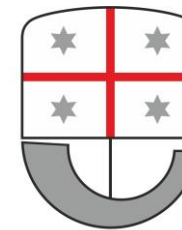




The European House
Ambrosetti



REGIONE LIGURIA

LIGURIA 2030

Genova, Palazzo Ducale - 12 luglio 2022

Sesta edizione

PRESENTAZIONE DI GIOVANNI MURANO



Camera di Commercio
Genova

Camera di Commercio
Riviere di Liguria
Imperia La Spezia Savona



1921
2021



Ignazio Messina & C.

LIGURIA 2030

Genova, 12 luglio 2022

Energy lives here™

Ing. Giovanni Murano
Presidente Esso Italiana

Esso Italiana: una presenza storica e strategica in Liguria

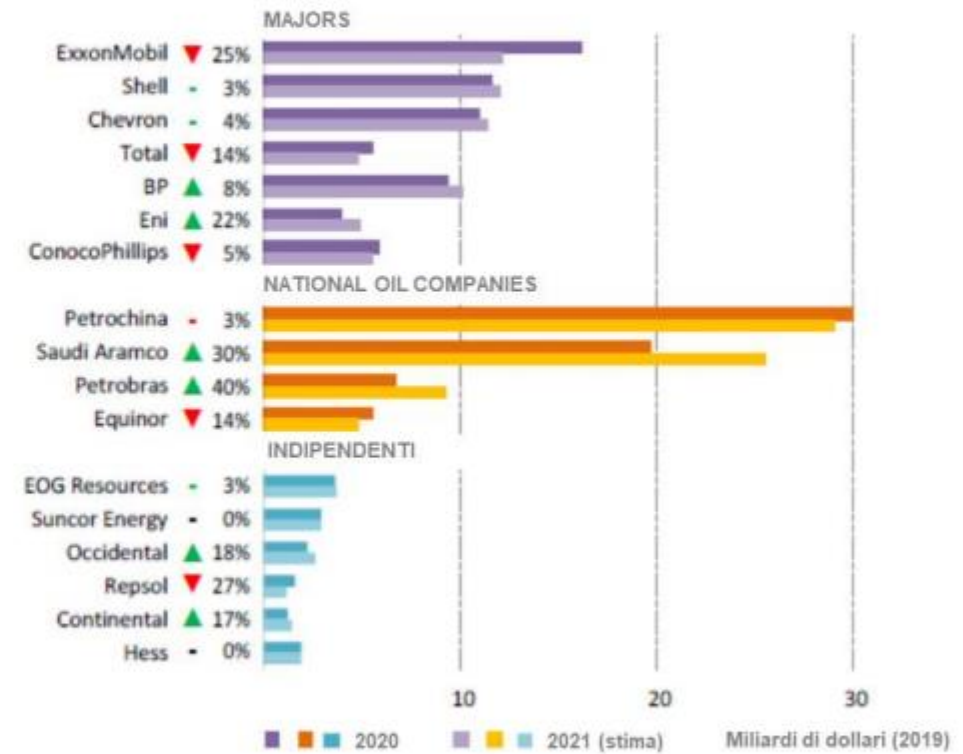
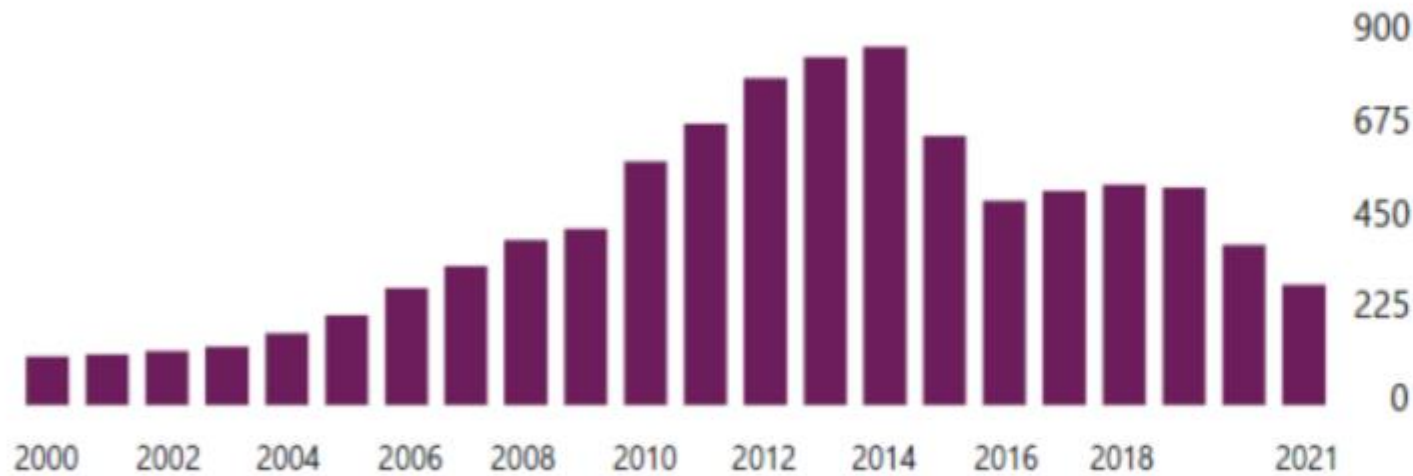
1. Deposito di Calata Canzio per bunker nel porto di Genova (3-400 kT/Y - 10 navi cargo + 300 bettoline)
2. Produzione di oli lubrificanti a Vado Ligure (450 kT/anno - 35 navi/anno)
3. Terminale SARPOM^(*) di Quiliano connesso con la raffineria di Trecate (NO) (6 MT/Y - 70 navi/Y)
4. Stabilimento Infineum ^(**) di Vado Ligure che produce additivi per oli lubrificanti e carburanti
 - 500 circa fra dipendenti e contractori; 35 M€/Y di spese sul territorio; 115 navi + 300 bettoline



(*) Società di cui la Esso Italiana è socio di maggioranza

(**) Società partecipata al 50% da Esso Italiana e al 50% da Shell Italia

Gli investimenti oil&gas (miliardi di dollari)

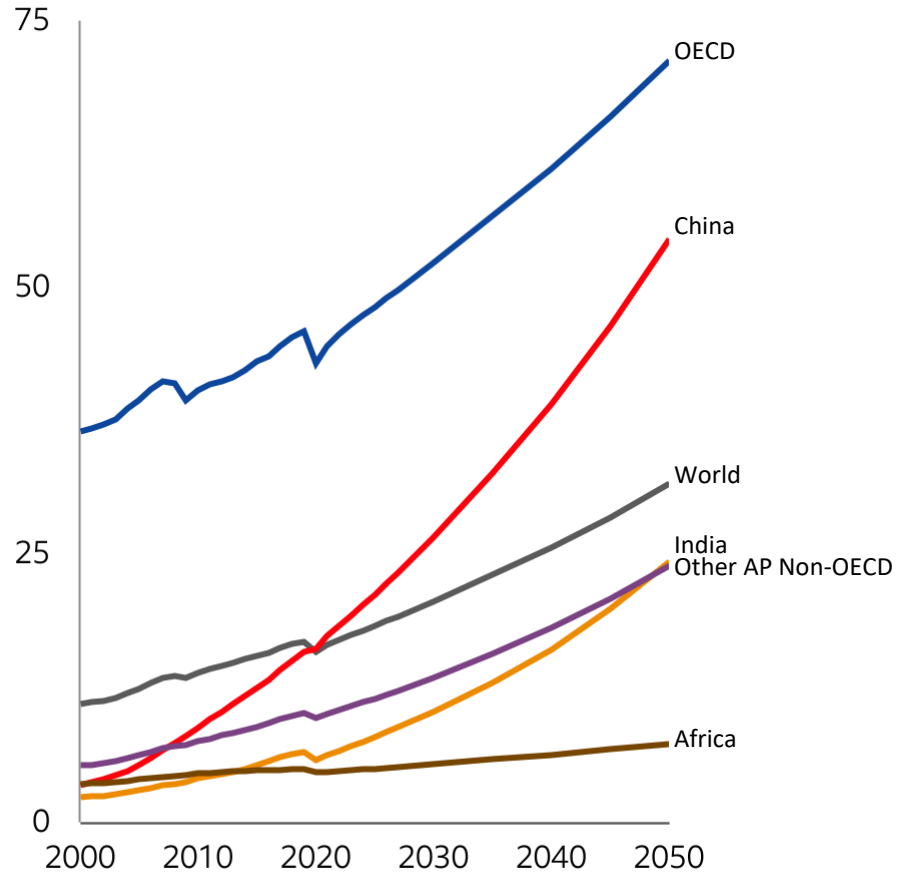


Fonte: Rie, Oil&Gas Journal, Rystad Energy 2022

Economies continue to develop and grow

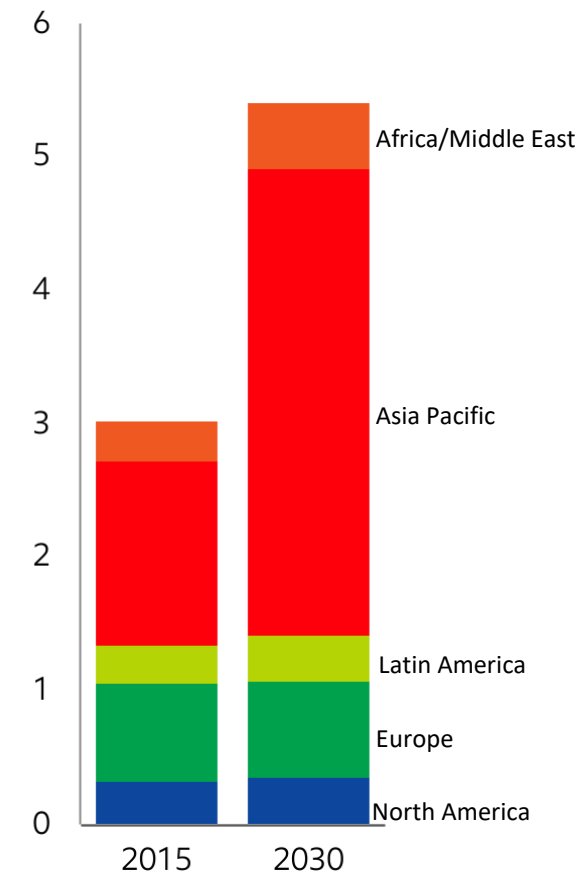
Purchasing power expands

GDP per capita – thousands of purchasing parity dollars



Middle class almost doubles

Global middle class – billions of people

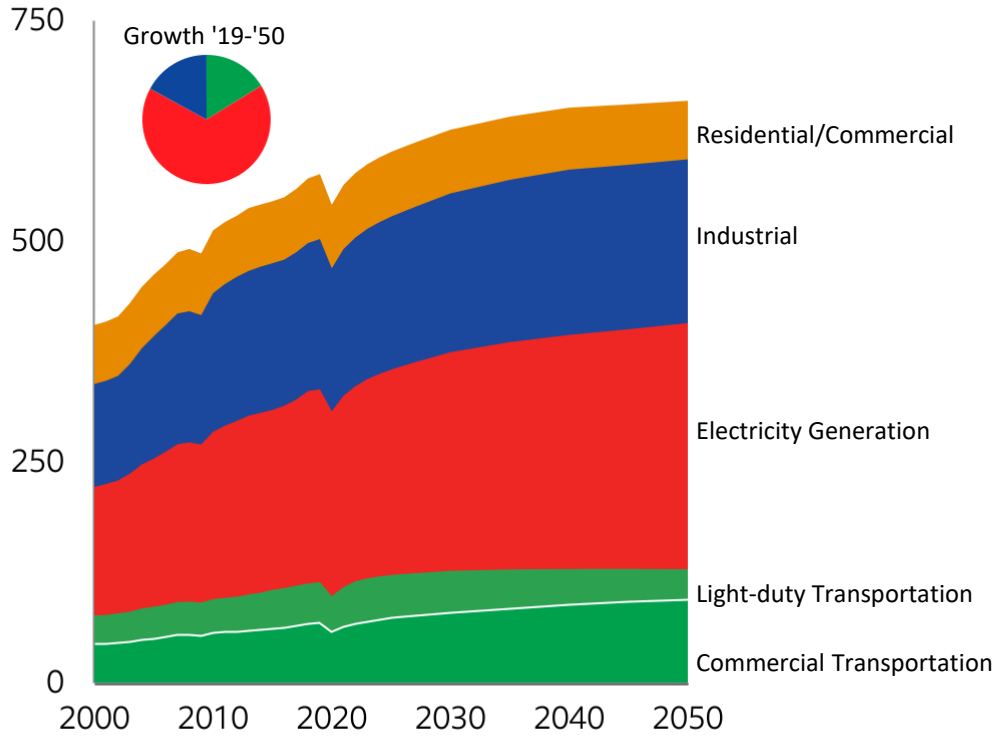


Source: The Brookings Institution - Global Economy & Development 2017

Energy trends vary by sector and geography

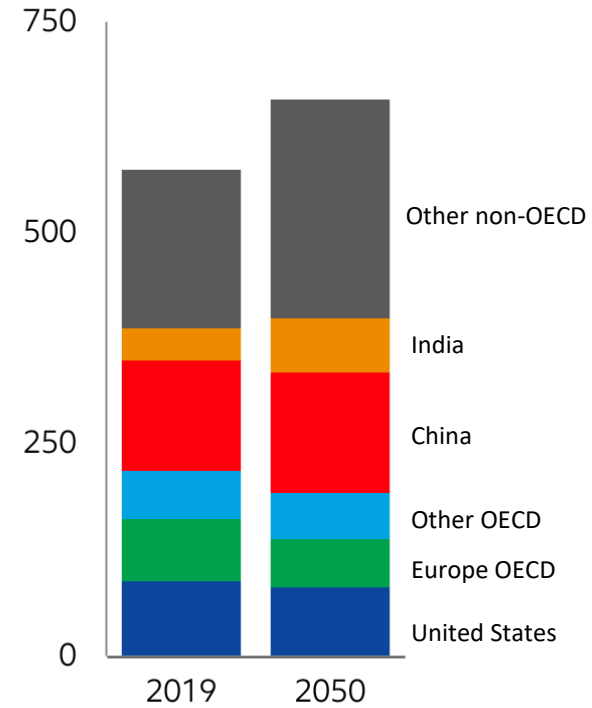
Global energy demand by sector

Primary energy – quadrillion BTUs



Energy demand led by non-OECD

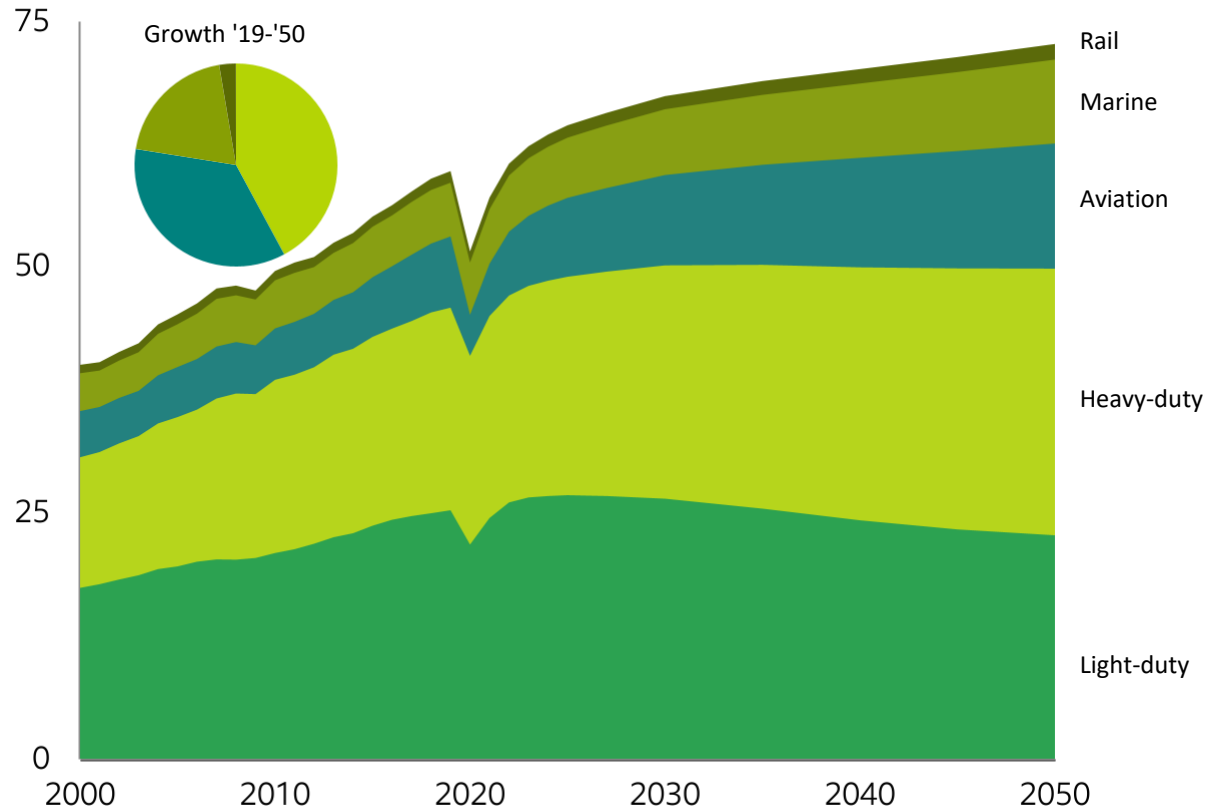
Primary energy – quadrillion BTUs



Transportation demand growth driven by commerce

Transportation energy demand

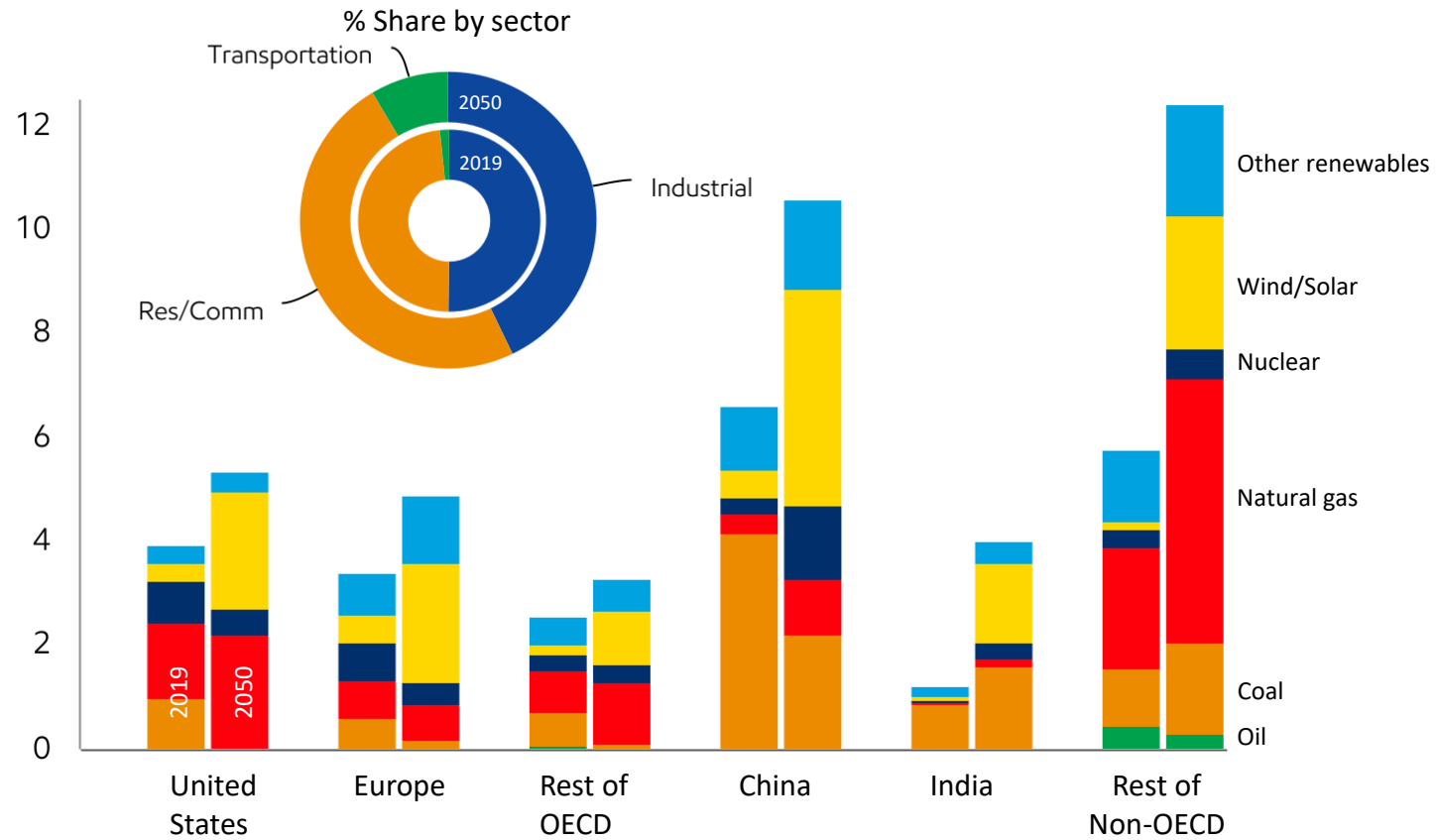
Global sector demand – million oil-equivalent barrels per day (MBDOE)



Electricity grows across all regions, but supply varies

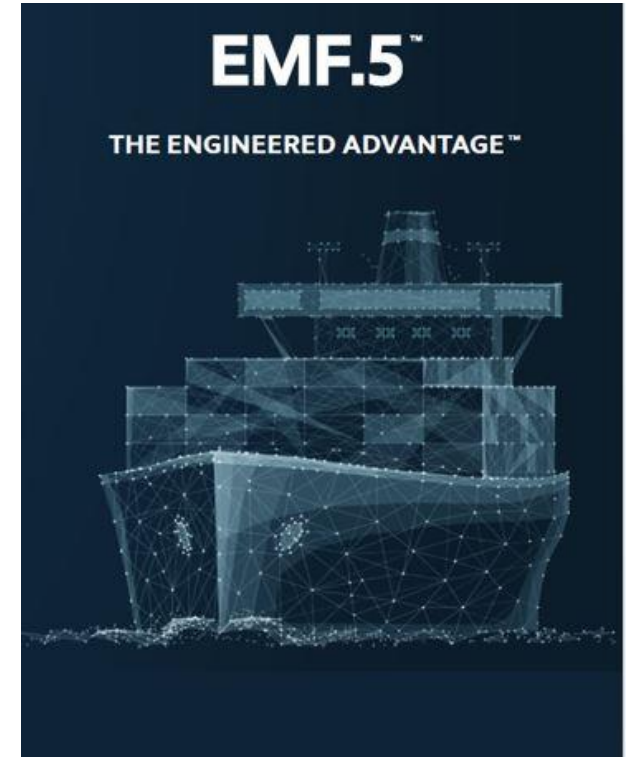
Electricity generation highlights regional diversity

Net delivered electricity – thousand TWh



Ricerca e innovazione tecnologica

- La Esso è attivamente impegnata nell'innovazione tecnologica, nella ricerca e nello sviluppo di combustibili e lubrificanti marina di alta qualità e a sempre minore impatto ambientale:
 - gamma di nuovi lubrificanti marina Mobilgard™, già pronti per un futuro «multi-fuel»
 - nuovo combustibile a basso zolfo Esso EMF.5™, presente a Genova come hub strategico per il bunker nel Med
 - nuovo combustibile a bassissimo zolfo con componente bio (FAME) di seconda generazione proveniente da rifiuti (certificato ISCC) positivamente testato
 - ✓ 40% di riduzione delle emissioni di CO2 rispetto ai combustibili marina convenzionali



Ricerca e innovazione tecnologica



Near-term projects focused on Canada, Europe and California



STRATHCONA (CANADA) RENEWABLE DIESEL

20 kbd (1160 ML/yr), start up 2024

Driven by Canadian fuel regulations, local feedstocks, advantaged hydrogen supply, CCS infrastructure, proprietary technology



ACQUIRED STAKE IN BIOJET AS (NORWAY) TO PRODUCE BIOFUELS AND BIOFUELS COMPONENTS

Up to 8 kbd (460 ML/yr), anticipated from 2025

Produced from forestry and wood-based construction waste, distribution to NW Europe from Slagen terminal



GREEN HYDROGEN AND AMMONIA PRODUCTION EVALUATION AT EXXONMOBIL SLAGEN TERMINAL IN NORWAY

Studying potential for up to 20 Ktons of green hydrogen potential production and 100 kTons of green ammonia distribution at Slagen Terminal in Norway



E-FUELS FROM GREEN HYDROGEN AND CAPTURED CARBON DIOXIDE

Chile location with one of the best global wind profiles, enabling nearly continuous operation (>65%)

EM catalyst technology and fuel blending know-how

Fuel tested in Porsche's high-performance motorsport engines in the Porsche Mobil 1 Supercup series

ExxonMobil