



The Outlook for Energy: A View to 2040

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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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Energy Outlook Development

100 countries

15 demand
sectors

20 fuel
types

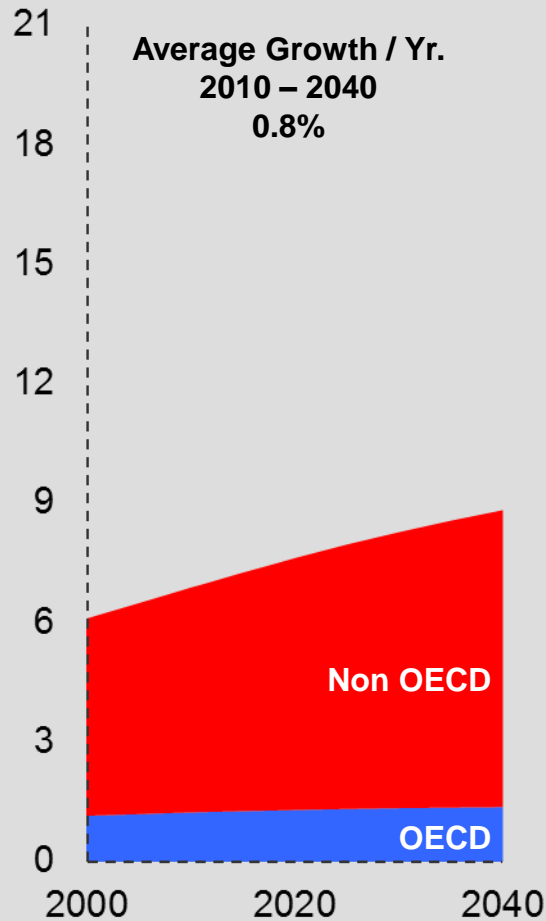
technology & policy

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Global Progress Drives Demand

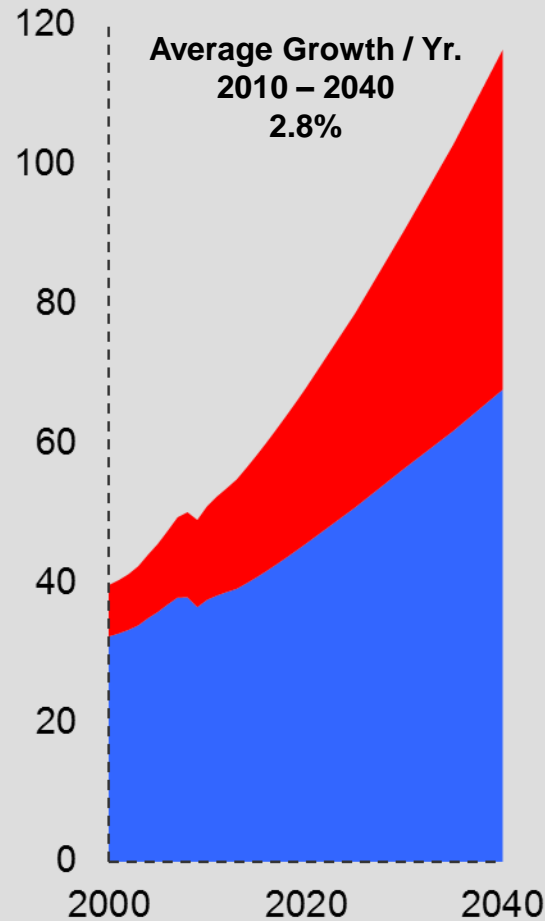
Population

Billion



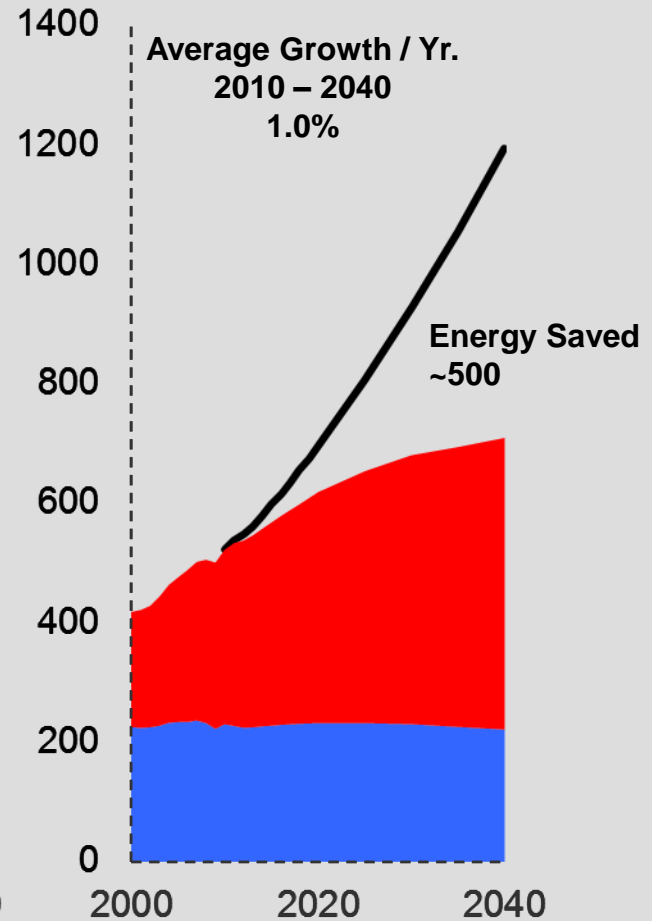
GDP

Trillion 2005\$



Energy Demand

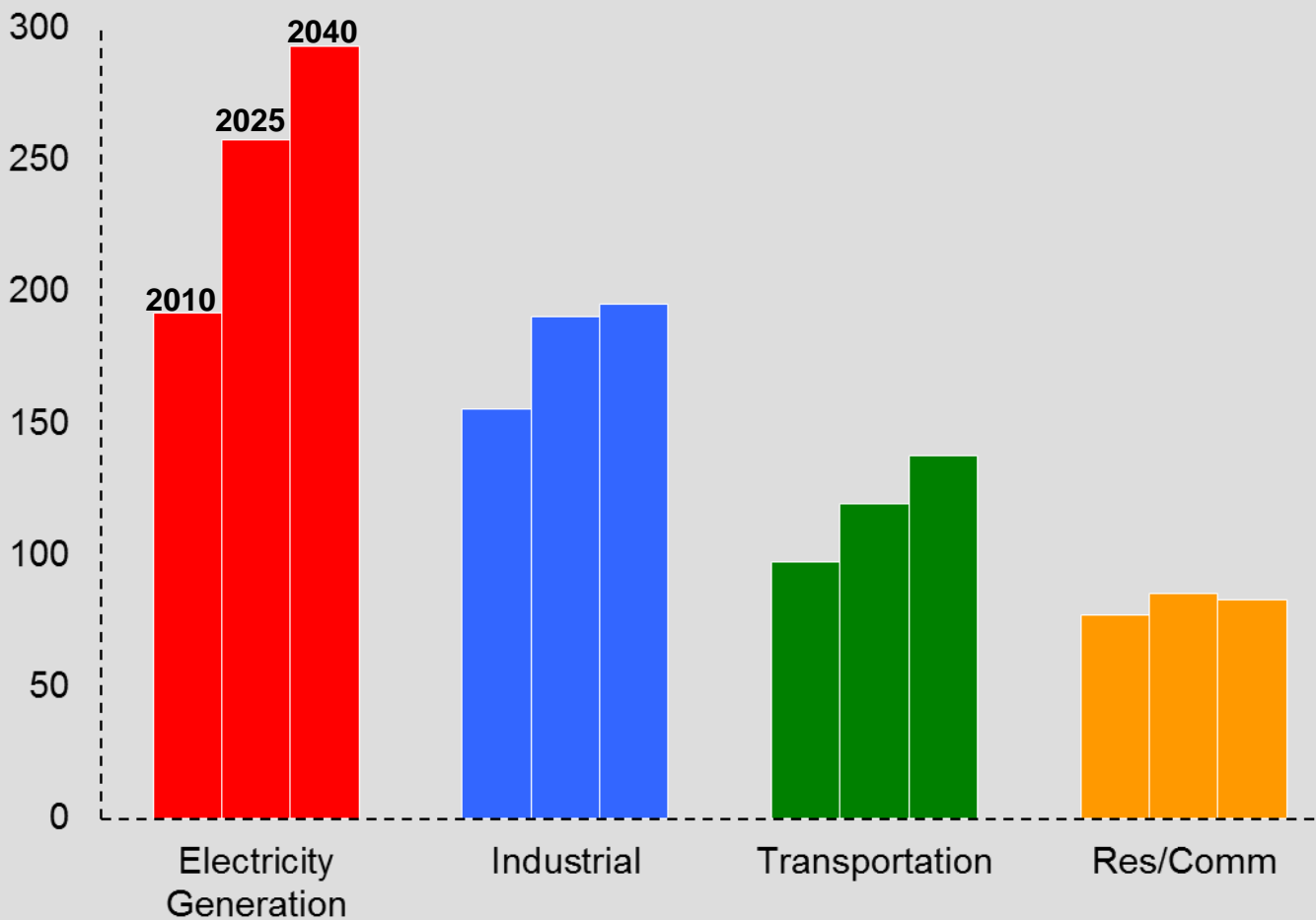
Quadrillion BTUs



Electricity Generation Leads Growth

Energy Demand by Sector

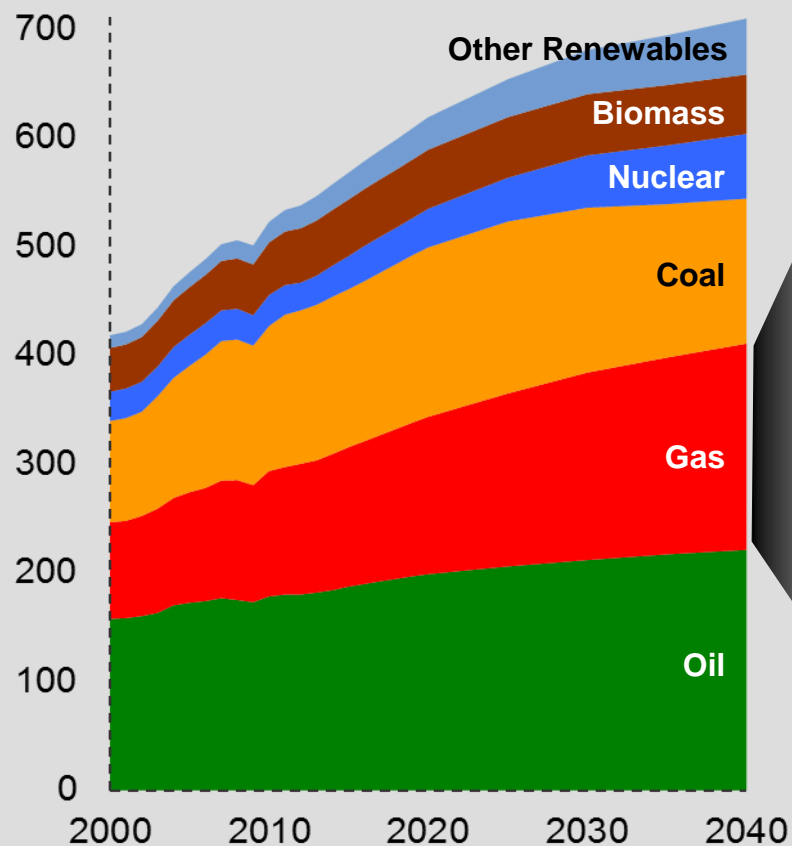
Quadrillion BTUs



Global Energy Demand

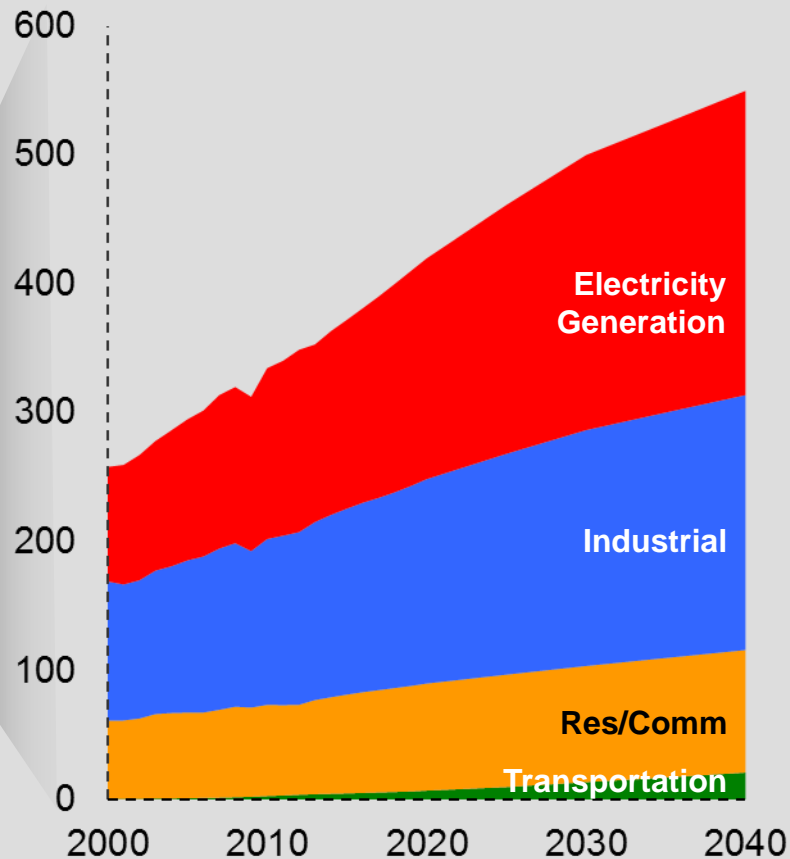
Total Demand

Quadrillion BTUs



Gas By Sector

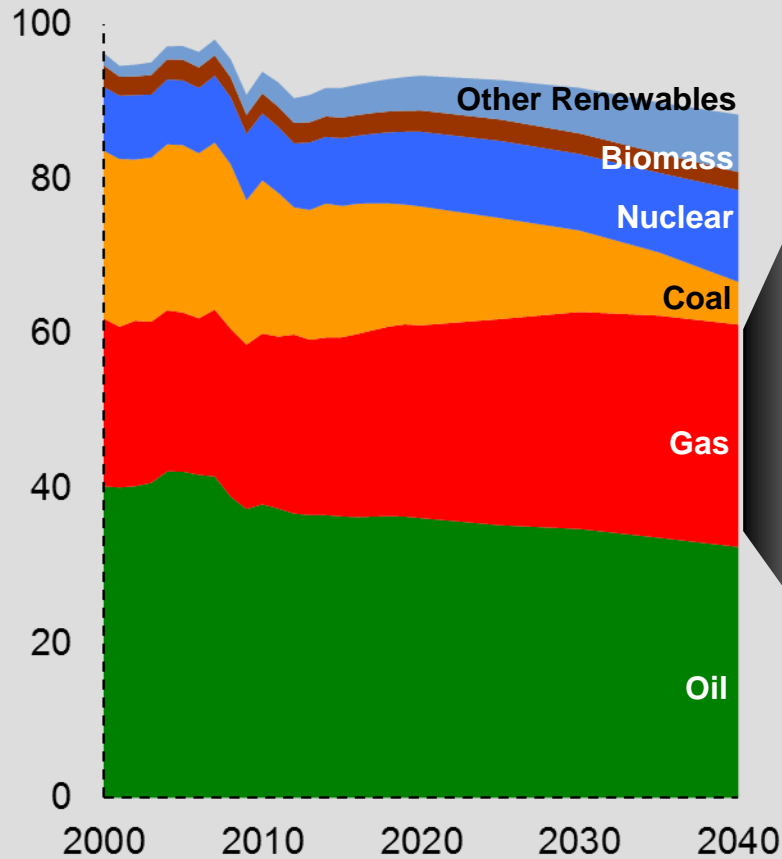
BCFD



United States Energy Demand

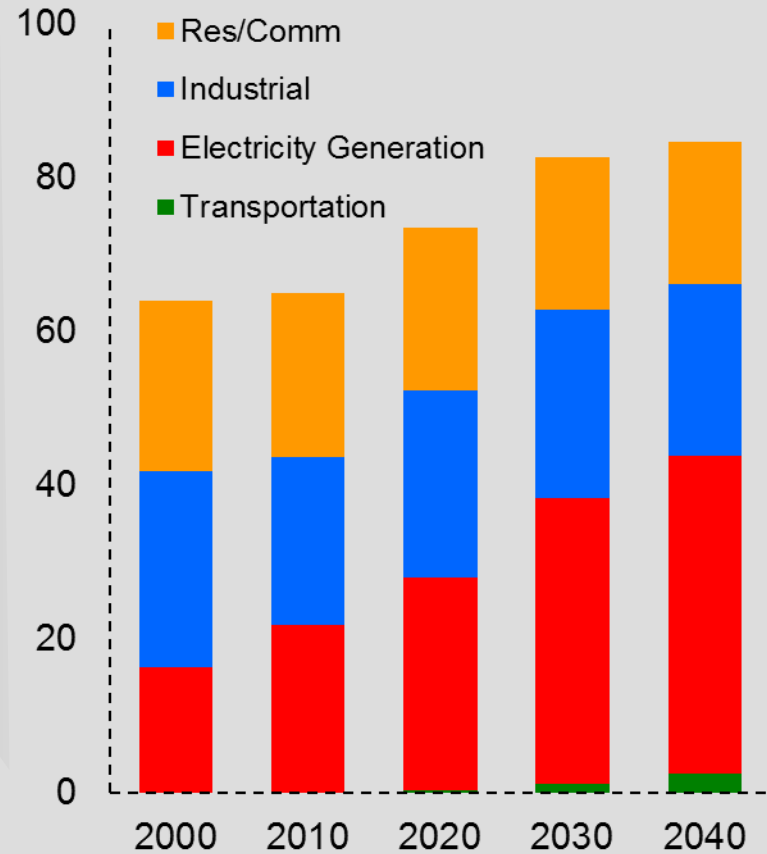
By Fuel

Quadrillion BTUs



Gas by Sector

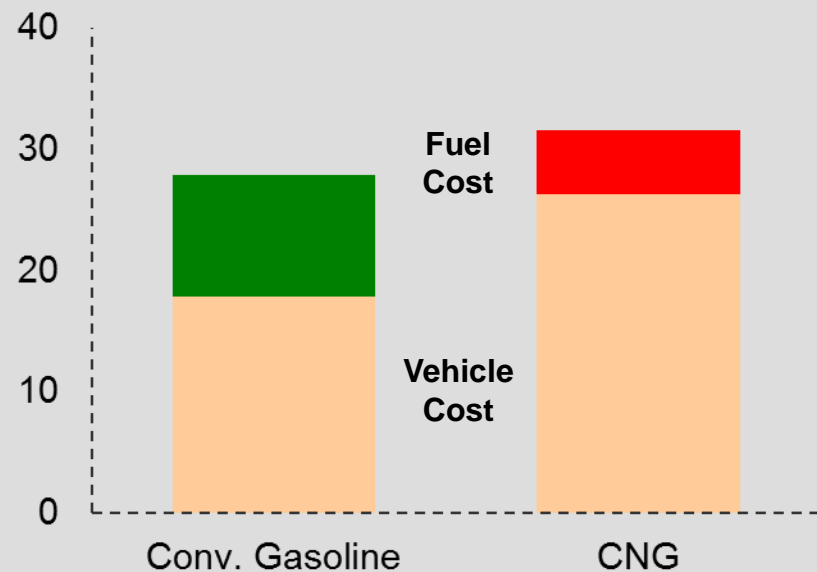
BCFD



U.S. Natural Gas Vehicle Economics

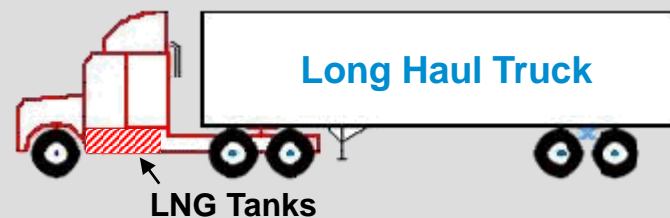
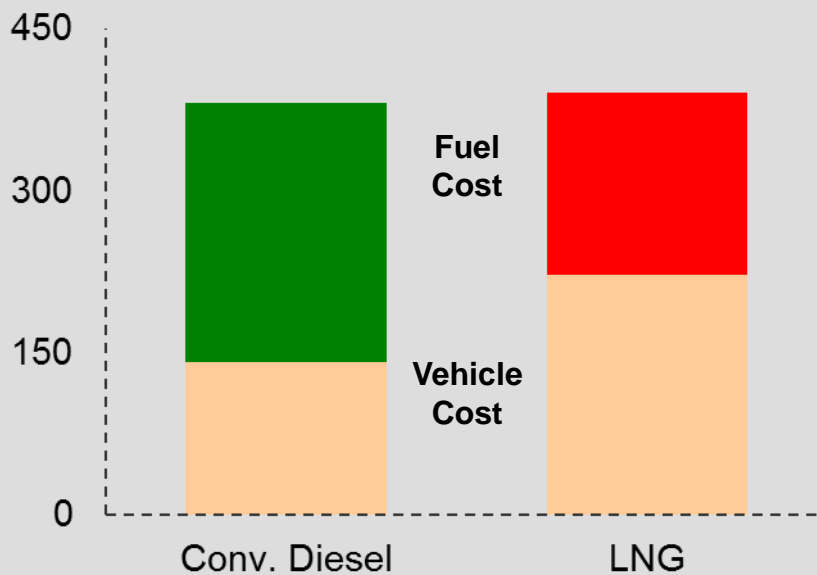
Light Duty Vehicles

5-yr. Cost of Ownership;
\$k



Heavy Duty Vehicles

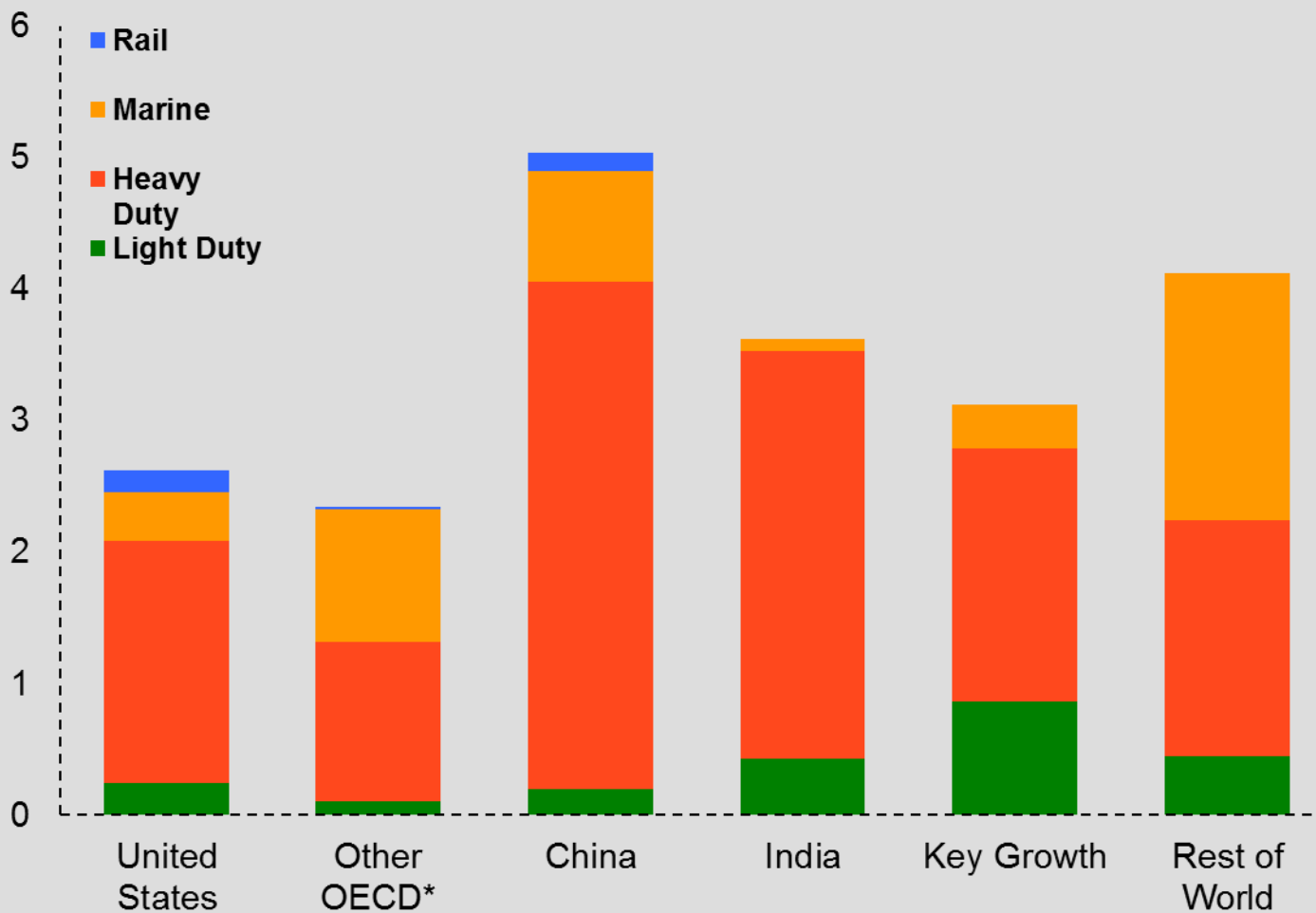
3-yr. Cost of Ownership;
\$k



Gas Into Transportation

2040 by Region

BCFD

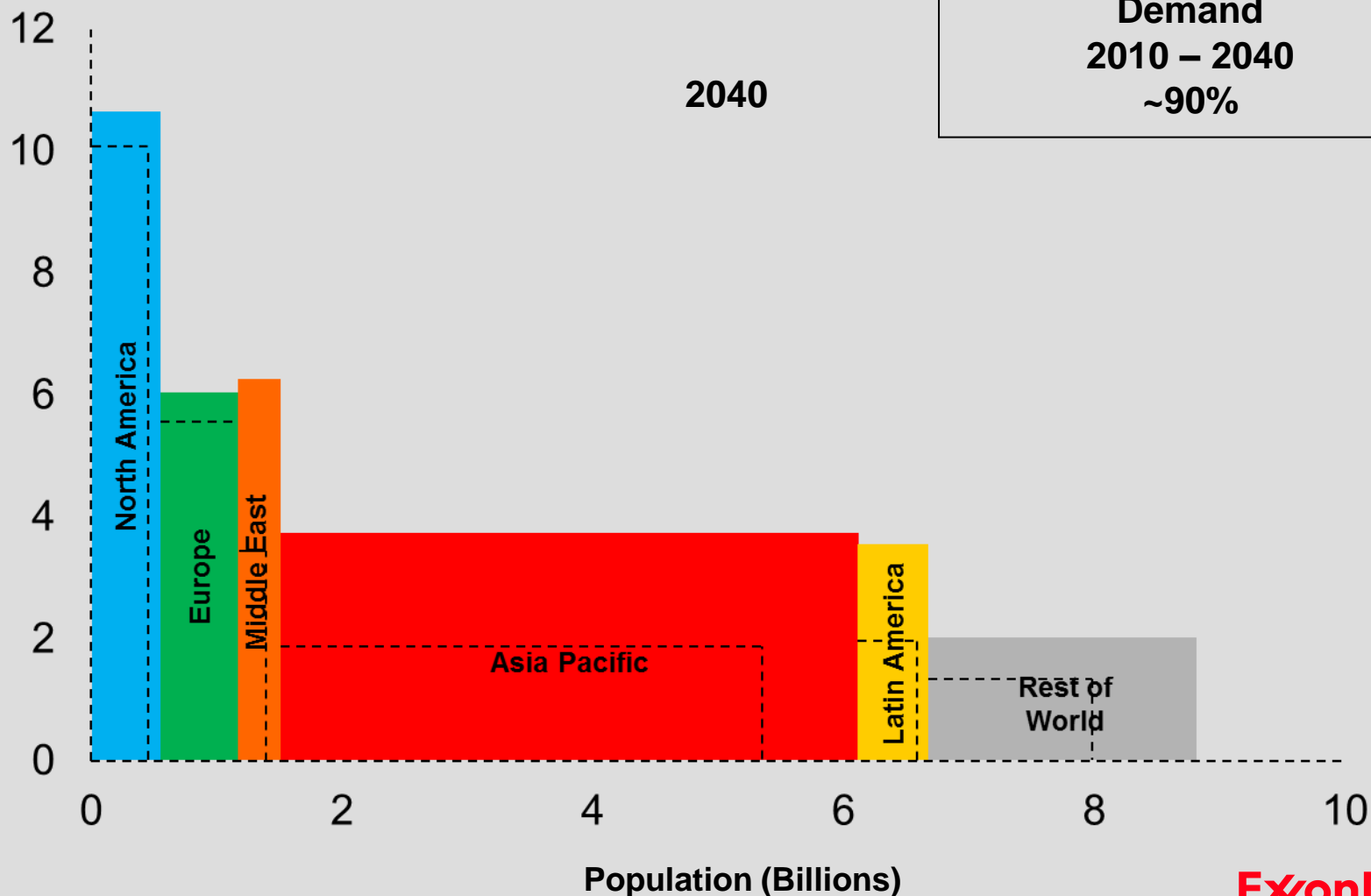


* Excludes Mexico and Turkey

Electricity Use by Region

Electricity Use

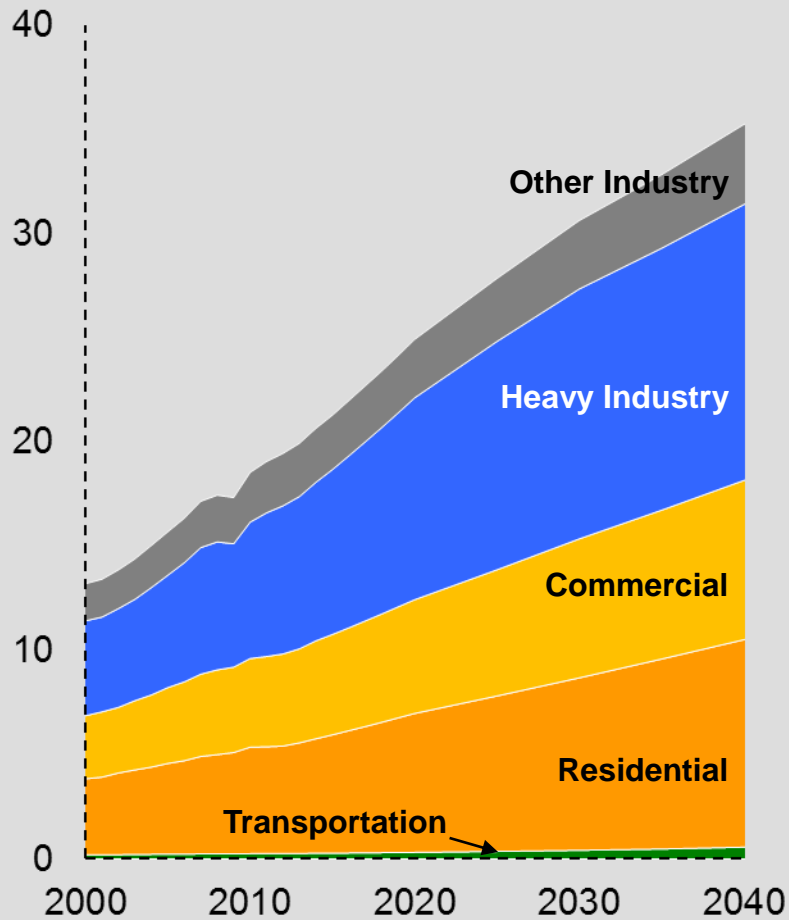
1000 KWh per Capita



Electricity Demand

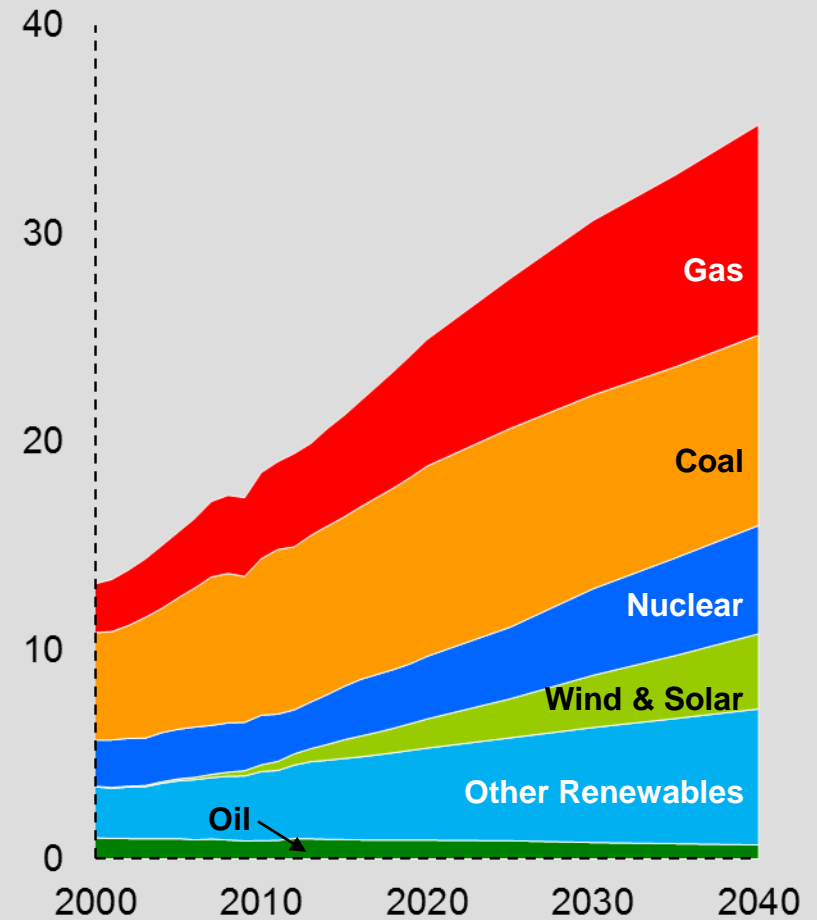
Global Electrical Demand by Sector

Thousand TWh



Global Electrical Demand by Fuel

Thousand TWh



Pennsylvania's 15x Increase

Pennsylvania Natural Gas Production

BCFD

10

- Unconventional
- Conventional

8

6

4

2

0

2005

2006

2007

2008

2009

2010

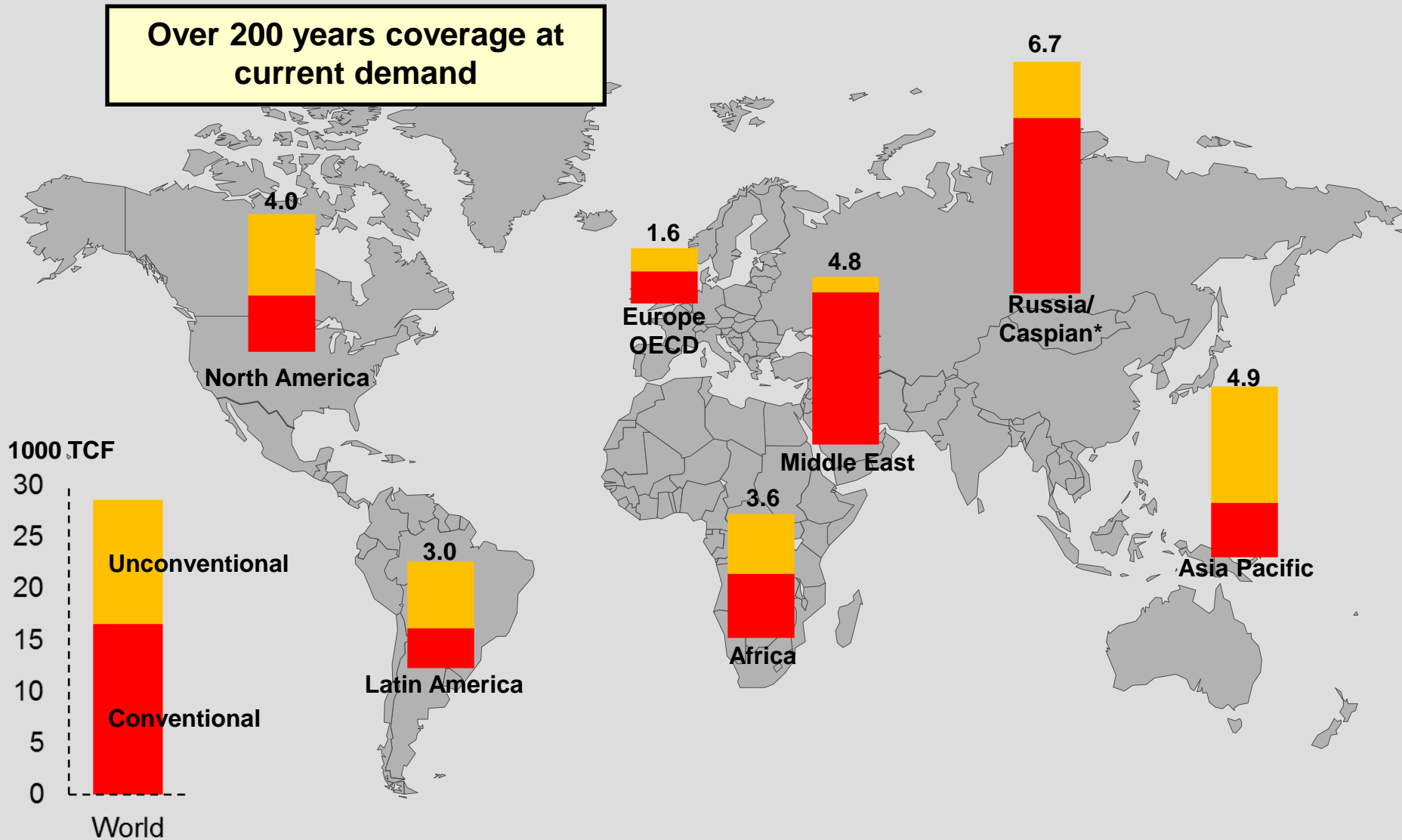
2011

2012

1H13

Remaining Global Gas Resource

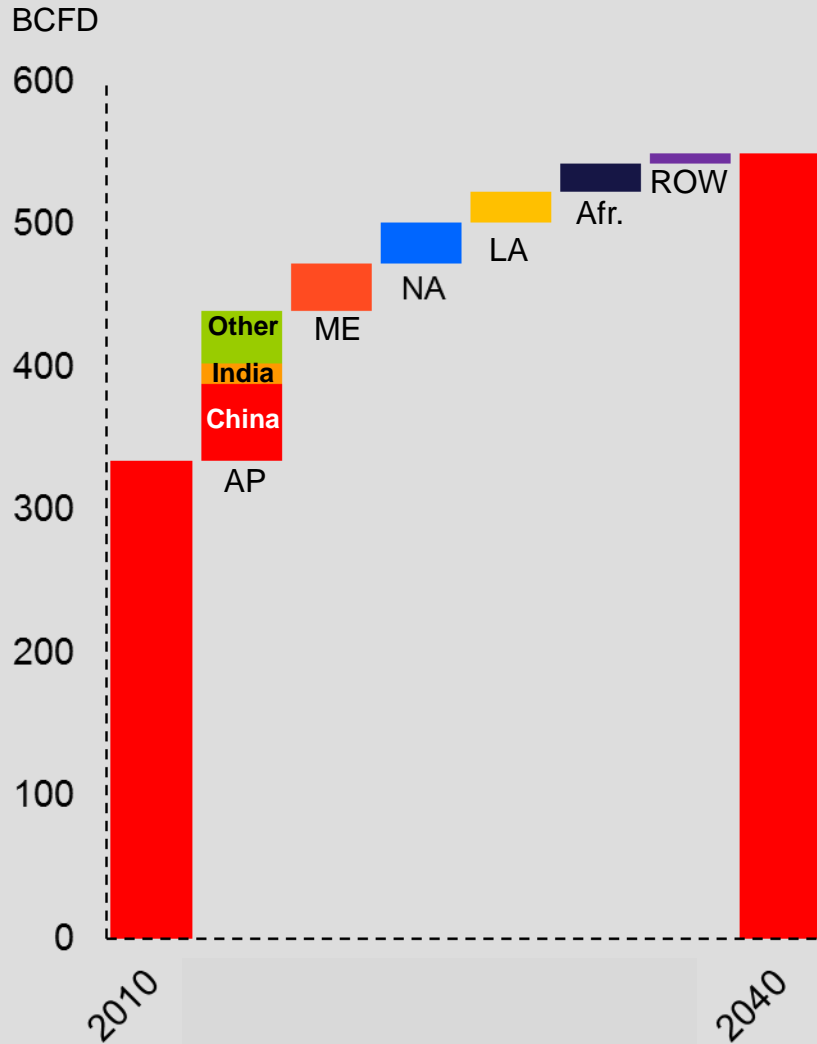
Over 200 years coverage at current demand



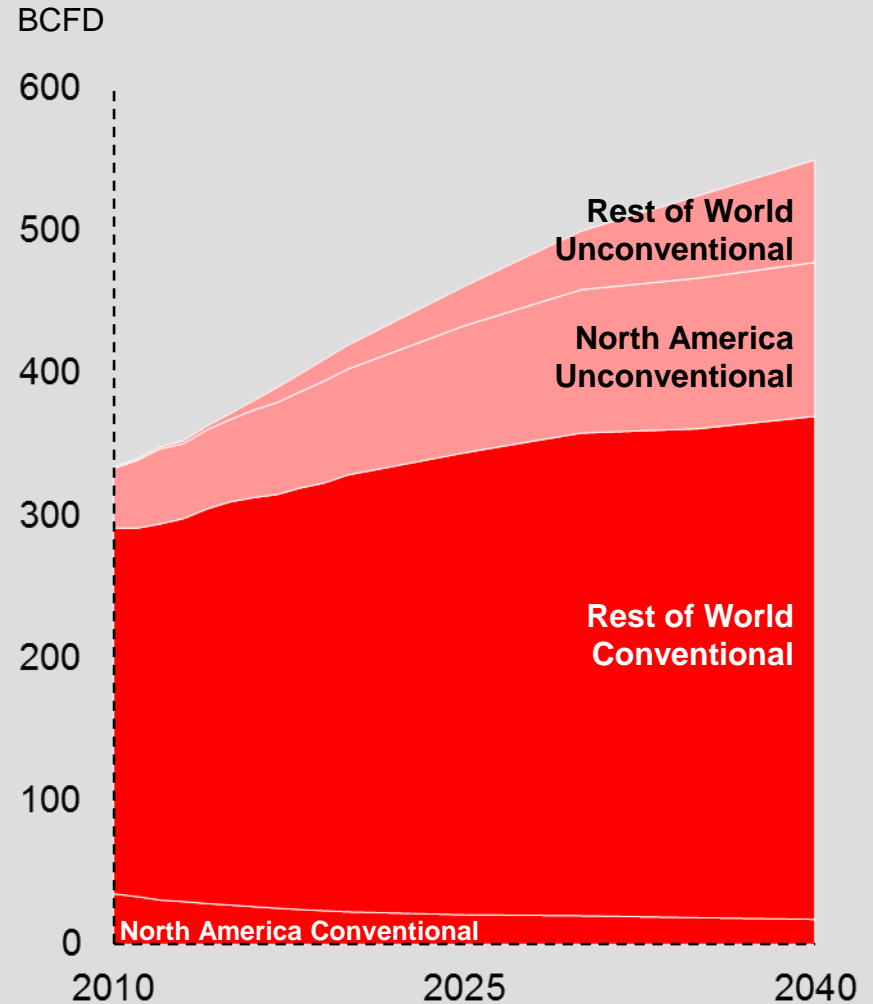
Source: IEA; *Includes Europe Non OECD
ExxonMobil 2014 Outlook for Energy

Natural Gas Supply and Demand Shifts

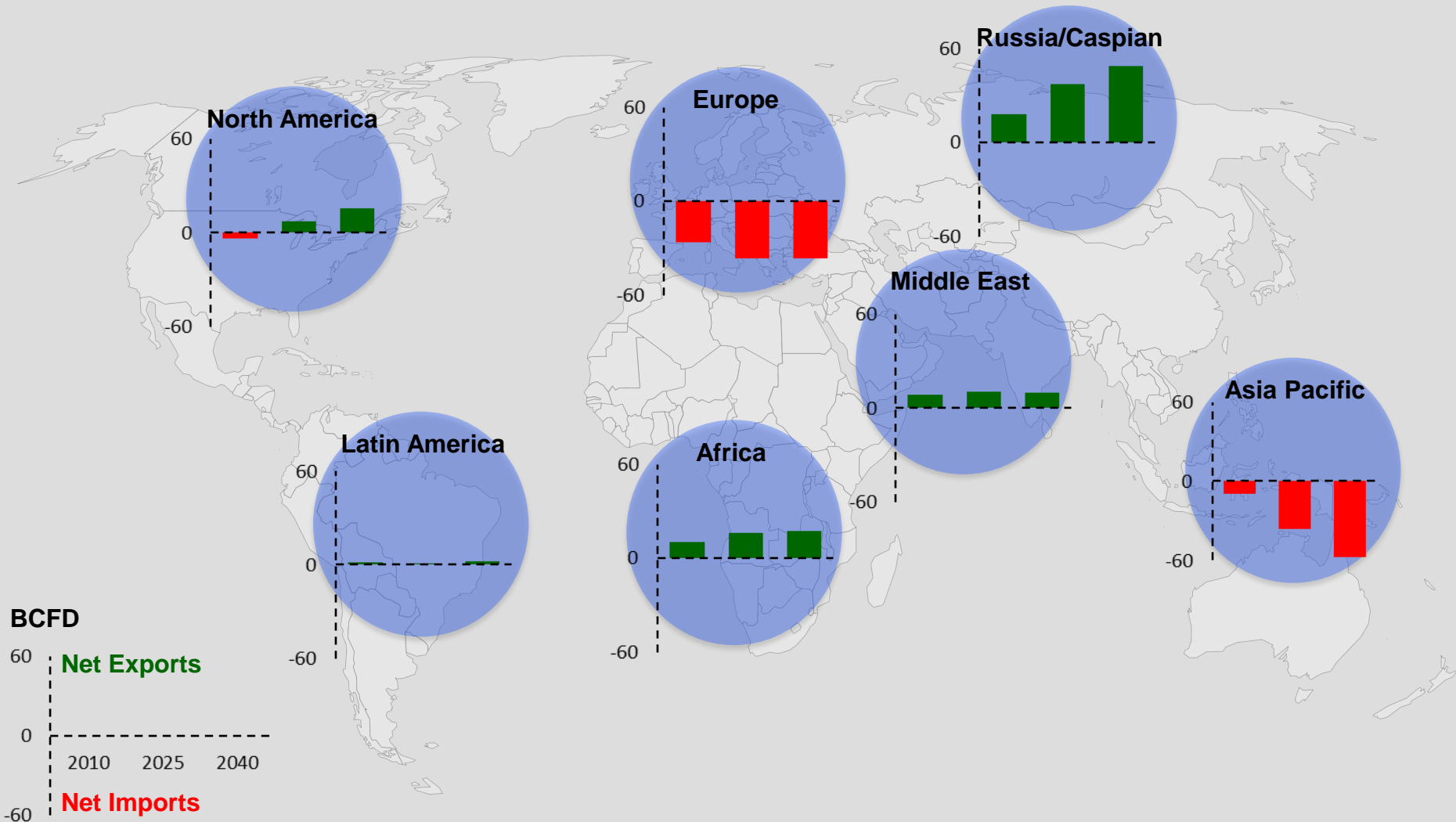
Global Gas Demand



Global Gas Supply



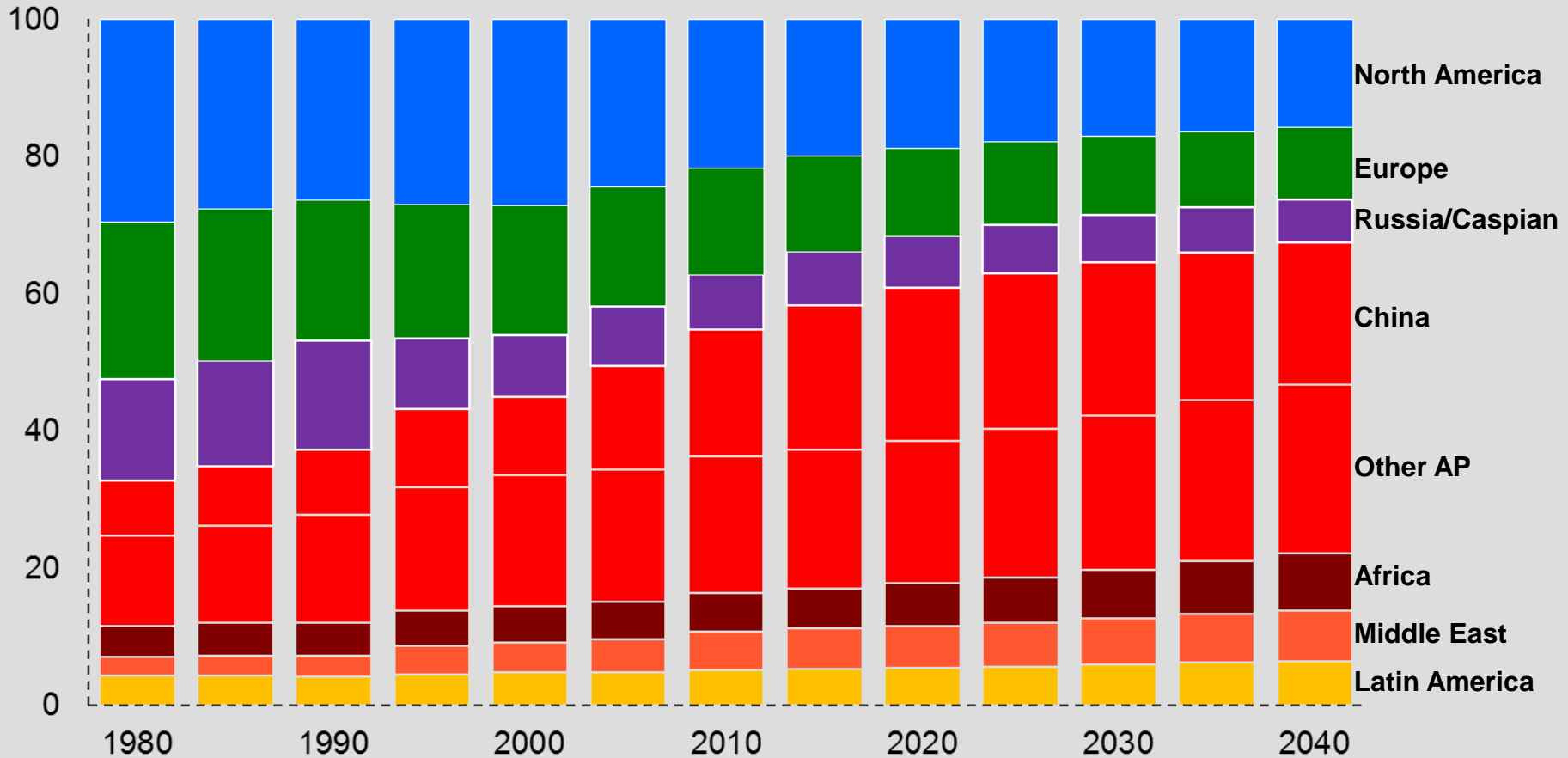
Natural Gas Trade



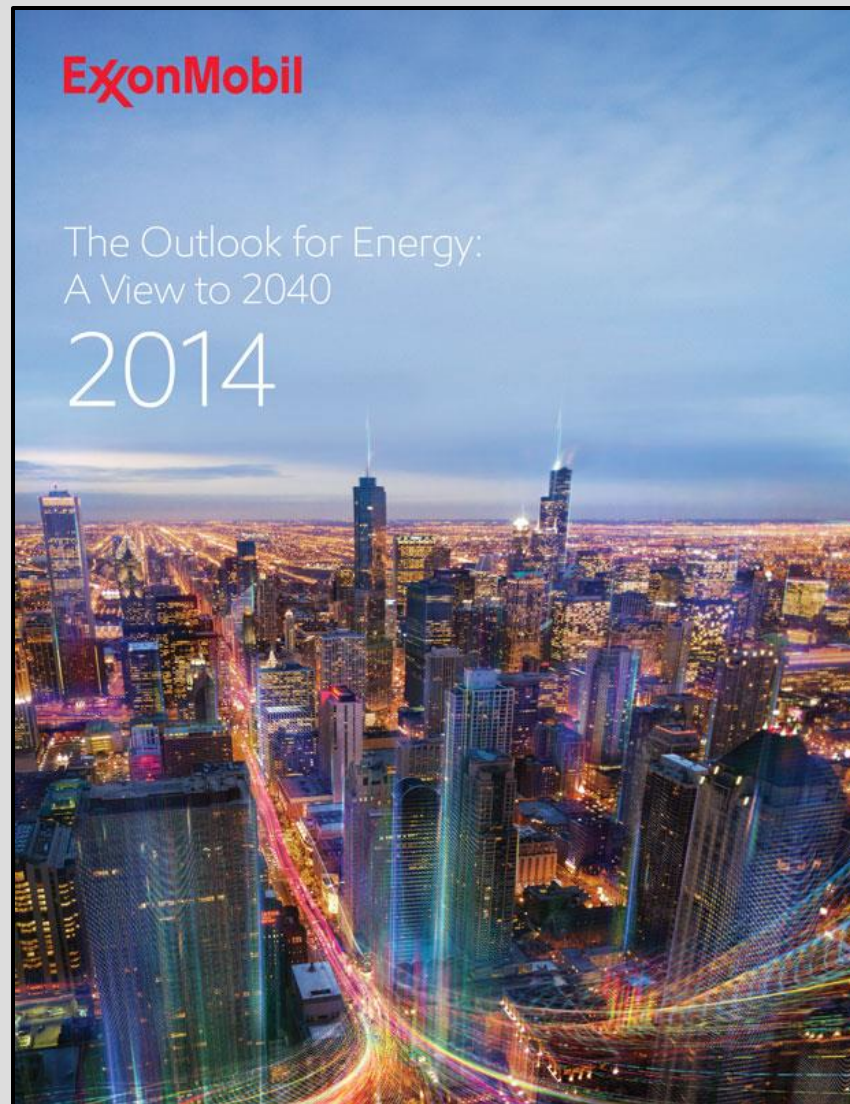
Regional Energy Trends Evolve

By Region

Percent of World Total



Conclusions



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