

ExxonMobil

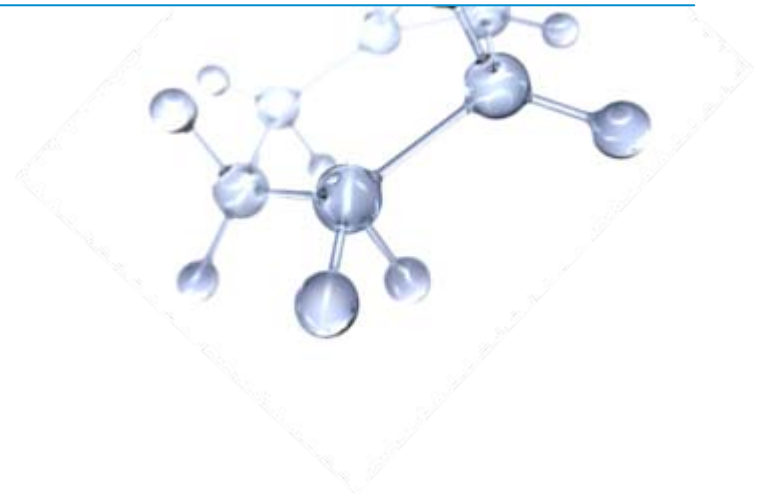
Taking on the world's toughest energy challenges.™

The Outlook for Energy a view to 2030

Todd Onderdonk

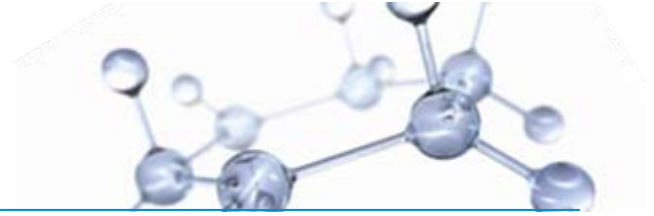
USAEE -- Houston

January 13, 2011

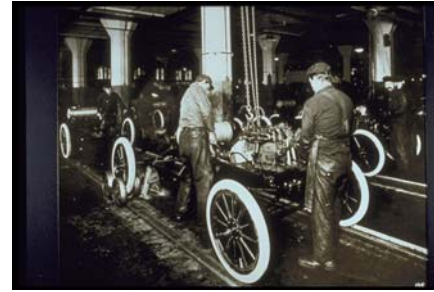


This presentation includes forward-looking statements. Actual future conditions (including economic conditions, energy demand, and energy supply) could differ materially due to changes in technology, the development of new supply sources, political events, demographic changes, and other factors discussed herein and 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 reproduced without the permission of Exxon Mobil Corporation.

Economic and Energy Evolution

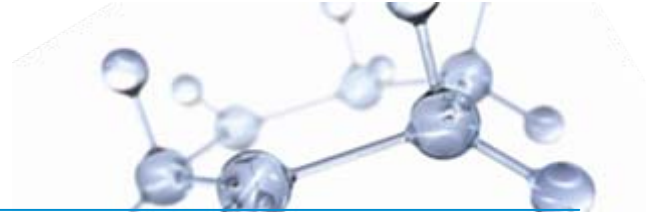


As societies and technologies develop over time...



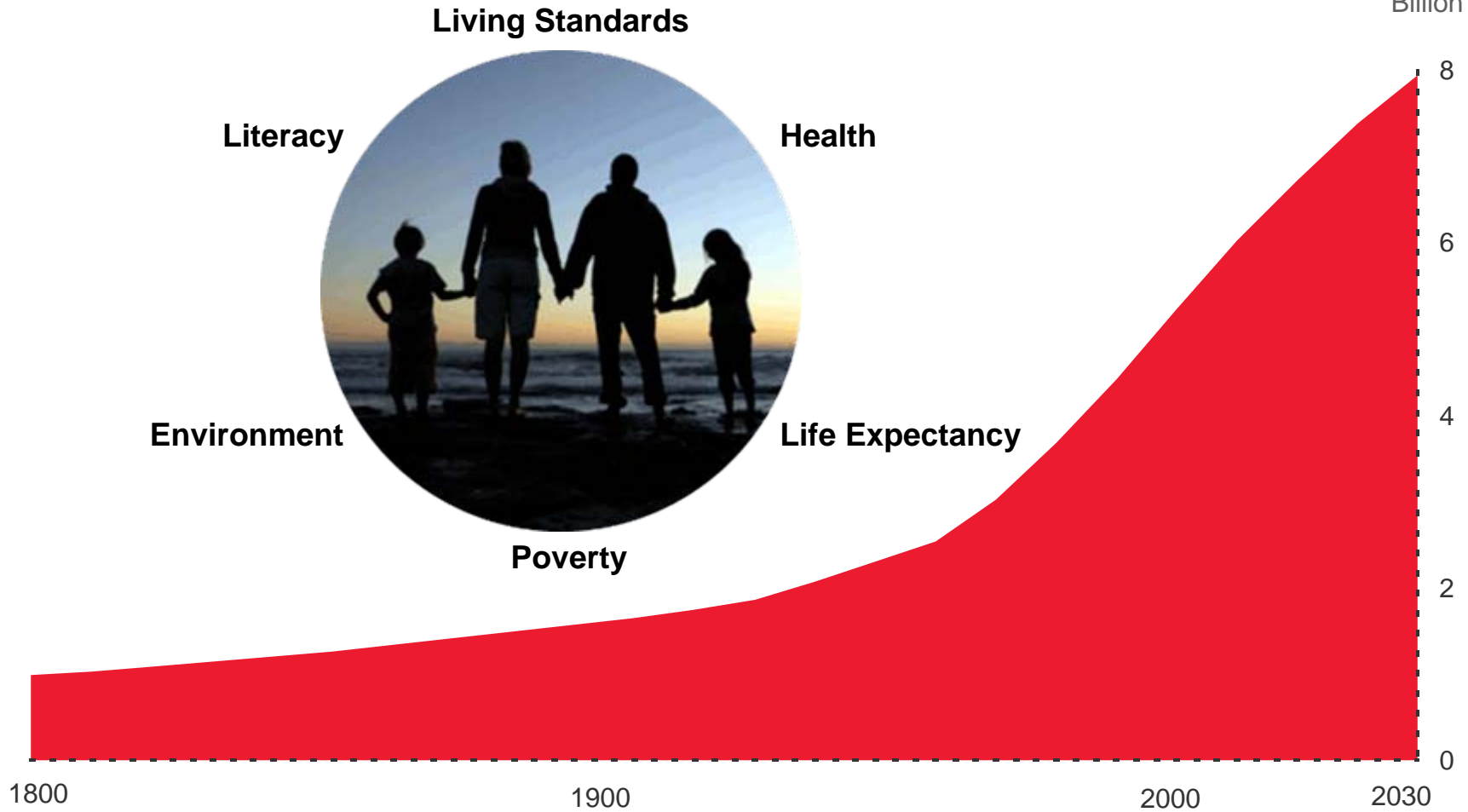
... energy needs evolve as well

Ongoing Development Challenges



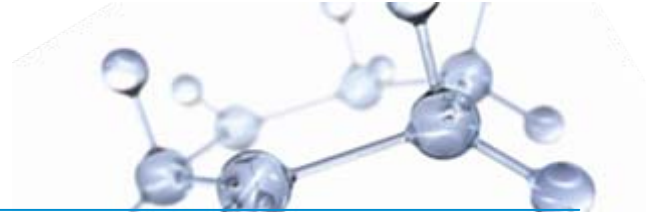
World Population

Billion



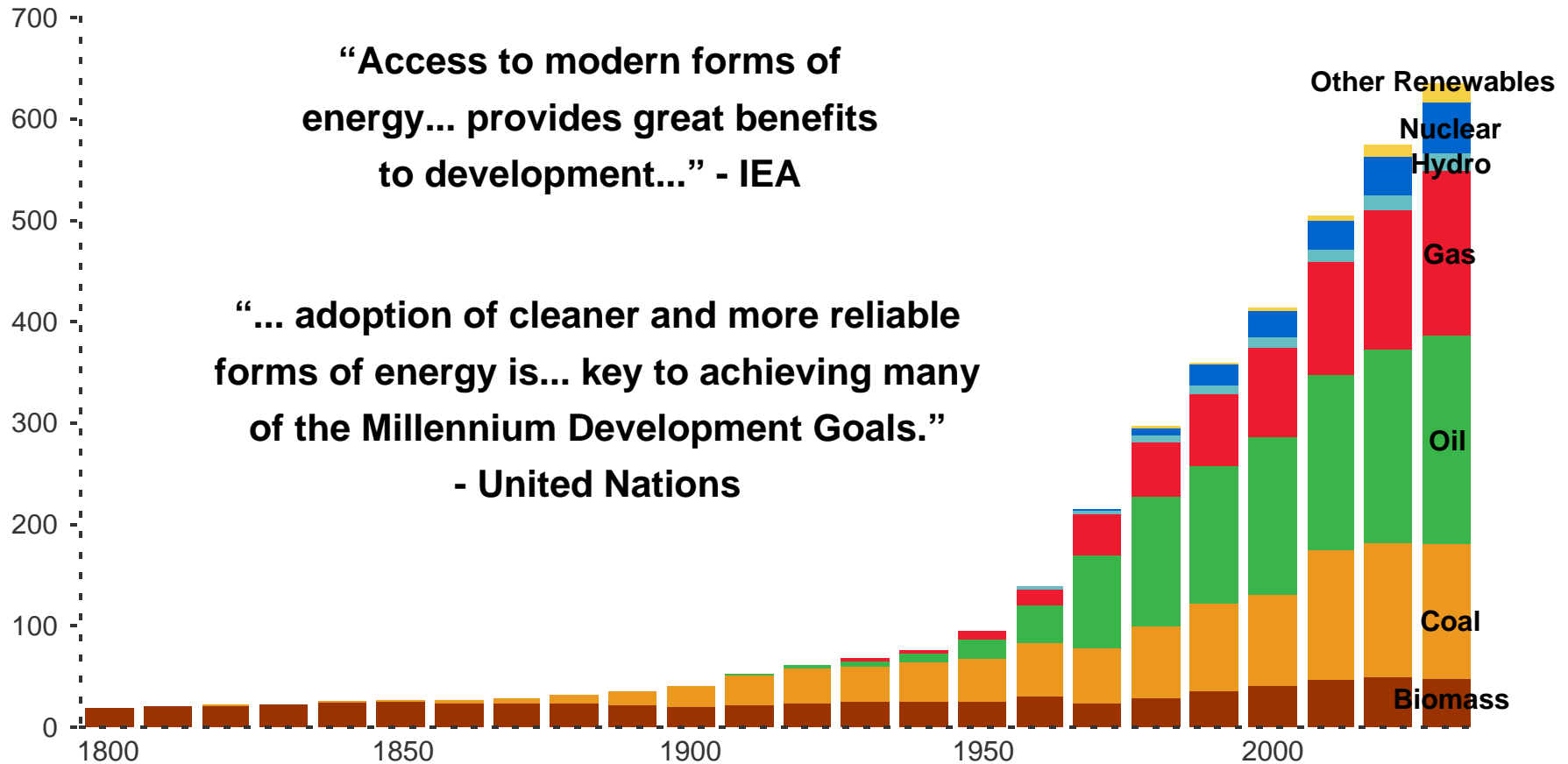
ExxonMobil 2010 Energy Outlook

Economic and Energy Evolution



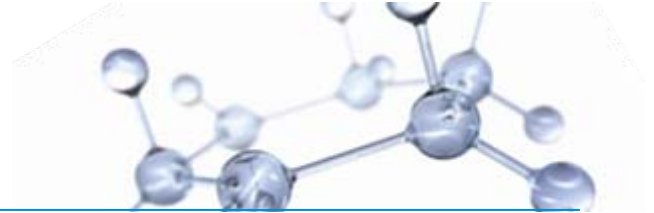
Global Demand By Fuel

Quadrillion BTUs



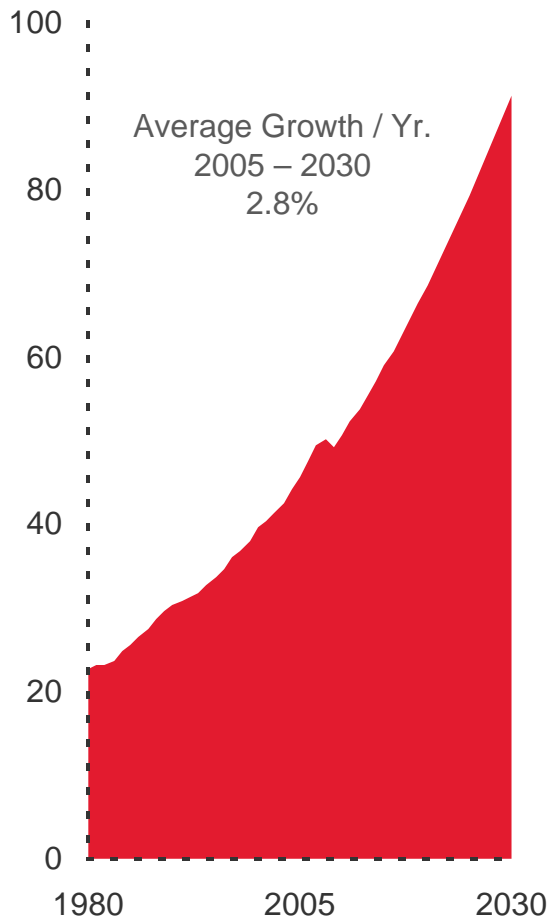
ExxonMobil 2010 Energy Outlook

Economics & Energy Linked



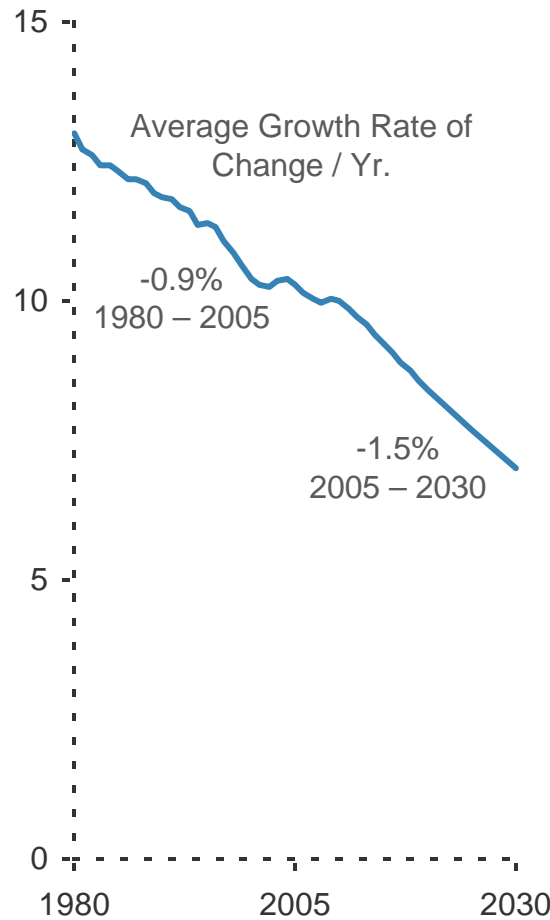
GDP

Trillions in 2005\$



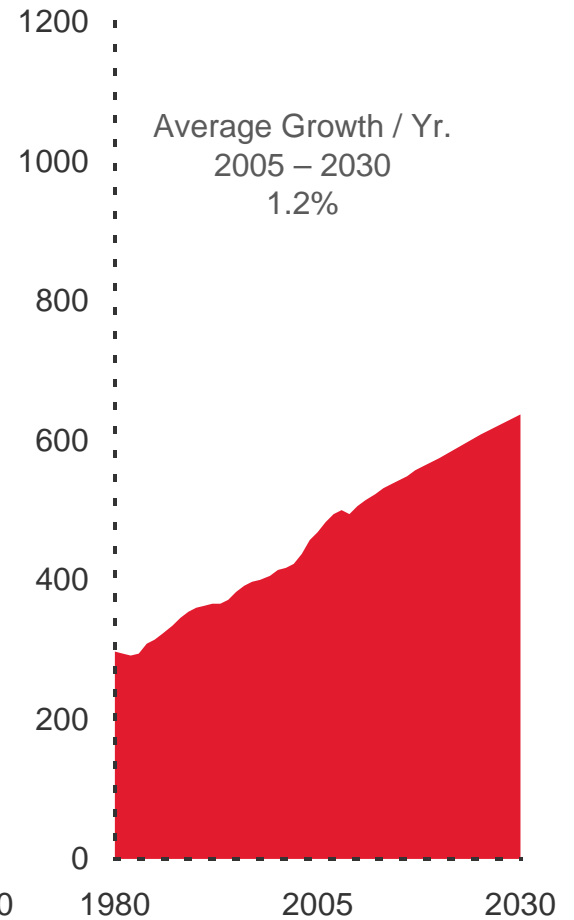
Energy per GDP

MBTU / 2005\$k GDP

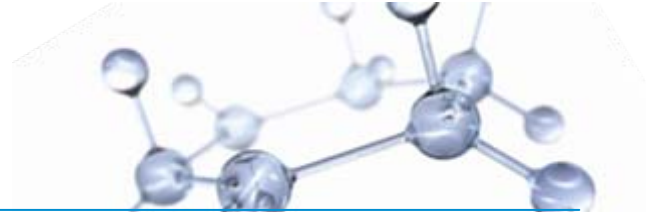


Energy Demand

Quadrillion BTUs

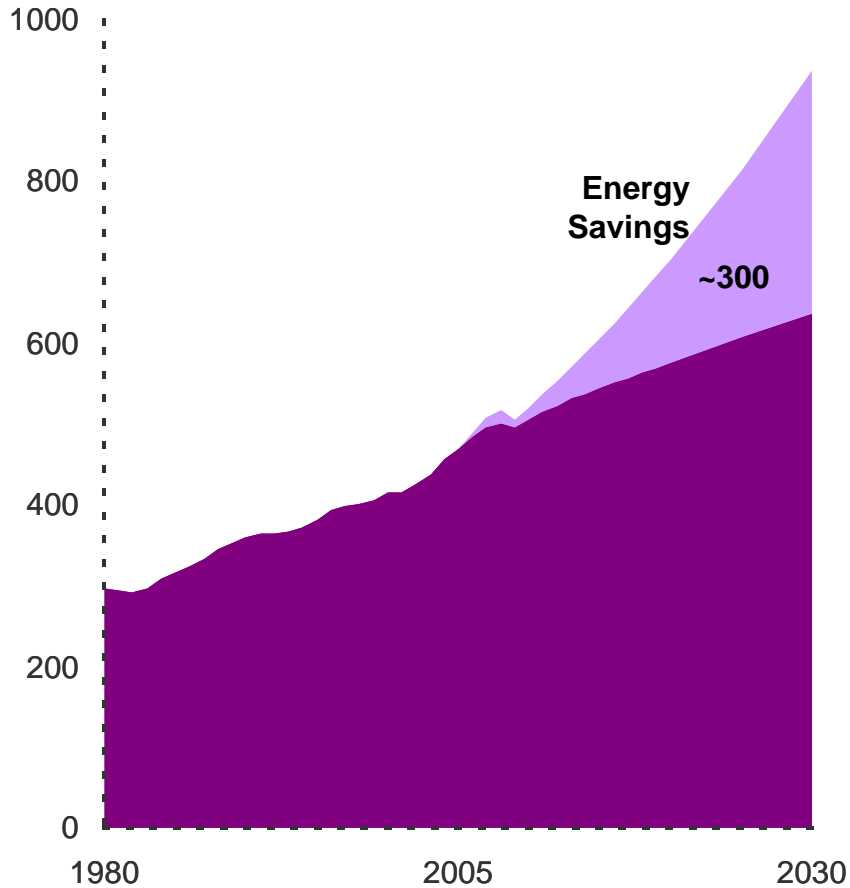


Efficiency Key to Meeting Demand



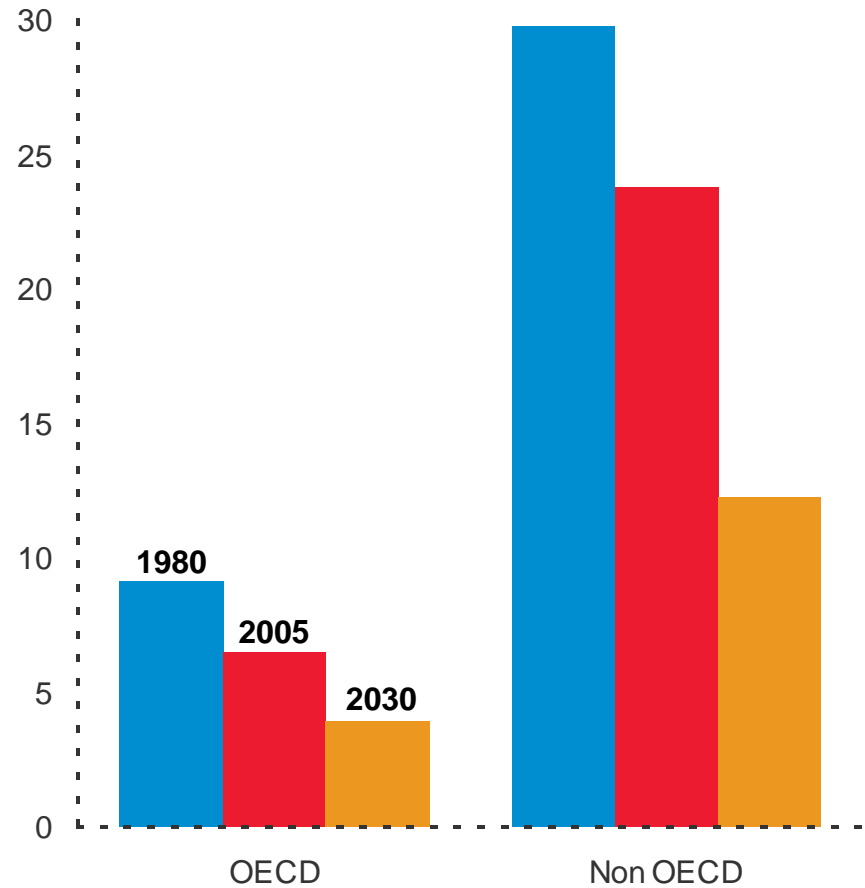
Demand

Quadrillion BTUs



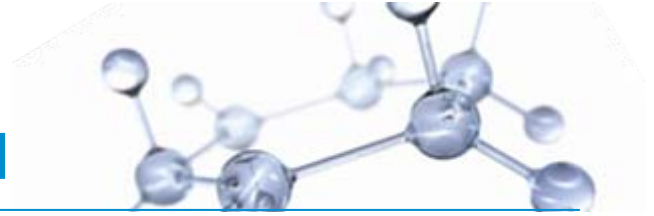
Energy Intensity

MBTU/2005\$k GDP



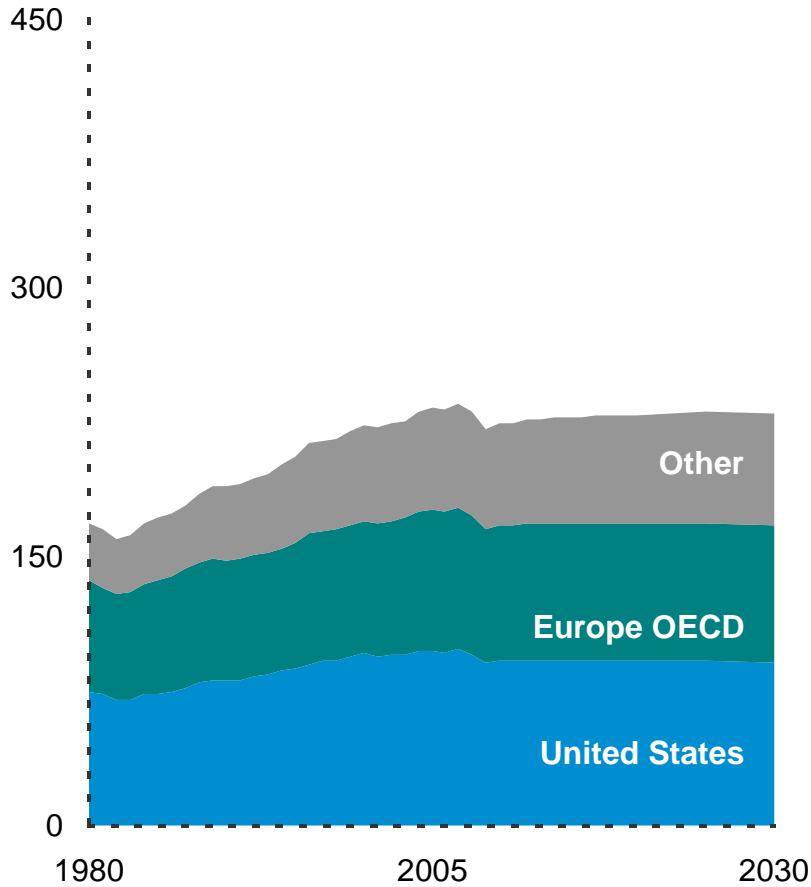
ExxonMobil 2010 Energy Outlook

Expansion Economies Drive Demand



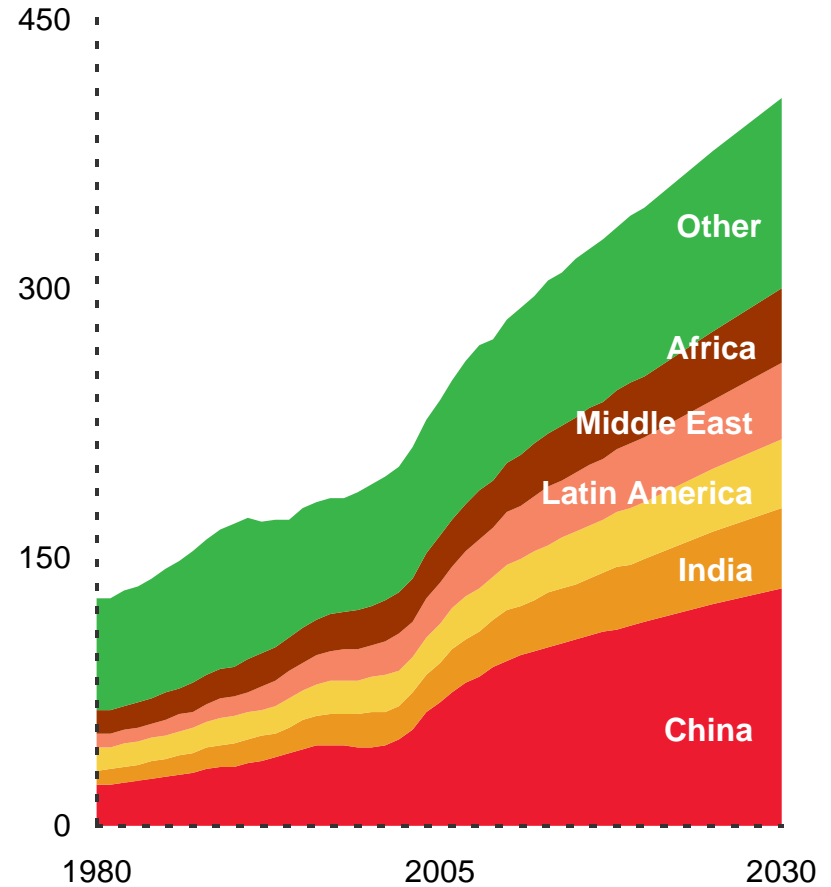
OECD

Quadrillion BTUs



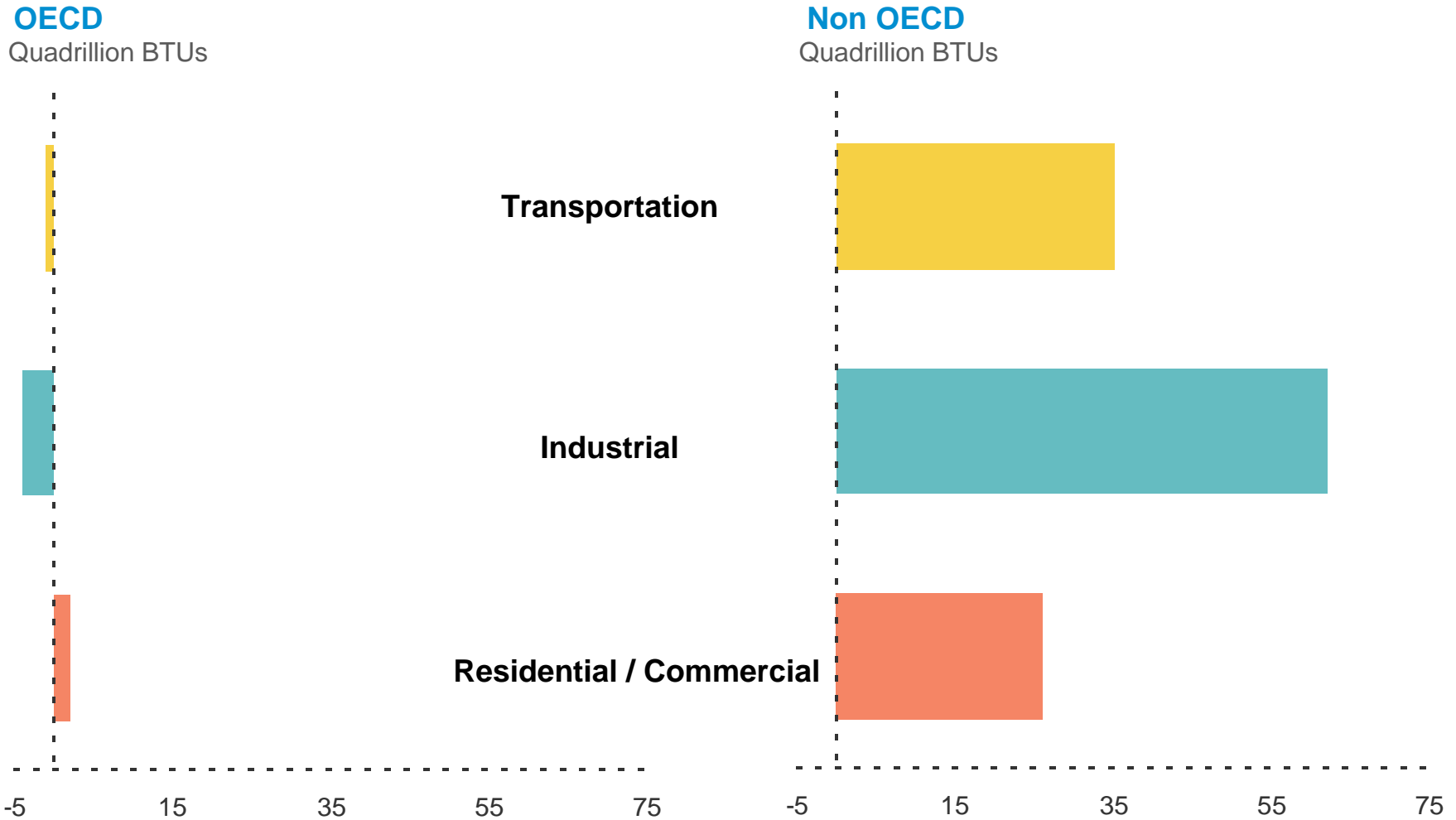
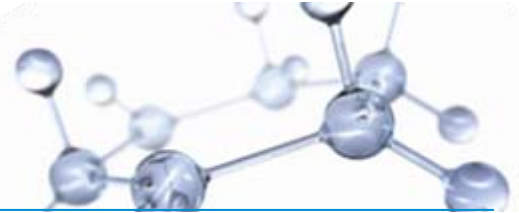
Non OECD

Quadrillion BTUs

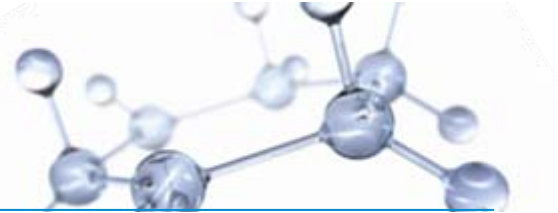


ExxonMobil 2010 Energy Outlook

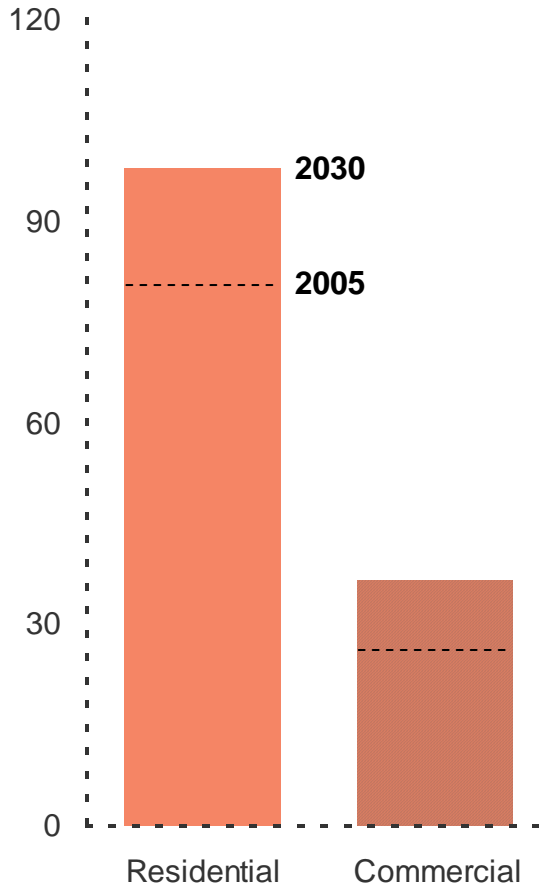
End-Use Growth to 2030 Shifts Globally



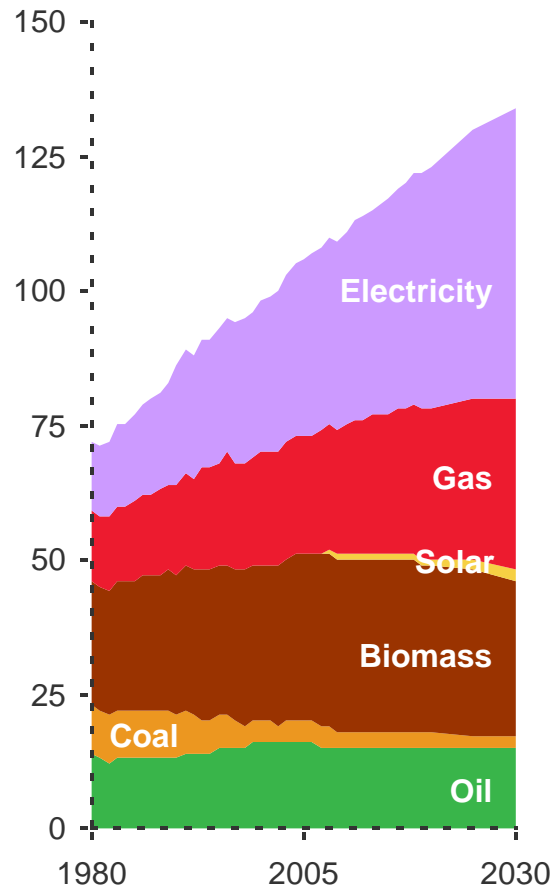
Residential/Commercial Demand Grows



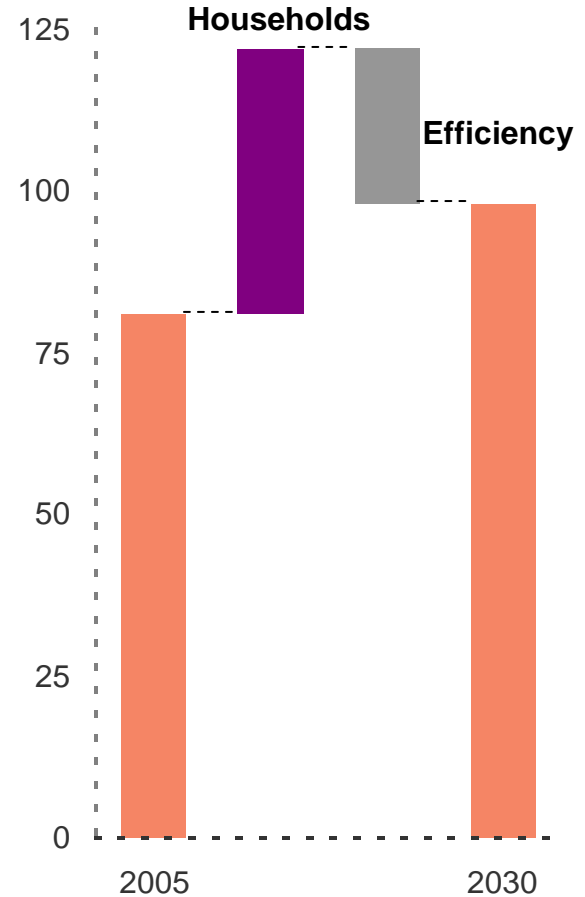
By Sector
Quadrillion BTUs



By Fuel
Quadrillion BTUs



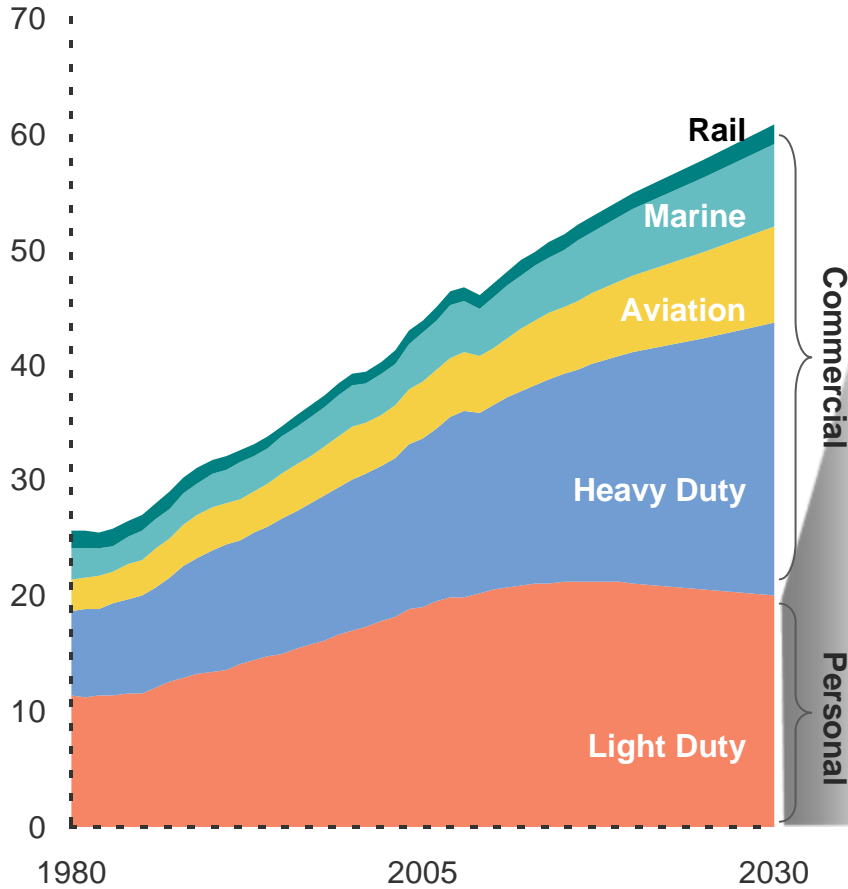
Residential Demand Changes
Quadrillion BTUs



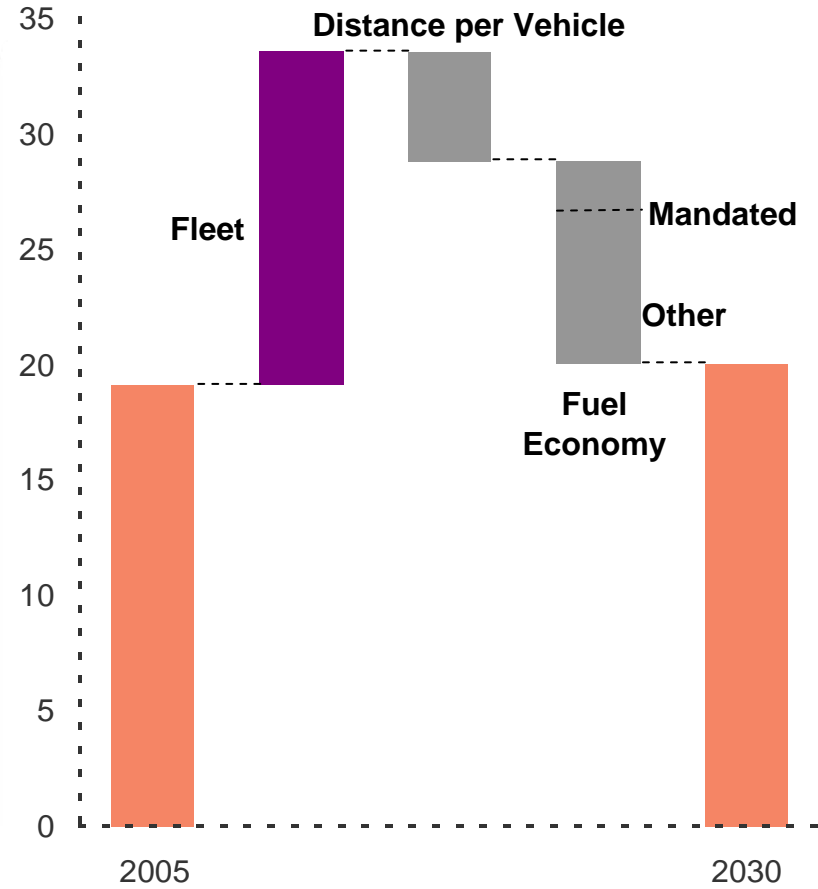
Personal Transportation Demand Flattens



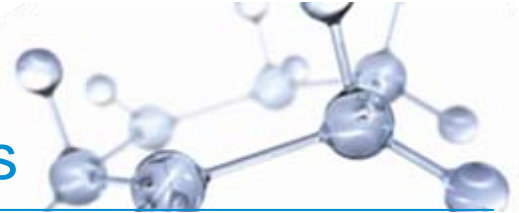
Demand
MBDOE



Personal Vehicle Demand Changes
MBDOE



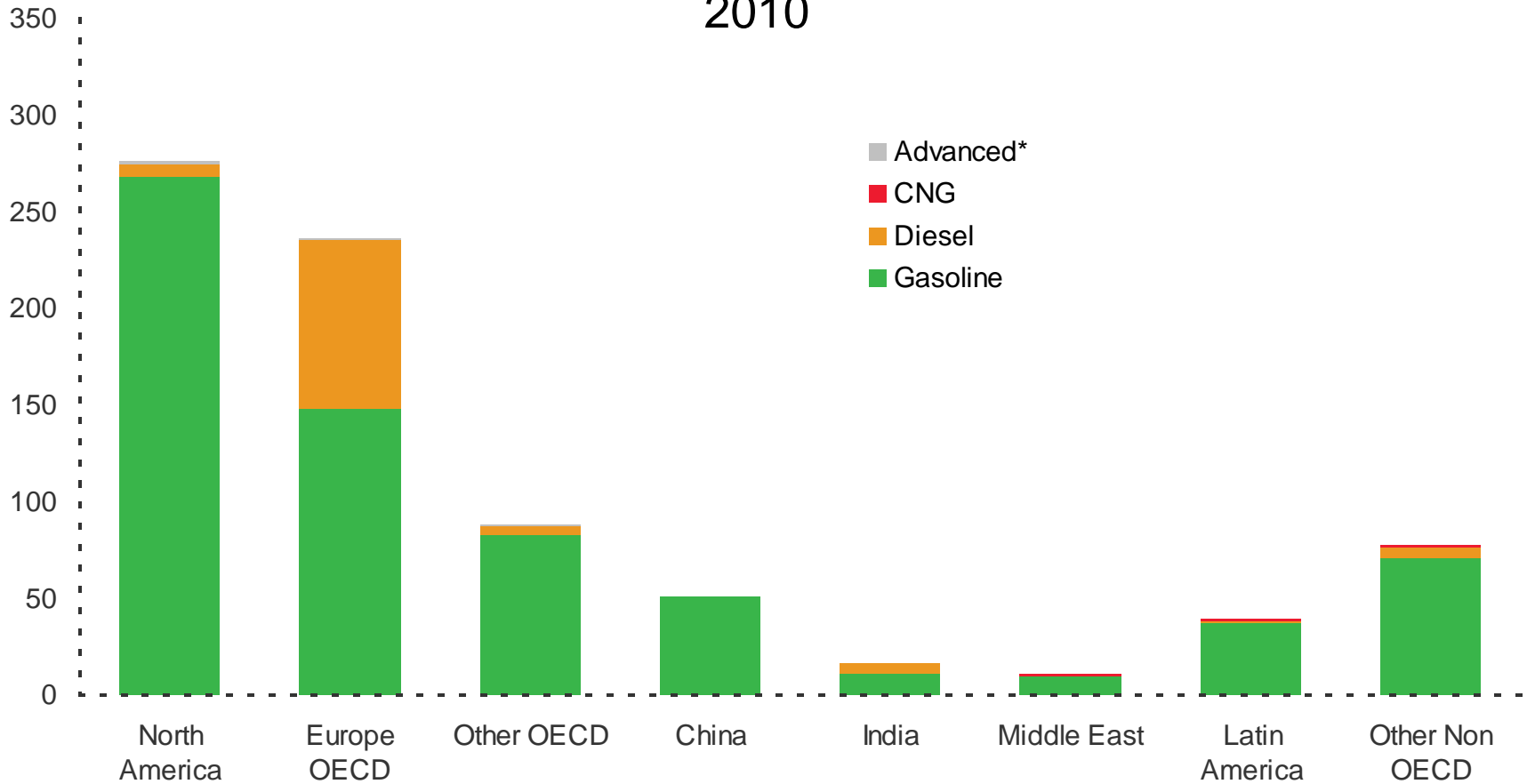
Personal Transportation Fleet Diversifies



Powertrain Technology

Millions of Vehicles

2010



ExxonMobil 2010 Energy Outlook

*Full Hybrid, Plug-in Hybrid, Electric Vehicles

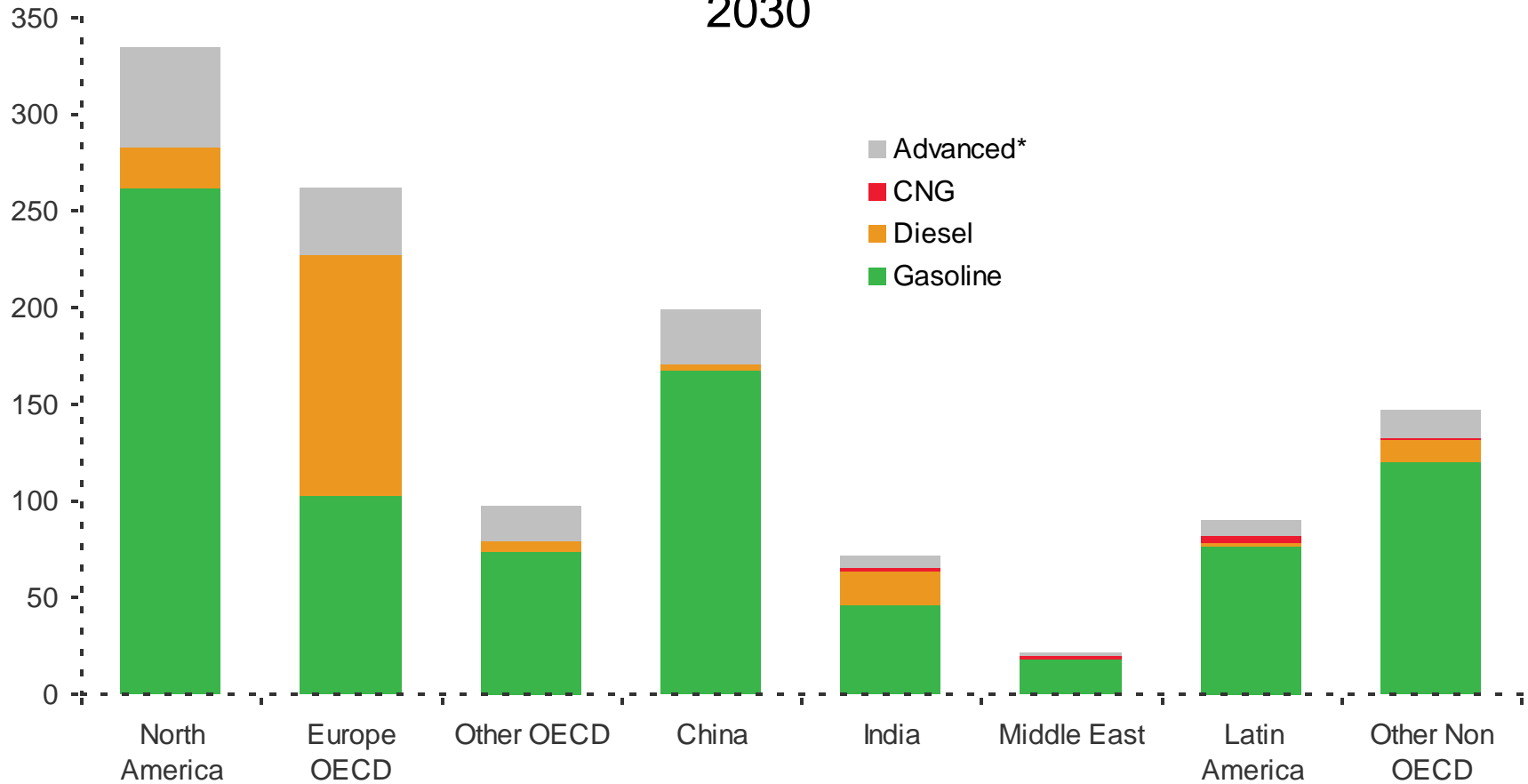
Personal Transportation Fleet Diversifies



Powertrain Technology

Millions of Vehicles

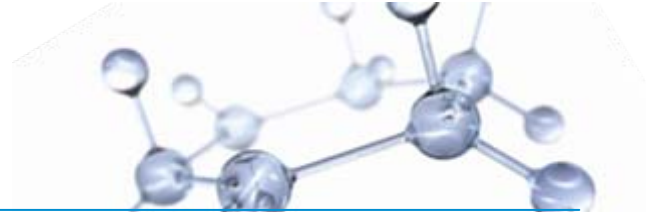
2030



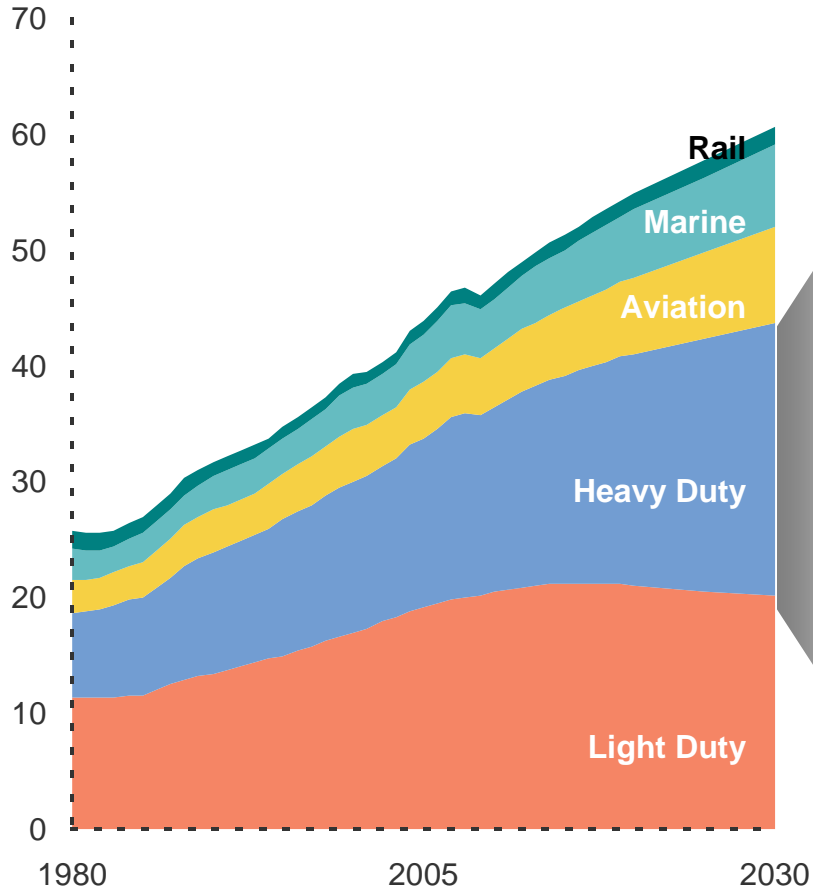
ExxonMobil 2010 Energy Outlook

*Full Hybrid, Plug-in Hybrid, Electric Vehicles

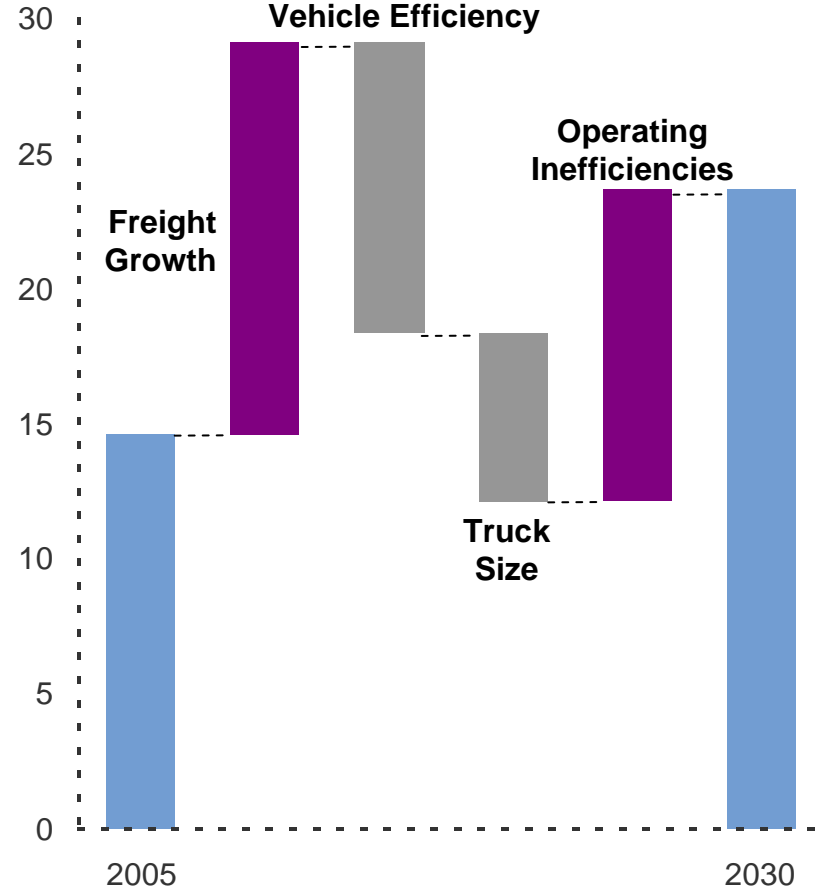
Heavy Duty Dominates Growth



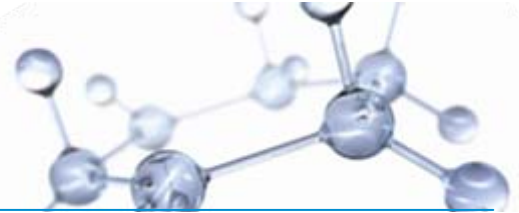
Demand
MBDOE



Heavy Duty Demand Changes
MBDOE

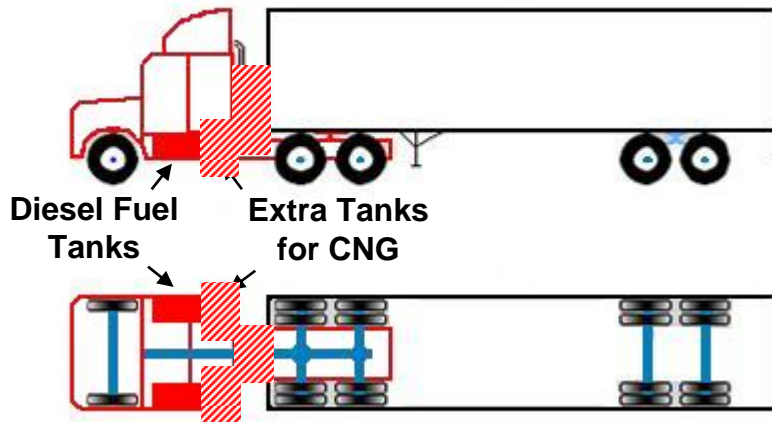
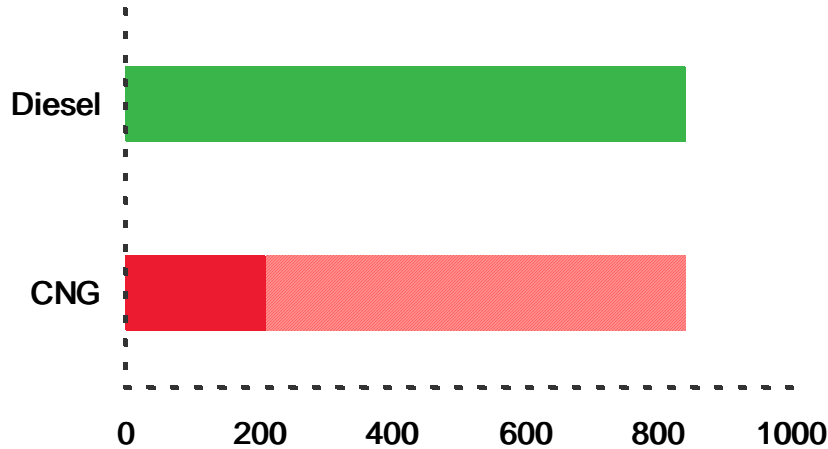


Costs Impact U.S. Heavy Duty Choices



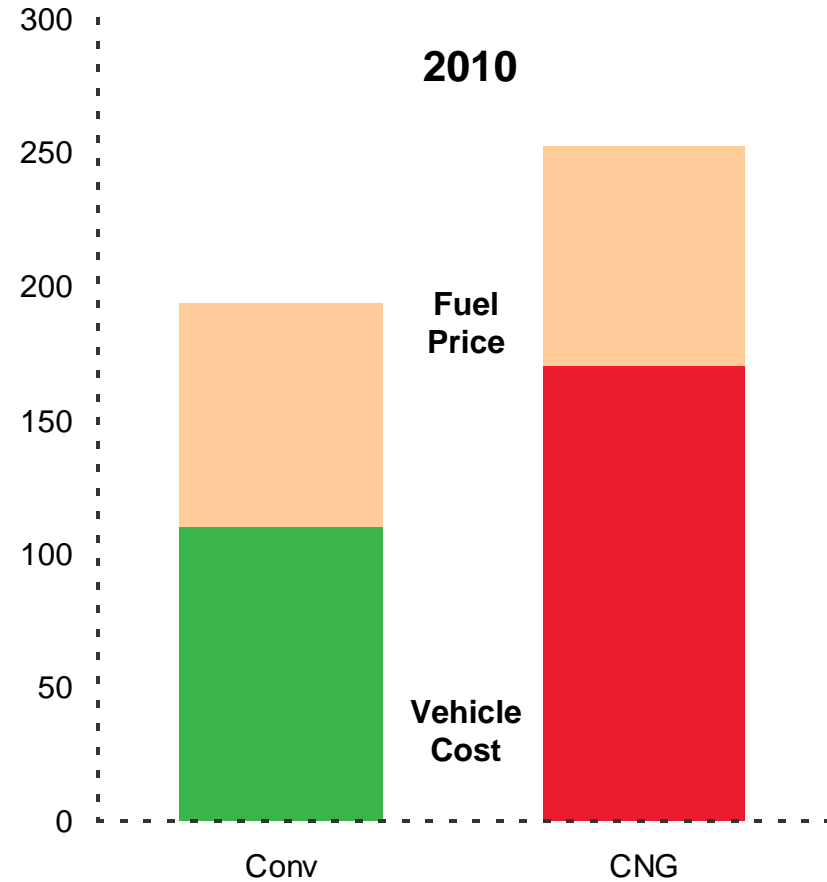
Distance per Fill Up

Miles

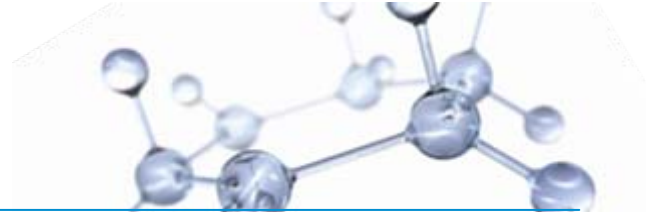


5-Year Cost of Ownership

\$k

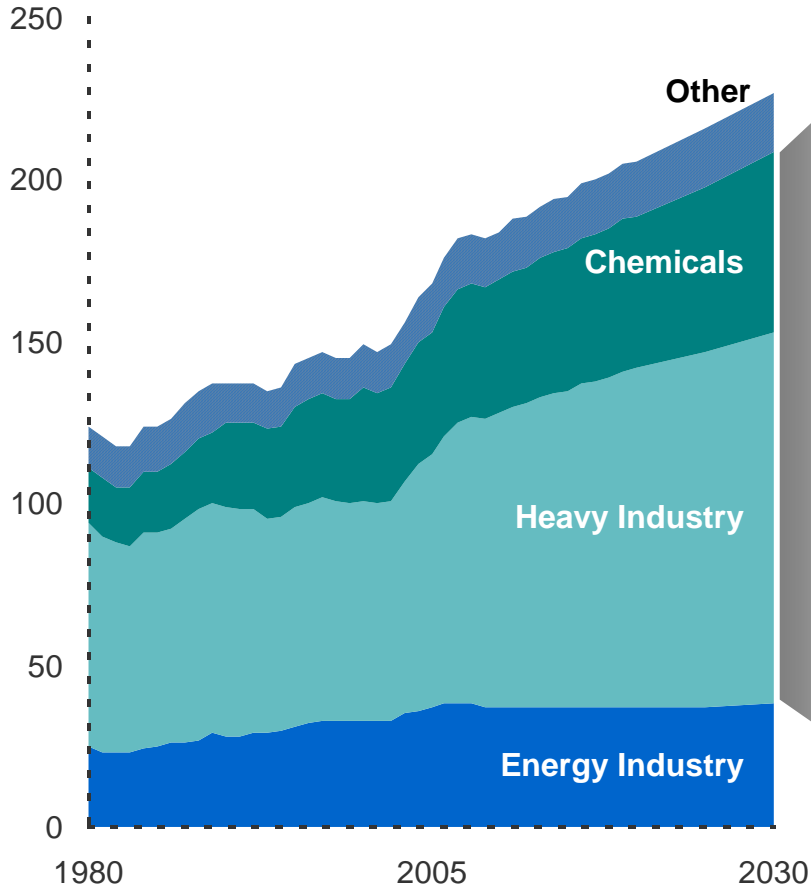


Industry Energy Demand Increases



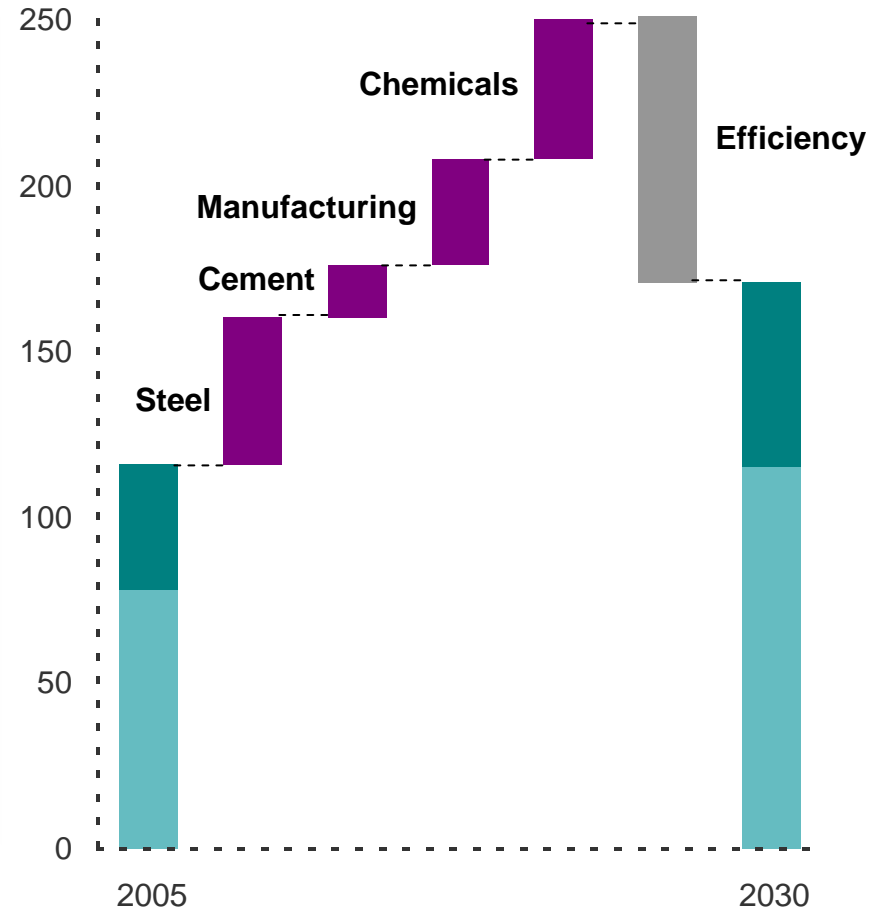
Demand

Quadrillion BTUs

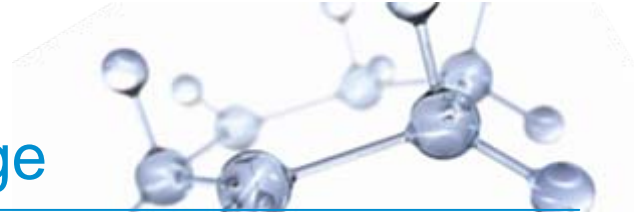


Heavy Industry & Chemicals Demand Changes

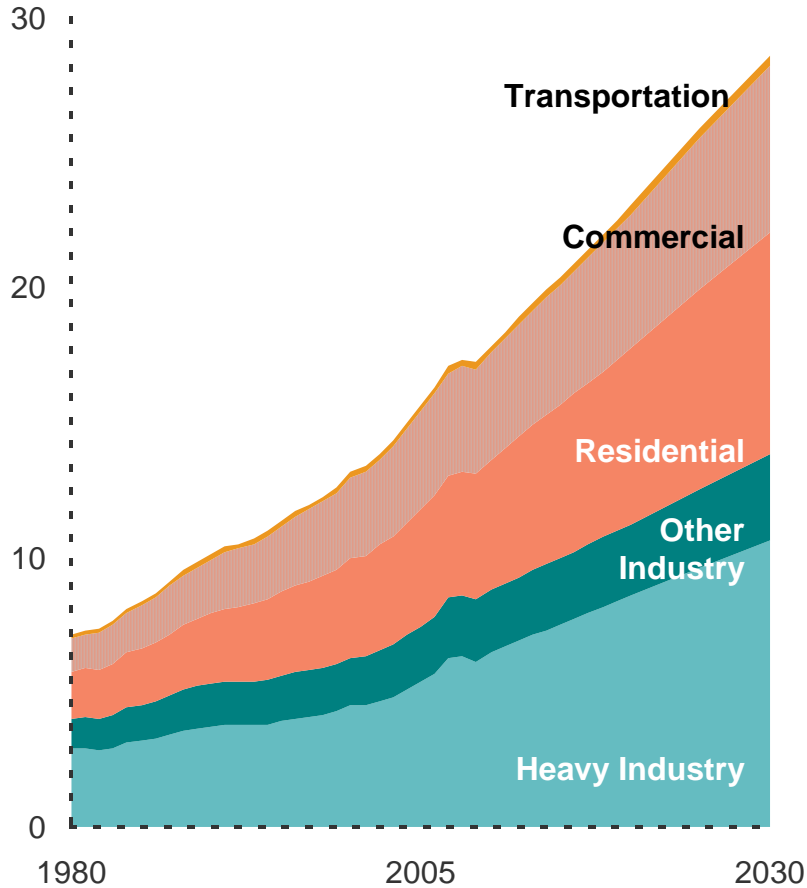
Quadrillion BTUs



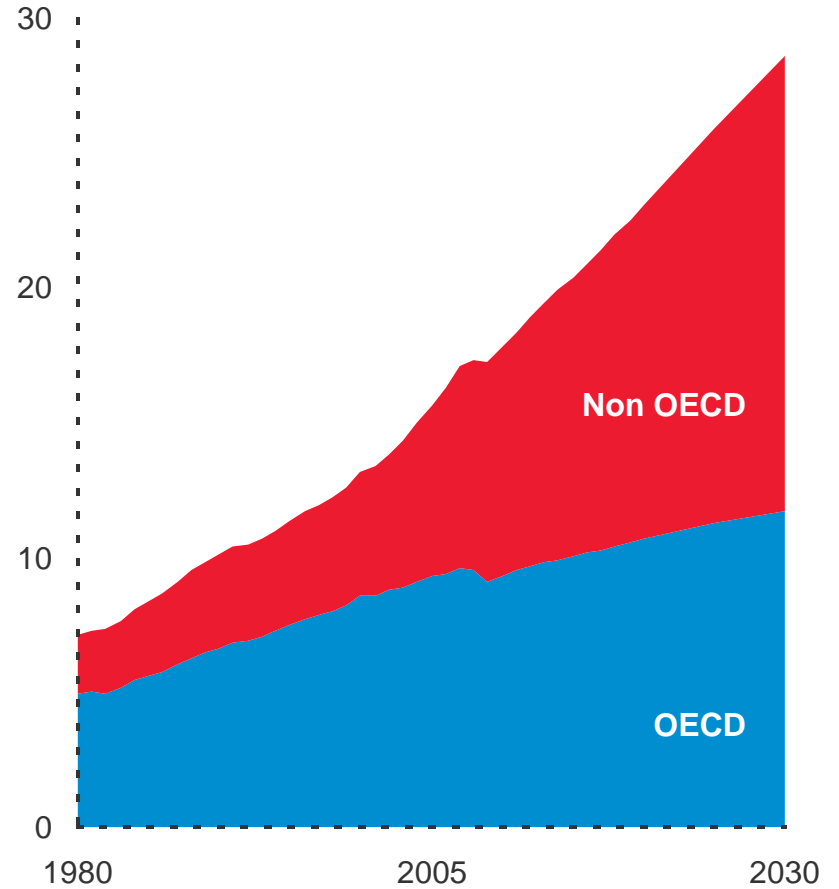
Electricity Demand Continues to Surge



By Sector
k TWh

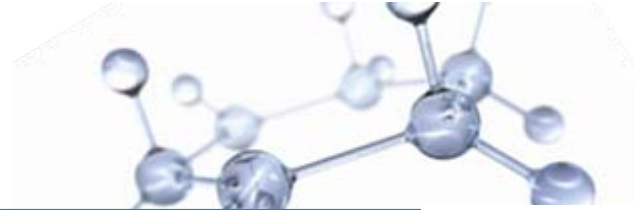


By Region
k TWh



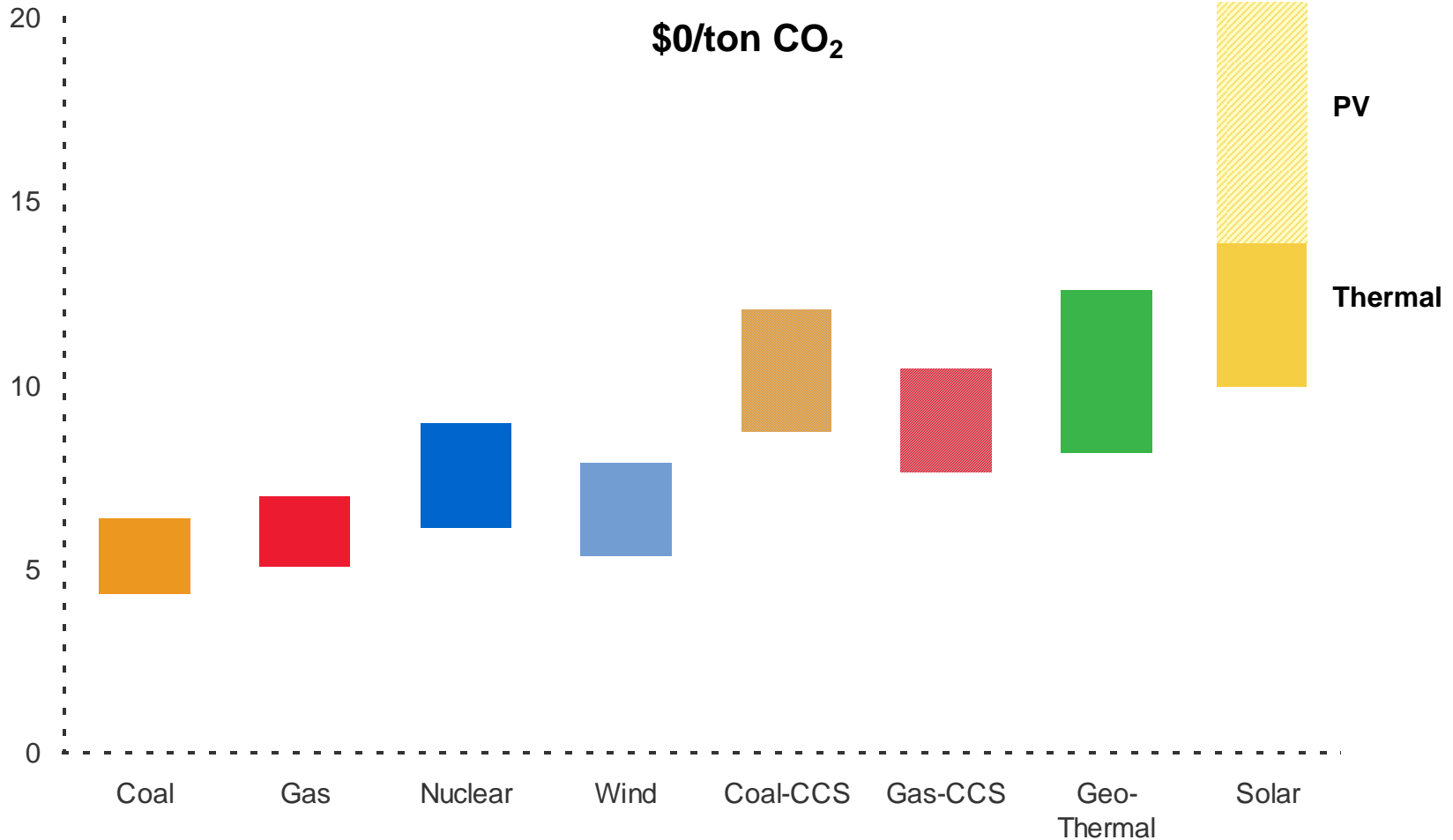
ExxonMobil 2010 Energy Outlook

Economic Choices for U.S. Power

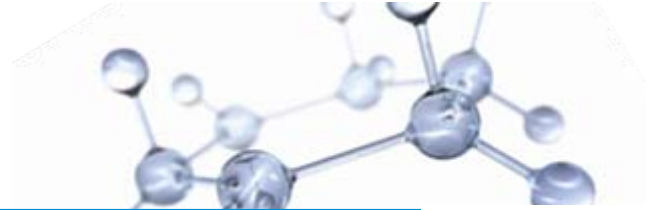


Baseload, Startup 2025

2010 cents/kWh

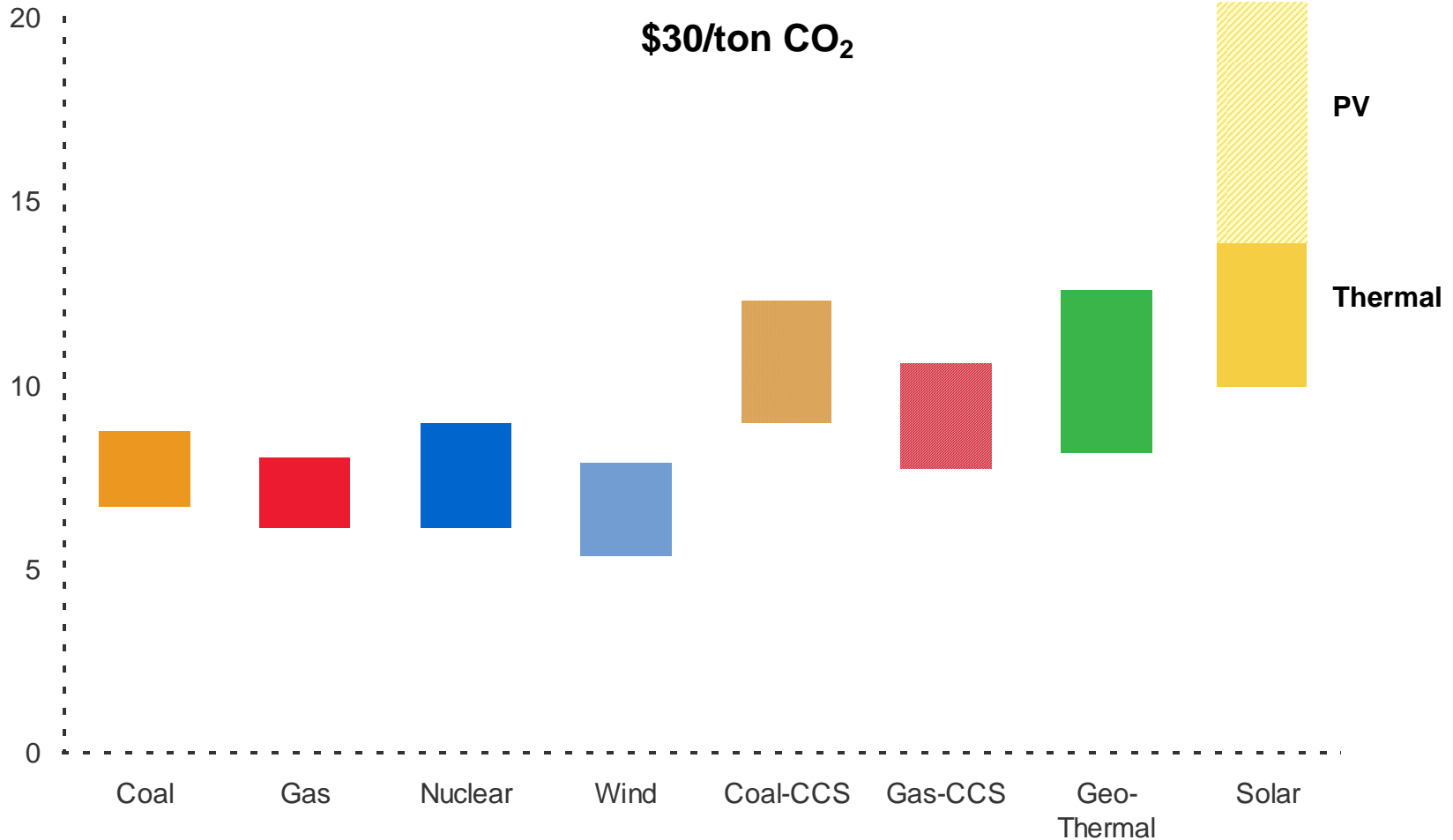


Economic Choices for U.S. Power



Baseload, Startup 2025

2010 cents/kWh

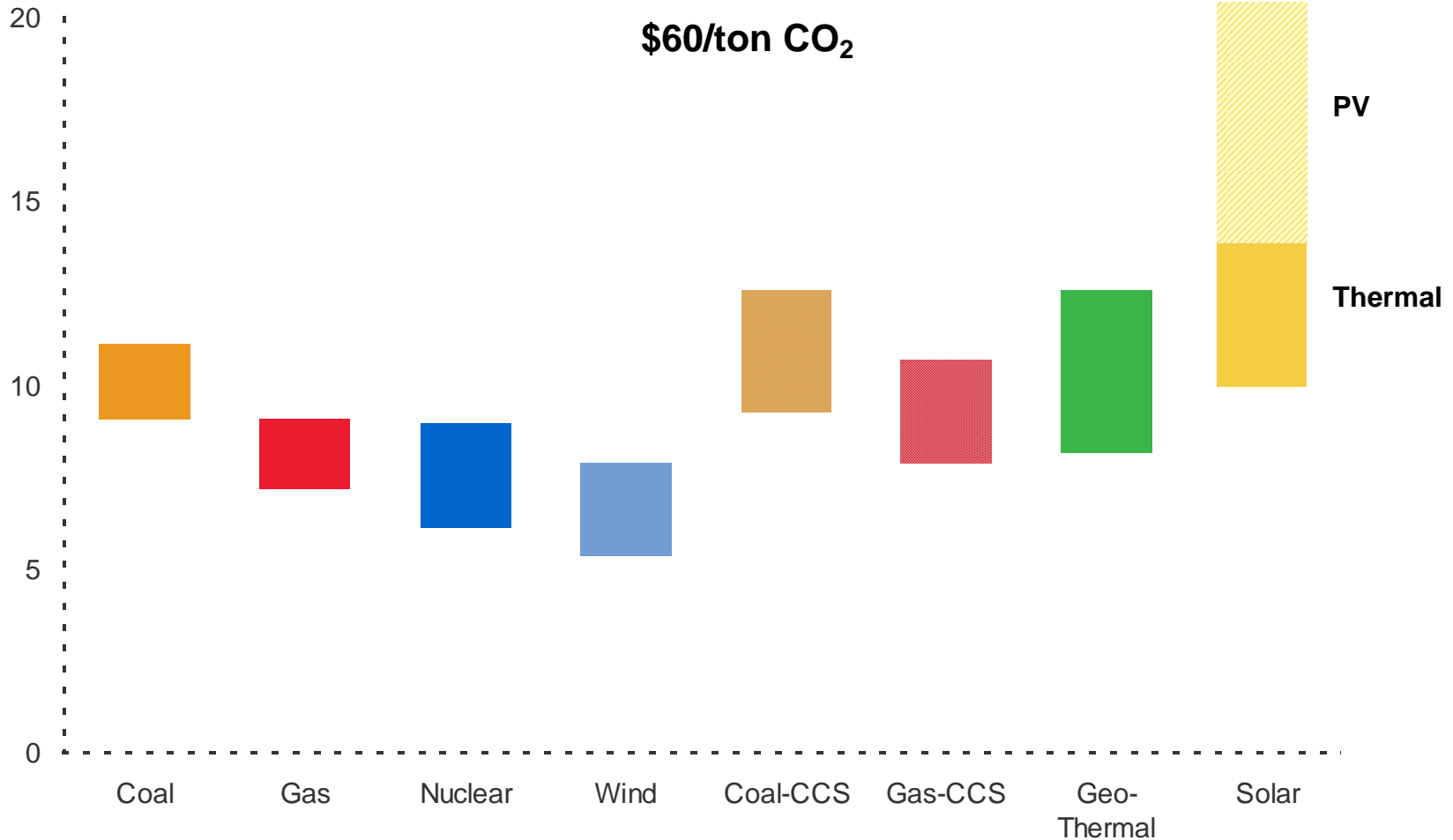


Economic Choices for U.S. Power



Baseload, Startup 2025

2010 cents/kWh

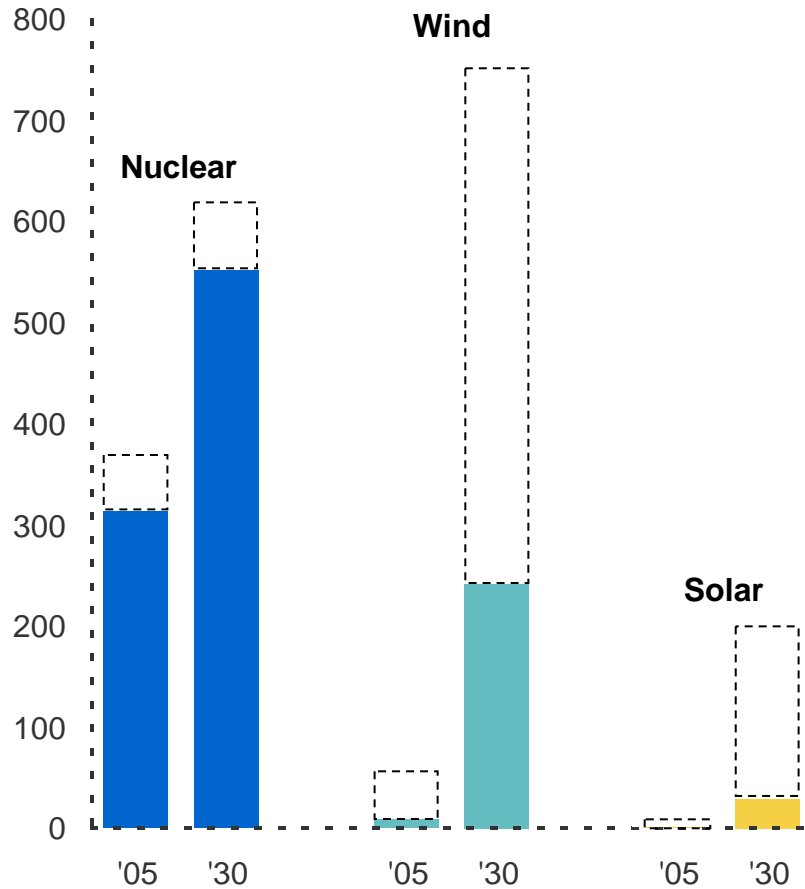


Power Generation Mix Evolves



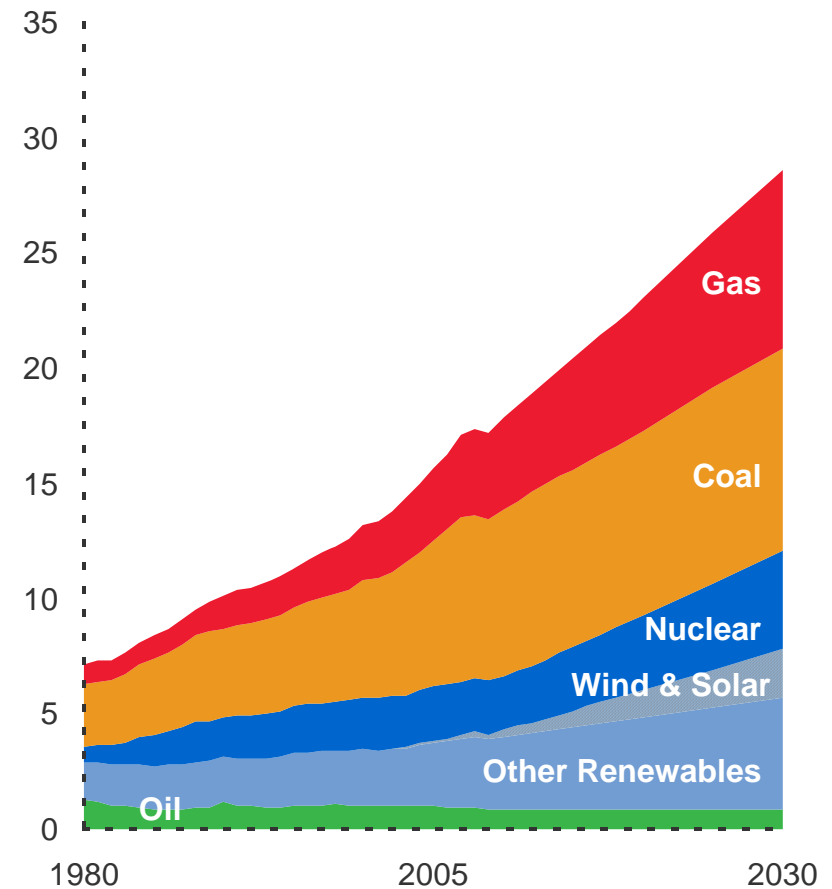
Global Capacity Utilized

GW



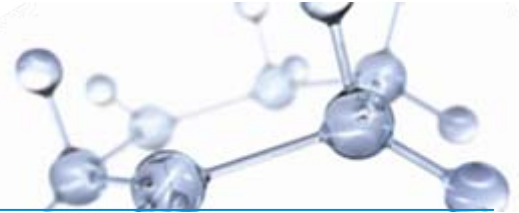
By Generation

k TWh



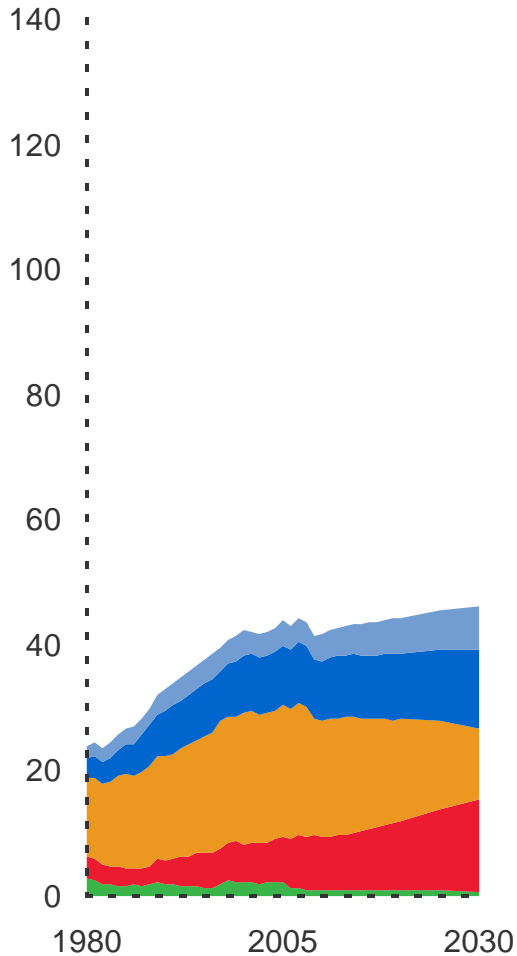
ExxonMobil 2010 Energy Outlook

Regional Needs Drive Fuels for Power



North America

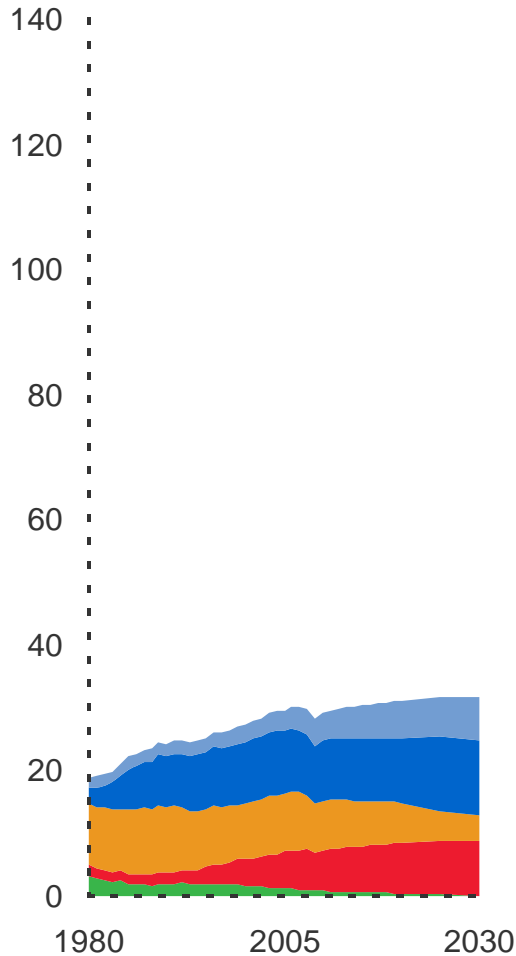
Quadrillion BTUs



ExxonMobil 2010 Energy Outlook

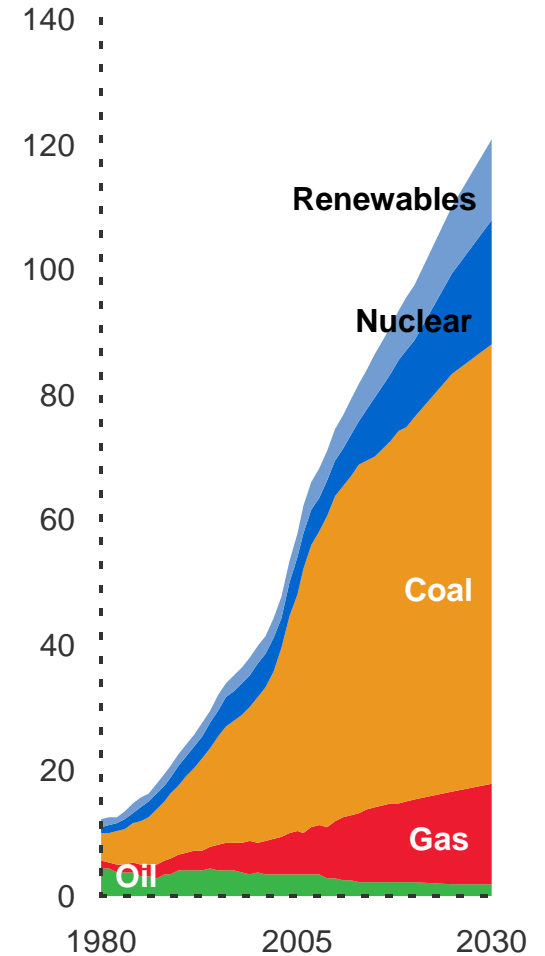
Europe

Quadrillion BTUs

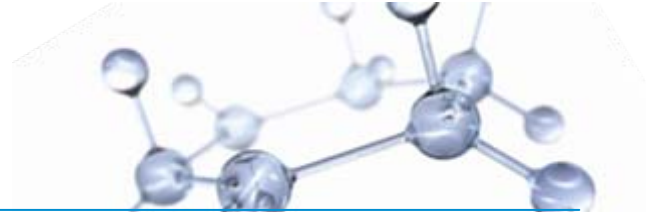


Asia Pacific

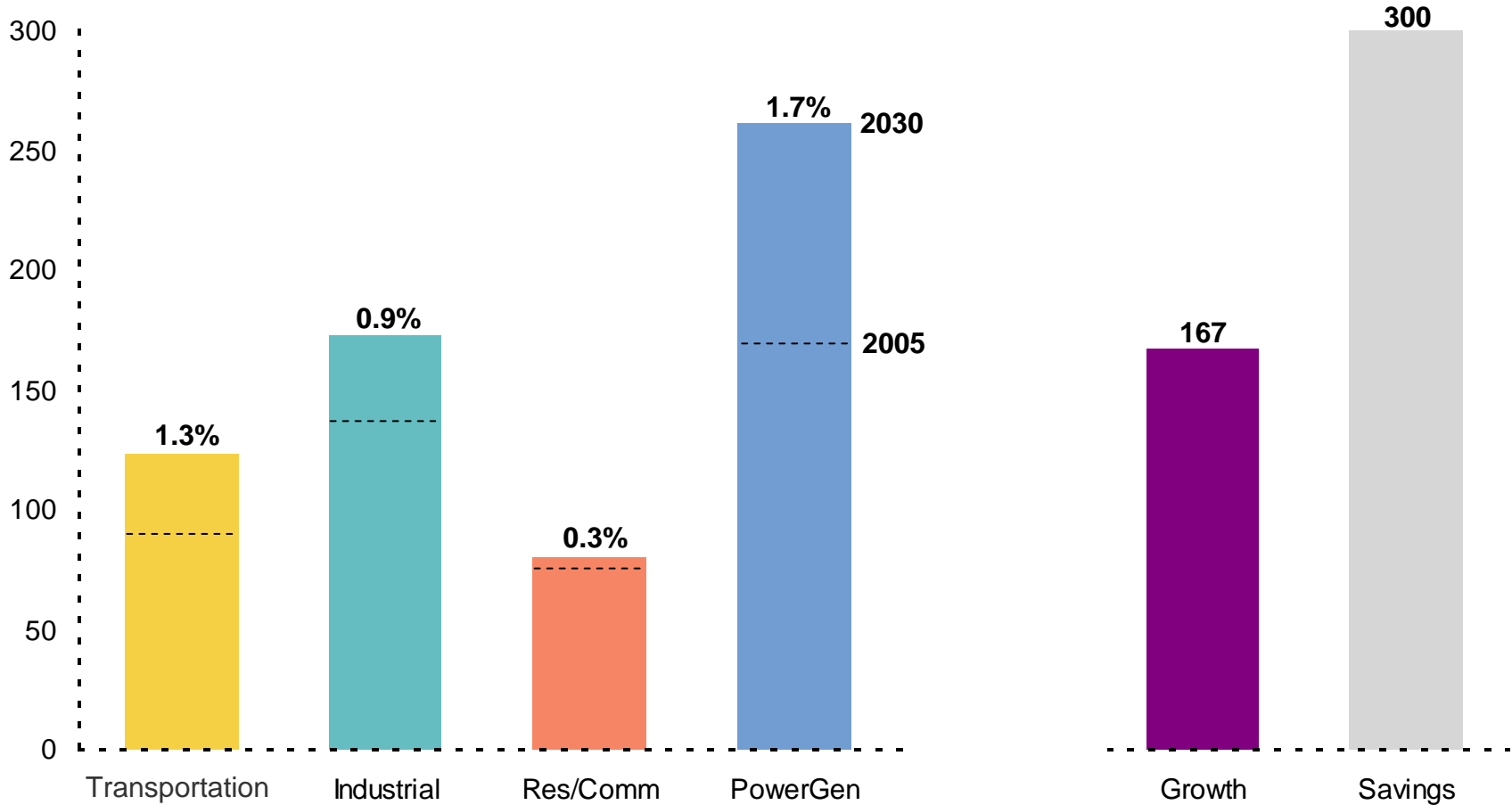
Quadrillion BTUs



Power Generation Leads Growth



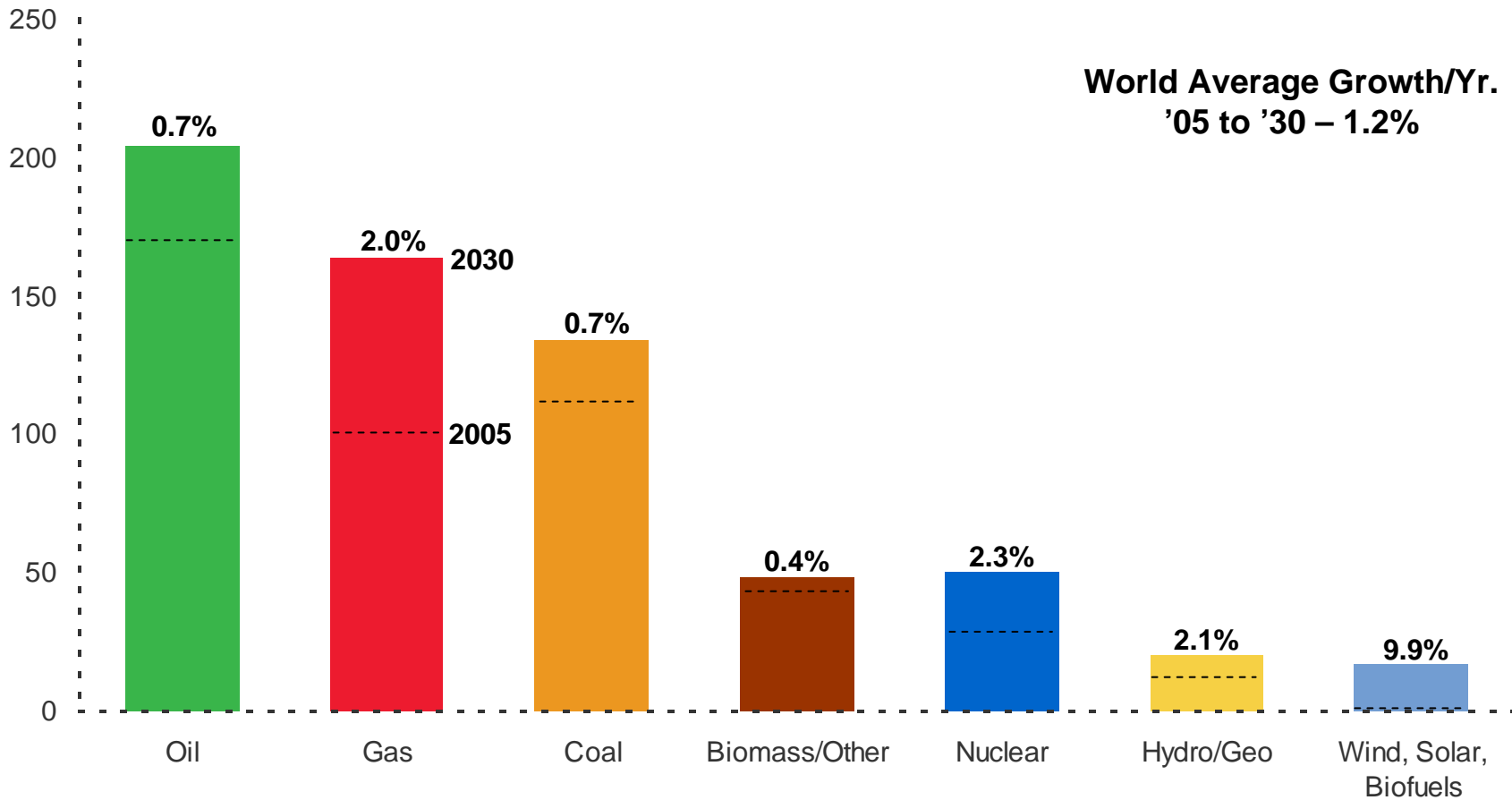
Quadrillion BTUs



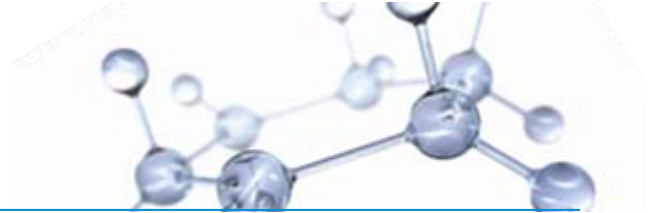
Energy Mix Continues to Evolve



Quadrillion BTUs

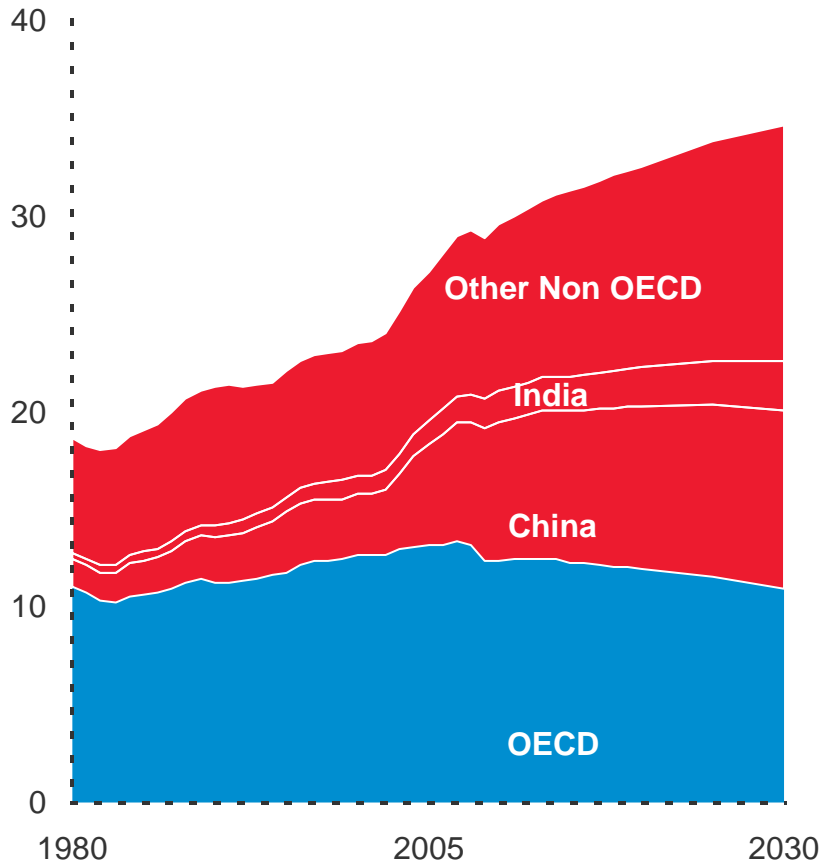


CO₂ Emissions Moderate



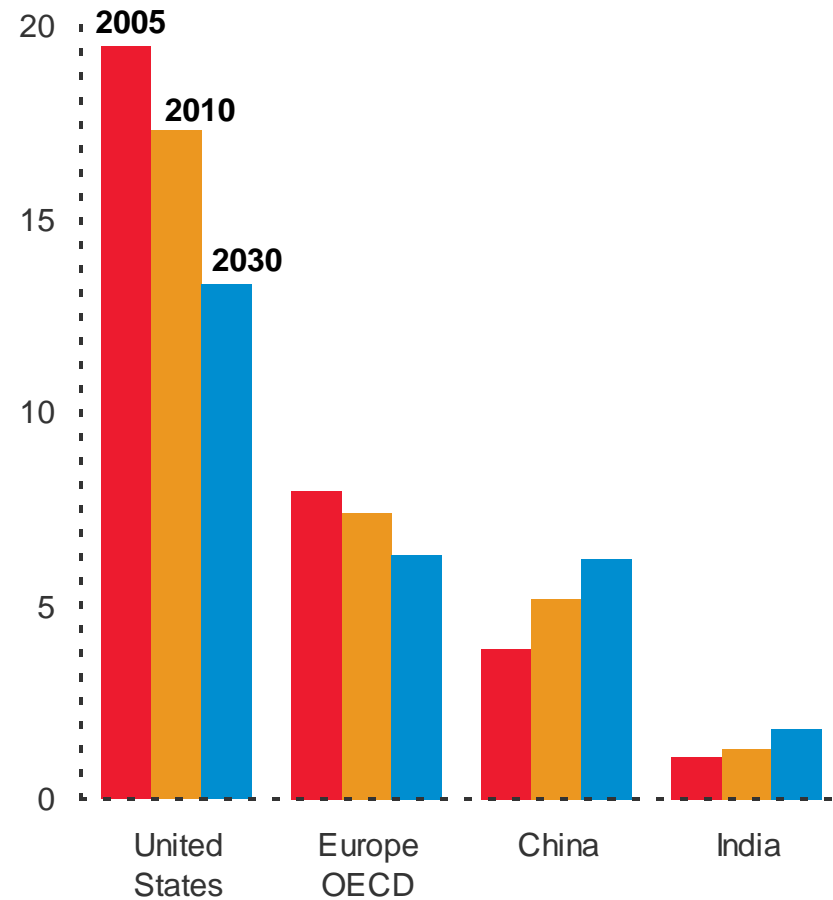
By Region

Billion Tons

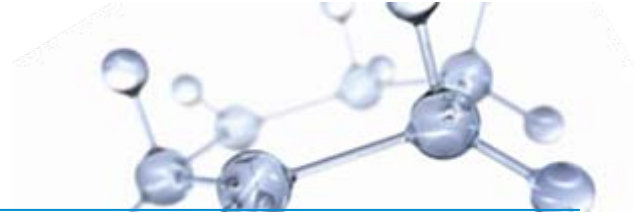


Emissions per Capita

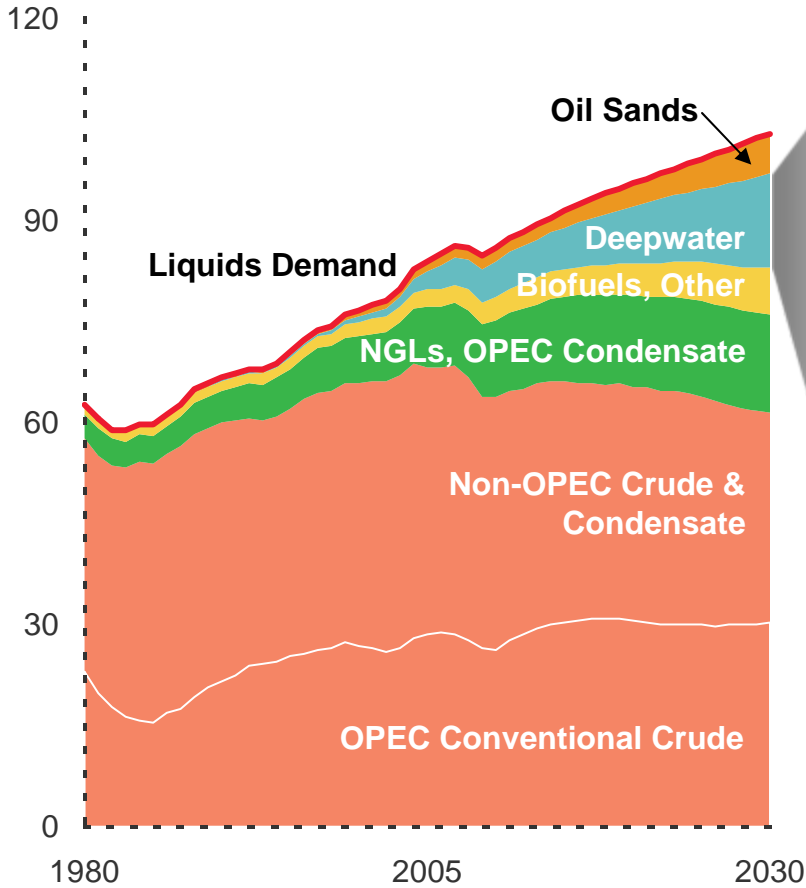
Tons per Person



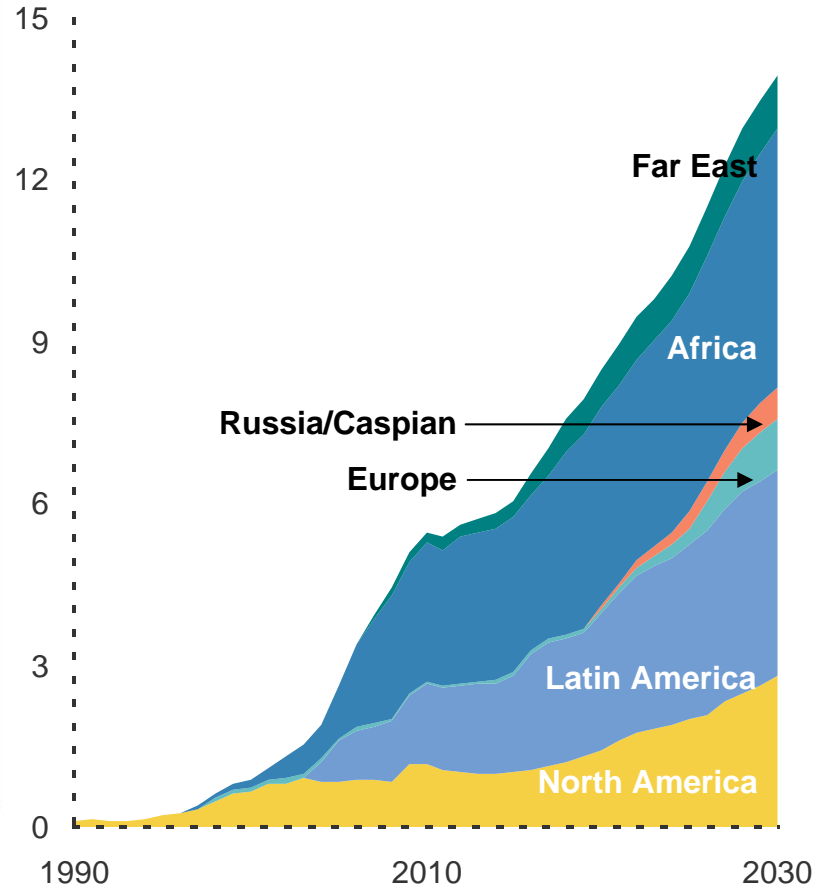
Deepwater Supply Expands Globally



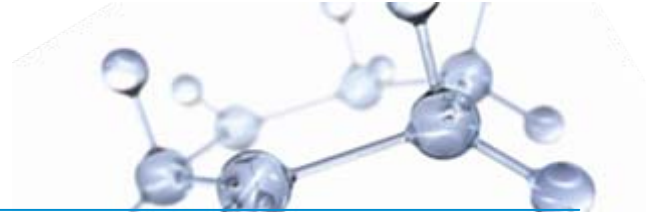
Global
MBDOE



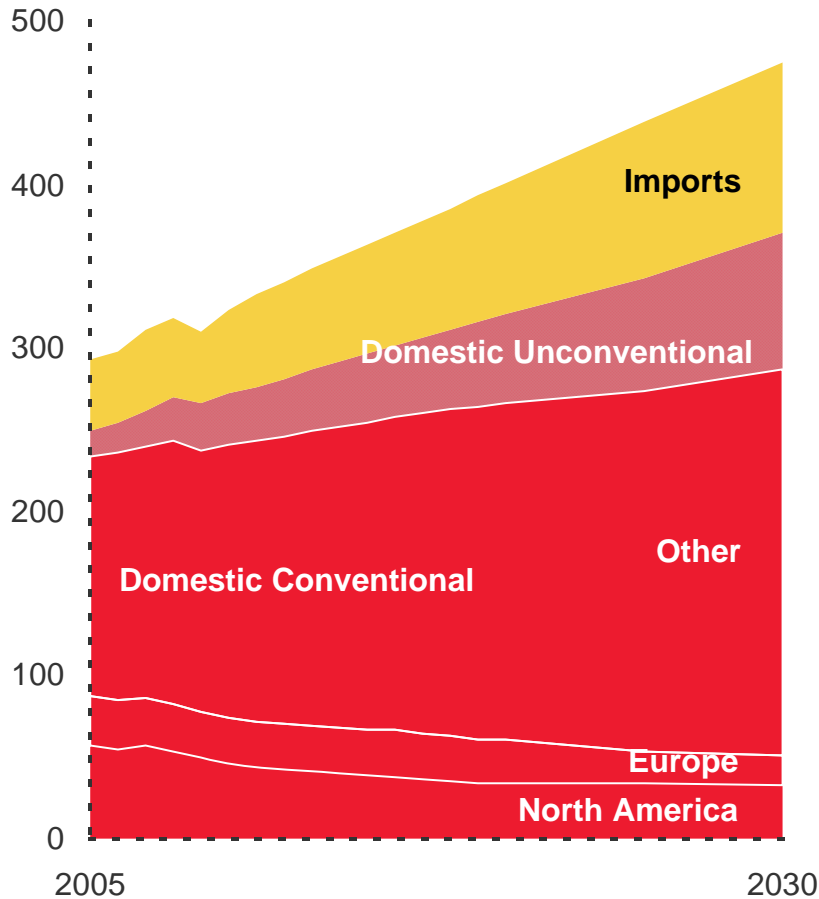
By Region
MBDOE



Natural Gas Supplies Diversify

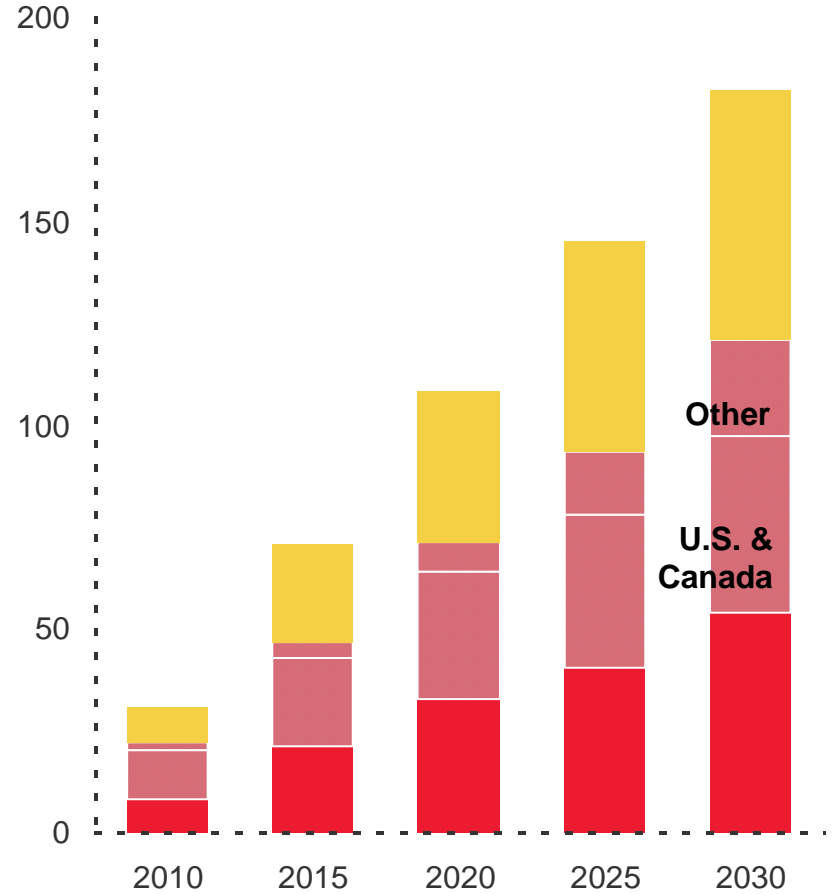


Supply
BCFD

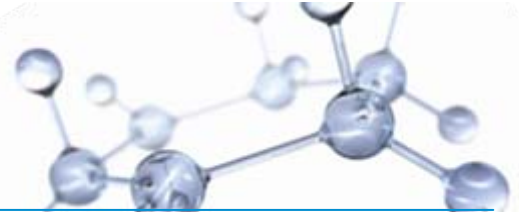


ExxonMobil 2010 Energy Outlook

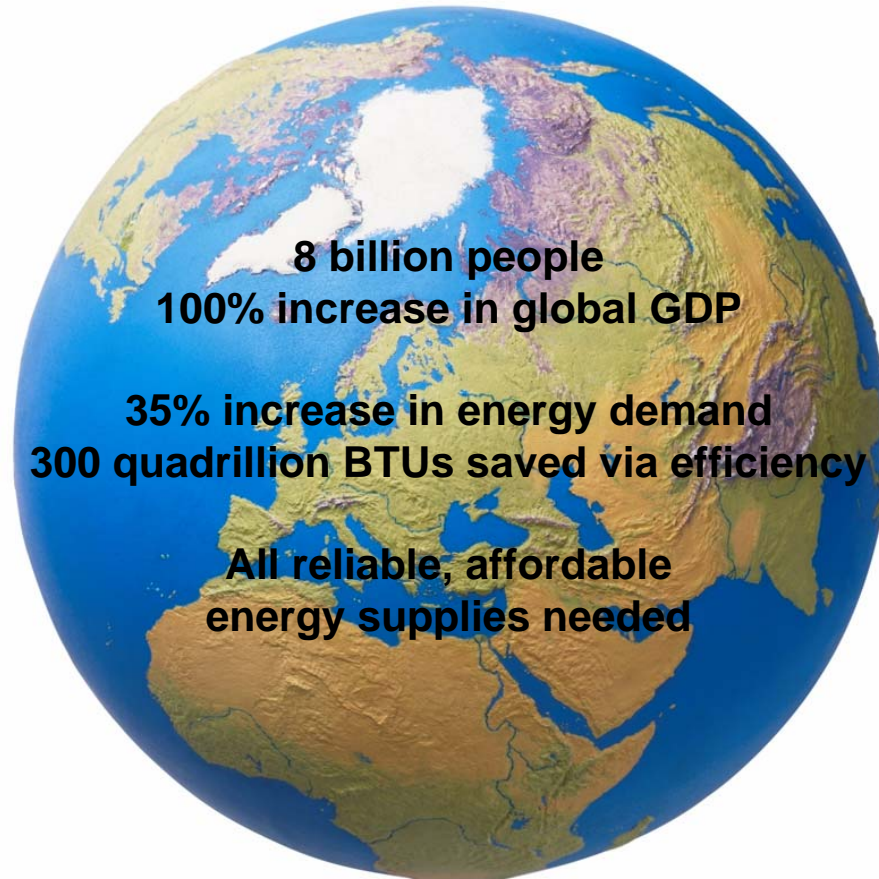
Growth 2005 to 2030
BCFD



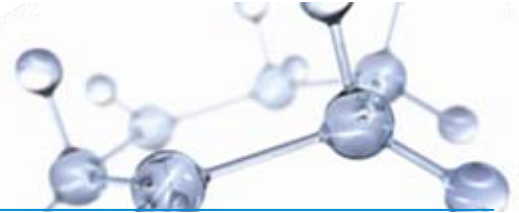
Development Challenges and Solutions



World development continues, while lives improve and economies grow



Development Challenges and Solutions



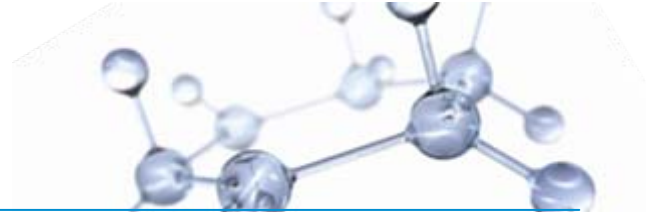
**Increase
Efficiency**



**Mitigate
Emissions**

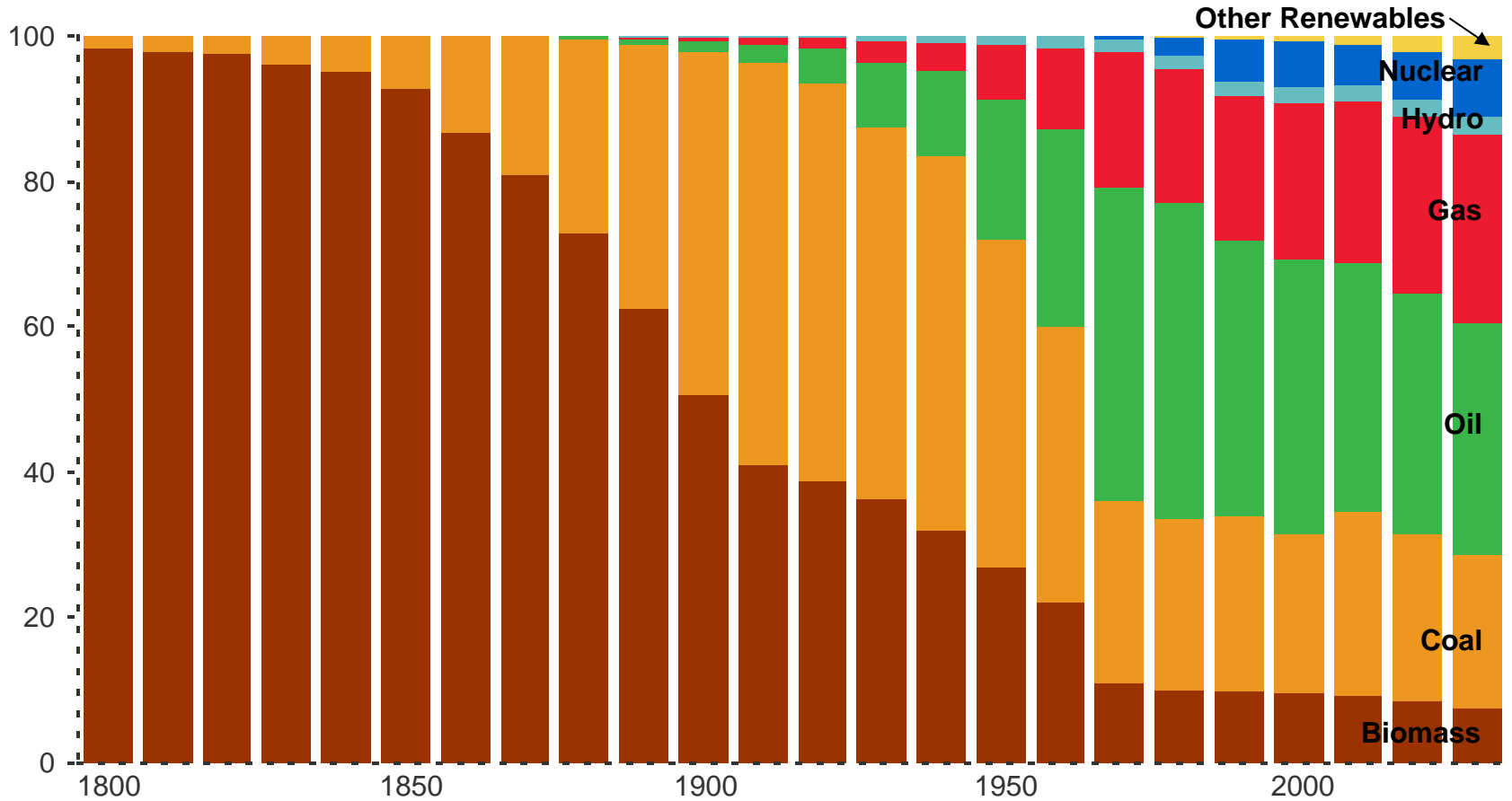
**Expand
Supplies**

Energy Needs Evolve Over Time

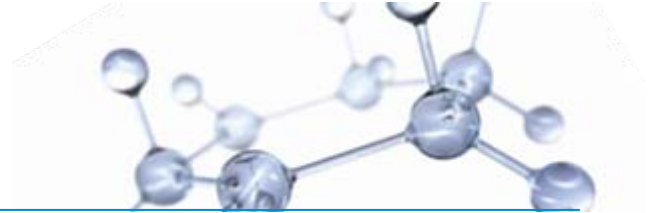


Global Demand By Fuel

Percent



ExxonMobil 2010 Energy Outlook



More information available at:
www.exxonmobil.com/energyoutlook