



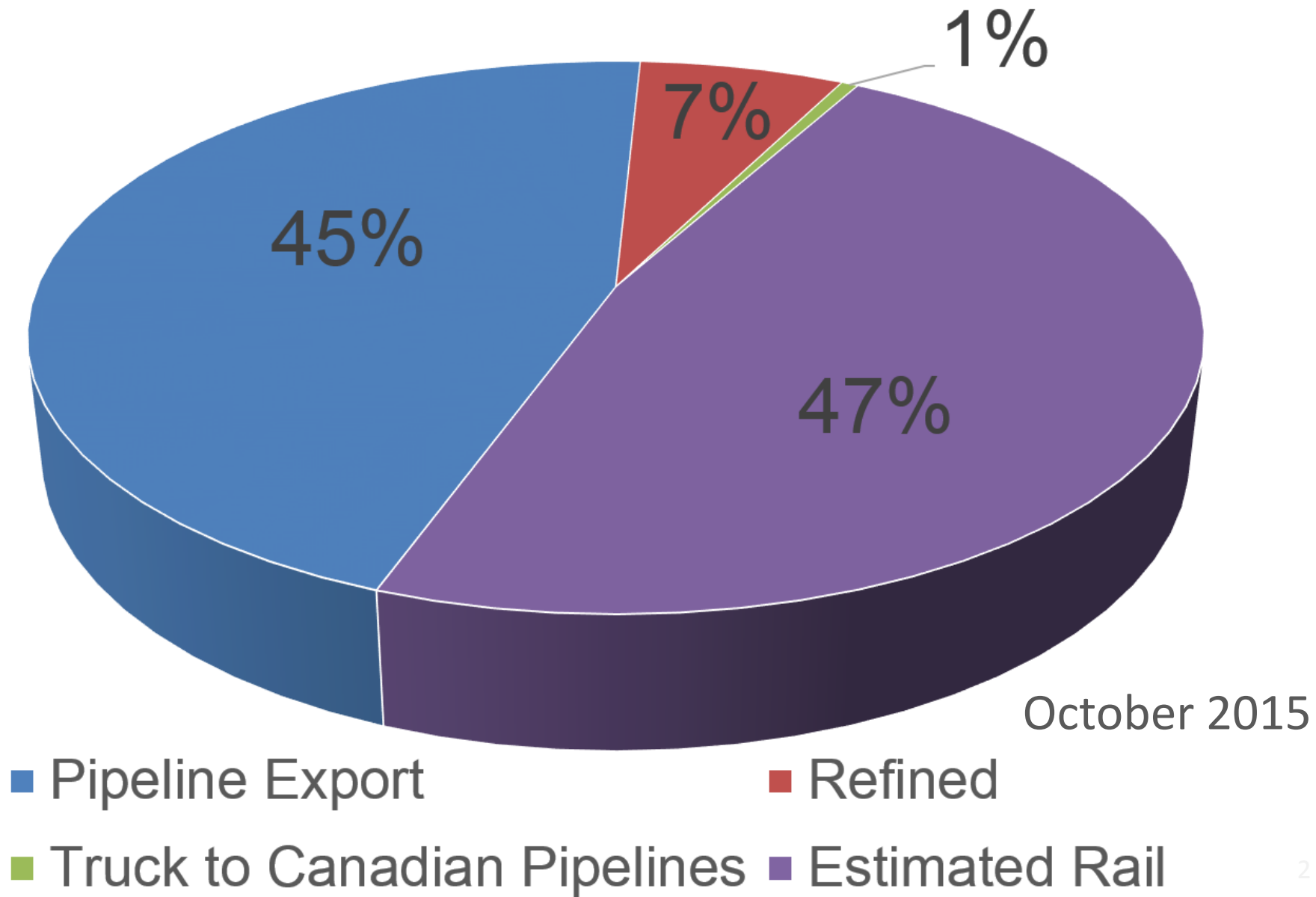
Industrial Commission Update

North Dakota Pipeline Authority

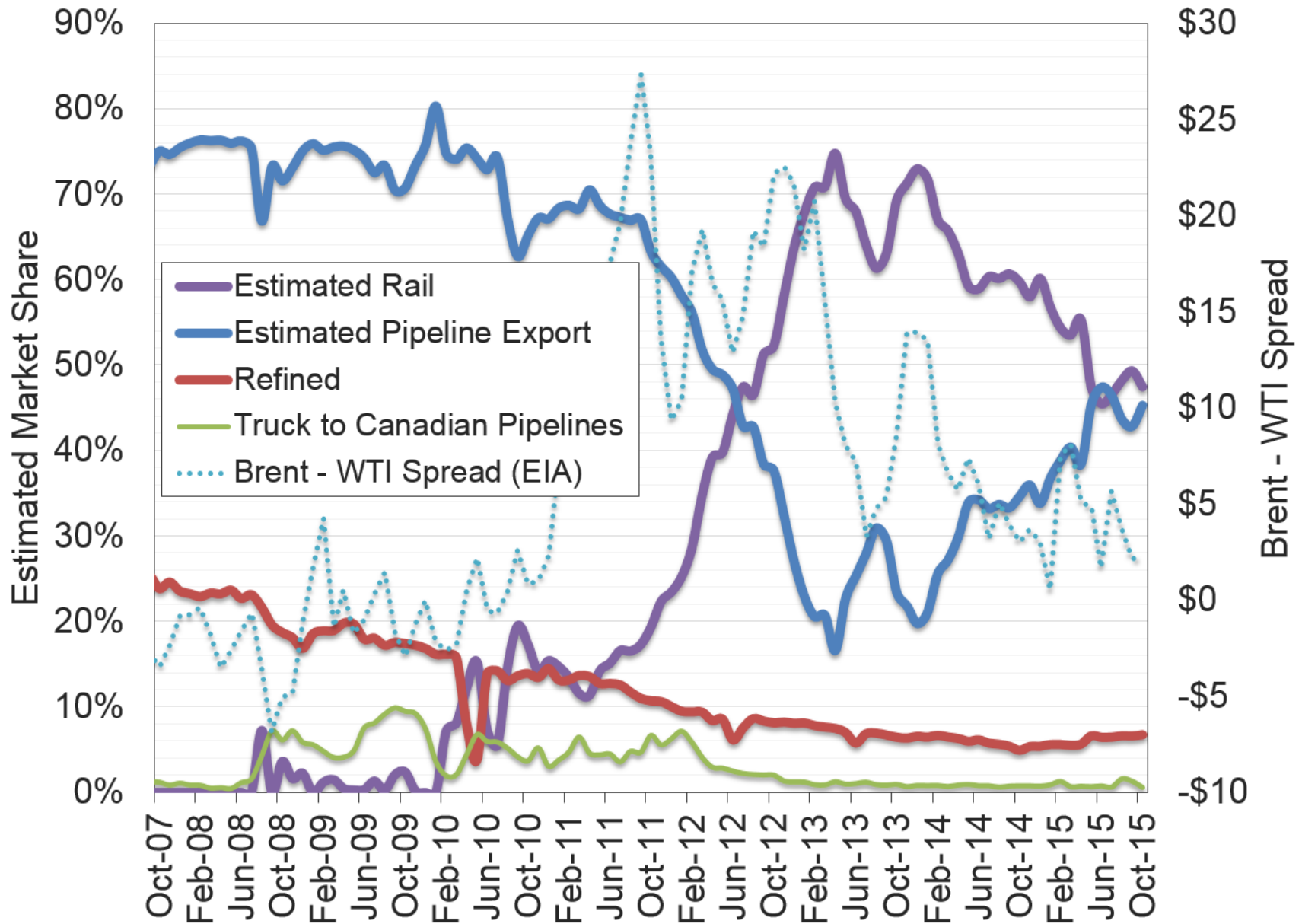
Justin J. Kringstad

January 11, 2016 - Bismarck, ND

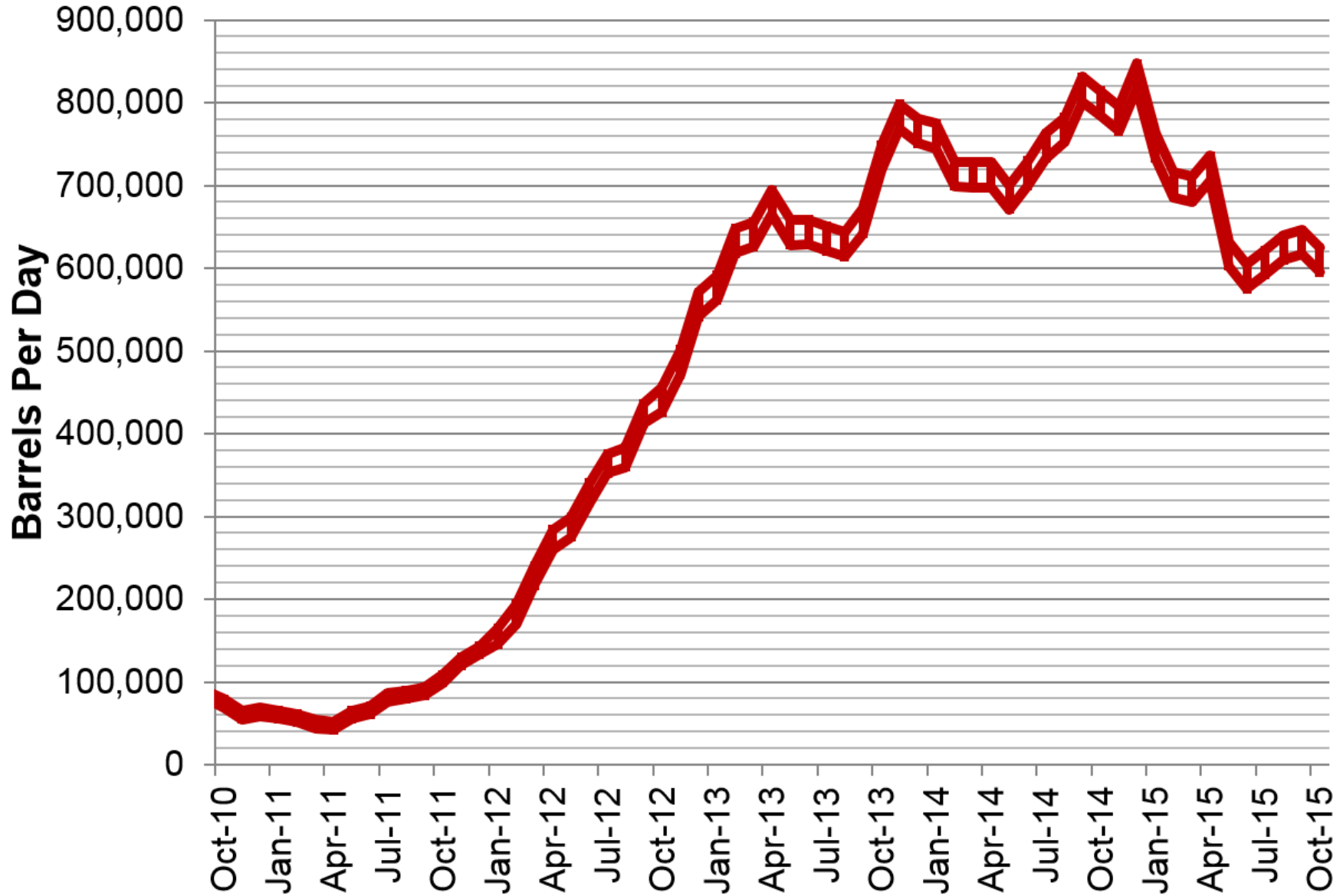
Estimated Williston Basin Oil Transportation



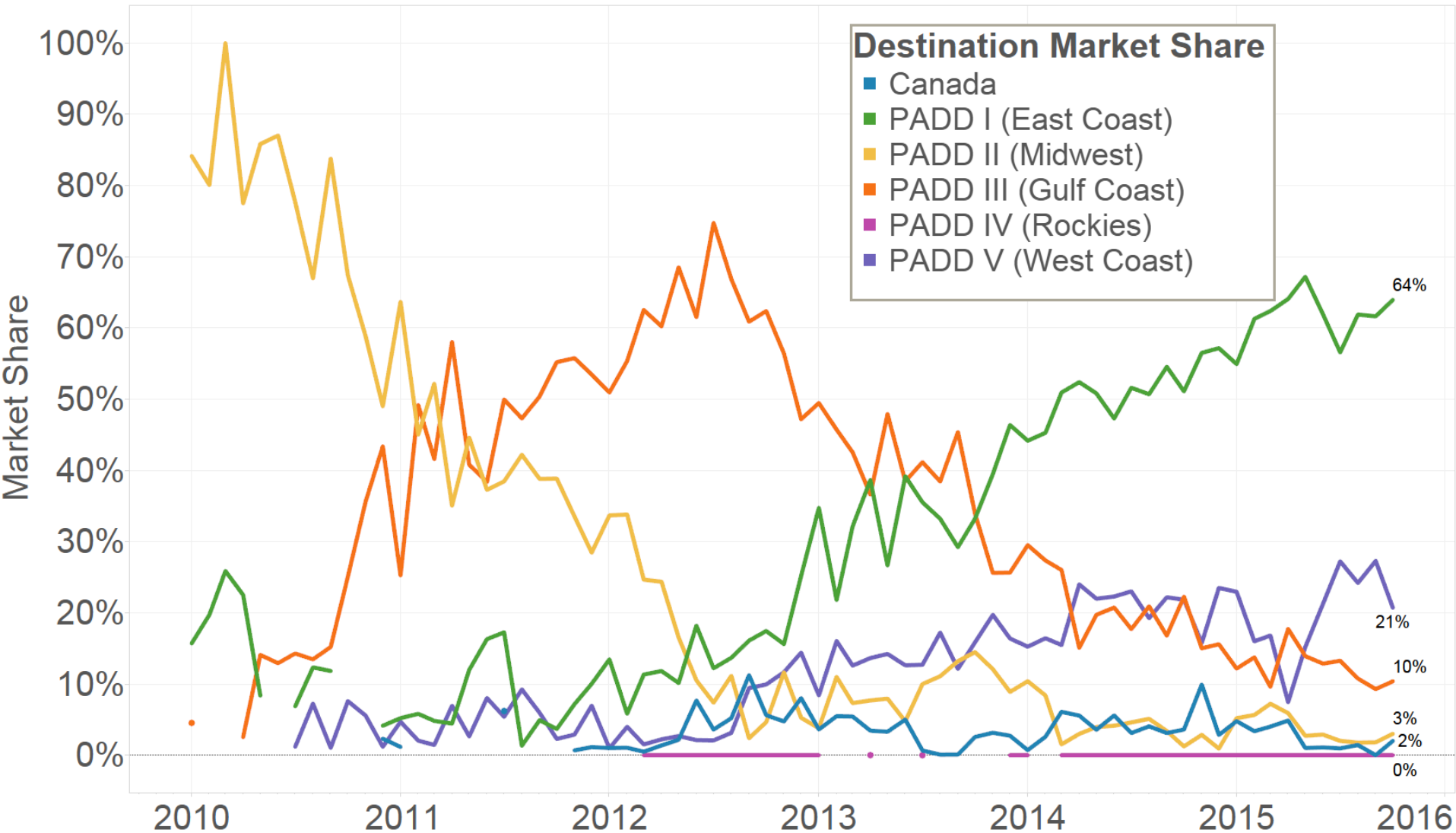
Estimated Williston Basin Oil Transportation



Estimated ND Rail Export Volumes



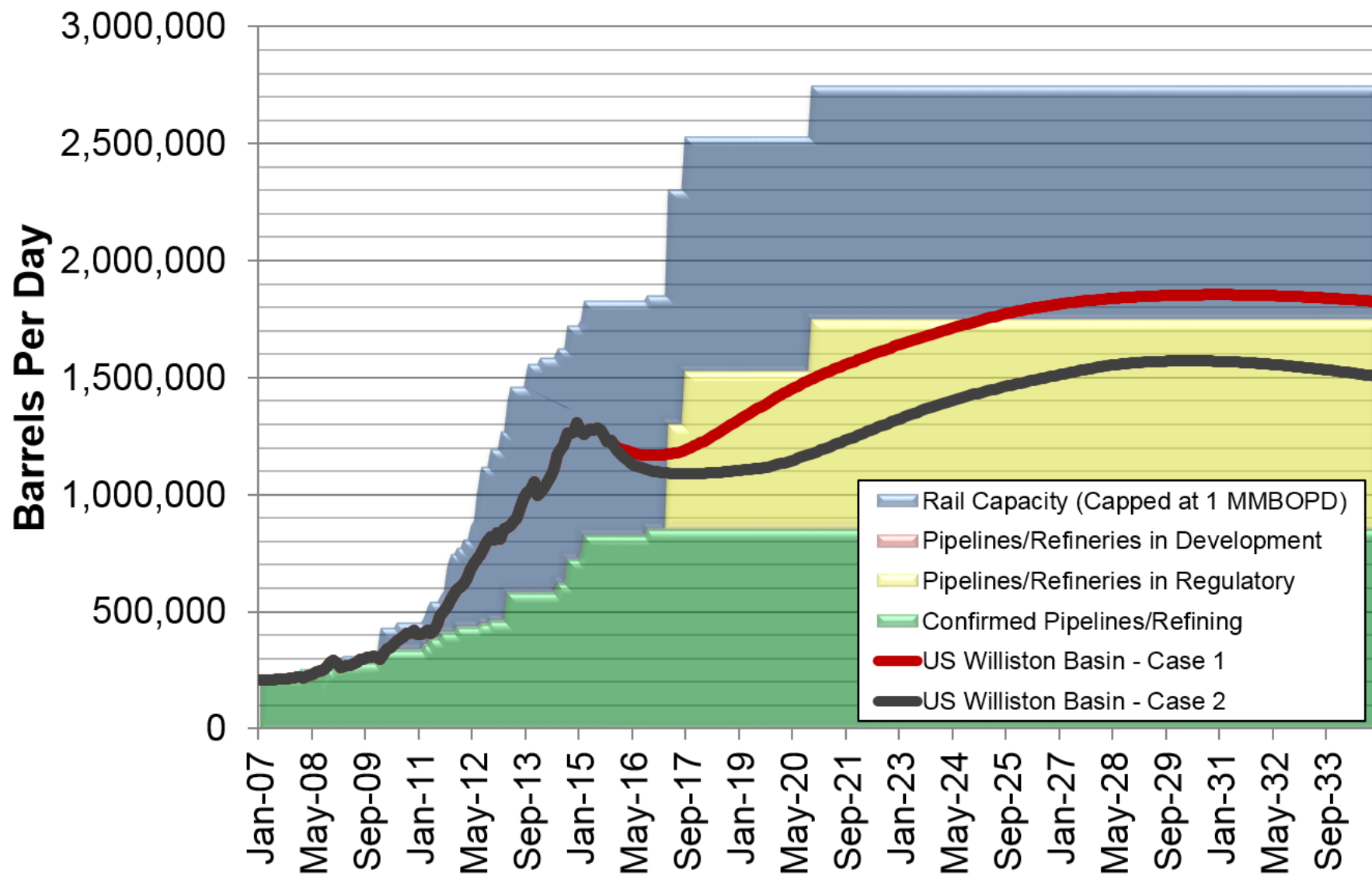
Rail Destinations Market Share (Oct 2015)



Data for Rail Destination Market Share Provided by the US Energy Information Administration



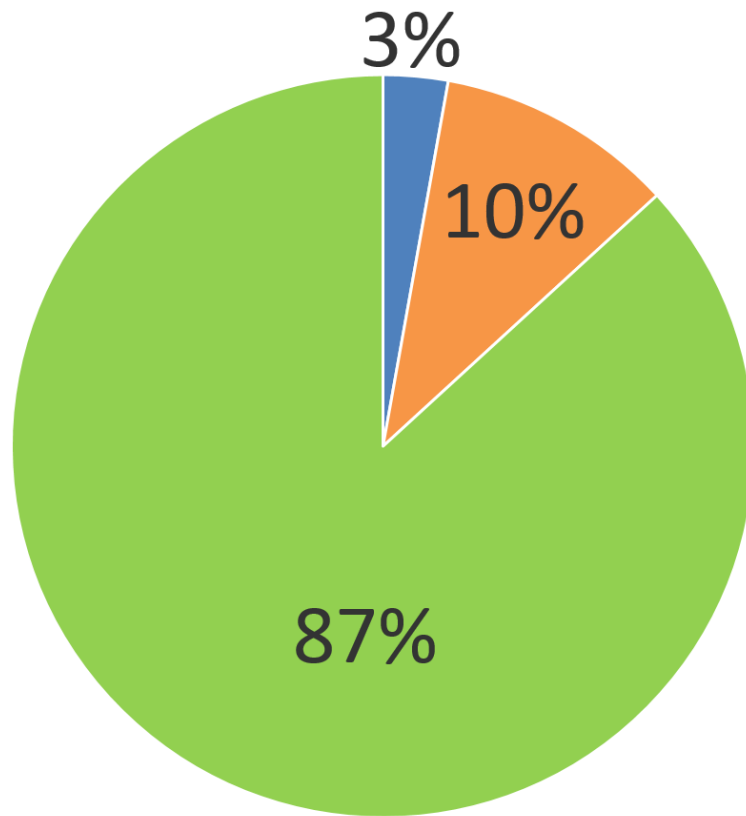
Williston Basin Oil Production & Export Capacity, BOPD



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



Solving the Flaring Challenge



Statewide

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

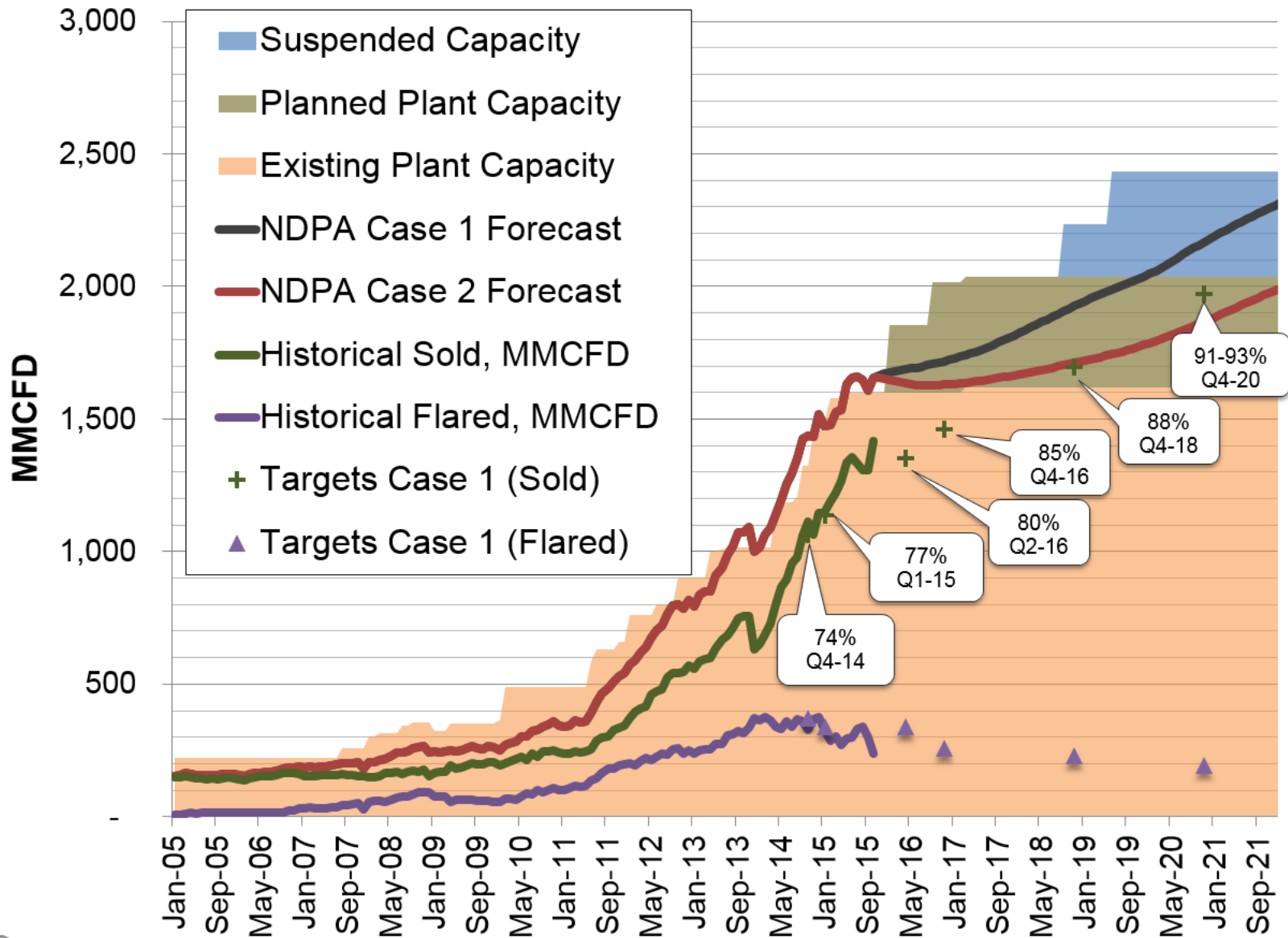
Simple Terms

Blue – Lack of pipelines
Orange – Challenges on existing infrastructure

October 2015 Data – Non-Confidential Wells



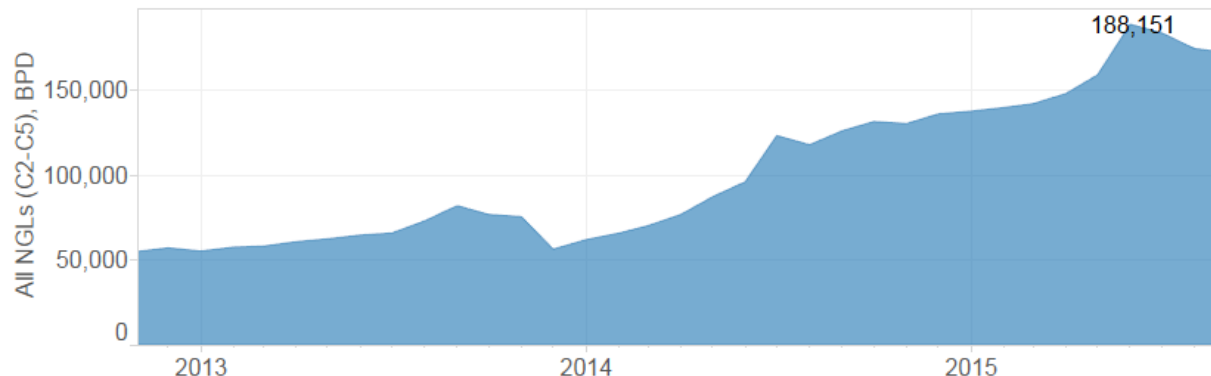
Solving the Flaring Challenge



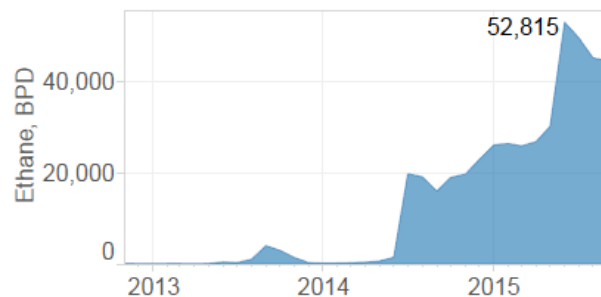
ND Gas Plant NGL Production, BPD

Through Sep 2015 - Peak Values Shown

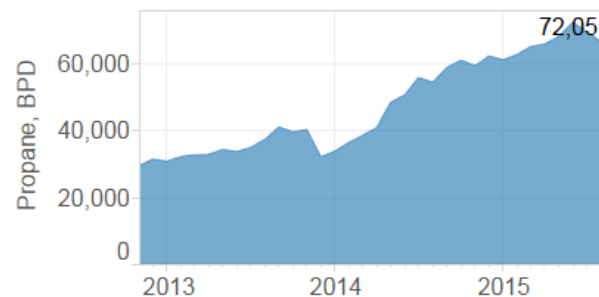
All NGLs



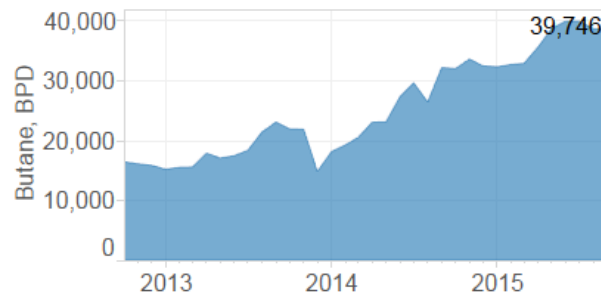
Ethane



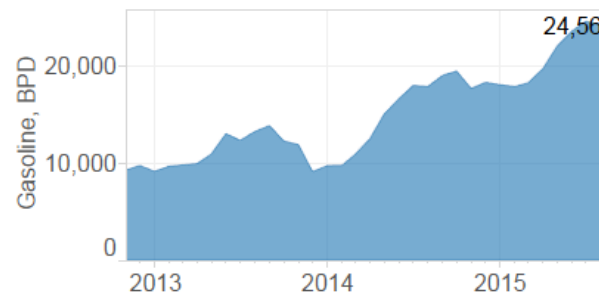
Propane



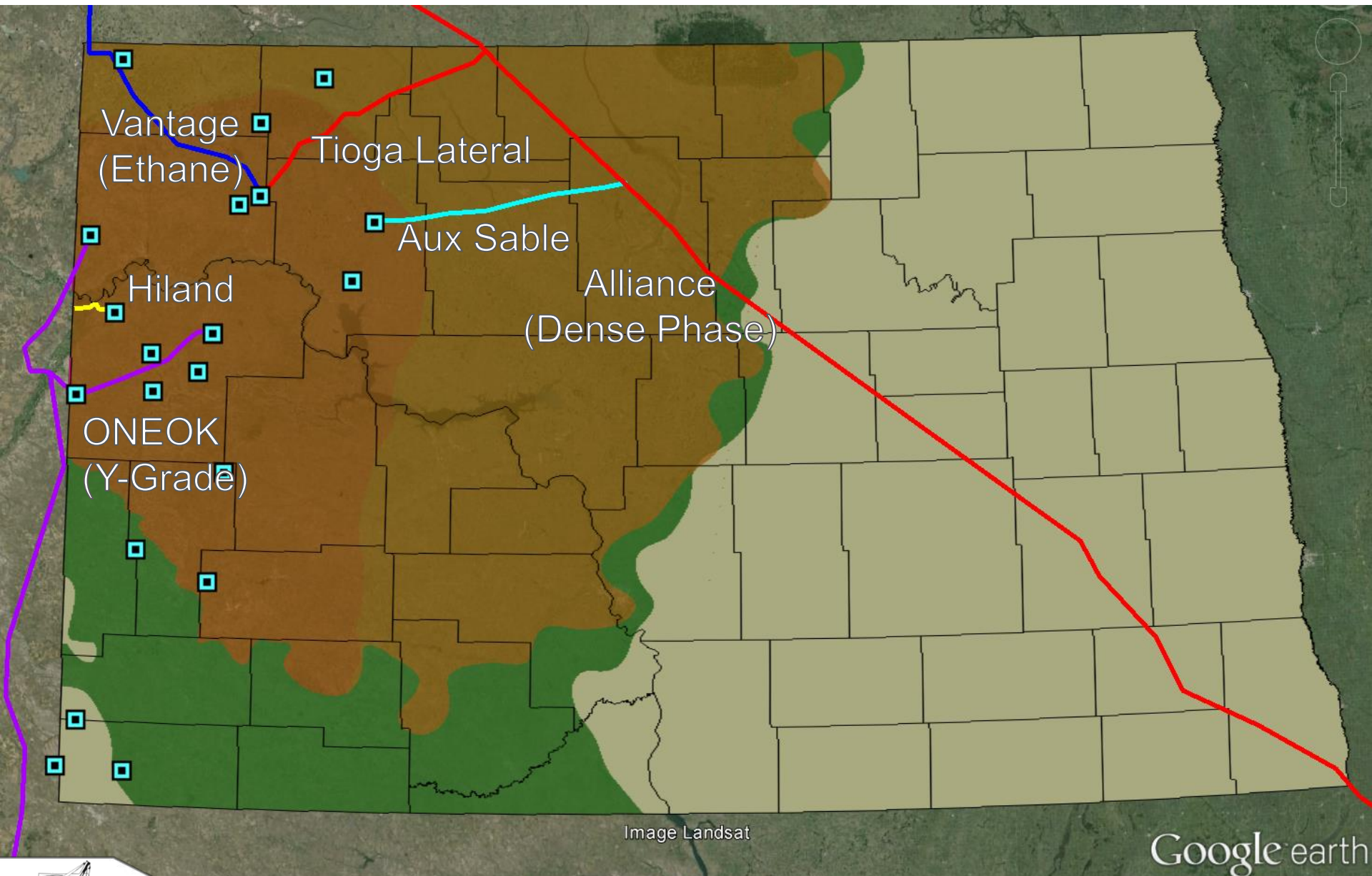
Butane



Natural Gasoline



NGL Pipeline Transportation



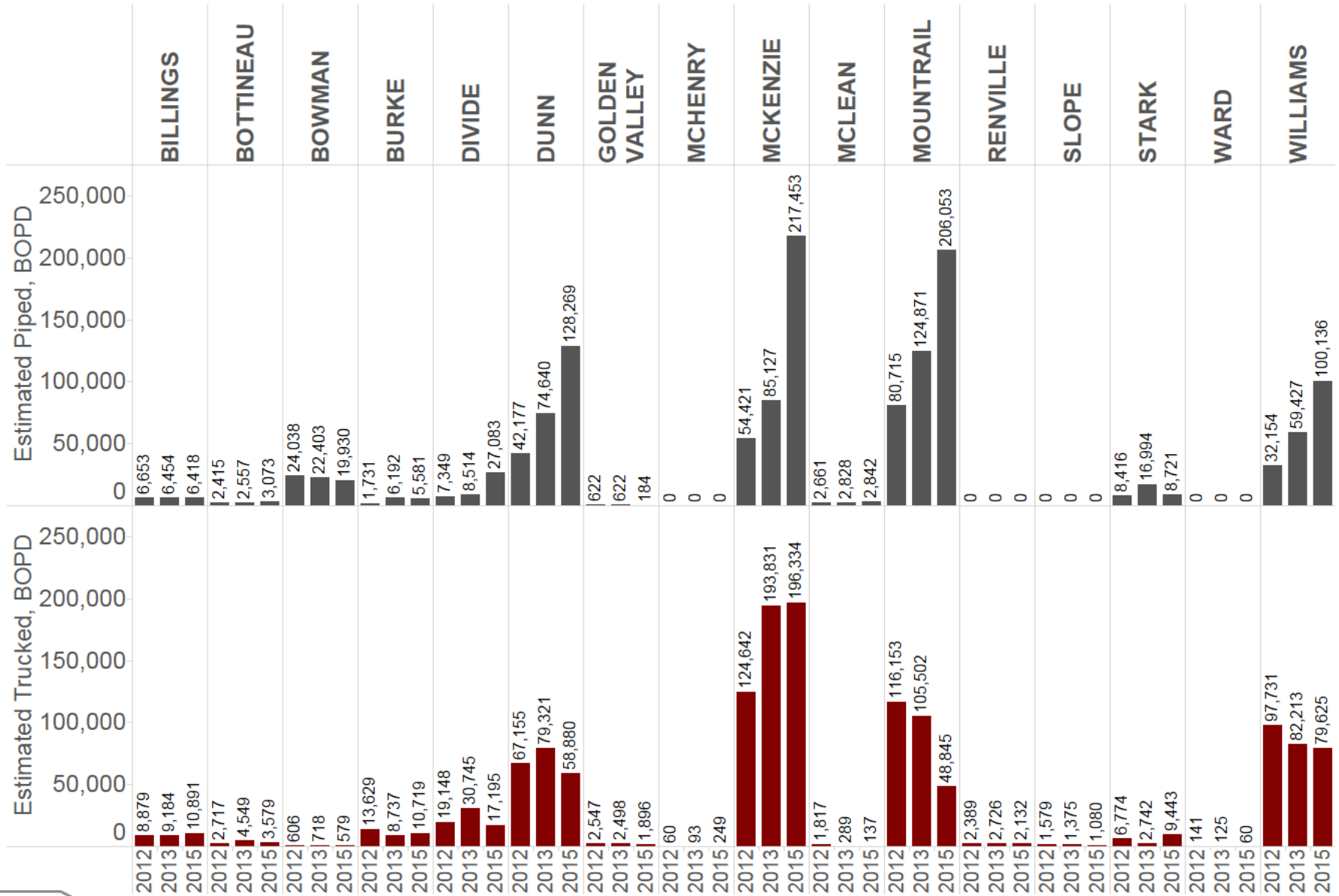
Recent Video Presentations

- Over 3,100 video downloads since Aug-15
- Major topics include:
 - Bakken economics
 - Production insight, trends, and expectations
 - Crude oil gathering

All videos available for replay online

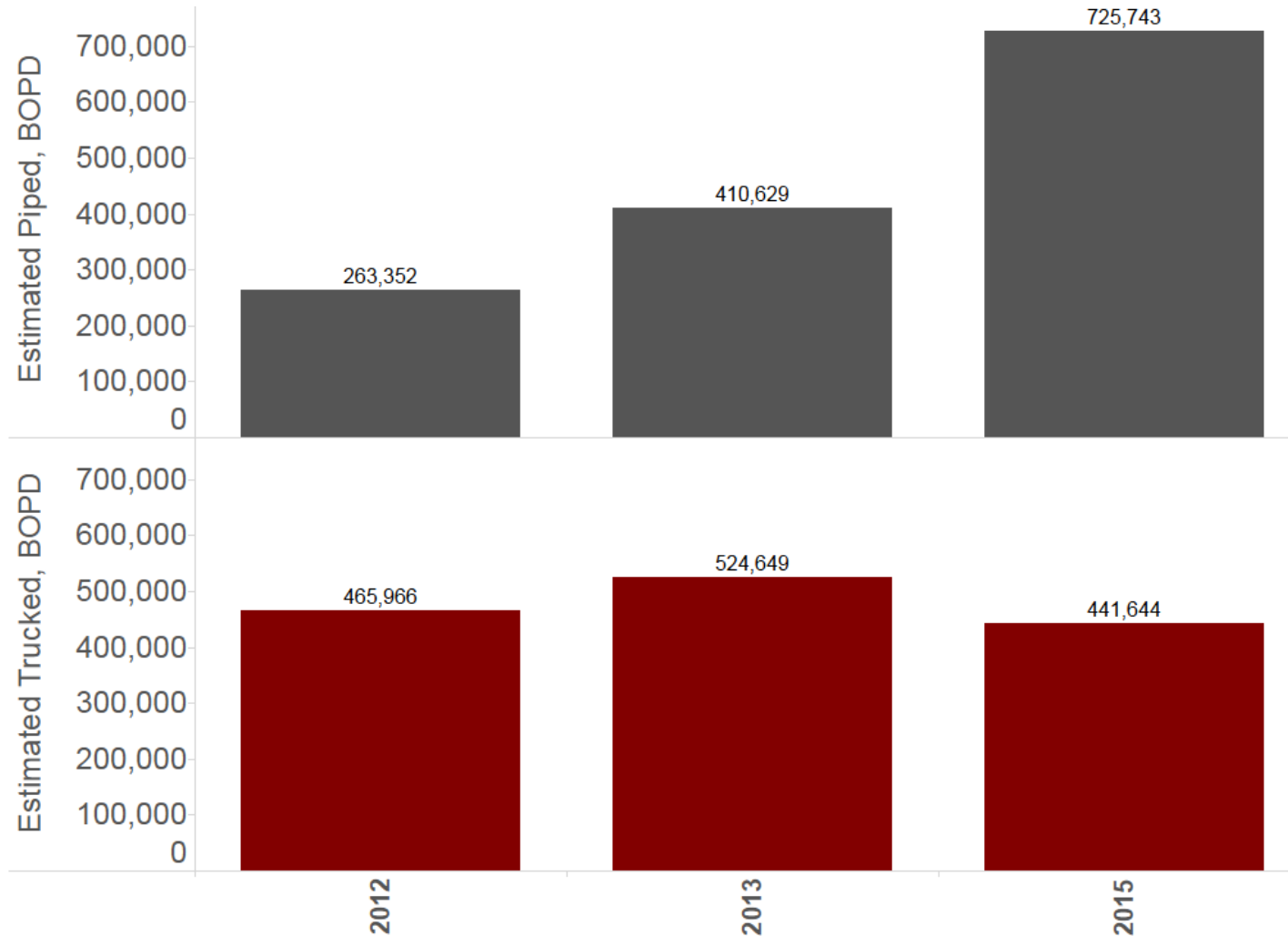


Evolution of Oil Gathering in ND

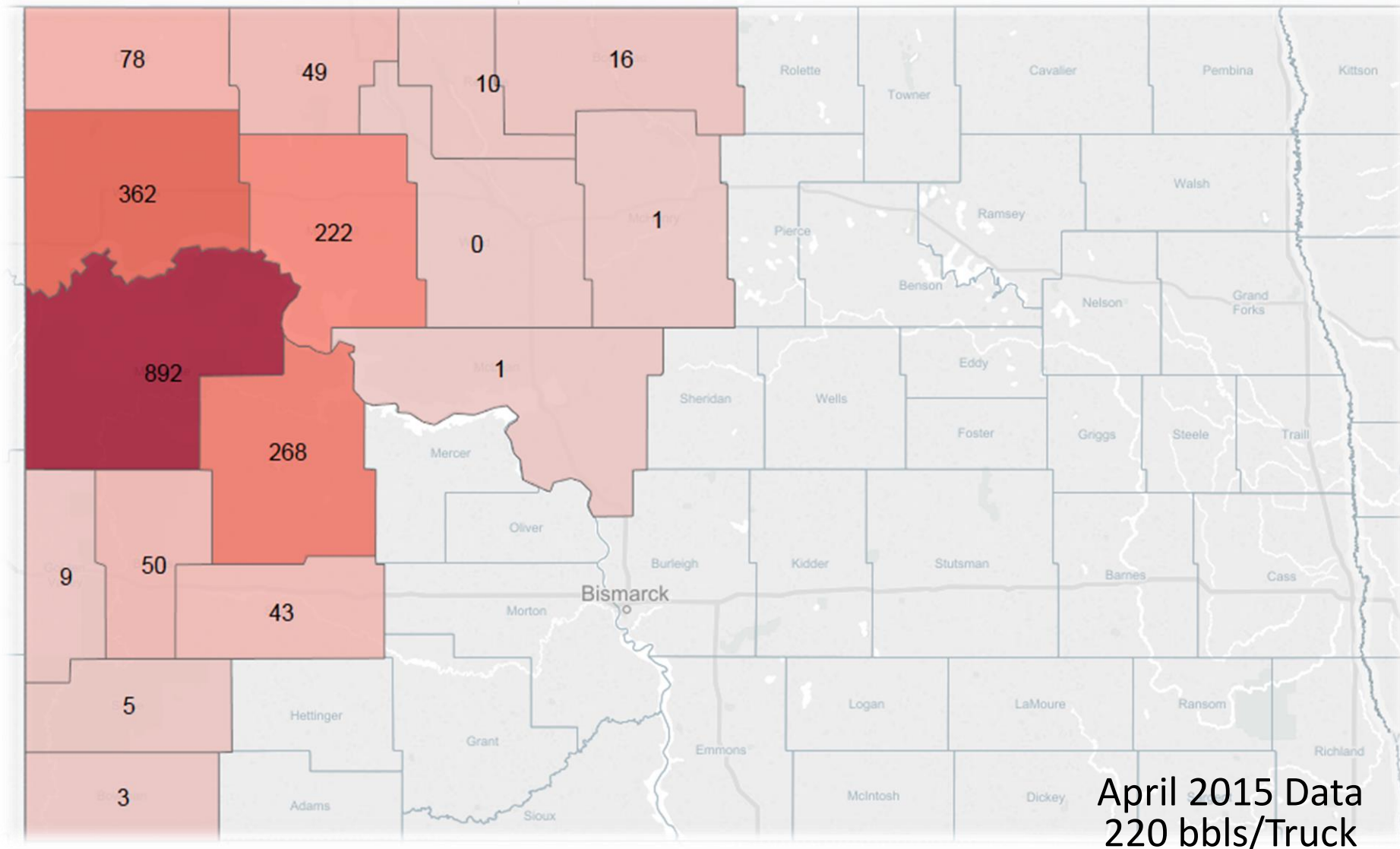


Evolution of Oil Gathering in ND

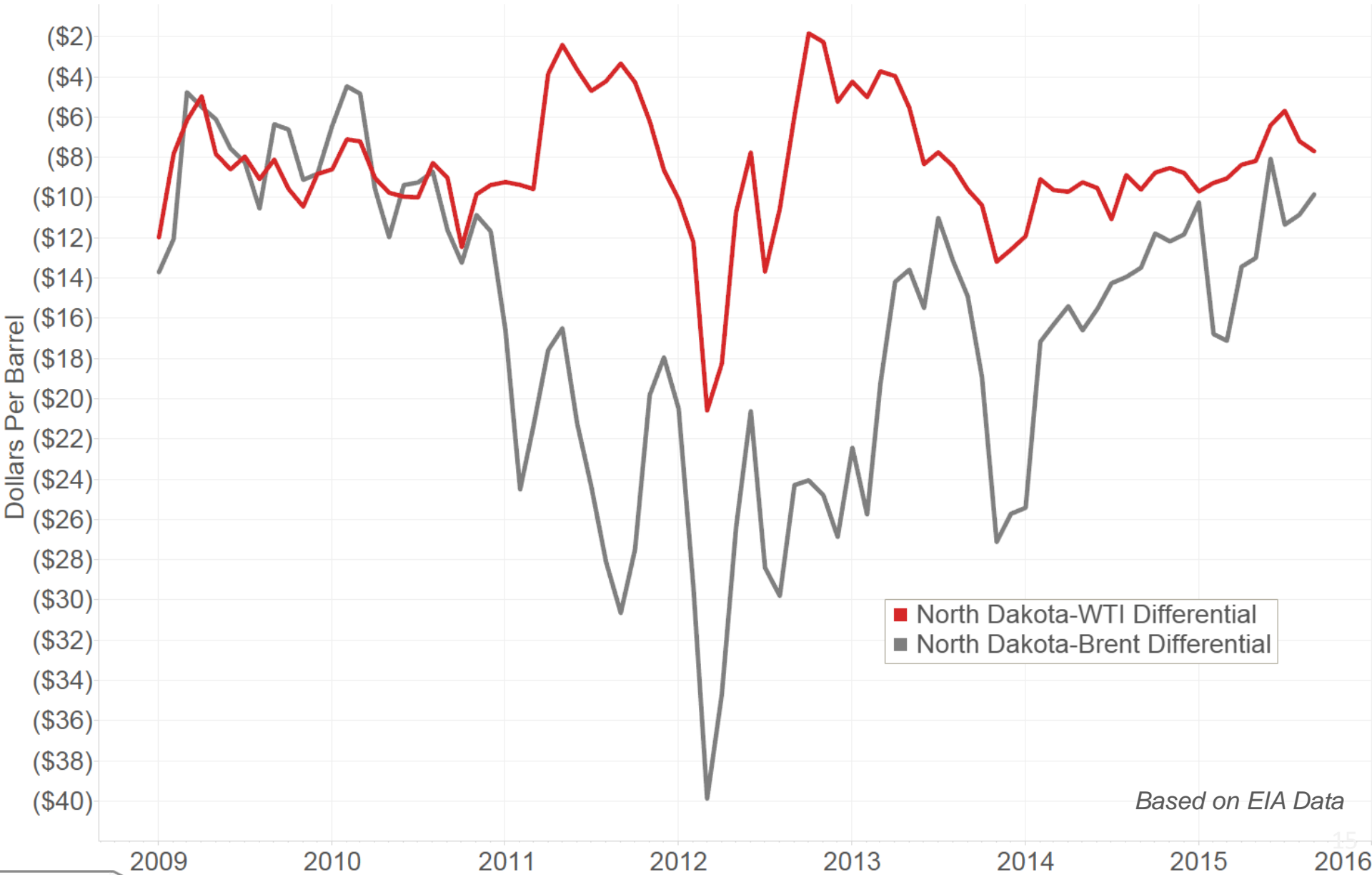
Statewide Totals



Estimated Loaded Oil Truckloads Per Day



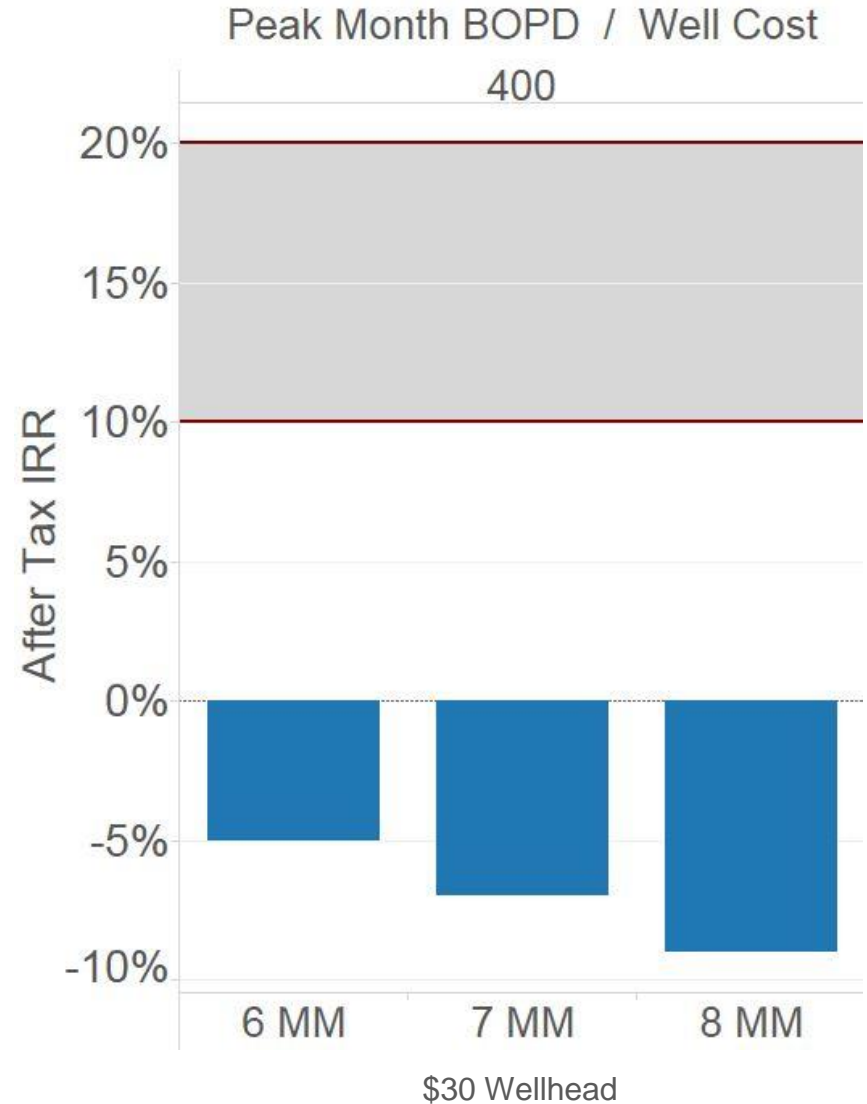
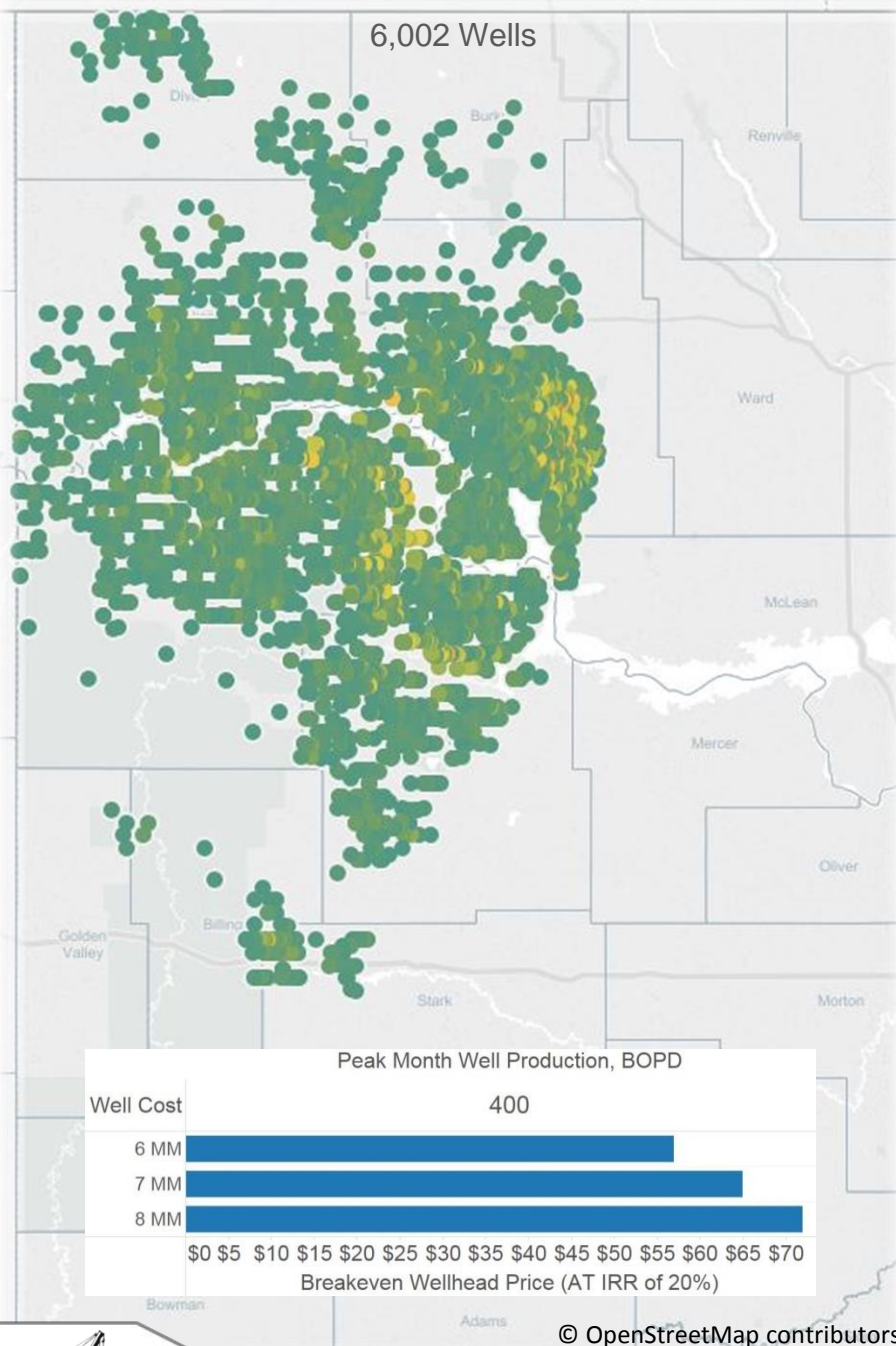
North Dakota Oil Differential



Based on EIA Data

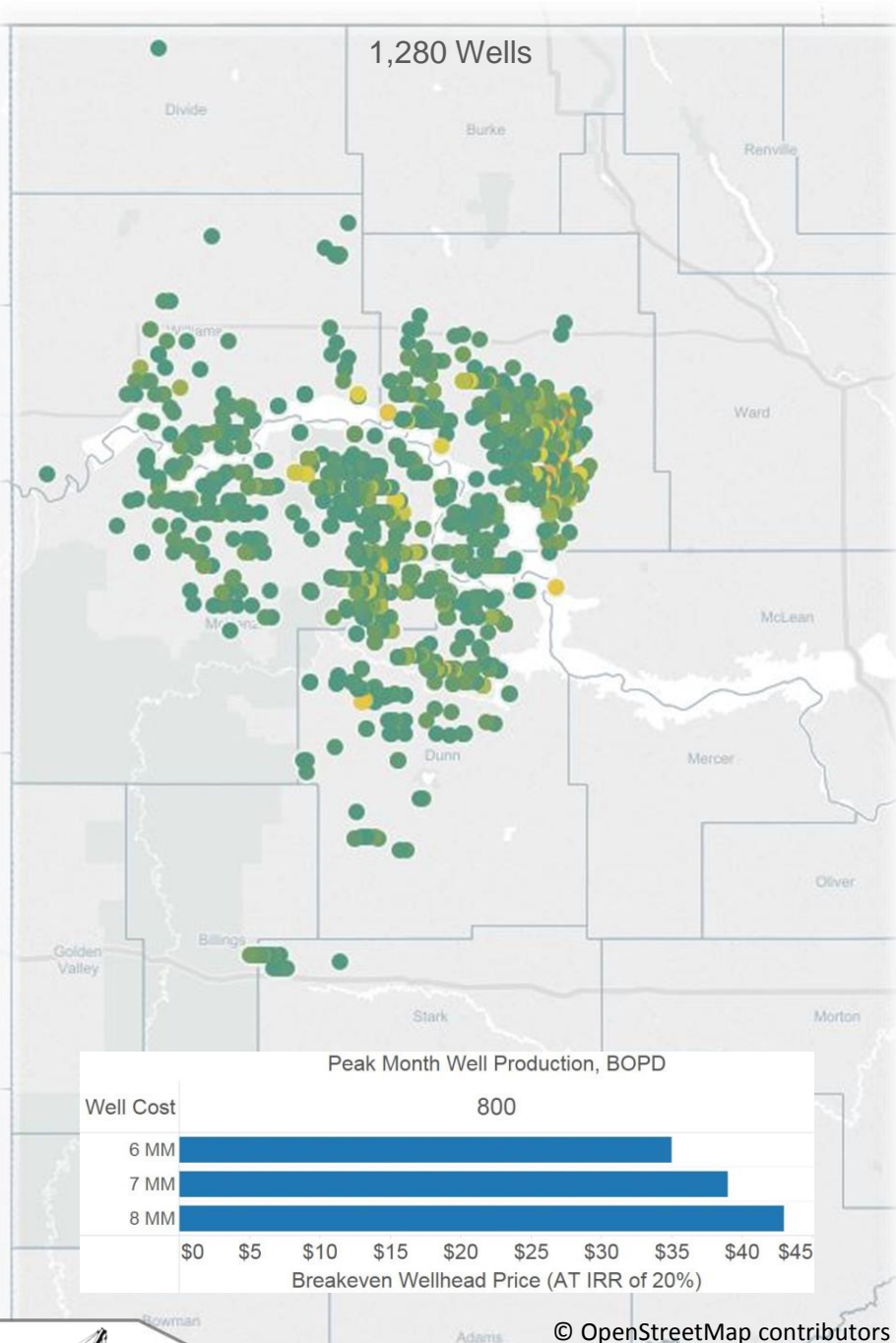
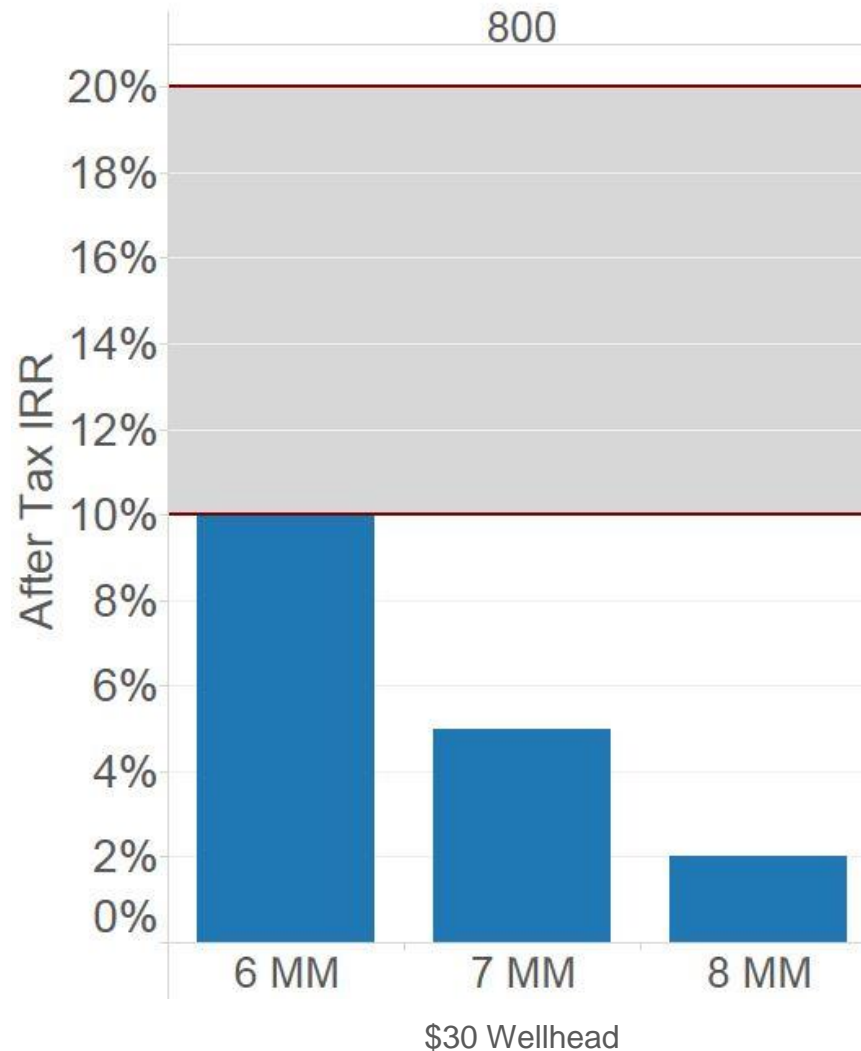


Peak Month Minimum 400 BOPD

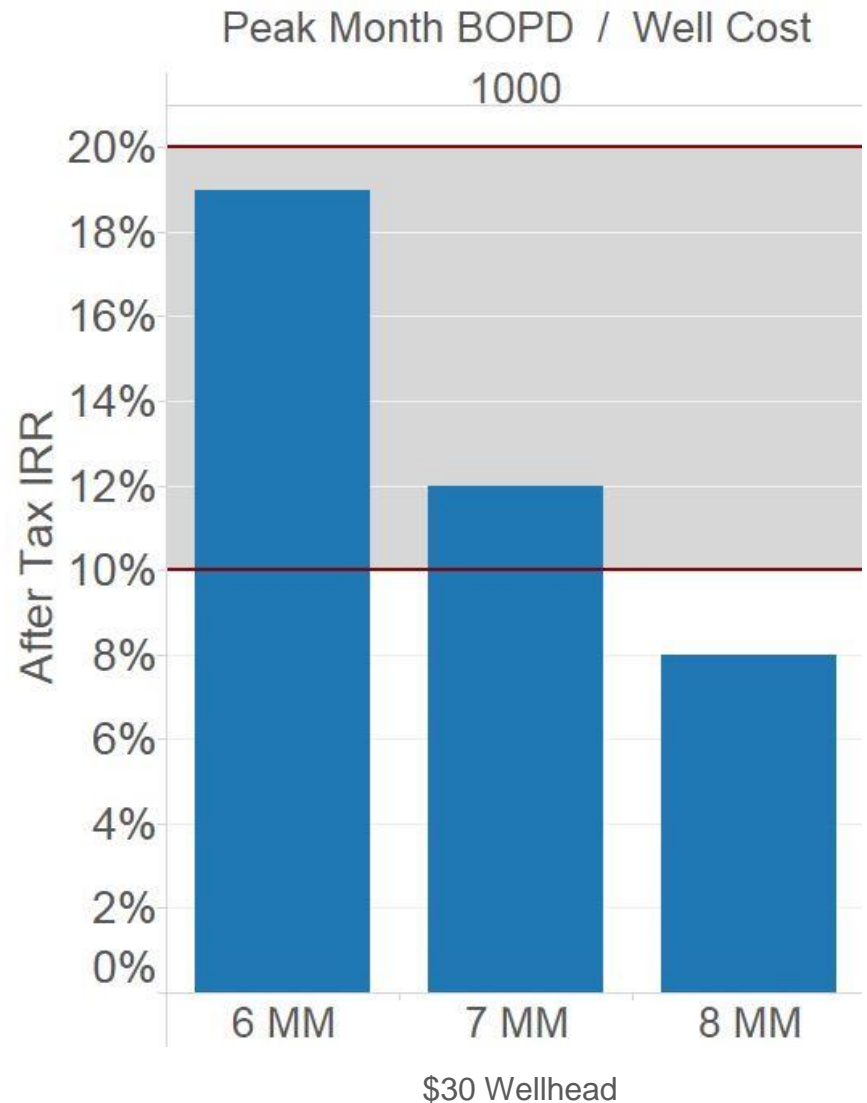
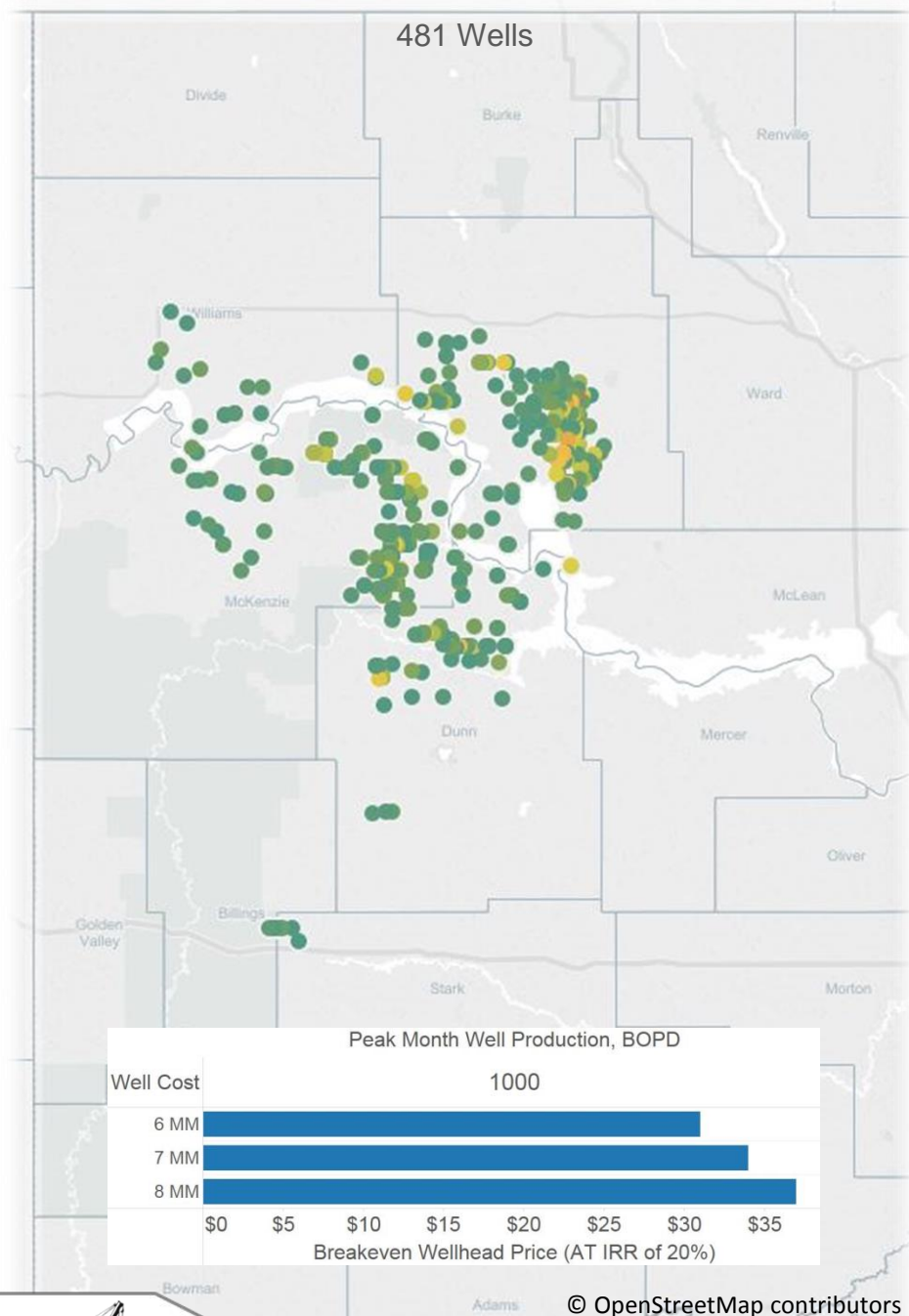


Peak Month Minimum 800 BOPD

Peak Month BOPD / Well Cost
800



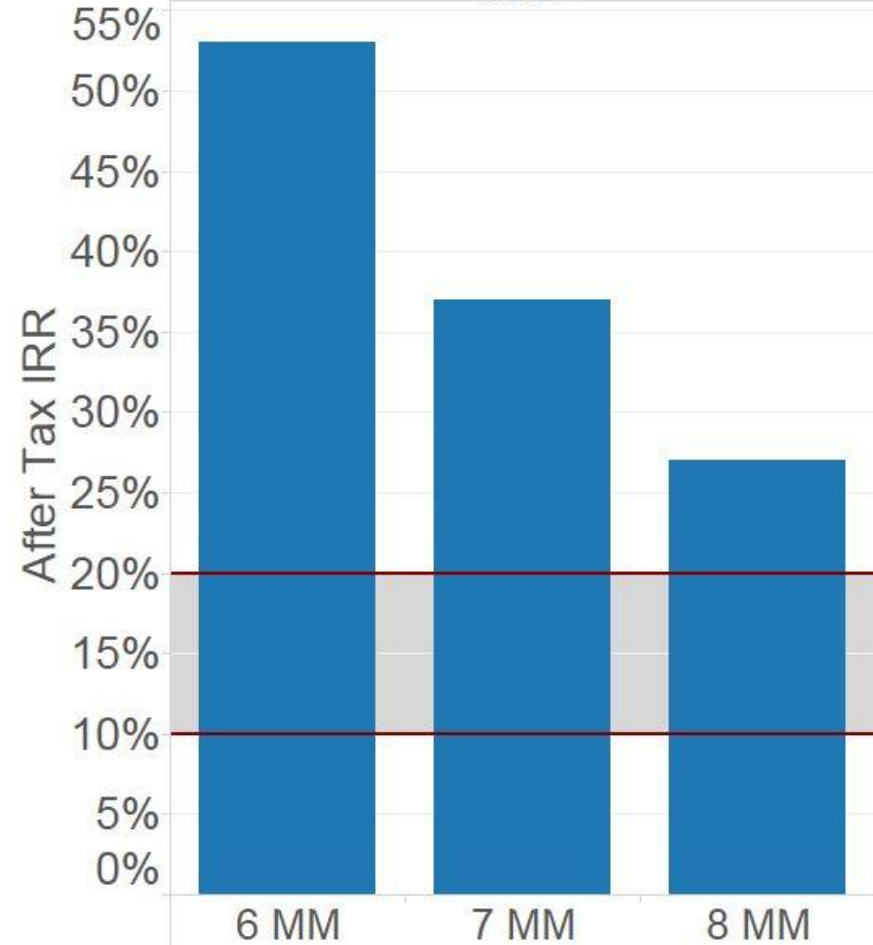
Peak Month Minimum 1,000 BOPD



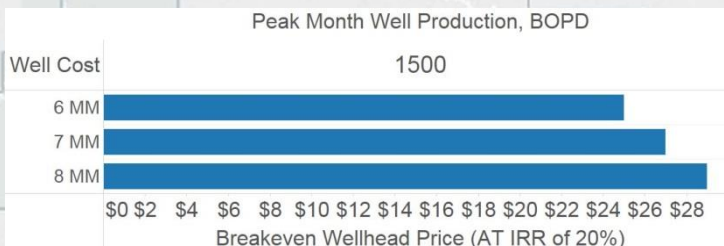
Peak Month Minimum 1,500 BOPD

Peak Month BOPD / Well Cost

1500



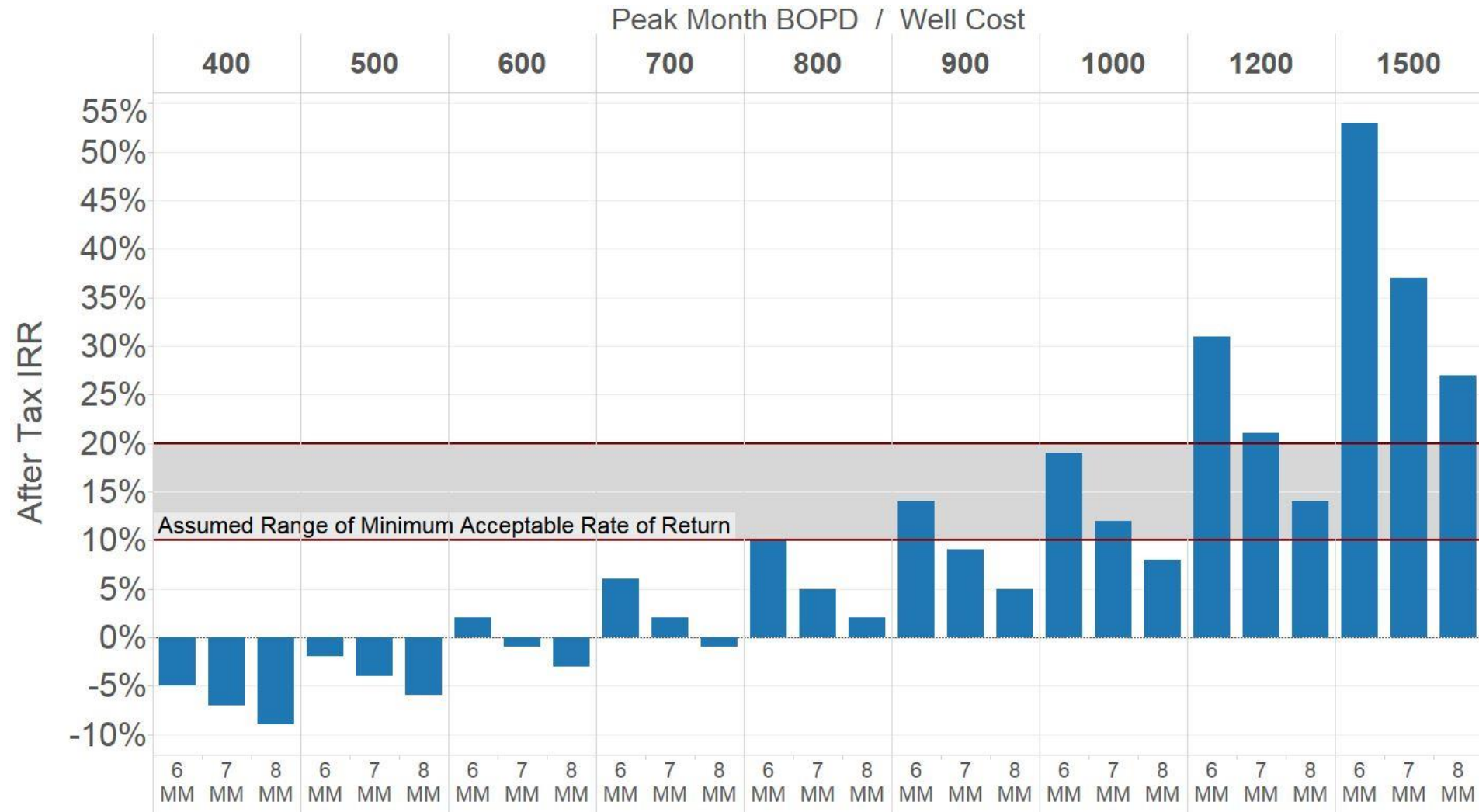
\$30 Wellhead



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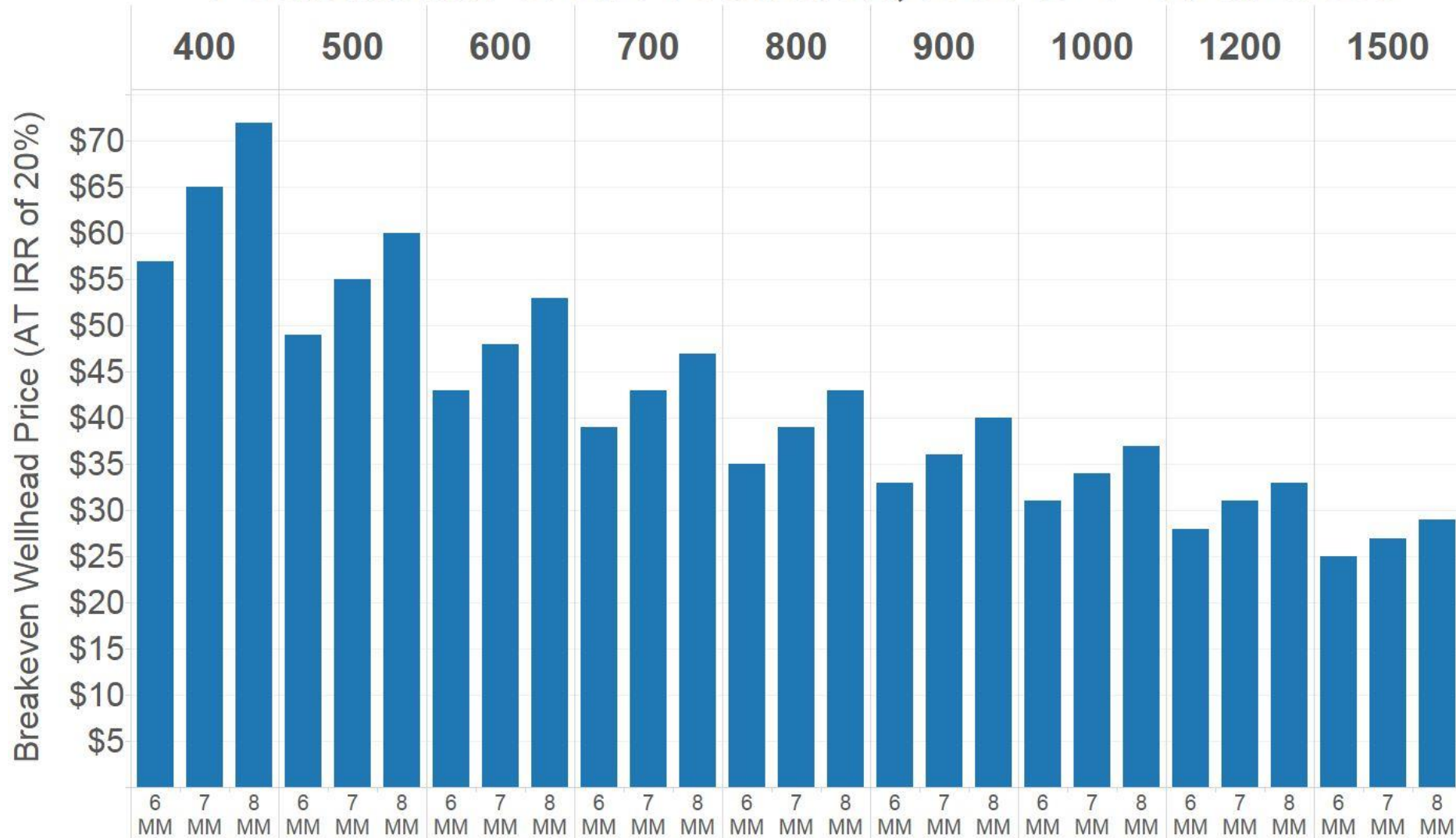


Summary of \$30 Wellhead Oil



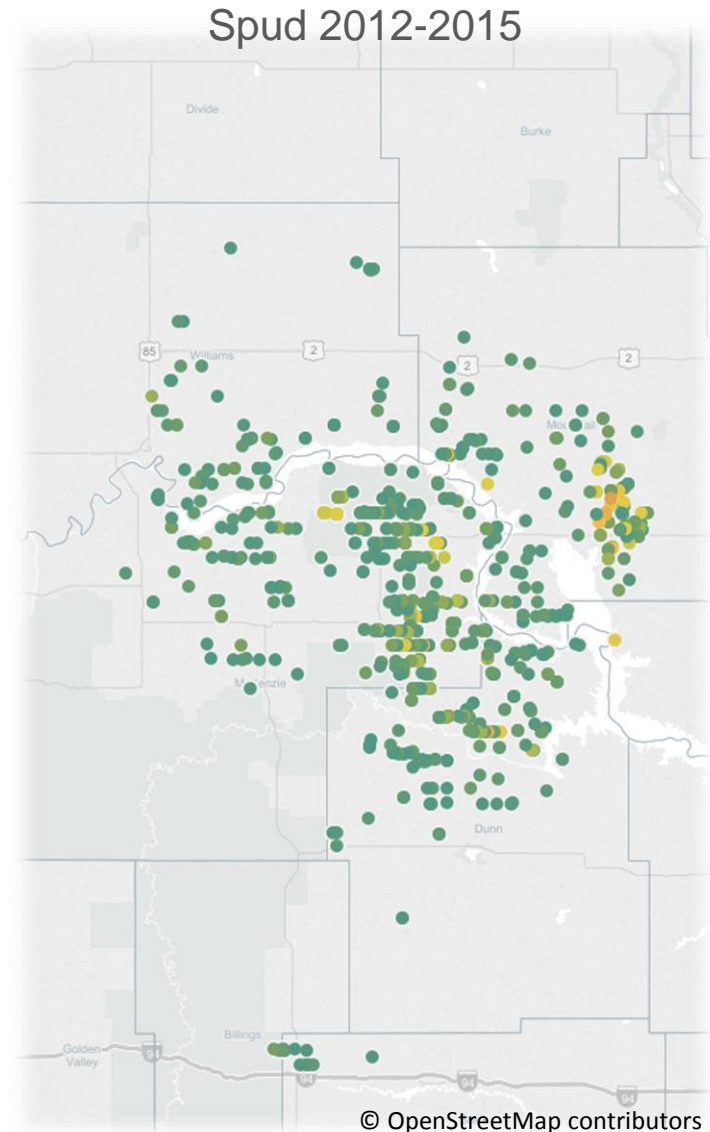
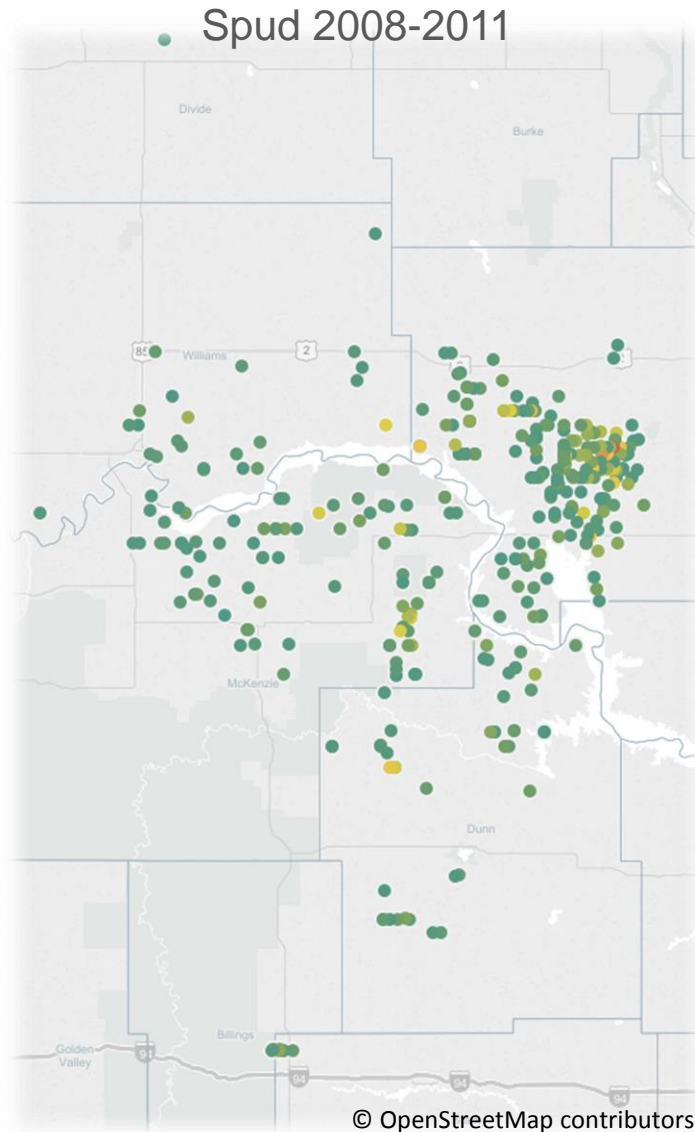
Breakeven Summary

Peak Month Well Production, BOPD / Well Cost



Understanding “The Core” Footprint

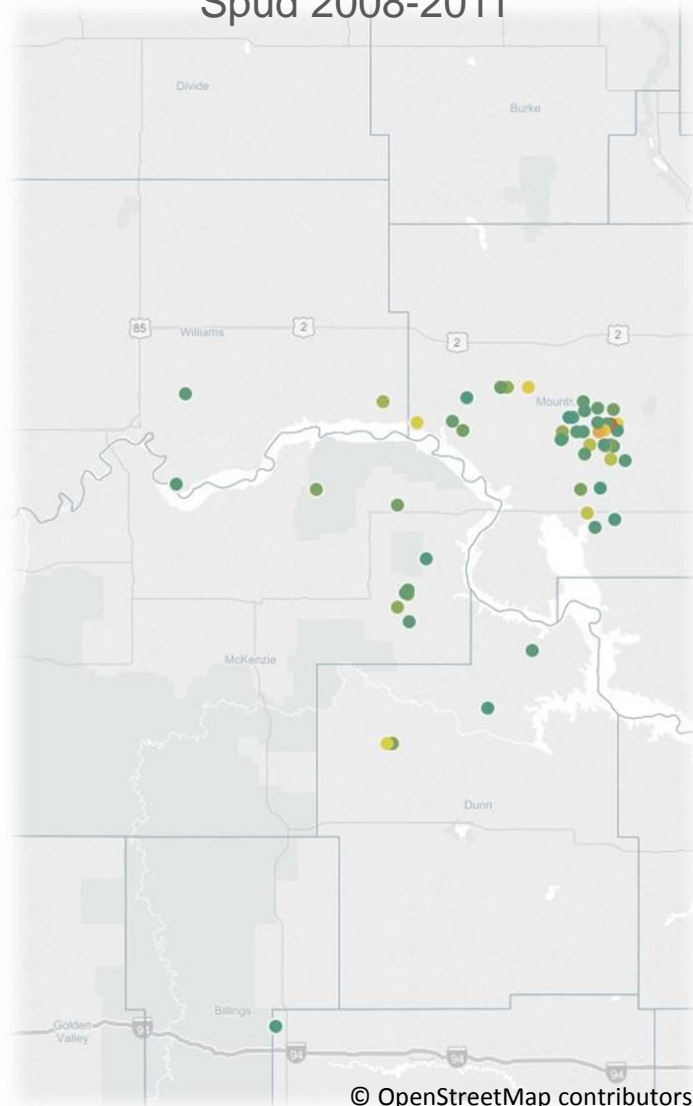
Peak Month Minimum: 800 BOPD



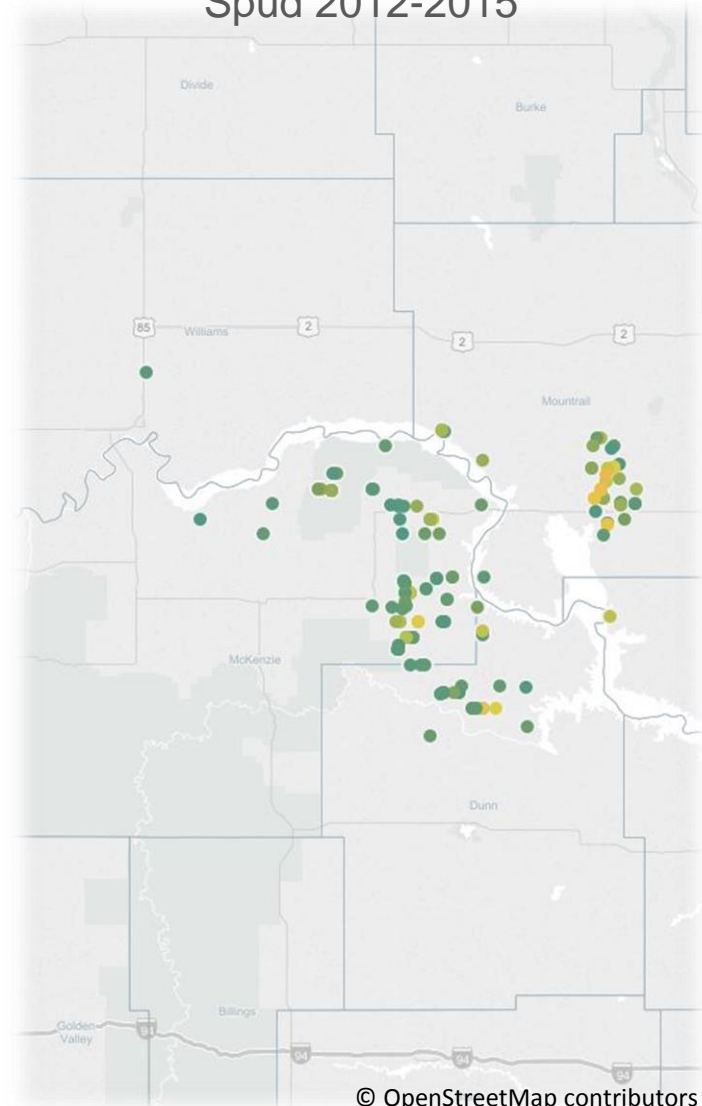
Understanding “The Core” Footprint

Peak Month Minimum: 1,200 BOPD

Spud 2008-2011



Spud 2012-2015



Contact Information

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