

# Pipeline Authority Monthly Update

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July 22, 2025

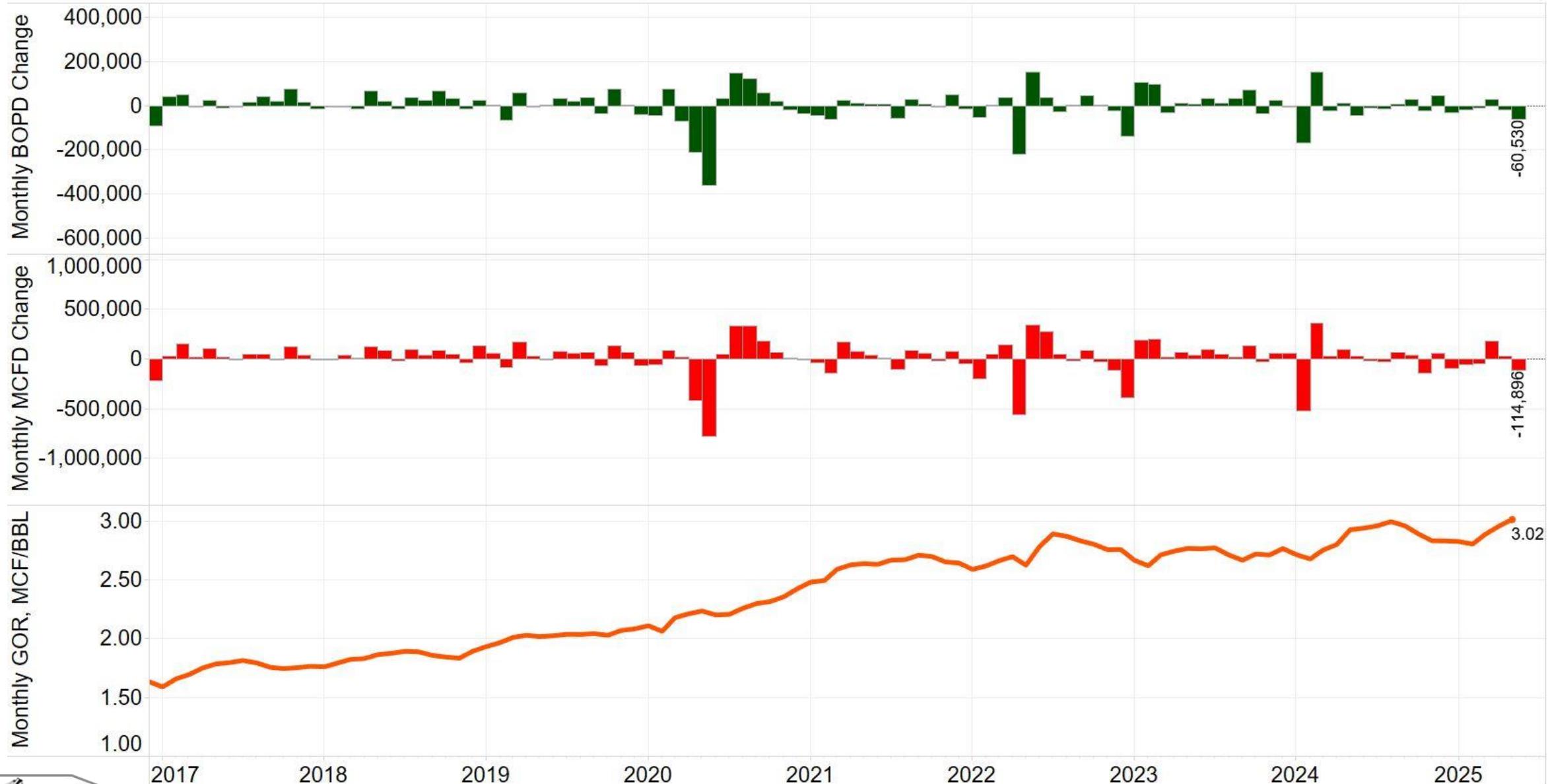


# US Williston Basin Oil Production - 2025

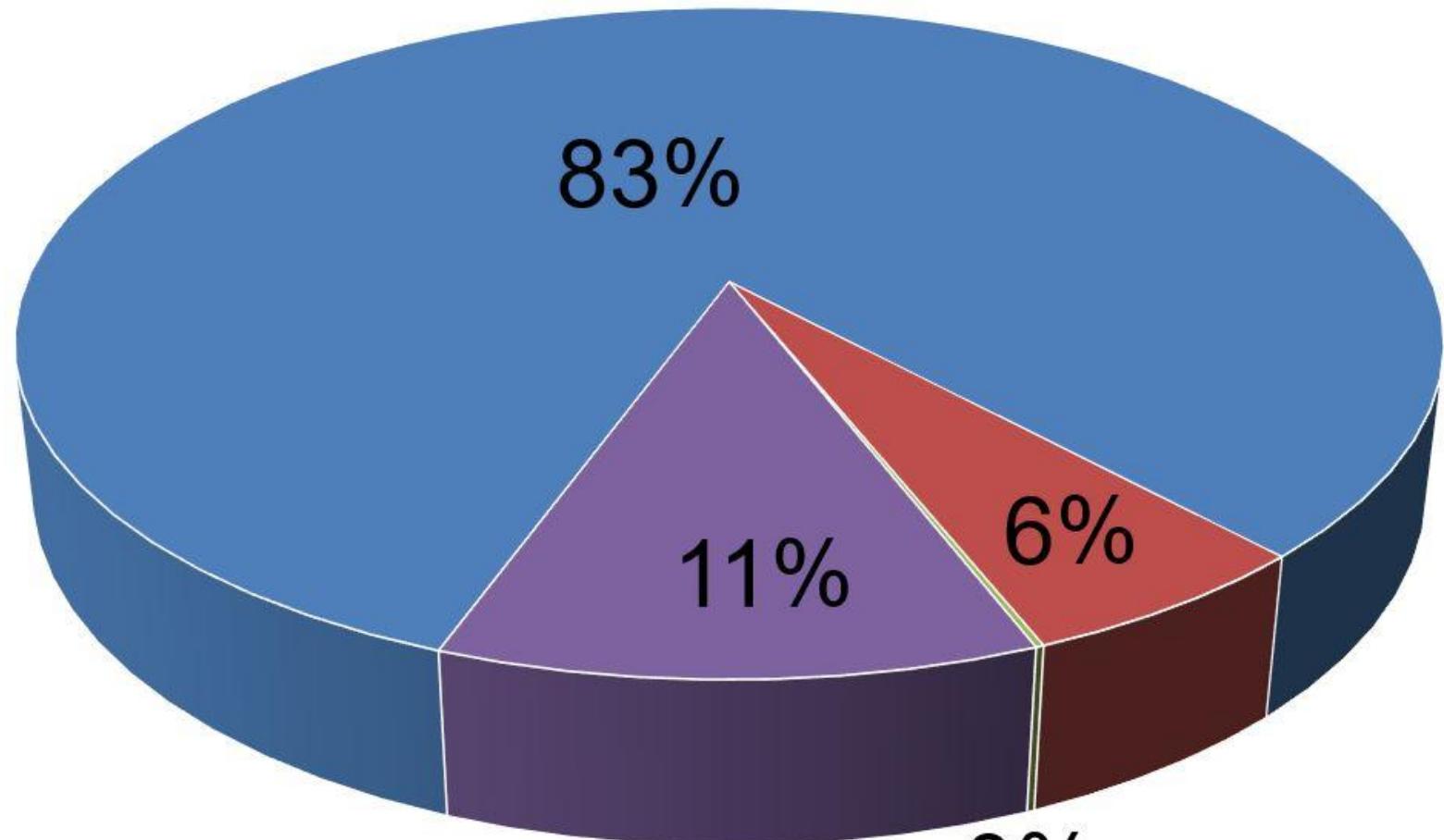
MONTH	ND	Eastern MT*	SD	TOTAL
January	1,175,117	74,740	2,281	1,252,138
February	1,165,405	71,448	2,282	1,239,134
March	1,193,397	75,729	2,272	1,271,398
April	1,173,319	73,901	2,294	1,249,514
May	1,112,790	75,178		
June				
July				
August				
September				
October				
November				
December				



# North Dakota Monthly Production Change



# Estimated Williston Basin Oil Transportation



■ Pipeline Export

■ Truck/Rail to Canada

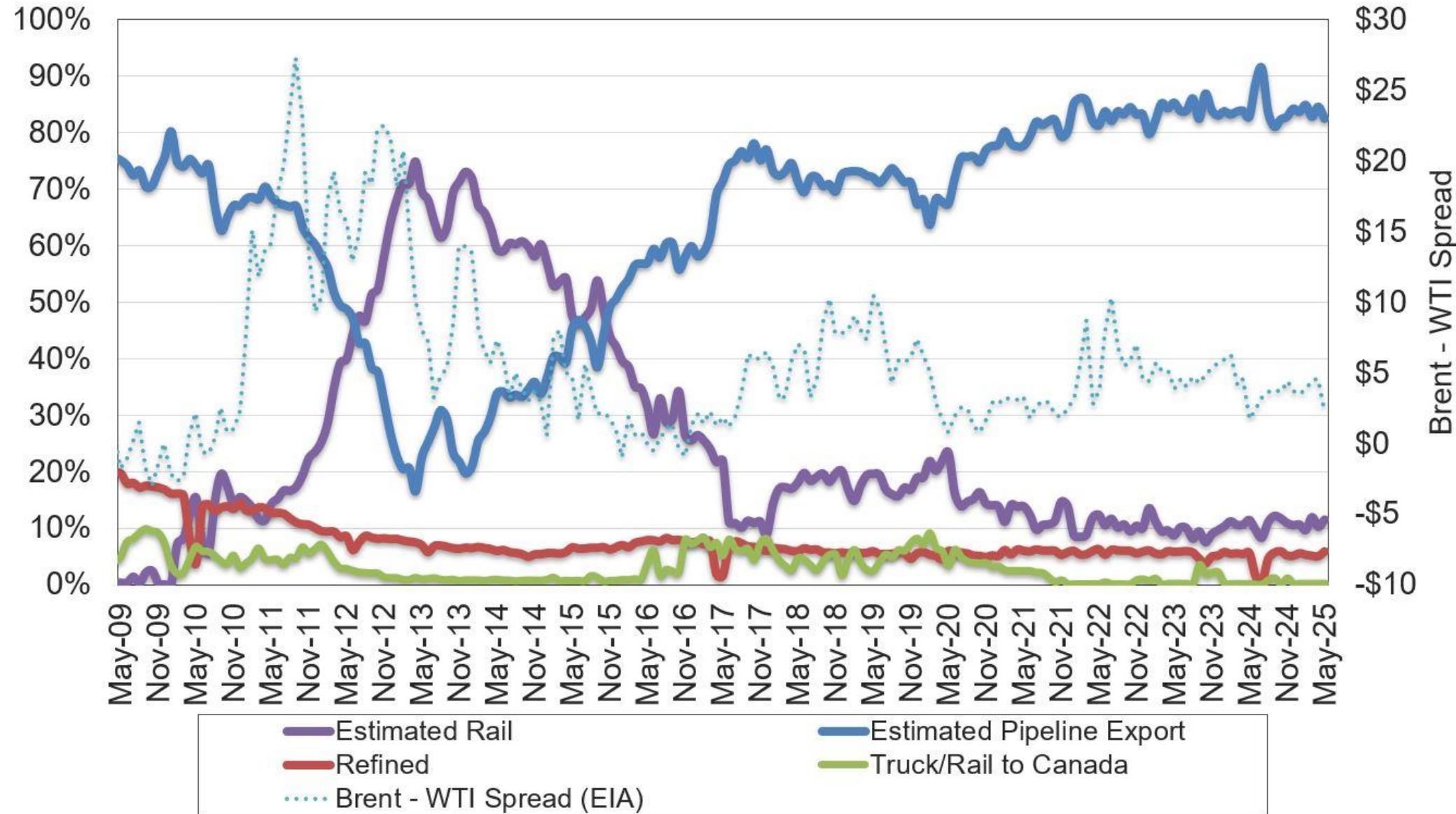
0%

■ Refined

■ Estimated Rail



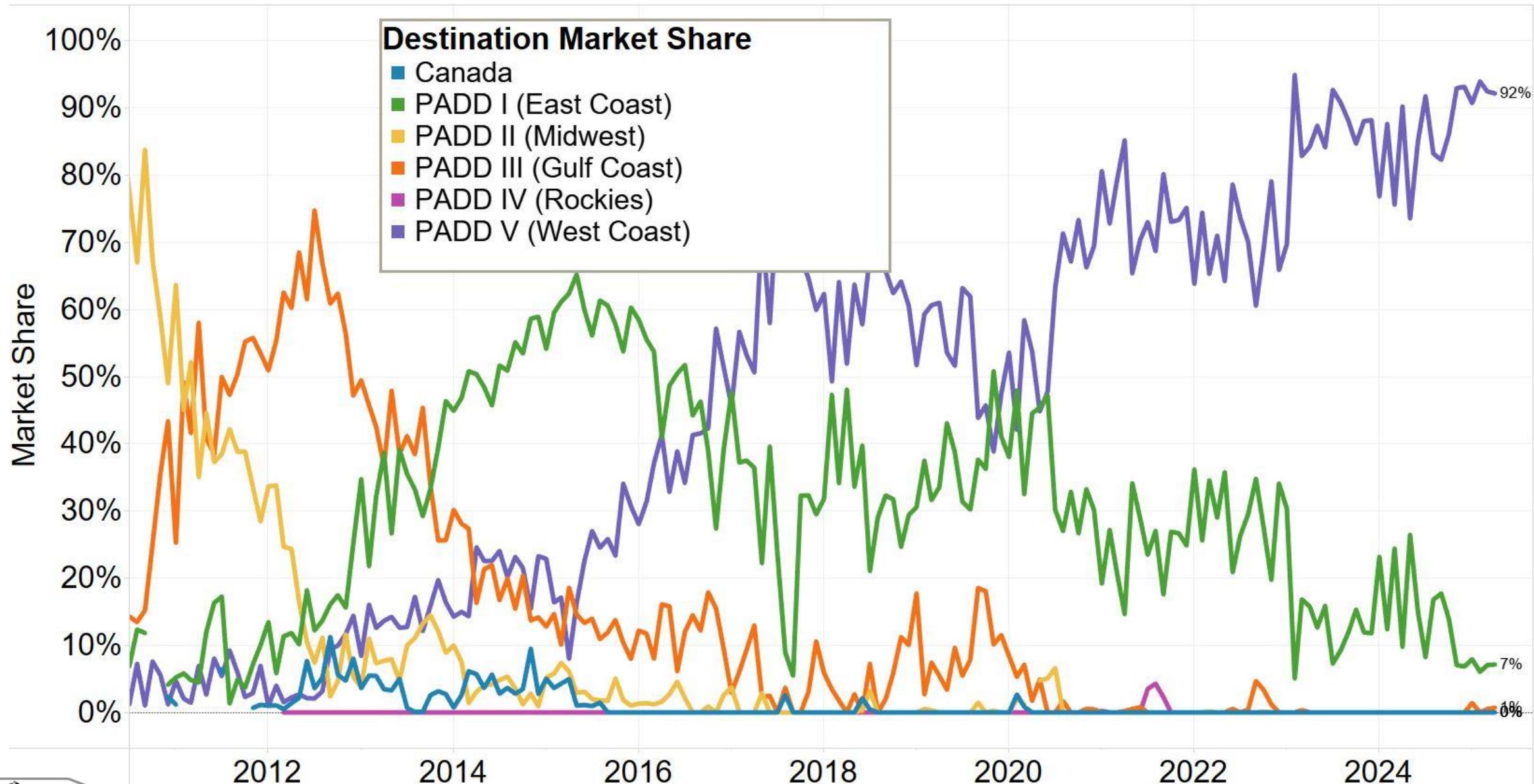
# Estimated Williston Basin Oil Transportation



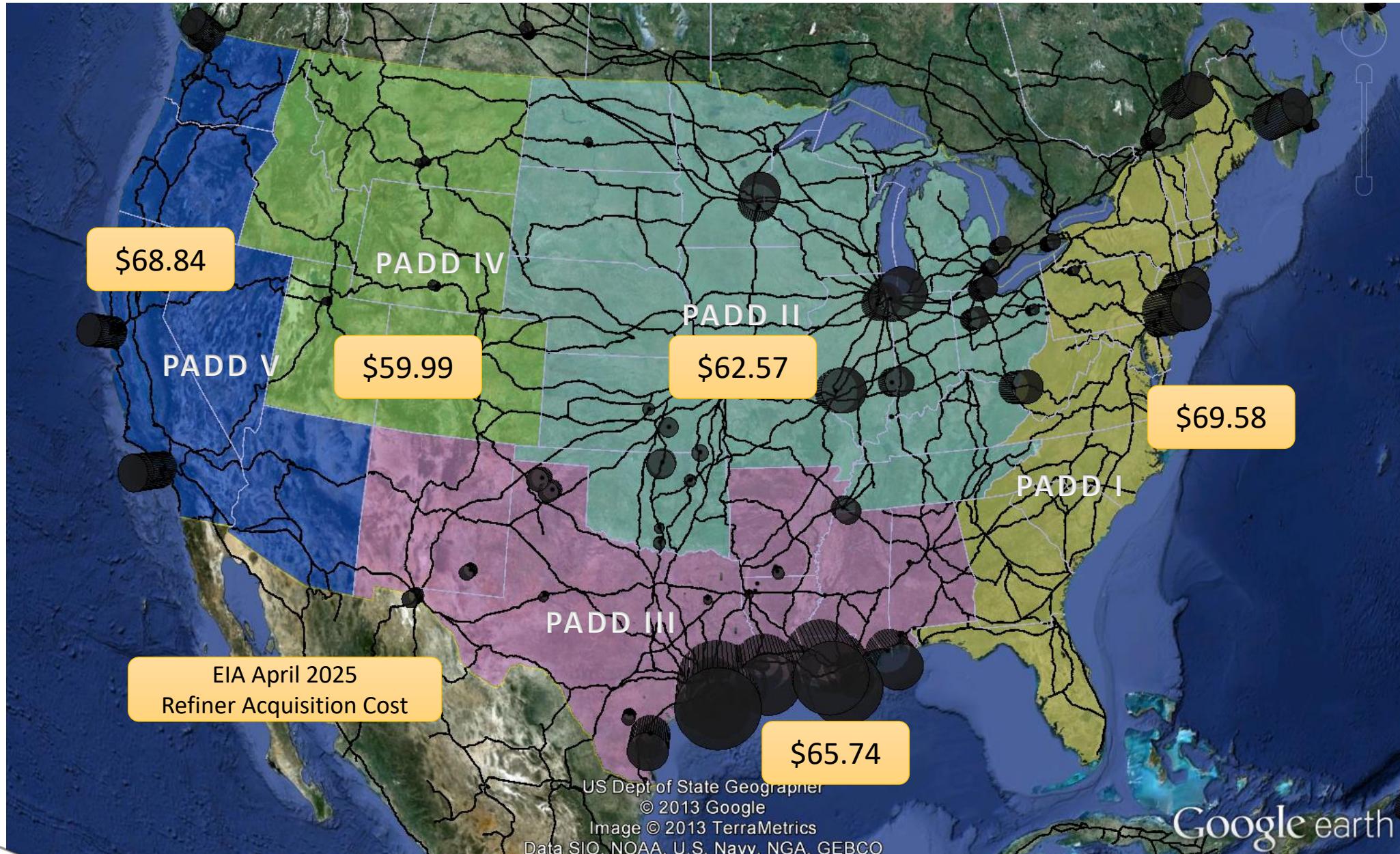
# Estimated ND Rail Export Volumes



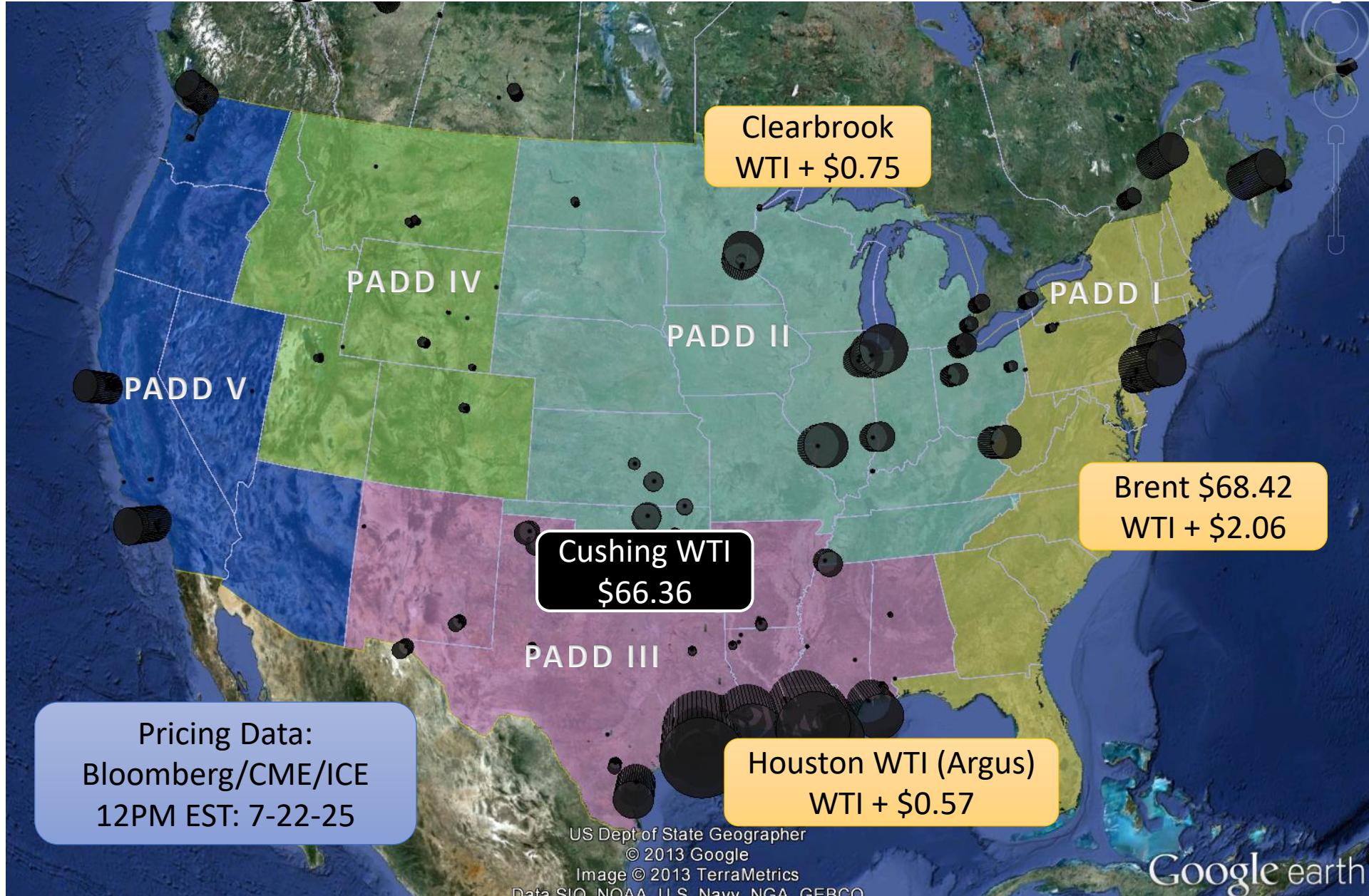
# Rail Destinations Market Share (April 2025)



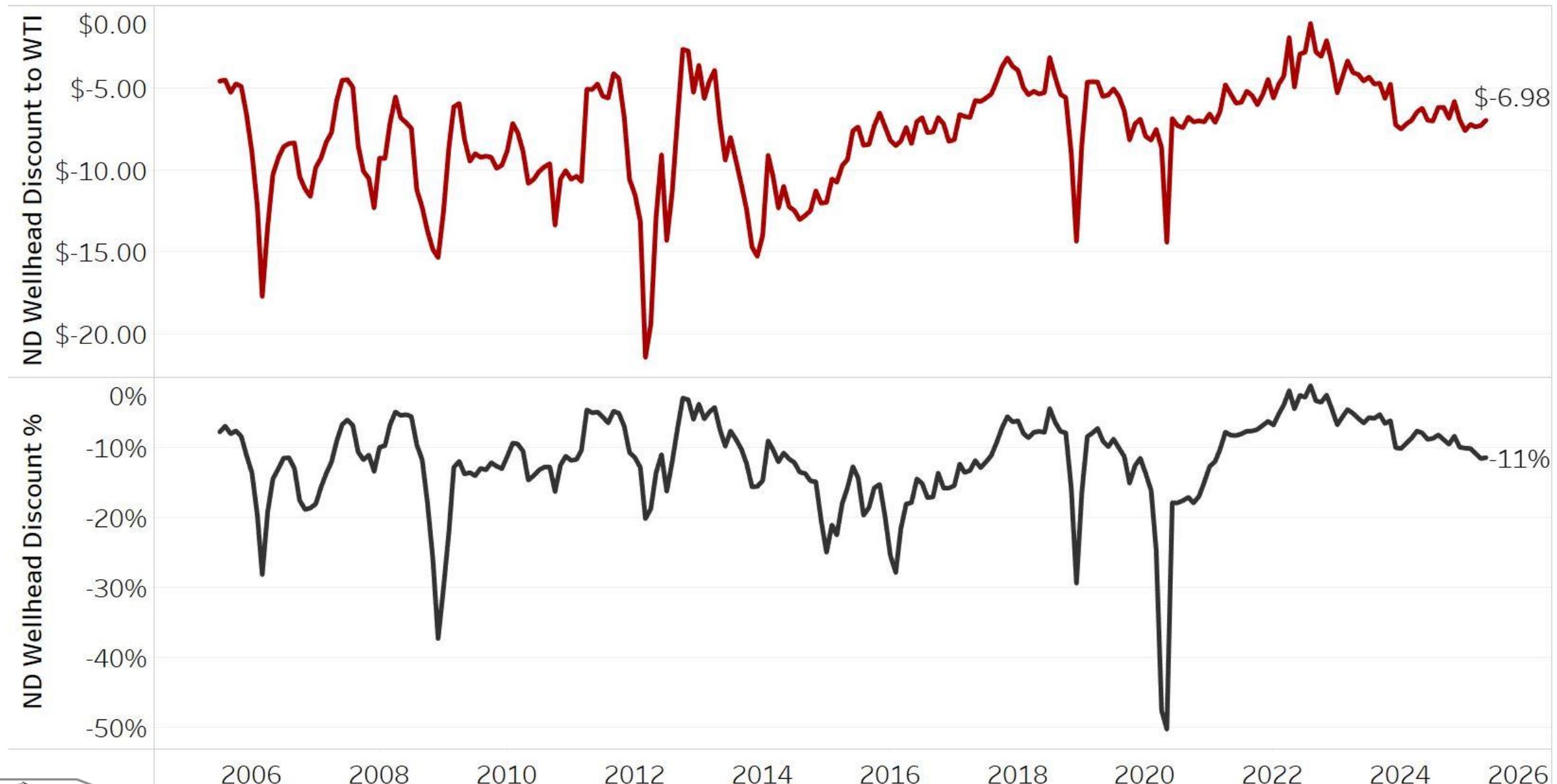
# Major Rail Lines and Refineries



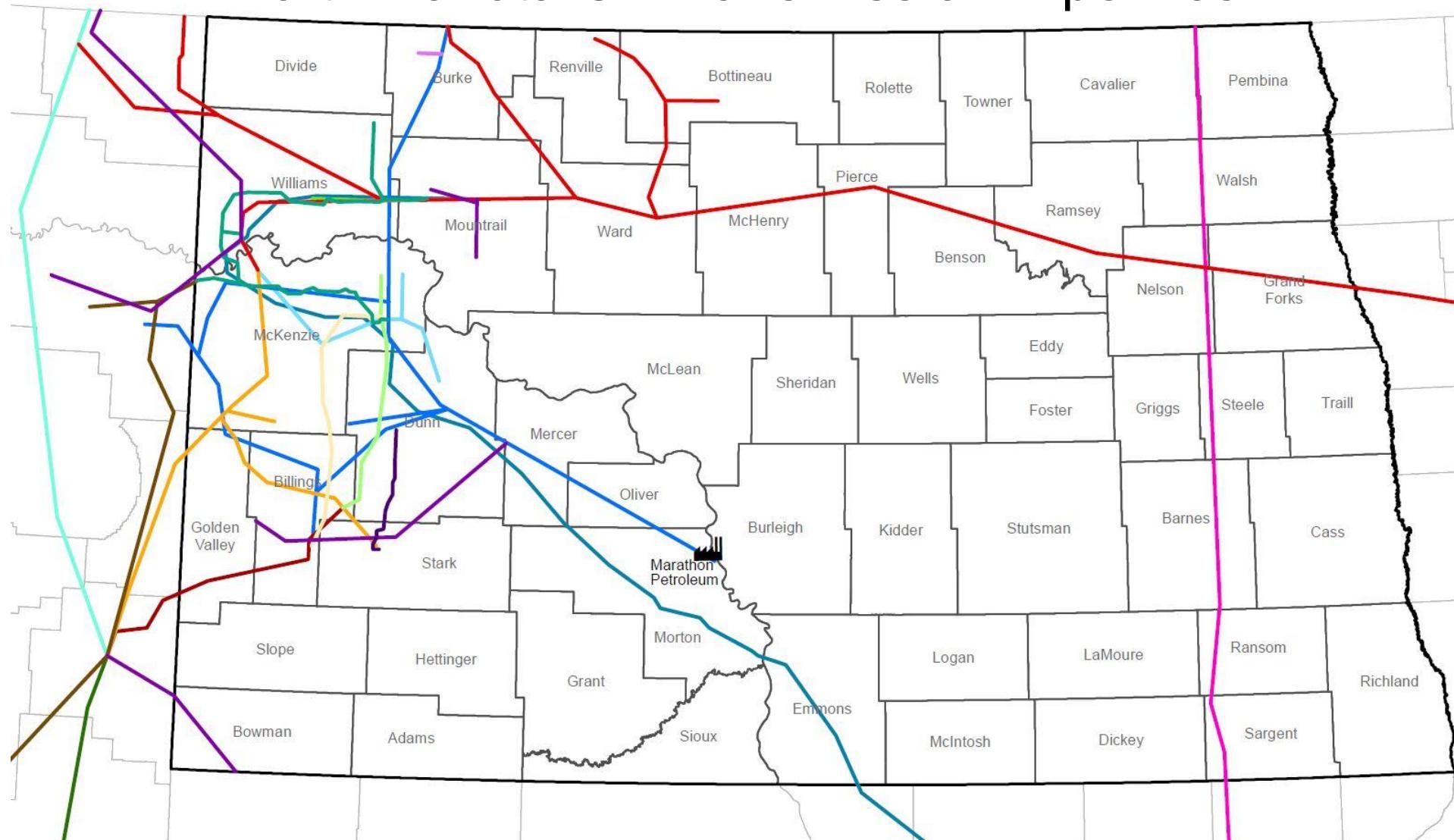
# Major Pricing Benchmarks & Refining Centers



# Average North Dakota Oil “Discount” to WTI



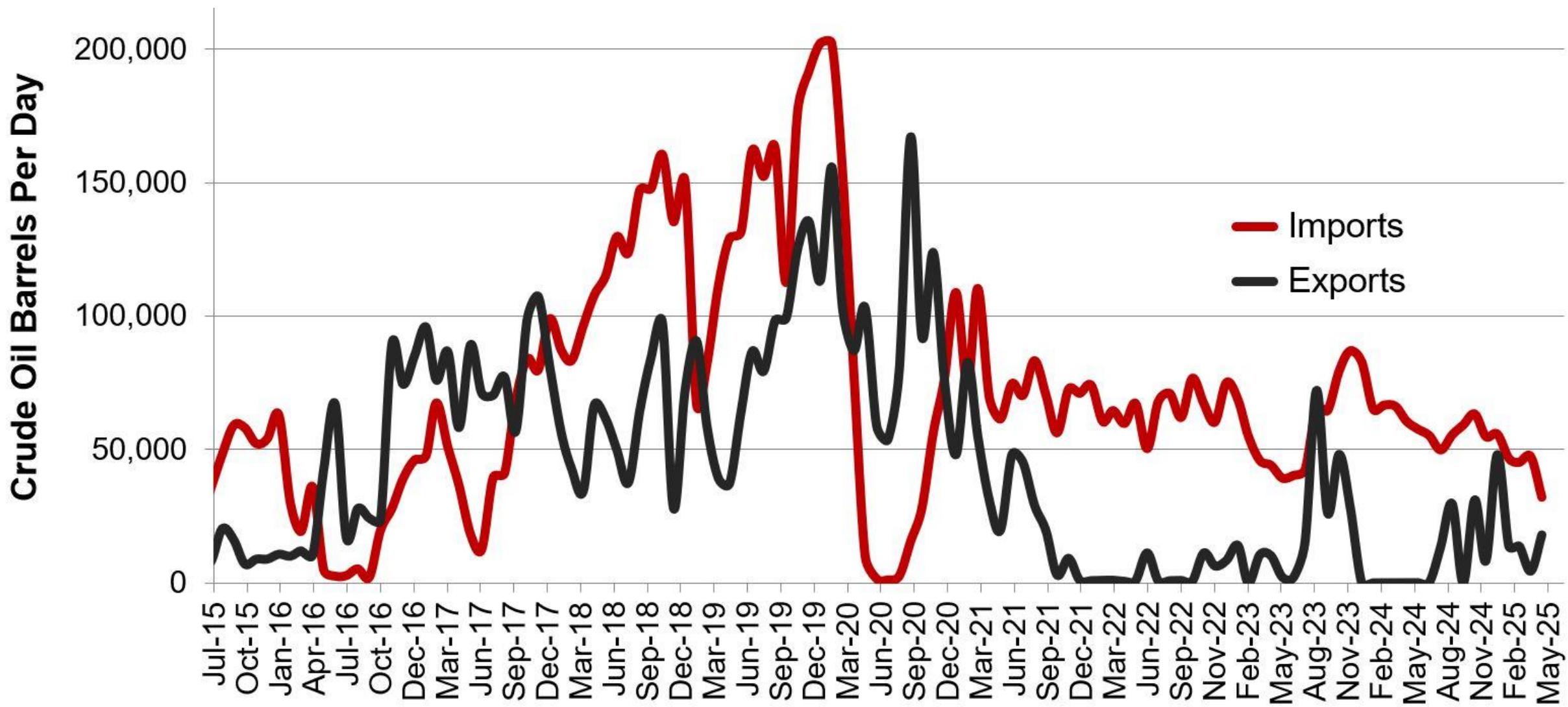
# North Dakota Oil Transmission Pipelines



- 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



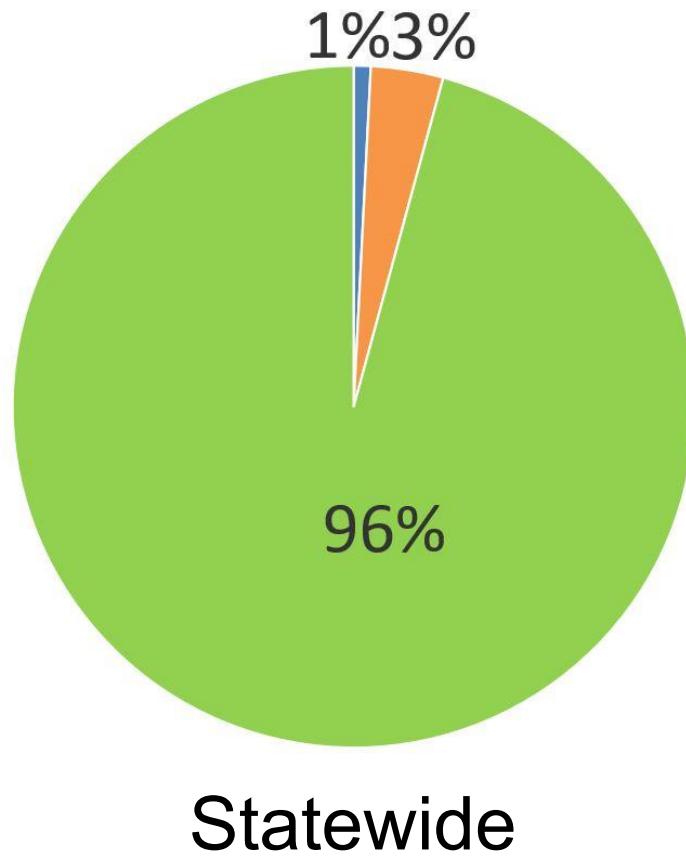
# Williston Basin Truck/Rail Imports and Exports with Canada



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



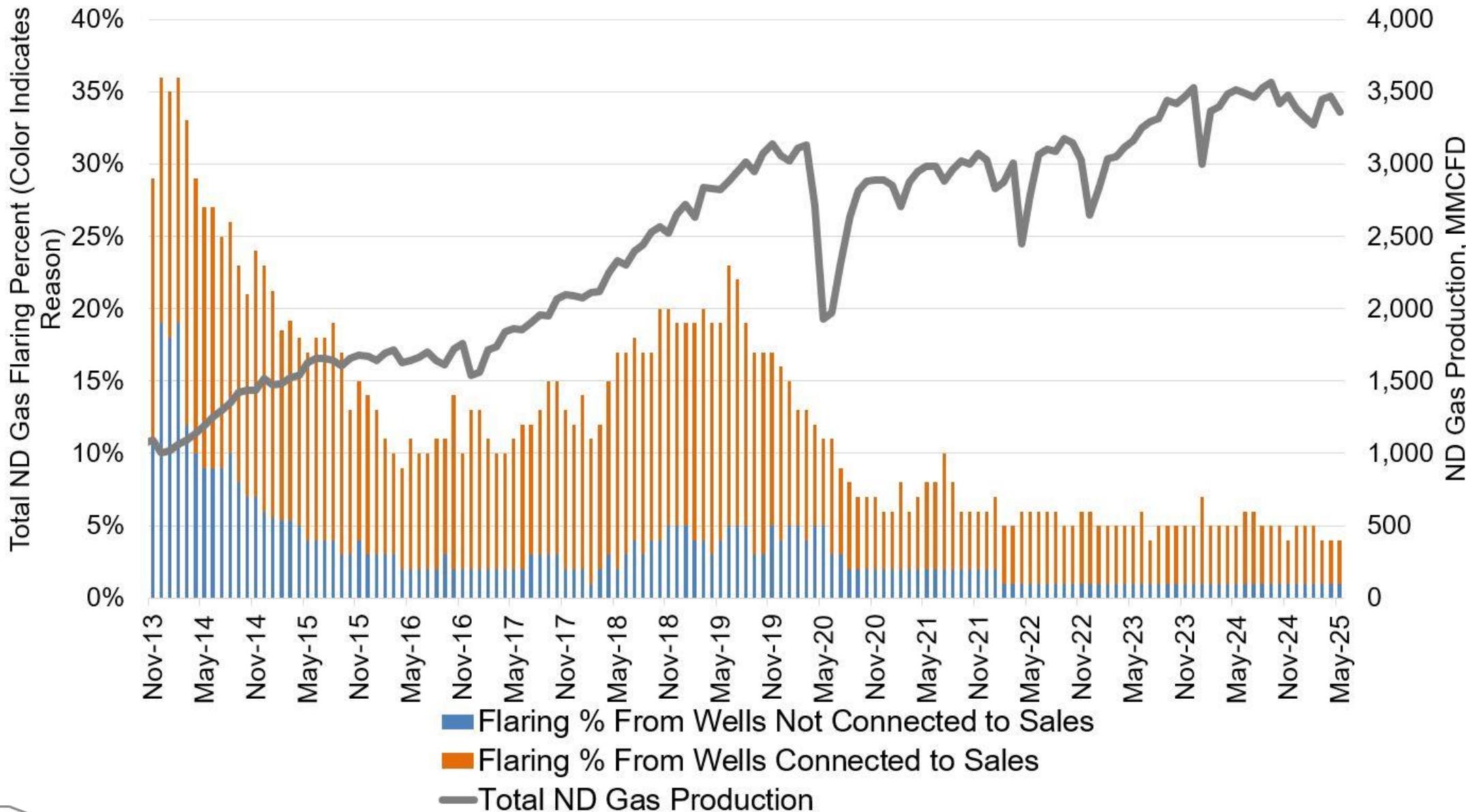
**GREEN** – % of gas captured and sold  
**Blue** – % flared from zero sales wells  
**Orange** – % flared from wells with at least one mcf sold.

## Simple Terms

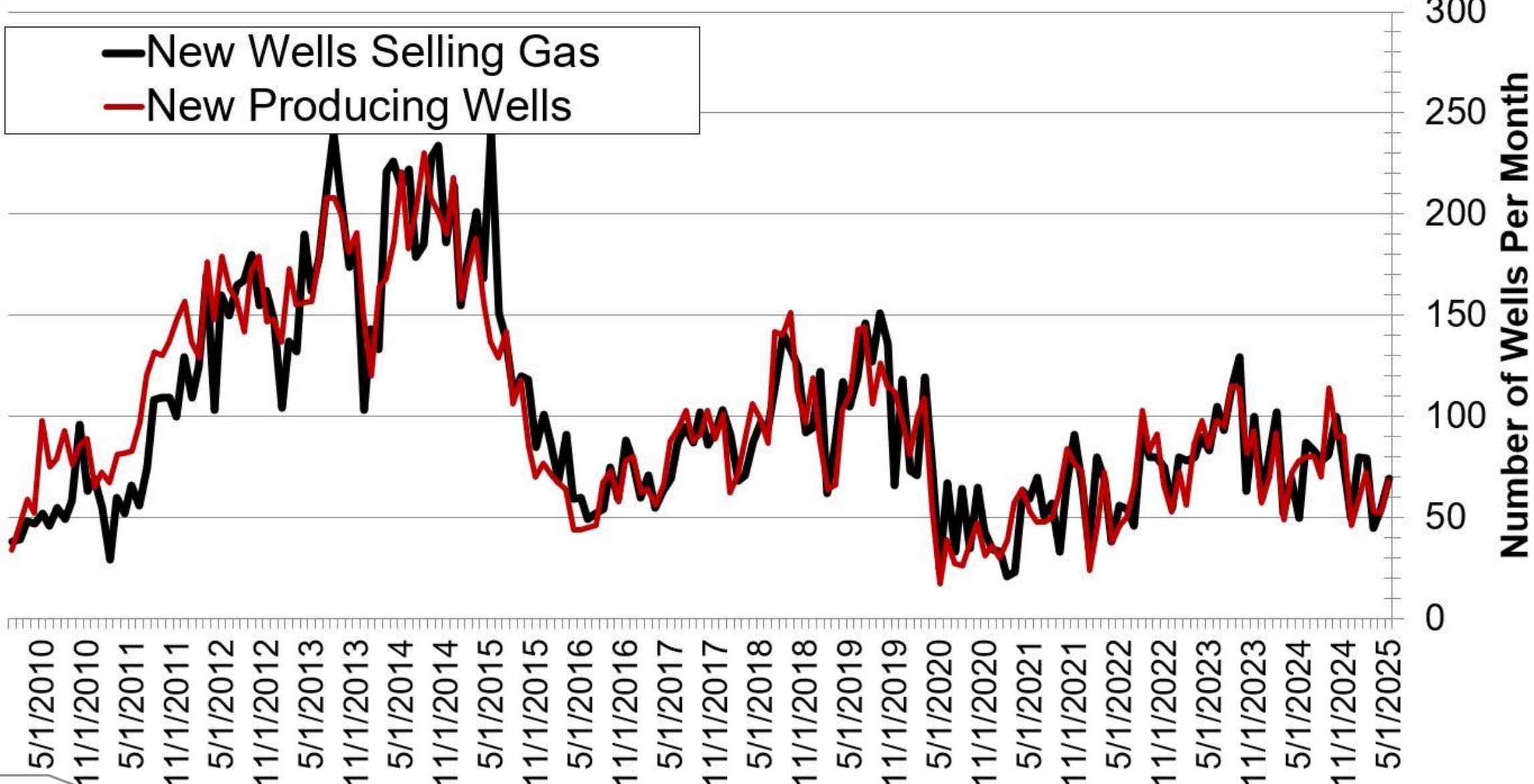
**Blue** – Lack of pipelines  
**Orange** – Challenges on existing infrastructure

May 2025 Data – Non-Confidential Wells

# Solving the Flaring Challenge

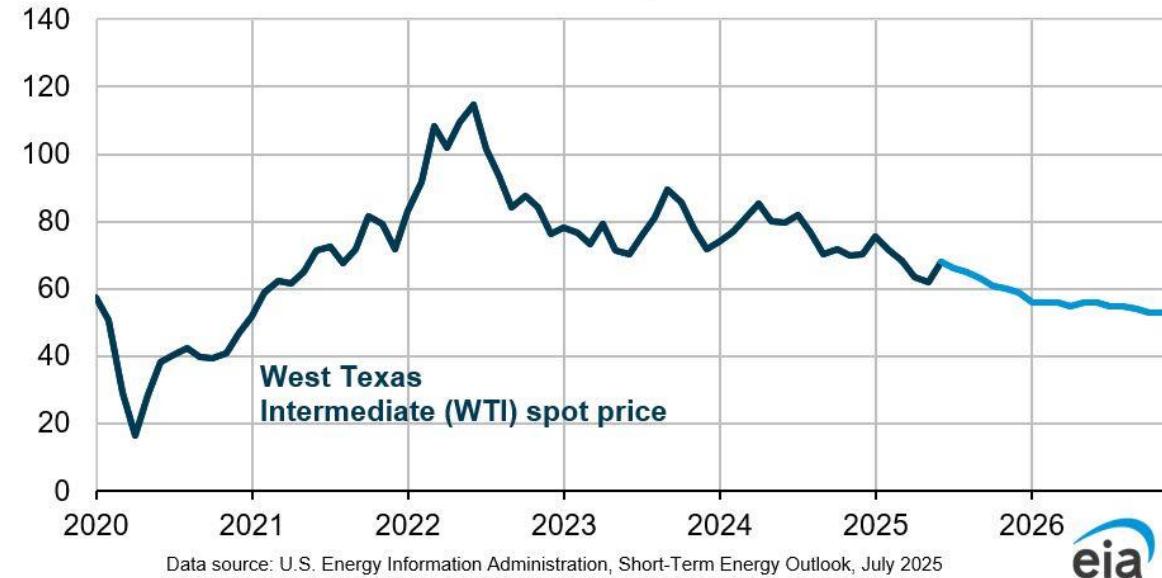


# Solving the Flaring Challenge



# EIA Oil Price Outlook (July 2025)

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

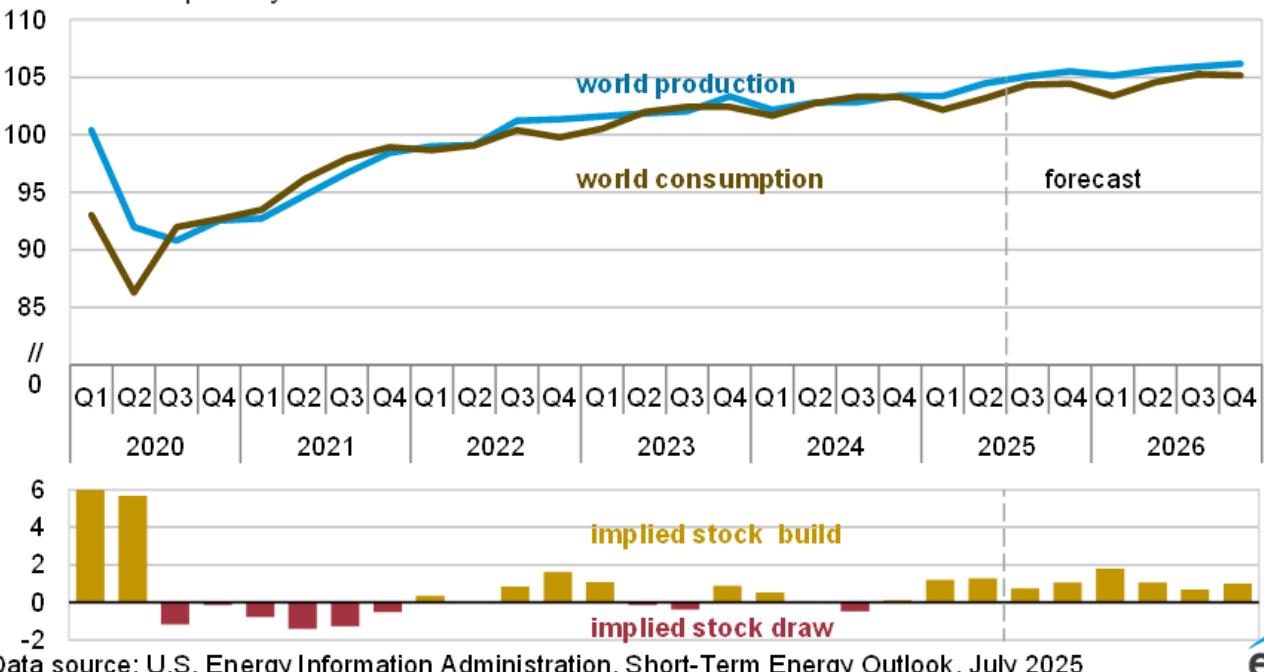


Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, July 2025



STEO forecast

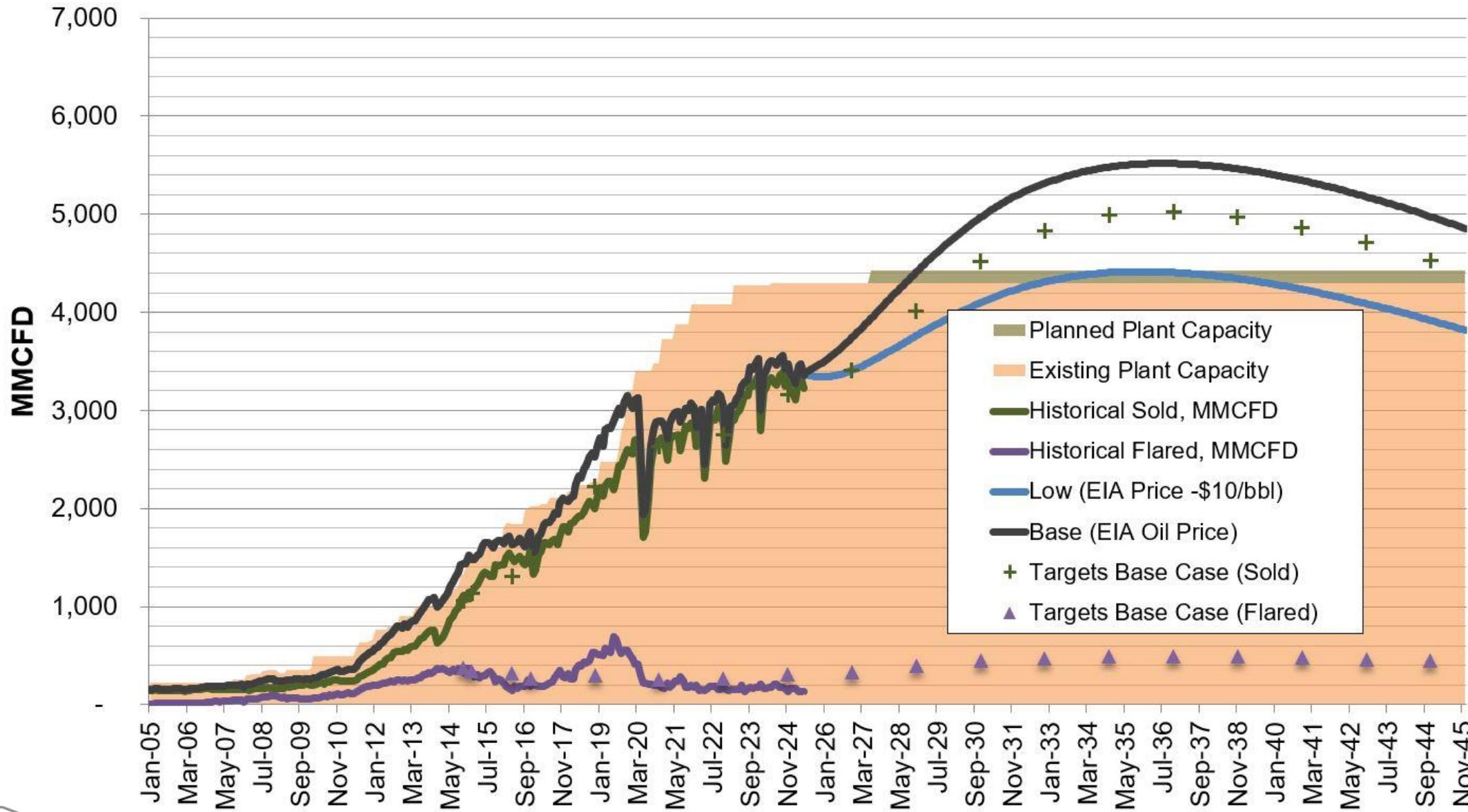
World liquid fuels production and consumption balance  
million barrels per day



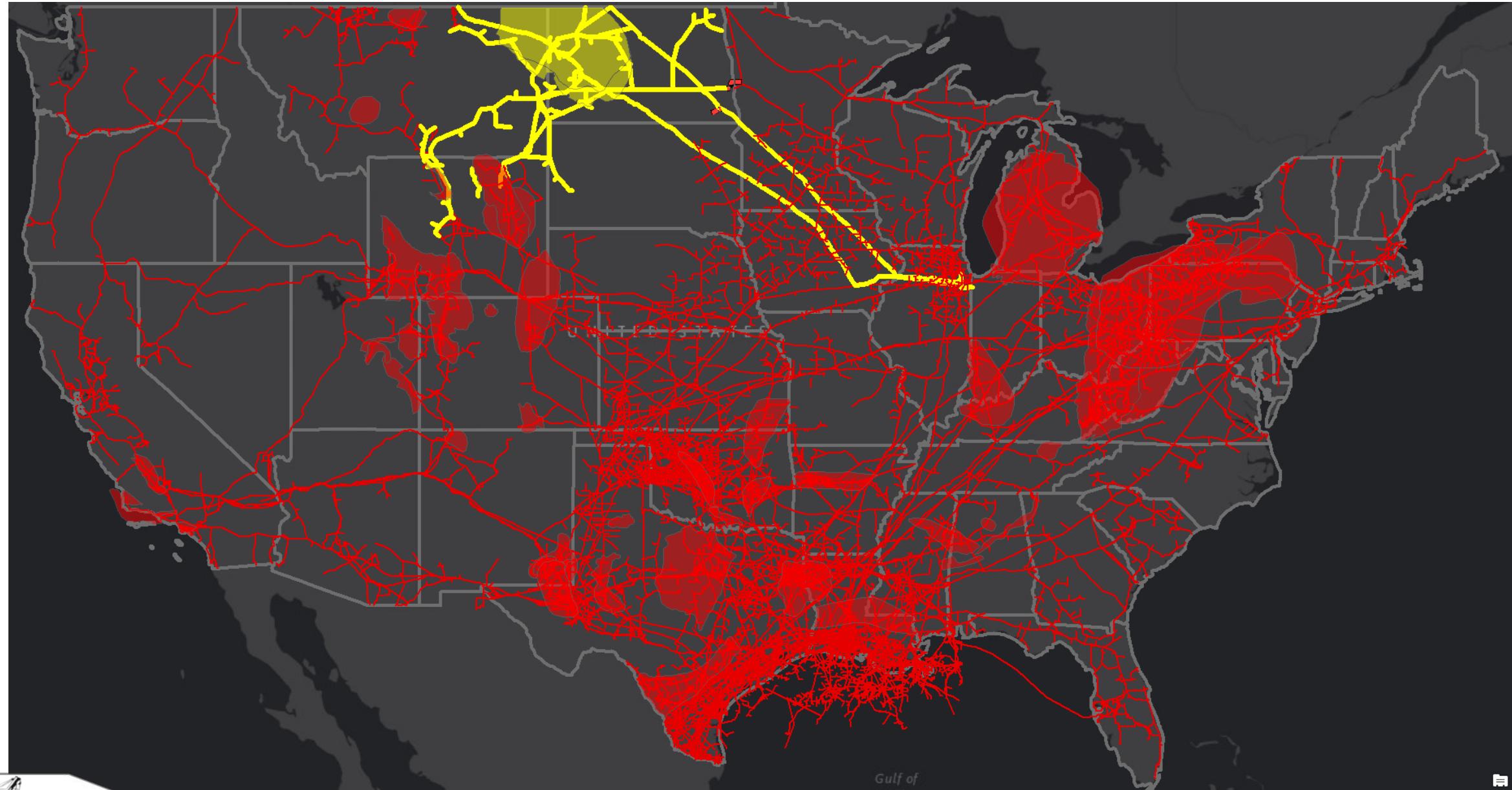
Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, July 2025



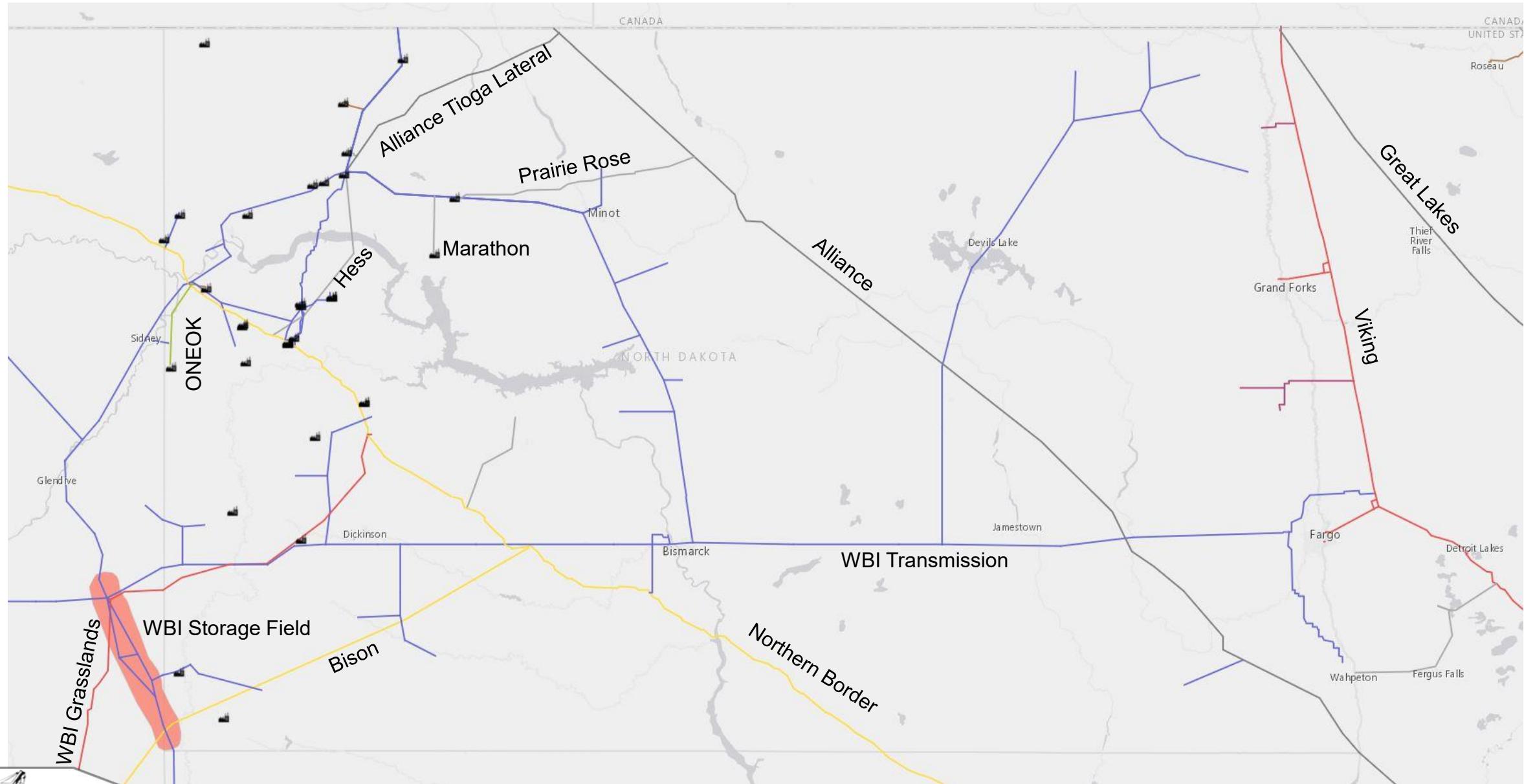
# North Dakota Gas Processing Outlook



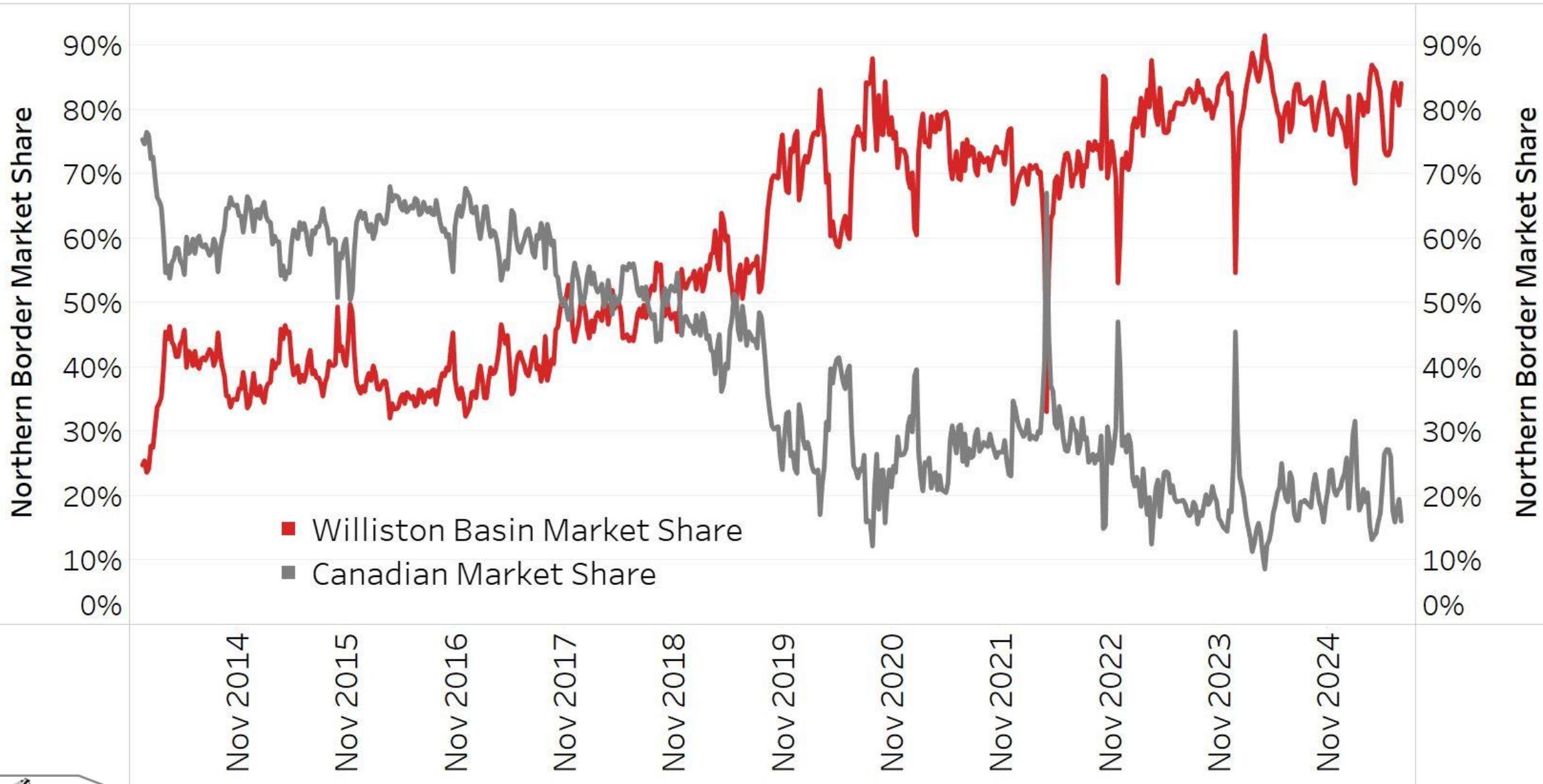
# Bakken Natural Gas Infrastructure



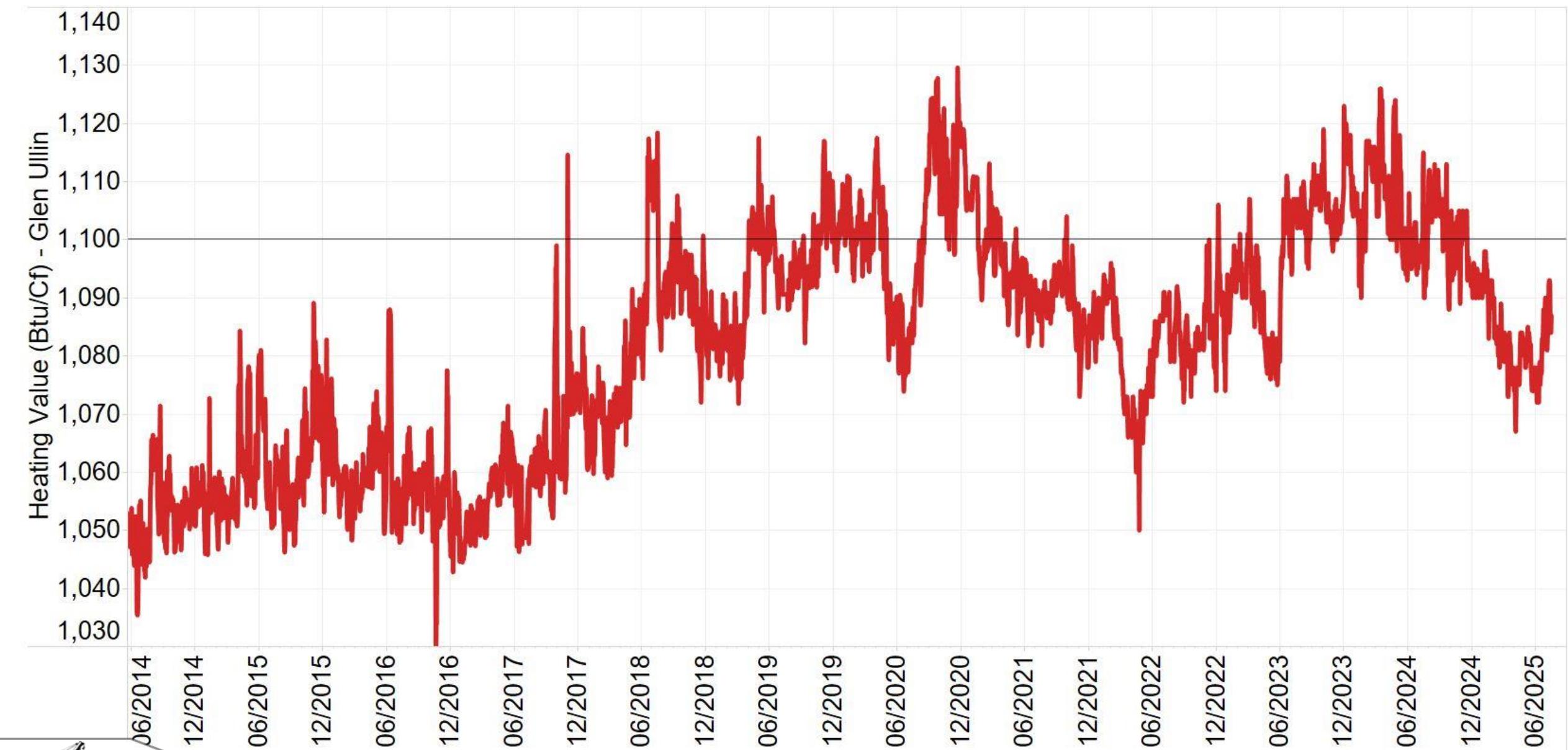
# Major Residue Gas Pipeline Infrastructure



# 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

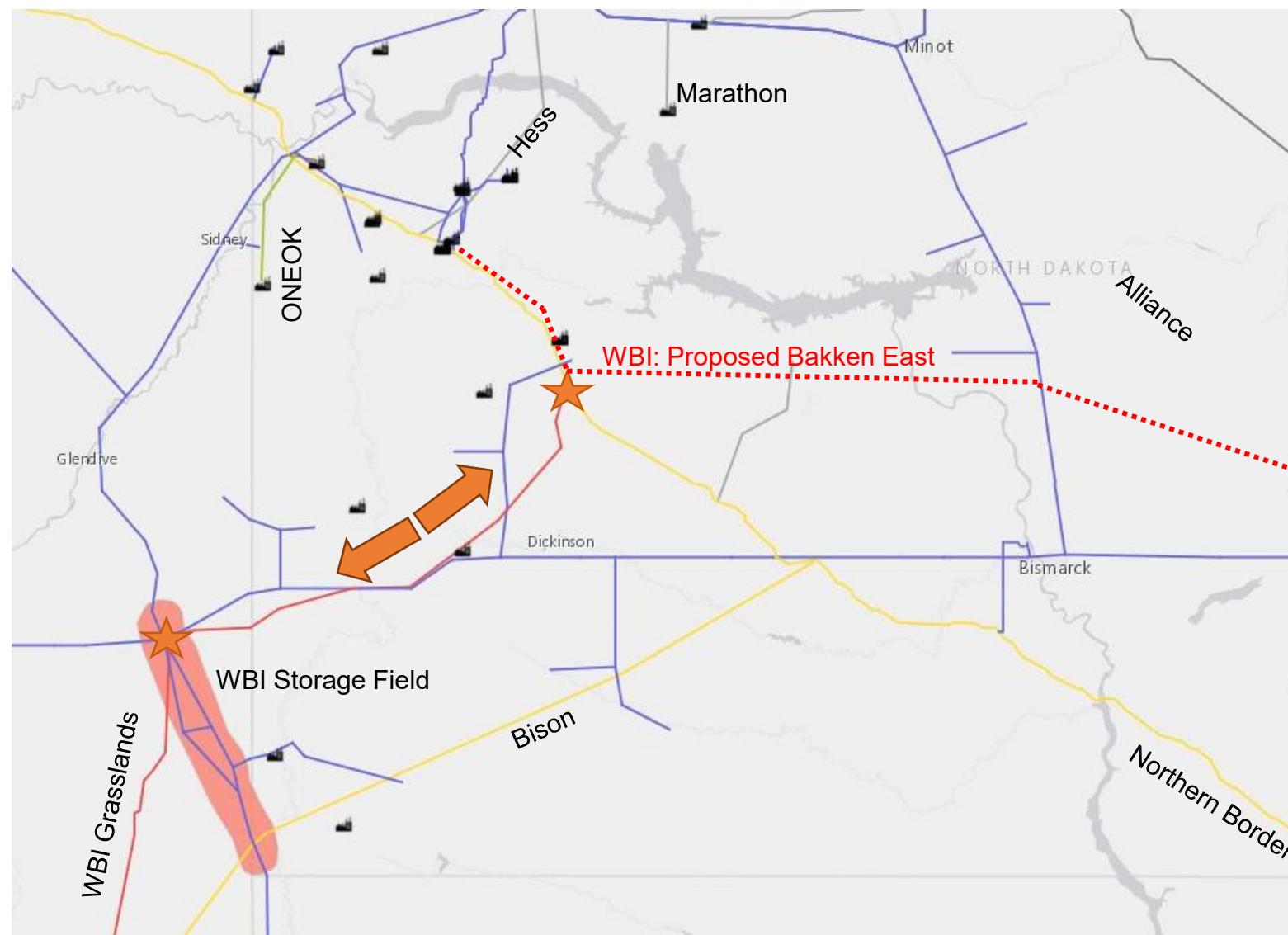
- Non-binding open season Apr 17 – May 23, 2025
- 208 Miles: 30" Pipe
- Proposed Capacity 430,000 Dth/Day
- January 2030 targeted in-service
- Seeking commitments 10yrs or Longer

## 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

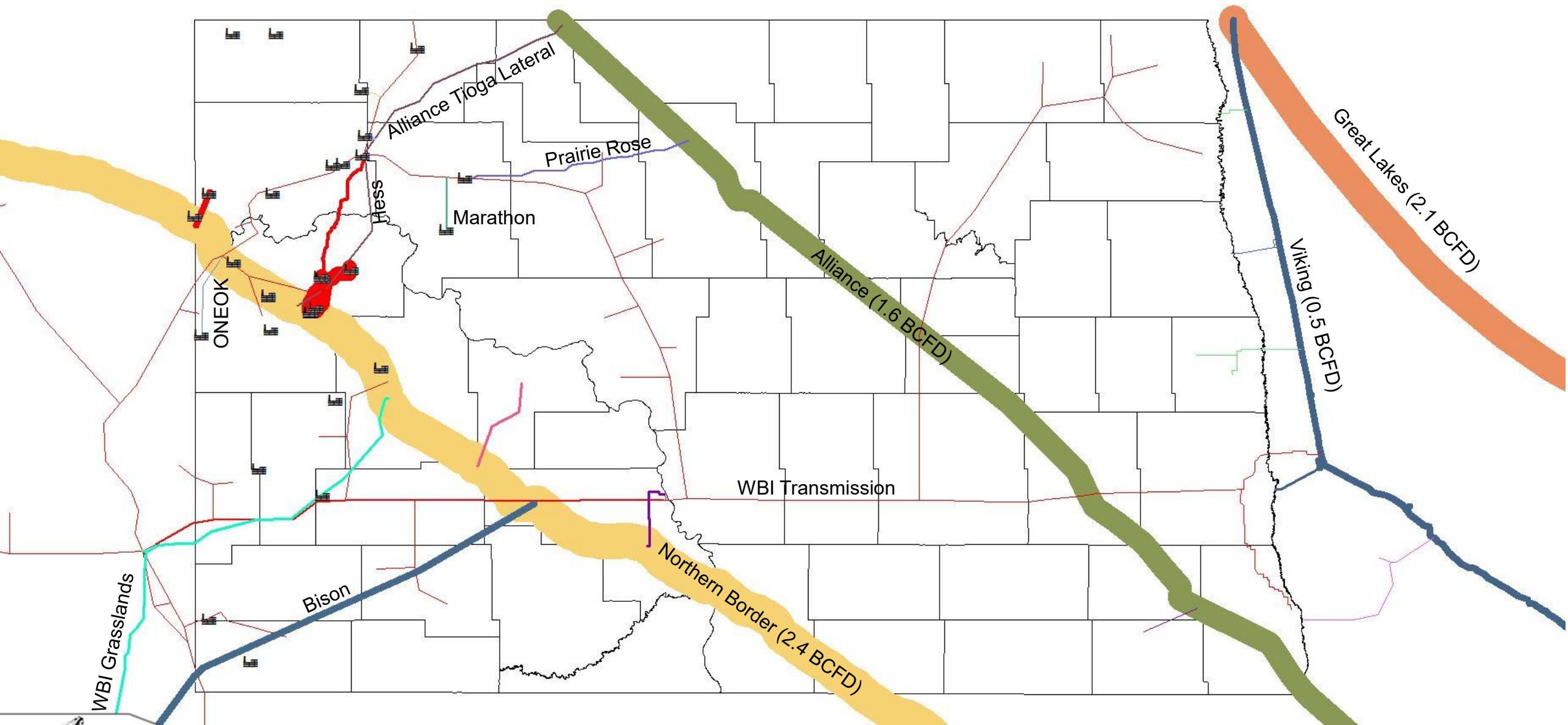
## Storage Project Highlights

- 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

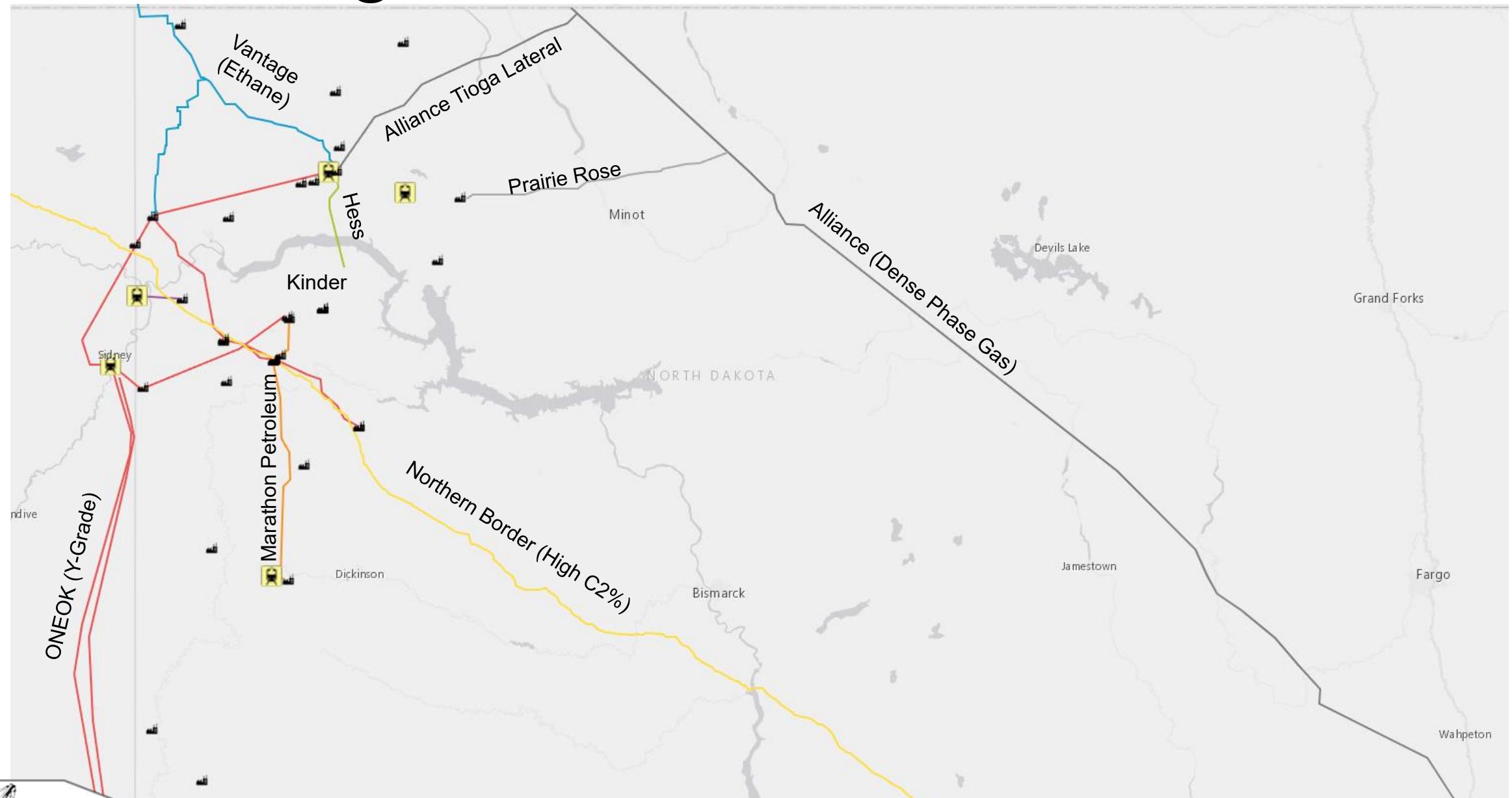
## Estimated Rates (+Fuel/Elec/Commodity)

- 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



# Contact Information

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