

Pipeline Authority Monthly Update

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October 24, 2025

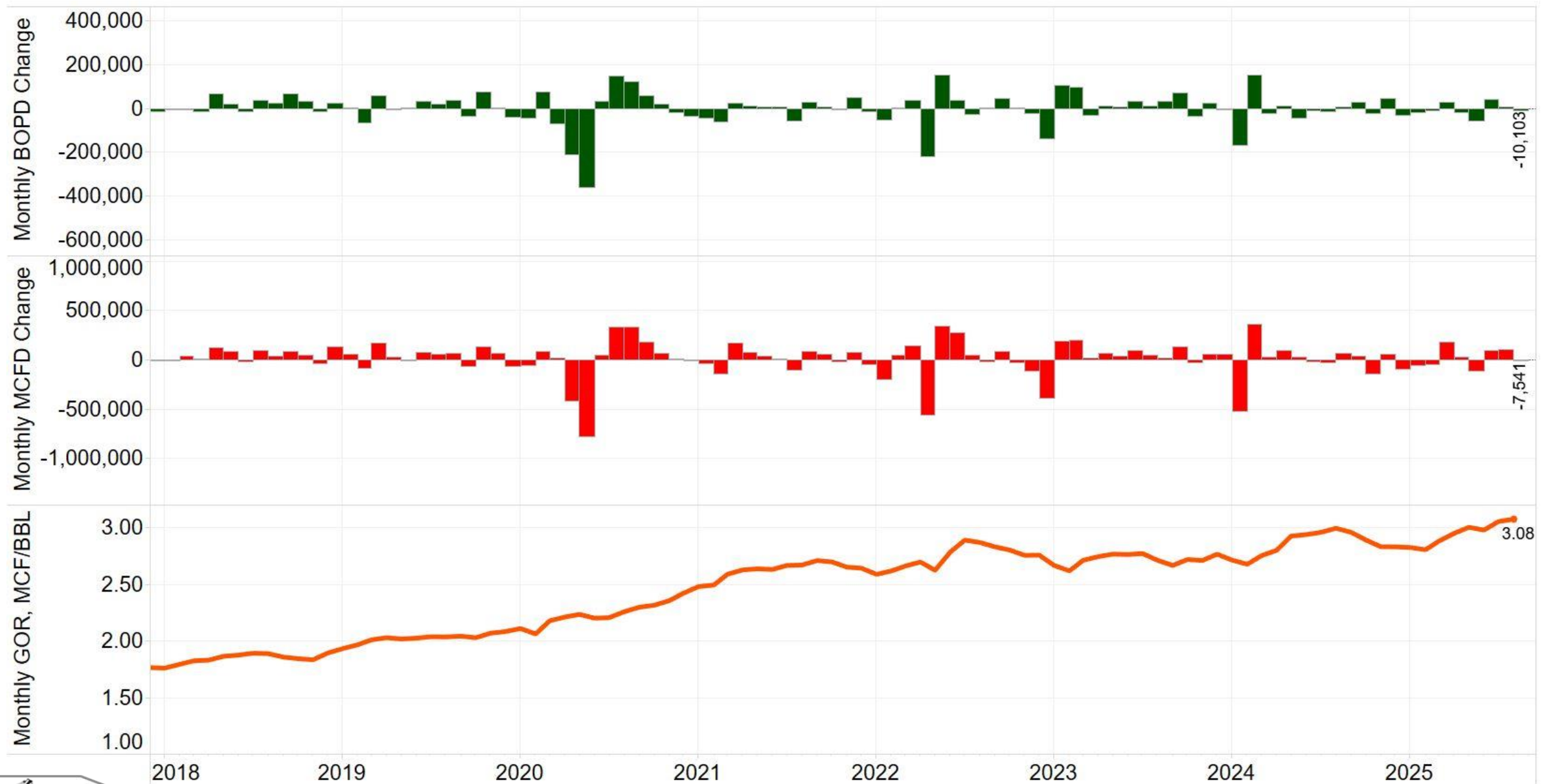


US Williston Basin Oil Production - 2025

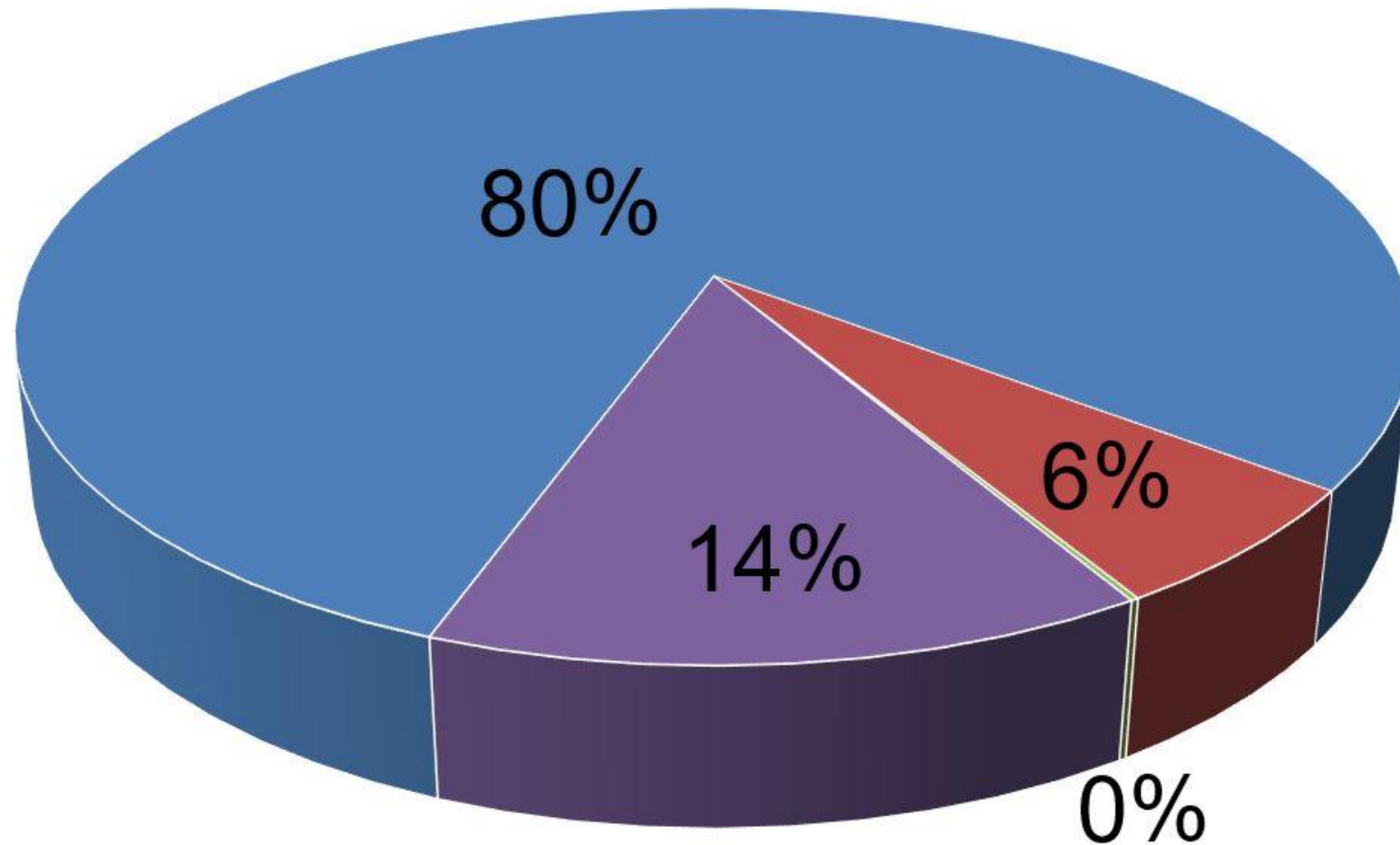
MONTH	ND	Eastern MT*	SD	TOTAL
January	1,175,185	74,977	2,281	1,252,443
February	1,164,645	71,717	2,282	1,238,644
March	1,194,435	76,008	2,272	1,272,715
April	1,175,004	74,879	2,294	1,252,177
May	1,116,814	79,634	2,295	1,198,743
June	1,158,726	79,625	2,145	1,240,496
July	1,163,583	79,656	2,271	1,245,510
August	1,153,480			
September				
October				
November				
December				



North Dakota Monthly Production Change



Estimated Williston Basin Oil Transportation



■ Pipeline Export

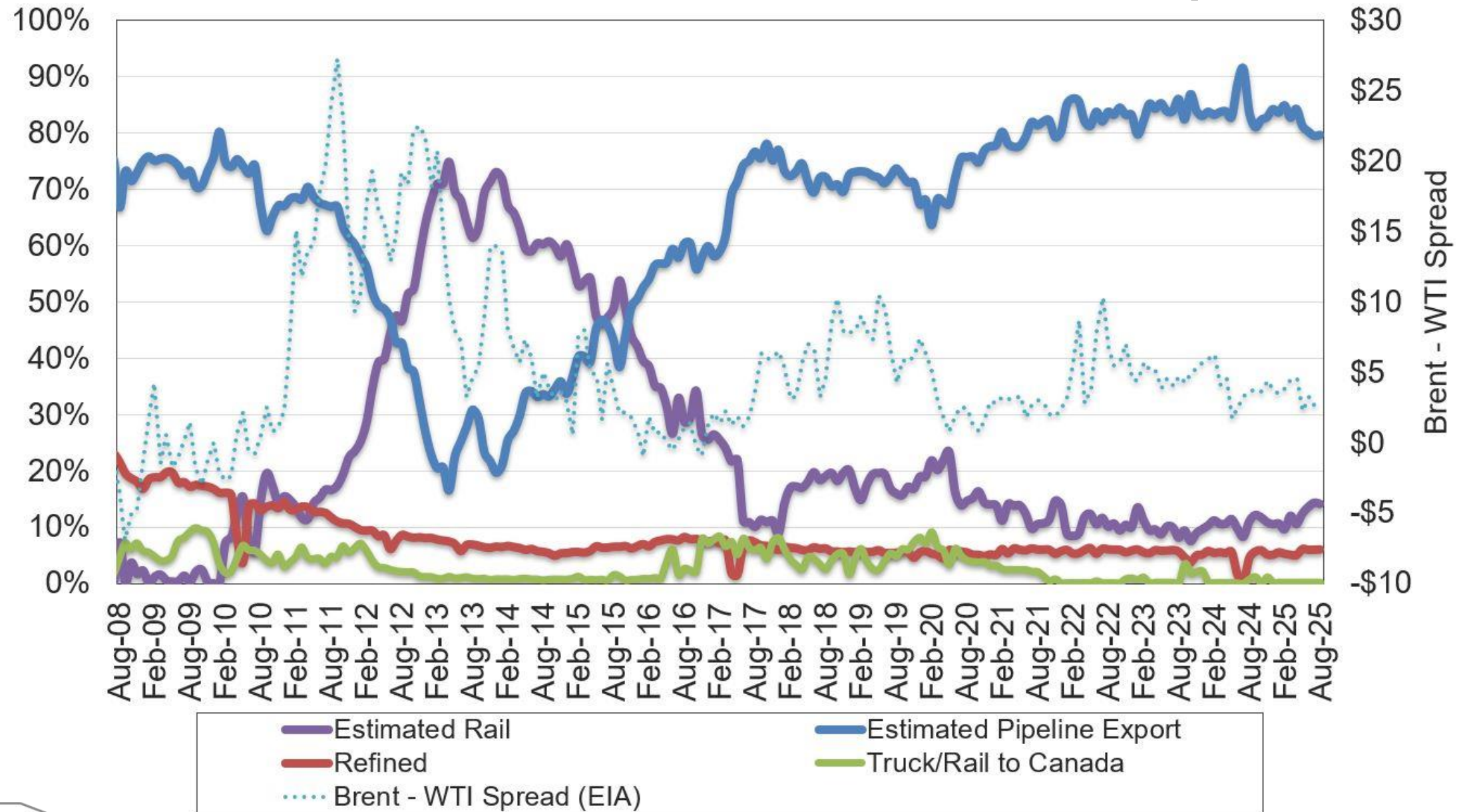
■ Truck/Rail to Canada

■ Refined

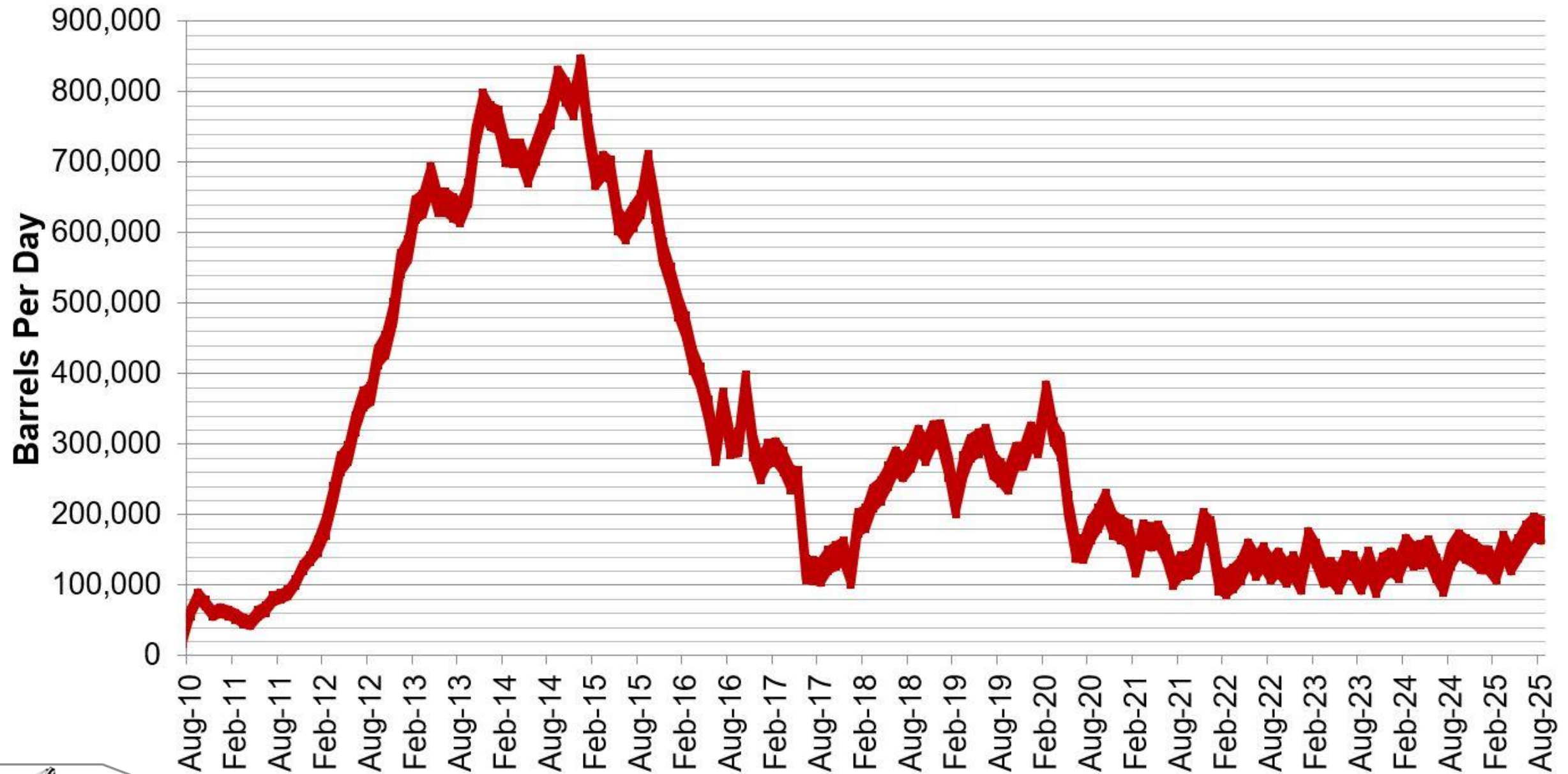
■ Estimated Rail



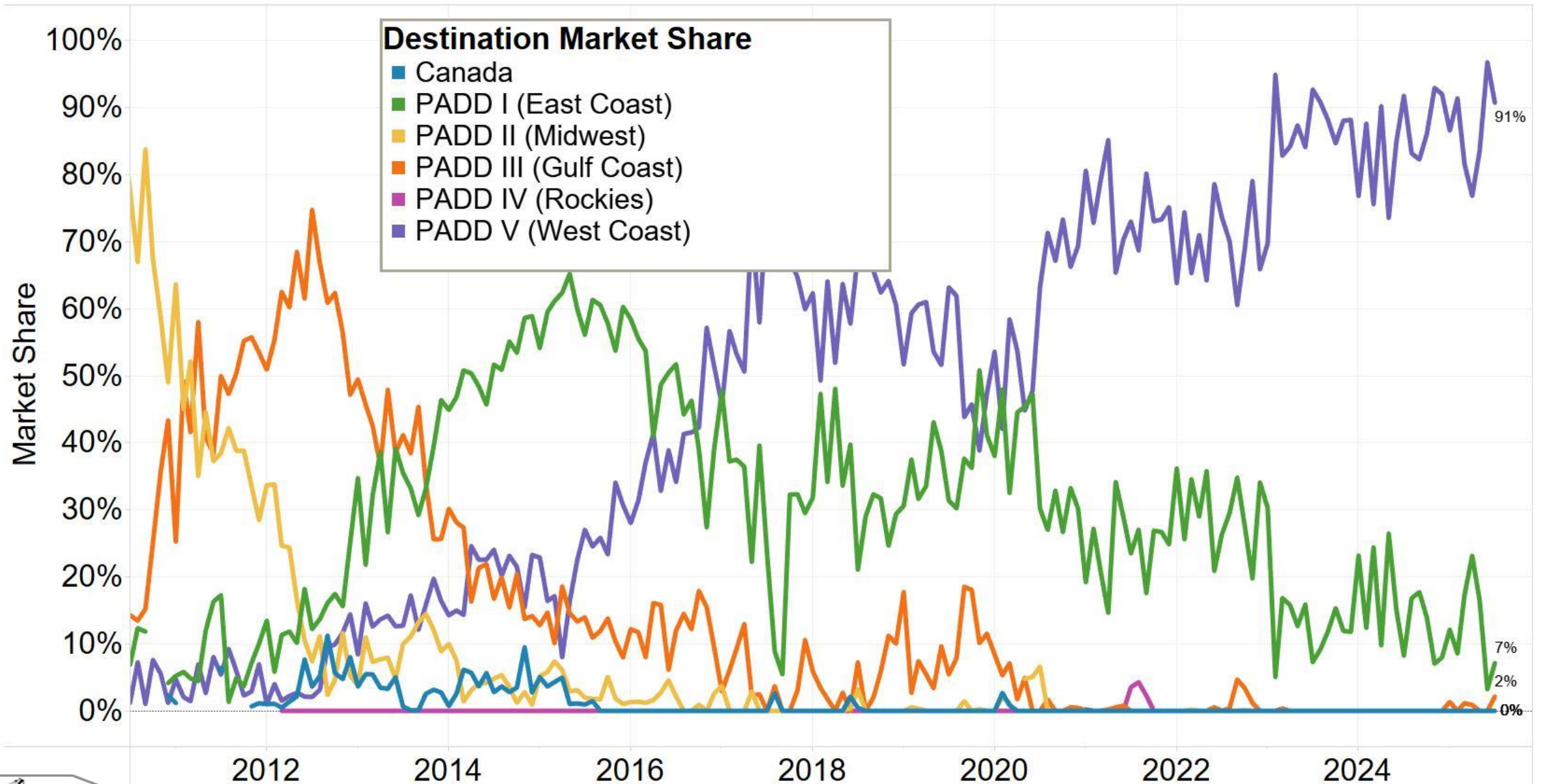
Estimated Williston Basin Oil Transportation



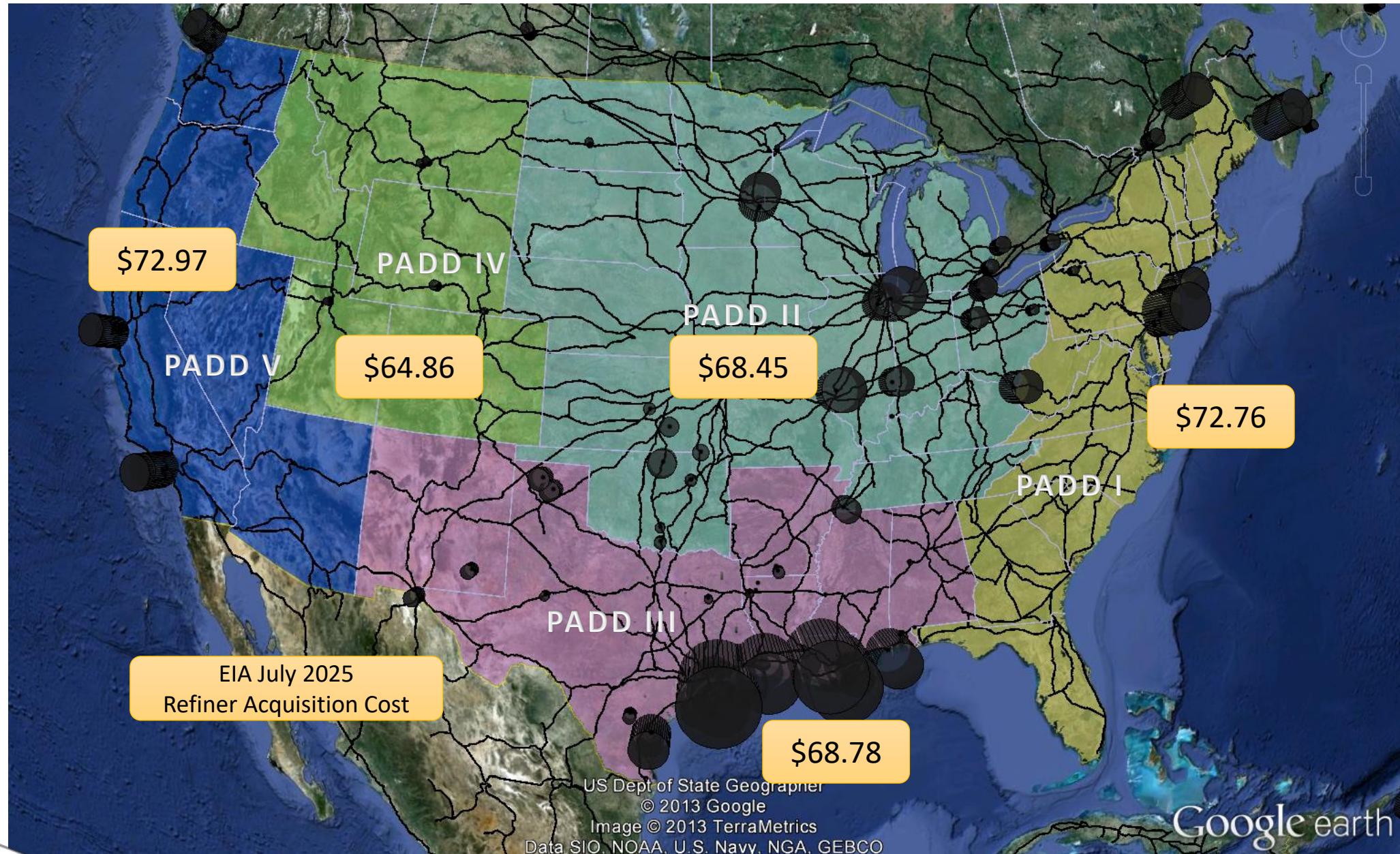
Estimated ND Rail Export Volumes



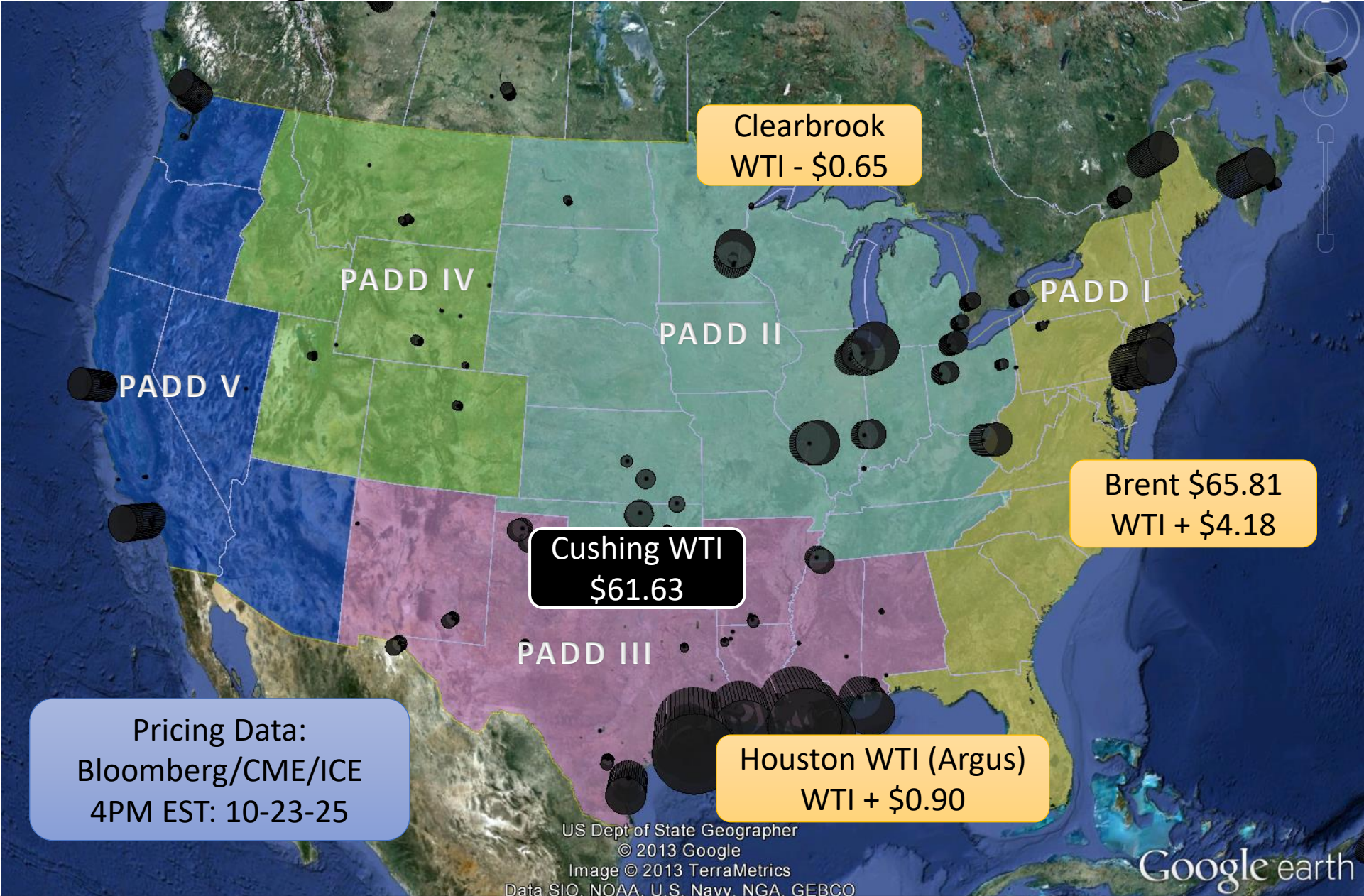
Rail Destinations Market Share (July 2025)



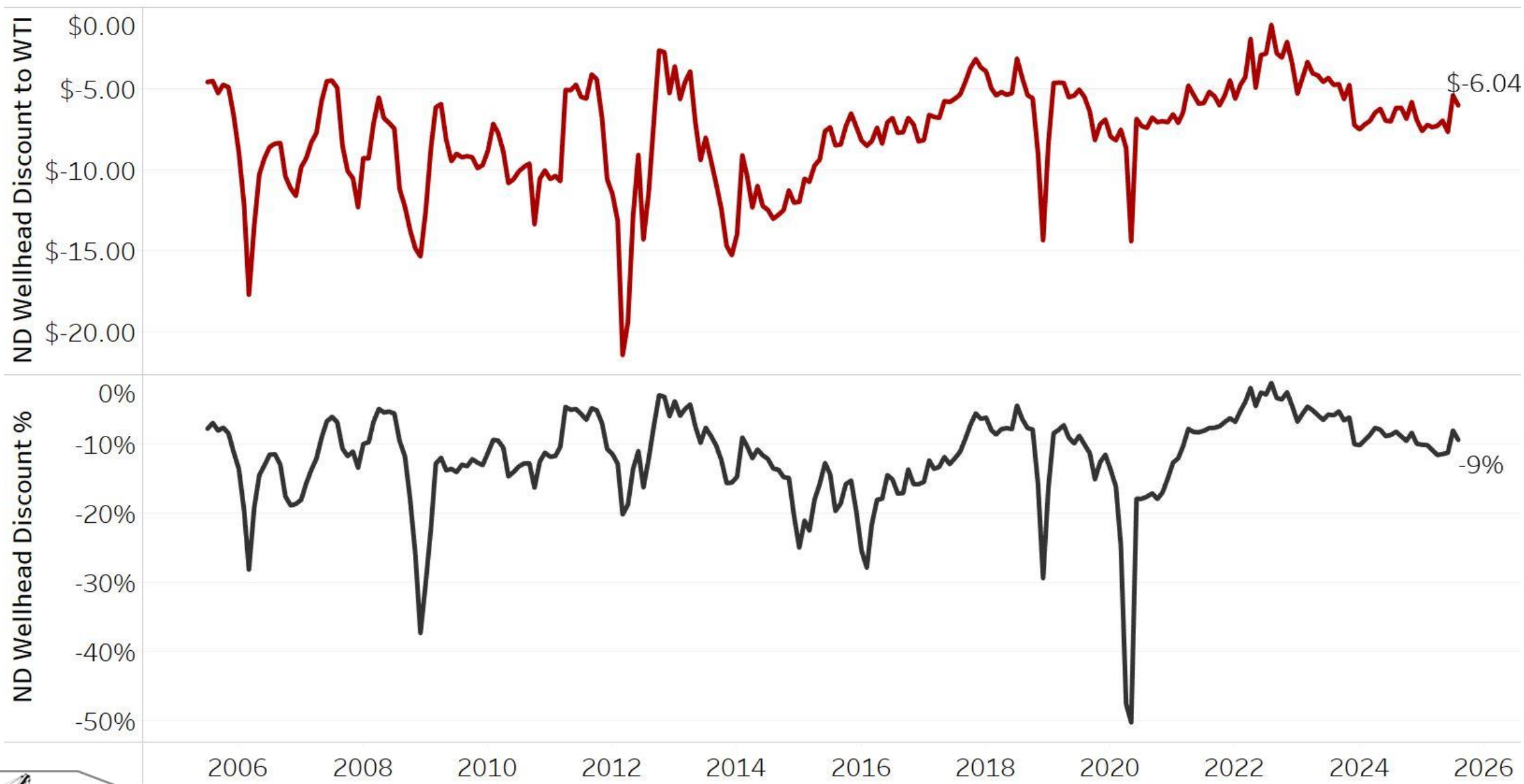
Major Rail Lines and Refineries



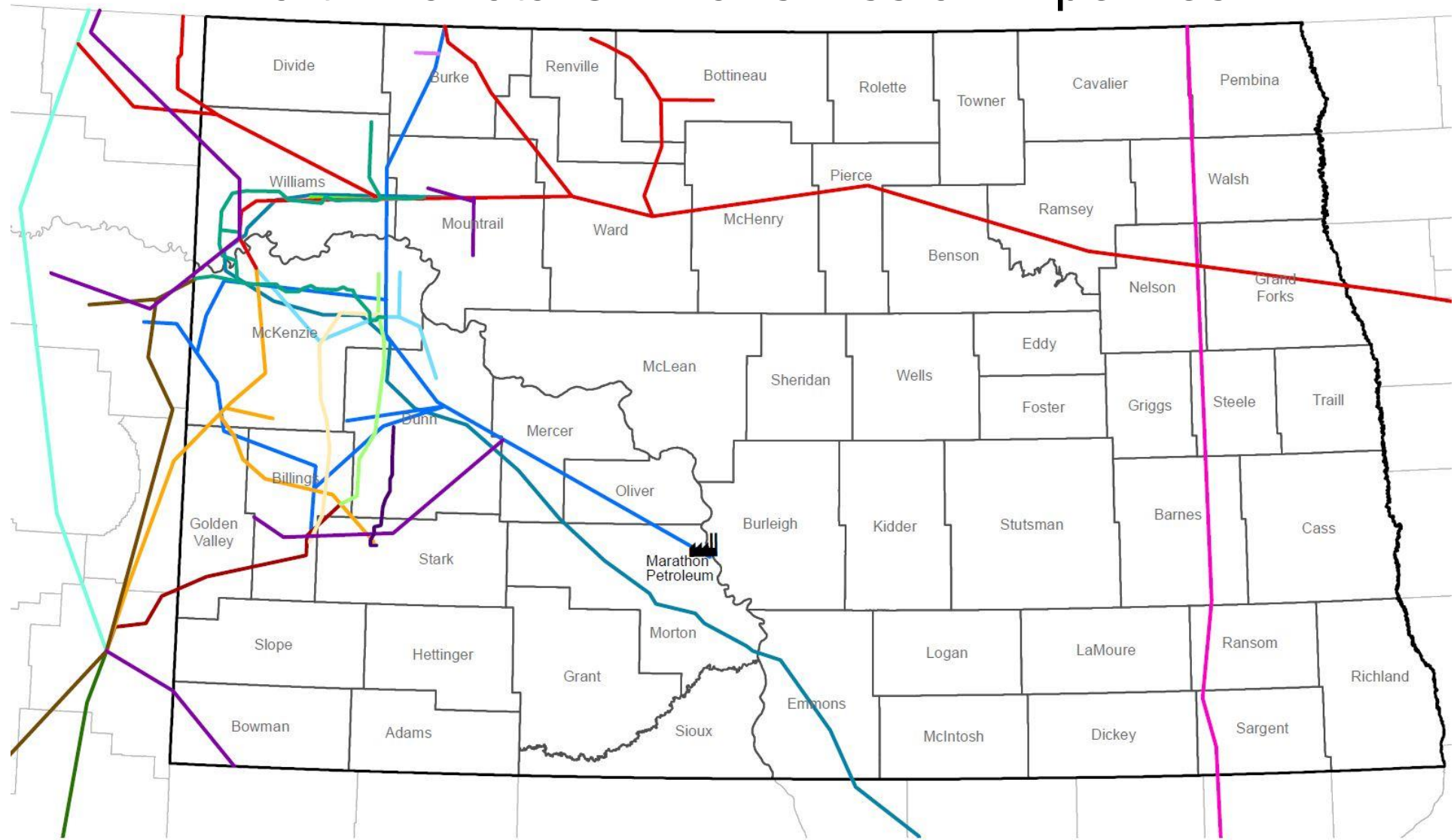
Major Pricing Benchmarks & Refining Centers



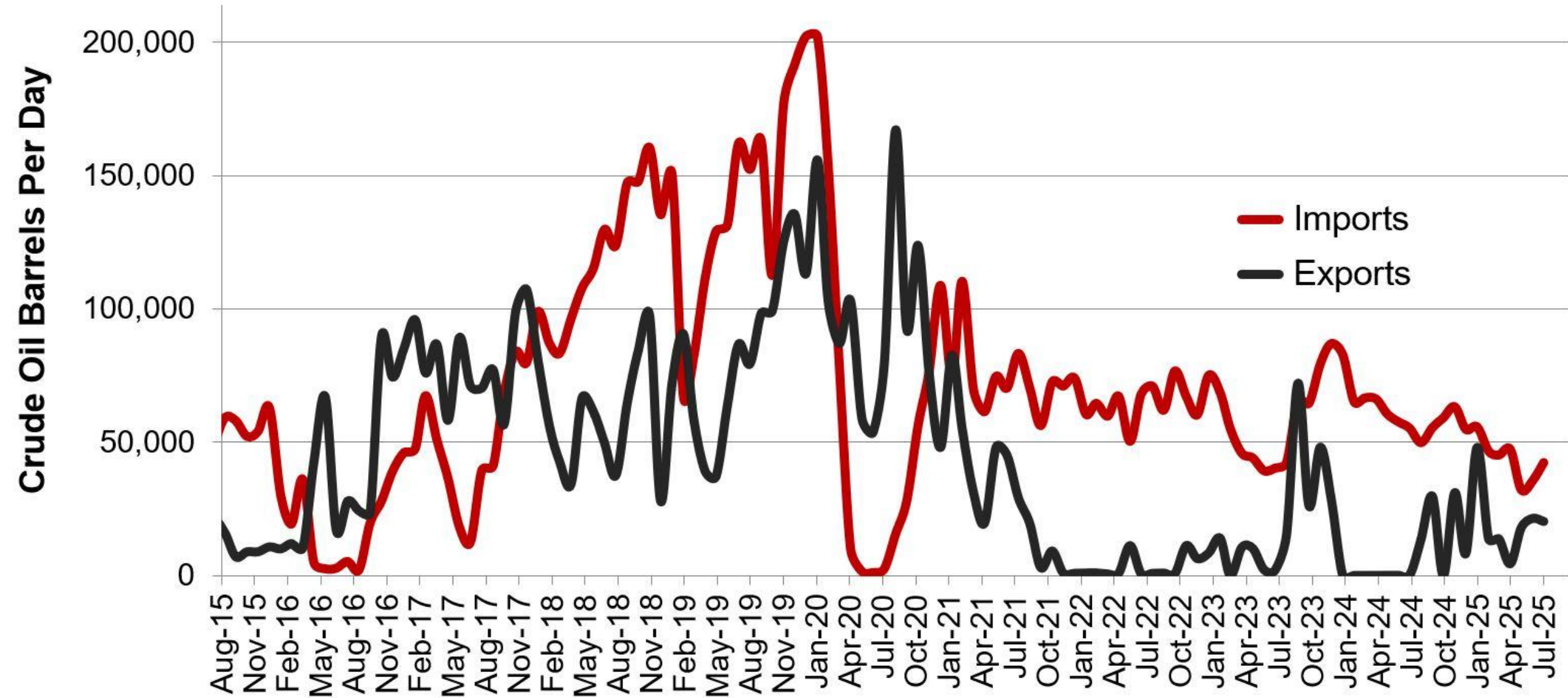
Average North Dakota Oil “Discount” to WTI



North Dakota Oil Transmission Pipelines



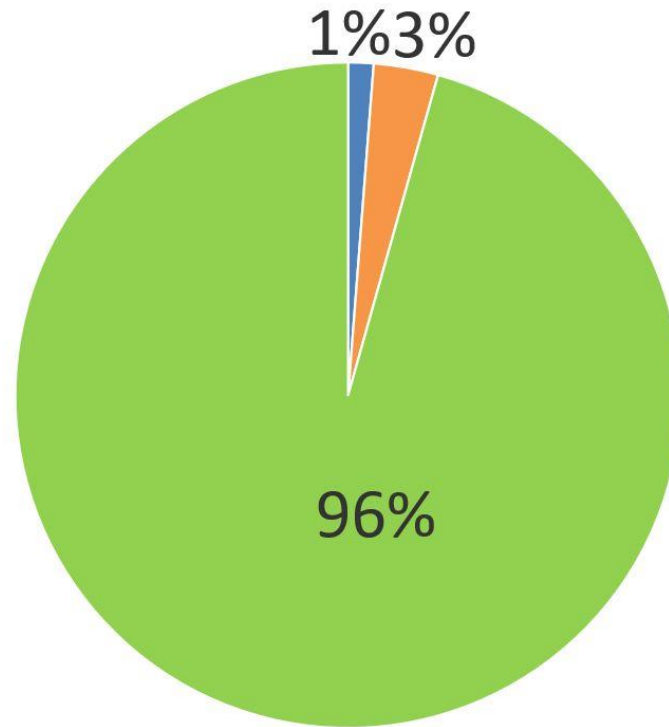
Williston Basin Truck/Rail Imports and Exports with Canada



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.

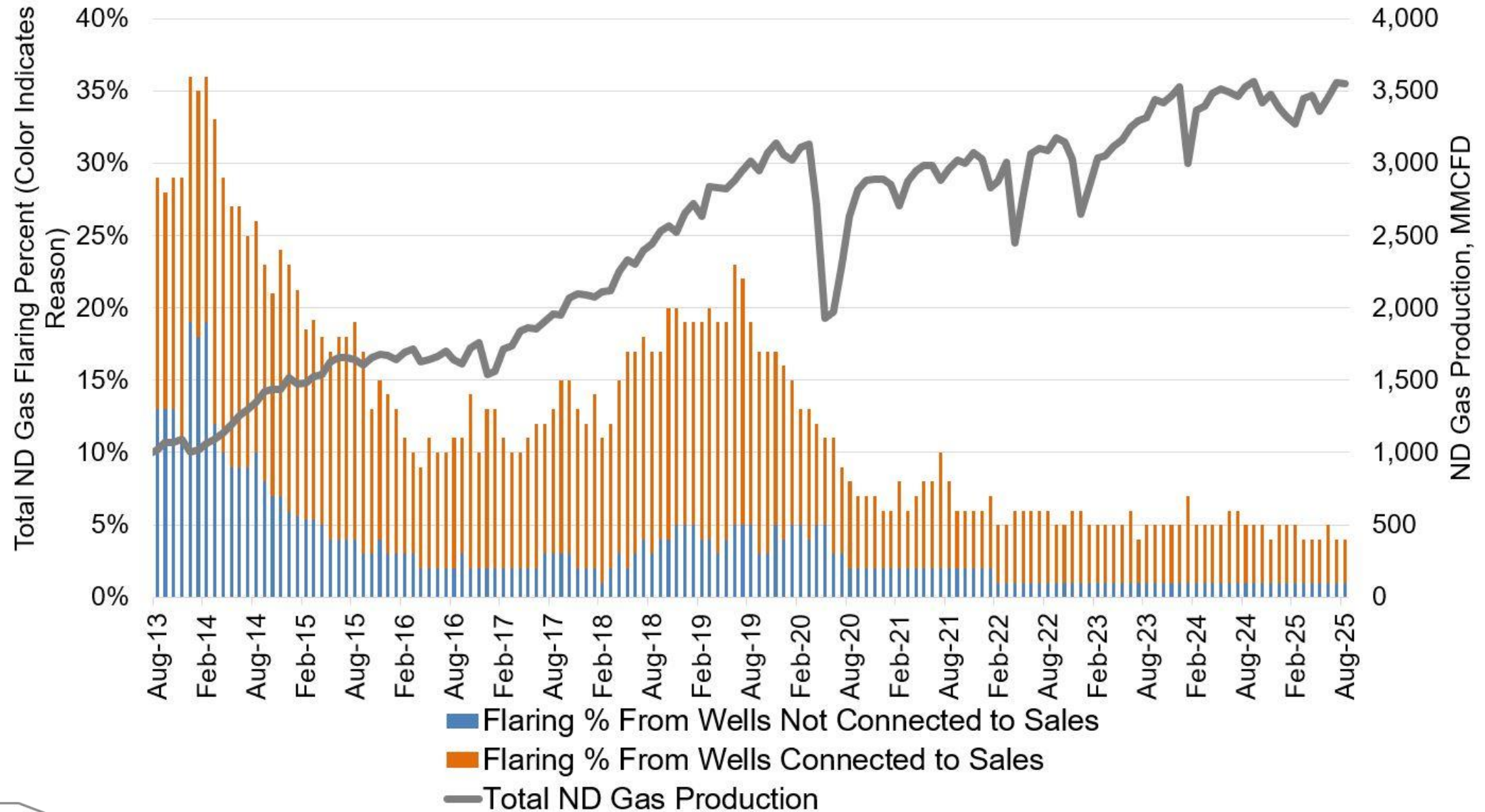
Simple Terms

Blue – Lack of pipelines
Orange – Challenges on existing infrastructure

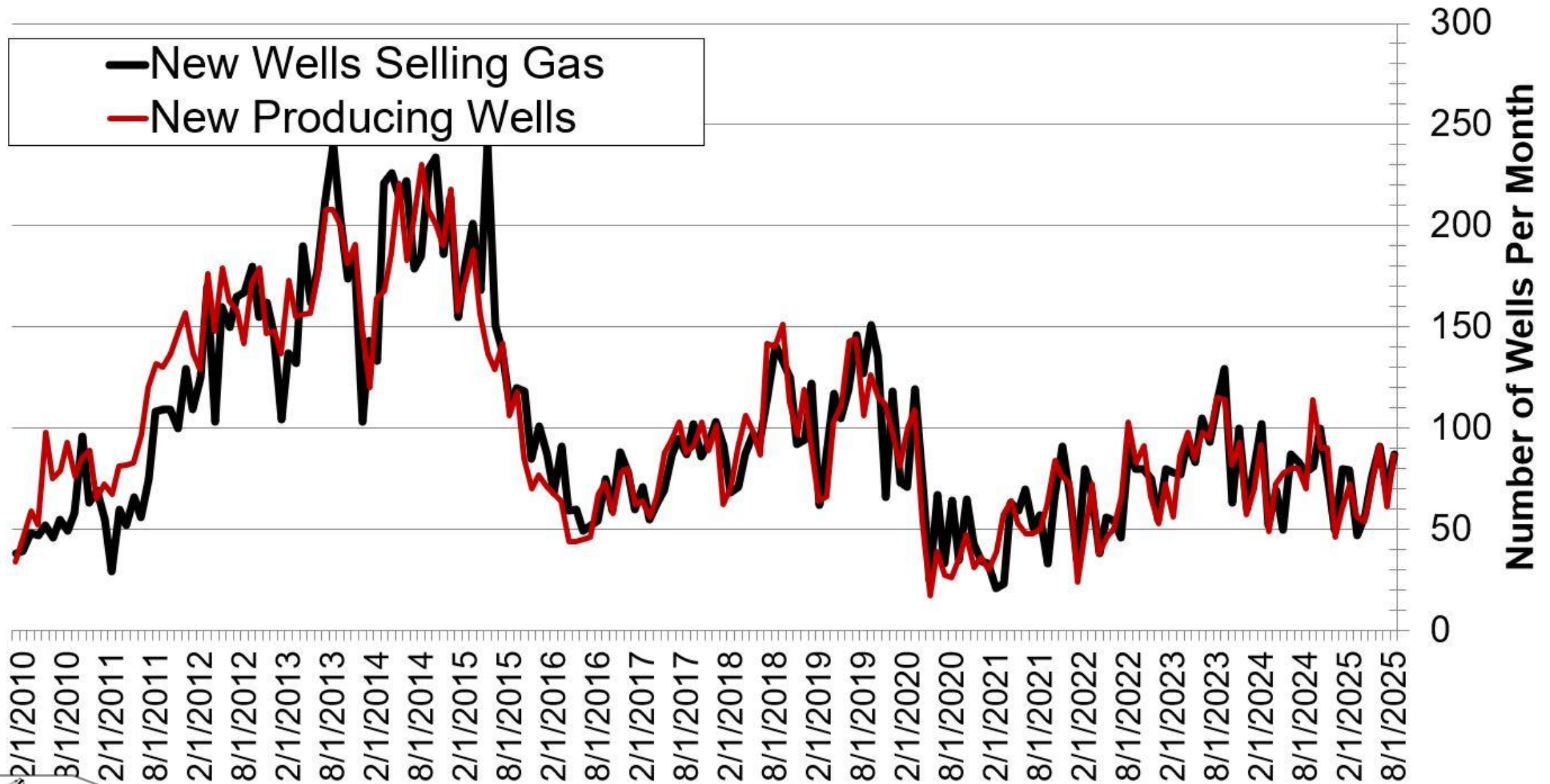
August 2025 Data – Non-Confidential Wells



Solving the Flaring Challenge



Solving the Flaring Challenge



EIA Oil Price Outlook (October 2025)

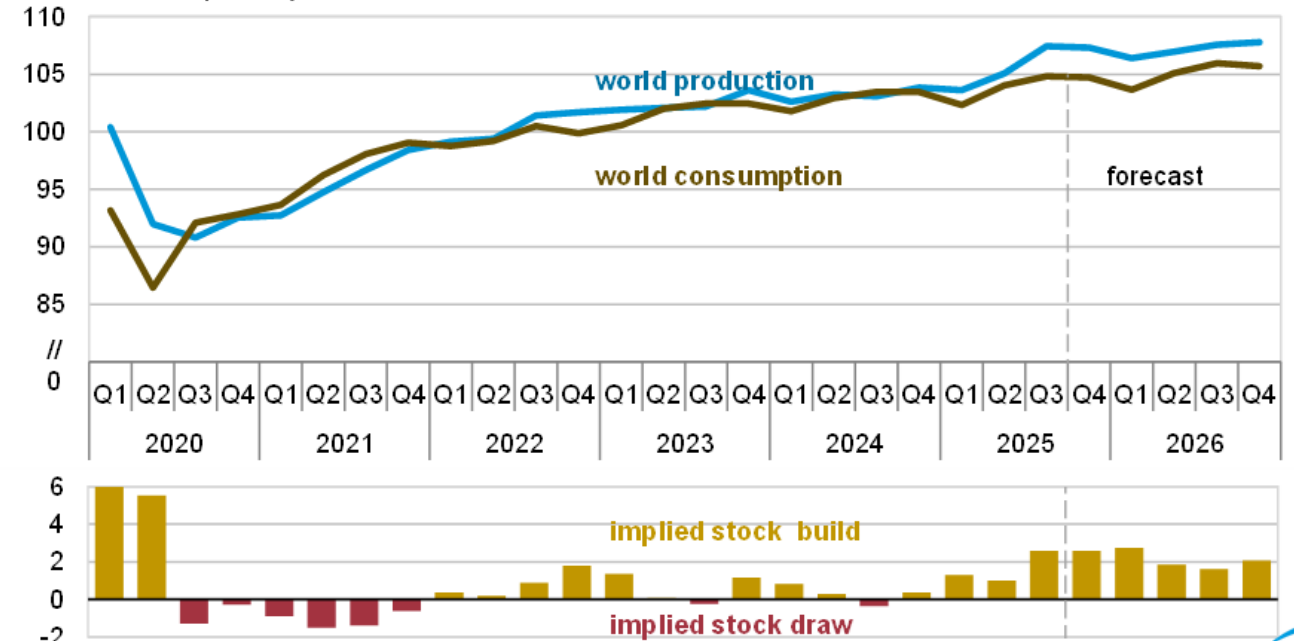
West Texas Intermediate (WTI) crude oil price
dollars per barrel



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



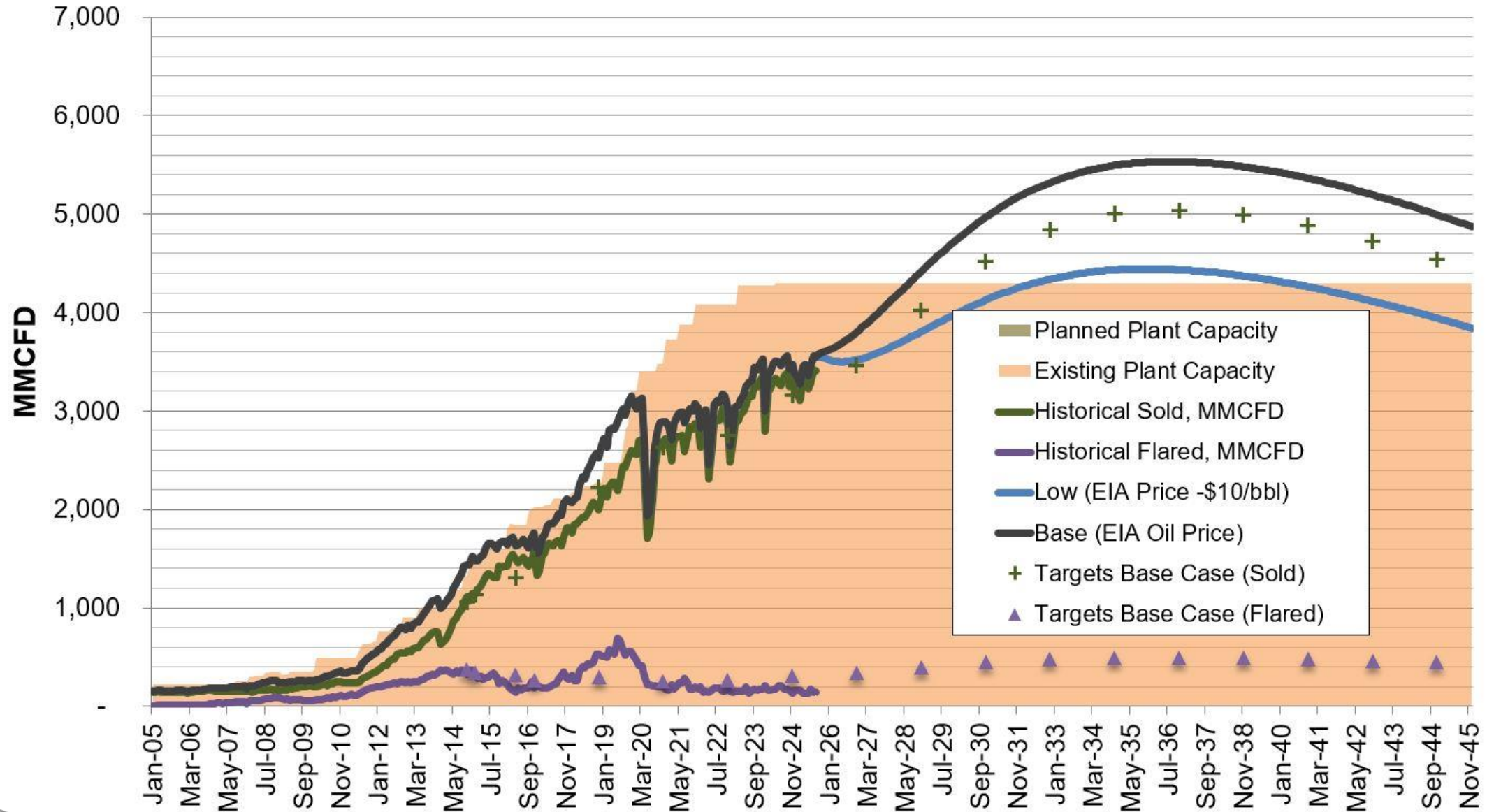
World liquid fuels production and consumption balance
million barrels per day



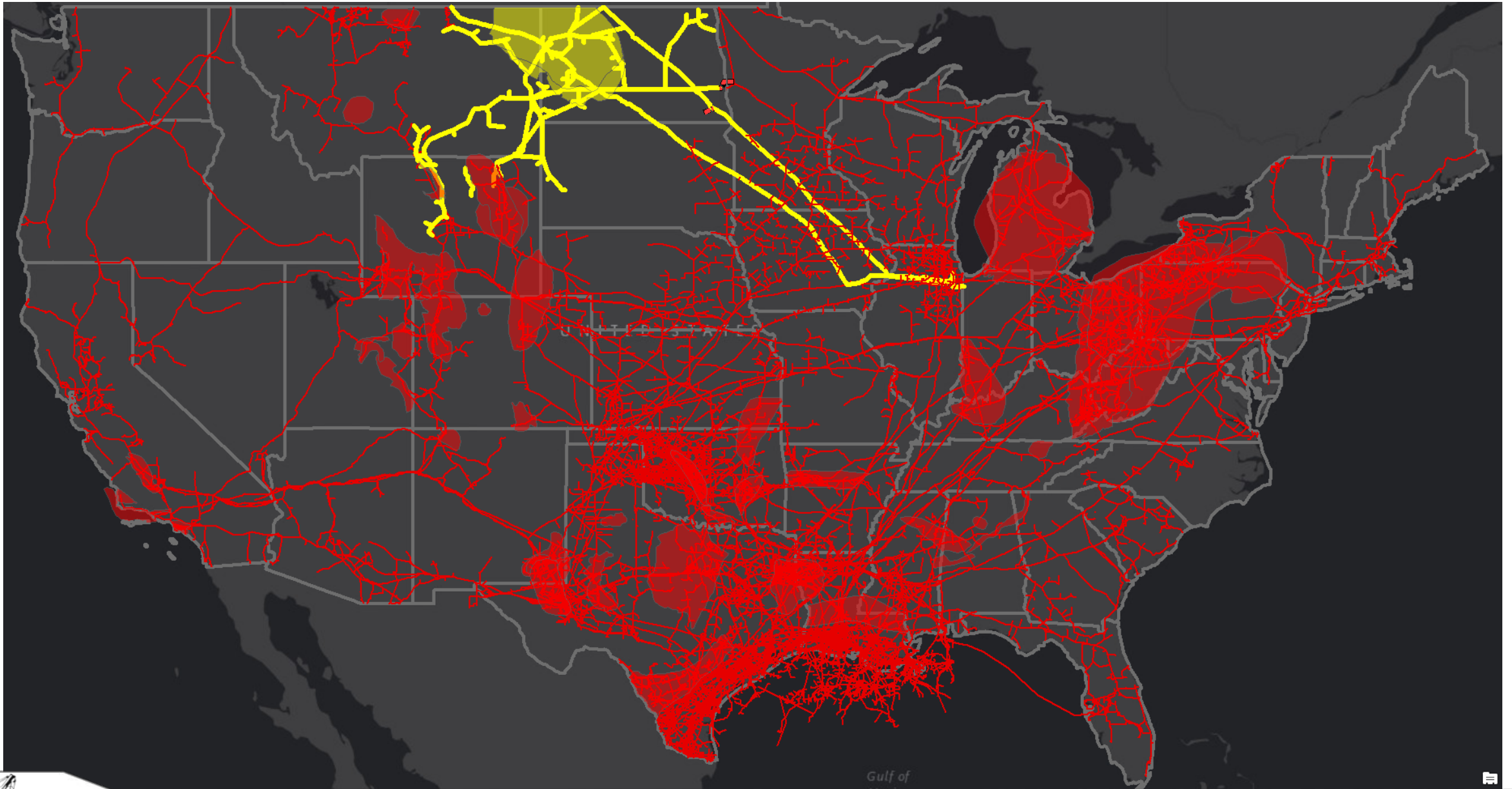
Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, October 2025



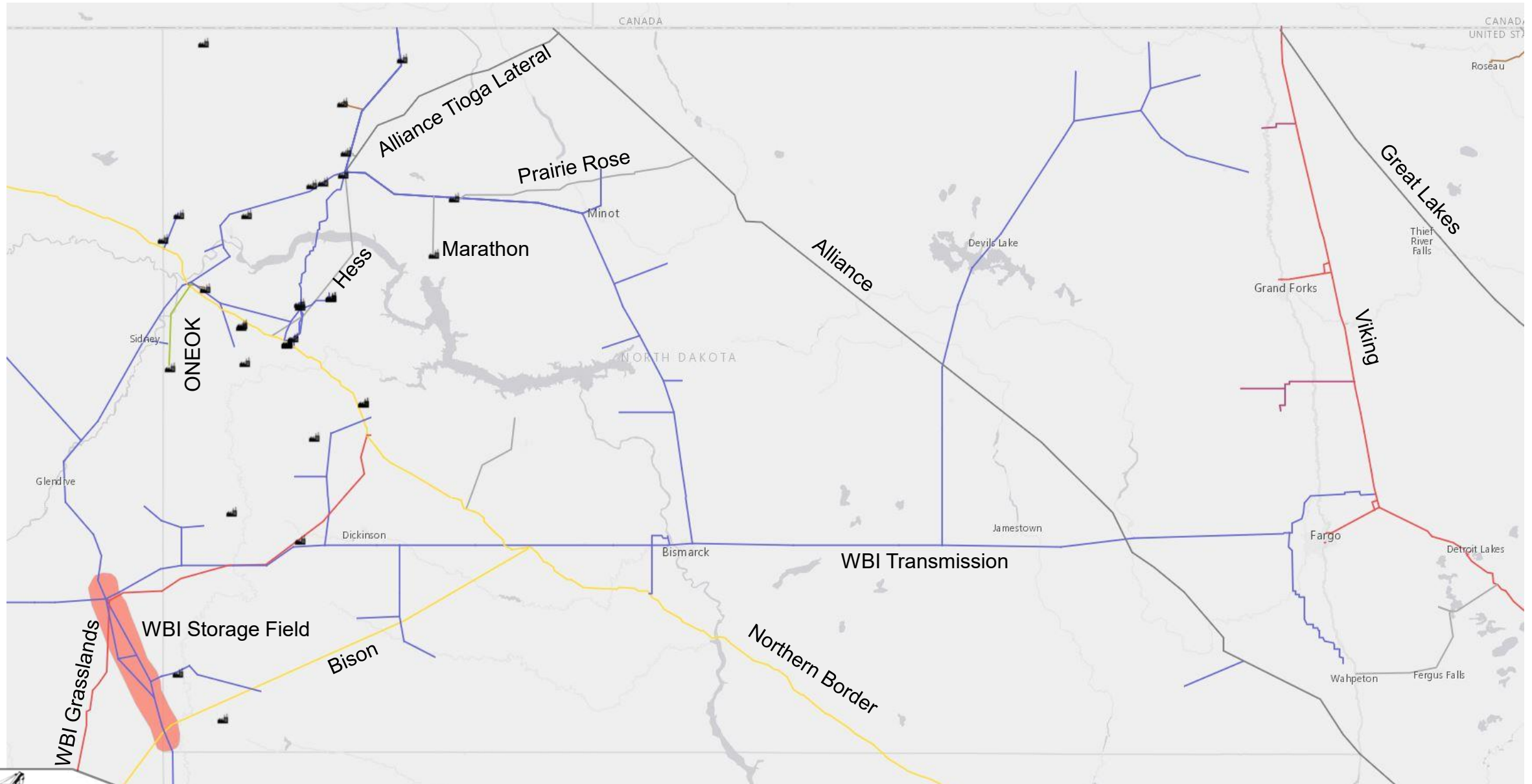
North Dakota Gas Processing Outlook



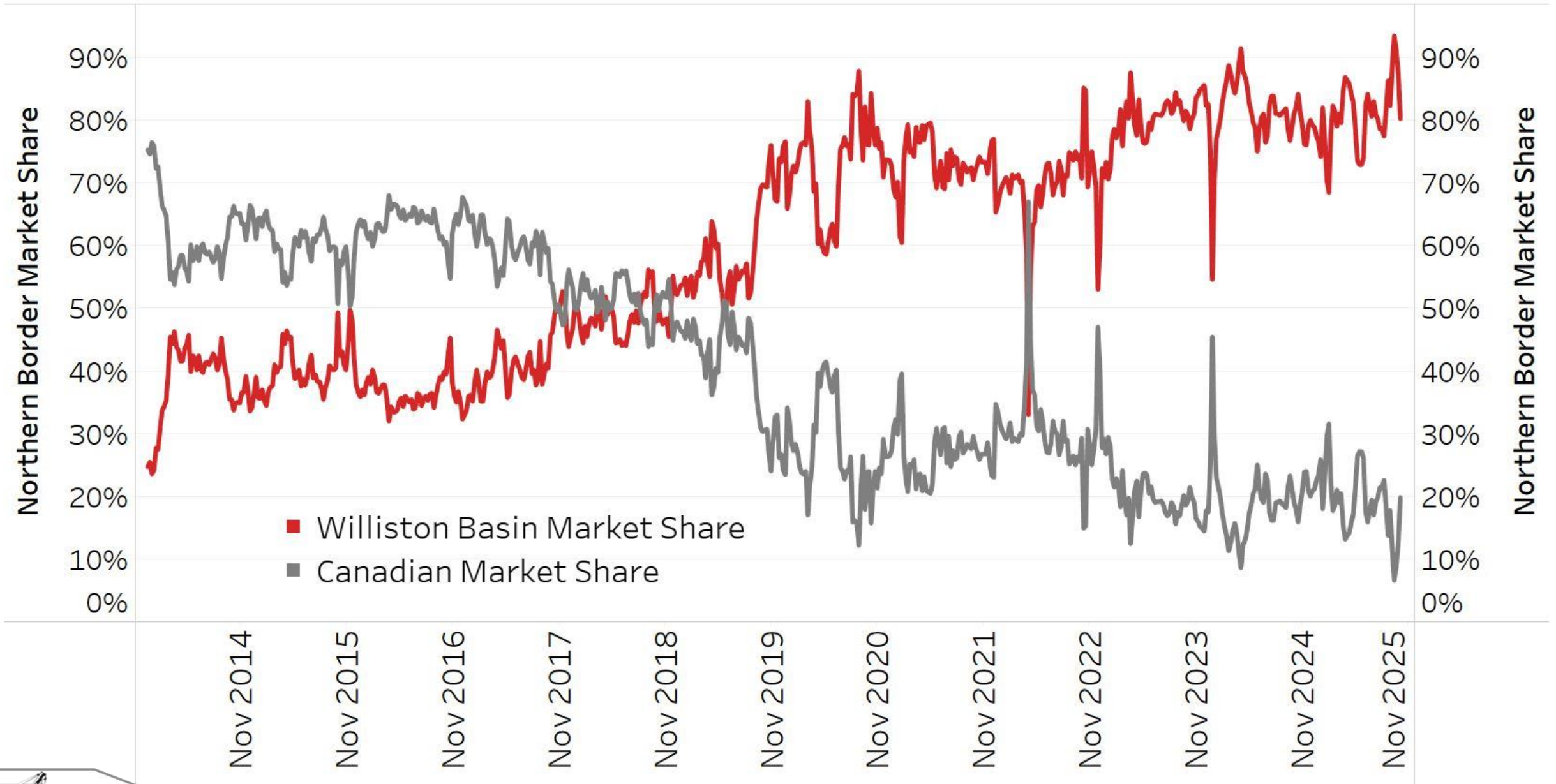
Bakken Natural Gas Infrastructure



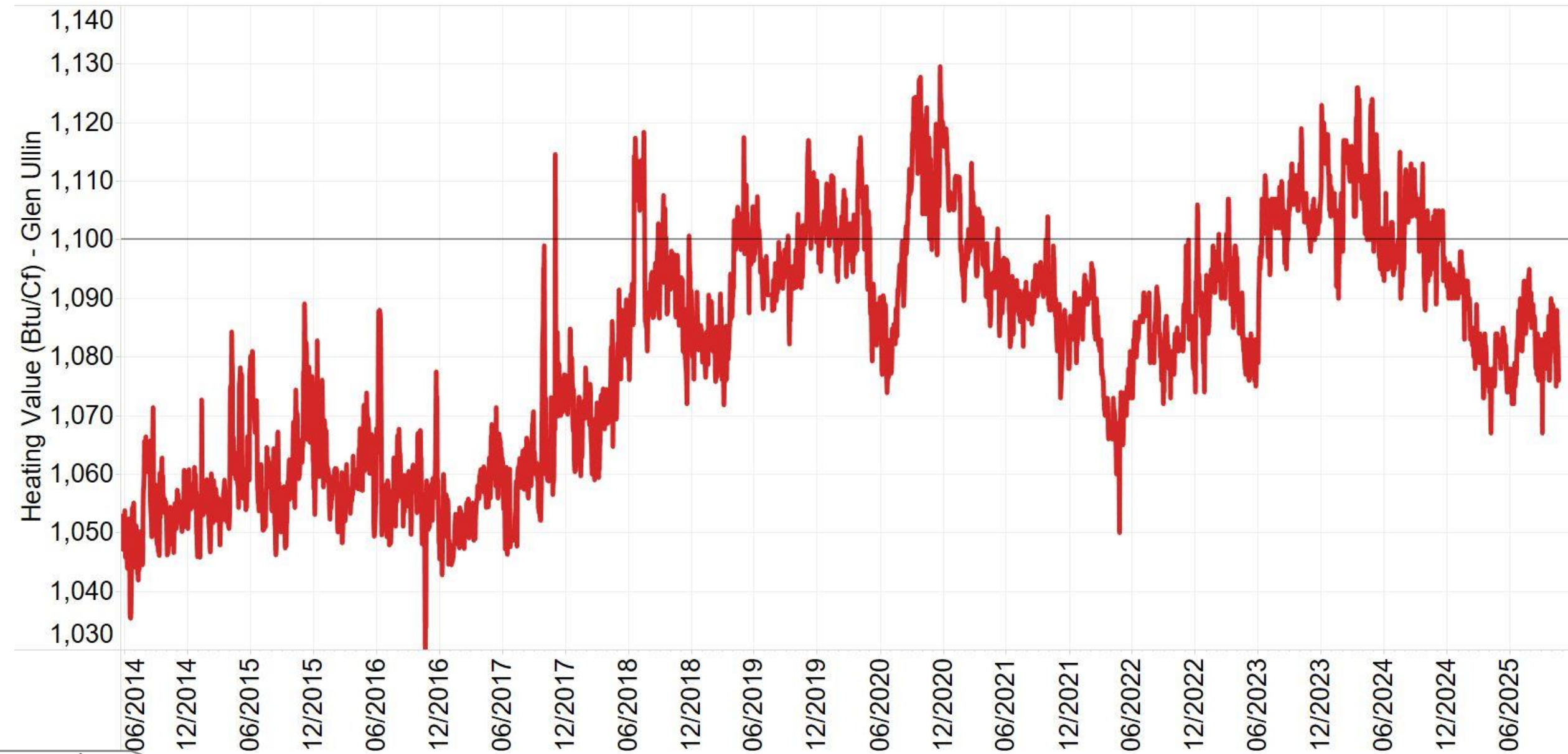
Major Residue Gas Pipeline Infrastructure



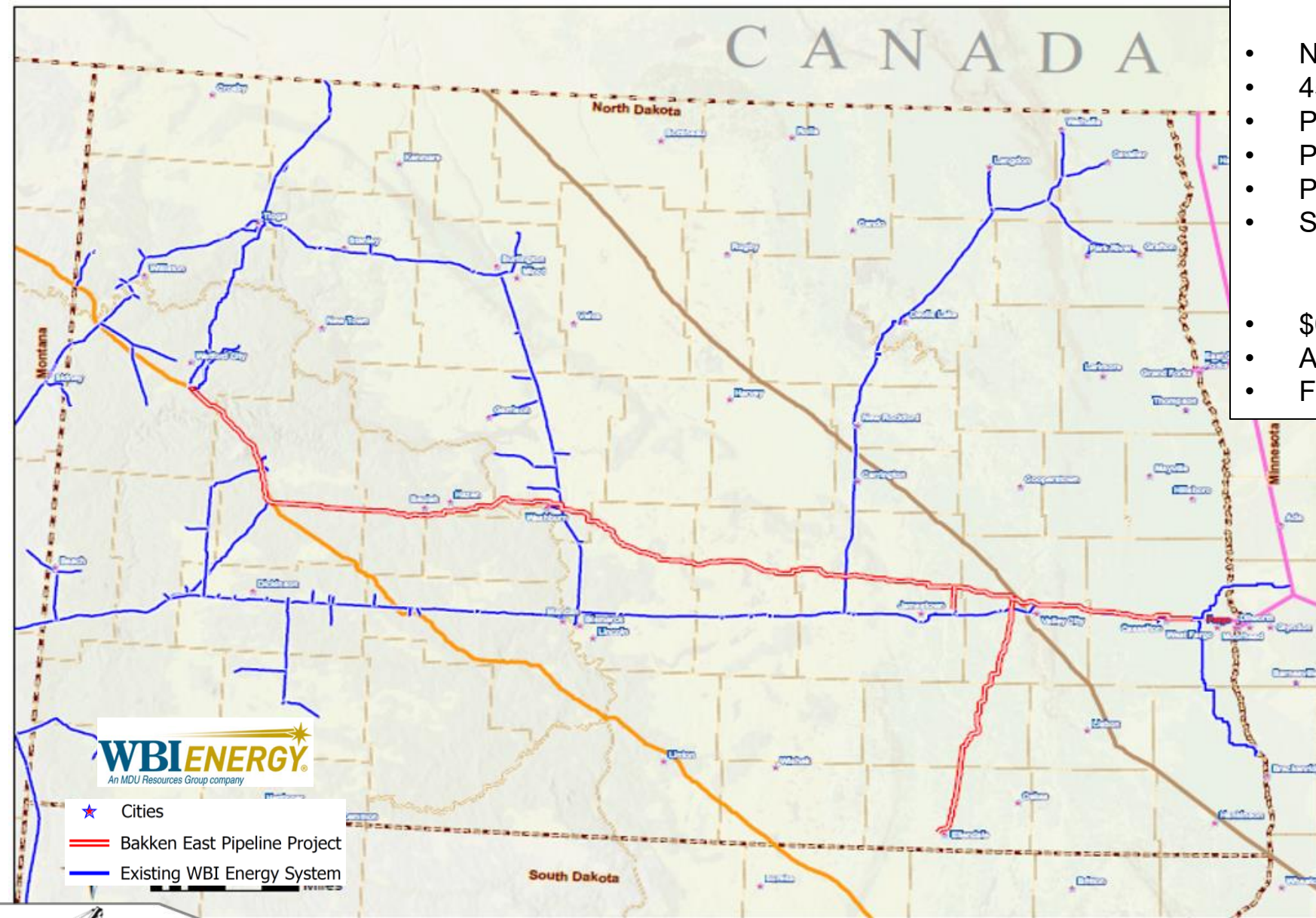
Northern Border Pipeline Market Share



Northern Border BTU at Glen Ullin, ND



WBI Energy: Proposed Bakken East Project



Natural Gas Pipeline Project Highlights

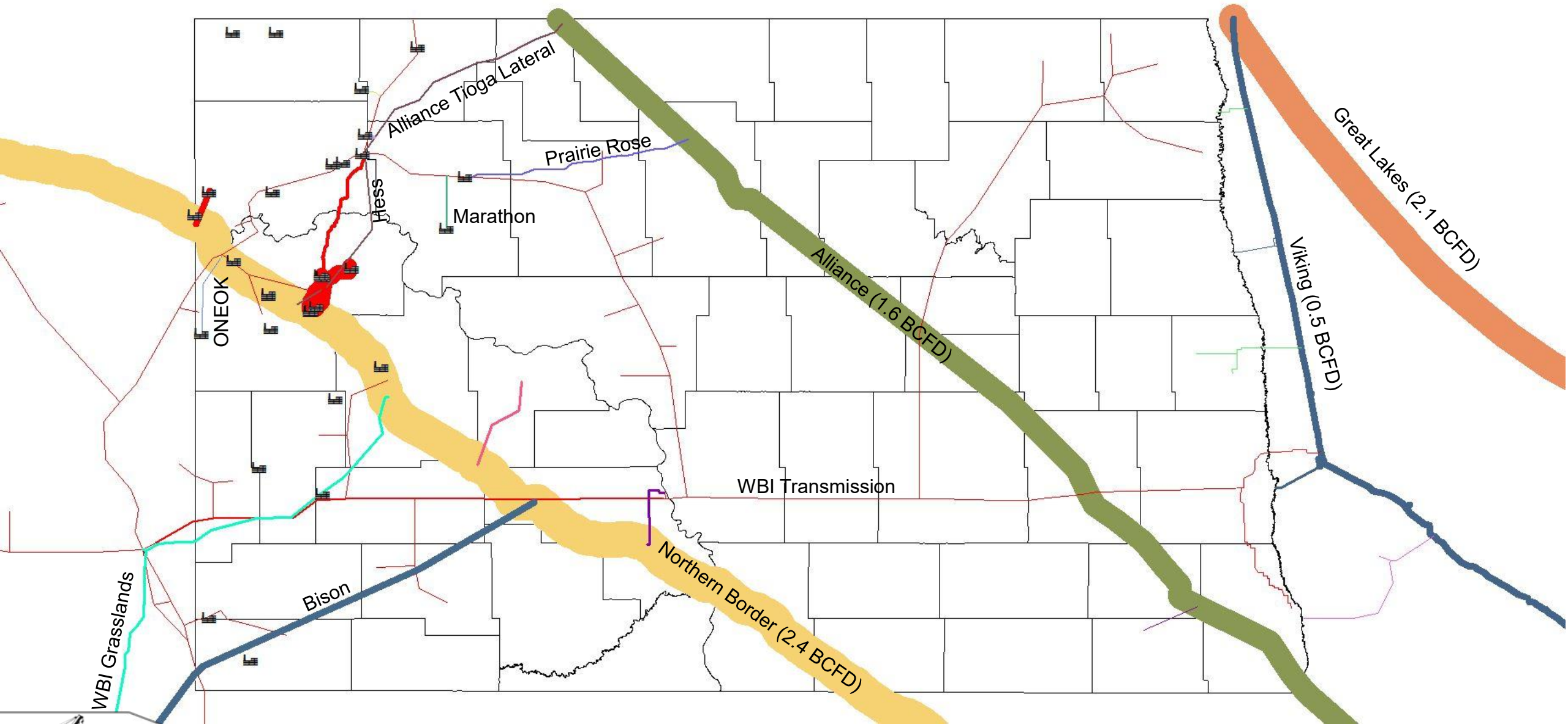
- Non-binding open season Dec 16 – Jan 31, 2025
- 455 Miles: 36", 30", & 20" Pipe
- Proposed Capacity (East) 1,000,000 Dth/Day
- Phase 1 (West) : Nov 2029 targeted in-service
- Phase 2 (East) : Nov 2030 targeted in-service
- Seeking commitments 20yrs or Longer

Estimated Rates

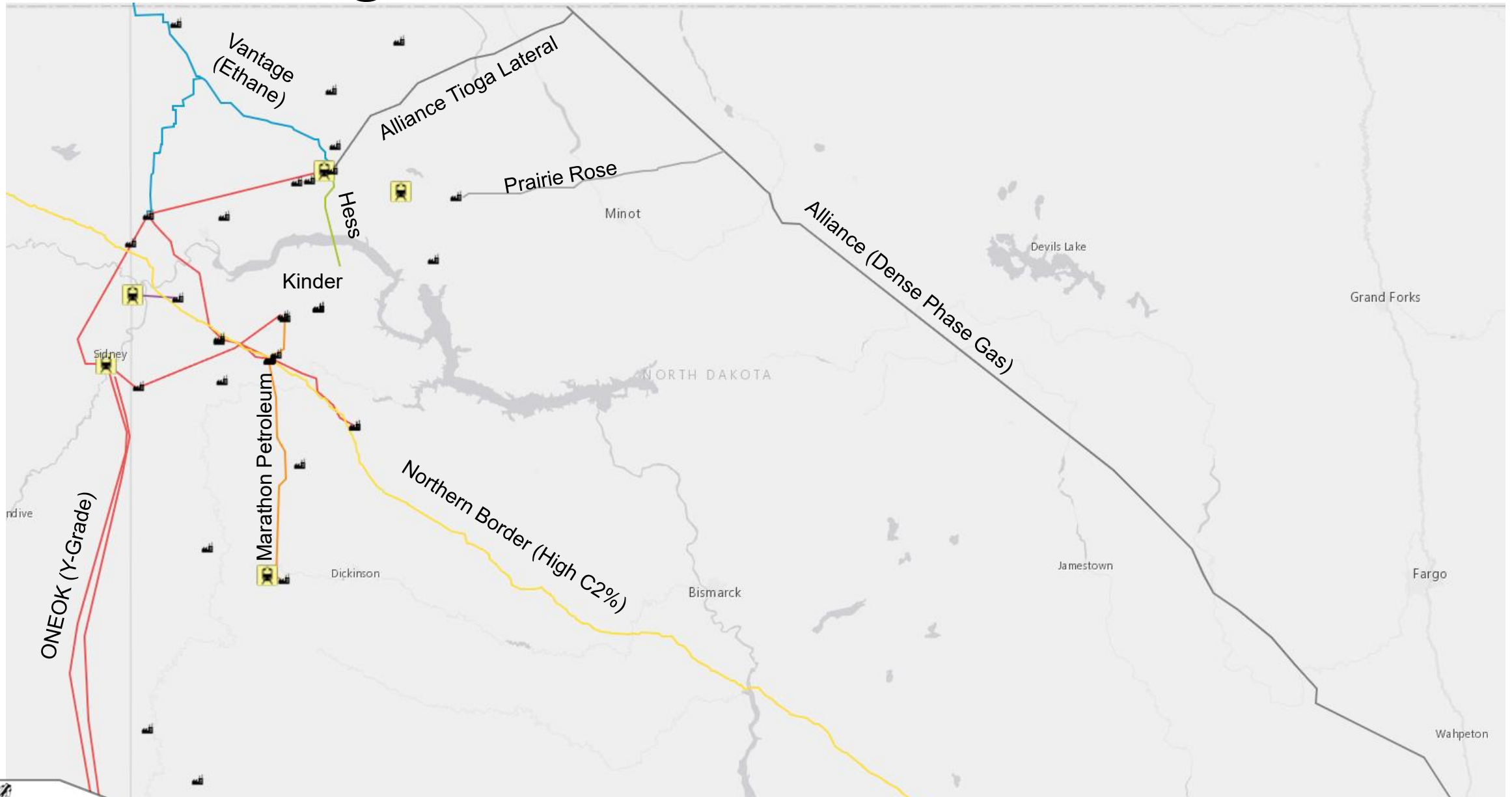
- \$0.85 to \$0.90/Dth + Fuel/Electric/Commodity
- Anchor Shipper Minimum: 100,000 Dth/Day
- Foundation Shipper Minimum: 250,000 Dth/Day



Residue Gas Pipeline Capacity Visualization



Regional NGL Infrastructure



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