels of action over the last decade.

Recent research shows that if governments adopted their highest possible level of climate action now, they could limit peak global warming close to 1.7°C, with net zero $CO_2$ emissions achieved before 2050 by which time warming would likely have halted (Climate Analytics, 2025).

This "highest possible ambition" pathway could also bring greenhouse gas emissions to net zero by the 2060s, which is slightly earlier than the pathways that were calculated five years ago (IPCC AR6 Paris aligned scenarios). This would then result, along with removing $CO_2$ from the atmosphere (negative emissions), in warming being significantly below 1.5°C by 2100, also consistent with the original IPCC AR6 Paris aligned scenarios.

This would be possible because of the improvements in renewable energy technology, battery storage electric vehicles and a wide range of electrification approaches rolled out across the world compared to the assessment just five to 10 years ago.

**This should sound the alarm for the world:** renewed efforts to strengthen targets, accelerate implementation, and enhance collaboration are critical to fully realise the Paris Agreement's potential and safeguard the climate future.

Yet our most optimistic scenario – that takes into account if all governments were to implement all their commitments and announcements – warming would be limited to close to 1.9°C, which is still substantially above the 1.5°C limit. However, this shows that the promises made by leaders – even if not yet implemented – are getting close to where they need to be. What's missing now is turning these words into action.

**Now is the time to recognise what the Paris Agreement has set in motion, appreciate the progress it has driven so far, and stand up for it as the backbone of the world's response to climate change.**

Every fraction of a degree will translate into devastating losses for people and ecosystems across the world – along with those already observed. From catastrophic floods to record heatwaves, 2024 was another year of climate disasters that tore through communities already stretched to their limits, and 2025 has not been any different.

The International Court of Justice's opinion also stated that the NDCs must represent each country's highest ambition toward this goal, and that failing to meet mitigation obligations is a breach of international law, not just a political failure. Governments failing to act could well see themselves being held to account in the world's highest court.

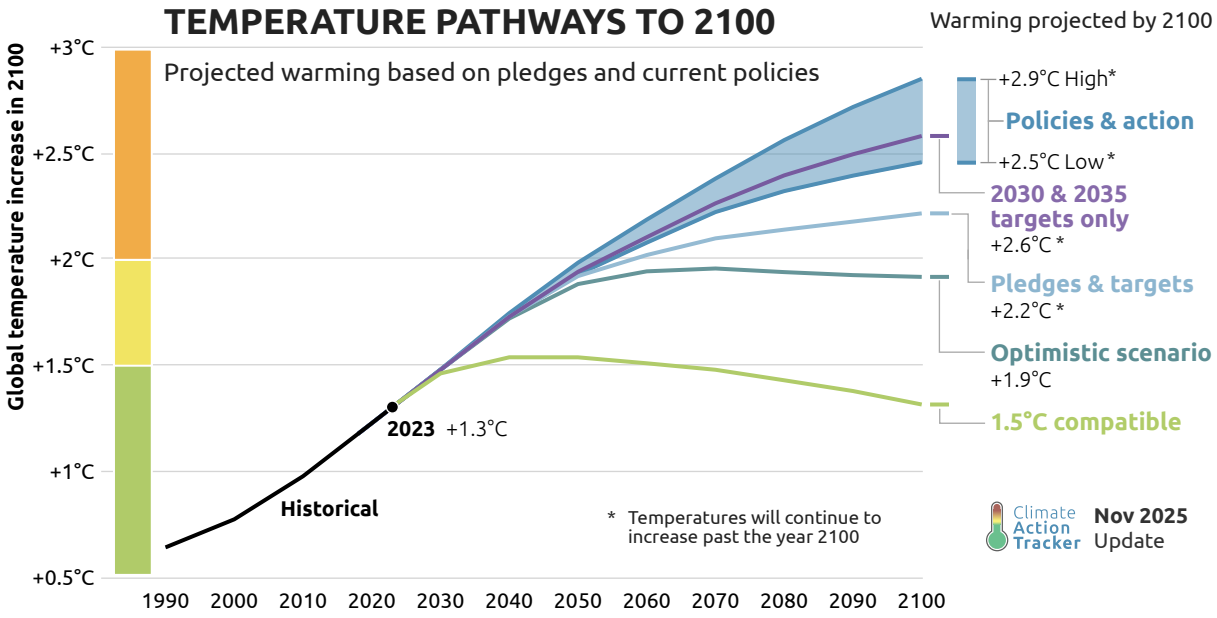



**Figure 6** Temperature pathways to 2100.

In addition to the increased emissions that point to an overshoot of 1.5° there are also increasing concerns about the sensitivity of the climate system to warming, including the potential emergence of positive feedback which could amplify warming:

- **Potential increased sensitivity of the climate system:** new evidence suggests the climate system may be more sensitive than previously estimated, with most low or no overshoot pathways now likely leading to warming of 1.6–1.7°C rather than staying below 1.6°C. Only a few pathways would still qualify as low overshoot.
- **Decreasing sink capacity:** Sink capacity is not only decreasing, but sinks should also be used solely to address temporary overshoot, not to offset ongoing fossil fuel emissions – a practice that is becoming more common rather than less.

Should a higher sensitivity of the climate system be confirmed and the observed decreasing sink capacity continue this would point to the need for deeper and faster reductions than have presently been calculated in order to limit overshoot and avoid potentially catastrophic levels of warming.

## 4 The world still stands at a crossroads: will governments take the right path?

Ten years after the Paris Agreement, the world now stands at a critical juncture in the fight against climate change. Renewable energy and electric vehicle deployment are breaking records and investment in clean manufacturing capacity is growing rapidly. Yet governments still failed to come forward with stronger climate commitments.

The new **US government** is now actively working to dismantle the progress made not only over the past ten years, but also the two decades of tireless scientific and diplomatic work that led to the Paris Agreement.

**The EU** faces growing internal resistance to increased climate action, taking a long time to reach agreement on a target that falls short of positioning the bloc as a climate leader, especially in the wake of the US stepping back from that role.

**Germany** delays its transition, **Canada and Norway** continue to export fossil fuels, **China and India** keep reaching higher emissions levels, and **Australia and Türkiye** fight over hosting the next COP while both openly and loudly planning to expand their fossil fuel industries to their "full potential". Meanwhile, countries on the other side of the world pay the price with lost lives, livelihoods, and their futures.

**At the heart of this crisis lies the continued expansion of fossil fuel production, export and consumption.** Despite repeated pledges to phase out coal, oil, and gas production, Global North countries remain responsible for nearly 70% of all planned new oil and gas projects through 2035 (Oil Change International). This expansion alone would push the world far beyond 1.5°C.

The international scientific community continues to issue increasingly urgent warnings that unchecked fossil fuel development is incompatible with both the Paris Agreement and the protection of global health and stability (Oxford Open Climate Change, 2025). However, in the context of Russia's illegal invasion of Ukraine, several member states of the EU went shopping for fossil gas imports, for example from Azerbaijan, encouraging an increase in their supply rather than focusing on speeding up their own transition to renewables (Climate Action Tracker, 2024).

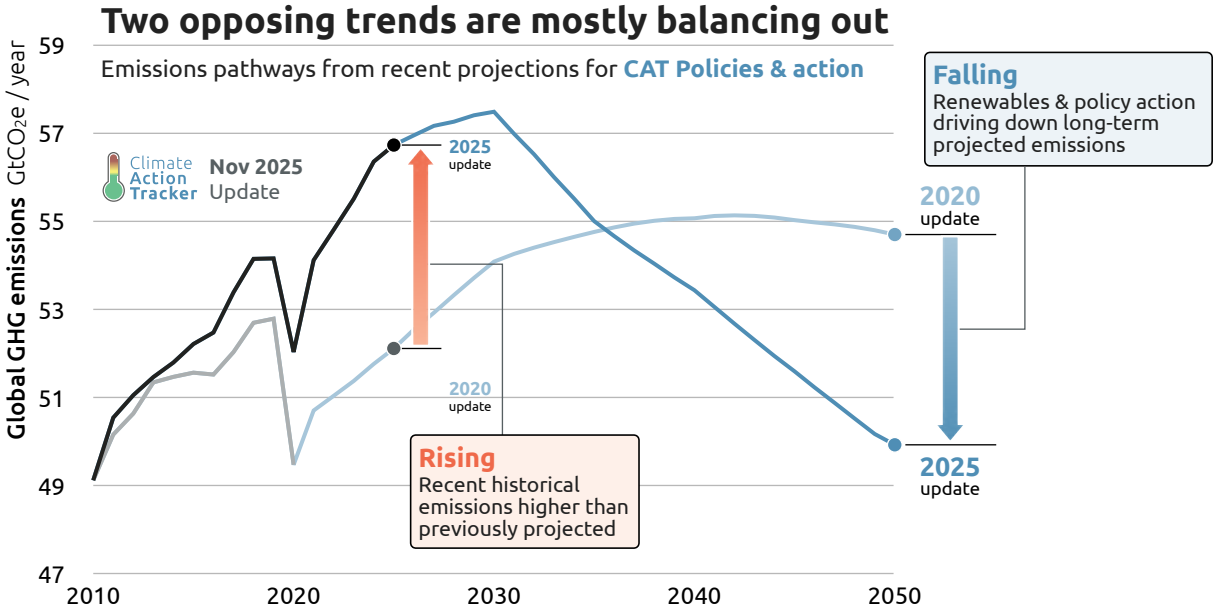



**Figure 7** Two opposing trends are balancing each other out: while renewables and policy action are driving down emissions, those emissions are at a higher level than projected.

Note: The emissions pathway for 2020 was scaled up to match start of the emissions pathway for 2025 line to remove the impact of changes to historical emissions and the use of different global warming potentials (AR4 for the first, AR5 for the second).

**Still, the energy transition is accelerating.** A growing number of countries are phasing out coal, including the United Kingdom, which closed its last coal-fired power station in October 2024, marking the end of an era; and Chile, which has closed half its coal fleet in just five years. In 2025, renewables generated more electricity globally than coal for the first time (IEA). Solar and wind are now the cheapest sources of power, and clean energy industries are creating jobs, boosting growth, and driving innovation (Ember, 2023).

The International Renewable Energy Agency (IRENA) finds that the foundations for a 100% renewable future are already in place: costs are falling rapidly, storage and grid technologies are scaling up, and investment in renewables now offers the highest economic return of any energy option (IRENA, 2025). Achieving full decarbonisation requires not only expanding renewable capacity but also investing heavily in grids, storage, and demand flexibility, along with policies that integrate equity, access, and job creation (IRENA, 2025).

Since 2023, there has been a radical acceleration in clean technologies, particularly in solar PV and electric vehicles. Alongside the spread of climate litigation, ecosystem restoration, and sustainable consumption initiatives, these represent the beginnings of what researchers call "positive tipping points", i.e. moments that reinforce social and technological change and can rapidly transform systems for the better. Each new solar project, electric vehicle, or government commitment strengthens market signals and social norms that make further action more likely (Global Tipping Points, 2025).

**As a result, our current policy projections are each year more optimistic about the potential speed of emission reductions after a global peak is reached.** While past emissions keep rising, the potential speed of reductions is increasing. Both effects cancel each other out, leading to the same temperature outcome by the end of the century.

These reinforcing dynamics demonstrate that transformation can happen faster than expected when ambition aligns with opportunity. We are in the time of opportunity, where the challenge ahead is no longer technological, it is political. The question is not whether a 1.5°C-consistent future is possible, but whether we choose to have one.

## 5 2035 NDC submissions: our analysis so far

As of 10 November 2025, only 53 of the countries we assesses (including 27 countries within the EU) – and 105 countries worldwide – have submitted their 2035 climate targets (NDCs) to the UNFCCC, despite the initial deadline to do so by early February. Collectively, these targets cover 74% of global emissions and about 59% of the global population.

### 2035 NDC targets - Who has submitted?

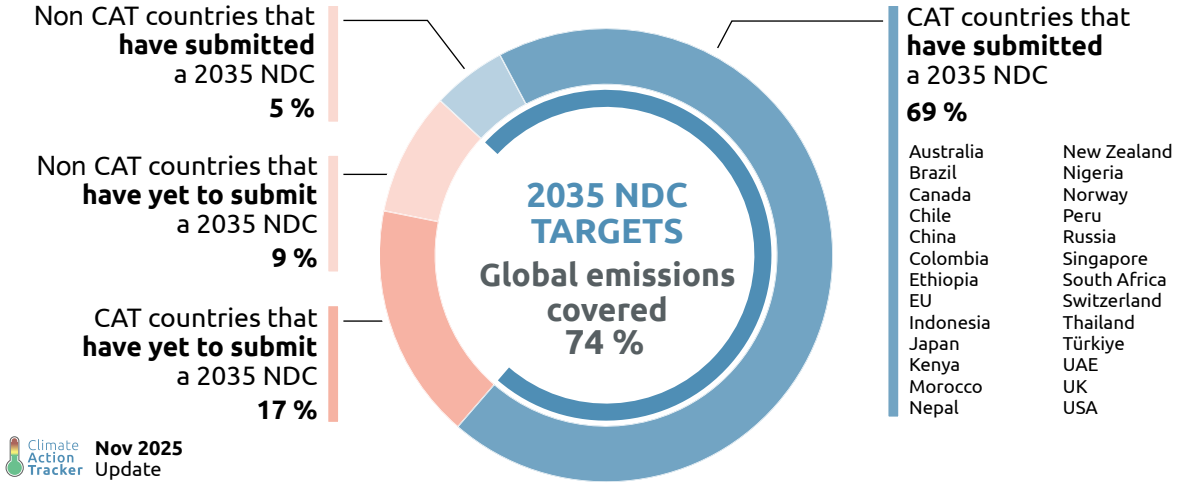



**Figure 8** 2035 NDC submissions by share of global GHG emissions.

## The causes and the consequences of delay

Several factors contributed to this delay. On the political front, many governments waited to see how ambitious the pledges of major emitters would be before finalising their own commitments. The US withdrawal from the Paris Agreement and subsequent rollback of domestic climate policies removed a key reference point, weakening the competitive dynamic that had previously encouraged many major economies to submit NDCs in the early 2020s.

At the same time, 2024 – the largest election year in modern history – was marked by a series of national and regional elections that reshaped the political landscape across many countries. Many new governments shifted priorities, and, in some instances, climate action has been deprioritised or delayed, affecting the NDC development process. Within the EU, for example, the election results resulted in a weaker EU position on climate action, slowing its agreement on its 2035 target.

In many developing countries, these political considerations are also compounded by practical constraints: limited access to reliable data, insufficient technical capacity, and competing domestic priorities: all of which contributed to slower progress.

**The consequences of delay go beyond lost time:** instead of building momentum, these delays fuel doubt and distrust in the process. With many countries yet to submit their 2035 NDCs, policymakers and observers entered COP30 with an incomplete picture of national commitments and the overall level of ambition – making it difficult to assess global progress and hold governments accountable.

A key problem is that three of the world's largest emitters, responsible for nearly half of global emissions in 2024 (45%, Primap, 2024) are either failing to submit a target that will significantly change the course of their emissions, in the case of China and the European Union, or are actually rolling back climate policies and trying to slow climate action globally, like the case of the US.

On 3 November, China officially submitted a 2035 climate target that is unlikely to drive down emissions, as the country is already on track to meet it with existing policies. The new 2035 target aims for a 7–10% cut from peak levels by 2035 and marks a welcome shift from emissions and energy

intensity targets to, for the first time, an absolute emissions reduction target. The new 2035 NDC remains conservative compared to what is needed to meet global climate goals, leaving room for China to demonstrate greater ambition and leadership. China could further control and reduce fossil fuel dependence by integrating clear targets for coal consumption reduction in the 15th Five-Year Plan (expected in early 2026).

Making it just in time for COP30, the EU submitted a 2035 NDC target on November 5 aiming to reduce emissions by a range of 66.25%–72.5% below net 1990 levels. This falls well short of the minimum 77% (incl. LULUCF) cut needed to align with a 1.5°C compatible modelled domestic pathway and is a blow to the EU's climate leadership.

The current US current administration is actively rolling back climate policies in the United States and seeking to undermine action globally, with a recent example being the pressure placed on countries to defer the IMO greenhouse gas controls for at least a year. The US announced withdrawal from the Paris Agreement has effectively annulled the Biden Administration's climate targets for 2030, 2035, and 2050. Under Trump, emissions are projected to fall 19%–30% below 2005 levels by 2030 (excl. LULUCF), compared to 29%–39% under the Biden administration. Nevertheless, it can be hoped that the previously submitted 2035 NDC still serves as a guide for subnational and non-state actors continuing climate action.

If the world is to move beyond the obstruction and climate denial of the Trump administration there will need to be clear leadership from China, the European Union and many other countries to move action forward and align with the Paris Agreement's 1.5°C goal.

## So far, 2035 NDC submissions have failed to move the needle

Despite the new round of 2035 targets, global climate ambition has barely shifted. The latest analysis shows that emissions under current NDCs are projected to reach 53-57 $GtCO_2e$ in 2030 and 48-52 $GtCO_2e$ in 2035 – far above the levels consistent with a 1.5°C pathway, which would require emissions to fall to 27 $GtCO_2e$ by 2030 and 21 $GtCO_2e$ by 2035.

The gap between countries' targets (including NDCs and long-term taregts) and the 1.5°C pathway is **widening rather than closing**. By 2030, the "target gap" stands at around 26-29 $GtCO_2e$, increasing to 26-31 $GtCO_2e$ by 2035. This means that even if all current NDCs and long-term taregts were fully implemented, global emissions in 2035 would still be more than double (~125%-150%) the level required for 1.5°C compatibility.

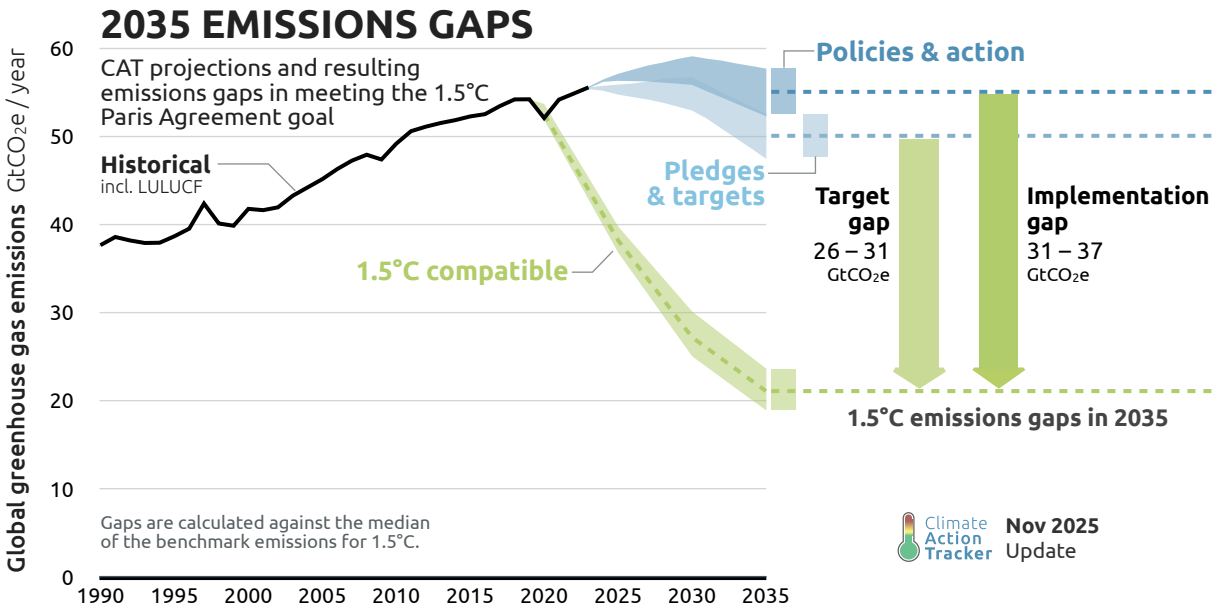



**Figure 9** 2035 emissions gap between Pledges & targets ('Target gap') and Policies & action ('Implementation gap') and levels consistent with 1.5°C.

**This picture has not improved compared to last year.** The new 2035 targets have failed to "move the needle": the world remains almost exactly where it was before this latest round of submissions. Although some countries have set 2035 targets that are nominally below their 2030 levels, the overall global outcome shows no measurable strengthening of ambition.

The gap between current targets and 1.5°C pathways in 2035 is only about 15% smaller than the gap to current policy projections, meaning that even if all governments deliver on their pledges, the improvement over existing trends is marginal to none. Every year of delay locks in higher emissions and makes the eventual transition steeper and more expensive – as far deeper emissions reductions will be needed to stay within the Paris temperature limit.

As a result, **global warming projections remain effectively unchanged**: the combined effect of current policies, 2030 targets, and the newly submitted 2035 NDCs still places the world on track for around 2.6°C of warming by 2100. To keep 1.5°C within reach, governments must urgently strengthen their 2030 targets and ensure that 2035 targets align with the deep emissions cuts required in that decade.

## A closer look at the 2035 NDCs

The global picture remains uneven. A handful of countries have raised their ambition with stronger commitments, but their efforts are counterbalanced by others that are delaying, weakening, or rolling back targets. The result is minimal improvement, if any. The story persists: laggards continue to hold the world back, even as some governments keep pushing forward.

### The positives

#### Some countries[3] are setting ambitious targets compatible with 1.5°C pathways

- **Kenya** submitted an unconditional 2035 NDC target (i.e., to be achieved without international financial support) that is 1.5°C compatible when compared to its fair share contribution to climate action.
- While **the UK**'s 2035 target aligns with cost-effective pathways limiting warming to 1.5°C, its fair share of climate action must go beyond what it does domestically. The UK should therefore increase the climate finance it provides to developing countries to facilitate substantial emission reductions internationally and ultimately communicate this as part of its NDC.
- Similarly, **Norway**'s 2035 target aligns with cost-effective 1.5 °C pathways domestically, but the country continues to produce, export, and profit from oil and fossil gas, undermining its overall ambition. Norway should stop fossil fuel exports and increase climate finance to support emission reductions in developing countries, reflecting its fair share of climate action. Norway's exported fossil fuel emissions are around 10 times higher than the level of its domestic emissions.

3 The CAT is working on finalising our analysis of 2035 NDCs so this list might change in the next few days.

## Other countries are effectively moving towards fossil fuel phase out

In this new round of NDCs, some governments have either committed – or reiterated their intention – to phase out fossil fuels. Burning fossil fuels is the main driver of climate change, making it essential to end coal, oil, and fossil gas production, as well as halt new exploration and eliminate fossil fuel subsidies.

- In its new NDC, **Morocco** has committed to phasing out coal by 2040 and reiterated its intention to significantly scale up renewables. While this is an important milestone, the country will require substantial international support, as it still relies on coal for around 60% of electricity generation as of 2024 and its coal fleet is still relatively young – most of Morocco's coal plants have been built or renovated in the 2010s.
- **Chile** continues to stand out as a global climate leader for its accelerated coal phase-out plan. Given it is well on track, President Boric announced his intention to advance the coal phase-out date to 2035 or earlier, a possibility also reflected in energy sector plans. However, this is contingent on needed improvements in renewable energy integration and grid infrastructure.
- In its new NDC, **Colombia** mentions its Just Energy Transition roadmap, which envisions a progressive phase-out of coal-fired power with last coal plant to close by 2036 and ban on new concessions for open-pit coal mining, and its recent pledge to end to oil and fossil gas exploration.
- **The UK** closed its last coal-fired power station in October 2024, marking the end of an era. As a front-runner in the transition away from coal in the power sector, the UK needs to now progress its phase out of fossil fuels beyond coal and should not be developing new oil and gas resources.

## Finally, some countries are being transparent about what their targets really mean

A recurring challenge in assessing NDC ambition is that many targets are formulated in ways that are opaque and hard to interpret. In practice, it is often unclear how ambitious a target really is or what a government is concretely committing to. This lack of transparency makes it difficult to track progress, compare efforts across countries, and hold governments accountable for delivering on their commitments.

- **Chile** has set a notable example of transparency in its communications to the UNFCCC, and its 2035 NDC is not an exception. It establishes absolute net emissions reduction targets excluding land use and forestry (LULUCF), along with emissions budgets for the period, clearly outlining both the end goal and the pathway to achieve it.
- **Brazil**'s 2035 NDC submissions stated its intention to use Article 6 and transparently communicated the extent to which they plan to do so. Following its submission, the Government published its National Mitigation Strategy, which includes the expected contribution of each sector to both the 2030 and 2035 NDC targets, including the land use and forestry sector.
- **China**'s 2035 climate target, a shift from emission and energy intensity targets to, for the first time, setting absolute emission reduction targets that cover all GHGs.
- **Nigeria** moved from a target below a Business-as-Usual (BAU) to emission reductions below 2018 historical emissions. This is a welcome change as it provides a consistent base year compared to previous NDC submissions where the BAU was revised, changing the ambition level of the target.
- In its 2035 NDC, **Indonesia** has shifted from presenting targets relative a BAU scenario developed in 2010, to an emissions reduction target below 2019 levels. The new NDC also expands its GHGs coverage to include hydrofluorocarbons (HFCs).

## The negatives

### The gap between the NDC targets and the required emission levels to limit global warming to 1.5°C is increasing

As shown above, only a handful of countries have submitted 1.5°C-aligned targets. More worryingly, for most countries whose targets are not yet 1.5°C aligned, the gap between those targets and a 1.5°C pathway grows over time – signalling a weakening, not strengthening, of ambition. Progression is not only measured by whether new targets are more stringent or lead to lower emissions than their predecessors, but by whether they narrow the gap to a 1.5°C-aligned pathway.

### The lack of ambition in 2030 remains the same as very few countries have enhanced 2030 targets

So far, almost none of the countries we track have strengthened their 2030 climate targets in the latest round of submissions, a critical failure given the urgent need to halve global emissions by 2030 to avoid dangerous climate change. The existing 2030 targets remain far from adequate, and without substantial improvement, the world risks a multi-decadal, high overshoot of the 1.5°C limit, with severe consequences for people and ecosystems.

### Slow implementation

Many countries do not have the policy framework in place to meet their new targets. While setting ambitious targets is important, policy implementation is critical. Governments need to introduce far more ambitious and immediate climate measures, rather than relying on incremental adjustments. This requires not only accelerating the deployment of renewable energy but also revisiting key sectors such as industry, transport, and energy to drive deeper emissions reductions. Without substantial policy shifts and enhanced climate action, these countries are likely to fall short of their climate goals for both 2030 and 2035.

- **Australia**'s current policies would cut emissions 28–33% below 2005 levels by 2035, well short of its 45–54% target and the 1.5°C least-cost pathway of 57% (excl. LULUCF). Closing this gap will require far more ambitious and immediate climate measures, rather than relying on incremental adjustments, including enhancing the pace of renewable energy deployment and revisiting key sector strategies to drive deeper emissions reductions.
- **Canada**'s current policy projections for 2035 show a significant implementation gap with its 2035 target. Current policies would cut emissions to 17% below 2005 levels while its target sees emissions reductions of 40–49% below 2005 levels (excl. LULUCF). To align with 1.5°C compatible least-cost pathways, Canada would need to reduce its emissions to a reduction of 65% below 2005 levels (excl. LULUCF). Urgent action will be needed to introduce, strengthen and implement policy mechanisms that turn this 2035 target into reality.
- While **Norway** does have an ambitious 2035 target of 67–72% (excl. LULUCF) aligning with a 1.5°C compatible least-cost pathway, its current policies will only cut emissions by 38% below 1990 levels by 2035 leaving a significant implementation gap.
- **UAE** emissions are projected to continue rising through 2035 under current policies. Although the recently submitted 2035 NDC sets an ambitious goal of reducing emissions 44% below 2019 levels, there is no detailed plan or policy framework explaining how these cuts will be achieved.

## NDCs at or above current policy projections or below high baselines

Many governments have set targets that land above the emission levels already expected under current policies. In practice, this means that these new targets can be met without any additional policies beyond what is already planned or underway. In other words, they don't drive and guide stronger climate action over the next decade.

Other governments continue to formulate their NDCs as reductions below unrealistically high baseline scenarios (e.g., above emissions under current policies), effectively allowing emissions to continue to grow rather than decline. This enables them to claim progress without actually shifting domestic trends or delivering real emission cuts, undermining the credibility and effectiveness of global climate efforts.

- **China**'s 2035 NDC target is unlikely to further drive down emissions, as the country is already set to achieve this target with the policies it has in place.
- Once emissions from land use and forestry are removed from **Brazil**'s target, it reveals a slow decarbonisation rate for all other sectors. This recalculated 2035 NDC range lands very close to the range of emissions under current policies, signalling limited additional action planned to decarbonise the economy.
- **Russia** can easily achieve its 2035 NDC target of 27–33% below 1990 levels (excl. LULUCF) under current policies which project emission reductions of 30–35% below 1990 (excl. LULUCF), providing no new momentum to reduce emissions further. Russia's LULUCF figures are questionable, given official reporting on wildfires has been significantly lower than independent analyses based on satellite data. Many of these wildfires occur in unmanaged forests, leading to extraordinarily large fires. Russia includes unmanaged forests in its inventory – contrary to the UNFCCC protocol – and reports it as a major sink. Full transparency around its LULUCF data is needed.
- **Türkiye**'s 2035 NDC target continues to be presented as an emissions reduction below a business as usual (BAU) scenario. This projection far exceeds current policies and allows Türkiye to meet its 2030 and 2035 targets without additional action.
- **Kenya**'s reliance on a BAU scenario to define its emissions reduction targets, along with its stated right to revise the baseline, raises concerns about accountability and transparency. If the baseline is adjusted upwards, it risks undermining ambition and allowing continued emissions growth.

## Relying on land use and forestry sinks rather than decarbonising their economies

Many governments continue to rely on land use and forestry sinks to offset emissions from the energy sector while apparently boosting their climate targets. The use of forests as offsets enables the burning of fossil fuels to continue, delaying the energy transition. Uncertainties with forest fires, insect plagues and factors that reverse or limit the sink also represent key uncertainties and risks for GHG emission trajectories. NDCs should focus on deep domestic emission cuts across all sectors, not creative accounting.

- **Australia**'s reported 28% emissions drop since 2005 is almost entirely due to land sector revisions, while it has reduced fossil fuel and industrial emissions by only 2%. This highlights the urgent need for governments to report land sector targets separately and prioritise genuine decarbonisation, i.e., cutting fossil fuel emissions.
- **Brazil**'s National Mitigation Strategy projects that the land use and forests sector will shift from a source to a sink, mainly through reduced deforestation and restoration efforts. However, this focus should not slow progress in other sectors. CAT's recalculation of the 2030 target shows that, excluding LULUCF, Brazil's planned economy-wide decarbonisation is much slower than previously assumed.

- **Russia** plans to heavily rely on the LULUCF sector to achieve its 2035 target. The latest inventory updates have sharply increased the size of the estimated forest sink reducing the need to make real emissions reductions. Russia's flexibility in recalculations of its LULUCF historical data weakens the transparency and fixed nature of its 2035 target
- **Canada**'s 'gross-net' accounting allows land sinks to count toward its 2035 target, making it unclear how much actual decarbonisation is planned for other sectors of the economy.
- **New Zealand**'s 2035 NDC target also follows a 'gross-net' approach. As with its 2030 target, in its 2035 target New Zealand has set 1990 as the activity start year and excludes LULUCF emissions or sinks established prior to that year. This accounting approach presents an incomplete picture of New Zealand's emissions. Forests planted before 1990 can continue to play a major role in carbon storage or release and excluding them may conceal substantial emissions or removals. In fact, the 2035 target may even allow for higher gross emissions than the 2030 target and introduces greater uncertainty in its reduction pathway, as its upper end is above the upper range of the 2030 target.

## Relying on purchasing or selling international carbon credits (Article 6)

An increasing number of governments are planning to rely on purchasing international carbon credits under the Paris Agreement's Article 6 to meet their climate targets, with several officially expressing interest as buyers or sellers.

The CAT cautions that this approach risks delaying much-needed domestic mitigation, particularly given the challenges in developing high-quality, verifiable carbon credits. More importantly, the use of Article 6 could end up being a zero-sum game, as selling countries would need to deduct the transferred emissions, effectively reducing their own ambition. Governments – especially from the Global North – should prioritise cutting emissions at home rather than depending on international carbon credits.

- The current 2040 target proposal endorsed by **EU** member states includes the use of international carbon credits under Article 6 equal to up to 5% of the 2040 target which could have implications for its 2035 target. The EU's laws require the 2030 target and 2050 net zero target to be met without the use of carbon credits. Reintroducing offsetting into its plans would severely weaken the EU's domestic ambition and open the door to accounting loopholes, risking the achievement of the EU's net zero target.
- **Brazil**'s target includes selling part of its planned emission reductions, which poses a risk: by transferring relatively inexpensive reductions that might have happened anyway, Brazil could be left with fewer and more costly options to meet its own future climate goals. These carbon credit transactions would require Brazil to make a corresponding adjustment, transferring Brazil's climate ambition to another country.
- **Kenya** plans to sell emissions reductions if it overachieves its NDC target. This poses a risk, as our analysis shows Kenya's unconditional 2035 NDC target is set above current policy projections, meaning that any reductions Kenya might sell 'beyond its unconditional NDC' may not be truly additional.
- **Switzerland**'s lack of transparency on the share of emission reductions to be achieved domestically versus through international carbon credits makes it almost impossible to assess the ambition of its 2030 and 2035 targets. Based on available information, the CAT assumes that only 60–67% of Switzerland's 2035 NDC target will be achieved through domestic emissions reduction.
- Under Article 6, **Japan** plans to use its Joint Crediting Mechanism (JCM) to secure accumulated emission reductions and removals at the level of approximately 100 $MtCO_2e$ by 2030 and approximately 200 $MtCO_2e$ by 2040. However, the JCM's impact remains limited: despite partnerships with over 30 countries, it has delivered few projects and minimal reductions, with Japan claiming only 0.8 $MtCO_2e$ of credits.

# 6 Net zero targets

At their best, ambitious net zero targets are crucial for cutting emissions in line with the Paris Agreement's 1.5°C limit and guiding strong action through 2030 and 2035. At their worst, unclear or unsupported net zero targets risk distracting from urgent emission cuts, letting governments hide behind distant promises instead of acting now.

As of October 2025, most net zero targets assessed by the CAT remain vague and fall short of good practice, with only Chile, Colombia, Costa Rica, the EU27, Switzerland and the United Kingdom out of 41 countries assessed – covering just 8% of global emissions – rated 'acceptable'. Robust short-term targets and clearer pathways are urgently needed to turn these ambitions into real-world emissions cuts (Climate Action Tracker, 2025).

The Trump Administration's reneging of the US commitment to net zero emissions by 2050 has reduced the coverage of global emissions by net zero targets to 77%, down from 89%. However, 19 US states are still pursuing net zero. The last G20 country to set a net zero target is Mexico, which announced its 2050 net zero target at COP29 in November 2024. As of October 2025, however, the governments of Mexico, South Africa and Indonesia have not further substantiated the scope and architecture of their targets, so our assessments for these targets remain 'Target information incomplete'.

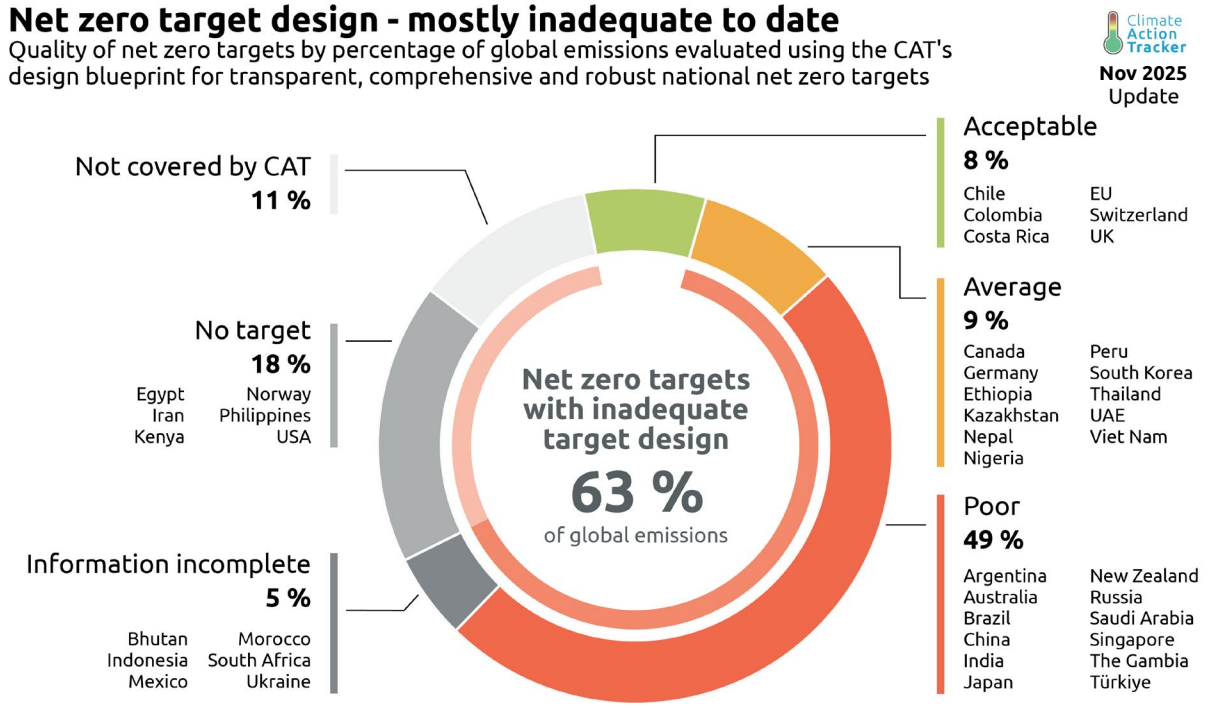



**Figure 10** Share of global GHG emissions by Climate Action Tracker's headline evaluation for announced net zero targets as of November 2025. Emissions data excluding LULUCF for 2019 taken from PRIMAP emissions database (Gütschow et al., 2021).

# 7 Country snapshots

Despite last year's controversial early departure of its negotiation team from COP29 and concerns over a potential withdrawal from the Paris Agreement, **ARGENTINA** has continued to work on its international climate commitments, with a new NDC expected around COP30. However, there has been little movement in its domestic climate policy space, and the official position of the current administration continues to be close to climate denialism.

To add insult to injury, this year Argentina has seen record oil and gas exports, mostly due to production ramping up in the Vaca Muerta shale fields, combined with political turmoil dampening production volumes in former supplier (now turned customer) Bolivia. At this rate, the oil and gas sector is well on its way to becoming one of the top contributors to Argentina's economy, deepening the country's dependence on fossil fuels, with no energy transition in sight.

Despite warnings from the first Climate Risk Assessment about the severe environmental, social, and economic consequences of the escalating climate crisis, **AUSTRALIA** continues to back large-scale fossil fuel production and relies heavily on LULUCF removals to meet its 2030 target. In September 2025, the government released its 2035 target alongside its Net Zero Plan and six sectoral emissions reduction plans.

However, the absence of a 2035 renewable energy target, the retention of the 82% renewable generation target for 2030 in the electricity mix despite evidence supporting a 90% target by 2035, and continued dependence on domestic offsets for industrial decarbonisation all signal limited ambition. This weakens Australia's credibility in advancing regional climate leadership and its bid to host COP31 in 2026.

Since taking office in January 2023, President Lula da Silva has focused on rebuilding **BRAZIL**'s environmental policy emphasising low-carbon, socio-economic development, as the country prepares to host COP30. Brazil's new 2035 NDC reflects a renewed effort to combat deforestation and ambitious land-use commitments. However, its 2035 target is not aligned with 1.5°C and relies heavily on reductions and removals in the land-use sector, not fostering decarbonisation across the economy. Although new economy-wide policies aim to foster sustainable growth and include energy transition as one of their main pillars, Brazil continues to investment in oil and gas development and production, particularly drilling in the Amazon Basin. This contradicts the Paris Agreement's target and Brazil's ambition to lead on climate action during COP30 raising concerns about the prioritisation of sustainability and environmental goals within Brazil's infrastructure agenda.

**CANADA** has made progress in recent years to reduce emissions, but ongoing policy delays and rollbacks threaten to undermine these gains. While the previous federal government under Justin Trudeau finalised key measures like the zero-emissions vehicle (ZEV) mandate and clean electricity regulations, other important policies – such as stronger oil and gas methane regulations – have yet to be implemented. Mark Carney replaced Trudeau earlier this year, and although expectations were high given his climate credentials, so far, his government's climate agenda has not lived up to those expectations. Carney's first moves included cancelling the consumer carbon price, pausing the 2026 ZEV target, and signalling support for new fossil fuel projects. He has also not reaffirmed Canada's already weak 2030 and 2035 targets, casting doubt on his commitment to achieving them. Canada remains far off track to meet its 2030 target, and any further weakening of climate policy will only widen this gap.

**CHILE** continues to stand out as a regional and global climate leader for its comprehensive planning, accelerated coal phase-out plan and rapid renewables expansion. The country's new 2035 NDC sets an absolute emission target and an emissions budget for the 2031-2035 period. In 2025, Chile finalised its sectoral mitigation and adaptation plans – key instruments established under the Framework Law on Climate Change. The coal phase-out is progressing, with President Boric recently announcing his intention to advance the target year from 2040 to 2035. In 2024, Chile reached a new milestone by generating, for the first time, a third of its electricity from wind and solar. However, curtailment continues to limit renewable potential, sustaining dependence on coal and gas. Despite strong progress overall, other sectors must accelerate decarbonisation, as Chile is not on track to meet its 2030 NDC target under current policies.

If **CHINA**'s current clean energy momentum continues, 2025 could mark the peak of its $CO_2$ emissions. In the first half of 2025, emissions fell by 1% year-on-year as renewable capacity expanded faster than electricity demand. In its new NDC, China pledged to reduce economy-wide net GHG emissions by 7–10% from their peak by 2035. While widely regarded as a conservative goal unlikely to exceed reductions expected under existing policies, it should be seen as a *floor* rather than a *ceiling* for China's ambition. China has already surpassed two of its 2030 NDC targets: installing over 1,600 GW of wind and solar capacity (compared to the 1,200 GW target) and increasing forest stock volume to over 20 billion $m^3$ (exceeding the 18.5 billion $m^3$ target). However, the country risks missing its 2025 domestic $CO_2$ intensity target and will need substantial additional efforts to achieve the 2030 goal of reducing $CO_2$ intensity by 65% from 2005 levels.

**COLOMBIA** has emerged as a climate leader with ambitious commitments, including halting new oil and fossil gas exploration and making significant progress in solar capacity, electric vehicles, and deforestation reduction. However, a critical implementation gap remains, driven by policy execution challenges and exacerbated by its fiscal dependence on fossil fuel revenues and a global financial architecture that lacks the instruments necessary to enable decarbonisation in fossil-dependent economies. Colombia's pledge to halt new oil and fossil gas exploration licences triggered credit downgrades and higher borrowing costs, illustrating the stark trade-offs and misalignment between climate ambition and the international financial system. The country will struggle to close the gap between climate ambition and implementation without equally ambitious international support reflected in concessional financing, alongside reforms to the global financial system to reduce the risks of diversifying the economy away from fossil fuels.

**EGYPT** is slowly emerging from its economic crisis, during which climate action has seen limited progress. The nation's emissions are projected to continue rising through 2035, and its current climate commitments will do little to reverse this trend, as they are set at a level above that which is already expected under current policies. While the government has set an ambitious renewable energy target of 42% by 2030, deployment has largely stalled in recent years. Instead, the government is moving ahead with plans for massive fossil gas expansion and continues to place fossil gas at the centre of its energy strategy, a move which risks locking the country into a high-emissions pathway.

**ETHIOPIA**'s climate action illustrates the challenge of improving economic growth and energy access while enhancing climate mitigation action. The government's 2024 NDC implementation plan and 2023 Long-Term Low Emissions Development Strategy demonstrate strong climate commitments, aiming for net-zero emissions by 2050, though significant investment and international support are required. Its power grid is almost fully decarbonised, with 95% of electricity generated from renewable sources. In a landmark move, Ethiopia became the first country in the world to ban the importation of internal combustion engine vehicles (ICEVs). To accelerate the transition to electric vehicles (EVs), the government removed VAT, surtax, and excise taxes on EV imports while reducing the import tax on partially assembled EVs. However, agriculture and LULUCF remain the country's main sources of GHG emissions. Ethiopia's growing portfolio of LULUCF projects for carbon credits raises concerns, as it may undermine efforts to cut emissions domestically and across other sectors.

Making it just in time for COP30, the **EUROPEAN UNION** submitted a 2035 NDC target aiming to reduce emissions by 66.25% - 72.5% compared to 1990 levels (incl. LULUCF). This 2035 target range is not 1.5˚C aligned compared to modelled domestic pathways nor does it meet the EU's fair share. Coupled with the 2035 NDC is the 2040 climate target proposal endorsed by EU member states, which has been significantly watered down from what the European Commission had originally recommended in February 2024. In addition to opting for weaker targets, the EU has chipped away at existing climate policies and measures. EU member states have now sought to delay the implementation of the EU ETS II by a year, set to come in from 2028 instead of 2027; earlier this year the EU Commission opted to delay the 2025 $CO_2$ standards target for vehicle manufacturers – now to be achieved by 2027 – which will effectively lead to an additional 26 -51 $MtCO_2$. These amendments, coupled with the watered down 2040 target, continue to delay the pace of emission reductions needed to limit warming to 1.5°C.

**GERMANY**'s new government took power in May 2025 under a coalition contract that undermines existing climate policies and actions. The policies described in the contract are insufficient for achieving the national emissions reduction targets as enshrined in law under the country's Climate Change Act. Yet with a 60% share of the electricity supply, expansion of renewables is still strong compared to progress in other sectors—and other countries. The CAT's emissions projections for 2030 are now higher than the previous update.

**INDIA**'s power sector has reached a turning point. In 2024-25, non-fossil sources supplied most new electricity generation. Yet coal still anchors the system, around 75% of annual output and new coal capacity, higher domestic mining, and greater utilisation of existing thermal plants are entrenching dependence. India achieved its conditional NDC target of 50% non-fossil capacity ahead of schedule, but non-fossil generation remains near ~25%, reflecting slow implementation of the National Electricity Plan of 2023 and grid, storage, and integration bottlenecks. Peak demand outside solar hours continues to be met by gas plants. Current policies can still deliver India's 2030 goals, but projected 2030 emissions keep rising. Priorities for India are to fast-track grid and storage expansion, close the auction-to-commissioning gap for renewable energy, avoid new gas lock-ins, implement a time-bound coal phase-down with steep cuts this decade, and submit a strong 2035 target.

After a year in office, **INDONESIA**'s Prabowo-Gibran administration has pushed for self-sufficiency in food and energy alongside an ambitious 8% economic growth target, often at the expense of environmental integrity. While headline commitments such as its net zero target remain in place, recent developments indicate weakening domestic ambition. Overall, Indonesia's progress in transitioning to a low-carbon economy across critical sectors remains limited. Power generation and industry remain heavily reliant on coal, while land use emissions persist due to agricultural and commodity-driven deforestation. The National Electricity Supply Business Plan (2025–2034) sets higher targets but prioritises fossil fuel expansion over renewables. The National Electricity Master Plan (2024–2060) allows substantial new coal capacity to power nickel and mineral processing, locking in emissions, deepening fossil dependence, and risking energy oversupply.

**MOROCCO**'s near-term climate targets are within reach, as the country is on track to meet its unconditional 2030 emissions reduction target. Ahead of COP30, the government submitted its new climate pledge, which for the first time includes a commitment to phase out coal by 2040, conditional on international support – a significant milestone for a country where coal still generates over 60% of electricity generation. Although in recent years, Morocco has made significant progress in deploying renewable energy, this growth has not yet displaced coal in the power sector. At the same time, the government aims to expand fossil gas use across the economy by increasing imports, and it also recently opened the door to domestic exploration by signing offshore exploration contracts with international gas companies. This strategy risks locking the country into a high-emission trajectory.

**NEW ZEALAND** has experienced a major reversal in its climate policy landscape over the past two years, marked by a massive rollback of economy-wide decarbonisation measures. The government submitted its 2035 target in January 2025, which could allow higher emissions than under its 2030 goal, and formally withdrew from the Beyond Oil & Gas Alliance, signalling weakened international climate engagement. This new climate target is accompanied by many ambition-weakening regulatory and policy changes. For example, in the agricultural sector, responsible for over half of New Zealand's emissions, the government plans to nearly halve the 2050 methane reduction target. Transport standards have also been weakened, and the ban on offshore oil and gas exploration has been lifted. New legislation enables fast-tracked, carbon-intensive projects, while major decarbonisation funds and incentives have been withdrawn in favour of a NZD 200 million co-investment for new gas exploration.

**NIGERIA** submitted its 2035 NDC, introducing an updated 2030 target and a new 2035 target, both aligned with a 1.5°C pathway but conditional on international financial support. These targets are consistent with the 2060 net zero objective set out in the Long-Term Low Emission Development Strategy, although Nigeria's overall climate governance remains fragmented. Emissions remain on an upward trajectory as the government continues to rely on fossil gas as a domestic "transition" fuel, risking stranded assets and slowing the country's energy transition. Mixed messages in the energy sector continue as the government emphasises the need to transition to renewable energy in on- and off-grid generation but also seeks to expand fossil fuel production. Ensuring reliable energy access remains a major challenge in Nigeria.

In its new NDC, **NORWAY** committed to reducing emissions by 70–75% below 1990 levels by 2035. While its 2030 and 2035 targets are 1.5°C aligned compared to modelled domestic pathways, stronger domestic policies will be needed to achieve them. Norway continues to lead globally in electric vehicle adoption, with zero-emission and plug-in hybrid vehicles accounting for 94% of new sales in 2024, keeping it on track to phase out fossil fuel cars by 2025. As the power sector is already almost fully decarbonised, cutting transport emissions remains a key focus, though progress in agriculture and land use lags behind. More importantly, Norway continues to profit off the production and export of fossil fuels while publicly proclaiming its commitment to ambitious climate action, a sharp contradiction at the heart of the world's "greenest" petrostate.

Social and political turbulence is ongoing in **PERU**, where increasing political instability is challenging climate policy development and implementation, resulting in missed opportunities and conflicting policies. Peru published its National Climate Change Strategy for 2050, clarifying the 2050 net zero target and establishing an instrument to coordinate Peru's long-term response to climate change. These developments are undercut by continued investment in fossil fuels, as the government has approved new oil extraction projects and plans to increase oil and gas production. Rollbacks in the LULUCF sector threaten to legitimise and even incentivise previously illegal deforestation while harming traditional land-users.

In 2024, the **PHILIPPINES** released its Energy Plan (PEP) 2023–2040, which aims to increase renewable energy's share to at least 35% by 2030 and over 50% by 2040. The government is working to unlock the country's vast wind and solar potential by removing investment barriers, leading to the largest pipeline of renewable projects in Southeast Asia and offering a path toward cleaner and affordable energy. However, while the new Energy Plan reduces reliance on coal and gas compared to previous versions, both fuels are still projected to expand, with gas growing rapidly through new liquefied fossil gas infrastructure that risks creating a new fossil dependency. Coal, which still provides over 60% of electricity, has no phase-out timeline, and new plants exempt from the 2020 moratorium are expected before 2027.

**RUSSIA**'s climate policy is marked by a critical lack of ambition and a steadfast commitment to fossil fuels. The Russian government has not introduced any substantial emissions reduction policies, and its recently released 2035 NDC target —easily achievable with existing policies alone —does not drive ambition beyond current policies. Russia also intends to rely heavily on unmanaged forests to meet its NDC targets, having recalculated the LULUCF sink to double its absorption capacity, effectively meeting its targets with minimum additional effort. At the same time, Russia's new energy strategy entrenches fossil fuel use and production through 2050, projecting the share of coal alone to be ten times larger than that of wind and solar.

**SAUDI ARABIA**'s emissions are on a steep upward trajectory and are projected to continue rising through to 2035. No recent policy developments suggest a shift capable of slowing this growth or reducing the country's dependence on fossil fuels. Despite its "Vision 2030" diversification plan, initiated nearly a decade ago, oil export revenues remain the backbone of the Saudi economy. These revenues, funnelled partly through the Saudi sovereign wealth fund, the Public Investment Fund (PIF), have done little to advance the country's energy transition. The government's stated plans to cut emissions by expanding renewable energy have largely failed to materialise. Saudi Arabia's goal to generate 50% of its electricity with renewables by 2030 remains aspirational at best—renewables only made up 2% of its power mix in 2024, highlighting the persistent gap between ambition and implementation.

**SOUTH AFRICA**'s government is focusing on energy system stabilisation and security, pursuing expansion of both fossil and renewable energy supply. Simultaneously, commendable progress is being made in many of the country's climate policies. The government adopted the Climate Change Act in July 2024 and is progressing with the legal adoption of sectoral carbon budgets. Wind and solar capacity additions are beginning to ramp up with the share of wind and solar generation tripling between 2019 and 2024, to just under 12.5%. However, South Africa also continues to add new fossil fuel generation to the system, with two large capacity additions made to an existing coal plant in 2024 and 2025. Progress in other emitting sectors is slow with a lack of detailed planning on how to mitigate emissions from transport, buildings and industry.

**SOUTH KOREA** stands at a crossroads in its energy transition. Following the impeachment of President Yoon, whose administration had reversed the country's nuclear phase-out and deprioritised renewable energy development, the newly elected President Lee and his government have signalled intentions to expand renewable energy. However, substantive policy changes have yet to be defined or implemented. The 11th Basic Plan for Electricity Supply and Demand, prepared under the previous administration, projected South Korea's renewable energy generation to account for 22% of total electricity generation in 2030, down from the 30% target set out in the NDC, while maintaining a heavy reliance on nuclear and fossil gas with no clear plans to phase out coal. Emissions reduction efforts may also be limited by the industrial sector, South Korea's largest energy consumer, where decarbonisation is progressing slowly and policy measures, including the Korea Emissions Trading Scheme (K-ETS), remain limited in scope or effectiveness.

In 2024, **SWITZERLAND** adopted the Federal Act on a Secure Electricity Supply with Renewable Energies, which lays the foundation for major renewable expansion and deep electrification. This new law is expected to deliver more than a sevenfold increase in solar and wind generation between 2023 and 2035. However, this progress is overshadowed by the government's refusal to respond to the European Court of Human Rights ruling that found its climate policies inadequate. Switzerland also continues to fail to define the domestic share of its NDC targets and continues to rely on bilateral international offset deals, raising concerns over credibility and transparency.

Despite recent progress in expanding wind and solar energy, **TÜRKIYE**'s plans to increase its reliance on fossil fuels cast doubt on the government's climate ambitions. The new Climate Law, passed in July 2025, lays the foundations for a Turkish emissions trading system (ETS) modelled on the EU's and enshrines Türkiye's net zero and NDC targets into law —a long-awaited move by the Grand Assembly. However, the government's efforts to boost fossil gas production, position Türkiye as a supply hub for Europe, and continue its coal use, jeopardise its net zero goal and risk locking the country into a high-emissions pathway. To demonstrate to the world that it would be an adequate host of COP31 with strong climate action, Türkiye needs to strengthen its emissions reduction target for 2030, submit a 2035 target aligned with 1.5°C, develop a coal phase-out plan, and curb investments in fossil fuels.

The **UNITED ARAB EMIRATES** continues to show a lack of sufficient policies to reach its ambitious 2035 targets. Latest estimates indicate that the UAE's power sector will continue growing at approximately 3.8% annually until at least 2035, and without a clear plan to phase out fossil fuel-based power generation, this alone calls into question how the country realistically expects to be able to decrease emissions by 44% below 2019 levels in 2035. According to its current energy planning, fossil fuels are still expected to contribute 50% of the country's energy needs by 2050.

The **UNITED KINGDOM**'s climate policy has improved over the last year, with the implementation gap closing and its NDC targets becoming more achievable. However, this effort needs to be sustained. Current efforts are not enough to bring the UK in line with a 1.5°C compatible pathway. Recently announced efforts to increase the share of renewables to >95% of electricity generation is commendable and will place the UK in line with other European leaders. However, cuts to official development negate some of these domestic gains and set the UK in the wrong direction in terms of meeting its fair share of the global mitigation effort.

The **UNITED STATES**, under the Trump Administration, is aggressively and comprehensively dismantling climate change mitigation targets and policies. After taking office, the new government quickly initiated the US's withdrawal from the Paris Agreement, nullifying the government's emissions reduction targets for 2030, 2035, and 2050. The enactment of the One Big Beautiful Bill Act (OBBB) obstructs the deployment of renewable energy – especially wind and solar – as well as the uptake of electric vehicles and other clean energy technologies.

Meanwhile, the government is incentivising the production and consumption of fossil gas, oil, and coal. Under the administration's direction, the US Environmental Protection Agency (EPA) is poised to revoke key emissions regulations in the power and transport sectors, regulations that were strengthened under the Biden Administration. In combination, the Trump Administration's agenda will significantly slow emissions reductions, putting the US even further off track from aligning with a 1.5°C trajectory.

Despite critically lacking ambition in its 2030 climate targets, **VIET NAM** is showing growing momentum toward renewable energy integration and a gradual coal phase-out in line with its 2050 net zero goal. The revised 2025 Power Development Plan 8 and the 2024 Electricity Law mark stronger long-term alignment with the clean energy transition, featuring ambitious targets for solar and offshore wind. However, implementation remains uncertain, and continued reliance on coal and fossil gas risks locking in high emissions and deepening energy security concerns. Economic growth assumptions and rising electricity demand continue to justify fossil fuel expansion, including the revival of nuclear power as a future option.

# Authors


## Climate Analytics

Sofia Gonzales-Zuñiga
Sarah Heck
Claudio Forner
Bill Hare
Sally Dacie
Zarrar Khan
Marie-Charlotte Geffray

With support from:
Andreas Geiges

## NewClimate Institute

Ana Missirliu
Janna Hoppe
Louise Jeffery
Frederic Hans
Niklas Höhne

**Editing**
Cindy Baxter
**Design**
Designers For Climate Studios



**Acknowledgments**
We would like to thank the wider CAT team for their work on country assessments, which contributed to this briefing.

The analysis of the new 2035 NDC submissions in this report was made possible with the generous support of the institute for Climate and Society (iCS).


# CAT The Consortium

The Climate Action Tracker (CAT) is an independent scientific analysis produced by two research organisations tracking climate action since 2009. We track progress towards the globally agreed aim of holding warming well below 2°C, and pursuing efforts to limit warming to 1.5°C.

Climate Analytics is a non-profit institute leading research on climate science and policy in relation to the 1.5°C limit in the Paris Agreement. It has offices in Germany, the United States, Togo, Australia, Nepal and Trinidad and Tobago.

NewClimate Institute is a non-profit institute established in 2014. NewClimate Institute supports research and implementation of action against climate change around the globe, covering the topics international climate negotiations, tracking climate action, climate and development, climate finance and carbon market mechanisms. NewClimate Institute aims at connecting up-to-date research with the real world decision making processes.

Institute for Essential Services Reform (IESR) is an energy and environment focused think-tank that aims to accelerate the energy transition by supporting sustainable mobility, green economy, and well designed climate change policy. IESR has experience mainly in Indonesia, but is expanding its focus to work in other regions and countries.