



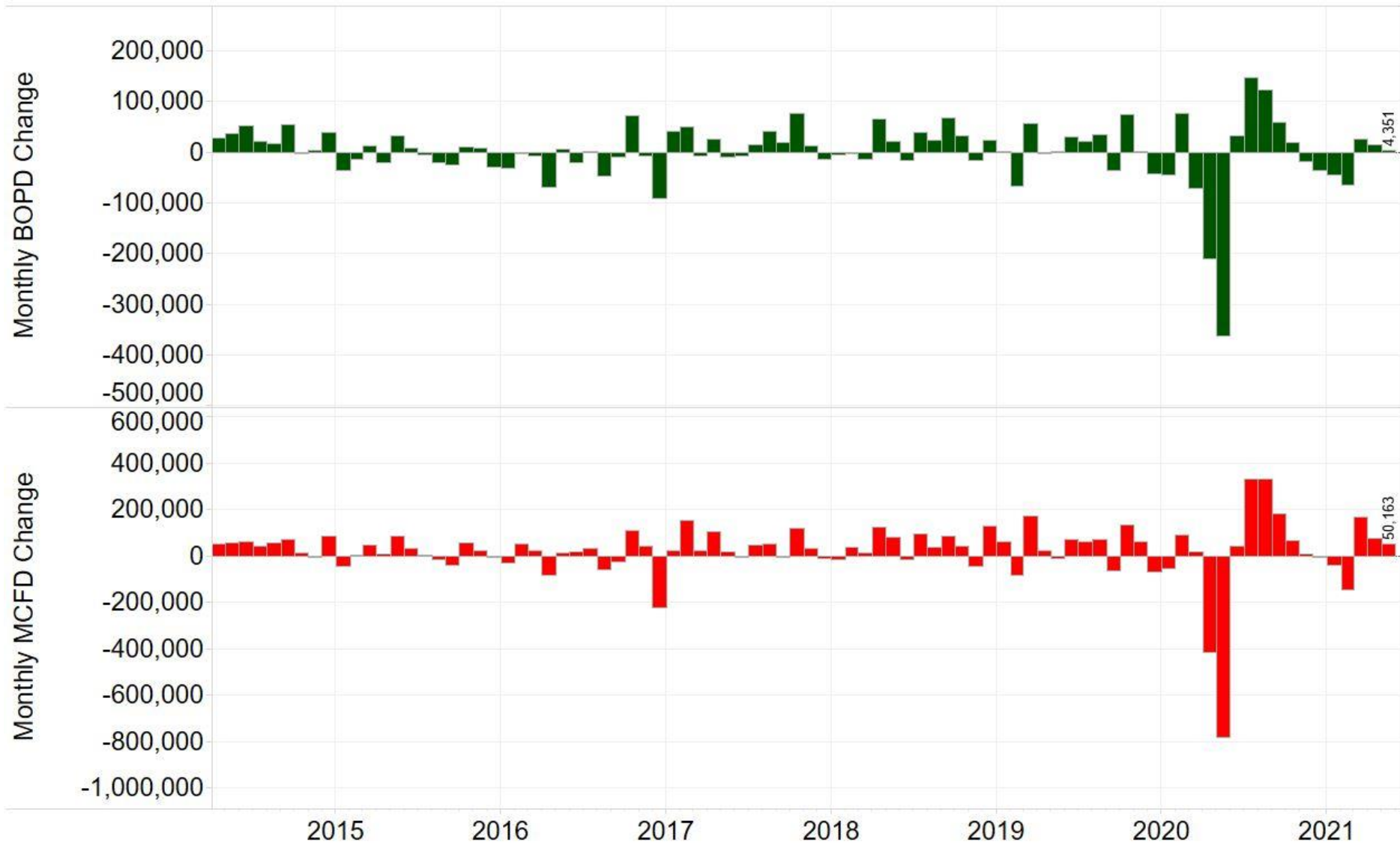
July 2021 Monthly Update
North Dakota Pipeline Authority
Justin J. Kringstad
July 20, 2021

US Williston Basin Oil Production - 2021

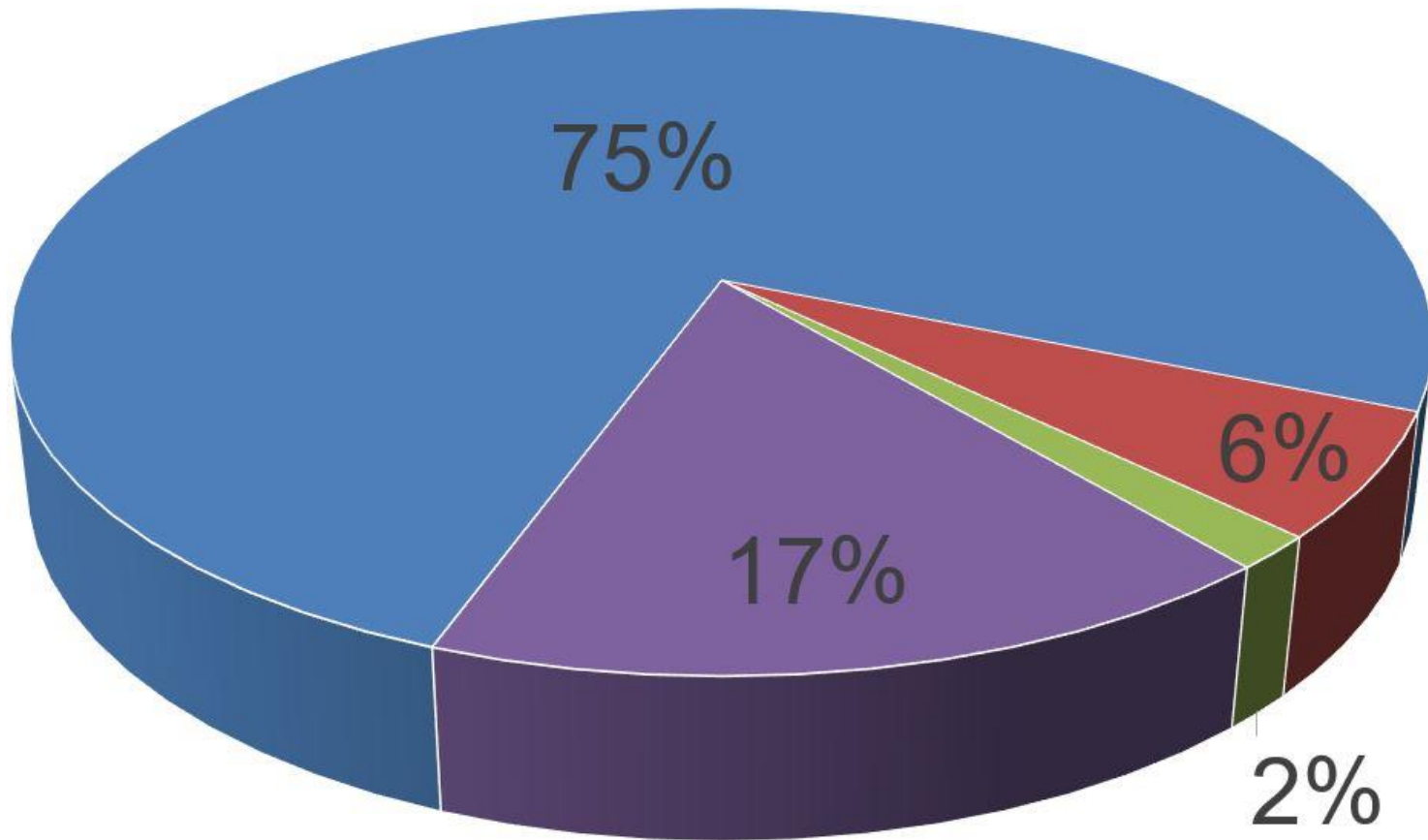
MONTH	ND	Eastern MT*	SD	TOTAL
January	1,147,375	50,115	2,874	1,200,364
February	1,083,557	47,889	2,829	1,134,275
March	1,108,906	48,265	2,744	1,159,914
April	1,123,166	38,381	2,644	1,164,191
May	1,127,517			
June				
July				
August				
September				
October				
November				
December				



North Dakota Monthly Production Change



Estimated Williston Basin Oil Transportation



■ Pipeline Export

■ Refined

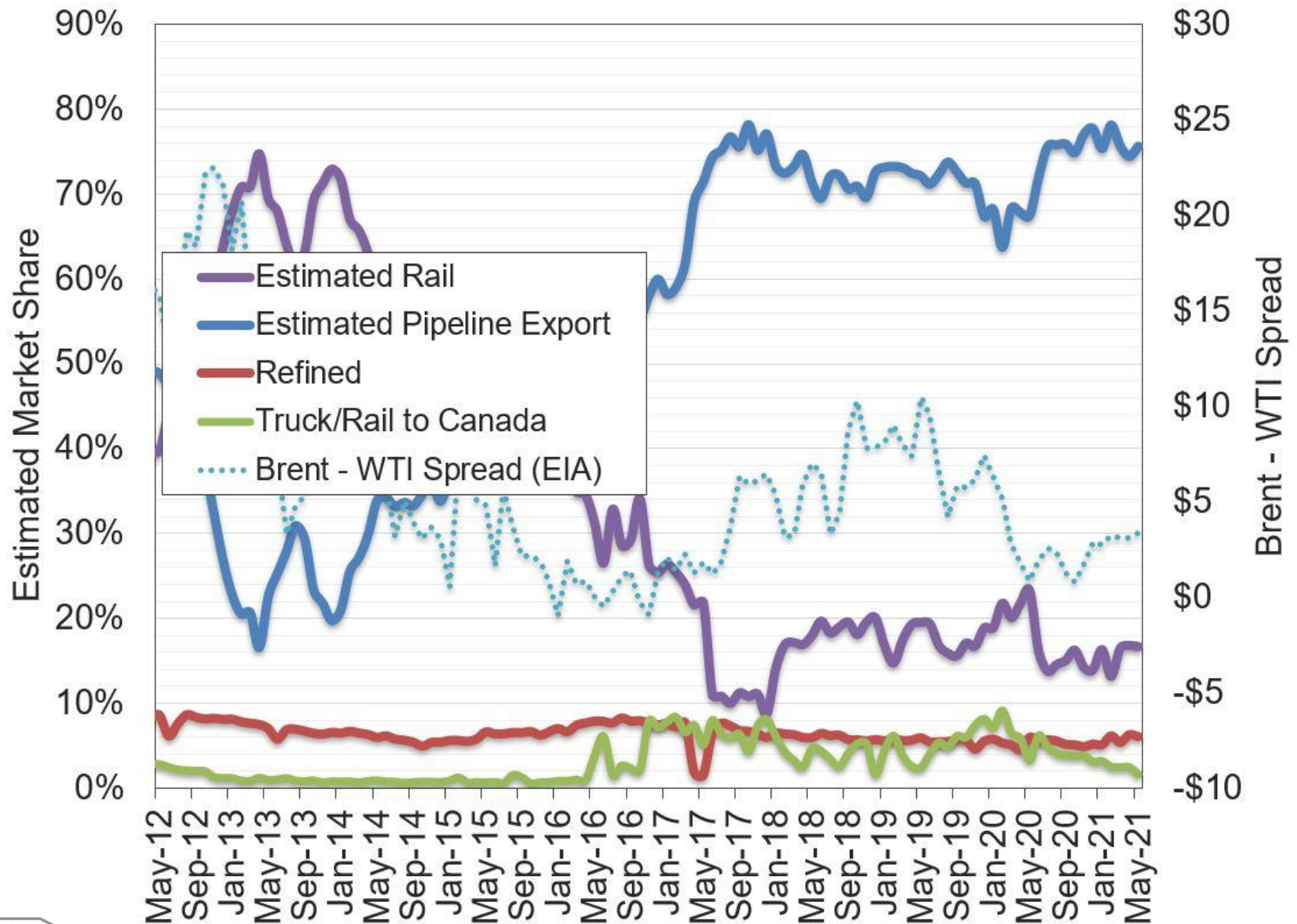
■ Truck/Rail to Canada

■ Estimated Rail

May 2021



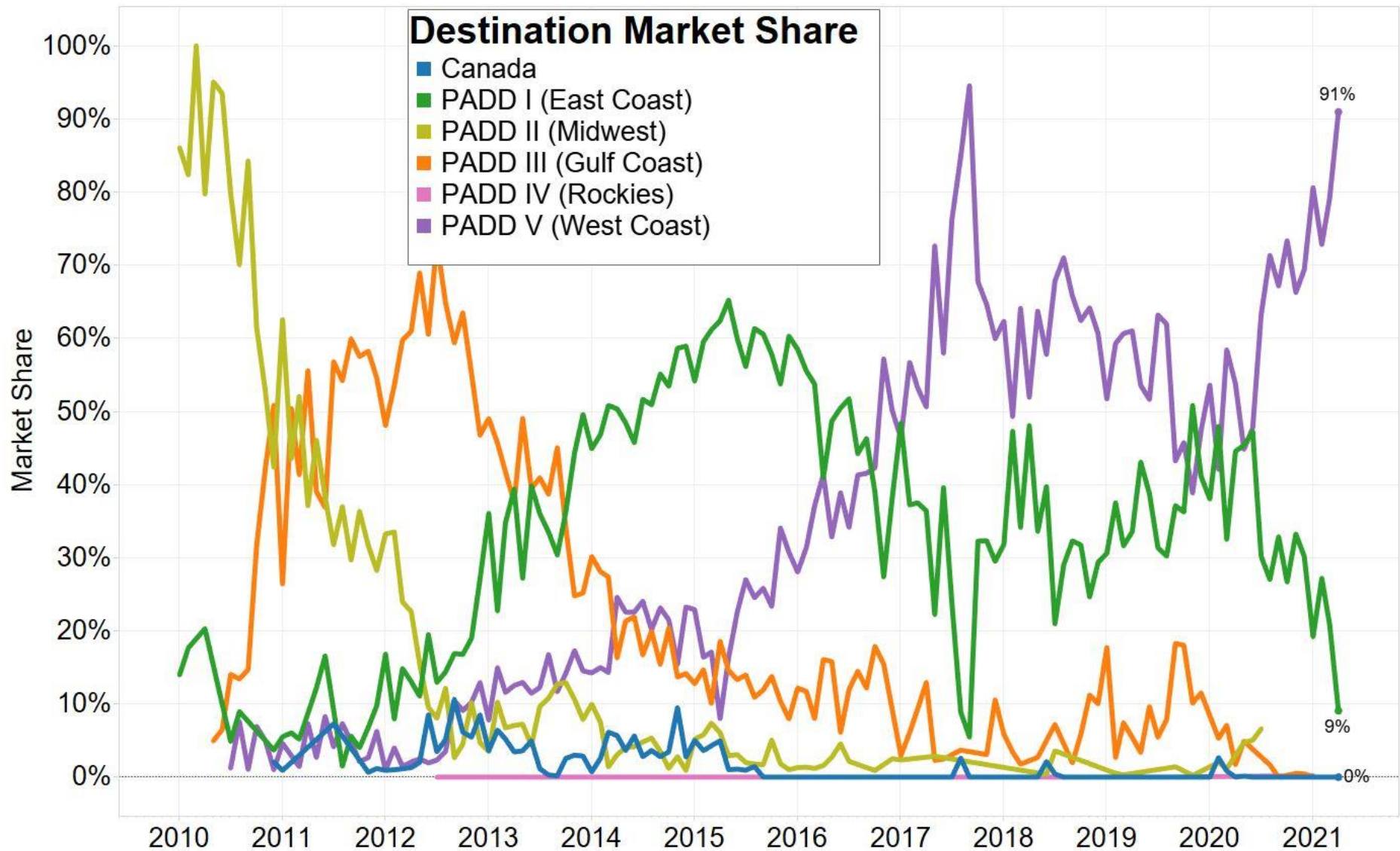
Estimated Williston Basin Oil Transportation



Estimated ND Rail Export Volumes



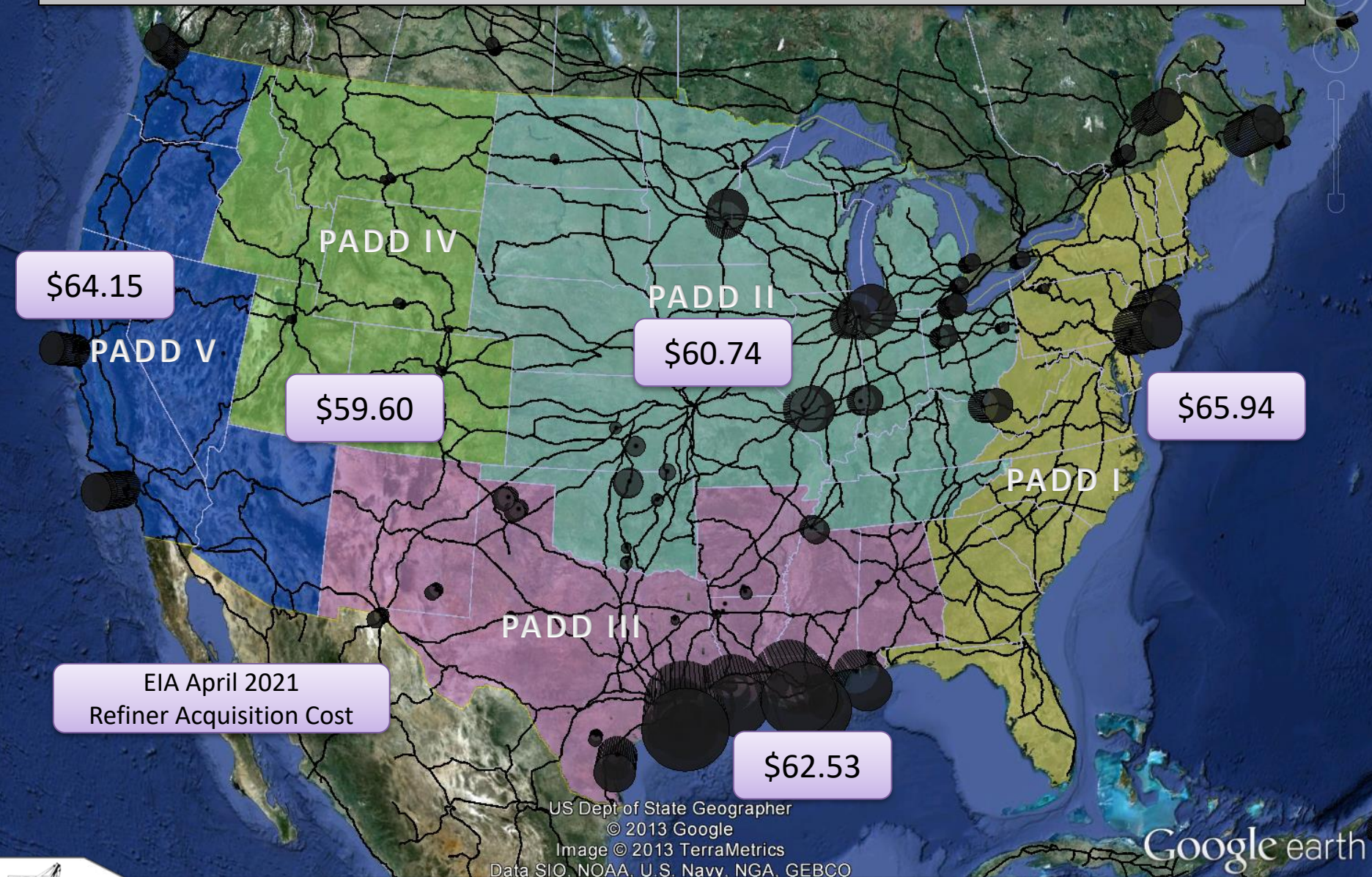
Rail Destinations Market Share (Apr. 2021)



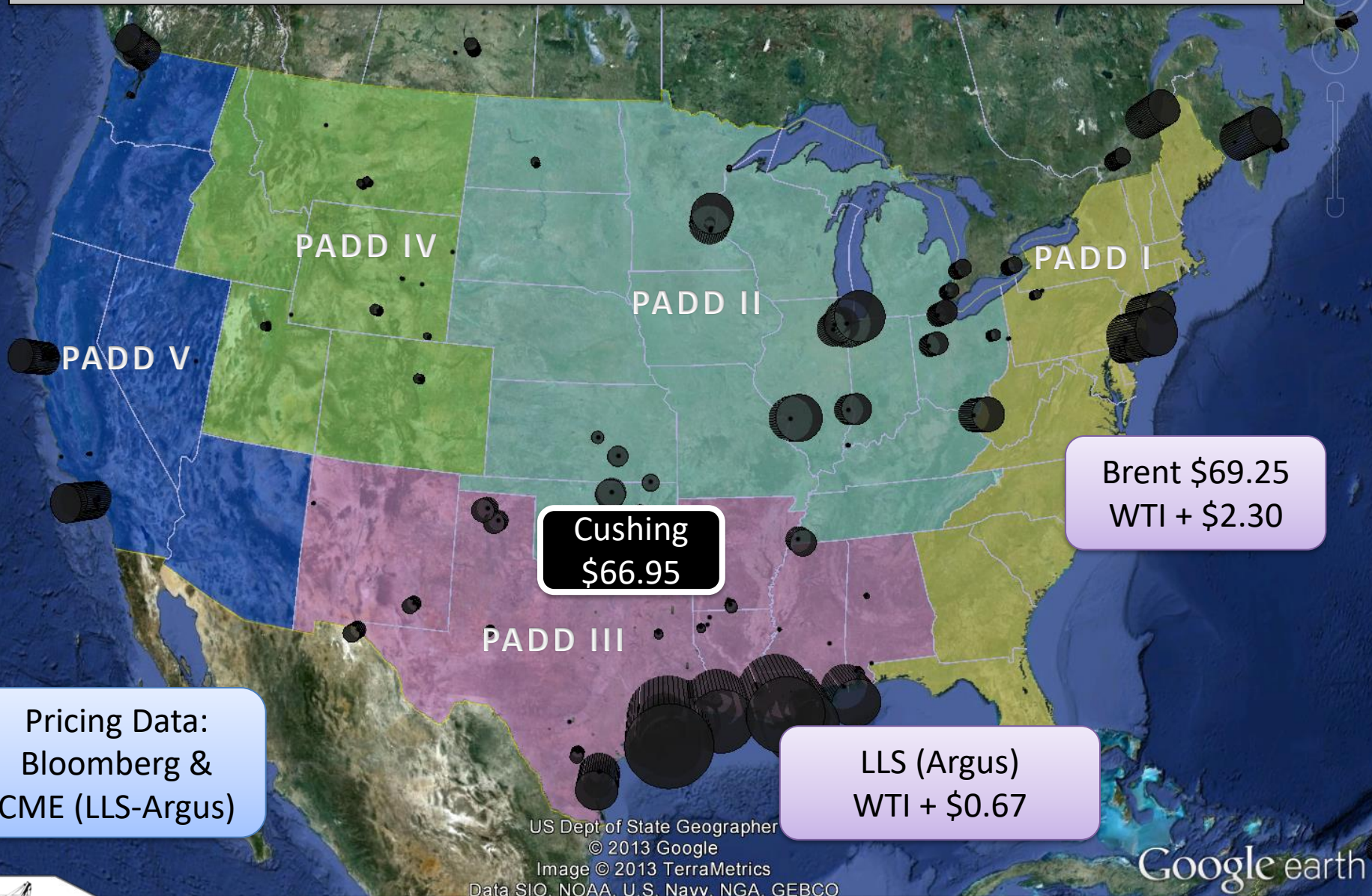
Data for Rail Destination Market Share Provided by the US Energy Information Administration



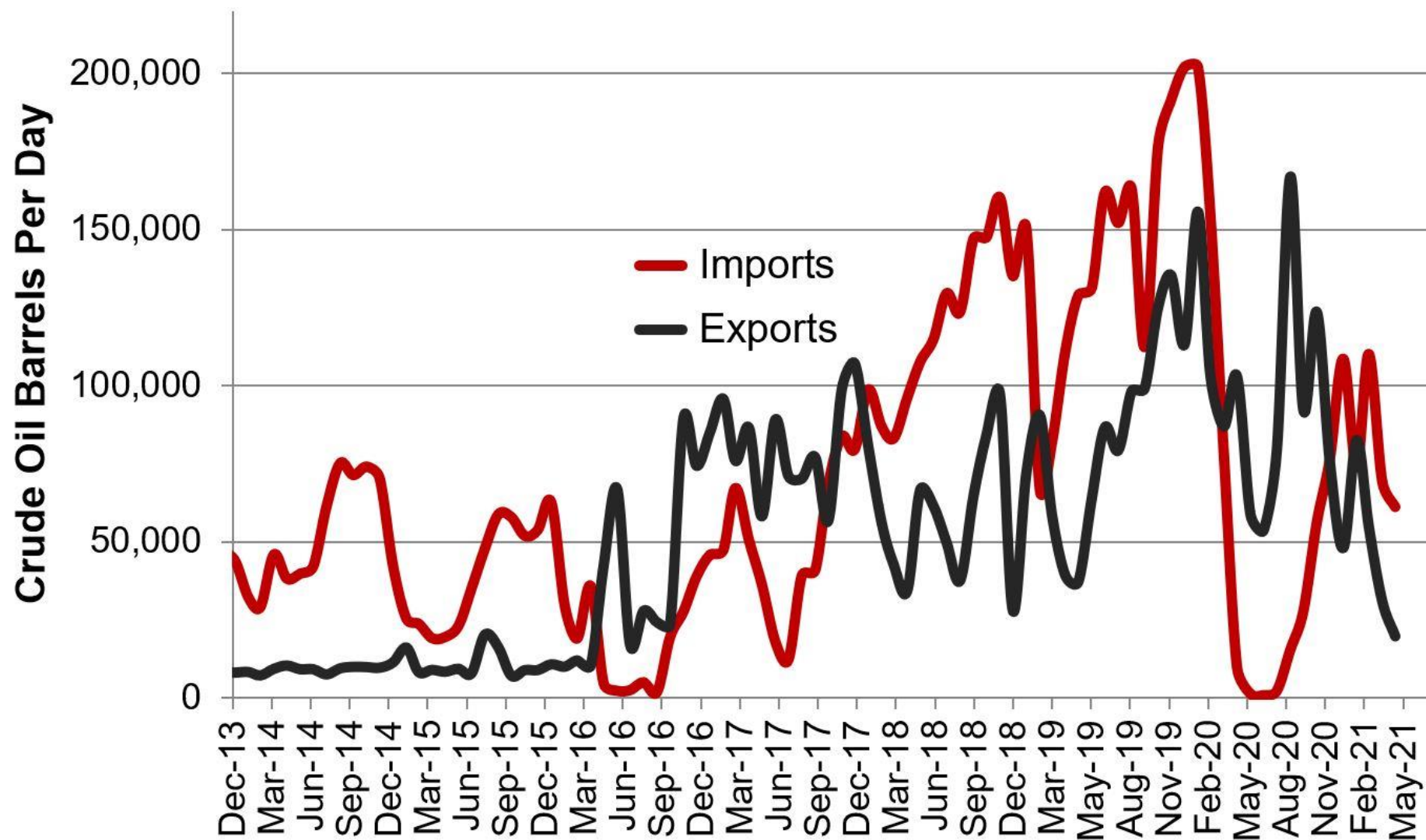
Major Rail Lines and Refineries



Crude Oil Prices – July 20, 2021



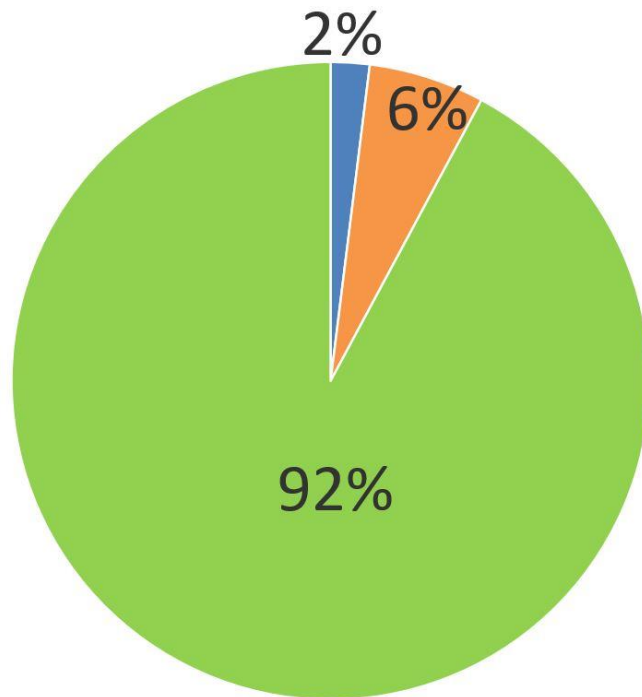
Williston Basin Truck/Rail Imports and Exports with Canada



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

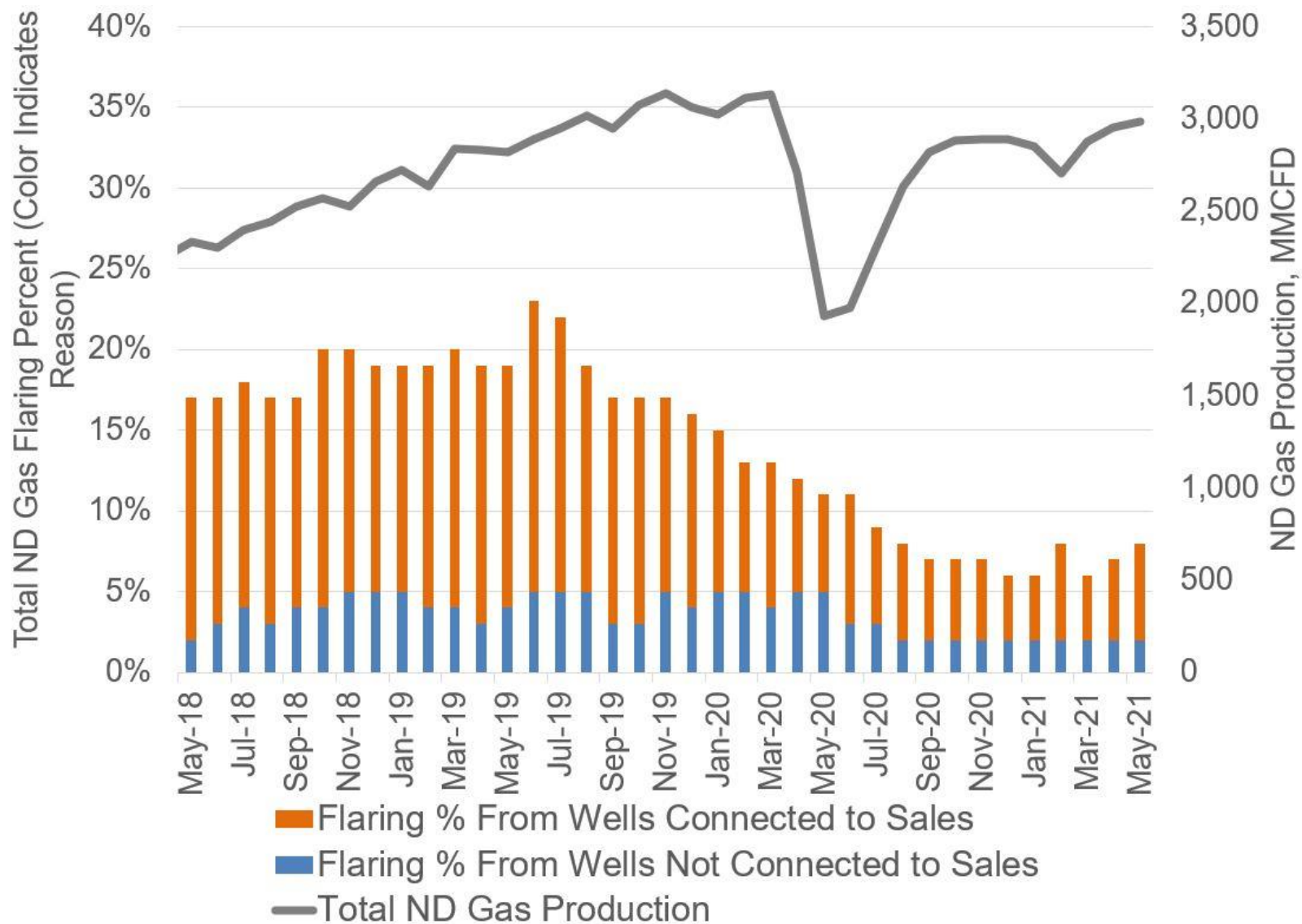
Blue – Lack of pipelines

Orange – Challenges on existing infrastructure

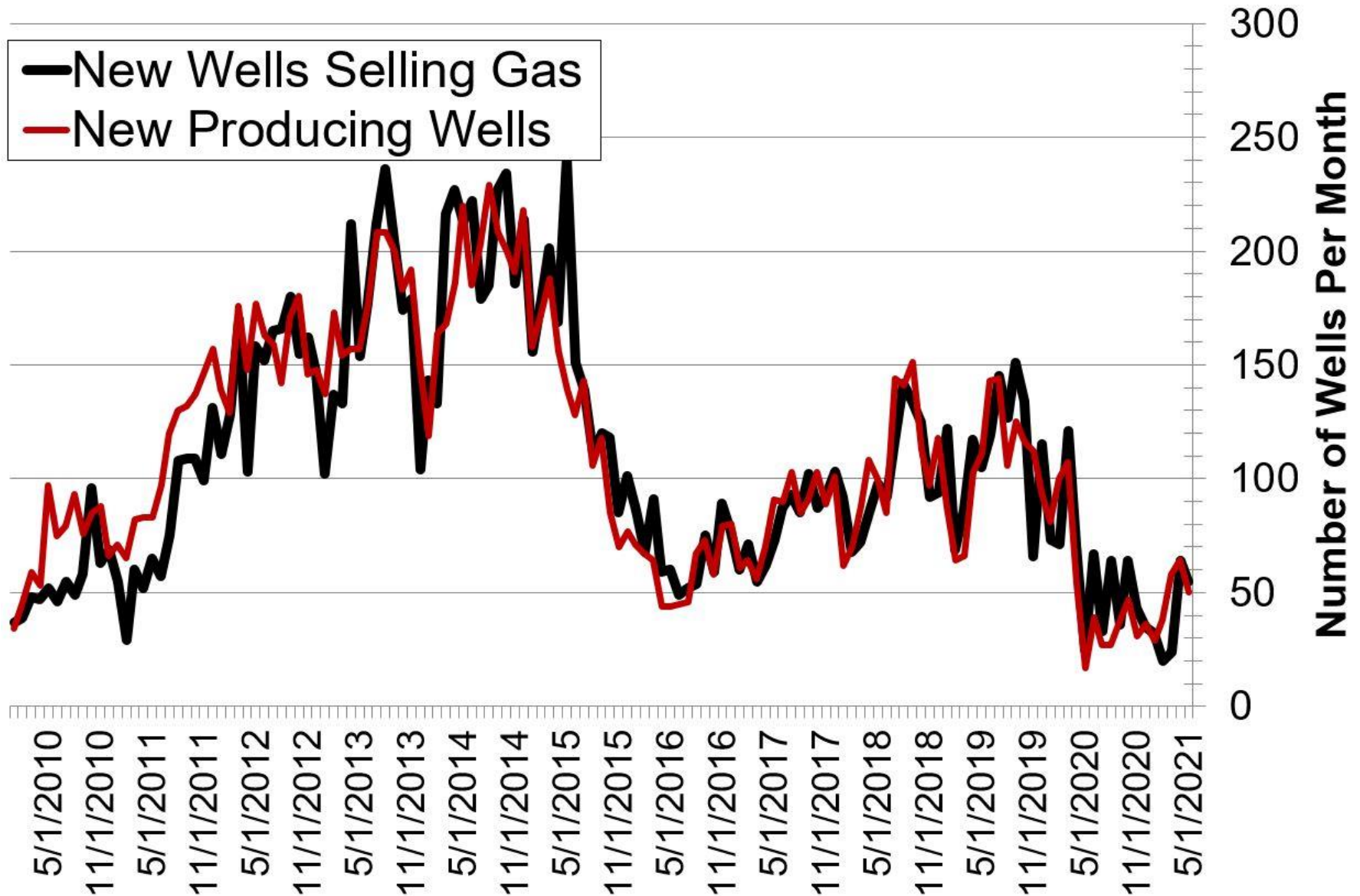
May 2021 Data – Non-Confidential Wells



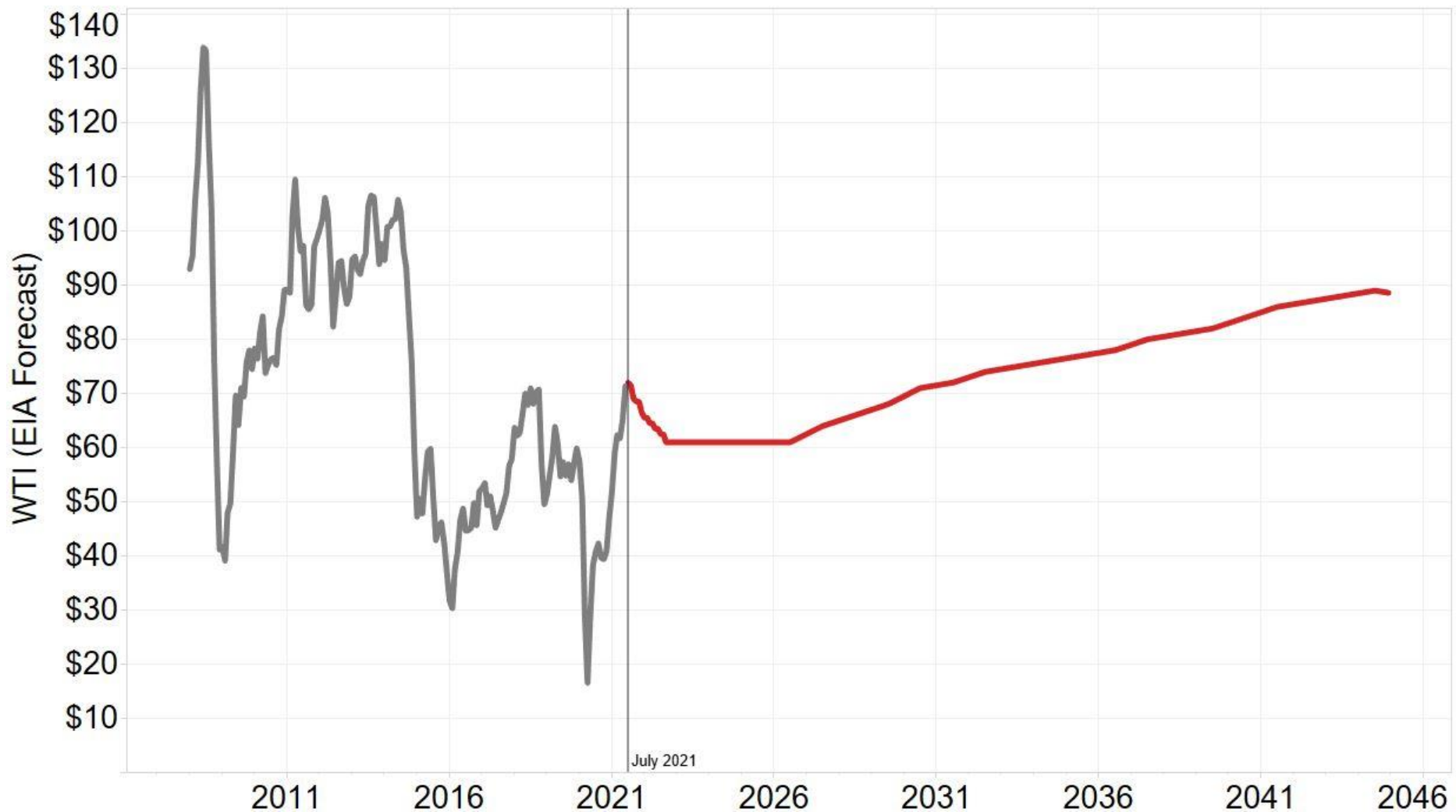
Solving the Flaring Challenge



Solving the Flaring Challenge



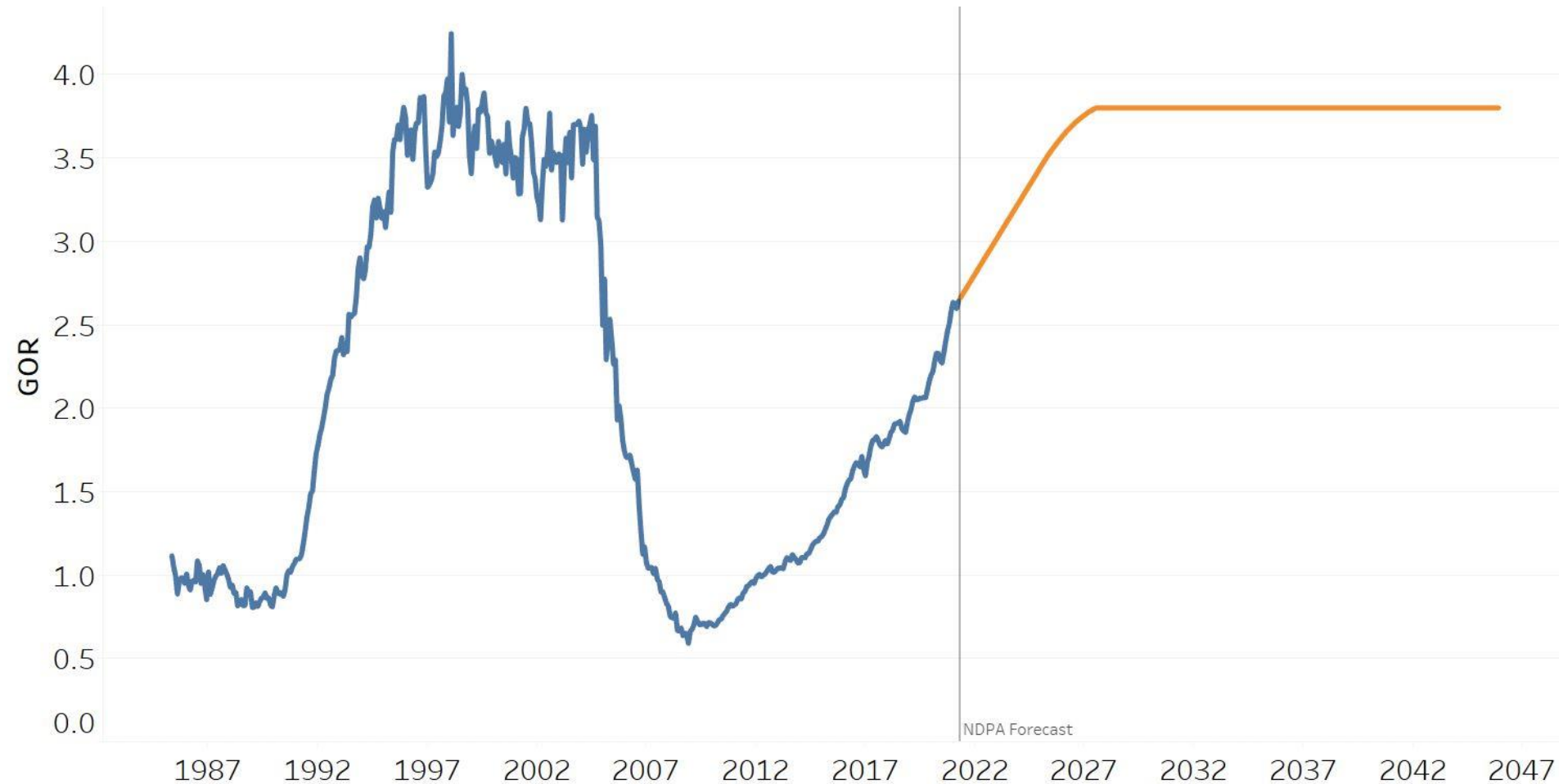
EIA Oil Price Forecast*



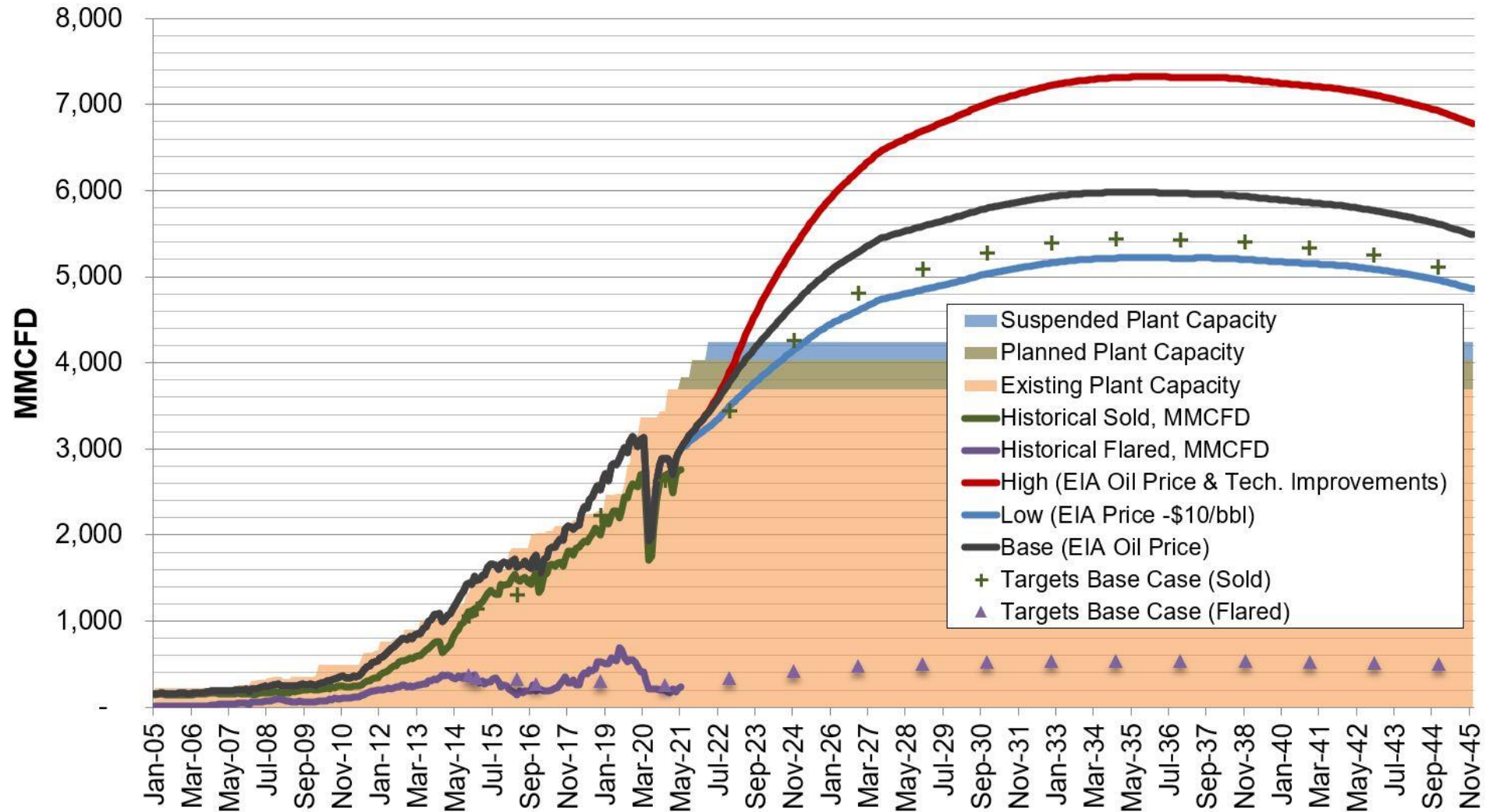
**EIA July 2021 SEO and February 2021 AEO Blend*



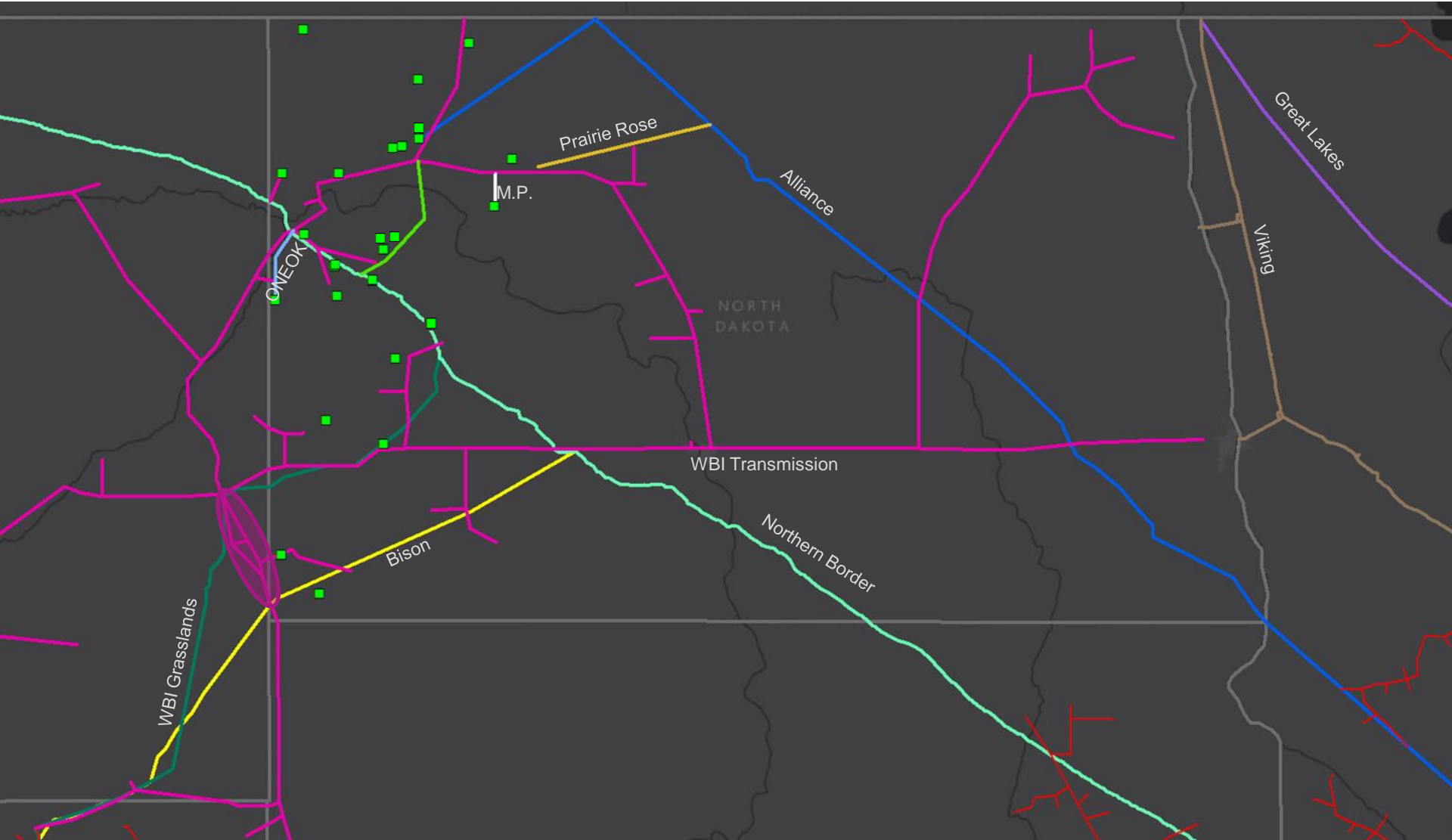
Gas-Oil Ratio Outlook



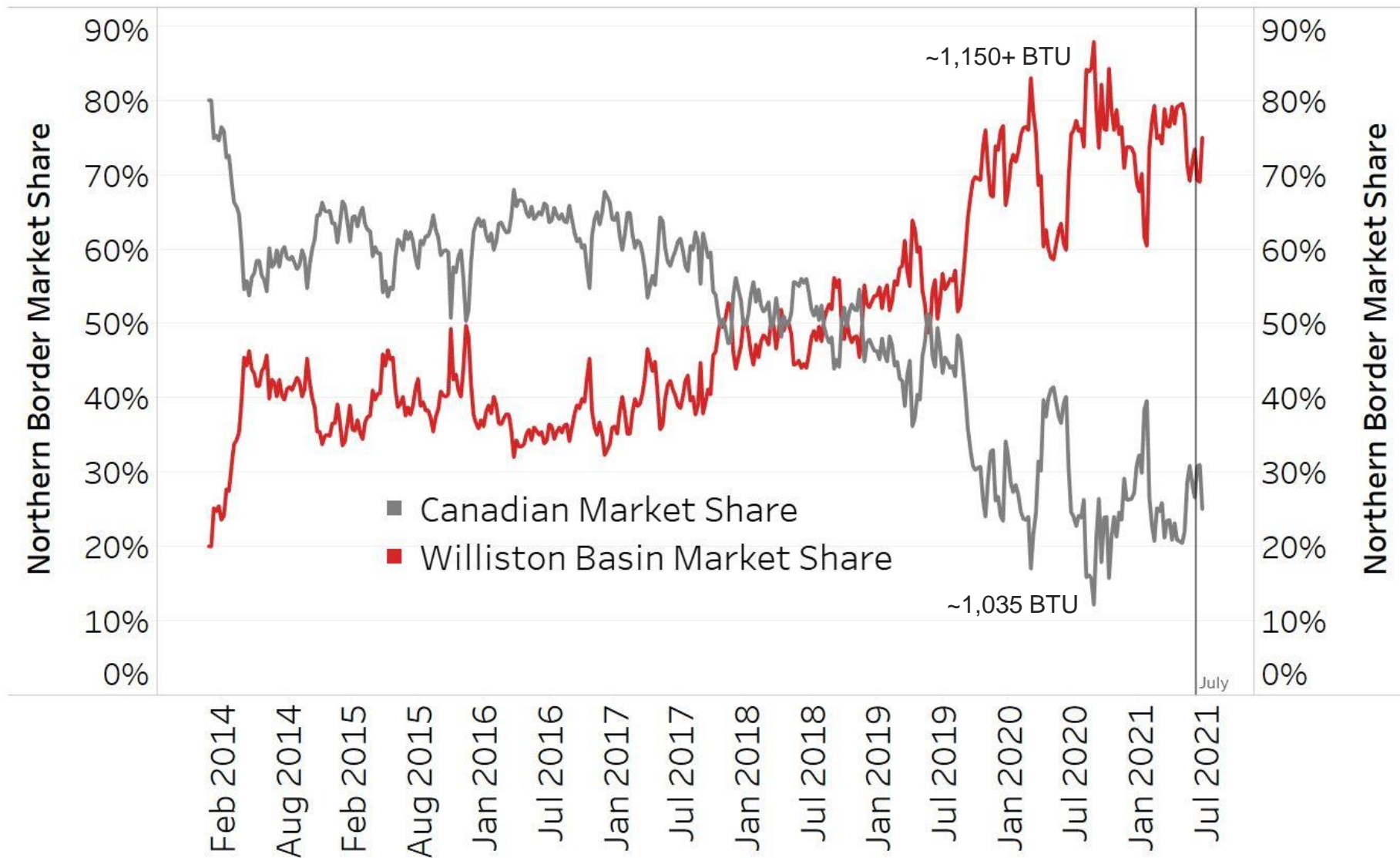
Solving the Flaring Challenge



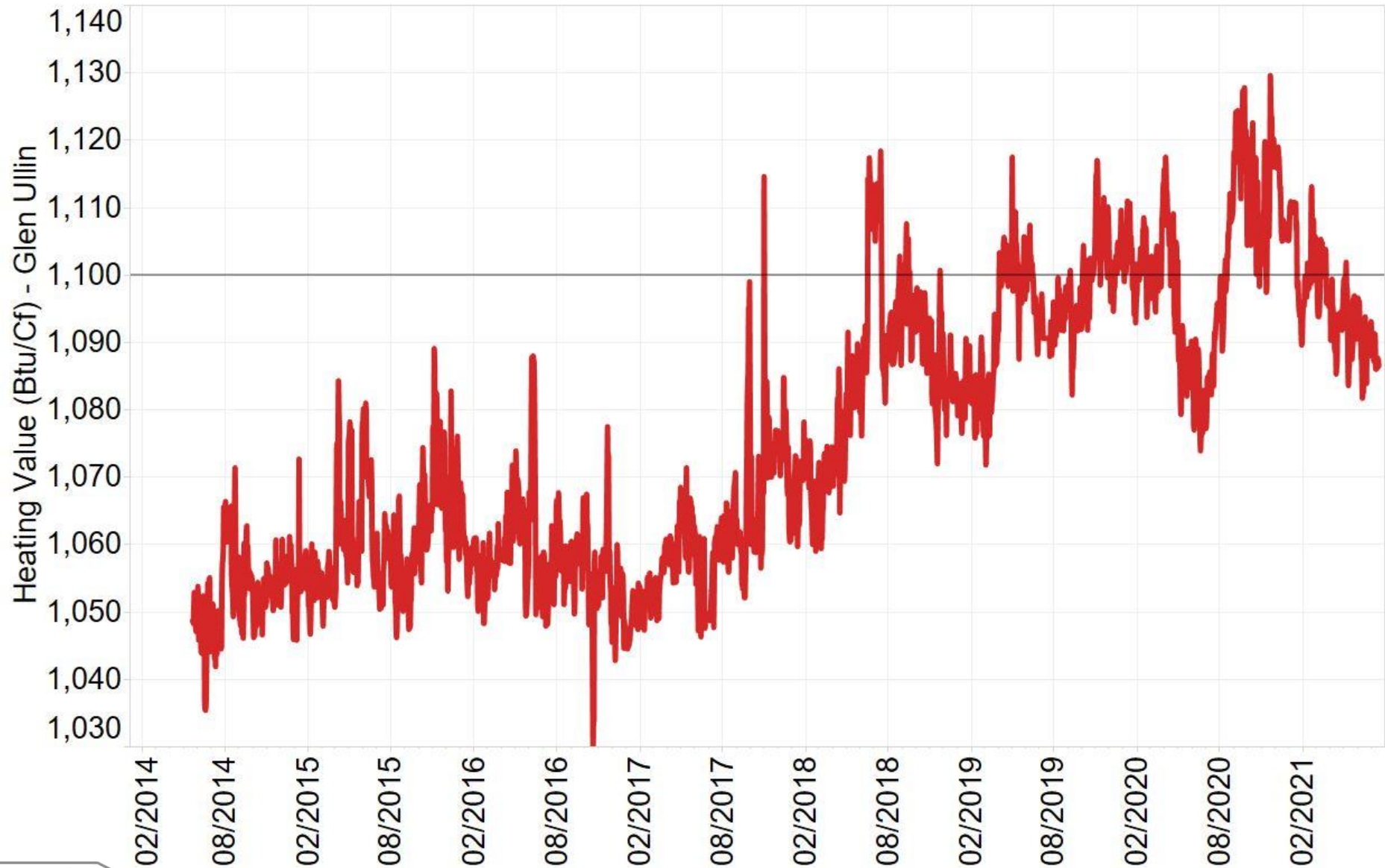
Major Gas Pipeline and Processing Infrastructure



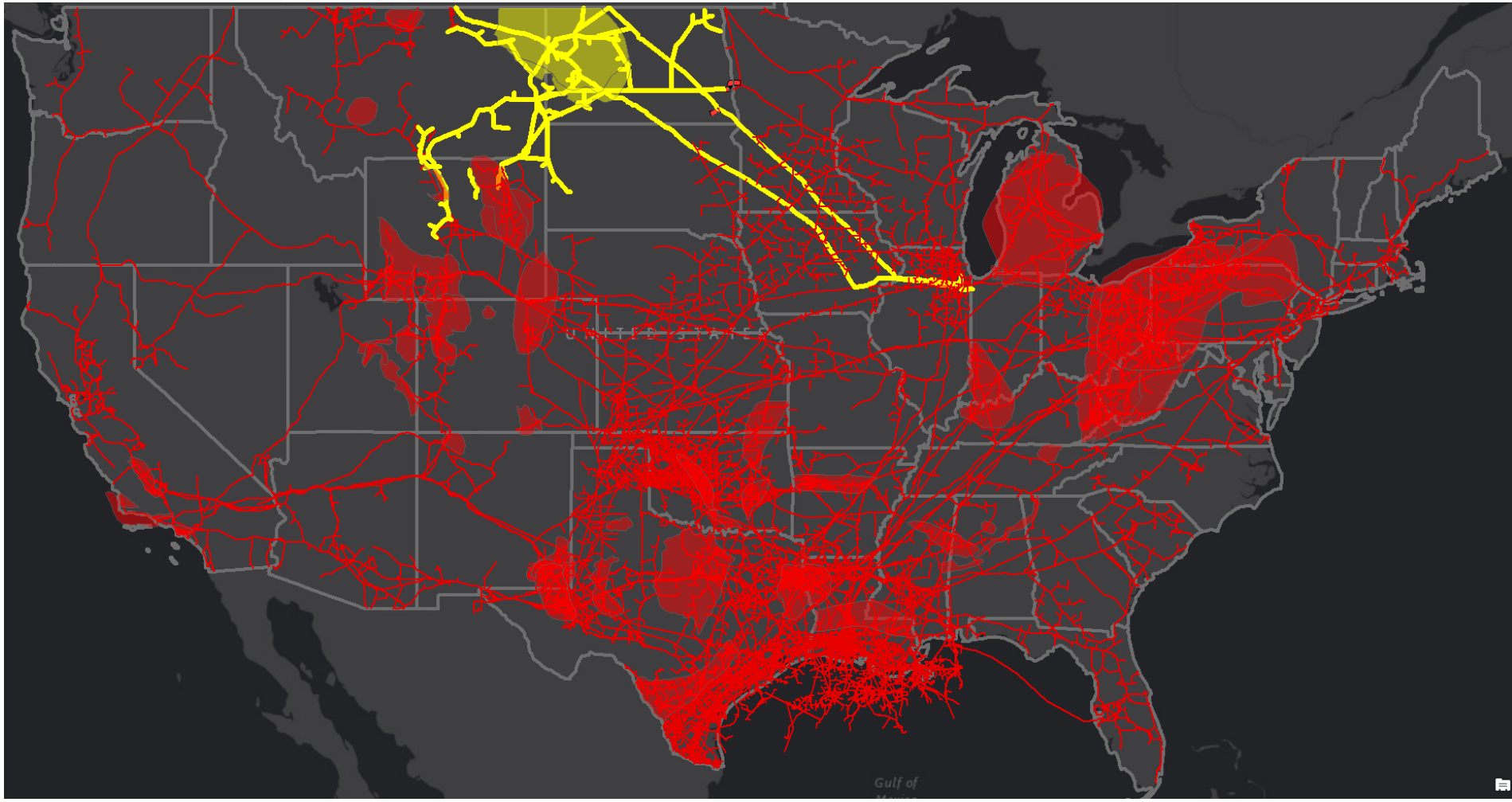
Northern Border Pipeline Market Share



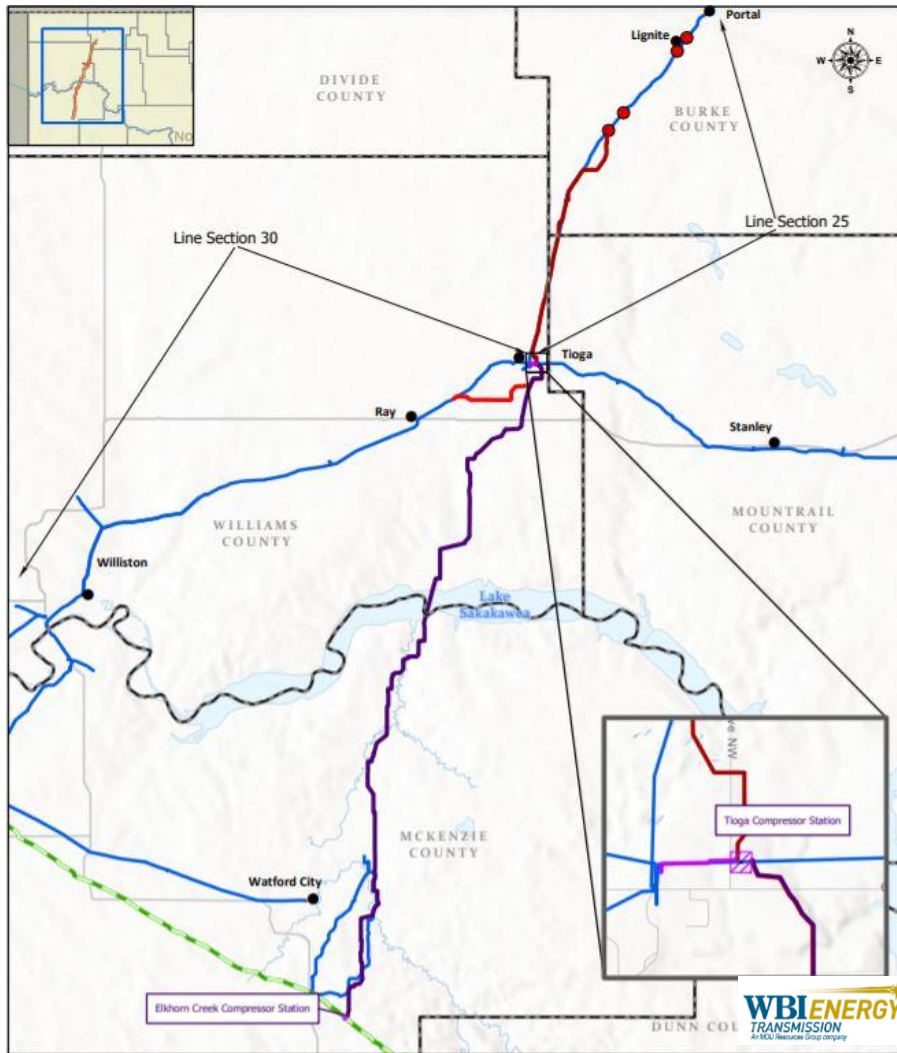
Northern Border BTU at Glen Ullin, ND



Bakken Natural Gas Infrastructure



WBI Energy Transmission North Bakken Expansion Project



Project Highlights

- ~62 Miles - 24" Pipeline
- ~20 Miles - 12" Pipeline
- ~\$260 Million
- Preliminary Capacity 250,000 MCFD
- Expandable to 375,000+ MCFD
- Q4 2021 Proposed Completion
- Residue Gas Service From North of Lake Sakakawea to Northern Border Pipeline in McKenzie County



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