



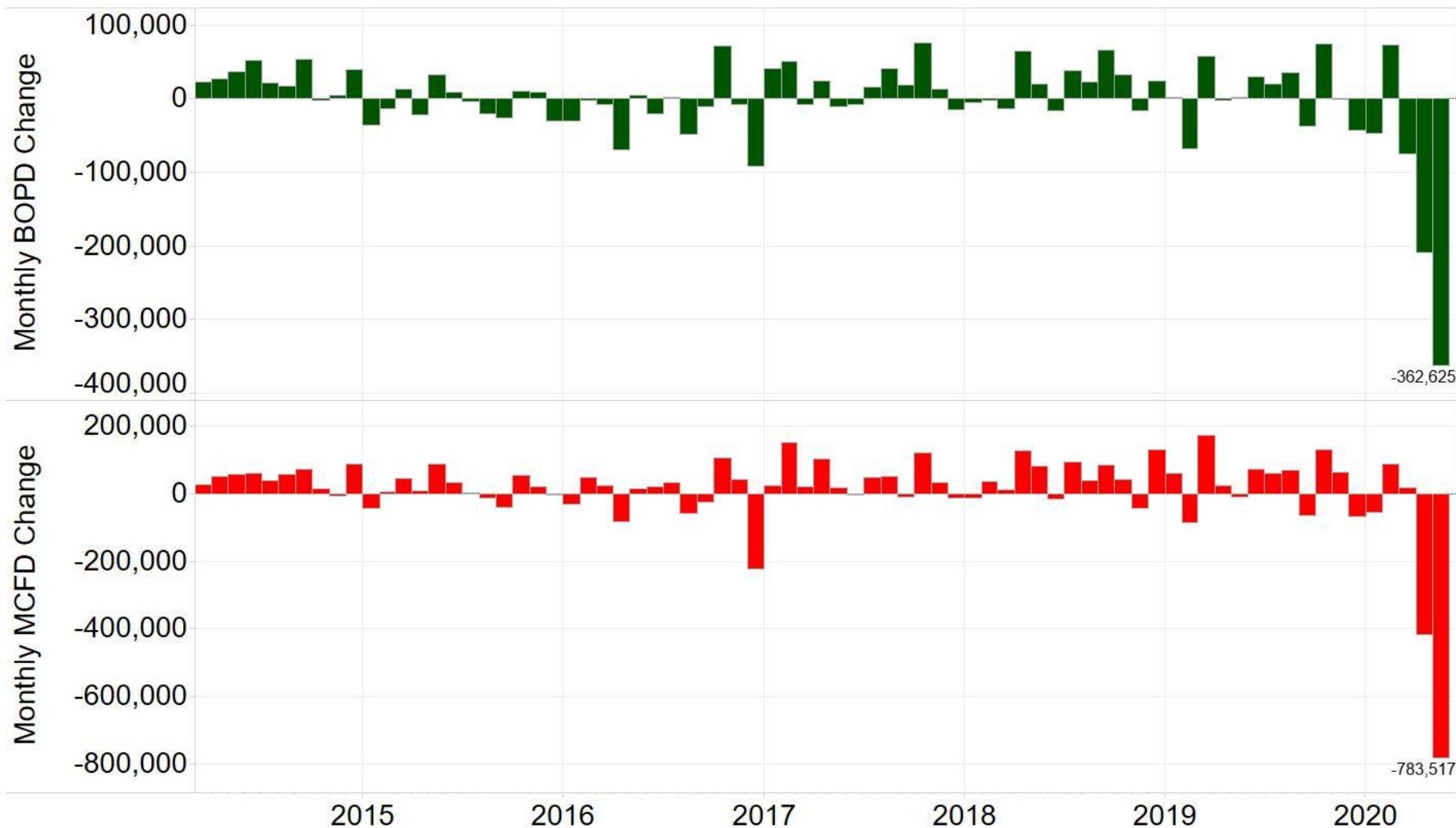
**July 2020 Monthly Update
North Dakota Pipeline Authority
Justin J. Kringstad
July 17, 2020**

US Williston Basin Oil Production - 2020

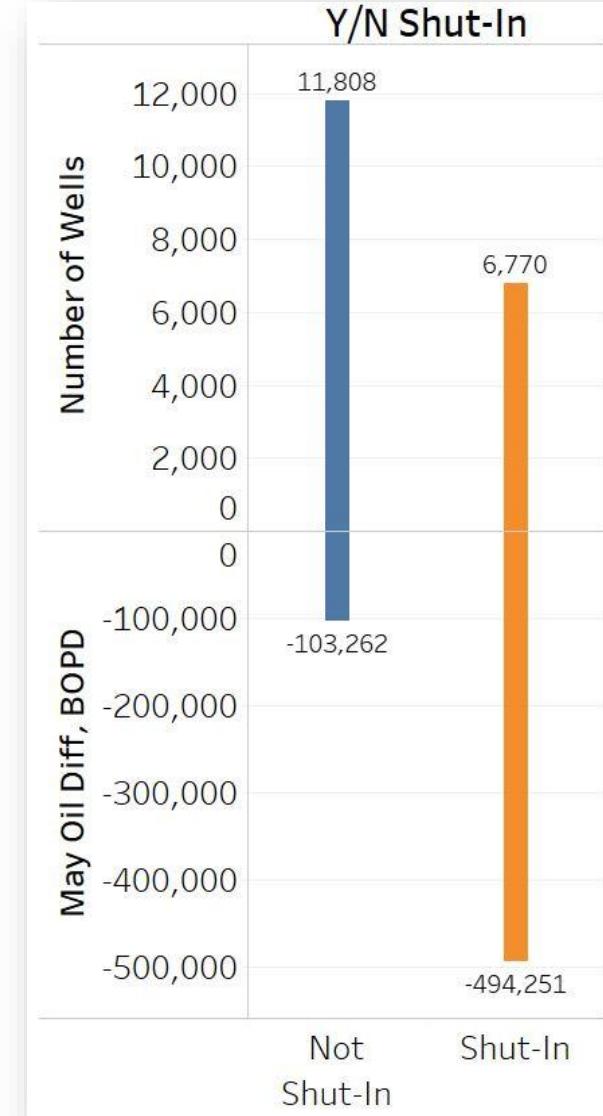
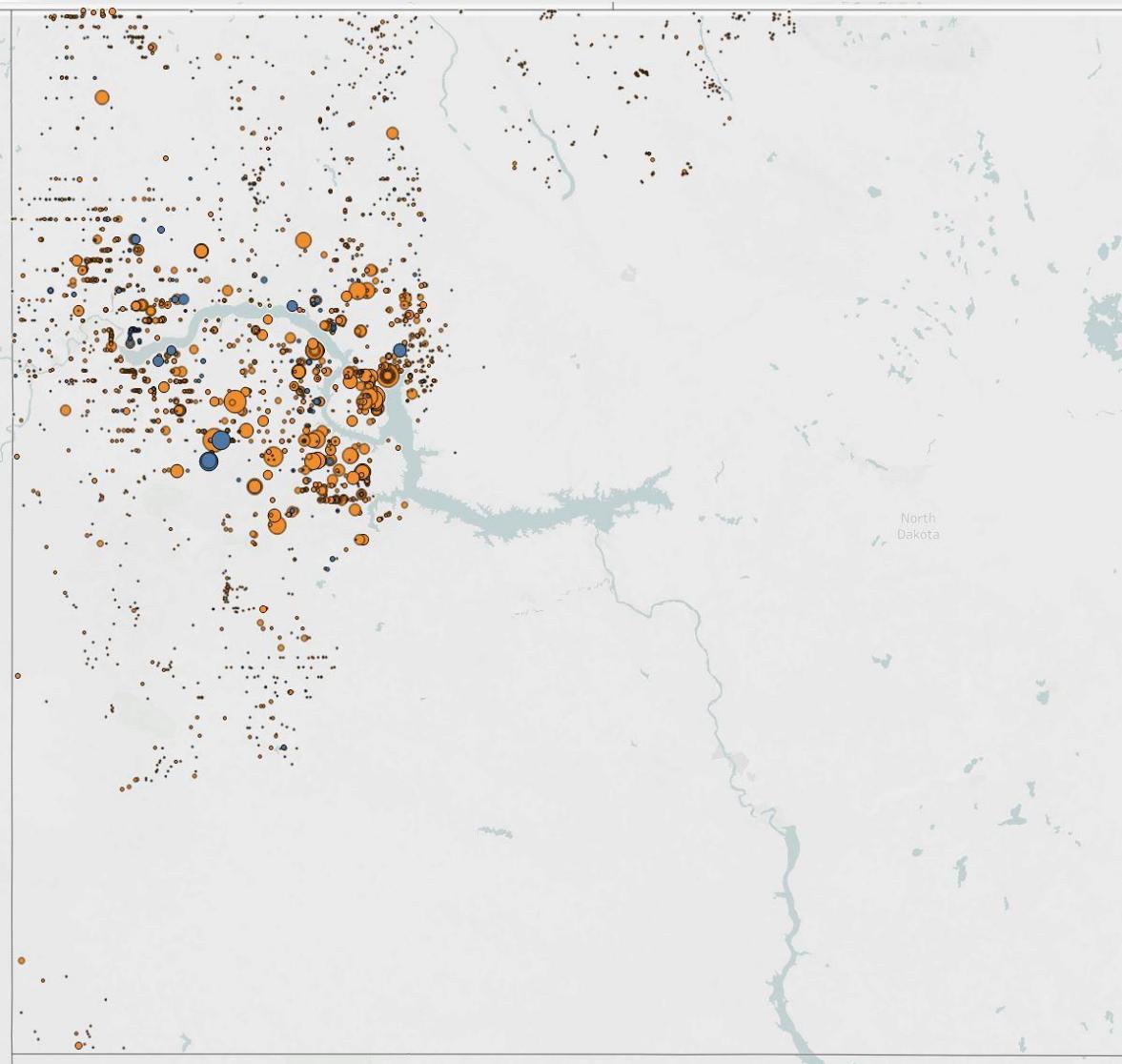
MONTH	ND	Eastern MT*	SD	TOTAL
January	1,430,521	57,385	3,091	1,490,996
February	1,503,591	55,297	3,070	1,561,958
March	1,429,501	57,551	2,946	1,489,998
April	1,221,019	48,029	2,610	1,271,658
May	858,395			
June				
July				
August				
September				
October				
November				
December				



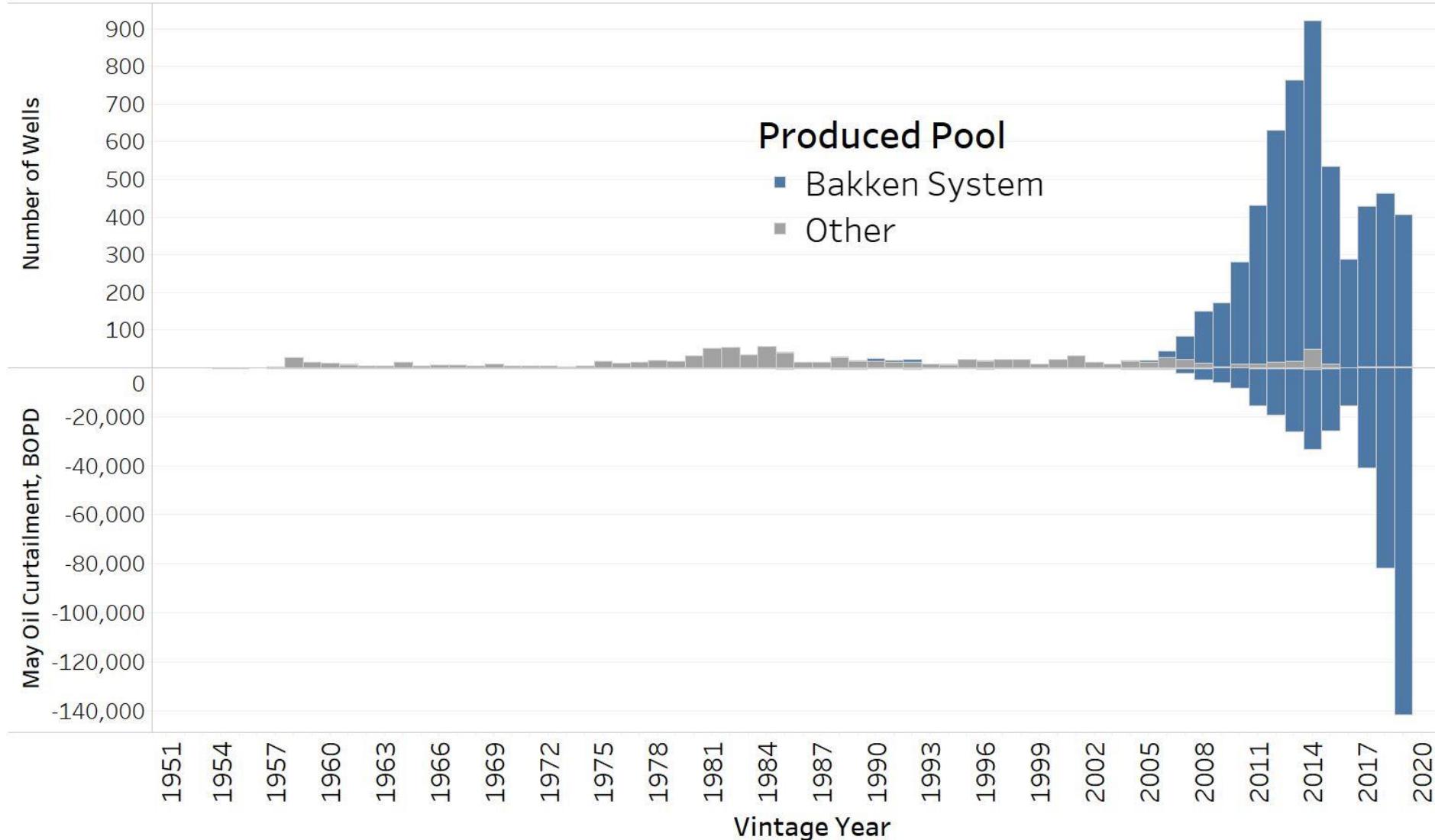
Monthly Production Change



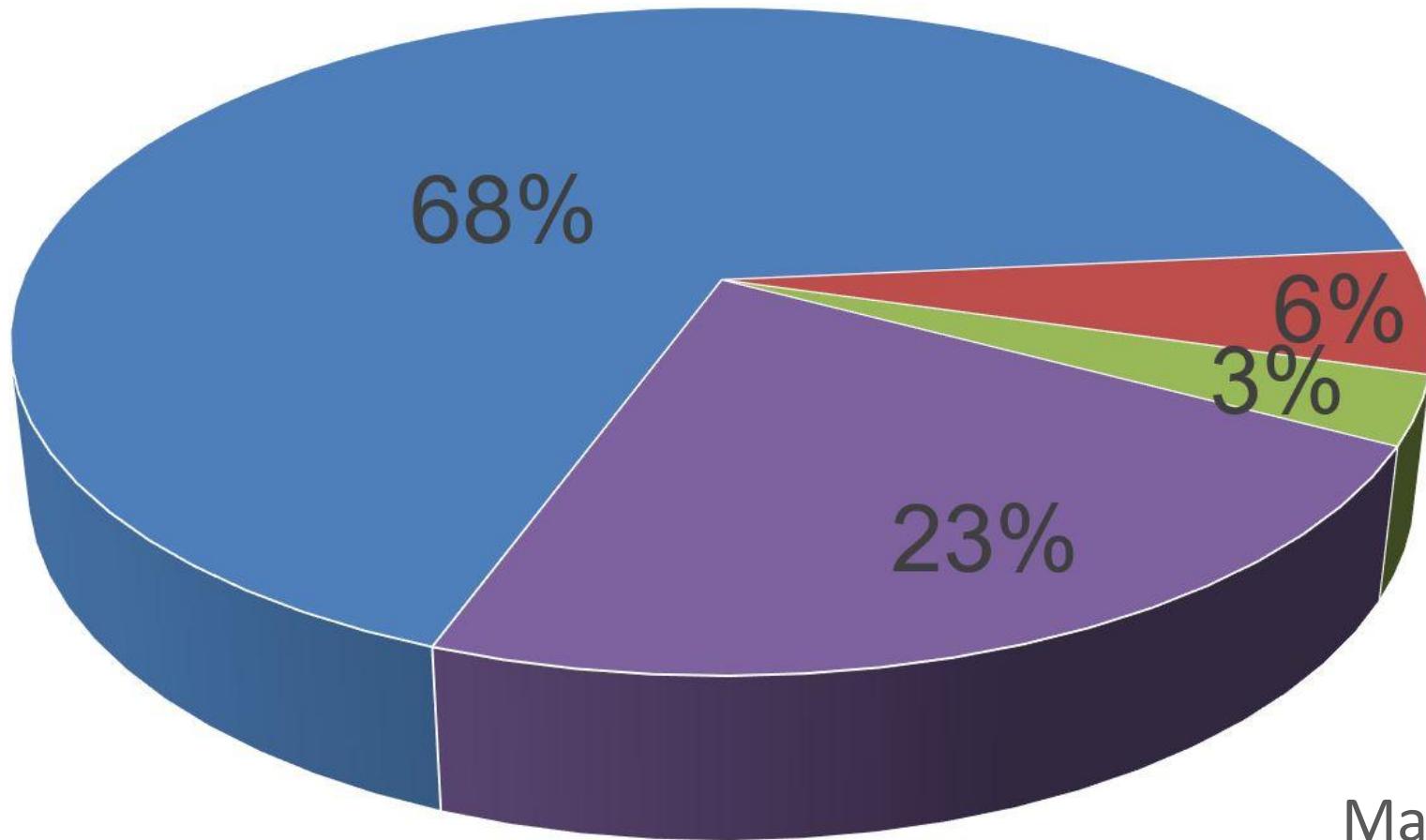
March to May 75+% M-O-M Oil Drop



Vintage Year of Shut-In Wells – May 2020



Estimated Williston Basin Oil Transportation



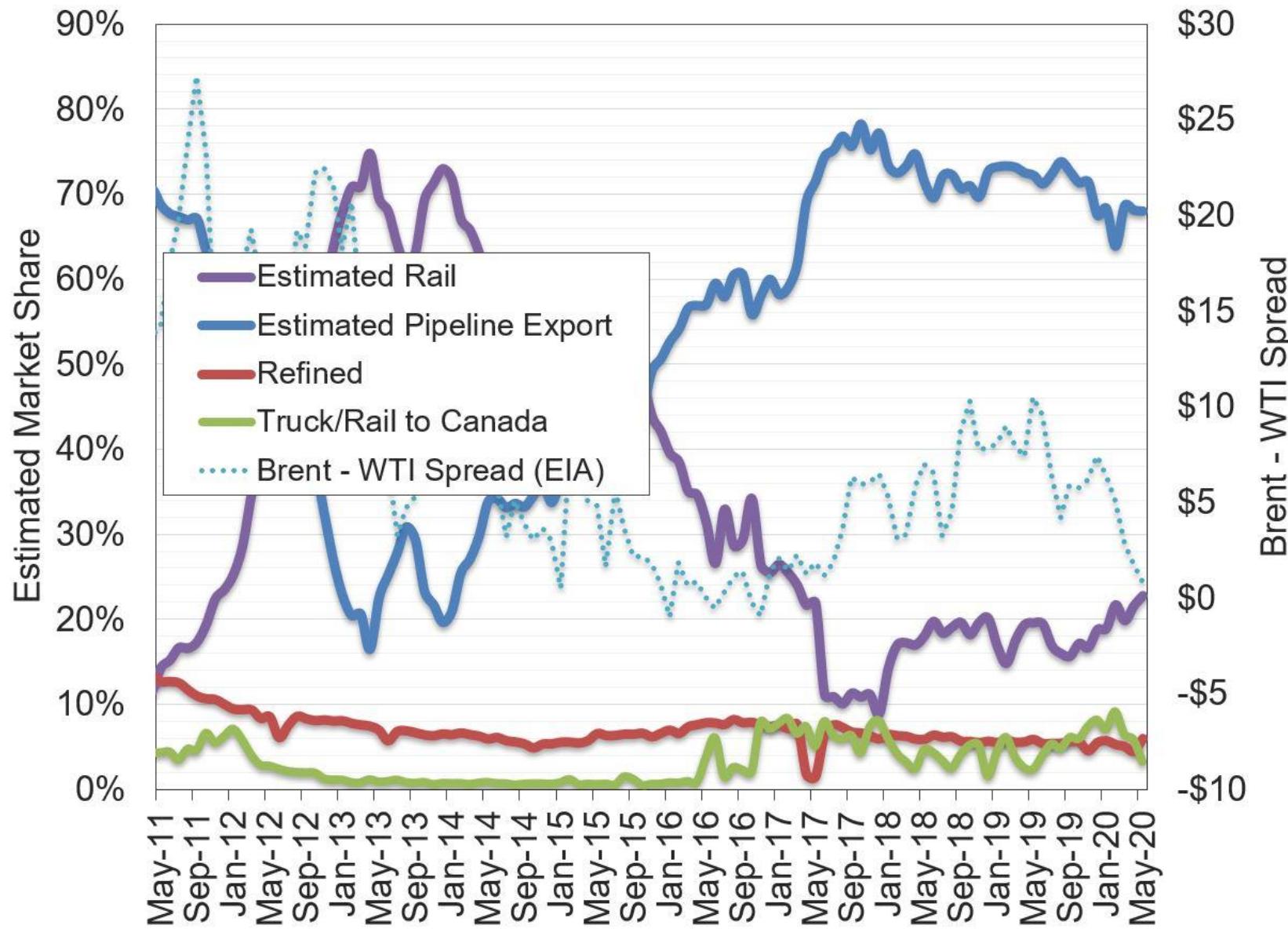
May 2020

- Pipeline Export
- Truck/Rail to Canada

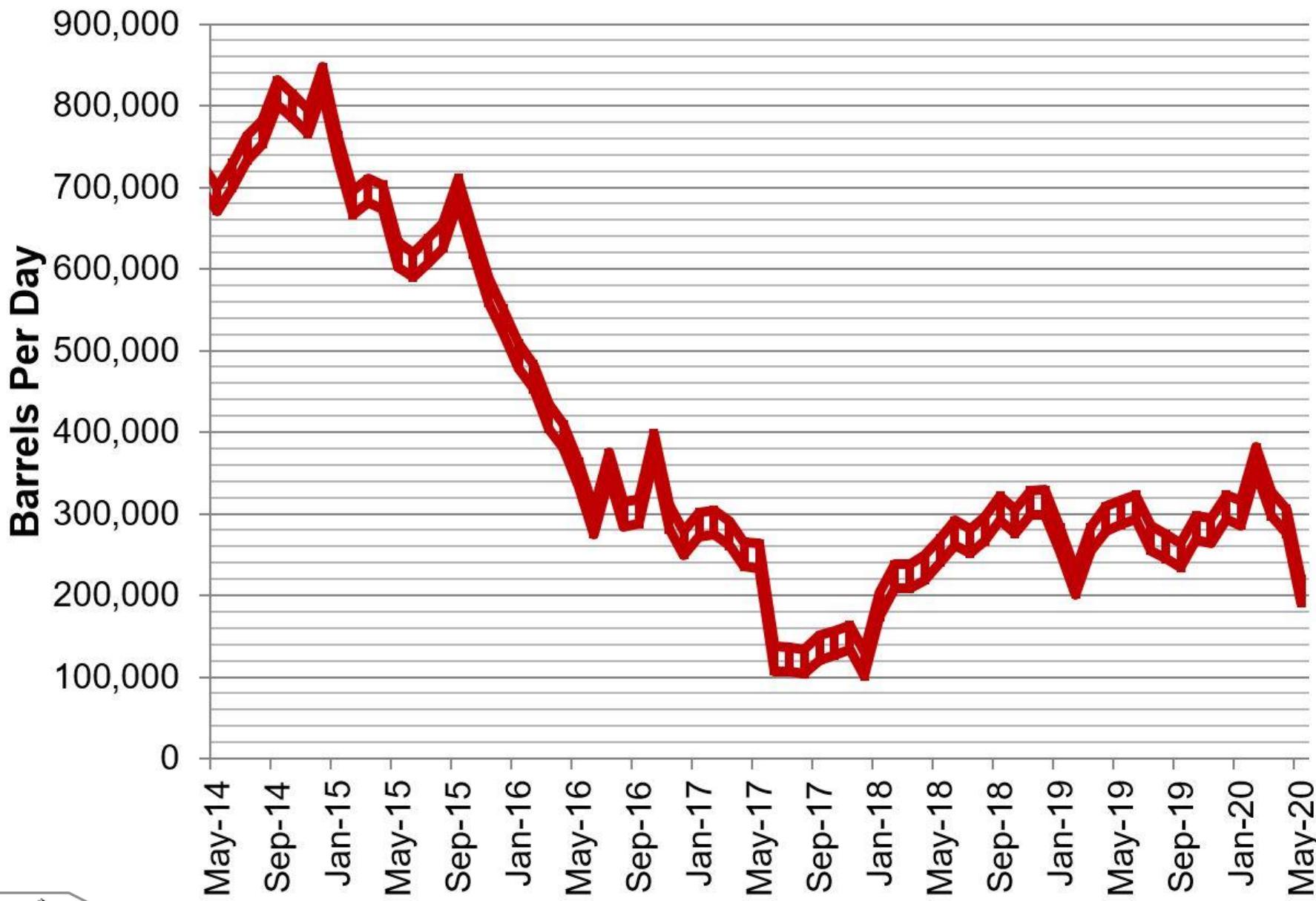
- Refined
- Estimated Rail



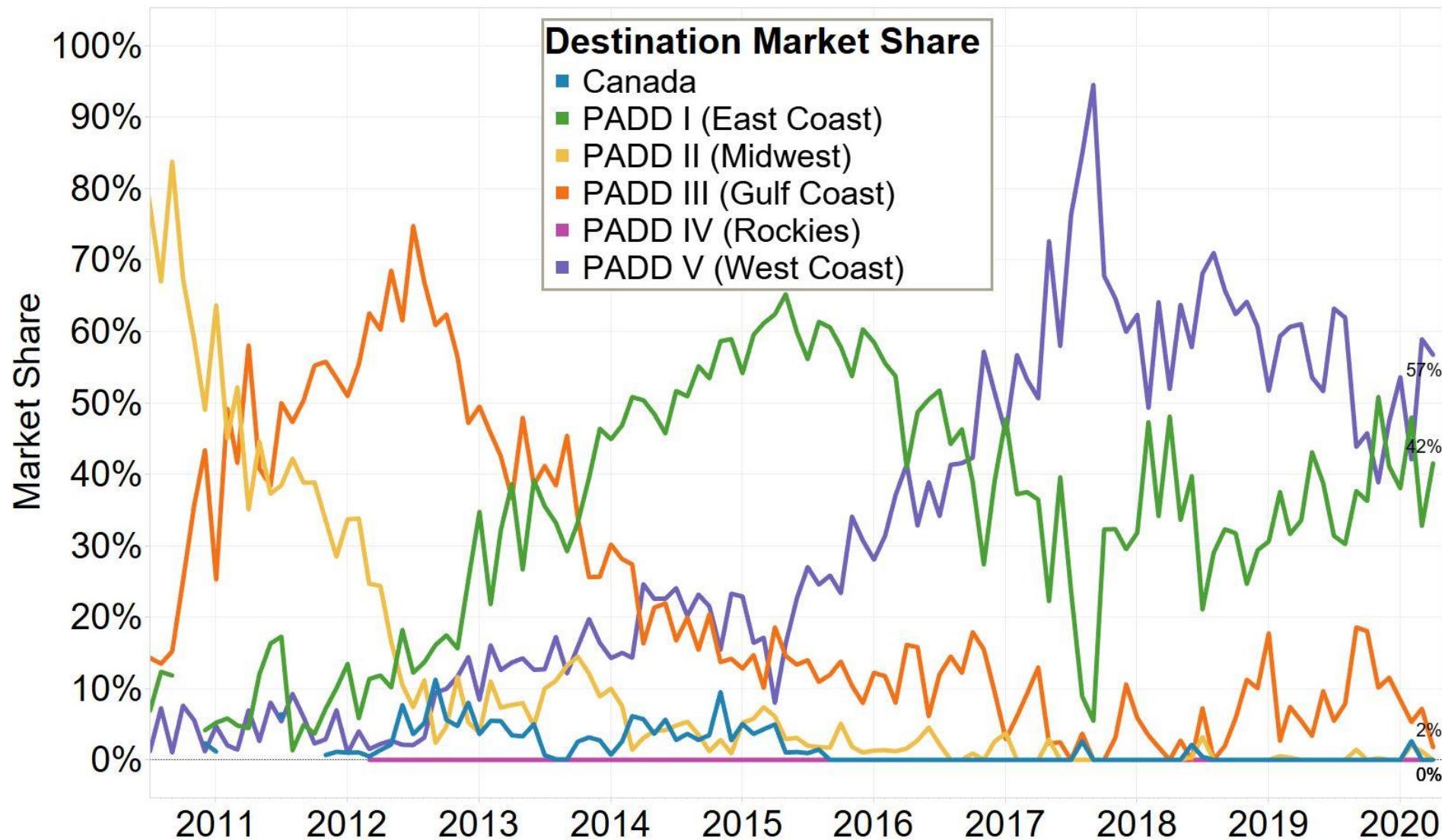
Estimated Williston Basin Oil Transportation



Estimated ND Rail Export Volumes



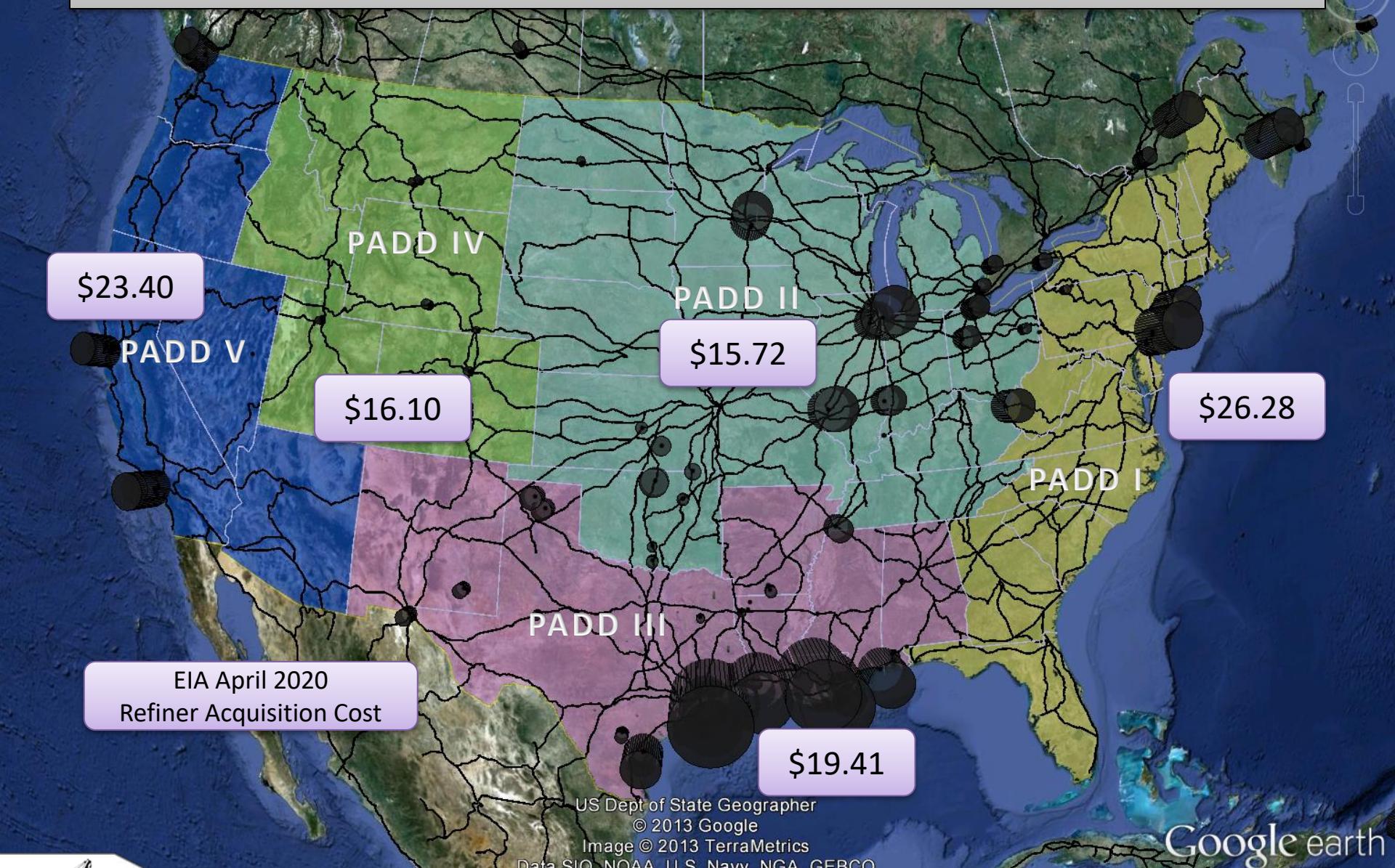
Rail Destinations Market Share (Apr. 2020)



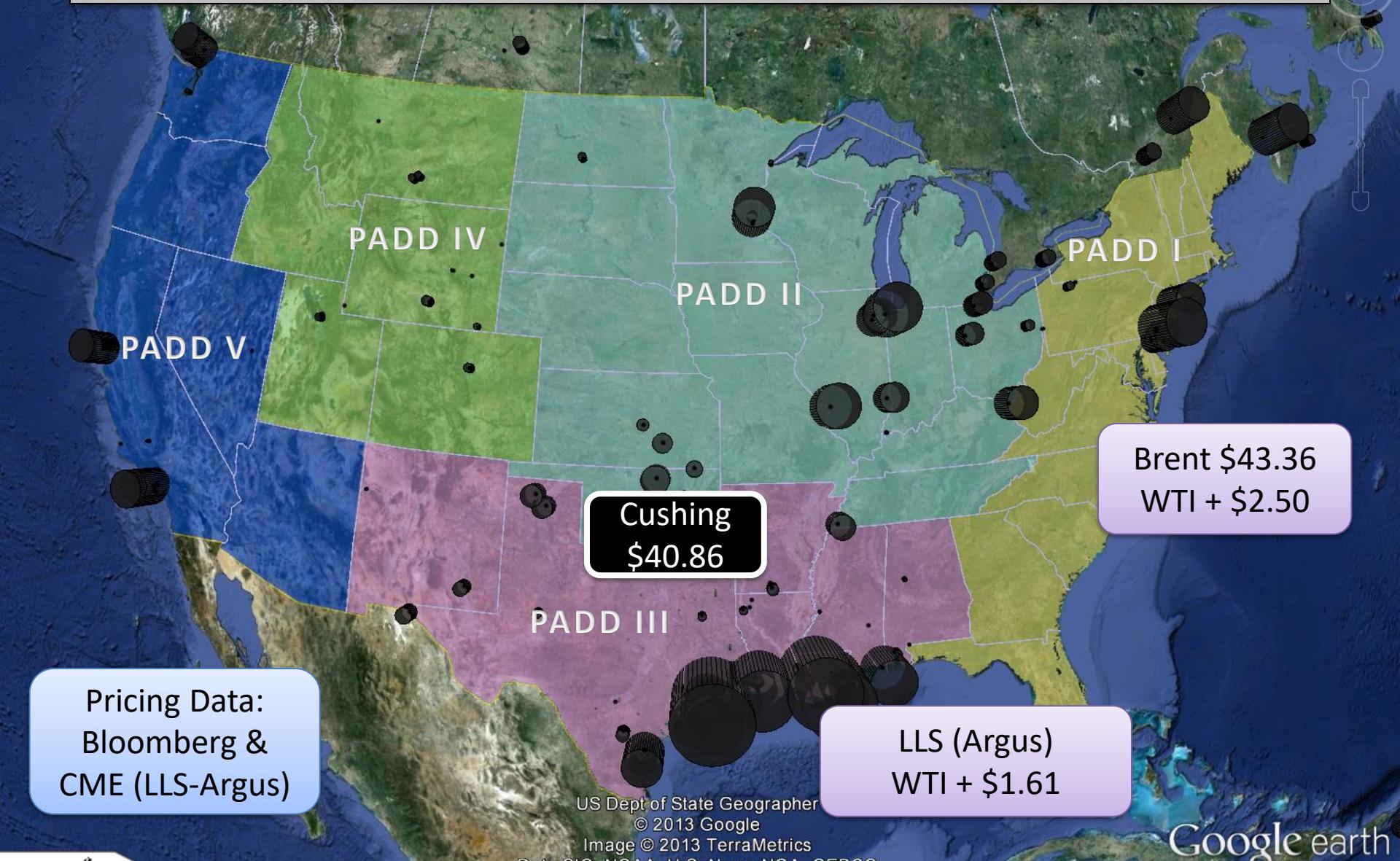
Data for Rail Destination Market Share Provided by the US Energy Information Administration



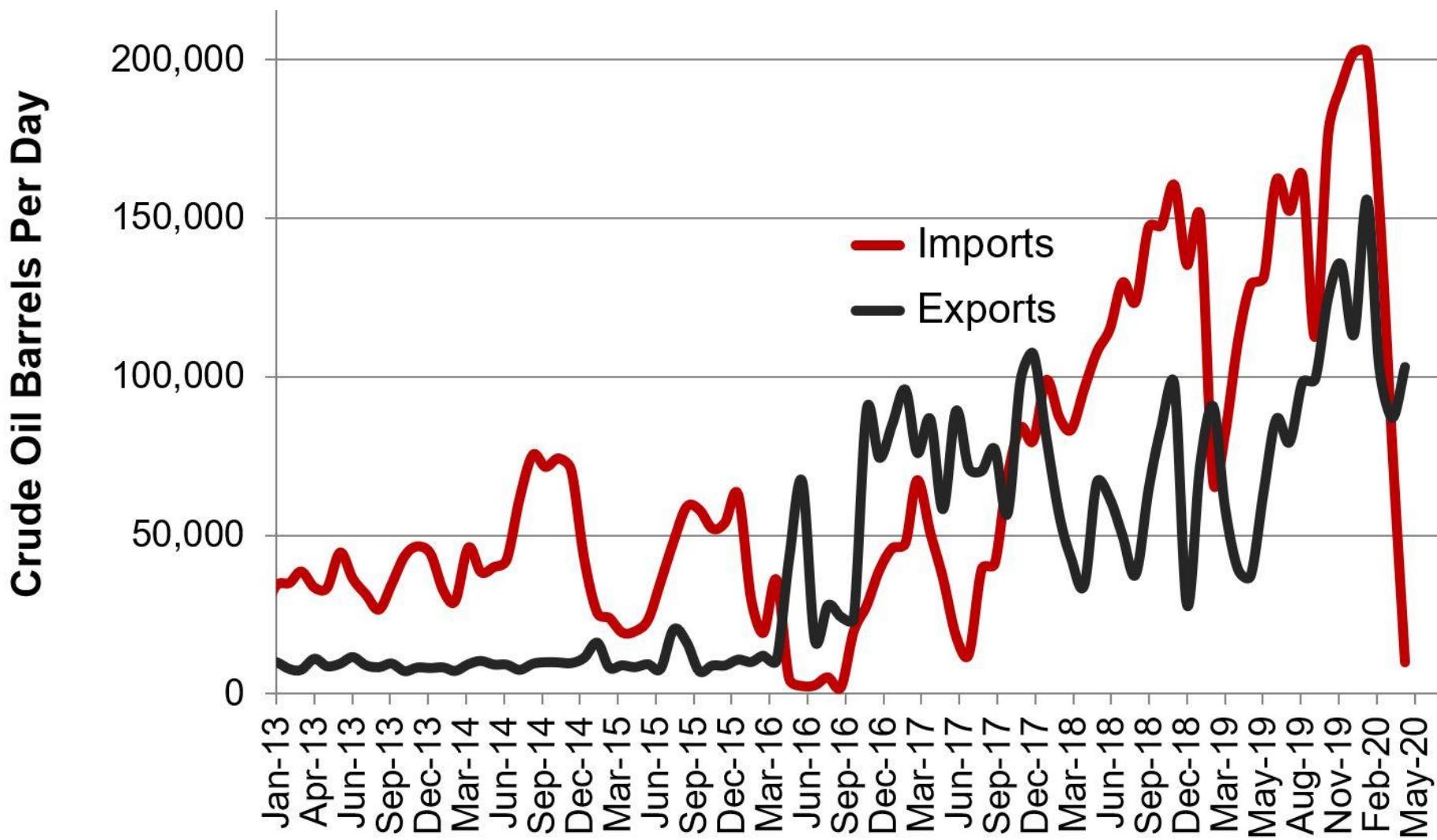
Major Rail Lines and Refineries



Crude Oil Prices – July 17, 2020



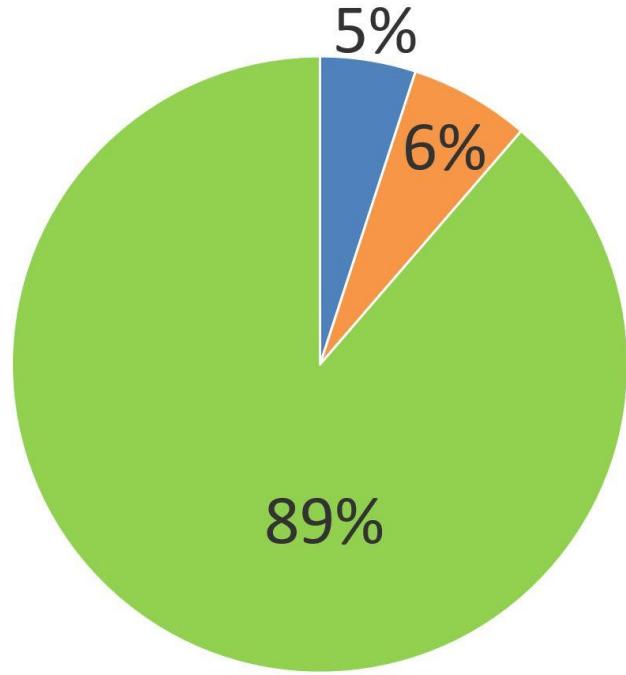
Williston Basin Truck/Rail Imports and Exports with Canada



Data for imports/exports chart is provided by the US International Trade Commission and represents traffic across US/Canada border in the Williston Basin area.



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.

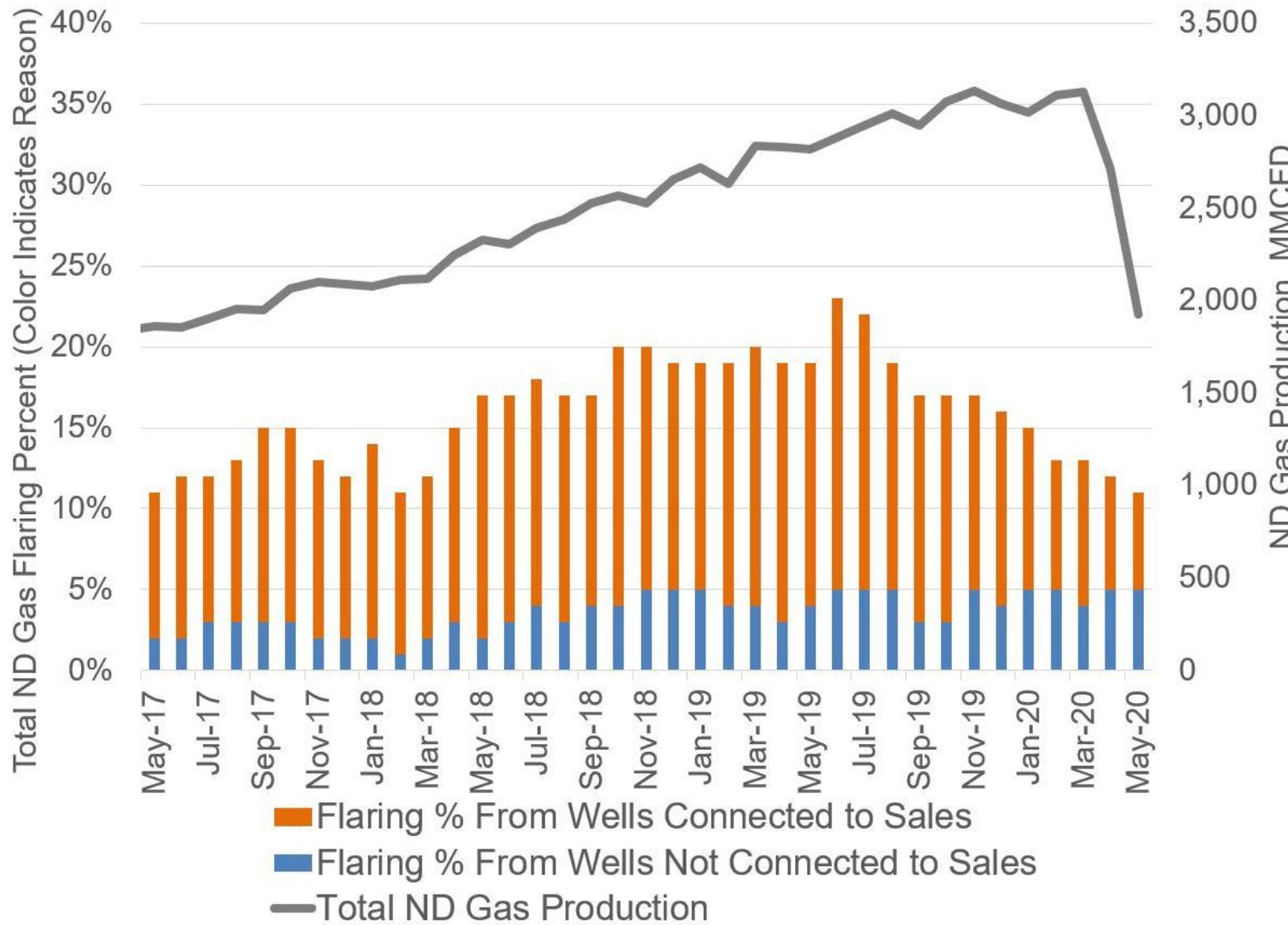
Simple Terms

Blue – Lack of pipelines
Orange – Challenges on existing infrastructure

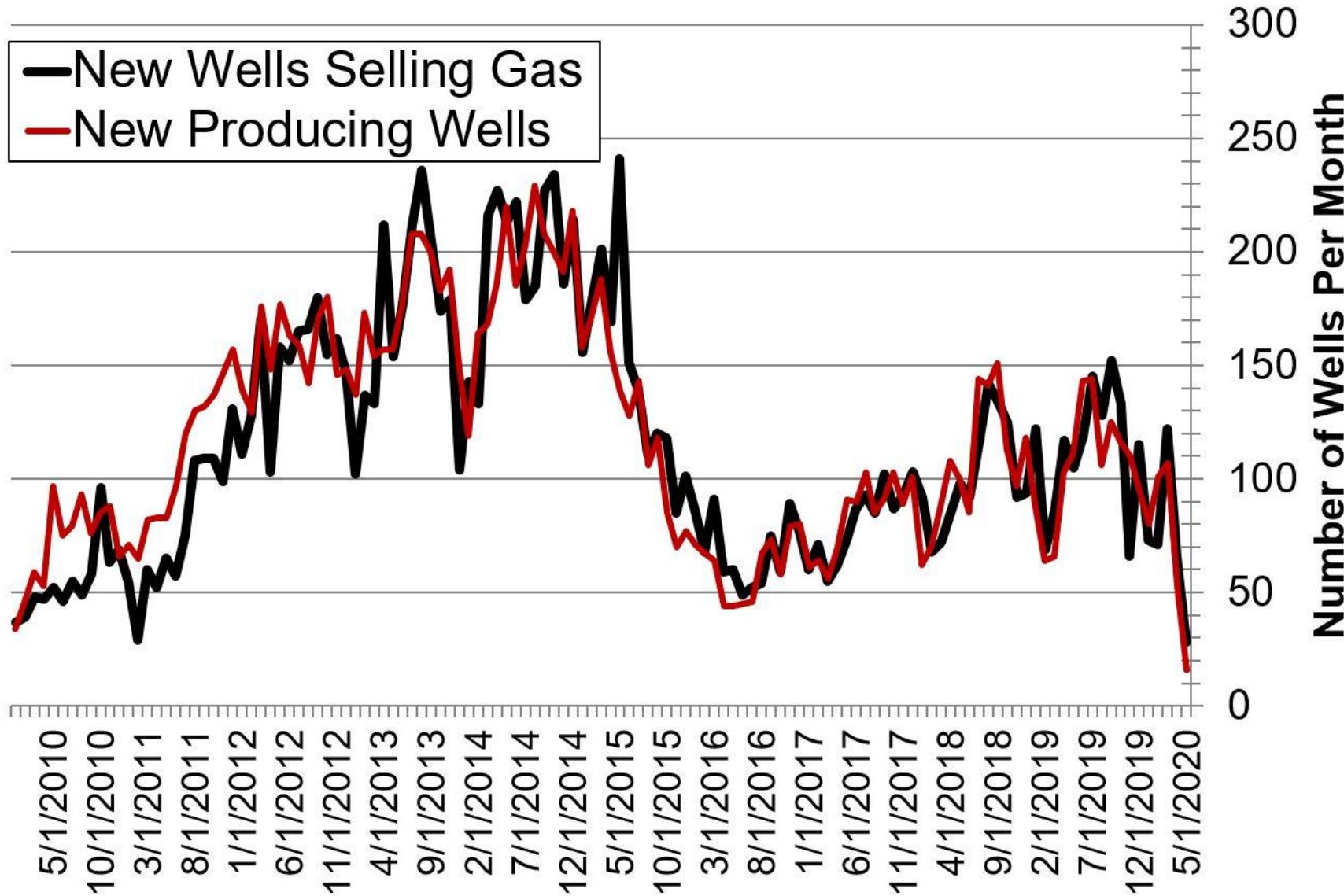
May 2020 Data – Non-Confidential Wells



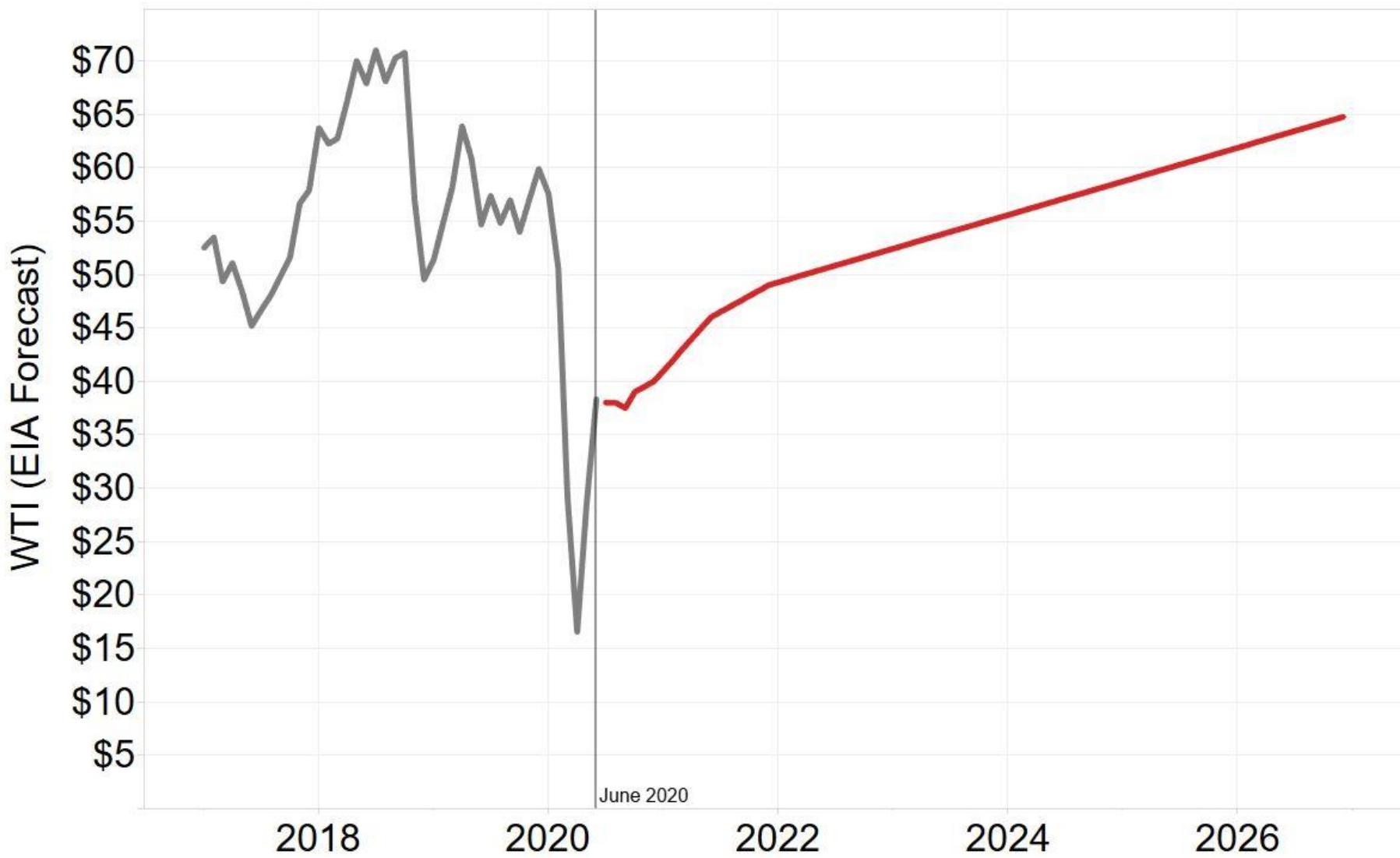
Solving the Flaring Challenge



Solving the Flaring Challenge



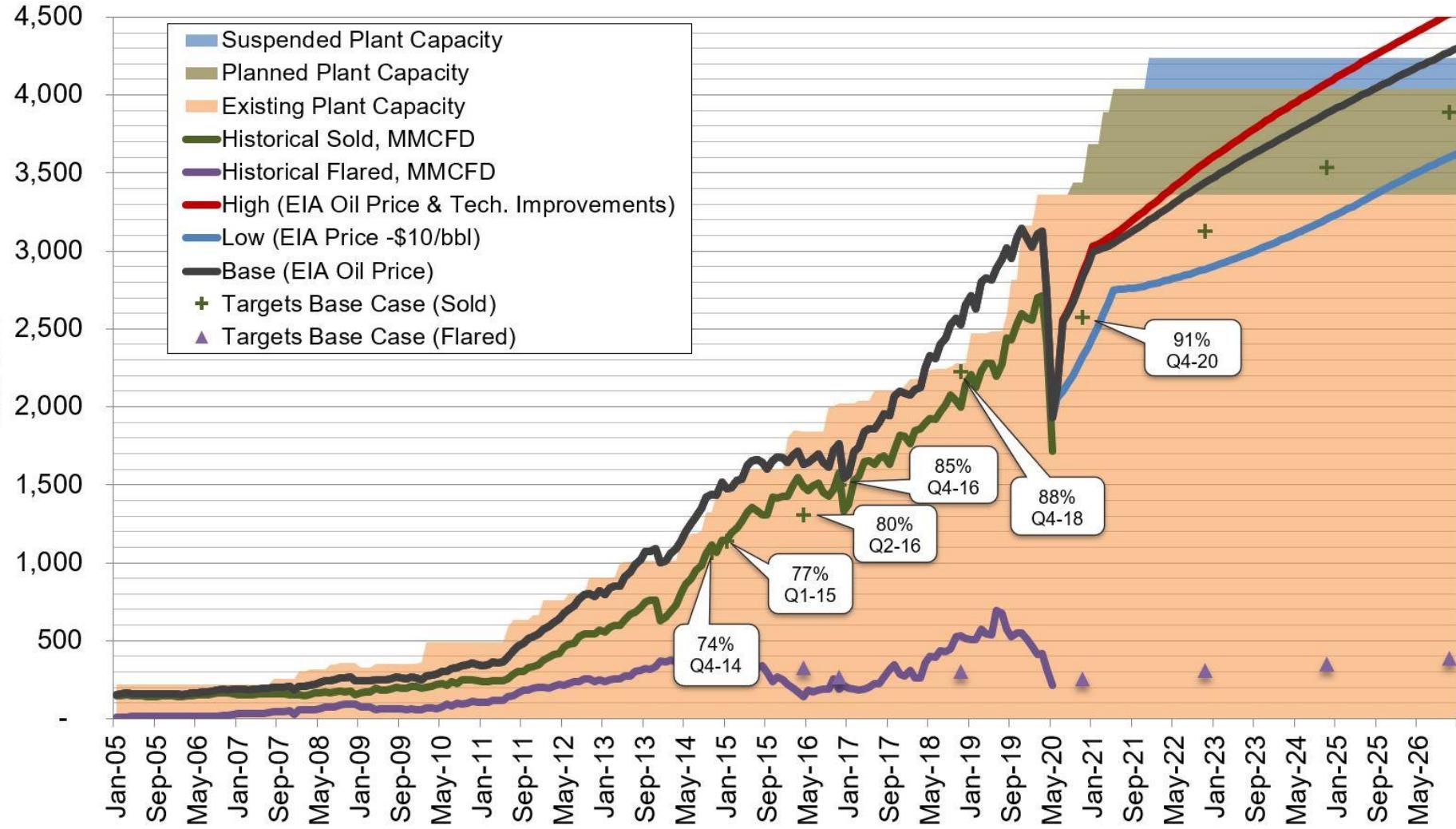
EIA Oil Price Forecast*



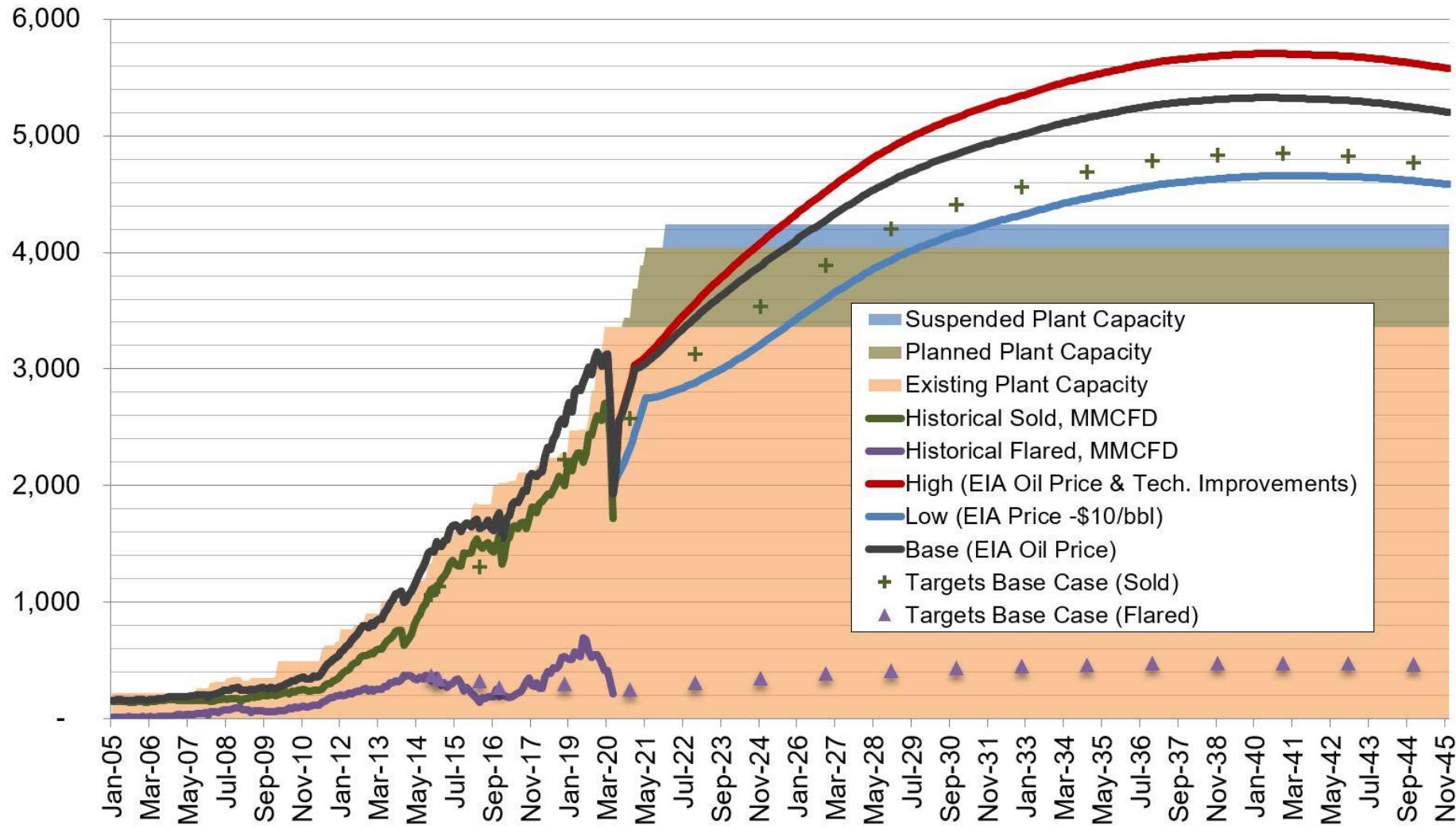
*EIA July 2020 SEO and January 2020 AEO Blend



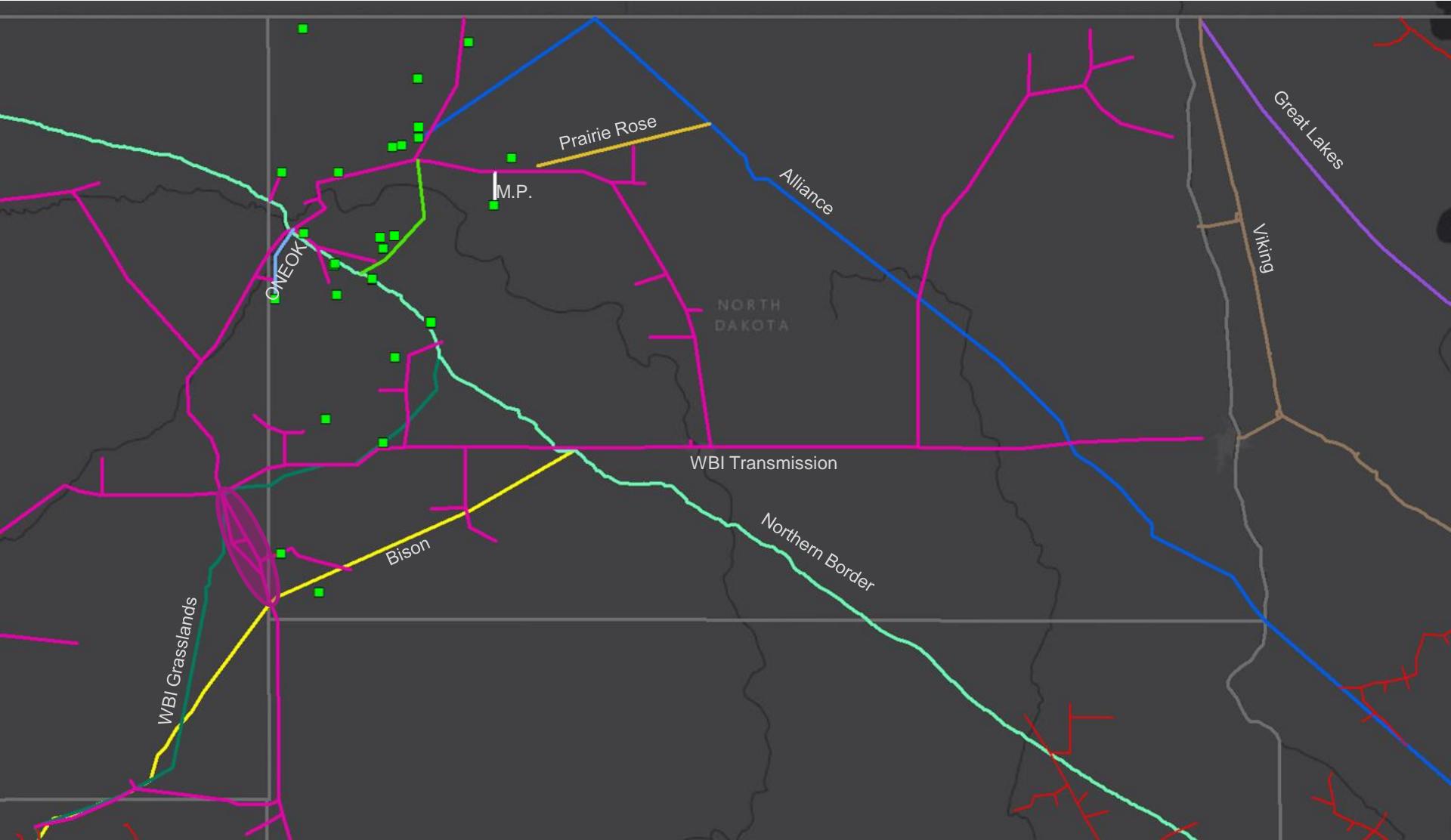
Solving the Flaring Challenge



Solving the Flaring Challenge



Major Gas Pipeline and Processing Infrastructure



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**Know what's below.
Call before you dig.**



JJ Kringstad - North Dakota Pipeline Authority

Websites:

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www.northdakotapipelines.com

