

A world map is shown in a dark blue, almost black, color. The map is illuminated with numerous bright blue light rays that radiate outwards from the center, creating a starburst effect. The rays are most concentrated over the North Atlantic and Europe, and become more sparse towards the poles and the southern regions of the map. The overall effect is one of global connectivity and energy.

The Outlook for Energy: A View to 2040

Tom Eizember, Corporate Strategic Planning

March 27, 2012

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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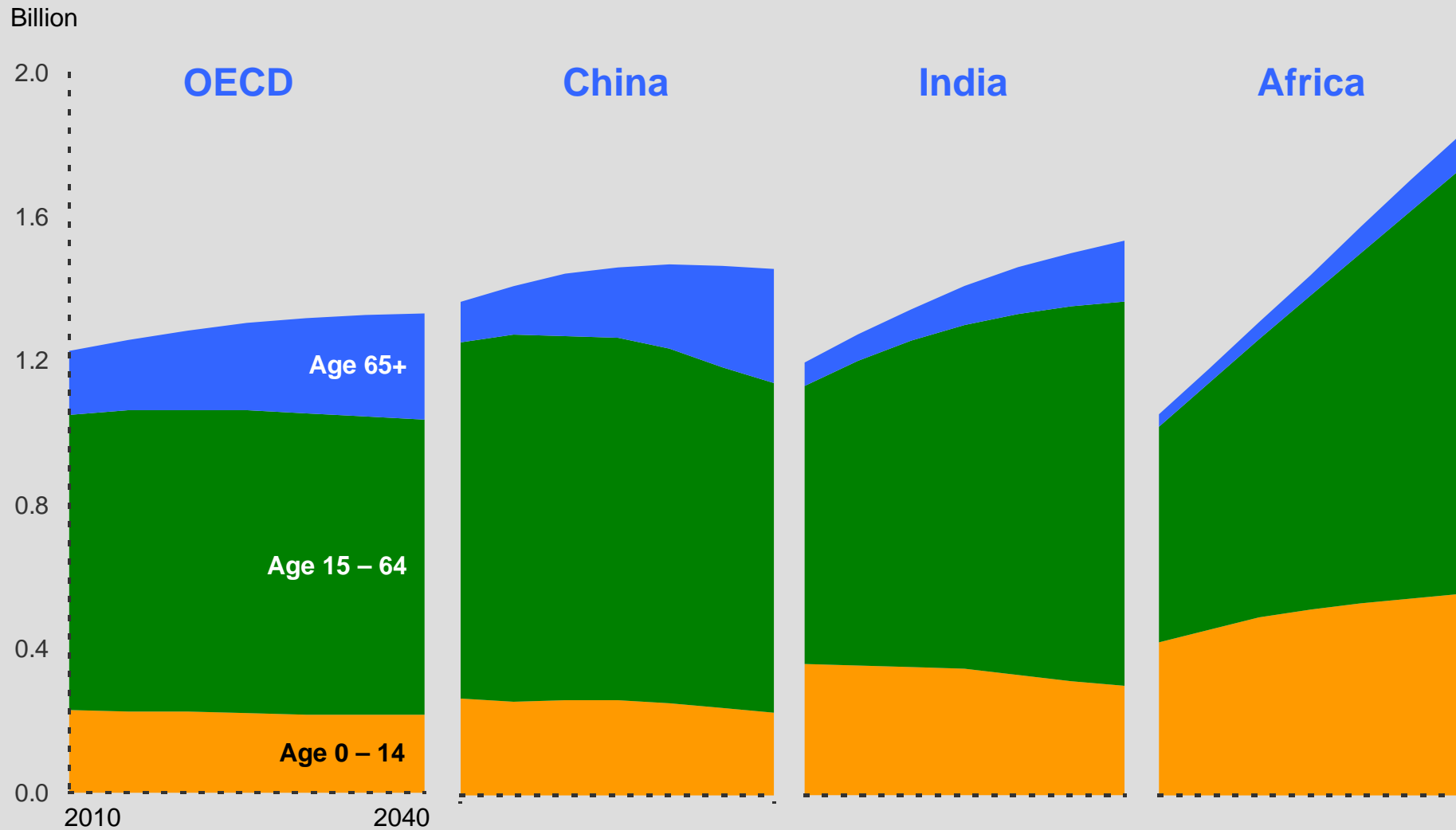
Economic and Energy Evolution

As societies and technologies develop over time...



... energy needs evolve

Demographics Drive Activity



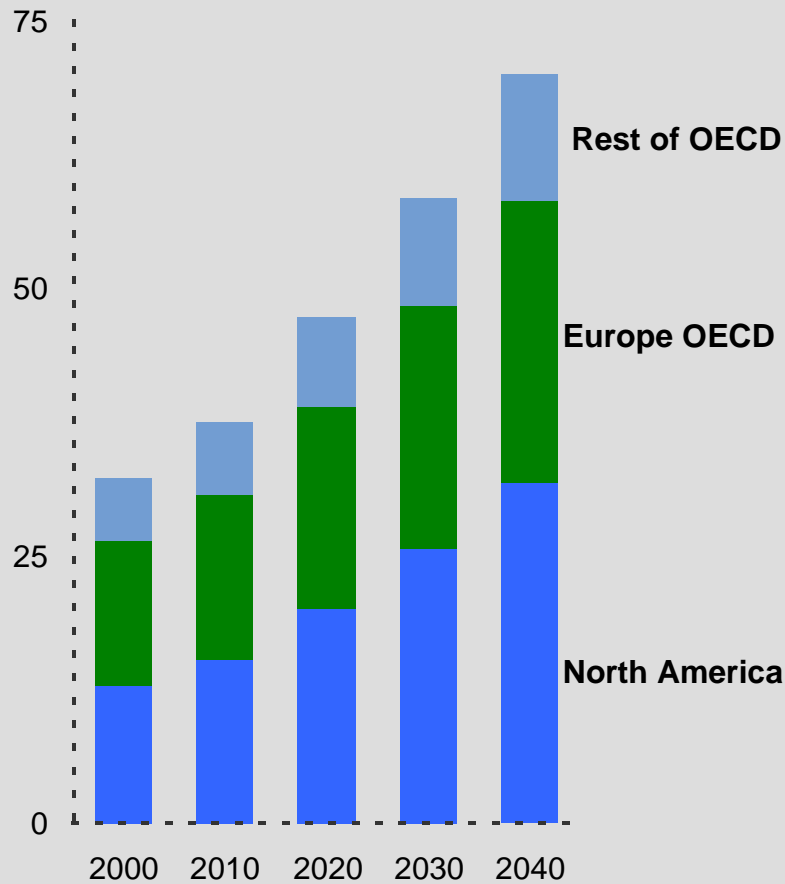
Source: World Bank
ExxonMobil 2012 Outlook for Energy

ExxonMobil

OECD Efficiency Moderates Energy Demand

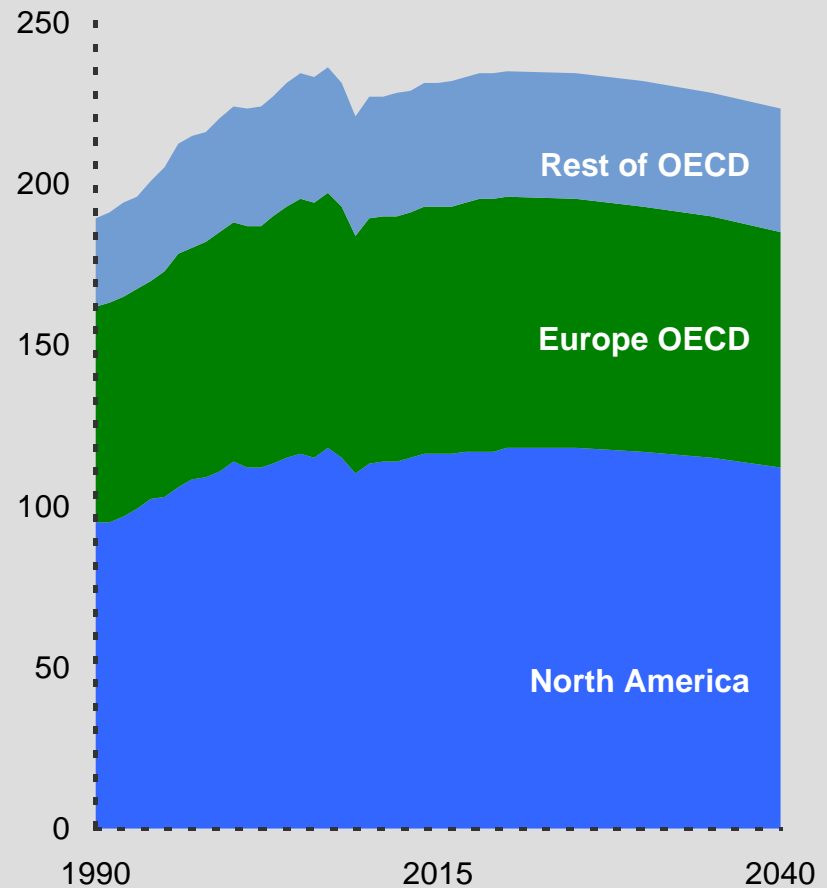
OECD GDP

Trillion 2005 \$



OECD Energy Demand

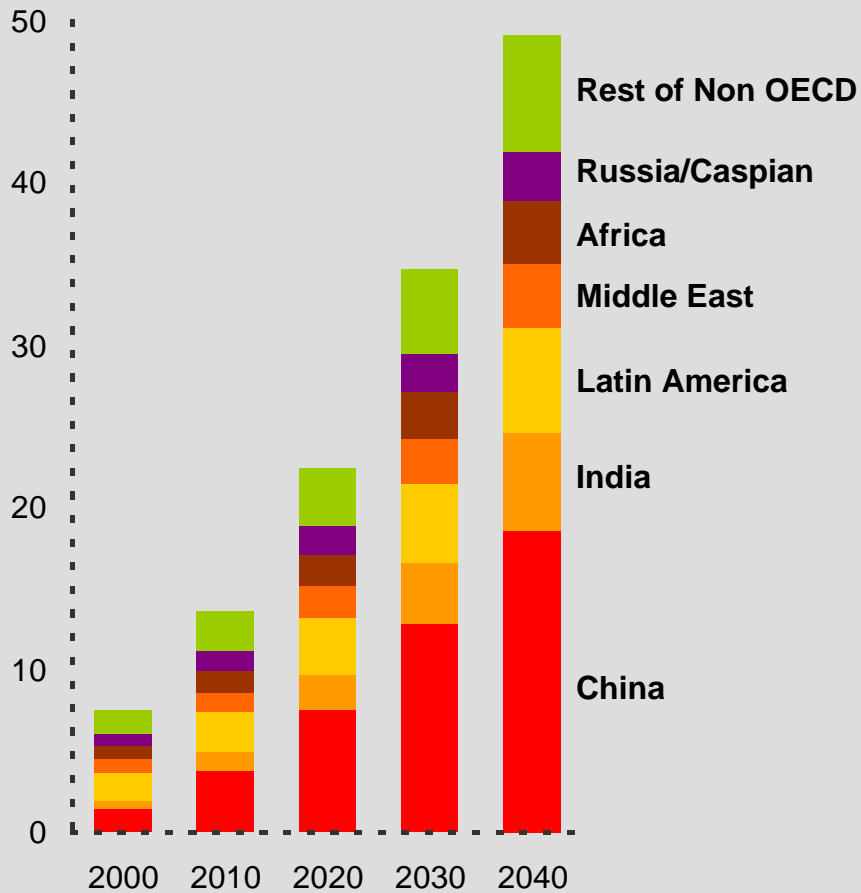
Quadrillion BTUs



Expanding Economies Drive Increasing Demand

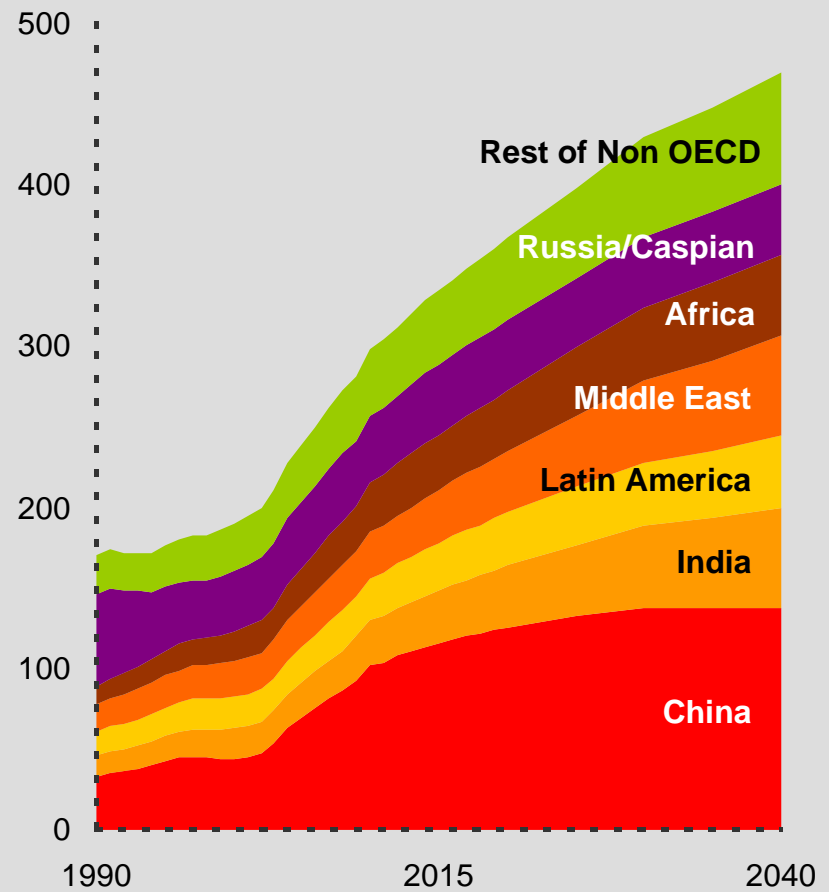
Non OECD GDP

Trillion 2005 \$

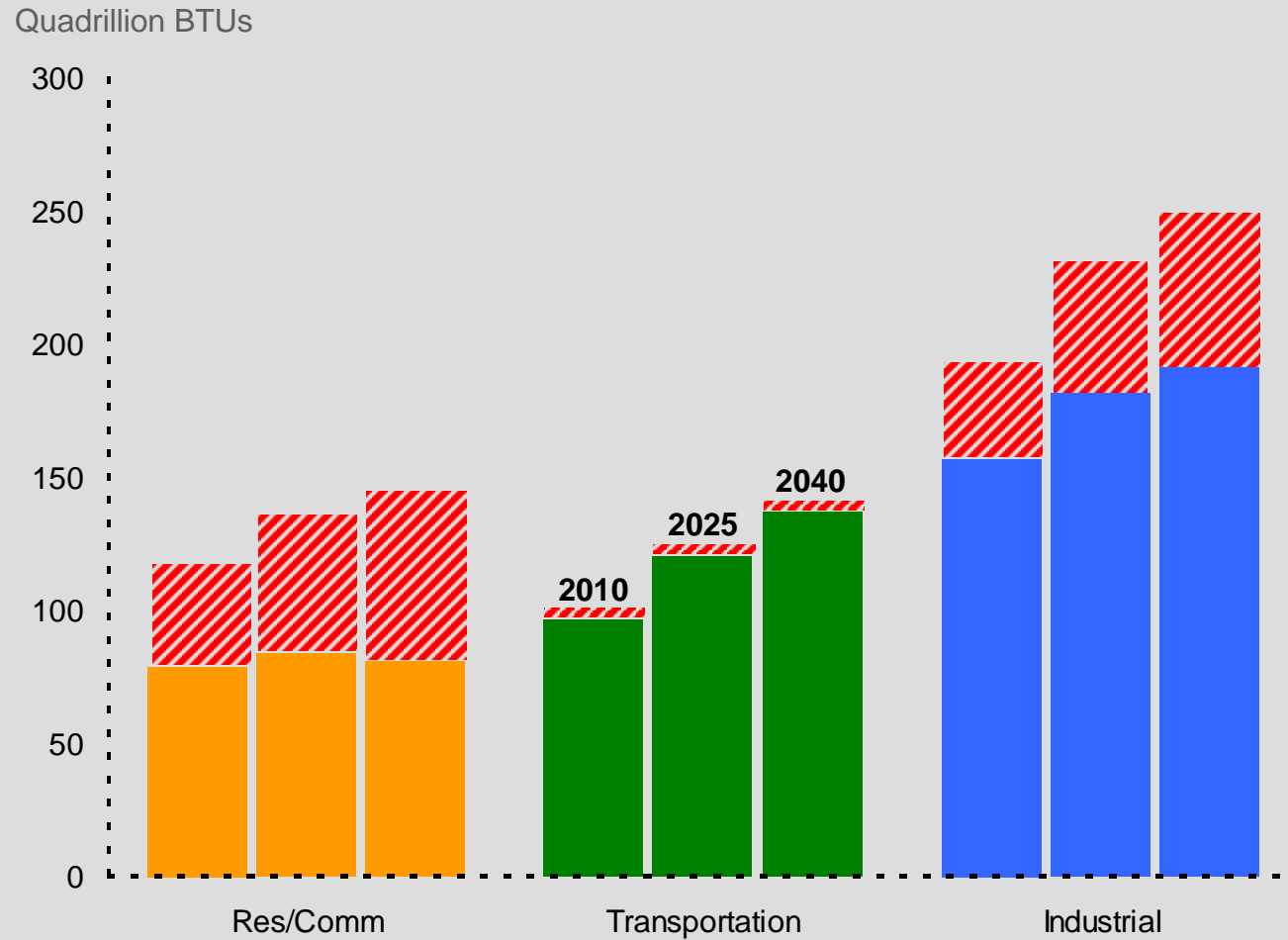


Non OECD Energy Demand

Quadrillion BTUs



Primary Energy Demand by Sector



Industrial



Industrial Energy Demand

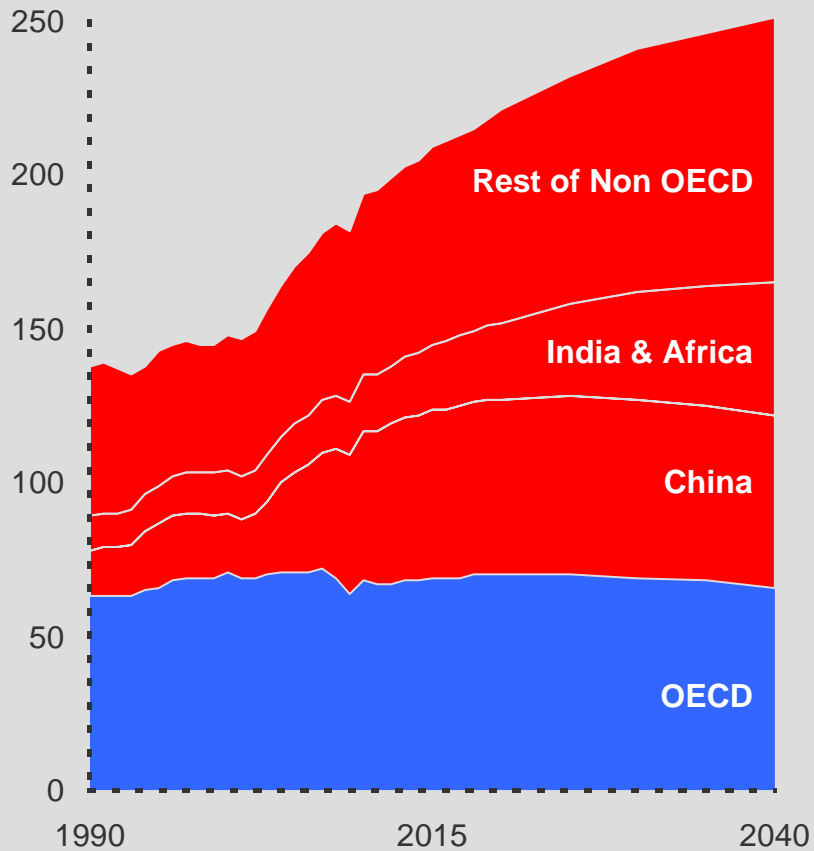
Quadrillion BTUs



Industrial Energy

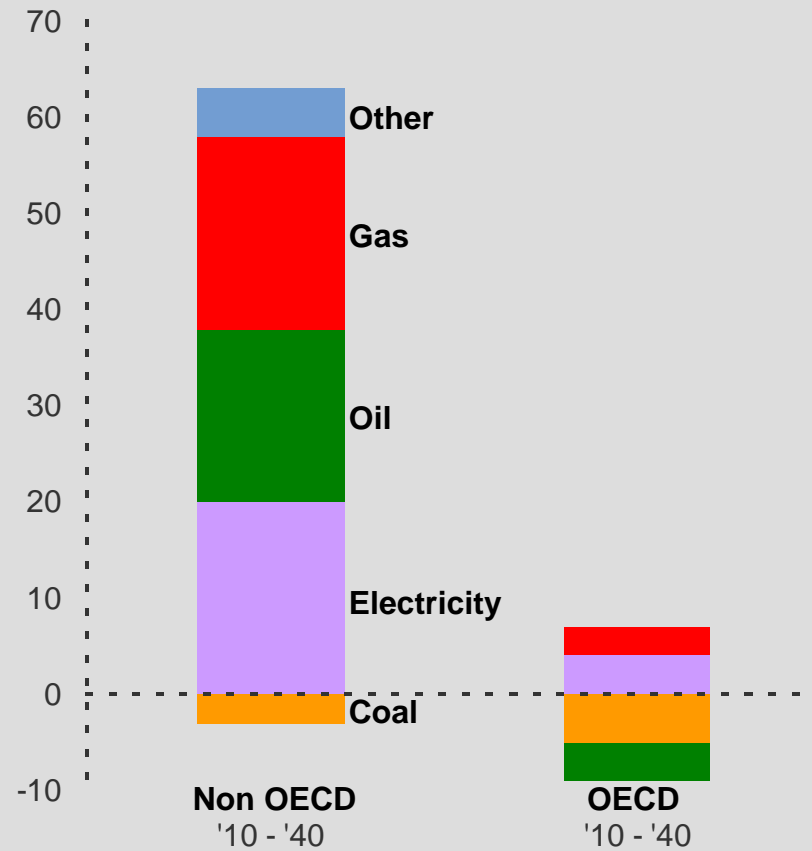
By Region

Quadrillion BTUs



Fuel Growth

Quadrillion BTUs



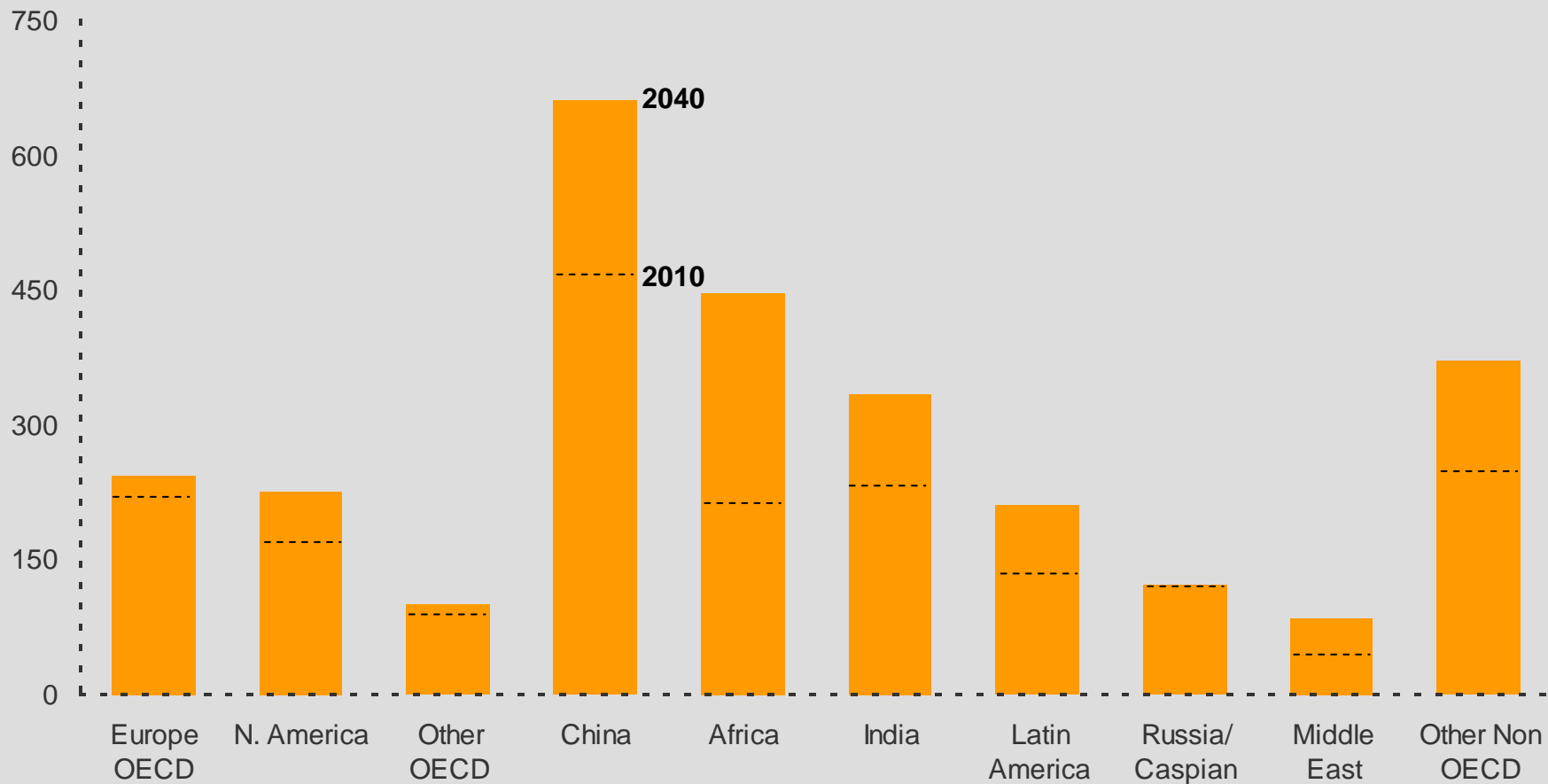
Residential / Commercial



Household Growth

2040

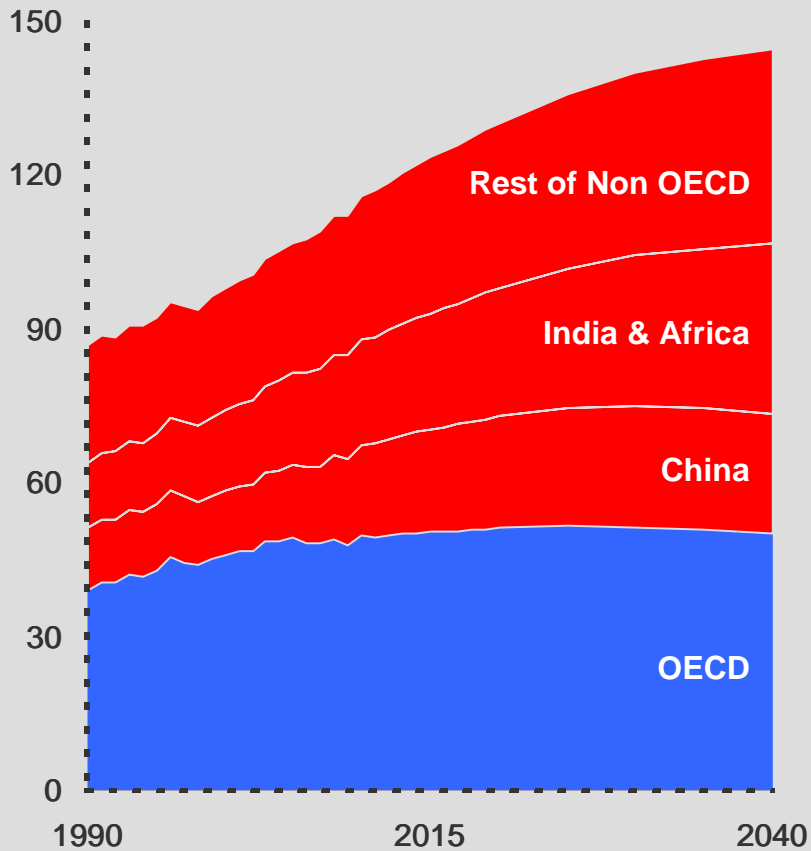
Million Households



Residential/Commercial

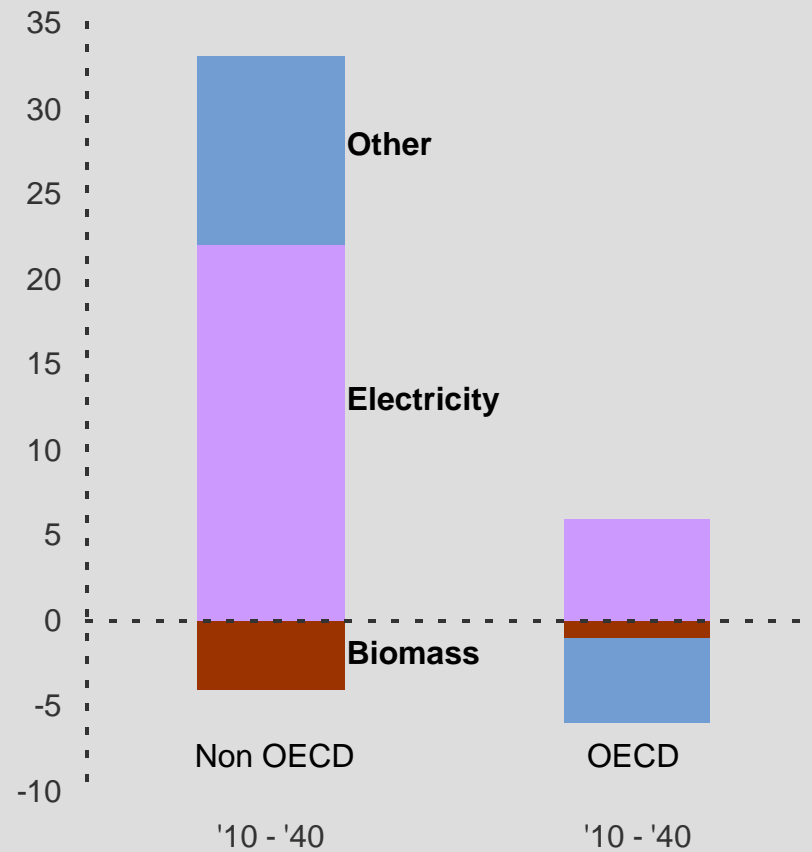
By Region

Quadrillion BTUs

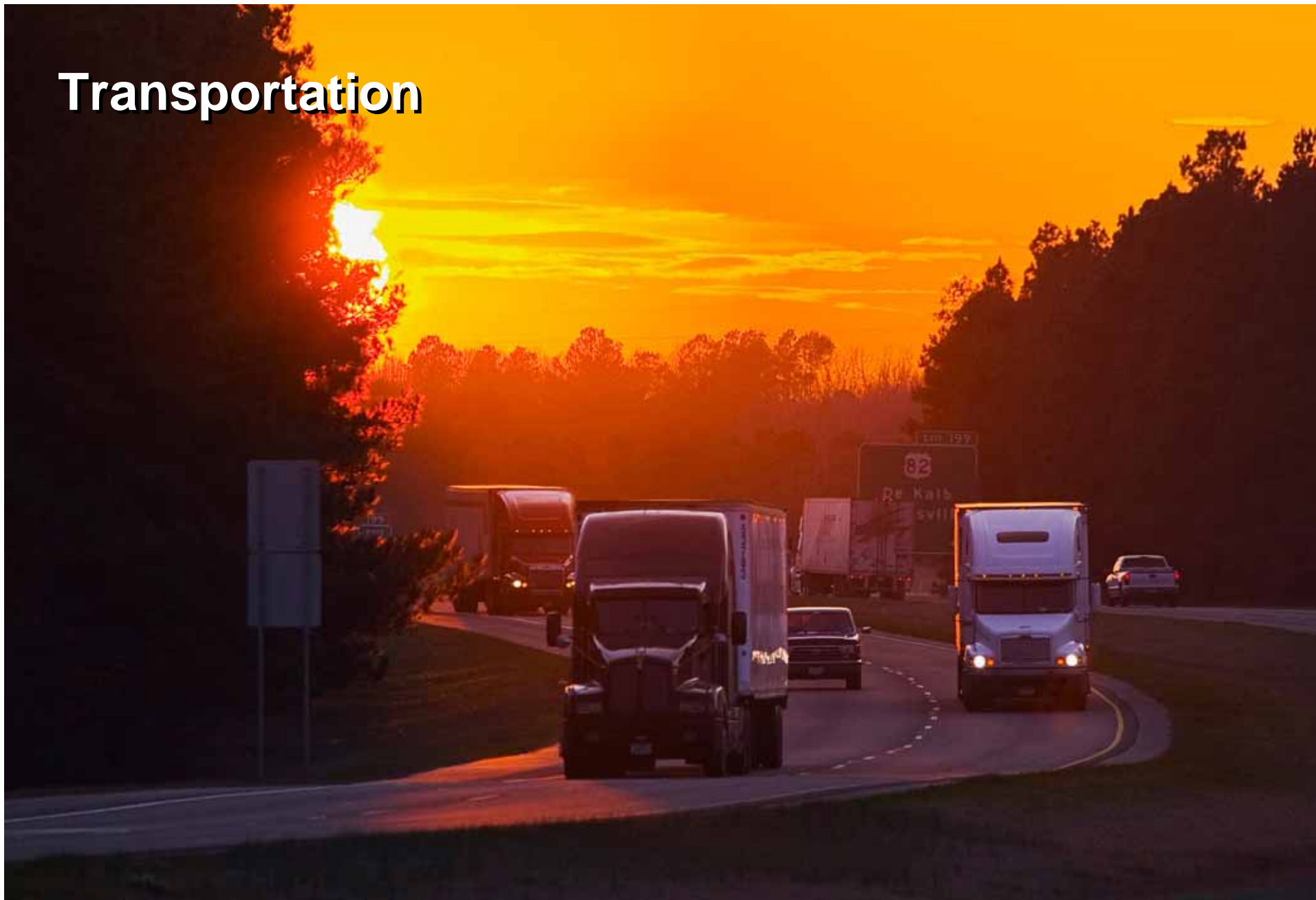


Fuel Growth

Quadrillion BTUs



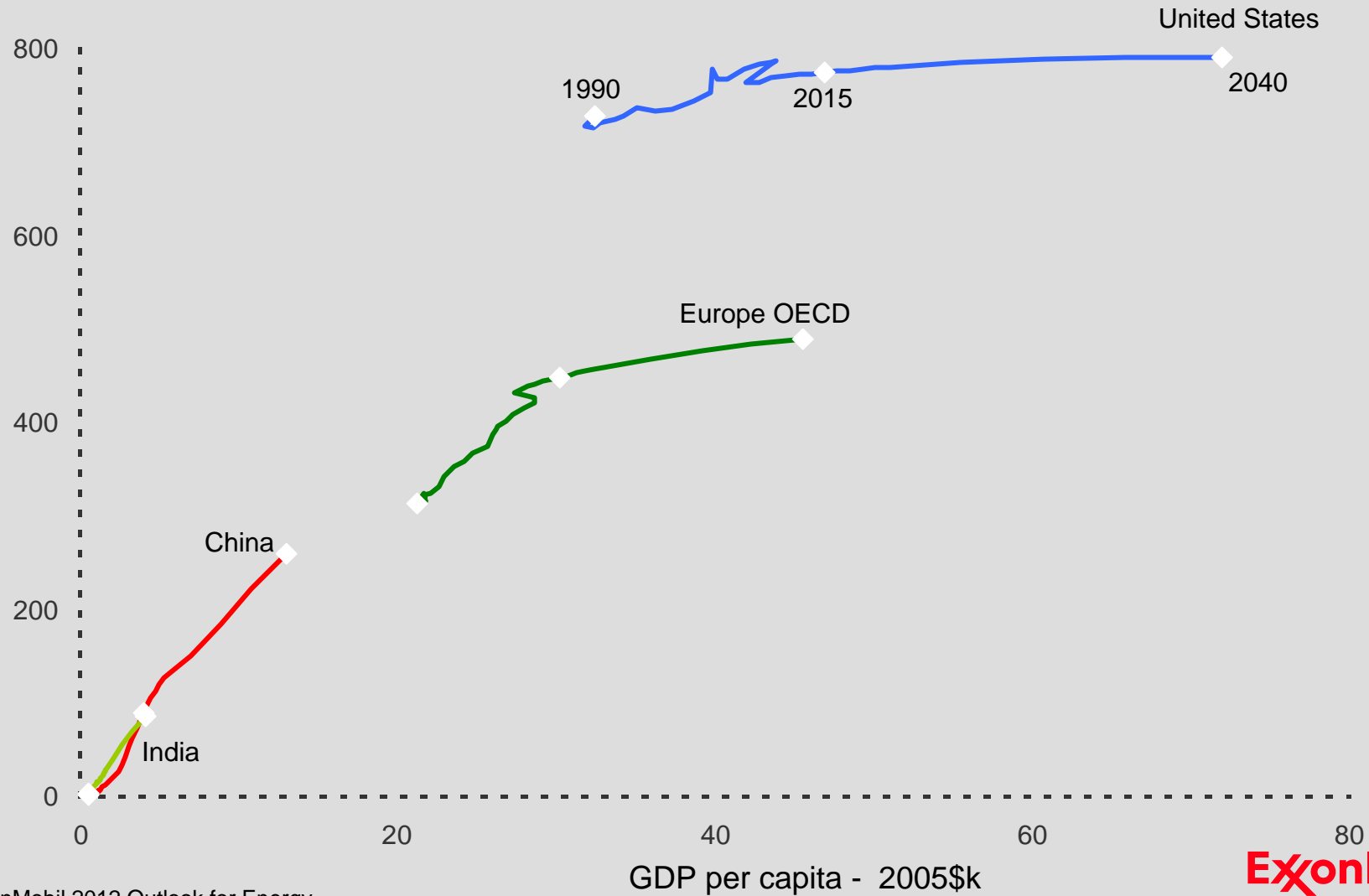
Transportation



Vehicle Penetration Levels

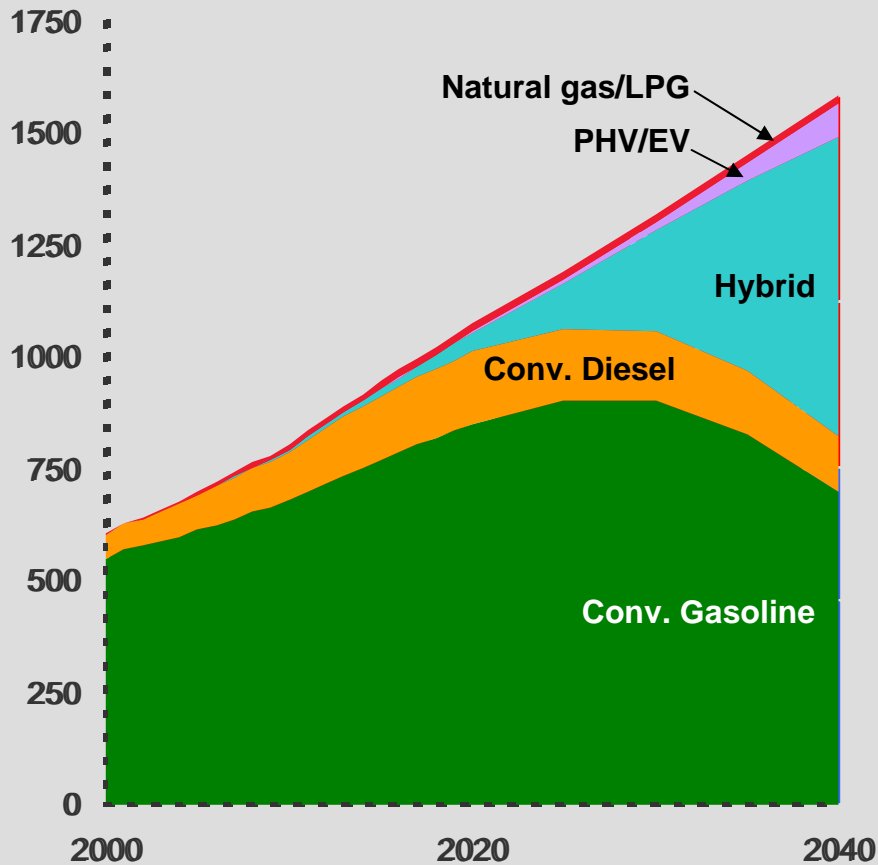
Vehicles

Light-Duty Vehicles / 1000 People



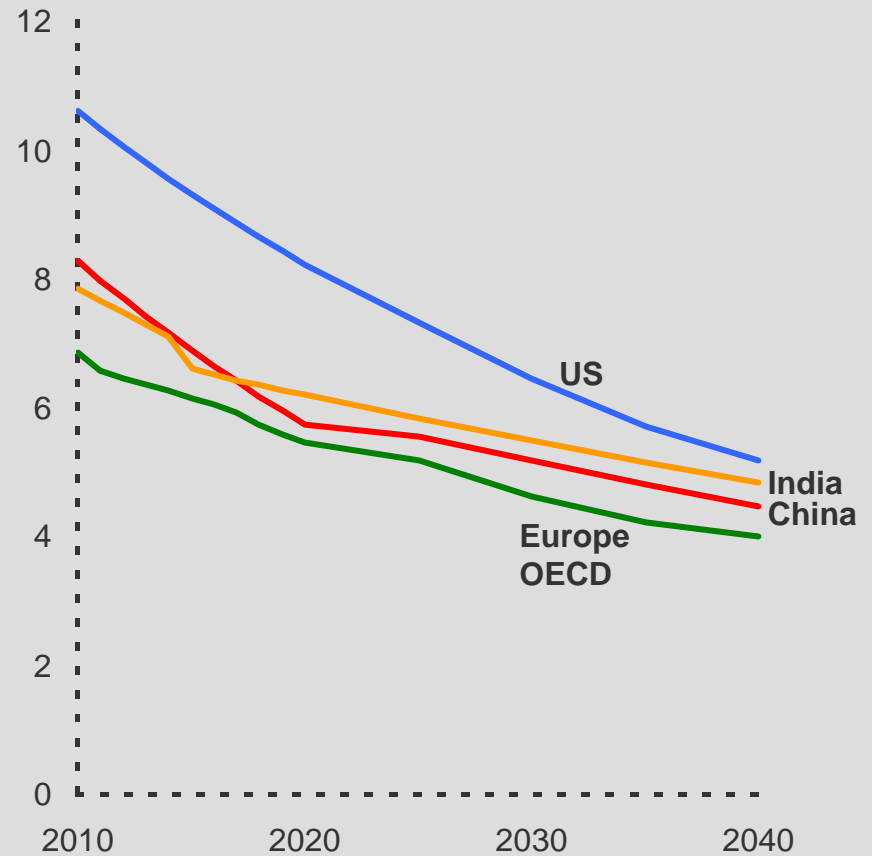
Light Duty Fleet and Efficiency

Light Duty Vehicle Fleet by Region
Million Vehicles



Average New Car

Liters per 100 kilometers

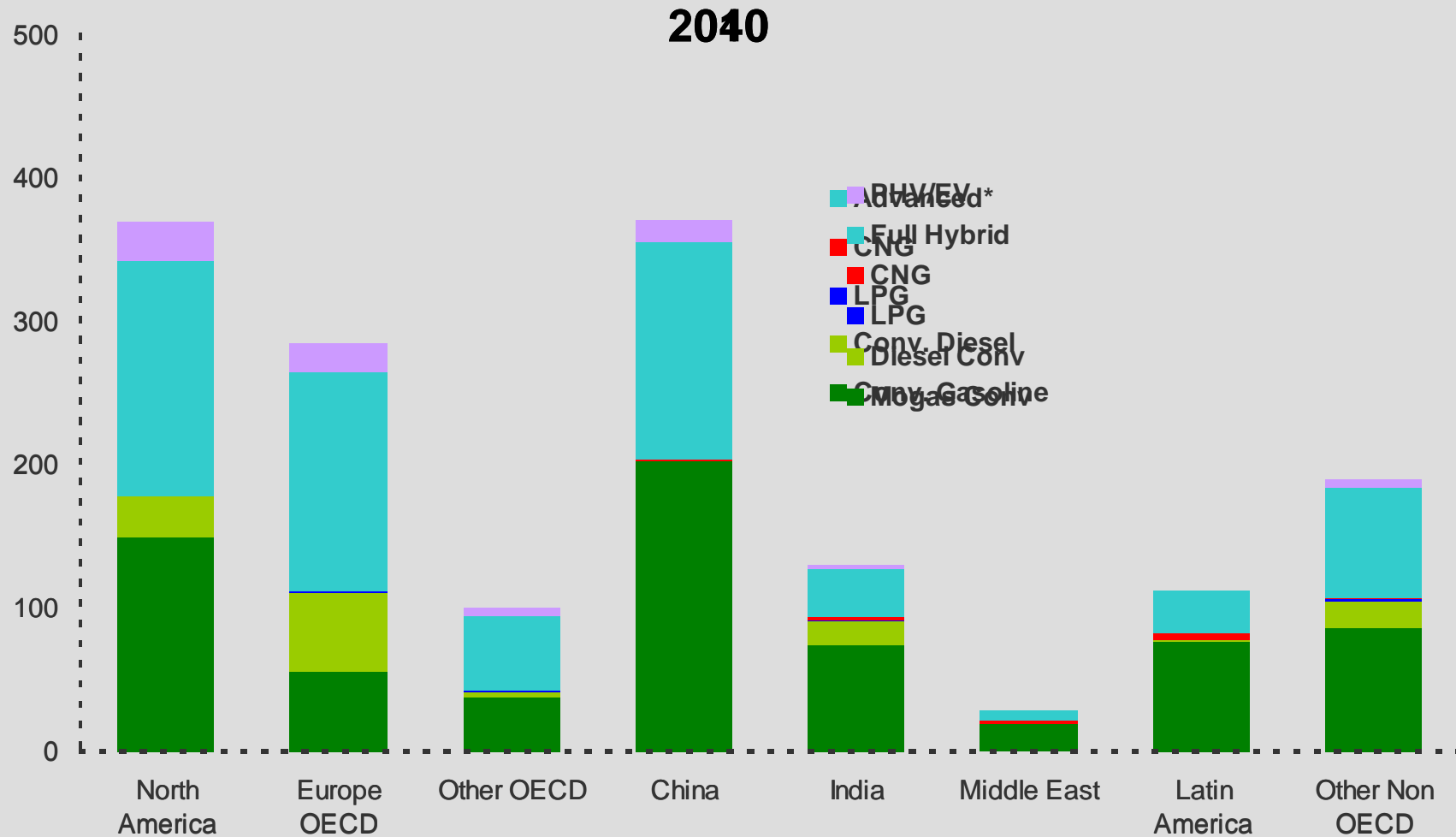


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Light Duty Vehicle Fleet

Powertrain Technology

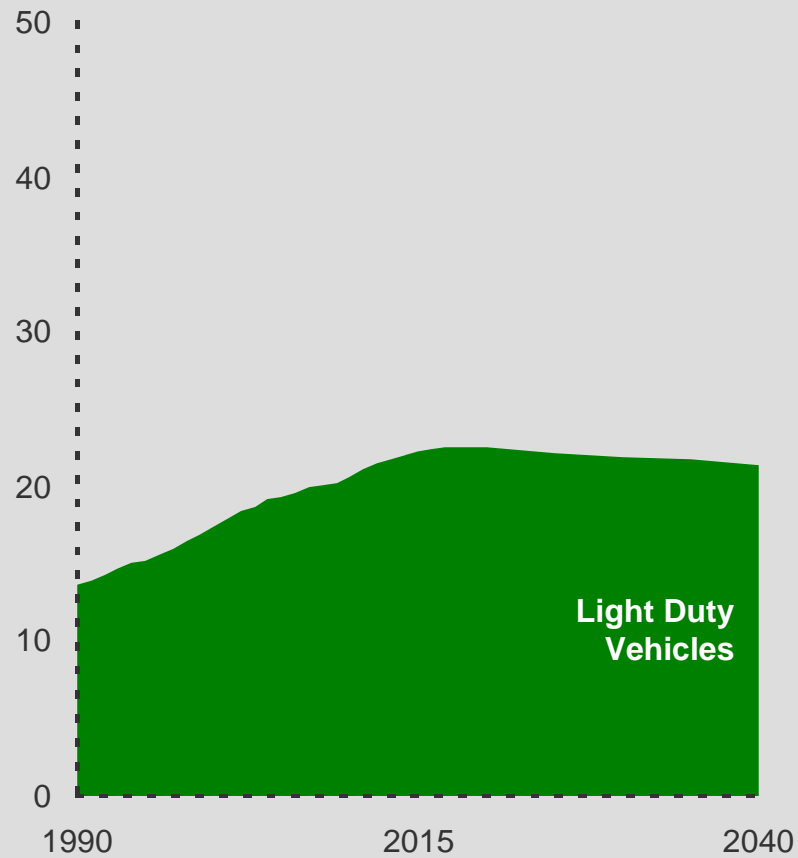
Millions of Vehicles



Transportation Fuel Demand

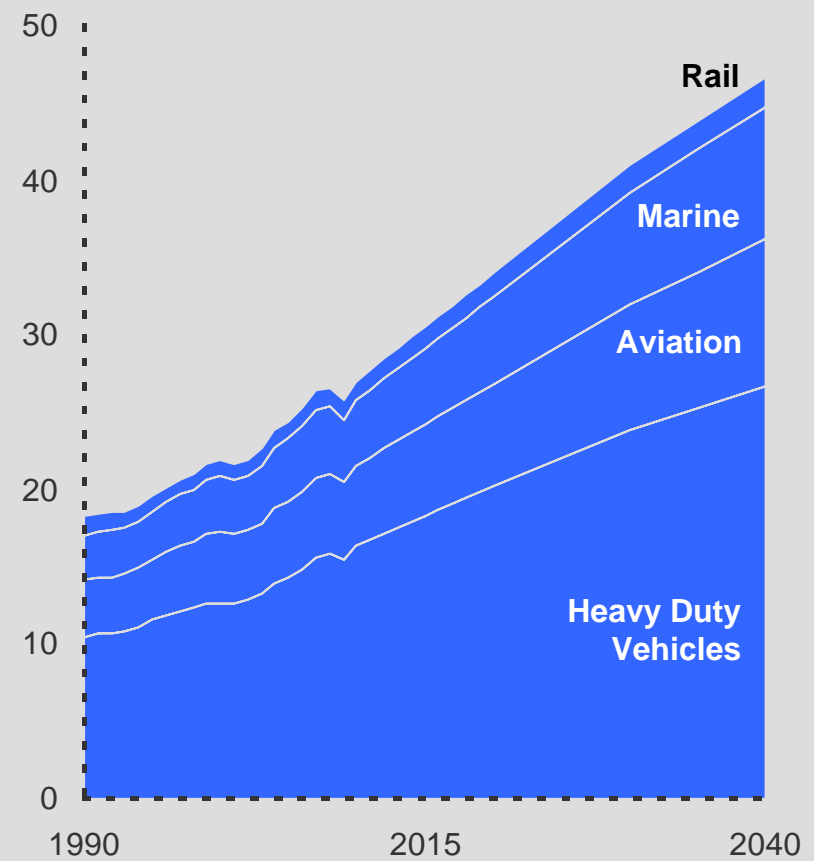
Personal

MBDOE



Commercial

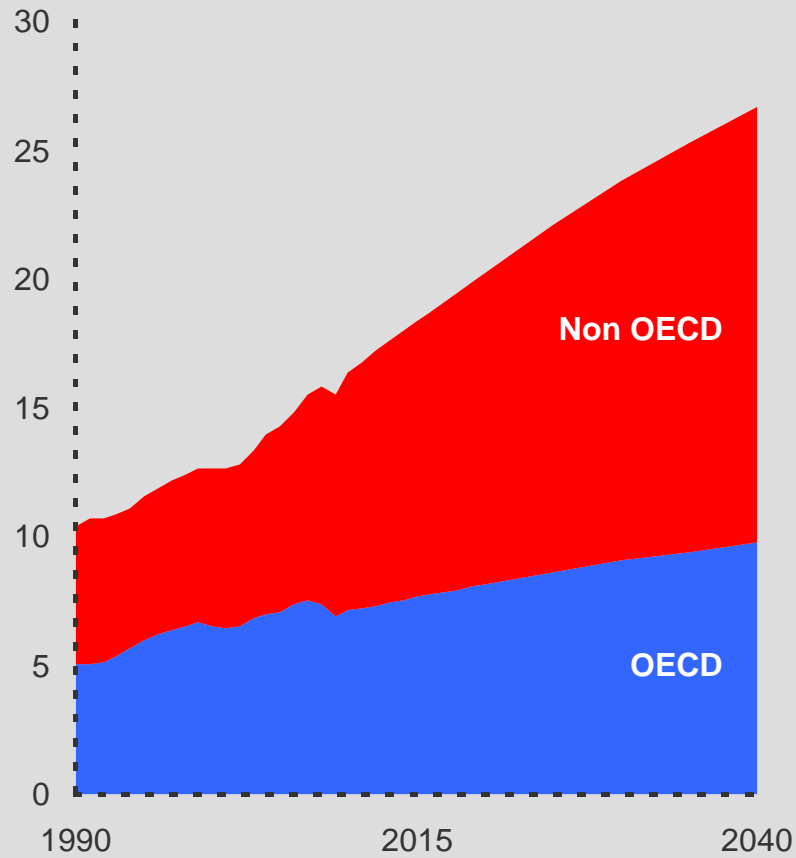
MBDOE



Heavy Duty Demand and Efficiency

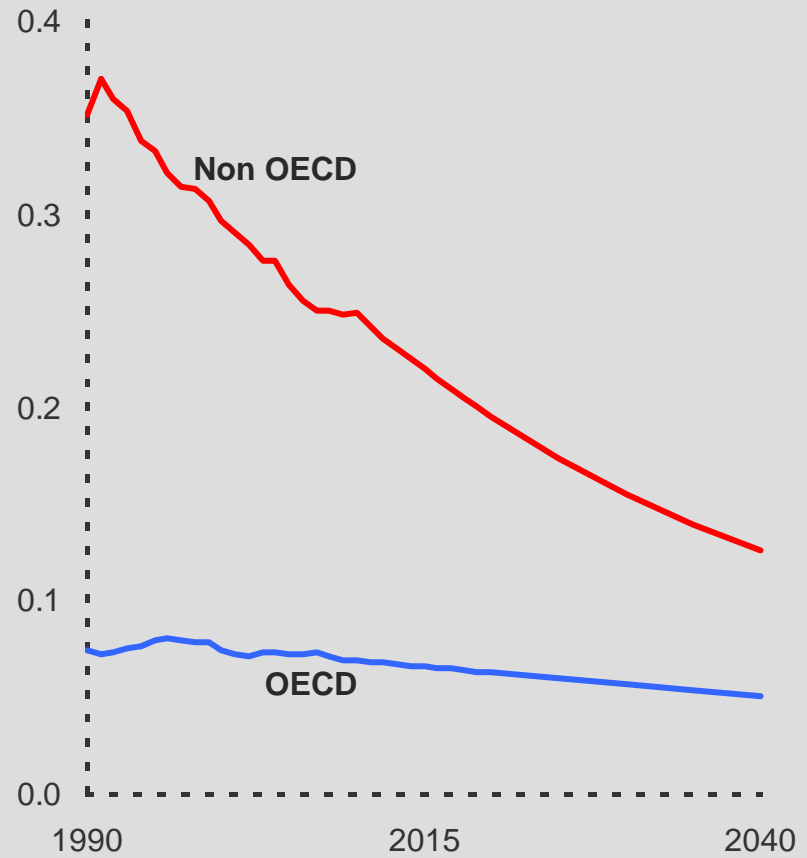
Demand By Region

MBDOE



Intensity

BOE / 2005\$k GDP



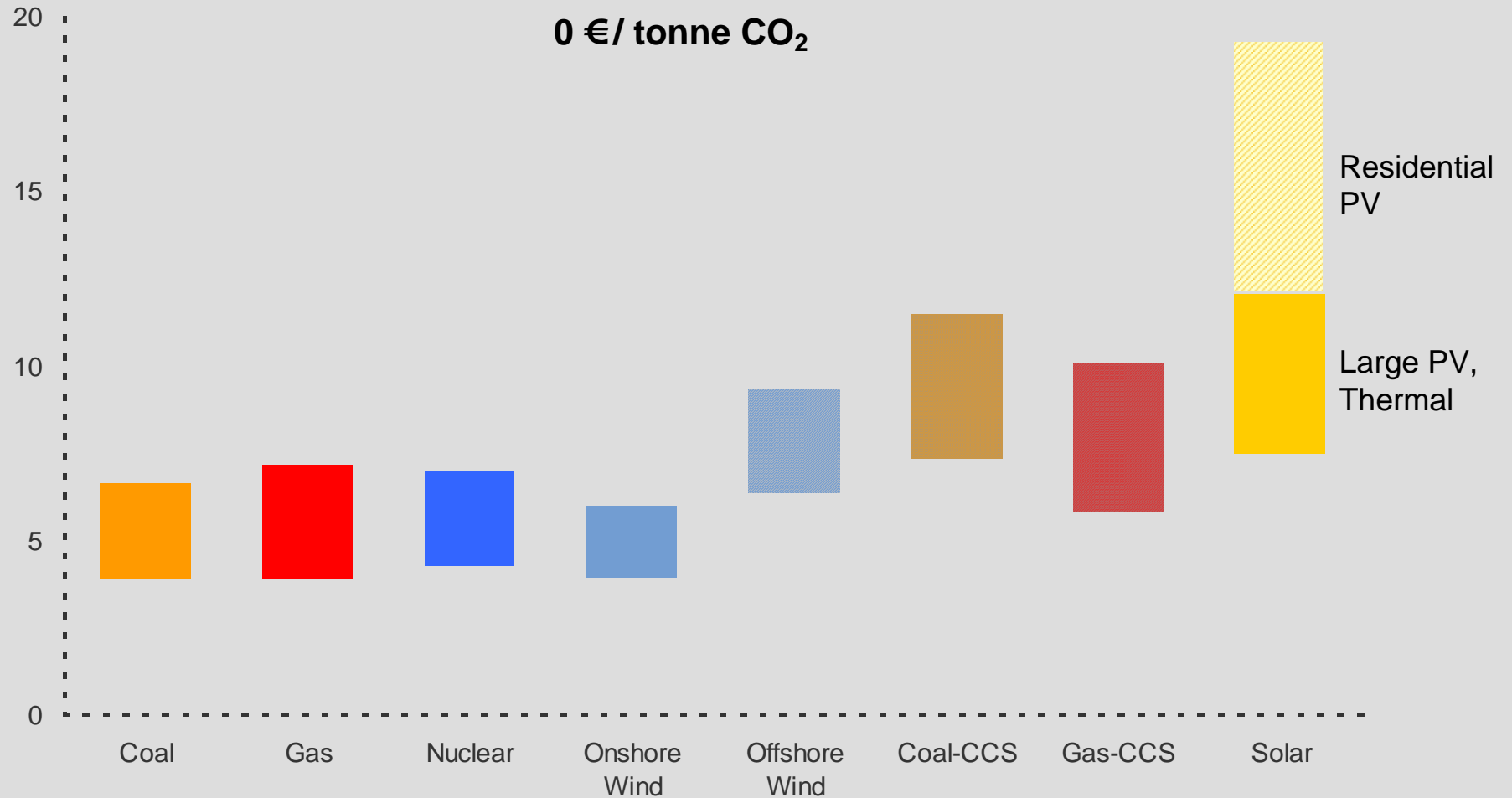


Electricity Generation

Economic Choices for Europe Electricity

Baseload, Startup 2030

2011 Eurocents/KWh

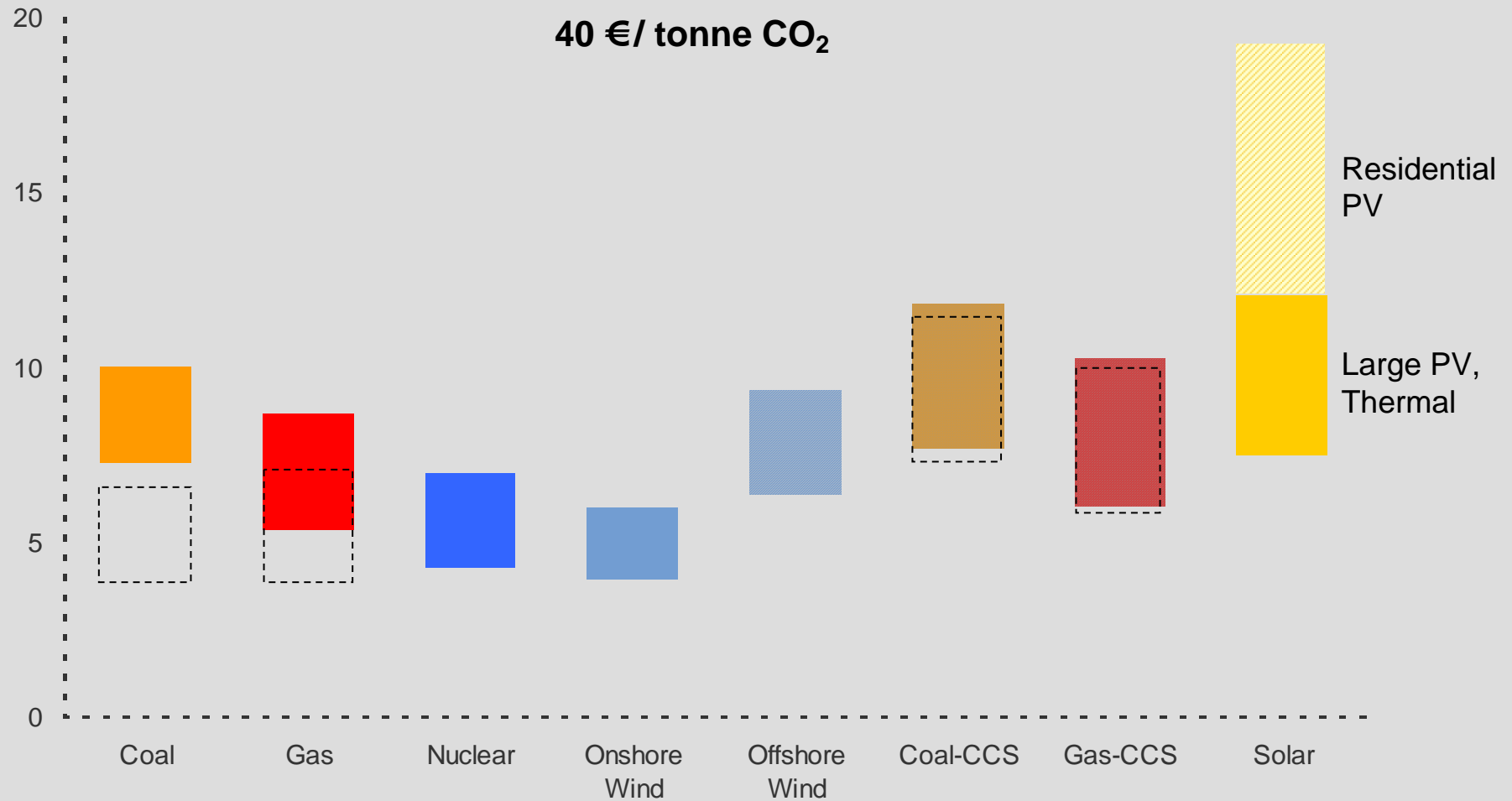


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Economic Choices for Europe Electricity

Baseload, Startup 2030

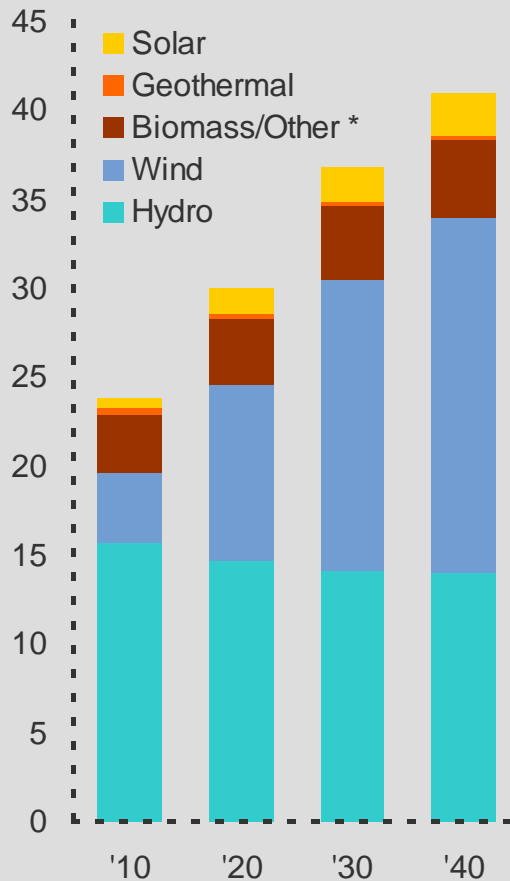
2011 Eurocents/KWh



Renewables Share of Power

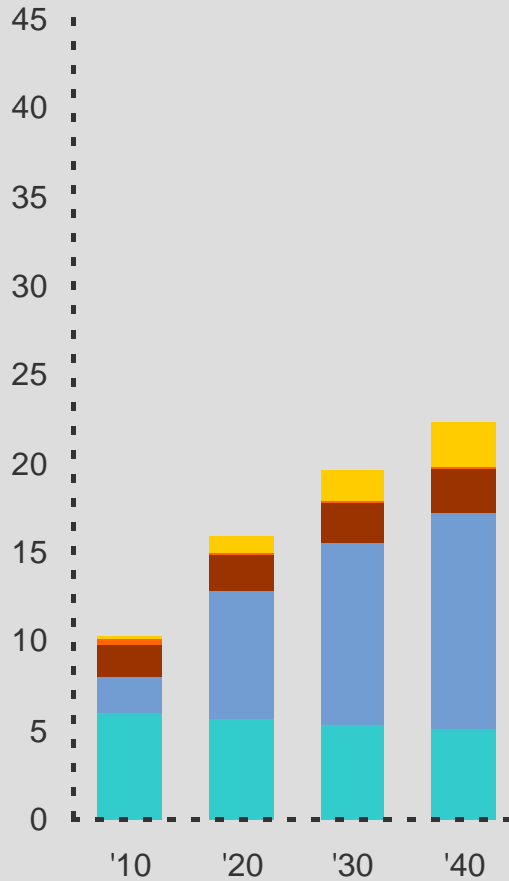
Europe

Percent of TWh



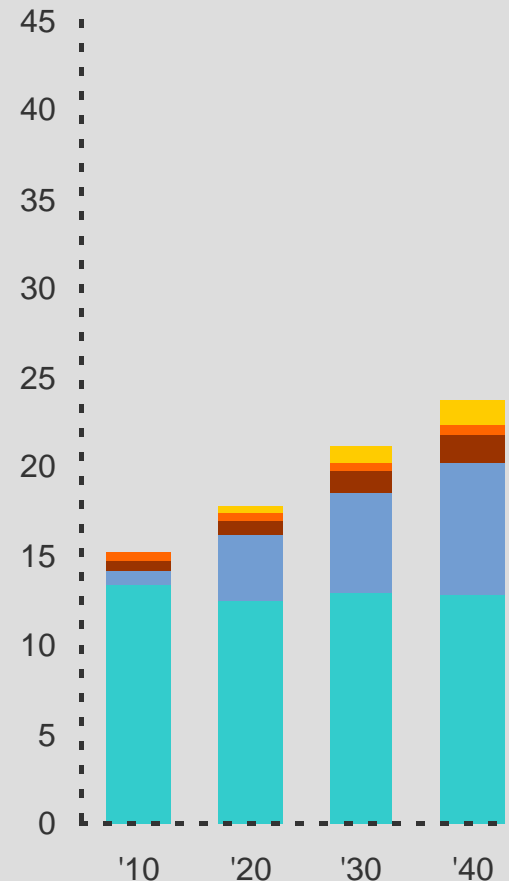
United States

Percent of TWh



Asia Pacific

Percent of TWh



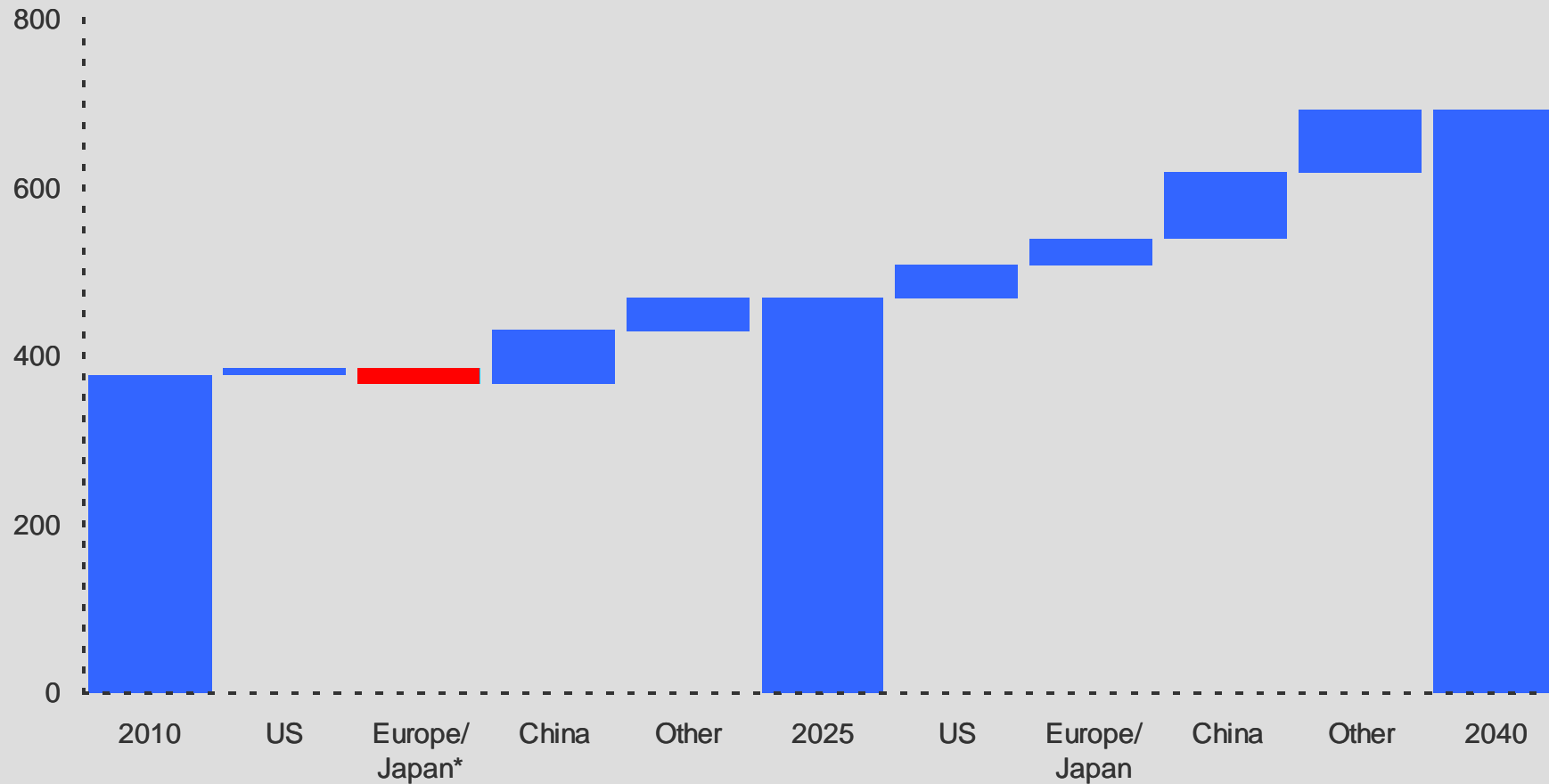
*Biomass includes Municipal Solid Waste



Nuclear Development

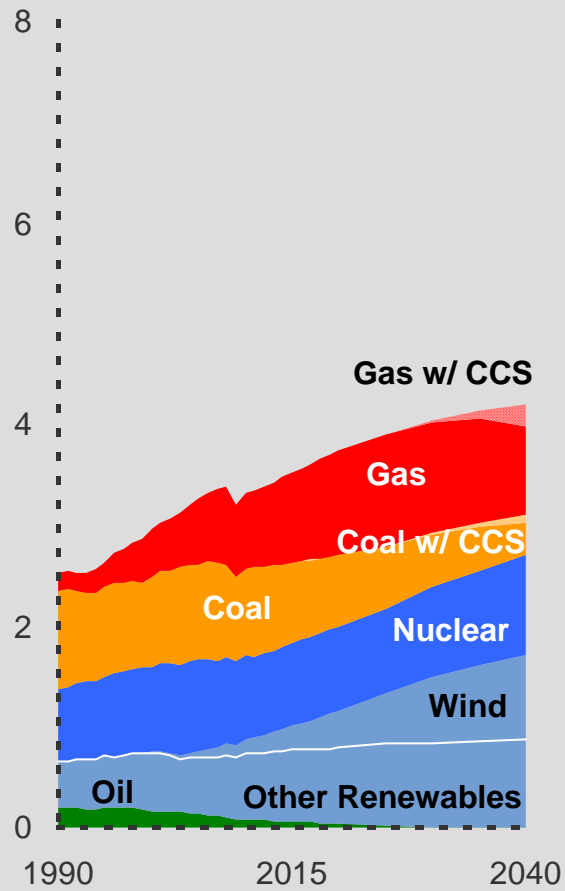
Capacity Growth

GW Installed

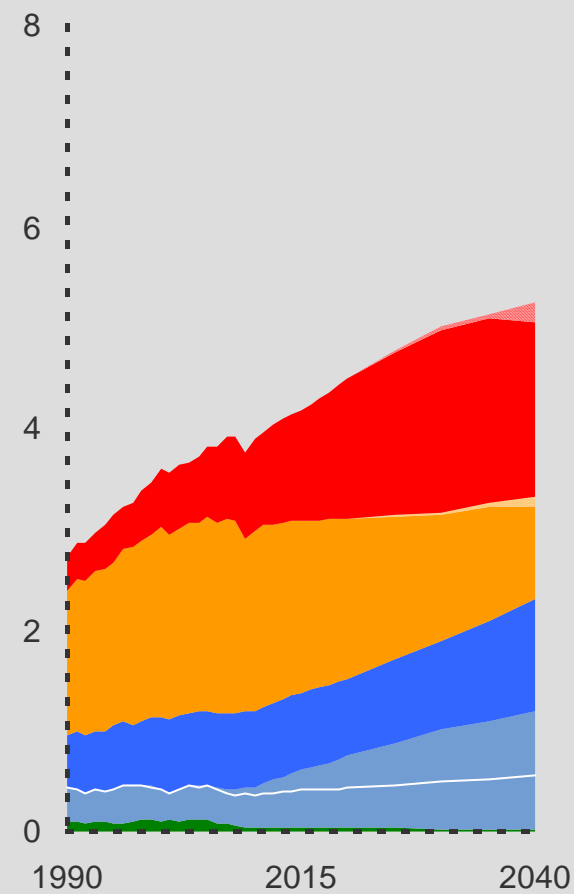


Fuels for Electricity

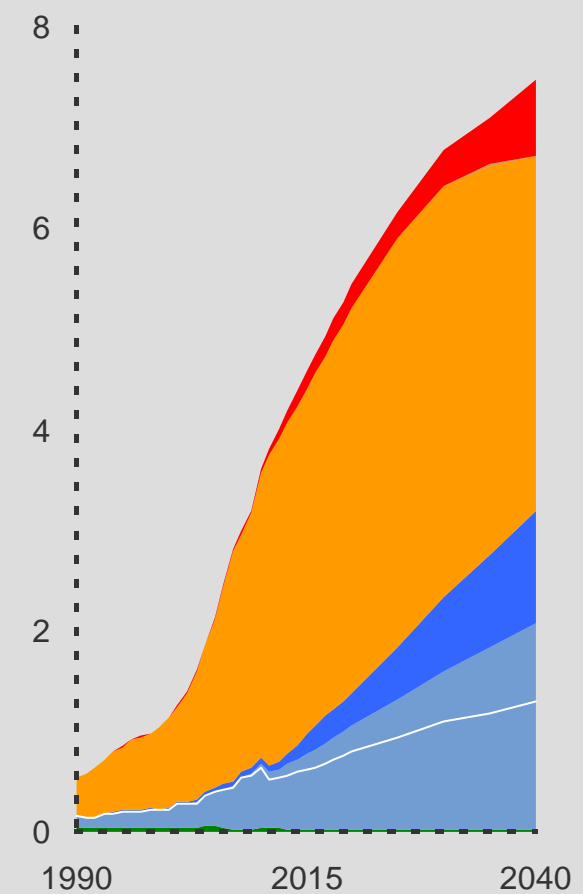
Europe
k TWh



United States
k TWh



China
k TWh

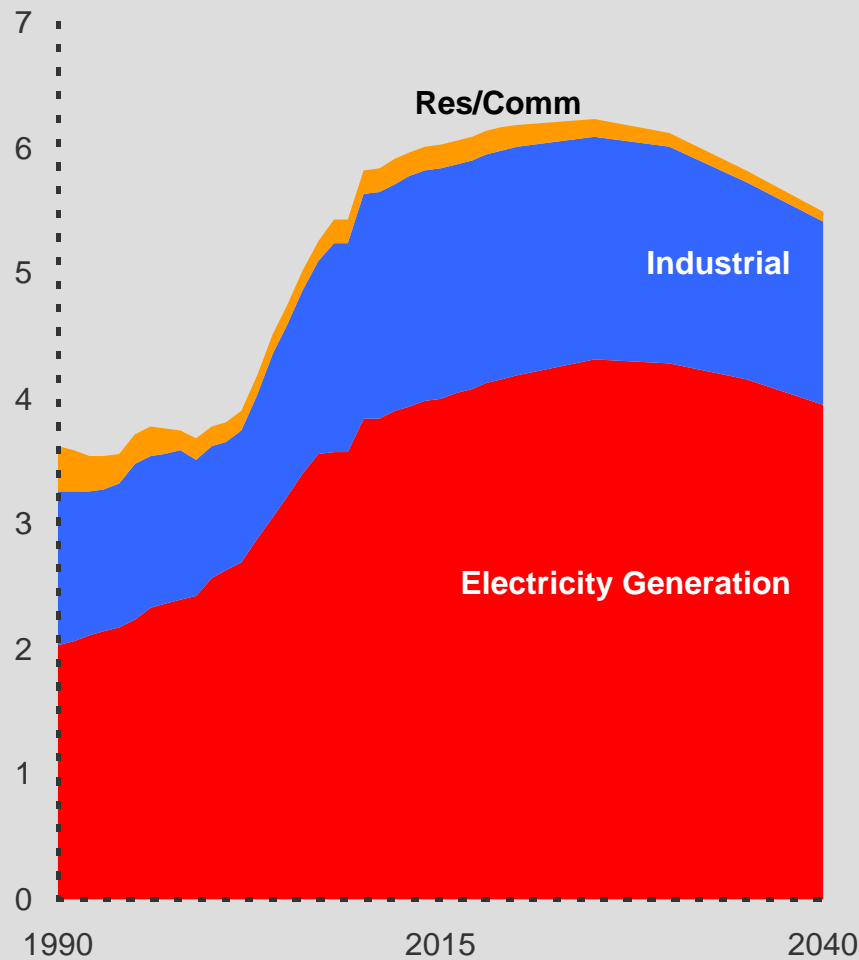


* Generation by Type

Coal Demand

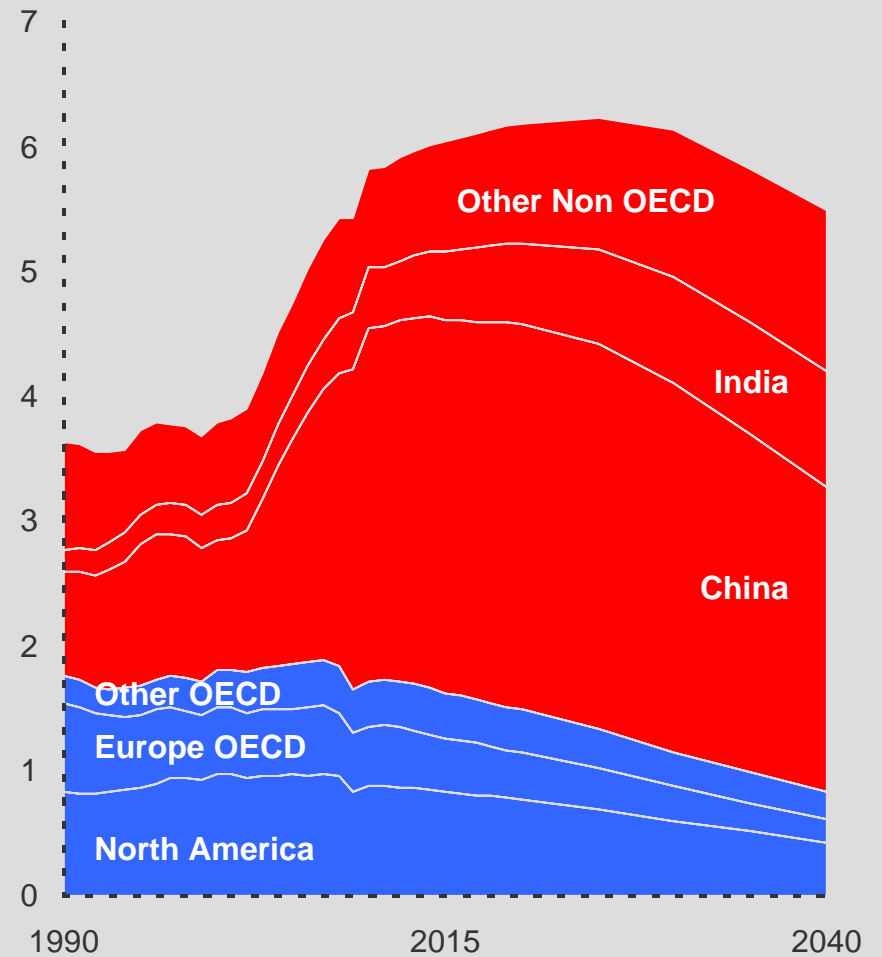
By Sector

Billion Tons



By Region

Billion Tons

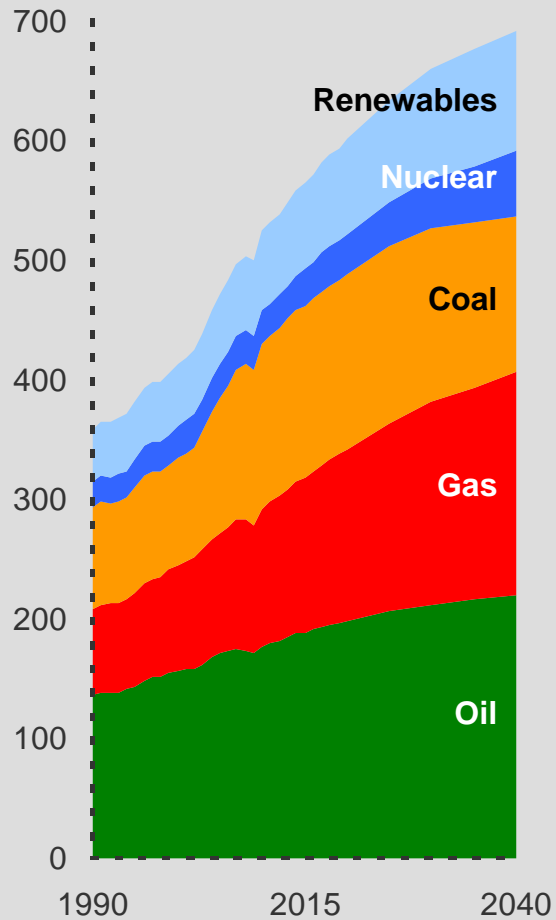


Supply

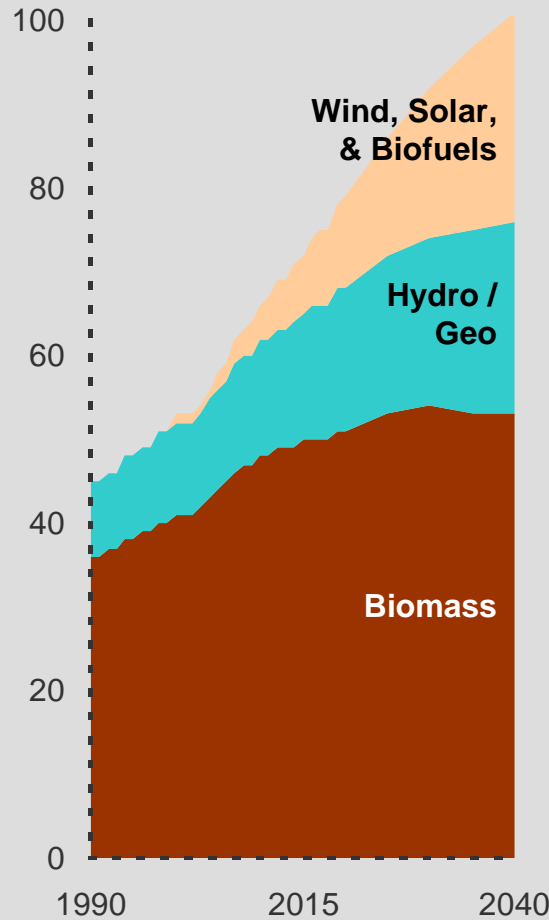


Diverse Fuel Mix

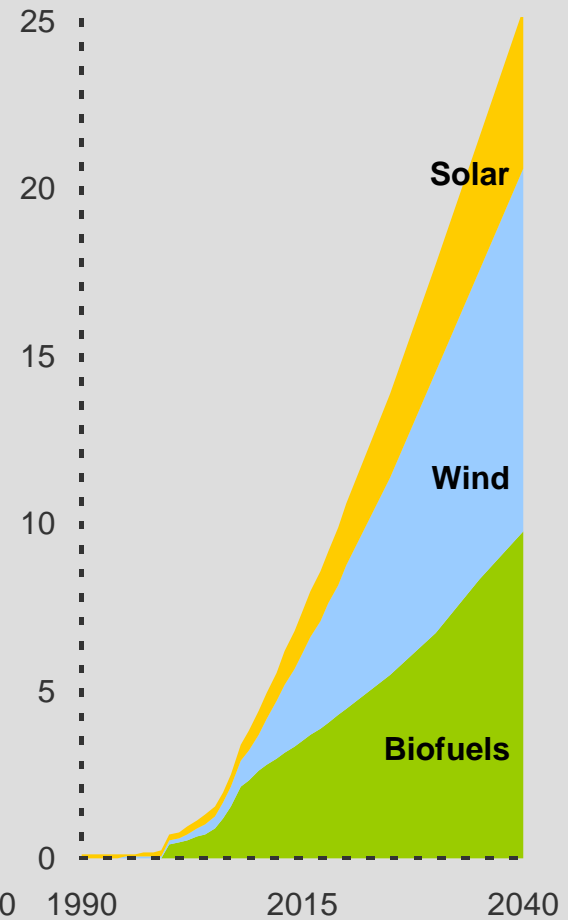
Primary Energy
Quadrillion BTUs



Renewables
Quadrillion BTUs



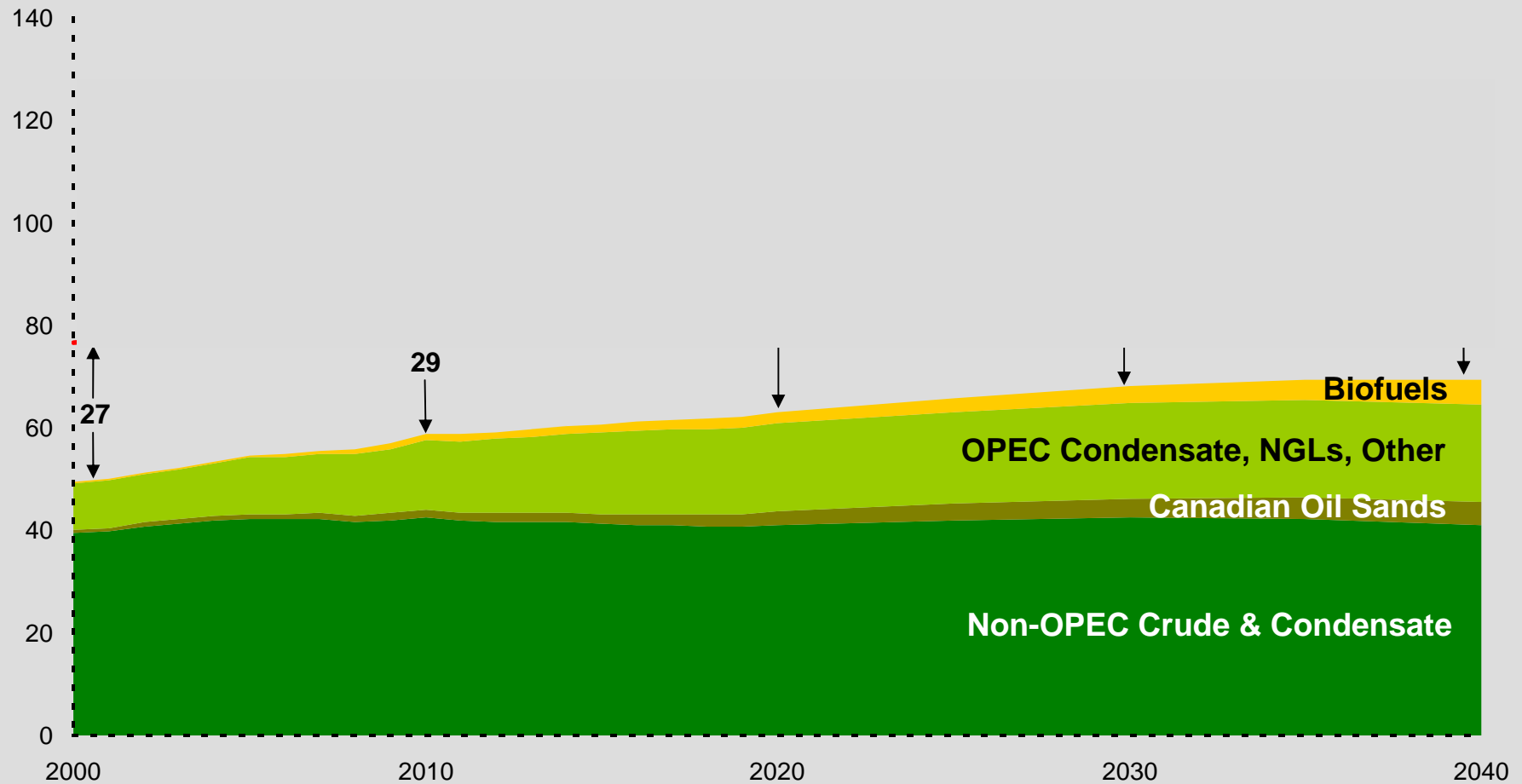
Wind, Solar, & Biofuels
Quadrillion BTUs



Liquids Supply Outlook

Liquids Supply

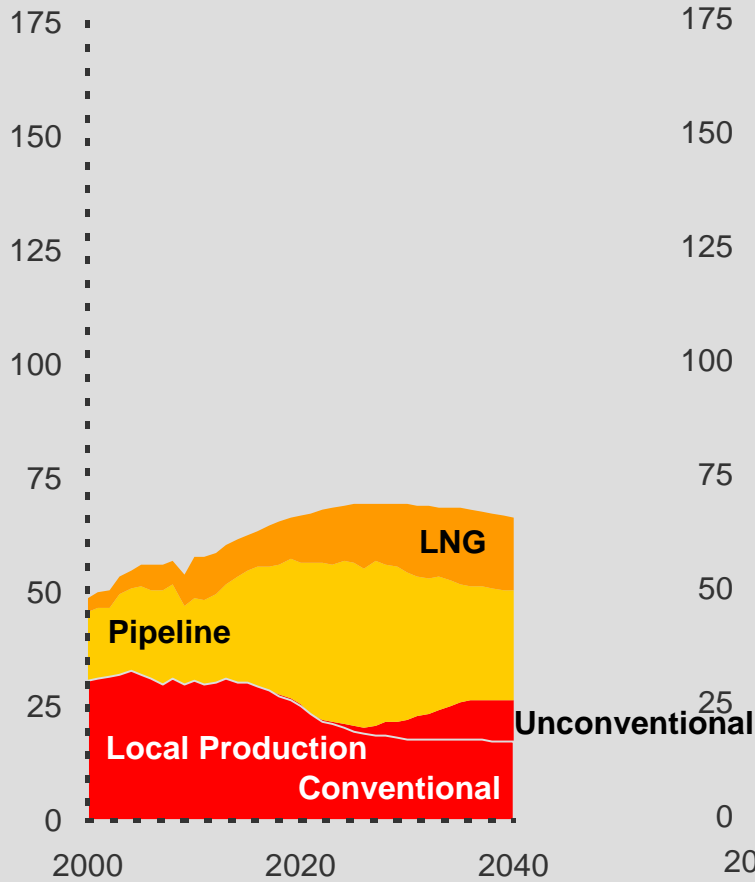
MBDOE



Gas Supply

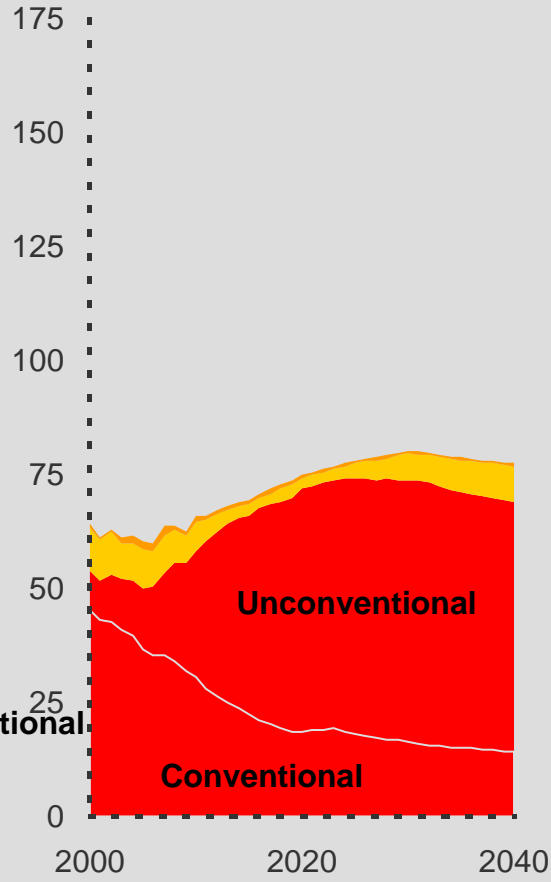
Europe

BCFD



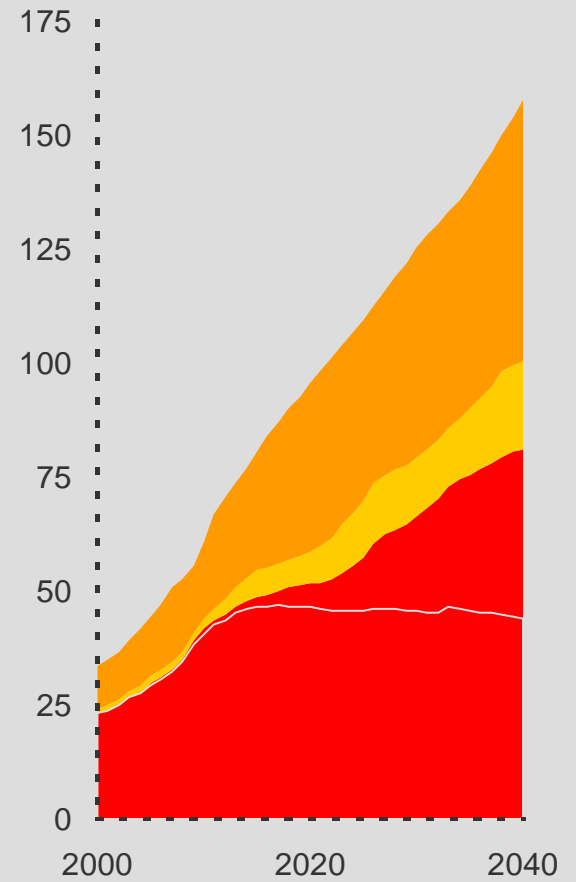
United States

BCFD



Asia Pacific

BCFD

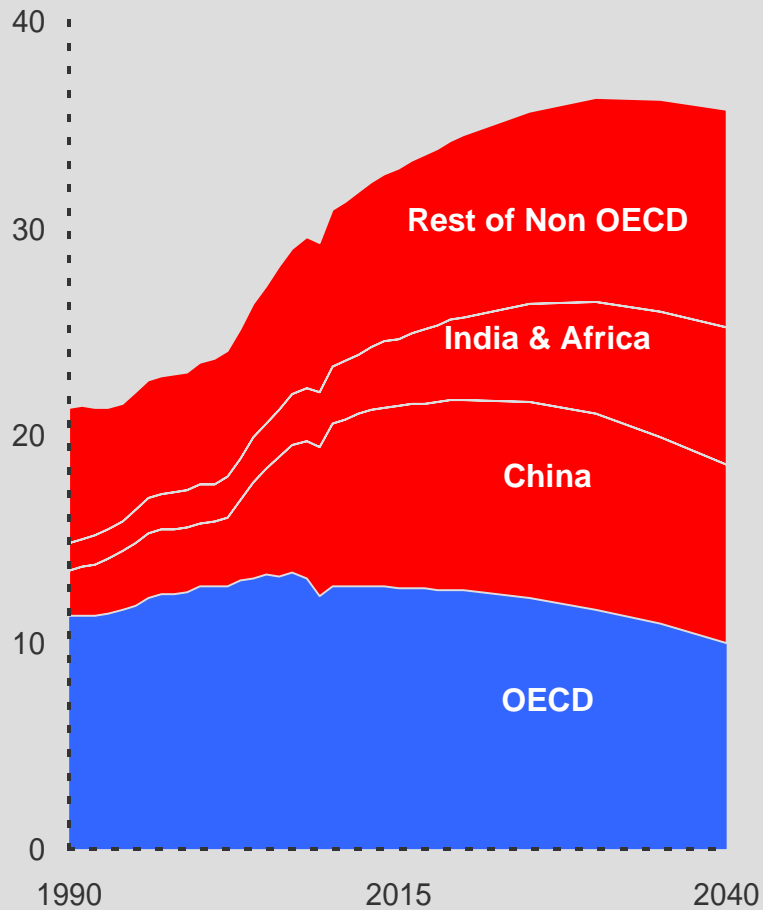


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Energy-Related CO₂ Emissions

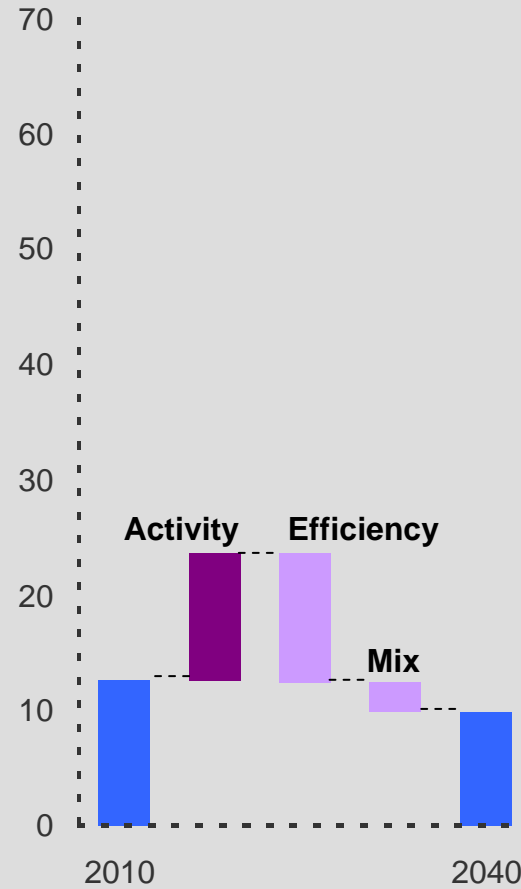
By Region

Billion Tons



OECD

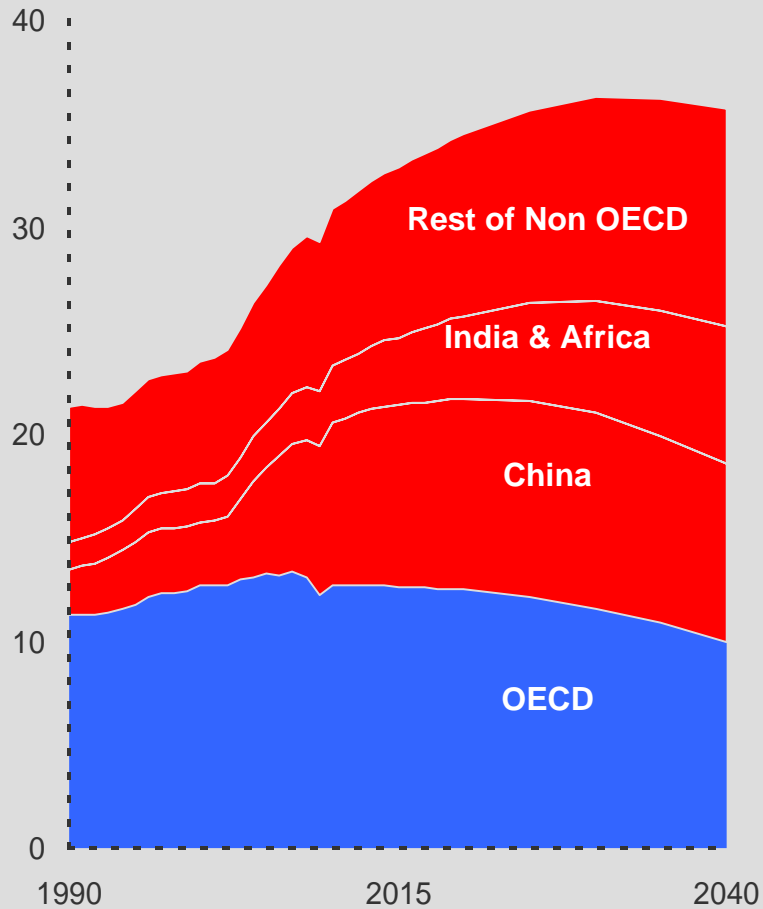
Billion Tons



Energy-Related CO₂ Emissions

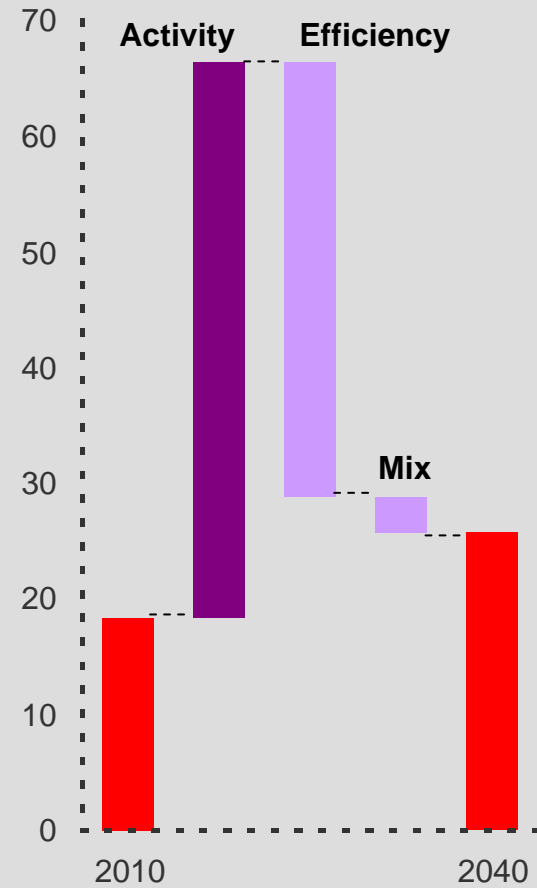
By Region

Billion Tons



Non OECD

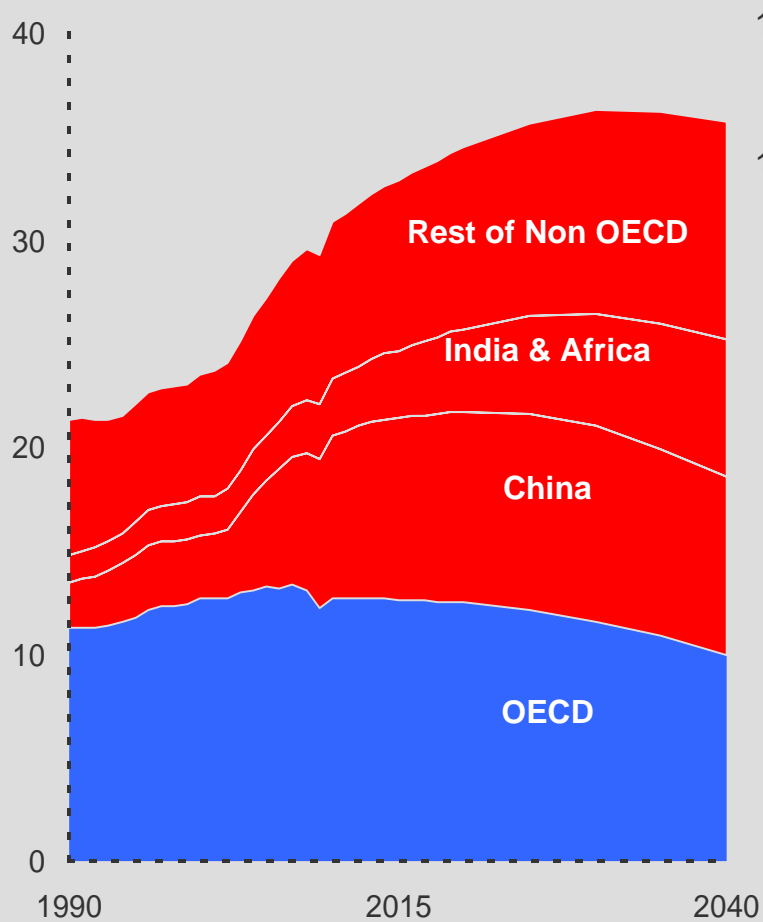
Billion Tons



Energy-Related CO₂ Emissions

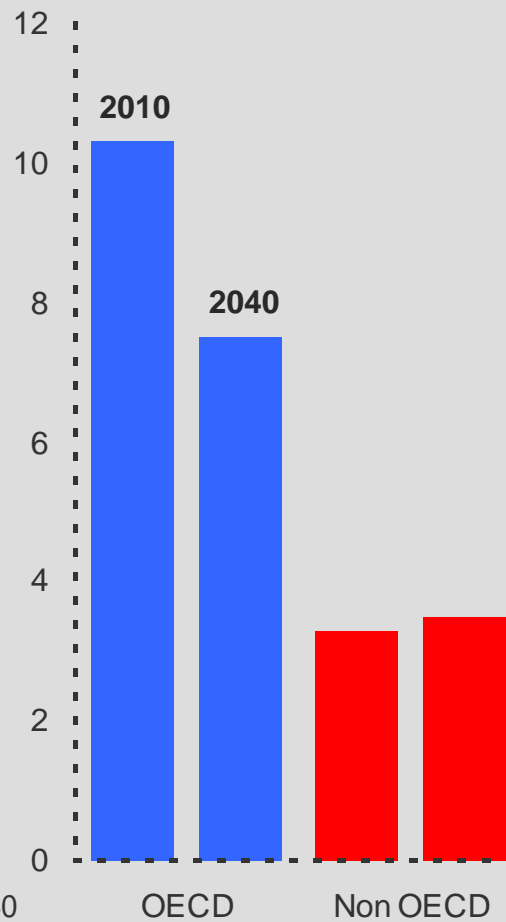
By Region

Billion Tons



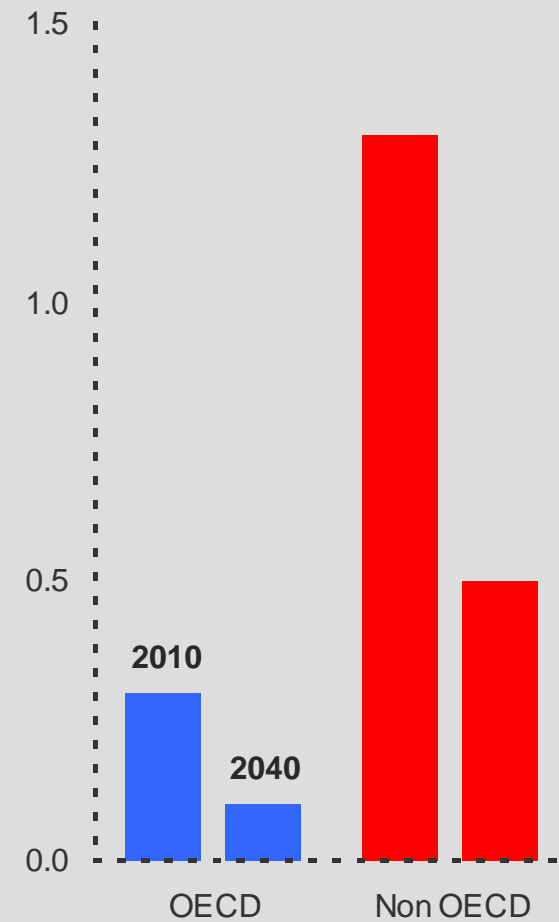
Emissions per Capita

Tons / Person



Emissions per GDP

Tons / 2005\$ k GDP



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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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