

The Outlook for Energy: A View to 2040

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October 16, 2015

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 publicly-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.

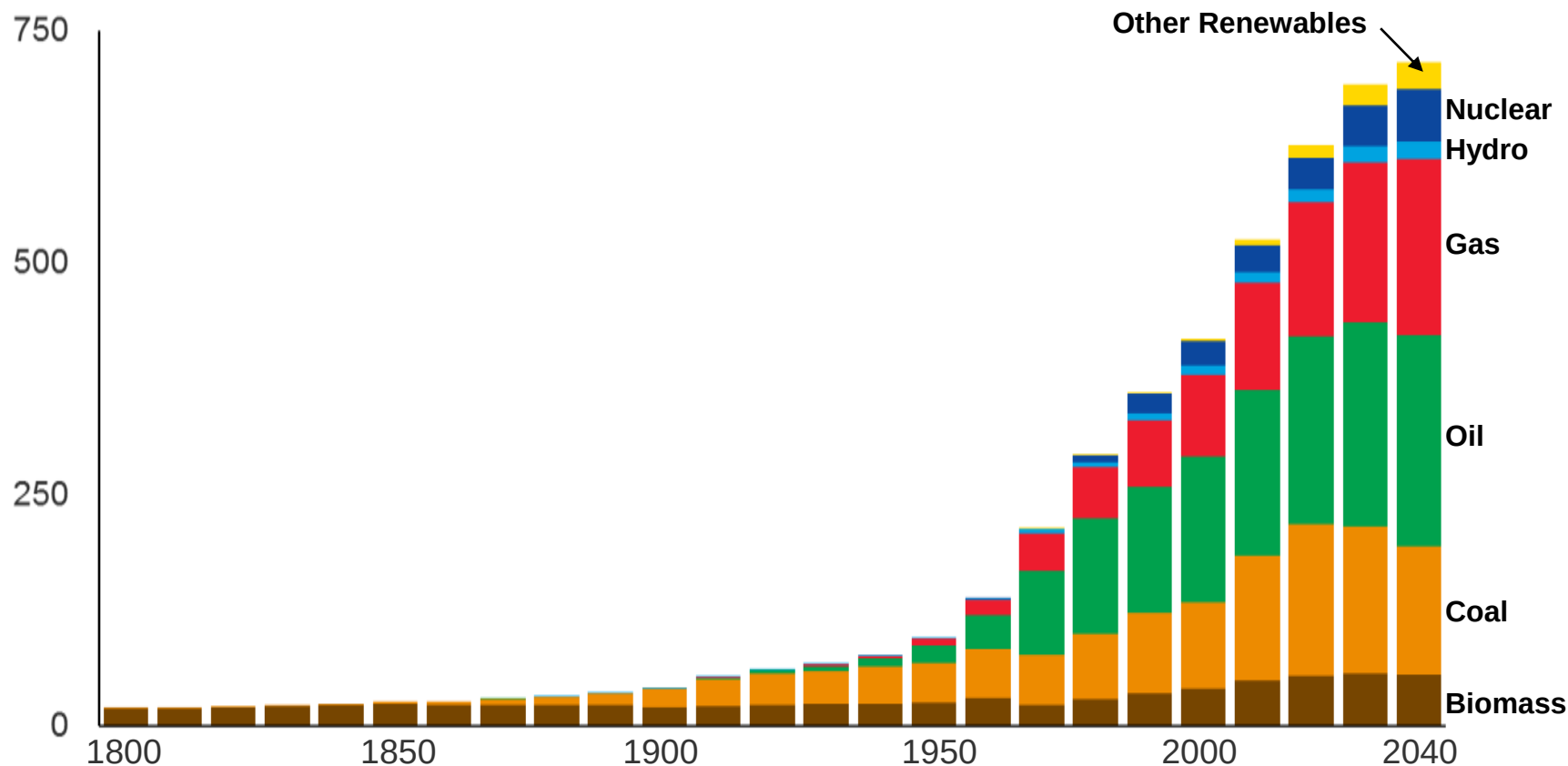


ExxonMobil
Energy lives here™

Energy Use Evolves Over Time

Global Mix of Fuels

Quadrillion BTUs



Source: Smil, *Energy Transitions (1800-1960)*

Energy Outlook Development

100 countries

**15 demand
sectors**

**trade
flows**

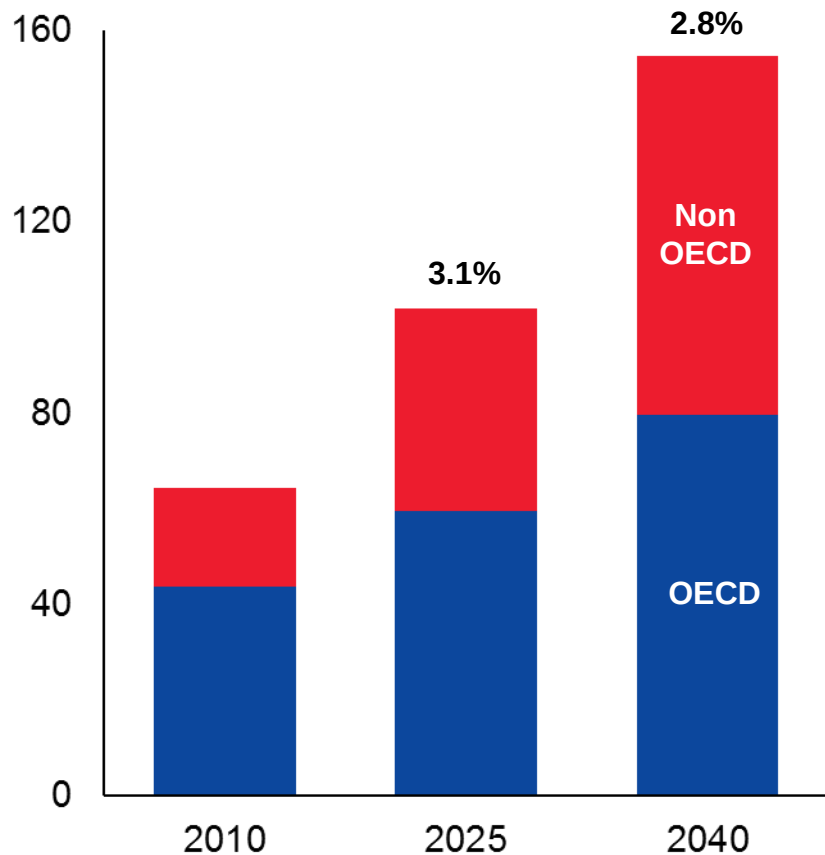
**20 fuel
types**

technology & policy

GDP Growth Varies By Region

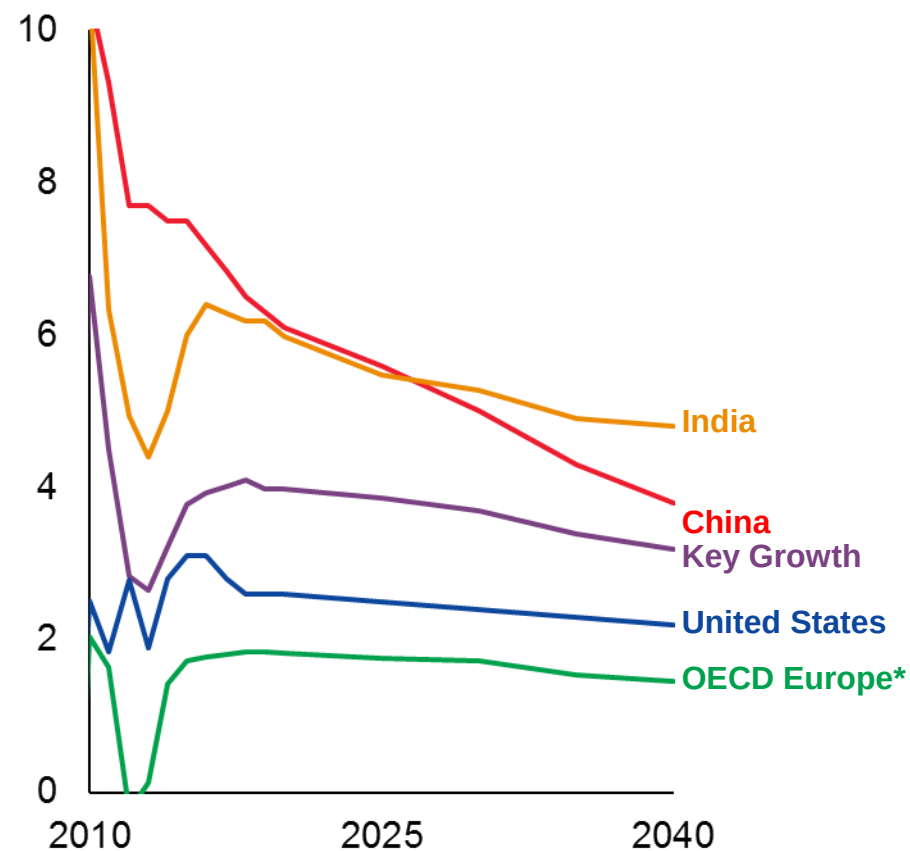
World GDP by Region

Trillion 2010\$



GDP Growth Rate

Y/Y Percent

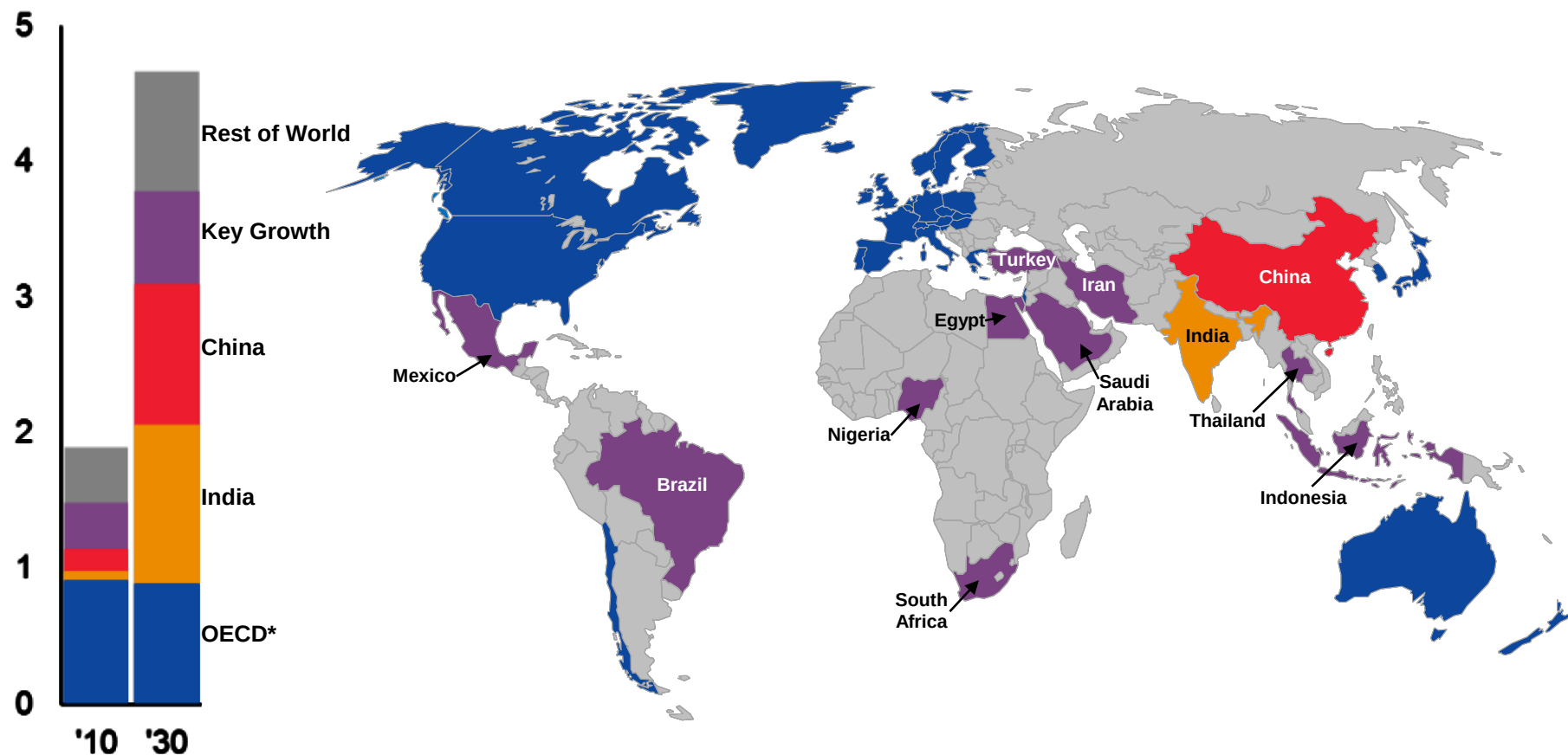


*Turkey included in Key Growth countries

The Middle Class Continues to Grow

Middle Class per The Brookings Institution

Billion People

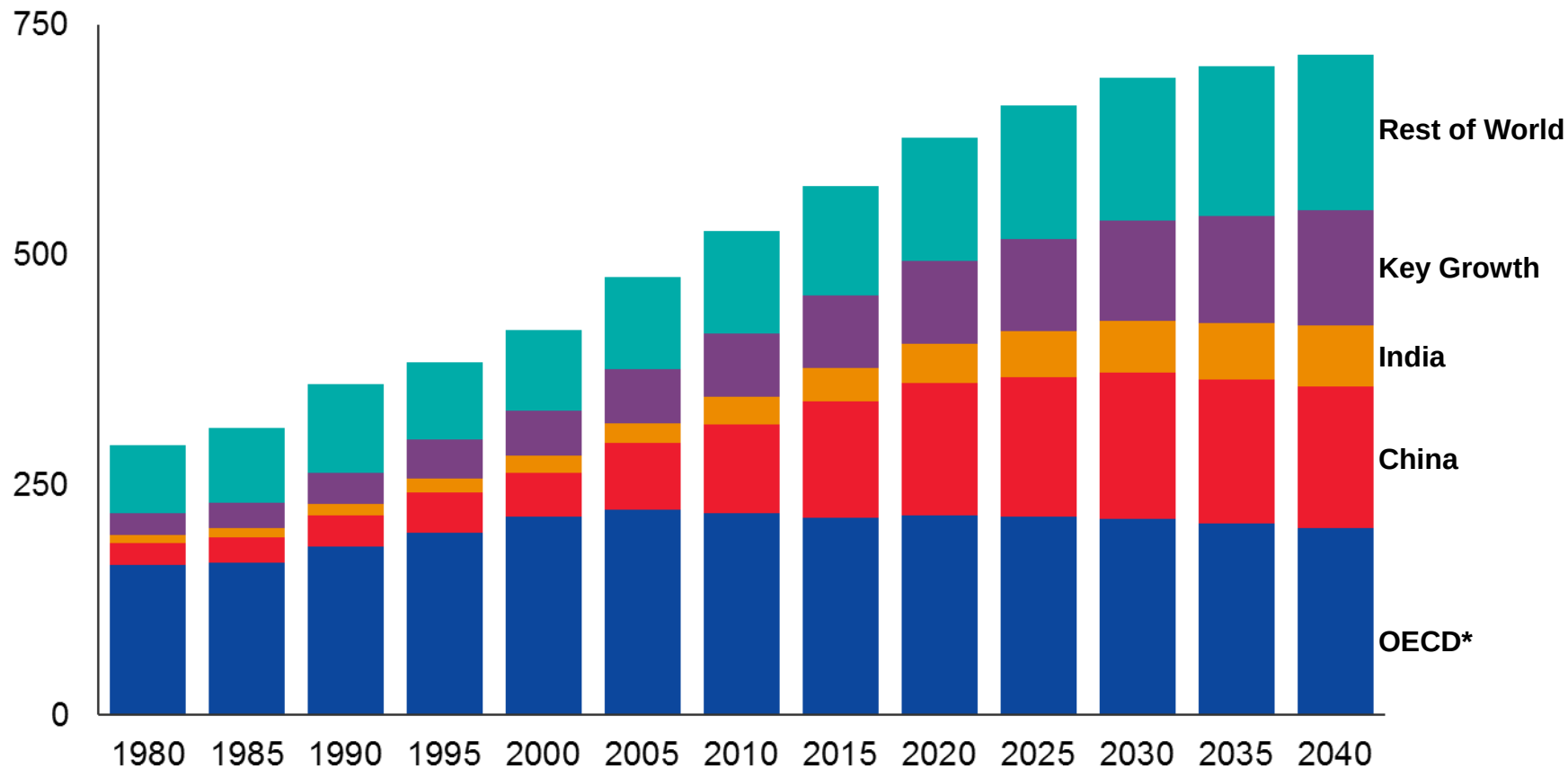


*Mexico and Turkey included in Key Growth countries

Developing Economies Dominate Growth

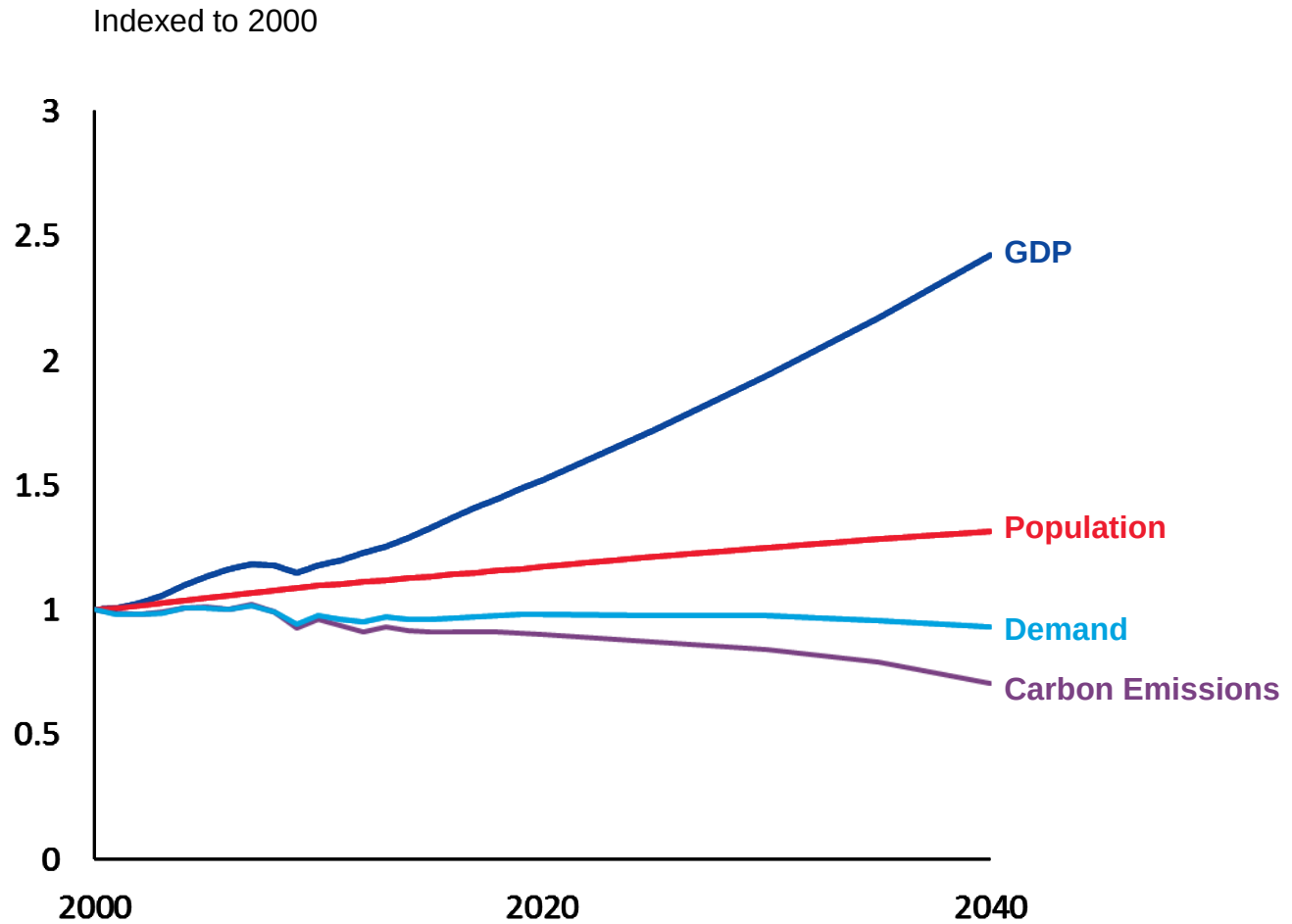
Demand by Region

Quadrillion BTUs



**Mexico and Turkey included in Key Growth countries*

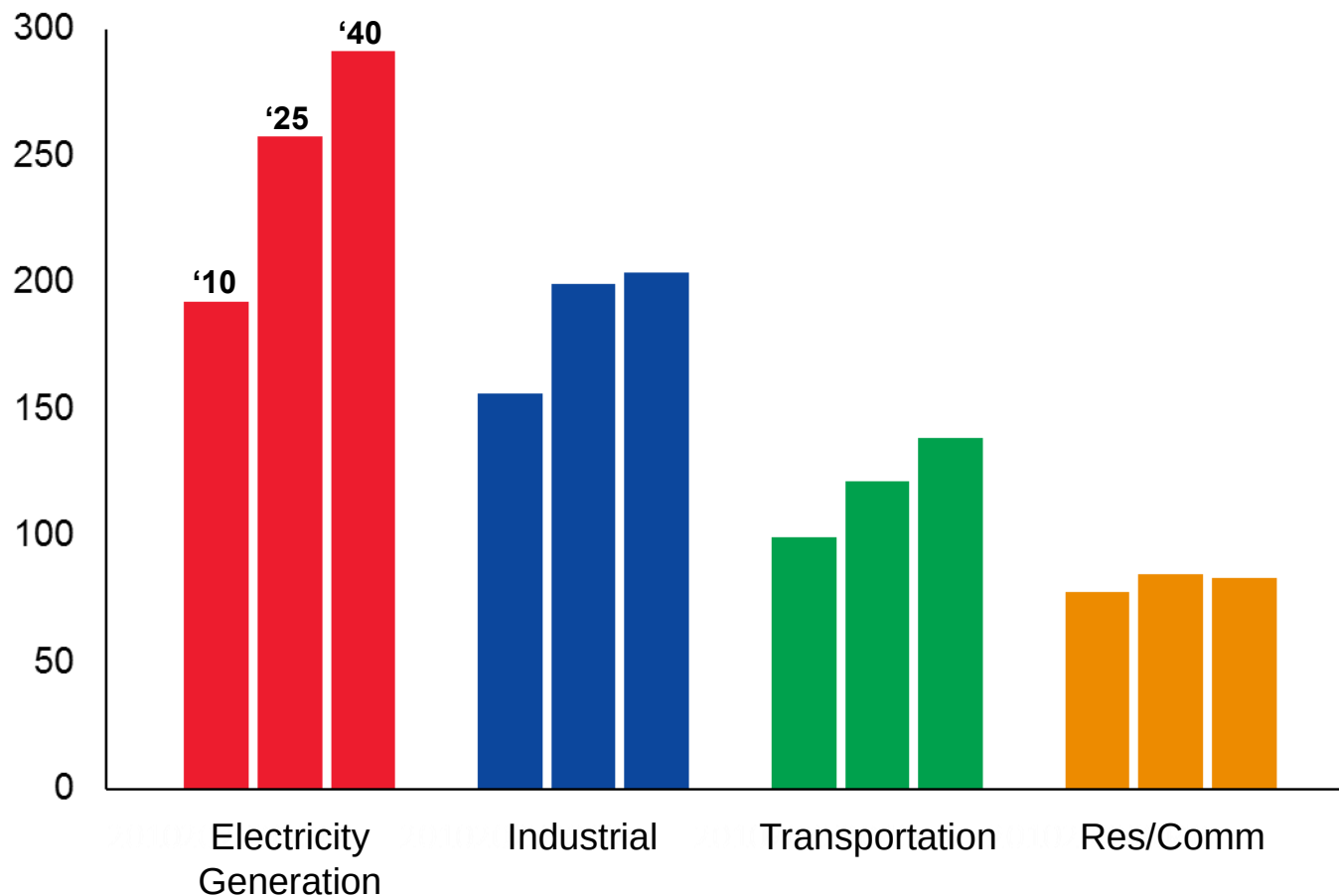
U.S. Energy Trends



Electricity Generation Leads Growth

Primary Energy Demand by Sector

Quadrillion BTUs



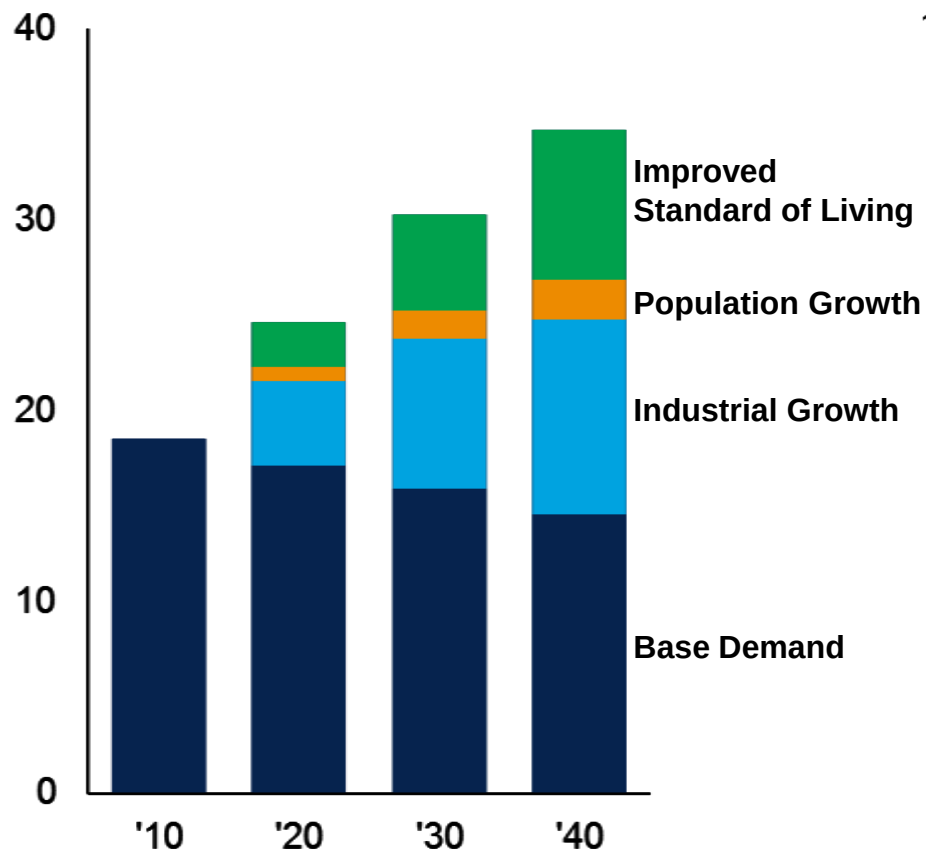
Electricity Generation



Electricity Demand

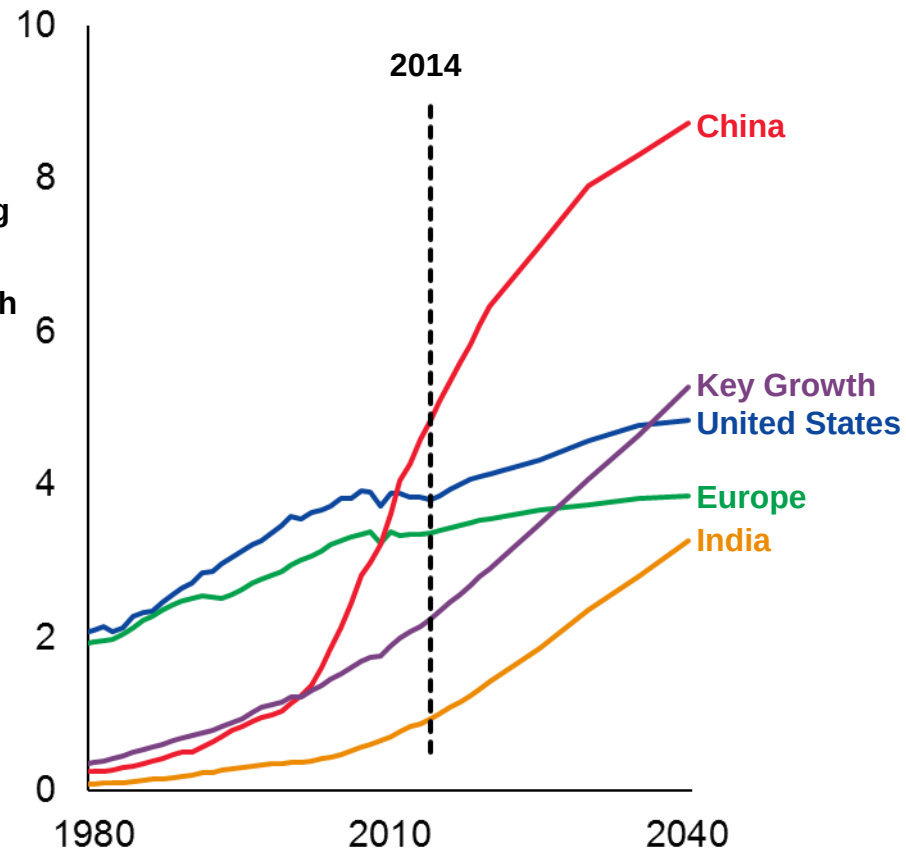
Electricity Demand

Thousand TWh



Electricity Demand by Region

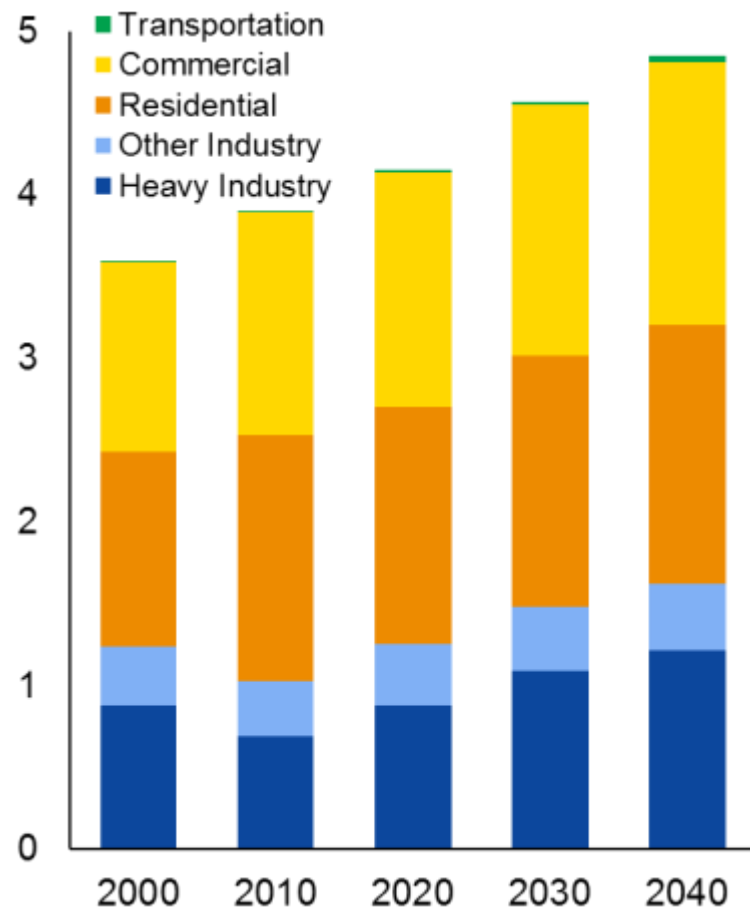
Thousand TWh



United States Electricity Demand

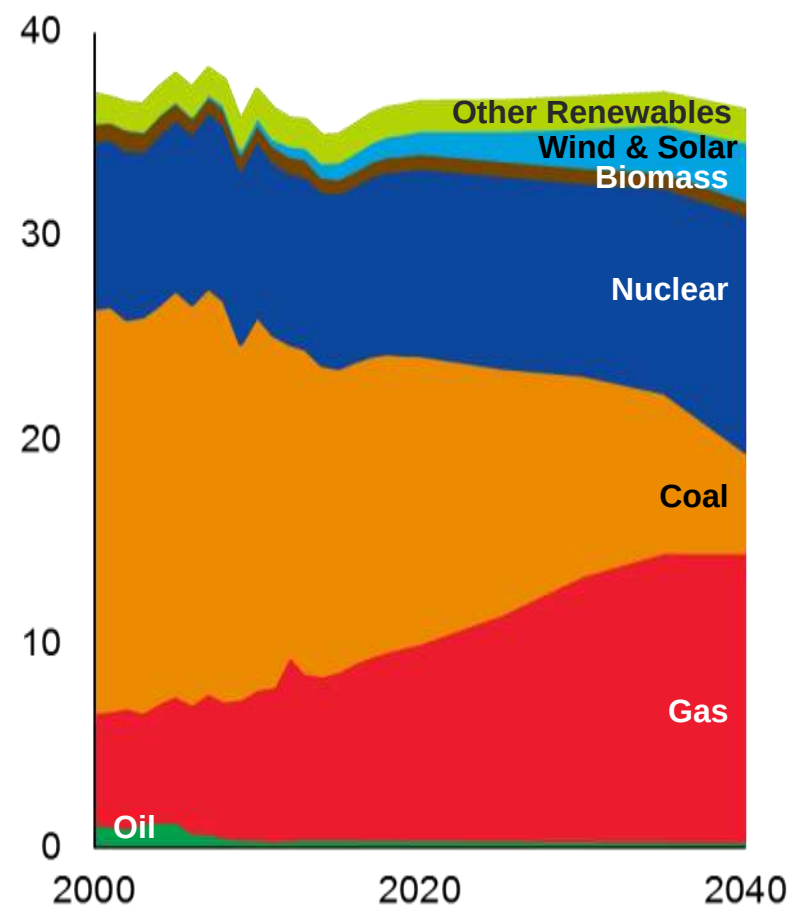
Electricity Demand

Thousand Terawatt Hour

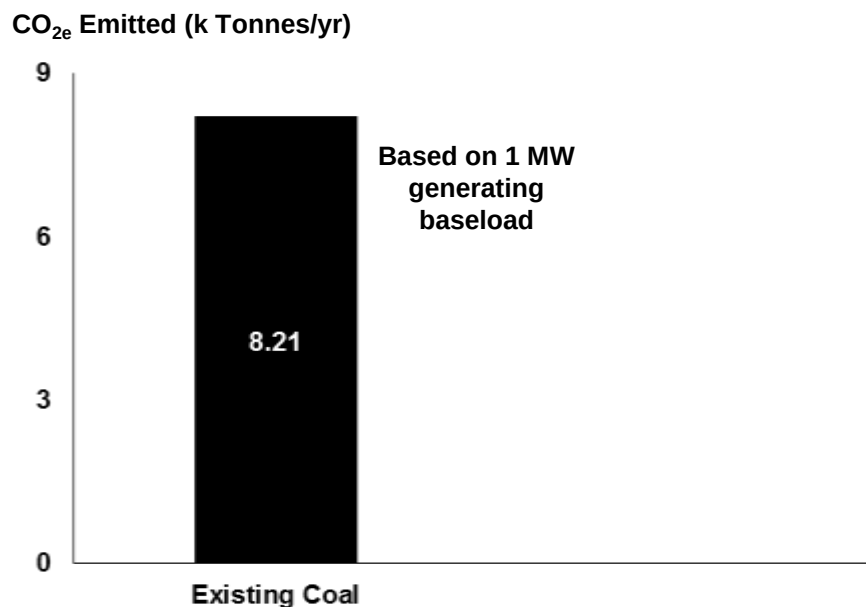


Electricity Generation Fuel Consumption

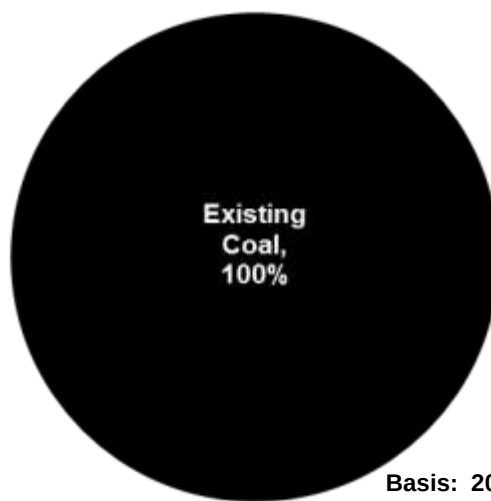
Quadrillion BTUs



U.S. CO_{2e} Emissions from Coal Plants

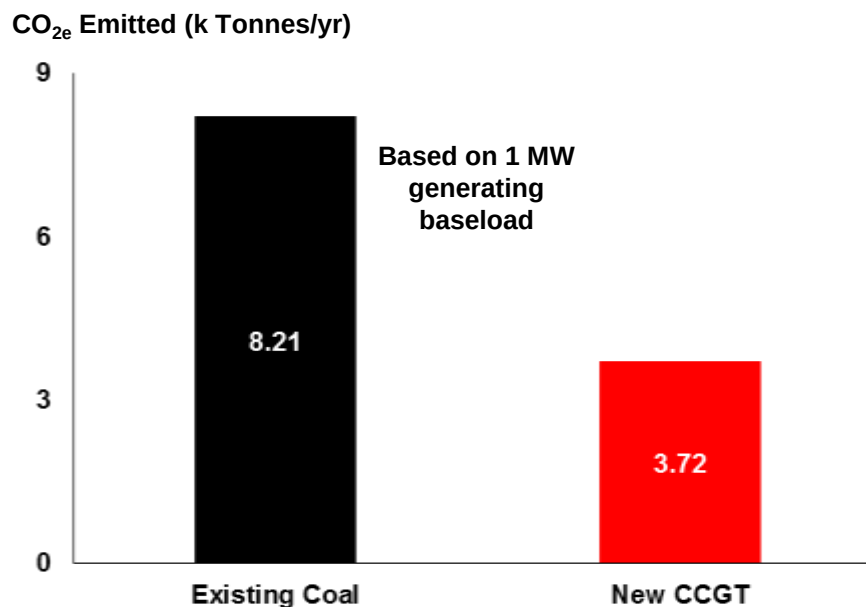


Relative Operating Time

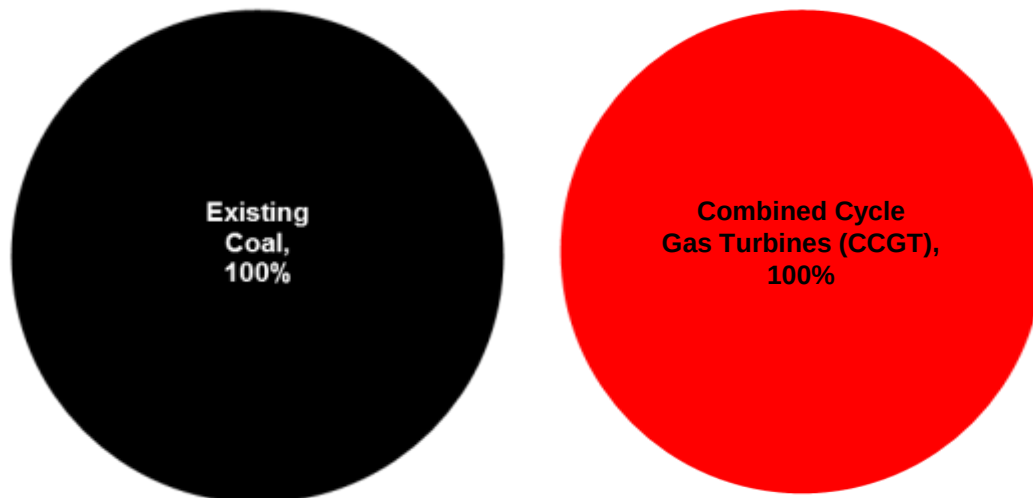


Basis: 2012 NETL; ExxonMobil

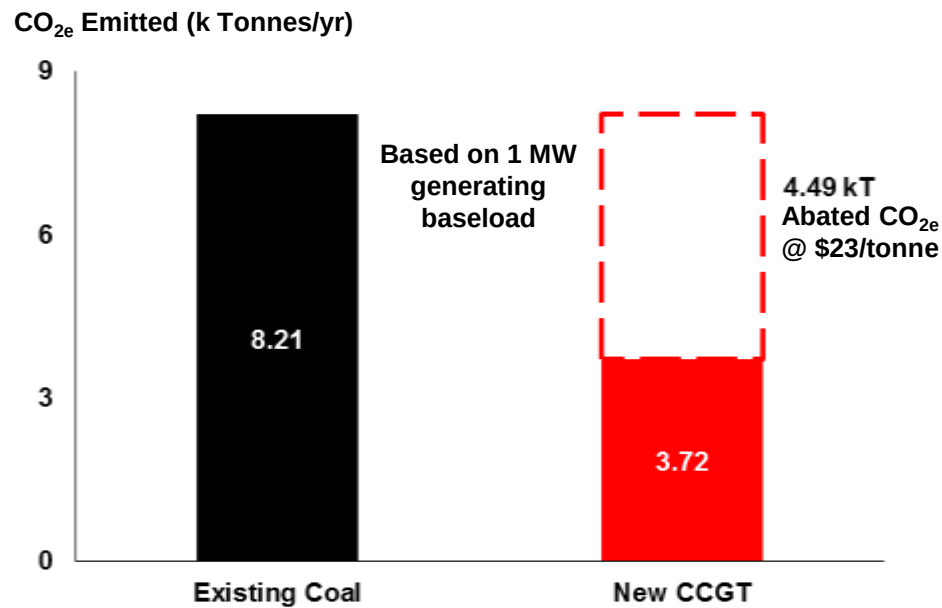
U.S. CO_{2e} Abatement using Natural Gas



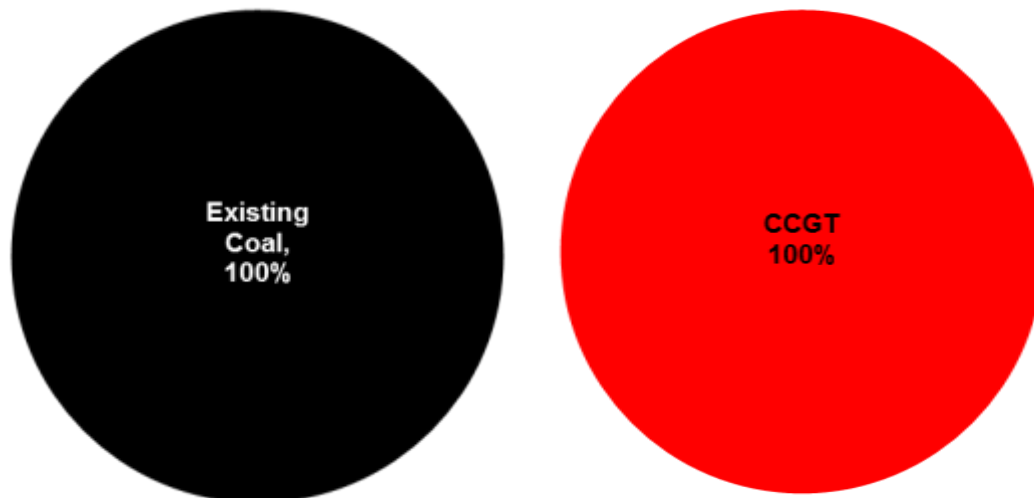
Relative Operating Time



U.S. CO_{2e} Abatement using Natural Gas



Relative Operating Time



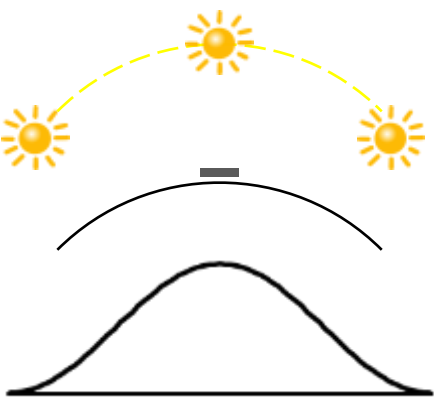
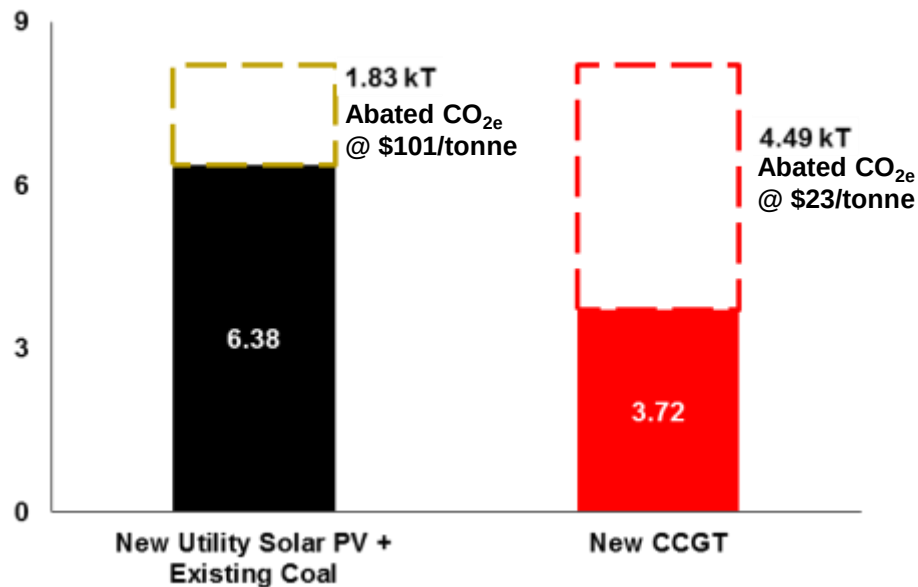
ExxonMobil

Basis: NETL; ExxonMobil

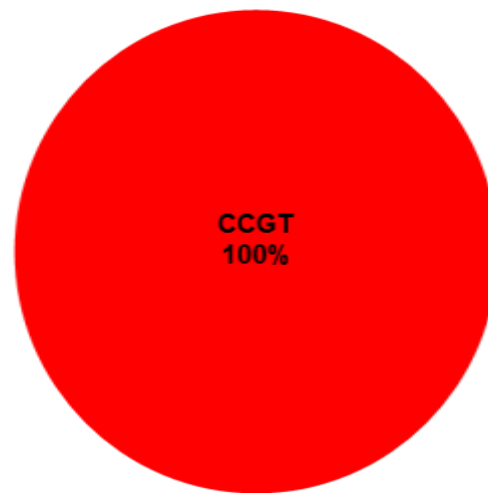
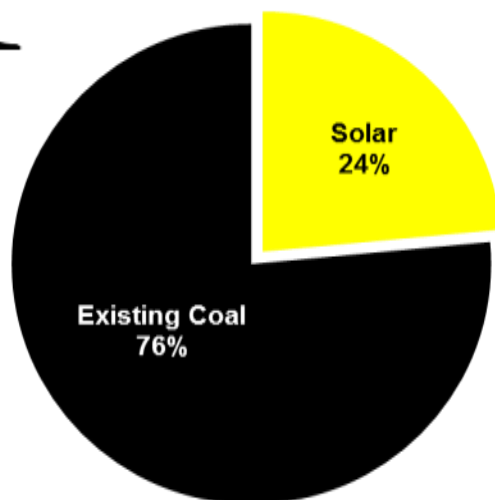
ExxonMobil 2015 Outlook for Energy

U.S. CO_{2e} Abatement with Utility Solar

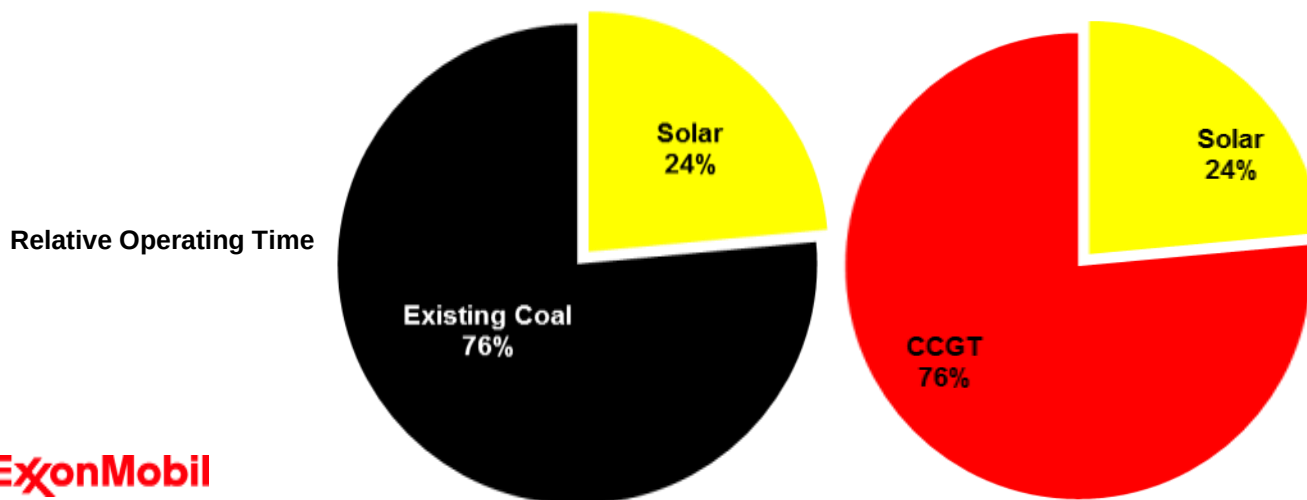
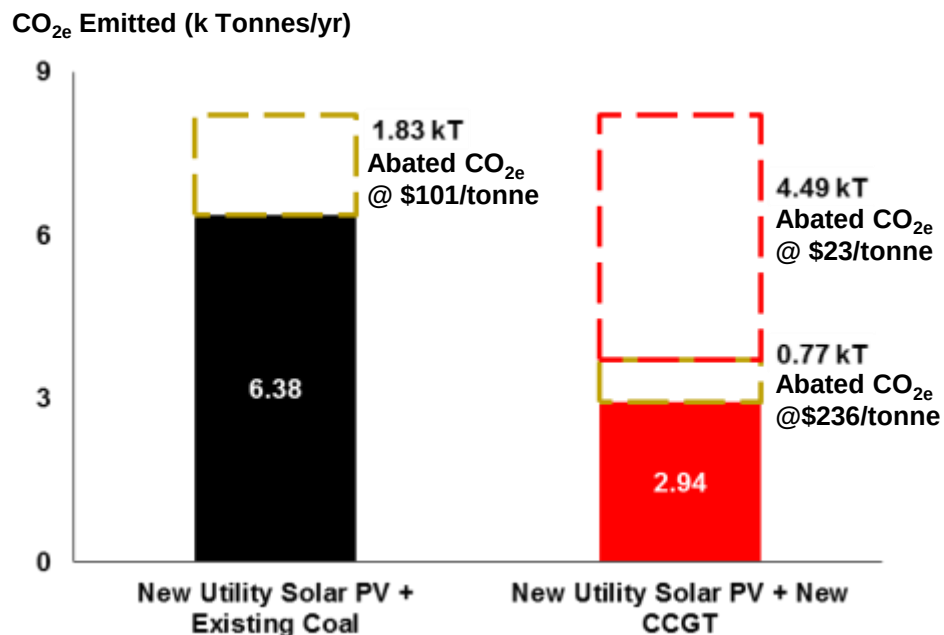
CO_{2e} Emitted (k Tonnes/yr)



Relative Operating Time

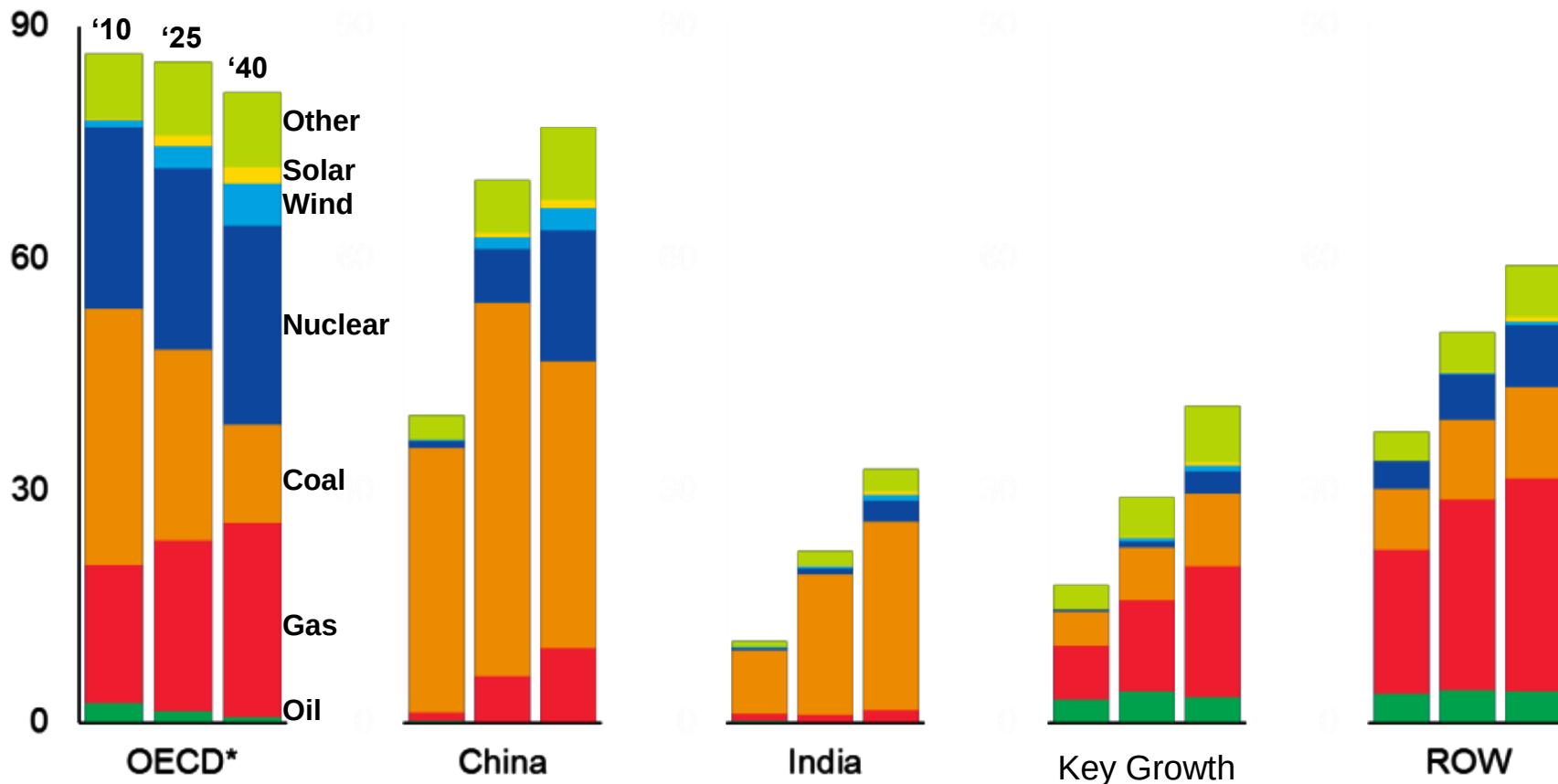


U.S. CO_{2e} Abatement Solar with Gas



Electricity Generation Fuel by Region

Quadrillion BTUs



*Mexico and Turkey included in Key Growth countries

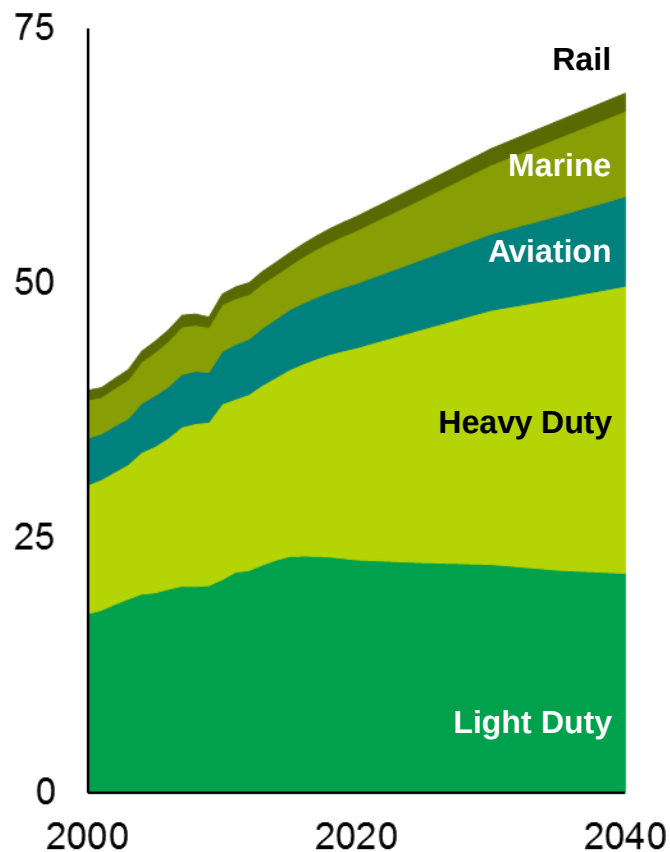
Transportation



Transportation Demand

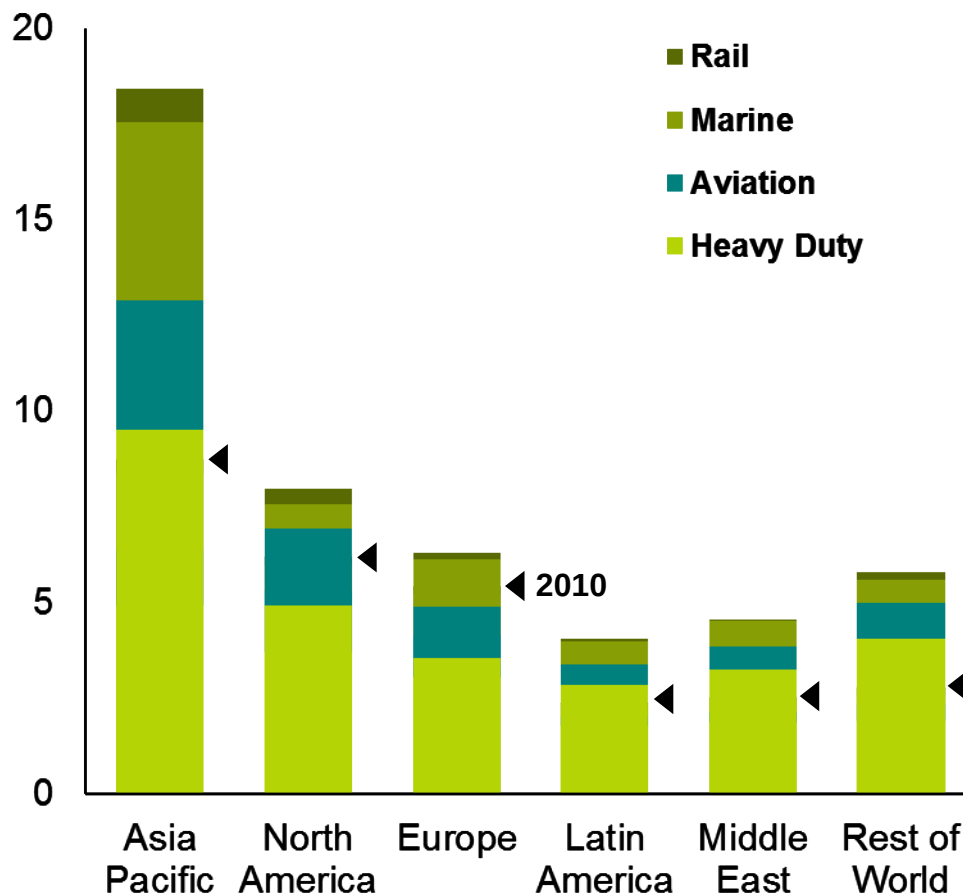
Sector Demand

MBDOE



Commercial Transportation by Region - 2040

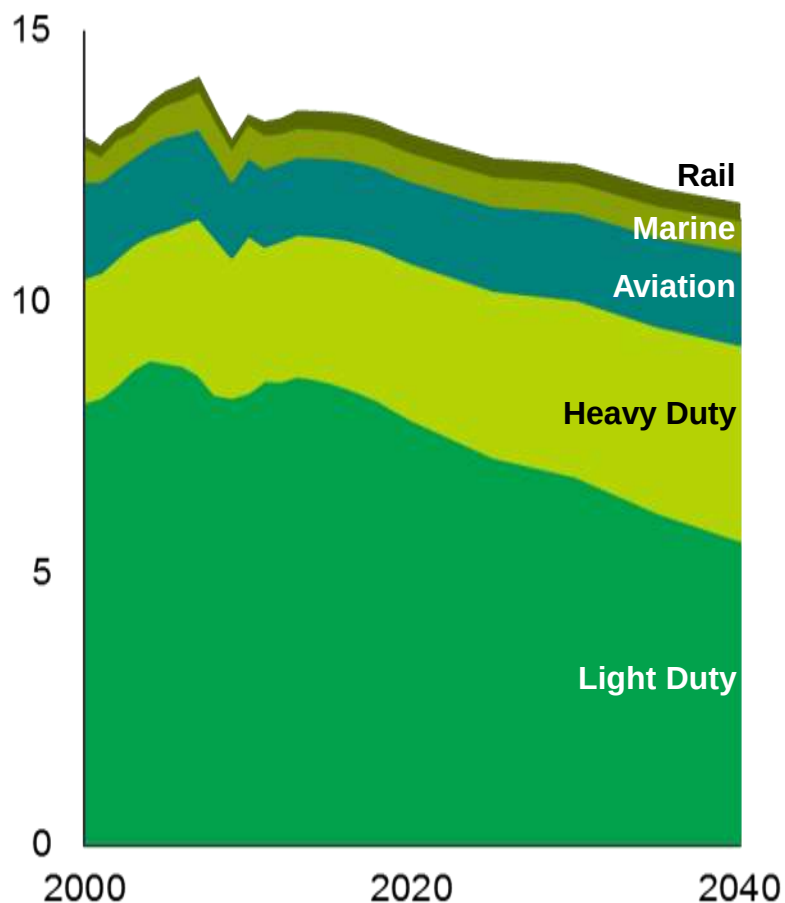
MBDOE



U.S. Transportation Demand & Fleet Shift

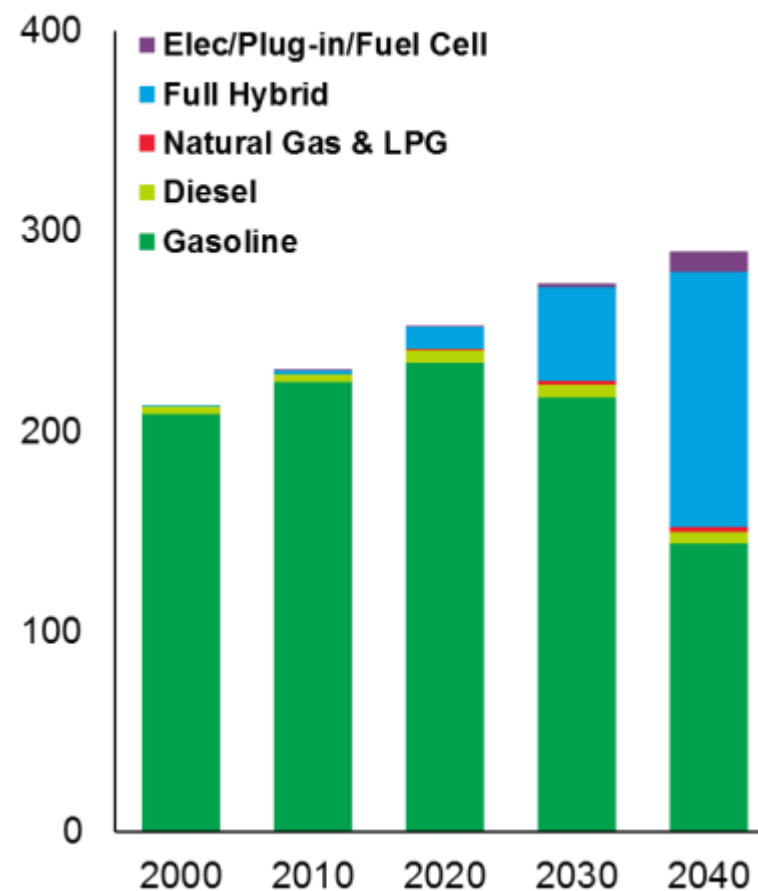
Transportation Demand

MBDOE



Light Duty Vehicles

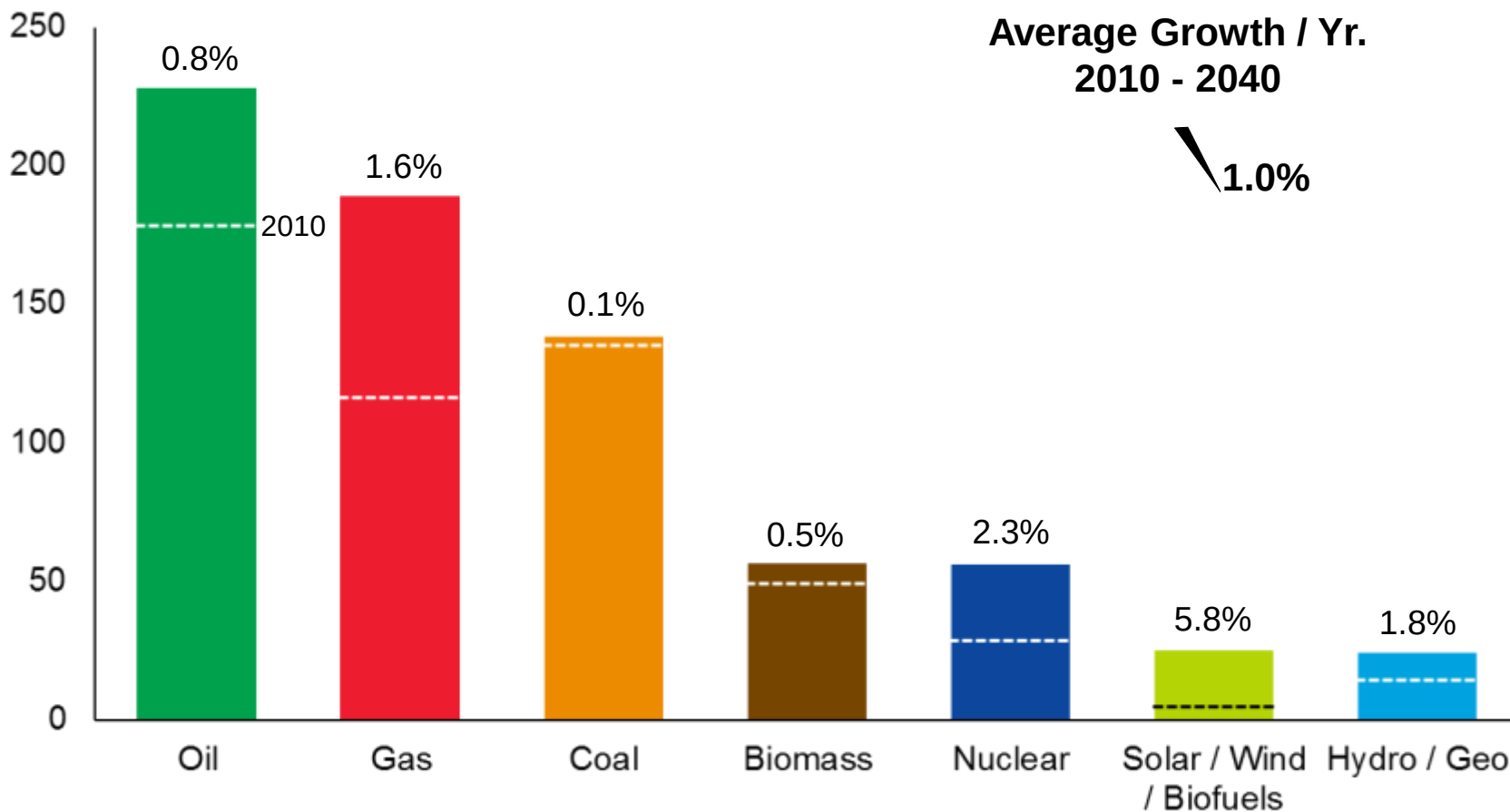
Million



Global Demand

2040 By Fuel

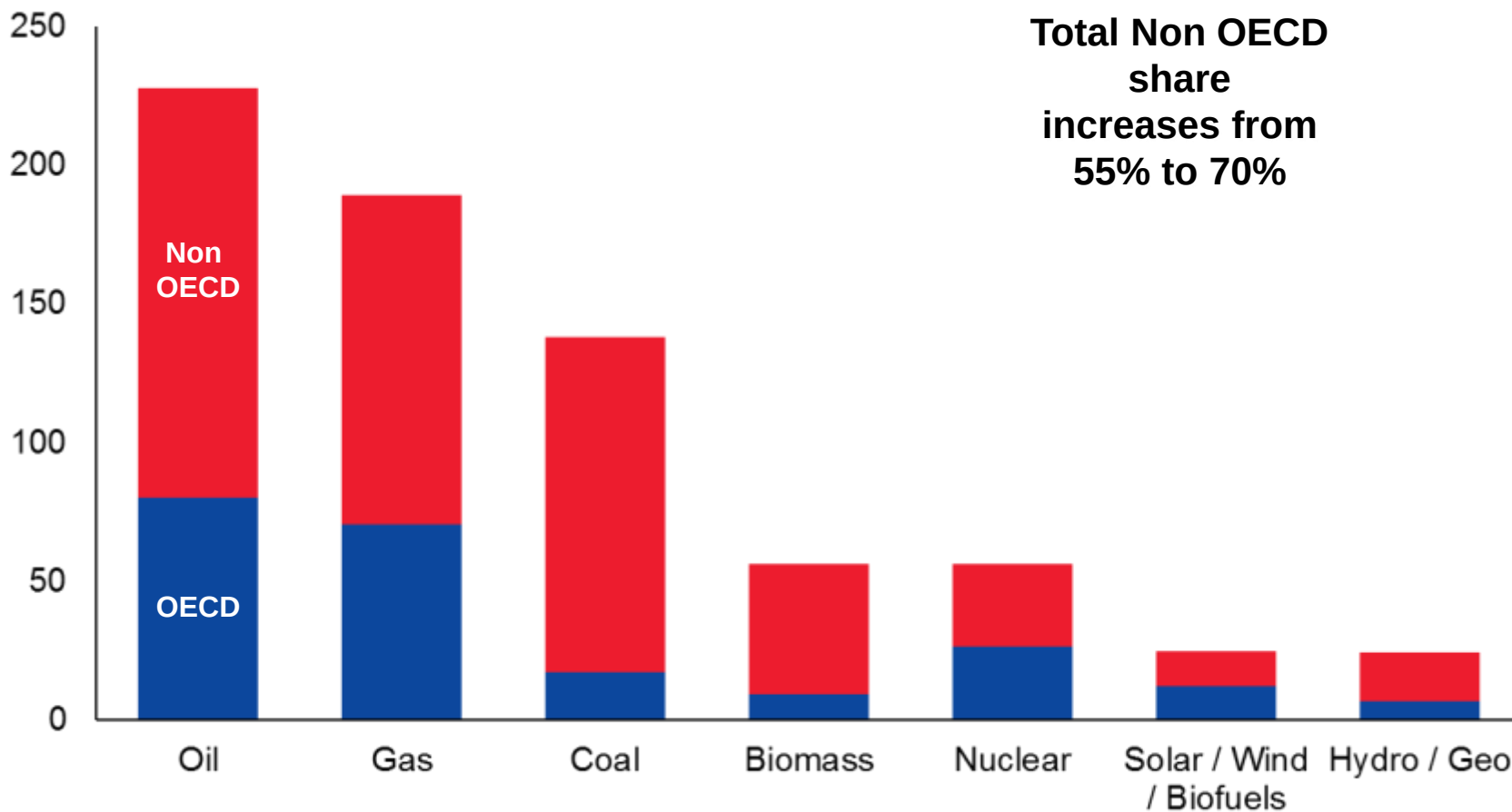
Quadrillion BTUs



Global Demand

2040 By Fuel

Quadrillion BTUs



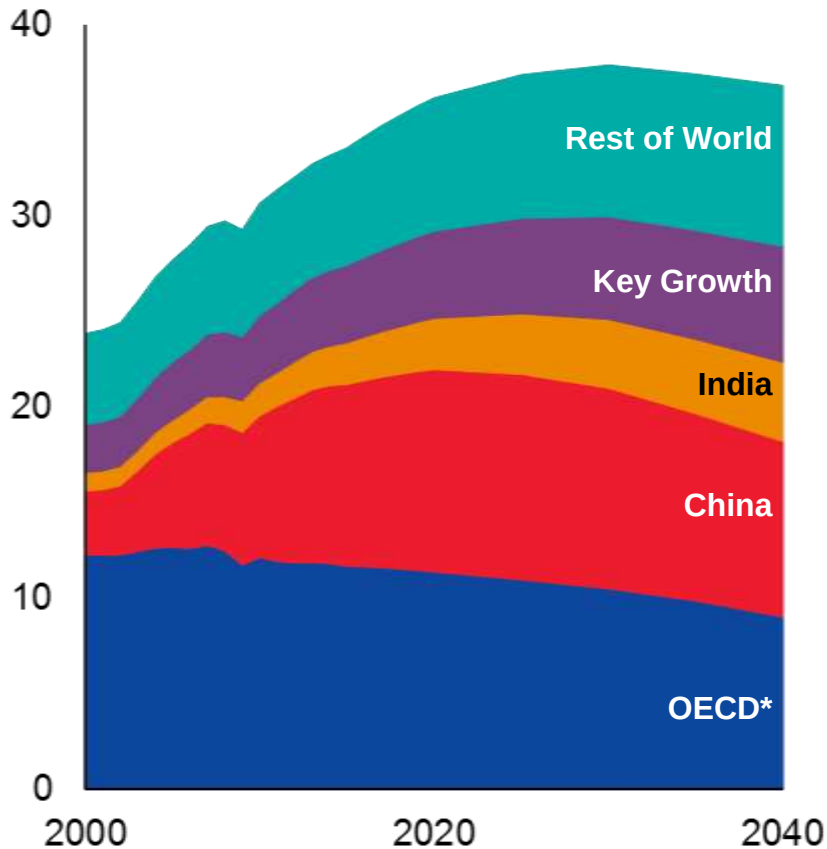
CO₂ Emissions



World Energy-related CO₂ Emissions

CO₂ Emissions by Region

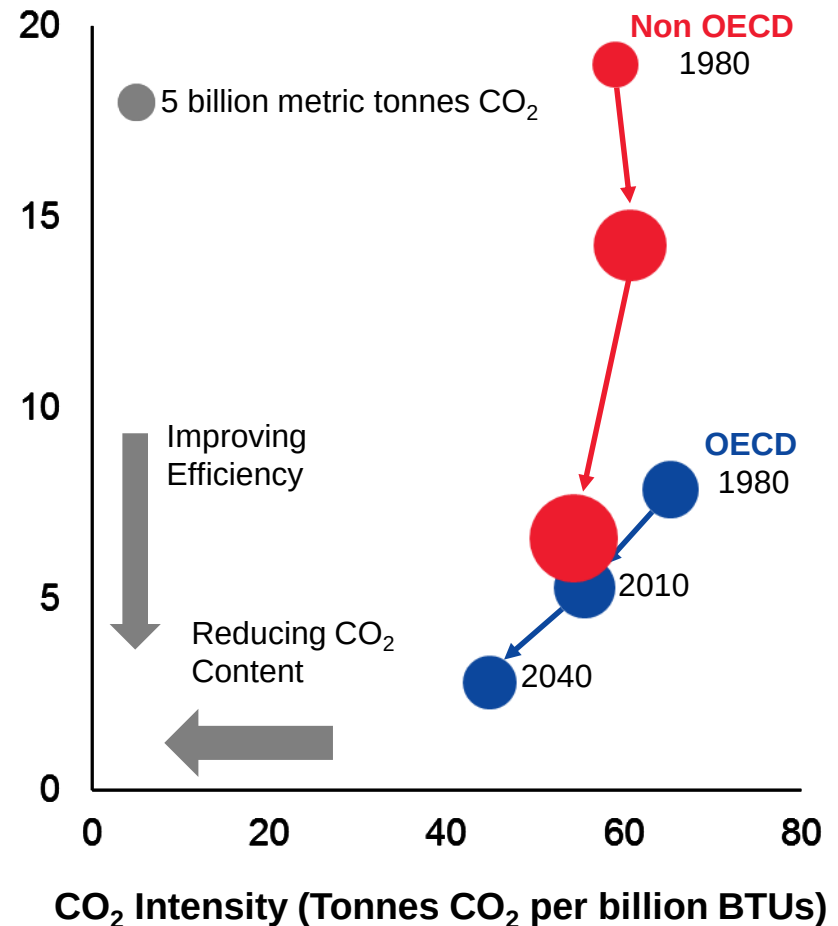
Billion metric tonnes



*Mexico and Turkey included in Key Growth countries

CO₂ Emissions by Region

Thousand BTUs per 2010\$ GDP



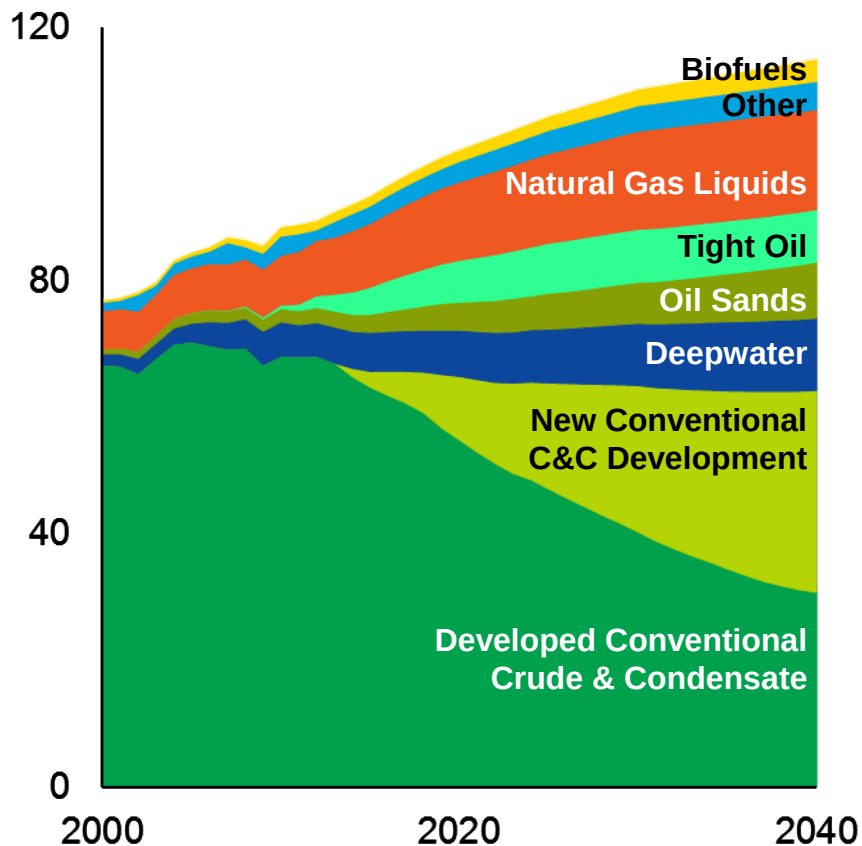
A photograph of an offshore oil rig, specifically a jack-up rig, positioned on a snow-covered mountain. The rig is illuminated with bright lights, and its name "PACIFIC" is visible on the base. The surrounding landscape is a rugged, snow-covered mountain with sparse evergreen trees. The sky is a mix of blue and orange, suggesting a sunset or sunrise. The word "Supply" is overlaid in white text on the left side of the image.

Supply

Liquids Supply

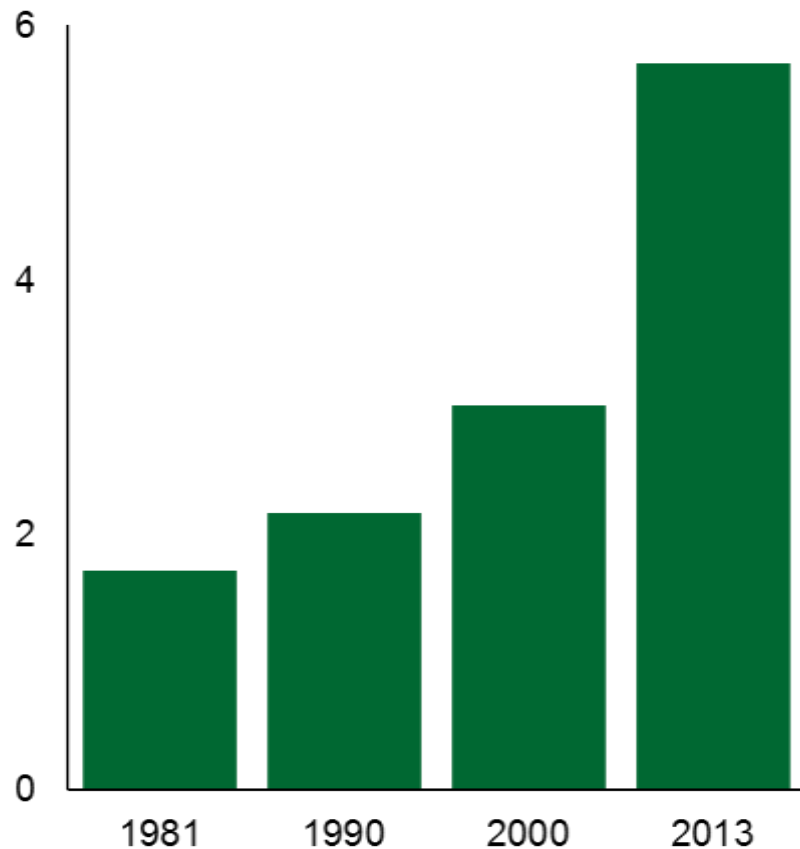
World Supply by Type

MBDOE



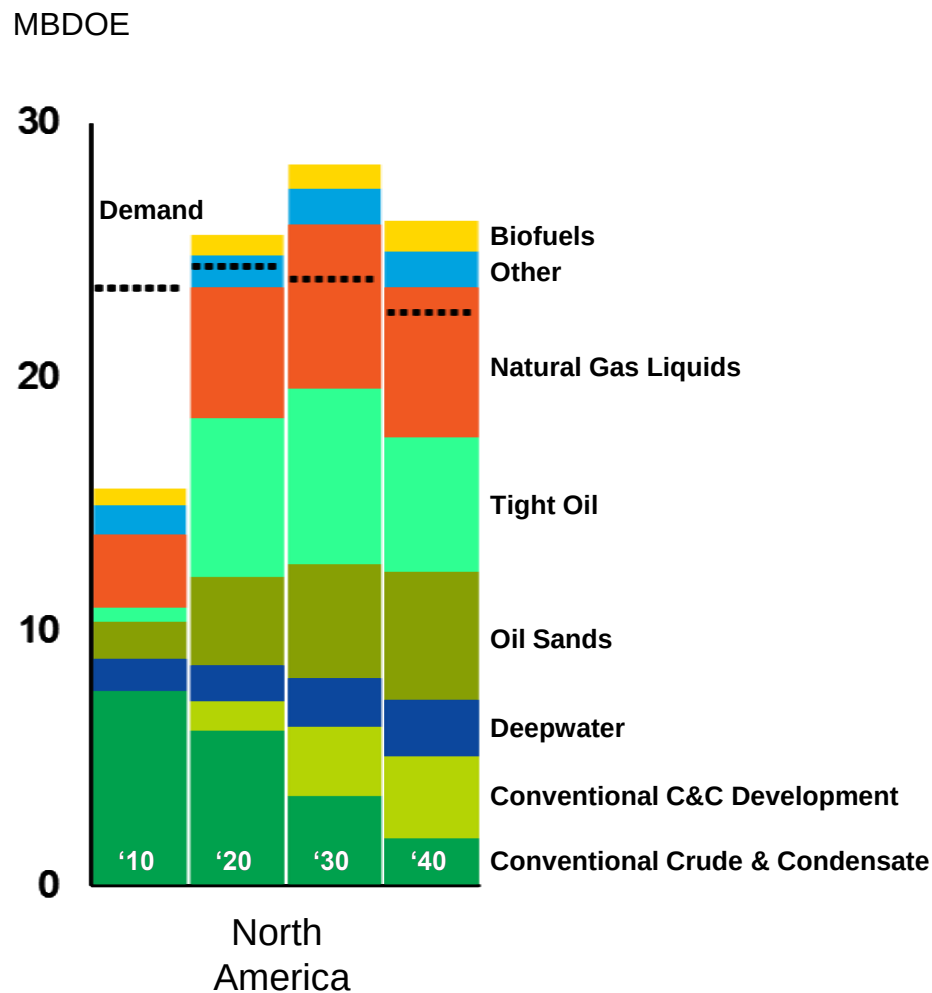
Crude & Condensate Resource Estimates

Trillion Barrels



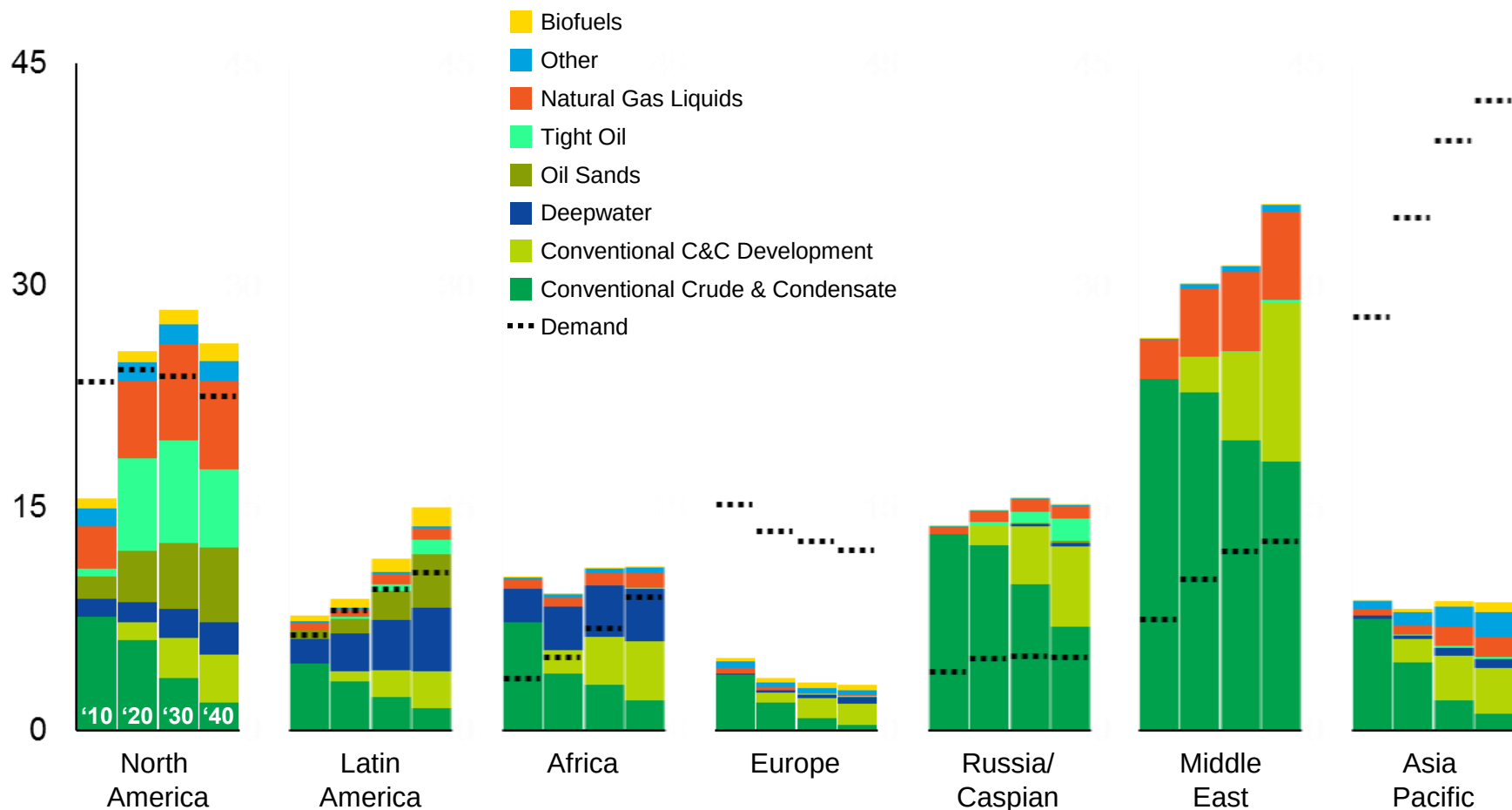
Source: USGS and IEA historical estimates

Liquids Trade Balance by Region



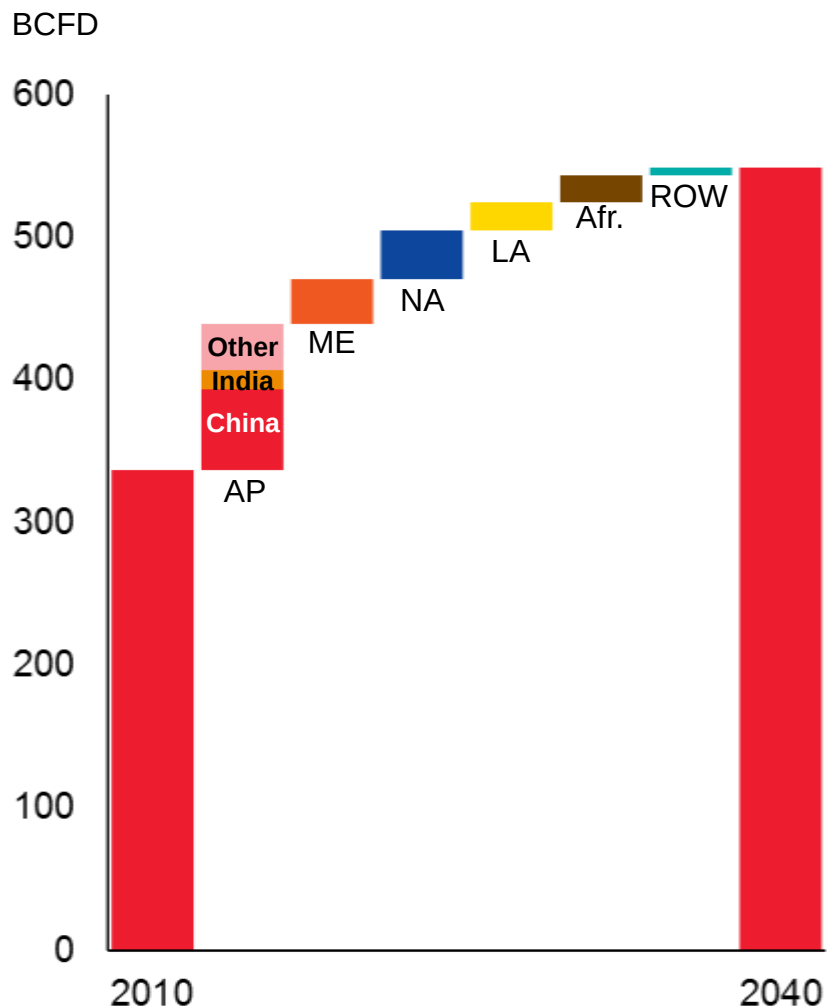
Liquids Trade Balance by Region

MBDOE

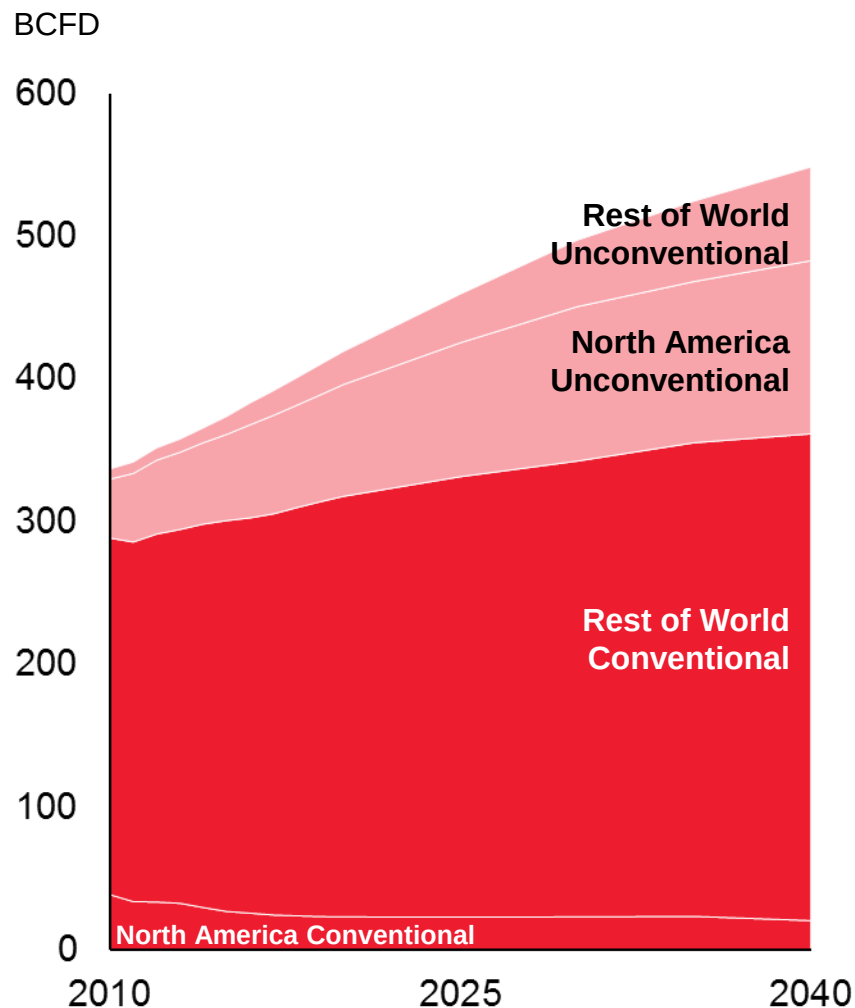


Natural Gas Supply and Demand Shifts

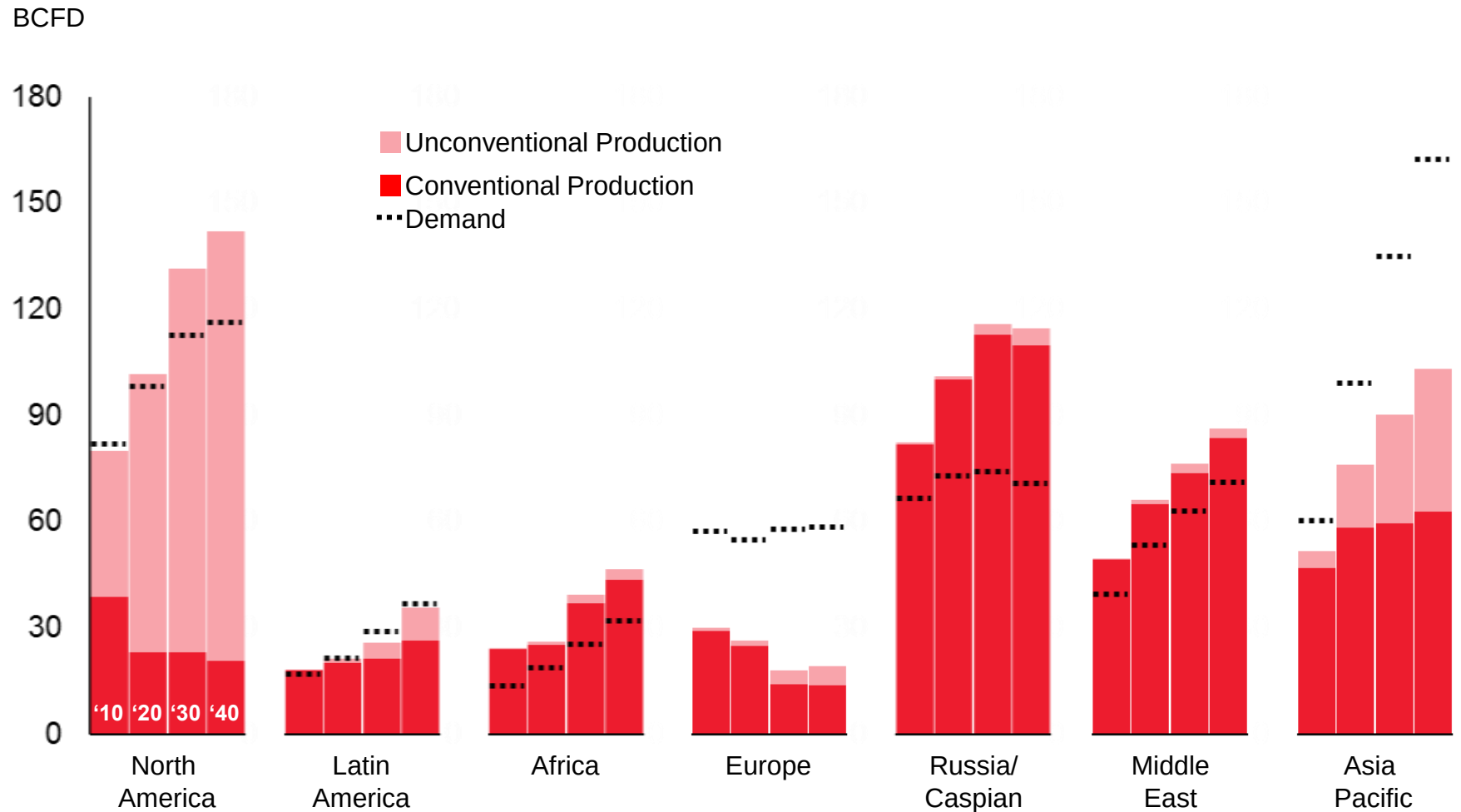
Global Gas Demand



Global Gas Supply



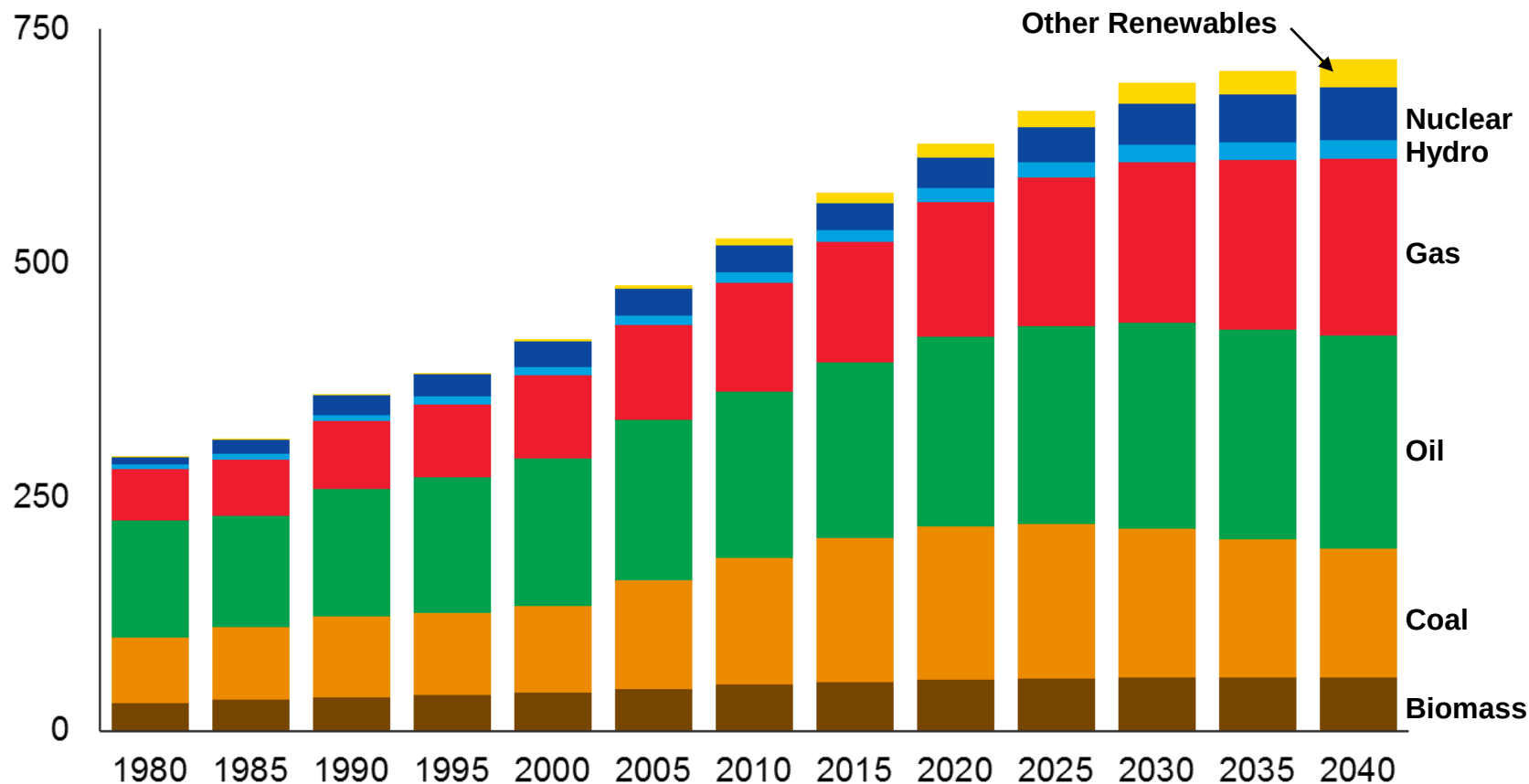
Gas Trade Balance by Region



Energy Use Evolves Over Time

Demand by Fuel

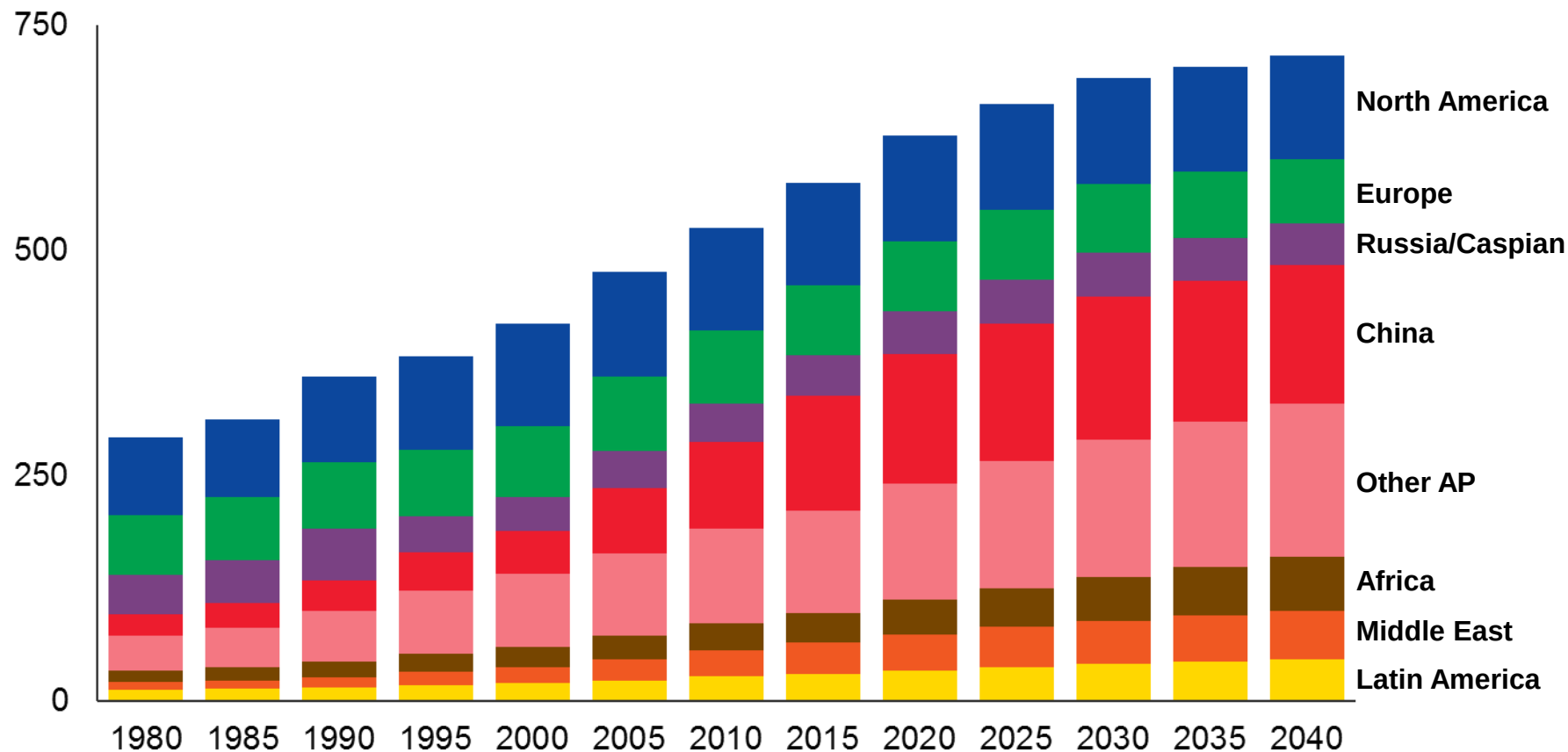
Quadrillion BTUs



Regional Energy Trends Evolve

Demand by Region

Quadrillion BTUs



The Outlook for Energy: A View to 2040

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