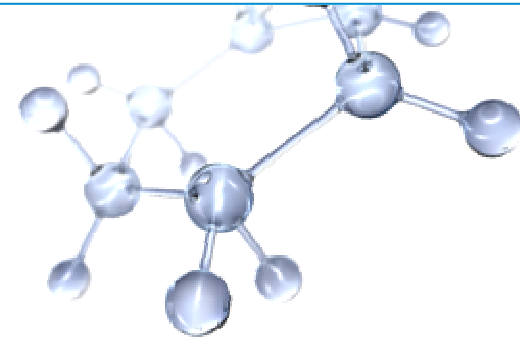


***Natural Gas Outlook***  
***Resource Development Council for Alaska***  
***November 17, 2010***



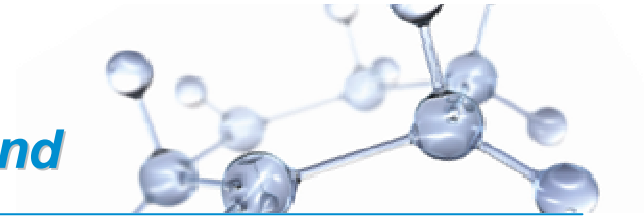
**Emma Cochrane**

Manager – Business Planning & Analysis

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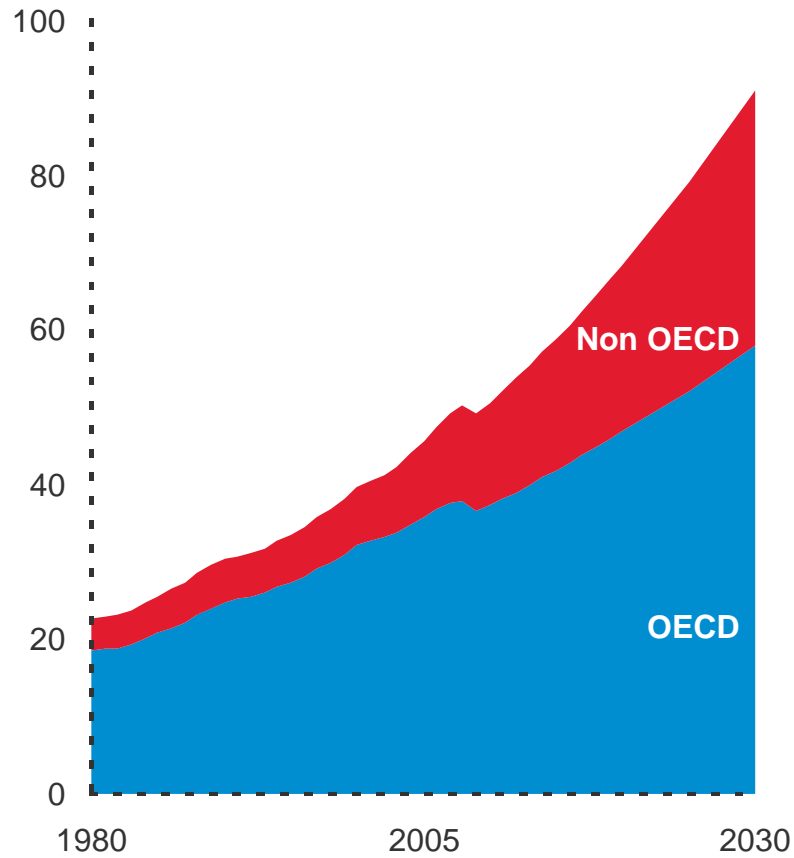
This presentation includes forward-looking statements. Actual future conditions (including economic conditions, energy demand, and energy supply) could differ materially due to changes in technology, the development of new supply sources, political events, demographic changes, and other factors discussed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

# Economic Progress Drives Energy Demand



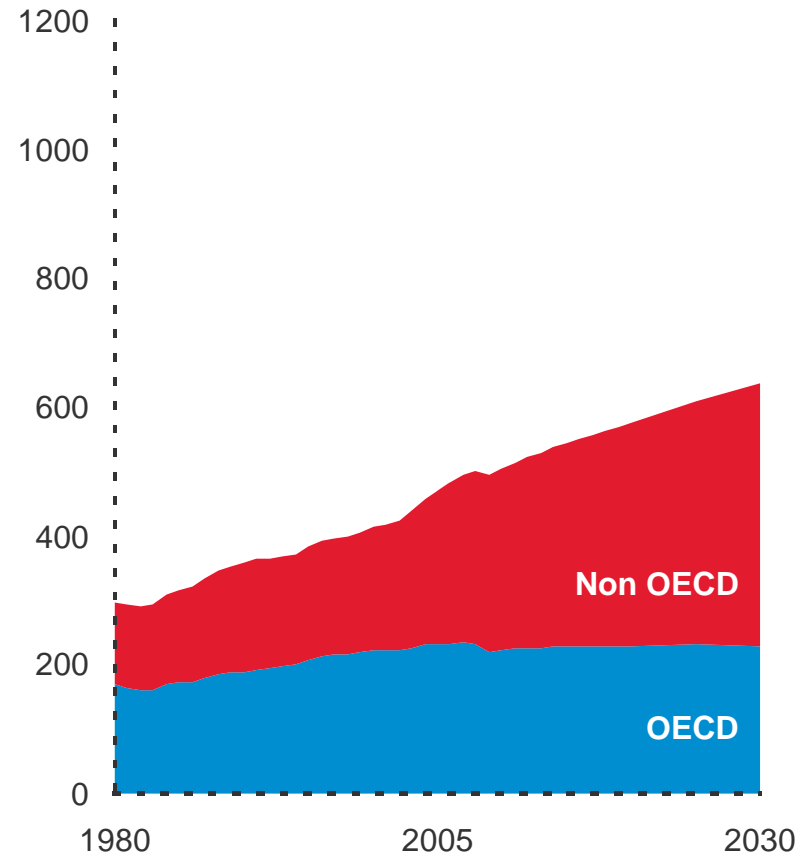
## Gross Domestic Product

Trillion 2005\$ GDP



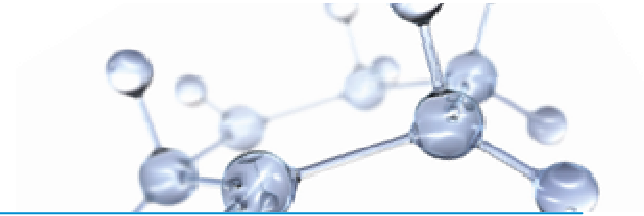
## Global Energy Demand

Quadrillion BTUs



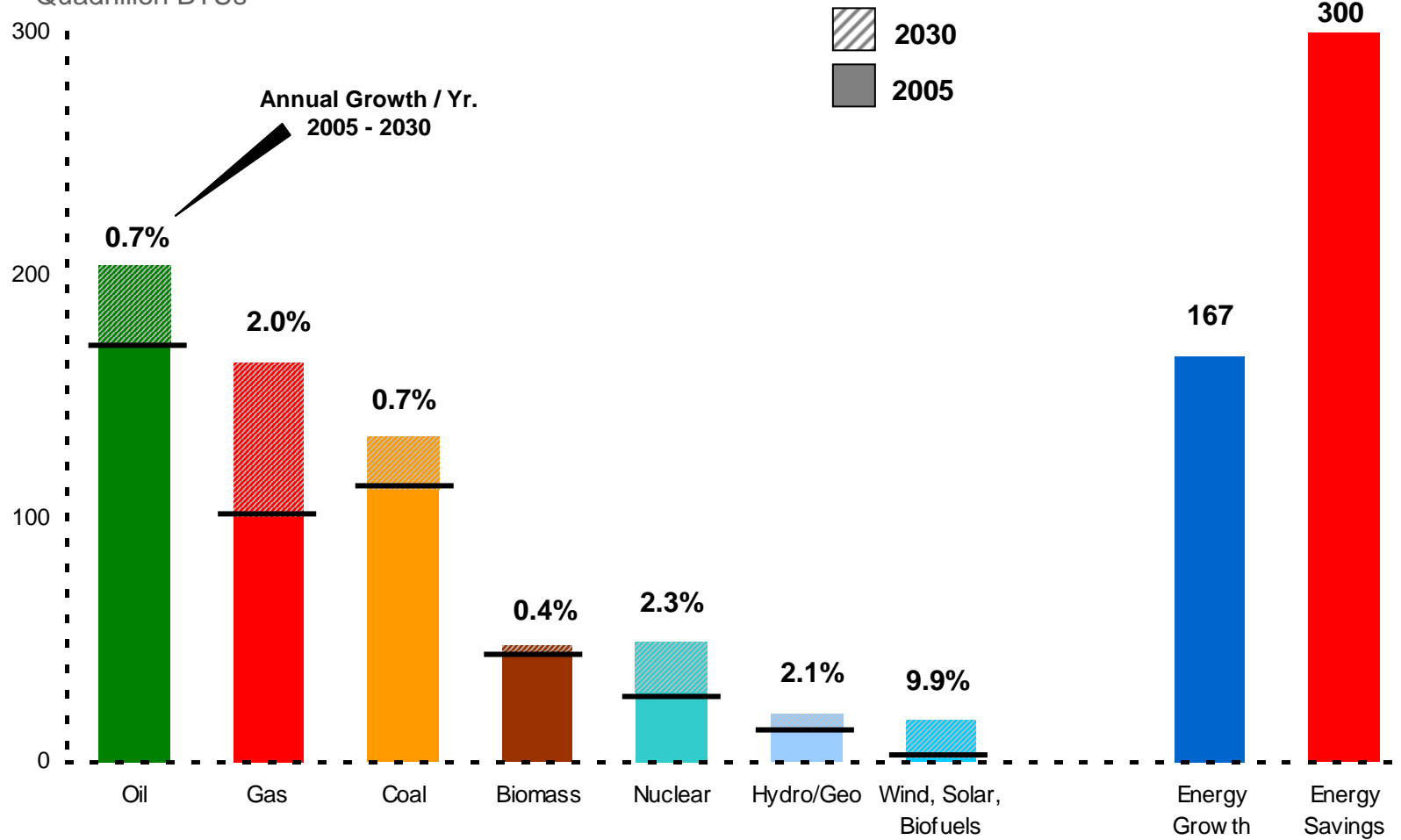
Source: ExxonMobil

# Energy Mix Continues to Evolve



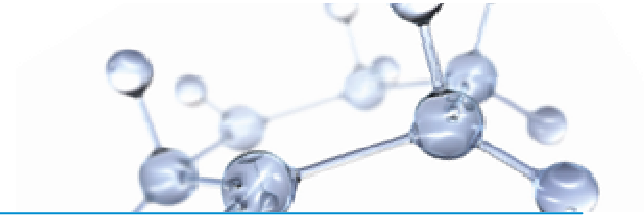
## Demand and Supply

Quadrillion BTUs



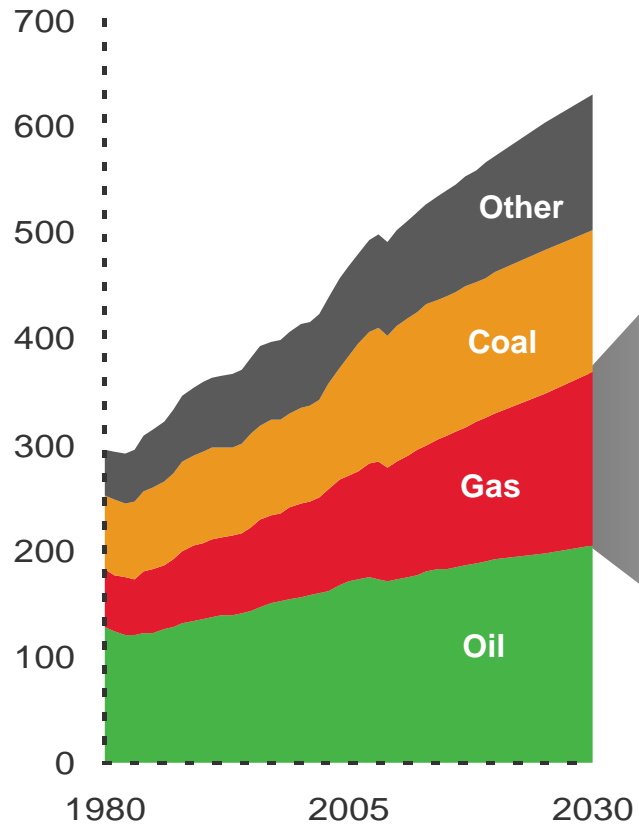
Source: ExxonMobil

# Natural Gas Grows in All Areas



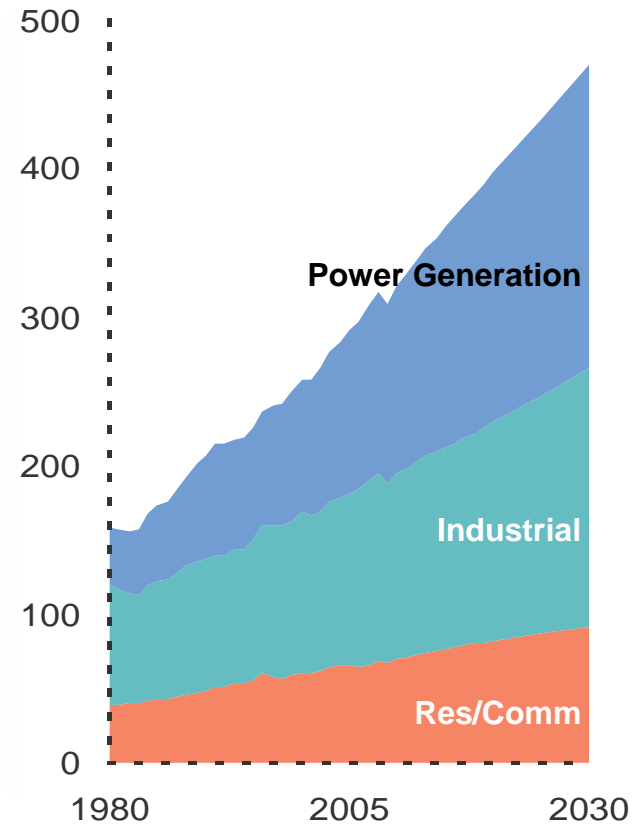
## Global Demand

Quadrillion BTUs



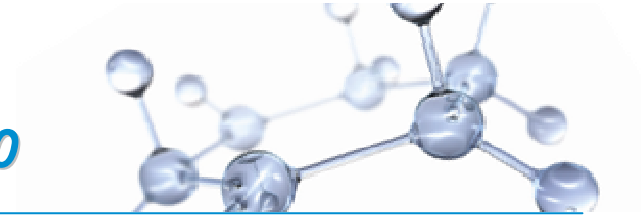
## By Sector

BCFD

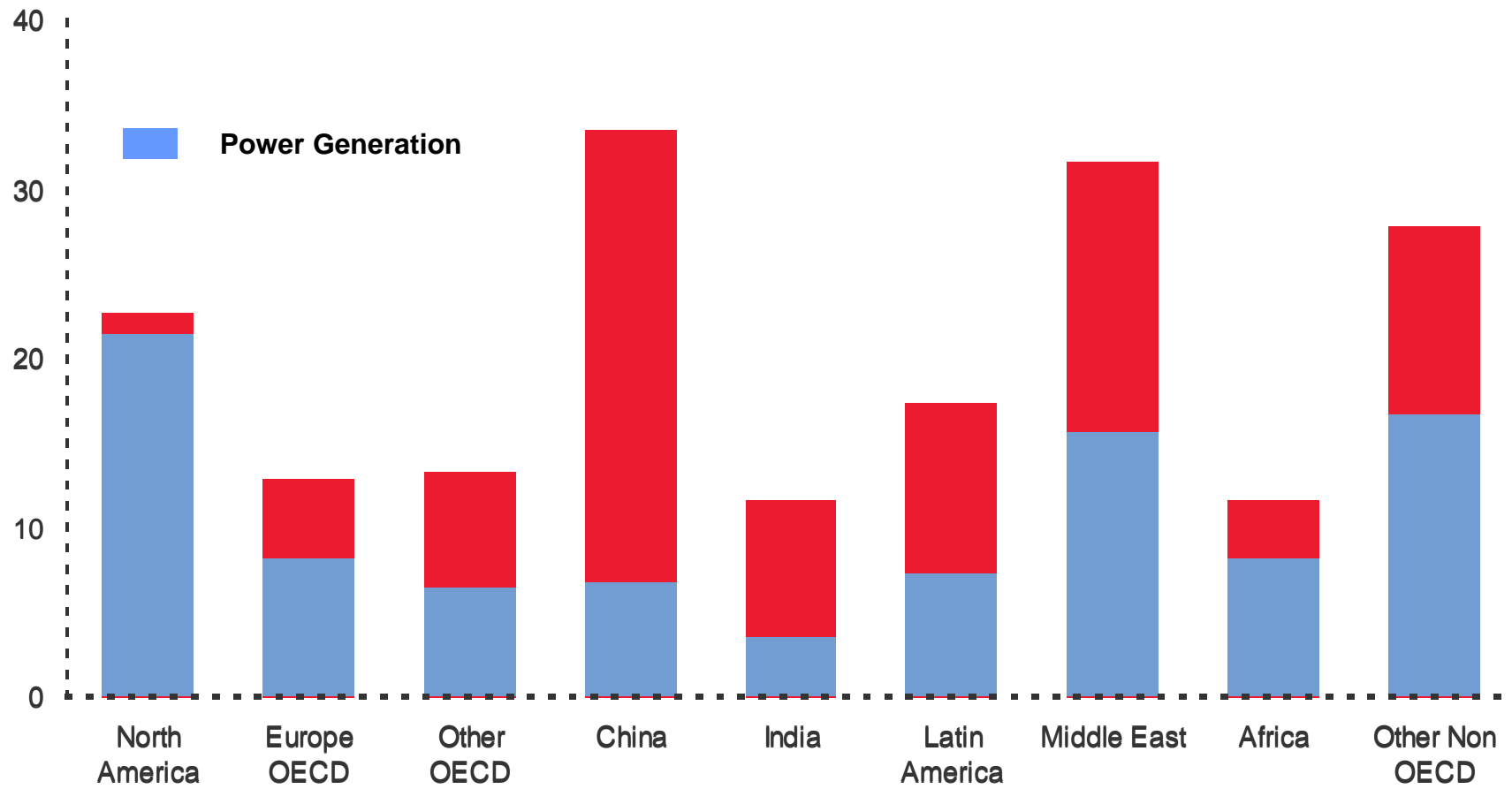


Source: ExxonMobil

# Natural Gas Demand Growth 2005 to 2030

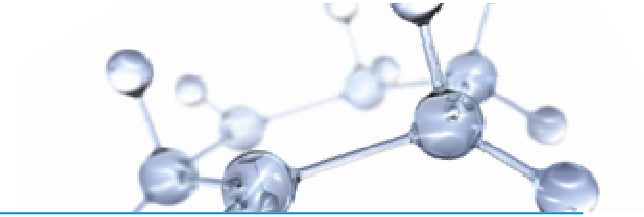


By Region & Sector  
BCFD



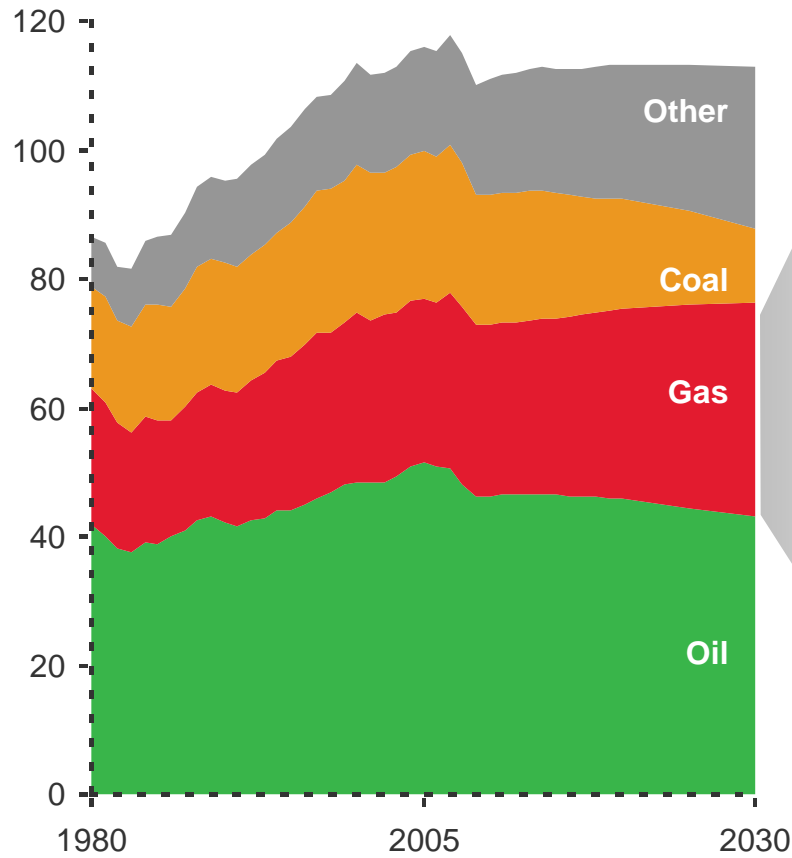
Source: ExxonMobil

# North America Natural Gas Demand



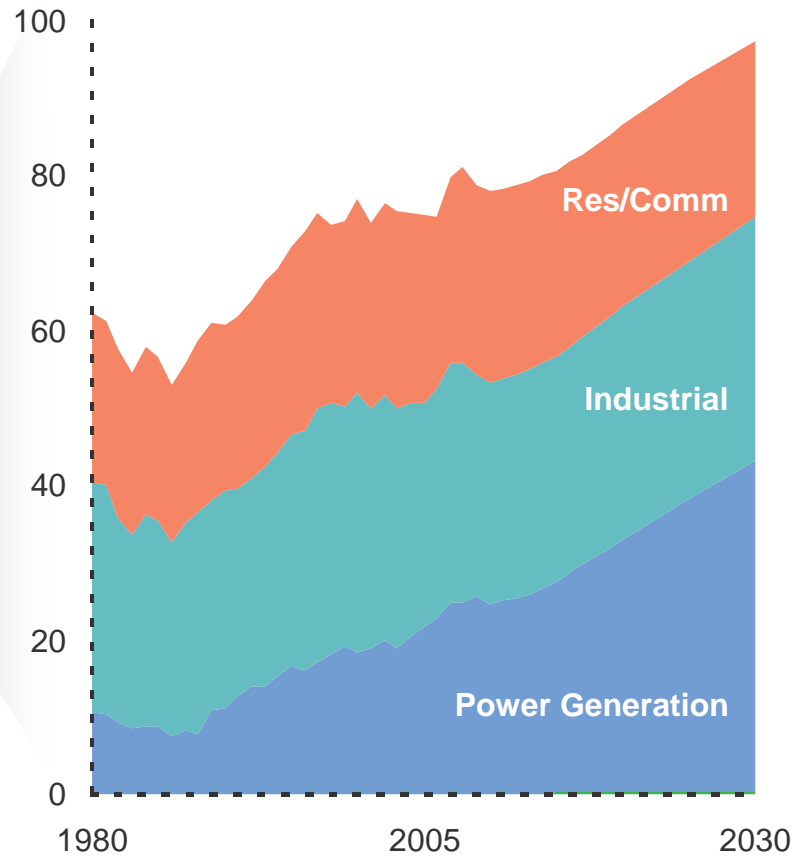
## Total Demand

Quadrillion BTUs



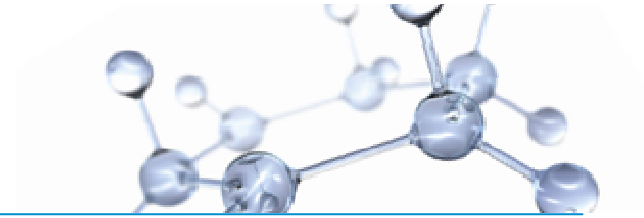
## Gas By Sector

BCFD



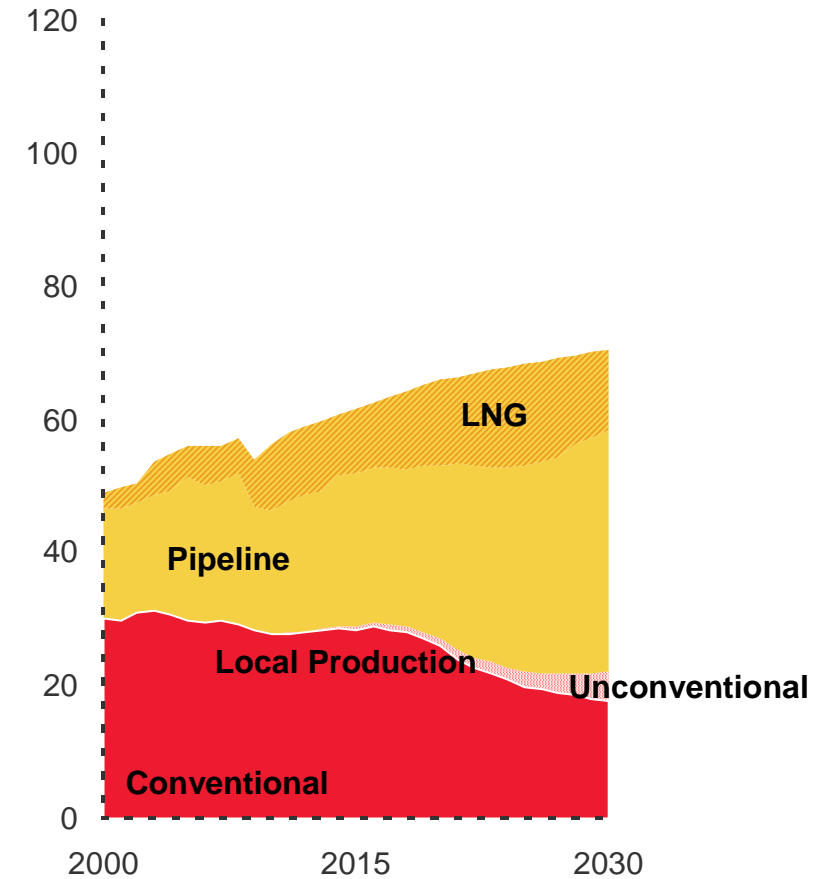
Source: ExxonMobil

## Gas Supply Grows and Diversifies



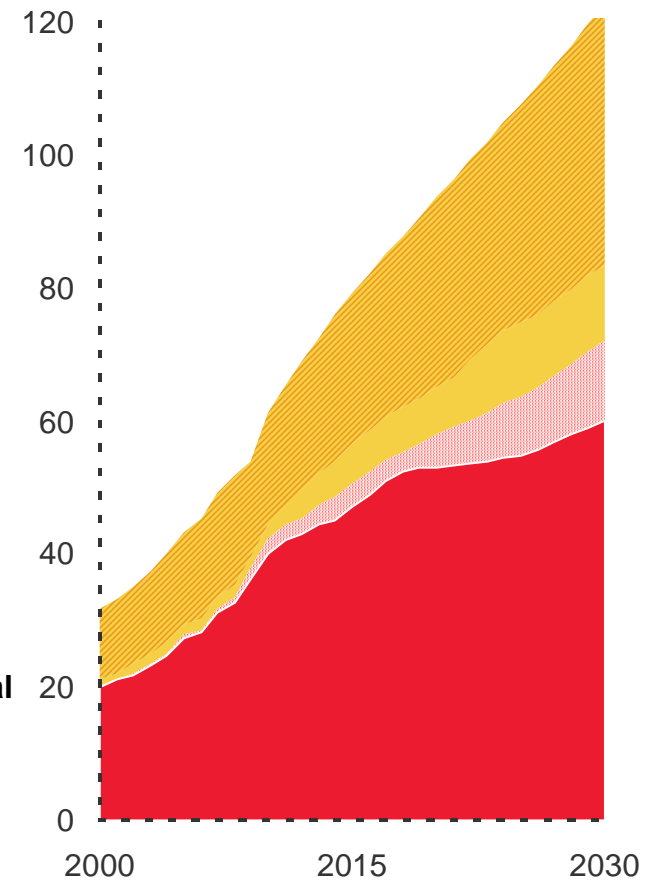
### Europe

BCFD



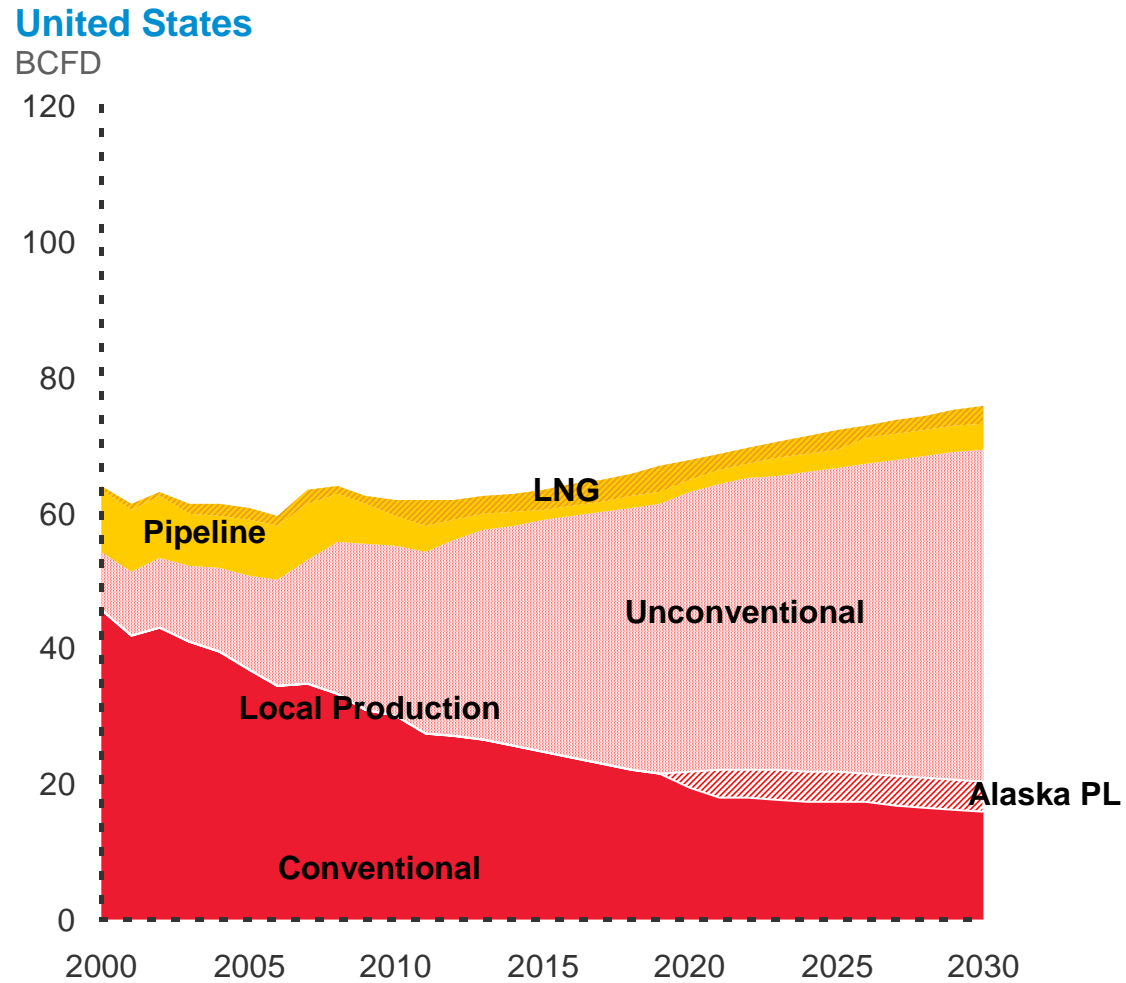
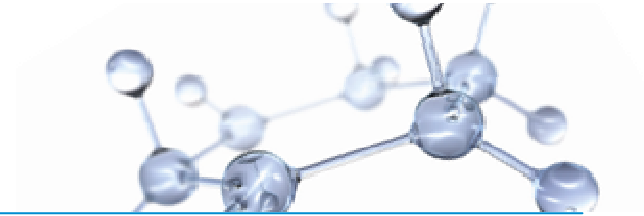
### Asia Pacific

BCFD



Source: ExxonMobil

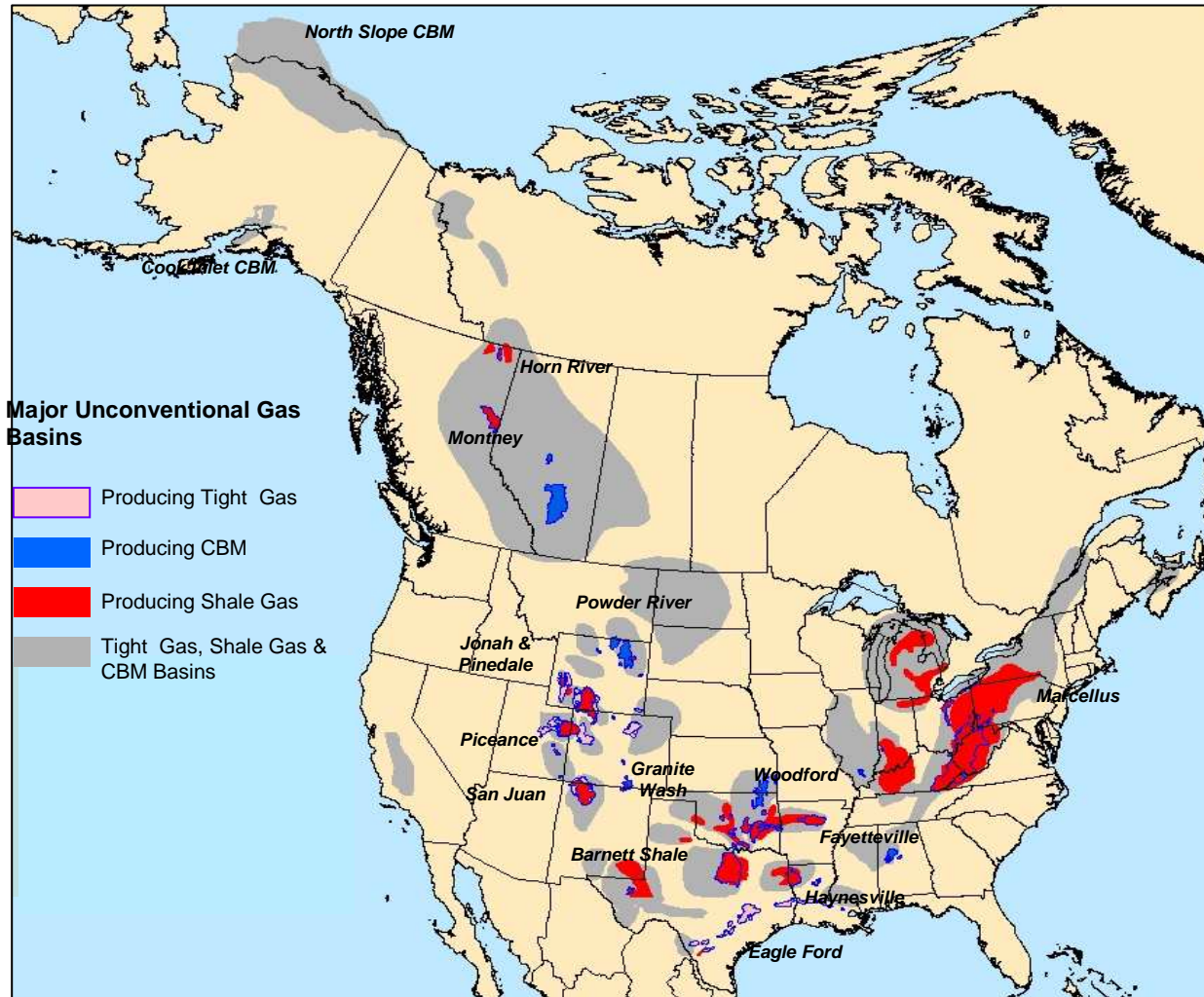
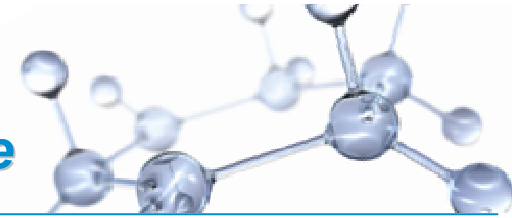
# US Gas Supply



Source: ExxonMobil



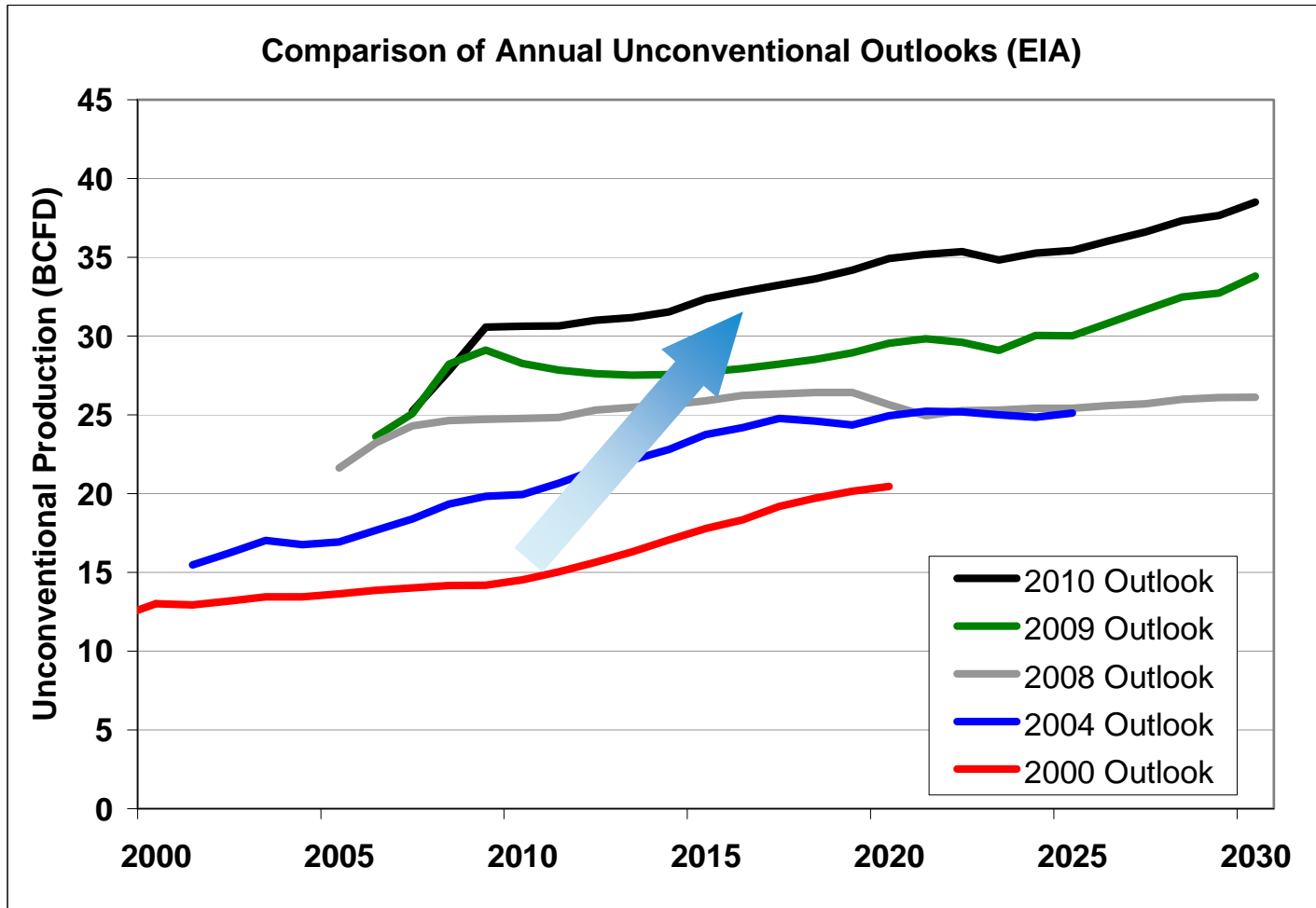
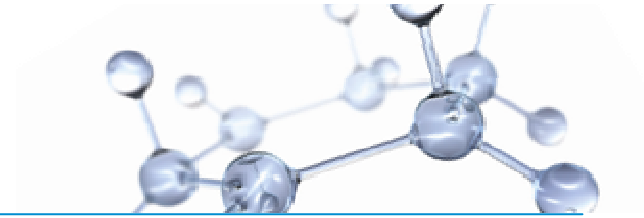
# North America Unconventional Gas Resource



- Resources for ~100 years coverage at current demand
- Unconventional gas has extended coverage 60+ years
- Further unconventional gains expected

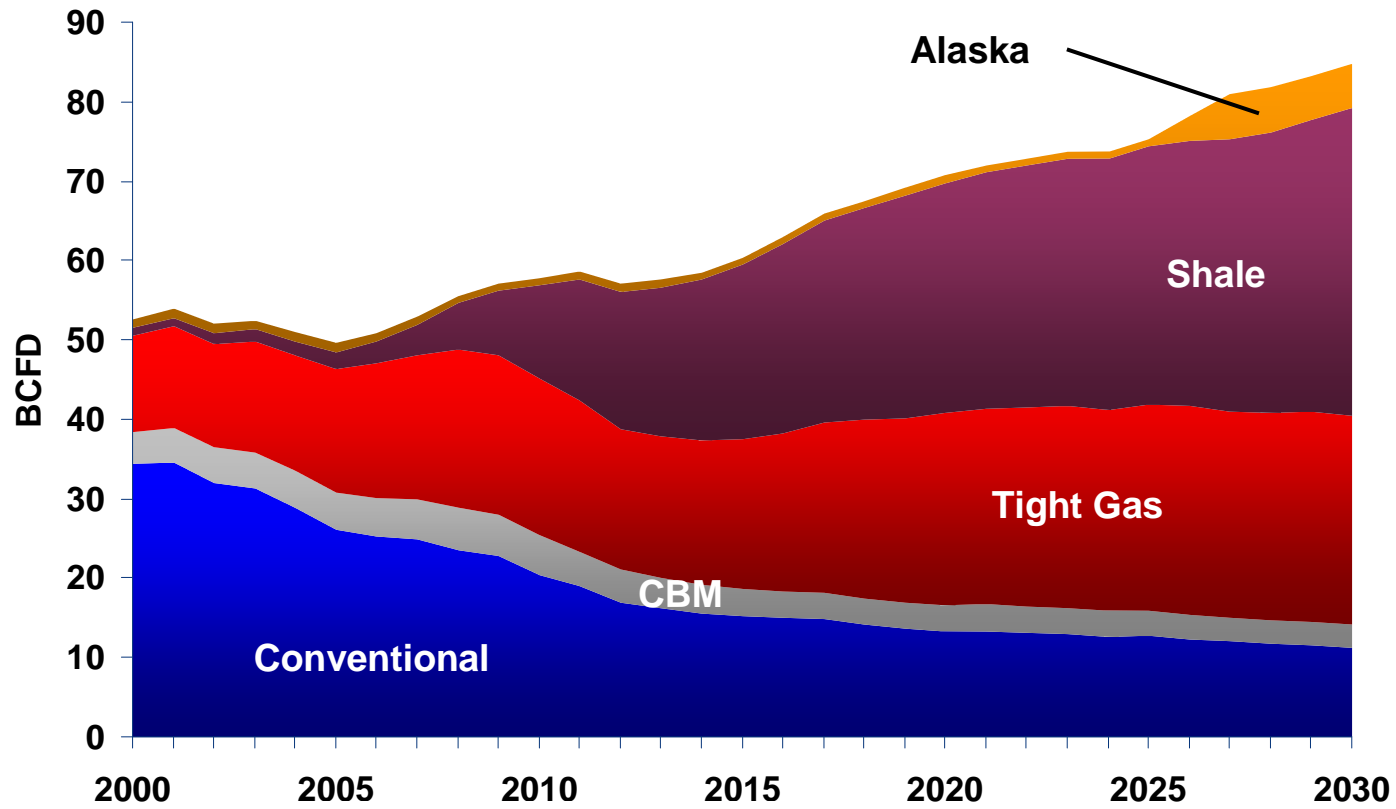
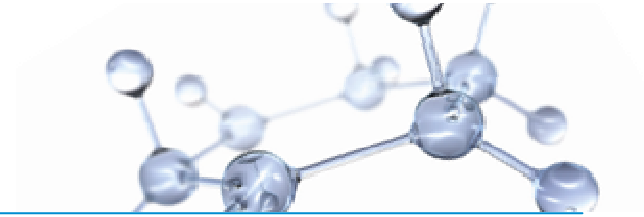
Source: ExxonMobil

## Unconventional Gas – Paradigm Change



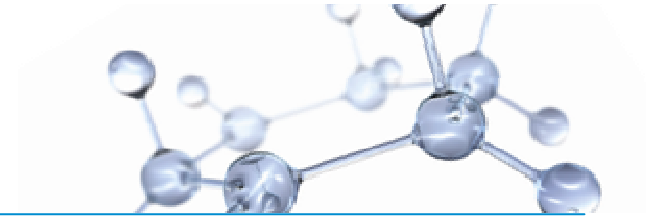
Source: EIA

# US Gas Production



Source: Wood Mackenzie

## Alaska's Opportunity



- Alaska's undeveloped natural gas resources can play a vital role in supplying Alaska and North America's future energy needs
  - Discovered resource of 35 tcf
  - Potential developments in the Beaufort and Chukchi Sea, onshore opportunities
- The decades-long time horizon associated with the large infrastructure commitments necessitates:
  - Predictable and durable fiscal terms
  - Private/public coordination
  - Project execution excellence
- Undeveloped prospects can fuel the Alaska economy for decades





**Thank You!**

