

# Pipeline Authority Monthly Update

**Justin J. Kringstad**

*Geological Engineer*

*Director*

*North Dakota Pipeline Authority*

February 13, 2025

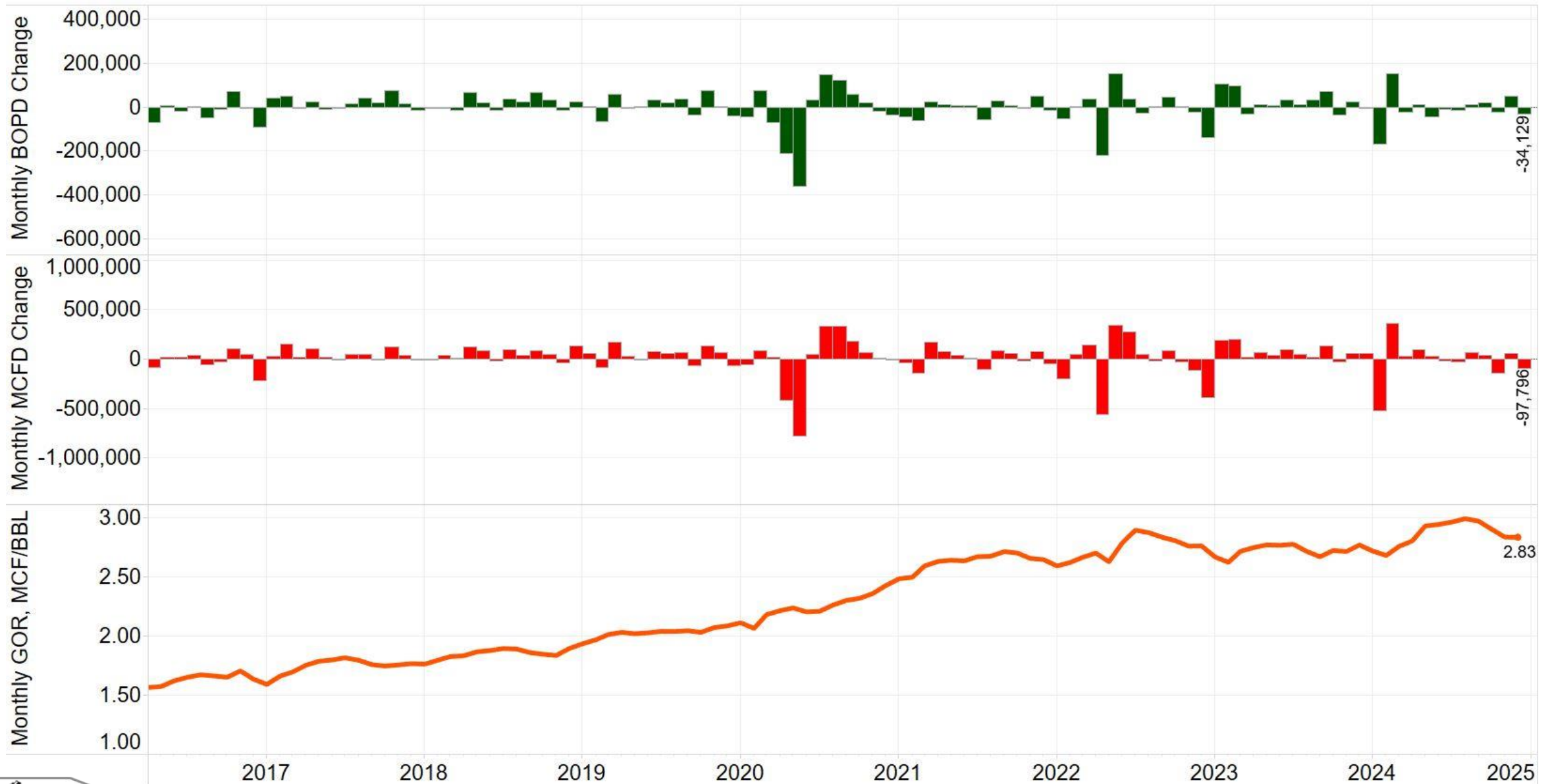


# US Williston Basin Oil Production - 2024

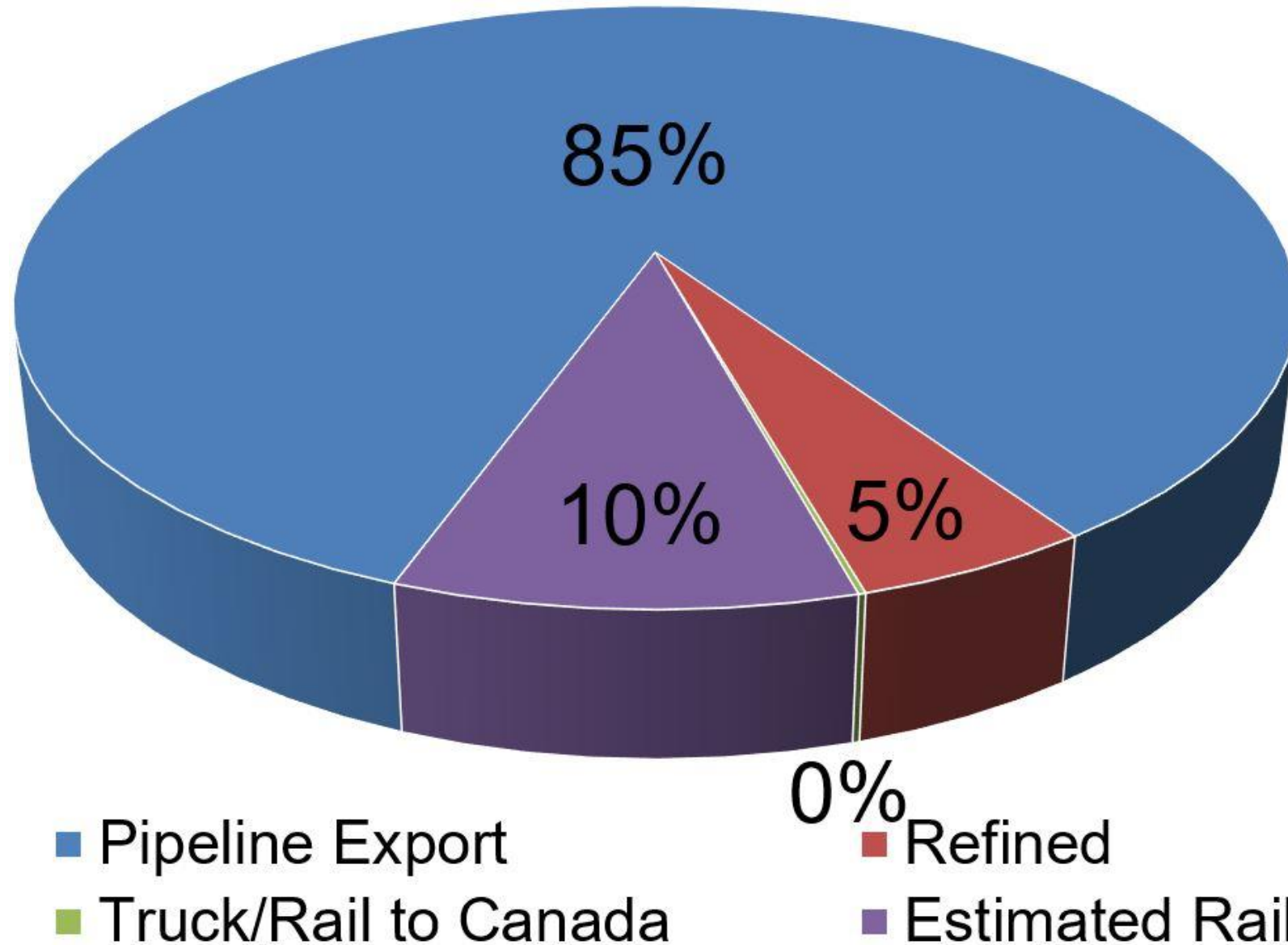
MONTH	ND	Eastern MT*	SD	TOTAL
January	1,105,214	59,255	2,312	1,166,780
February	1,256,126	66,329	2,412	1,324,867
March	1,231,476	70,662	2,590	1,304,728
April	1,243,018	72,265	2,430	1,317,713
May	1,198,810	72,539	2,349	1,273,698
June	1,186,415	71,550	2,370	1,260,335
July	1,169,476	69,319	2,329	1,241,124
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

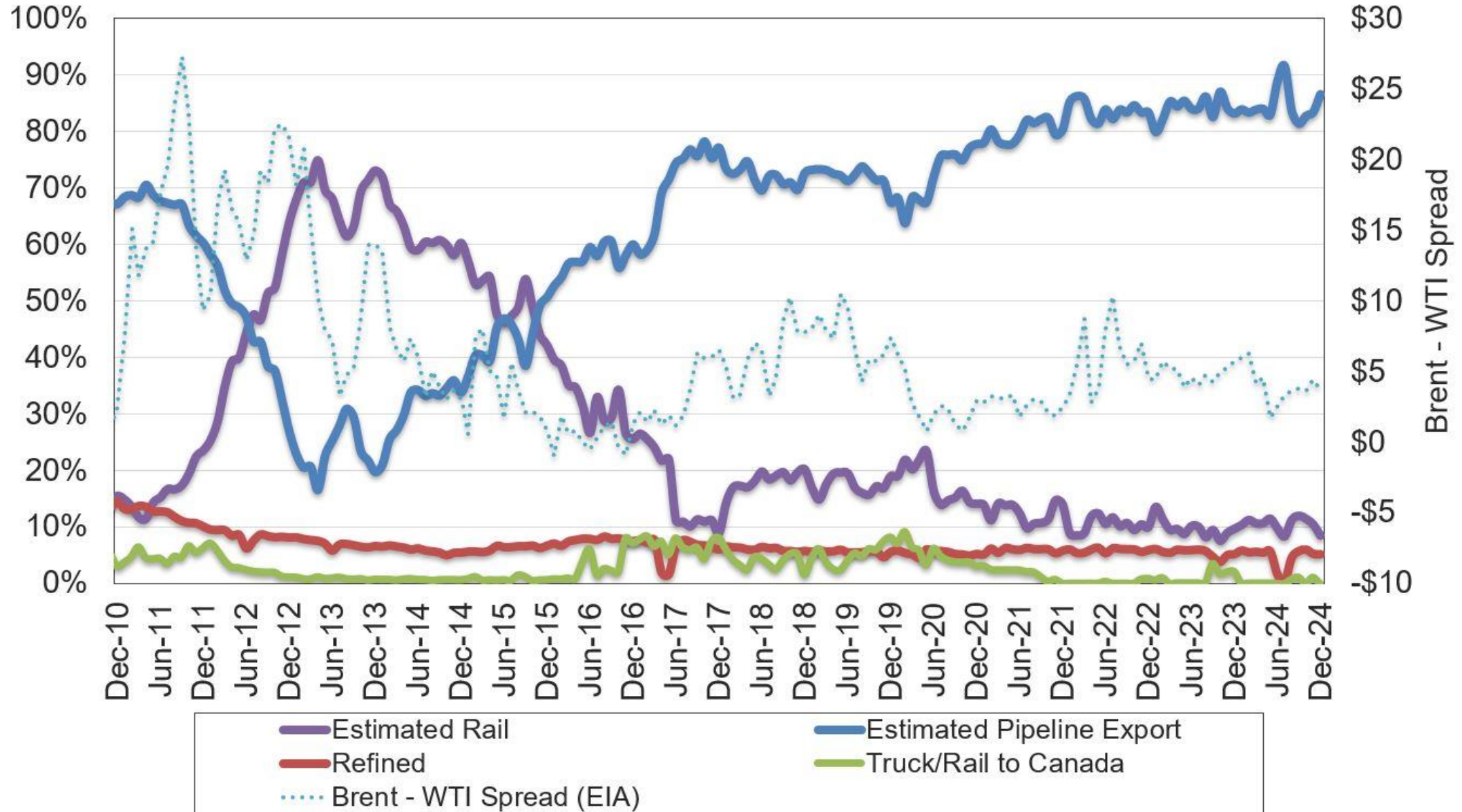


# Estimated Williston Basin Oil Transportation

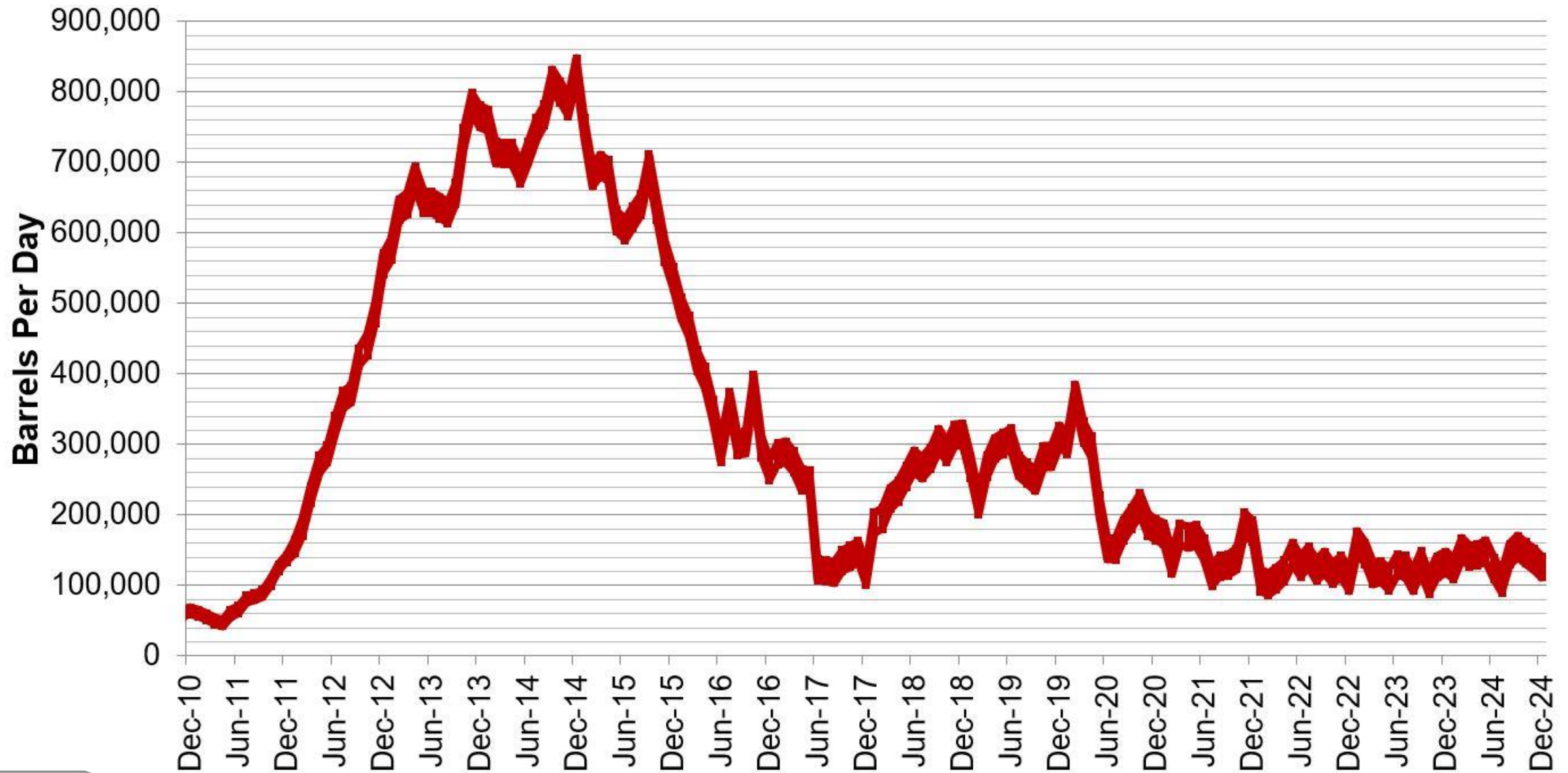




# Estimated Williston Basin Oil Transportation

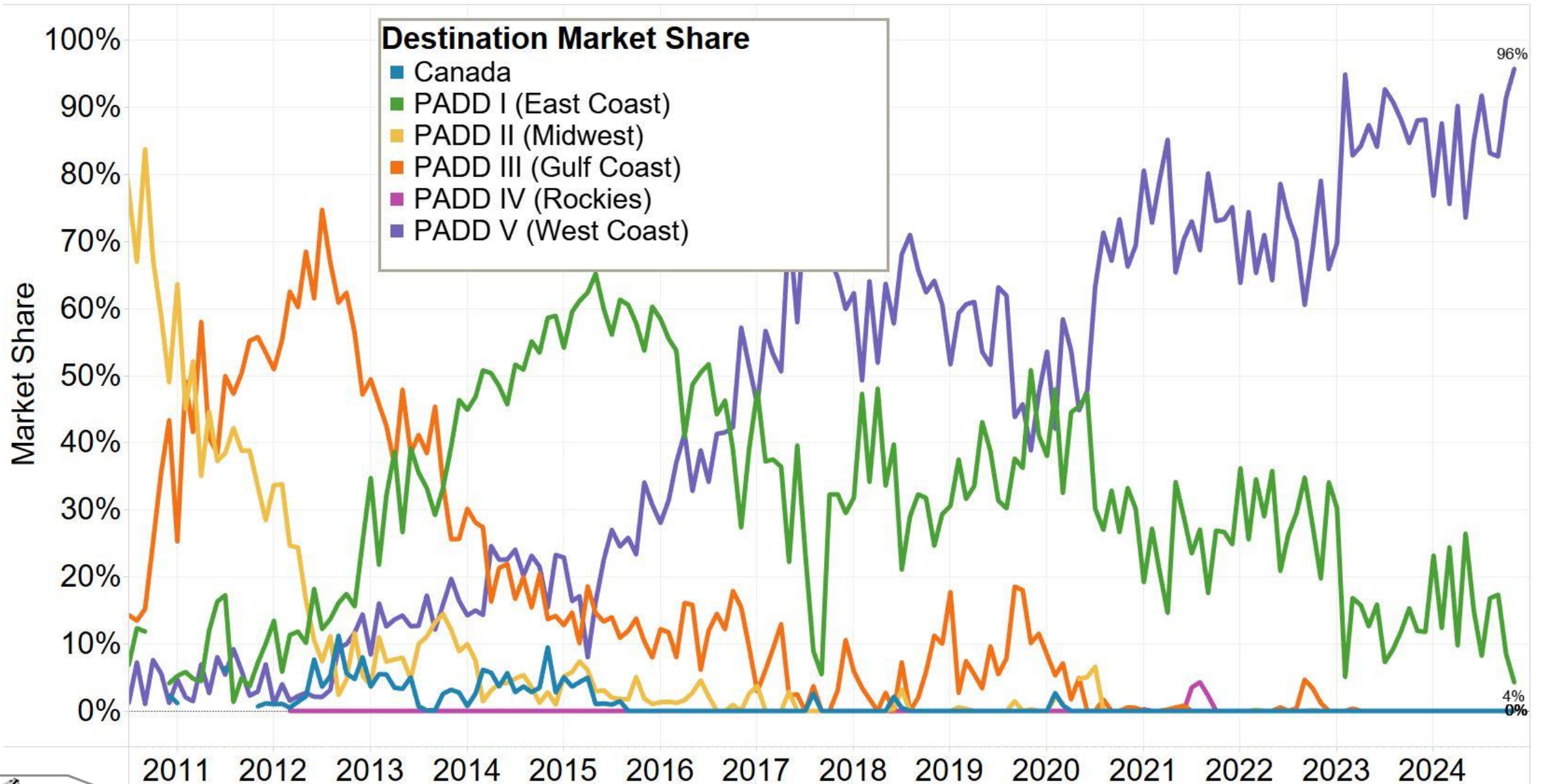


# Estimated ND Rail Export Volumes



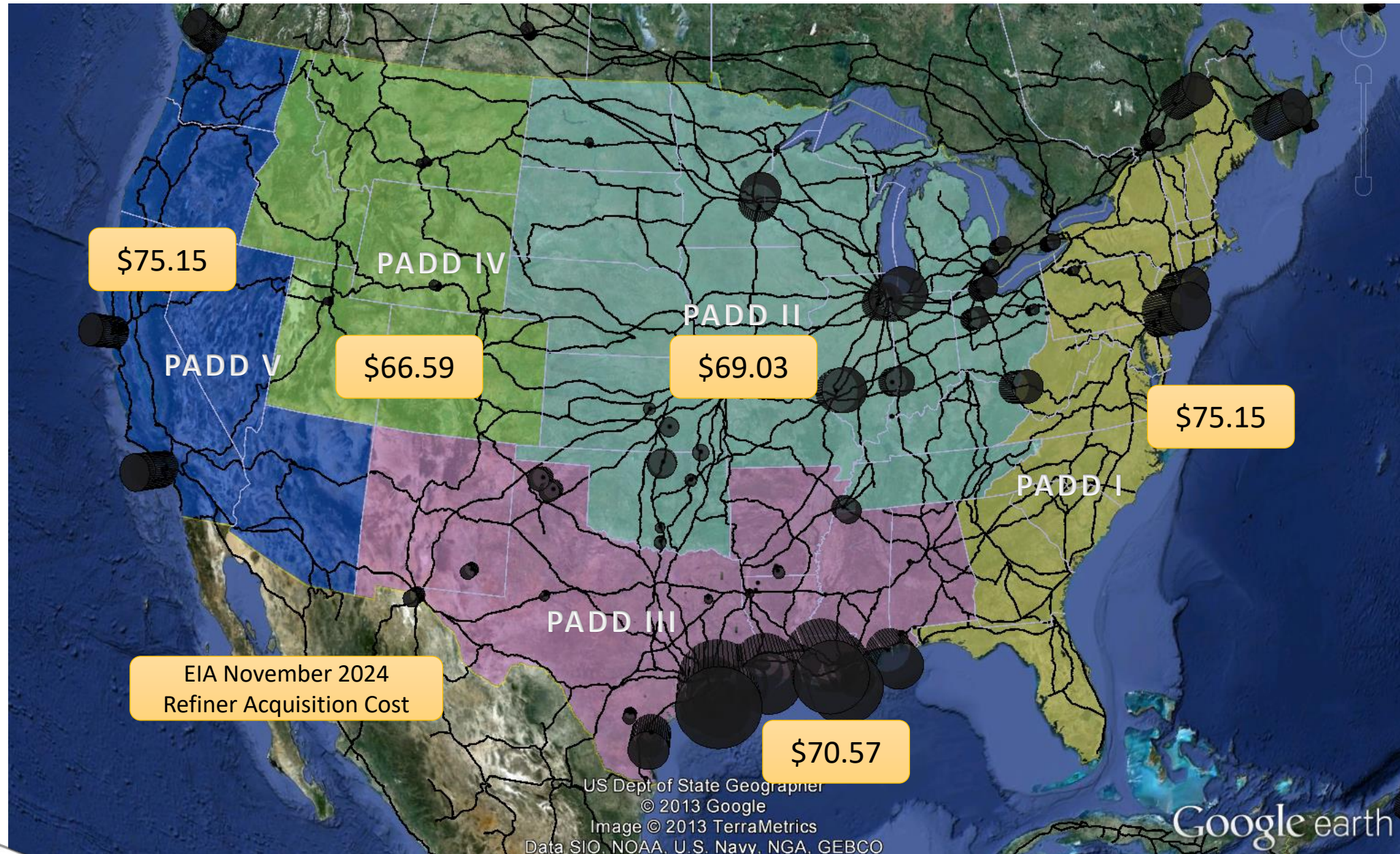


# Rail Destinations Market Share (Nov. 2024)



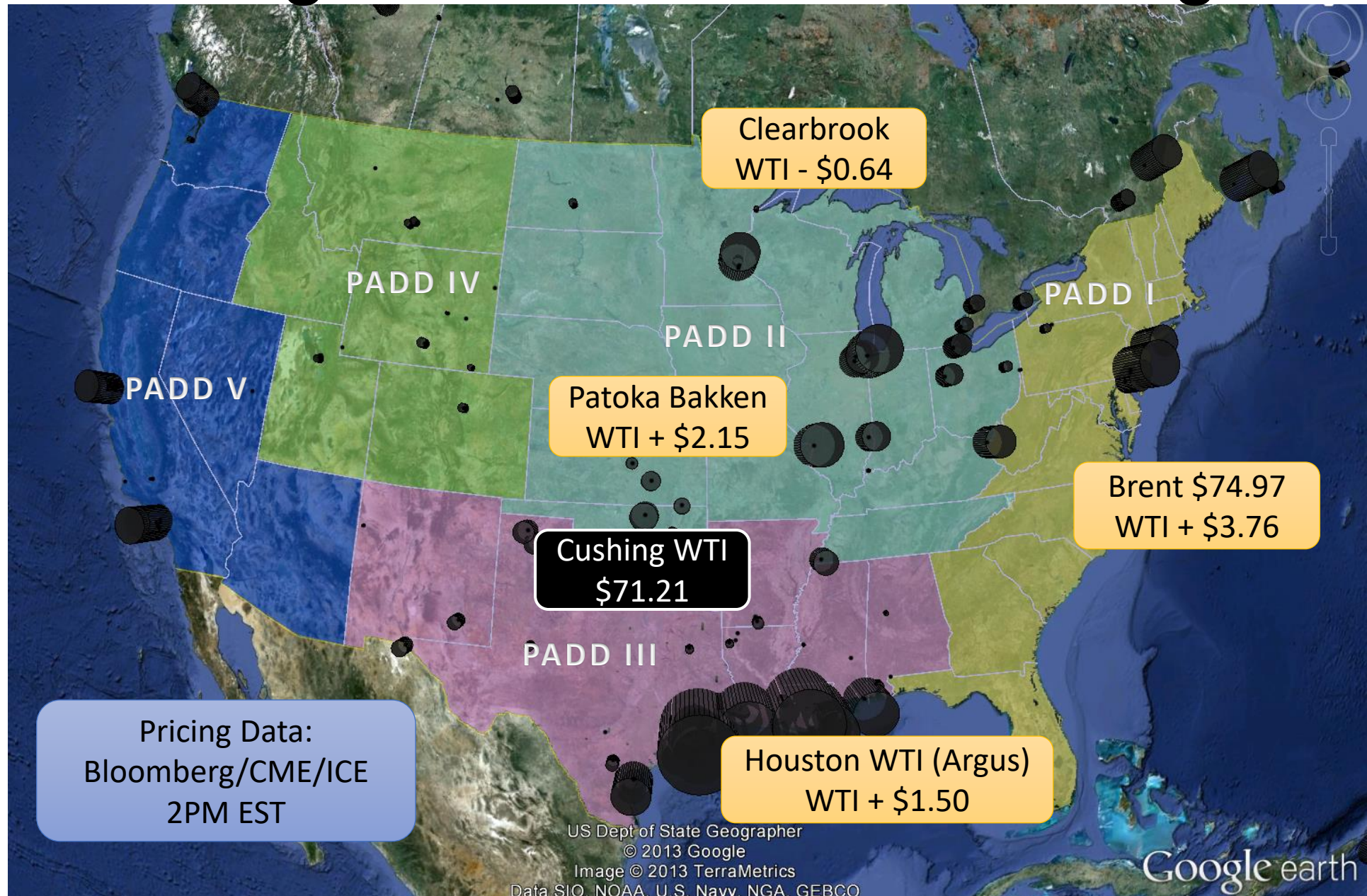


# Major Rail Lines and Refineries



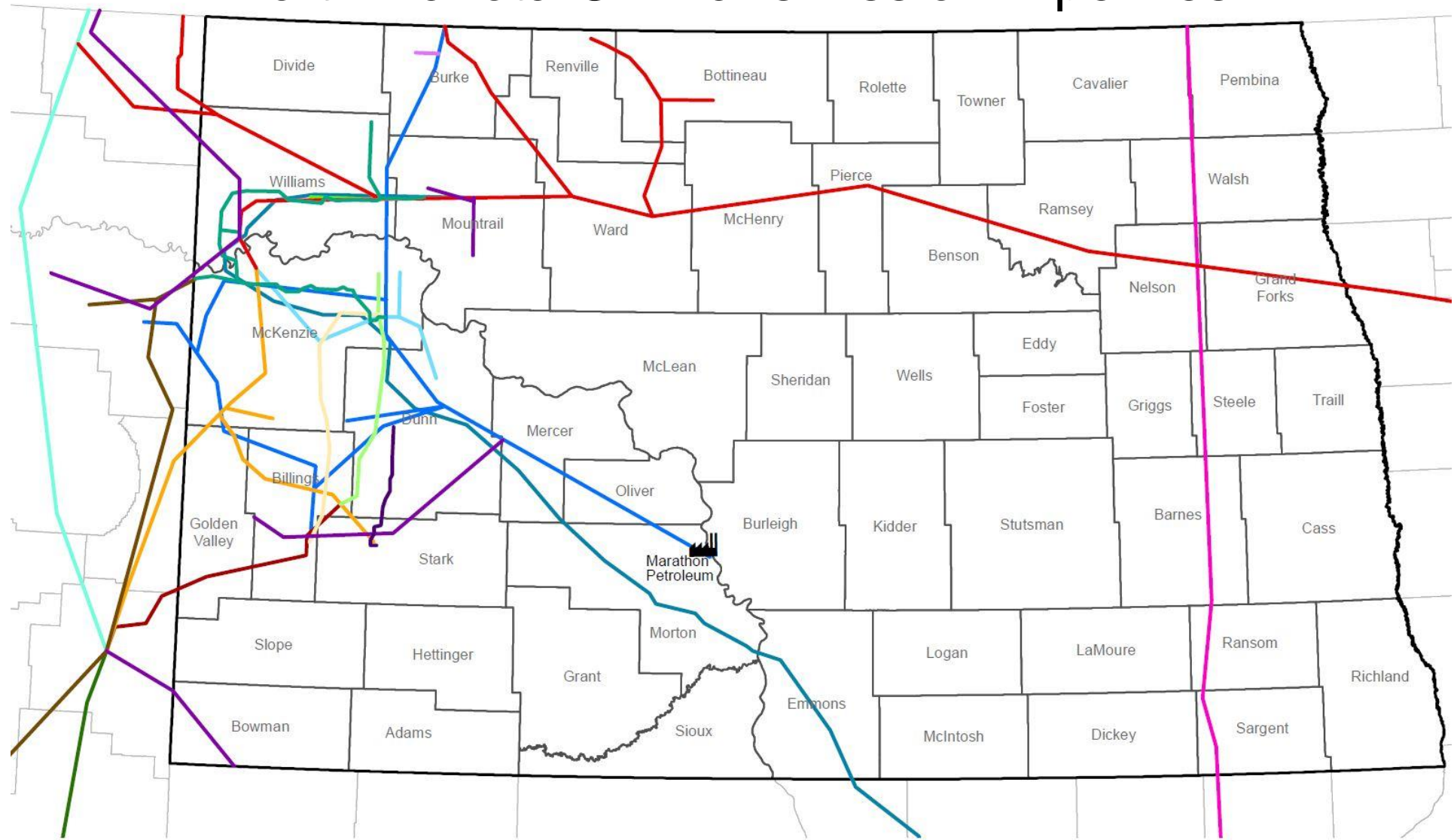


# Major Pricing Benchmarks & Refining Centers





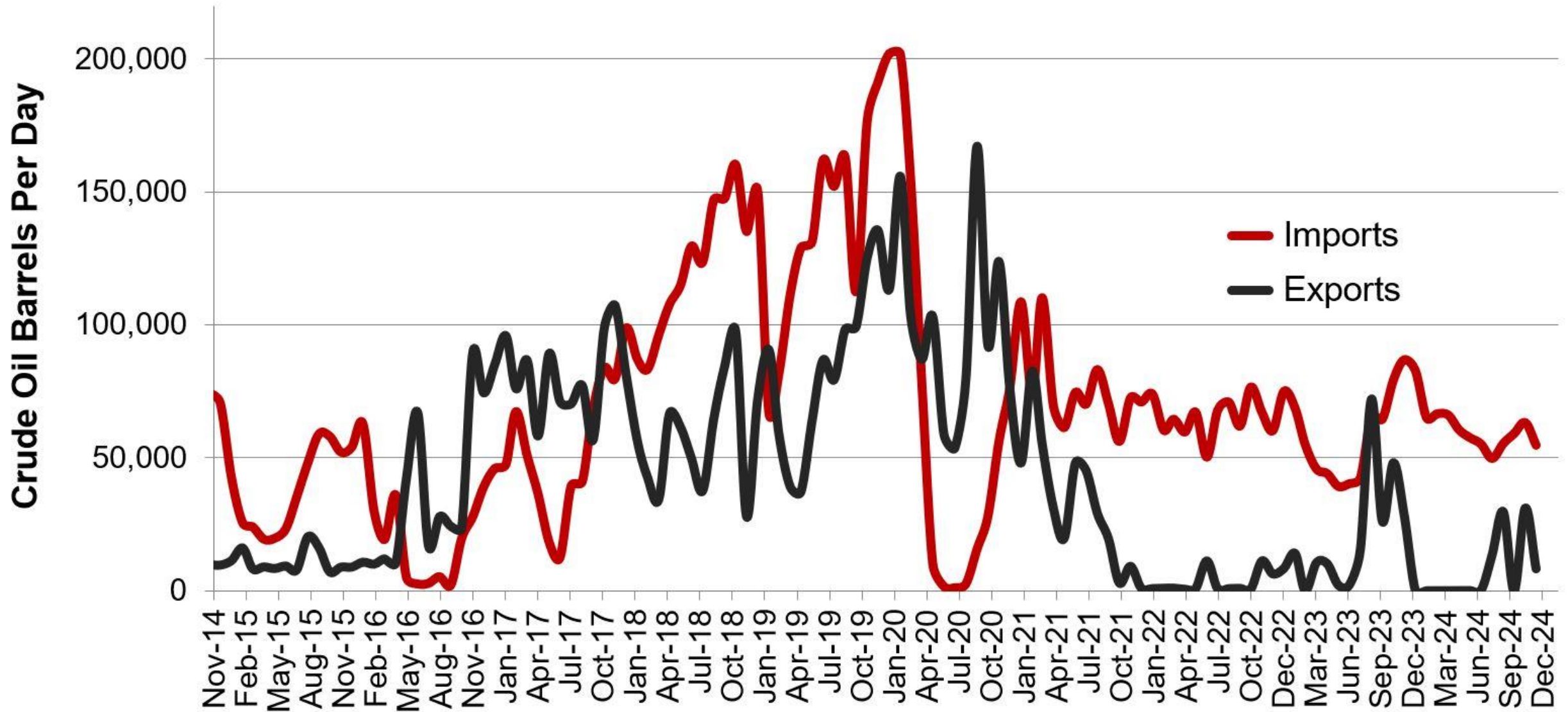
# North Dakota Oil Transmission Pipelines



- |                    |                 |               |            |                   |          |
|--------------------|-----------------|---------------|------------|-------------------|----------|
| 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

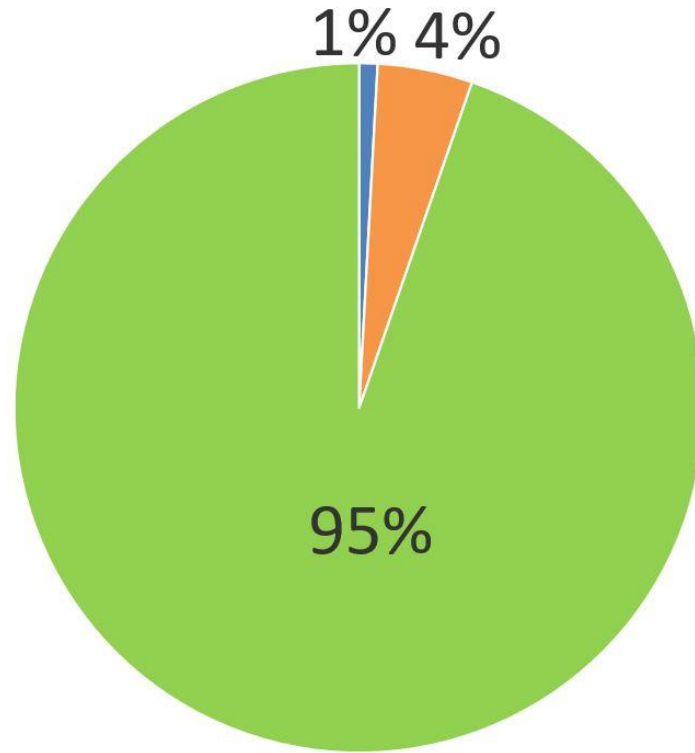


Data for imports/exports chart is provided by the US International Trade Commission and represents traffic across US/Canada border in the Williston Basin area.





# Solving the Flaring Challenge



Statewide

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

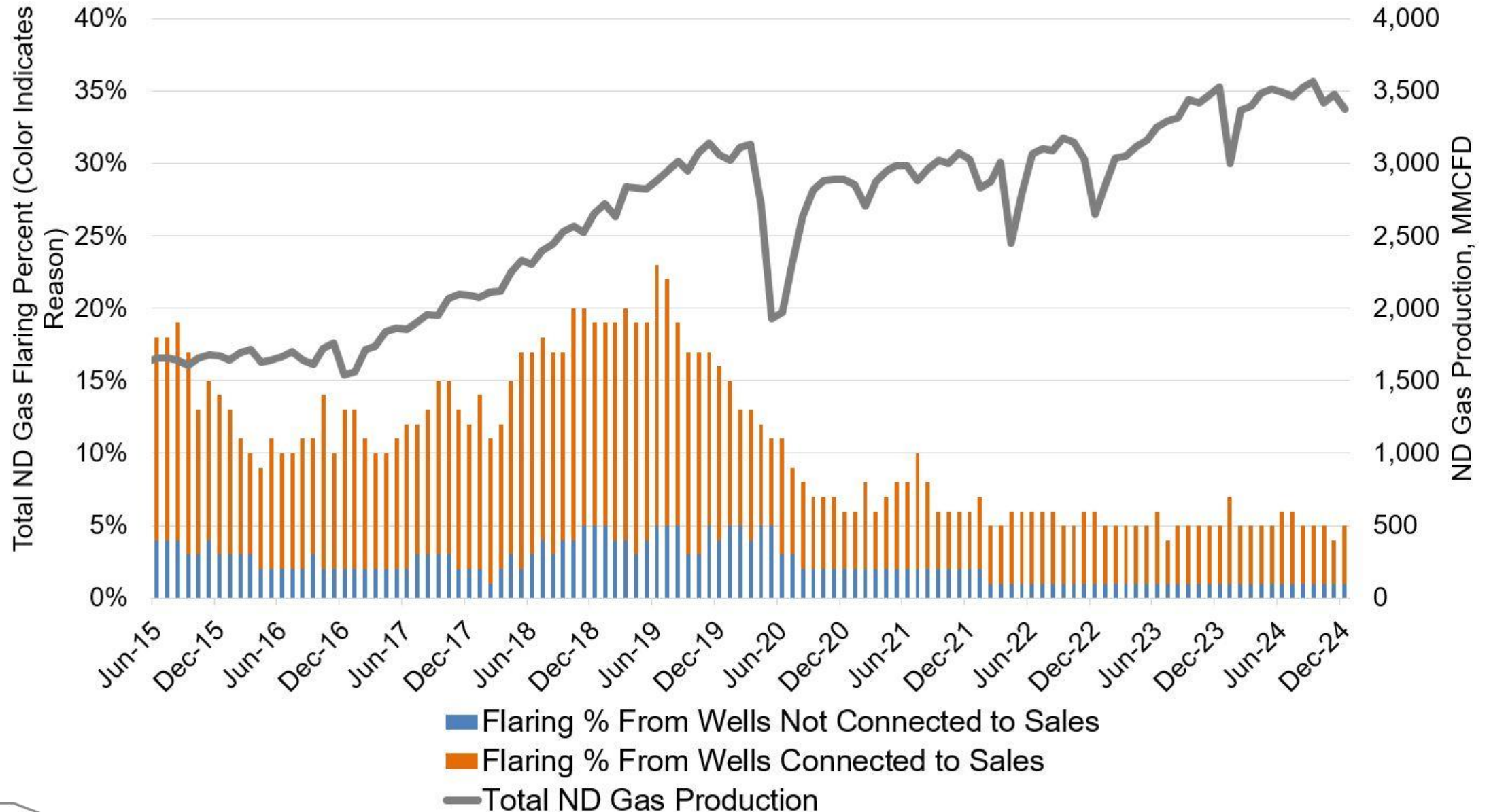
## Simple Terms

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

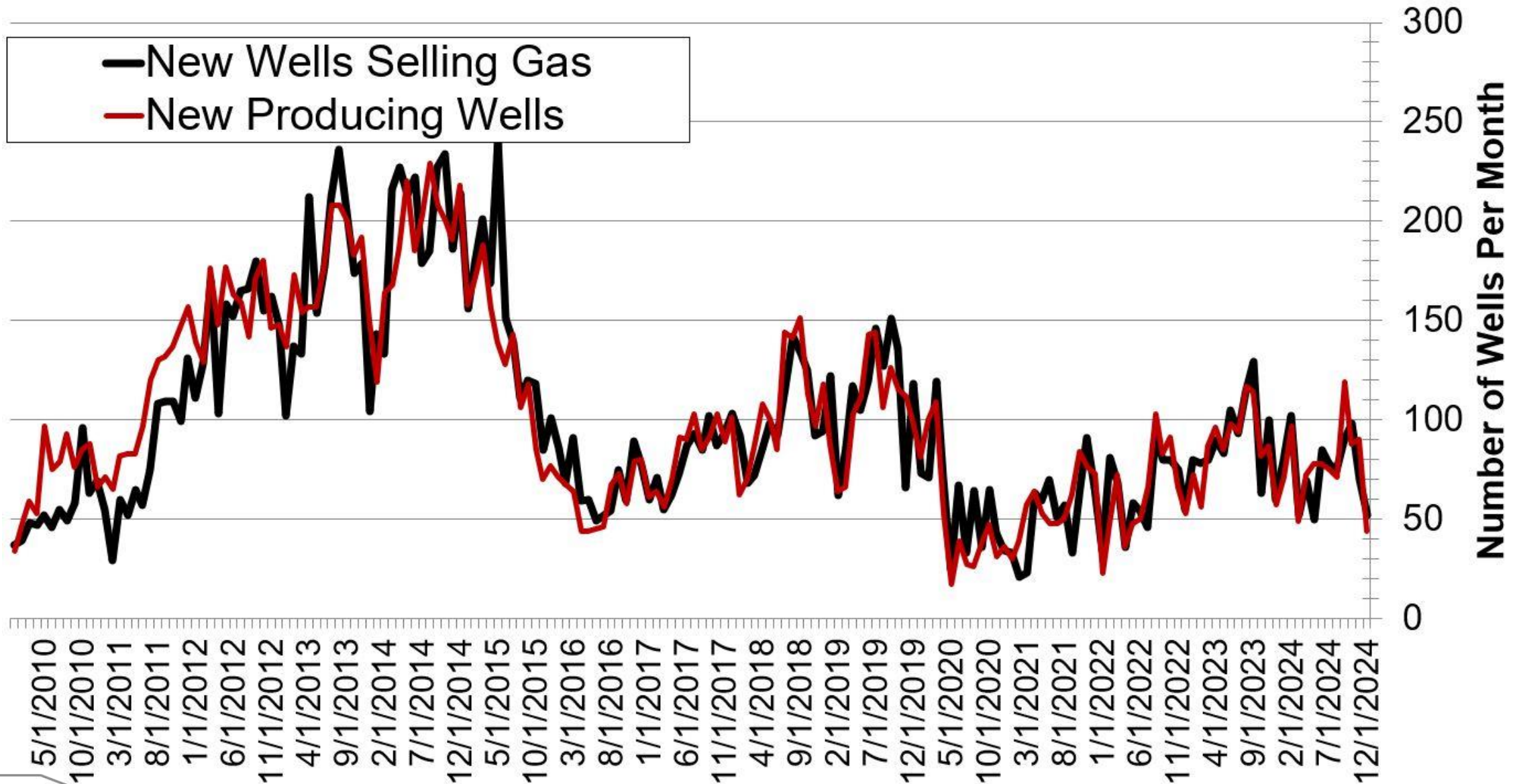
Dec. 2024 Data – Non-Confidential Wells



# Solving the Flaring Challenge



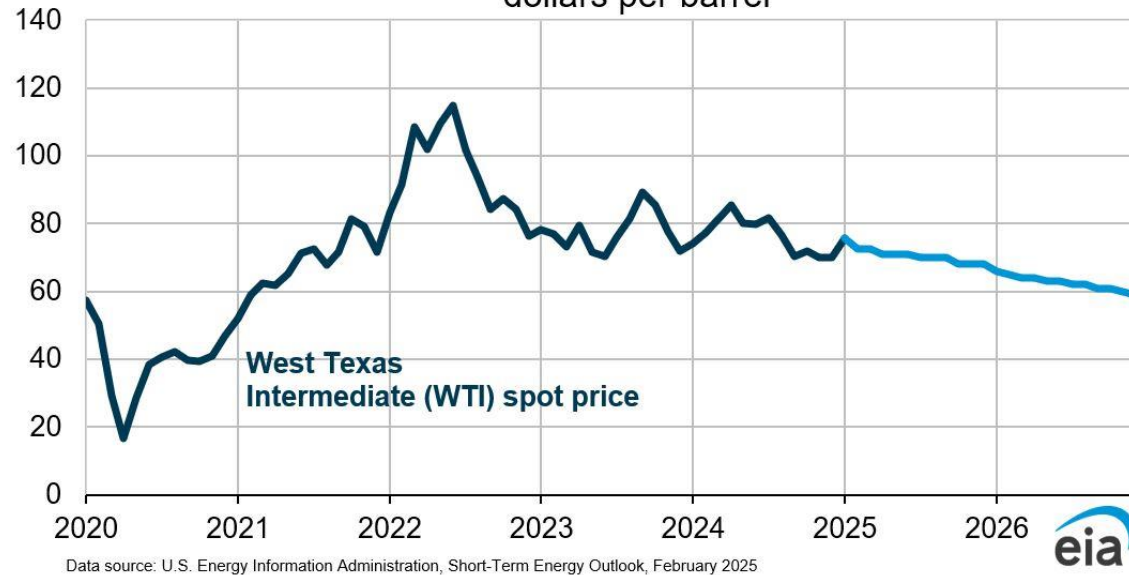
# Solving the Flaring Challenge





# EIA Oil Price Outlook (February 2025)

West Texas Intermediate (WTI) crude oil price  
dollars per barrel

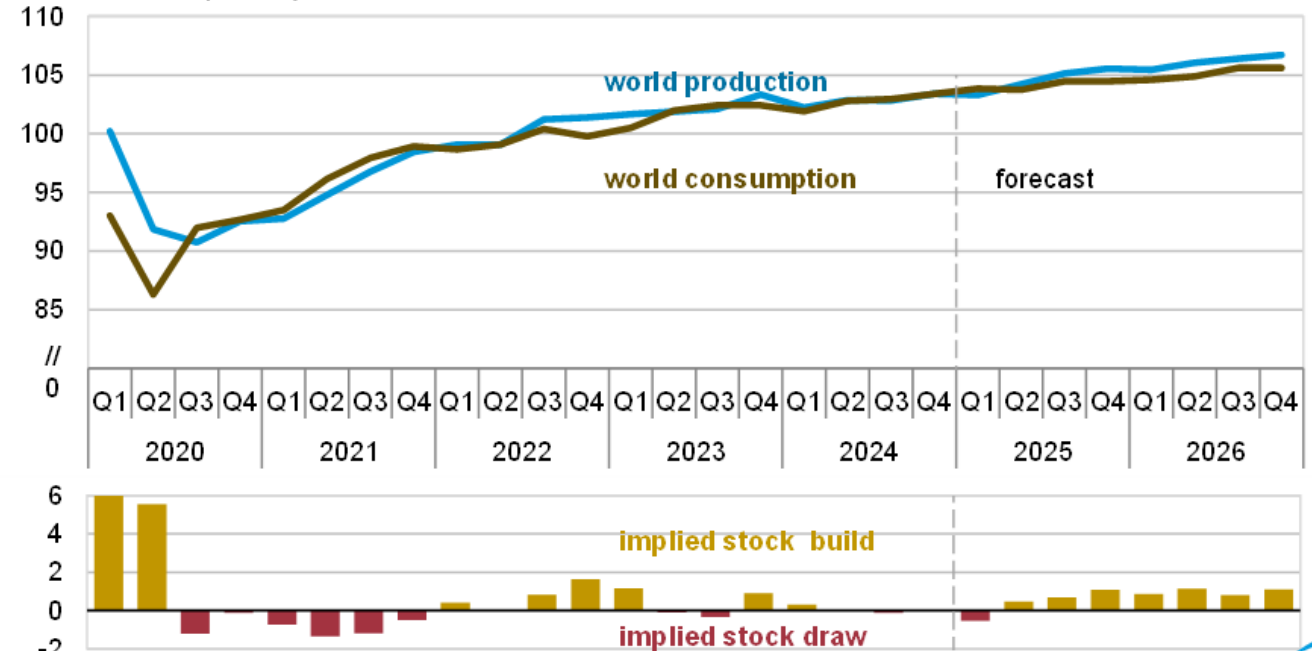


Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, February 2025



STEO forecast

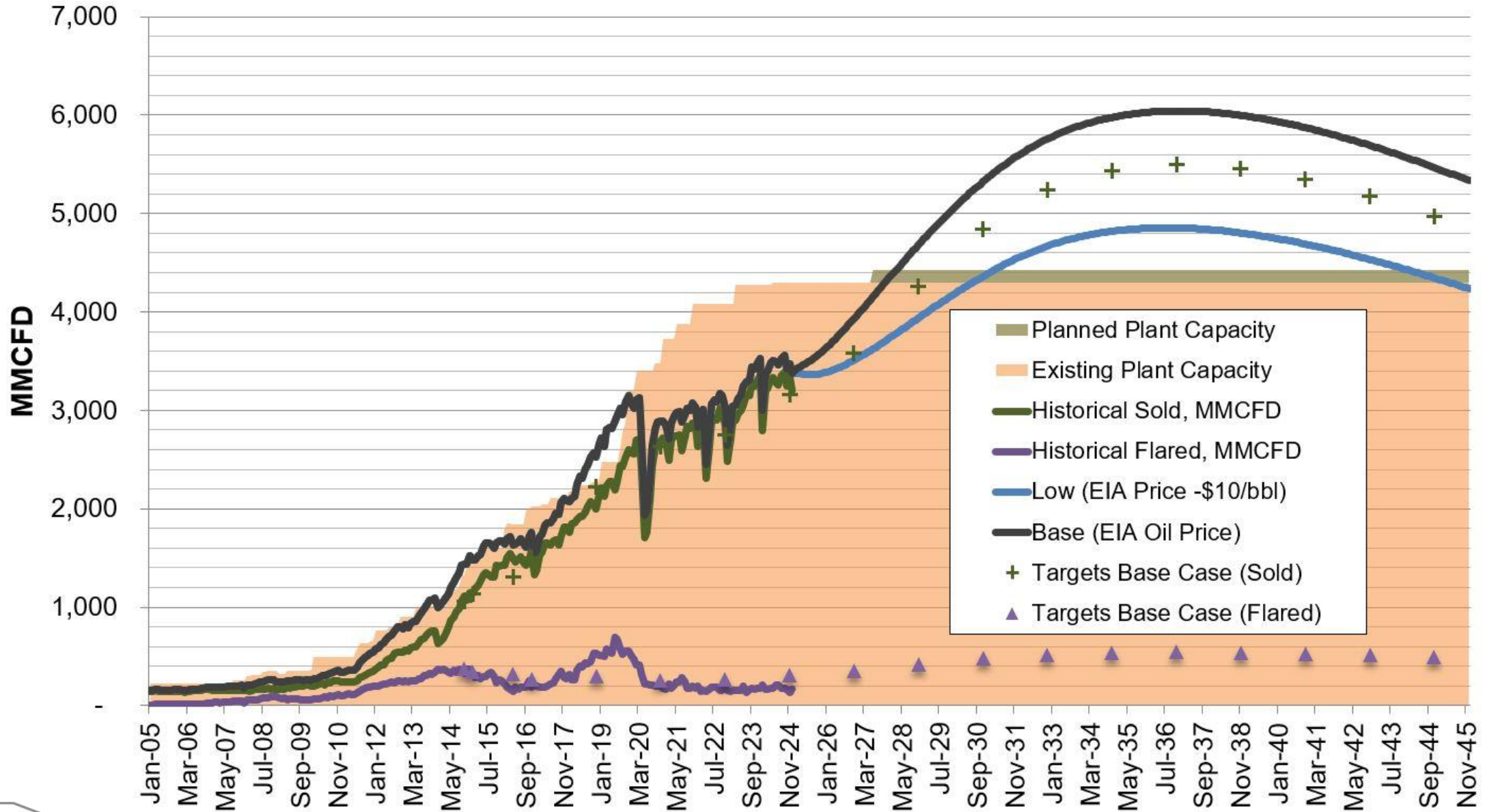
World liquid fuels production and consumption balance  
million barrels per day



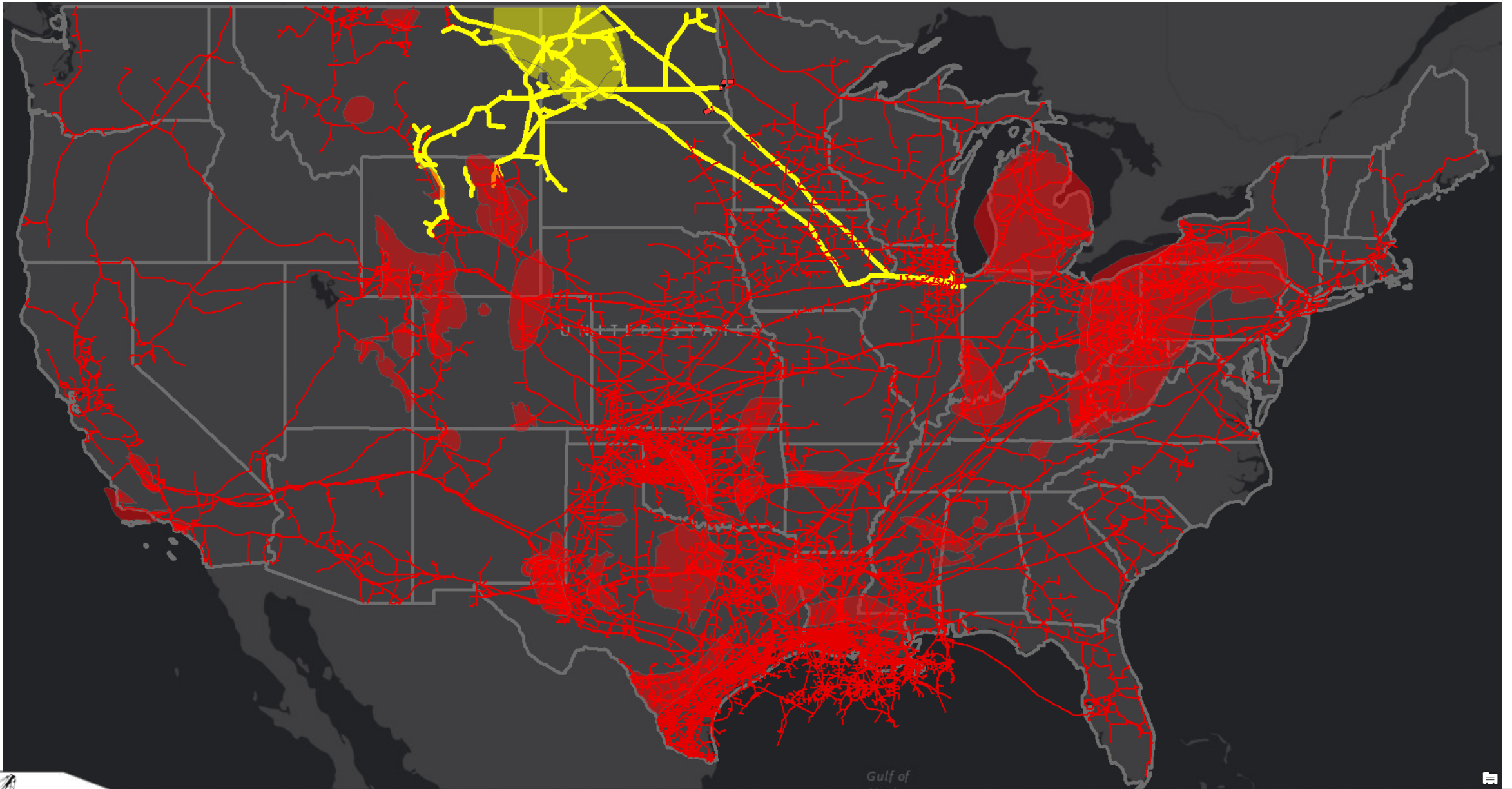
Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, February 2025



# North Dakota Gas Processing Outlook

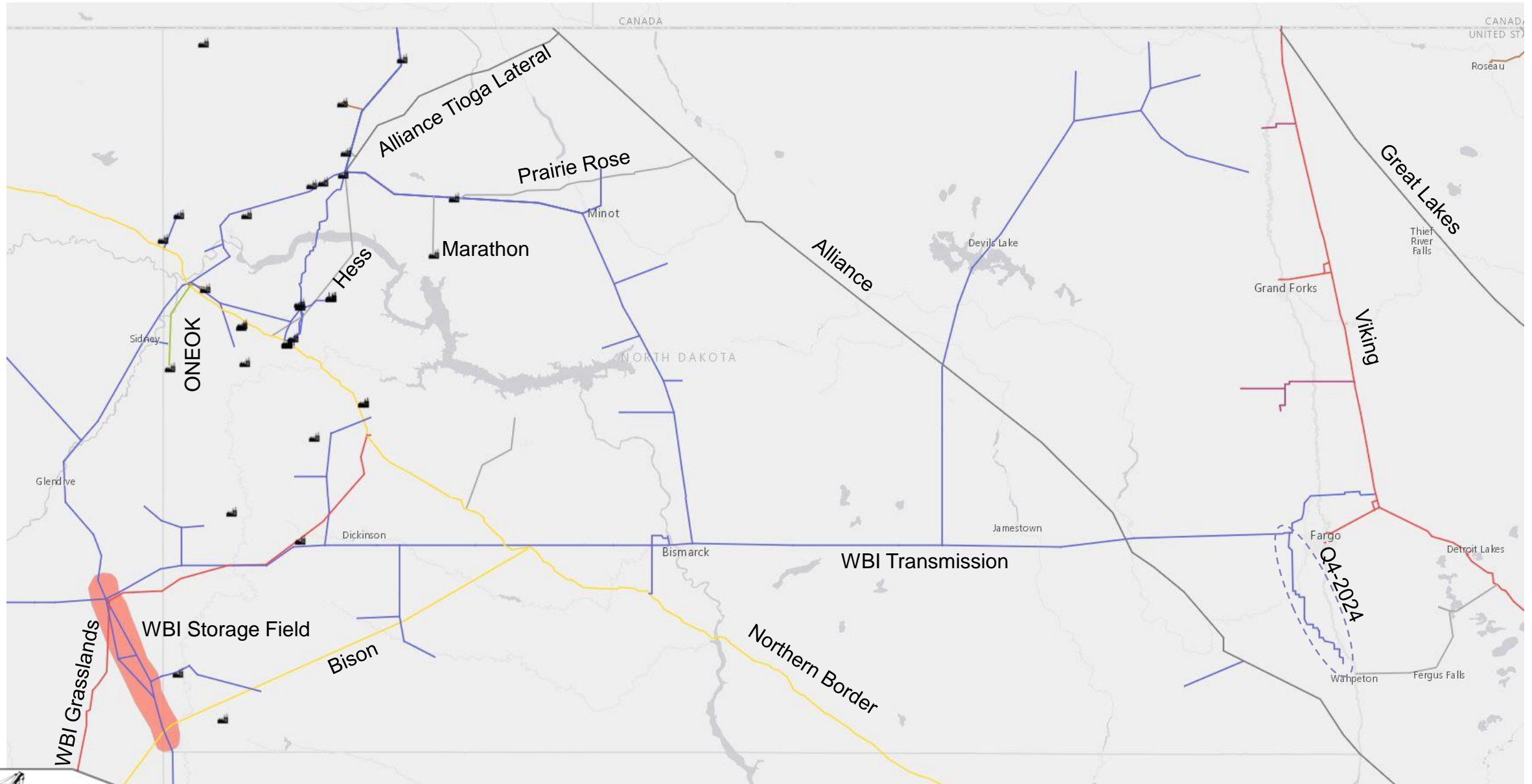


# Bakken Natural Gas Infrastructure

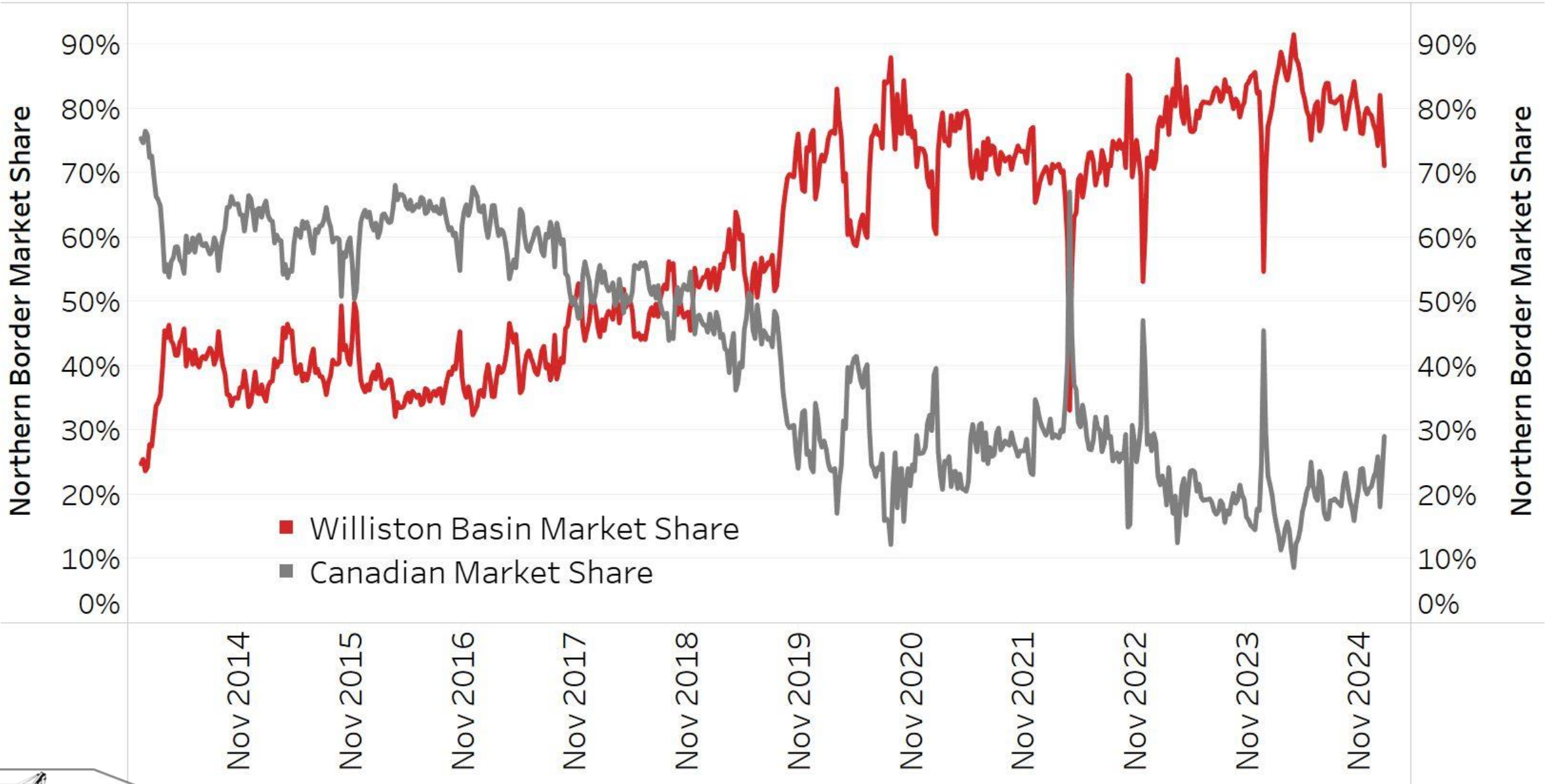




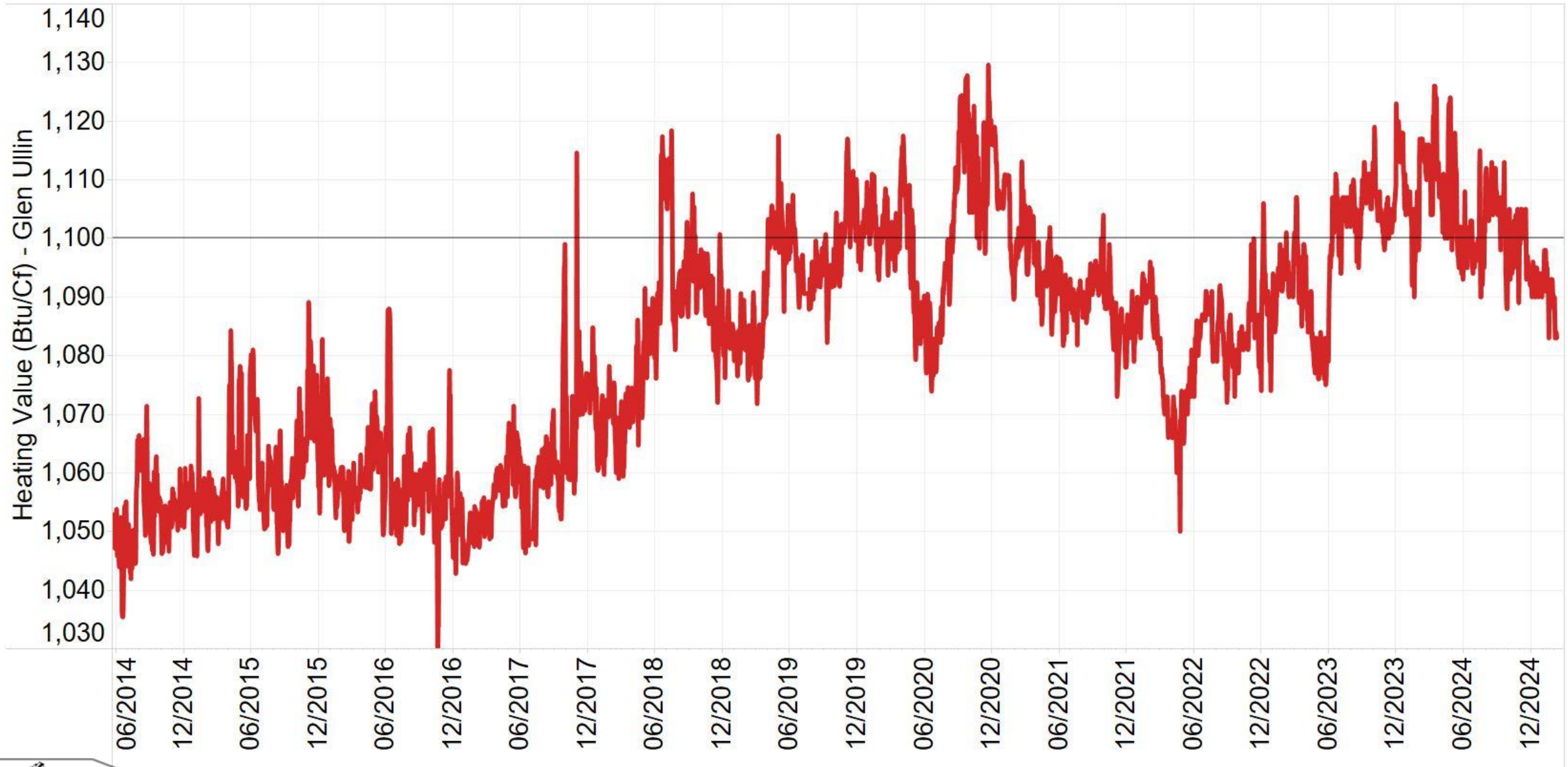
# Major Residue Gas Pipeline Infrastructure



# Northern Border Pipeline Market Share

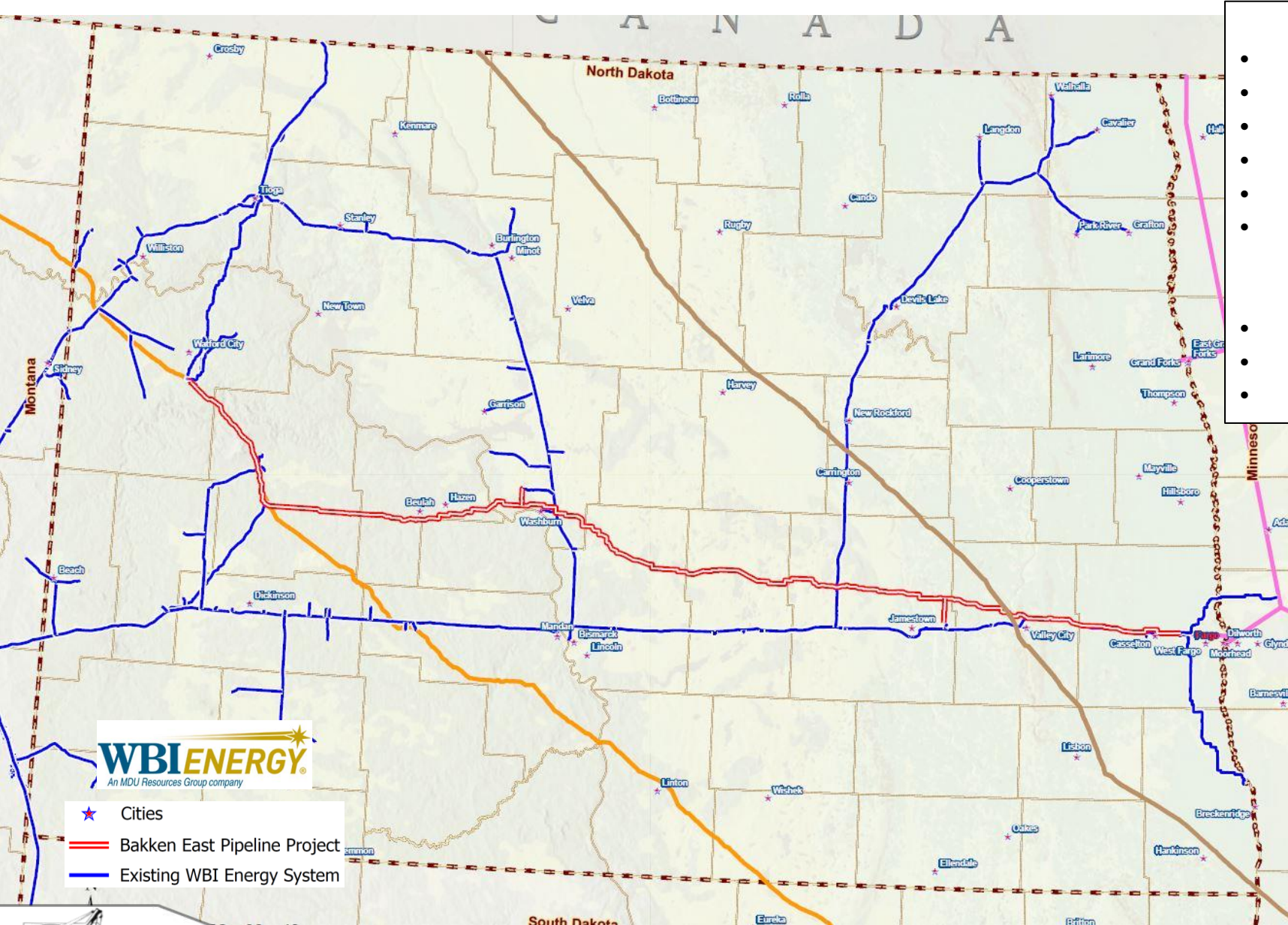


# Northern Border BTU at Glen Ullin, ND





# 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

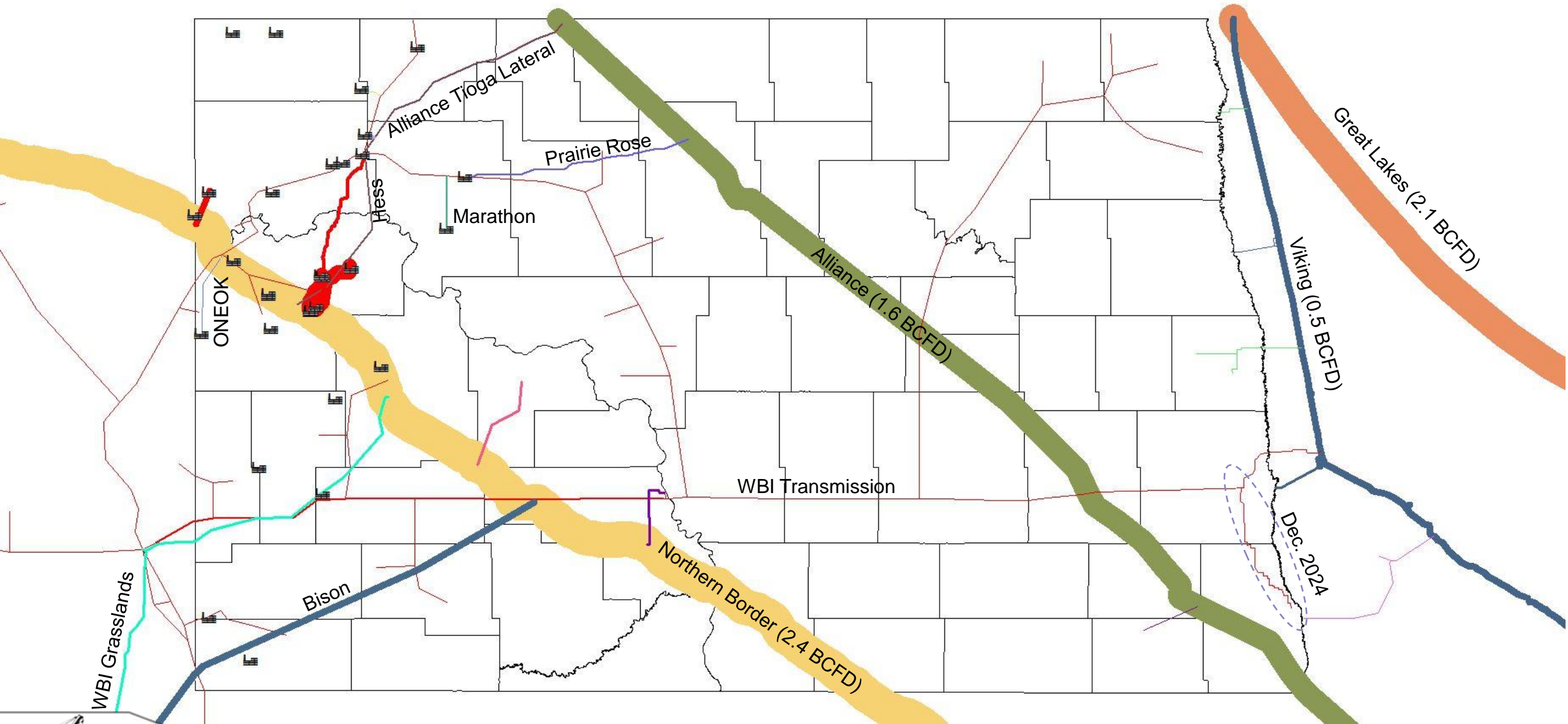
## Estimated Rates

- \$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





# Contact Information

Justin J. Kringstad, Director  
North Dakota Pipeline Authority

600 E. Boulevard Ave. Dept. 405  
Bismarck, ND 58505-0840

Phone: (701)220-6227  
E-mail: [jjkringstad@ndpipelines.com](mailto:jjkringstad@ndpipelines.com)



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

Website:

[www.northdakotapipelines.com](http://www.northdakotapipelines.com)

