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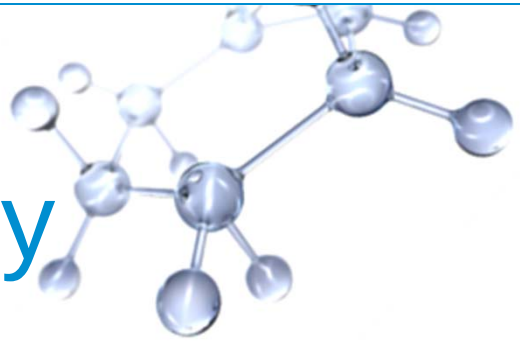

The Outlook for Energy

a view to 2030

Speaker
Event
Date

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 in Item 1 of ExxonMobil's latest report on Form 10-K). This material is not to be reproduced without the permission of Exxon Mobil Corporation.

Importance of Energy

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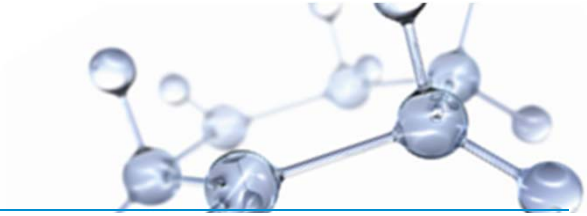
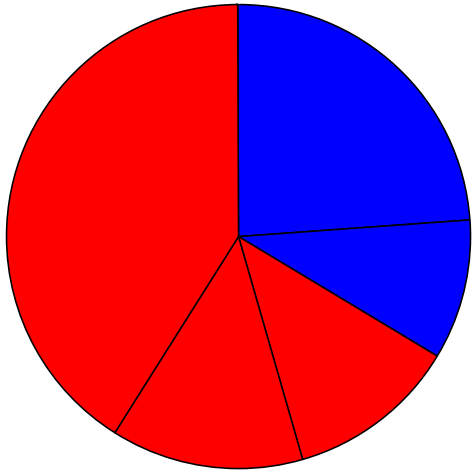
Your Energy Use



EU



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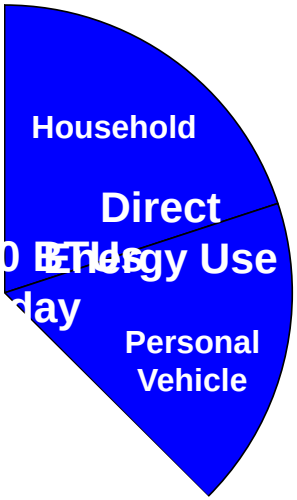
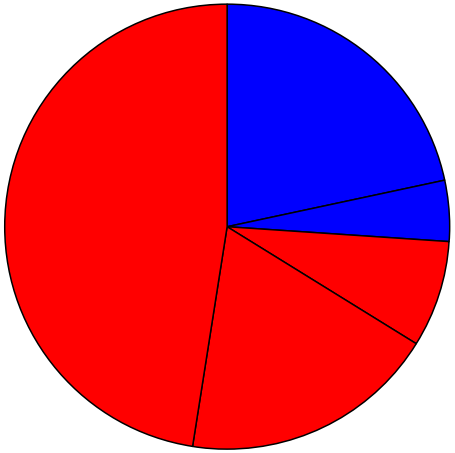
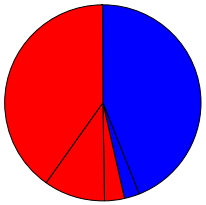


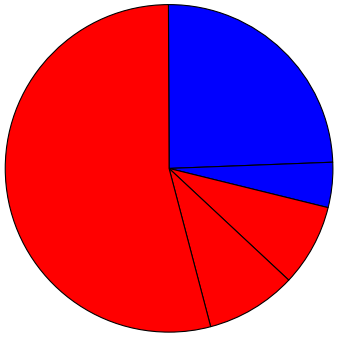
Middle East



Africa



Asia Pacific



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Our Key Energy Challenges

- Reducing poverty and improving living standards
- Supporting economic growth
- Minimizing impacts on the environment
- Maintaining energy security

➢ Development of reliable and a
efficiency gains – are essentia

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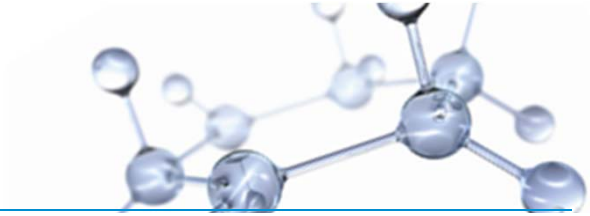
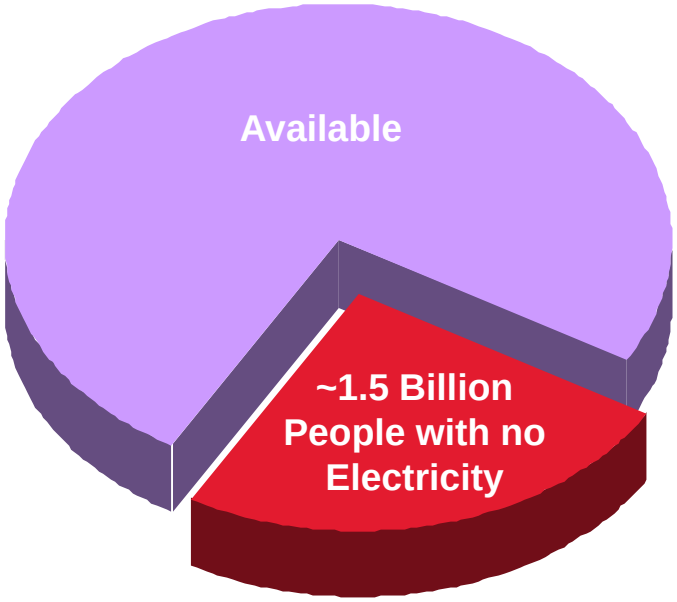
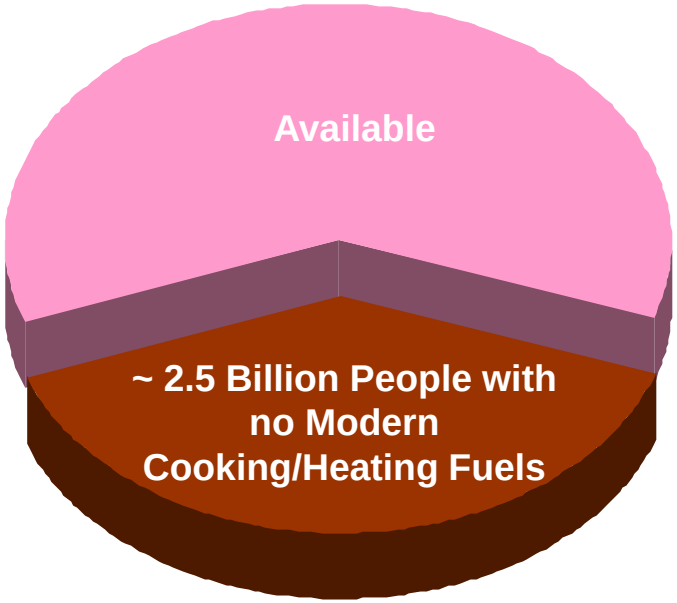
Challenge: Meeting Basic Needs



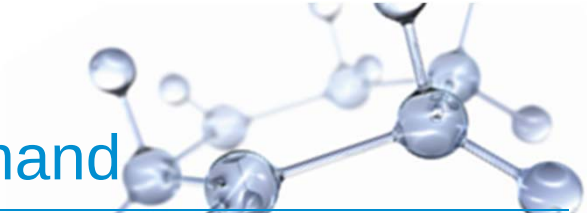
Electricity



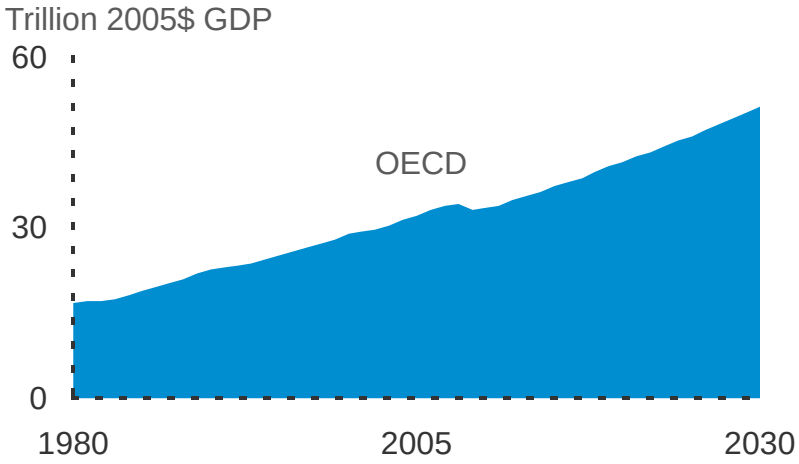
Modern Cooking/Heating Fuels



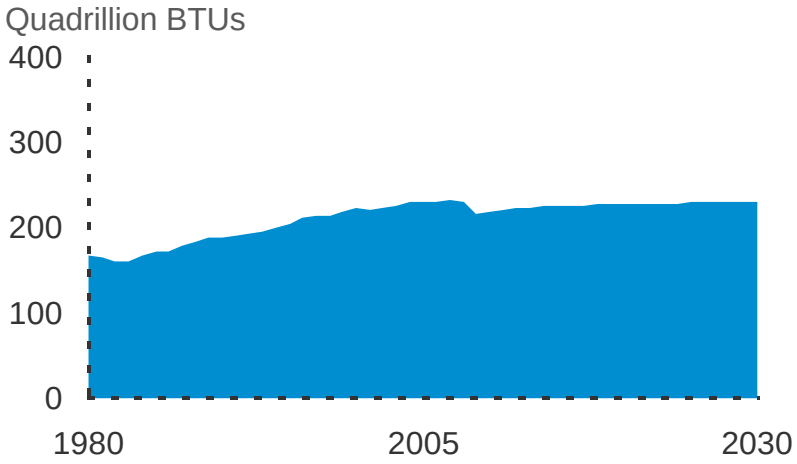
Economic Growth Drives Energy Demand

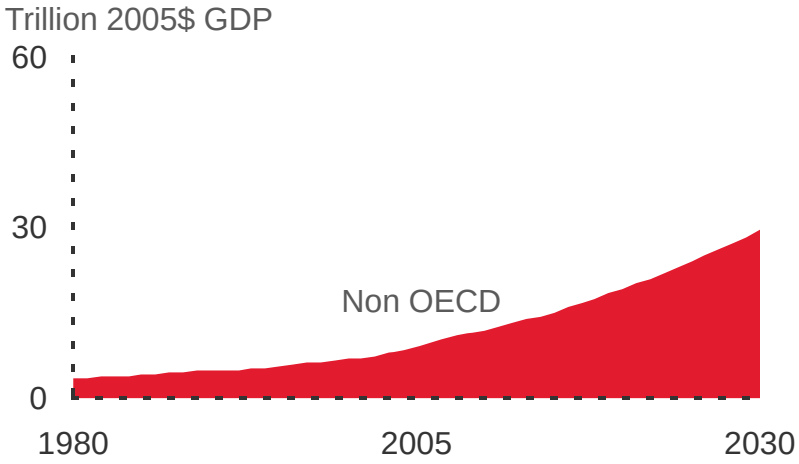


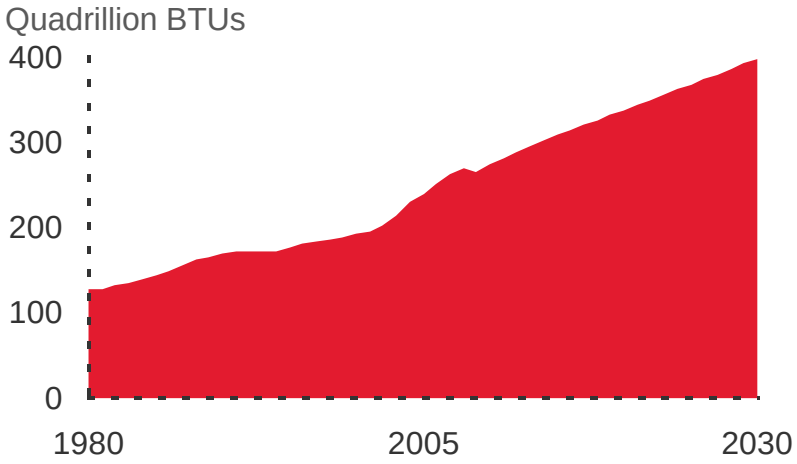
GDP



Demand







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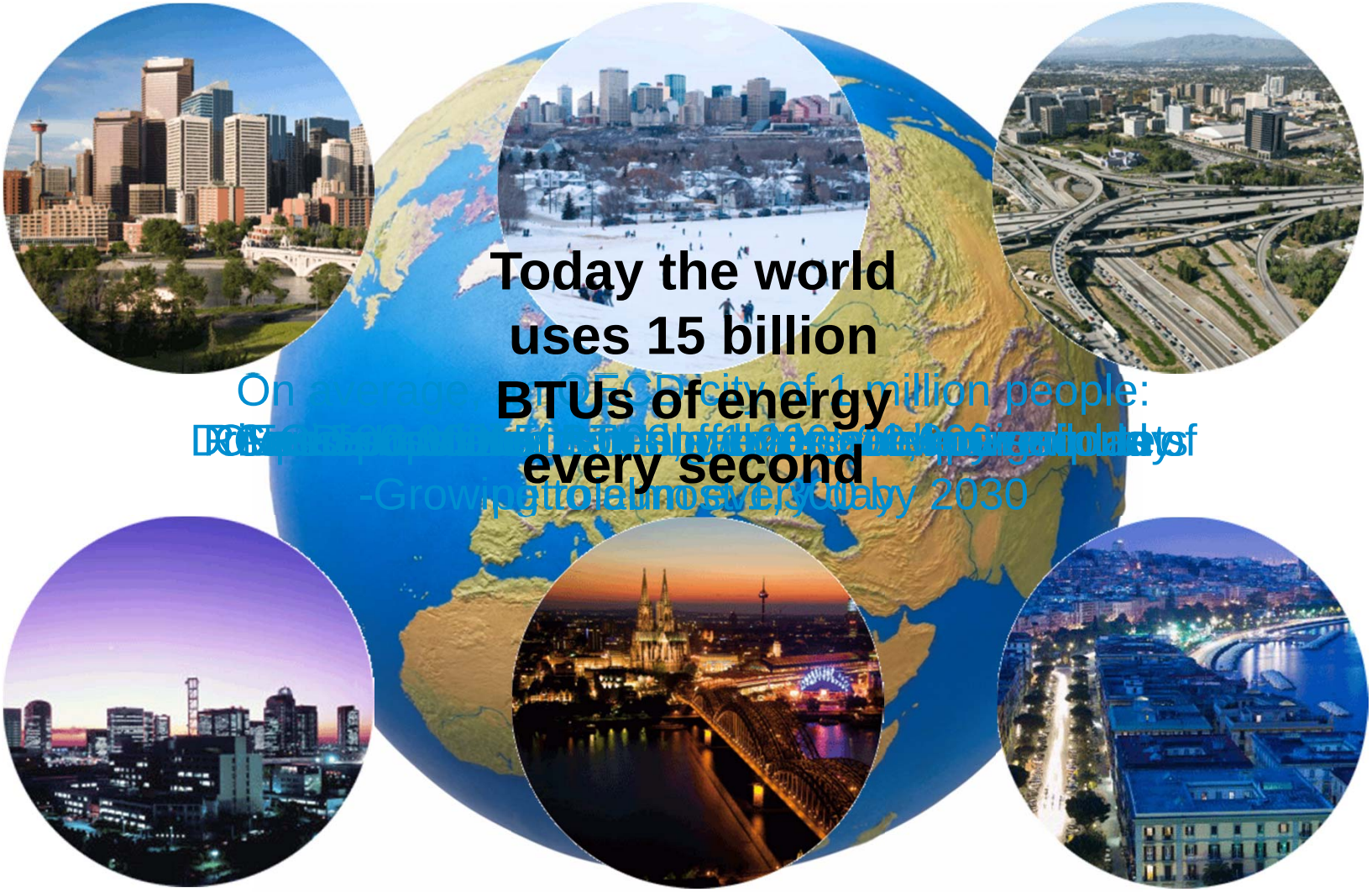
Scale of Global Energy Is Enormous



Today the world uses 15 billion BTUs of energy every second

On average, the OECD city of 1 million people:

[illegible]

-Growing total in every day 2030

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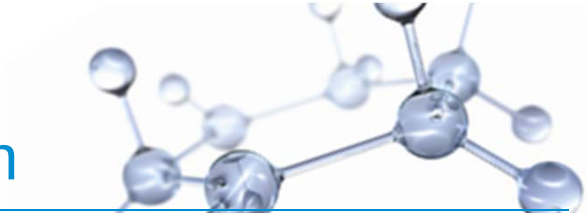
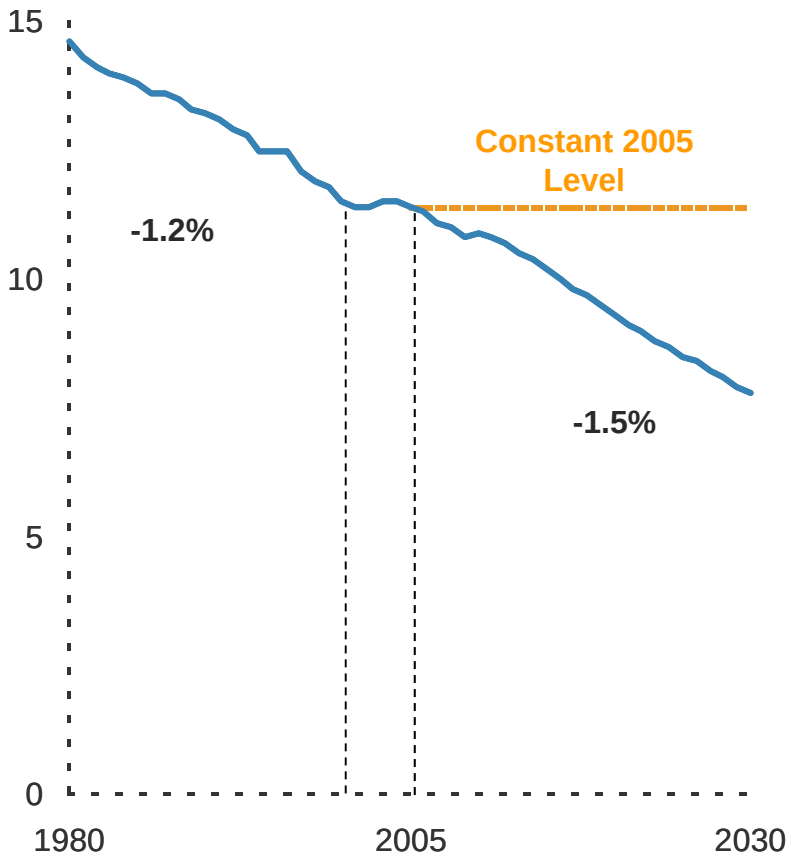
Efficiency: Reducing Demand Growth



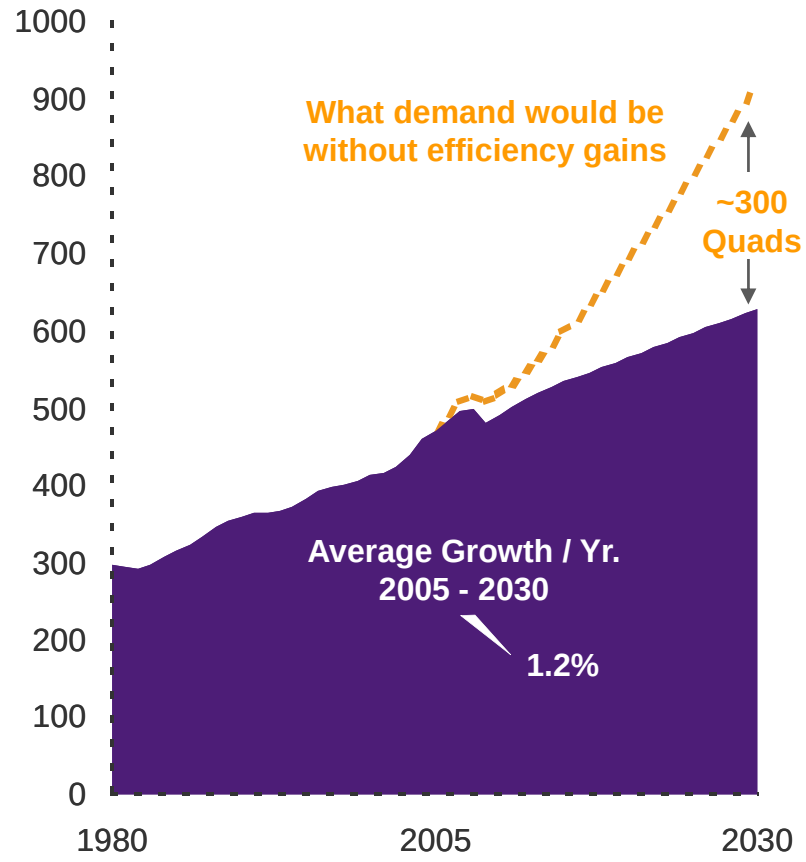
Energy per GDP

MBTU / 2005$ k GDP



Demand

Quadrillion BTUs



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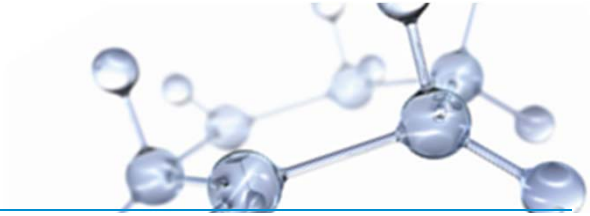
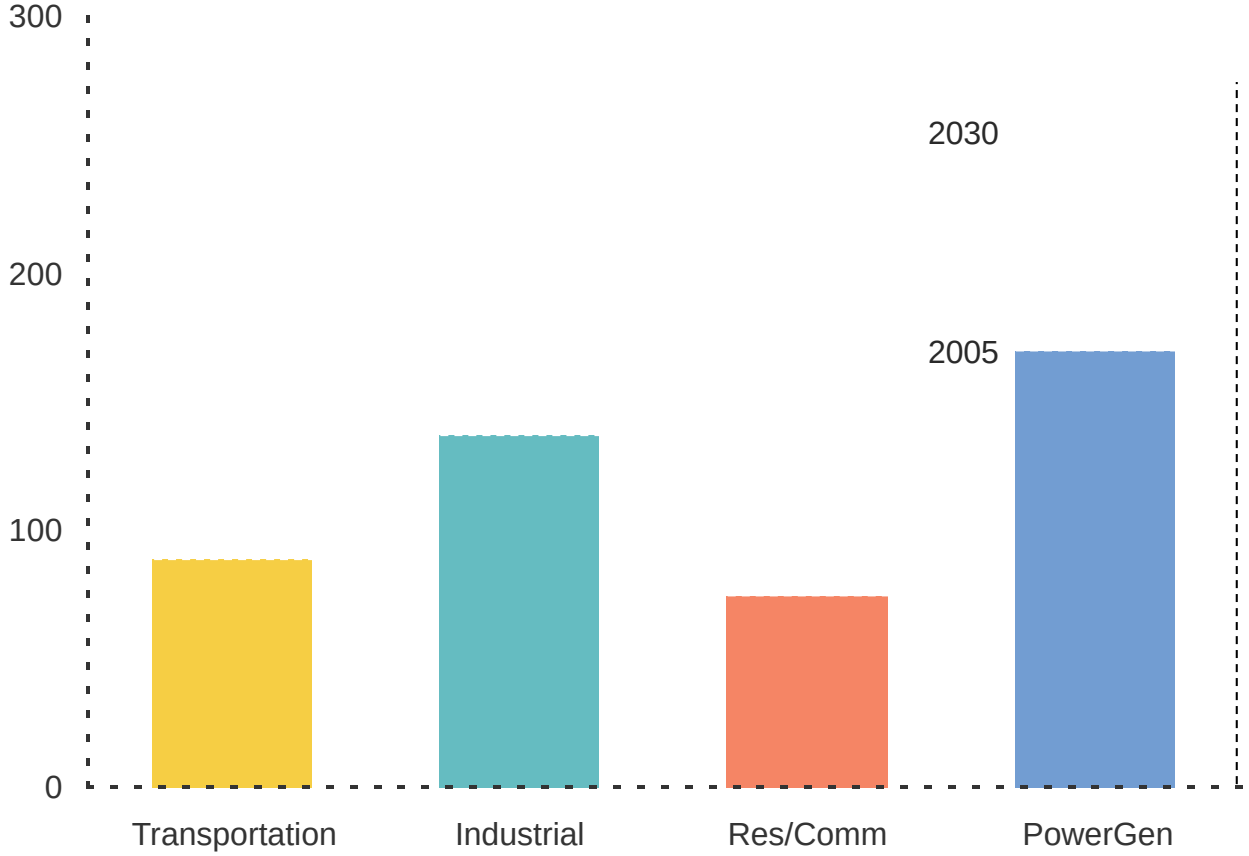
Growing Global Demand



By Sector

Quadrillion BTUs



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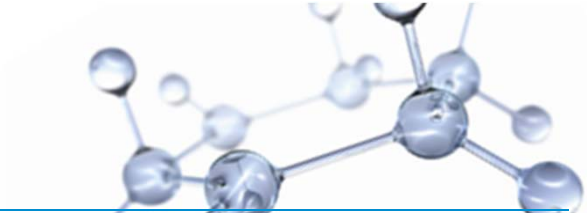
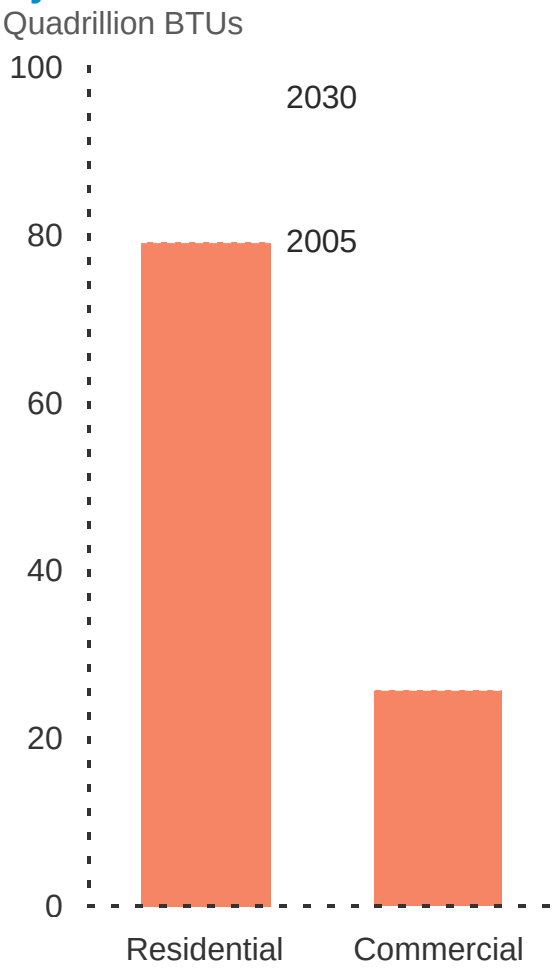
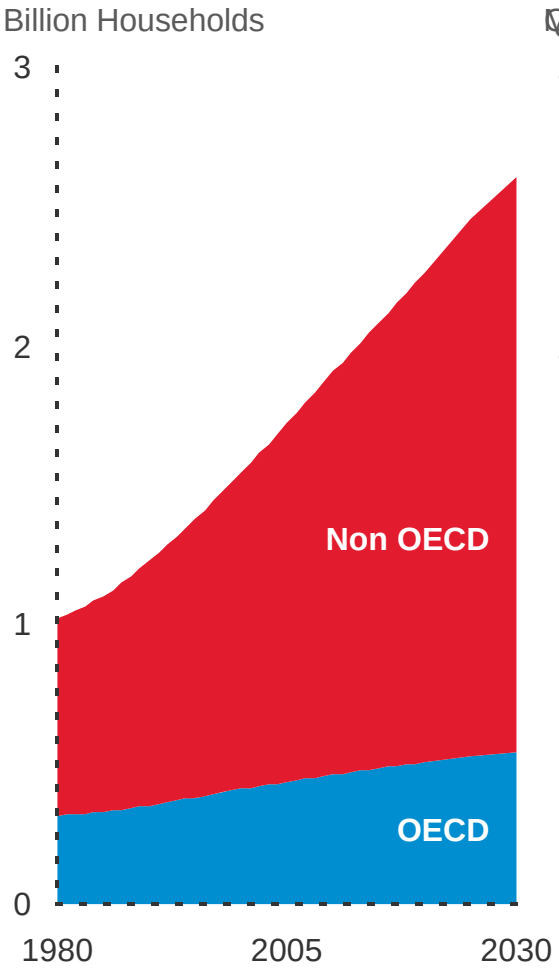
Residential / Commercial Demand



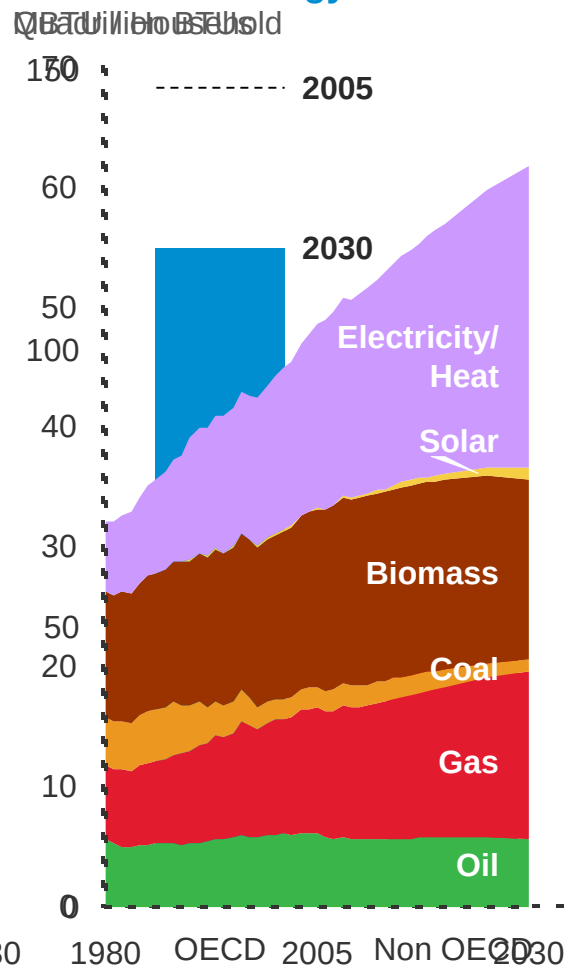
By Sector



Residential



Residential Energy Use



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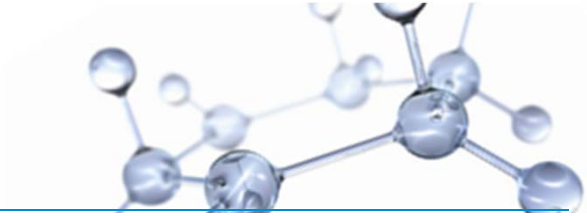
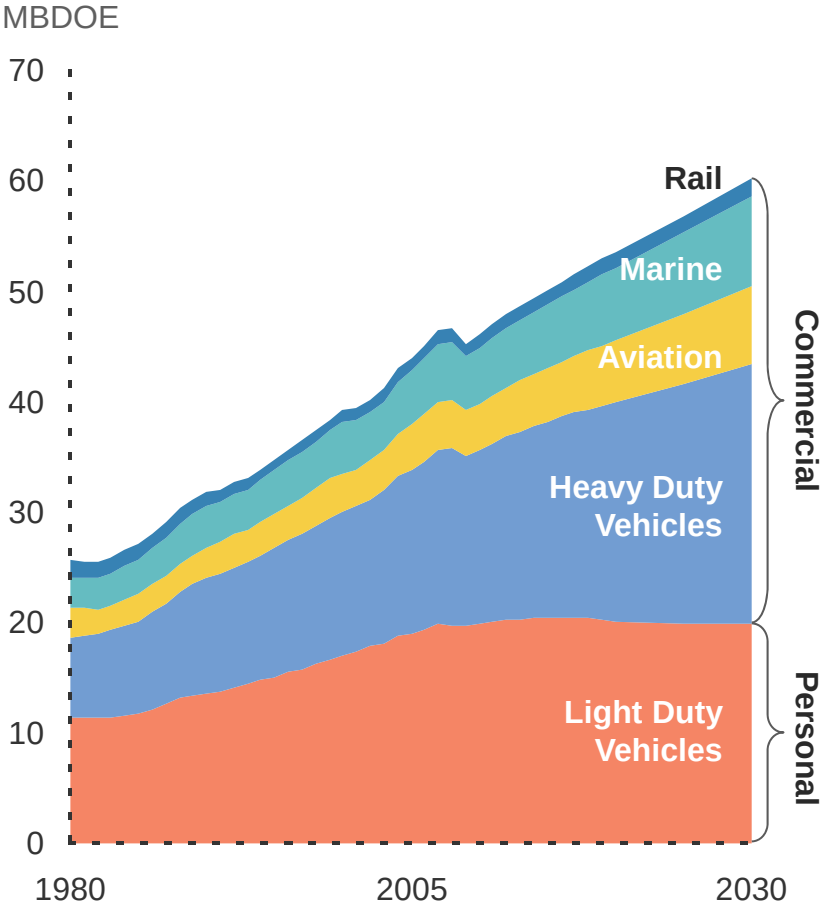
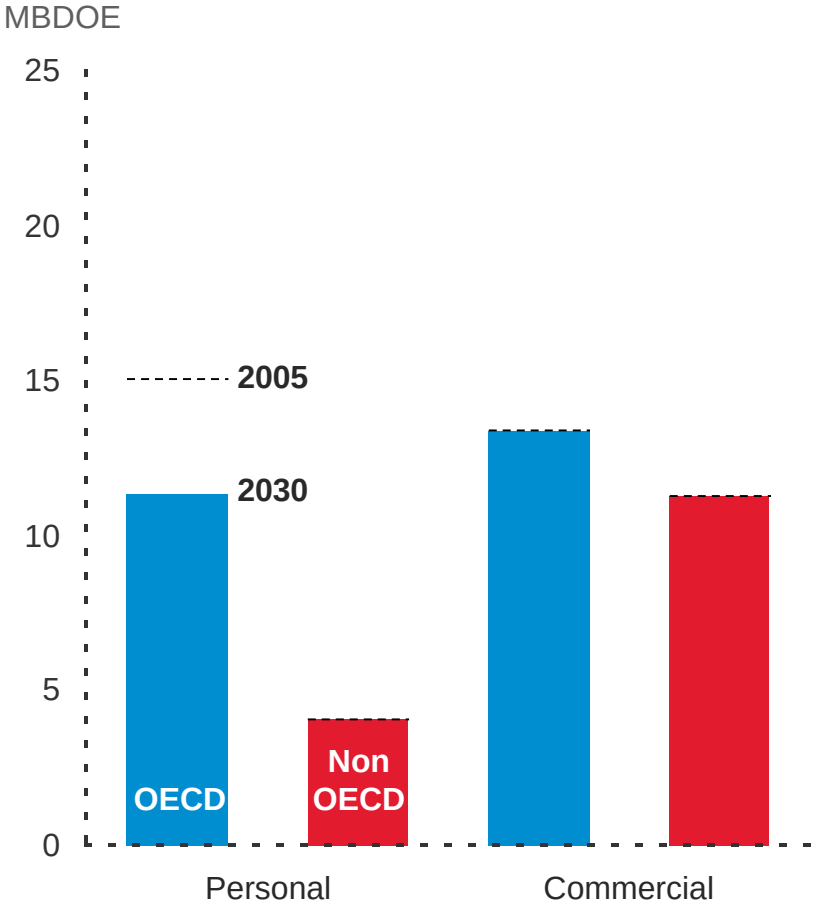
Global Transportation Demand



By Sector



Personal vs. Commercial



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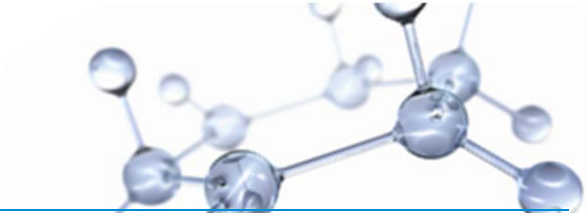
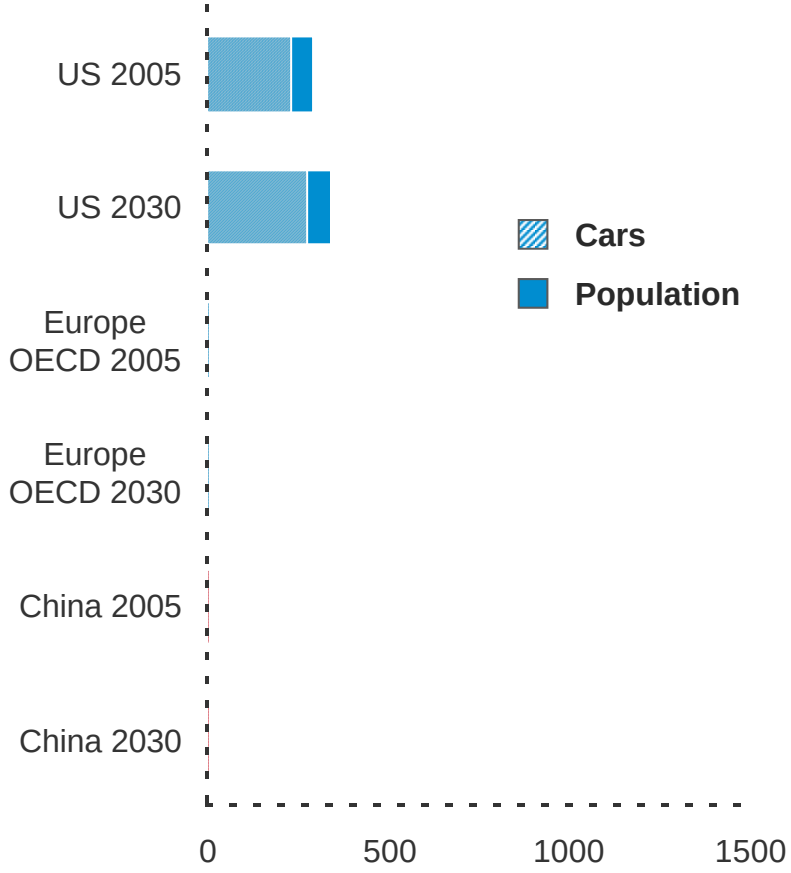
Personal Vehicle Fleet is Growing



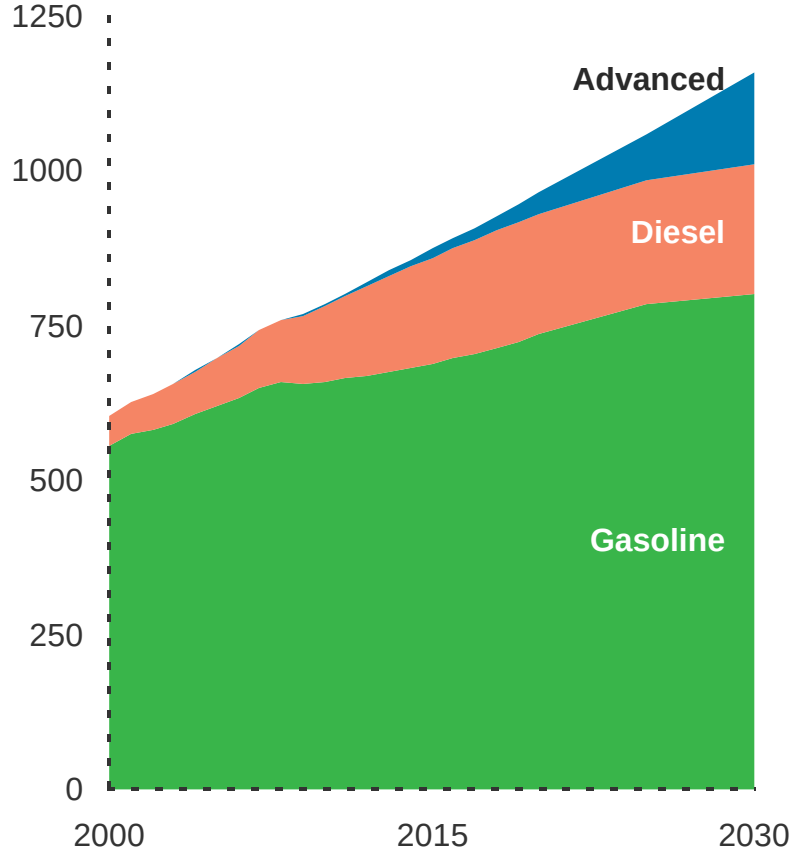
Vehicle Penetration

Cars and Population (millions)



Fleet by Car Type

Million Cars



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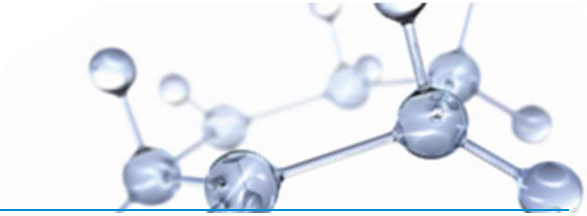
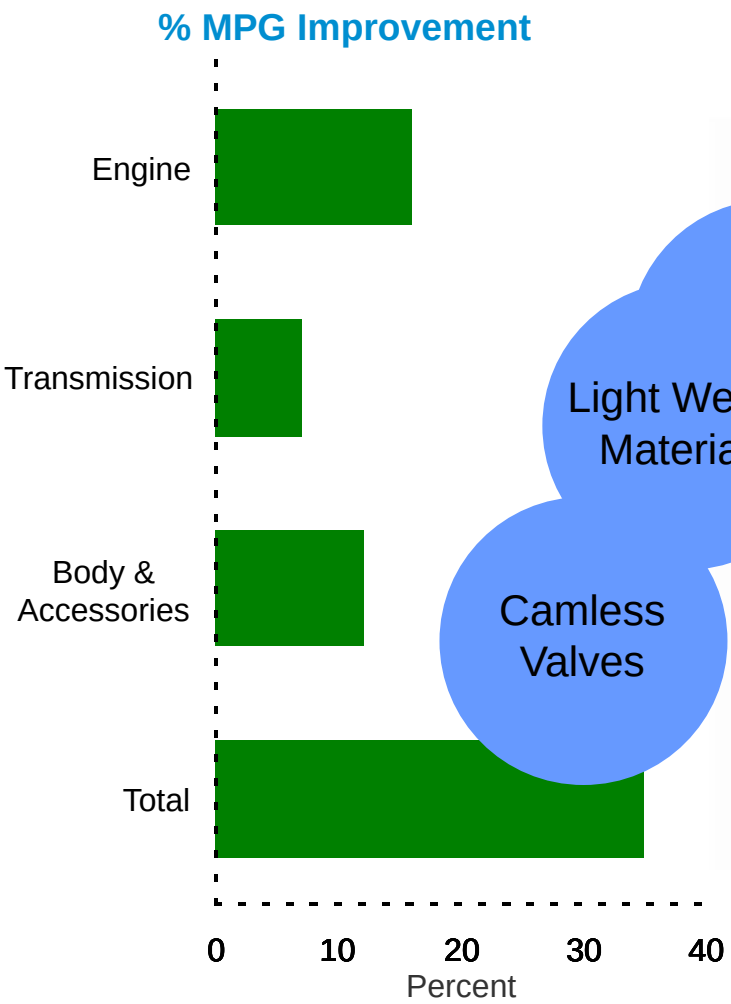
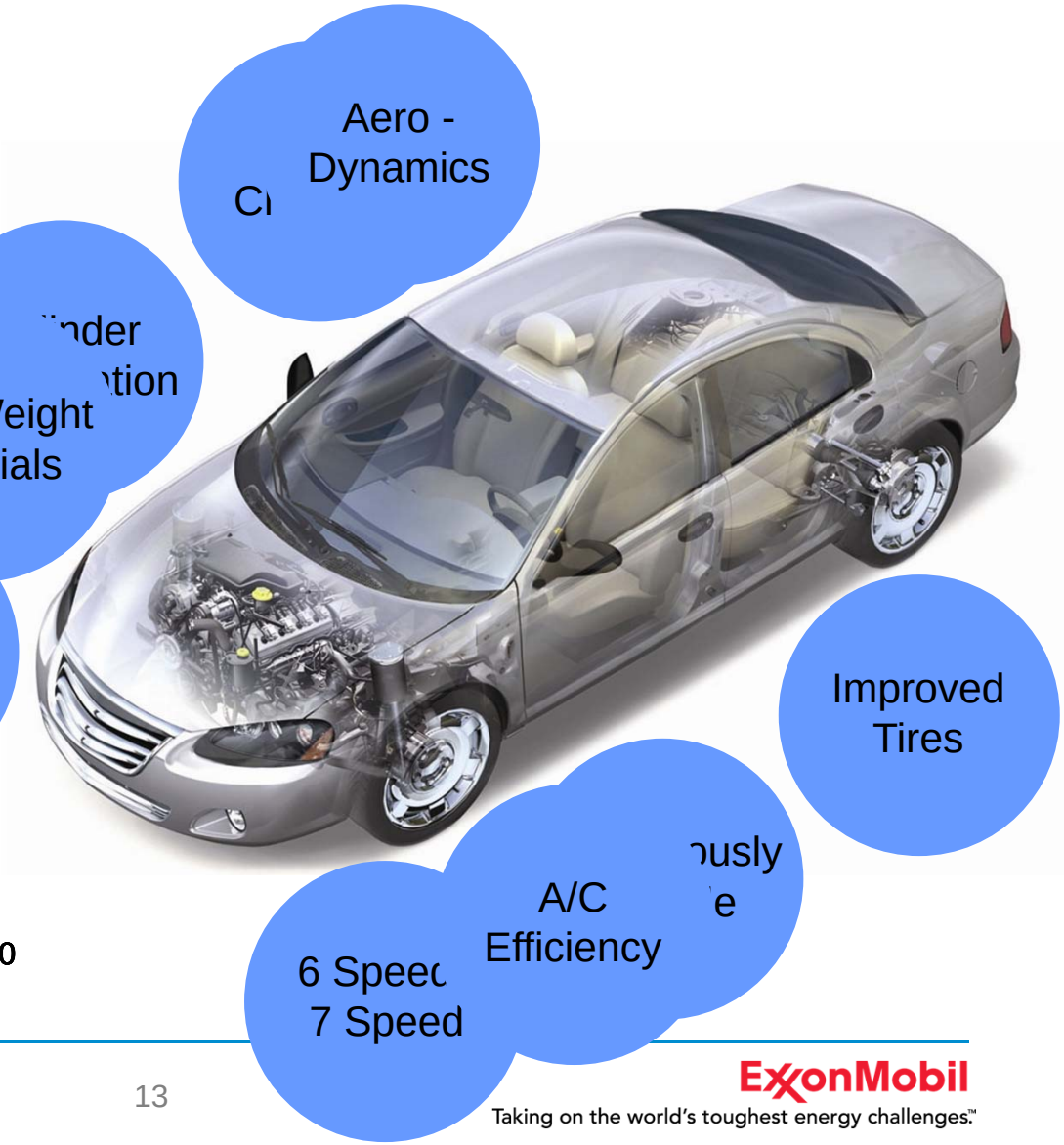
Improving Today's Vehicle







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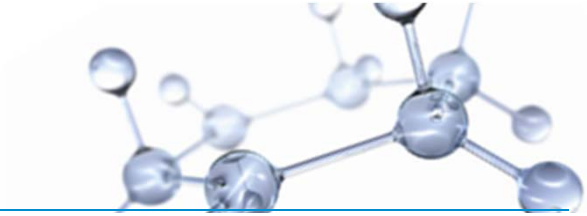
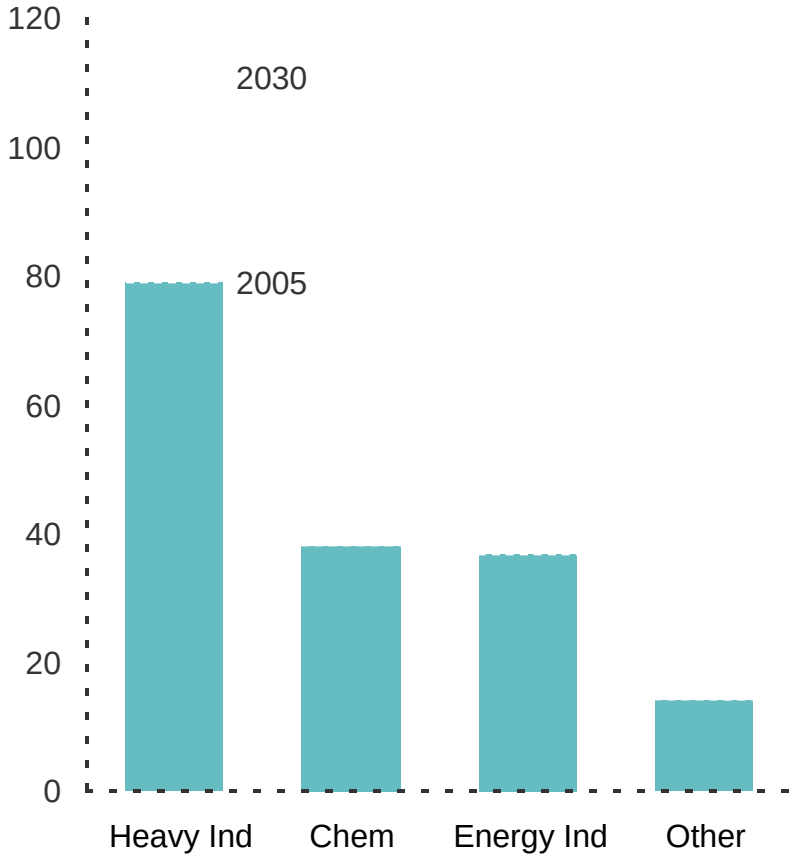
Global Industrial Demand



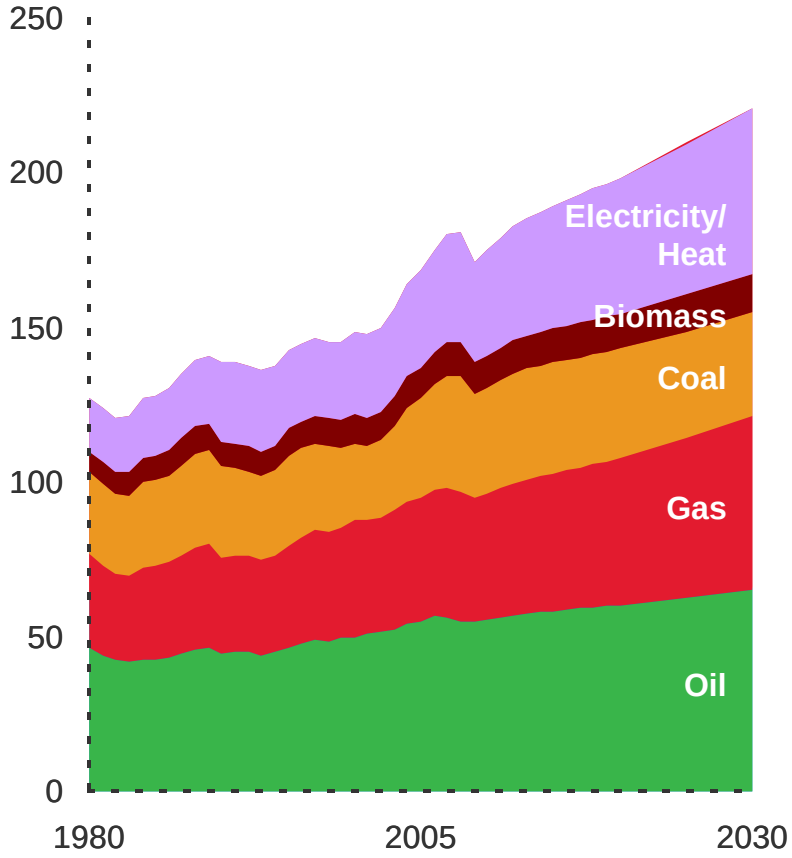
By Sector

Quadrillion BTUs



By Region

Quadrillion BTUs



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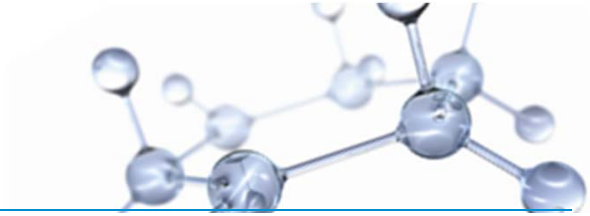
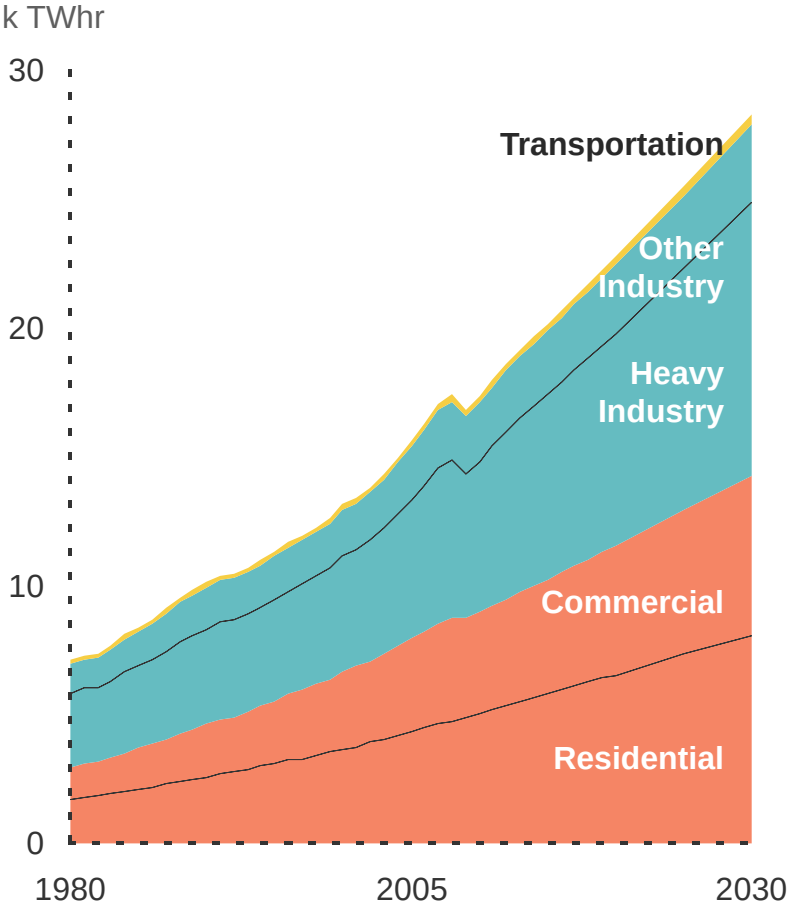
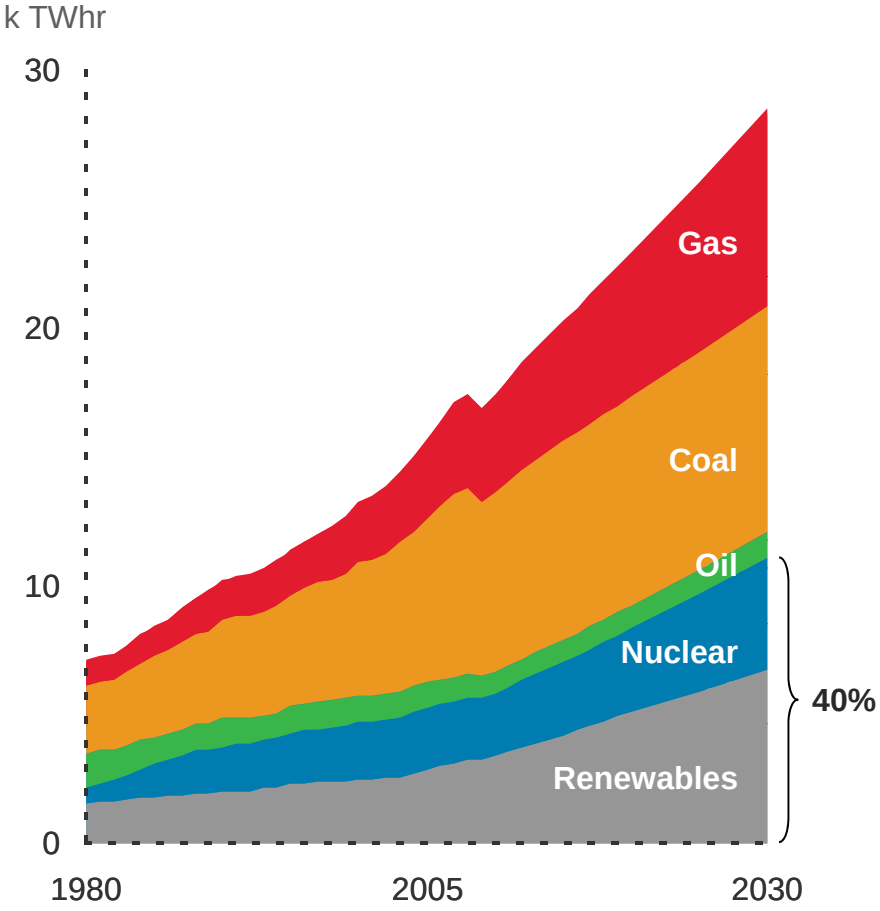
Electricity Use is Growing Fast



By Sector



By Generation



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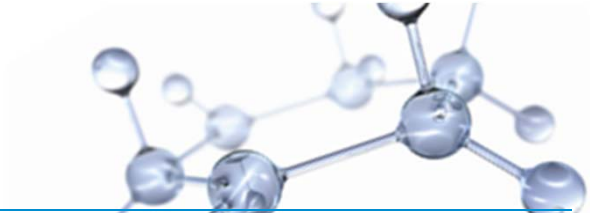
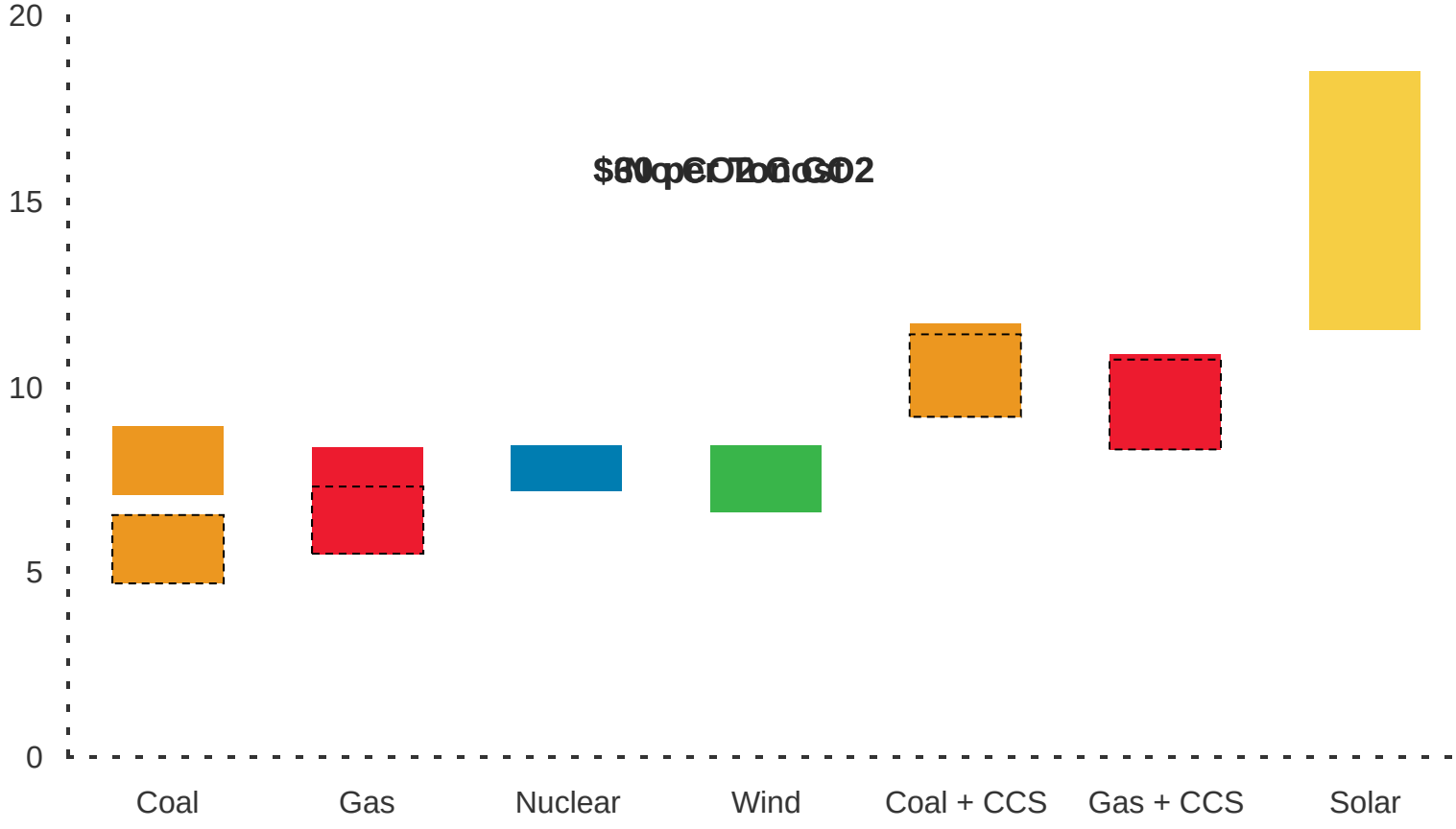
Electricity Generation Cost



US Baseload, Startup 2025

2009 Cents/kWhr



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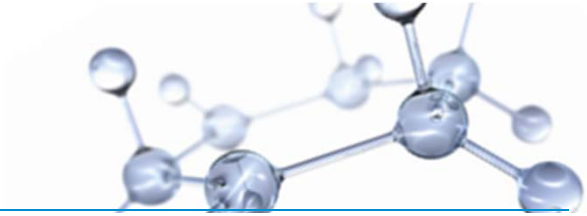
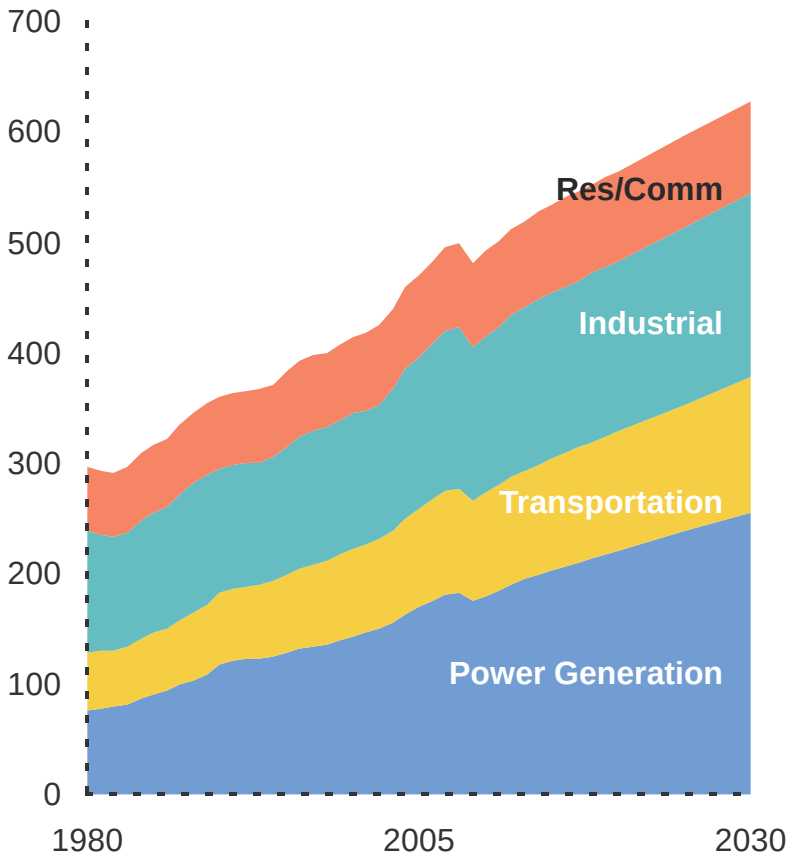
Global Energy Demand and Supply



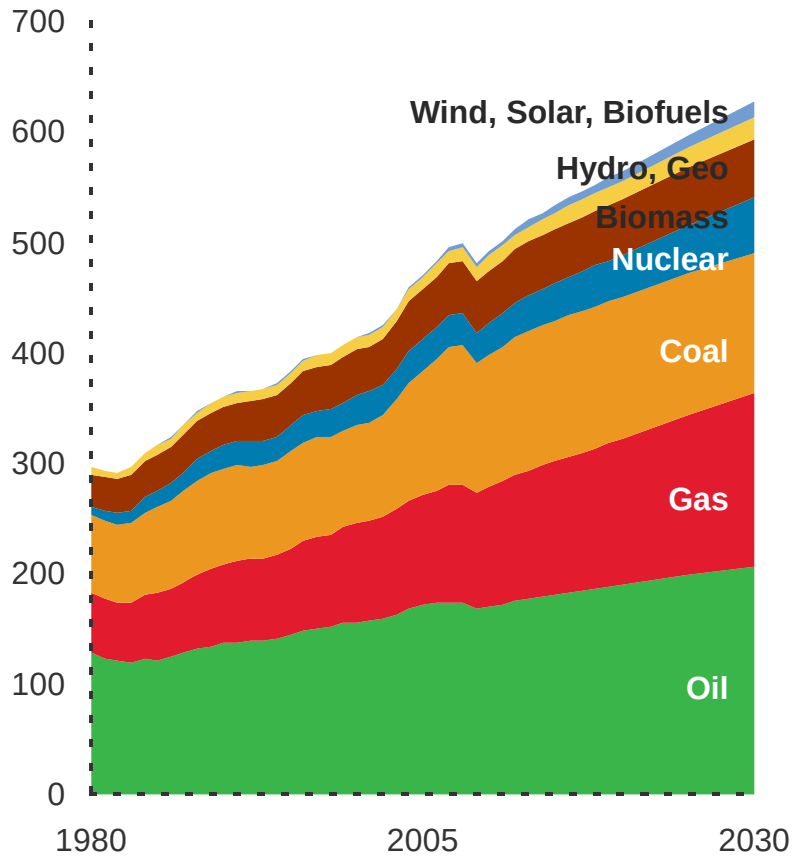
By Sector

Quadrillion BTUs



By Fuel

Quadrillion BTUs



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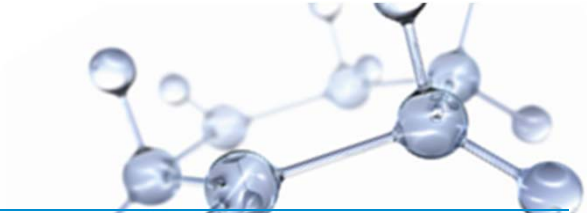
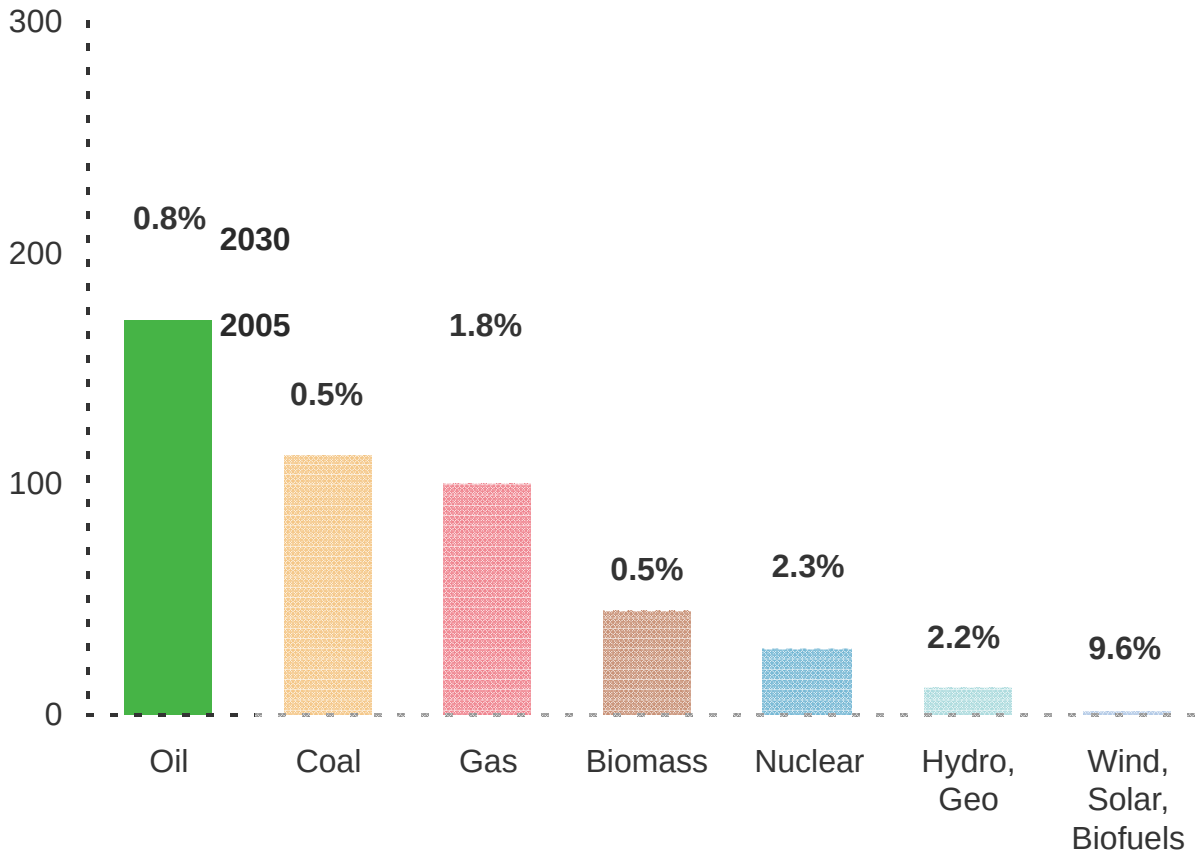
Global Energy Demand and Supply



Demand and Supply

Quadrillion BTUs

2005 – 2030



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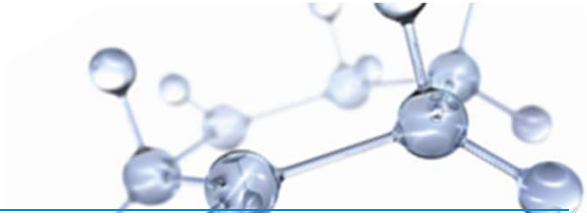
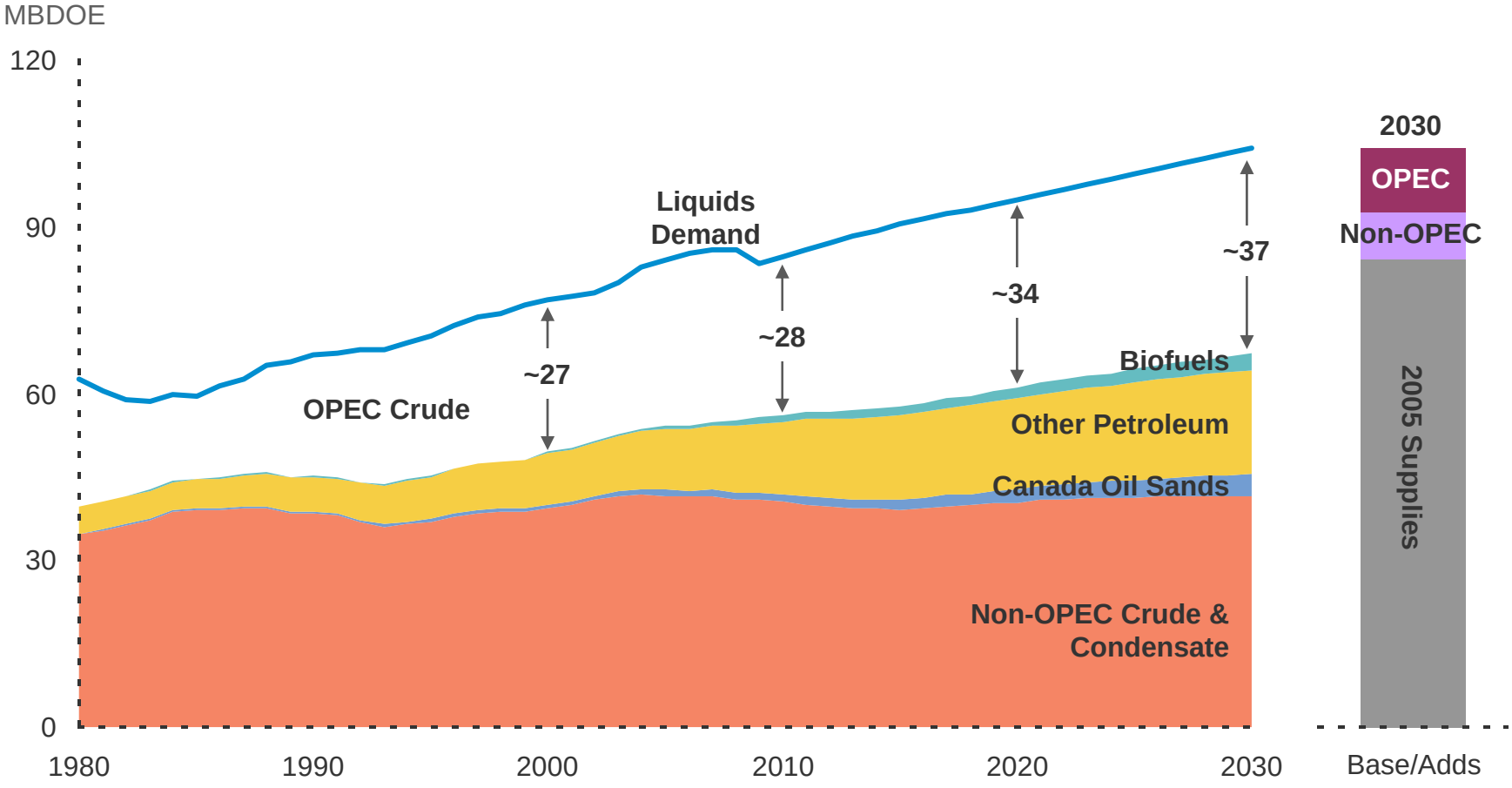
Global Liquids Supply Grows



Global Liquids Supply and Demand



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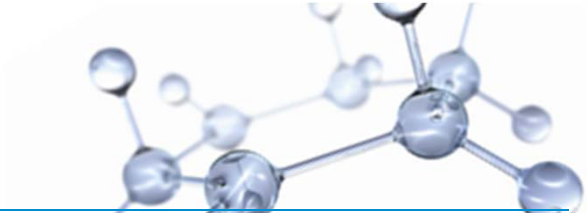
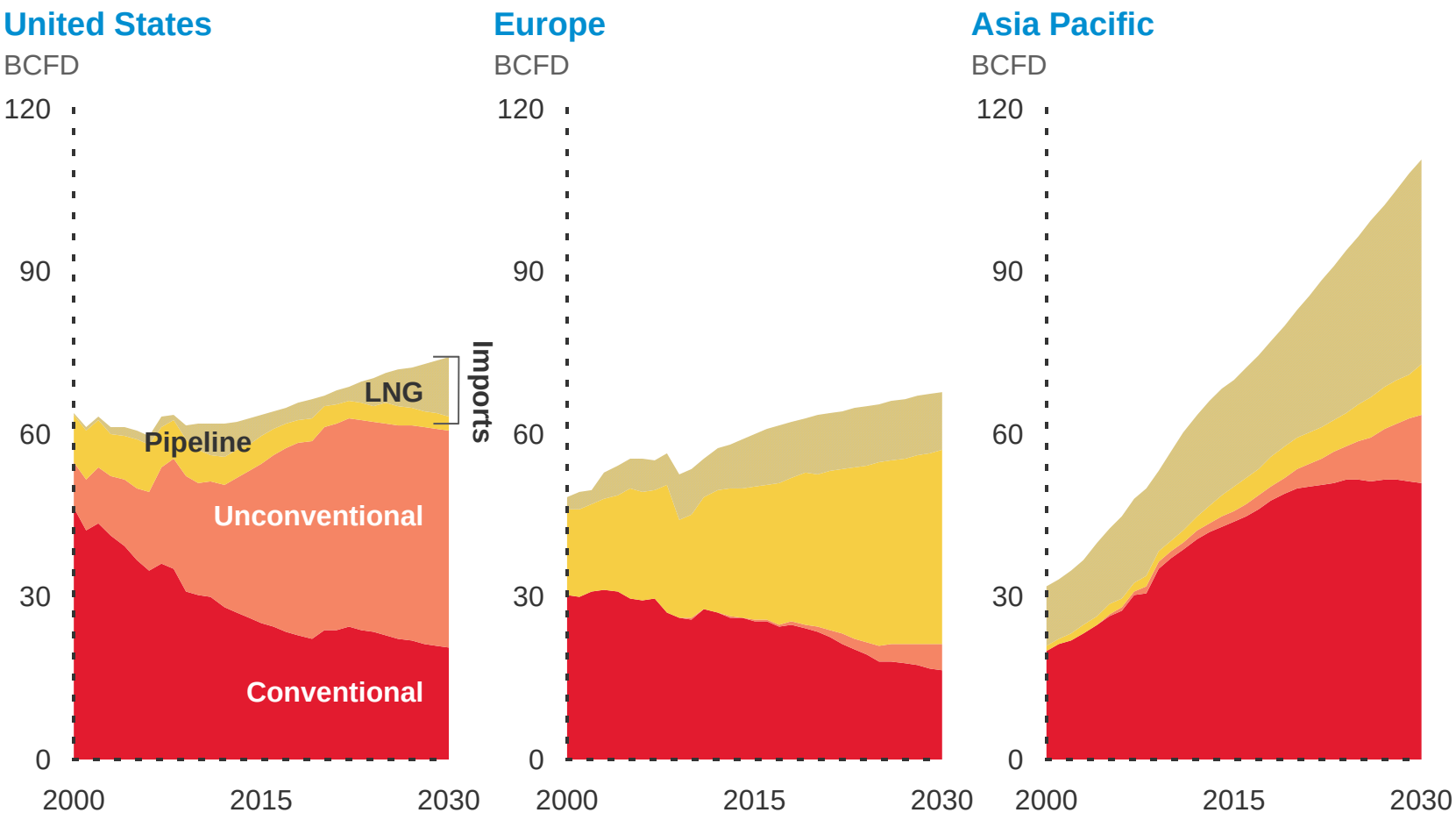
Gas Supply and Demand Balance





LNG: Liquefied Natural Gas

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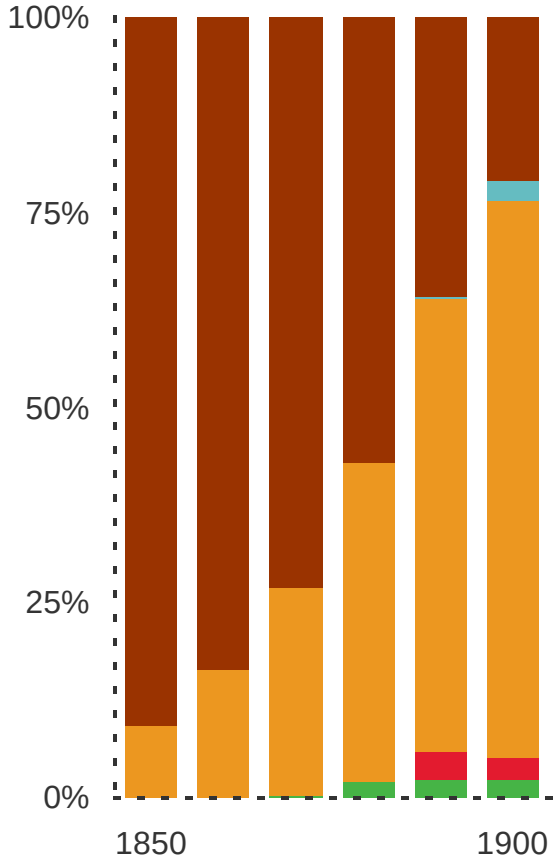
Transition to Modern Energy / Technology

US Energy Demand

Percent



Canals
Personal Vehicles
Passenger Flights
Hybrid Vehicle
Railways & Steamships
Rail Freight
Road Freight
Deepwater & Arctic
Coal Mining
Electrification
Air Conditioni
Shale Gas & Oil Sands
Wood & Coal Heating
Oil Prod & Refining
Natural Gas in Homes
Wind
Telegraph
Telephone
Nuclear Power
Cell Phones & PCs

Wood Coal Hydro Oil Gas Nuclear Renewables

Energy Information Agency

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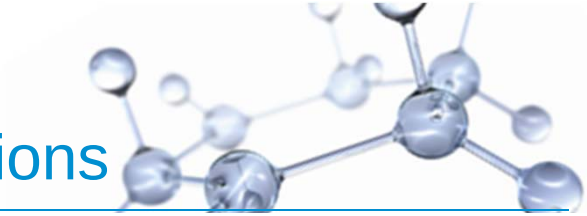
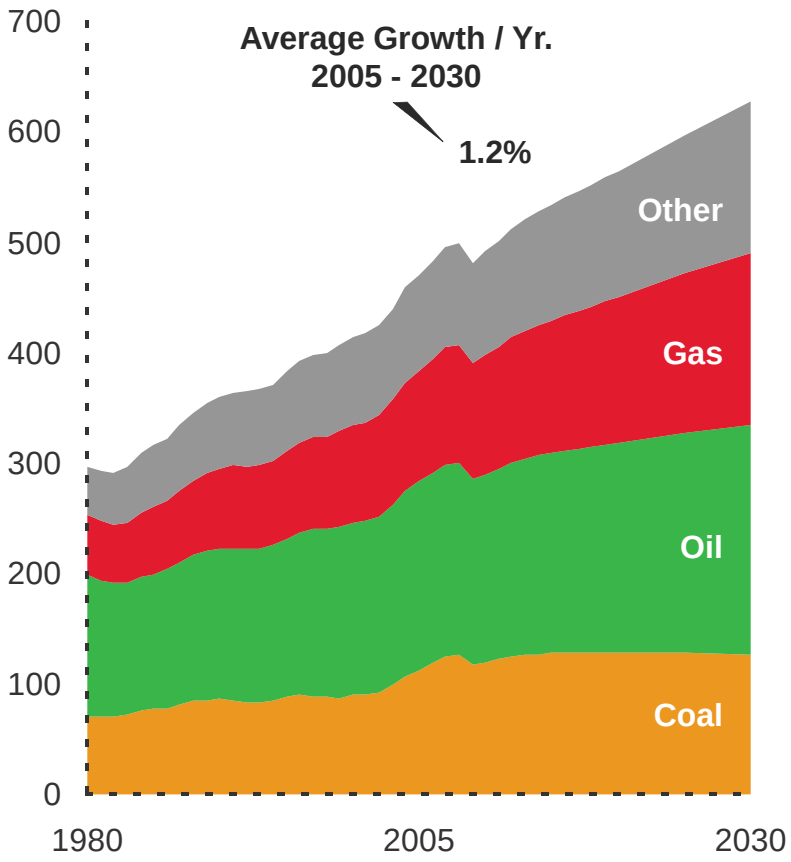
Global Energy Demand & CO_2 Emissions



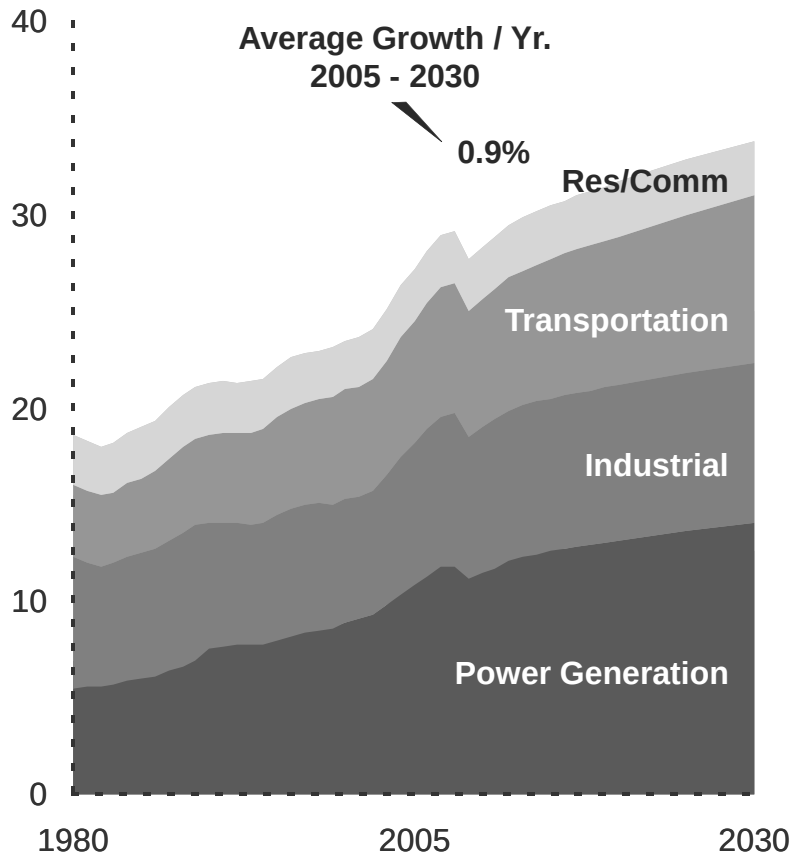
Demand

Quadrillion BTUs



CO_2 Emissions

Billion Tons



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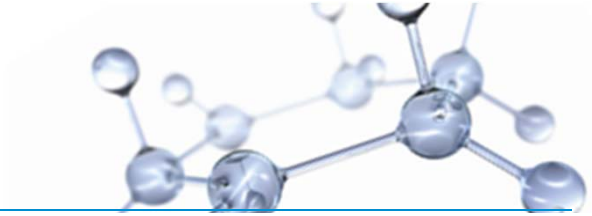
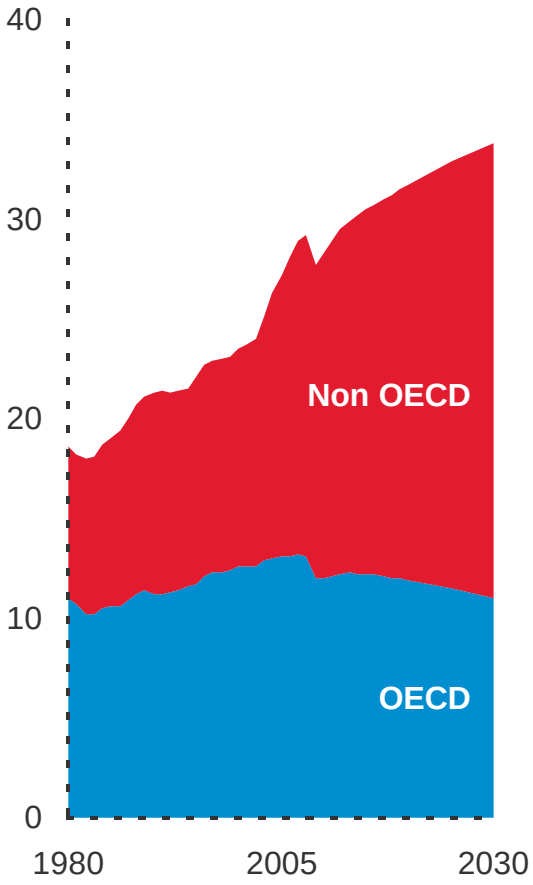
CO_2 Emissions



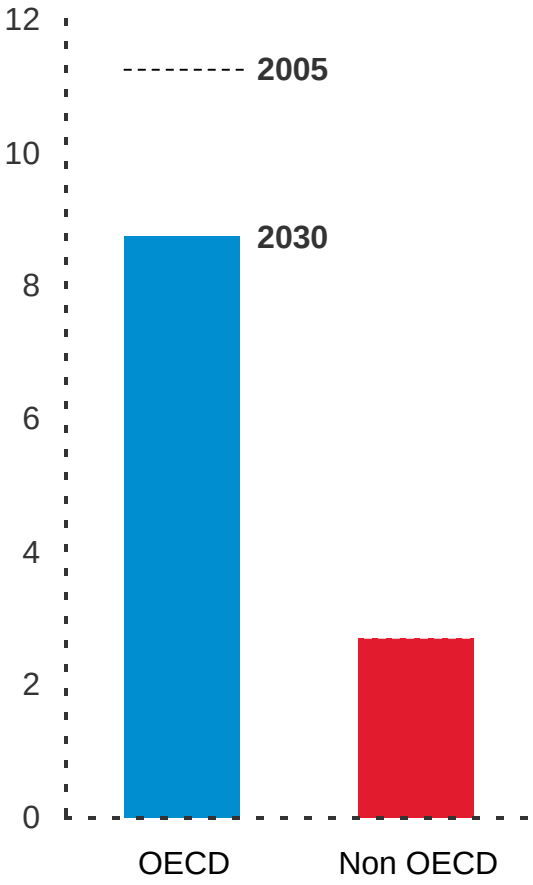
CO_2 Emissions

Billion Tons



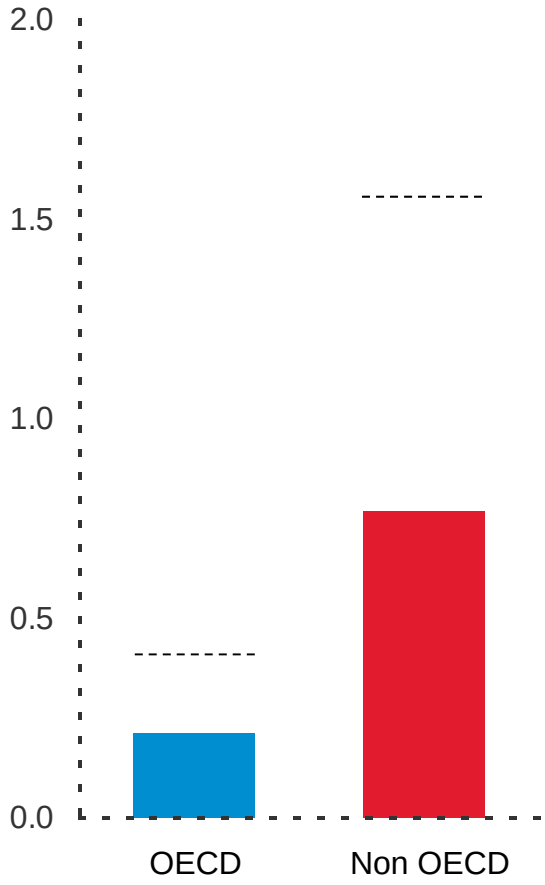
Emissions per Capita

Tons / Person



Emissions per GDP

Tons / 2005$ k GDP



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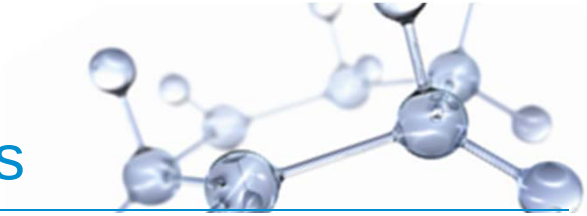
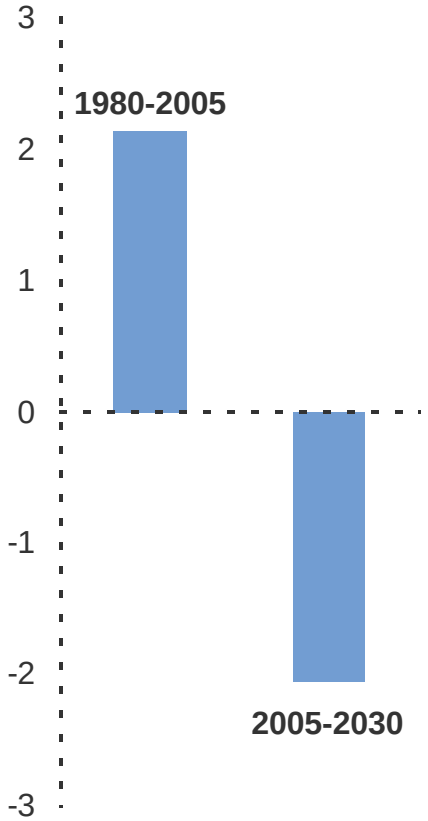
OECD Transitions to Lower Emissions



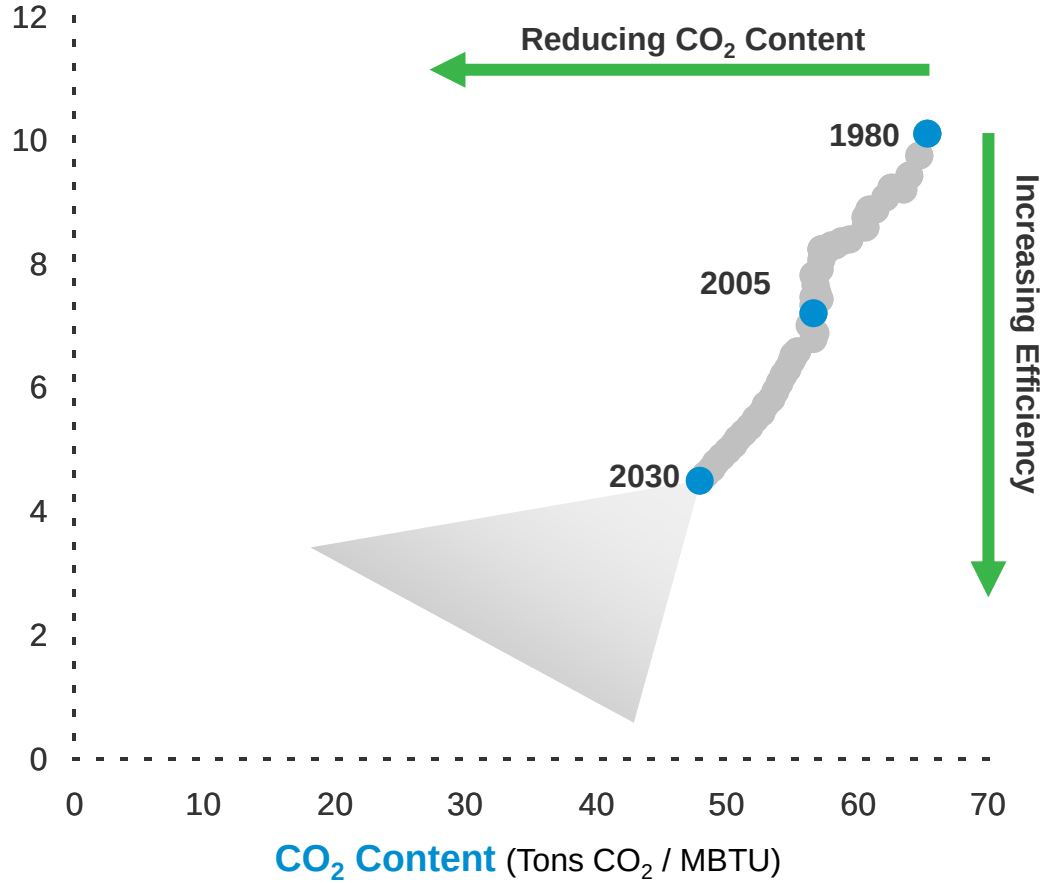
Change in CO_2 Emissions

Billion Tons



Energy per GDP

MBTU / 2005$ k GDP



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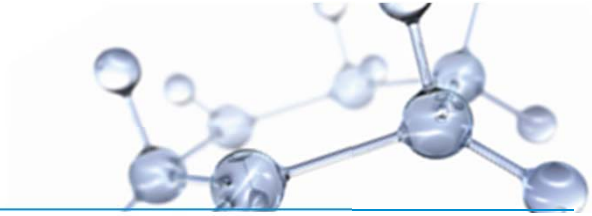
Integrated Energy Solutions



Now

- 6.7 billion people
- Global economic linkages
- Disparate living stand
- Enormous energy r
- Environmental gai
- Growing technology

2030

on people
OECD leads economic growth
living standards improve
eeds up one-third
ironmental goals
ances in technology

Mitigate Emissions

Increase Efficiency

Expand Supply

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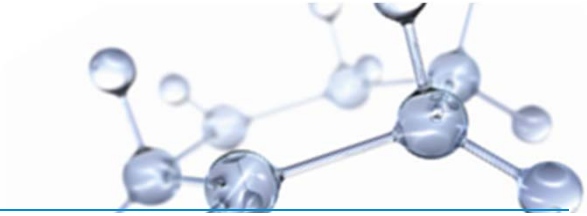

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