

Pipeline Authority Monthly Update

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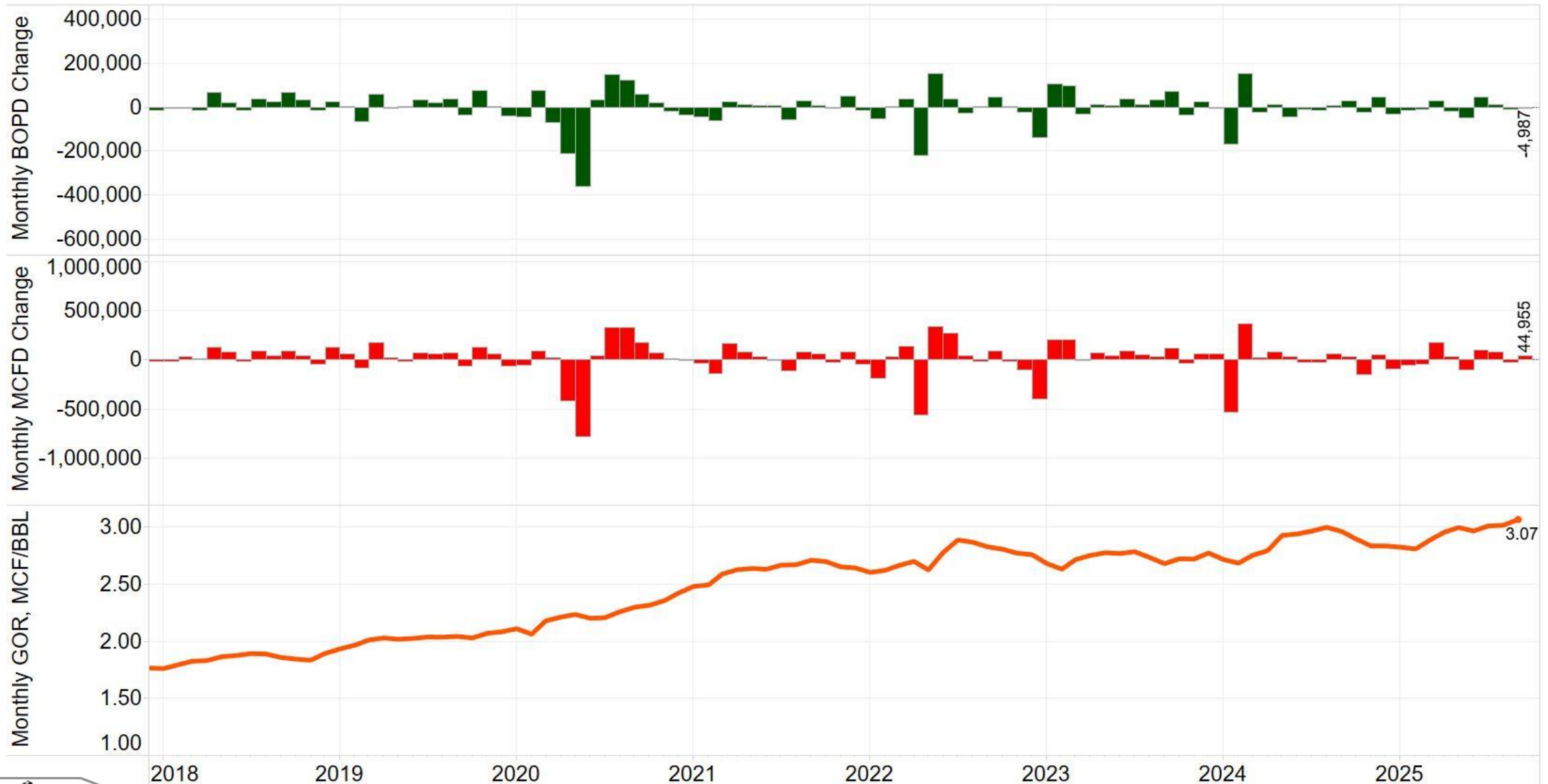
November 21, 2025

US Williston Basin Oil Production - 2025

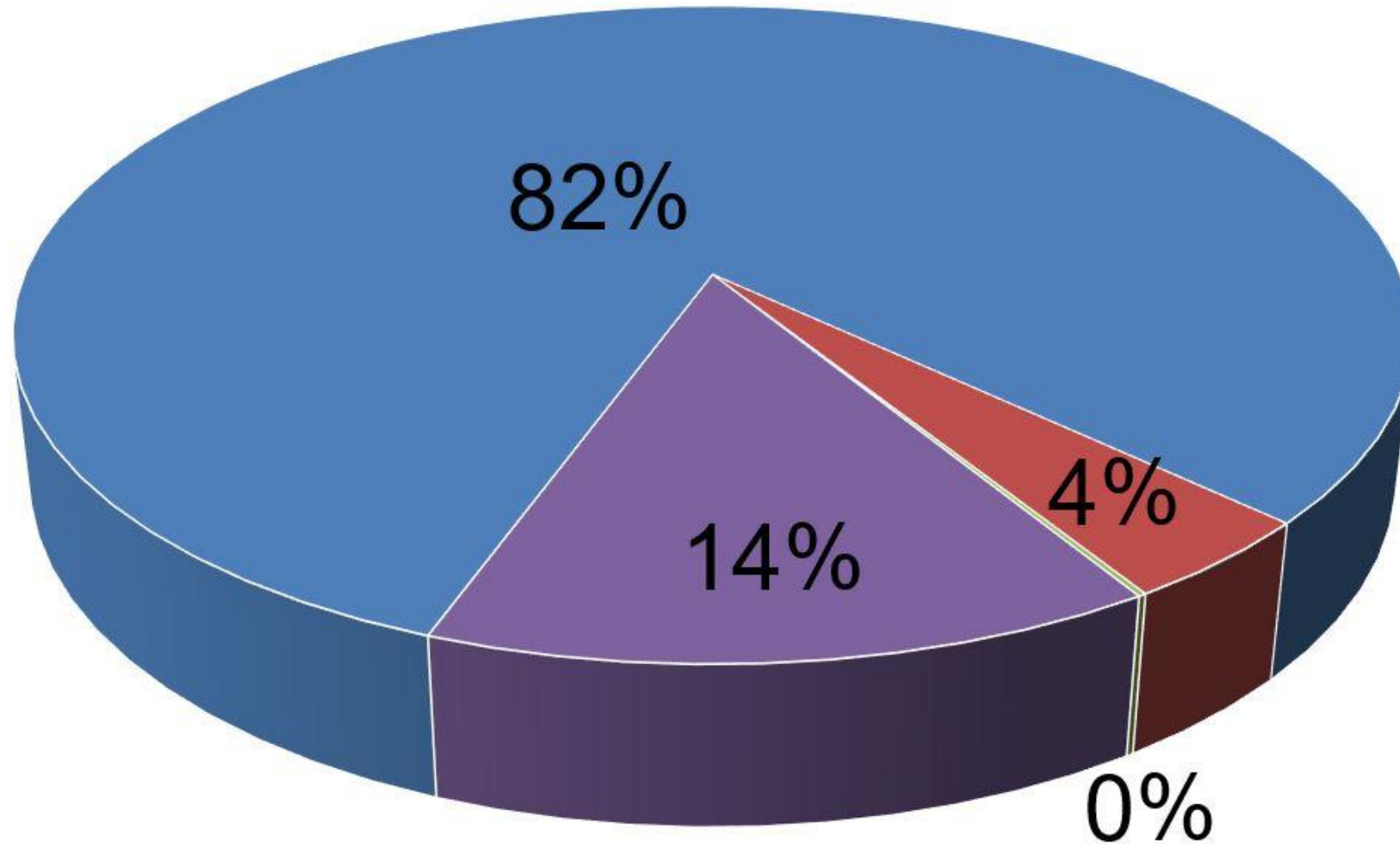
MONTH	ND	Eastern MT*	SD	TOTAL
January	1,175,483	74,977	2,281	1,252,741
February	1,164,904	71,717	2,282	1,238,903
March	1,194,699	76,008	2,272	1,272,979
April	1,175,671	74,879	2,294	1,252,844
May	1,126,252	79,632	2,295	1,208,179
June	1,171,907	79,638	2,145	1,253,690
July	1,181,133	80,186	2,271	1,263,590
August	1,170,890	75,751	2,218	1,248,859
September	1,165,903			
October				
November				
December				



North Dakota Monthly Production Change



Estimated Williston Basin Oil Transportation



■ Pipeline Export

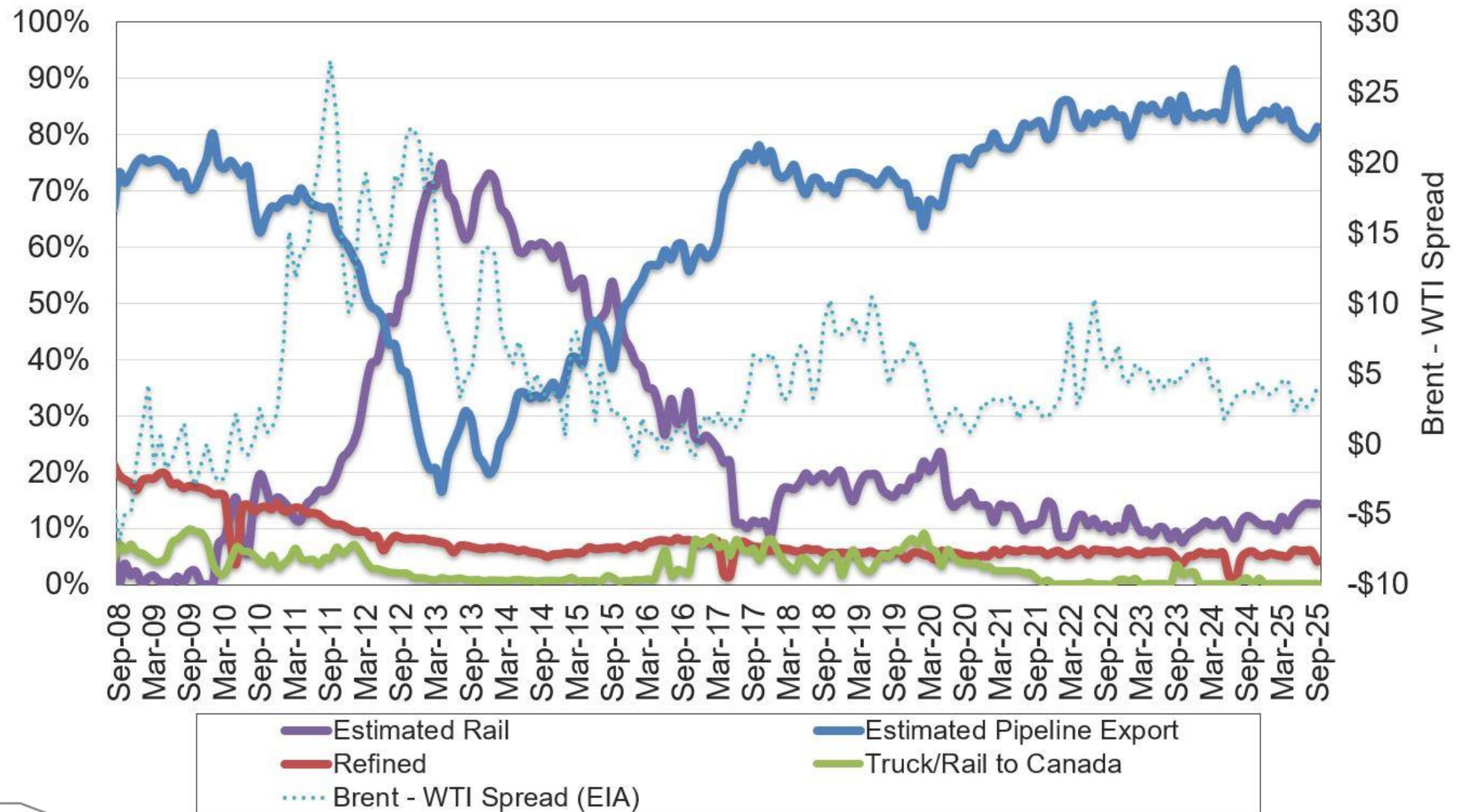
■ Truck/Rail to Canada

■ Refined

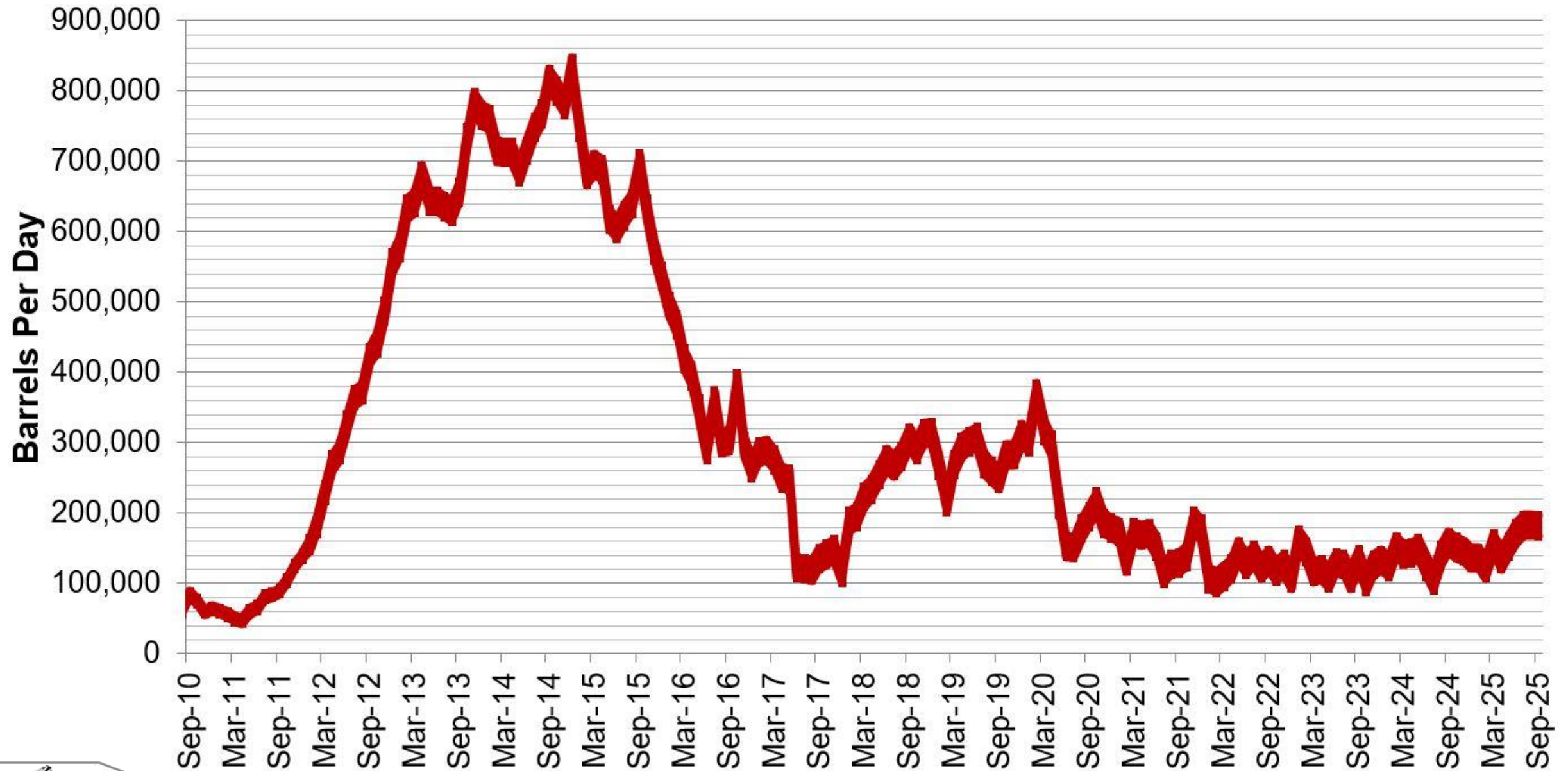
■ Estimated Rail



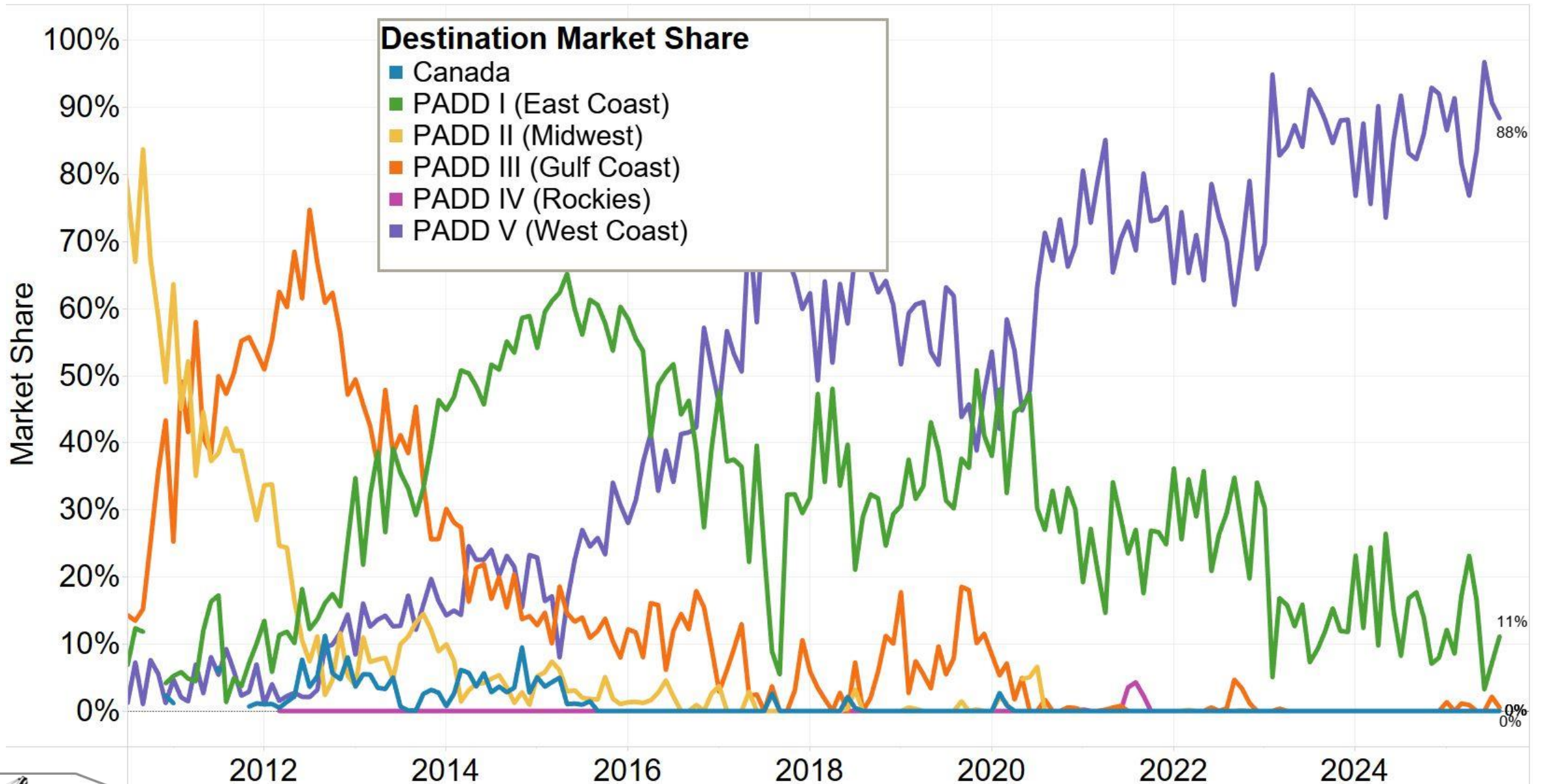
Estimated Williston Basin Oil Transportation



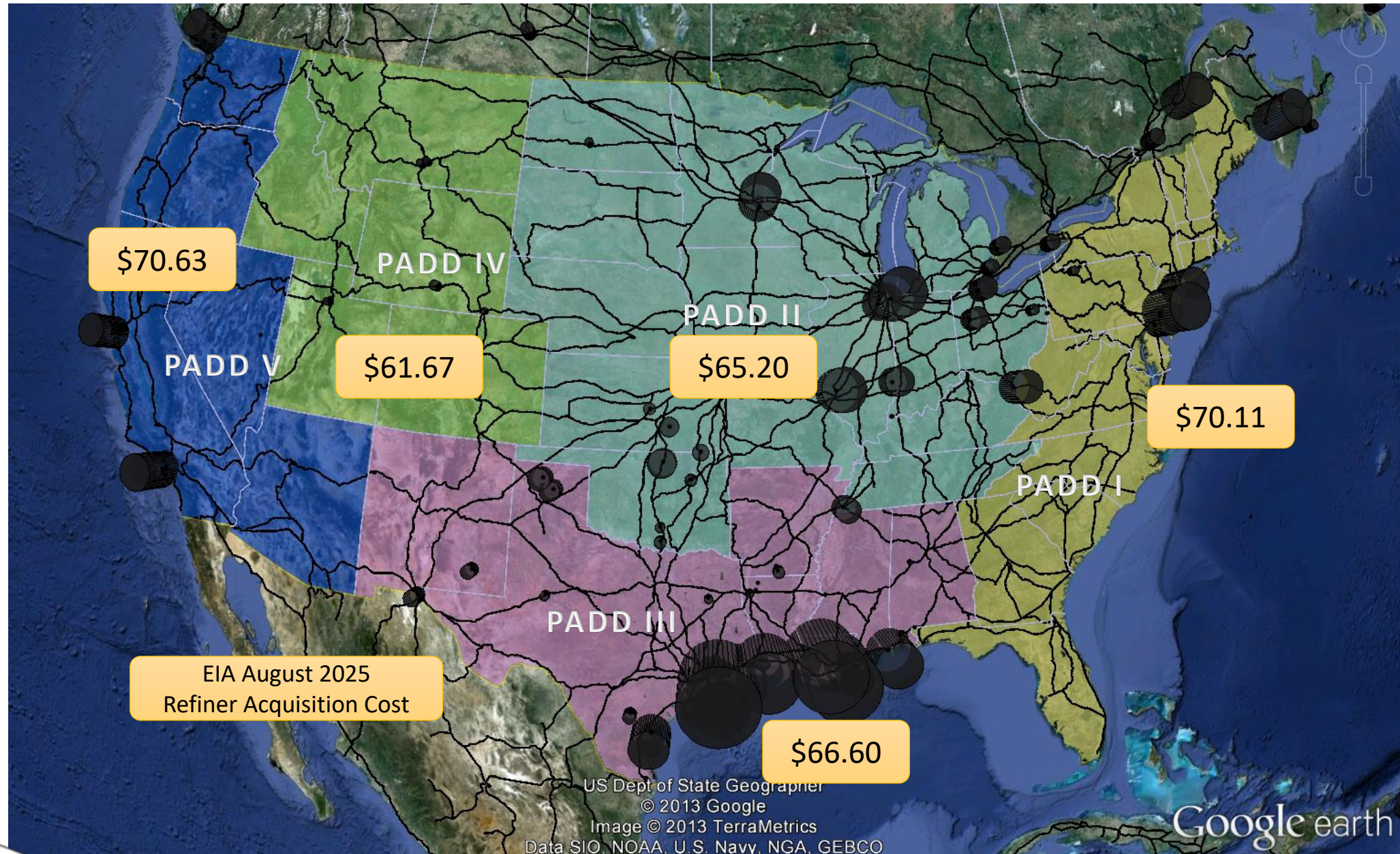
Estimated ND Rail Export Volumes



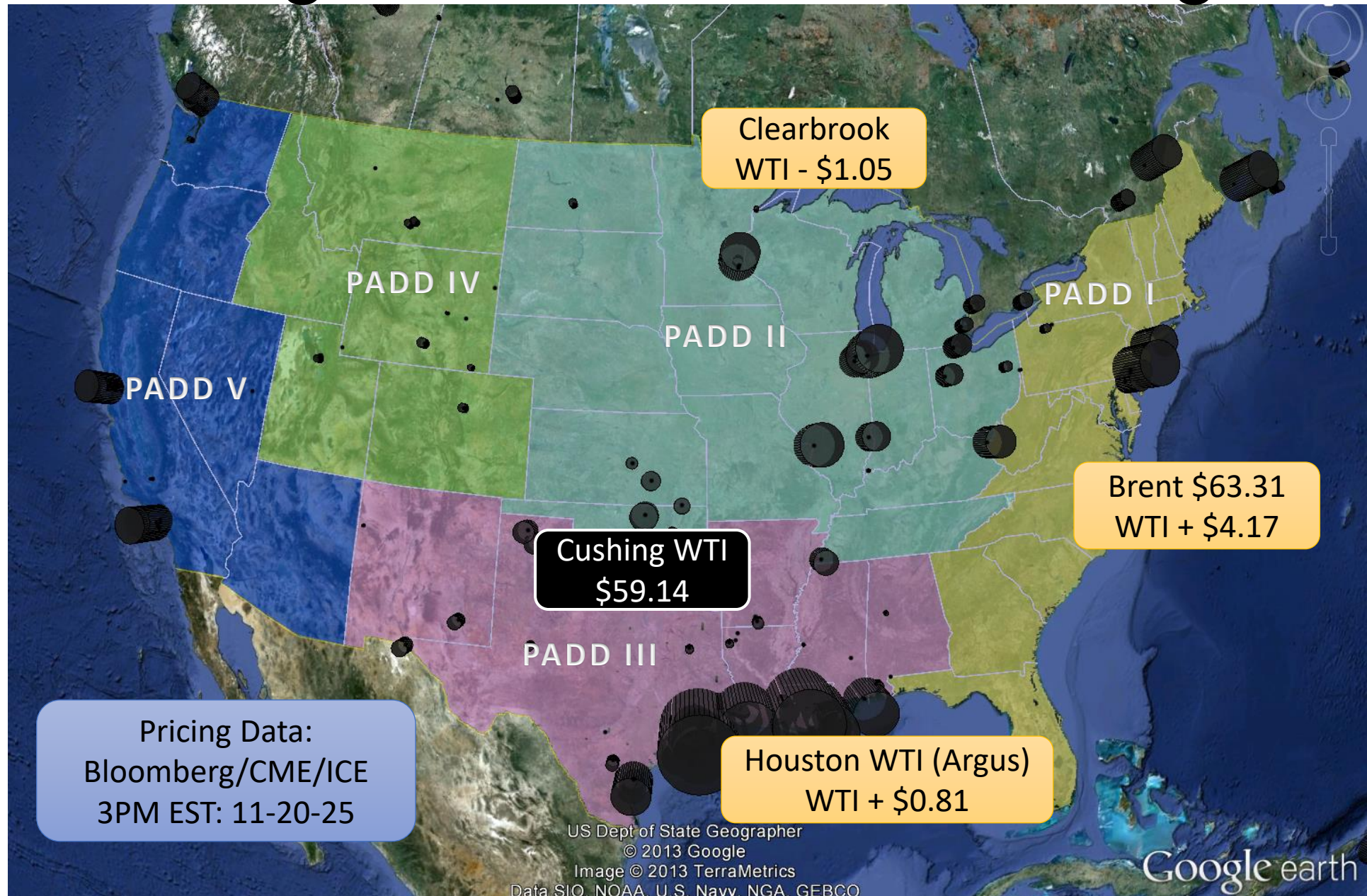
Rail Destinations Market Share (Aug. 2025)



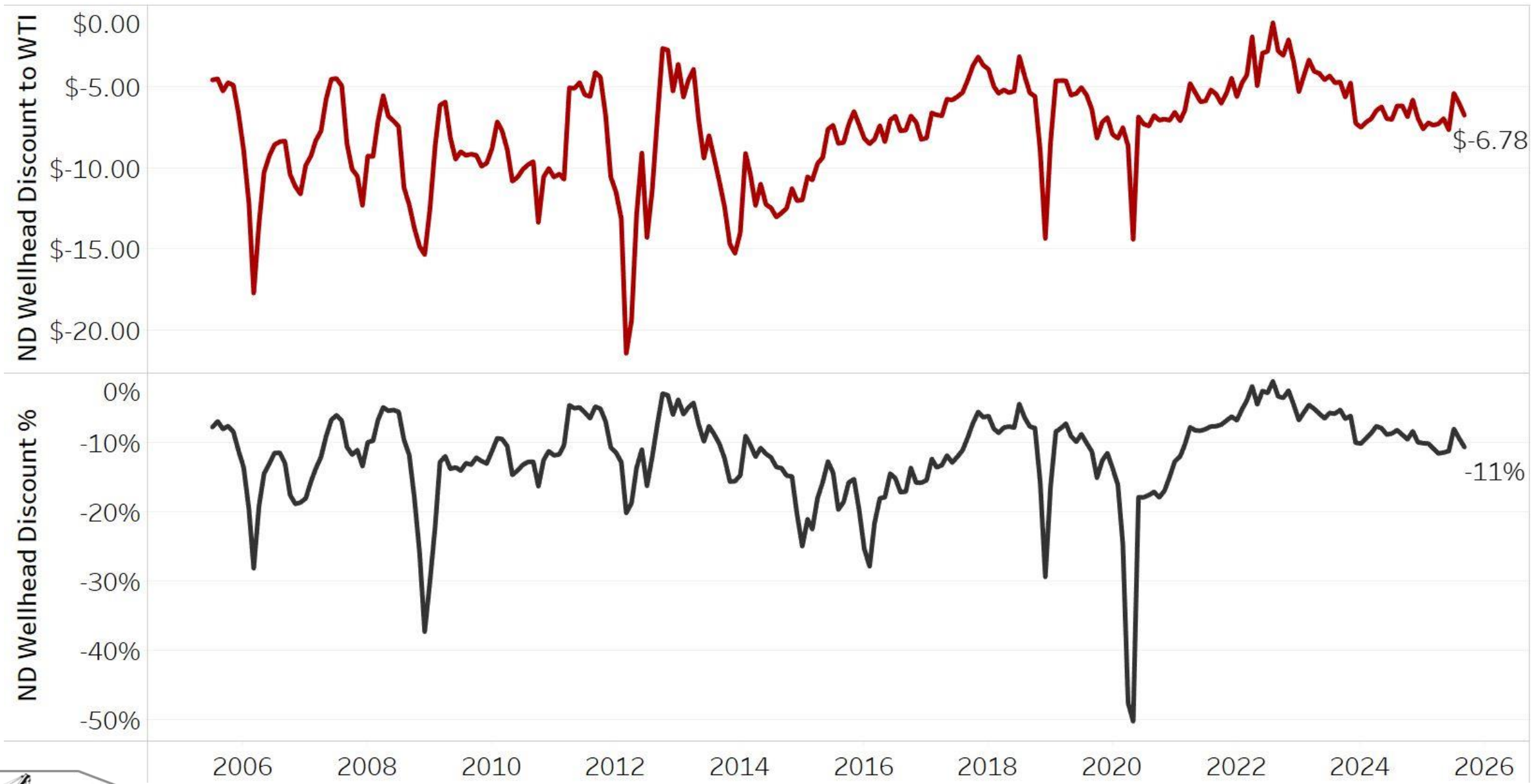
Major Rail Lines and Refineries



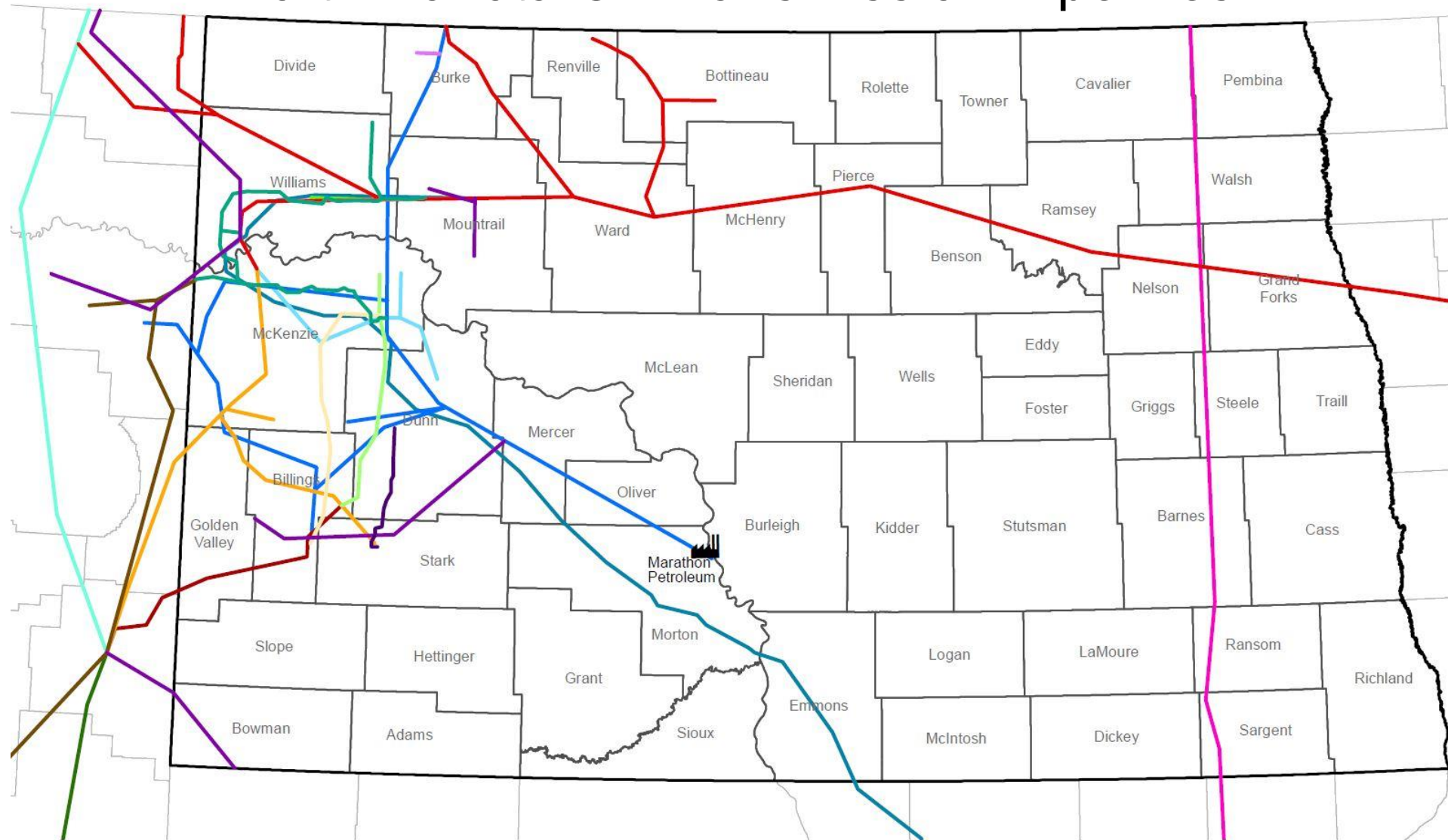
Major Pricing Benchmarks & Refining Centers



Average North Dakota Oil “Discount” to WTI



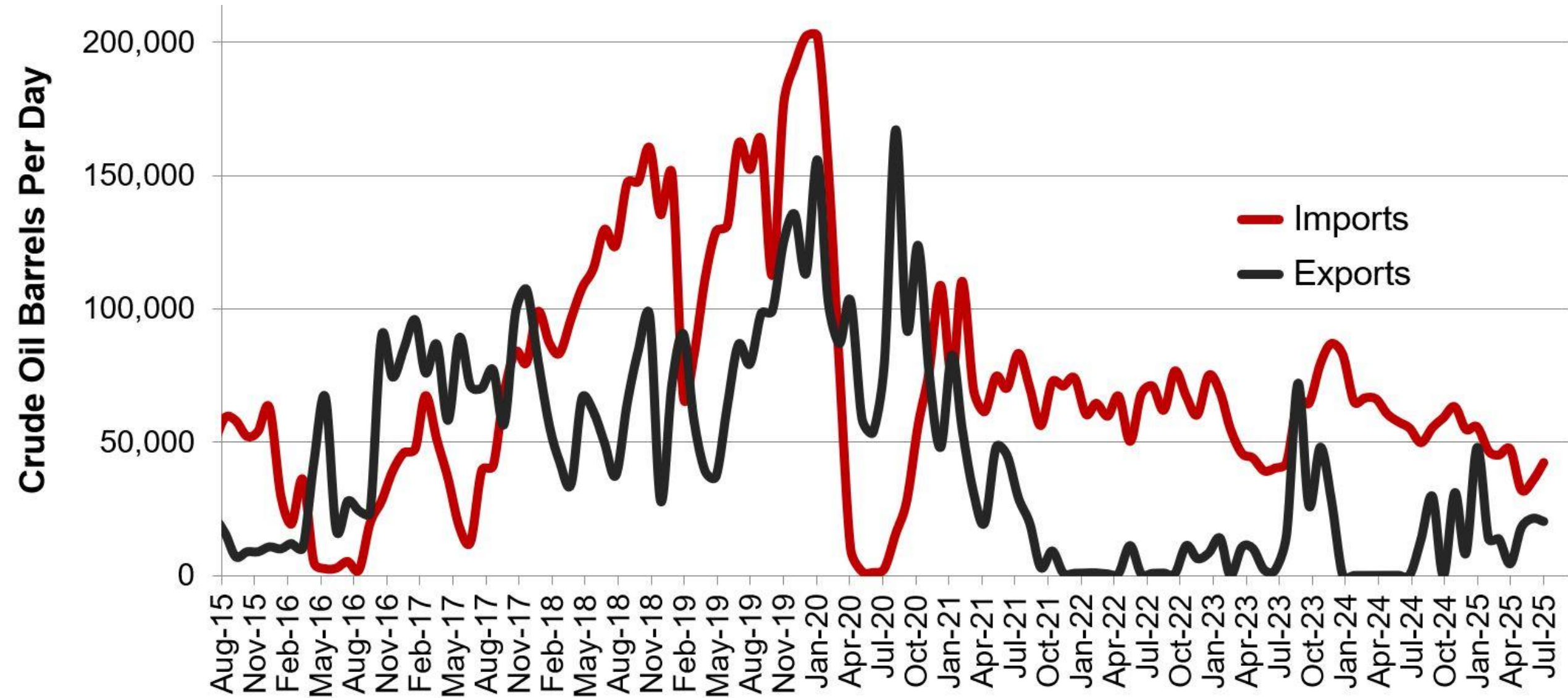
North Dakota Oil Transmission Pipelines



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



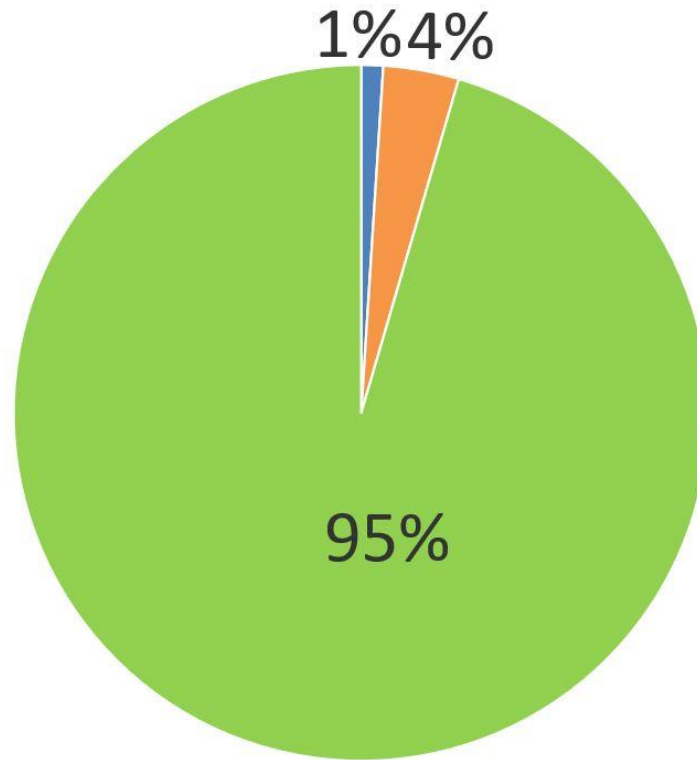
Williston Basin Truck/Rail Imports and Exports with Canada



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.

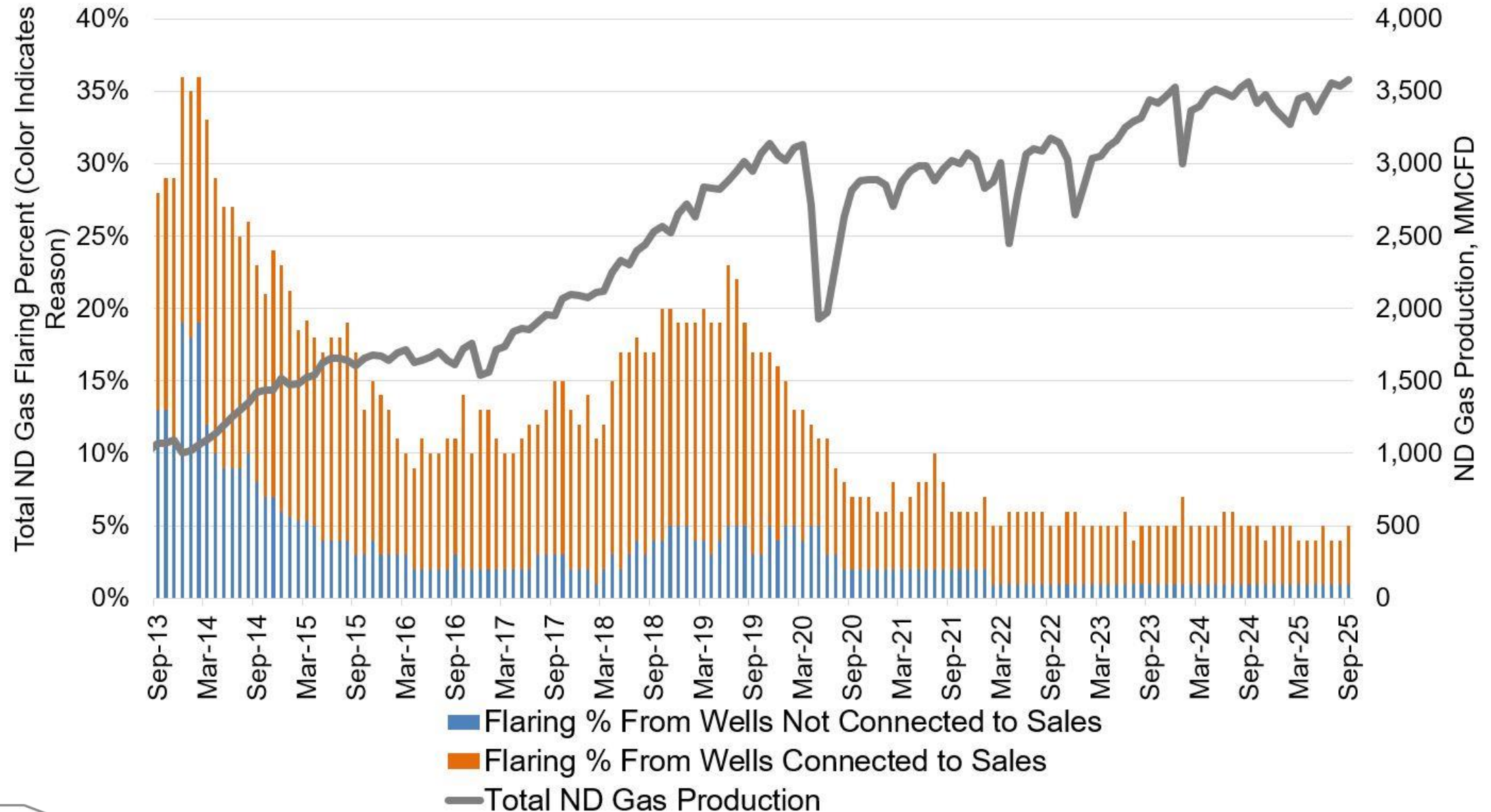
Simple Terms

Blue – Lack of pipelines
Orange – Challenges on existing infrastructure

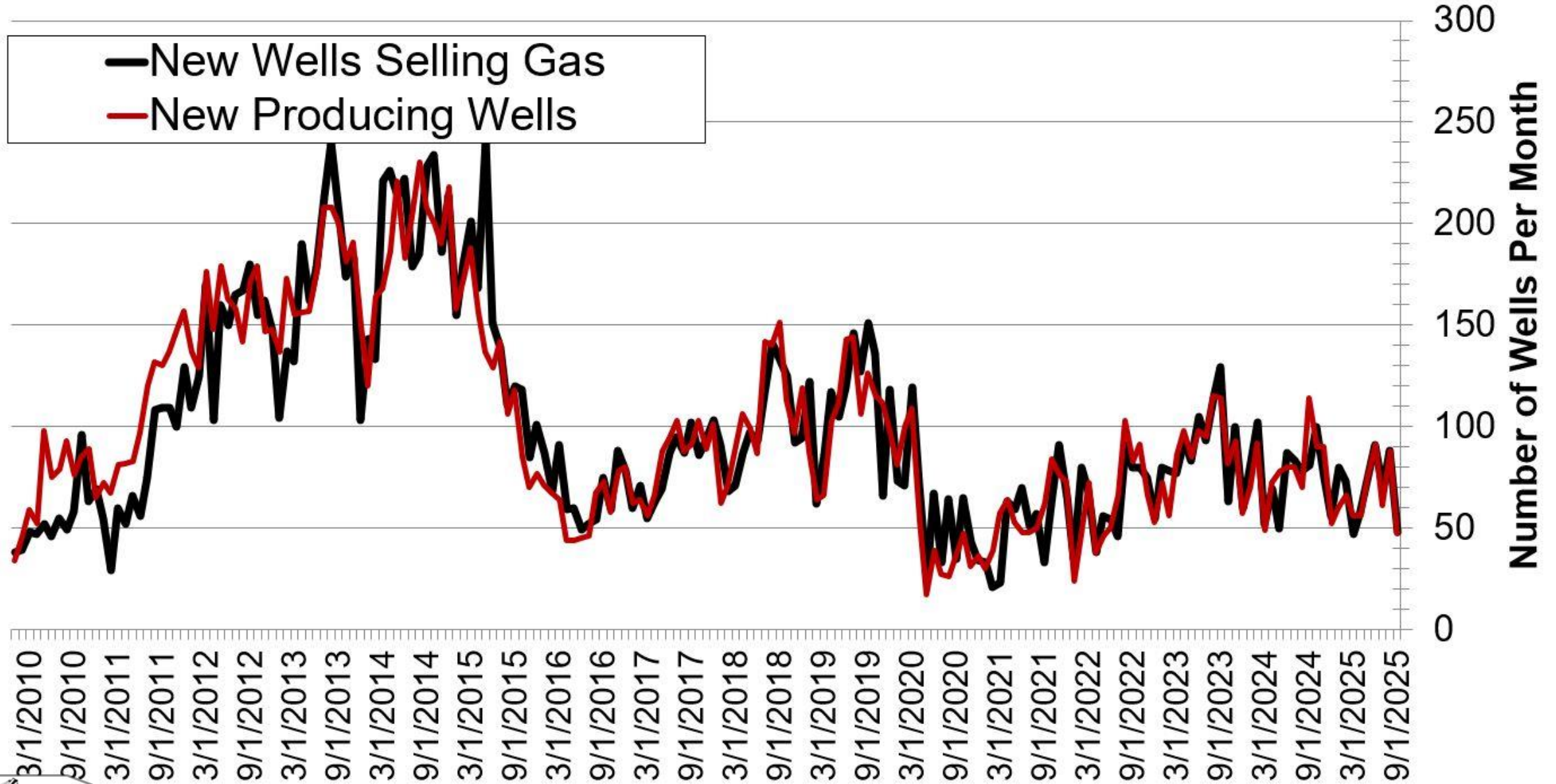
Sep. 2025 Data – Non-Confidential Wells



Solving the Flaring Challenge

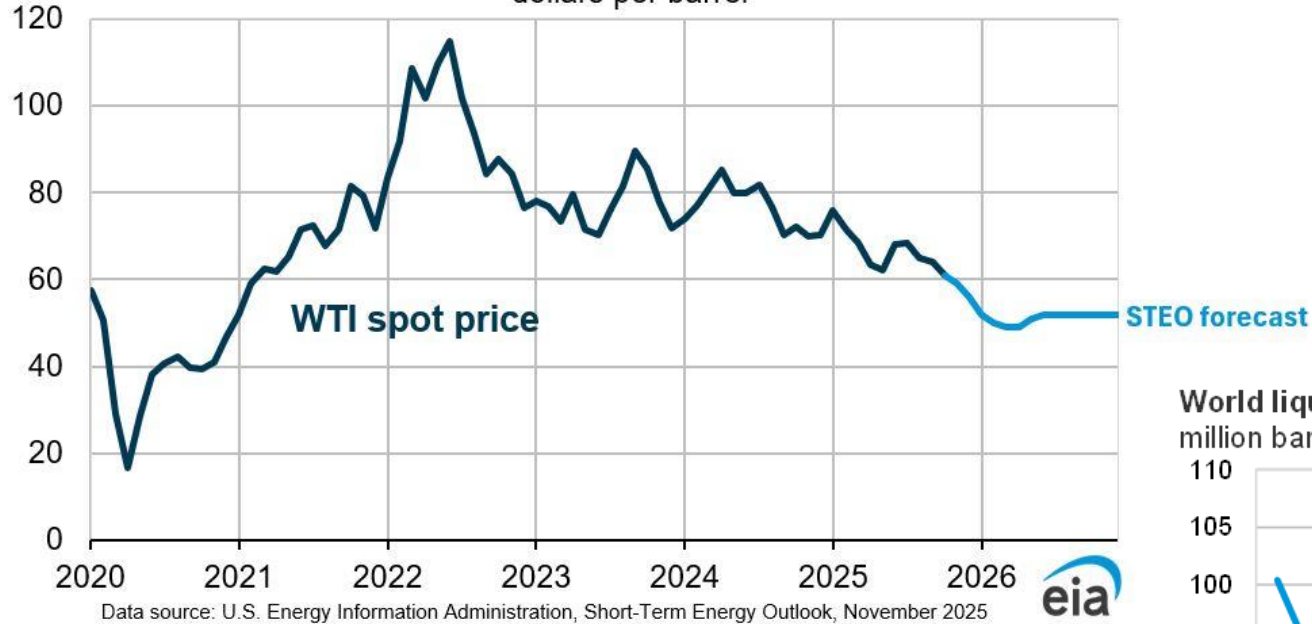


Solving the Flaring Challenge

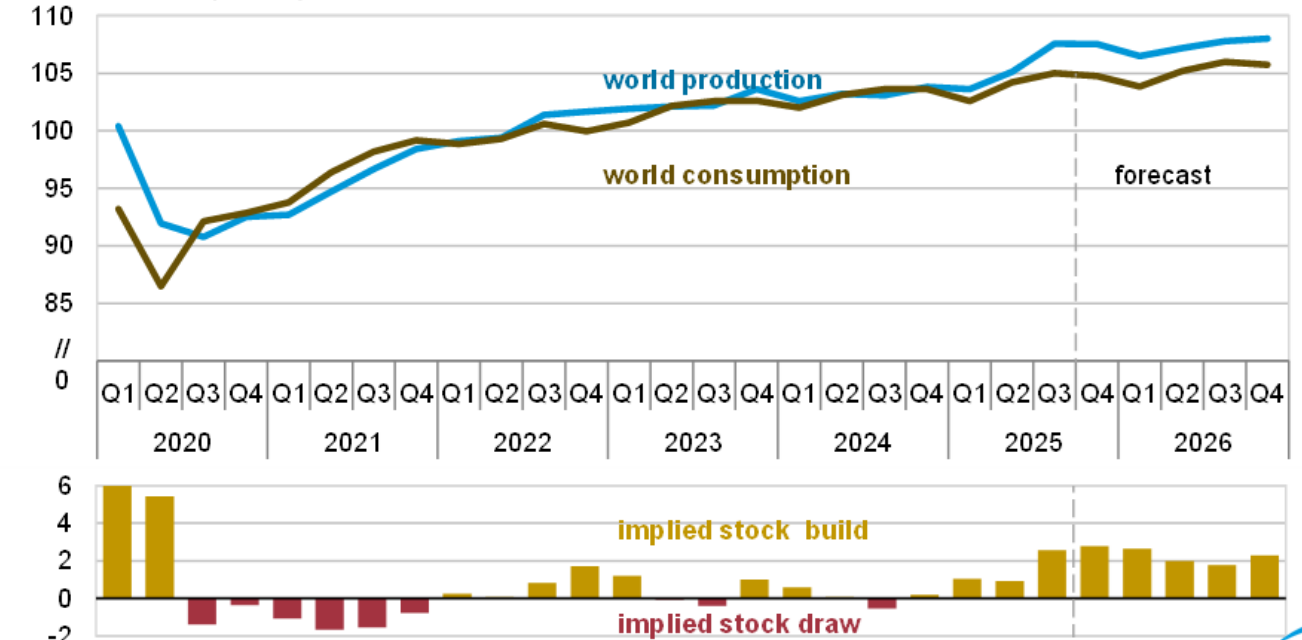


EIA Oil Price Outlook (November 2025)

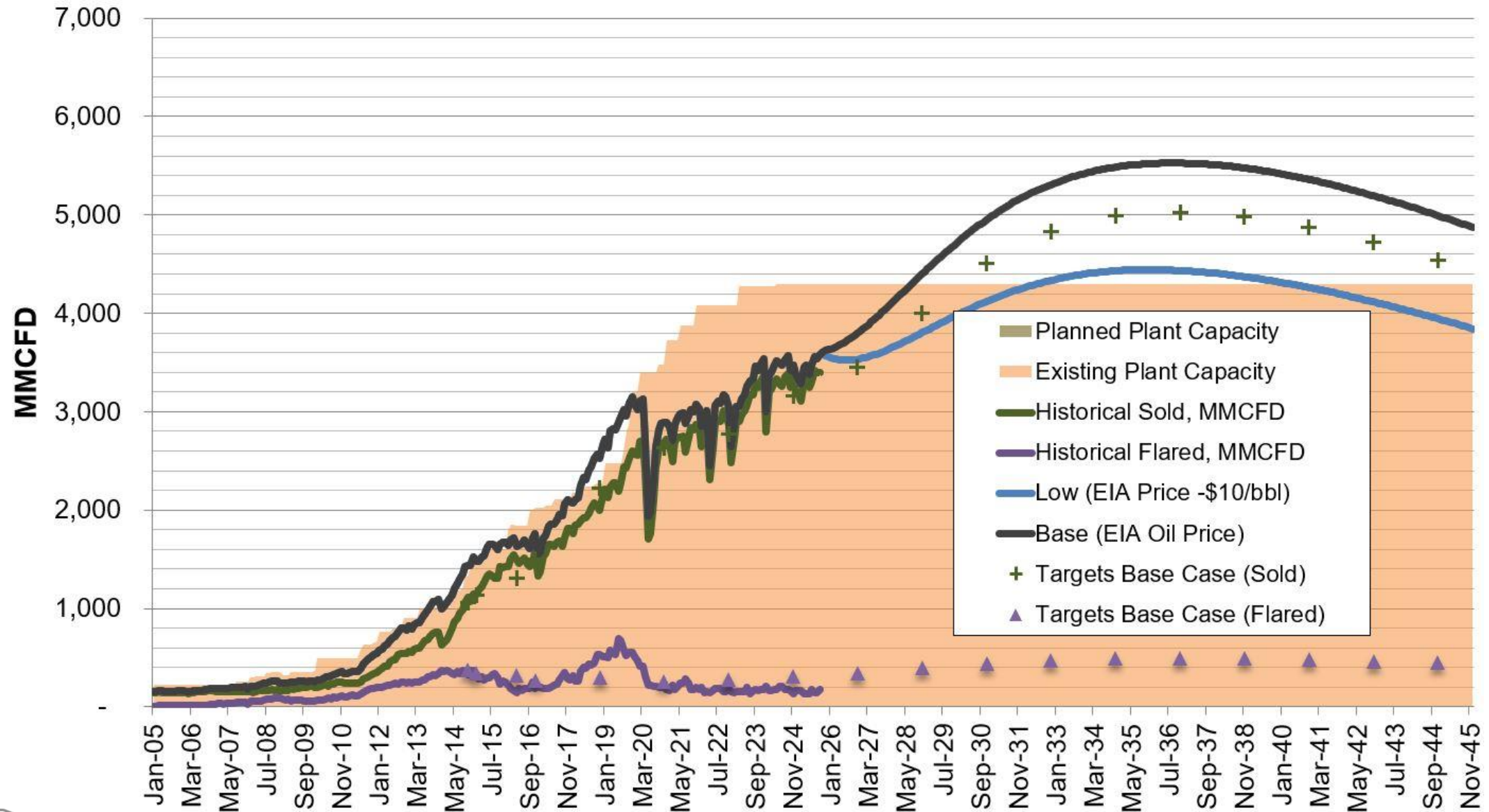
West Texas Intermediate (WTI) crude oil price
dollars per barrel



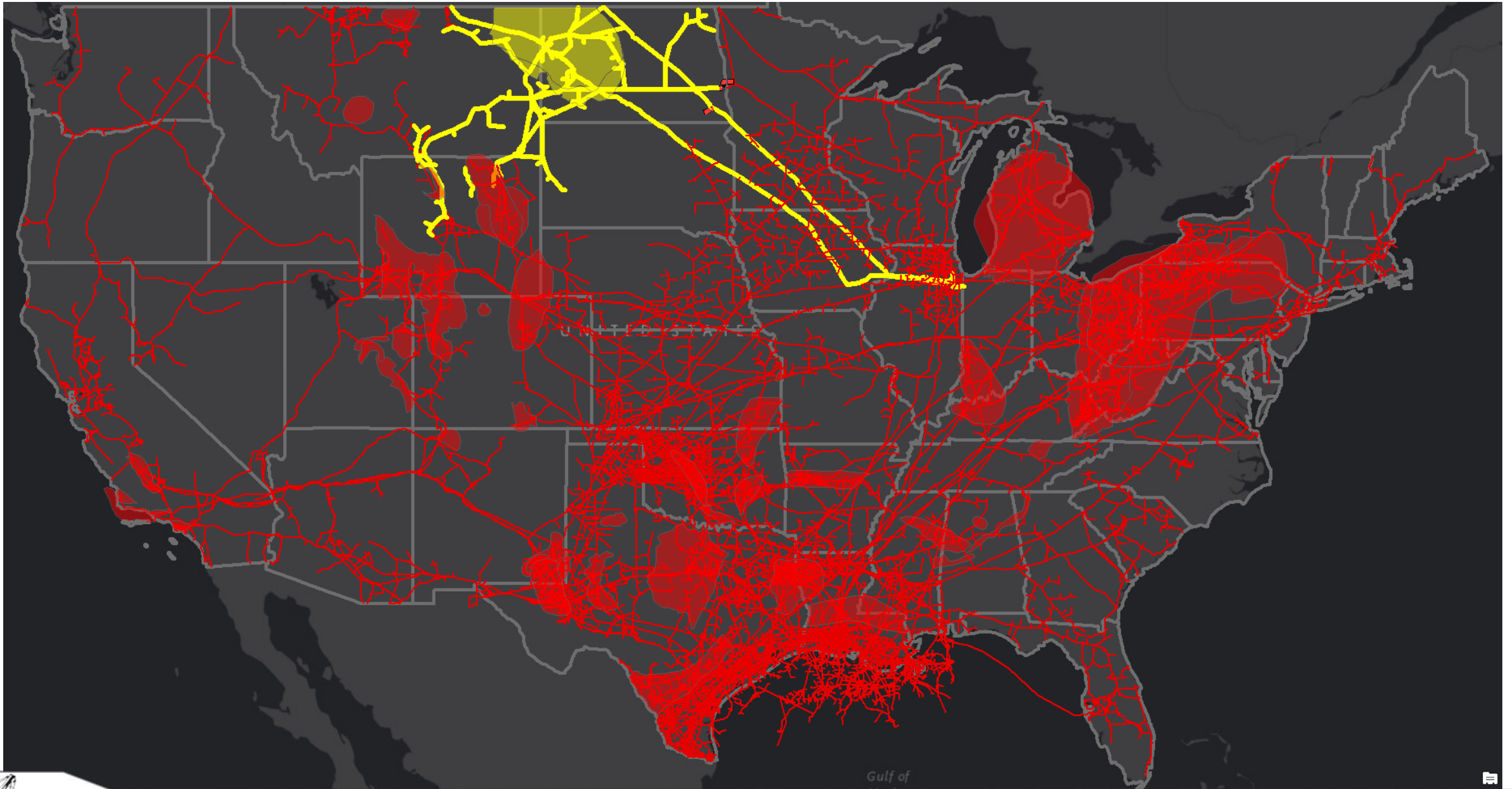
World liquid fuels production and consumption balance
million barrels per day



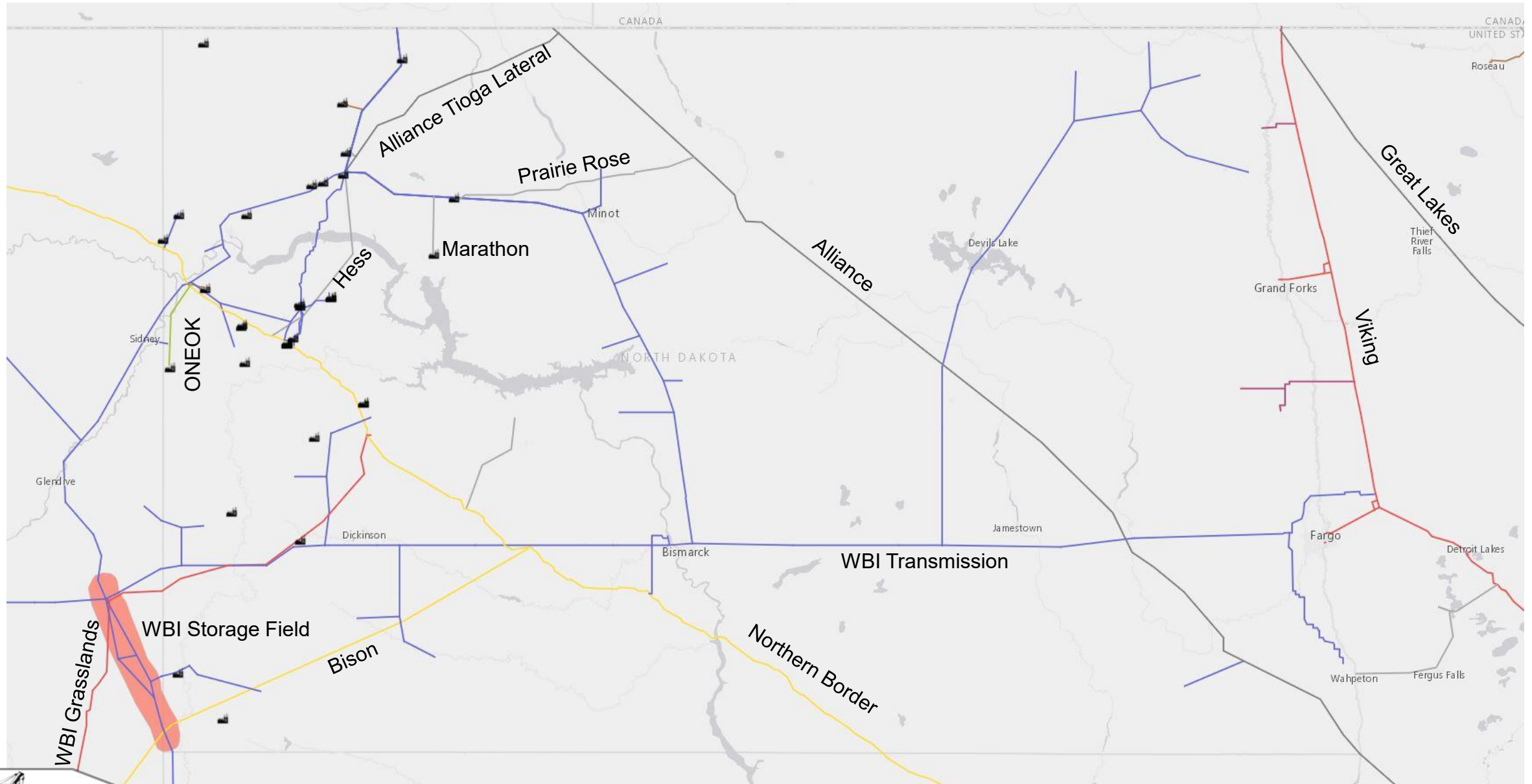
North Dakota Gas Processing Outlook



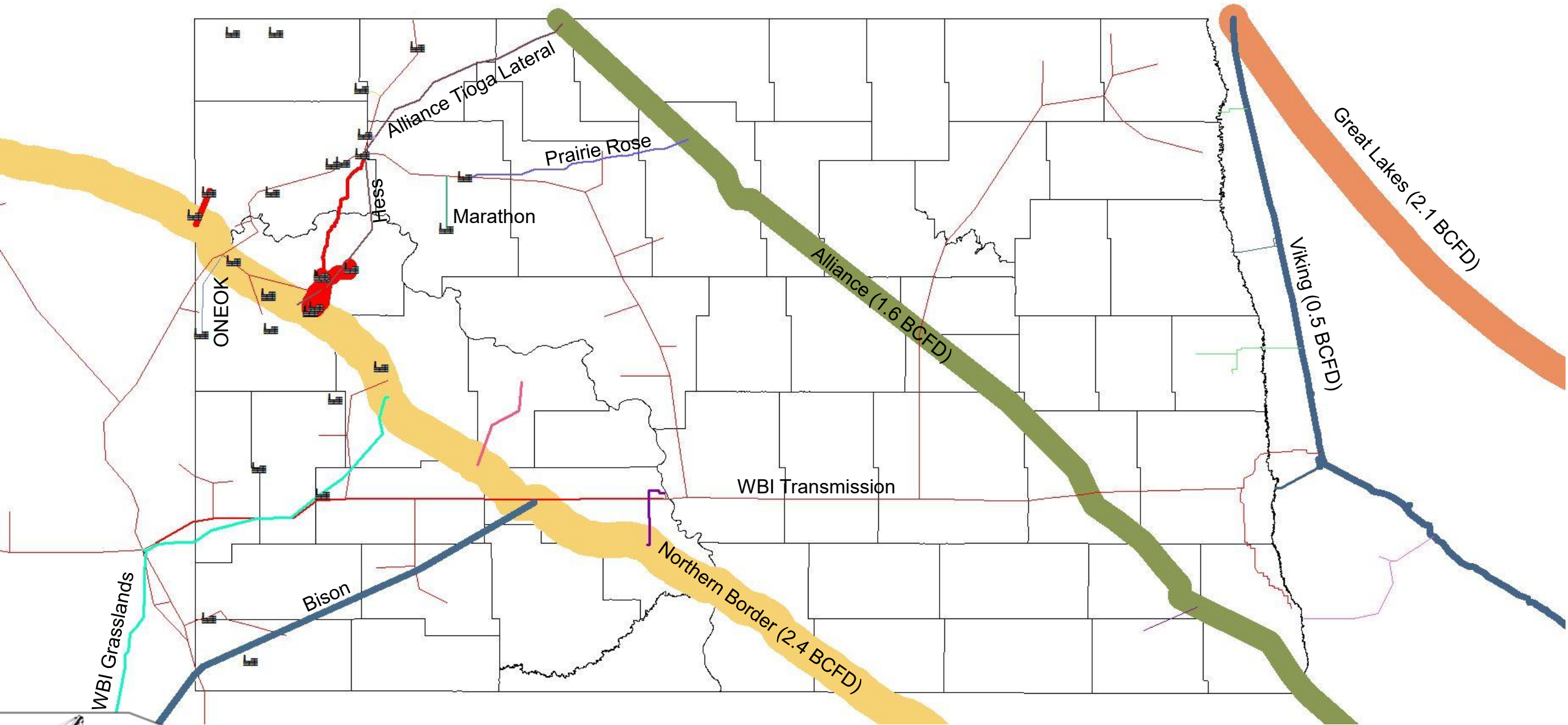
Bakken Natural Gas Infrastructure



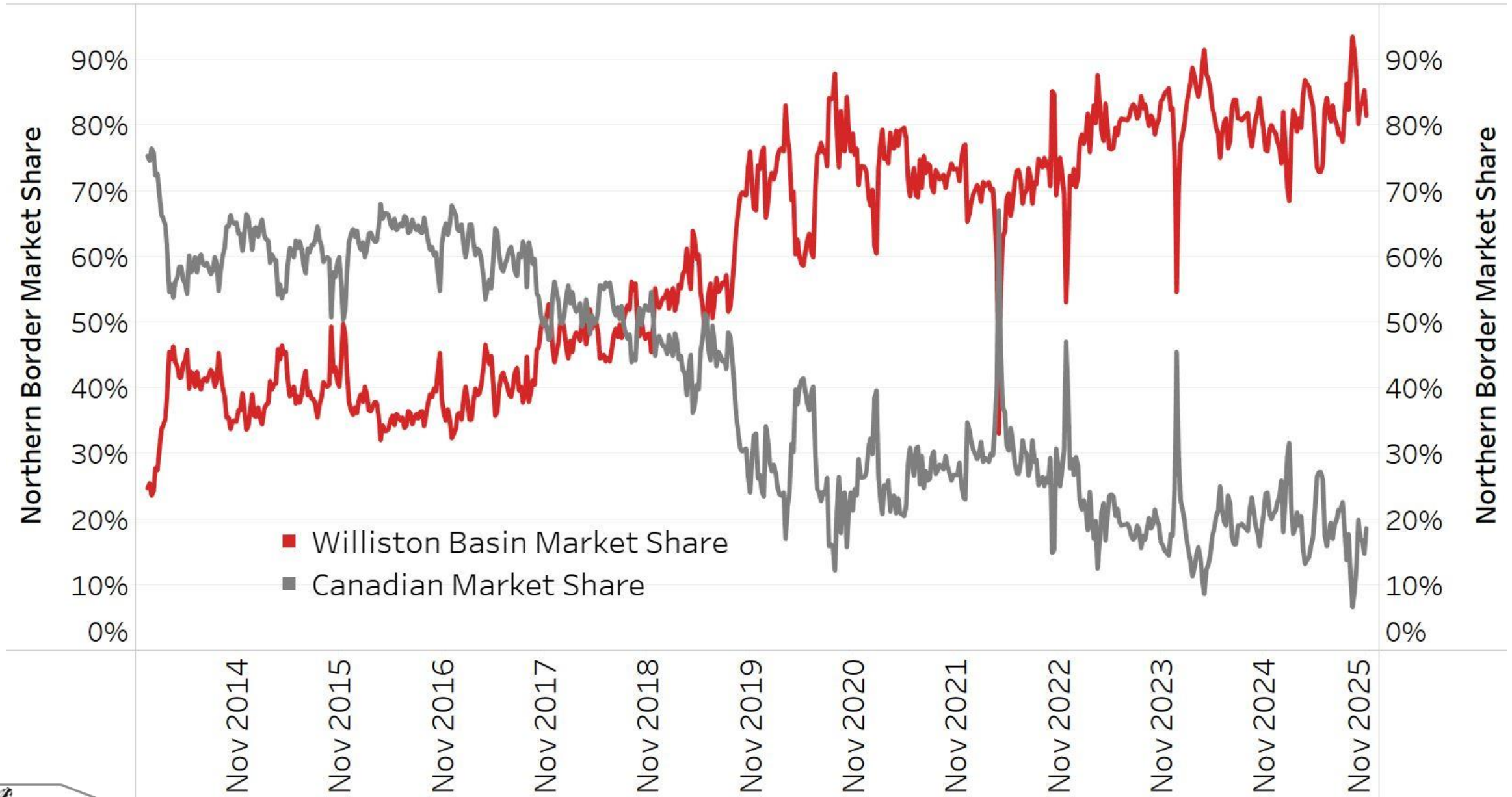
Major Residue Gas Pipeline Infrastructure



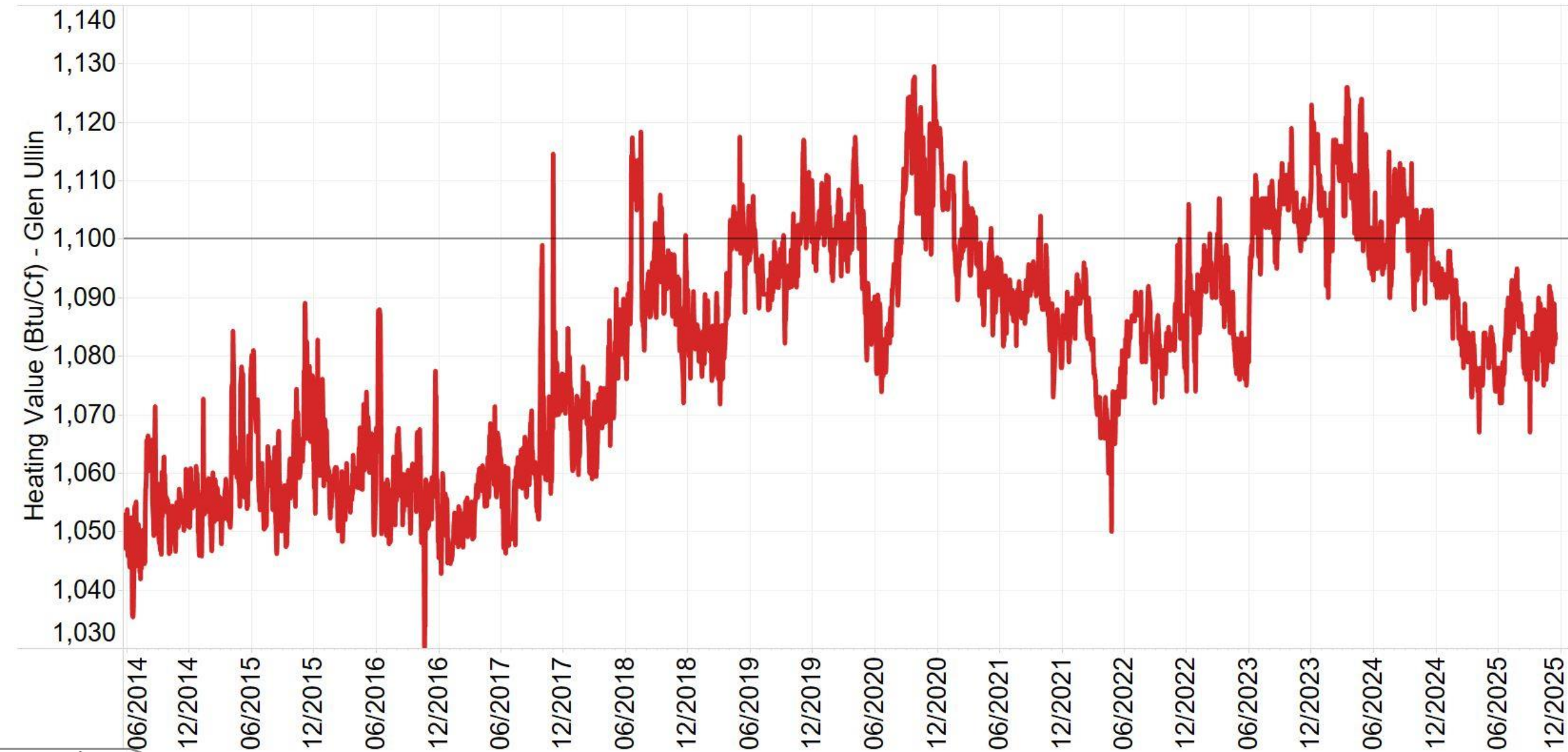
Residue Gas Pipeline Capacity Visualization



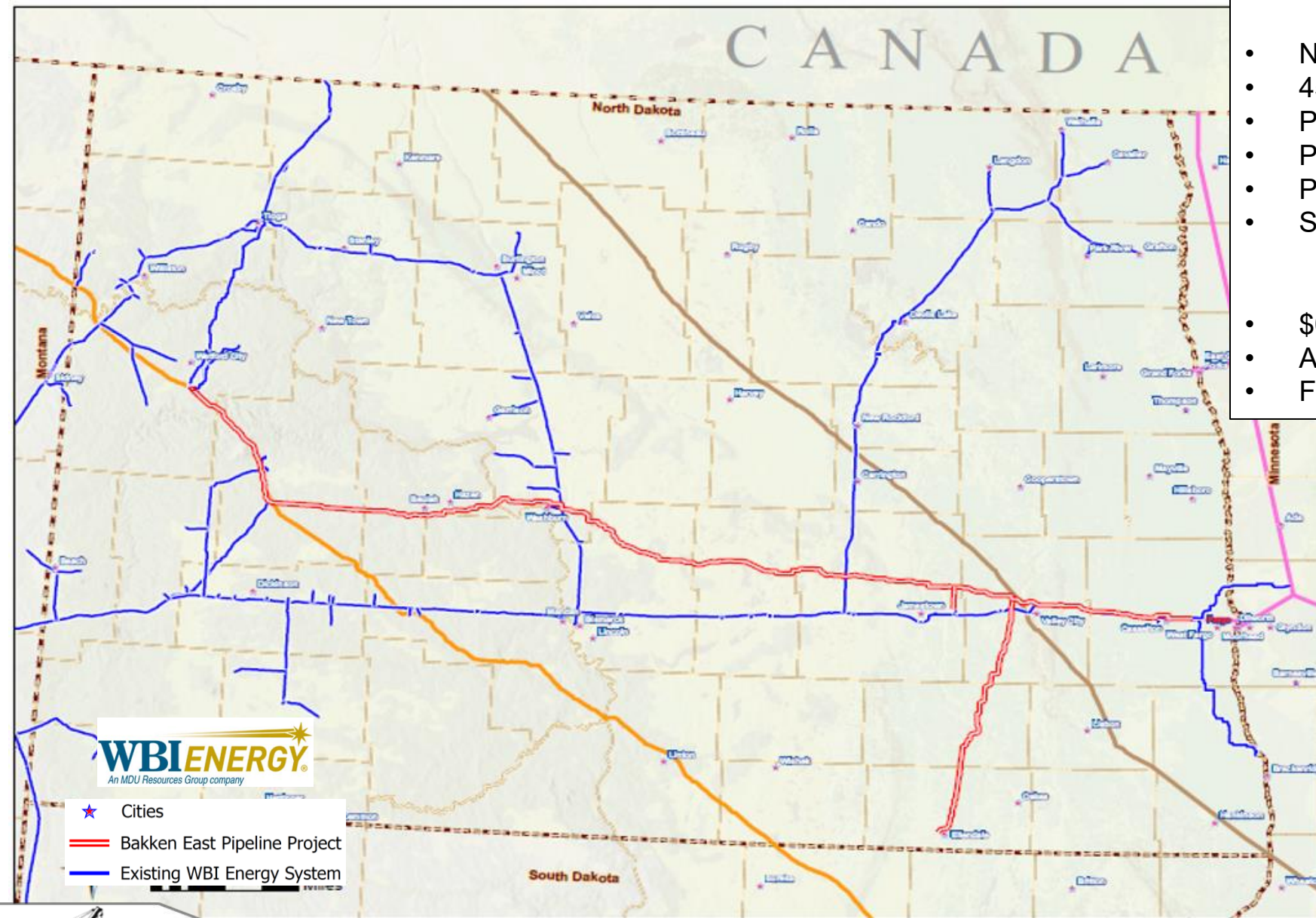
Northern Border Pipeline Market Share



Northern Border BTU at Glen Ullin, ND



WBI Energy: Proposed Bakken East Project



Natural Gas Pipeline Project Highlights

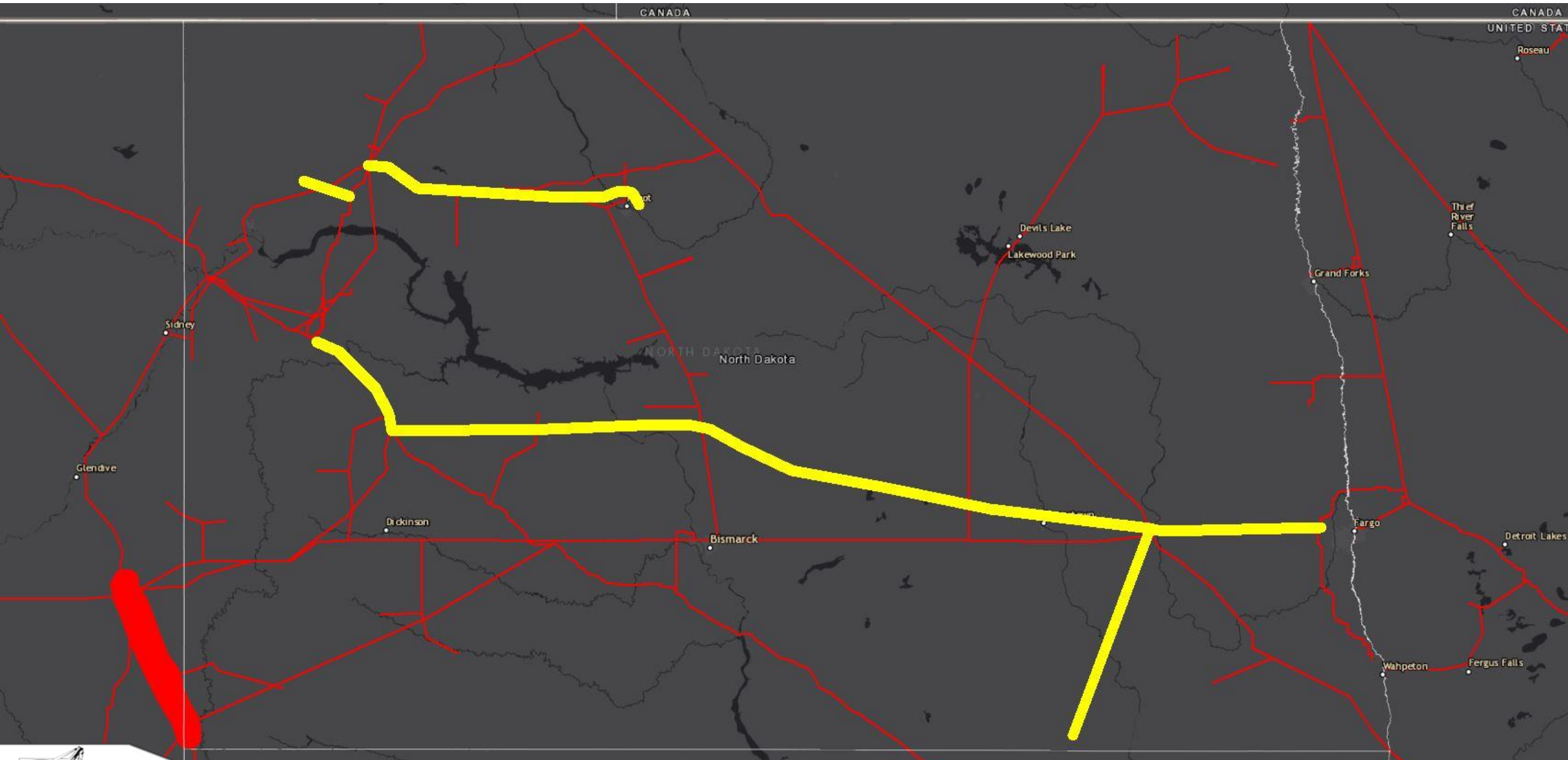
- Non-binding open season Dec 16 – Jan 31, 2025
- 455 Miles: 36", 30", & 20" Pipe
- Proposed Capacity (East) 1,000,000 Dth/Day
- Phase 1 (West) : Nov 2029 targeted in-service
- Phase 2 (East) : Nov 2030 targeted in-service
- Seeking commitments 20yrs or Longer

Estimated Rates

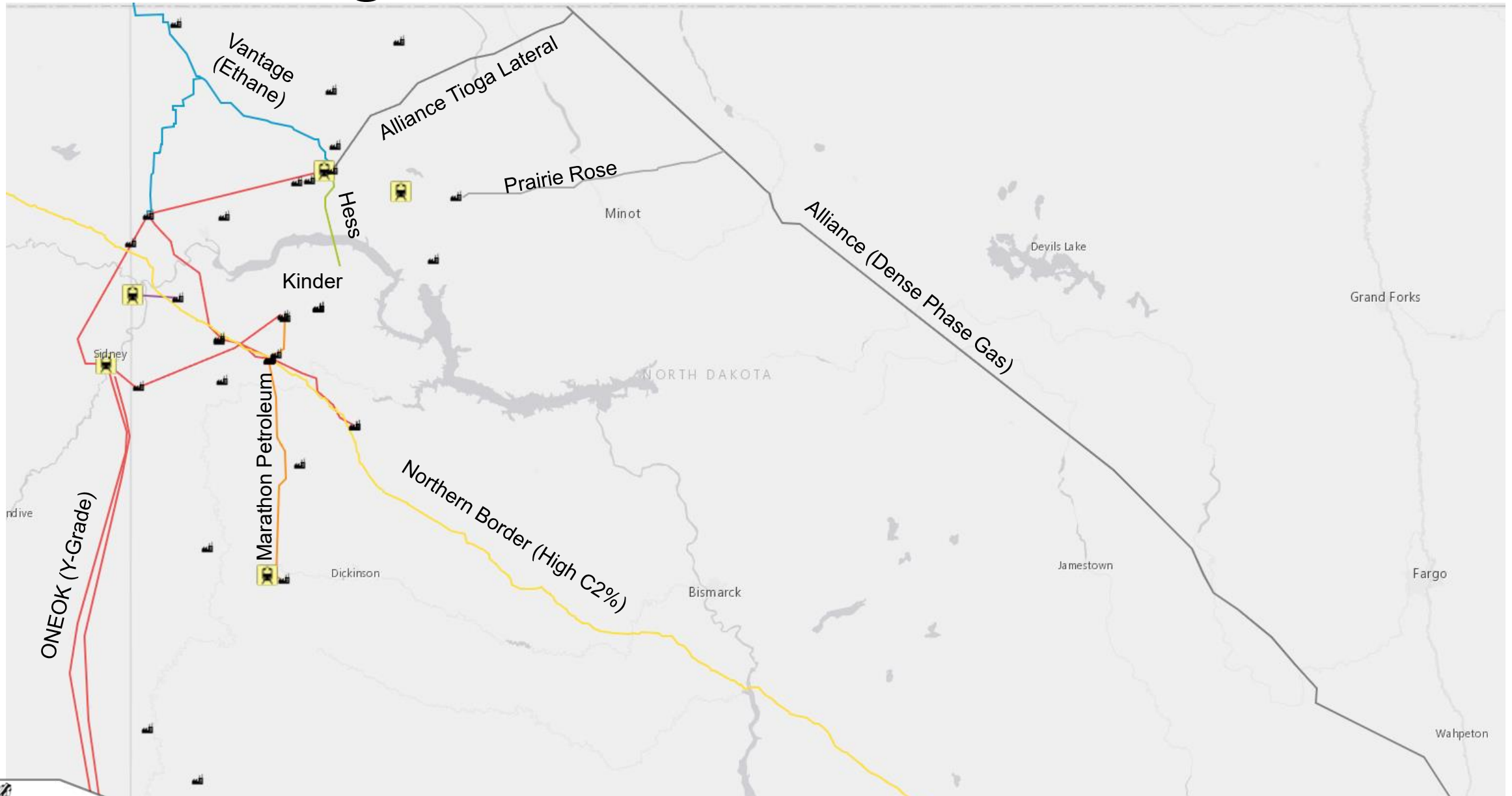
- \$0.85 to \$0.90/Dth + Fuel/Electric/Commodity
- Anchor Shipper Minimum: 100,000 Dth/Day
- Foundation Shipper Minimum: 250,000 Dth/Day



Beyond 2026: Gas Transmission Projects



Regional NGL Infrastructure



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