



2018 Outlook for Energy: A View to 2040

Japan-Texas Economic Summit

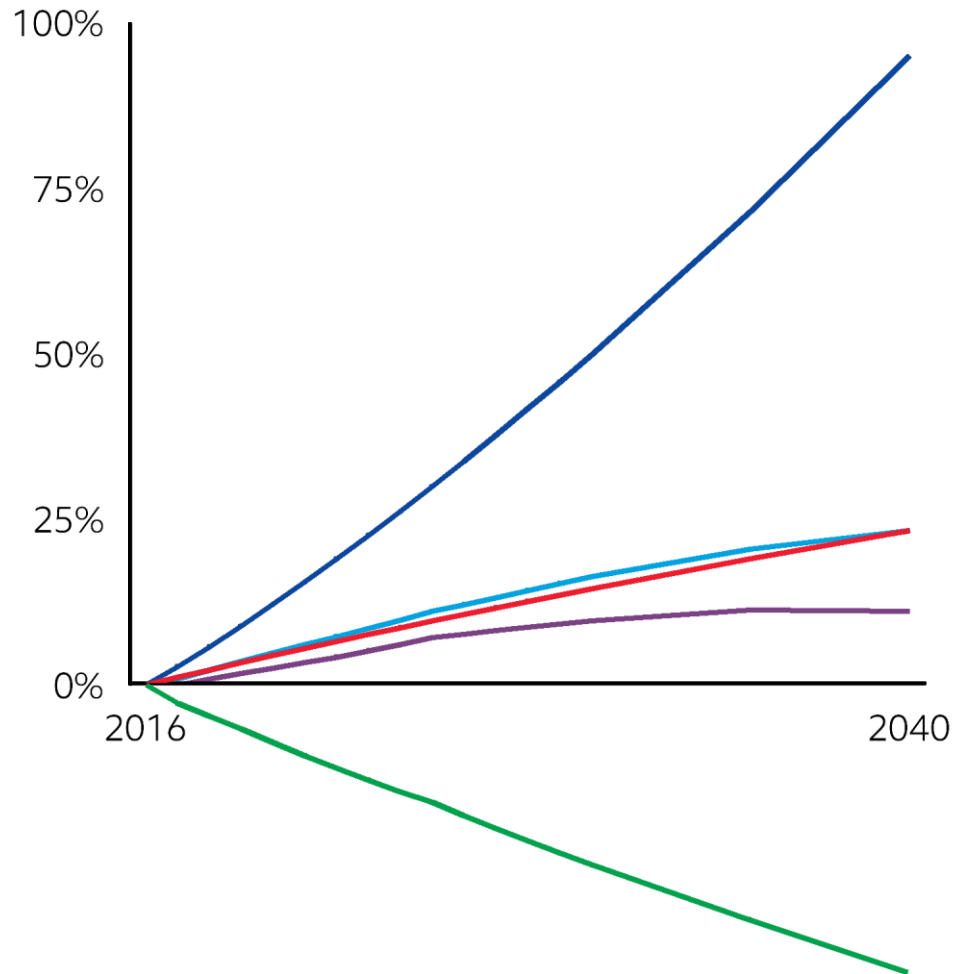
May 8, 2018

The Outlook for Energy includes Exxon Mobil 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 sources, economic sectors and geographic regions, imports and exports of energy) 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 Exxon Mobil Corporation. All rights reserved.

Global trends continue to evolve

Growth from 2016 level

Percent



2016



2x
GDP



+25%
demand



+1.7 billion
people



+10%
CO₂ emissions

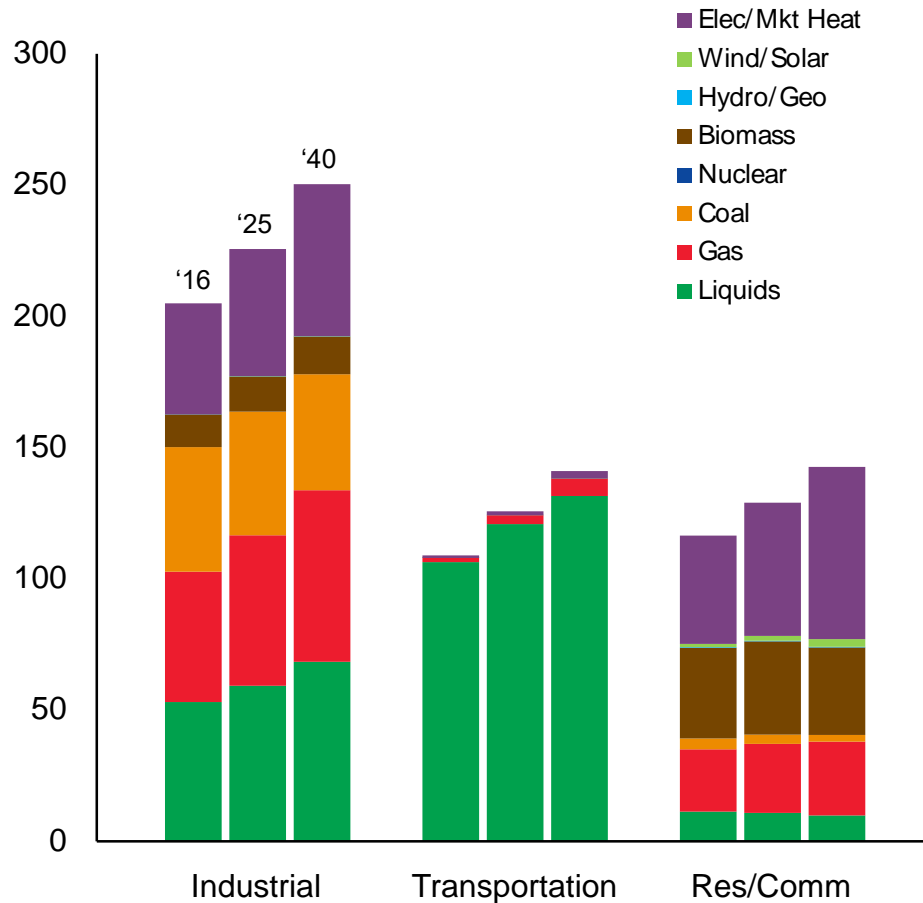


-45%
CO₂ intensity

Energy demand varies by sector

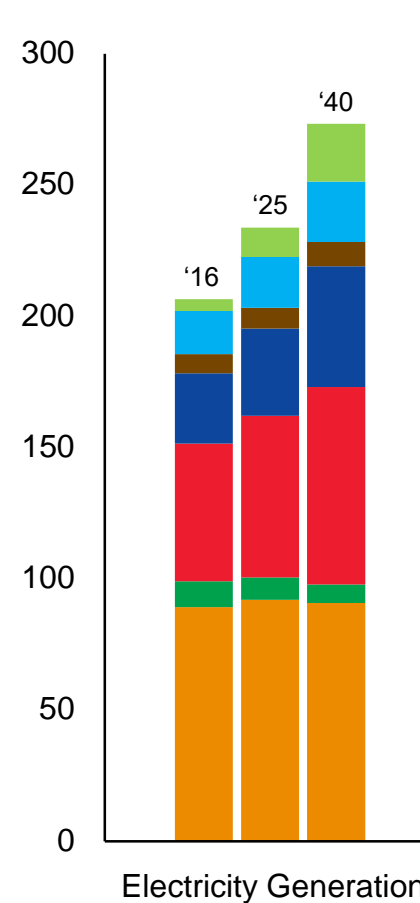
End-use energy demand

Quadrillion BTUs



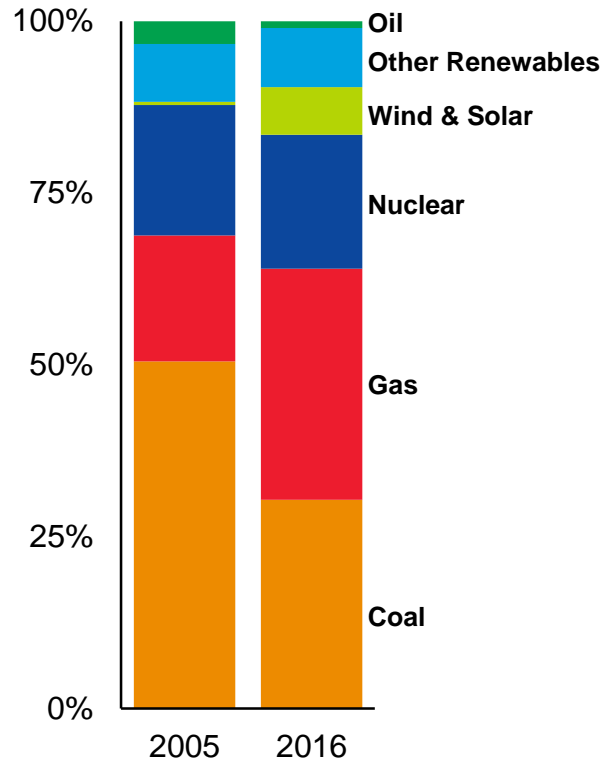
Primary energy demand

Quadrillion BTUs

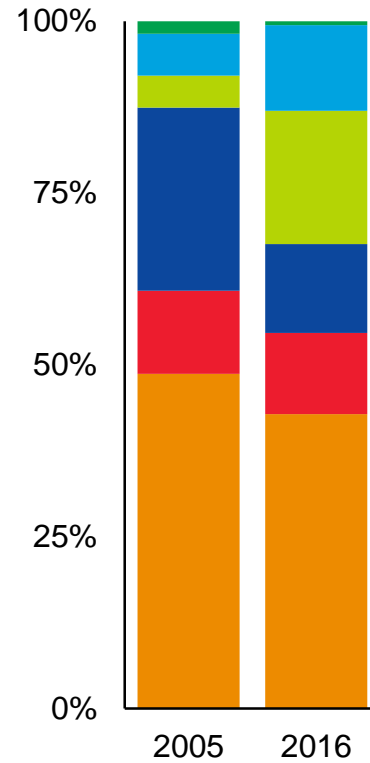


Two Paths to CO₂ Reduction

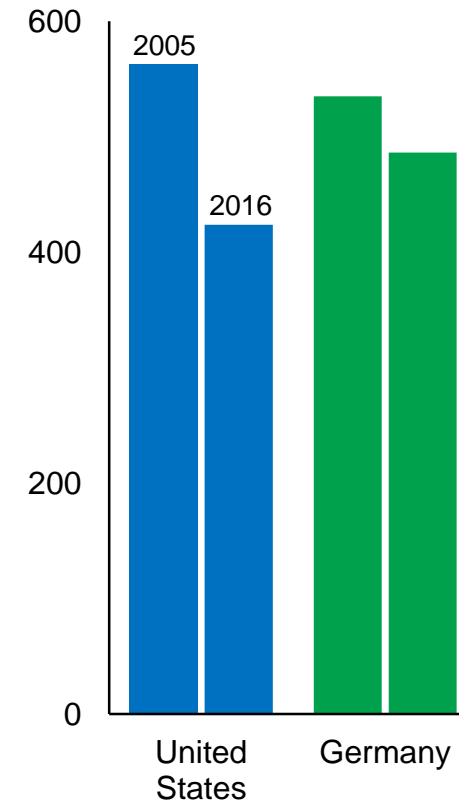
United States Generation Share
Percent



Germany Generation Share
Percent



CO₂ Intensity of Generation
g CO₂/kWh generation

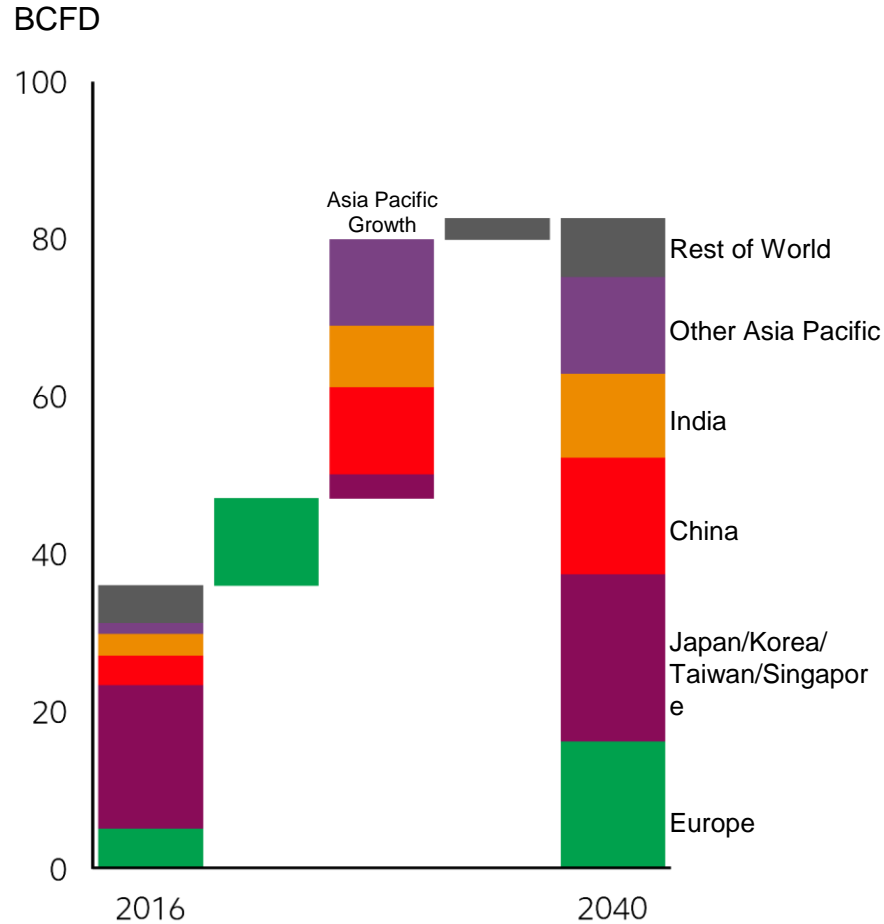


Sources: EIA, UBA

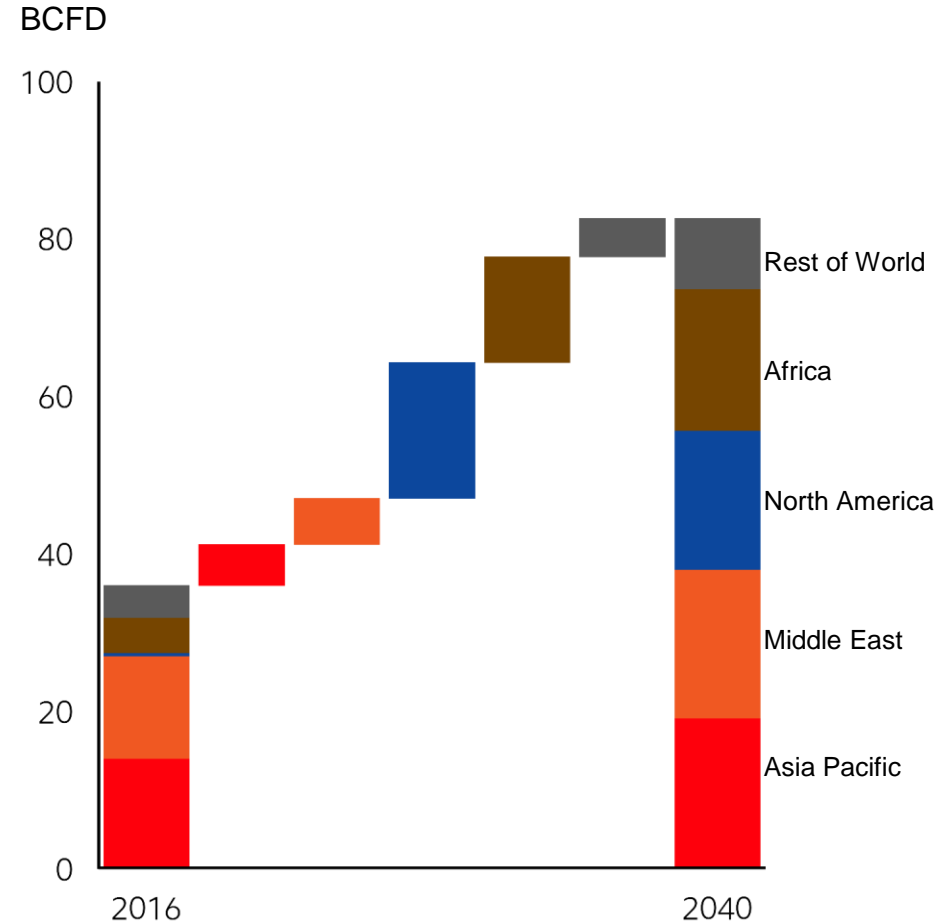
ExxonMobil 2018 Outlook for Energy

LNG trade grows and diversifies

Europe and Asia Pacific dominate LNG imports



Abundant gas supplies underpin new LNG exports



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