

Pipeline Authority Monthly Update

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Director

North Dakota Pipeline Authority

April 22, 2025



US Williston Basin Oil Production - 2025

MONTH	ND	Eastern MT*	SD	TOTAL
January	1,175,127	74,307	2,281	1,251,715
February	1,163,874			
March				
April				
May				
June				
July				
August				
September				
October				
November				
December				

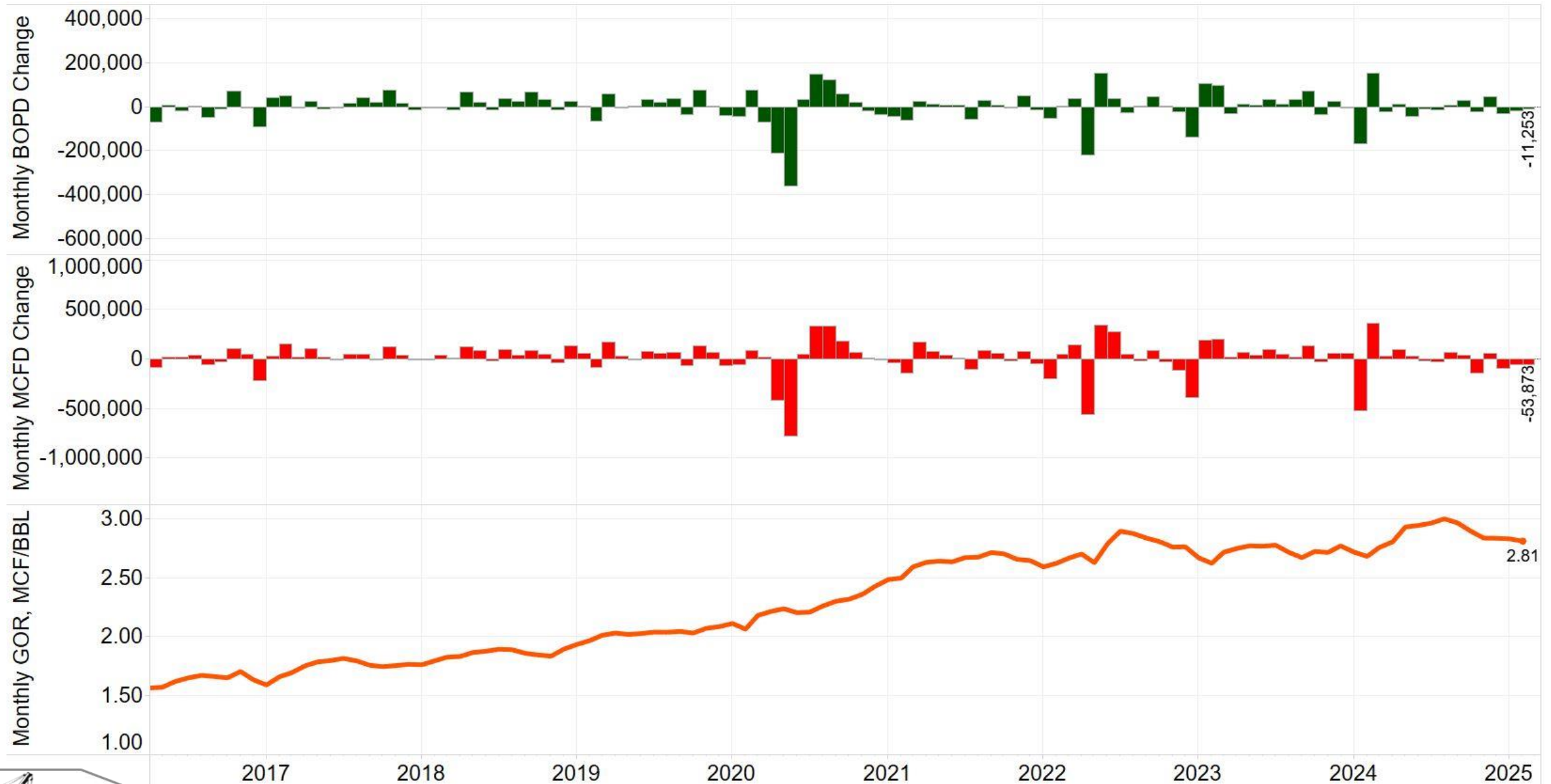


US Williston Basin Oil Production - 2024

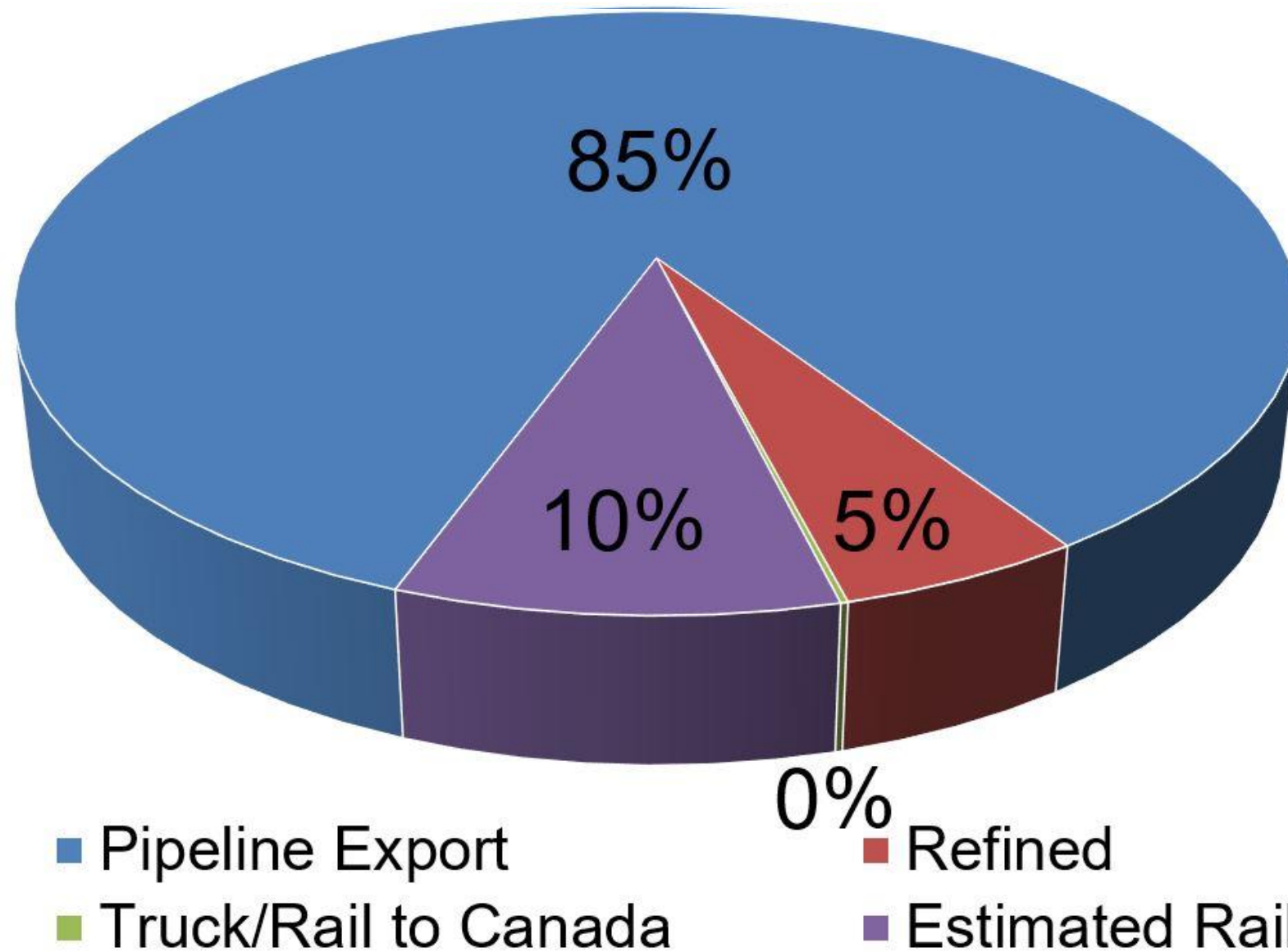
MONTH	ND	Eastern MT*	SD	TOTAL
January	1,105,208	59,279	2,312	1,166,798
February	1,256,126	66,332	2,412	1,324,870
March	1,231,474	70,690	2,590	1,304,754
April	1,243,018	72,393	2,430	1,317,841
May	1,198,803	72,636	2,349	1,273,788
June	1,186,409	71,587	2,370	1,260,366
July	1,169,457	69,348	2,329	1,241,134
August	1,176,696	75,914	2,349	1,254,959
September	1,203,157	74,878	2,326	1,280,361
October	1,180,995	78,486	2,487	1,261,968
November	1,225,297	83,144	2,265	1,310,706
December	1,192,248	76,408	2,246	1,270,901



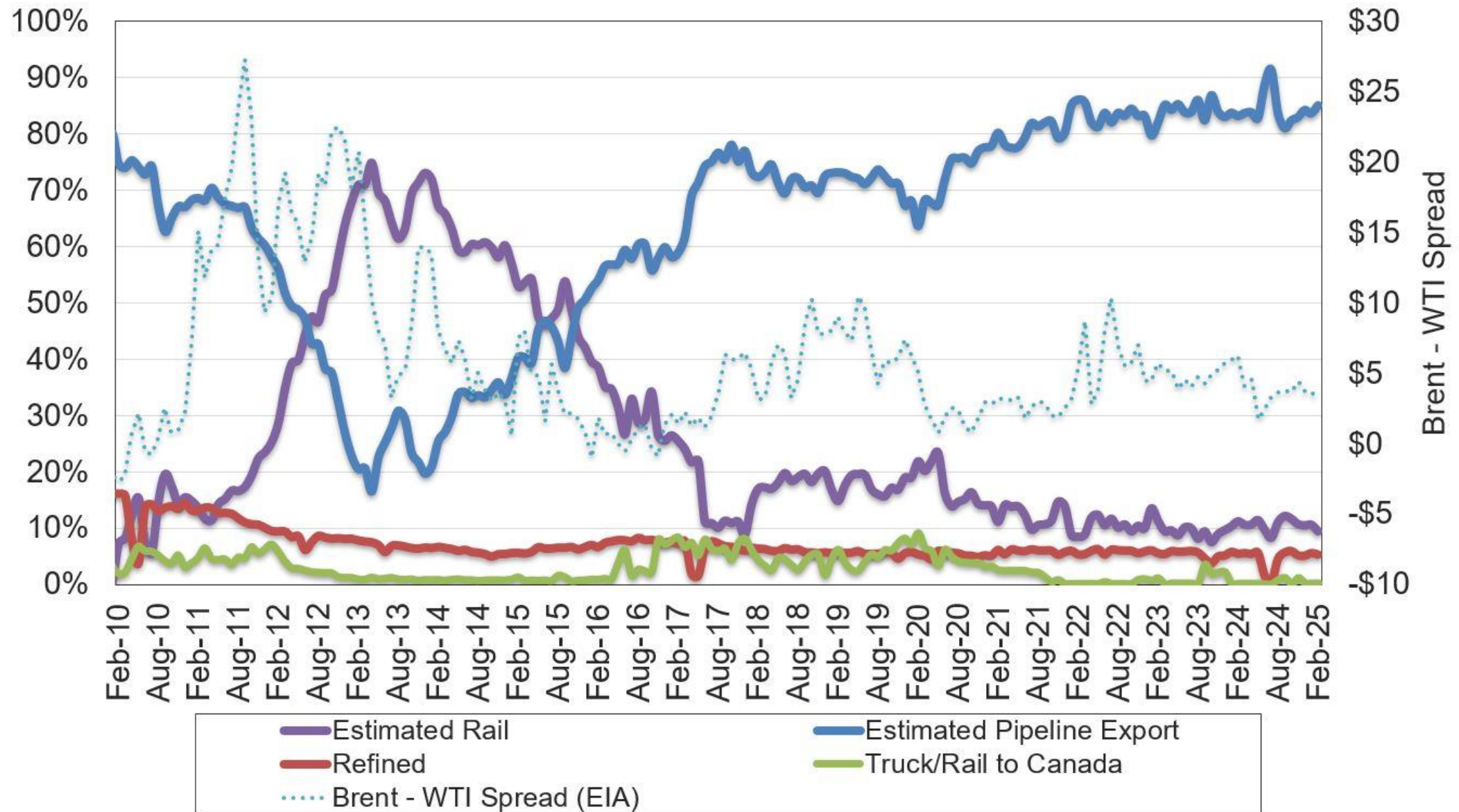
North Dakota Monthly Production Change



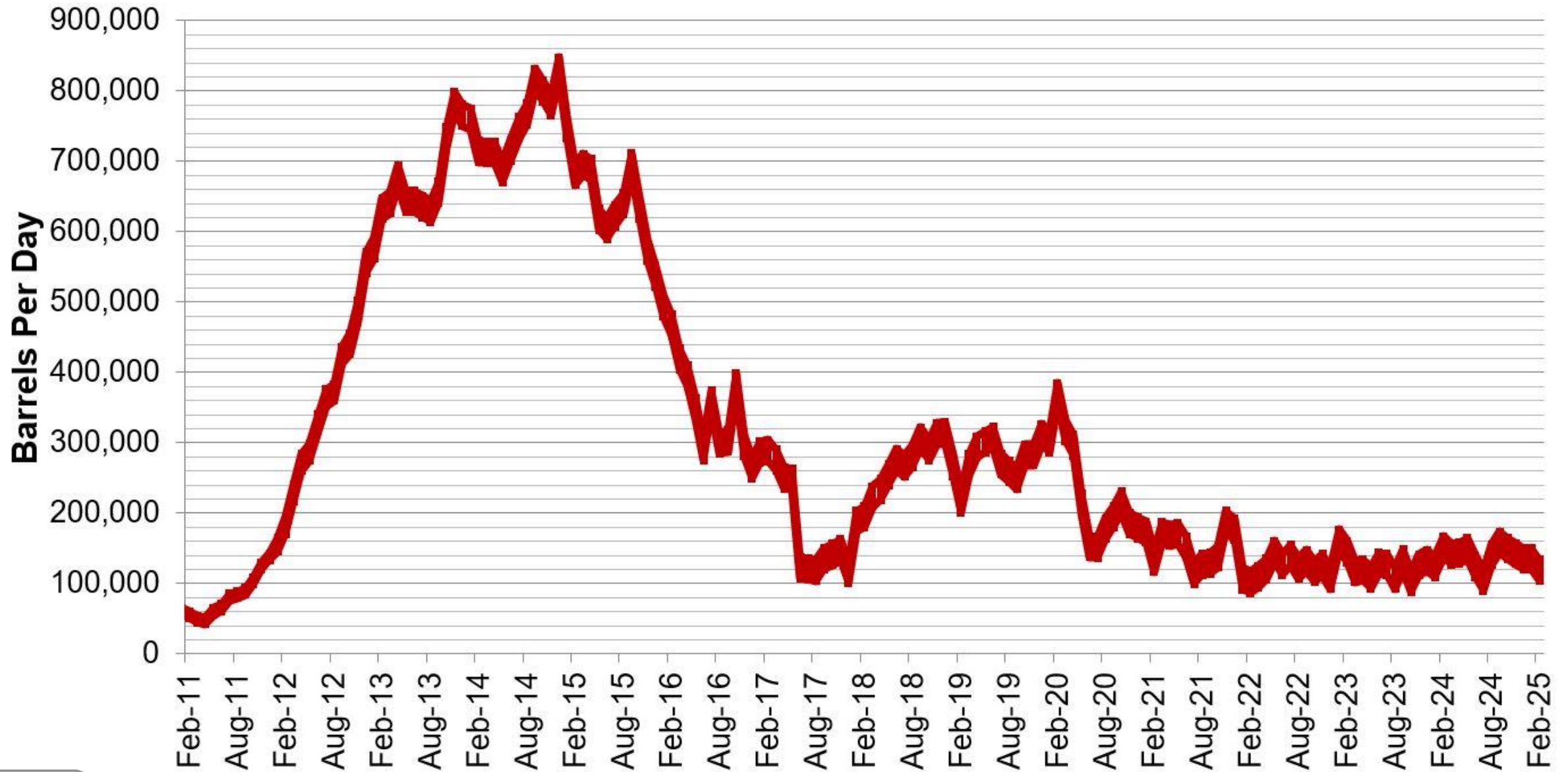
Estimated Williston Basin Oil Transportation



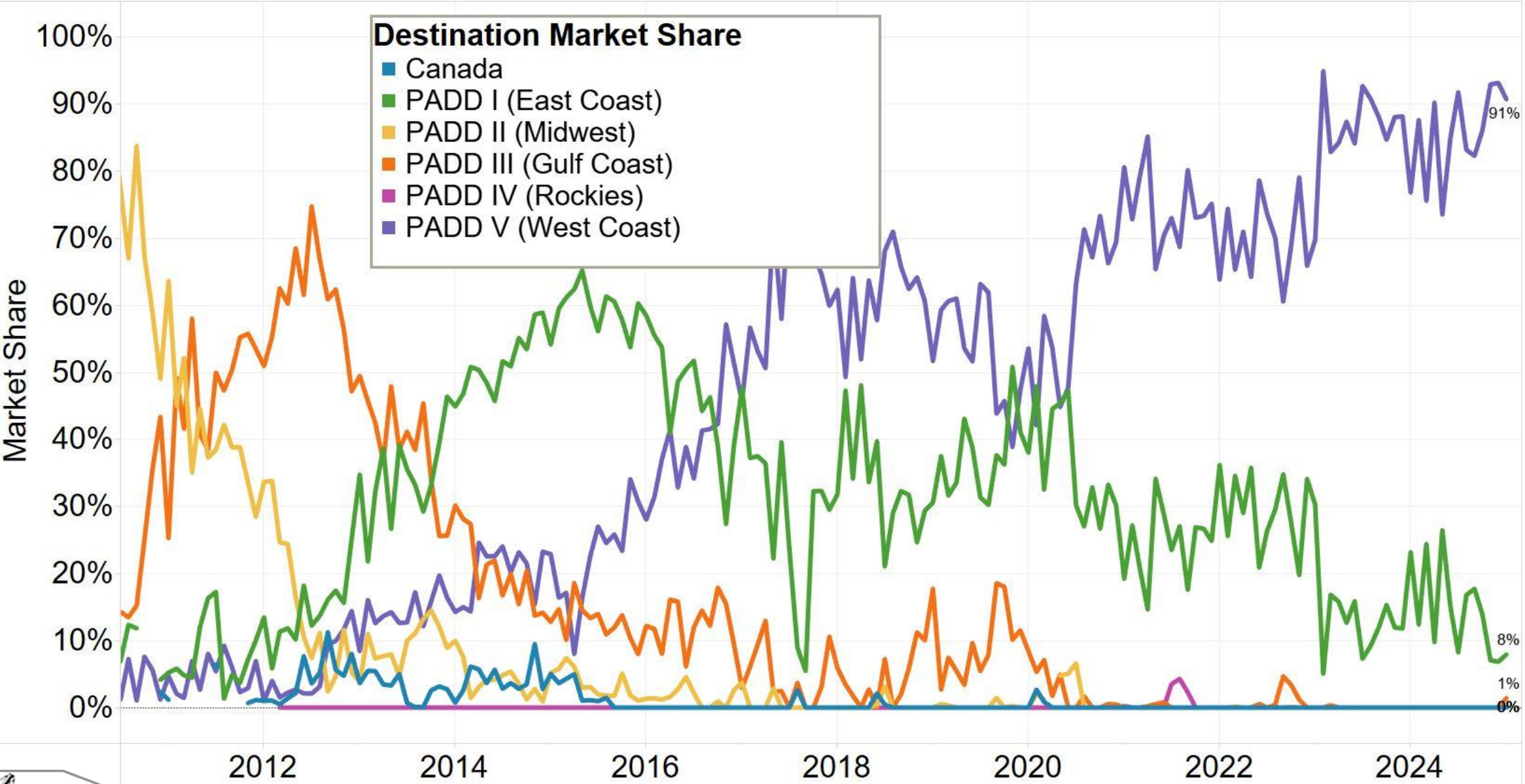
Estimated Williston Basin Oil Transportation



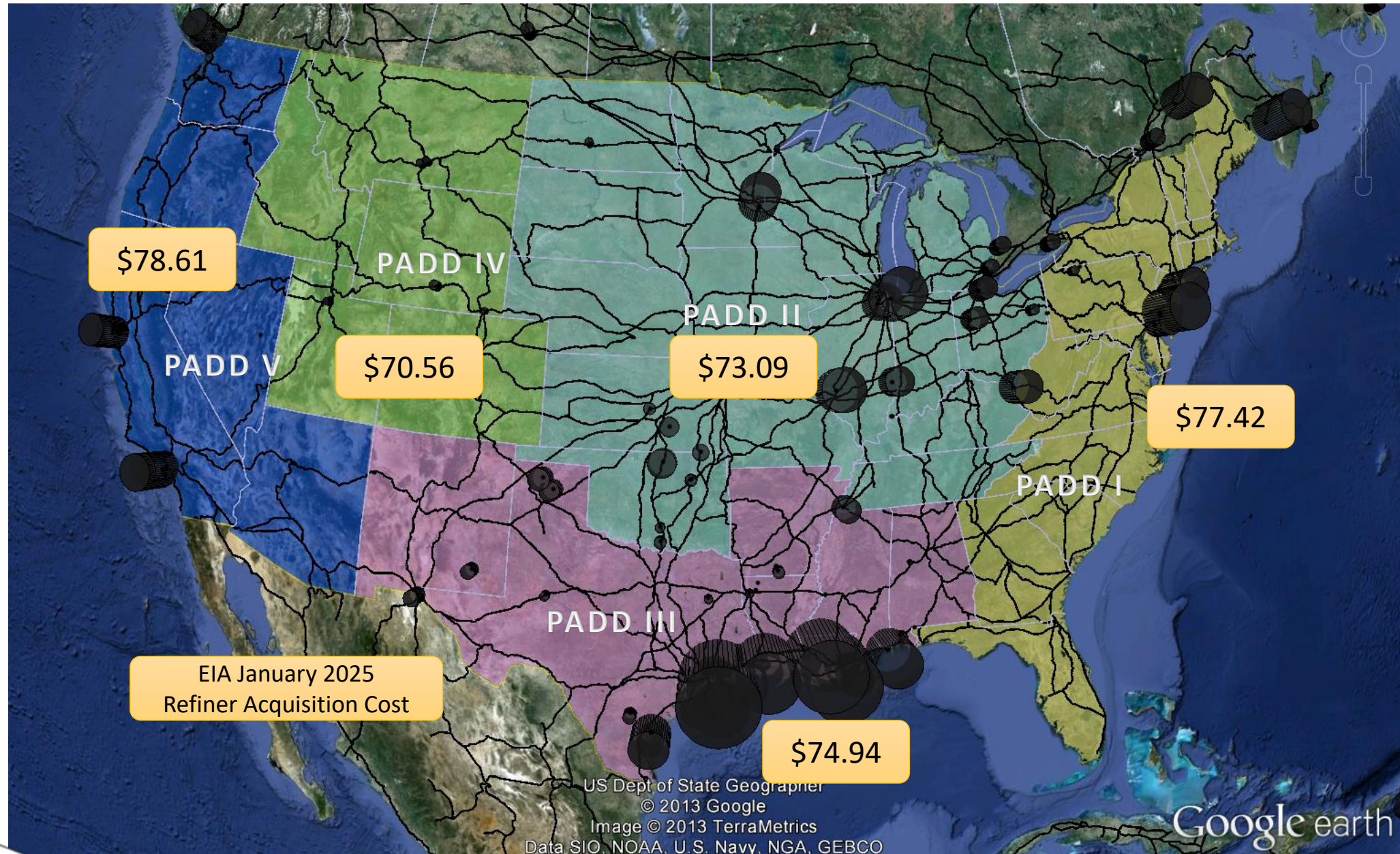
Estimated ND Rail Export Volumes



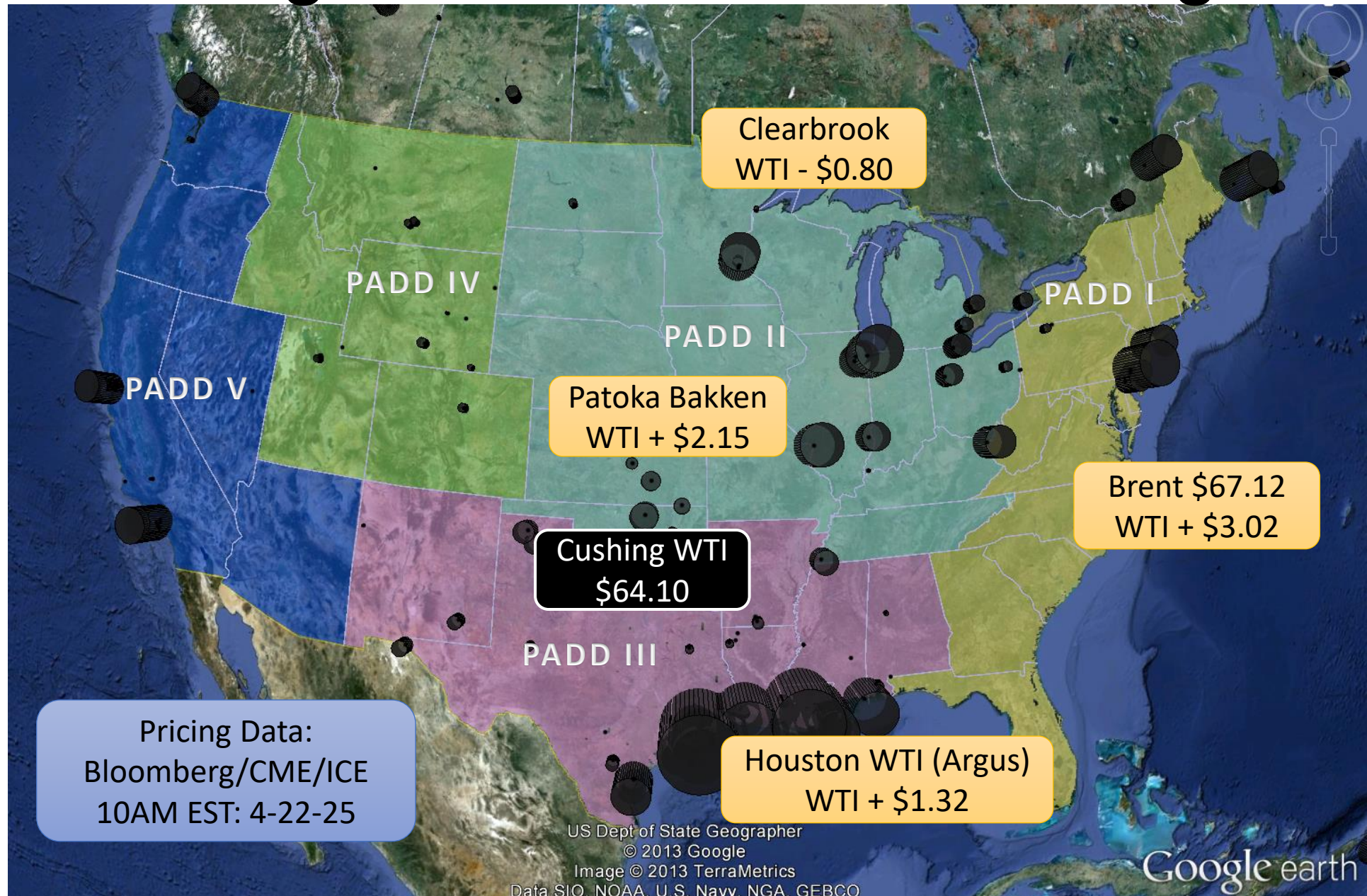
Rail Destinations Market Share (Jan. 2025)



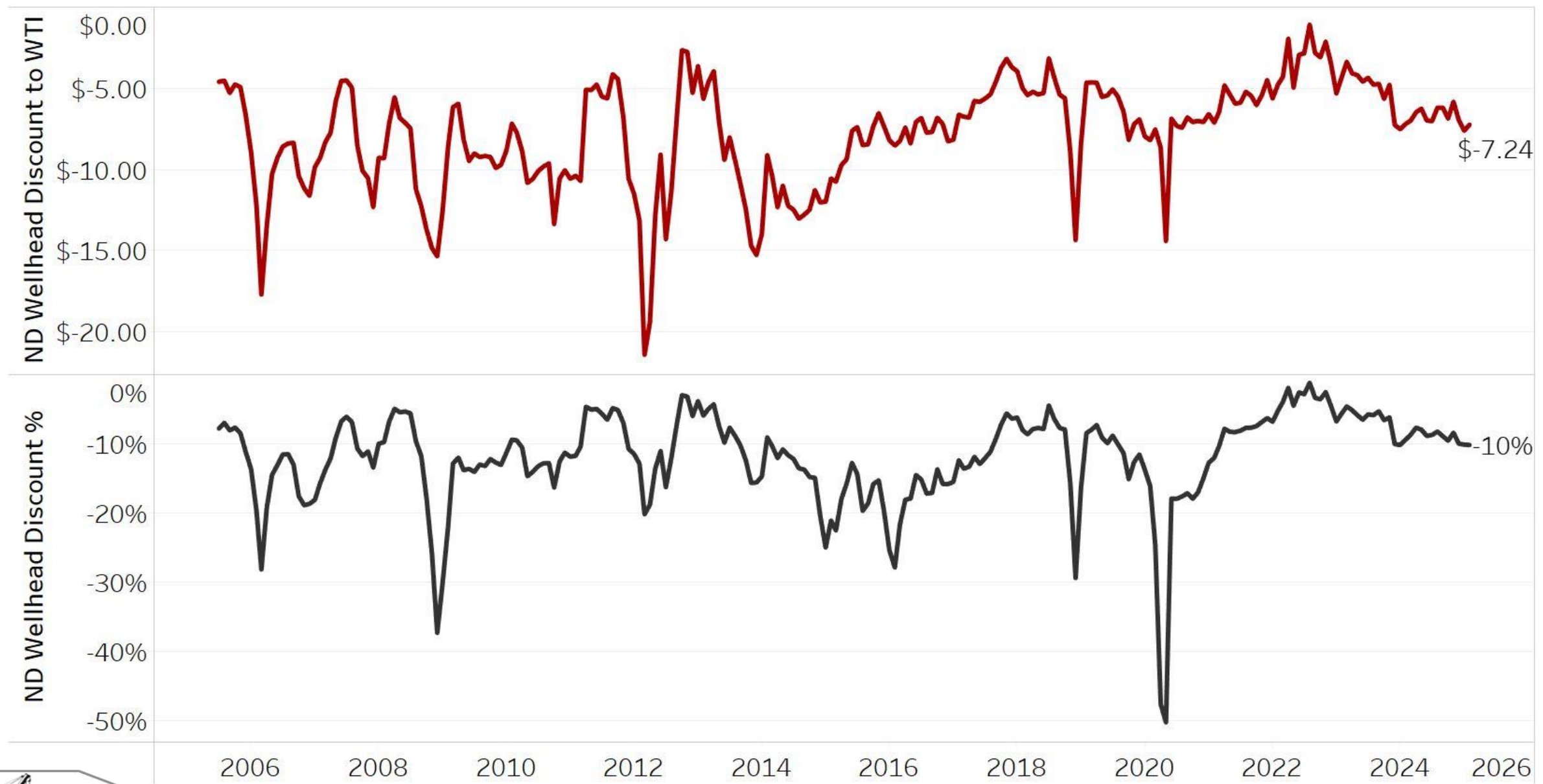
Major Rail Lines and Refineries



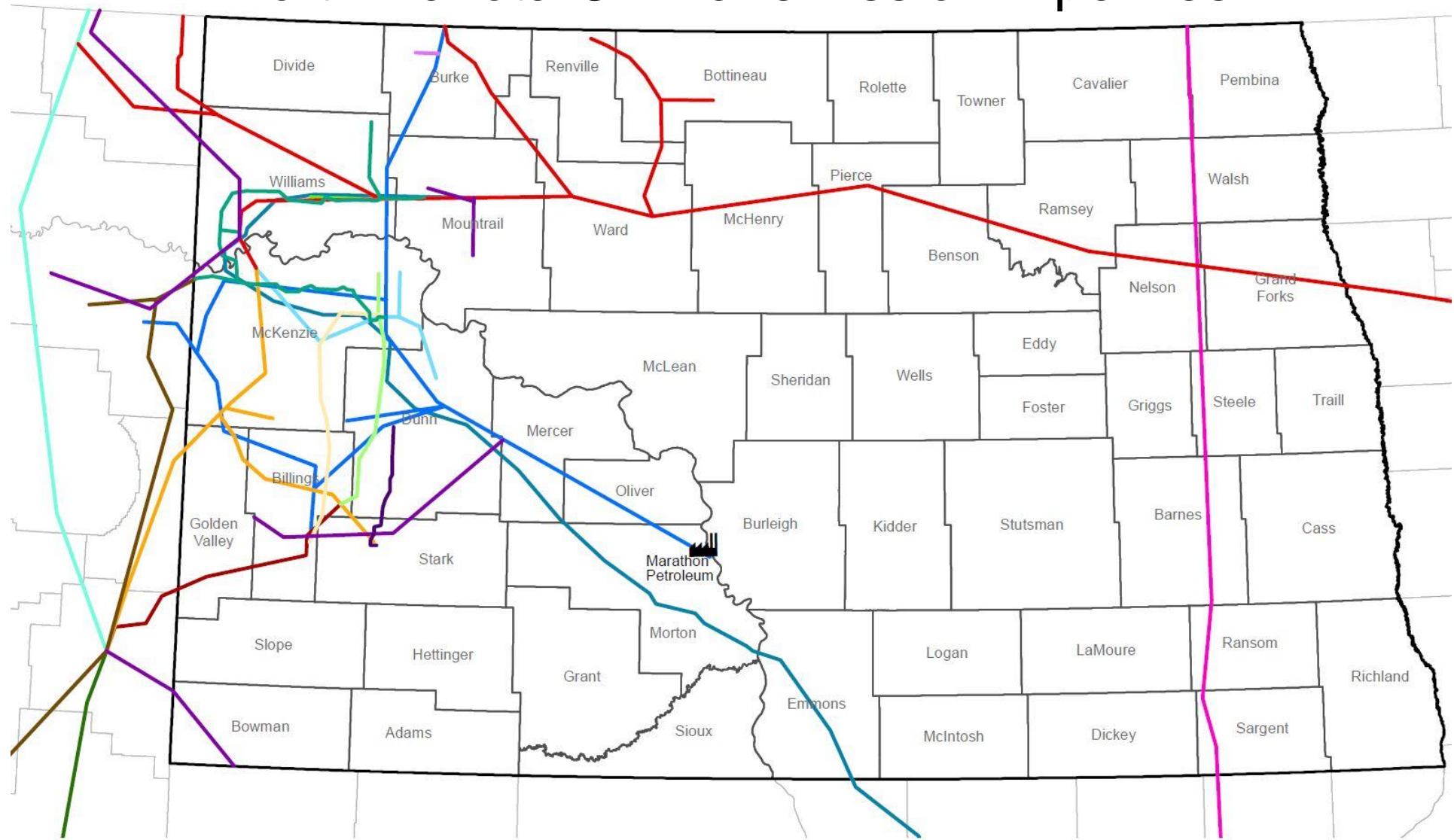
Major Pricing Benchmarks & Refining Centers



Average North Dakota Oil “Discount” to WTI



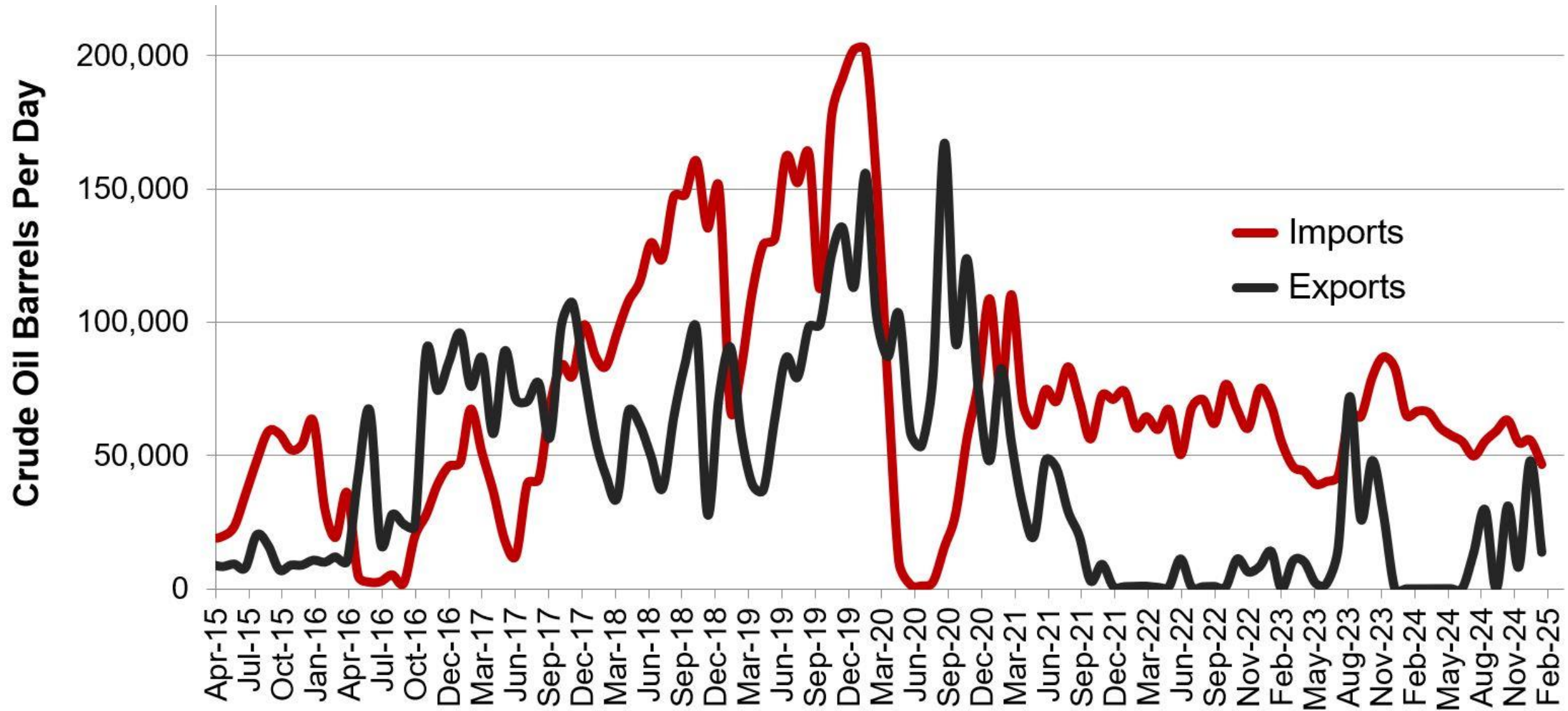
North Dakota Oil Transmission Pipelines



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



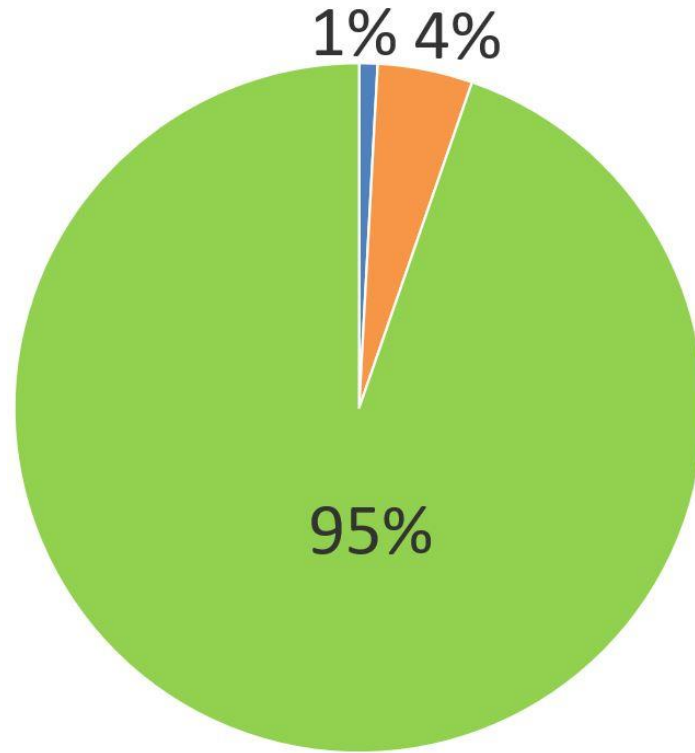
Williston Basin Truck/Rail Imports and Exports with Canada



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.

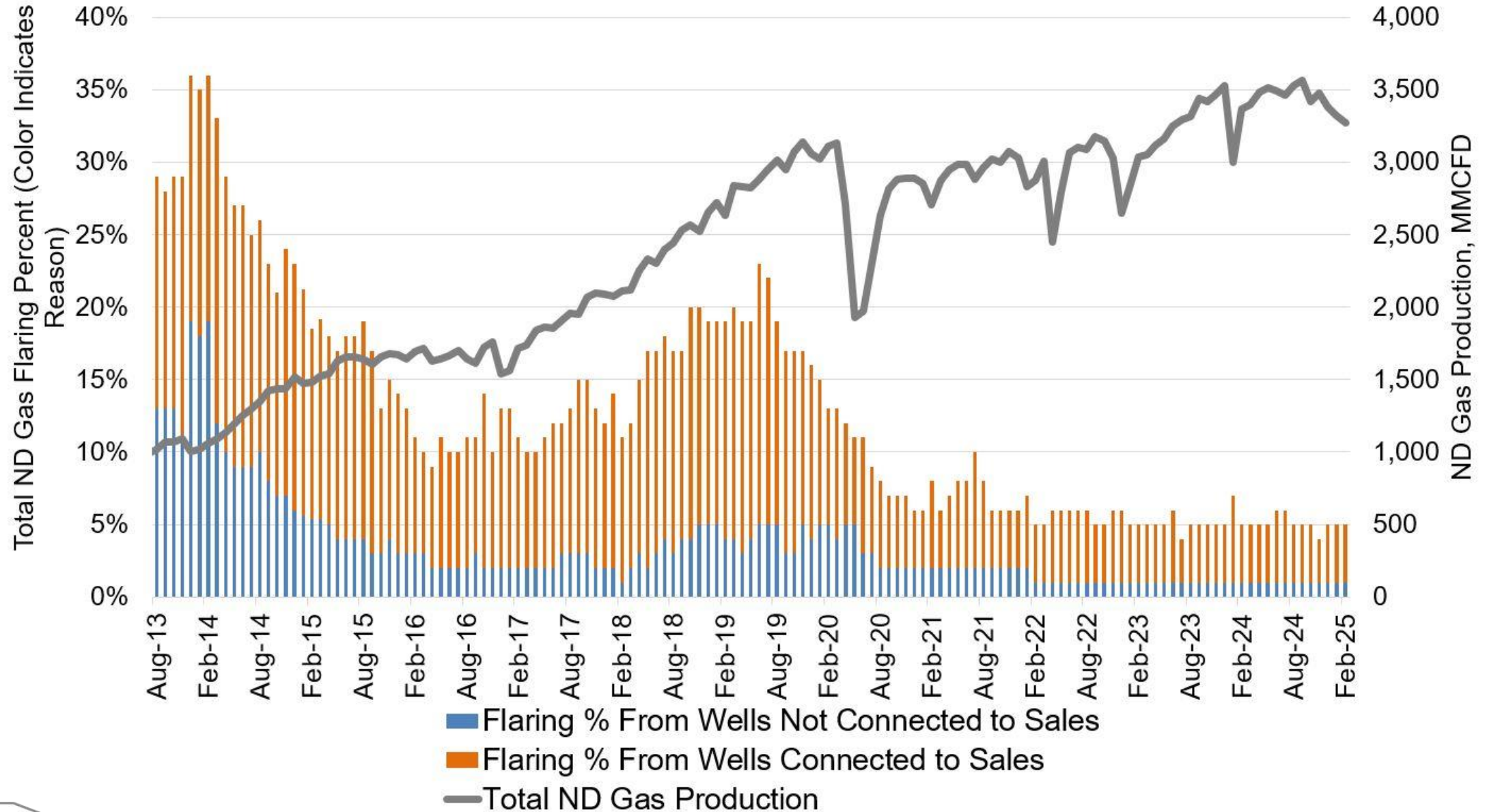
Simple Terms

Blue – Lack of pipelines
Orange – Challenges on existing infrastructure

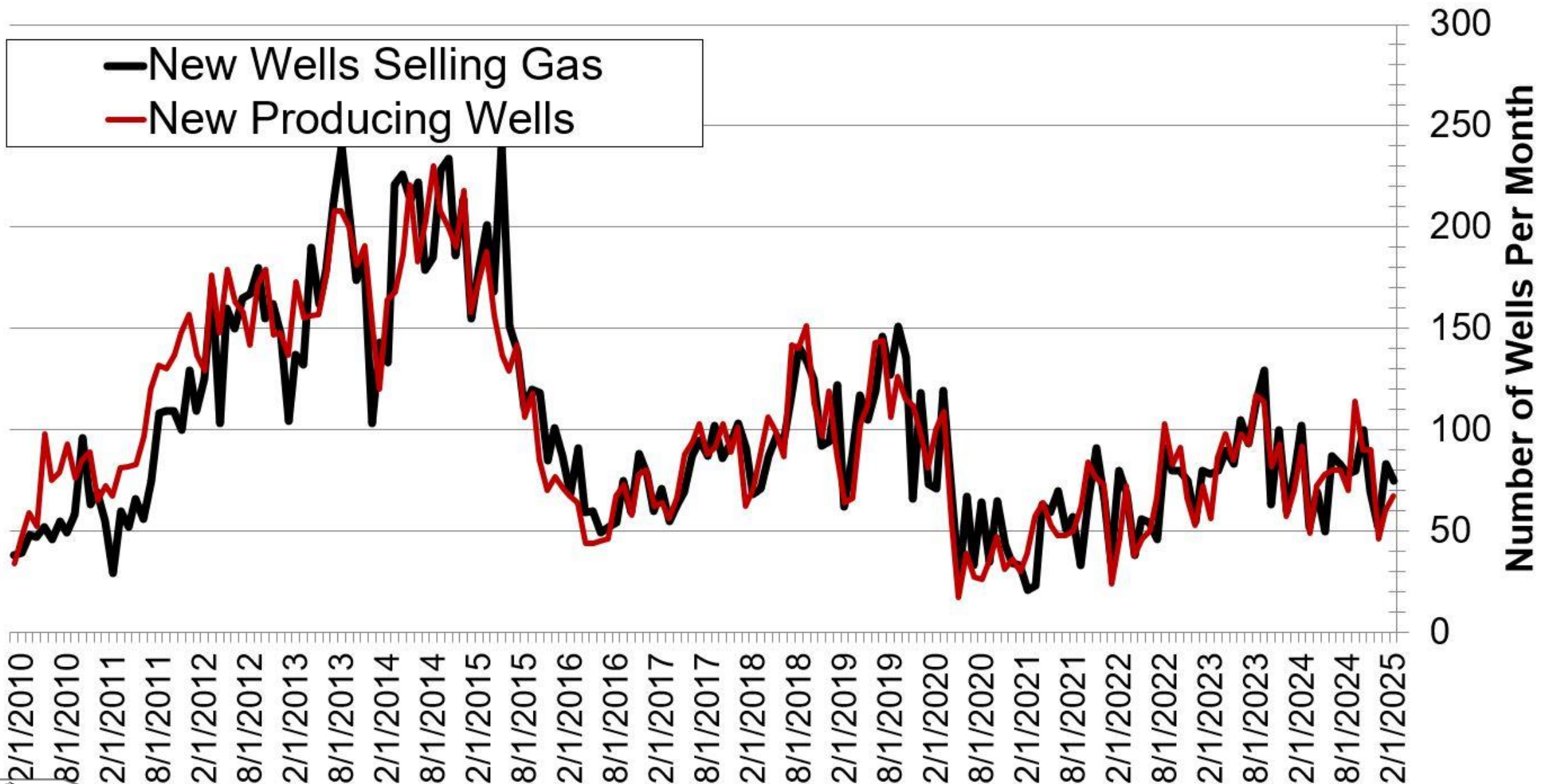
Feb. 2025 Data – Non-Confidential Wells



Solving the Flaring Challenge

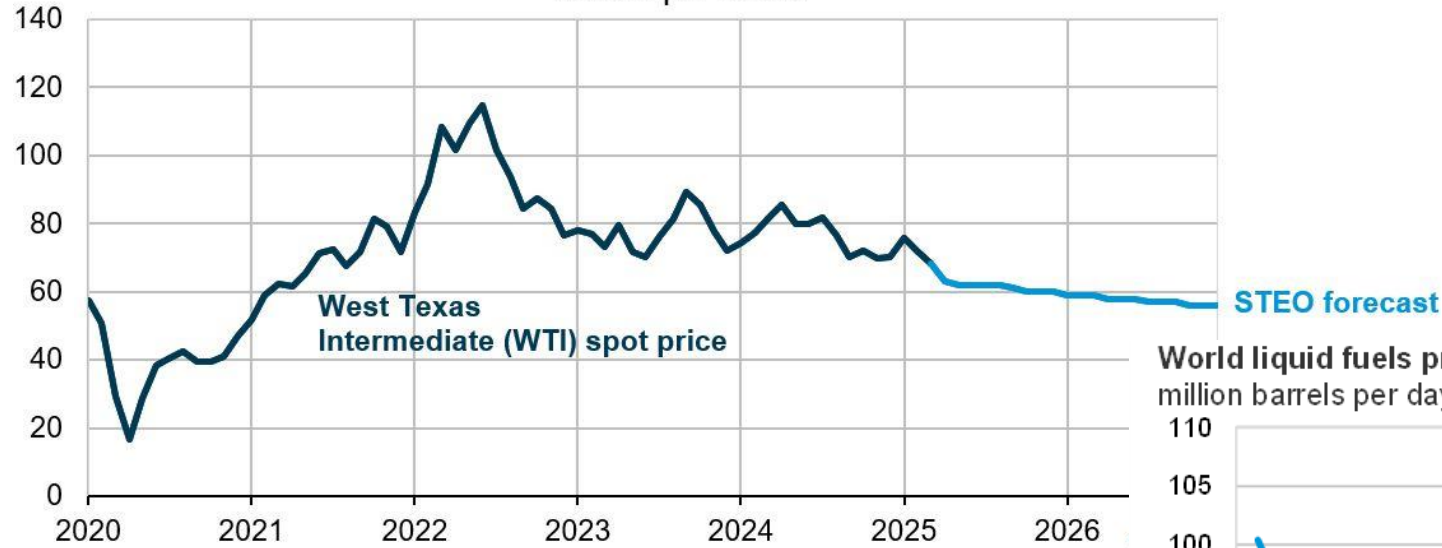


Solving the Flaring Challenge



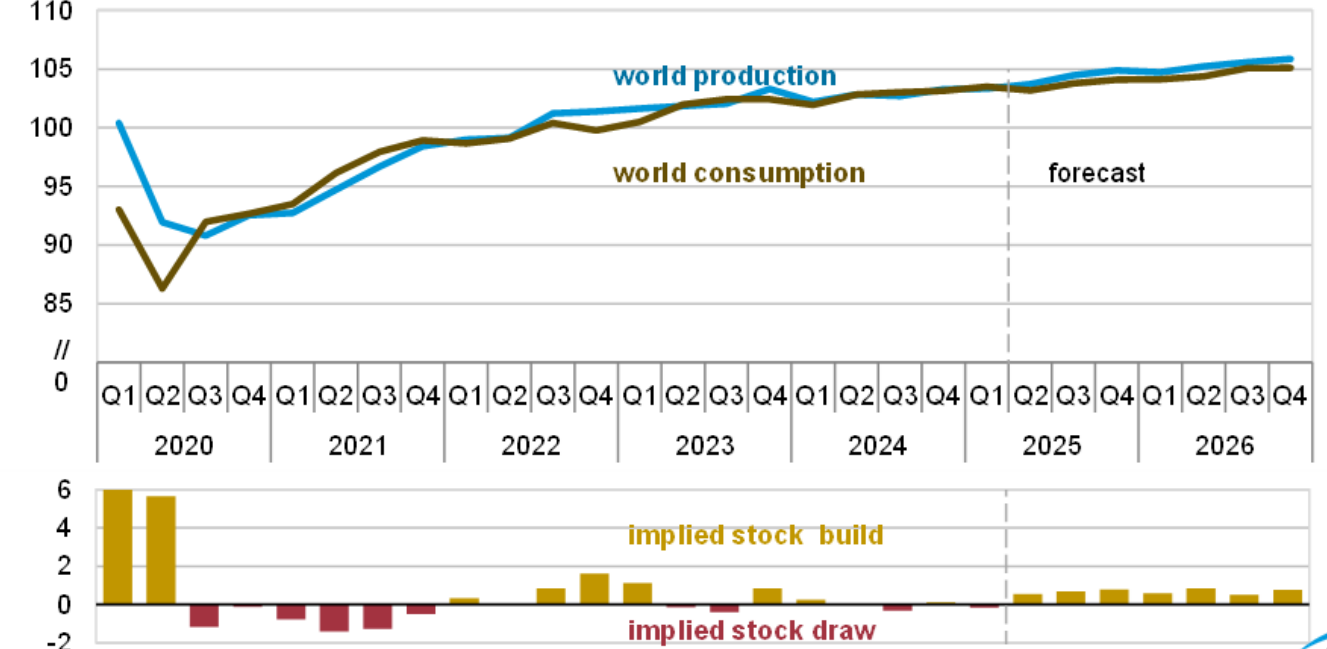
EIA Oil Price Outlook (April 2025)

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



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

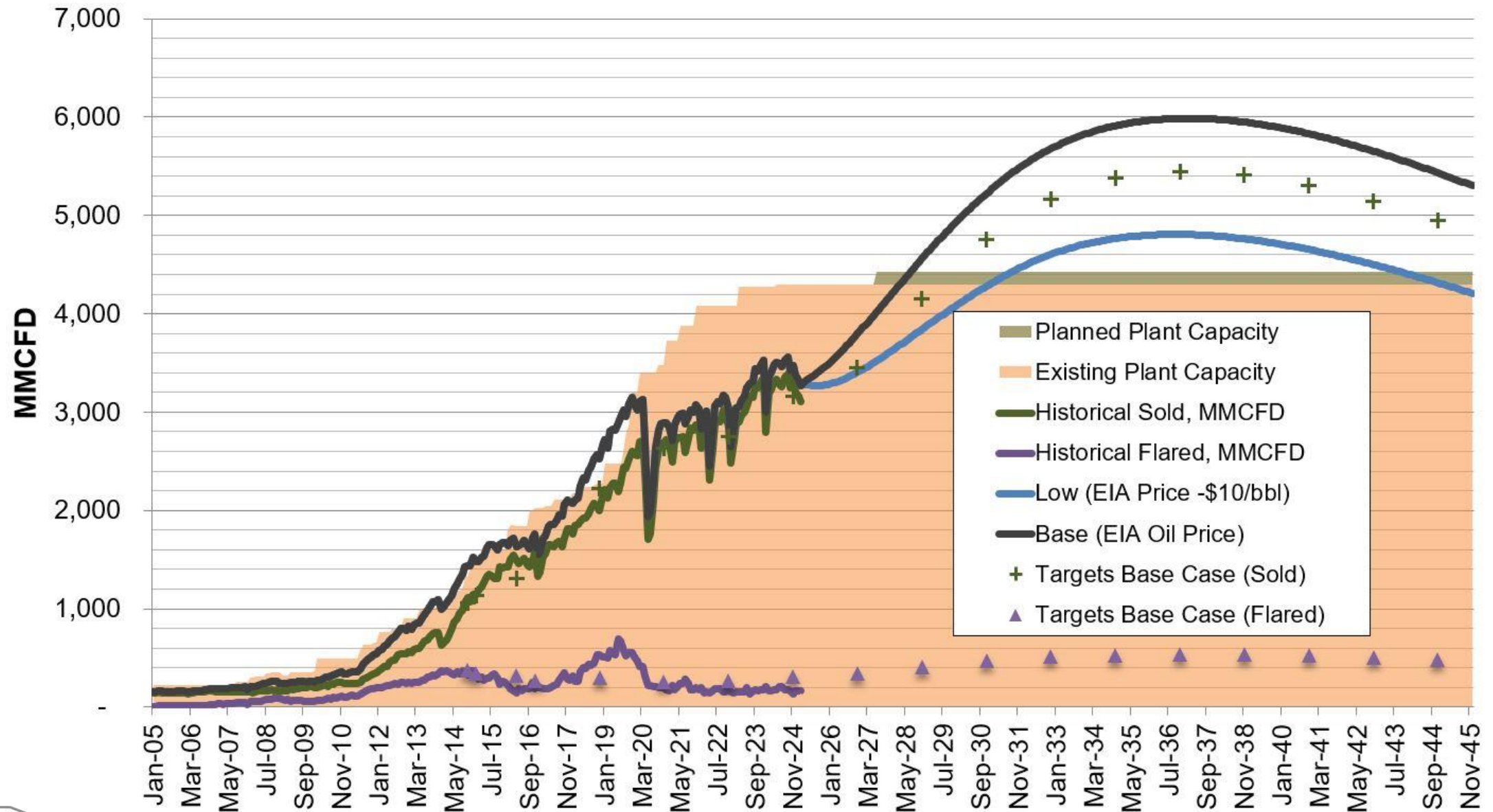
World liquid fuels production and consumption balance
million barrels per day



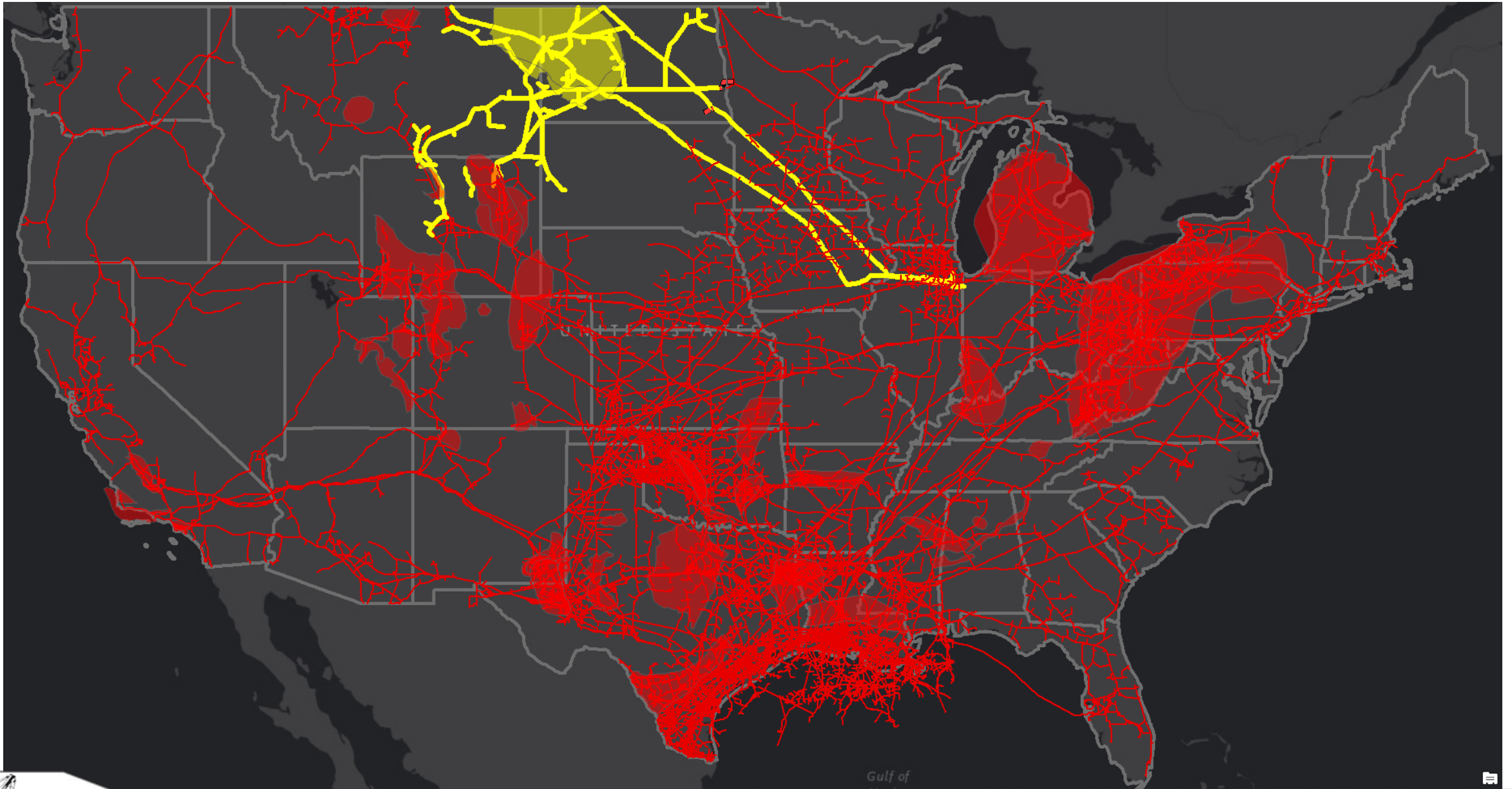
Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, April 2025



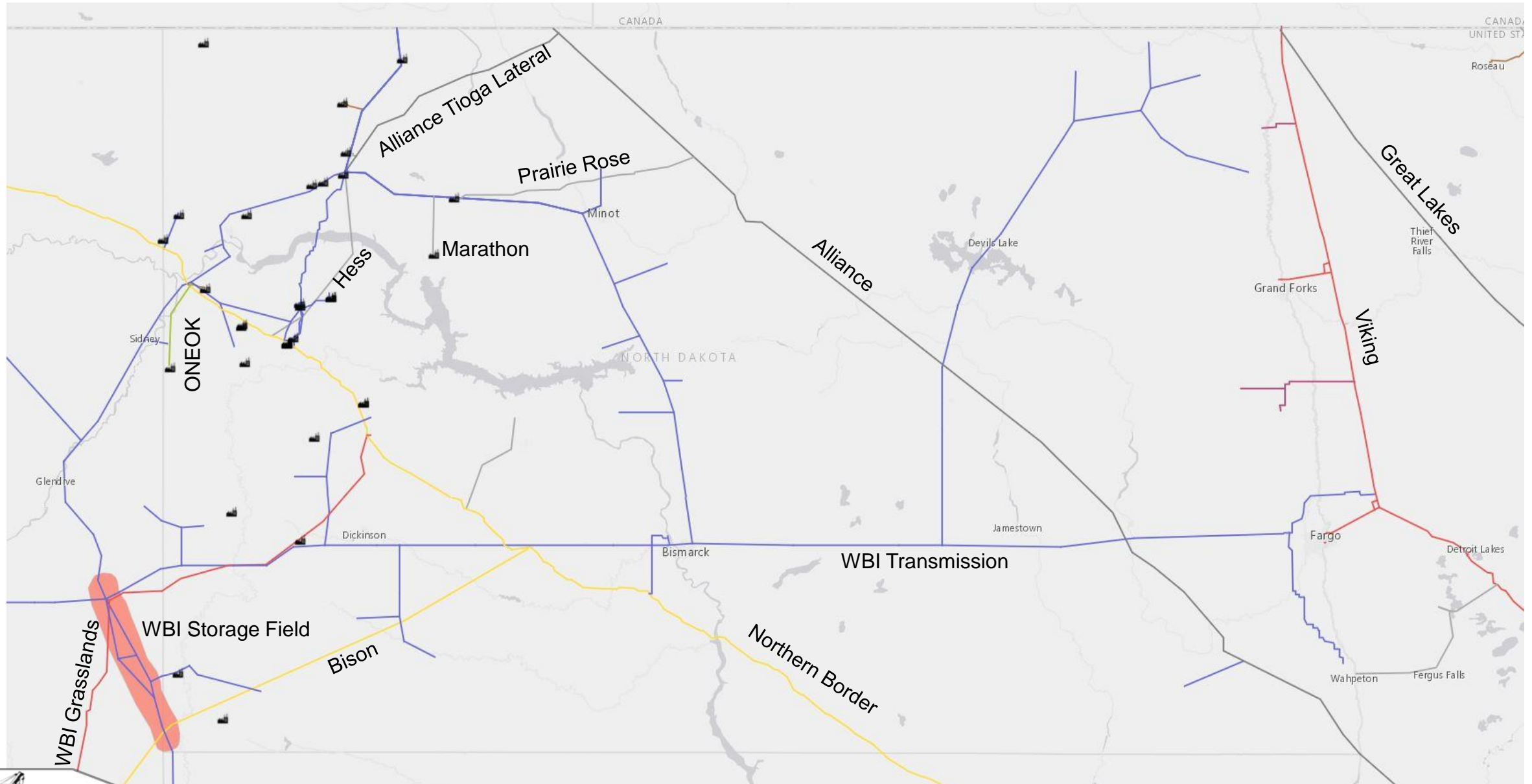
North Dakota Gas Processing Outlook



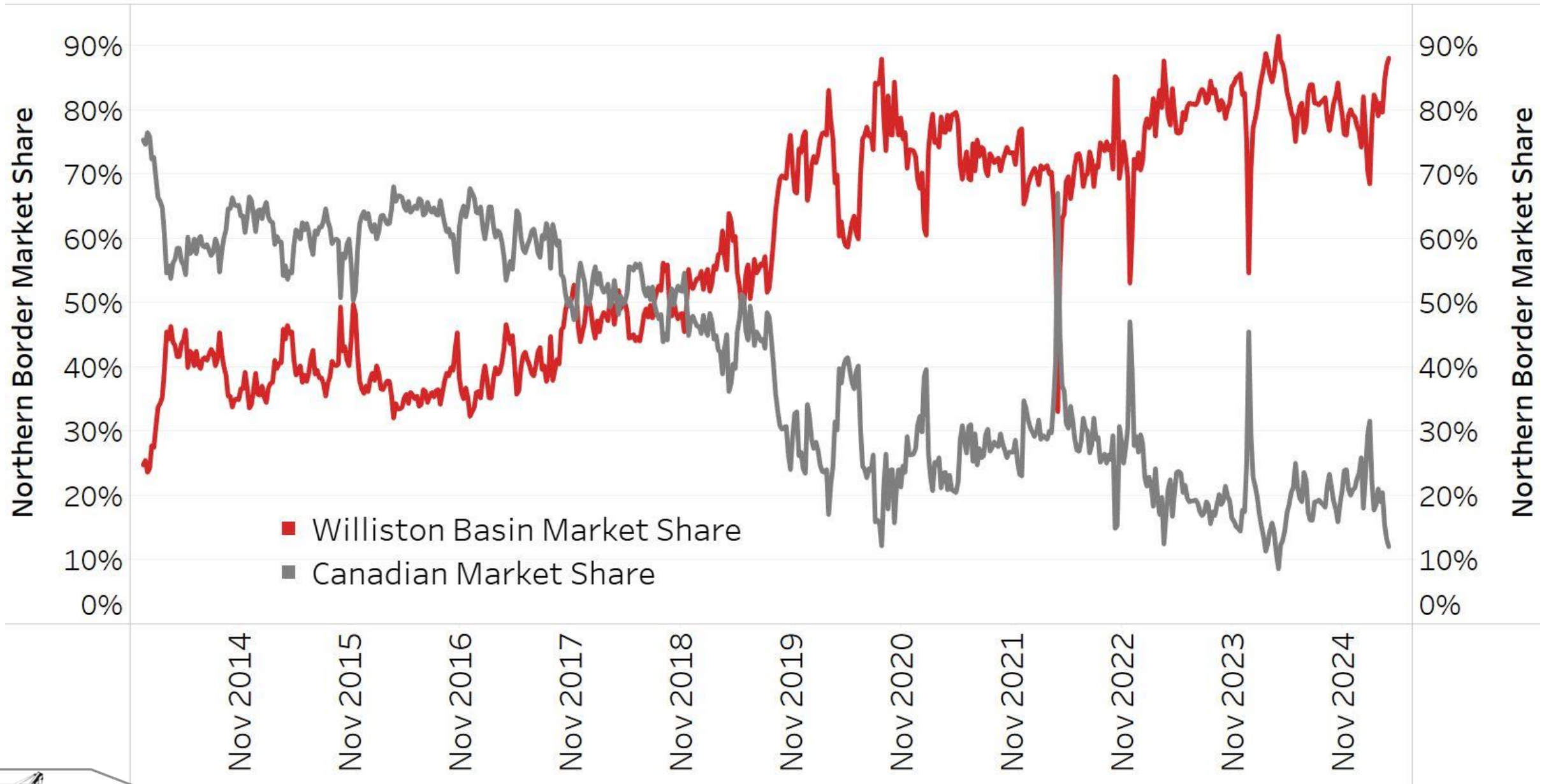
Bakken Natural Gas Infrastructure



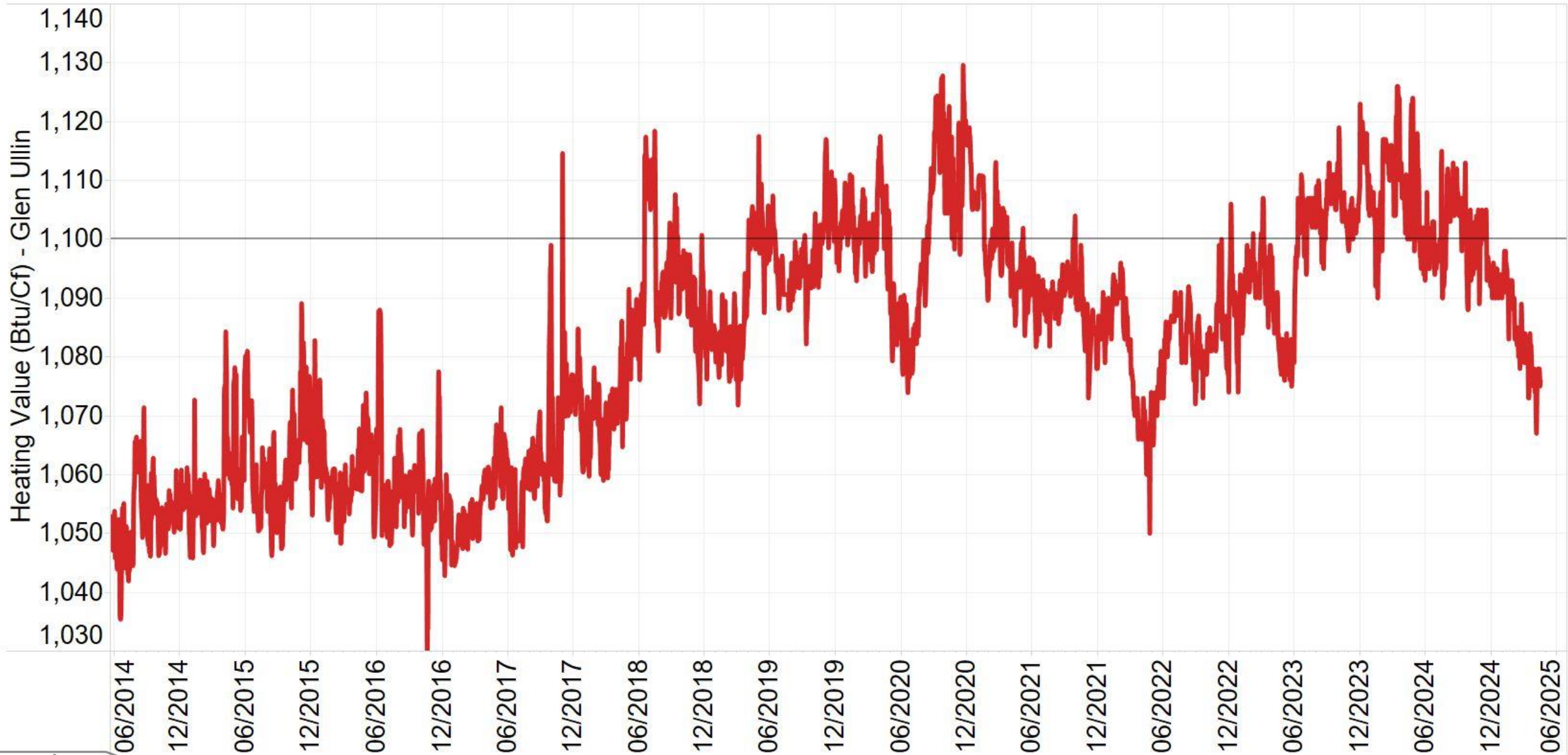
Major Residue Gas Pipeline Infrastructure



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 2 (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



Phase 1 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 10yrs or Longer

Phase 1 Estimated Rates

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

Phase 2 Project Highlights

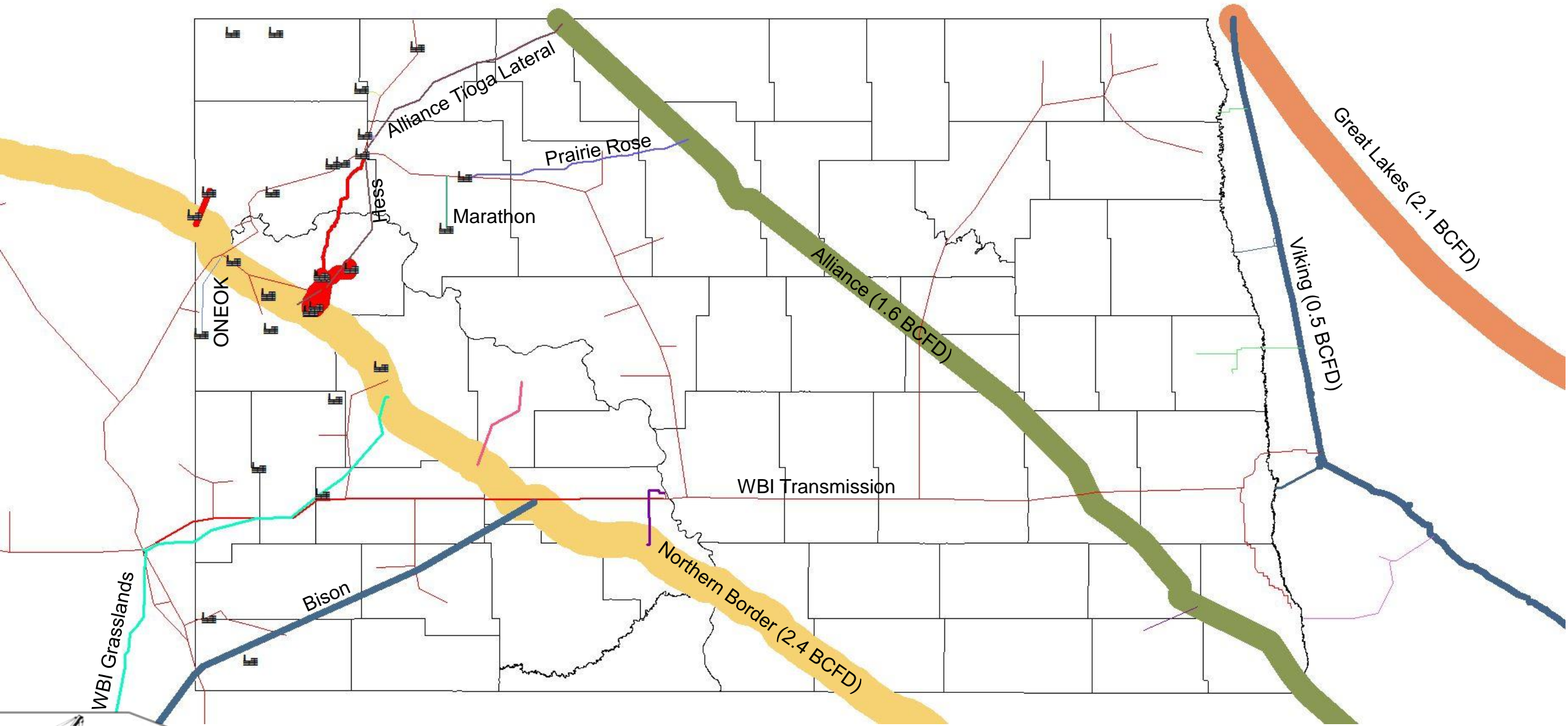
- Non-binding open season Apr 17 – May 23, 2025
- 208 Miles: 30" Pipe
- Proposed Capacity 430,000 Dth/Day
- January 2030 targeted in-service
- Seeking commitments 10yrs or Longer

Phase 2 Estimated Rates

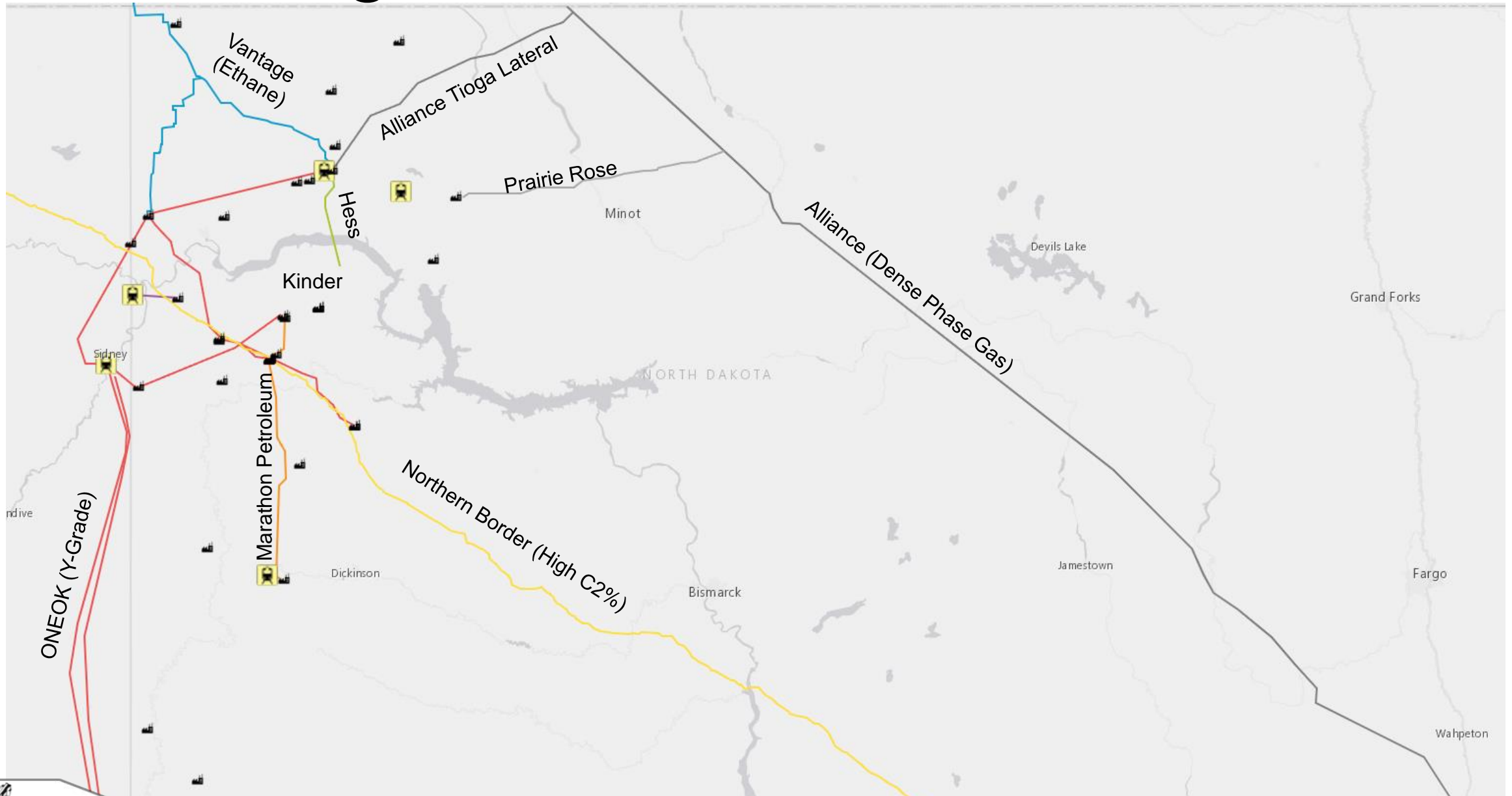
- \$0.80/Dth + Fuel/Electric/Commodity
- Anchor Shipper Minimum: 100,000 Dth/Day
- Foundation Shipper Minimum: 250,000 Dth/Day



Residue Gas Pipeline Capacity Visualization



Regional NGL Infrastructure



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