



The Outlook for Energy: A View to 2040

New York Energy Forum
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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

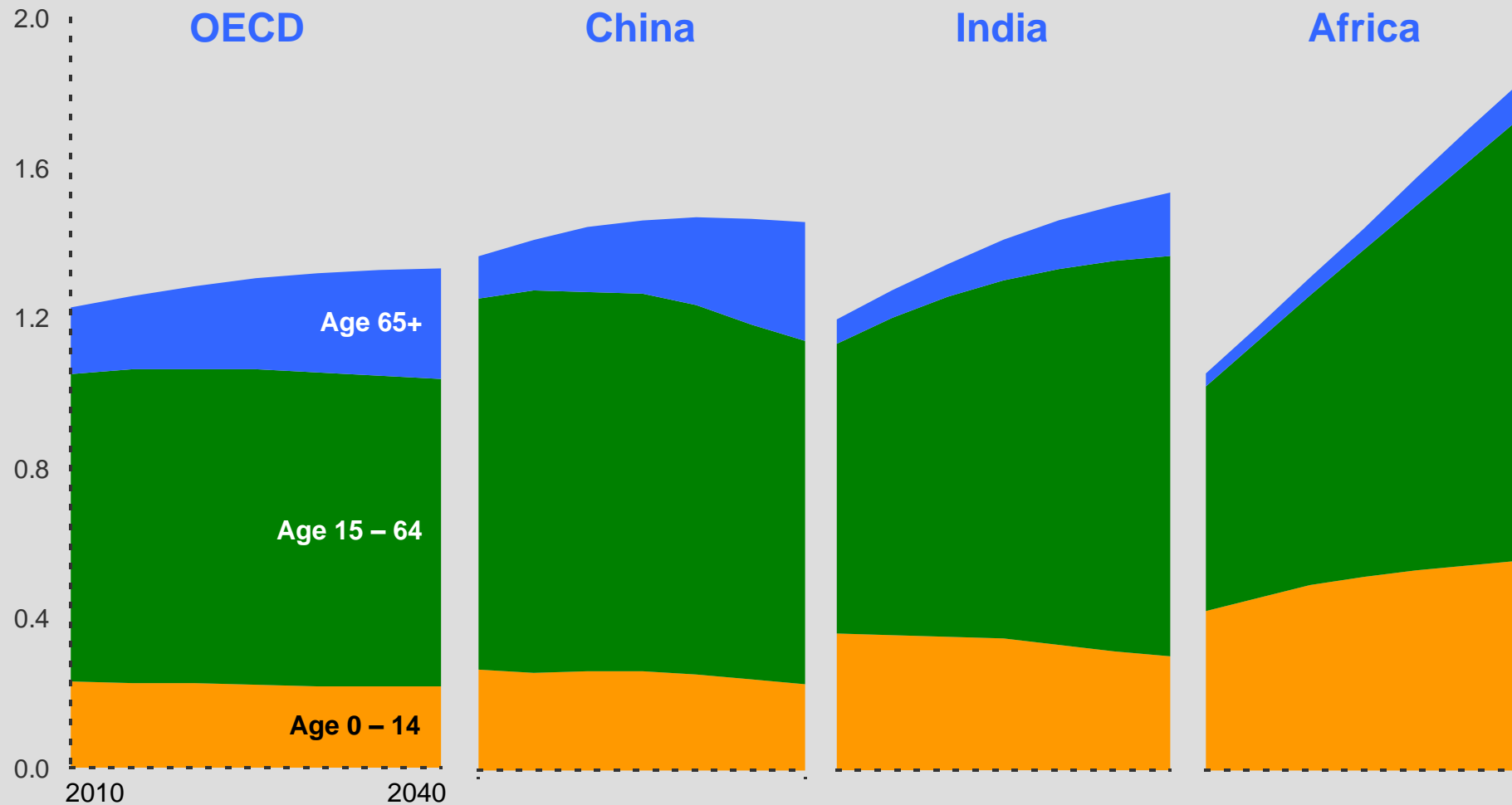
As societies and technologies develop over time...



... energy needs evolve

Demographics

Billion



Source: World Bank

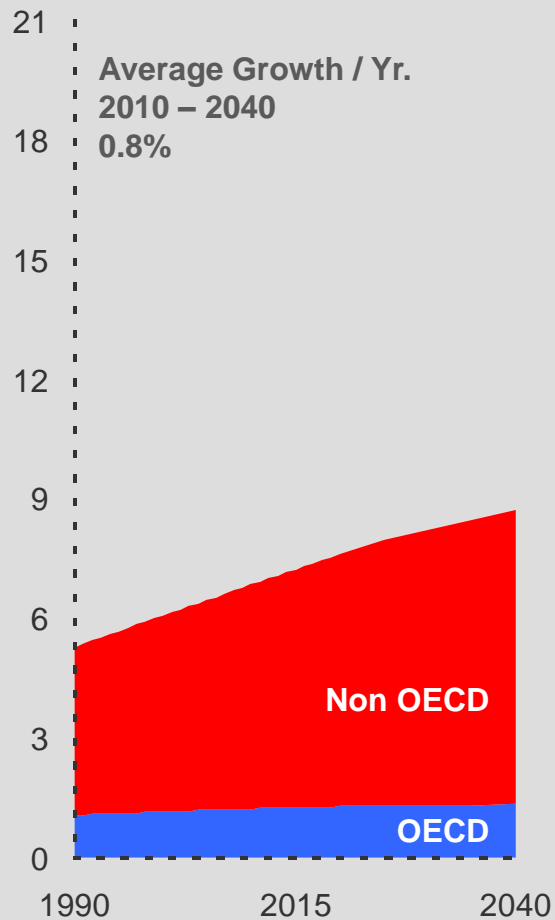
ExxonMobil 2012 Outlook for Energy

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OECD vs. non-OECD

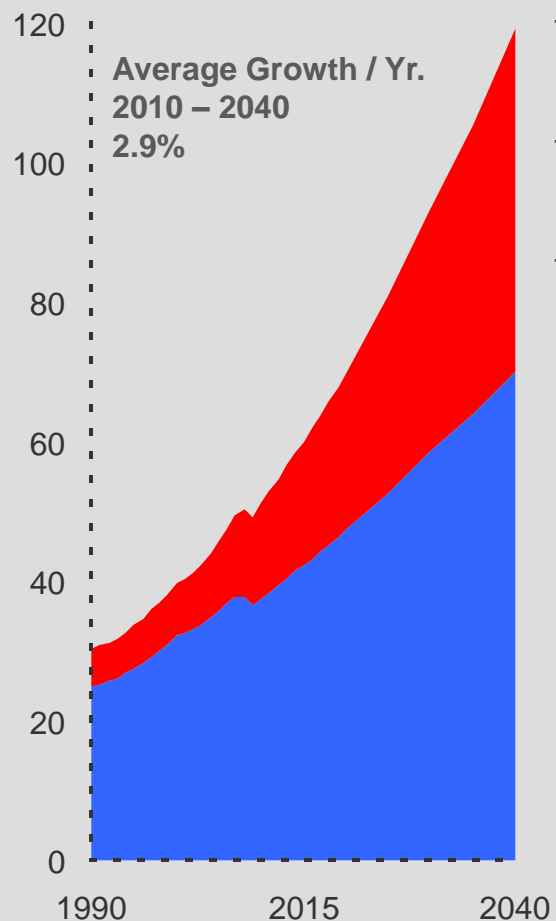
Population

Billion



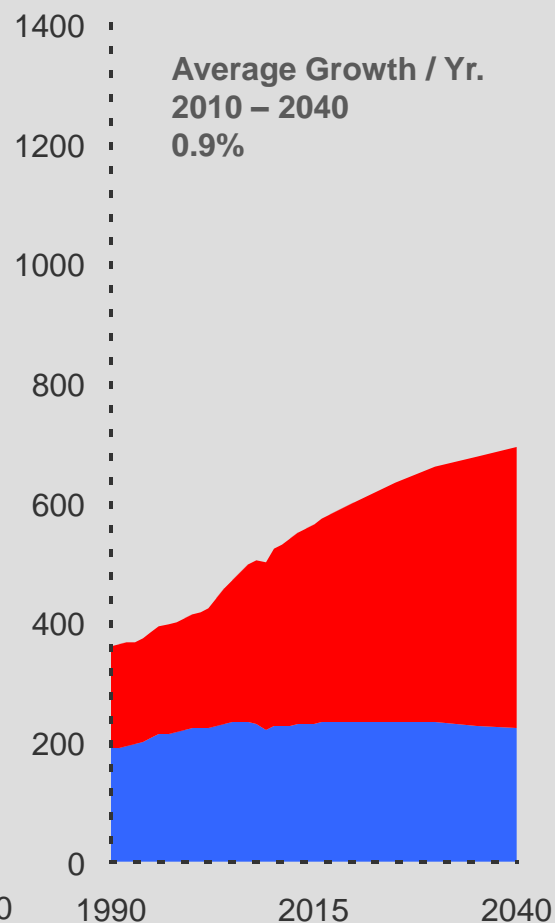
GDP

Trillion 2005\$



Energy Demand

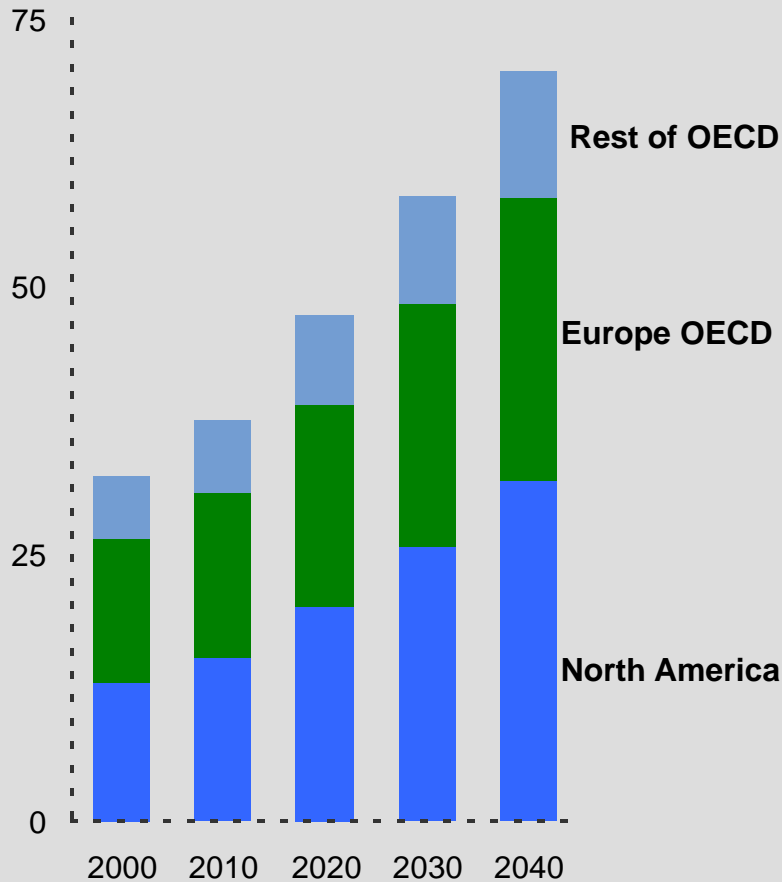
Quadrillion BTUs



OECD Activity and Demand

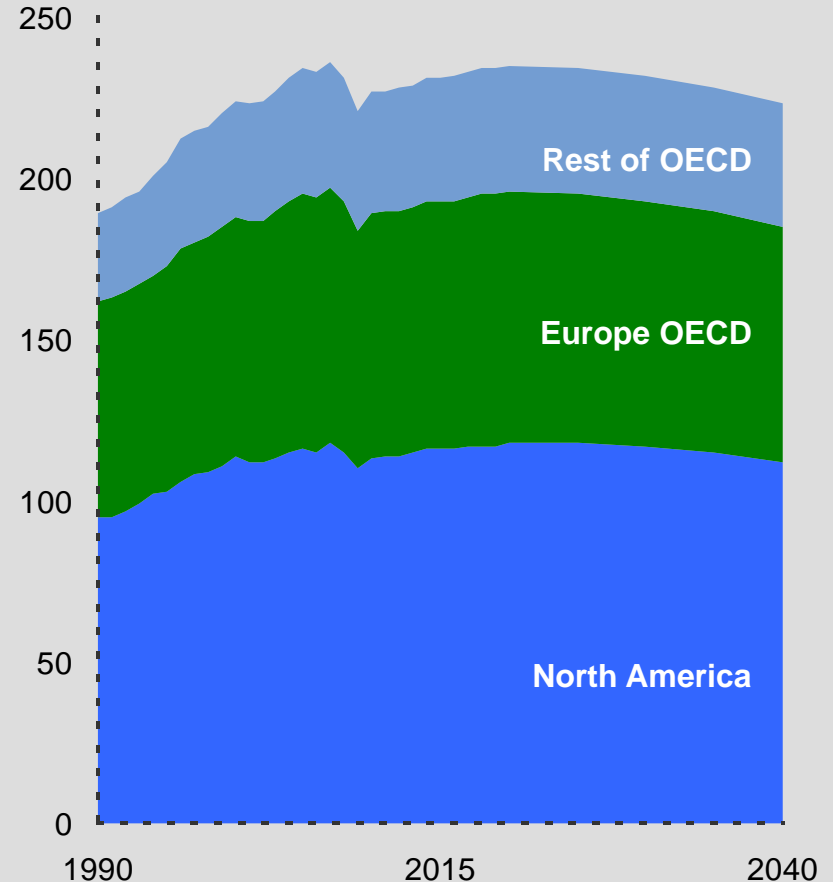
OECD GDP

Trillion 2005 \$



OECD Energy Demand

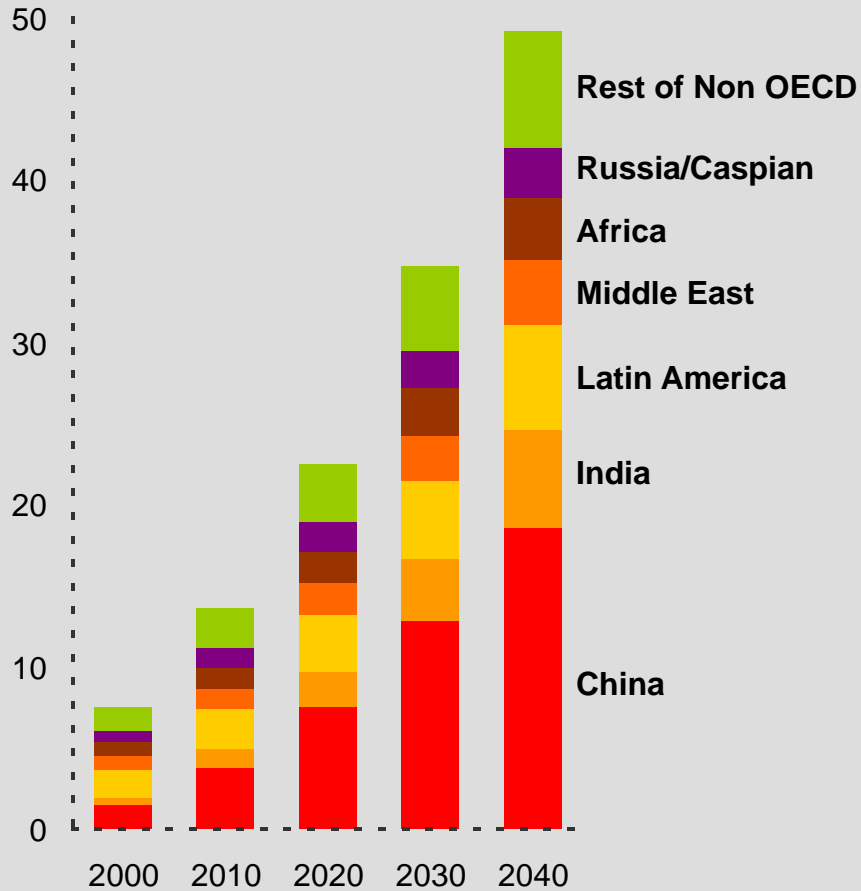
Quadrillion BTUs



Non-OECD Activity and Demand

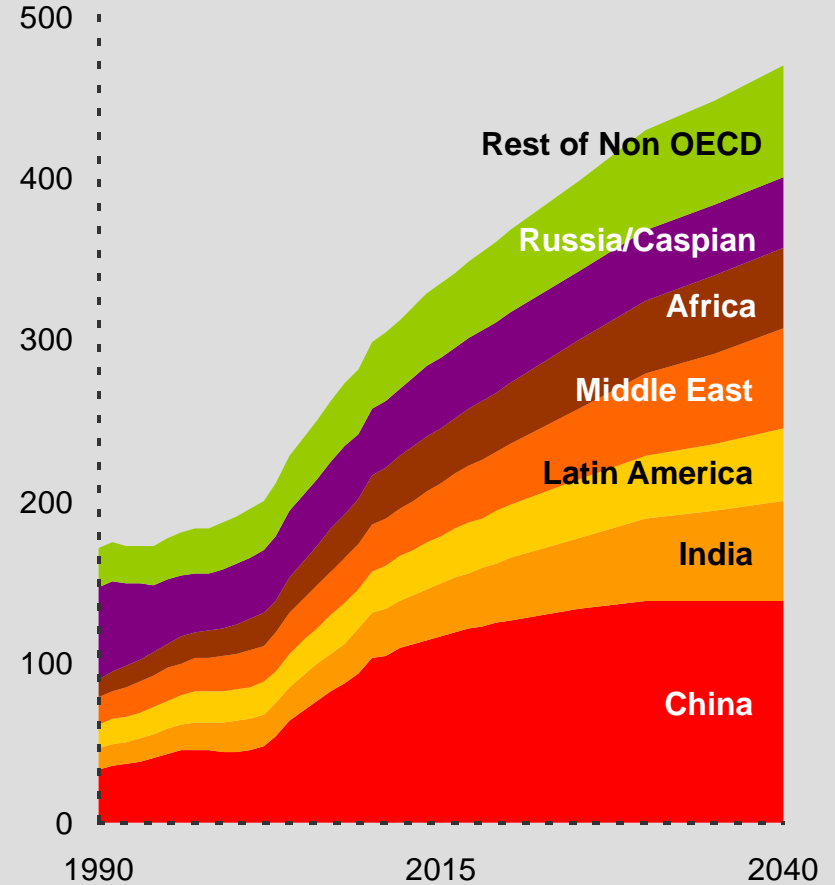
Non OECD GDP

Trillion 2005 \$



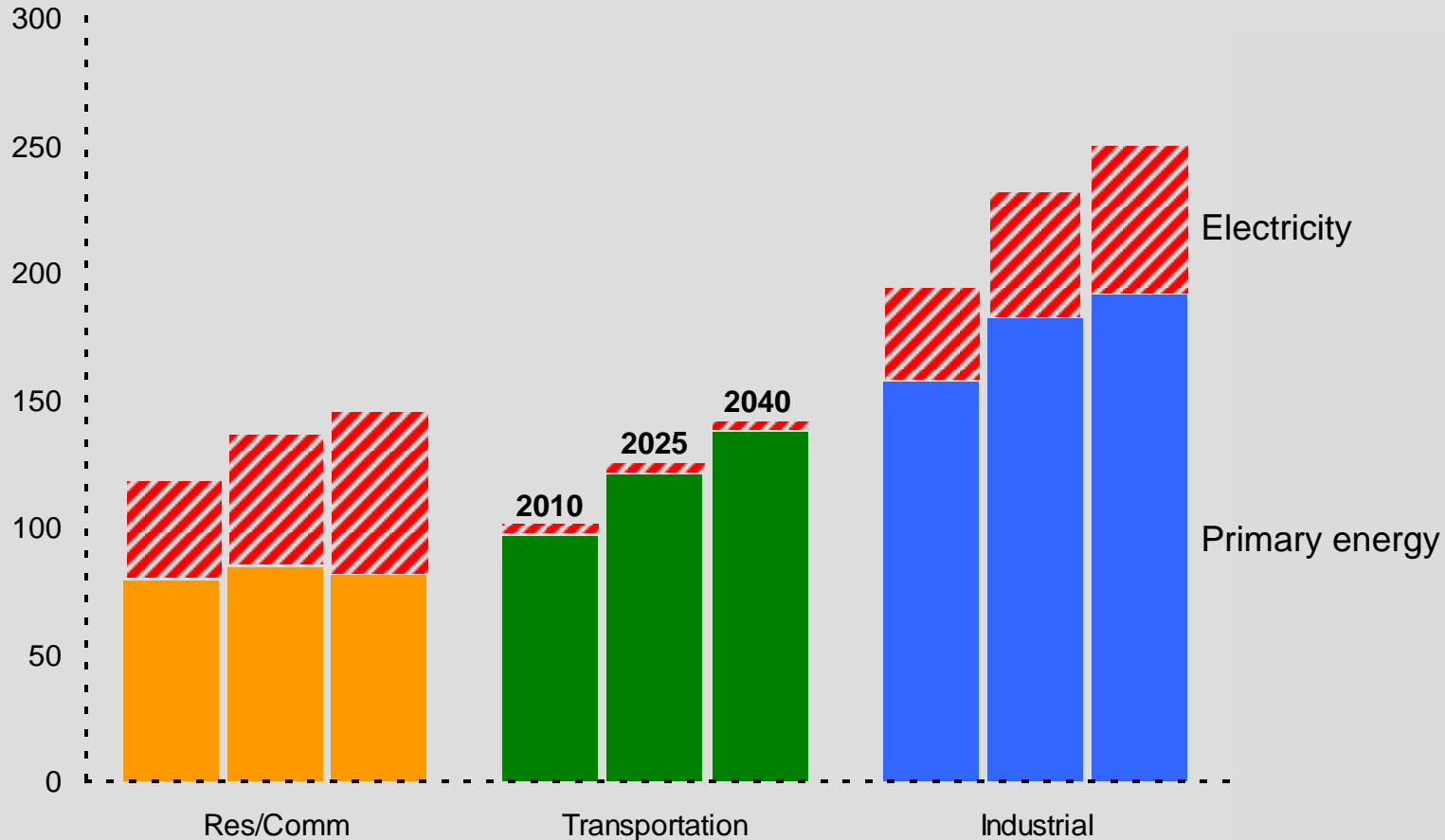
Non OECD Energy Demand

Quadrillion BTUs



Primary Energy Demand by Sector

Quadrillion BTUs



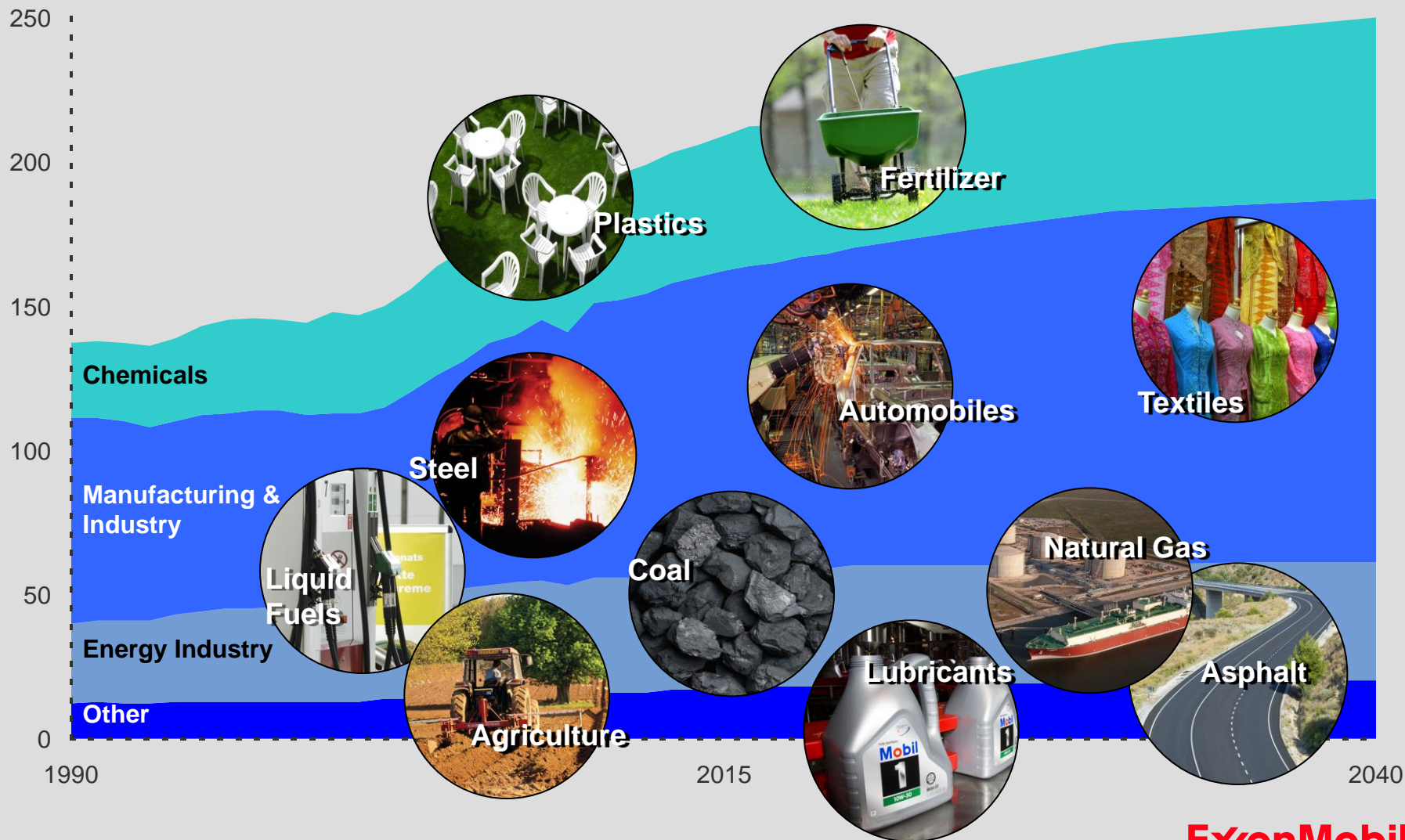
Industrial



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Industrial Energy Demand

Quadrillion BTUs

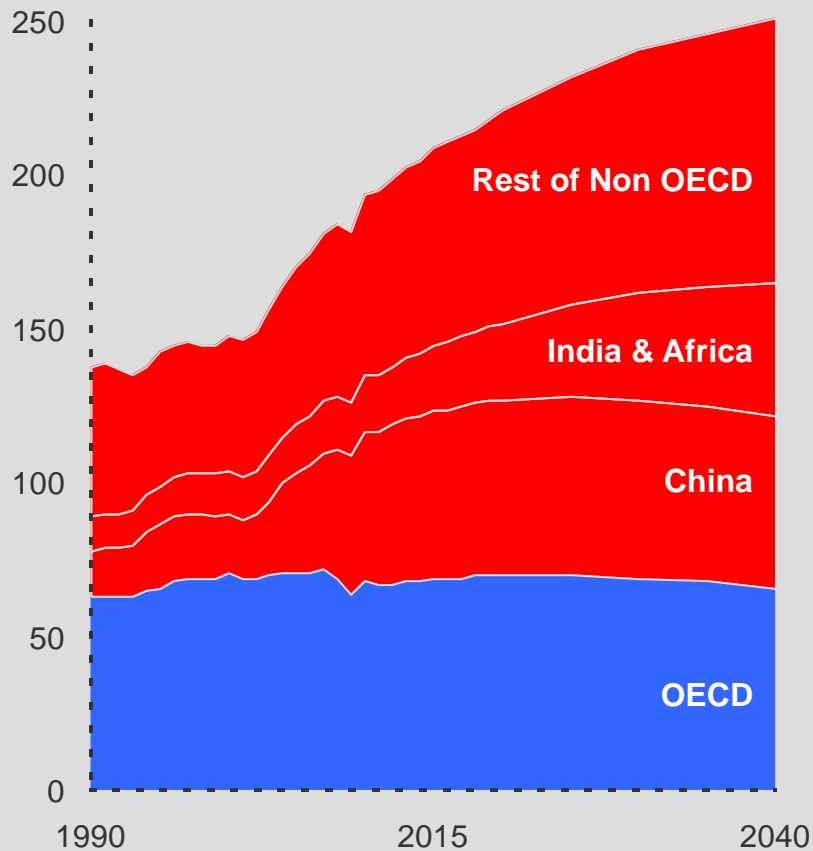


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Industrial Energy

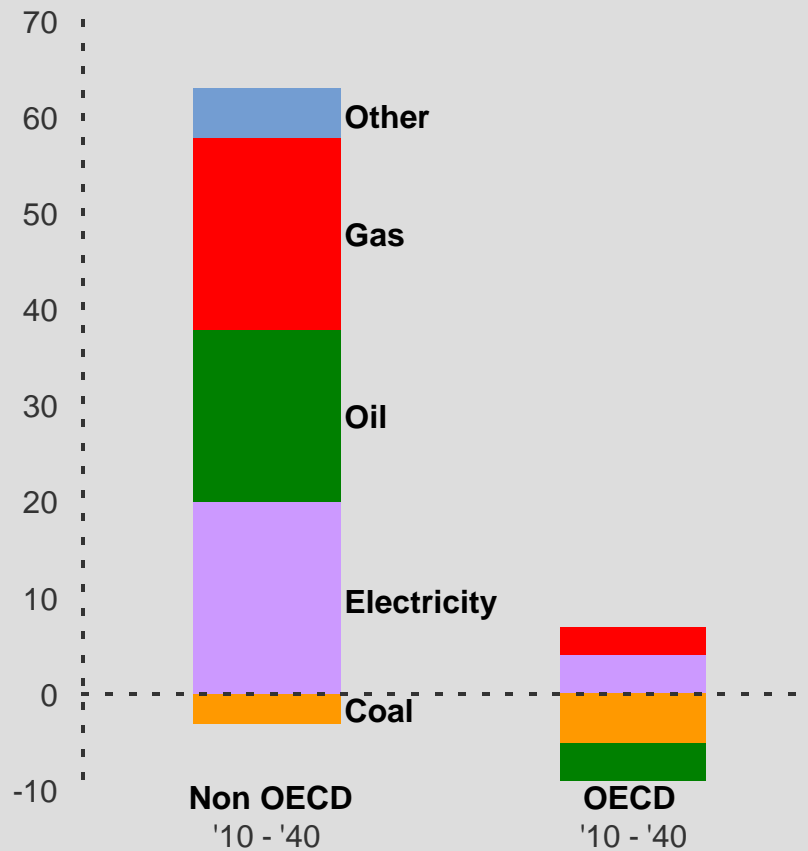
By Region

Quadrillion BTUs



Fuel Growth

Quadrillion BTUs



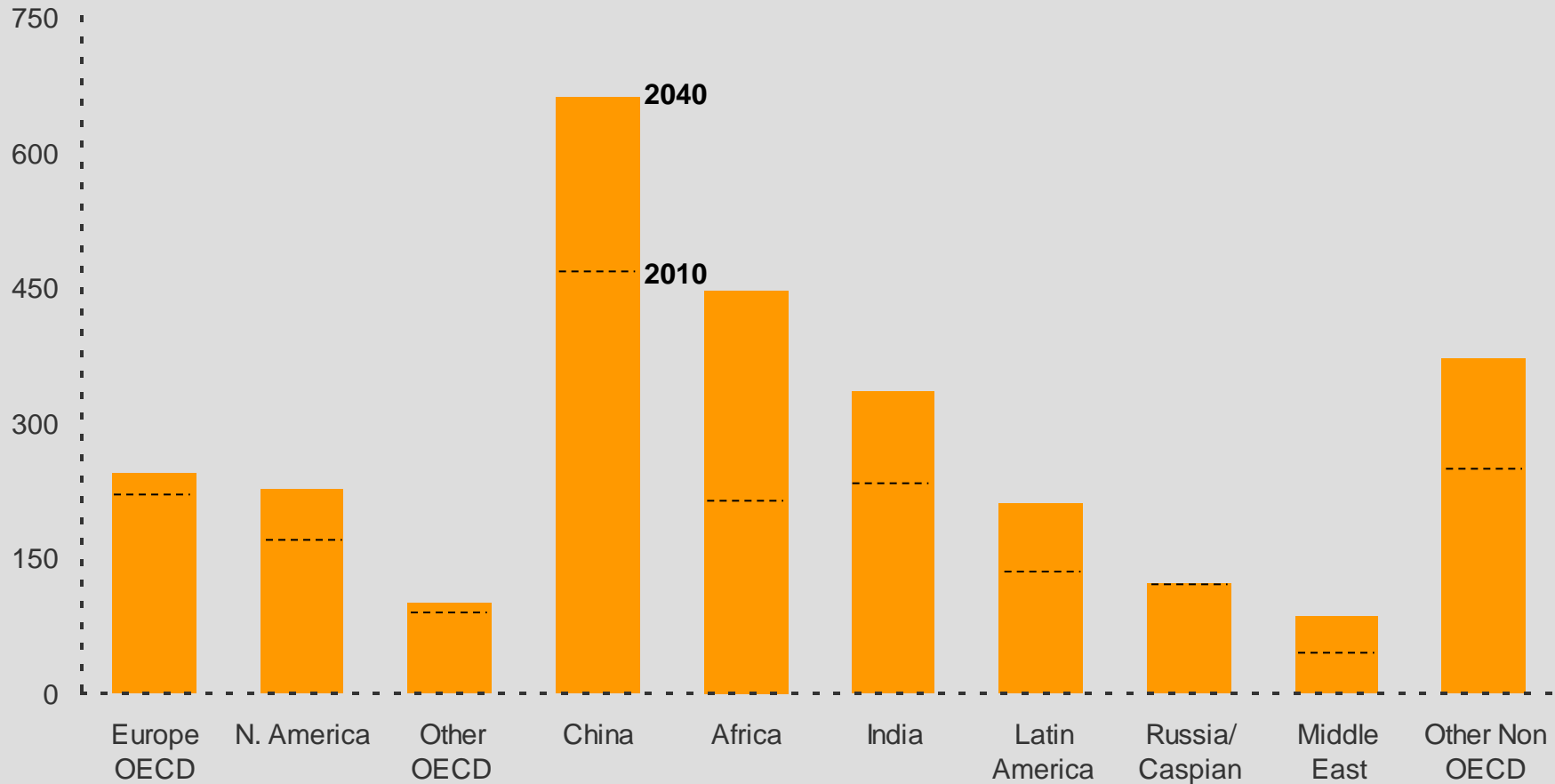
Residential / Commercial



Household Growth

2040

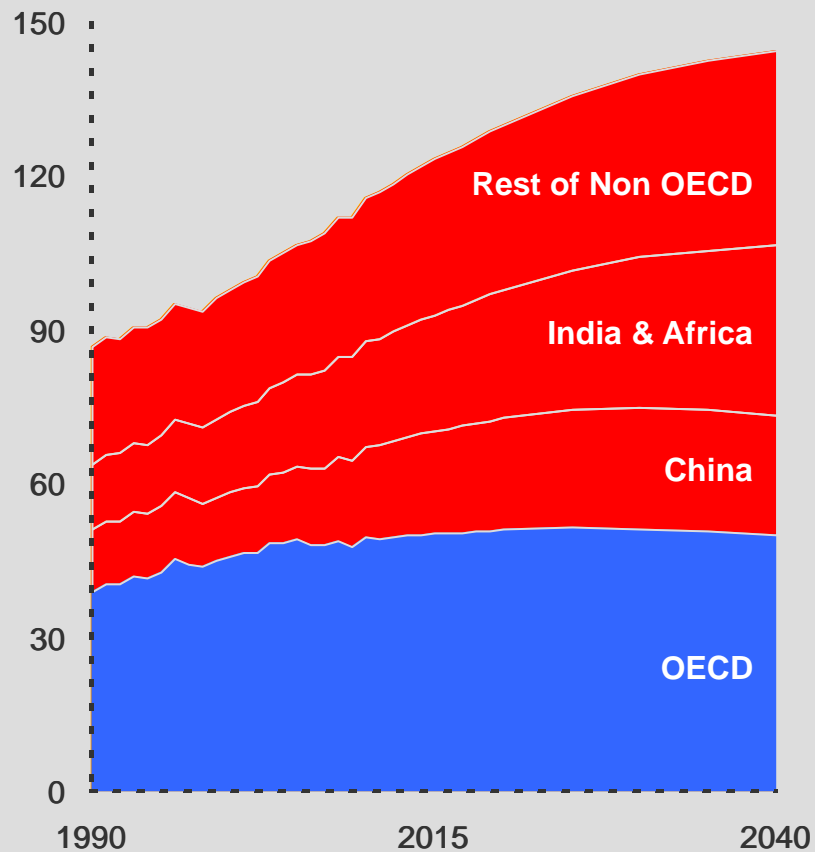
Million Households



Residential/Commercial

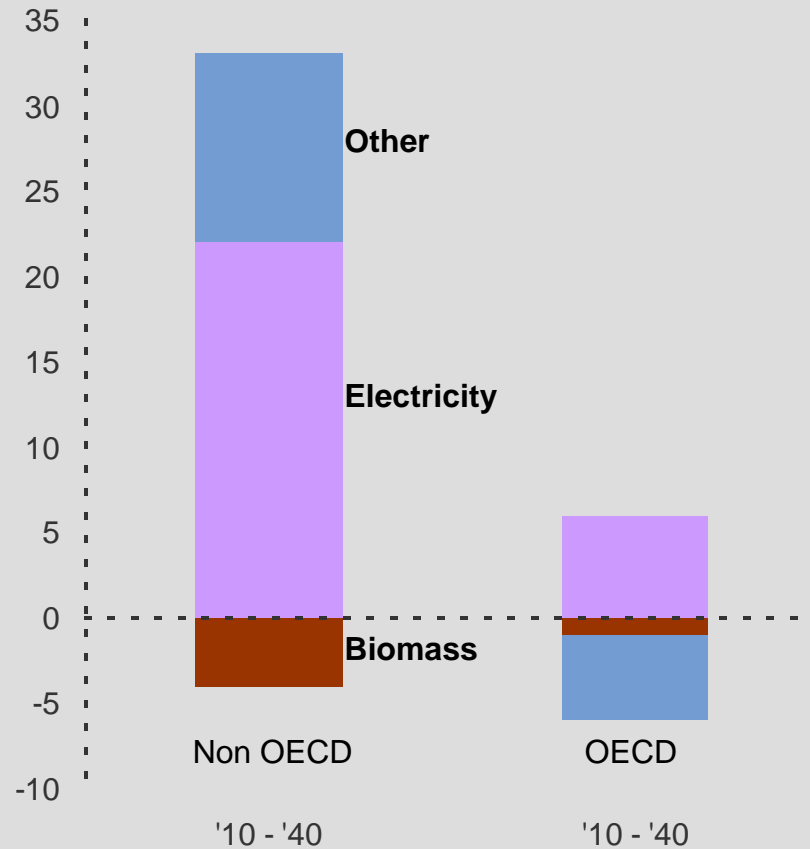
By Region

Quadrillion BTUs



Fuel Growth

Quadrillion BTUs



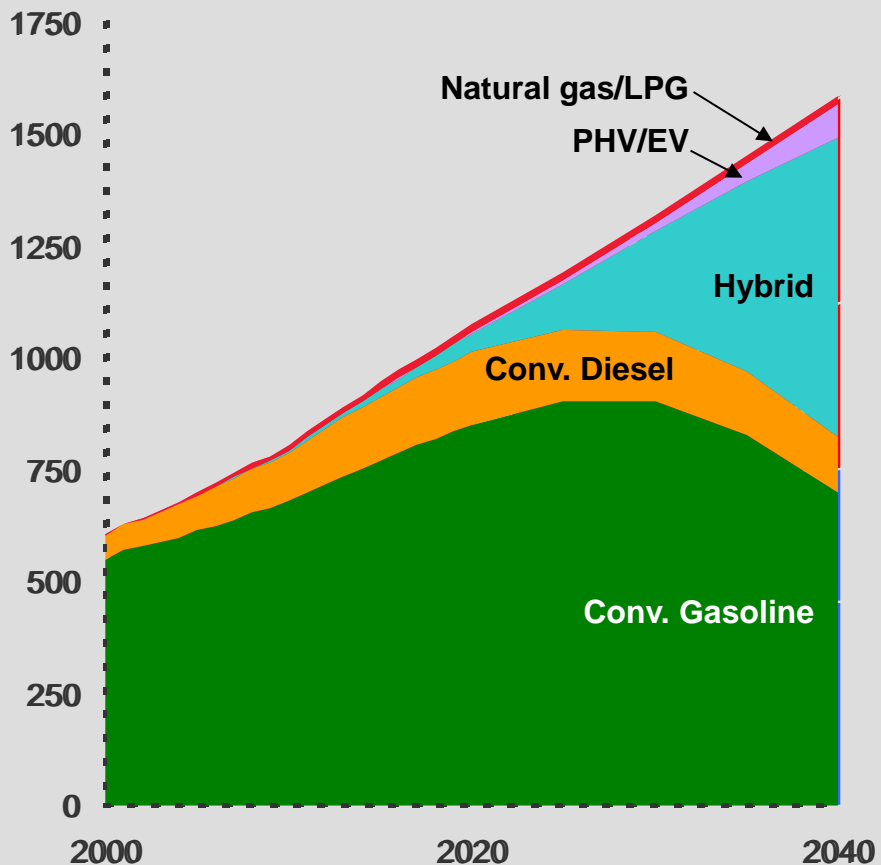
Transportation



Light Duty Fleet and Efficiency

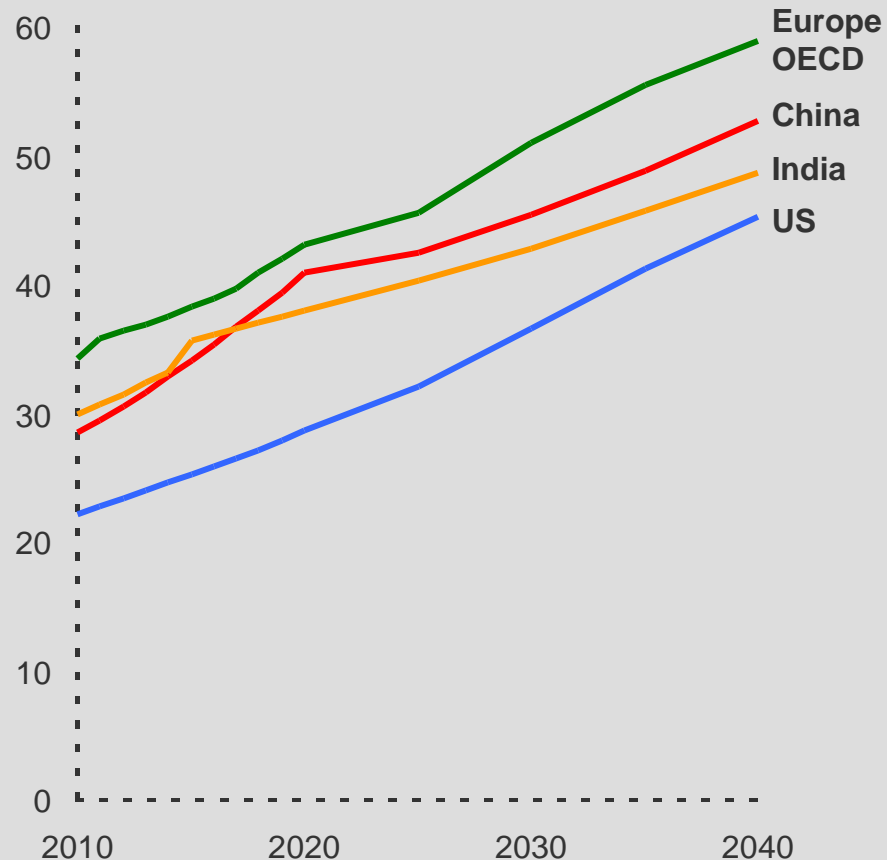
Light Duty Vehicle Fleet by Region

Million Vehicles



Average New Car

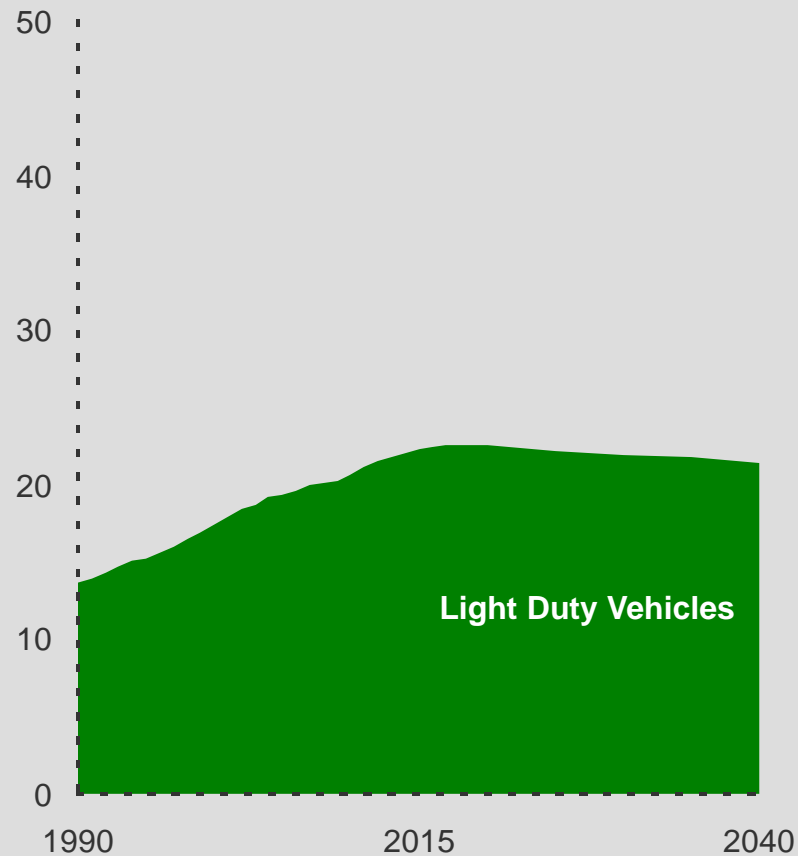
Miles per Gallon



Transportation Energy Demand

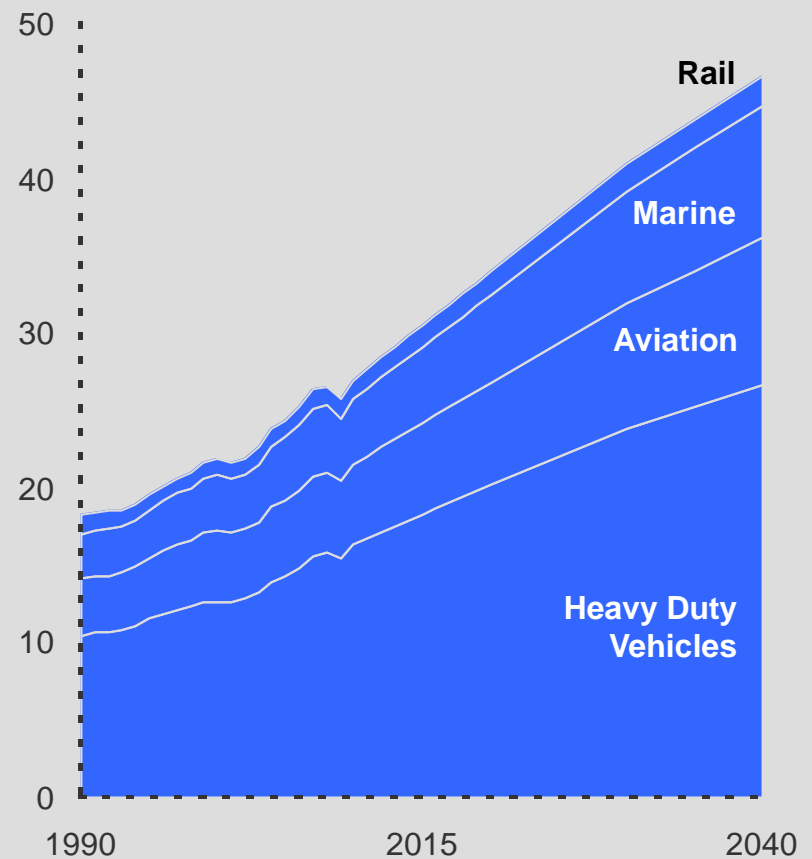
Personal

MBDOE



Commercial

MBDOE





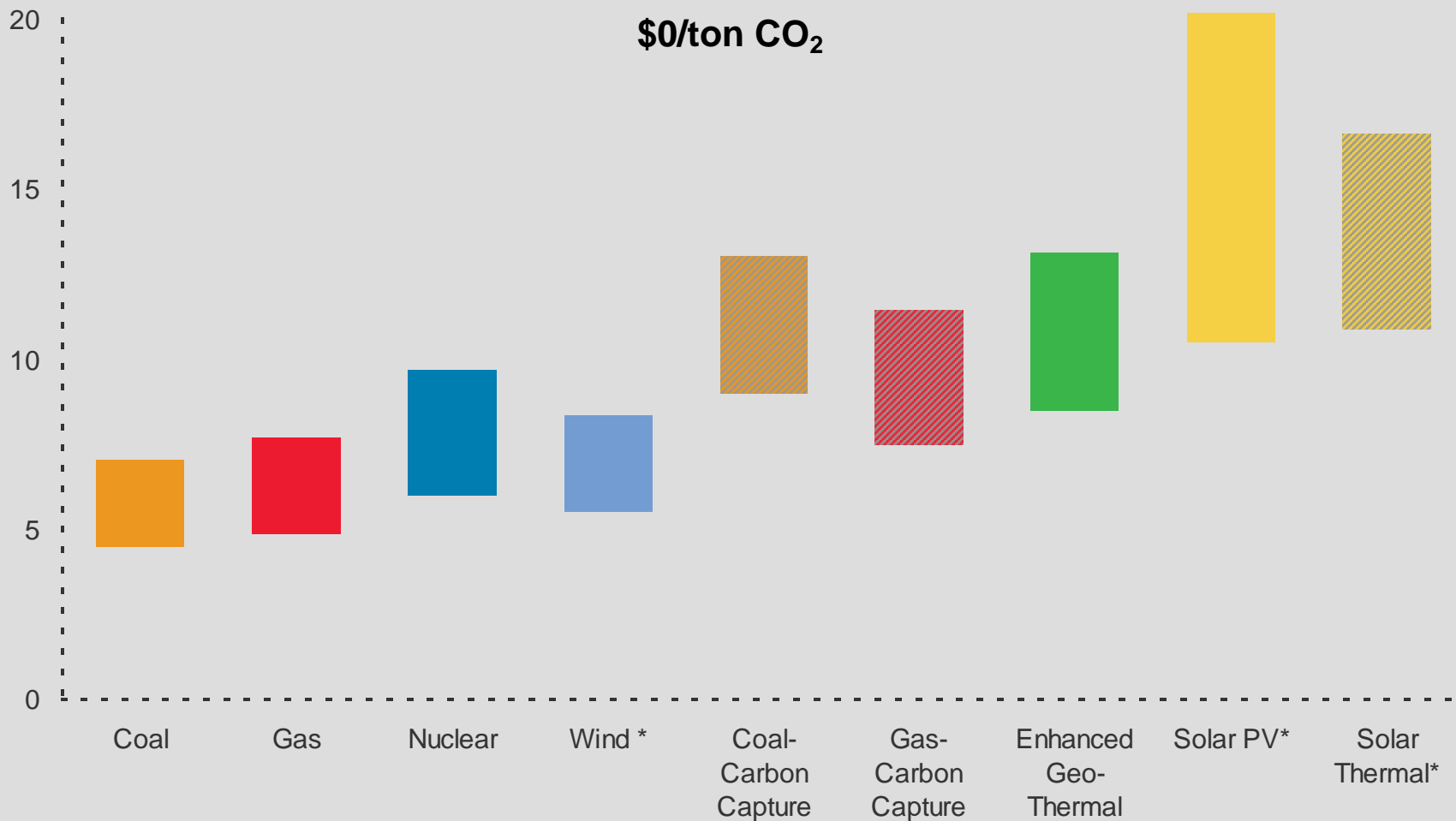
Electricity Generation

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Choices for U.S. Electricity

Baseload, Startup 2030

2011 cents/kWh



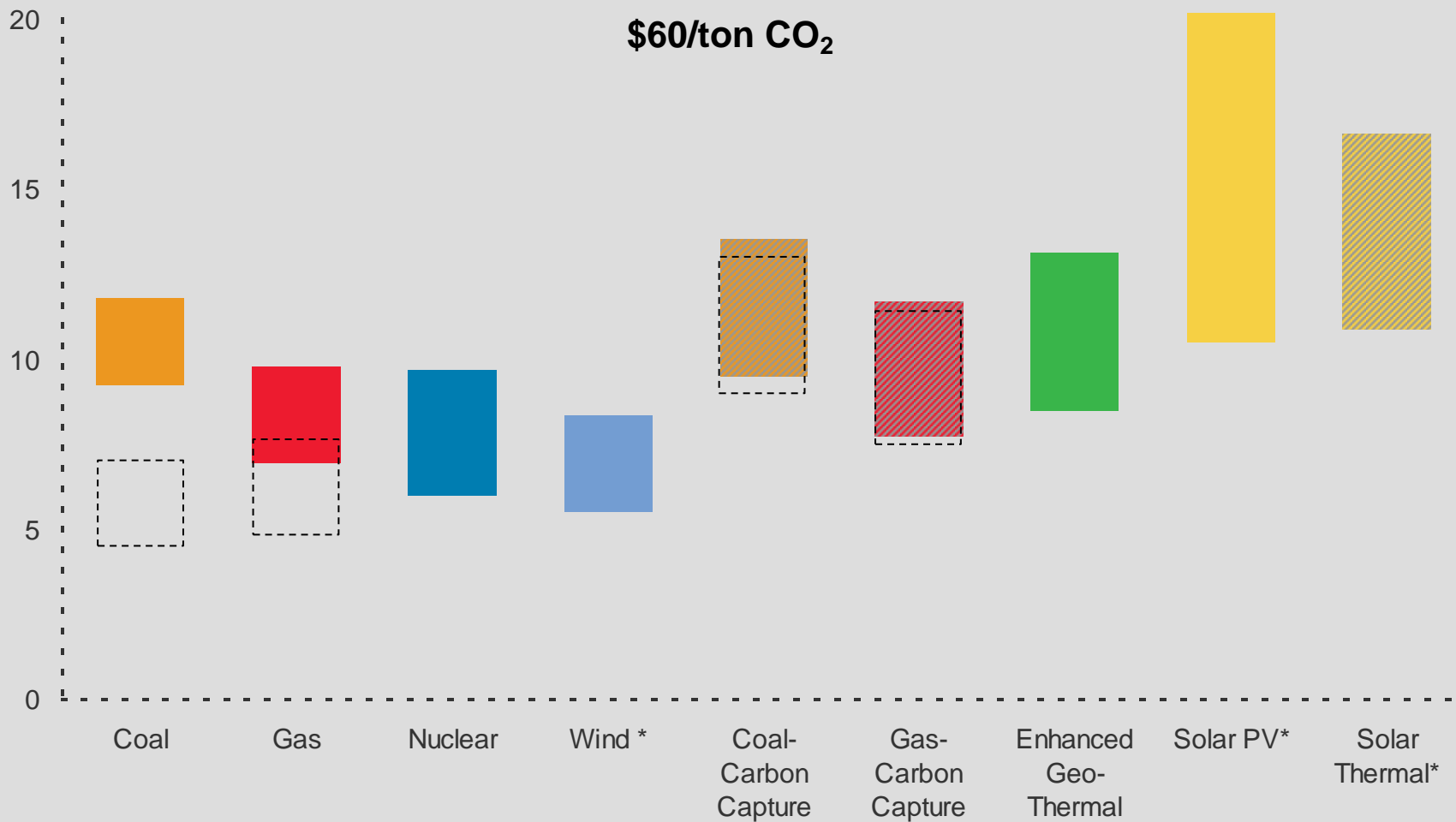
*Wind and solar exclude costs for backup capacity and additional transmission

ExxonMobil

Choices for U.S. Electricity

Baseload, Startup 2030

2011 cents/kWh



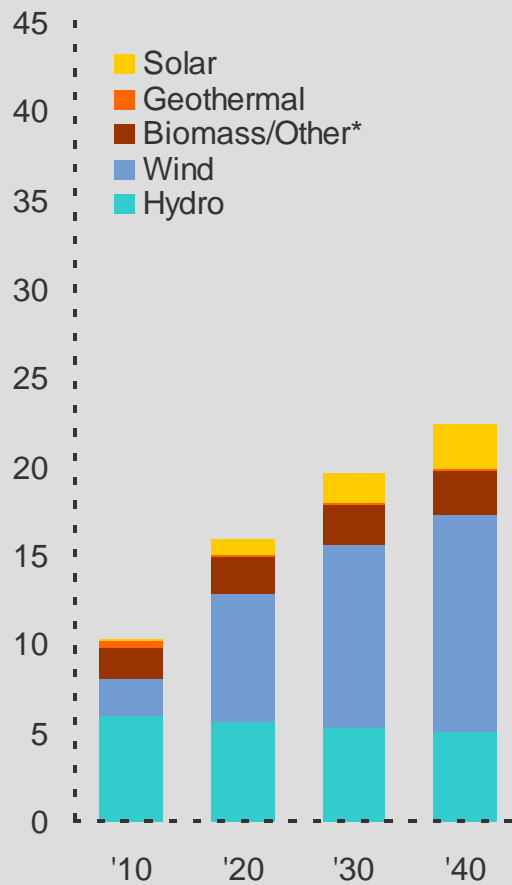
*Wind and solar exclude costs for backup capacity and additional transmission

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Renewable Electricity

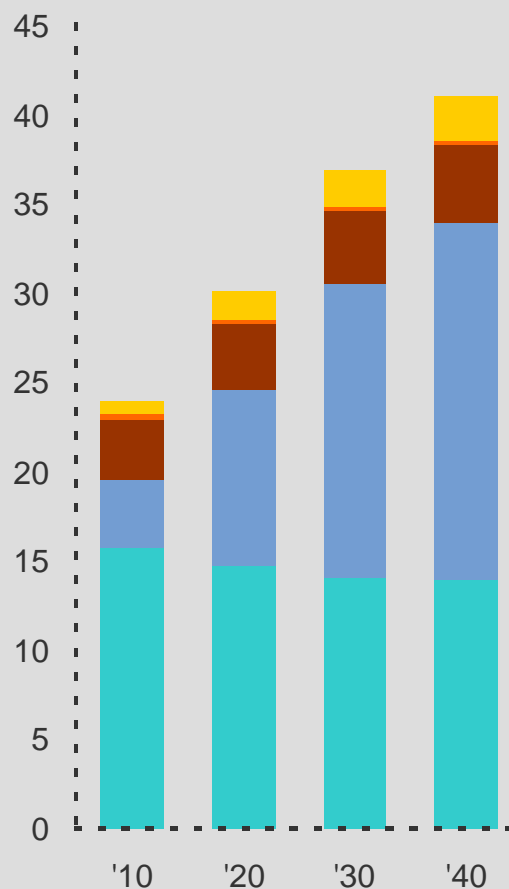
United States

Percent of TWh



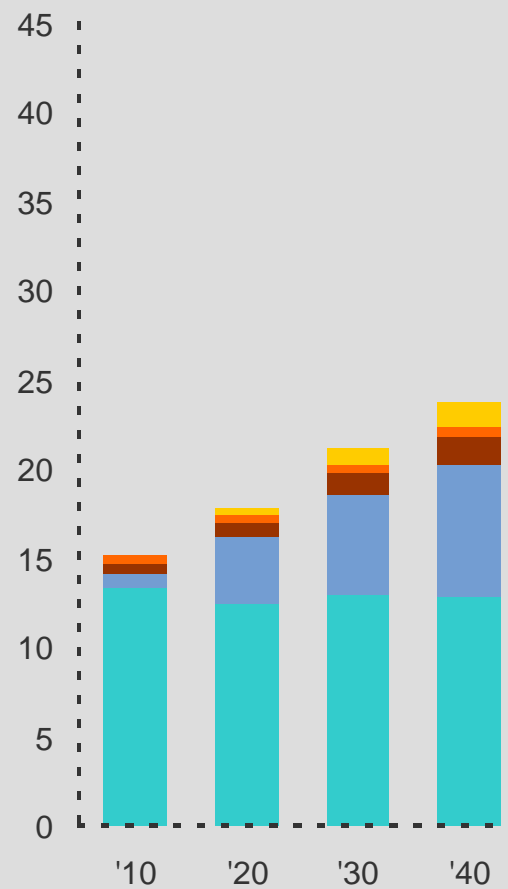
Europe

Percent of TWh



Asia Pacific

Percent of TWh

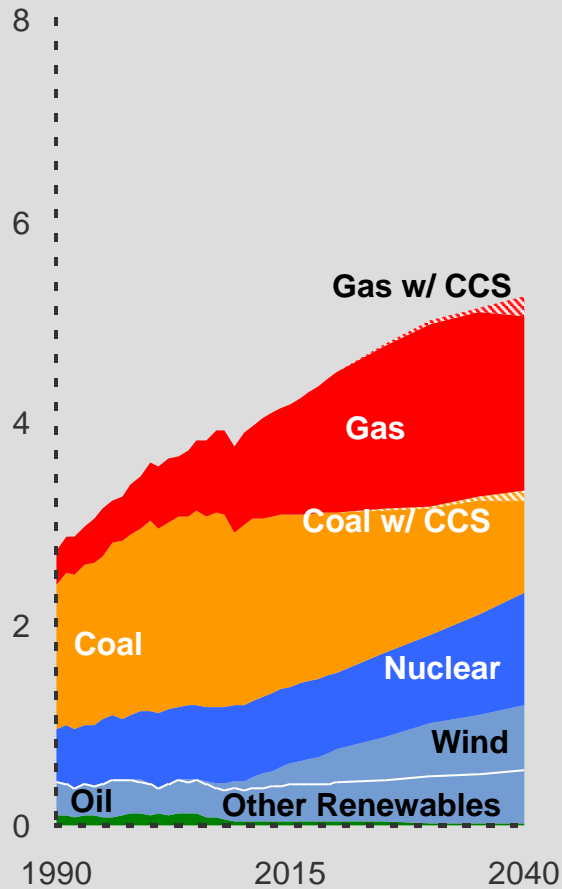


*Biomass includes Municipal Solid Waste

Fuels for Electricity

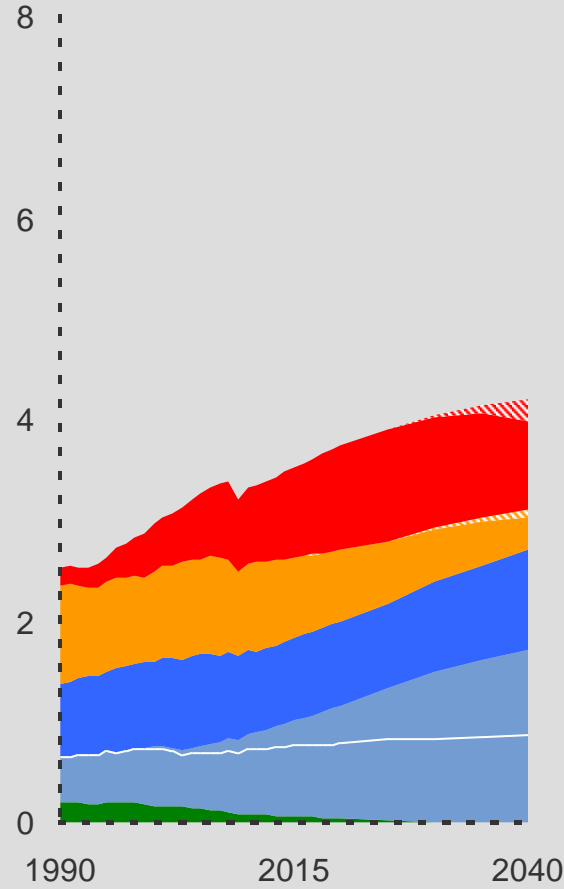
United States

k TWh



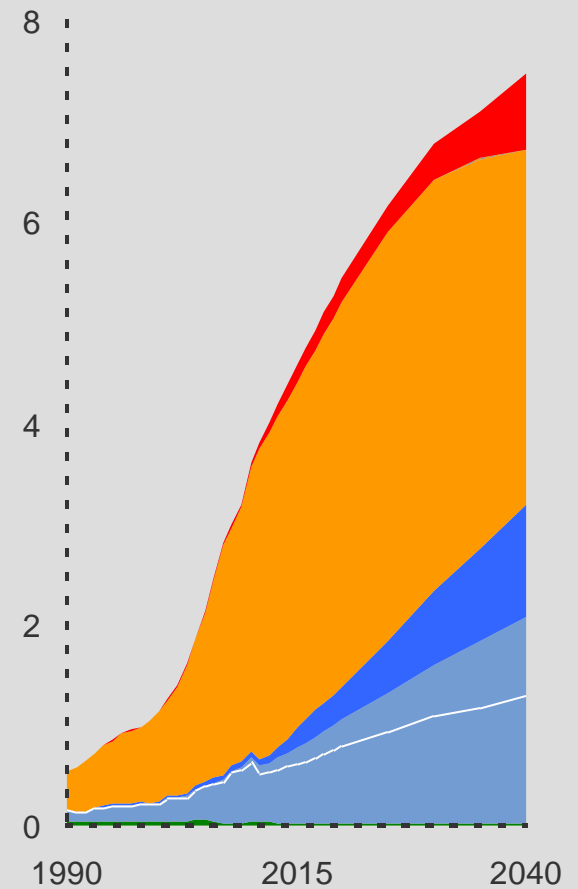
Europe

k TWh



China

k TWh



* Generation by Type

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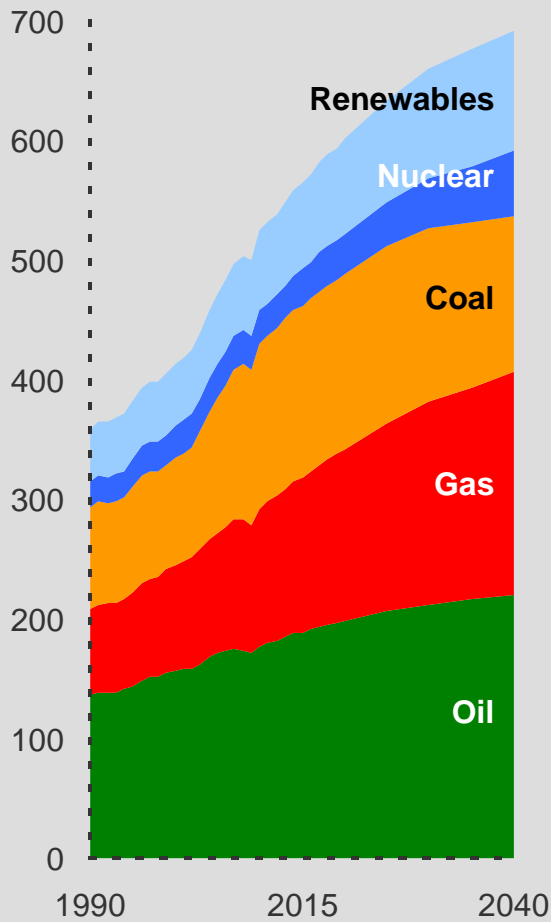
Supply



Diverse Fuel Mix

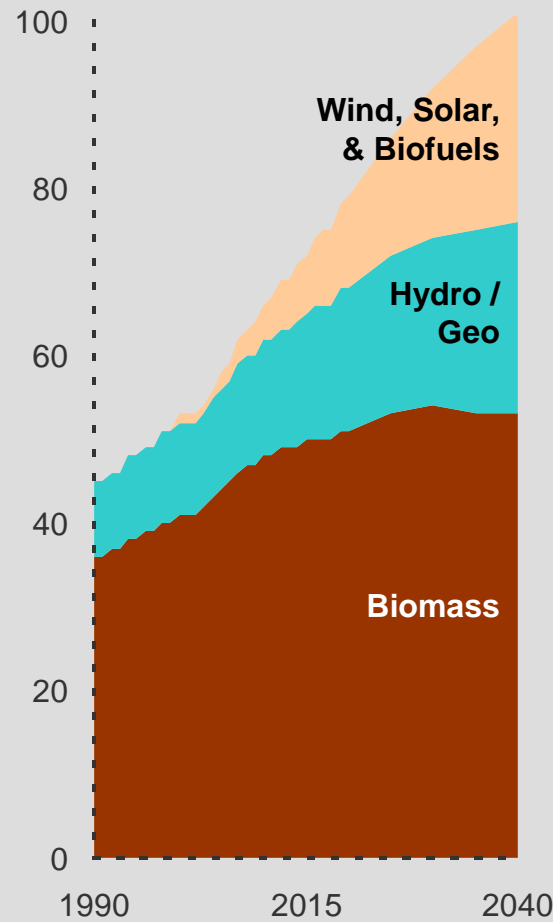
Primary Energy

Quadrillion BTUs



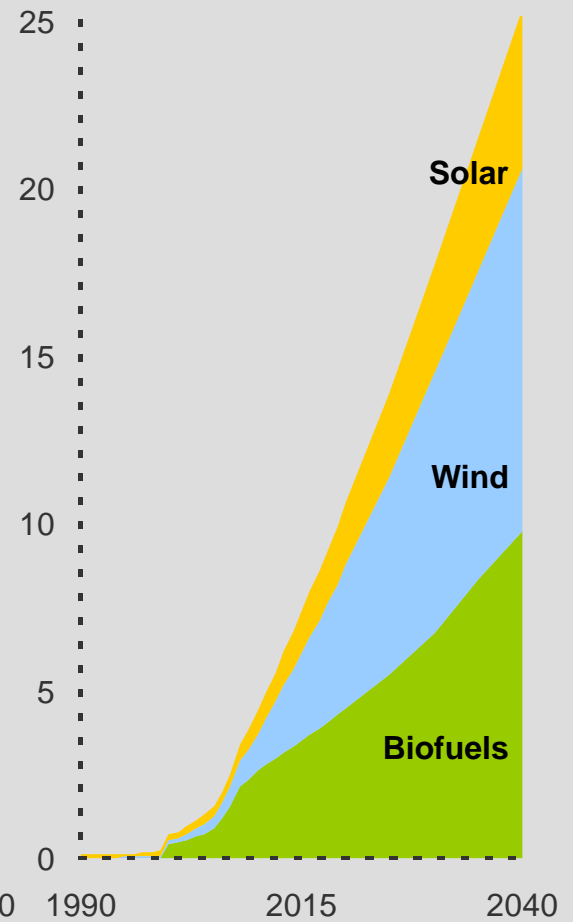
Renewables

Quadrillion BTUs



Wind, Solar, & Biofuels

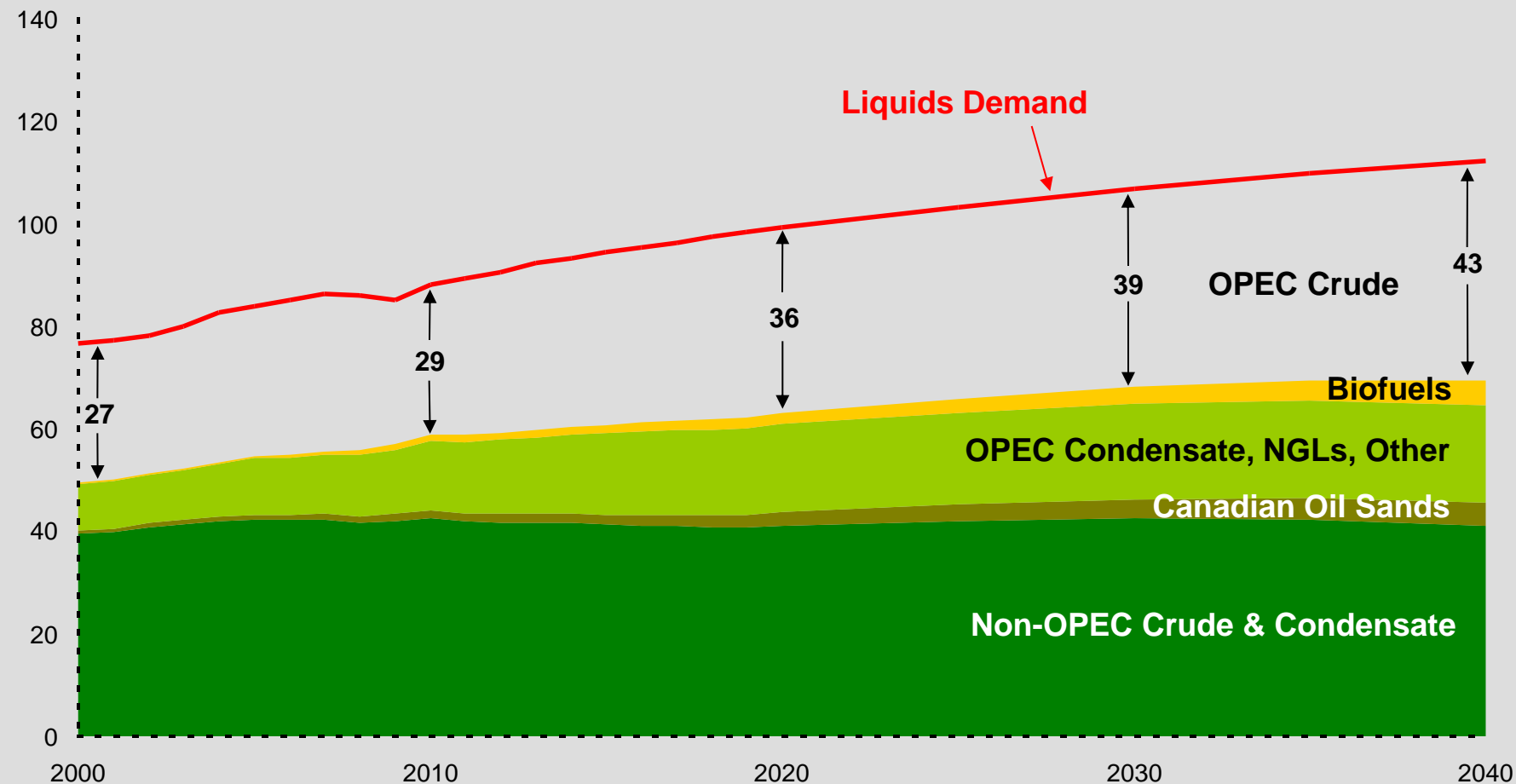
Quadrillion BTUs



Liquids Supply Outlook

Liquids Supply

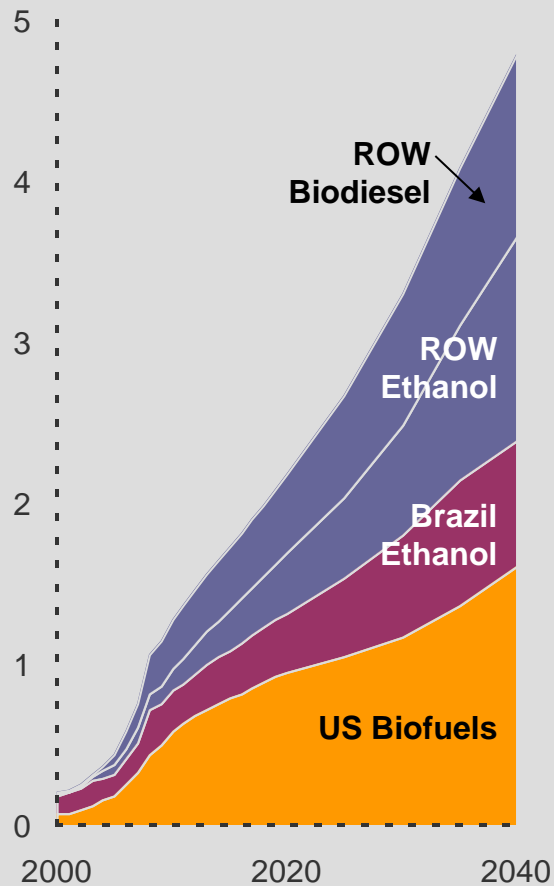
MBDOE



Biofuels

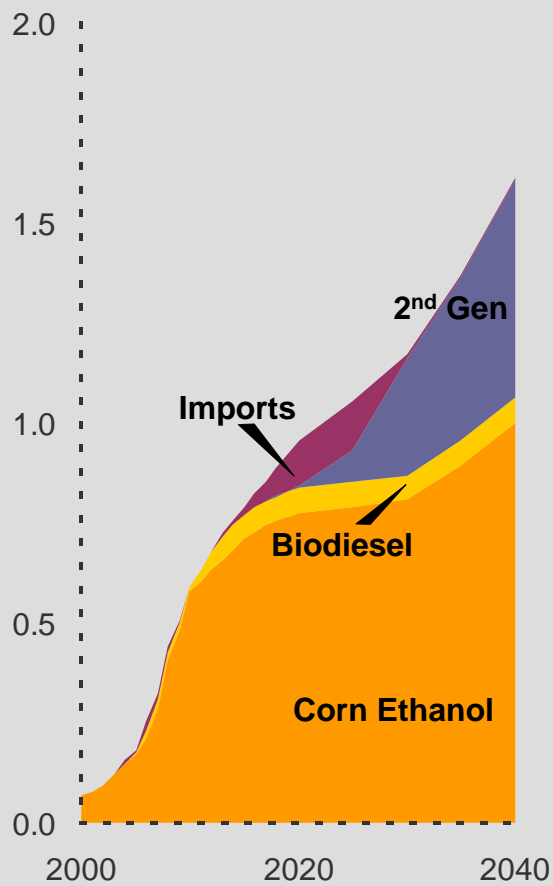
Production

MBDOE



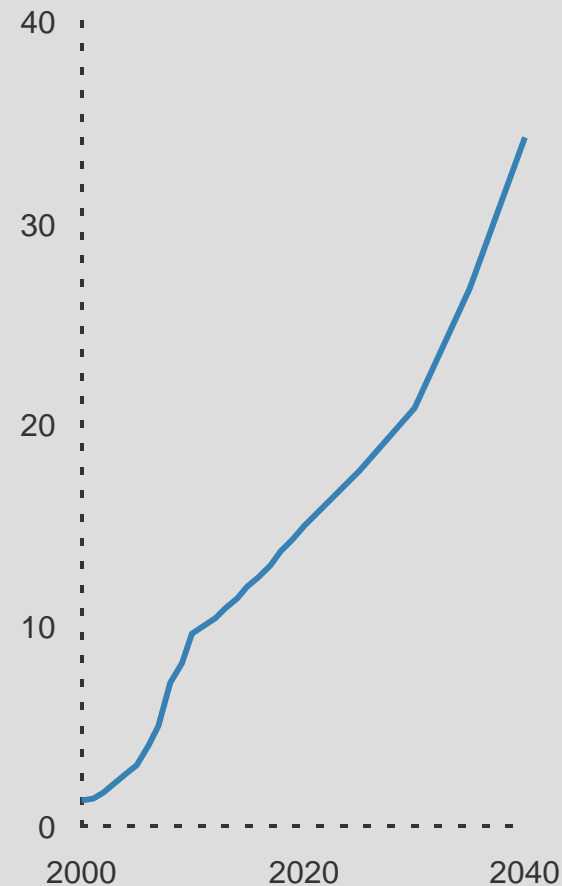
US Supply

MBDOE



US Ethanol vs. Gasoline

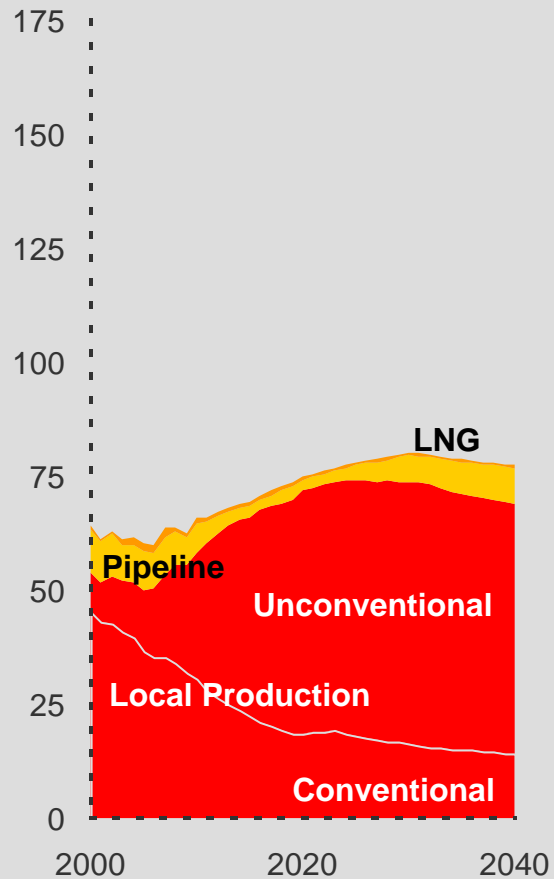
% Volume



Gas Supply

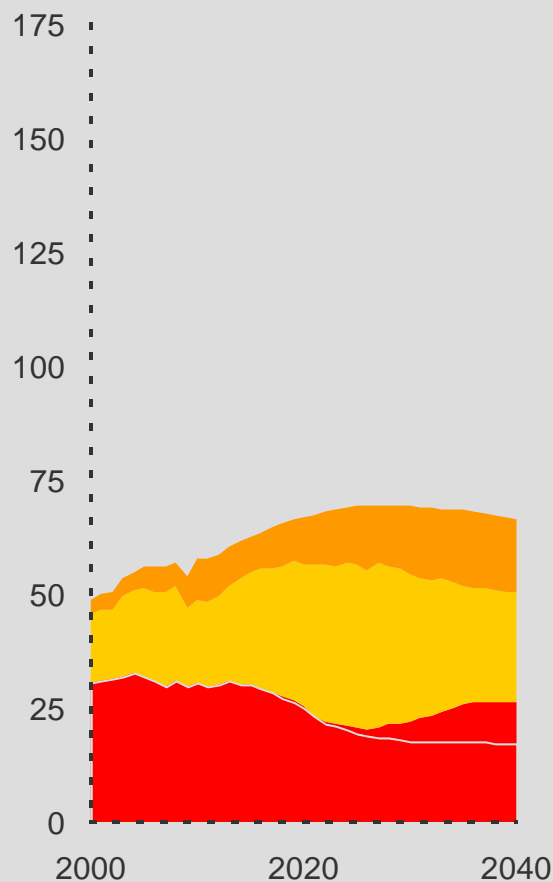
United States

BCFD



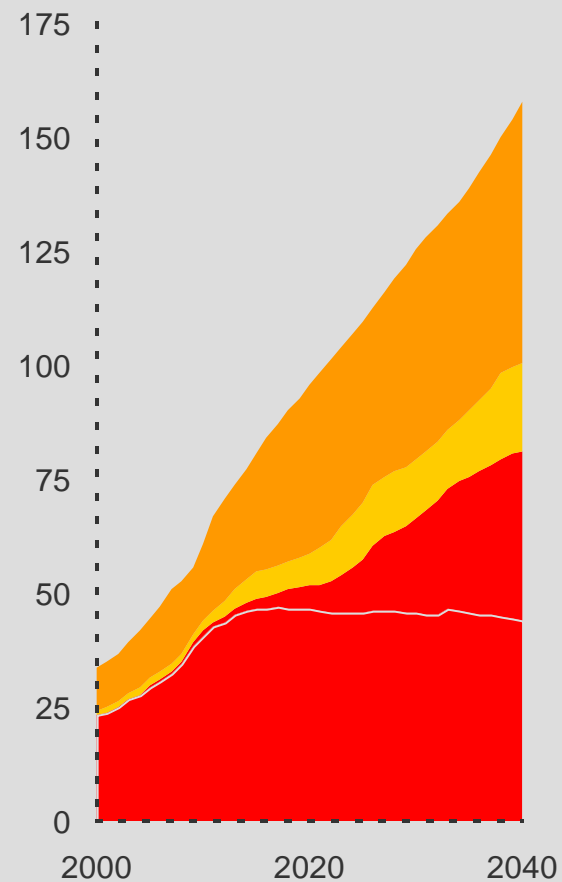
Europe

BCFD



Asia Pacific

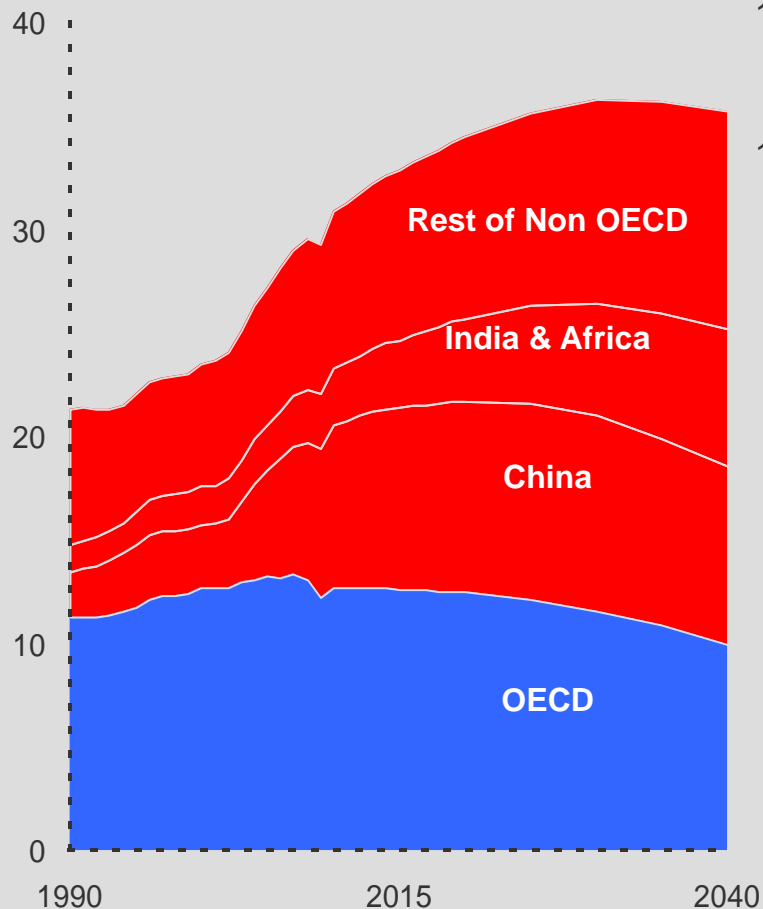
BCFD



Energy-Related CO₂ Emissions

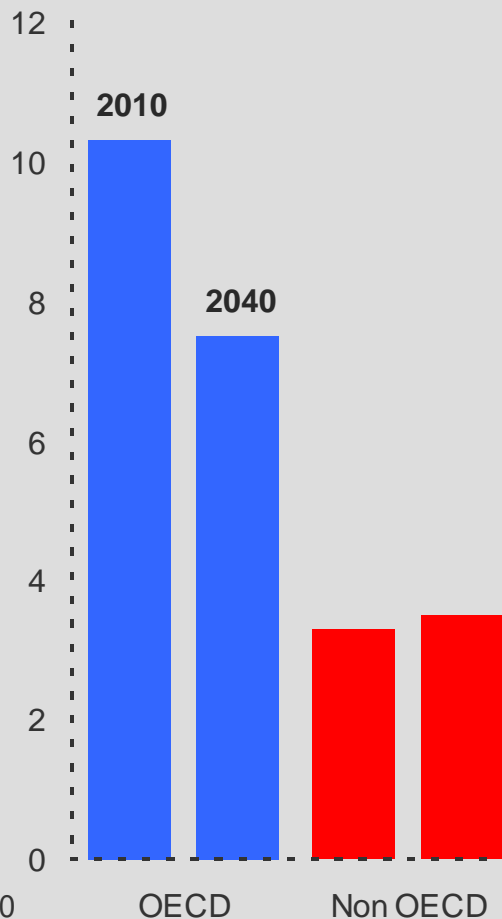
By Region

Billion Tons



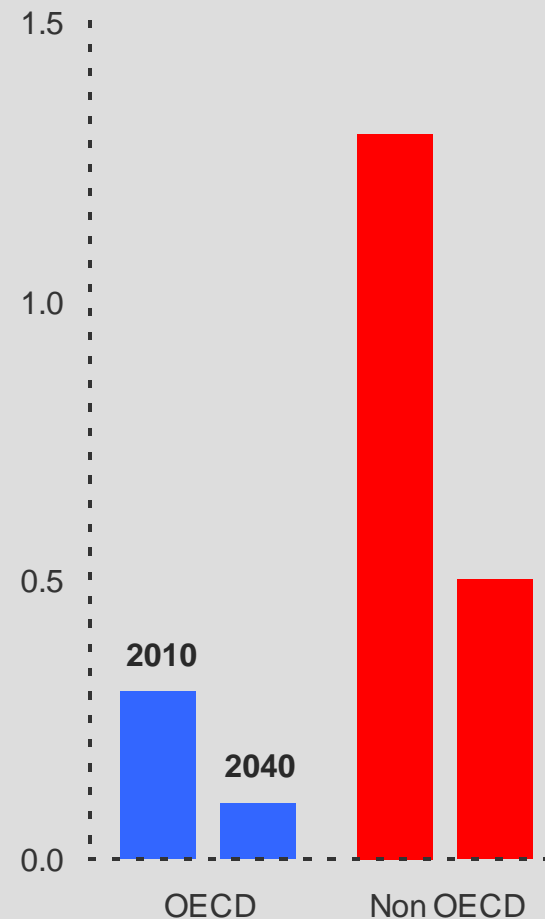
Emissions per Capita

Tons / Person

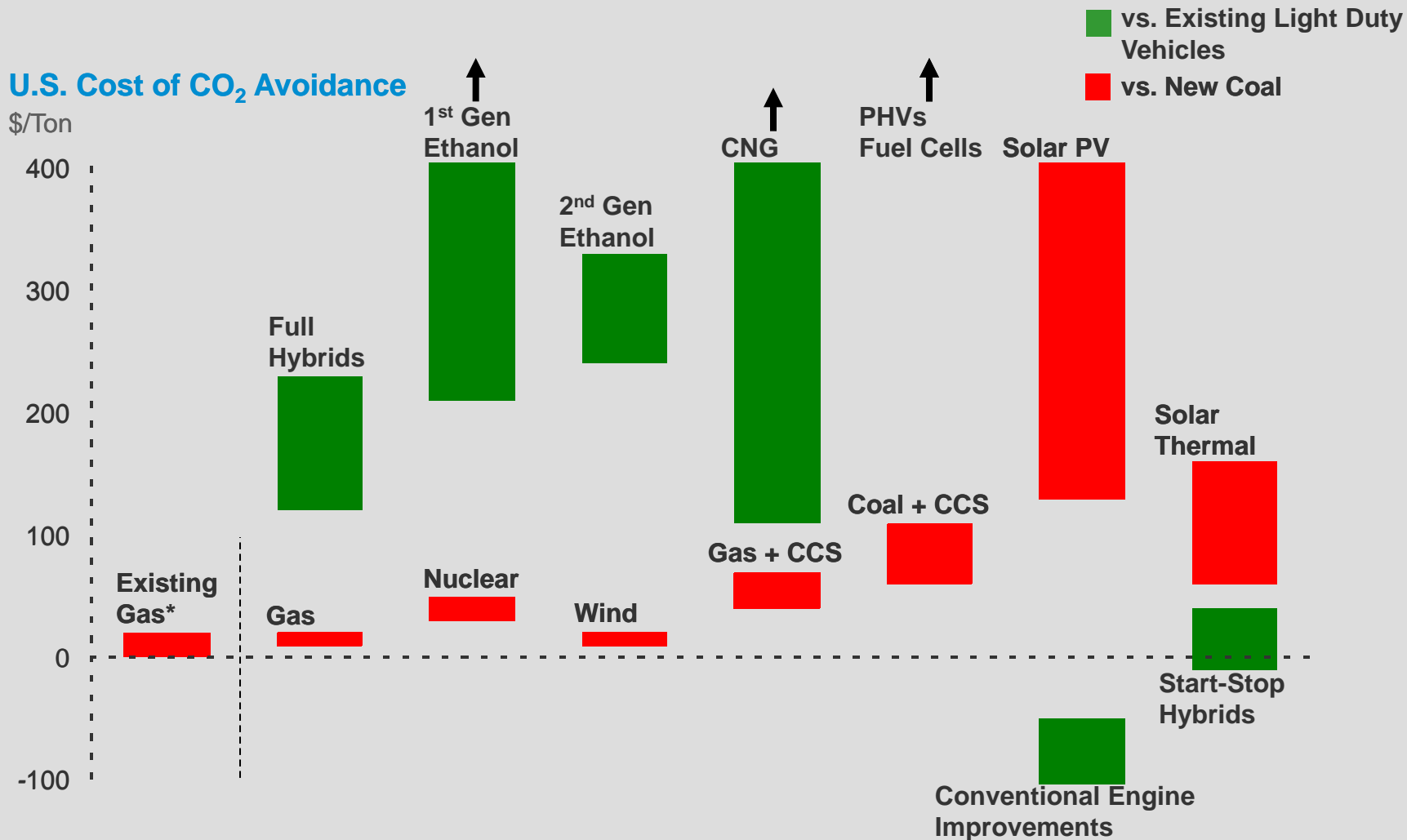


Emissions per GDP

Tons / 2005\$ k GDP



CO₂ Abatement Economics



*Higher utilization of existing gas vs. existing coal

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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