

# Pipeline Authority Monthly Update

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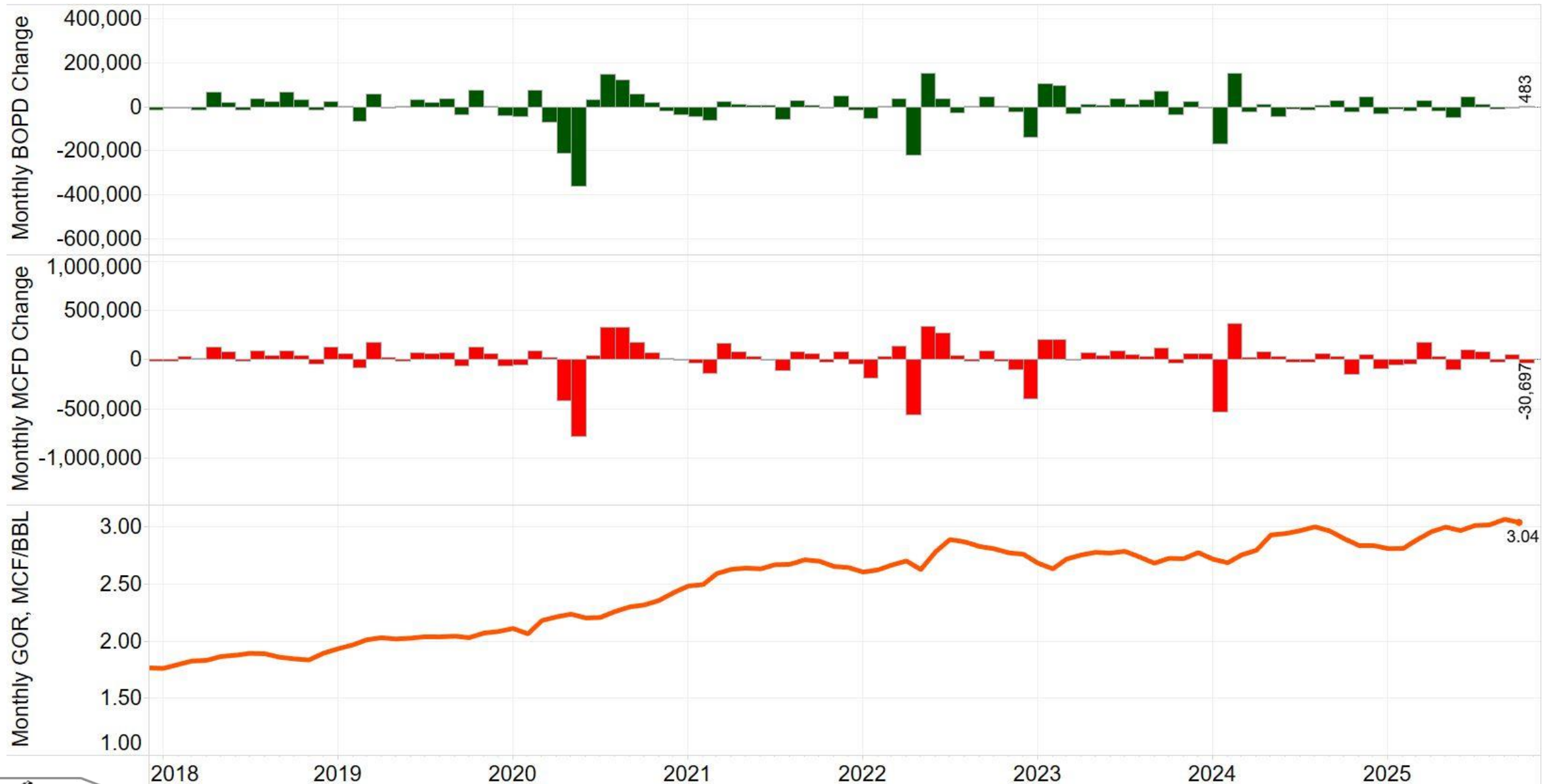
**December 19, 2025**

# US Williston Basin Oil Production - 2025

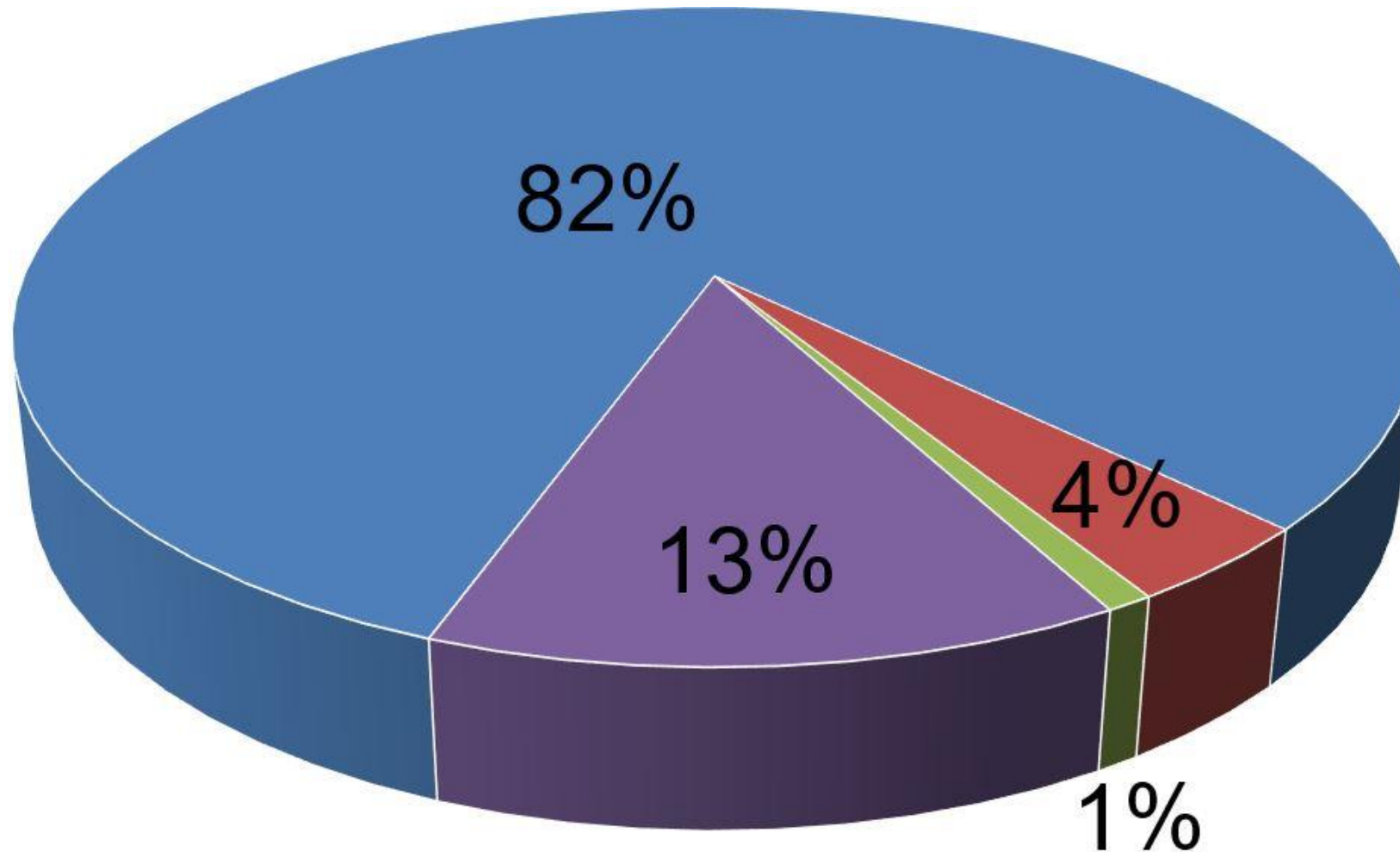
MONTH	ND	Eastern MT*	SD	TOTAL
January	1,182,099	75,046	2,281	1,259,426
February	1,164,904	71,717	2,282	1,238,903
March	1,194,699	76,008	2,272	1,272,979
April	1,175,671	74,886	2,294	1,252,851
May	1,126,252	79,633	2,295	1,208,180
June	1,171,906	79,689	2,145	1,253,740
July	1,181,133	80,405	2,271	1,263,809
August	1,170,901	76,362	2,218	1,249,481
September	1,167,656	78,928	2,253	1,248,837
October	1,168,139	80,313		
November				
December				



# North Dakota Monthly Production Change



# Estimated Williston Basin Oil Transportation



■ Pipeline Export

■ Truck/Rail to Canada

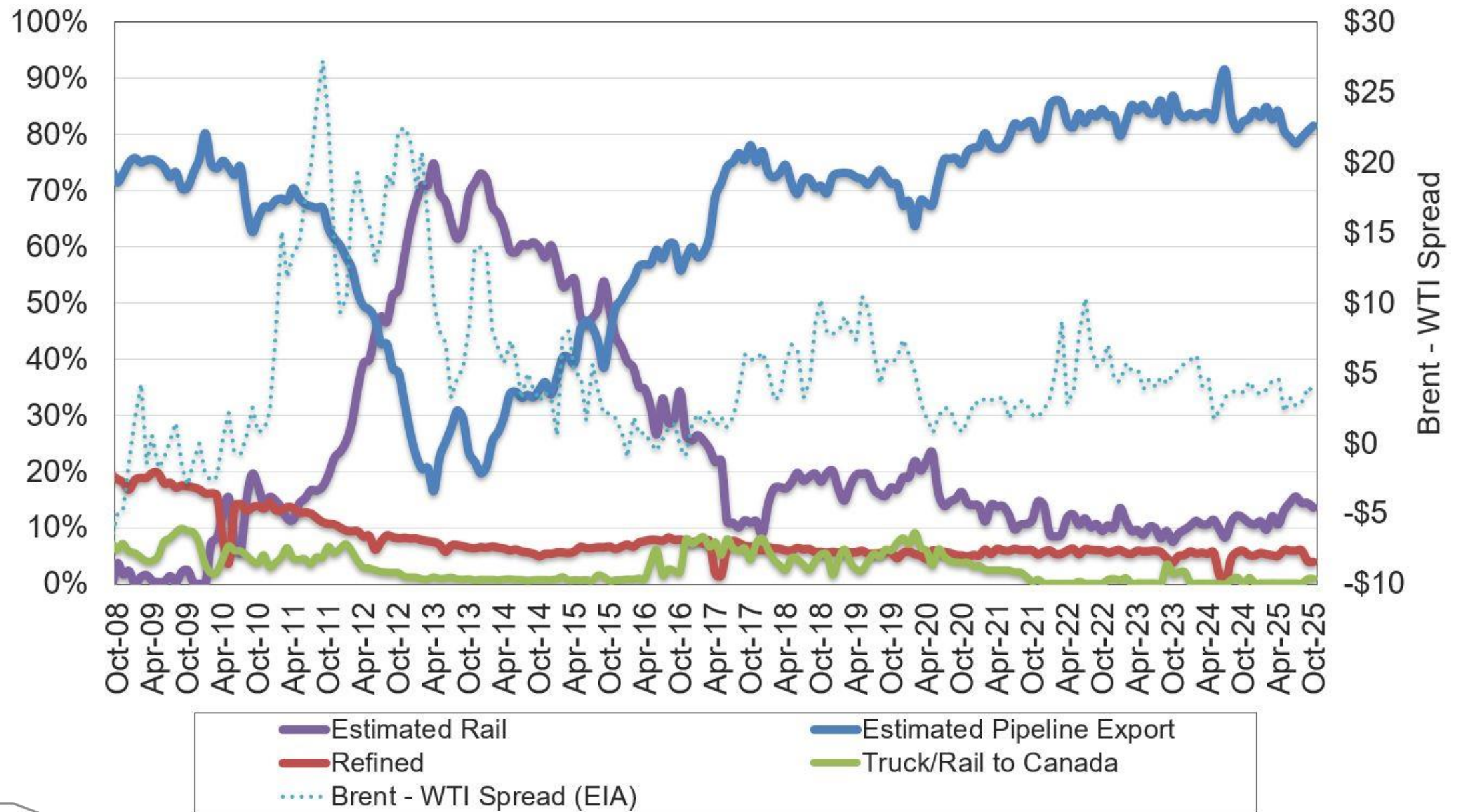
■ Refined

■ Estimated Rail





# Estimated Williston Basin Oil Transportation

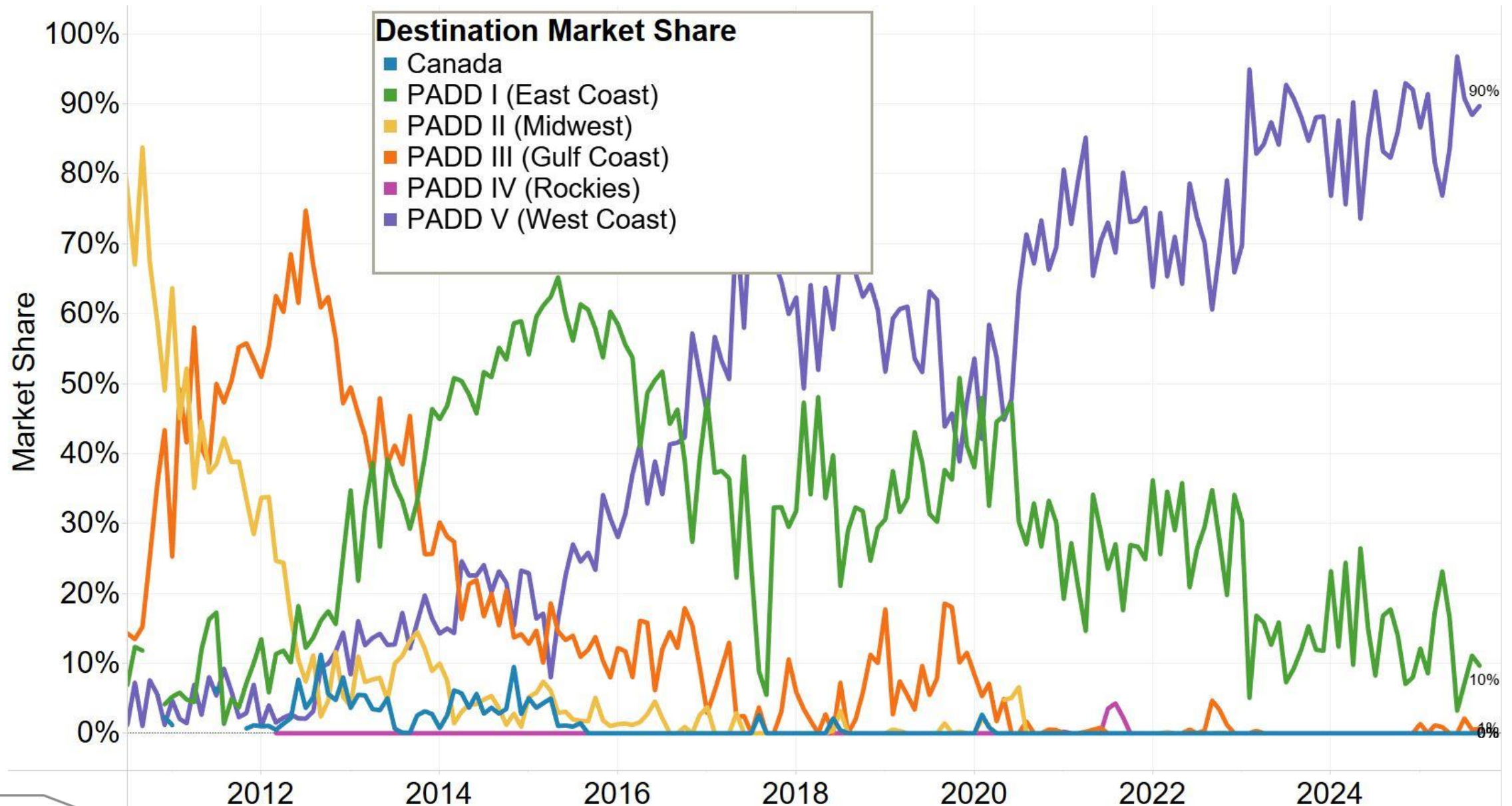


# Estimated ND Rail Export Volumes



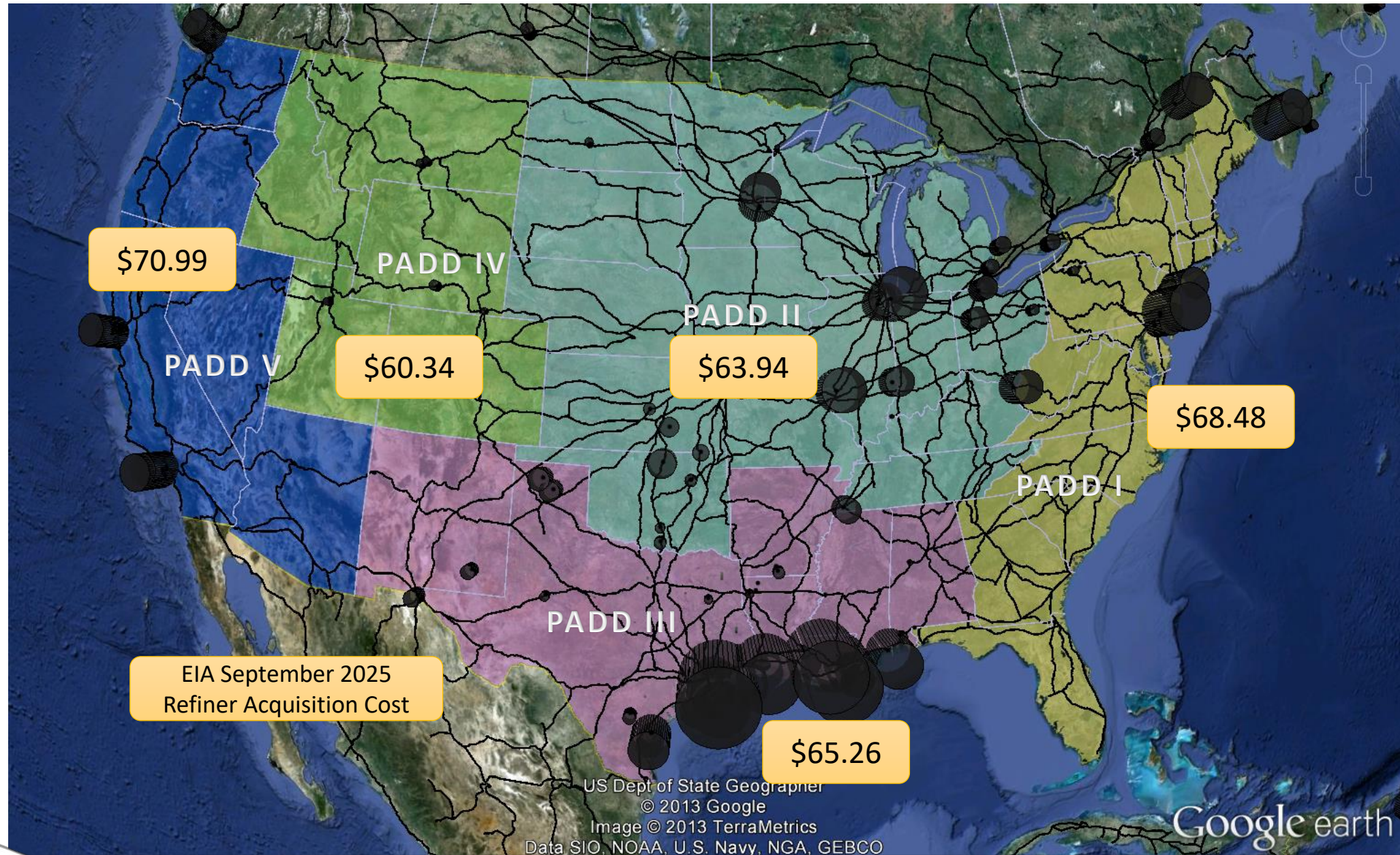


# Rail Destinations Market Share (Sep. 2025)



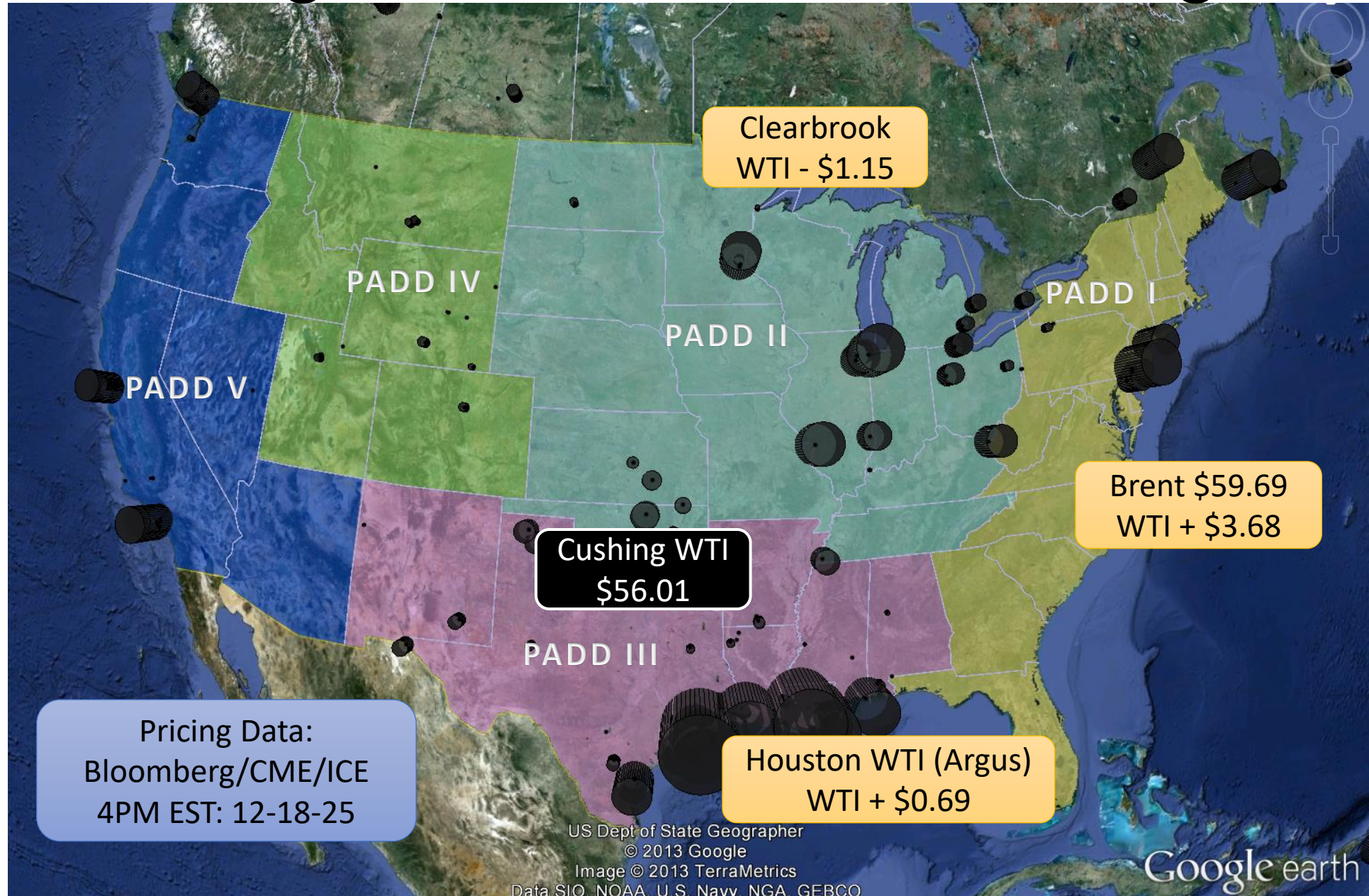


# Major Rail Lines and Refineries

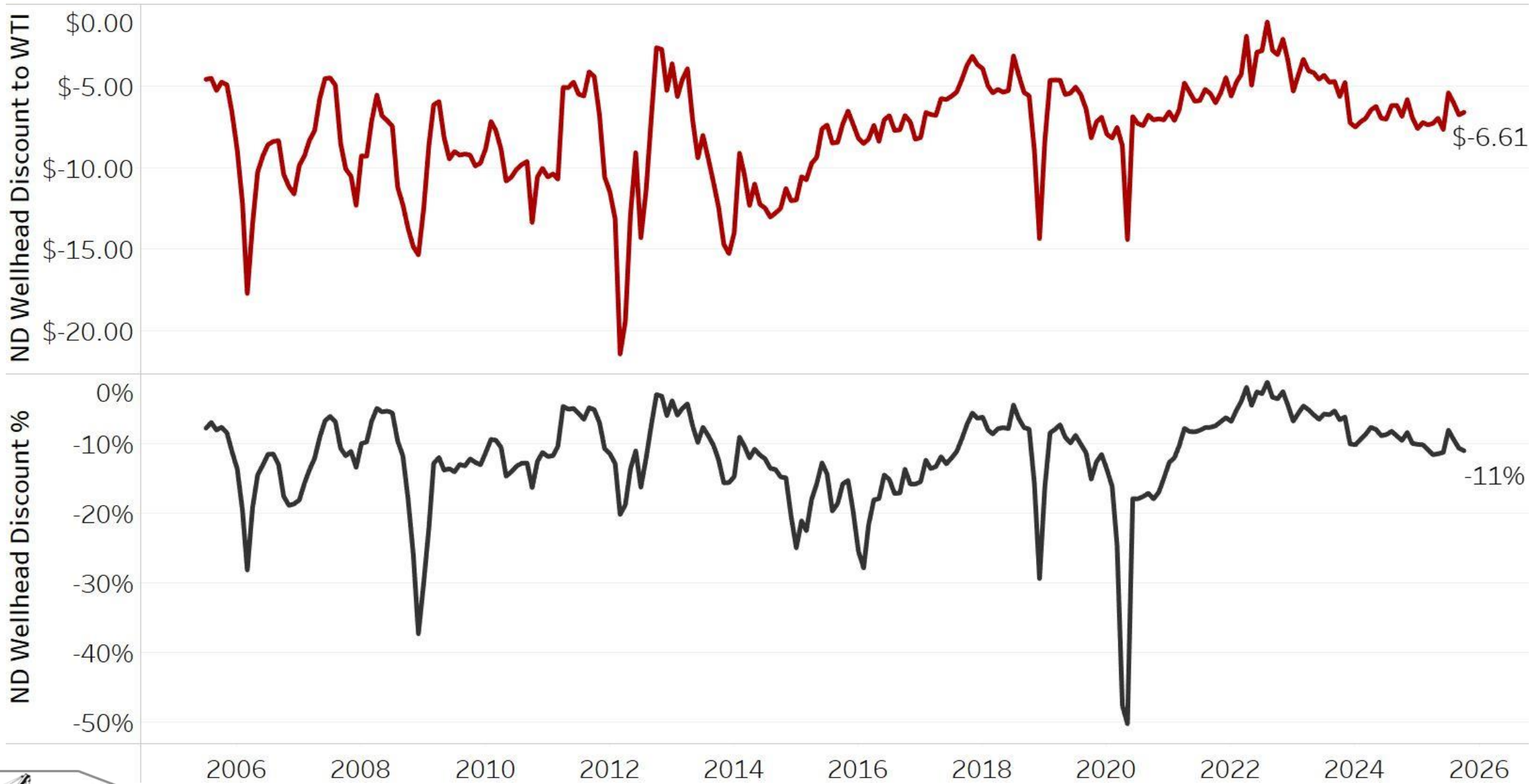




# Major Pricing Benchmarks & Refining Centers

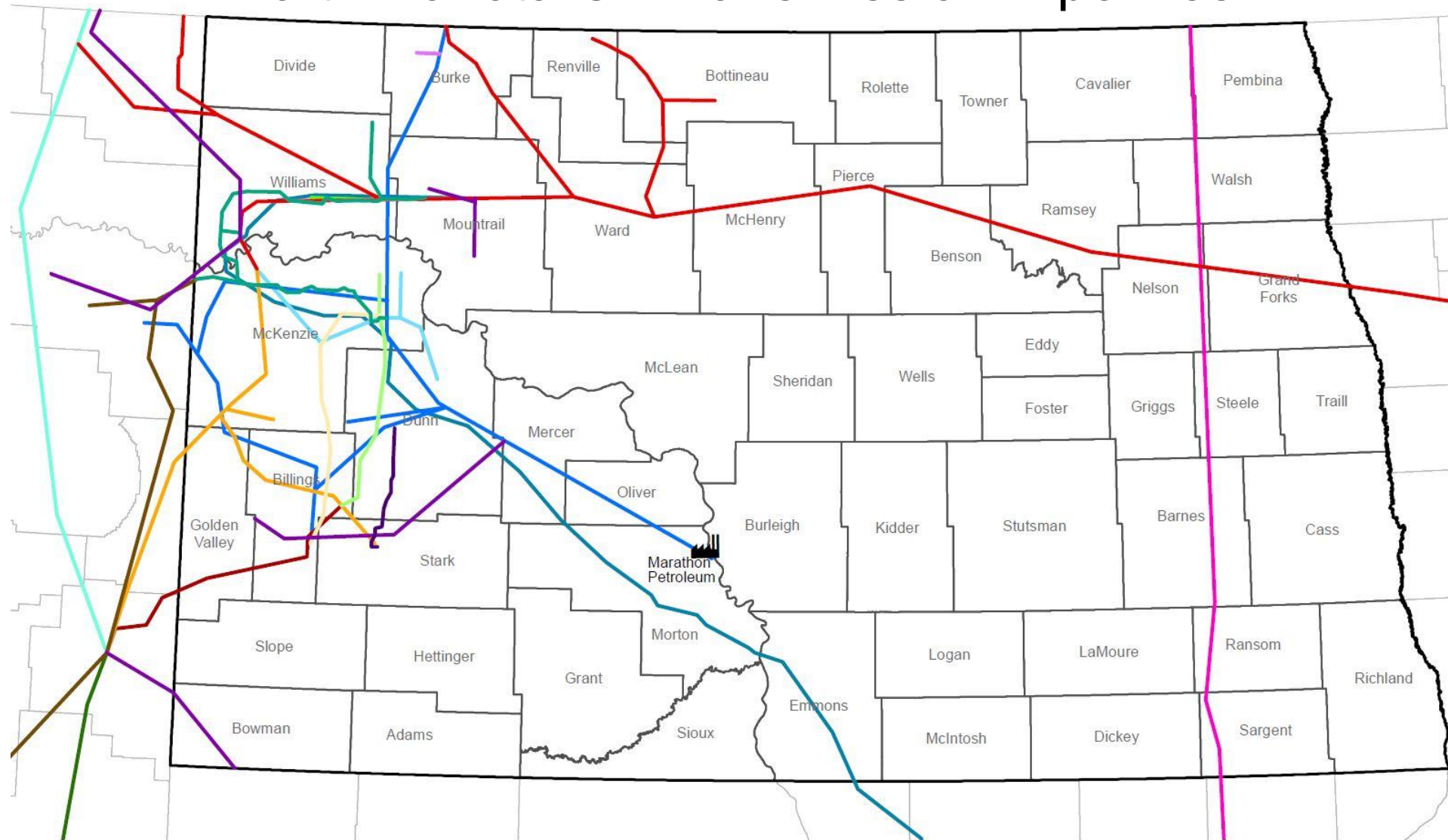


# Average North Dakota Oil “Discount” to WTI





# North Dakota Oil Transmission Pipelines

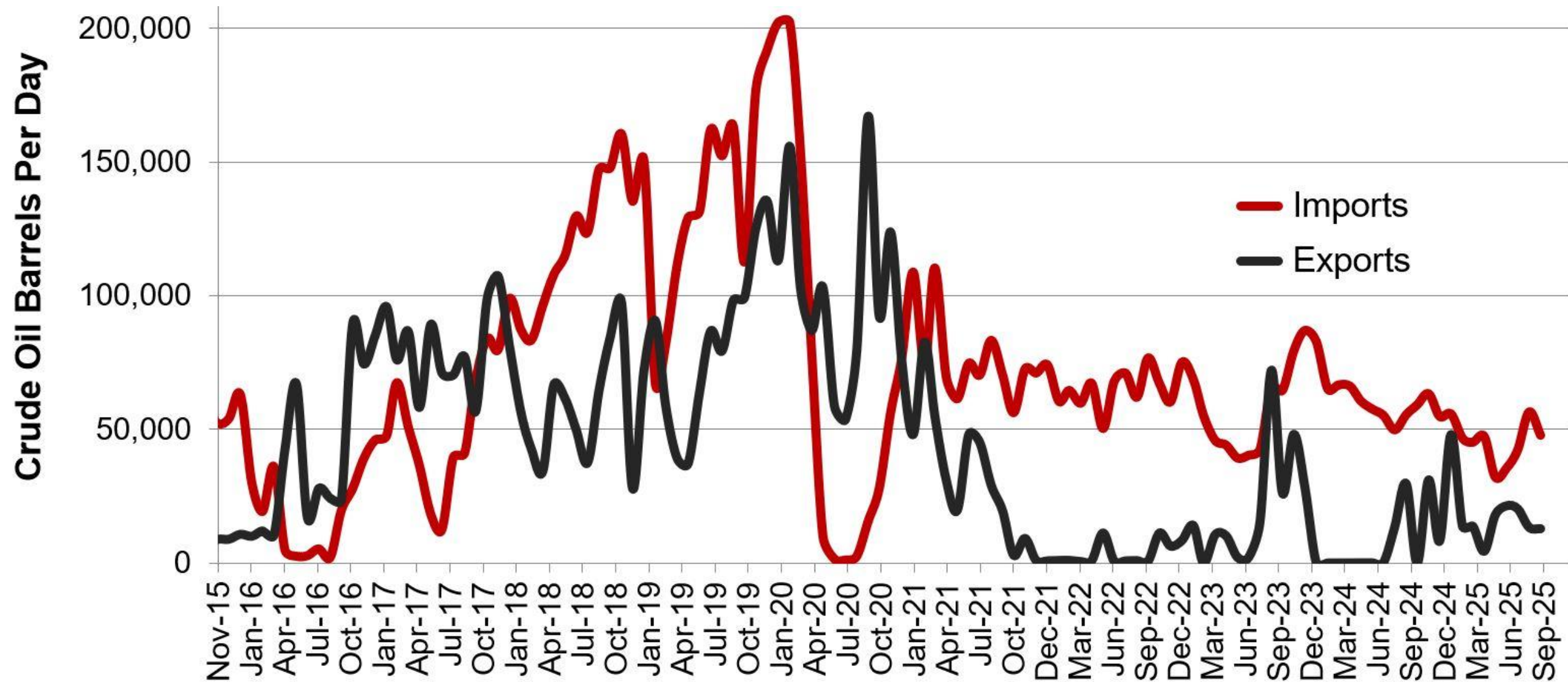


- |                    |                 |               |            |                   |          |
|--------------------|-----------------|---------------|------------|-------------------|----------|
| Refinery           | Basin Transload | Butte         | Double H   | Hiland            | Bridger  |
| Bakken Oil Express | Belle Fourche   | Crestwood     | Enbridge   | Keystone Pipeline | Targa    |
| BakkenLink         | Bridger         | Dakota Access | Four Bears | Little Missouri   | Marathon |





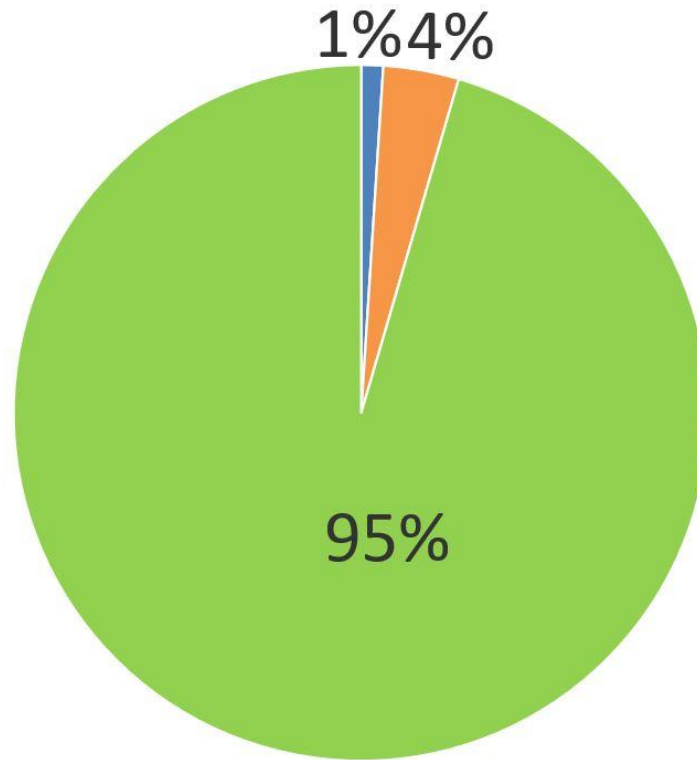
# Williston Basin Imports and Exports with Canada



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.

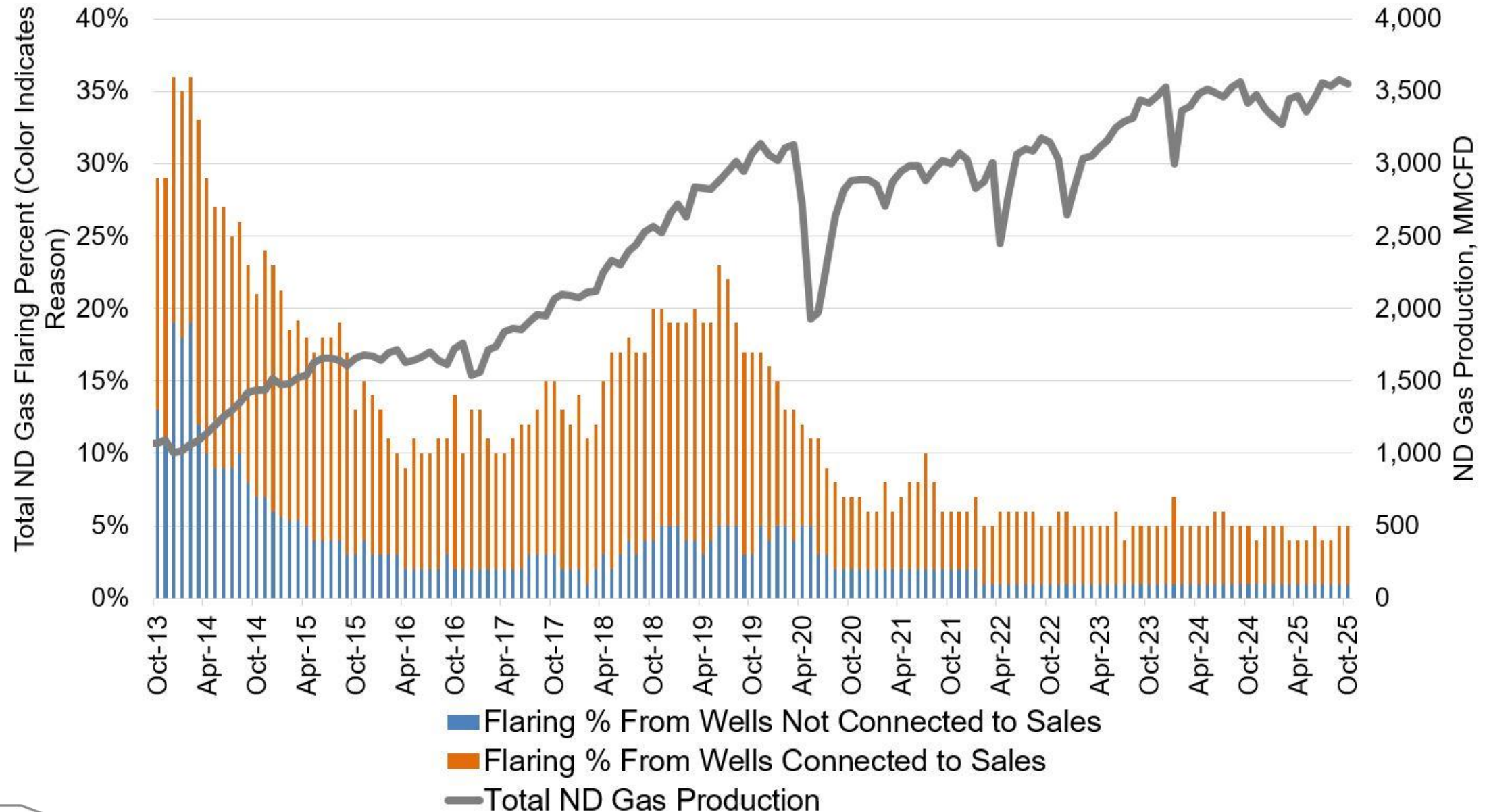
## Simple Terms

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

Oct. 2025 Data – Non-Confidential Wells

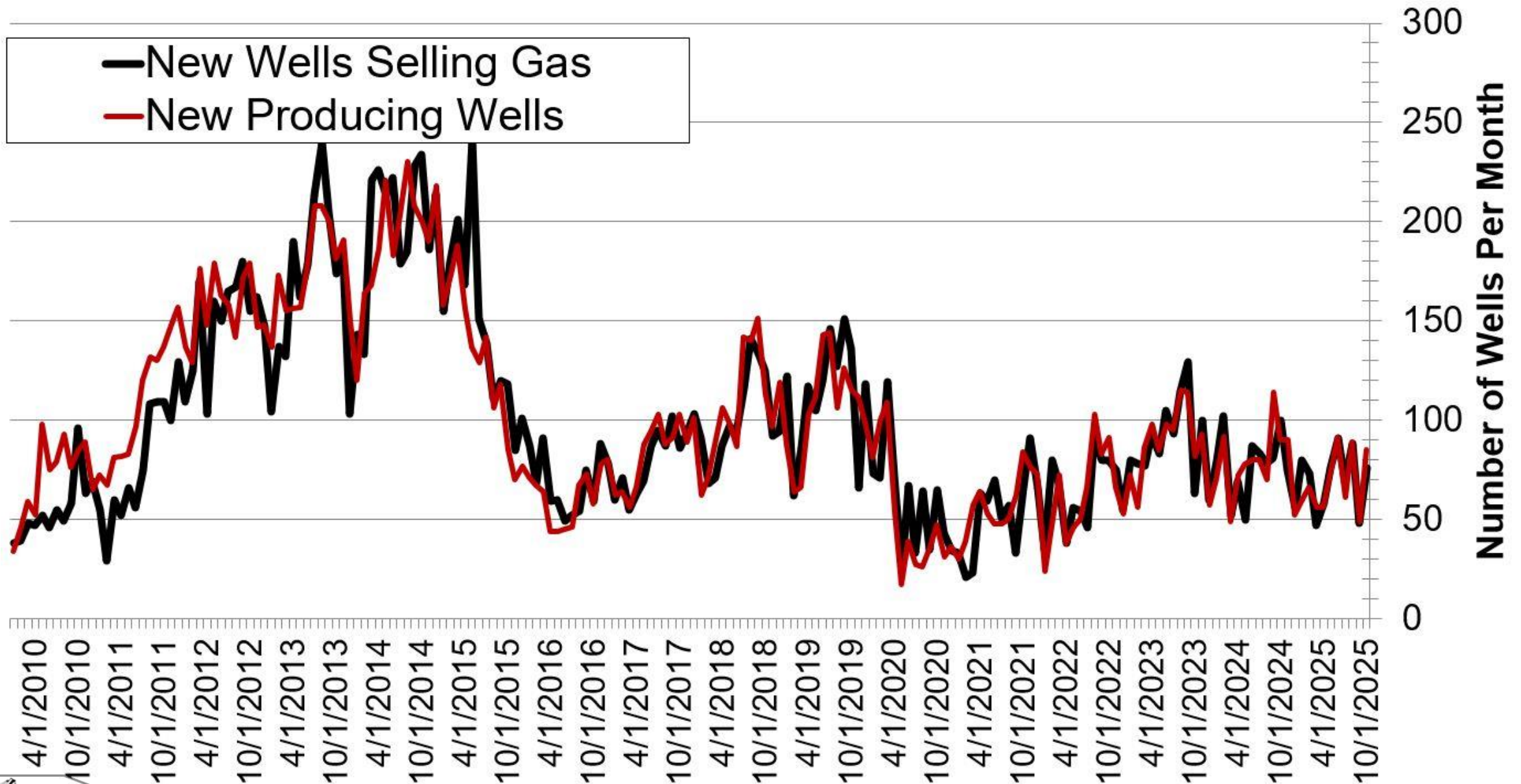


# Solving the Flaring Challenge



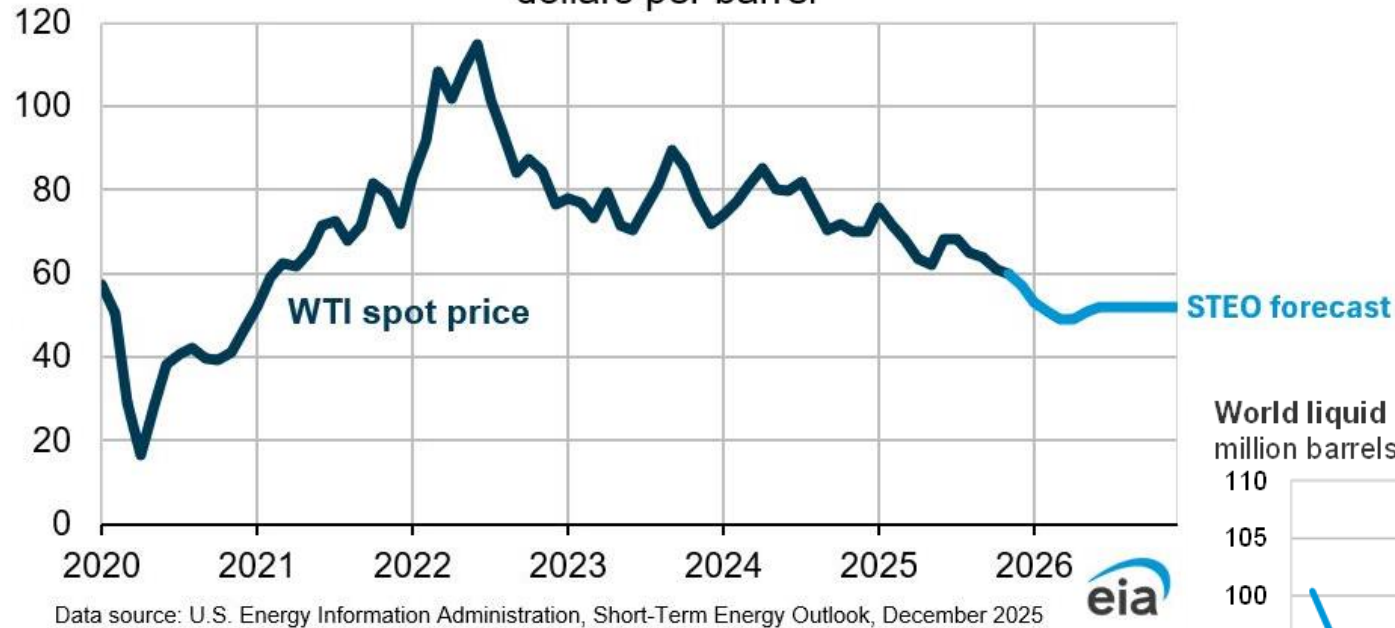


# Solving the Flaring Challenge

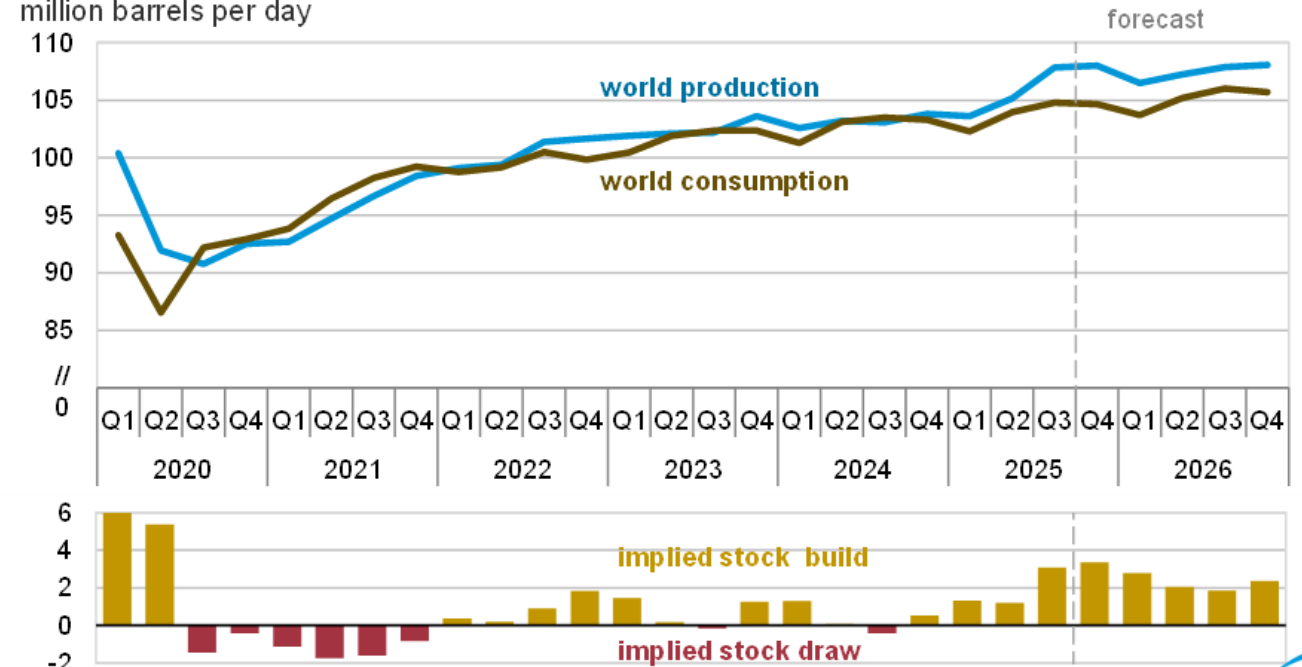


# EIA Oil Price Outlook (December 2025)

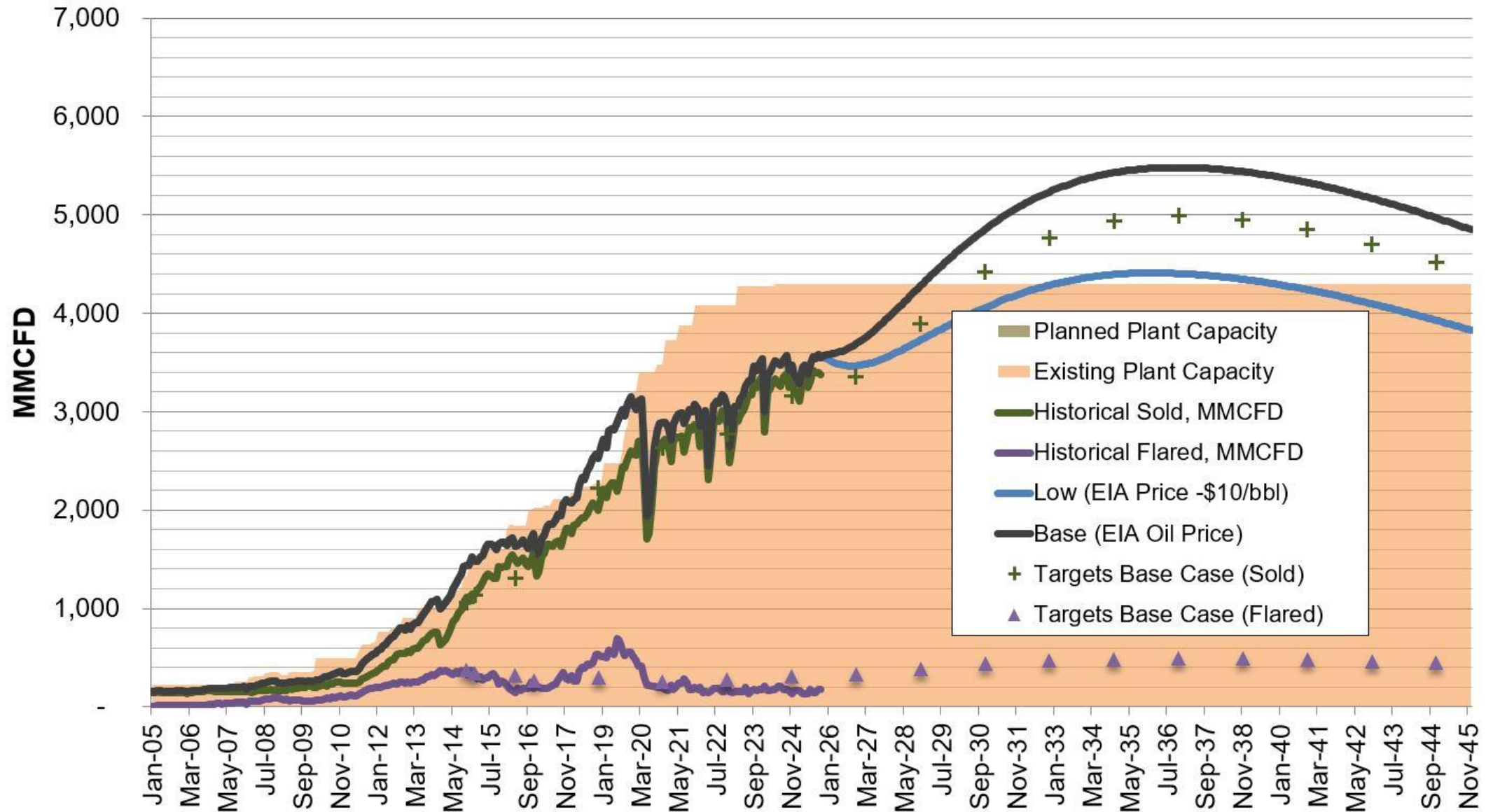
West Texas Intermediate (WTI) crude oil price  
dollars per barrel



World liquid fuels production and consumption balance  
million barrels per day

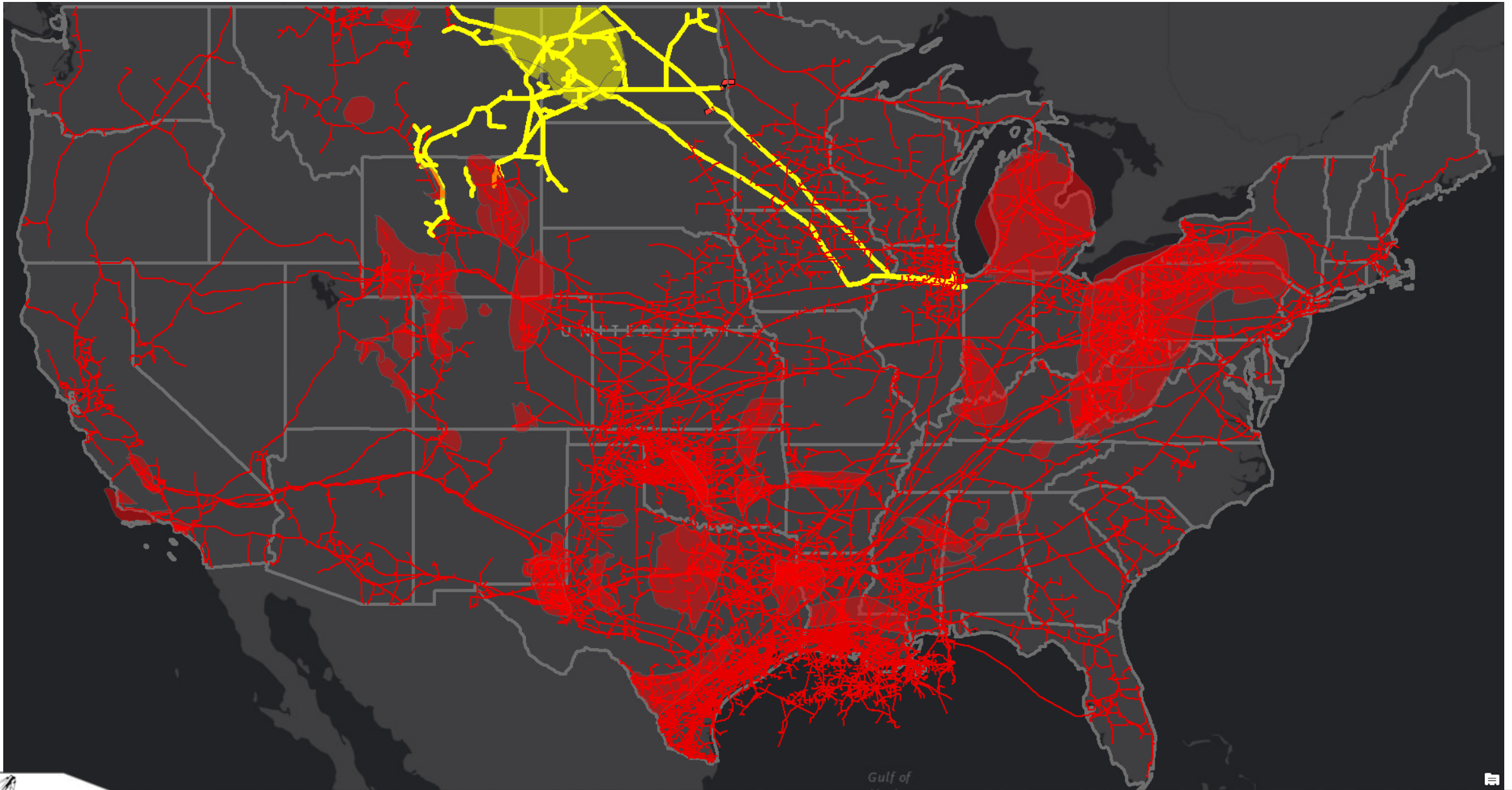


# North Dakota Gas Processing Outlook

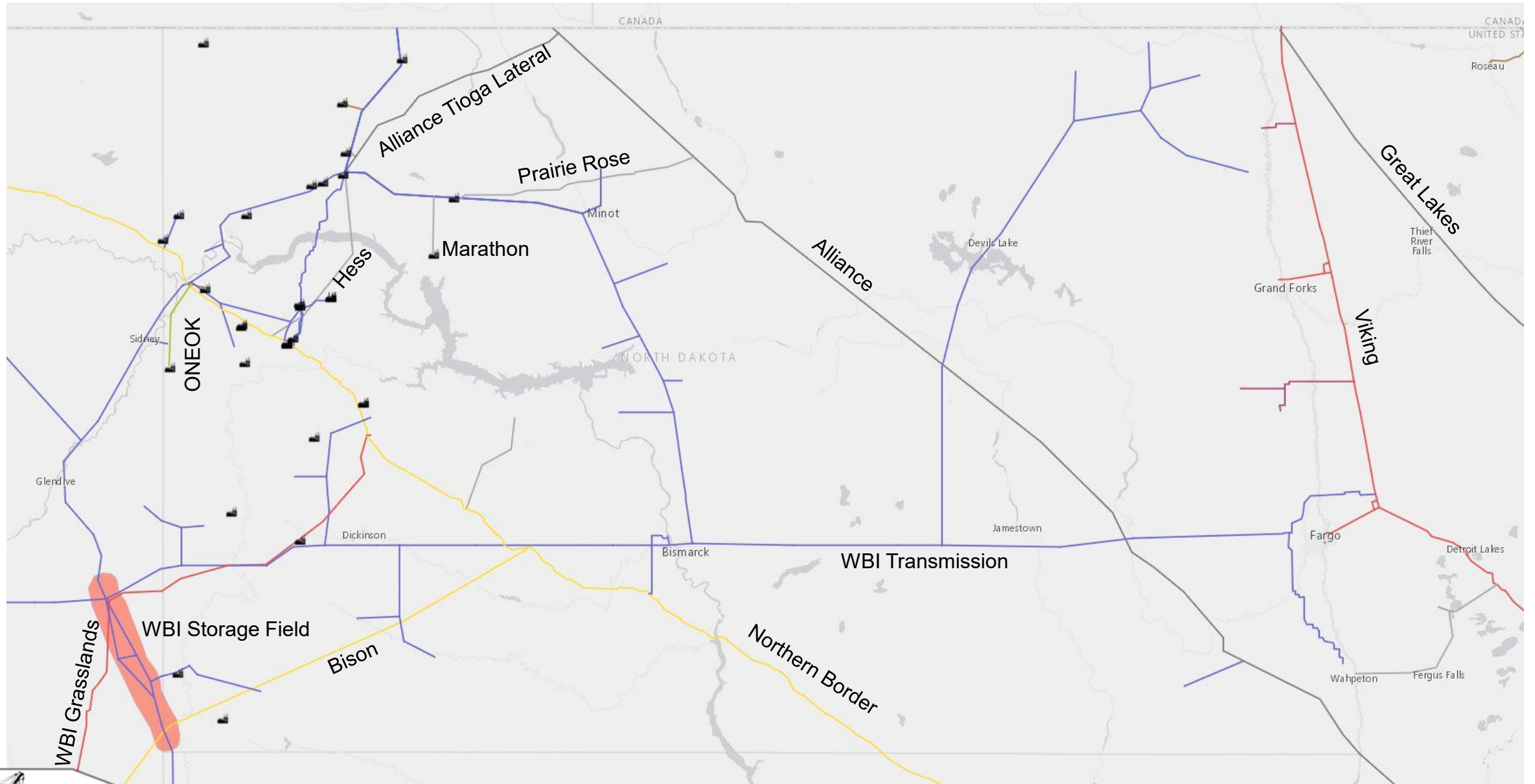




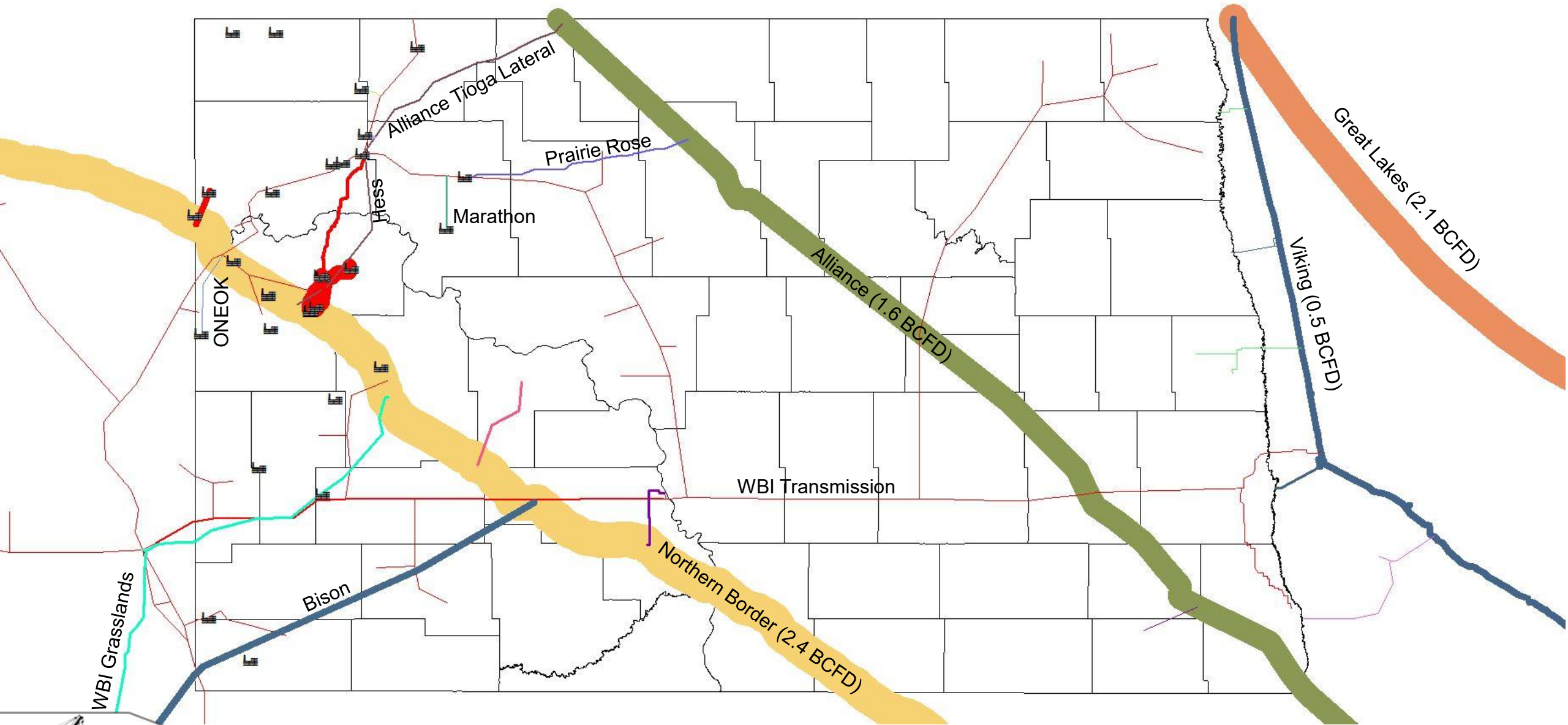
# Bakken Natural Gas Infrastructure



# Major Residue Gas Pipeline Infrastructure

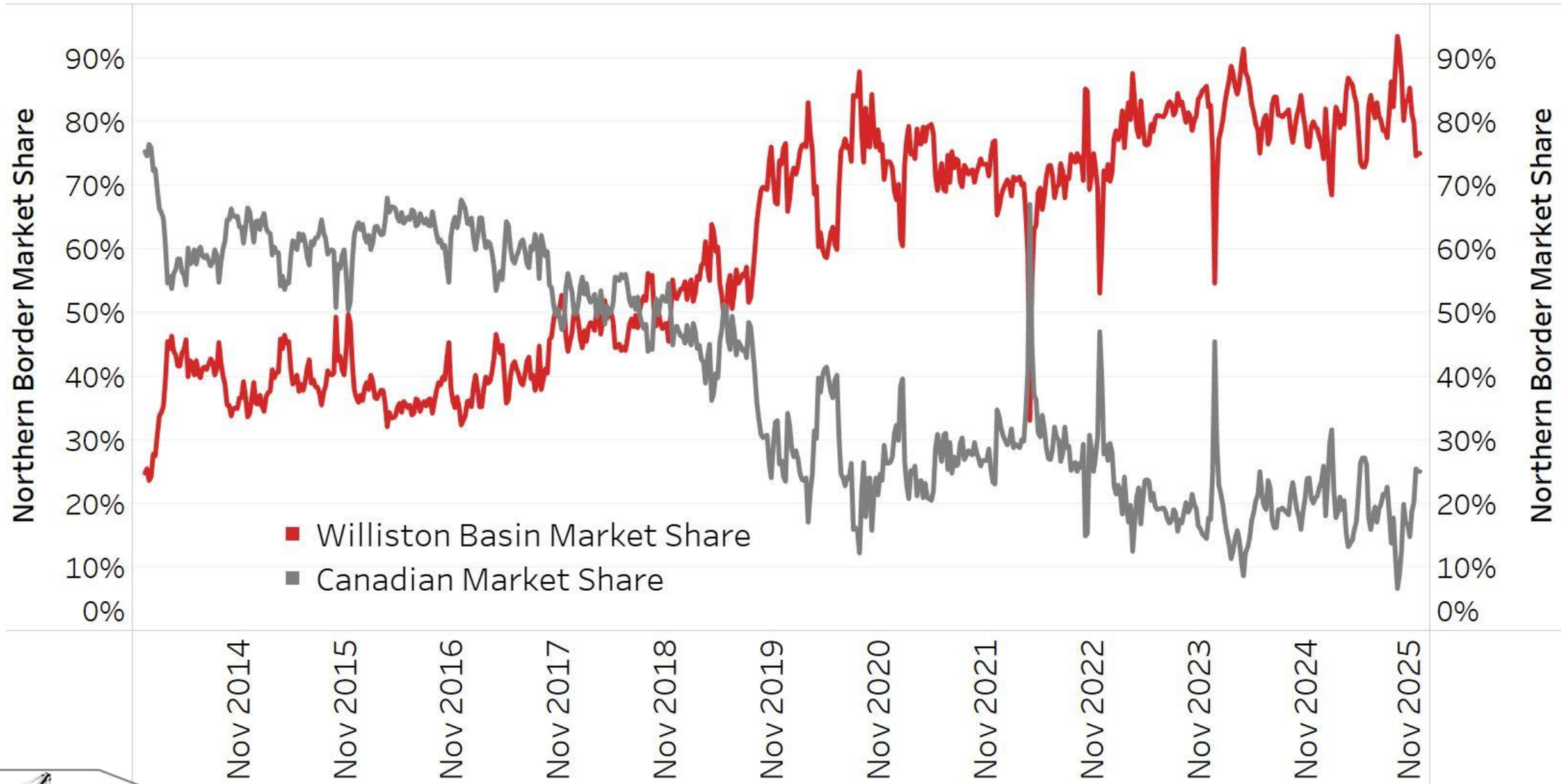


# Residue Gas Pipeline Capacity Visualization

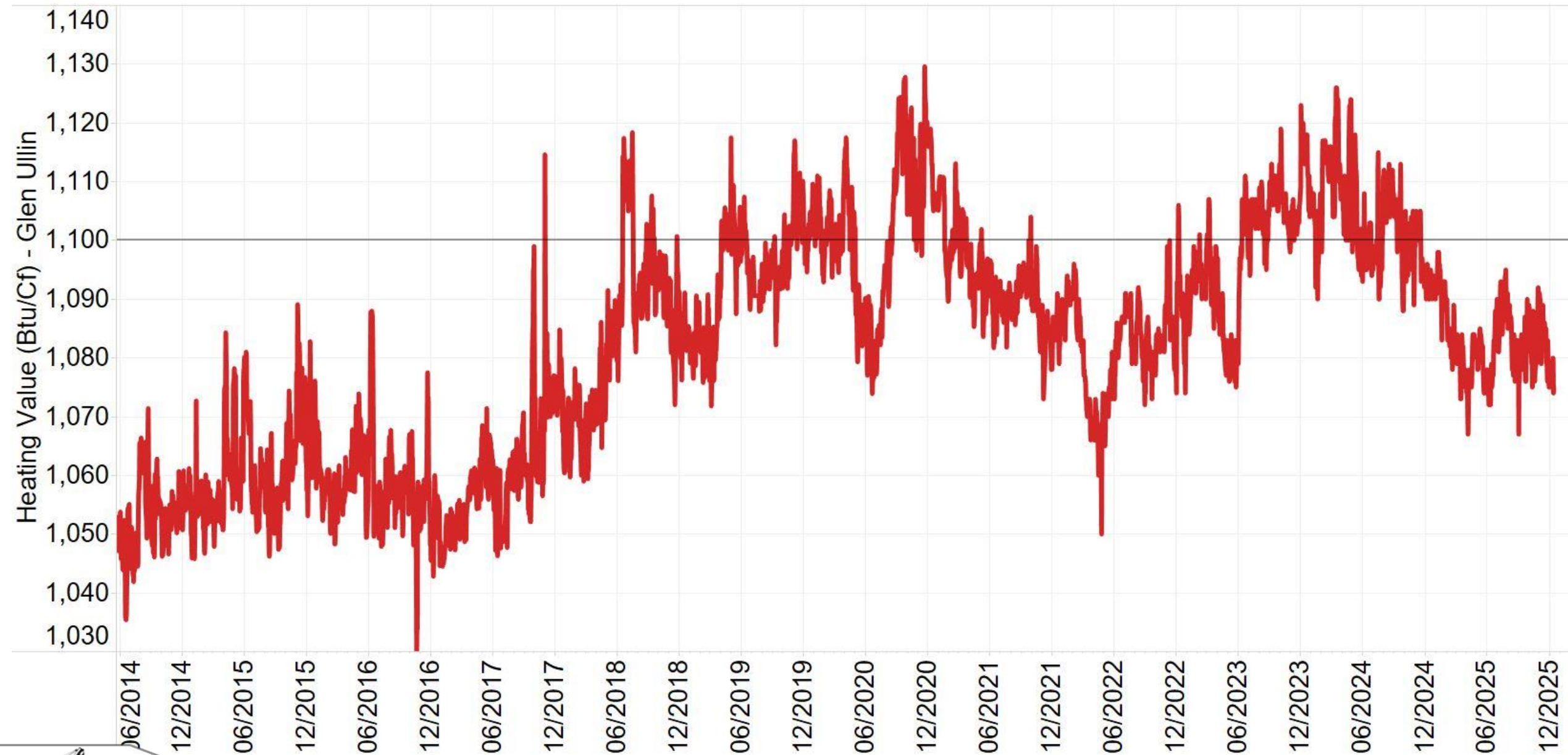




# Northern Border Pipeline Market Share



# Northern Border BTU at Glen Ullin, ND



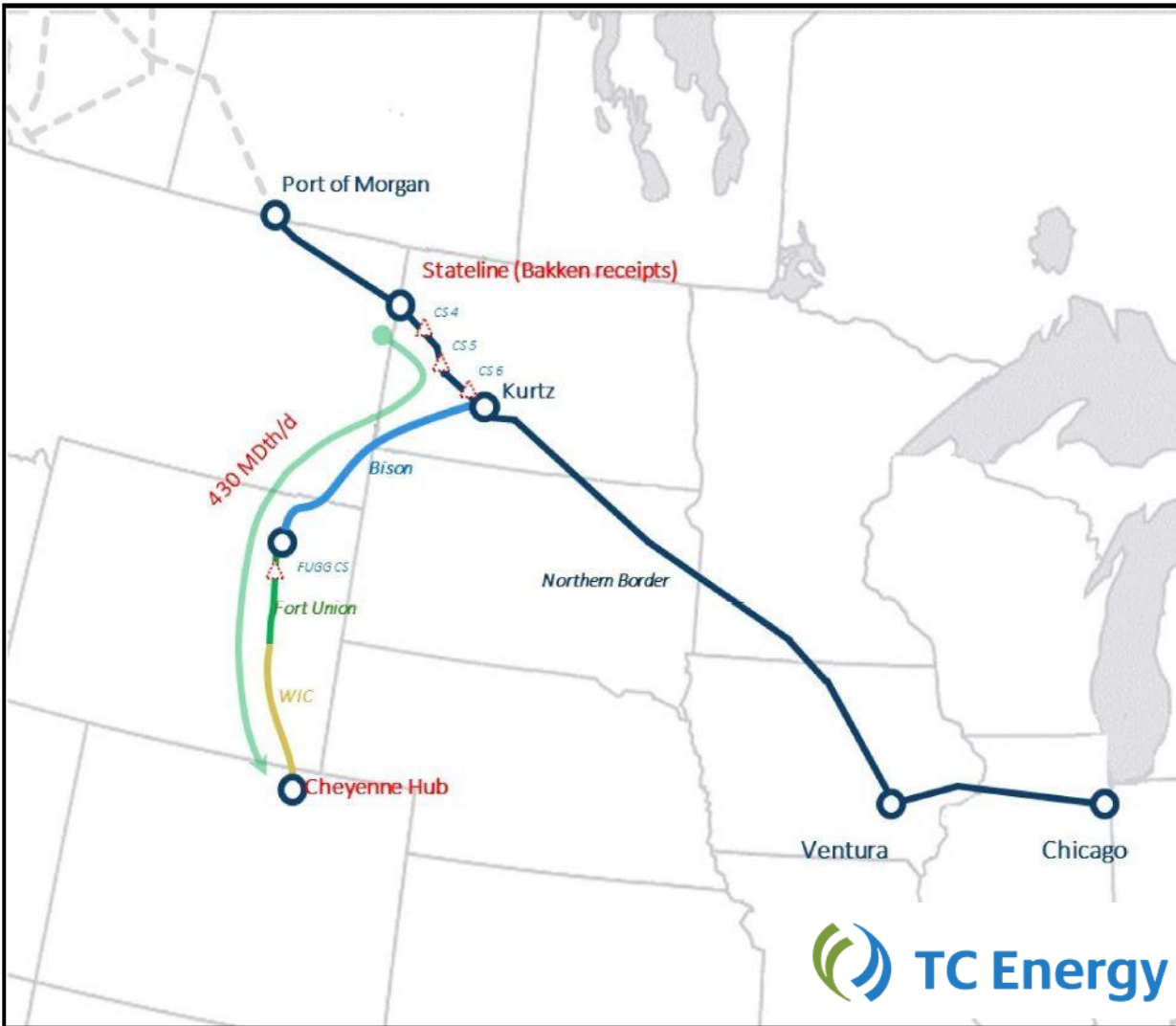
# TC Energy / Kinder Morgan: Bakken xPress Project

## Project Highlights

- Non-binding open season April 4 - May 6, 2022
- Binding Open Season: June 1-30, 2023
- Three compressor upgrades in North Dakota
- Reverse the idle Bison Pipeline (30" – 302 Mile)
- Capacity 300,000 Dth/Day (430,000 Offered)
- **May 2026** targeted in-service date
- Fort Union Gas Gathering and Wyoming Interstate Company provide further transport to Cheyenne hub.
- Seeking commitments 10yrs or Longer
- \$555 million: \$347 Replacement/\$208 Expansion

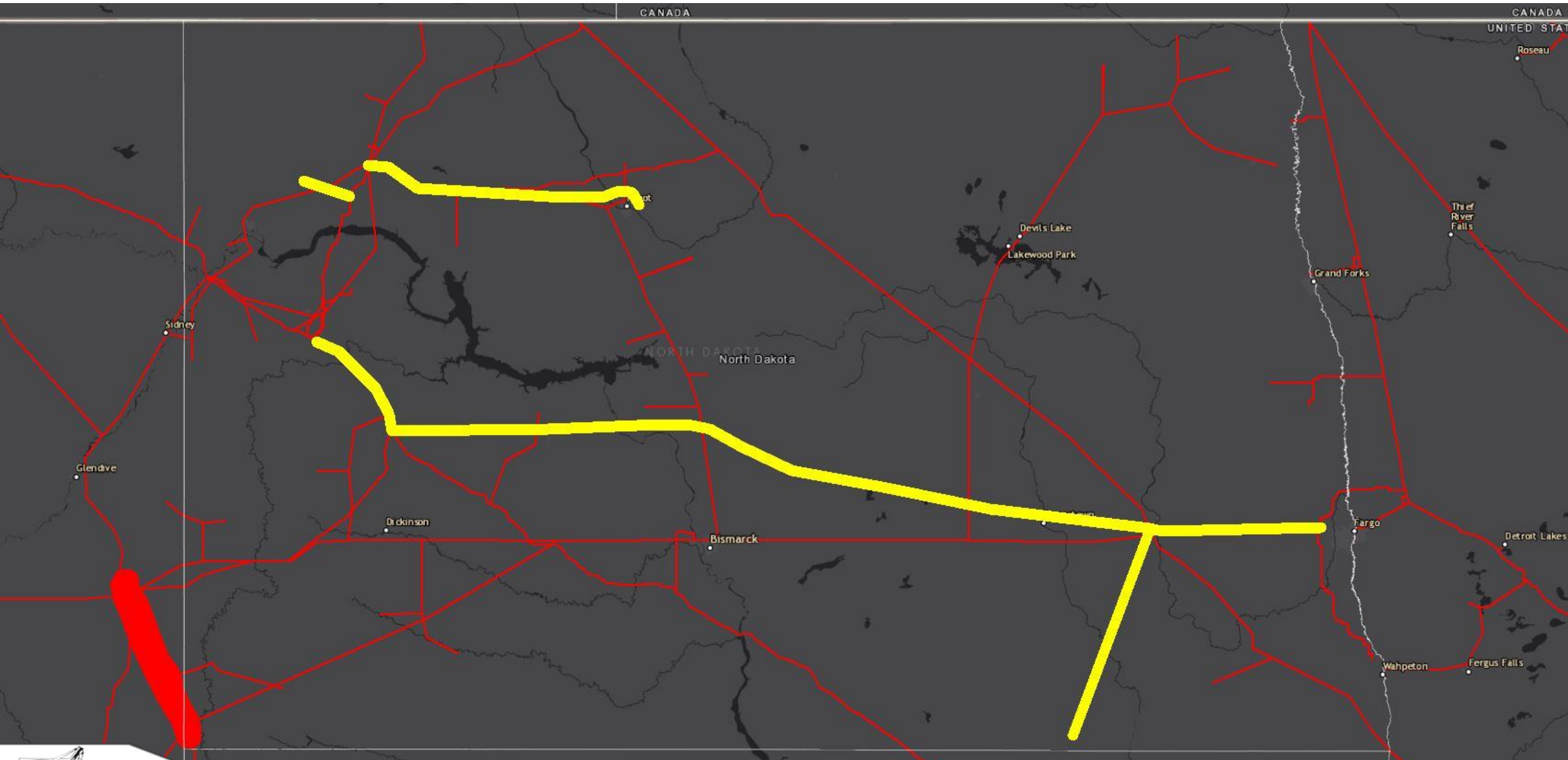
## Proposed Rates

- NBPL/Bison \$0.45/Dth + Fuel/Elec to WIC/FUG Interconnect
- WIC/FUG to Cheyenne \$0.30/Dth + Fuel/Elec
- Anchor Shipper Minimum: 50,000 Dth/Day

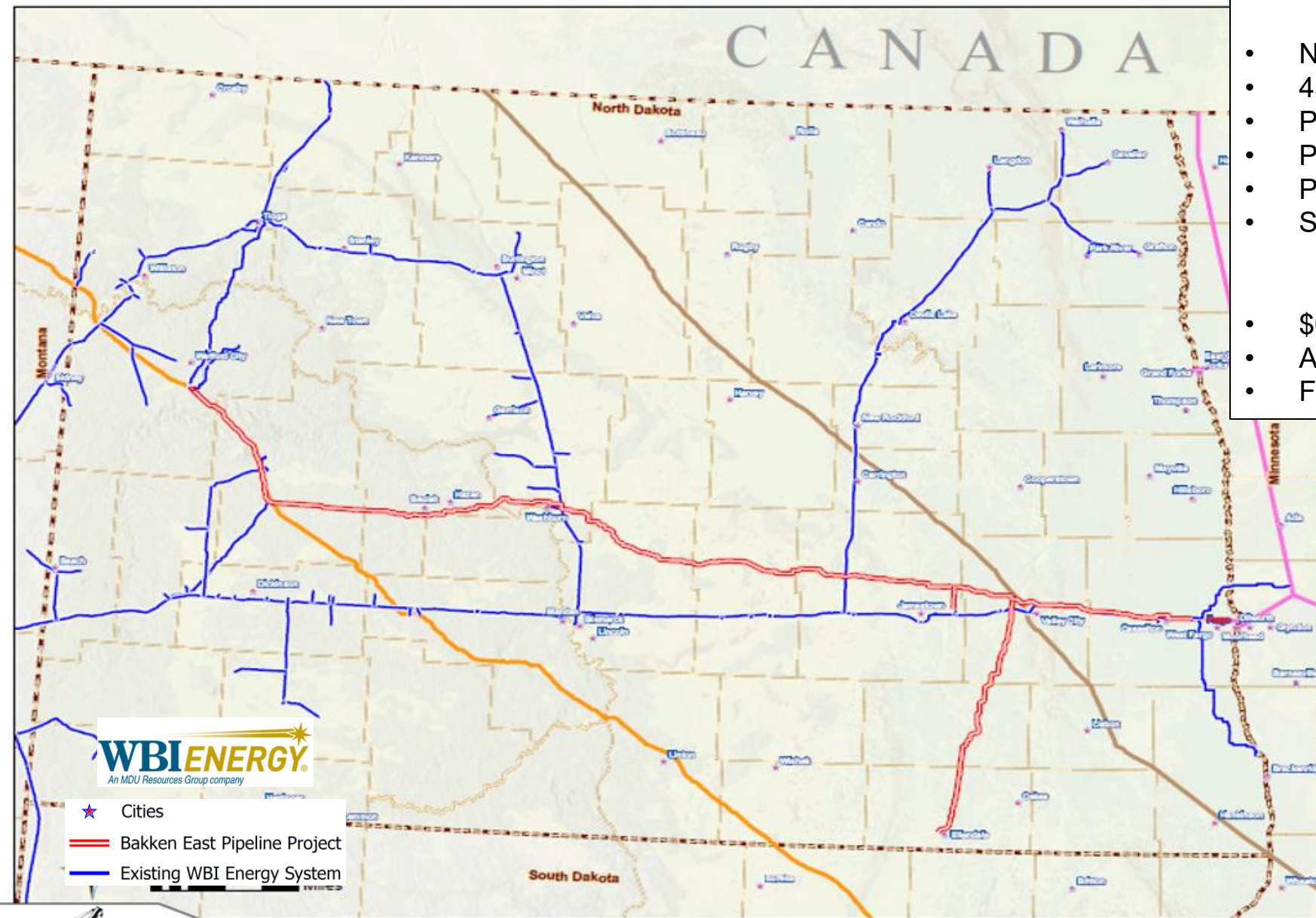




# Beyond 2026: Gas Transmission Projects



# 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

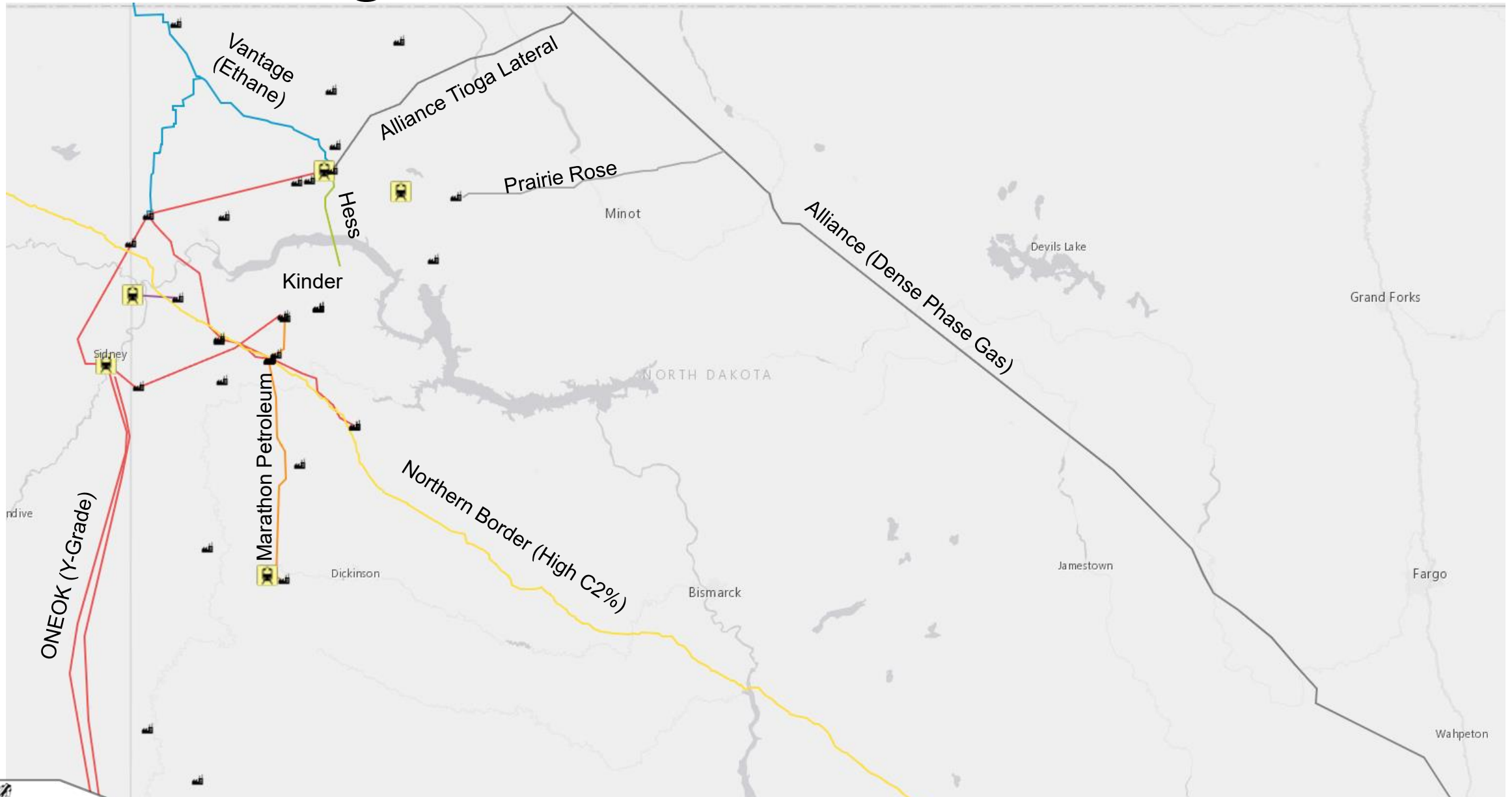
## Estimated Rates

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





# Regional NGL Infrastructure





# Contact Information

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