

Pipeline Authority Monthly Update

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June 24, 2025



US Williston Basin Oil Production - 2025

MONTH	ND	Eastern MT*	SD	TOTAL
January	1,175,117	74,623	2,281	1,252,021
February	1,165,405	71,303	2,282	1,238,990
March	1,193,397	75,521	2,272	1,271,190
April	1,171,730			
May				
June				
July				
August				
September				
October				
November				
December				

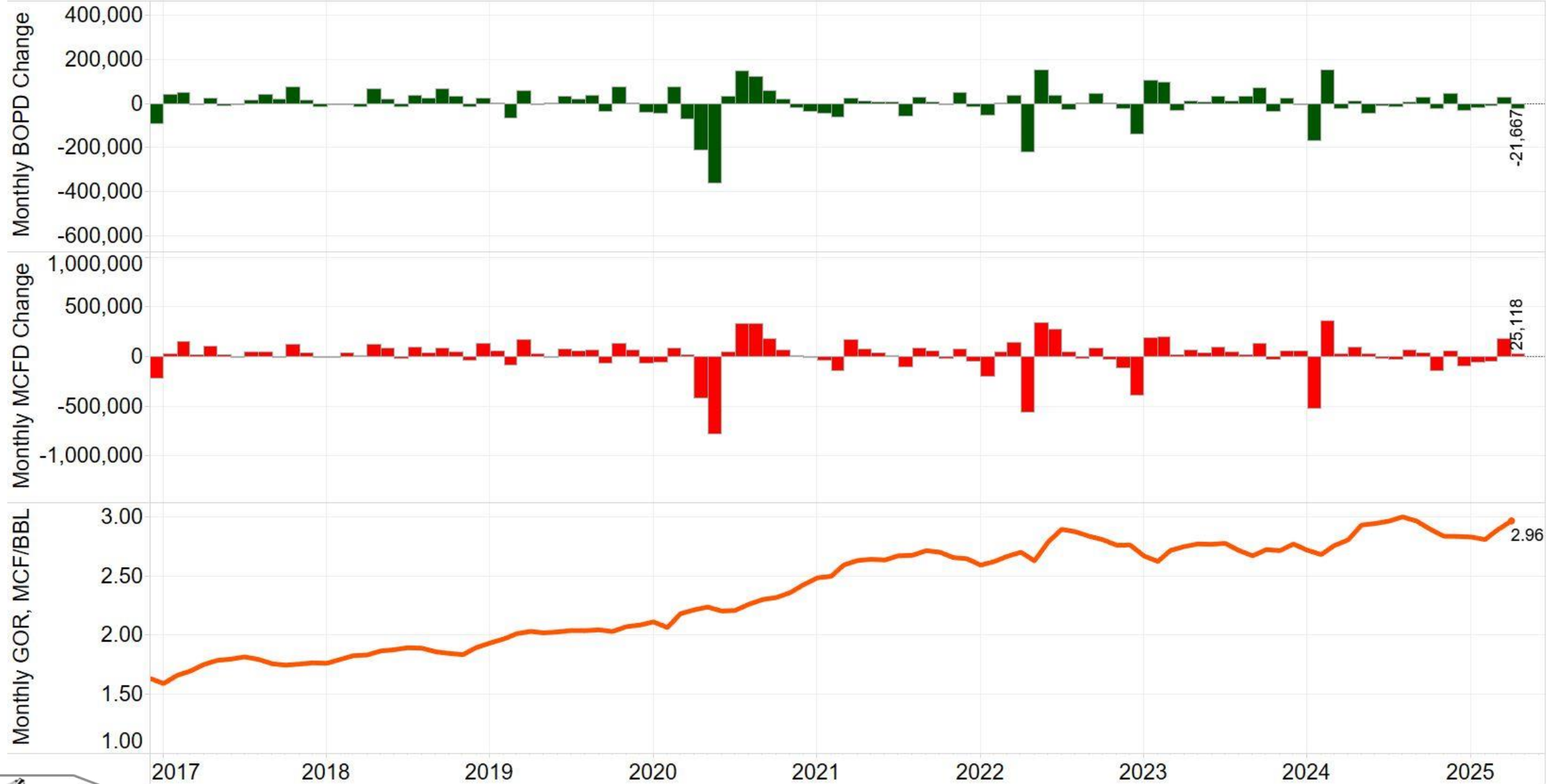


US Williston Basin Oil Production - 2024

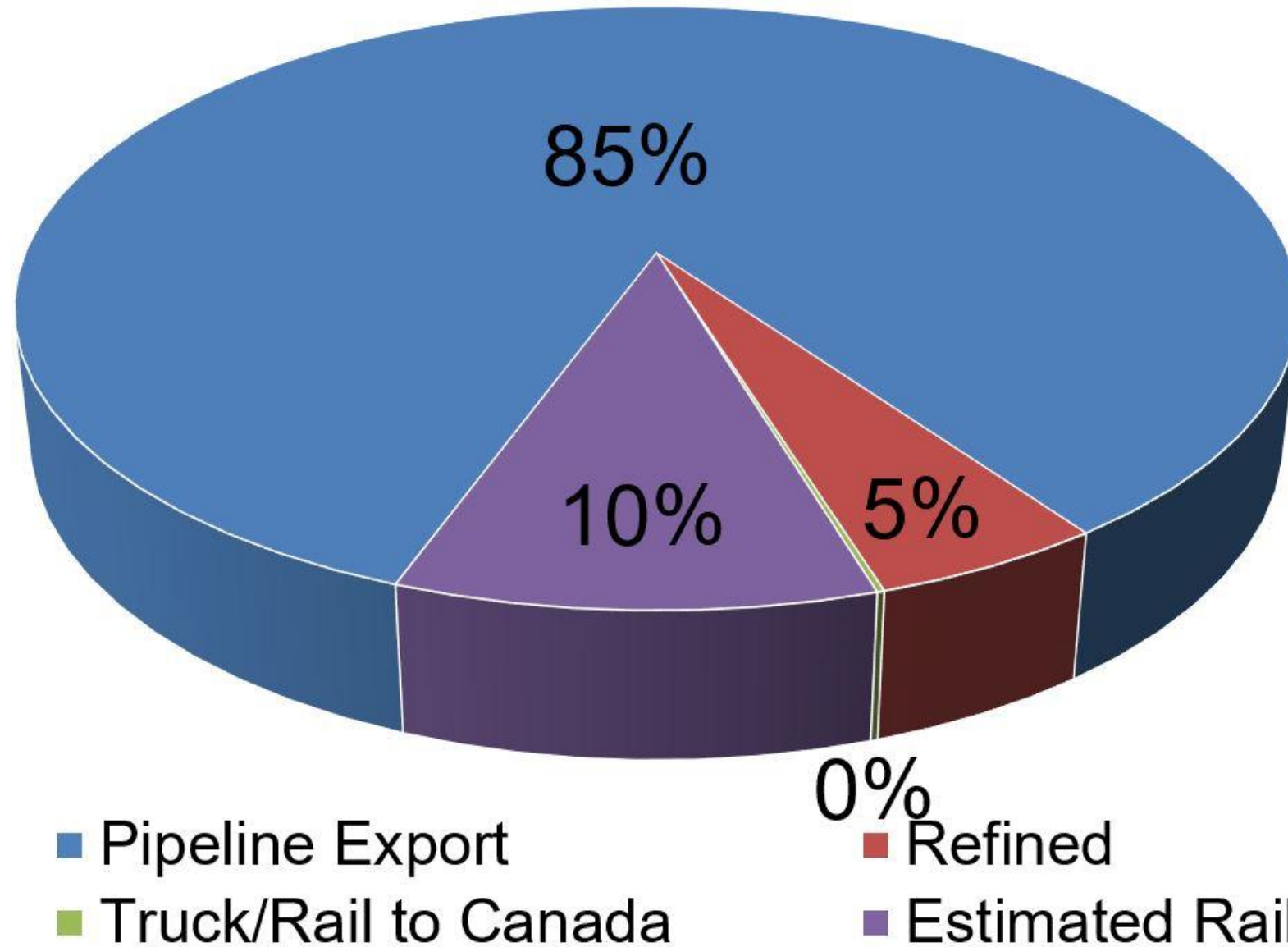
MONTH	ND	Eastern MT*	SD	TOTAL
January	1,105,208	59,306	2,312	1,166,825
February	1,256,126	66,332	2,412	1,324,870
March	1,231,474	70,690	2,590	1,304,754
April	1,243,018	72,392	2,430	1,317,840
May	1,198,803	72,636	2,349	1,273,788
June	1,186,409	71,586	2,370	1,260,365
July	1,169,457	69,481	2,329	1,241,267
August	1,176,696	75,923	2,349	1,254,968
September	1,203,157	74,891	2,326	1,280,374
October	1,180,995	78,511	2,487	1,261,993
November	1,225,297	83,169	2,265	1,310,731
December	1,191,291	76,546	2,246	1,270,083



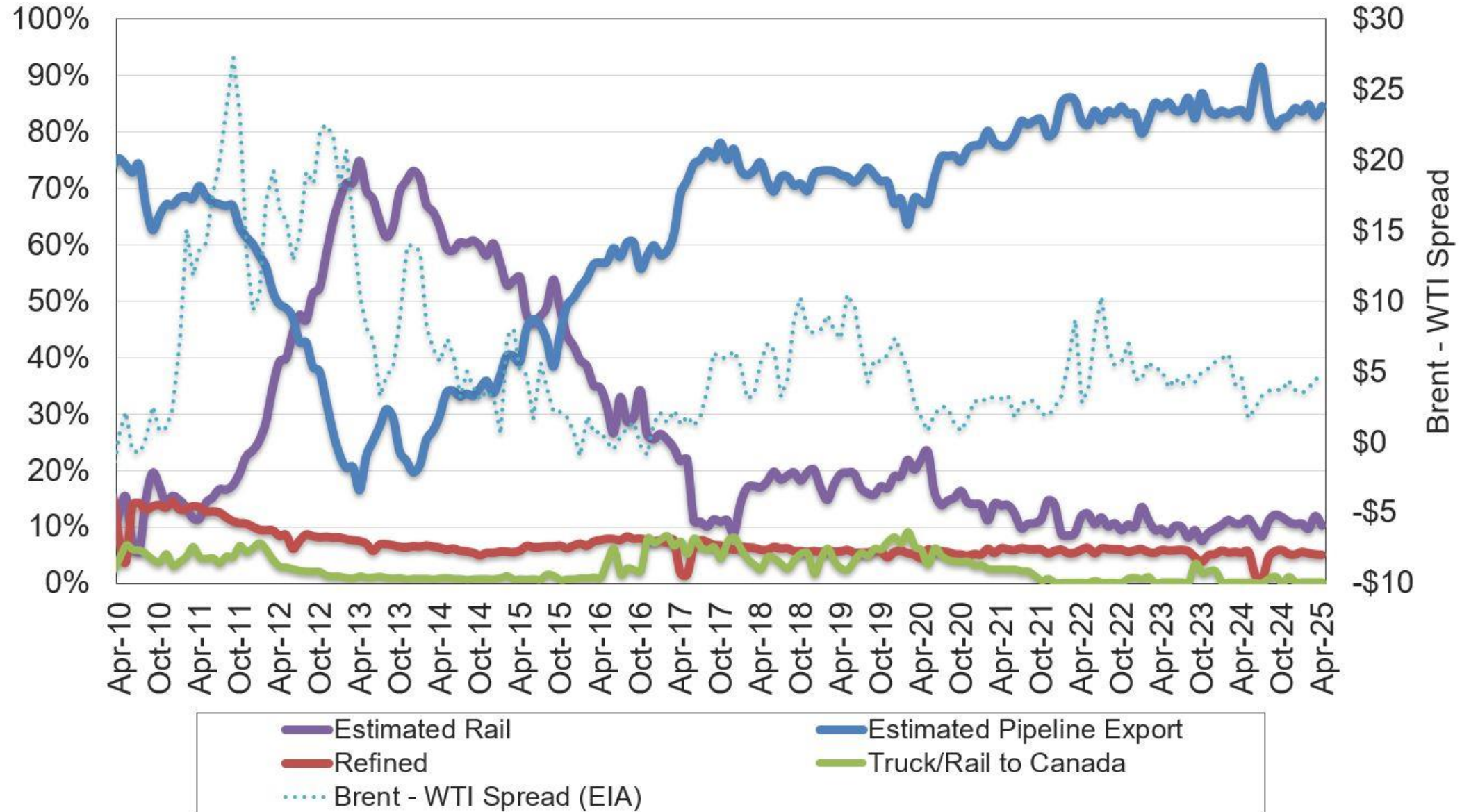
North Dakota Monthly Production Change



Estimated Williston Basin Oil Transportation



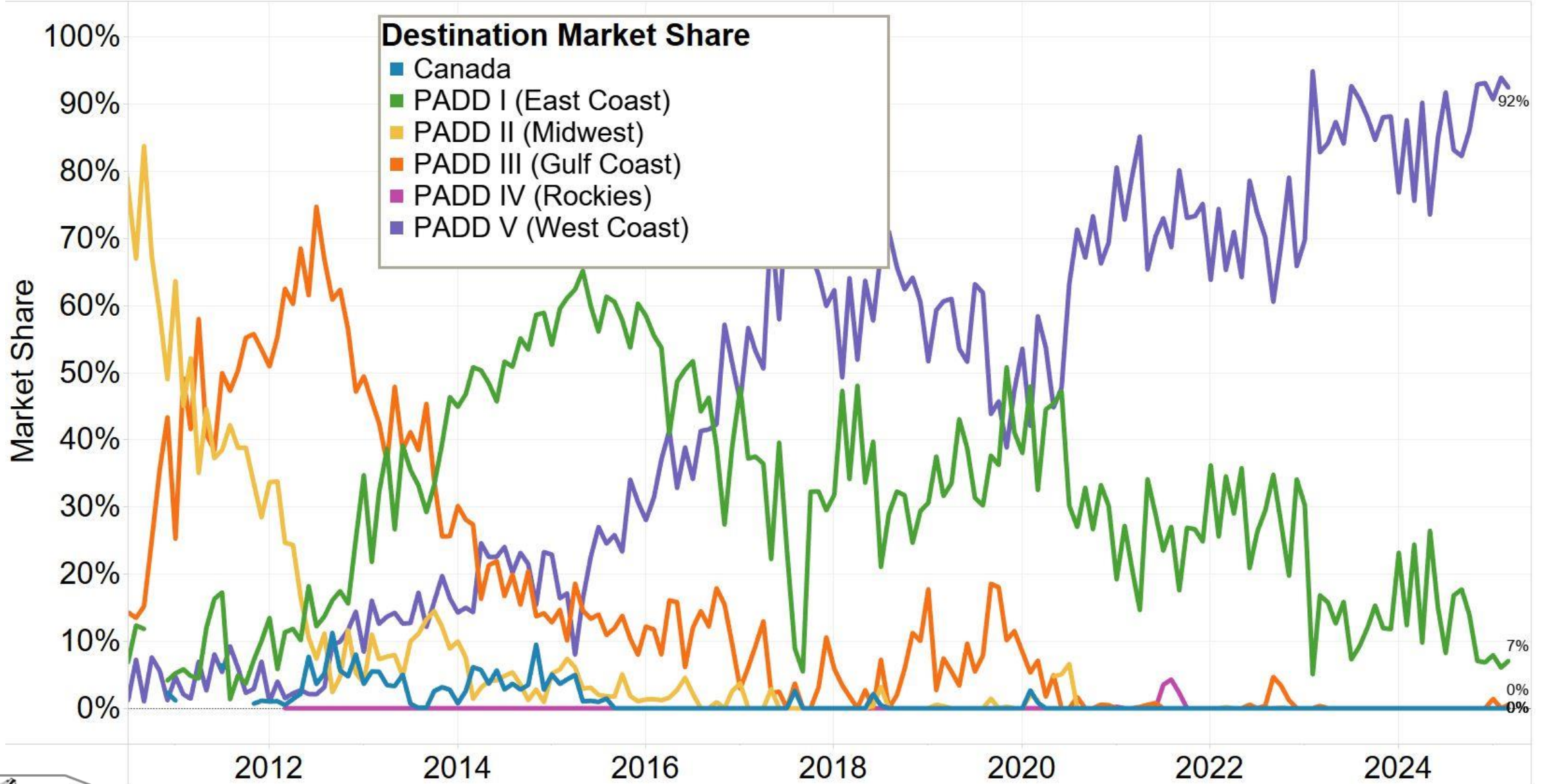
Estimated Williston Basin Oil Transportation



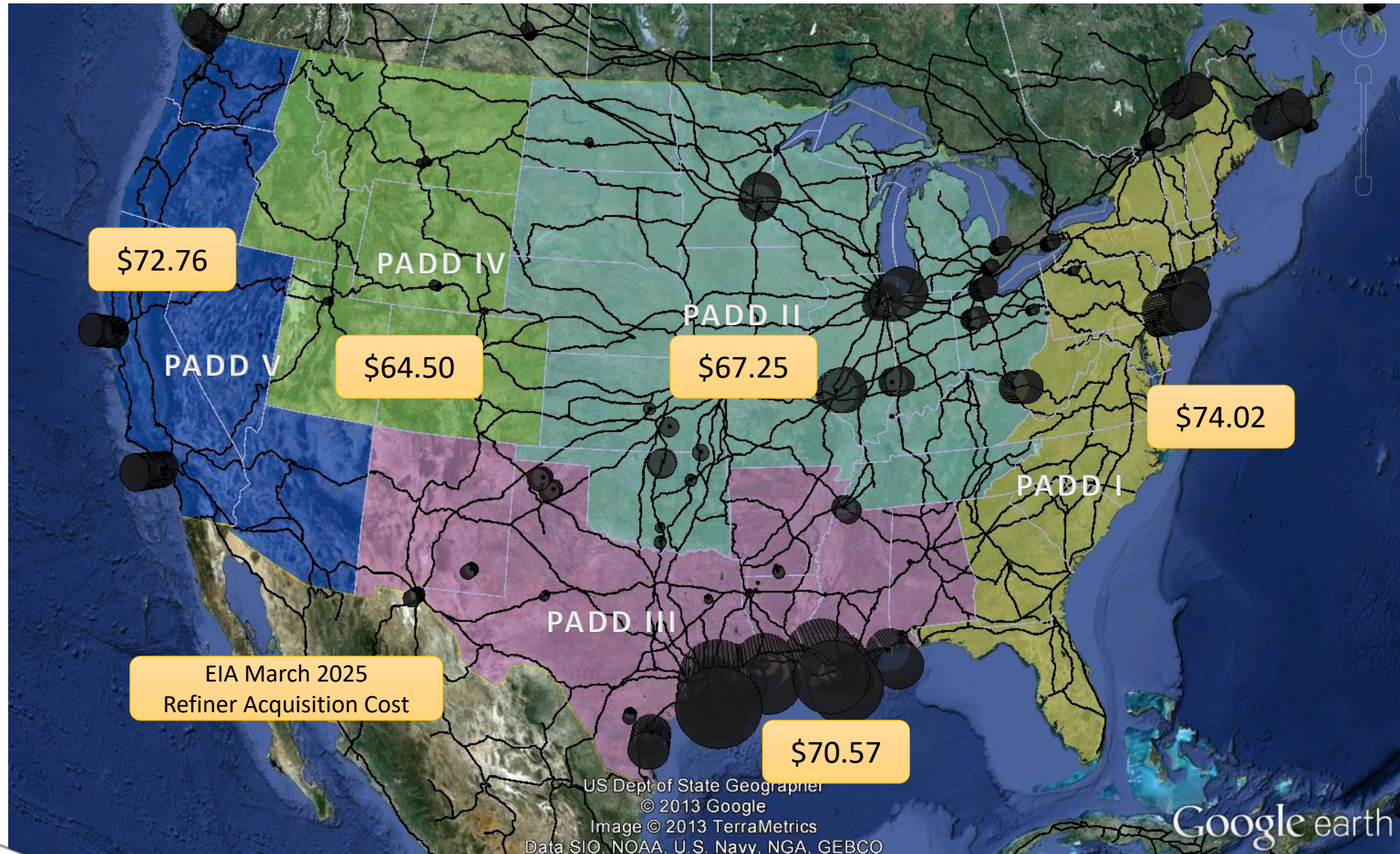
Estimated ND Rail Export Volumes



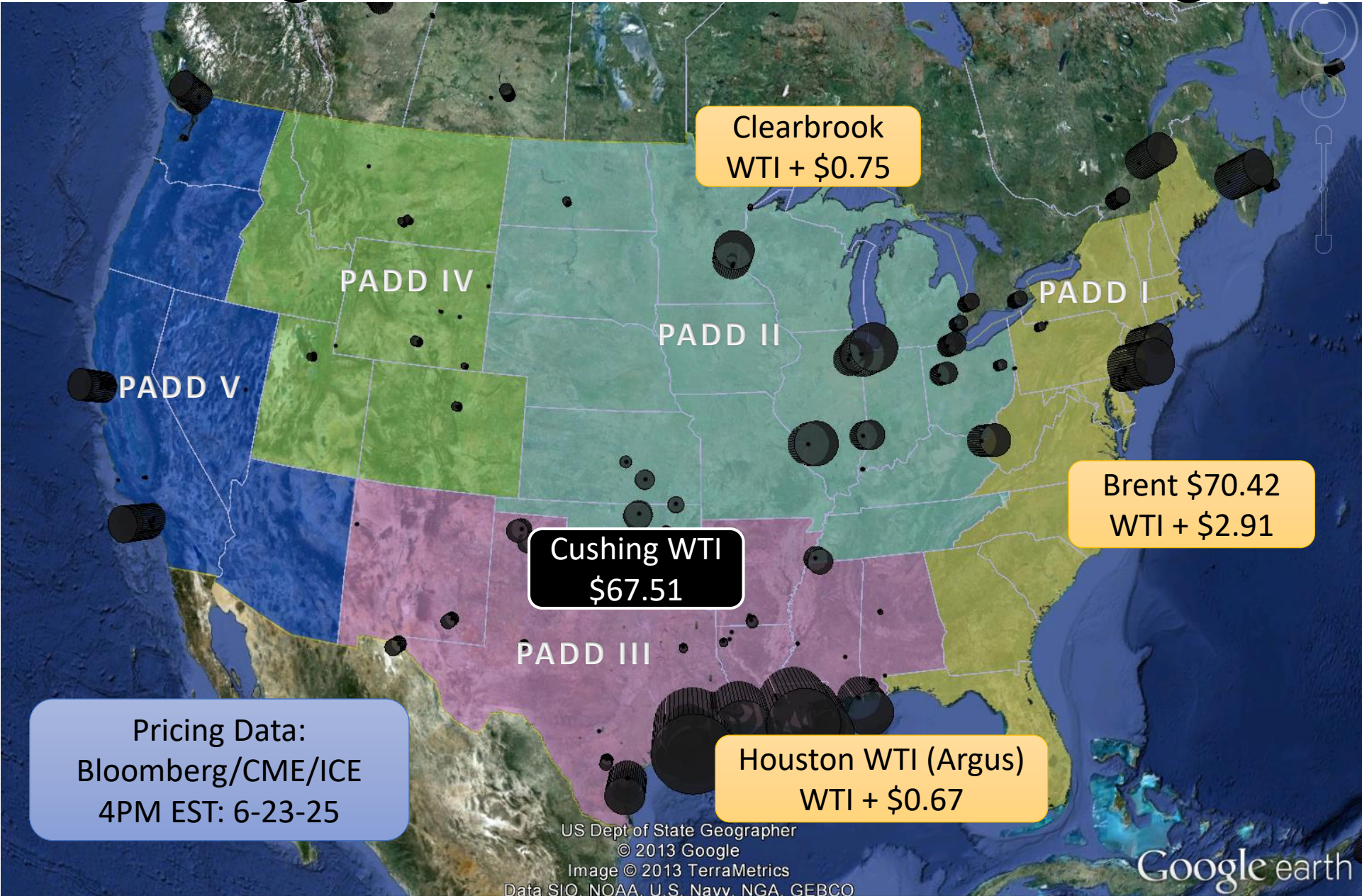
Rail Destinations Market Share (March 2025)



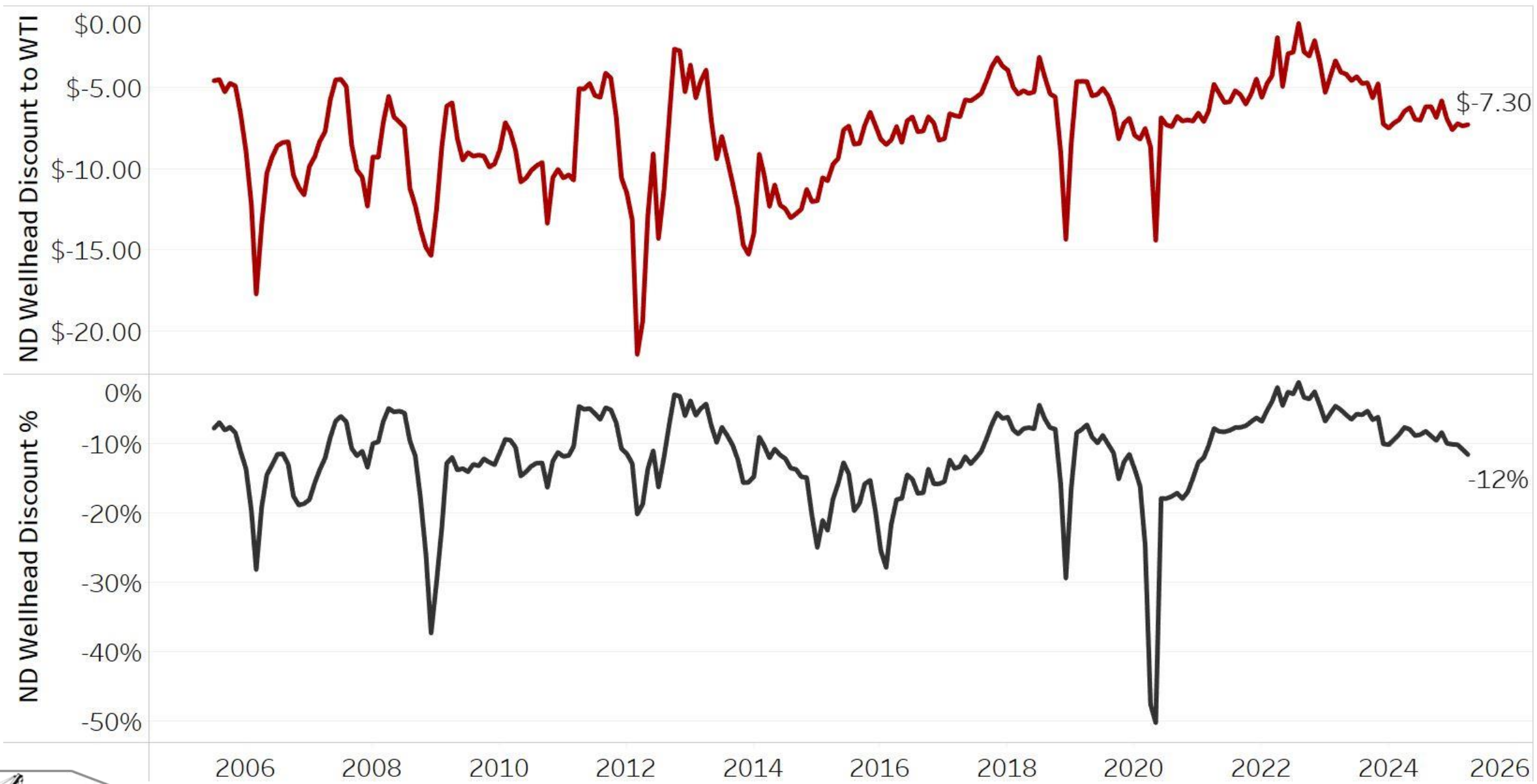
Major Rail Lines and Refineries



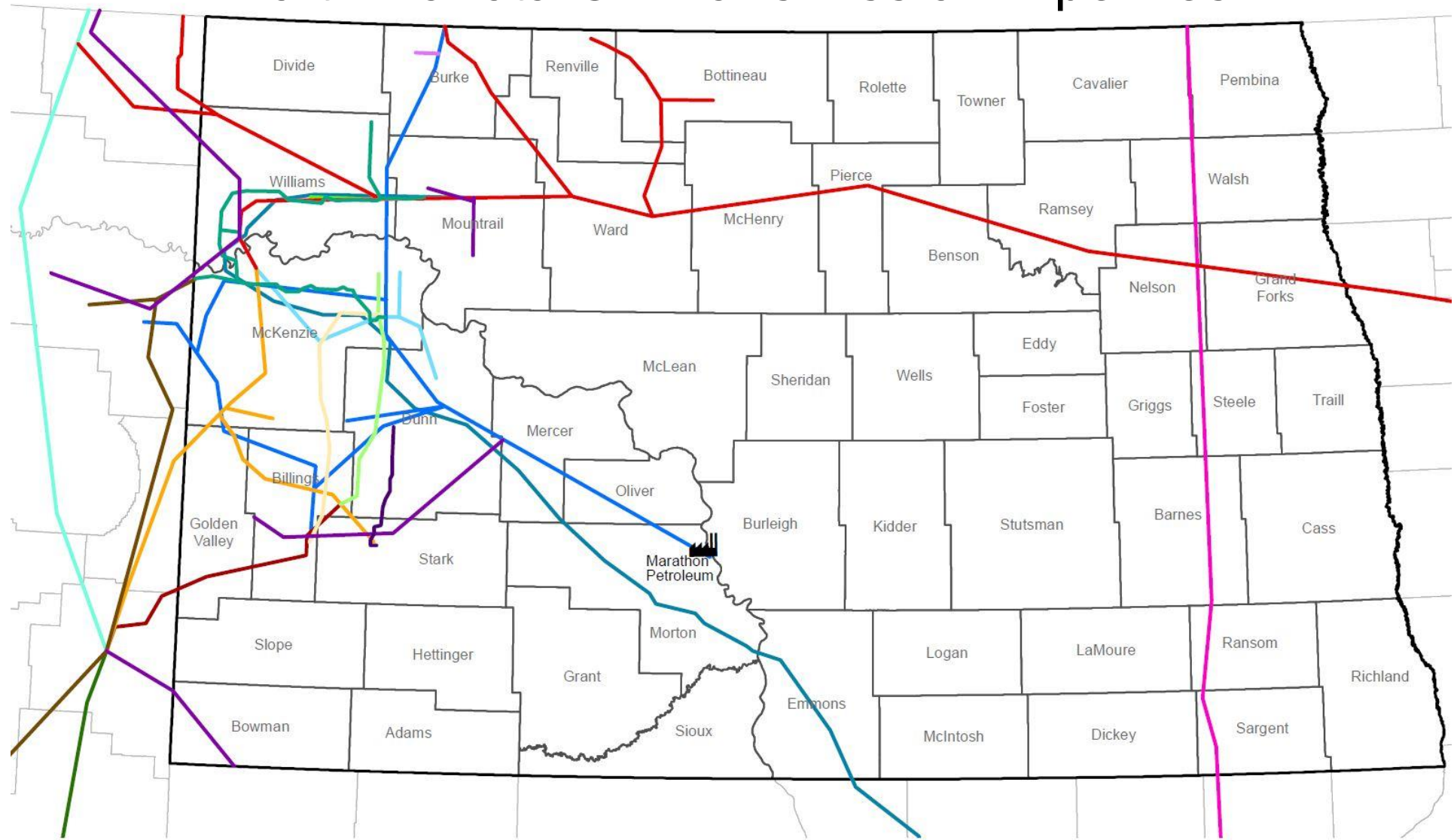
Major Pricing Benchmarks & Refining Centers



Average North Dakota Oil “Discount” to WTI



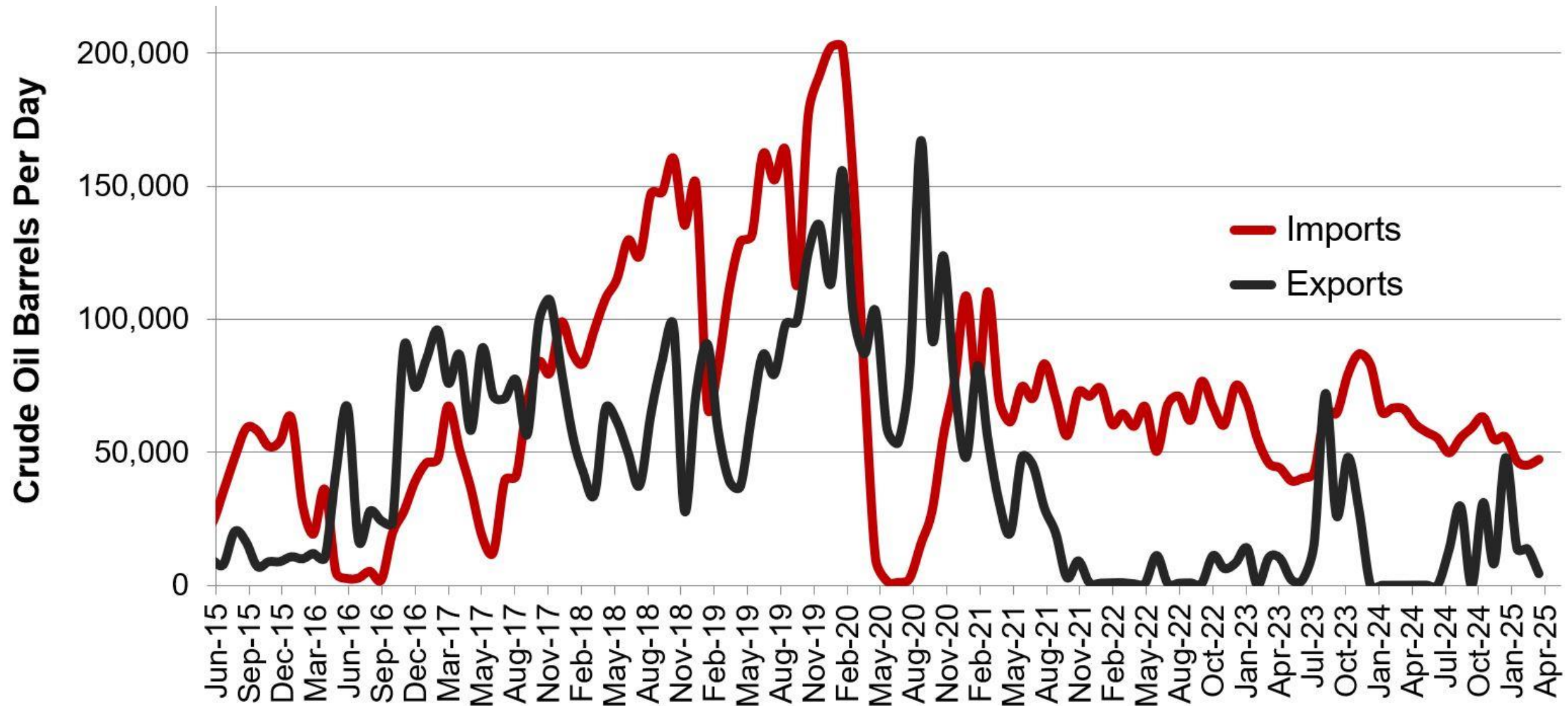
North Dakota Oil Transmission Pipelines



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



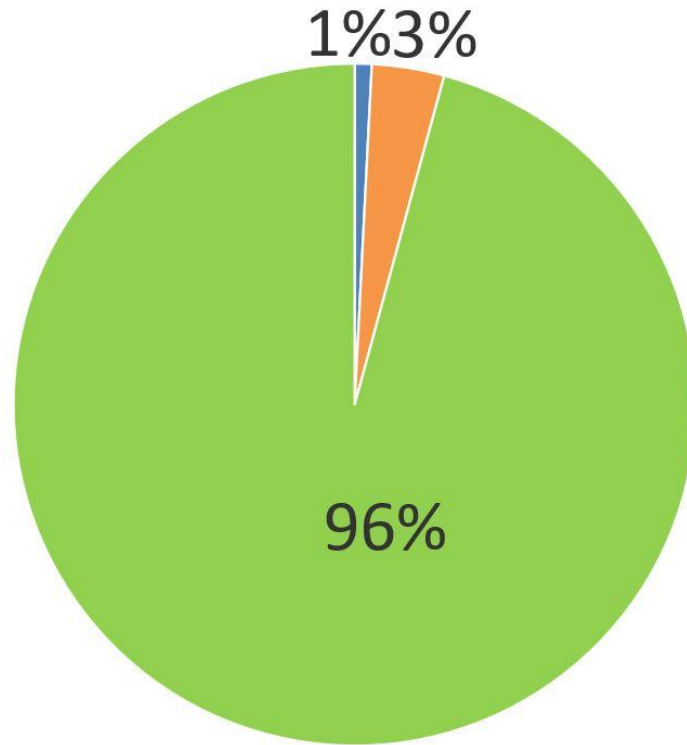
Williston Basin Truck/Rail Imports and Exports with Canada



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.

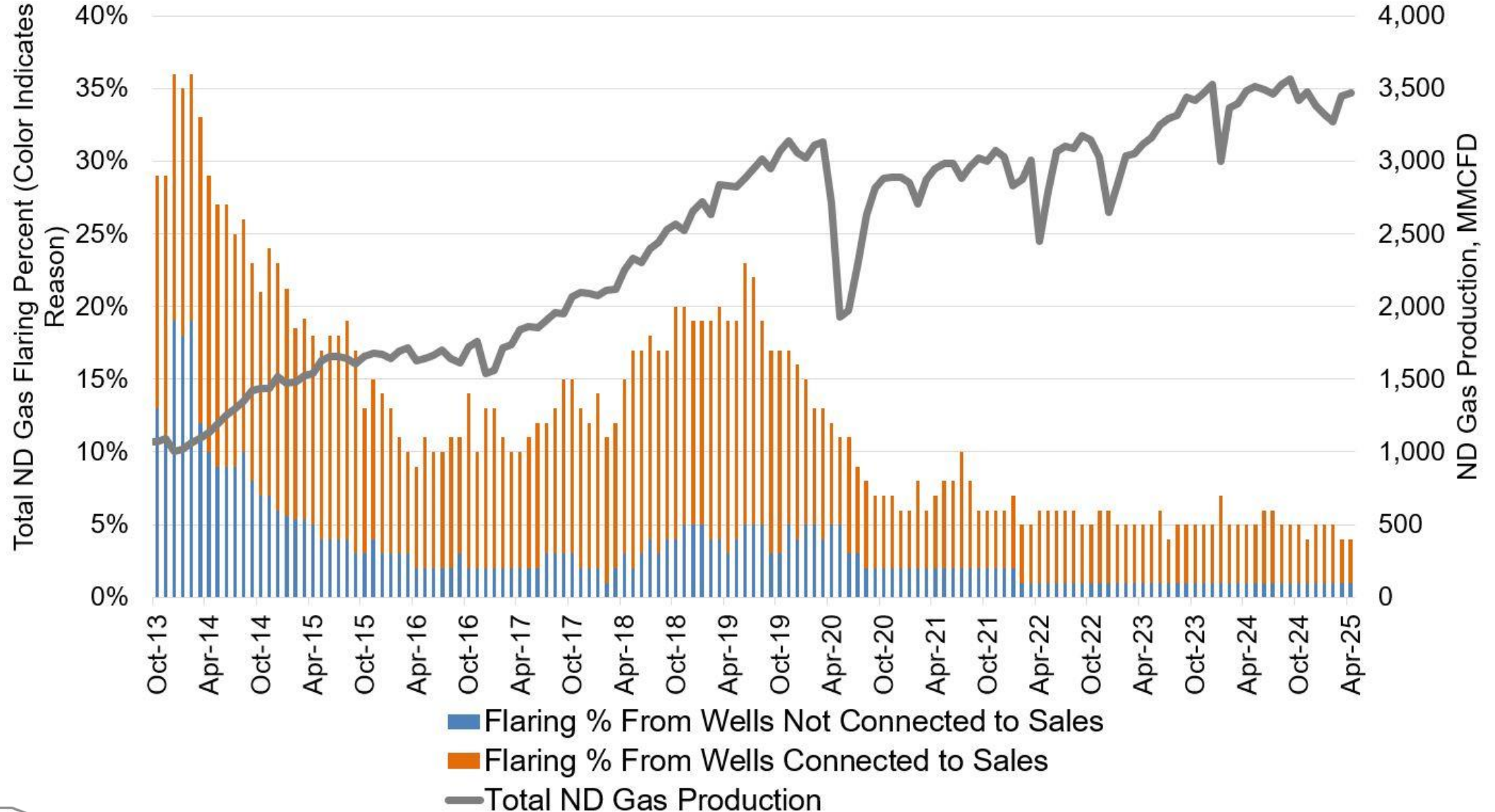
Simple Terms

Blue – Lack of pipelines
Orange – Challenges on existing infrastructure

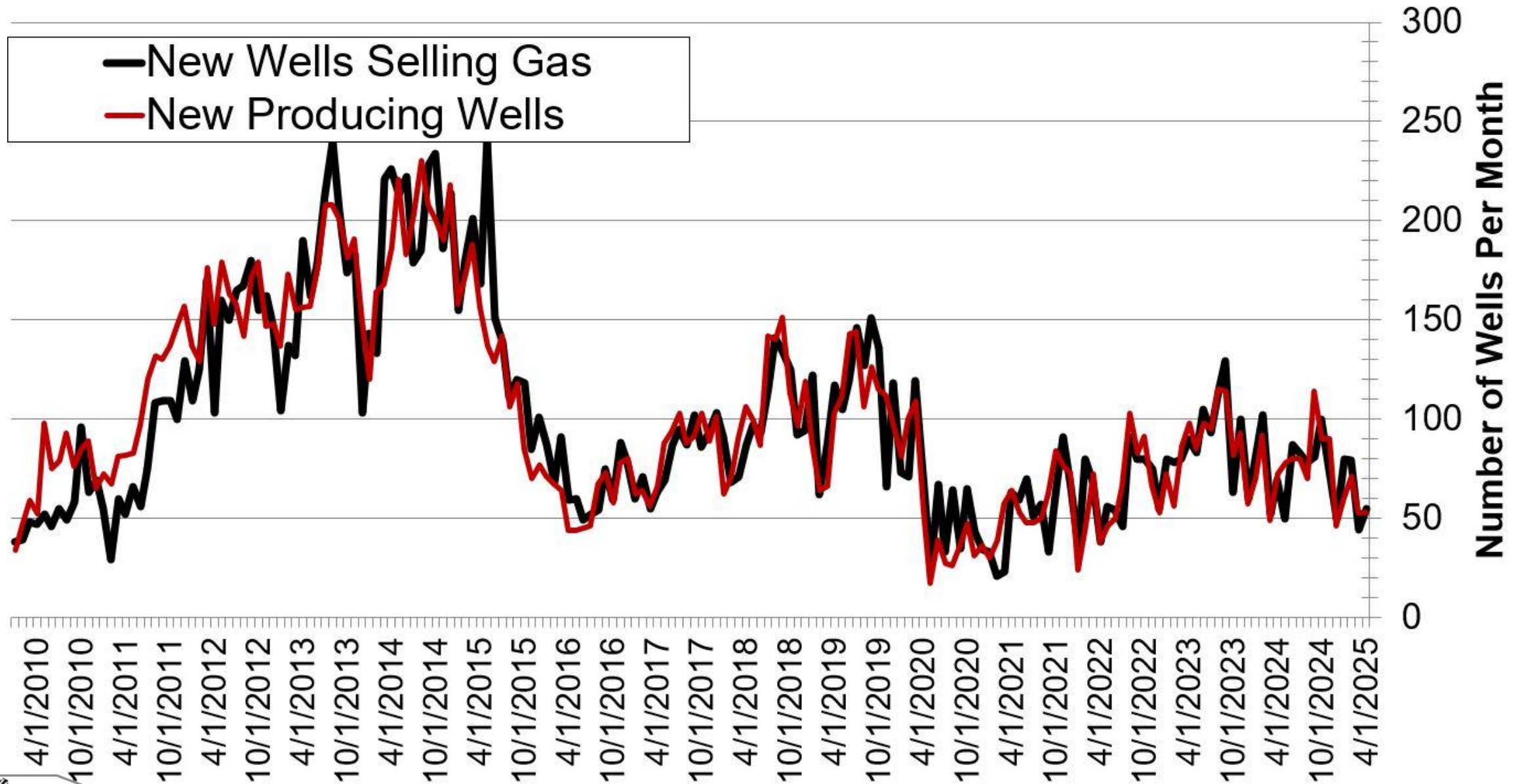
April 2025 Data – Non-Confidential Wells



Solving the Flaring Challenge

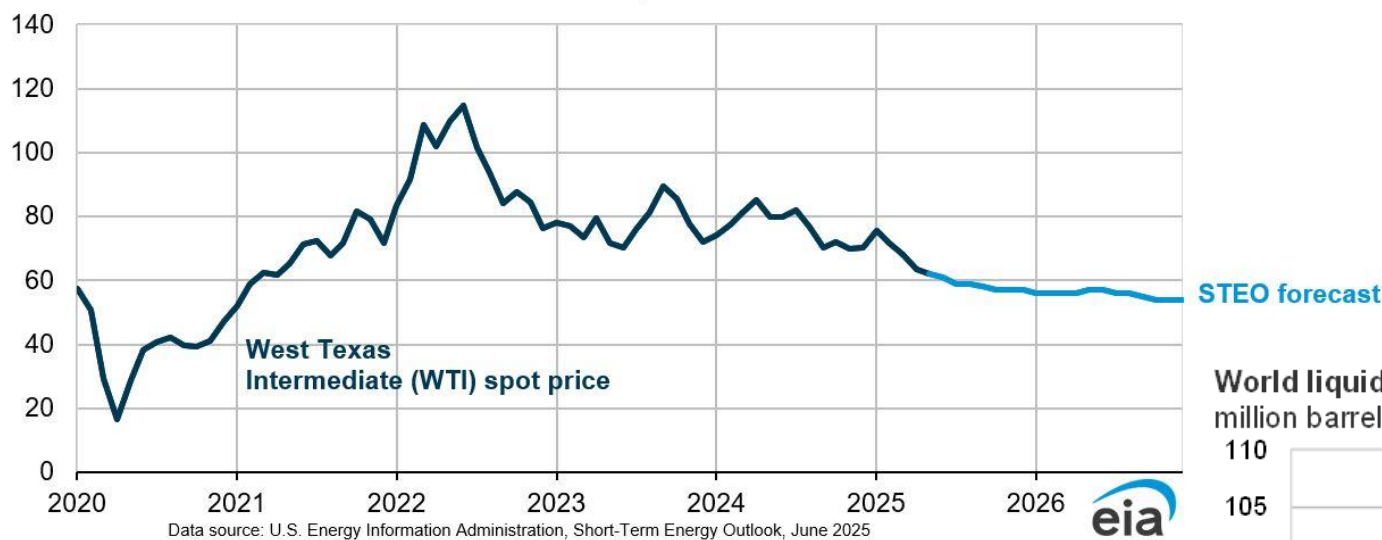


Solving the Flaring Challenge

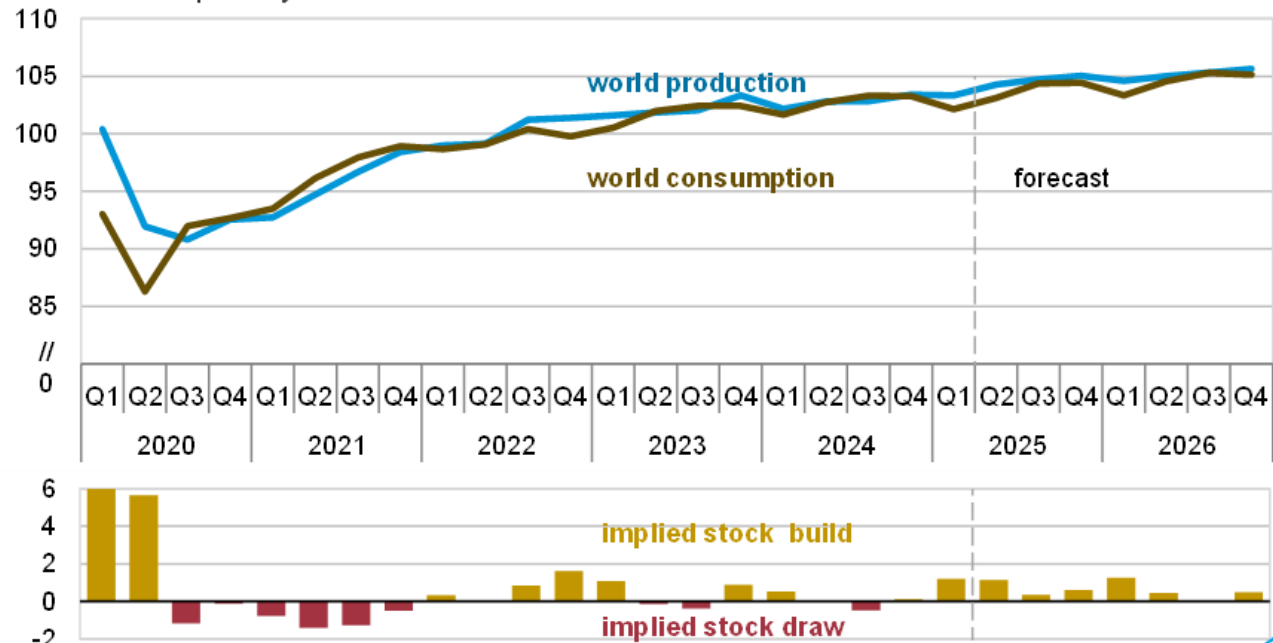


EIA Oil Price Outlook (June 2025)

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



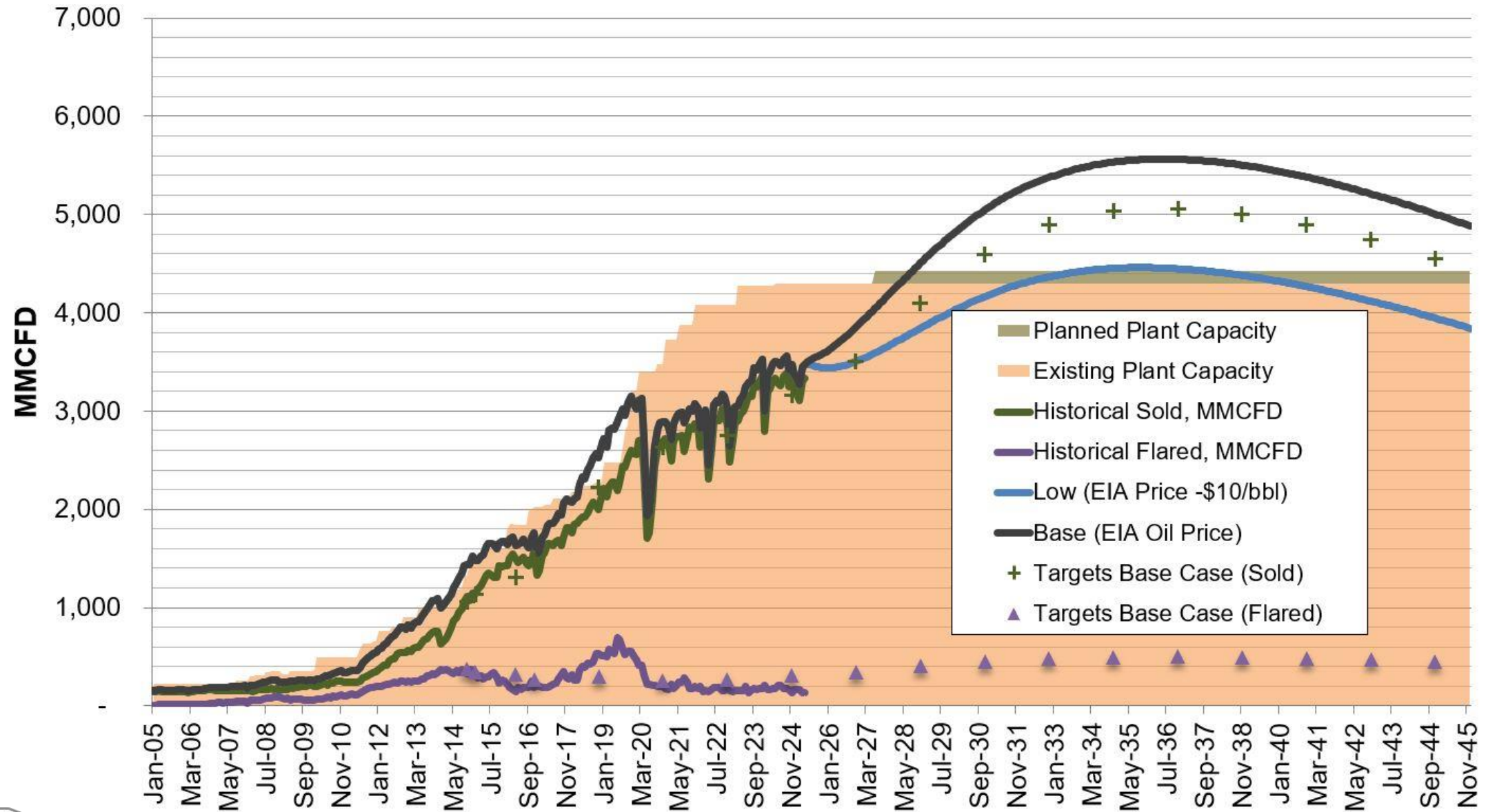
World liquid fuels production and consumption balance
million barrels per day



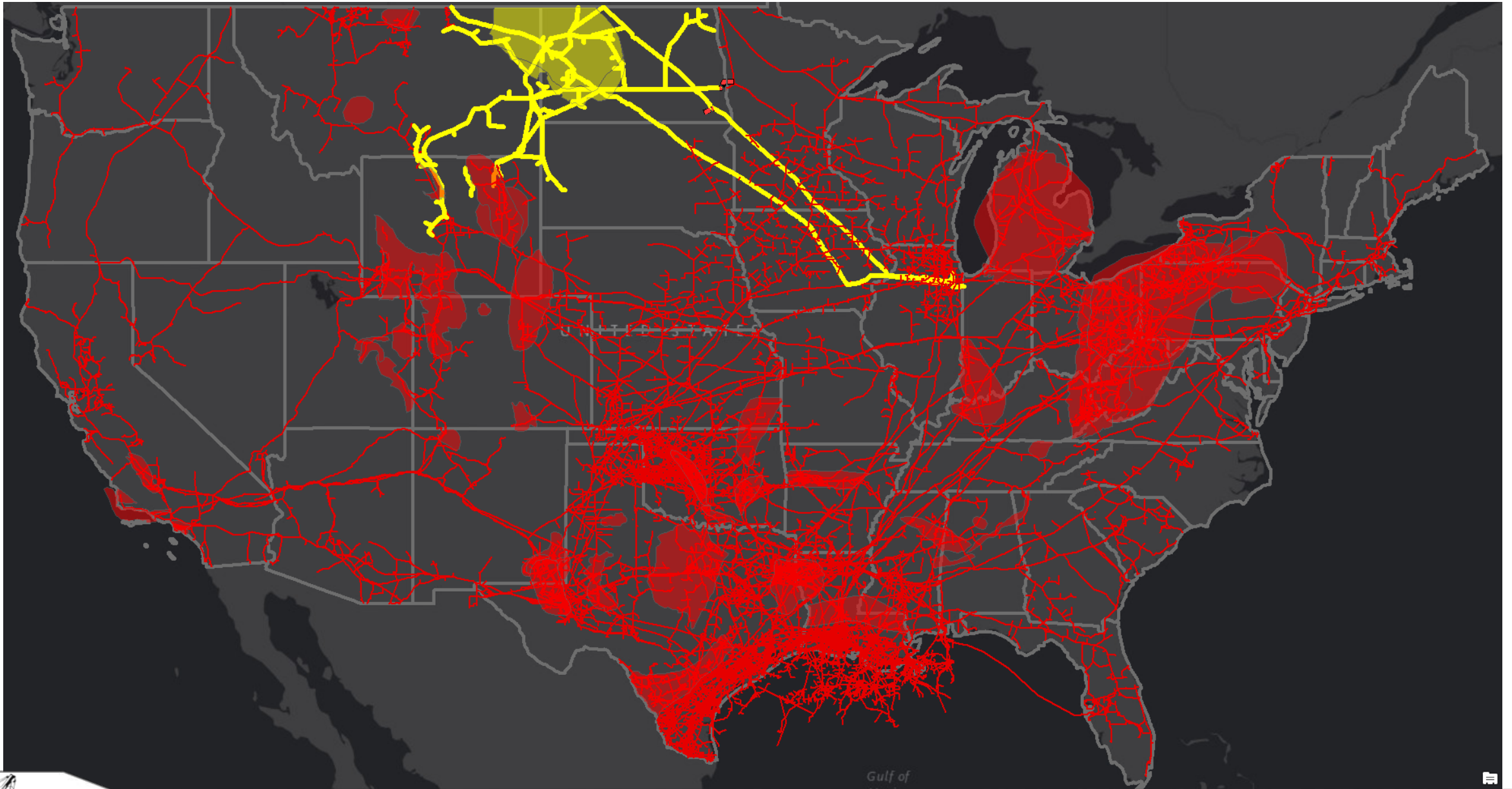
Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, June 2025



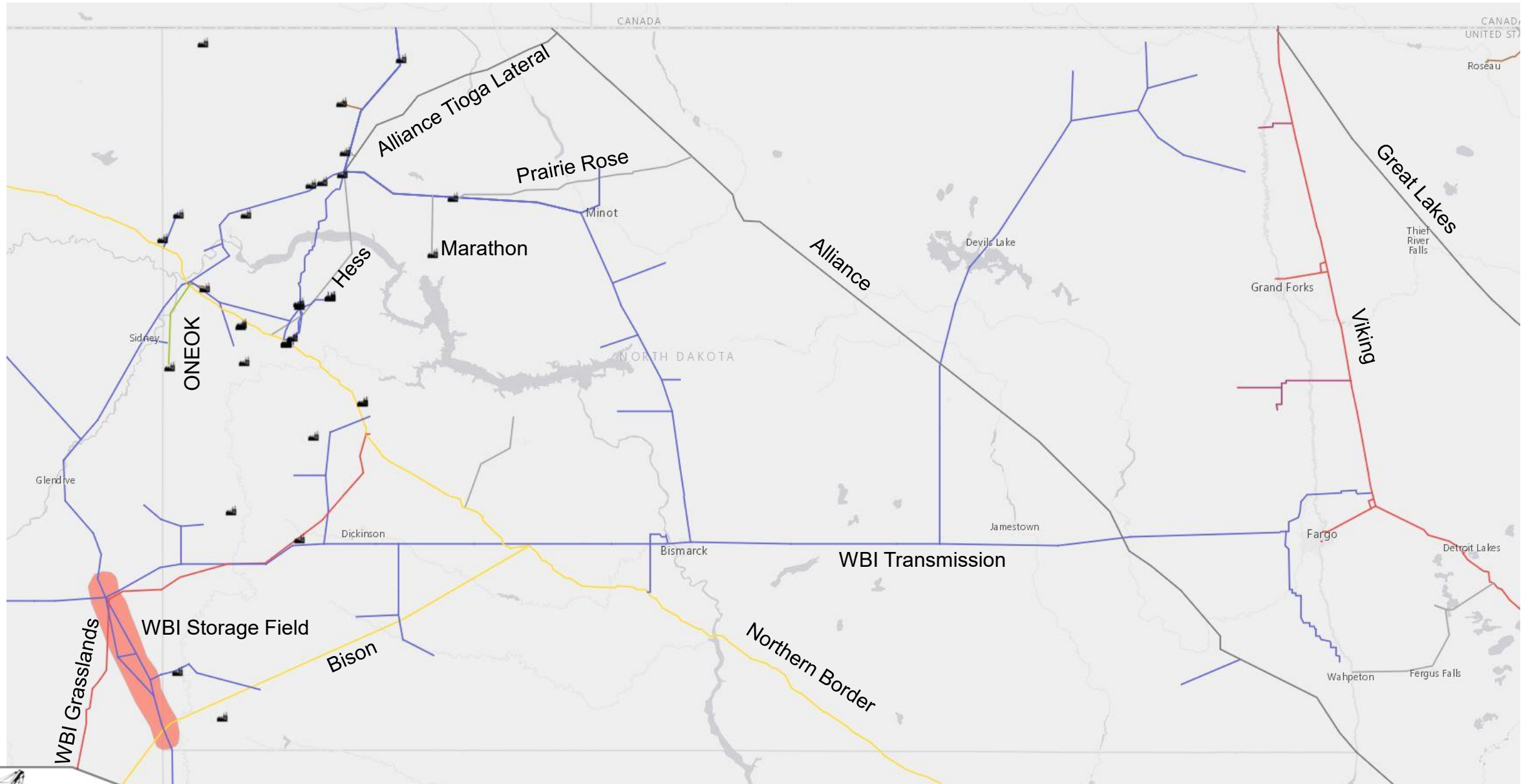
North Dakota Gas Processing Outlook



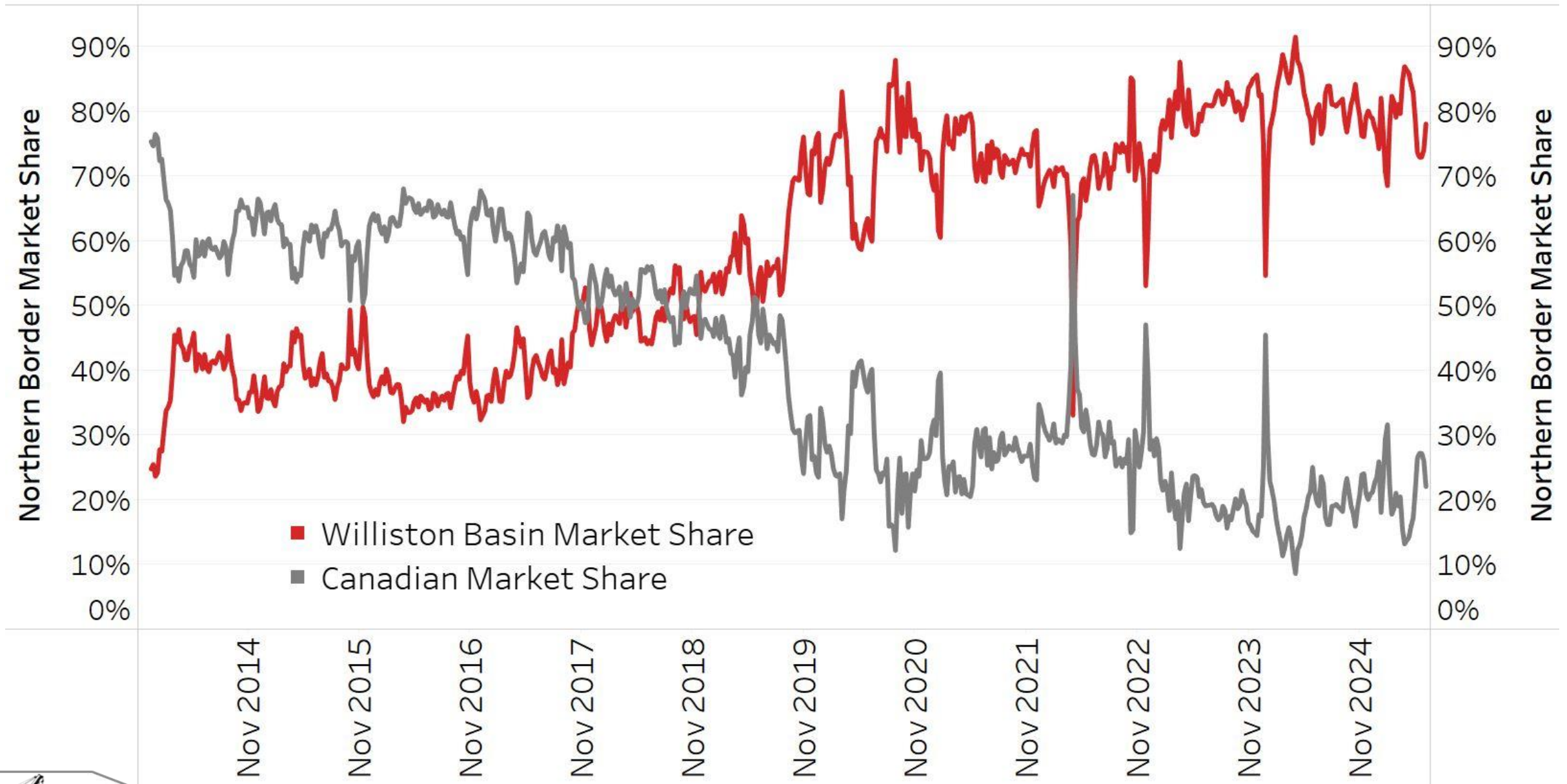
Bakken Natural Gas Infrastructure



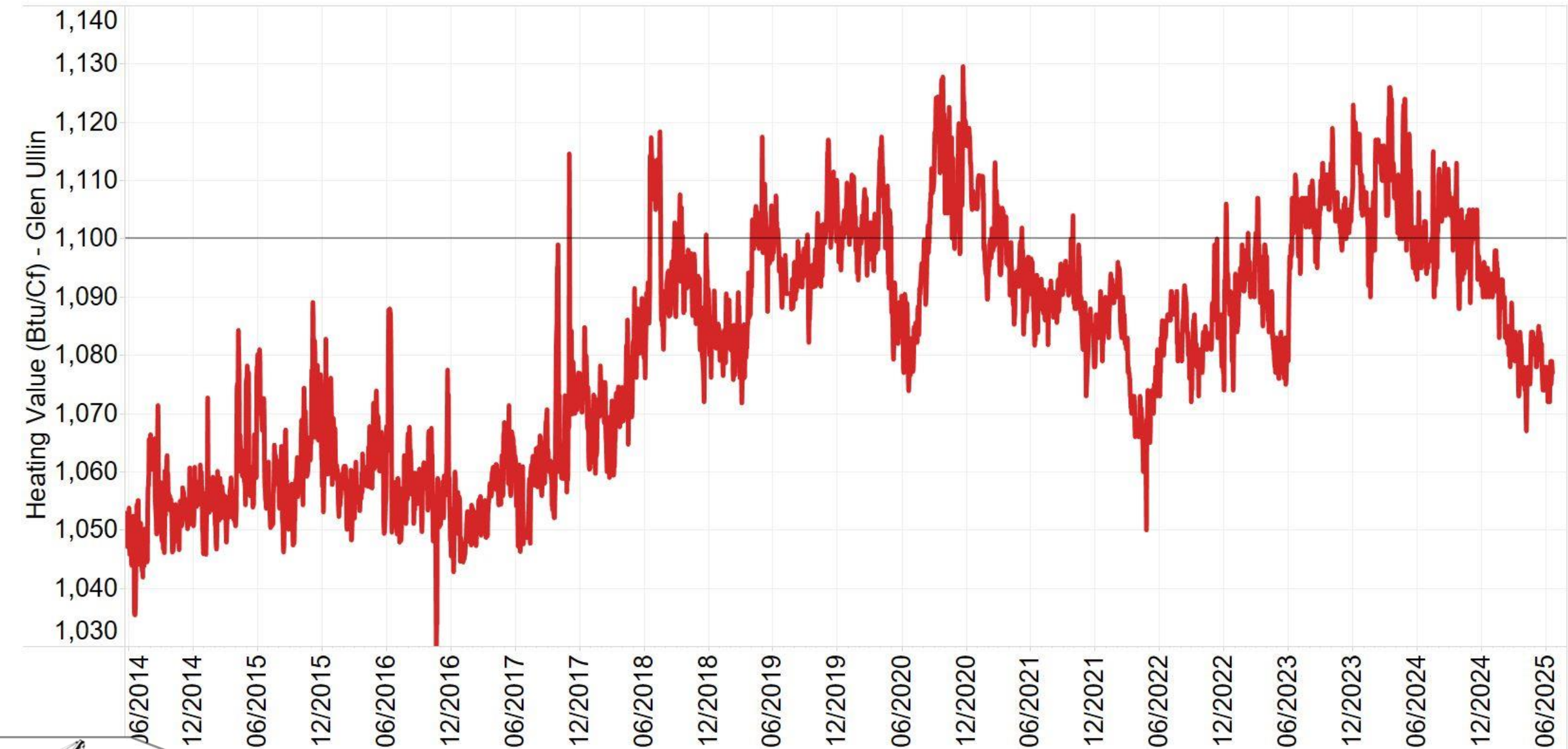
Major Residue Gas Pipeline Infrastructure



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

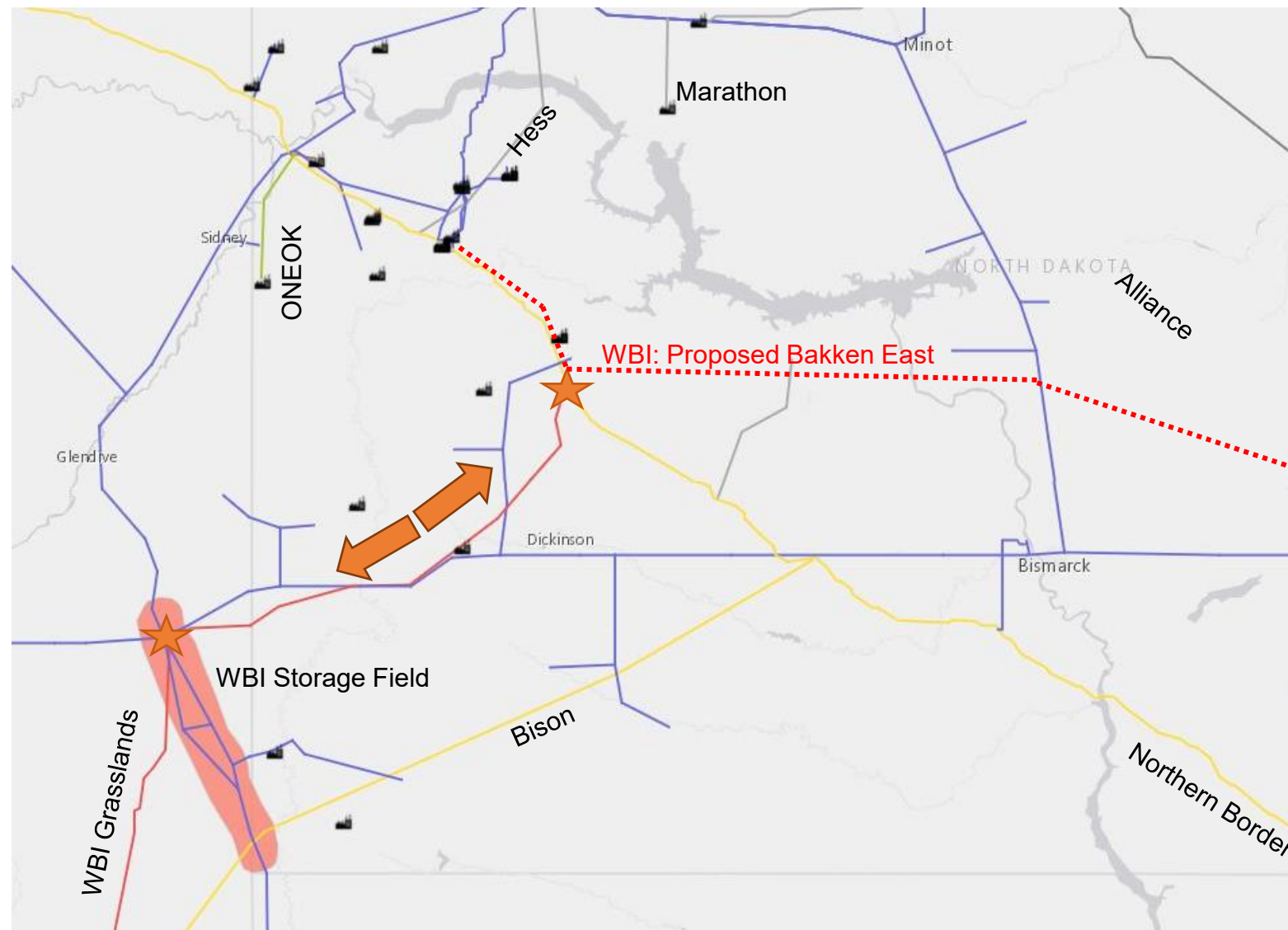
- Non-binding open season Apr 17 – May 23, 2025
- 208 Miles: 30" Pipe
- Proposed Capacity 430,000 Dth/Day
- January 2030 targeted in-service
- Seeking commitments 10yrs or Longer

Phase 2 Estimated Rates

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



WBI Energy Open Season: Storage/Pipe Enhancement



Firm Transportation Project Highlights

- Non-binding open season Apr 21 – May 20, 2025
- Pipeline expansion: 72,000 Dth/Day
- Oct 2029 targeted in-service
- Seeking commitments 15yrs or longer
- Pipe looping and new/upgraded compression

Estimated Rates (+Fuel/Elec/Commodity)

- Capacity reservation: \$0.58156/Dth

Storage Project Highlights

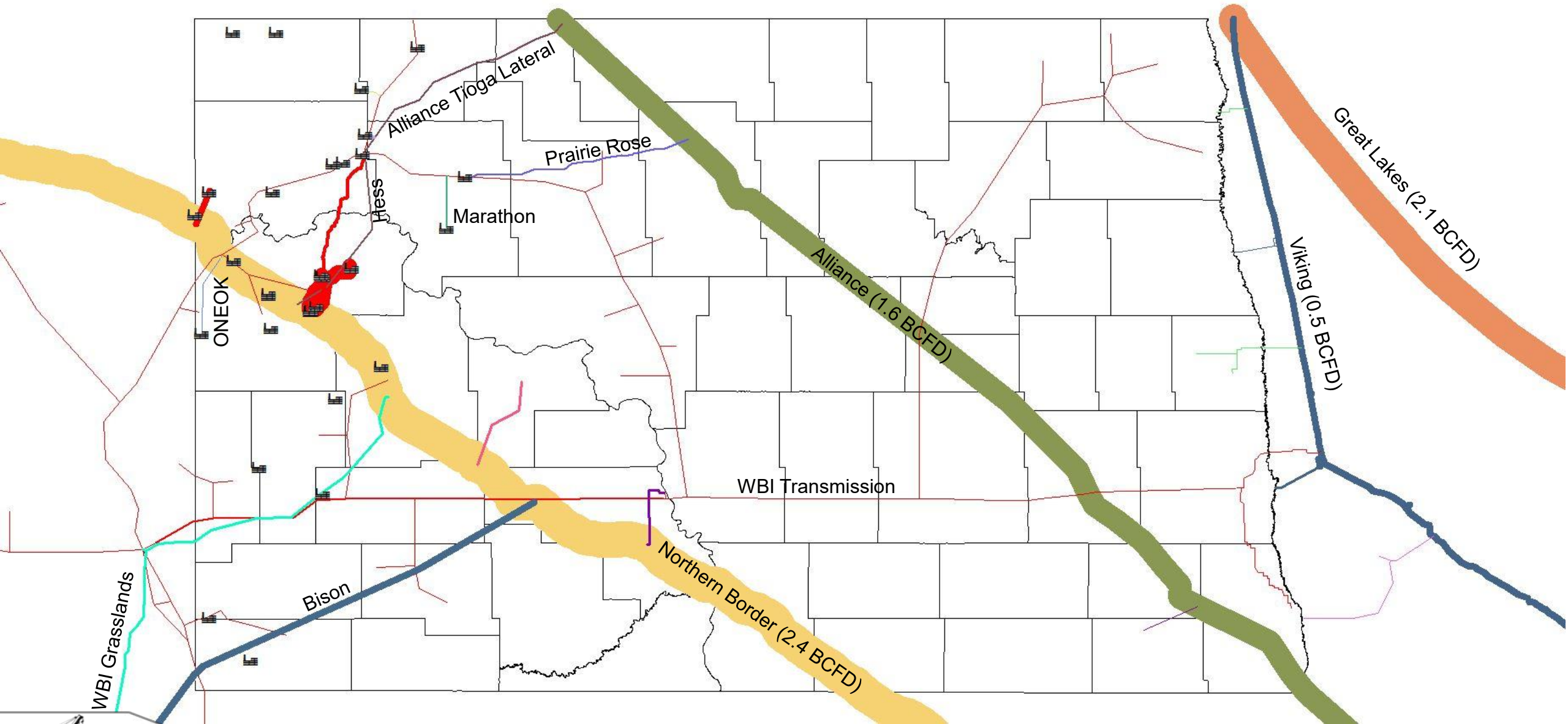
- Non-binding open season Apr 21 – May 20, 2025
- Deliverability expansion: 72,000 Dth/Day
- Up to ~10 BCF total of new seasonal service
- Oct 2029 targeted in-service
- Seeking commitments 15yrs or longer

Estimated Rates (+Fuel/Elec/Commodity)

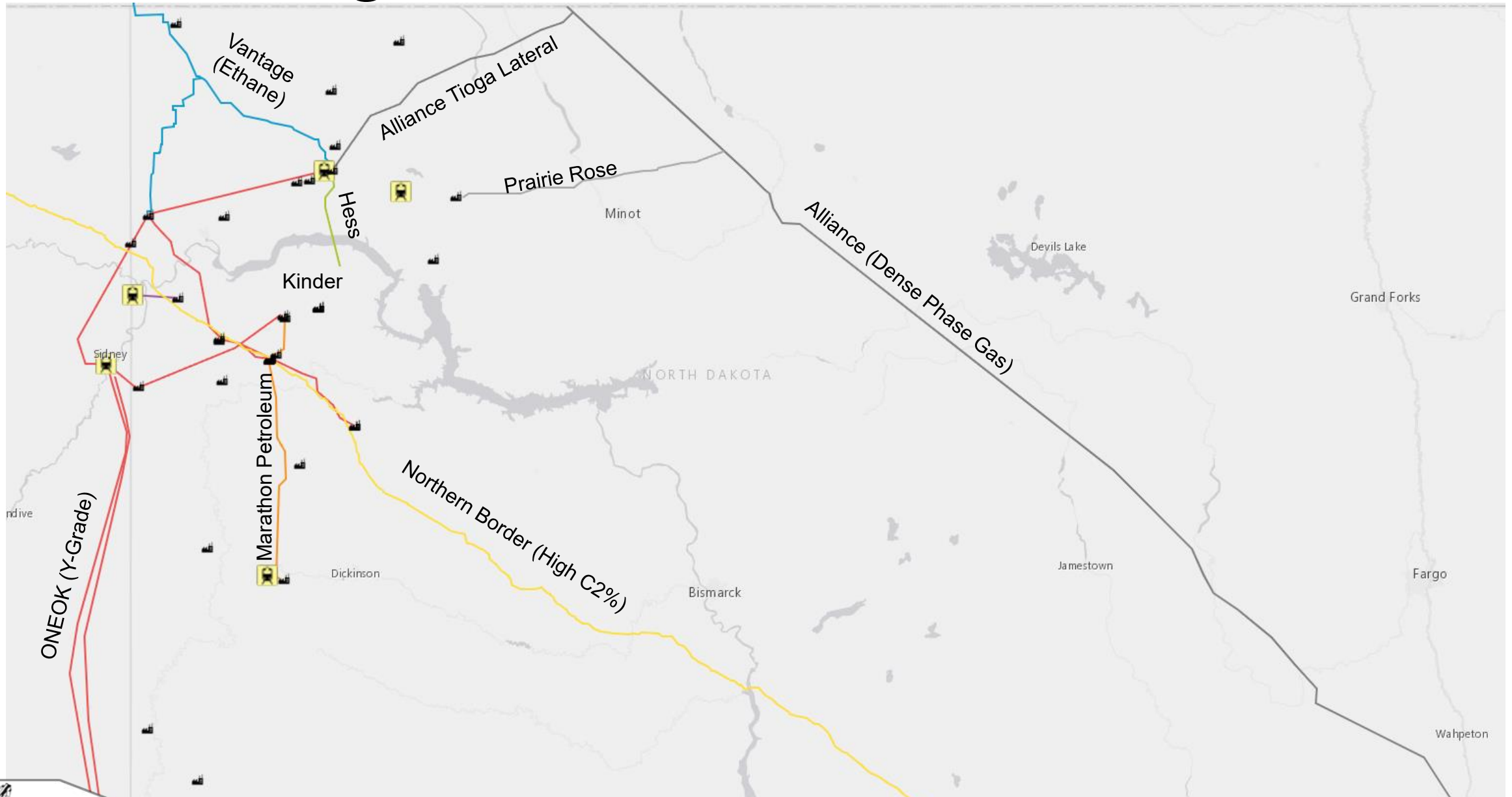
- Capacity reservation: \$0.002113/Day
- Deliverability reservation: \$0.31901/Day
- Injection charge: \$0.00959/Dth
- Withdrawal charge: \$0.00959/Dth



Residue Gas Pipeline Capacity Visualization



Regional NGL Infrastructure



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