

The Outlook for Energy: A View to 2040

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This presentation includes forward-looking statements. Actual future conditions (including economic conditions, energy demand, and energy supply) could differ materially due to changes in technology, the development of new supply sources, political events, demographic changes, and other factors discussed herein and under the heading "Factors Affecting Future Results" in the Investors section of our website at: www.exxonmobil.com. The information provided includes ExxonMobil's internal estimates and forecasts based upon internal data and analyses as well as publically-available information from external sources including the International Energy Agency. This material is not to be used or reproduced without the permission of Exxon Mobil Corporation. All rights reserved.

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Economic and Energy Evolution

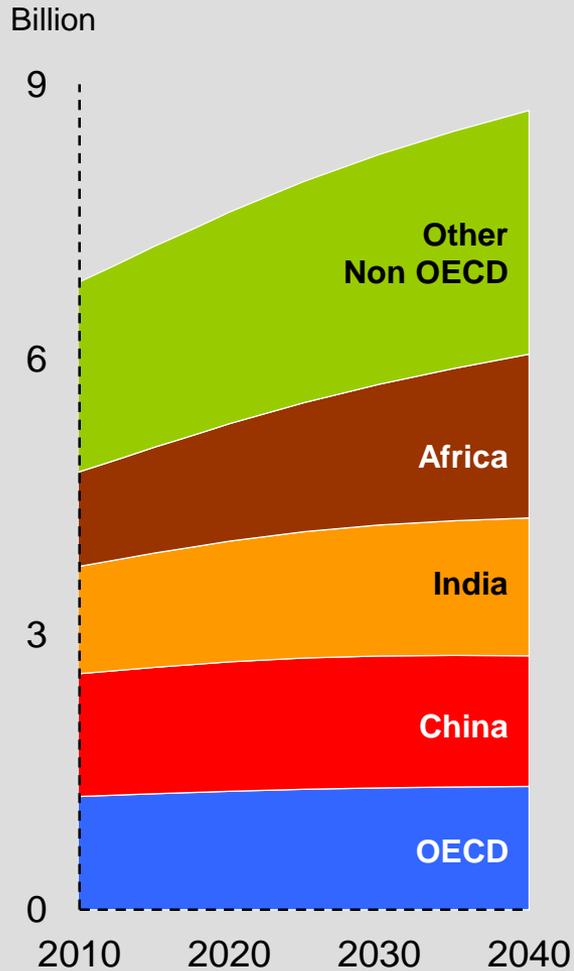
As societies and technologies develop over time...



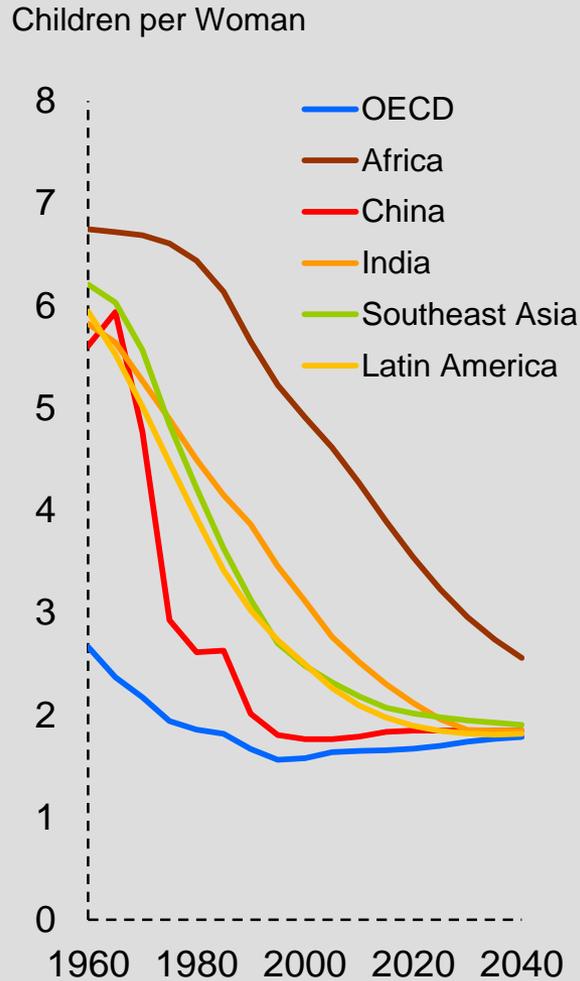
... energy needs evolve as well

Population Trends Impacts Energy Use

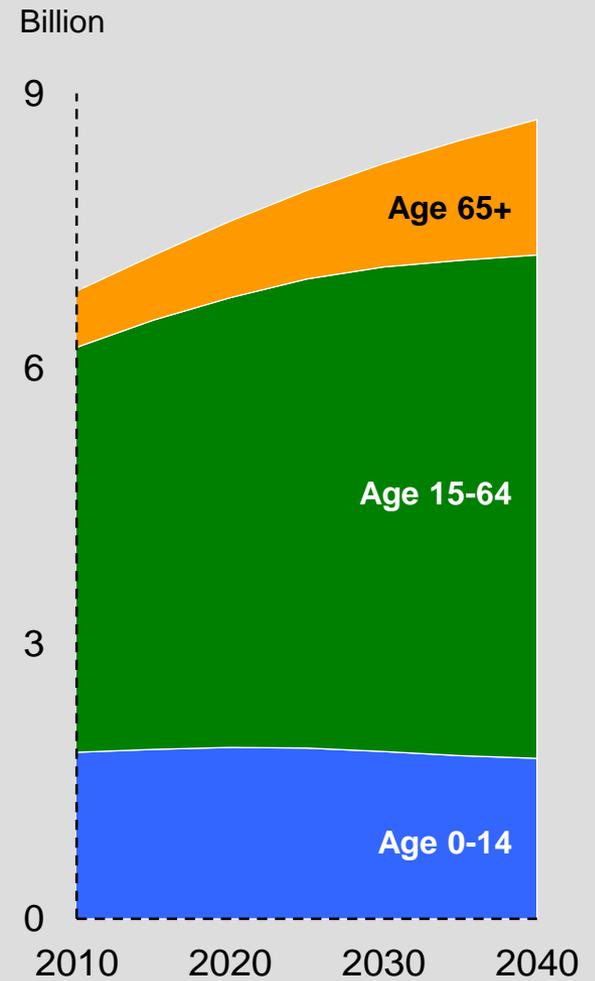
Population



Fertility Rate*



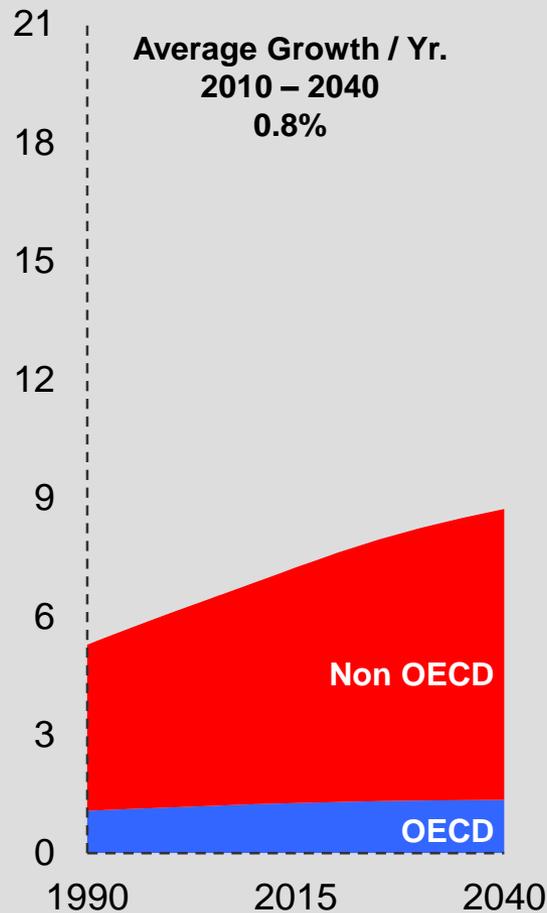
Global Demographics*



Global Progress and Energy Demand

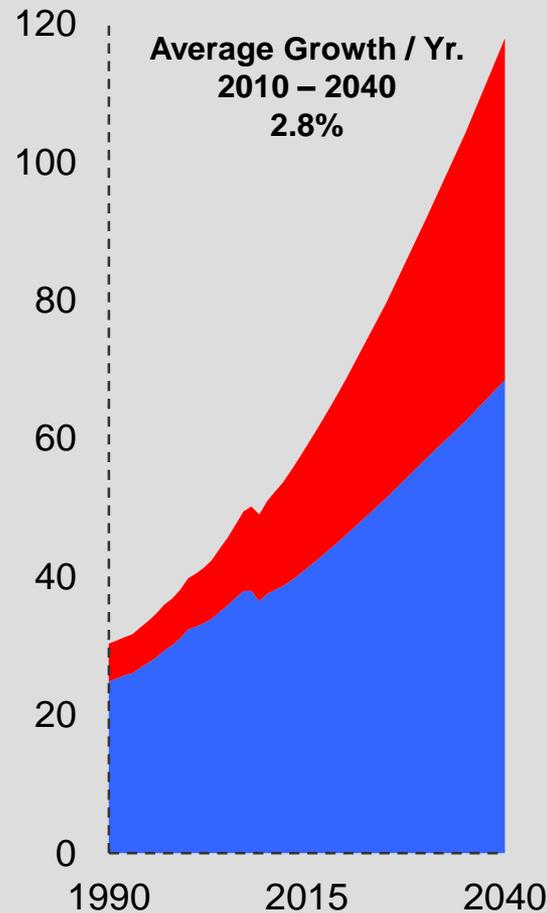
Population

Billion



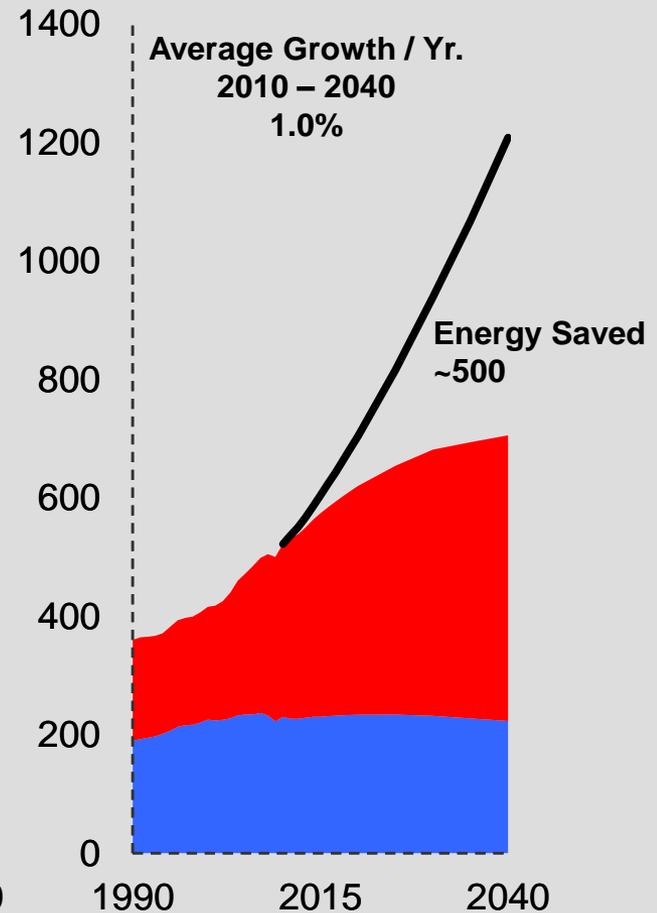
GDP

Trillion 2005\$



Energy Demand

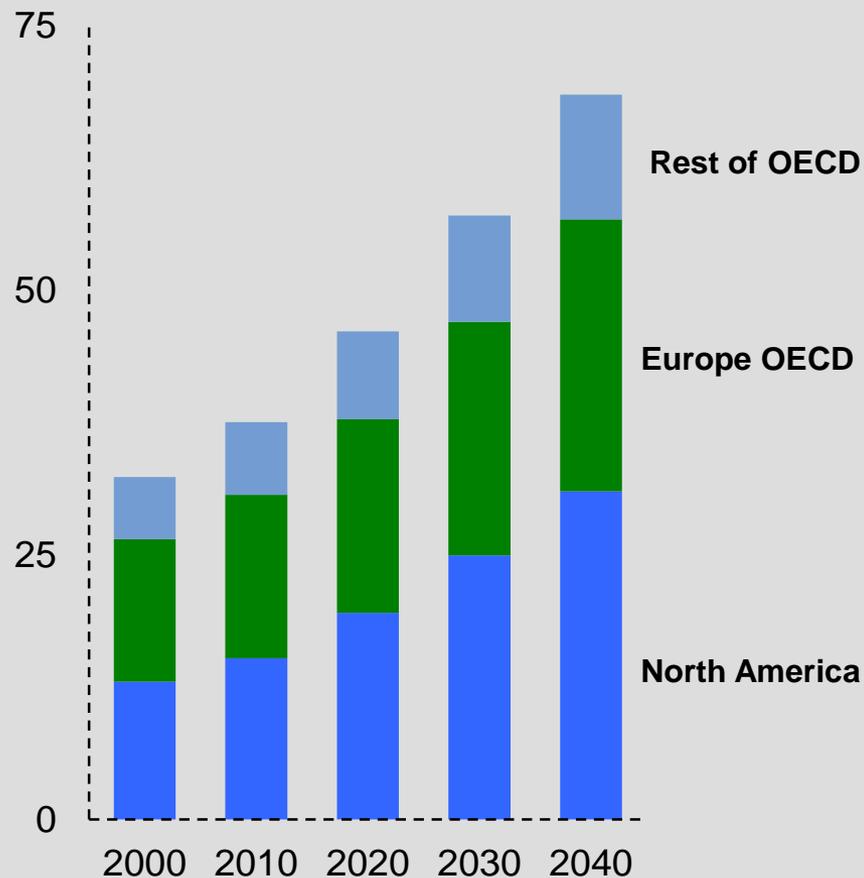
Quadrillion BTUs



OECD

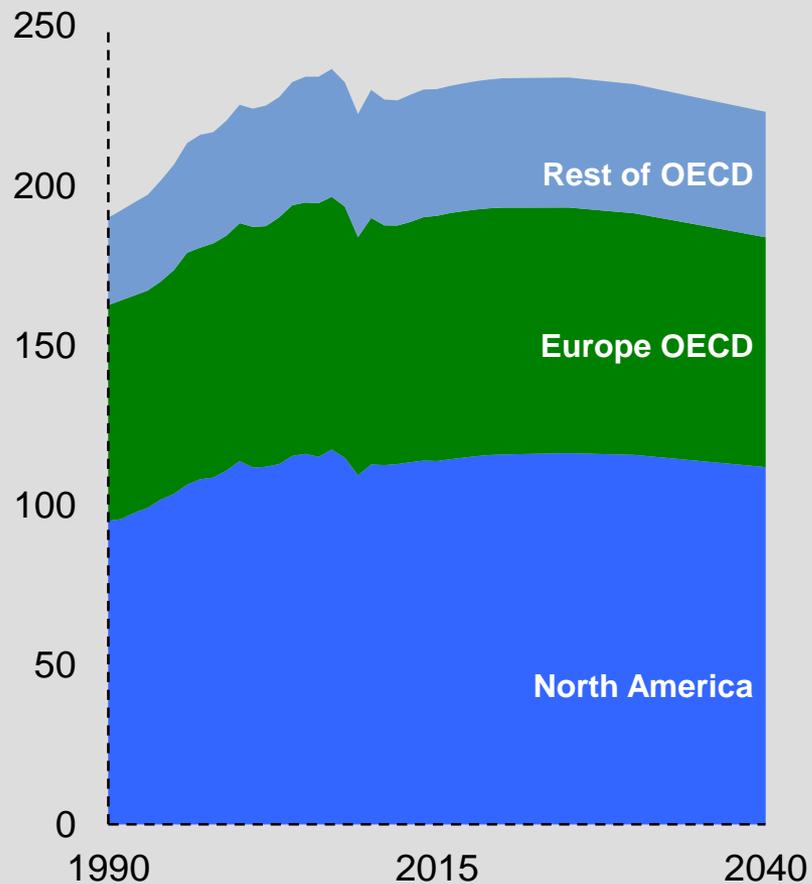
OECD GDP

Trillion 2005 \$



OECD Demand

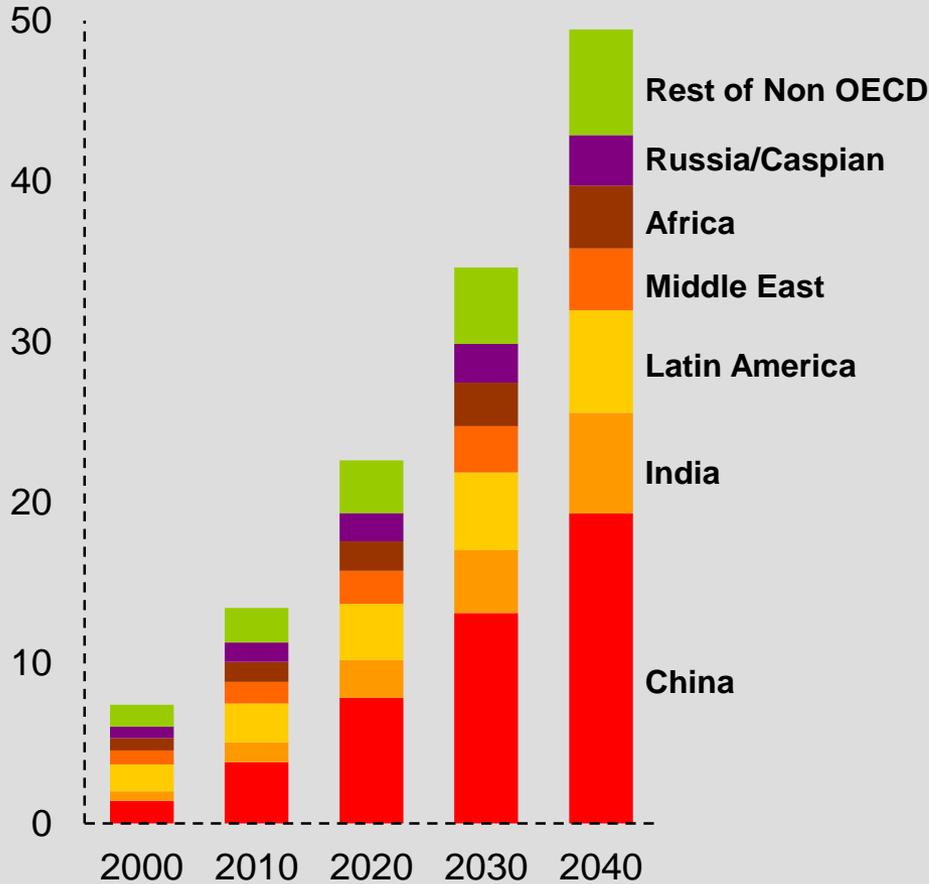
Quadrillion BTUs



Non-OECD

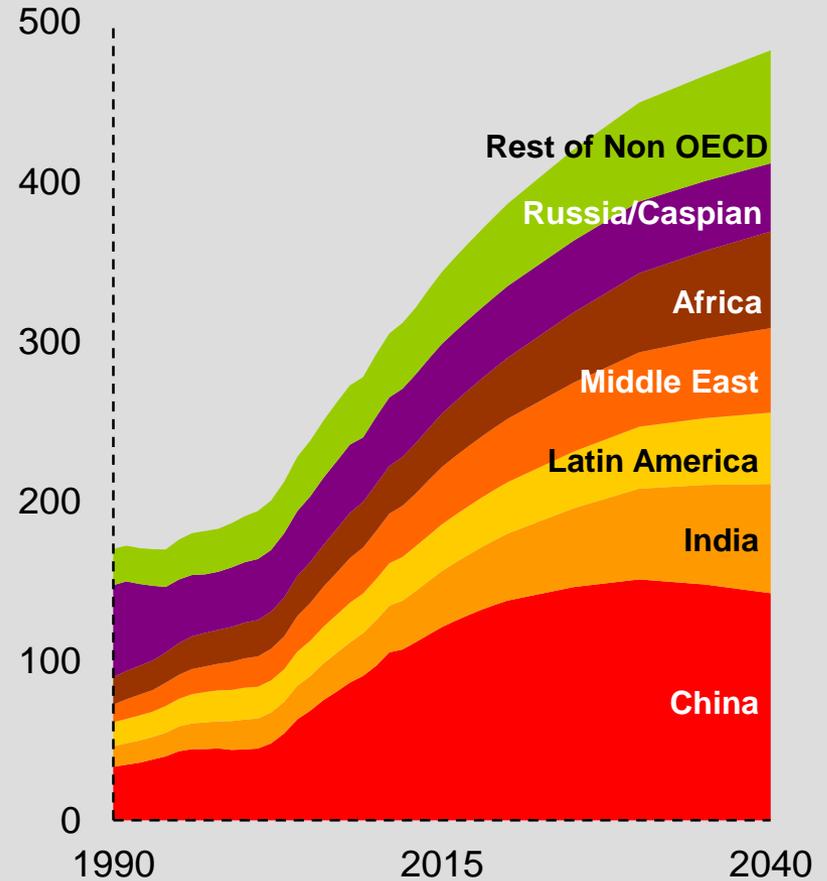
Non OECD GDP

Trillion 2005 \$

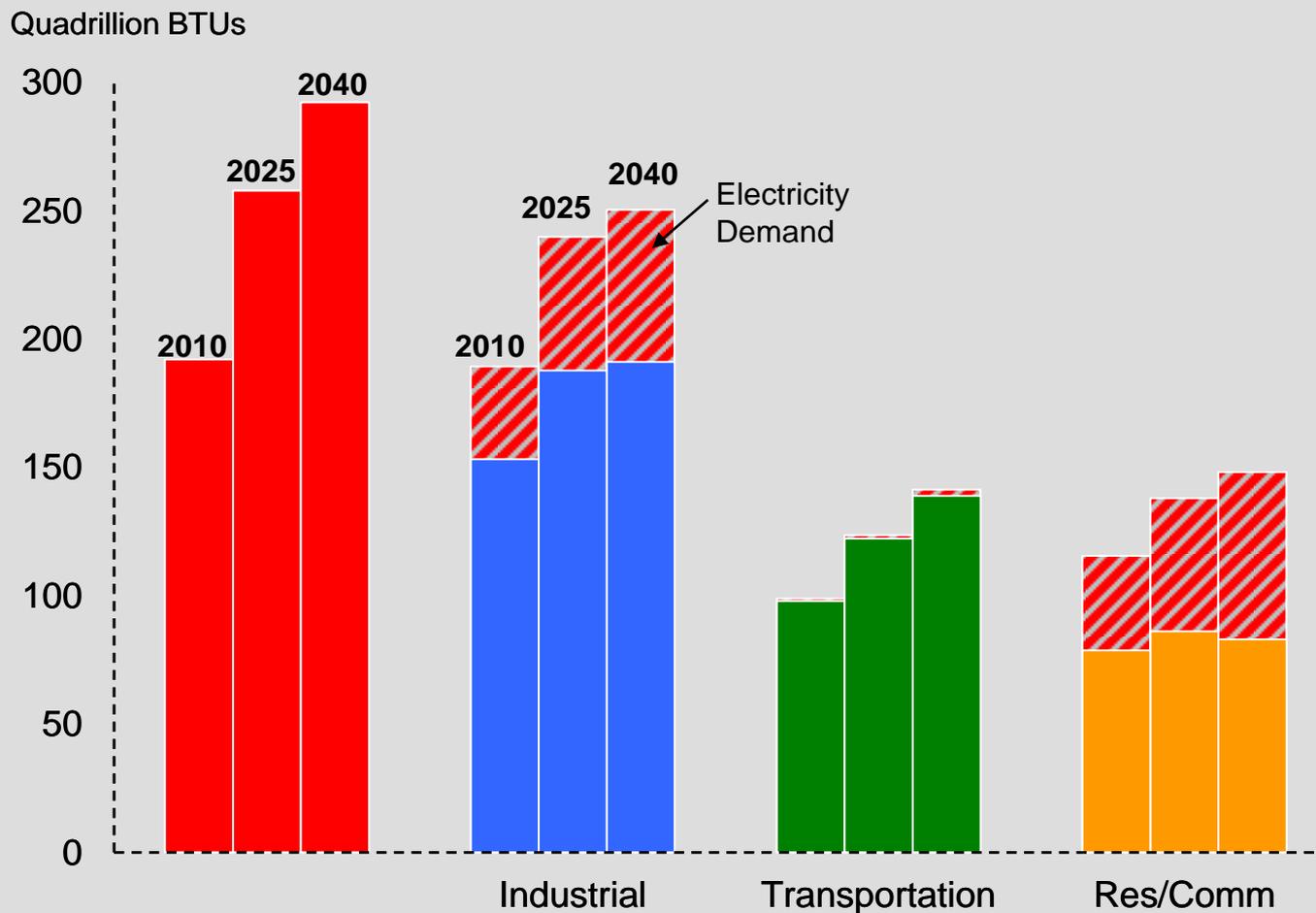


Non OECD Demand

Quadrillion BTUs



Demand by Sector



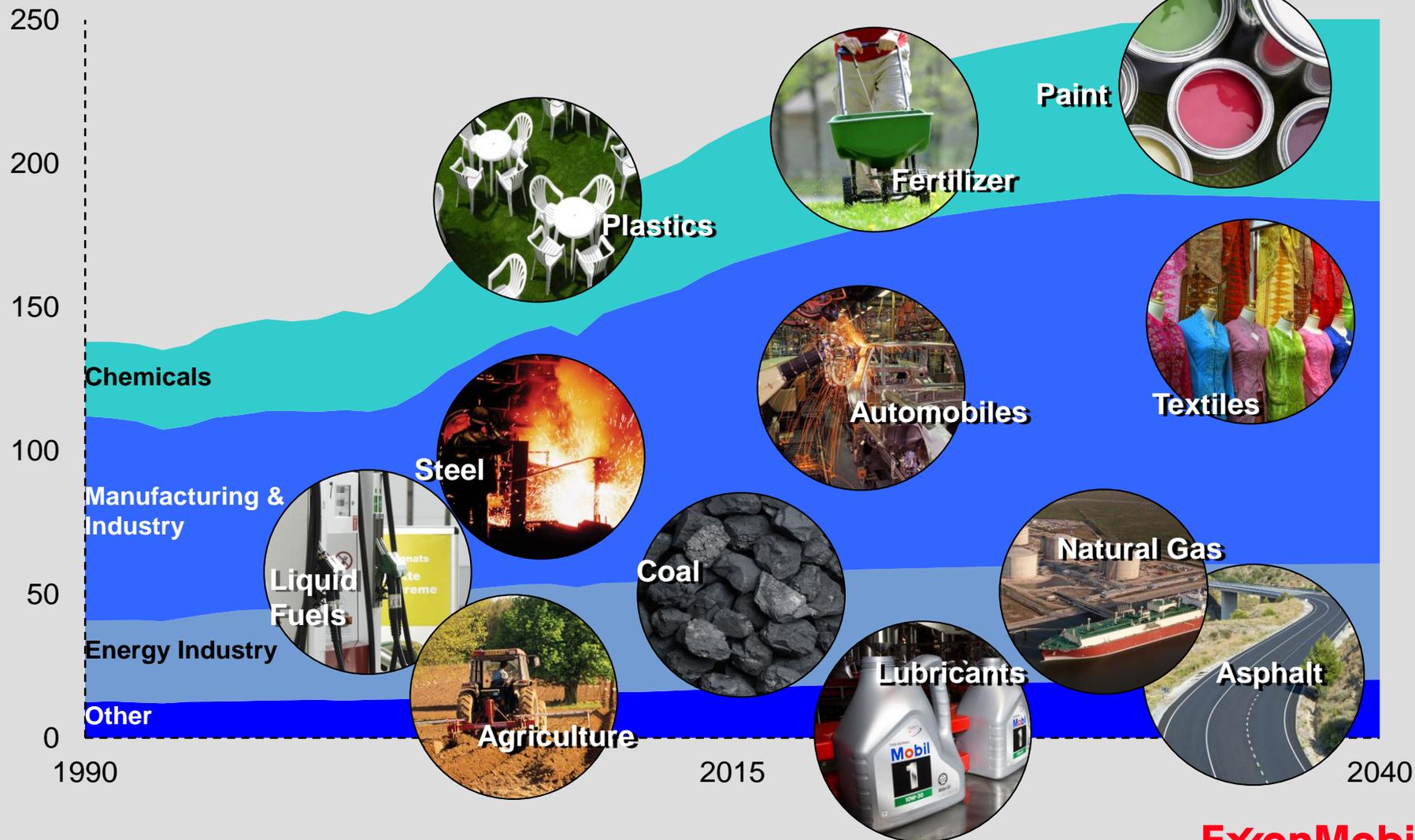
Industrial



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Industrial Energy Demand

Quadrillion BTUs

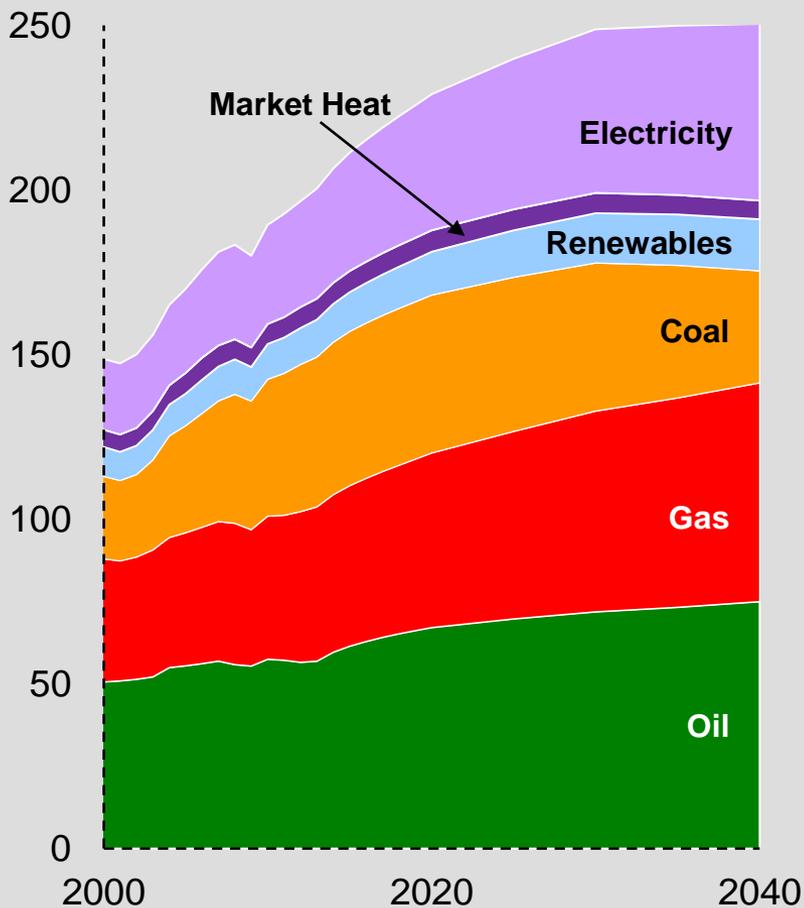


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Industrial Energy Demand

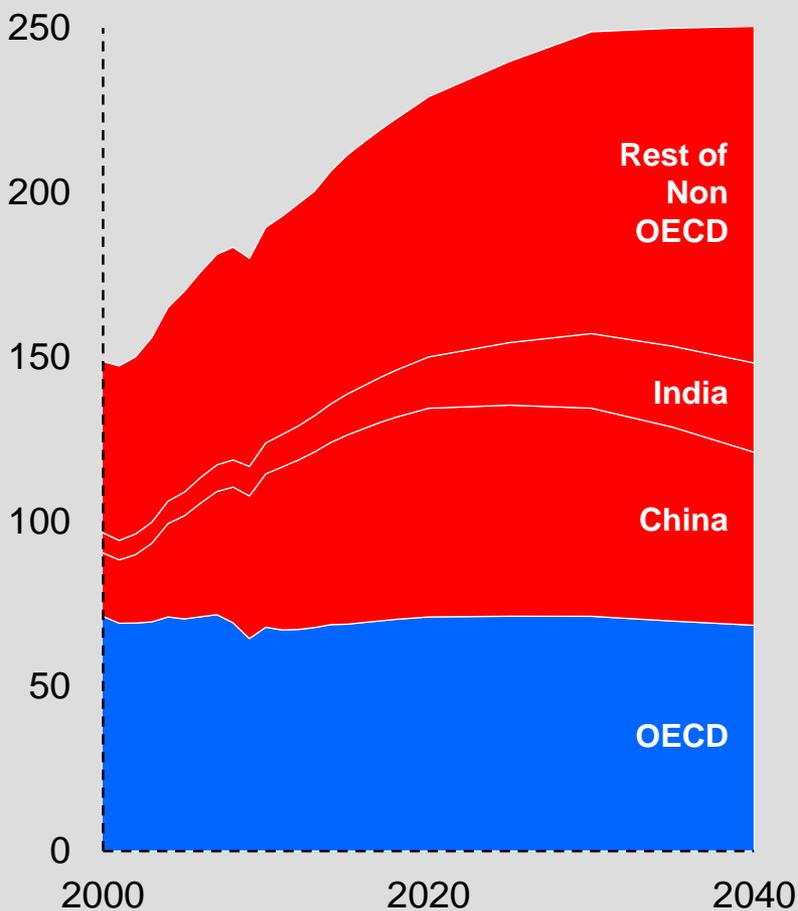
By Fuel

Quadrillion BTUs



By Region

Quadrillion BTUs



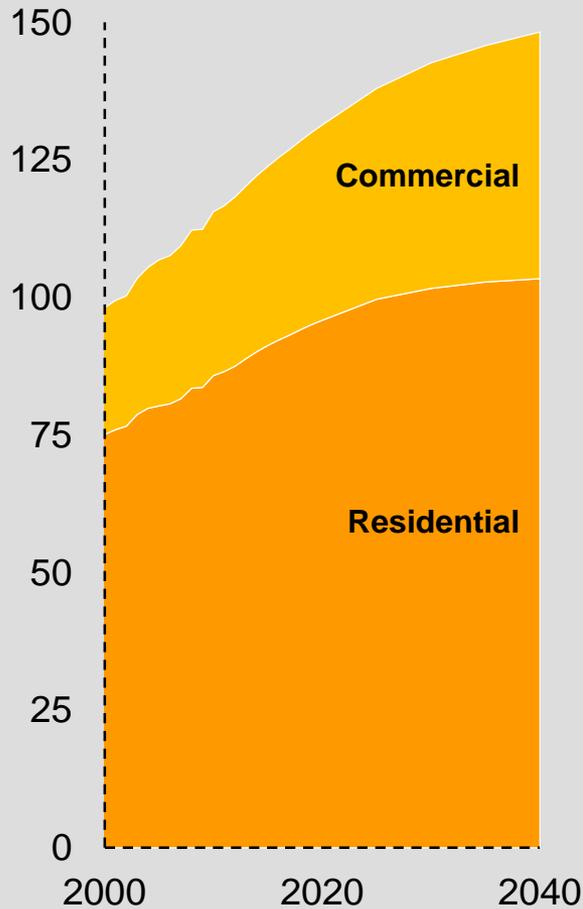
Residential / Commercial



Residential/Commercial Outlook

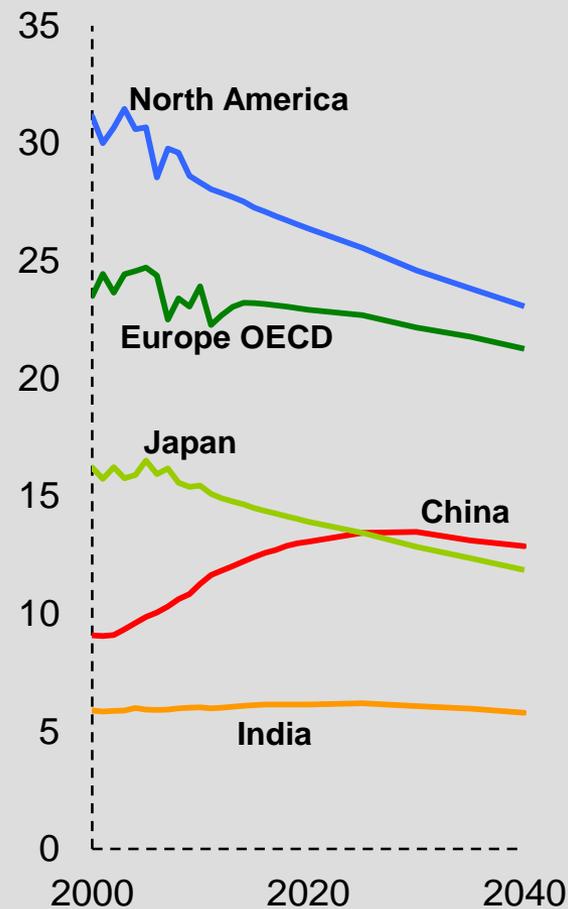
By Sector

Quadrillion BTUs



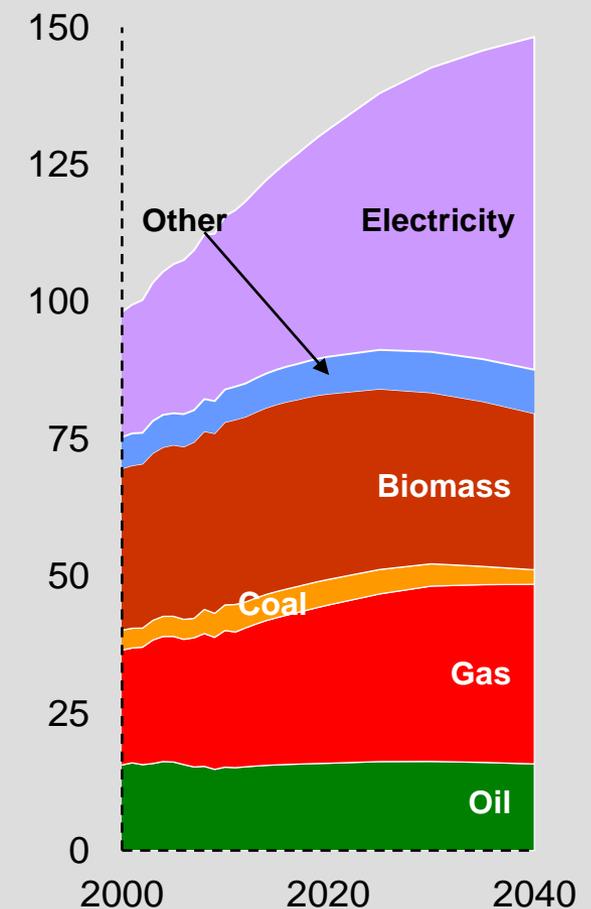
Residential Energy Intensity

Million BTUs per Person



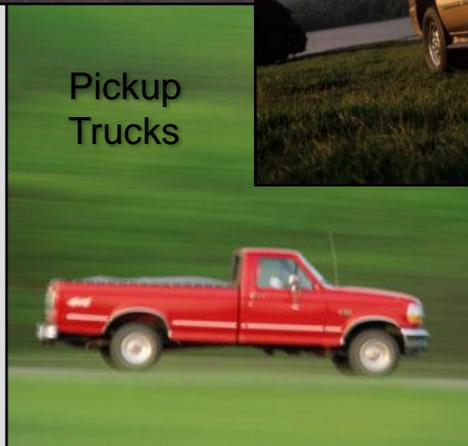
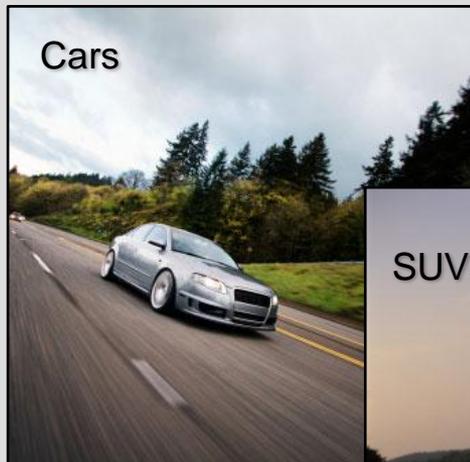
Fuel Demand

Quadrillion BTUs



Transportation Sectors

Light Duty Vehicles

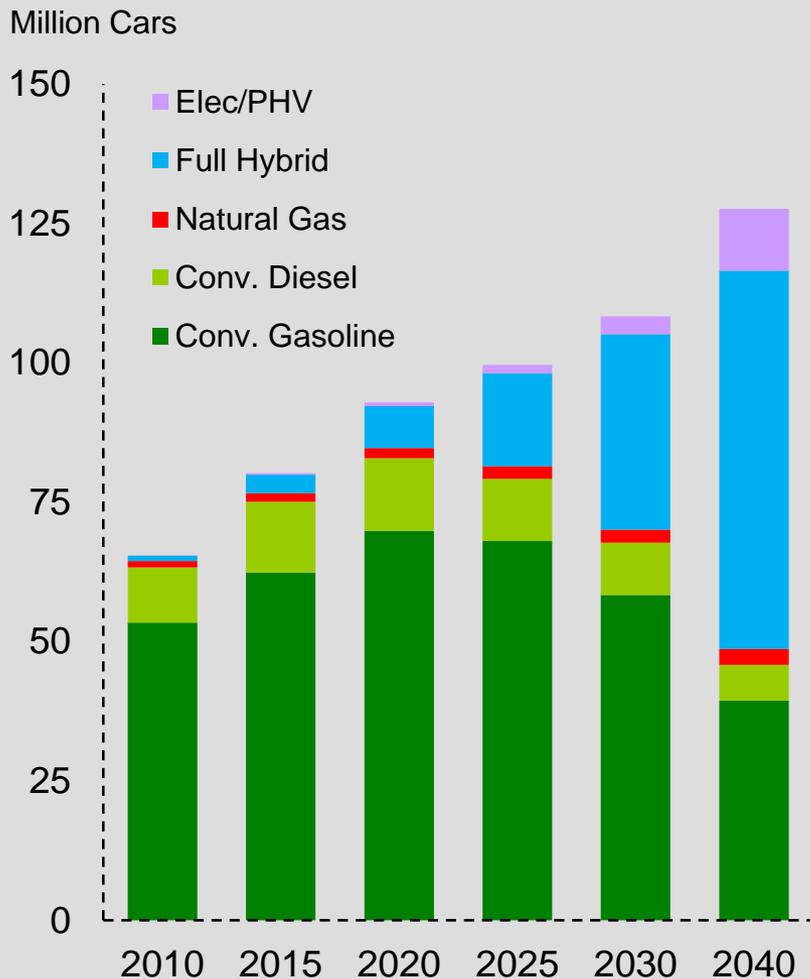


Heavy Duty Vehicles

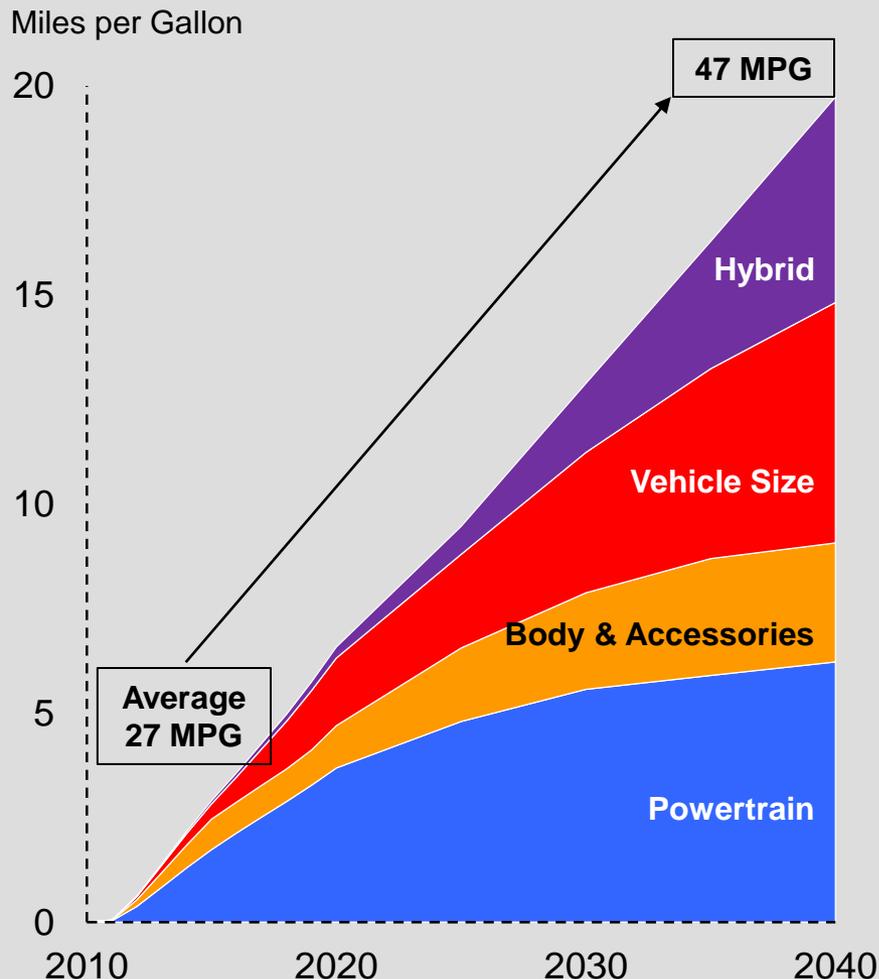


Light Duty Vehicle Sales & Efficiency

Annual New Car Sales by Type



Incremental Vehicle Efficiency Gains

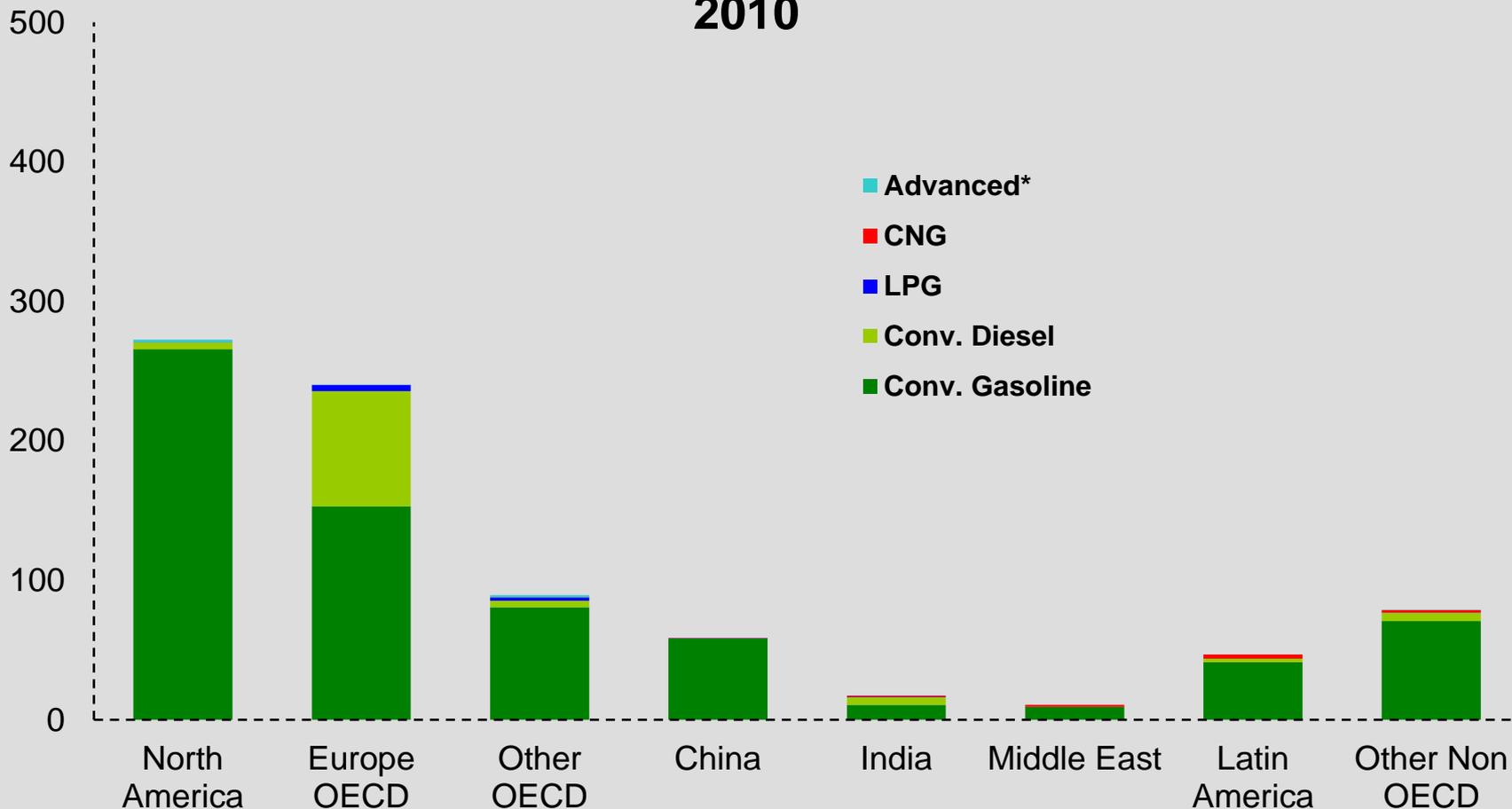


Light Duty Vehicle Fleet Grows, Mix Changes

Powertrain Technology

Millions of Vehicles

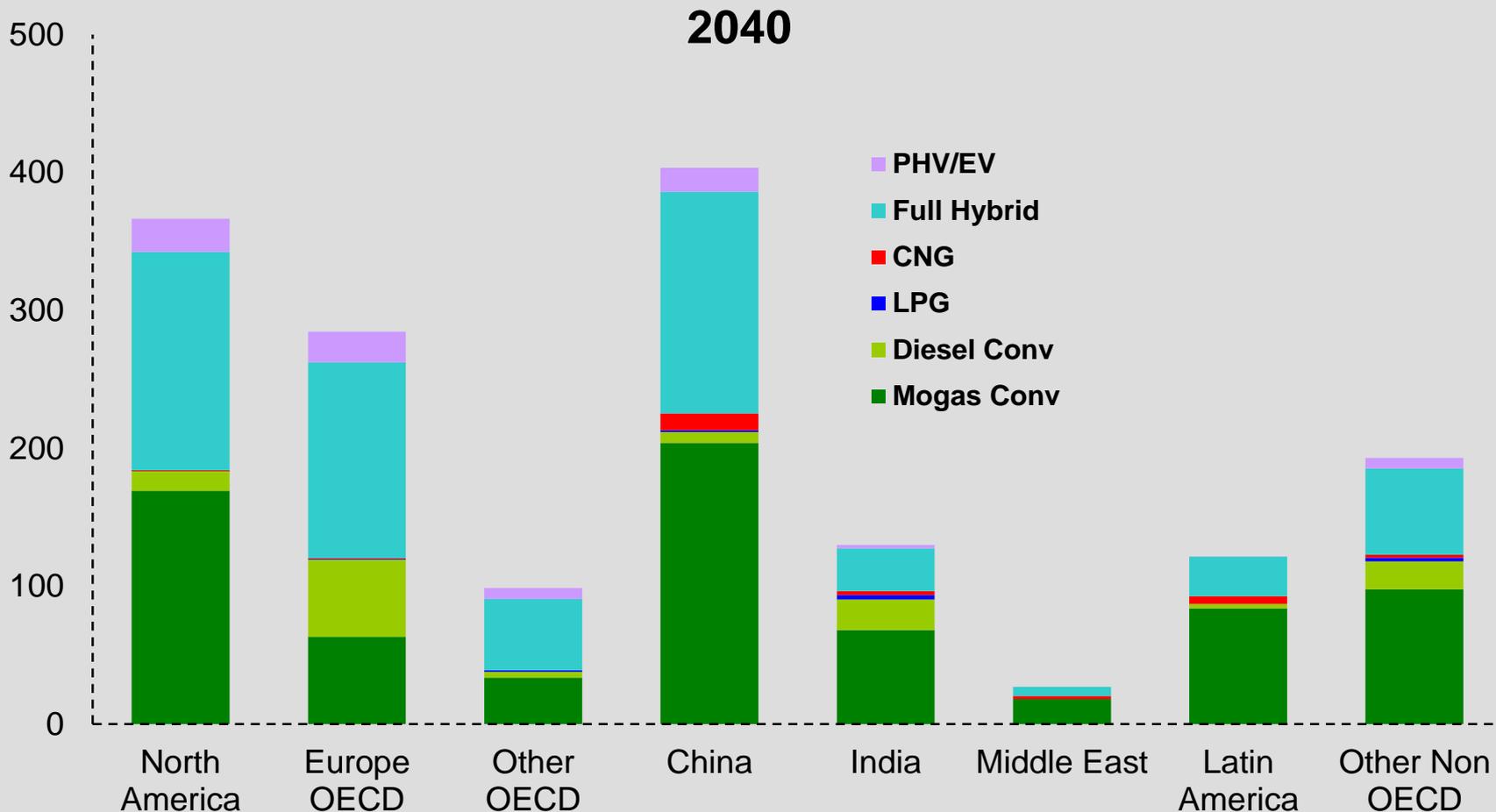
2010



Light Duty Vehicle Fleet Grows, Mix Changes

Powertrain Technology

Millions of Vehicles

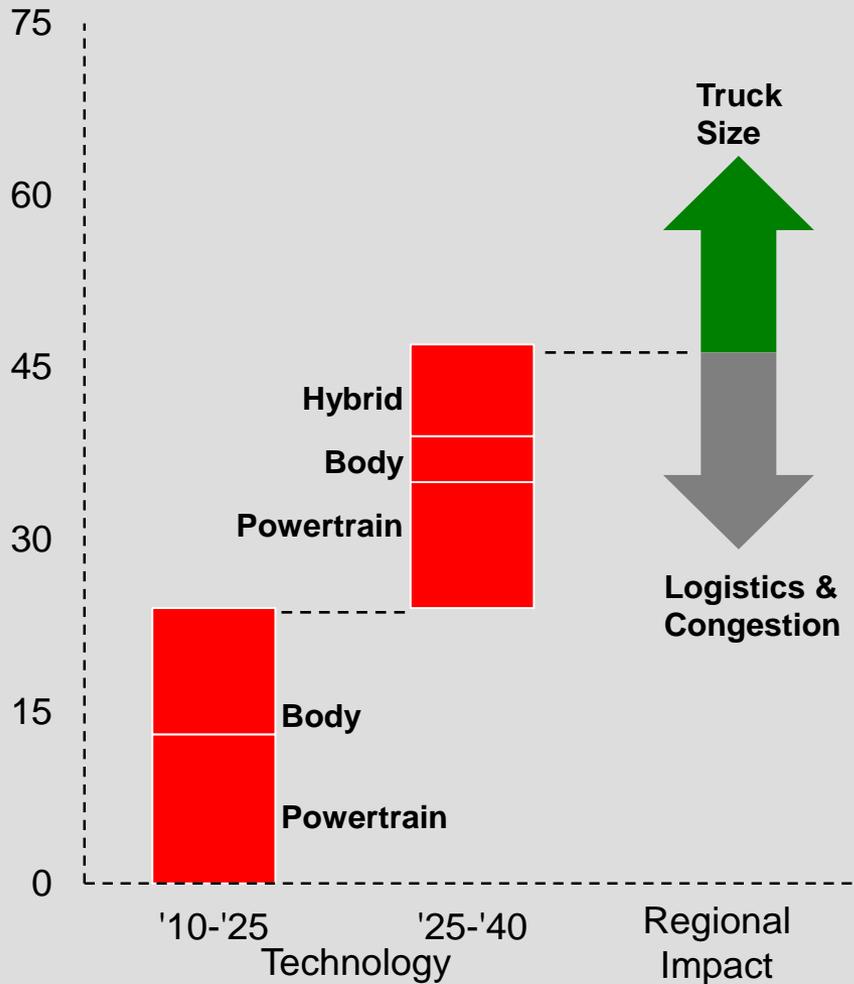


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Heavy Duty Transportation Efficiency

New Truck Efficiency

% Improvement, 2010-2040



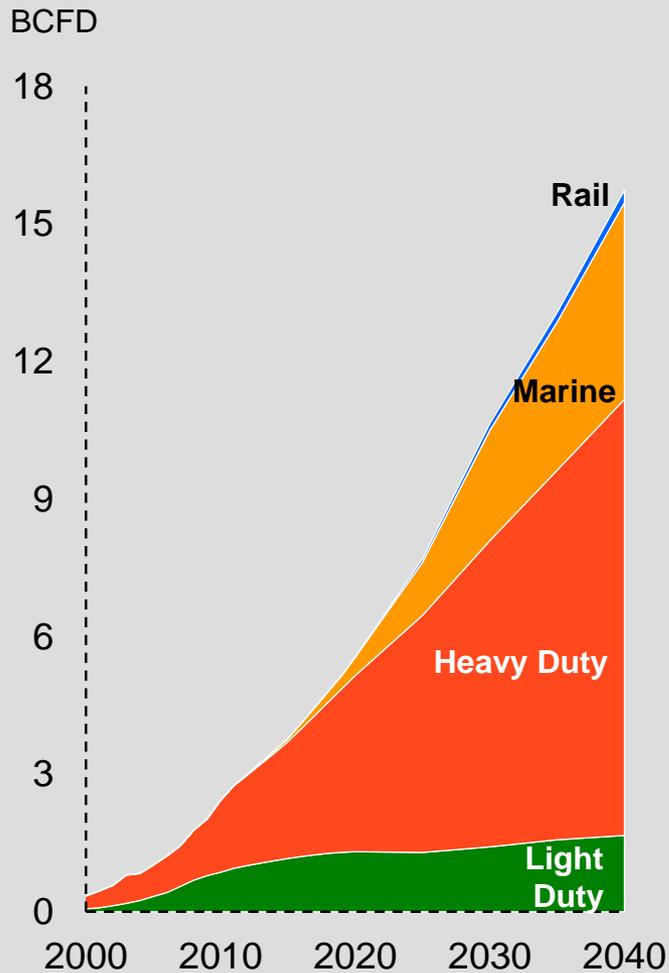
Efficiency Impact

MBDOE

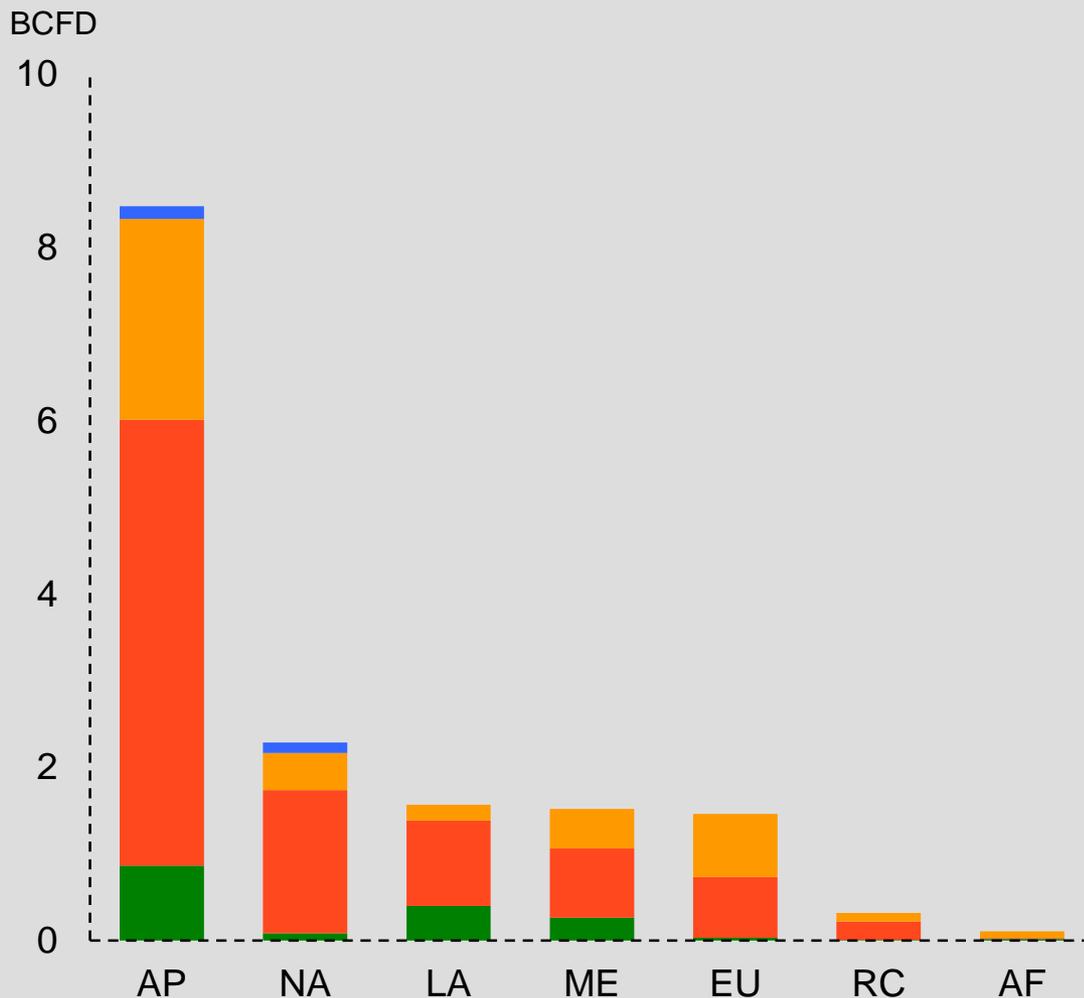


Gas Into Transportation

By Sector

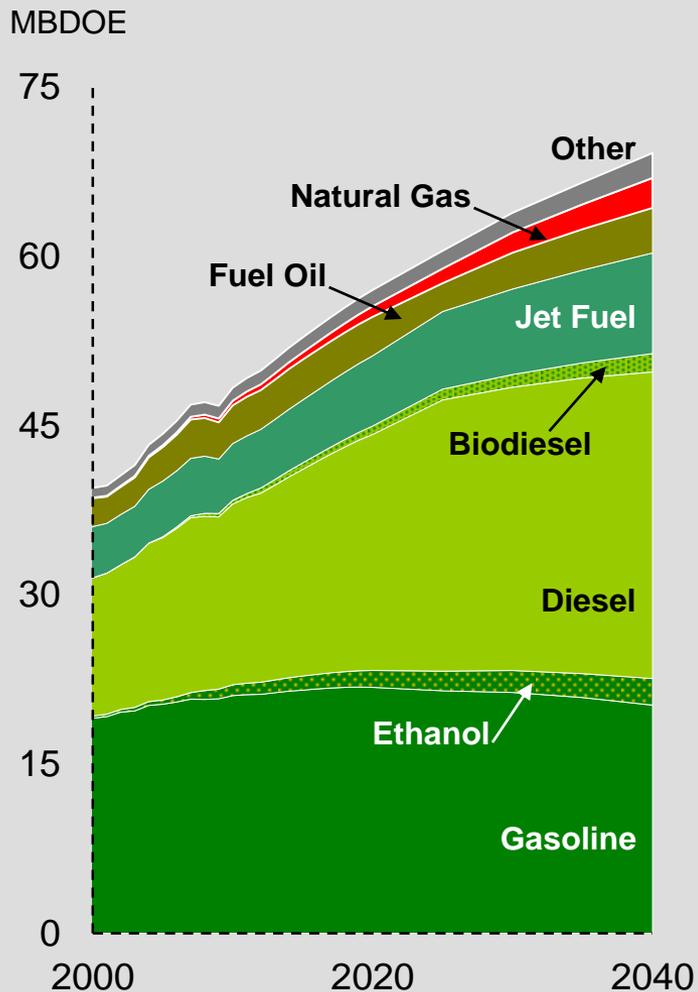


2040 by Region

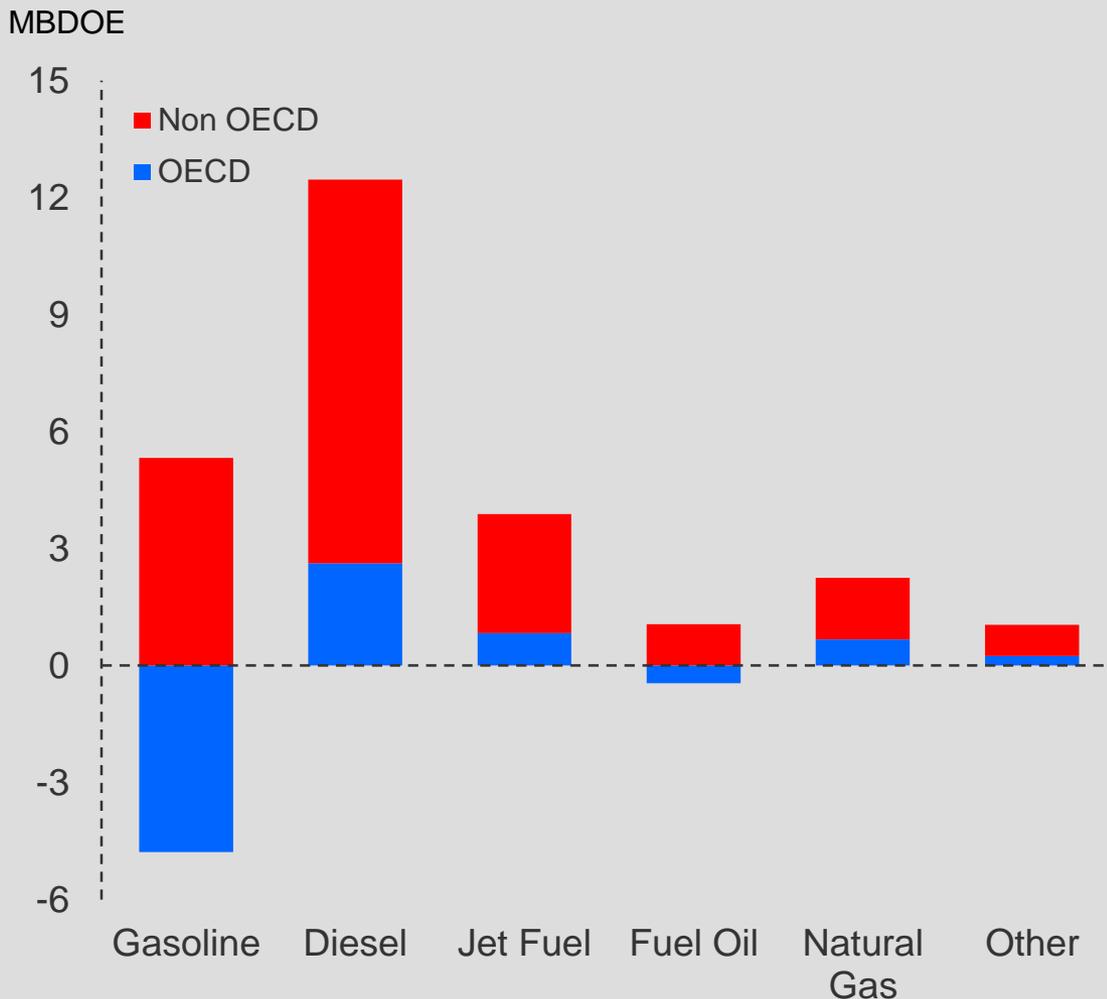


Transportation Fuel Mix

Fuel Demand



Growth in Demand from 2010 to 2040





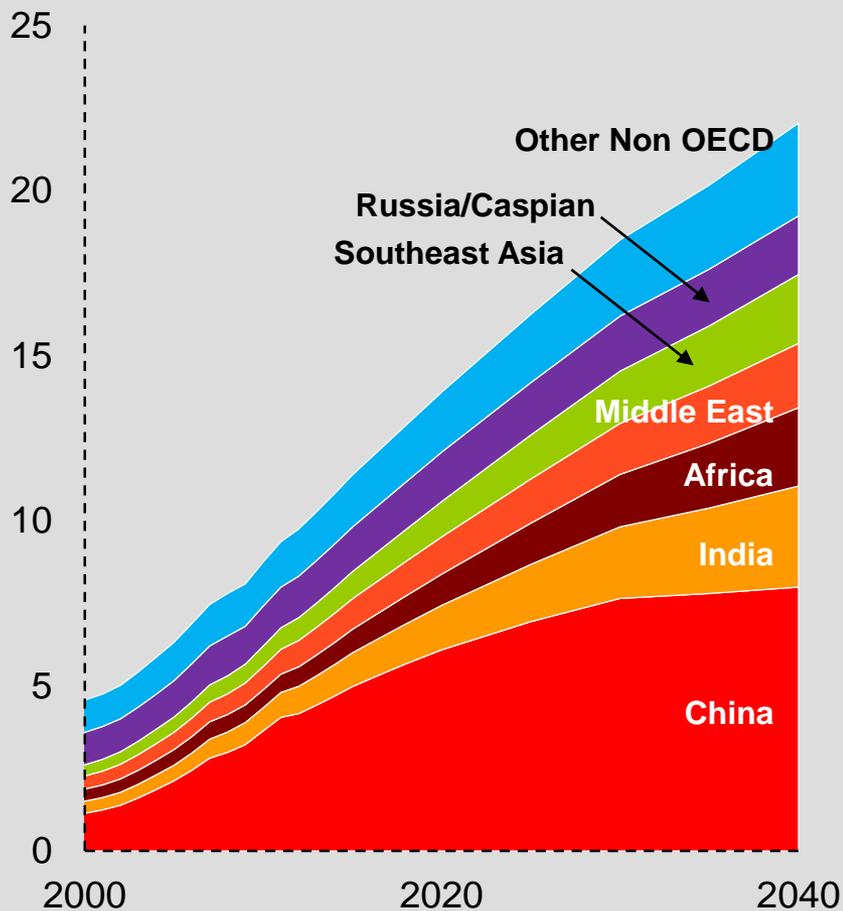
Electricity Generation

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Electricity Demand by Region

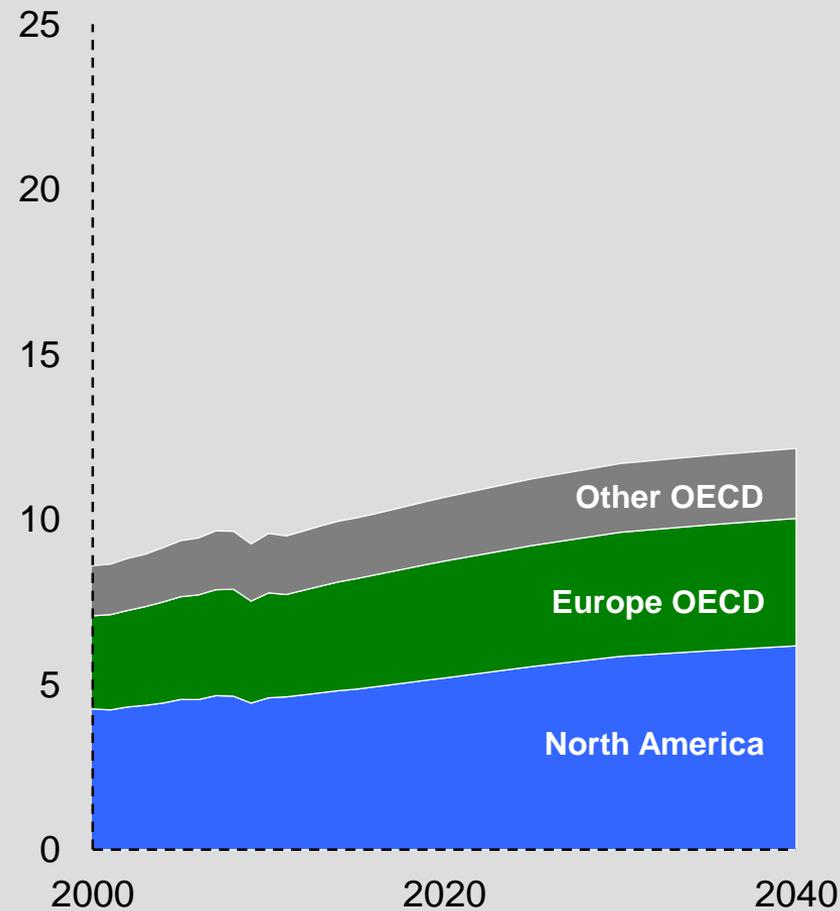
Non OECD

Thousand TWh



OECD

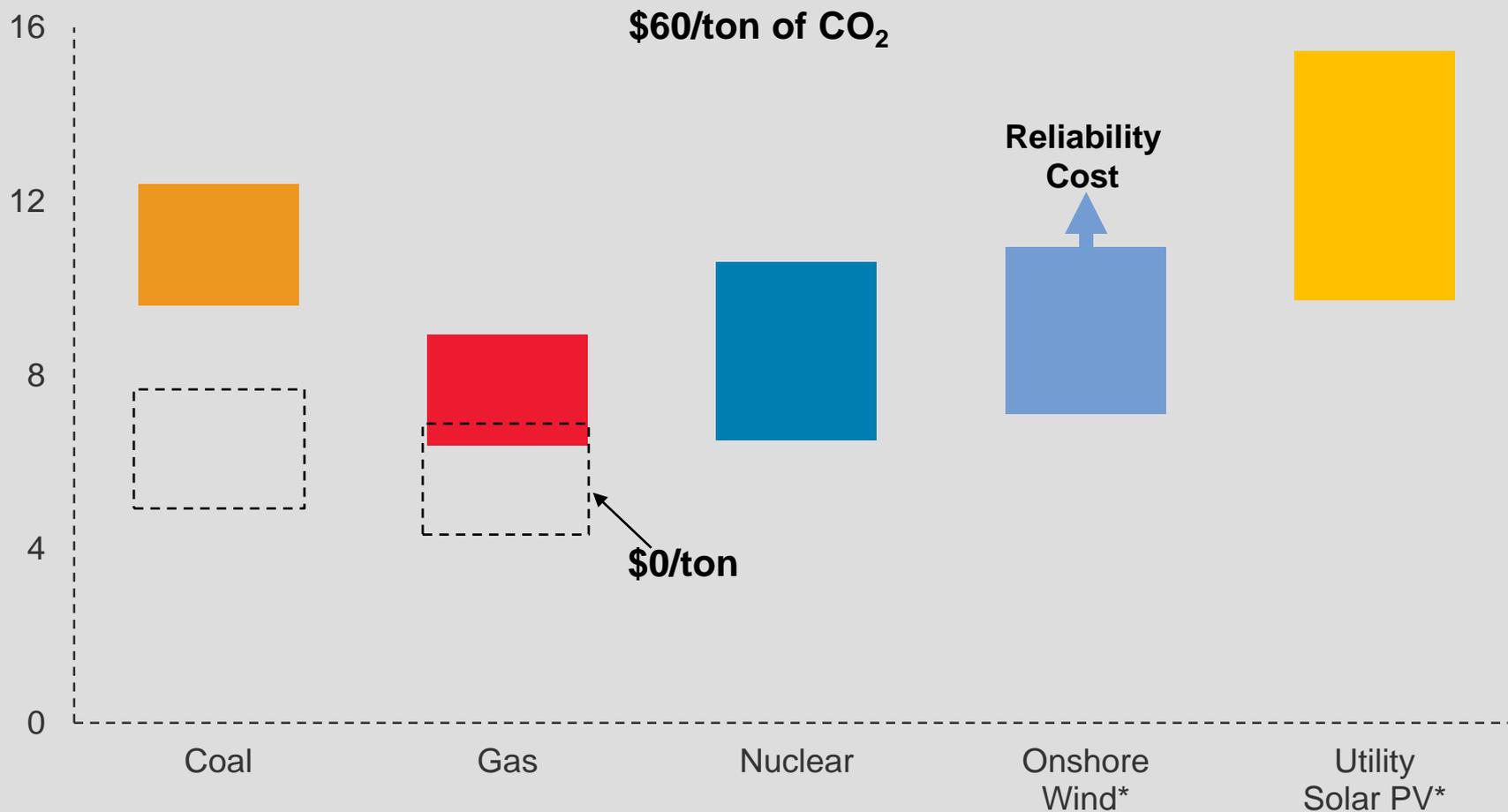
Thousand TWh



Choices for U.S. Electricity

Baseload, Startup 2030

2012 cents/kWh

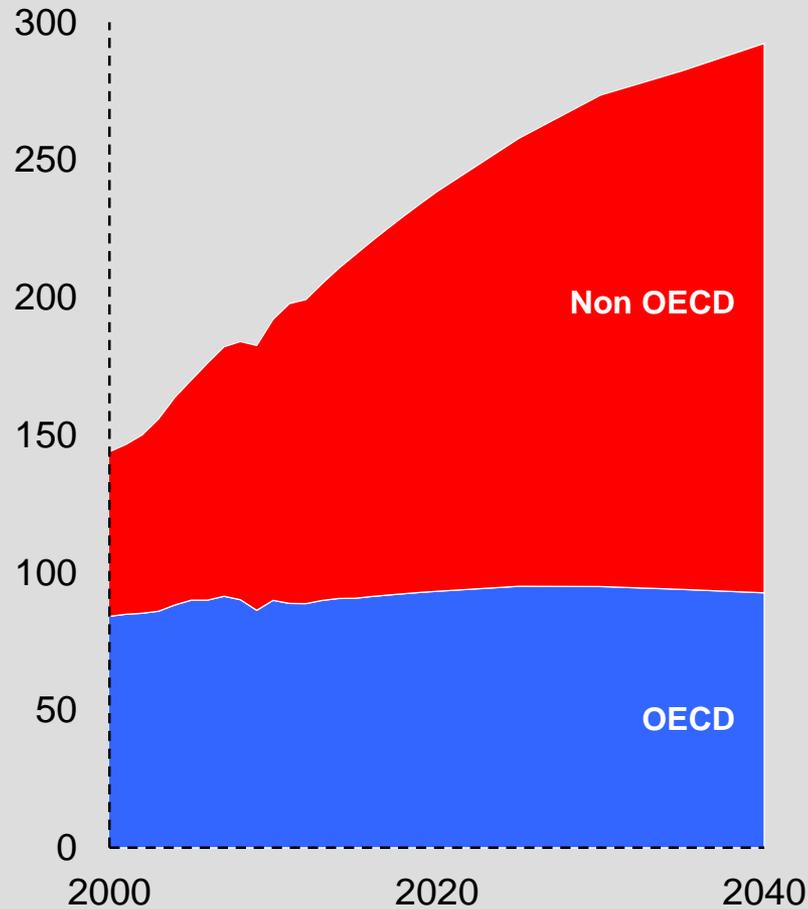


*Wind and solar exclude costs for integration, backup capacity and additional transmission

Electricity Generation by Region

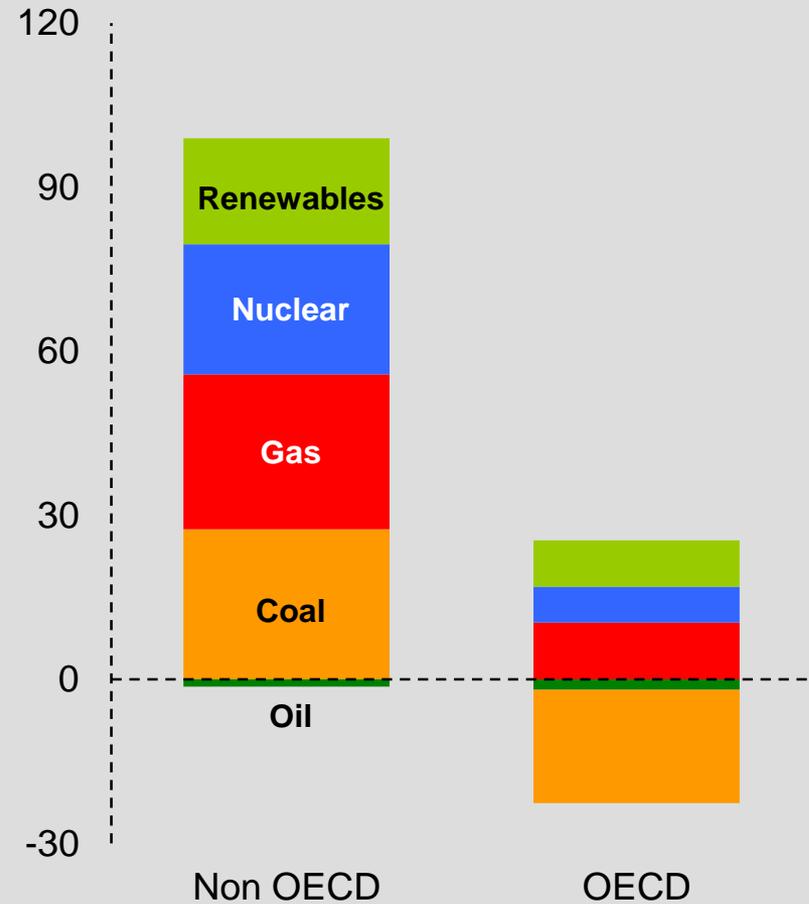
Electricity Generation

Quadrillion BTUs



Growth in Fuels from 2010 to 2040

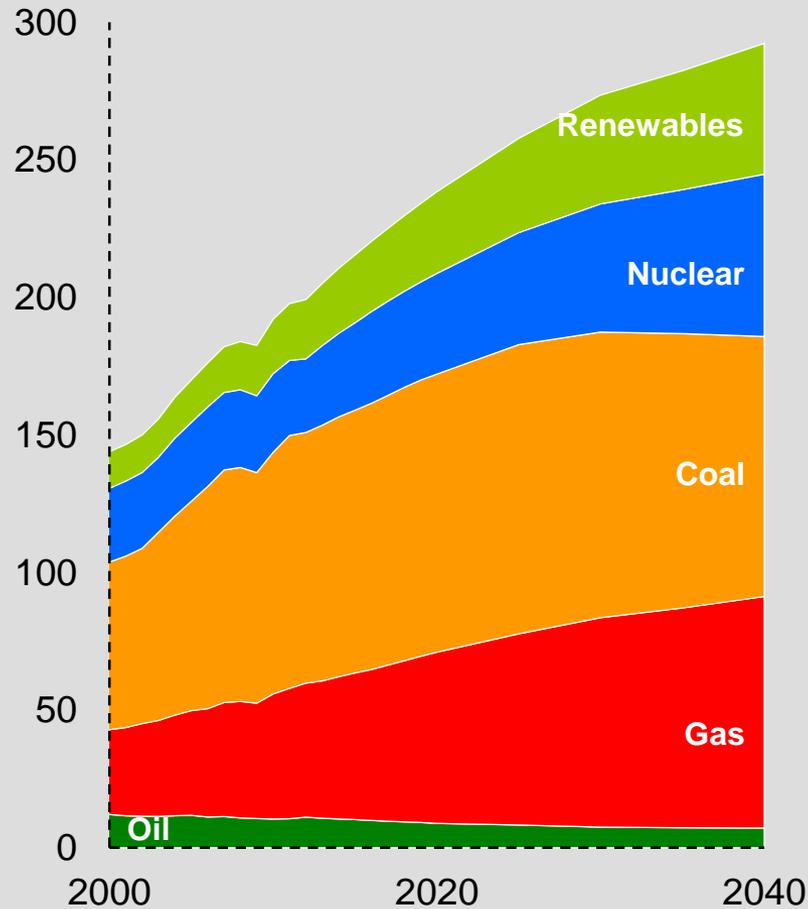
Quadrillion BTUs



Electricity Generation by Region

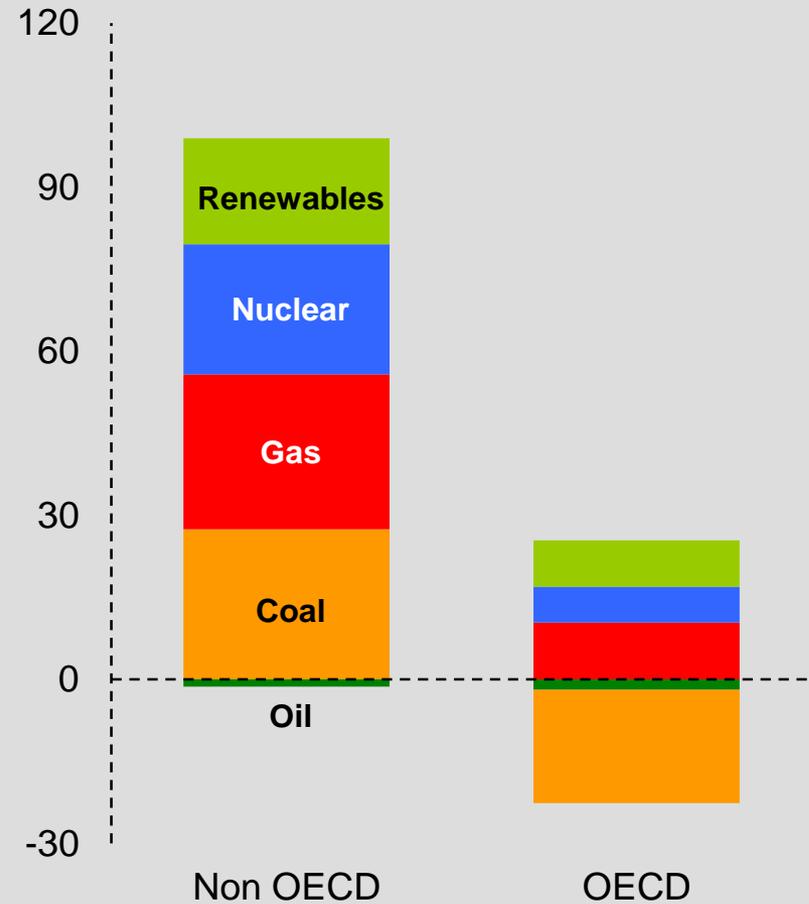
Electricity Generation

Quadrillion BTUs



Growth in Fuels from 2010 to 2040

Quadrillion BTUs



Supply

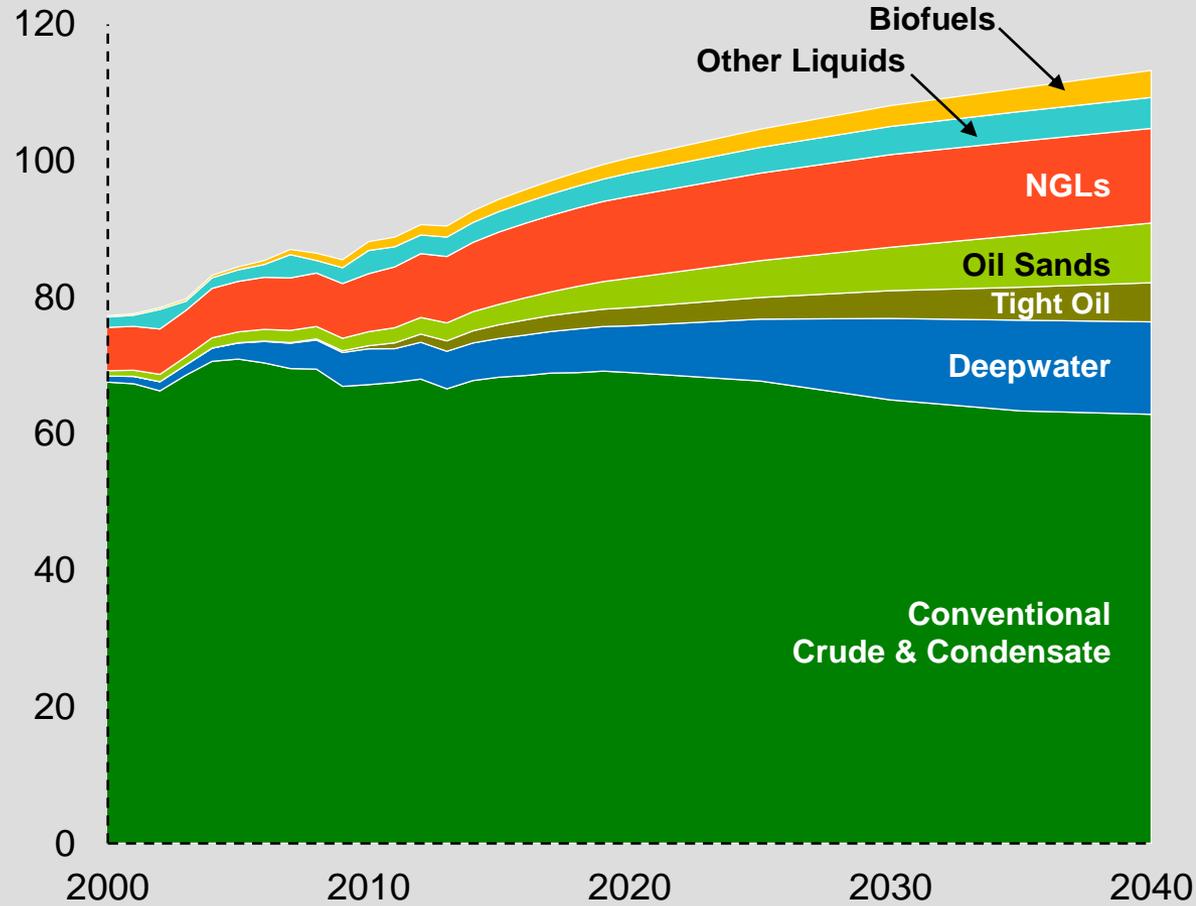


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Liquids Supply

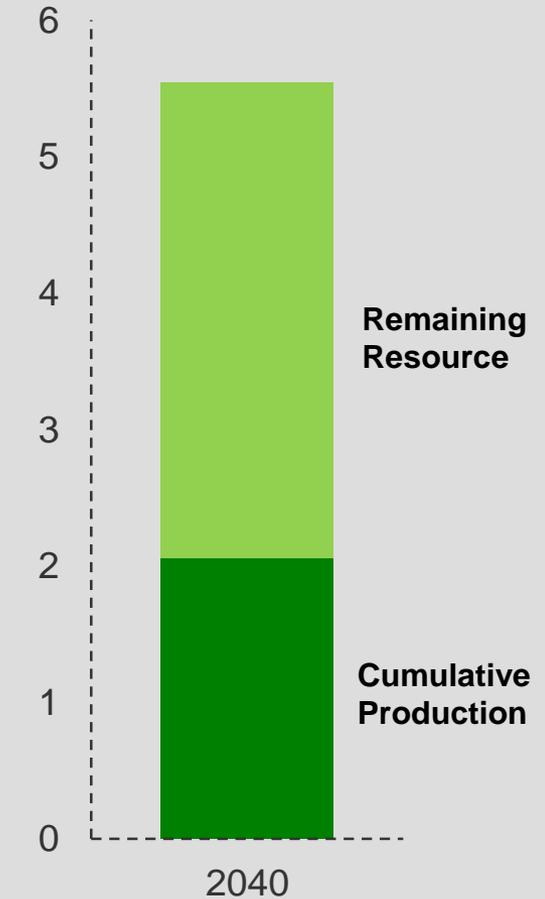
Supply by Type

MBDOE

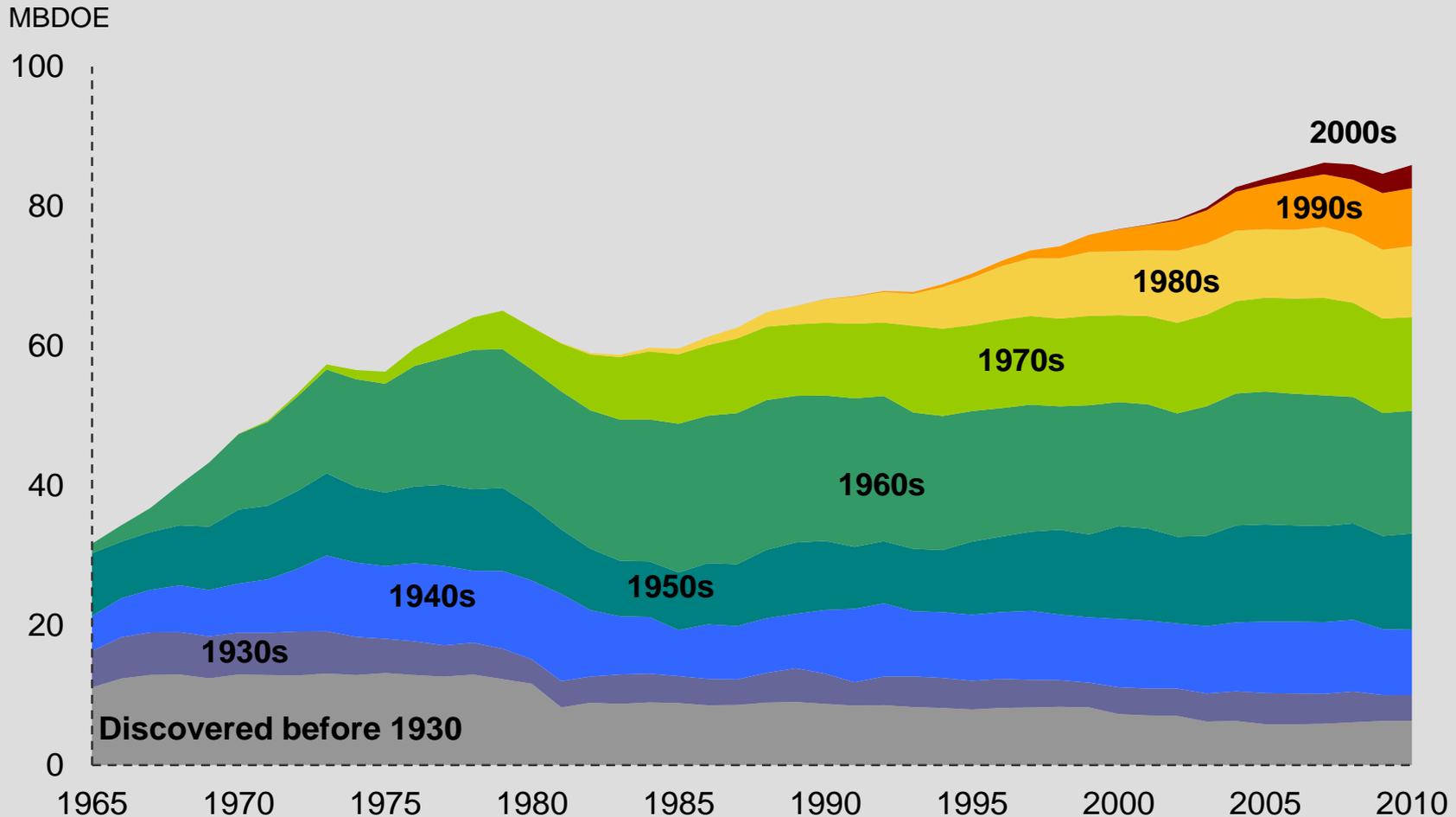


Resource*

TBO

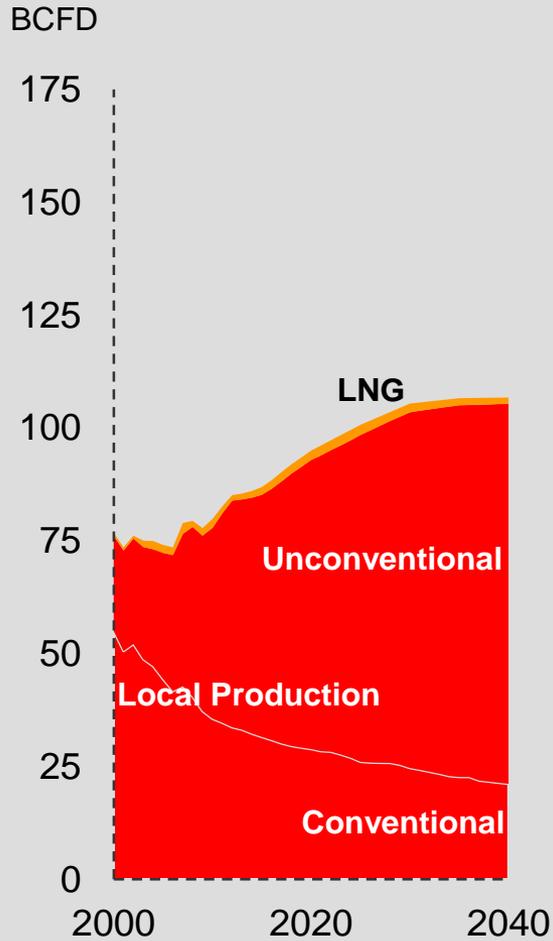


Global Oil Production by Discovery Date

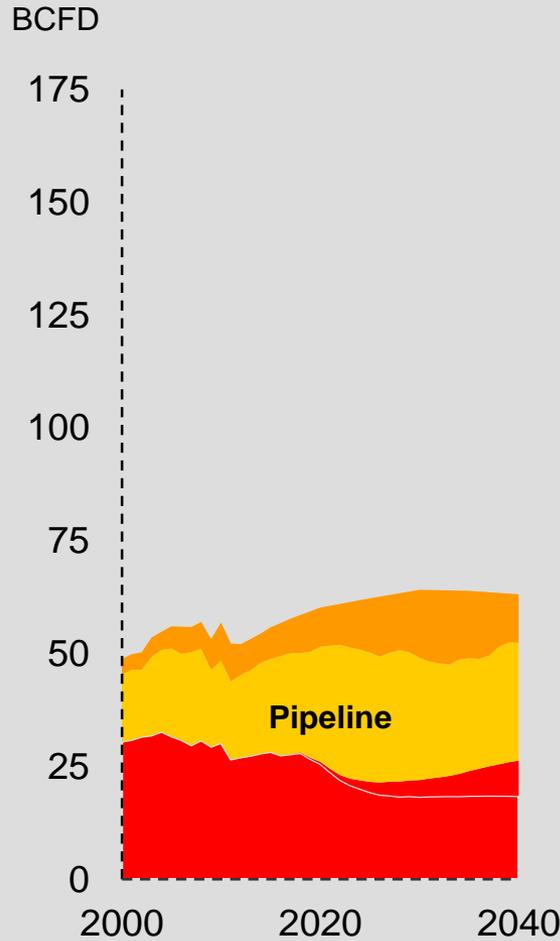


Natural Gas Supply

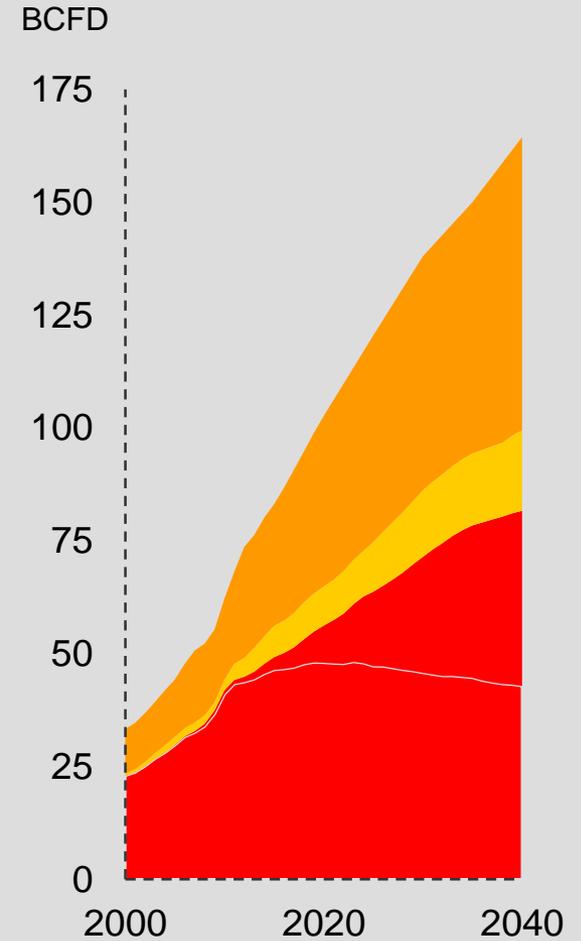
North America



Europe



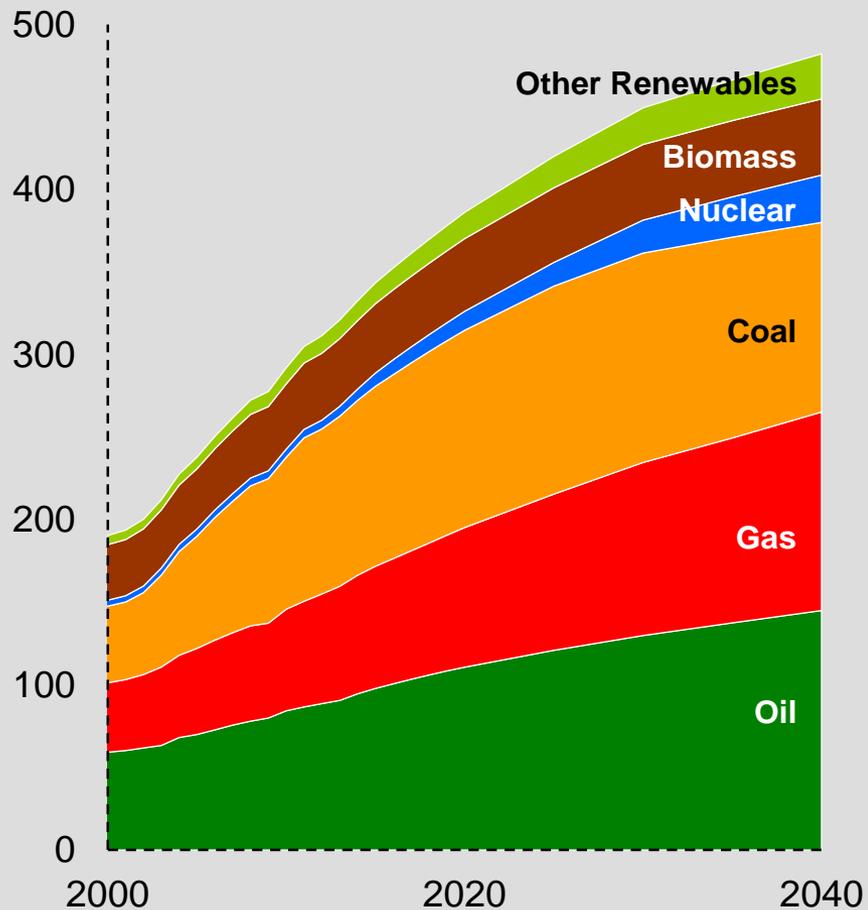
Asia Pacific



Total Energy Demand

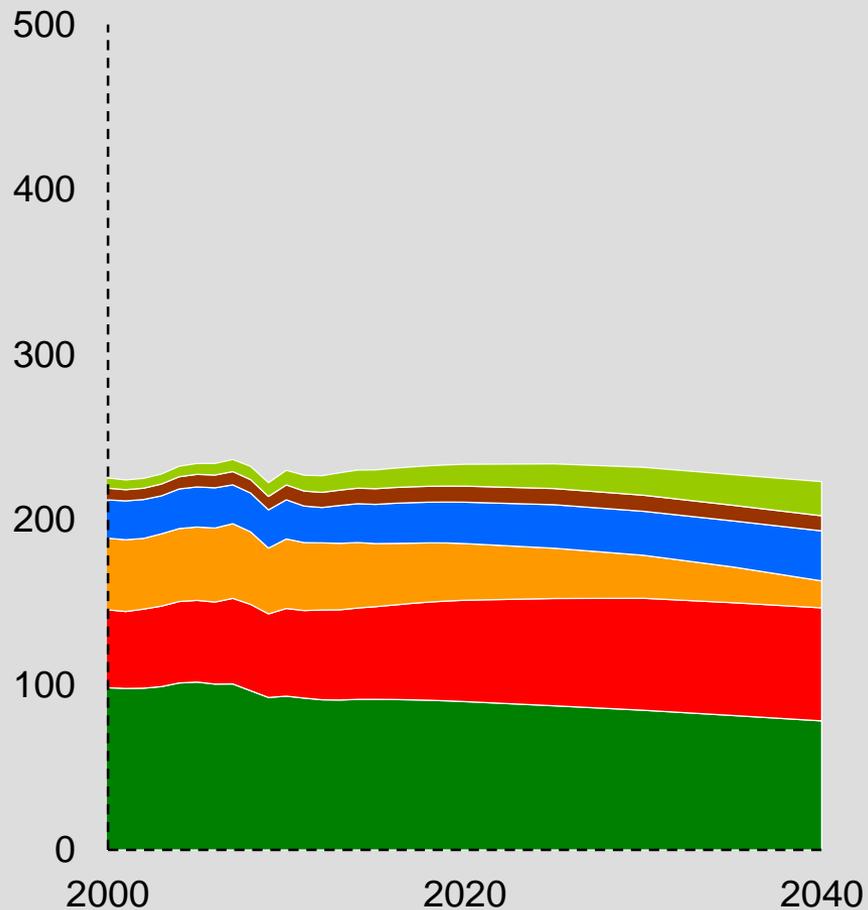
Non OECD

Quadrillion BTUs



OECD

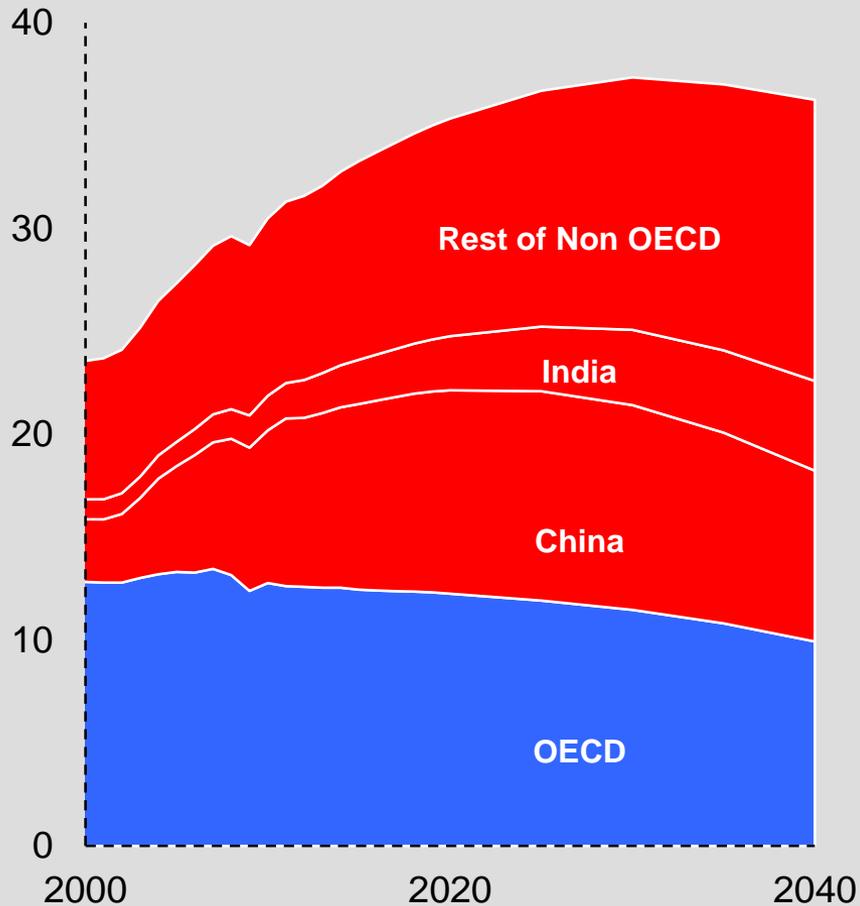
Quadrillion BTUs



CO₂ Emissions

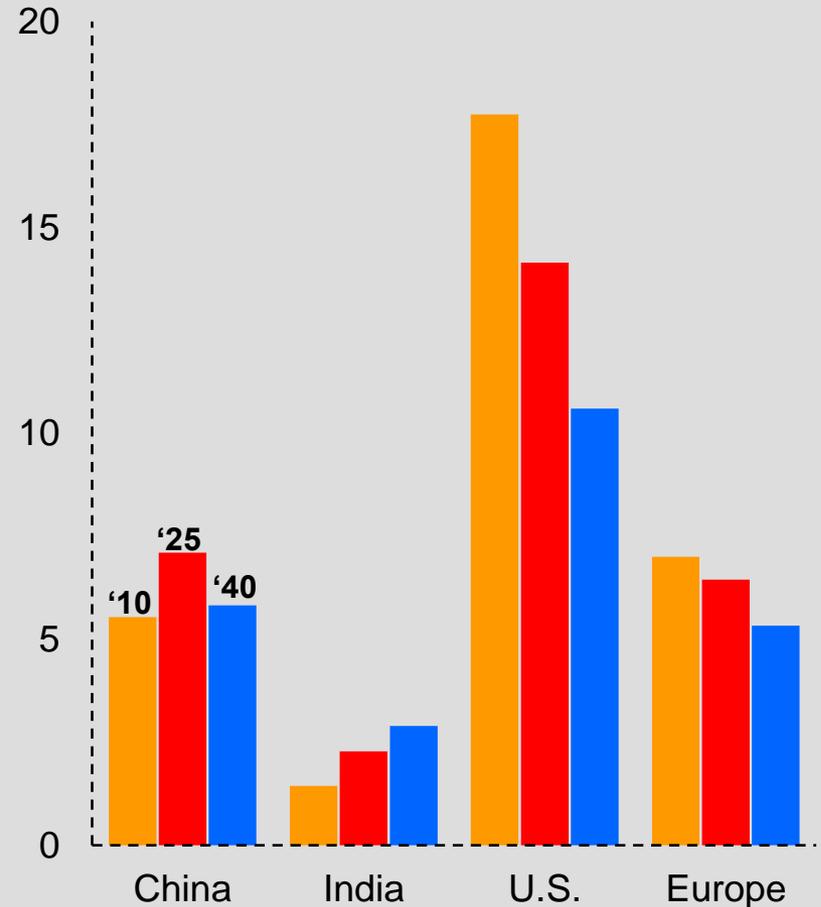
By Region

Billion Tons



Emissions per Capita

Tons per Person



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Development Challenges and Solutions

World development continues - lives improve and economies grow

~9 billion people

130% increase in global GDP

30% increase in energy demand

**500 quadrillion BTUs saved
through efficiencies**

***All reliable, affordable energy
supplies needed***



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