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 publicly-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.
Electricity Generation Leads Growth

Primary Energy Demand by Sector
Quadrillion BTUs

- Electricity Generation
- Industrial
- Transportation
- Res/Comm

ExxonMobil 2015 Outlook for Energy
United States Energy Demand

Primary Energy Demand by Sector
Quadrillion BTUs

- Electricity Generation
- Transportation
- Industrial
- Res/Comm

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Transportation Demand

Sector Demand
MBDOE

- Rail
- Marine
- Aviation
- Heavy Duty
- Light Duty

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Light Duty Vehicle Fleet and Demand

2040 LDV Fleet

World LDV Demand

*Mexico and Turkey included in Key Growth countries

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Light Duty Vehicle Efficiency

Fleet by Type
Million

Range of Average Vehicle Efficiency
On-Road Miles per Gallon

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U.S. Light Duty Vehicles

Light Duty Vehicles

- Million

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

U.S. New Vehicles

- Percent

- Boosted
- Hybrid
- Diesel
- Elec/PHEV

ExxonMobil 2015 Outlook for Energy
Today's Vehicle Technology Choices – U.S.

5-Year Cost of Ownership vs Conventional

2014 $k

- CNG
- Full Hybrid
- Plug-in Hybrid
- Battery Electric
- Fuel Cell

Cost above Conventional

Fuel Savings

~$30k

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Heavy Duty Transportation

Heavy Duty Demand by Region
MBDOE

Heavy Duty Demand by Fuel
MBDOE

*Mexico and Turkey included in Key Growth countries
Heavy Duty Vehicle Efficiency

New Truck Efficiency
% Improvement, 2010-2040

Efficiency Impact on Fuel Demand
MBDOE

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Energy-Related CO$_2$ Emissions by Sector