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.
GDP Growth Varies By Region

World GDP by Region
Trillion 2010$

<table>
<thead>
<tr>
<th>Year</th>
<th>OECD</th>
<th>Non OECD</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>45</td>
<td>20</td>
</tr>
<tr>
<td>2025</td>
<td>86</td>
<td>35</td>
</tr>
<tr>
<td>2040</td>
<td>160</td>
<td>73</td>
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</table>

GDP Growth Rate
Y/Y Percent

- **India**: Red line
- **China**: Purple line
- **Key Growth**: Blue line
- **United States**: Green line
- **OECD Europe**: Cyan line

*Turkey included in Key Growth countries*
The Middle Class Continues to Grow

**Middle Class per The Brookings Institution**

Billion People

*Mexico and Turkey included in Key Growth countries*
People’s Living Standards Depend on Energy
Developing Economies Dominate Growth

Demand by Region
Quadrillion BTUs

*Mexico and Turkey included in Key Growth countries
People’s Living Standards Depend on Energy
Global Electricity Generation Mix Evolves

Global Capacity Utilized (GW)

- Nuclear
- Wind
- Solar

By Generation (k TWh)

- Gas
- Coal
- Nuclear
- Wind & Solar
- Other Renewables
- Oil

ExxonMobil 2015 Outlook for Energy
People’s Living Standards Depend on Energy
China’s Urban Households Have Modernized Rapidly

China’s Urban Appliance Ownership
Appliances per 100 Households

- Color TV
- Air Conditioner
- Washing Machine
- Refrigerator
- Water Heater
- Computer

Demand By Fuel
Quadrillion BTUs

Source: China Statistical Yearbook
Transportation
Advanced Powertrains and Alternative Fuels

- Gasoline
- Spark Ignition ICE

- Diesel
- Compression Ignition ICE

- Ethanol
- Stop-Start Hybrid

- Biodiesel
- Full Hybrid

- CNG
- Plug-in Hybrid

- LNG

- Electricity
- Battery Electric Vehicle

- Hydrogen
- Fuel Cell Vehicle

ExxonMobil 2015 Outlook for Energy
Light Duty Vehicle Fleet Grows, Mix Changes

Powertrain Technology
Million Vehicles

2040

- Elec/Plug-in/Fuel Cell
- Full Hybrid
- Natural Gas & LPG
- Diesel
- Gasoline

North America | Europe | China | India | Other AP | Middle East | Latin America | Rest of World
---|---|---|---|---|---|---|---
0 | 0 | 0 | 0 | 0 | 0 | 0 | 0
100 | 100 | 100 | 100 | 100 | 100 | 100 | 100
200 | 200 | 200 | 200 | 200 | 200 | 200 | 200
300 | 300 | 300 | 300 | 300 | 300 | 300 | 300
400 | 400 | 400 | 400 | 400 | 400 | 400 | 400
500 | 500 | 500 | 500 | 500 | 500 | 500 | 500

ExxonMobil 2015 Outlook for Energy
CO$_2$ Emissions
World Emissions

CO₂ Emissions by Region
Billion metric tonnes

Emissions per Capita
Tonnes / Person

*Mexico and Turkey included in Key Growth countries
Supply
Highest Texas Production Since 1980’s

Texas Field Production of Crude Oil

KBD

Source: U.S. Energy Information Administration; 2014 through Aug
Liquids Trade Balance by Region

MBDOE

- Biofuels
- Other
- Natural Gas Liquids
- Tight Oil
- Oil Sands
- Deepwater
- Conventional C&C Development
- Conventional Crude & Condensate
- Demand

North America
Latin America
Africa
Europe
Russia/Caspian
Middle East
Asia Pacific
Pennsylvania’s 20x Increase

Pennsylvania Natural Gas Production

BCFD

<table>
<thead>
<tr>
<th>Year</th>
<th>Unconventional</th>
<th>Conventional</th>
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</thead>
<tbody>
<tr>
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</tr>
<tr>
<td>2014</td>
<td></td>
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</tr>
</tbody>
</table>

Source: Pennsylvania Department of Environmental Protection
Gas Trade Balance by Region

North America

Latin America

Africa

Europe

Russia/Caspian

Middle East

Asia Pacific

BCFD

Unconventional Production

Conventional Production

Demand
For more information, visit exxonmobil.com/energyoutlook

or download the ExxonMobil app
North America Gas Production

BCFD

Unconventional

Conventional

2000  2020  2040
LNG Exports Triple and Inter-regional PL Exports Double

**Gas Supply**

- LNG
- Pipeline
- Local Unconventional
- Local Conventional

**LNG Exports by Basin**

<table>
<thead>
<tr>
<th>Year</th>
<th>ME</th>
<th>Atlantic</th>
<th>Pacific</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>'10 - '25</td>
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<td>'25 - '40</td>
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<td></td>
</tr>
<tr>
<td>2040</td>
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</table>

**Inter-regional Pipeline Exports**

<table>
<thead>
<tr>
<th>Year</th>
<th>BCFD</th>
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<tbody>
<tr>
<td>2010</td>
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<td>'10 - '25</td>
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<td>'25 - '40</td>
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</tr>
<tr>
<td>2040</td>
<td></td>
</tr>
</tbody>
</table>

ExxonMobil 2015 Outlook for Energy
Light Duty Vehicle Fleet and Demand

**2040 LDV Fleet**

<table>
<thead>
<tr>
<th>Country</th>
<th>Improved Standard of Living</th>
<th>Population Growth</th>
<th>Base Fleet</th>
</tr>
</thead>
<tbody>
<tr>
<td>OECD*</td>
<td>700</td>
<td>500</td>
<td>500</td>
</tr>
<tr>
<td>China</td>
<td>300</td>
<td>200</td>
<td>300</td>
</tr>
<tr>
<td>India</td>
<td>200</td>
<td>150</td>
<td>200</td>
</tr>
<tr>
<td>Key Growth</td>
<td>100</td>
<td>75</td>
<td>100</td>
</tr>
<tr>
<td>ROW</td>
<td>50</td>
<td>37</td>
<td>50</td>
</tr>
</tbody>
</table>

*Mexico and Turkey included in Key Growth countries

**World LDV Demand**

- **Energy Savings**
- **Improved Standard of Living**
- **Population Growth**

*ExxonMobil 2015 Outlook for Energy*
Electricity Demand

Electricity Demand
Thousand TWh

Electricity Demand by Region
Thousand TWh

ExxonMobil 2015 Outlook for Energy
Economic Choices for U.S. Electricity

2030 Levelized Cost of Electricity
2014 U.S. cents/kWh

- Gas
- Gas CCS
- Coal
- Coal CCS
- Nuclear
- Onshore Wind
- Solar PV Utility

CO₂ Cost: $60/tonne

Unable to meet NSPS

Reliability Cost*

*Reliability cost includes integration, backup capacity and additional transmission costs.
Wind and Solar Demand

Global Wind and Solar Capacity
Gigawatts

- Onshore Wind
- Offshore Wind
- Solar

Electricity Share Delivered by Wind and Solar
Percent

- European Union
- United States
- China
- India

ExxonMobil 2015 Outlook for Energy
Light Duty Vehicle Efficiency

Fleet by Type
Million

- Electrified/Plug-in/Fuel Cell
- Full Hybrid
- Natural Gas & LPG
- Diesel
- Gasoline

Range of Average Vehicle Efficiency
On-Road Miles per Gallon

- Europe
- U.S.
- Average Fleet

ExxonMobil 2015 Outlook for Energy
Transportation Fuel Demand

World MBDOE

- Natural Gas
- Fuel Oil
- Jet Fuel
- Biodiesel
- Diesel
- Ethanol
- Gasoline
- Other

United States MBDOE

- Natural Gas
- Fuel Oil
- Jet Fuel
- Biodiesel
- Diesel
- Ethanol
- Gasoline
- Other

ExxonMobil 2015 Outlook for Energy
U.S. Energy Trends

Indexed to 2000

- GDP
- Population
- Demand
- Carbon Emissions
Electricity Generation Fuel by Region

Quadrillion BTUs

OECD*

China

India

Key Growth

ROW

*Mexico and Turkey included in Key Growth countries
Energy Trade

Liquids Demand
MBDOE

Gas Demand
BCFD

Imports/Exports
Local Production

LNG
Pipeline
Local Production