

ExxonMobil

Taking on the world's toughest energy challenges.™

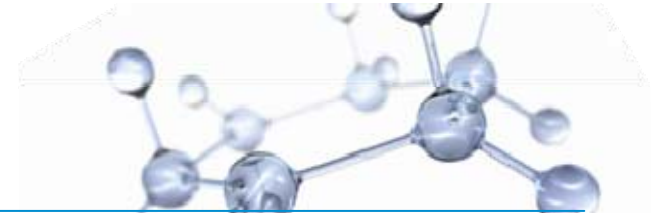
the outlook for energy: a view to 2030

Todd Onderdonk
2009 STI/SPFA Fall Conference
September 24, 2009

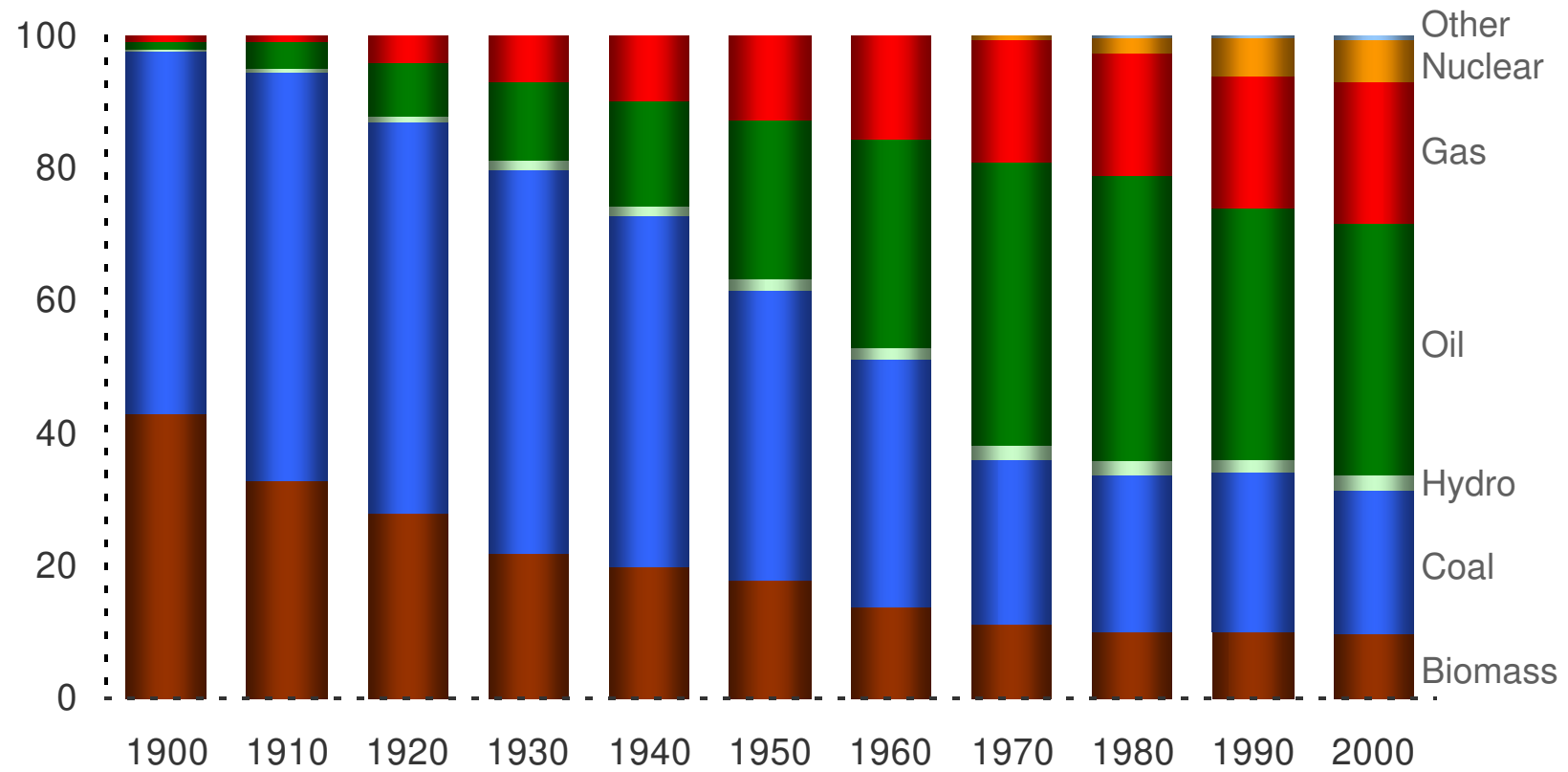


This presentation includes forward-looking statements. Actual future conditions (including economic conditions, energy demand, and energy supply) could differ materially due to changes in technology, the development of new supply sources, political events, demographic changes, and other factors discussed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

evolving energy sources



percent of total



the outlook for energy



100 countries



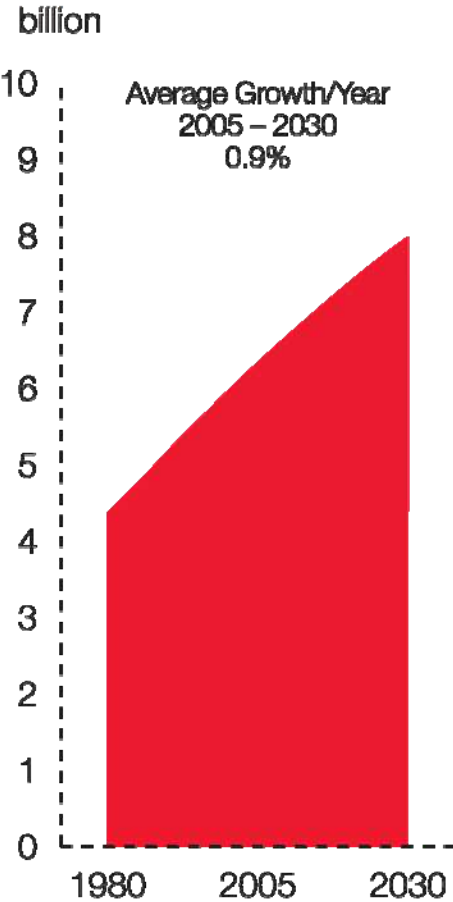
15 demand sectors

20 fuel types

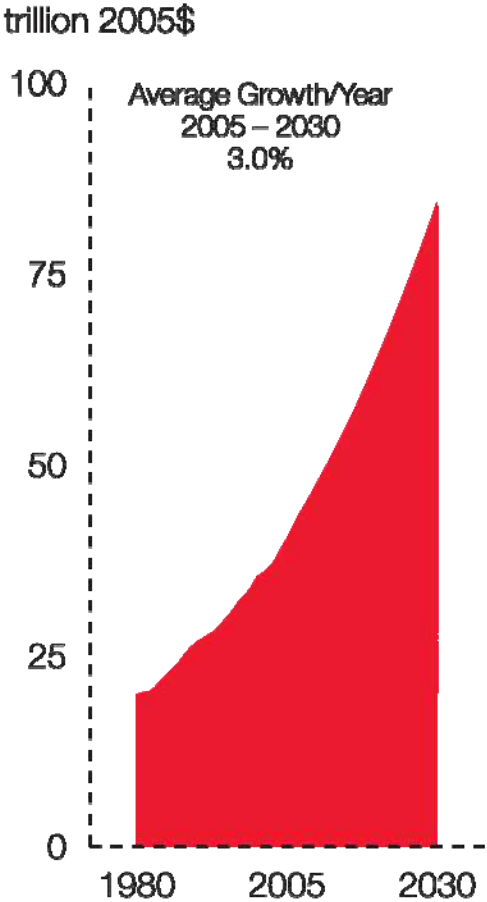
global economics and energy



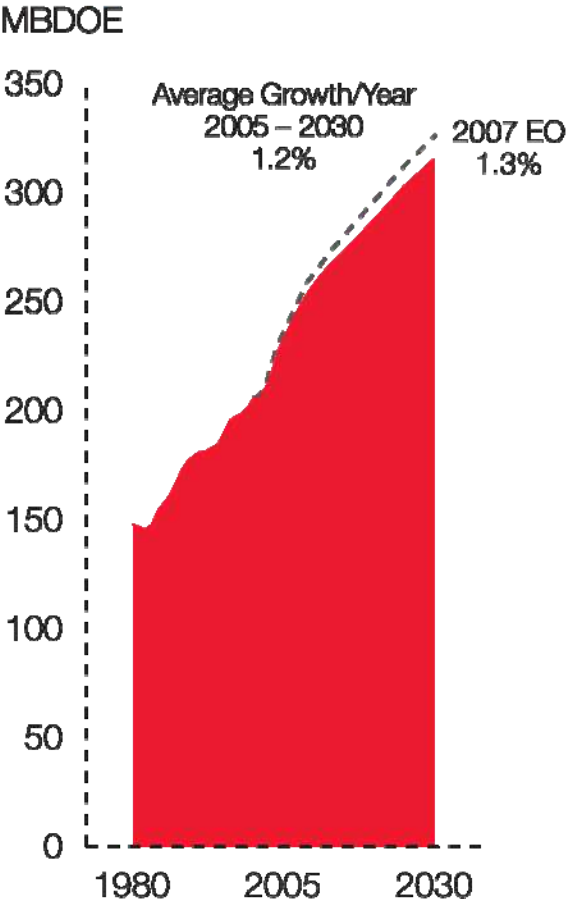
population



GDP



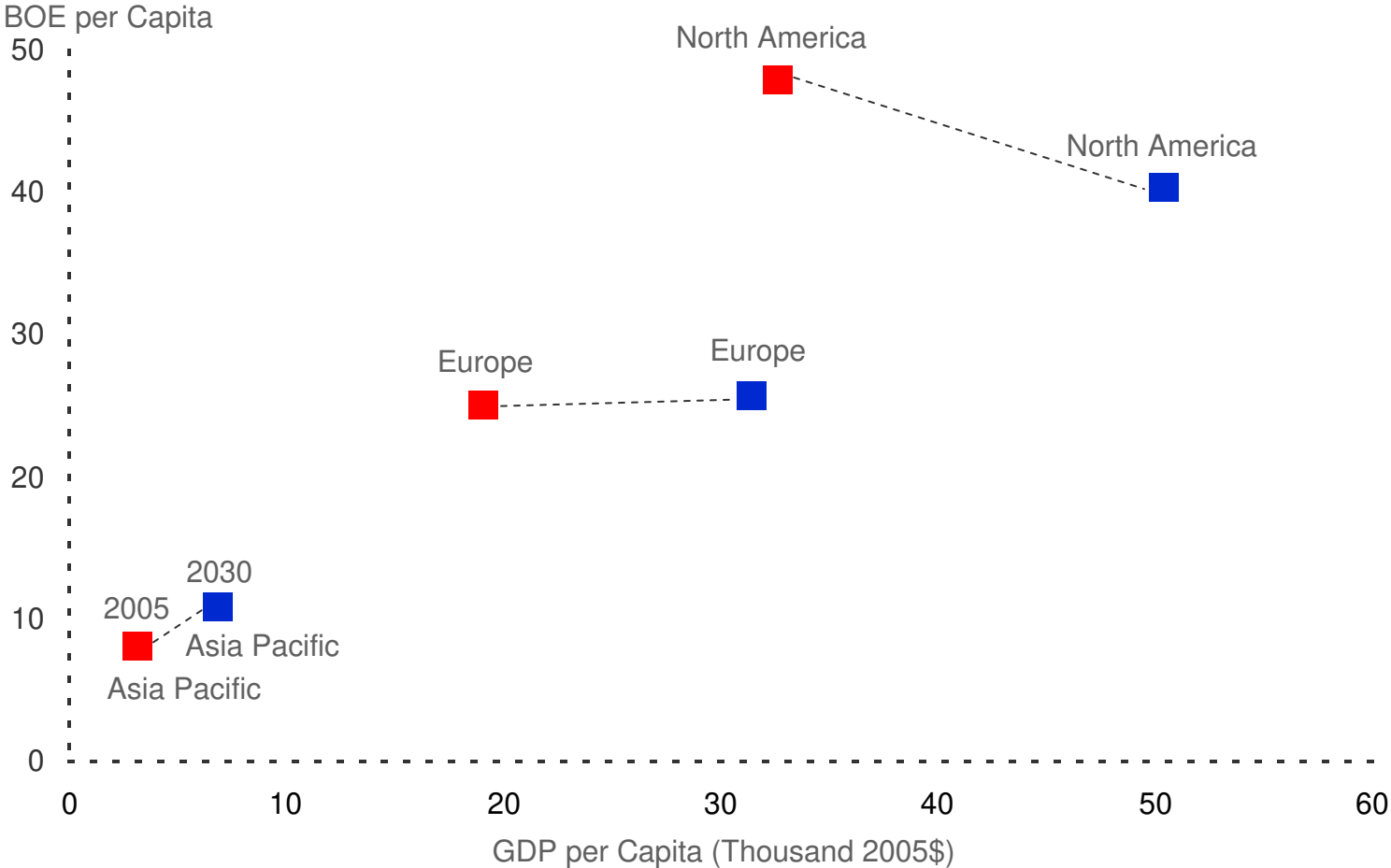
energy demand



energy demand vs. income



energy demand vs. income

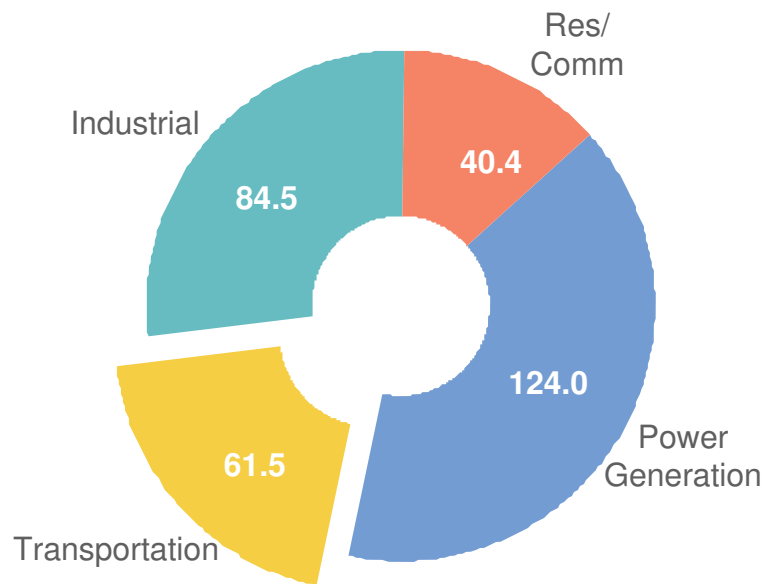


global – transportation



global transportation

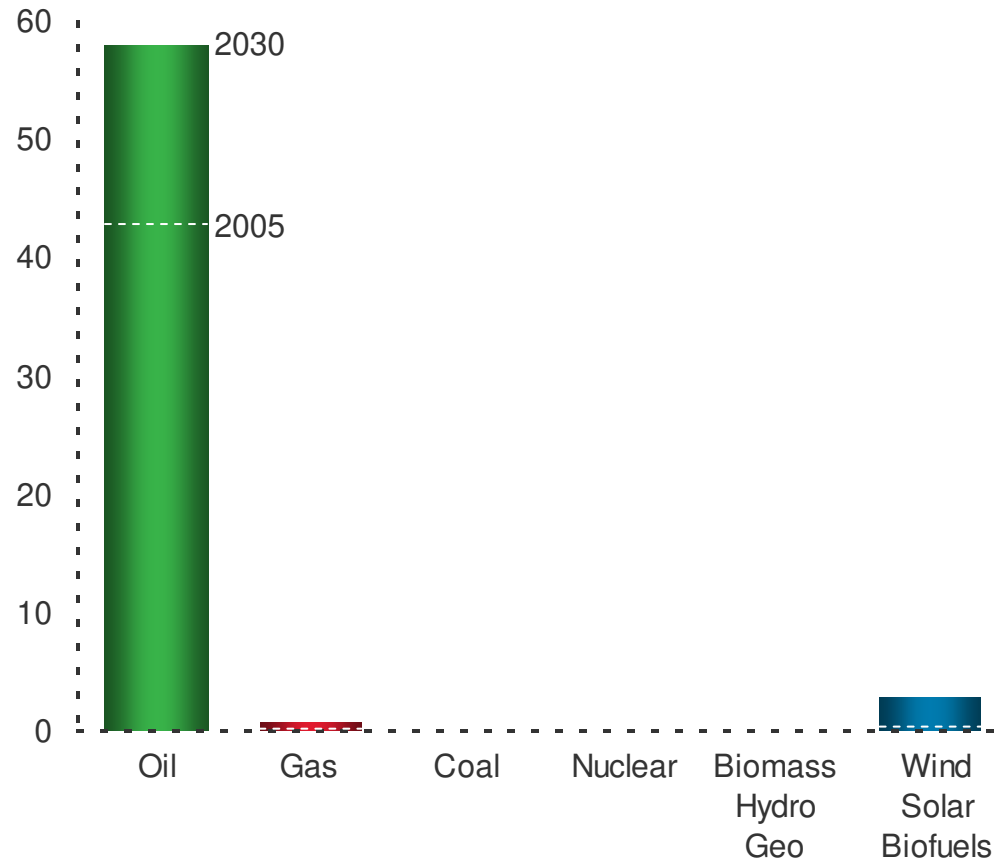
by sector
MBDOE



2030: ~310 MBDOE

global transportation

by fuel
MBDOE



Average Growth / Yr.
2005 – 2030
1.4%

global – transportation

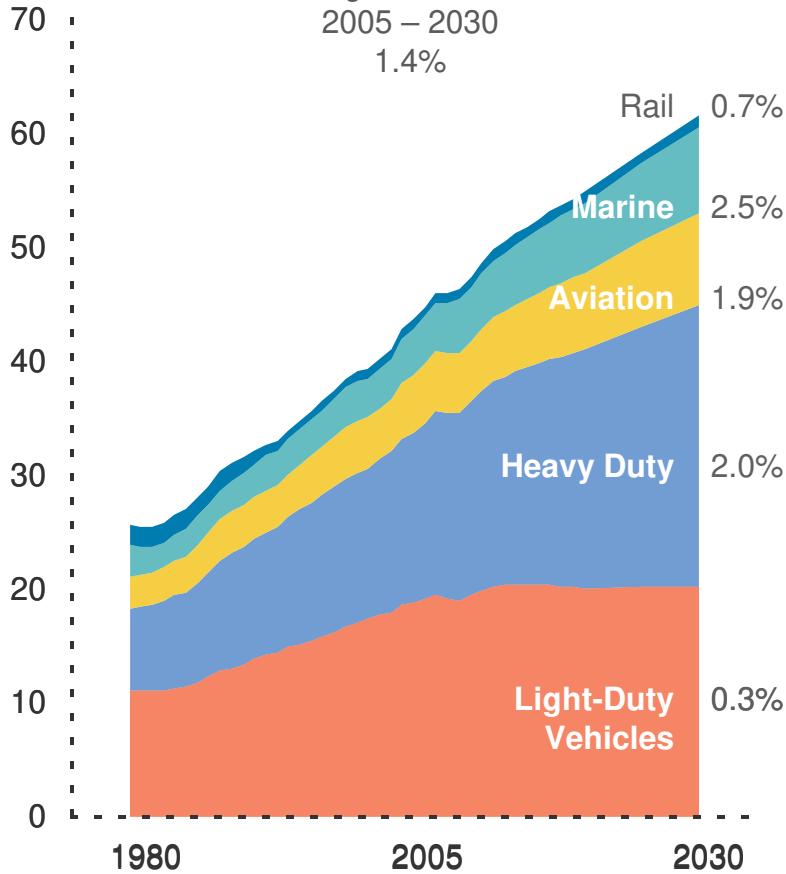


global transportation

by sector

MBDOE

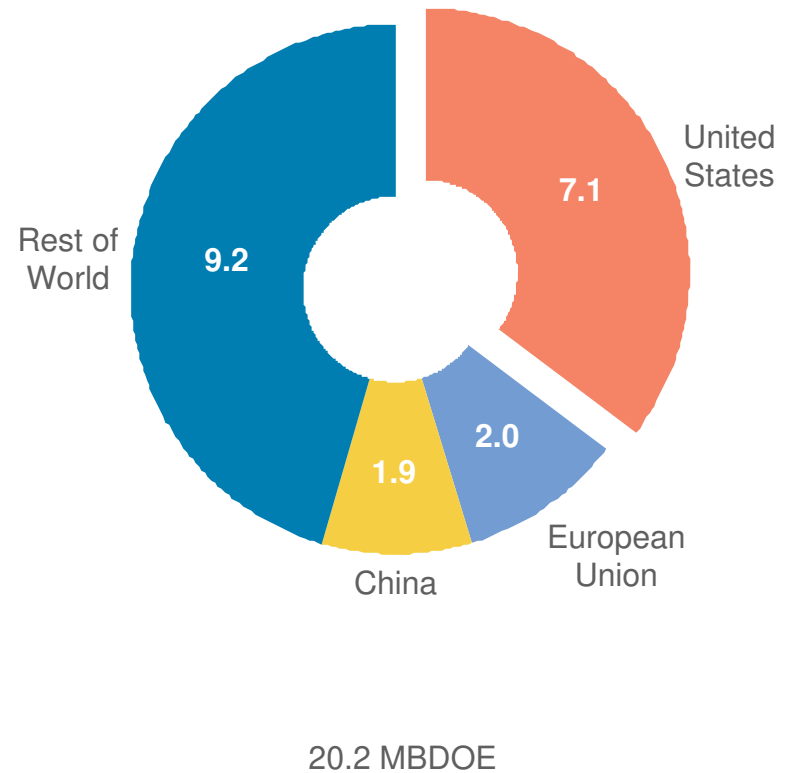
Average Growth / Yr.
2005 – 2030
1.4%



2030 - LDV fuel demand

by region

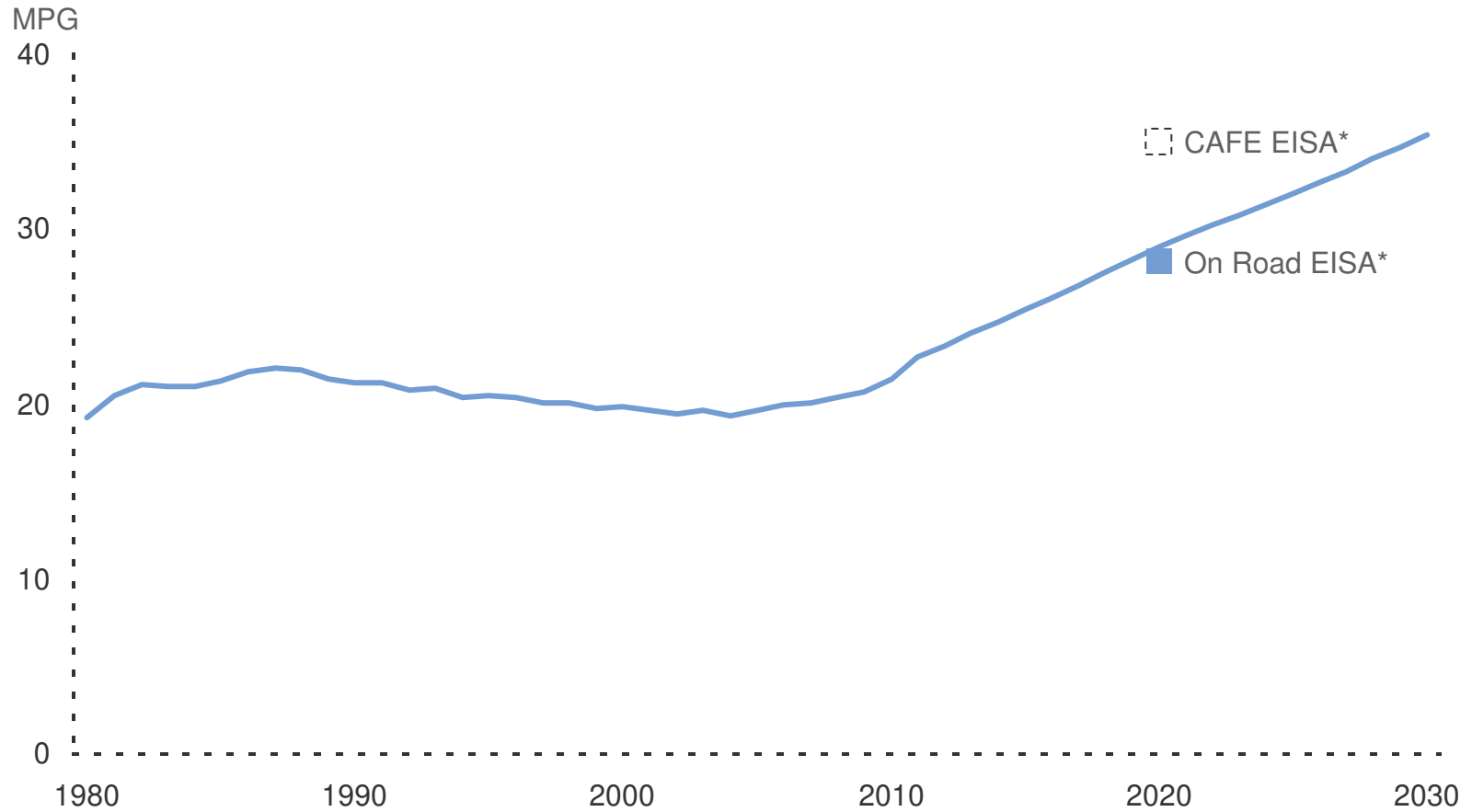
MBDOE



U.S. new light-duty vehicles



U.S. new light-duty vehicle MPG



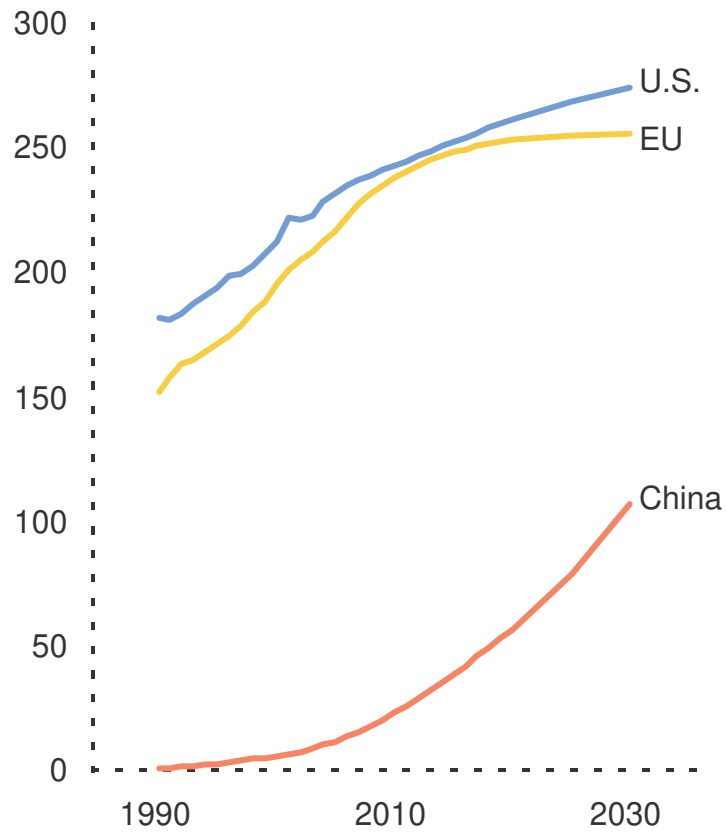
*EISA – Energy Independence and Security Act

light-duty vehicles



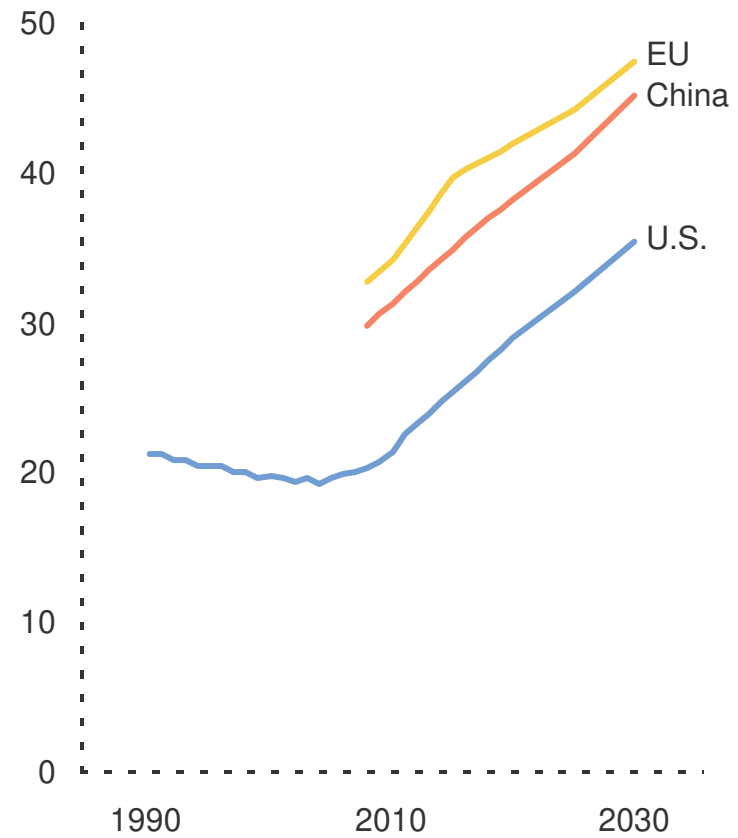
total fleet size

millions of vehicles



new vehicle mpg

miles / gallon

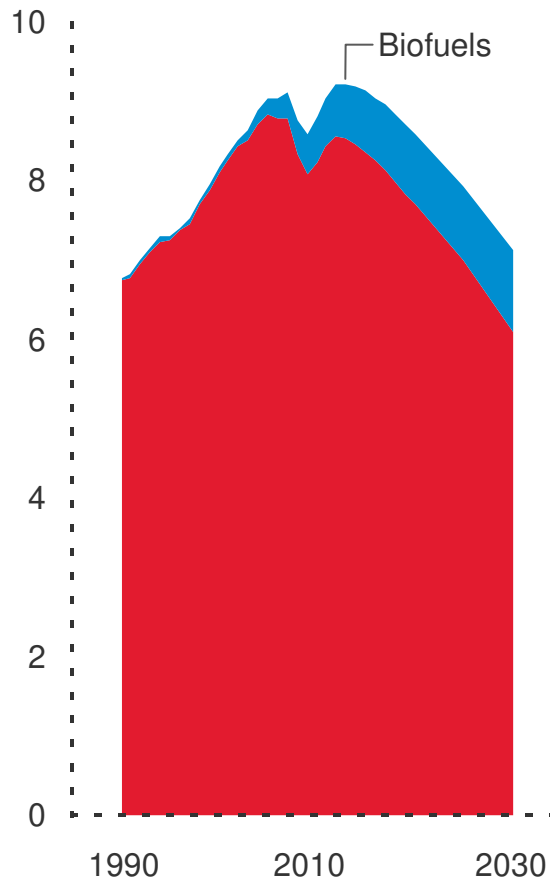


light-duty-vehicle fuel demand



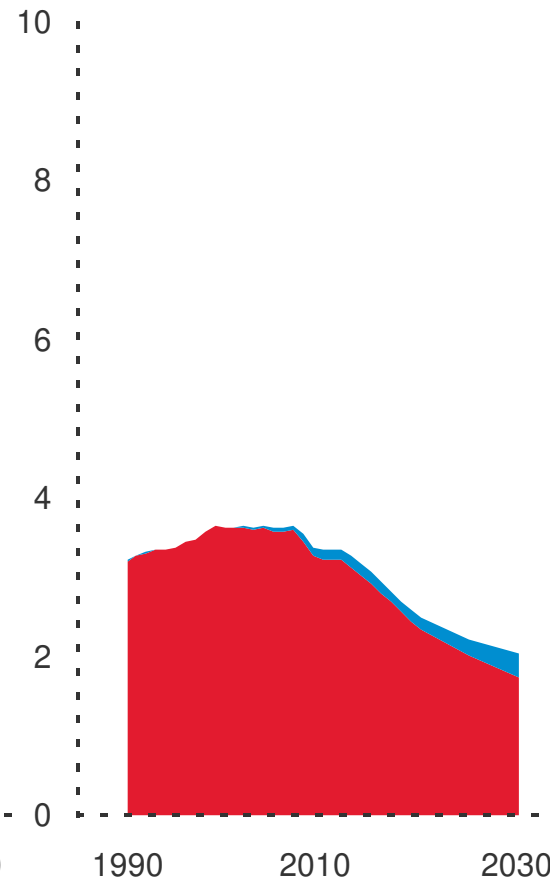
United States

MBDOE



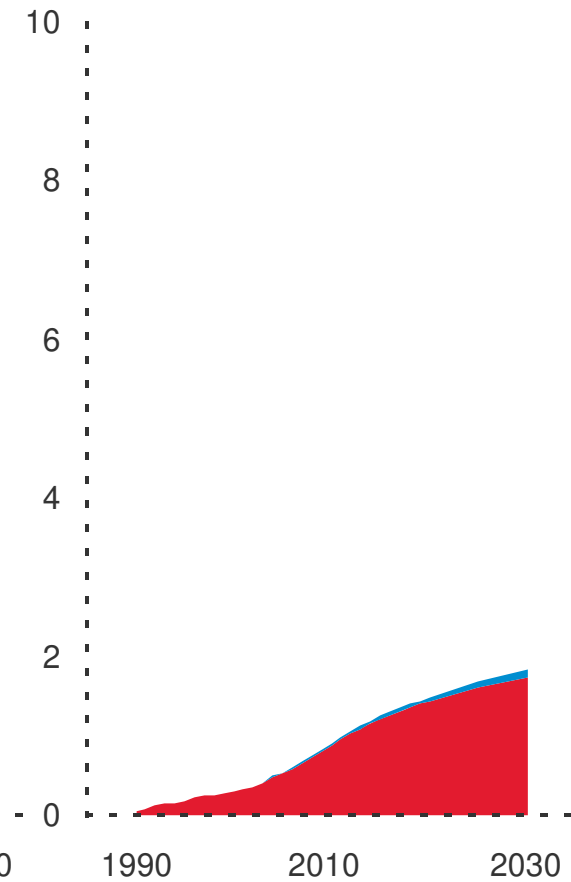
European Union

MBDOE

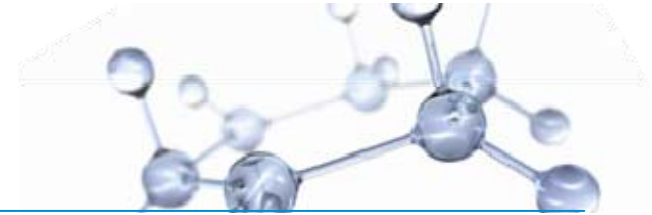


China

MBDOE



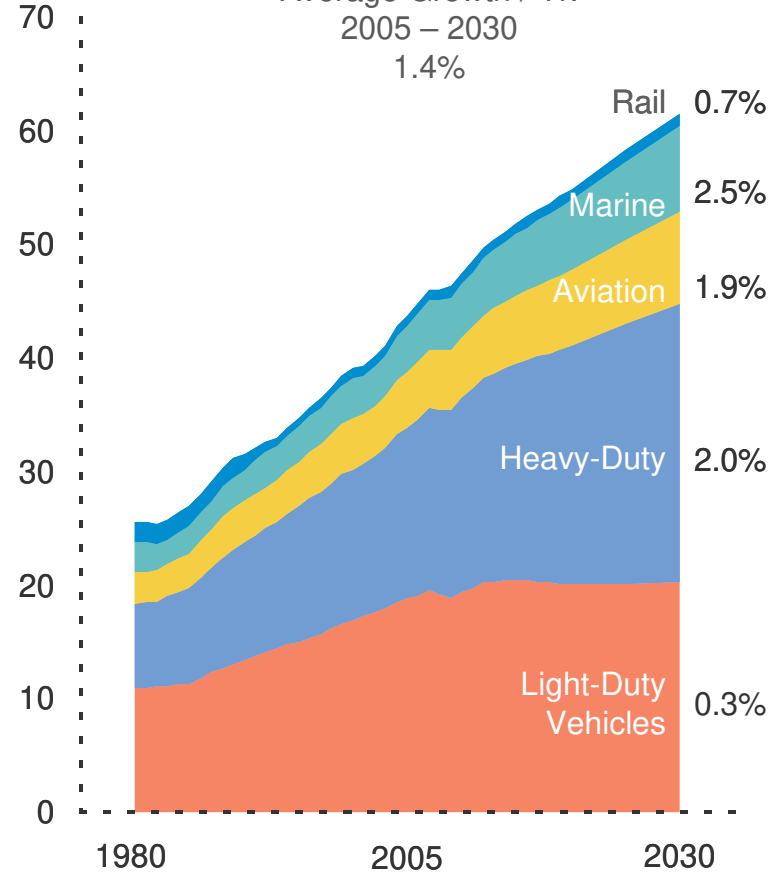
global commercial transportation



global commercial transportation

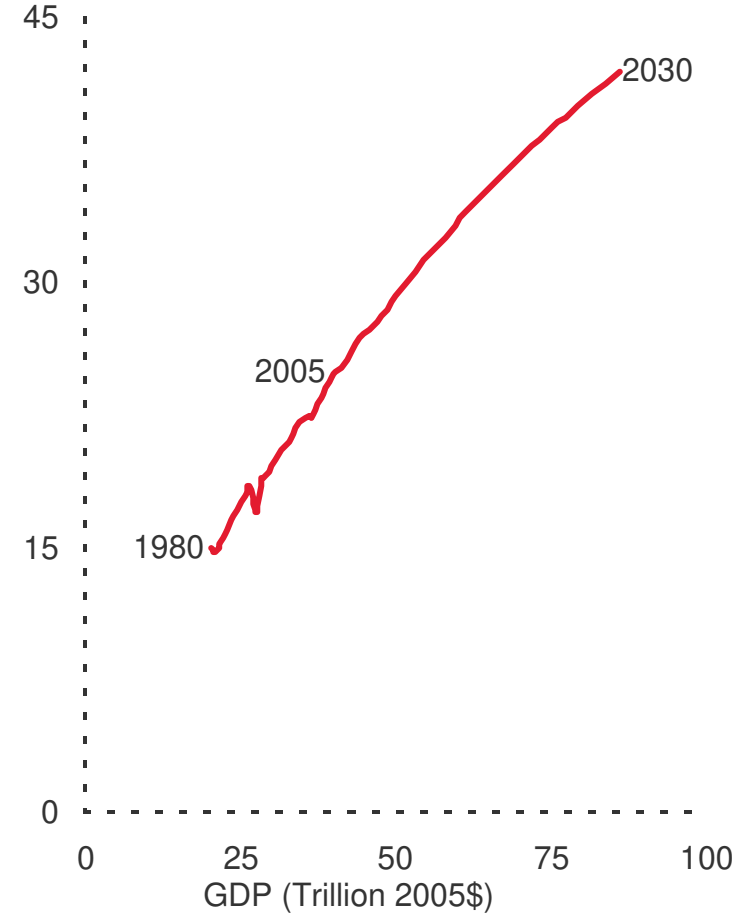
by sector

MBDOE

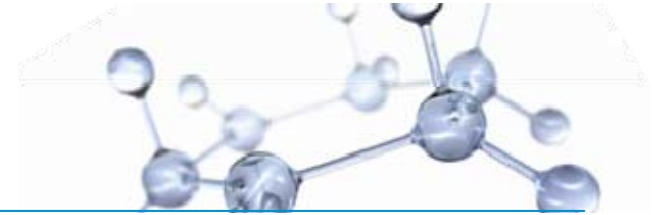


commercial transportation v. GDP

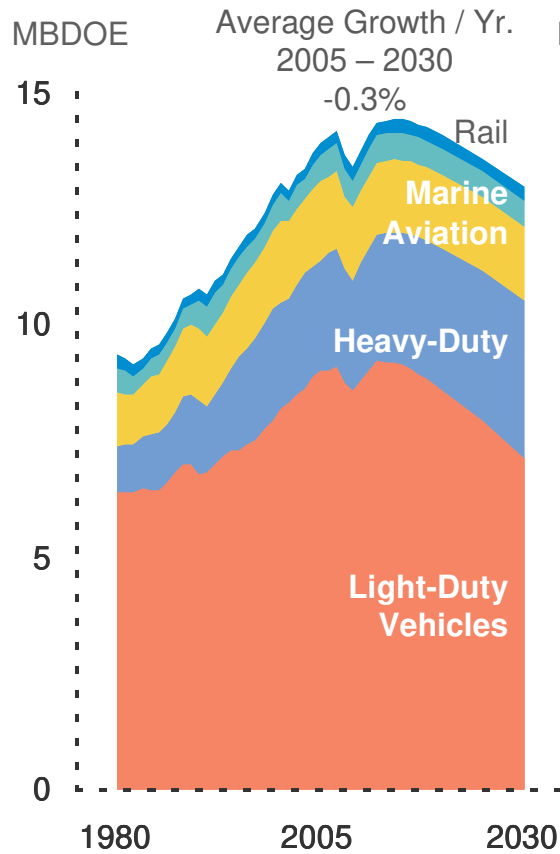
MBDOE



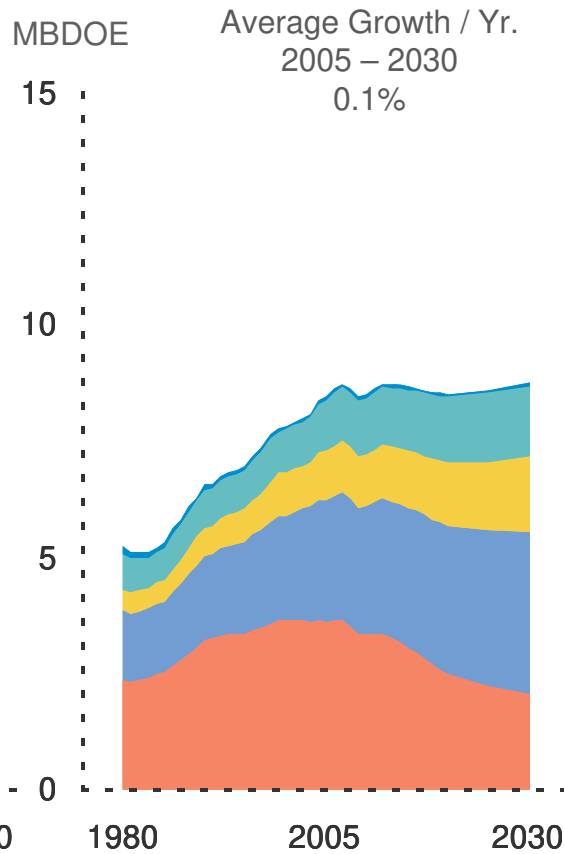
transportation by sector



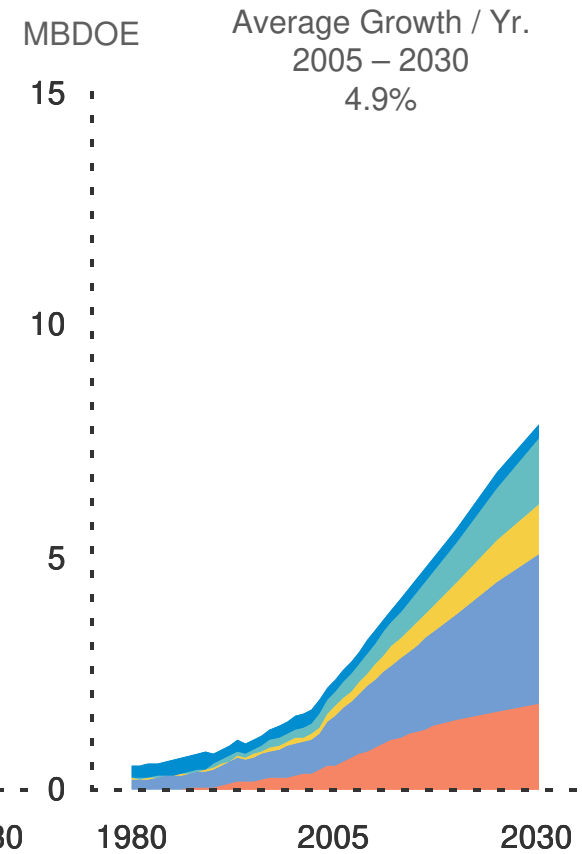
United States



European Union



China

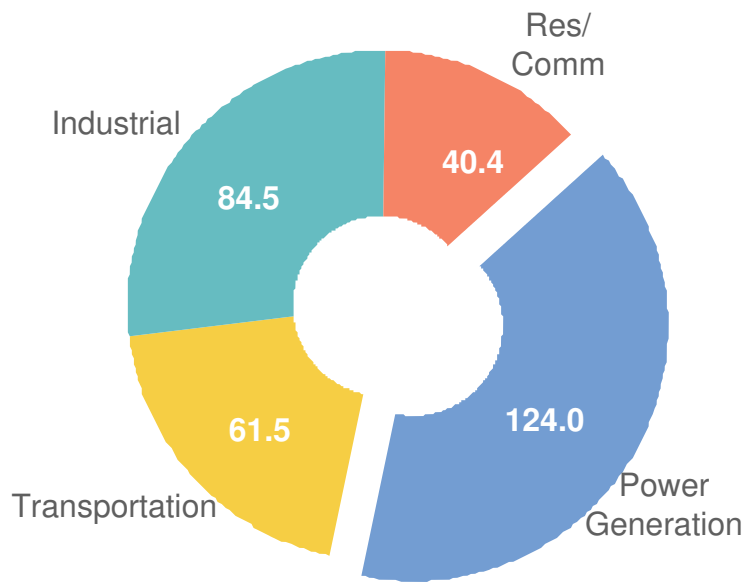


global – power generation



global power generation

by sector
MBDOE

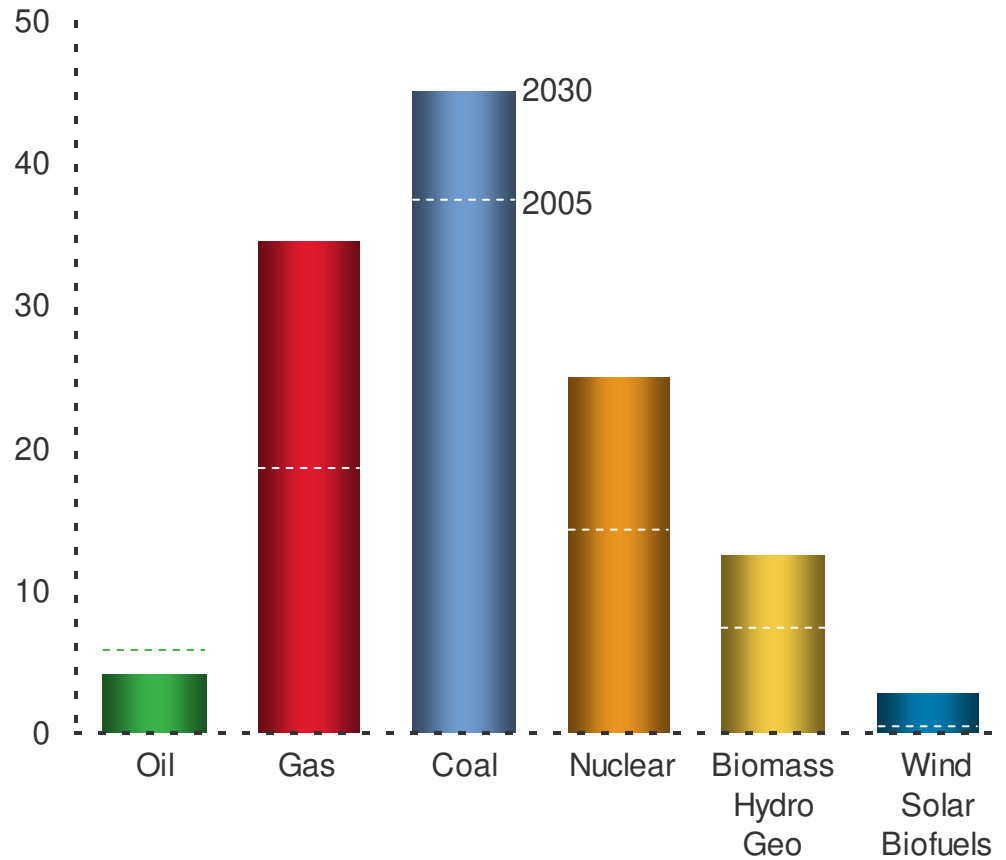


2030: ~310 MBDOE

global power generation

by fuel
MBDOE

Average Growth / Yr.
2005 – 2030
1.6%

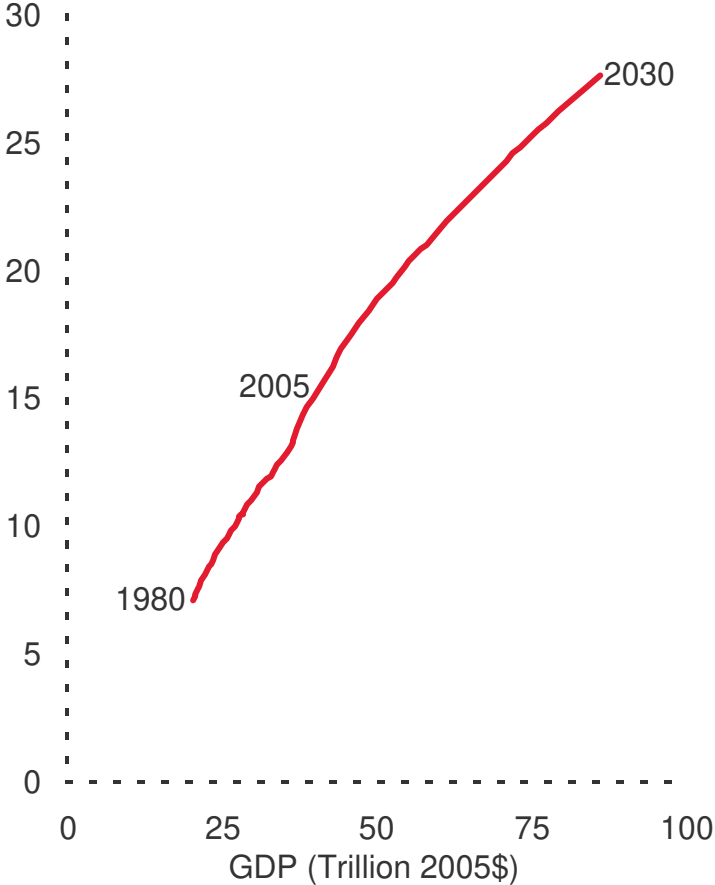


global power generation



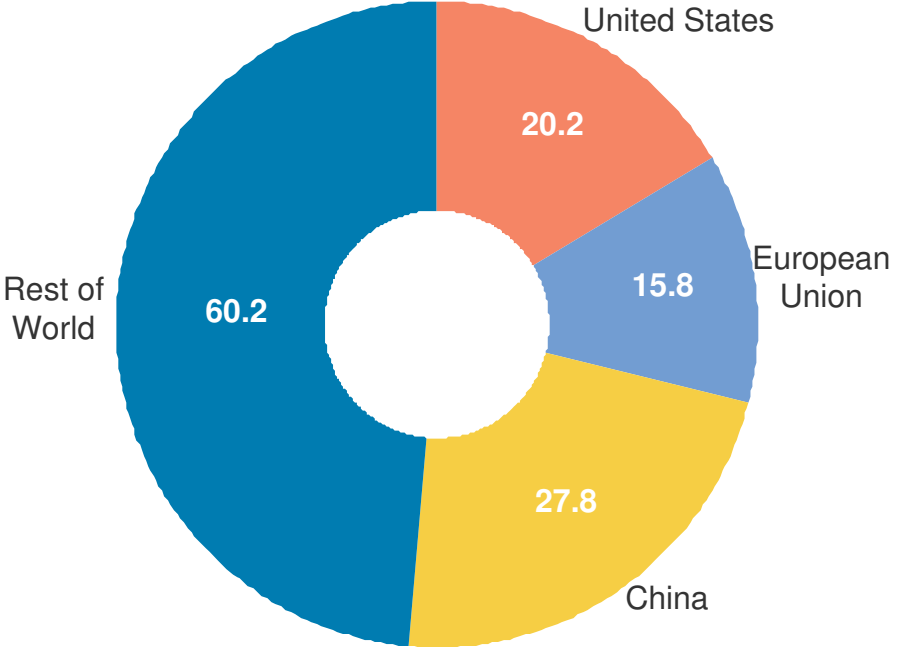
global electricity use

electricity demand v. GDP
K Terawatt hours



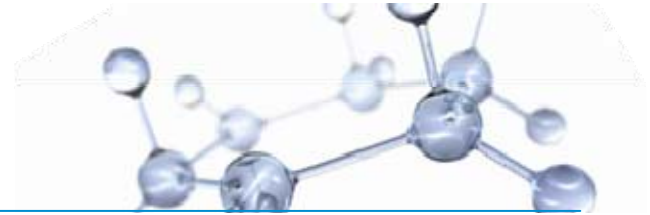
global power generation fuel demand

by region
MBDOE



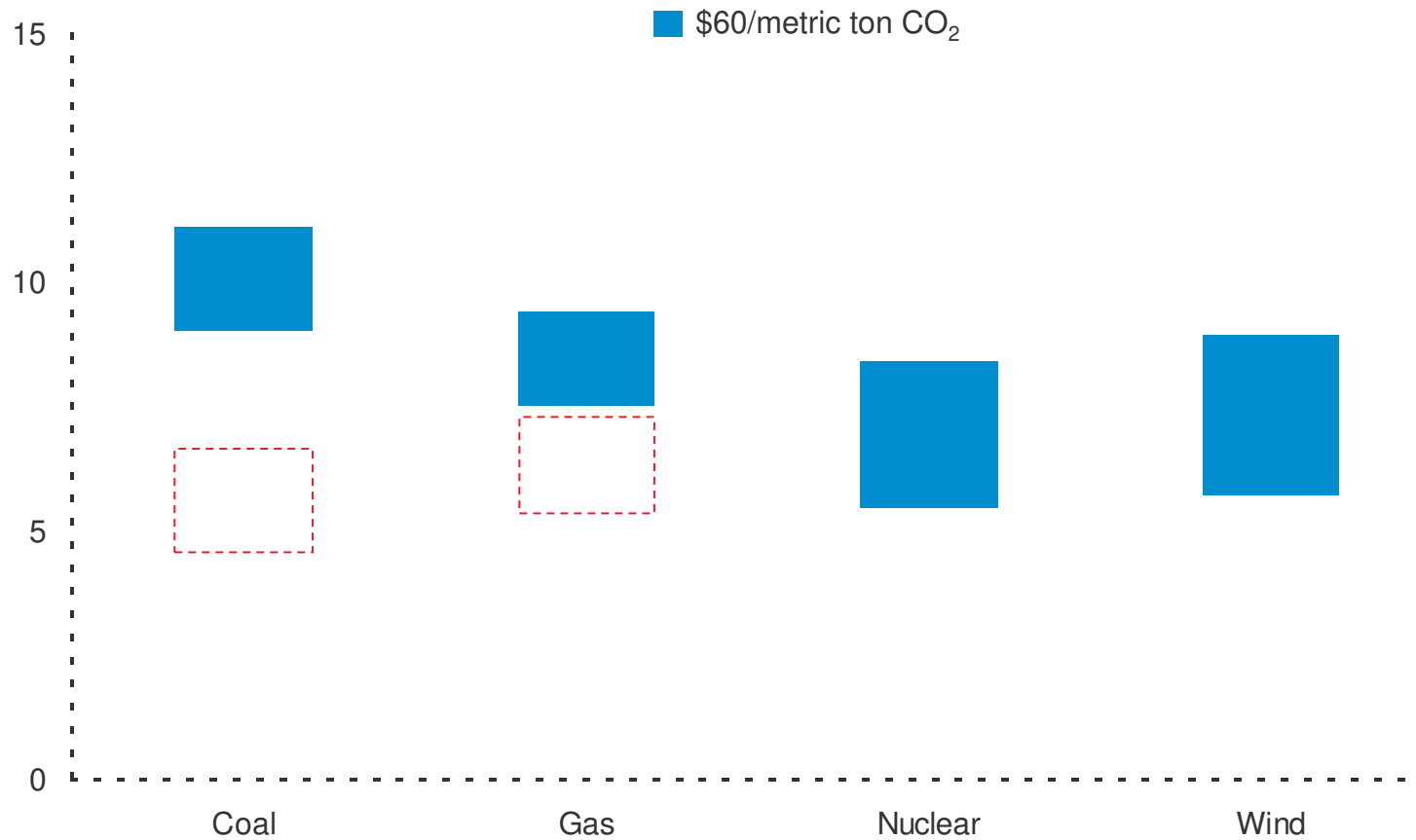
2030: ~124 MBDOE

United States power generation cost



United States power generation cost

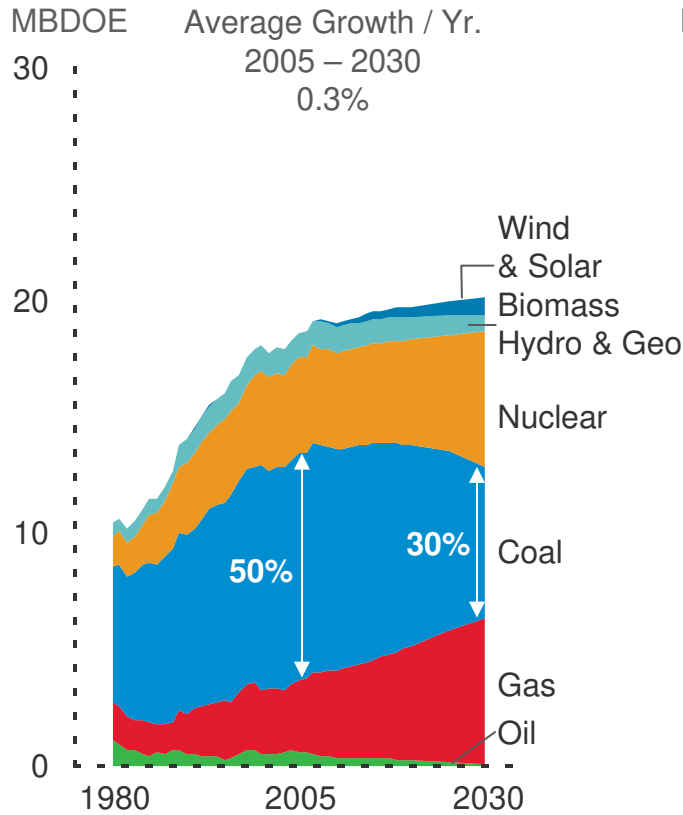
U.S. baseload, startup 2025
2005 cents/ kWhr



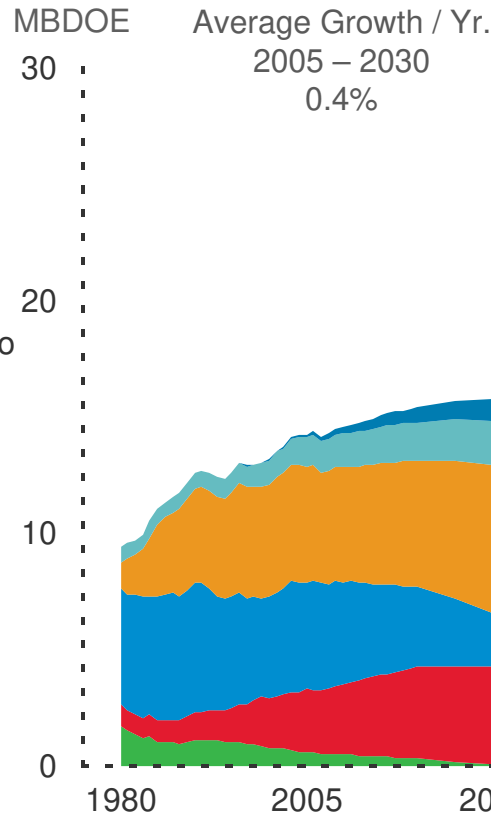
power generation by region



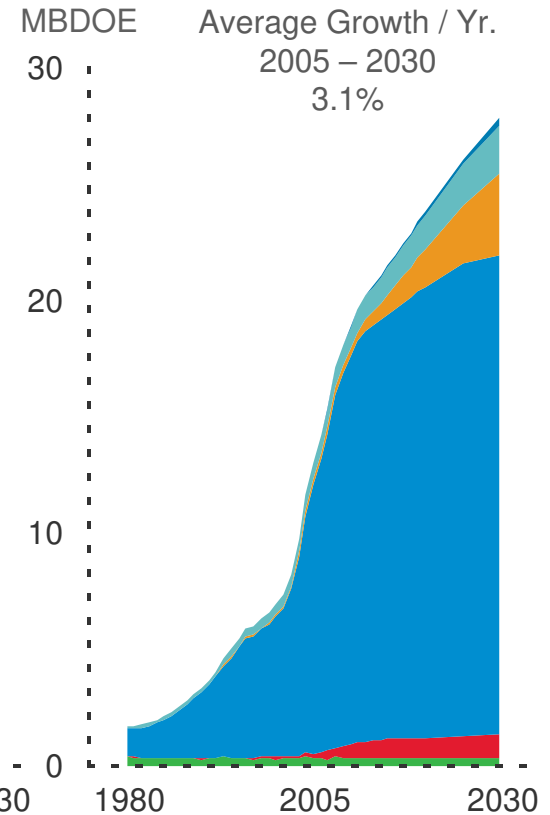
United States



European Union



China



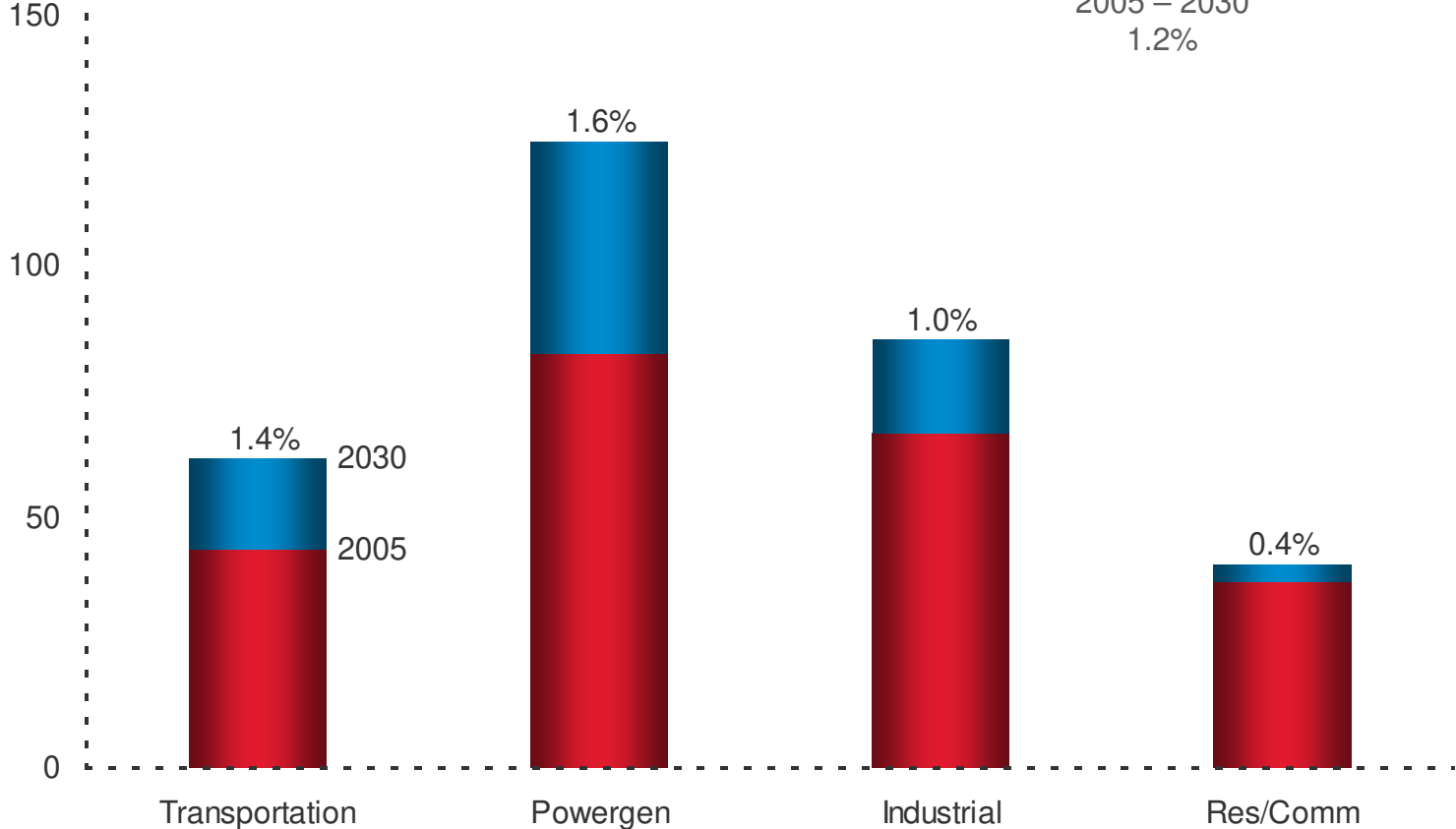
growing global energy demand by sector



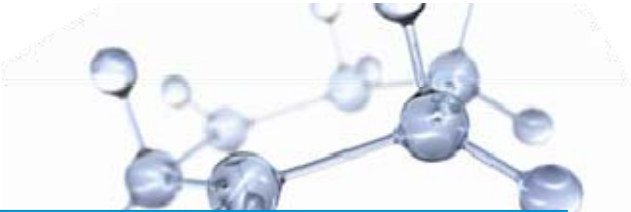
global energy demand

by sector

MBDOE

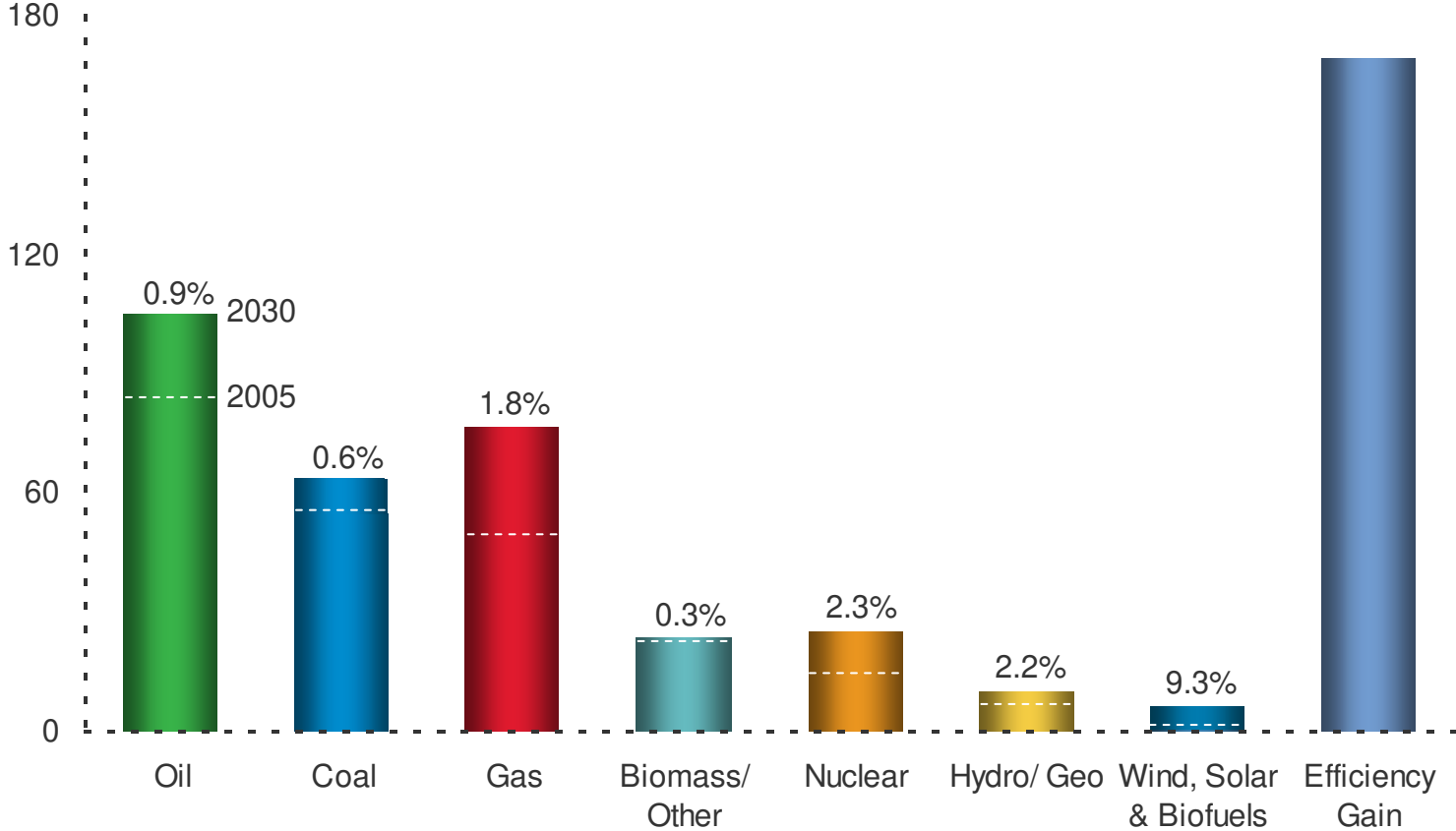


growing global energy demand



growing global energy demand

by fuel
MBDOE

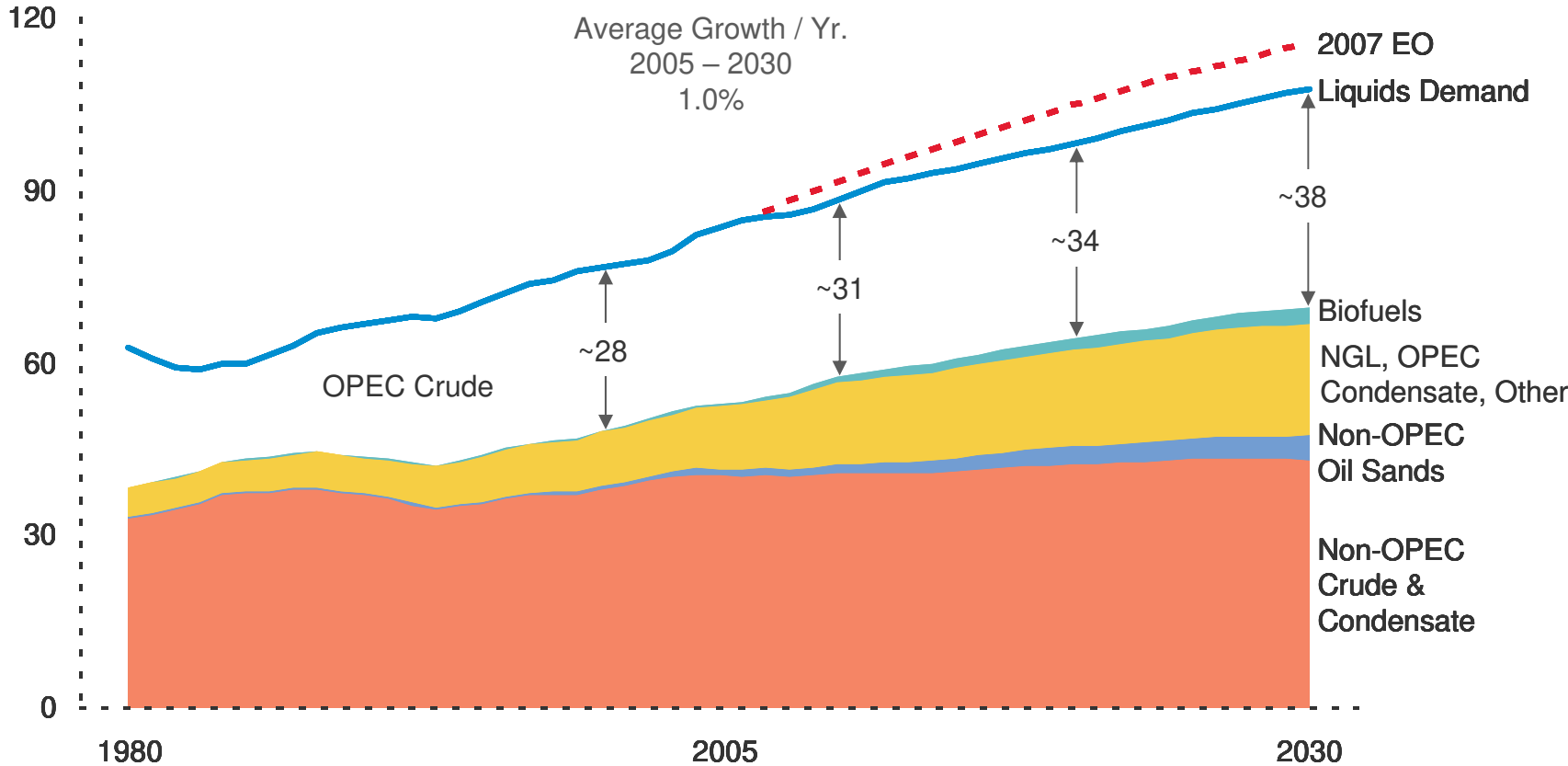


global liquids supply and demand



global liquids supply and demand

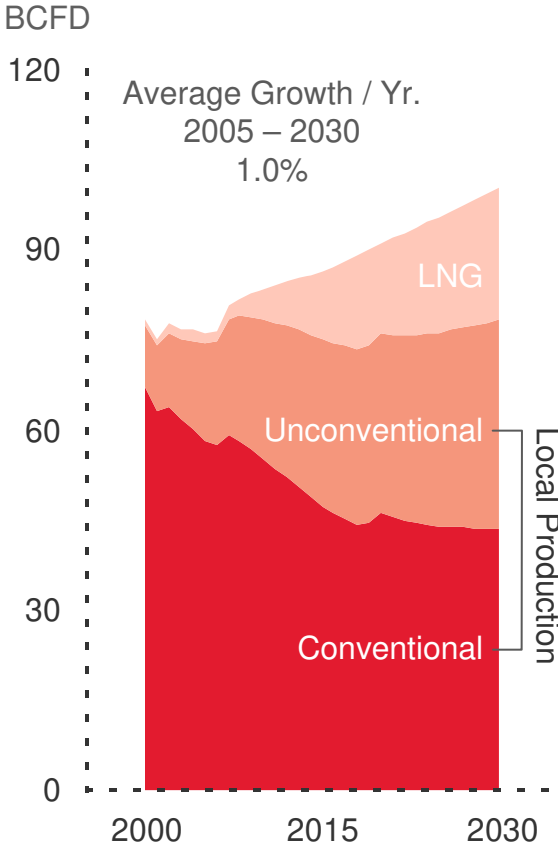
MBDOE



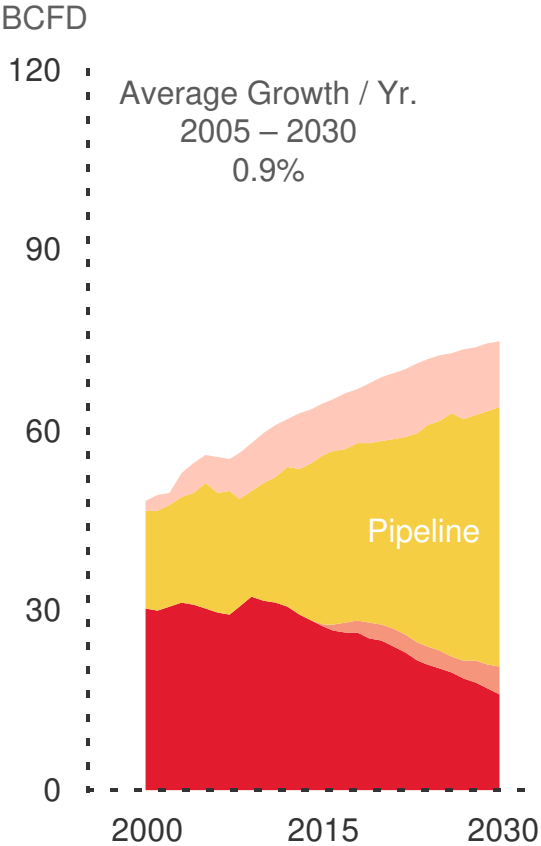
gas supply / demand balance



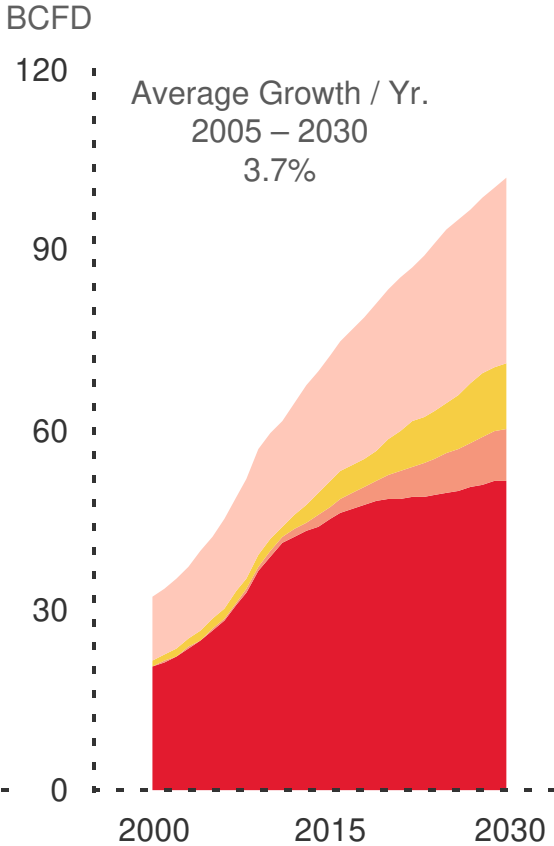
North America



Europe



Asia Pacific

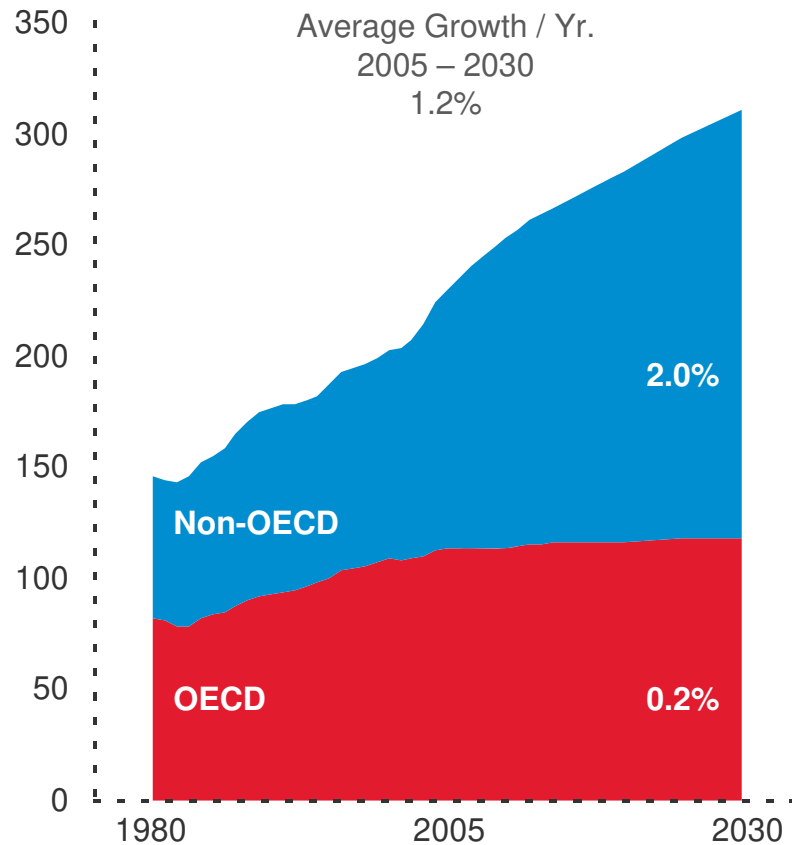


global energy demand & CO₂ emissions



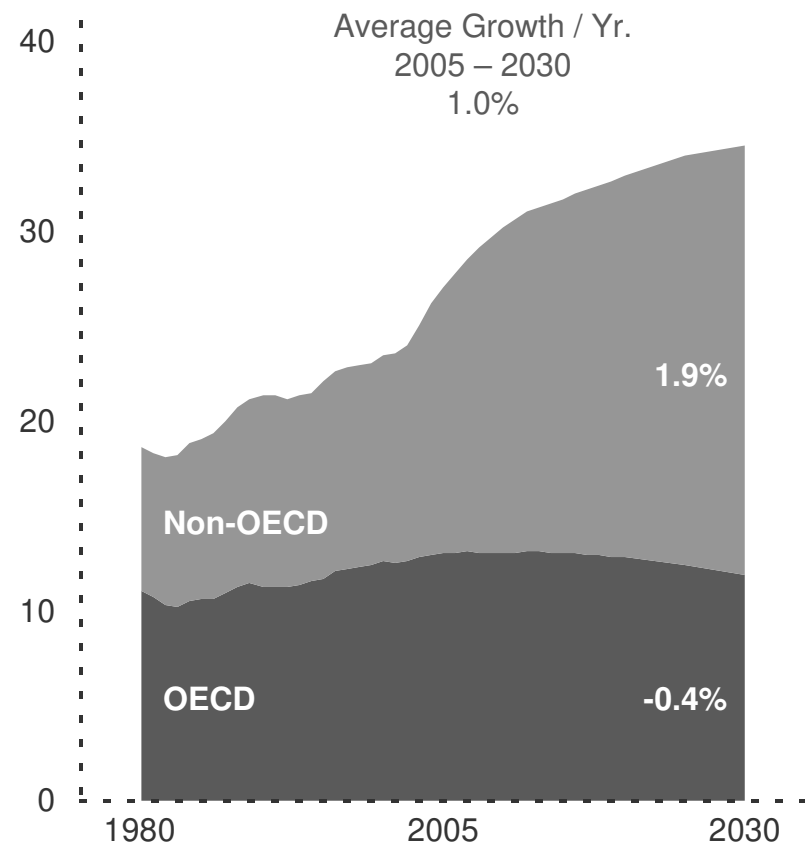
energy demand

MBDOE



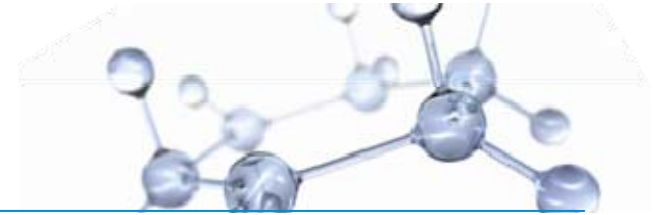
CO₂ emissions

billion tonnes



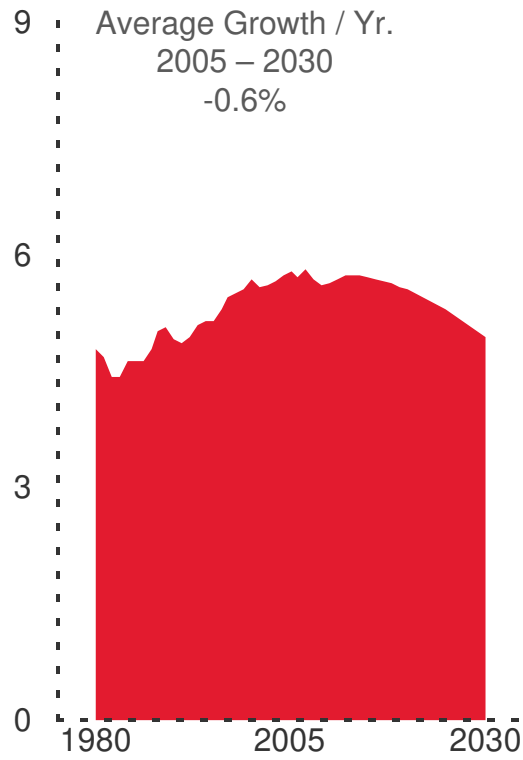
*OECD: Organization for Economic Co-operation and Development 20

CO₂ outlook by region



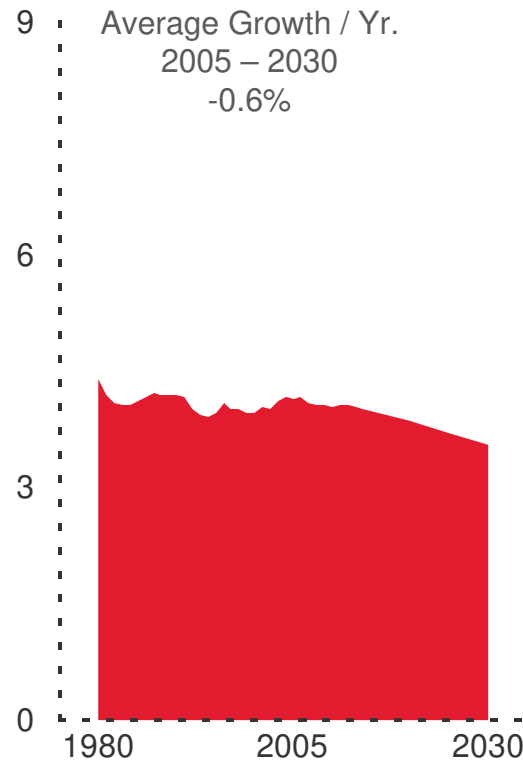
United States

billion tonnes



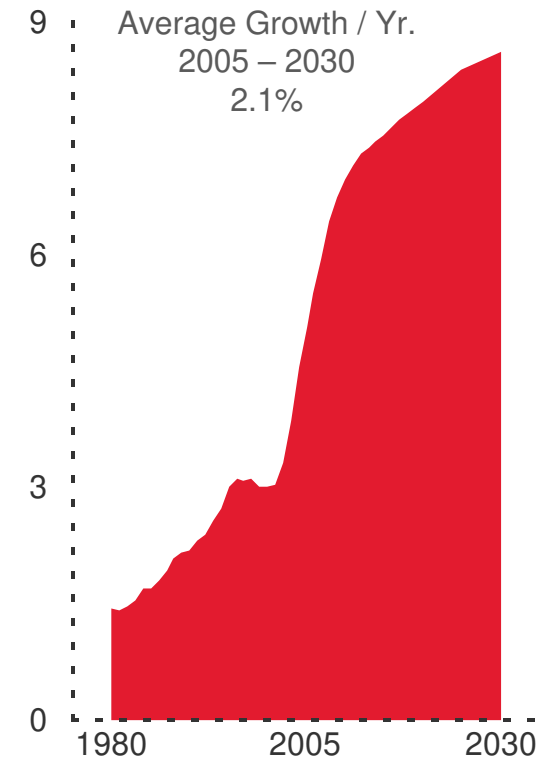
European Union

billion tonnes



China

billion tonnes





the energy imperative

2

ExxonMobil
Taking on the world's toughest energy challenges.™

integrated set of solutions

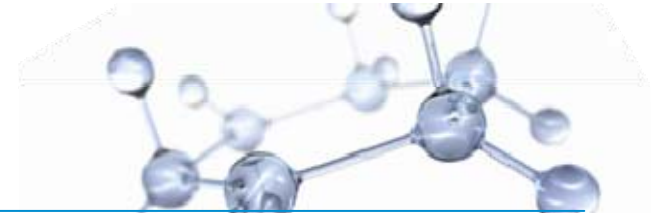


increase efficiency

mitigate emissions

expand supply

conclusion



- population and economies will expand; energy demand and CO₂ emissions will rise
- integrated set of solutions required
 - increase efficiency
 - expand supply
 - mitigate emissions
- technology breakthroughs are critical
- meeting this demand will require a global effort