

State of EV Market and EV Policy – General Motors



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Electric Vehicle Policy Levers

Principles of Policy

- Combinations of “**carrots and sticks**” working in concert with each other to influence and respond to market conditions
- Industries look for **stable and durable** policies

Regulatory

- **Greenhouse Gas / Emissions**
- **ZEV Mandates**
- **Fuel Economy**
- Recycling
- Safety
- Chemicals

Technology Incentives

- Consumer
- Manufacturing
- R&D Funding
- Forms of Tax credits, or no sales tax
- Grants or Loans

Trade

- Import and Export
- Tariffs
- New market advantages

Setting Priorities

Federal

- Executive
- Legislative
- Judicial

State/Local

- Executive
- Legislative

“Connected” Policies



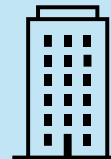
Road Funding/Gas Tax



Public Infrastructure



Residential Infrastructure



Multi-Family Housing



Labor

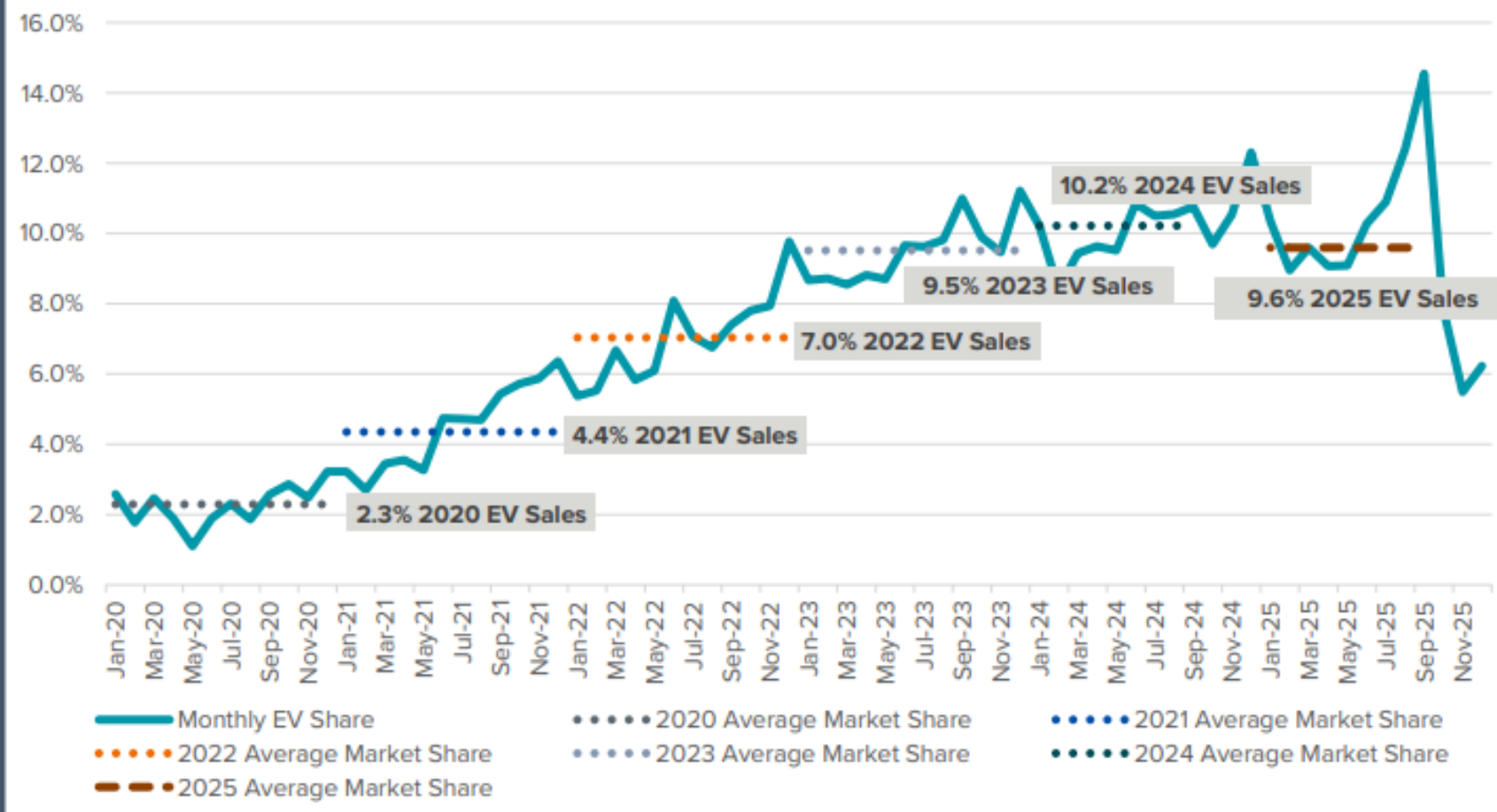


Utility & Permitting

State of the US EV Market



EV MARKET SHARE: JANUARY 2020 - DECEMBER 2025



U.S. EV Market Key Data Points thru 2025:

- **7.3 M EVs on U.S. roads**
 - Represents ~2.5% of all Vehicles In Operation
- **>70k DC Fast Charge ports**
 - 18k installed in 2025 alone (most ever)
 - Port-to-station ratio increasing
 - Charger reliability rapidly improving
- **100 EV nameplates available**
 - All shapes, styles, and price points – Cars, SUVs, Pickups
- **11 states** have active retail EV incentive programs
- **Used EV market** set to surge in 2026-27 with off-lease EVs

Source: Auto Innovators Get Connected Report Q4 2025

Note: Includes Plug-In Hybrid Sales

12 EVs: From Bolt to Escalade IQ



Chevrolet Bolt



Chevrolet Equinox EV



Chevrolet Blazer EV



Chevrolet Silverado EV



GMC HUMMER SUV/SUT EV



GMC Sierra EV



Cadillac OPTIQ EV



Cadillac LYRIQ EV



Cadillac VISTIQ EV

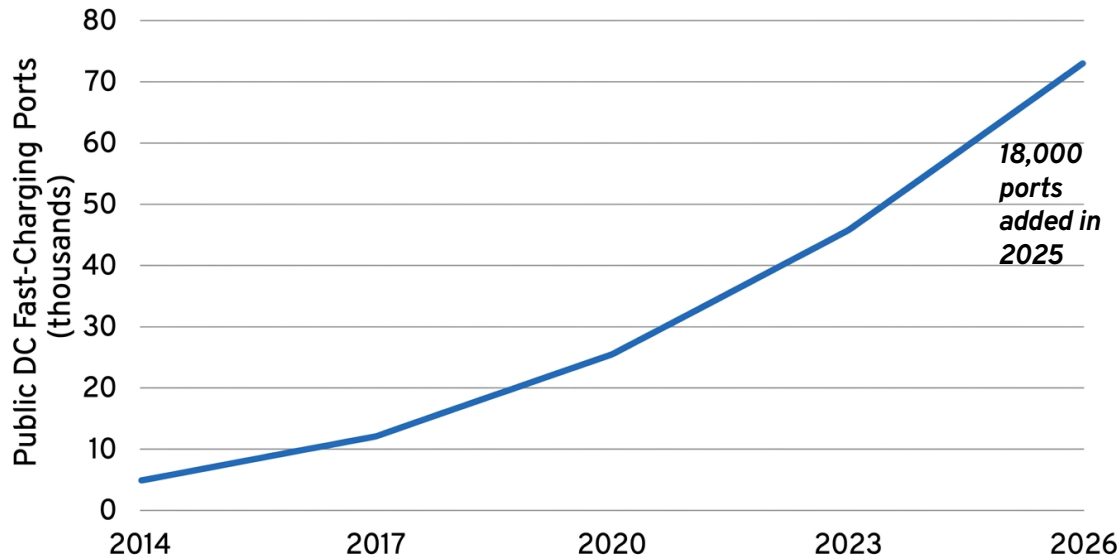


Cadillac Escalade IQ/L EV

Fast Charging - Scale, Visibility, Reliability, Interoperability



U.S. Public DC Fast-Charging Port Growth



ACT. STALLS **4,690** TARGET **35,300** PERC. COMPLETE **13%**

Network	EST. YEAR	CURRENT STALLS	END TARGET	PERC. COMPLETE
EVgo	2021	2,288	2,850 ⁺	81%
Pilot FLYING J.	2023	1,059	1,900 ⁺	56%
-chargepoint+	2024	117	350 ⁺	33%
IONNA™	2024	884	30,000 ⁺	3%

DC Fast Charging Connector Convergence





Building an American Battery Value Chain



U.S. BATTERY CELL MANUFACTURING



LOCALIZING LOW-COST BATTERY TECHNOLOGY

Cell Chemistry

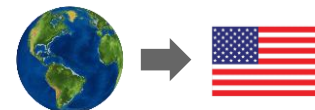


Nickel + LFP + LMR

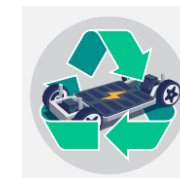
CREATING NEXT-GEN CHEMISTRIES



U.S. BATTERY CELL DEVELOPMENT CENTER FOR FULL PROTOTYPING



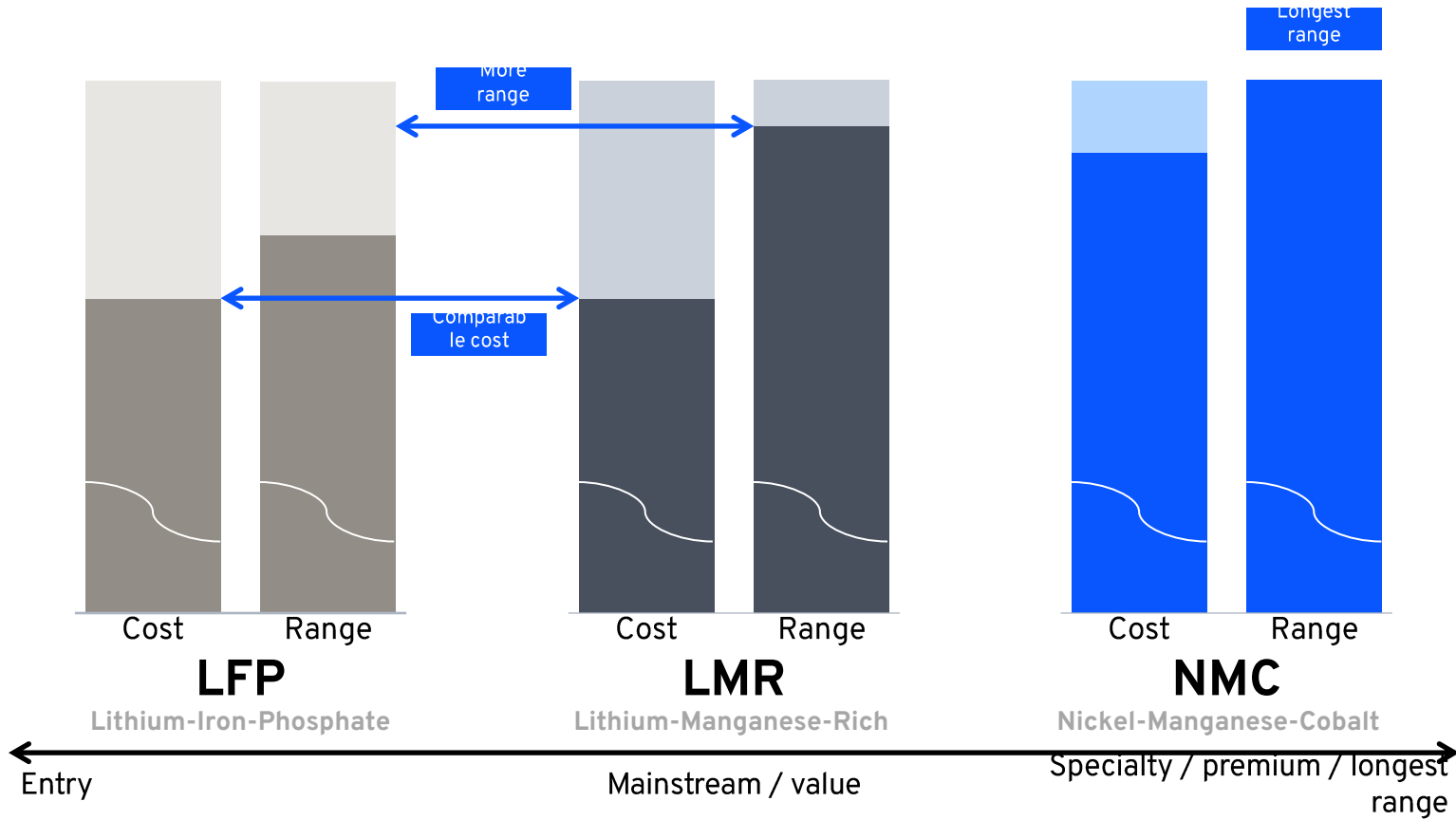
LOCALIZING RAW MATERIAL SUPPLY CHAINS AND PROCESSING



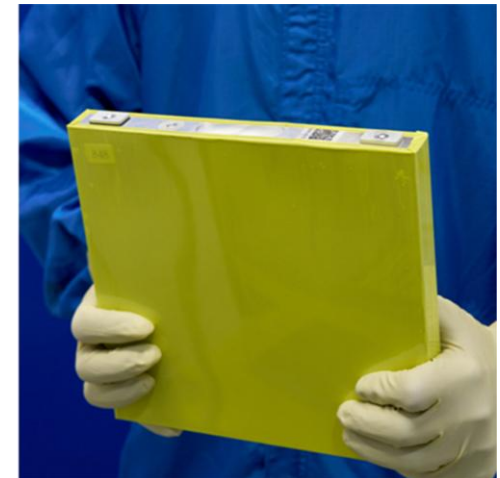
EV BATTERY RECYCLING LEADERSHIP

Flexible chemistries to meet customer needs

Deliver the best mixture of range, performance, and cost



LMR:
Premium Range
+
Affordable Cost
=
Game Changing Chemistry



All 12 GM EVs are bidirectional capable, meaning they can provide power to the home and eventually to the grid

- EVs can support reliability and resiliency through vehicle-grid integration (VGI)
- GM Energy's Vehicle-to-Home Enablement Kit allows the vehicle battery to serve as backup power during an outage
- Across the country, GM is working with utilities to create programs that encourage customers to consume energy when the grid is less constrained
- GM is also working to demonstrate Vehicle-to-Grid (V2G) technology value to encourage wide-scale adoption by utilities



EV Enablers | Consumer research & analysis has identified the most critical areas that the industry must continue to address to enable mass adoption of EVs



Product Based Enablers



Portfolio
Entries

Broad variety body styles & sizes



Range

Median preference up to 350 miles, may reach 400 by 2030



Styling

Attractive & innovative—same expectations as ICE vehicles



Price/
Cost (Vehicle +
operation)

Pricing close to Gas vehicles, eventually reaching parity

Ecosystem Based Enablers



Public
Charging

More public charging stations with faster charging



Home
Charging

Ease and cost of home charger install



Battery
Concerns

Address uncertainty on battery life, warranty & replacement costs



Familiarity/
Awareness

Education needed—strongly linked to consideration

