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Taking on the world's toughest energy challenges.™

The Outlook for Energy: A View to 2030

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ExxonMobil Refining & Supply**

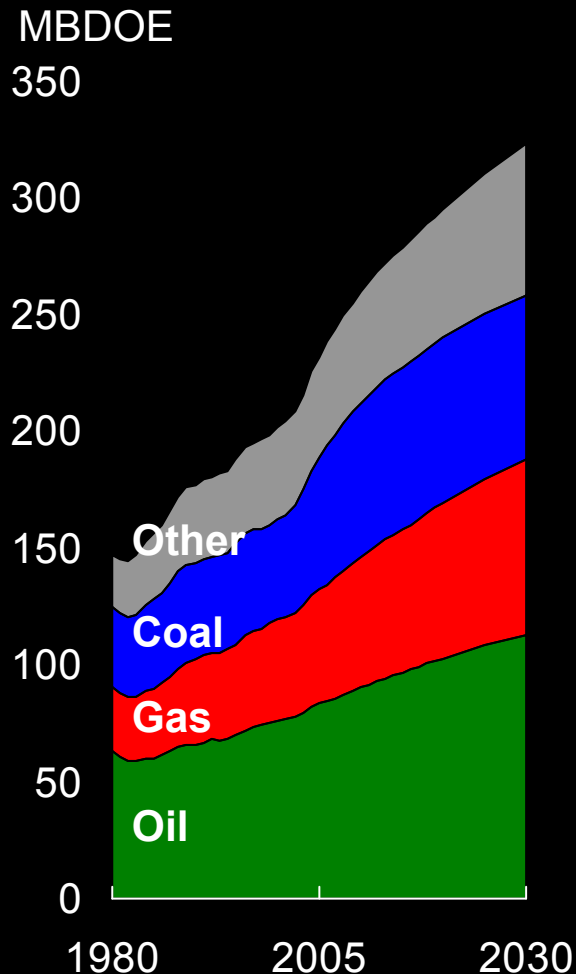
**Diesel Engine-Efficiency and
Emissions Research (DEER)
2008 Conference
Dearborn, Michigan
August 4, 2008**



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 in 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.

Energy Outlook Basis

Energy Supply/Demand



- **Energy Demand Outlook**

- Detailed buildup by country and end-use sector
- Links energy use to economic drivers
- Incorporates efficiency improvements
- Considers trends, economics, and supply by fuel type
- Reflects assessment of potential policy initiatives

- **Oil & Gas Supply Outlook**

- Incorporates ultimate recoverable resource estimates
- Models production profiles for all countries or regions
- Considers economics and ongoing advances in technology

Global Economics and Energy

GDP

Trillion 2005\$

Average Growth / Yr.

100 1980 – 2005 2005 – 2030
2.9% 3.0%

75

50

25

0

1980

2005

2030



Energy Intensity

BOE/2005\$K GDP

3

-1.0%

-1.6%

2

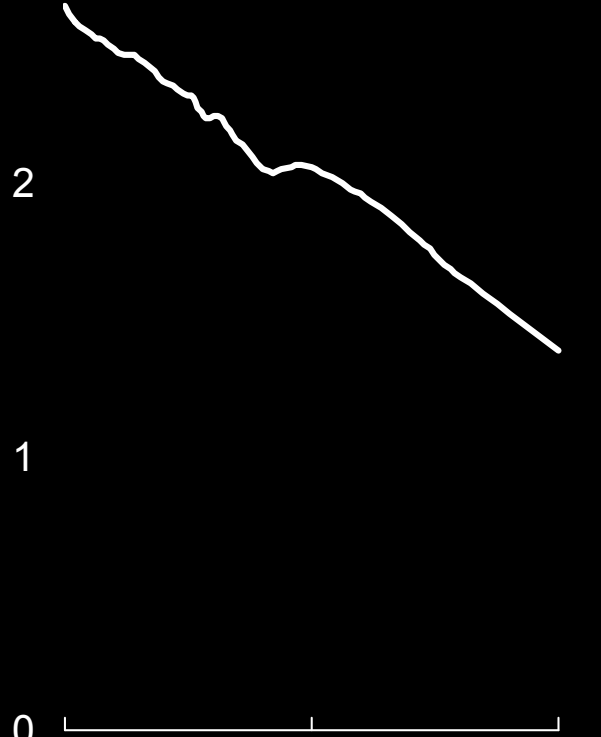
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0

1980

2005

2030



Energy Demand

MBDOE

350

1.8%

1.3%

300

250

200

150

100

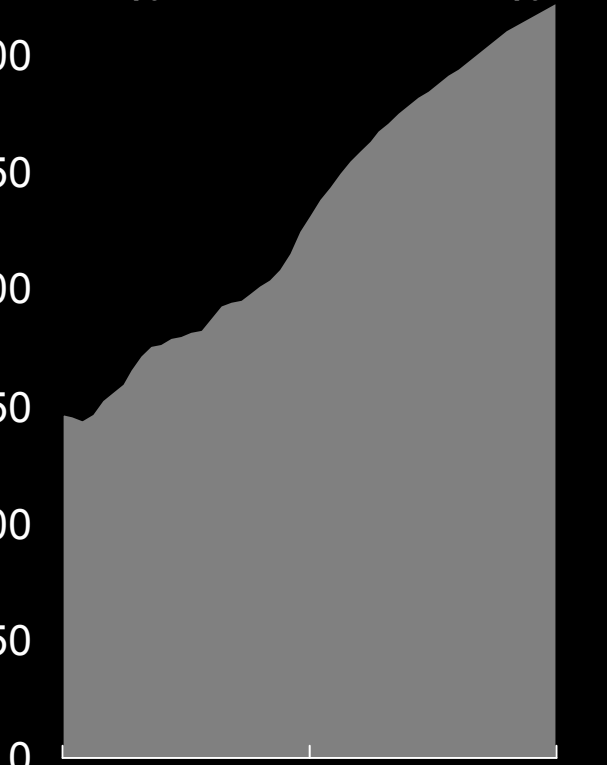
50

0

1980

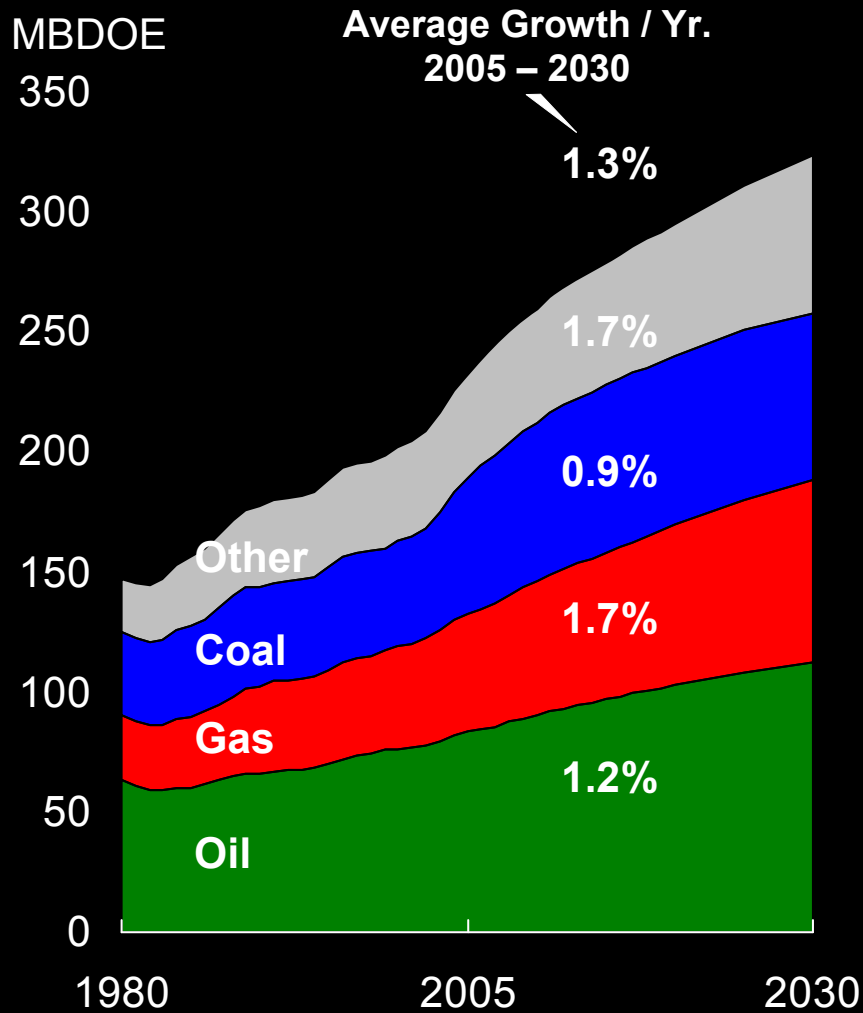
2005

2030

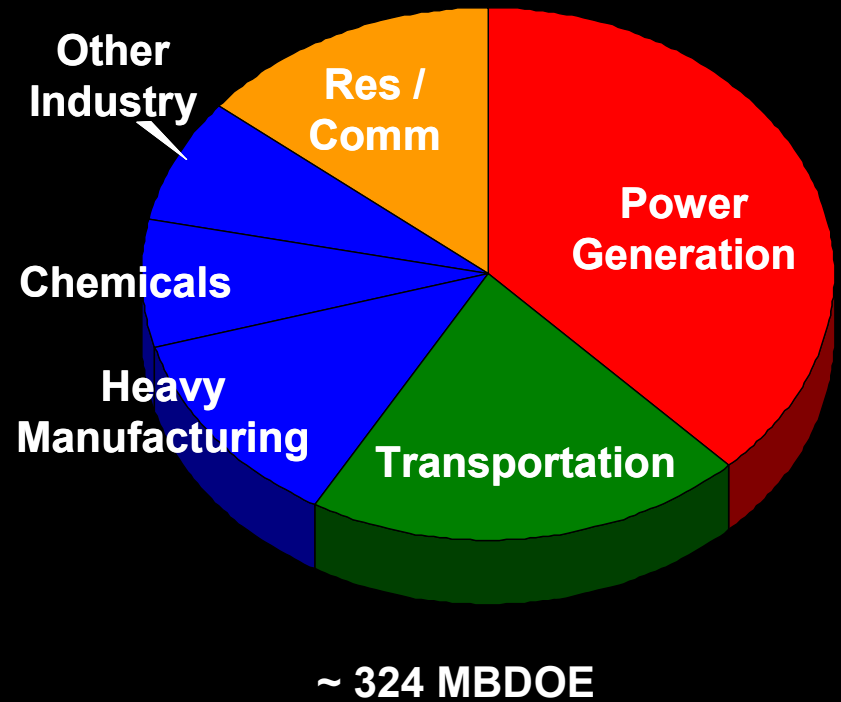


World Energy Demand

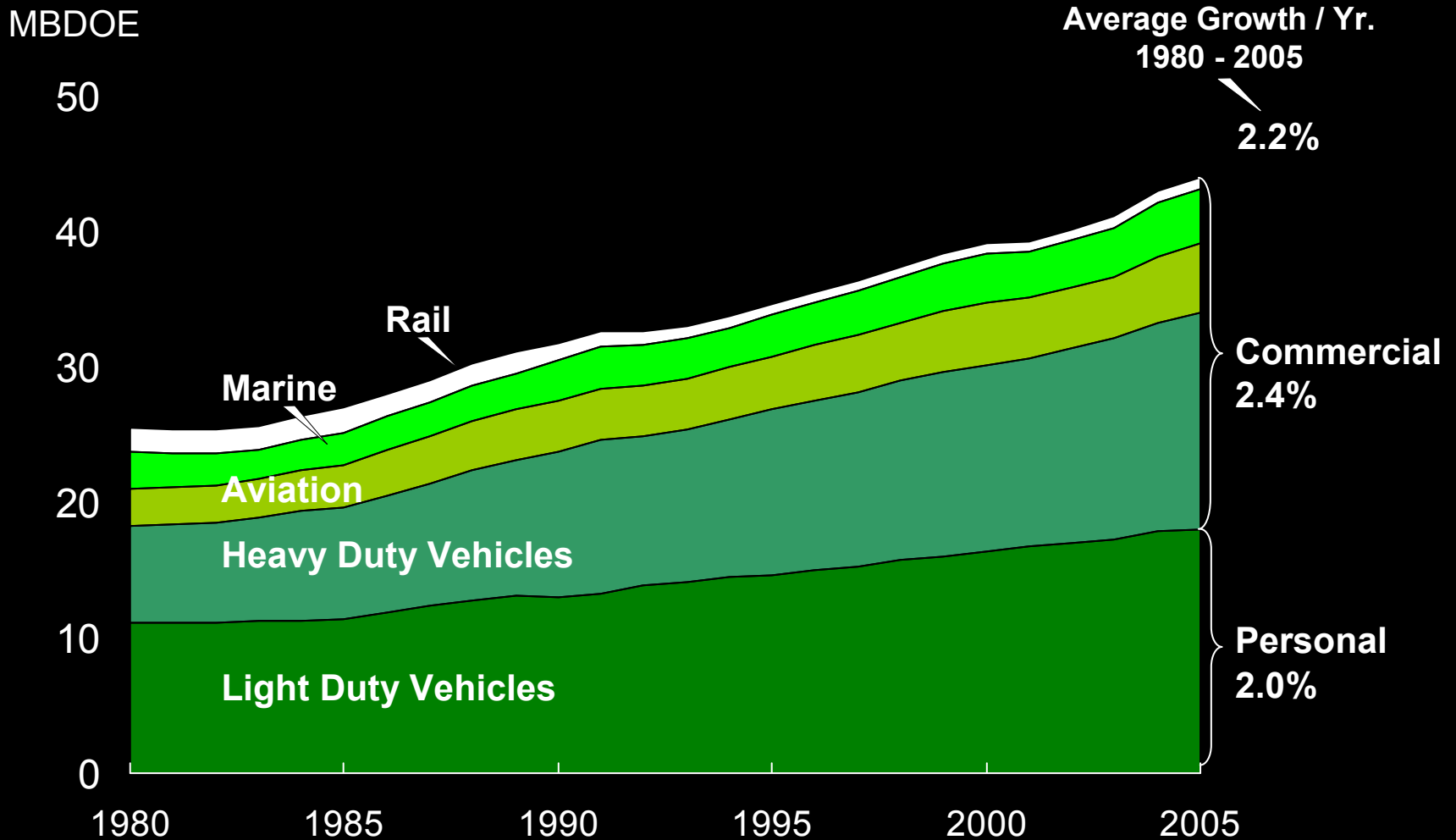
By Fuel



By Sector - 2030

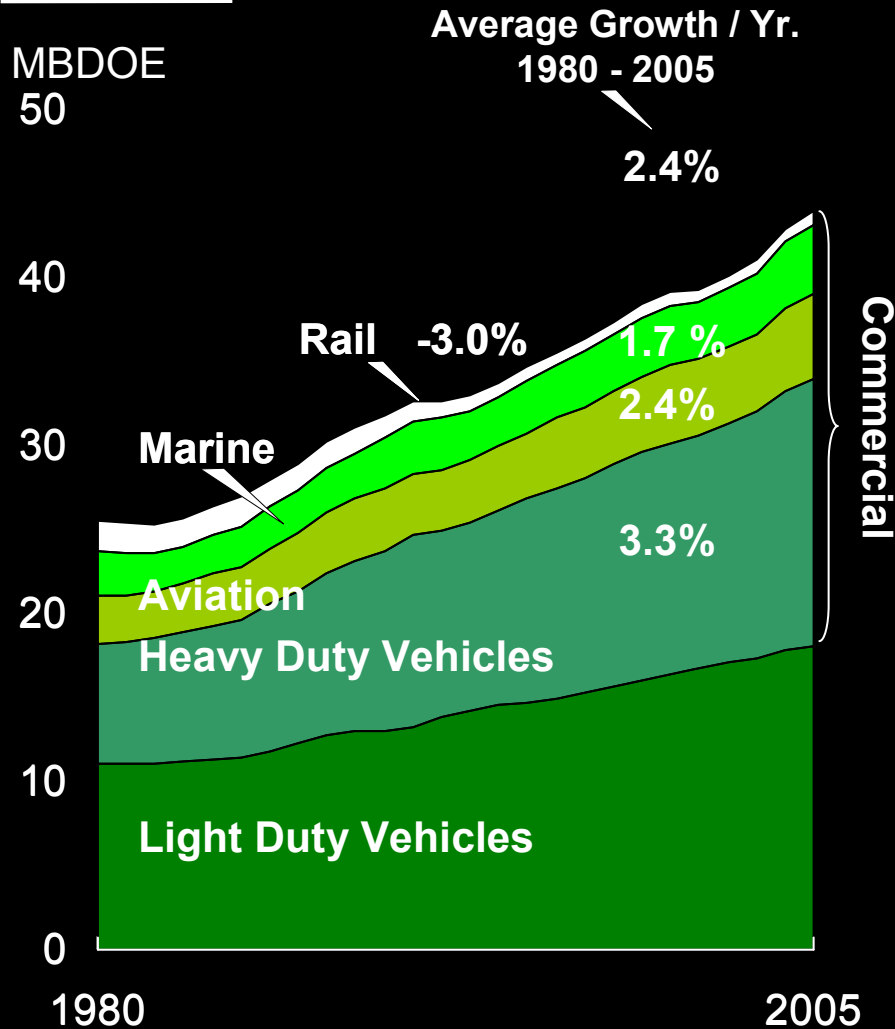


Global Transportation Demand

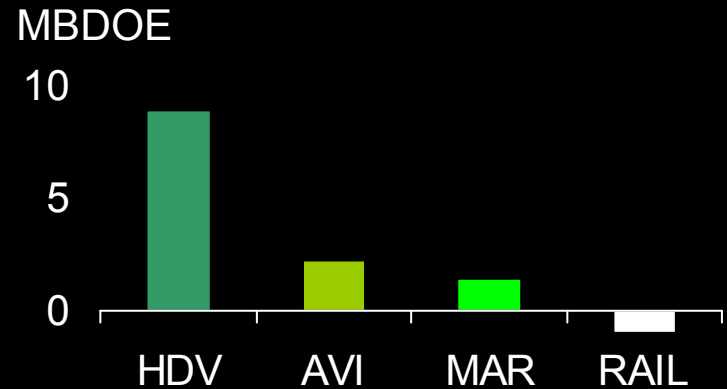


Global Commercial Transportation

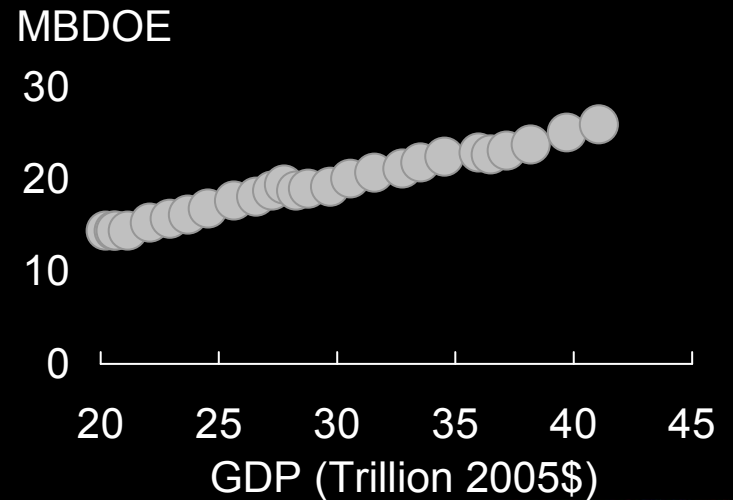
By Sector



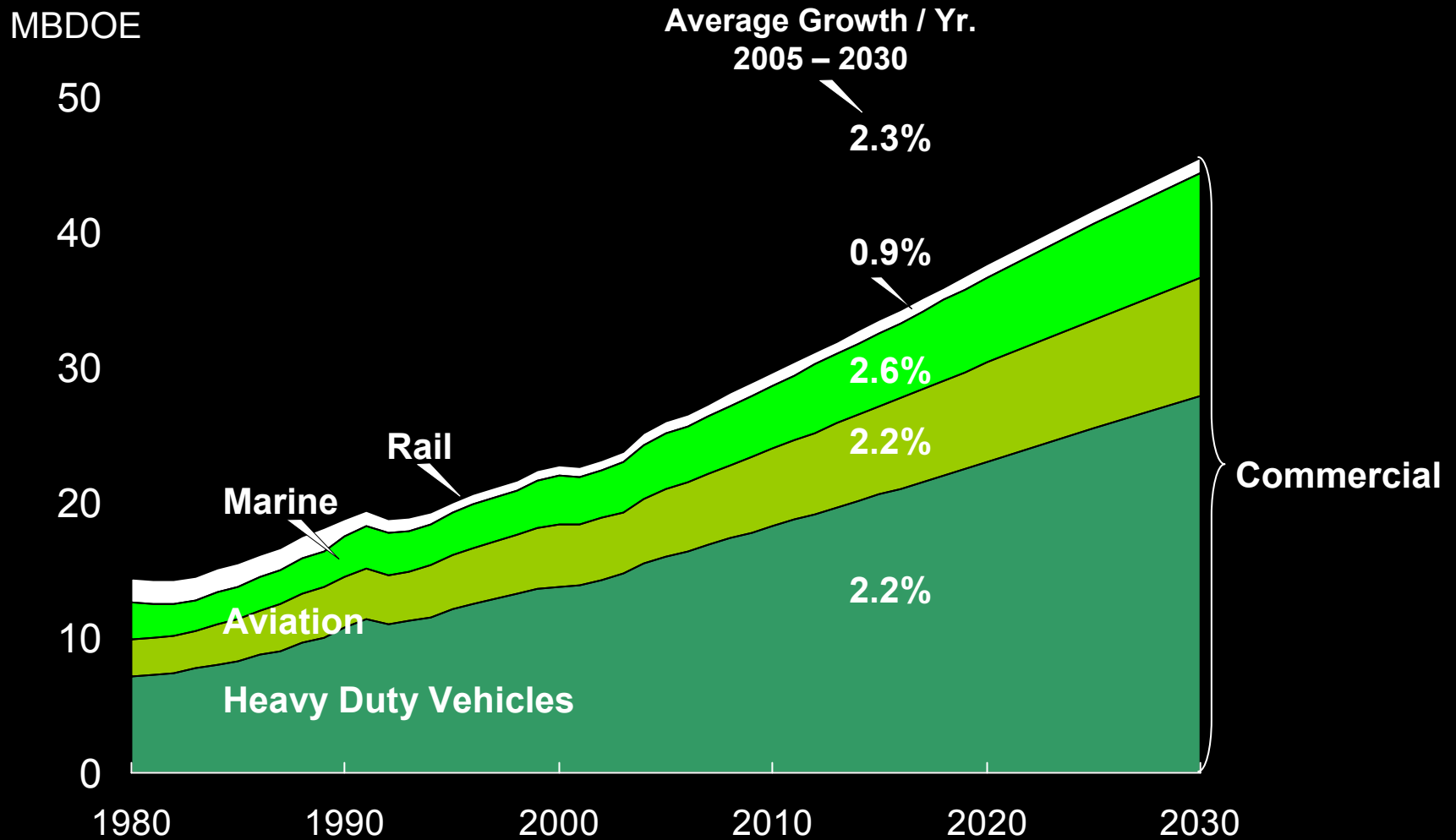
Growth 1980 - 2005



Demand versus GDP

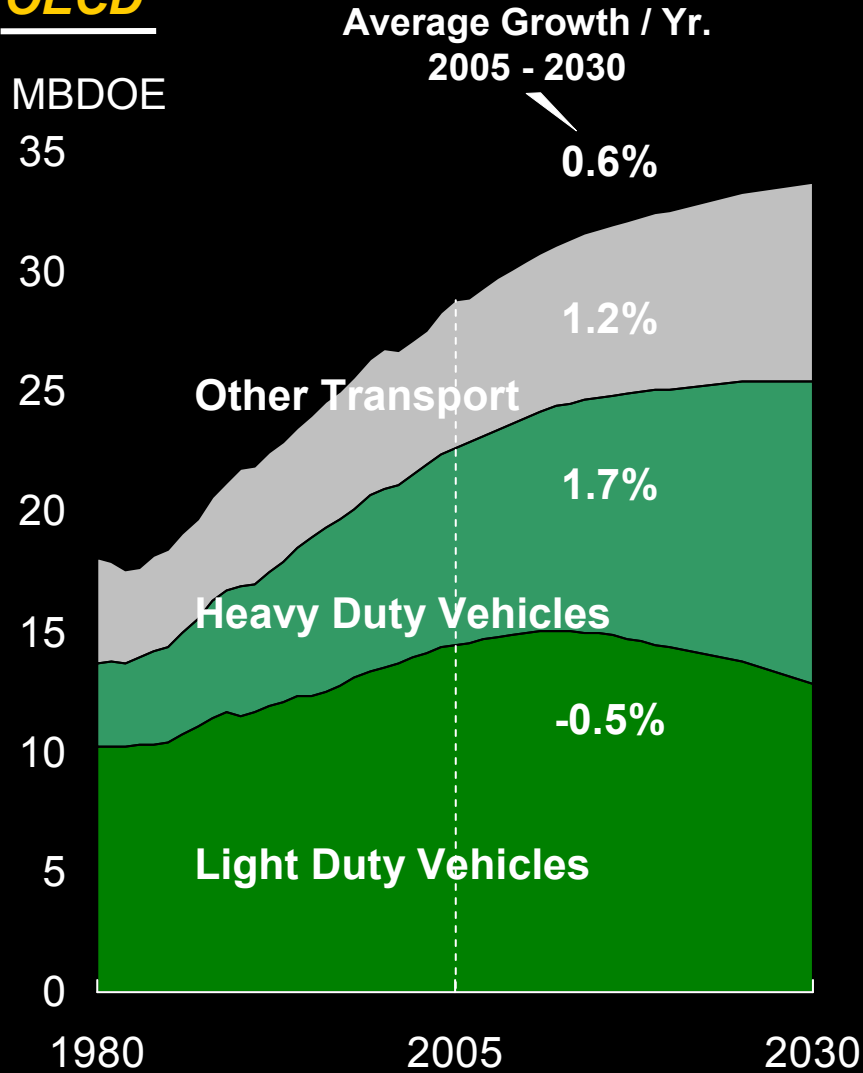


Global Commercial Transportation

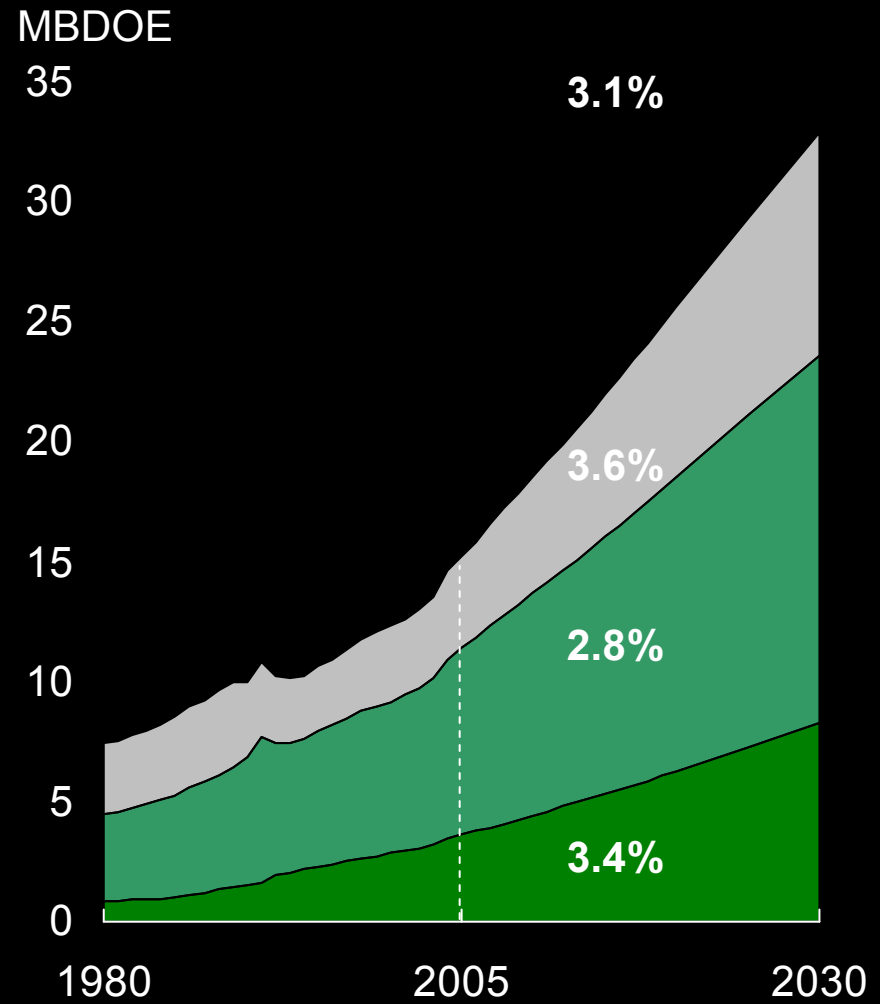


Global Transportation Demand

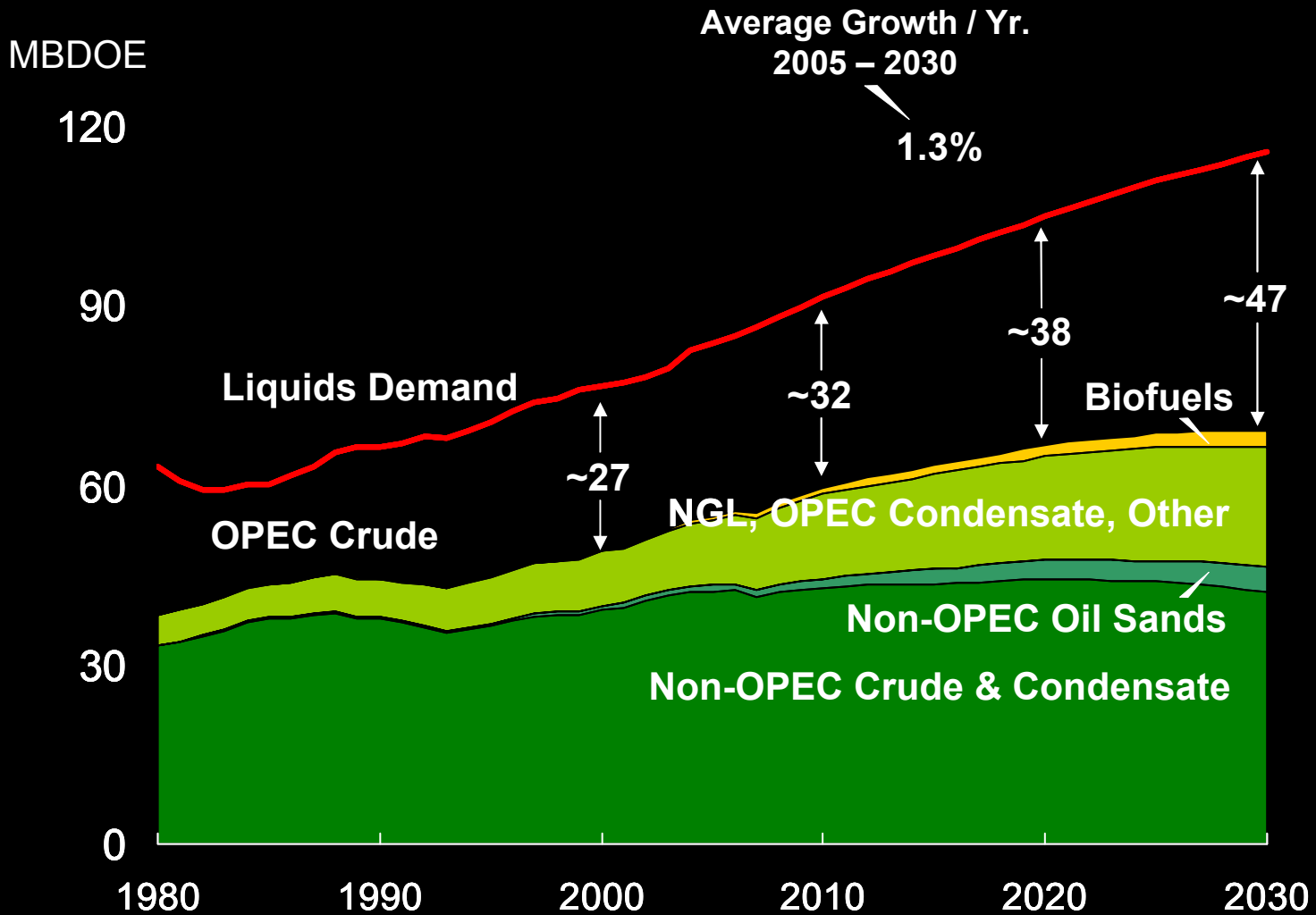
OECD



Non-OECD

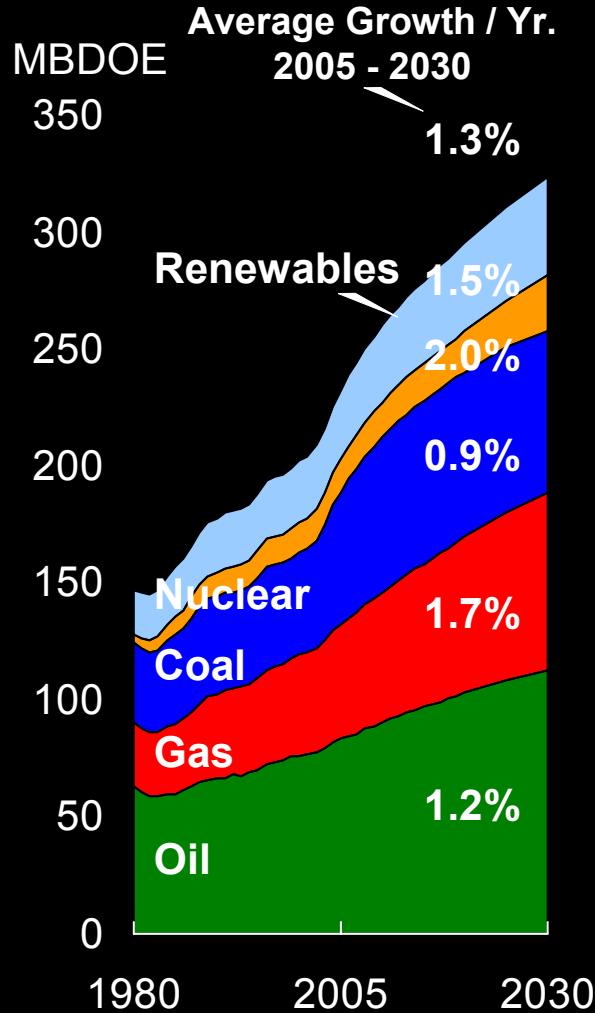


Liquids Supply & Demand

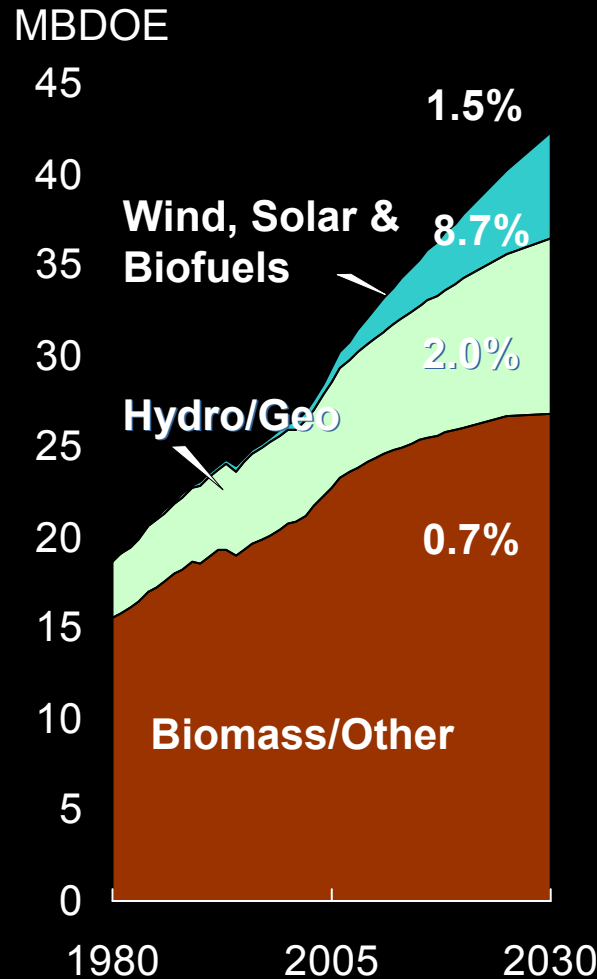


World Energy Demand – Primary Energy Supplies

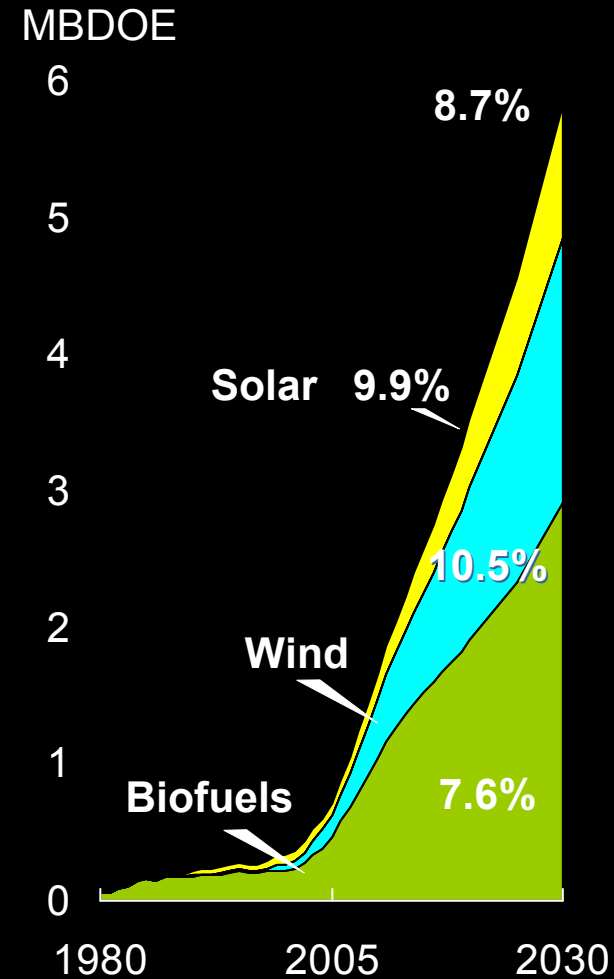
Primary Energy



Renewables

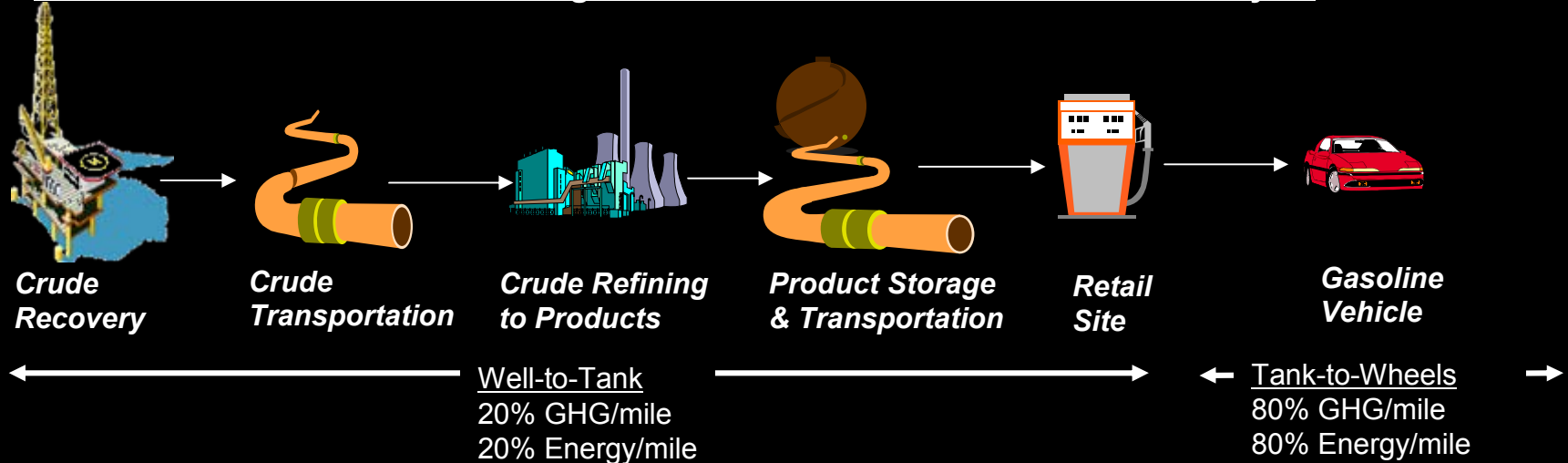


Wind, Solar & Biofuels



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Gasoline Internal Combustion Engine from Crude Oil – Well-to-Wheels Analysis



Well-to-Tank Technologies

- Energy Efficiency
- Cogeneration
- Flare Reduction

Tank-to-Wheels Technologies

- Advanced Lubricants (Mobil 1 AFE)
- Low weight plastics
- Films for Li-ion Batteries
- Tire Inner liners
- HCCI Research
- On-board hydrogen generation

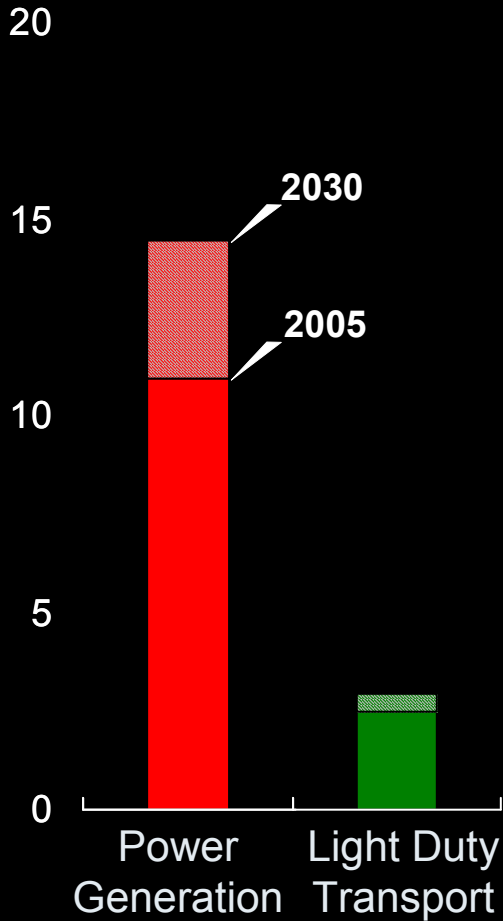
Global Climate and Energy Project (GCEP)

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CO₂ Mitigation Options

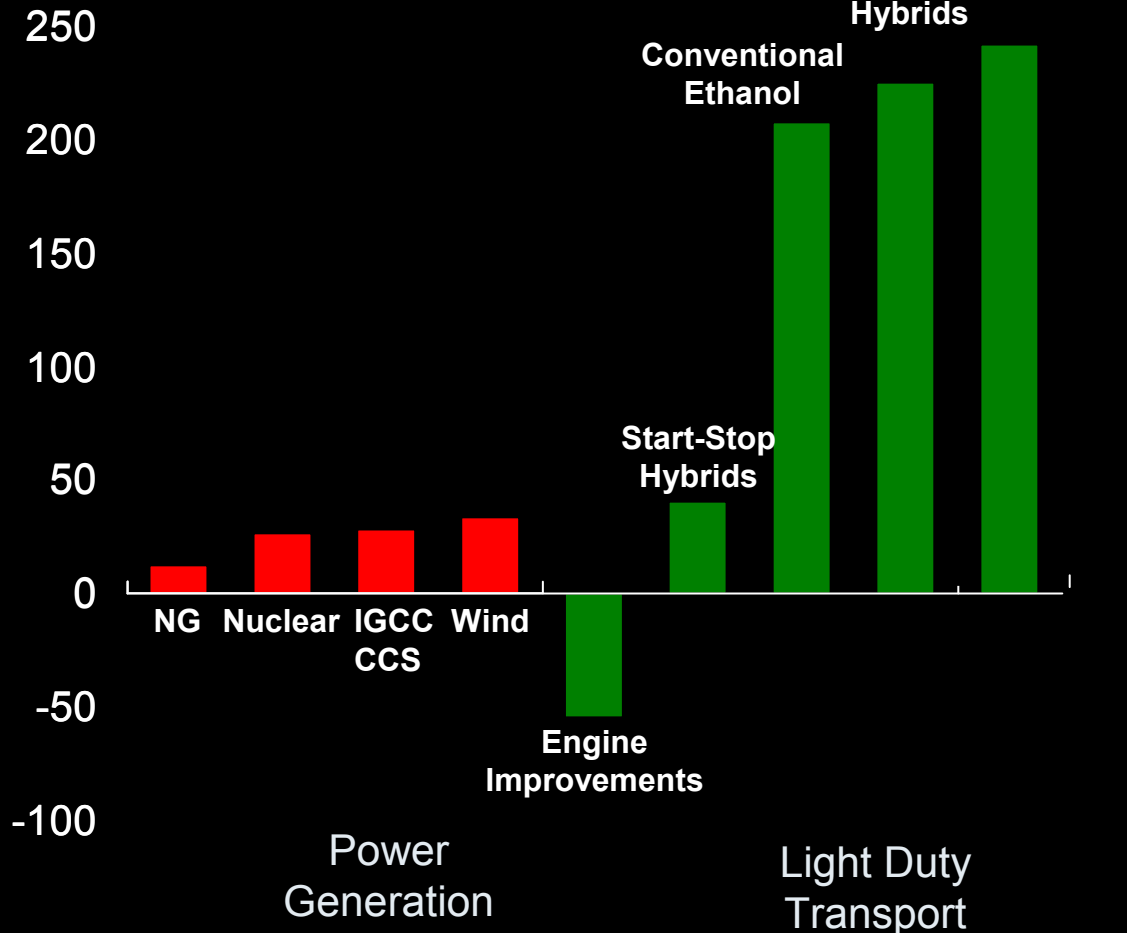
Scale

Annual CO₂ (Billion Tonnes)



Cost

\$ per Tonne CO₂ Avoided



Source: SFA Pacific, TNO-IEEP-LAT, JEC (2007)
 Biofuels do not include emerging land-impacts issues

Conclusions

- *Economic progress, especially in developing countries, will drive global energy demand higher despite substantial efficiency gains*
- *Oil, natural gas and coal are indispensable to meeting this energy demand, even with rapid growth in renewables*
- *Significantly impacting CO₂ emissions requires global participation, step changes in energy efficiency, technology gains and massive investment*