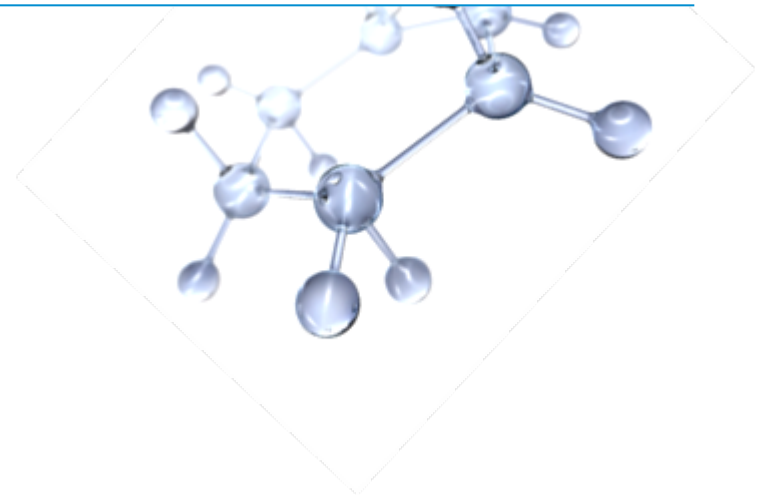


**ExxonMobil**

Taking on the world's toughest energy challenges.™

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# The Outlook for Energy a view to 2030

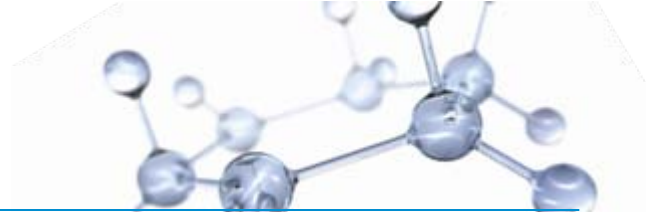


Rob Gardner  
March 9, 2010

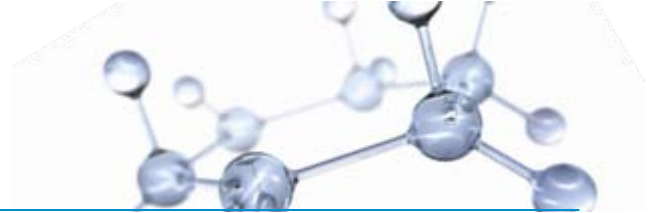
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This presentation includes forward-looking statements. Actual future conditions (including economic conditions, energy demand, and energy supply) could differ materially due to changes in technology, the development of new supply sources, political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



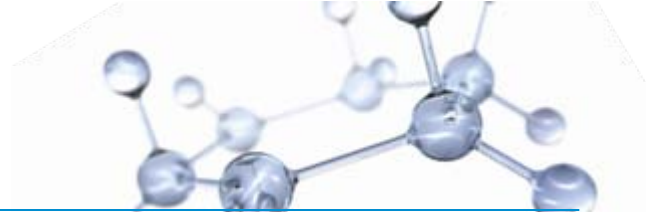
# Our Key Energy Challenges



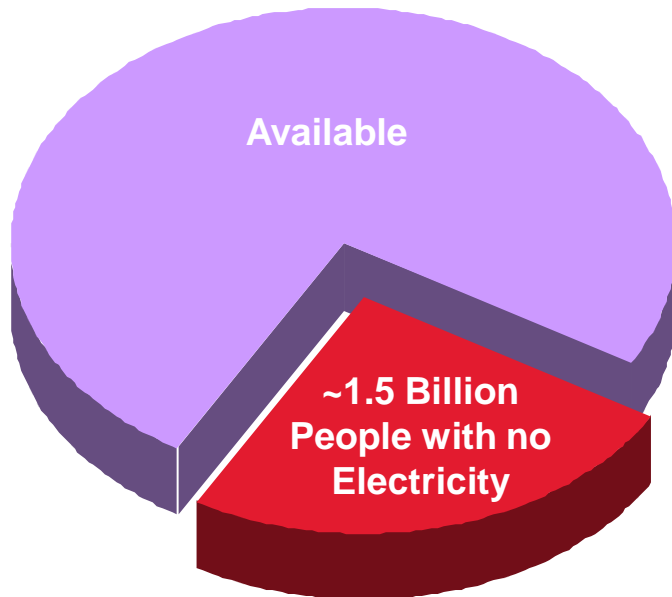
- Reducing poverty and improving living standards
- Supporting economic growth
- Minimizing impacts on the environment
- Maintaining energy security
- Development of reliable and affordable energy sources and efficiency gains – are essential



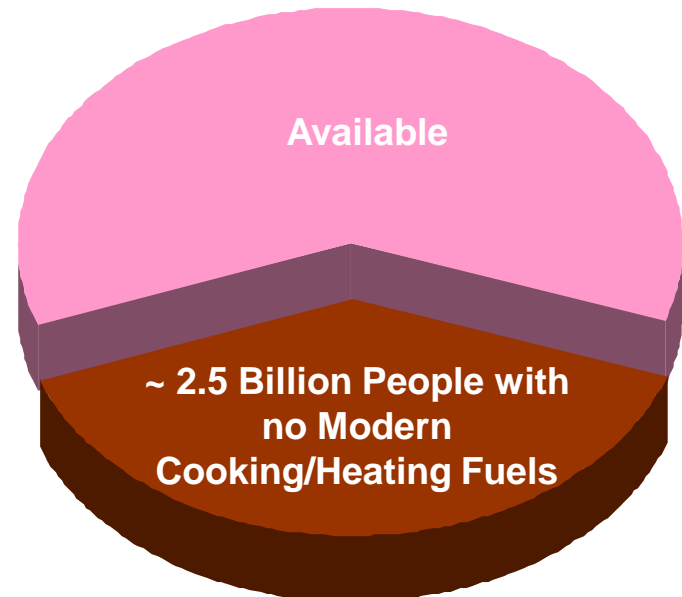
# Challenge: Meeting Basic Needs



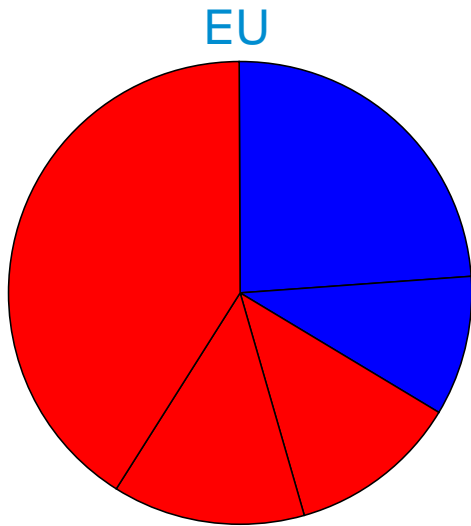
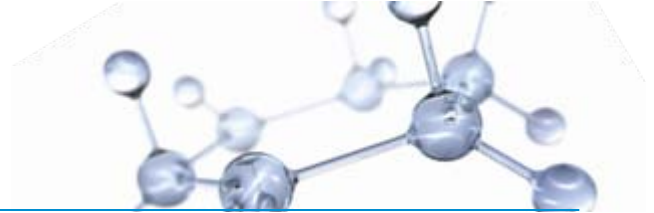
## Electricity



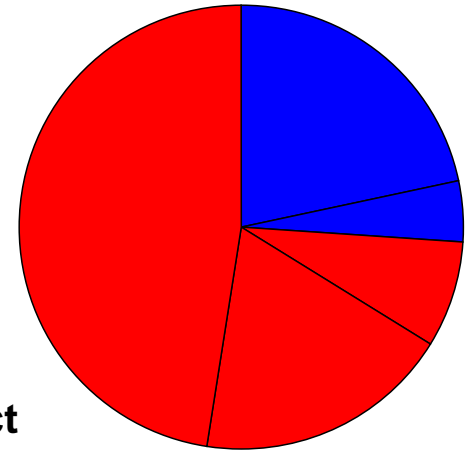
## Modern Cooking/Heating Fuels



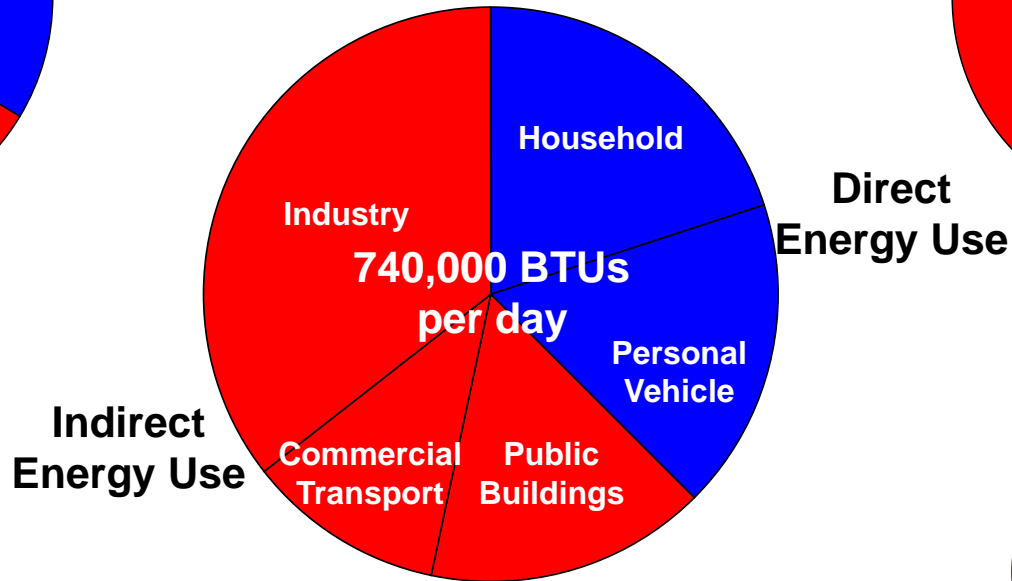
# Your Energy Use



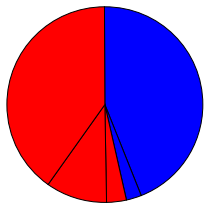
Middle East



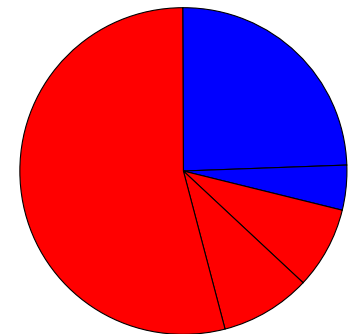
North America



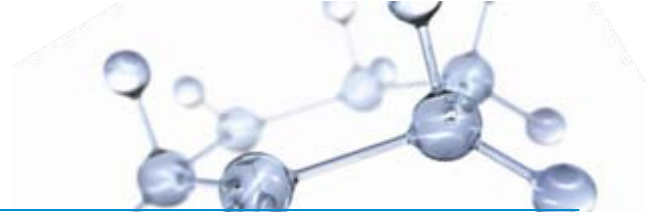
Africa



Asia Pacific

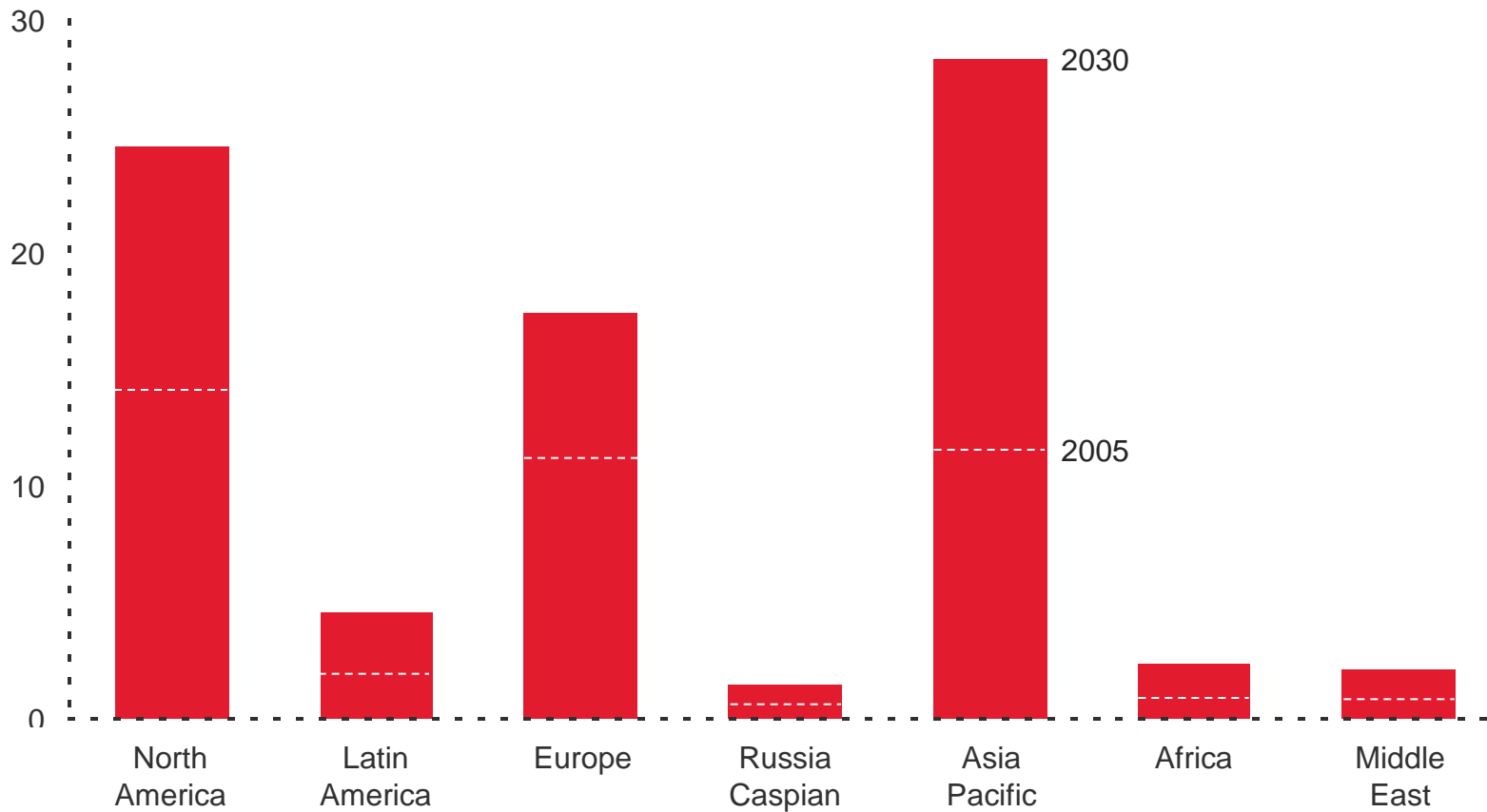


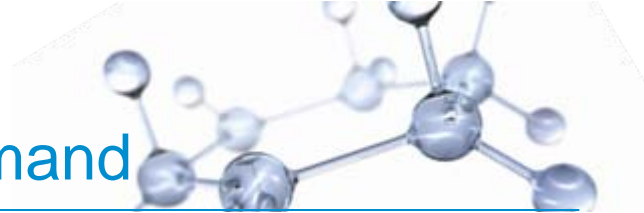
# GDP



## By Region

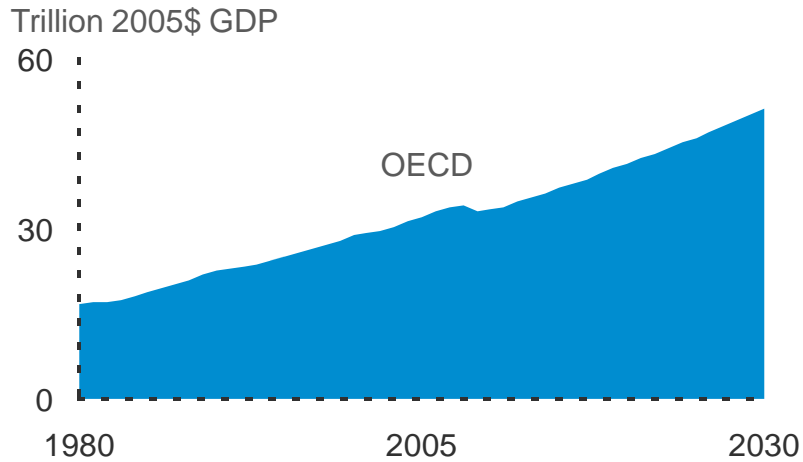
Trillion 2005\$ GDP



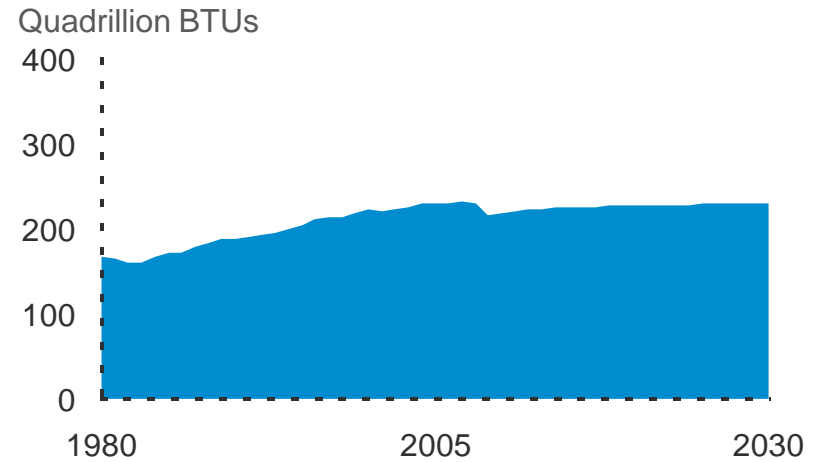


# Economic Growth Drives Energy Demand

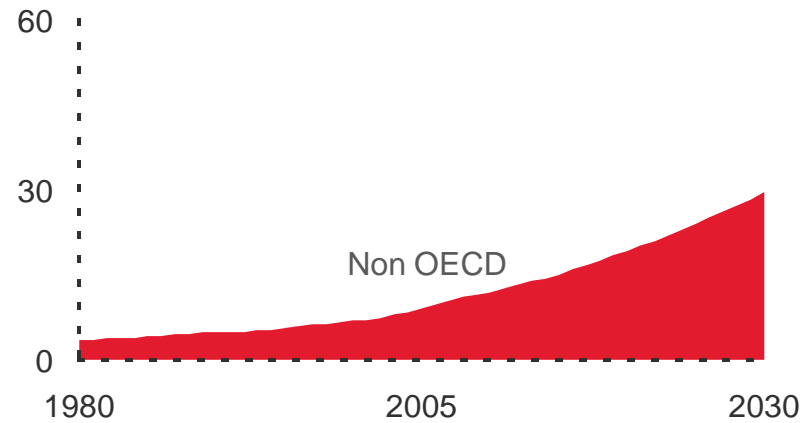
## GDP



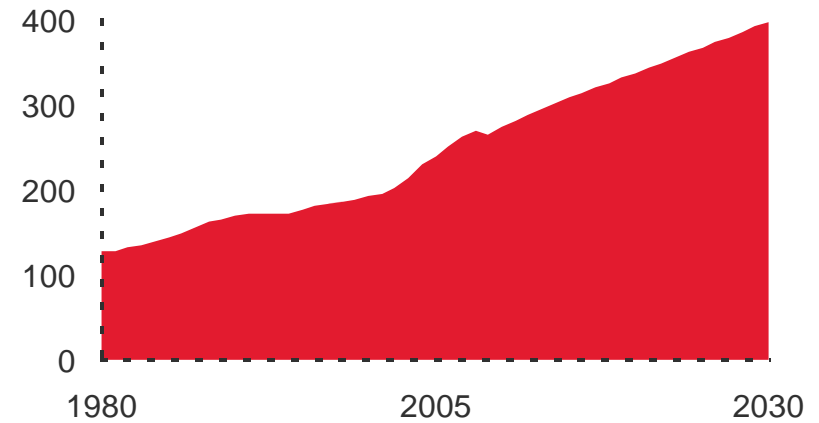
## Demand



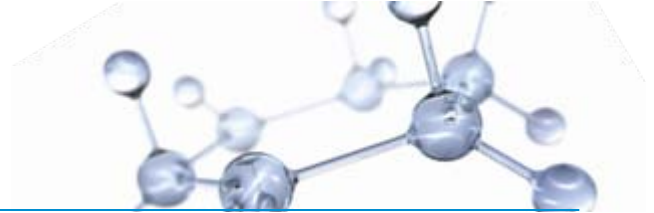
## Trillion 2005\$ GDP



## Quadrillion BTUs

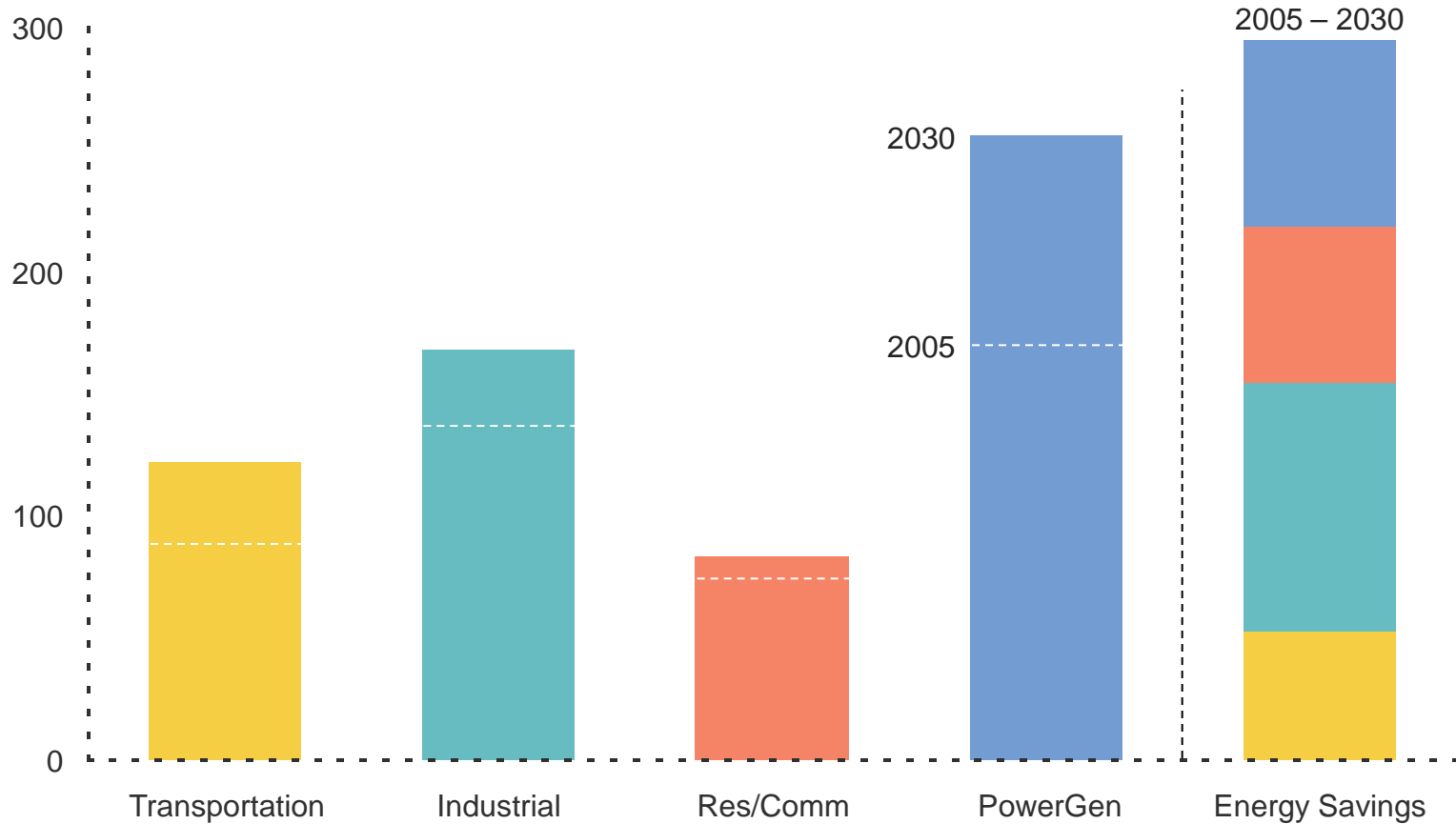


# Growing Global Demand

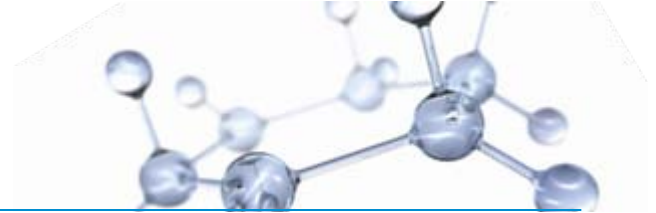


## By Sector

Quadrillion BTUs

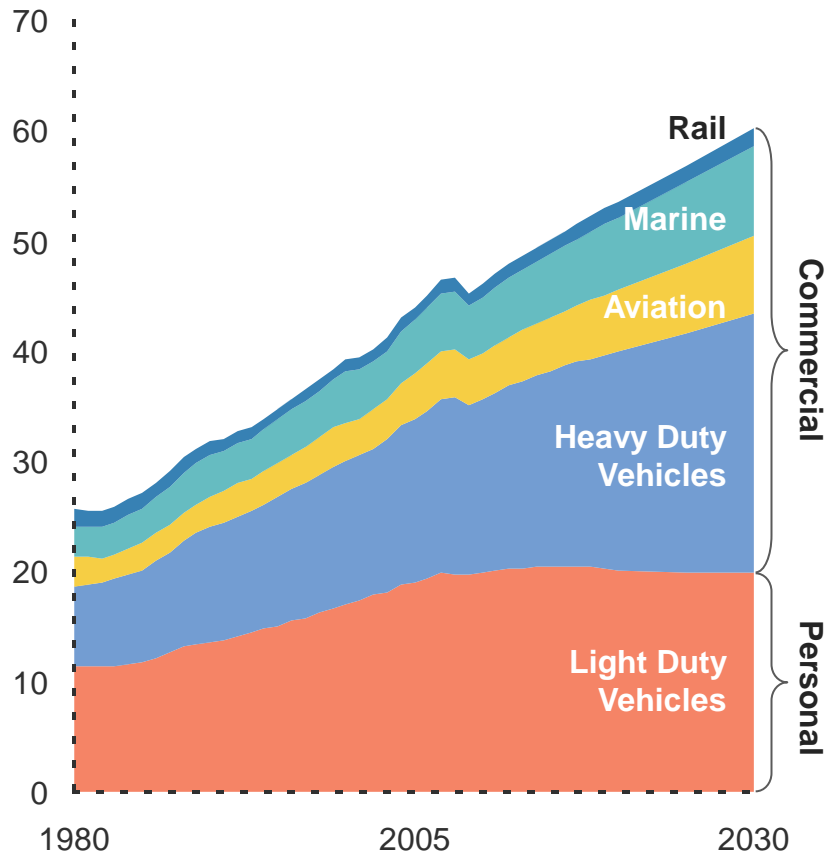


# Global Transportation Demand



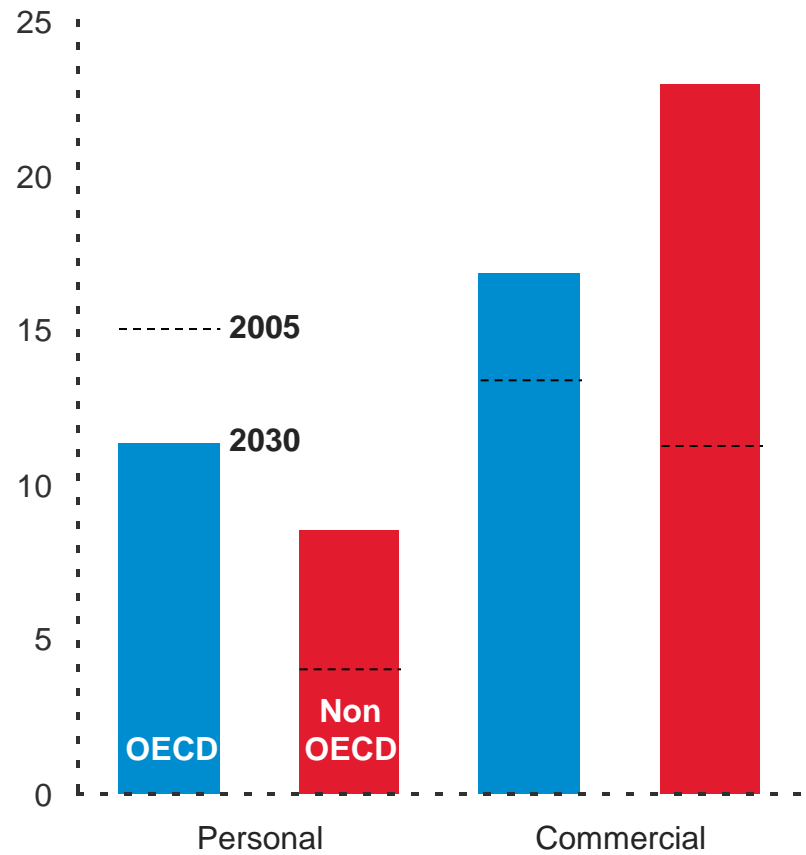
## By Sector

MBDOE

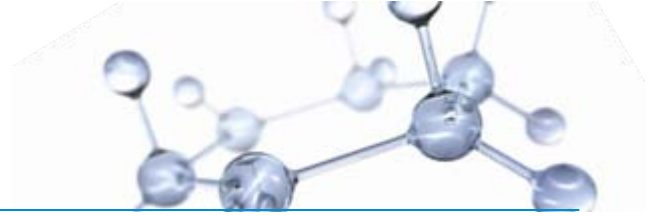


## Personal vs. Commercial

MBDOE

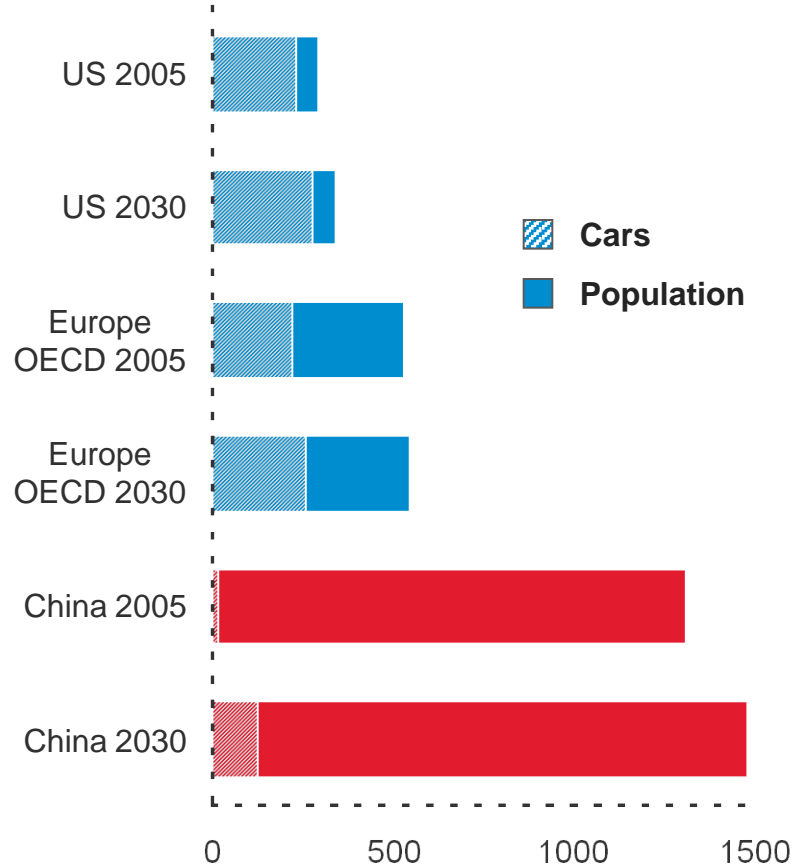


# Personal Vehicle Fleet is Growing



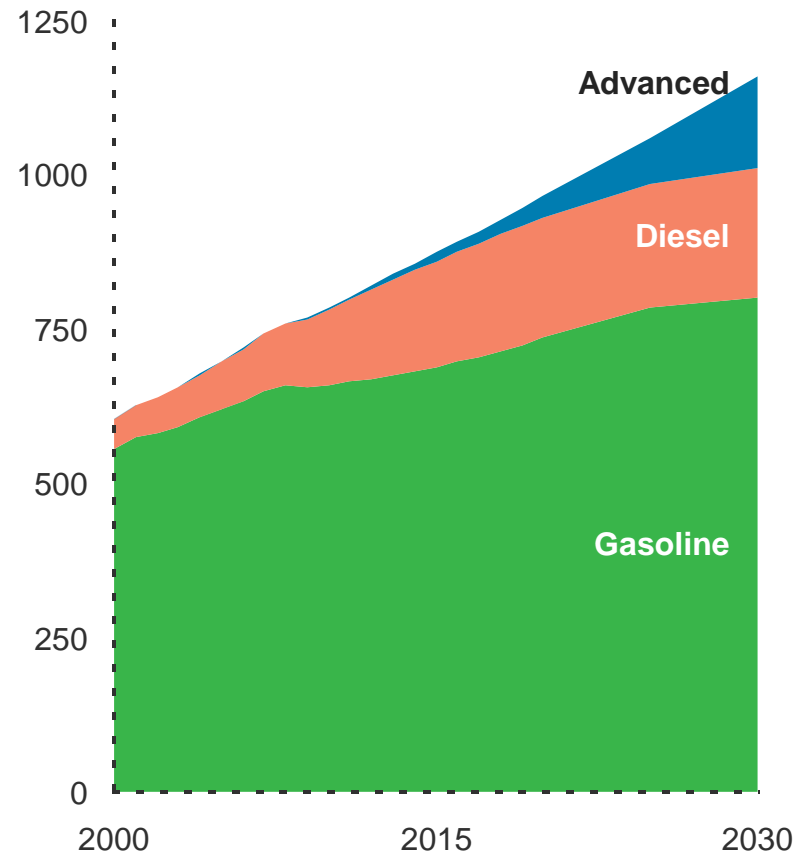
## Vehicle Penetration

Cars and Population (millions)

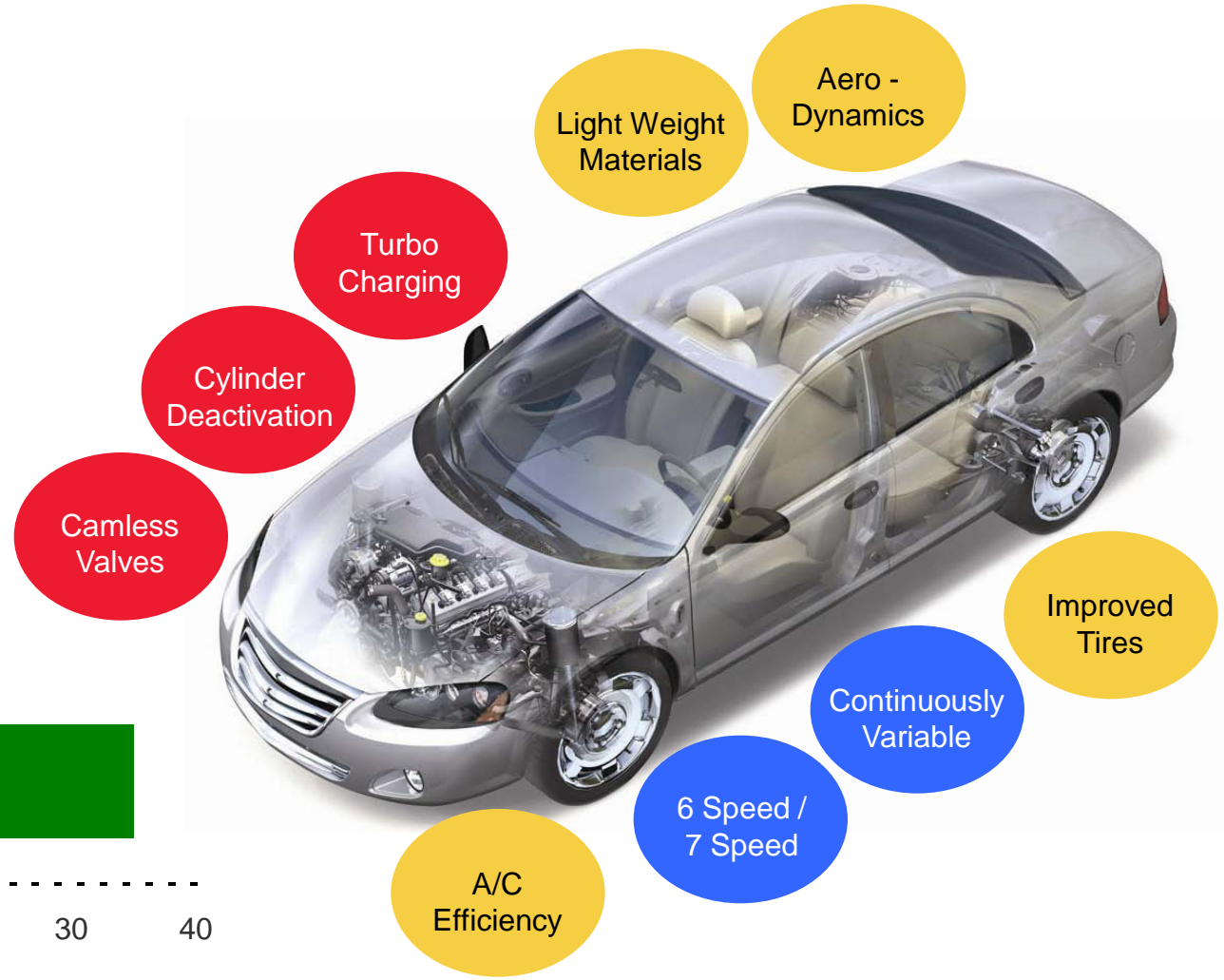
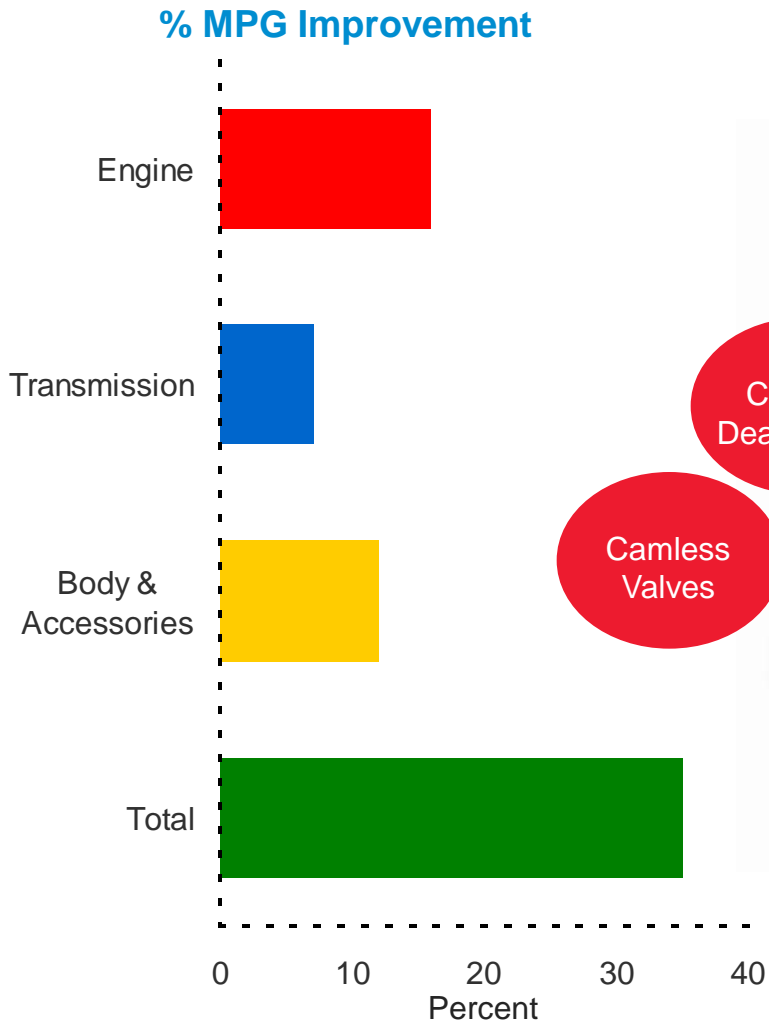


## Fleet by Car Type

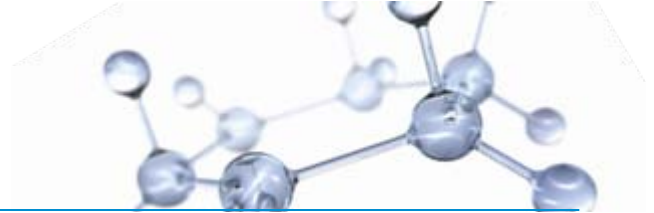
Million Cars



# Improving Today's Vehicle

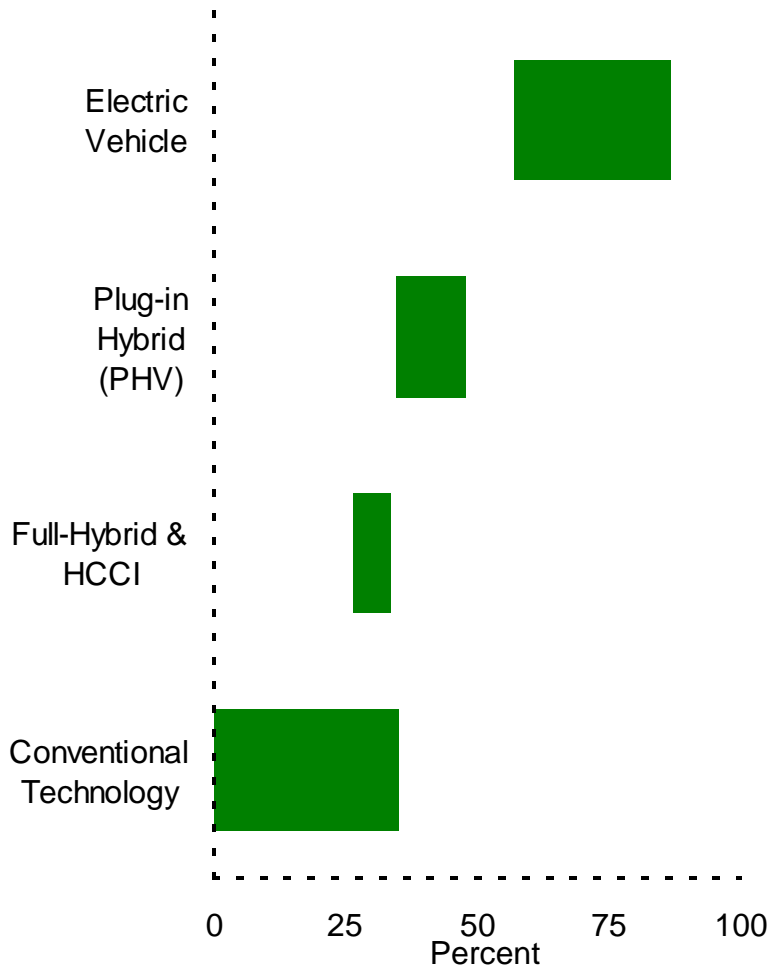


# Light Duty Vehicle Technology

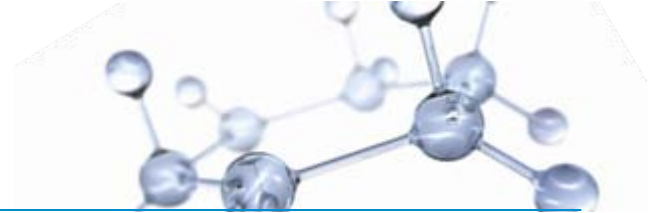


## % MPG Improvement

Well to Wheels Gasoline Equiv.



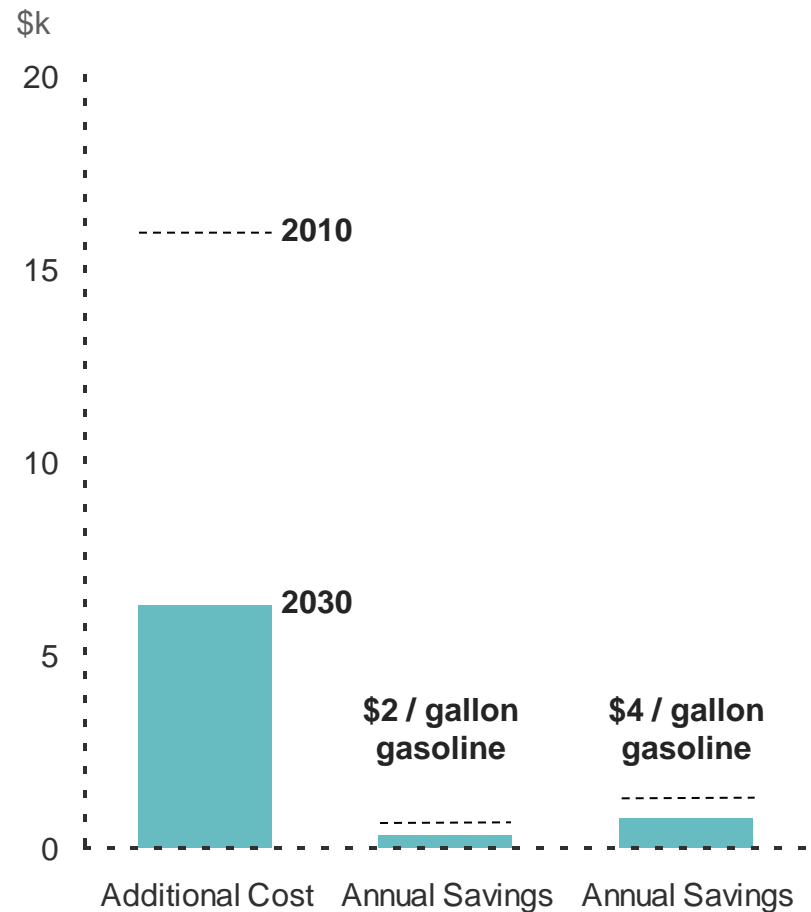
# Light Duty Vehicle Technology



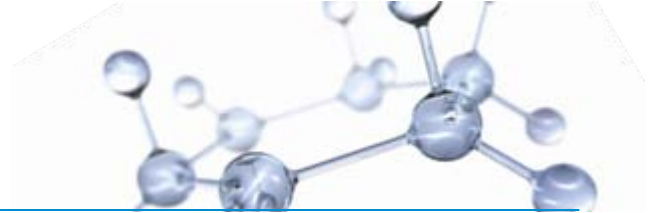
## Plug-in Hybrid Assumptions

	<u>2010</u>	<u>2030</u>
Battery cost, \$/kWh	800	300
Battery replacements over the vehicle life, #	0	0
Electricity cost, ¢/kWh	5	5

## Plug-in Hybrid vs. Conventional Vehicles

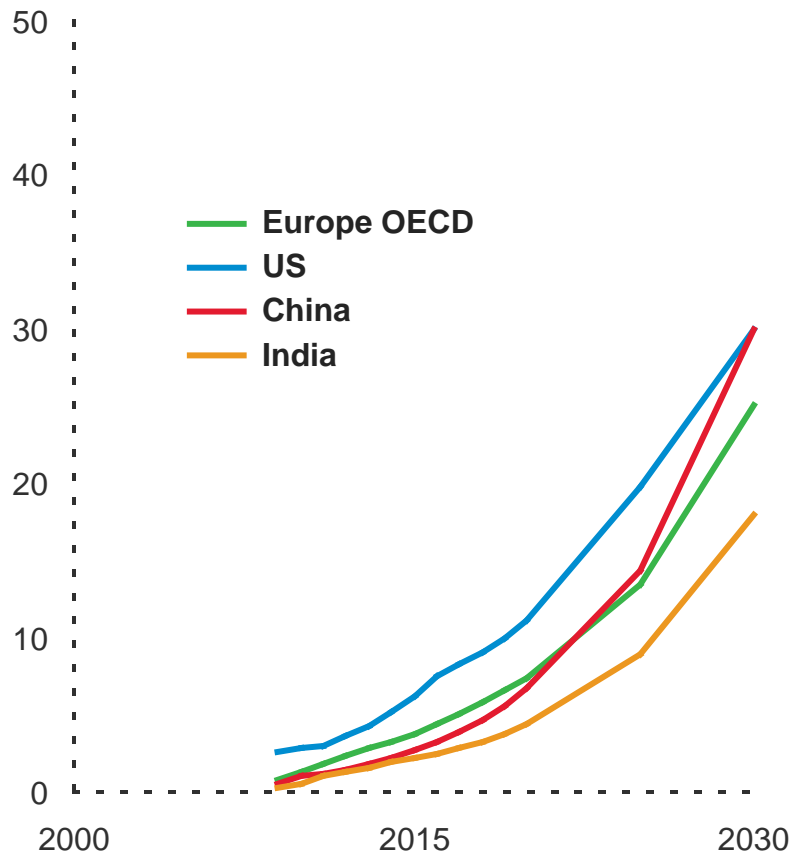


# Light Duty Vehicles



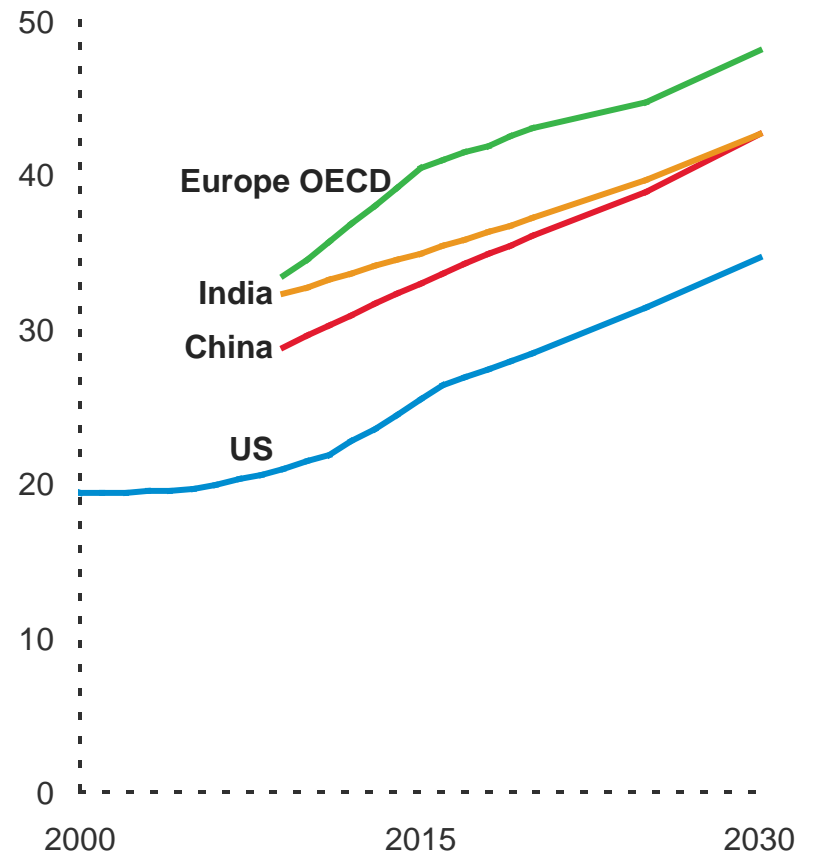
## Advanced Cars\*

Percent of New Sales



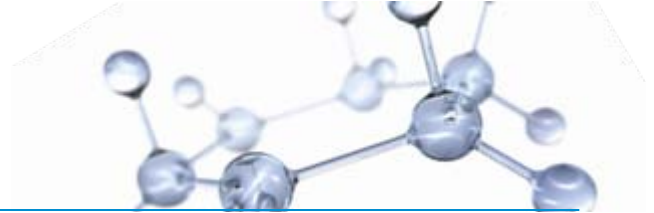
## Average New Car

MPG

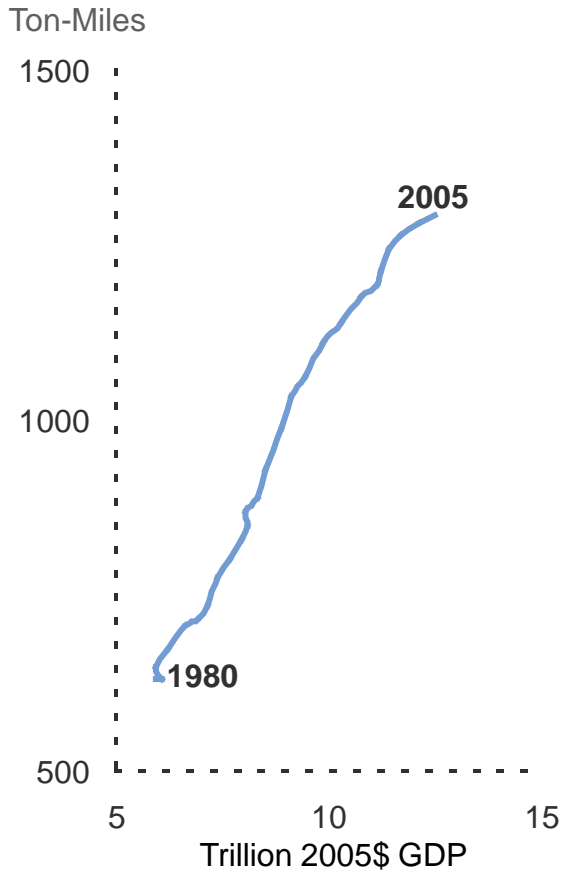


\*Full Hybrids, HCCI, PHV, EV

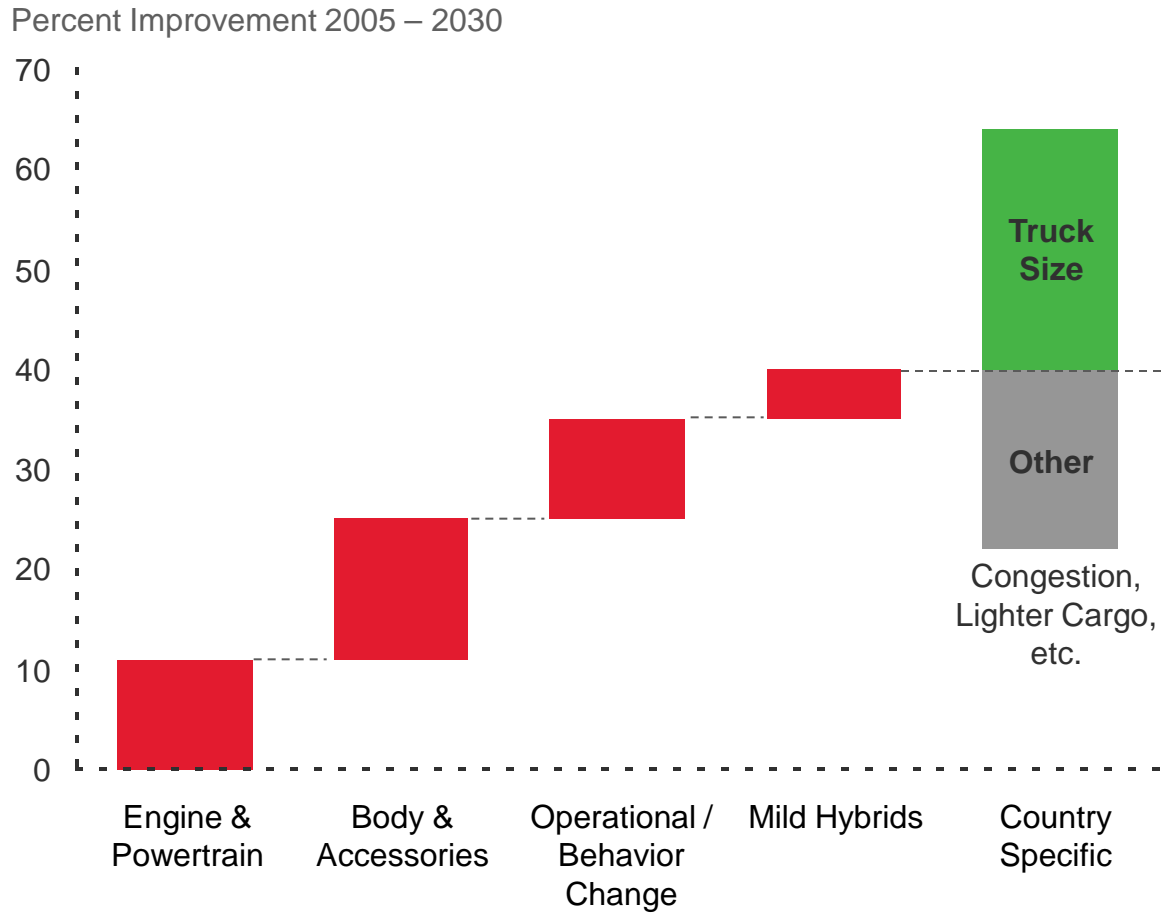
# Heavy Duty Vehicles



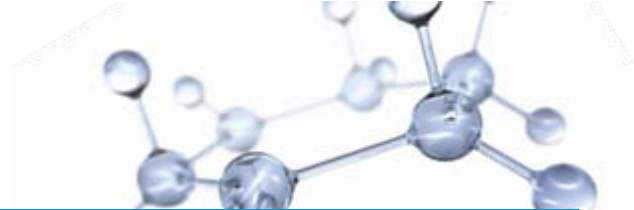
## Road Freight – US



## New Truck Efficiency

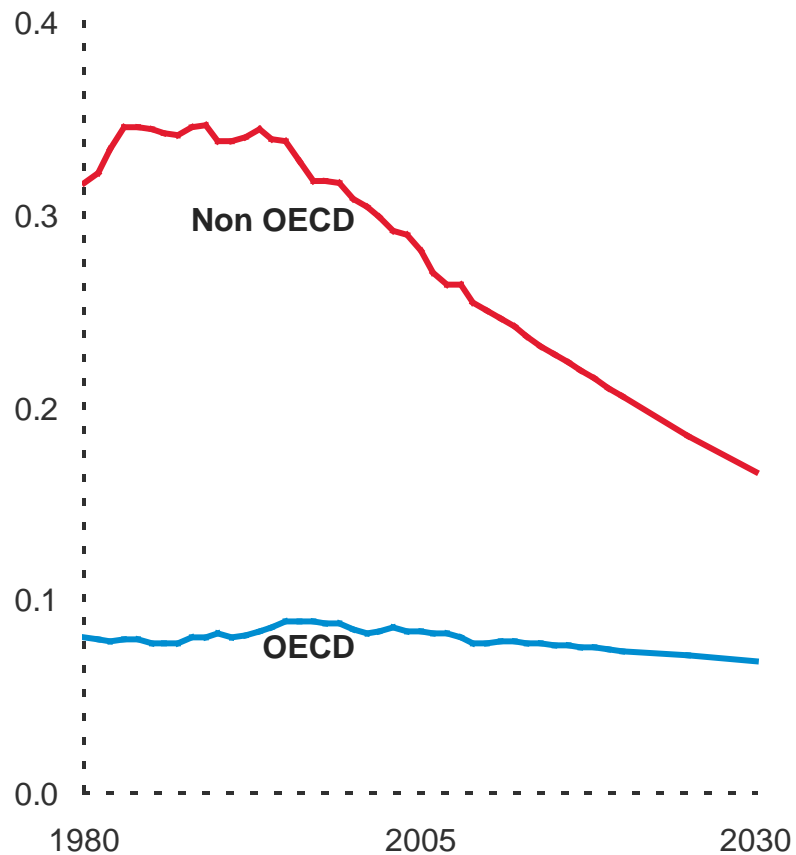


# Heavy Duty Vehicles



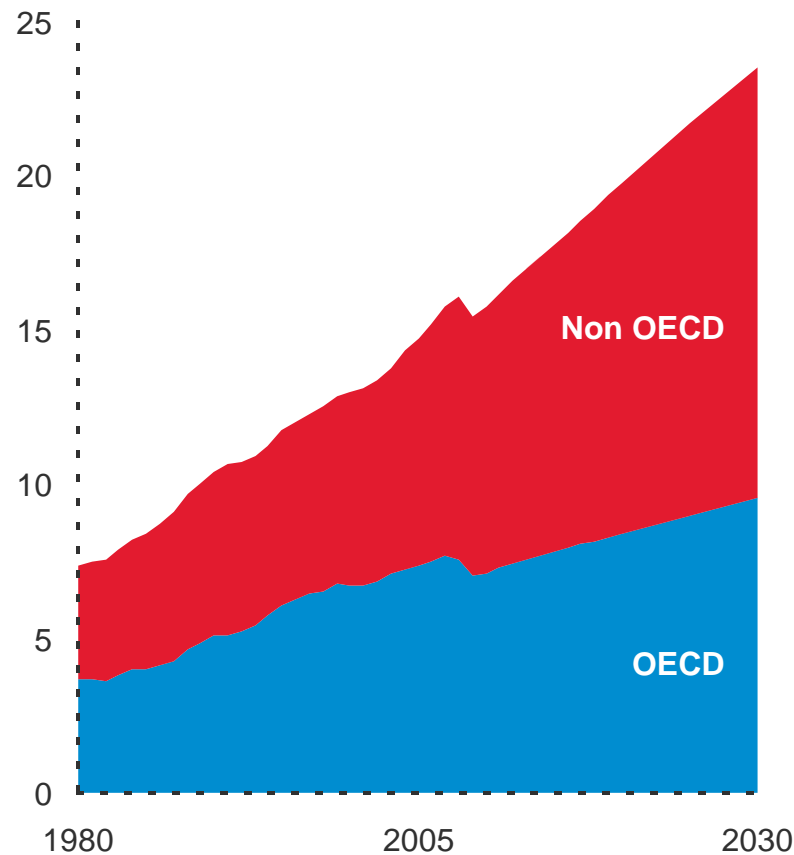
## Intensity

BOE / 2005\$ k GDP

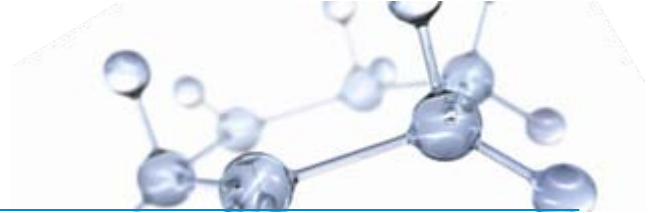


## By Region

MBDOE

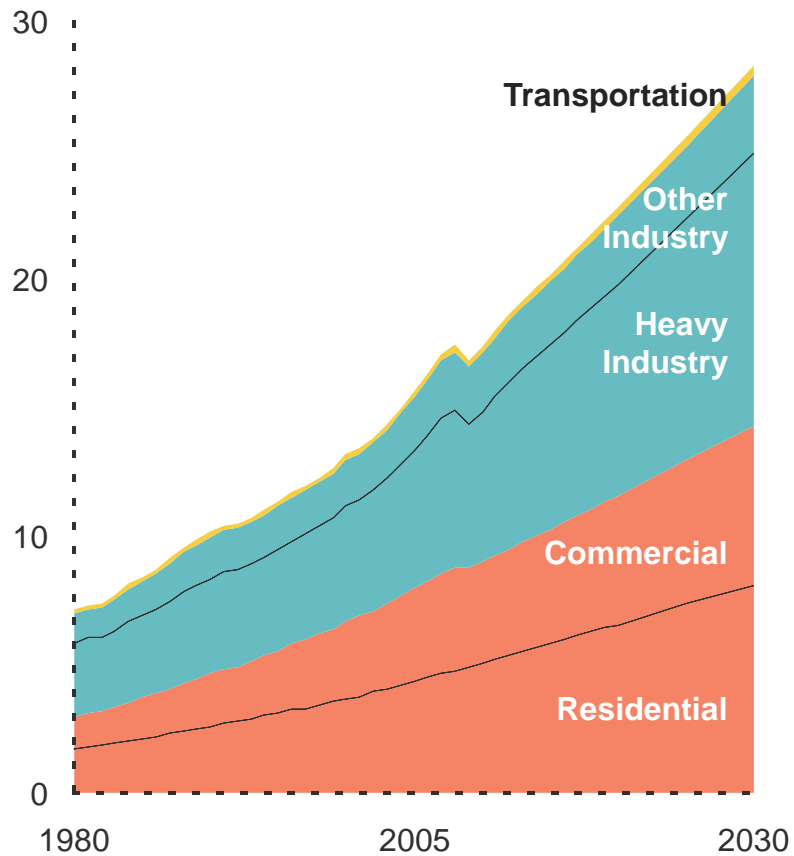


# Electricity Use is Growing Fast



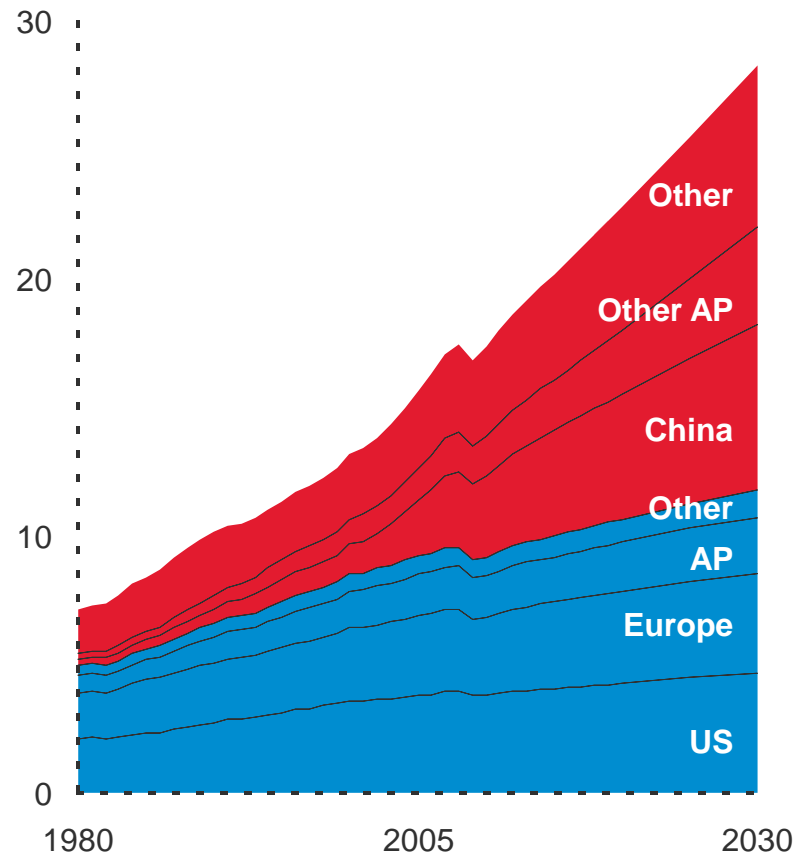
## By Sector

k TWhr

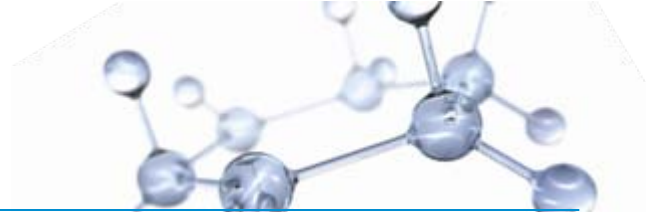


## By Region

k TWhr

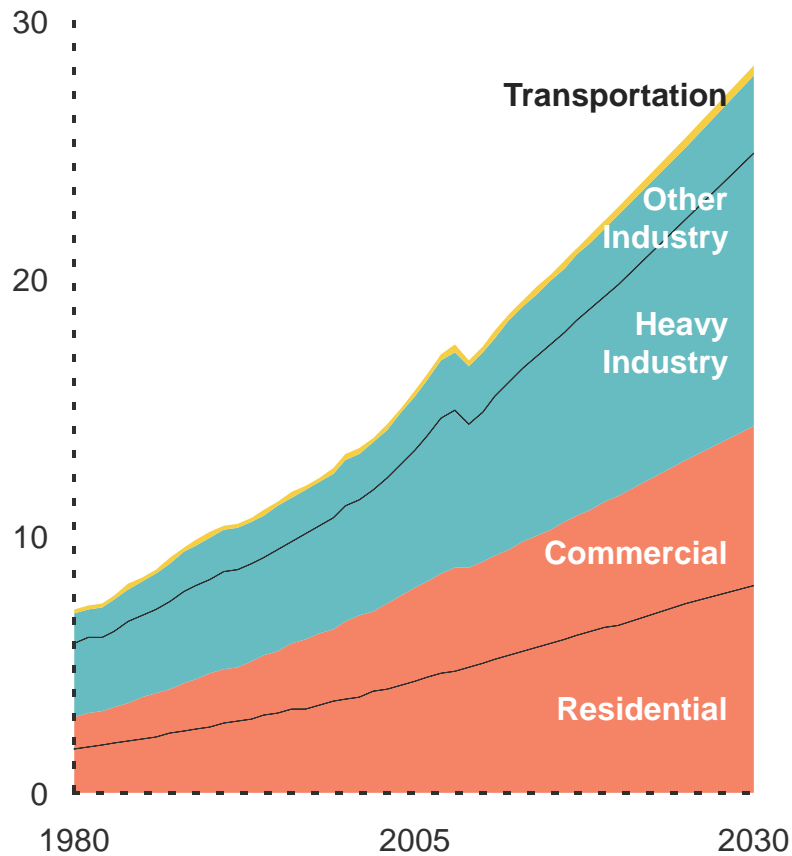


# Electricity Use is Growing Fast



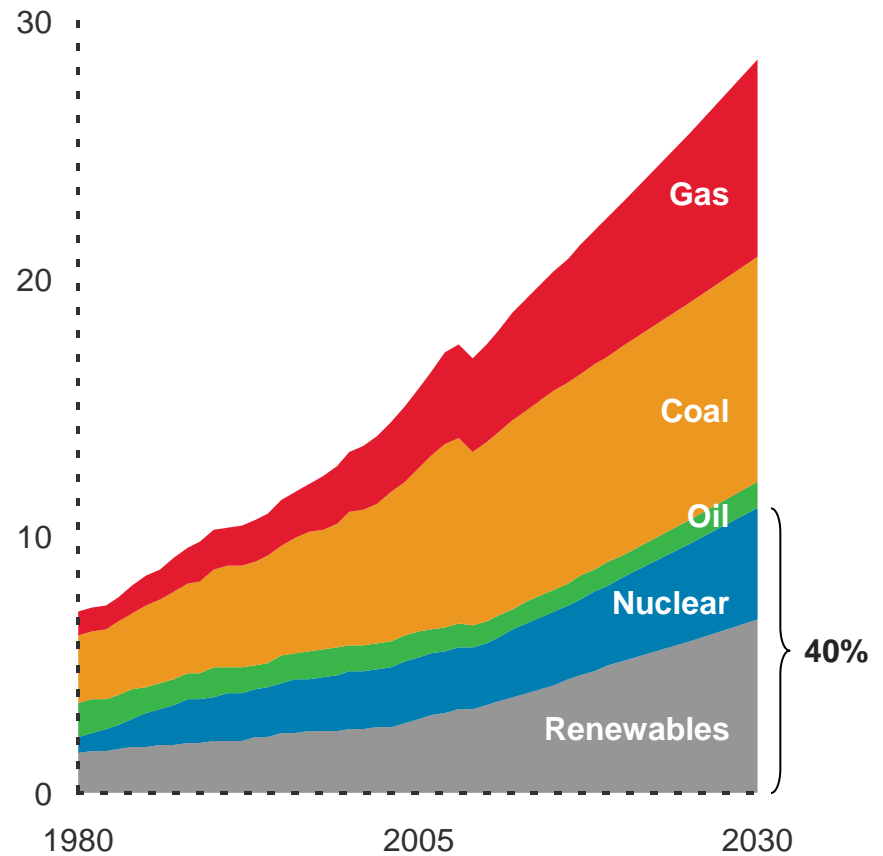
## By Sector

k TWhr

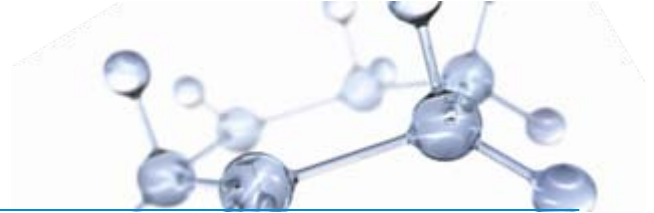


## By Generation

k TWhr

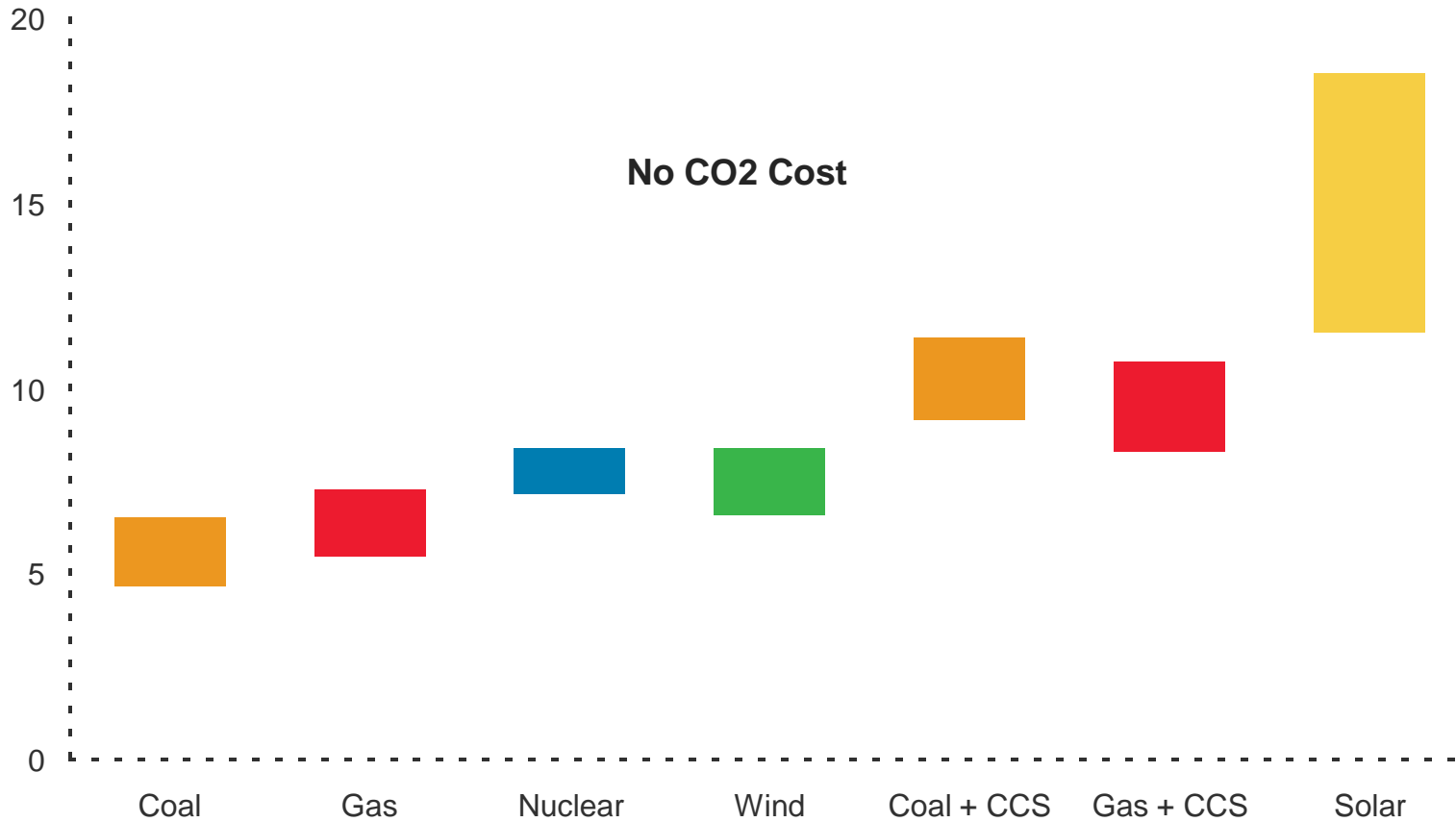


# Electricity Generation Cost

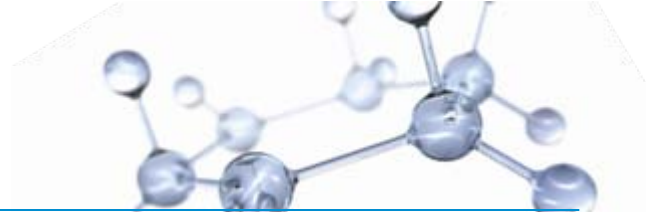


## US Baseload, Startup 2025

2009 Cents/kWhr

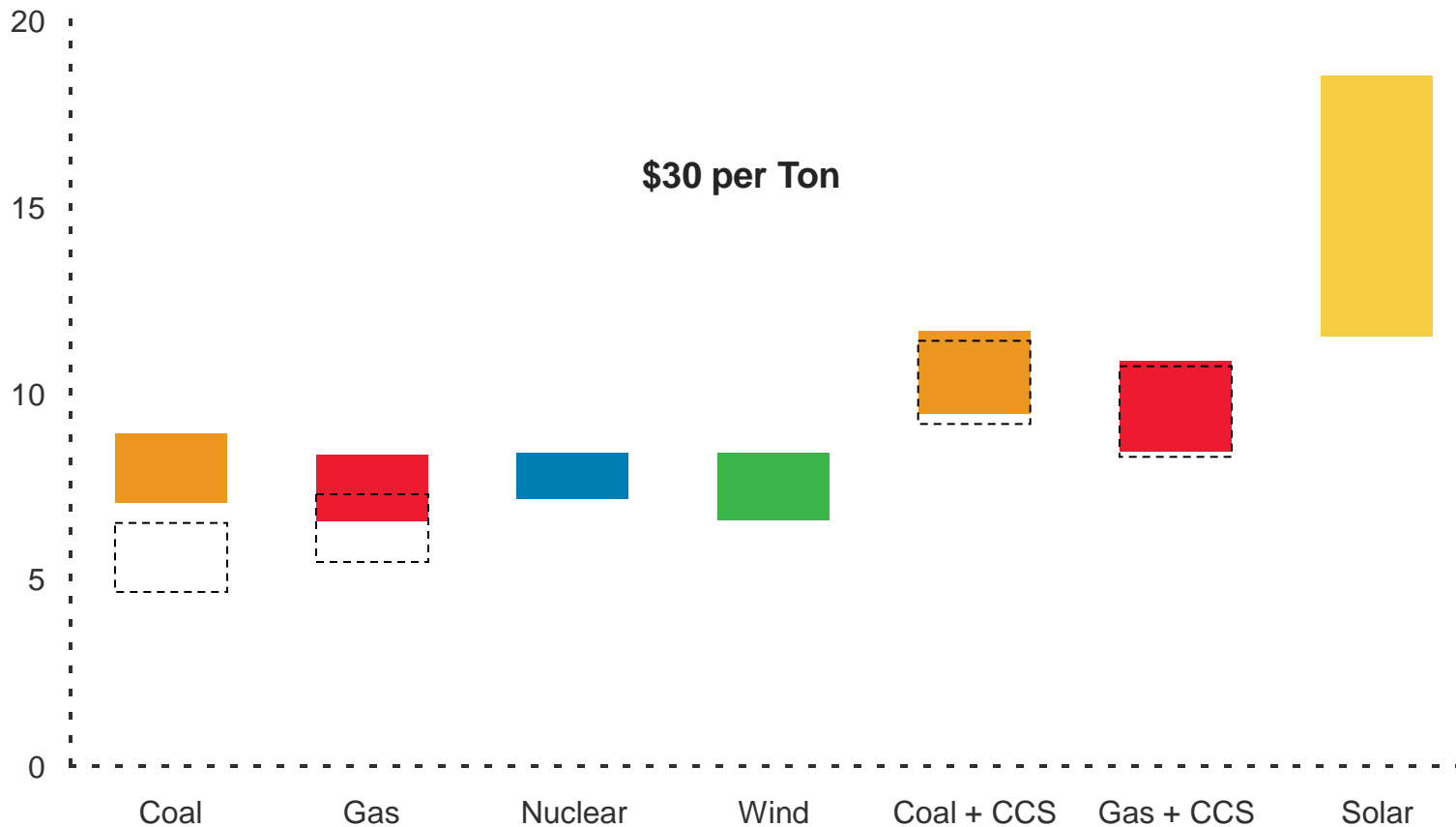


# Electricity Generation Cost

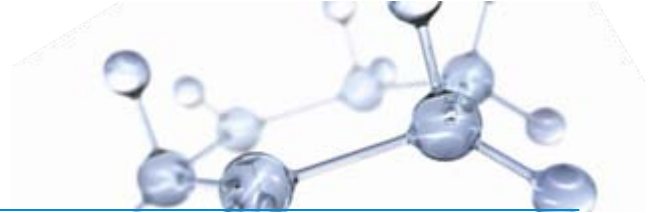


## US Baseload, Startup 2025

2009 Cents/kWhr

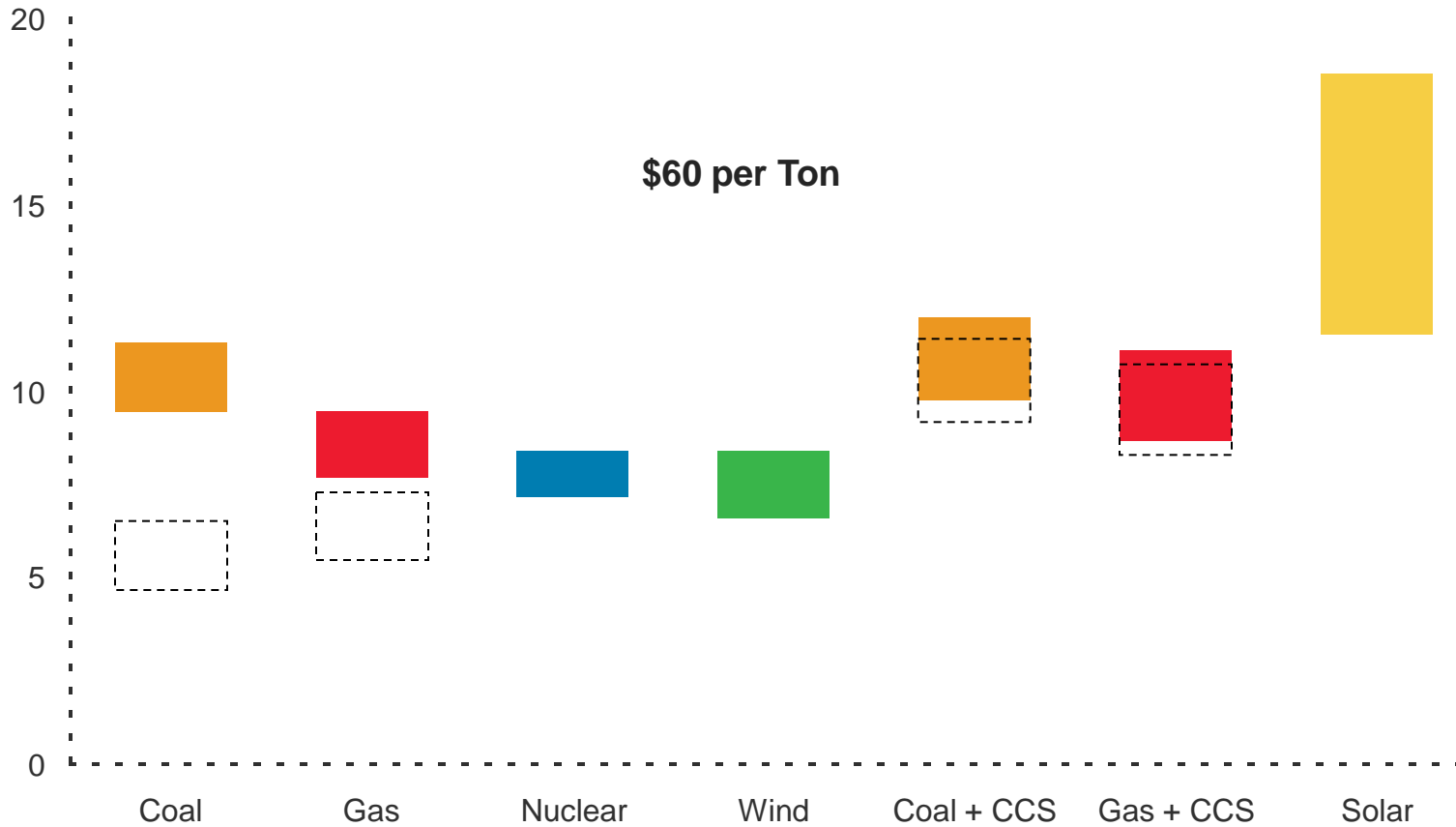


# Electricity Generation Cost

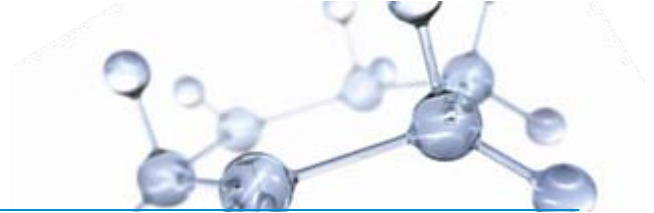


## US Baseload, Startup 2025

2009 Cents/kWhr

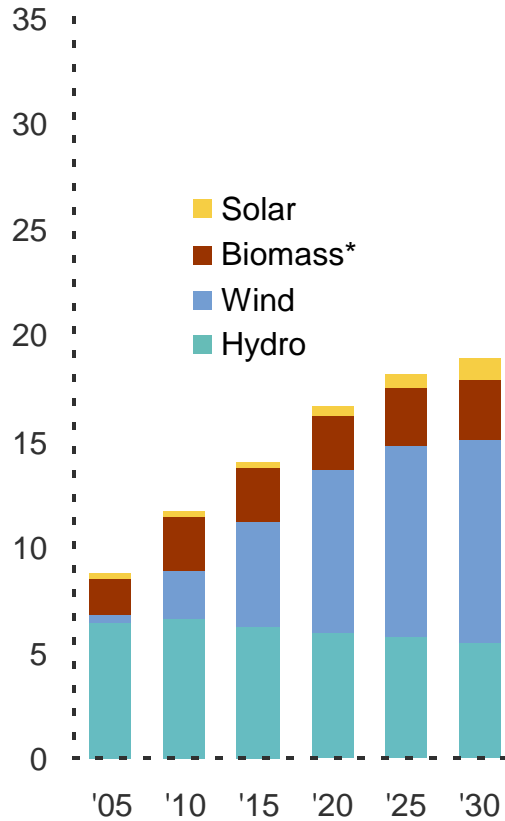


# Renewables by Region



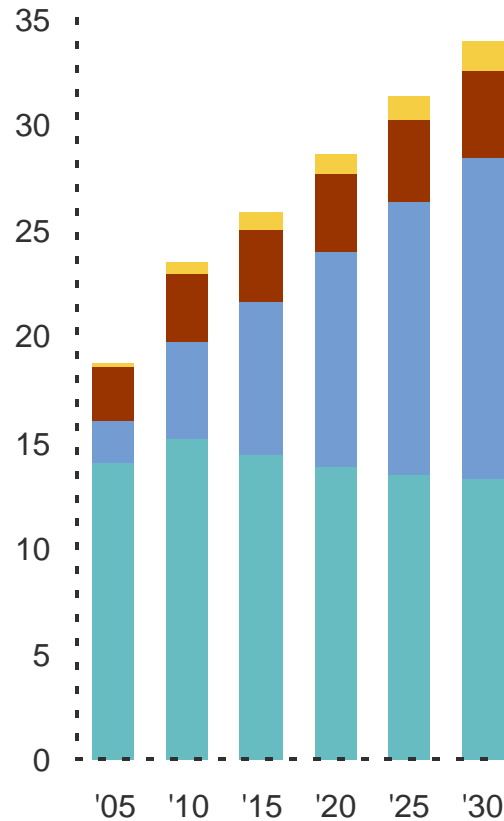
## United States

Percent of TWhr



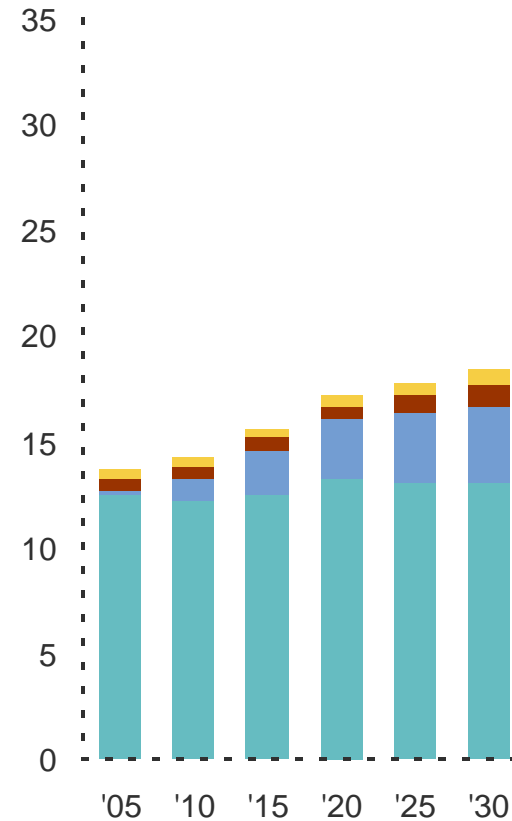
## Europe OECD

Percent of TWhr



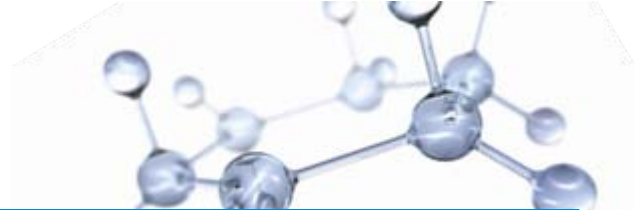
## Asia Pacific

Percent of TWhr



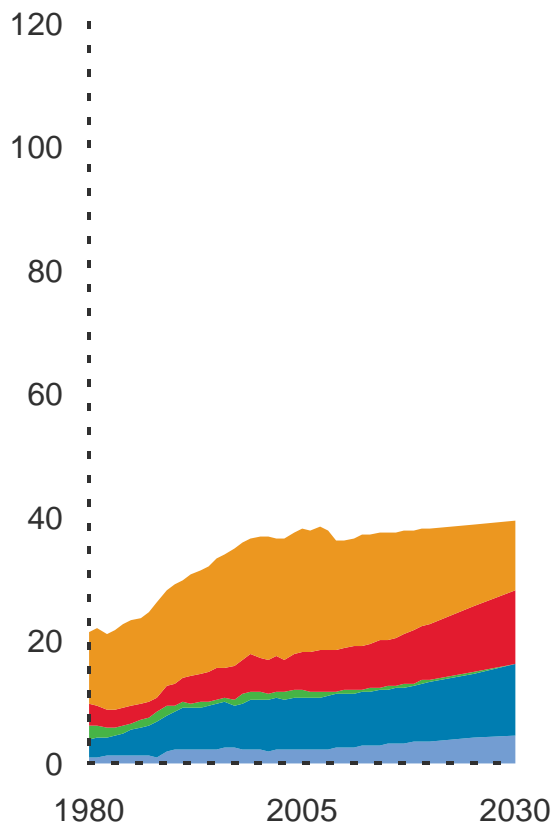
\*Biomass includes Municipal Solid Waste

# Power Generation Fuel Demand



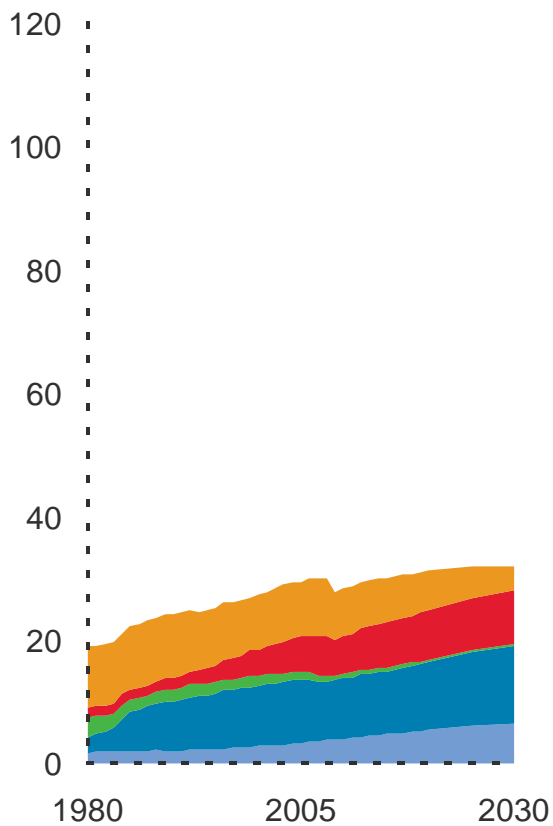
## United States

Quadrillion BTUs



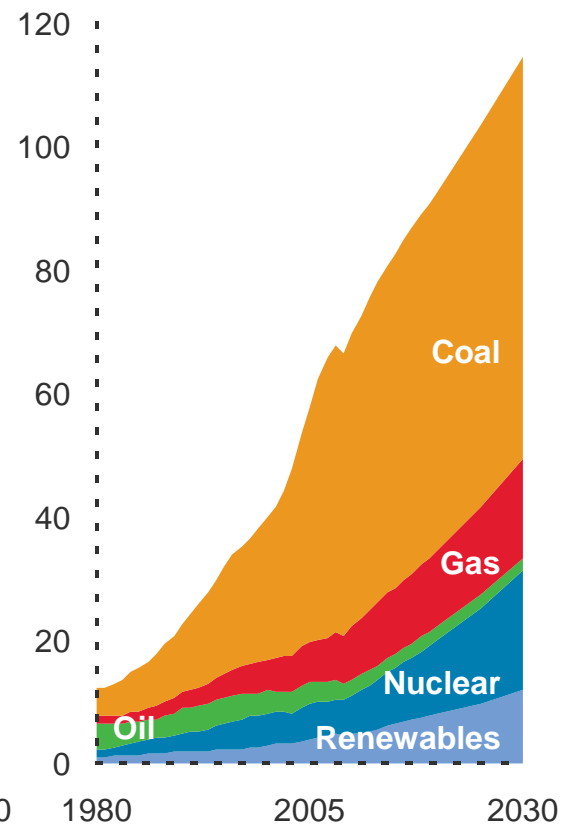
## Europe OECD

Quadrillion BTUs

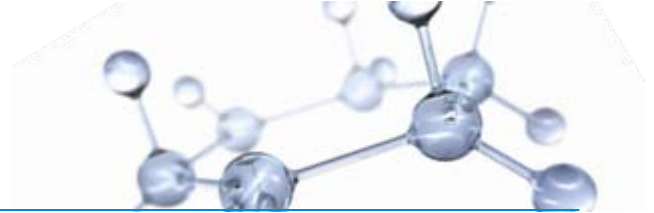


## Asia Pacific

Quadrillion BTUs

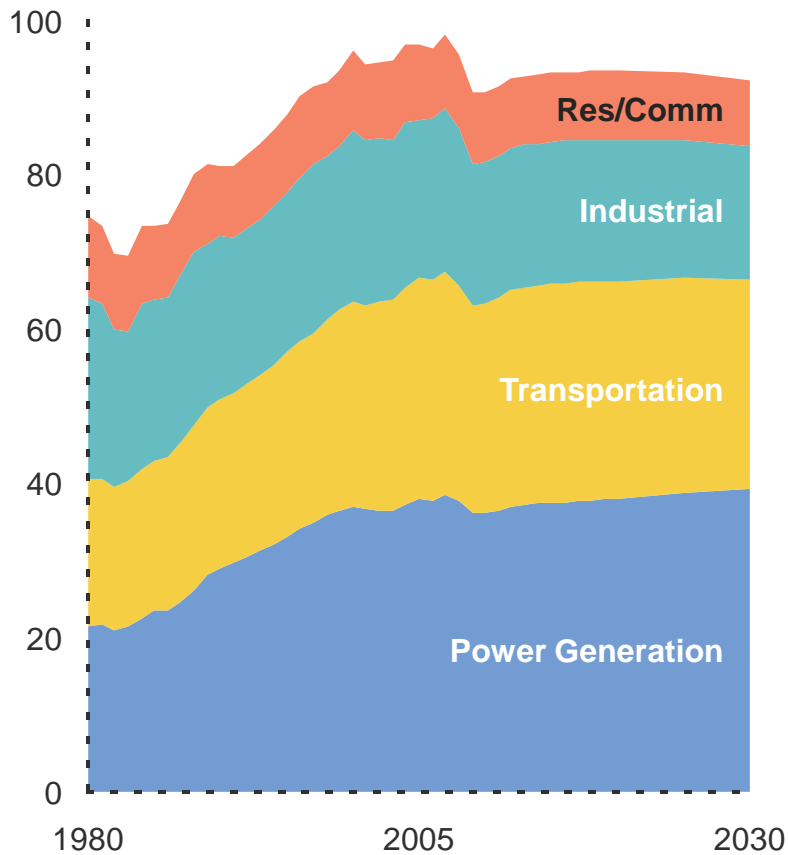


# US Energy Demand and Supply



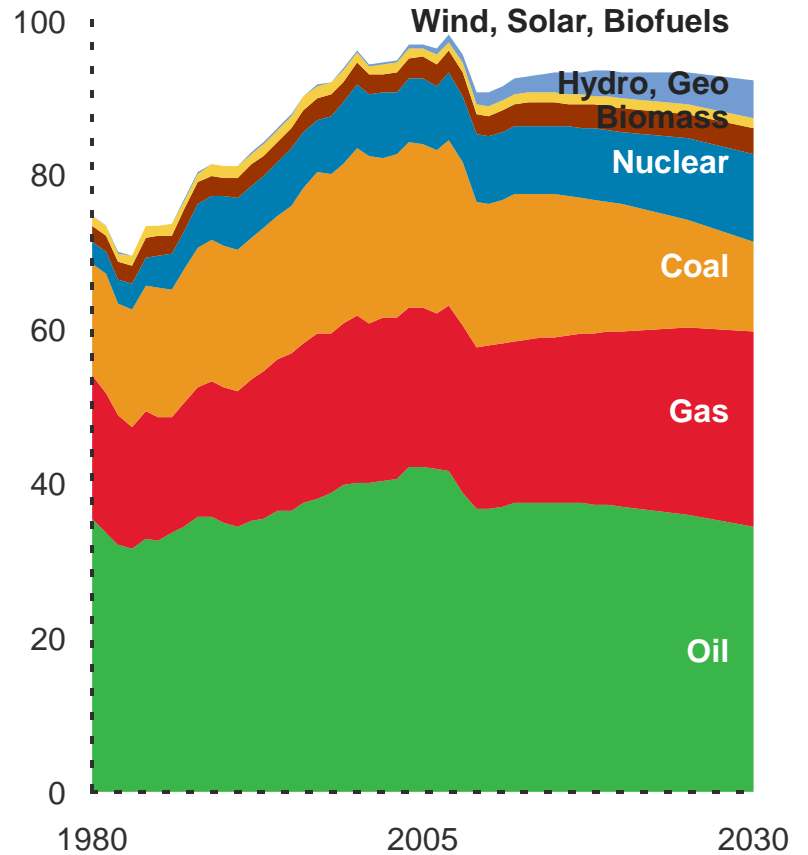
## By Sector

Quadrillion BTUs

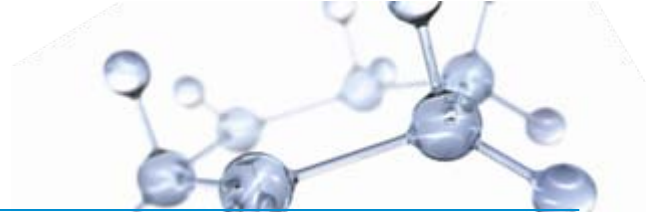


## By Fuel

Quadrillion BTUs

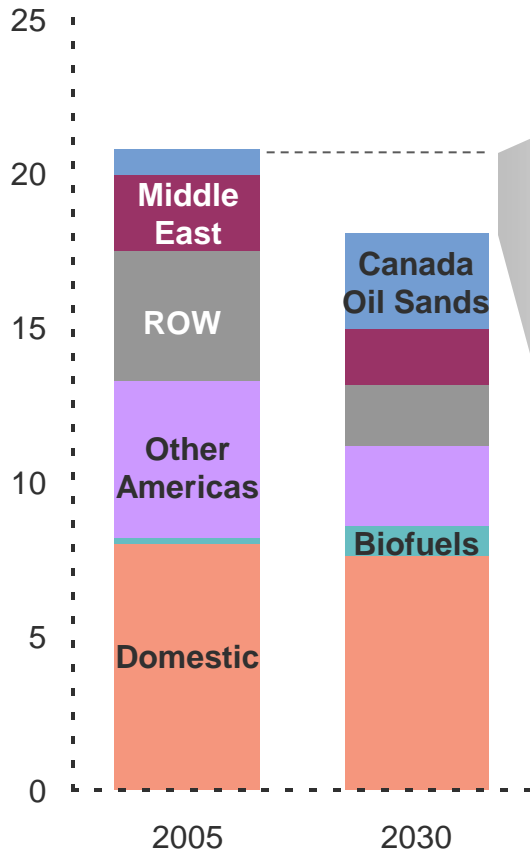


# US Liquids Supply and Demand



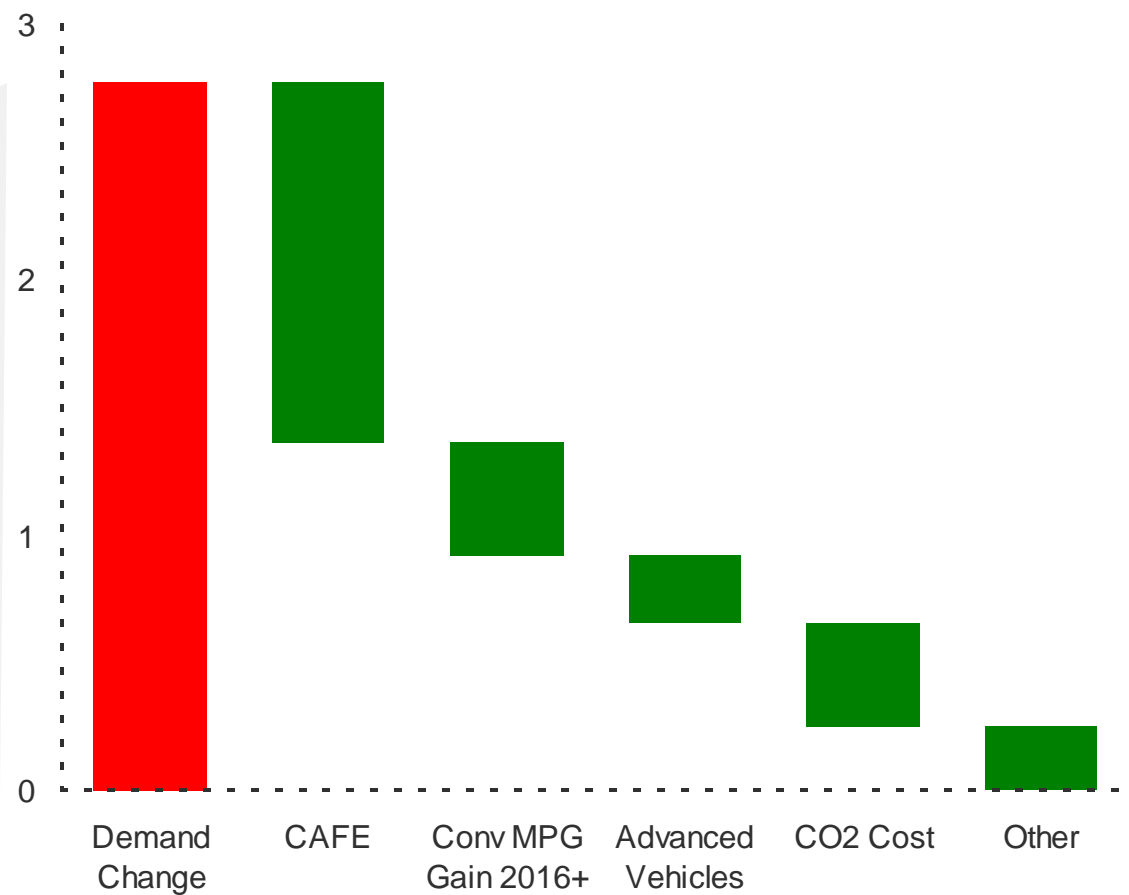
## US Liquids Supply

MBDOE

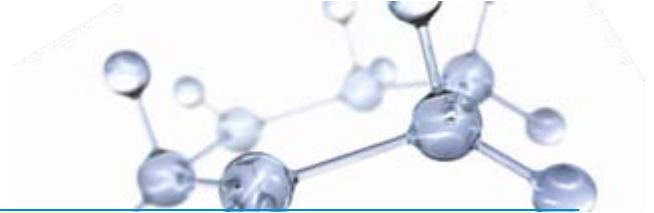


## Demand Reduction

MBDOE

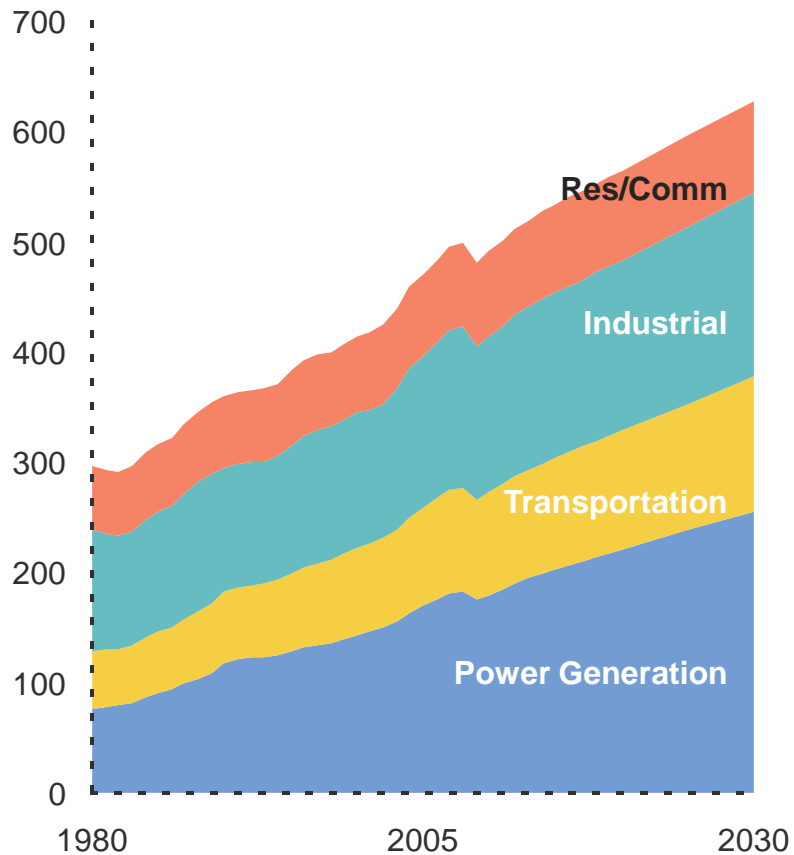


# Global Energy Demand and Supply



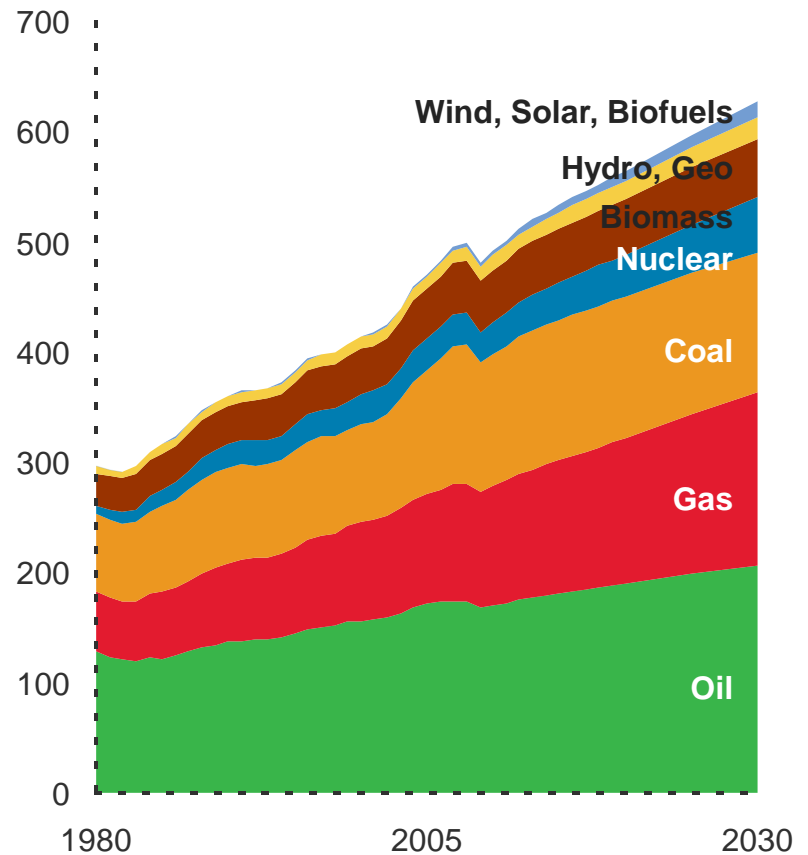
## By Sector

Quadrillion BTUs

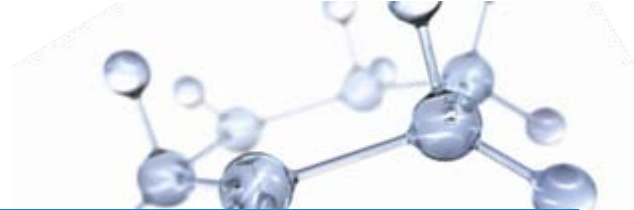


## By Fuel

Quadrillion BTUs

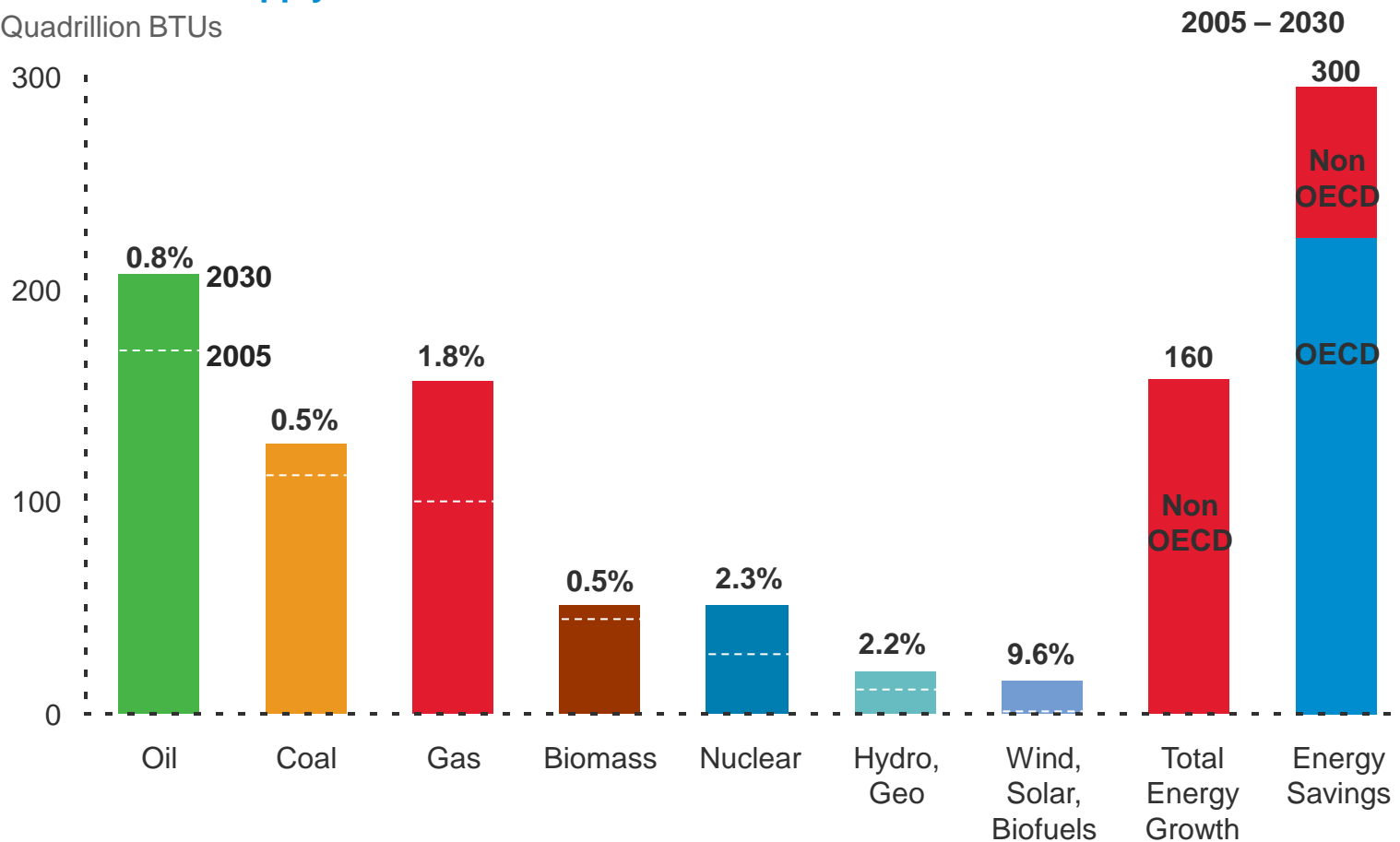


# Global Energy Demand and Supply

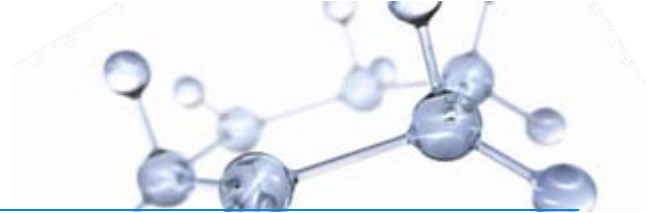


## Demand and Supply

Quadrillion BTUs

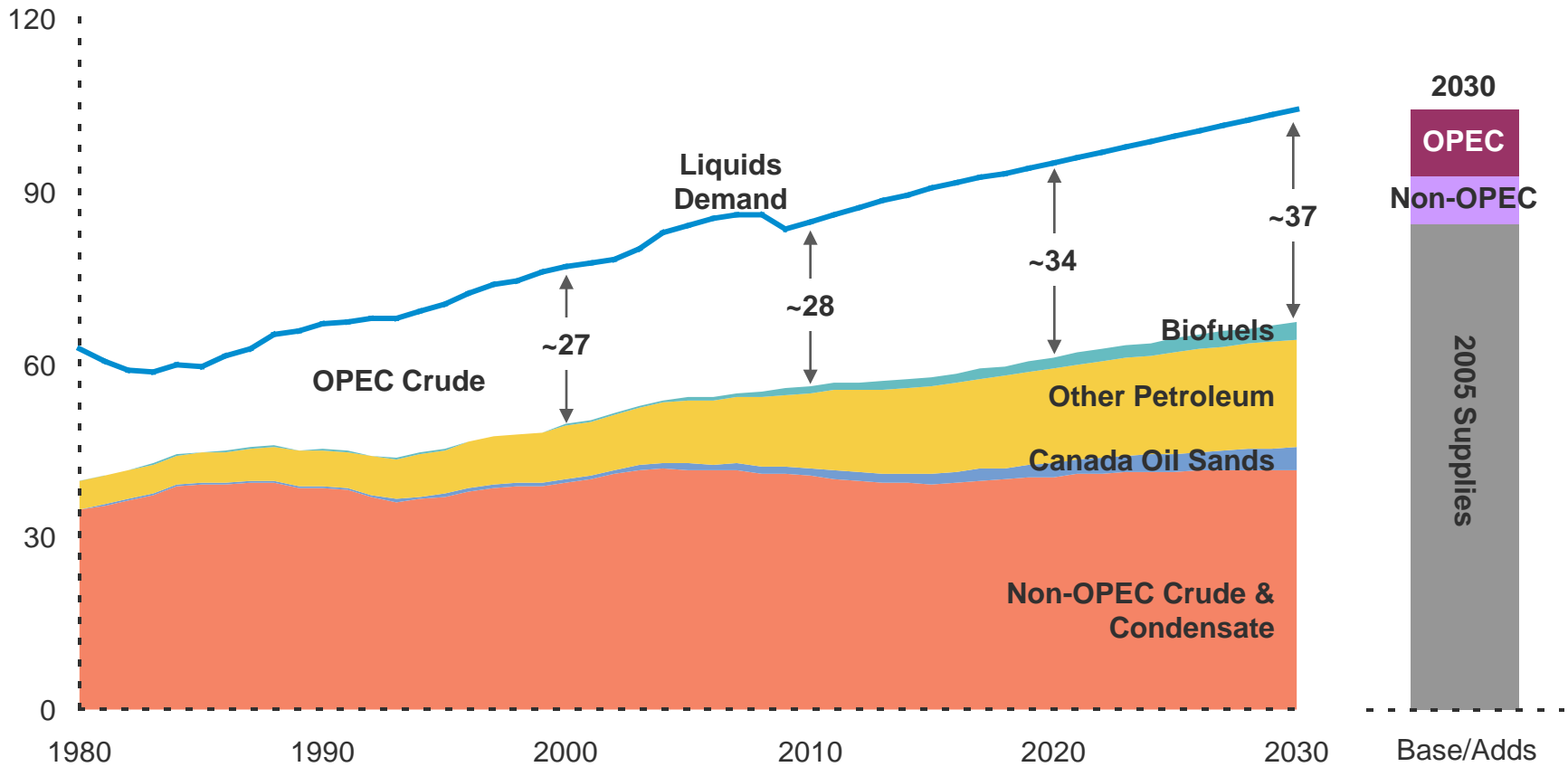


# Global Liquids Supply Grows

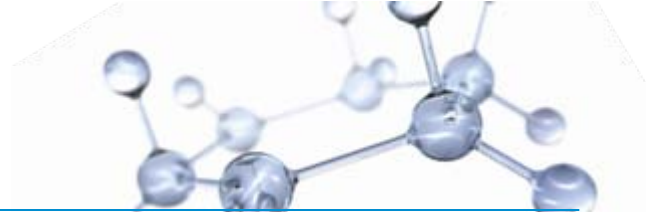


## Global Liquids Supply and Demand

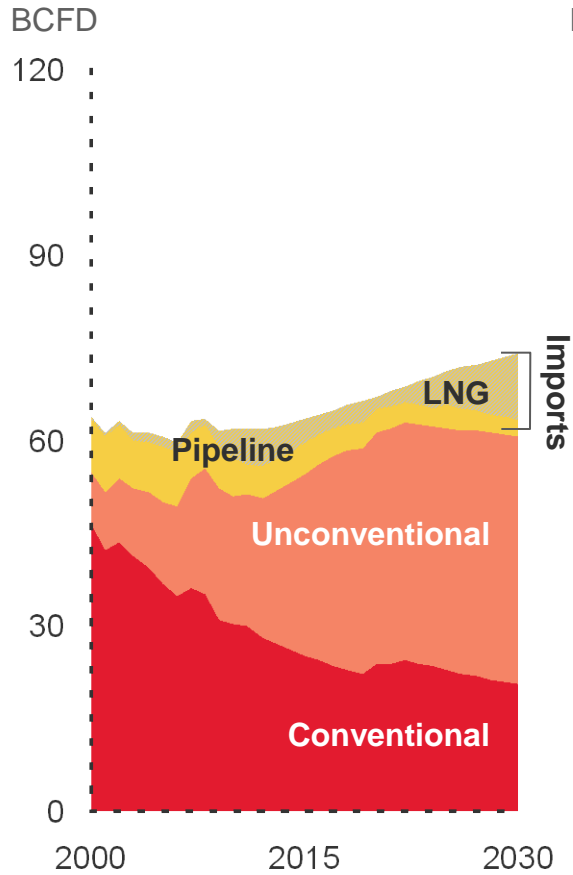
MBDOE



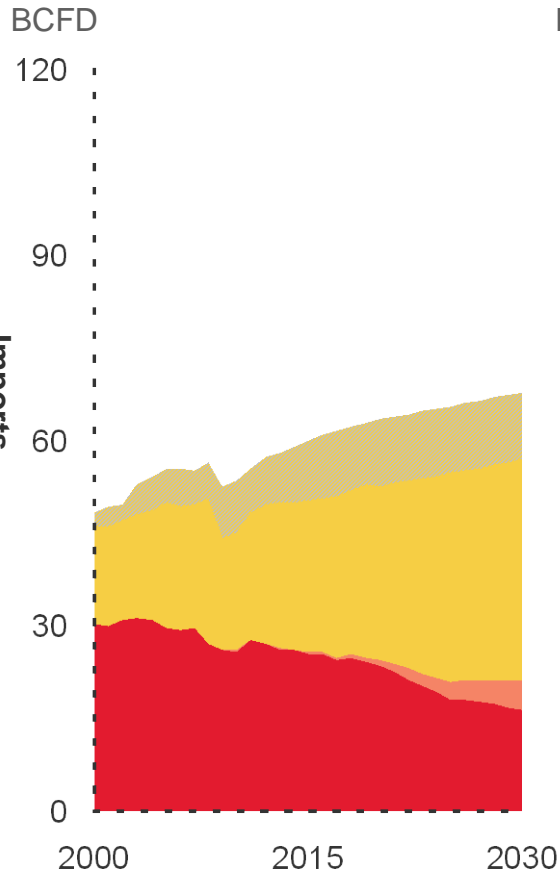
# Gas Supply and Demand Balance



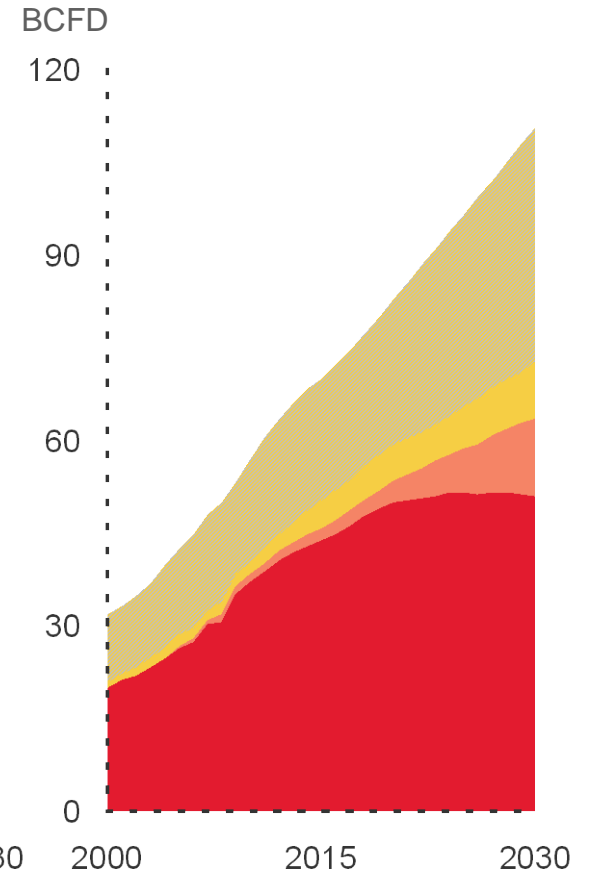
## United States



## Europe

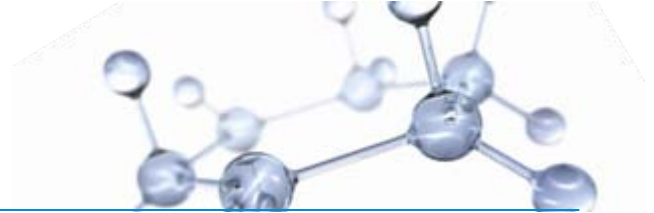


## Asia Pacific



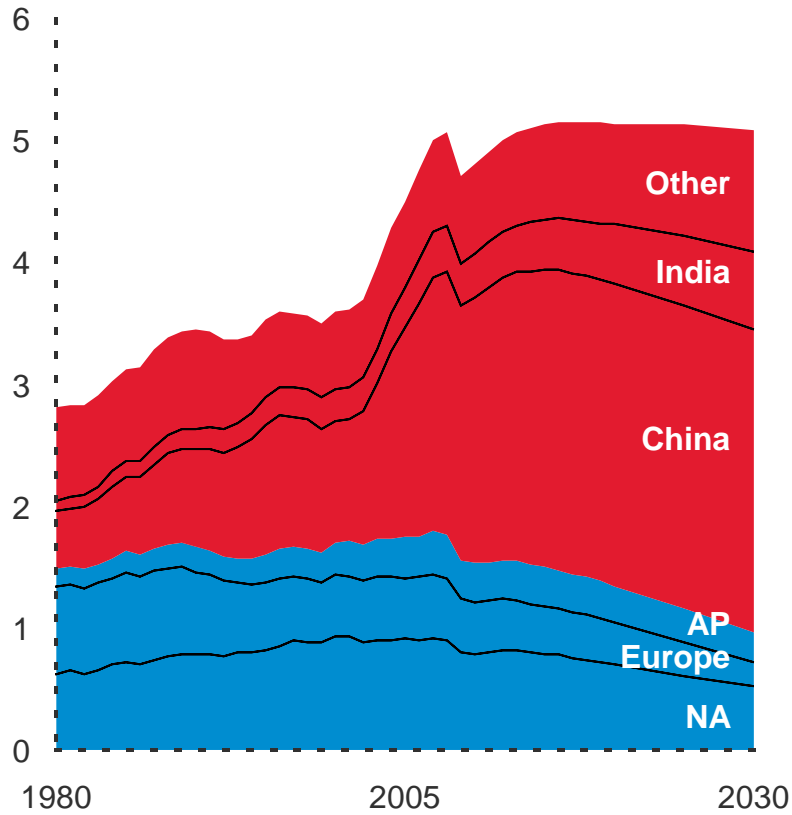
LNG: Liquefied Natural Gas

# Coal



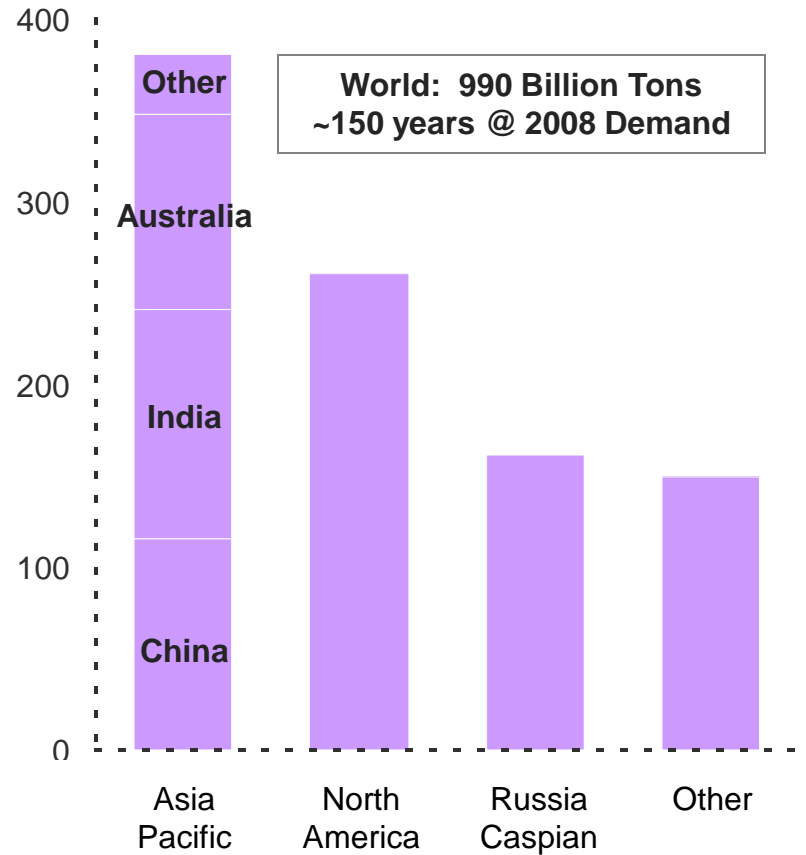
## Demand

Billion Tons

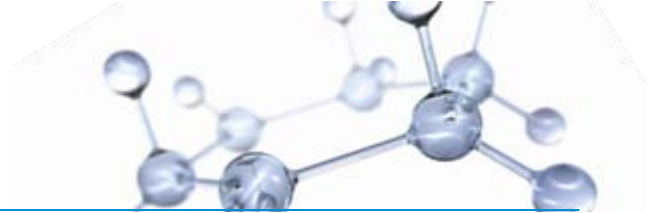


## Reserves

Billion Tons

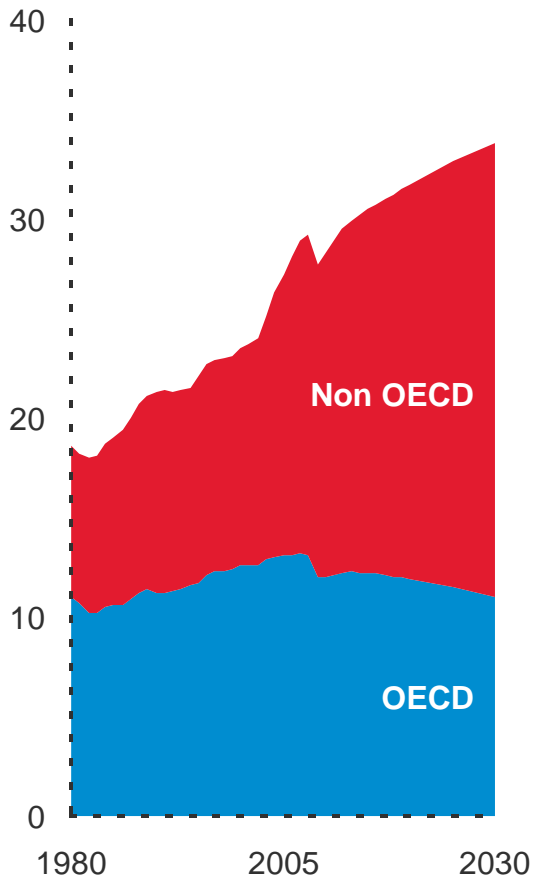


# CO<sub>2</sub> Emissions



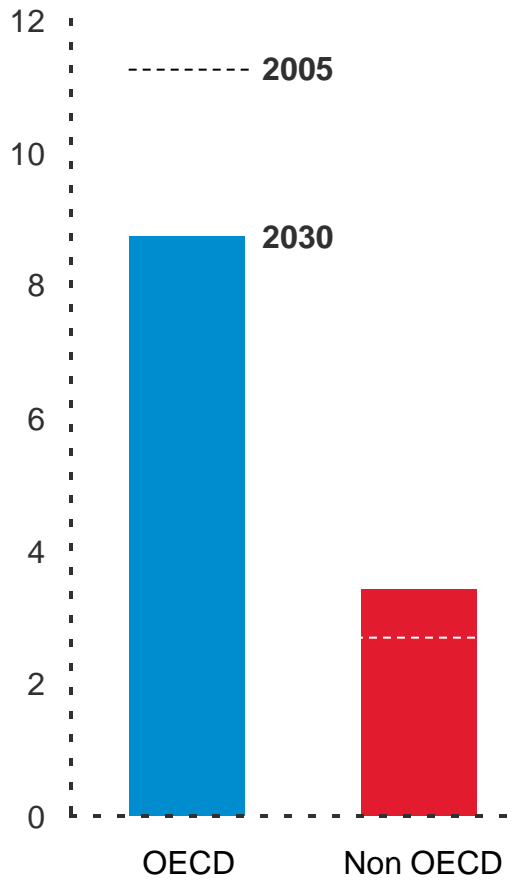
## CO<sub>2</sub> Emissions

Billion Tons



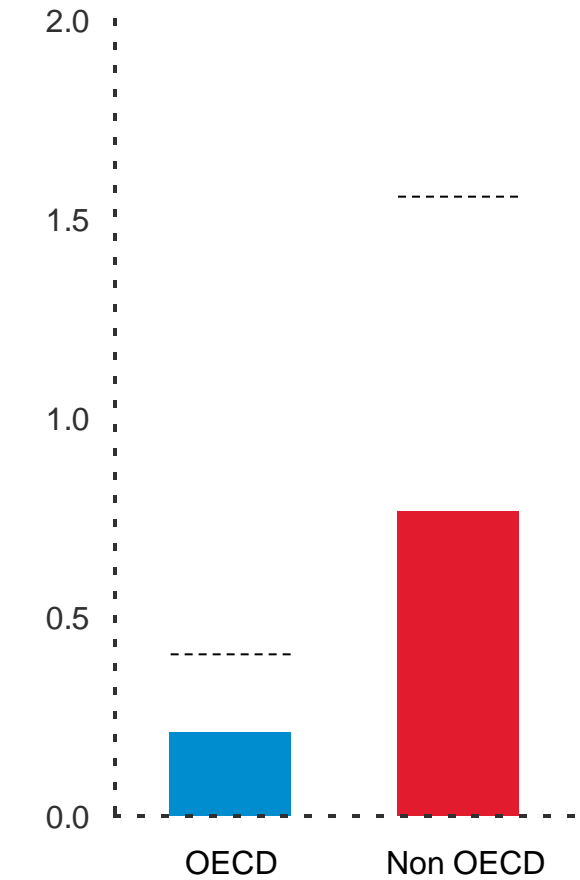
## Emissions per Capita

Tons / Person

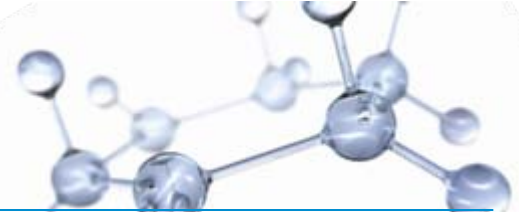


## Emissions per GDP

Tons / 2005\$ k GDP

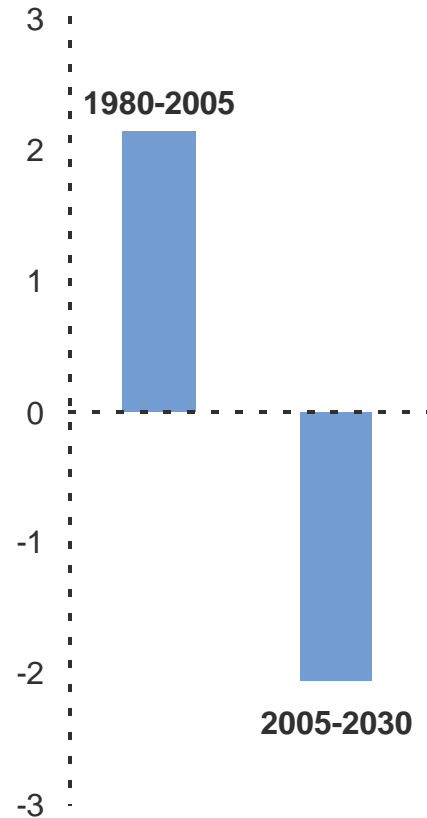


# OECD Transitions to Lower Emissions



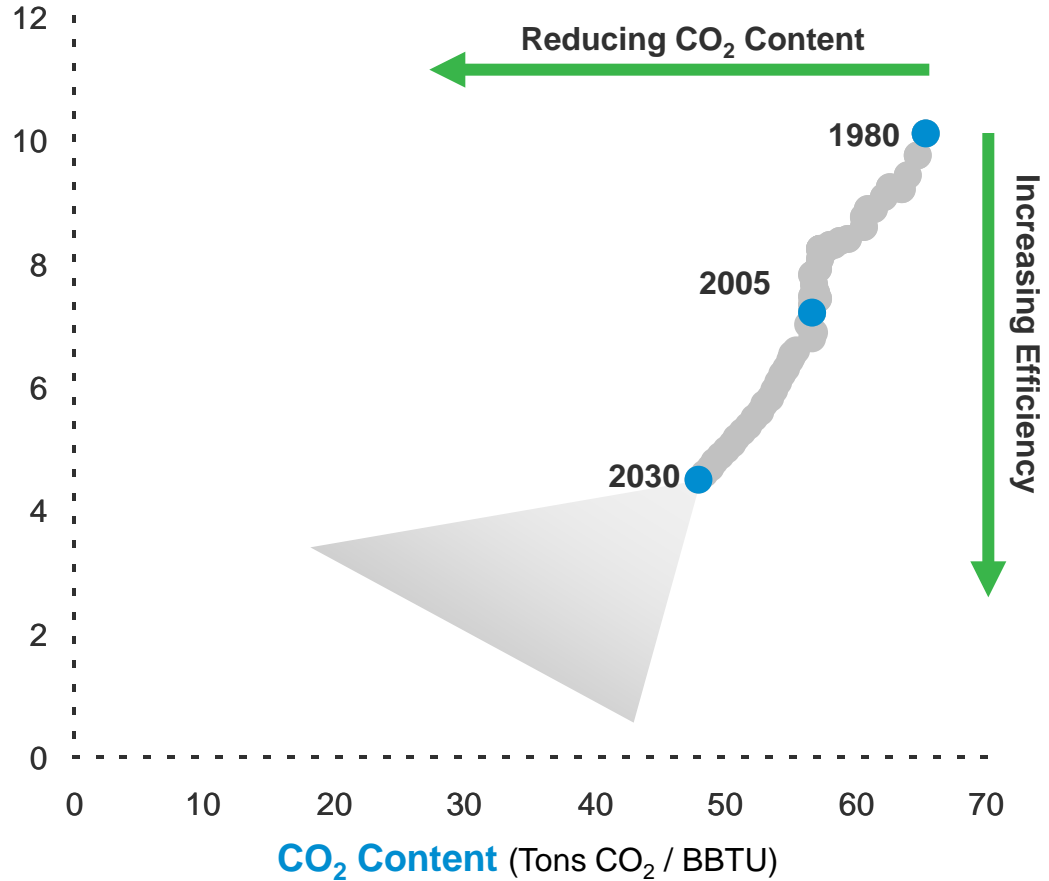
## Change in CO<sub>2</sub> Emissions

Billion Tons

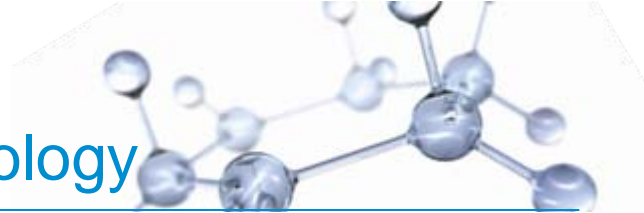


## Energy per GDP

MBTU / 2005\$ k GDP

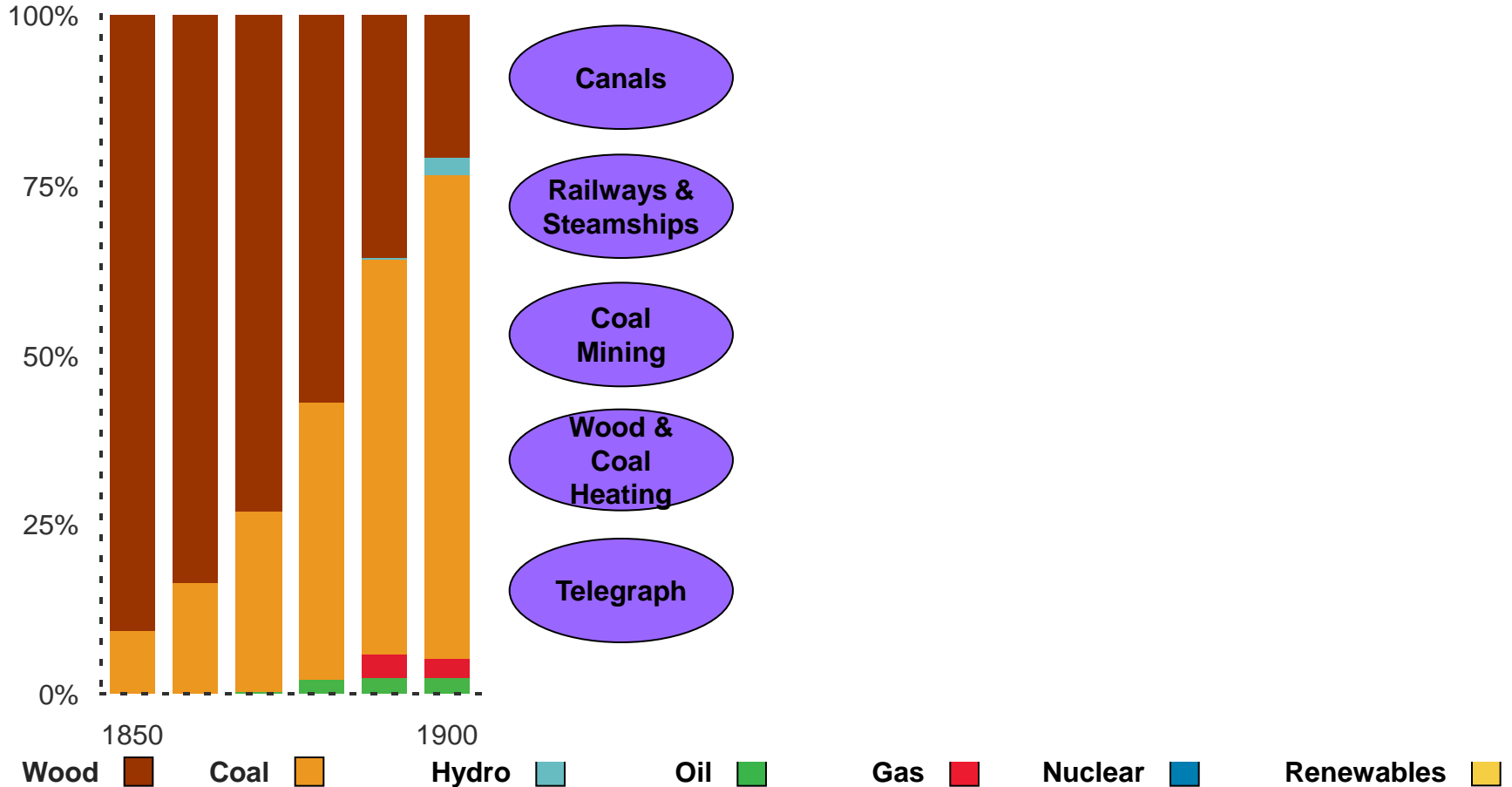


# Transition to Modern Energy / Technology



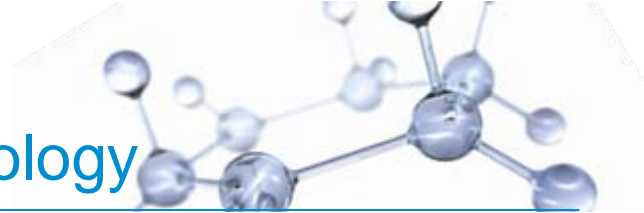
## US Energy Demand

Percent



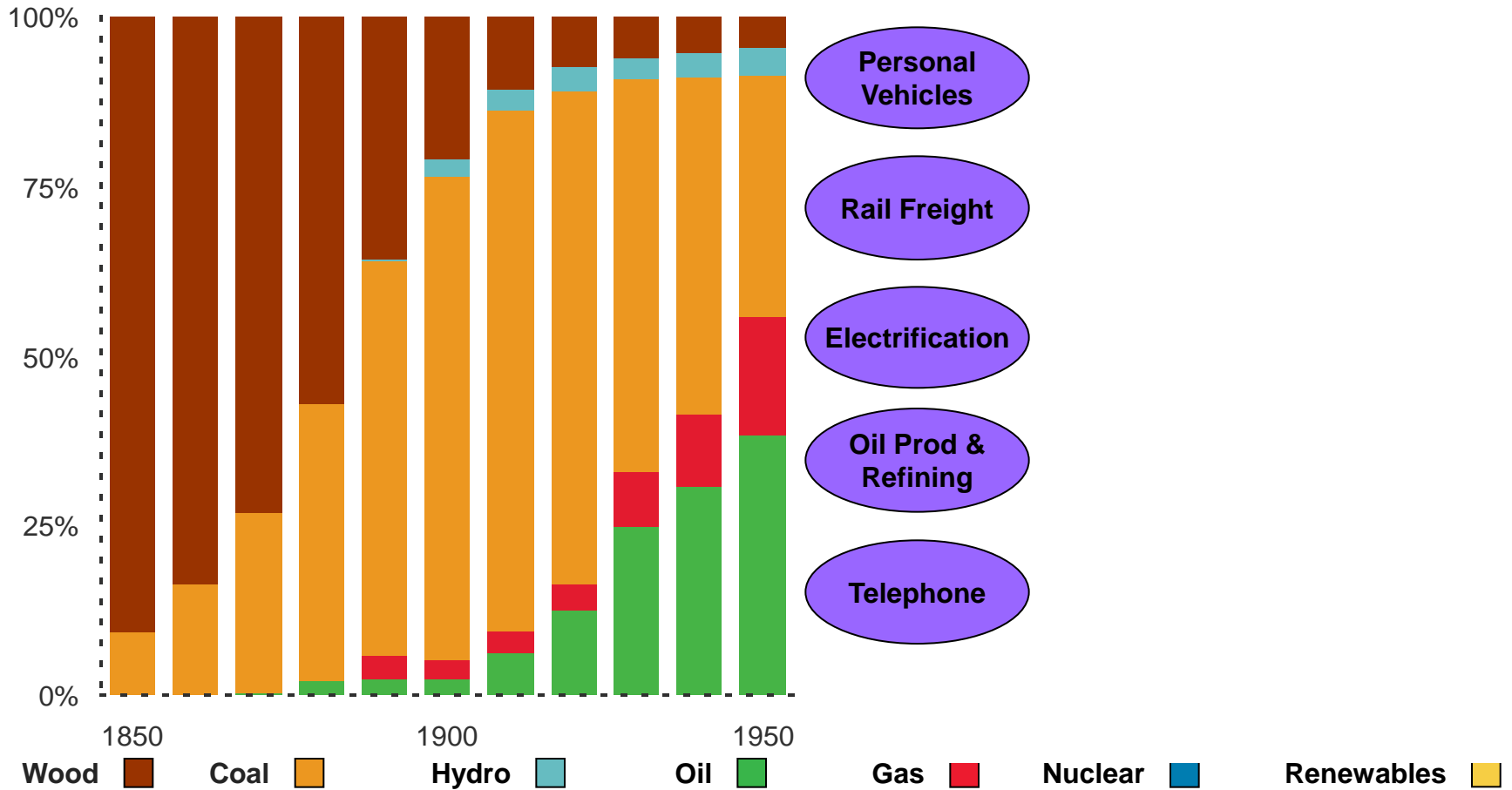
Energy Information Agency

# Transition to Modern Energy / Technology



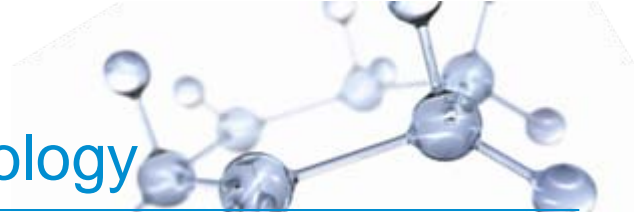
## US Energy Demand

Percent



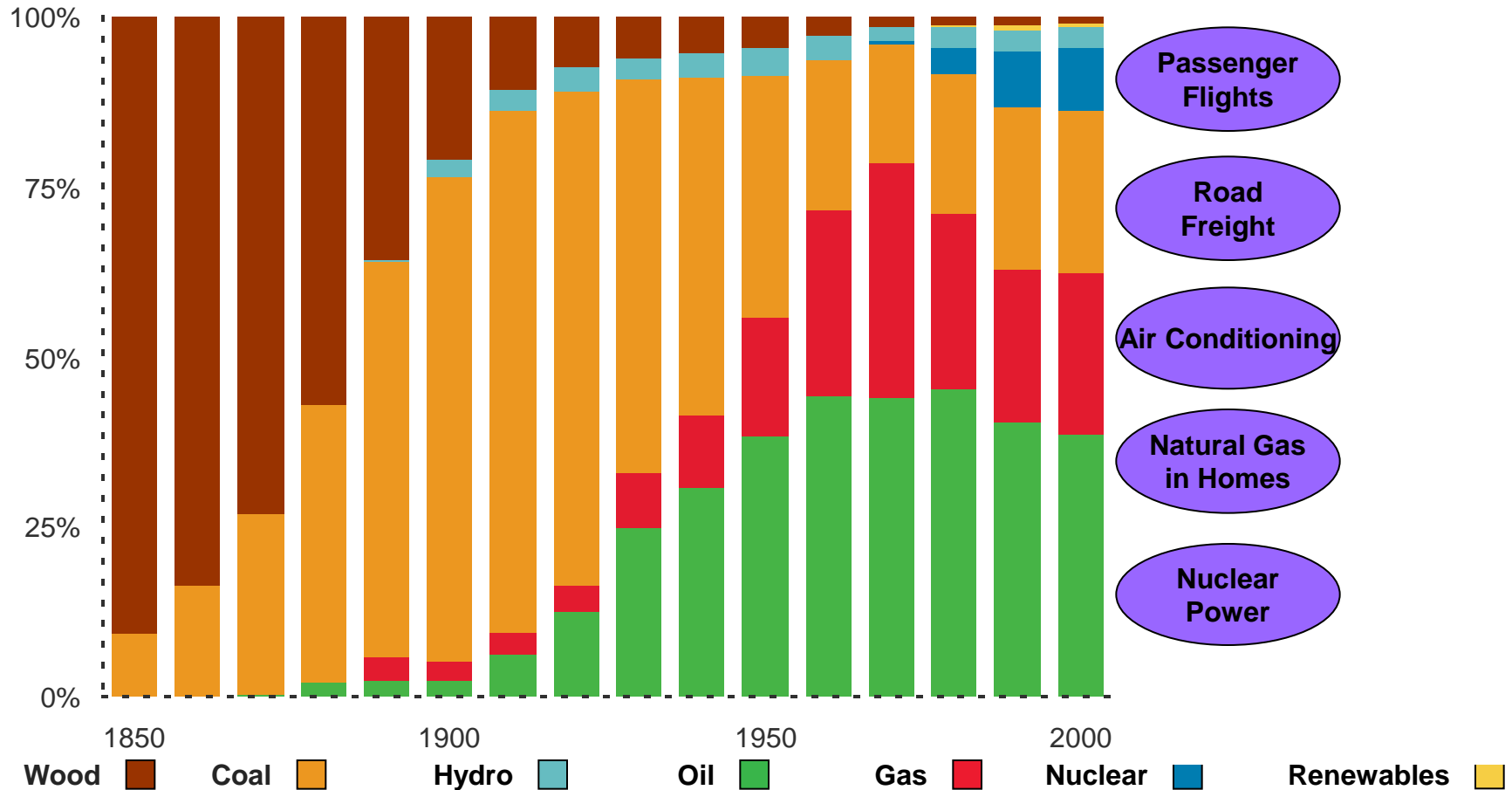
Energy Information Agency

# Transition to Modern Energy / Technology

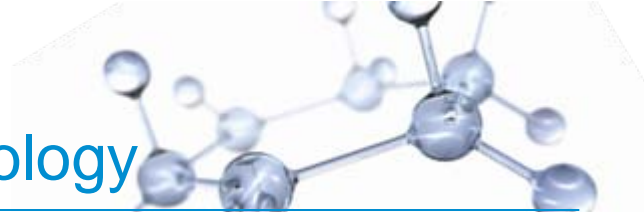


## US Energy Demand

Percent

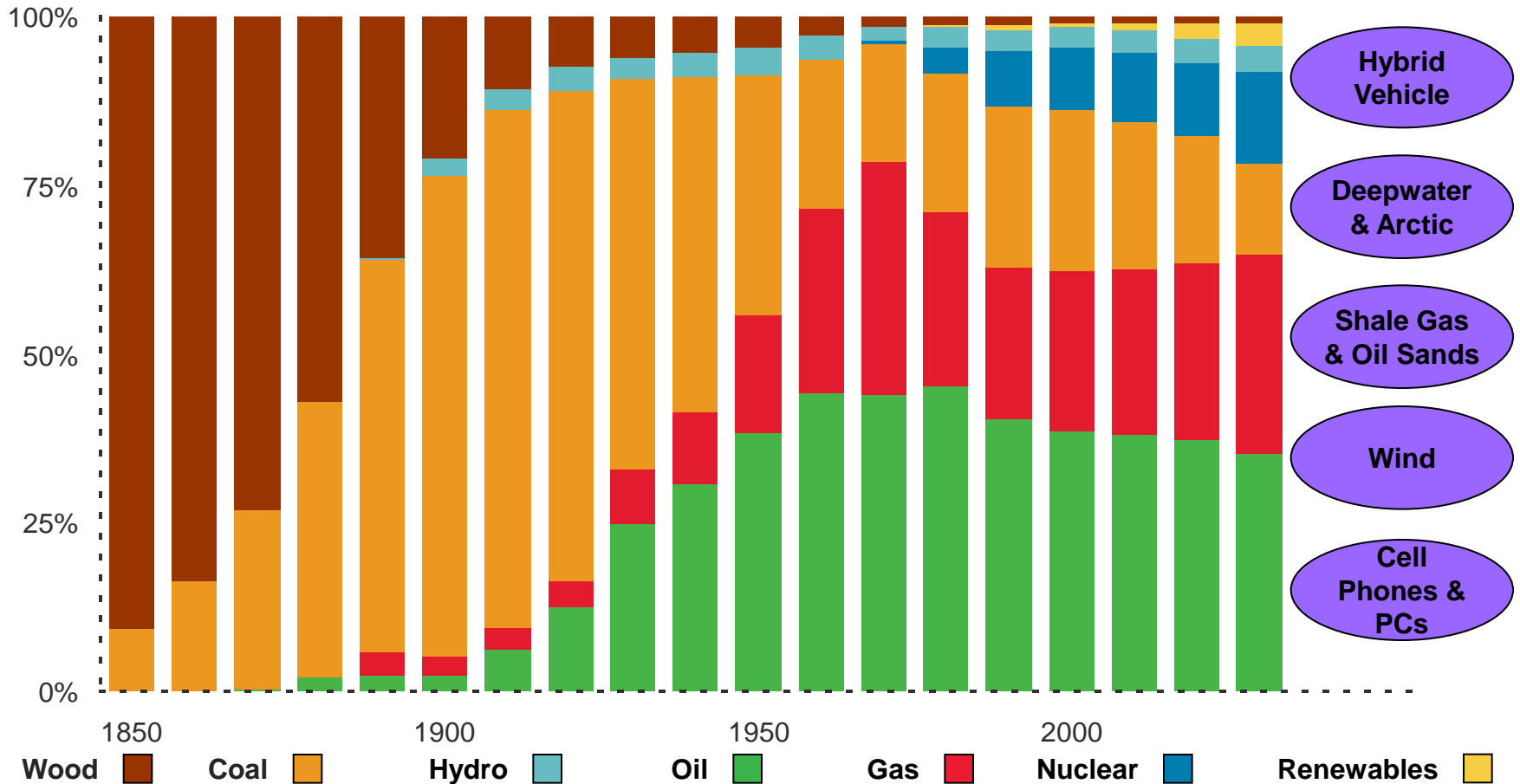


# Transition to Modern Energy / Technology



## US Energy Demand

Percent



# Integrated Energy Solutions



## Now

- 6.7 billion people
- Global economic linkages
- Disparate living standards
- Enormous energy needs
- Environmental gains & concerns
- Growing technology use & focus

Increase  
Efficiency

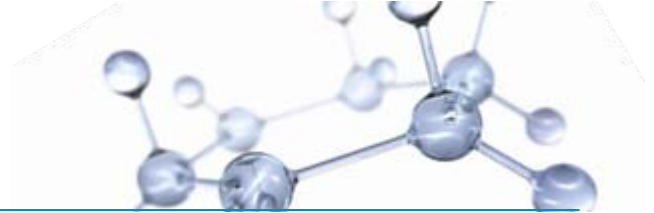
Expand  
Supply

Mitigate  
Emission  
s

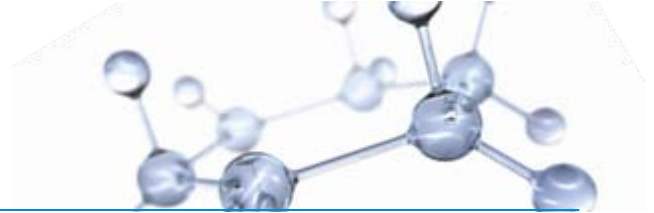
## 2030

- 8 billion people
- Non OECD leads economic growth
- Less poverty; living standards improve
- Global energy needs up one-third
- Progress on environmental goals
- Significant advances in technology

# Integrated Energy Solutions

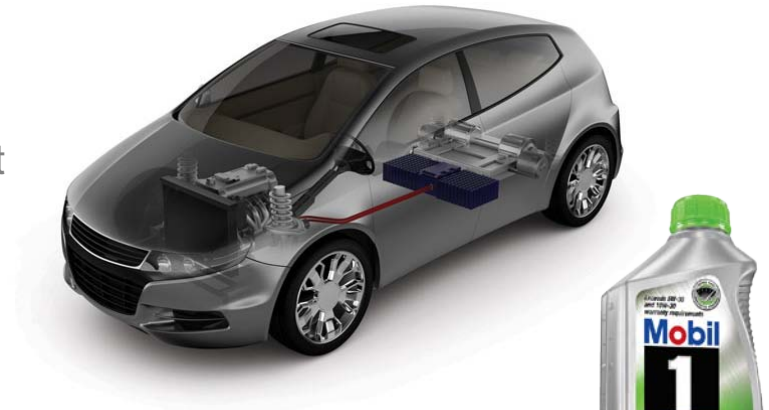


# ExxonMobil: improving efficiency



- **Lithium-ion battery technology**

Innovative film separator could help put more fuel-efficient hybrid and plug-in electric vehicles on the road



- **Advanced synthetic lubricants**

Mobil 1 AFE can improve fuel economy by up to 2 percent<sup>[1]</sup> versus most commonly used motor oils



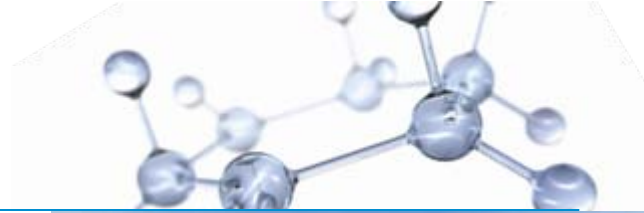
- **Cogeneration**

Process used at about 100 plants<sup>[2]</sup> worldwide to capture and use heat generates electric power up to 50% more efficiently than local utilities



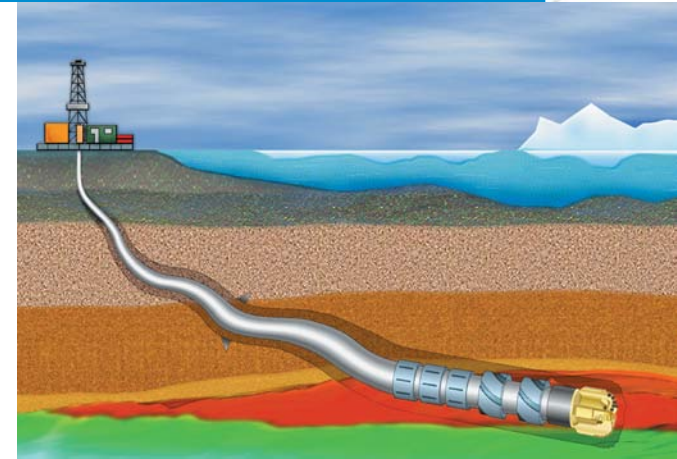
[1] Actual savings are dependent upon vehicle/engine type, outside temperature, driving conditions, and current engine oil viscosity. [2] In which ExxonMobil has interests.

# ExxonMobil: expanding supplies



- **Directional drilling**

Record-setting horizontal wells stretching 7+ miles enable us to produce more oil with less environmental impact



- **Unconventional and liquefied natural gas**

Multi-Zone Stimulation Technology™, allows us to produce “tight gas”; large-scale Q-Max tankers allow us to safely and efficiently deliver natural gas to markets worldwide.

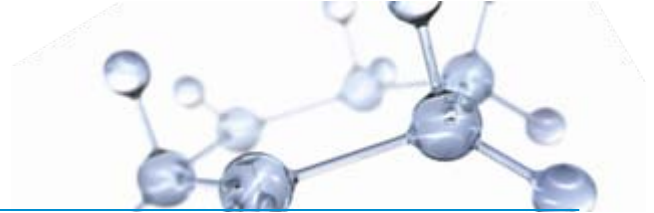


- **Algae biofuels**

ExxonMobil is investing up to \$600 million to develop oils that are compatible with existing transportation technology and infrastructure from photosynthetic, CO<sub>2</sub>-consuming algae



# ExxonMobil: reducing emissions



- **Natural gas**

ExxonMobil is a global leader in production of natural gas, electricity from natural gas emits up to 60 percent less CO<sub>2</sub> than coal

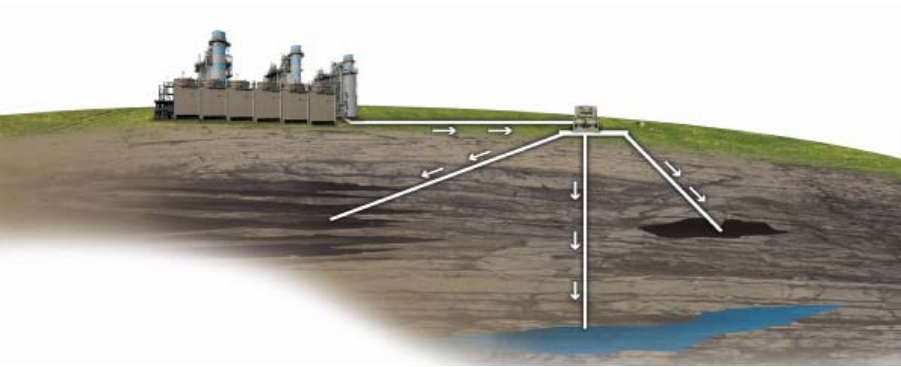
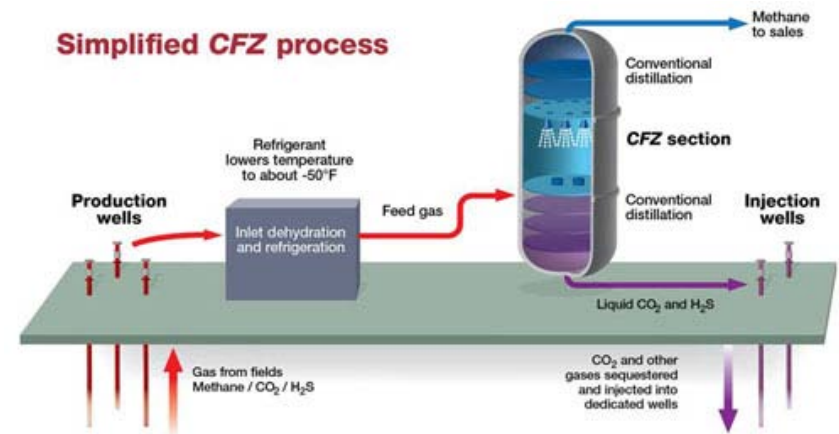


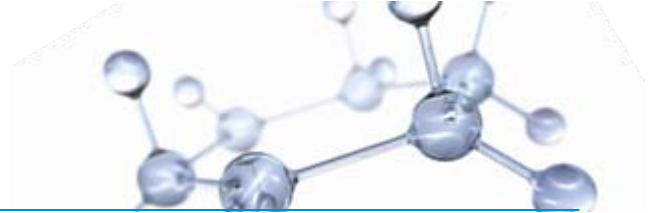
- **Controlled Freeze Zone™**

This technology, which reduces the cost and complexity of separating CO<sub>2</sub> from produced natural gas, could help carbon capture and storage systems reduce GHG

- **Carbon capture and storage**

As a leader in CCS, ExxonMobil has captured up to 4 million metric tons of CO<sub>2</sub> per year in Wyoming, and partnered to store 10 million metric tons in the North Sea.





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# ExxonMobil™