

**ExxonMobil**

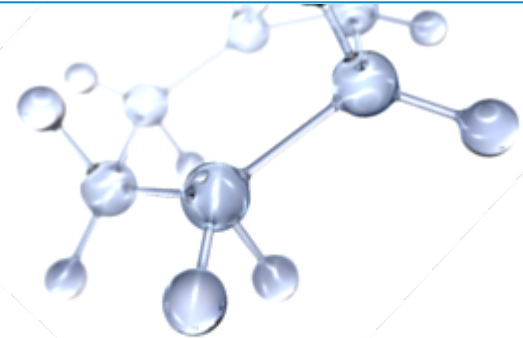
Taking on the world's toughest energy challenges.™

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# The Outlook for Energy

## a view to 2030

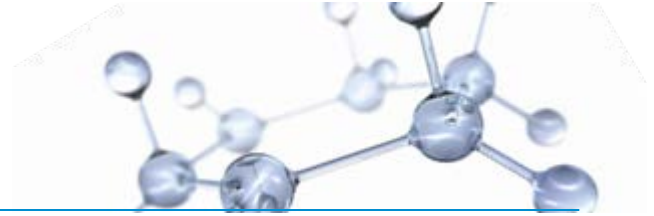
Rob Gardner  
Baker Institute  
December 2, 2011



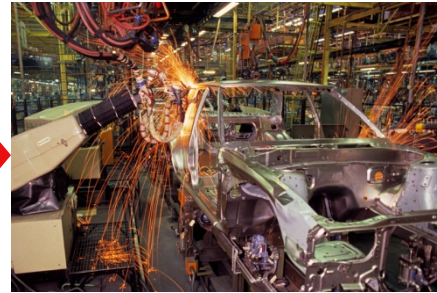
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This presentation includes forward-looking statements. Actual future conditions (including economic conditions, energy demand, and energy supply) could differ materially due to changes in technology, the development of new supply sources, political 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](http://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...**

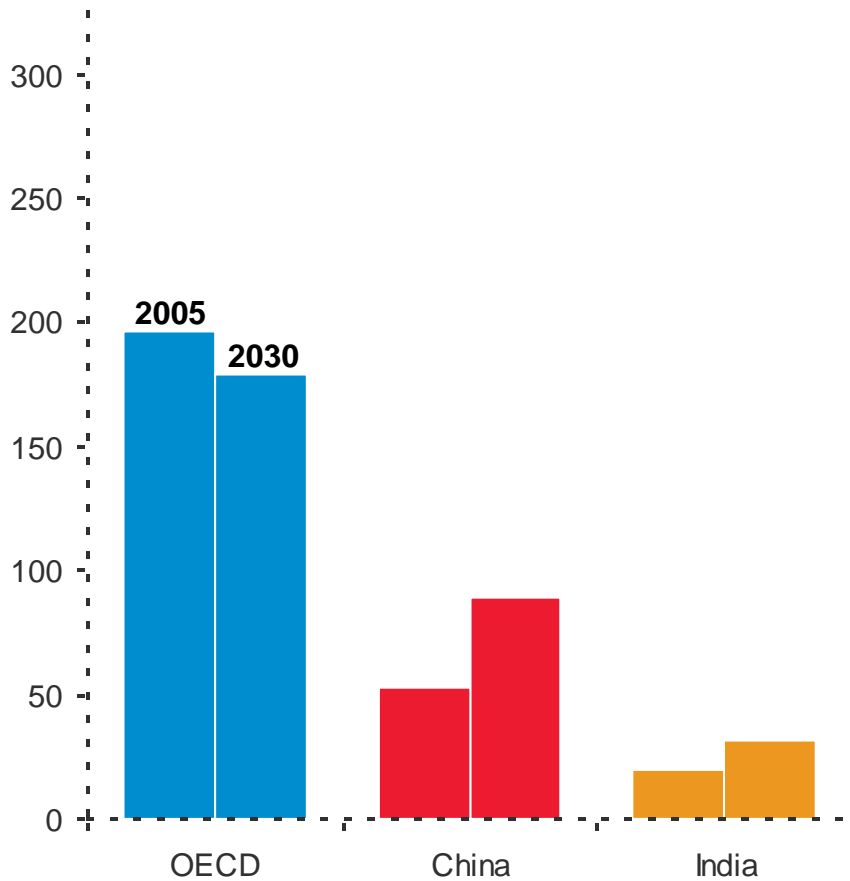


**... energy needs evolve as well**

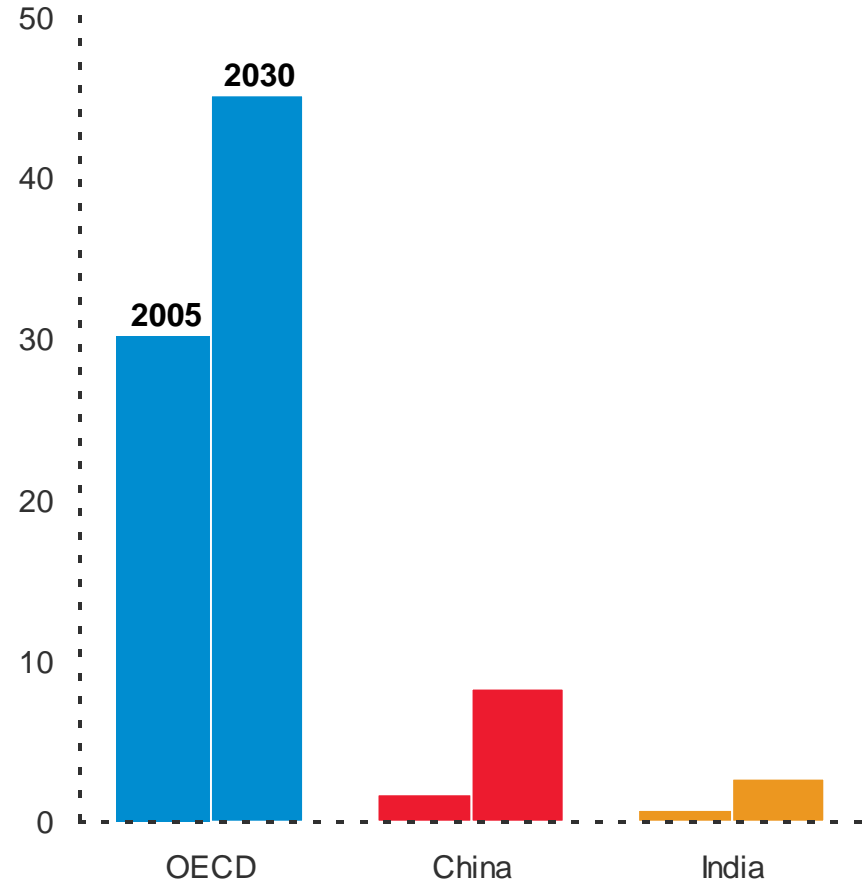
# Energy and Prosperity Linked



**Energy per Capita**  
MBTU



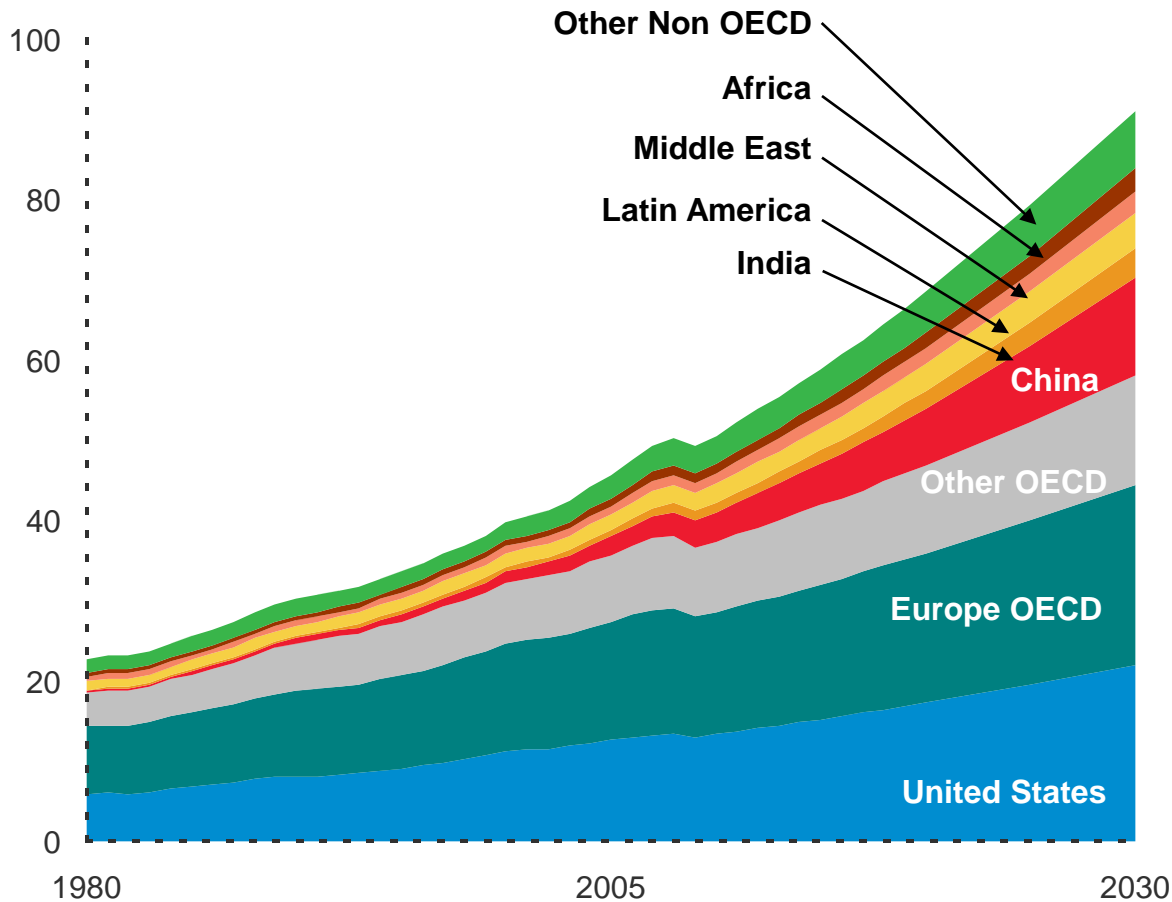
**GDP per Capita**  
2005 \$k



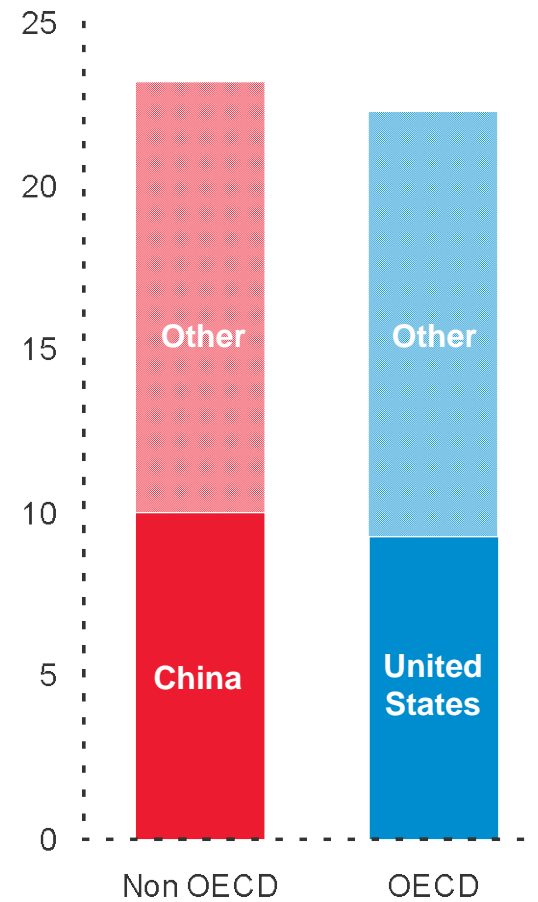
# Economic Growth Continues



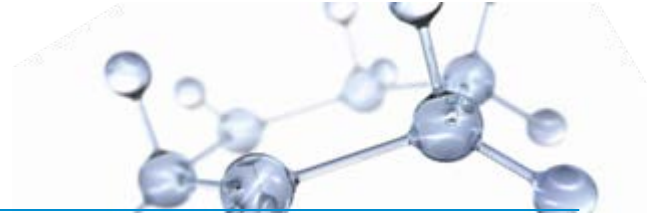
**GDP**  
Trillion 2005\$



**GDP Growth 2005 to 2030**  
Trillion 2005\$

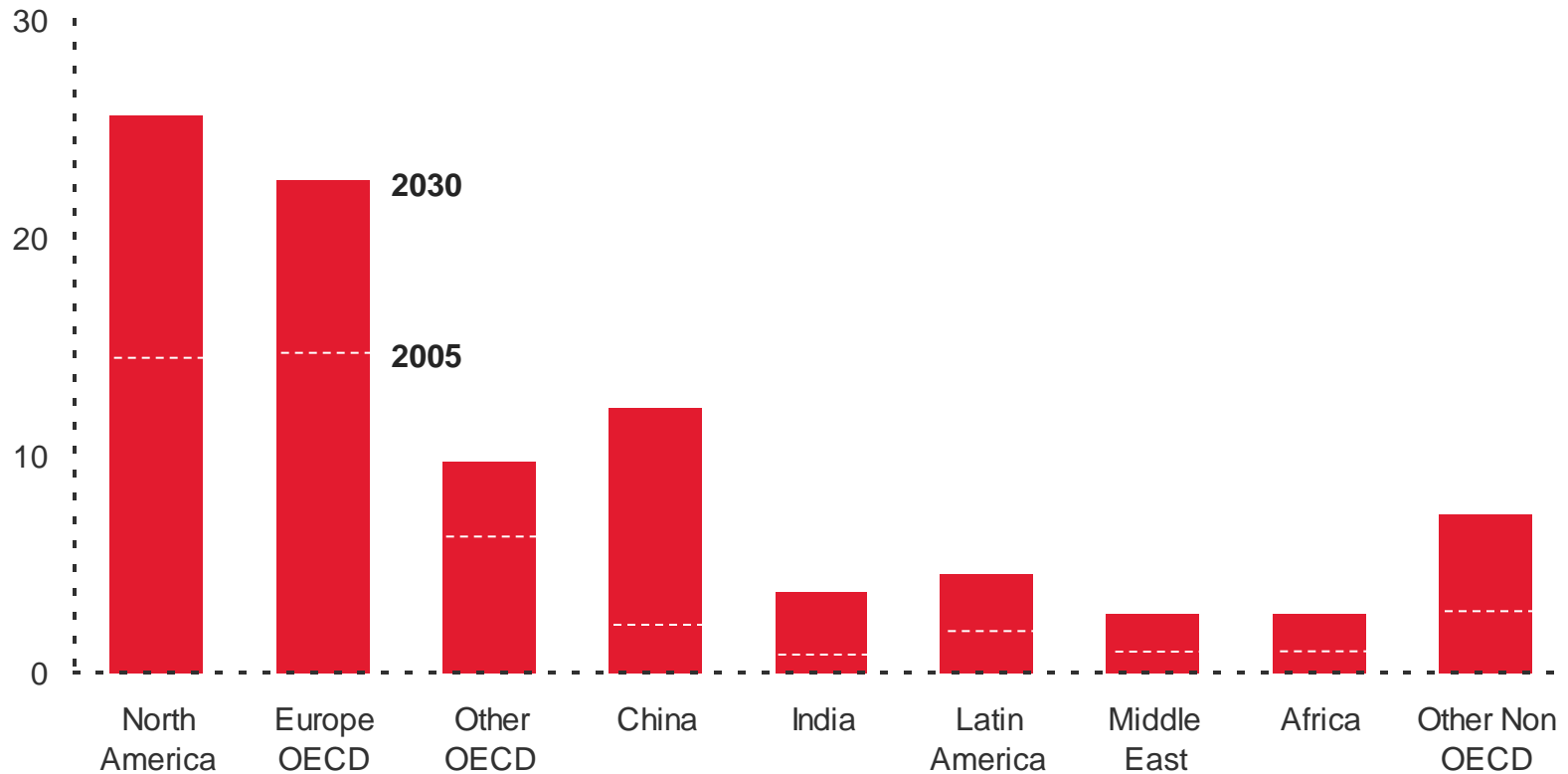


# GDP Grows Globally



## By Region

Trillion 2005\$ GDP

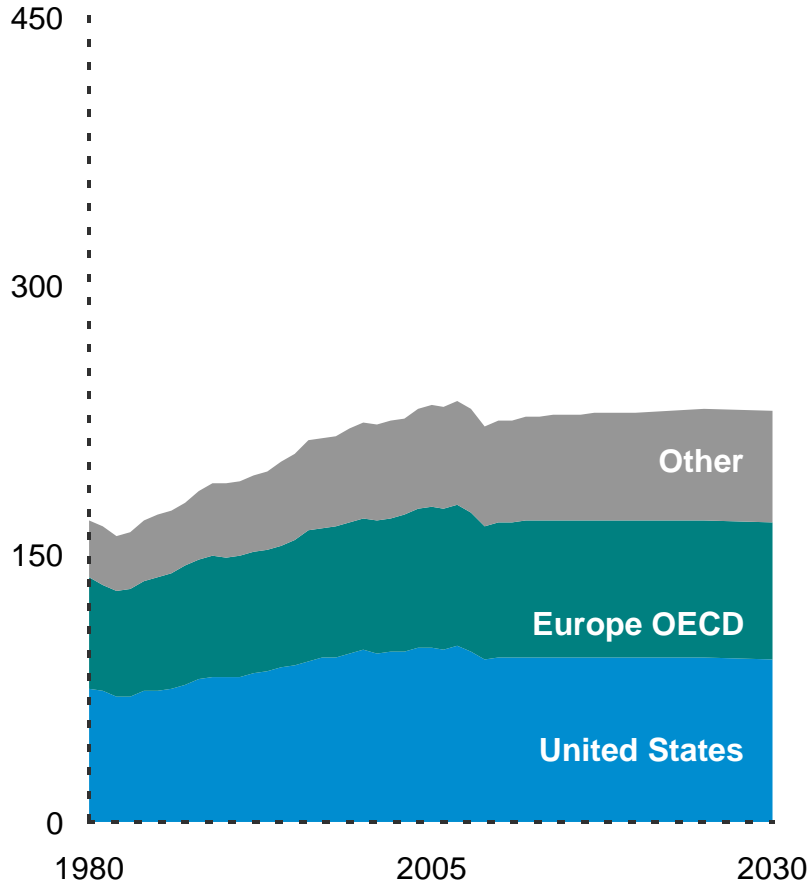


# Expansion Economies Drive Demand



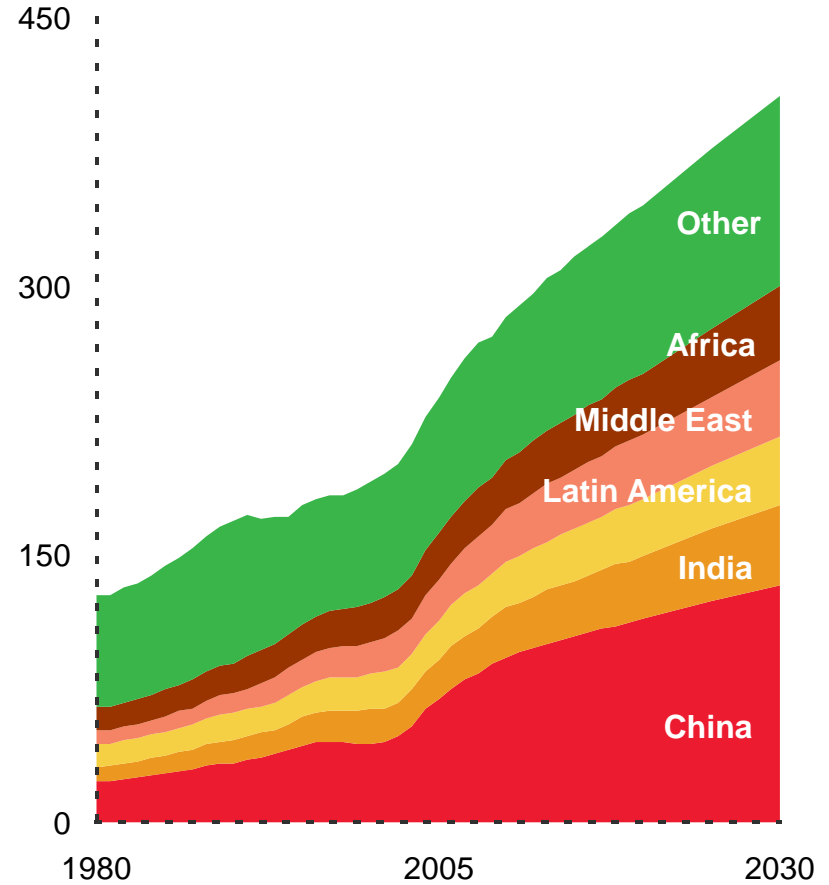
## OECD

Quadrillion BTUs



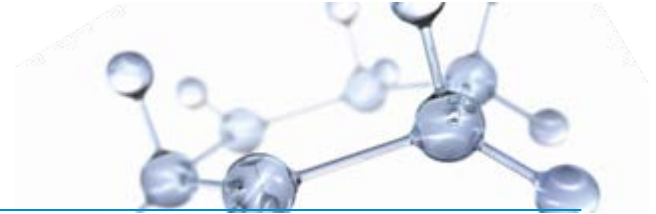
## Non OECD

Quadrillion BTUs



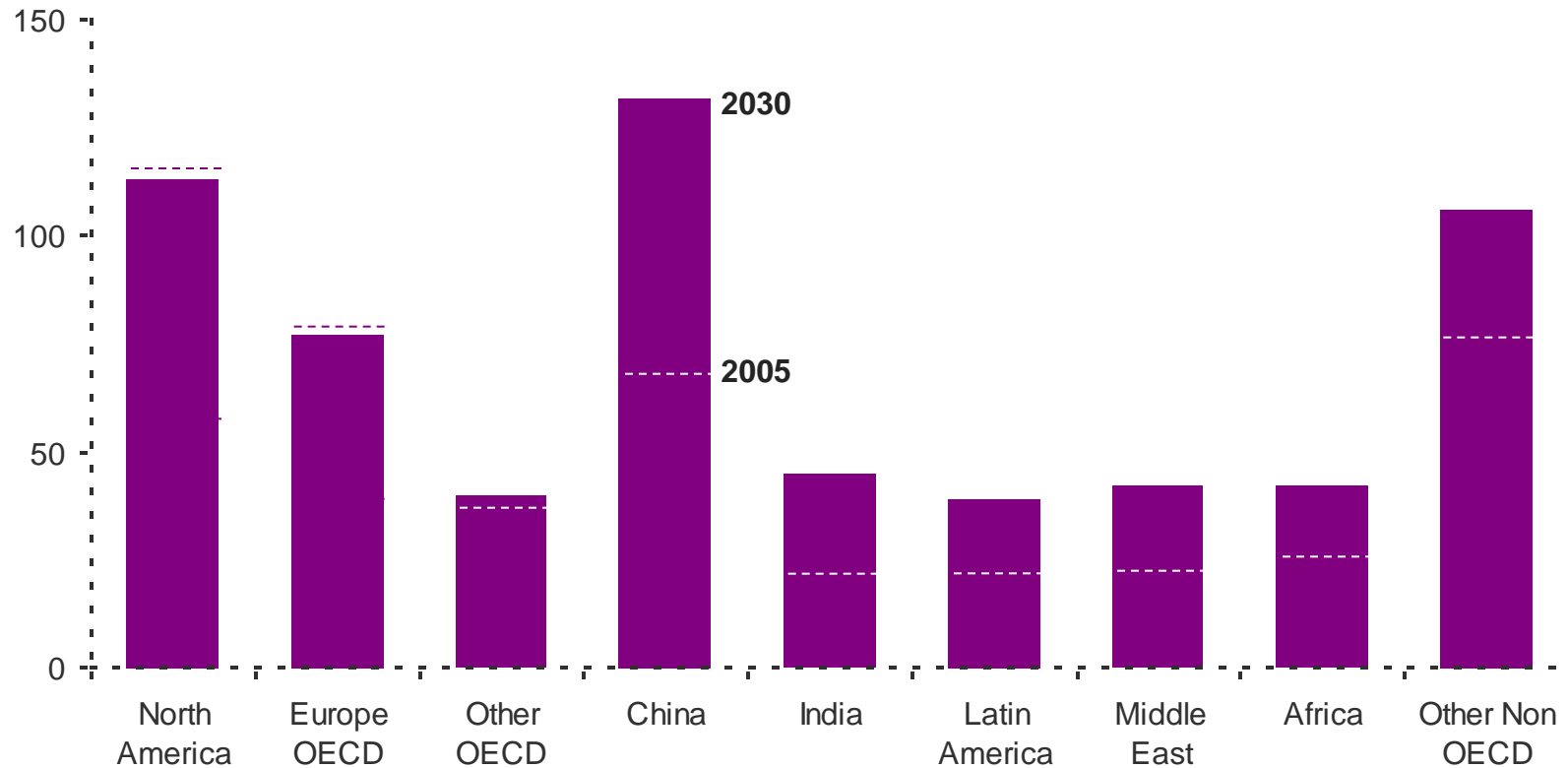
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# Energy Demand Shifts Globally



## By Region

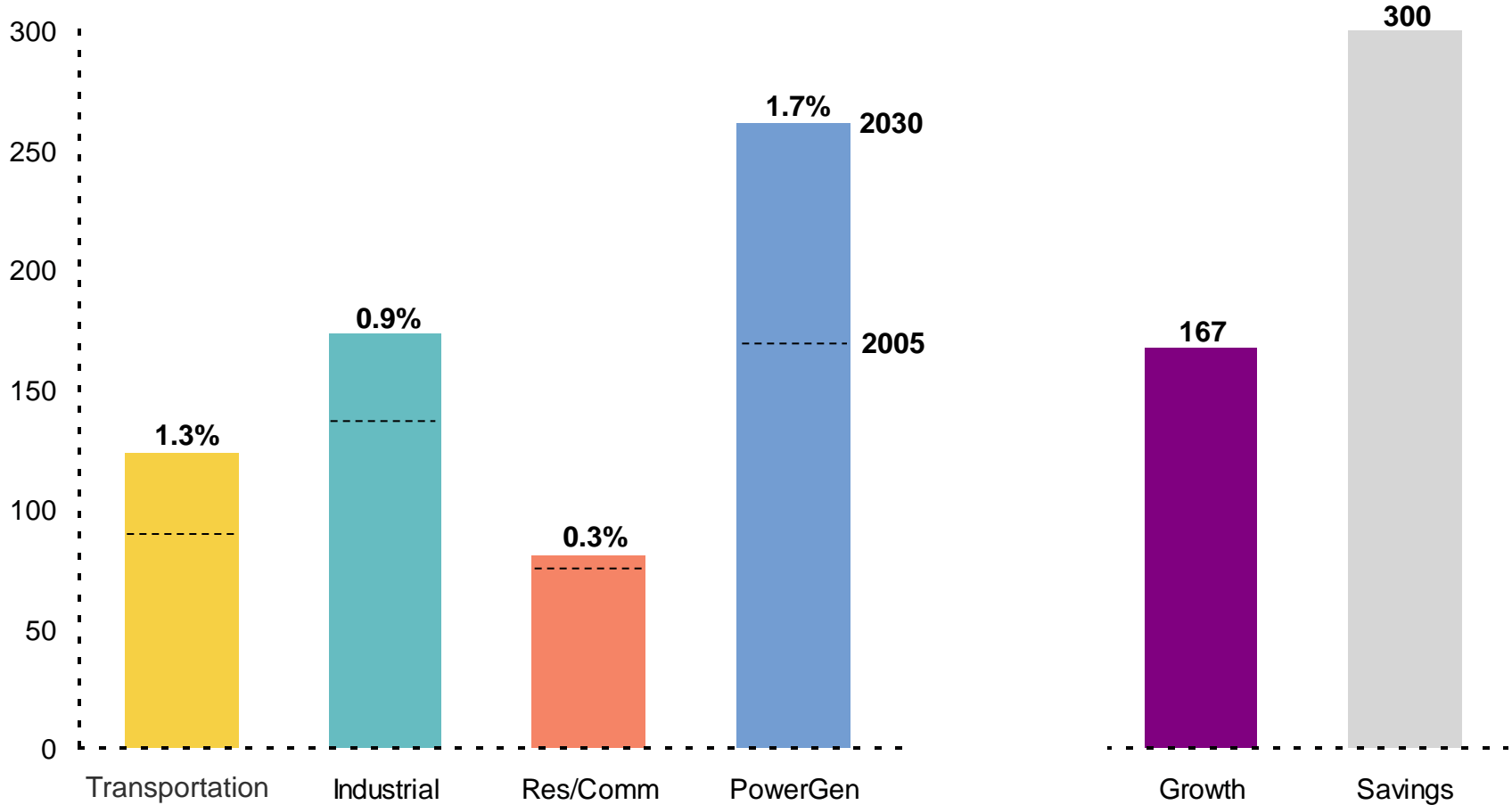
Quadrillion BTUs



# Power Generation Leads Growth

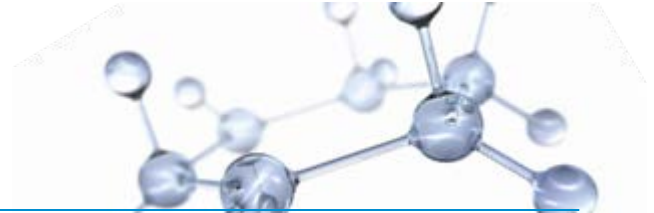


Quadrillion BTUs



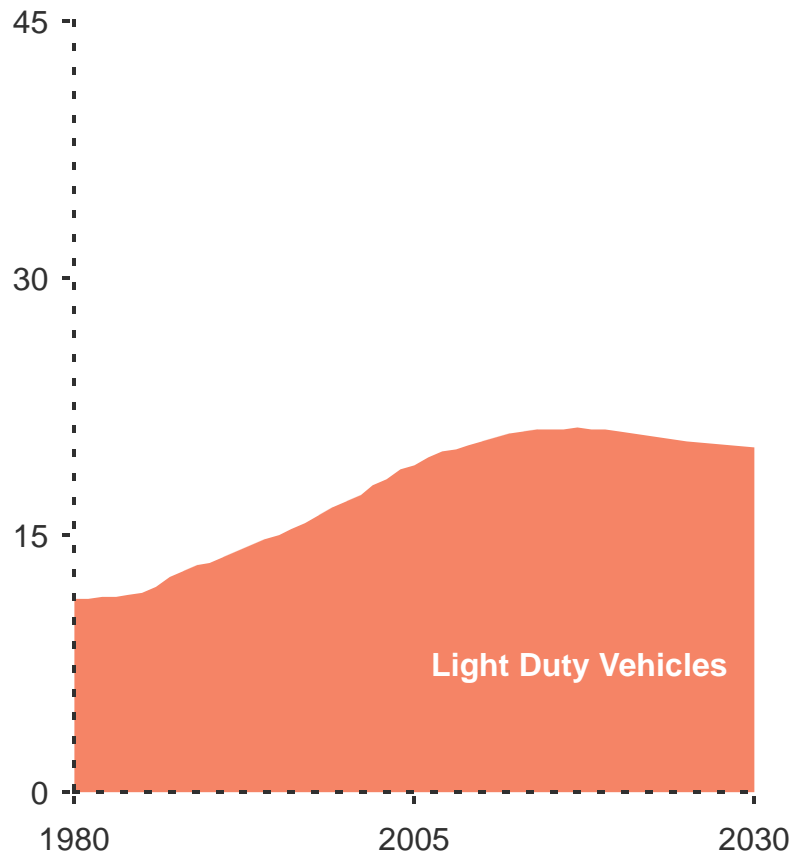


# Commercial Drives Demand Growth



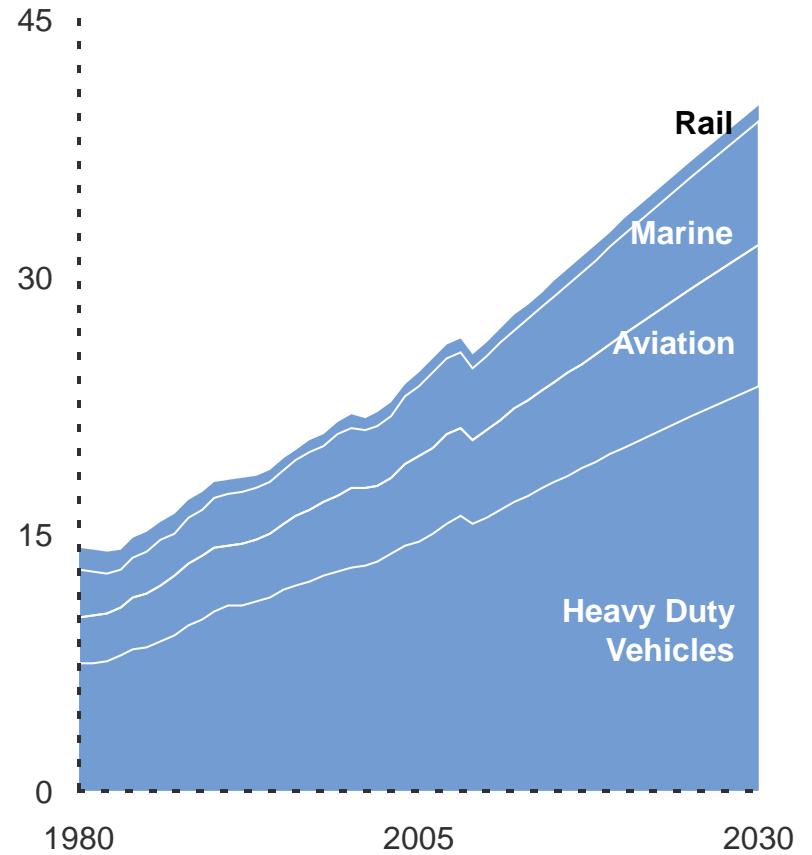
## Personal

MBDOE

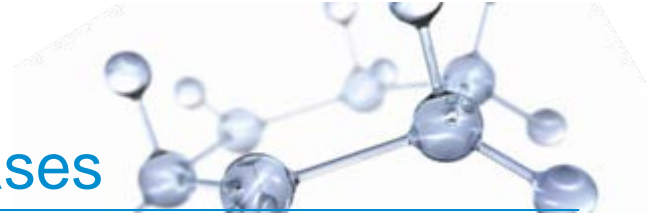


## Commercial

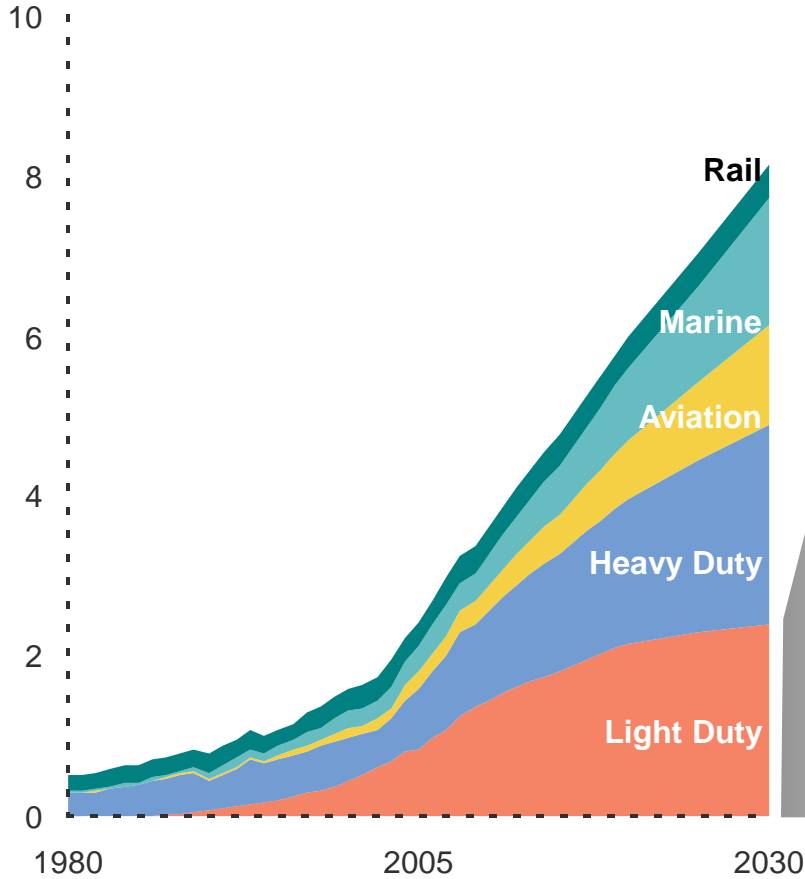
MBDOE



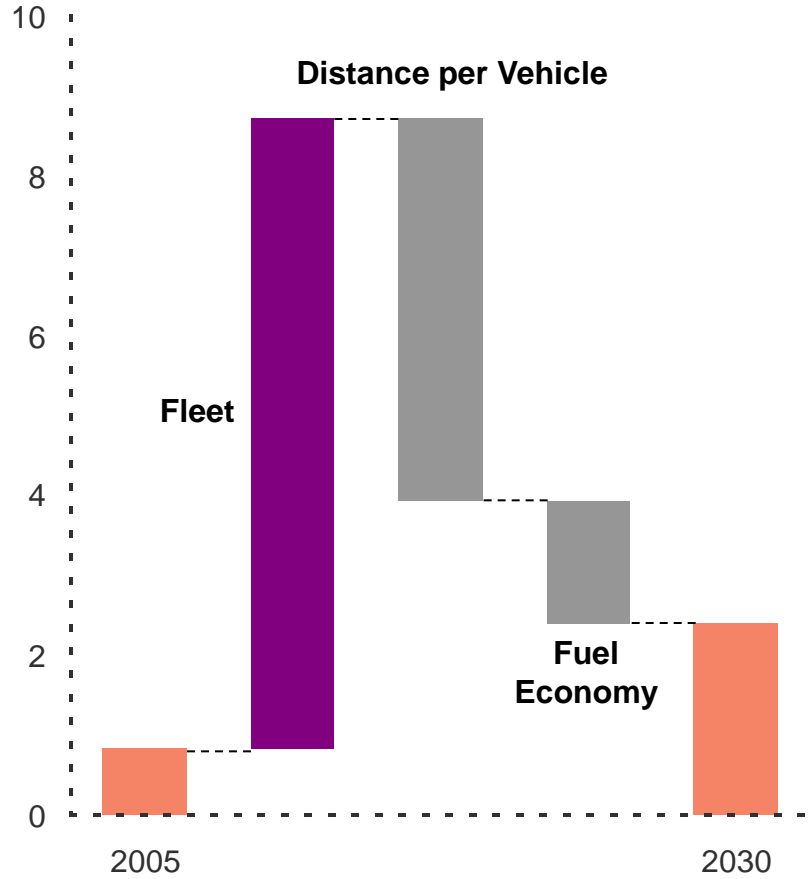
# China Personal Transportation Increases



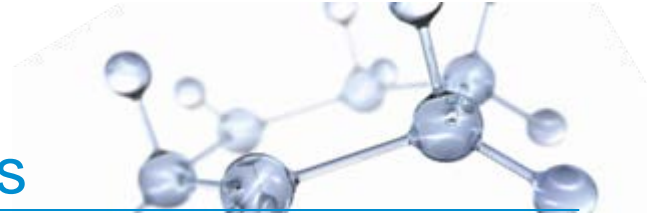
**Demand**  
MBDOE



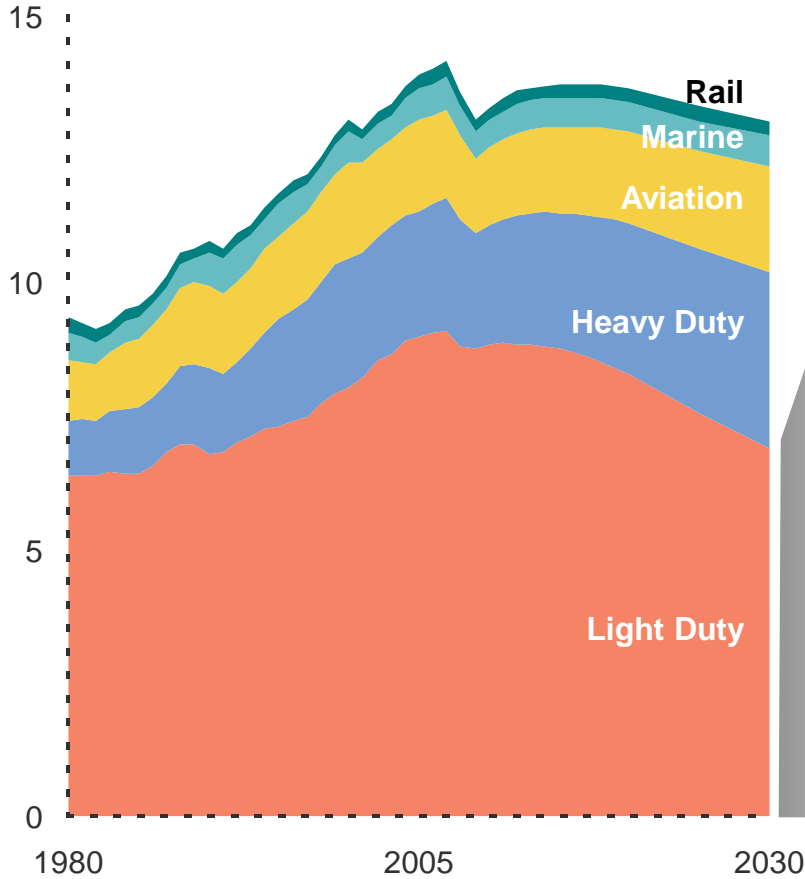
**Demand Changes**  
MBDOE



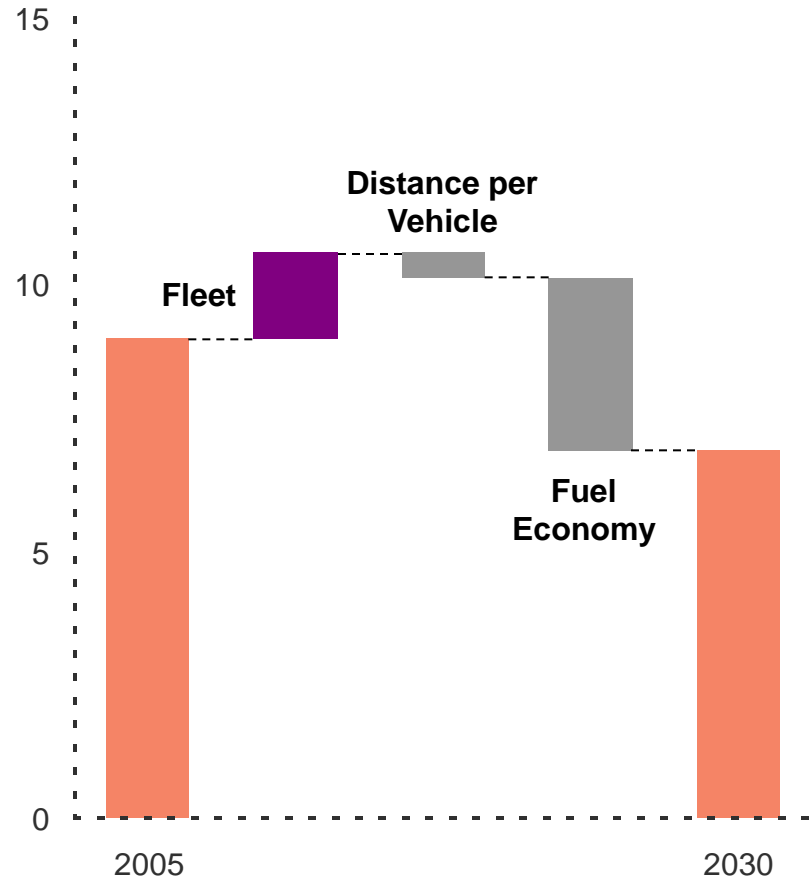
# U.S. Personal Transportation Declines



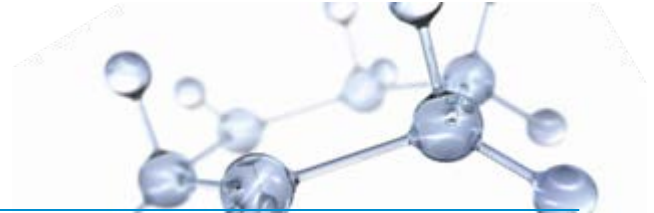
**Demand**  
MBDOE



**Demand Changes**  
MBDOE

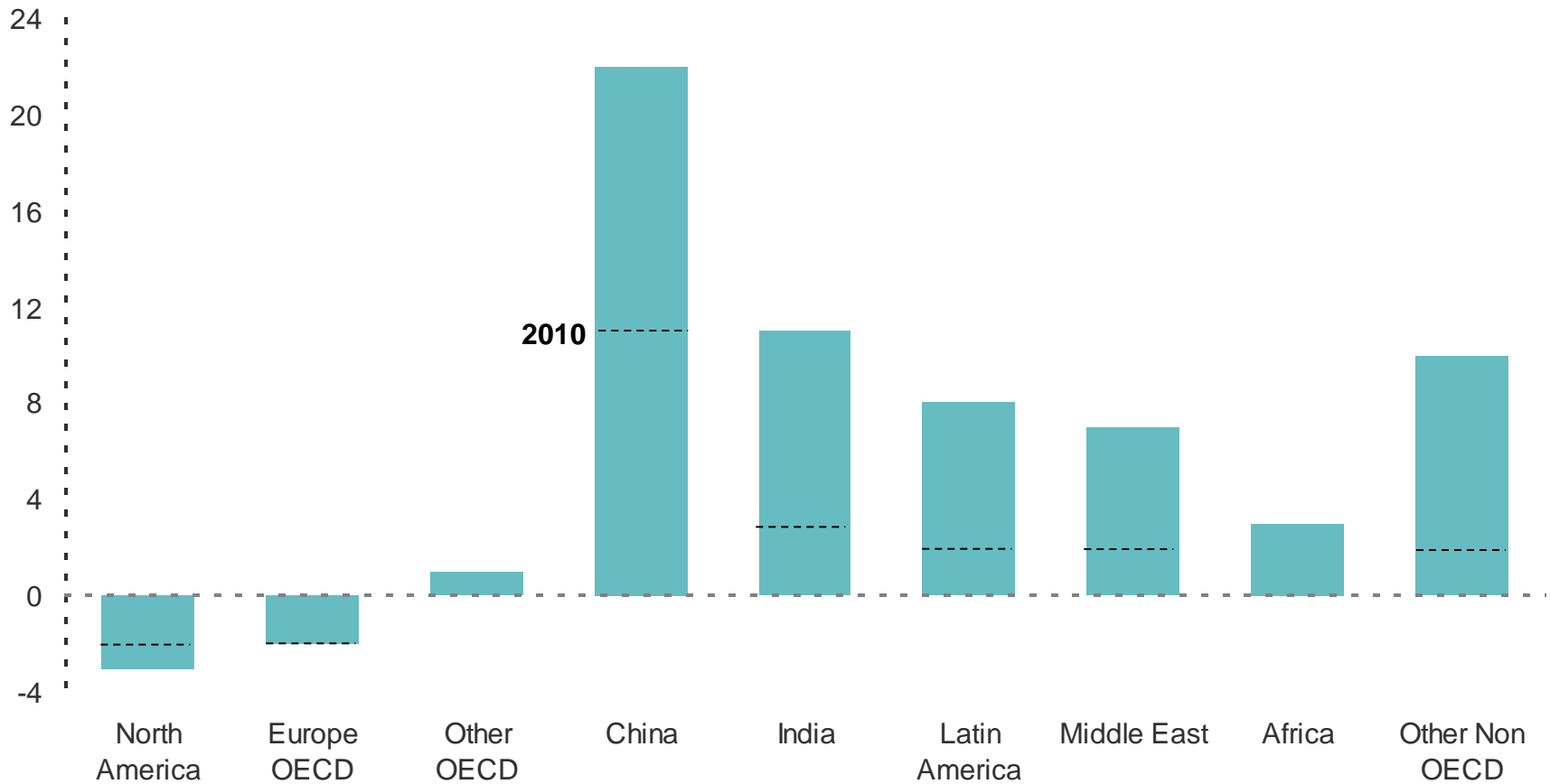


# Industrial Demand Shifts Globally



## By Region Growth 2005 to 2030

Quadrillion BTUs

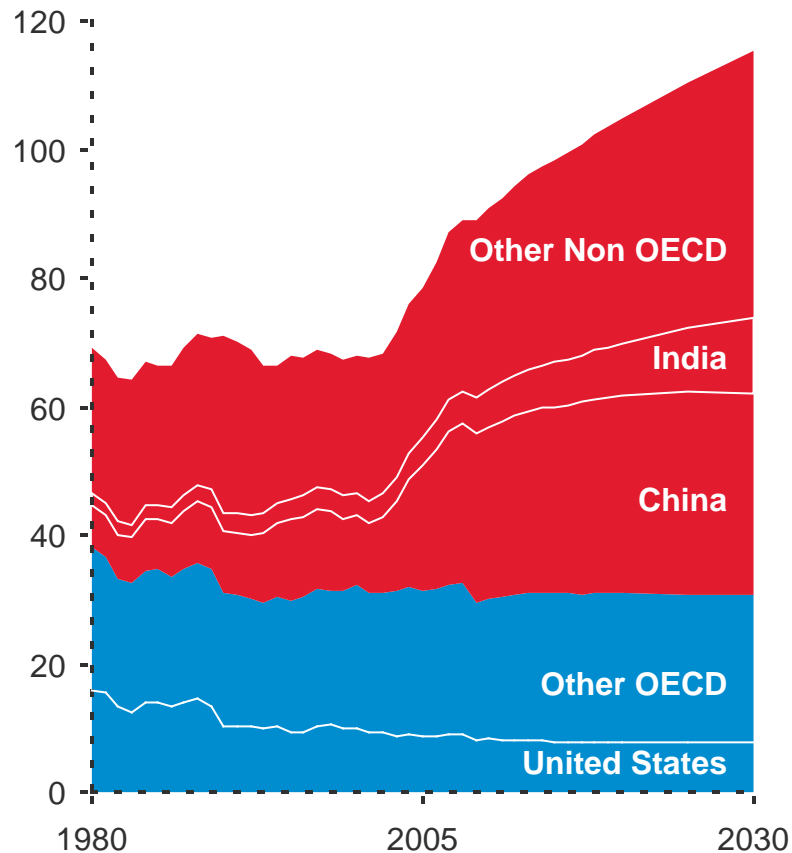


# Industrial Demand Shift Continues



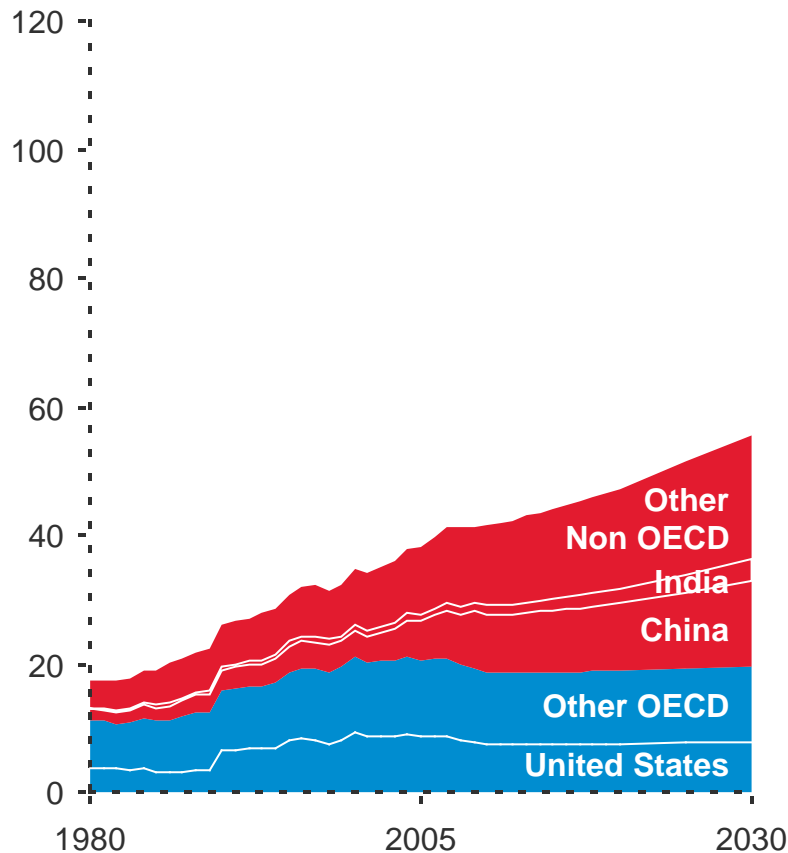
## Heavy Industry

Quadrillion BTUs

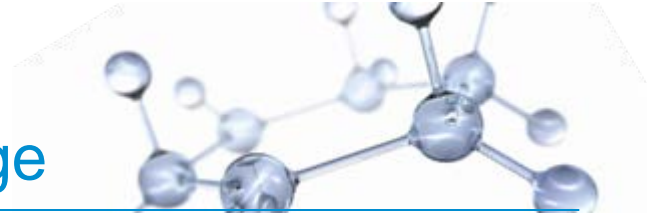


## Chemicals

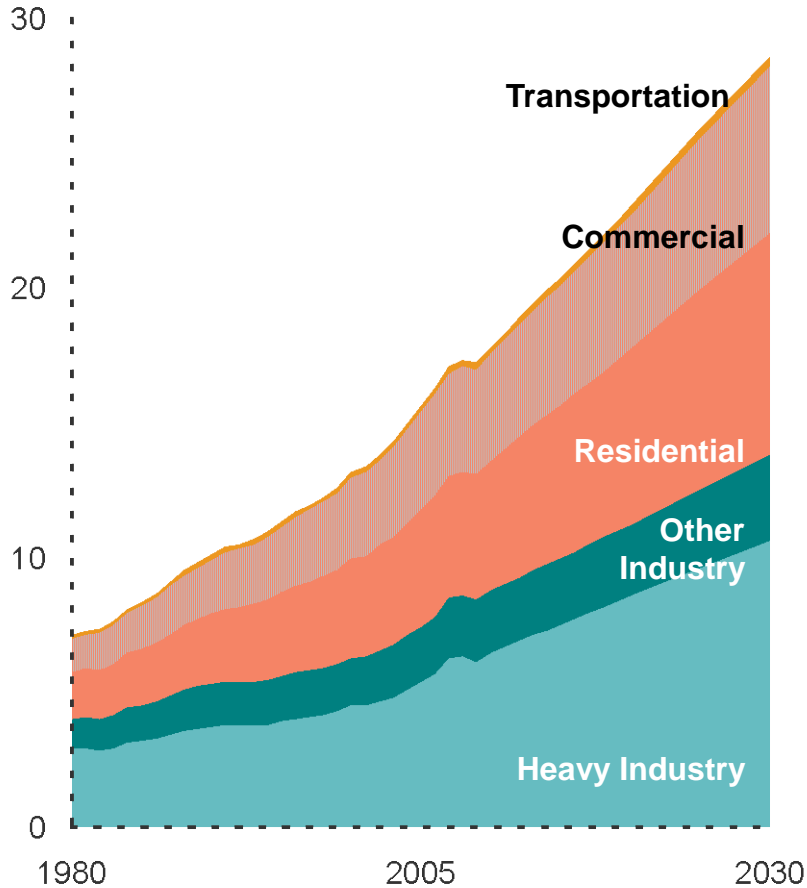
Quadrillion BTUs



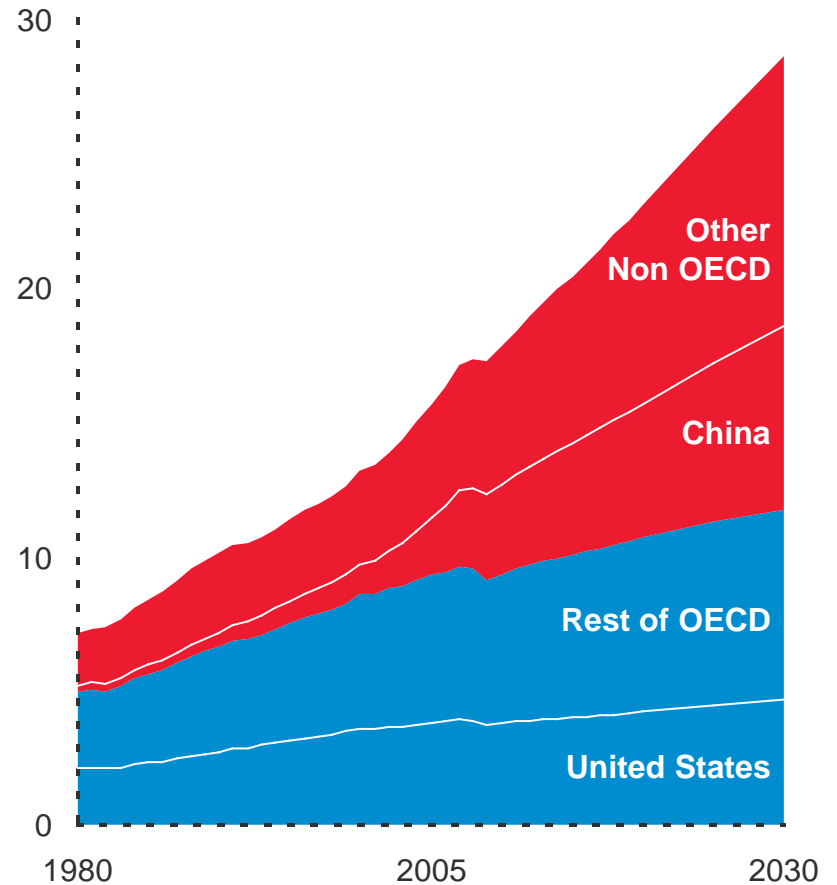
# Electricity Demand Continues to Surge



**By Sector**  
k TWh



**By Region**  
k TWh



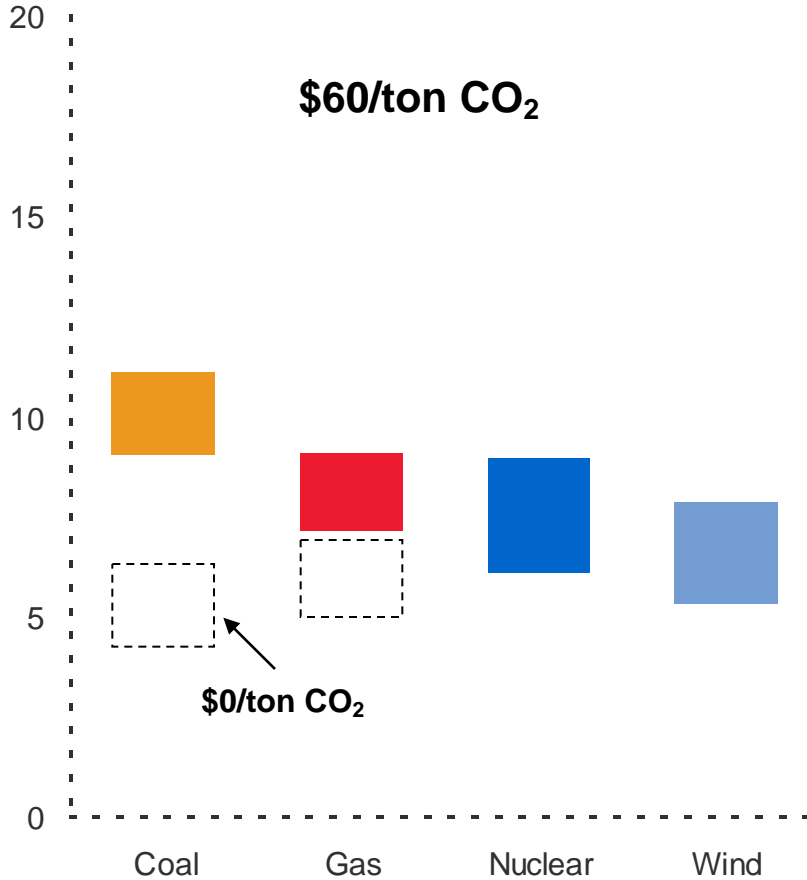
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# Power Generation Mix Evolves



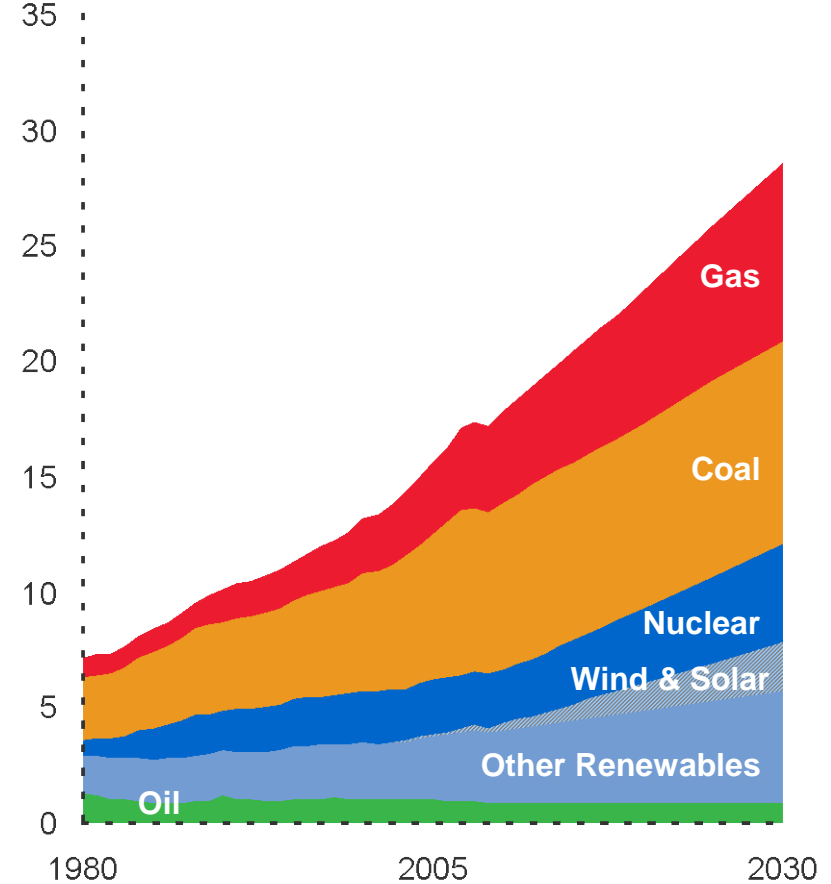
## Baseload, Startup 2025

2010 cents/kWh



## By Generation

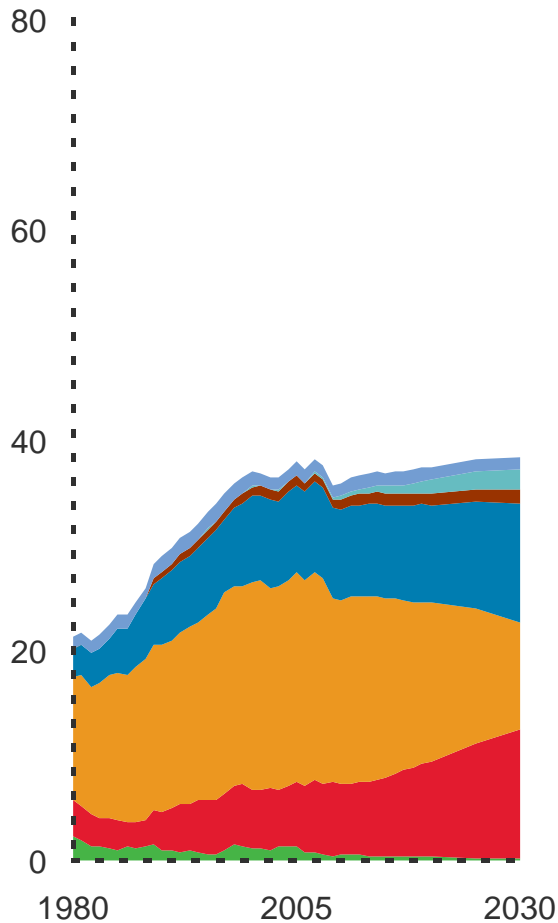
k TWh



# Regional Needs Drive Fuels for Power

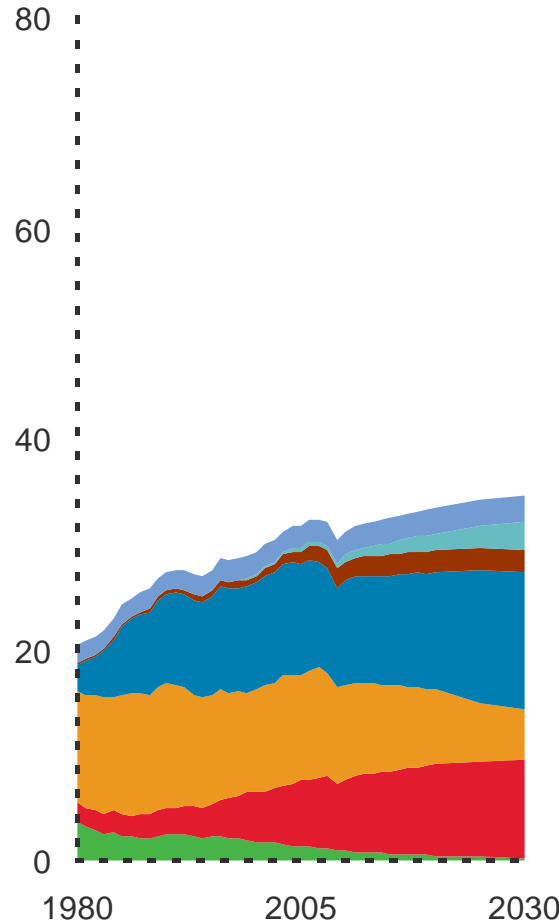


**United States**  
Quadrillion BTUs

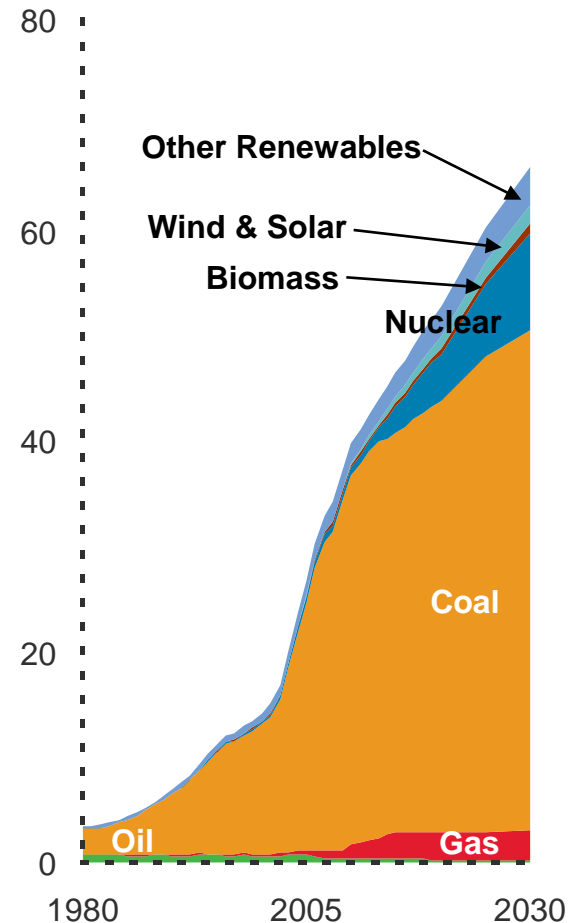


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**Europe**  
Quadrillion BTUs



**China**  
Quadrillion BTUs

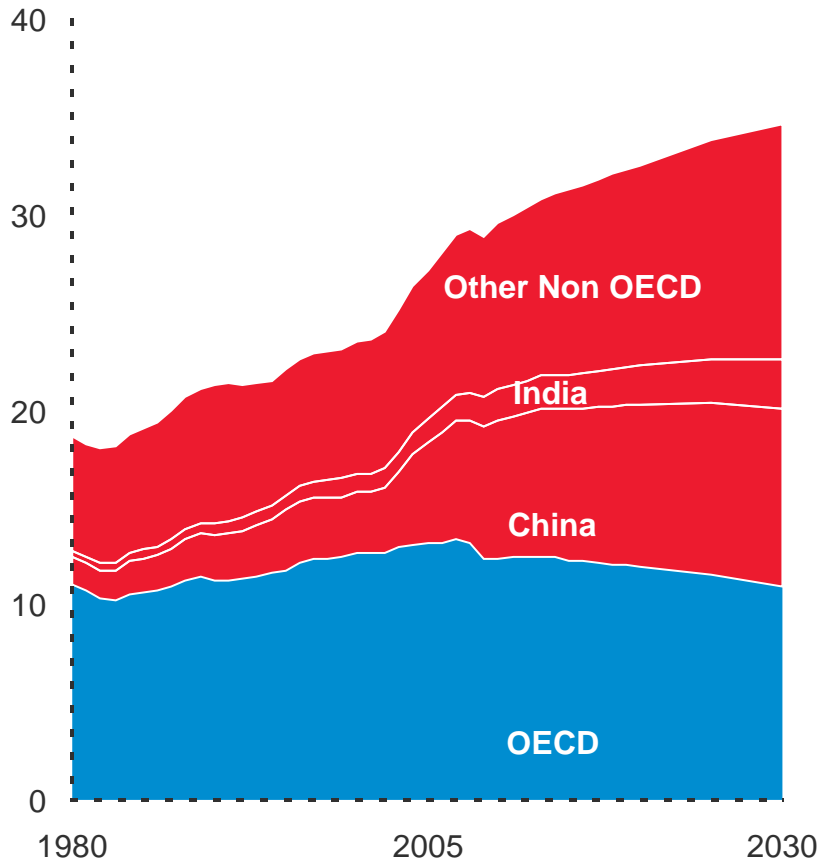




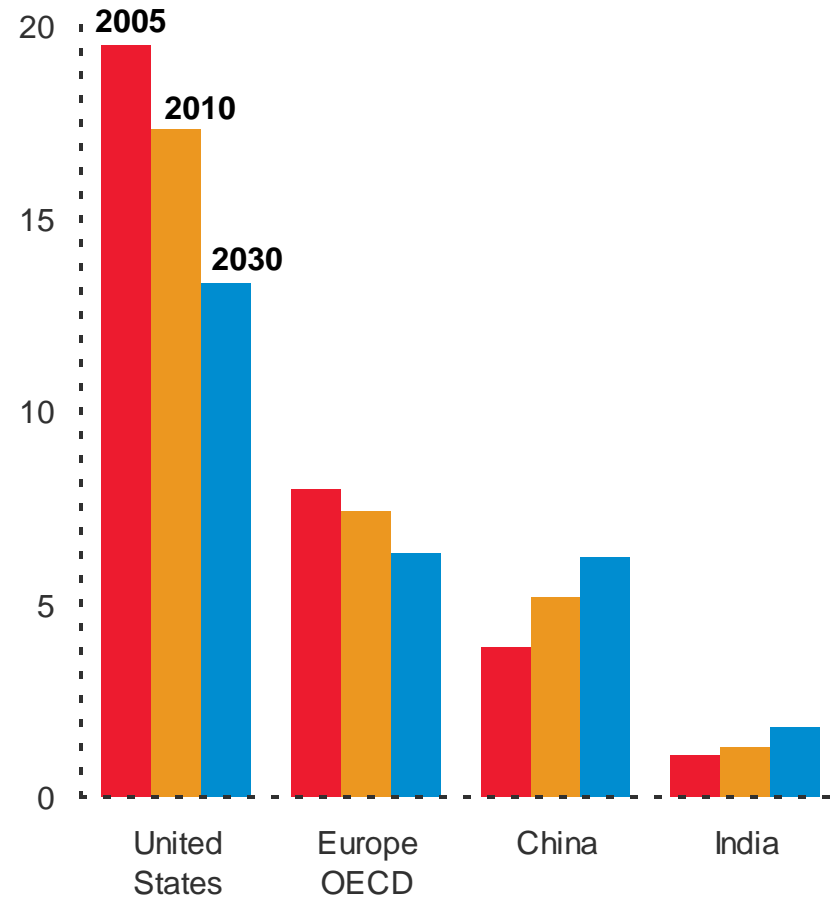
# Regional CO<sub>2</sub> Emissions Trends Vary



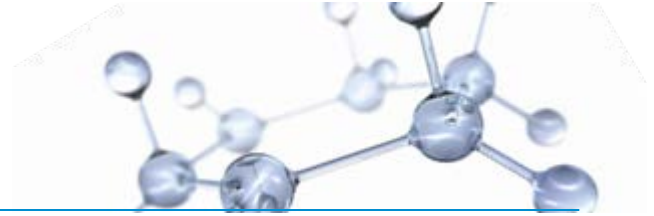
**By Region**  
Billion Tons



**Emissions per Capita**  
Tons per Person

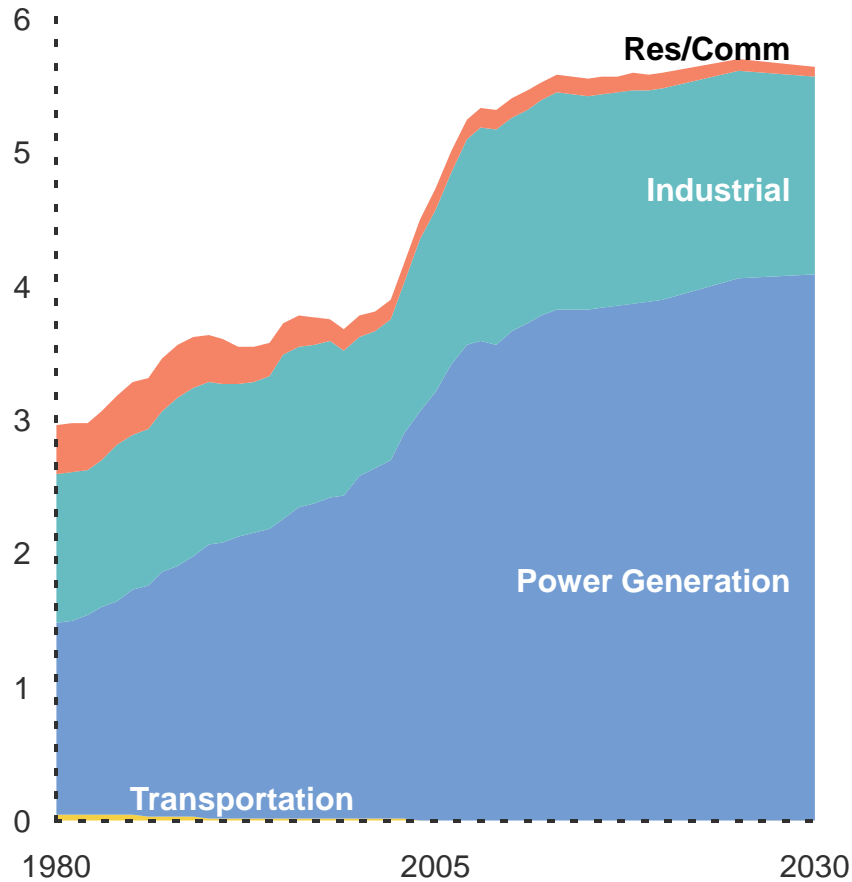


# Global Coal Growth Slows



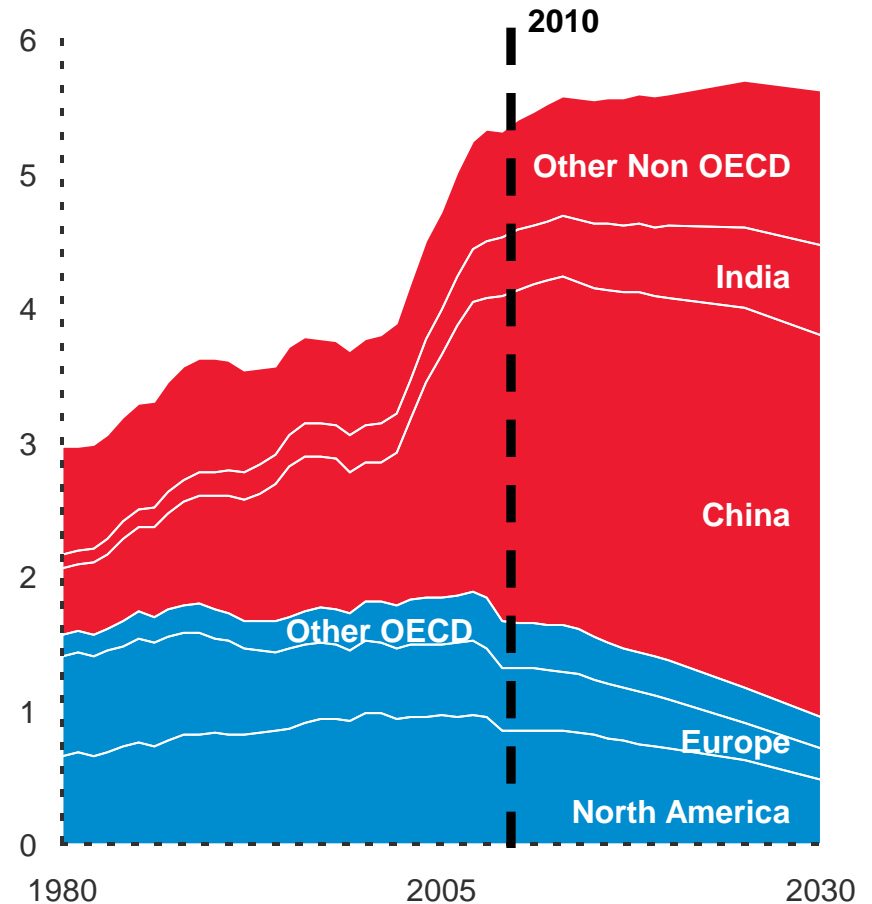
## Demand by Sector

Billion Tons



## Demand by Region

Billion Tons

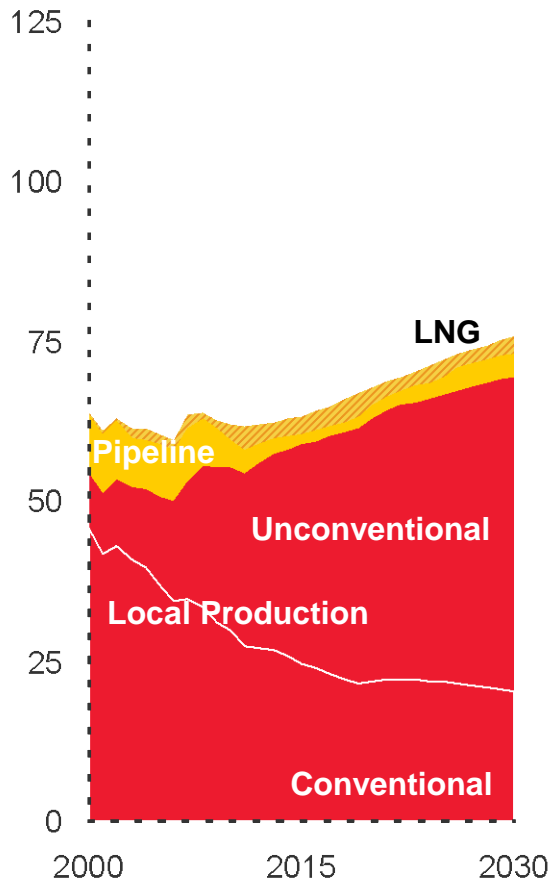


# Gas Supply Grows and Diversifies



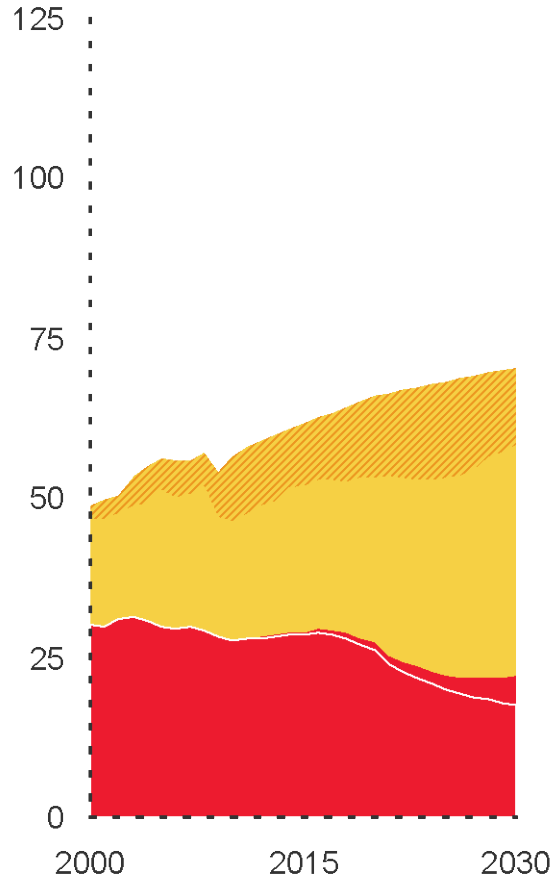
## United States

BCFD



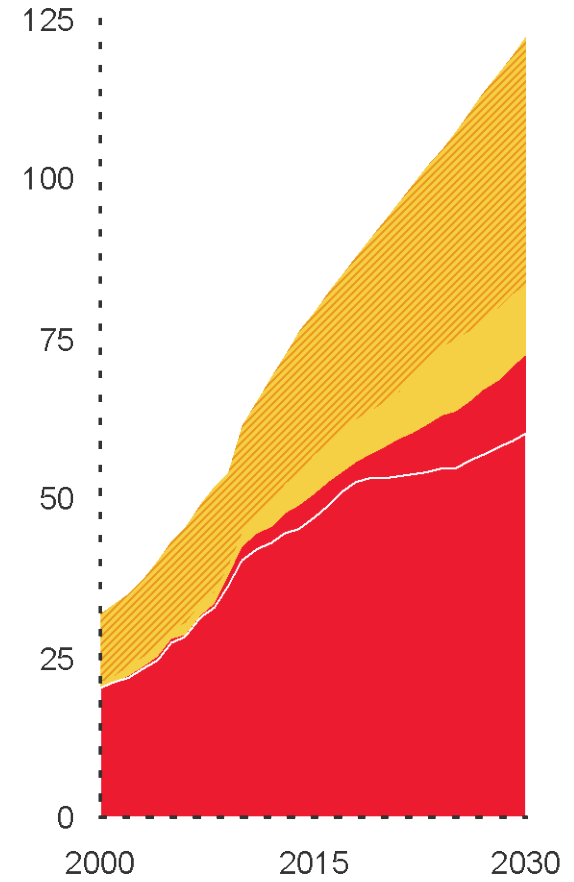
## Europe

BCFD



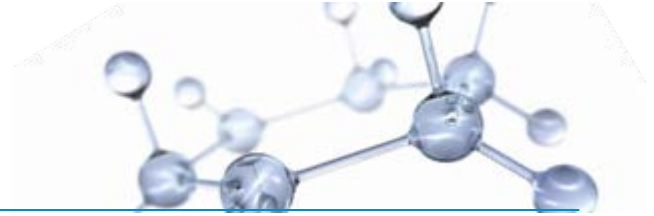
## Asia Pacific

BCFD



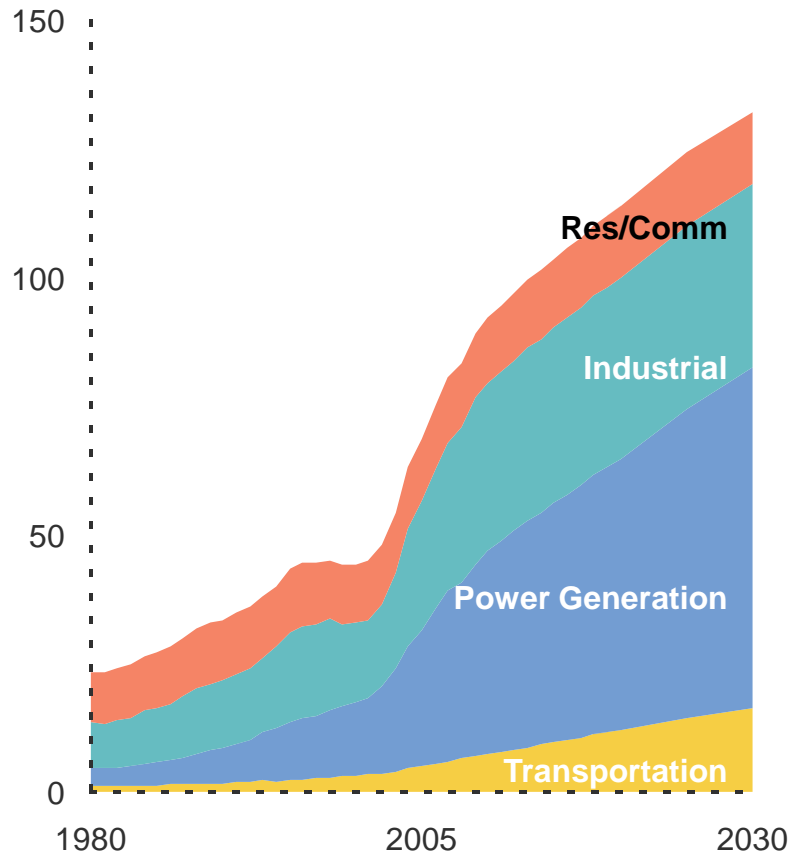
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# China Energy Demand & Supply



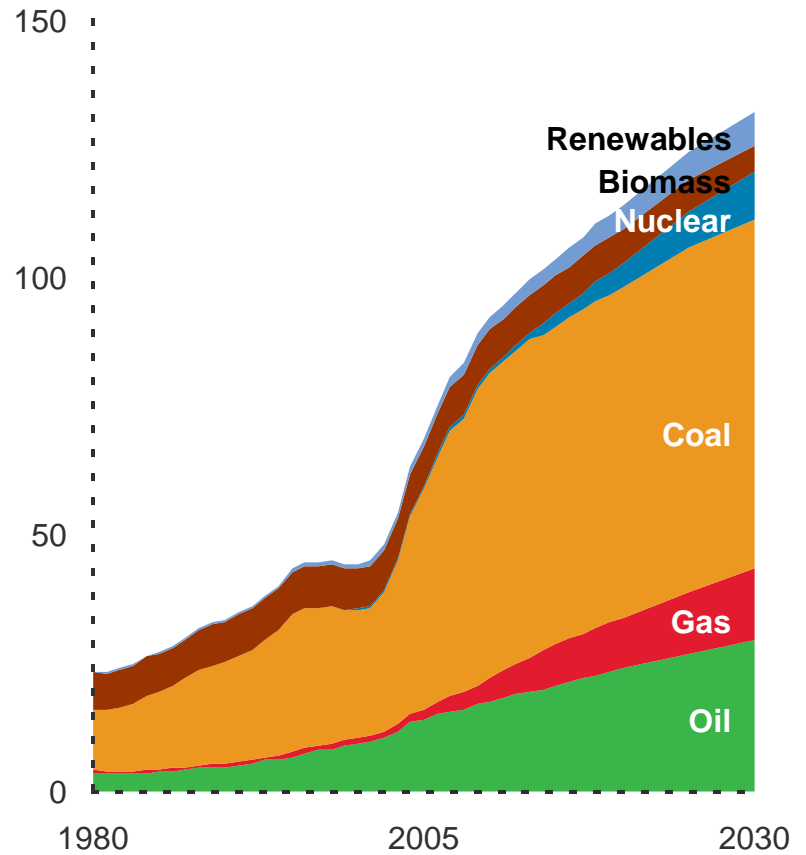
## By Sector

Quadrillion BTUs

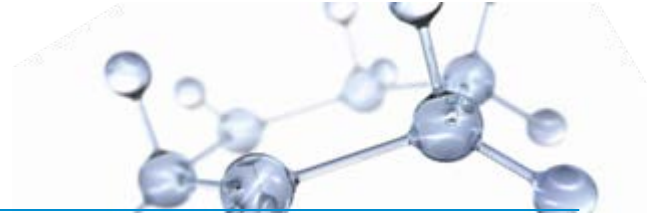


## By Fuel

Quadrillion BTUs

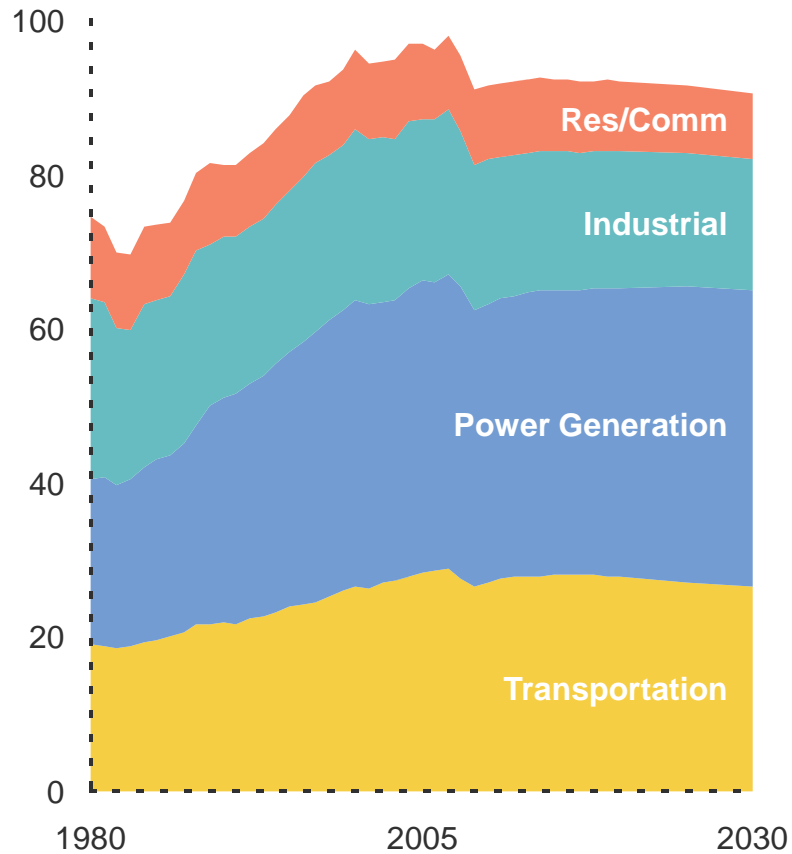


# US Energy Demand and Supply



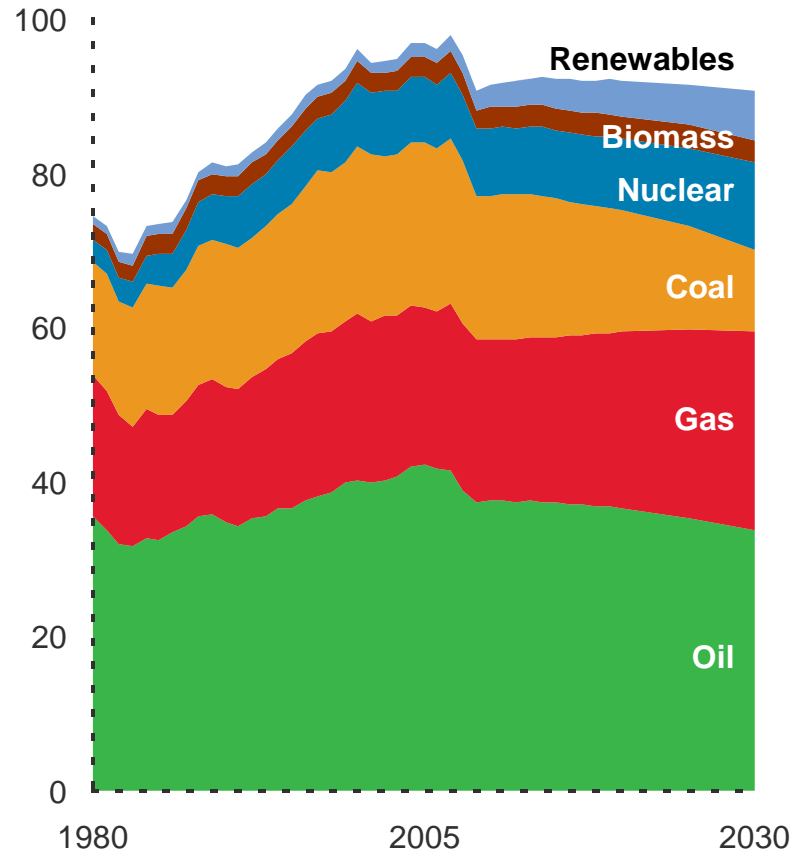
## By Sector

Quadrillion BTUs



## By Fuel

Quadrillion BTUs





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