

ExxonMobil

Taking on the world's toughest energy challenges.™

The Outlook for Energy

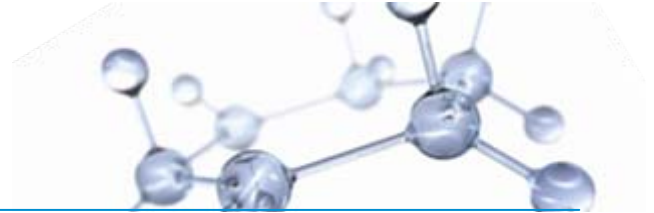
a view to 2030

Todd W. Onderdonk
Book Manufacturers' Institute
November 3, 2009

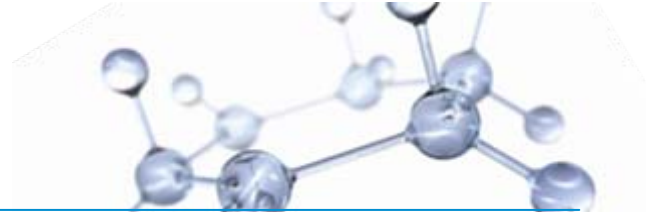


This presentation includes forward-looking statements. Actual future conditions (including economic conditions, energy demand, and energy supply) could differ materially due to changes in technology, the development of new supply sources, political events, demographic changes, and other factors discussed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

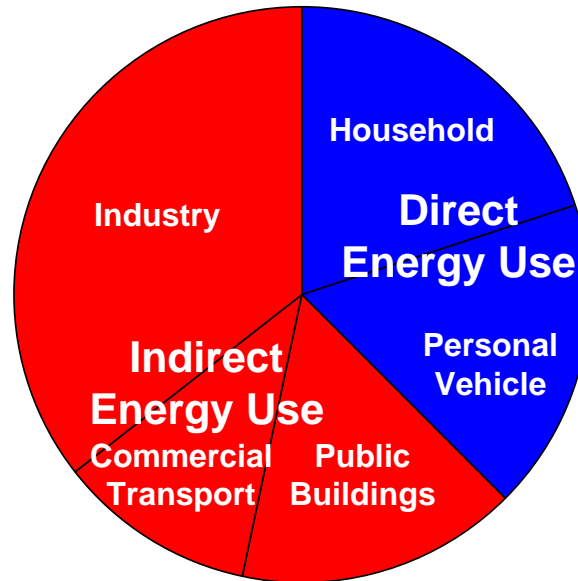
Importance of Energy



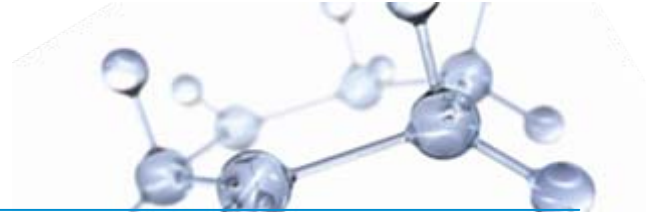
Your Energy Use



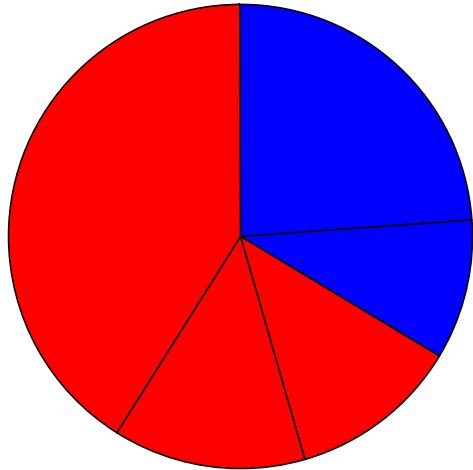
North America



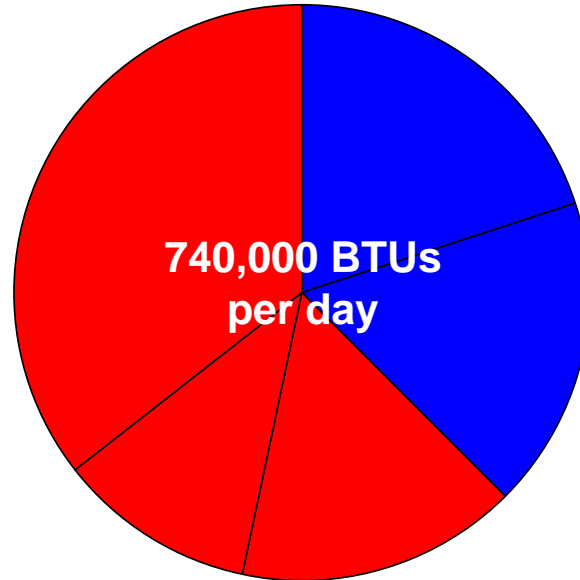
Your Energy Use



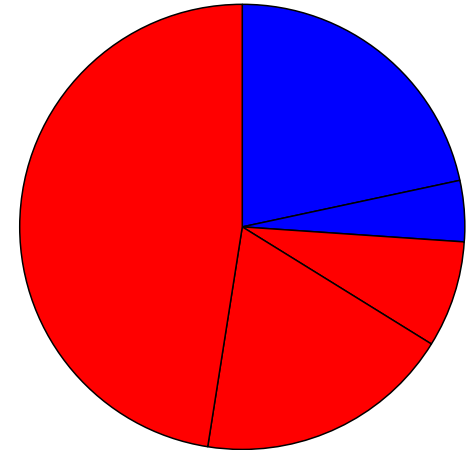
EU



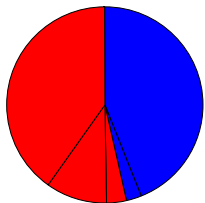
North America



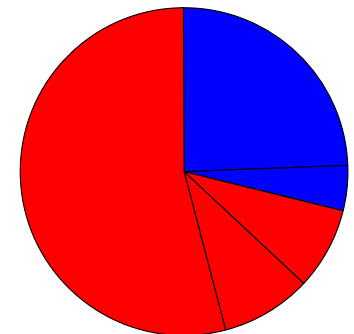
Middle East



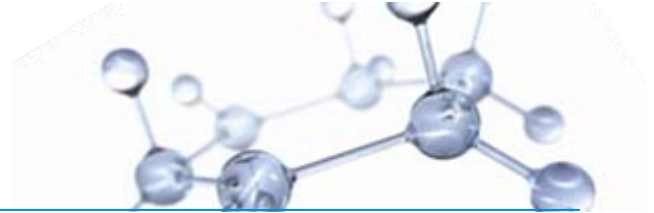
Africa



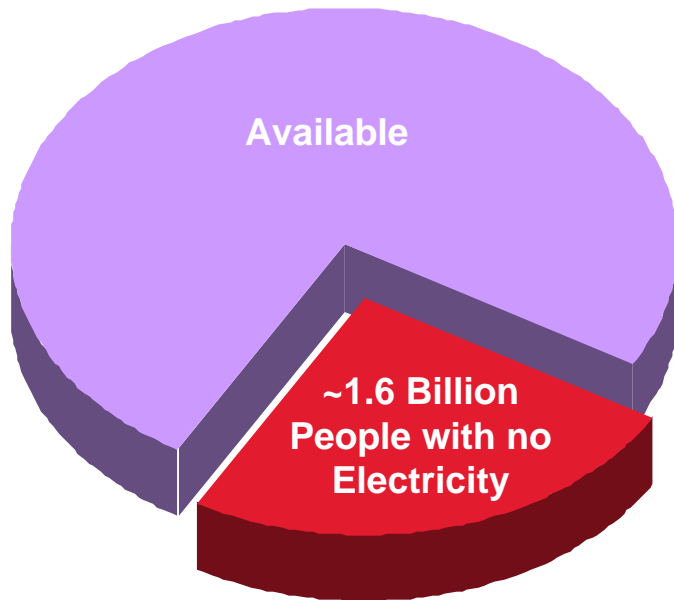
Asia Pacific



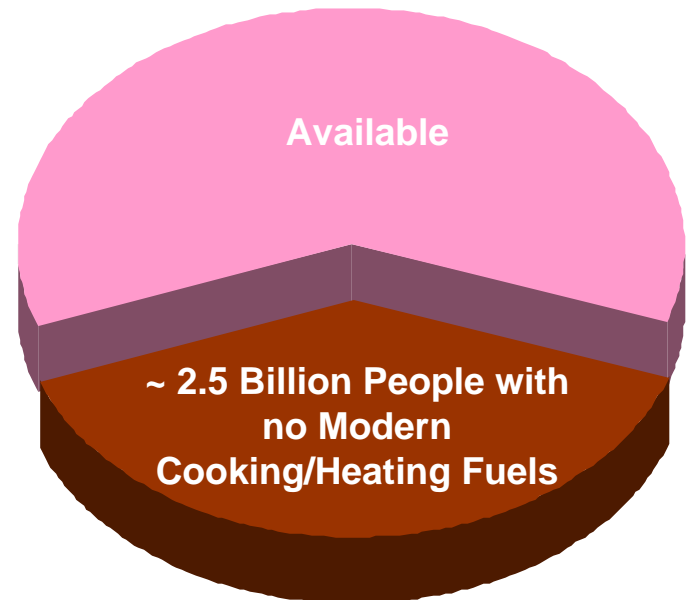
Challenge: Meeting Basic Needs



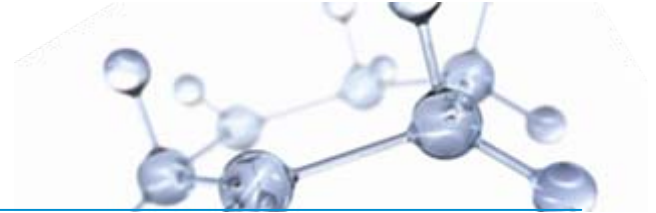
Electricity



Modern Cooking/Heating Fuels

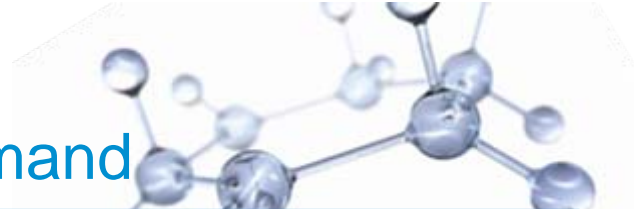


Our Key Energy Challenges



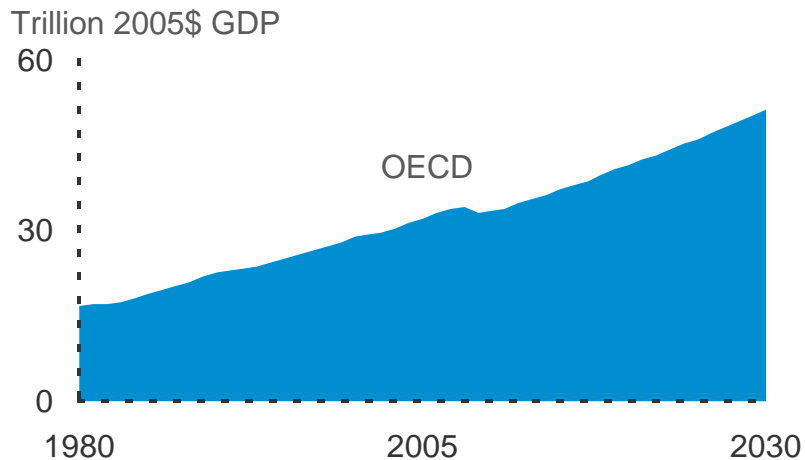
- Reducing poverty and improving living standards
 - Supporting economic growth
 - Minimizing impacts on the environment
 - Maintaining energy security
- Development of reliable and affordable energy – plus ongoing efficiency gains – are essential to meeting these challenges...



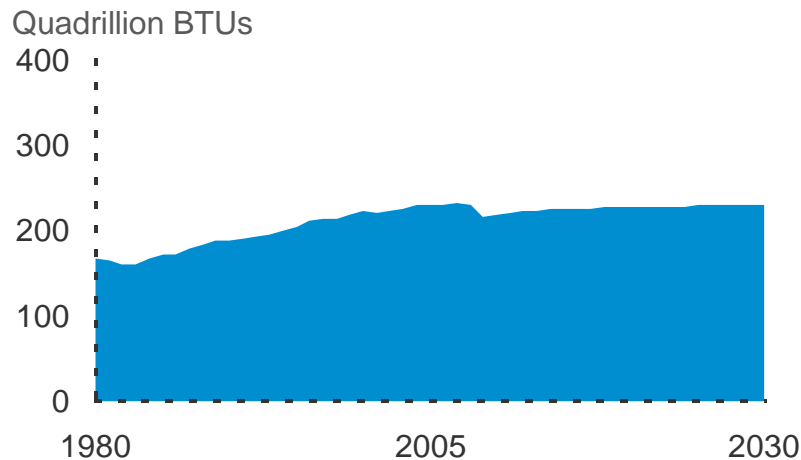


Economic Growth Drives Energy Demand

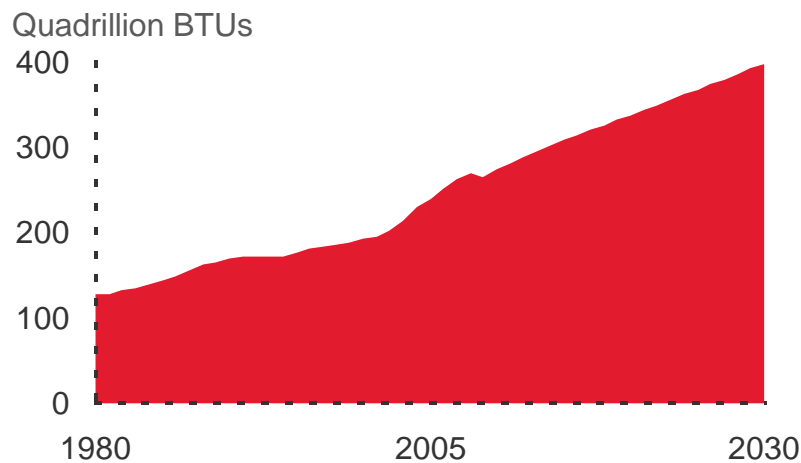
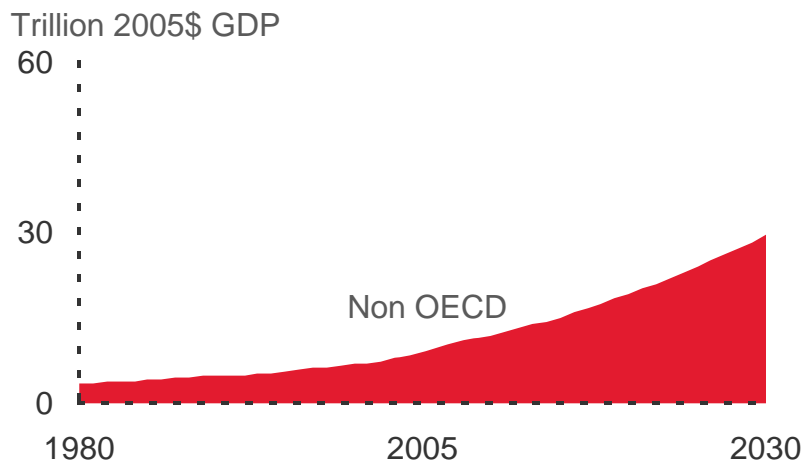
GDP



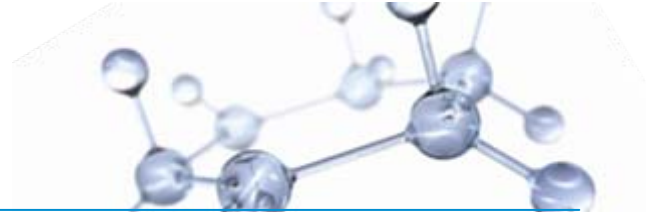
Demand



Non OECD



Scale of Global Energy Is Enormous



On average, a city of 1 million people in an OECD country:

Uses ~6 Million BTUs of energy every second

Consumes ~1,200 gallons of oil per minute

Requires two dedicated, world-scale power plants

Uses 170 tons of coal each hour

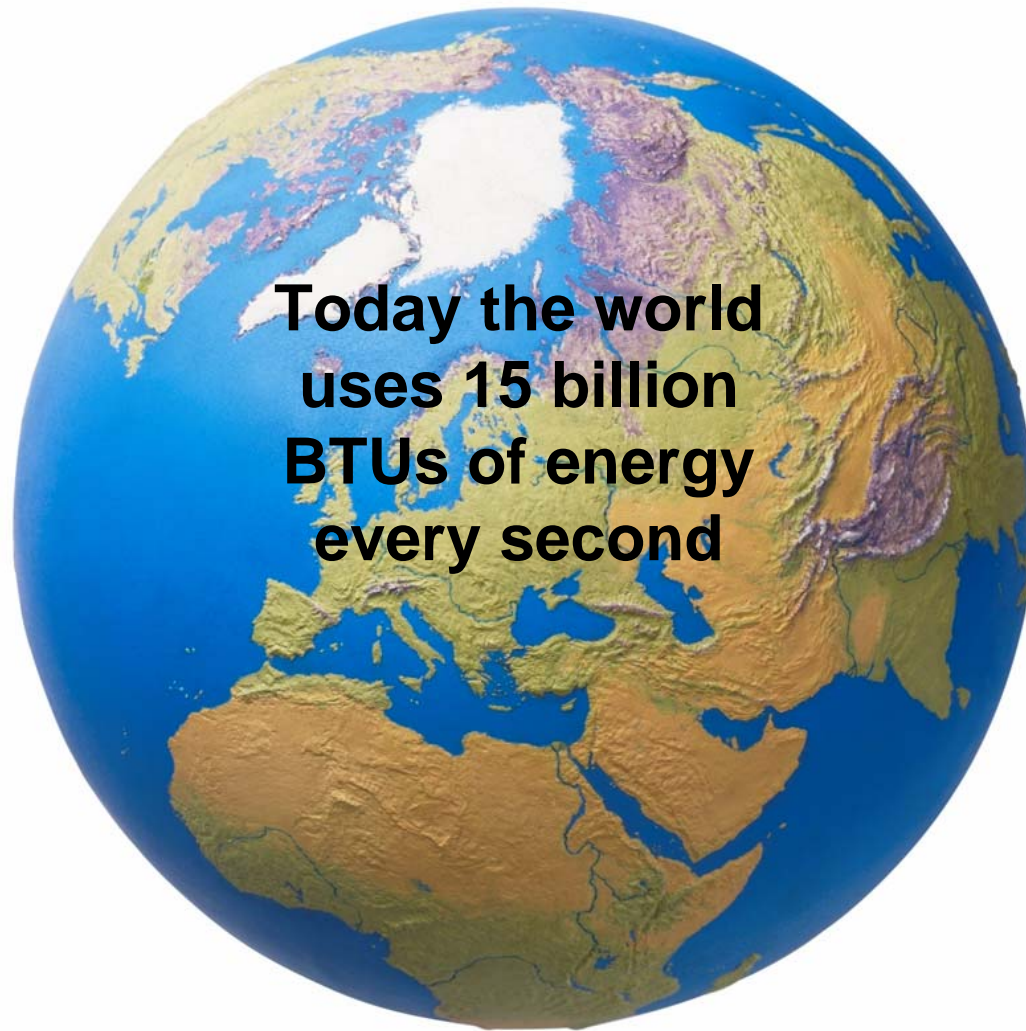
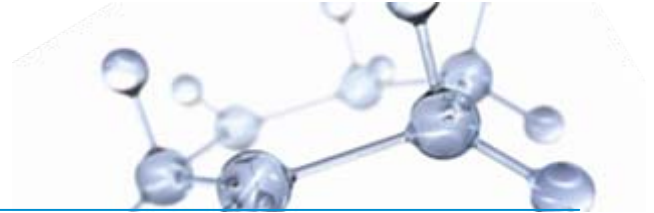
Drives 500,000 cars using over 500,000 gallons of petroleum every day

OECD population is equivalent to 1,200 such cities today

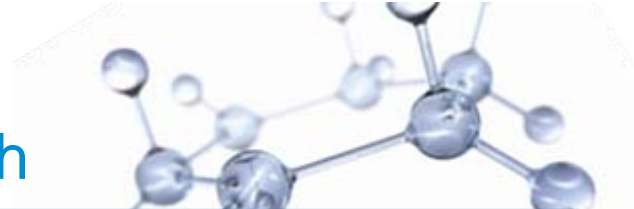
- Growing to almost 1,300 by 2030



Scale of Global Energy Is Enormous



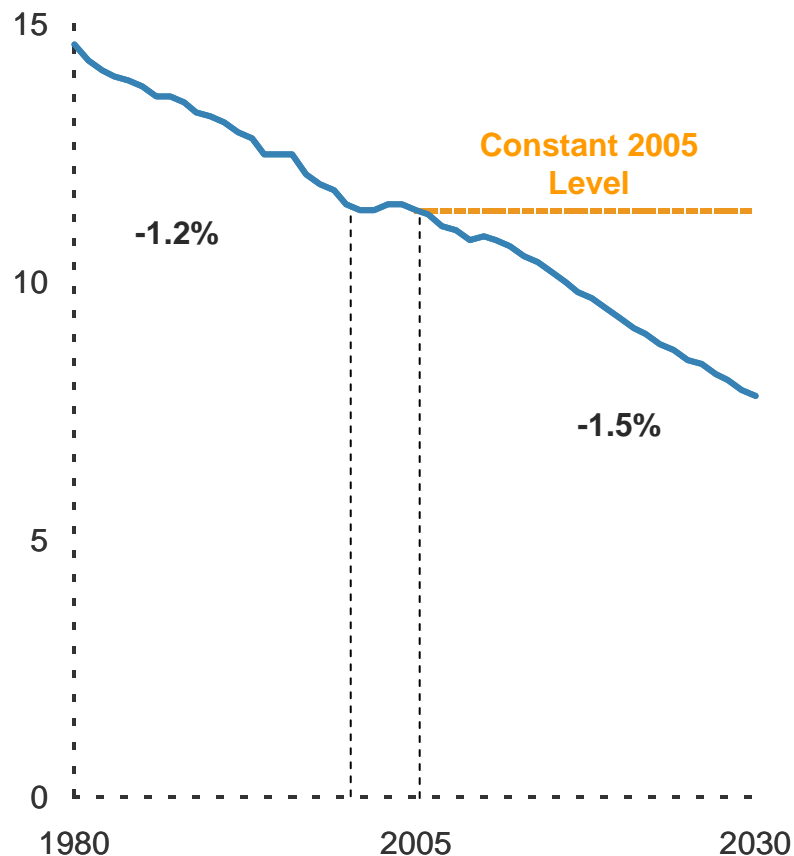
**Today the world
uses 15 billion
BTUs of energy
every second**



Efficiency: Reducing Demand Growth

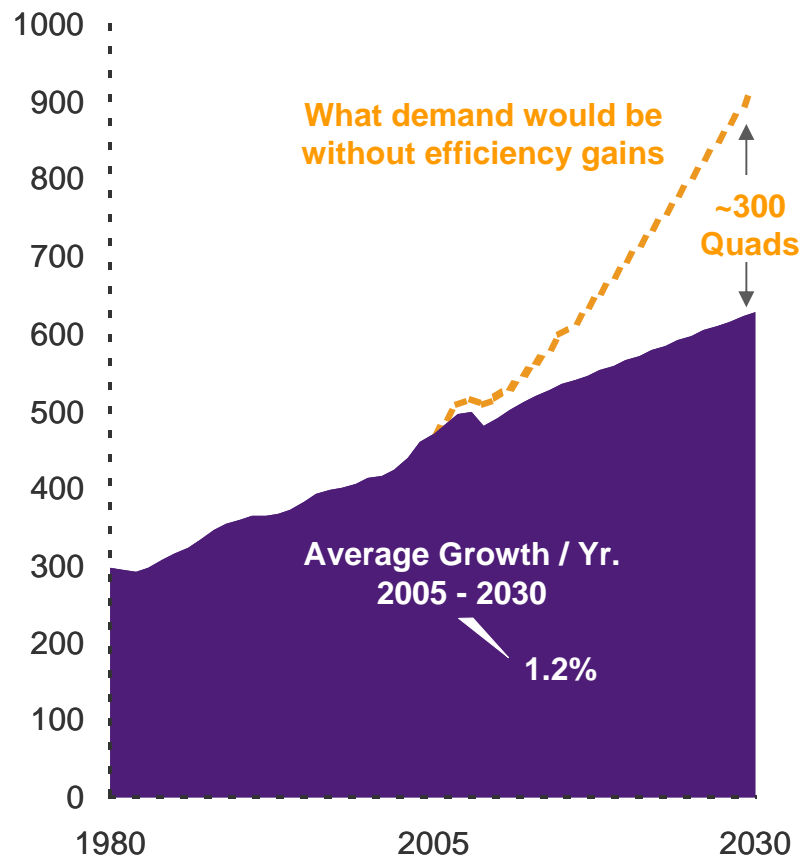
Energy per GDP

MBTU / 2005\$ GDP

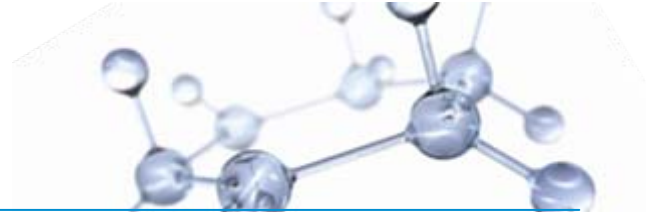


Demand

Quadrillion BTUs

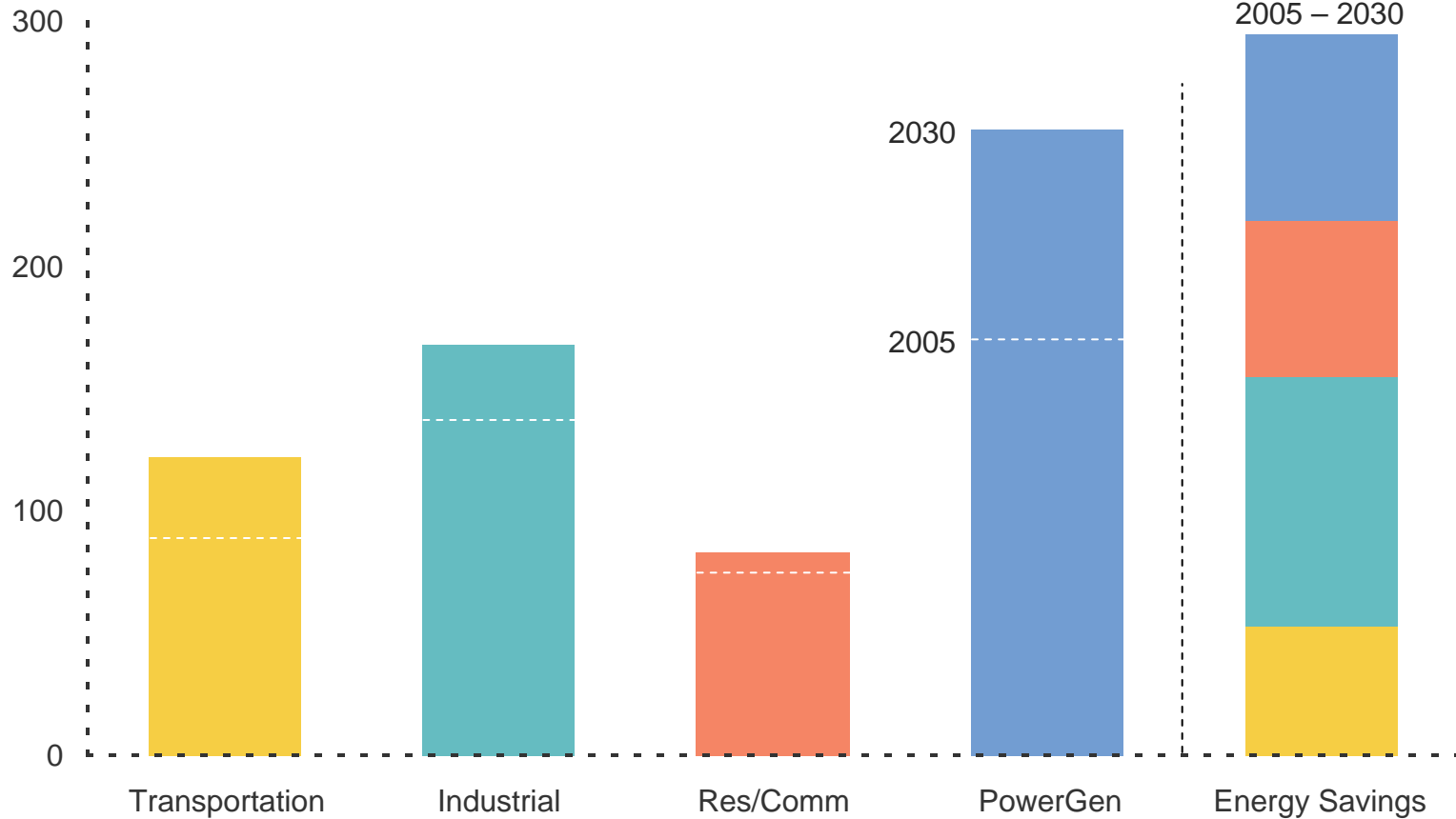


Growing Global Demand

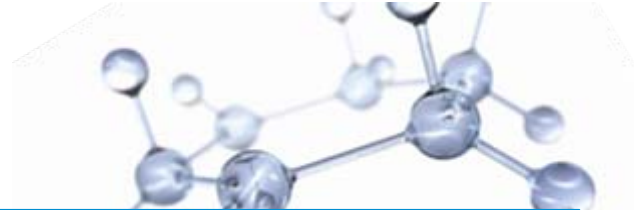


By Sector

Quadrillion BTUs

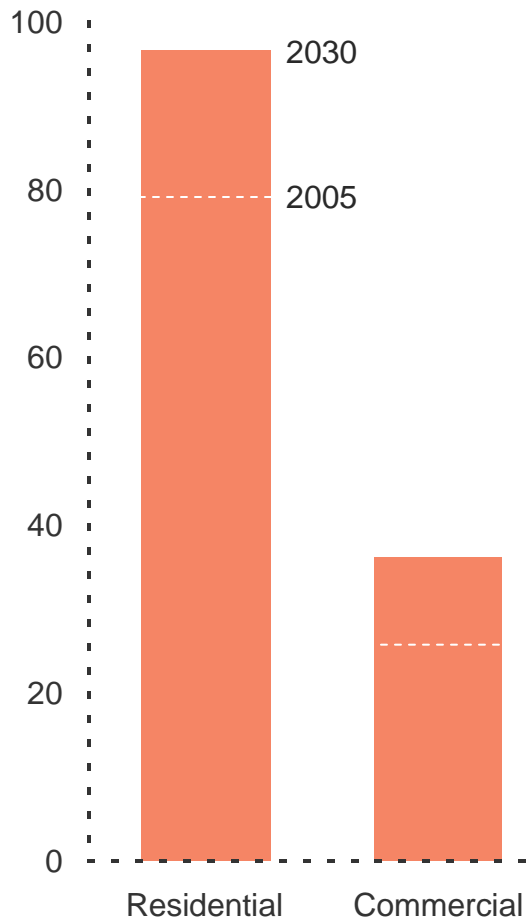


Residential / Commercial Demand



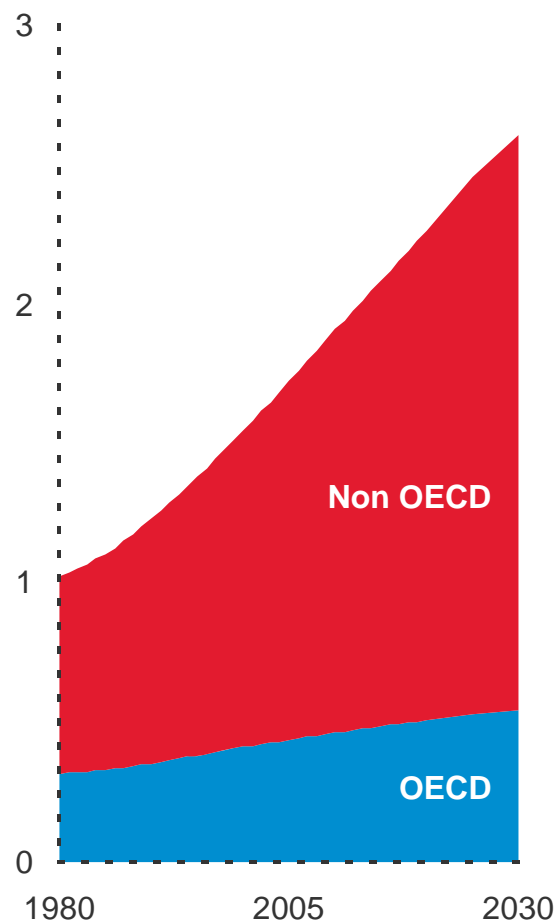
By Sector

Quadrillion BTUs



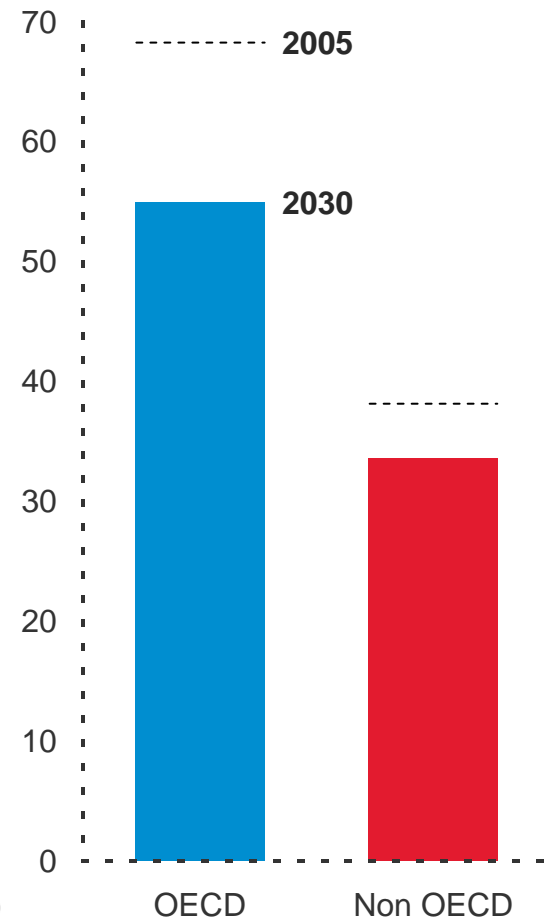
Residential

Billion Households

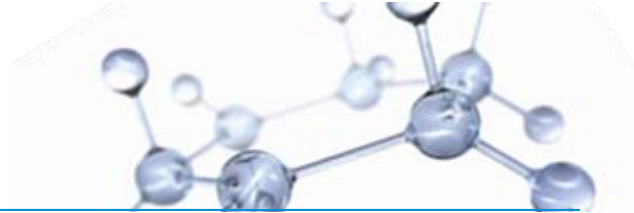


Residential Energy Use

MBTU / Household

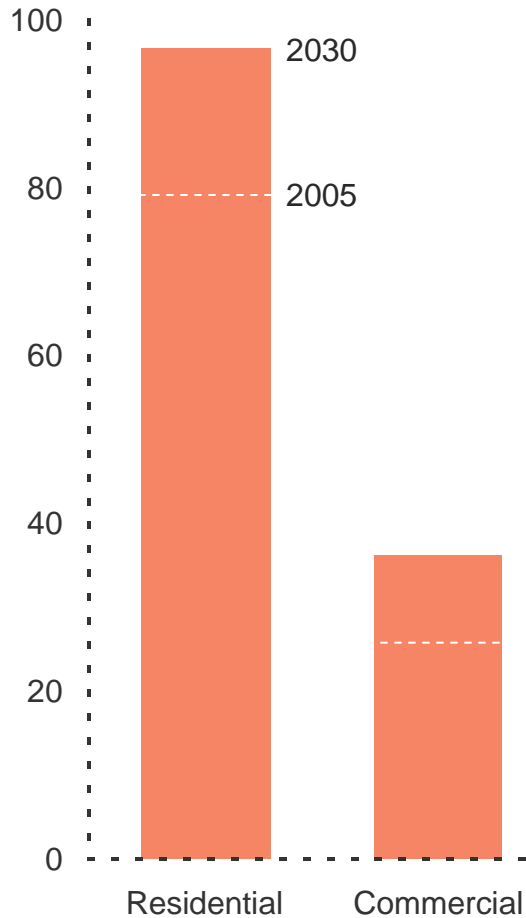


Residential / Commercial Demand



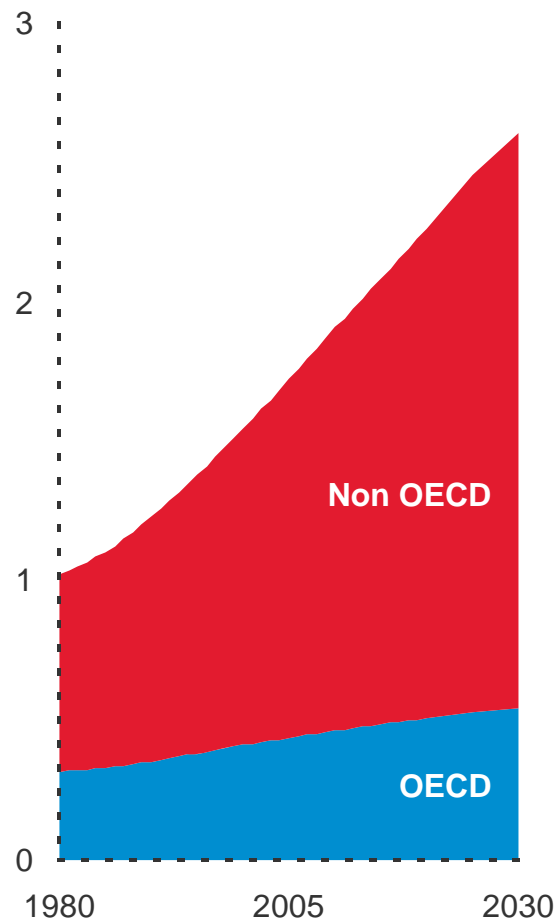
By Sector

Quadrillion BTUs



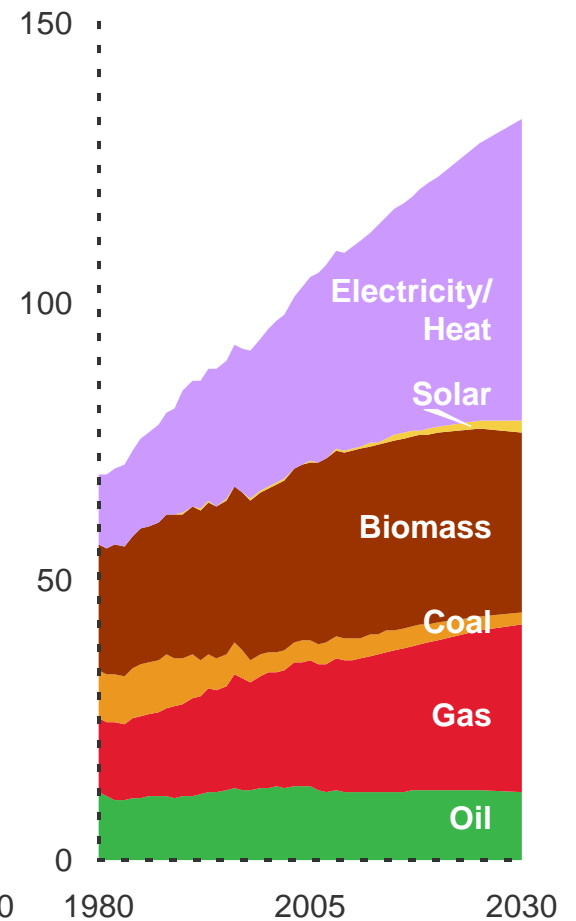
Residential

Billion Households

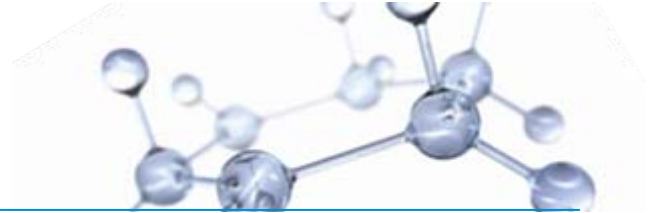


Global Demand

Quadrillion BTUs

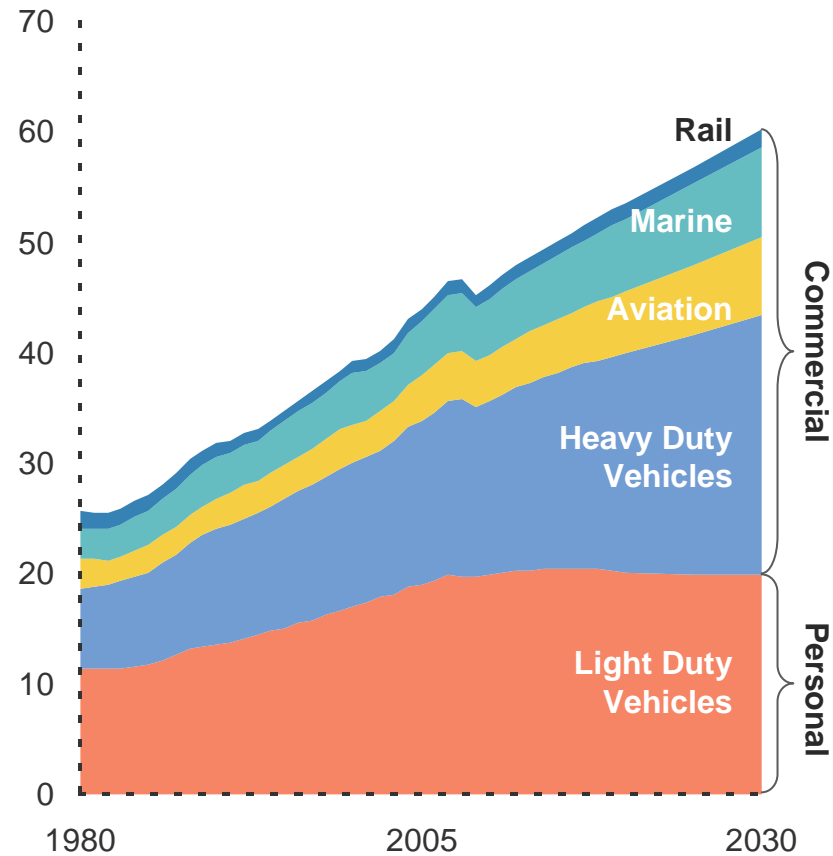


Global Transportation Demand



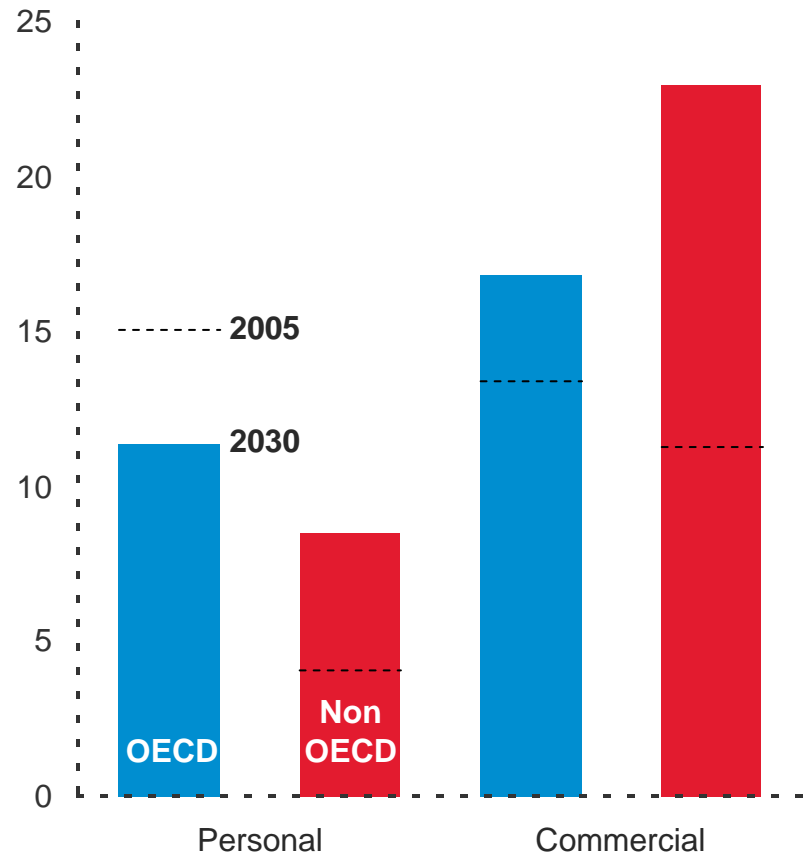
By Sector

MBDOE

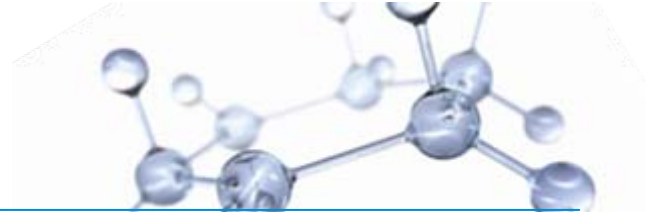


Personal vs. Commercial

MBDOE

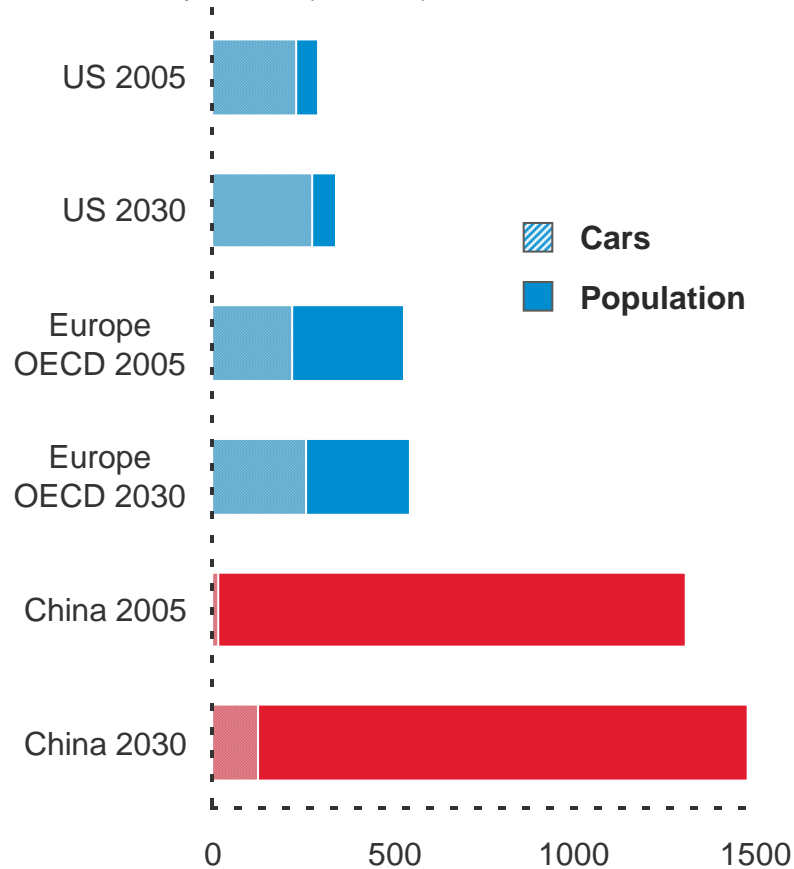


Personal Vehicle Fleet is Growing



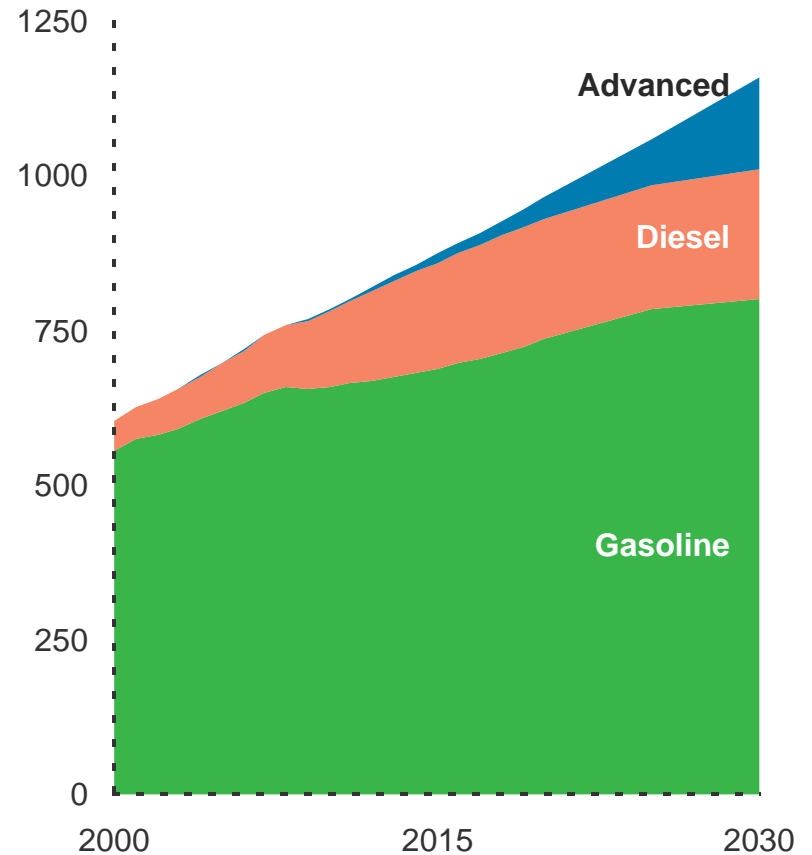
Vehicle Penetration

Cars and Population (millions)

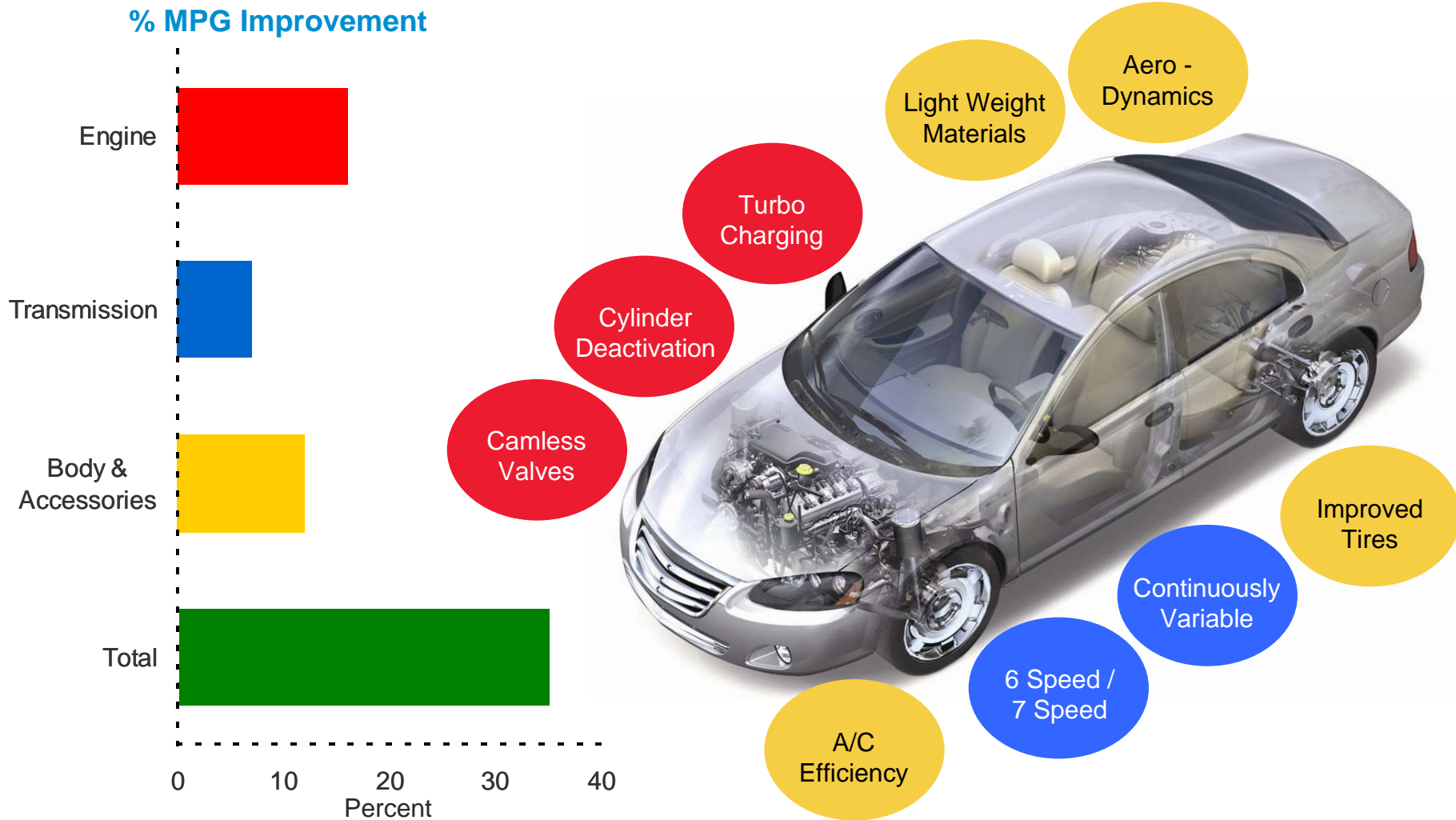
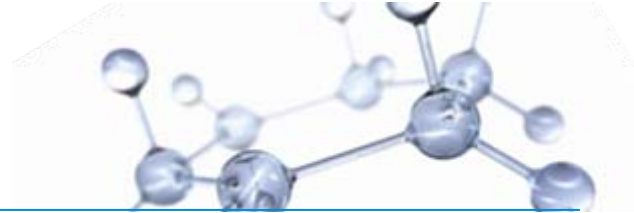


Fleet by Car Type

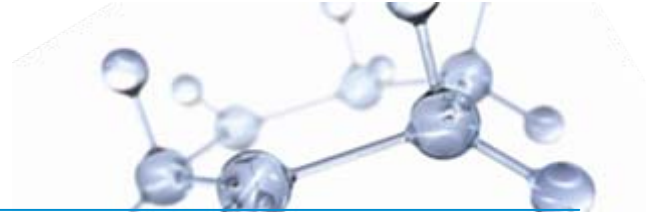
Million Cars



Improving Today's Vehicle

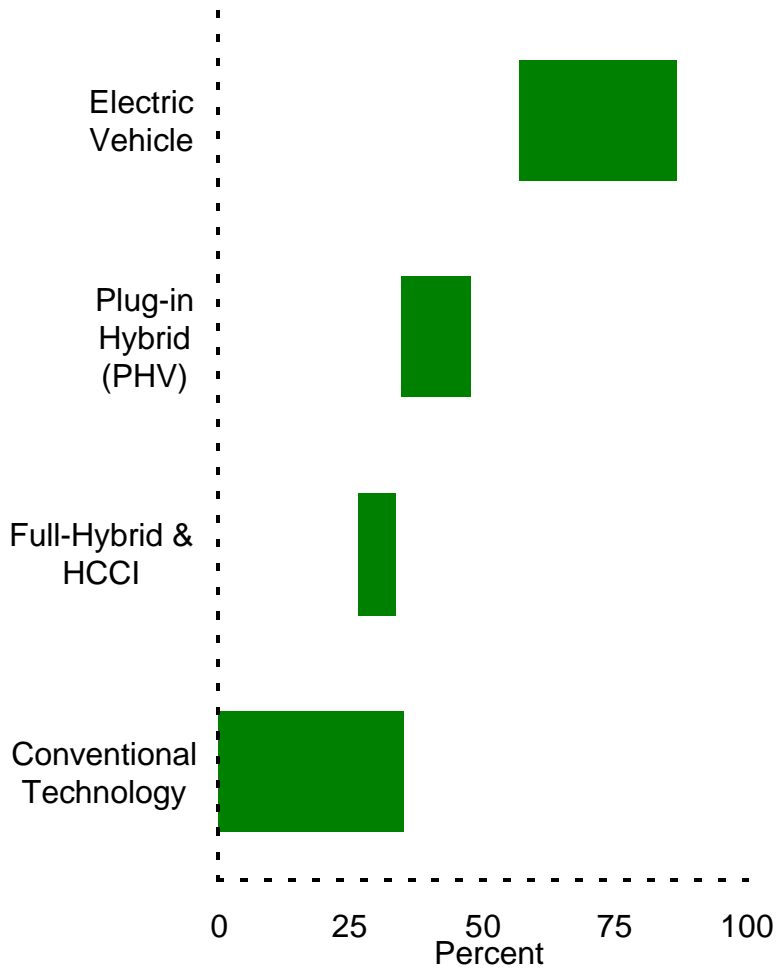


Light Duty Vehicle Technology

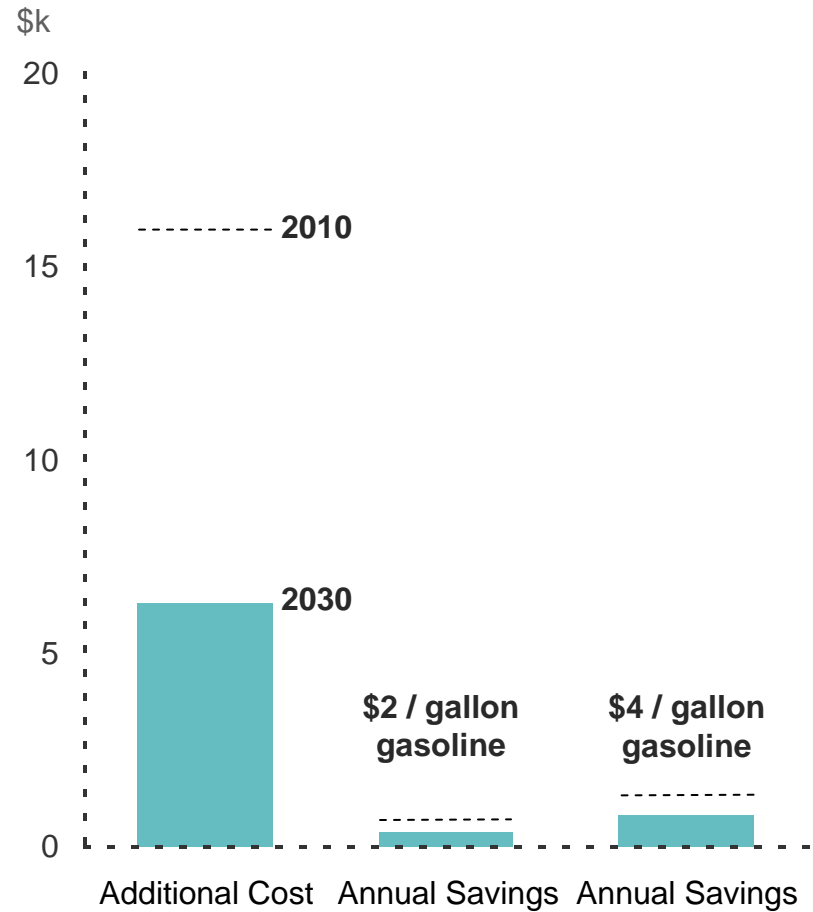


% MPG Improvement

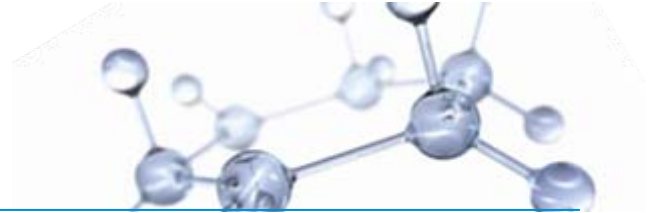
Well to Wheels Gasoline Equiv.



Plug-in Hybrid vs. Conventional Vehicles



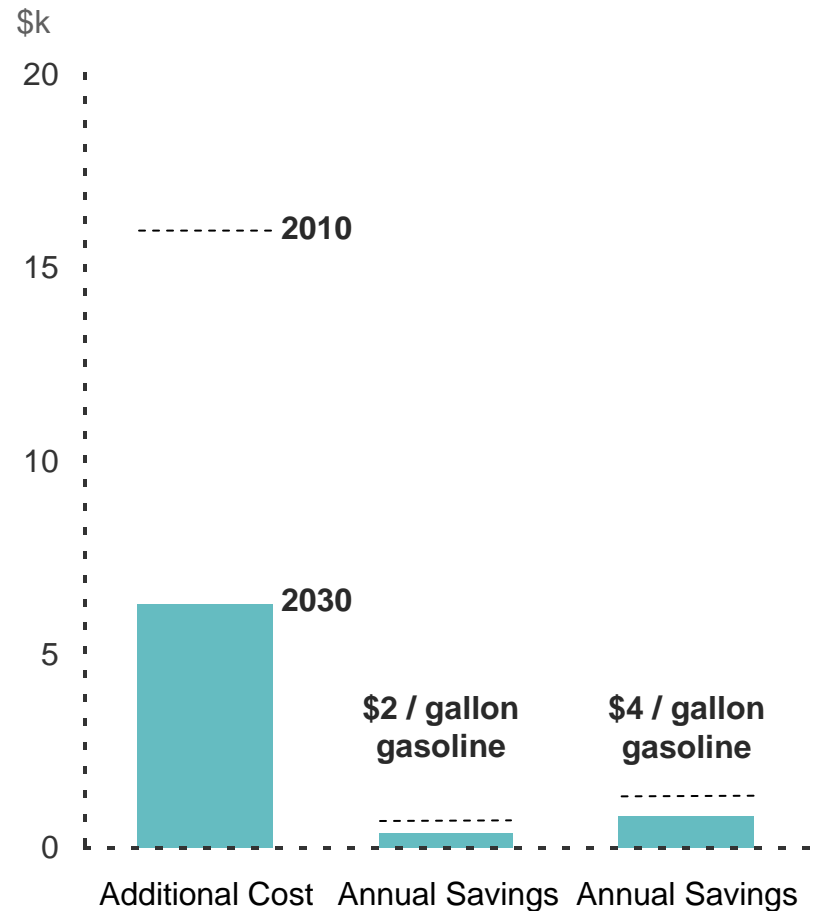
Light Duty Vehicle Technology



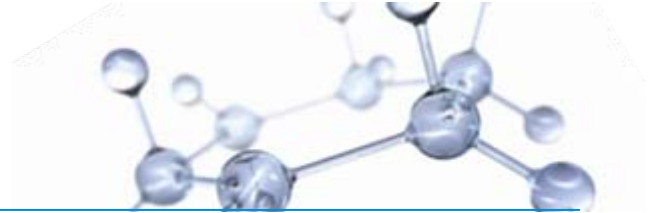
Plug-in Hybrid Assumptions

	<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

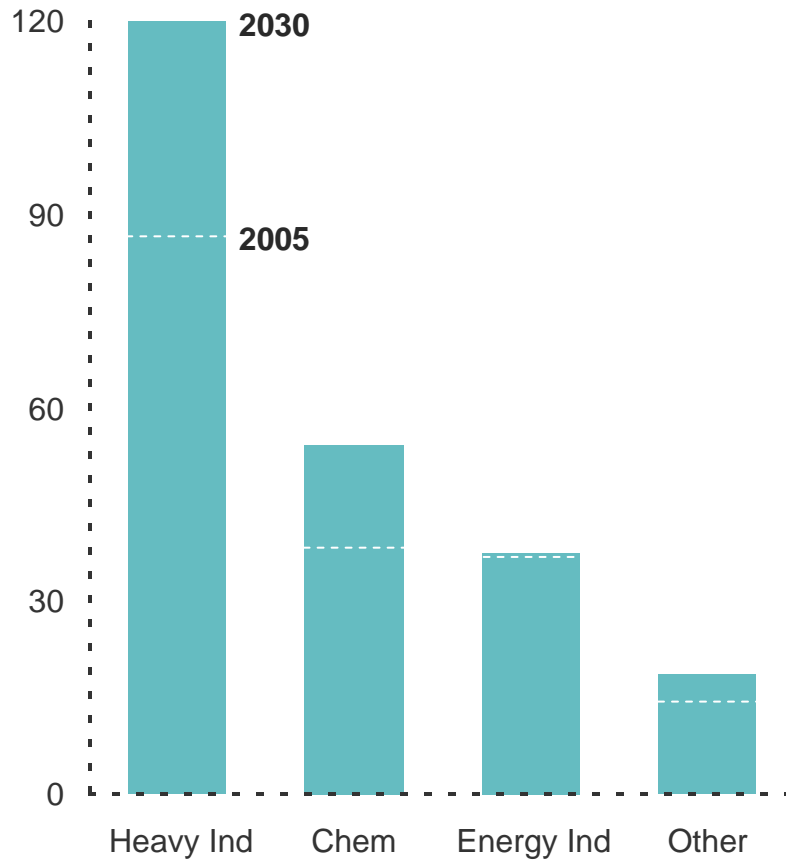


Global Industrial Demand



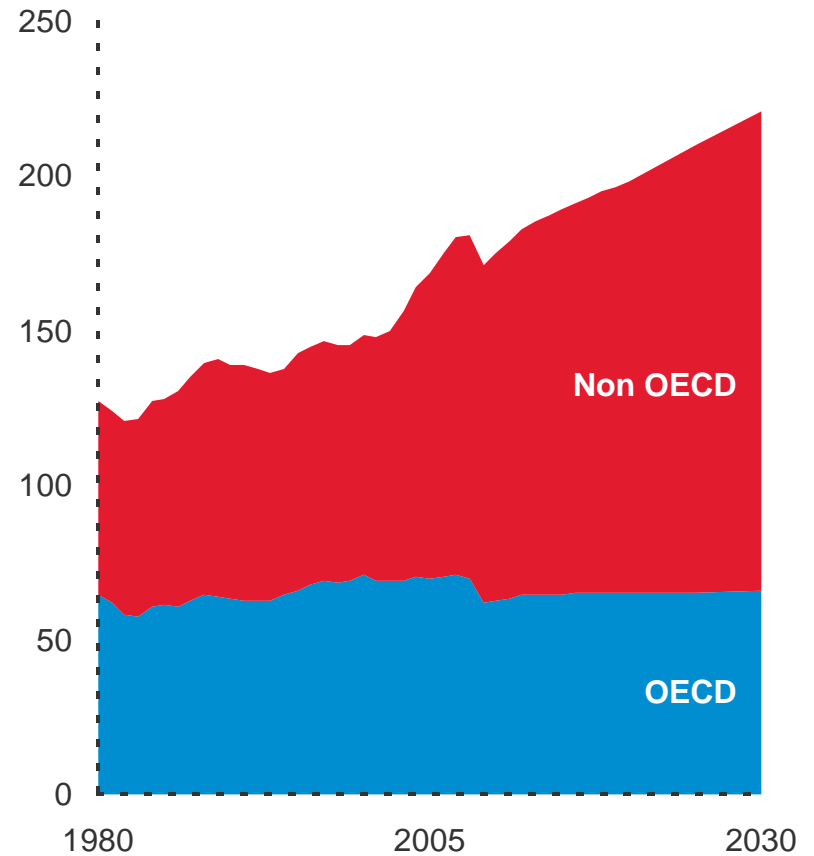
By Sector

Quadrillion BTUs

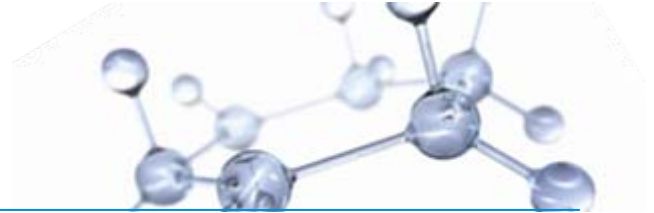


By Region

Quadrillion BTUs

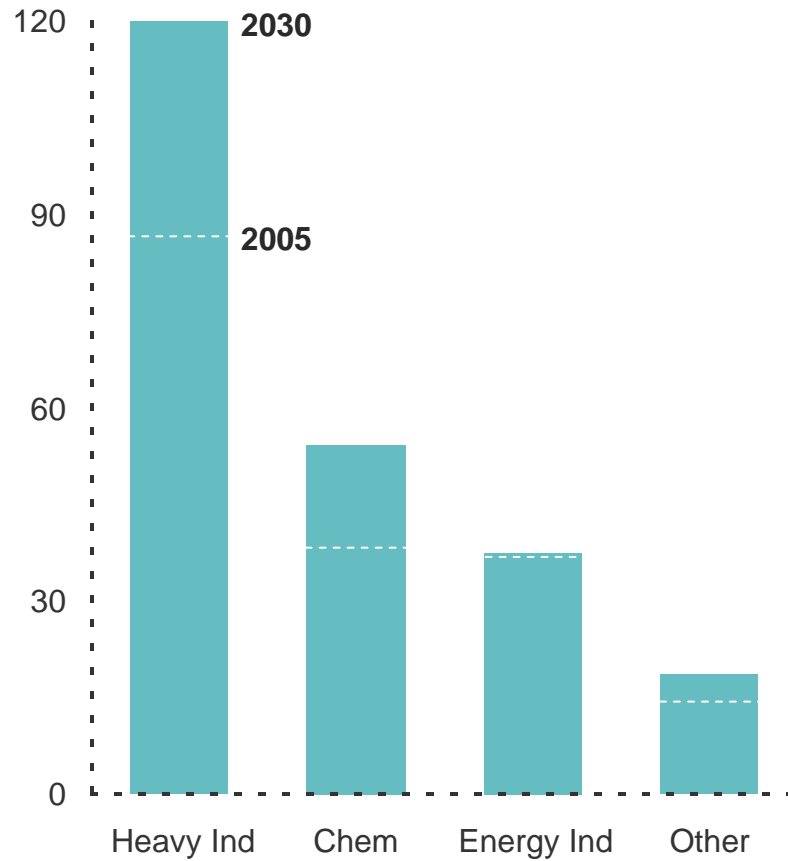


Global Industrial Demand



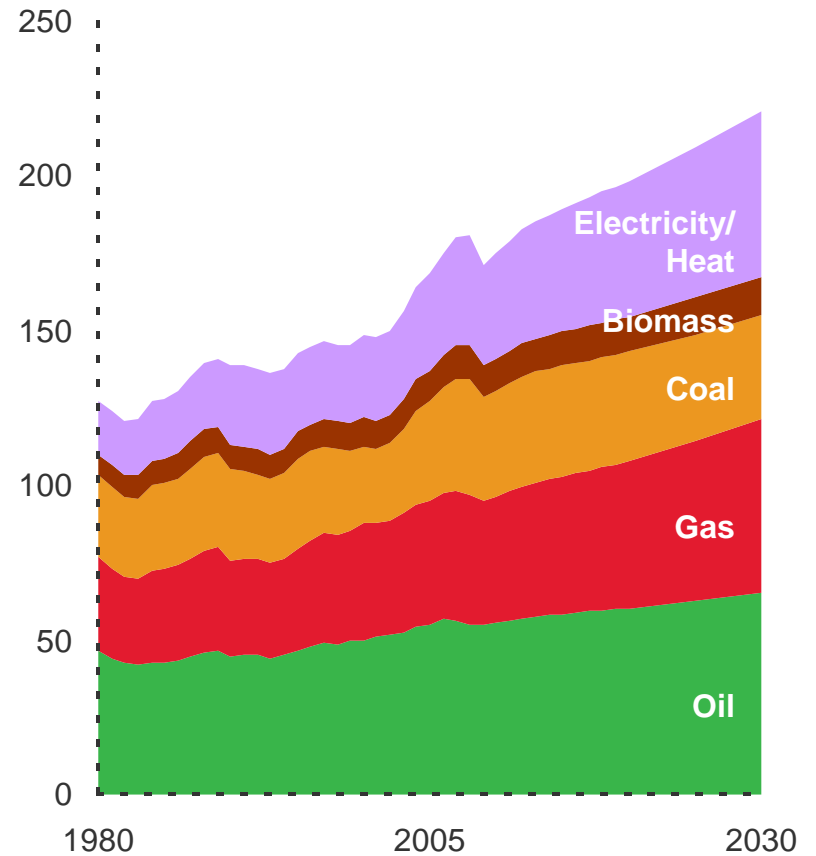
By Sector

Quadrillion BTUs

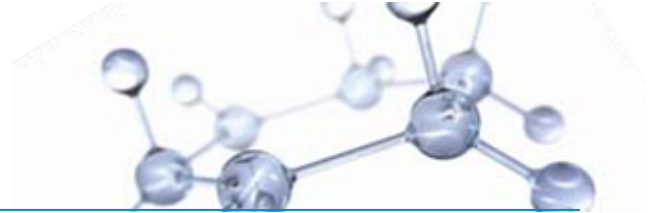


By Fuel

Quadrillion BTUs

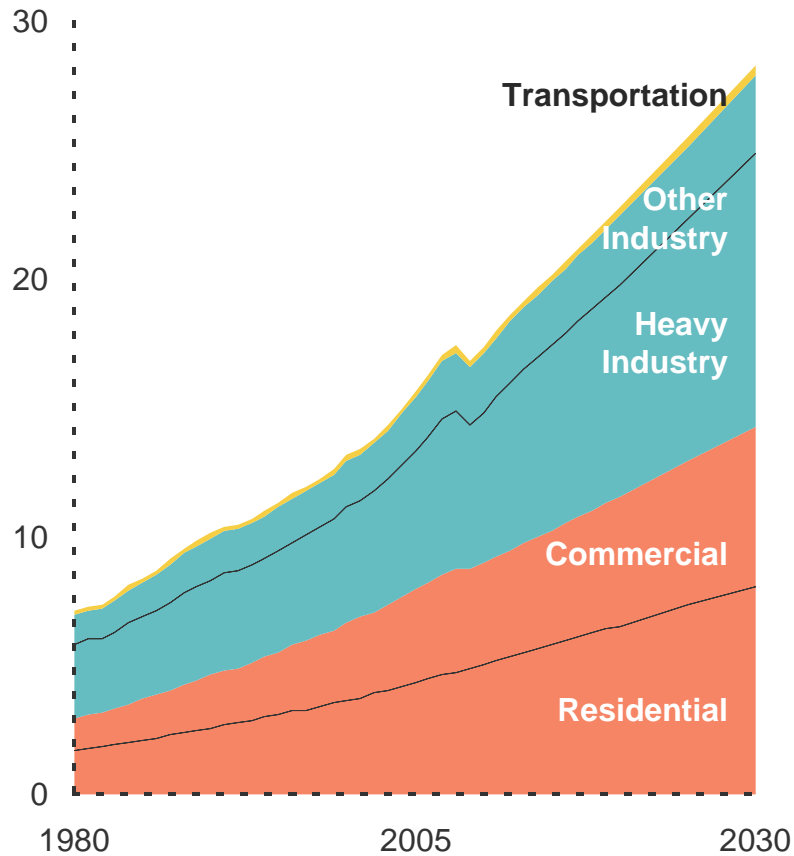


Electricity Use is Growing Fast



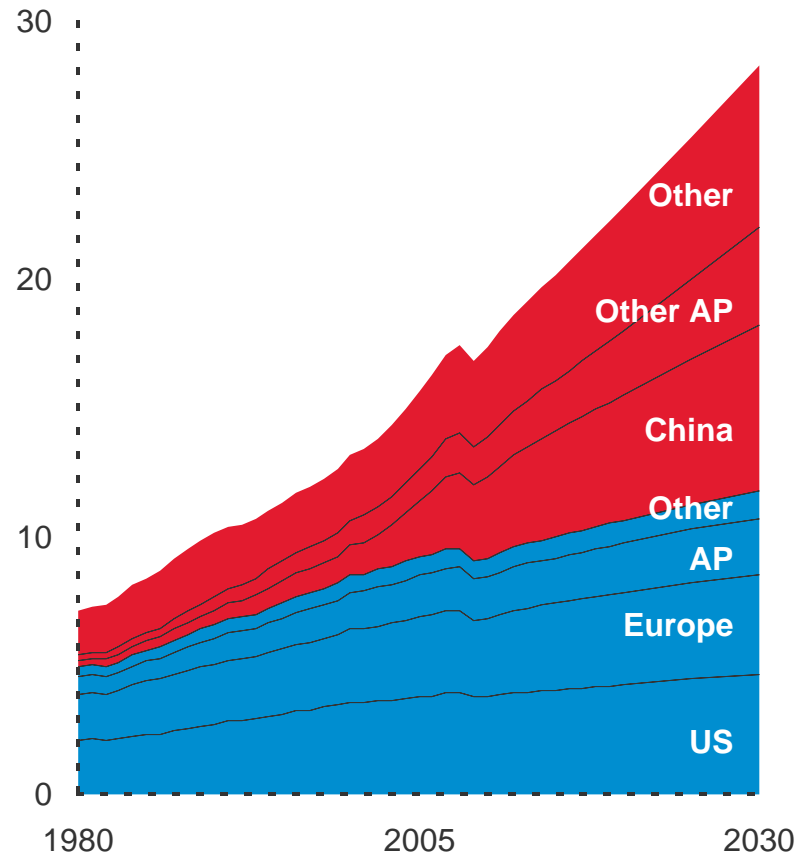
By Sector

k TWhr

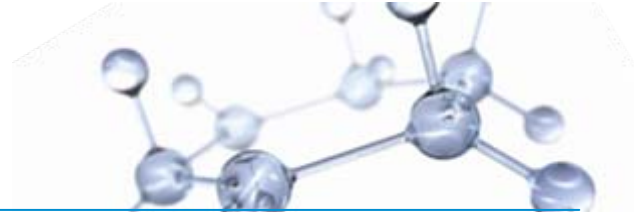


By Region

k TWhr

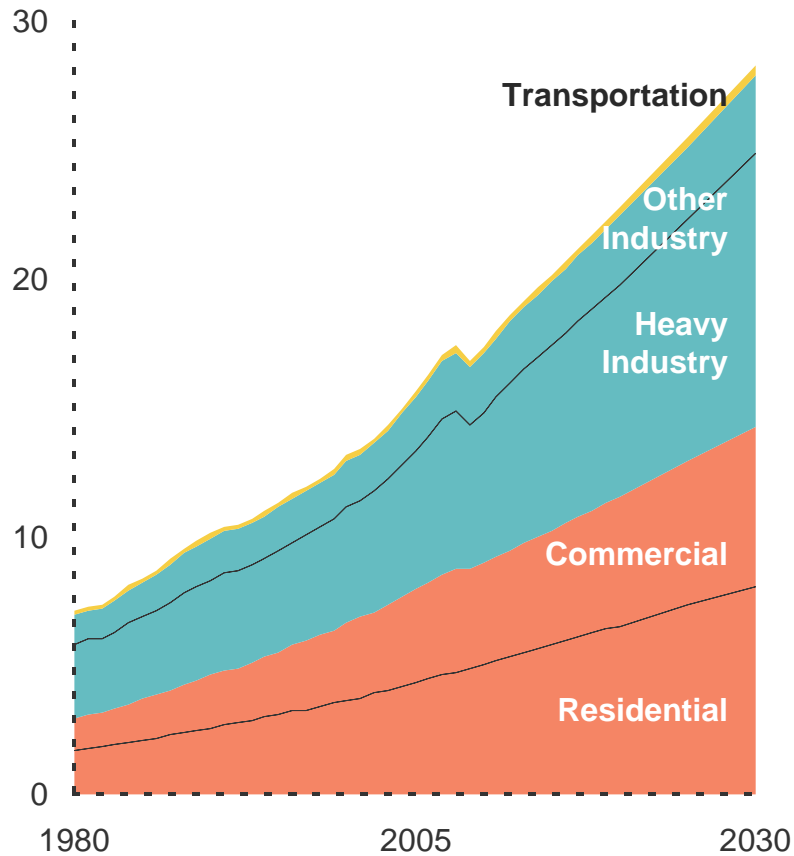


Electricity Use is Growing Fast



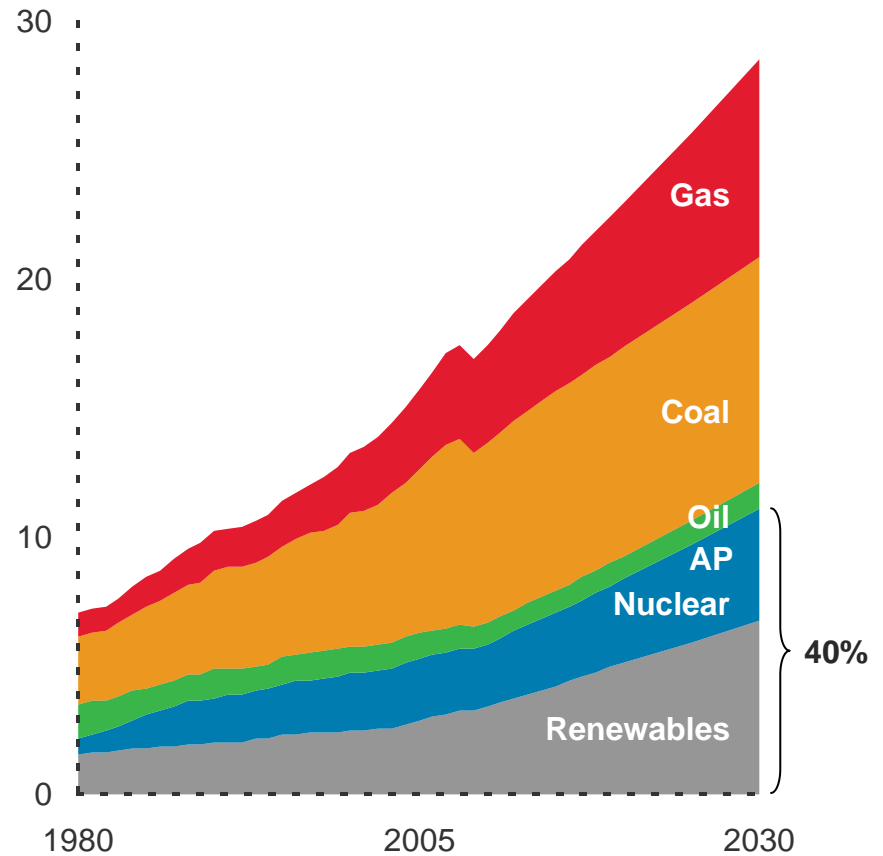
By Sector

k TWhr

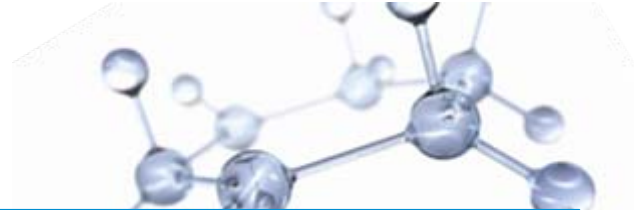


By Generation

k TWhr

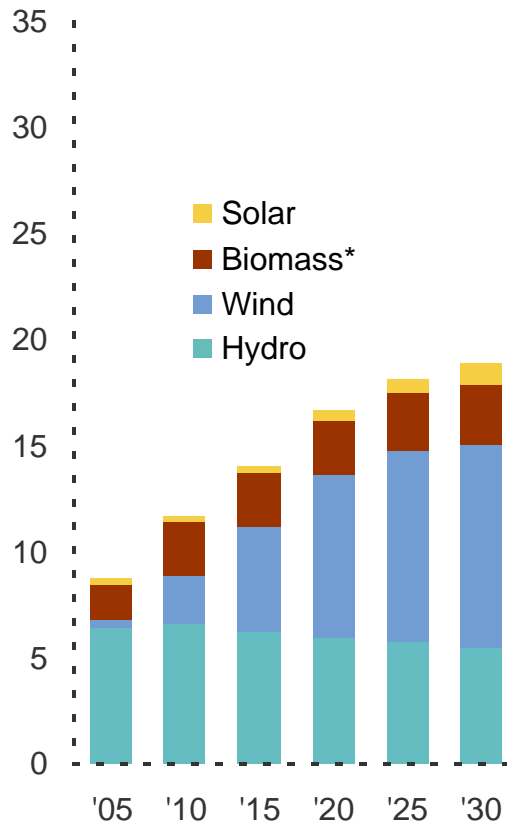


Renewables by Region



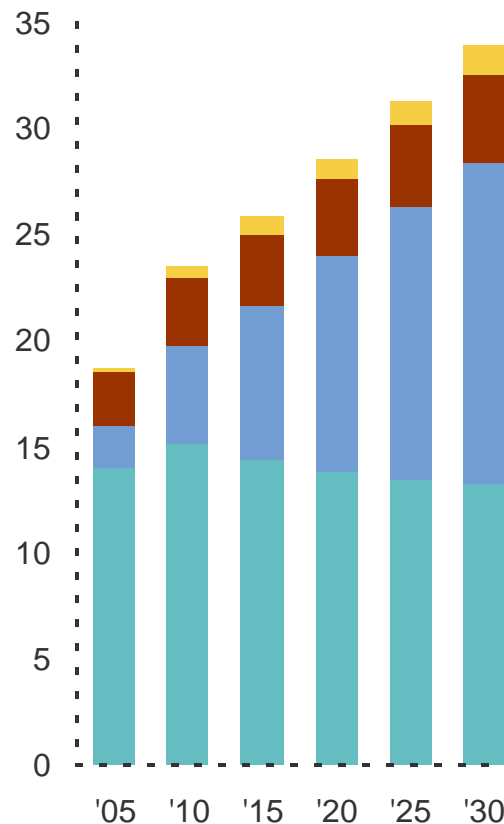
United States

Percent of TWhr



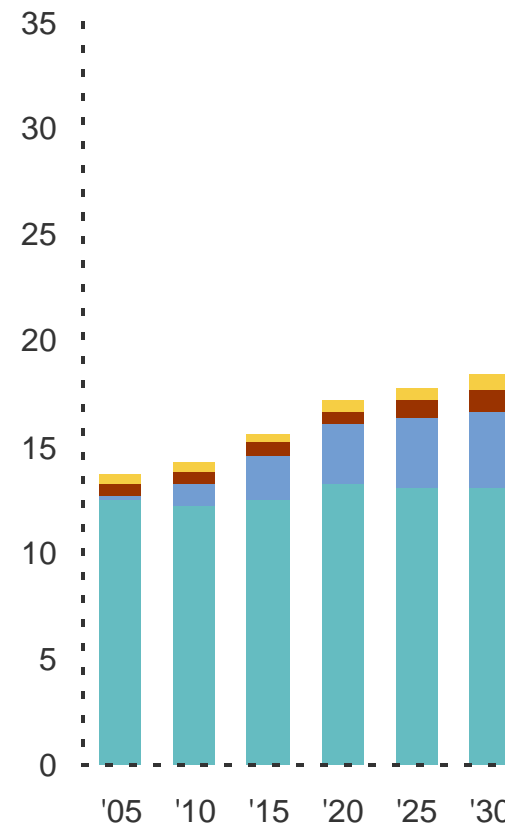
Europe OECD

Percent of TWhr



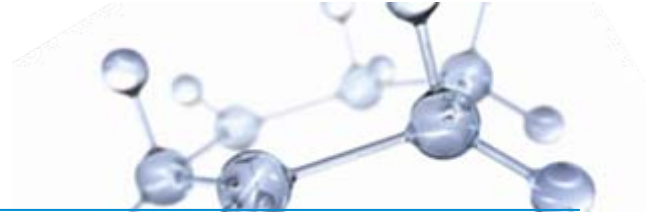
Asia Pacific

Percent of TWhr



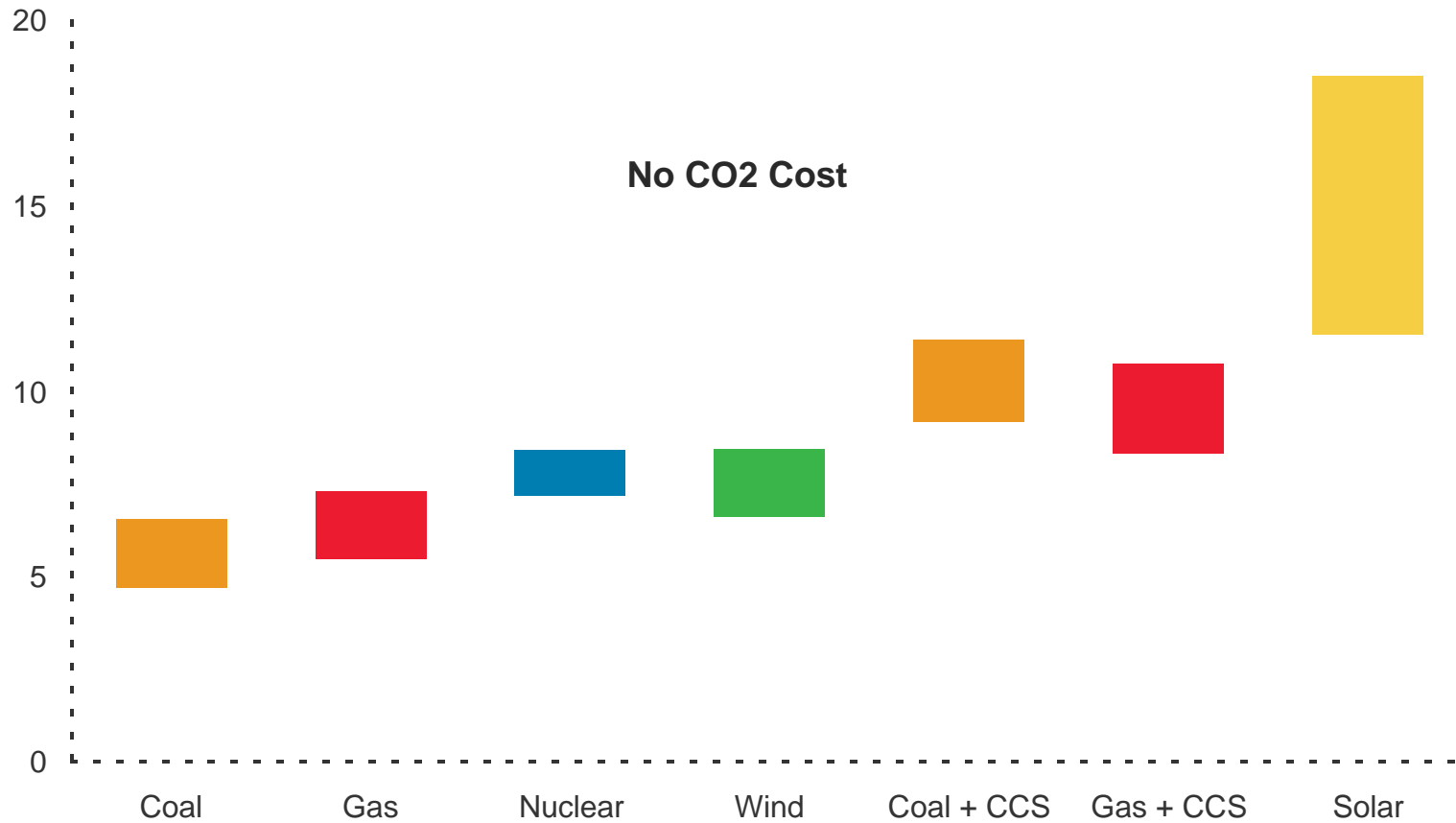
*Biomass includes Municipal Solid Waste

Electricity Generation Cost

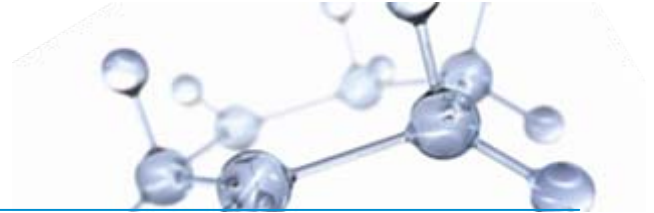


US Baseload, Startup 2025

2009 Cents/kWhr

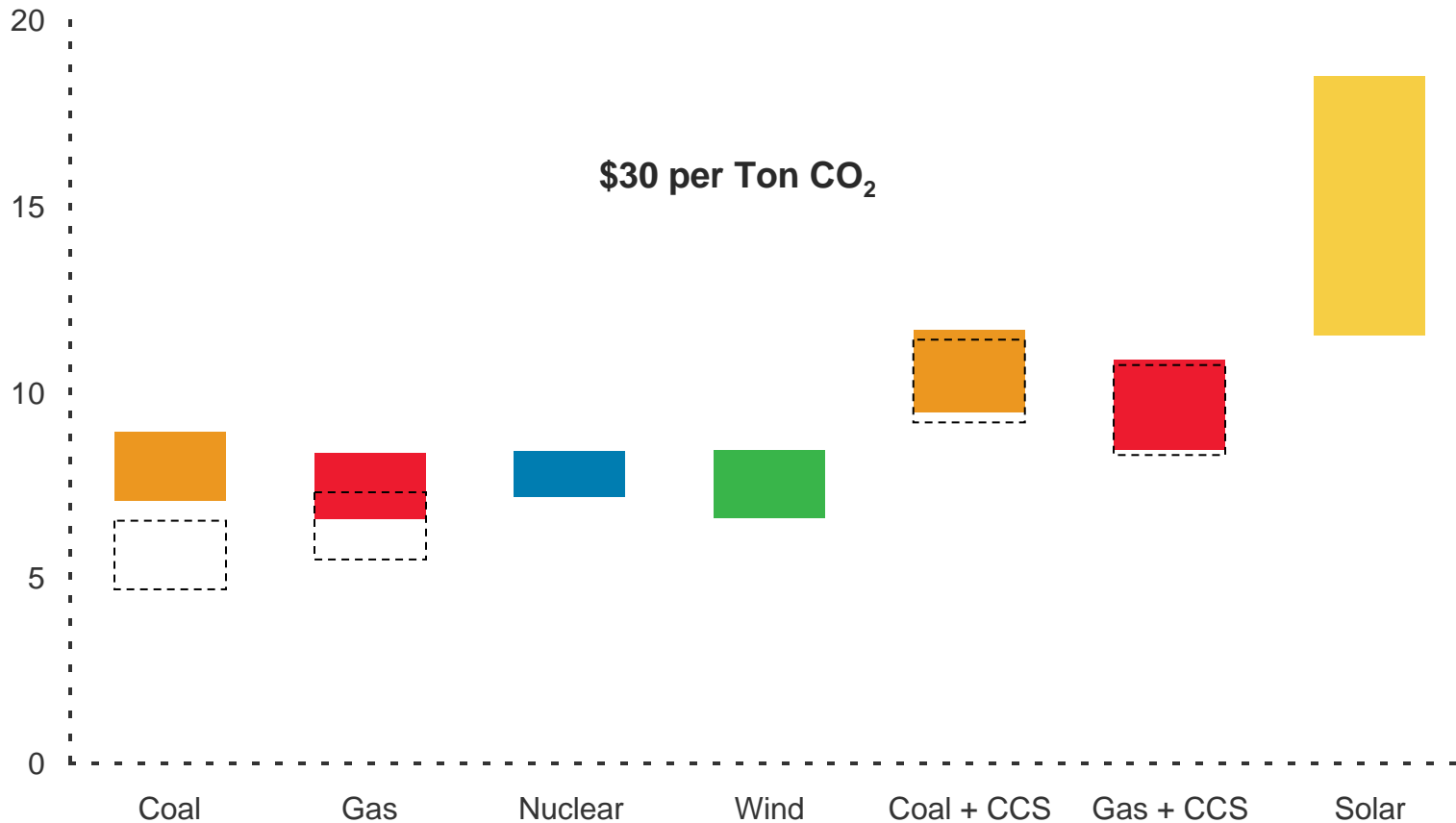


Electricity Generation Cost

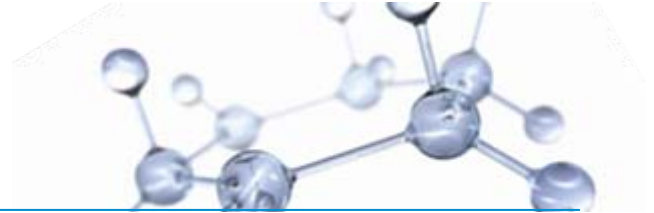


US Baseload, Startup 2025

2009 Cents/kWhr

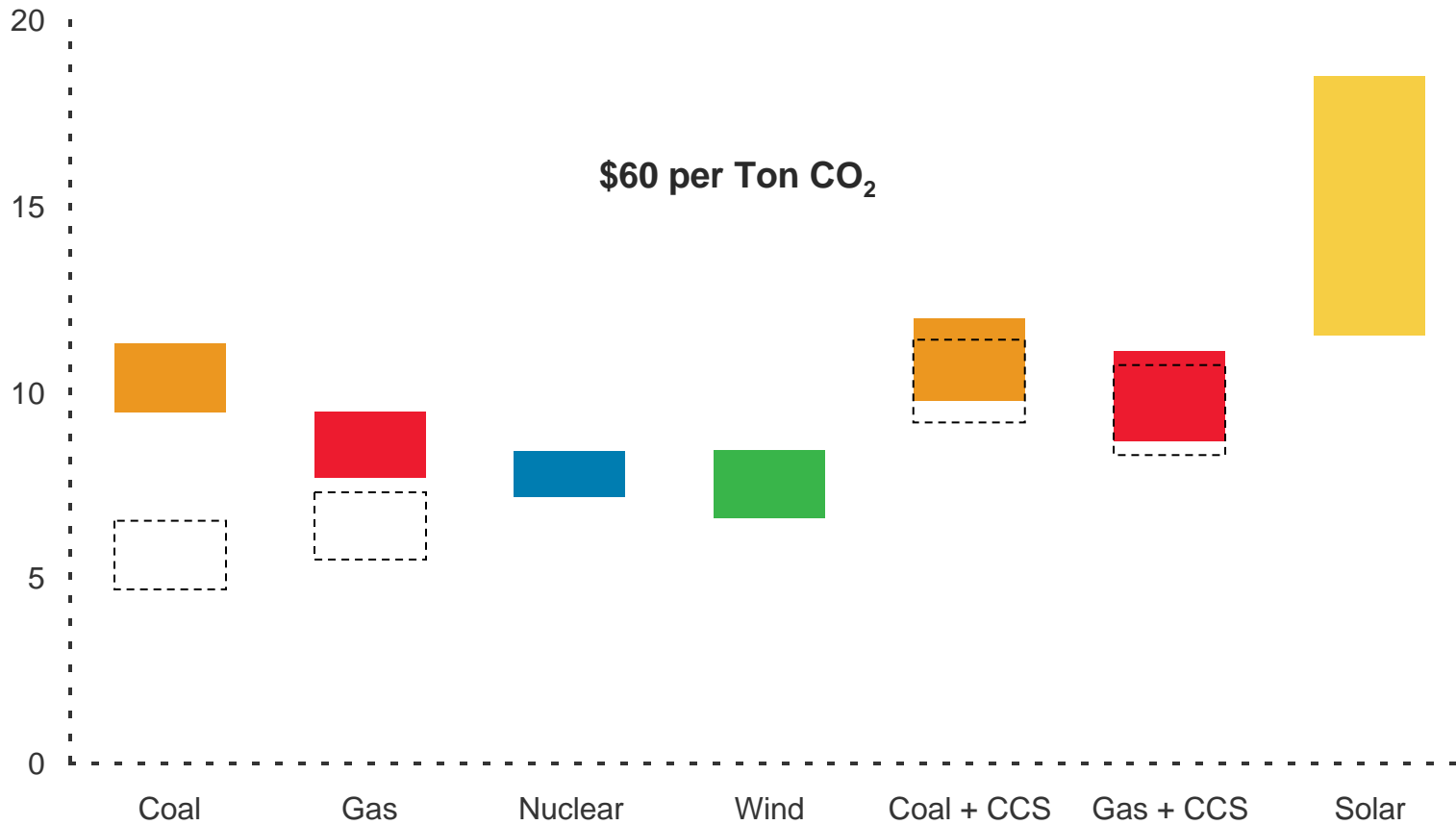


Electricity Generation Cost

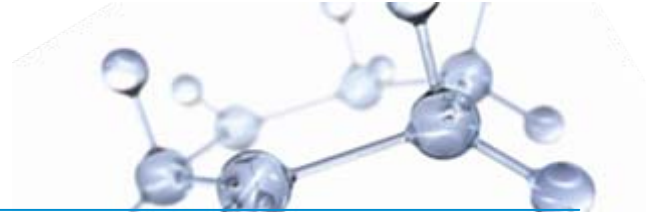


US Baseload, Startup 2025

2009 Cents/kWhr

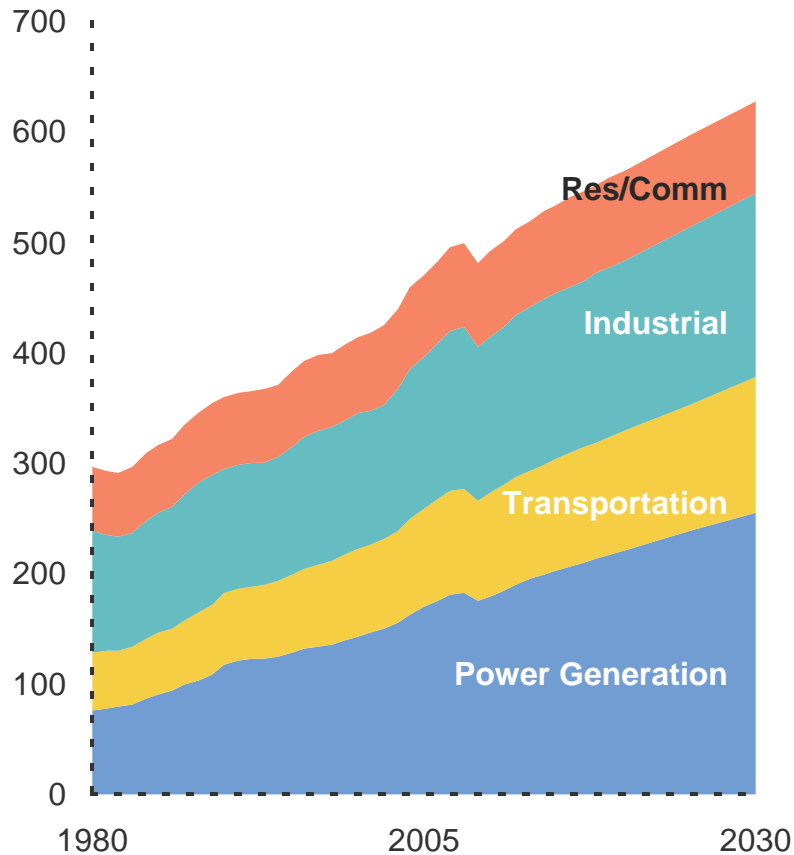


Global Energy Demand and Supply



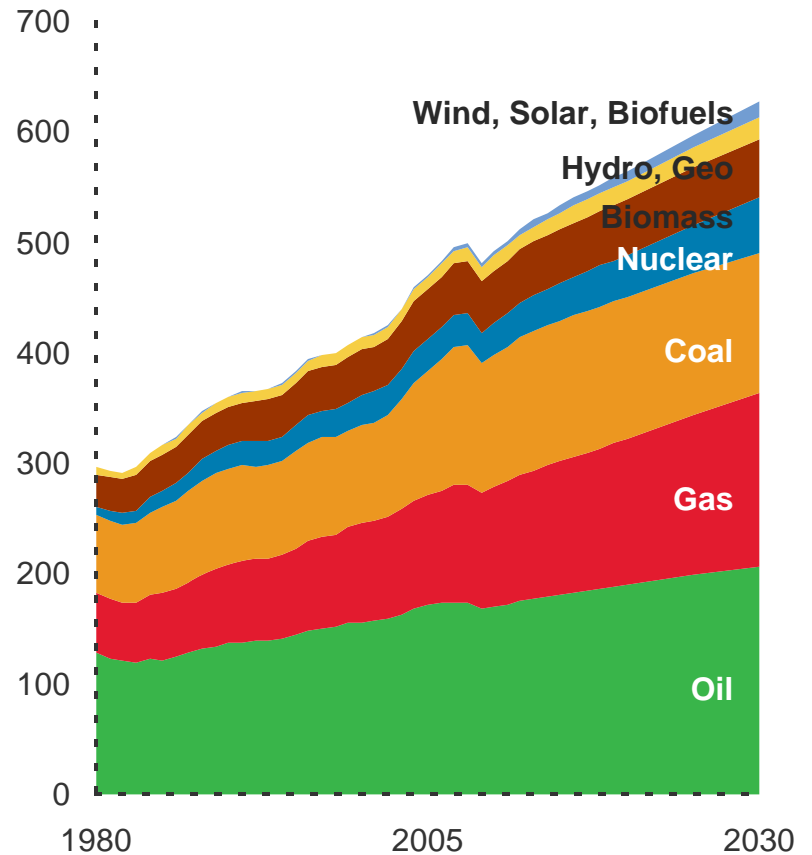
By Sector

Quadrillion BTUs

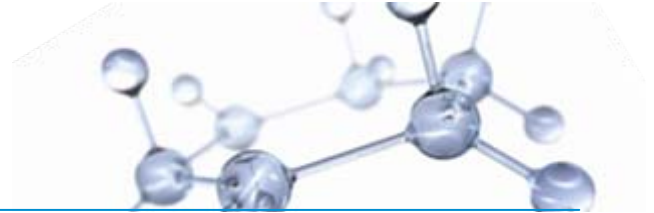


By Fuel

Quadrillion BTUs

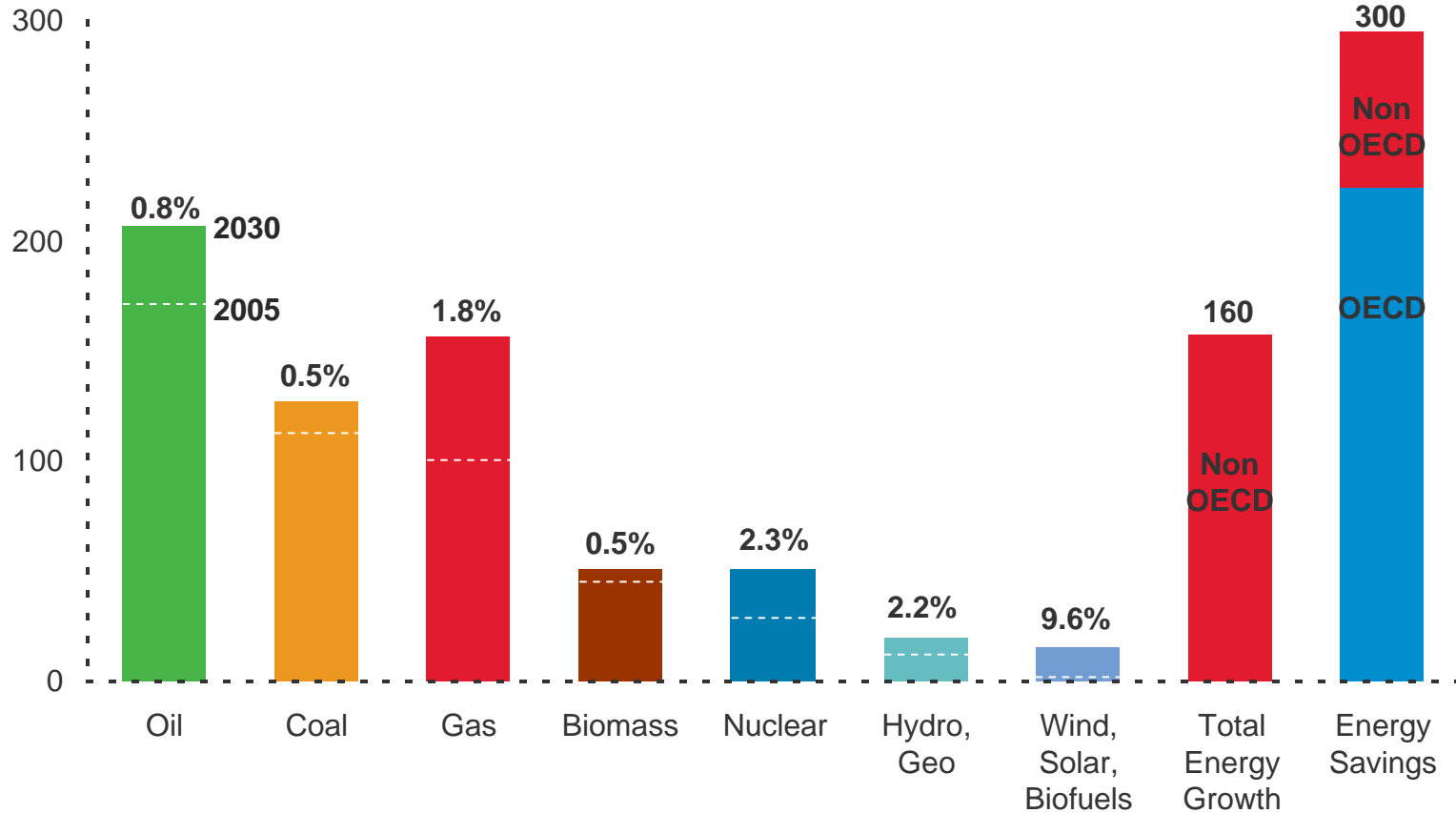


Global Energy Demand and Supply

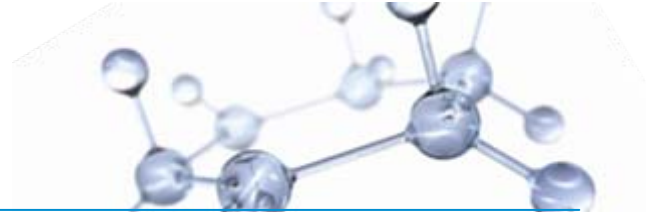


Demand and Supply

Quadrillion BTUs

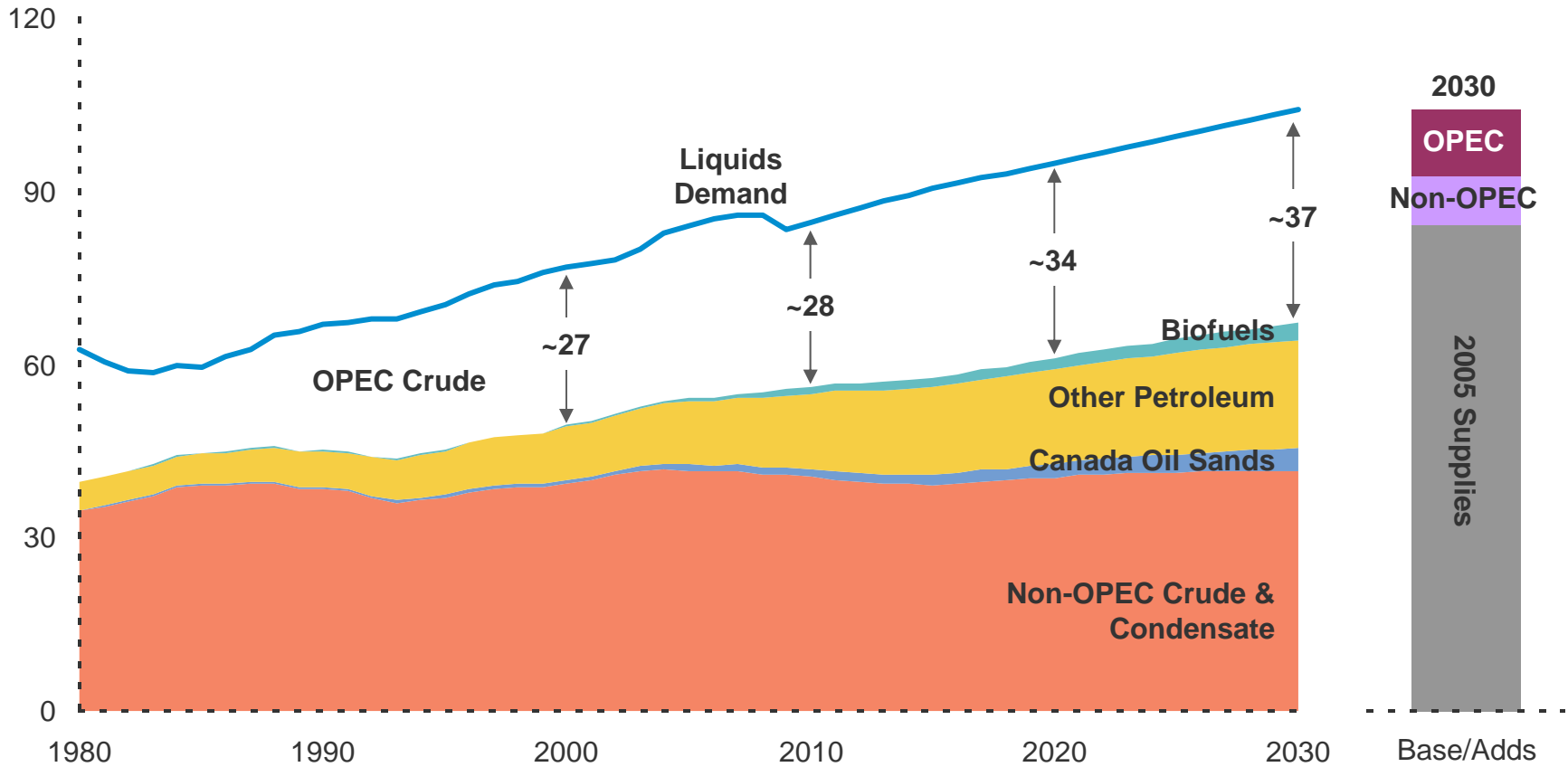


Global Liquids Supply Grows

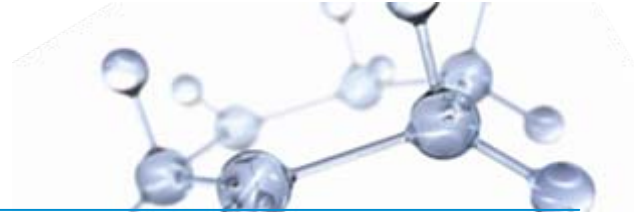


Global Liquids Supply and Demand

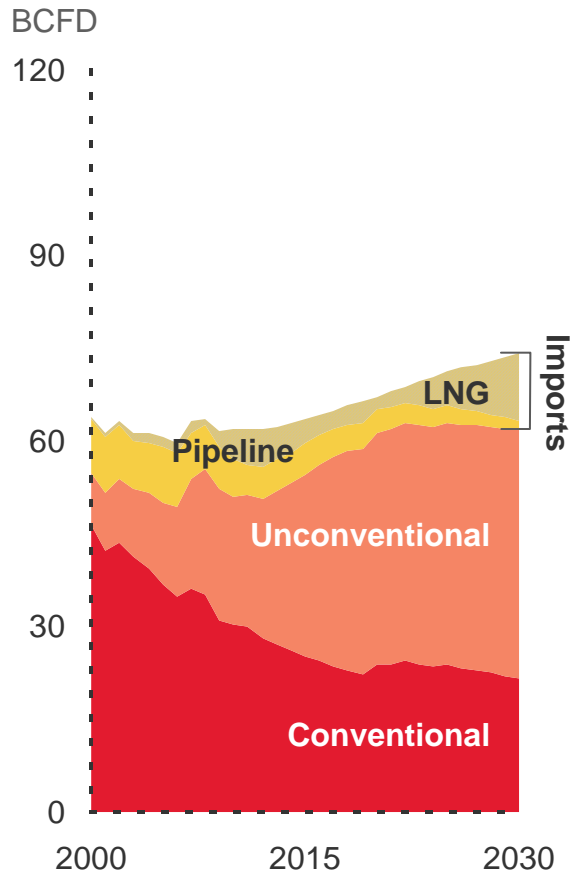
MBDOE



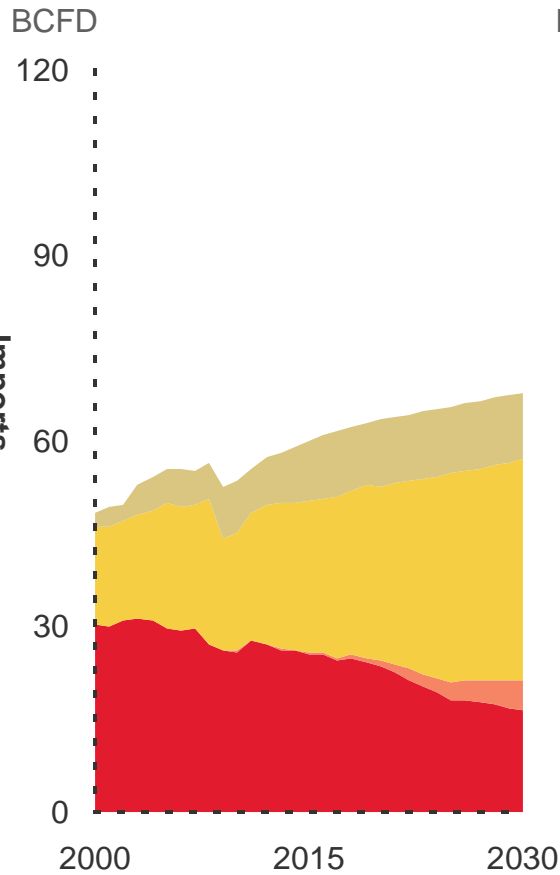
Gas Supply and Demand Balance



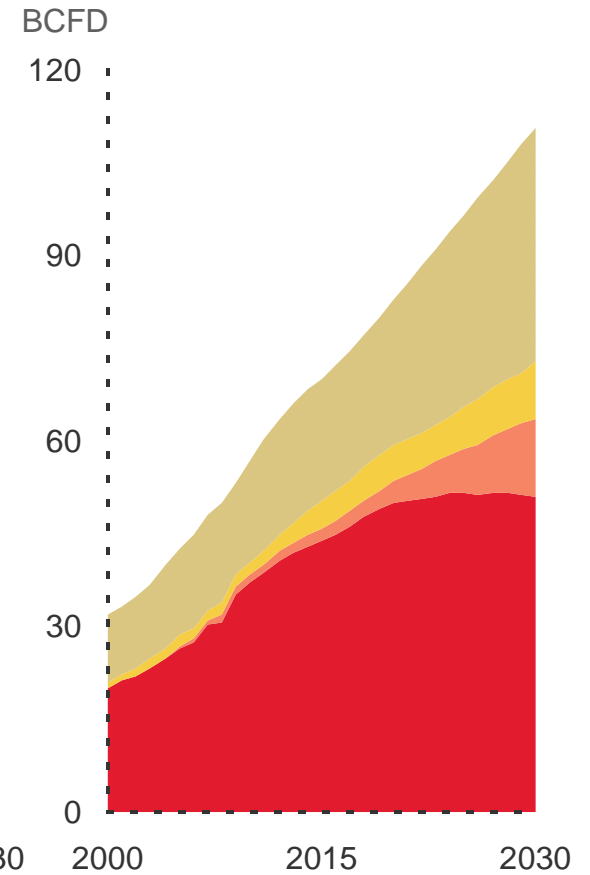
United States



Europe

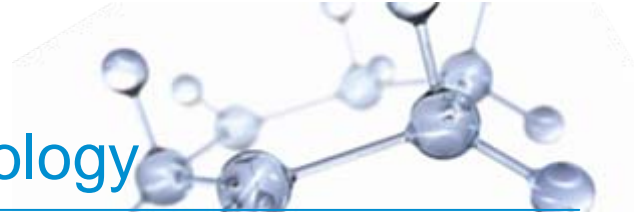


Asia Pacific



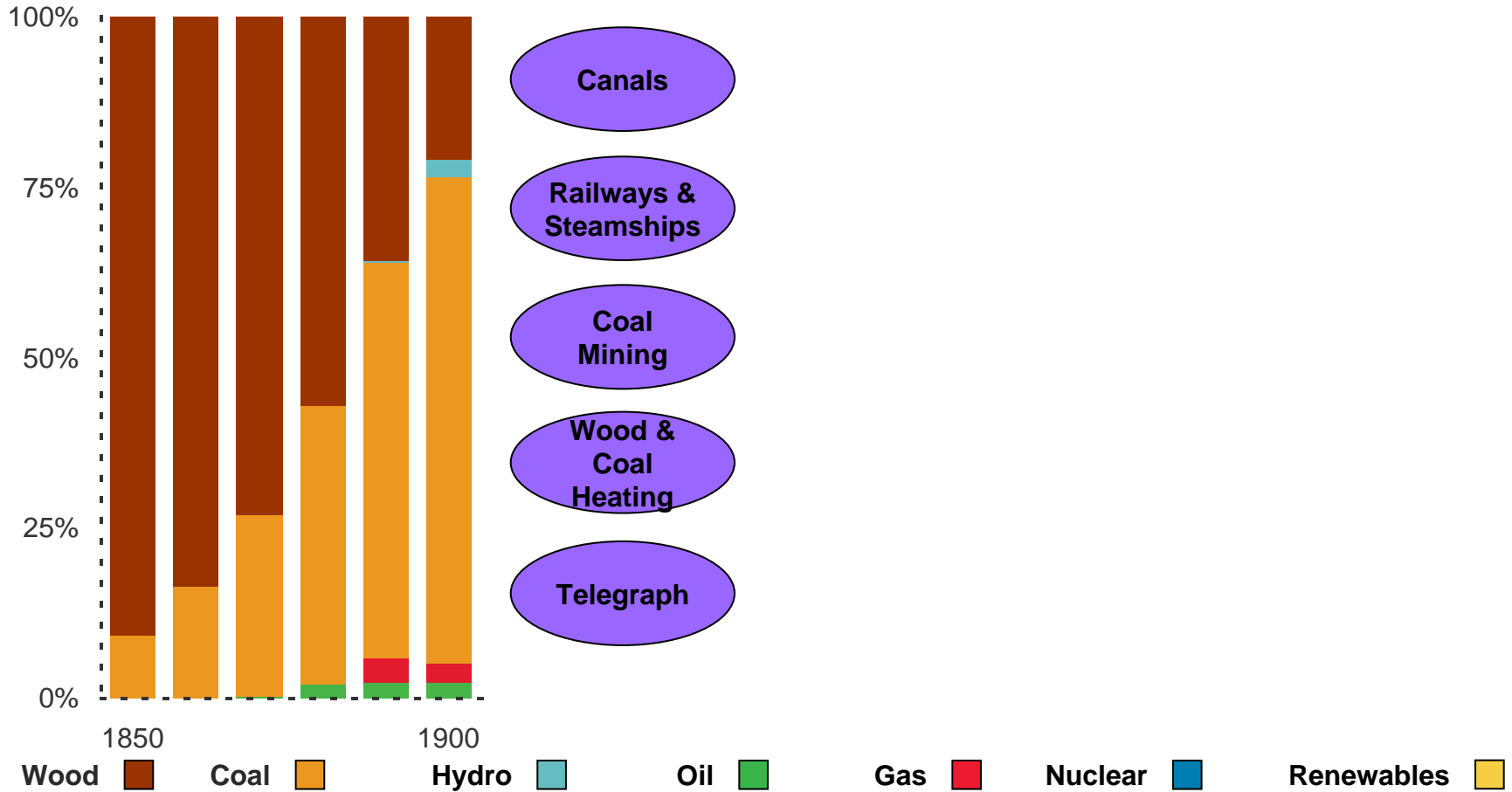
LNG: Liquefied Natural Gas

Transition to Modern Energy / Technology



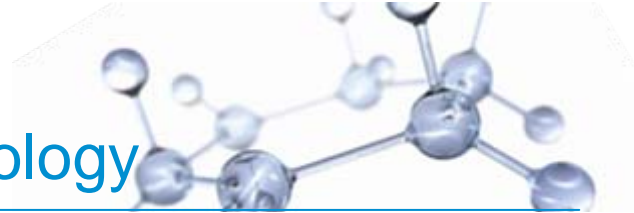
US Energy Demand

Percent



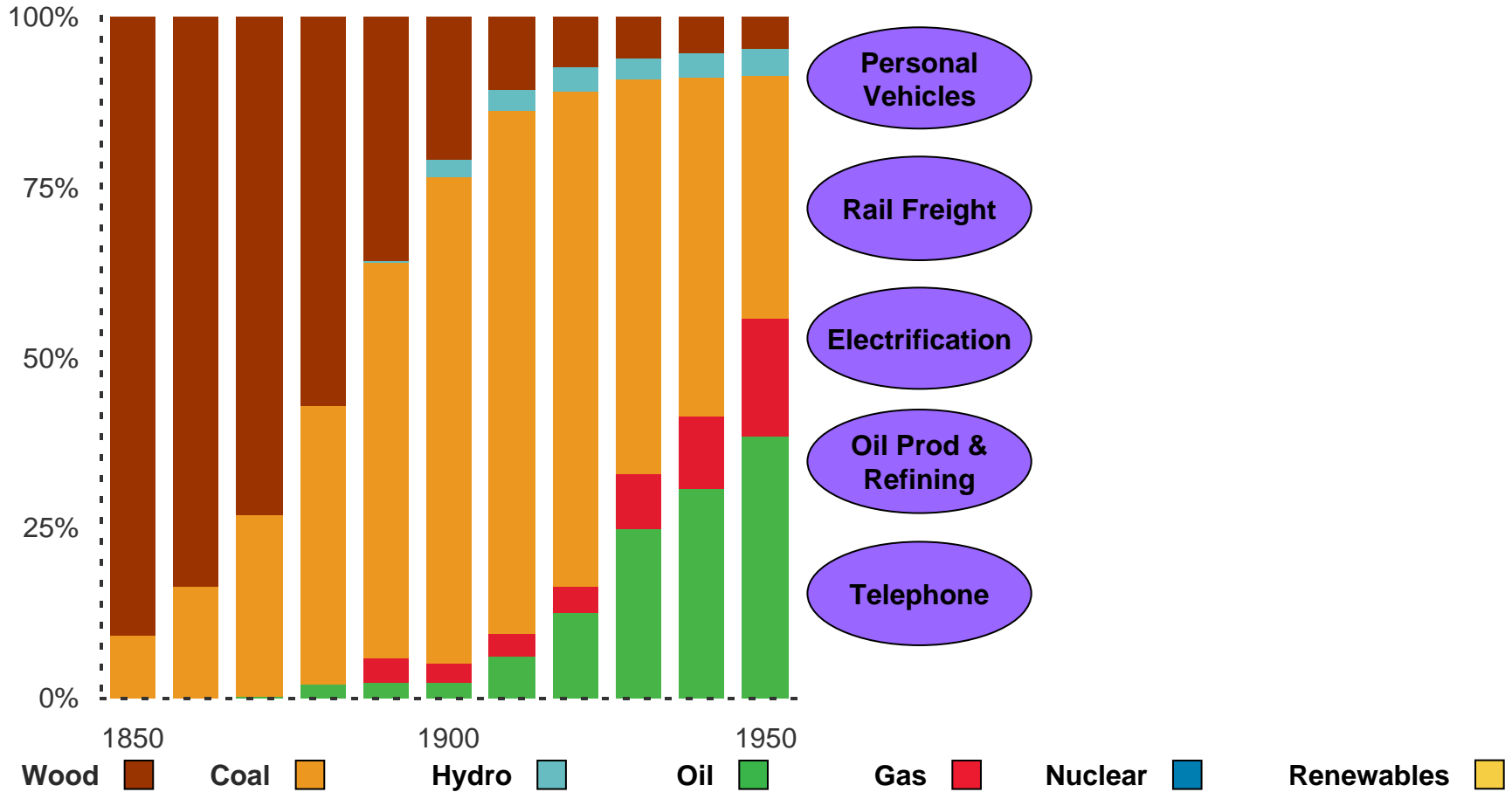
Energy Information Agency

Transition to Modern Energy / Technology

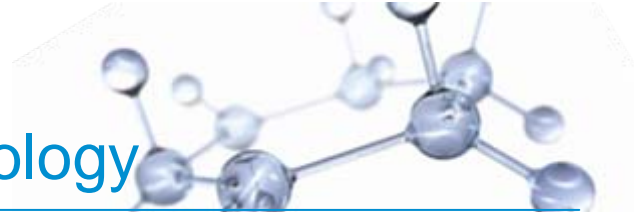


US Energy Demand

Percent

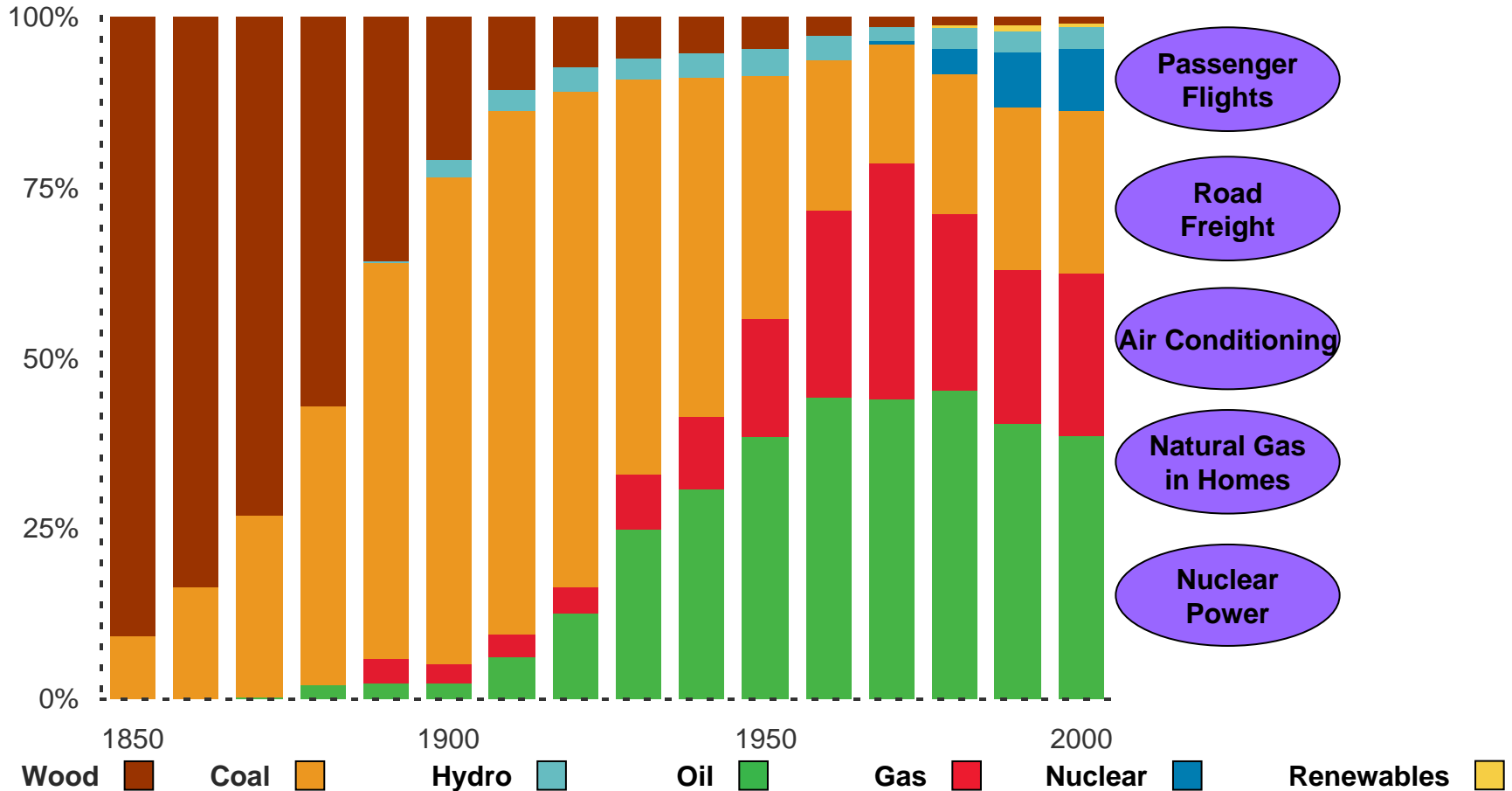


Transition to Modern Energy / Technology

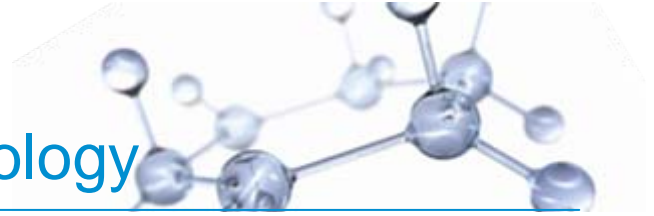


US Energy Demand

Percent

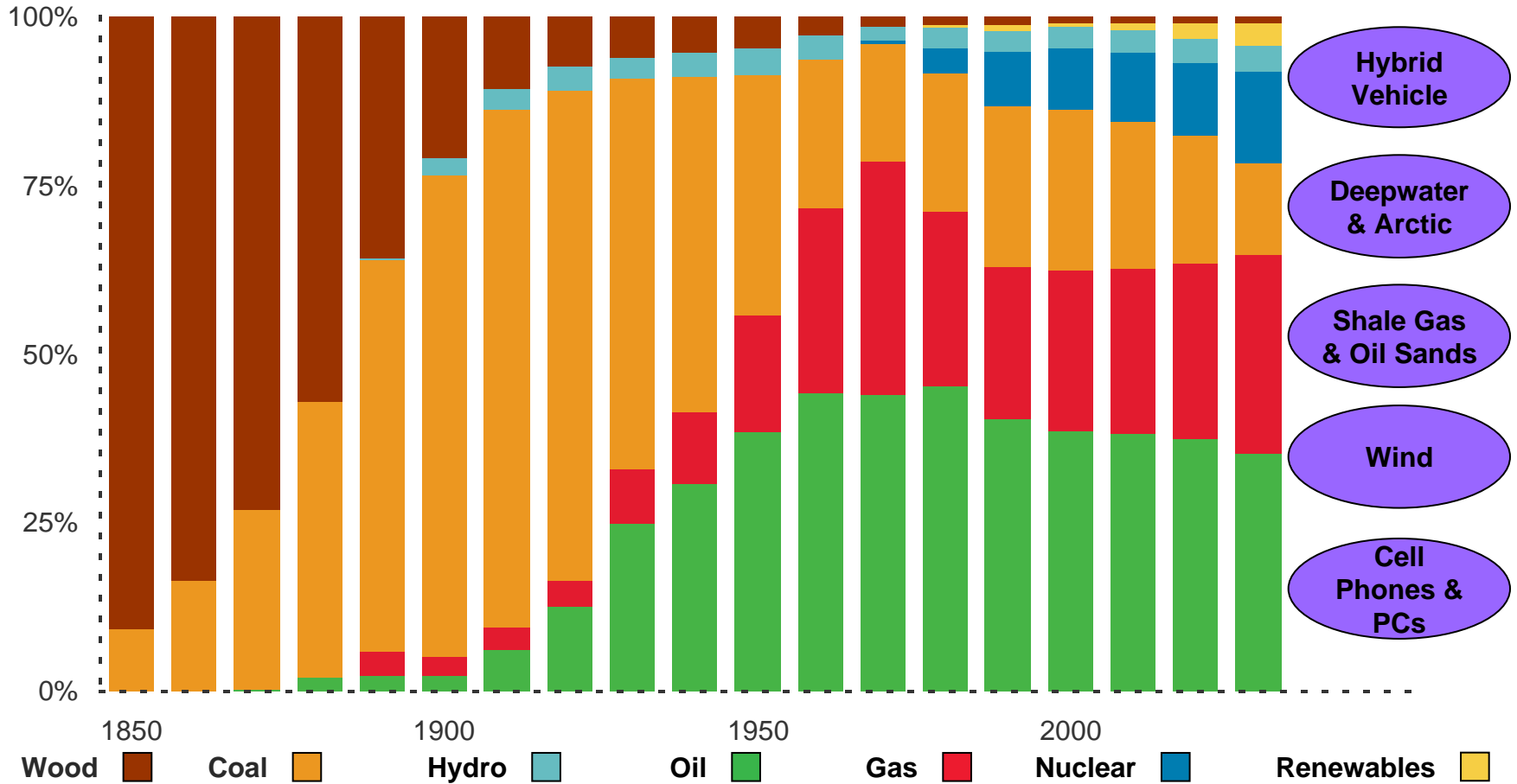


Transition to Modern Energy / Technology

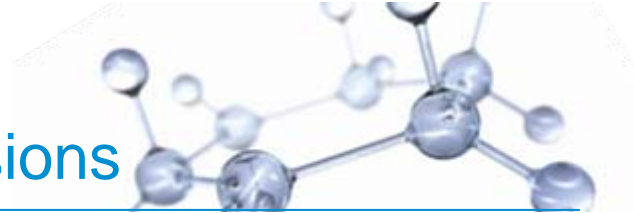


US Energy Demand

Percent

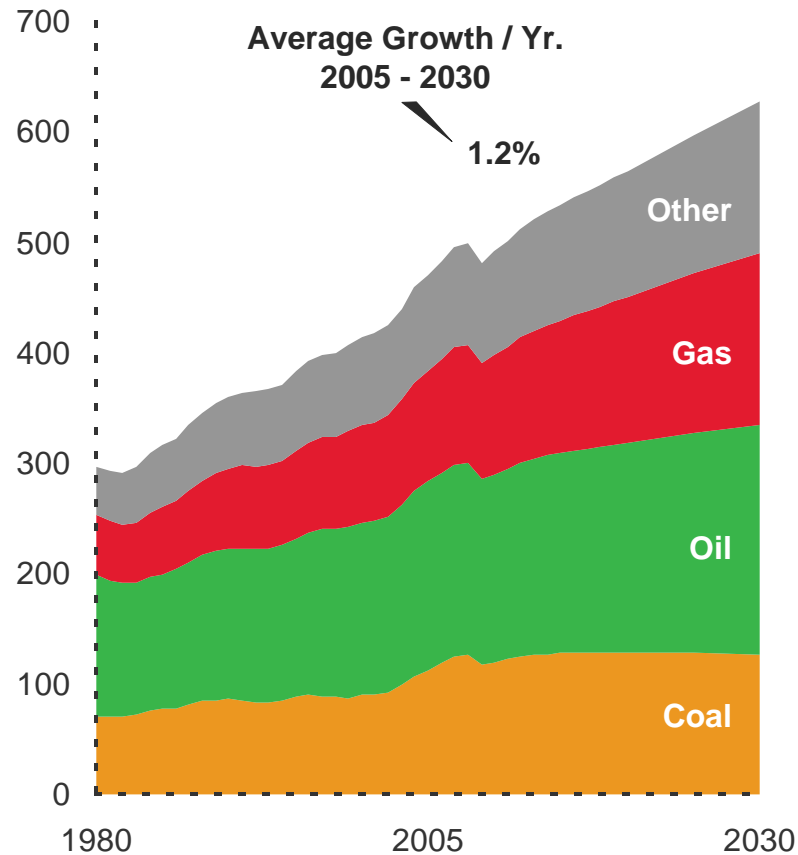


Global Energy Demand & CO₂ Emissions



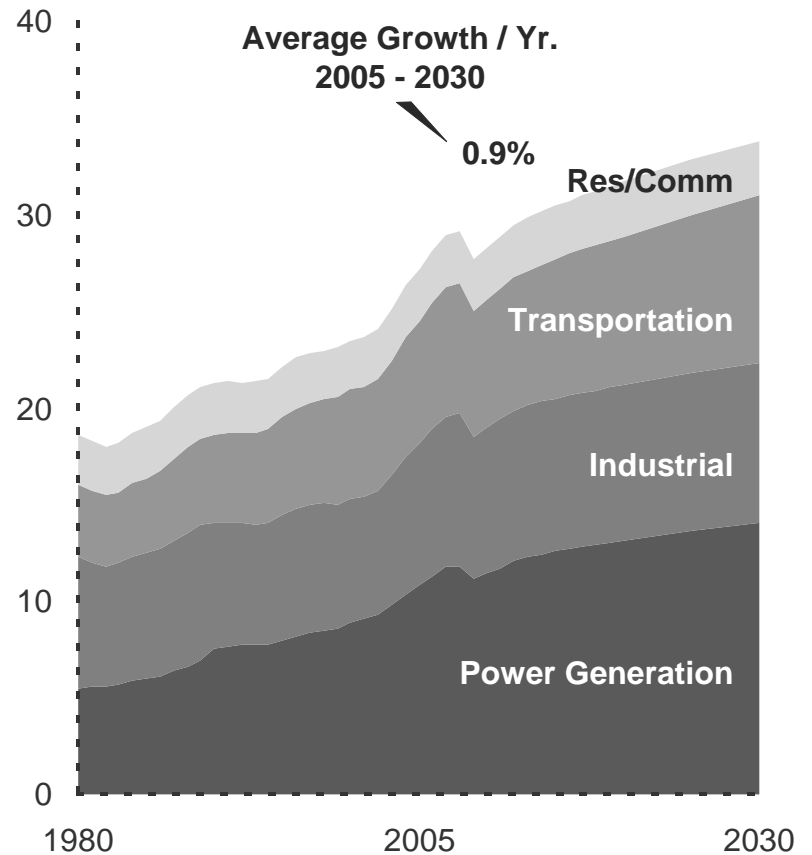
Demand

Quadrillion BTUs

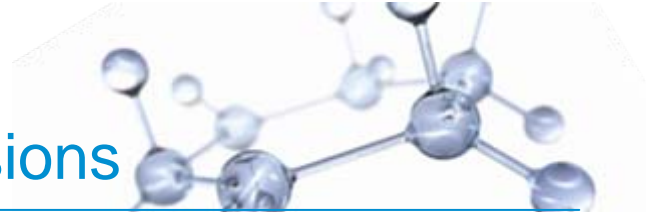


CO₂ Emissions

Billion Tons

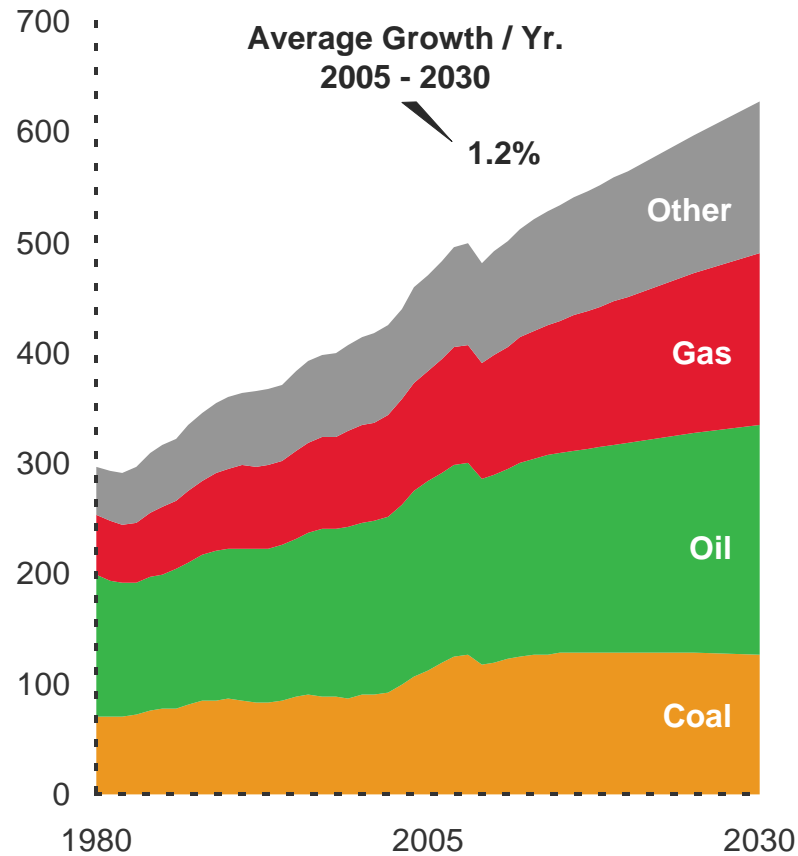


Global Energy Demand & CO₂ Emissions



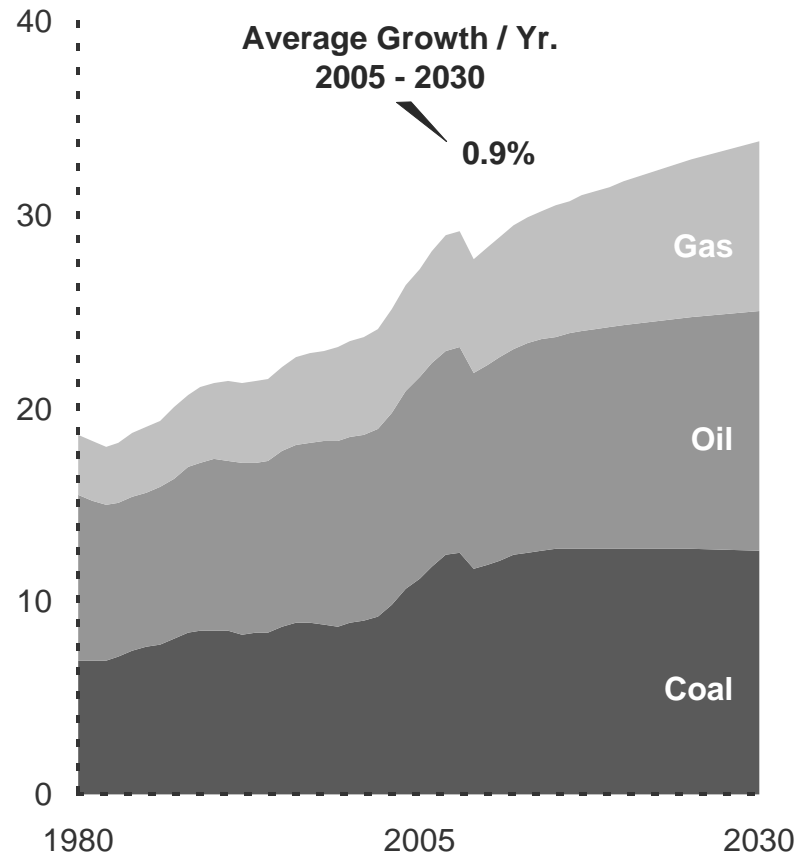
Demand

Quadrillion BTUs

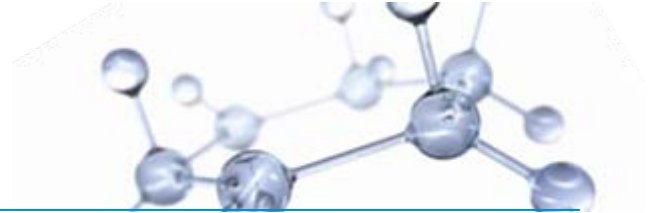


CO₂ Emissions

Billion Tons

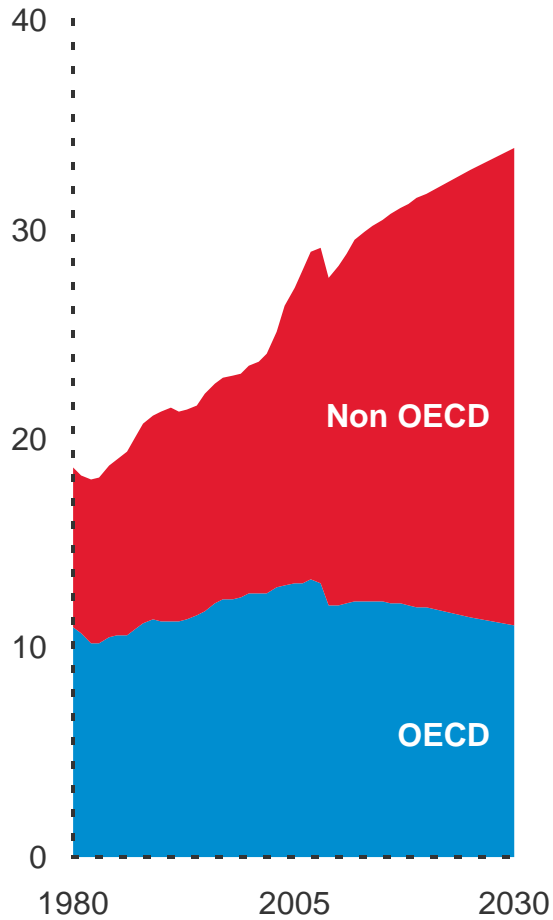


CO₂ Emissions



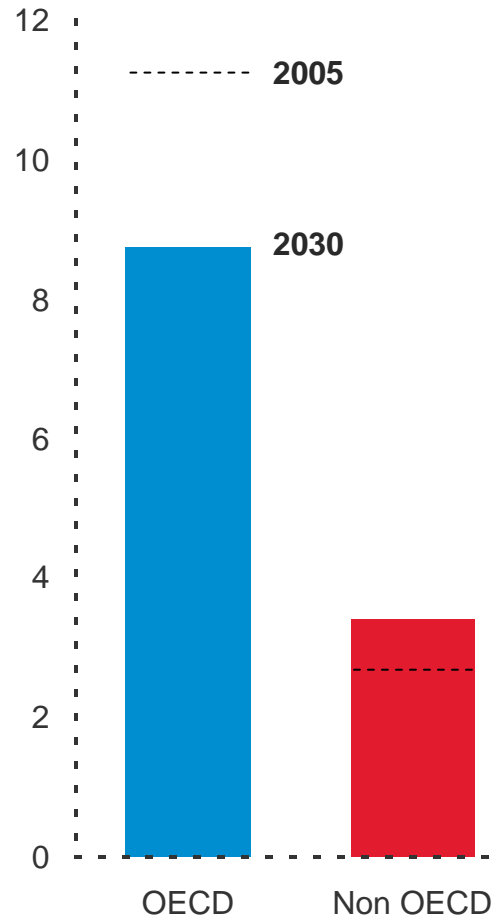
CO₂ Emissions

Billion Tons



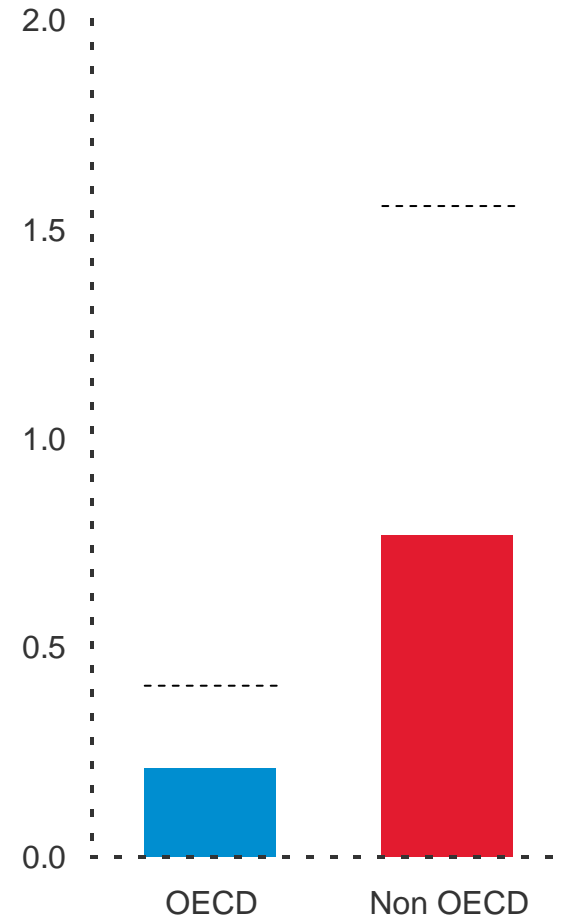
Emissions per Capita

Tons / Person

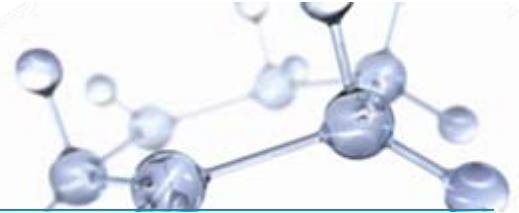


Emissions per GDP

Tons / 2005\$ k GDP

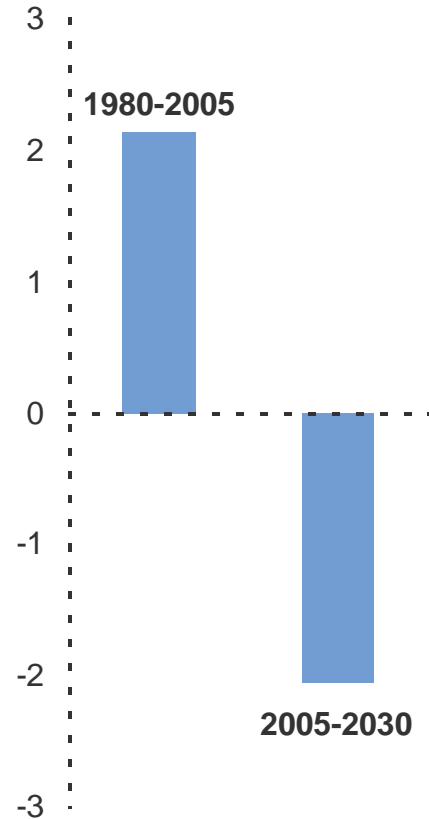


OECD Transitions to Lower Emissions



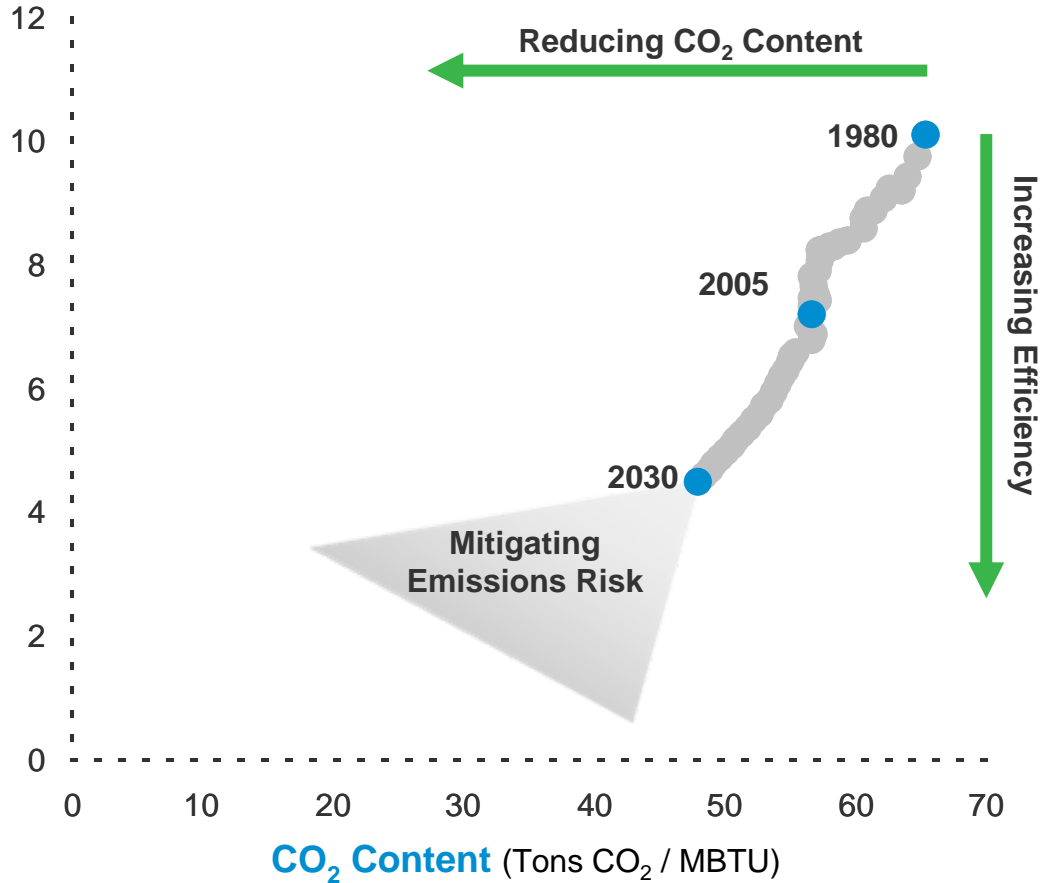
Change in CO₂ Emissions

Billion Tons

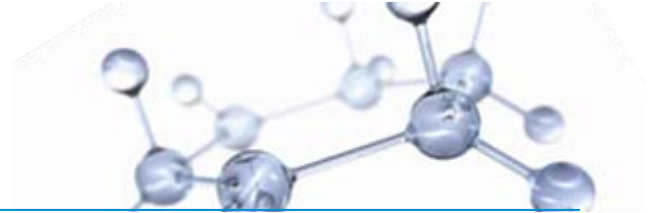


Energy per GDP

MBTU / \$k GDP



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

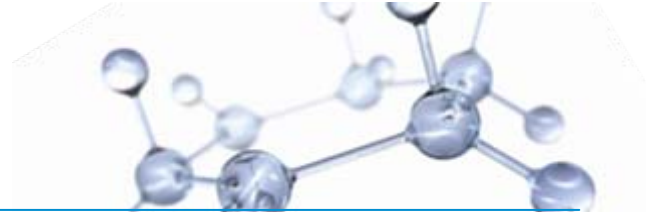
Expand
Supply

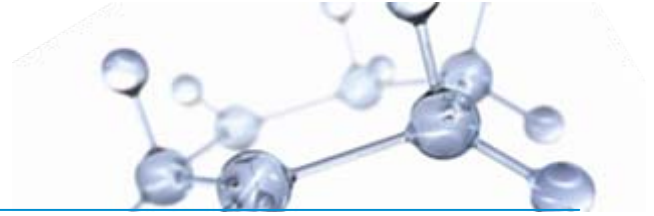
Mitigate
Emissions

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™