

# Pipeline Authority Monthly Update

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*Director*

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**April 21, 2026**



# US Williston Basin Oil Production - 2026

MONTH	ND	Eastern MT*	SD	TOTAL
January	1,125,728		2,181	
February	1,129,813		2,176	
March				
April				
May				
June				
July				
August				
September				
October				
November				
December				

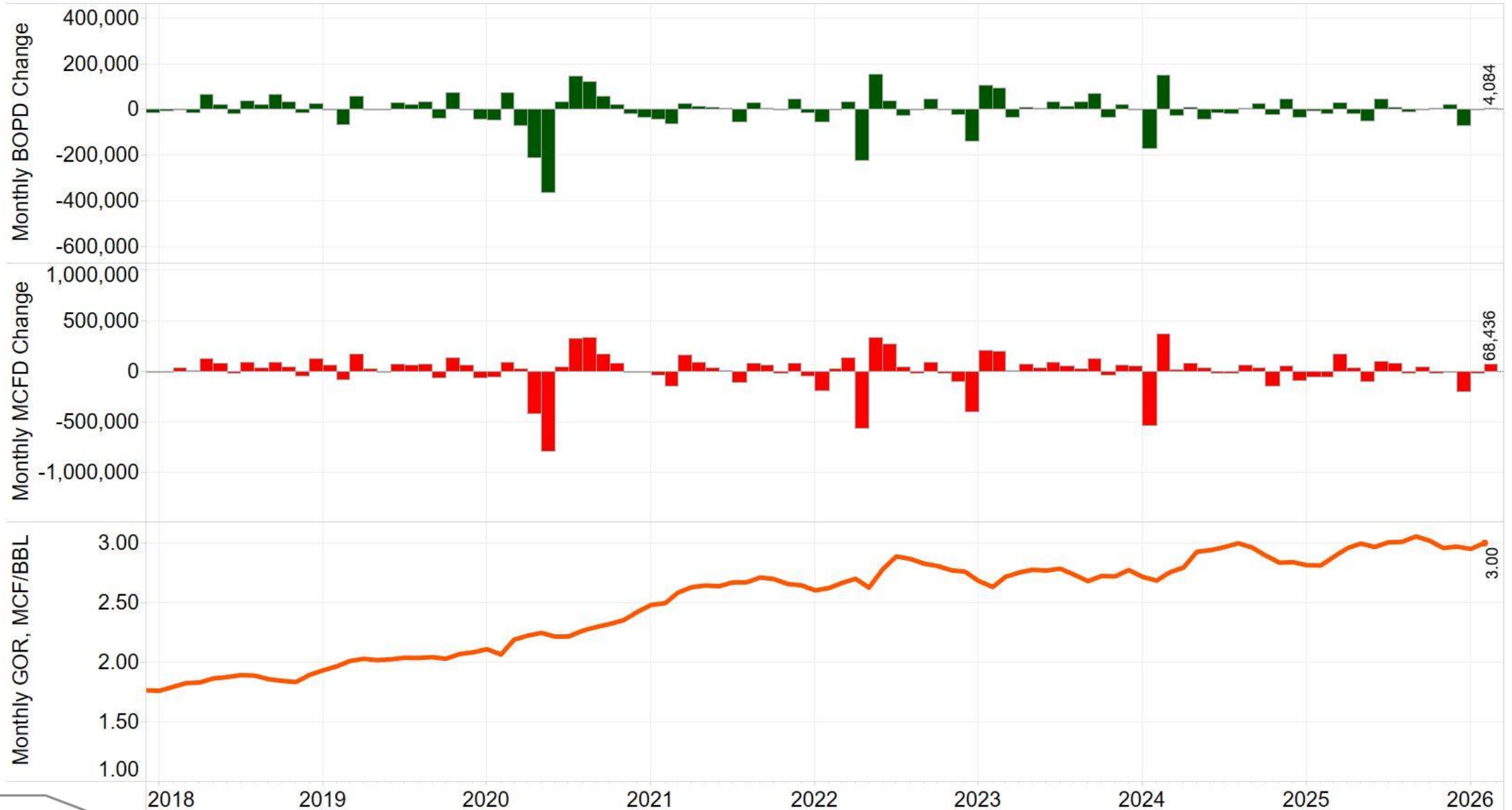


# US Williston Basin Oil Production - 2025

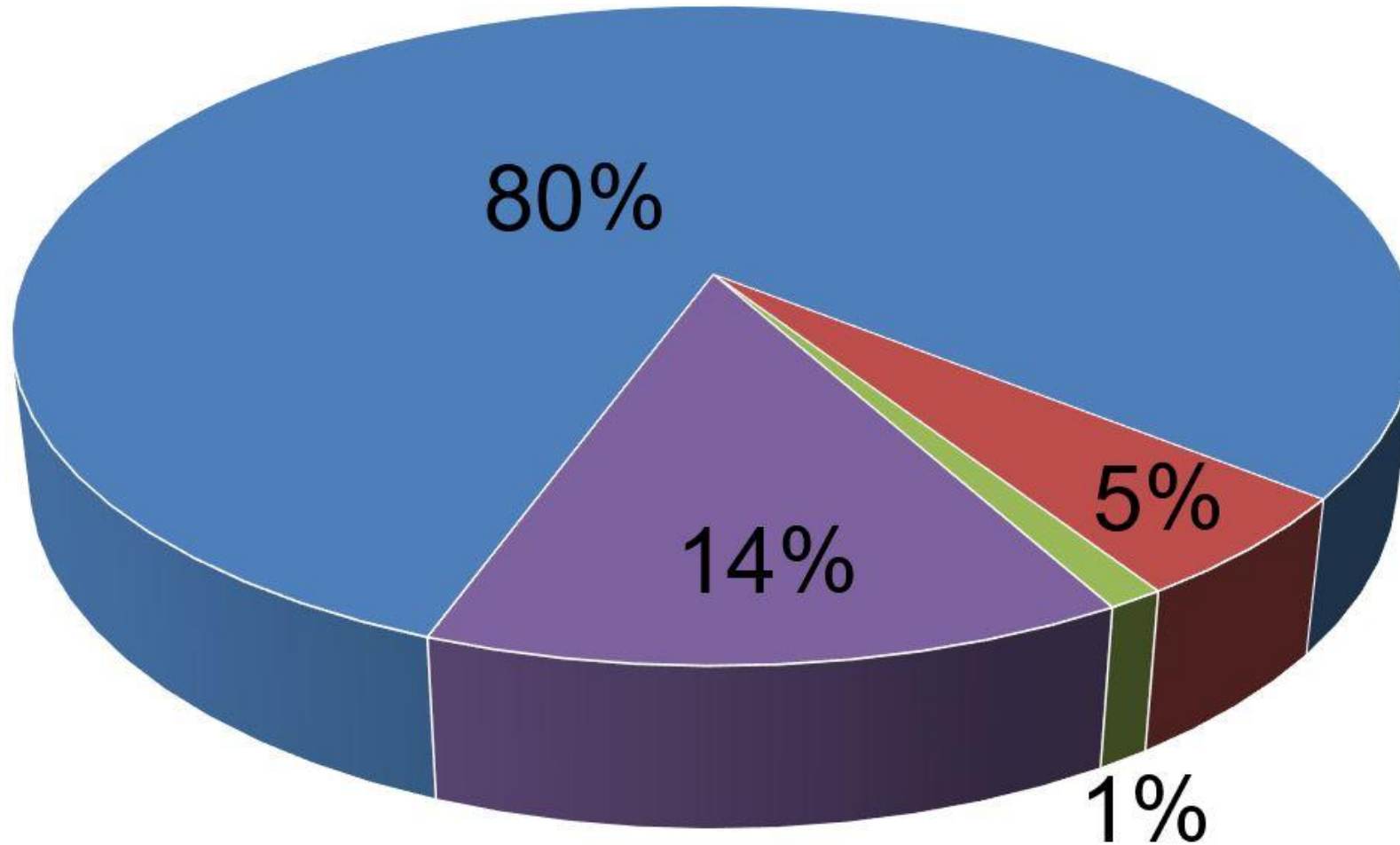
MONTH	ND	Eastern MT*	SD	TOTAL
January	1,183,077	75,045	2,281	1,260,403
February	1,165,229	71,713	2,282	1,239,224
March	1,195,030	76,008	2,272	1,273,310
April	1,175,943	74,904	2,294	1,253,141
May	1,127,014	79,643	2,295	1,208,952
June	1,172,718	79,742	2,145	1,254,605
July	1,184,124	80,475	2,271	1,266,870
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

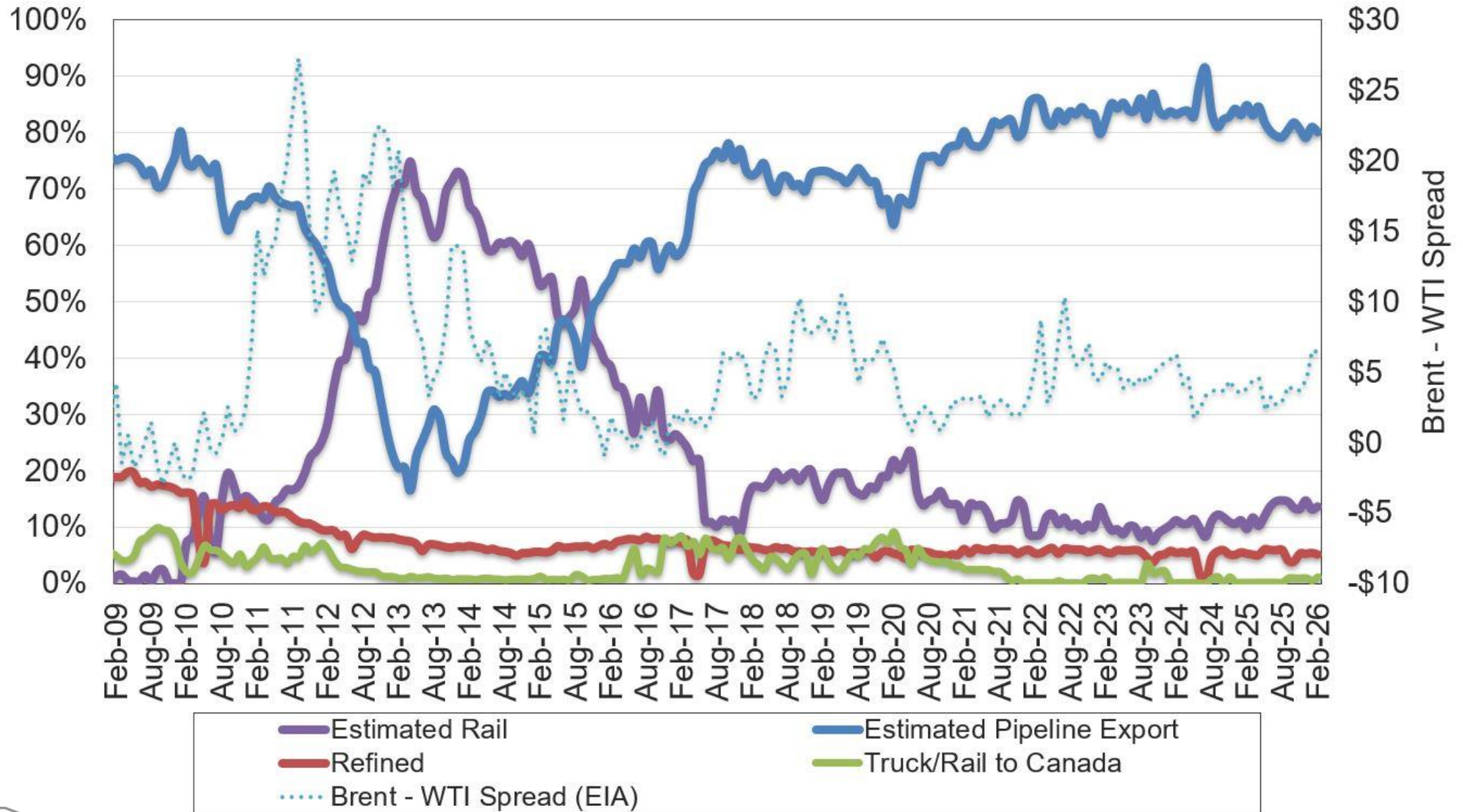
■ Truck/Rail to Canada

■ Refined

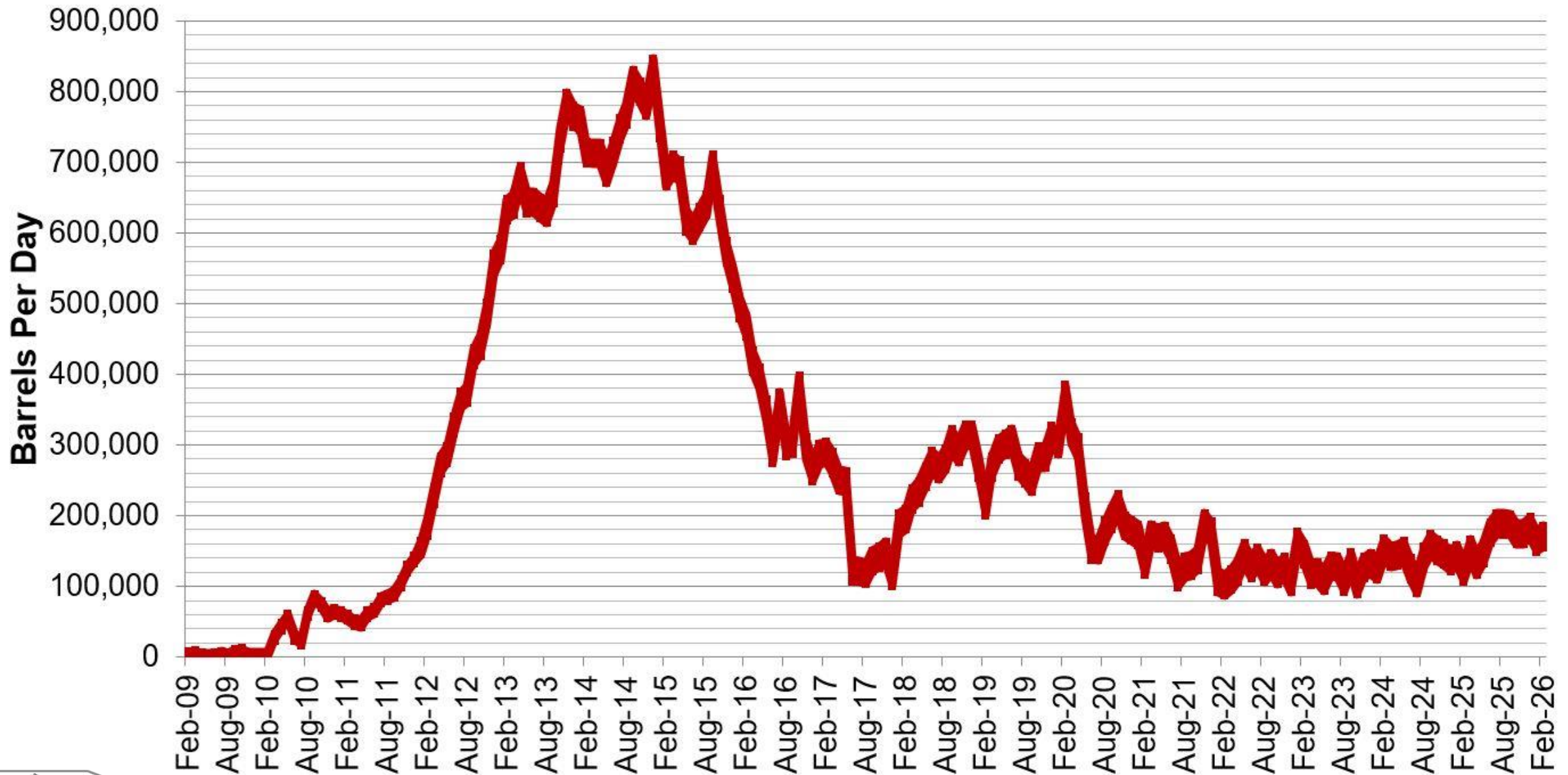
■ Estimated Rail



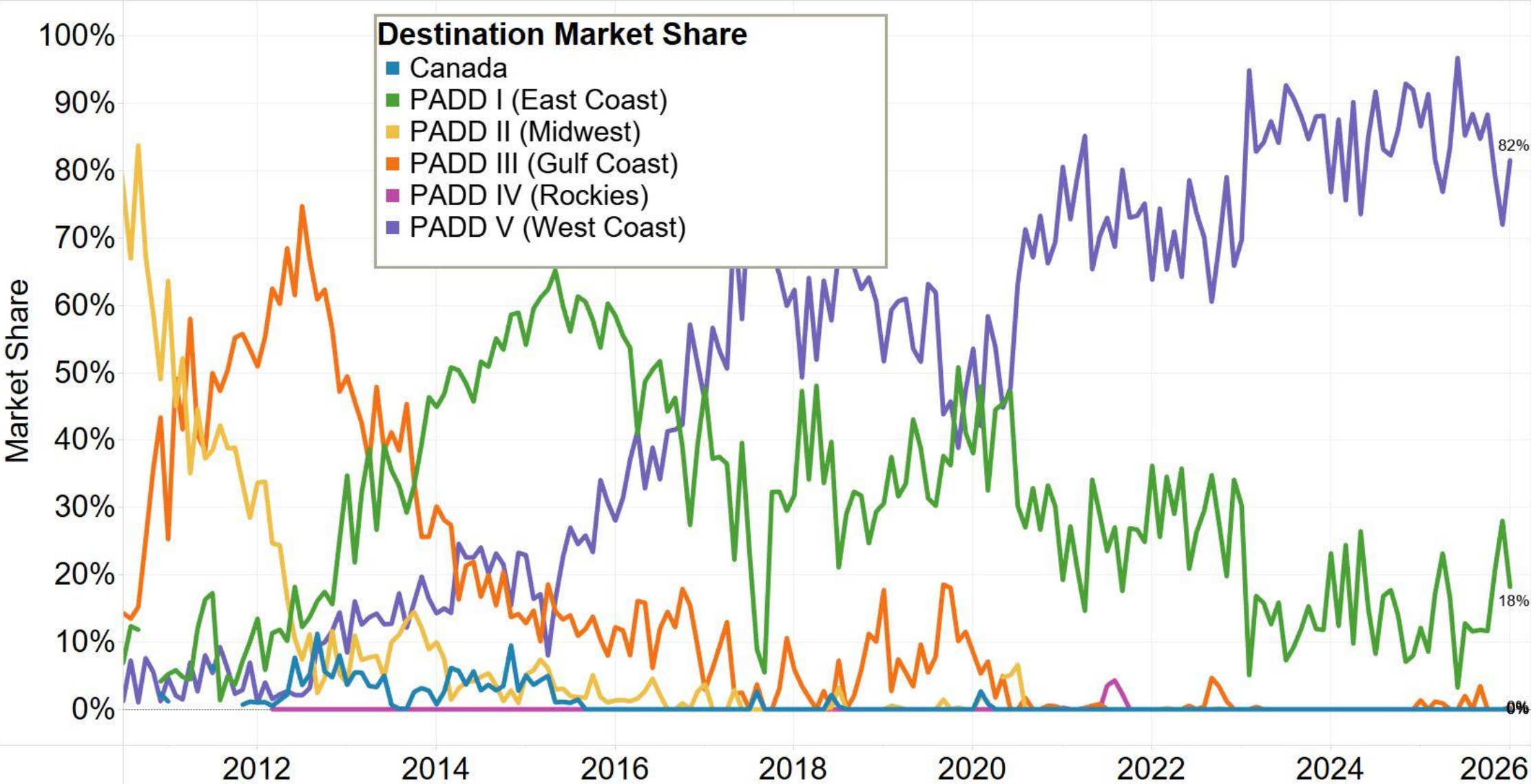
# Estimated Williston Basin Oil Transportation



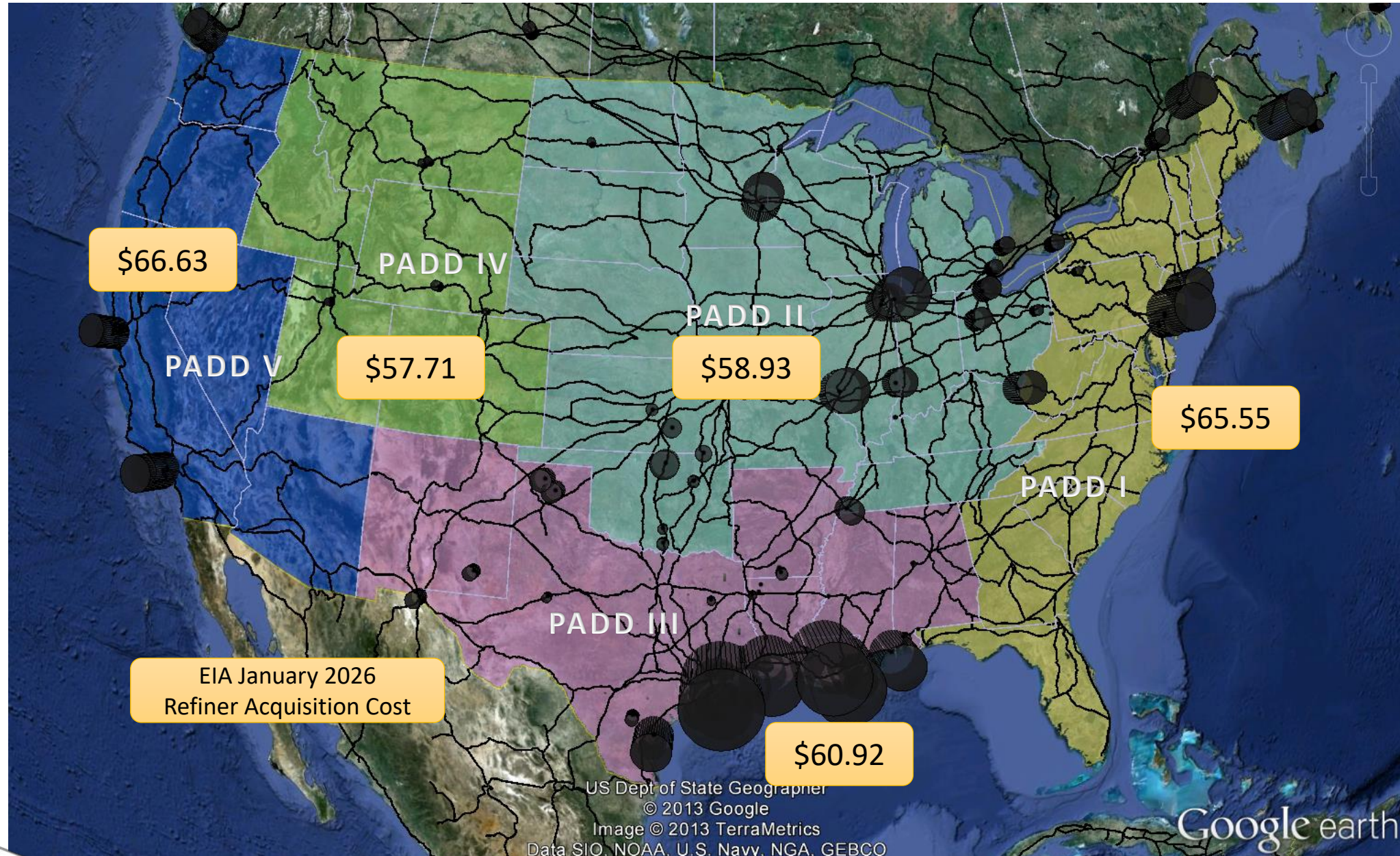
# Estimated ND Rail Export Volumes



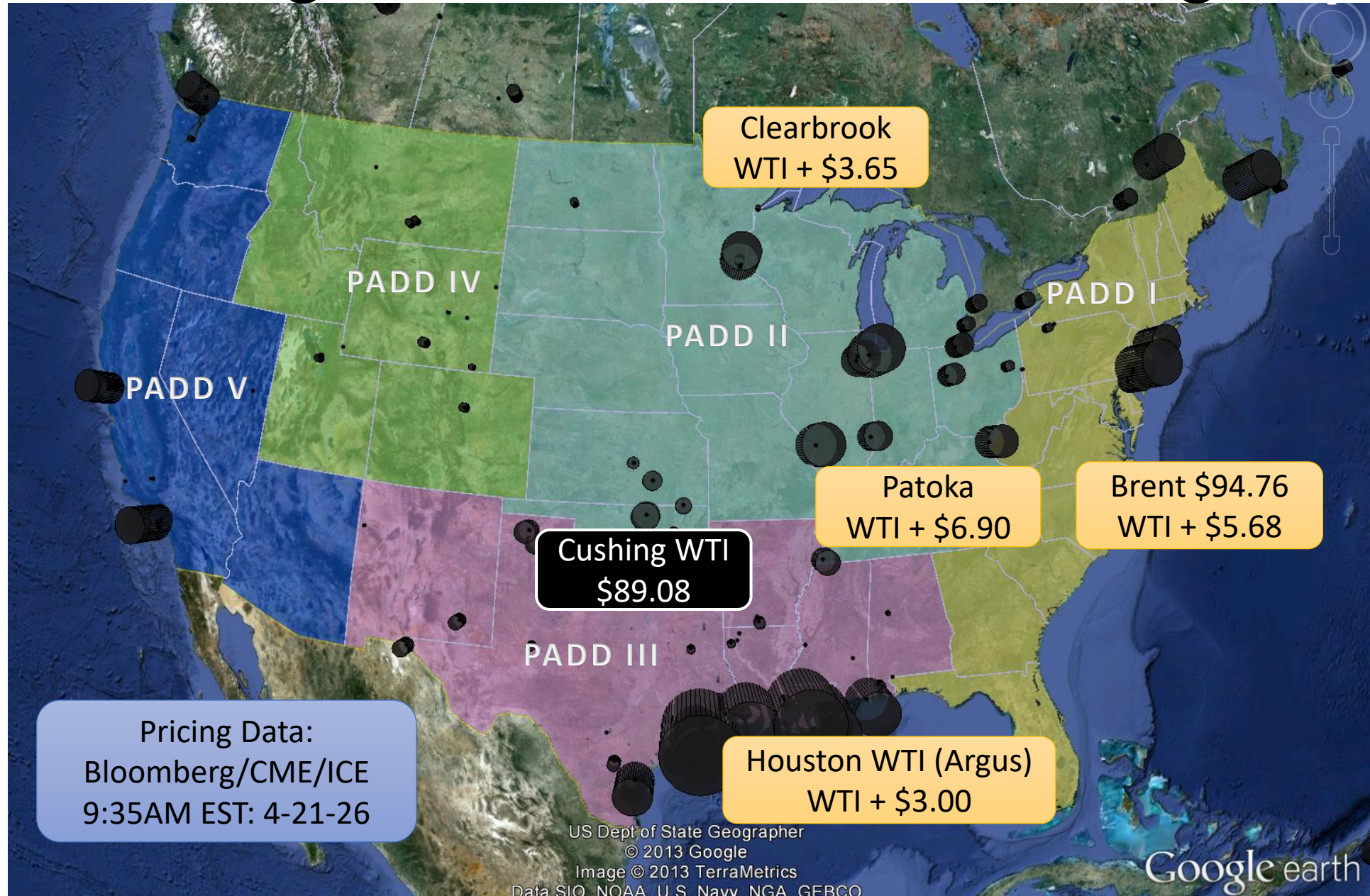
# Rail Destinations Market Share (Jan. 2026)



# Major Rail Lines and Refineries



# Major Pricing Benchmarks & Refining Centers



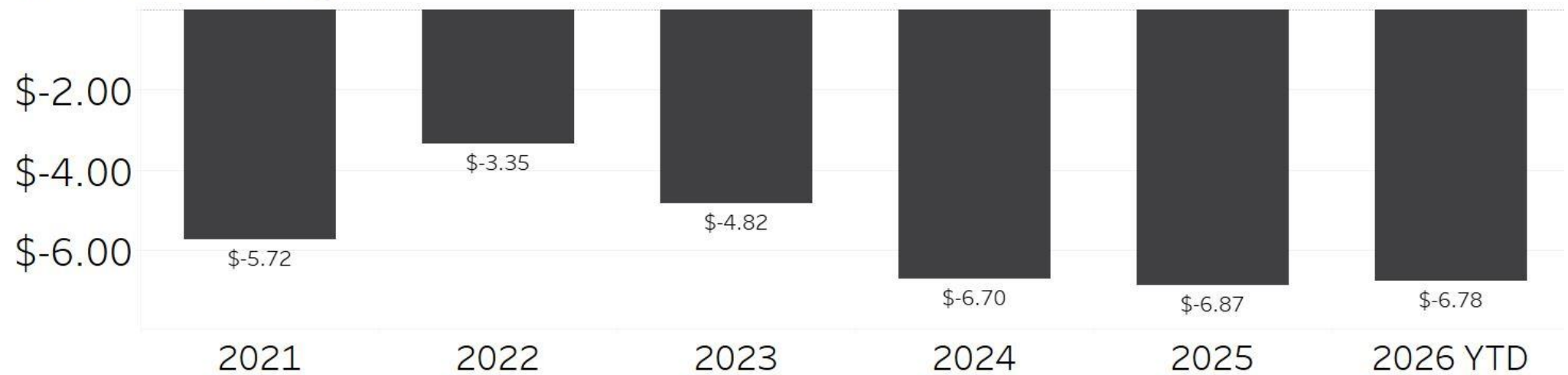
# Average North Dakota Oil “Discount” to WTI

ND Wellhead Discount to WTI

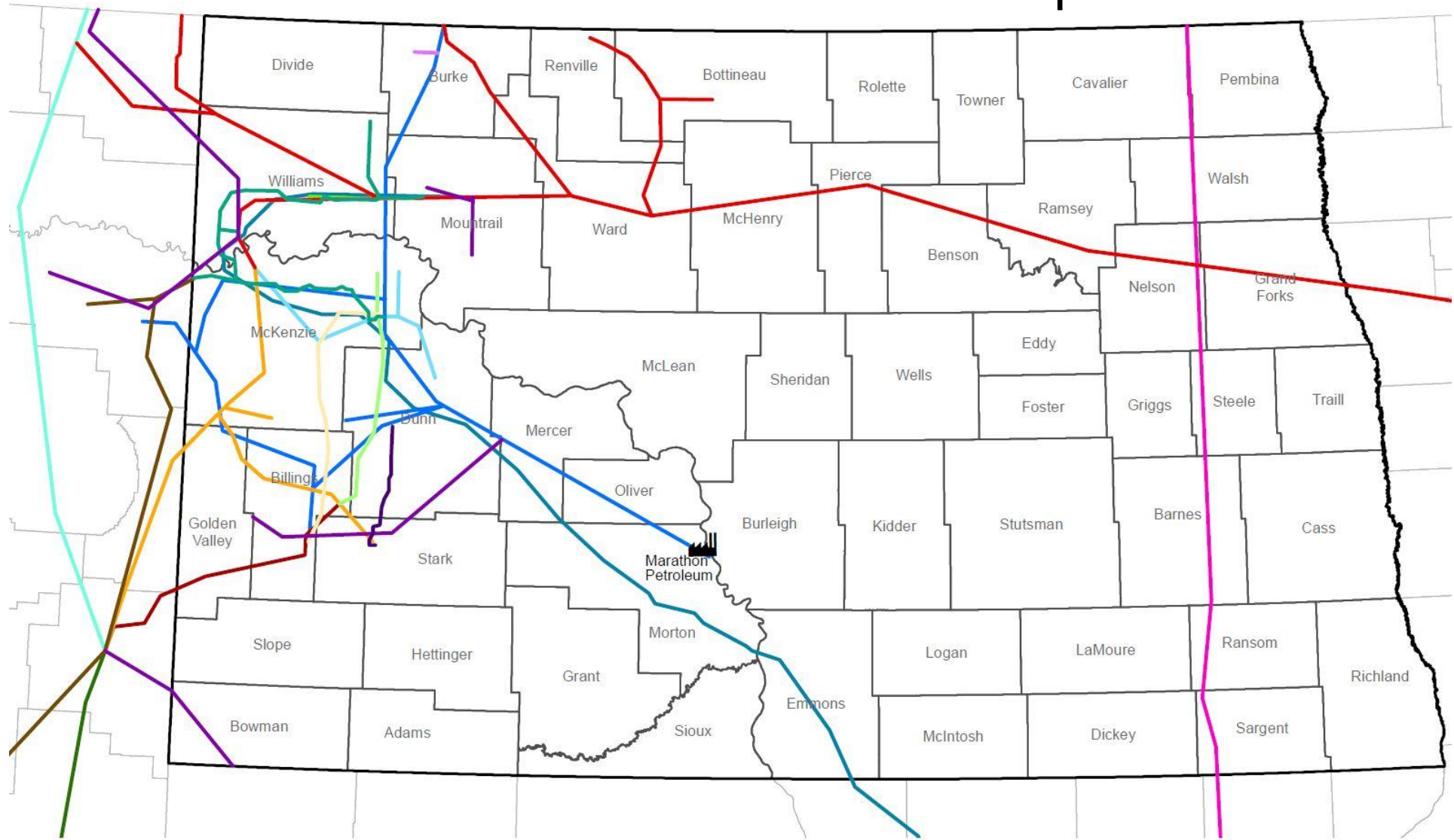


Last Five Years Annual Average

Annual ND Wellhead Discount to WTI



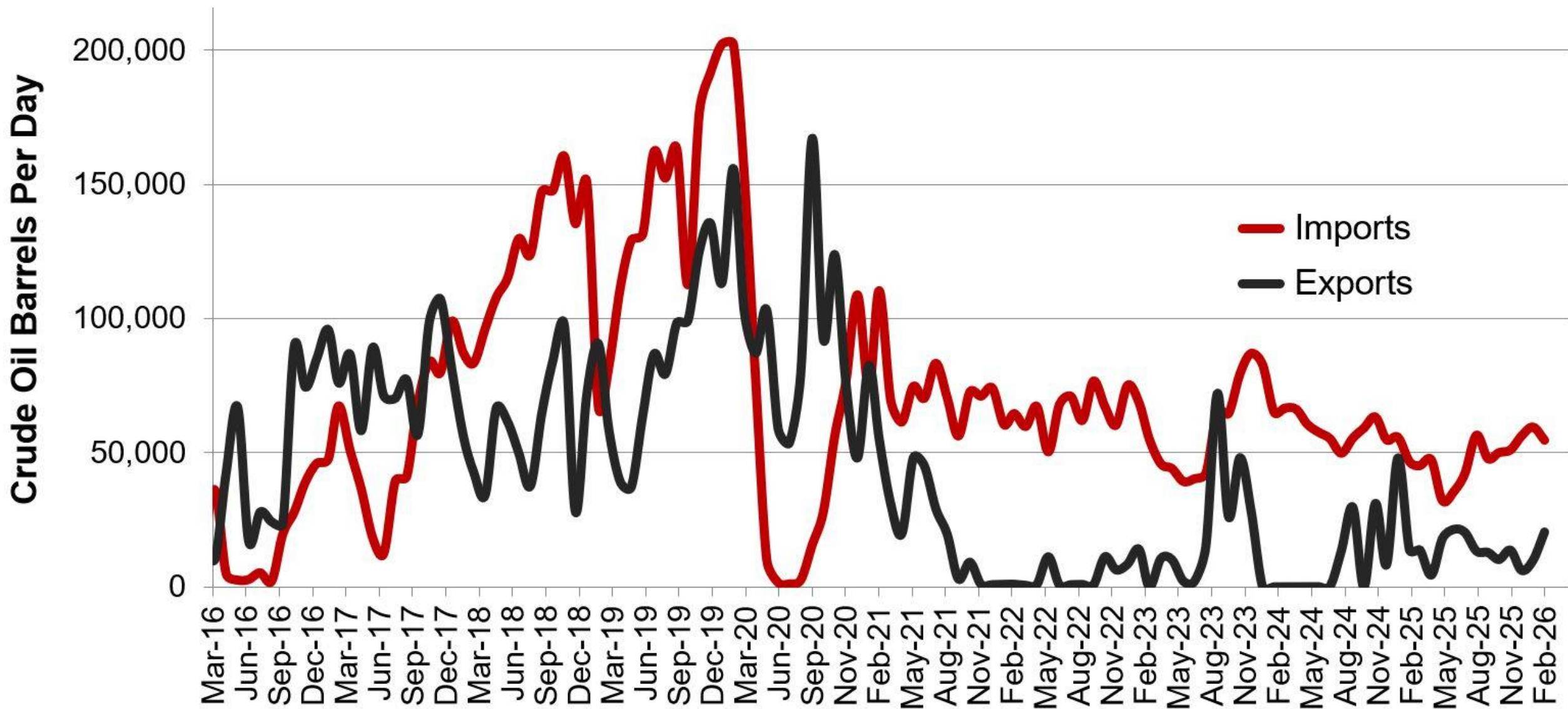
# North Dakota Oil Transmission Pipelines



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



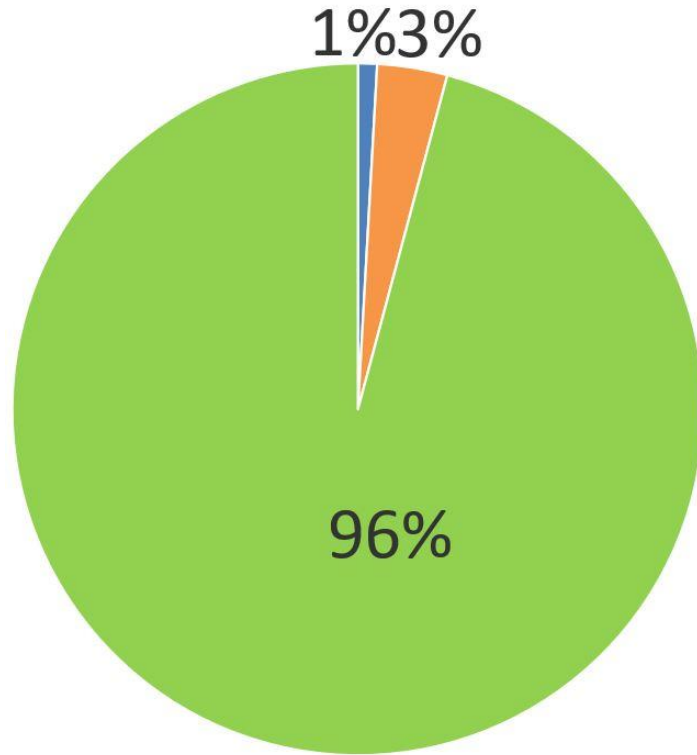
# Williston Basin Imports and Exports with Canada



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.

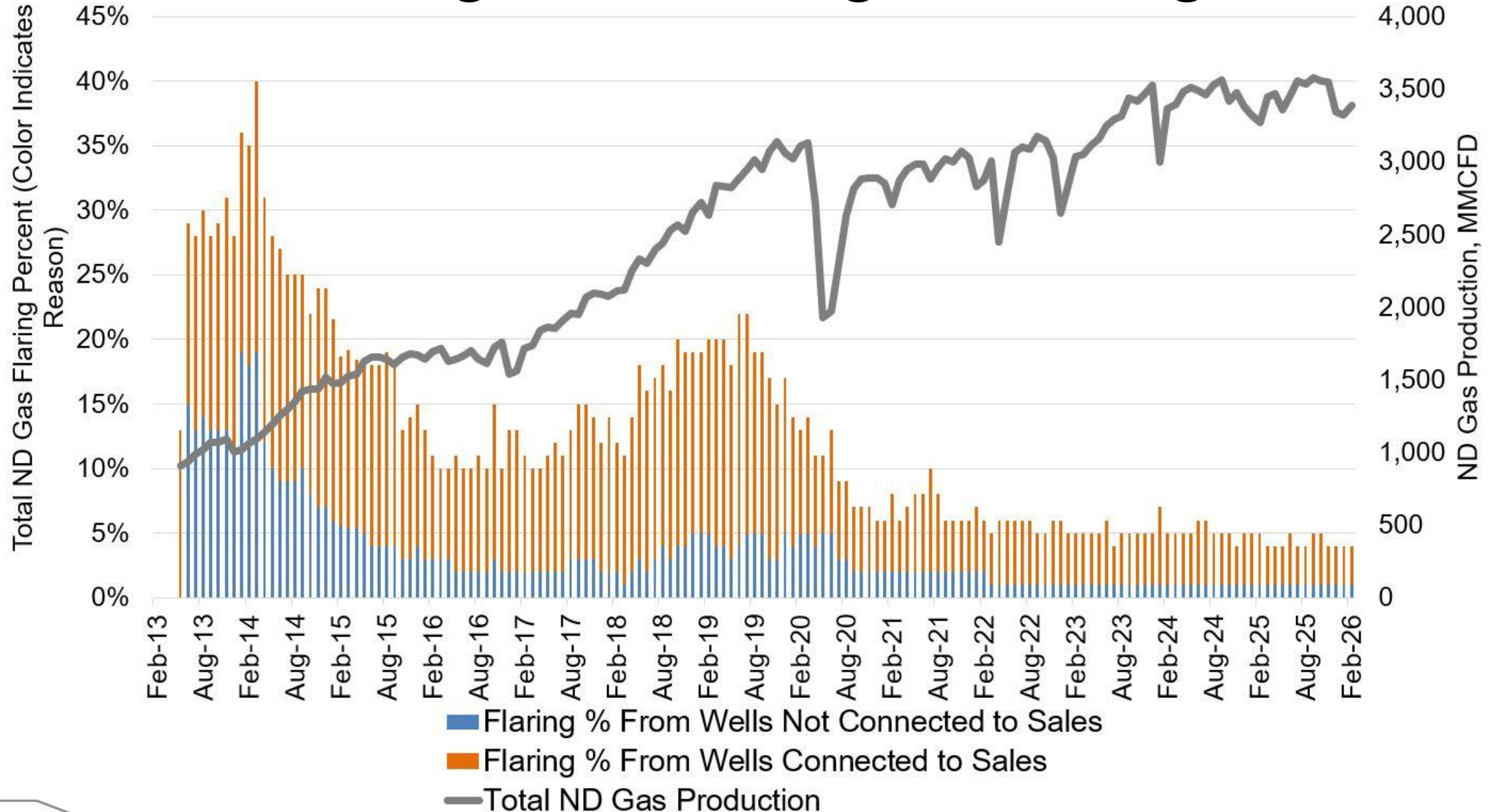
## Simple Terms

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

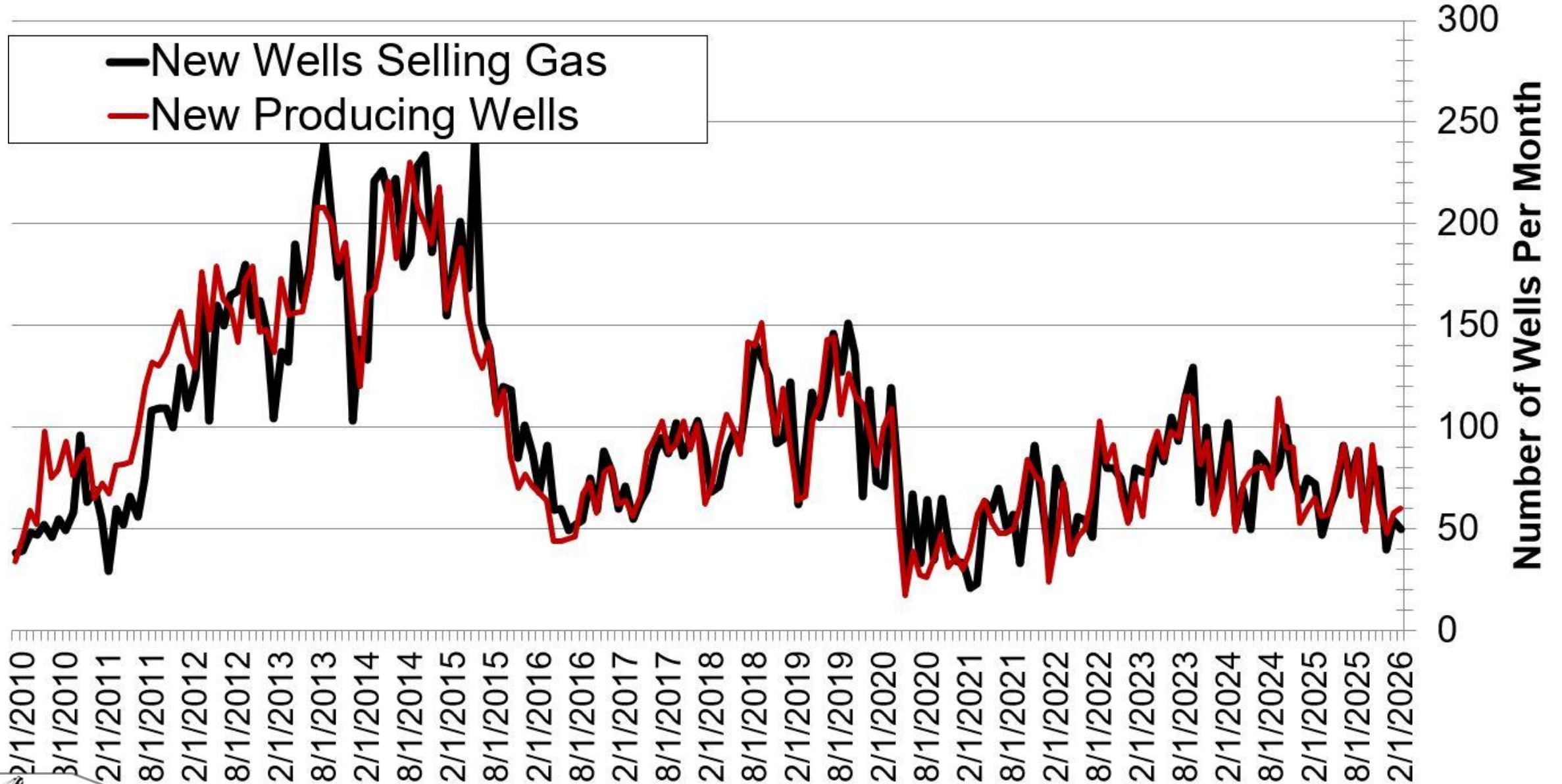
Feb. 2026 Data – Non-Confidential Wells



# Solving the Flaring Challenge



# Solving the Flaring Challenge



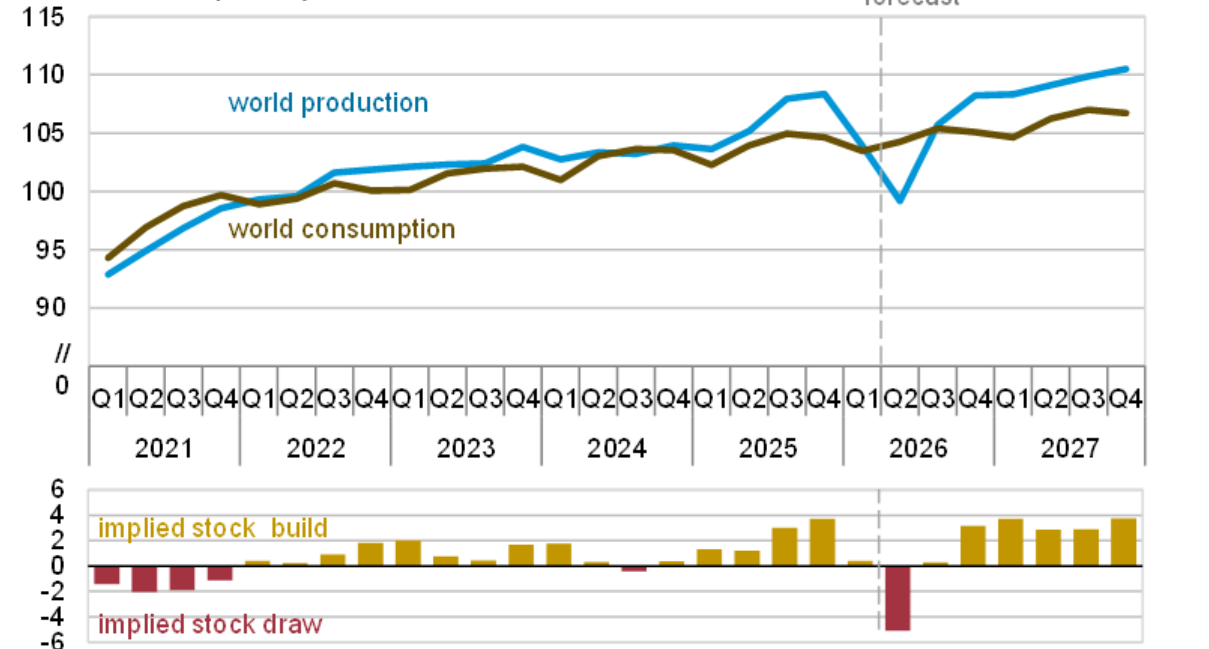
# EIA Oil Price Outlook (April 2026)

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



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

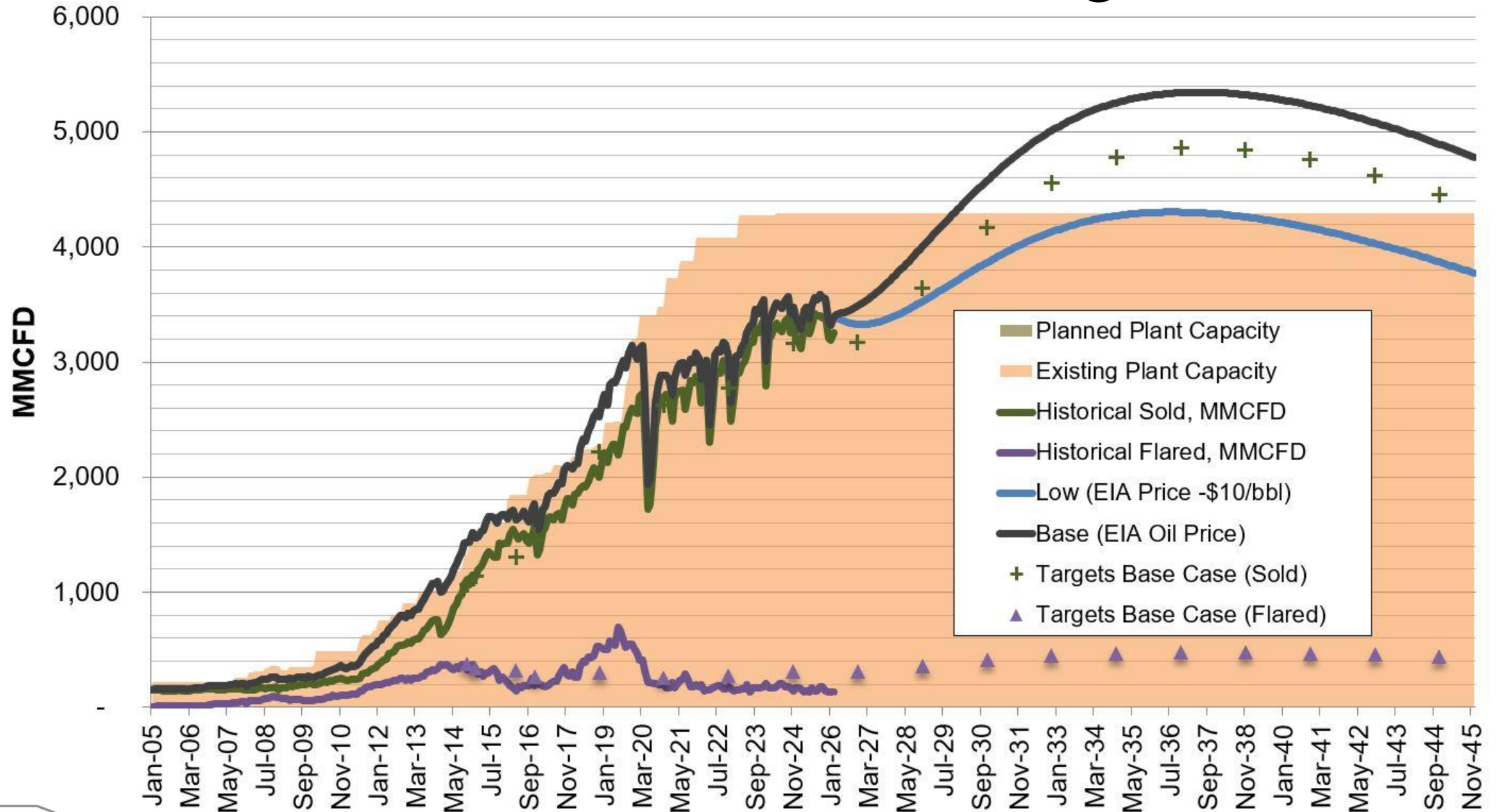
World liquid fuels production and consumption balance  
million barrels per day



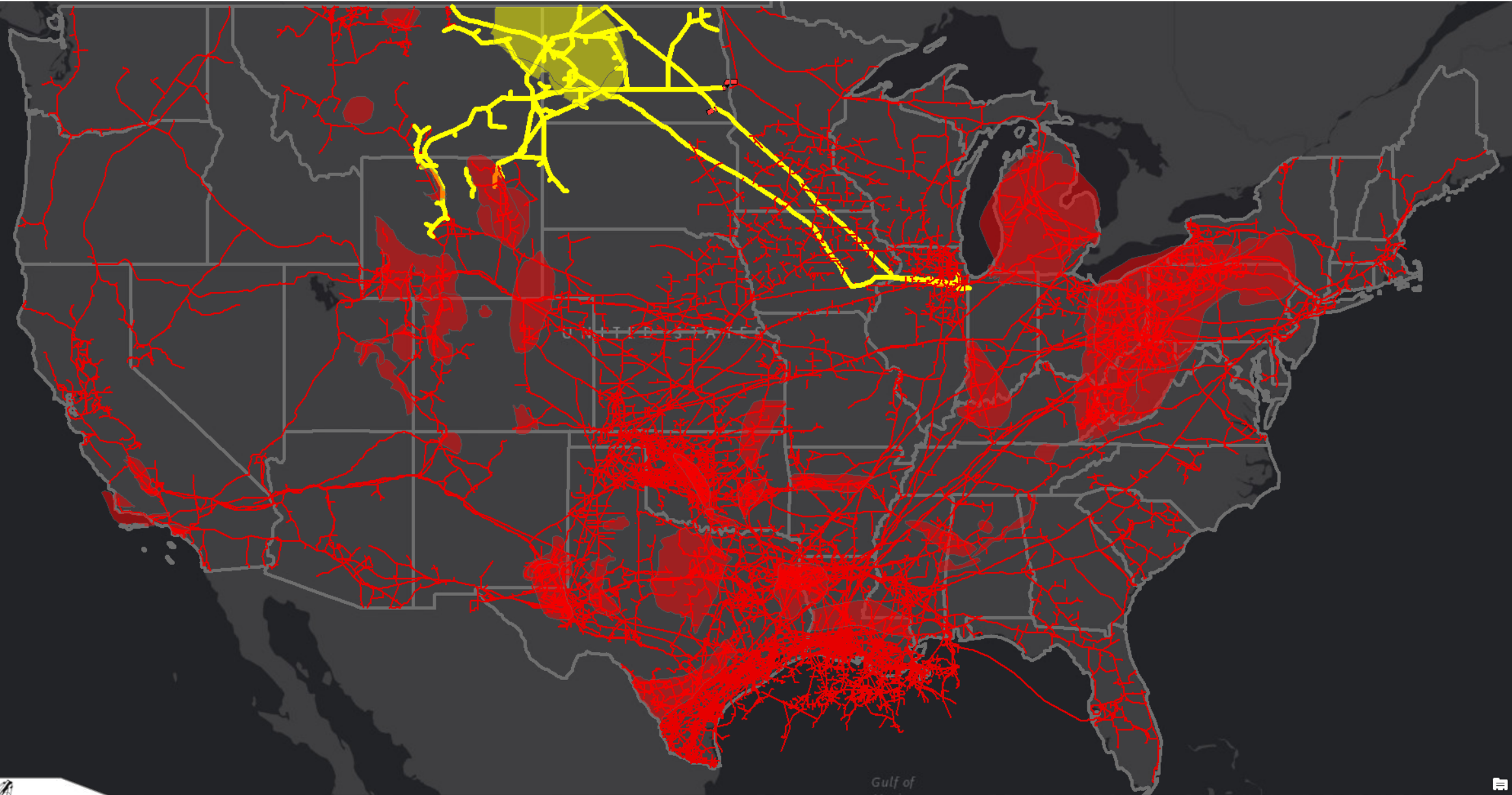
Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, April 2026



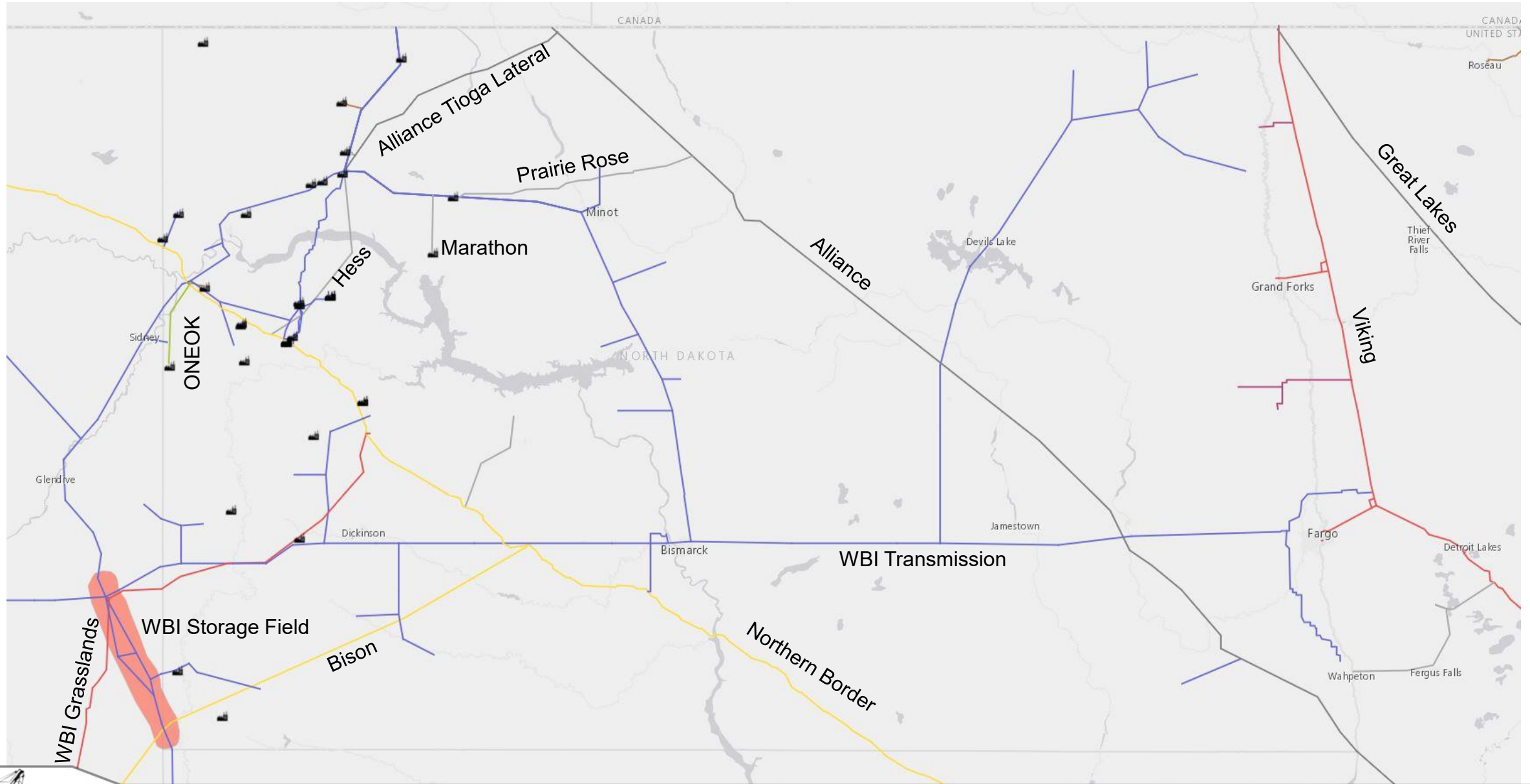
# North Dakota Gas Processing Outlook



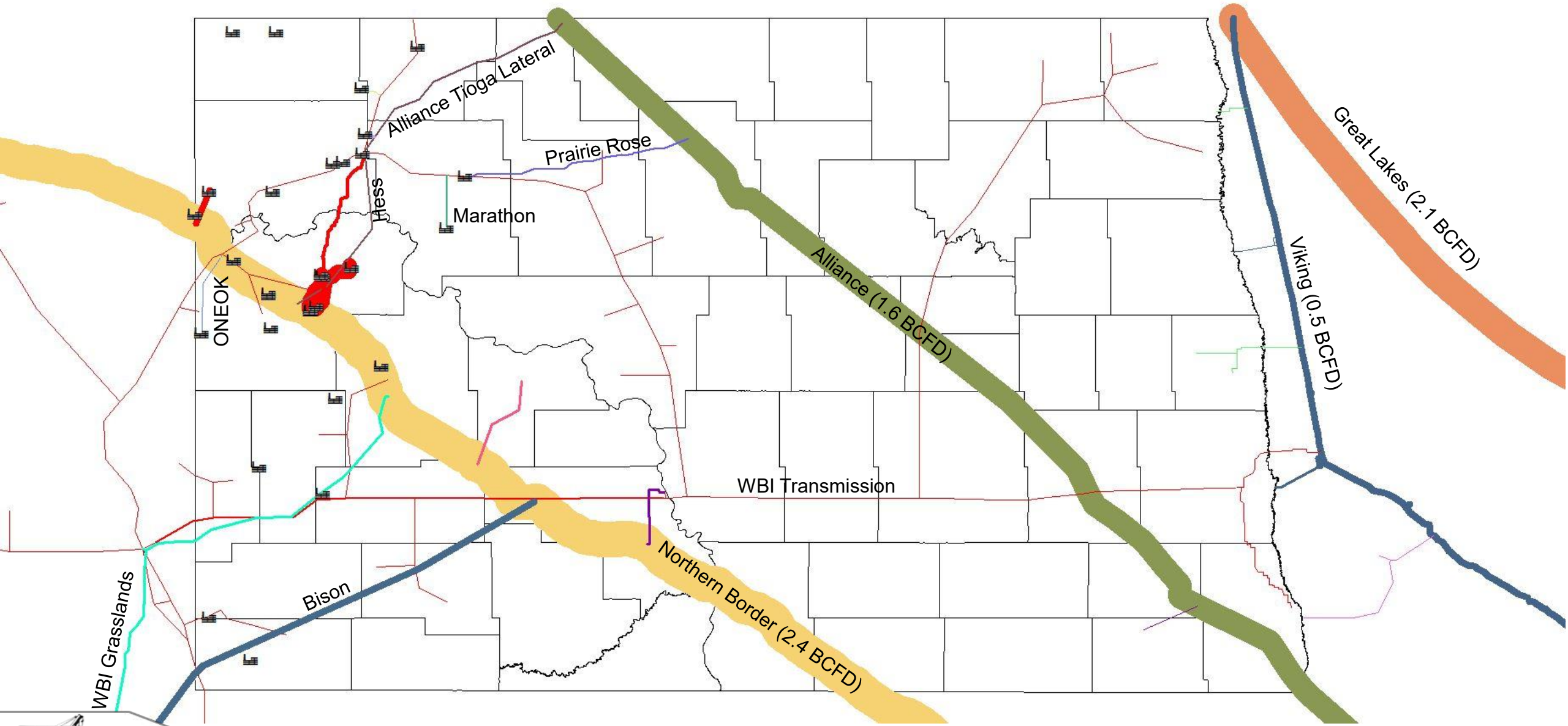
# Bakken Natural Gas Infrastructure



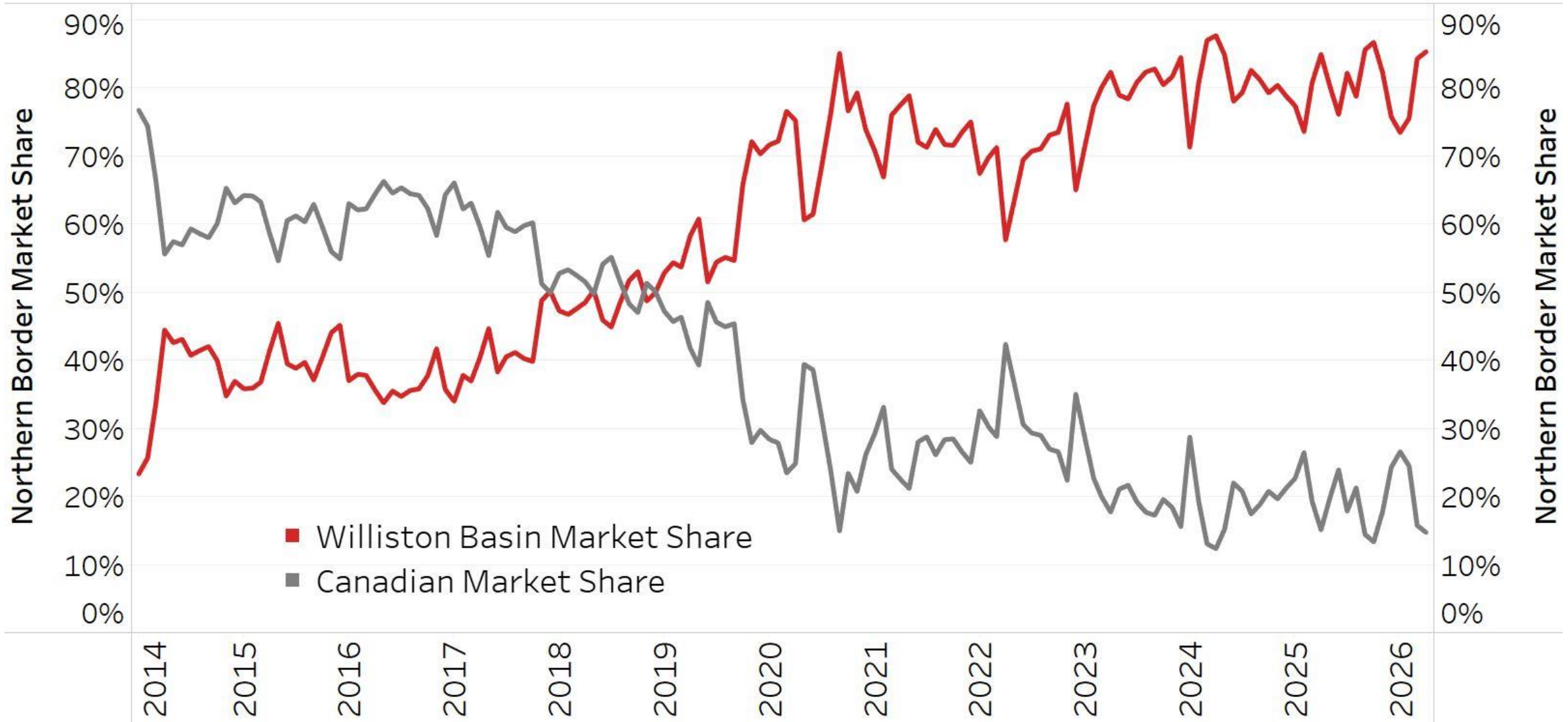
# Major Residue Gas Pipeline Infrastructure



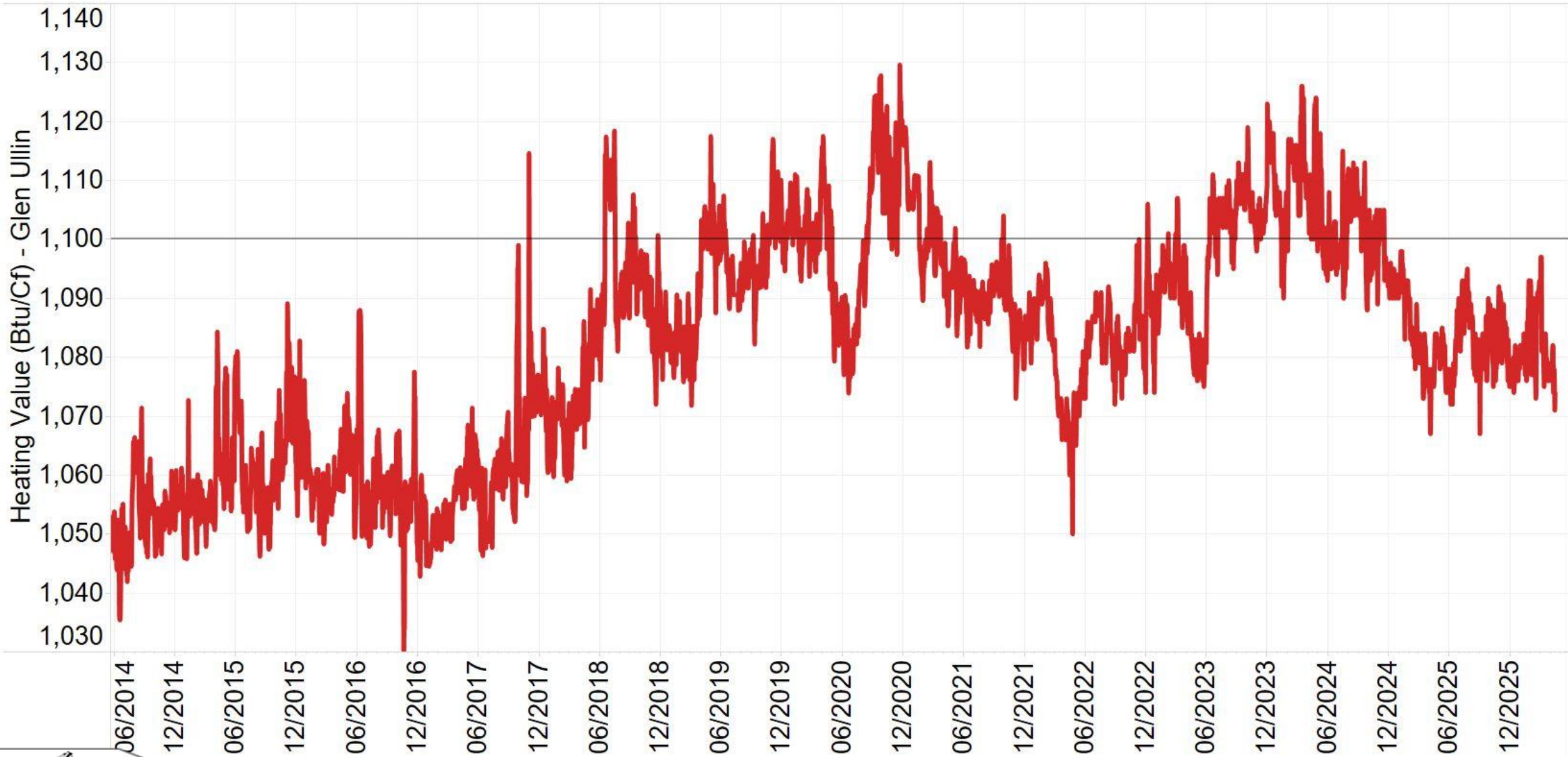
# Residue Gas Pipeline Capacity Visualization



# Northern Border Pipeline Market Share



# Northern Border BTU at Glen Ullin, ND



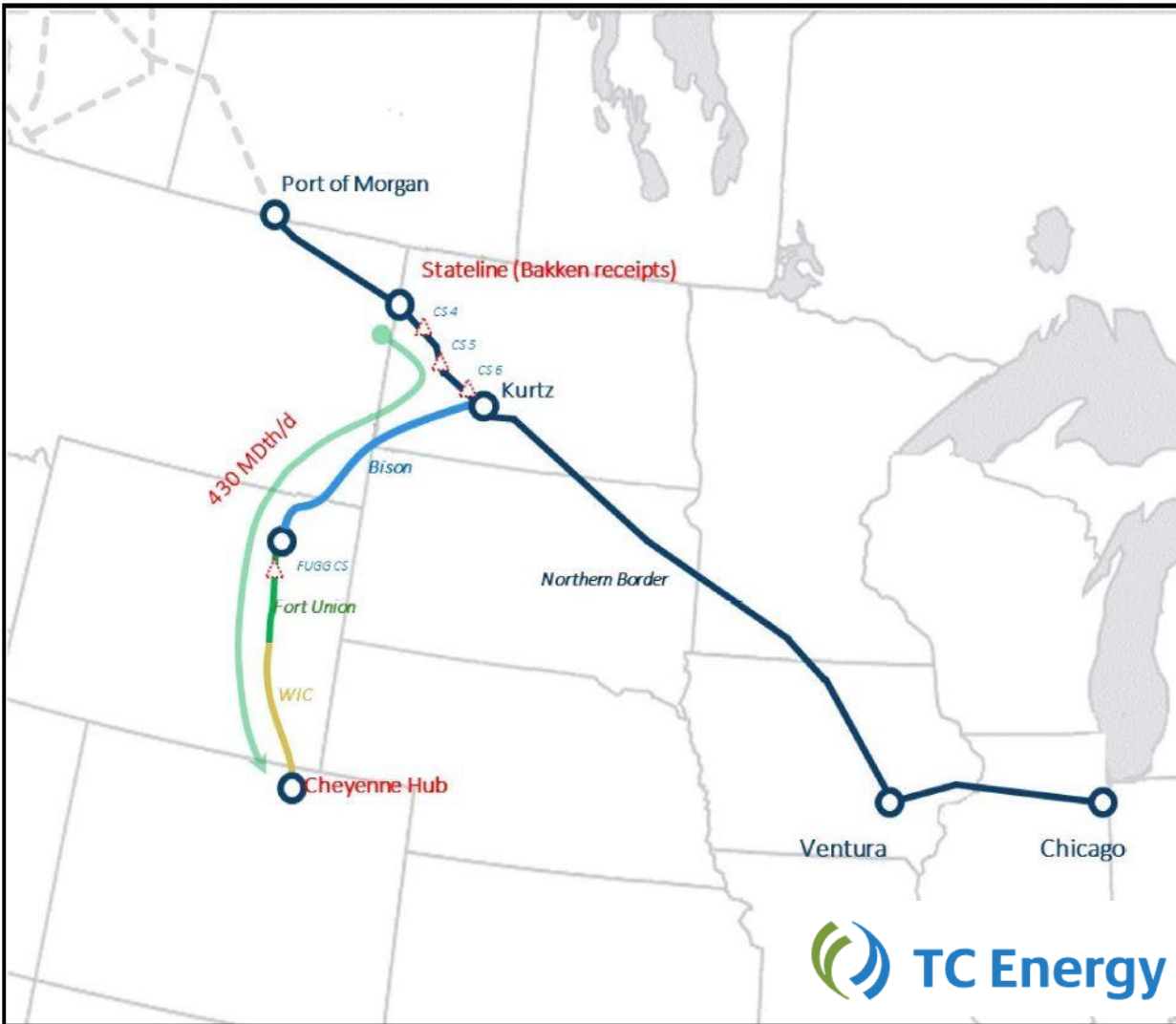
# TC Energy / Kinder Morgan: Bakken xPress Project

## Project Highlights

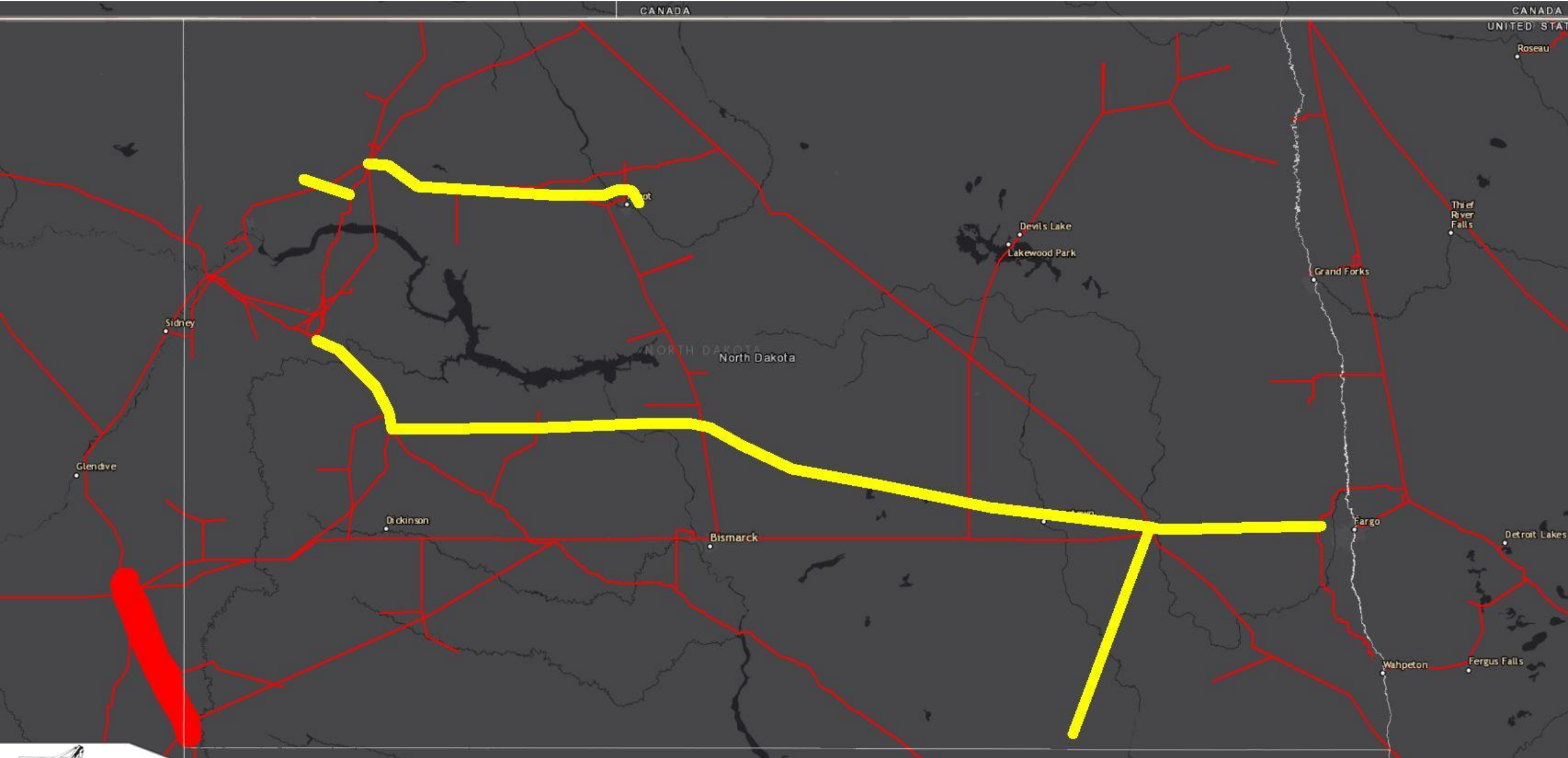
- Non-binding open season April 4 - May 6, 2022
- Binding Open Season: June 1-30, 2023
- Three compressor upgrades in North Dakota
- Reverse the idle Bison Pipeline (30" – 302 Mile)
- Capacity 300,000 Dth/Day (430,000 Offered)
- **May 2026** targeted in-service date
- Fort Union Gas Gathering and Wyoming 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



- ★ Cities
- Bakken East Pipeline Project
- Existing WBI Energy System

# 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

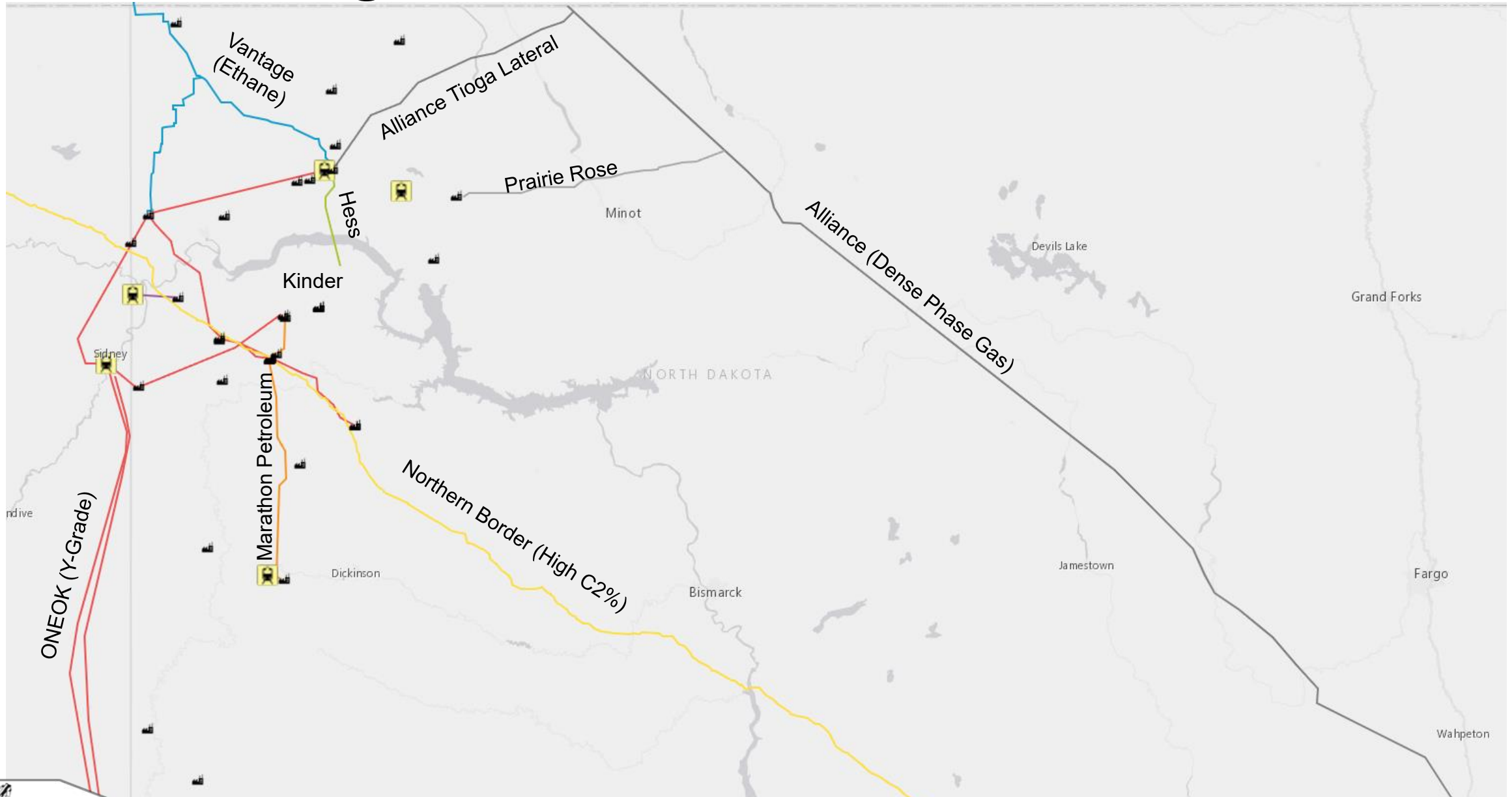
- Non-binding open season Apr 17 – May 23, 2025
- 208 Miles: 30" Pipe
- Proposed Capacity 430,000 Dth/Day
- January 2030 targeted in-service
- Seeking commitments 10yrs or Longer

## 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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