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General Motors Group Vice President and
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GM LAAM Region

- 3 continents and 84 countries
- 4 major languages spoken
- >36,000 employees and >1,000 dealers
- Manufacturing plants in 8 countries
- \$19 billion revenue in 2007 – expect to exceed that in 2008



EMERGING Markets

Energy

DIVERSITY



GM

Global Update

GMNA Region

- Reduced manufacturing capacity to meet consumer demand
- Re-negotiated labor contracts and health care agreements
- Reduced structural costs by \$9 billion
- Introduced successful new cars and crossovers
- Oil price increases are affecting U.S. auto industry sales mix

GMNA Region

Additional Actions Due to Oil Price Increases

- Increasing production of smaller, more fuel-efficient cars at two plants
- Idling four plants that build trucks and SUVs
- These actions will cut an additional \$6 billion by 2010/2011
- Approved funding for production of the Volt

GM Europe Region

- Developed markets in Western Europe
- Emerging markets in Eastern Europe
- Spectacular growth in Russia
 - <5,000 vehicles sold in 2001
 - **260,000** vehicles sold in 2007

GM Asia-Pacific Region

- Strong performance in China
 - Sales grew 18.5% in 2007
 - GM first automotive manufacturer to sell over 1 million vehicles
 - 74% sales increase in India
 - Exported 870,000 GM Daewoo vehicles built in Korea
- 
- A world map is visible in the background, with the Asia-Pacific region highlighted in a darker green color. The map shows the continents of Asia, Australia, and parts of Africa and Europe.

GM LAAM Region

- Record 1.2 million vehicle sales in 2007
- Record \$19 billion revenue in 2007
- Record 2008 First Quarter
 - Revenue up >33%
 - Sales volume up 20%
- Expect growth to continue

GM Priorities

- Execute flawless launches and strengthen our brands
- Continue GME and GMNA turnarounds
- Maintain strong liquidity position
- Build technological capability



EMERGING Markets

Energy

DIVERSITY

A world map is centered in the background, rendered in a light blue color against a darker blue background. The map shows the continents of North America, South America, Europe, Africa, and Australia. The text is overlaid on the map.

In 2007 **GM**
Sold **MORE** Vehicles
OUTSIDE of the **U.S.**

A blue-tinted world map is centered in the background, showing the continents of North America, South America, Europe, Africa, and Australia. The map is overlaid on a dark blue gradient background with some light streaks.

2007

71 Million Global
Industry Sales

Global Vehicle Sales

- Global industry sales in emerging markets
 - 2007: 38%
 - 2012: 45%
- Q1 2008: 64% of sales from outside U.S.
- Top 5 GM markets (in order): U.S., China, Brazil, U.K. and Canada



Embrace

DIVERSITY



One GLOBAL
Company

Global Engineering and Design Centers



Architecture Development Teams

U.S.

- Luxury RWD Vehicle
- Compact Crossover
- Performance Vehicle
- Full-size Truck
- FWD Truck
- Vans Commercial Truck

Germany

- Compact Vehicle
- Mid-size Vehicle

Korea

- Small Vehicle
- Mini Vehicle

Brazil

- Int'l Mid-size Truck

Australia

- RWD Vehicle

Global Manufacturing Footprint





GM ENERGY STRATEGY

Meeting the challenges





PETROLEUM

96% of transportation energy



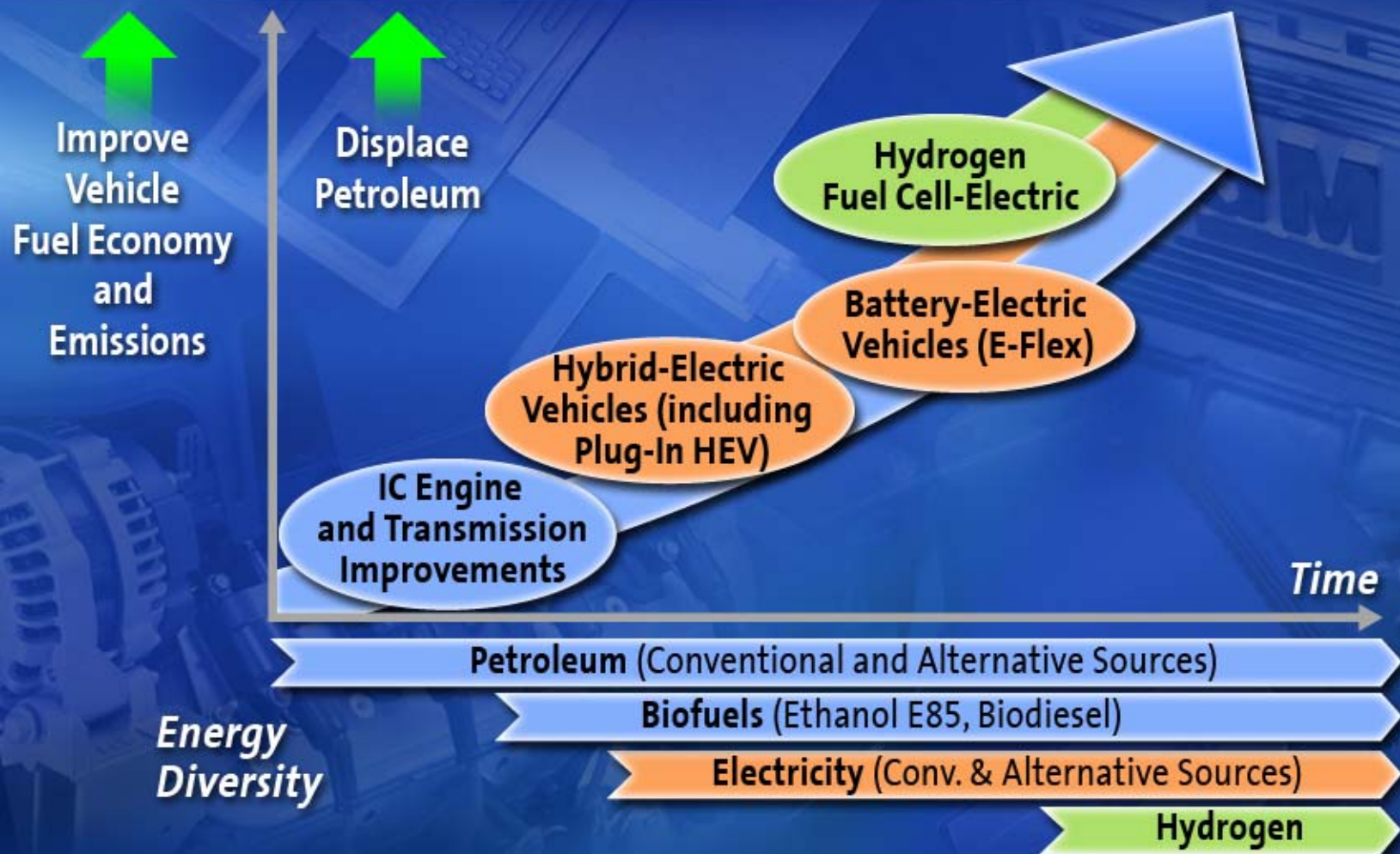


GM ENERGY STRATEGY

Displace **petroleum** through
energy **efficiency** and **diversity**



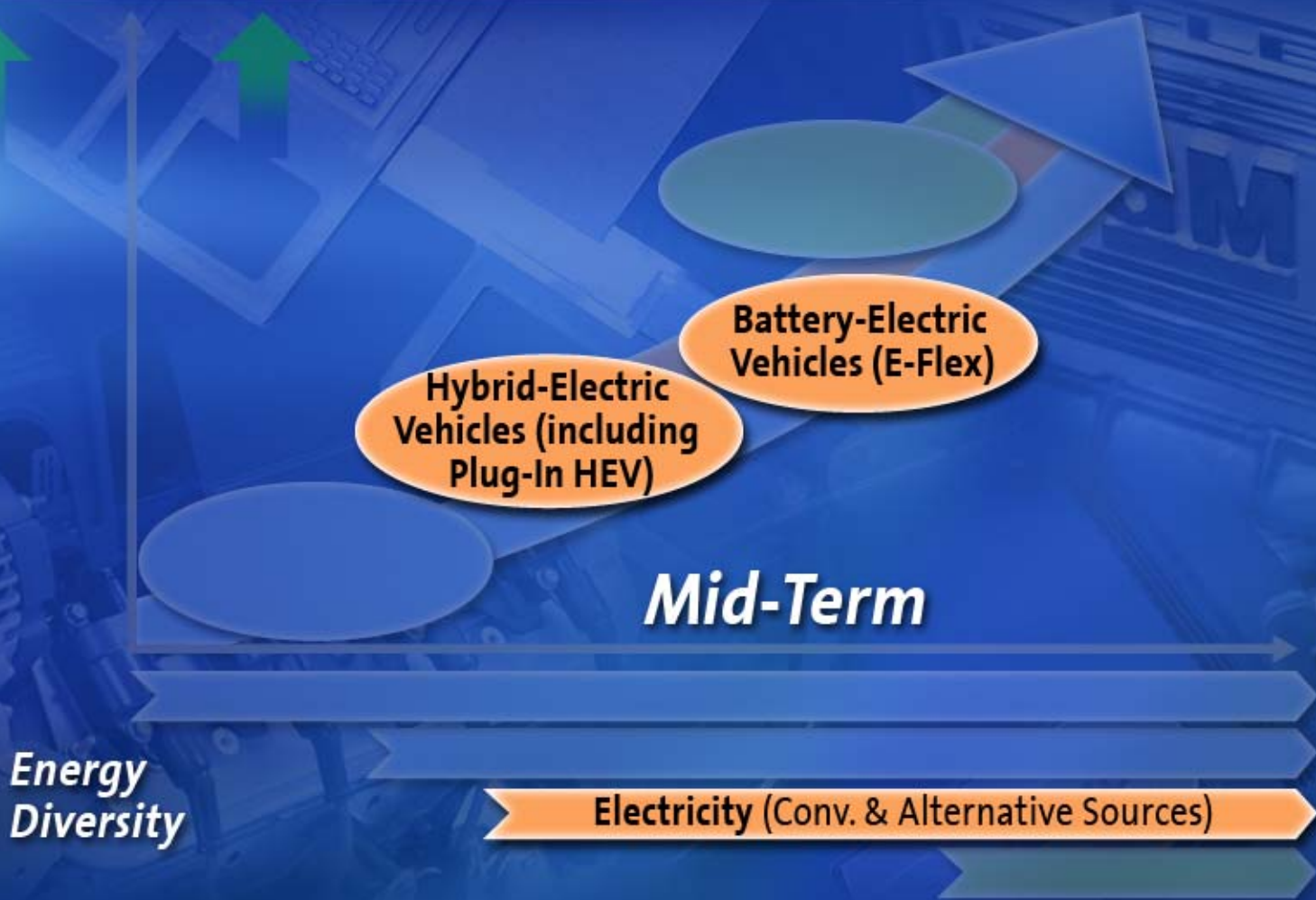
Advanced Propulsion Technology Strategy



Advanced Propulsion Technology Strategy



Advanced Propulsion Technology Strategy



Hybrid-Electric
Vehicles (including
Plug-In HEV)

Battery-Electric
Vehicles (E-Flex)

Mid-Term

**Energy
Diversity**

Electricity (Conv. & Alternative Sources)

Advanced Propulsion Technology Strategy



Gas-friendly to gas-free.



FUEL EFFICIENCY



E85 ETHANOL



HYBRID



ELECTRIC



FUEL CELL

GREEN BY DESIGN 
Canada 

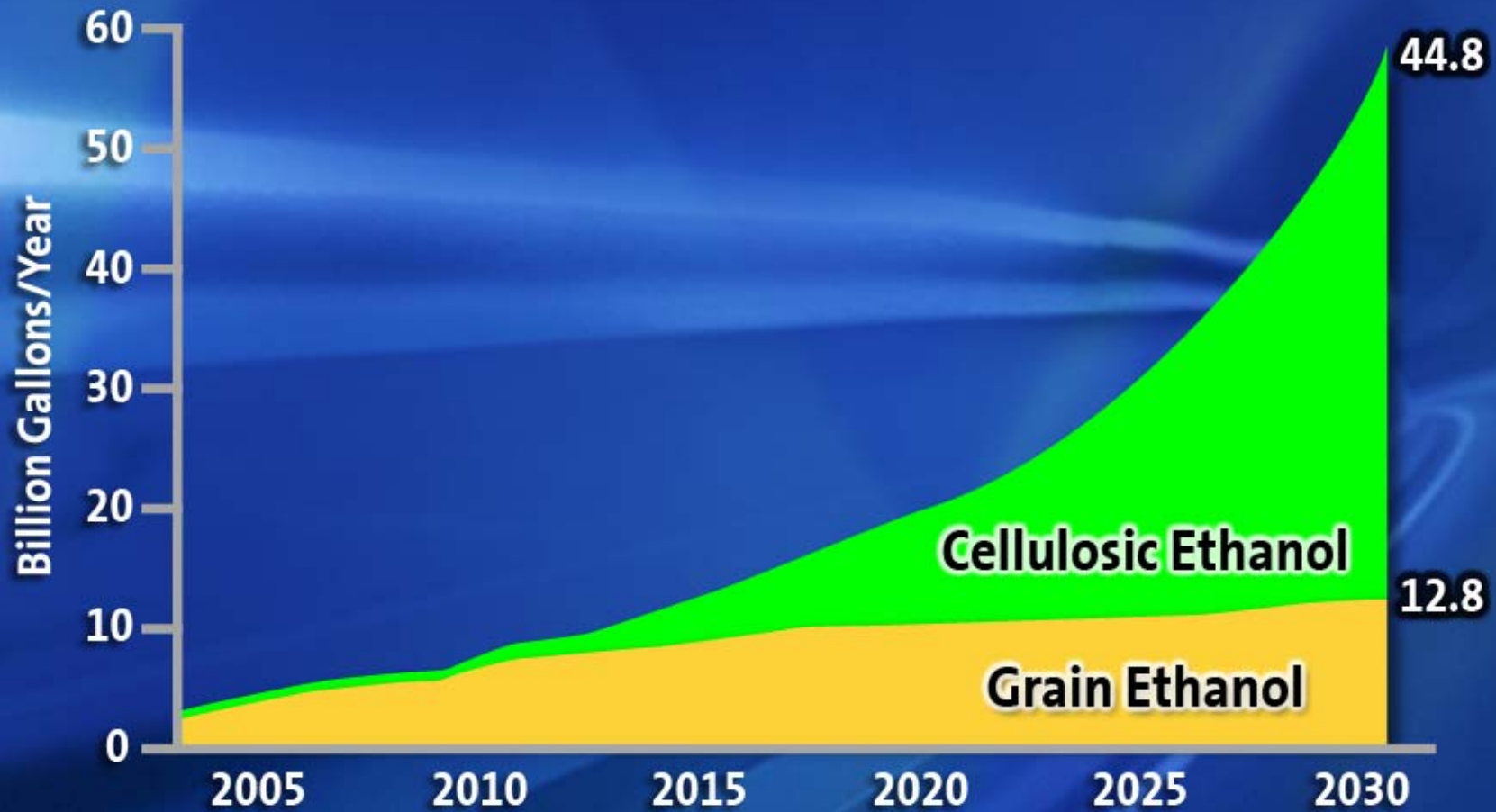


BIOFUELS

Benefits of Biofuels

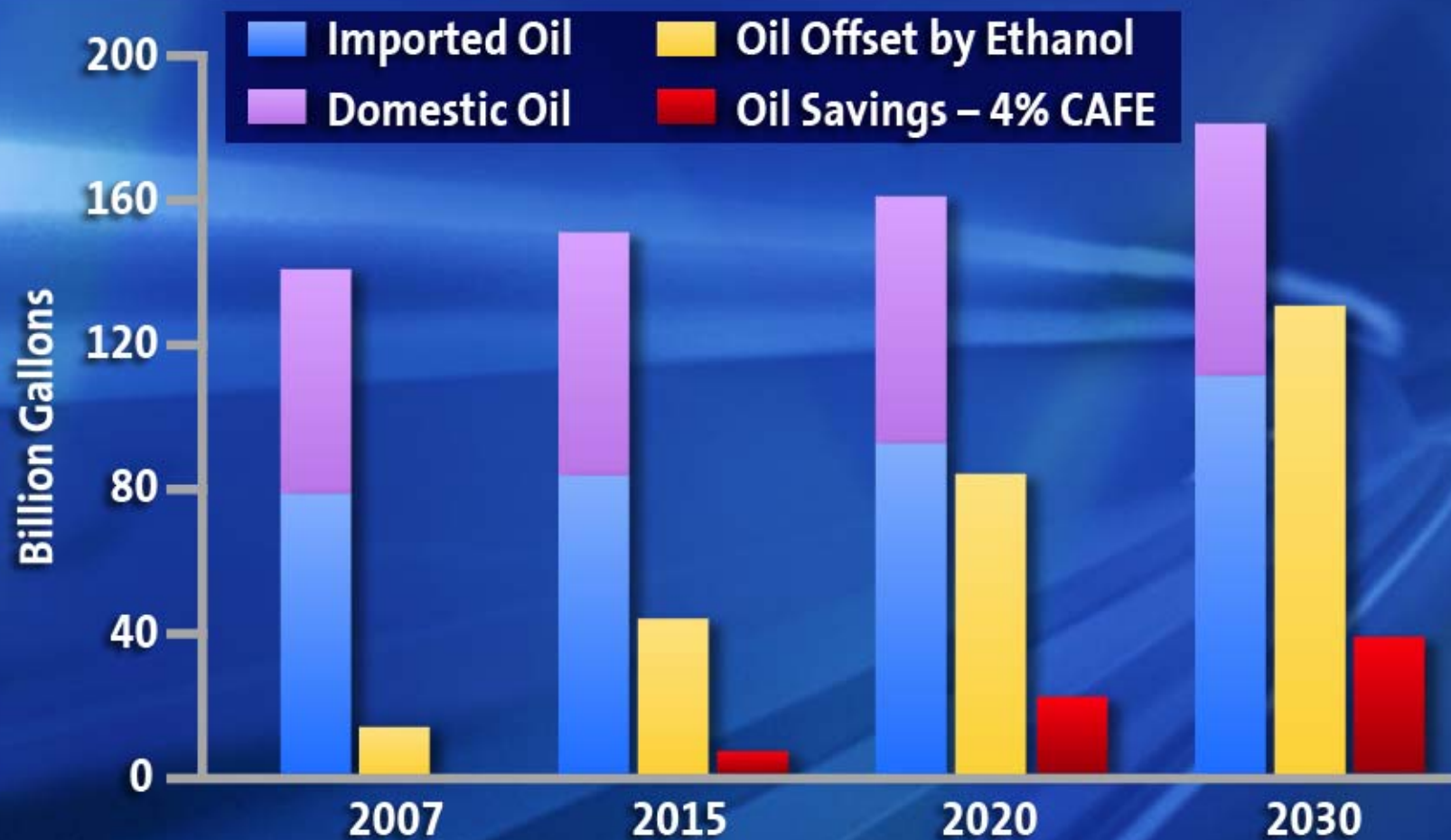
- Reduce greenhouse gas emissions
- Improve horsepower and torque
- Renewable; domestically produced
- Minimal modifications allow use in current gasoline vehicles
- Provide immediate petroleum reduction

Required Ethanol Growth to Supply 30% of Current U.S. Gasoline Demand by 2030



Source: Oak Ridge National Laboratories

E85 Ethanol Would Have Greatest Potential to Reduce Oil Imports if All OEMs Produced 90% FFV by 2020



Ethanol potential assumes all OEM FFV production of 50% in 2012, 75% in 2015, and 90% in 2020, and the FFV parc uses E85. Adjusted for energy equivalency with gasoline. Oil Info Source: *EIA 2007 Annual Energy Outlook*

GM Flex-Fuel Vehicles

Flexpower

BioPower Saab



FLEXFUEL
E85 ETHANOL





BIOFUELS





MASCOMA



AVAILABILITY and

DISTRIBUTION



GLOBAL Recognition of BIOFUELS

livegreengoyellow.com



HYBRID
2 MODE



HYBRIDS



GM Hybrid Portfolio

2001 2002 2003 2004 2005 2006 2007 2008 2009 2010

2-Mode Hybrid



GM/Allison Hybrid Bus

Light Hybrid



Chevy Silverado/GMC Sierra

Hybrid



Saturn VUE



Saturn AURA/Chevy Malibu

2-Mode Hybrid



Tahoe/Yukon



Escalade



Silverado/
Sierra



Saturn VUE

2-Mode Plug-In

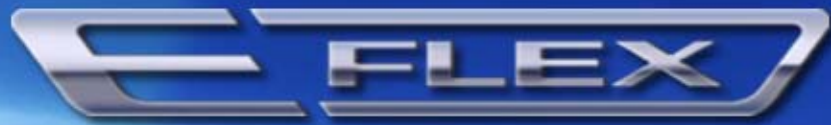


Saturn VUE
(2010+)



HYBRID BUSES
Since 2003

Extended-Range Electric Vehicles



Chevrolet Volt



Opel Flextreme



Cadillac Provoq



ELECTRICITY

< \$1.00 per U.S. Gallon
of Gasoline



Self Serve

402 $\frac{9}{10}$

REGULAR UNLEADED

422 $\frac{9}{10}$

PLUS UNLEADED

432 $\frac{9}{10}$

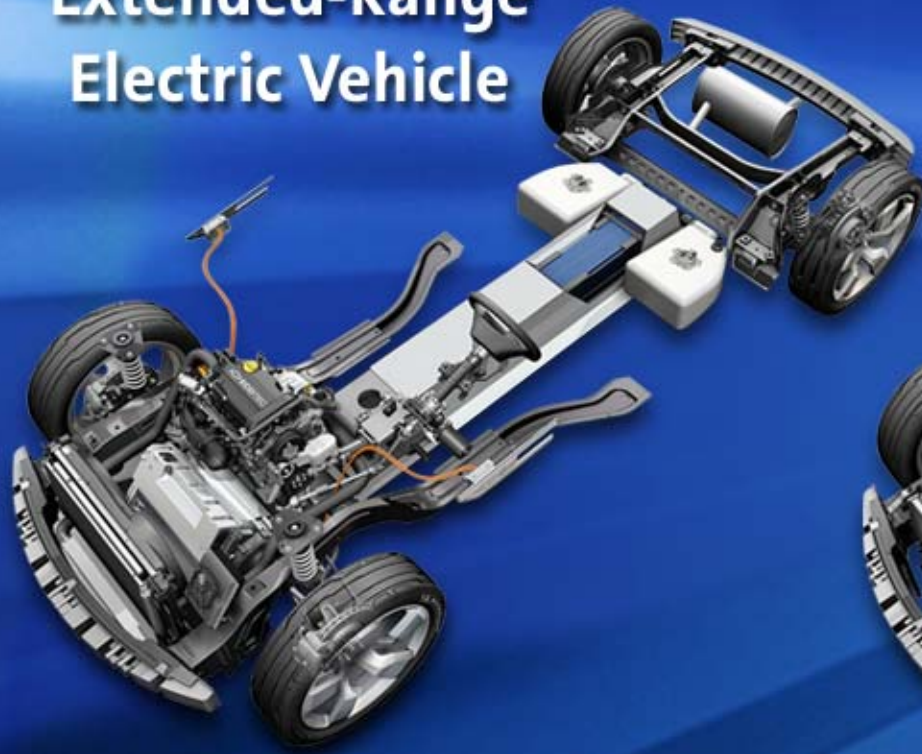
SUPREME UNLEADED

A collage of images related to energy and infrastructure. The top half features a large concrete dam with water flowing through its spillways, set against a backdrop of a forested hillside. To the right, a wind turbine is visible against a clear sky. The bottom half shows a network of large, silver, insulated pipes, likely for geothermal energy, with a hand holding a handful of wood chips in the foreground. On the right side of the bottom half, there are solar panels mounted on a utility pole. The entire collage is overlaid with a semi-transparent white banner containing the text.

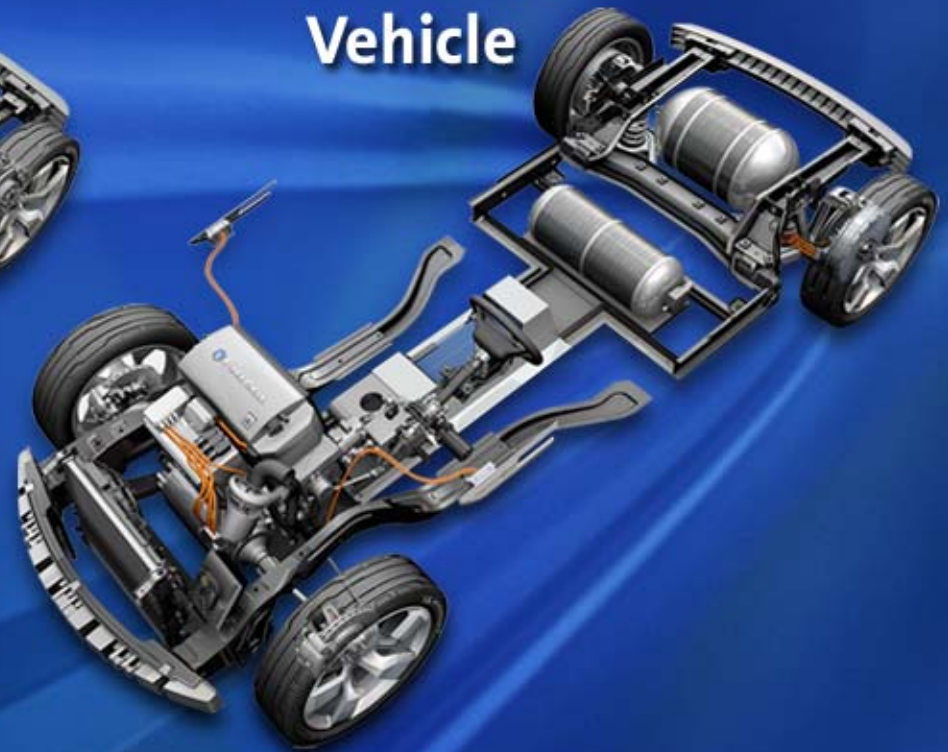
**Off-peak charging could fuel
43% of fleet for 30 mile daily drive**

FLEX

**Extended-Range
Electric Vehicle**



**Fuel Cell
Vehicle**

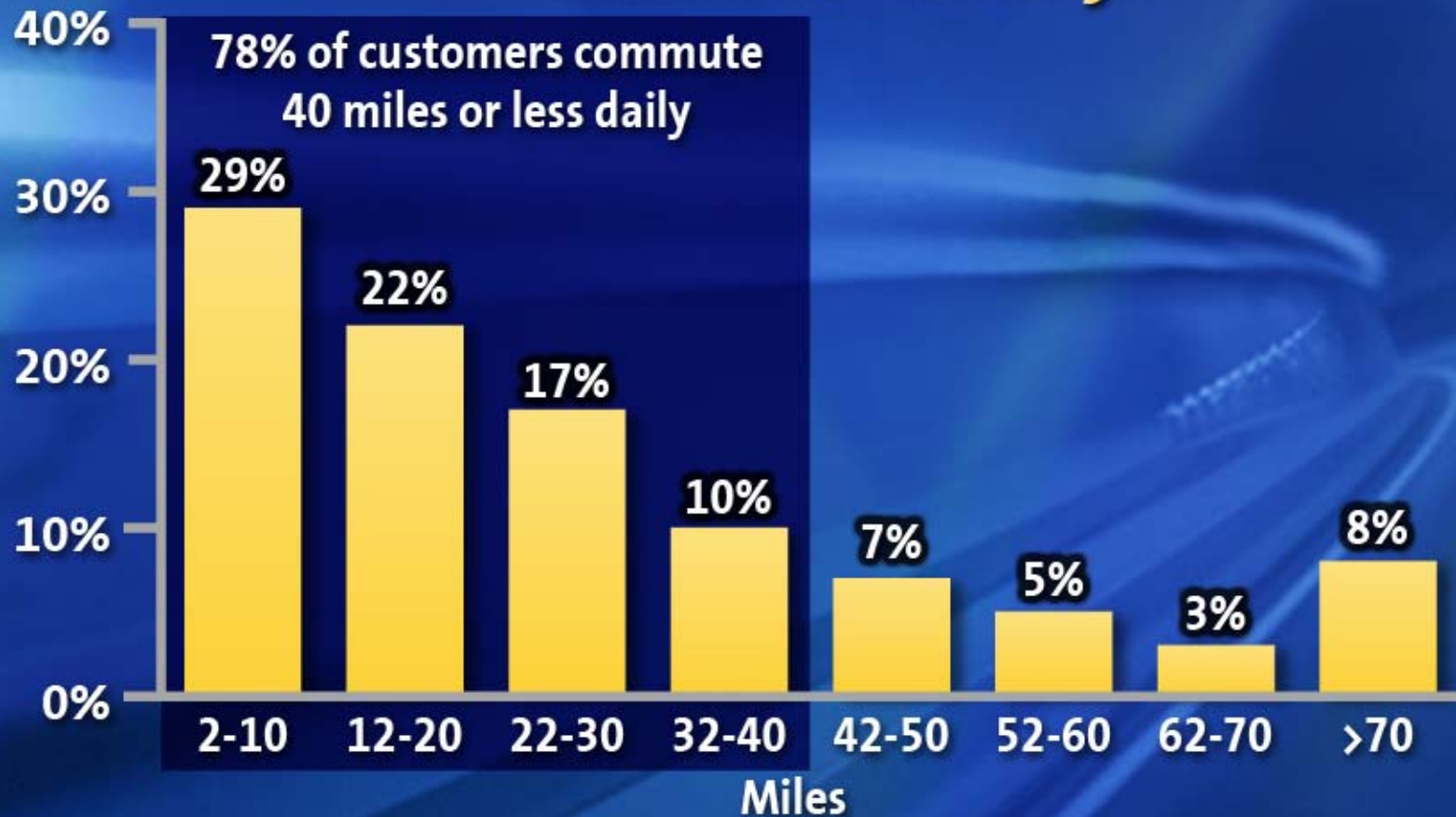


VOLVO



Typical Commute

40 Miles Is the Key



Based on OmniStats Data posted by the U.S. Bureau of Transportation

E-Flex Challenges

- Making lithium-ion technology production-ready
- Currently working with two partnerships to speed development of lithium-ion battery packs
- Speed – simultaneously developing the vehicle and the technology

VOLVO





ELECTRICITY & HYDROGEN

Electricity and Hydrogen

- Right answer for the future
- Can be used interchangeably
- Can be produced from diverse energy pathways
- Can be generated from renewable feedstocks
- Have potential to displace petroleum at an affordable price

The background is a vibrant blue with a central water droplet that has just hit a surface, creating concentric ripples. The droplet is perfectly spherical and reflects light, giving it a three-dimensional appearance. The ripples spread outwards from the point of impact, creating a sense of motion and depth. The overall aesthetic is clean and modern, with a focus on the natural element of water.

Why **hydrogen** is important...

Most abundant element

Can carry energy from diverse sources

Infrastructure could be sited anywhere

Large infrastructure already exists

SEQUUEL



300-MILE SEQUEL DRIVE

Emissions-Free, Petroleum-Free

ZERO EMISSIONS FUEL CELL DRIVE
FINISH



PROJECT DRIVEWAY





MANAGING the
TRANSITION



REMOVE Automobile
from **Energy Equation**



GM Advanced Propulsion Strategy

- Reduce fuel consumption and greenhouse gas emissions
- Be sustainable through energy diversity
- Displace petroleum

