

The Outlook for Energy: A View to 2040

Lynne Taschner
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ExxonMobil
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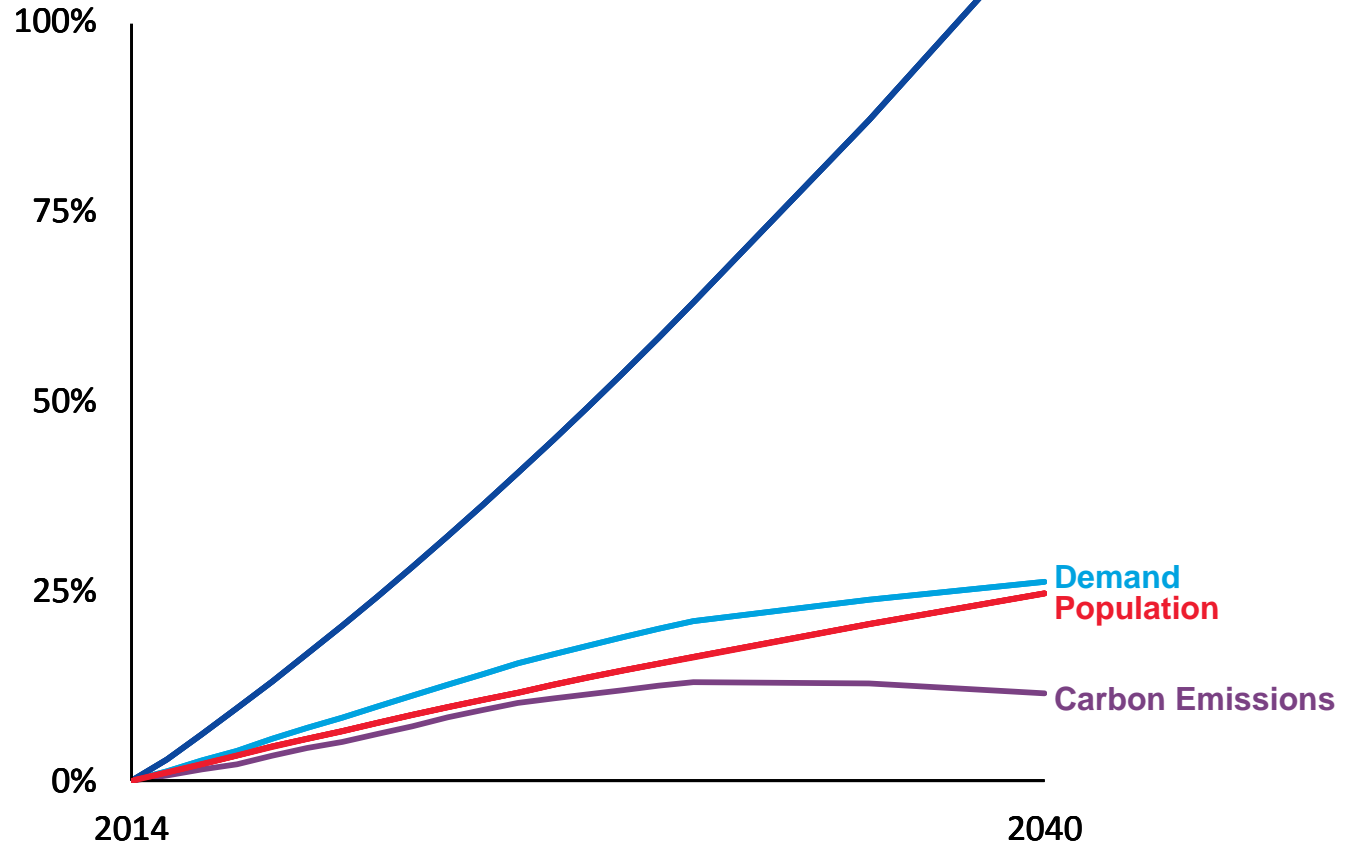
2016

The Outlook for Energy includes Exxon Mobil Corporation's internal estimates and forecasts of energy demand, supply, and trends through 2040 based upon internal data and analyses as well as publicly available information from external sources including the International Energy Agency. Work on the report was conducted throughout 2015. This presentation includes forward looking statements. Actual future conditions and results (including energy demand, energy supply, the relative mix of energy across sources, economic sectors and geographic regions, imports and exports of energy) could differ materially due to changes in economic conditions, 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. This material is not to be used or reproduced without the permission of Exxon Mobil Corporation. All rights reserved.

Global Trends Continue to Evolve

Growth from 2014 Level

Percent



Key Energy Outlook Themes



Energy is fundamental to **standards of living**.



Developing nations lead gains in GDP and living standards.



Economics and **policies** impact the fuel mix.



Oil remains the world's primary fuel through 2040.



Natural gas grows more than any other energy source.

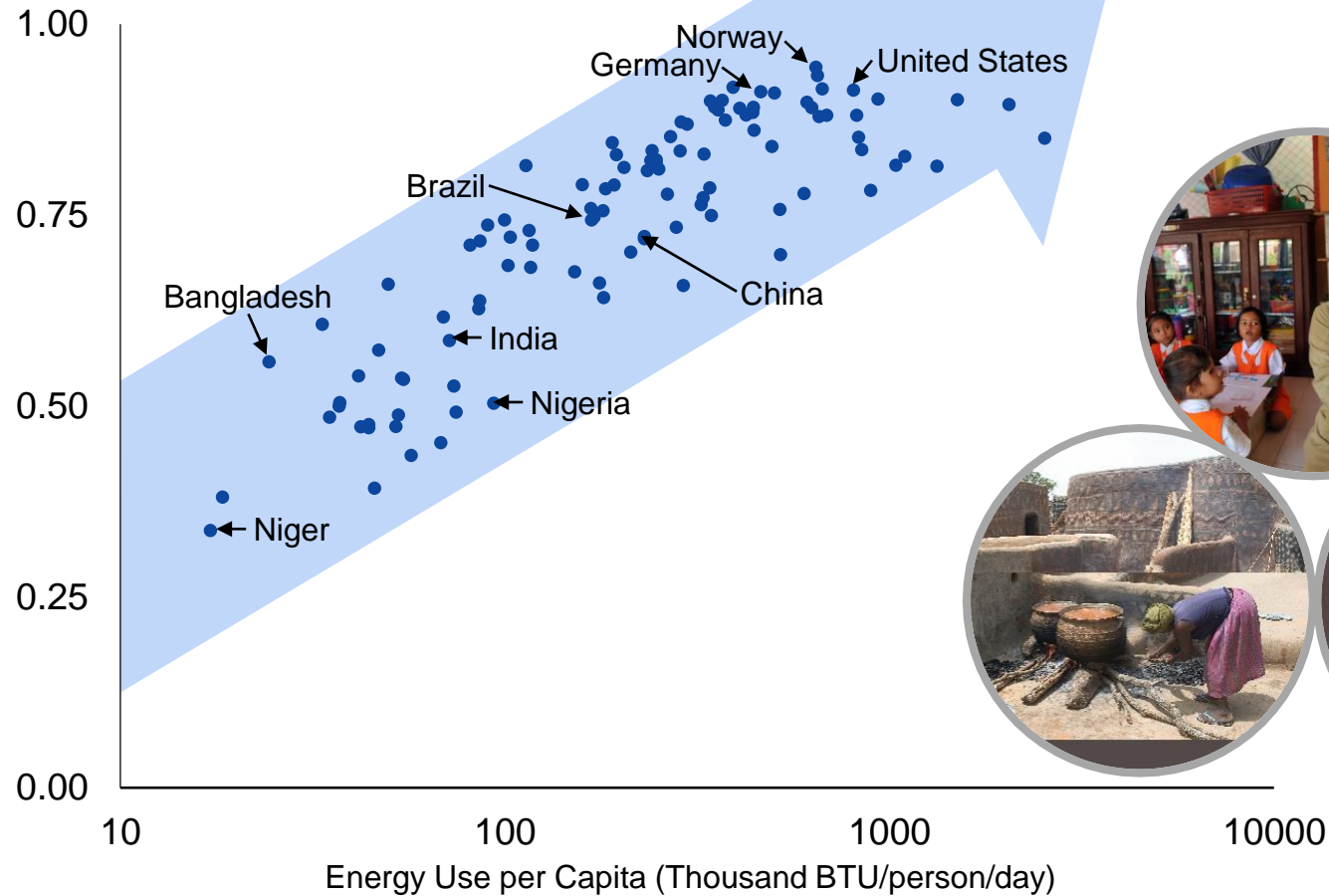


Technology has the highest potential and greatest uncertainty.

Energy Fuels Human Development

U.N. Human Development Index

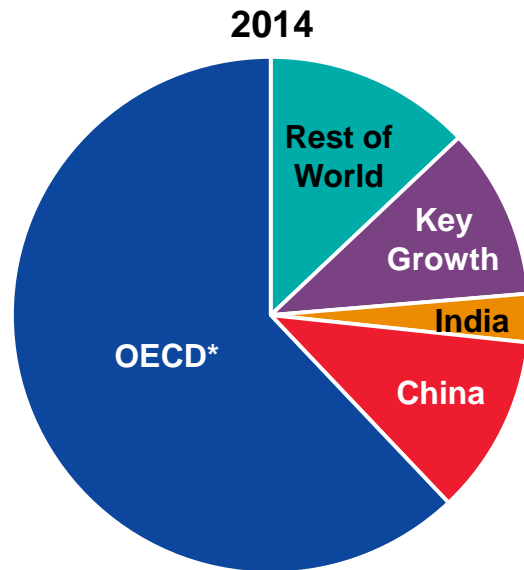
2013 Index



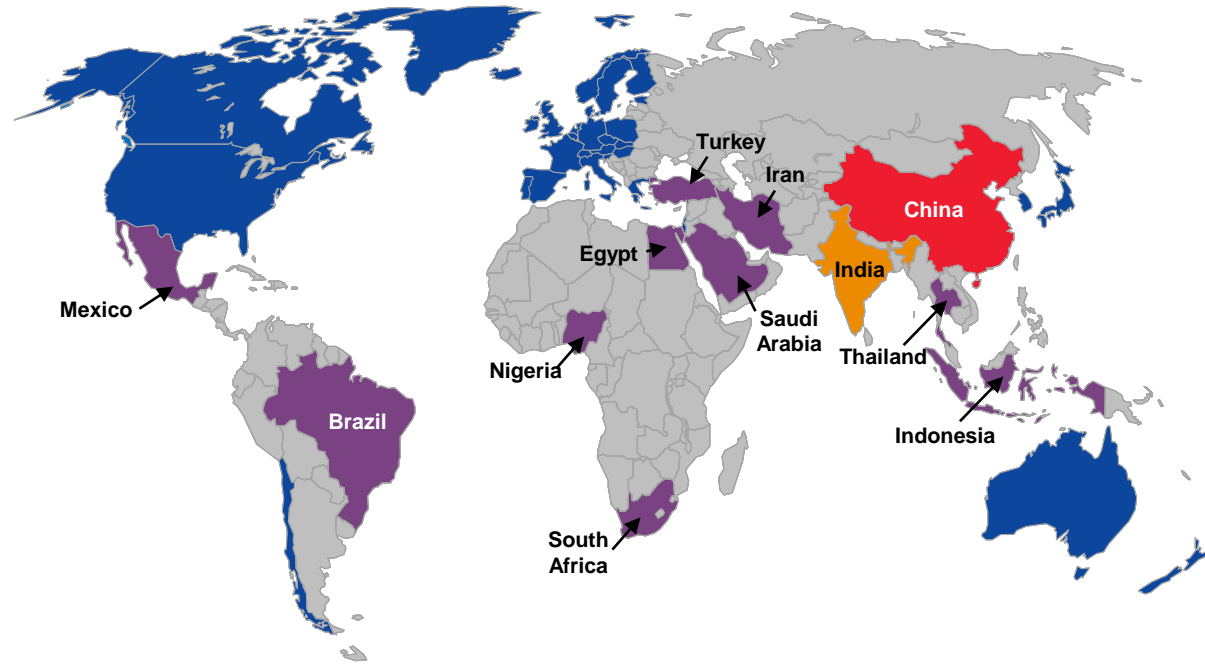
Source: United Nations, ExxonMobil estimates



Global GDP Shifts Toward Developing Nations

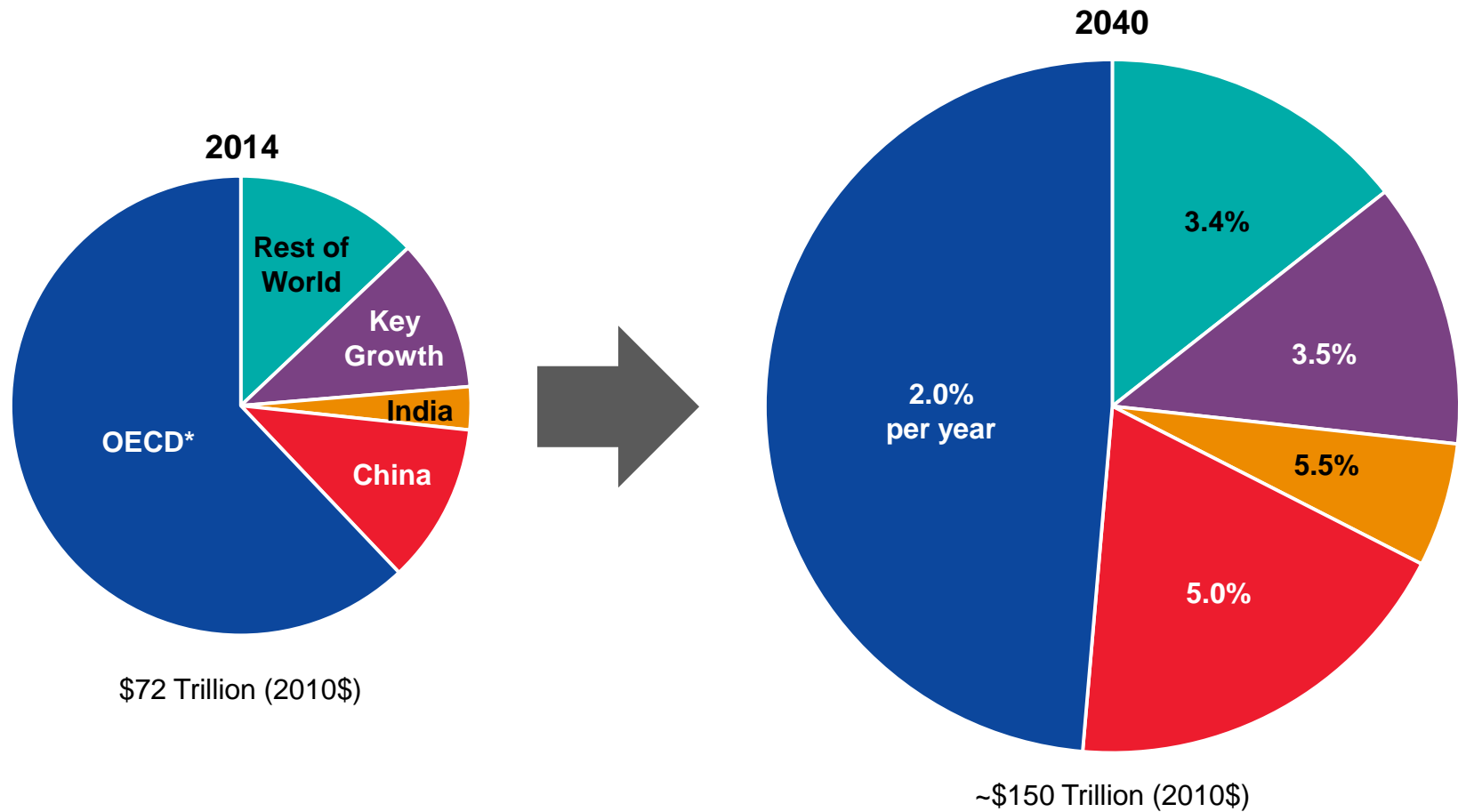


\$72 Trillion (2010\$)



*Mexico and Turkey included in Key Growth countries

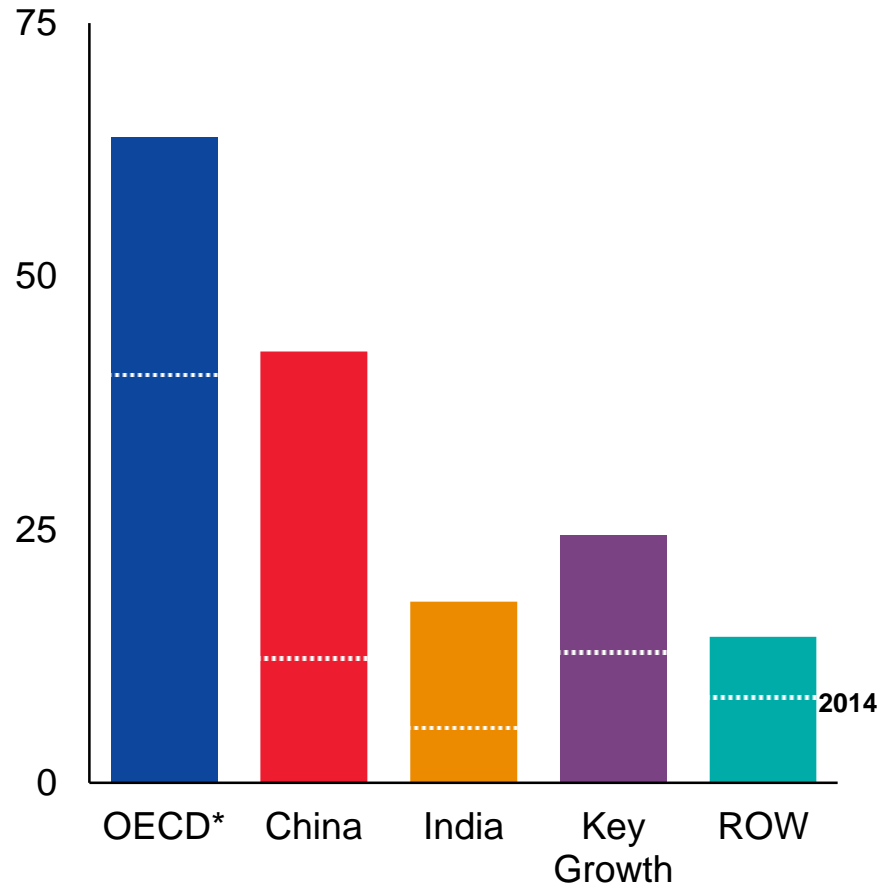
Global GDP Shifts Toward Developing Nations



**Mexico and Turkey included in Key Growth countries*

Standards of Living Increase in the Non OECD

2040 GDP per Capita
PPP 2011\$k



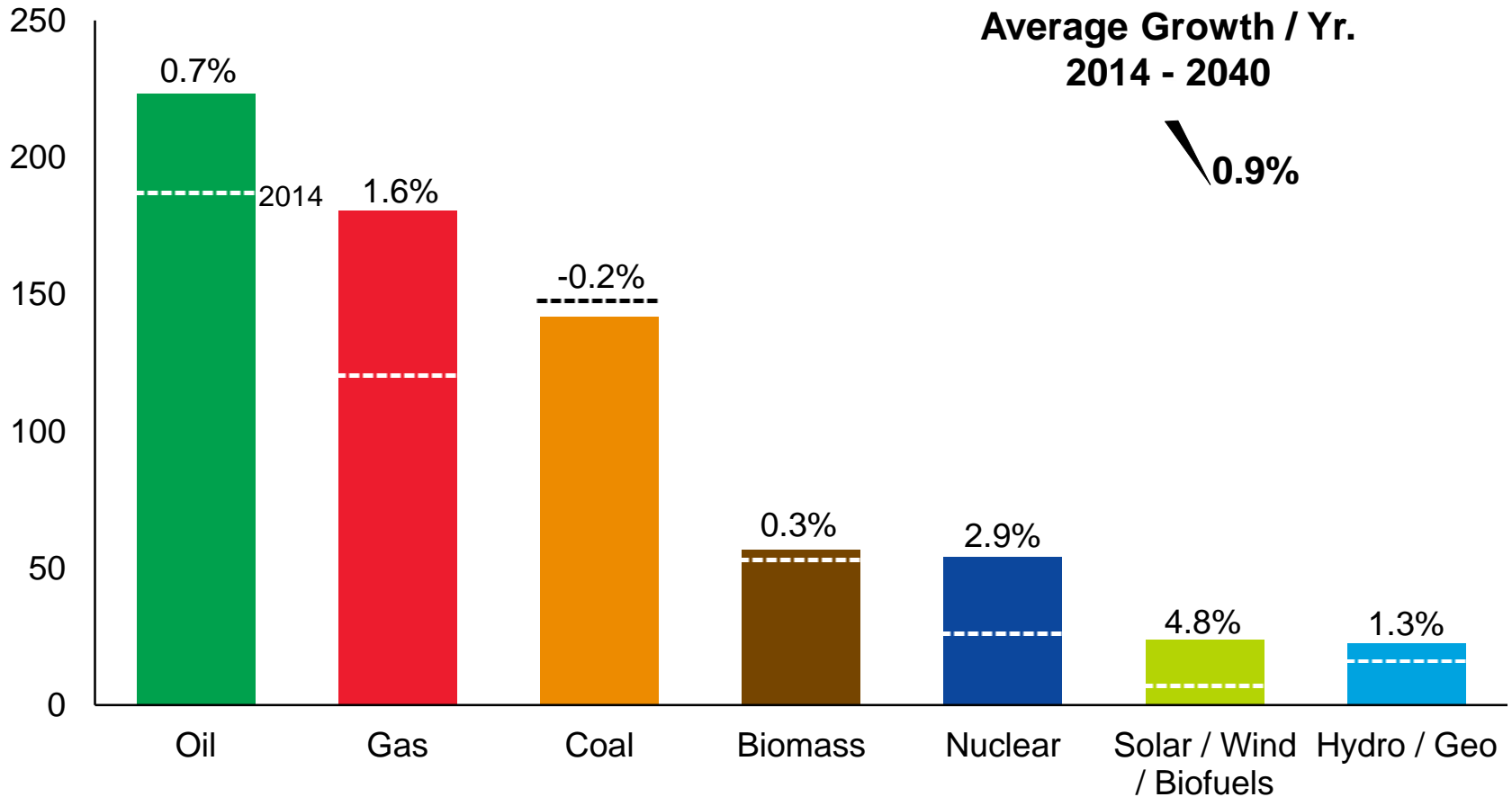
*Mexico and Turkey included in Key Growth countries



Global Demand

2040 By Fuel

Quadrillion BTUs



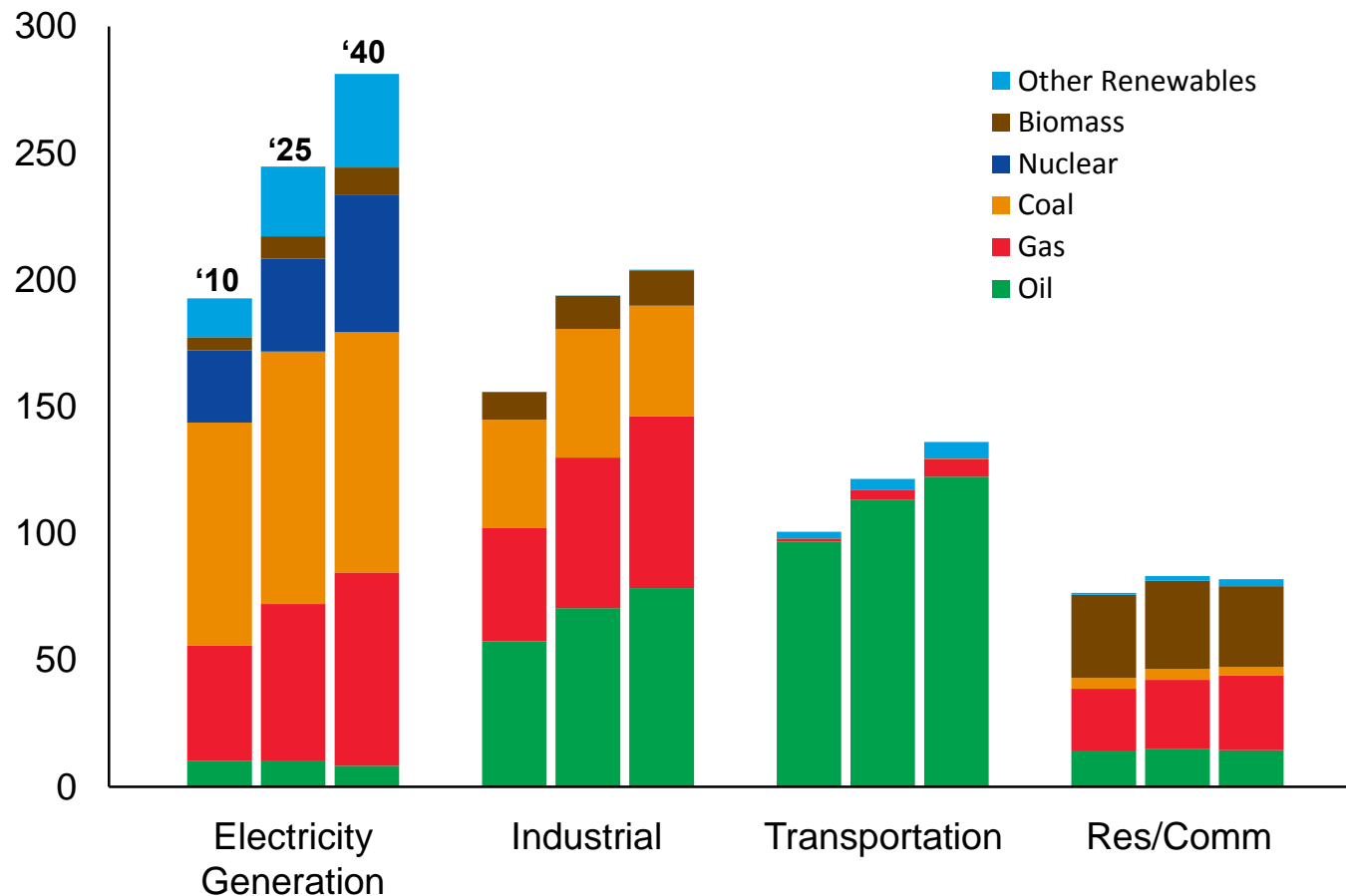


Natural gas grows
more than any other
energy source.

Electricity Generation Leads Growth

Primary Energy Demand by Sector

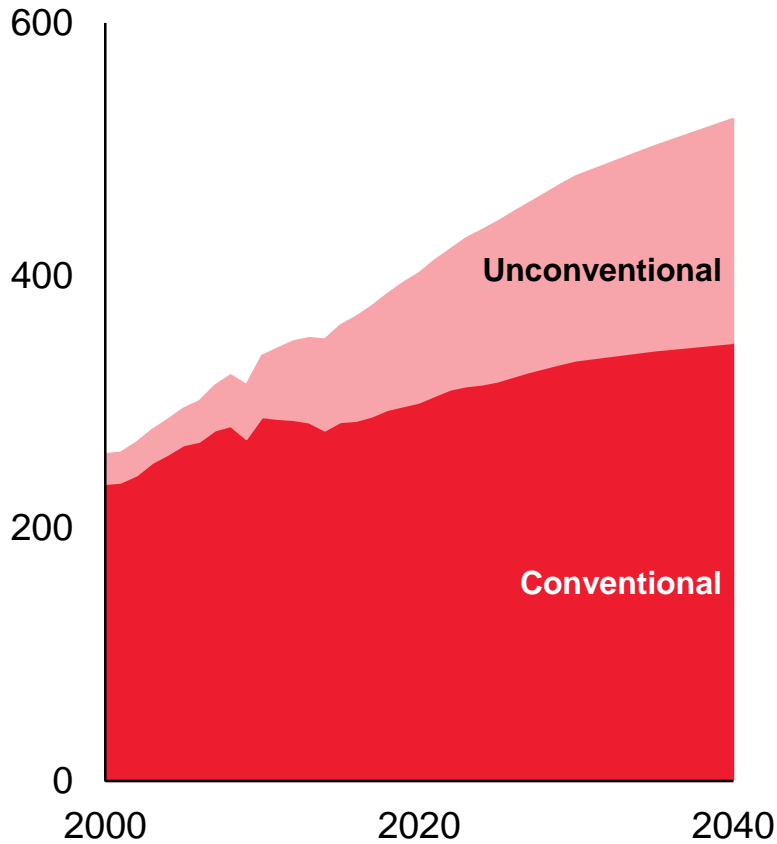
Quadrillion BTUs



Natural Gas Supply

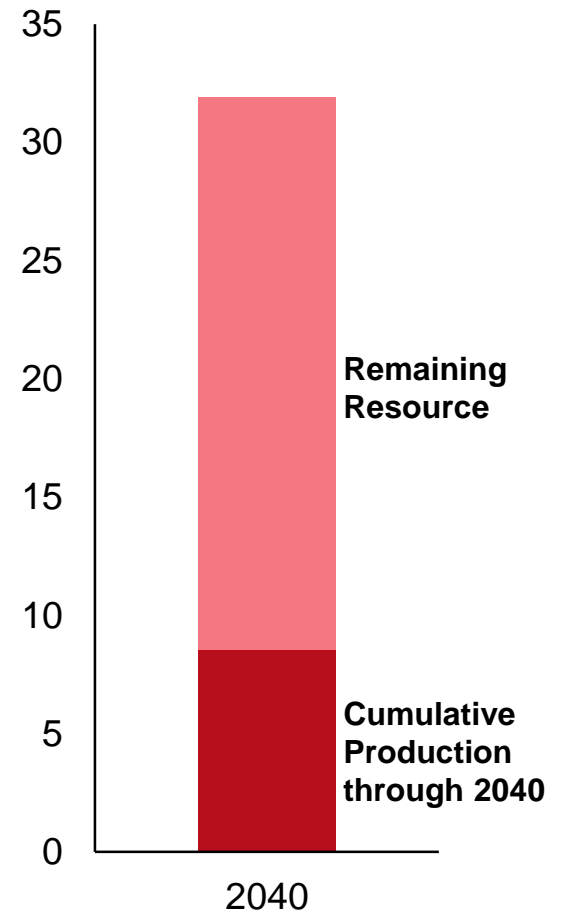
By Production Type

BCFD



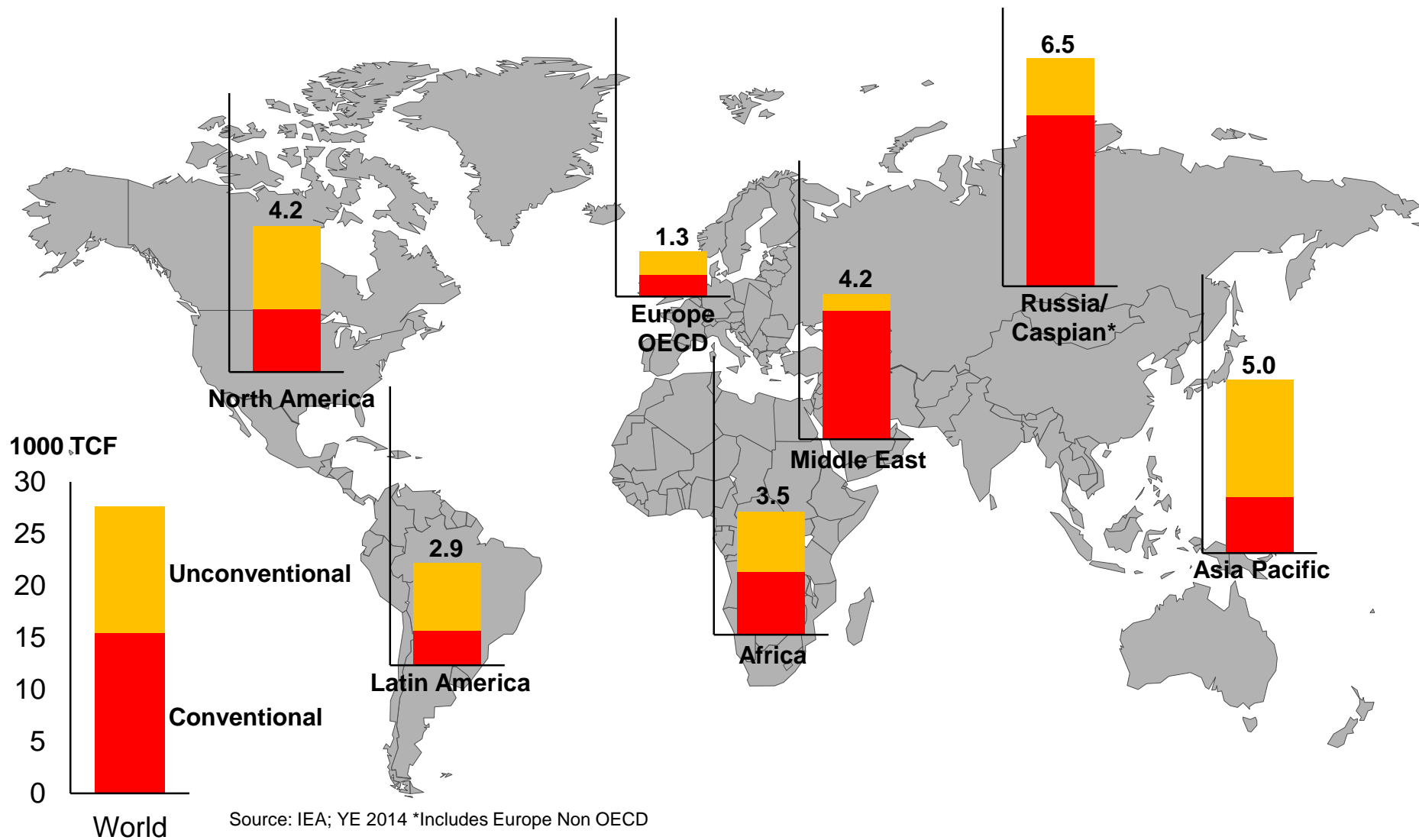
Natural Gas Resources*

Thousand TCF

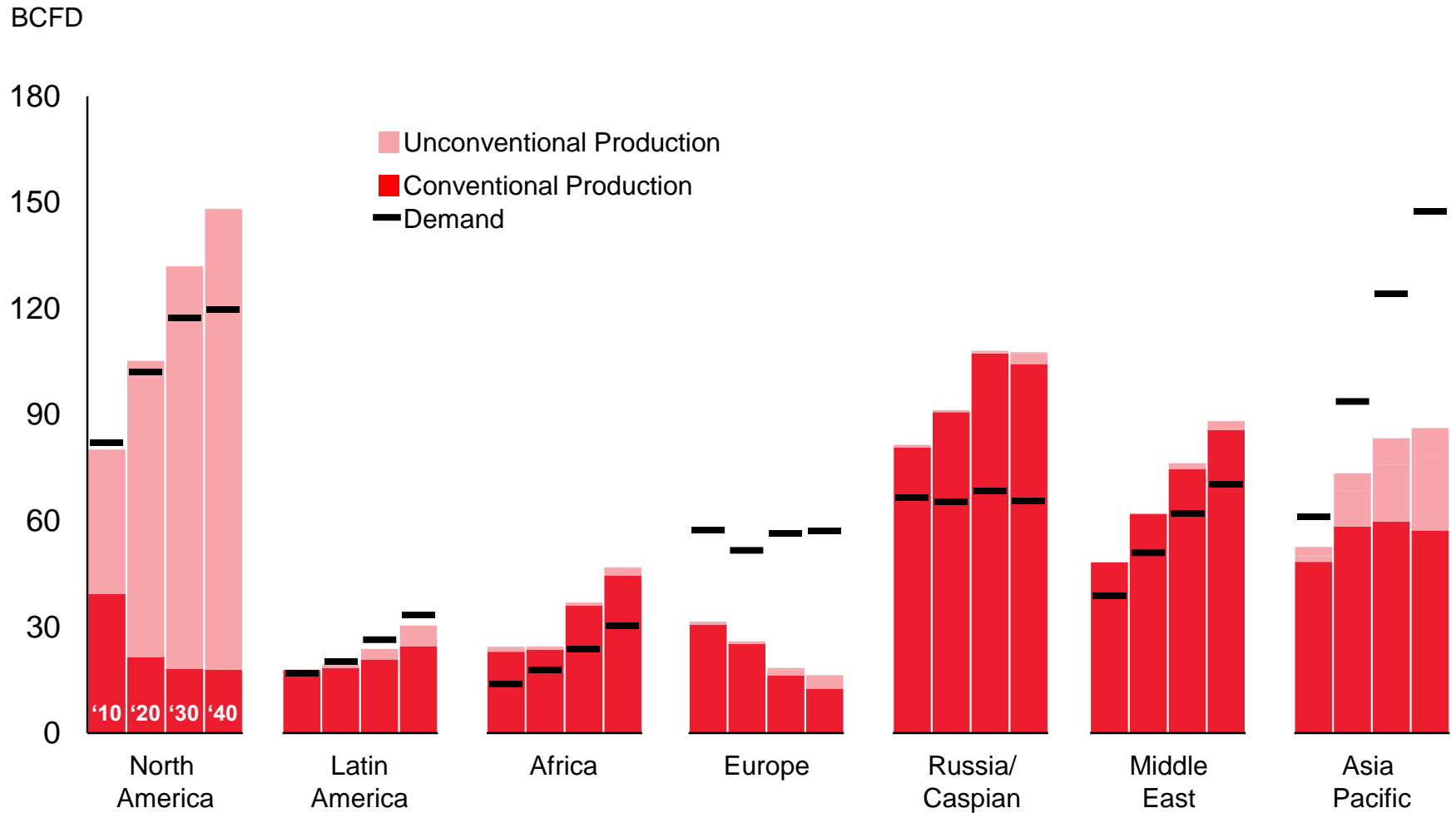


* Source: IEA

Remaining Global Gas Resource



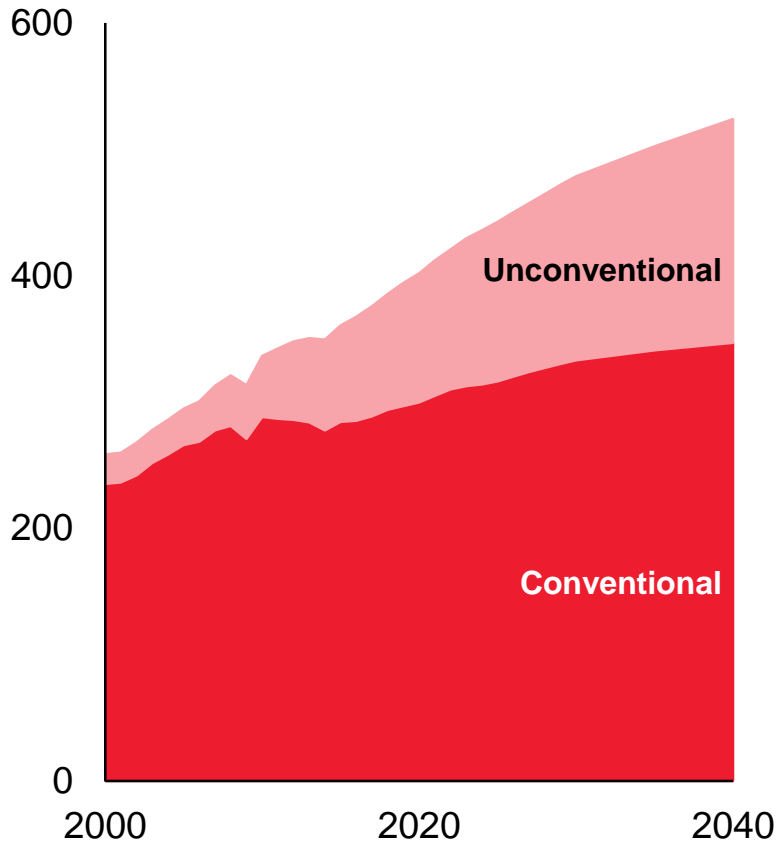
Gas Trade Balance by Region



Natural Gas Supply

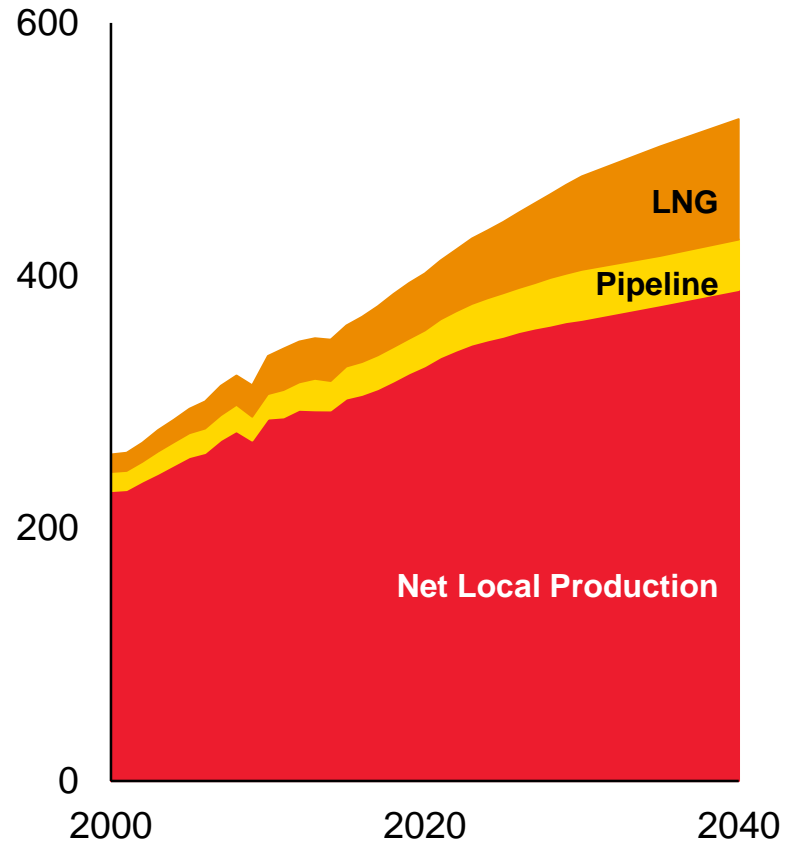
By Production Type

BCFD



By Delivery Type

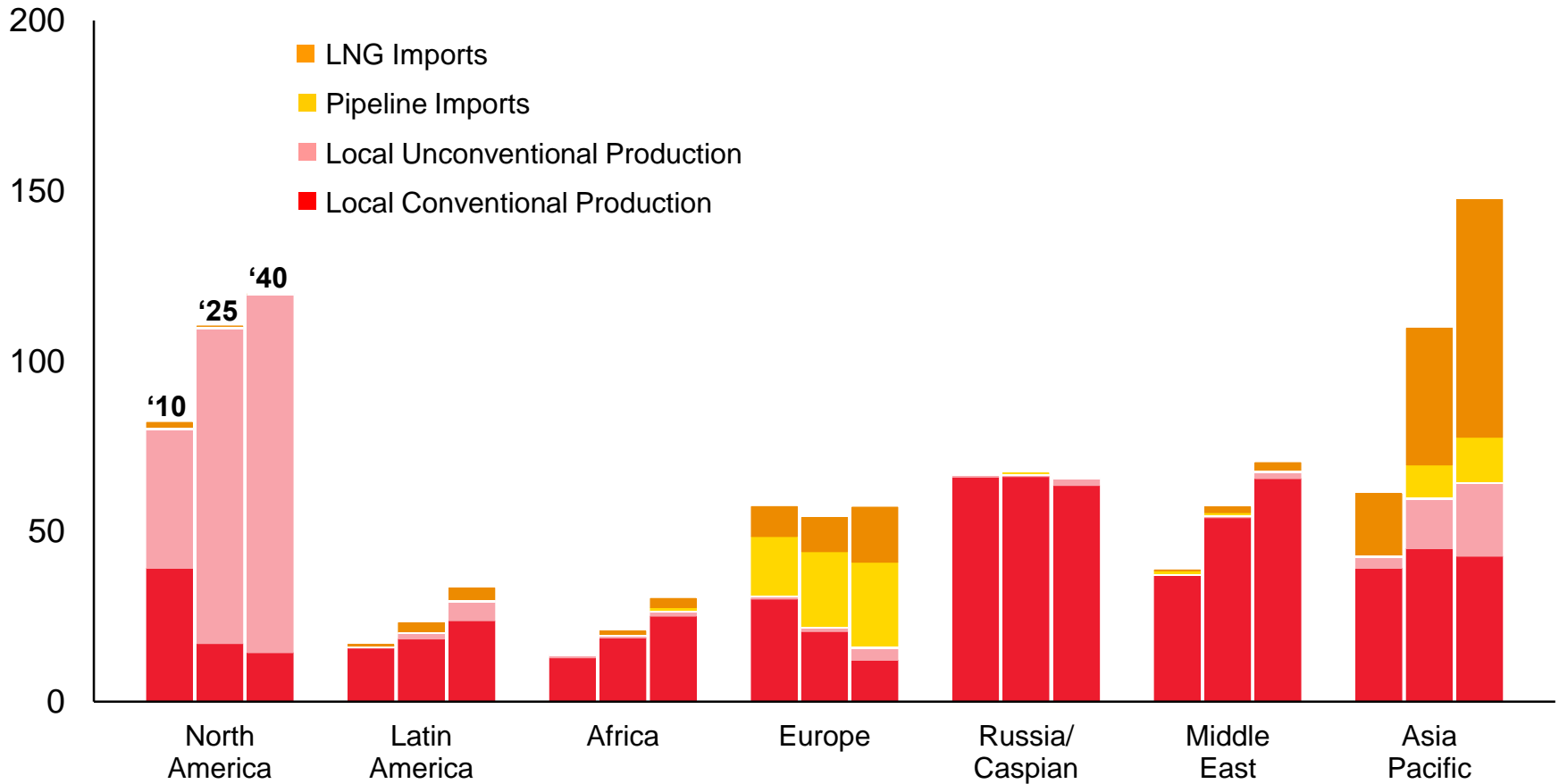
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Gas Demand

By Region and Supply Type

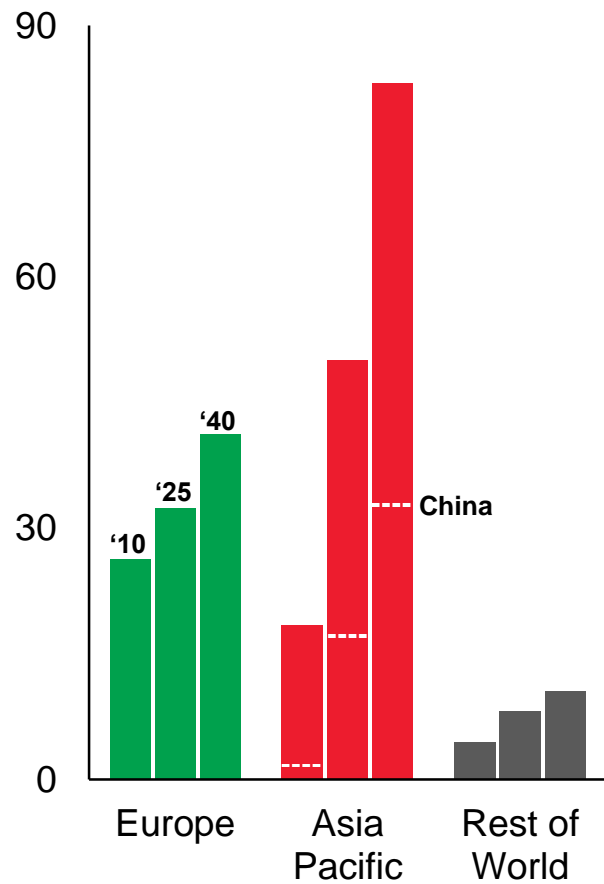
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Gas Trade

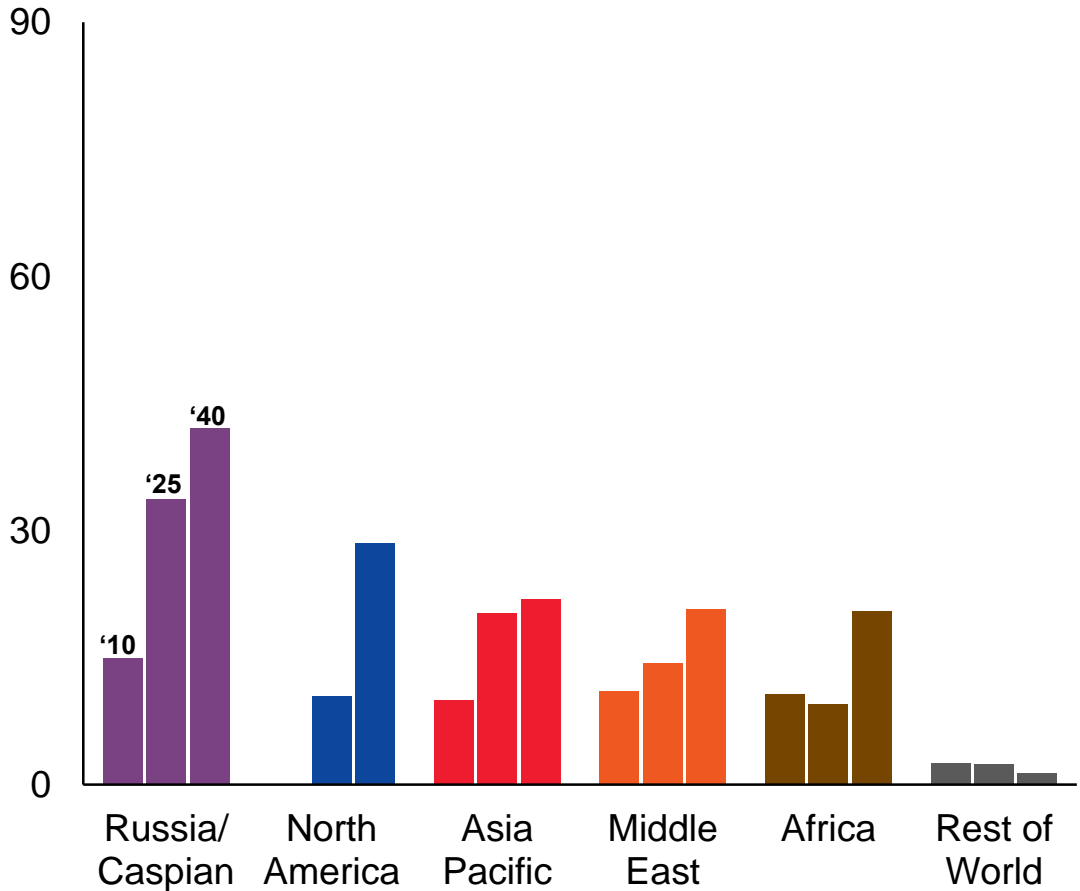
Imports by Region

BCFD



Exports by Region

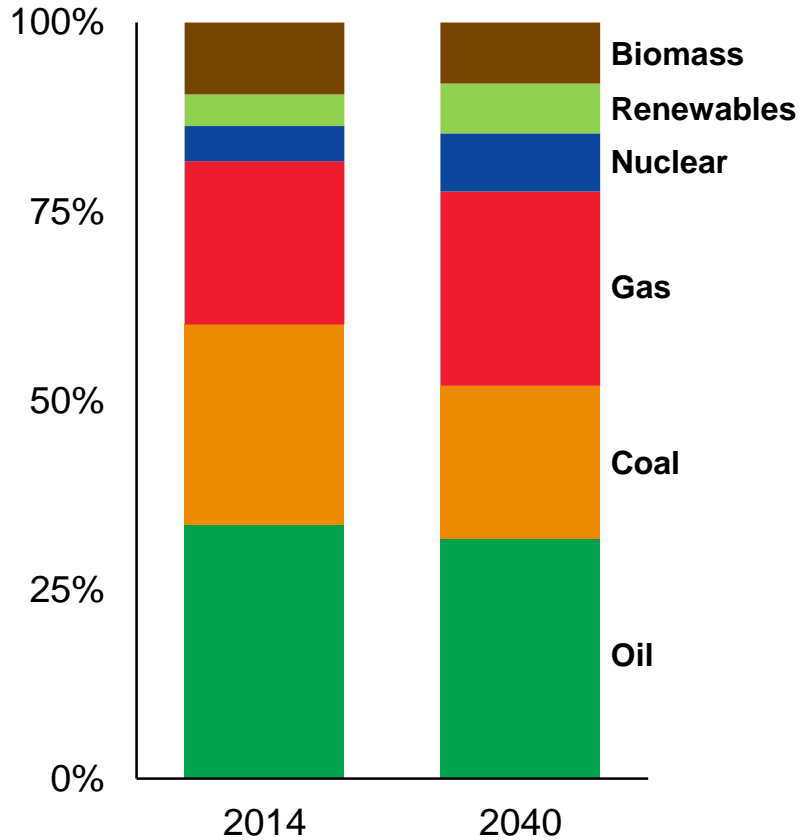
BCFD



Energy Mix Shifts to Lower-Carbon Fuels

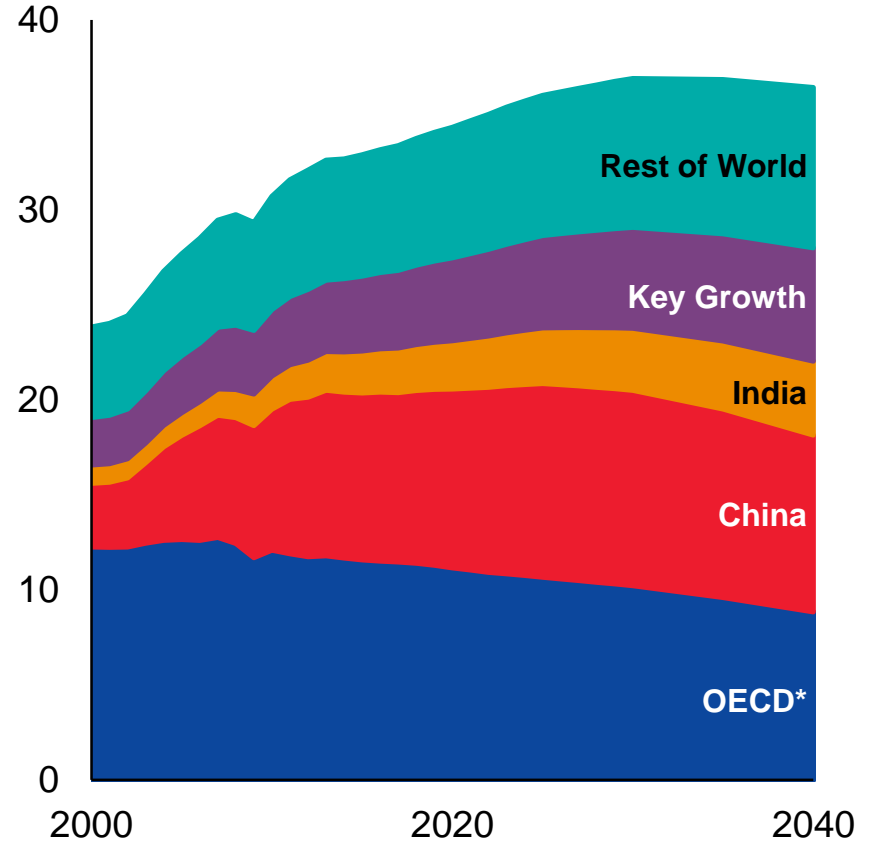
Global Energy Mix

Percent



Energy-Related CO₂ Emissions by Region

Billion Tonnes



*Mexico and Turkey included in Key Growth countries



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