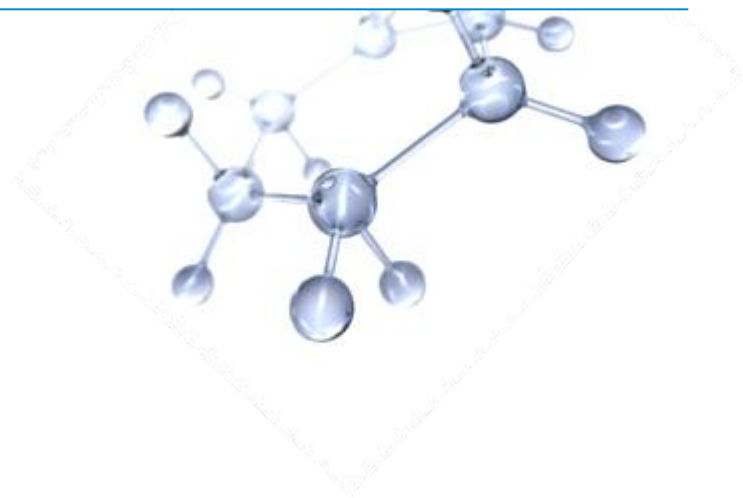




Taking on the world's toughest energy challenges.™

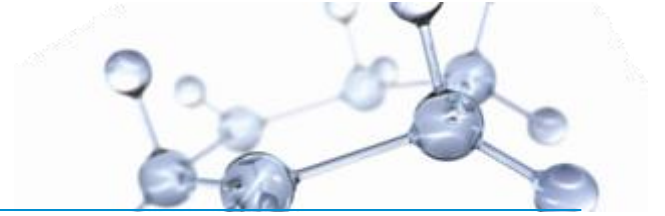
The Outlook for Energy a view to 2030

Rob Gardner
International Energy Forum
15 May 2010

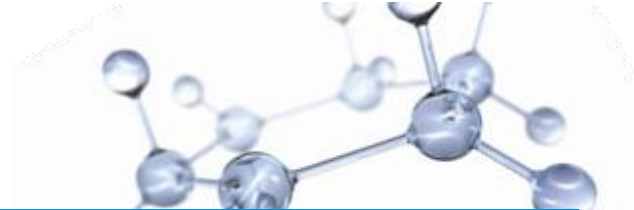


This presentation includes forward-looking statements. Actual future conditions (including economic conditions, energy demand, and energy supply) could differ materially due to changes in technology, the development of new supply sources, political events, demographic changes, and other factors discussed 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.

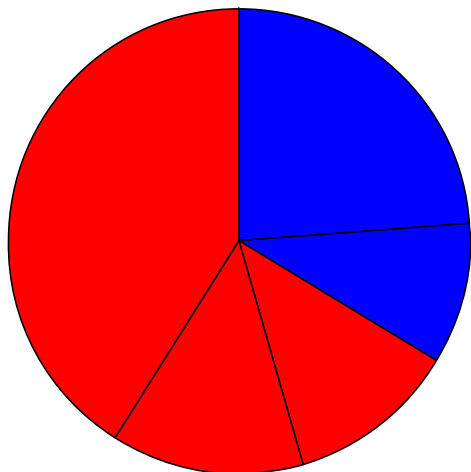
Importance of Energy



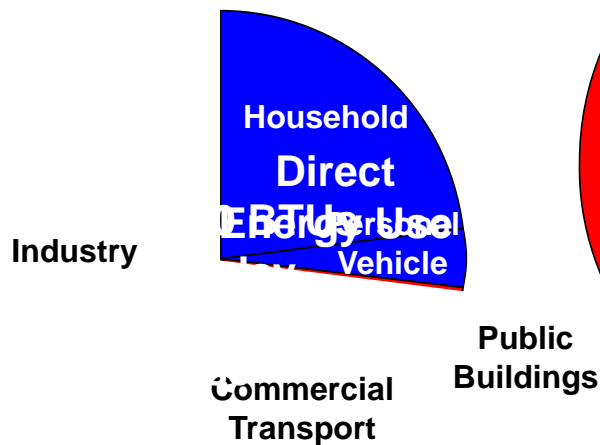
Your Energy Use



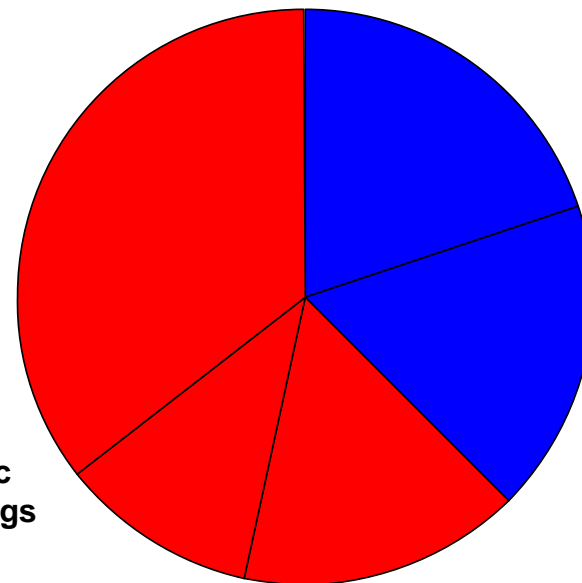
EU



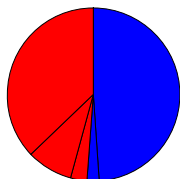
MENA



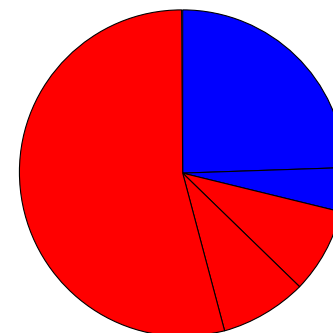
North America



Sub-Saharan Africa



Asia Pacific



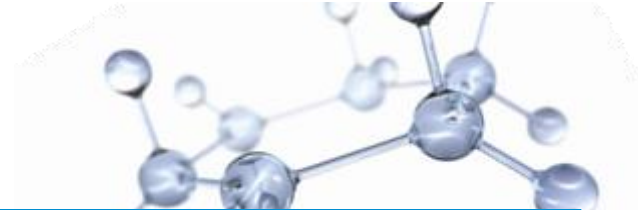
Our Key Energy Challenges



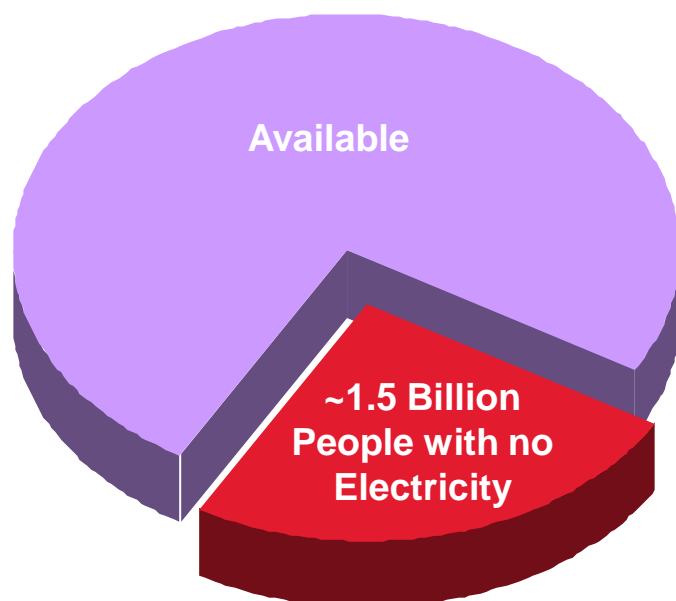
- Reducing poverty and improving living standards
 - Supporting economic growth
 - Minimizing impacts on the environment
 - Maintaining energy security
- Development of reliable and affordable energy sources and efficiency gains – are essential



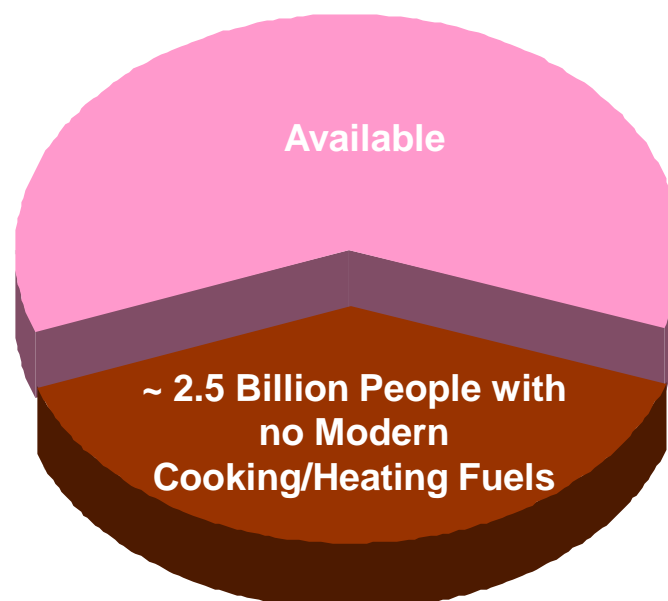
Challenge: Meeting Basic Needs



Electricity



Modern Cooking/Heating Fuels

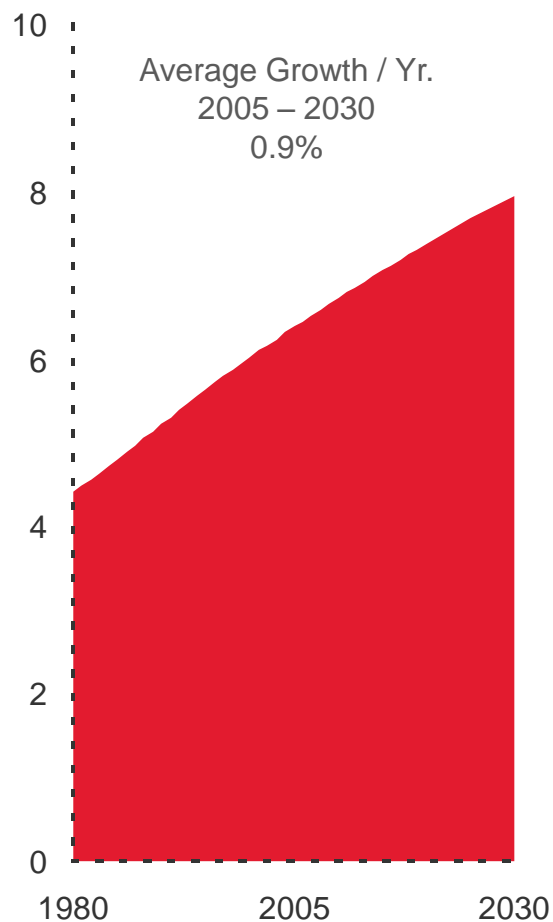


Global Economics and Energy



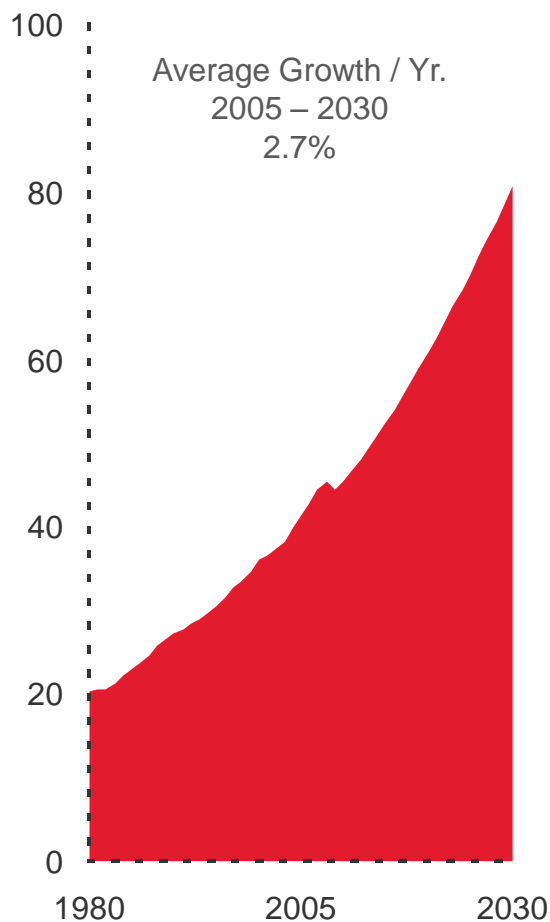
Population

Billion



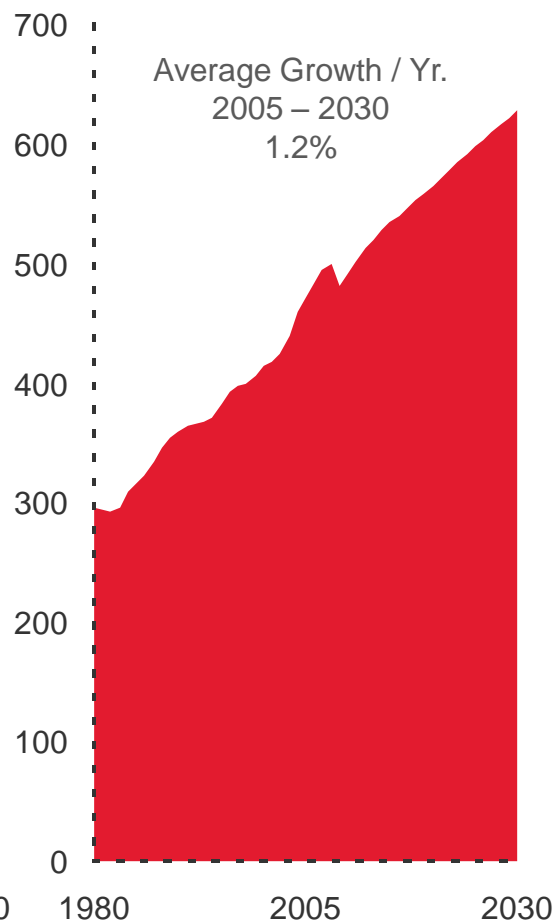
GDP

Trillion 2005\$



Energy Demand

Quadrillion BTUs



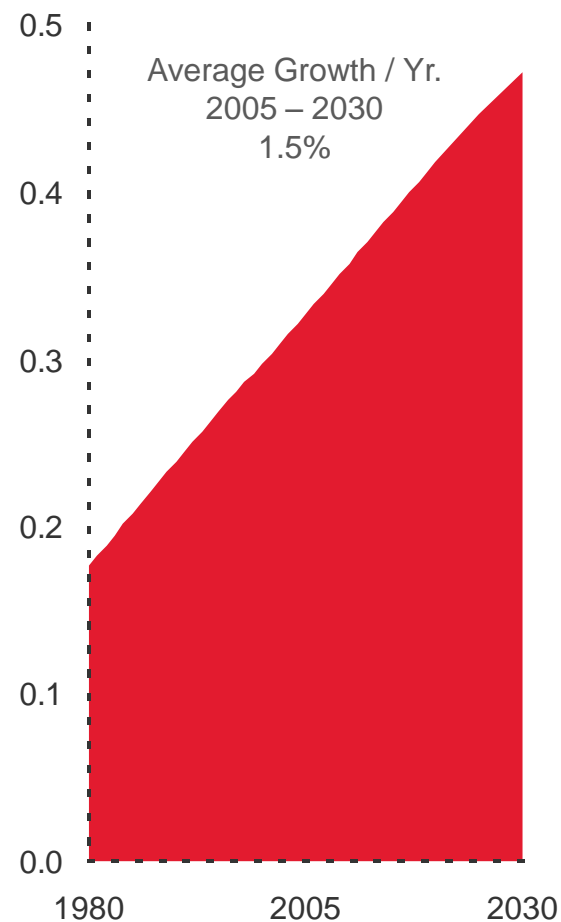
1 MBDOE = ~2 Quadrillion BTUs

MENA Economics and Energy



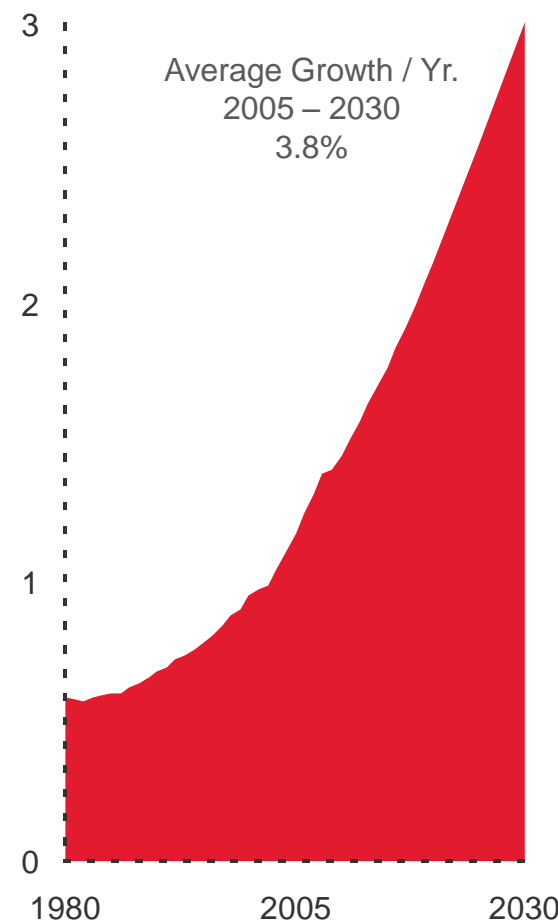
Population

Billion



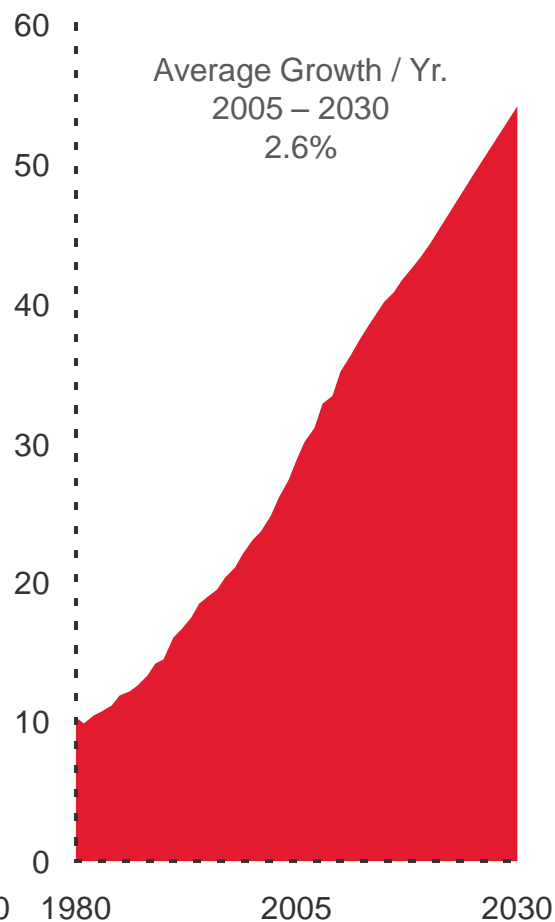
GDP

Trillion 2005\$



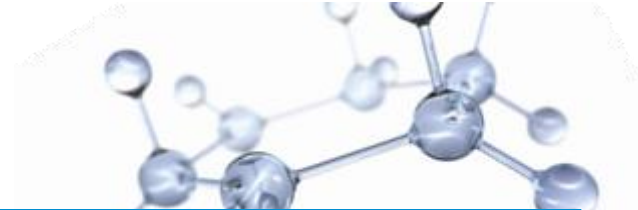
Energy Demand

Quadrillion BTUs



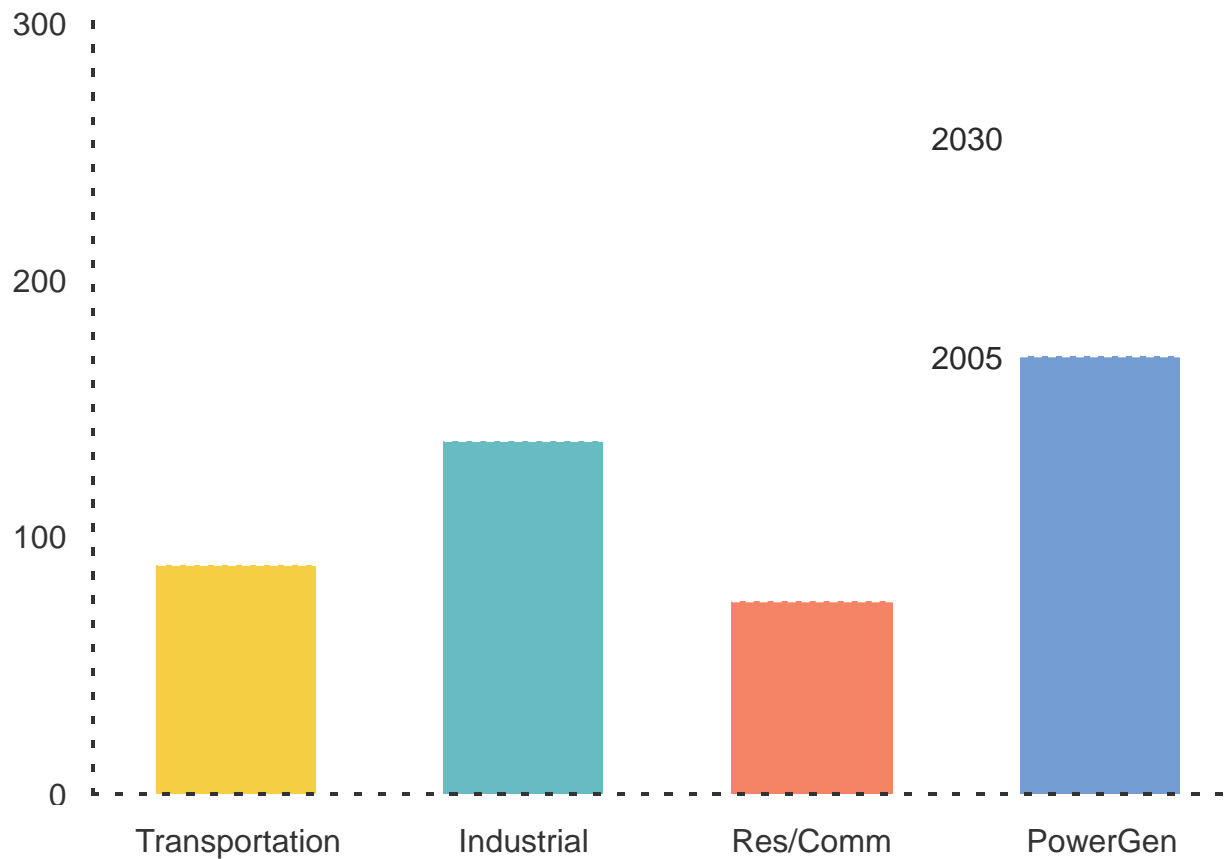
1 MBDOE = ~2 Quadrillion BTUs

Growing Global Demand



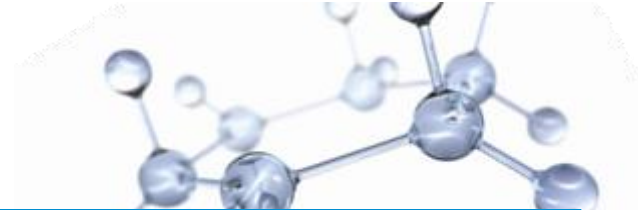
By Sector

Quadrillion BTUs



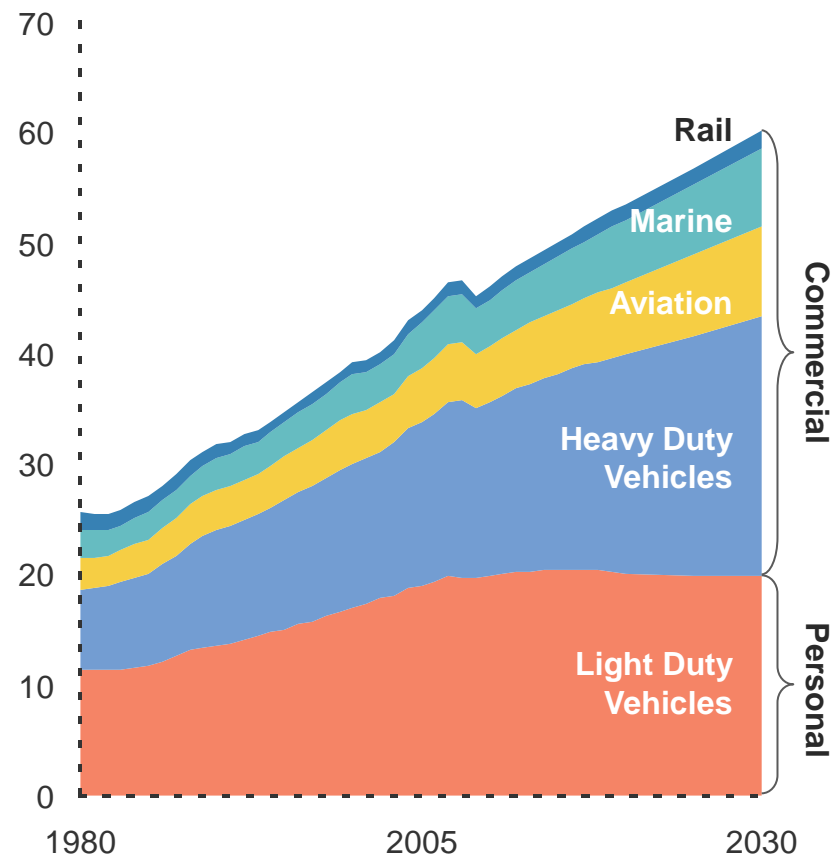
1 MBDOE = ~2 Quadrillion BTUs

Global Transportation Demand



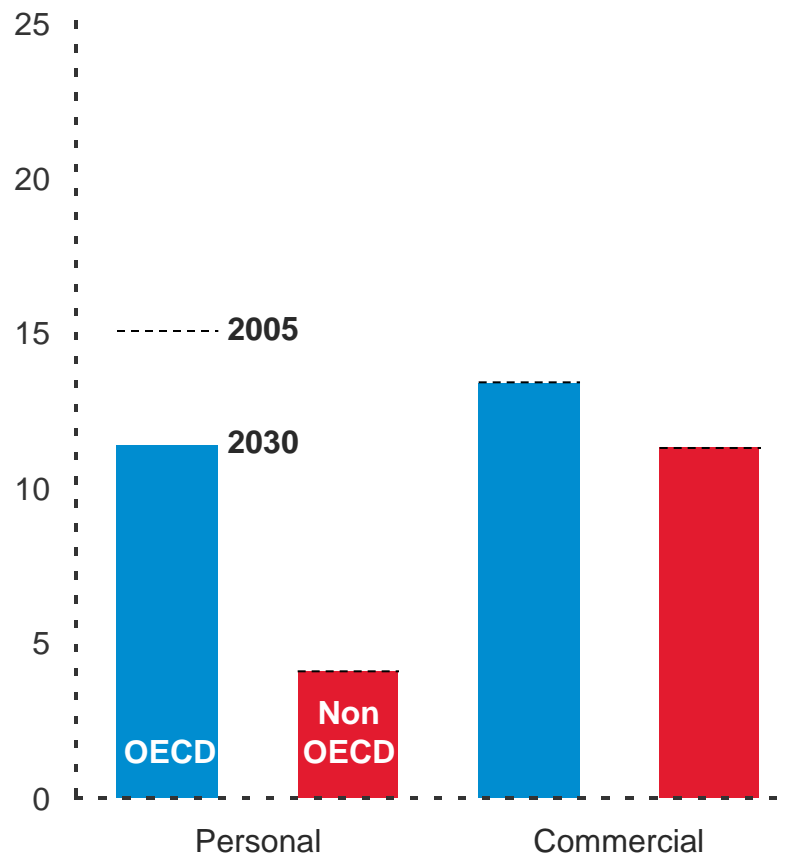
By Sector

MBDOE

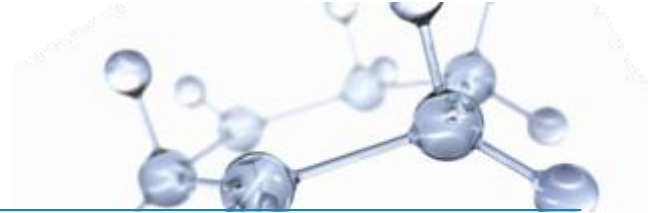


Personal vs. Commercial

MBDOE

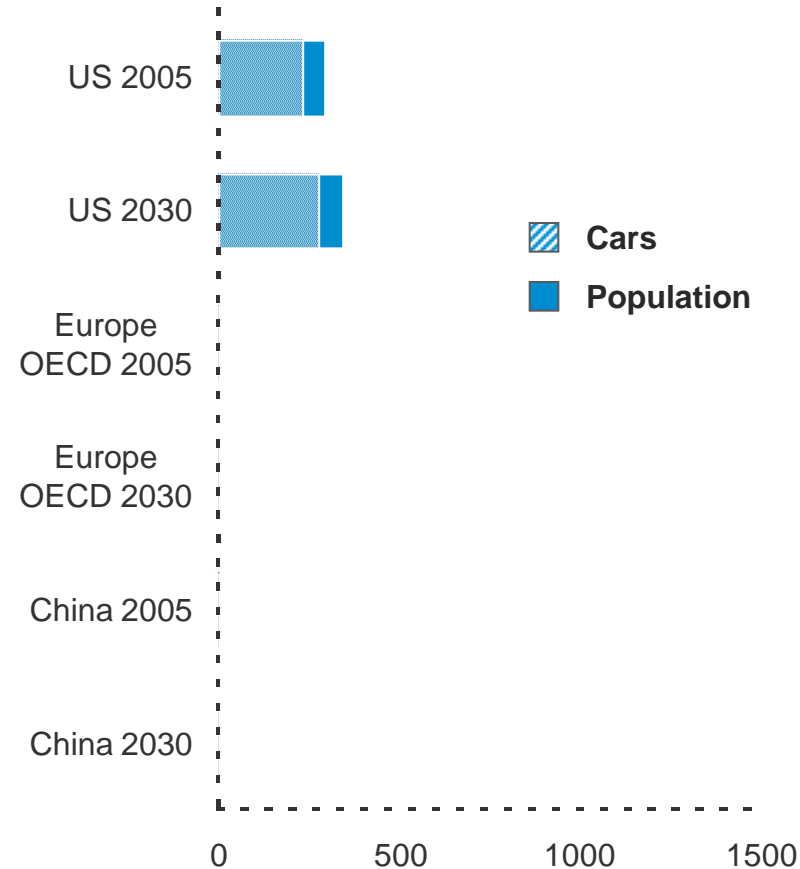


Personal Vehicle Fleet is Growing



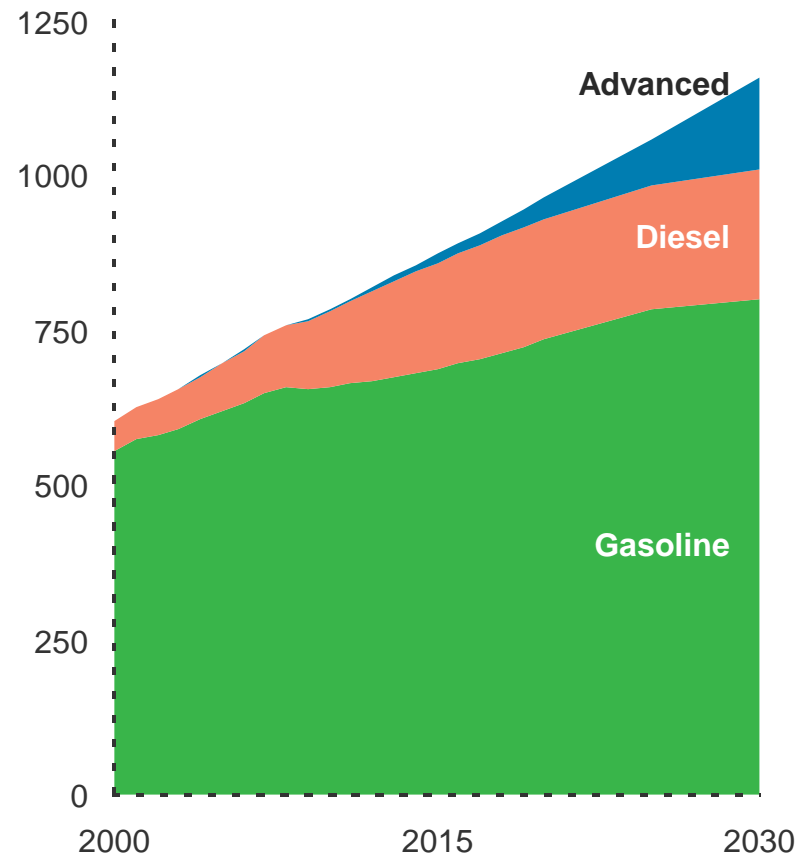
Vehicle Penetration

Cars and Population (millions)

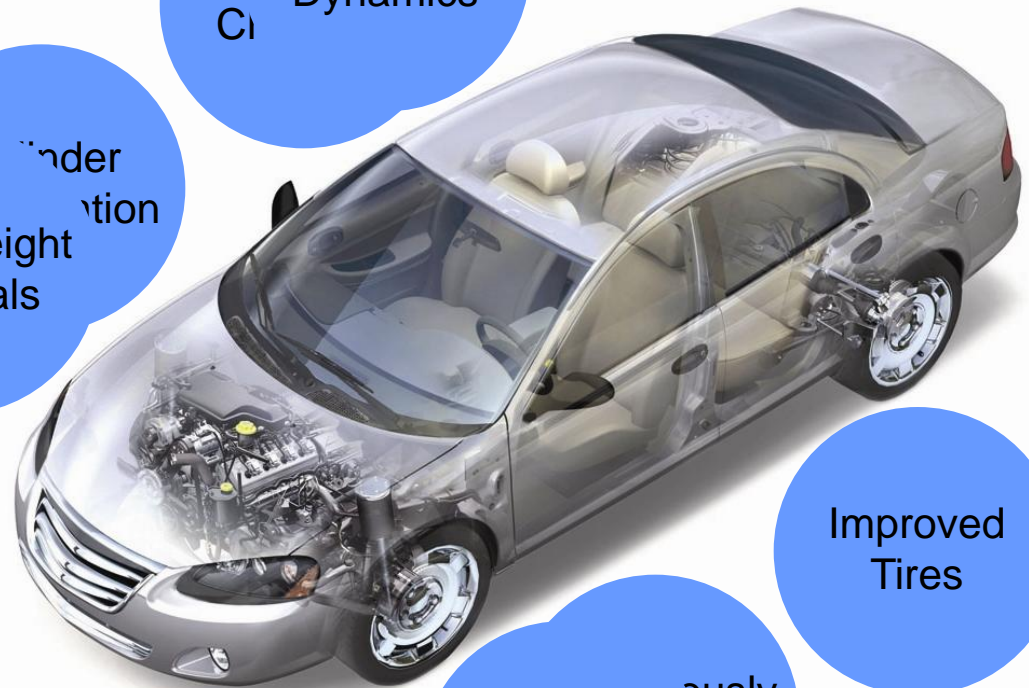
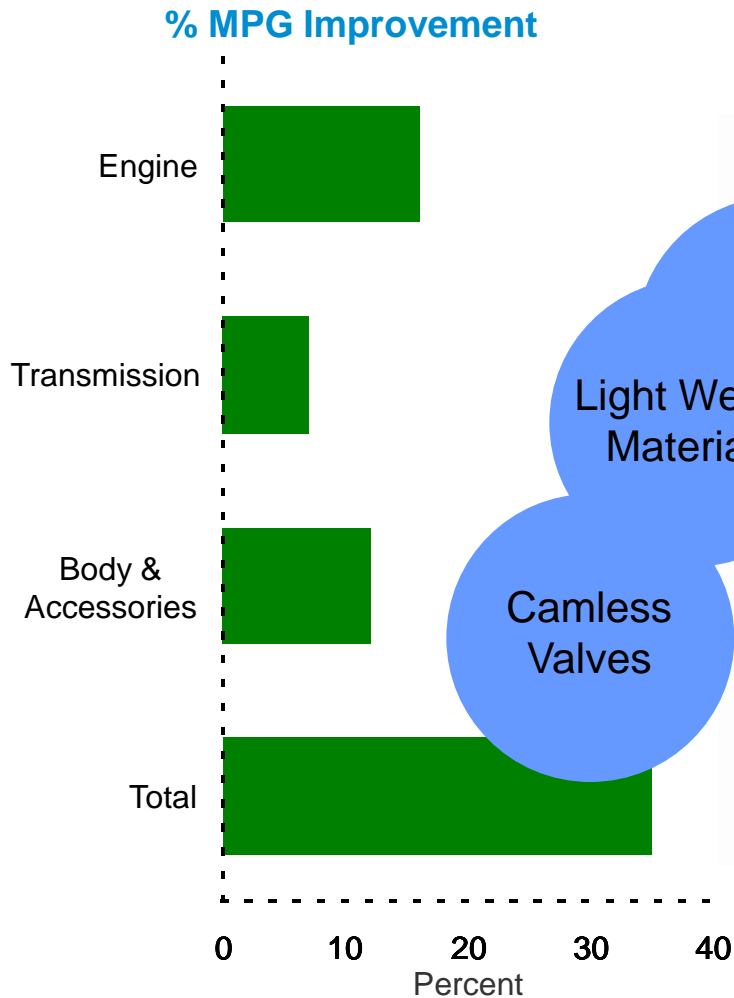


Fleet by Car Type

Million Cars



Improving Today's Vehicle



Aero -
Dynamics

Under
body

Light Weight
Materials

Camless
Valves

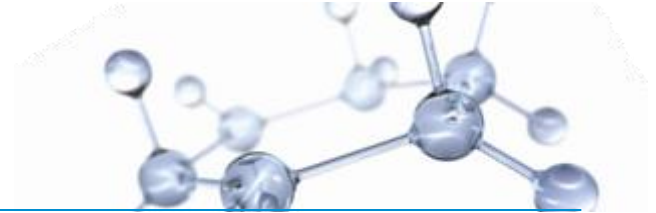
Improved
Tires

6 Speed
7 Speed

A/C
Efficiency

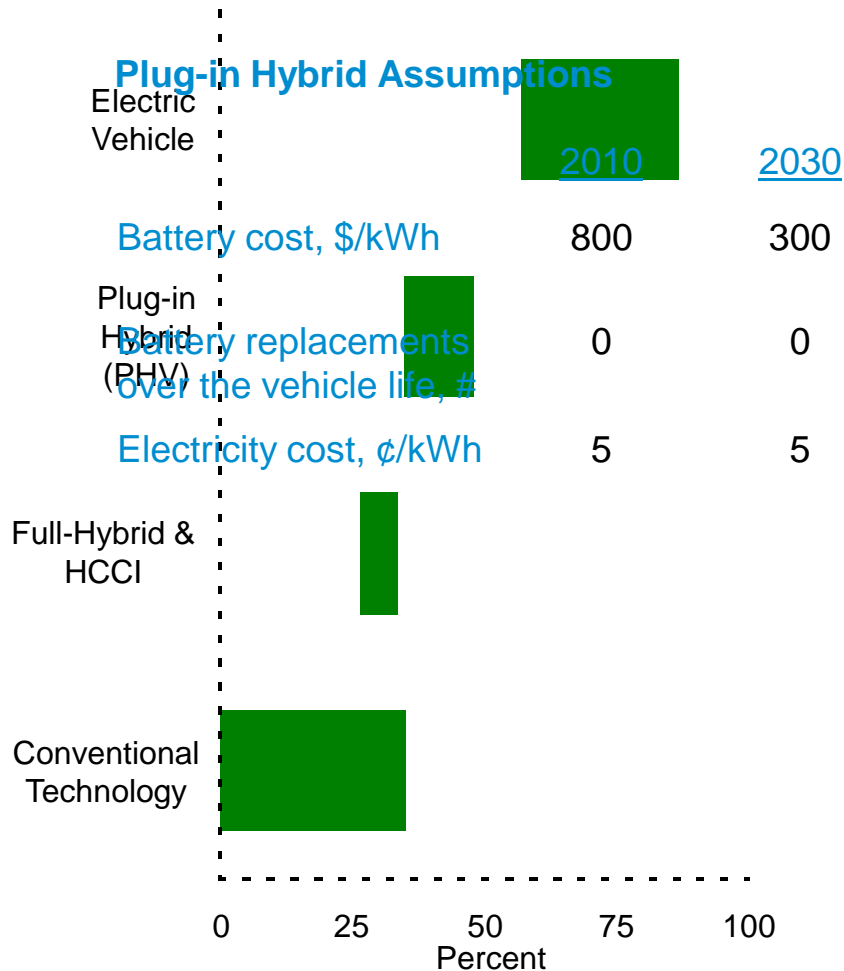
ously
e

Light Duty Vehicle Technology

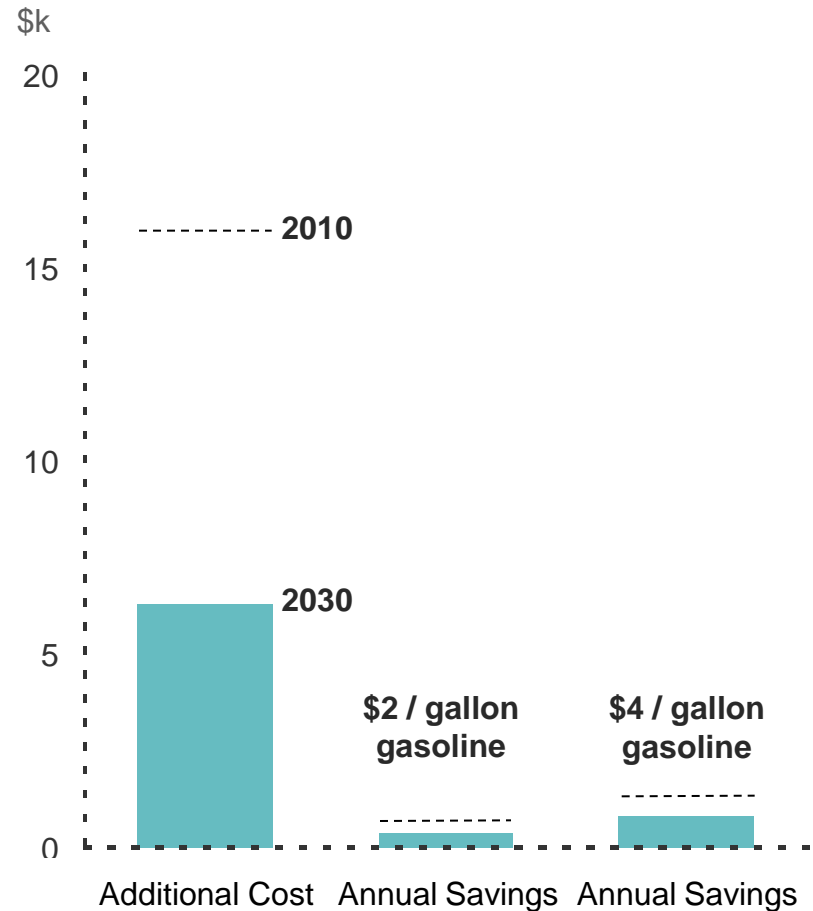


% Efficiency Improvement

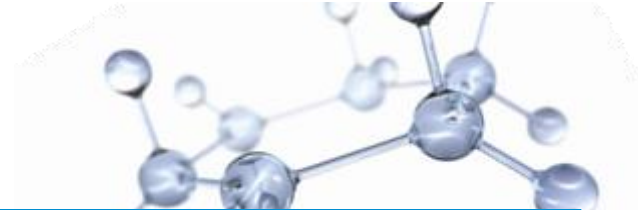
Well to Wheels Gasoline Equiv.



Plug-in Hybrid vs. Conventional Vehicles

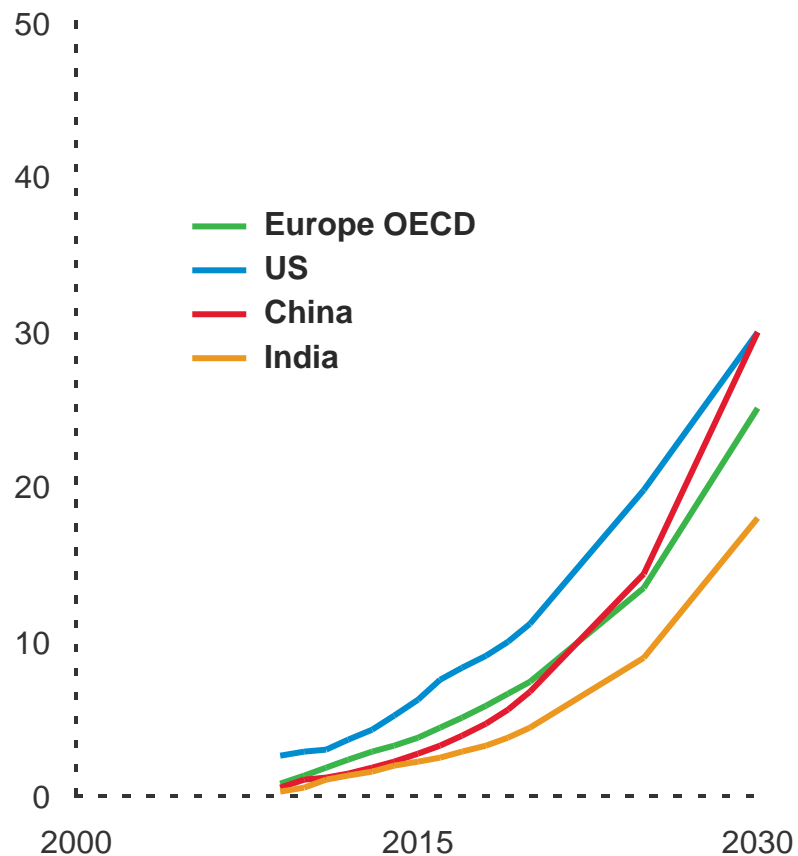


Light Duty Vehicles



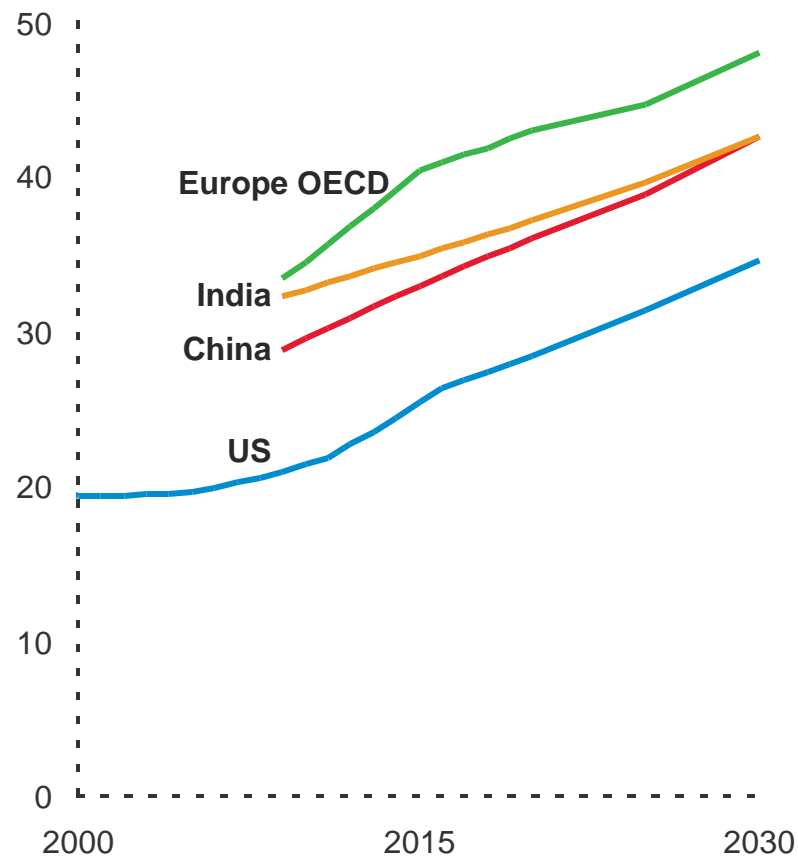
Advanced Cars*

Percent of New Sales



Average New Car

MPG



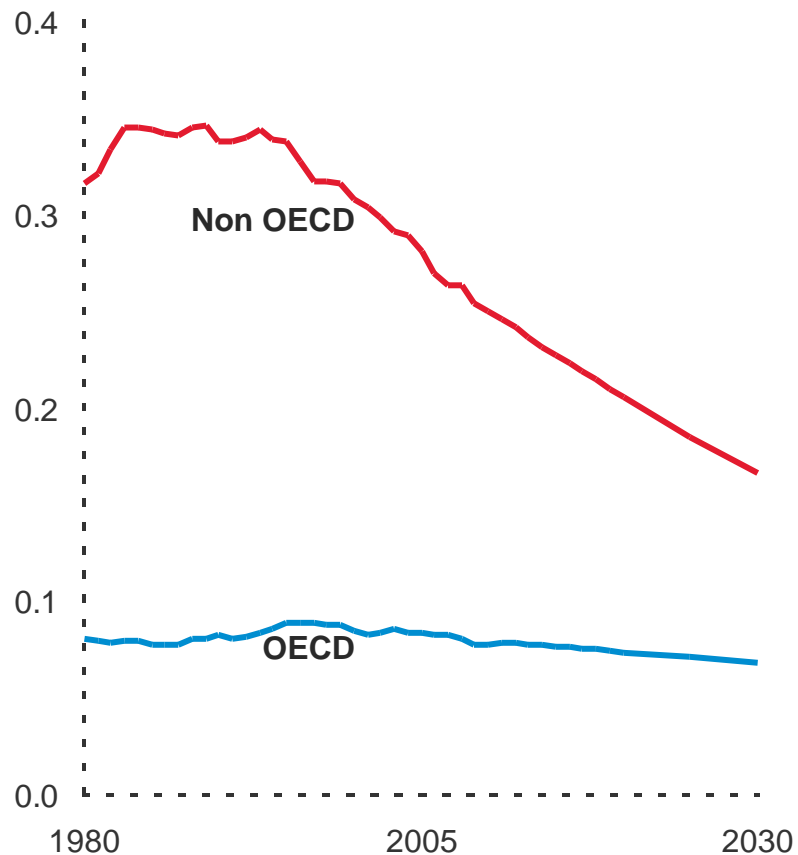
*Full Hybrids, HCCI, PHV, EV

Heavy Duty Vehicles



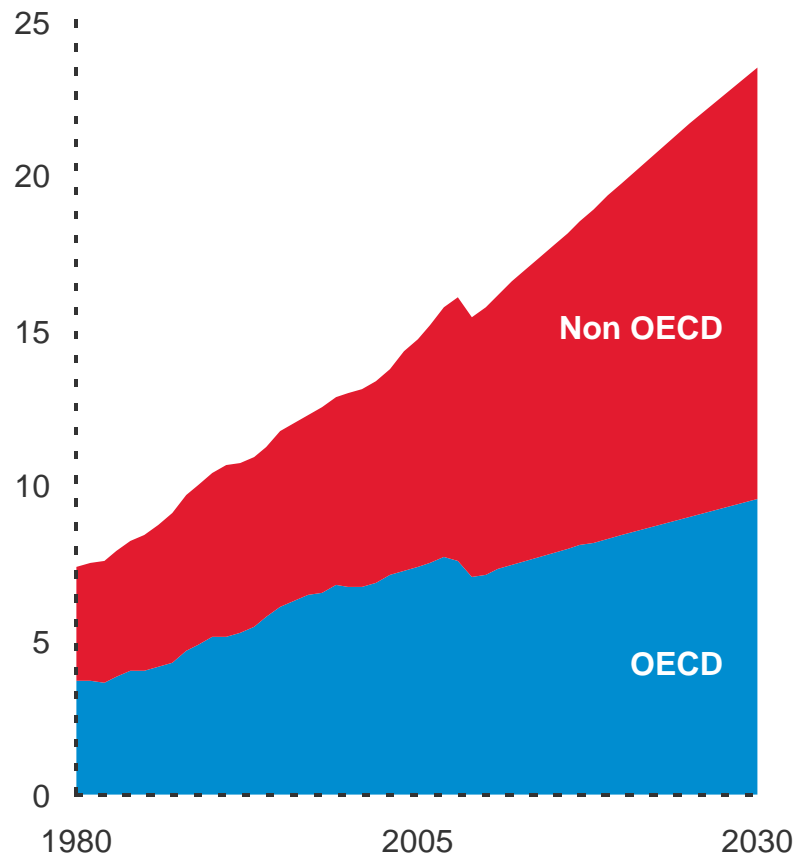
Intensity

BOE / 2005\$ k GDP



By Region

MBDOE

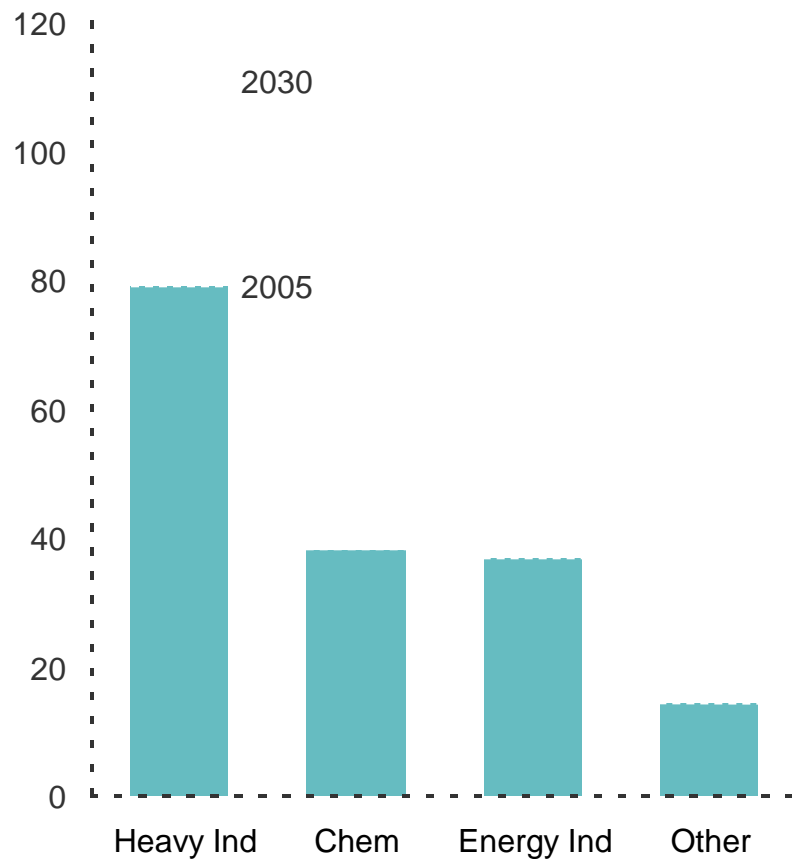


Global Industrial Demand



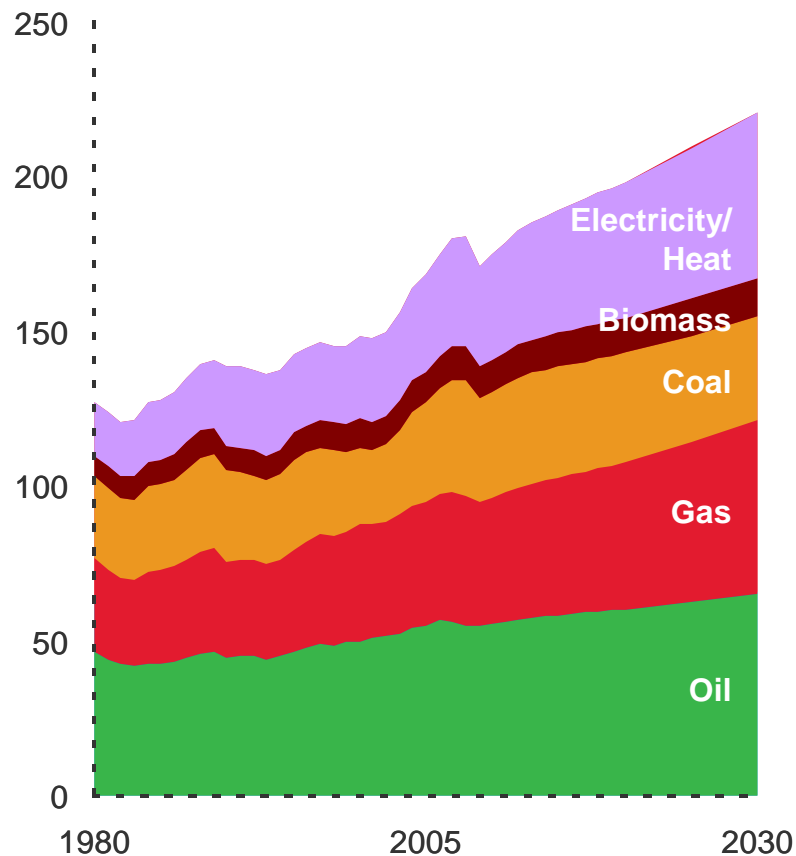
By Sector

Quadrillion BTUs



By Region

Quadrillion BTUs



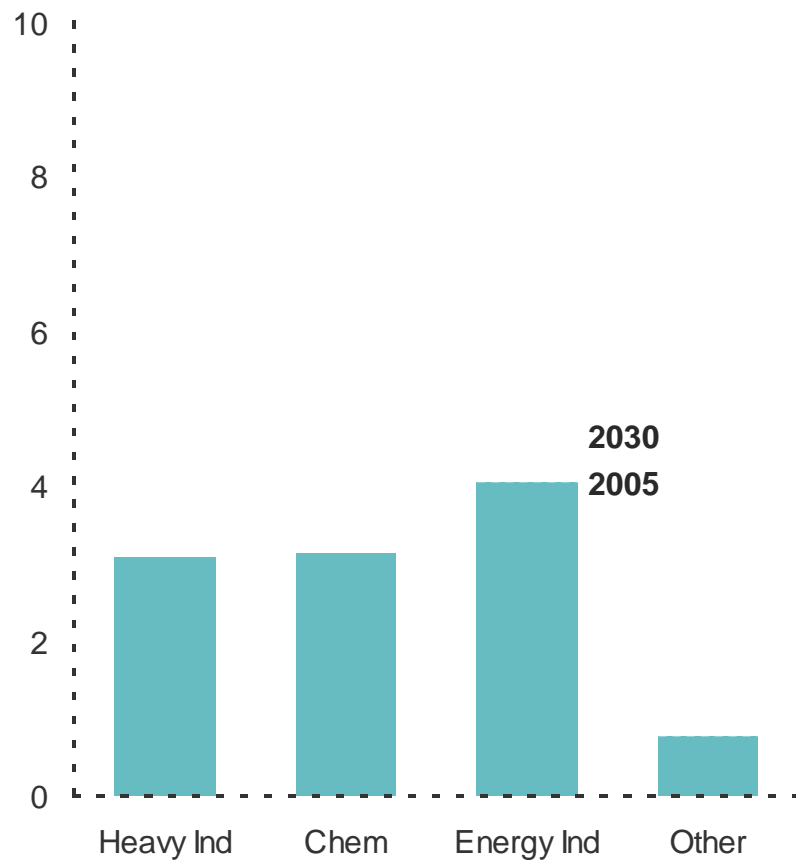
1 MBDOE = ~2 Quadrillion BTUs

MENA Industrial Demand



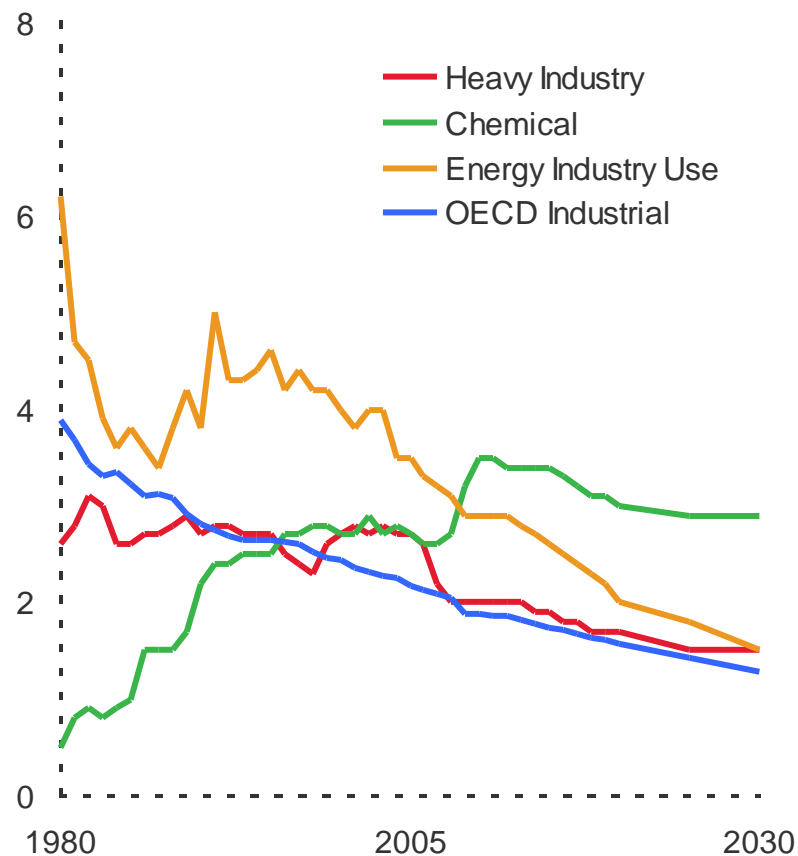
By Sector

Quadrillion BTUs



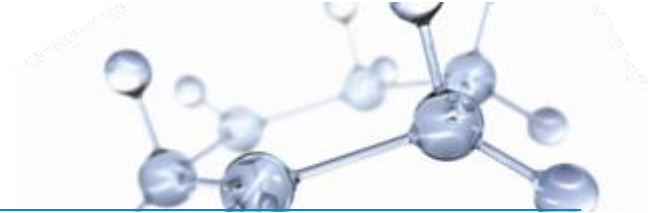
Industrial Intensity

Million BTU / 1000 US\$



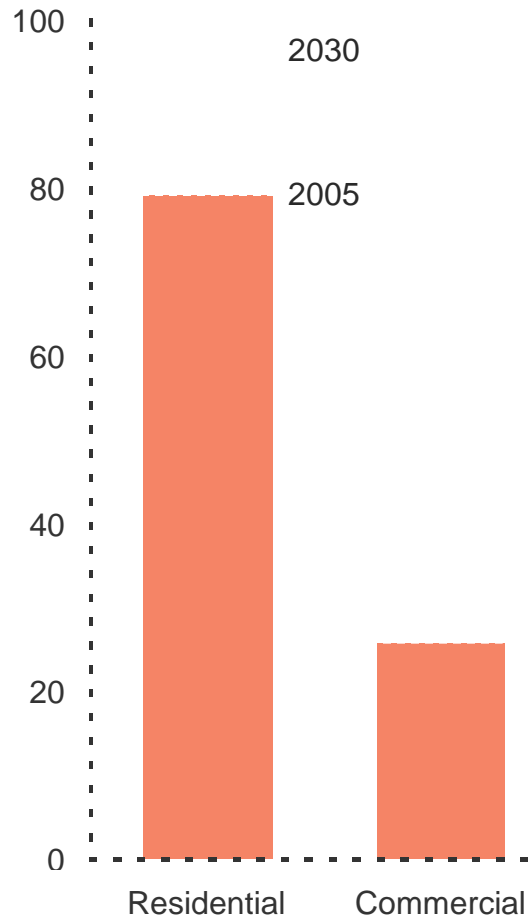
1 MBDOE = ~2 Quadrillion BTUs

Residential / Commercial Demand



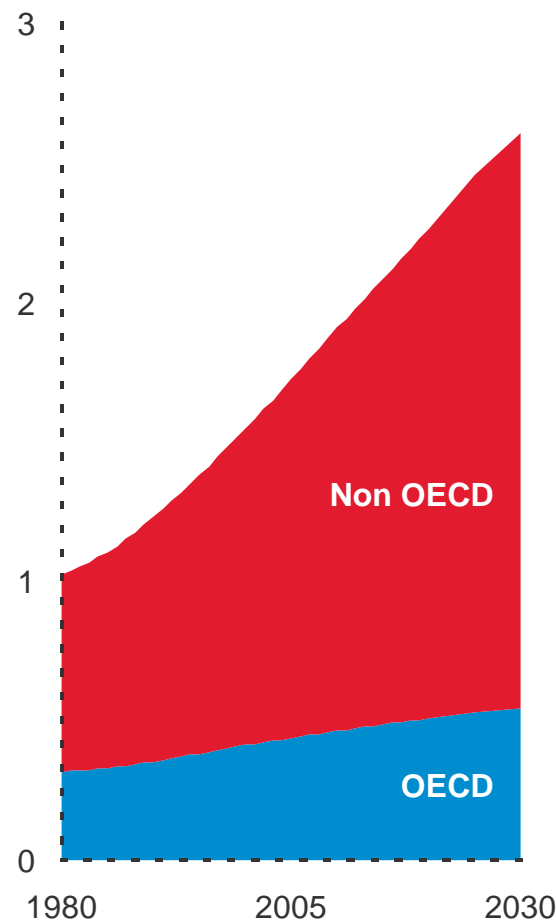
By Sector

Quadrillion BTUs



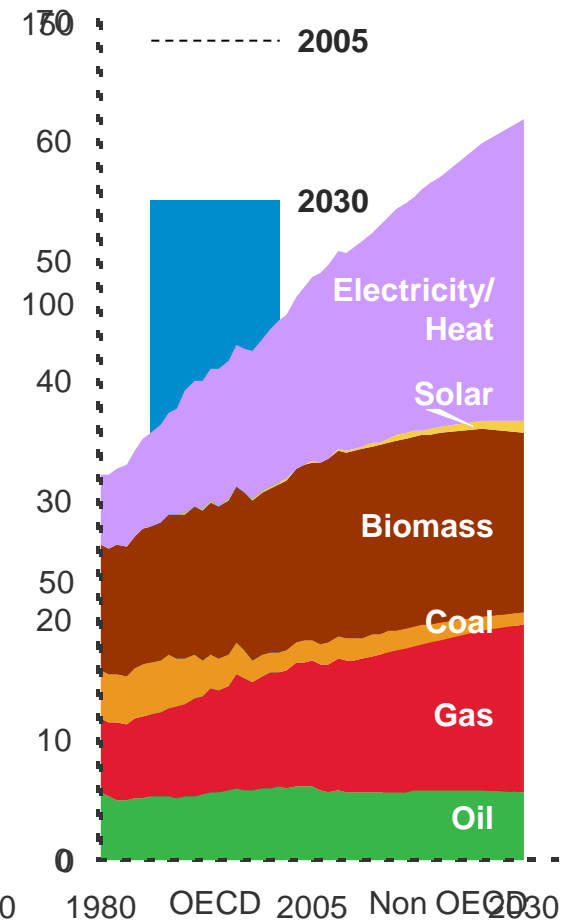
Residential

Billion Households

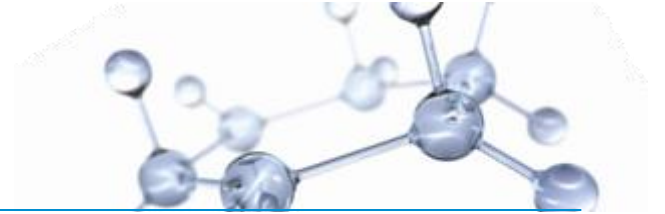


Residential Energy Use

Quadrillion BTUs

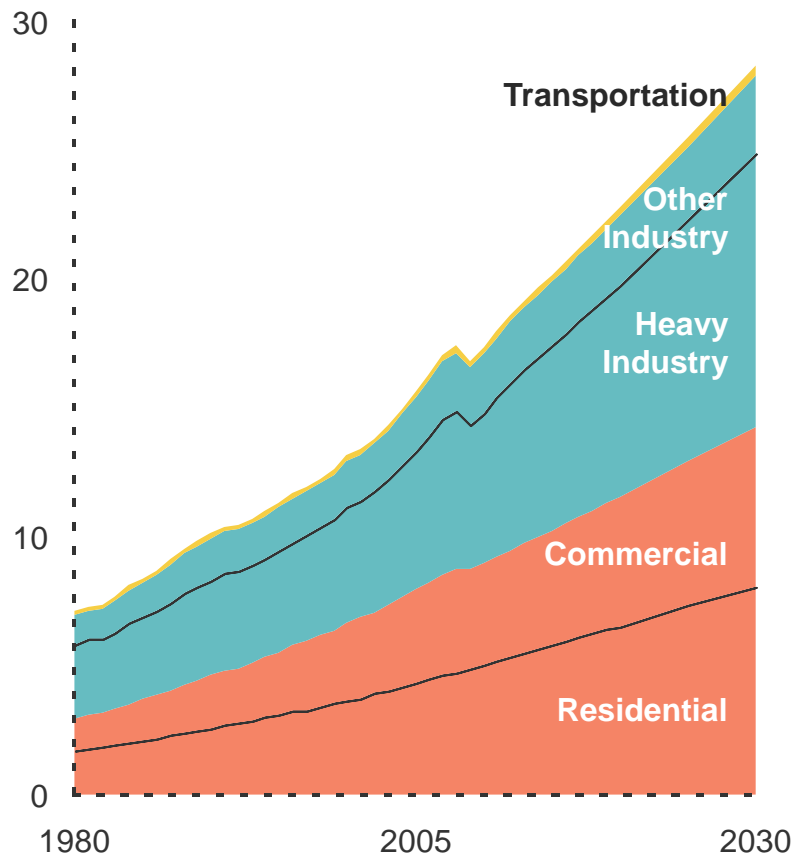


Electricity Use is Growing Fast



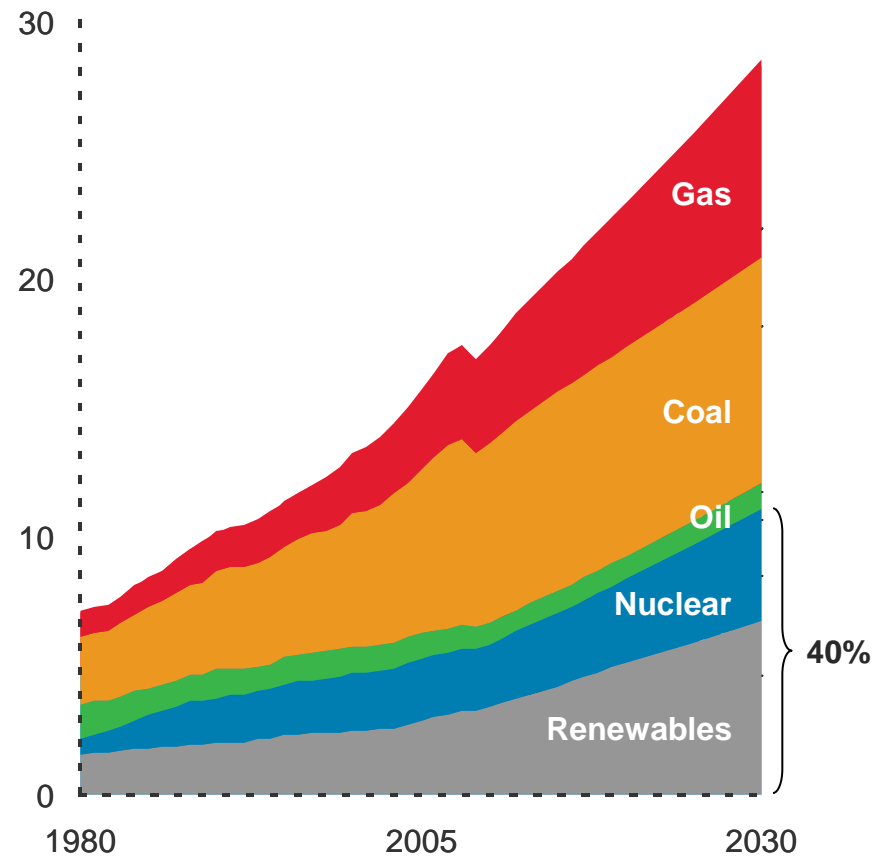
By Sector

k TWhr

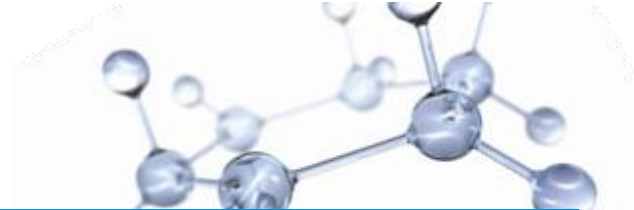


By Generation

k TWhr

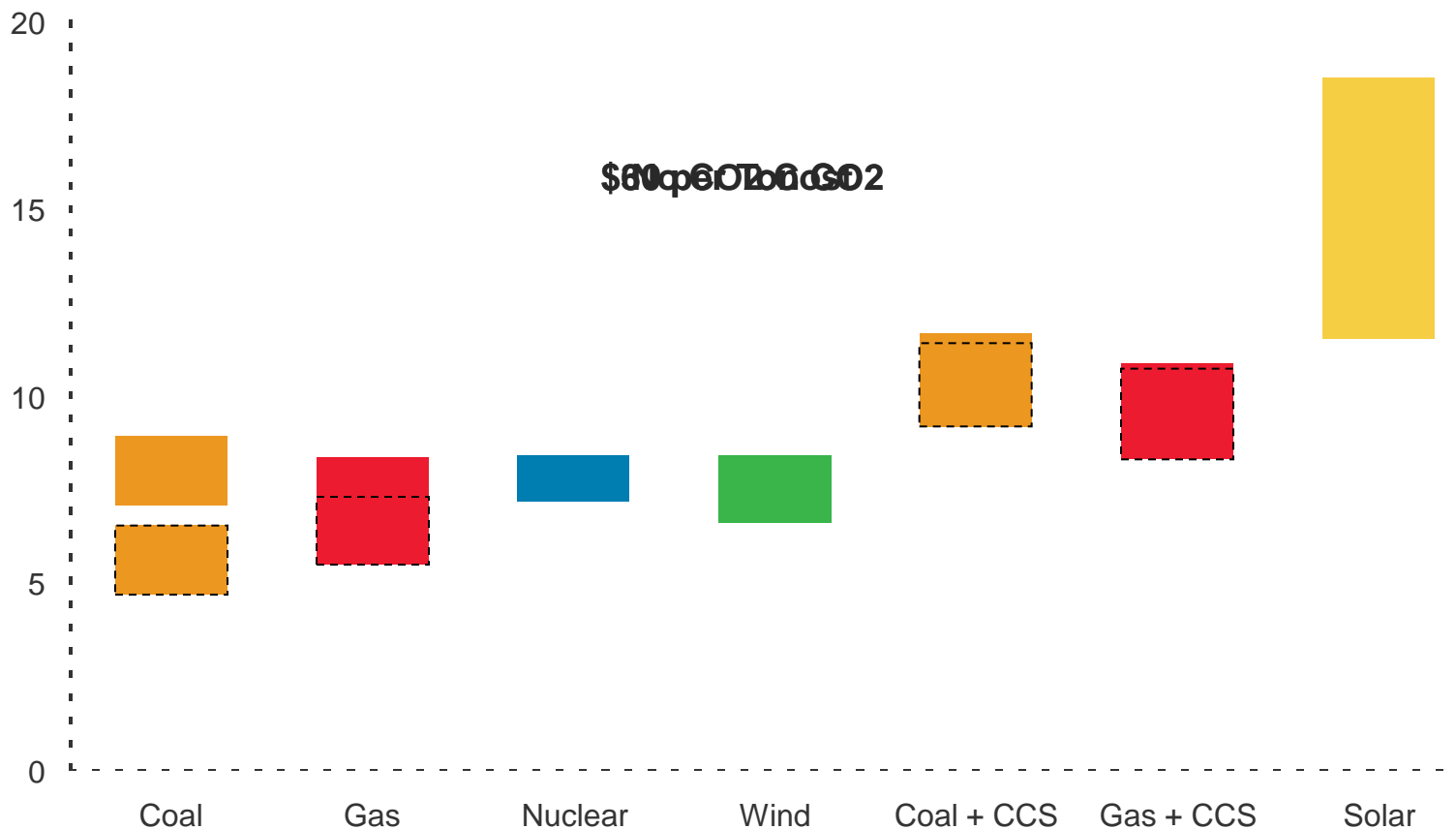


Electricity Generation Cost

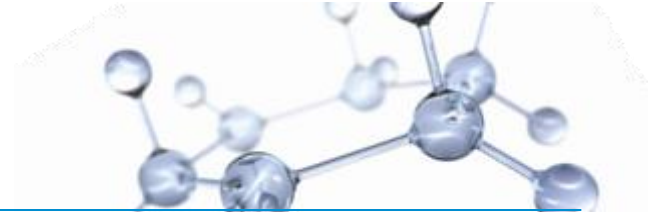


US Baseload, Startup 2025

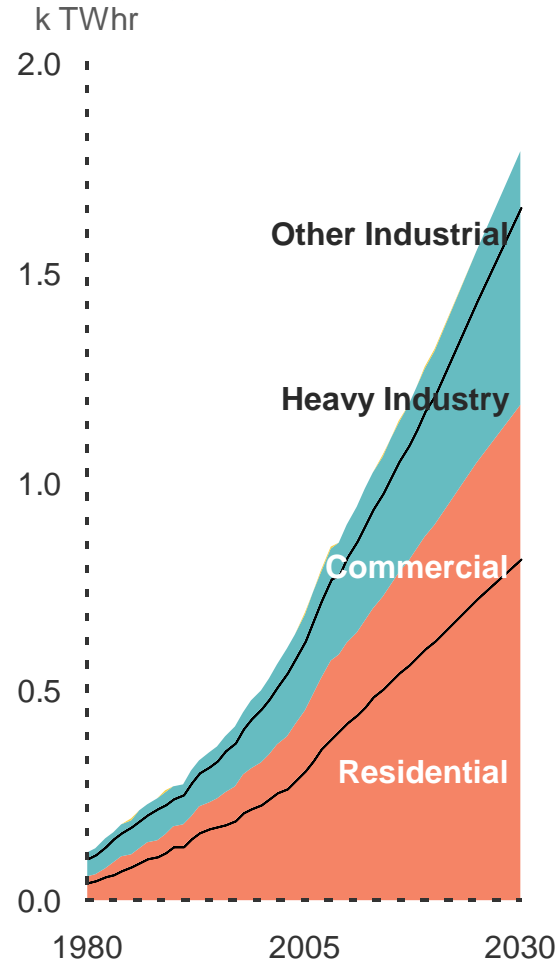
2009 Cents/kWhr



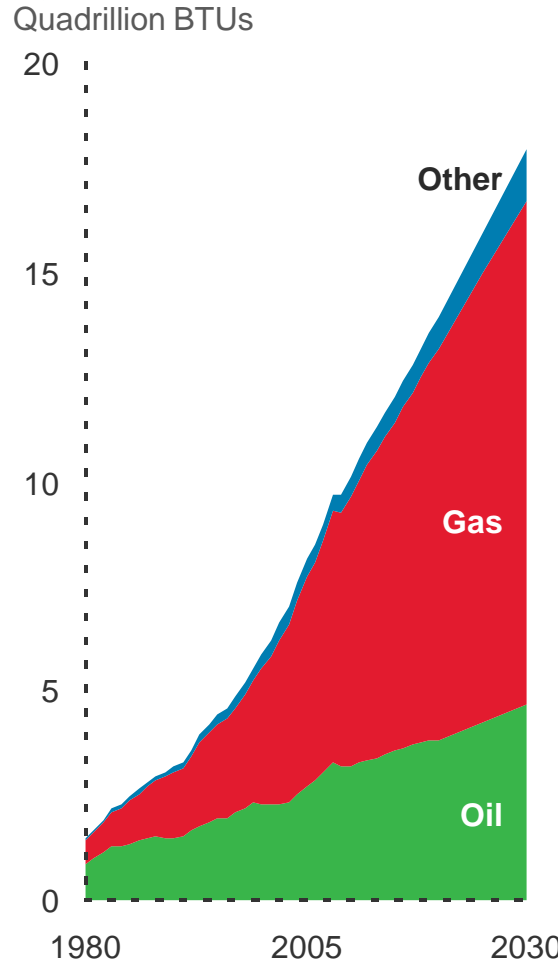
MENA Power Generation



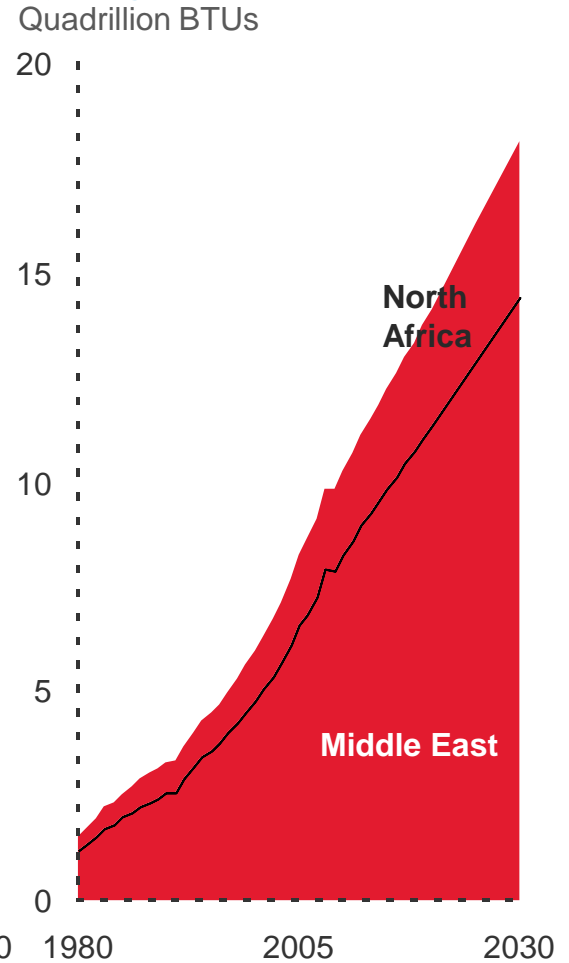
Electricity by Sector



By Fuel

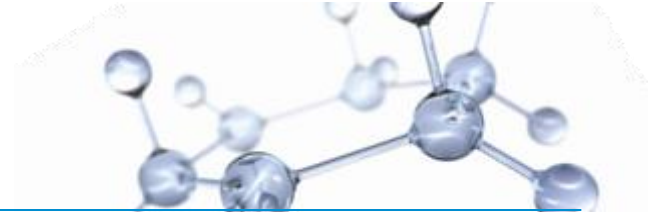


By Region



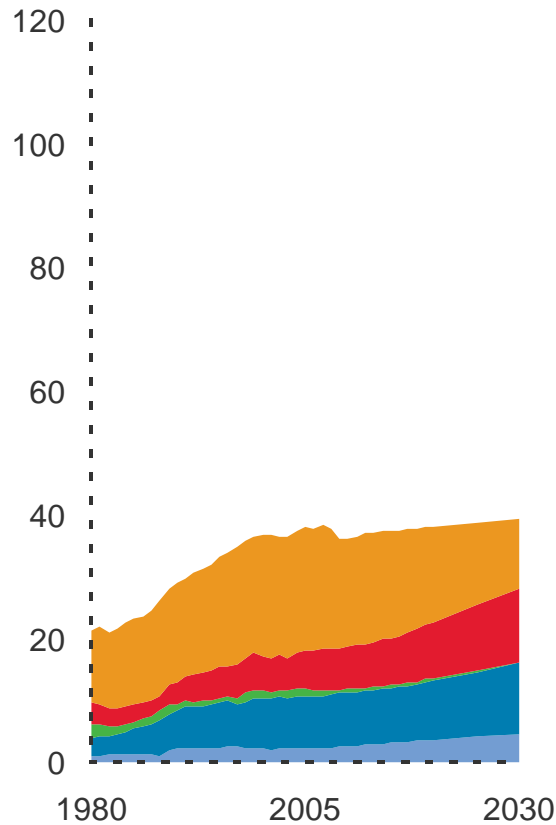
1 MBDOE = ~2 Quadrillion BTUs

Power Generation Fuel Demand



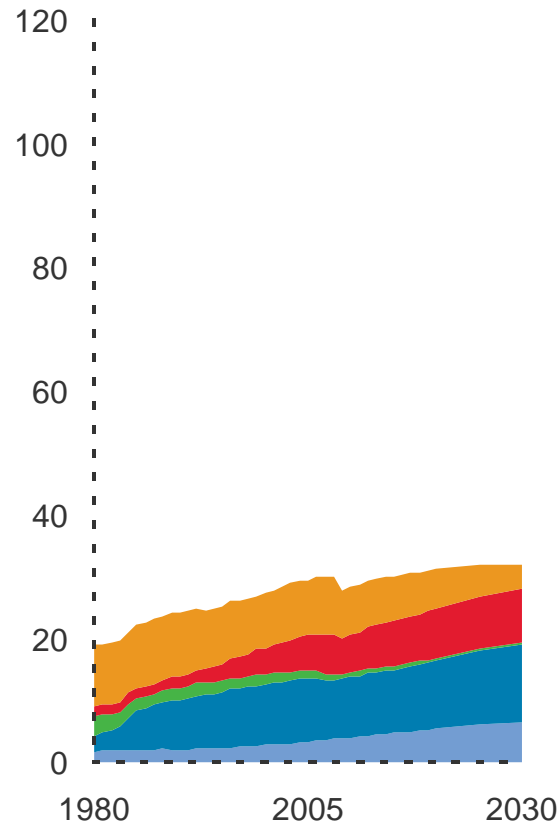
United States

Quadrillion BTUs



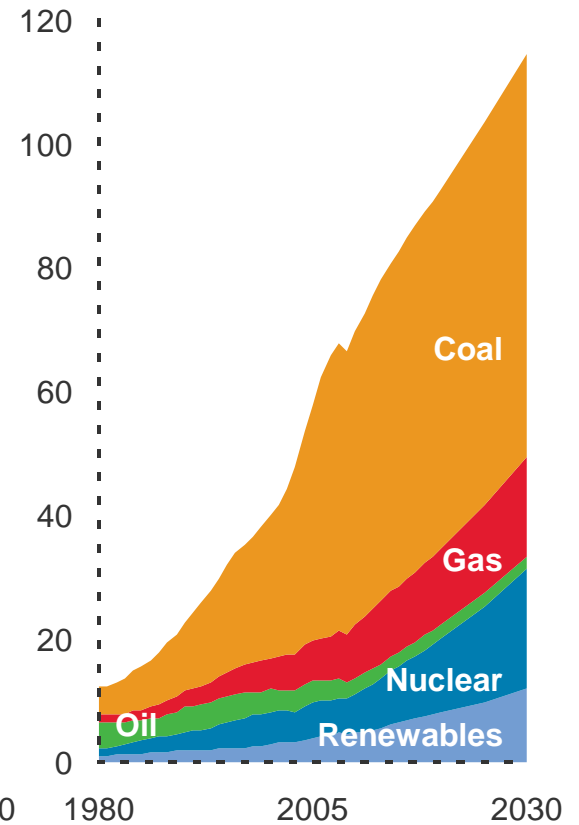
Europe OECD

Quadrillion BTUs



Asia Pacific

Quadrillion BTUs

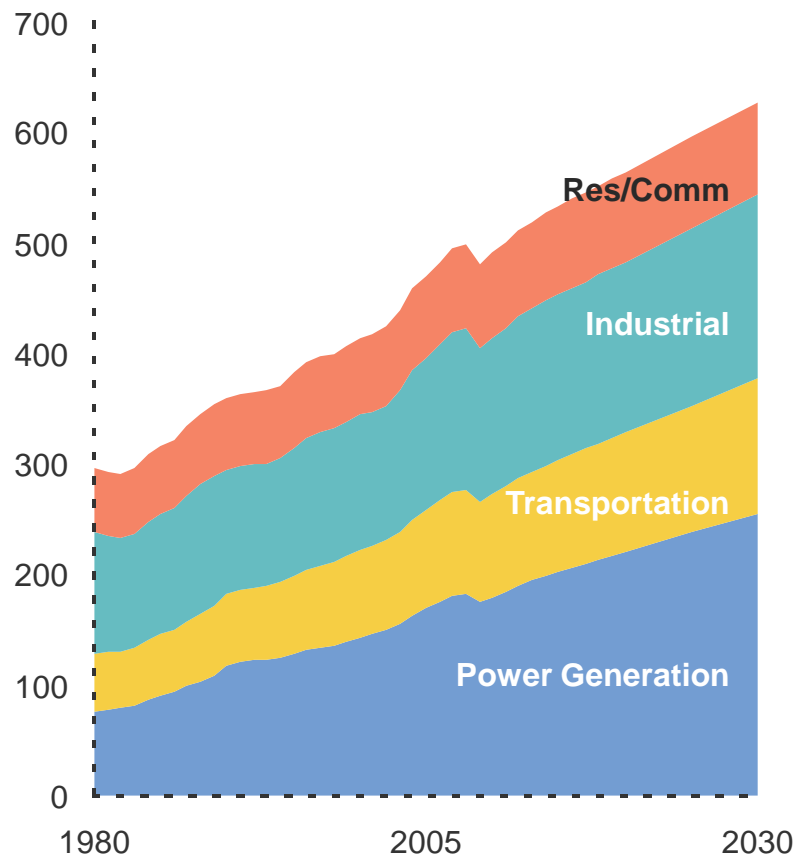


Global Energy Demand and Supply



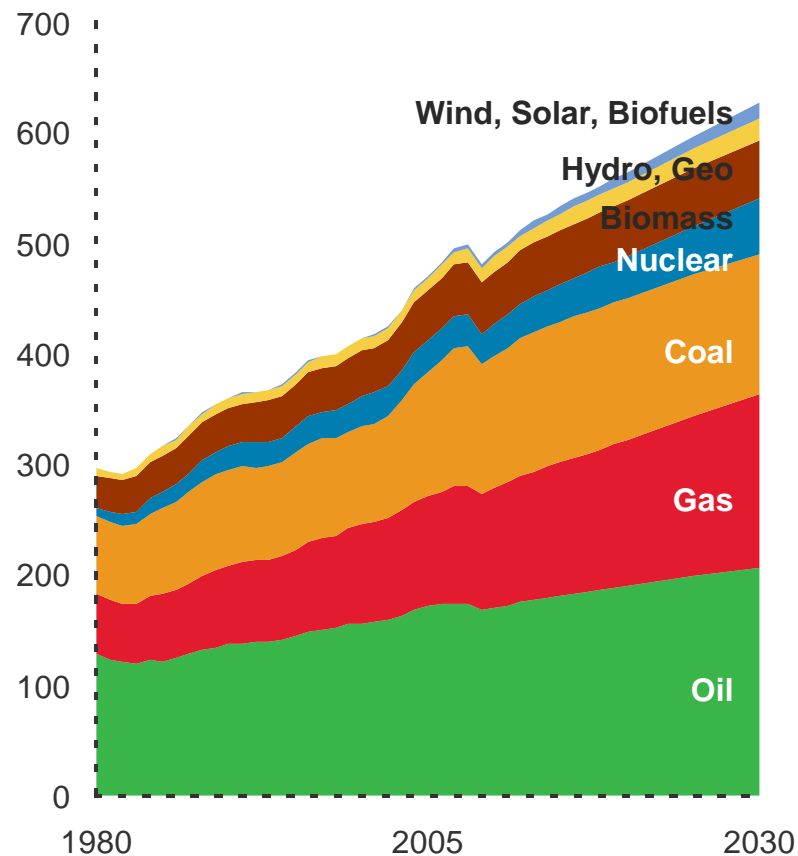
By Sector

Quadrillion BTUs



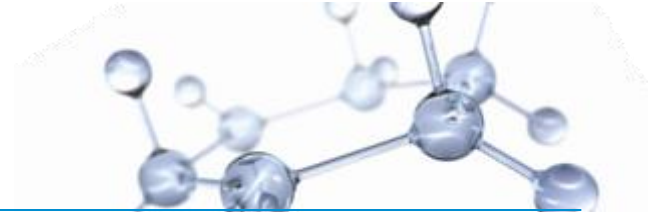
By Fuel

Quadrillion BTUs



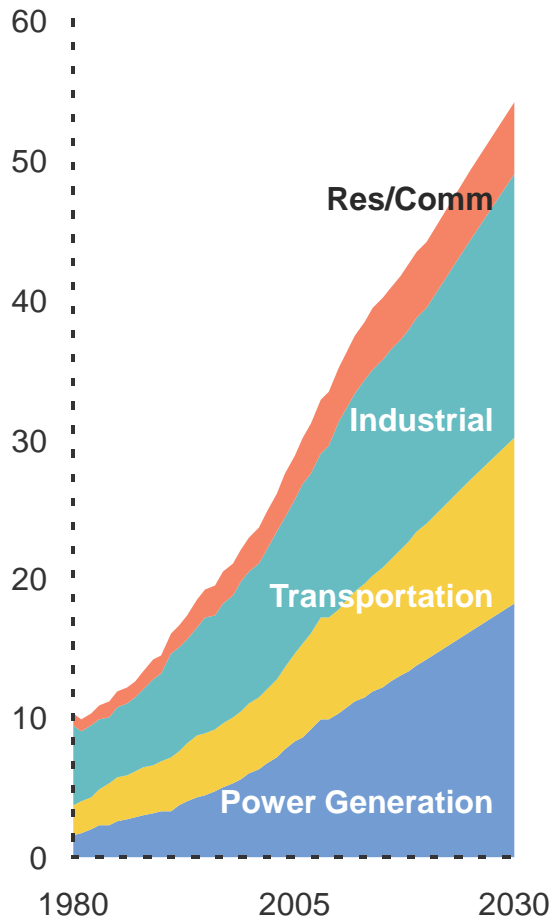
1 MBDOE = ~2 Quadrillion BTUs

MENA Energy Demand



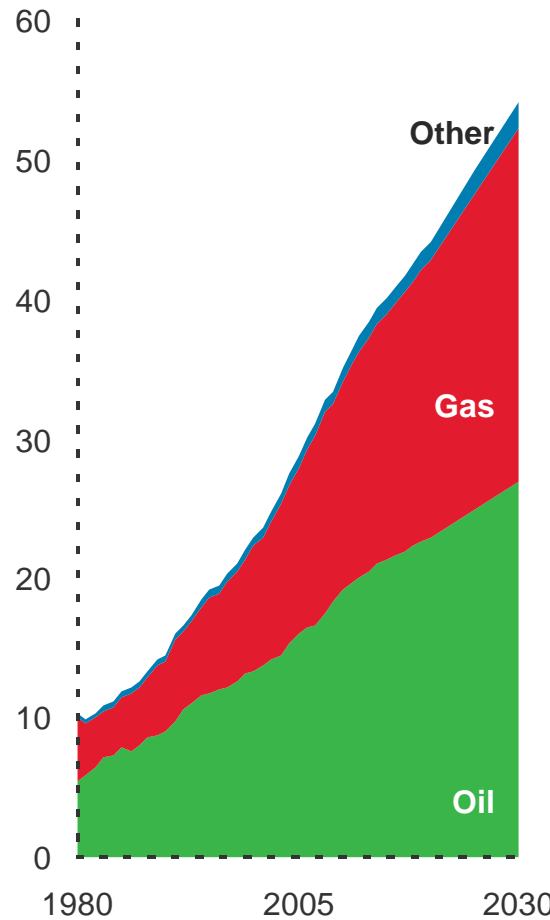
By Sector

Quadrillion BTUs



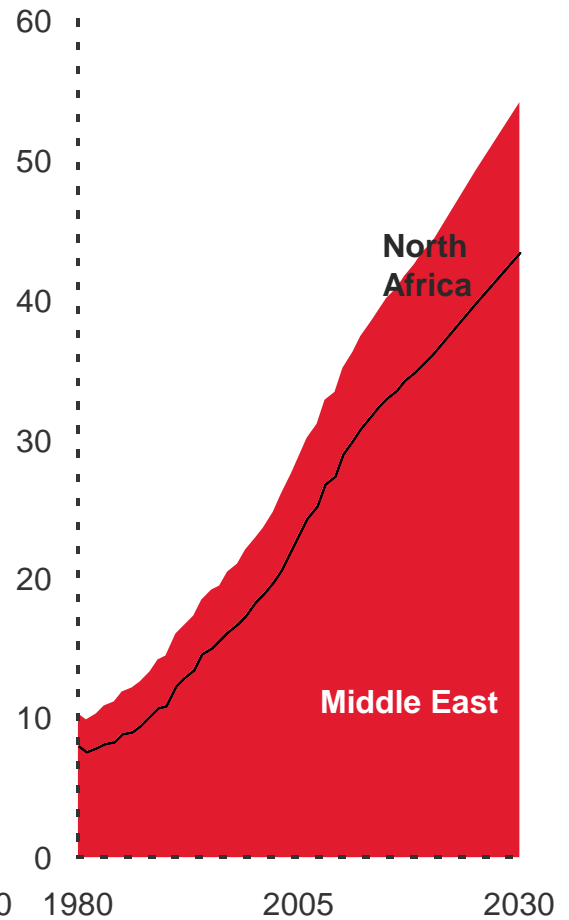
By Fuel

Quadrillion BTUs



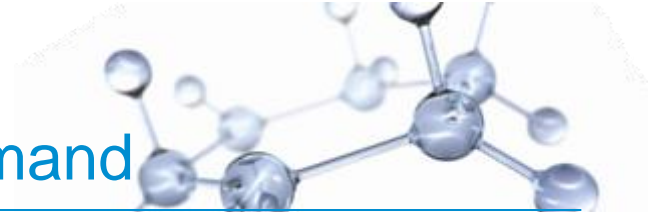
By Region

Quadrillion BTUs



1 MBD OE = ~2 Quadrillion BTUs

Economic Growth Drives Energy Demand

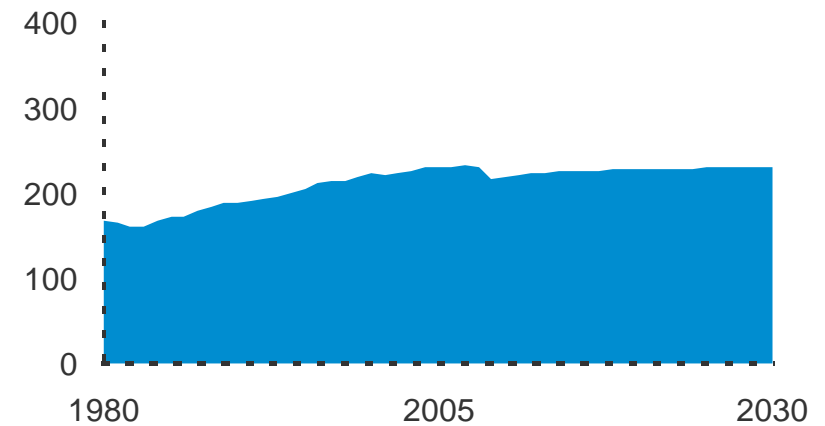
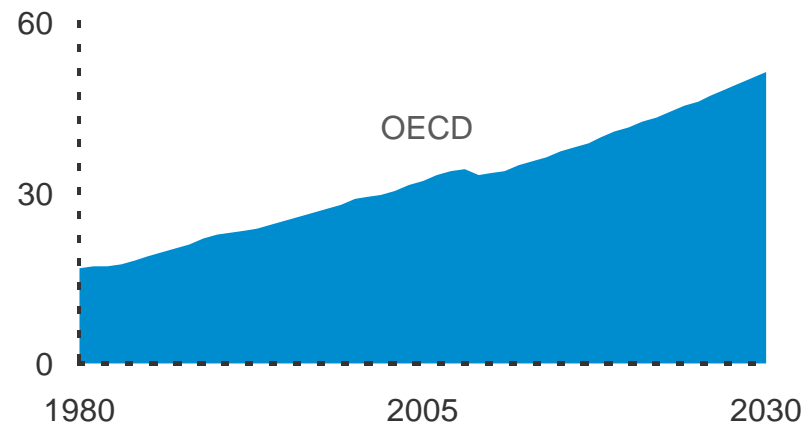


GDP

Demand

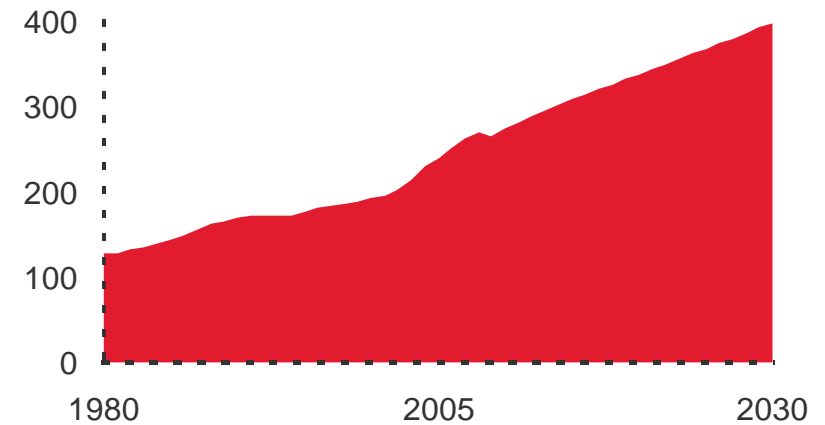
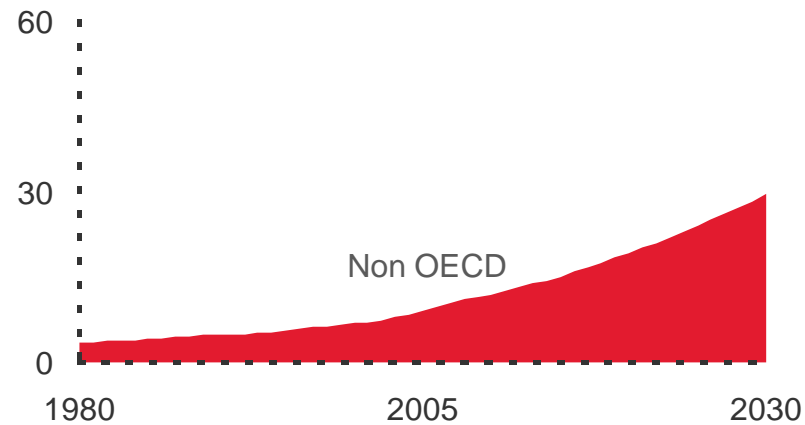
Trillion 2005\$ GDP

Quadrillion BTUs



Trillion 2005\$ GDP

Quadrillion BTUs



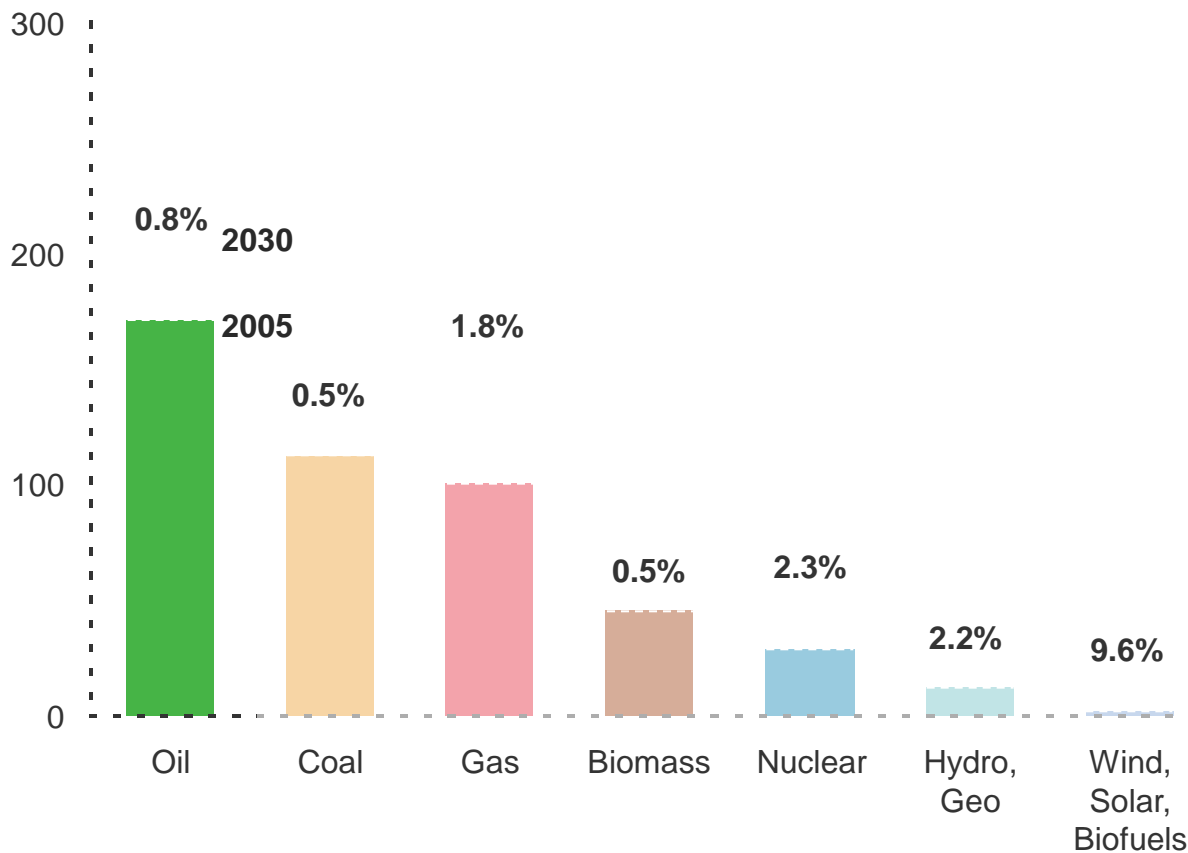
Global Energy Demand and Supply



Demand and Supply

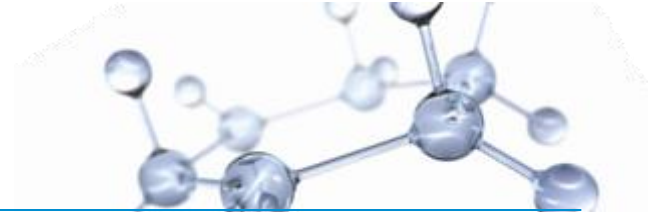
Quadrillion BTUs

2005 – 2030



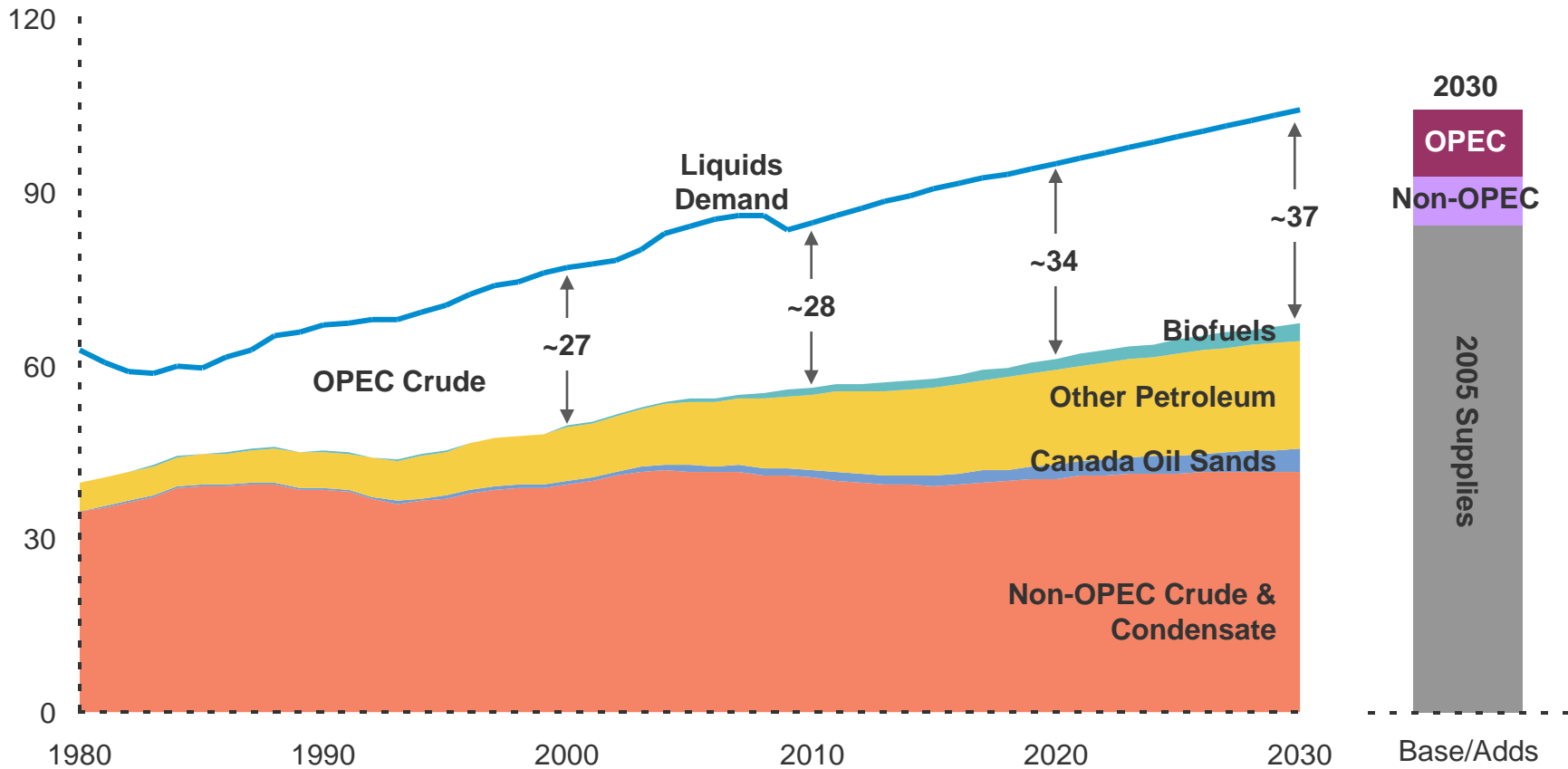
1 MBDOE = ~2 Quadrillion BTUs

Global Liquids Supply Grows



Global Liquids Supply and Demand

MBDOE

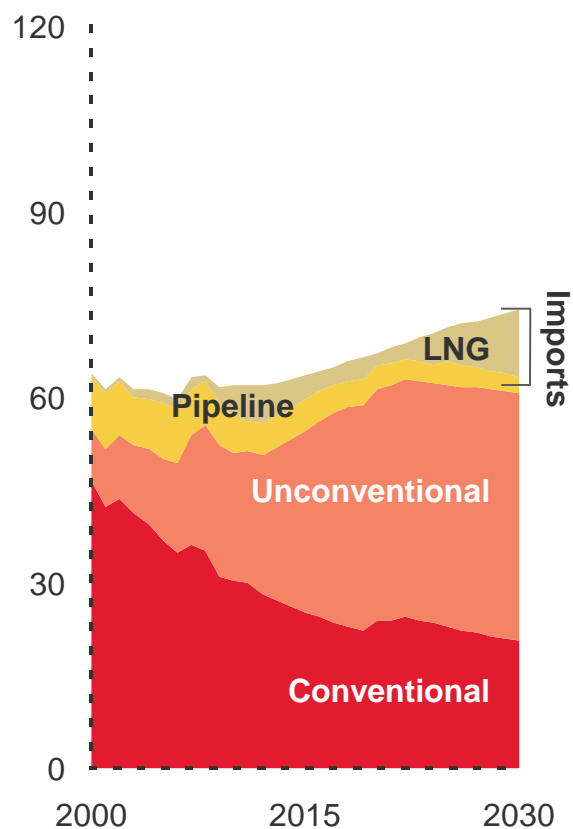


Gas Supply and Demand Balance



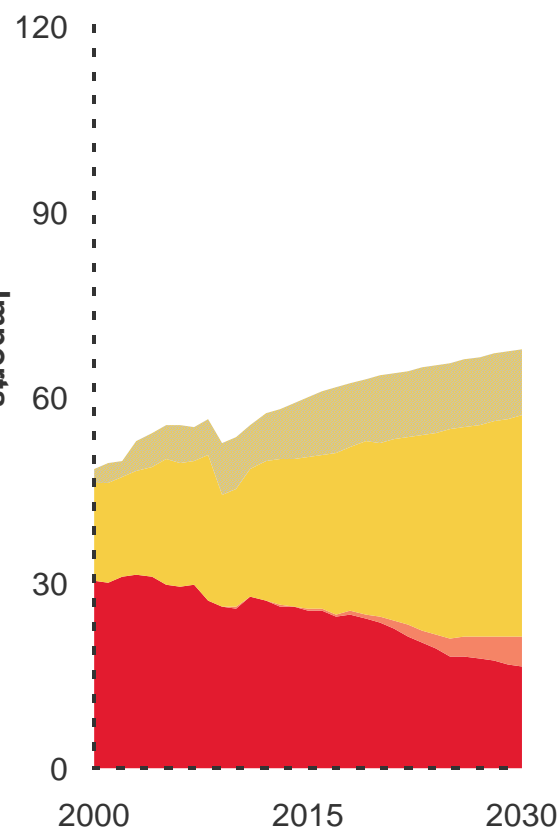
United States

BCFD



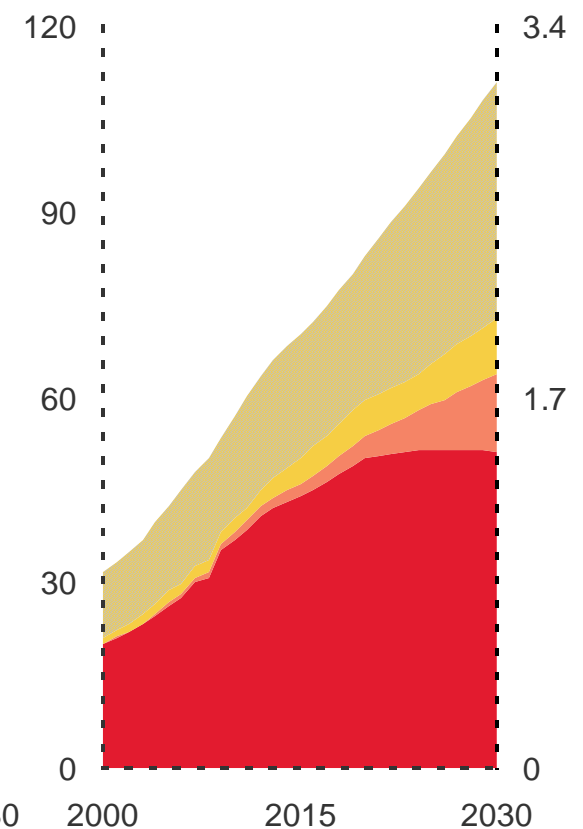
Europe

BCFD



Asia Pacific

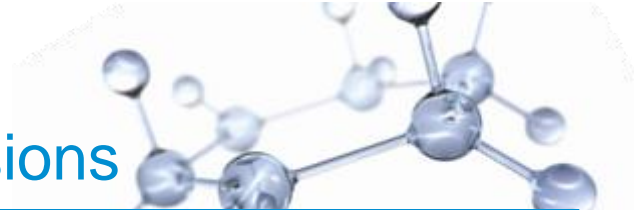
BCFD



LNG: Liquefied Natural Gas

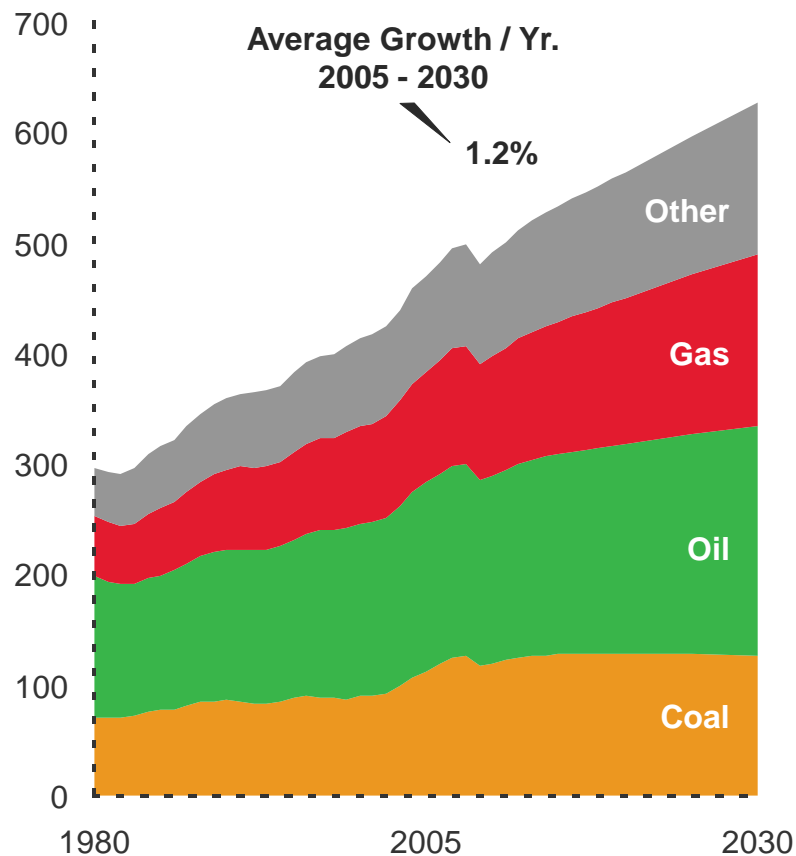
1 BCMD = ~35 BCFD

Global Energy Demand & CO₂ Emissions



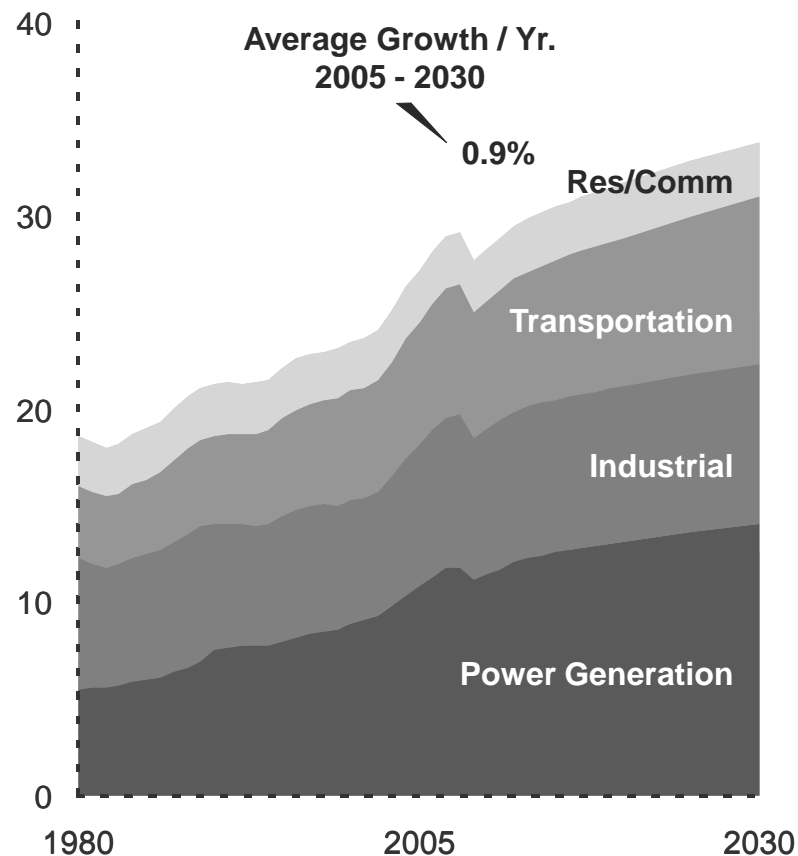
Demand

Quadrillion BTUs



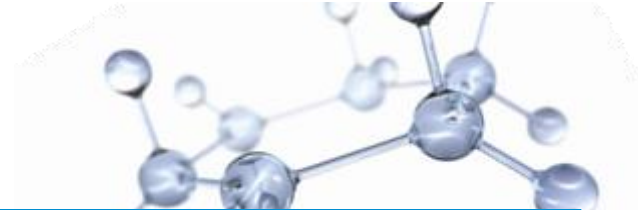
CO₂ Emissions

Billion Tons



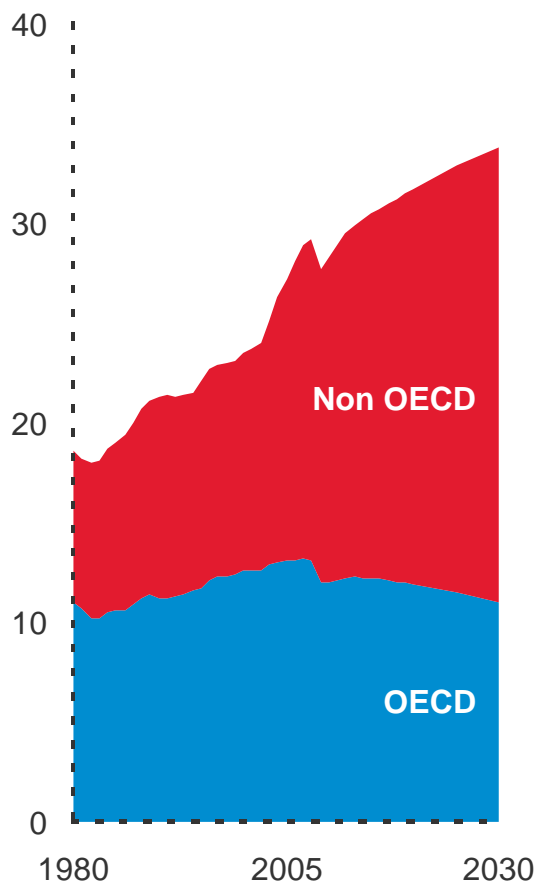
1 MBDOE = ~2 Quadrillion BTUs

CO₂ Emissions



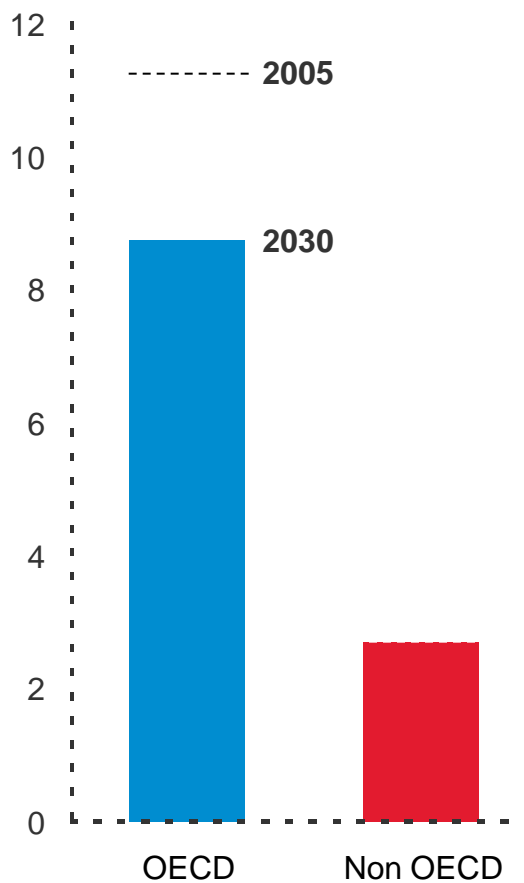
CO₂ Emissions

Billion Tons



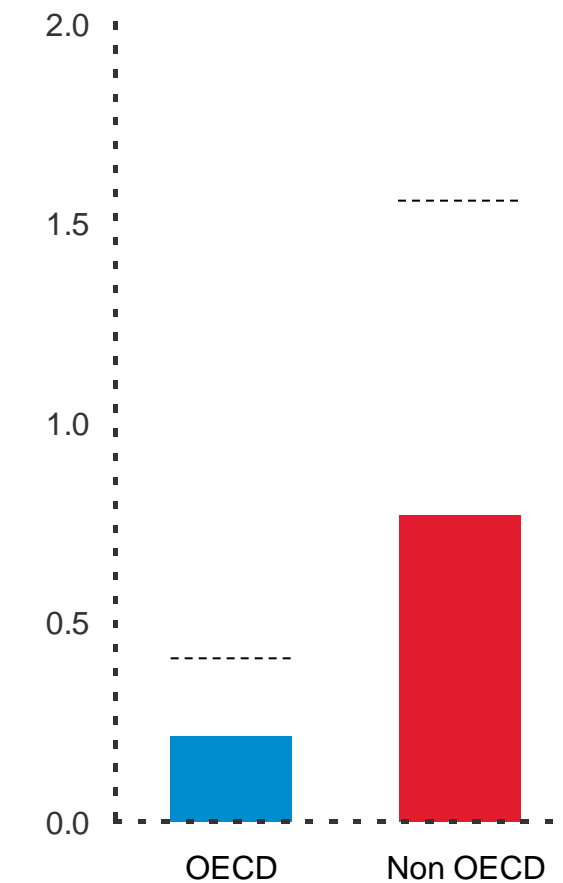
Emissions per Capita

Tons / Person



Emissions per GDP

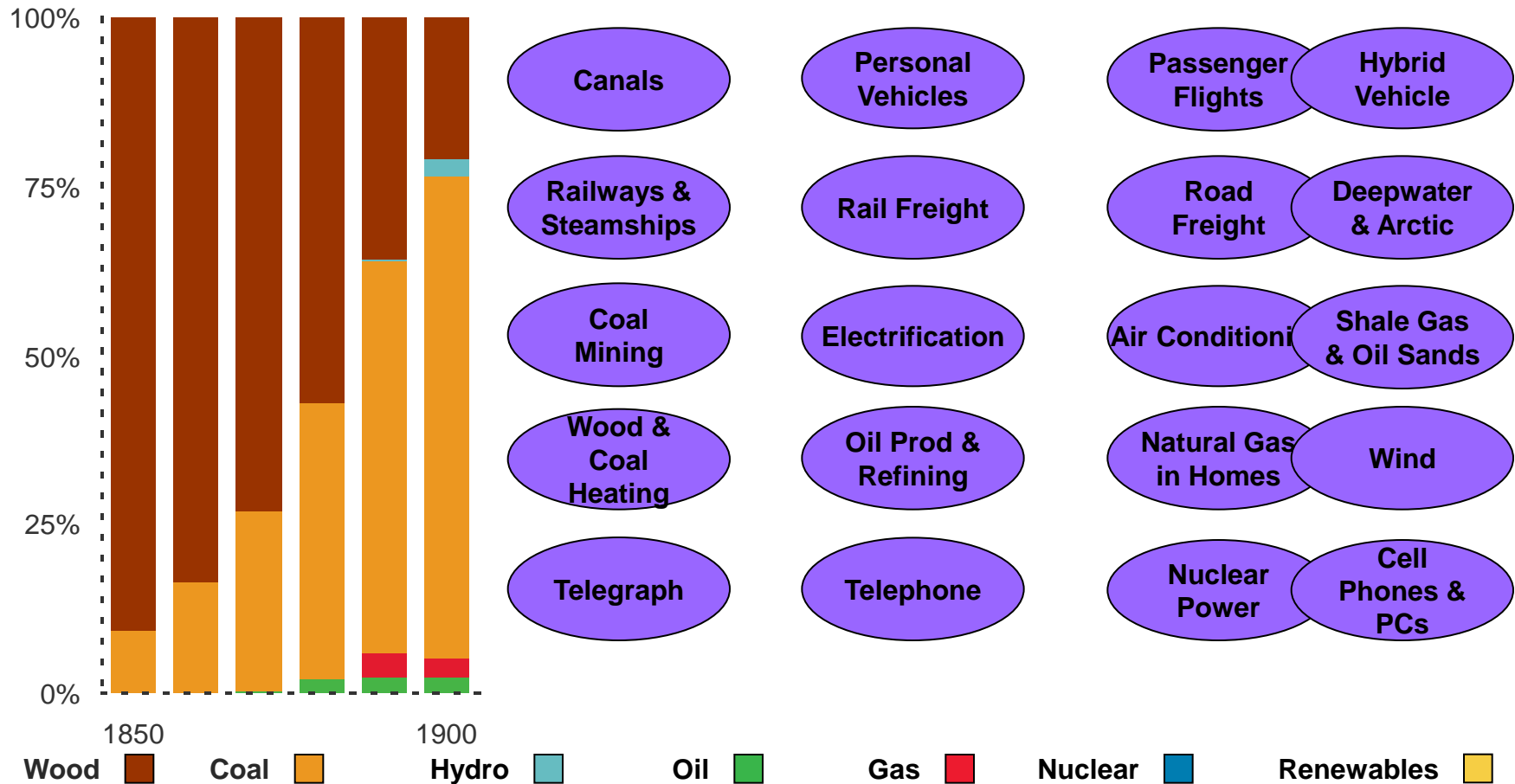
Tons / 2005\$ k GDP



Transition to Modern Energy / Technology

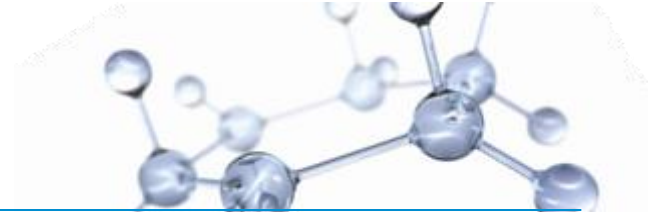
US Energy Demand

Percent



Energy Information Agency

Integrated Energy Solutions



Now

- 6.7 billion people
- Global economic linkages
- Disparate living standards
- Enormous energy requirements
- Environmental goals
- Growing technology

Mitigate
Emissions



2030
Increase
Efficiency

on people

OECD leads economic growth

living standards improve

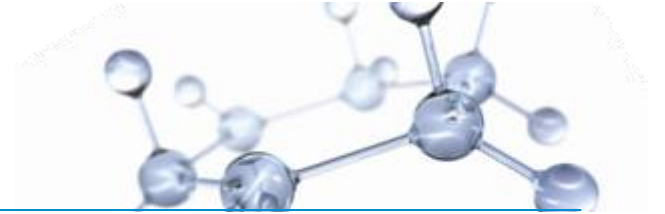
needs up one-third

ironmental goals

Expand
Supply

Technology





ExxonMobil™