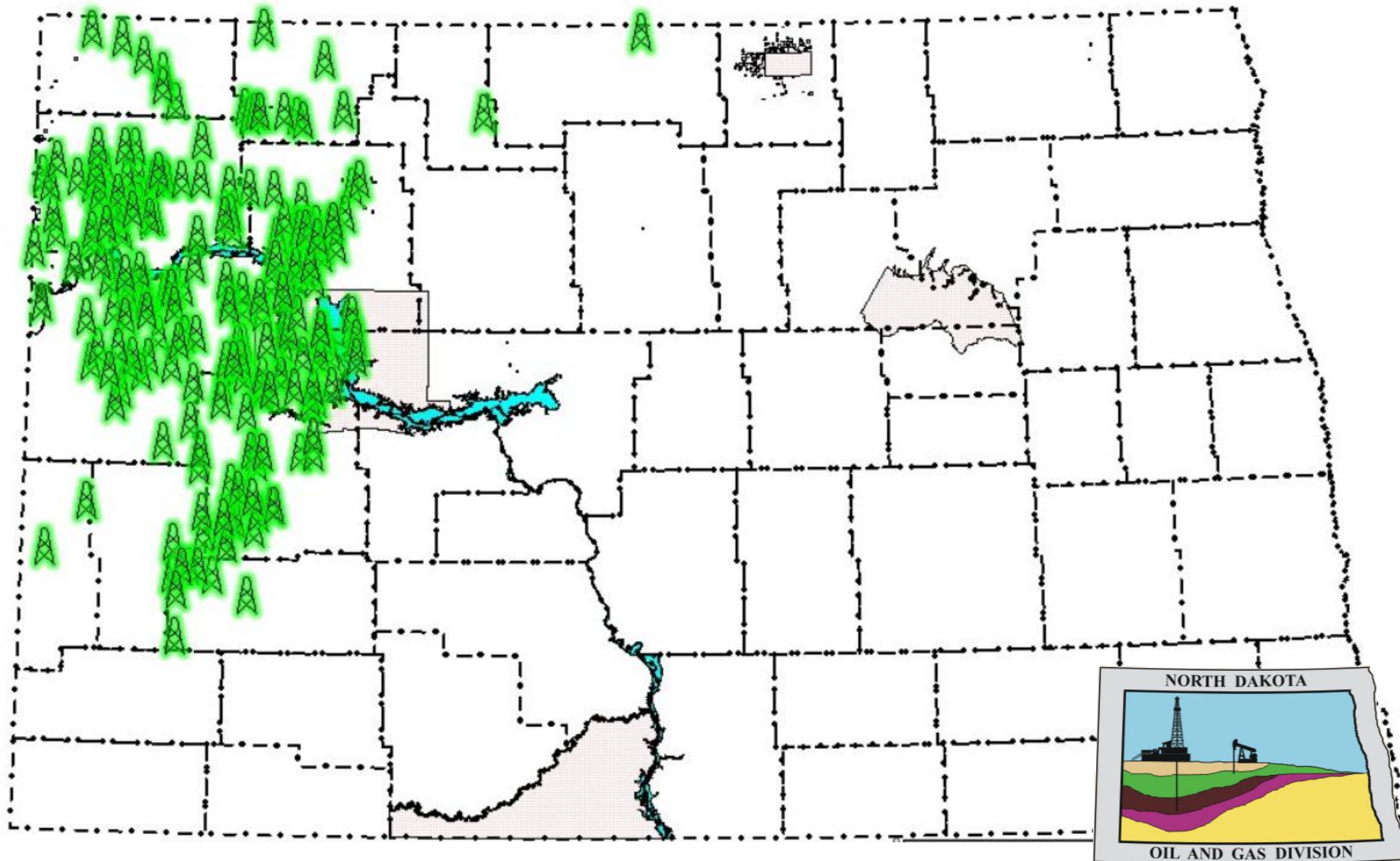


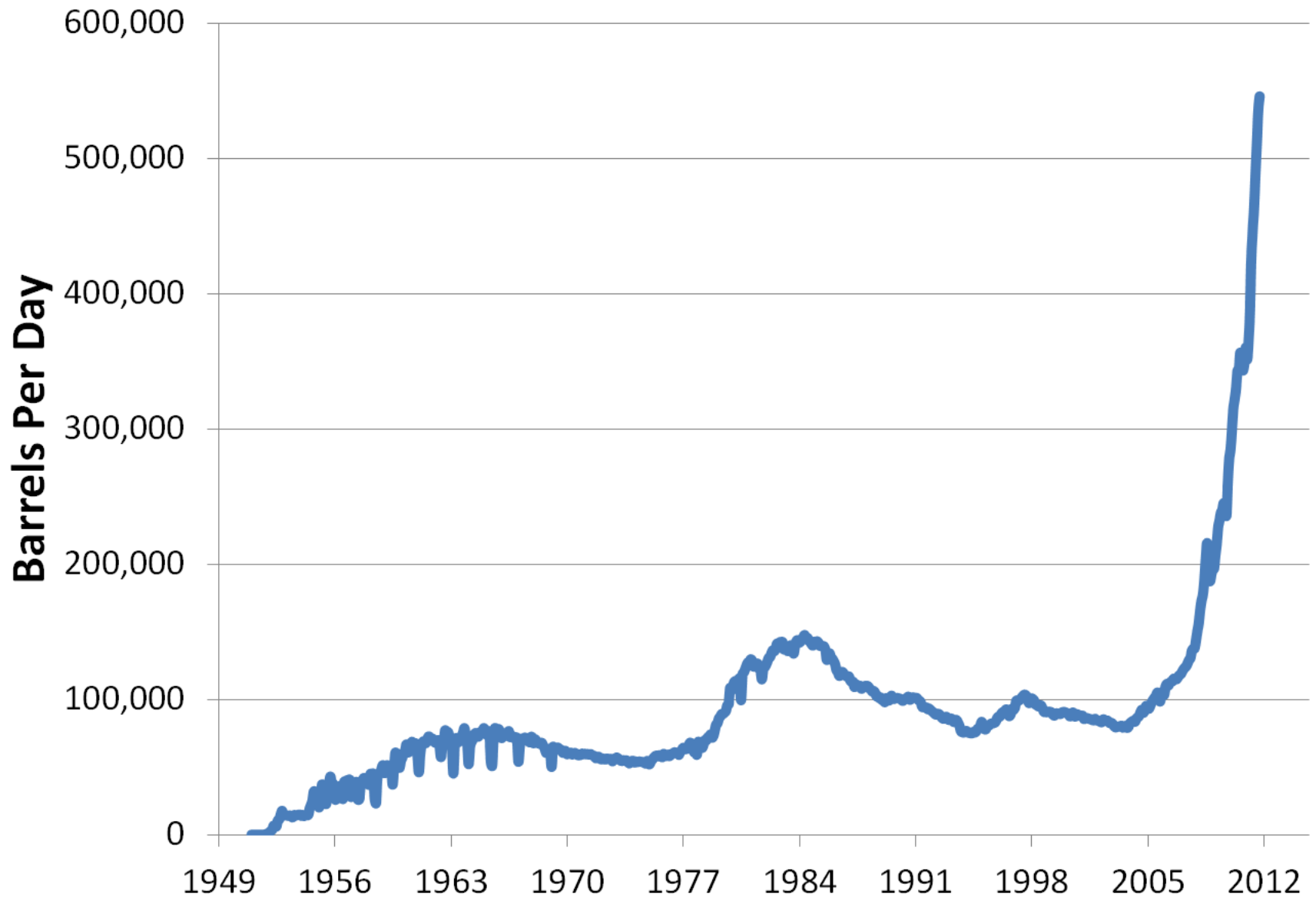


North Dakota Pipeline Authority
Central Power Annual Meeting
March 28, 2012 – Minot, ND

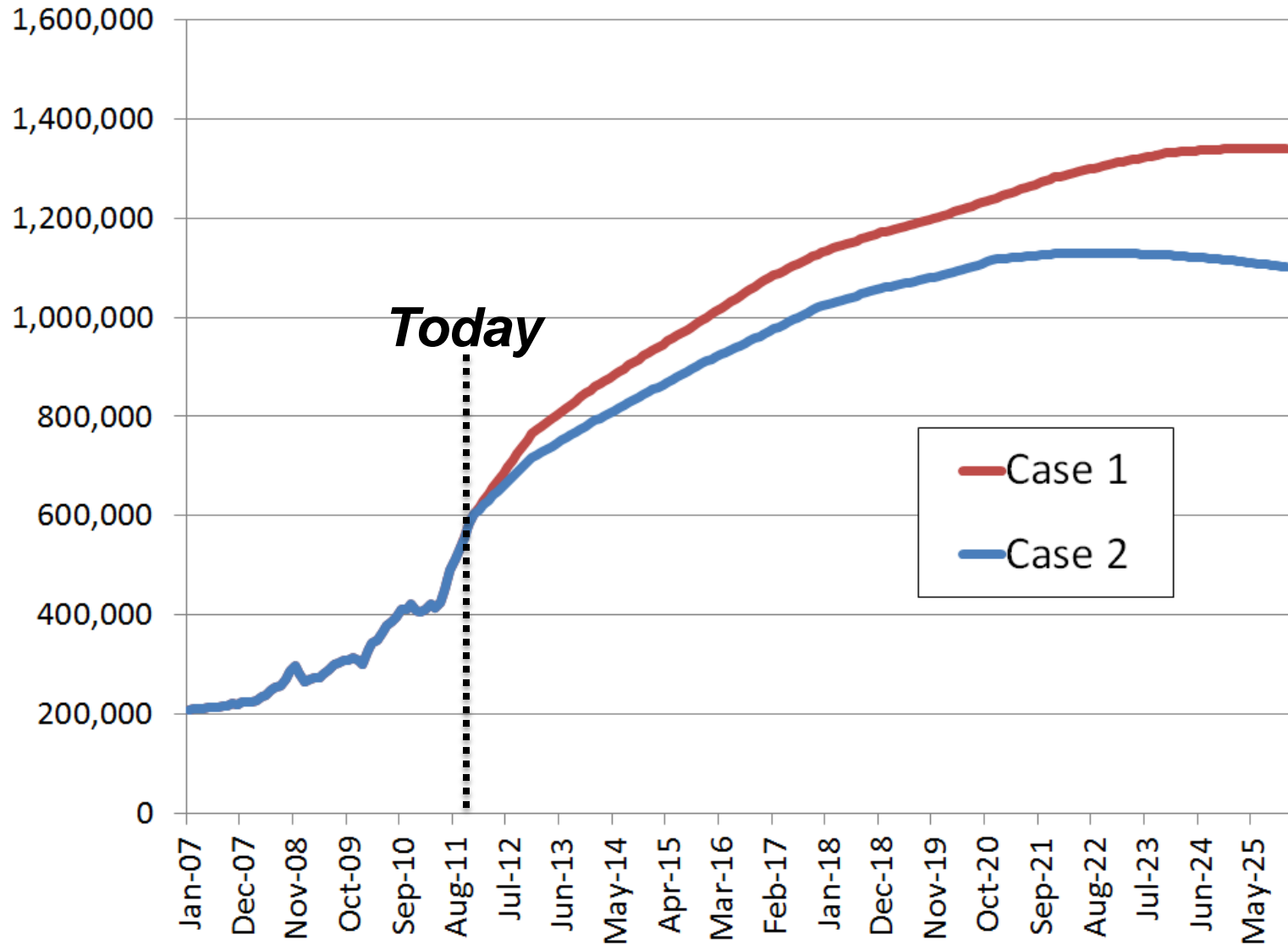
205 Active Rigs – March 27, 2012



North Dakota Crude Oil



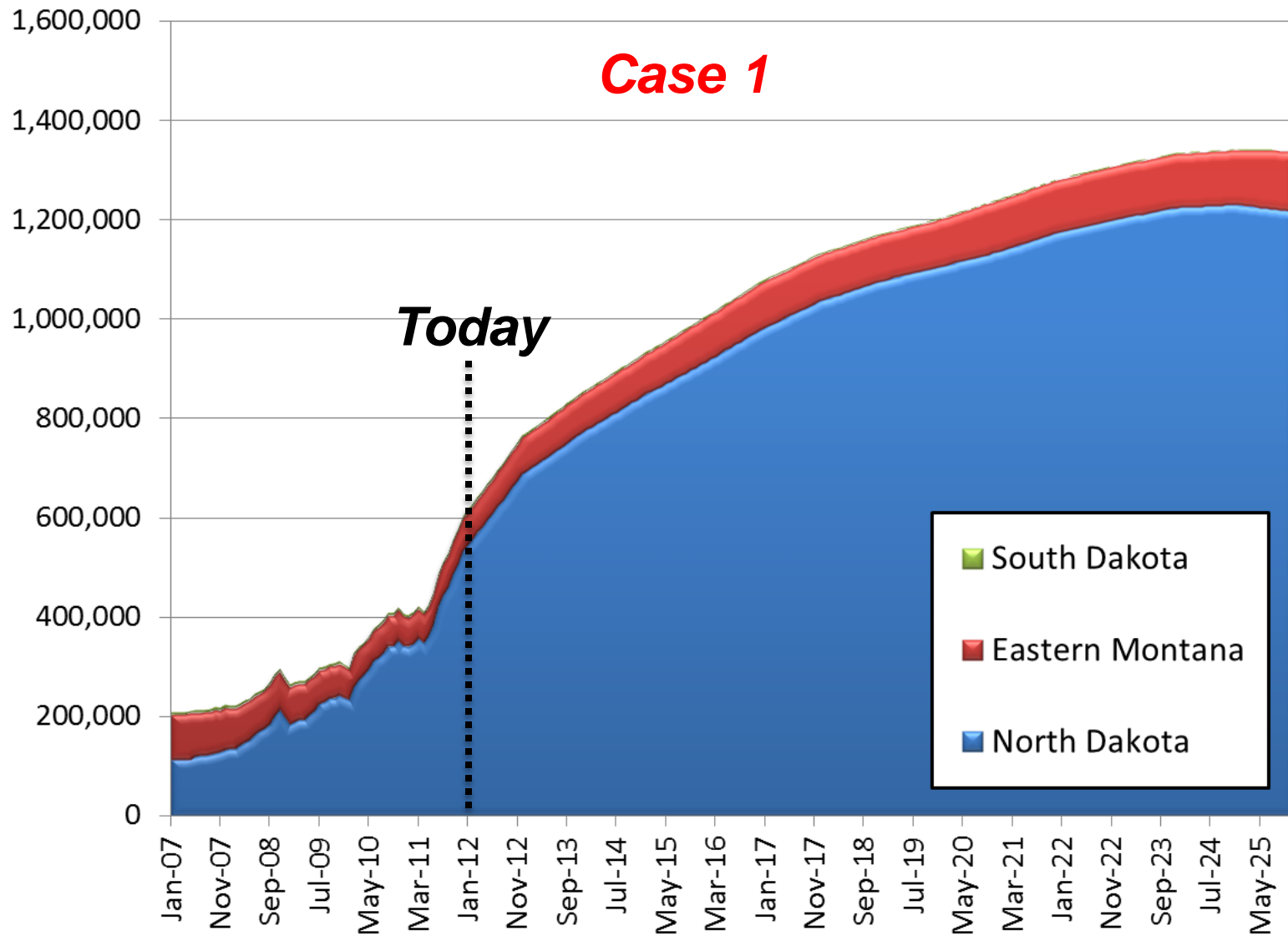
Forecasting Williston Basin Oil Production, BOPD



Production forecast is for visual demonstration purposes only and should not be considered accurate for any near or long term planning.



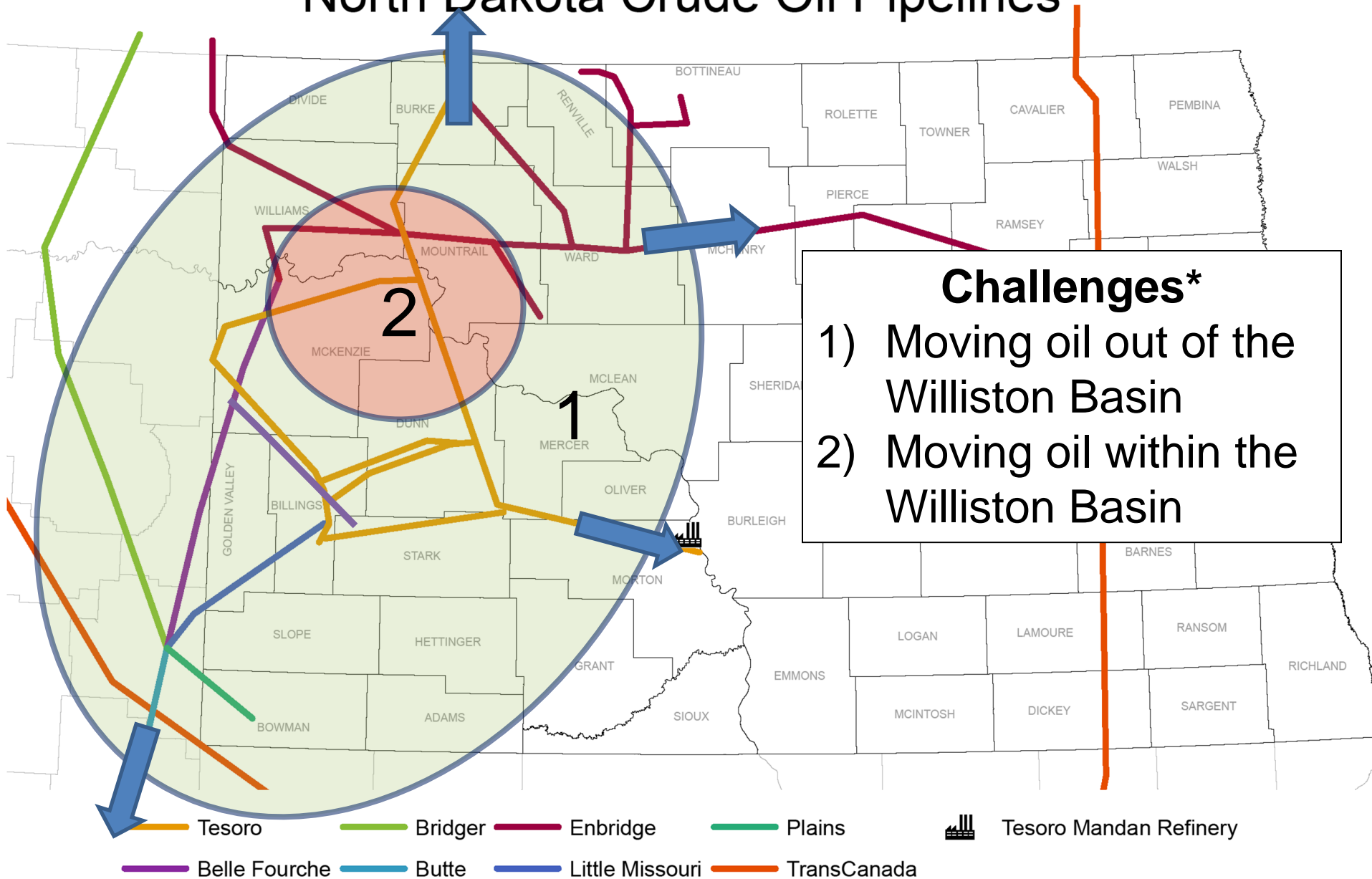
Forecasting Williston Basin Oil Production, BOPD



Production forecast is for visual demonstration purposes only and should not be considered accurate for any near or long term planning.

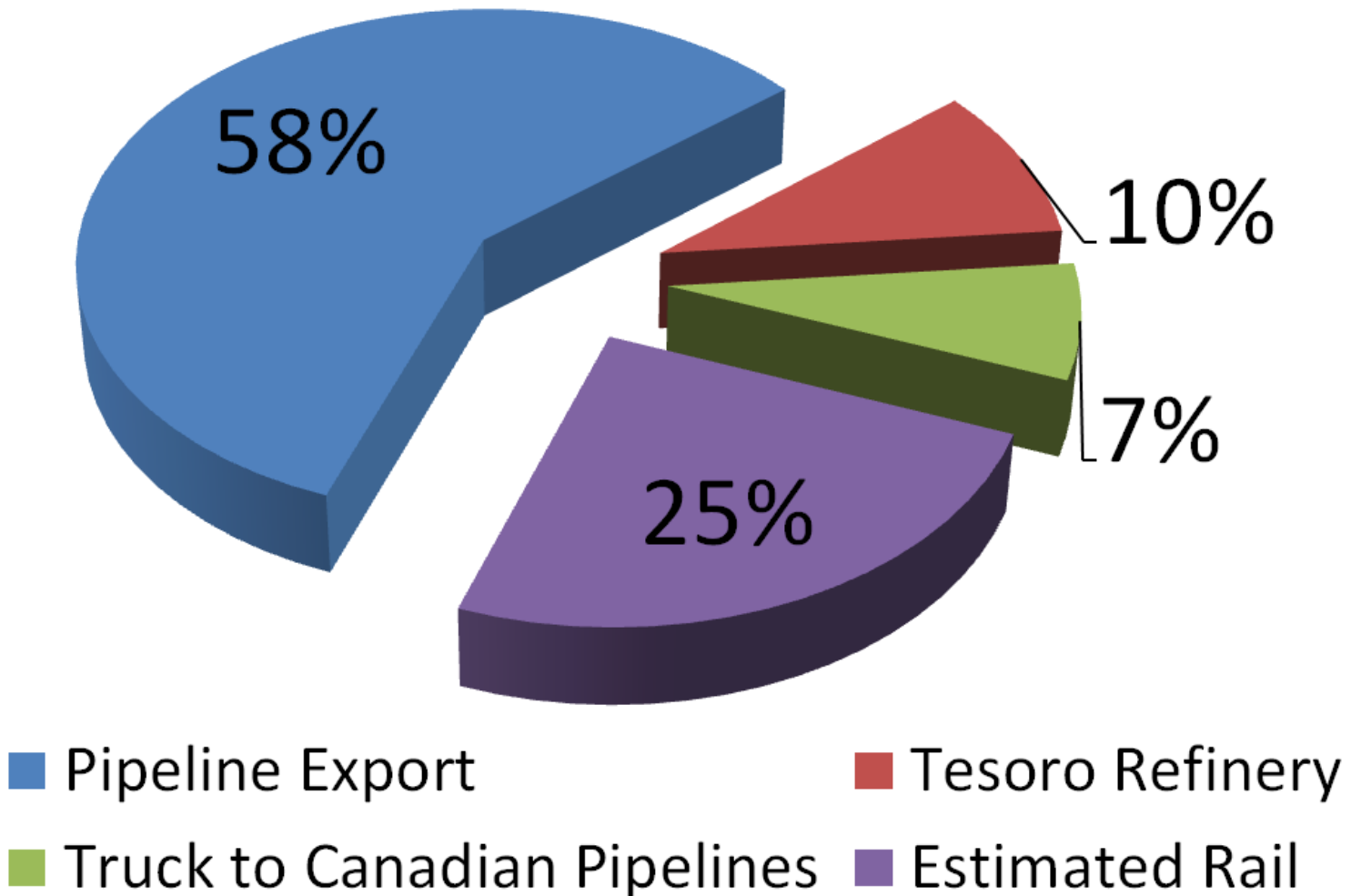


North Dakota Crude Oil Pipelines



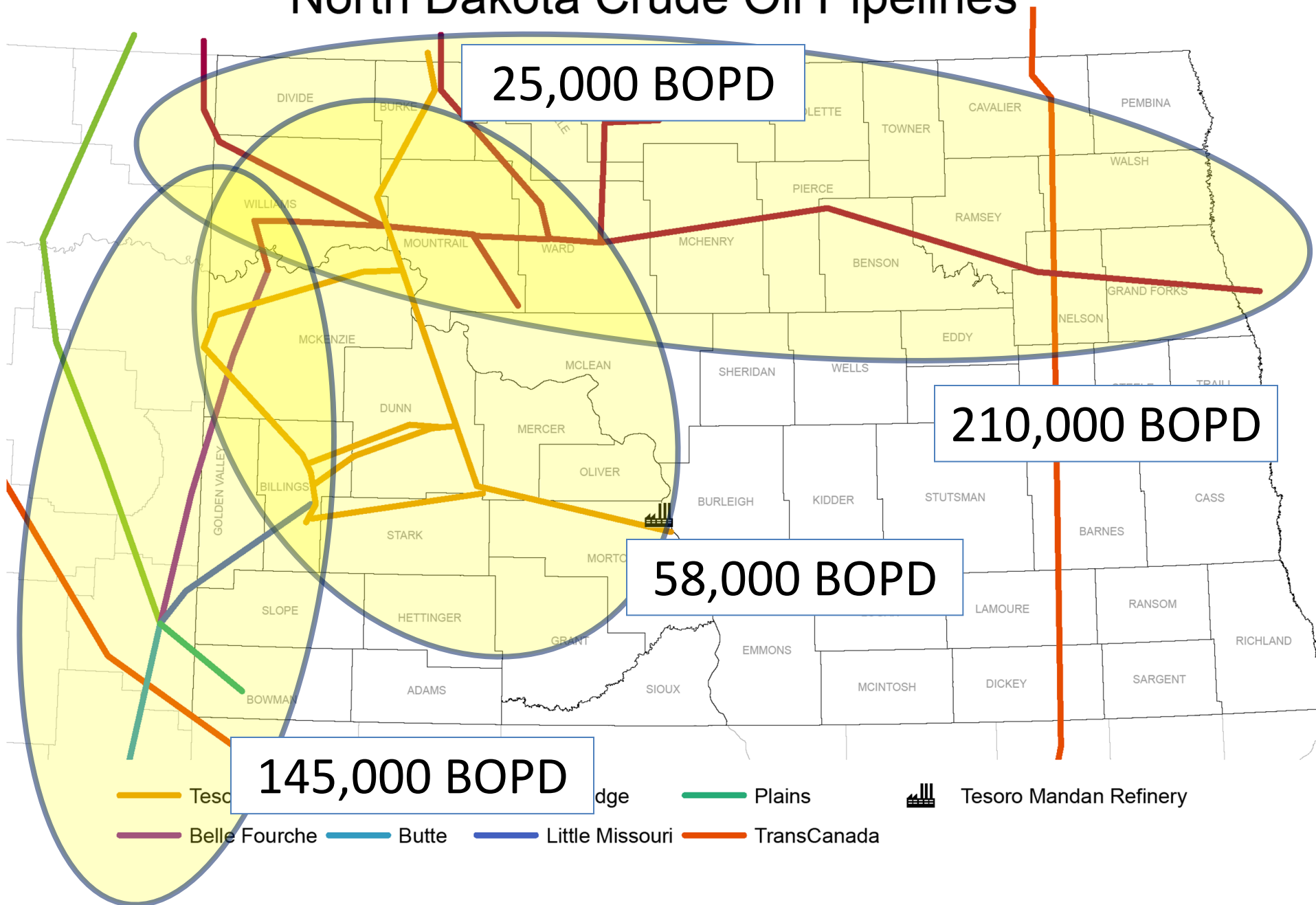
*Modified from Bridger and Belle Fourche Pipelines

Williston Basin Oil Transportation

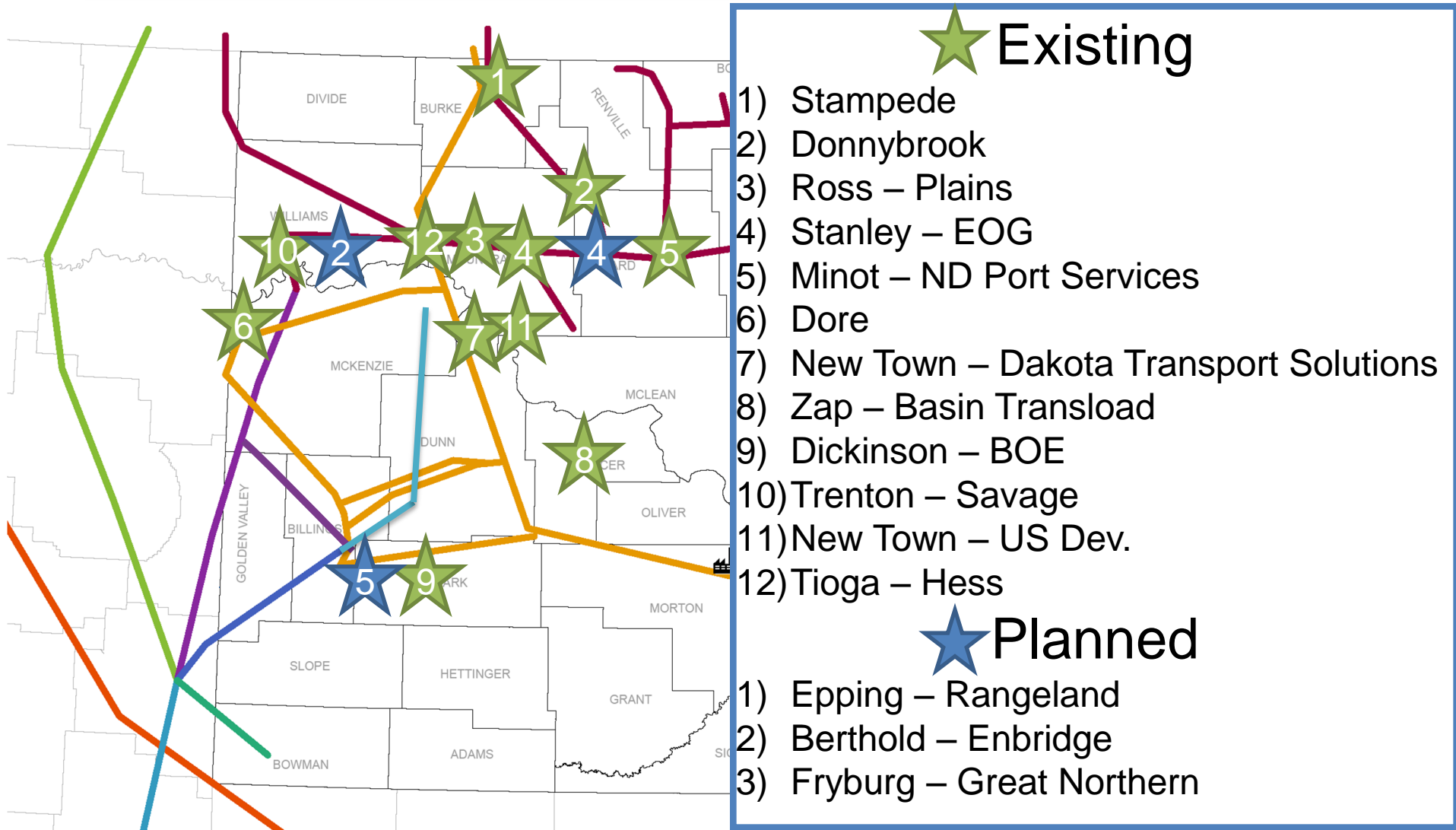


January 2012 Estimates

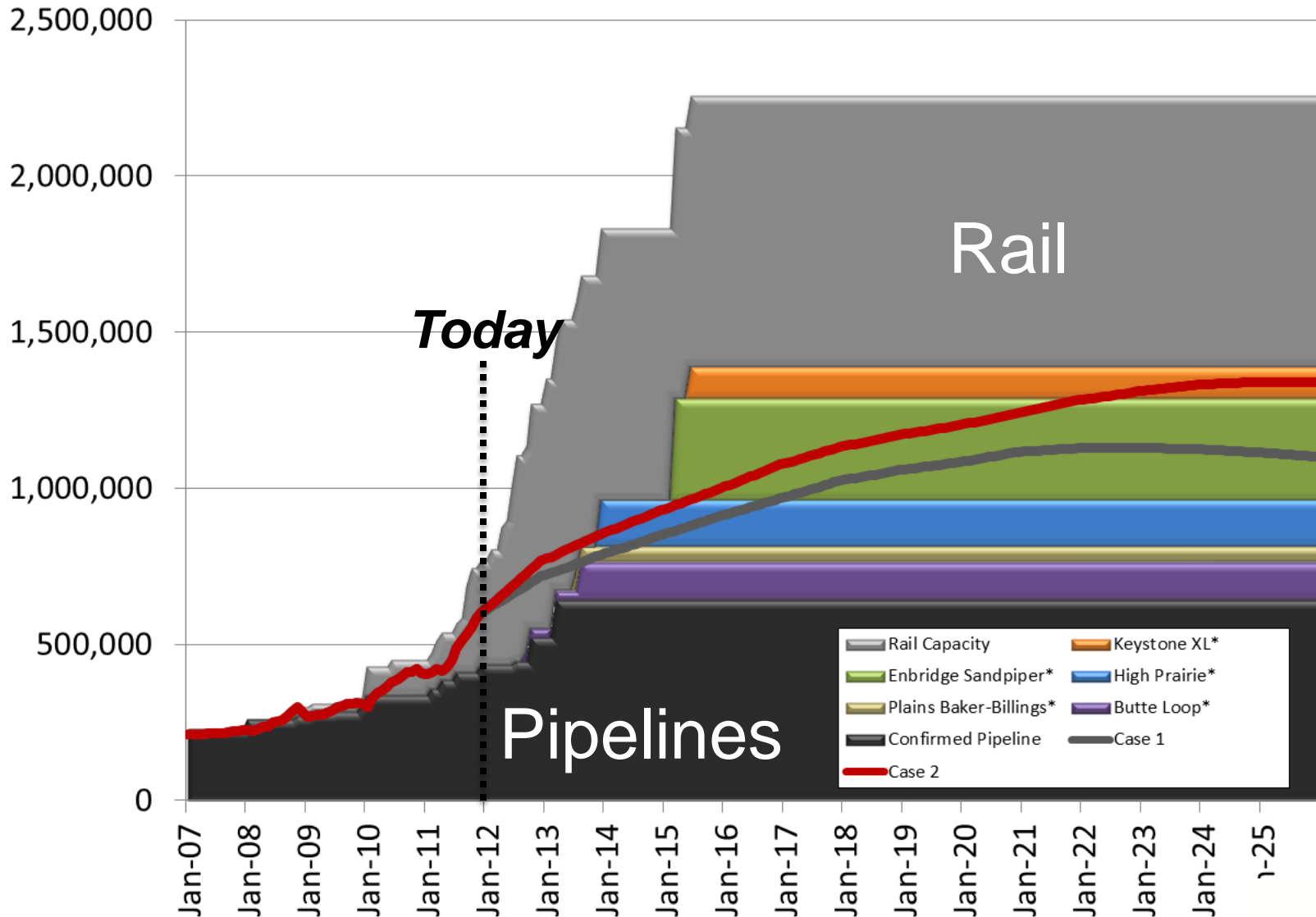
North Dakota Crude Oil Pipelines



Existing & Planned Rail Locations



Williston Basin Oil Production & Export Capacity, BOPD

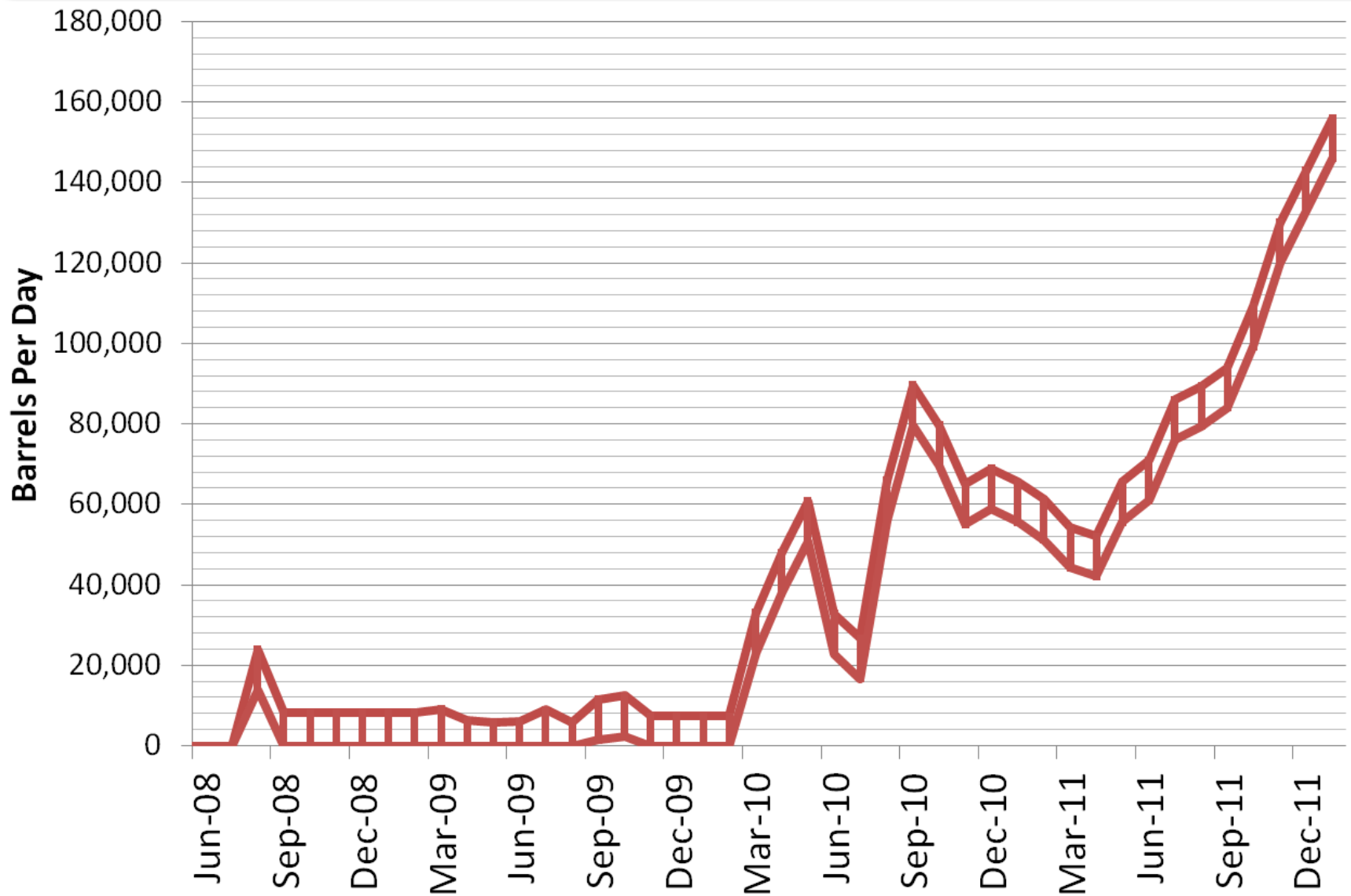


Production forecast is for visual demonstration purposes only and should not be considered accurate for any near or long term planning.

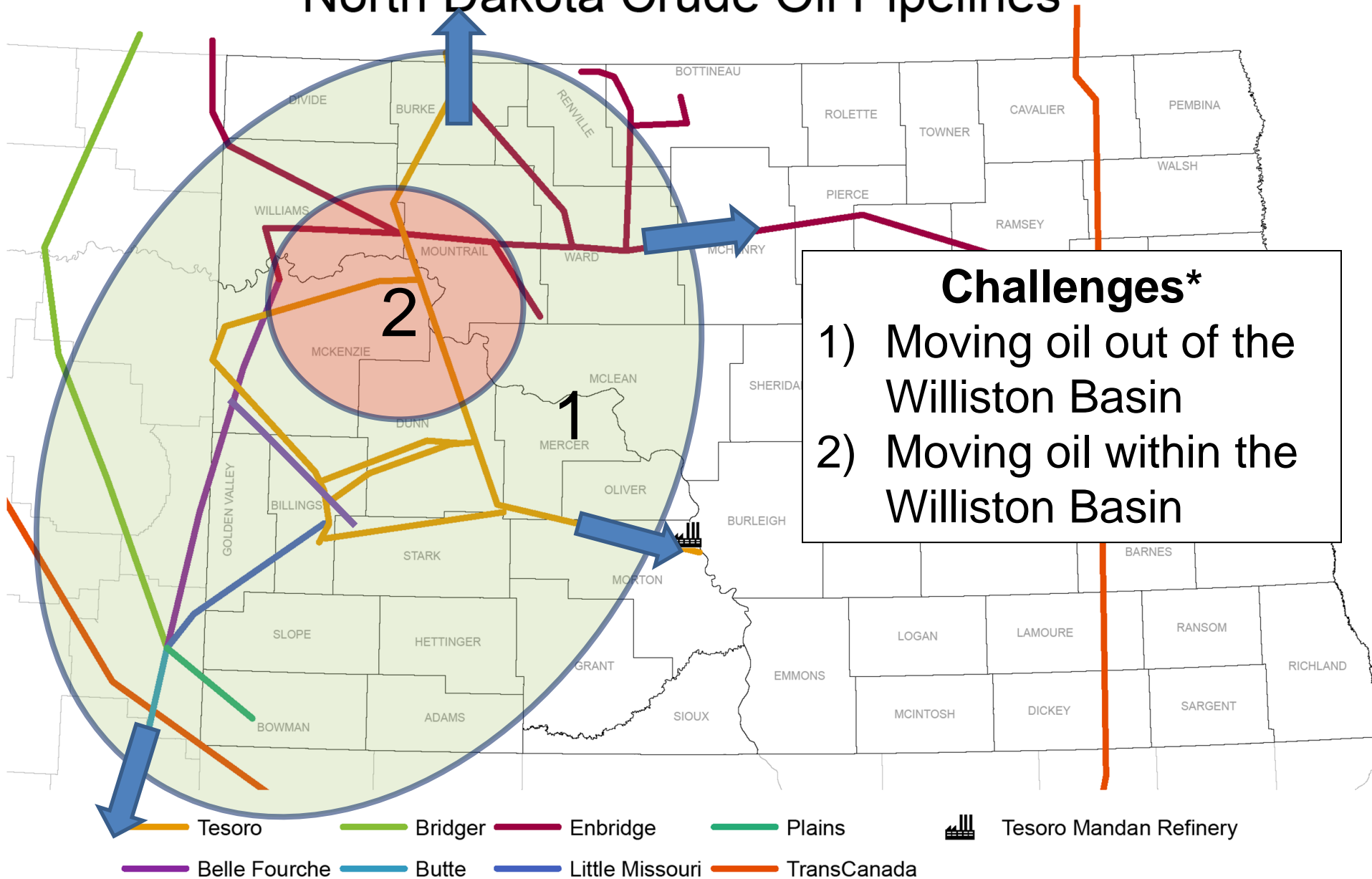
*Projects still in the proposed or internal review process



High-Low Rail Estimate, BOPD



North Dakota Crude Oil Pipelines



*Modified from Bridger and Belle Fourche Pipelines

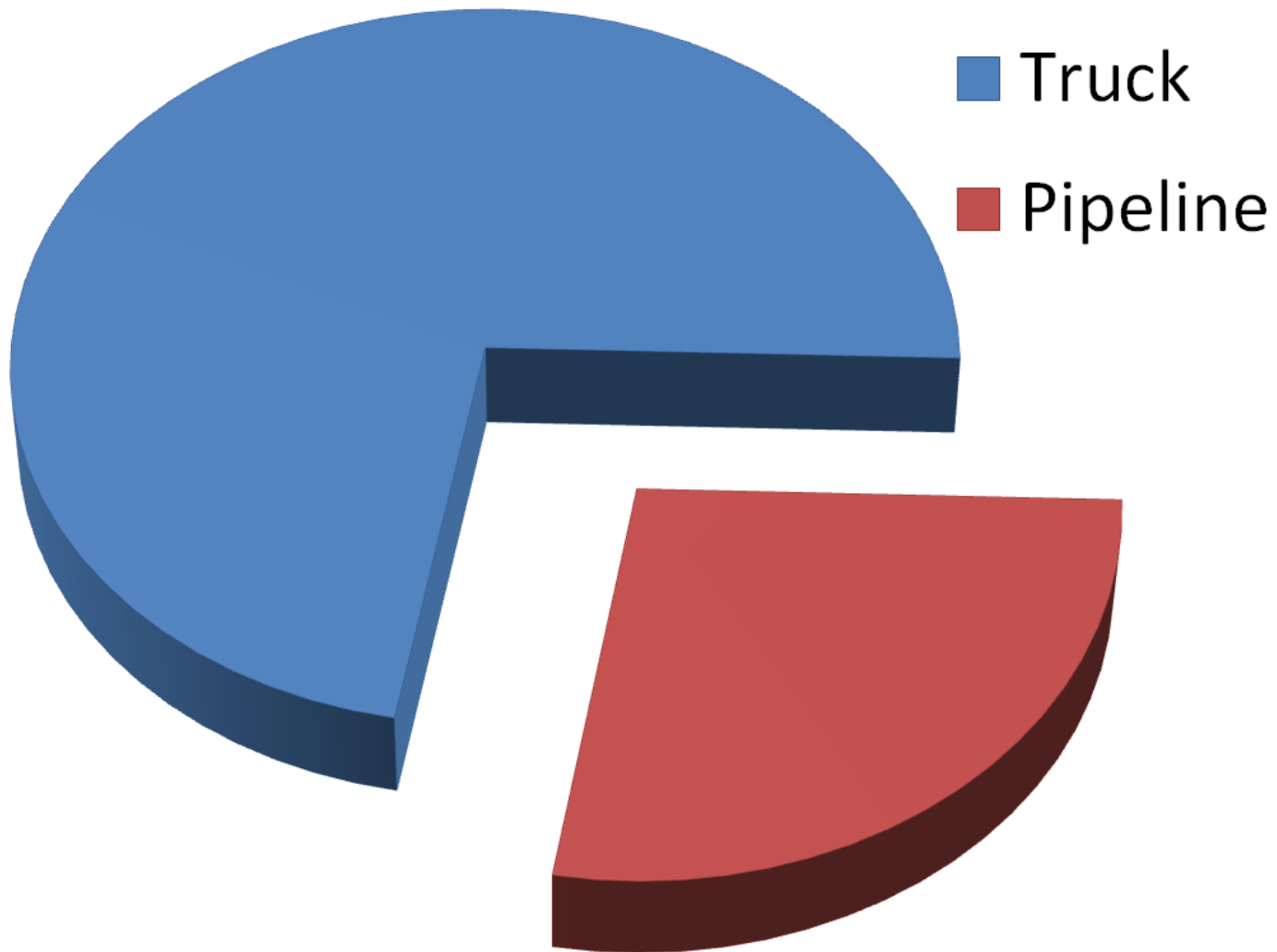
North Dakota Crude Gathering



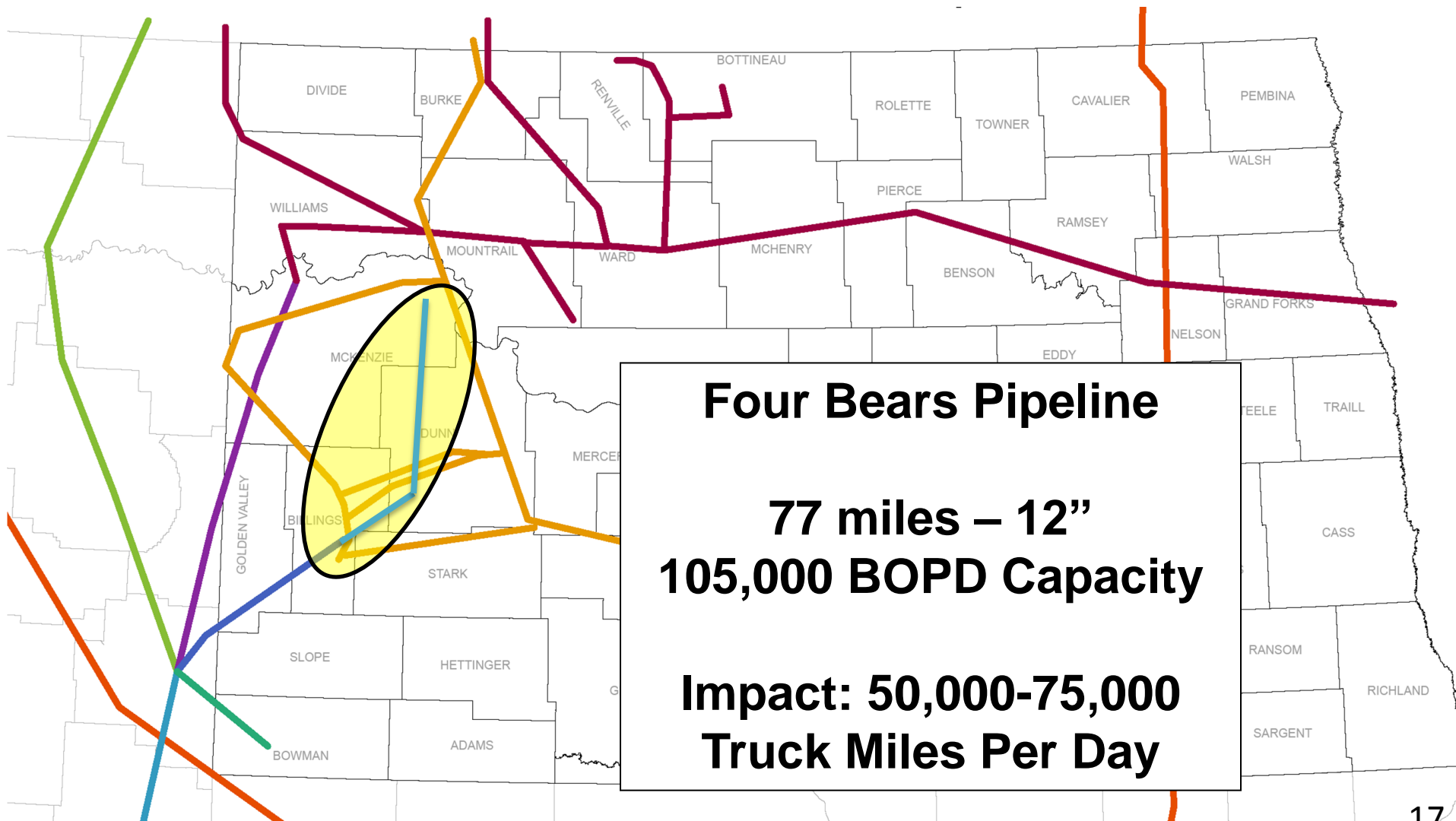




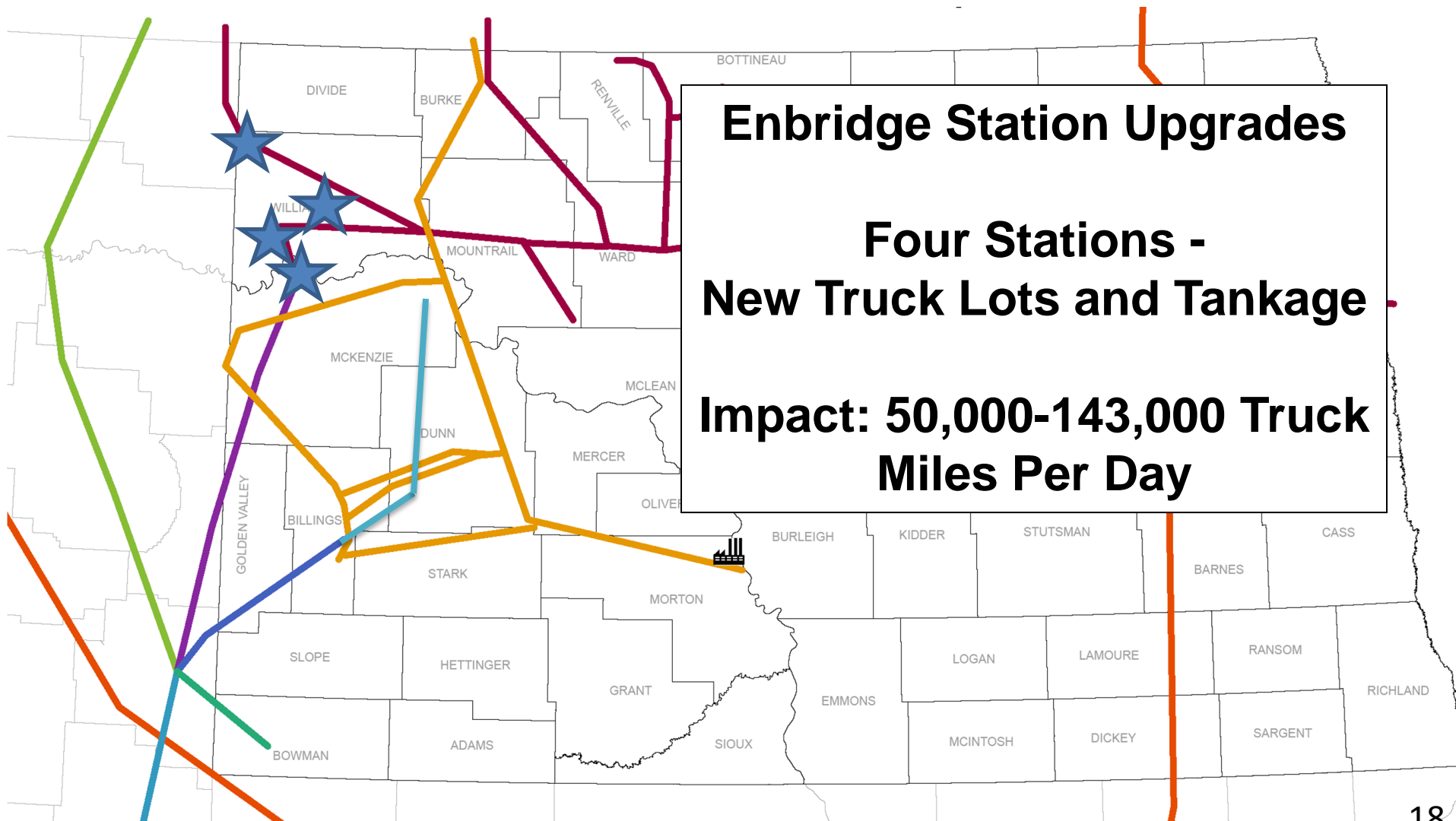
North Dakota Crude Gathering



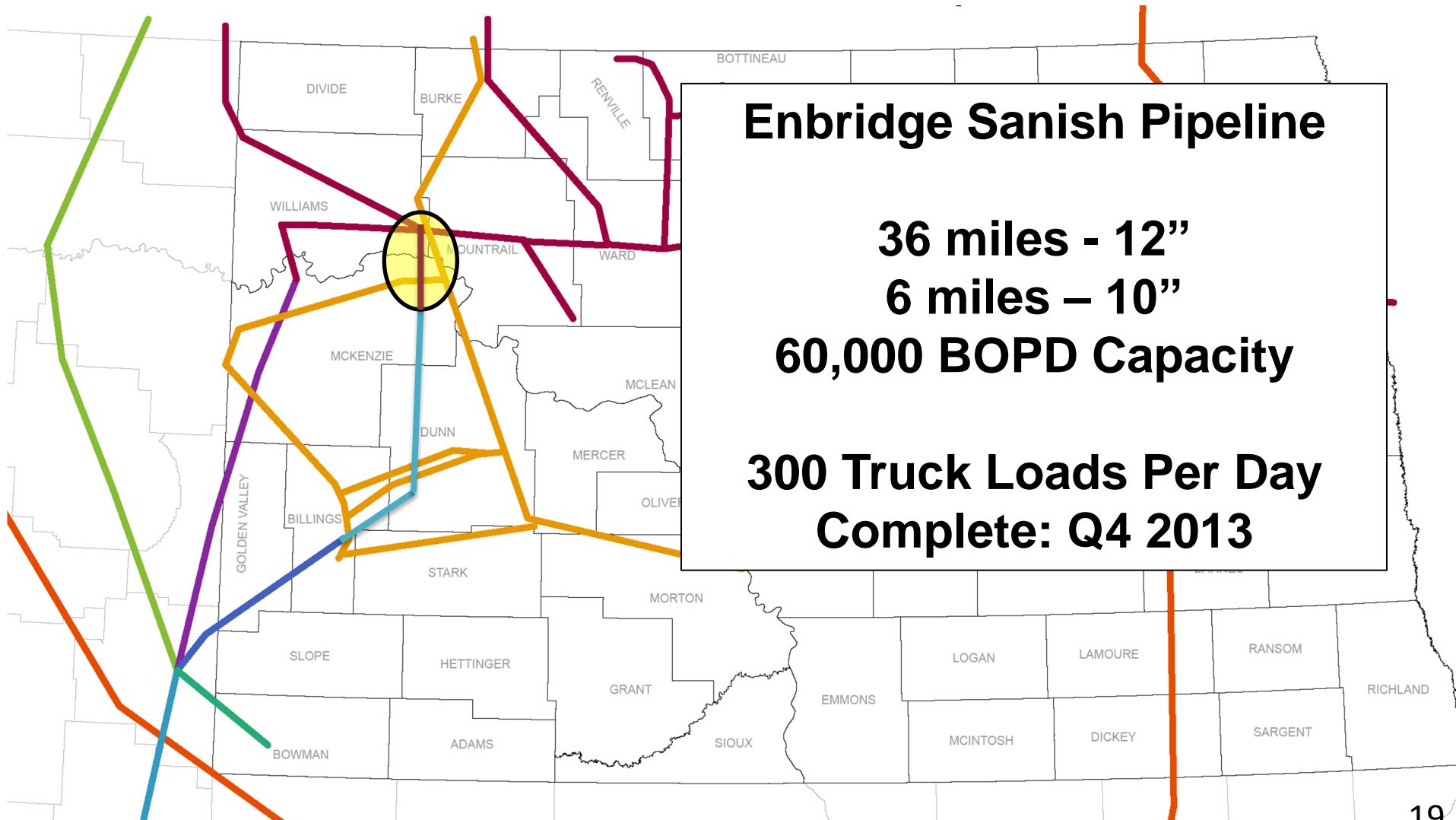
Reducing Truck Traffic



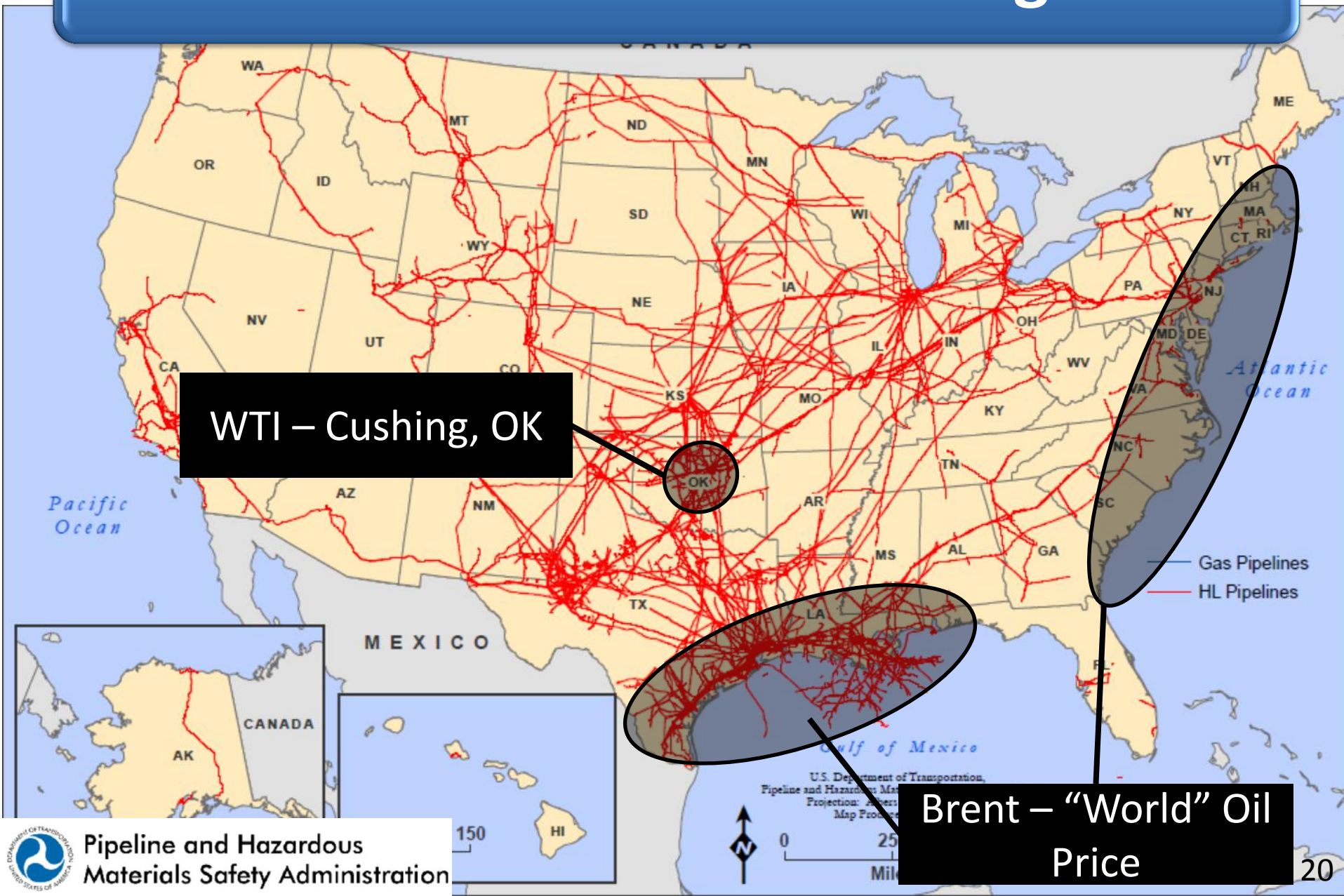
Reducing Truck Traffic



Reducing Truck Traffic



Brent-WTI Crude Pricing



Vancouver Inc.
Japan - 4,300 miles
Taiwan - 5,600 miles
S.Korea - 6,600 miles
China - 5,100 miles

San Francisco - 800 miles
Los Angeles - 1,100 miles

Puget Sound	
BP	234
ConocoPhillips	100
Shell	110
Tecoco	120
USOC	39

San Francisco	
Cheniere	210
ConocoPhillips	120
Shell	160
Tecoco	190
Valero	130

Los Angeles	
BP	260
Cheniere	260
ConocoPhillips	190
ExxonMobil	190
Tecoco	37
Valero	120

Upgrades	
Sensuade (Fort McMurray)	147
Suncor (Fort McMurray)	128
Shell (Gordale)	130
CNRL (Horseshoe)	130
CDP/Northern Long Lake	73

Sales and	
Imperial	140
Suncor	130
Shell	100
Unionville	100
Husky	38
Husky Upgrader	40

Refineries	
Co-op Refinery	100
Upgrader	100
Moore Inc.	13

2010 Canadian Crude Oil Production		
	000 m/bbl	000 b/d
British Columbia	5	31
Alberta	326	2,052
Saskatchewan	67	421
Manitoba	5	32
Northwest Territories	2	15
Western Canada	405	2,552
Atlantic Canada	44	276
Total Canada	449	2,828

PADD IV

PADD V

PADD II

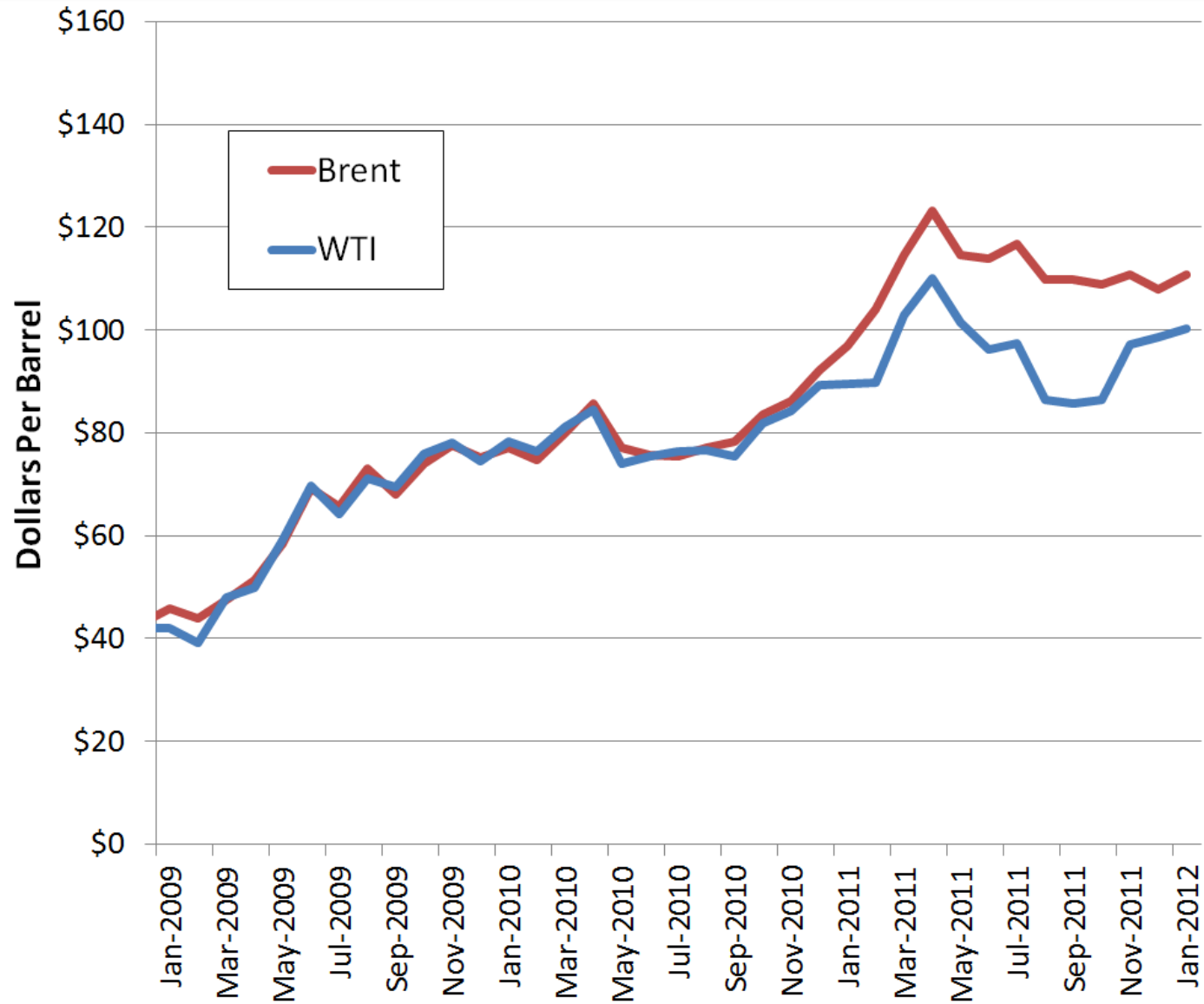
PADD III

PADD I

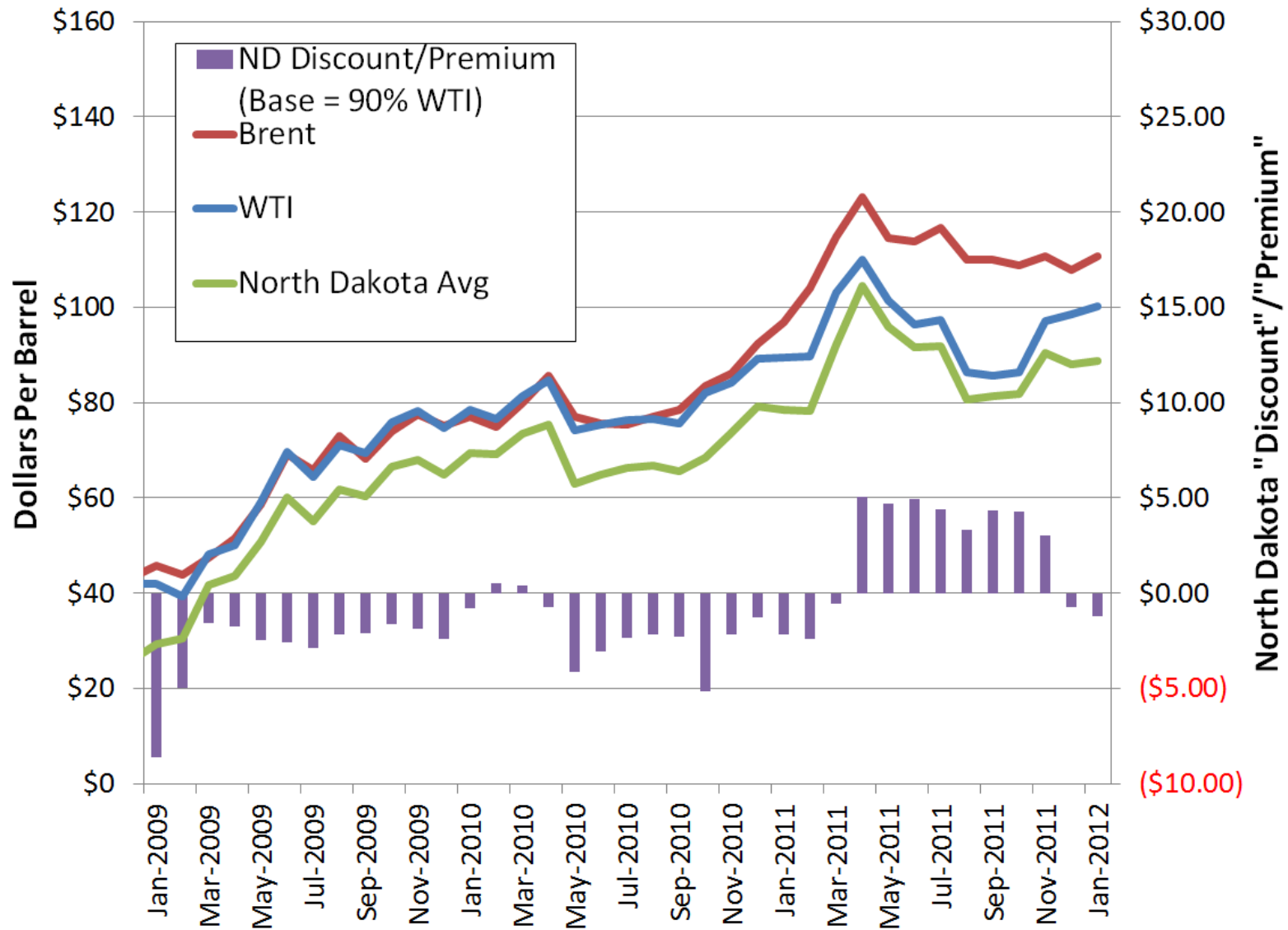
CAPP

CANADIAN ASSOCIATION
OF PETROLEUM PRODUCERS

Brent-WTI Crude Pricing



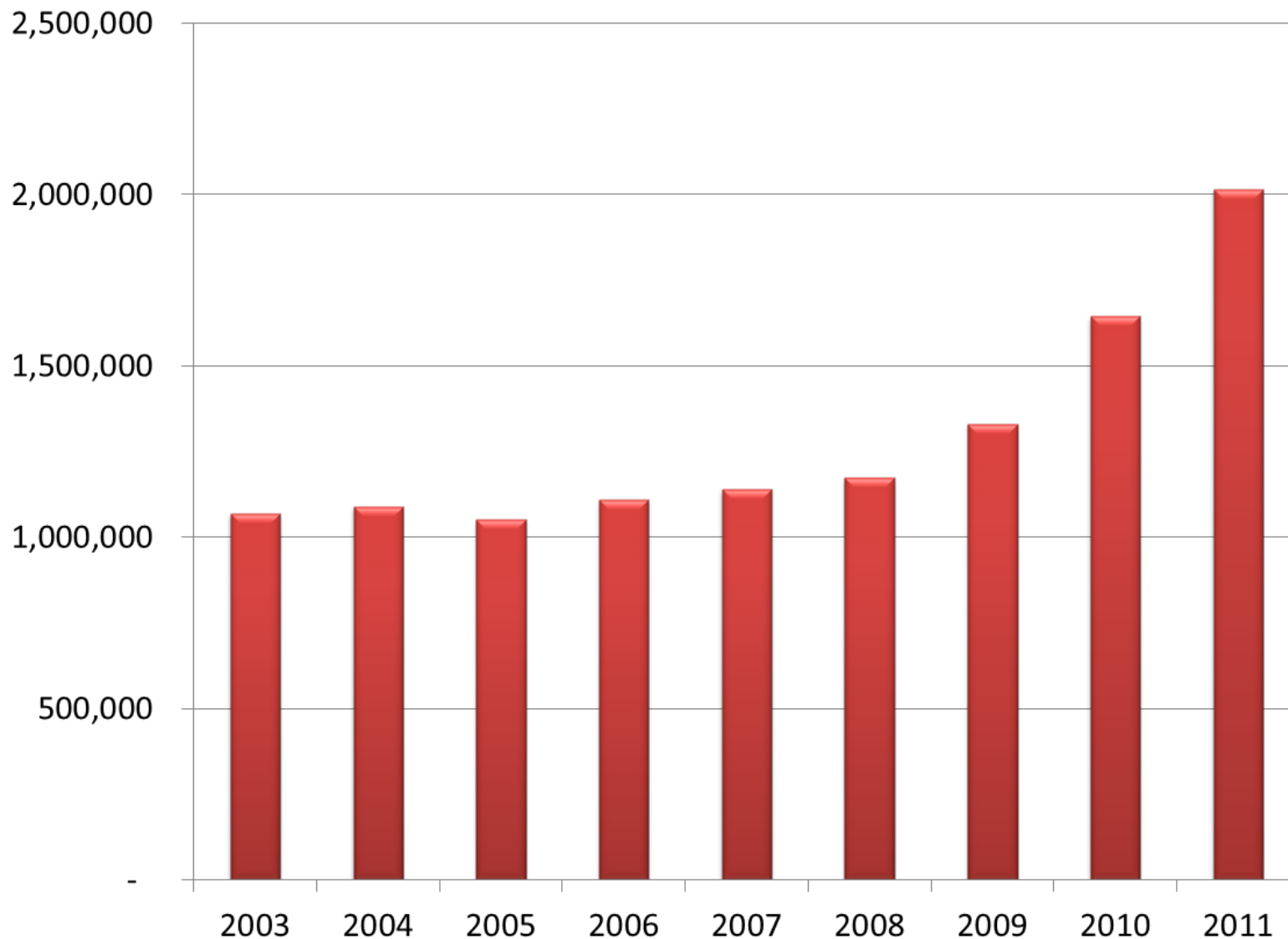
Brent-WTI-ND Crude Pricing



Natural Gas Projects



Homes Heated By ND Natural Gas



Based on Average US Home Natural Gas Consumption

Natural Gas Pipelines

Williston Basin
Interstate Pipeline

Alliance Pipeline

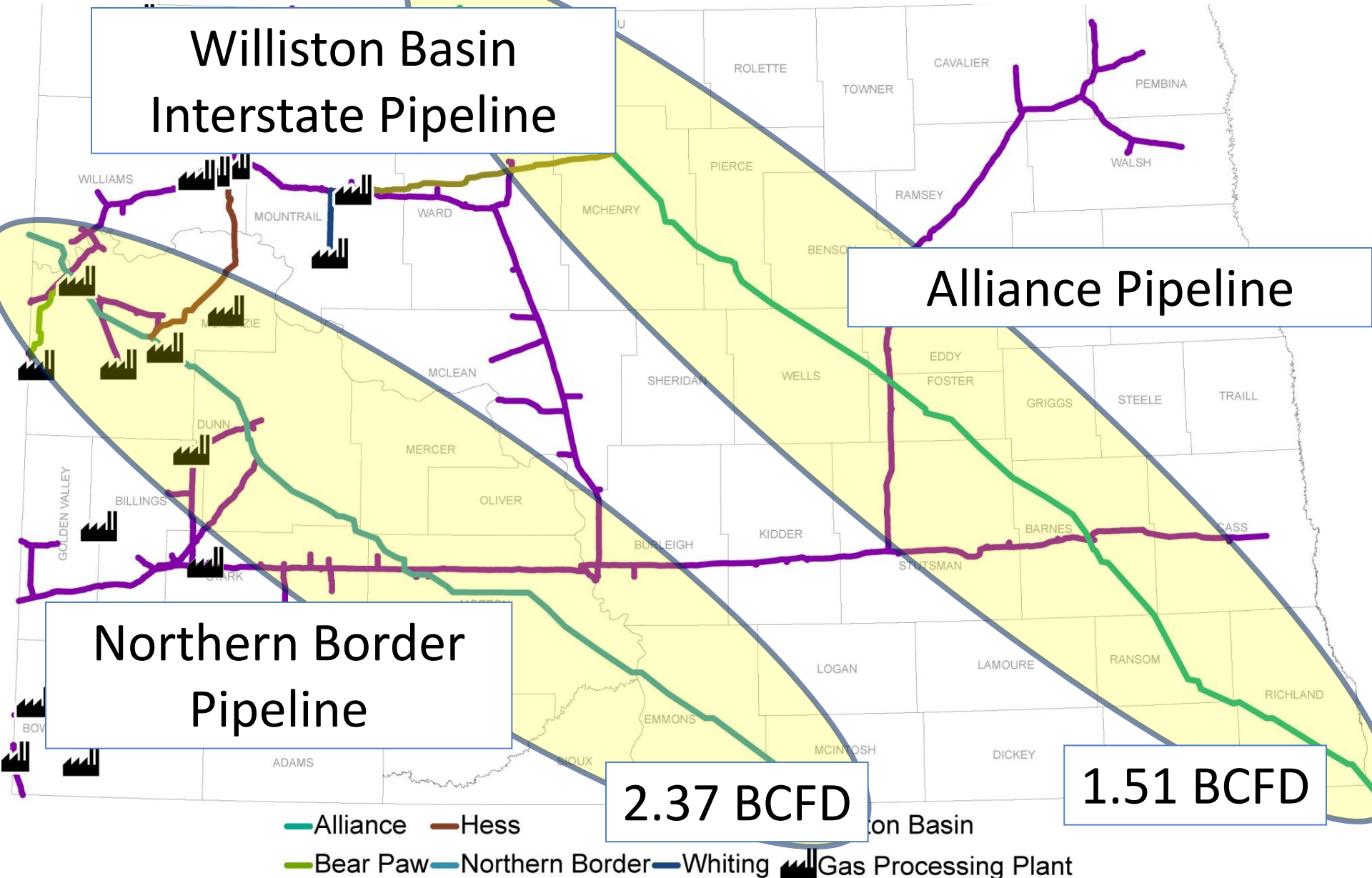
Northern Border
Pipeline

2.37 BCFD

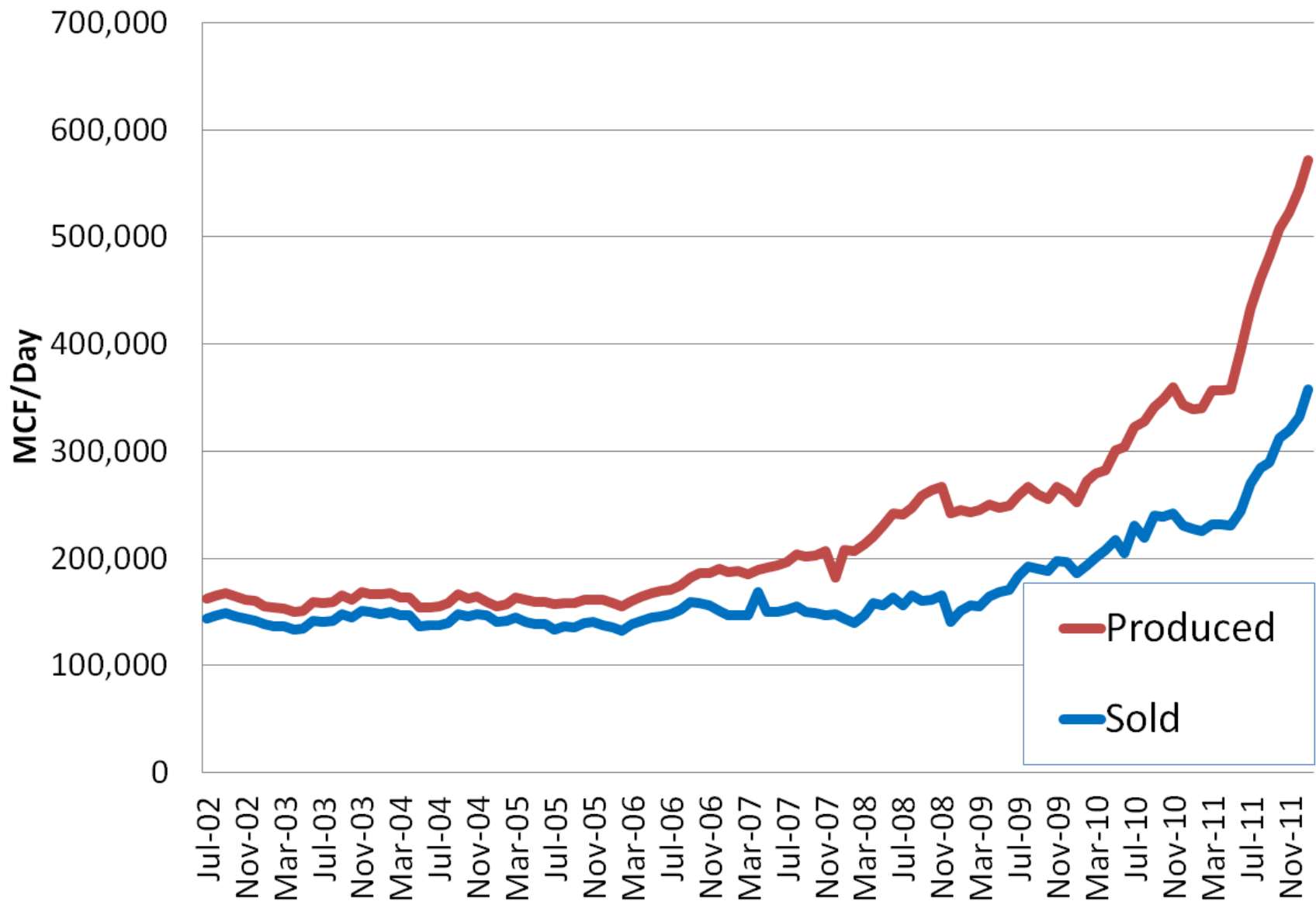
1.51 BCFD

— Alliance — Hess

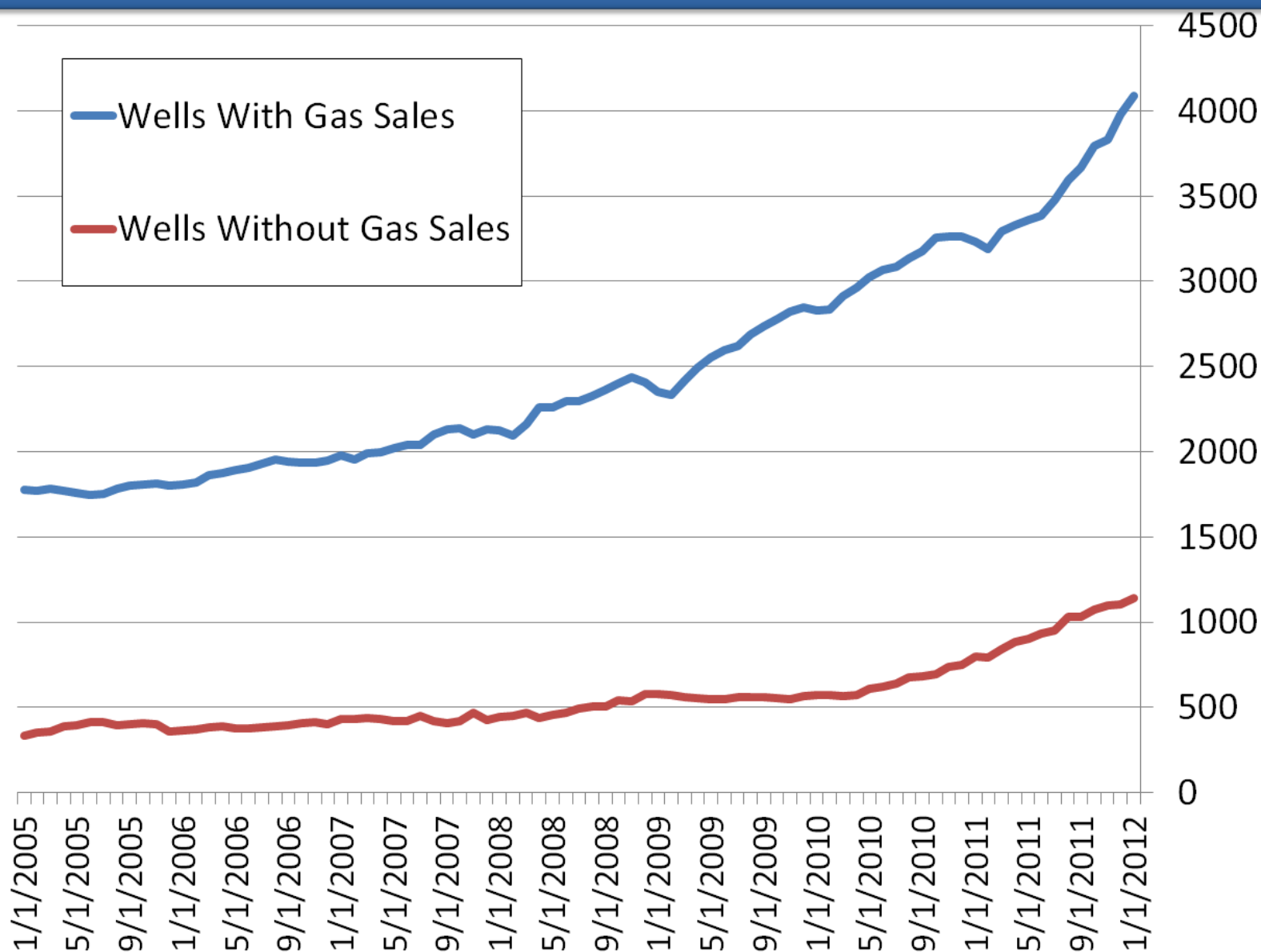
— Bear Paw — Northern Border — Whiting — Gas Processing Plant



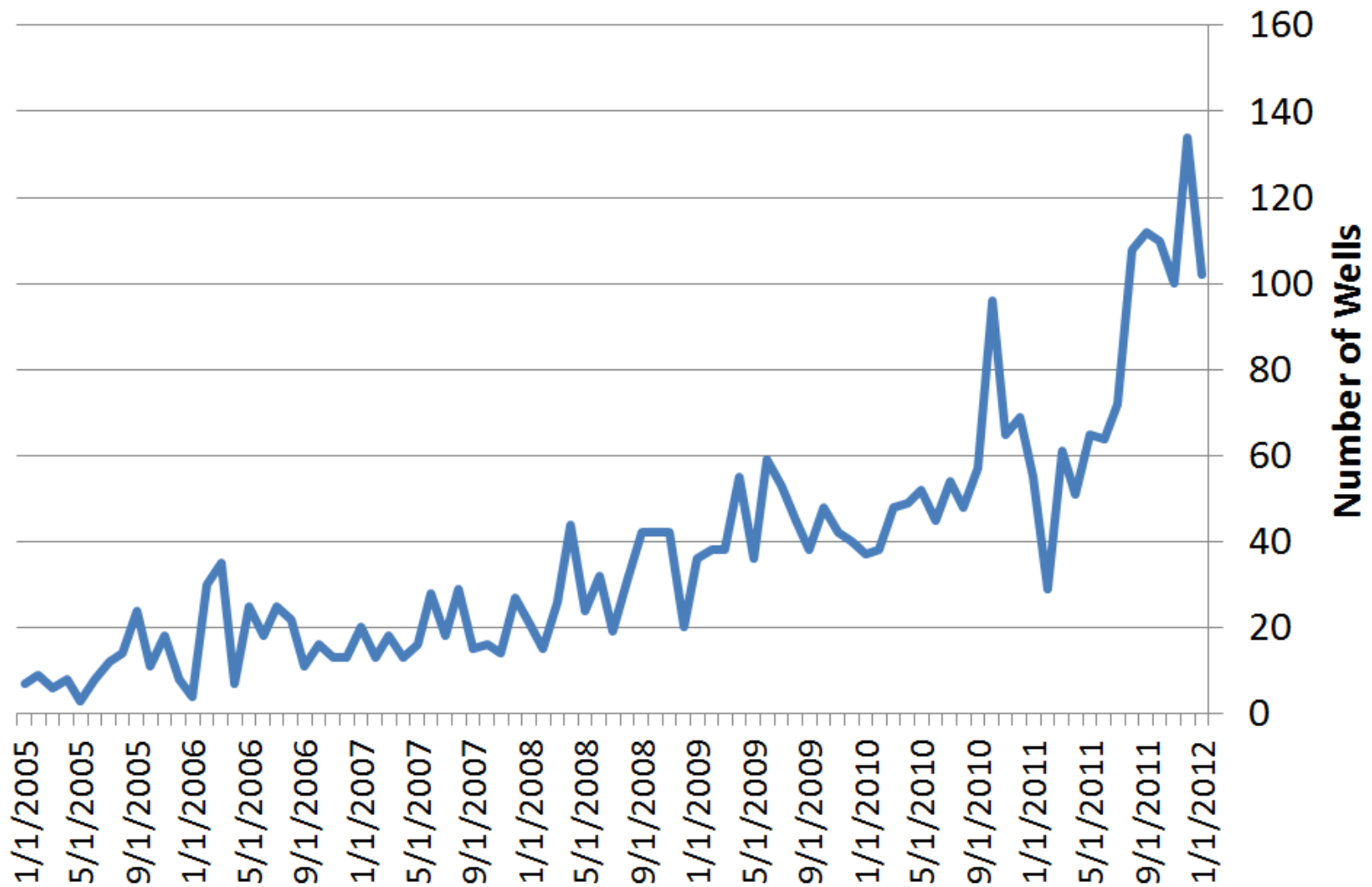
ND Gas Production



ND Gas Gathering Statistics

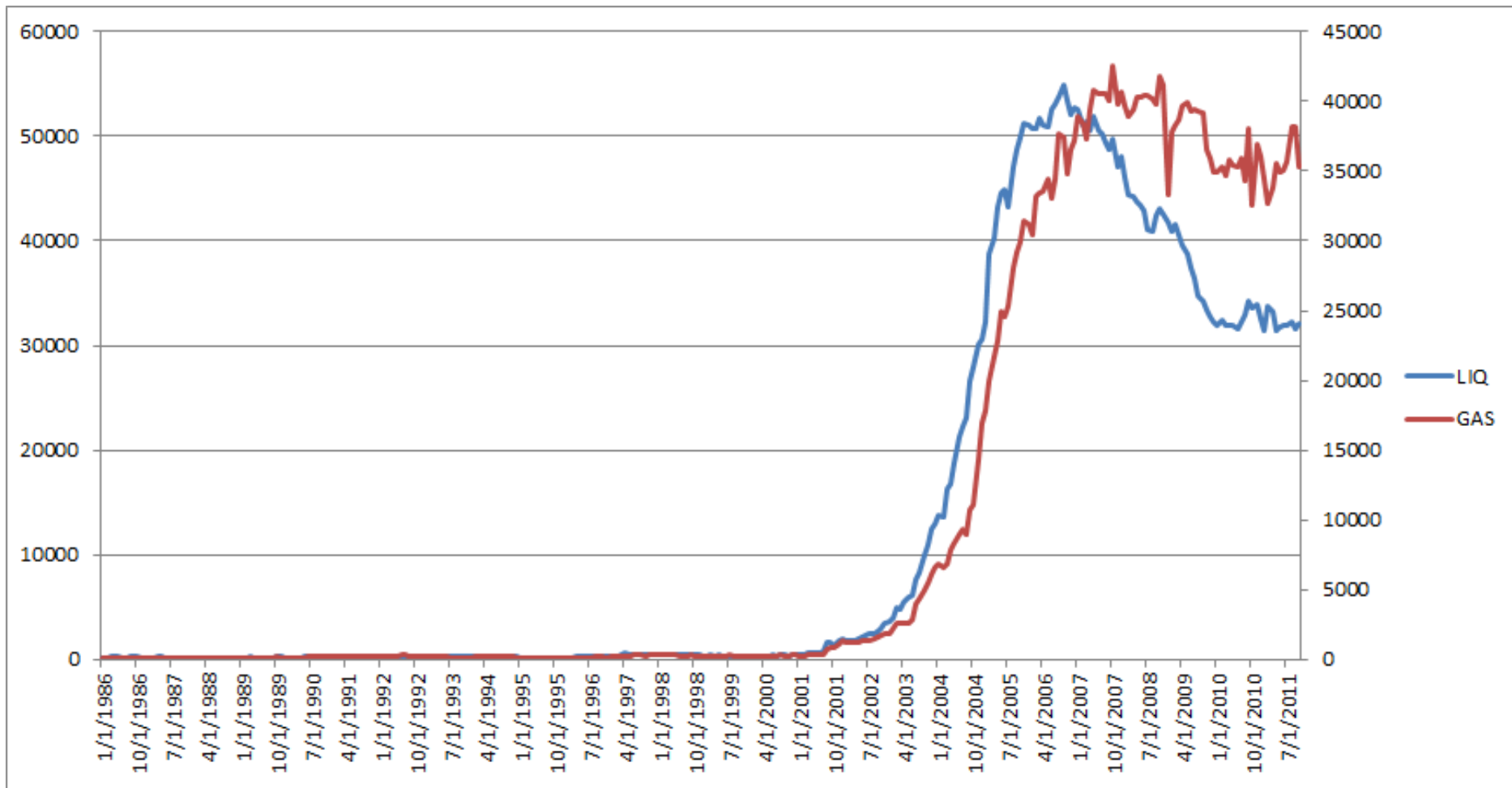


First Time Gas Sales Per Month



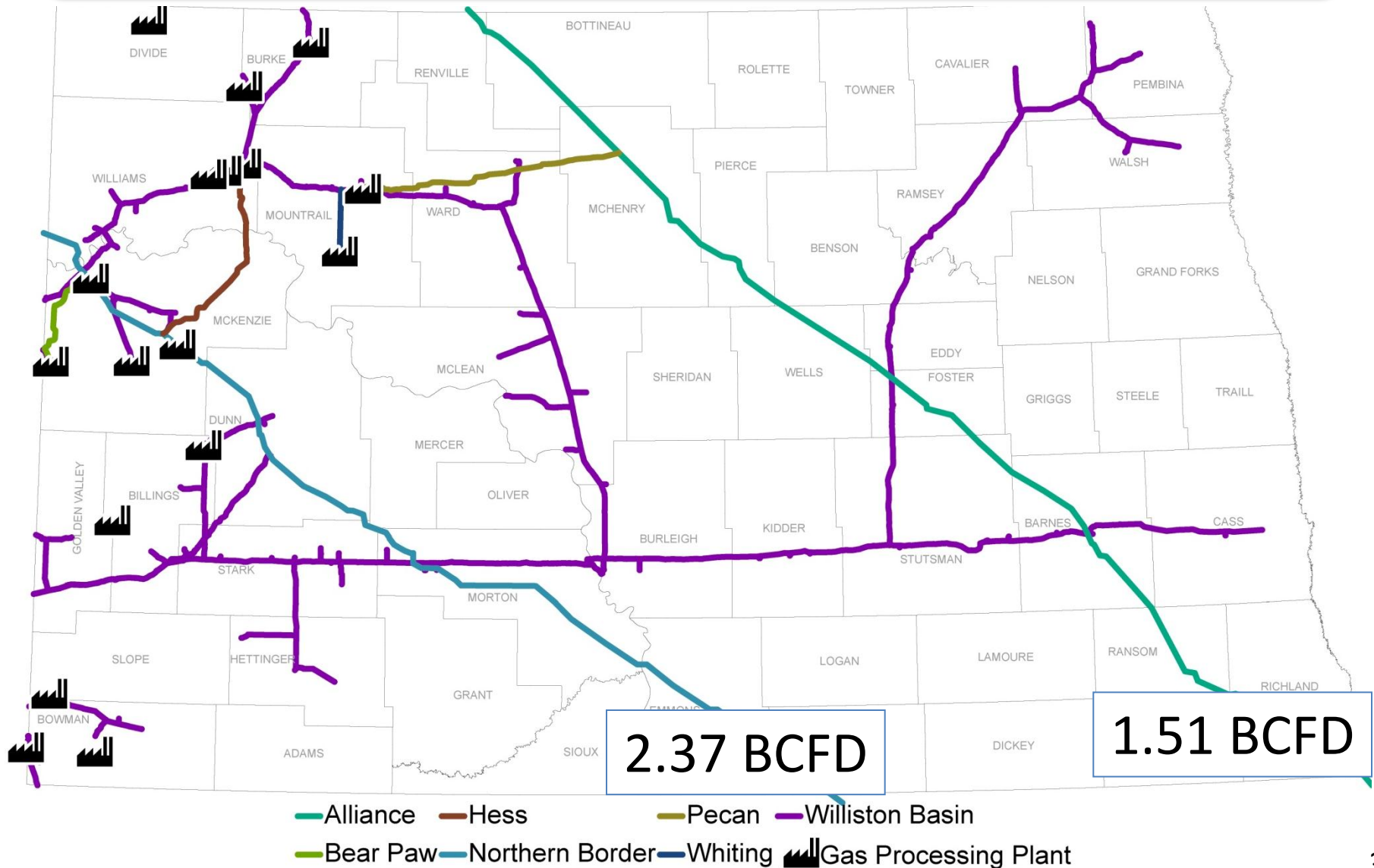
Natural Gas Study

Montana Bakken Production



Source: EPRINC – Left Axis Oil, BOPD – Right Axis Gas, MCFD

Gas Transmission Pipelines



Pipeline Safety



Know what's below.
Call before you dig.

Contact Information

North Dakota Pipeline Authority

600 E. Boulevard Ave. Dept. 405
Bismarck, ND 58505-0840

Phone: (701)220-6227

Fax: (701)328-2820

E-mail: jjkringstad@ndpipelines.com

Website:

www.pipeline.nd.gov



Know what's below.
Call before you dig.

