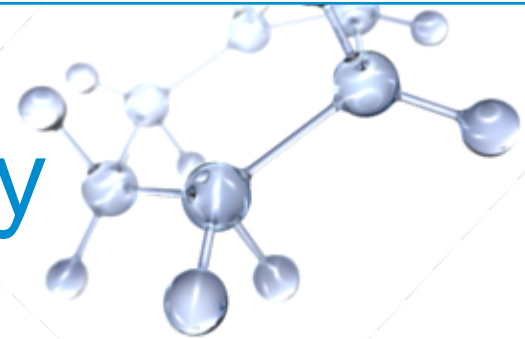


ExxonMobil

Taking on the world's toughest energy challenges.™



The Outlook for Energy

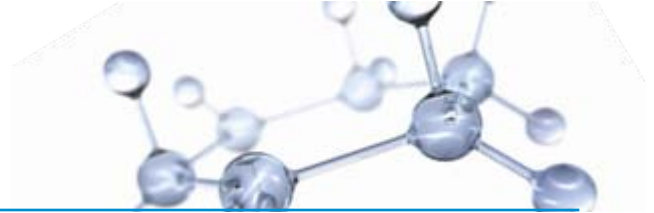
a view to 2030

US EIA and John Hopkins University 2010 Energy Conference

Tom Eizember
Corporate Strategic Planning
6 April 2010

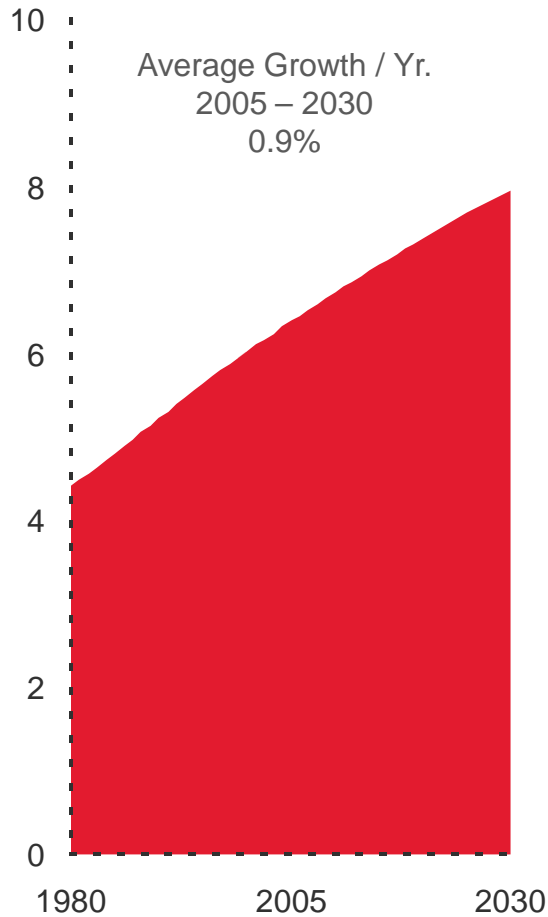
This presentation includes forward-looking statements. Actual future conditions (including economic conditions, energy demand, and energy supply) could differ materially due to changes in technology, the development of new supply sources, political events, demographic changes, and other factors discussed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

Global Economics and Energy



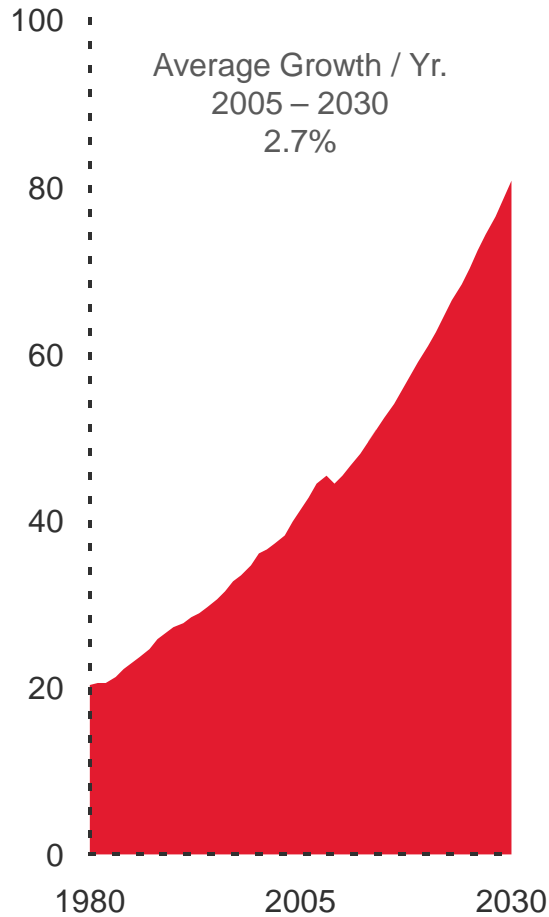
Population

Billion



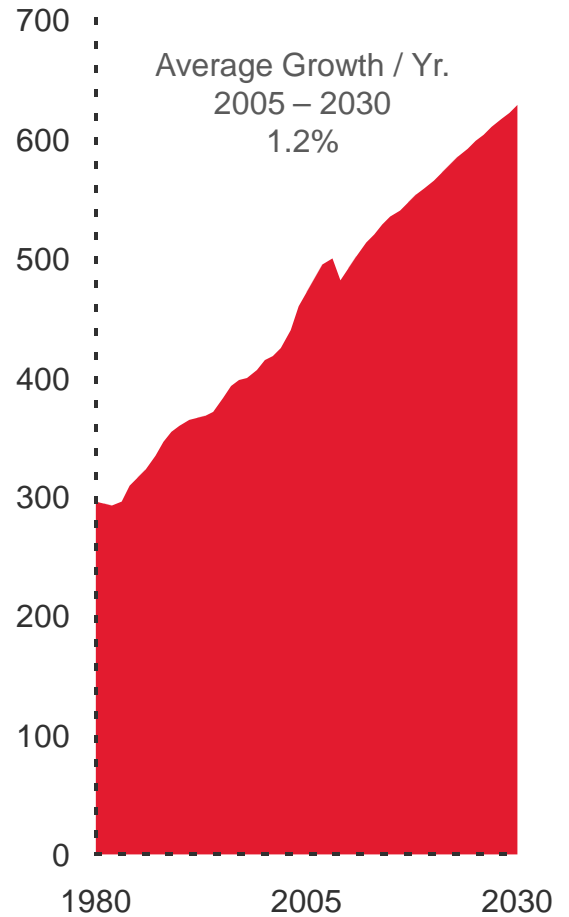
GDP

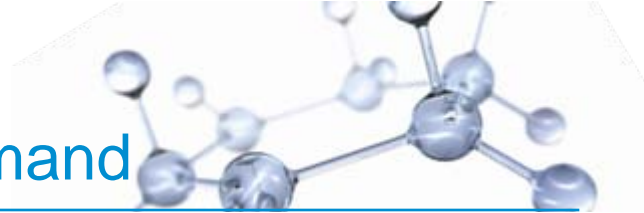
Trillion 2005\$



Energy Demand

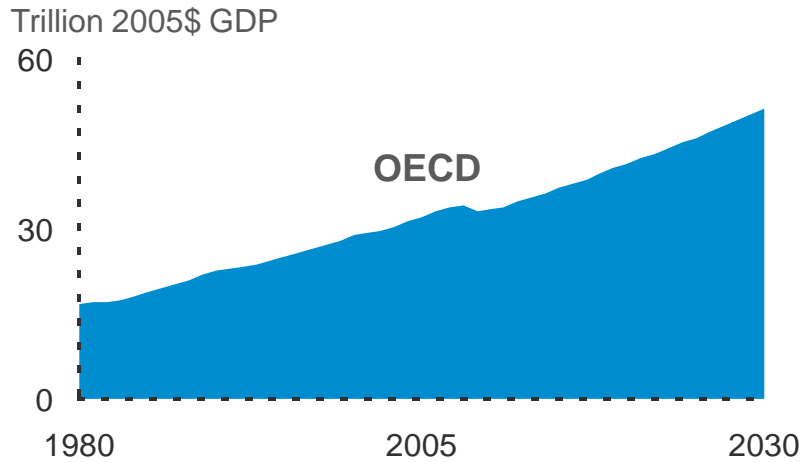
Quadrillion BTUs



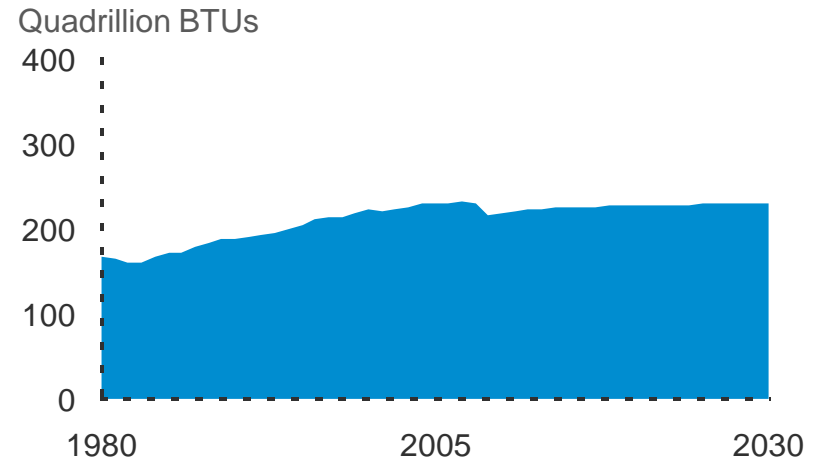


Economic Growth Drives Energy Demand

GDP

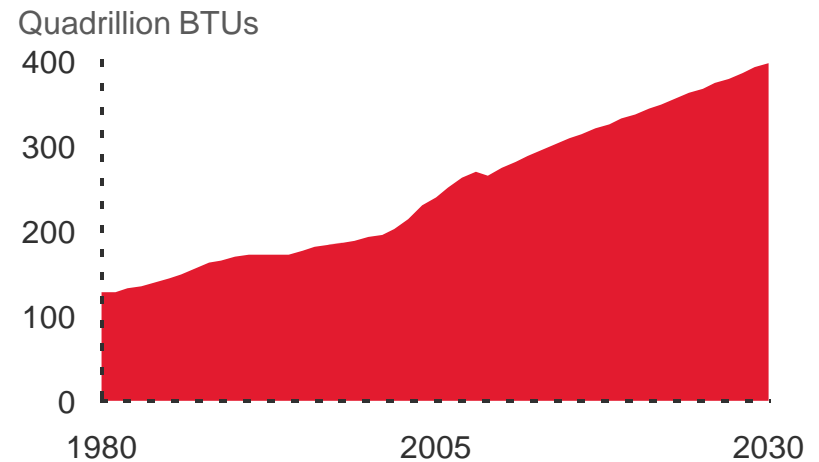
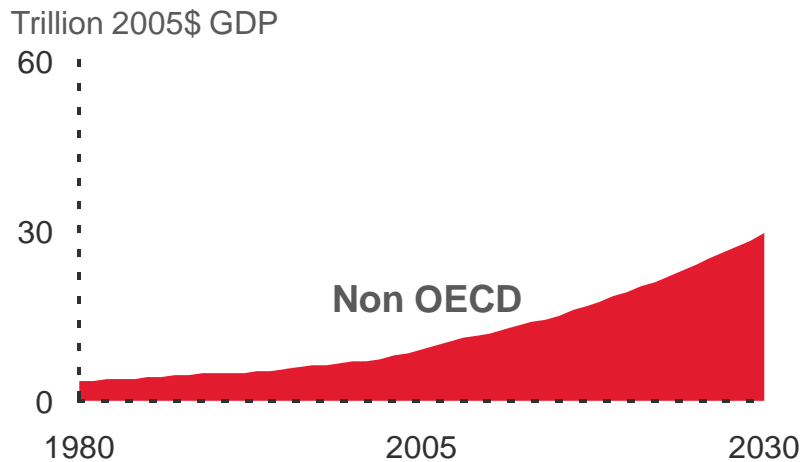


Demand

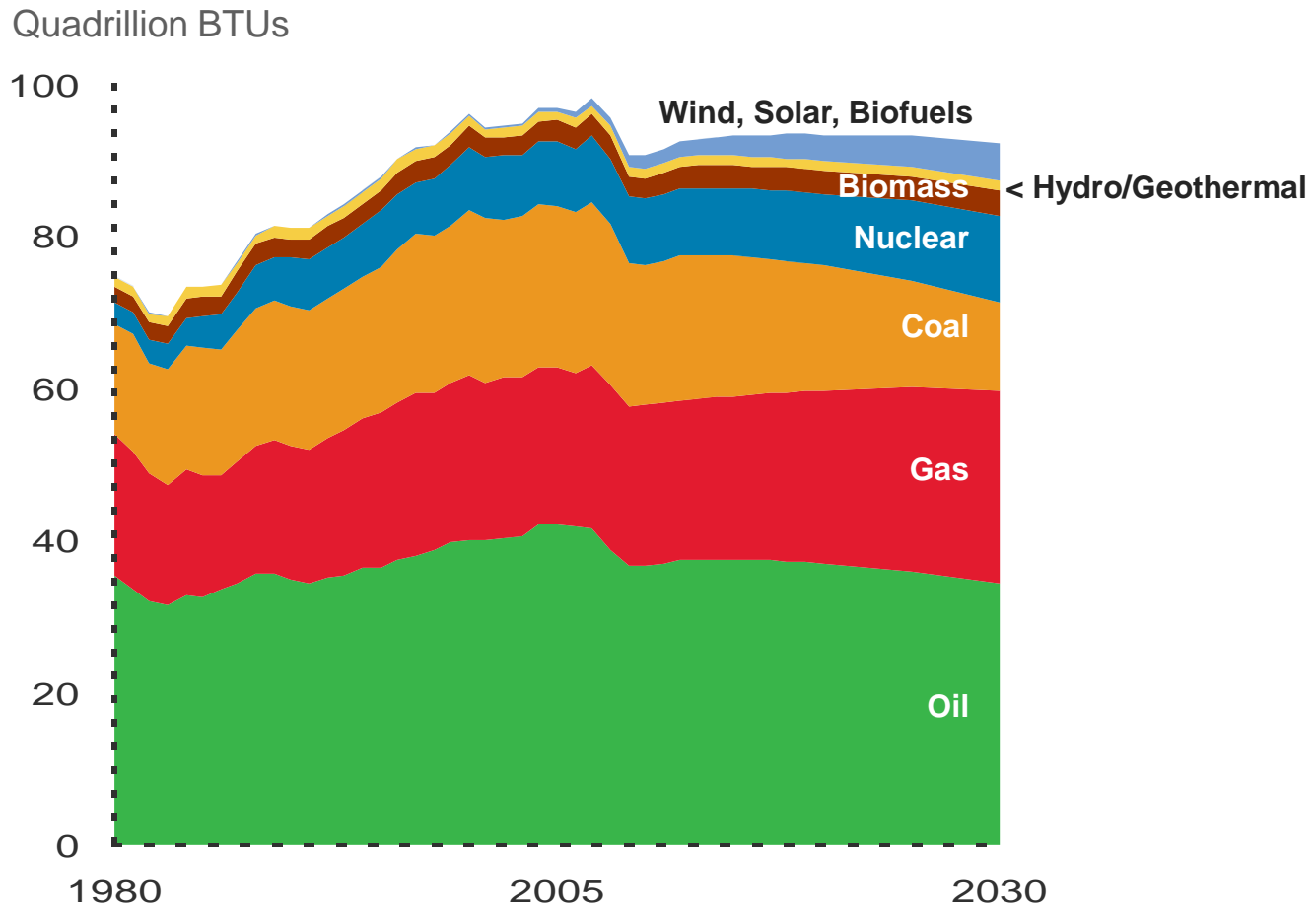
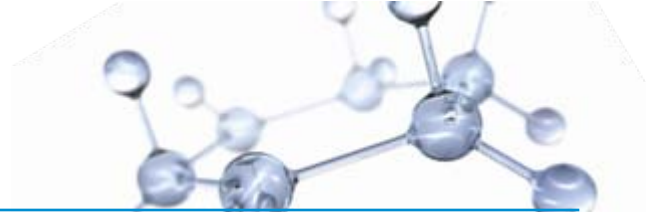


OECD

Non OECD



US Primary Energy Supply

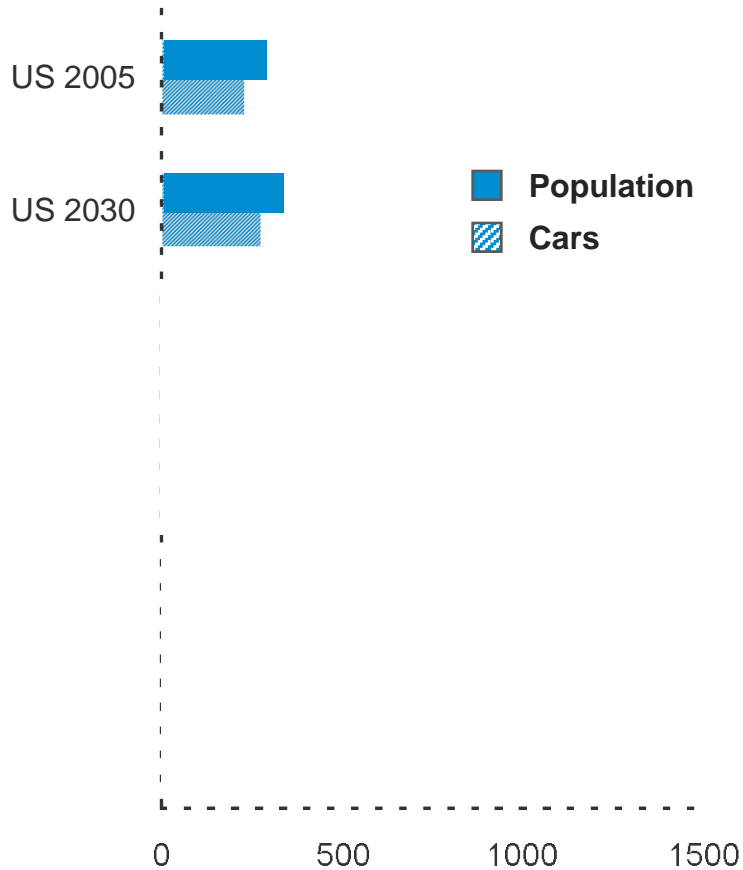


Personal Vehicle Fleet



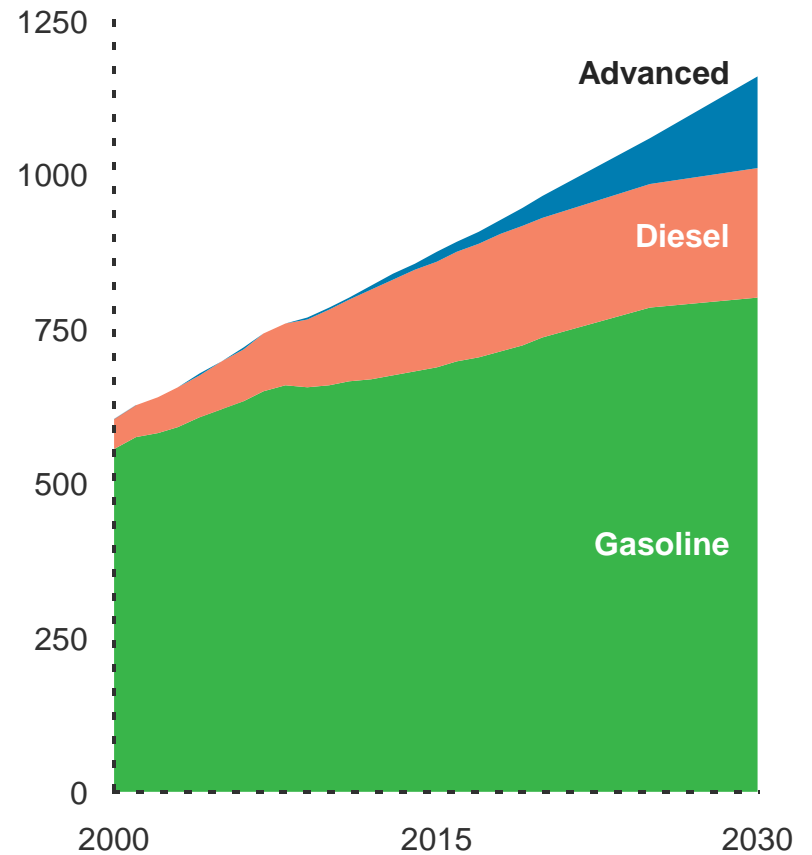
Vehicle Penetration

Cars and Population (millions)

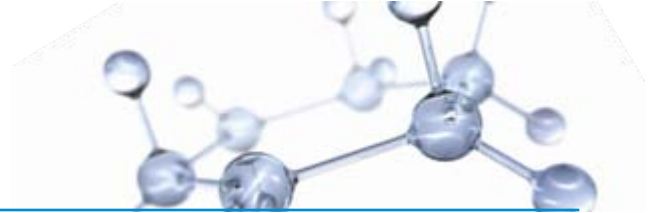


Fleet by Car Type

Million Cars

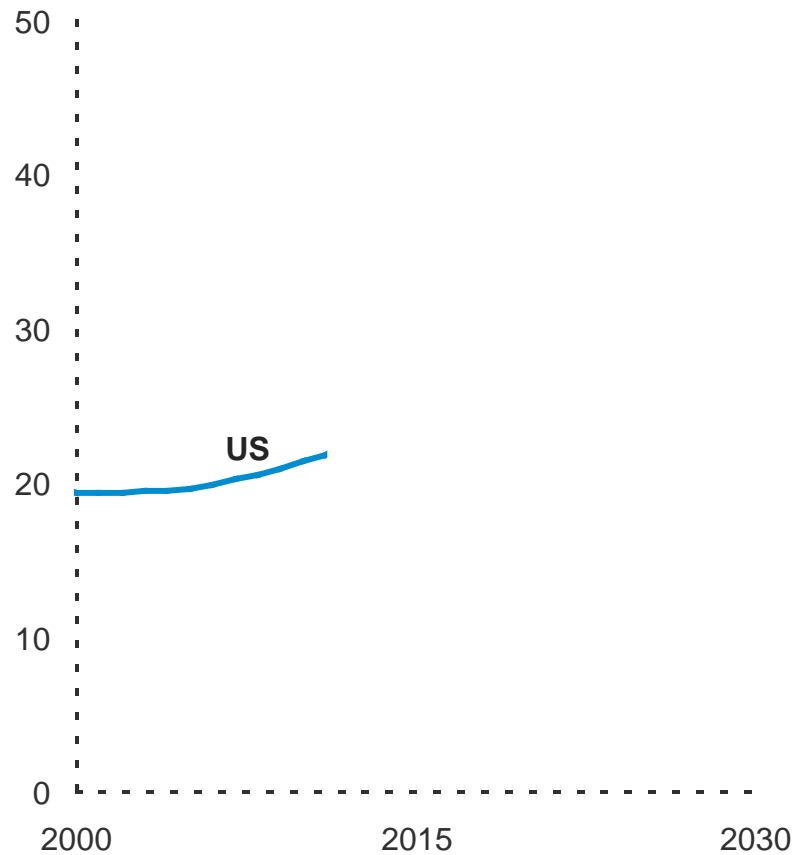


Global Transportation Demand



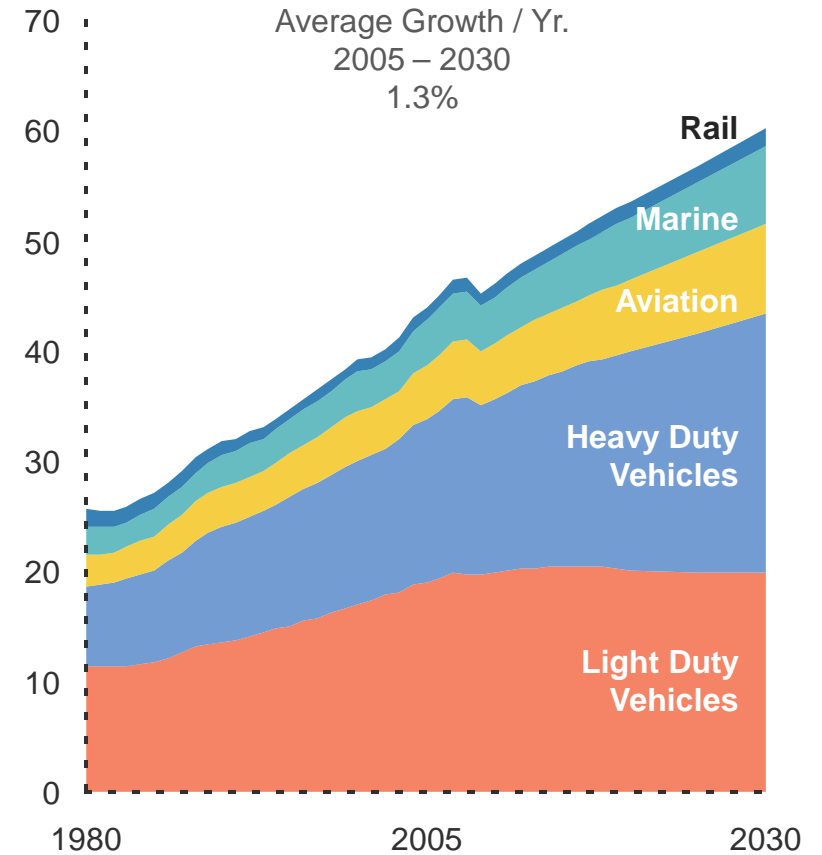
Average New Car

MPG

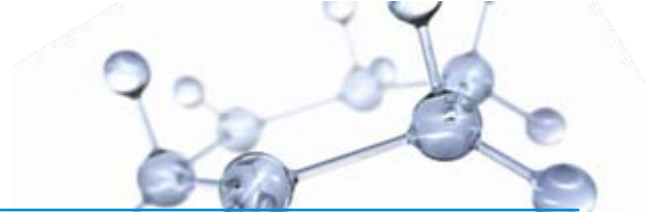


By Sector

MBDOE

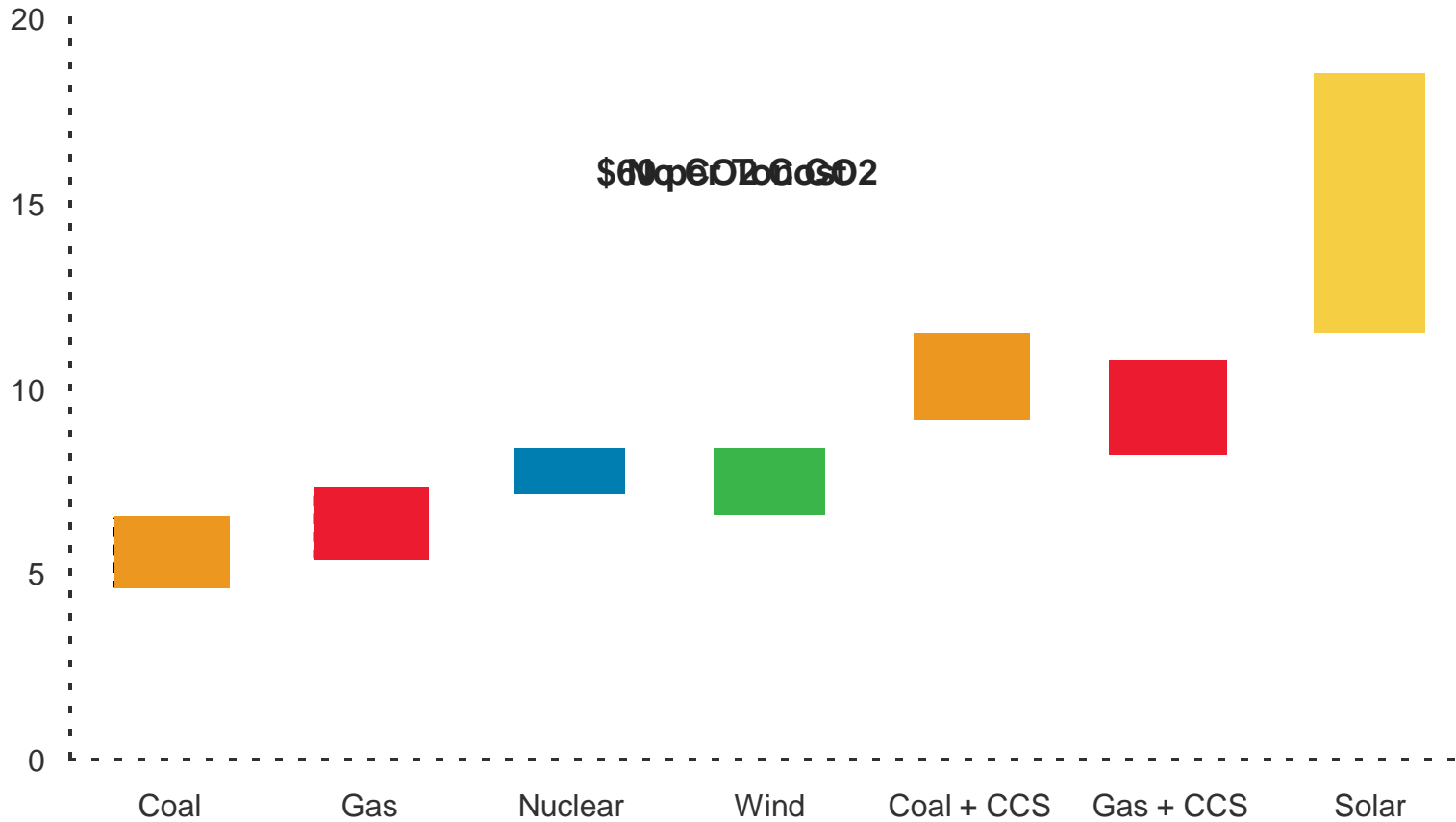


Electricity Generation Cost

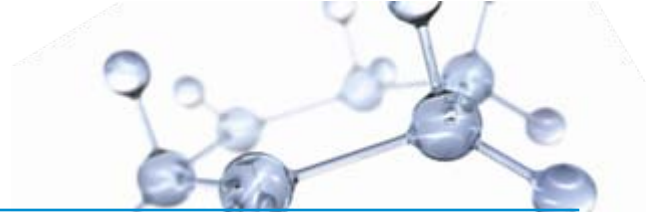


US Baseload, Startup 2025

2009 Cents/kWhr

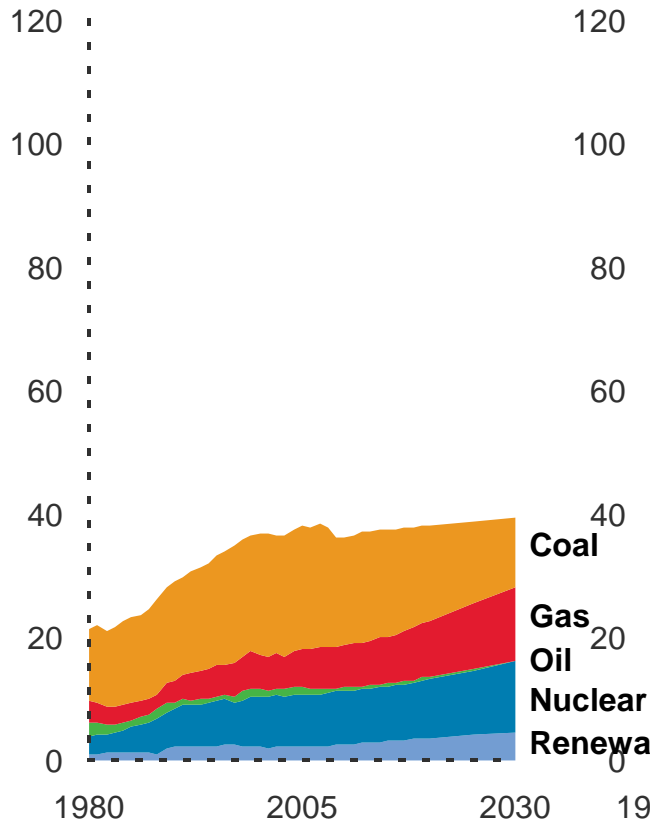


Power Generation Fuel Demand



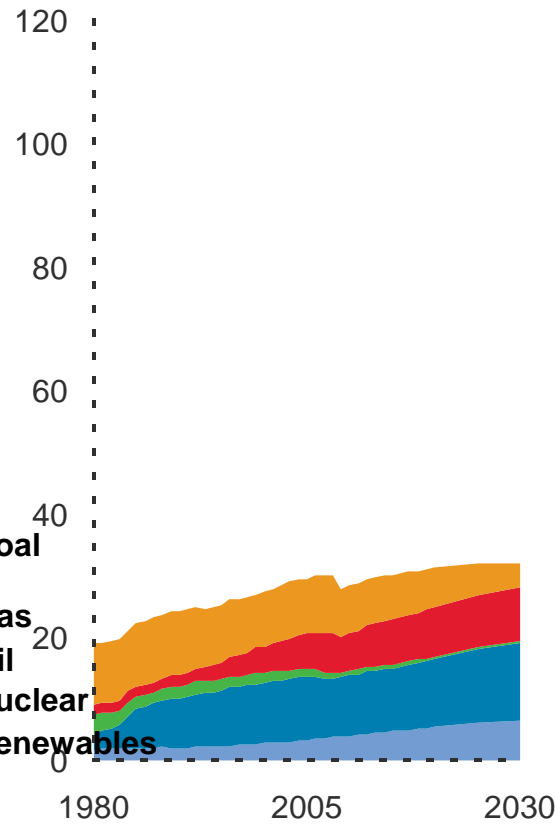
United States

Quadrillion BTUs



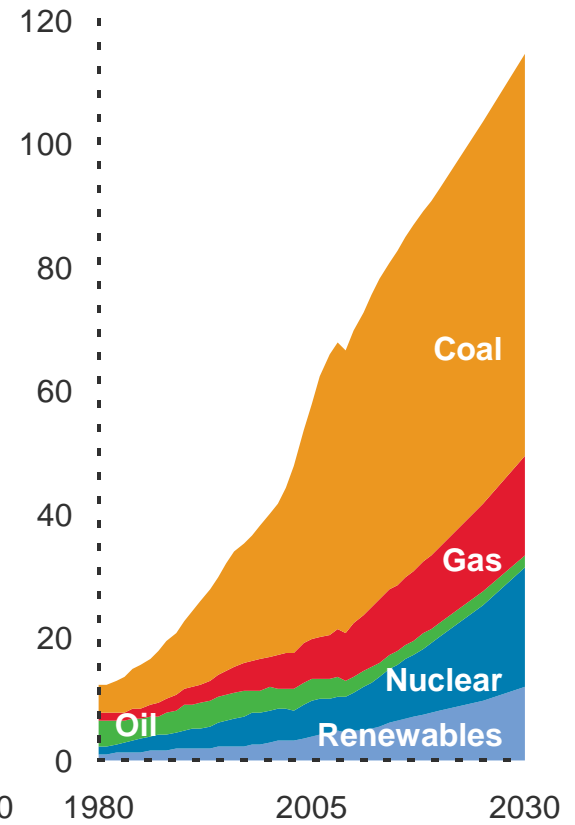
Europe OECD

Quadrillion BTUs



Asia Pacific

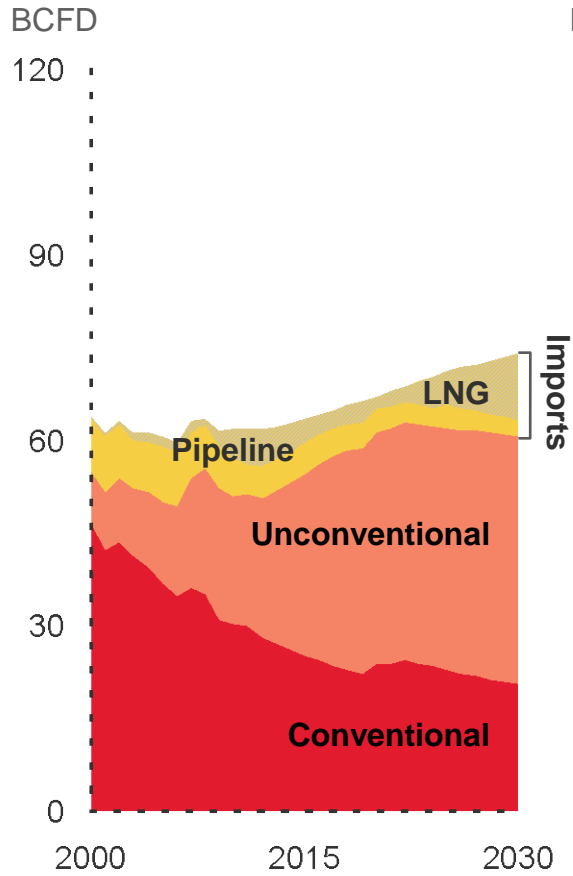
Quadrillion BTUs



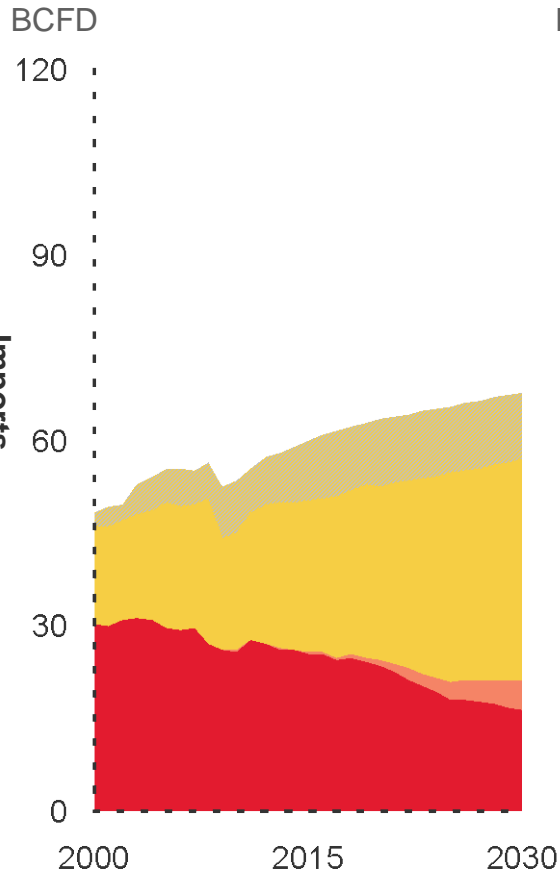
Gas Supply and Demand Balance



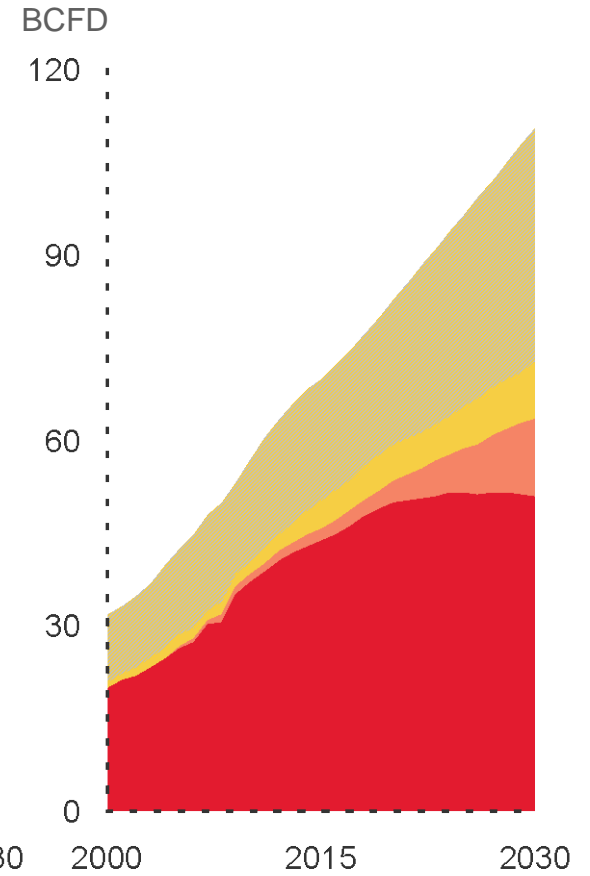
United States



Europe

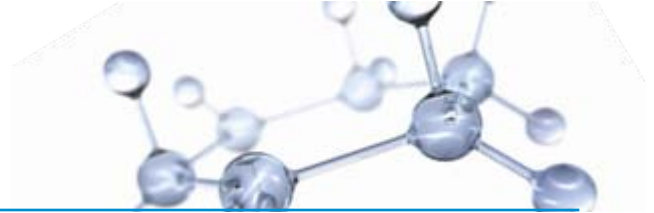


Asia Pacific



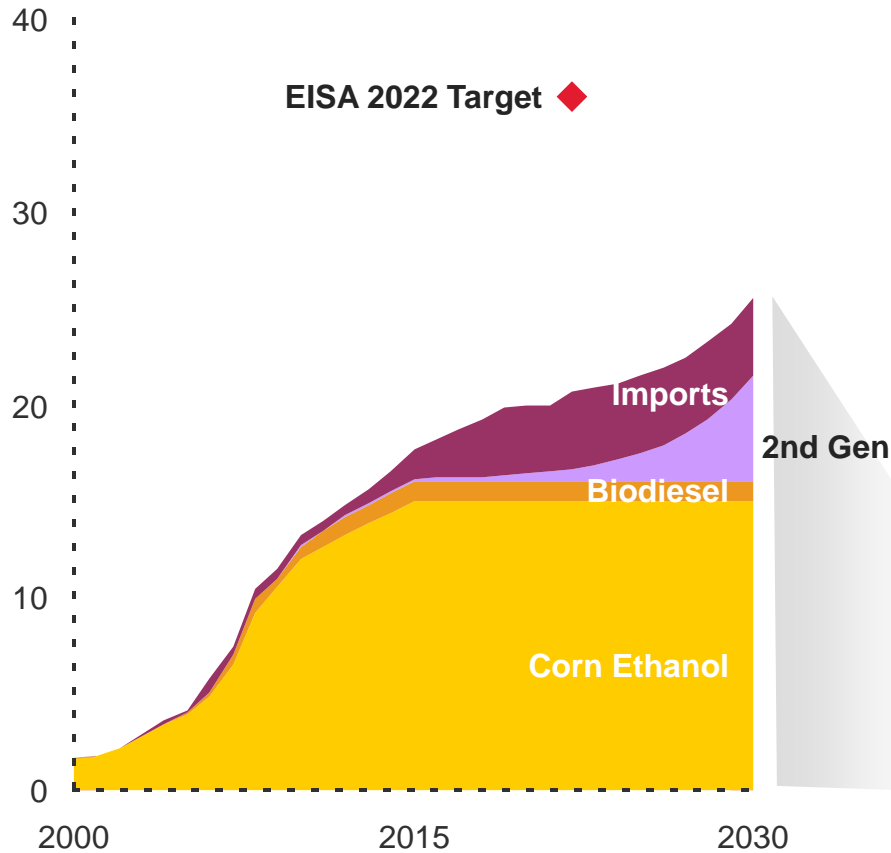
LNG: Liquefied Natural Gas

Biofuels



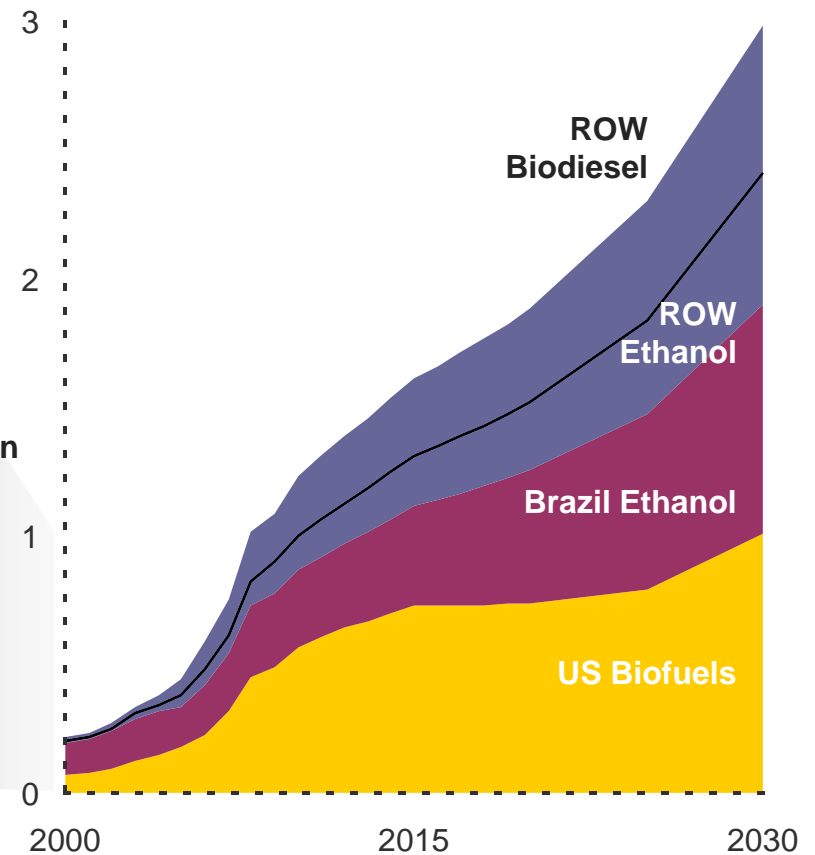
US Supply

Billion Gallons



Global Supply

MBDOE

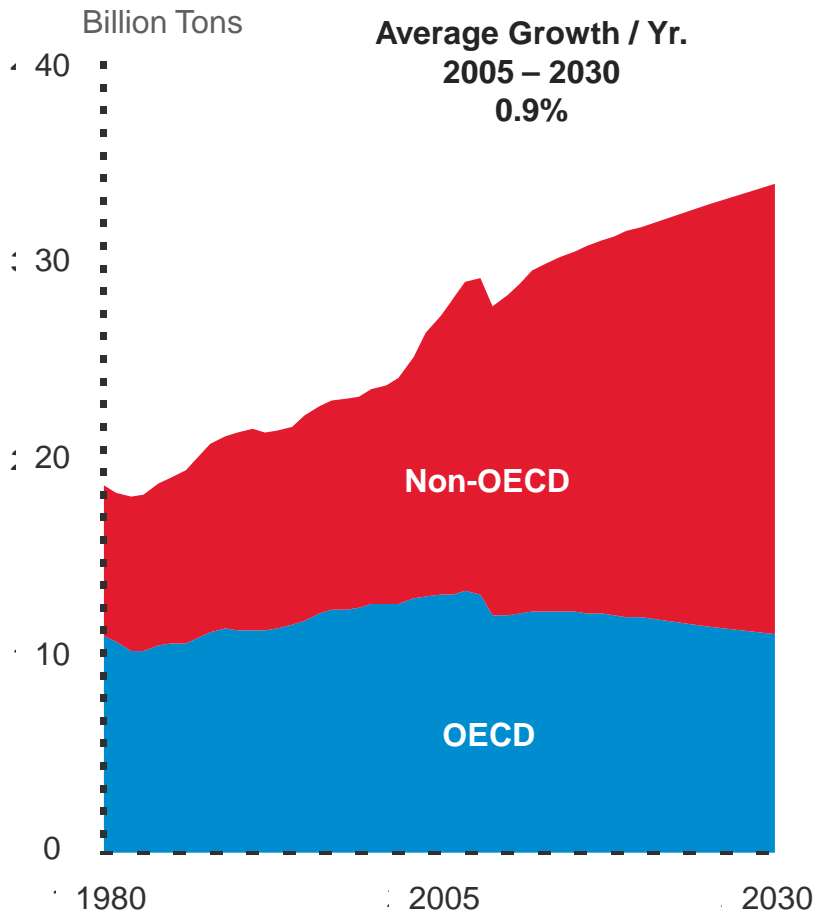


*EISA: Energy Independence and Security Act

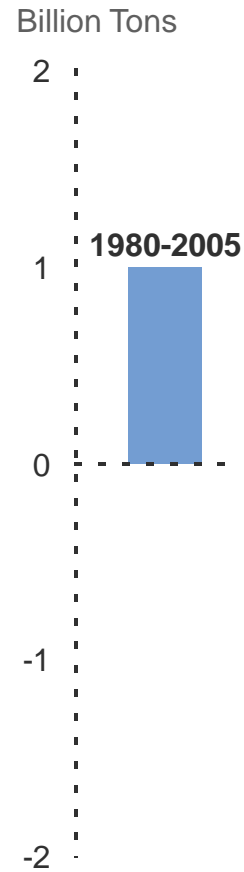
CO₂ Emissions



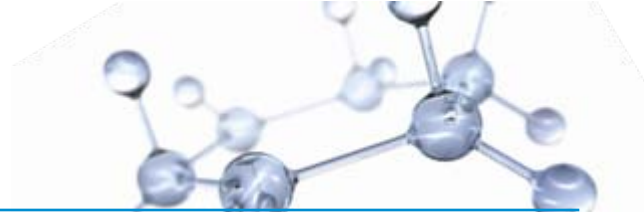
Global CO₂ Emissions



Change in US CO₂ Emissions



Integrated Energy Solutions



Now

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

Mitigate Emissions



Increase Efficiency

2030
on people

Technology



- OECD leads economic growth
- living standards improve
- needs up one-third
- environmental goals
- advances in technology

Expand Supply



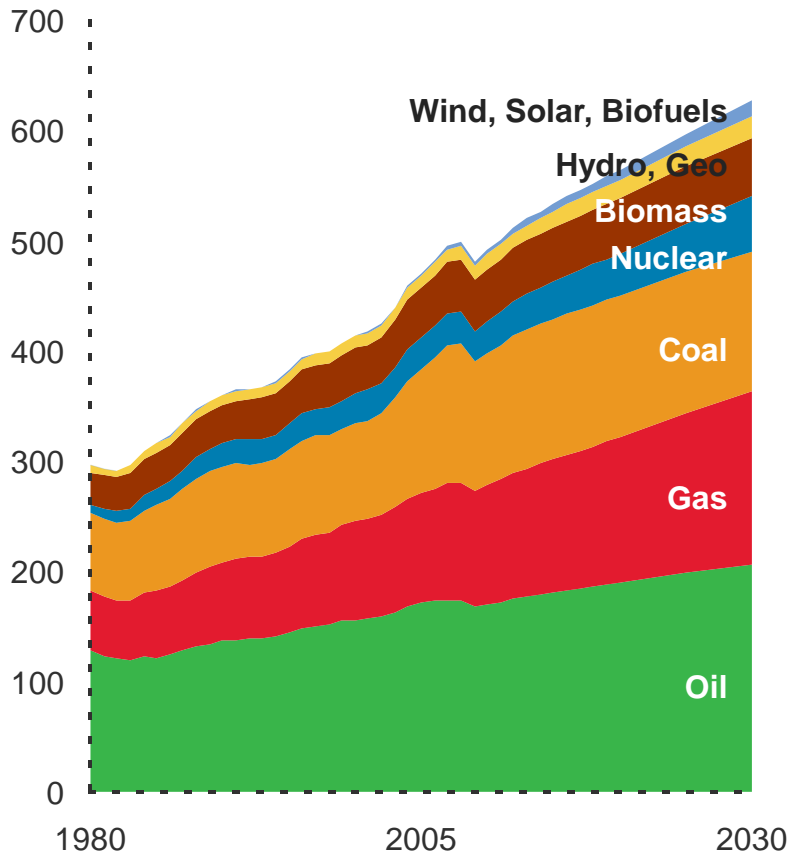
ExxonMobil™

Primary Energy Supply



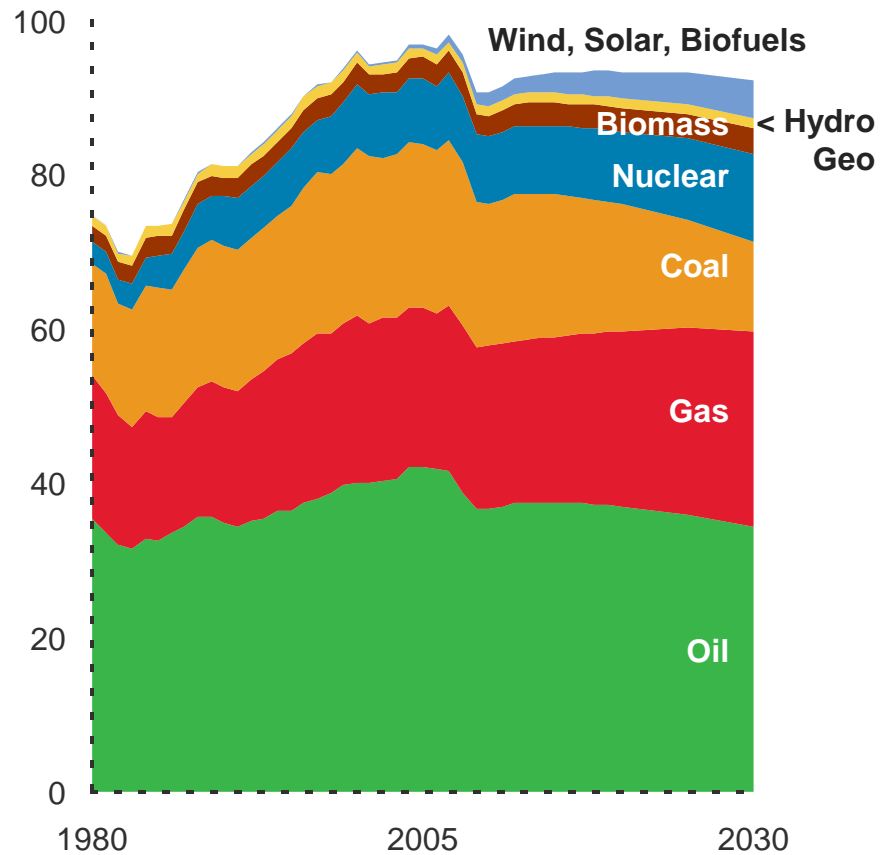
Global

Quadrillion BTUs



US

Quadrillion BTUs

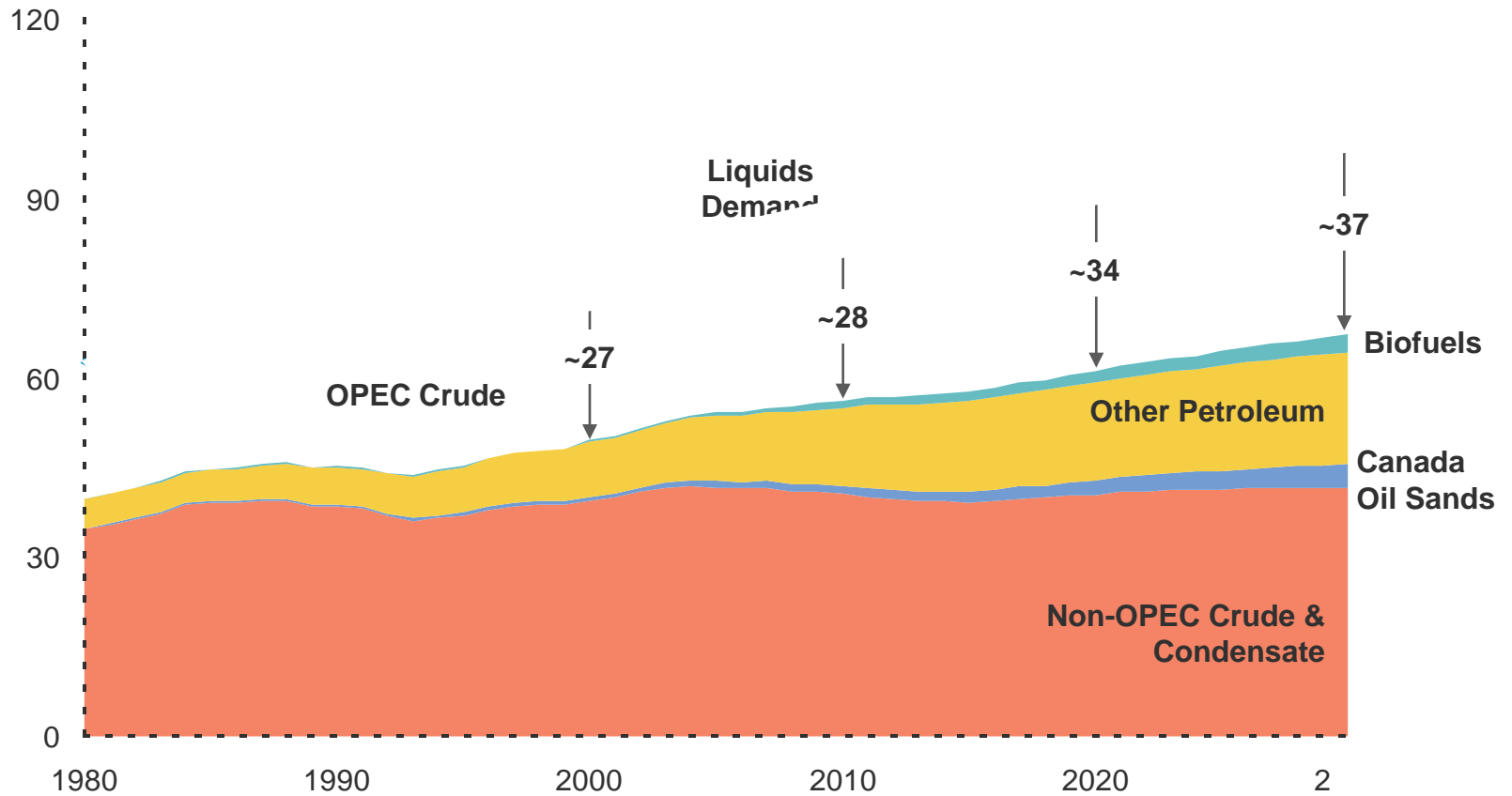


Global Liquids Supply



Global Liquids Supply and Demand

MBDOE

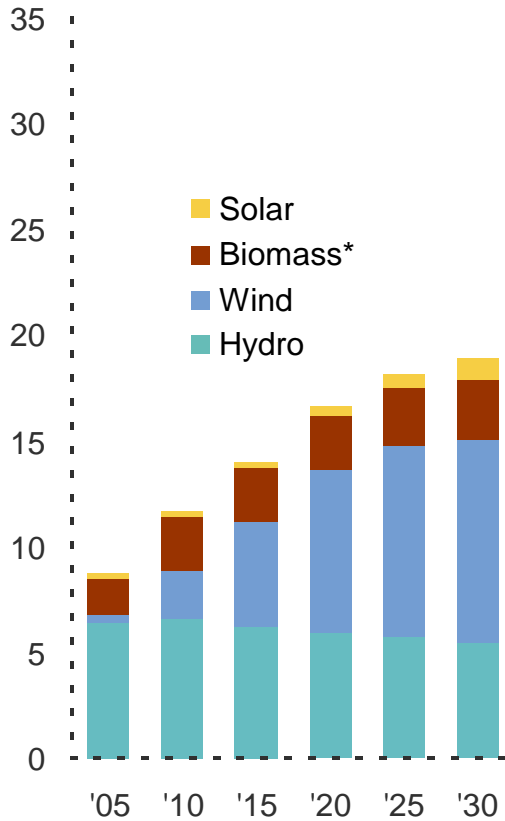


Renewables by Region



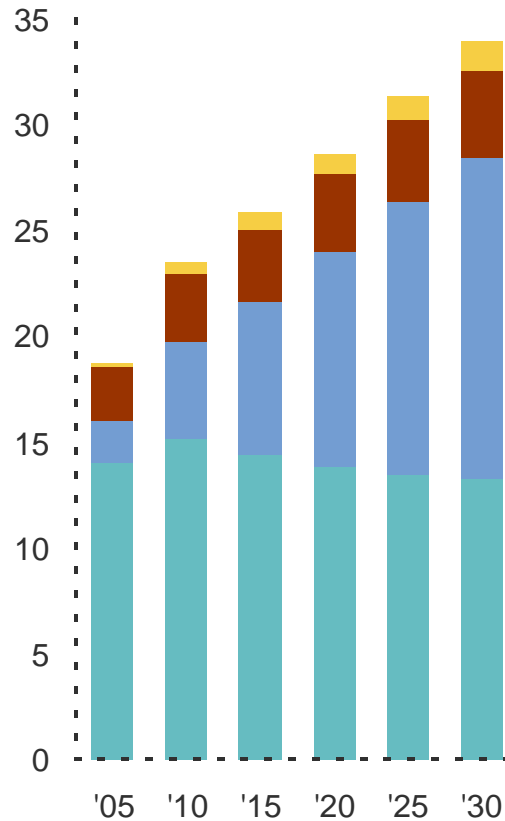
United States

Percent of TWhr



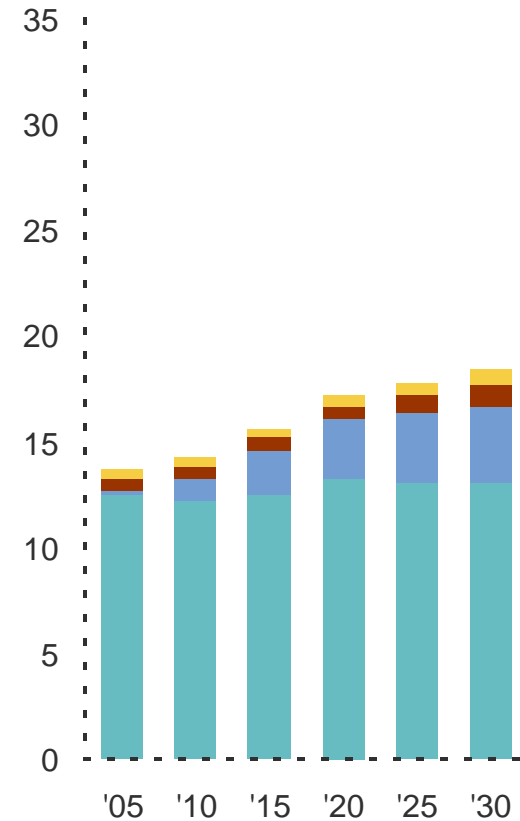
Europe OECD

Percent of TWhr



Asia Pacific

Percent of TWhr



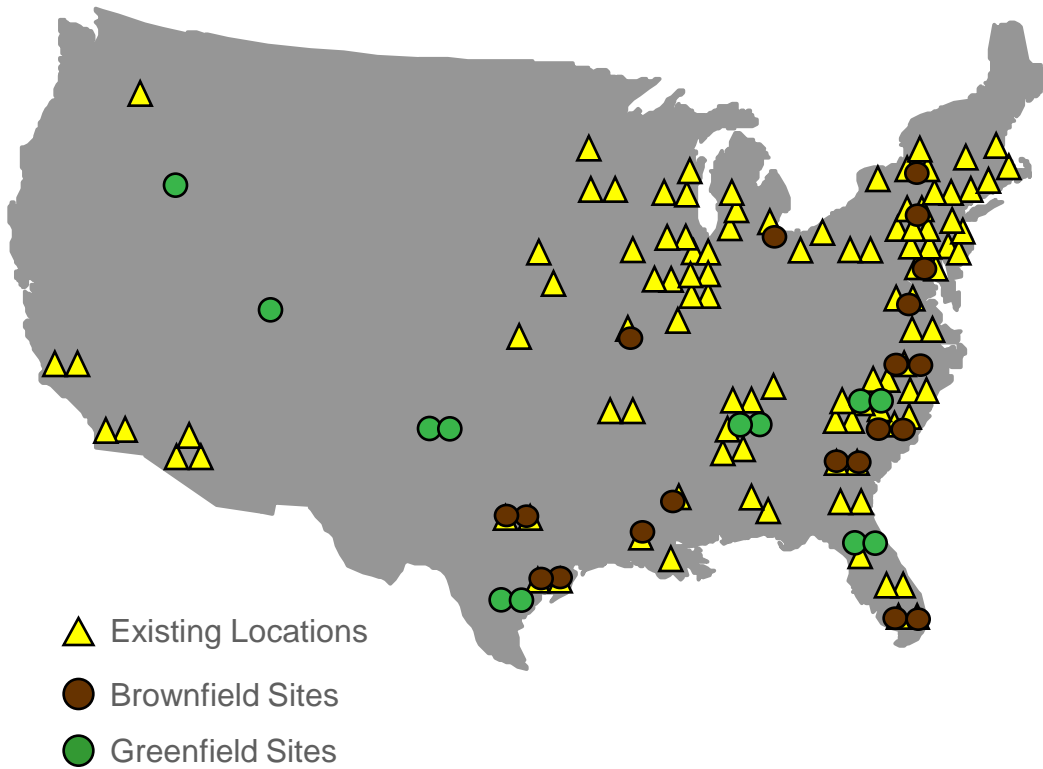
*Biomass includes Municipal Solid Waste

Nuclear



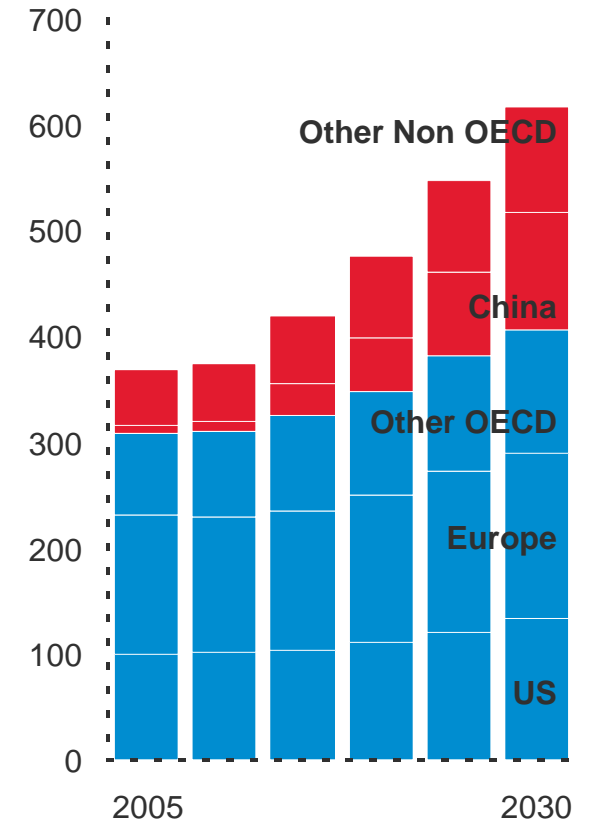
US Nuclear Reactors

Existing Locations



Global Capacity

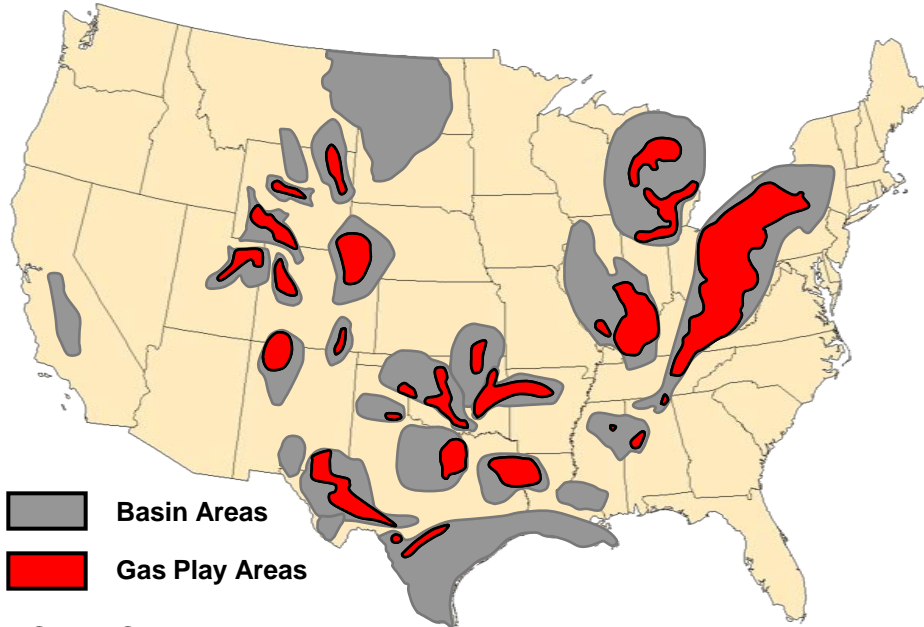
GW



U.S. Natural Gas Supply



Shale/Tight Gas and CBM Basins



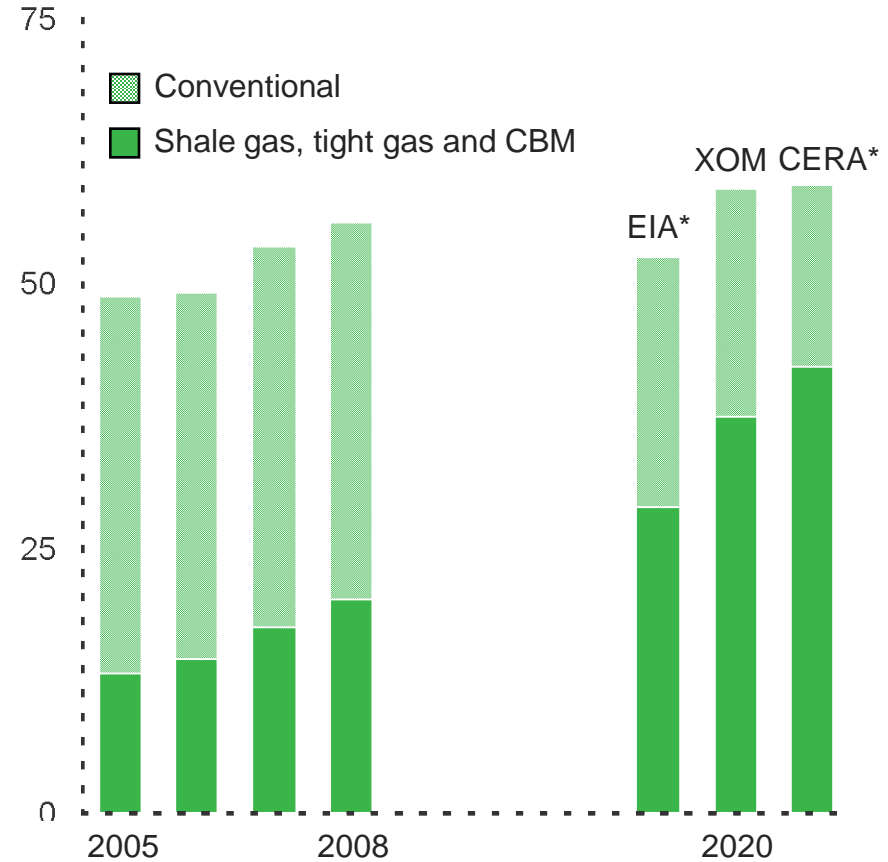
- Basin Areas
- Gas Play Areas

CBM: Coal Bed Methane

**U.S. Natural Gas Resource Base:
Likely covers about a century of
demand at current rates**

Production Outlook

Billion Cubic Feet per Day



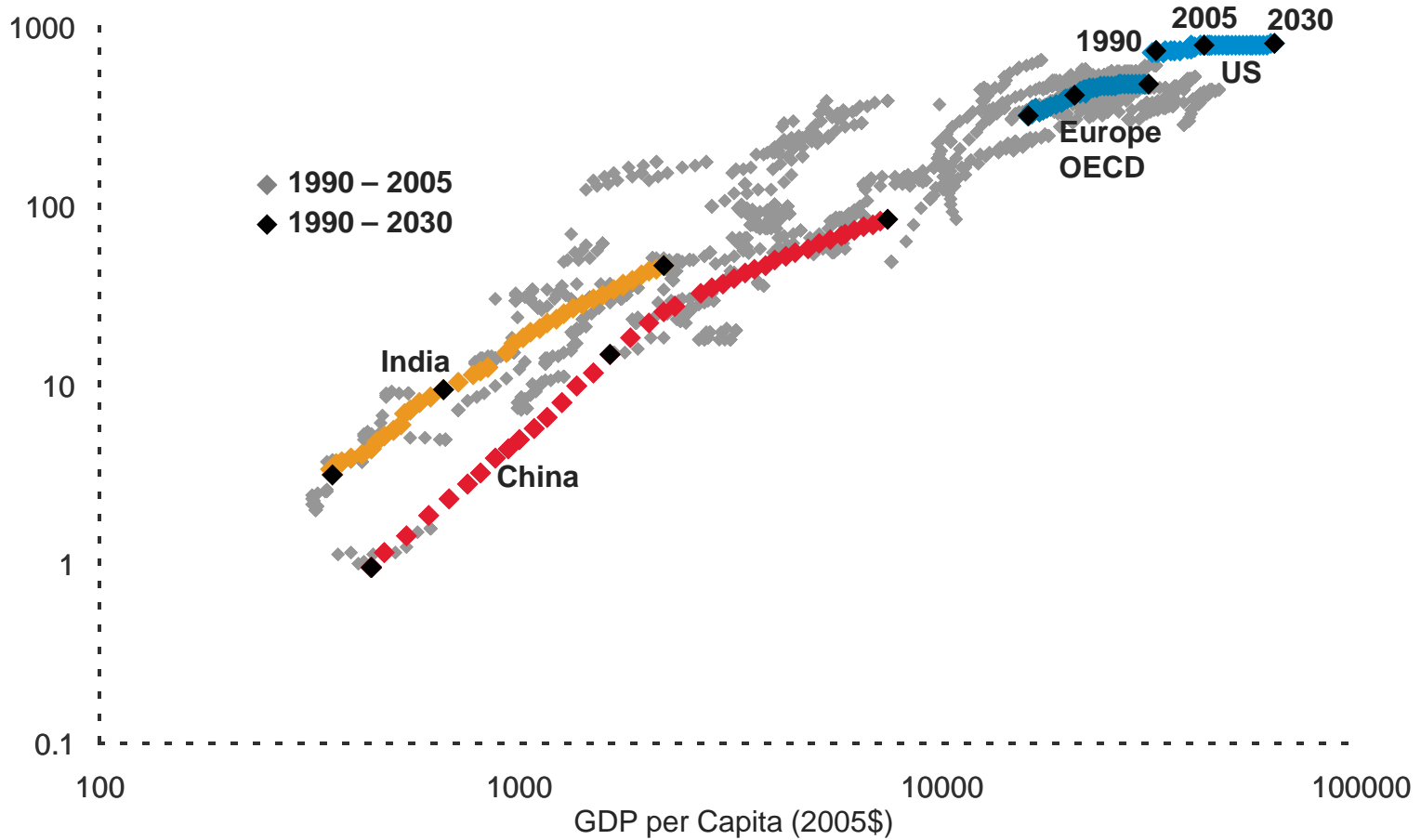
* EIA and CERA Outlooks do not include Alaska pipeline

Light Duty Vehicles vs. GDP per Capita

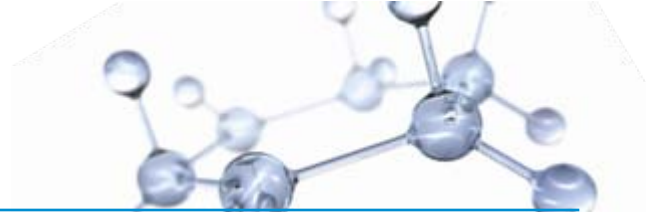


Vehicles

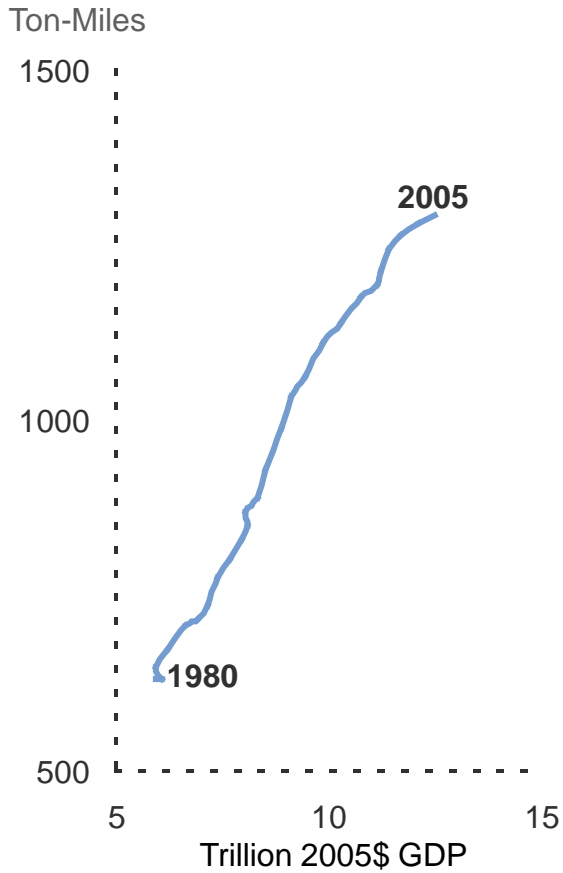
Cars per 1000 People



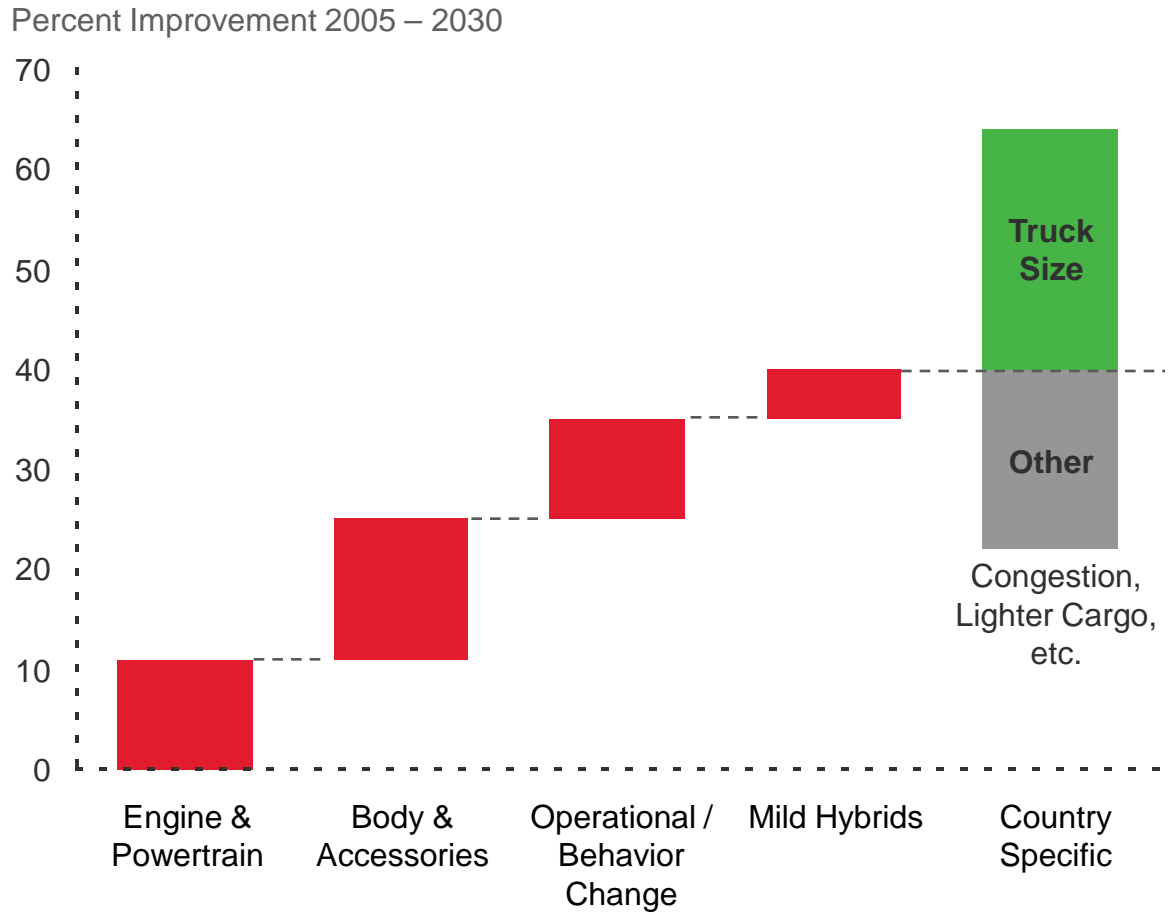
Heavy Duty Vehicles



Road Freight – US



New Truck Efficiency

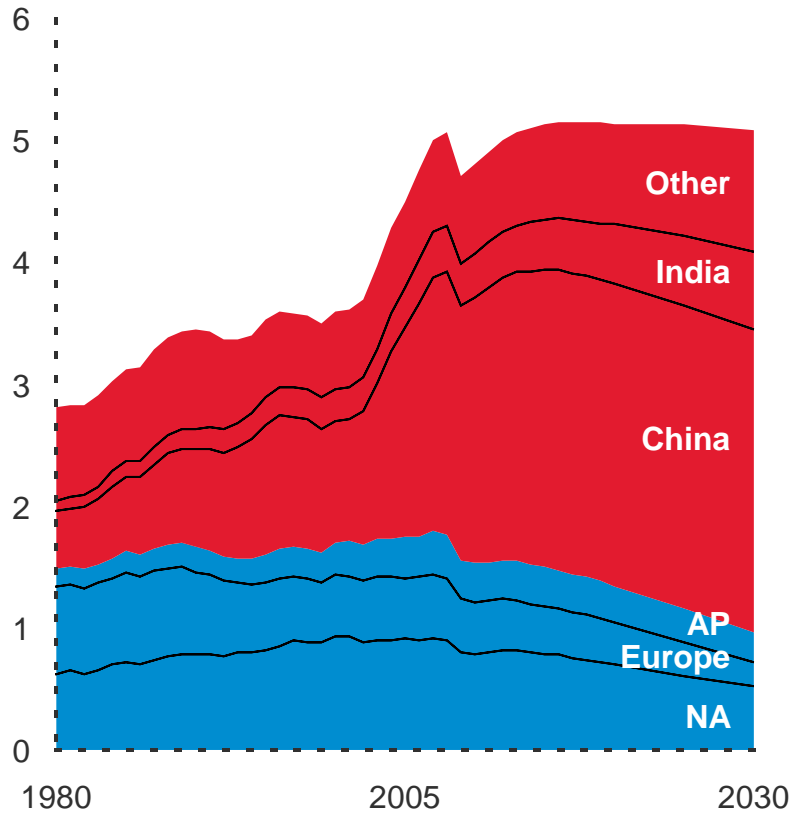


Coal



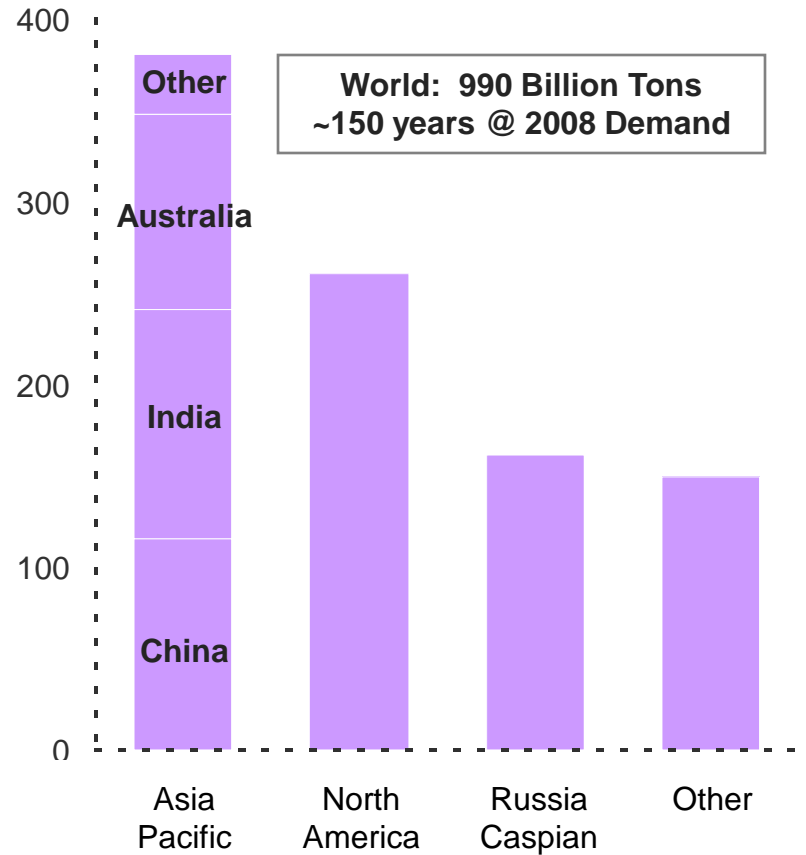
Demand

Billion Tons

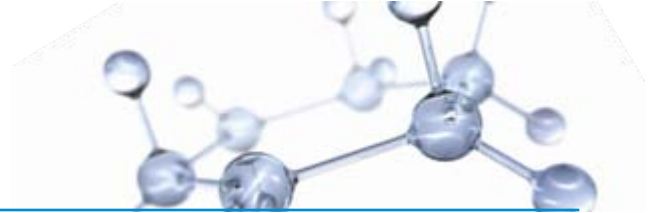


Reserves

Billion Tons



36 MPG in 2010

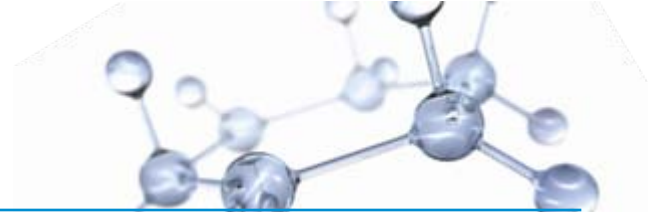


Smart fortwo

- 1808 lbs
- 3-cyl, 1-L, 70 Hp engine



50 MPG in 2010



Prius

- 3042 lbs
- 4-cyl, 1.8 L, 134 Hp engine
- 0 – 60 in 10 seconds

