

Pipeline Authority Monthly Update

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March 19, 2026

US Williston Basin Oil Production - 2026

MONTH	ND	Eastern MT*	SD	TOTAL
January	1,124,766			
February				
March				
April				
May				
June				
July				
August				
September				
October				
November				
December				

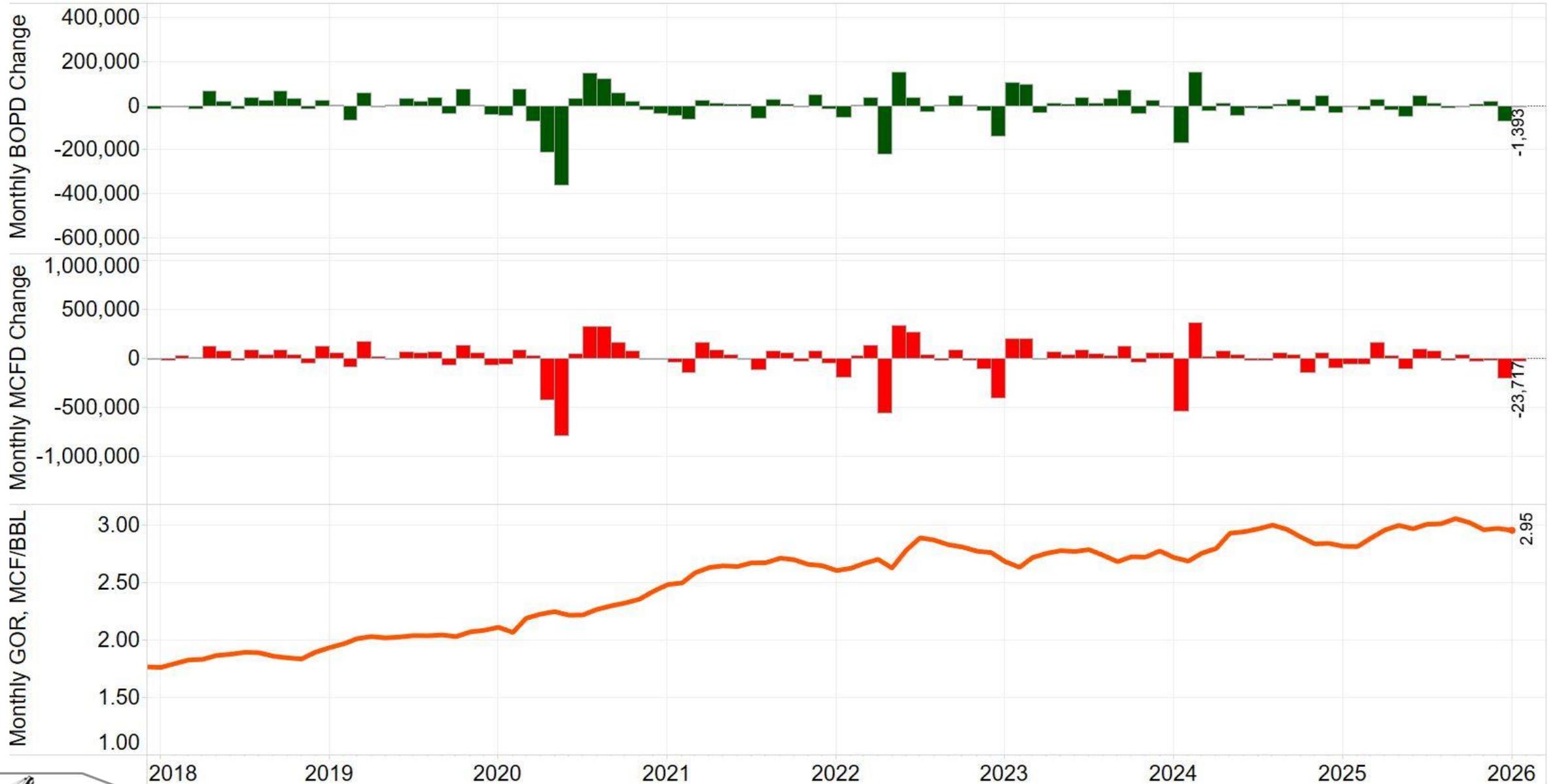


US Williston Basin Oil Production - 2025

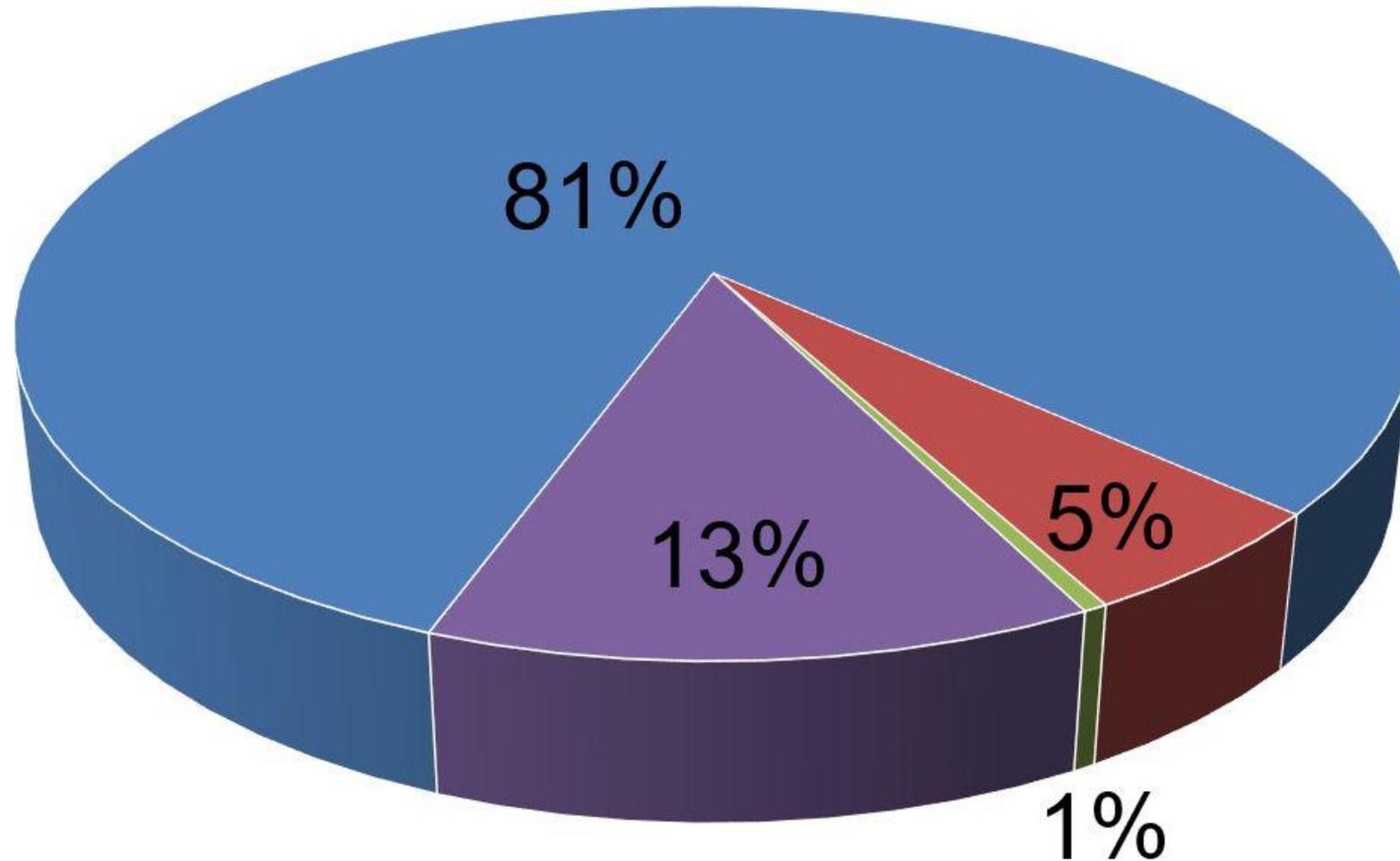
MONTH	ND	Eastern MT*	SD	TOTAL
January	1,183,077	75,045	2,281	1,260,403
February	1,165,229	71,713	2,282	1,239,224
March	1,195,030	76,008	2,272	1,273,310
April	1,175,943	74,904	2,294	1,253,141
May	1,127,014	79,643	2,295	1,208,952
June	1,172,718	79,742	2,145	1,254,605
July	1,184,124	80,475	2,271	1,266,870
August	1,175,328	76,585	2,218	1,254,131
September	1,172,197	81,674	2,253	1,256,124
October	1,178,172	85,201	2,221	1,265,594
November	1,198,143	81,323	2,213	1,281,679
December	1,126,159	78,873	2,123	1,207,154



North Dakota Monthly Production Change



Estimated Williston Basin Oil Transportation



■ Pipeline Export

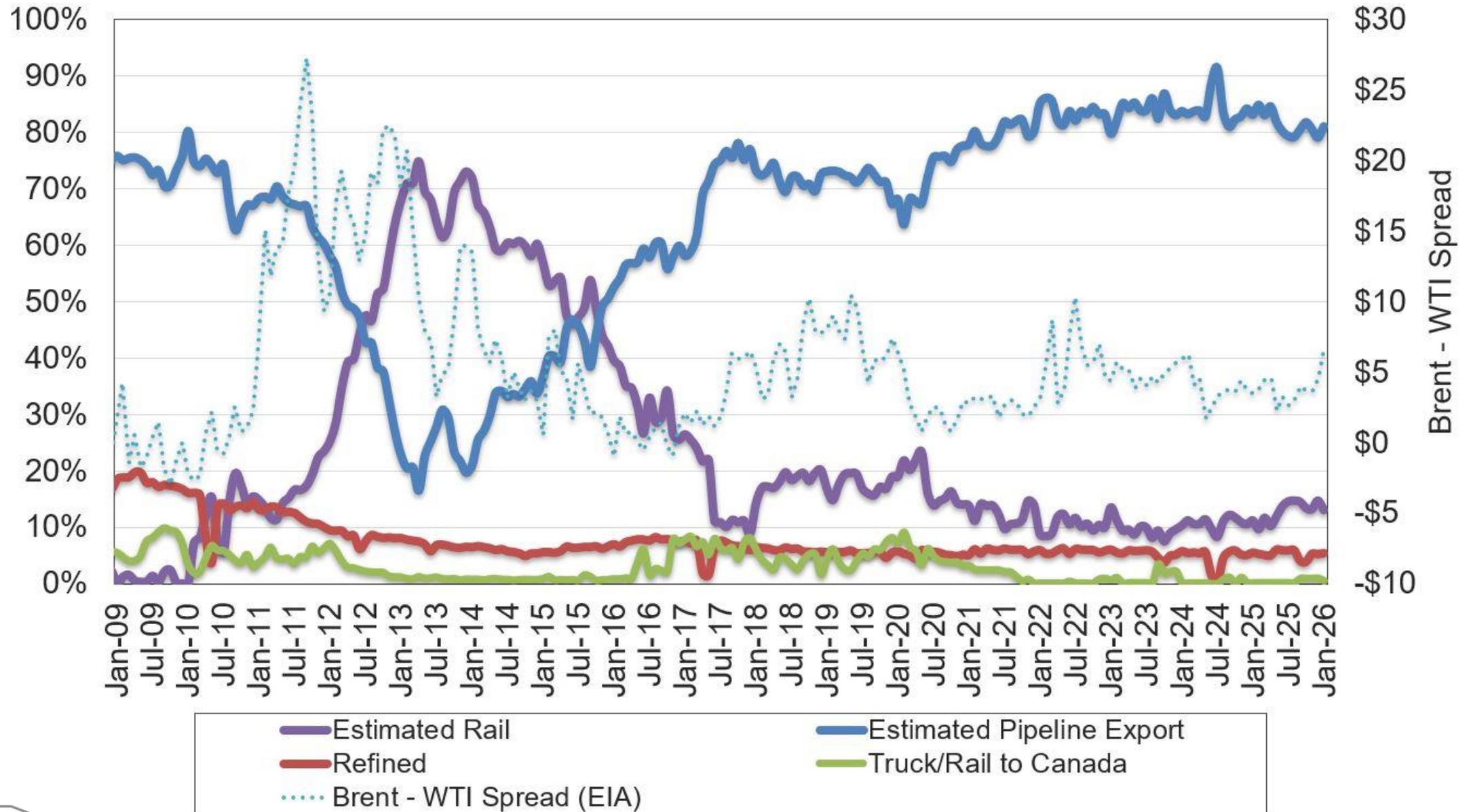
■ Refined

■ Truck/Rail to Canada

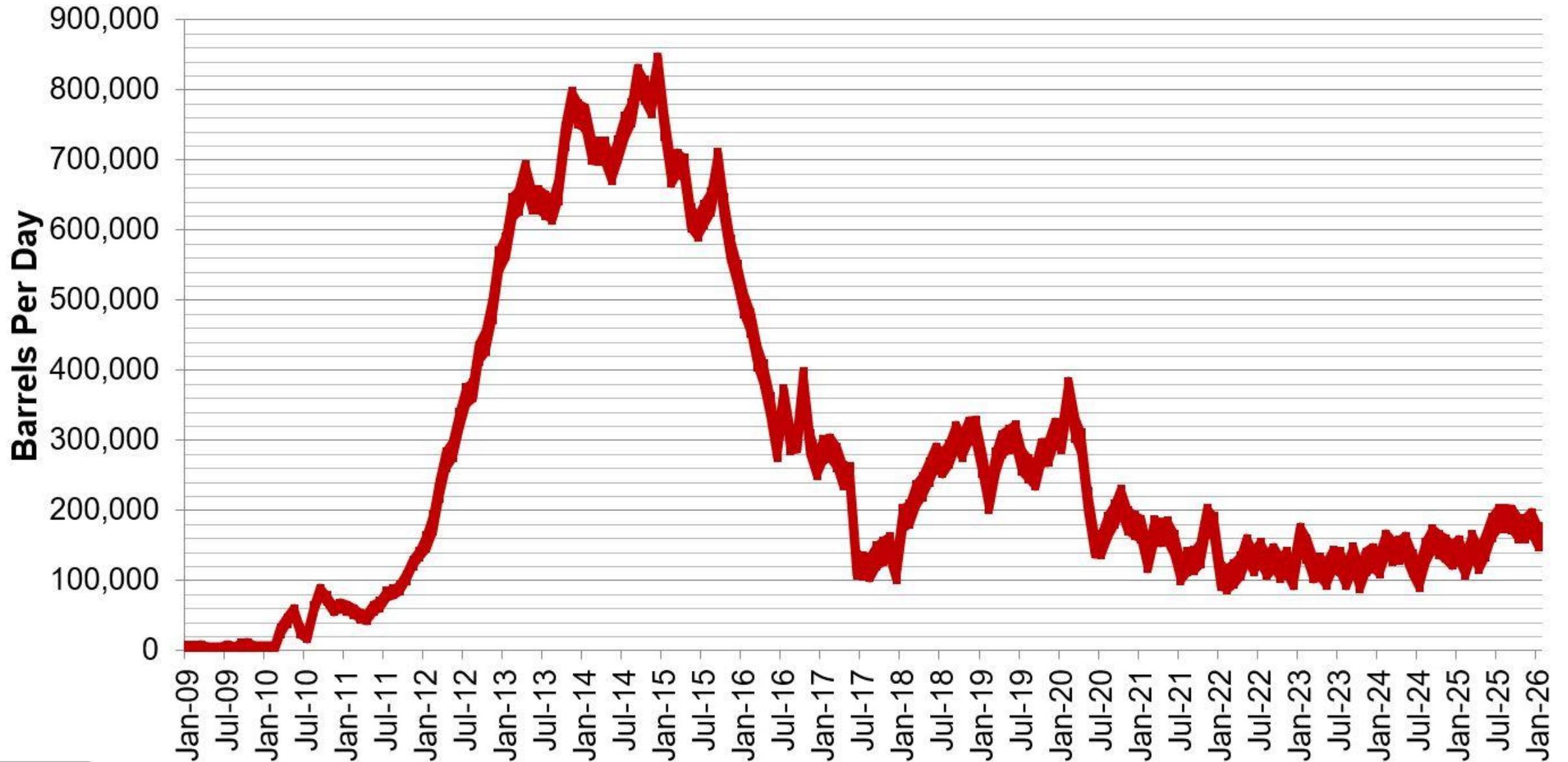
■ Estimated Rail



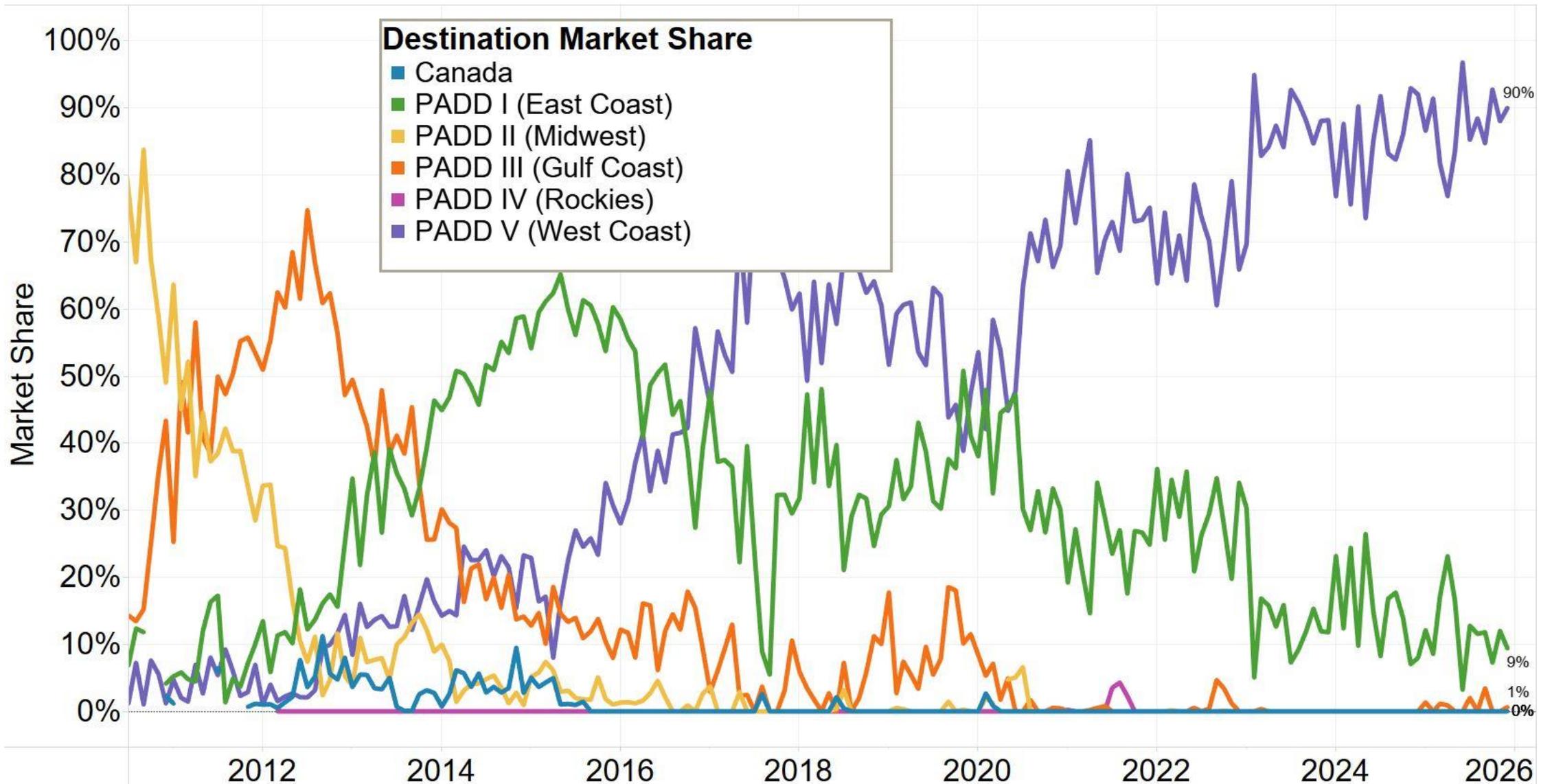
Estimated Williston Basin Oil Transportation



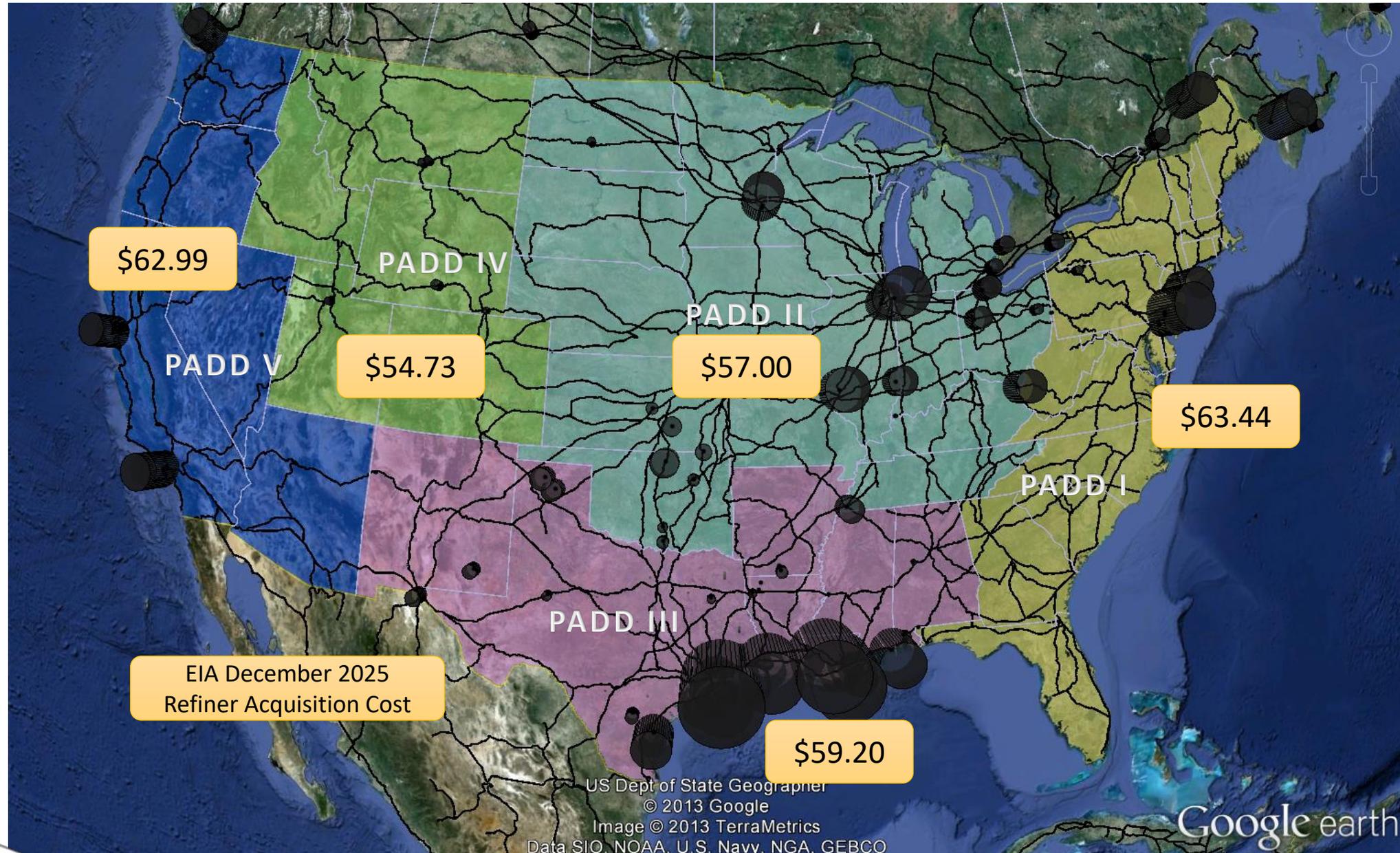
Estimated ND Rail Export Volumes



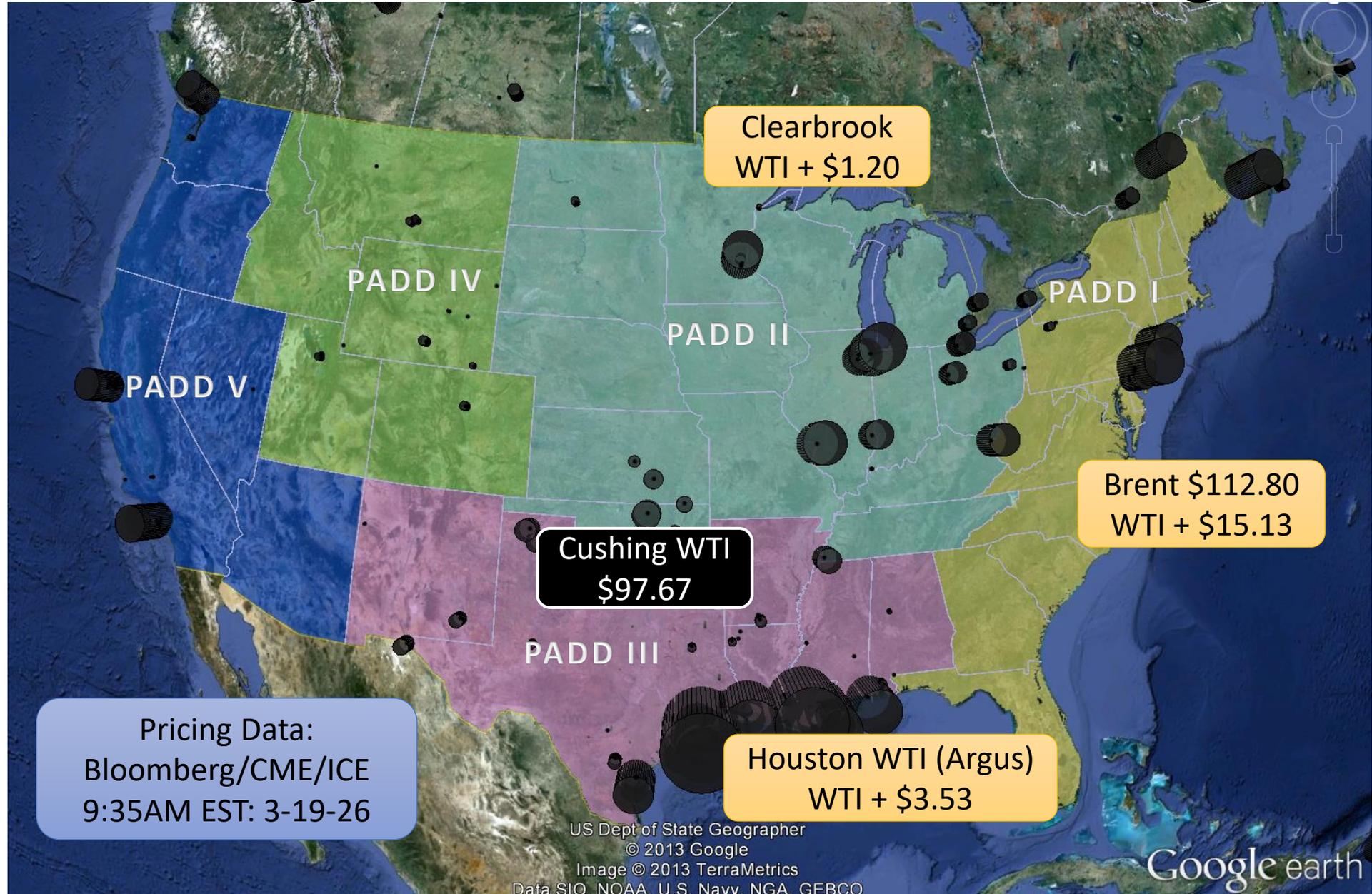
Rail Destinations Market Share (Dec. 2025)



Major Rail Lines and Refineries



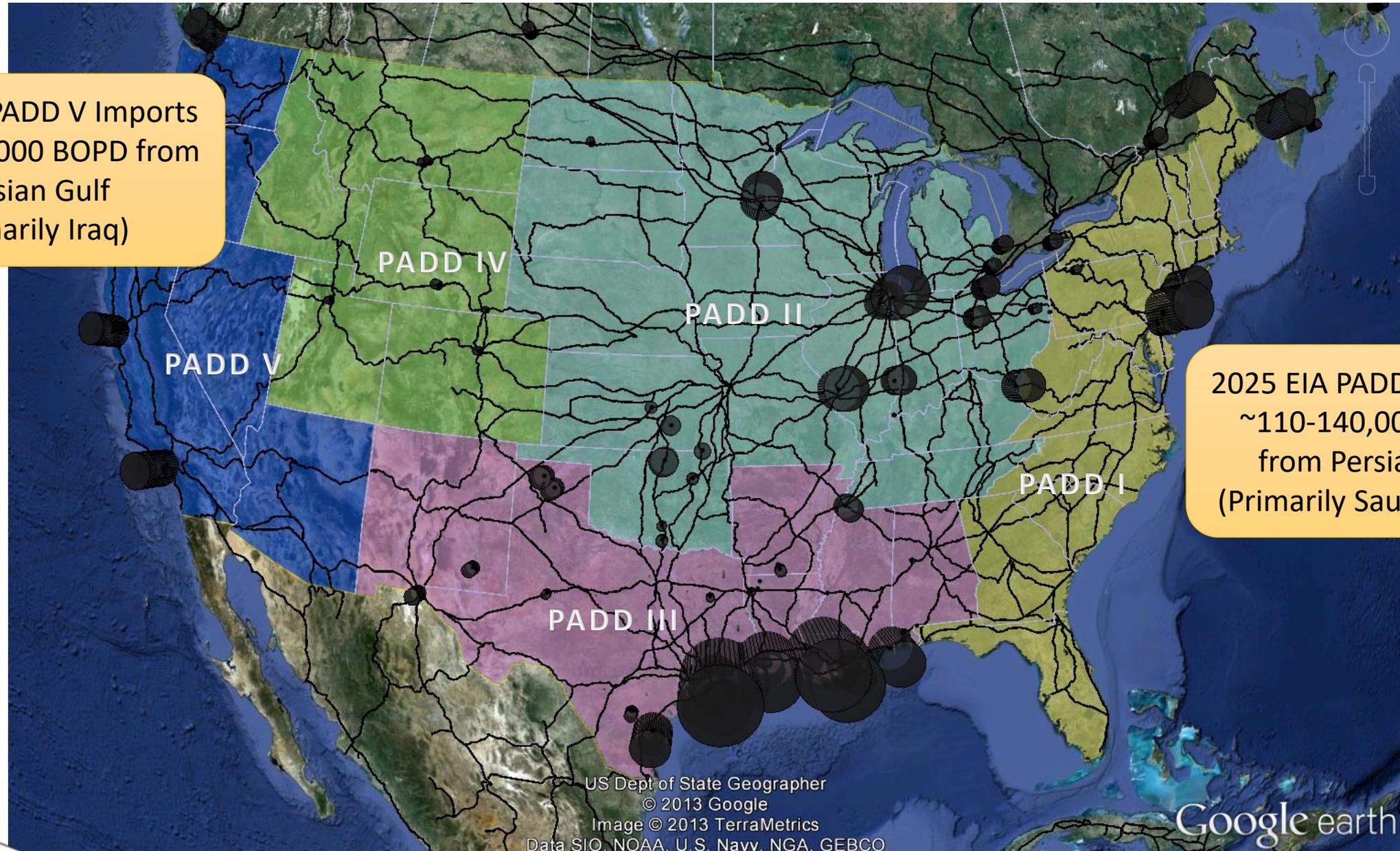
Major Pricing Benchmarks & Refining Centers



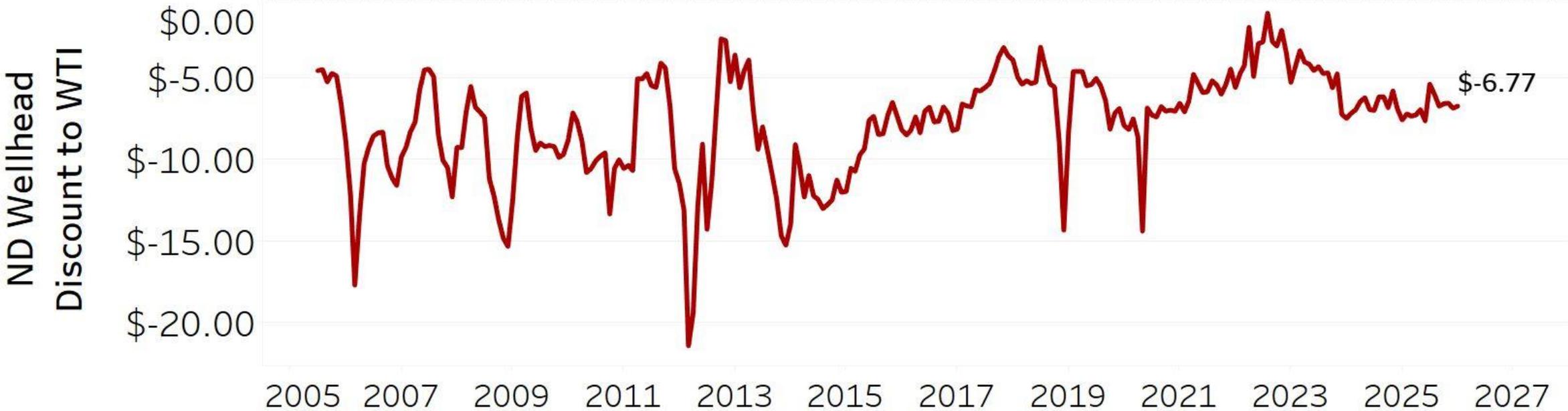
Major Rail Lines and Refineries

2025 EIA PADD V Imports
~200-250,000 BOPD from
Persian Gulf
(Primarily Iraq)

2025 EIA PADD I Imports
~110-140,000 BOPD
from Persian Gulf
(Primarily Saudi Arabia)



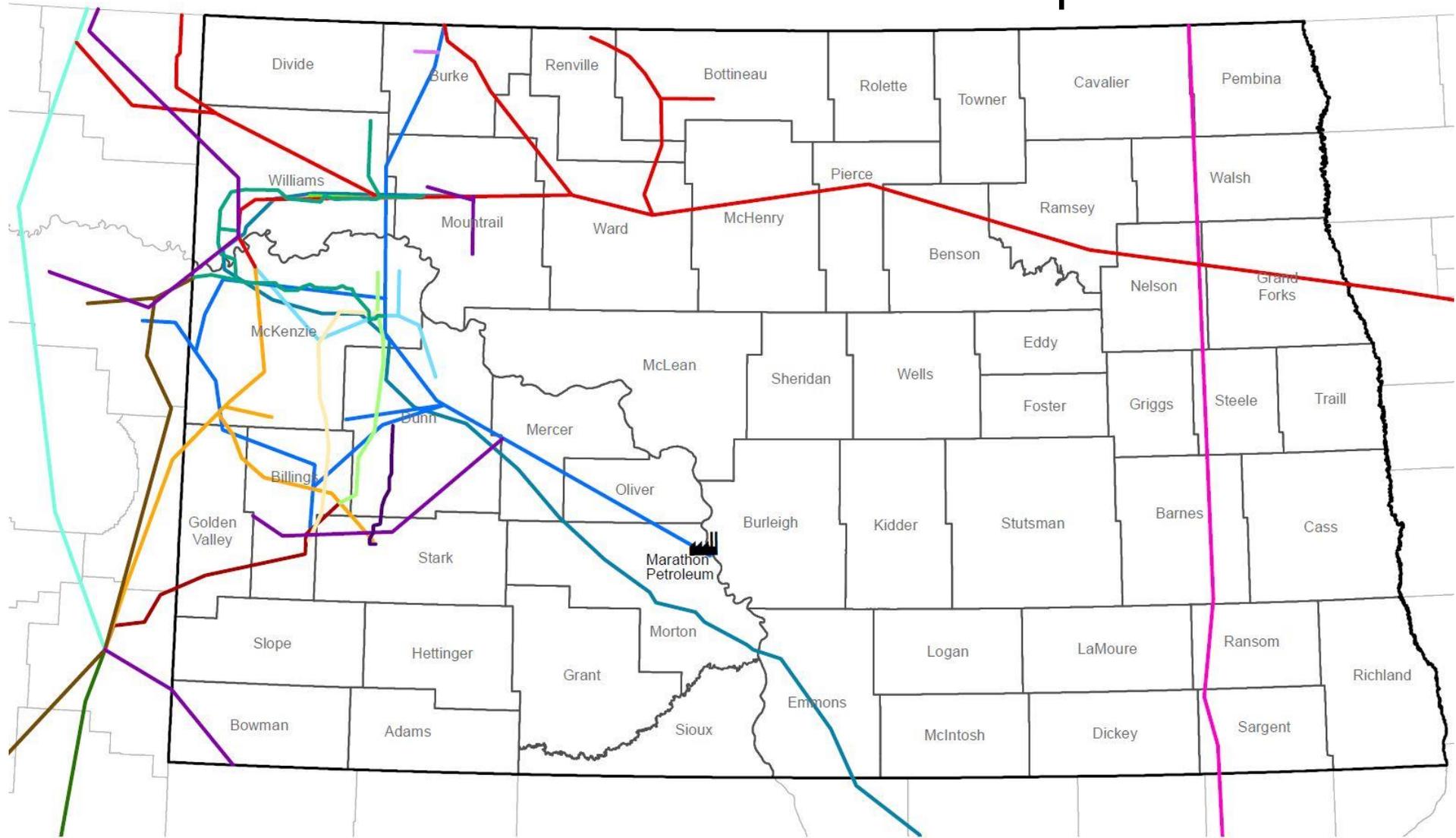
Average North Dakota Oil “Discount” to WTI



Last Five Years Annual Average



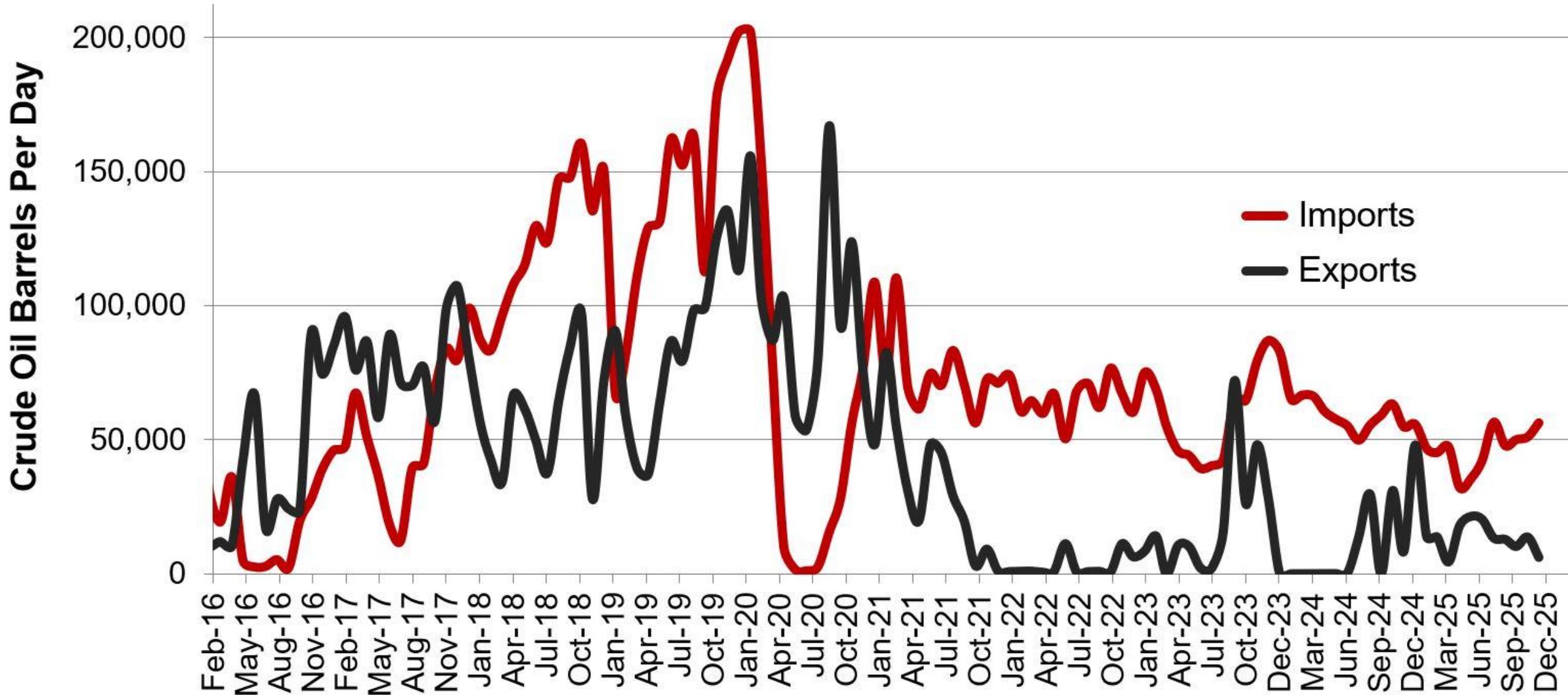
North Dakota Oil Transmission Pipelines



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



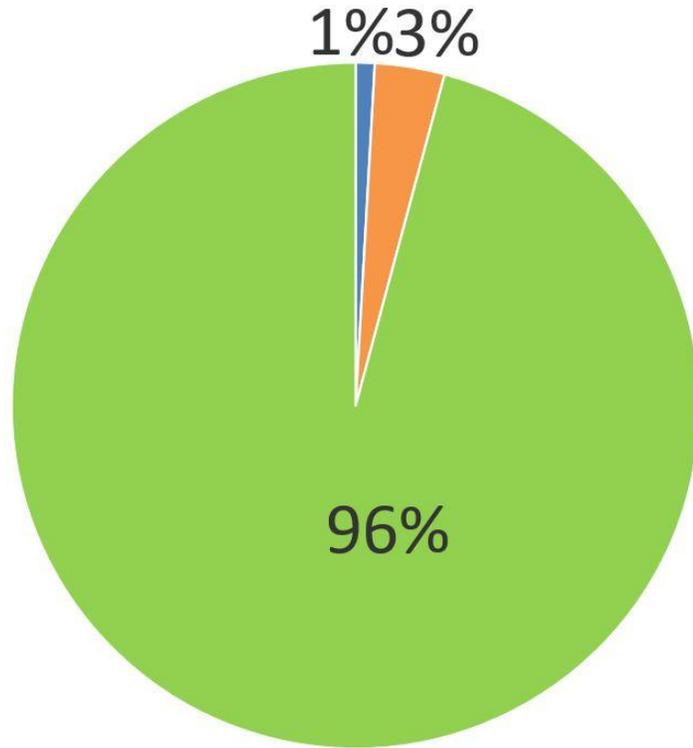
Williston Basin Imports and Exports with Canada



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.

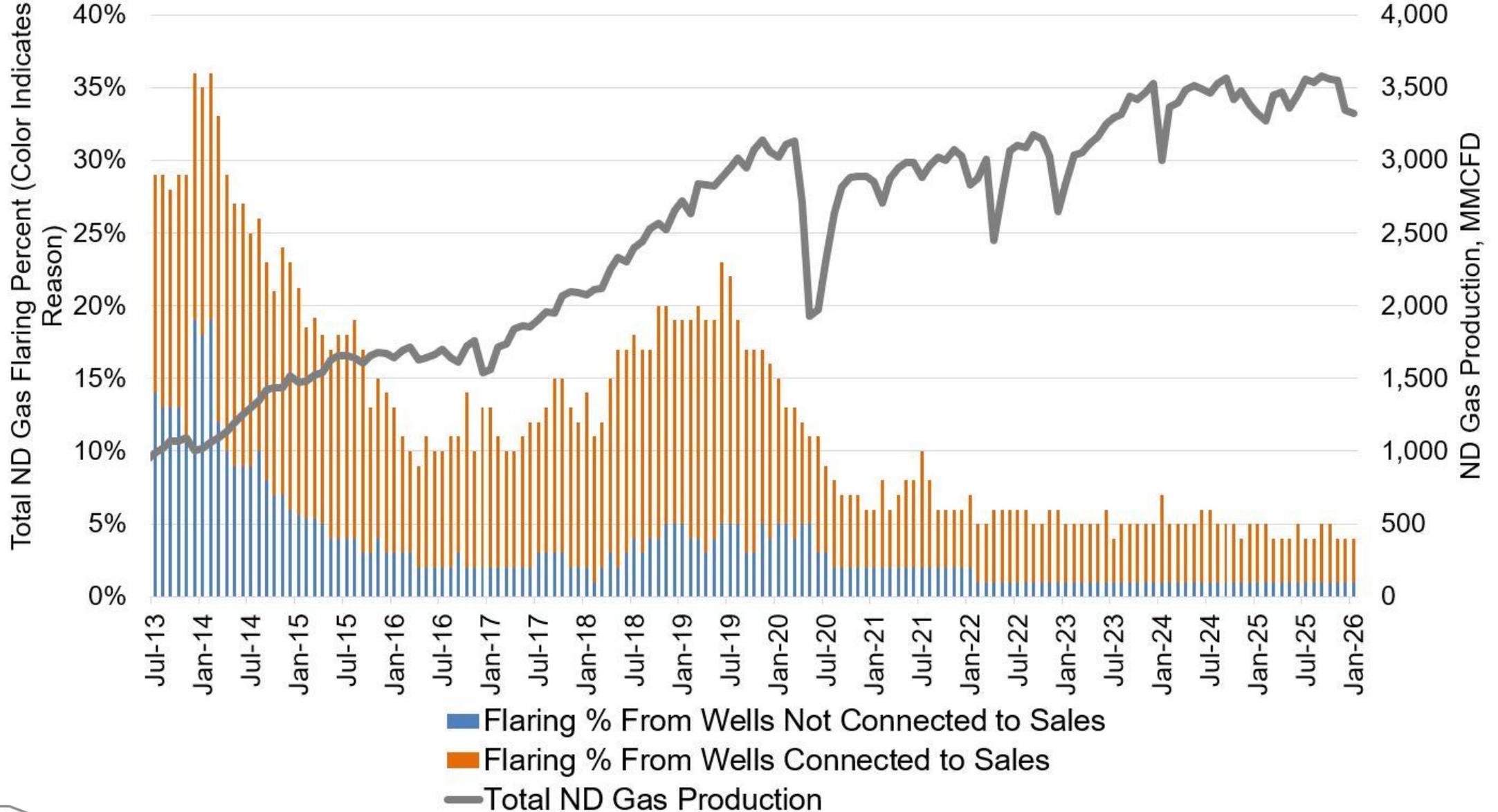
Simple Terms

Blue – Lack of pipelines
Orange – Challenges on existing infrastructure

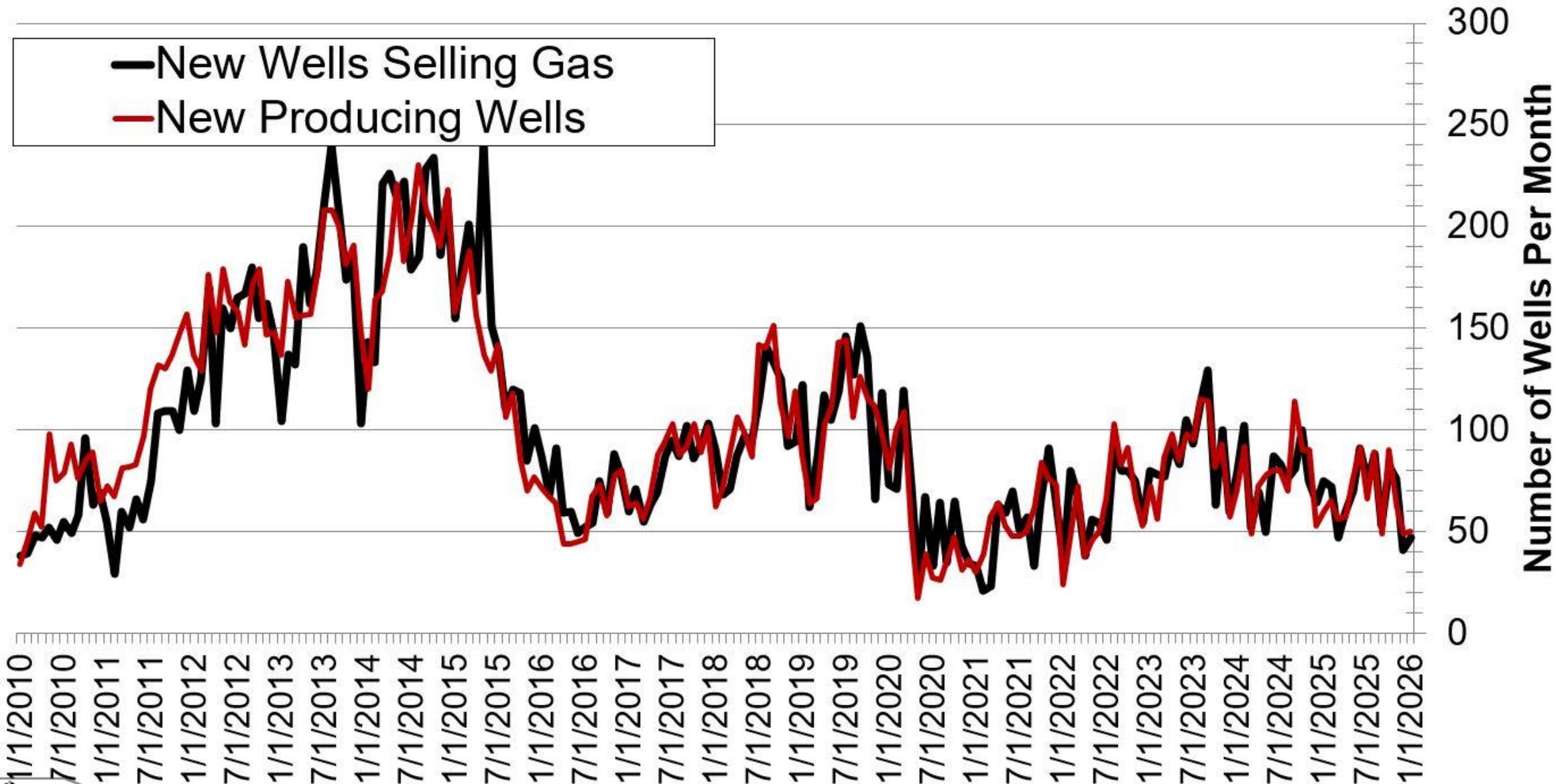
Jan. 2026 Data – Non-Confidential Wells



Solving the Flaring Challenge

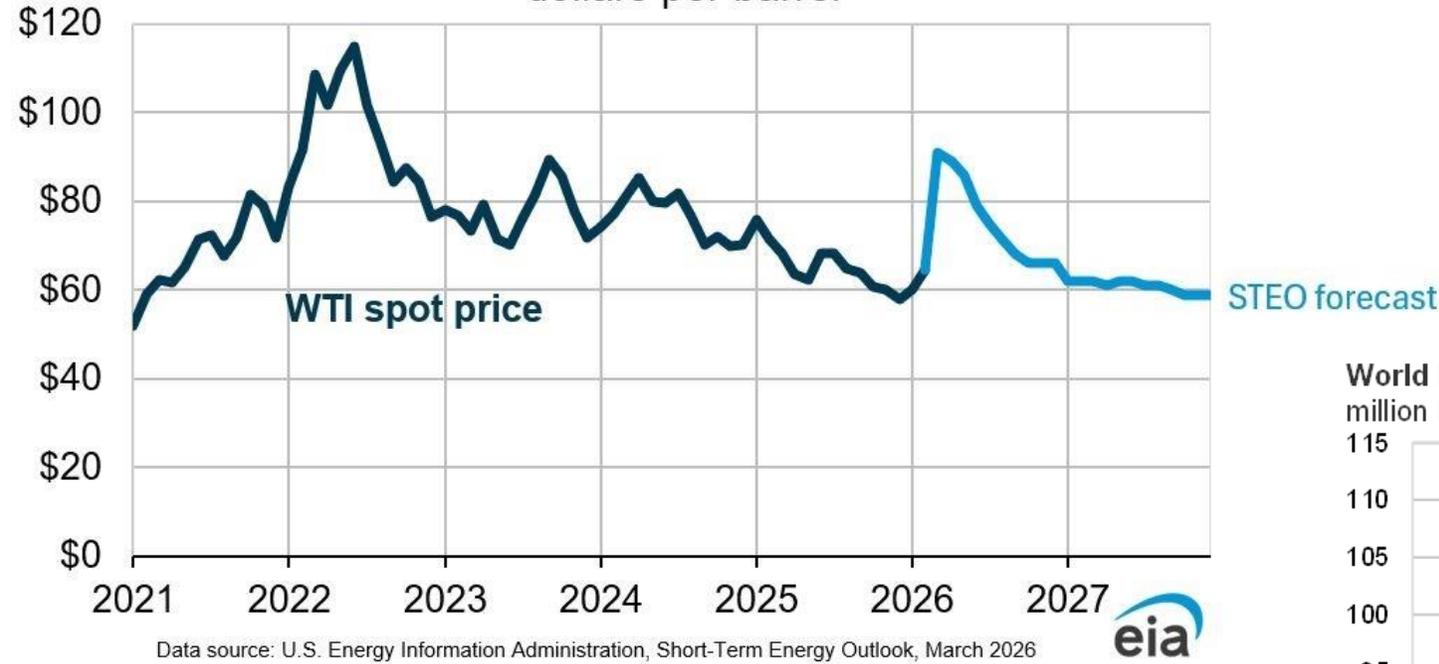


Solving the Flaring Challenge

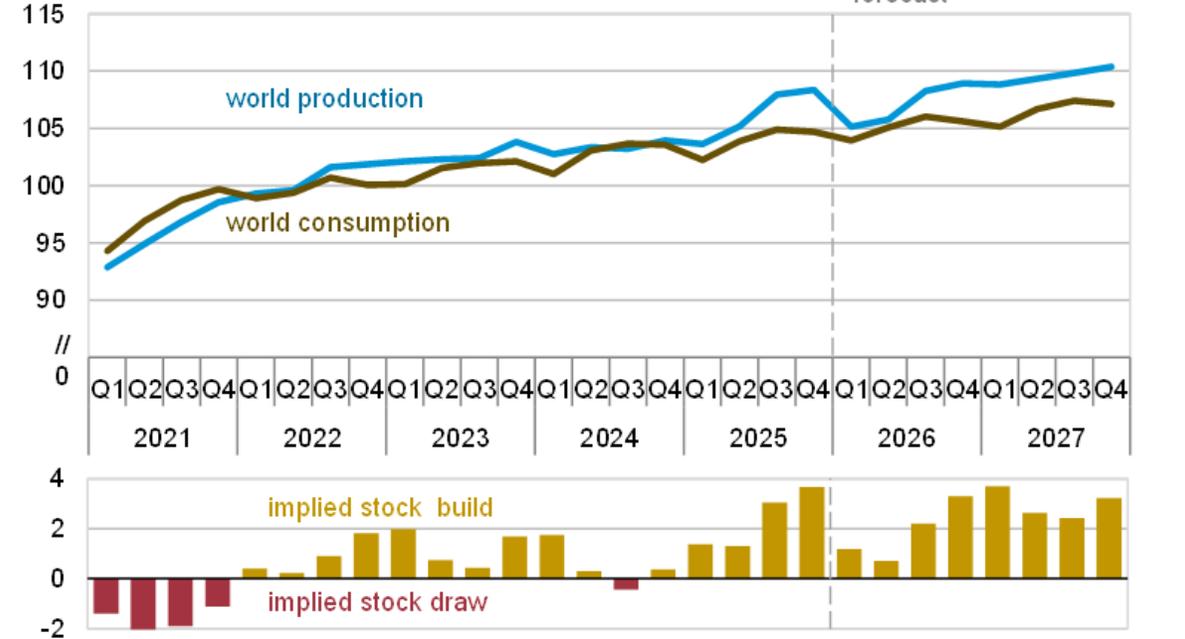


EIA Oil Price Outlook (March 2026)

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



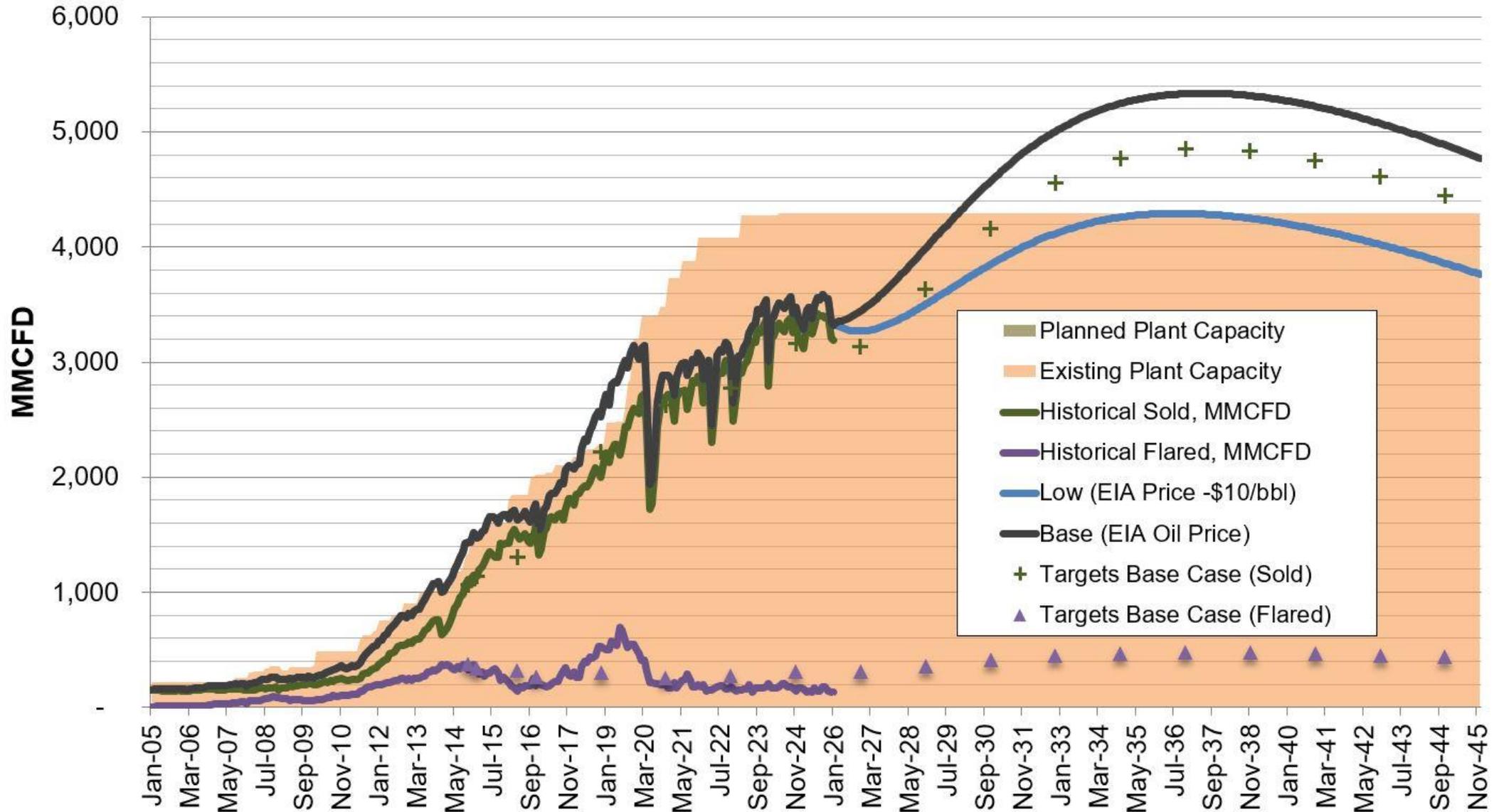
World liquid fuels production and consumption balance
million barrels per day



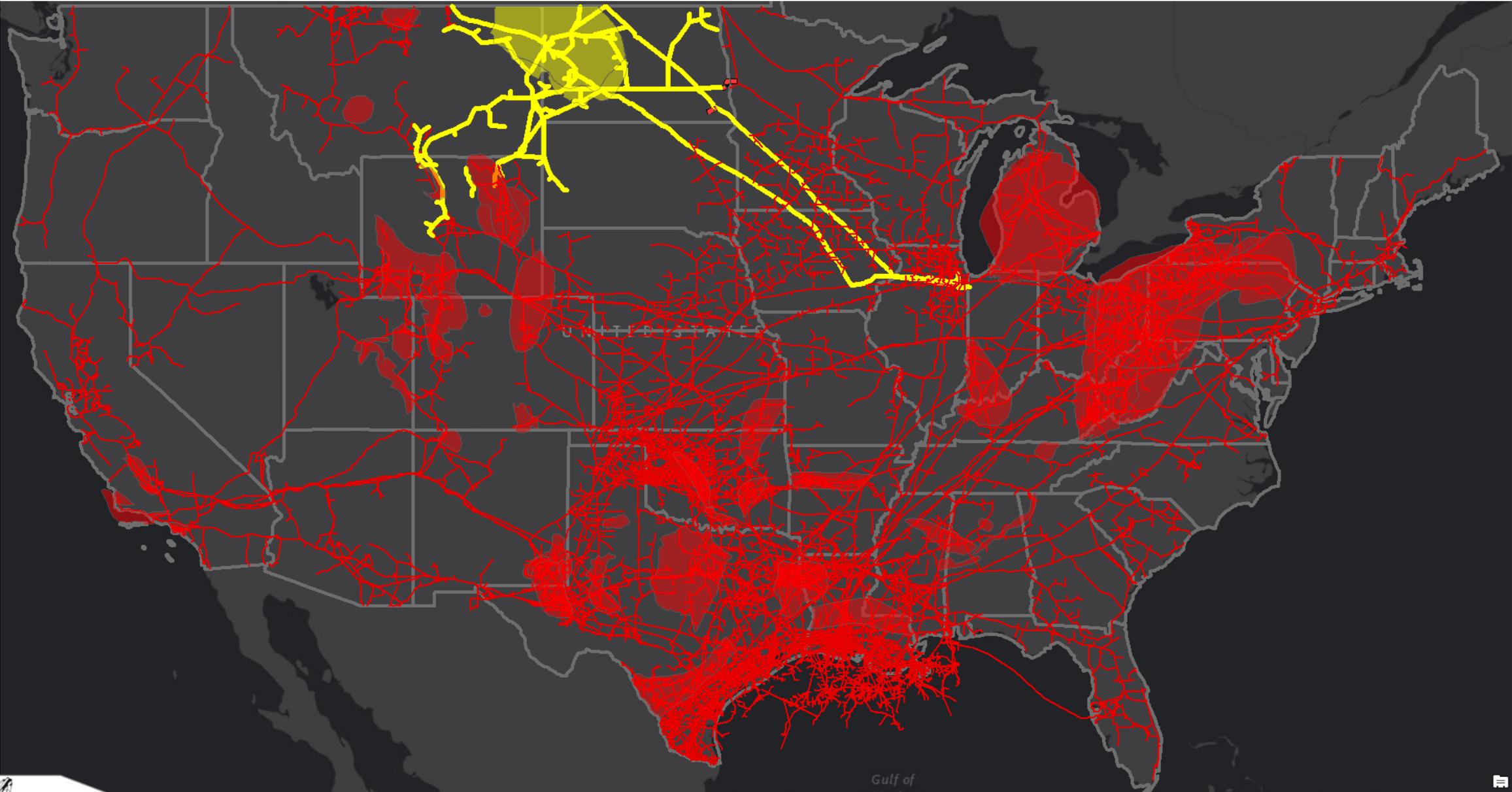
Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, March 2026



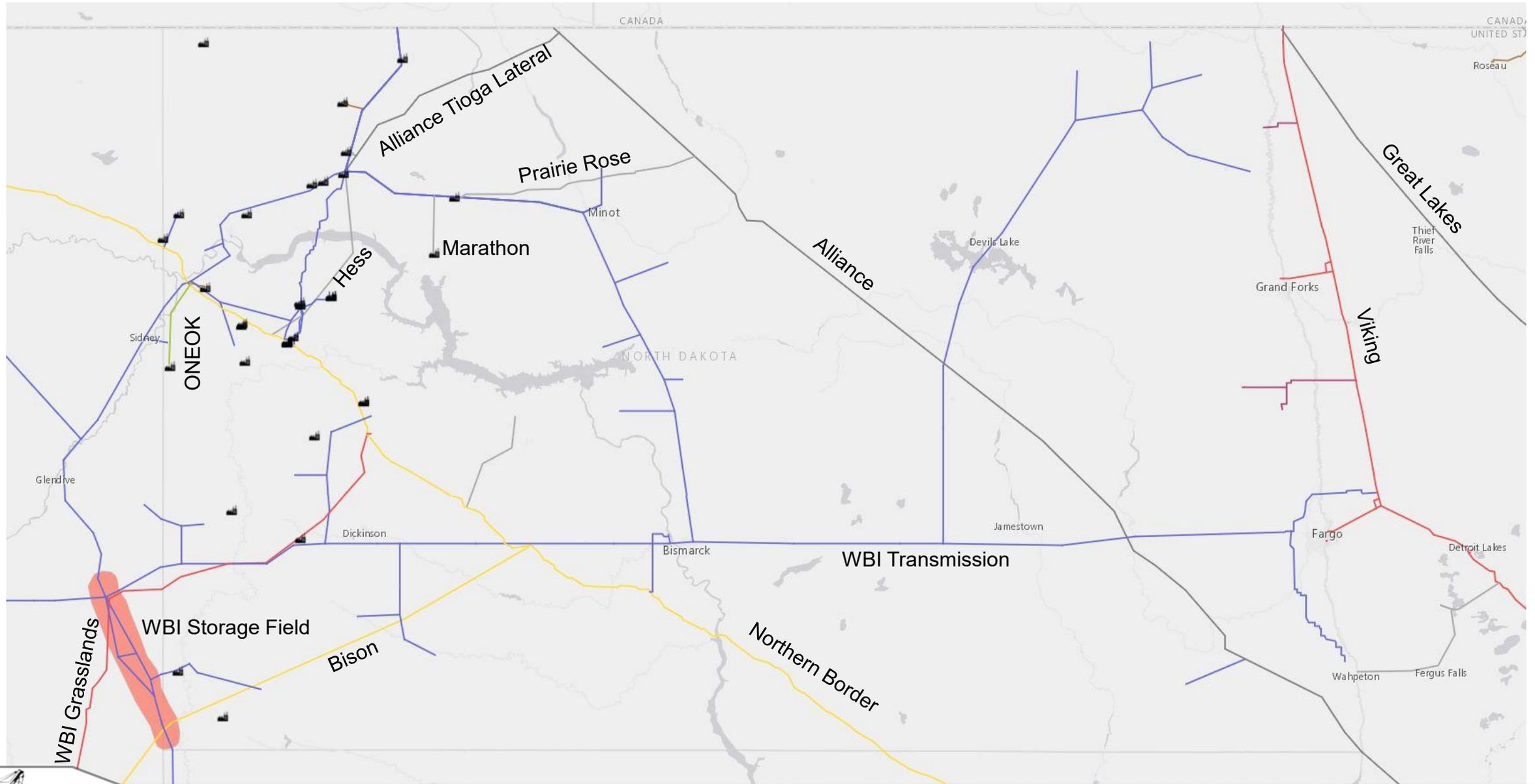
North Dakota Gas Processing Outlook



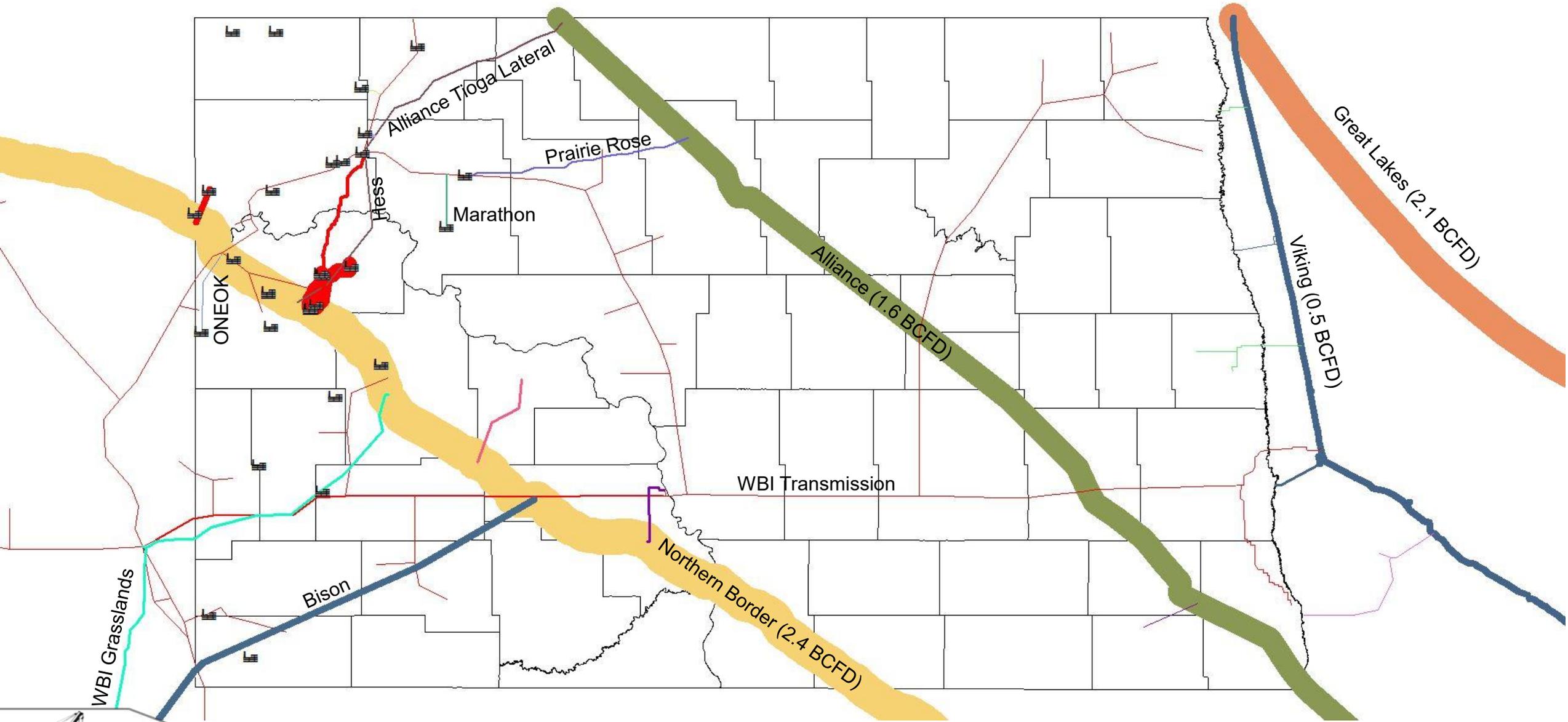
Bakken Natural Gas Infrastructure



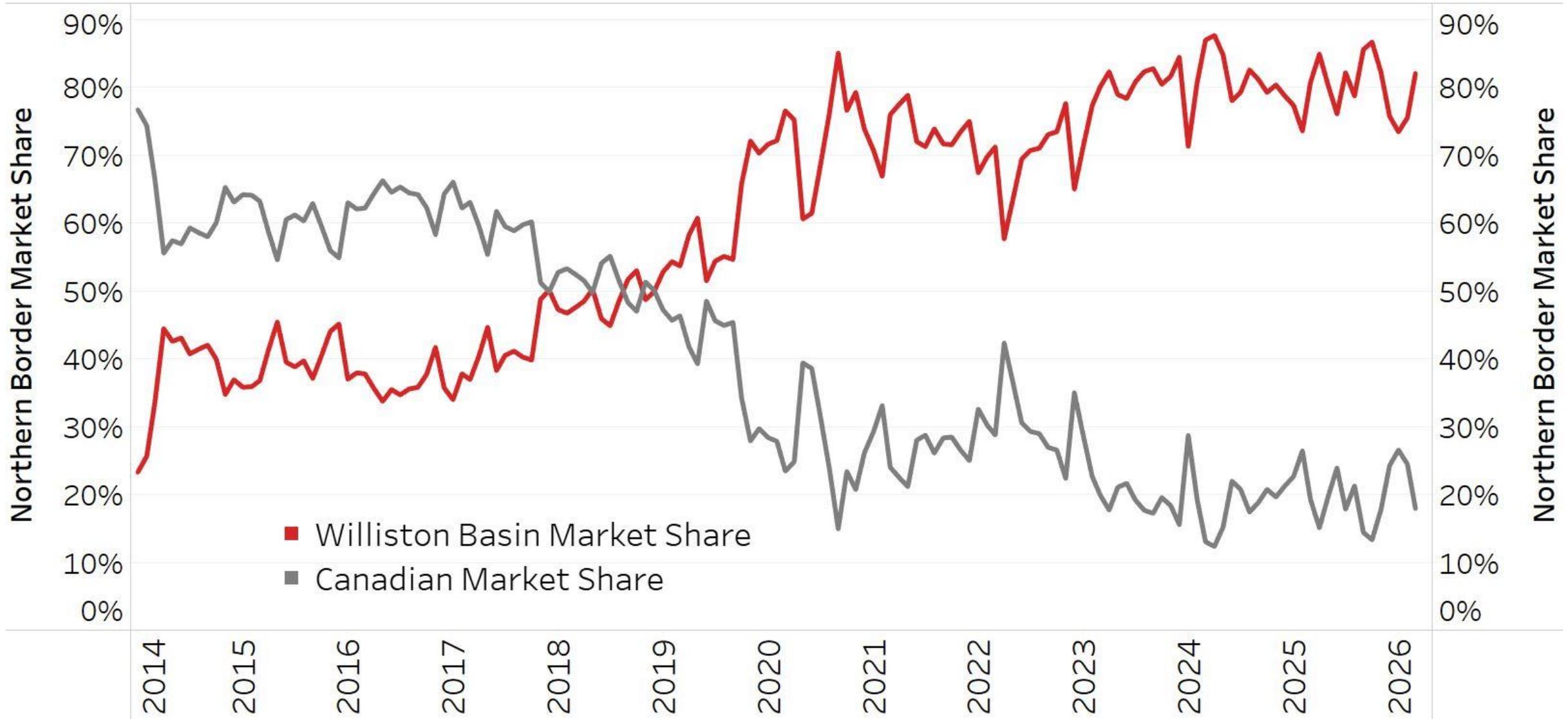
Major Residue Gas Pipeline Infrastructure



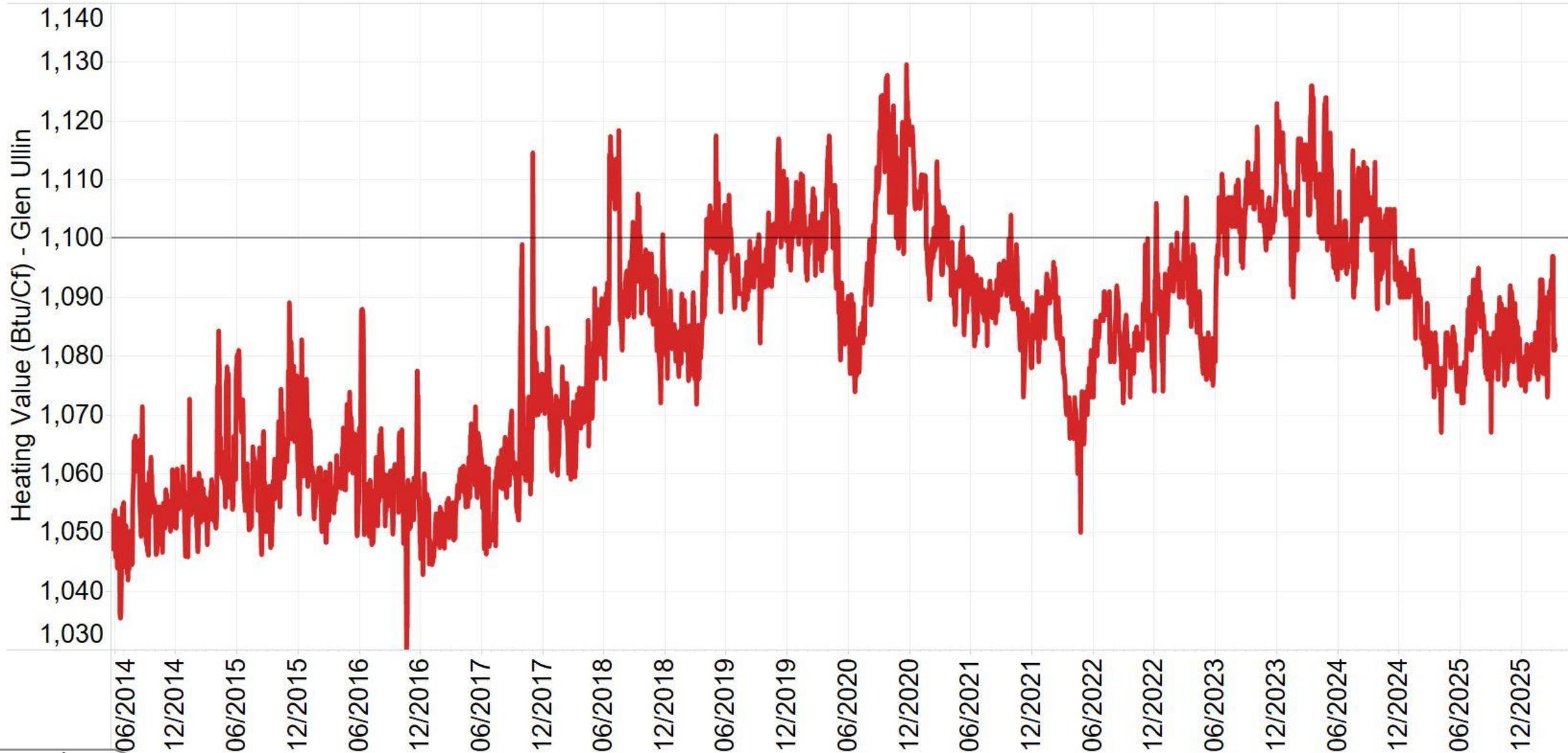
Residue Gas Pipeline Capacity Visualization



Northern Border Pipeline Market Share



Northern Border BTU at Glen Ullin, ND



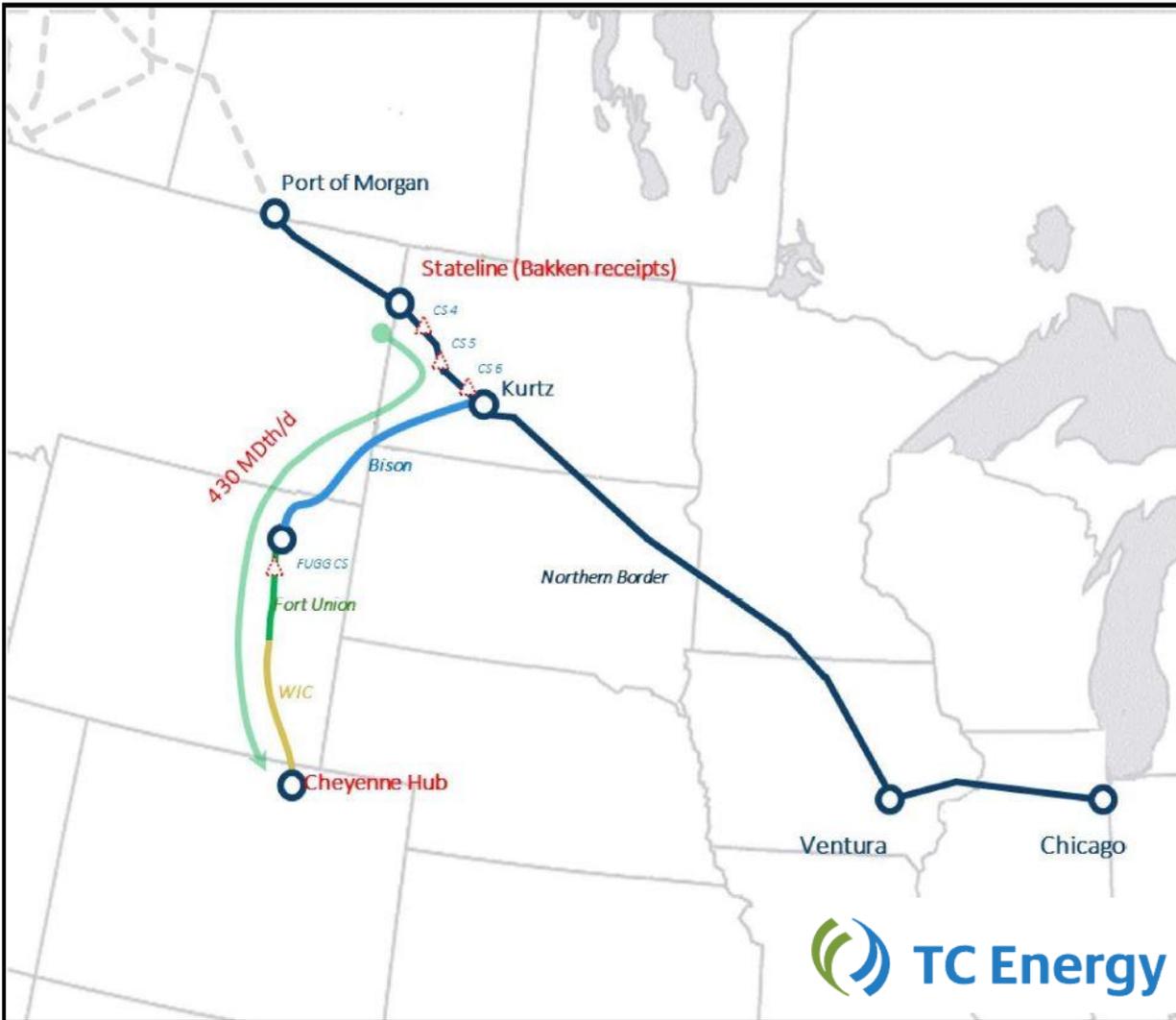
TC Energy / Kinder Morgan: Bakken xPress Project

Project Highlights

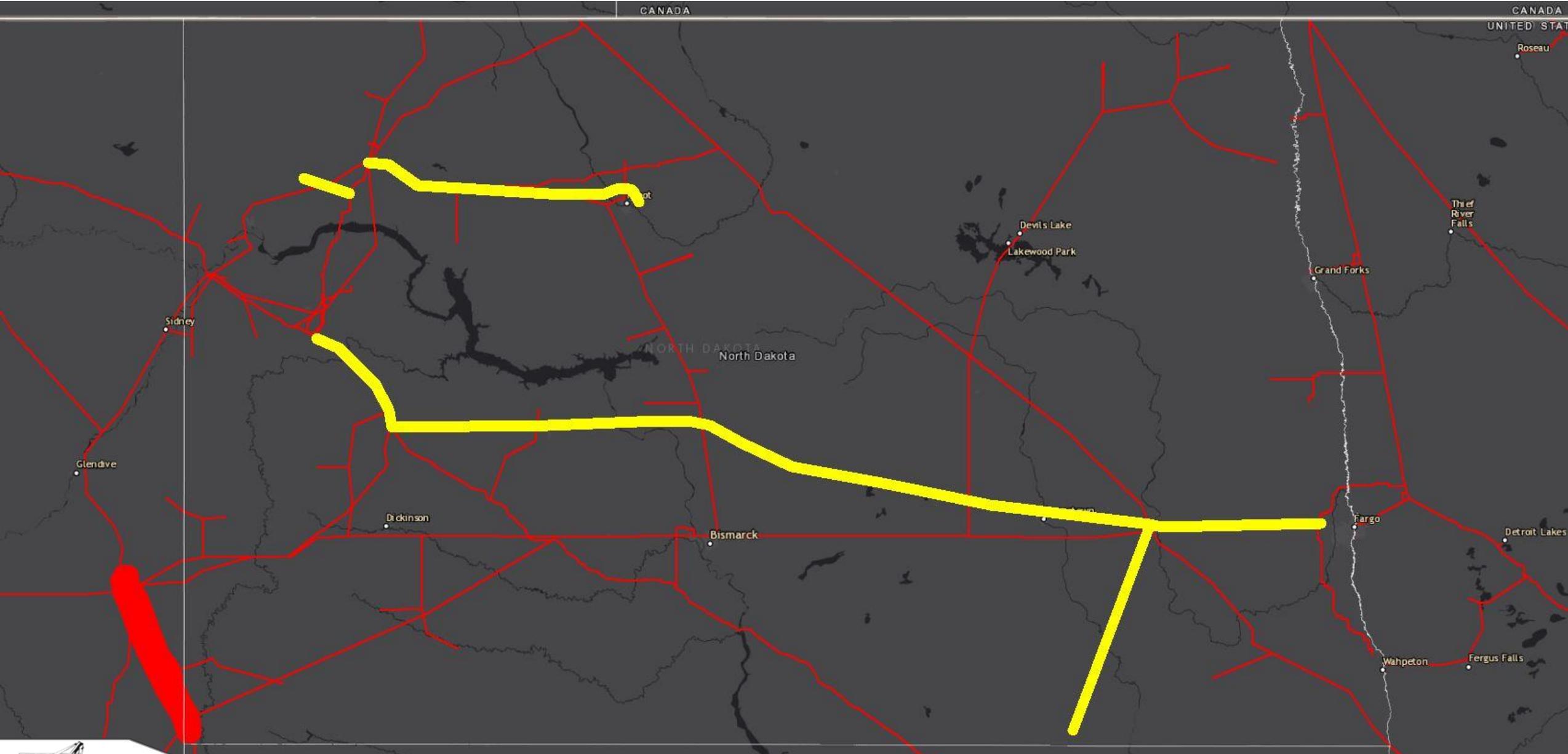
- Non-binding open season April 4 - May 6, 2022
- Binding Open Season: June 1-30, 2023
- Three compressor upgrades in North Dakota
- Reverse the idle Bison Pipeline (30" – 302 Mile)
- Capacity 300,000 Dth/Day (430,000 Offered)
- **May 2026** targeted in-service date
- Fort Union Gas Gathering and Wyoming 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
- Binding open season Feb 2 – Mar 12, 2026
- 455 Miles: 36", 30", & 20" Pipe
- Proposed Capacity 1,400,000 to 1,700,000 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

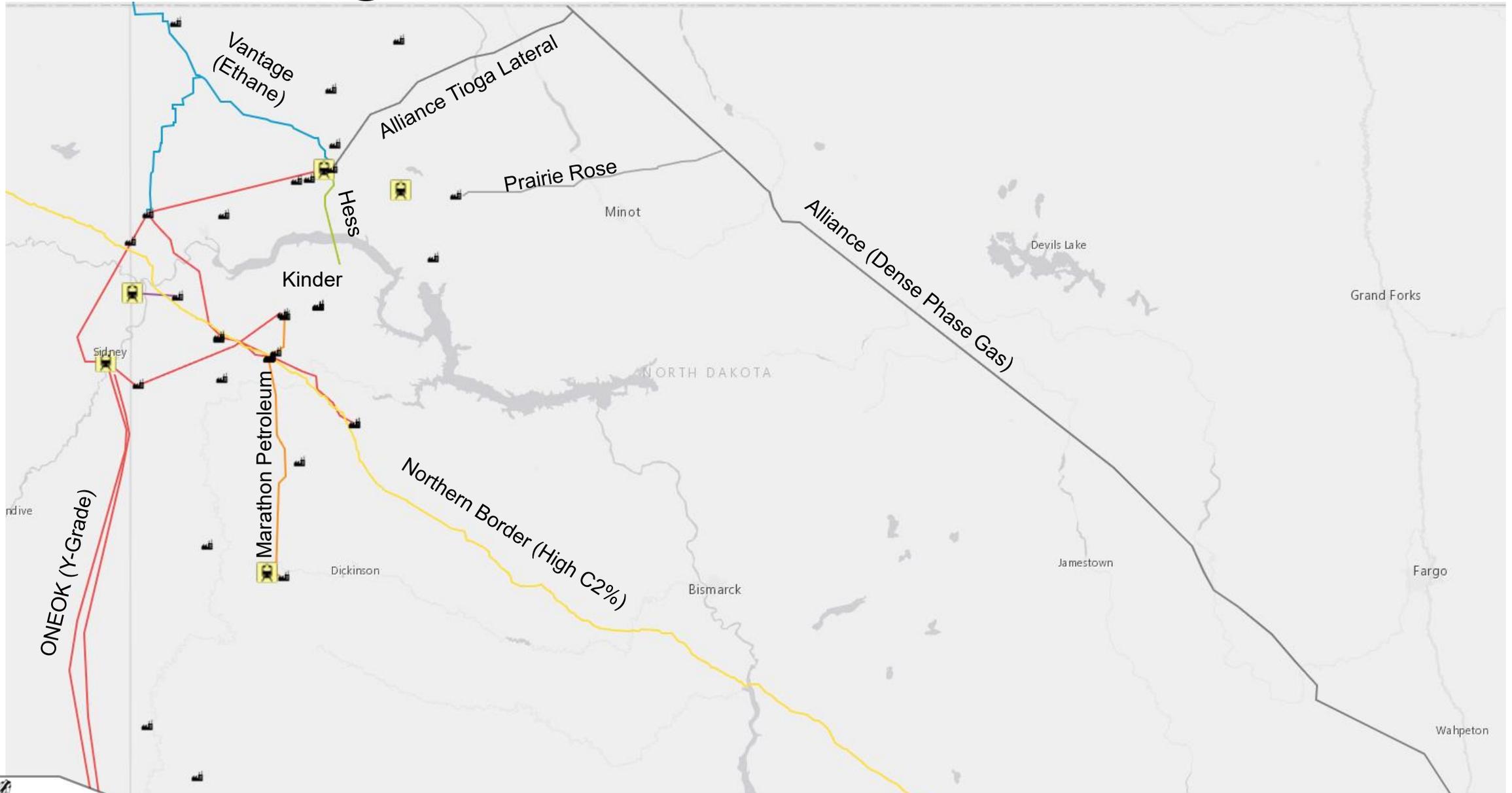
- Non-binding open season Apr 17 – May 23, 2025
- 208 Miles: 30" Pipe
- Proposed Capacity 430,000 Dth/Day
- January 2030 targeted in-service
- Seeking commitments 10yrs or Longer

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



Contact Information

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