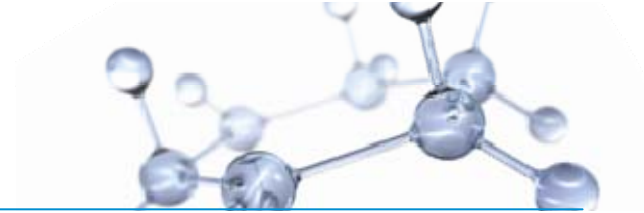


The Outlook for Energy

a view to 2030

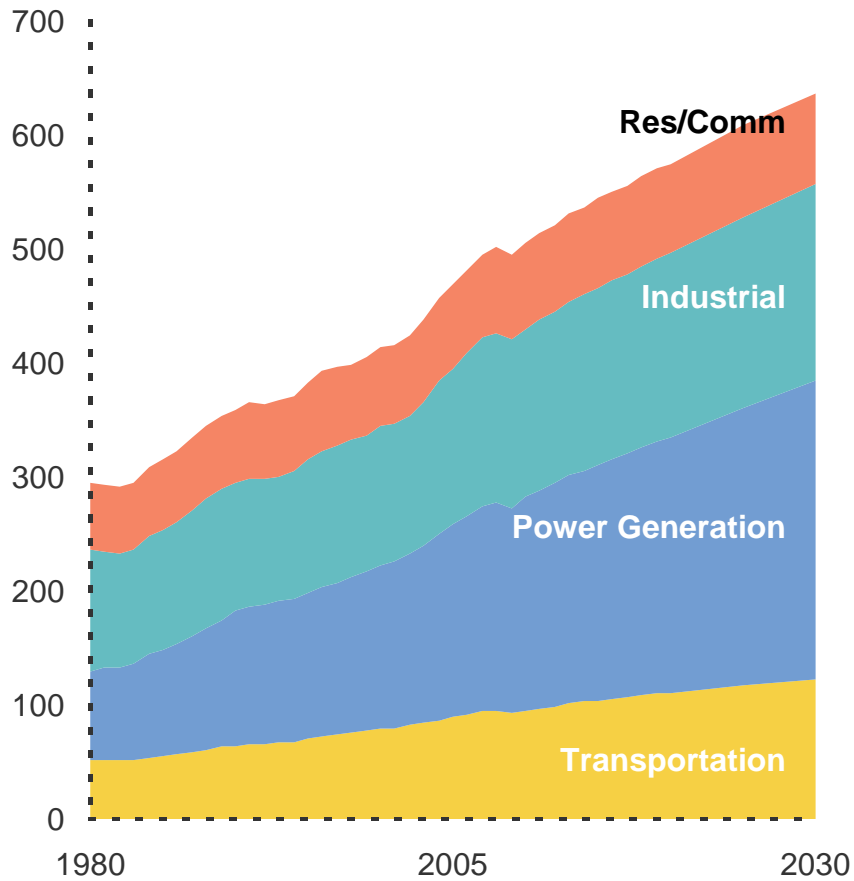
July 2011

Global Demand



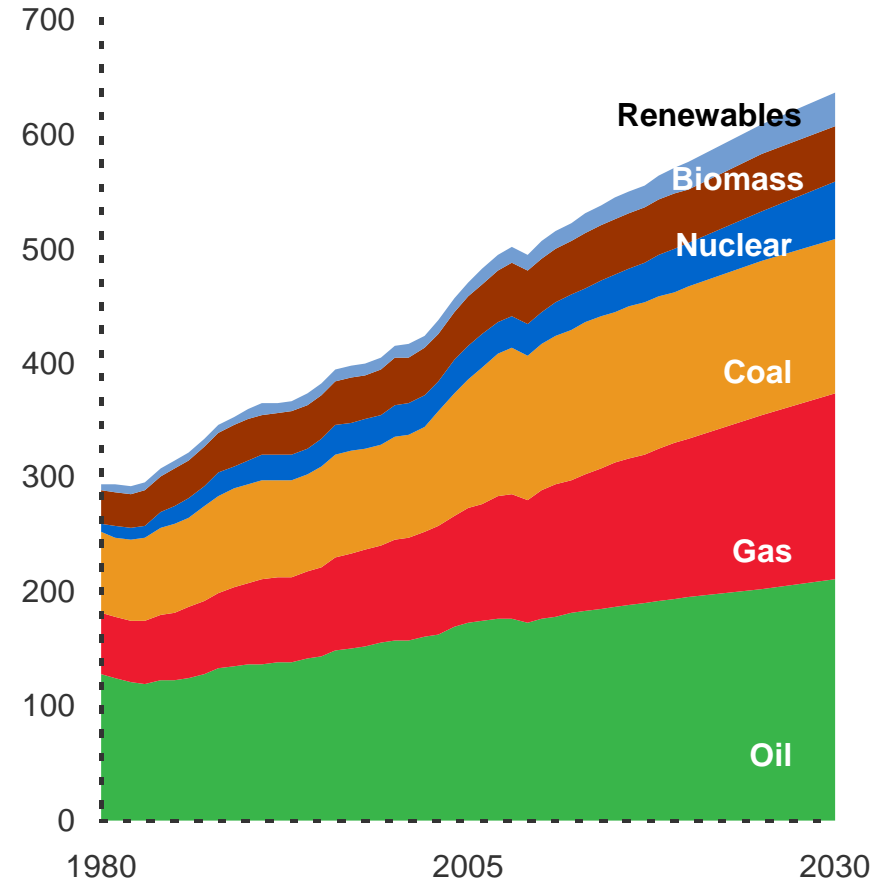
By Sector

Quadrillion BTUs

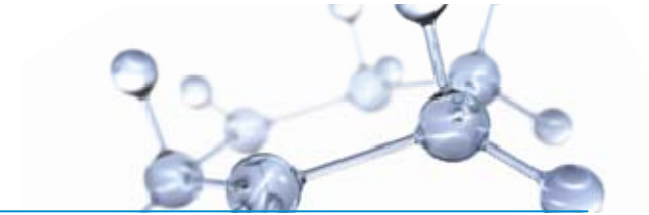


By Fuel

Quadrillion BTUs

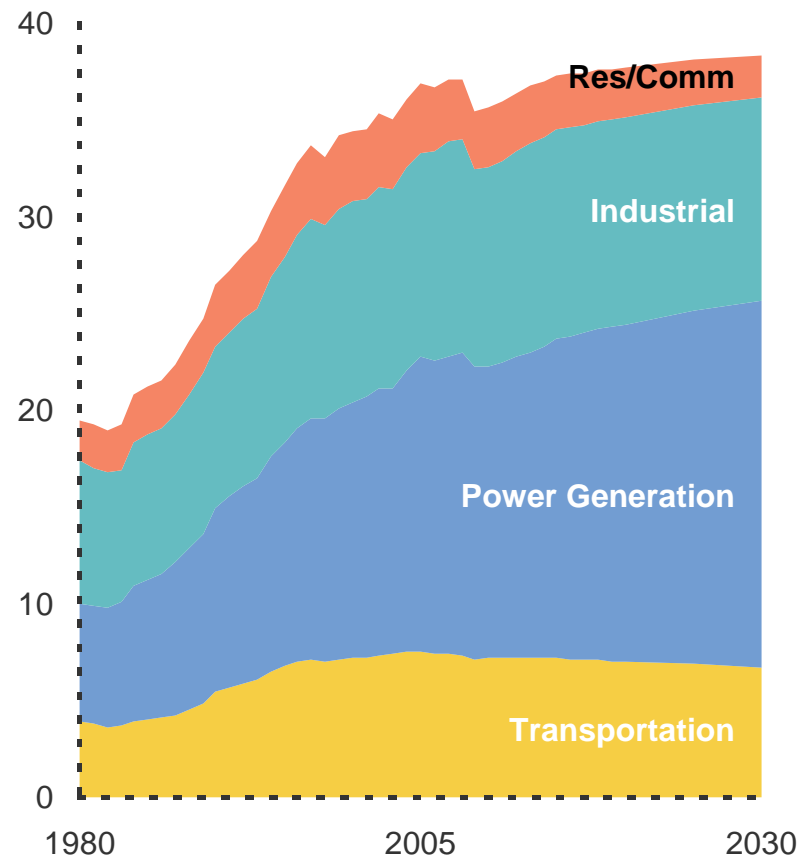


Asia Pacific OECD Energy Demand



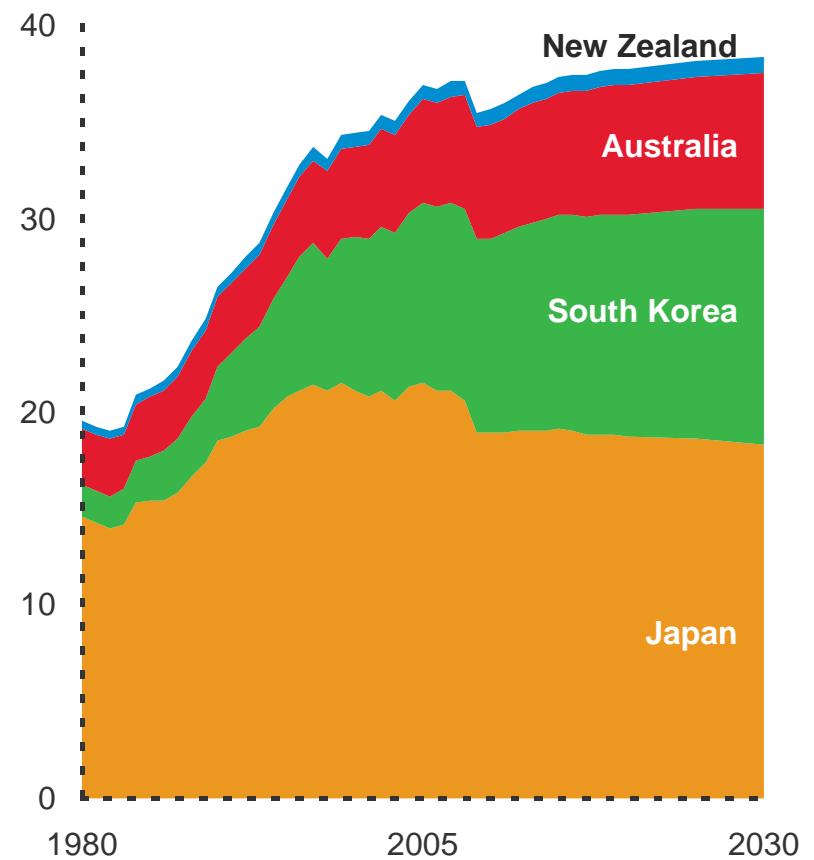
By Sector

Quadrillion BTUs

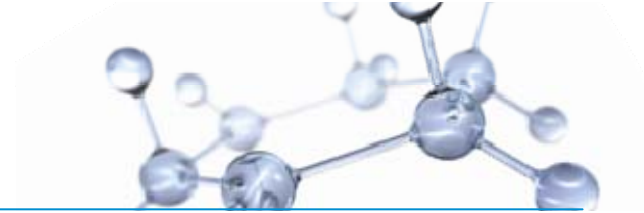


By Region

Quadrillion BTUs

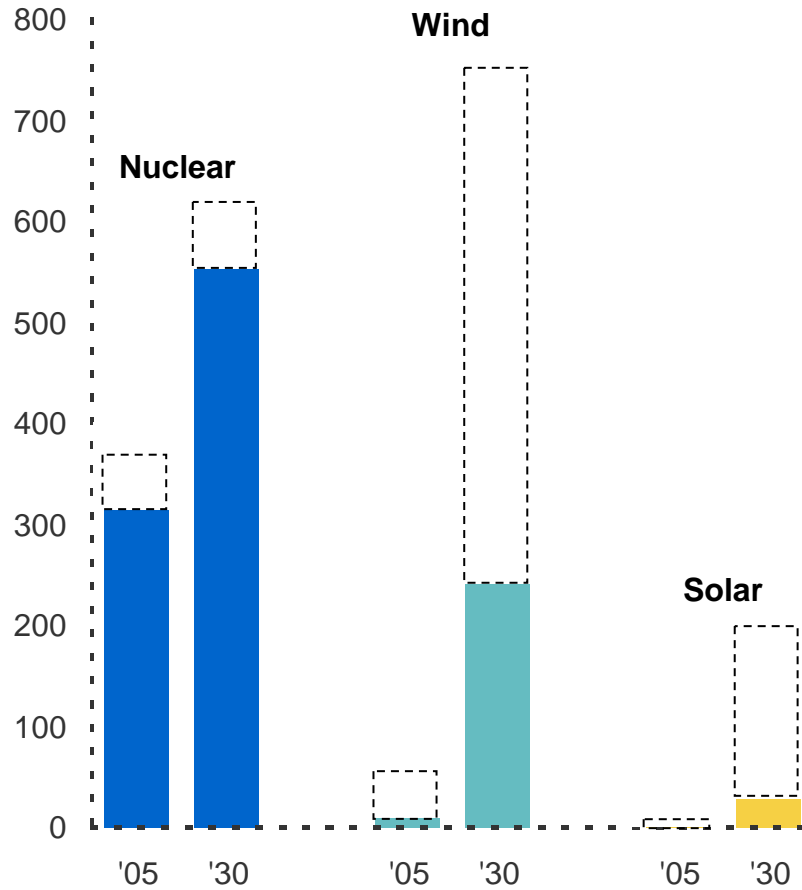


Power Generation Mix Evolves



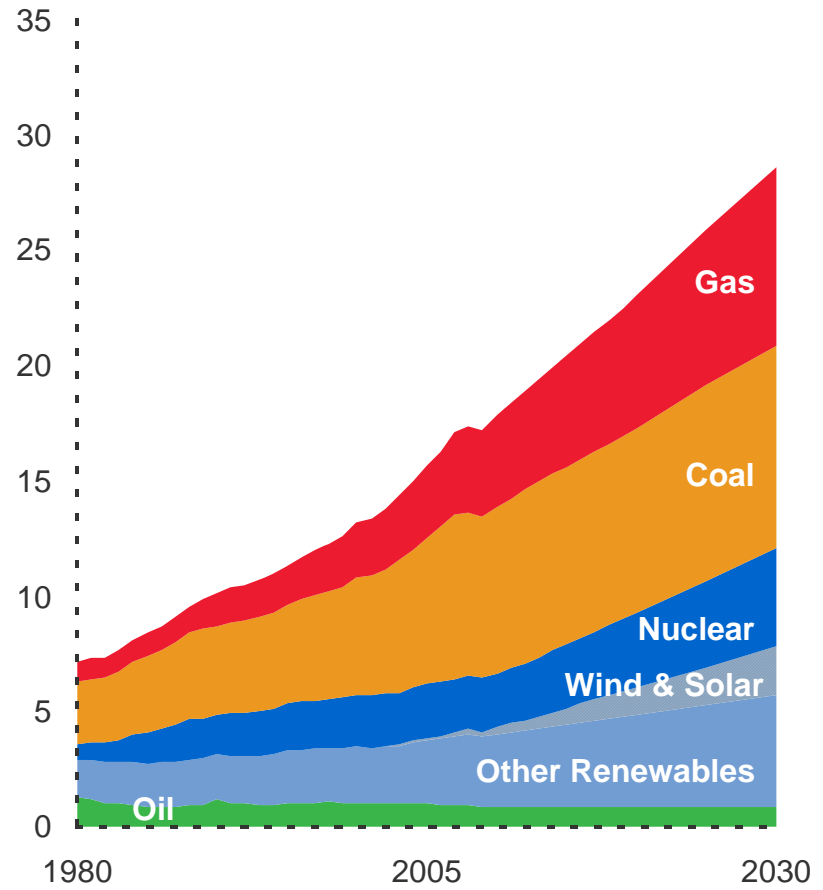
Global Capacity Utilized

GW

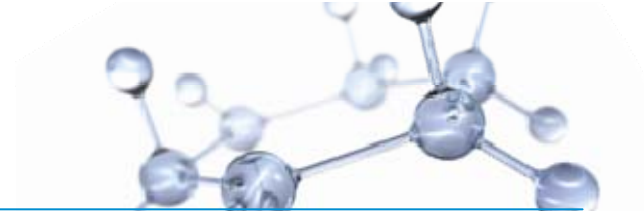


By Generation

k TWh

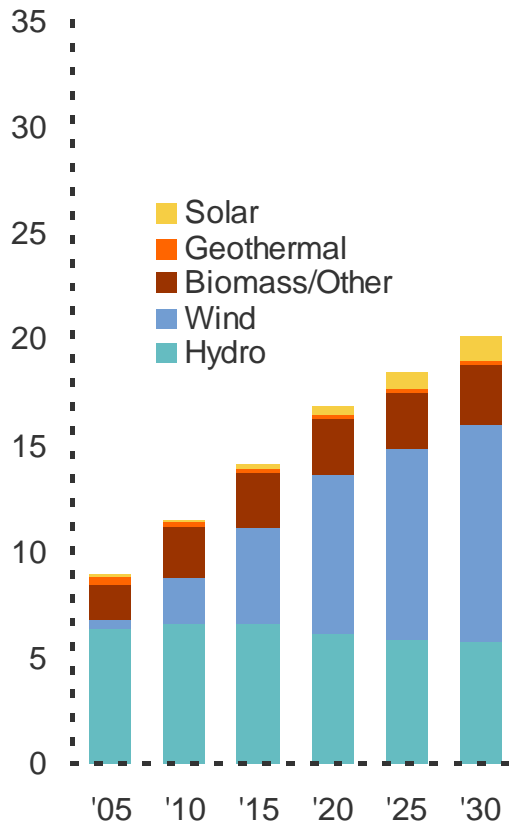


Renewables Gain Share



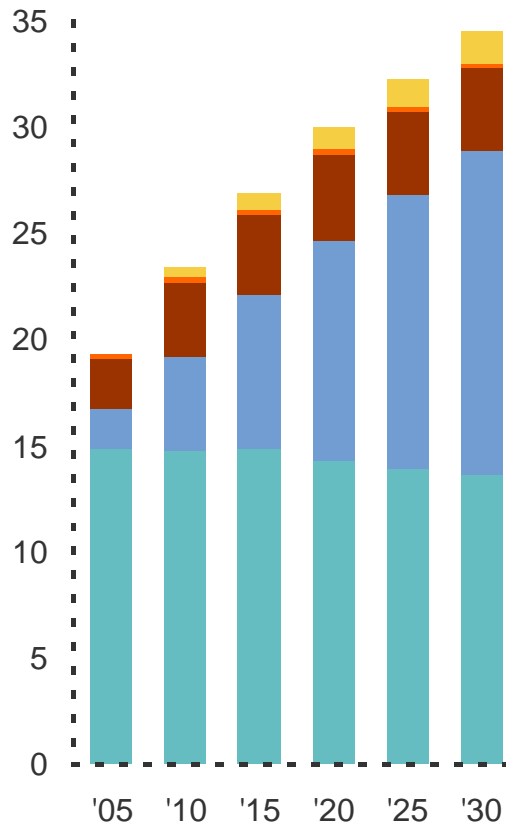
United States

Percent of TWhr



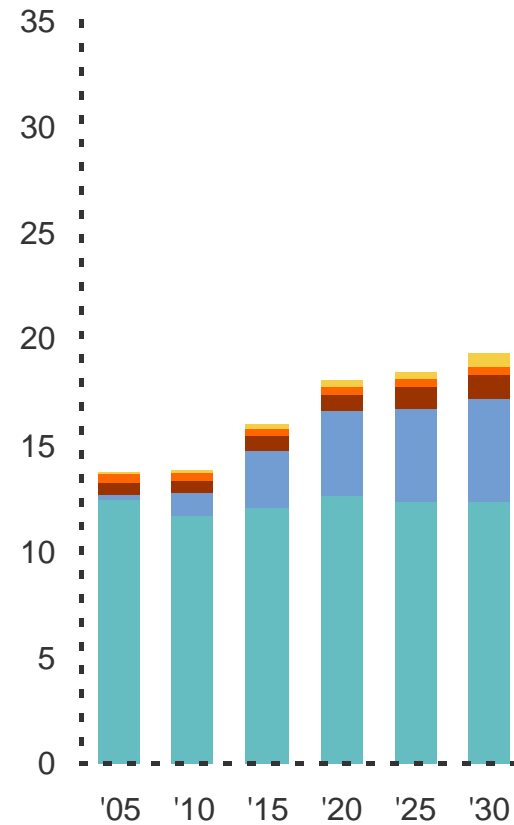
Europe

Percent of TWhr



Asia Pacific

Percent of TWhr



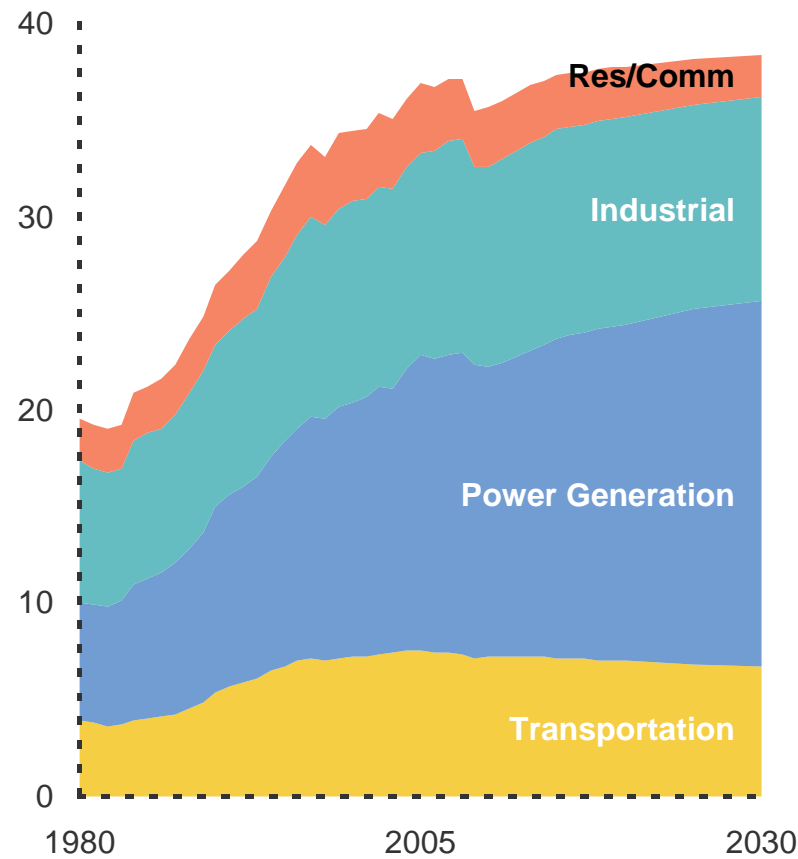
*Biomass includes Municipal Solid Waste

Asia Pacific OECD Energy Demand & Supply



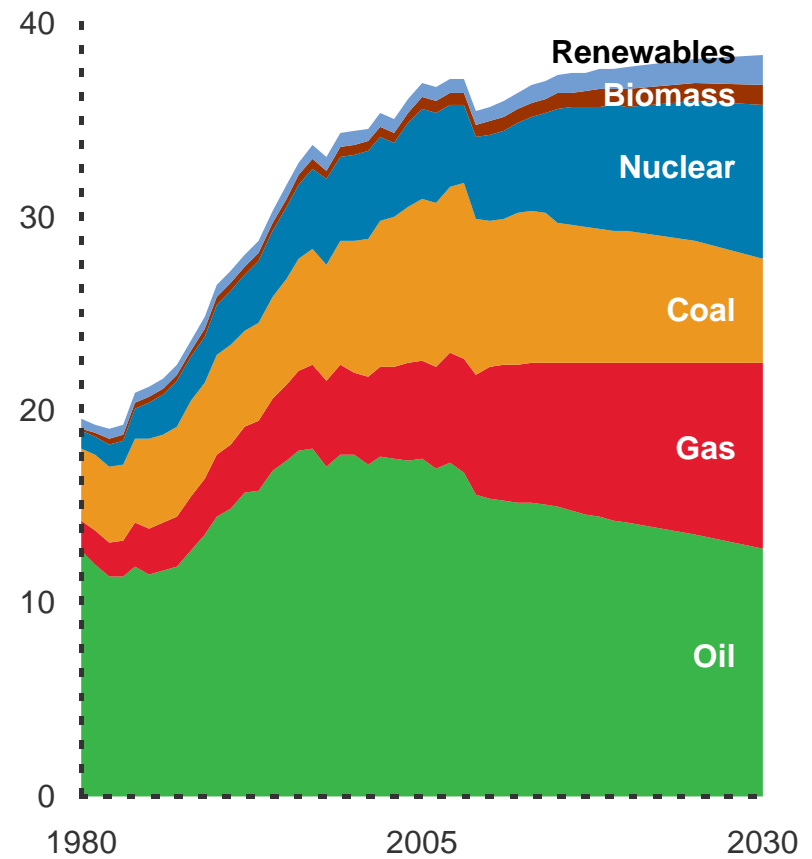
By Sector

Quadrillion BTUs

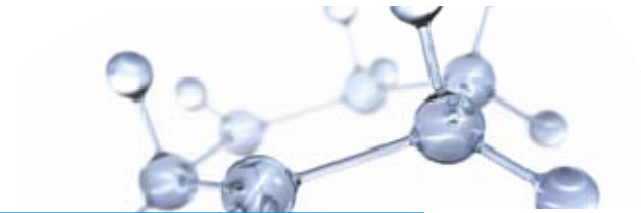


By Fuel

Quadrillion BTUs

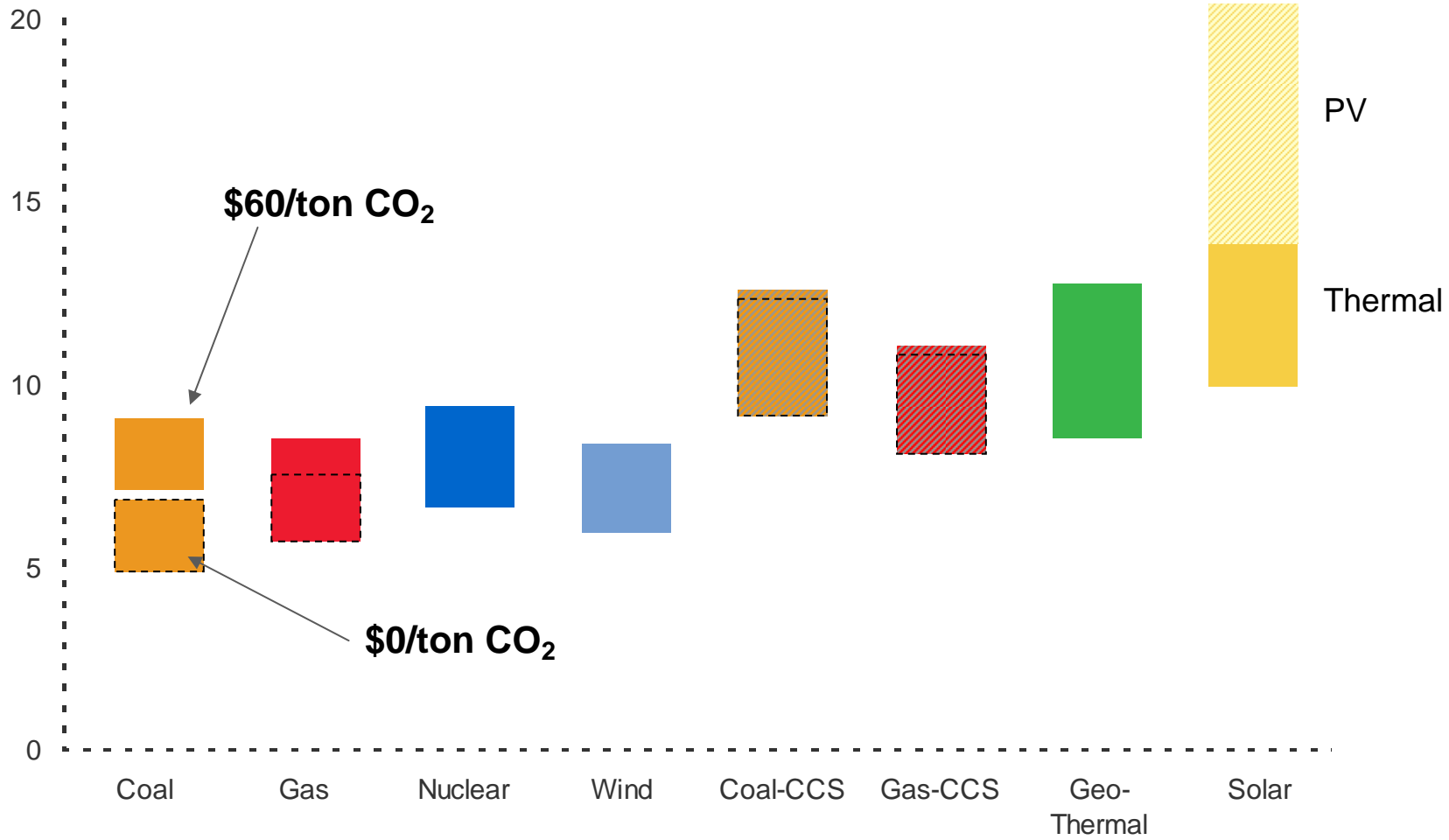


Economic Choices for U.S. Power



Baseload, Startup 2025

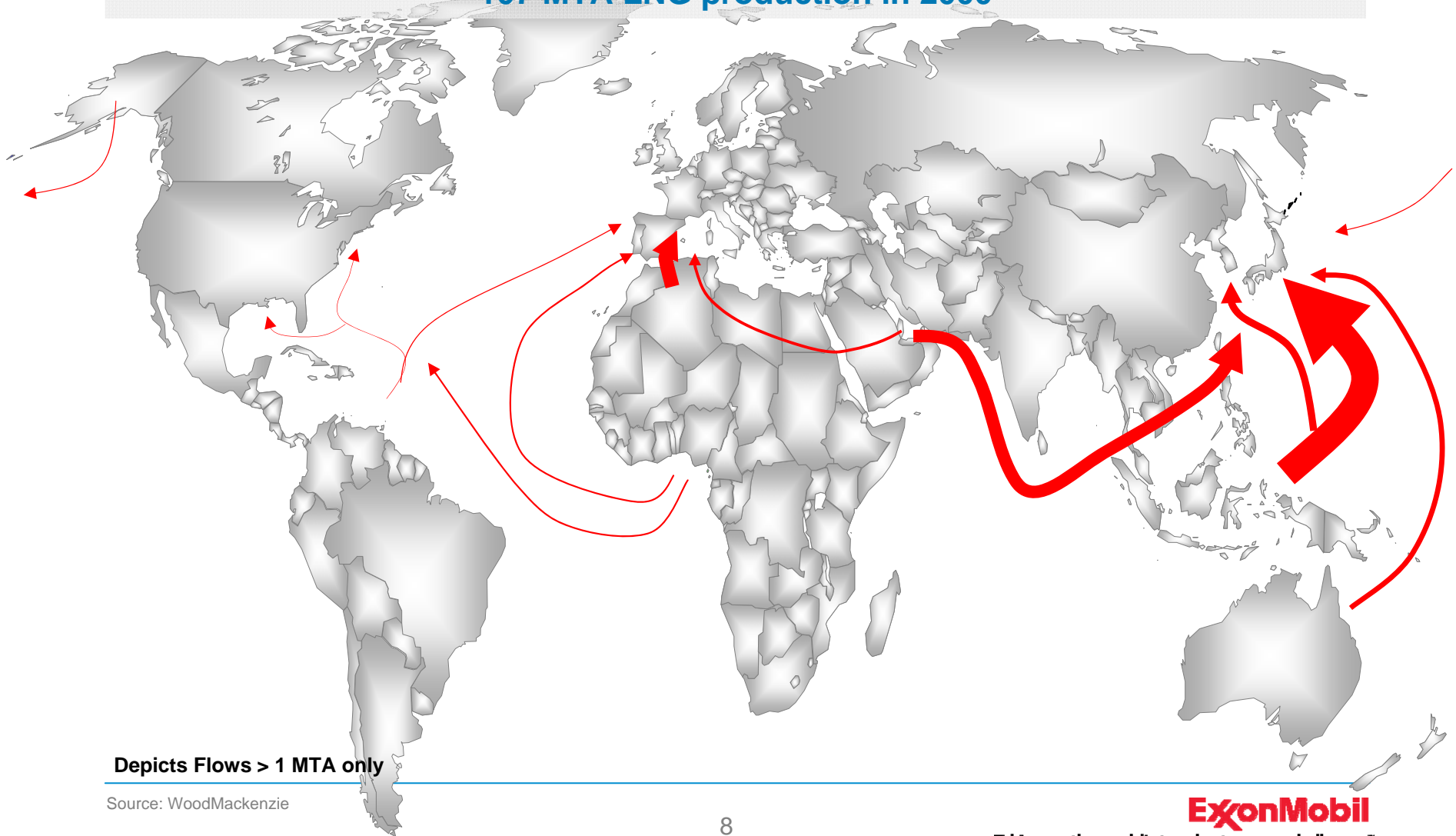
2010 cents/kWh



A Decade of Growth – 2000



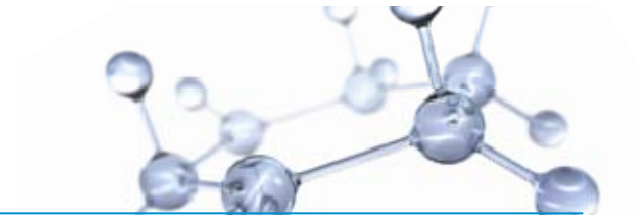
107 MTA LNG production in 2000



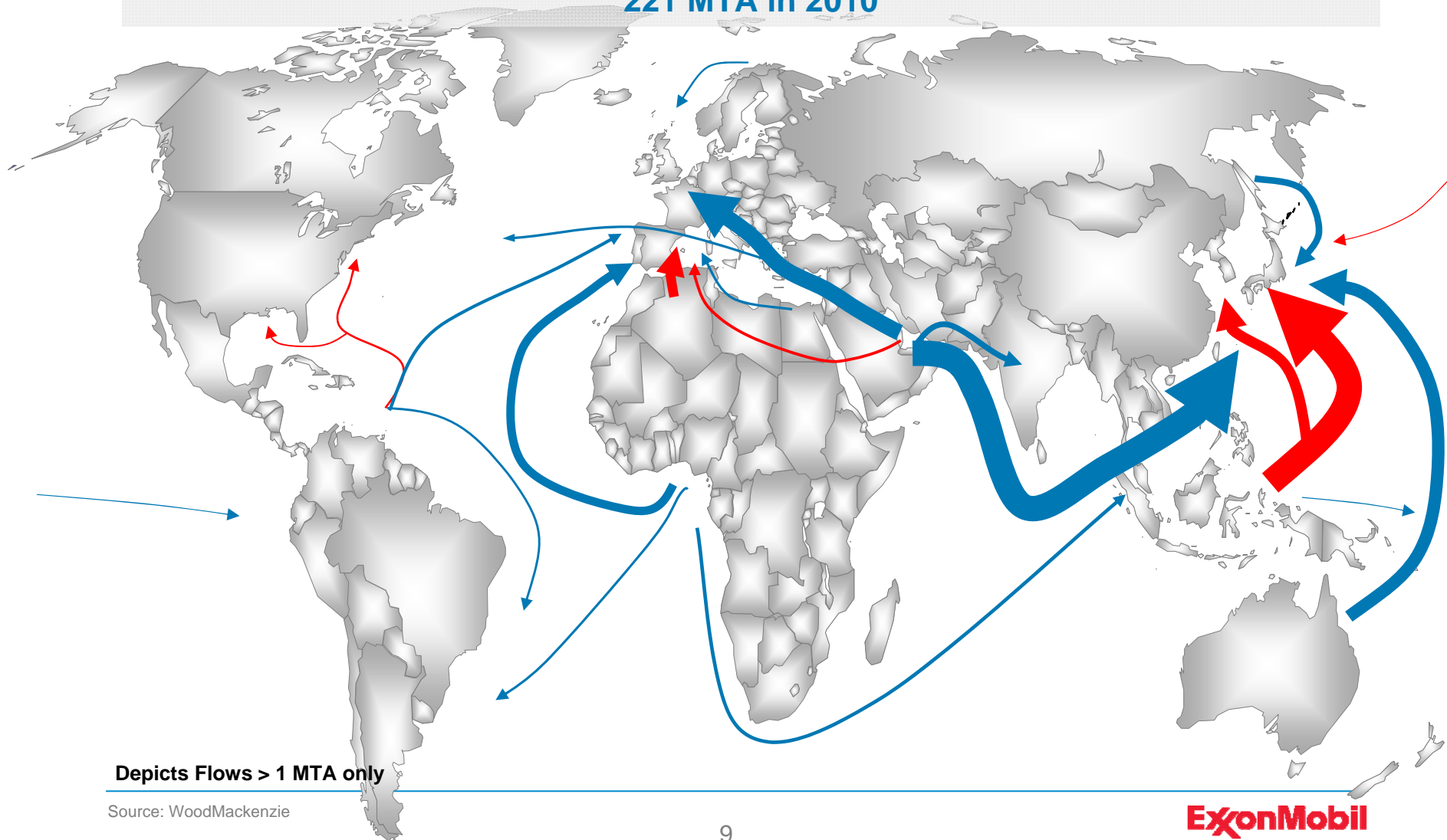
Depicts Flows > 1 MTA only

Source: WoodMackenzie

A Decade of Growth – 2010



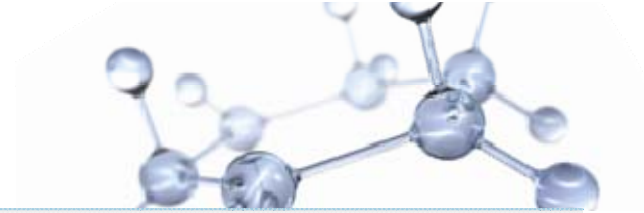
221 MTA in 2010



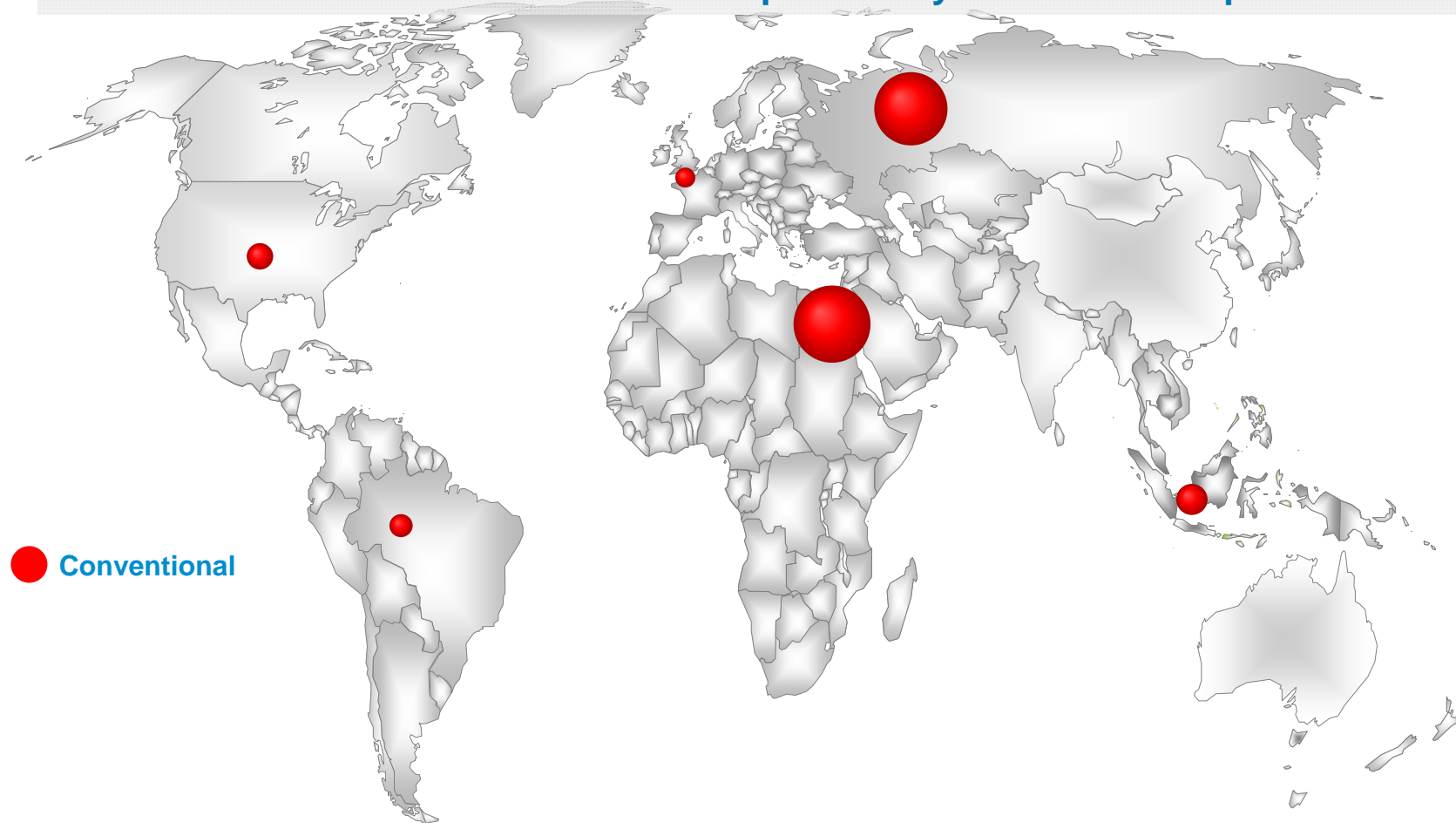
Depicts Flows > 1 MTA only

Source: WoodMackenzie

Gas Resources in 2000



Combined resources of 145 tcm are equal to 60 years of current production

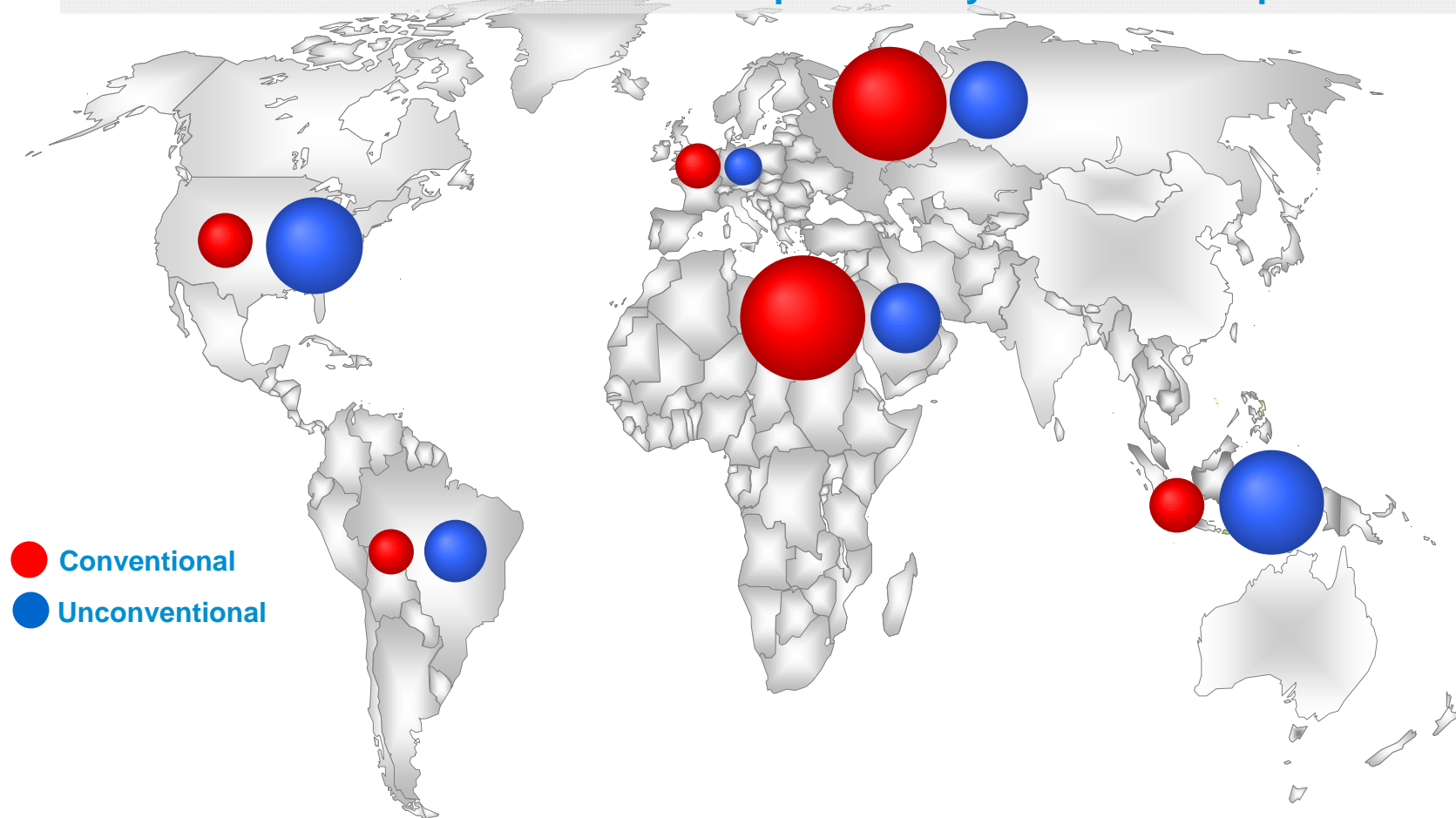


Source: IEA 1999 World Outlook

Gas Resources in 2010

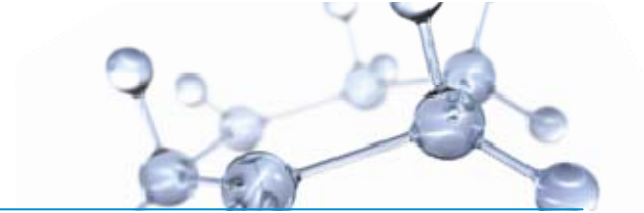


Combined resources of 785 tcm are equal to 250 years of current production



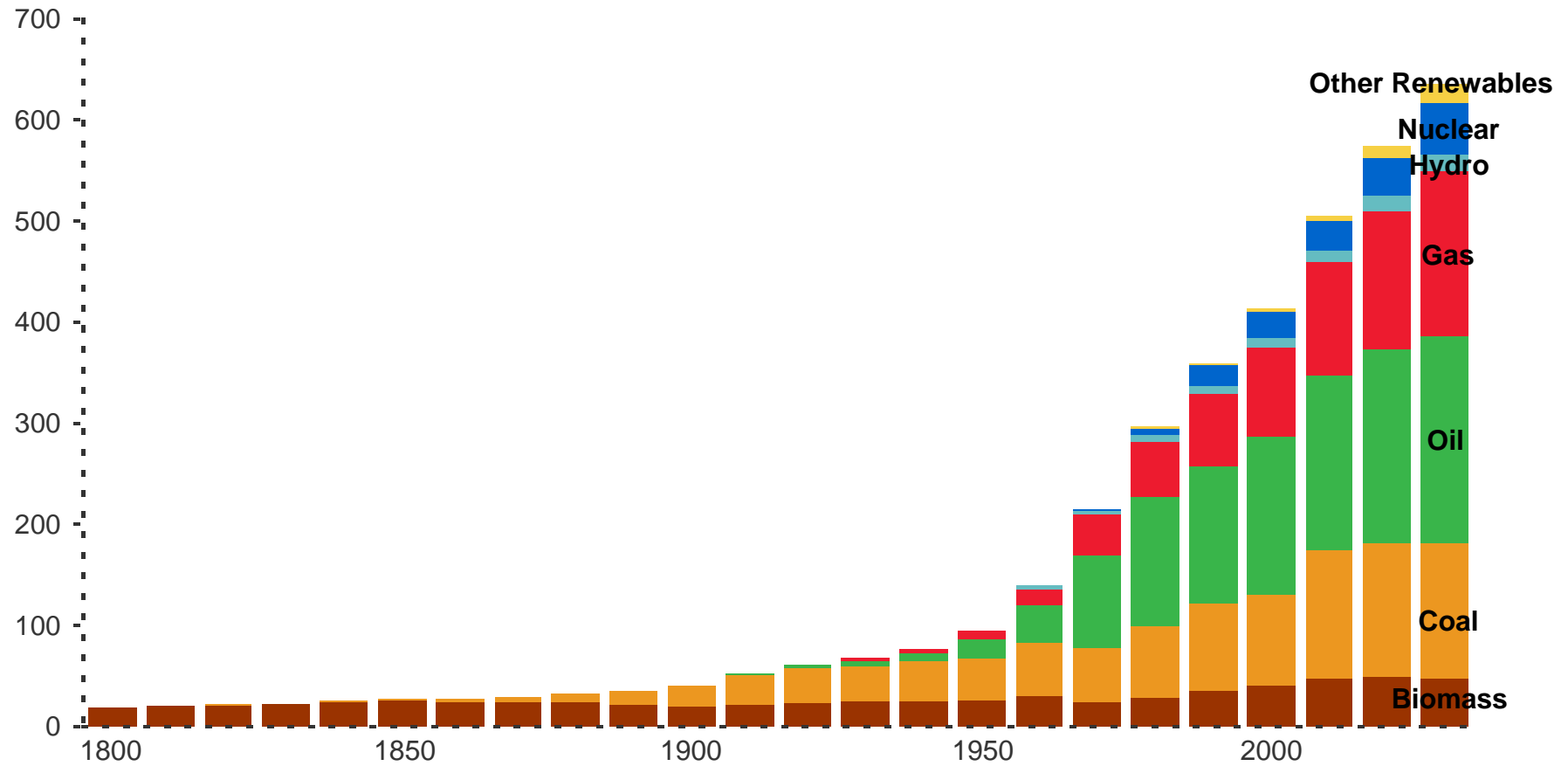
Source: IEA 2009 World Outlook

Economic and Energy Evolution

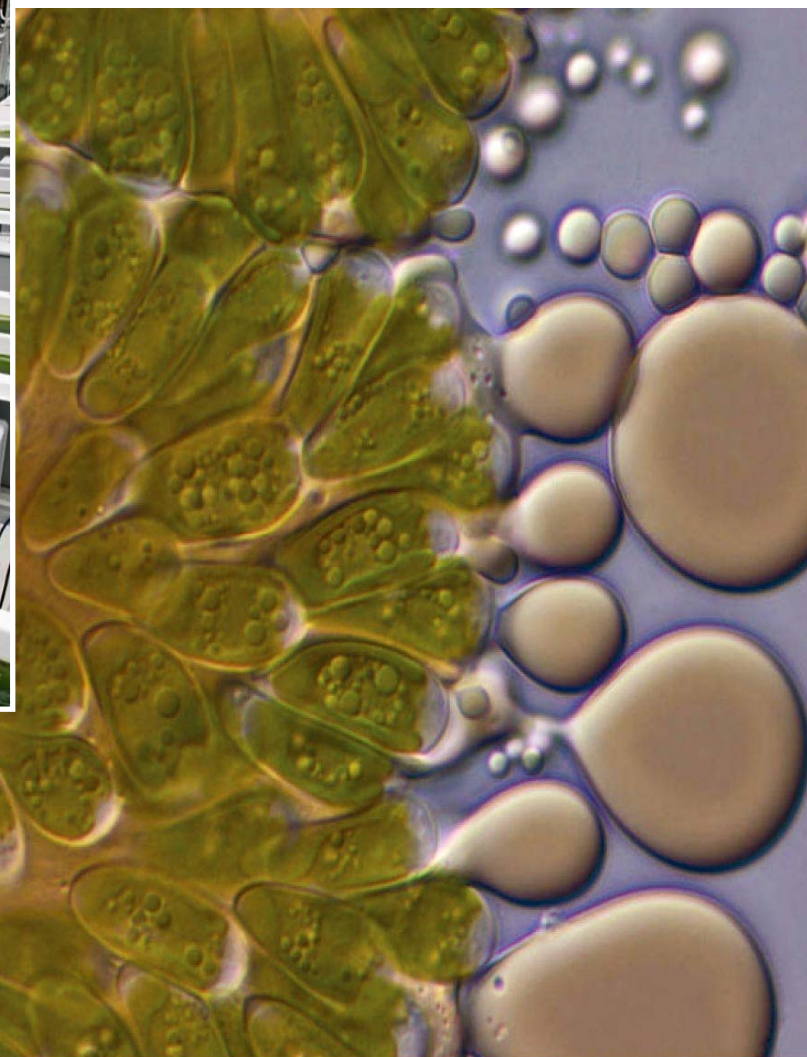
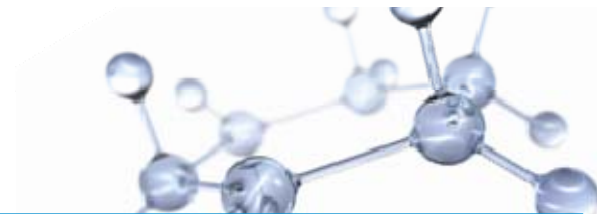


Global Demand By Fuel

Quadrillion BTUs



Algae Biofuels



Source: ExxonMobil