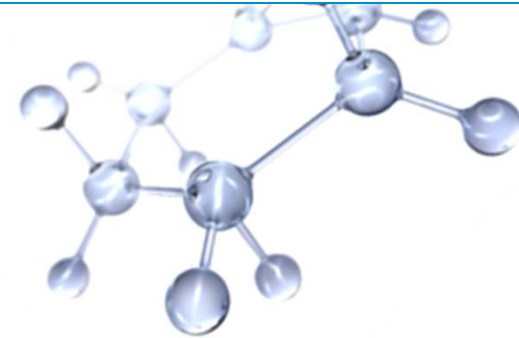


ExxonMobil

Taking on the world's toughest energy challenges.™



The Outlook for Energy a view to 2040

Piero Biscari

Direttore Relazioni Esterne e Istituzionali - Esso Italiana

SAFE

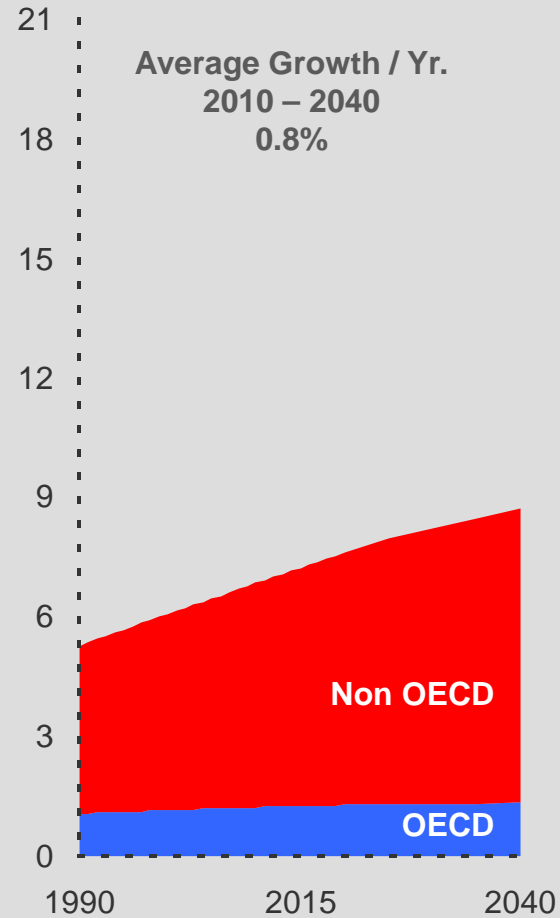
11 maggio 2012

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.

Global Progress Drives Demand

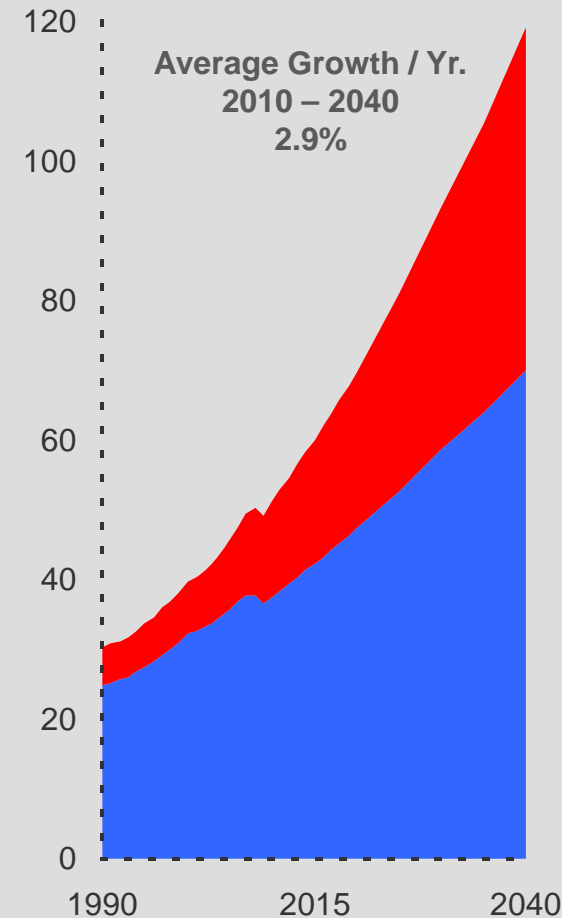
Population

Billion



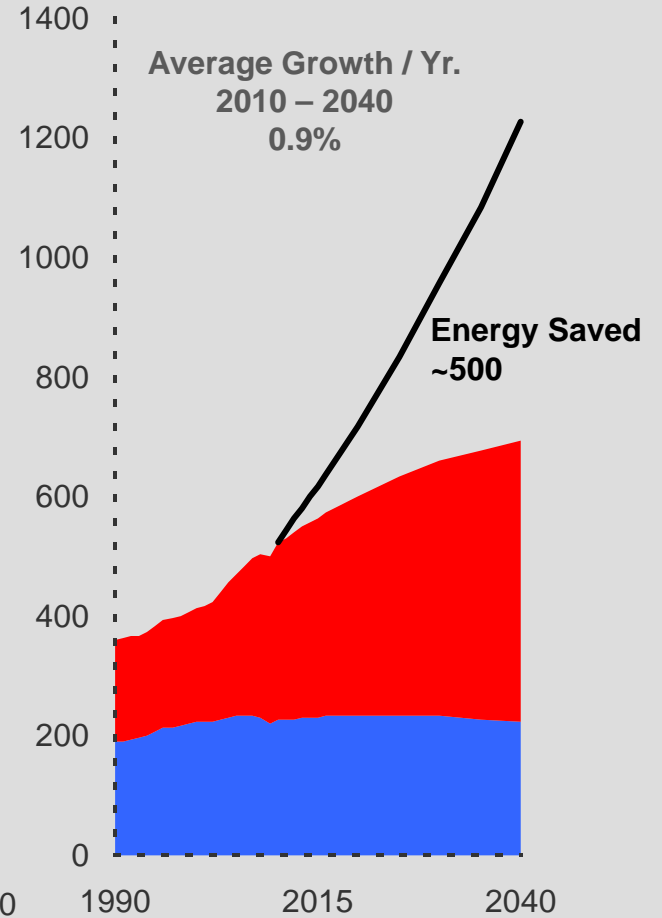
GDP

Trillion 2005\$



Energy Demand

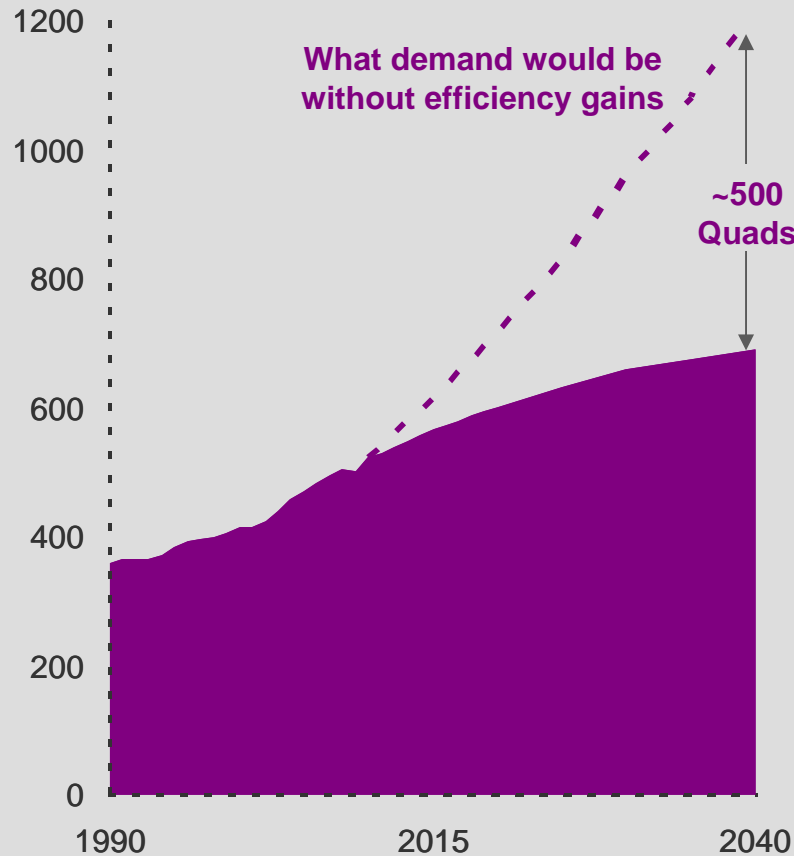
Quadrillion BTUs



Global Efficiency Minimizes Demand Growth

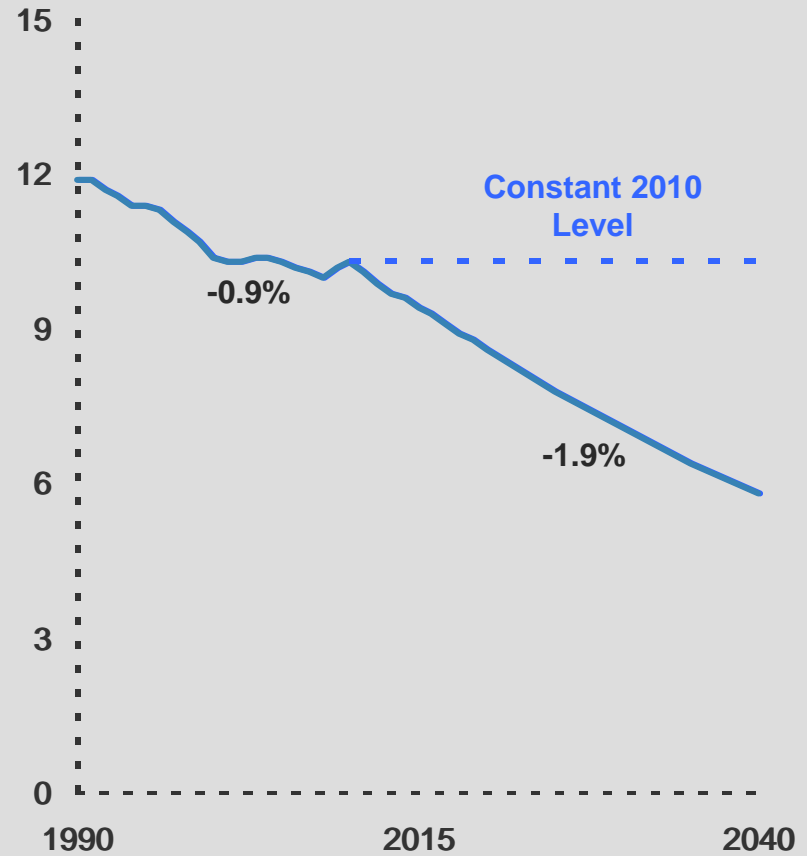
Demand

Quadrillion BTUs



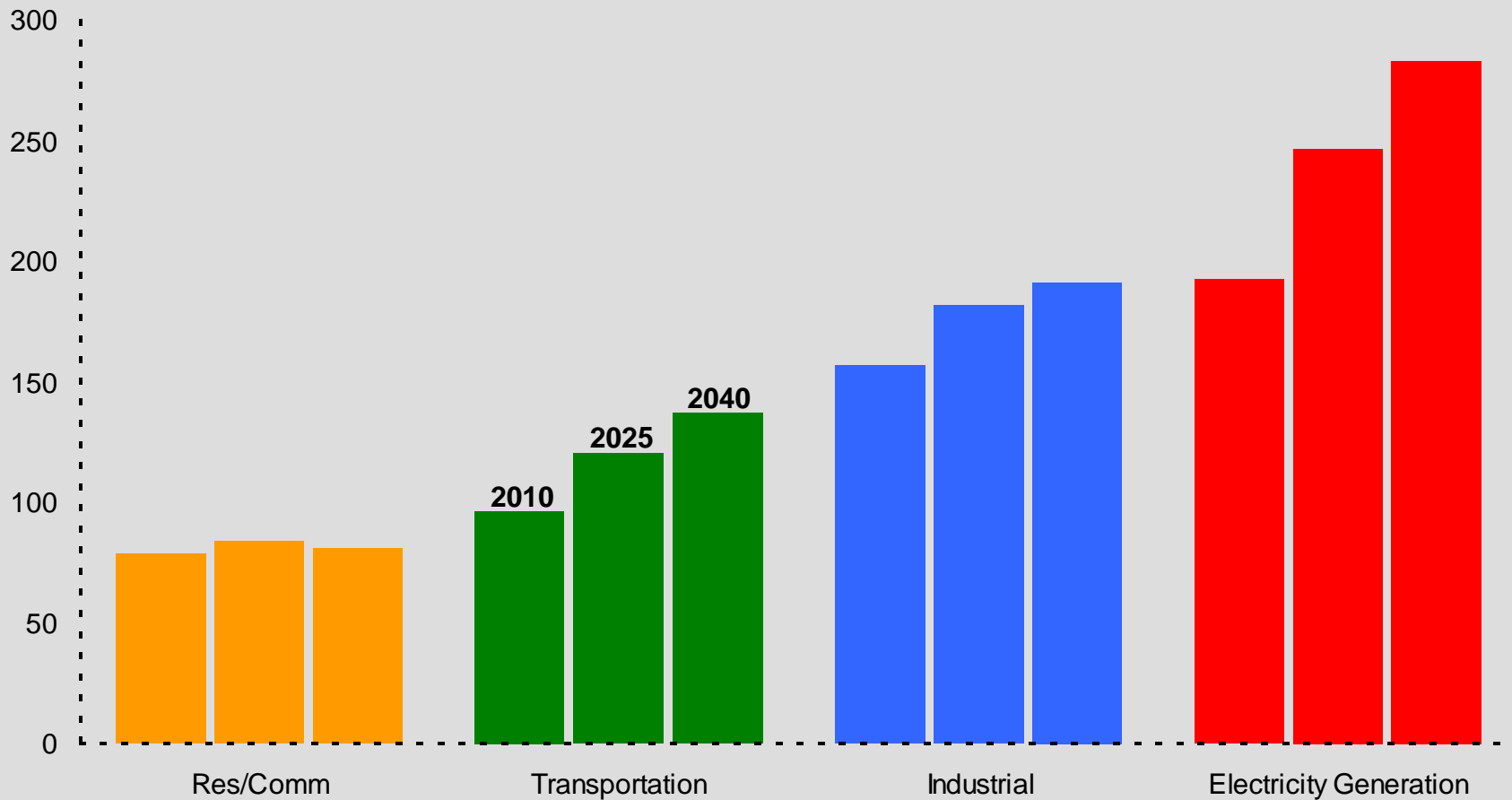
Energy per GDP

MBTU / 2005\$ GDP



Electricity Generation Leads Growth

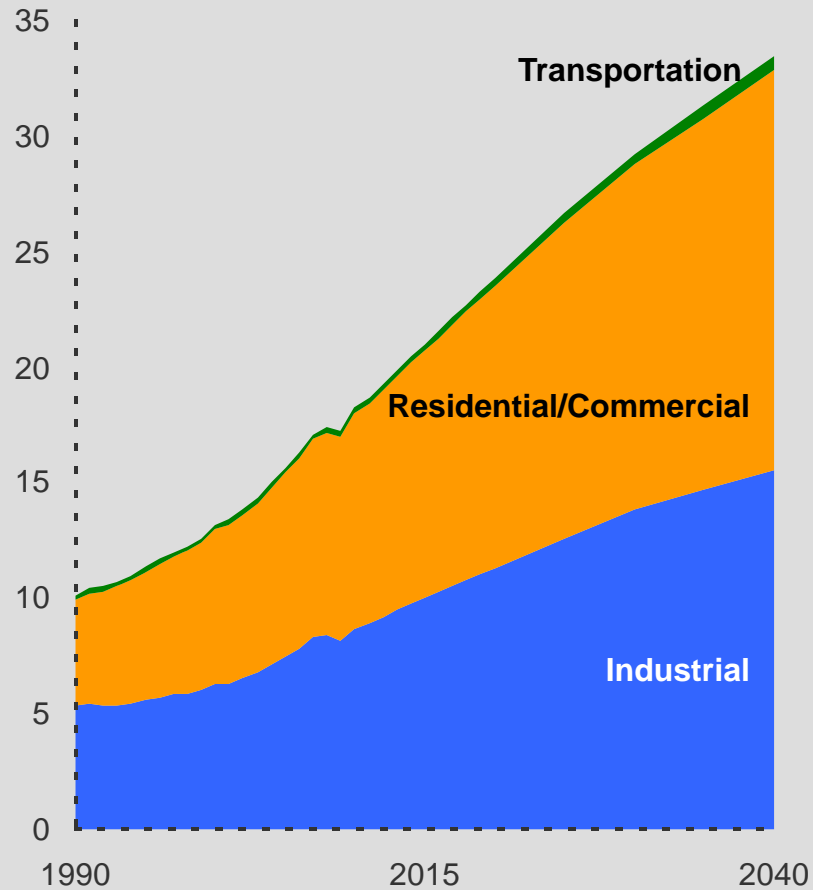
Quadrillion BTUs



Electricity Demand Continues to Surge

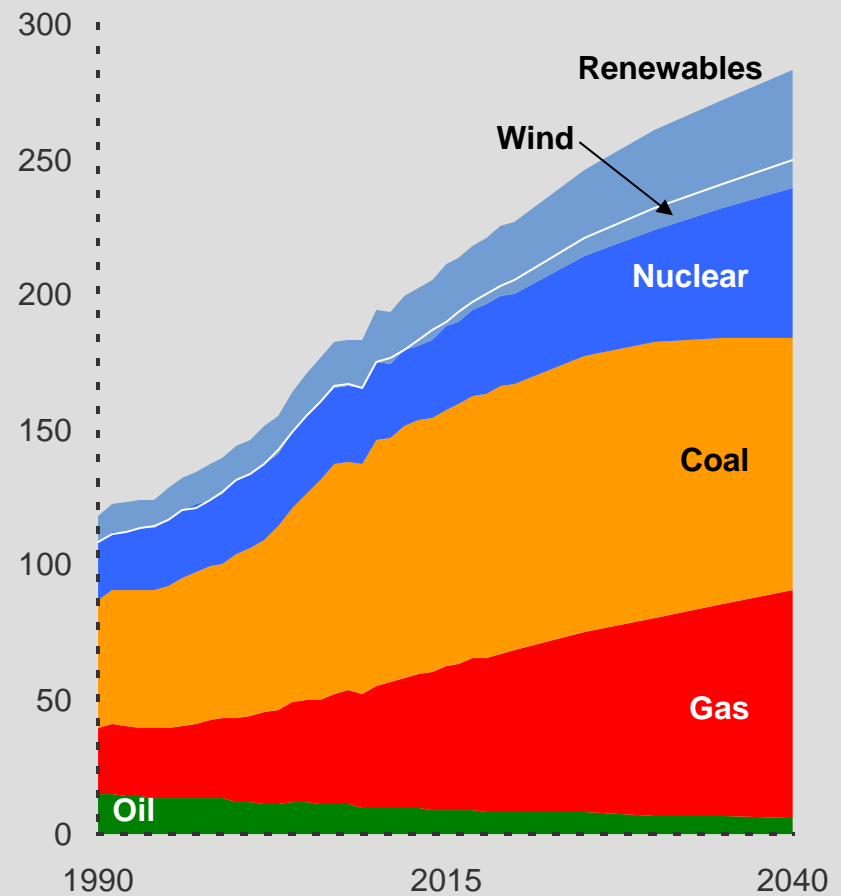
By Sector

k TWh



Fuel Into Electricity Generation

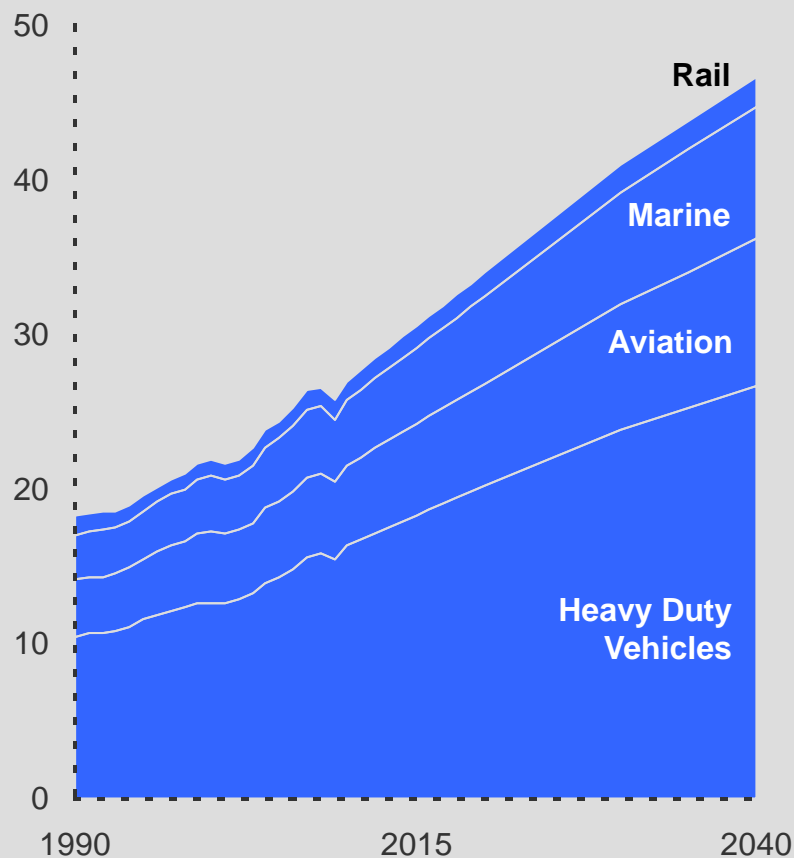
Quadrillion BTUs



Commercial Transportation Drives Demand Growth

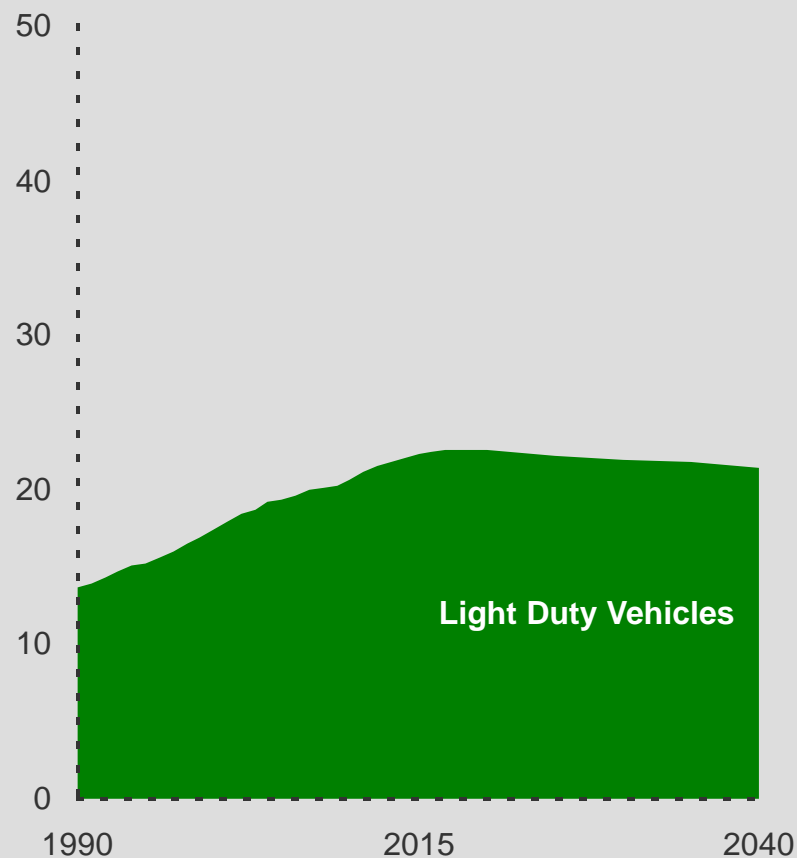
Commercial

MBDOE



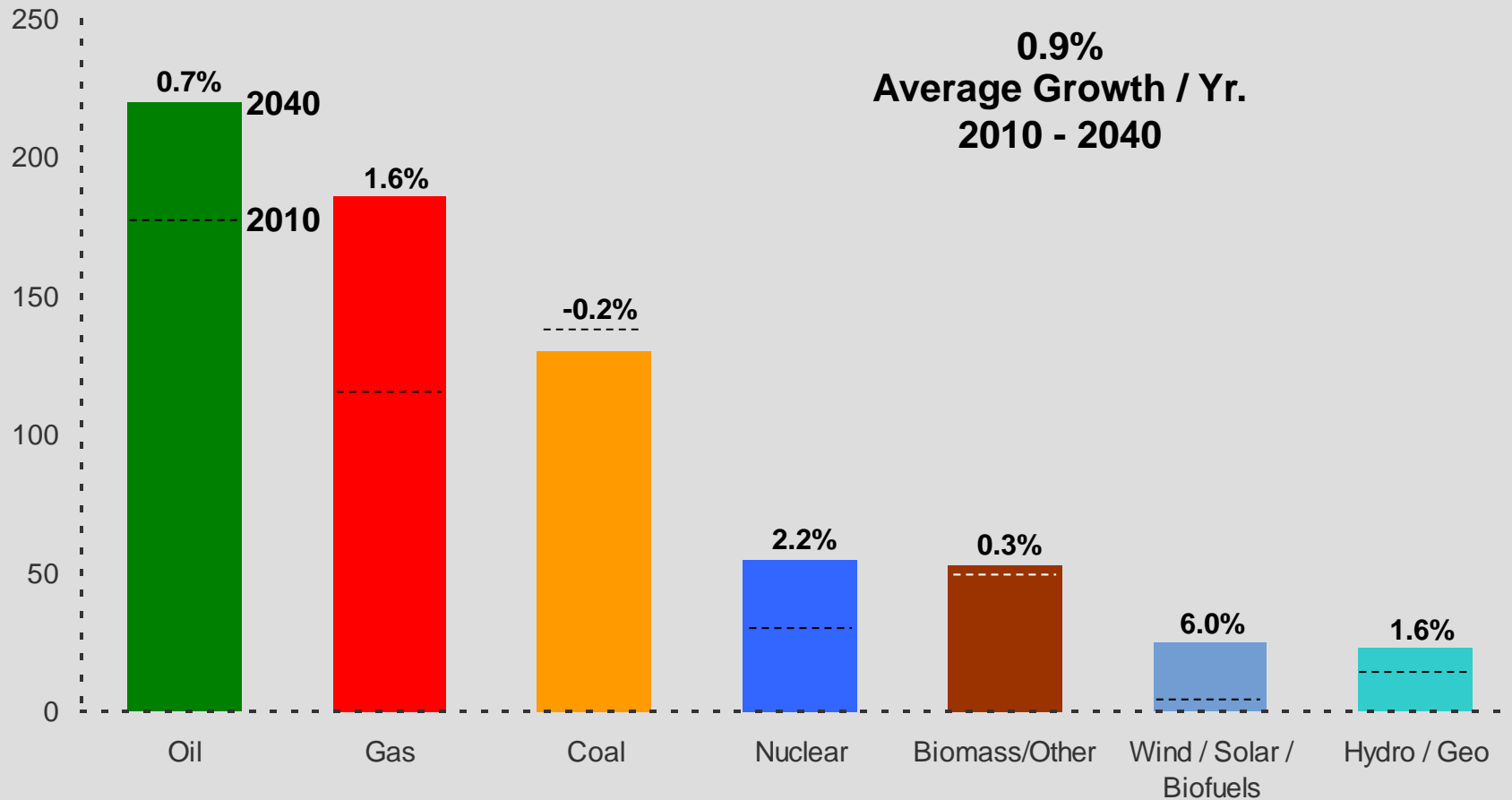
Personal

MBDOE



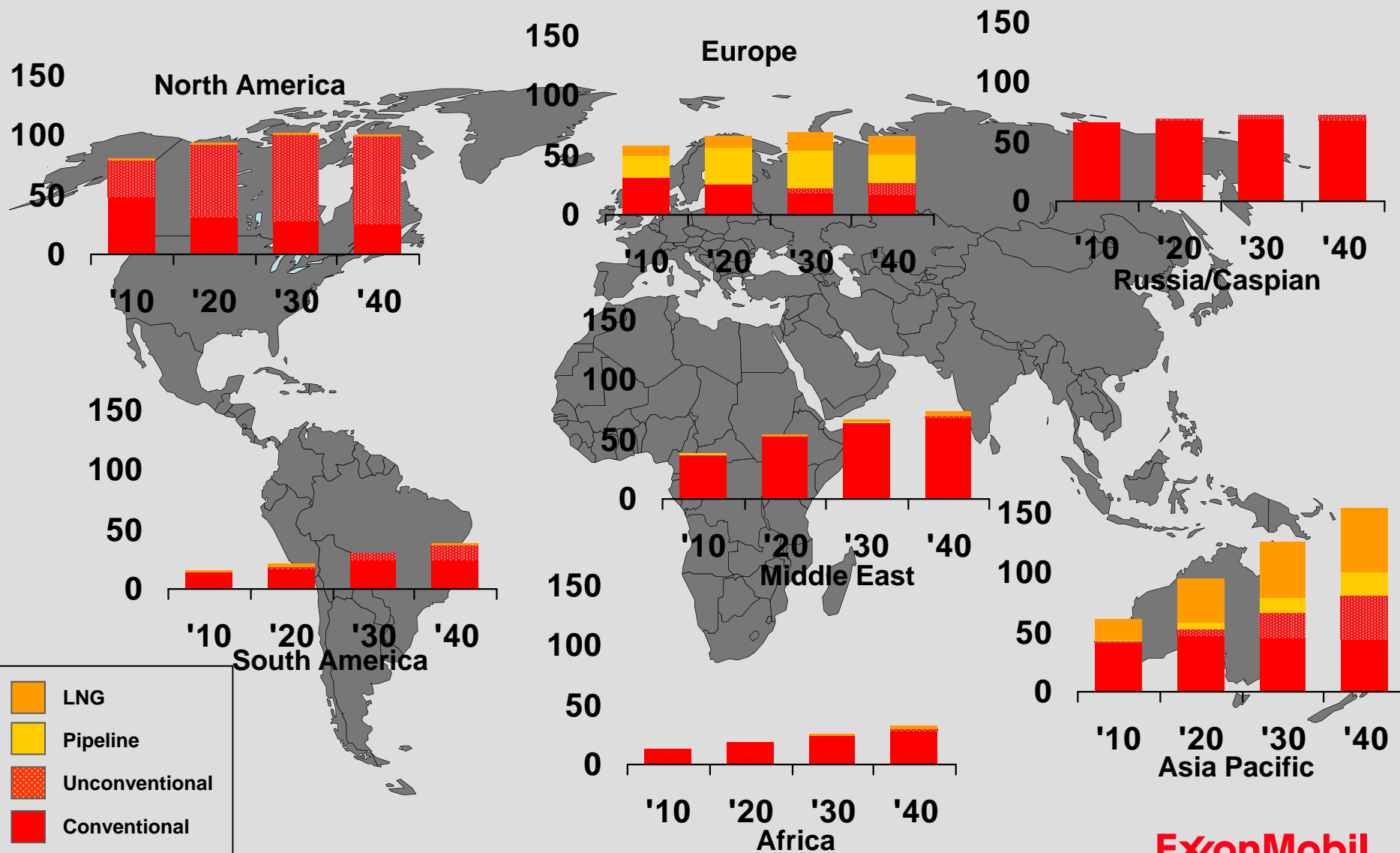
Energy Mix Continues to Evolve

Quadrillion BTUs



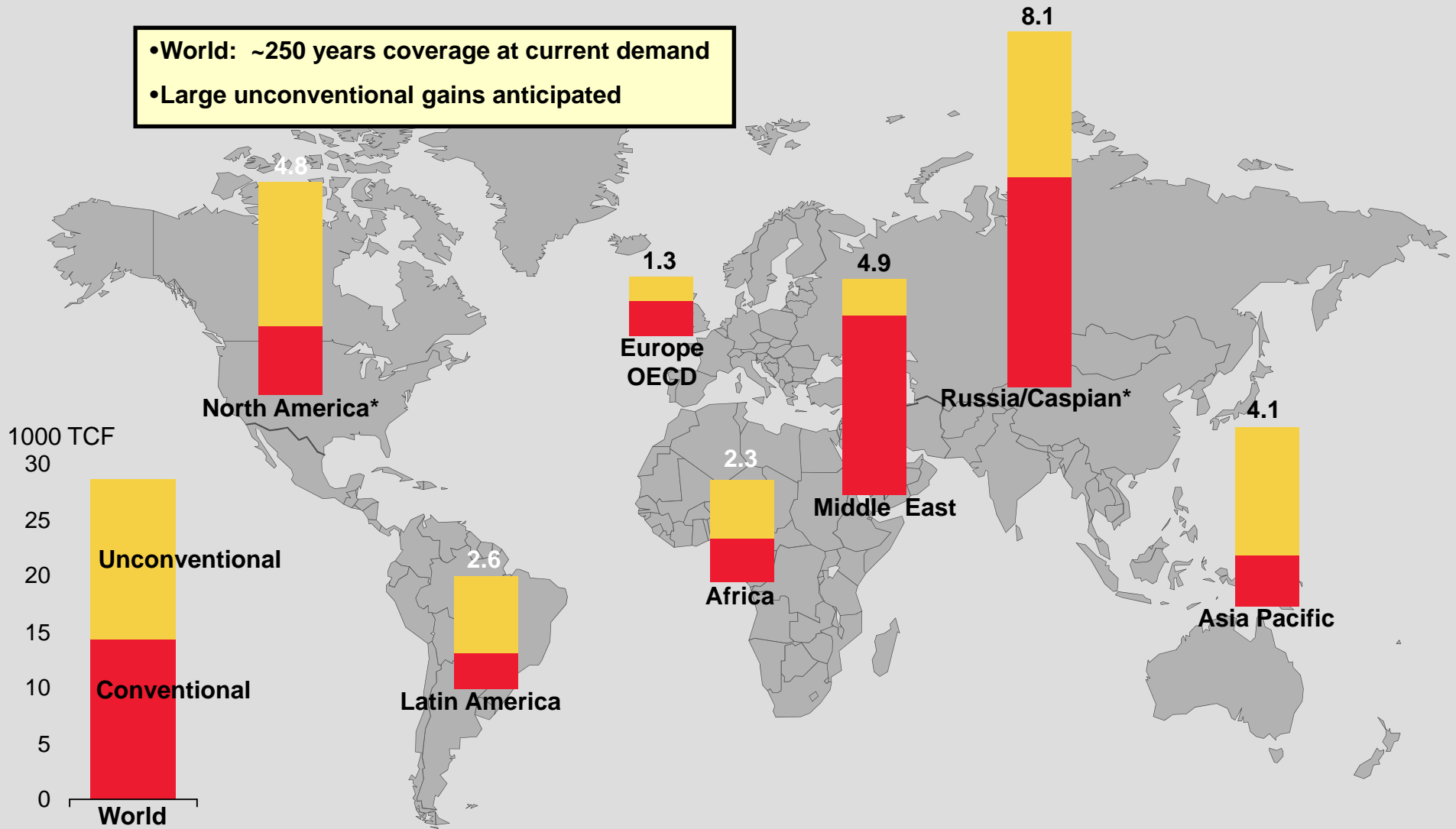
World Gas Supply

BCFD



Global Gas Resource

- World: ~250 years coverage at current demand
- Large unconventional gains anticipated



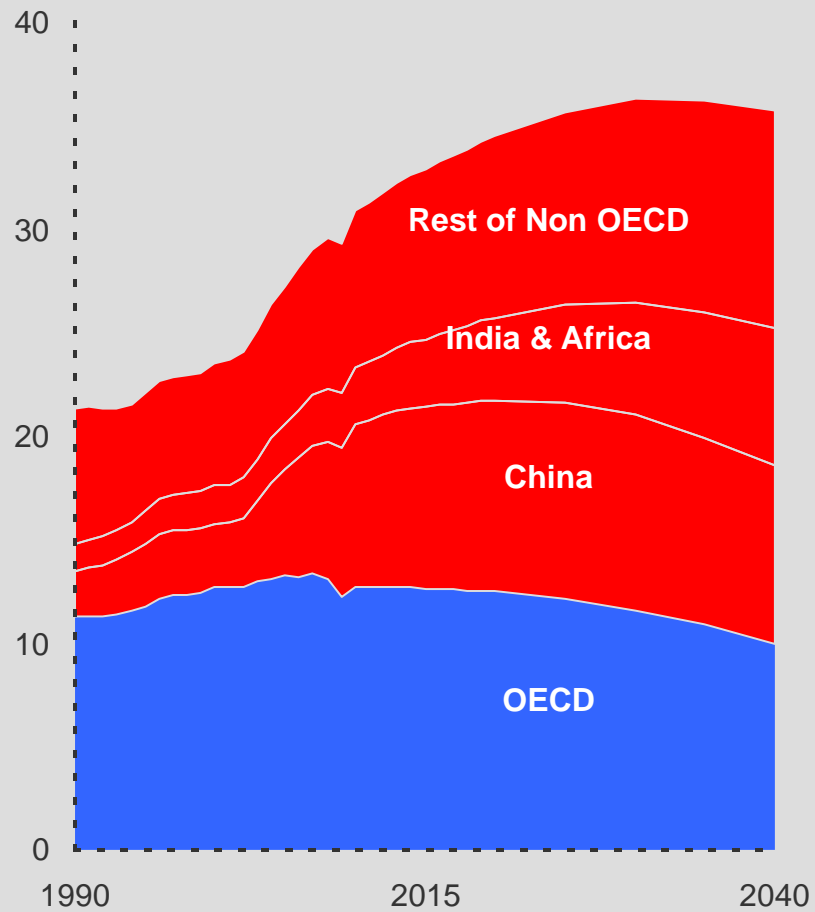
Source: IEA * Includes Europe Non OECD
 ExxonMobil 2012 Outlook for Energy



CO₂ Emissions Plateau

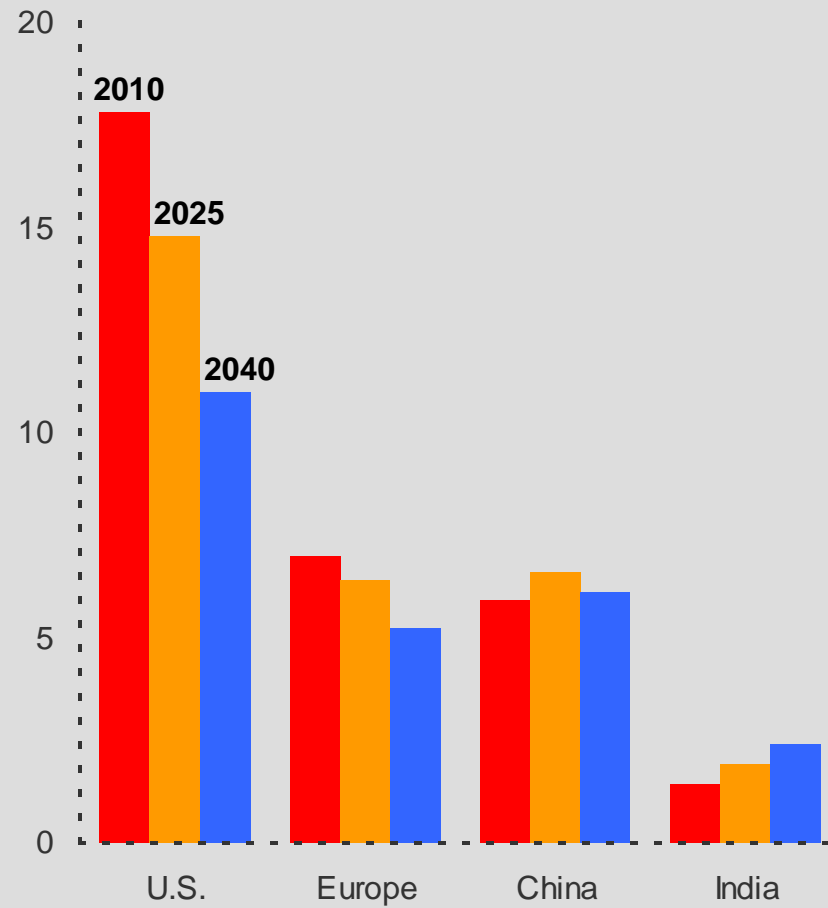
By Region

Billion Tons



Emissions per Capita

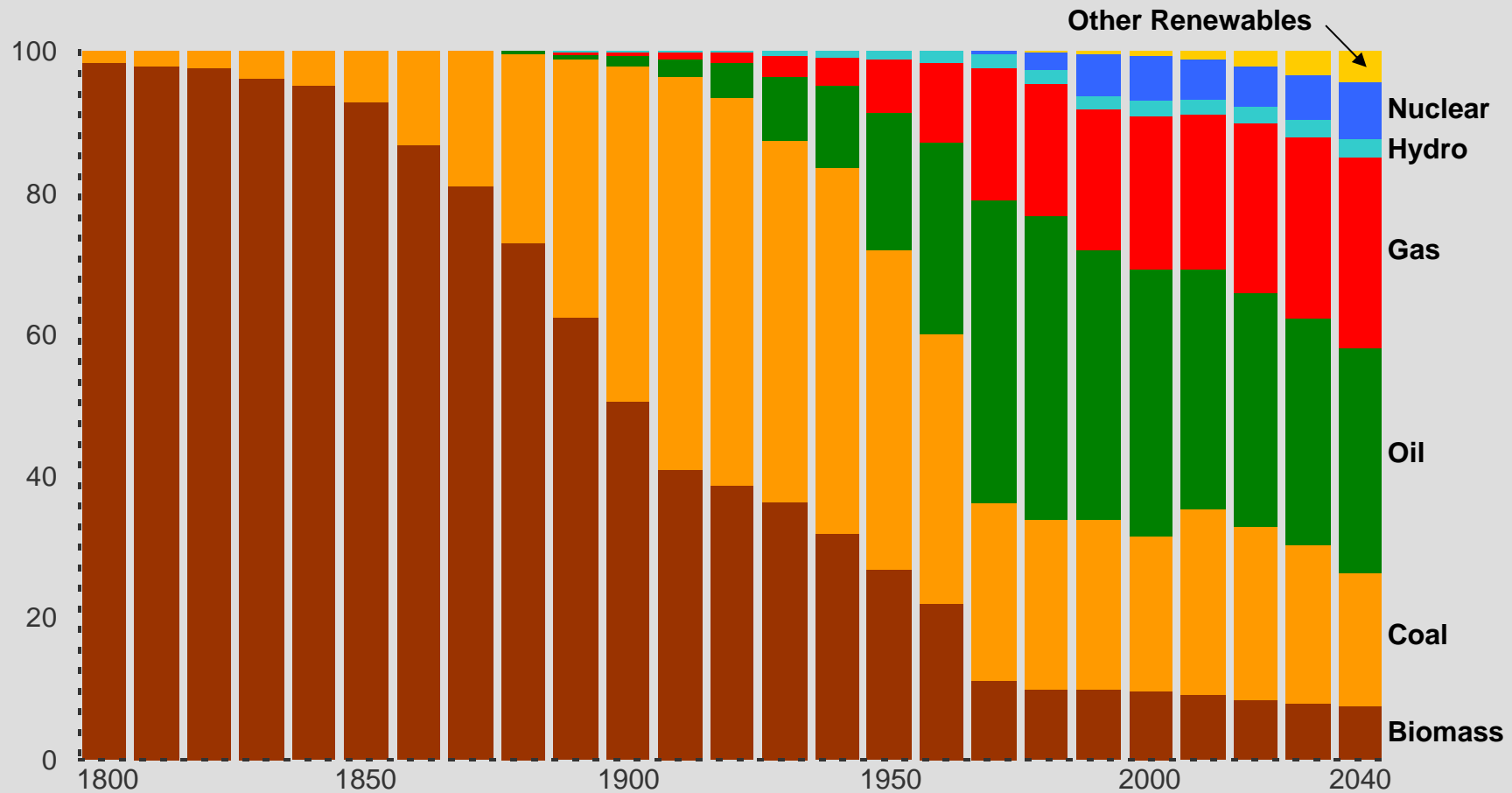
Tons per Person



Energy Use Evolves Over Time

Global Percent Mix of Fuels

Percent



Source: Smil, *Energy Transitions* (1800-1960)

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Development Challenges and Solutions

Increase
Efficiency

World development continues, while lives improve and economies grow



Technology

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