

Pipeline Authority Monthly Update

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February 13, 2025

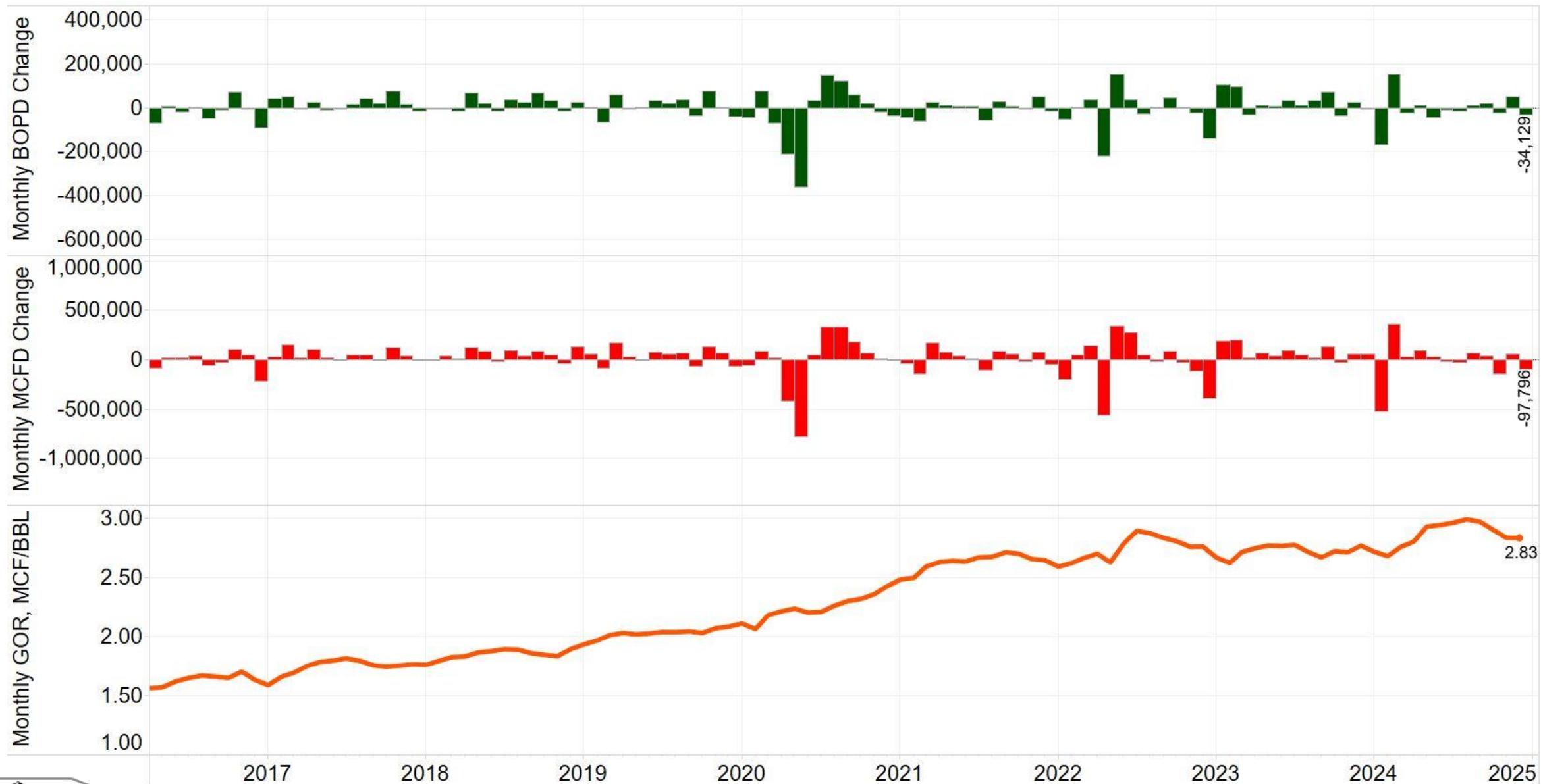


US Williston Basin Oil Production - 2024

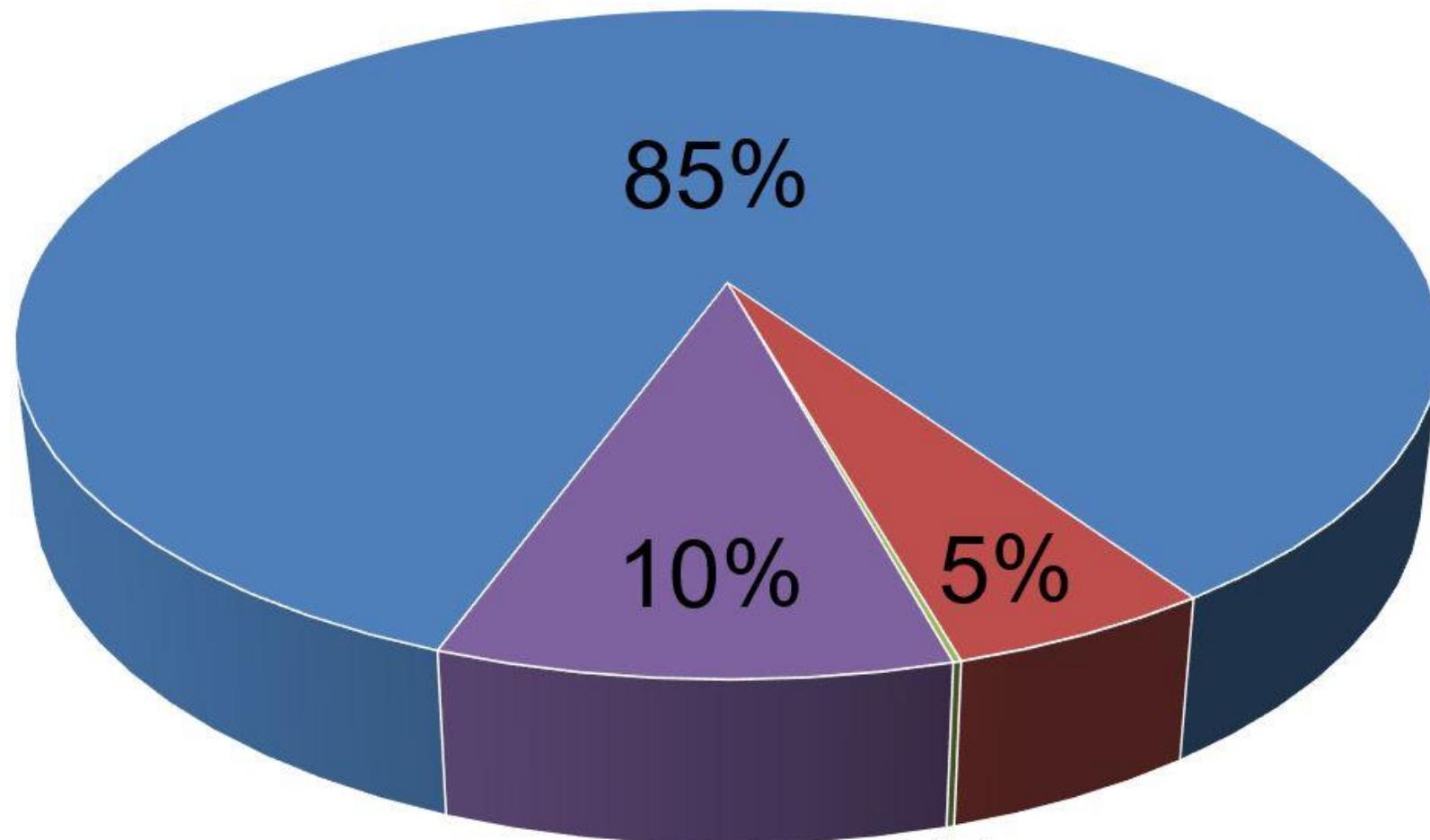
MONTH	ND	Eastern MT*	SD	TOTAL
January	1,105,214	59,255	2,312	1,166,780
February	1,256,126	66,329	2,412	1,324,867
March	1,231,476	70,662	2,590	1,304,728
April	1,243,018	72,265	2,430	1,317,713
May	1,198,810	72,539	2,349	1,273,698
June	1,186,415	71,550	2,370	1,260,335
July	1,169,476	69,319	2,329	1,241,124
August	1,179,734	75,857	2,349	1,257,940
September	1,199,977	74,521	2,528	1,277,026
October	1,177,986	76,587	2,487	1,257,060
November	1,225,303			
December	1,191,174			



North Dakota Monthly Production Change



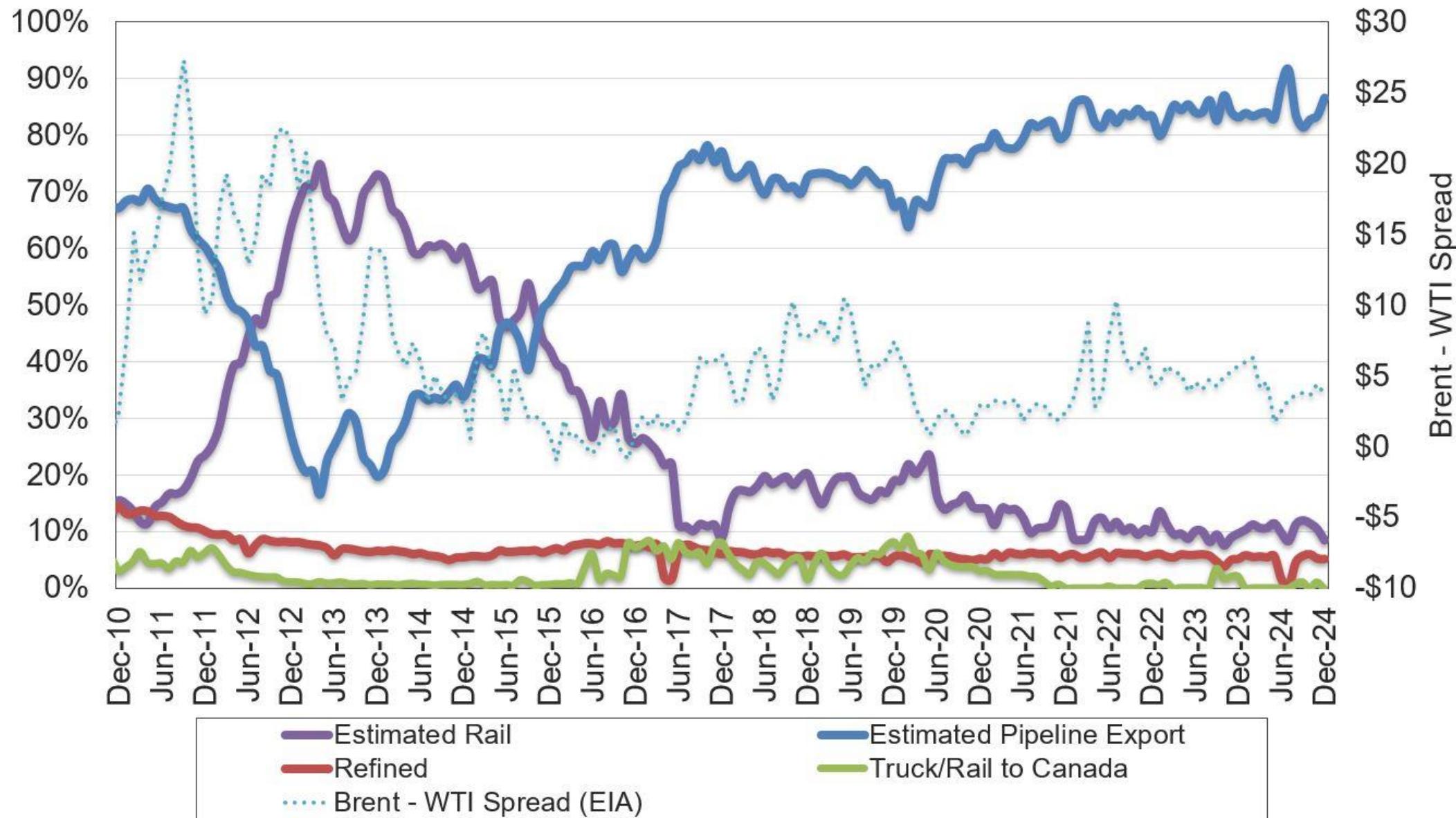
Estimated Williston Basin Oil Transportation



- Pipeline Export
- Truck/Rail to Canada
- Refined
- Estimated Rail



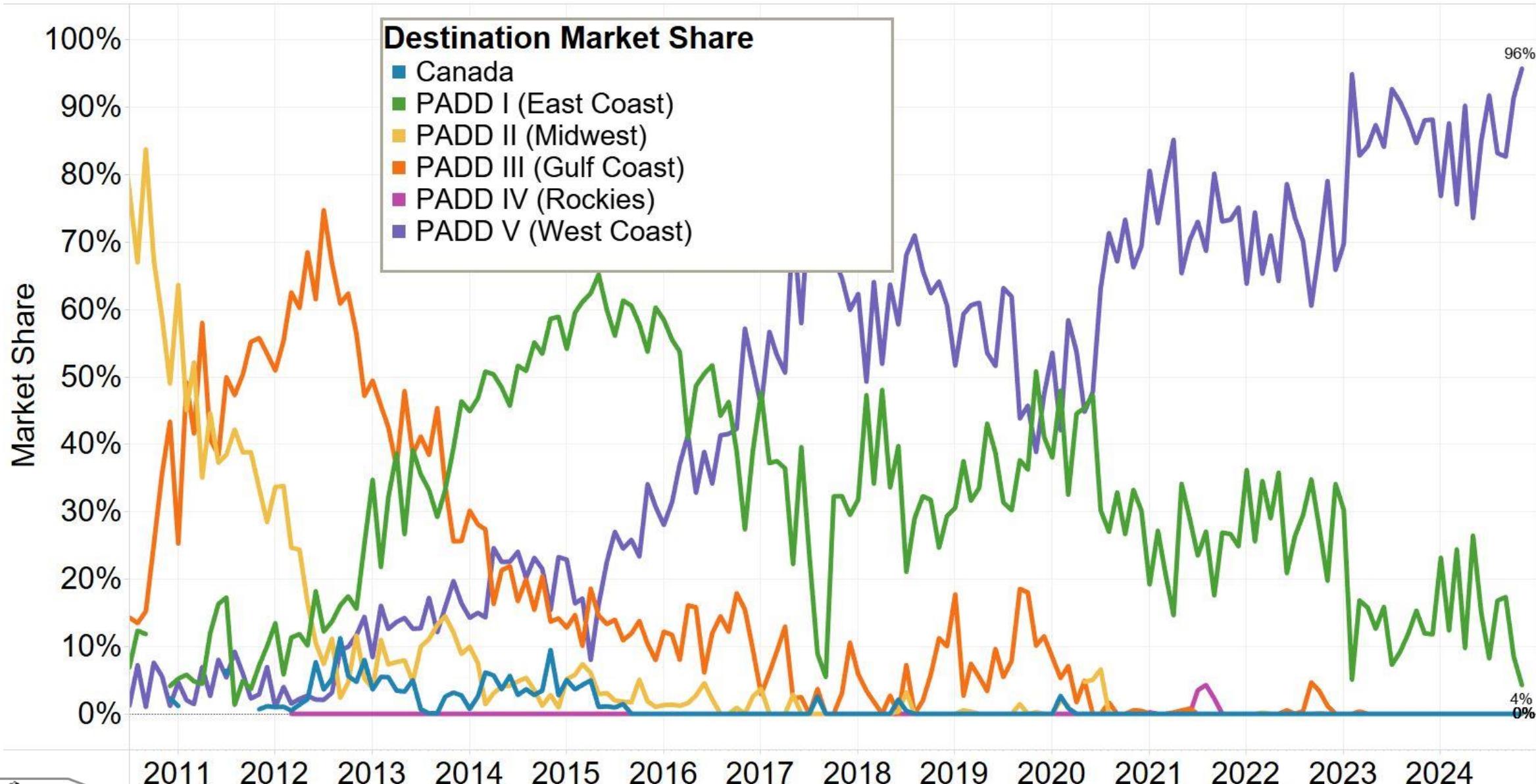
Estimated Williston Basin Oil Transportation



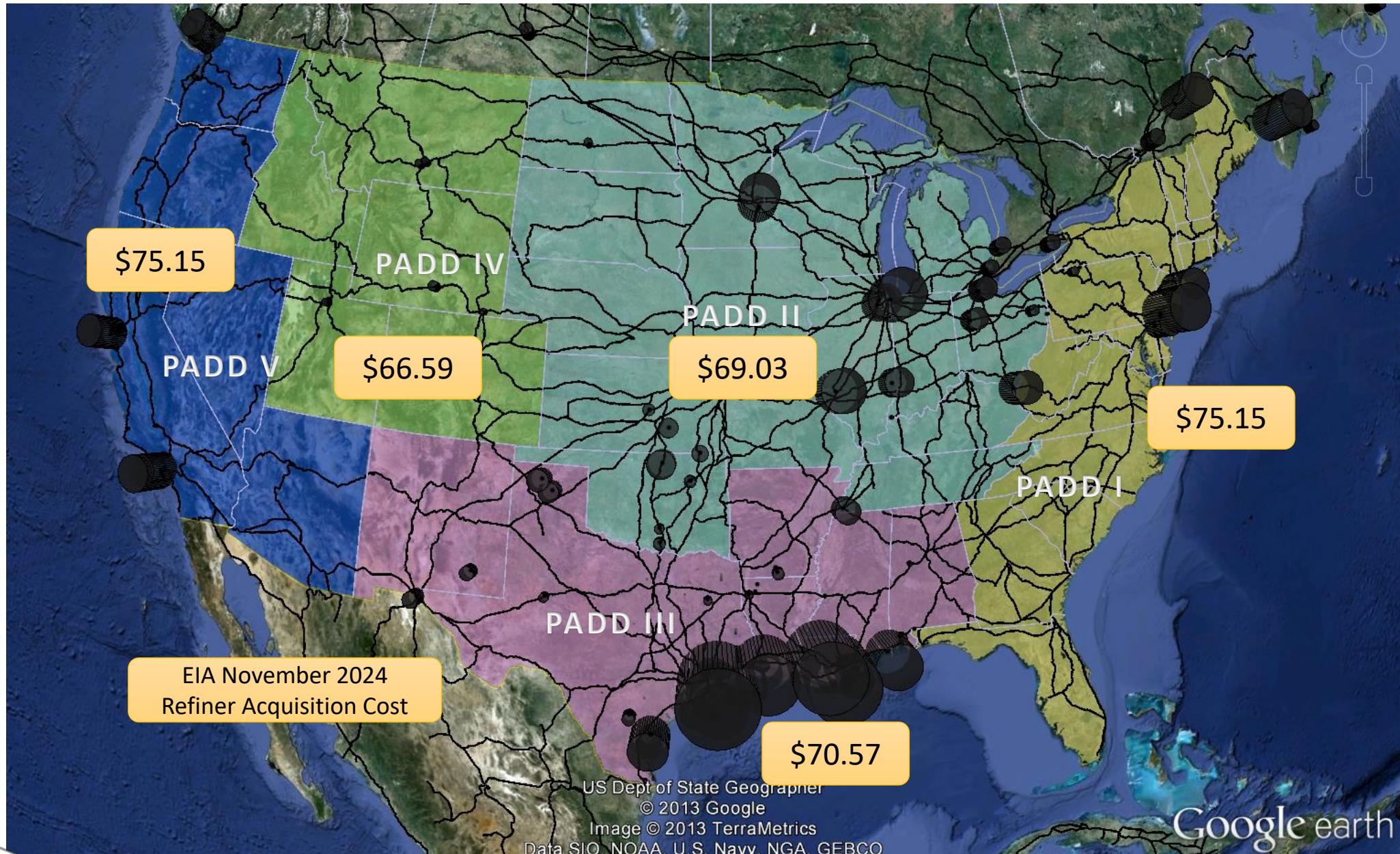
Estimated ND Rail Export Volumes



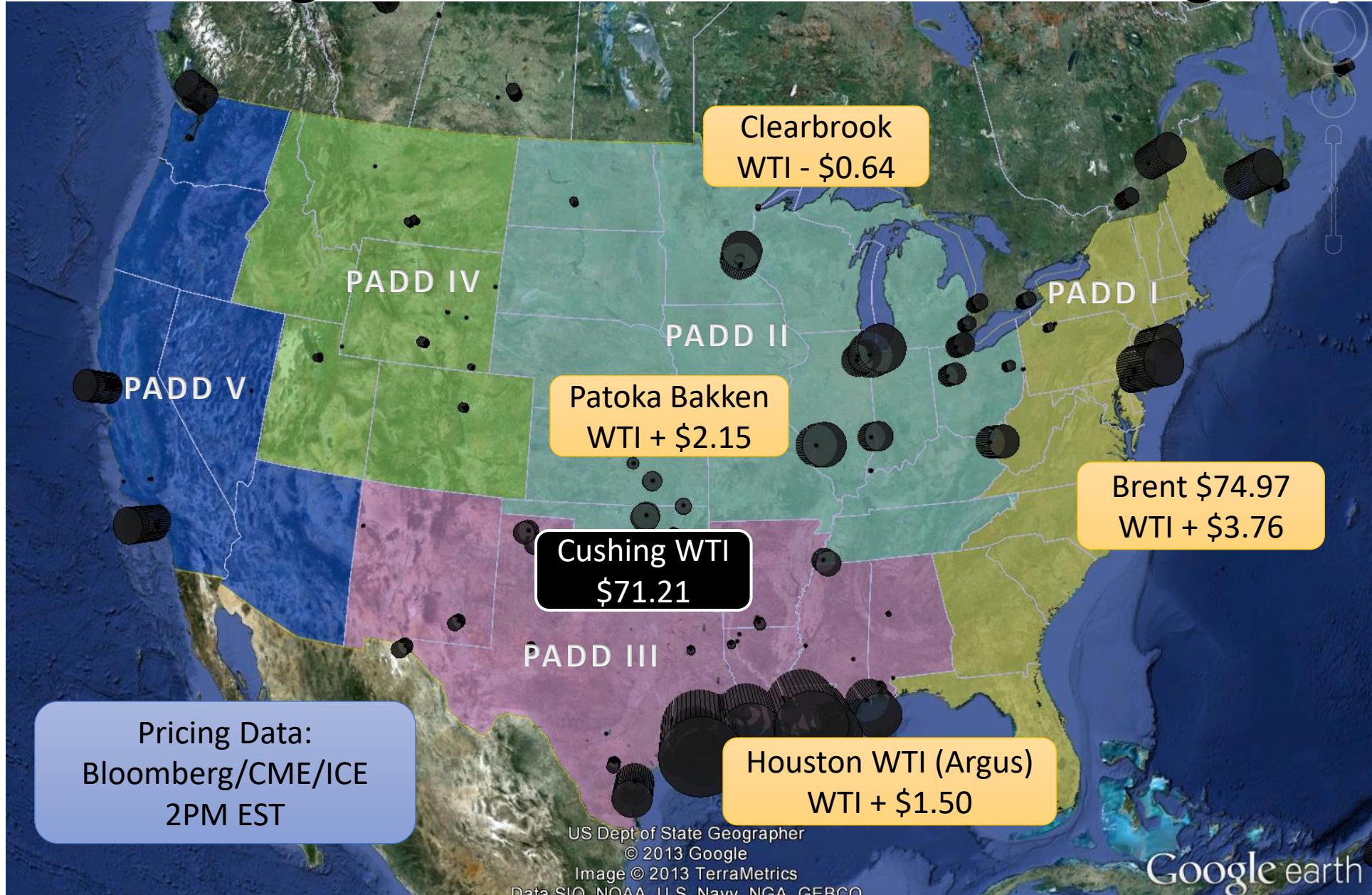
Rail Destinations Market Share (Nov. 2024)



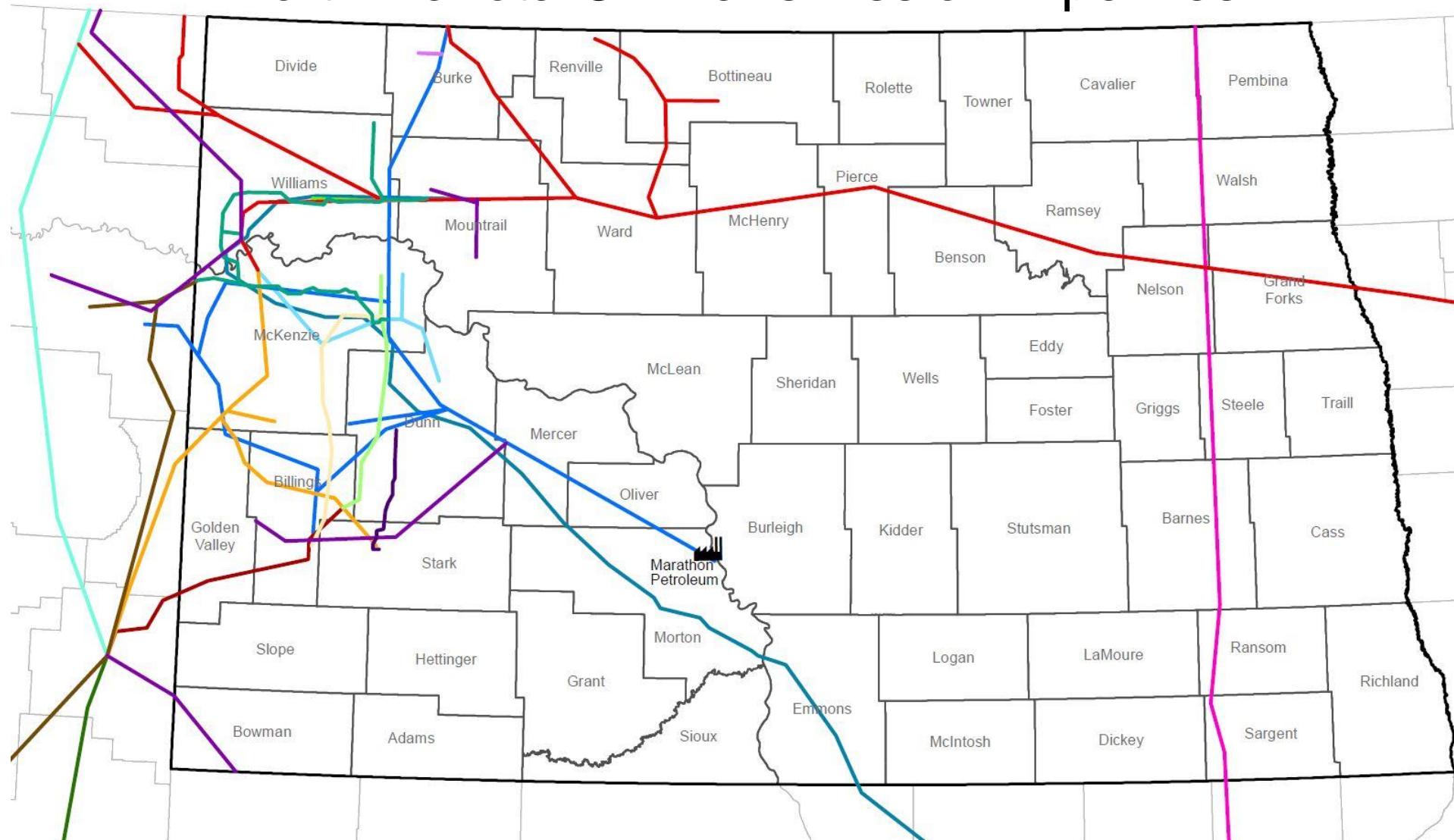
Major Rail Lines and Refineries



Major Pricing Benchmarks & Refining Centers



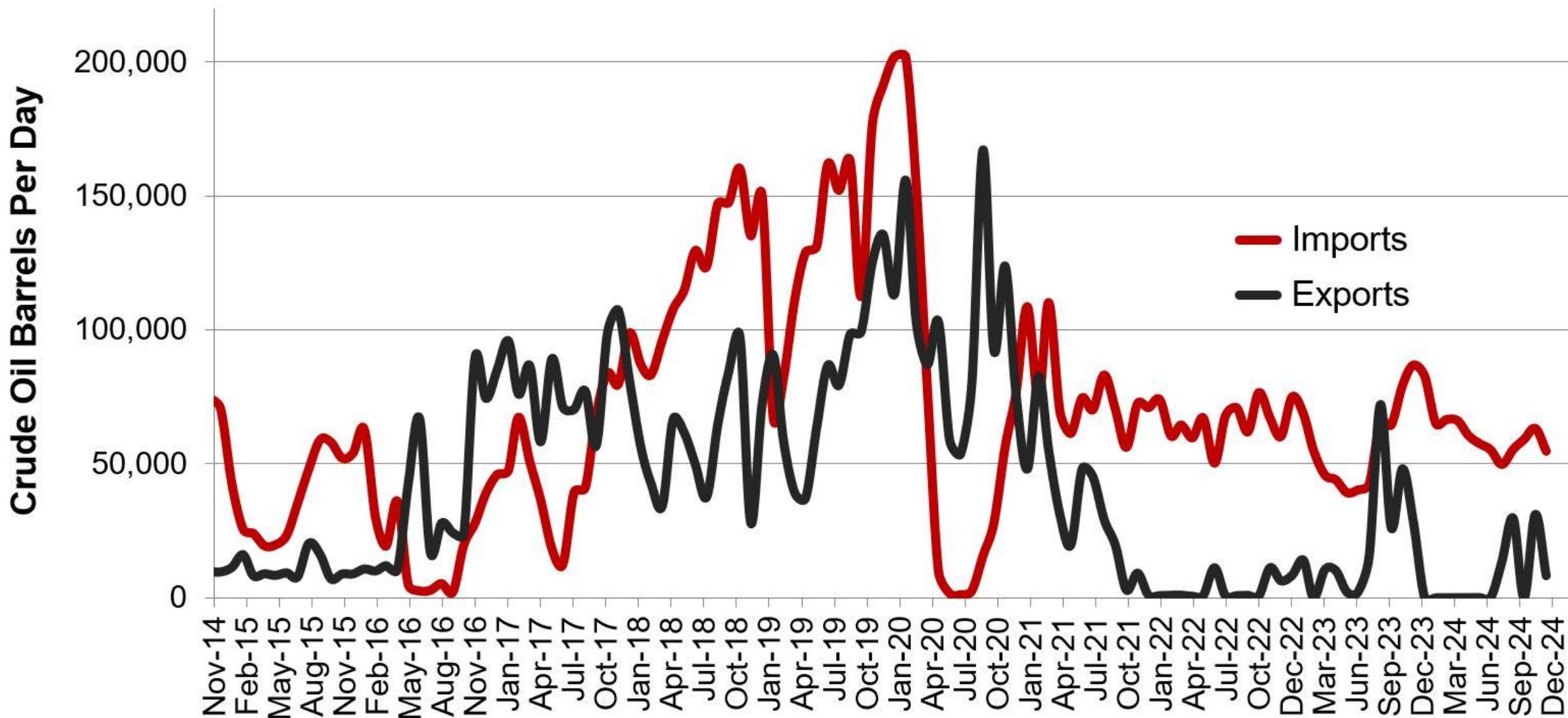
North Dakota Oil Transmission Pipelines



- Refinery
- Basin Transload
- Butte
- Double H
- Hiland
- Bridger
- Bakken Oil Express
- Belle Fourche
- Crestwood
- Enbridge
- Keystone Pipeline
- Targa
- BakkenLink
- Bridger
- Dakota Access
- Four Bears
- Little Missouri
- Marathon



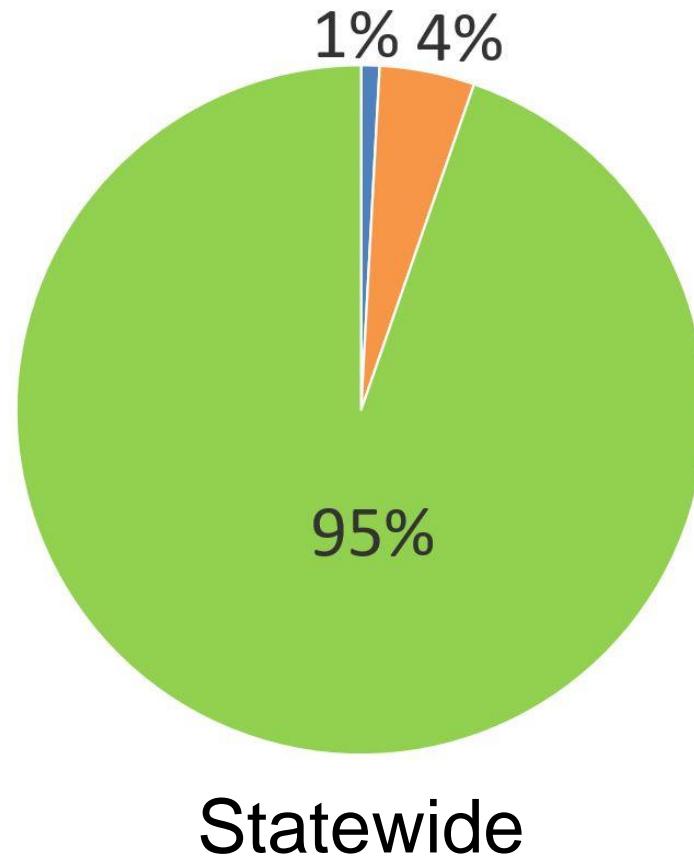
Williston Basin Truck/Rail Imports and Exports with Canada



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



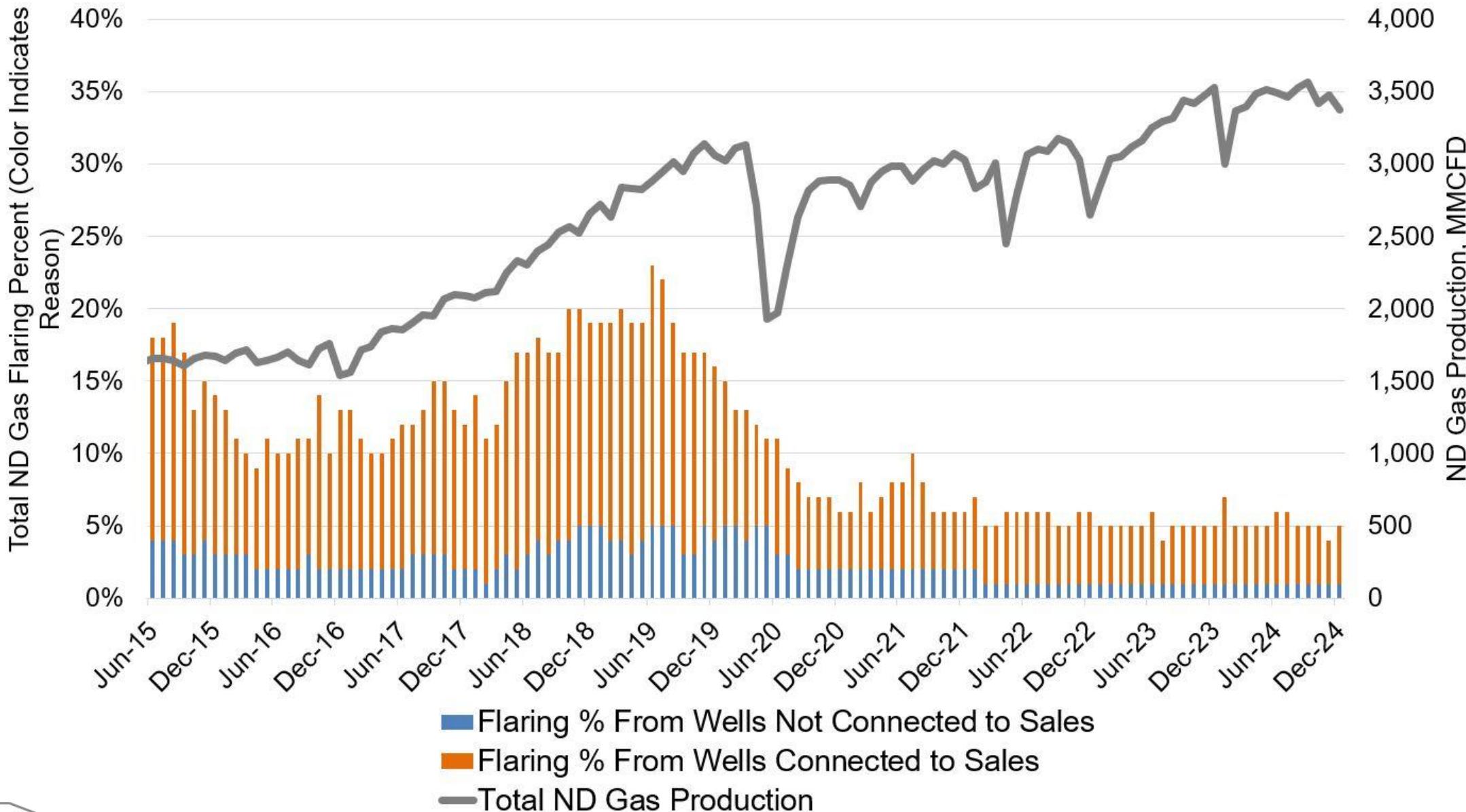
GREEN – % of gas captured and sold
Blue – % flared from zero sales wells
Orange – % flared from wells with at least one mcf sold.

Simple Terms

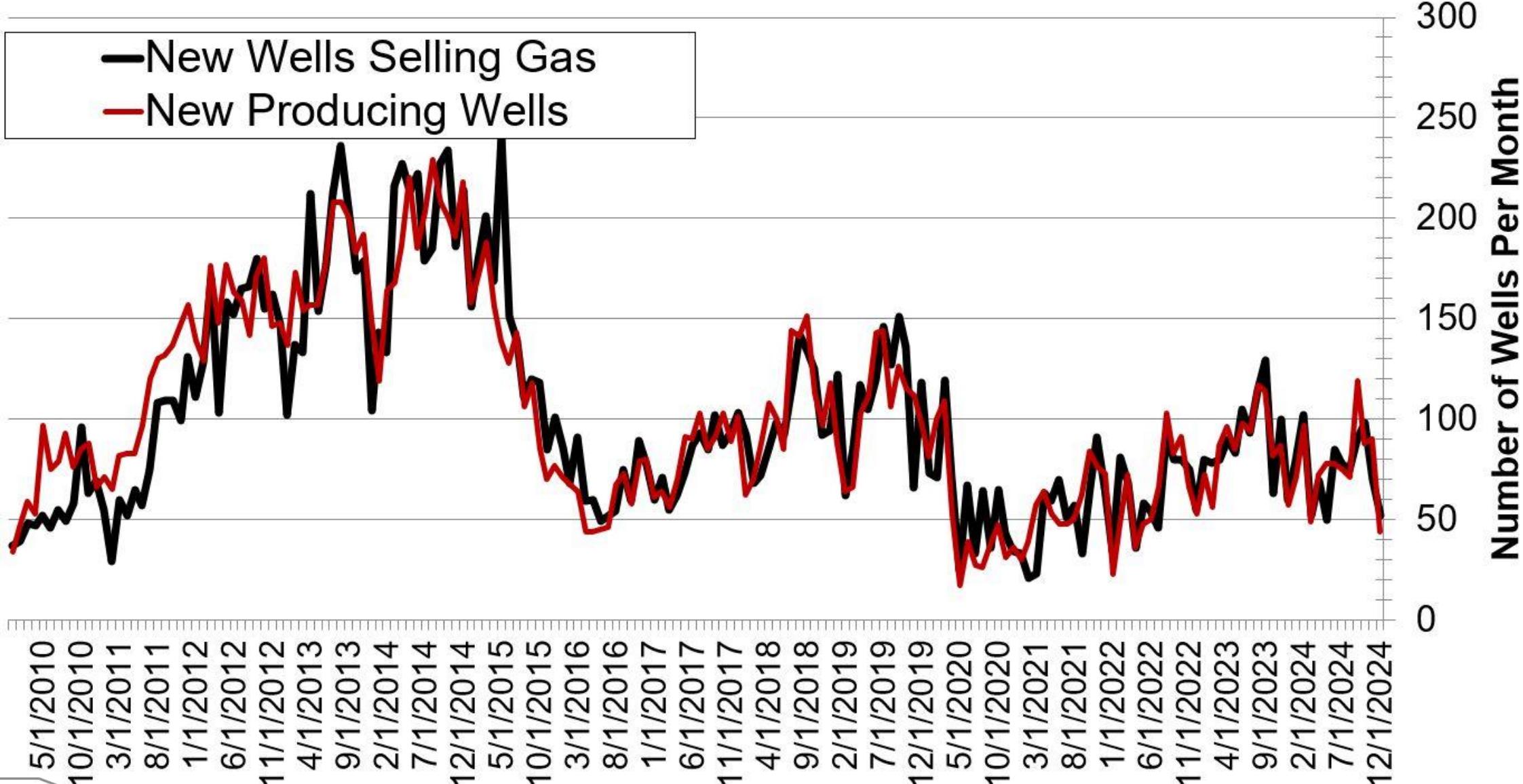
Blue – Lack of pipelines
Orange – Challenges on existing infrastructure

Dec. 2024 Data – Non-Confidential Wells

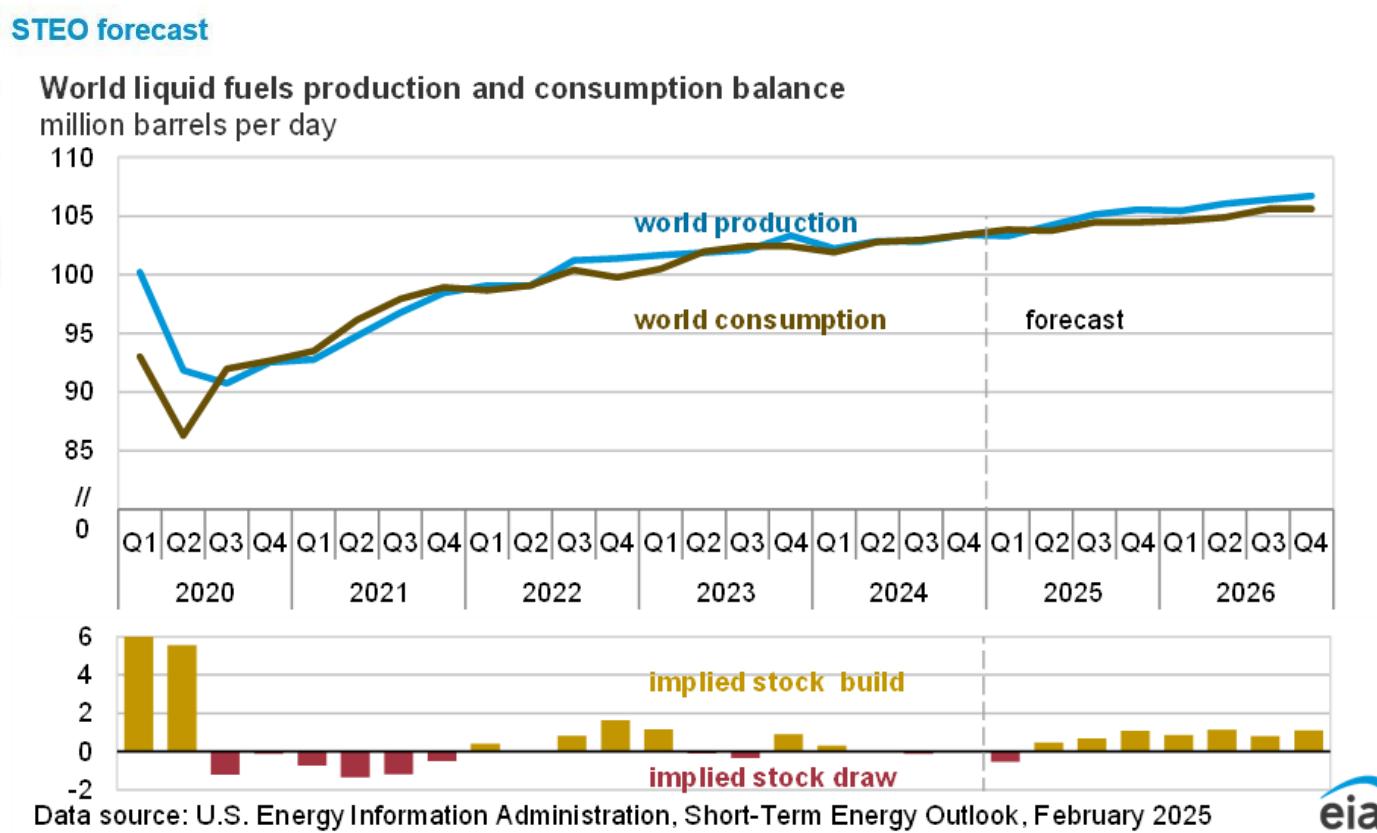
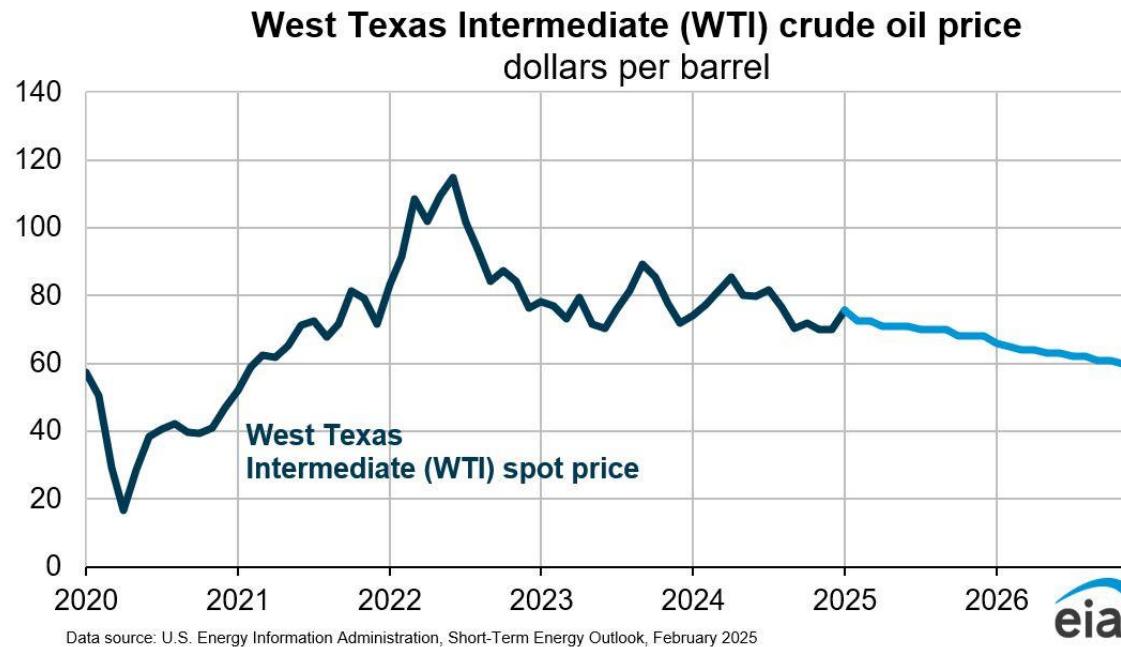
Solving the Flaring Challenge



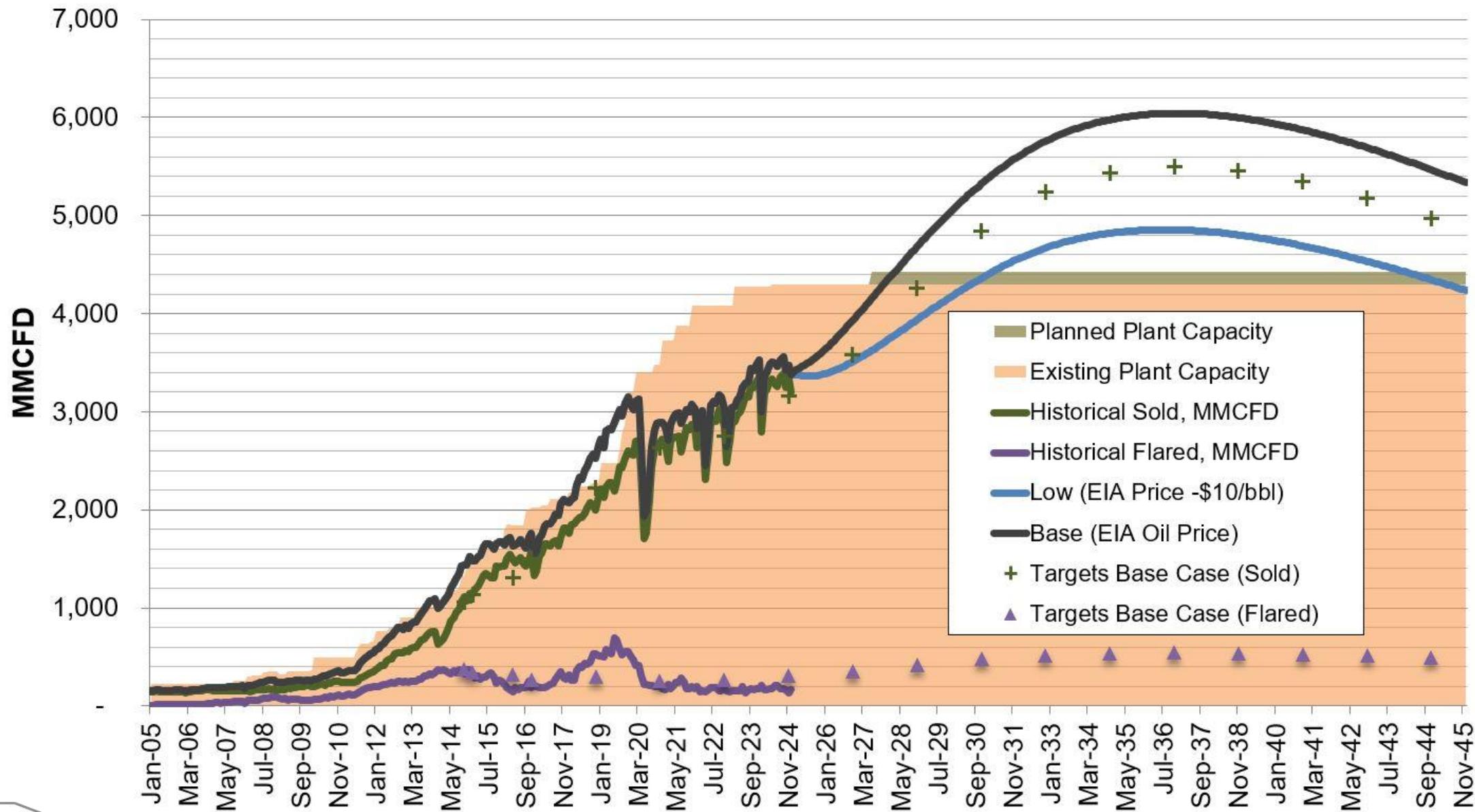
Solving the Flaring Challenge



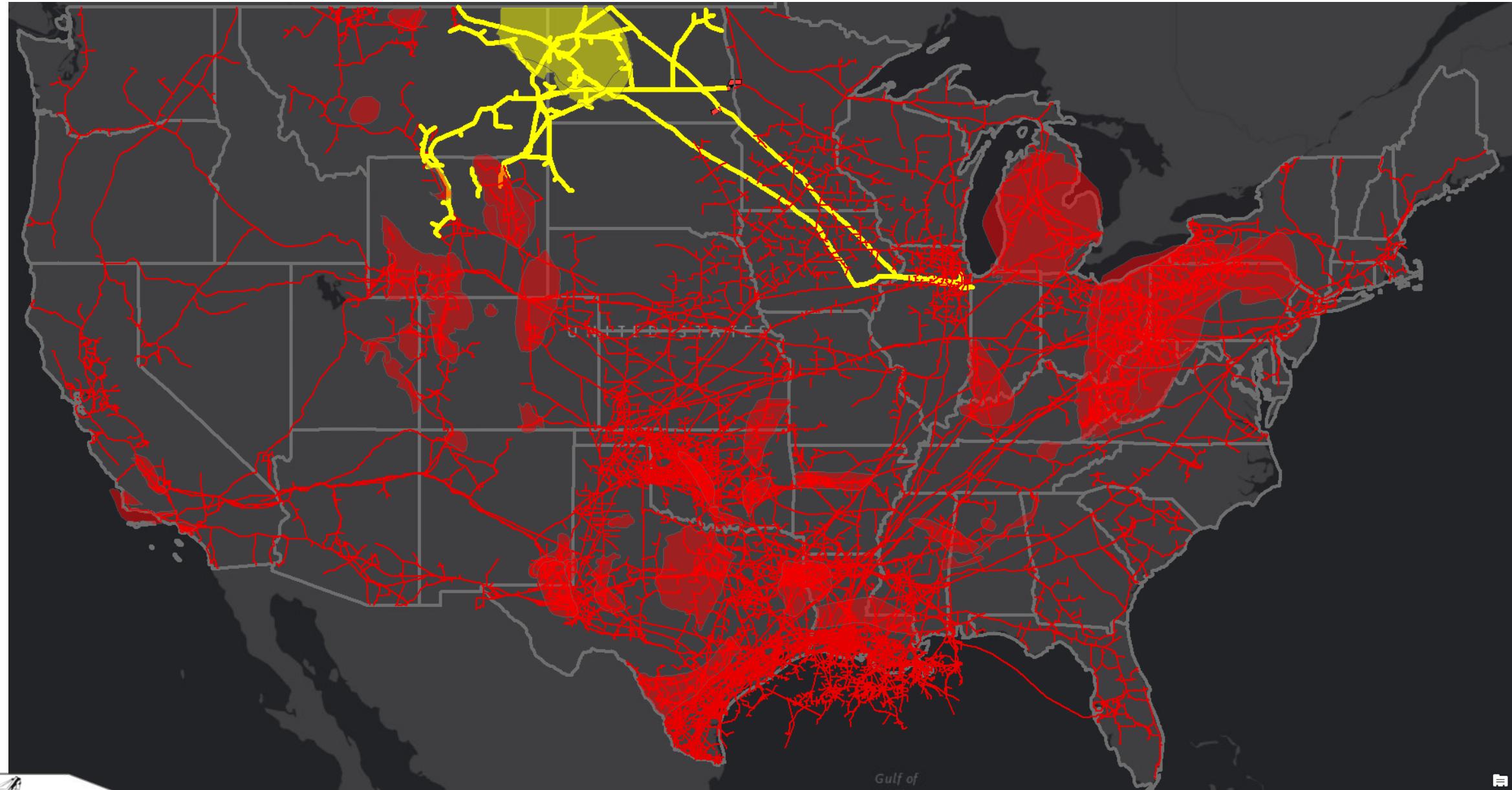
EIA Oil Price Outlook (February 2025)



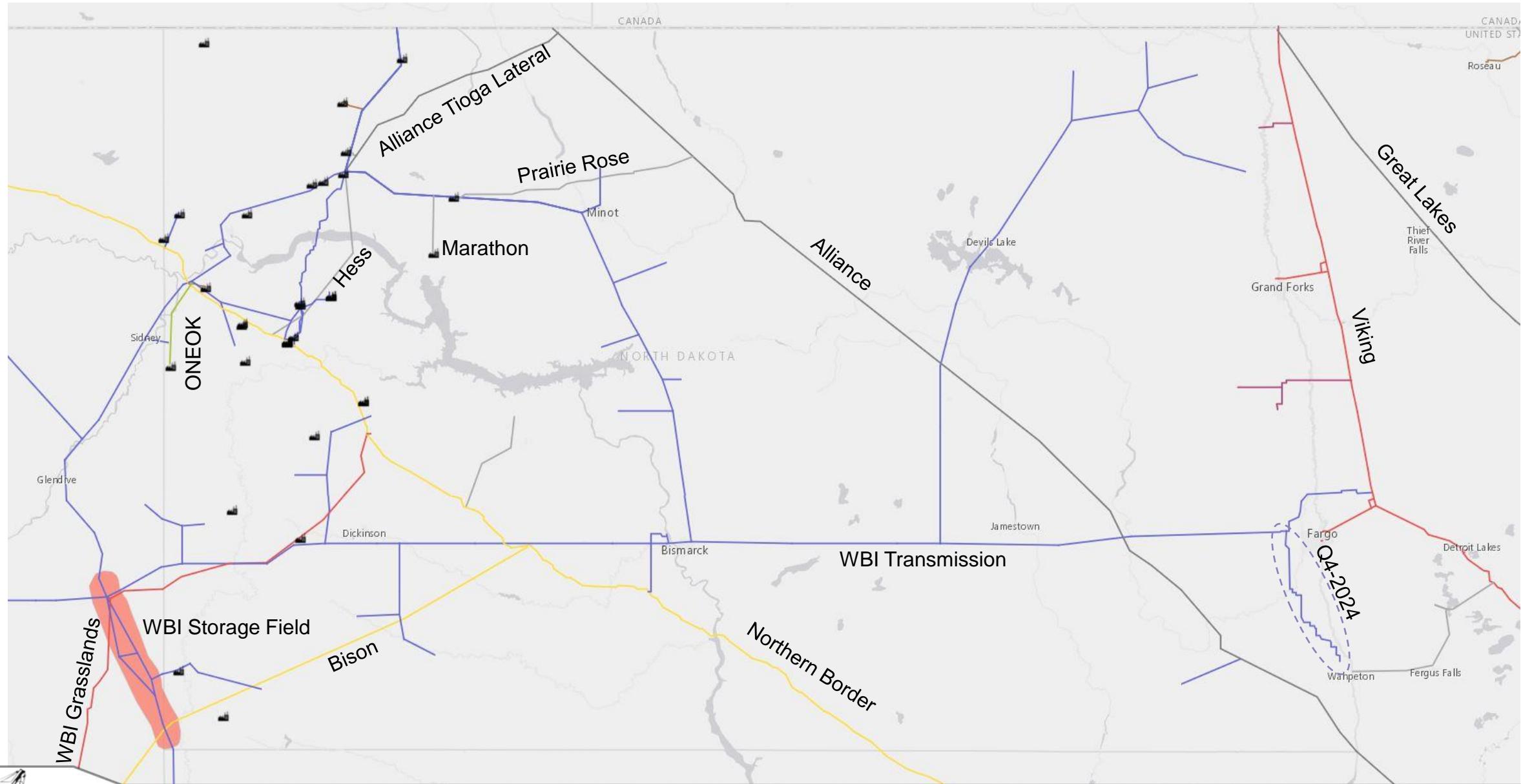
North Dakota Gas Processing Outlook



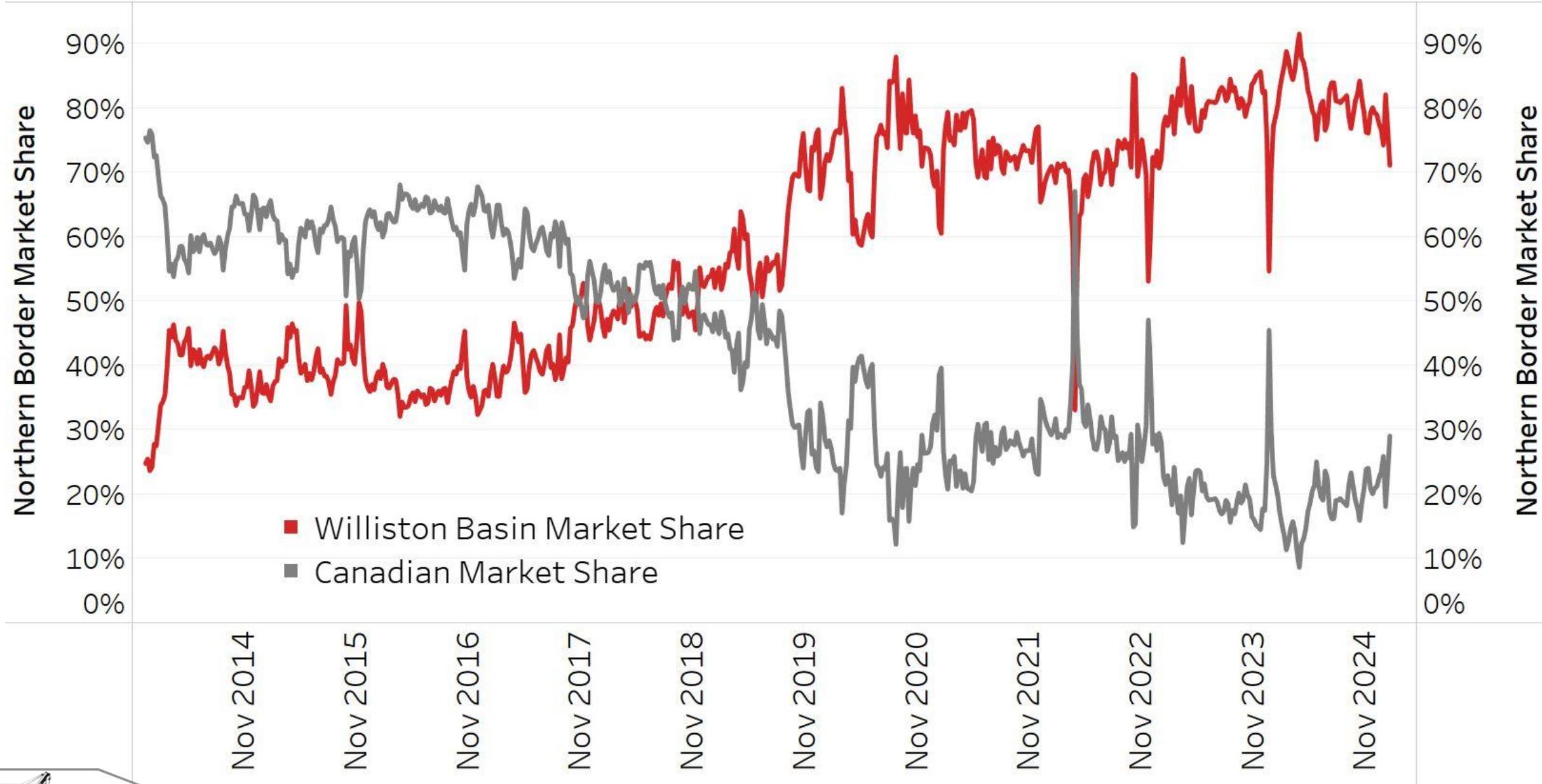
Bakken Natural Gas Infrastructure



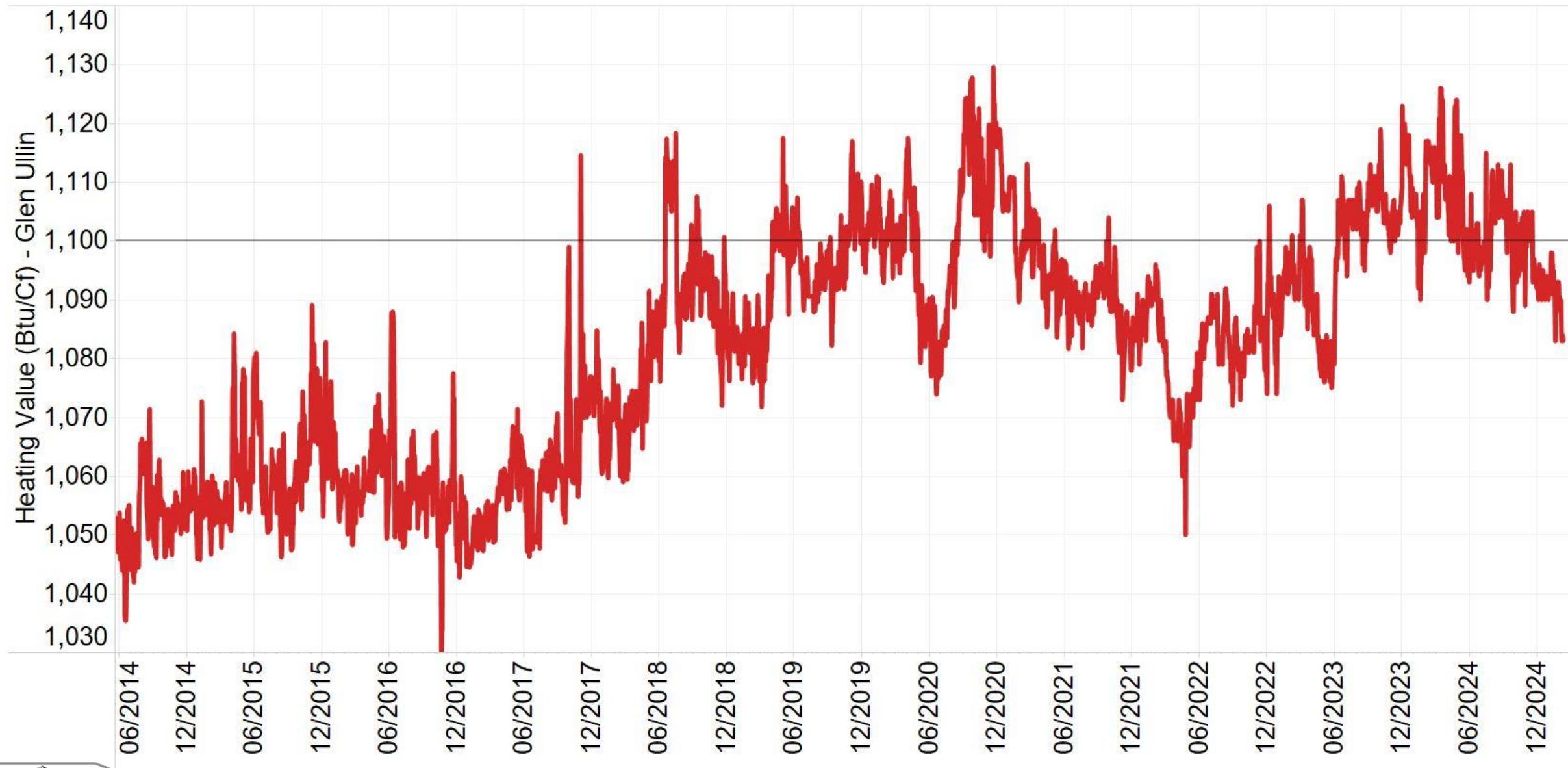
Major Residue Gas Pipeline Infrastructure



Northern Border Pipeline Market Share



Northern Border BTU at Glen Ullin, ND



WBI Energy: Proposed Bakken East Project



Natural Gas Pipeline Project Highlights

- Non-binding open season Dec 16 – Jan 31, 2025
- 375 Miles: 30" & 24" Pipe
- Proposed Capacity 760,000 Dth/Day
- Phase 1 (West) : Nov 2028 targeted in-service
- Phase 1 (East) : Nov 2029 targeted in-service
- Seeking commitments 20yrs or Longer

Estimated Rates

- \$0.85 to \$0.90/Dth + Fuel/Electric/Commodity
- Anchor Shipper Minimum: 100,000 Dth/Day
- Foundation Shipper Minimum: 250,000 Dth/Day

Intensity Infrastructure Partners Proposed Pipeline



Natural Gas Pipeline Project Highlights

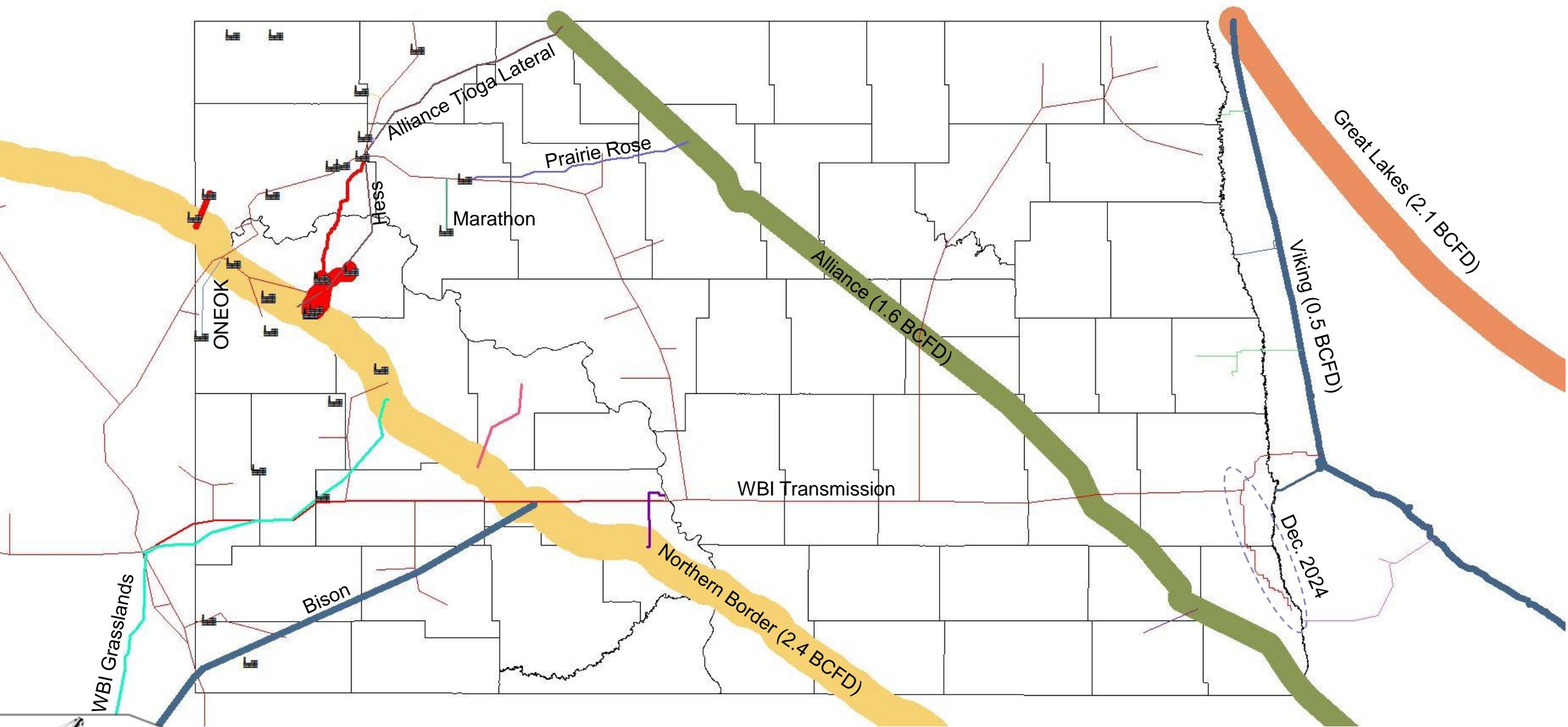
- Non-binding open season Feb 3 – Mar 7, 2025
- 136 Miles: 42" Pipe
- Proposed Capacity 1,500,000 Dth/Day
- January 2028 targeted in-service
- Seeking commitments 20yrs or Longer

Estimated Rates

- \$0.50/Dth + Fuel/Electric/Commodity
- Anchor Shipper Minimum: 100,000 Dth/Day
- Foundation Shipper Minimum: 250,000 Dth/Day



Residue Gas Pipeline Capacity Visualization



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