ExxonMobil

Taking on the world's toughest energy challenges.™

The Outlook for Energy

a view to 2030

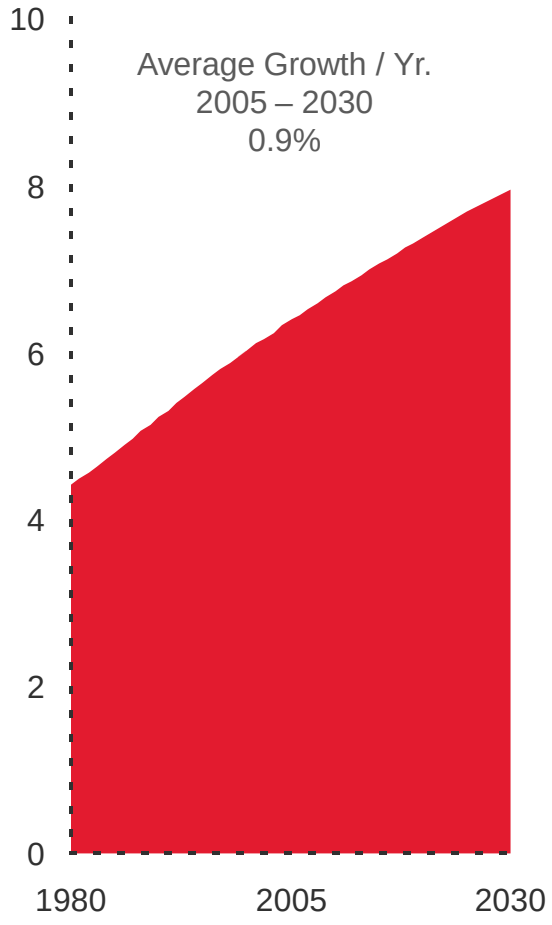
US EIA and John Hopkins University 2010 Energy Conference

Tom Eizember
Corporate Strategic Planning
6 April 2010

Global Economics and Energy

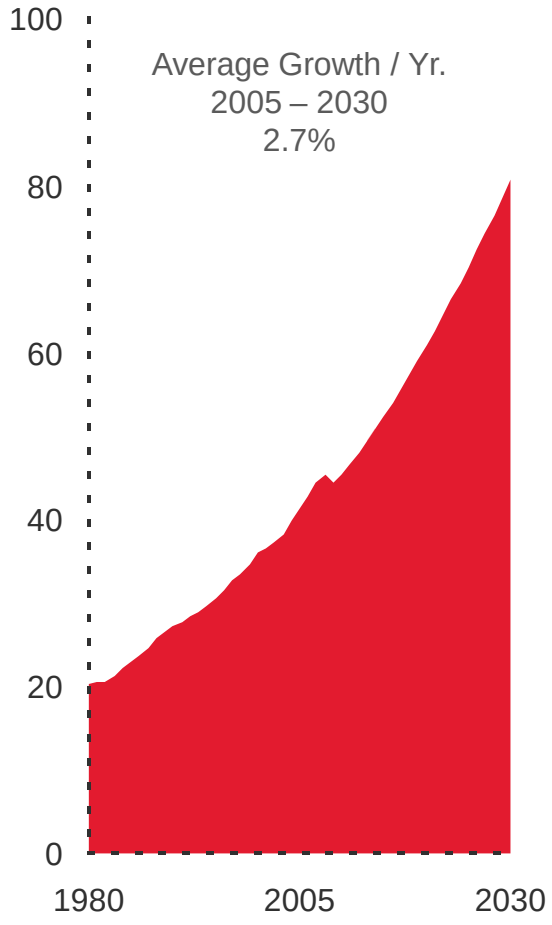
Population

Billion



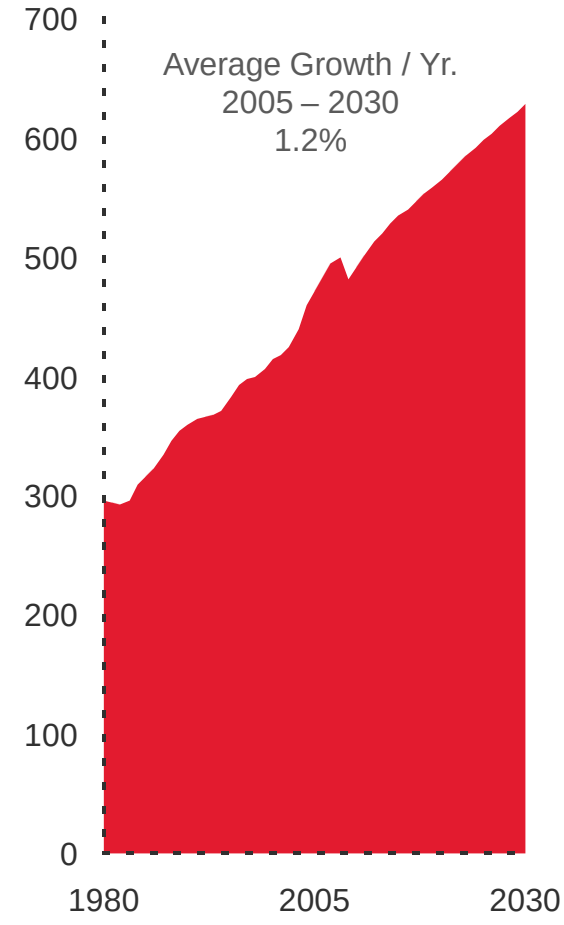
GDP

Trillion 2005$



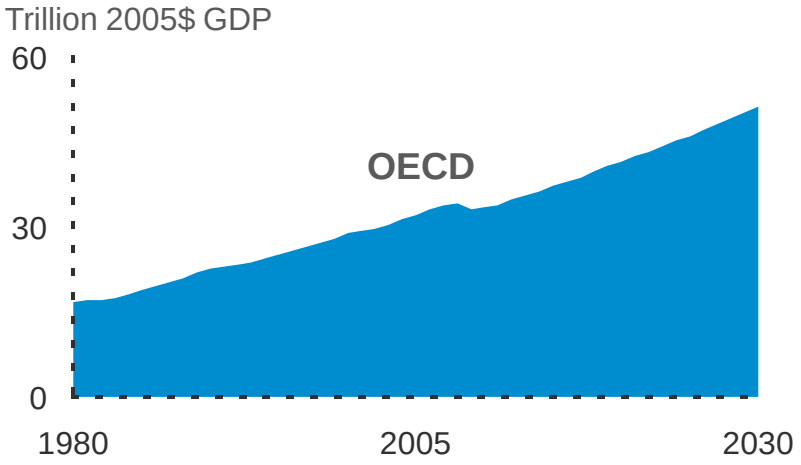
Energy Demand

Quadrillion BTUs

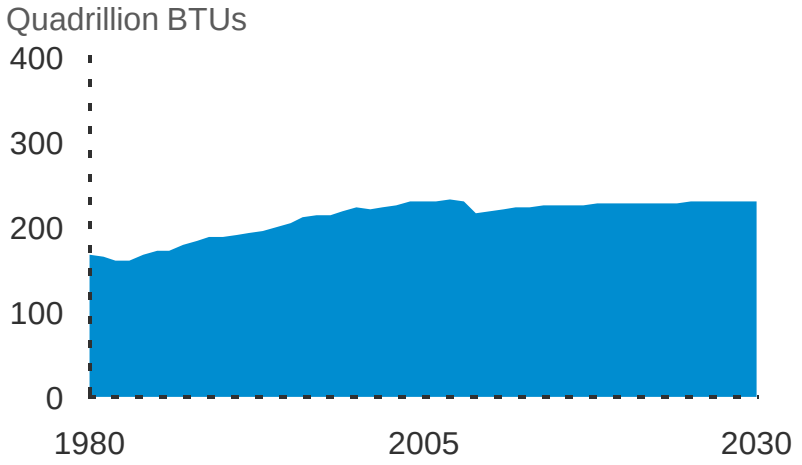


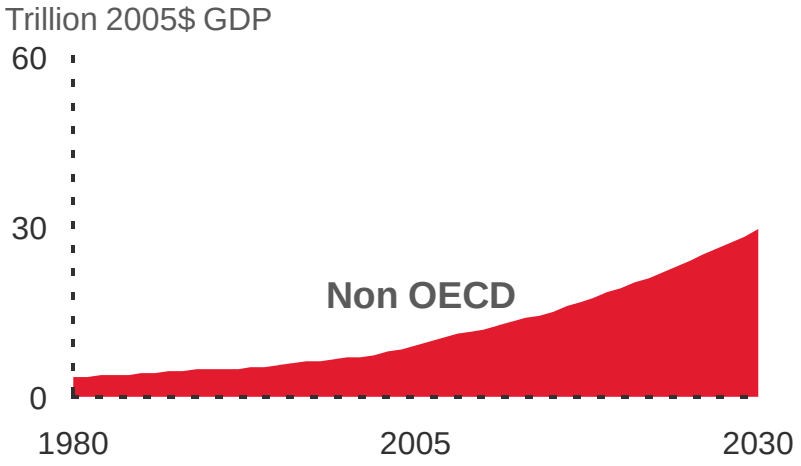
Economic Growth Drives Energy Demand

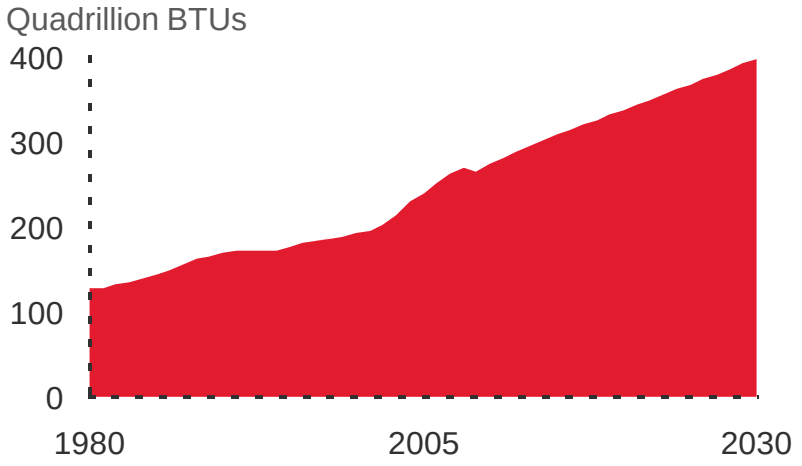
GDP



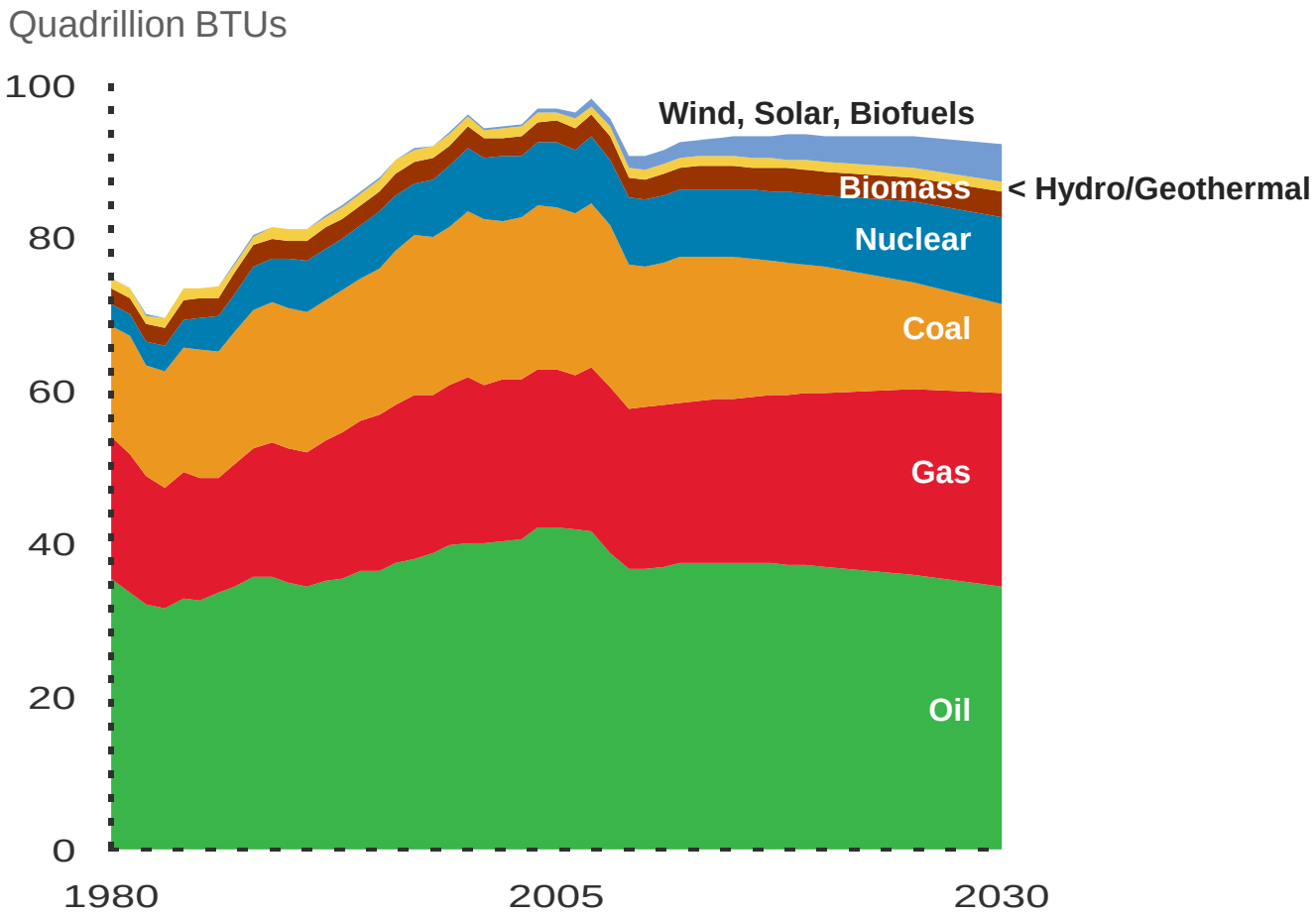
Demand







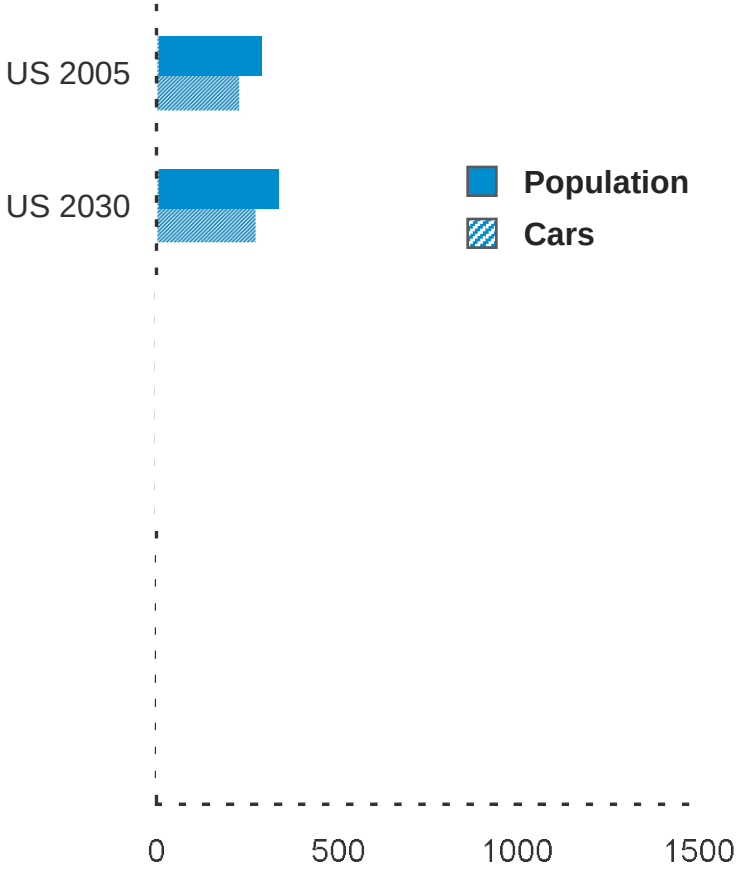
US Primary Energy Supply



Personal Vehicle Fleet

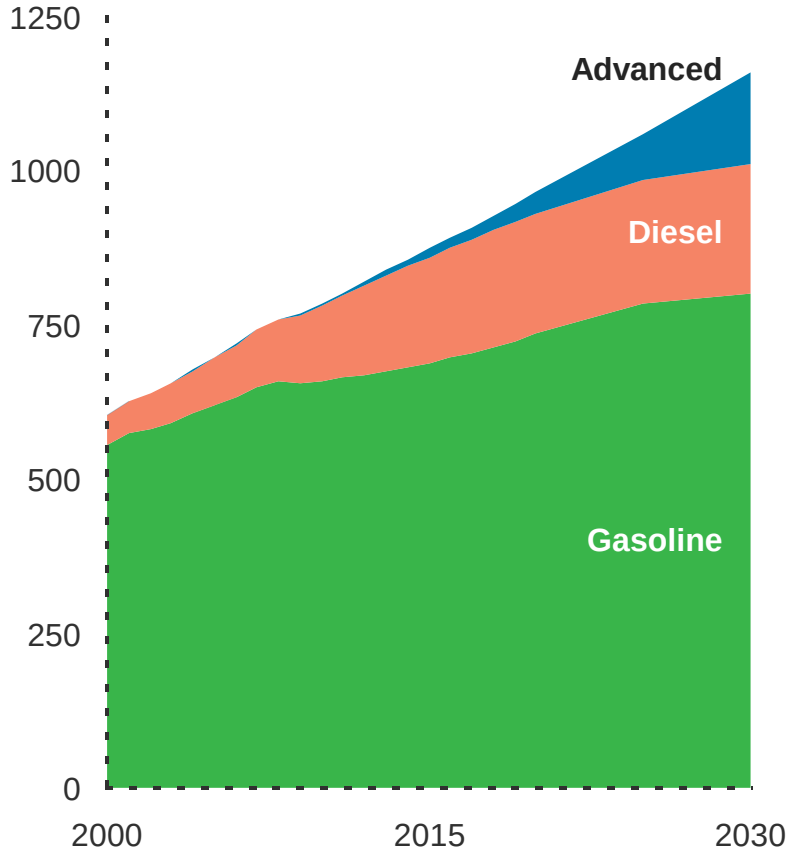
Vehicle Penetration

Cars and Population (millions)



Fleet by Car Type

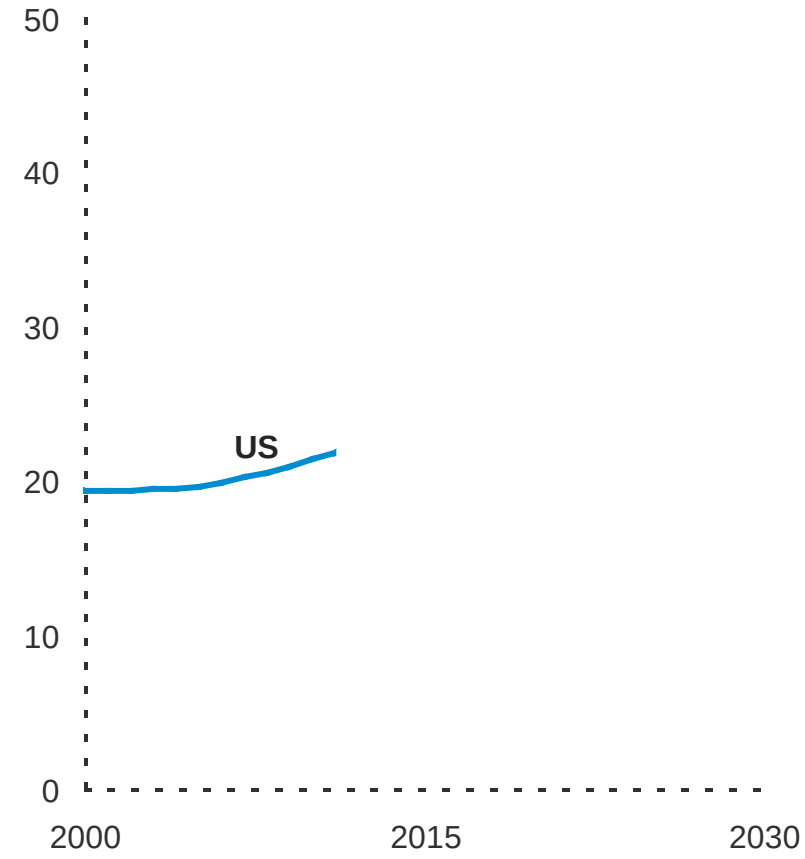
Million Cars



Global Transportation Demand

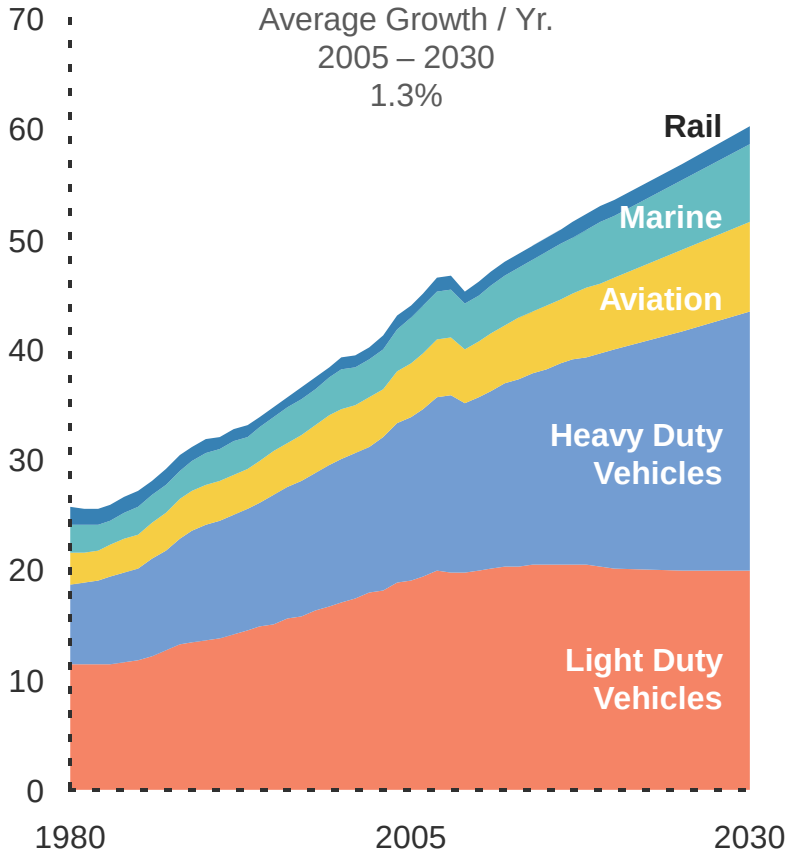
Average New Car

MPG



By Sector

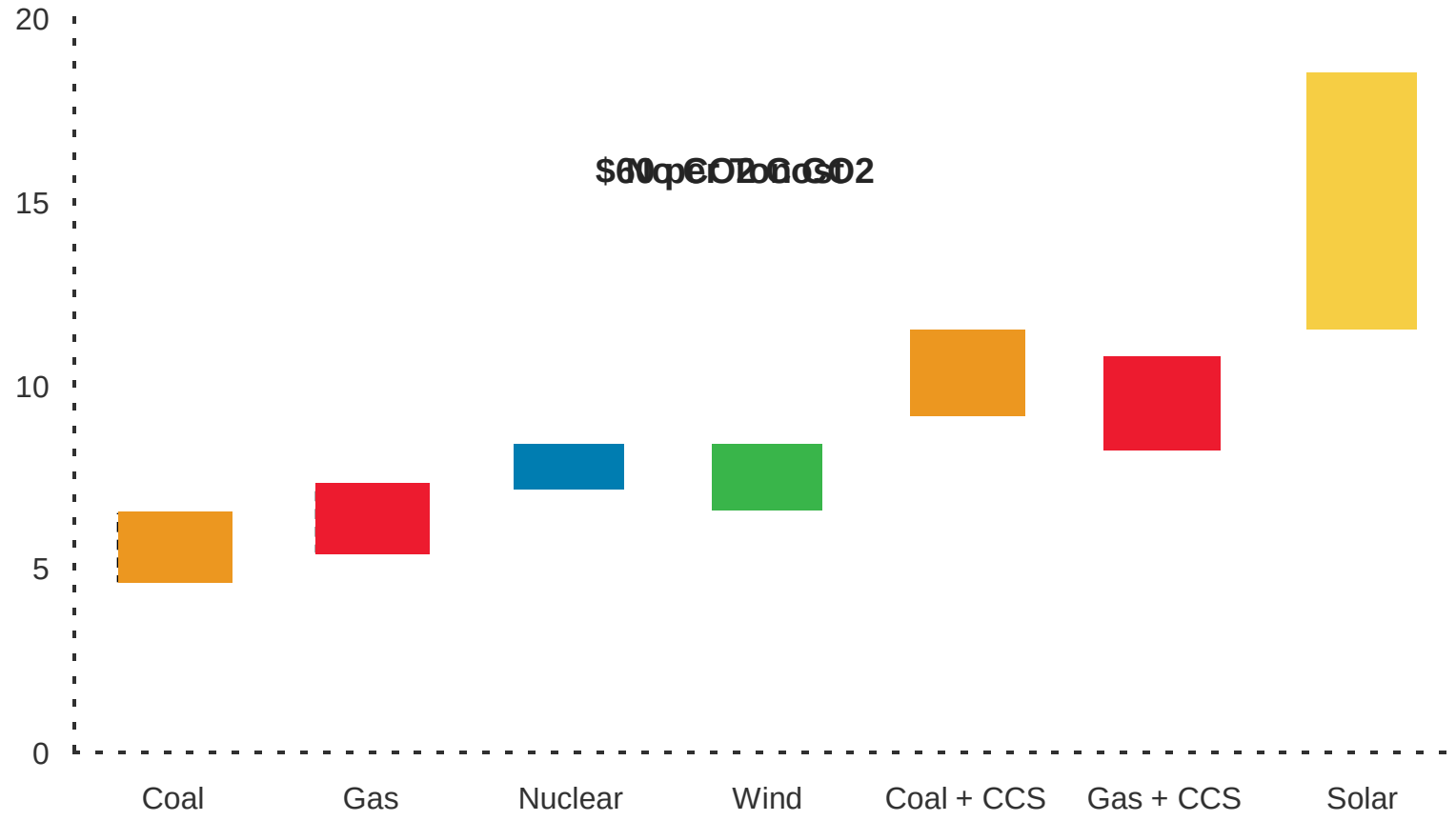
MBDOE



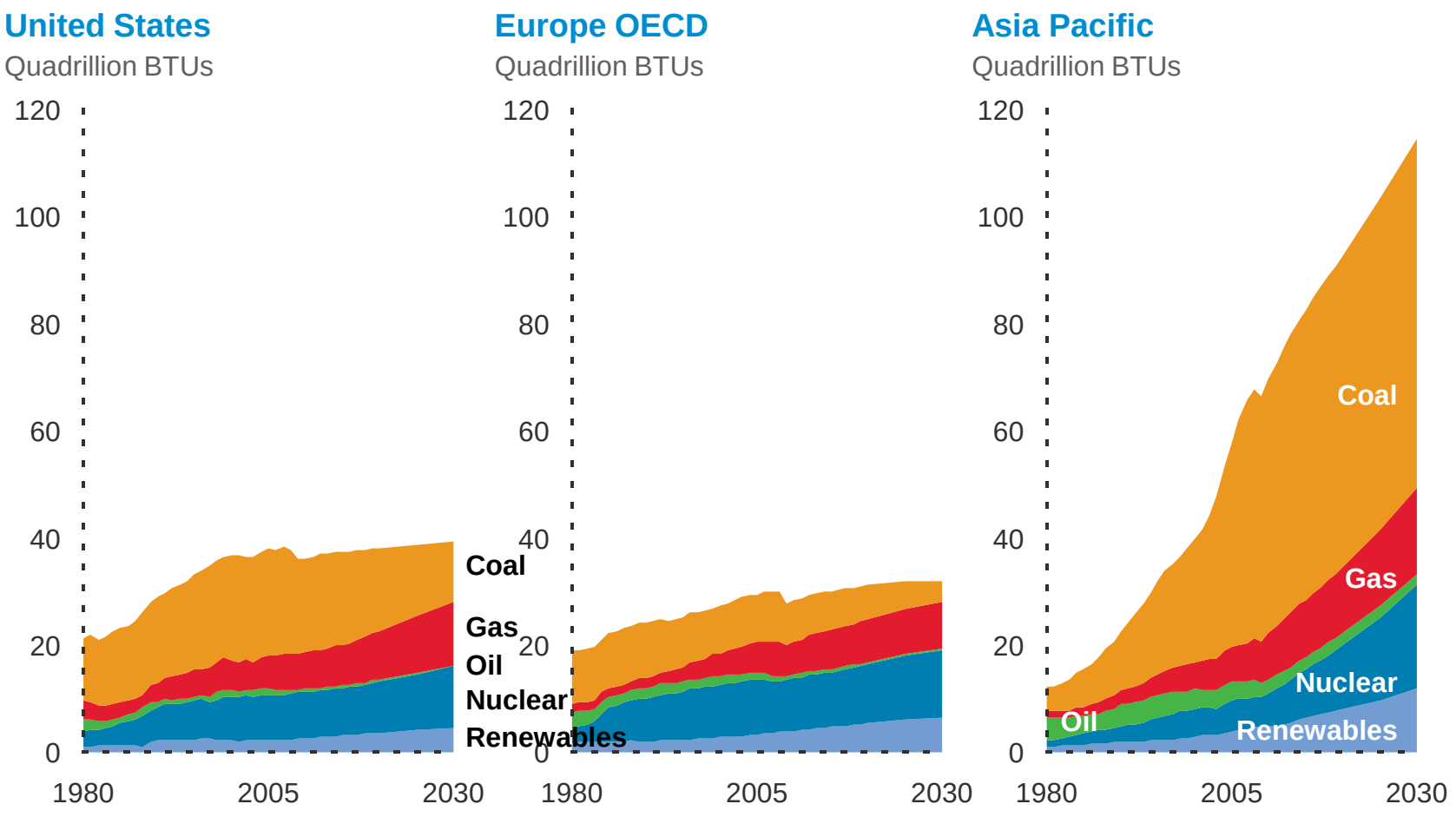
Electricity Generation Cost

US Baseload, Startup 2025

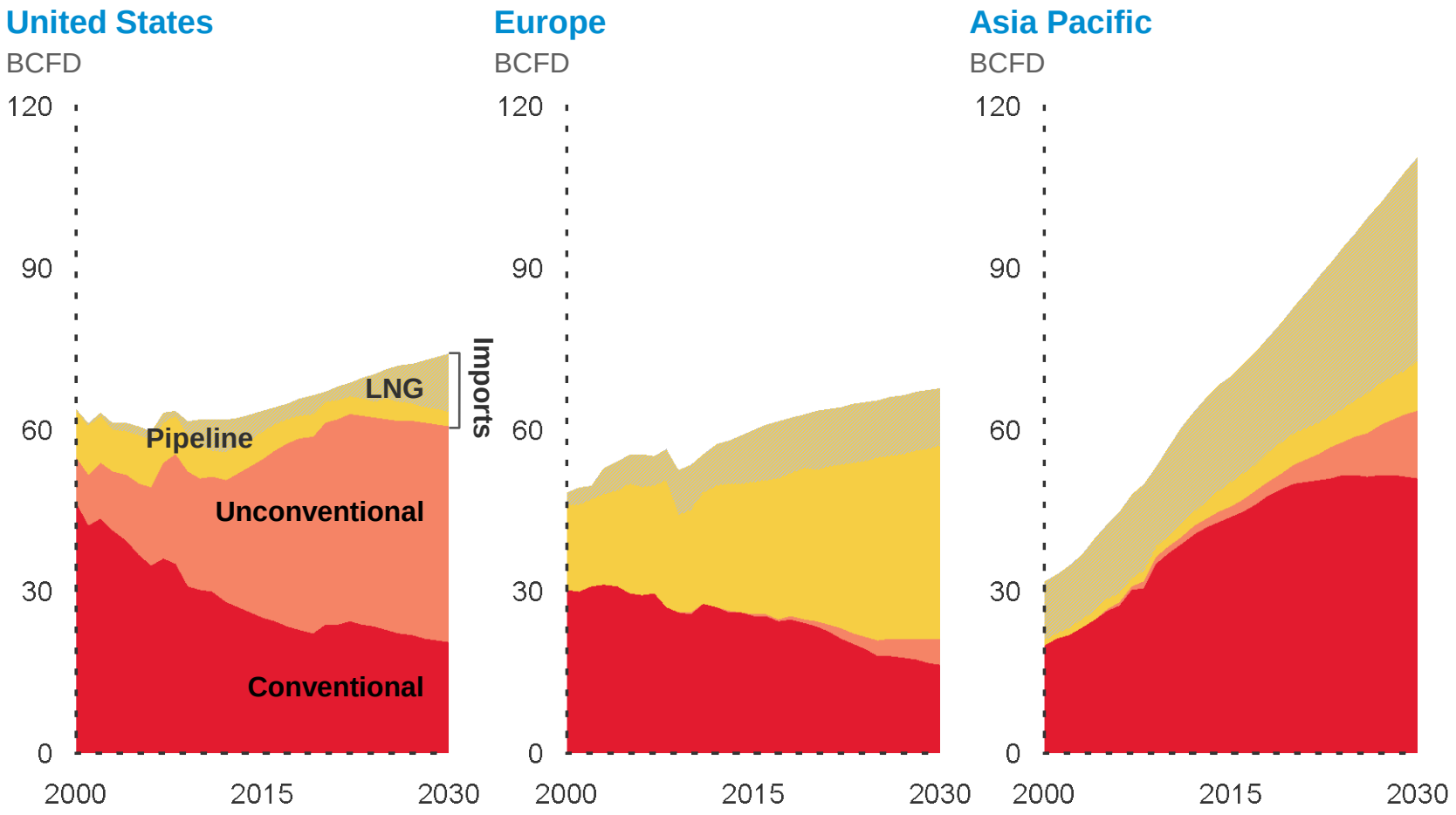
2009 Cents/kWhr



Power Generation Fuel Demand



Gas Supply and Demand Balance

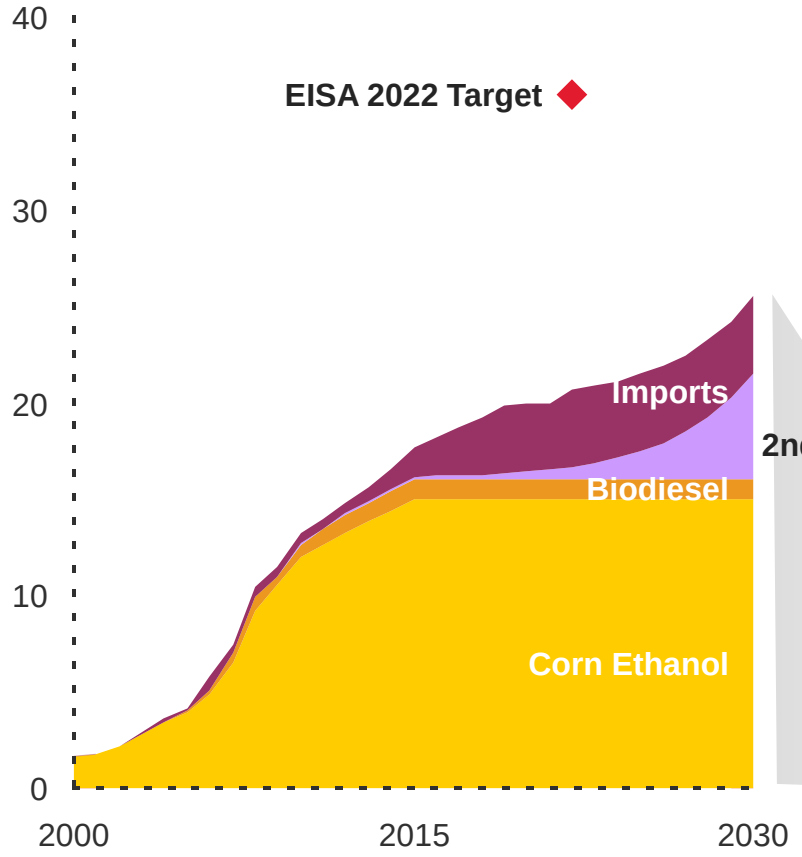


LNG: Liquefied Natural Gas

Biofuels

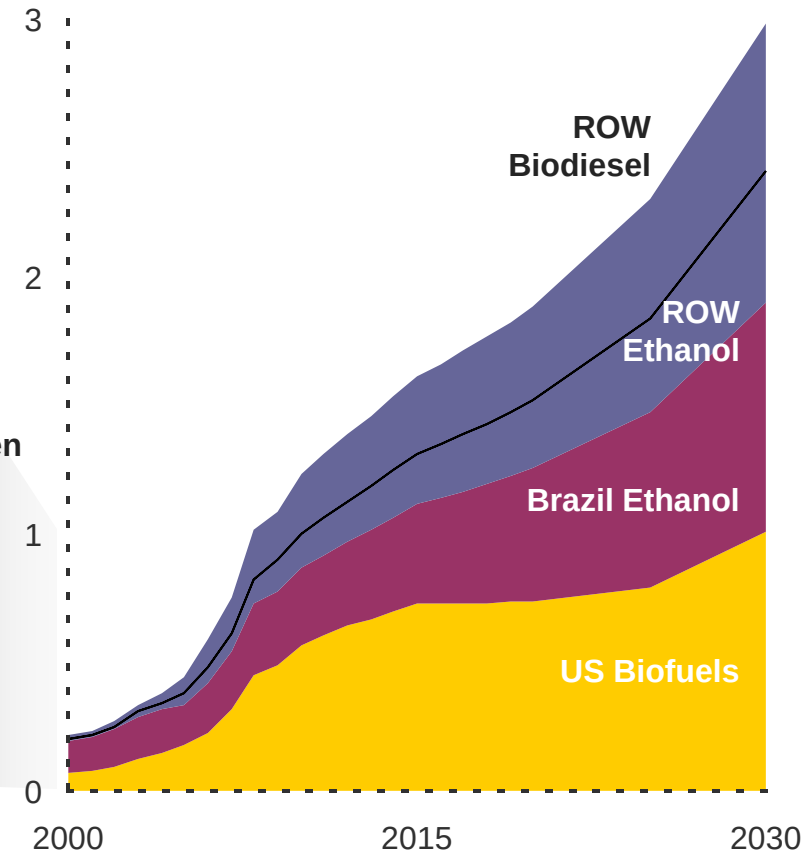
US Supply

Billion Gallons



Global Supply

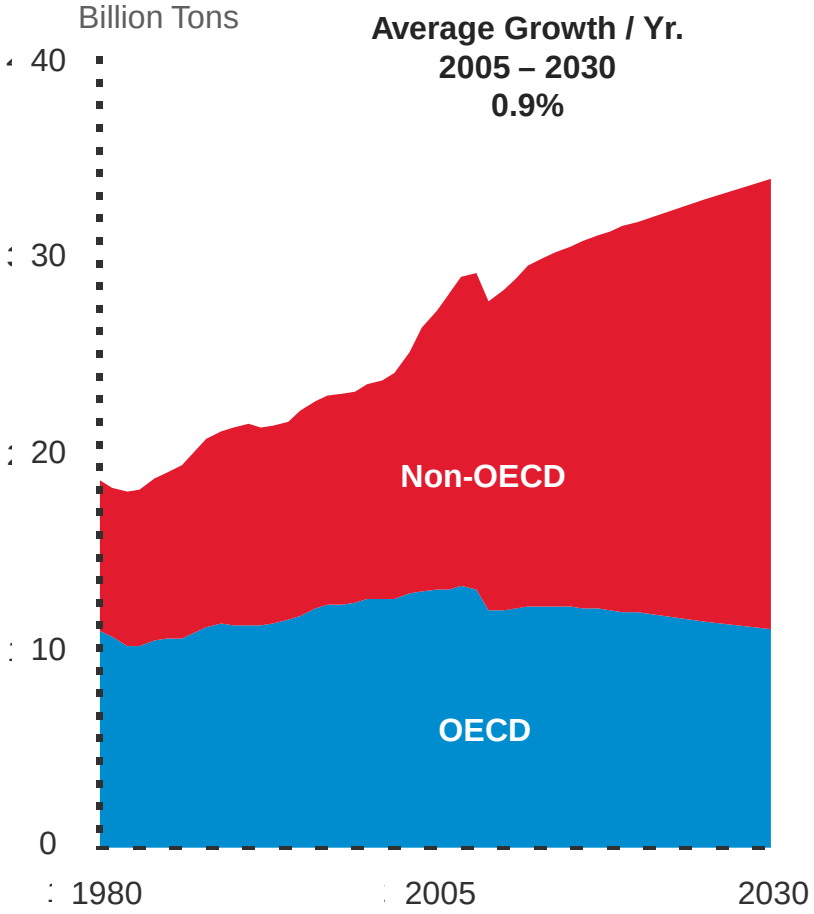
MBDOE



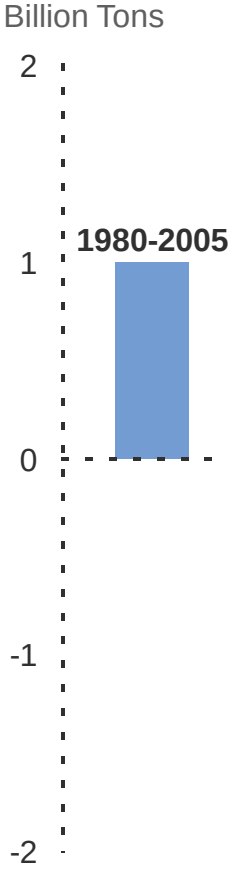
*EISA: Energy Independence and Security Act

CO_2 Emissions

Global CO_2 Emissions



Change in US CO_2 Emissions



Integrated Energy Solutions

Now

- 6.7 billion people
- Global economic linkages
- Disparate living stand
- Enormous energy r
- Environmental gai
- Growing technology

2030

- on people
- OECD leads economic growth
- living standards improve
- eeds up one-third
- ironmental goals
- ances in technology

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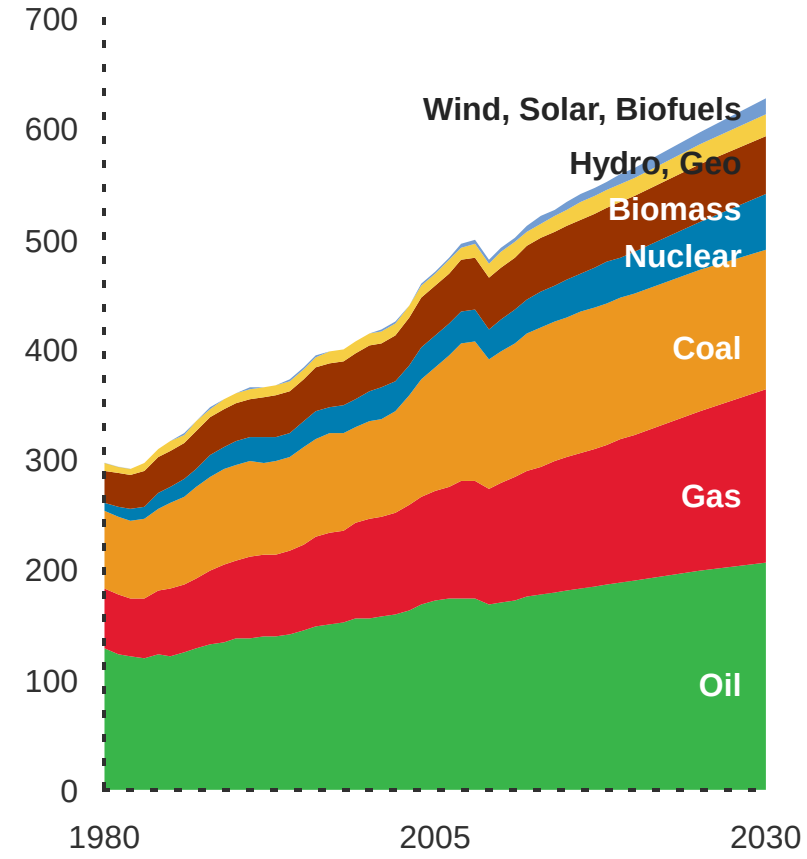
Primary Energy Supply

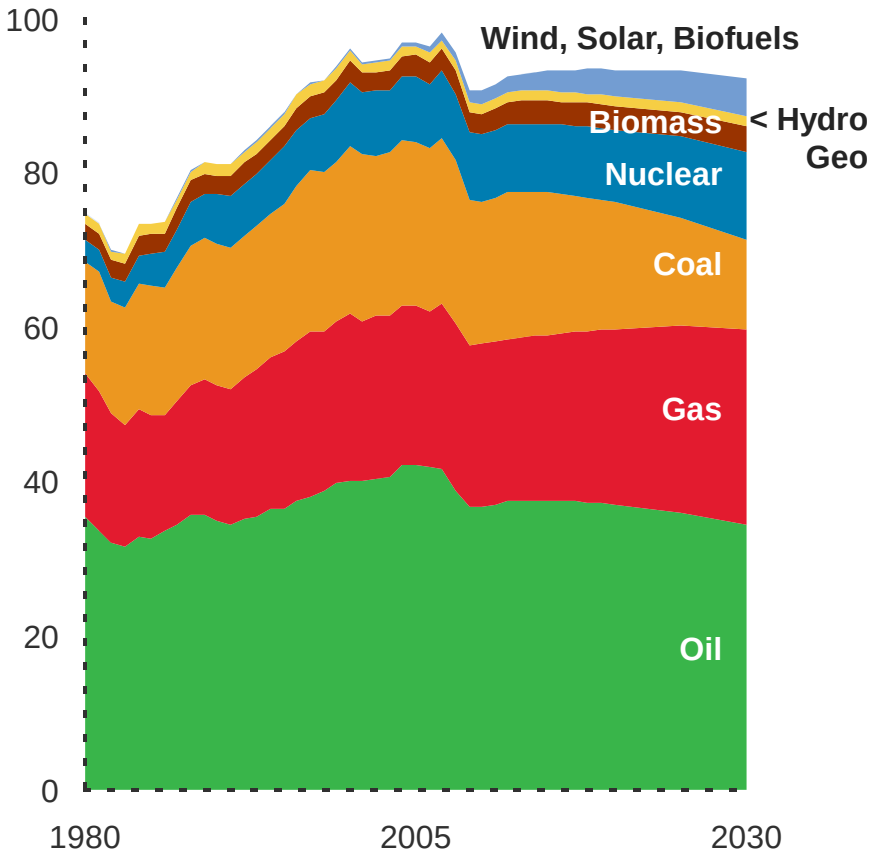
Global

Quadrillion BTUs



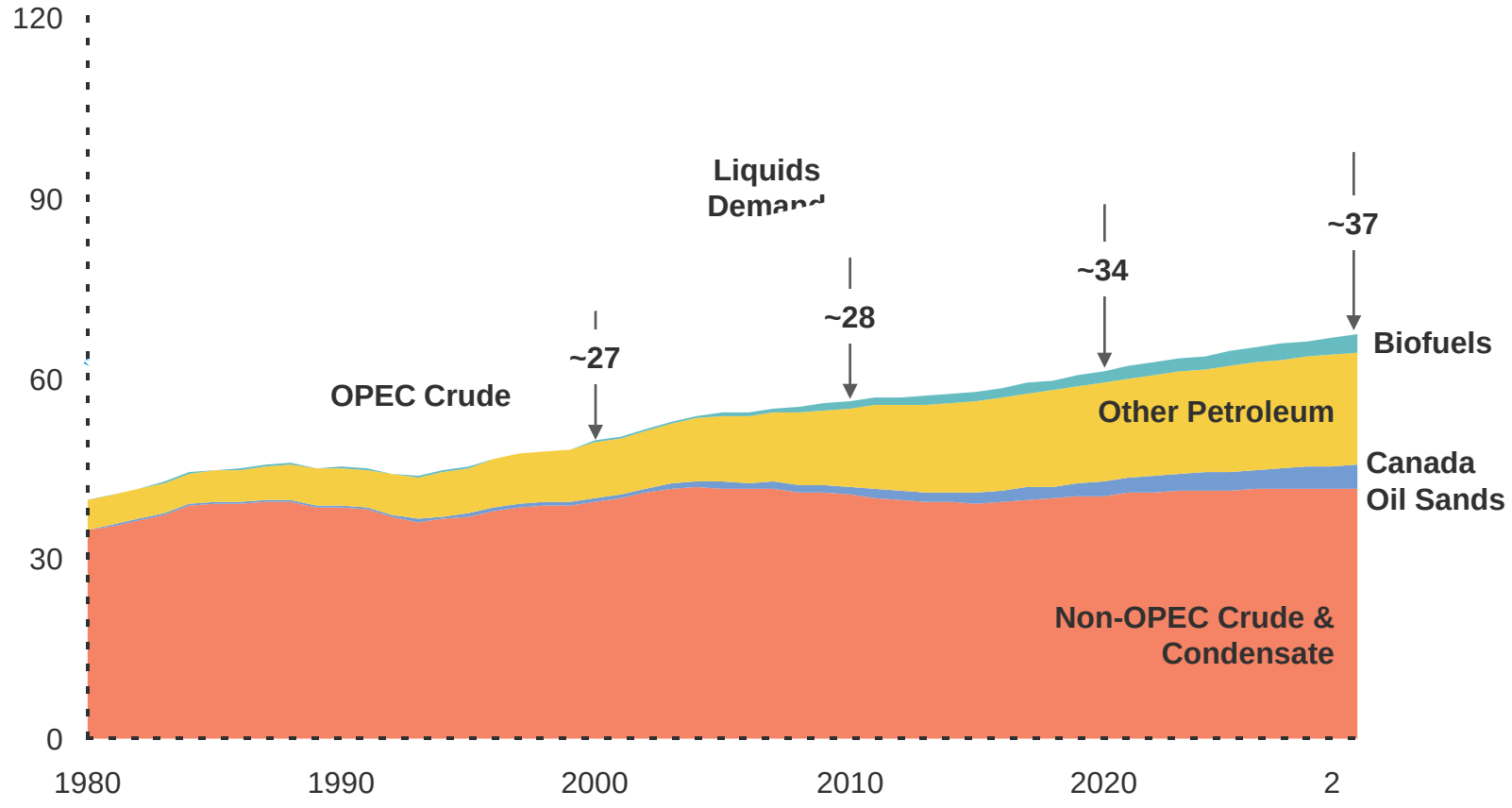
US

Quadrillion BTUs



Global Liquids Supply

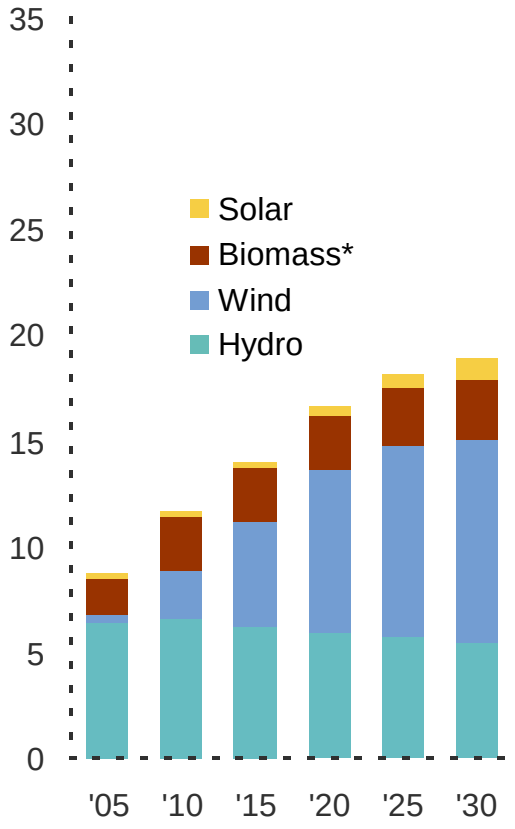
Global Liquids Supply and Demand



Renewables by Region

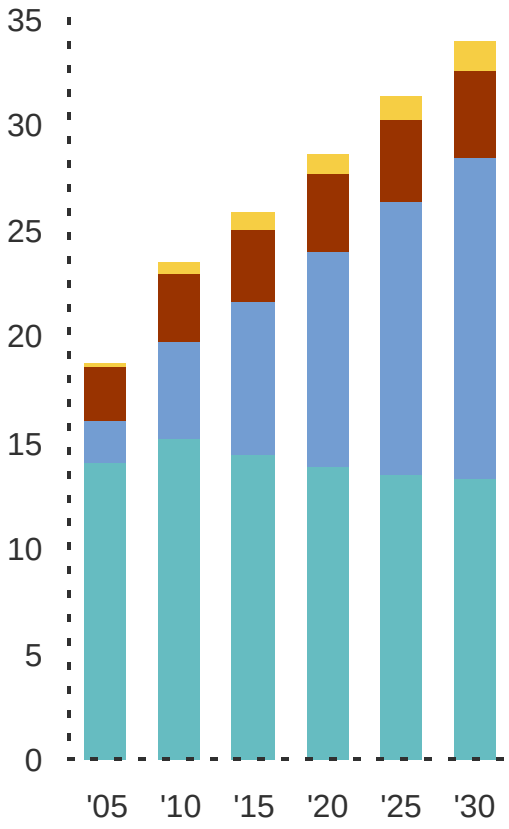
United States

Percent of TWhr



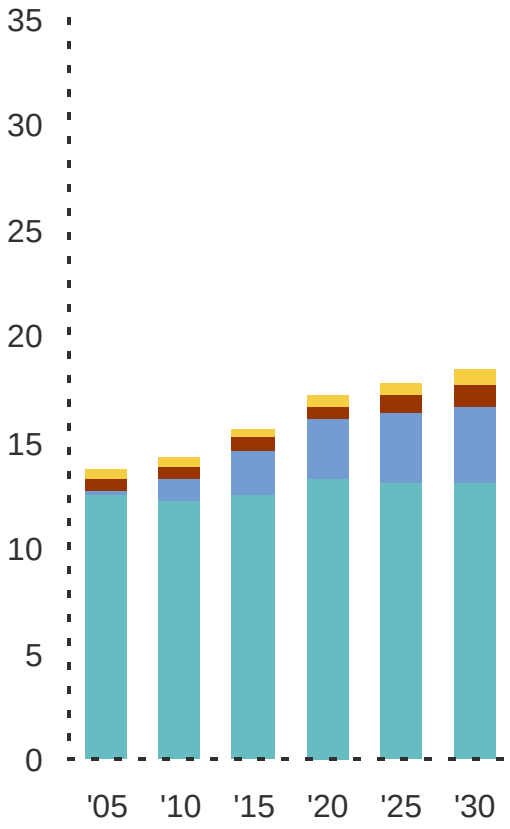
Europe OECD

Percent of TWhr



Asia Pacific

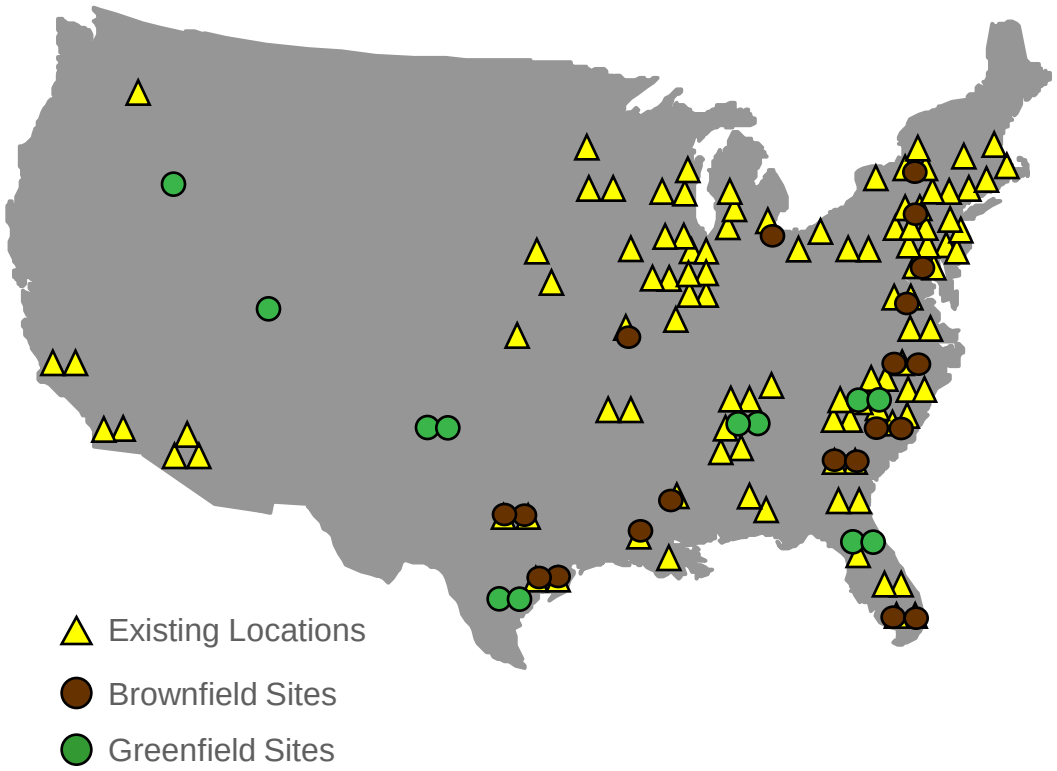
Percent of TWhr



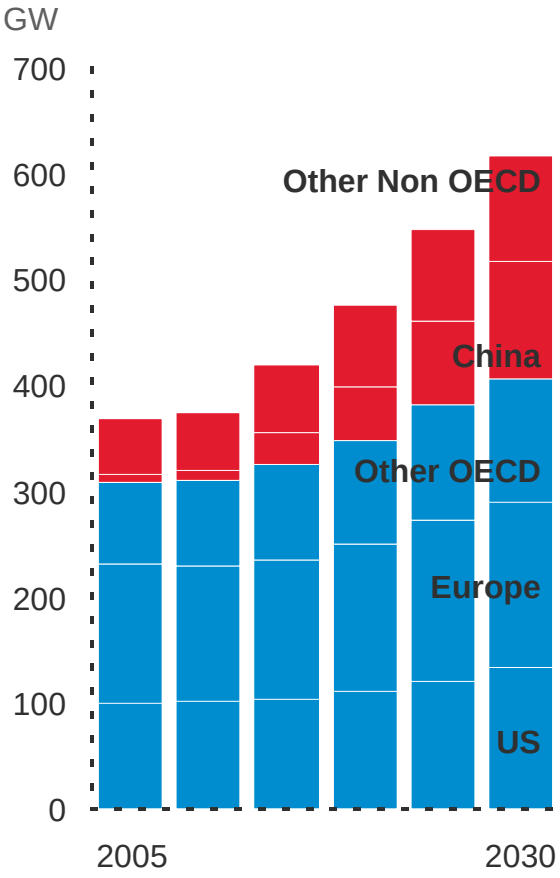
*Biomass includes Municipal Solid Waste

Nuclear

US Nuclear Reactors

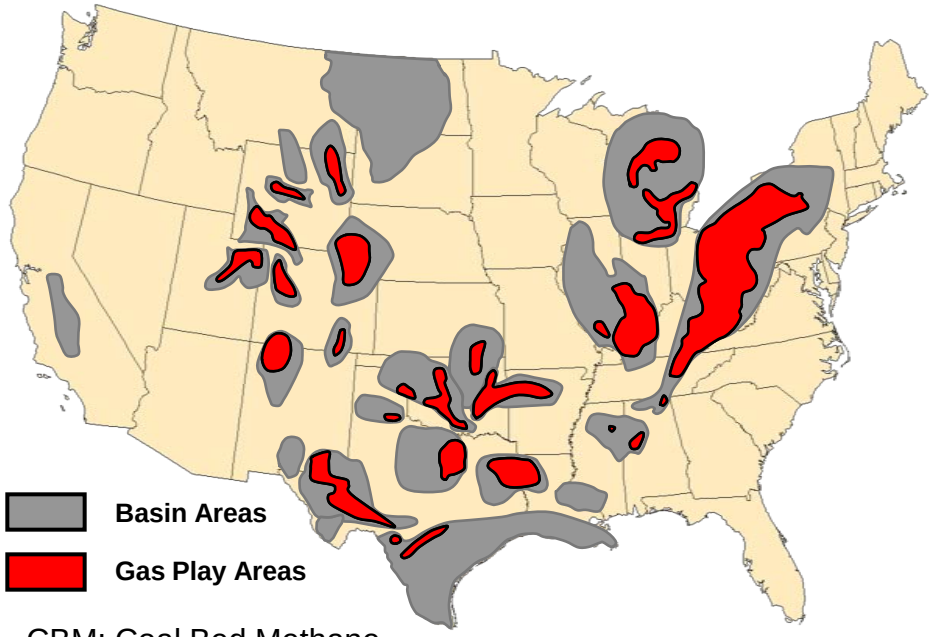


Global Capacity



U.S. Natural Gas Supply

Shale/Tight Gas and CBM Basins

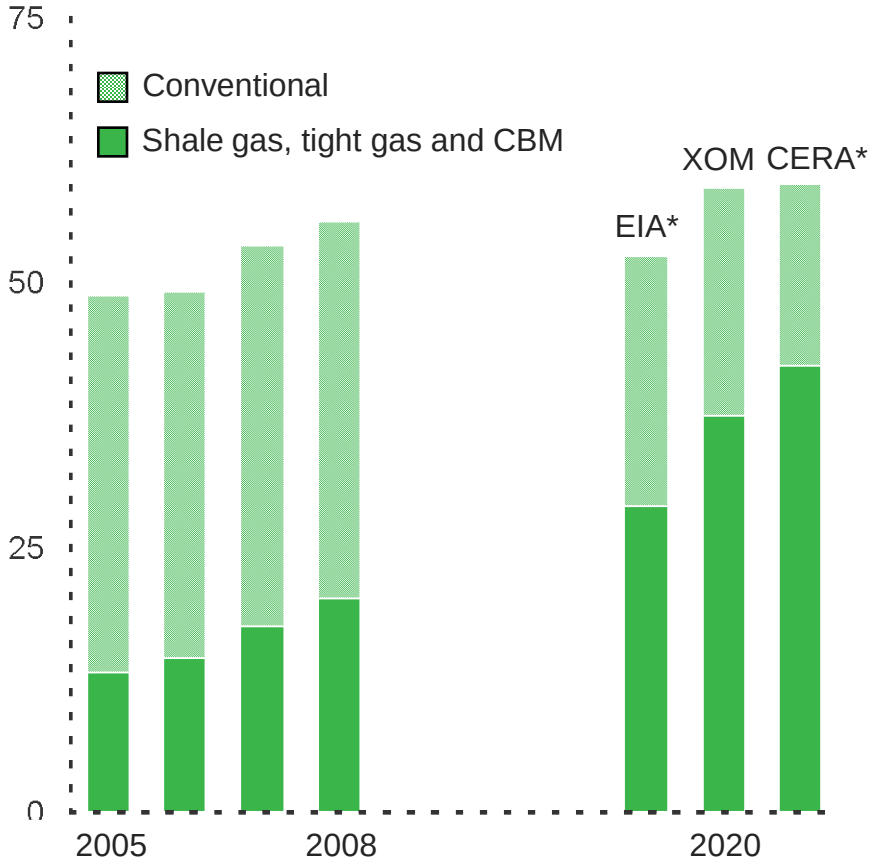


CBM: Coal Bed Methane

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

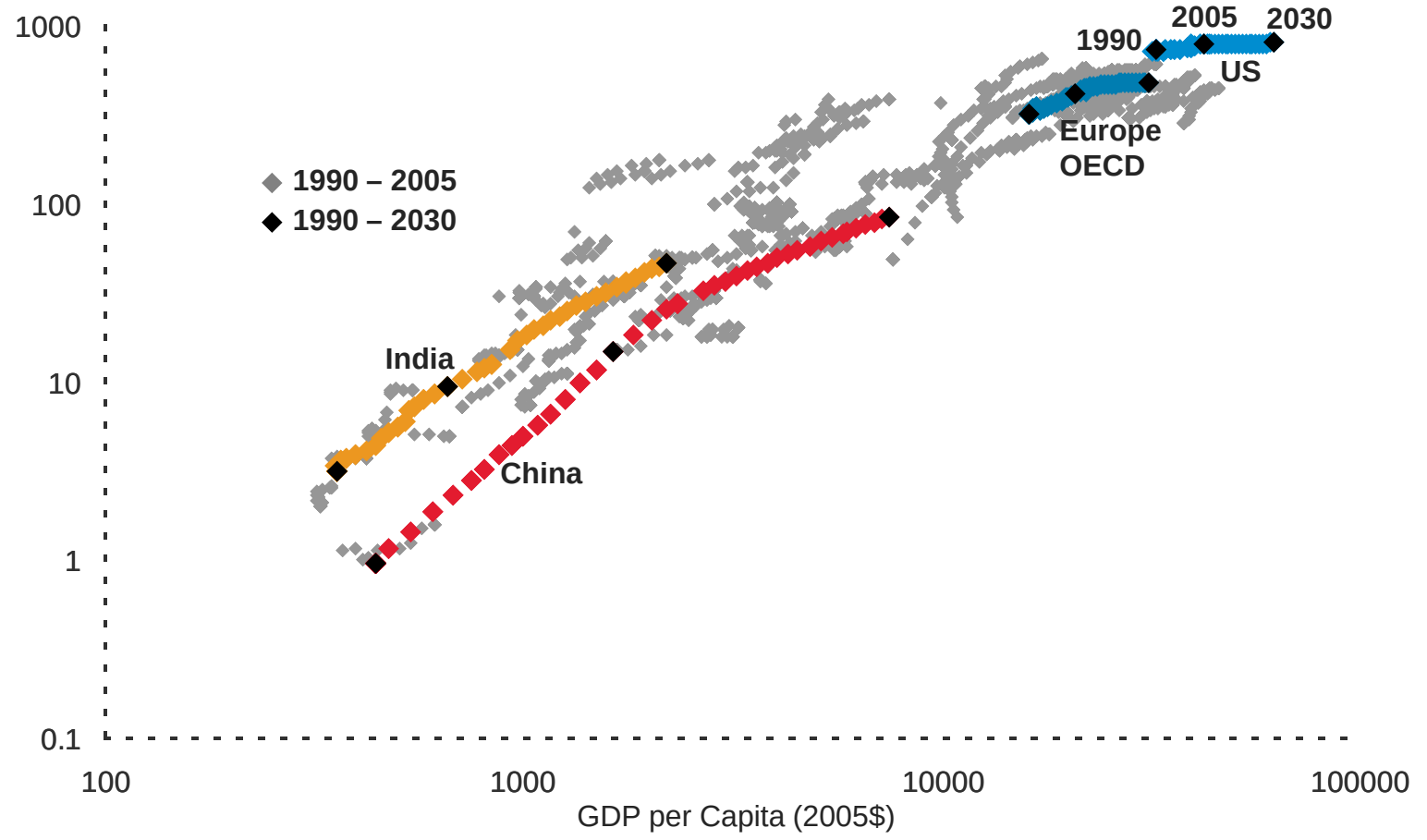
Production Outlook

Billion Cubic Feet per Day



* EIA and CERA Outlooks do not include Alaska pipeline

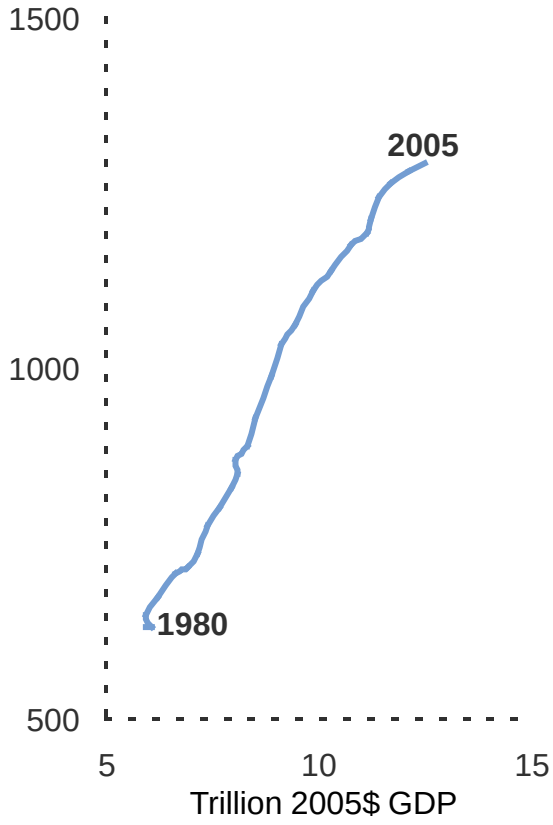
Light Duty Vehicles vs. GDP per Capita



Heavy Duty Vehicles

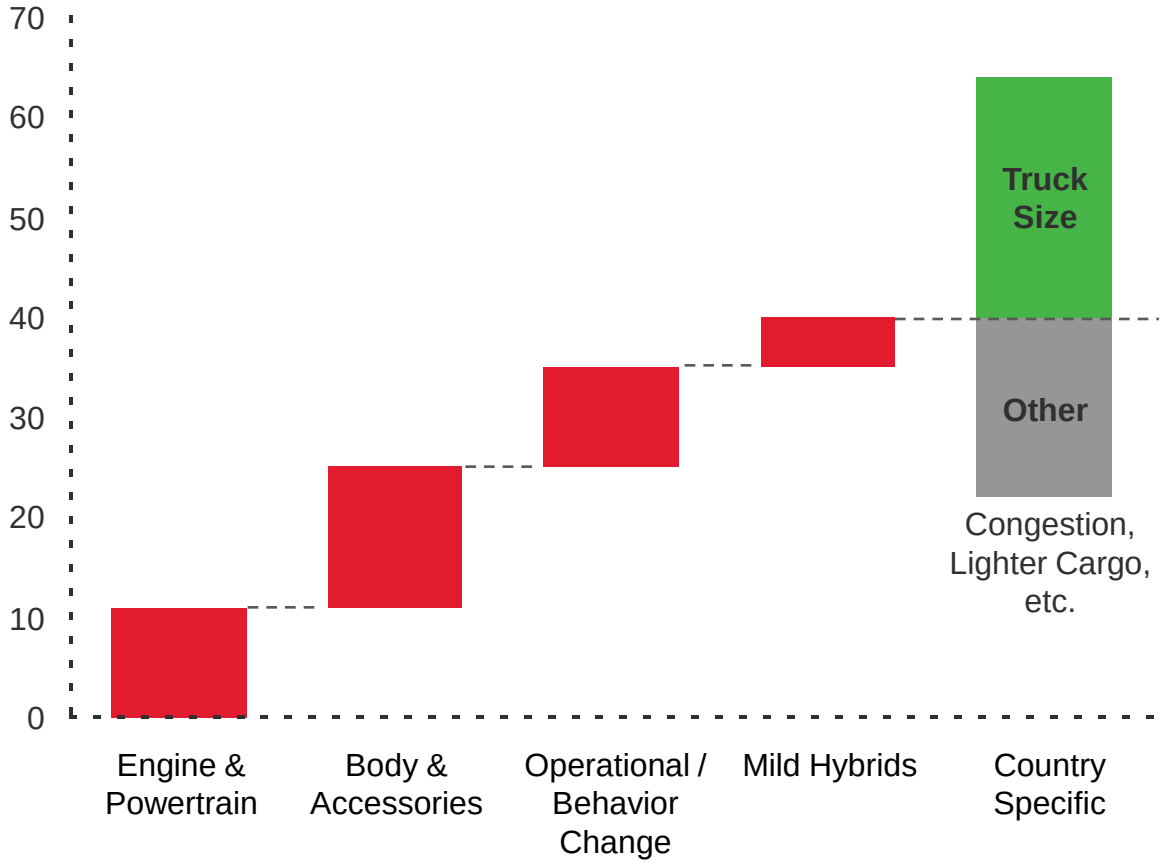
Road Freight – US

Ton-Miles



New Truck Efficiency

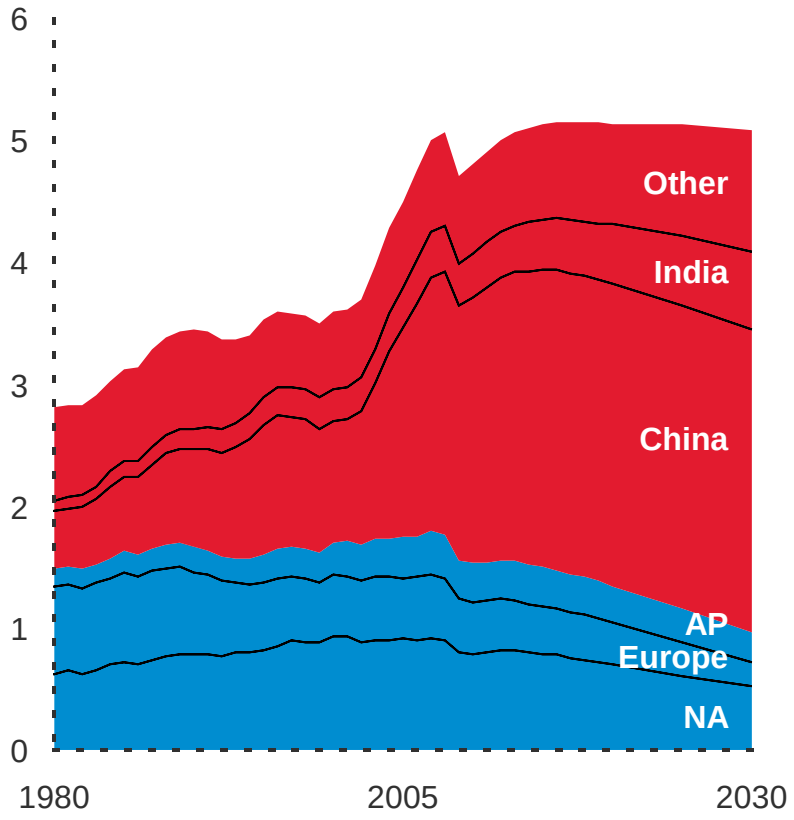
Percent Improvement 2005 – 2030



Coal

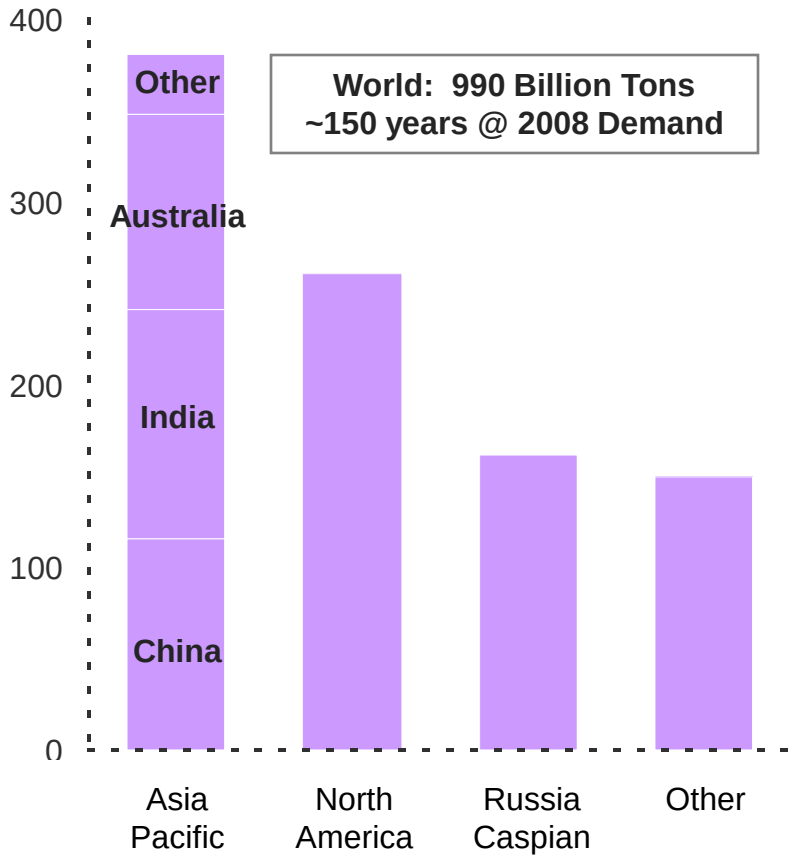
Demand

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