

The Outlook for Energy: A View to 2040

Todd Onderdonk
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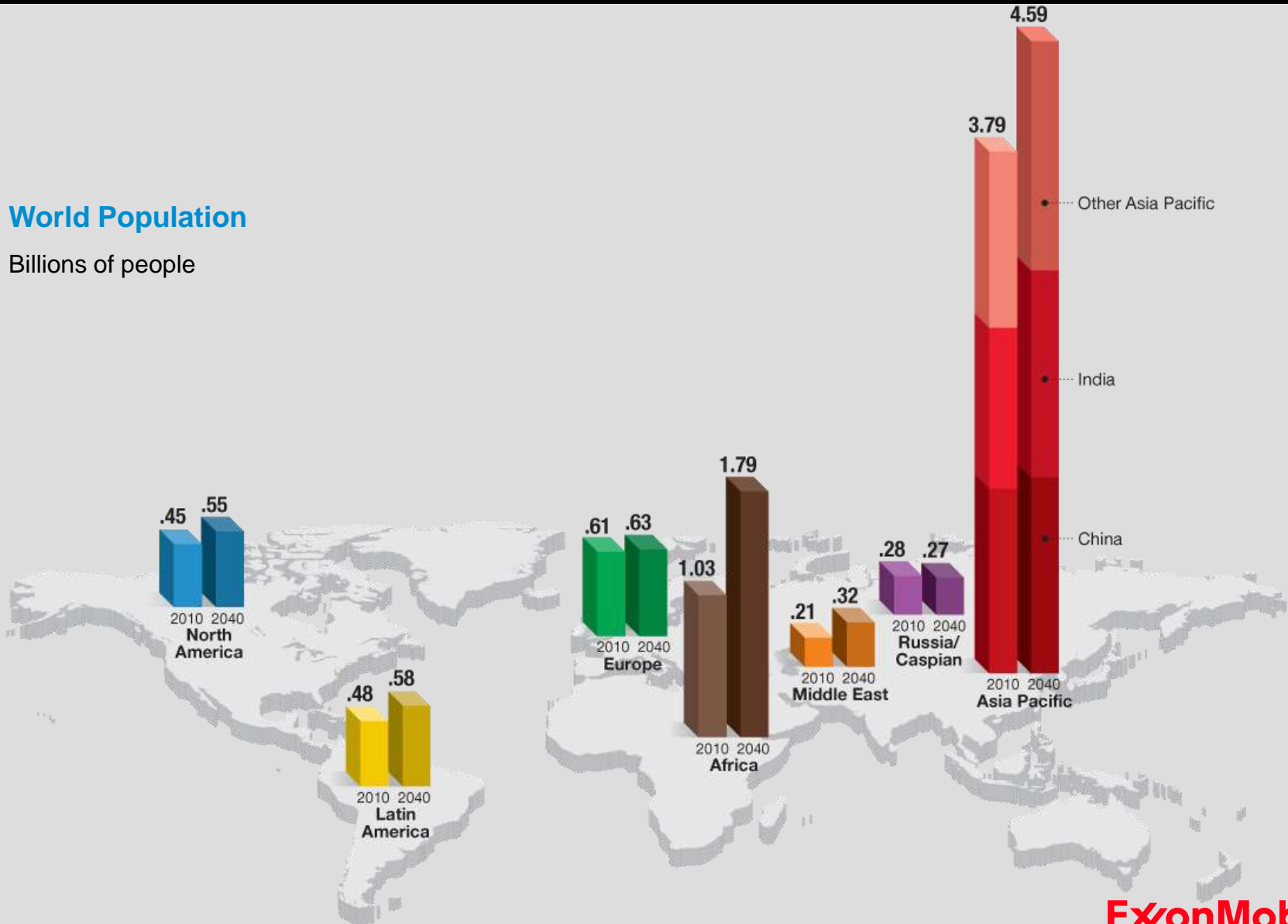
This presentation includes forward-looking statements. Actual future conditions (including economic conditions, energy demand, and energy supply) could differ materially due to changes in technology, the development of new supply sources, political events, demographic changes, and other factors discussed herein and under the heading "Factors Affecting Future Results" in the Investors section of our website at: www.exxonmobil.com. The information provided includes ExxonMobil's internal estimates and forecasts based upon internal data and analyses as well as publically-available information from external sources including the International Energy Agency. This material is not to be used or reproduced without the permission of Exxon Mobil Corporation. All rights reserved.

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Population Trends Impact Energy Use

World Population

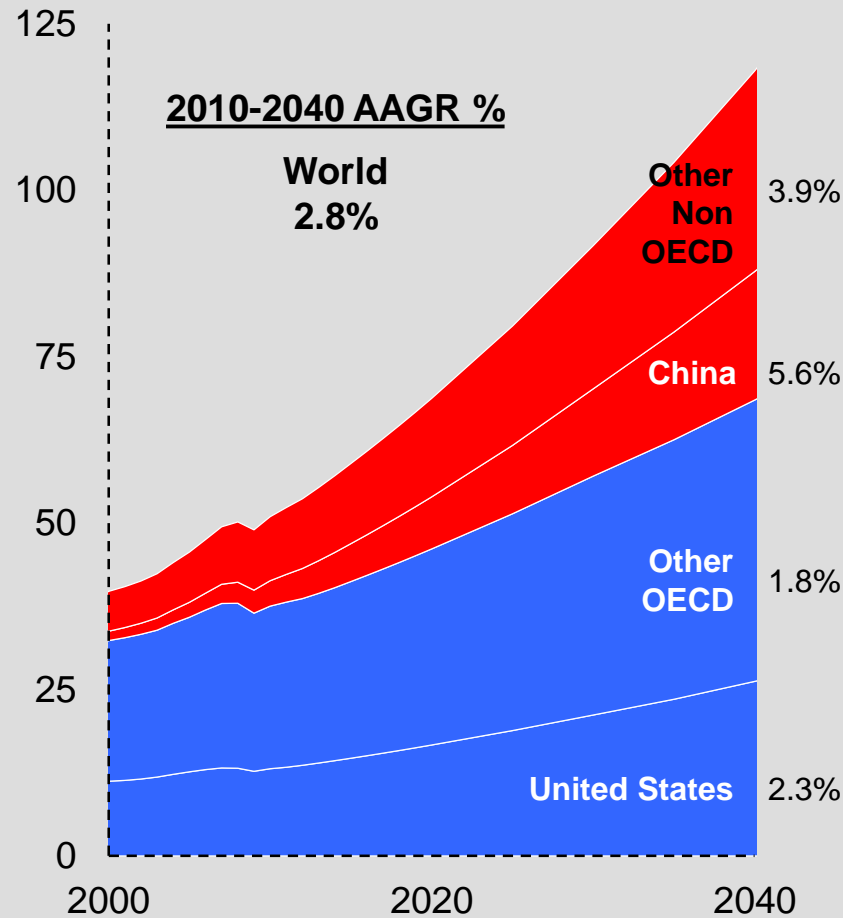
Billions of people



Economic Growth Drives Energy Demand

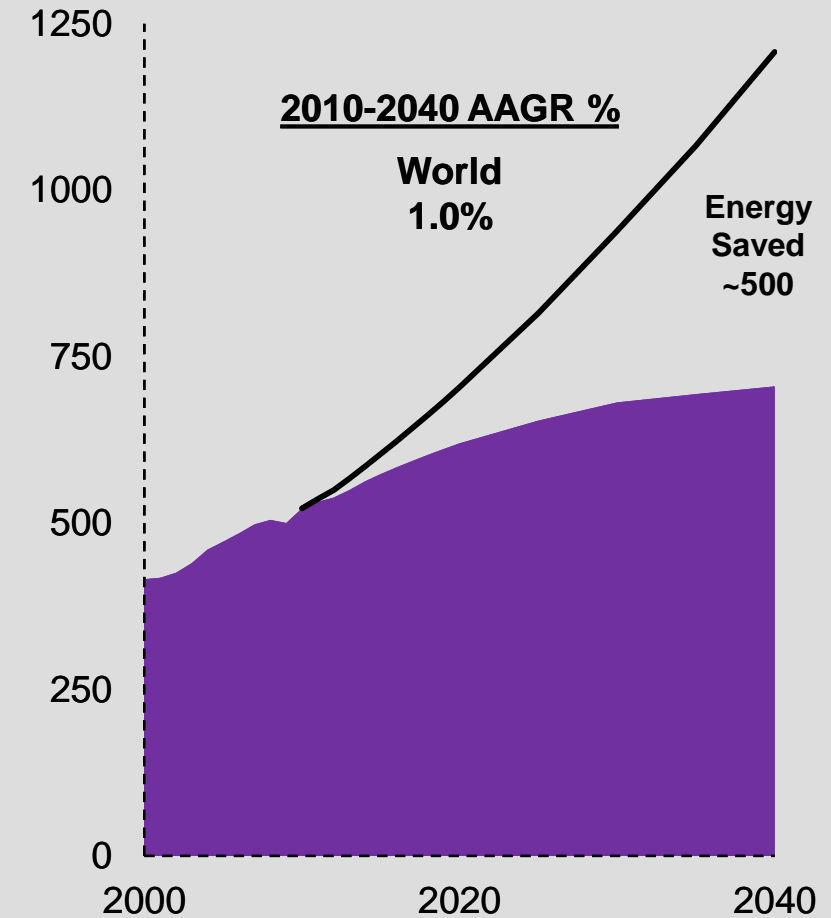
GDP

Trillion 2005\$



Energy Demand

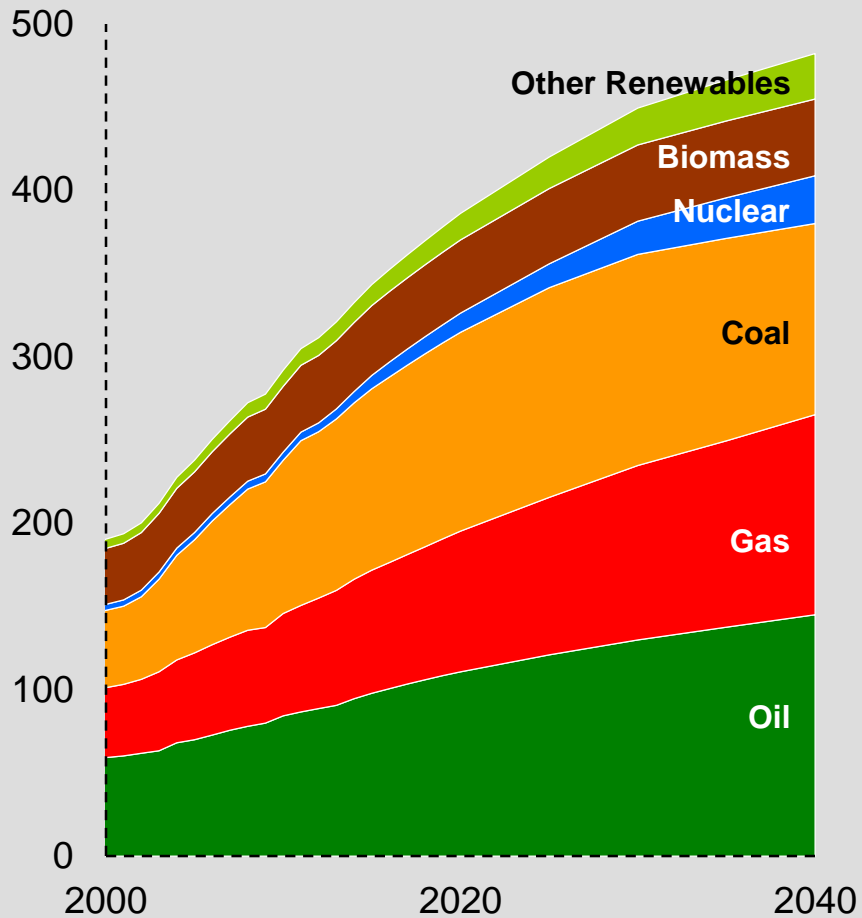
Quadrillion BTUs



Tale of Two Worlds

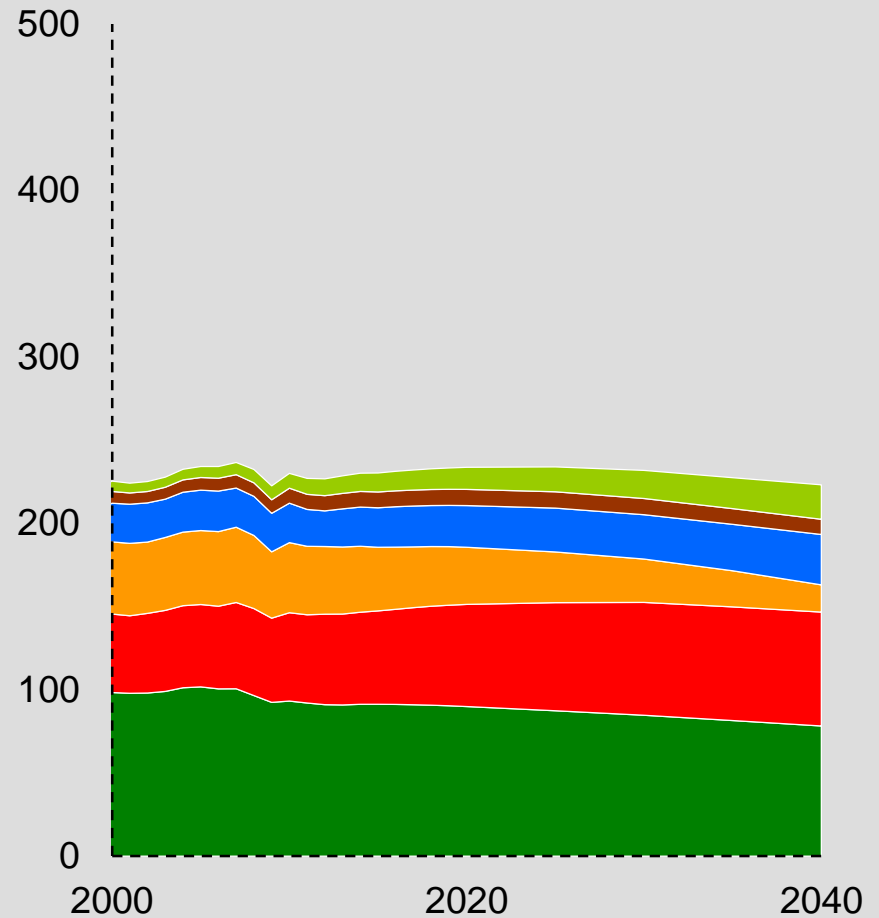
Non OECD

Quadrillion BTUs



OECD

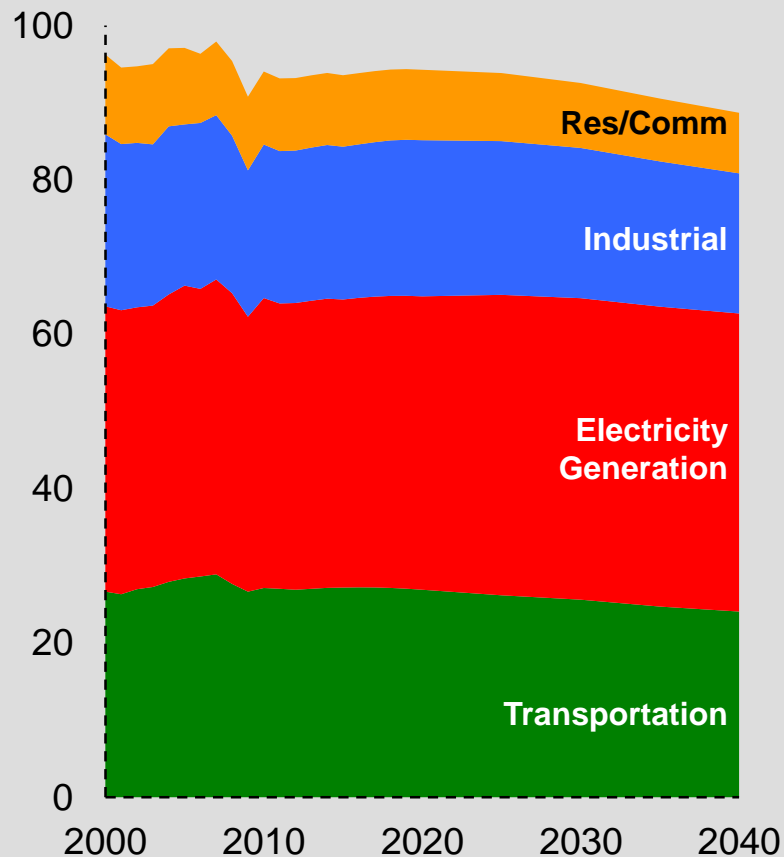
Quadrillion BTUs



United States Energy Demand and Supply

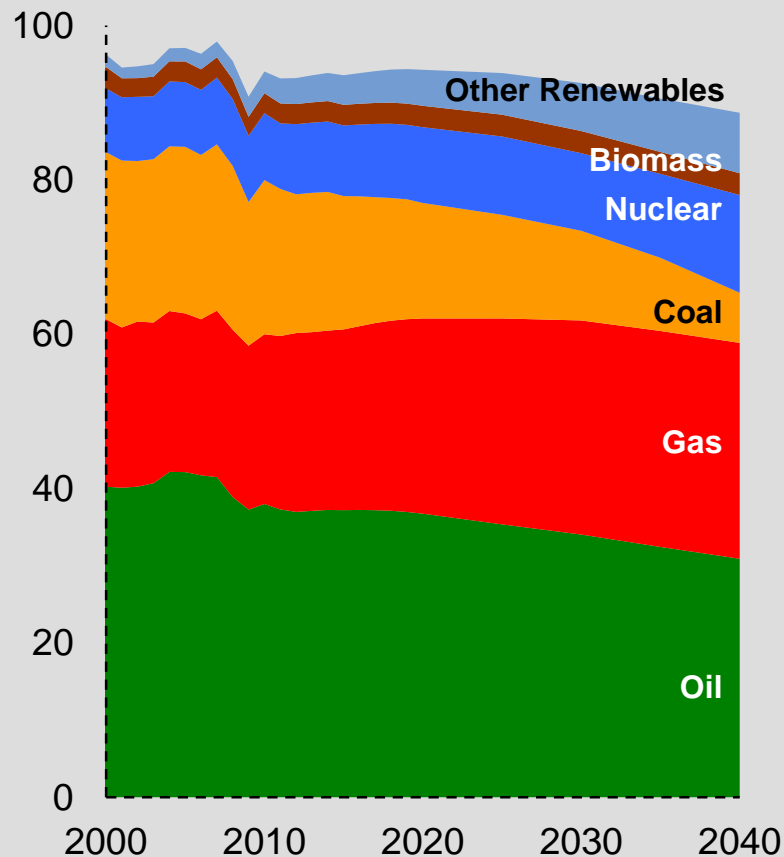
By Sector

Quadrillion BTUs



By Fuel

Quadrillion BTUs



Supply



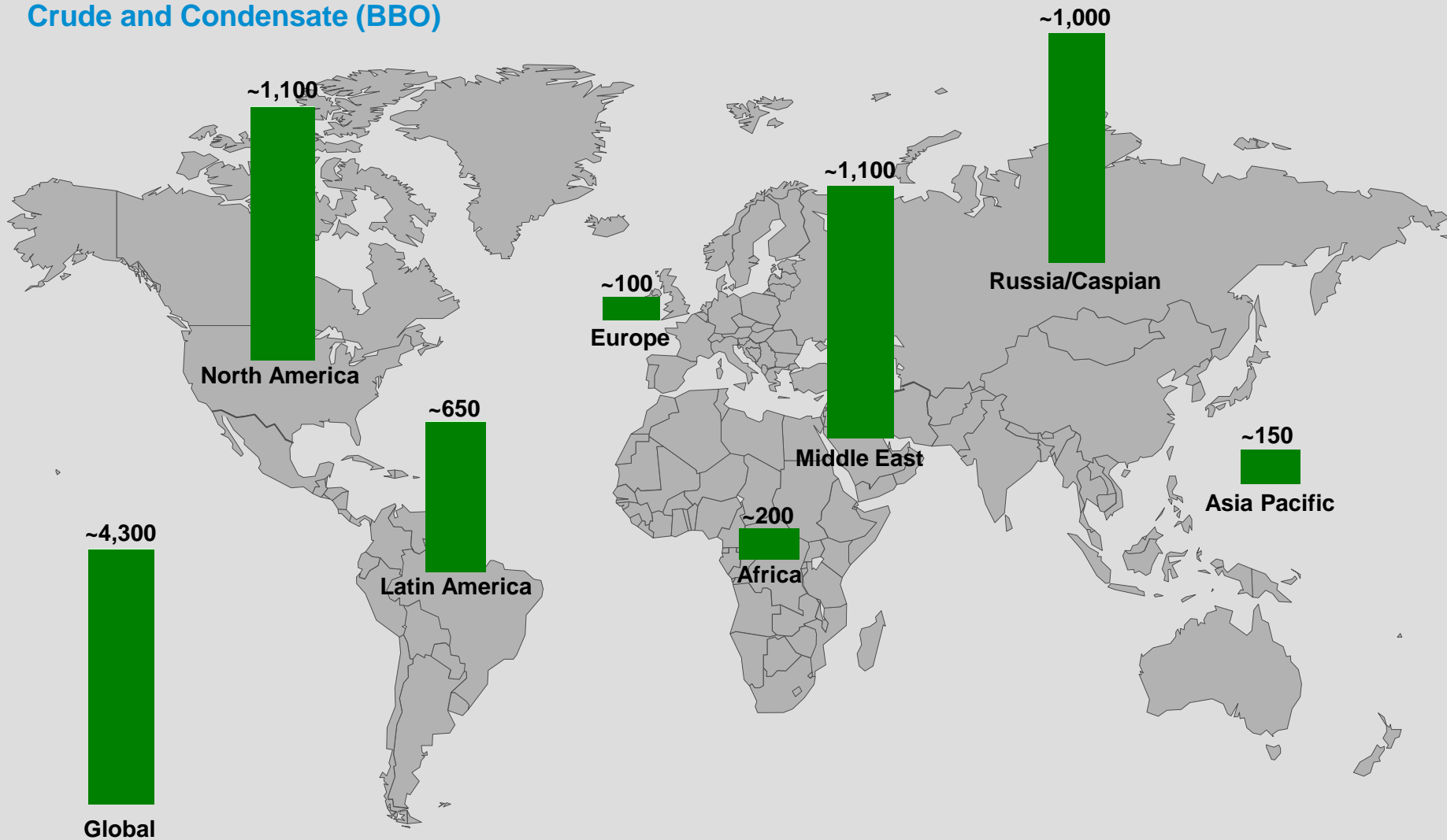
60%

Oil and gas will supply about 60 percent of global energy demand in 2040, up from 55 percent in 2010.



Remaining Oil Resource

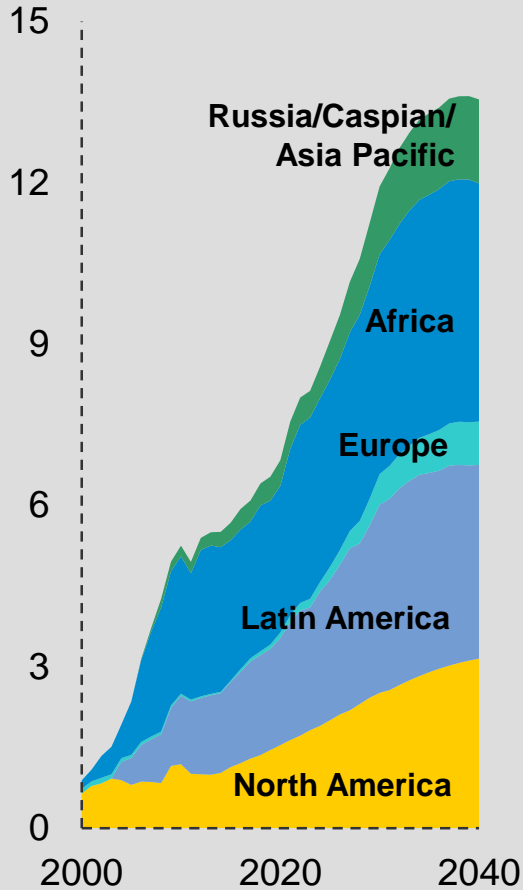
Crude and Condensate (BBO)



Technology Driven Supplies Expand Globally

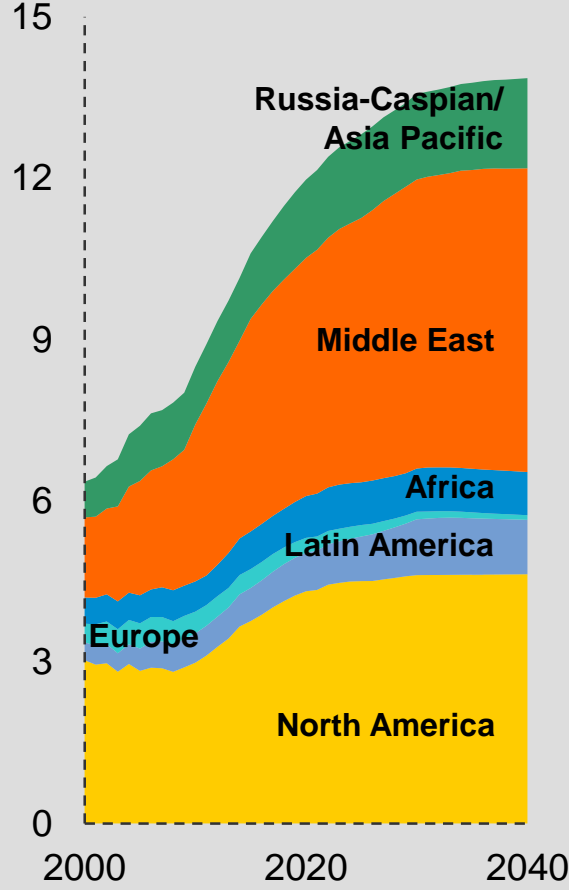
Deepwater by Region

MBDOE



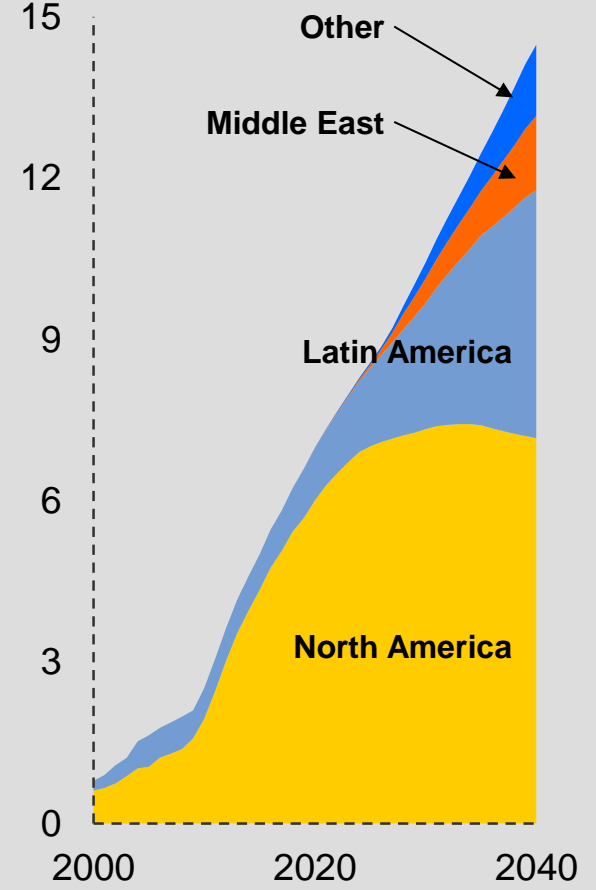
NGL by Region

MBDOE



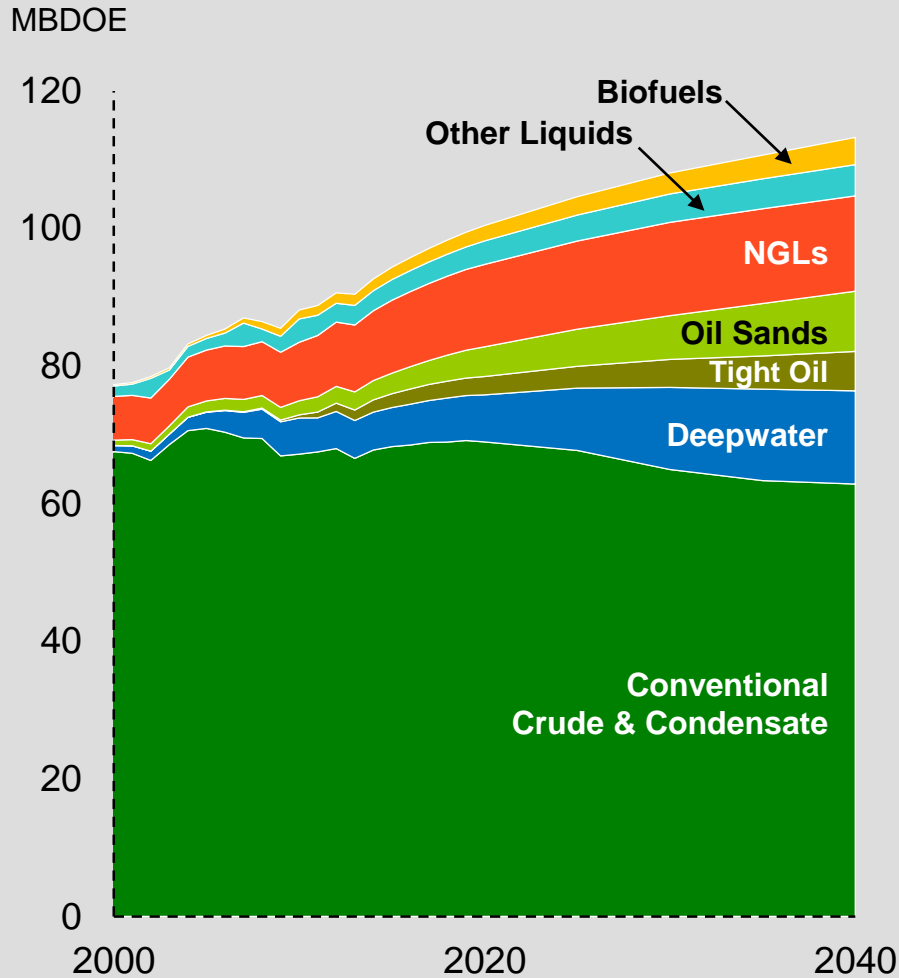
Unconventional Oil by Region

MBDOE

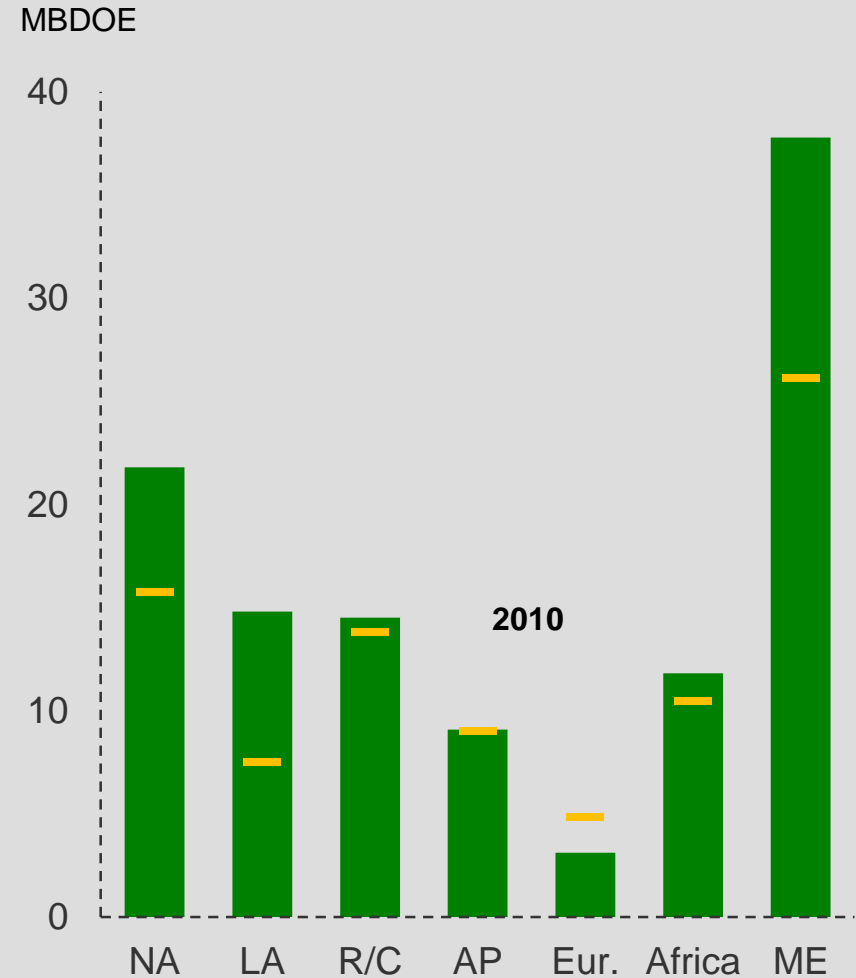


Liquids Supply

Supply by Type

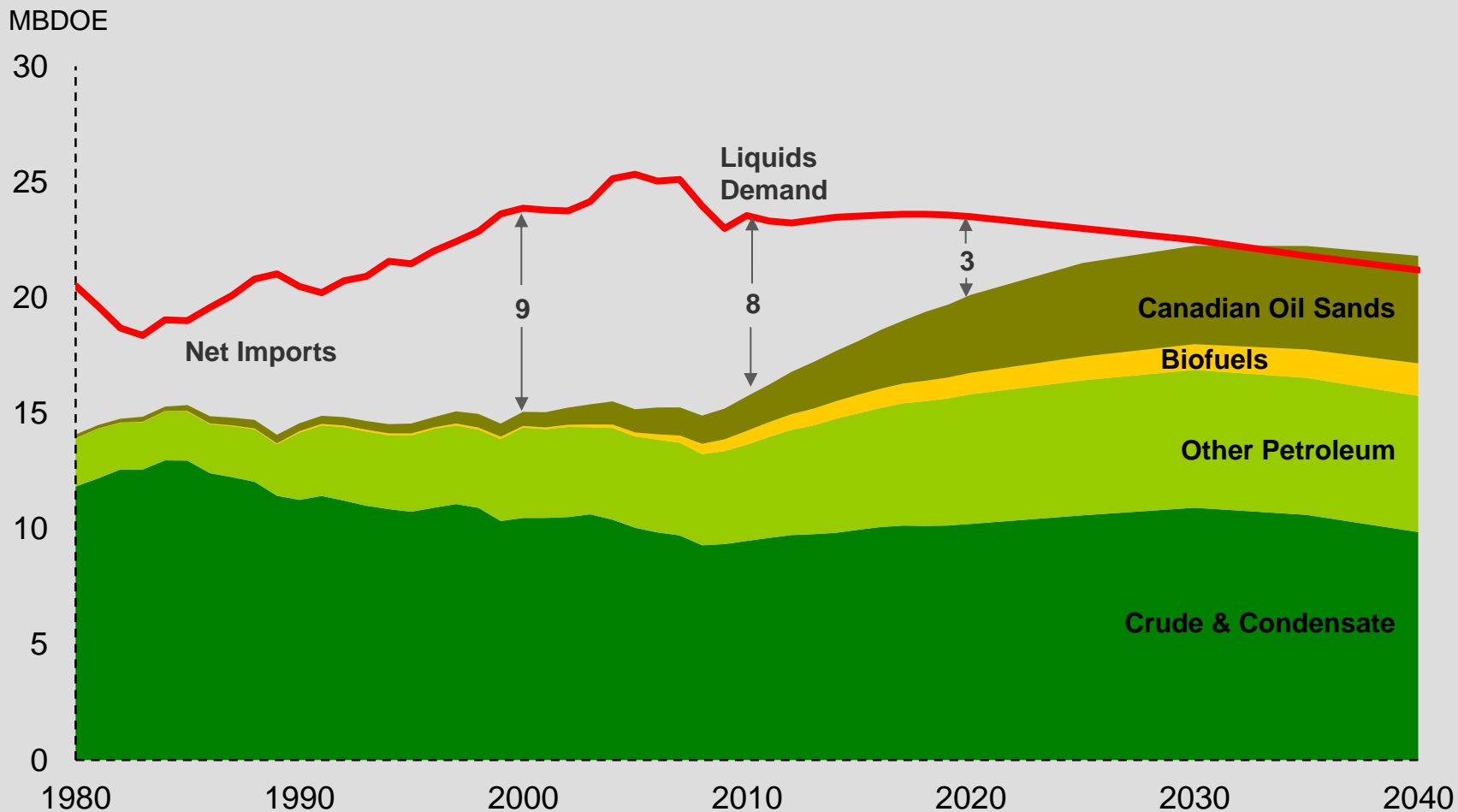


2040 Liquids Supply by Region



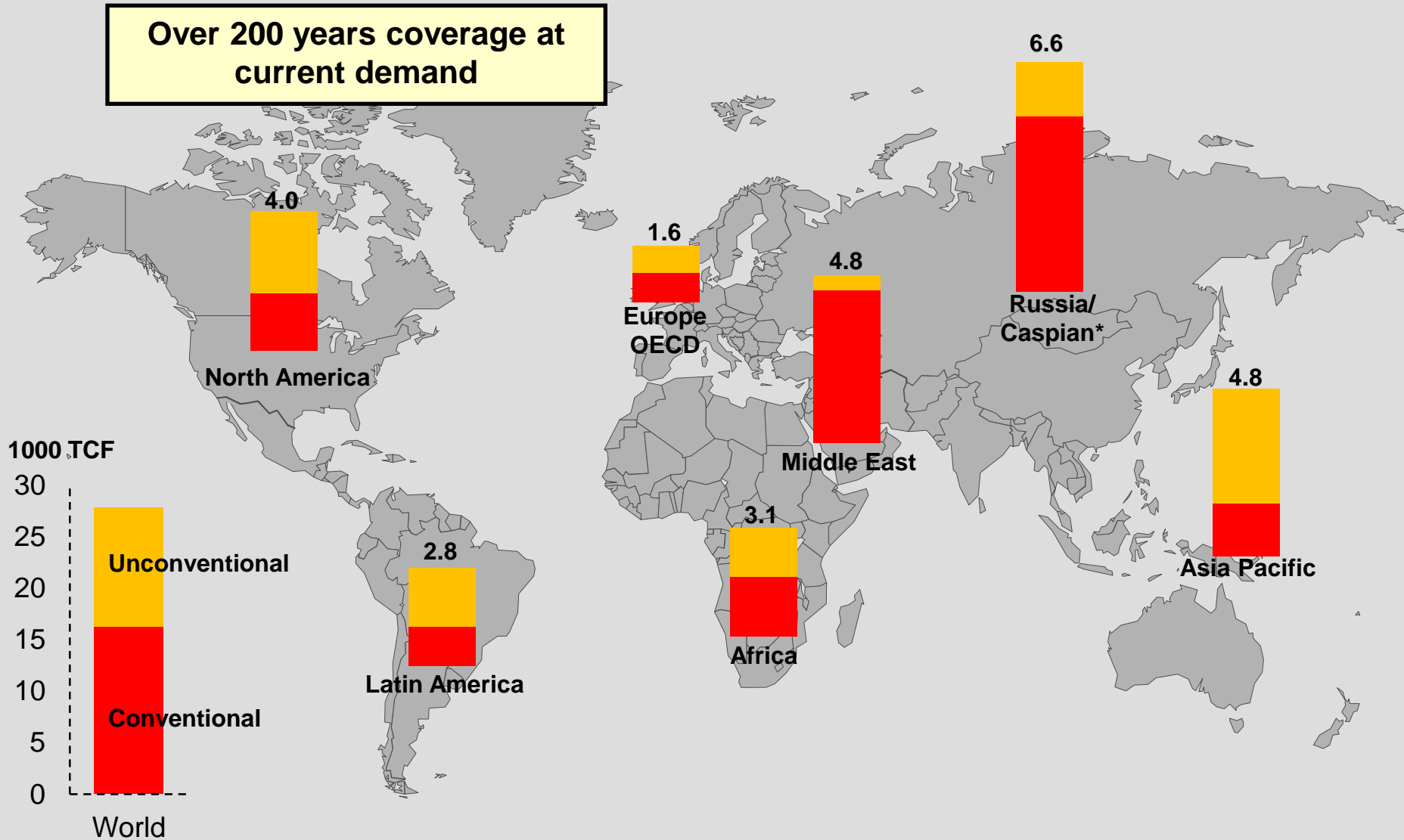
North America Liquids Supply Grows

North America Liquids Supply and Demand



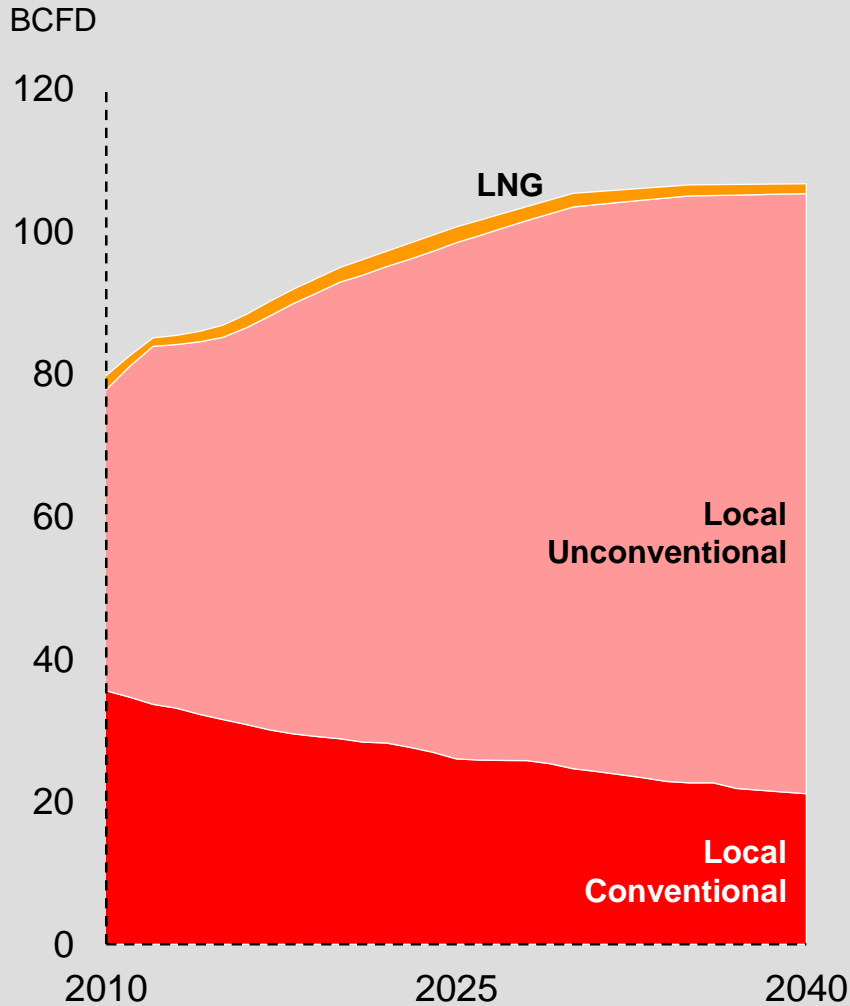
Remaining Global Gas Resource

Over 200 years coverage at current demand

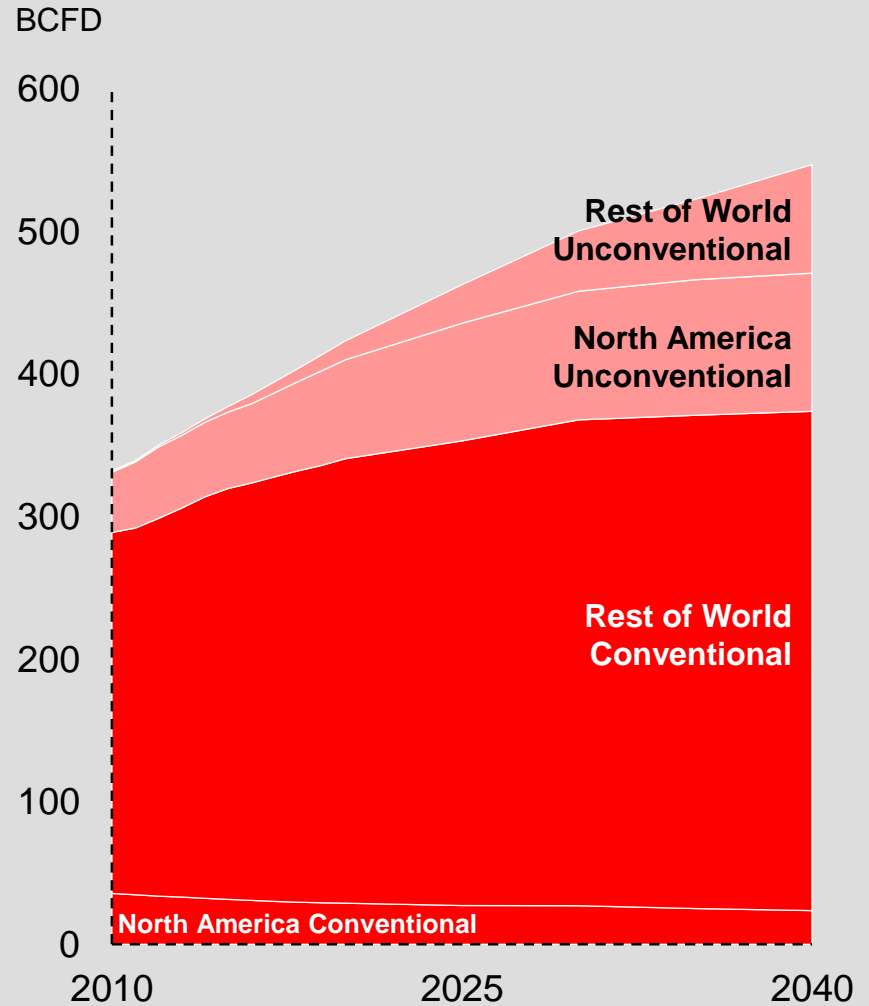


Natural Gas Supply and Demand Shifts

North America Gas Supply



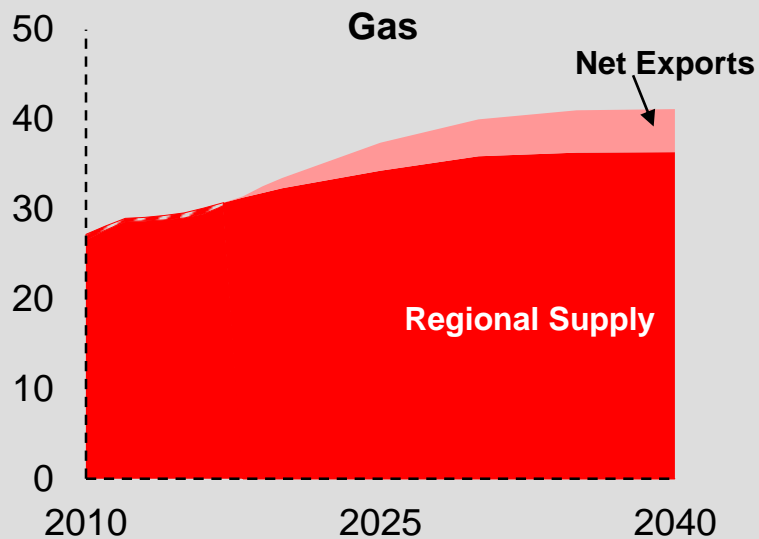
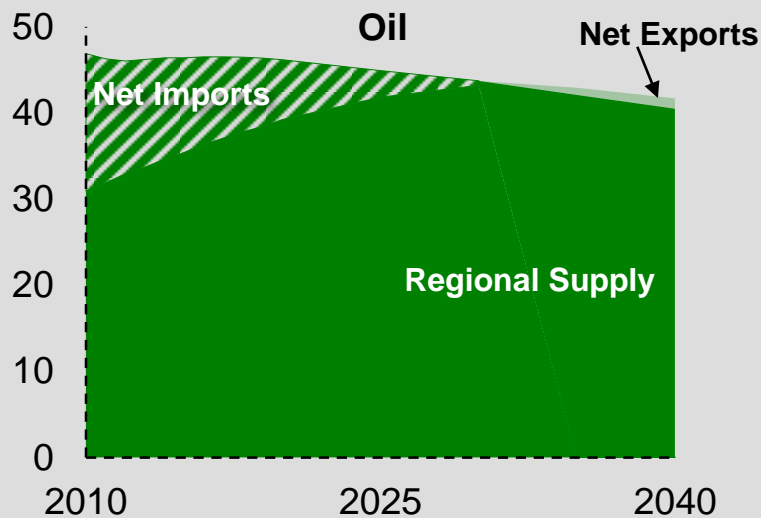
Global Gas Supply



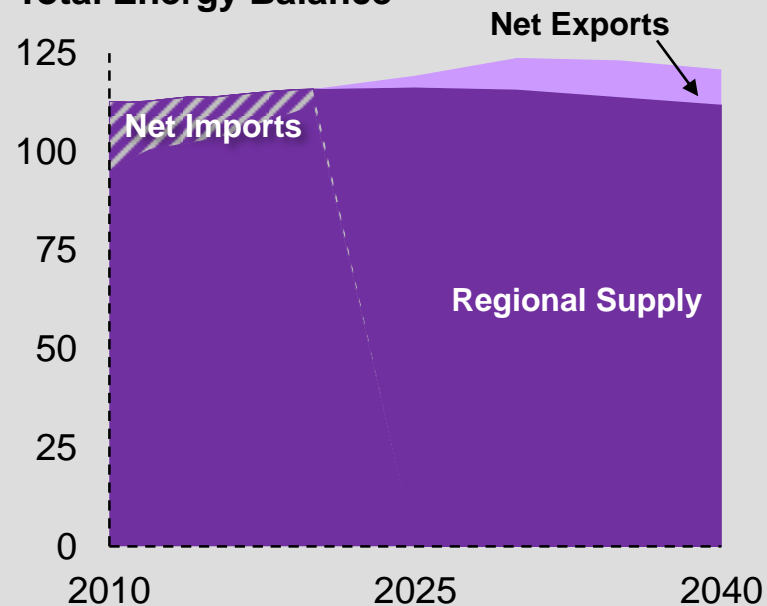
North America Energy Balance



Quadrillion BTUs



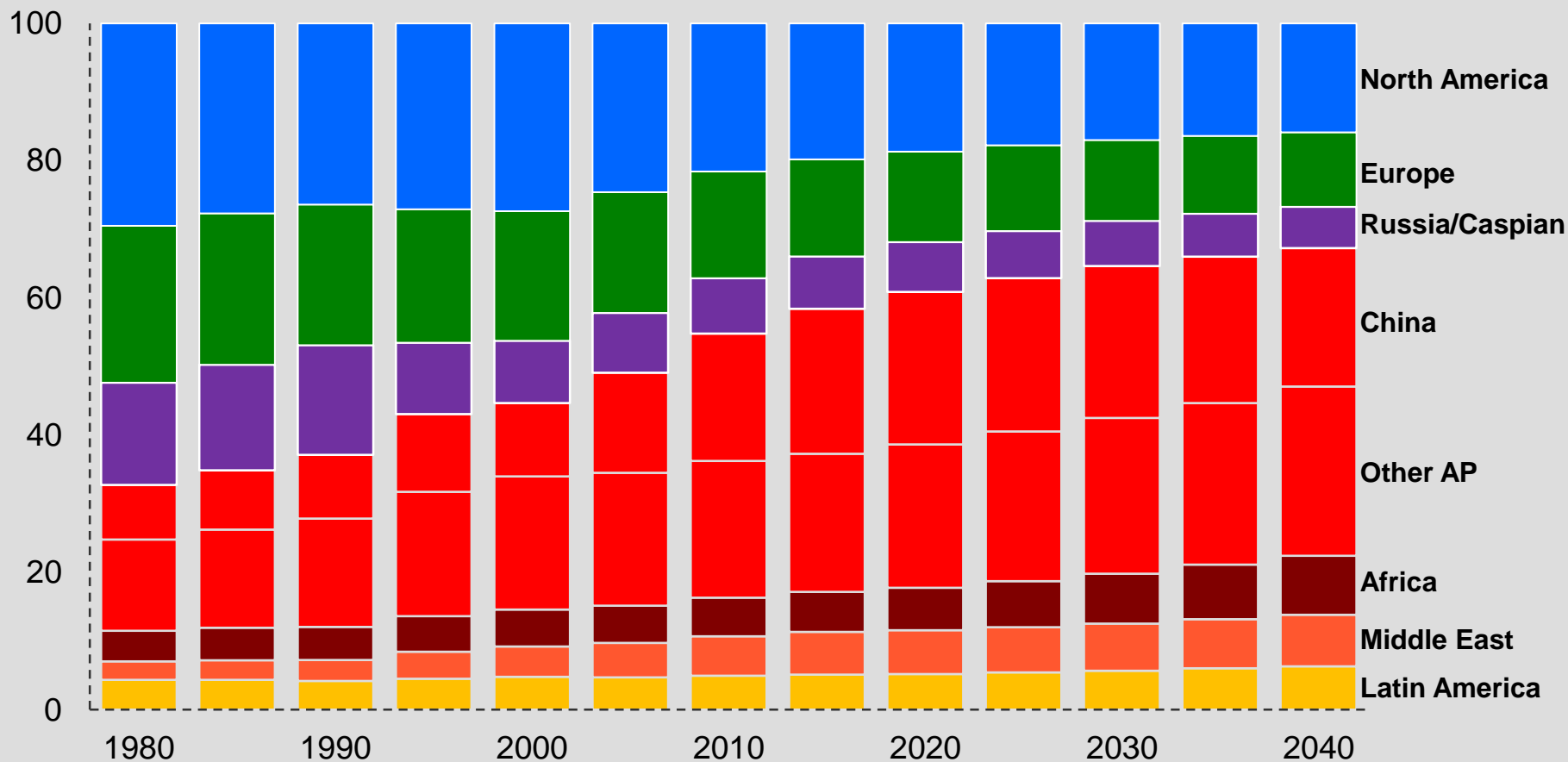
Total Energy Balance



Regional Energy Demand Trends Evolve

By Region

Percent of World Total



Conclusions



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