

The Outlook for Energy: A View to 2040

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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.

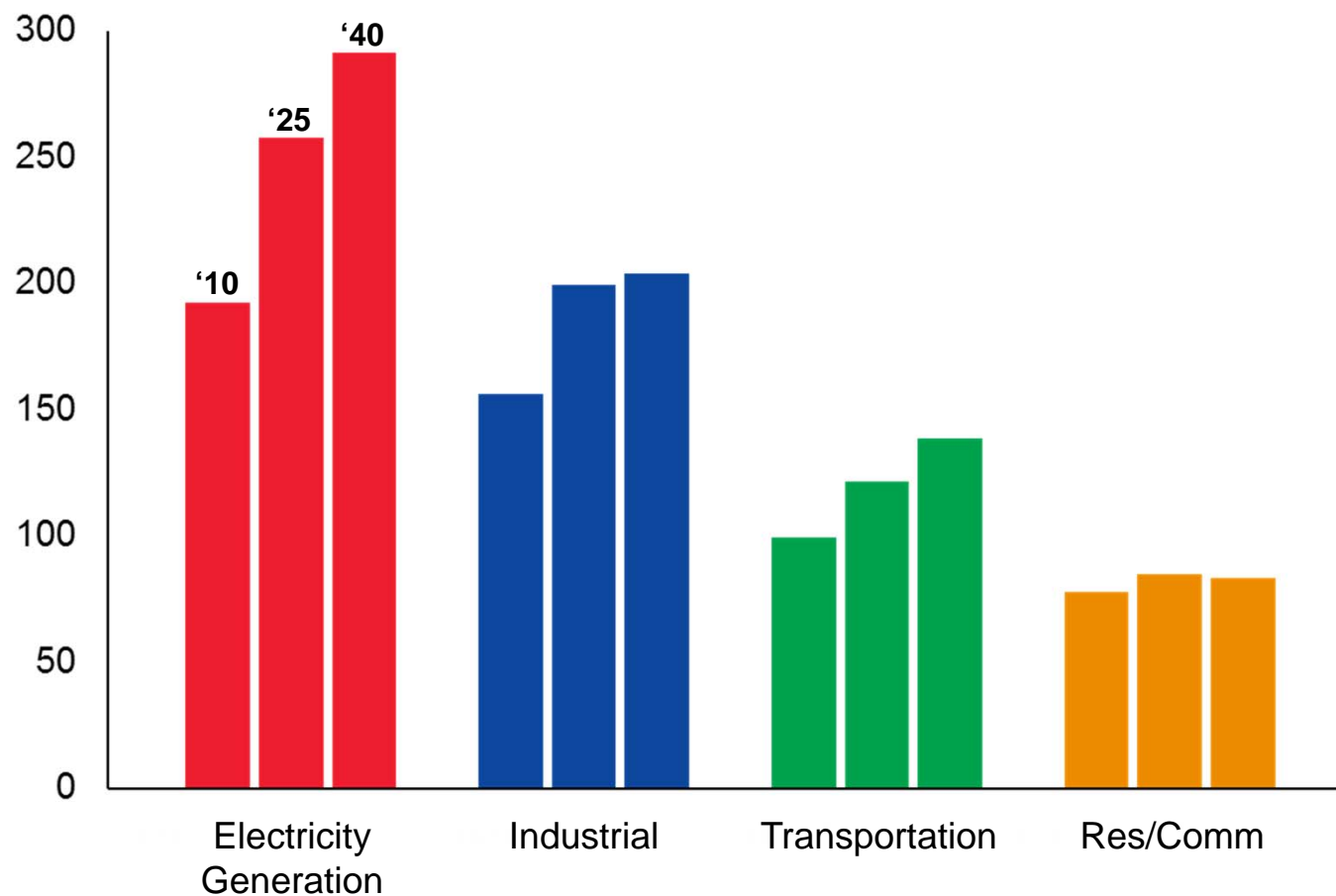
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Electricity Generation Leads Growth

Primary Energy Demand by Sector

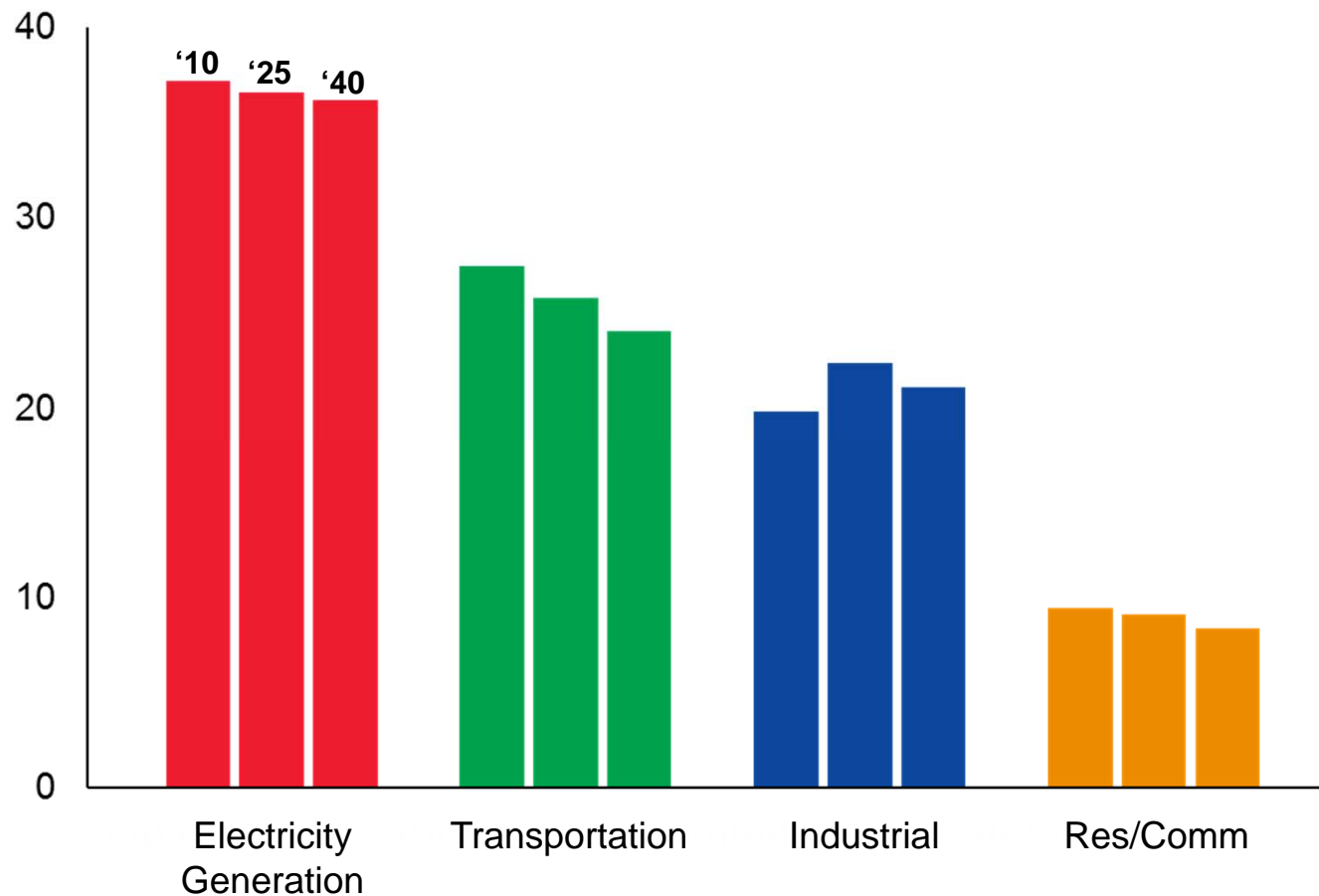
Quadrillion BTUs



United States Energy Demand

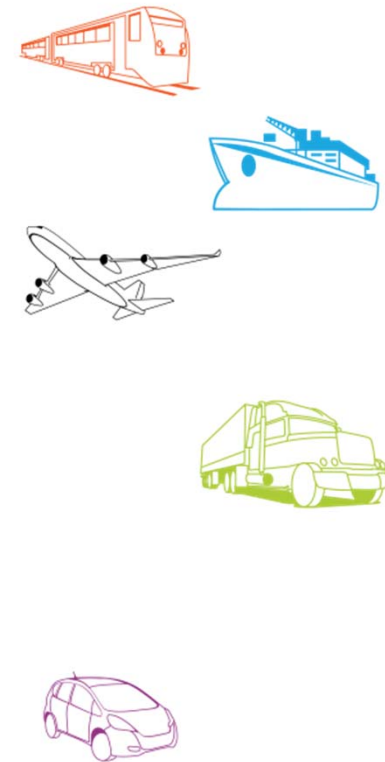
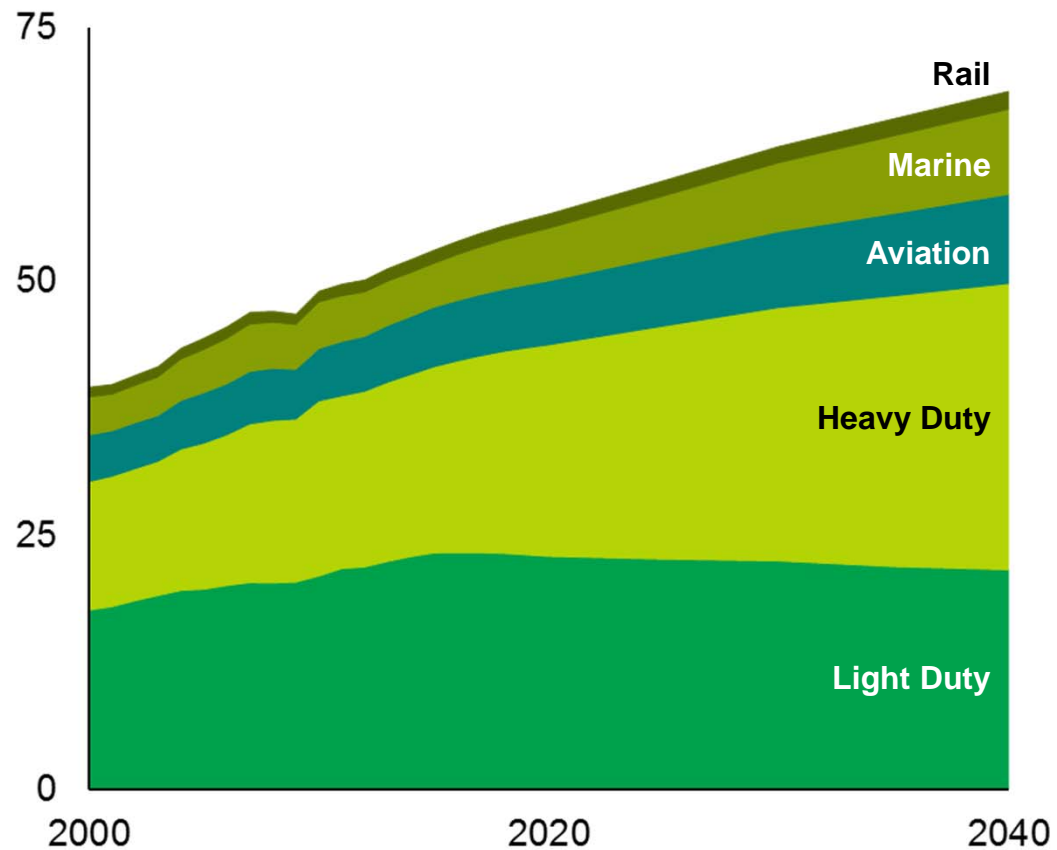
Primary Energy Demand by Sector

Quadrillion BTUs



Transportation Demand

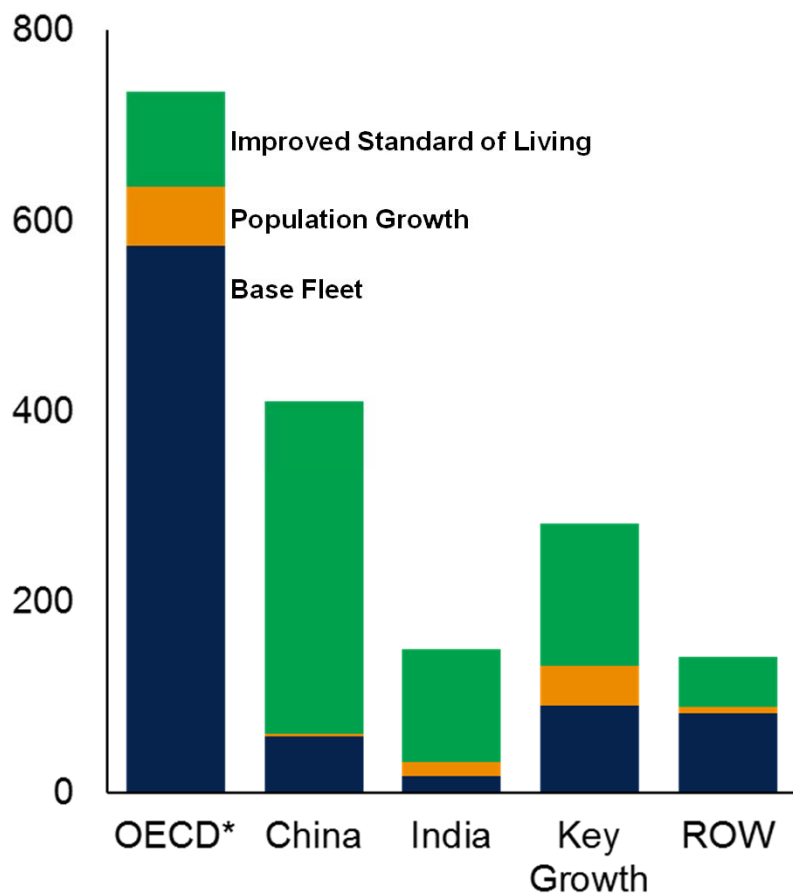
Sector Demand
MBDOE



Light Duty Vehicle Fleet and Demand

2040 LDV Fleet

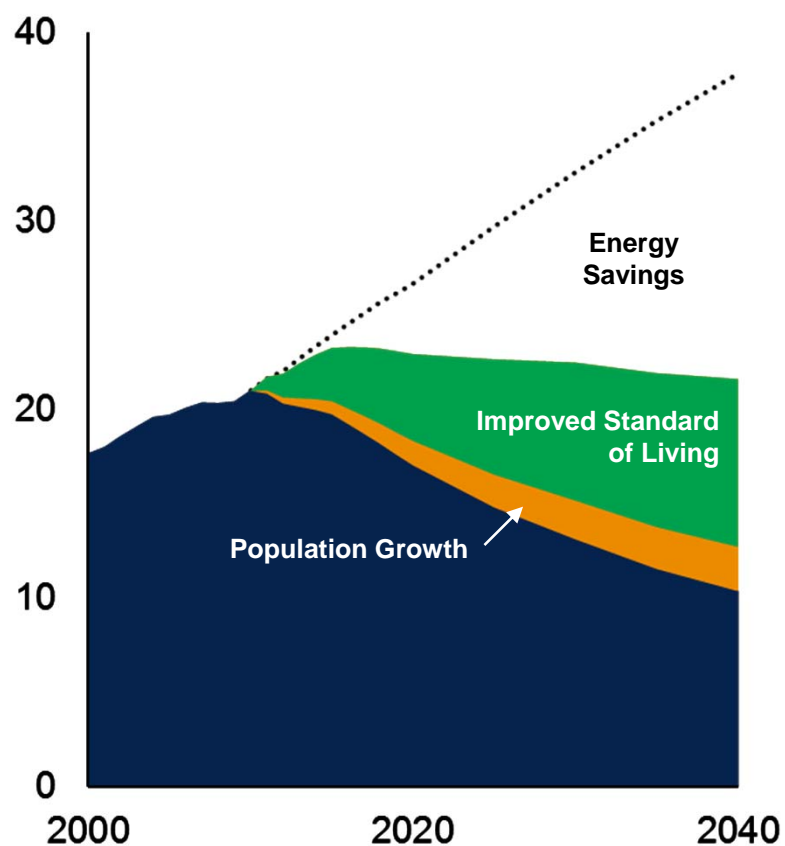
Million



*Mexico and Turkey included in Key Growth countries

World LDV Demand

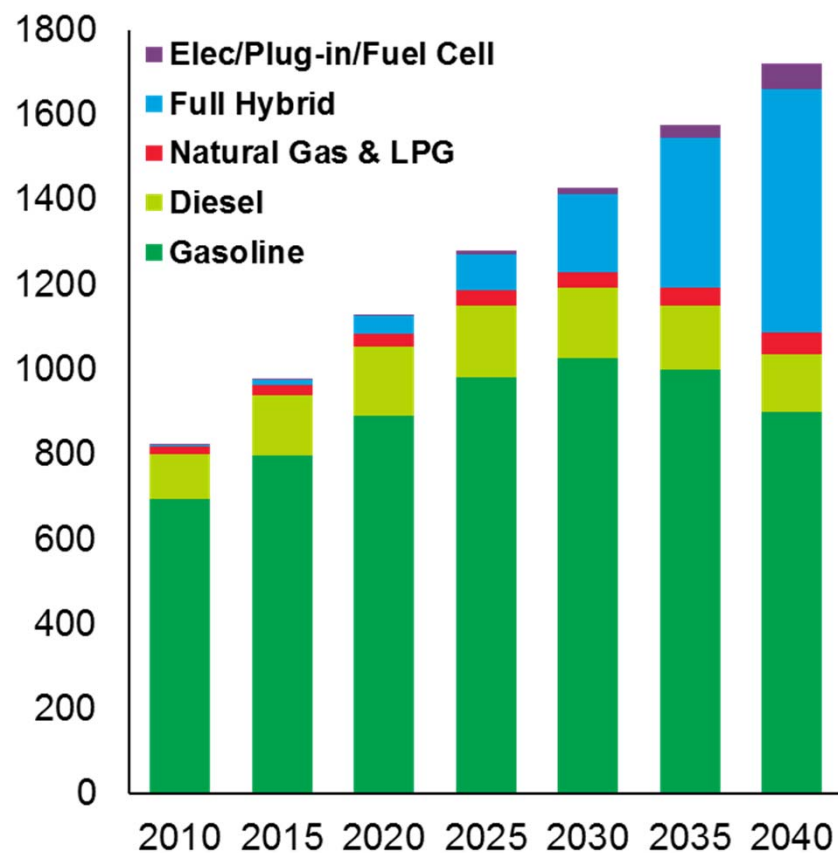
MBDOE



Light Duty Vehicle Efficiency

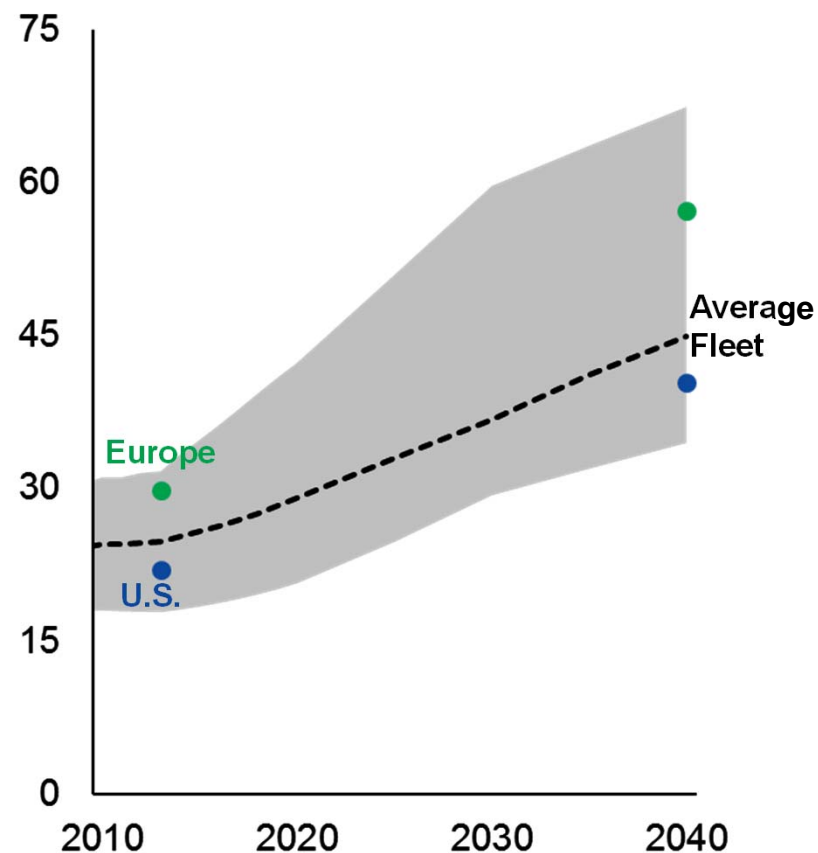
Fleet by Type

Million



Range of Average Vehicle Efficiency

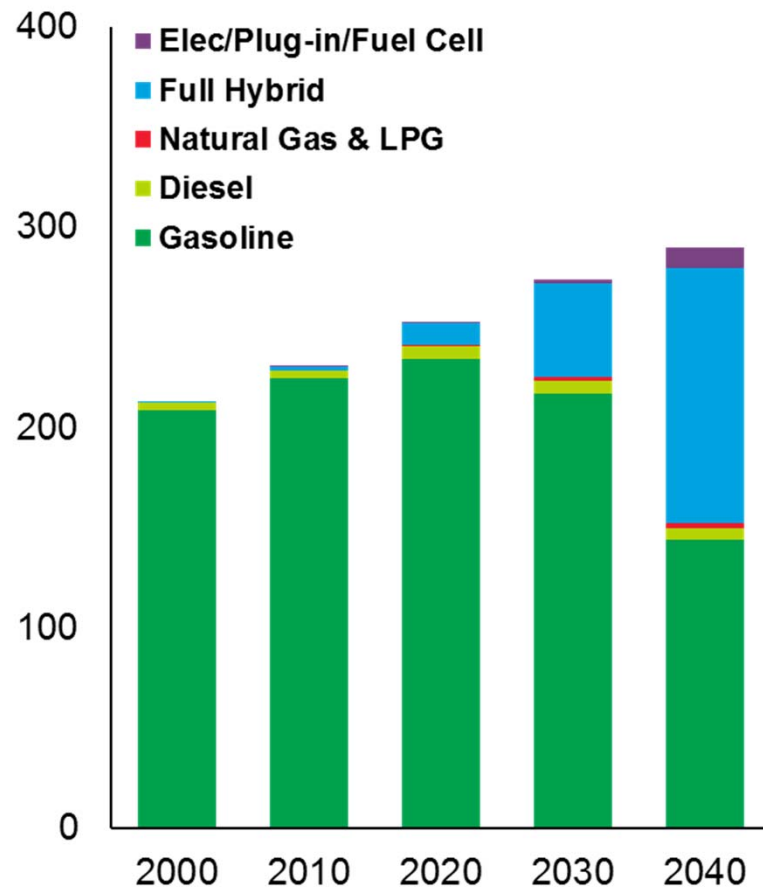
On-Road Miles per Gallon



U.S. Light Duty Vehicles

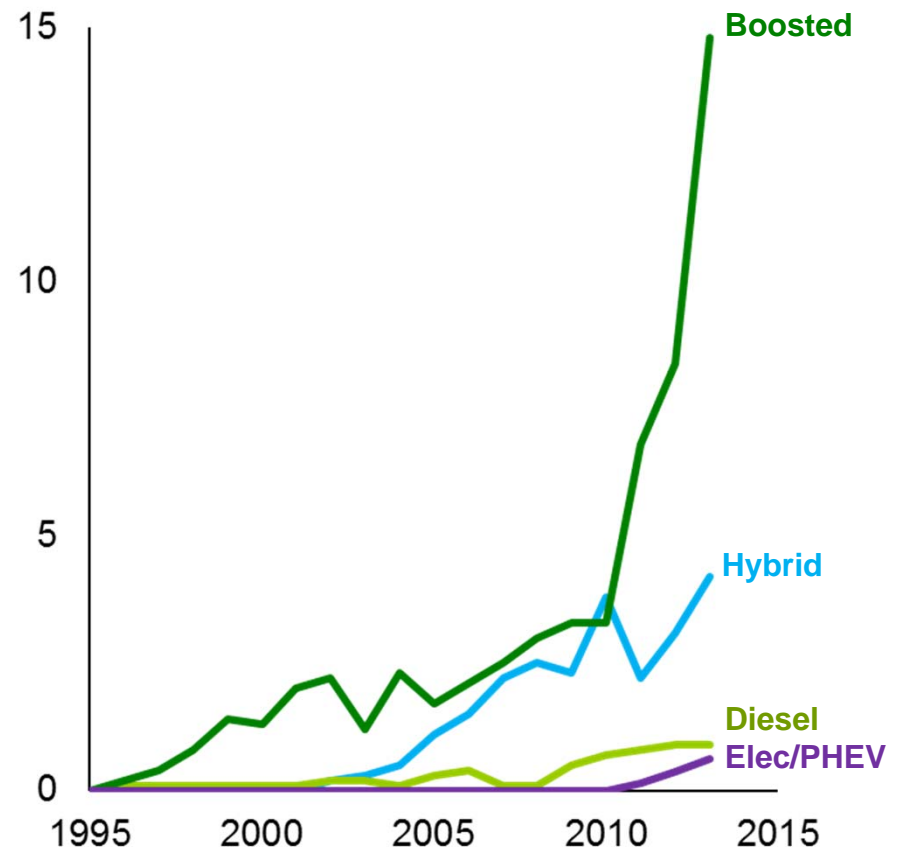
Light Duty Vehicles

Million



U.S. New Vehicles

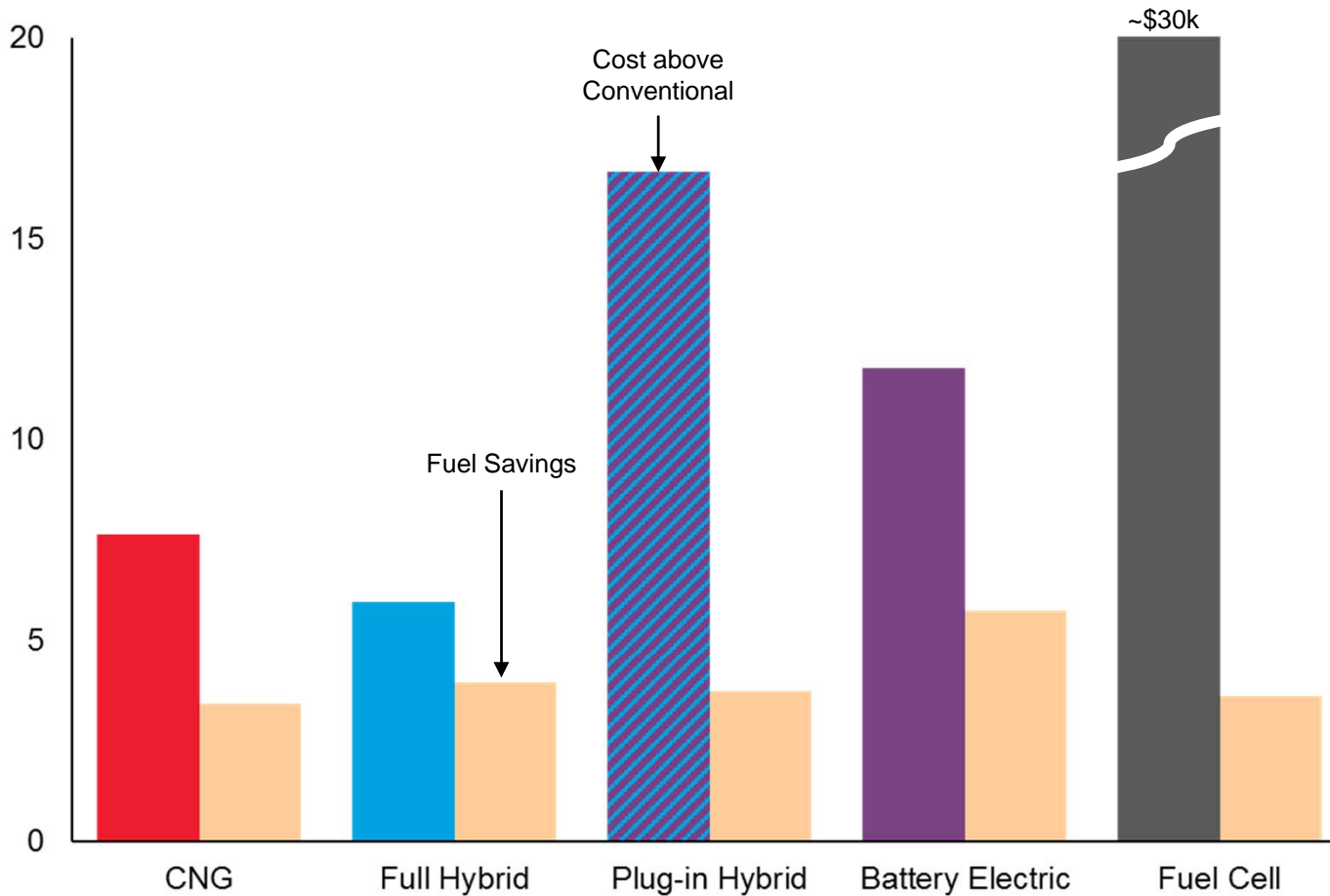
Percent



Today's Vehicle Technology Choices – U.S.

5-Year Cost of Ownership vs Conventional

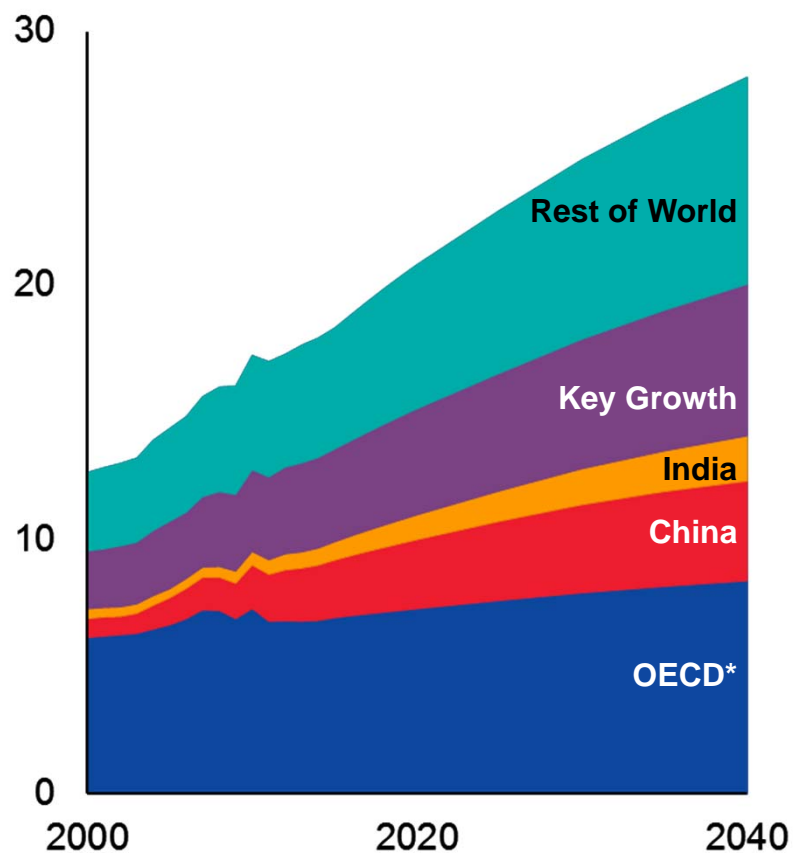
2014 \$k



Heavy Duty Transportation

Heavy Duty Demand by Region

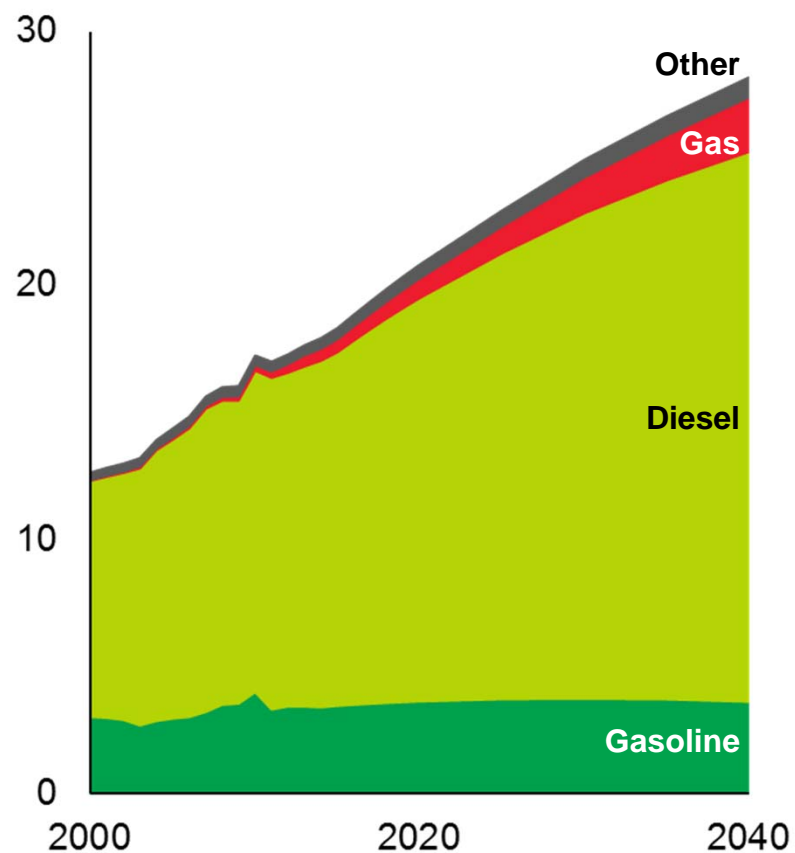
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**Mexico and Turkey included in Key Growth countries*

Heavy Duty Demand by Fuel

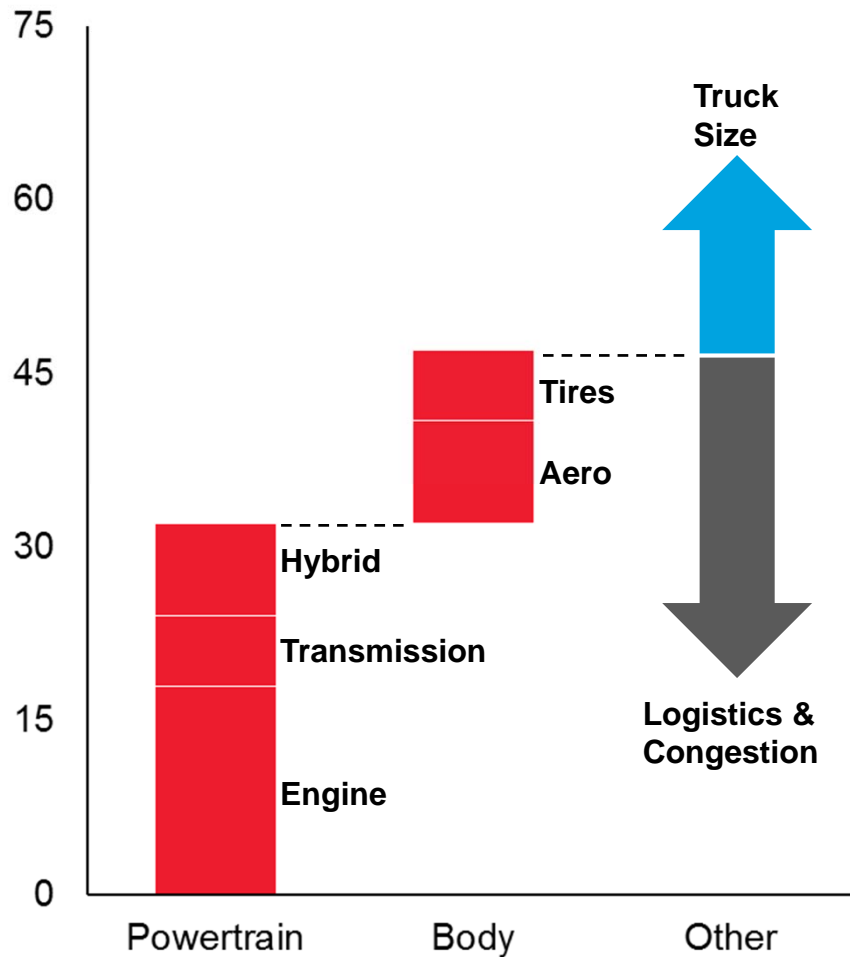
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Heavy Duty Vehicle Efficiency

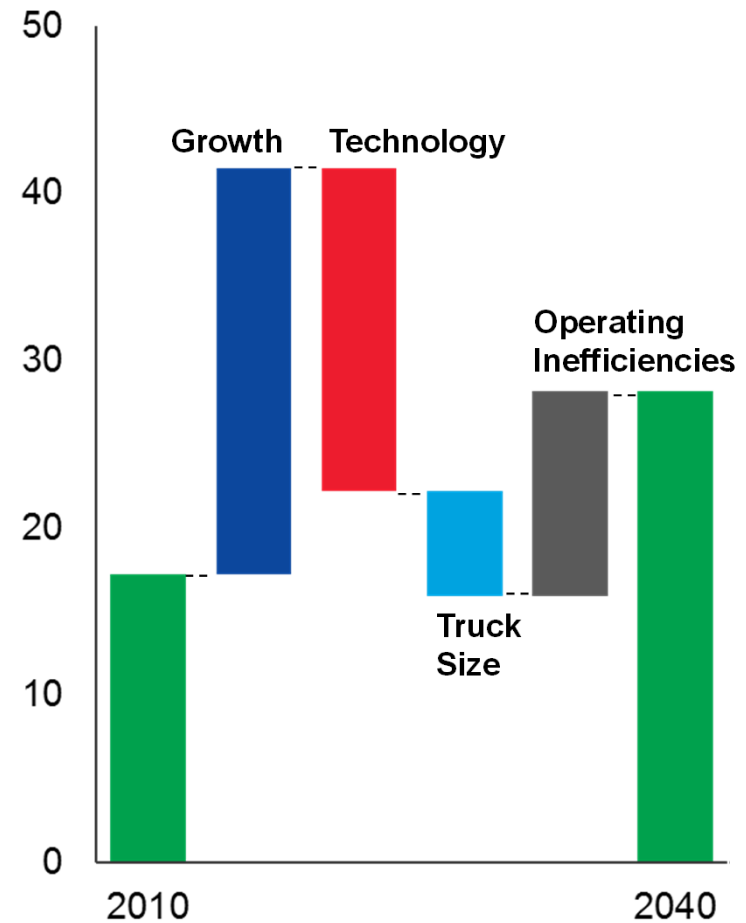
New Truck Efficiency

% Improvement, 2010-2040



Efficiency Impact on Fuel Demand

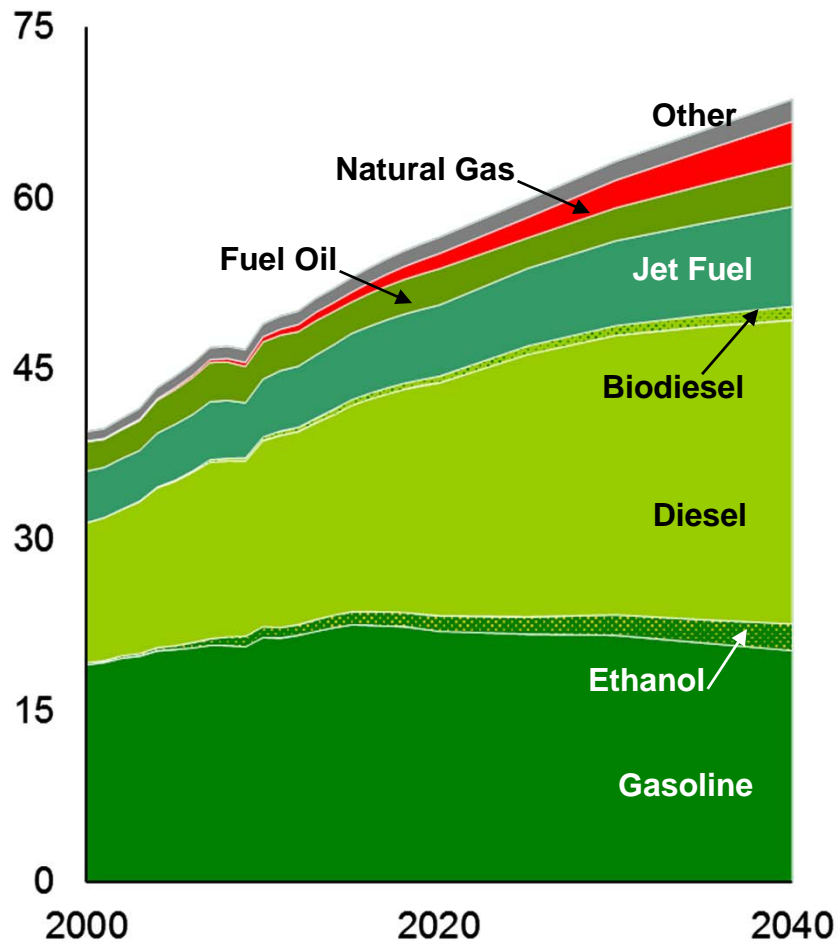
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Transportation Fuel Demand

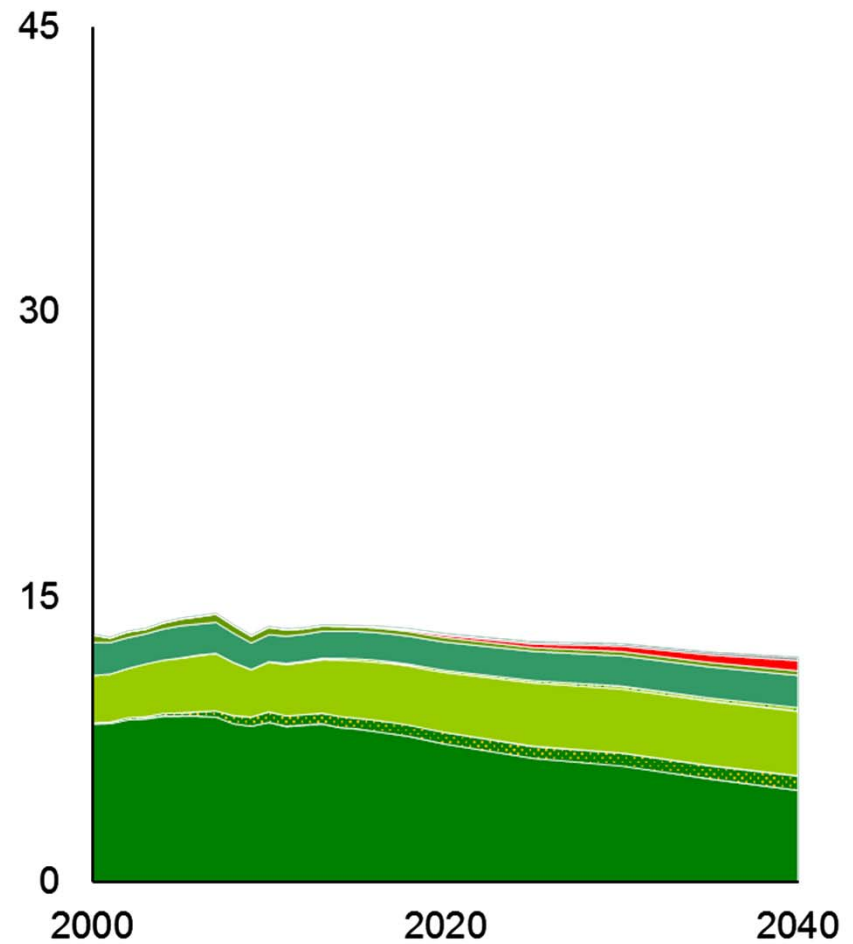
World

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United States

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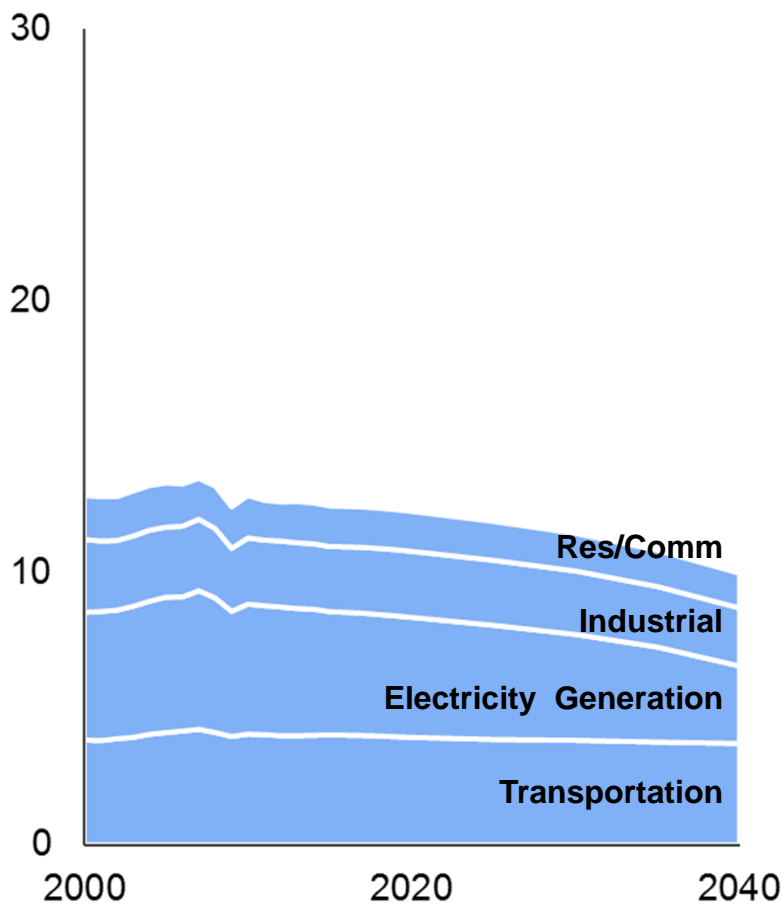
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Energy-Related CO₂ Emissions by Sector

OECD

Billion Tonnes



Non OECD

Billion Tonnes

