

Pipeline Authority Monthly Update

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January 23, 2026

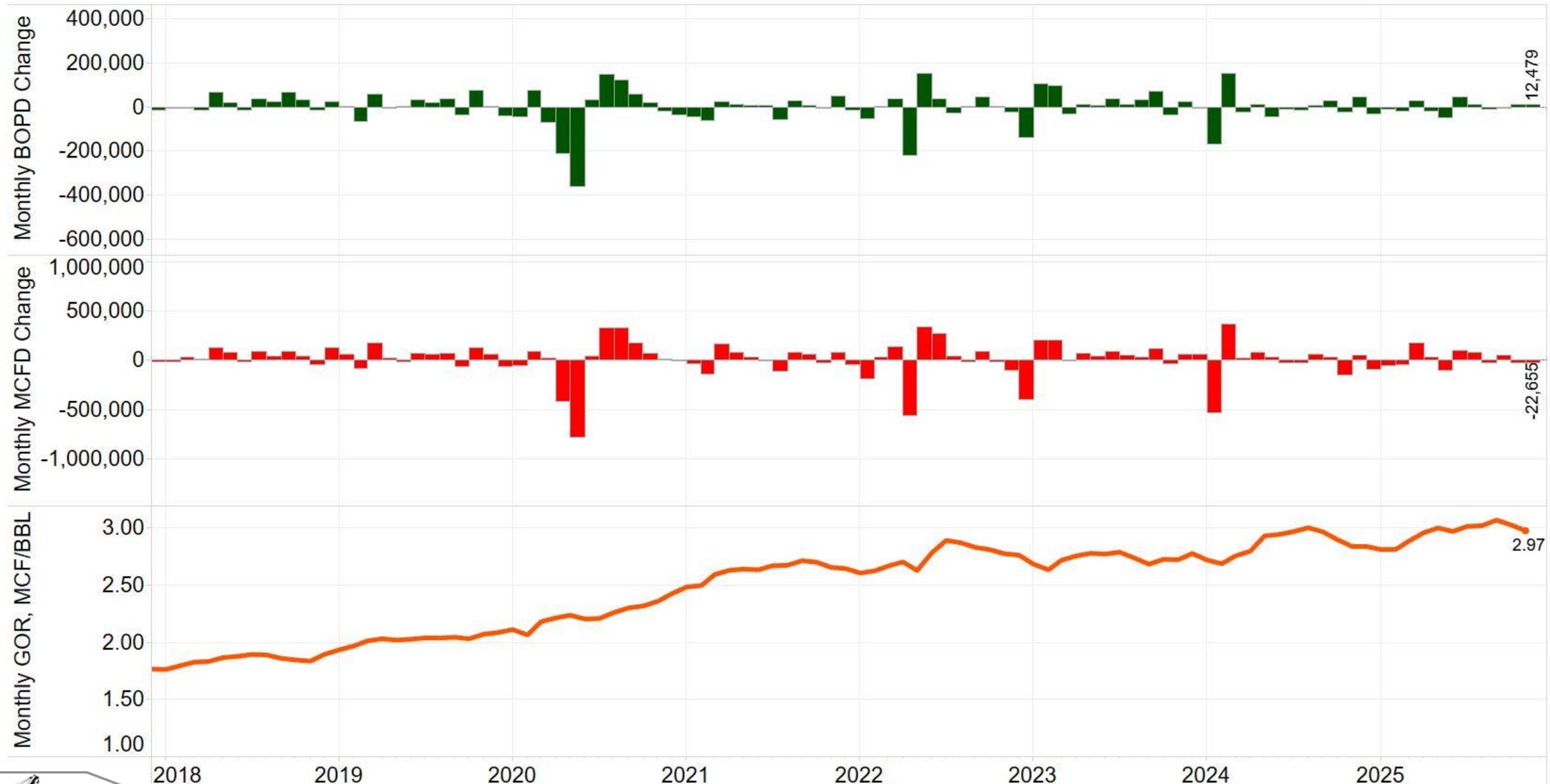


US Williston Basin Oil Production - 2025

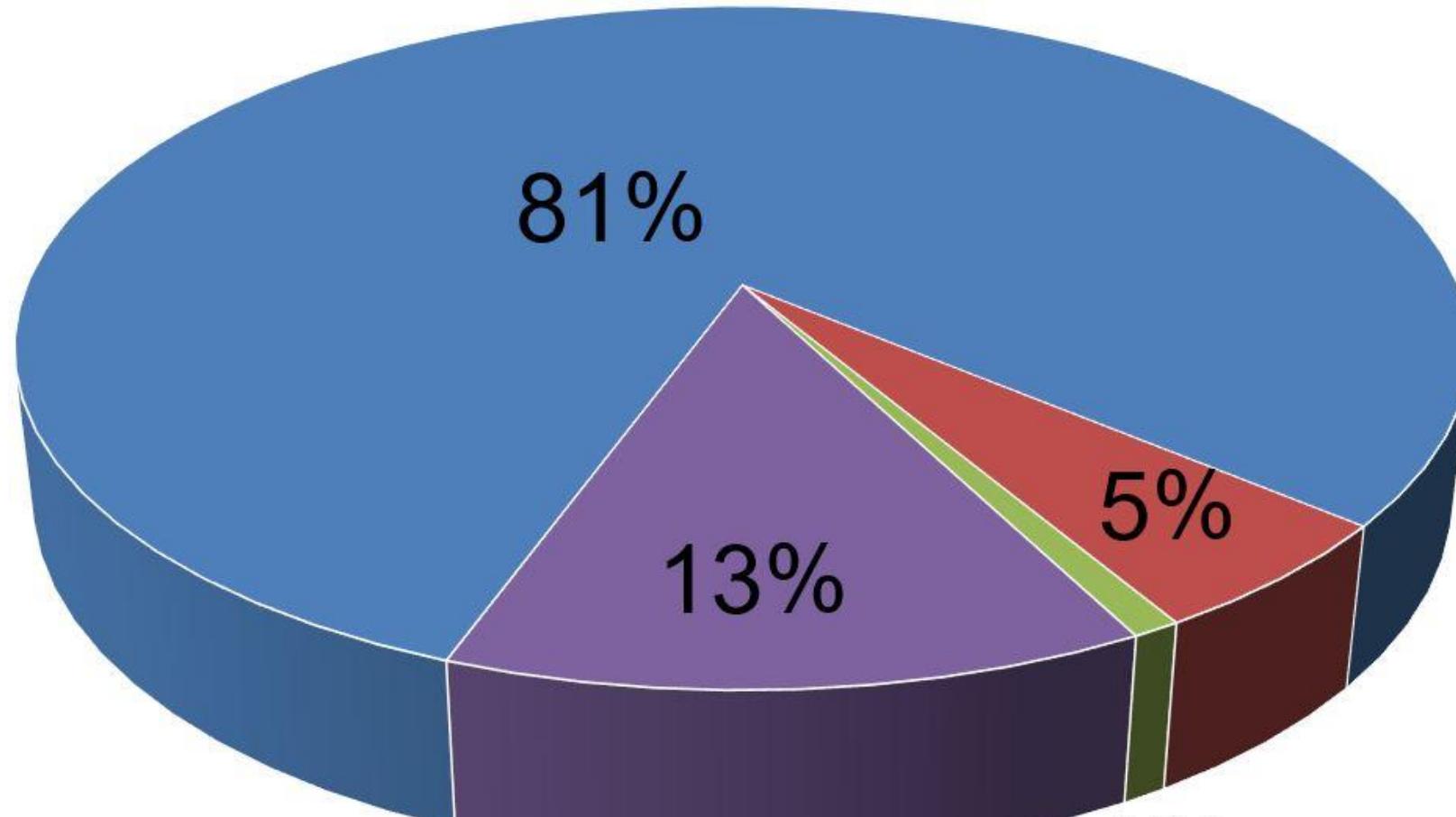
MONTH	ND	Eastern MT*	SD	TOTAL
January	1,183,056	75,046	2,281	1,260,383
February	1,165,203	71,714	2,282	1,239,199
March	1,195,005	76,008	2,272	1,273,285
April	1,175,903	74,892	2,294	1,253,089
May	1,126,490	79,642	2,295	1,208,427
June	1,172,138	79,694	2,145	1,253,977
July	1,183,466	80,465	2,271	1,266,202
August	1,170,948	76,515	2,218	1,249,681
September	1,170,564	80,690	2,253	1,253,507
October	1,176,625	83,756	2,221	1,262,602
November	1,189,104	76,446		
December				



North Dakota Monthly Production Change



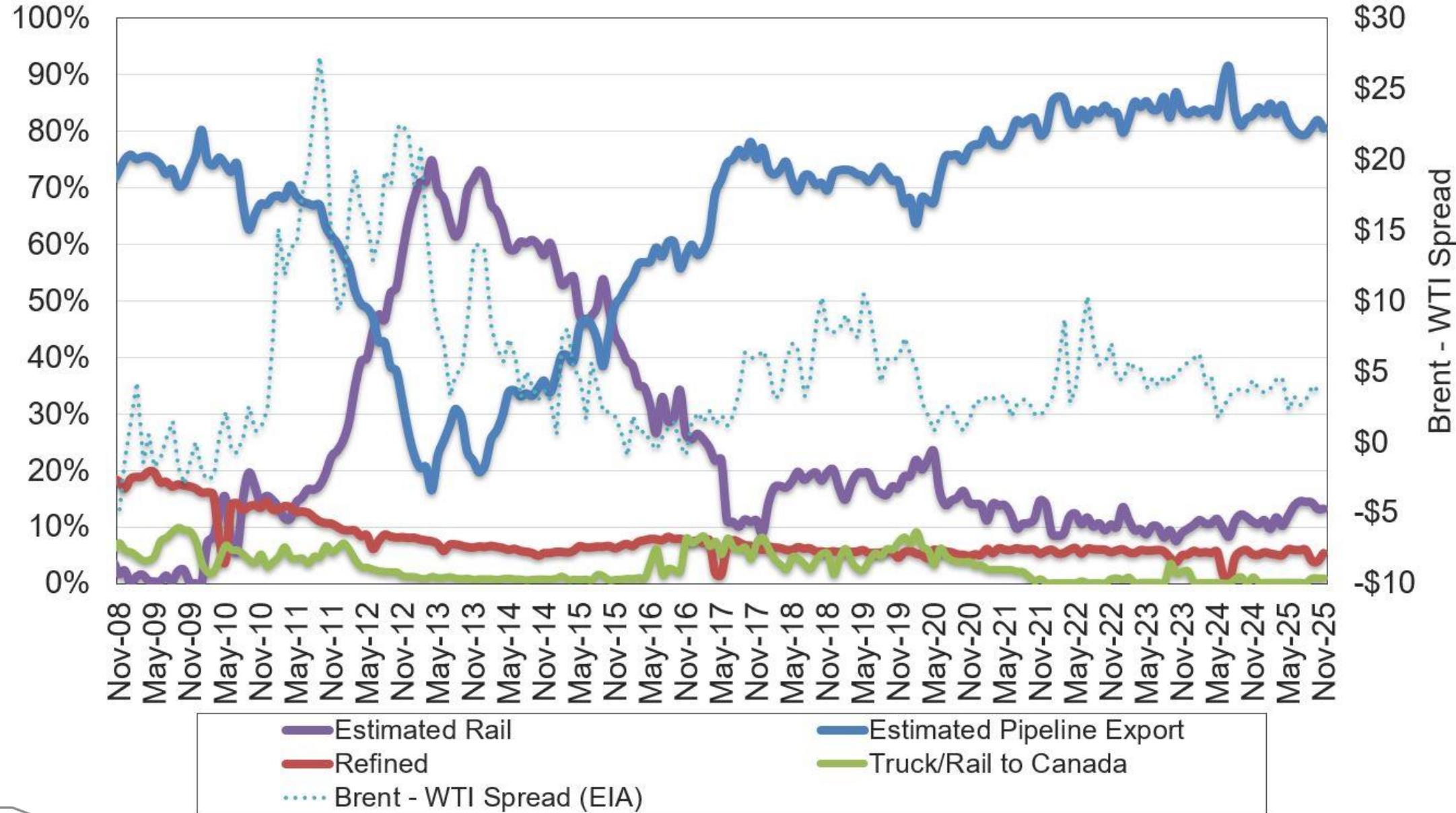
Estimated Williston Basin Oil Transportation



- Pipeline Export
- Truck/Rail to Canada
- Refined
- Estimated Rail



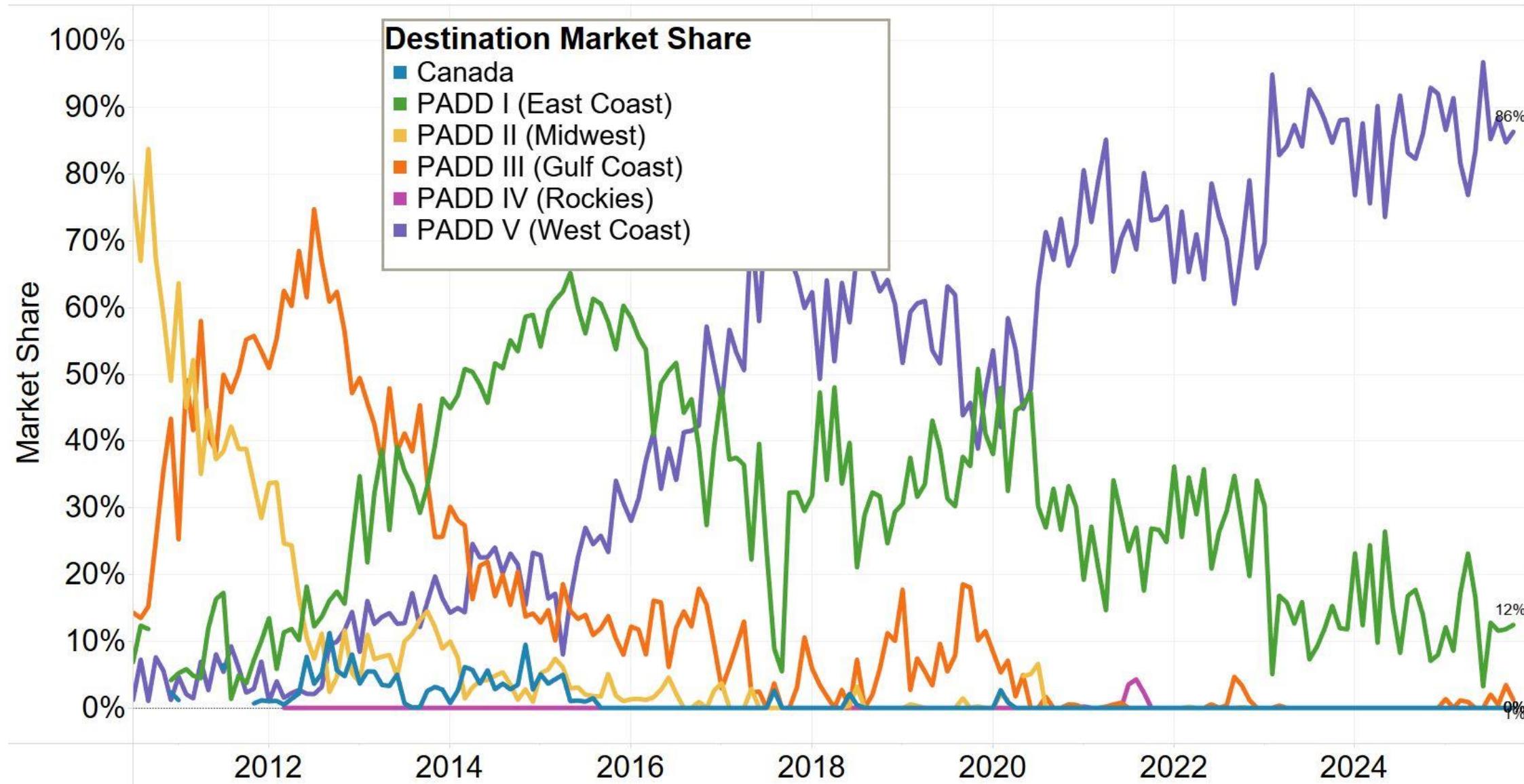
Estimated Williston Basin Oil Transportation



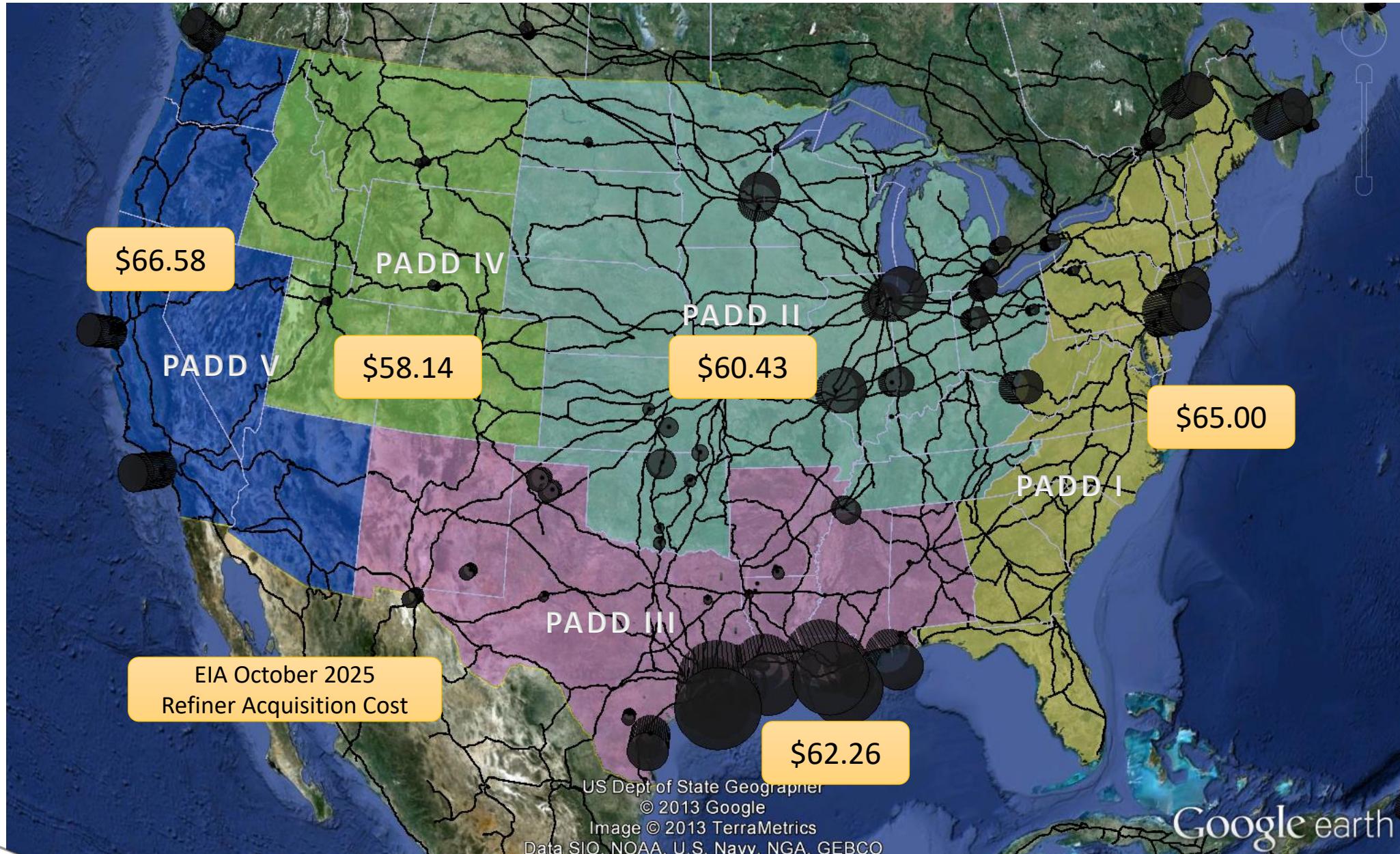
Estimated ND Rail Export Volumes



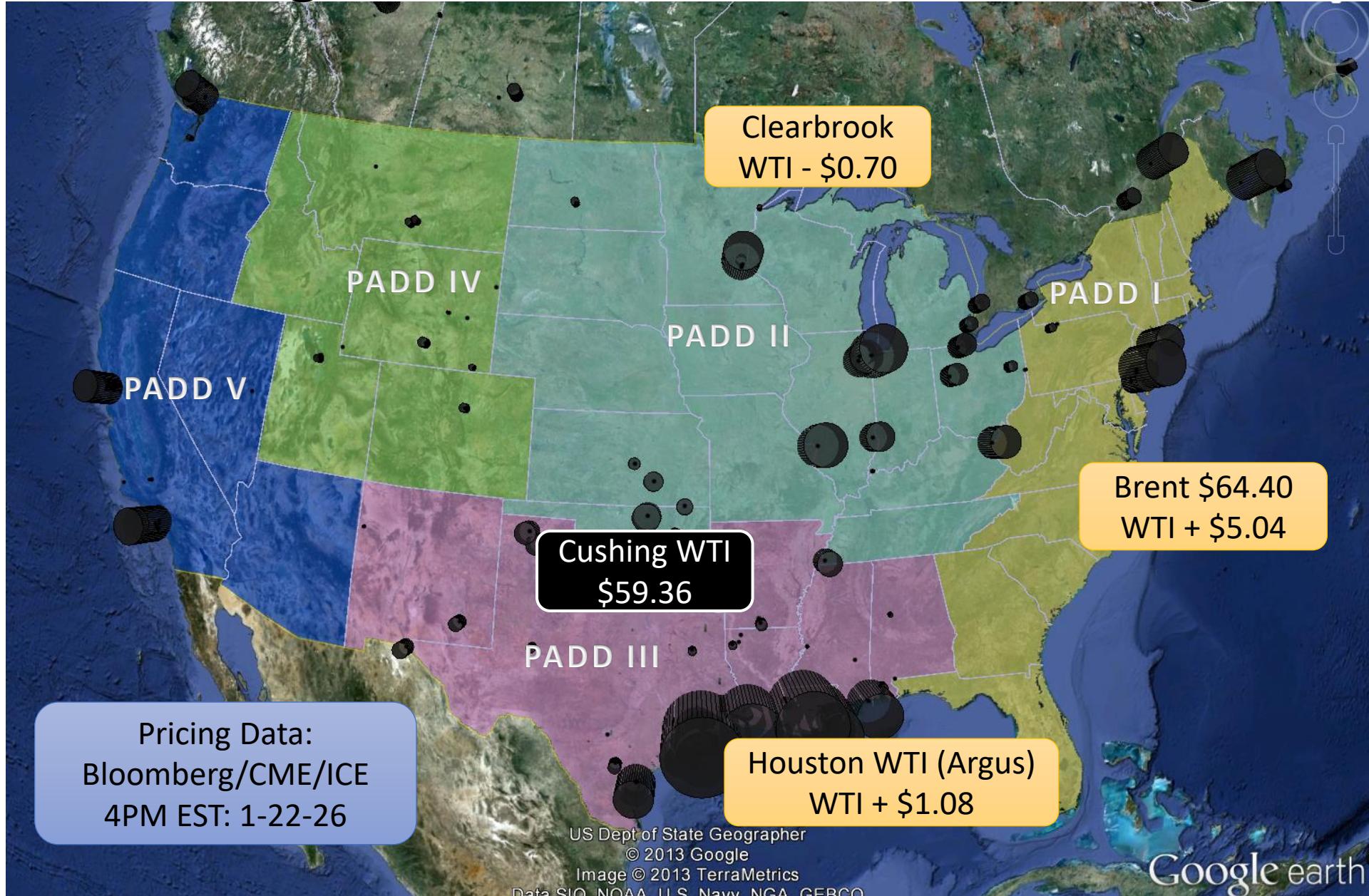
Rail Destinations Market Share (Oct. 2025)



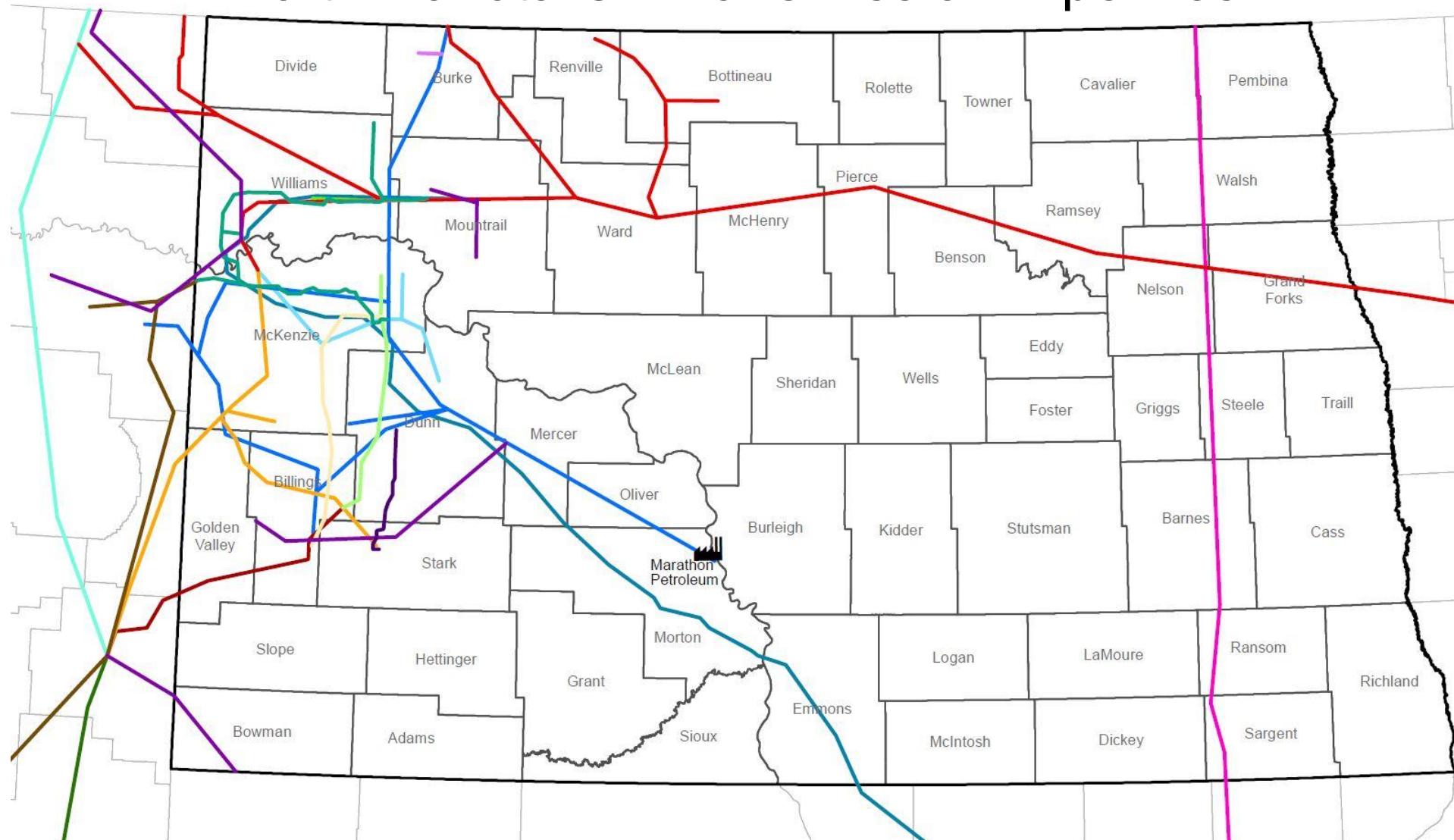
Major Rail Lines and Refineries



Major Pricing Benchmarks & Refining Centers



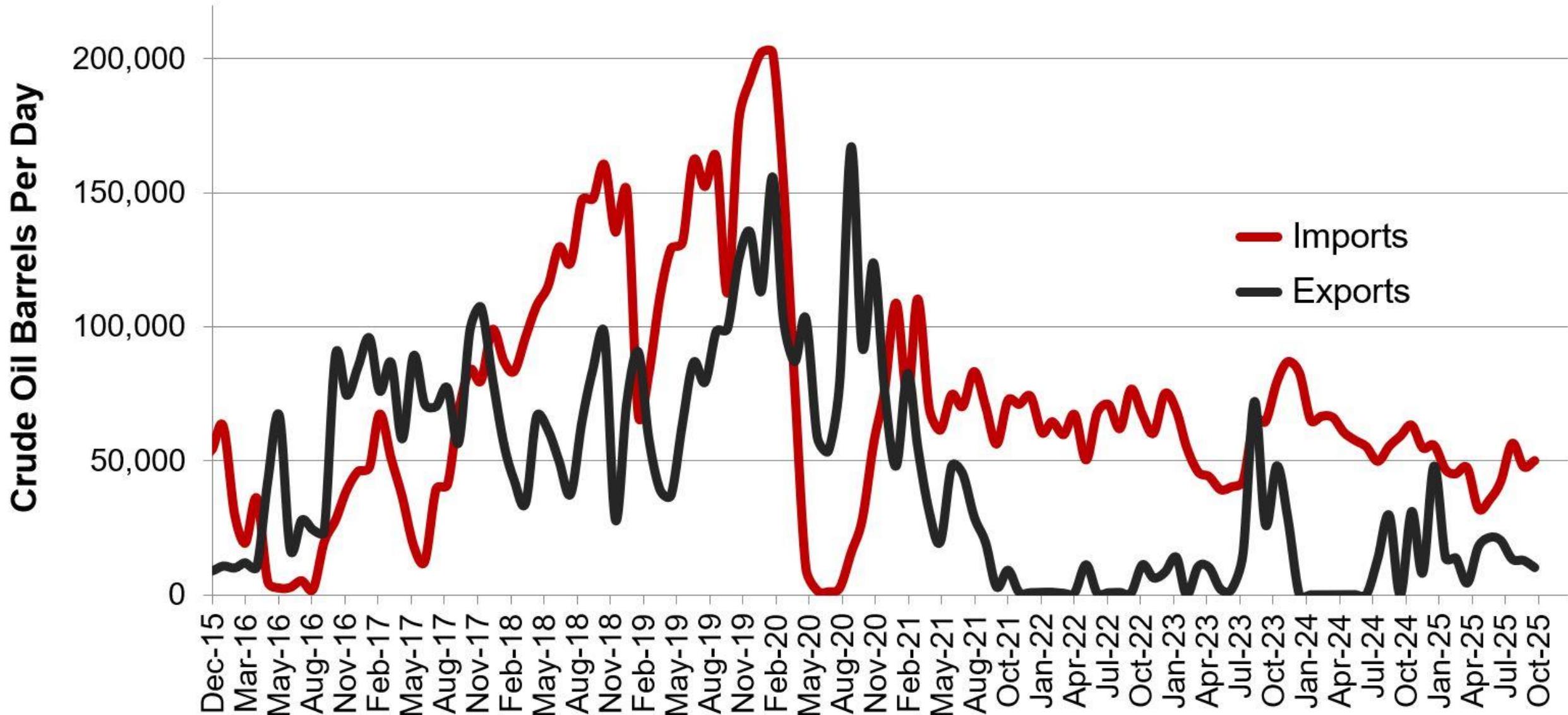
North Dakota Oil Transmission Pipelines



- 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



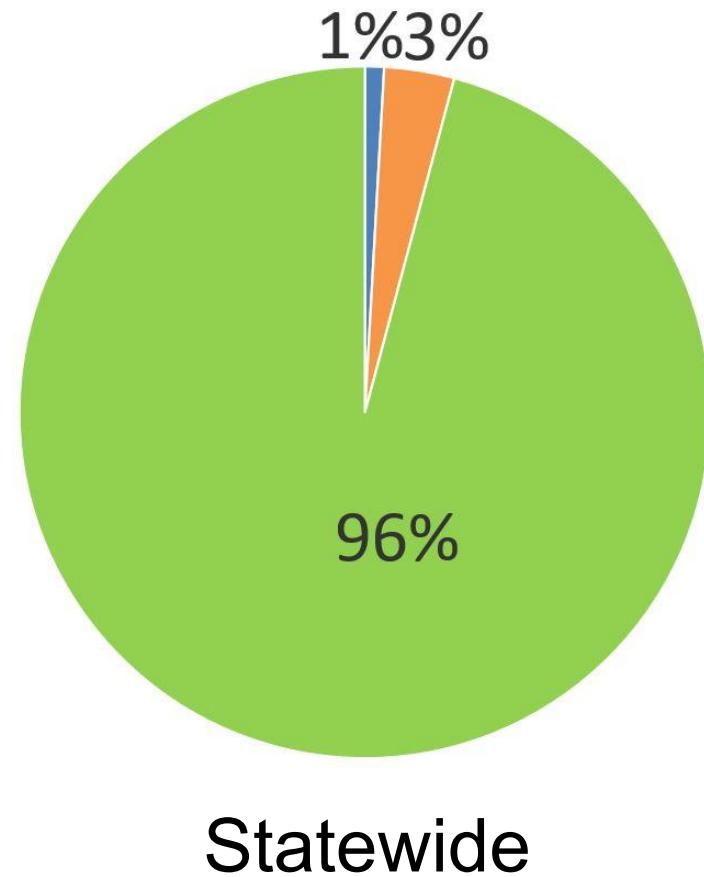
Williston Basin Imports and Exports with Canada



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



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

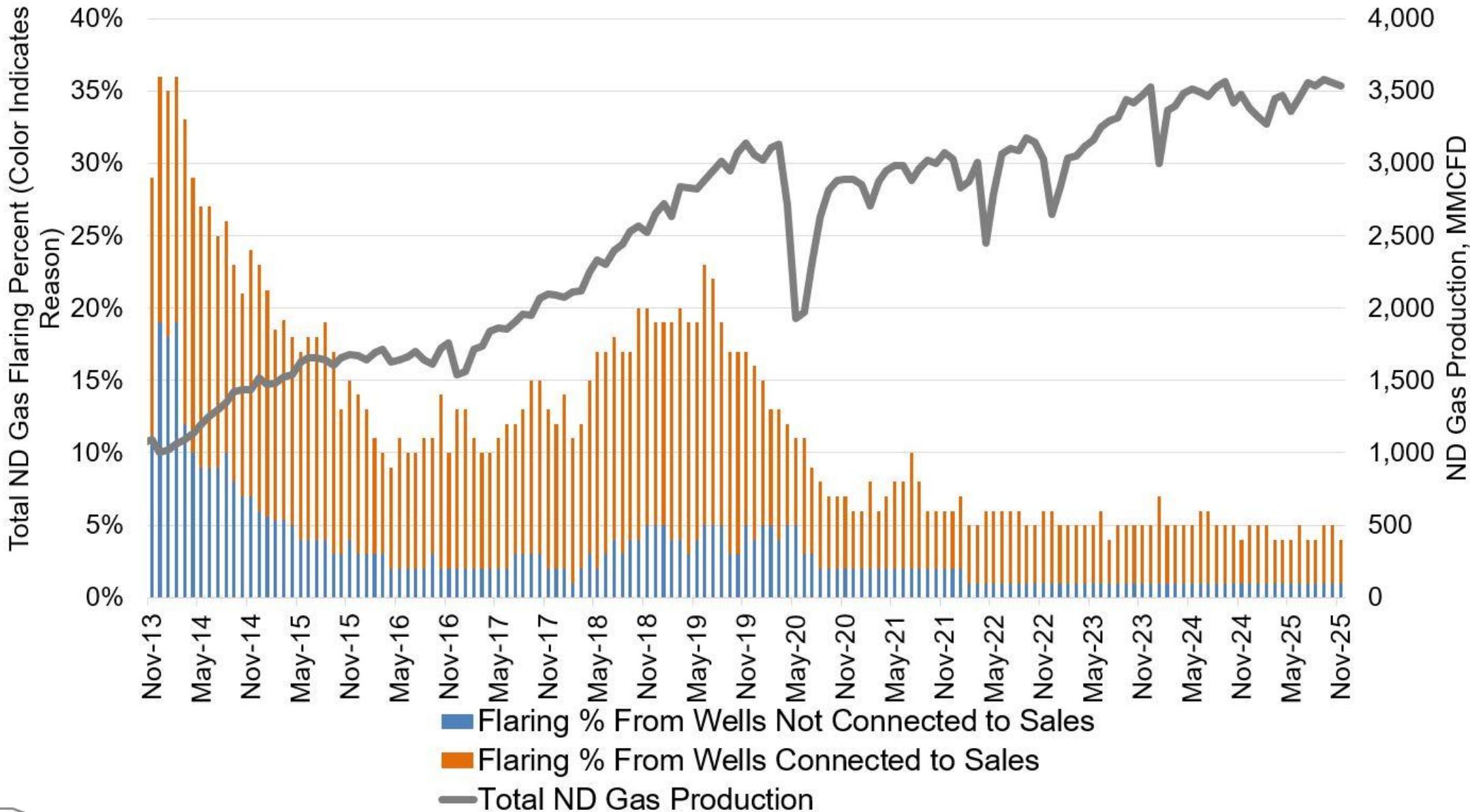
Simple Terms

Blue – Lack of pipelines
Orange – Challenges on existing infrastructure

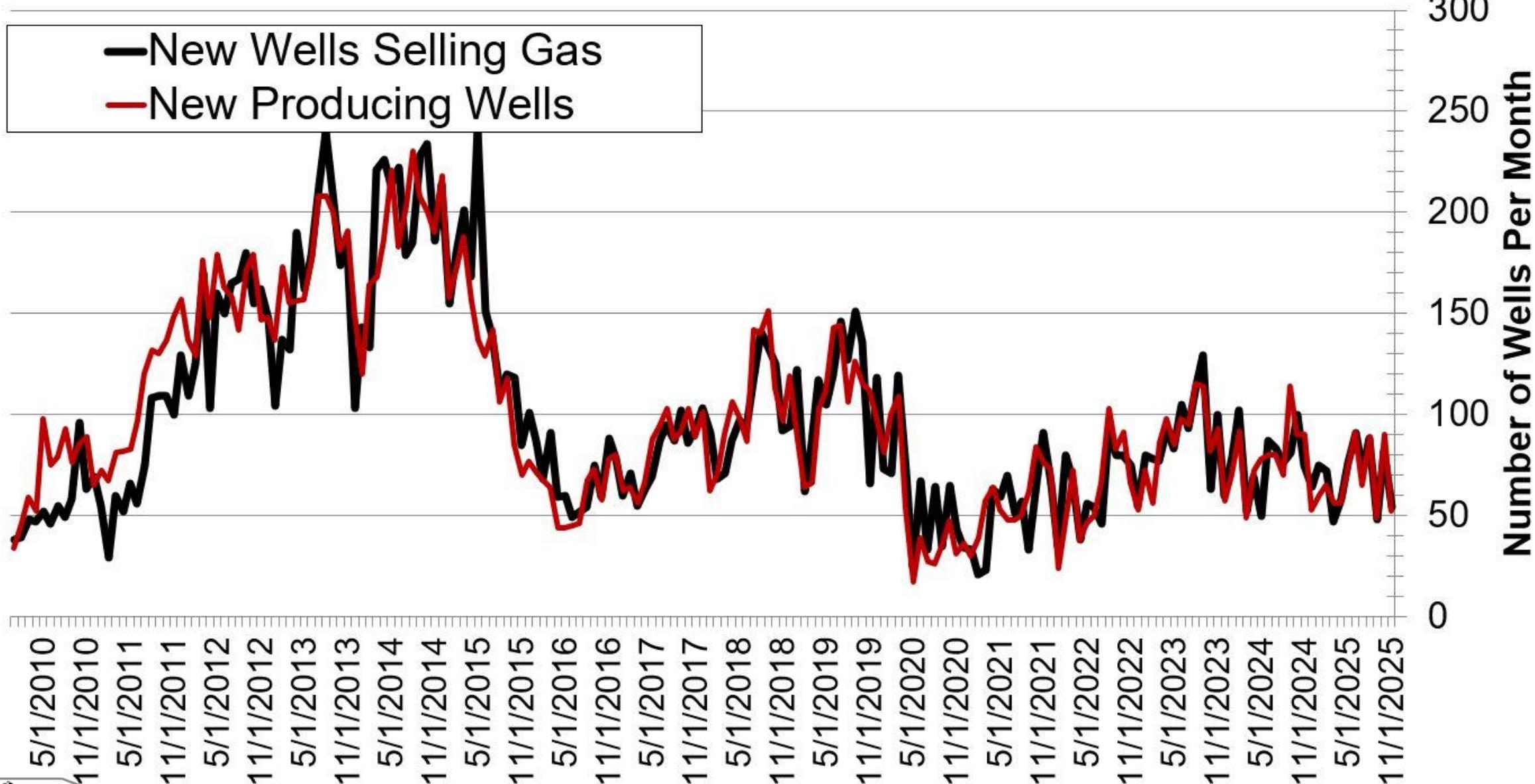
Nov. 2025 Data – Non-Confidential Wells



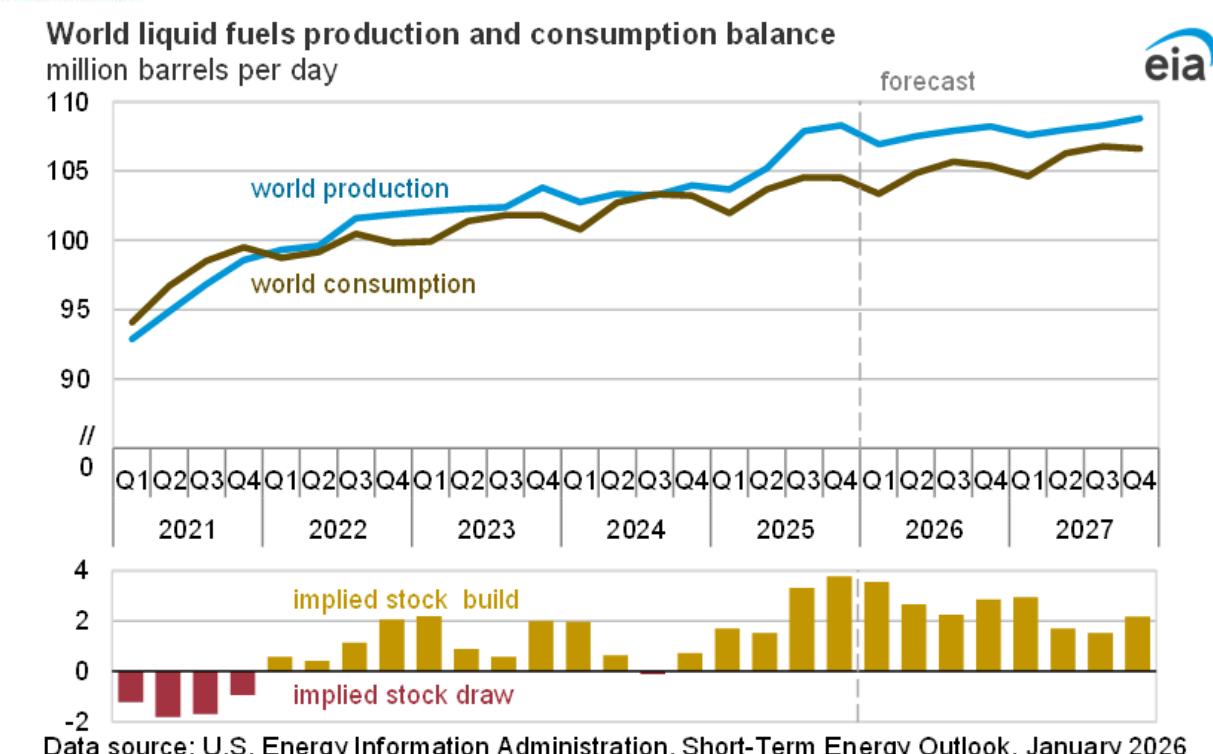
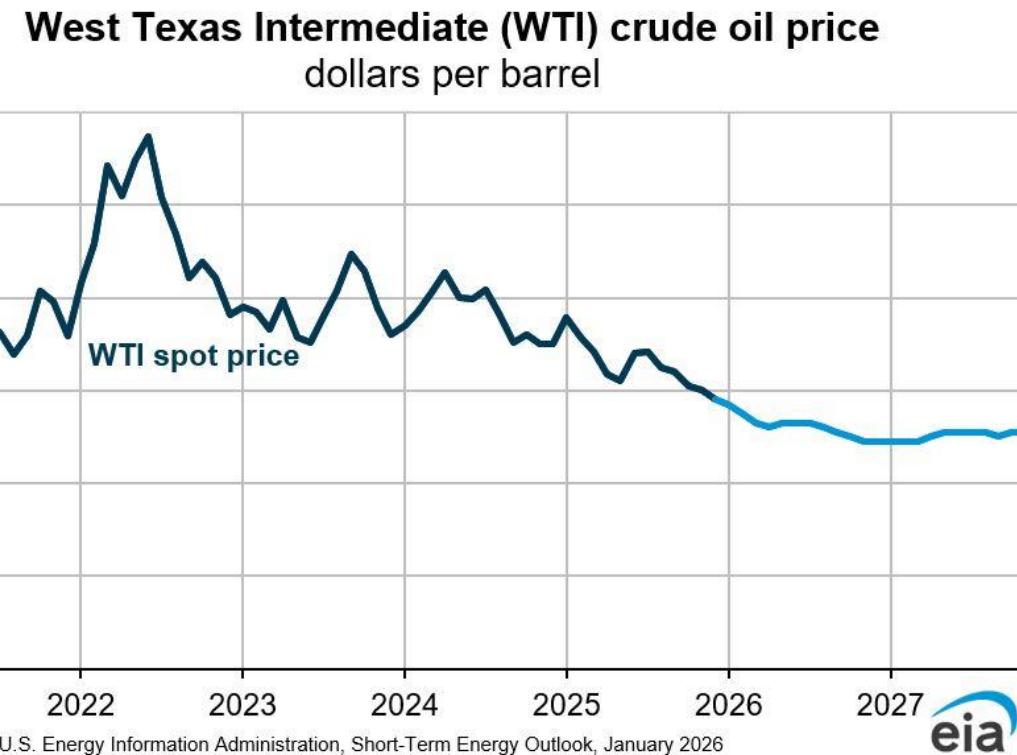
Solving the Flaring Challenge



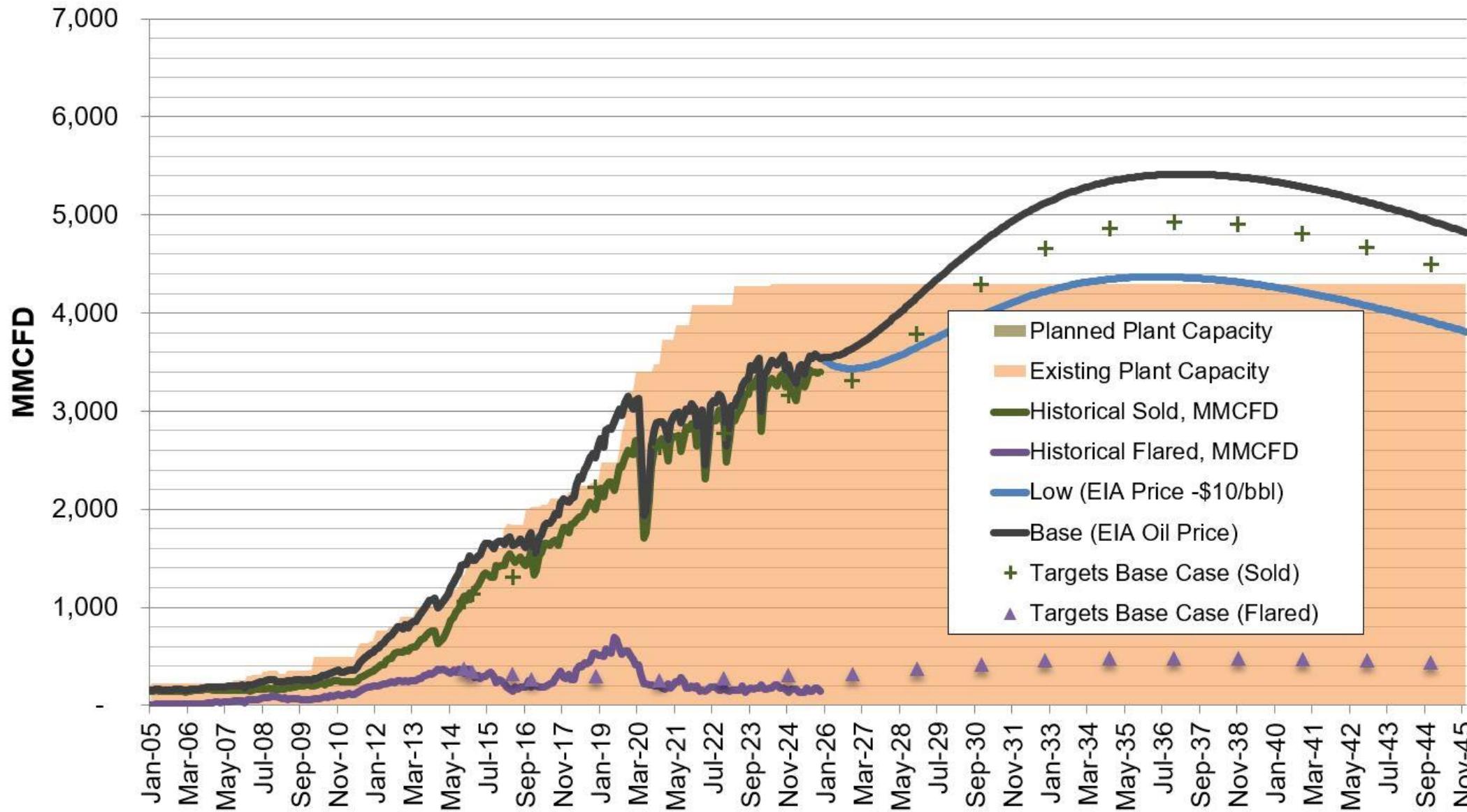
Solving the Flaring Challenge



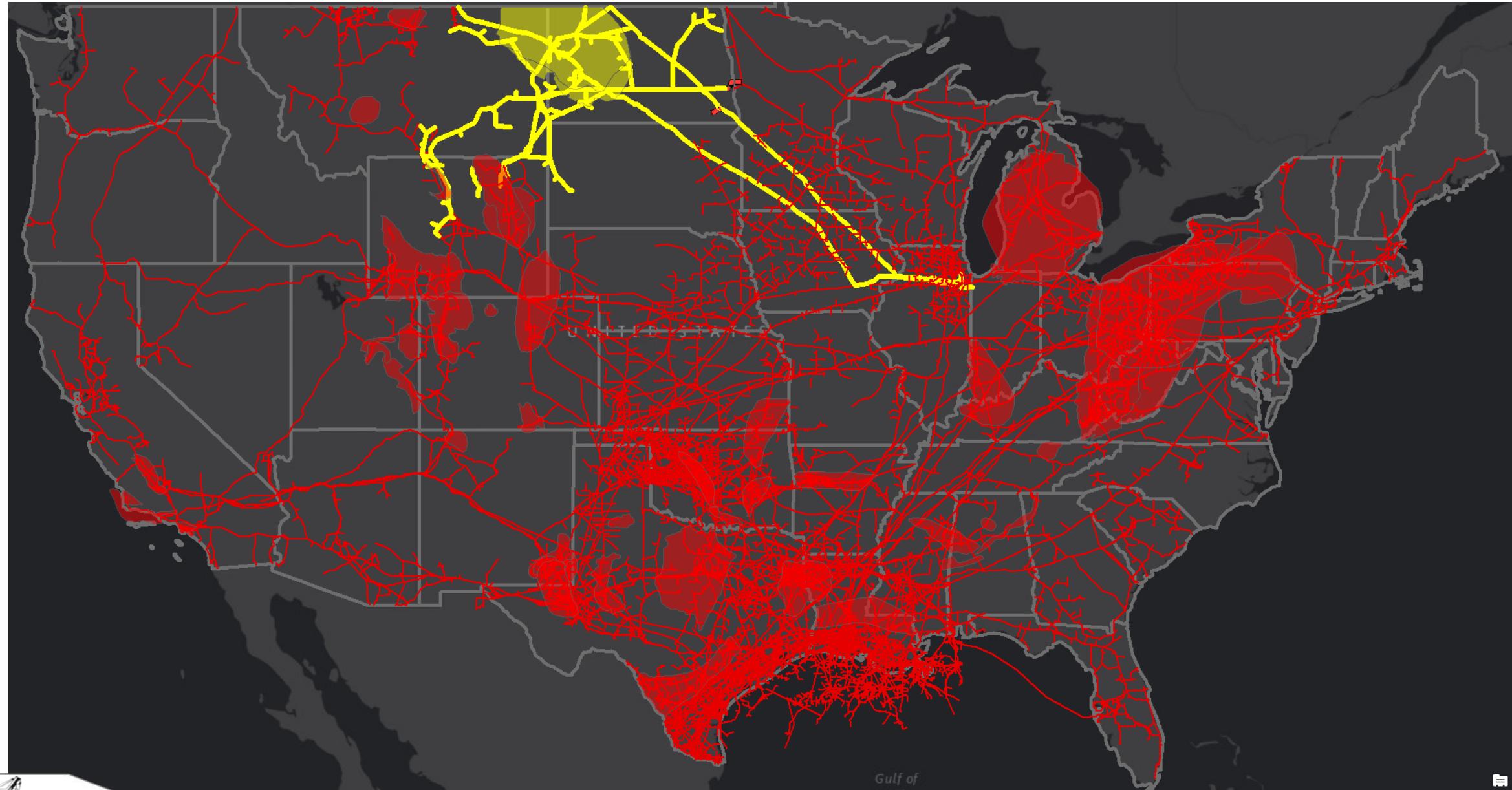
EIA Oil Price Outlook (January 2026)



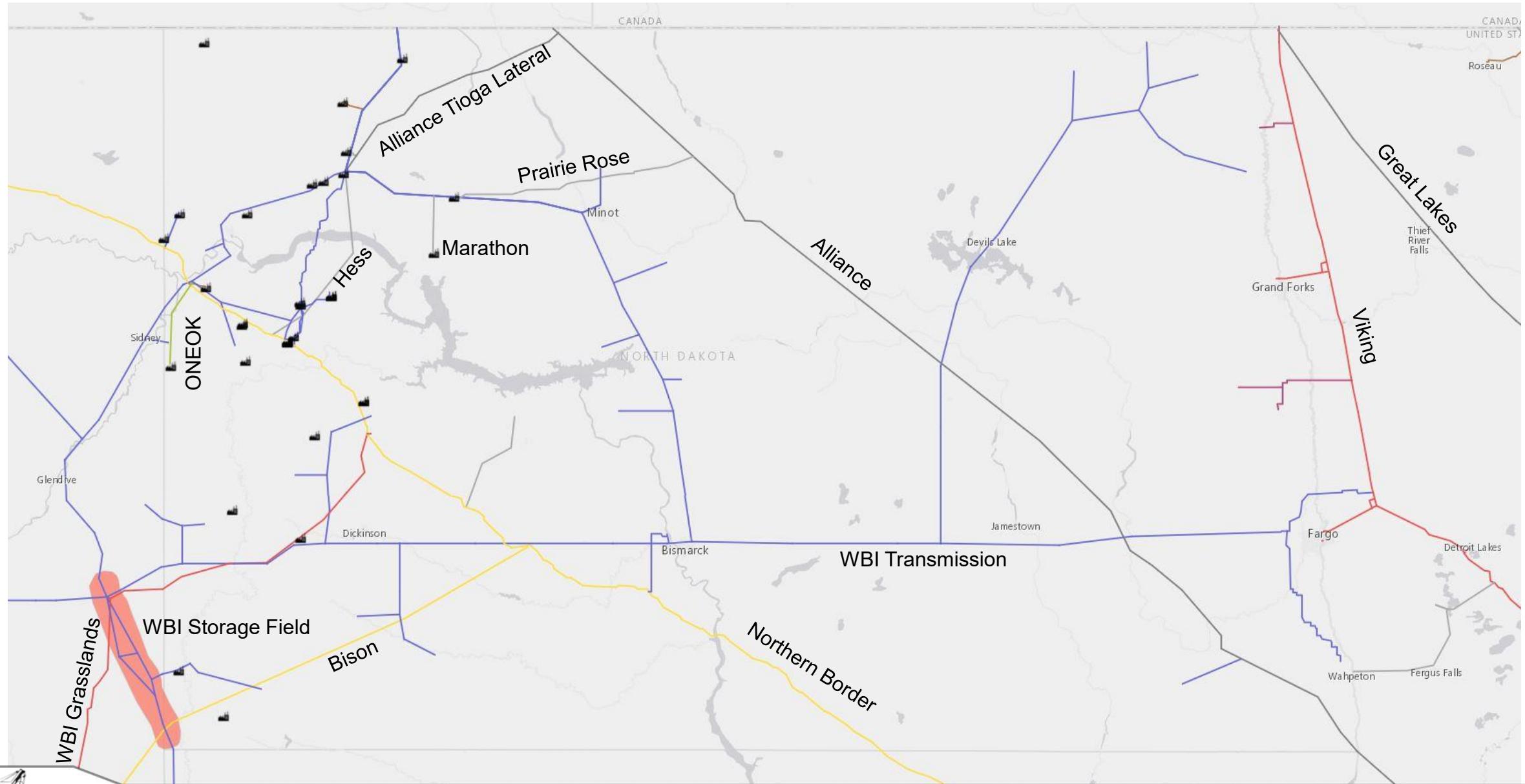
North Dakota Gas Processing Outlook



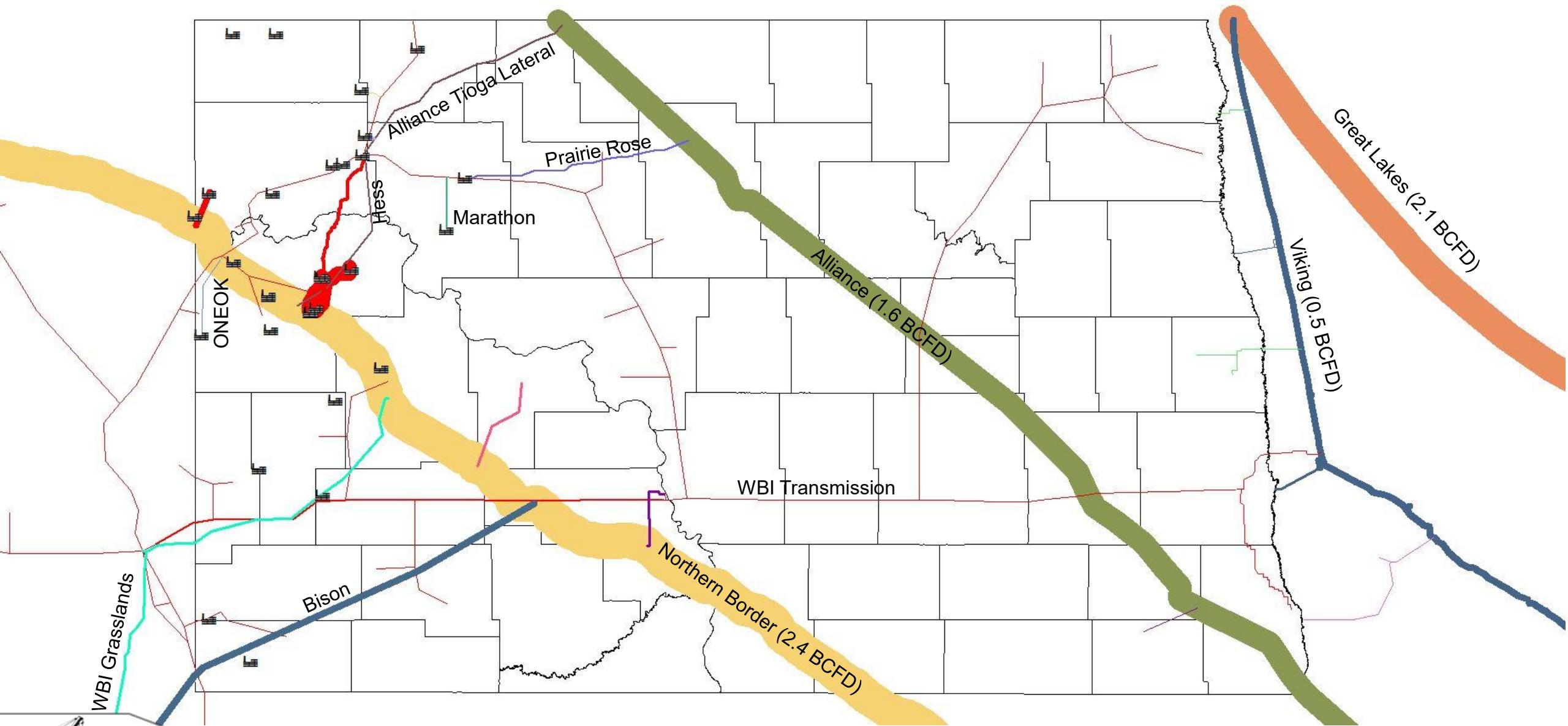
Bakken Natural Gas Infrastructure



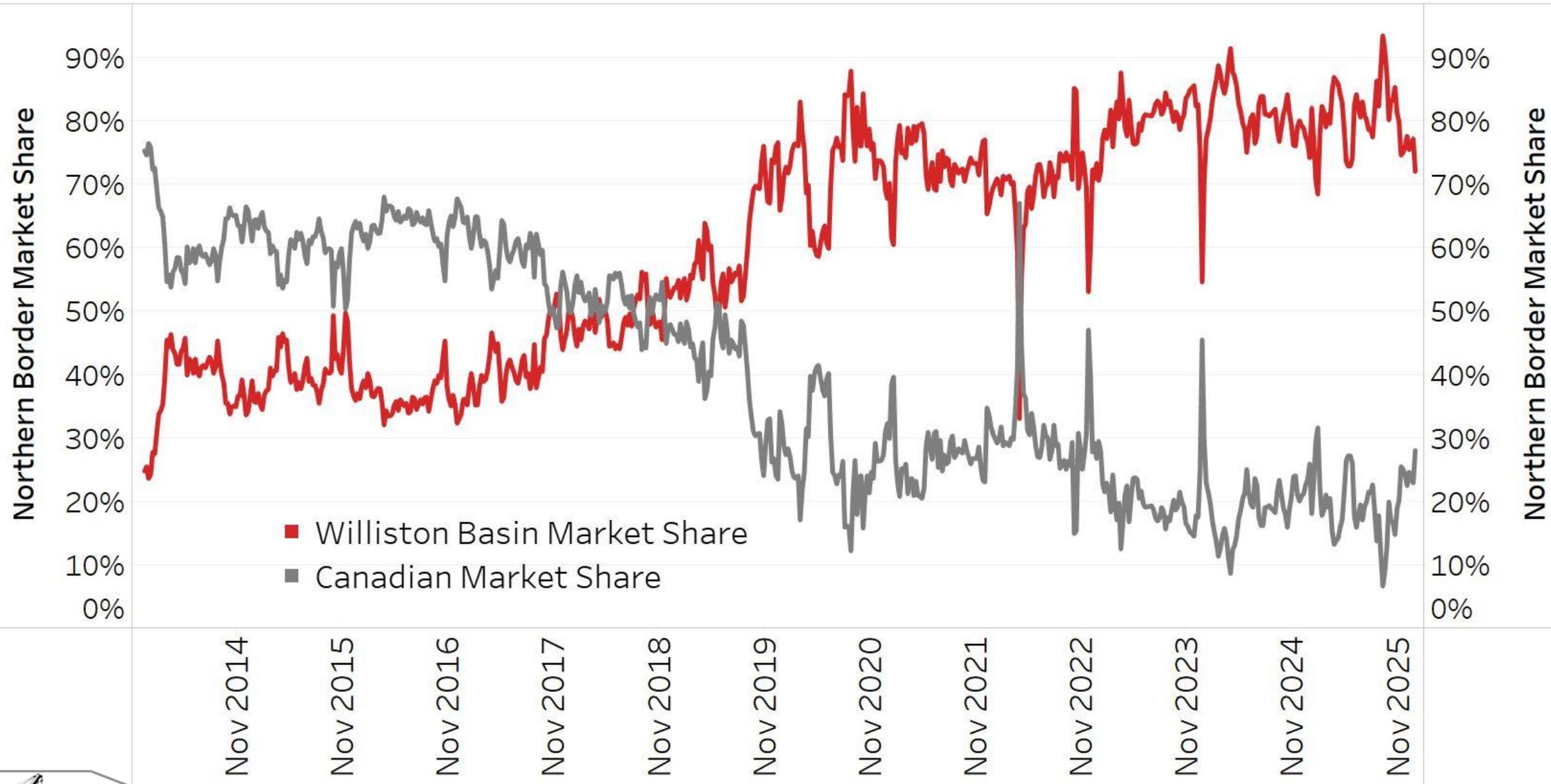
Major Residue Gas Pipeline Infrastructure



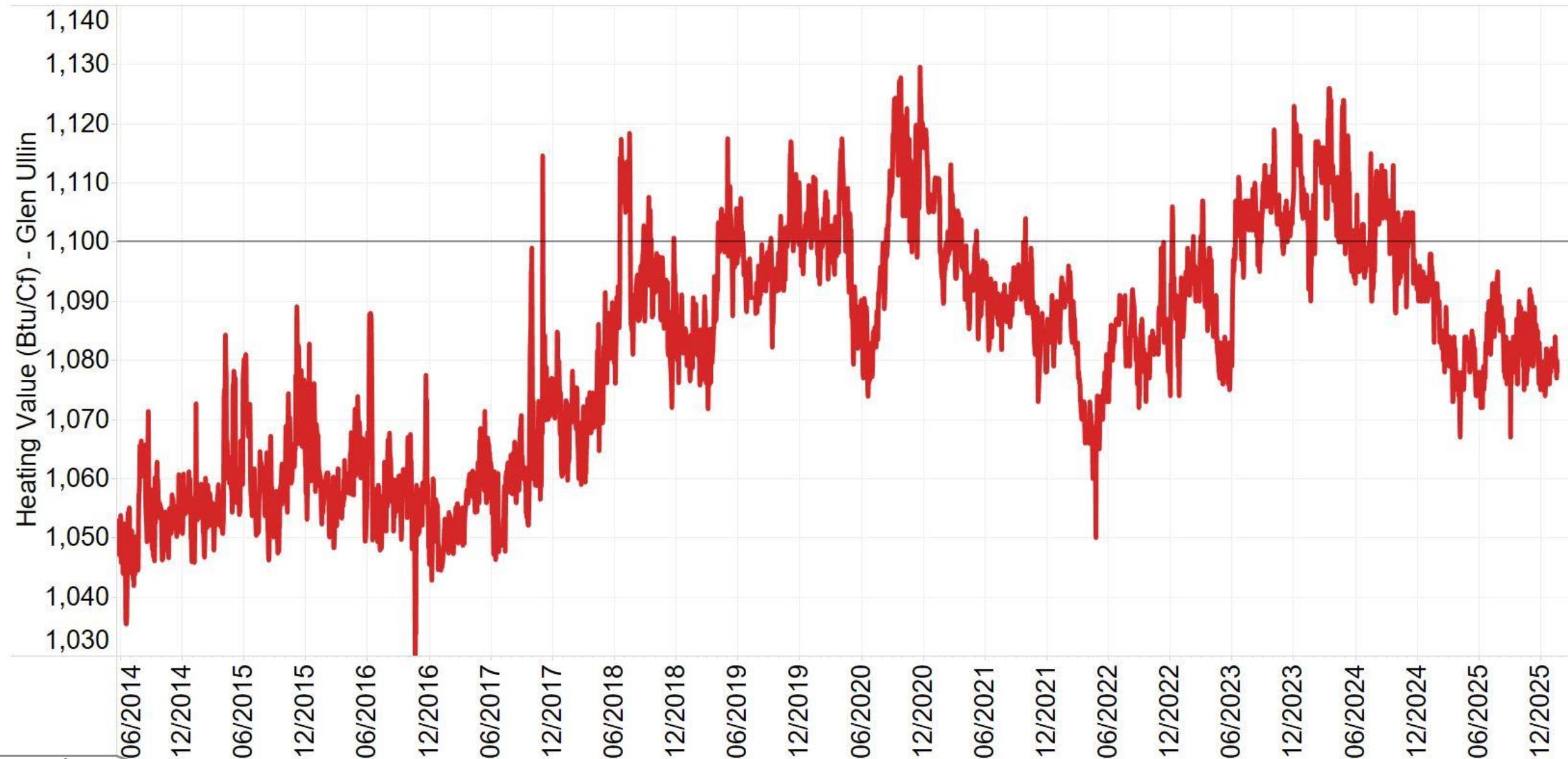
Residue Gas Pipeline Capacity Visualization



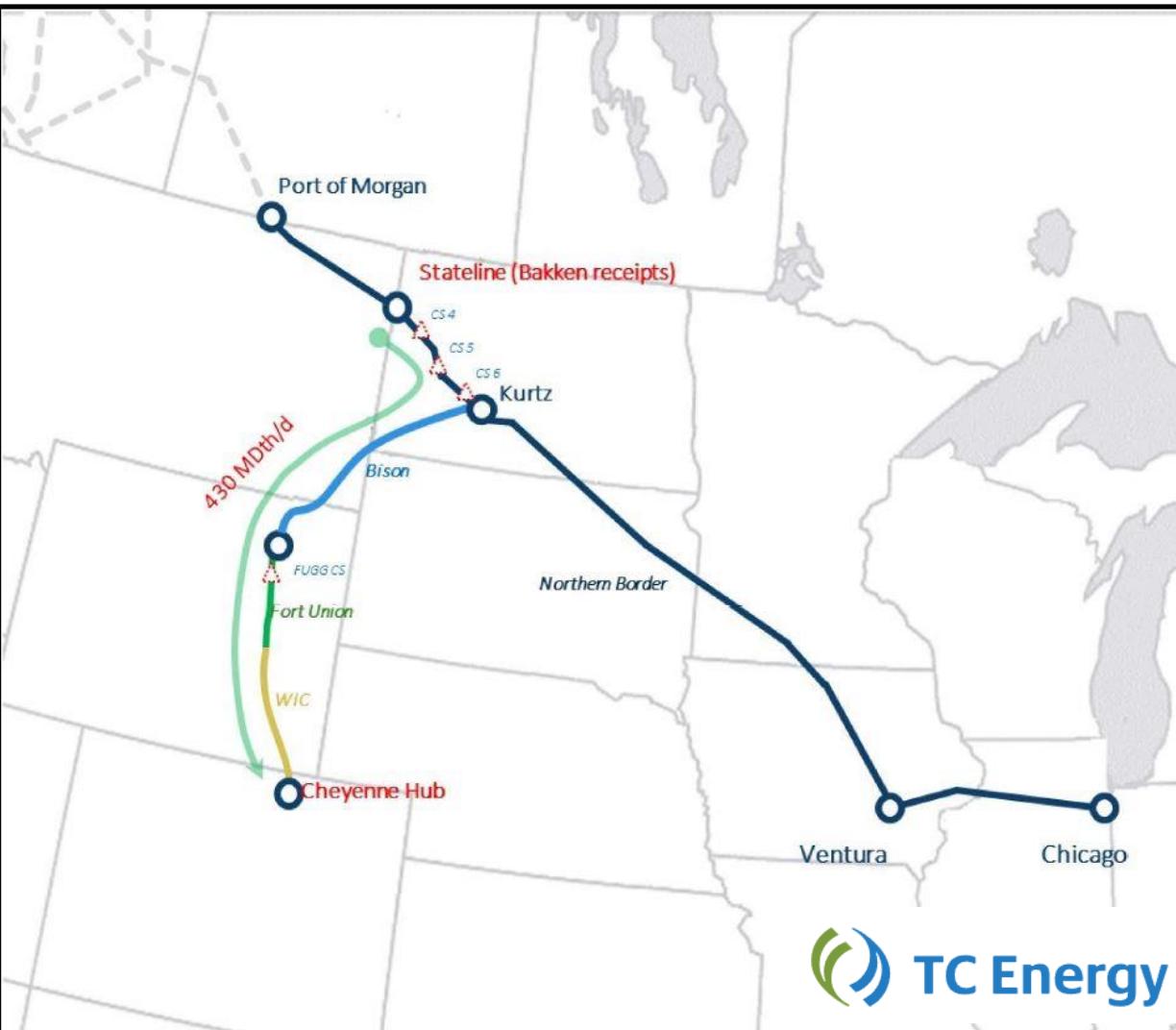
Northern Border Pipeline Market Share



Northern Border BTU at Glen Ullin, ND



TC Energy / Kinder Morgan: Bakken xPress Project



Project Highlights

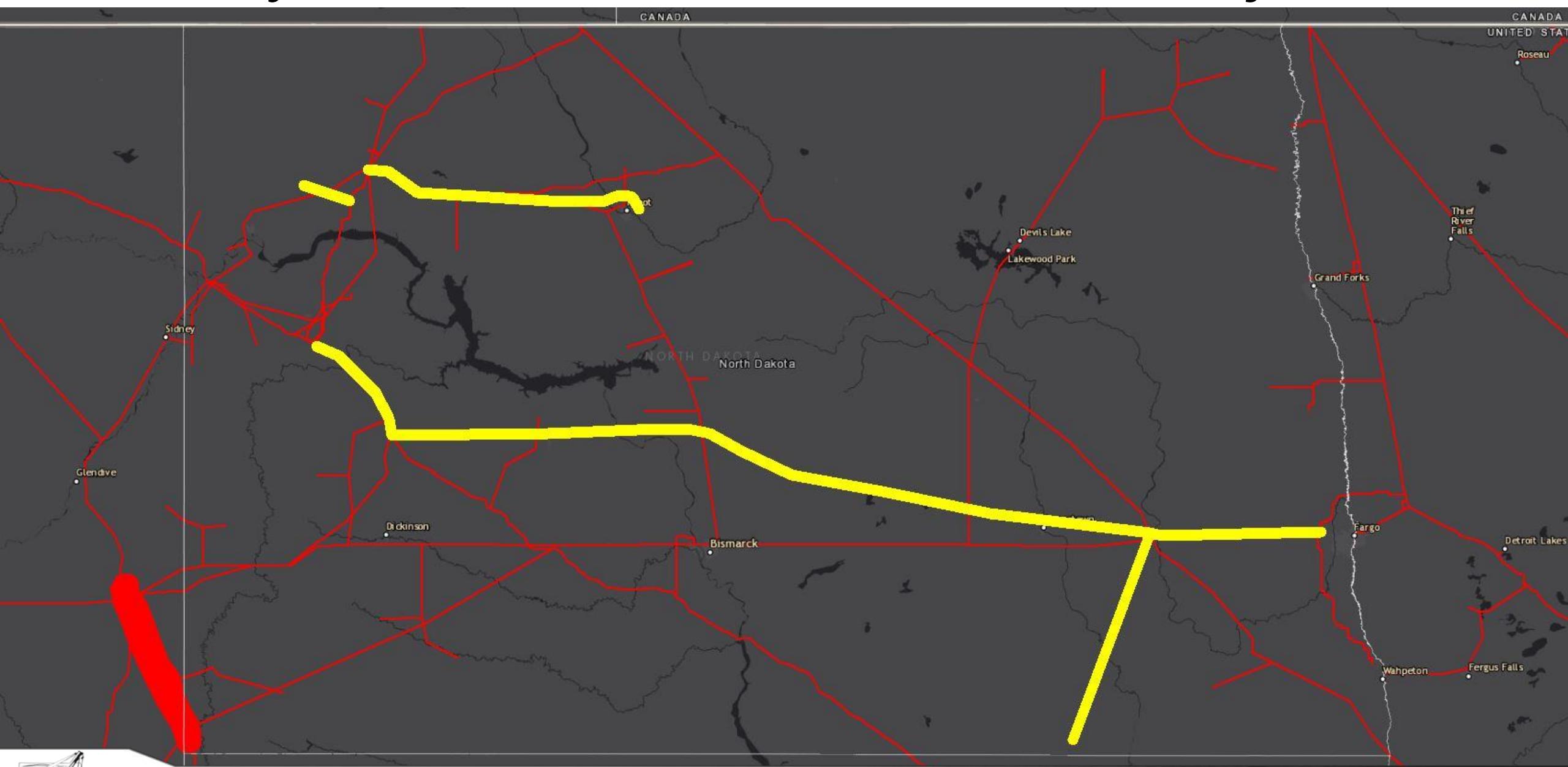
- Non-binding open season April 4 - May 6, 2022
- Binding Open Season: June 1-30, 2023
- Three compressor upgrades in North Dakota
- Reverse the idle Bison Pipeline (30" – 302 Mile)
- Capacity 300,000 Dth/Day (430,000 Offered)
- **May 2026** targeted in-service date
- Fort Union Gas Gathering and Wyoming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

Proposed Rates

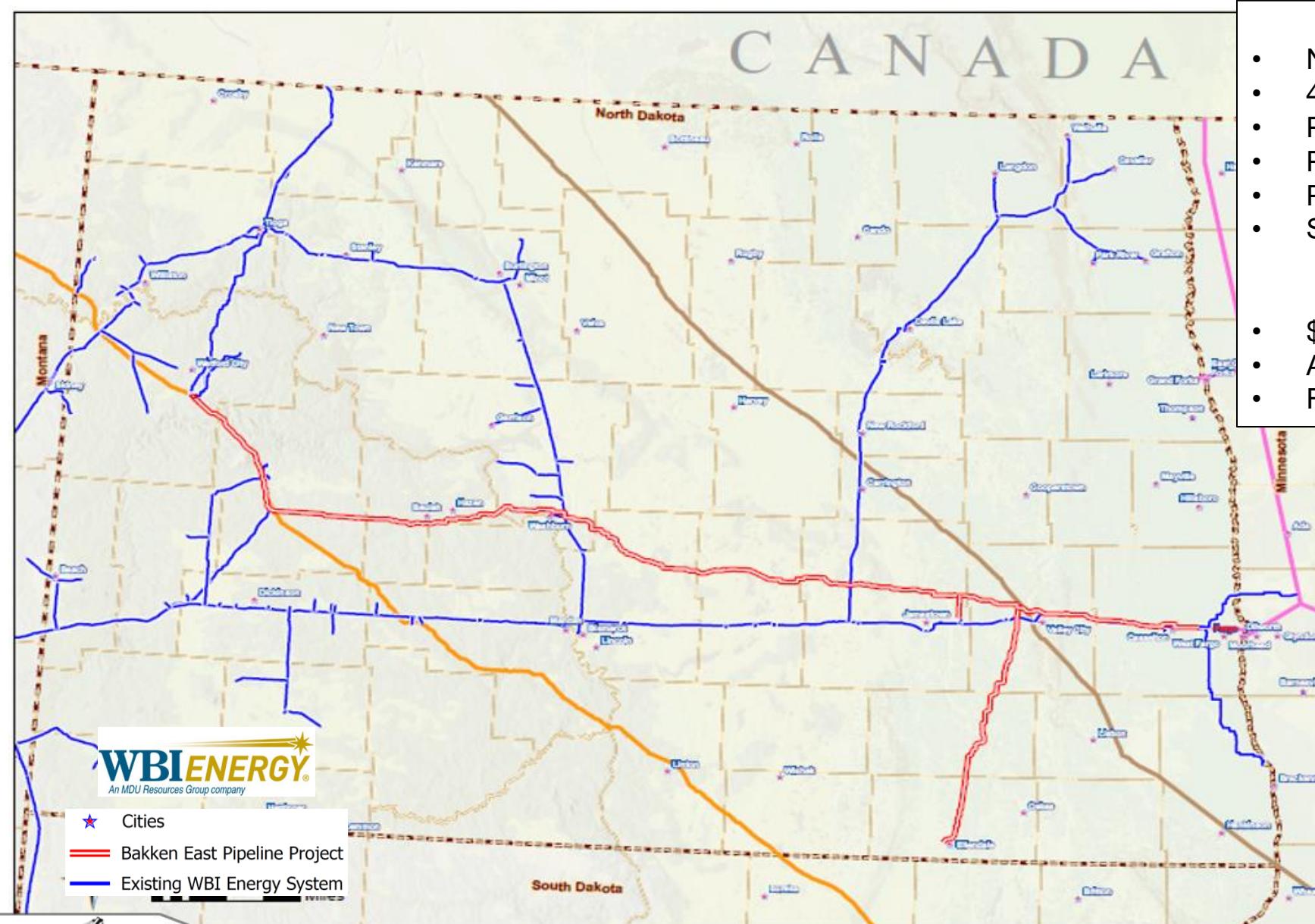
- NBPL/Bison \$0.45/Dth + Fuel/Elec to WIC/FUG Interconnect
- WIC/FUG to Cheyenne \$0.30/Dth + Fuel/Elec
- Anchor Shipper Minimum: 50,000 Dth/Day



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

Intensity Infrastructure Partners Proposed Pipeline



Phase 1 Project Highlights

- Non-binding open season Feb 3 – Mar 7, 2025
- 136 Miles: 36" Pipe
- Proposed Capacity 1,100,000 Dth/Day
- July 2029 targeted in-service
- Seeking commitments 10yrs or Longer

Phase 1 Estimated Rates

- Sub-\$0.40/Dth + Fuel/Electric/Commodity
- Anchor Shipper Minimum: 100,000 Dth/Day
- Foundation Shipper Minimum: 250,000 Dth/Day

Phase 2 Project Highlights

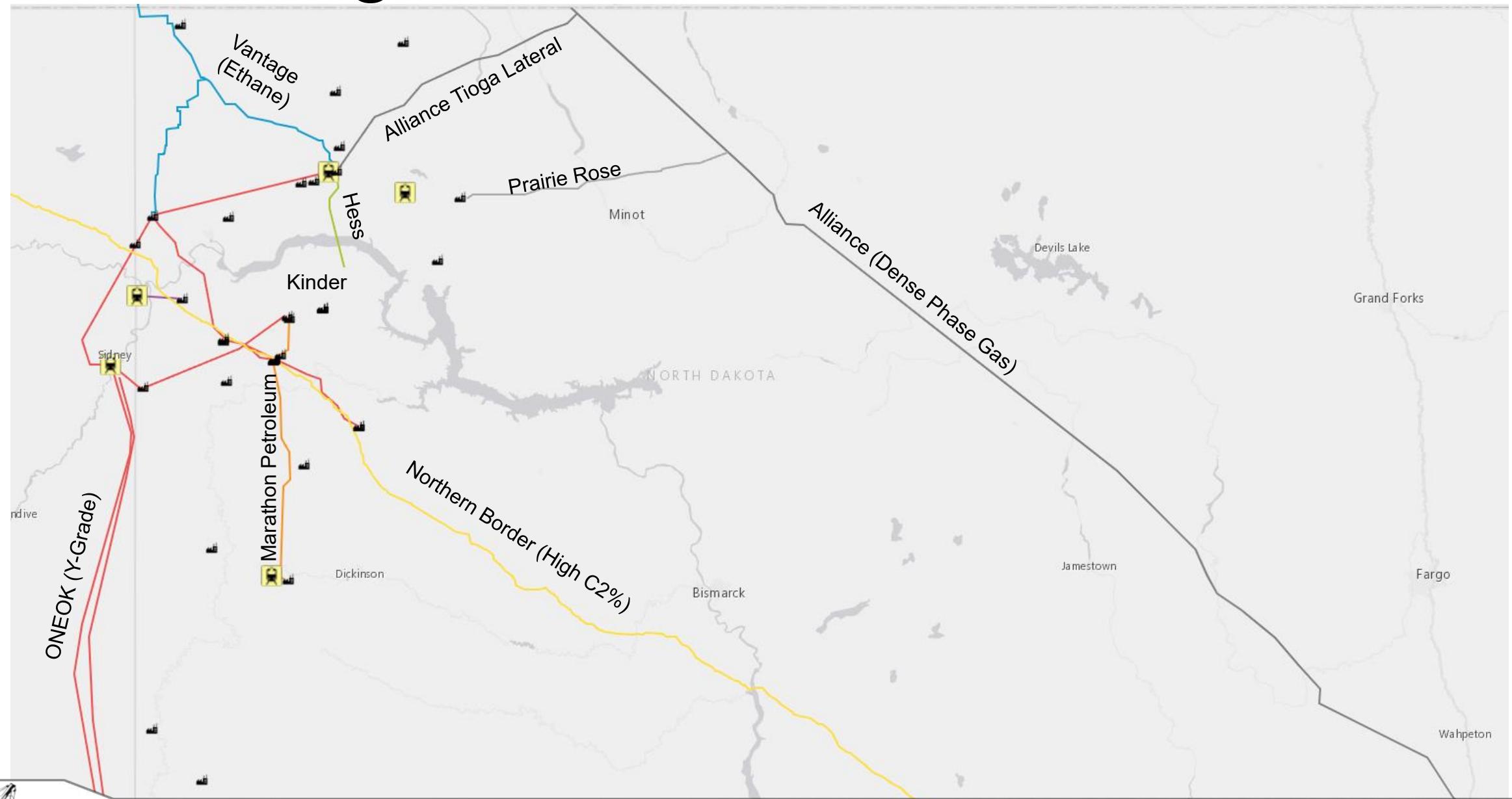
- Non-binding open season Apr 17 – May 23, 2025
- 208 Miles: 30" Pipe
- Proposed Capacity 430,000 Dth/Day
- January 2030 targeted in-service
- Seeking commitments 10yrs or Longer

Phase 2 Estimated Rates

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



Regional NGL Infrastructure



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