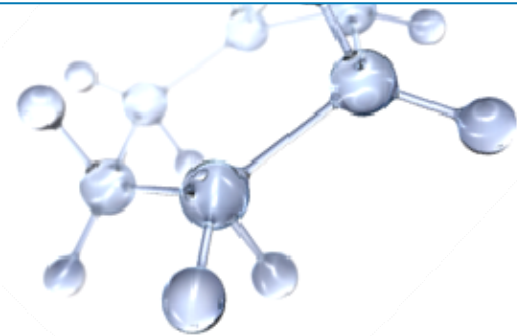


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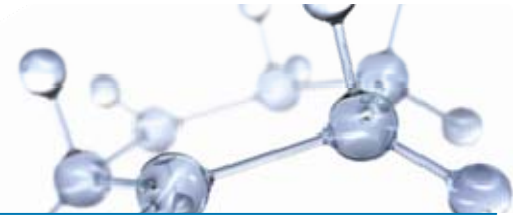
Global Gas Outlook: New Gas Chains



International Petroleum Technology Conference
December 8, 2009
Thomas R. Walters

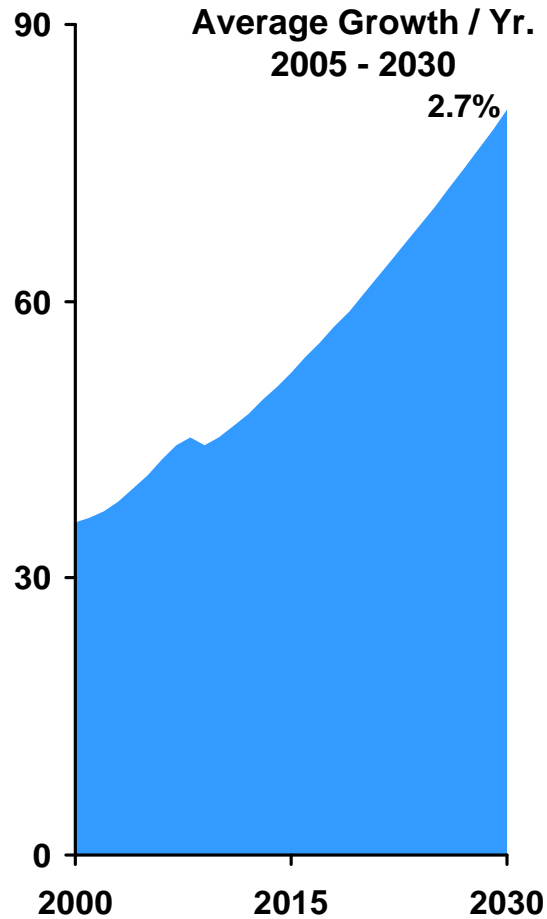
This presentation includes forward-looking statements. Actual future conditions (including economic conditions, energy demand, and energy supply) could differ materially due to changes in technology, the development of new supply sources, political events, demographic changes, and other factors discussed 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.

World Economics and Energy



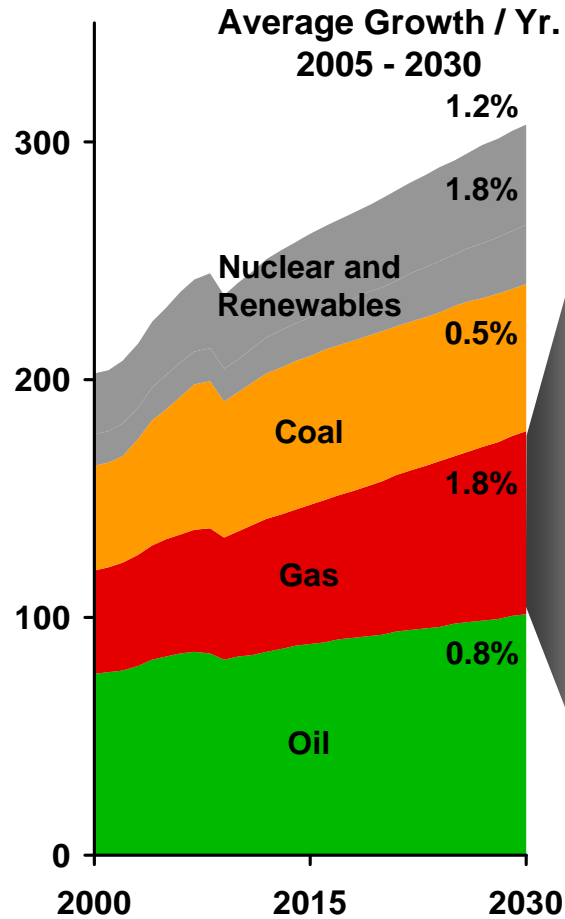
GDP

Trillion 2005\$



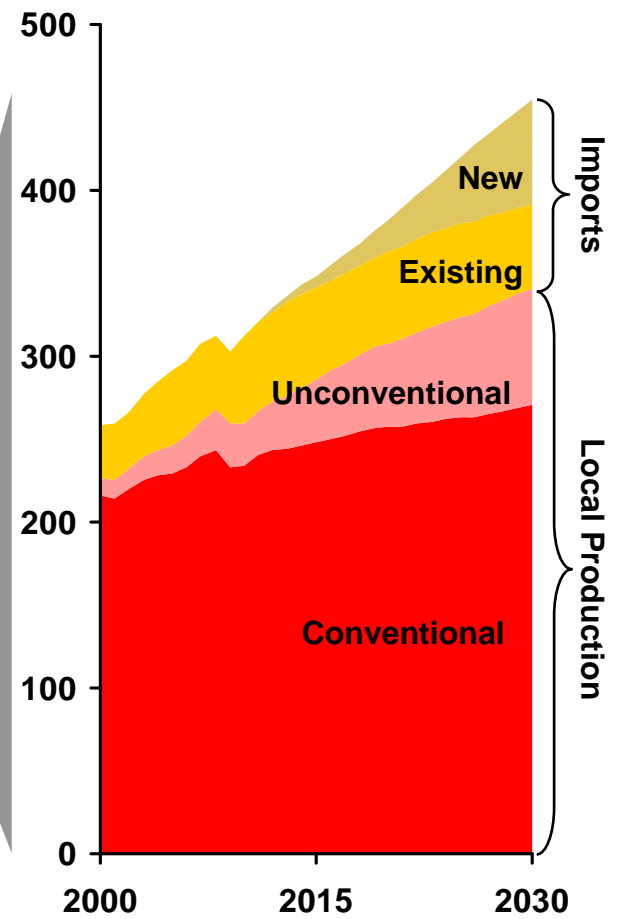
Energy Demand

MBDOE

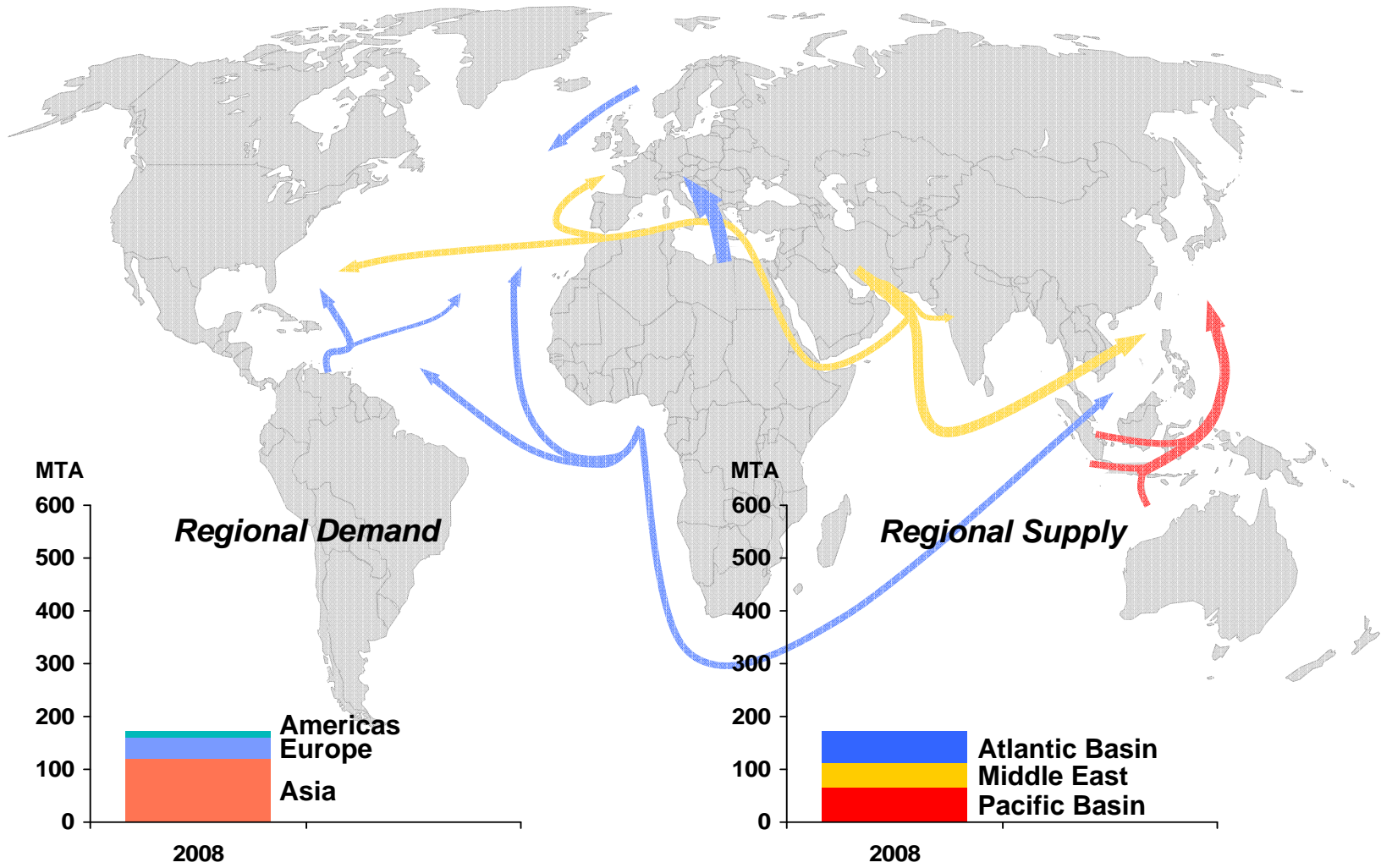
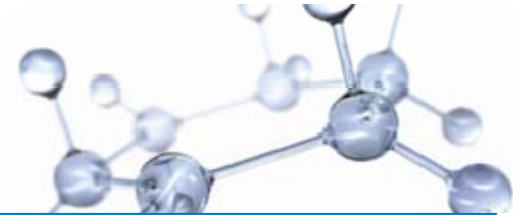


Gas Demand

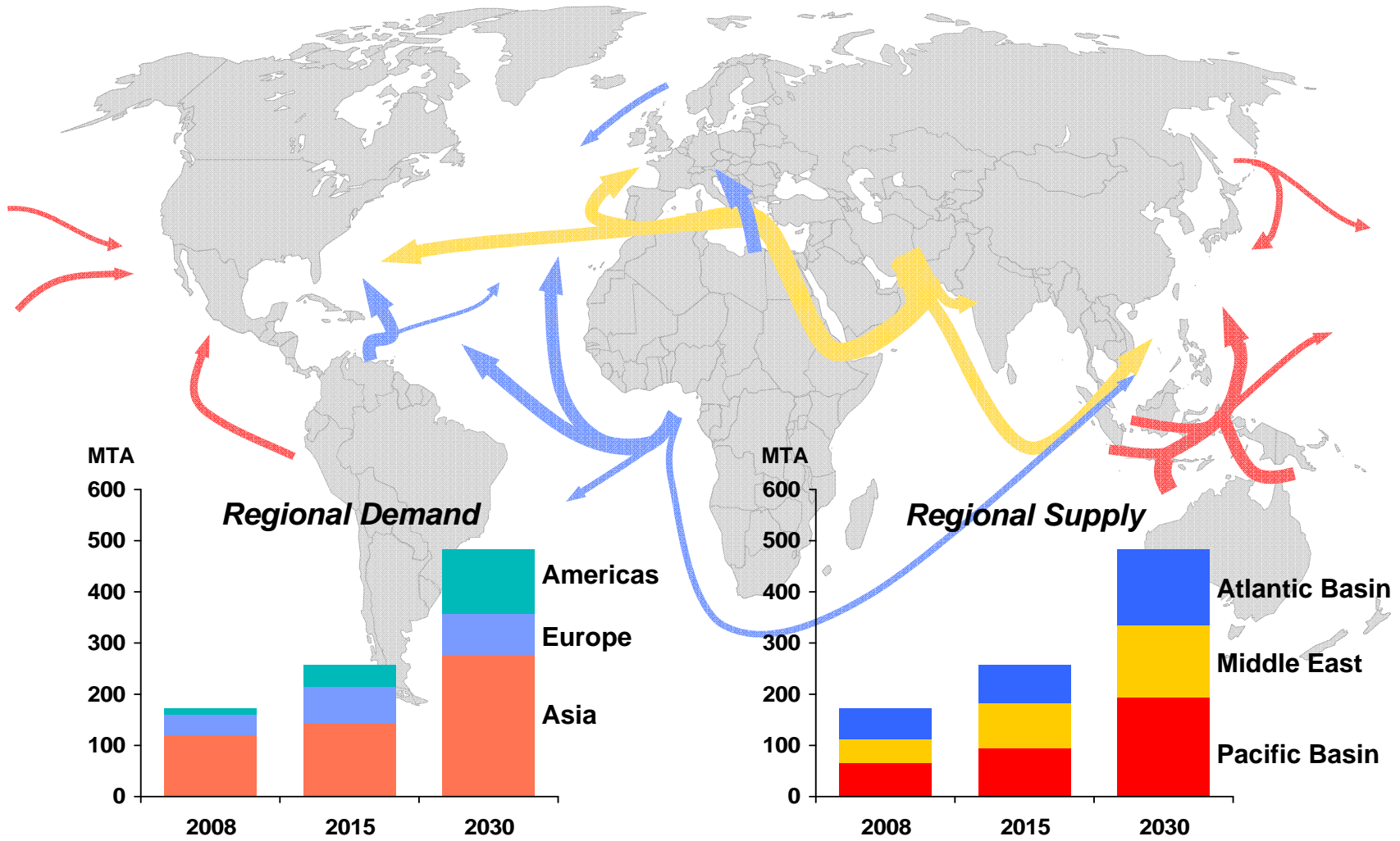
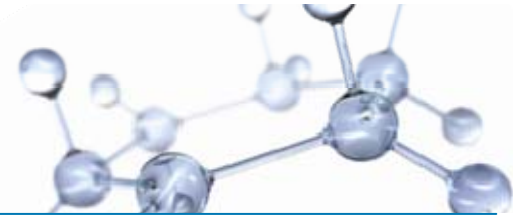
BCFD



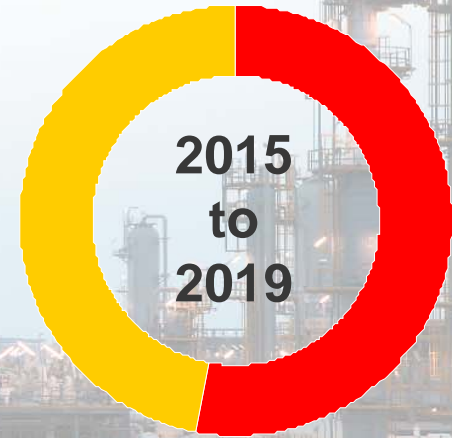
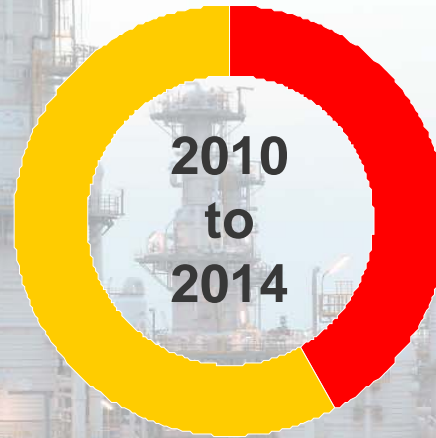
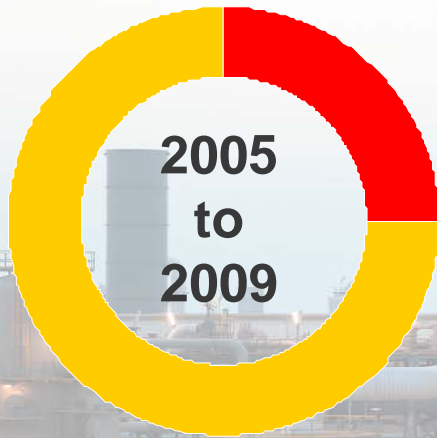
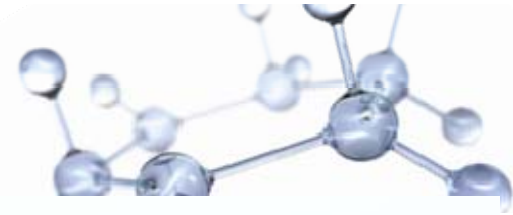
LNG Supply & Demand in 2008



LNG Supply & Demand in 2030



Increasing Scale of Projects



Gross Project Capex ■ \$1bn – \$5bn
 ■ >\$5bn

the power of the drop
THE ENERGY TO TRANSFORM

- Large projects required to develop complex and remote resources
- Increasing importance of capability to execute mega projects

Summary



- Economic progress, especially in developing countries, will drive higher energy demand
- Gas will continue to play an increasing role in meeting global energy demand
- Gas supplies continue to grow, with LNG connecting the markets
- Increasing proportion of large scale projects required to develop complex and remote resources
- Conceptualization, commercialization and execution of large scale projects will be key determinants of success