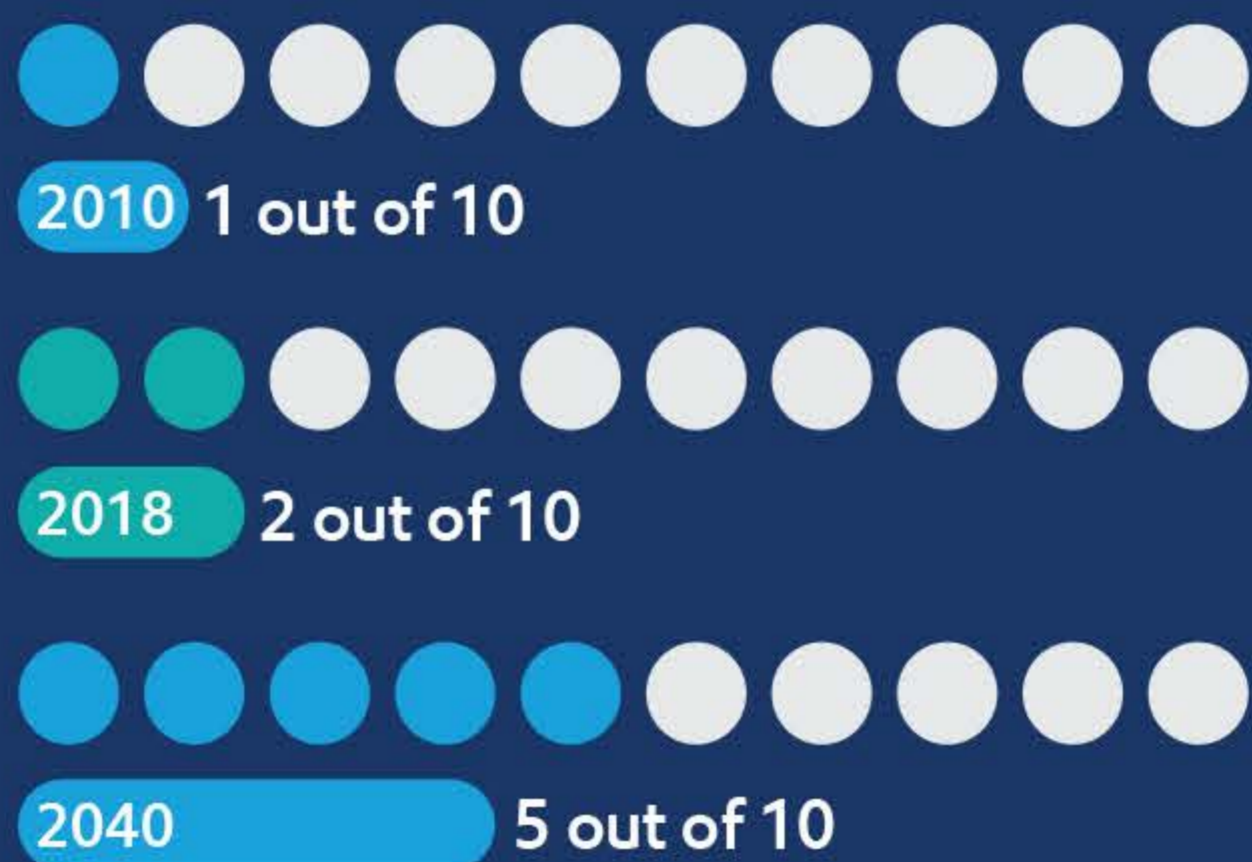


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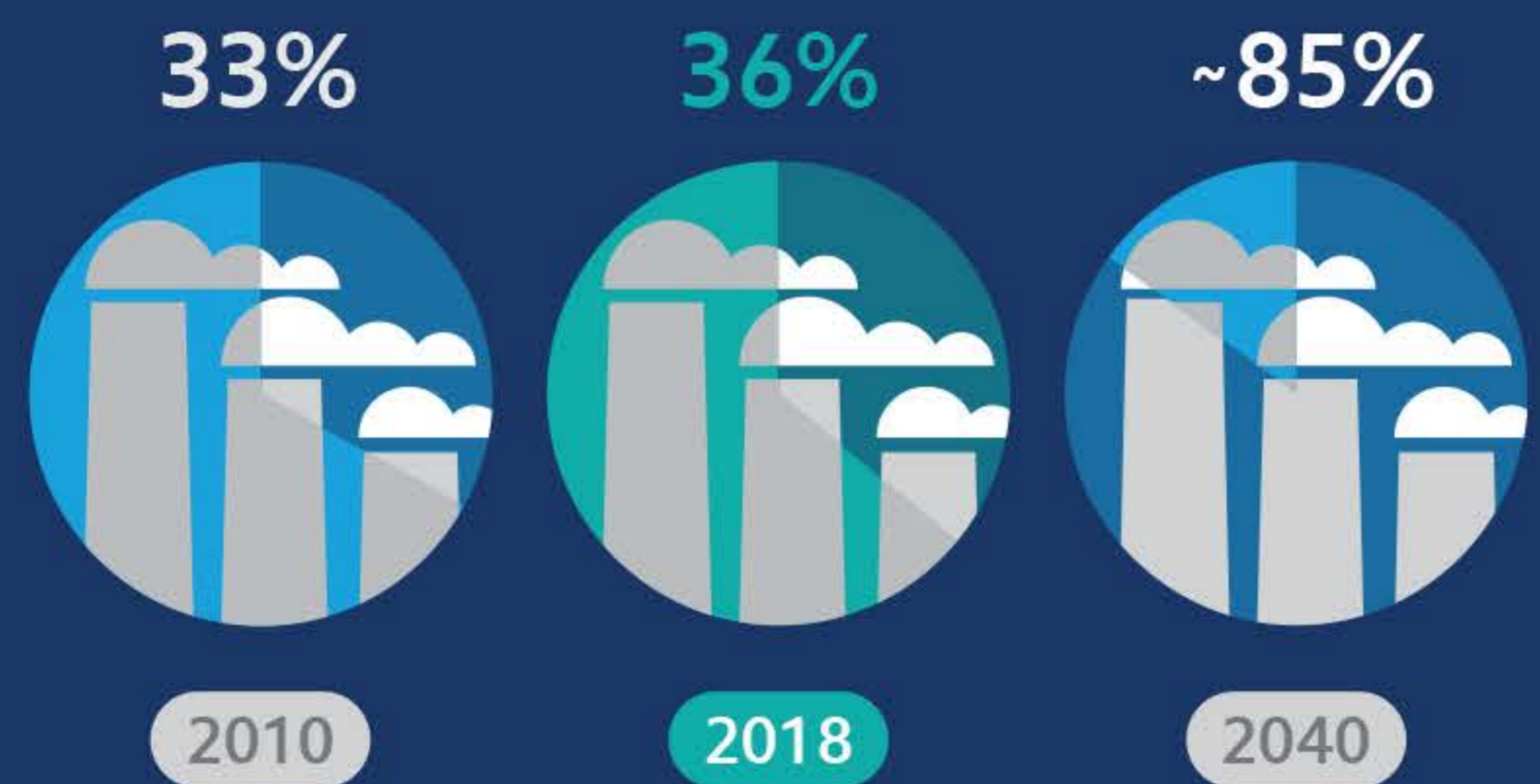
Indicators for a 2°C pathway

Continued transition of the energy system will provide important indicators on whether society is successfully moving toward a 2°C scenario. The following illustrates the progress made from 2010 to 2018 toward that objective by 2040.

Renewables, nuclear and fossil fuels with CCS rise to ~50% of primary energy demand⁽¹⁵⁾



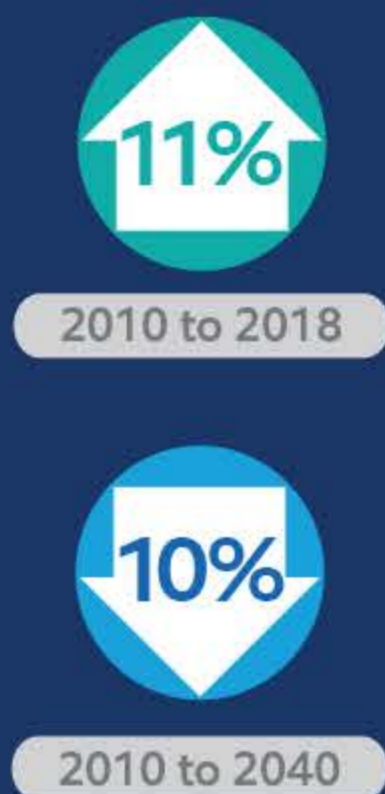
Low-carbon power generation (including CCS) grows to ~85% of total supply⁽¹⁶⁾



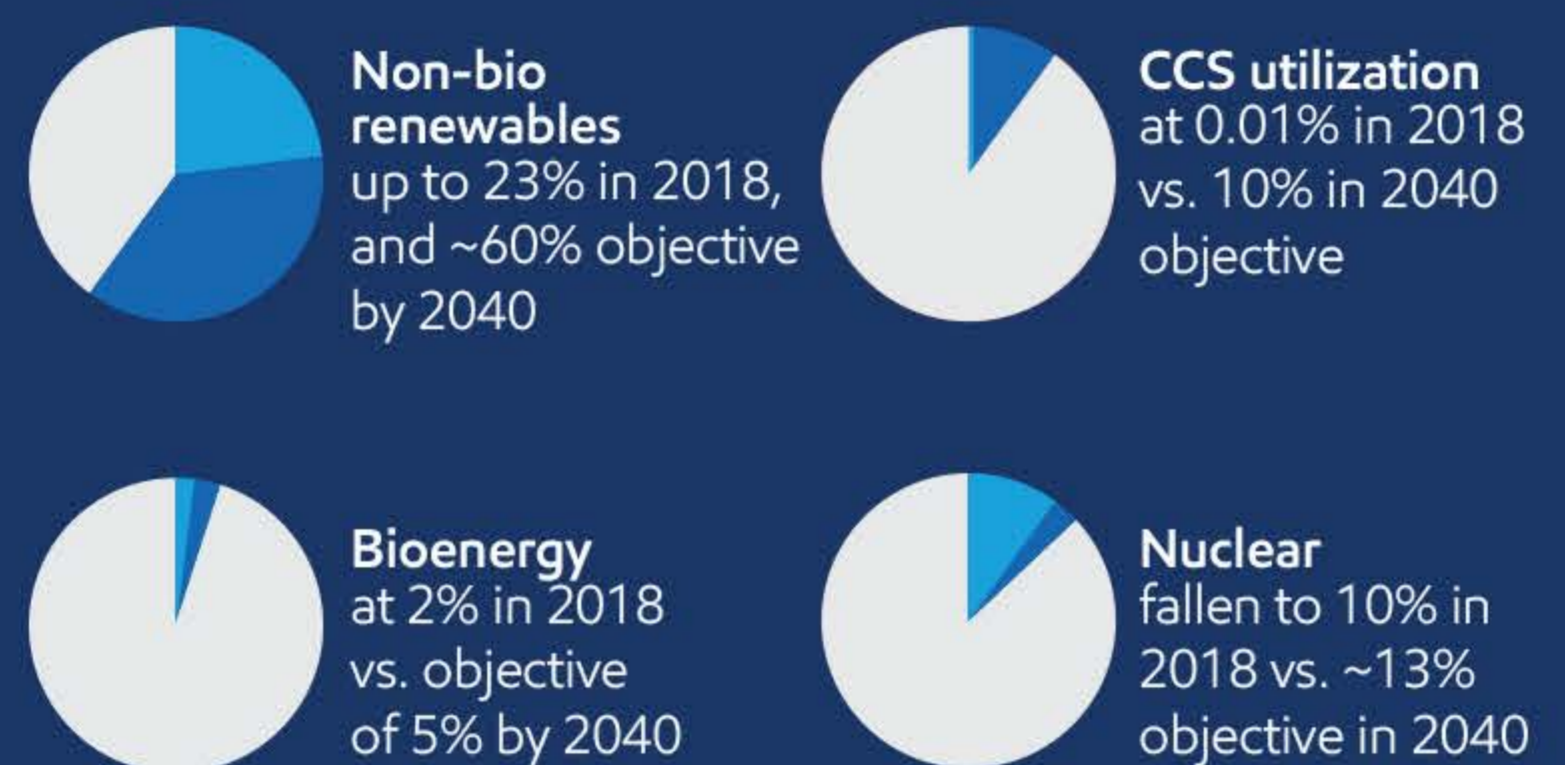
Increased electrification of energy demand⁽¹⁷⁾



Oil demand falls⁽¹⁸⁾



Global electricity generation shifts⁽¹⁹⁾



Summary of demand growth rates	Average of the IPCC Lower 2°C ⁽¹⁹⁾	ExxonMobil 2019 Outlook for Energy	IEA World Energy Outlook 2010-2019	Annual reduction carbon intensity/GDP ⁽²⁰⁾
Mean annual demand growth rate 2010-2040				(monitoring implementation of Paris Agreement)
Energy demand	▲ 0.3%	▲ 0.9%	▲ 1.3%	7.7% Needed to stay within 2°C global carbon budget
Oil	▼ (0.5)%	▲ 0.8%	▲ 1.1%	
Natural gas	▼ (0.1)%	▲ 1.4%	▲ 2.2%	
Coal	▼ (4.5)%	▼ (0.2)%	▲ 0.4%	
Nuclear	▲ 2.5%	▲ 1.5%	▲ 0.1%	
Bioenergy	▲ 2.3%	▲ 0.8%	▲ 1.3%	
Non-bio renewables	▲ 6.9%	▲ 4.1%	▲ 6.0%	

The 2018 progress is based on ExxonMobil 2019 analysis; the 2040 targets are derived from the IPCC Lower 2°C scenarios.