The Outlook for Energy includes ExxonMobil Corporation’s internal estimates and forecasts of energy demand, supply, and trends through 2040, based upon internal data and analyses as well as publicly available information from external sources including the International Energy Agency. Work on the report was conducted throughout 2017. This presentation includes forward-looking statements. Actual future conditions and results (including energy demand, energy supply, the relative mix of energy across regions, energy imports and exports, energy-related emissions, certain economic indicators, and other factors) could differ materially due to changes in economic conditions, 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. This material is not to be used or reproduced without the permission of ExxonMobil Corporation. All rights reserved.
Global trends continue to evolve

- +1.7 billion people
- 2x GDP
- +25% demand
- +1.7 billion people
- +10% CO₂ emissions
- -45% CO₂ intensity

Growth from 2016 level
Percent

2016
2040
Energy demand varies by sector

**End-use energy demand**
Quadrillion BTUs

**Primary energy demand**
Quadrillion BTUs

ExxonMobil 2018 Outlook for Energy
Two Paths to CO₂ Reduction

United States Generation Share
Percent

Germany Generation Share
Percent

CO₂ Intensity of Generation
g CO₂/kWh generation

Sources: EIA, UBA
LNG trade grows and diversifies

Europe and Asia Pacific dominate LNG imports

Abundant gas supplies underpin new LNG exports

<table>
<thead>
<tr>
<th>Region</th>
<th>2016</th>
<th>2040</th>
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<tr>
<td>Europe</td>
<td>20</td>
<td>80</td>
</tr>
<tr>
<td>Japan/Korea/Taiwan/Singapore</td>
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<td>60</td>
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<tr>
<td>Other Asia Pacific</td>
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<tr>
<td>Asia Pacific Growth</td>
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<tr>
<td>Rest of World</td>
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