

ExxonMobil

Taking on the world's toughest energy challenges.™

The Outlook for Energy A View to 2030

Florida International University

Scott A. Nauman
Corporate Strategic Planning
February 8, 2011



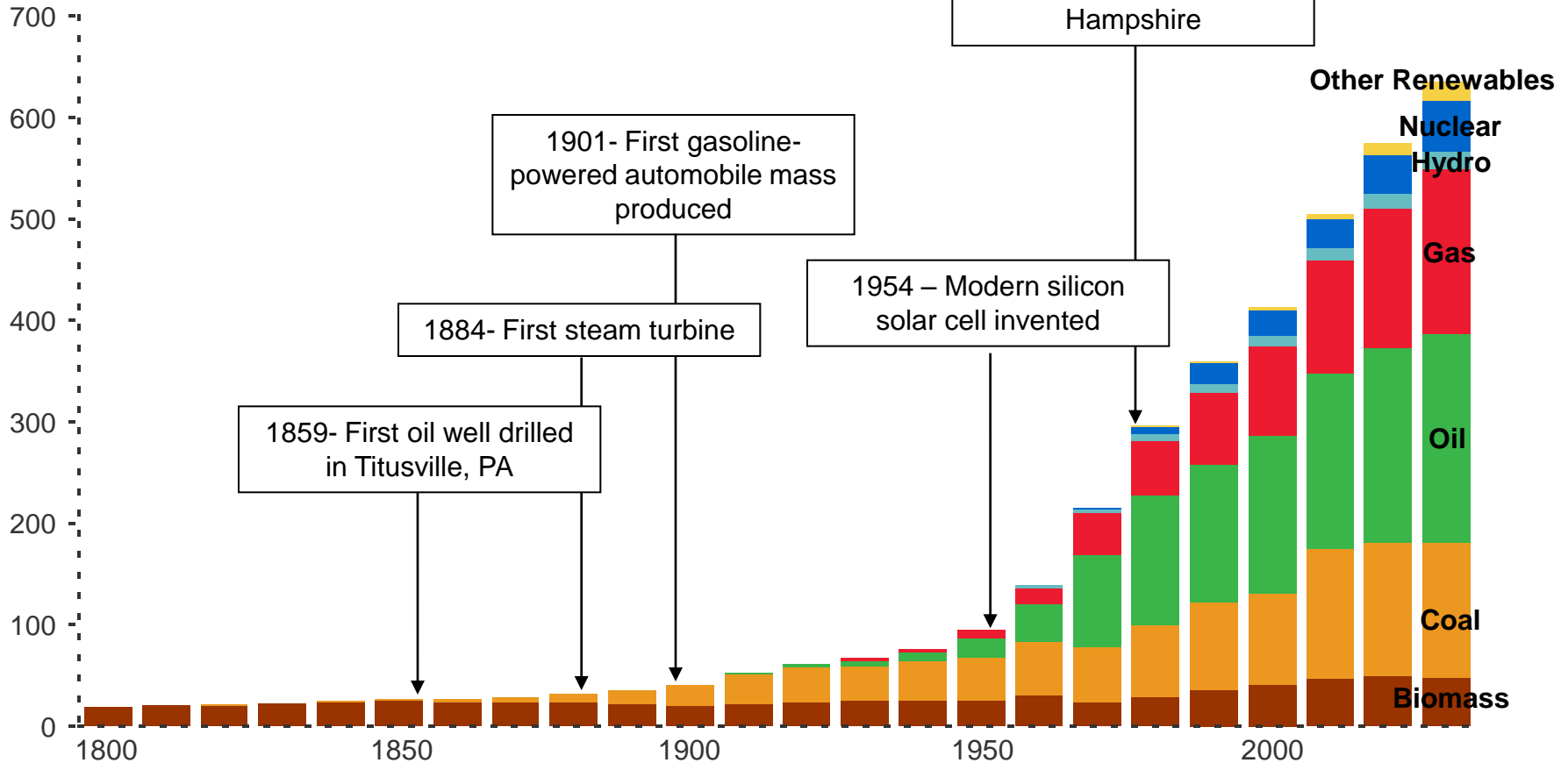
This presentation includes forward-looking statements. Actual future conditions (including economic conditions, energy demand, and energy supply) could differ materially due to changes in technology, the development of new supply sources, political events, demographic changes, and other factors discussed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

Economic and Energy Evolution

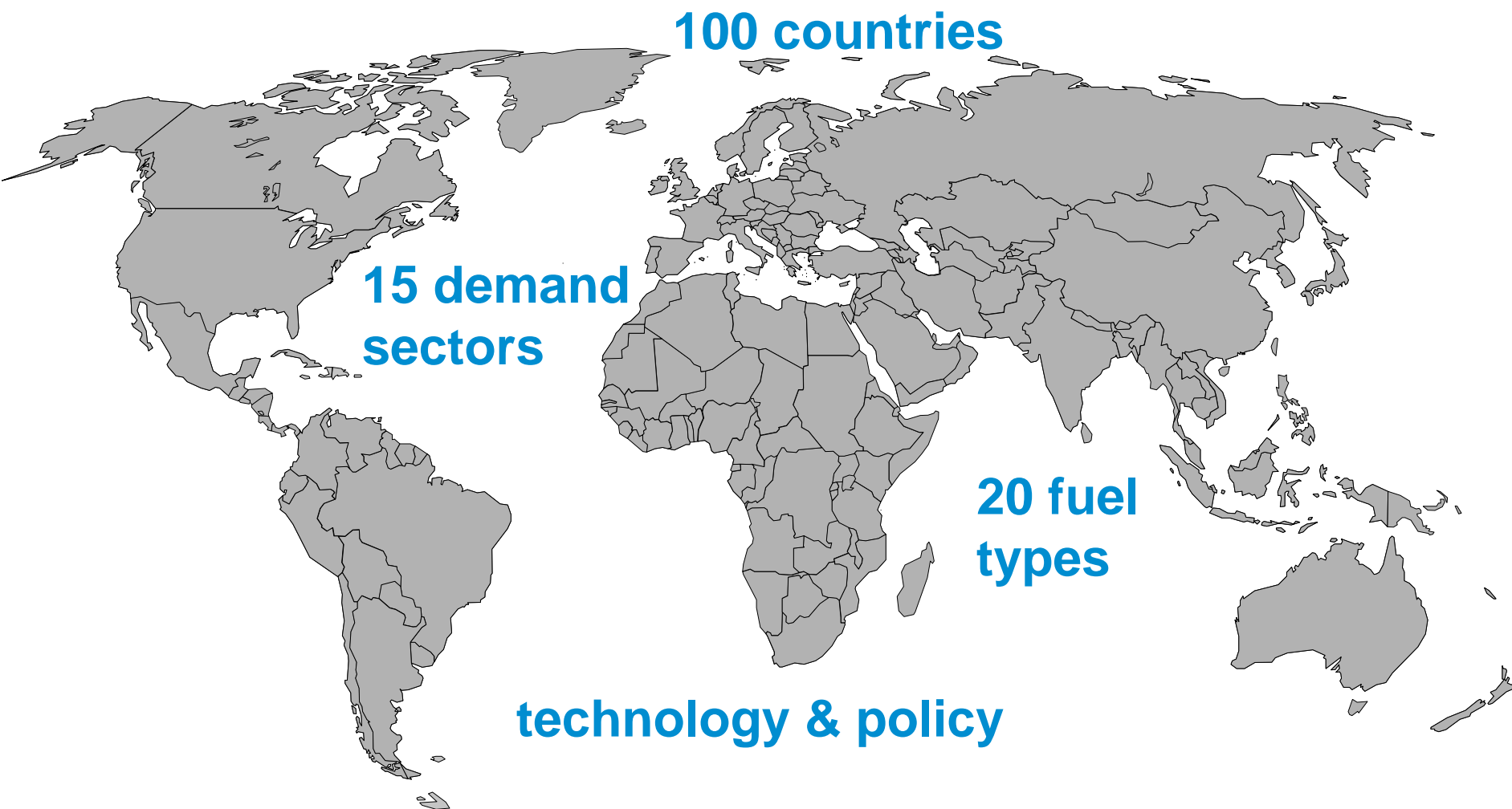


Global Demand By Fuel

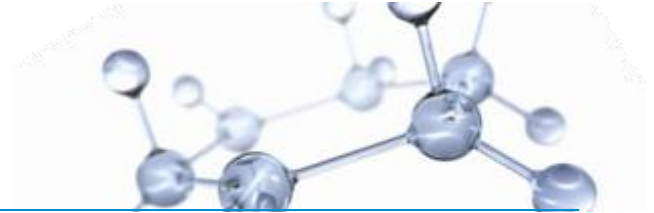
Quadrillion BTUs



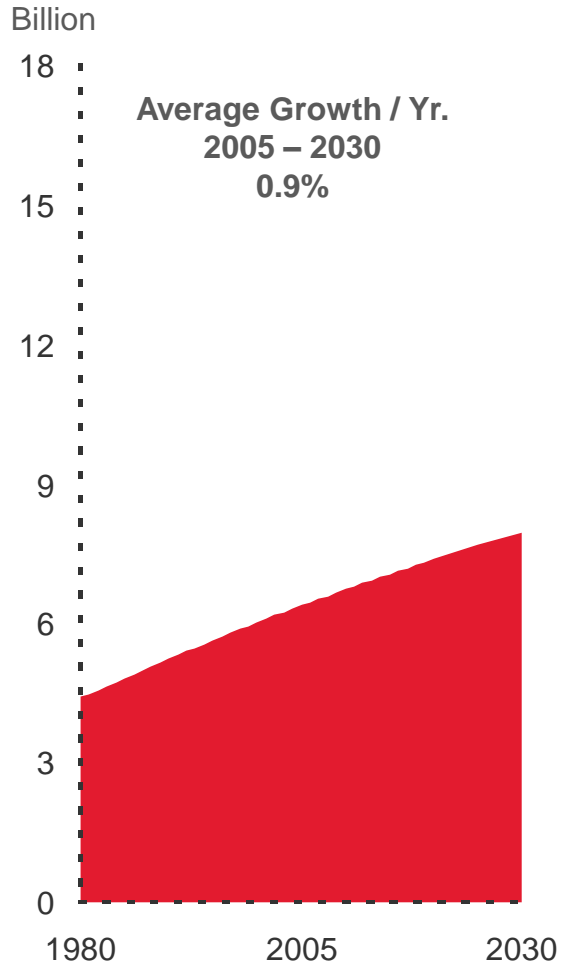
Energy Outlook Basis



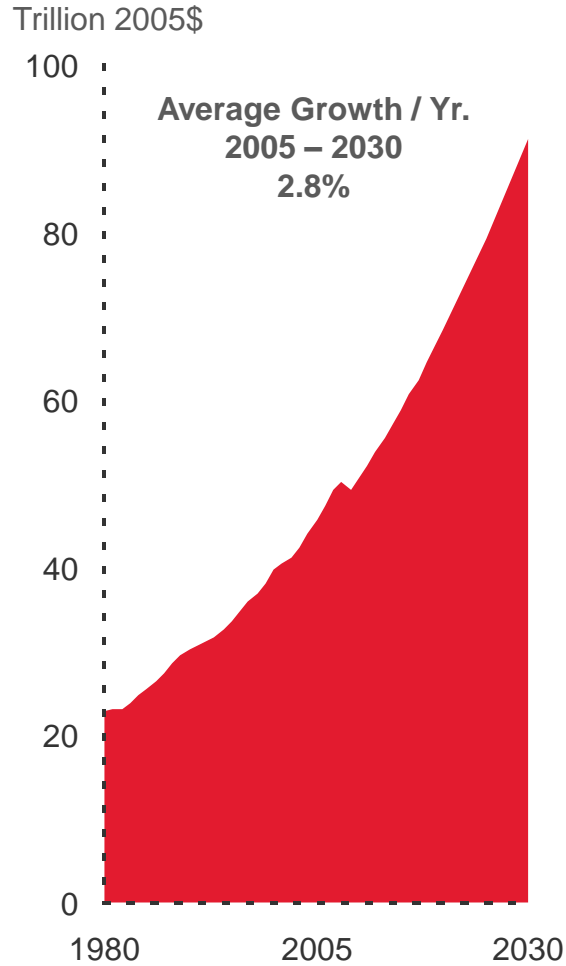
Global Progress Drives Demand



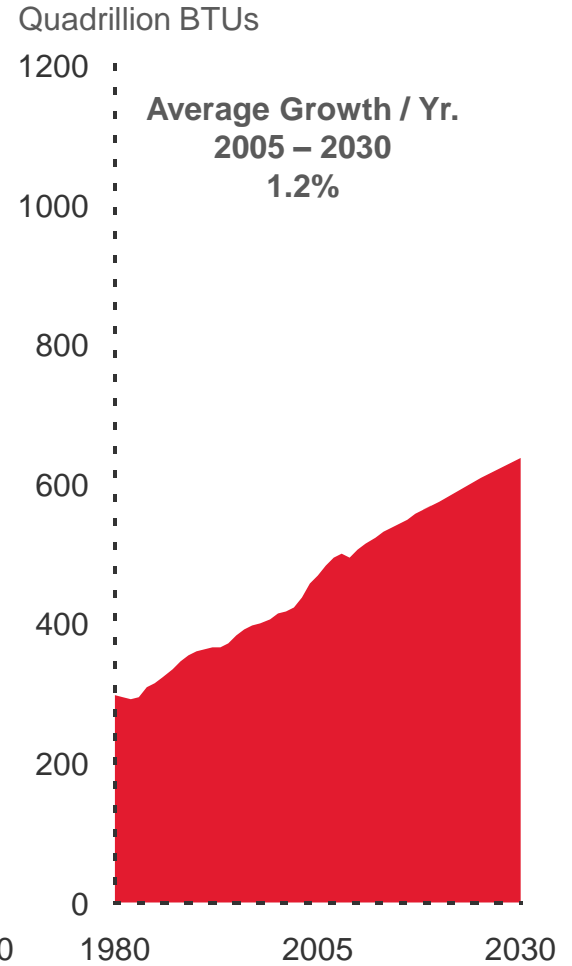
Population



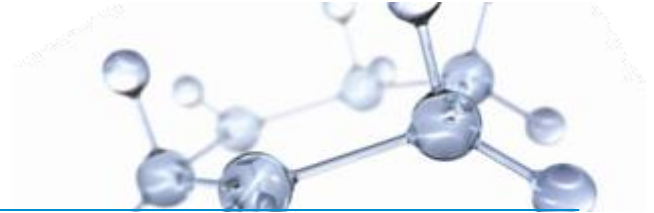
GDP



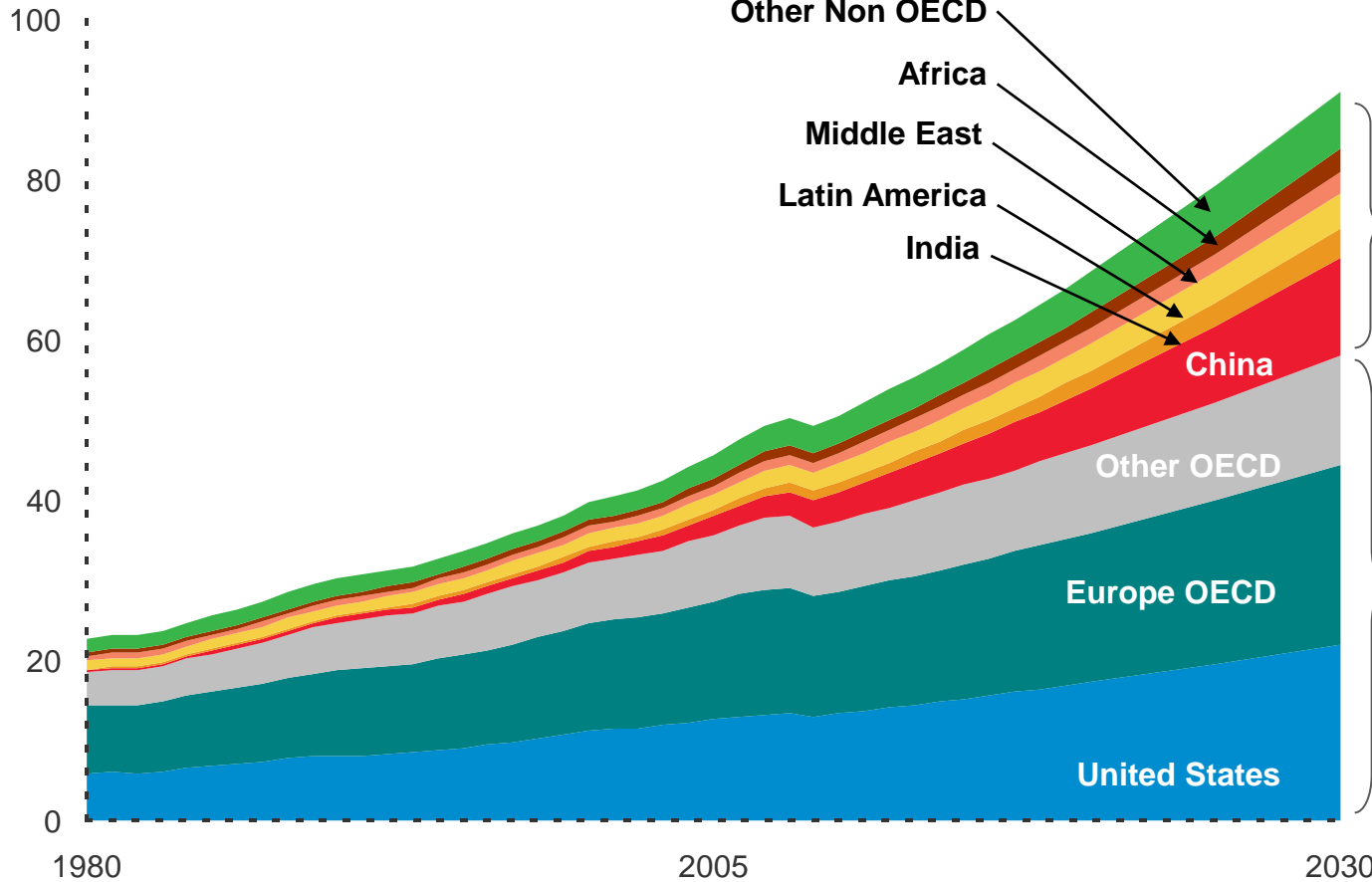
Energy Demand



Economic Growth Continues



GDP
Trillion 2005\$



**Average Growth / Yr.
2005-2030**

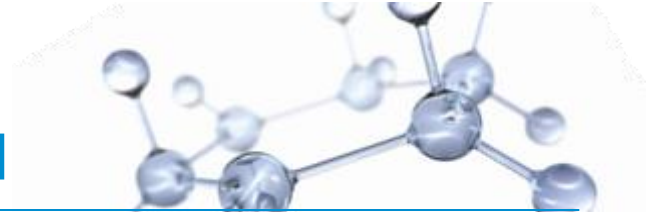
Non OECD

4.9%

OECD

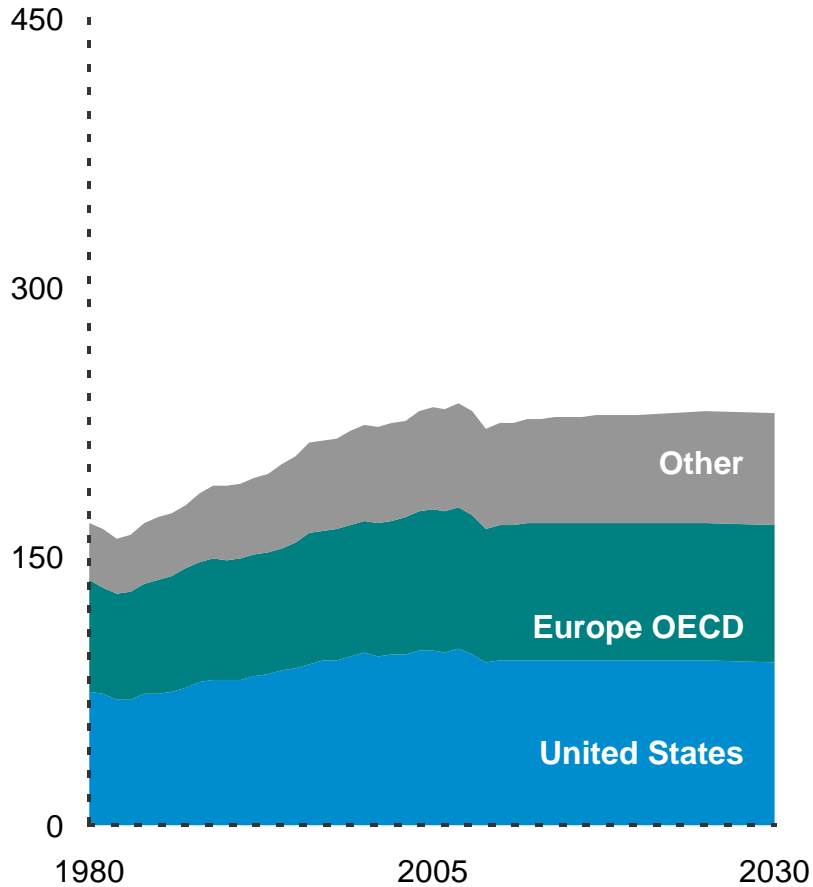
2.0%

Expansion Economies Drive Demand



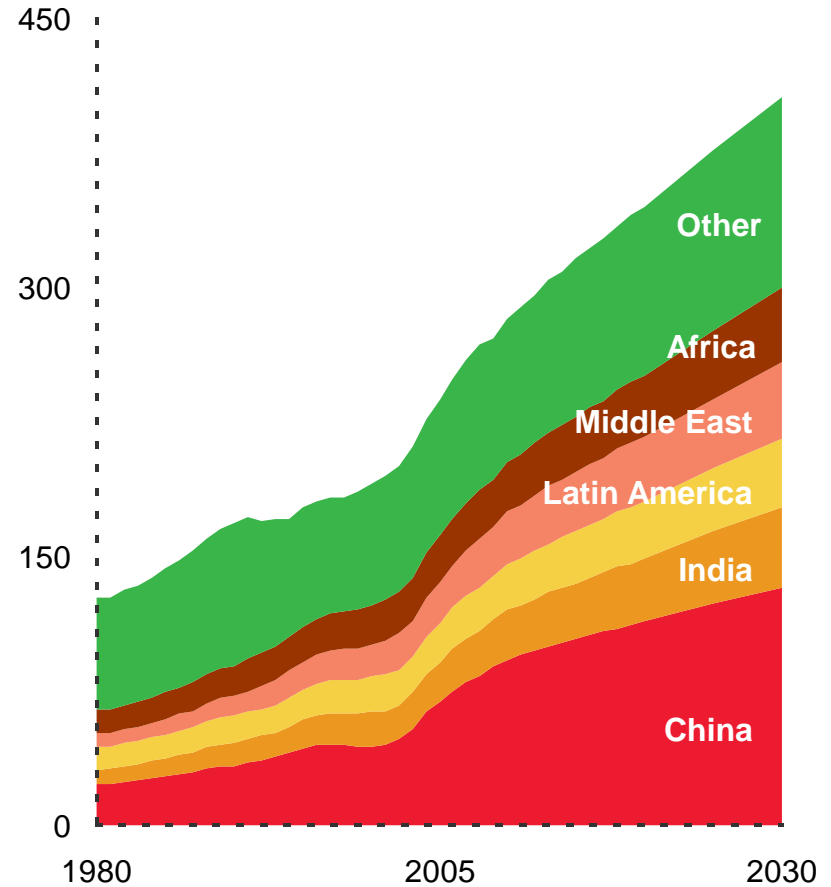
OECD

Quadrillion BTUs

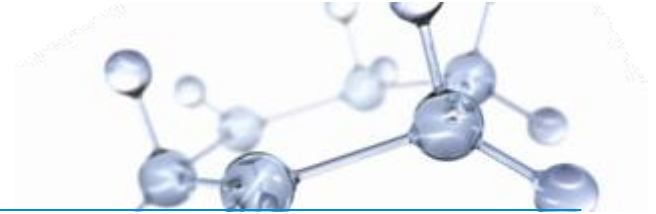


Non OECD

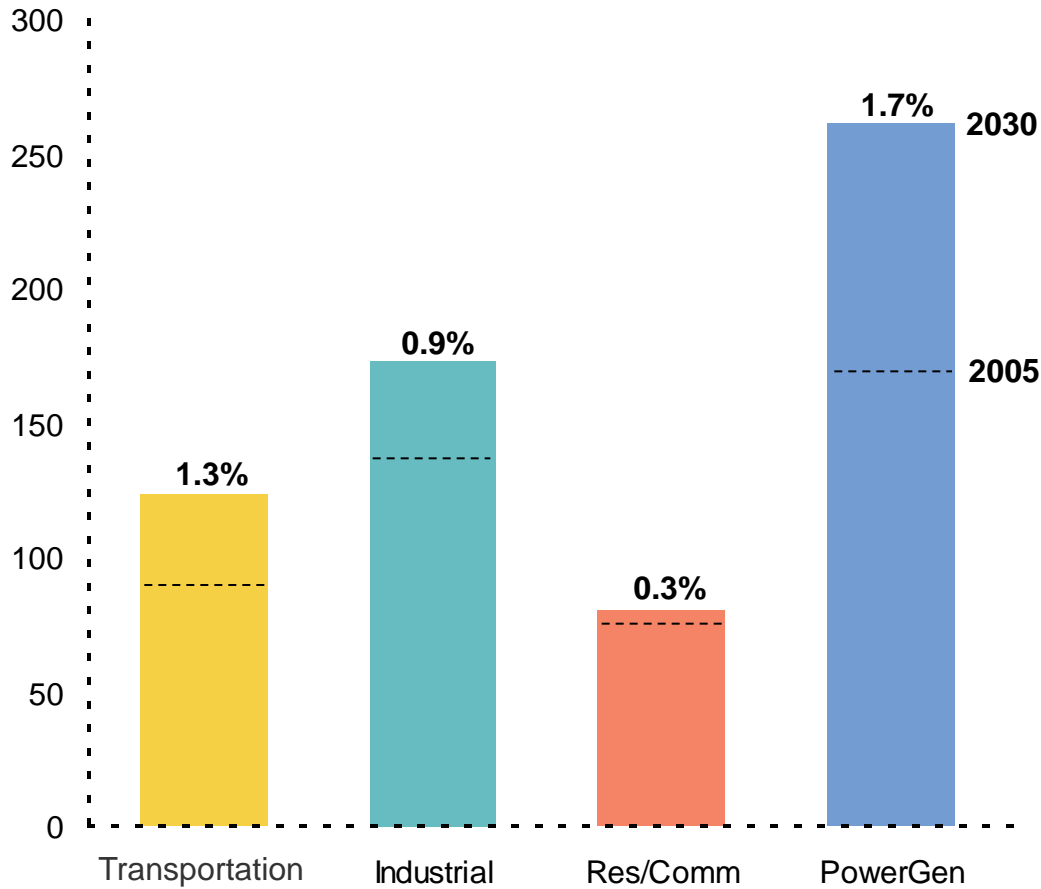
Quadrillion BTUs



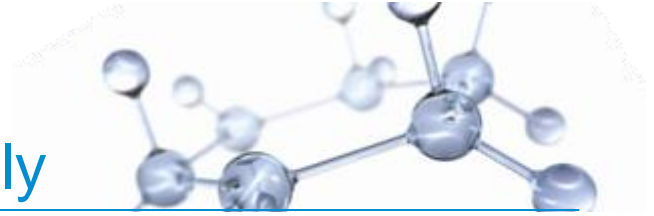
Demand by Sector



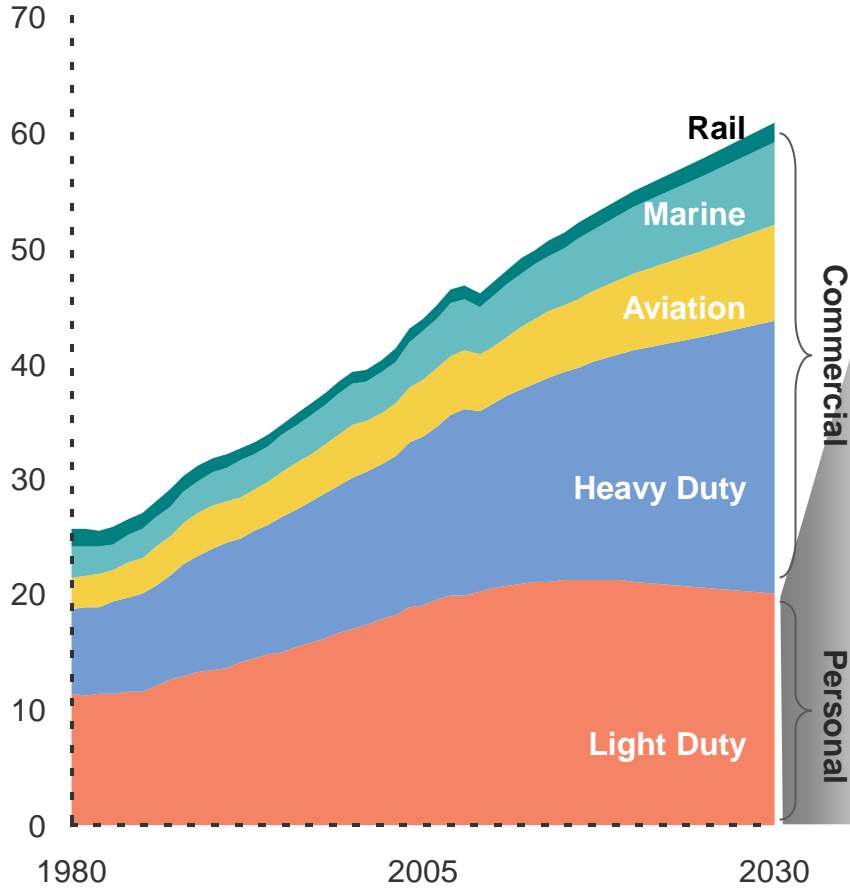
Quadrillion BTUs



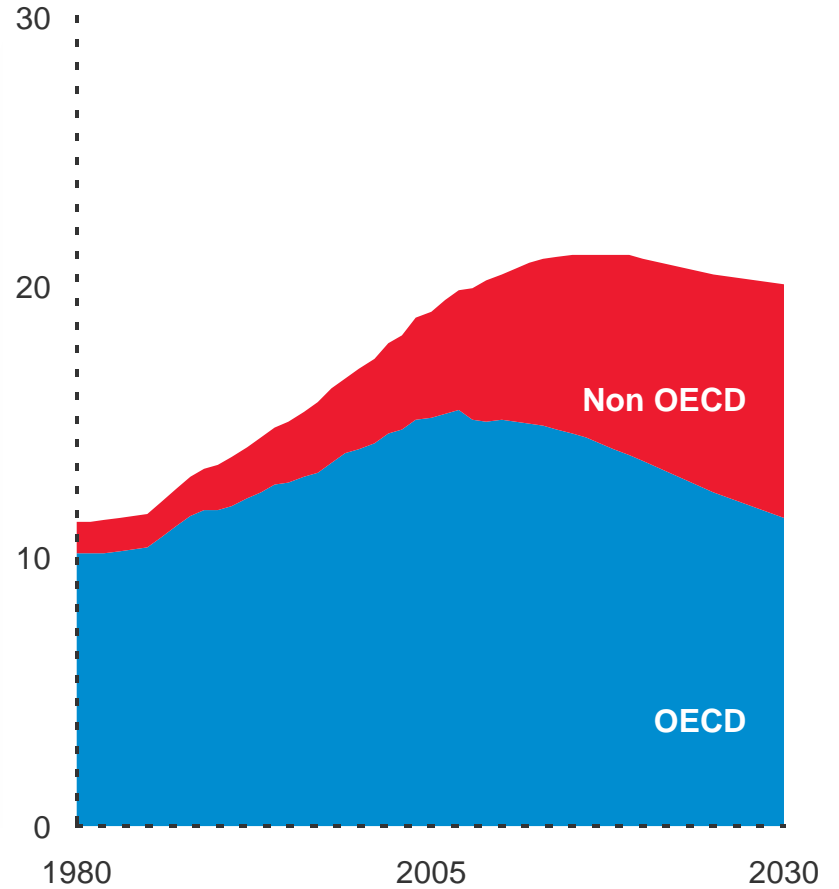
Transportation Demand Grows Steadily



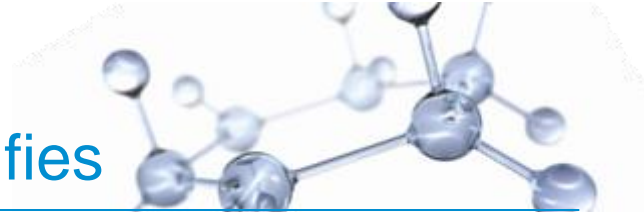
Demand
MBDOE



Light Duty Demand
MBDOE



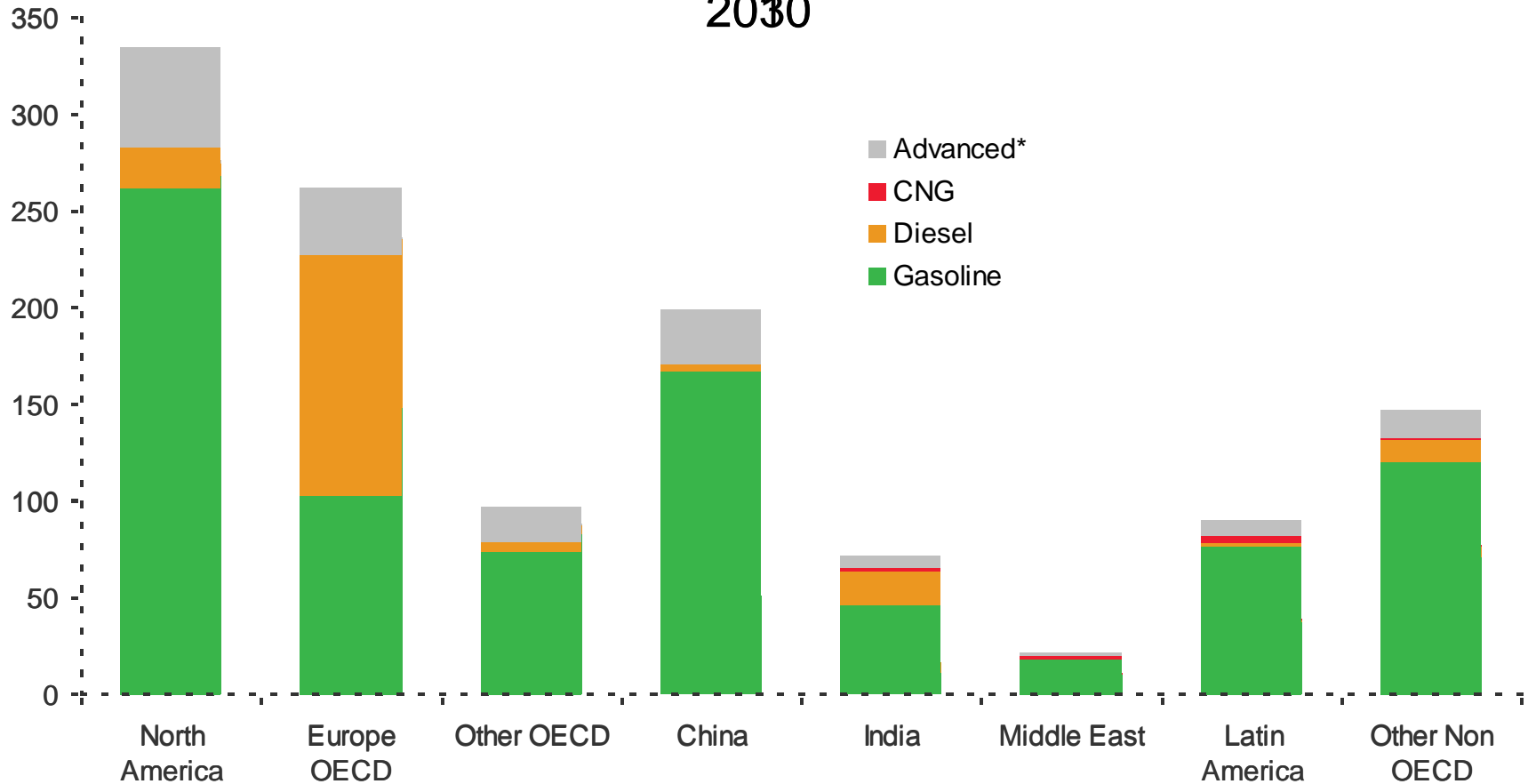
Personal Transportation Fleet Diversifies



Powertrain Technology

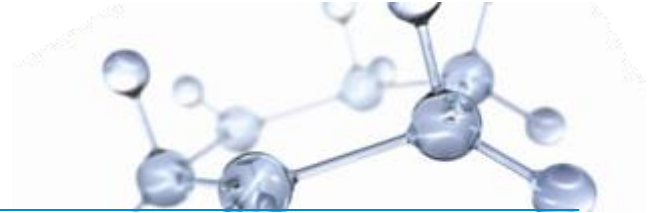
Millions of Vehicles

2030

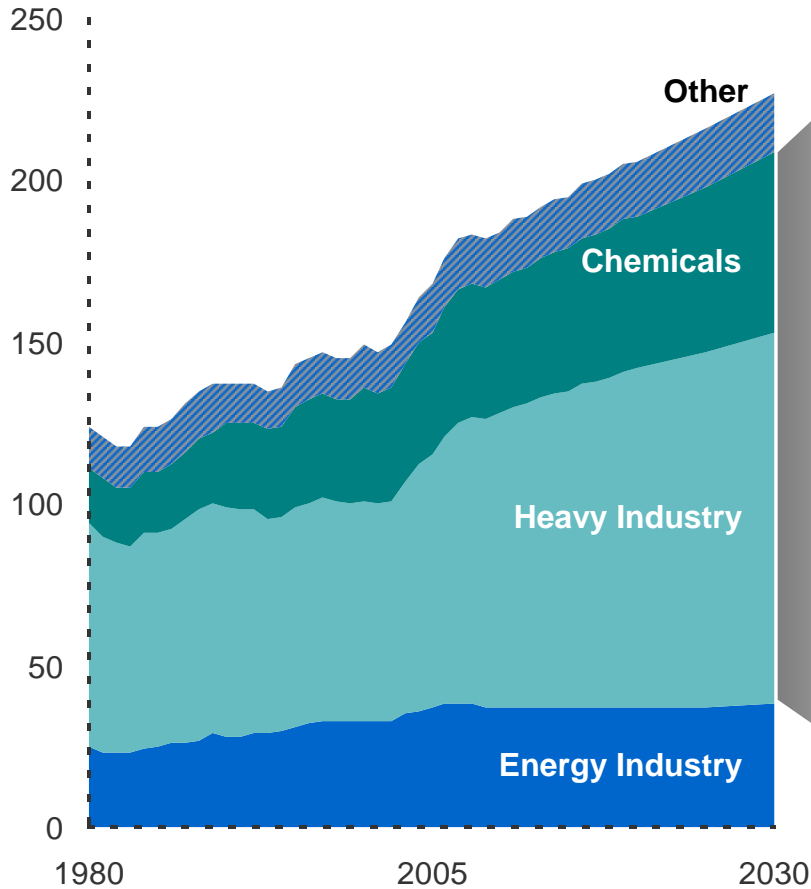


*Full Hybrid, Plug-in Hybrid, Electric Vehicles

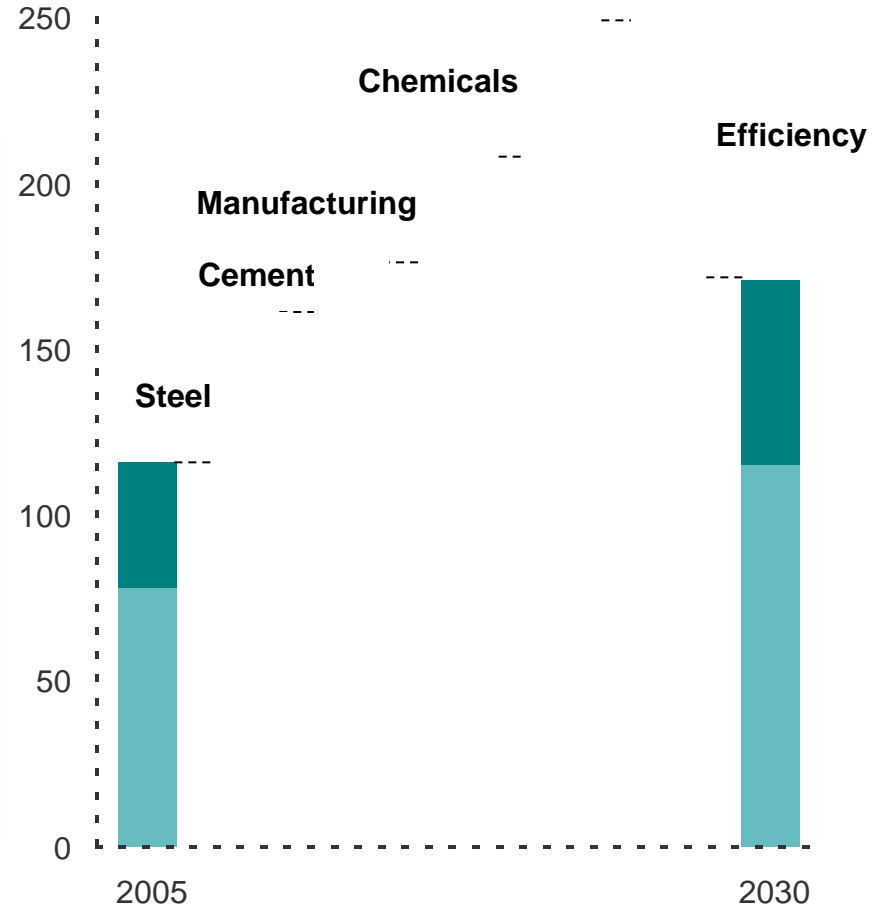
Industrial Demand by Sector



Demand
Quadrillion BTUs



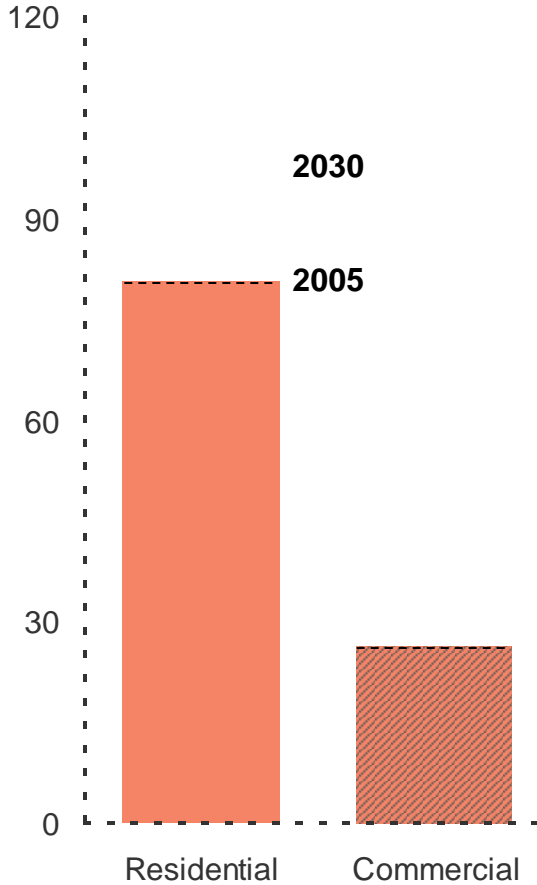
Heavy Industry & Chemicals Demand Changes
Quadrillion BTUs



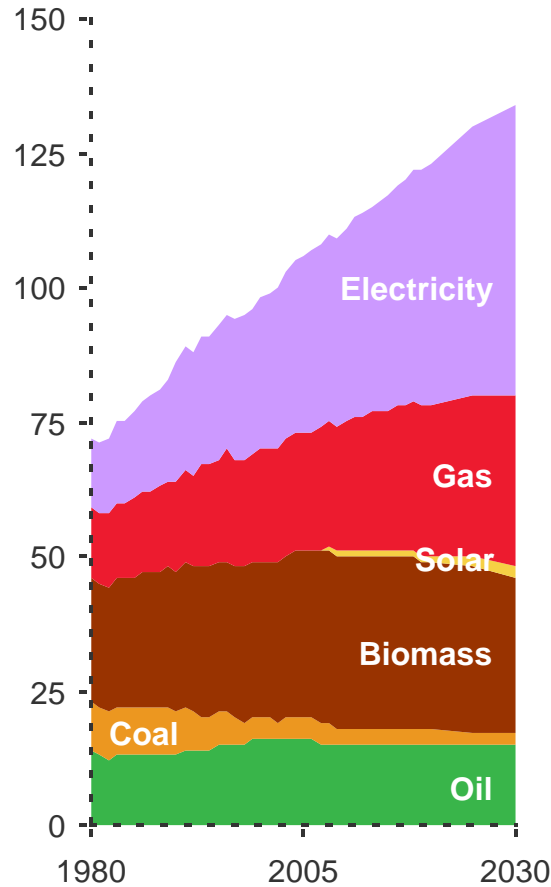
Residential/Commercial Demand Grows



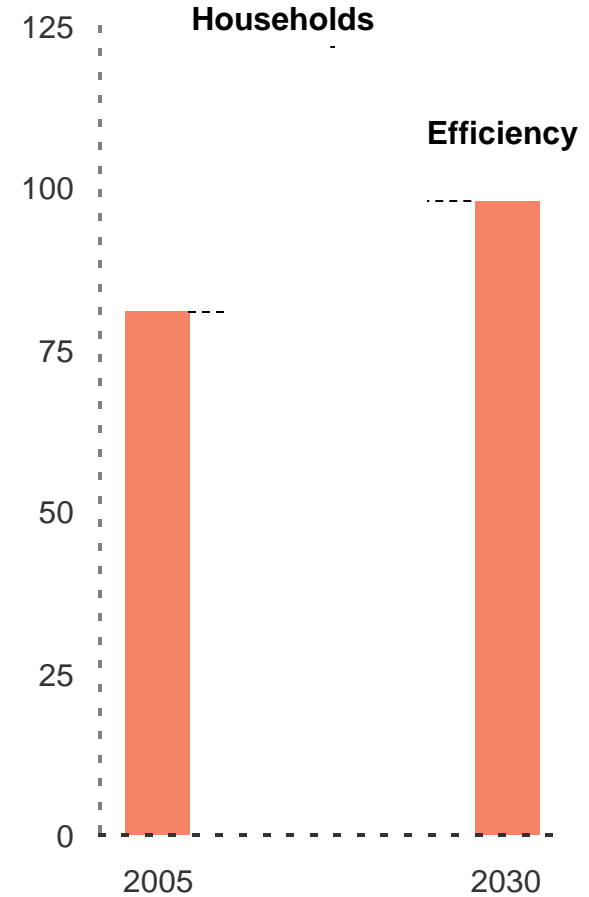
By Sector
Quadrillion BTUs



By Fuel
Quadrillion BTUs



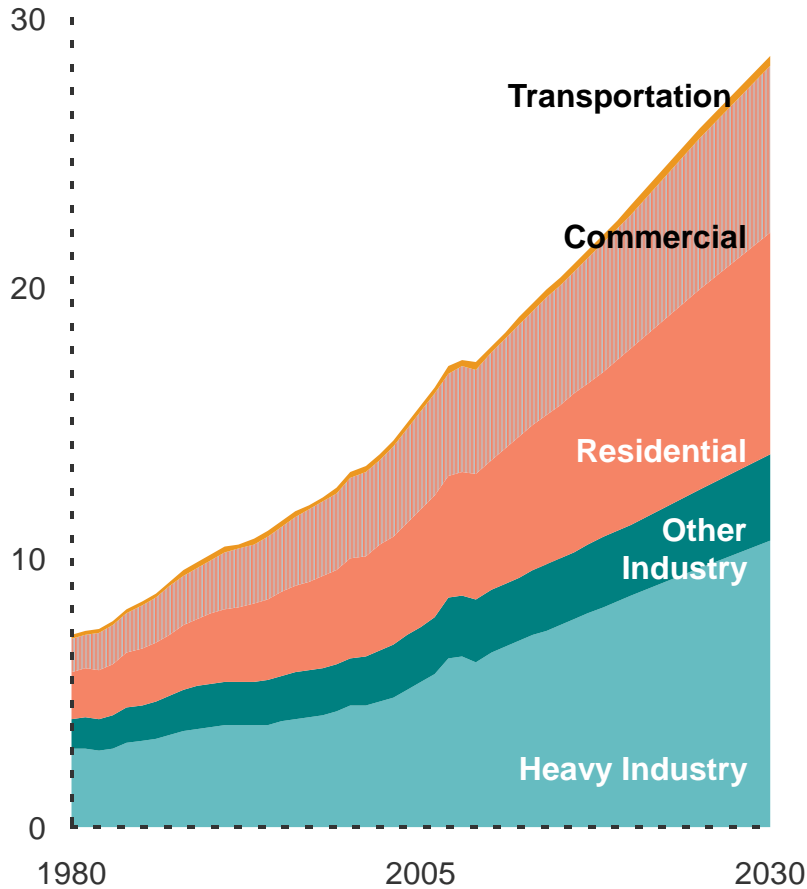
Residential Demand Changes
Quadrillion BTUs



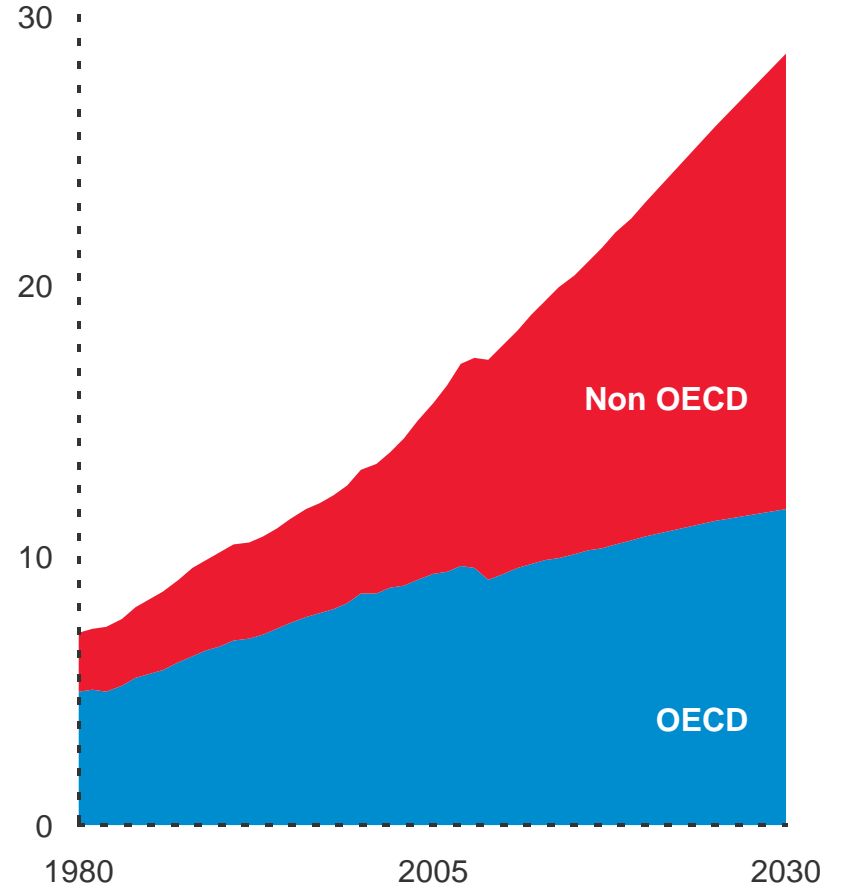
Electricity Demand Continues to Surge



By Sector
k TWh



By Region
k TWh

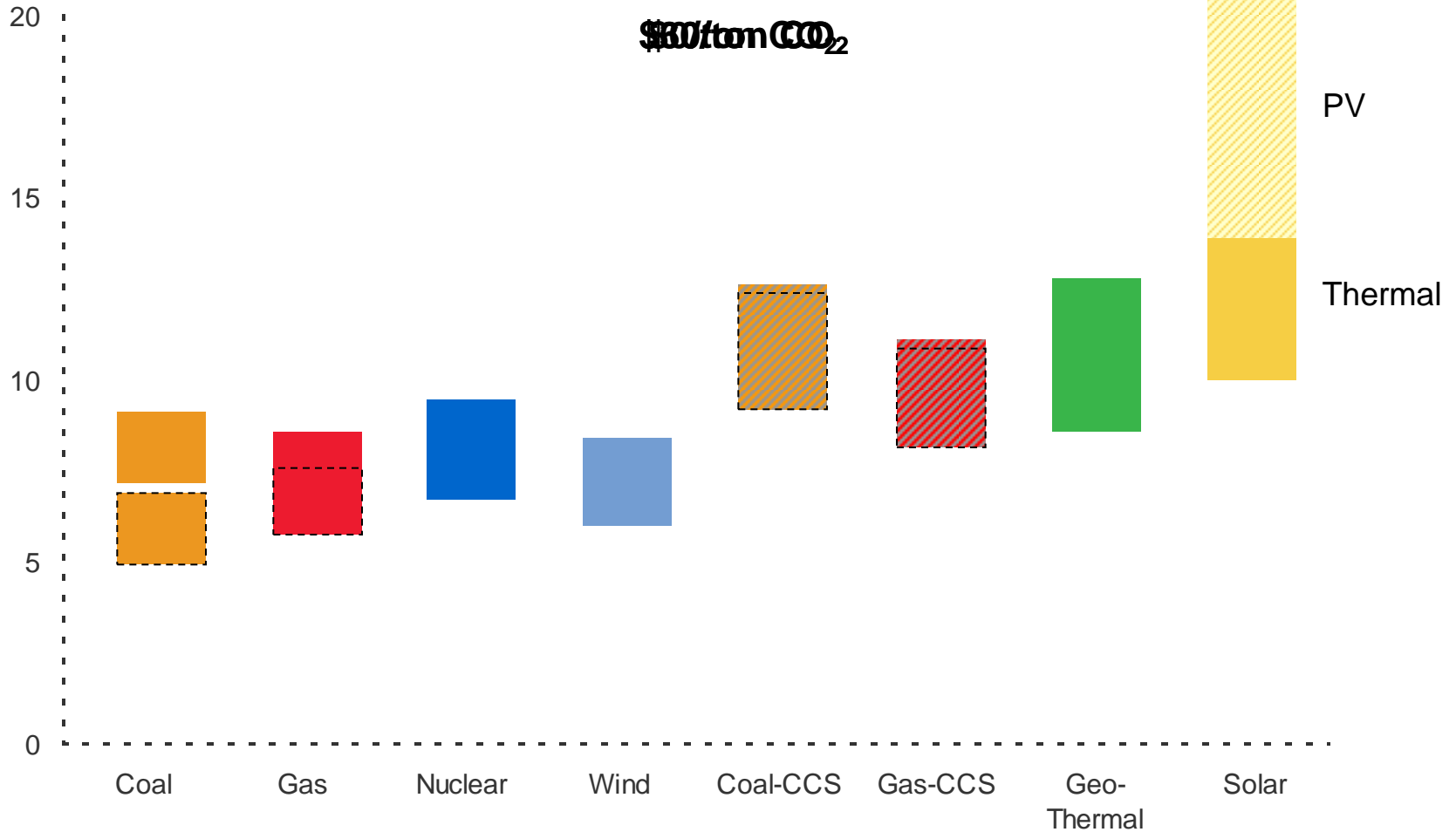


Future U.S. Power Costs

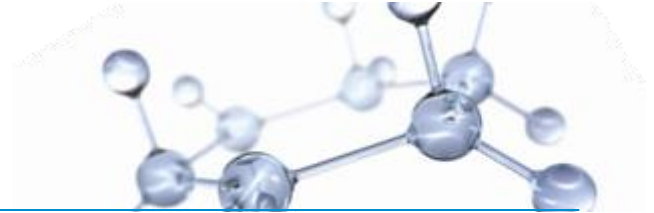


Baseload, Startup 2025

2010 cents/kWh

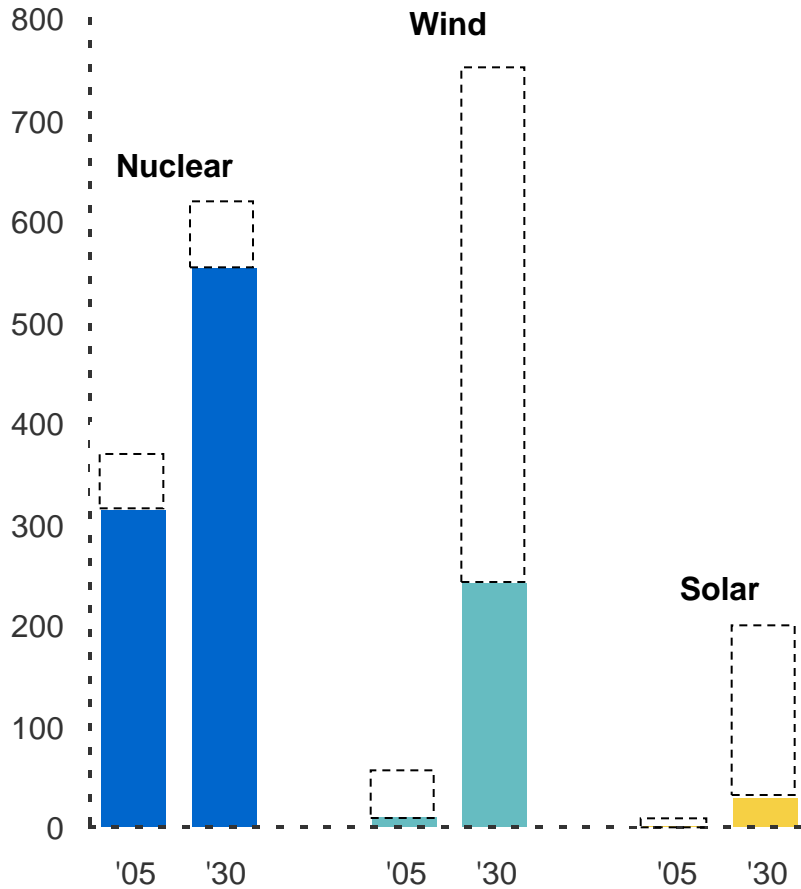


Power Generation Mix Evolves



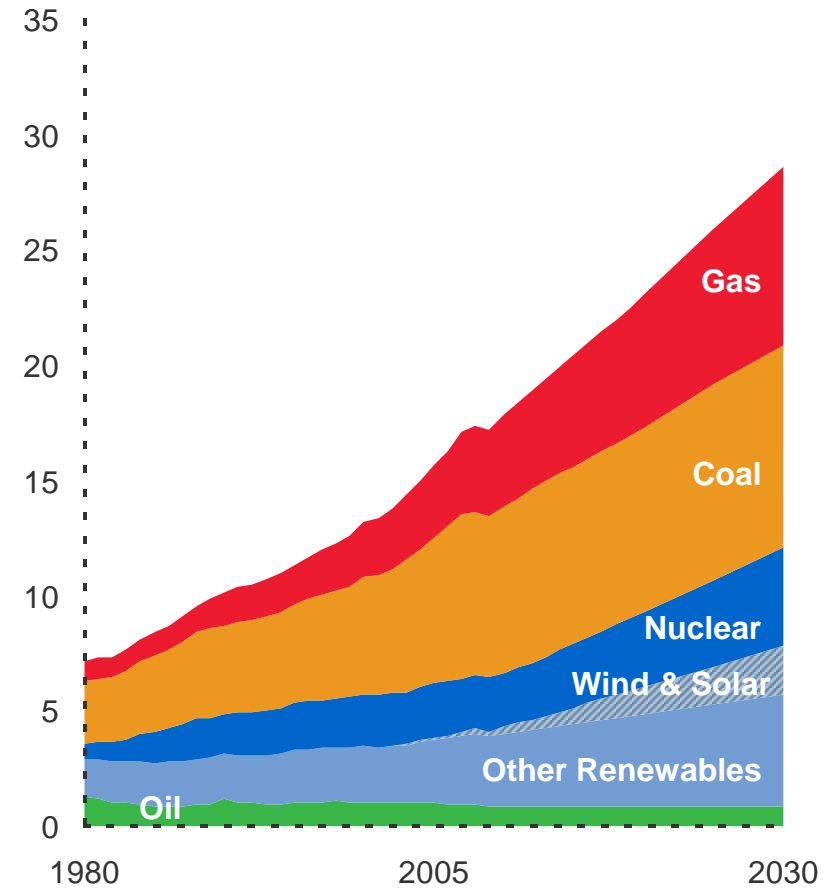
Global Capacity Utilized

GW



By Generation

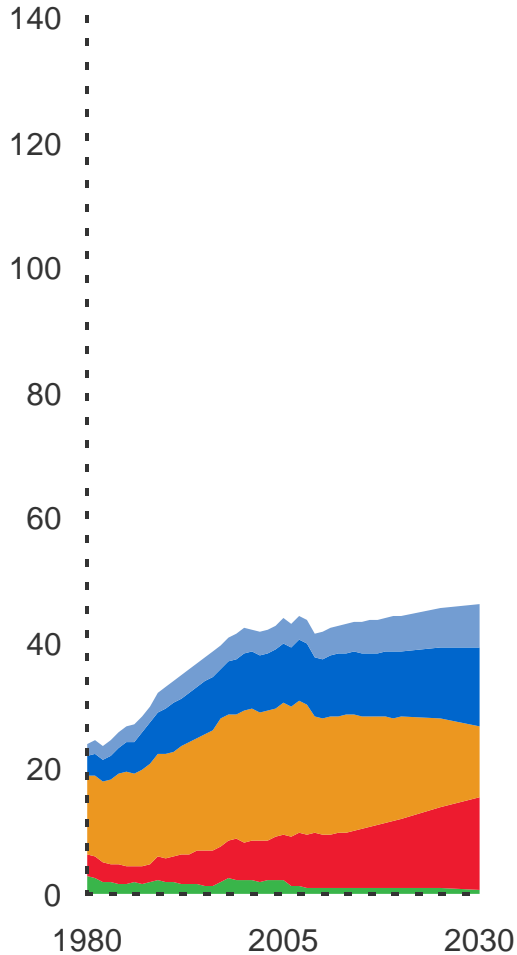
k TWh



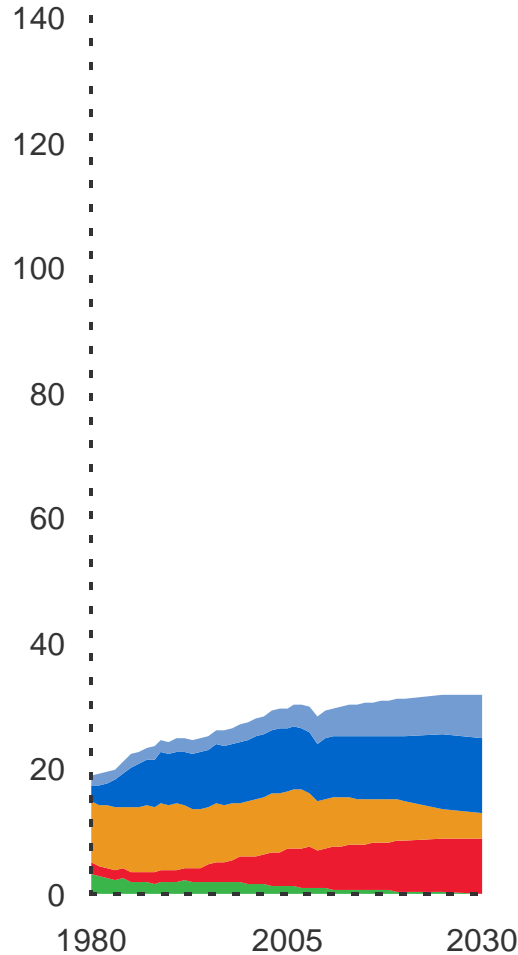
Power Generation by Fuel



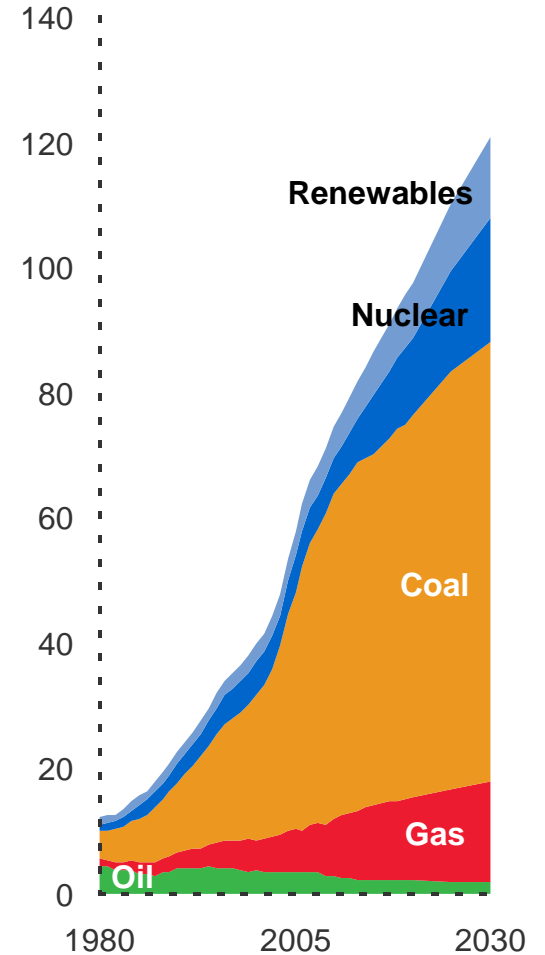
North America
Quadrillion BTUs



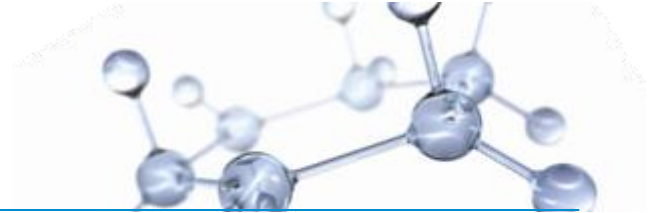
Europe
Quadrillion BTUs



Asia Pacific
Quadrillion BTUs

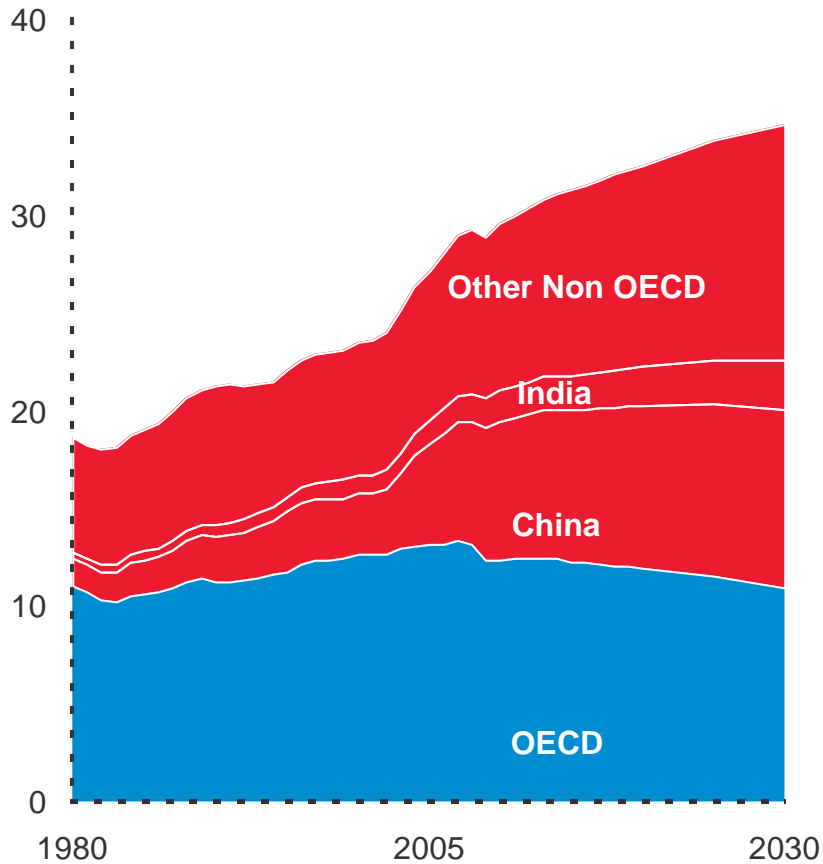


Energy-Related CO₂ Emissions



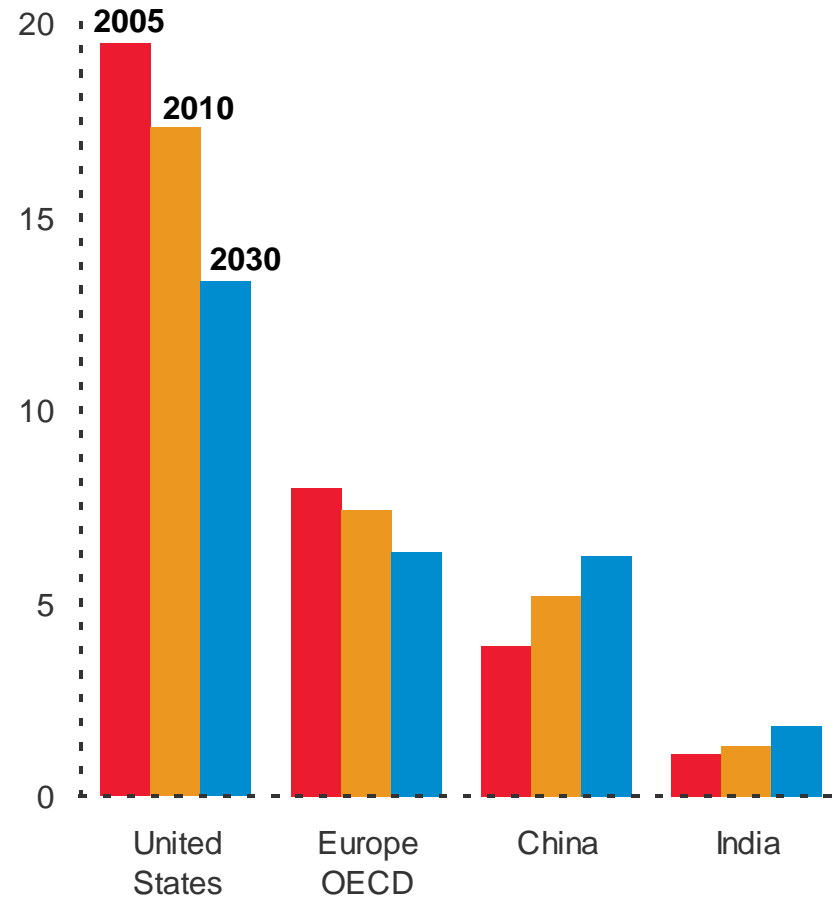
By Region

Billion Tons

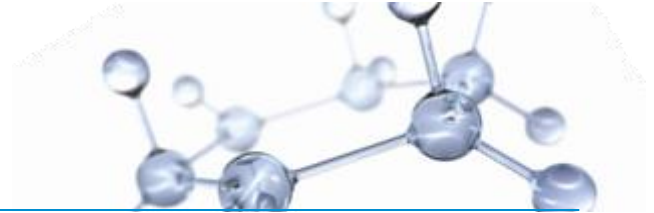


Emissions per Capita

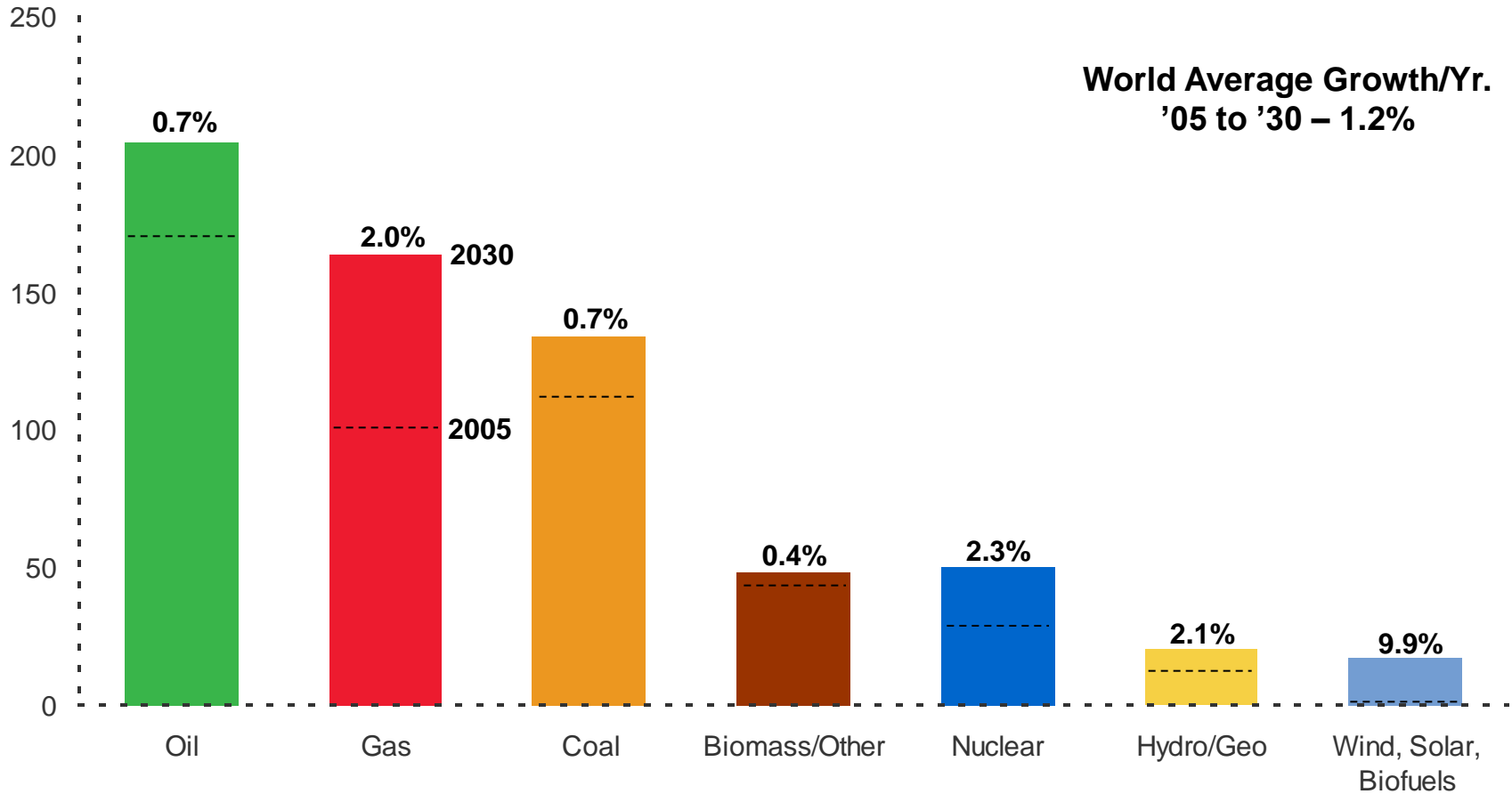
Tons per Person



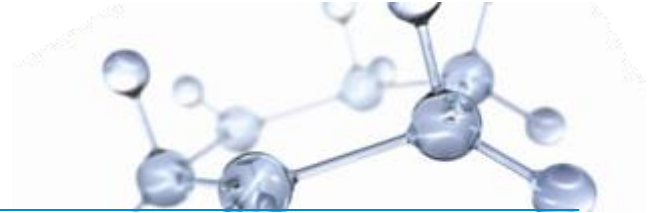
Global Demand by Fuel



Quadrillion BTUs

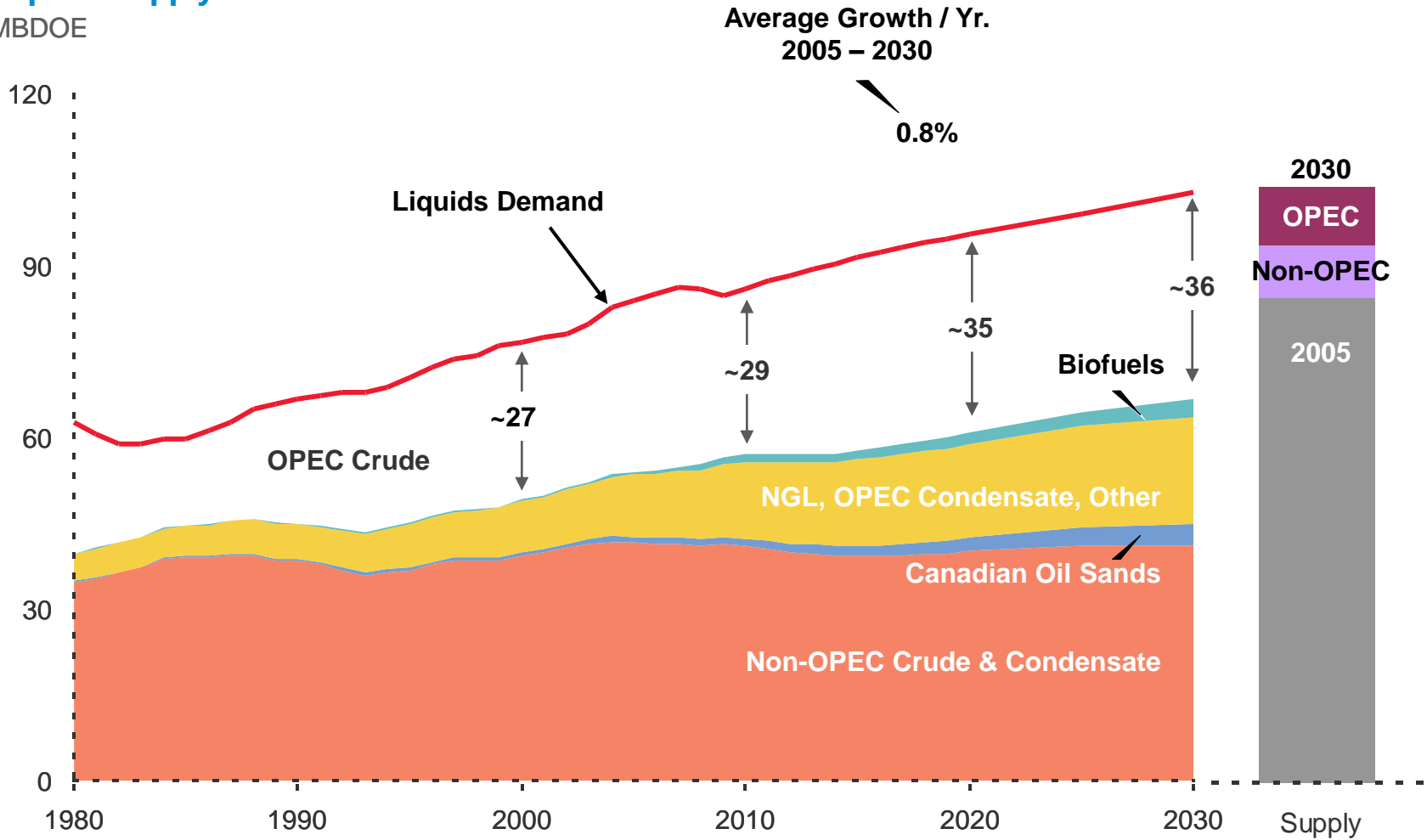


Global Liquids

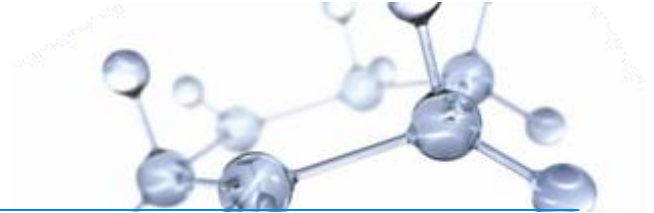


Liquids Supply

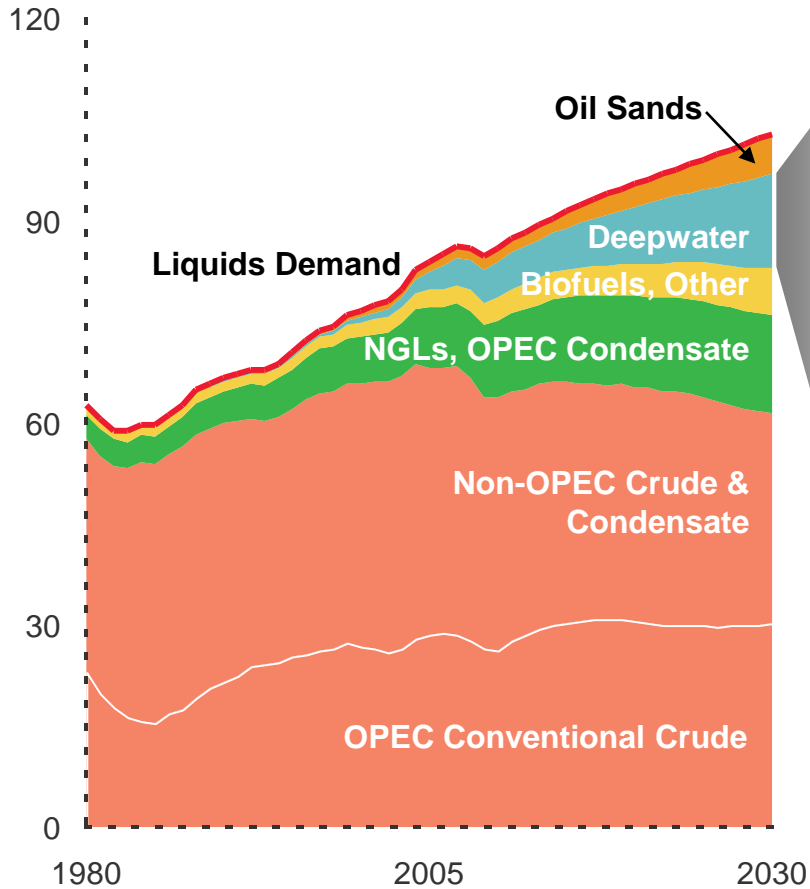
MBDOE



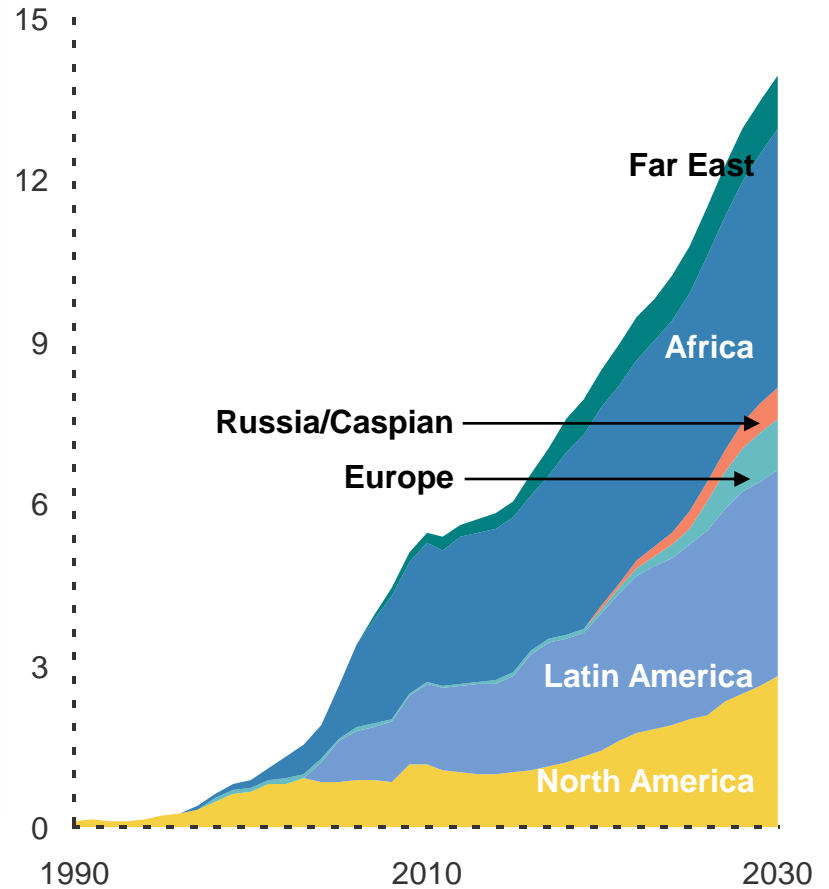
Deepwater Supply Expands Globally



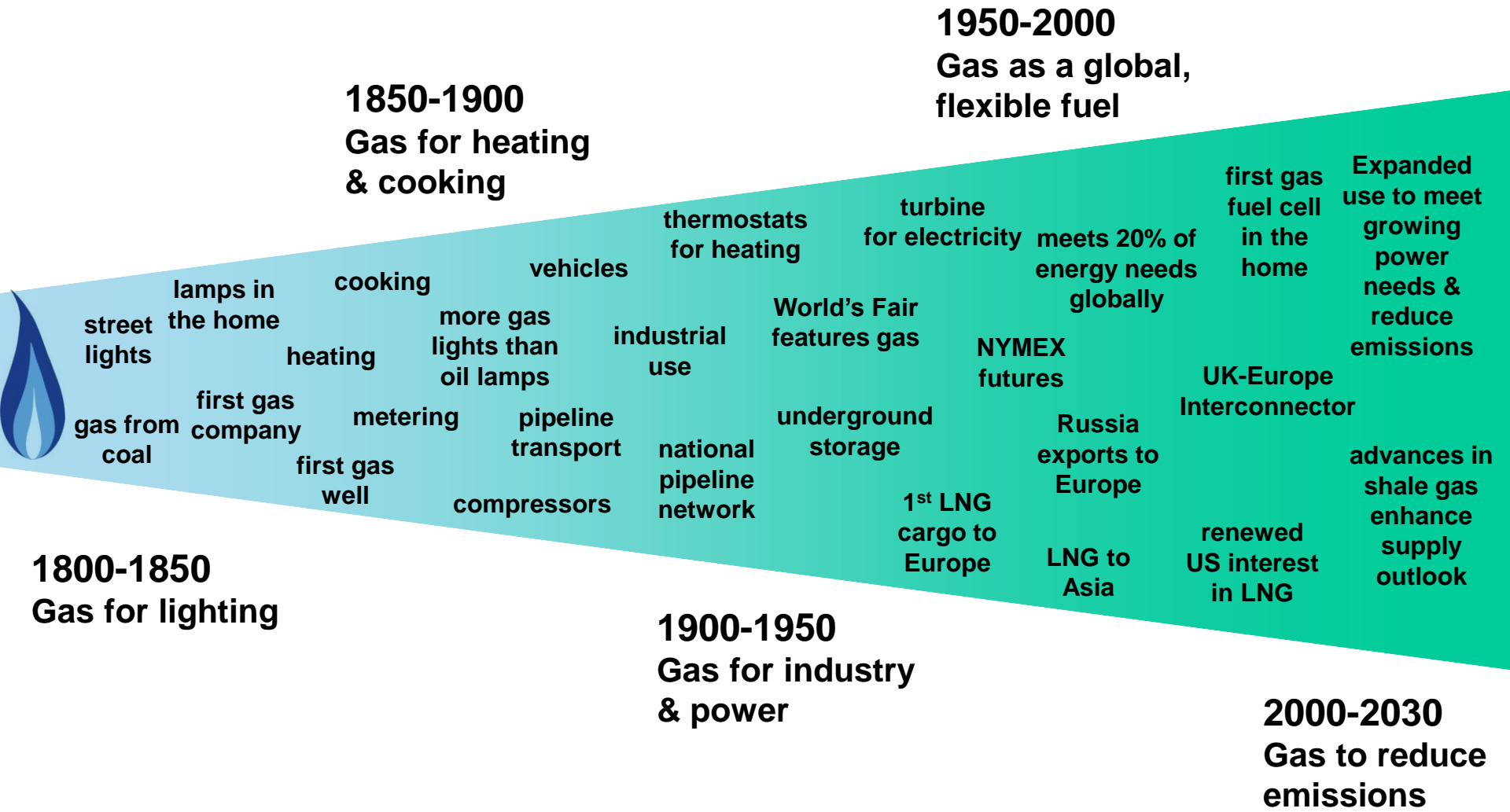
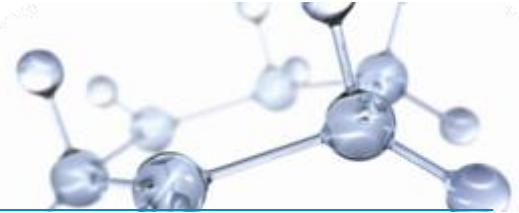
Global
MBDOE



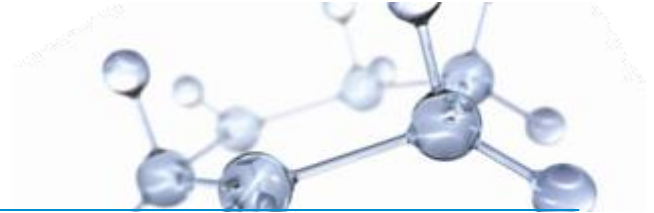
By Region
MBDOE



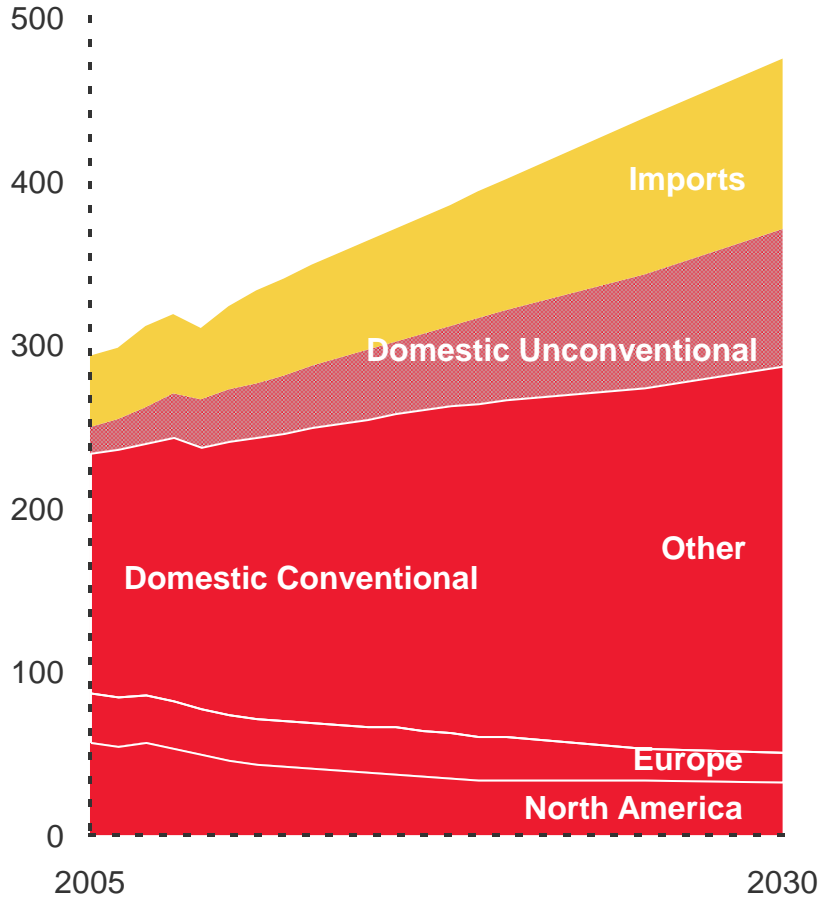
Natural Gas Adapts to Growing Needs



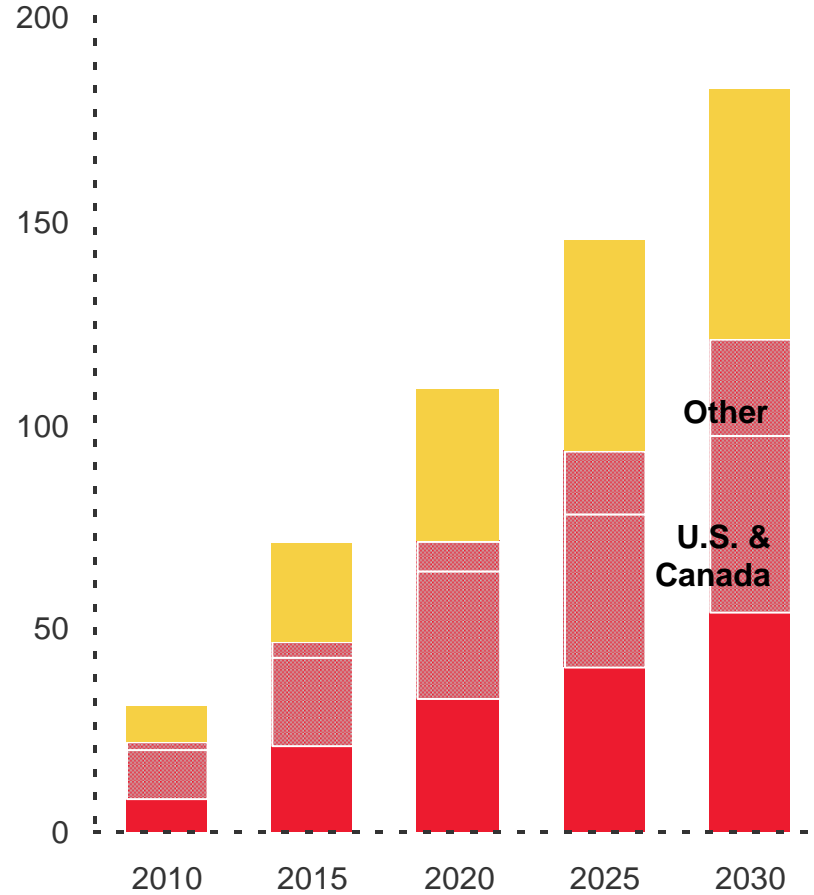
Global Natural Gas



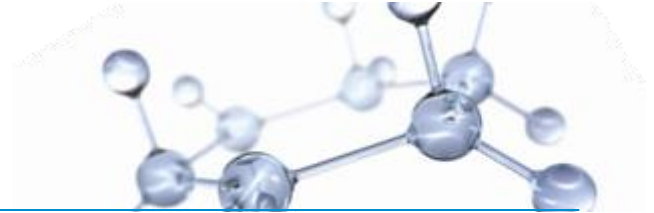
Supply
BCFD



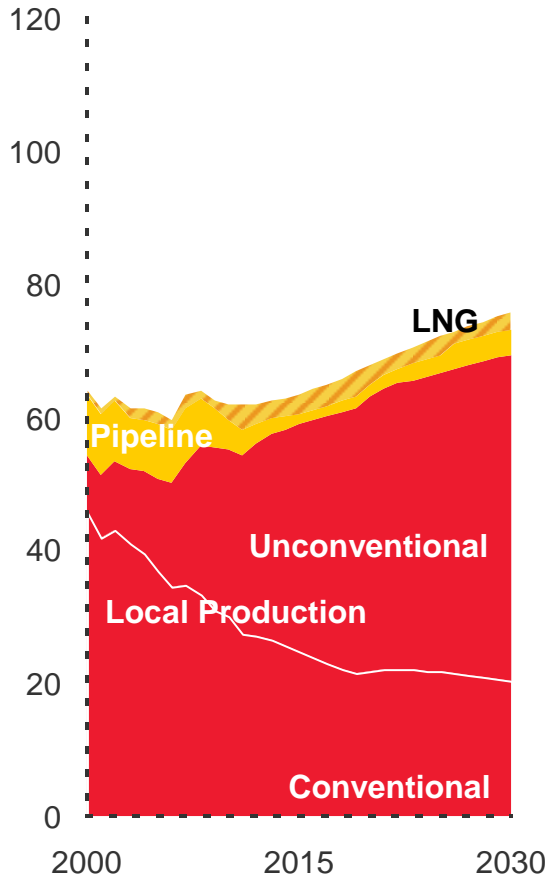
Growth 2005 to 2030
BCFD



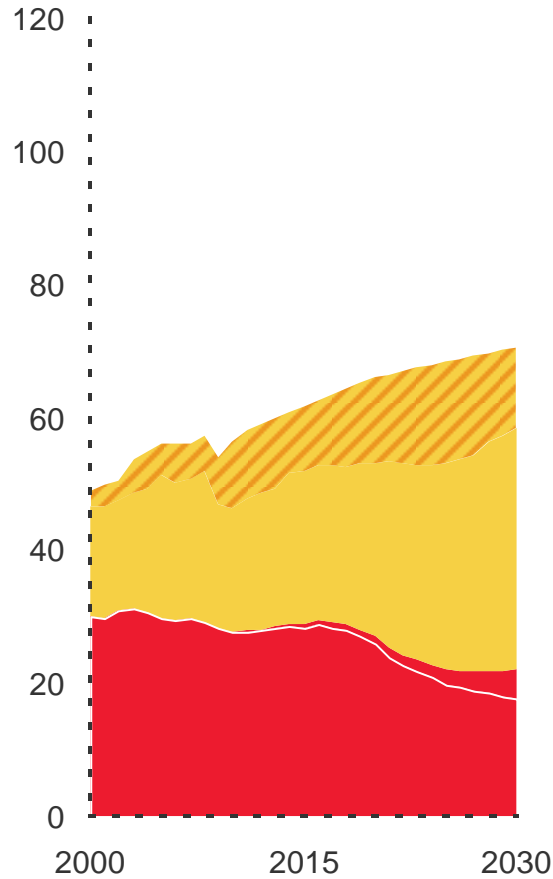
Gas Supply Grows and Diversifies



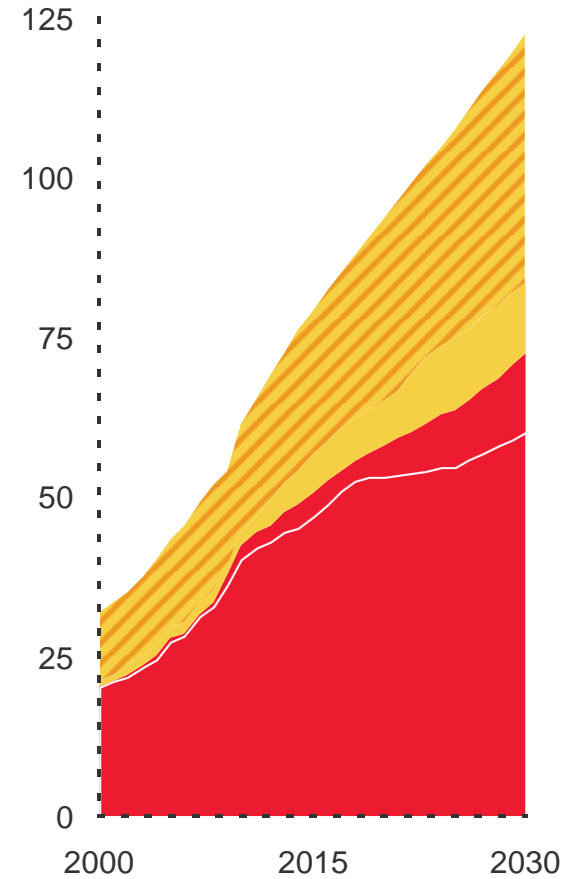
United States
BCFD



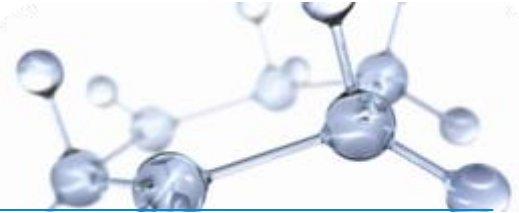
Europe
BCFD



Asia Pacific
BCFD

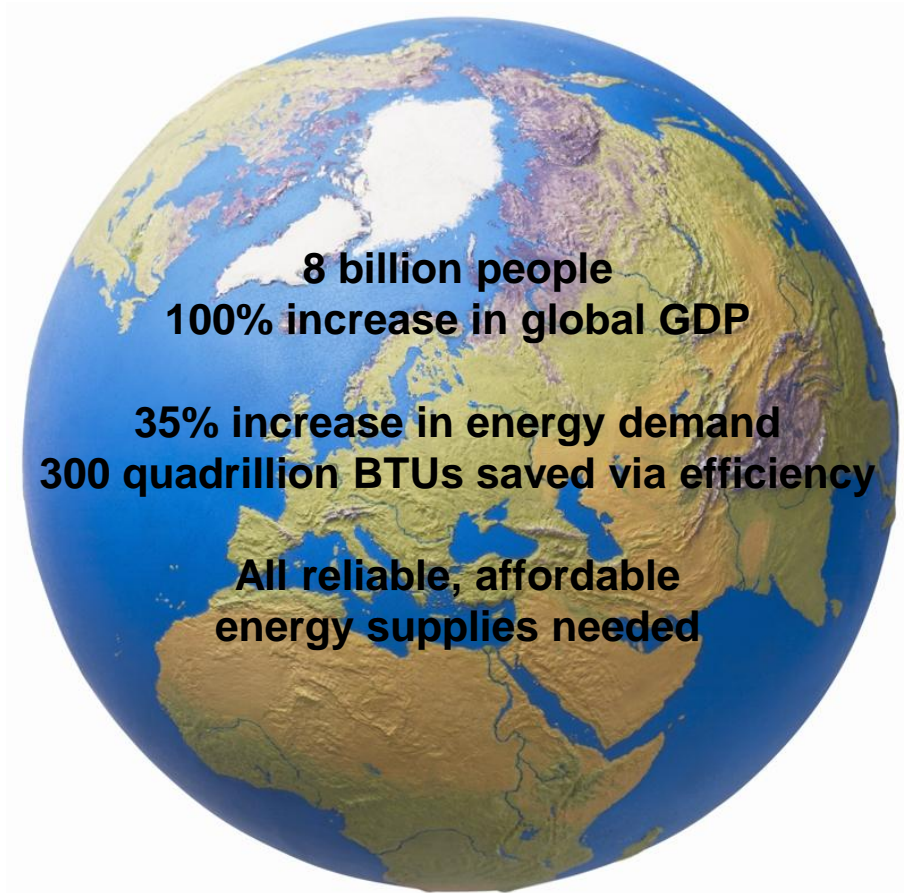


Development Challenges and Solutions



World development continues, while lives improve and economies grow

Increase
Efficiency



8 billion people
100% increase in global GDP

35% increase in energy demand
300 quadrillion BTUs saved via efficiency

All reliable, affordable
energy supplies needed

Mitigate
Emissions

Expand
Supplies



ExxonMobil™