



# **March 2015 Monthly Update**

## **North Dakota Pipeline Authority**

### **Justin J. Kringstad**

#### **March 12, 2015 - Bismarck, ND**

# US Williston Basin Oil Production - 2015

MONTH	ND	Eastern MT*	SD	TOTAL
January	1,190,511		4,686	--
February				--
March				--
April				--
May				--
June				--
July				--
August				--
September				--
October				--
November				--
December				--

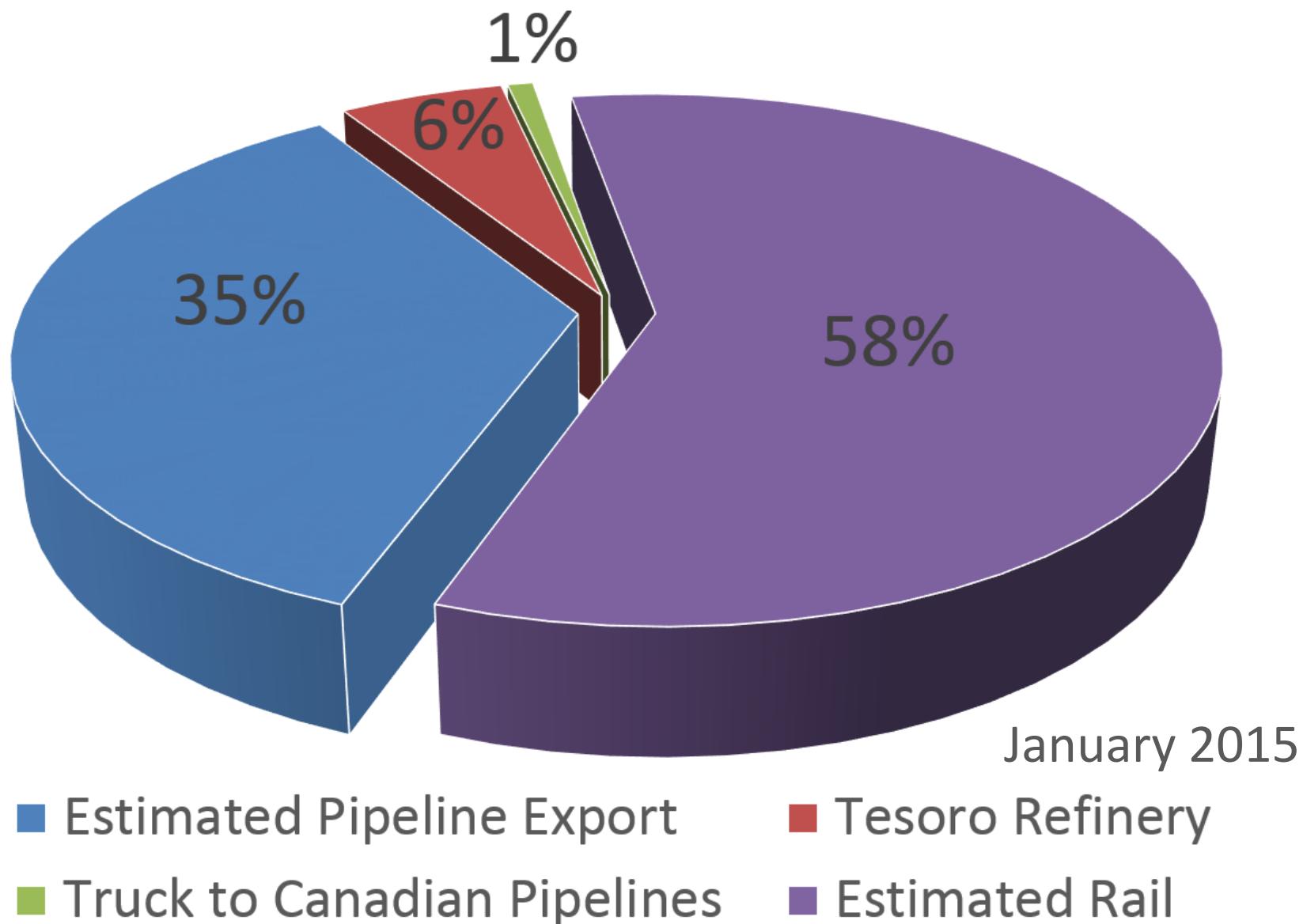


# US Williston Basin Oil Production - 2014

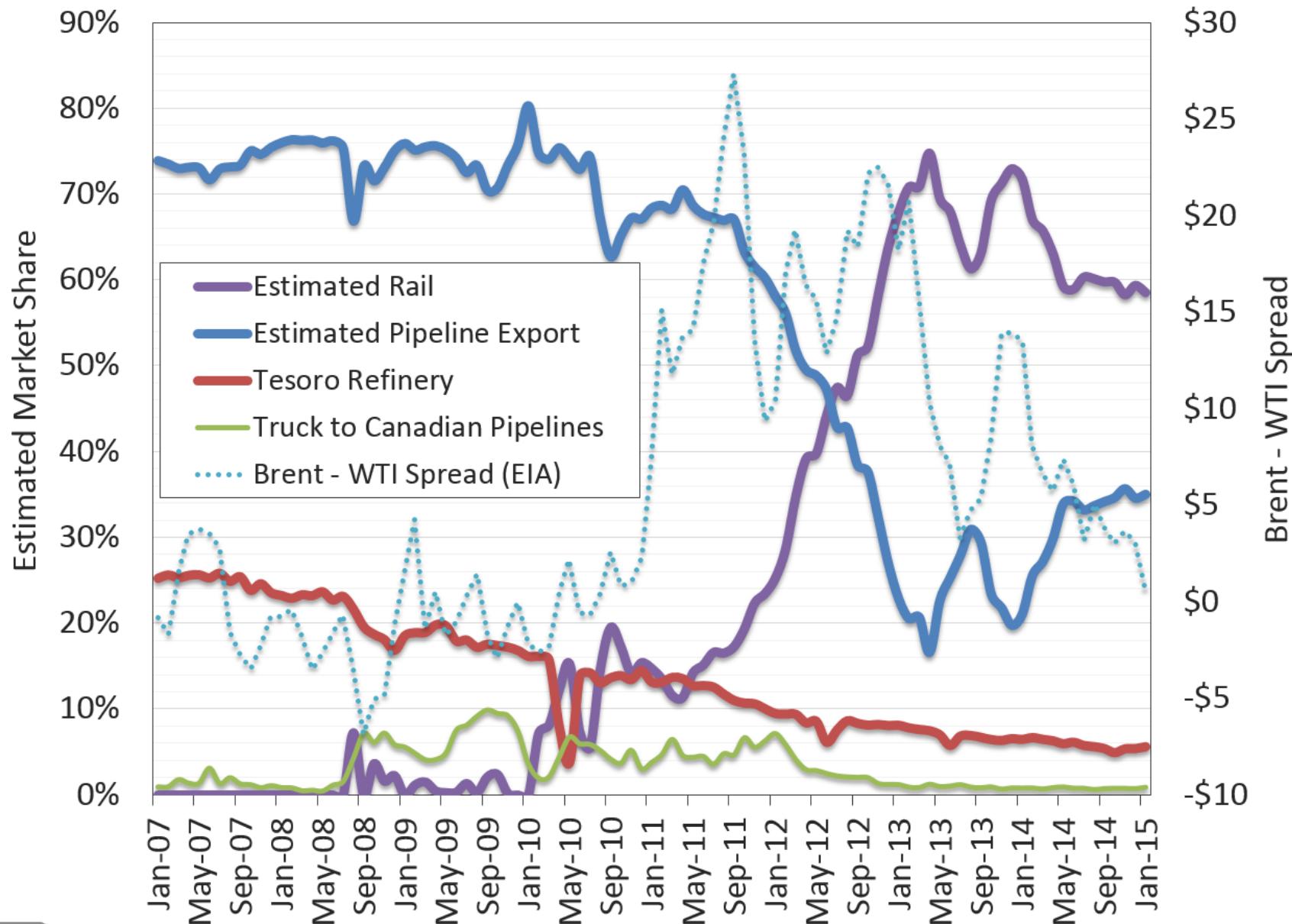
MONTH	ND	Eastern MT*	SD	TOTAL
January	937,200	71,664	5,065	1,013,929
February	953,305	73,667	4,936	1,031,908
March	976,798	73,104	4,946	1,054,848
April	1,004,255	74,681	4,806	1,083,742
May	1,040,625	72,794	4,734	1,118,153
June	1,092,922	74,995	4,841	1,172,758
July	1,114,521	76,853	4,882	1,196,255
August	1,132,842	76,260	4,734	1,213,835
September	1,186,328	75,798	4,784	1,266,910
October	1,183,586	78,094	4,659	1,266,339
November	1,188,258	78,119	4,691	1,271,069
December	1,227,483		4,772	--



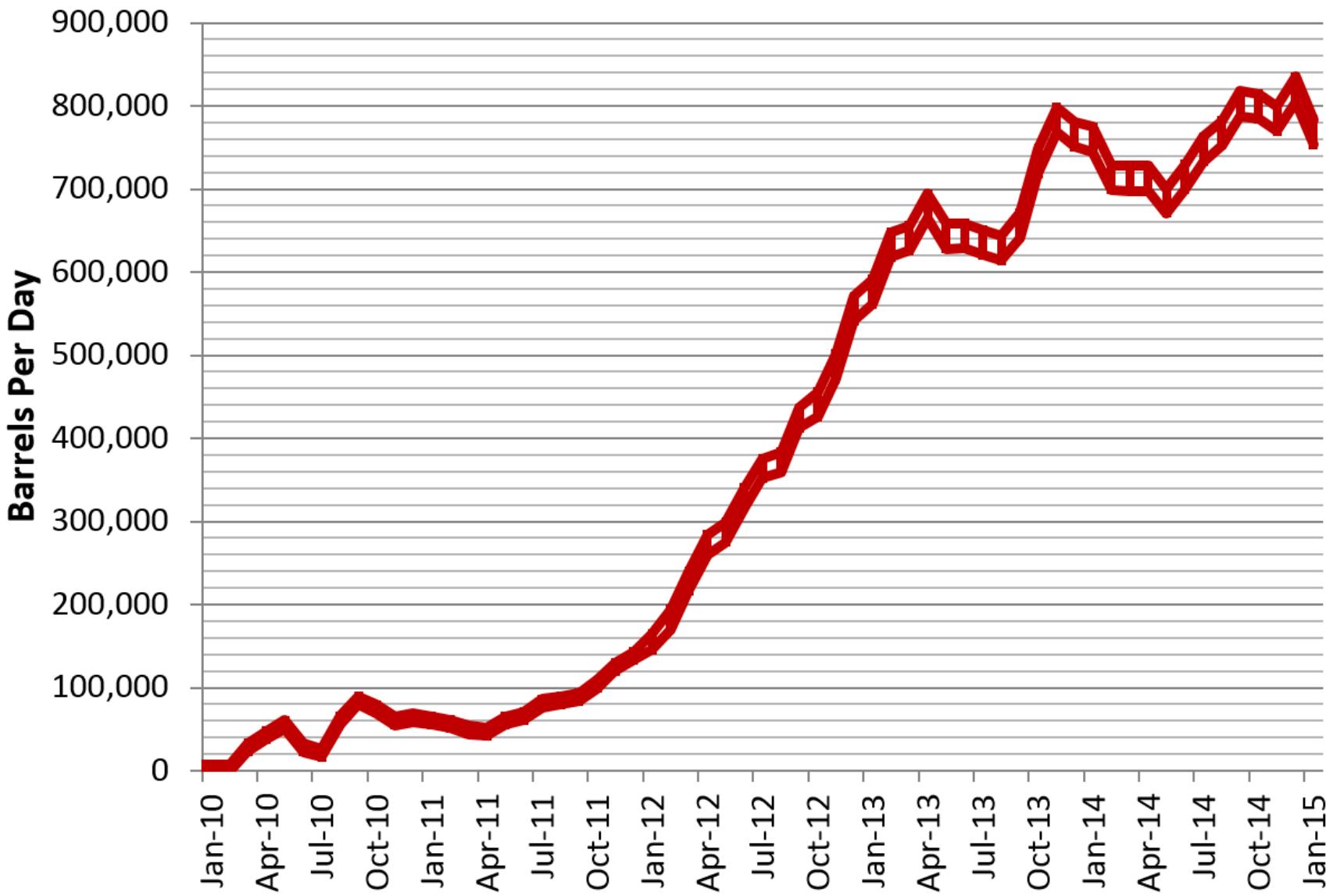
# Estimated Williston Basin Oil Transportation



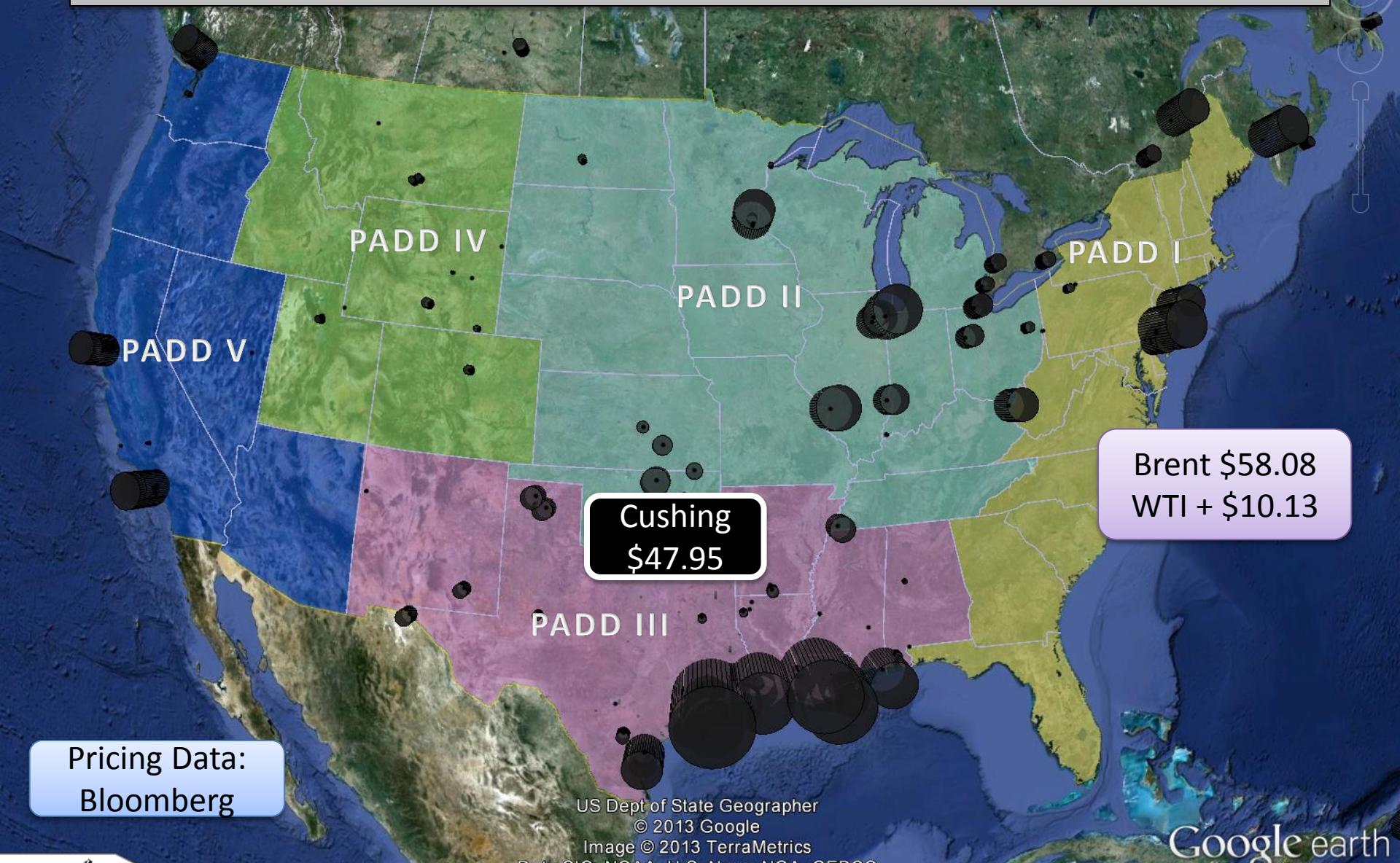
# Estimated Williston Basin Oil Transportation



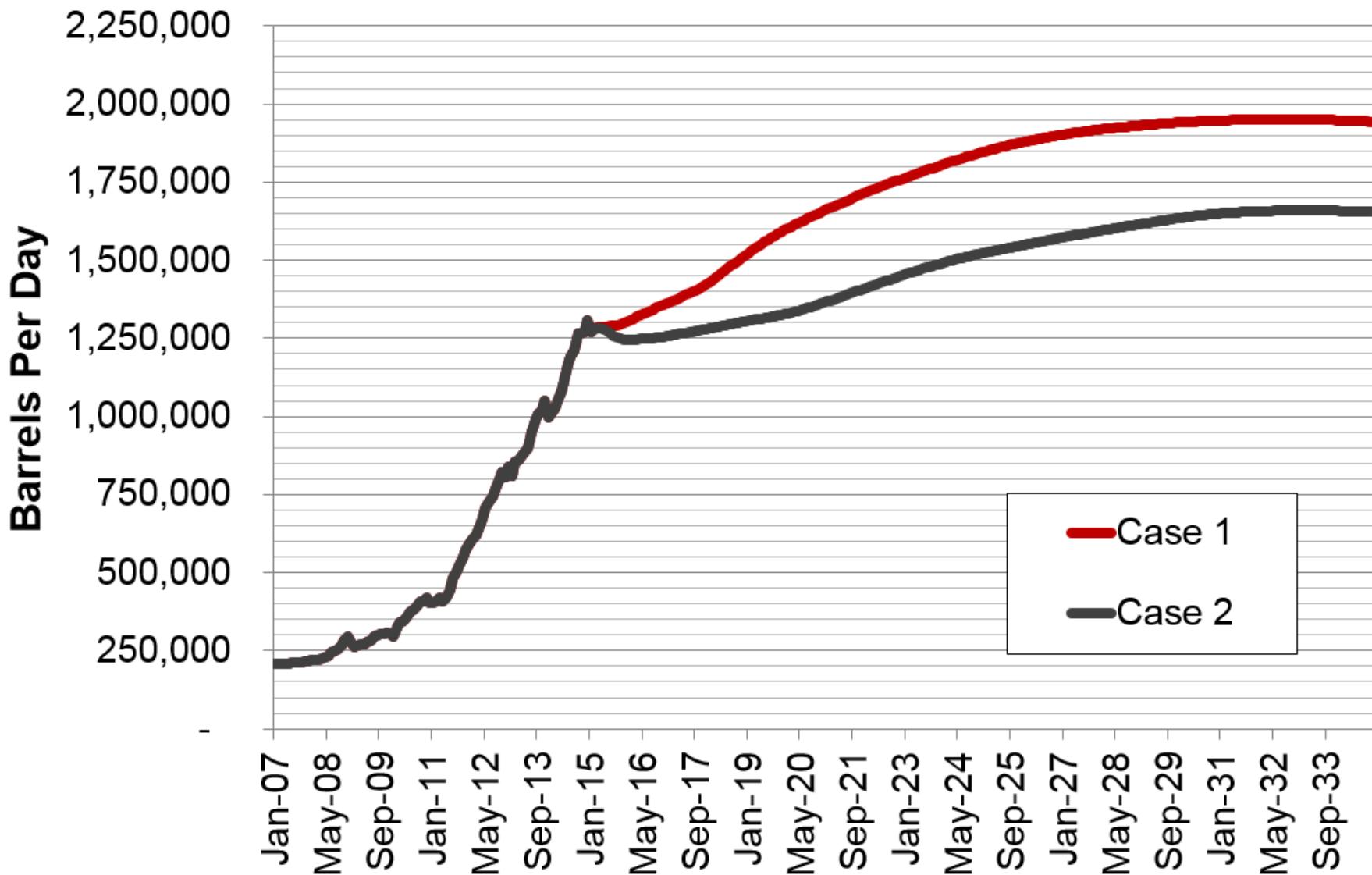
# Estimated ND Rail Export Volumes



# Crude Oil Prices – Mar. 12, 2015



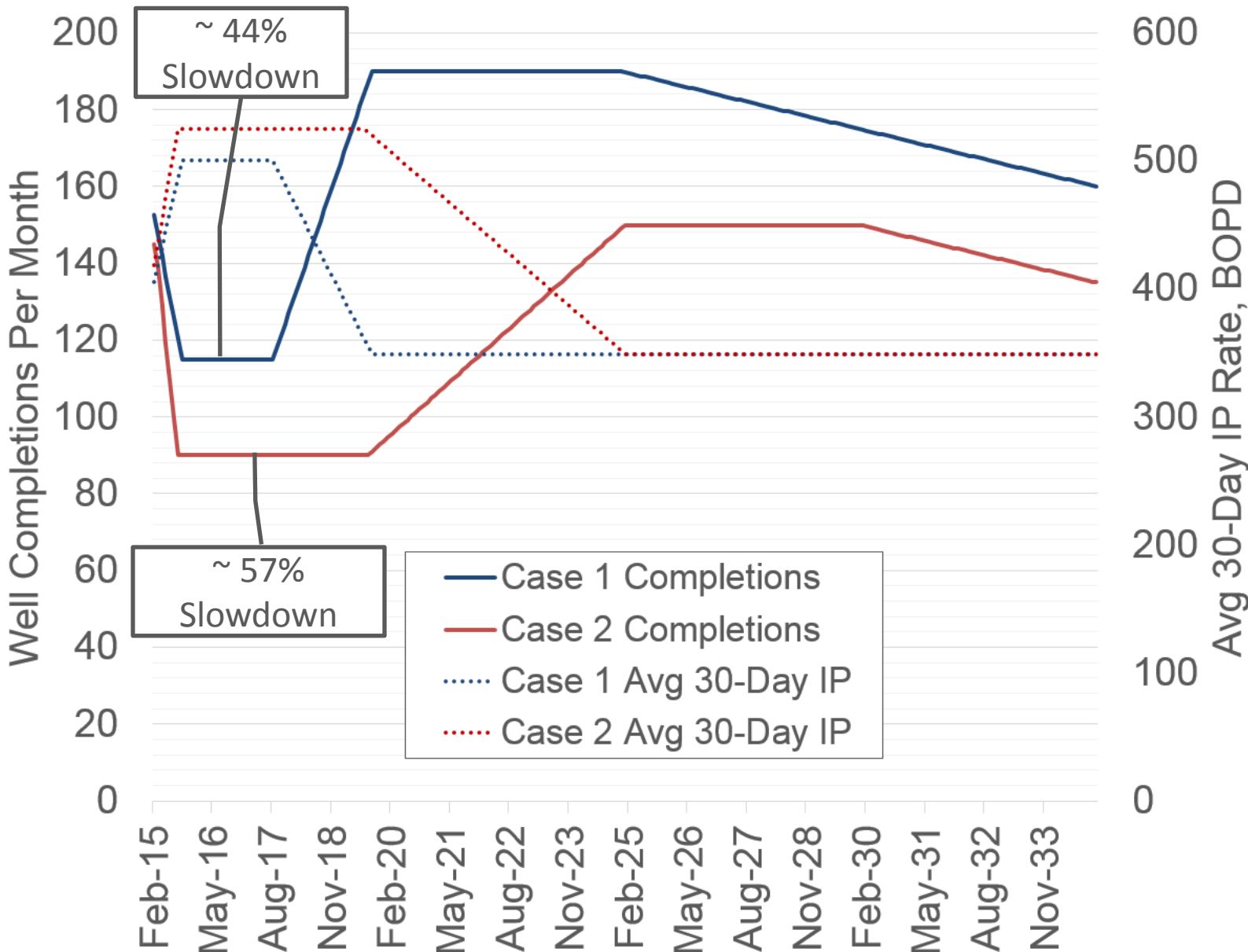
# Forecasting Williston Basin Oil Production, BOPD



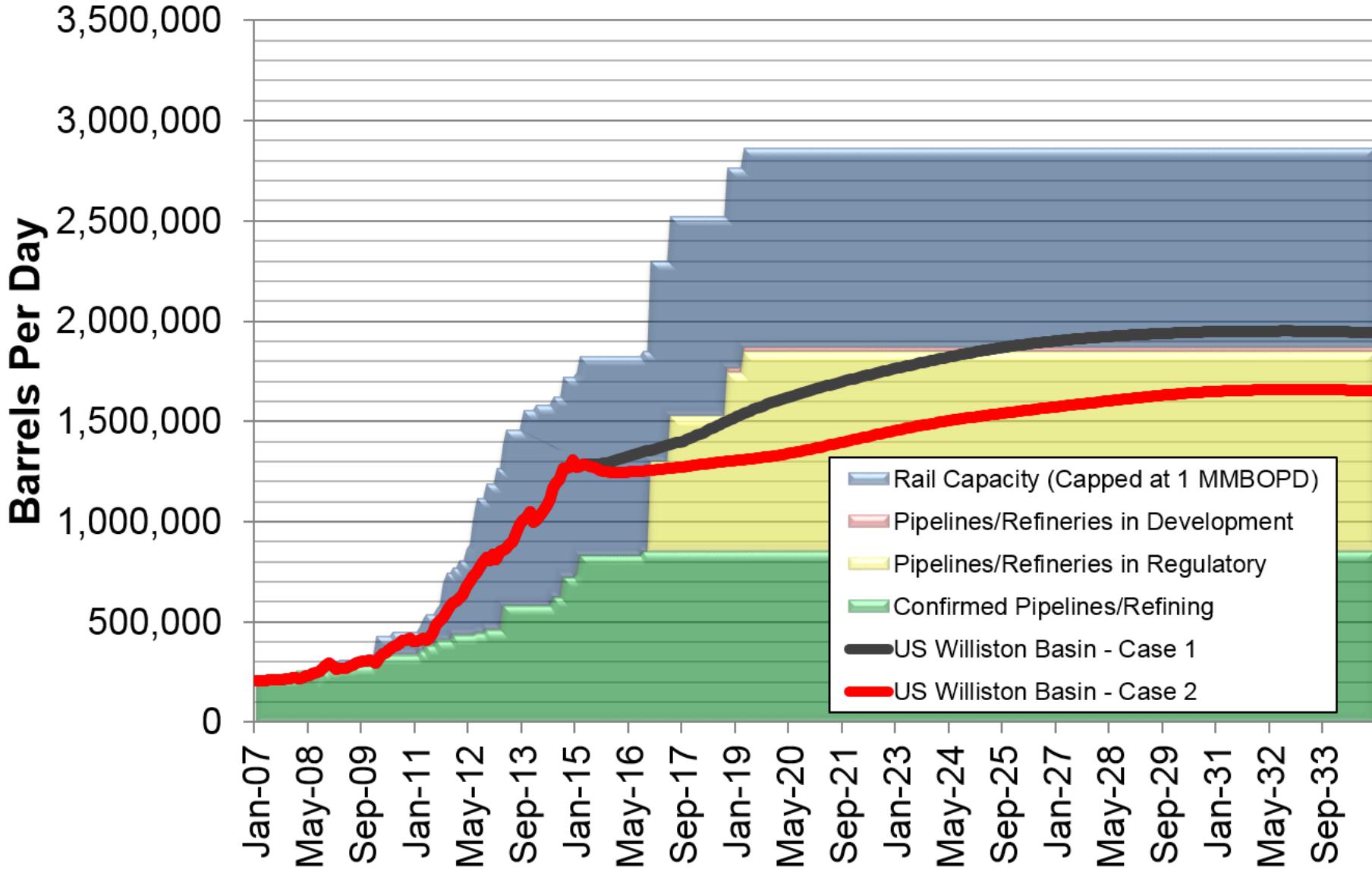
*Production forecast is for visual demonstration purposes only and should not be considered accurate for any near or long term planning.*



# Forecasting Assumptions



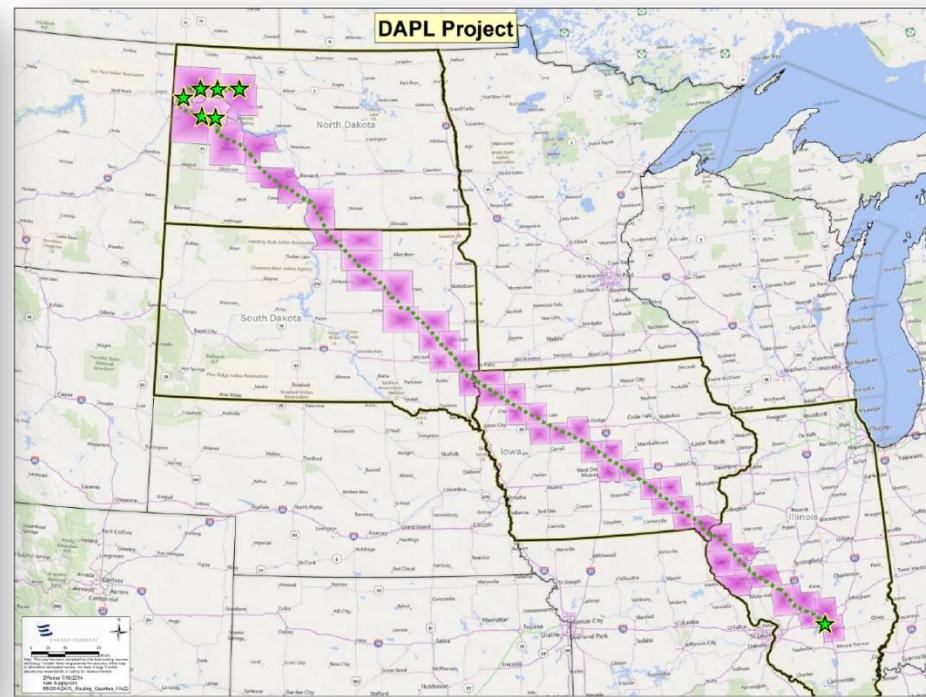
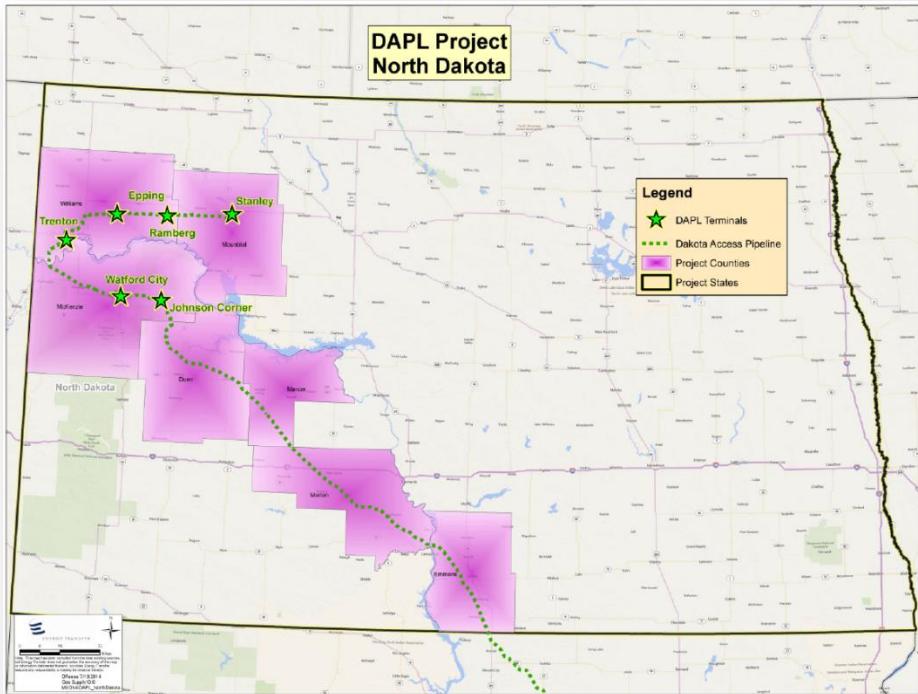
# Williston Basin Oil Production & Export Capacity, BOPD



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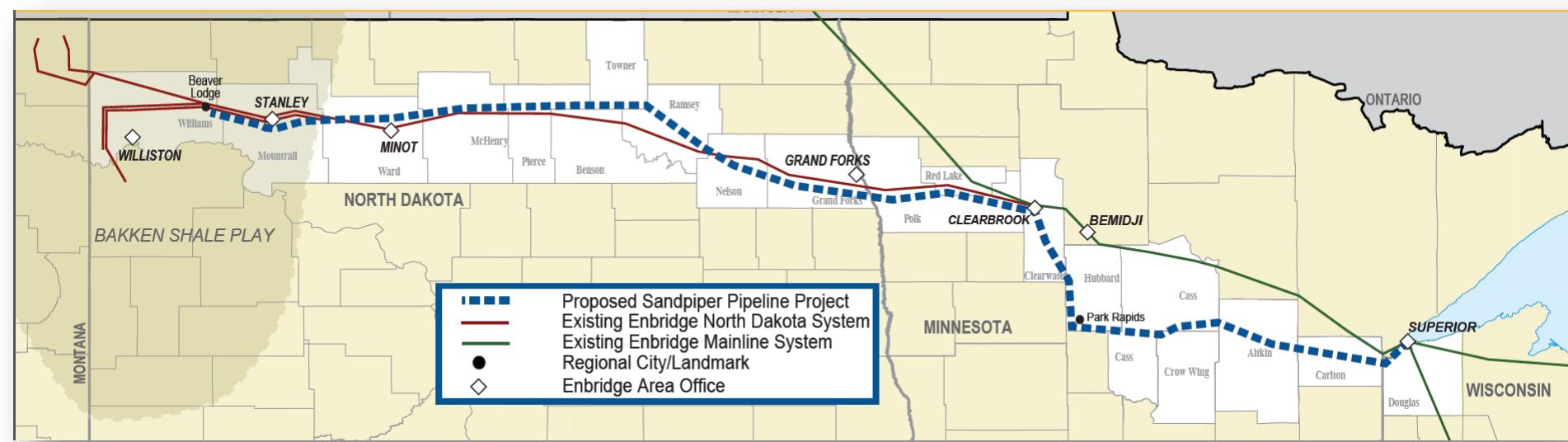
# Energy Transfer Partners: Dakota Access



- Successful Open Season During the First Half of 2014
- 450,000 BOPD Capacity to Patoka, IL (30")
- Expandable Up To 570,000 BOPD if Shipper Demand Exists
- Target In-service Date: Late 2016



# Sandpiper Pipeline



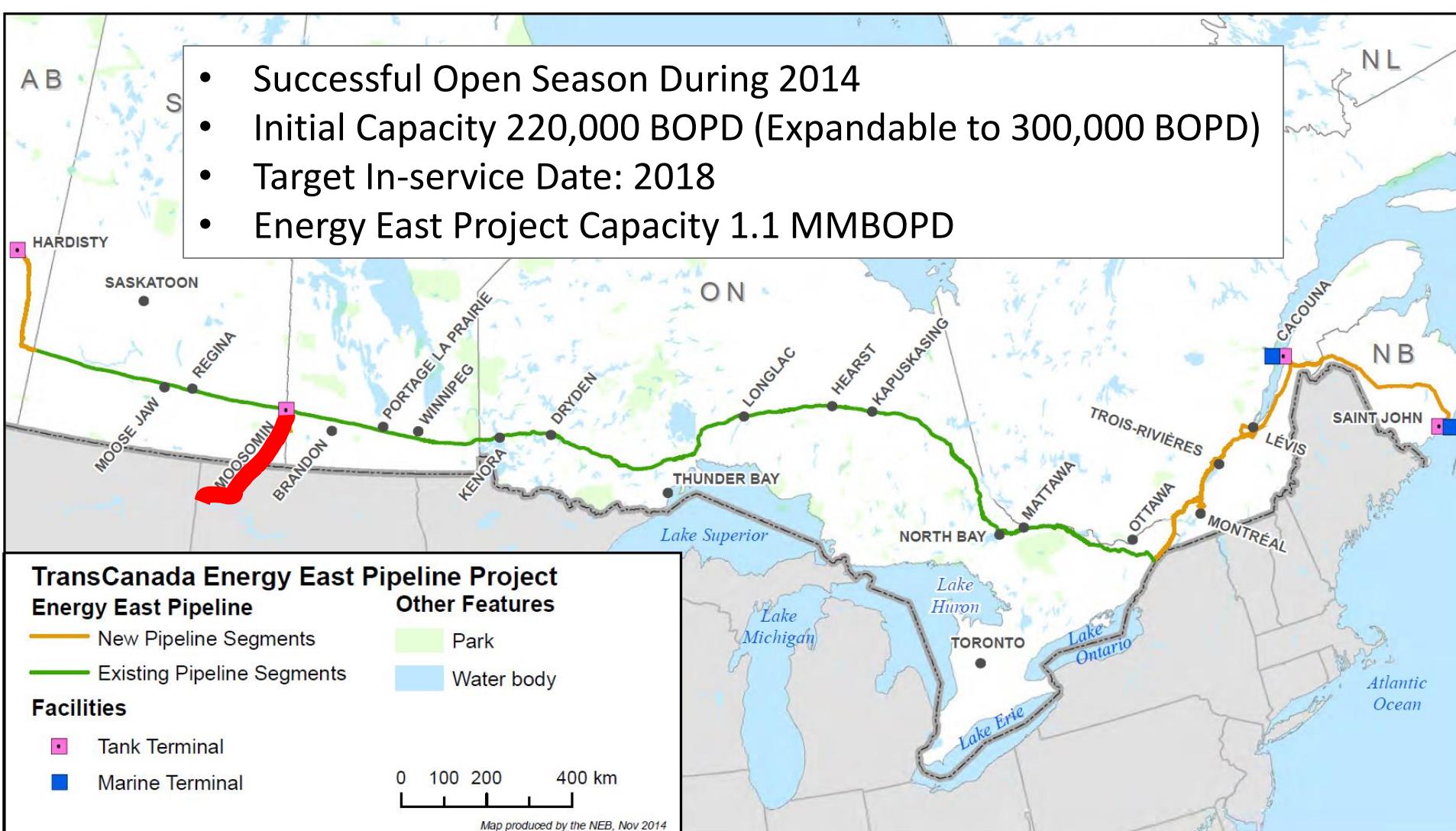
North Dakota Pipeline Company LLC - formerly known as Enbridge Pipelines (North Dakota) LLC

- Open Season Dates: November 26, 2013 – January 24, 2014
- 225,000 BOPD ND Capacity to Clearbrook, MN (24")
- 375,000 BOPD Clearbrook, MN to Superior, WI (30")
- Target In-service Date: Q1 2017



# TransCanada: Upland Pipeline

- Successful Open Season During 2014
- Initial Capacity 220,000 BOPD (Expandable to 300,000 BOPD)
- Target In-service Date: 2018
- Energy East Project Capacity 1.1 MMBOPD



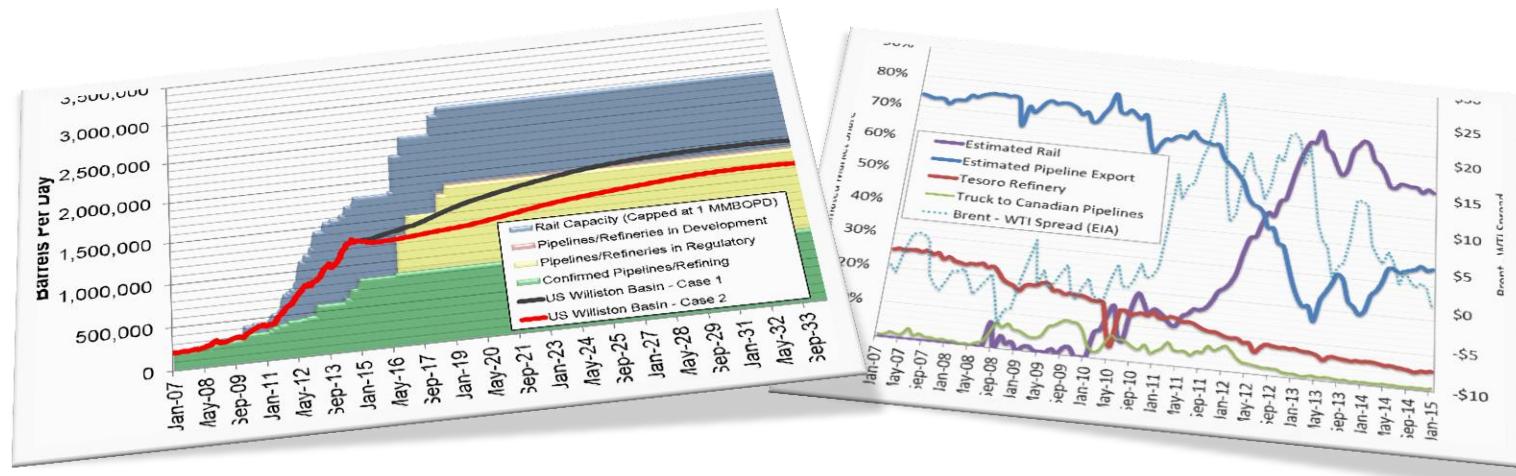
Map: NEB – NDPA Upland Addition



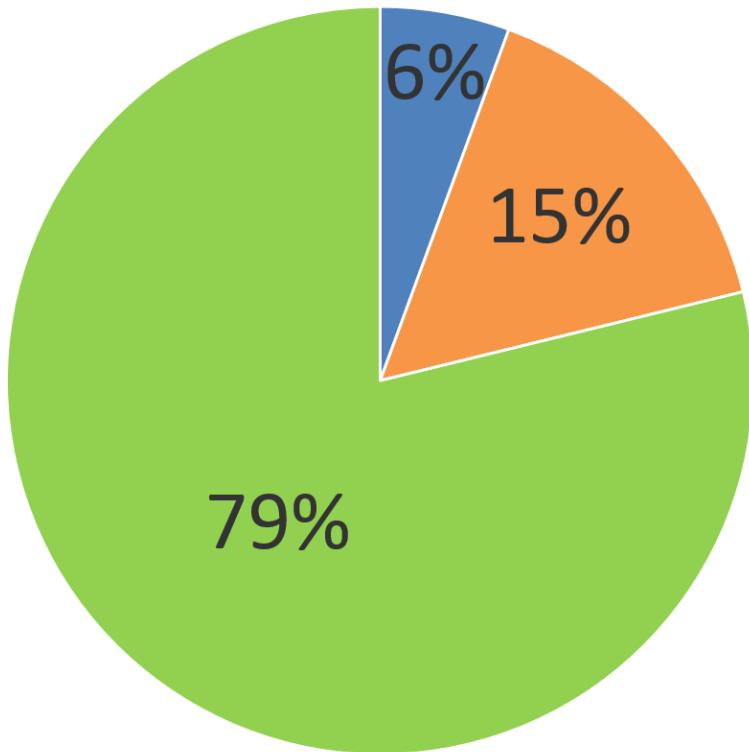
# Forecasting Future Market Share is Difficult

Predicting how future oil production will move with any degree of confidence is difficult/impossible due to:

- Future oil production uncertainty
- Shifting market conditions
- Project commitments are unknown (pipe & rail)
- Regulatory uncertainty (pipe & rail)



# Solving the Flaring Challenge



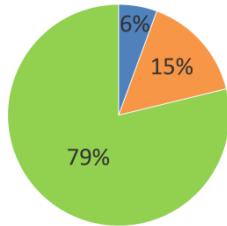
**GREEN** – % of gas captured and sold  
**Blue** – % flared from zero sales wells  
**Orange** – % flared from wells with at least one mcf sold.

## Simple Terms

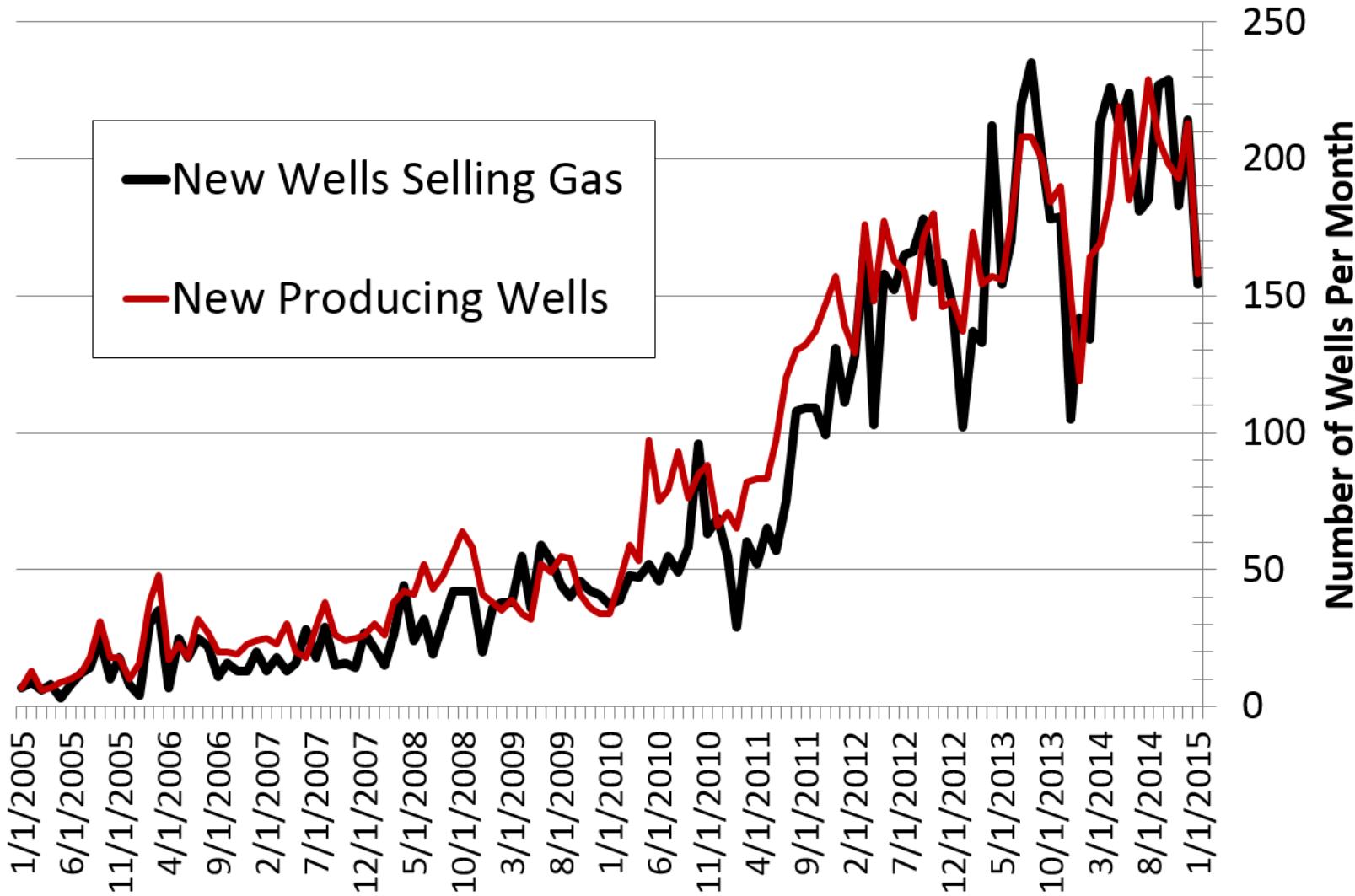
**Blue** – Lack of pipelines  
**Orange** – Challenges on existing infrastructure

Jan 2015 Data – Non-Confidential Wells

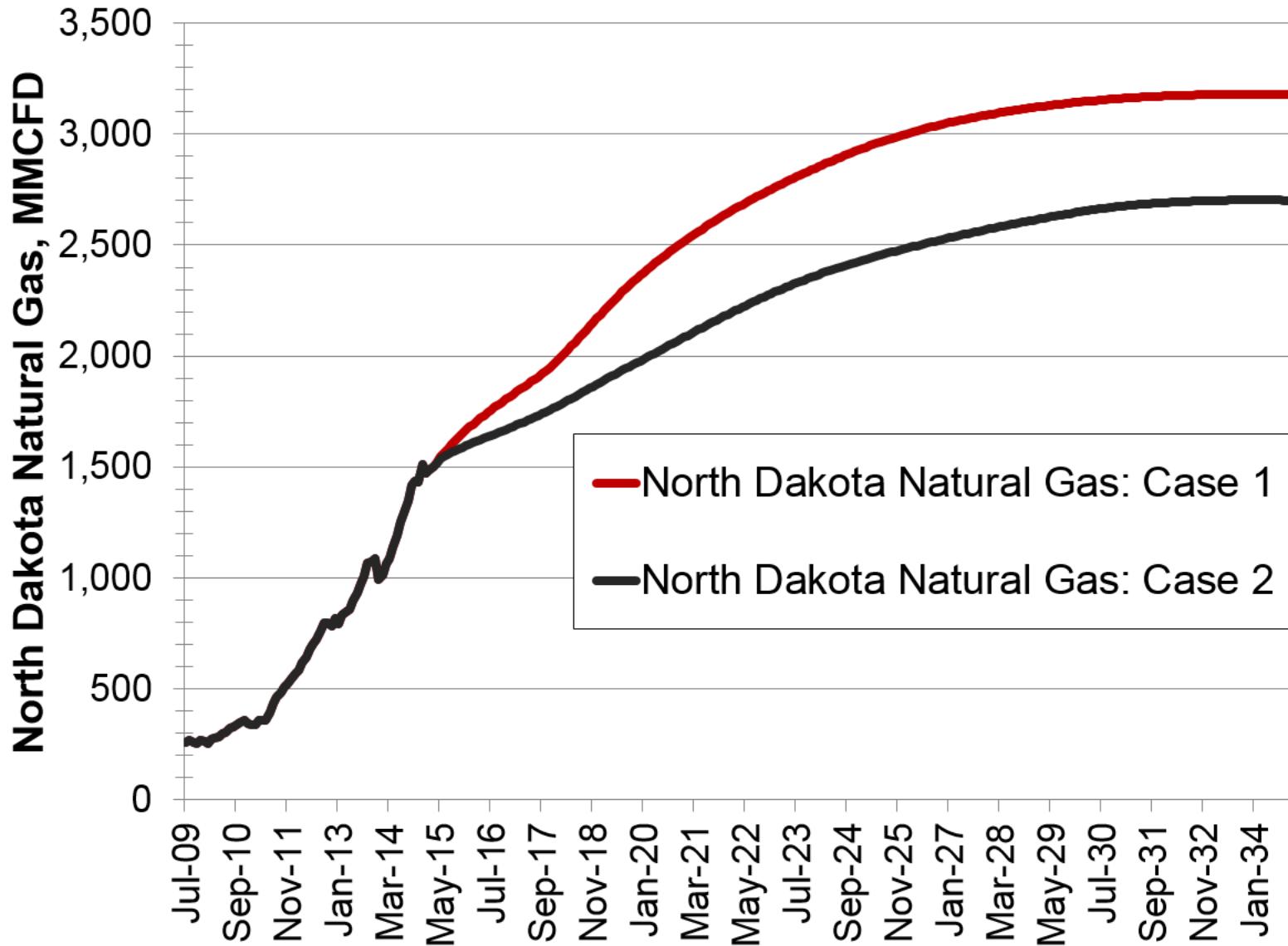




# Capturing the 6% Faster Well Connections



# North Dakota Natural Gas Forecast, MMCFD



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# Contact Information

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