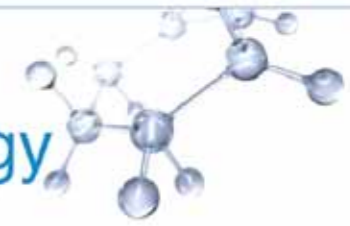


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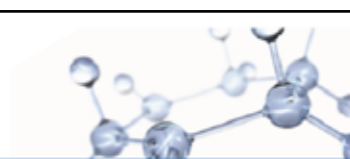


# The Outlook for Energy

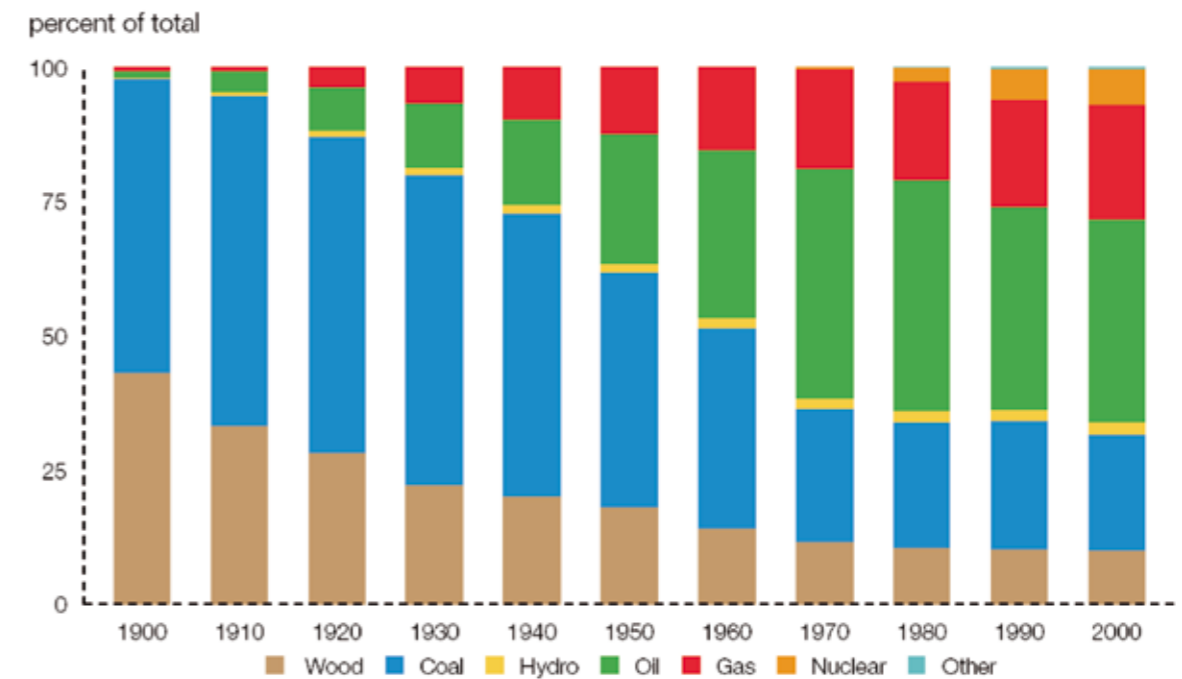
## a view to 2030

Gernot Kalkoffen  
EMBT Conference  
March 24<sup>th</sup>, 2010 Hanover

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 as 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.



## 100 Years of Energy Sources



### Importance of Energy



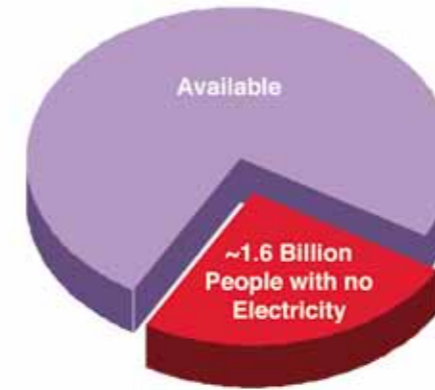
3

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### Challenge: Meeting Basic Needs

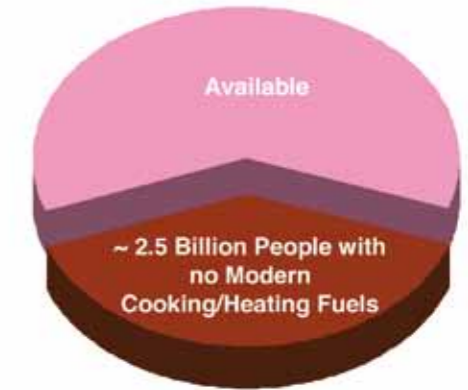


Electricity



2006 World Bank

Modern Cooking/Heating Fuels



5

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### Our Key Energy Challenges



- Reducing poverty and improving living standards



4

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### Our Key Energy Challenges



- Reducing poverty and improving living standards
- Supporting economic growth



6

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## Our Key Energy Challenges

- Reducing poverty and improving living standards
- Supporting economic growth
- Minimizing impacts on the environment
- Maintaining energy security

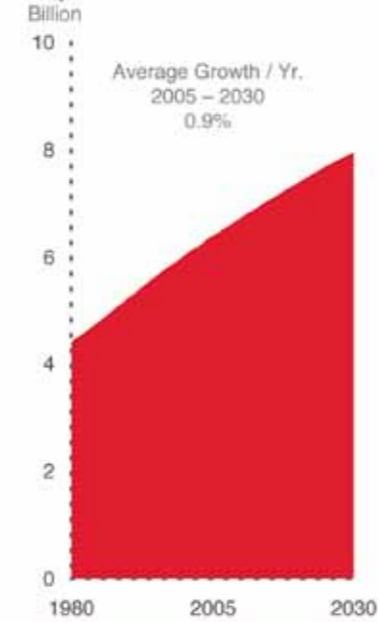


7

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## Global Economics and Energy

### Population



9

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## Our Key Energy Challenges

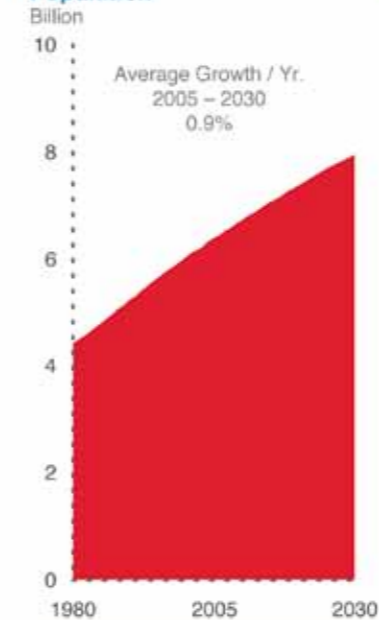
- Reducing poverty and improving living standards
  - Supporting economic growth
  - Minimizing impacts on the environment
  - Maintaining energy security
- Development of reliable and affordable energy – plus ongoing efficiency gains – are essential to meeting these challenges...

8

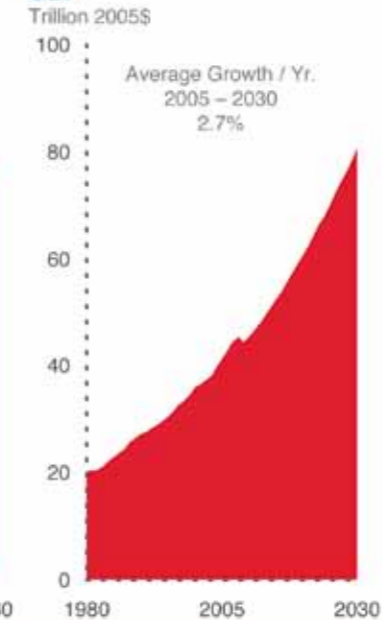
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## Global Economics and Energy

### Population



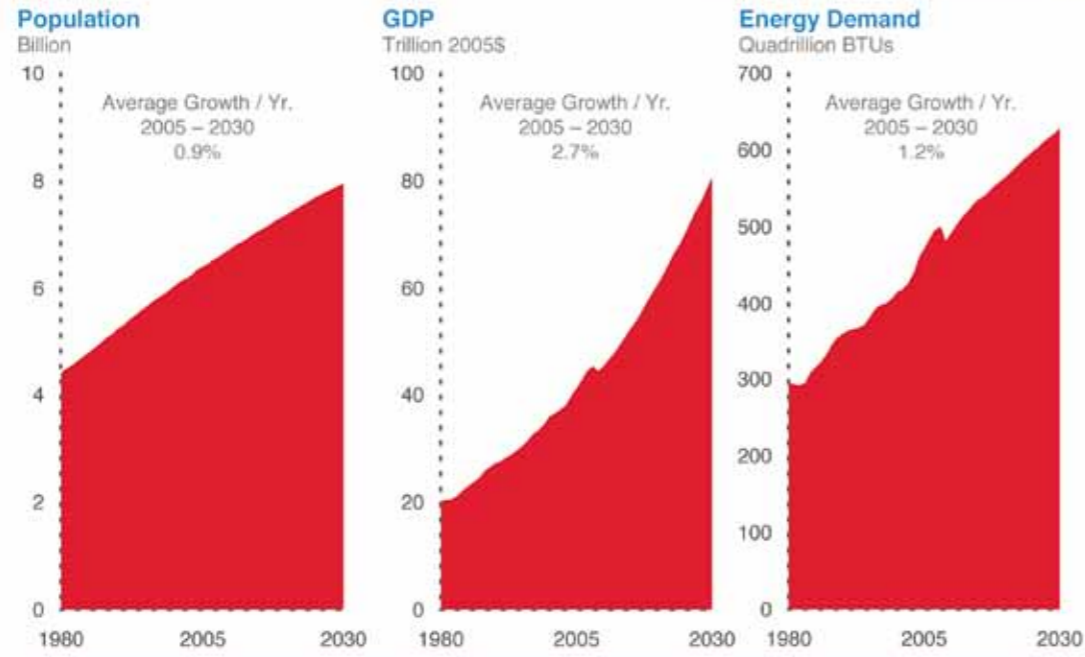
### GDP



10

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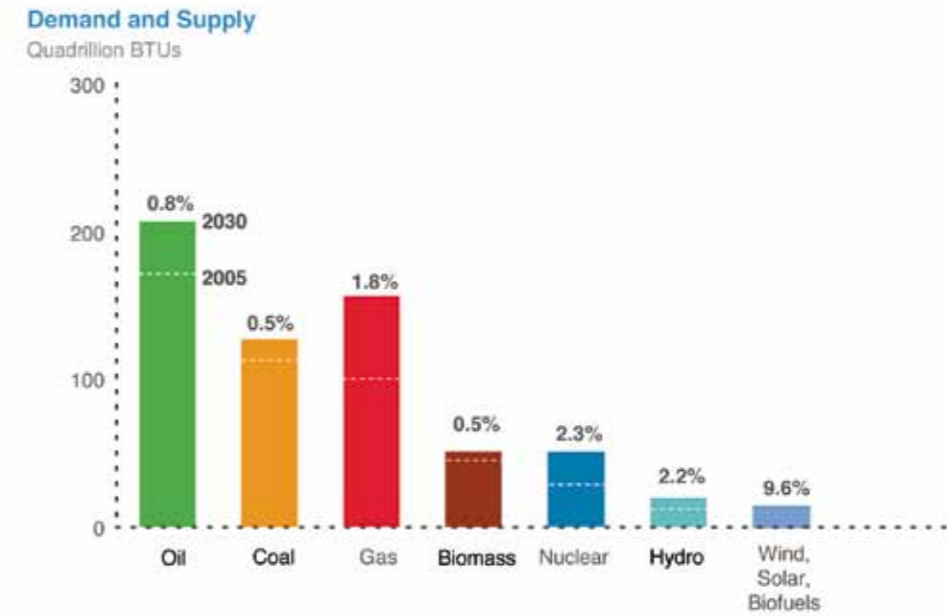
## Global Economics and Energy



11

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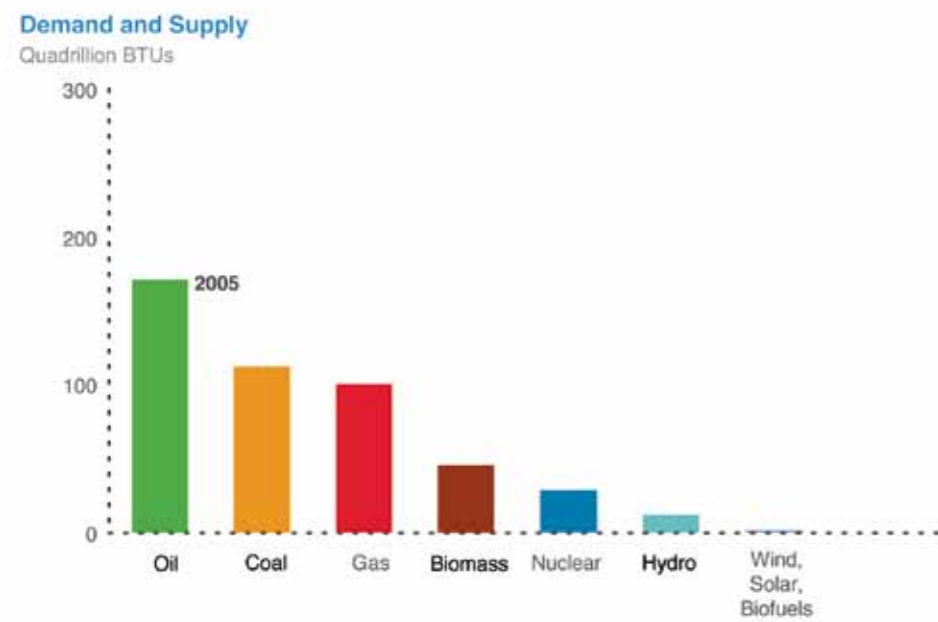
## Global Energy Demand and Supply



13

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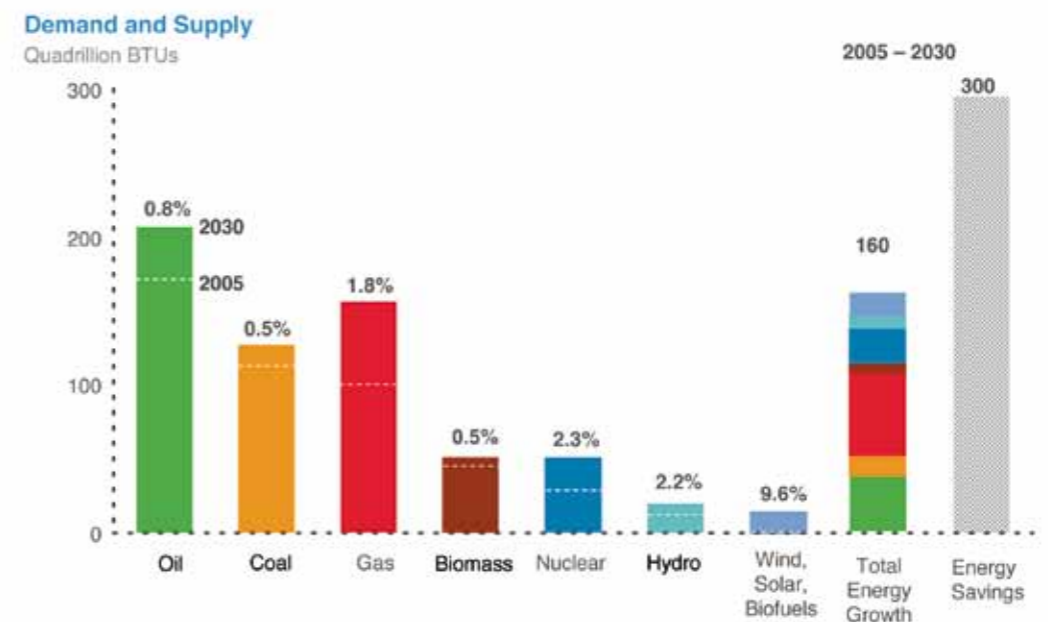
## Global Energy Demand and Supply



12

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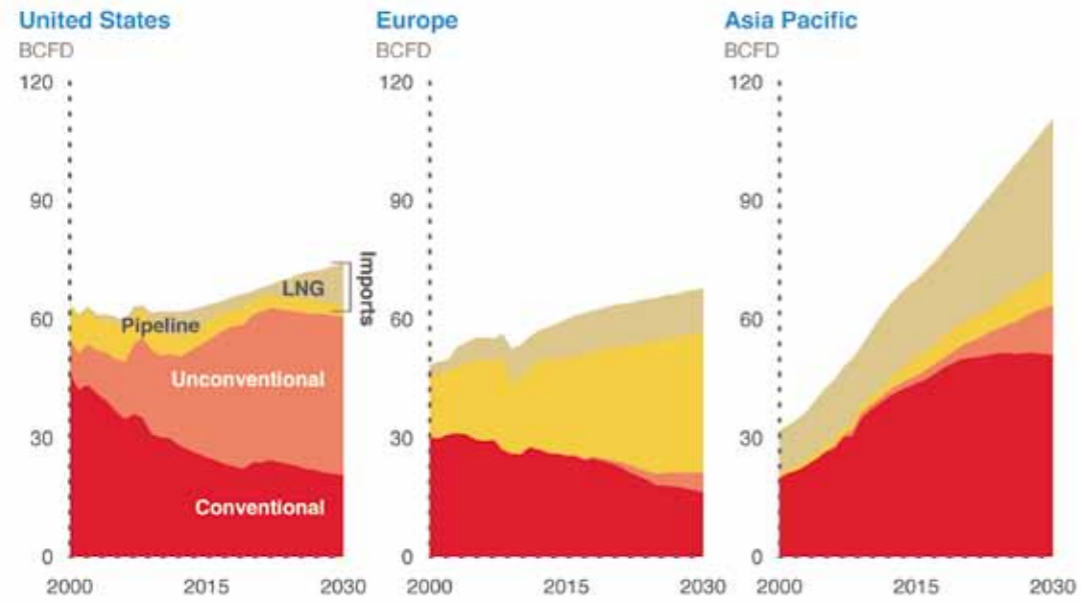
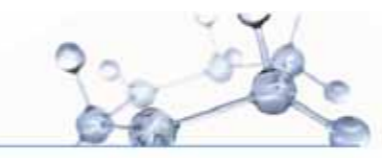
## Global Energy Demand and Supply



14

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## Gas Supply and Demand Balance

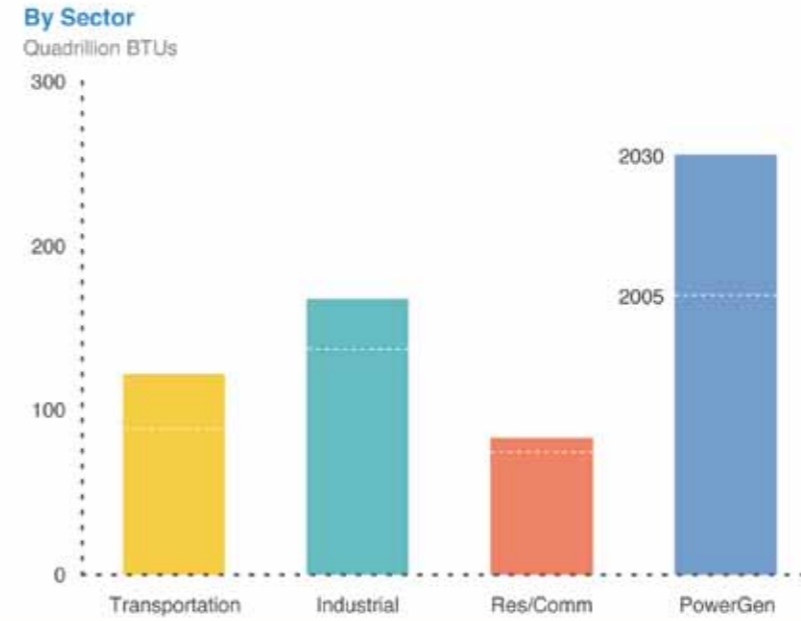
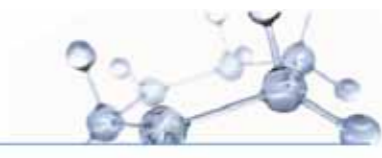


LNG: Liquefied Natural Gas

15

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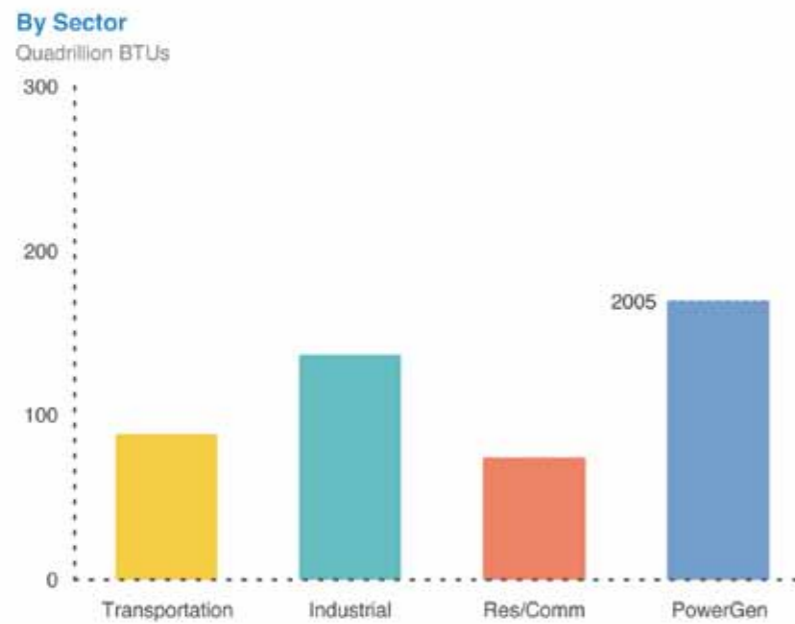
## Growing Global Demand



17

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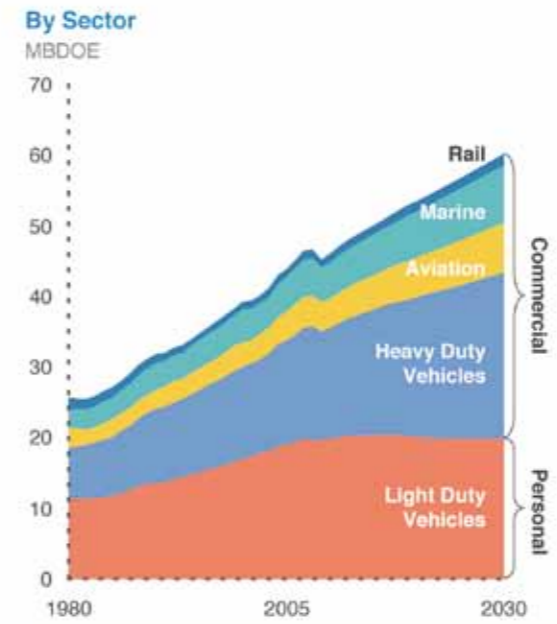
## Growing Global Demand



16

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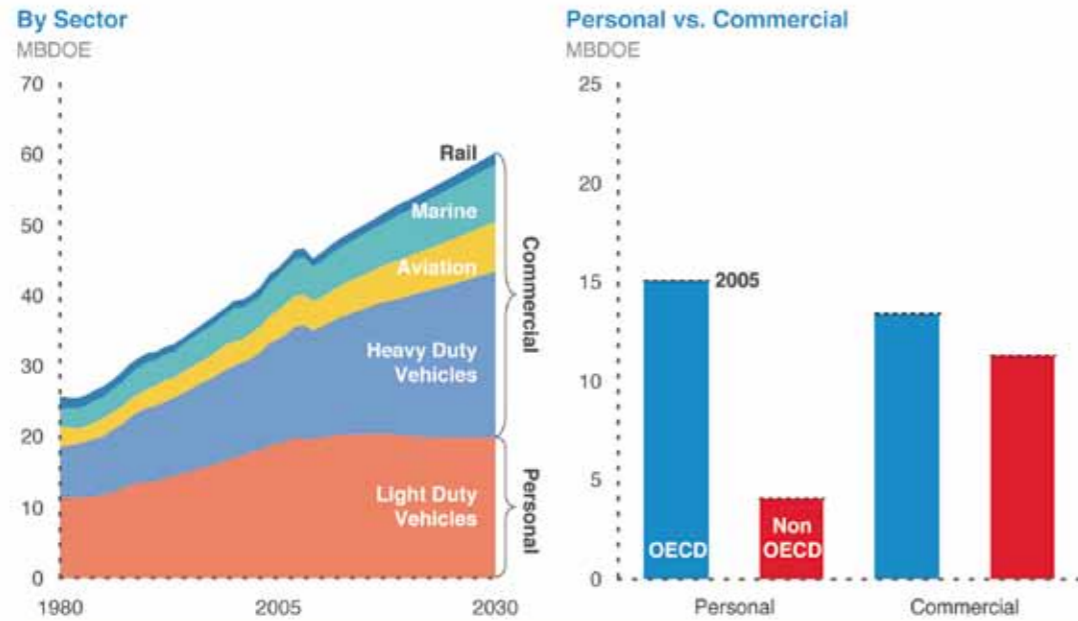
## Global Transportation Demand



18

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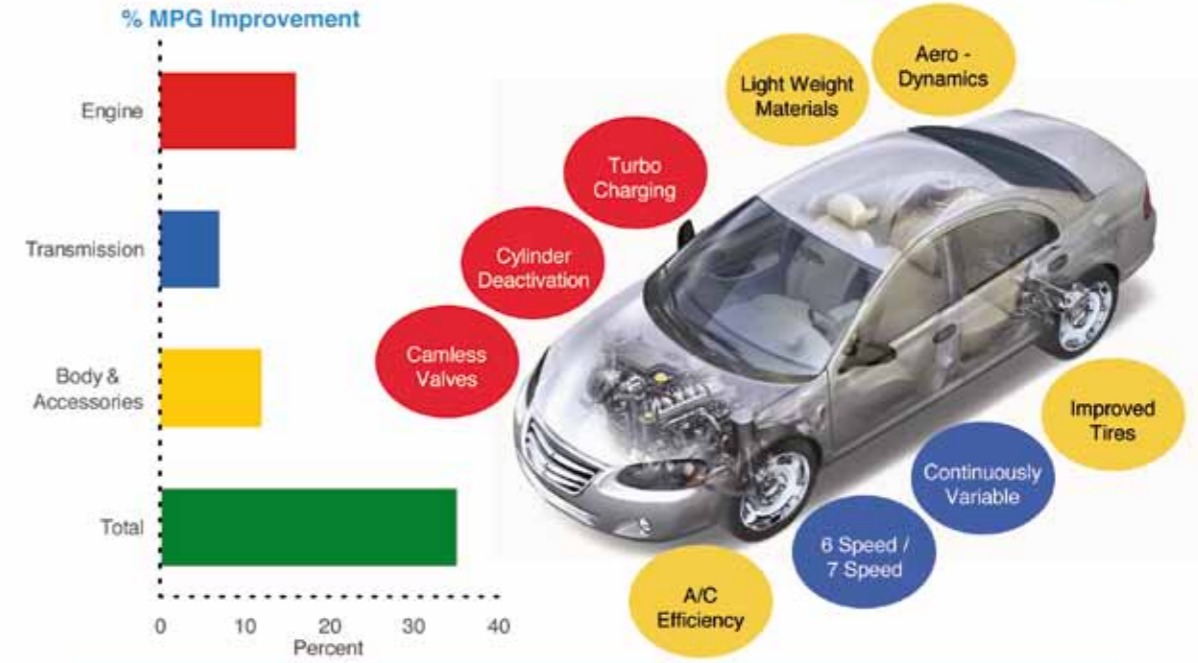
### Global Transportation Demand



19

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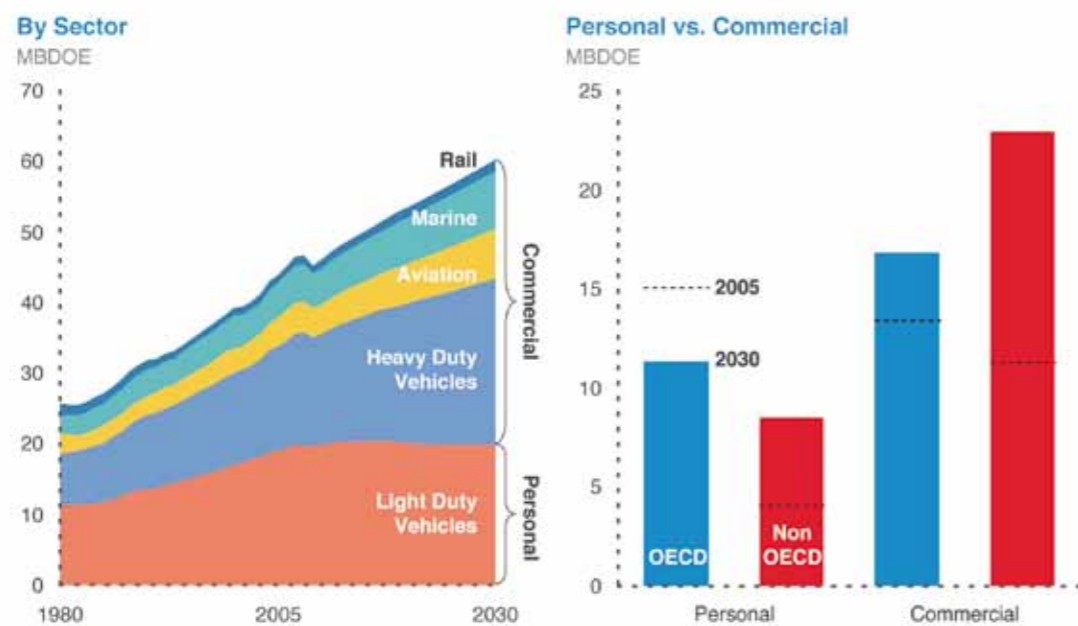
### Improving Today's Vehicle



21

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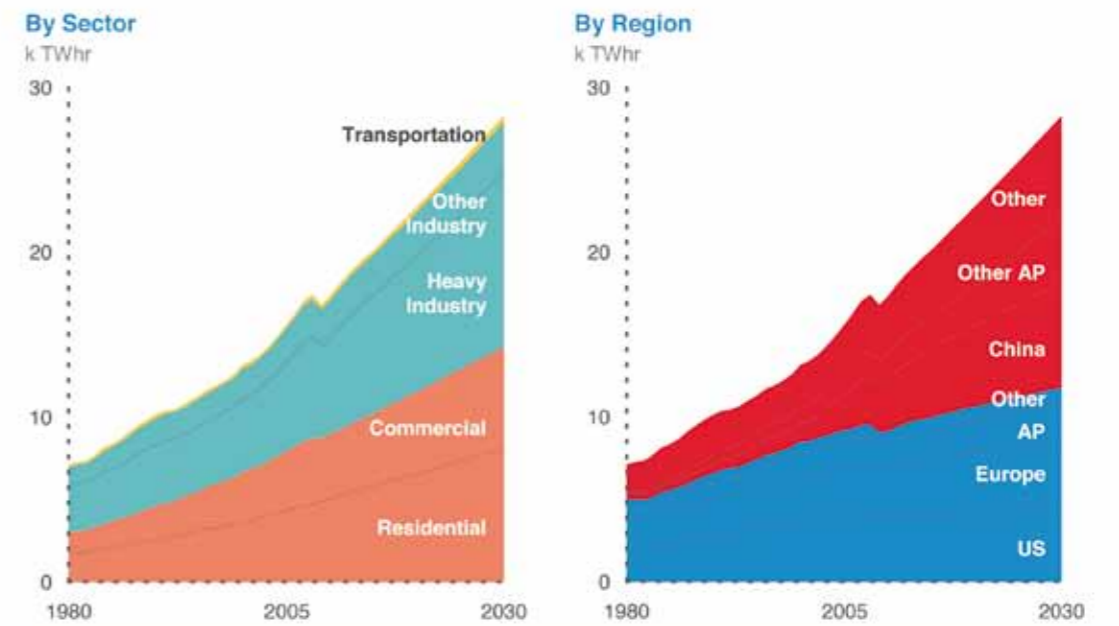
### Global Transportation Demand



20

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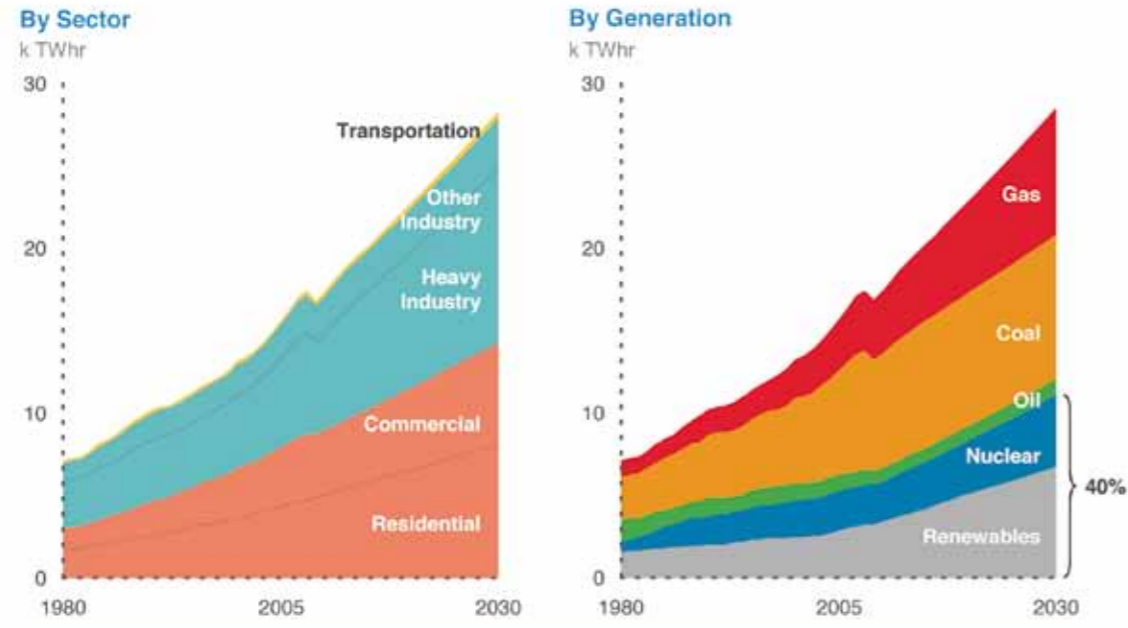
### Electricity Use is Growing Fast



22

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## Electricity Use is Growing Fast

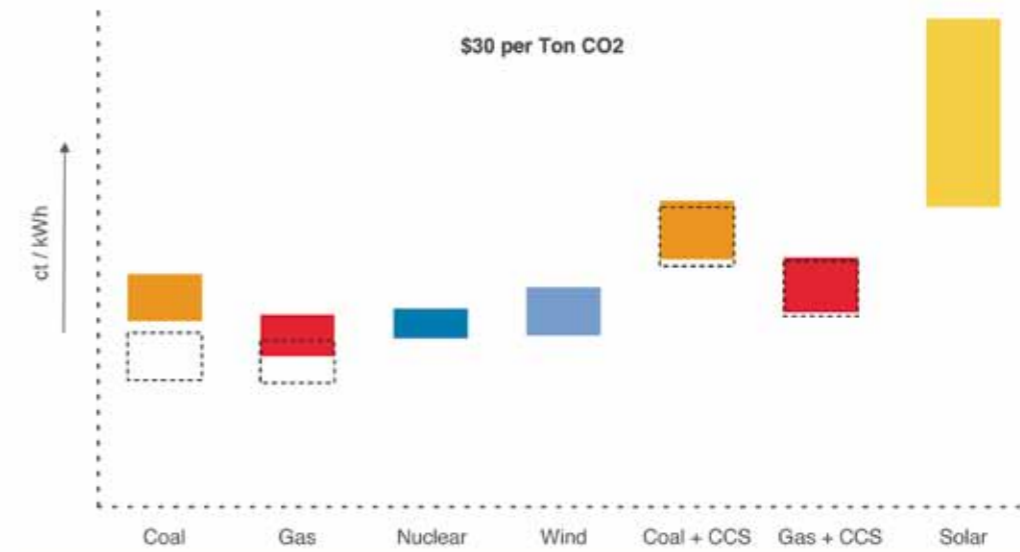


23

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## Electricity Generation Cost

Europe Baseload, Startup 2025

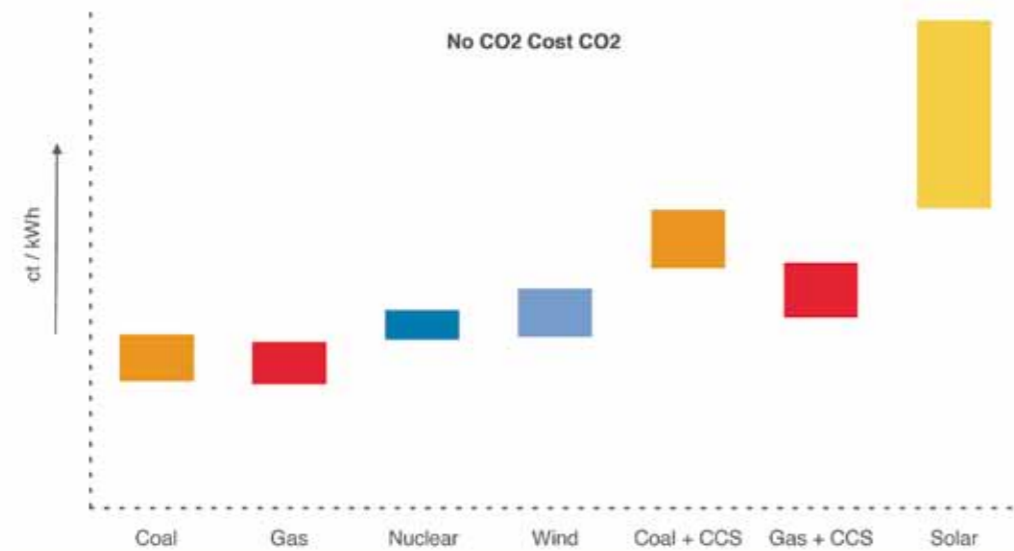


25

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## Electricity Generation Cost

Europe Baseload, Startup 2025

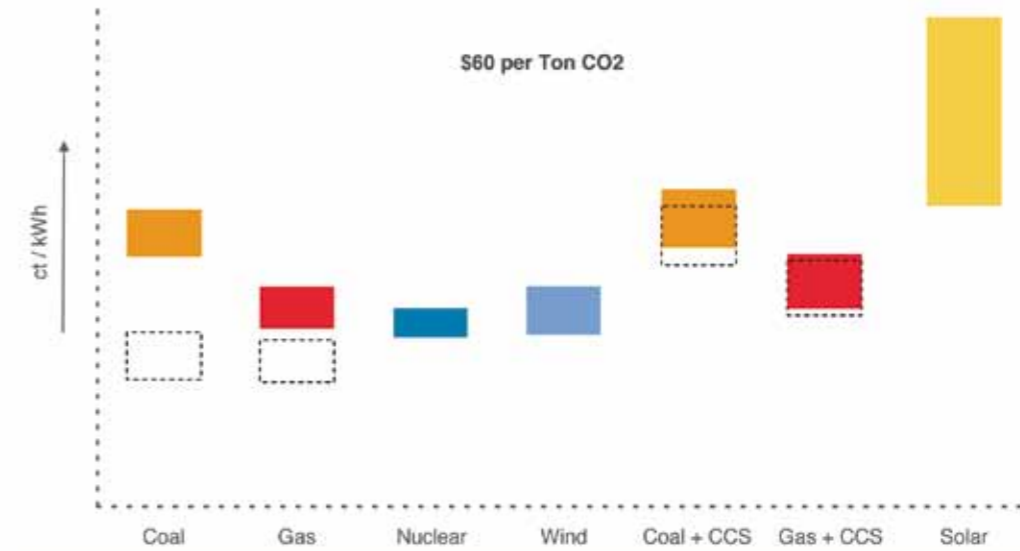


24

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## Electricity Generation Cost

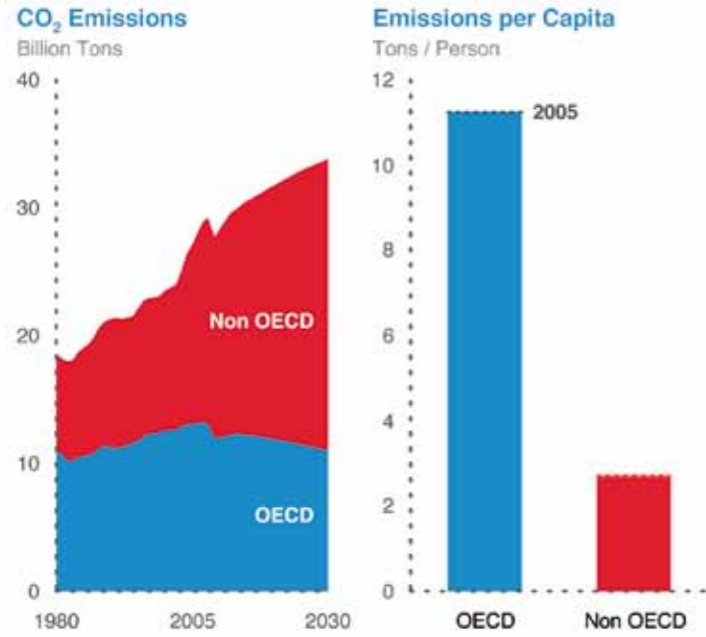
Europe Baseload, Startup 2025



26

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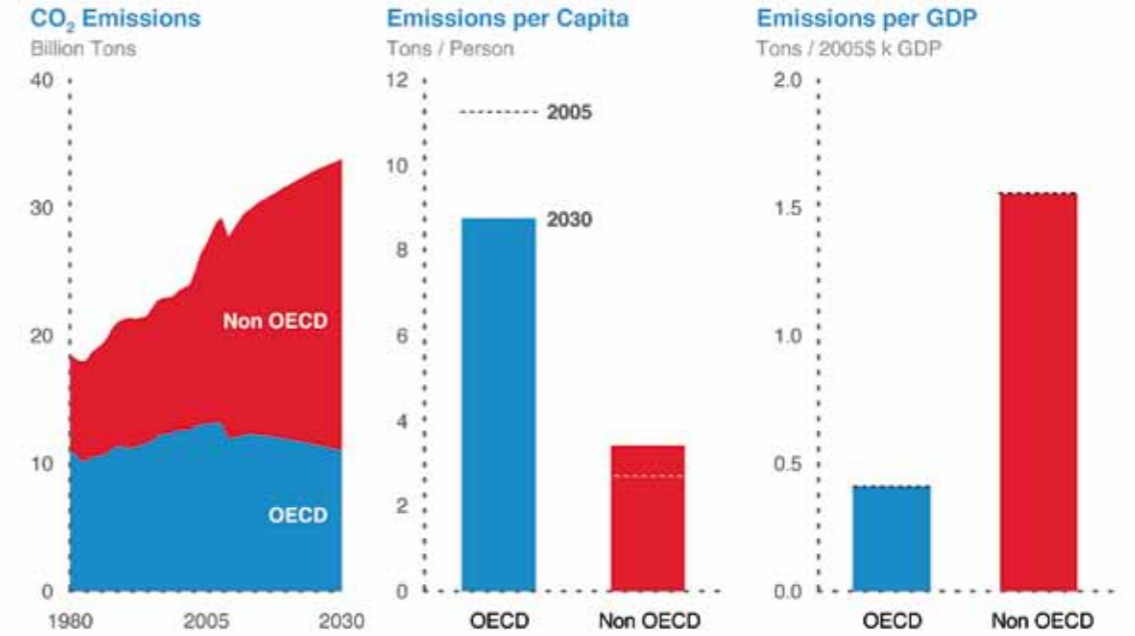
## CO<sub>2</sub> Emissions



27

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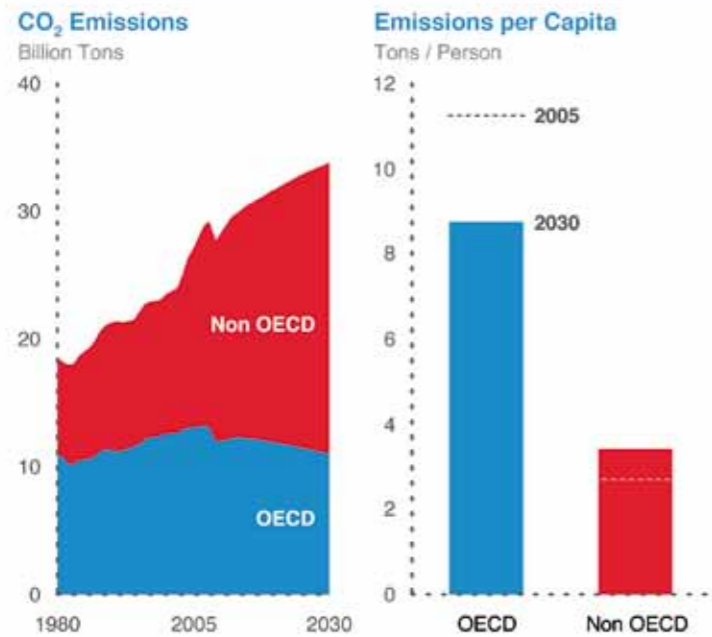
## CO<sub>2</sub> Emissions



29

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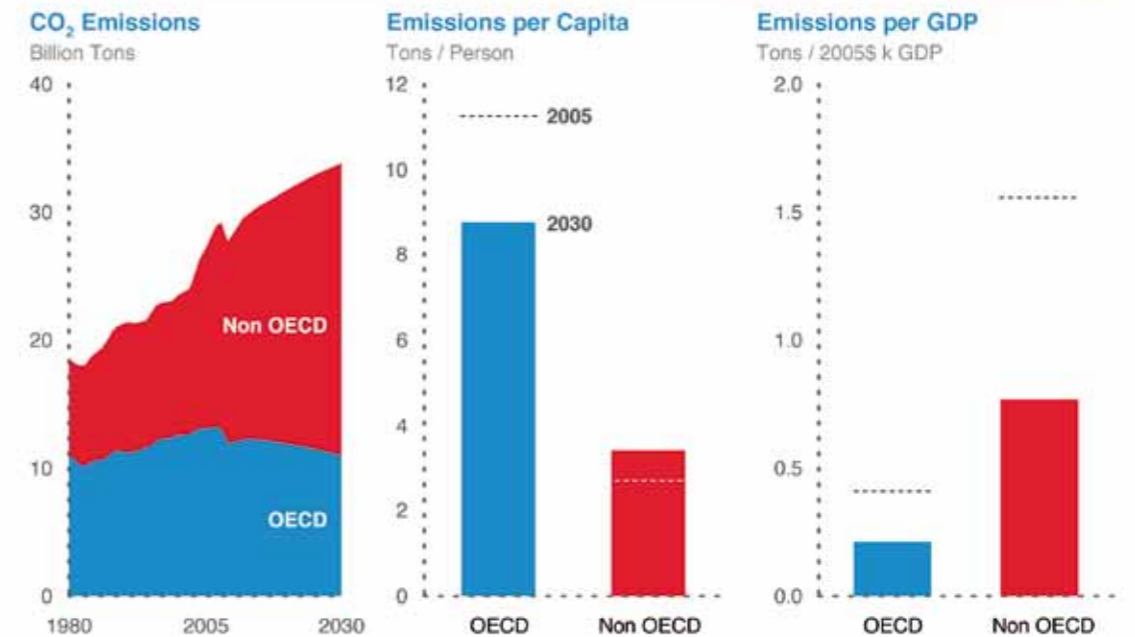
## CO<sub>2</sub> Emissions



28

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## CO<sub>2</sub> Emissions



30

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## Integrated Energy Solutions



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32

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