

# Pipeline Authority Monthly Update

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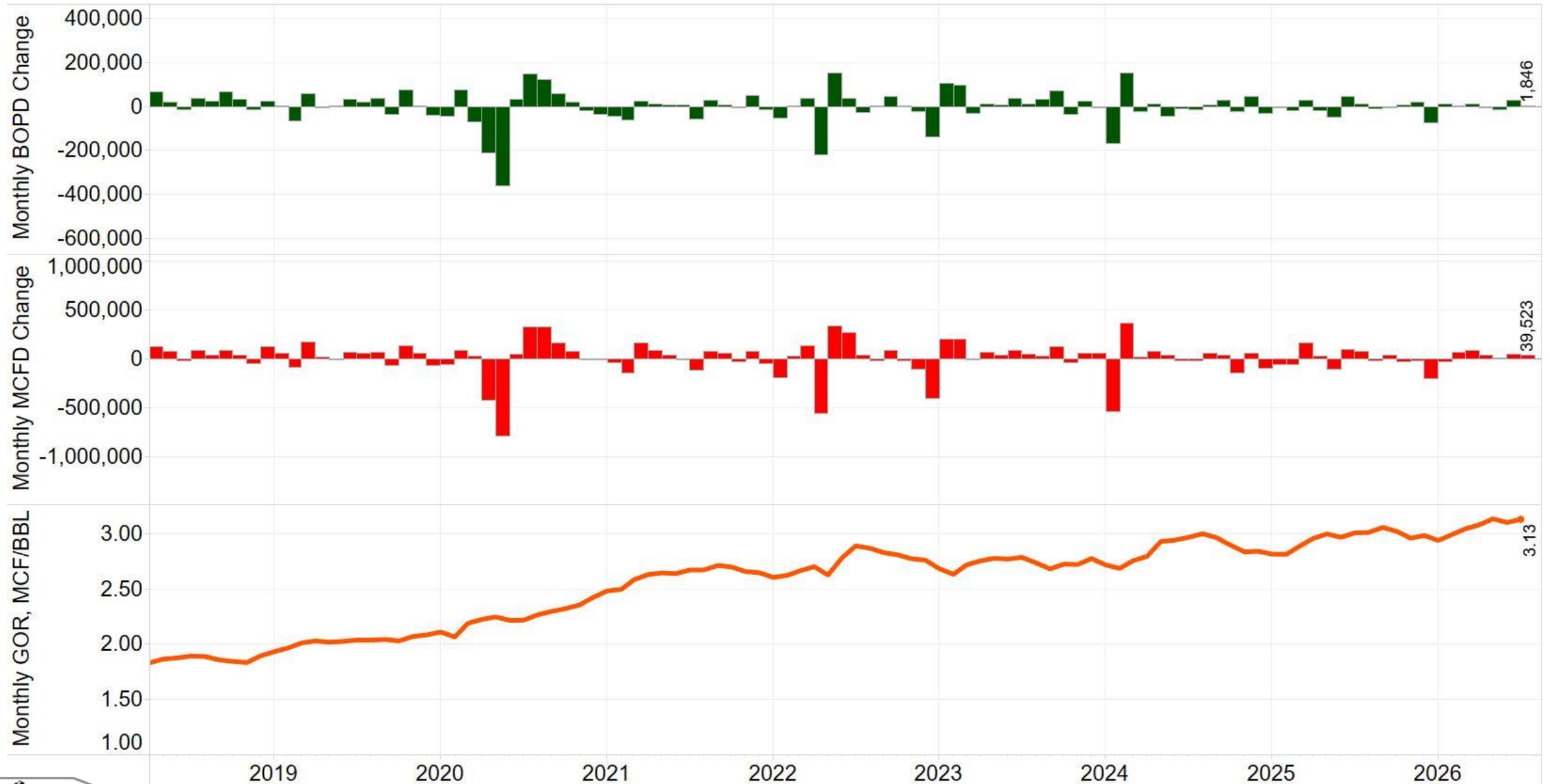
**September 21, 2026**

# US Williston Basin Oil Production - 2026

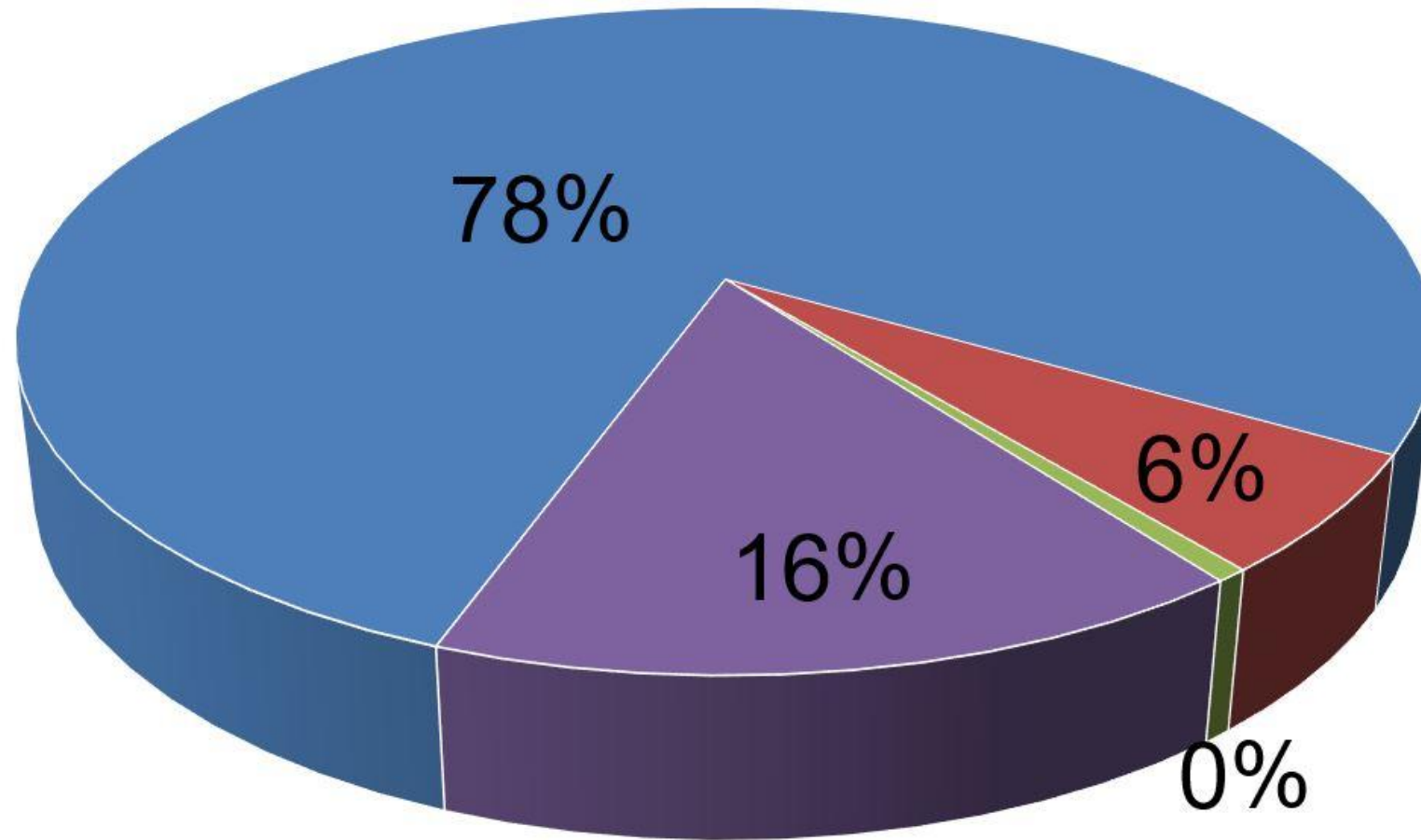
| MONTH     | ND        | Eastern MT* | SD    | TOTAL     |
|-----------|-----------|-------------|-------|-----------|
| January   | 1,130,651 | 72,677      | 2,181 | 1,205,509 |
| February  | 1,133,601 | 74,836      | 2,176 | 1,210,613 |
| March     | 1,142,966 | 75,188      | 2,193 | 1,220,347 |
| April     | 1,141,984 | 71,108      | 2,519 | 1,215,611 |
| May       | 1,125,278 | 67,370      | 2,233 | 1,194,881 |
| June      | 1,154,795 |             | 2,148 |           |
| July      | 1,156,641 |             | 2,057 |           |
| August    |           |             |       |           |
| September |           |             |       |           |
| October   |           |             |       |           |
| November  |           |             |       |           |
| December  |           |             |       |           |



# North Dakota Monthly Production Change



# Estimated Williston Basin Oil Transportation



■ Pipeline Export

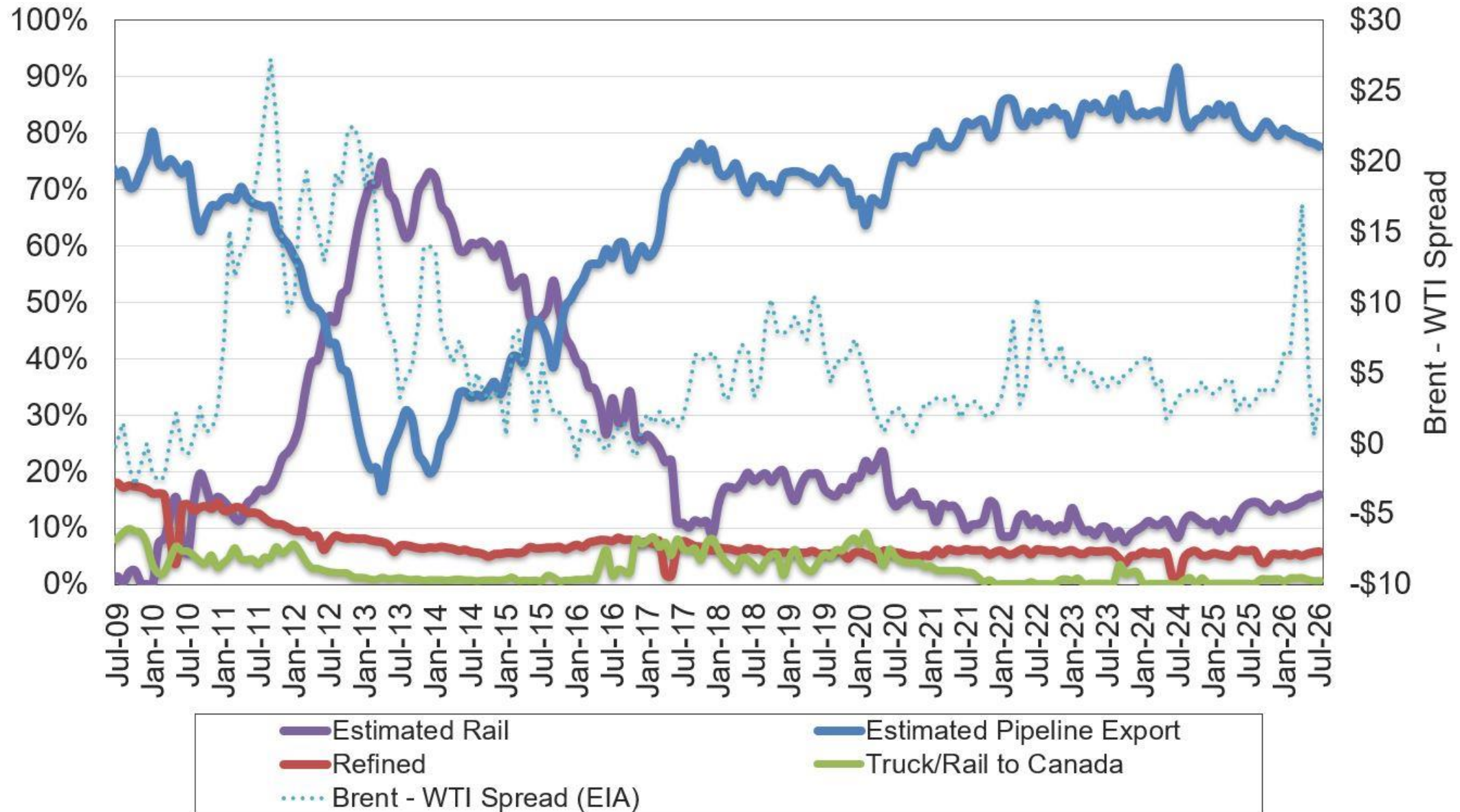
■ Truck/Rail to Canada

■ Refined

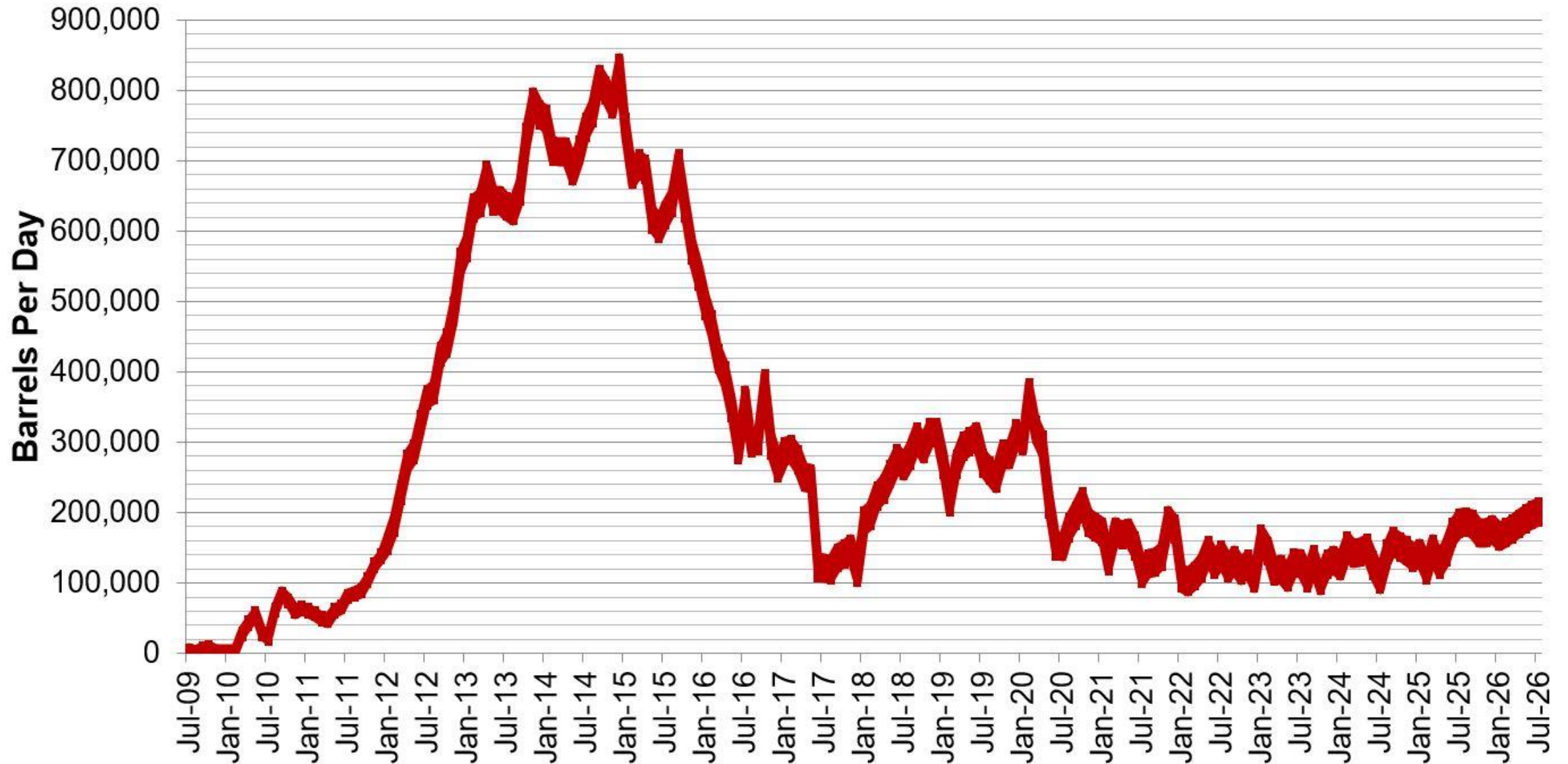
■ Estimated Rail



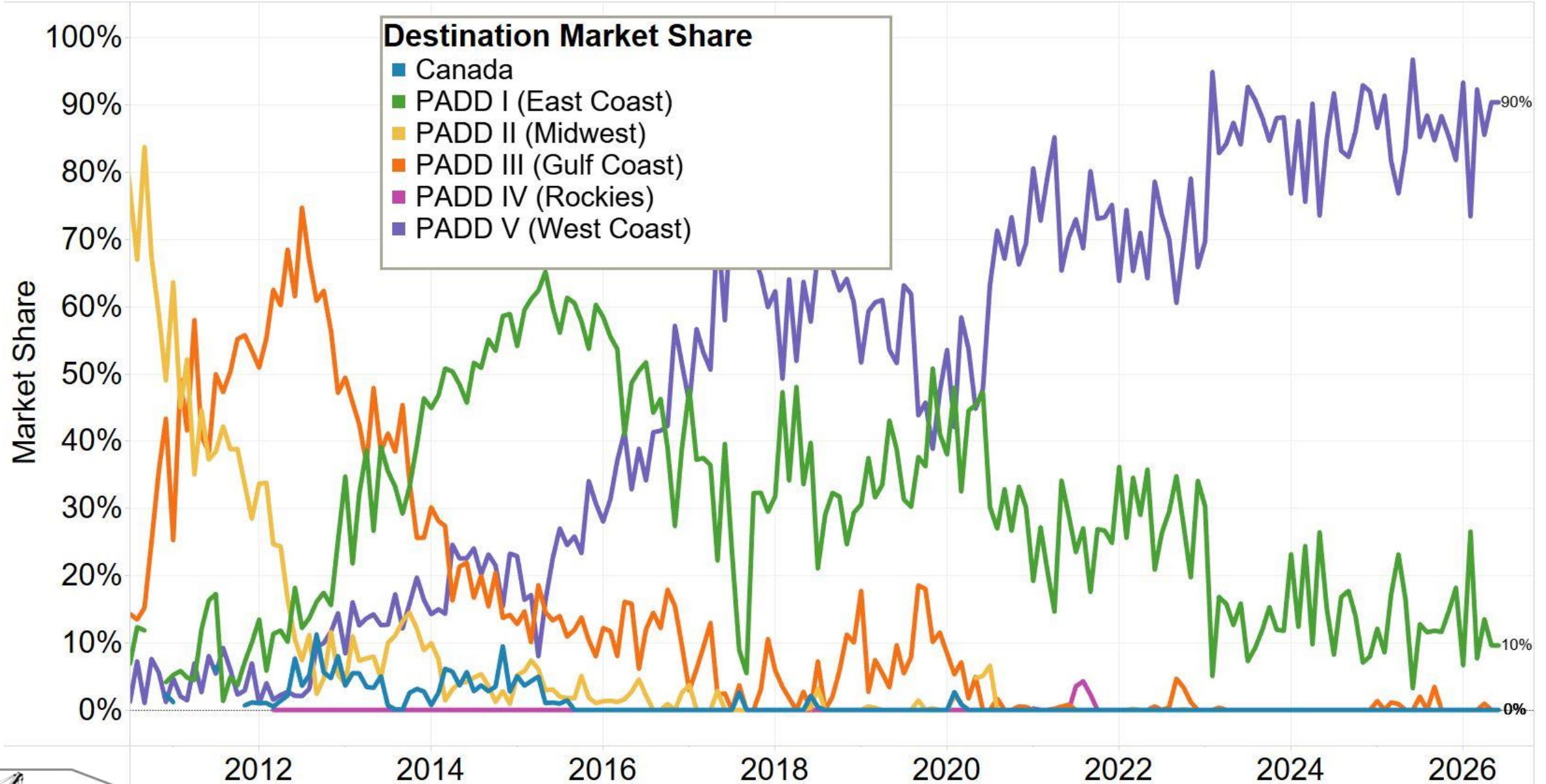
# Estimated Williston Basin Oil Transportation



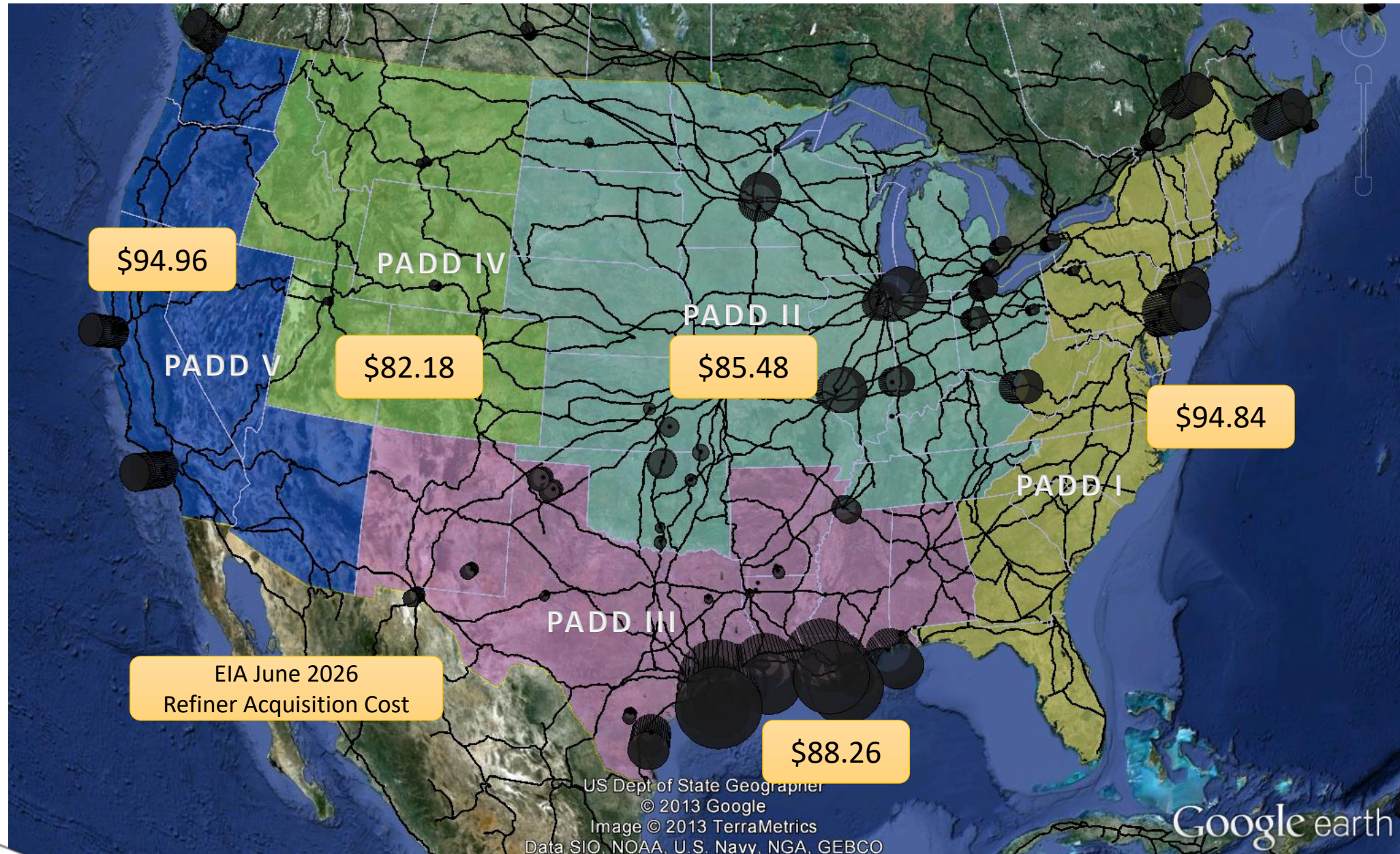
# Estimated ND Rail Export Volumes



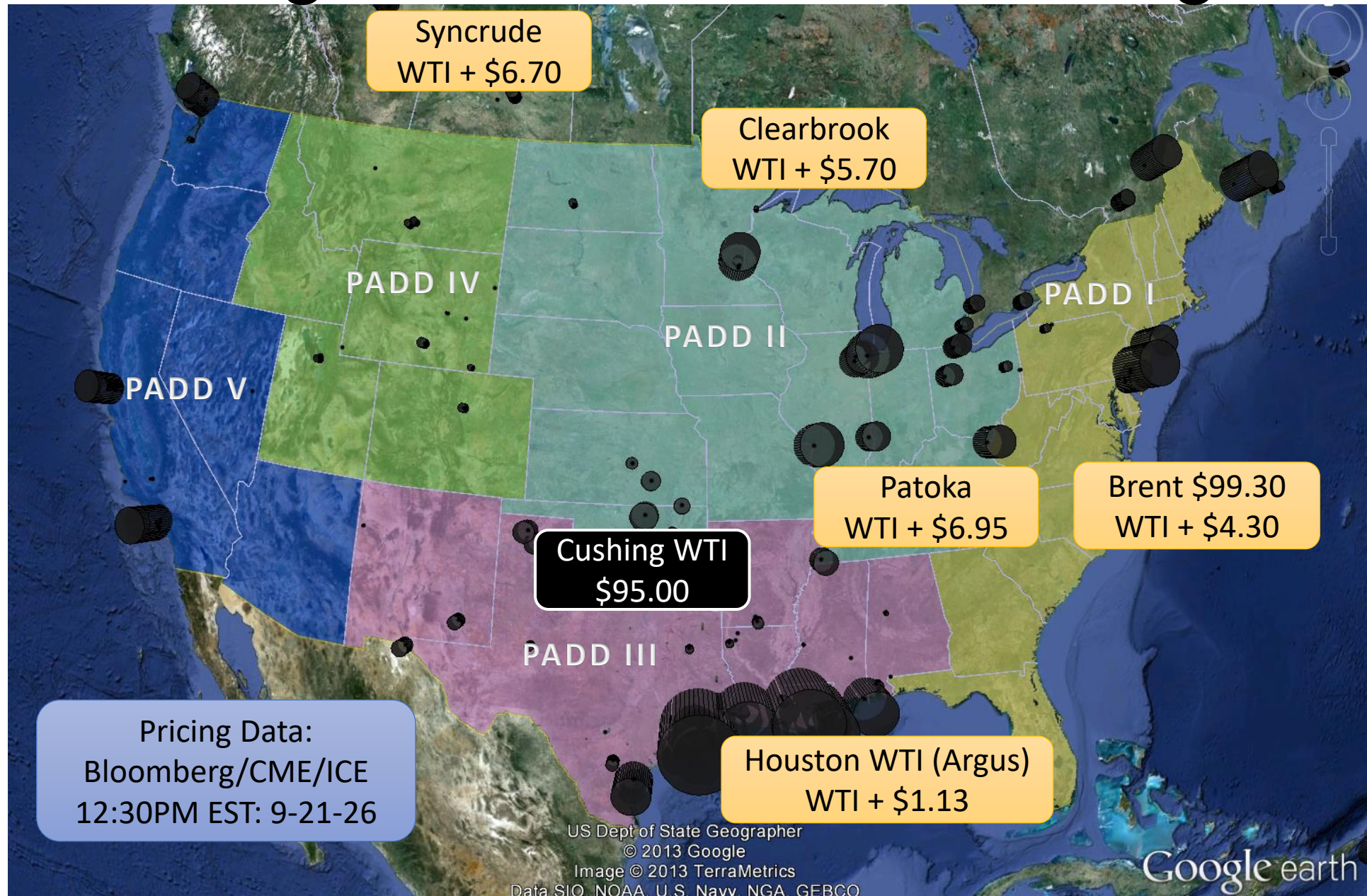
# Rail Destinations Market Share (June 2026)



# Major Rail Lines and Refineries



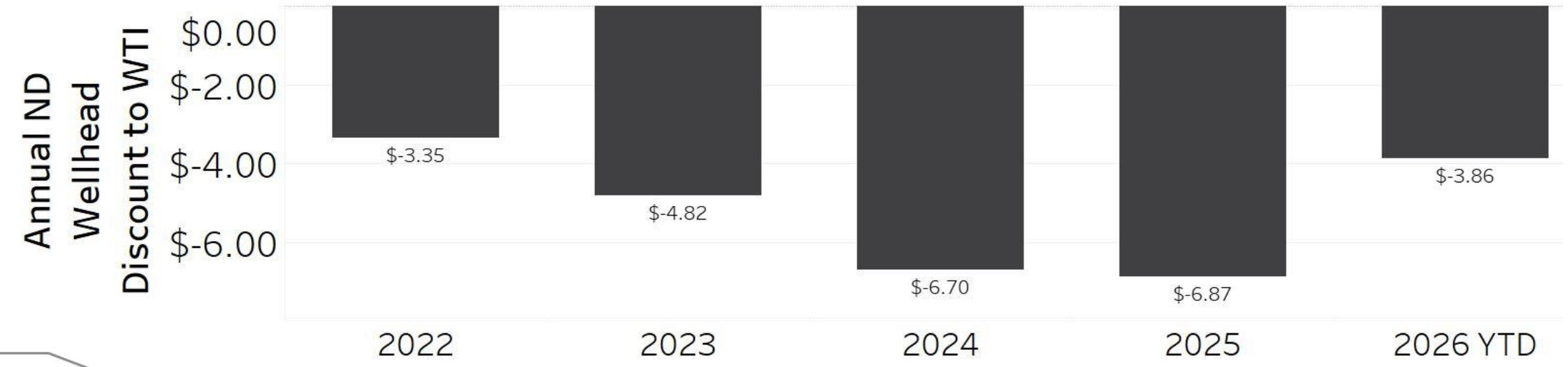
# Major Pricing Benchmarks & Refining Centers



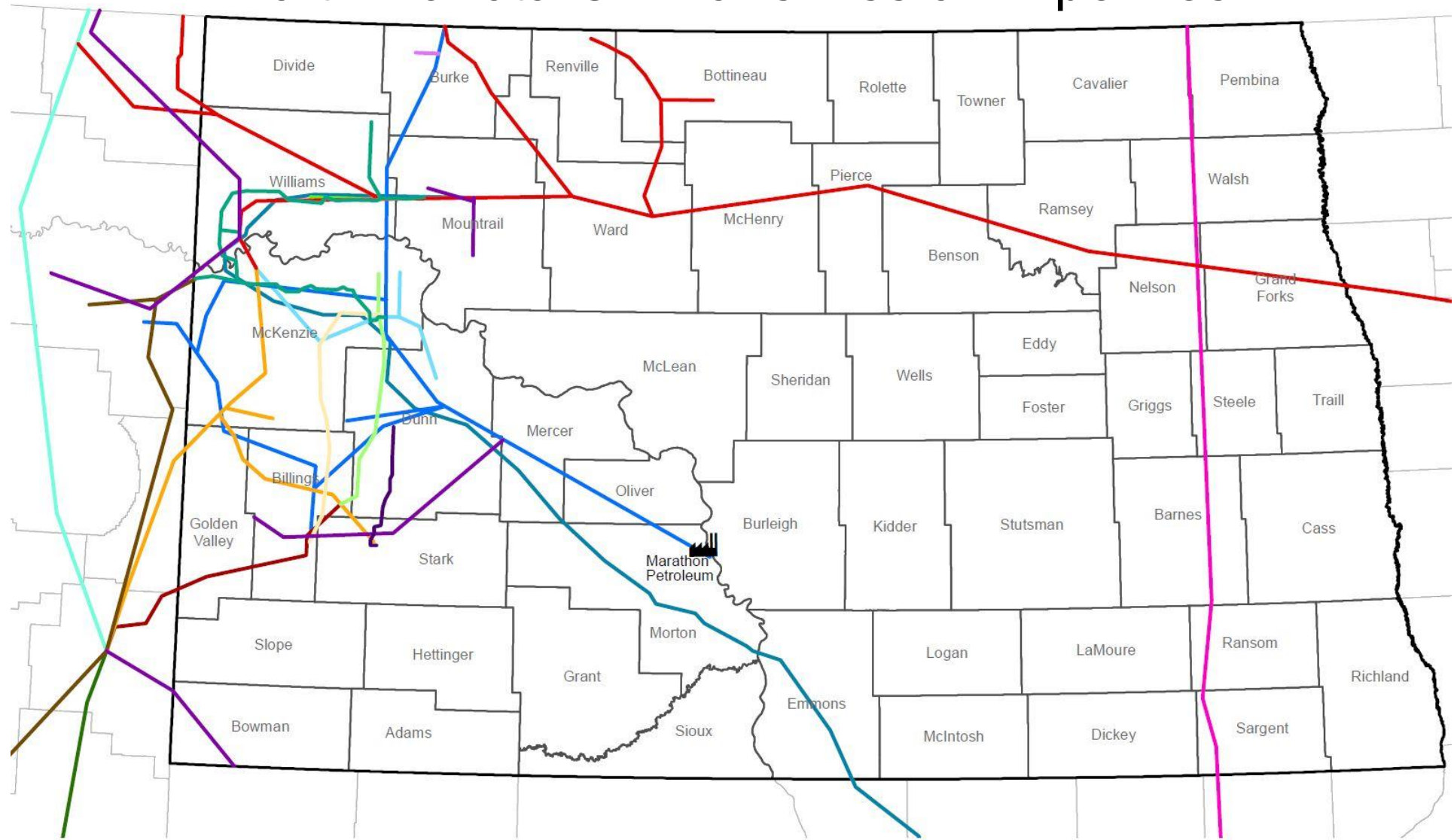
# Average North Dakota Oil “Discount” to WTI



Last Five Years Annual Average



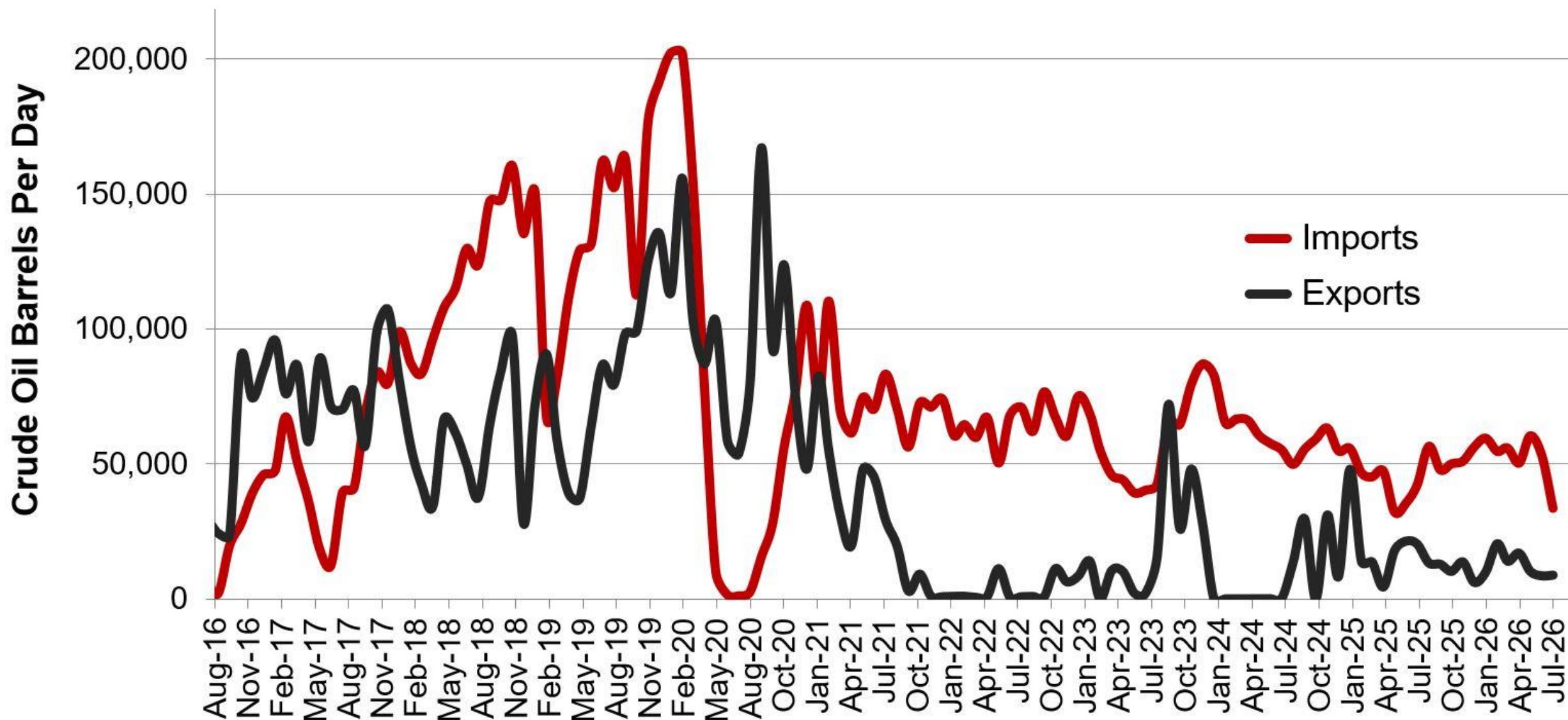
# North Dakota Oil Transmission Pipelines



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



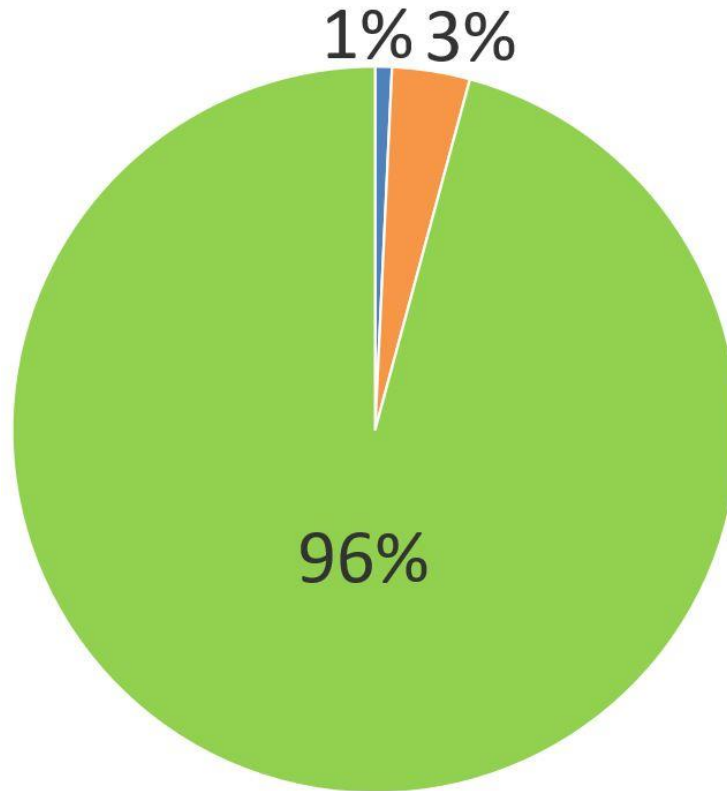
# Williston Basin Imports and Exports with Canada



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.

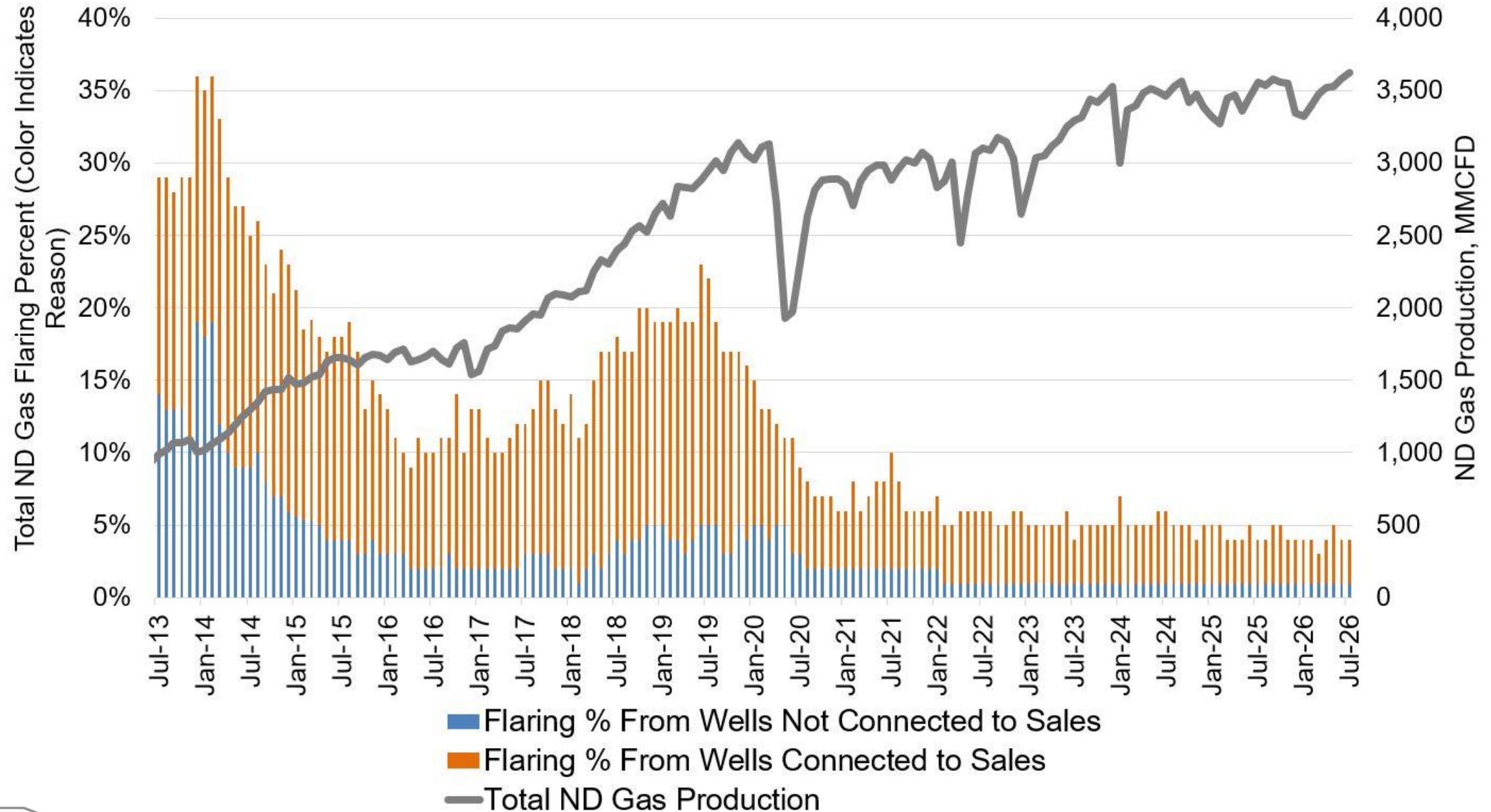
## Simple Terms

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

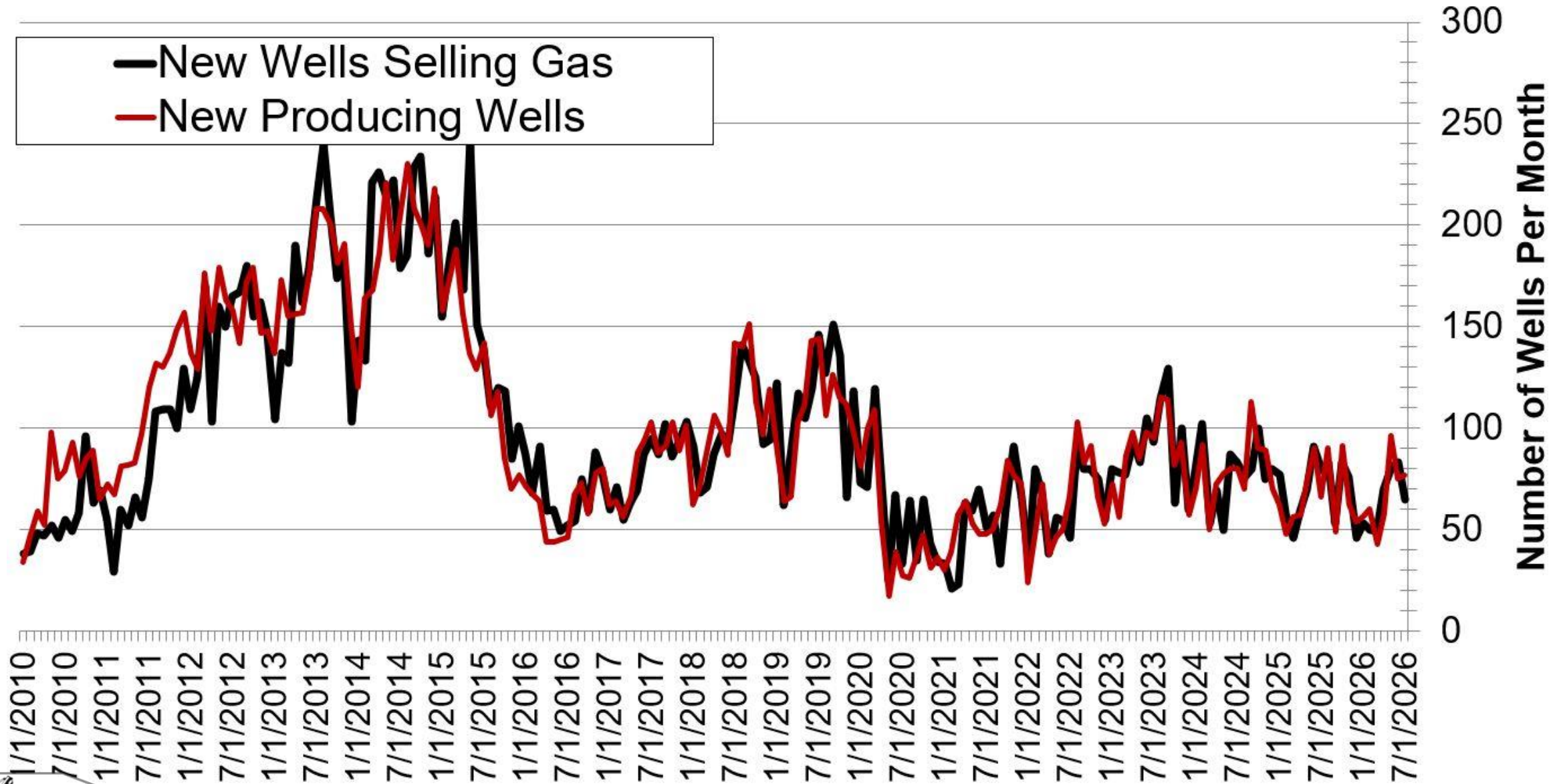
July 2026 Data – Non-Confidential Wells



# Solving the Flaring Challenge

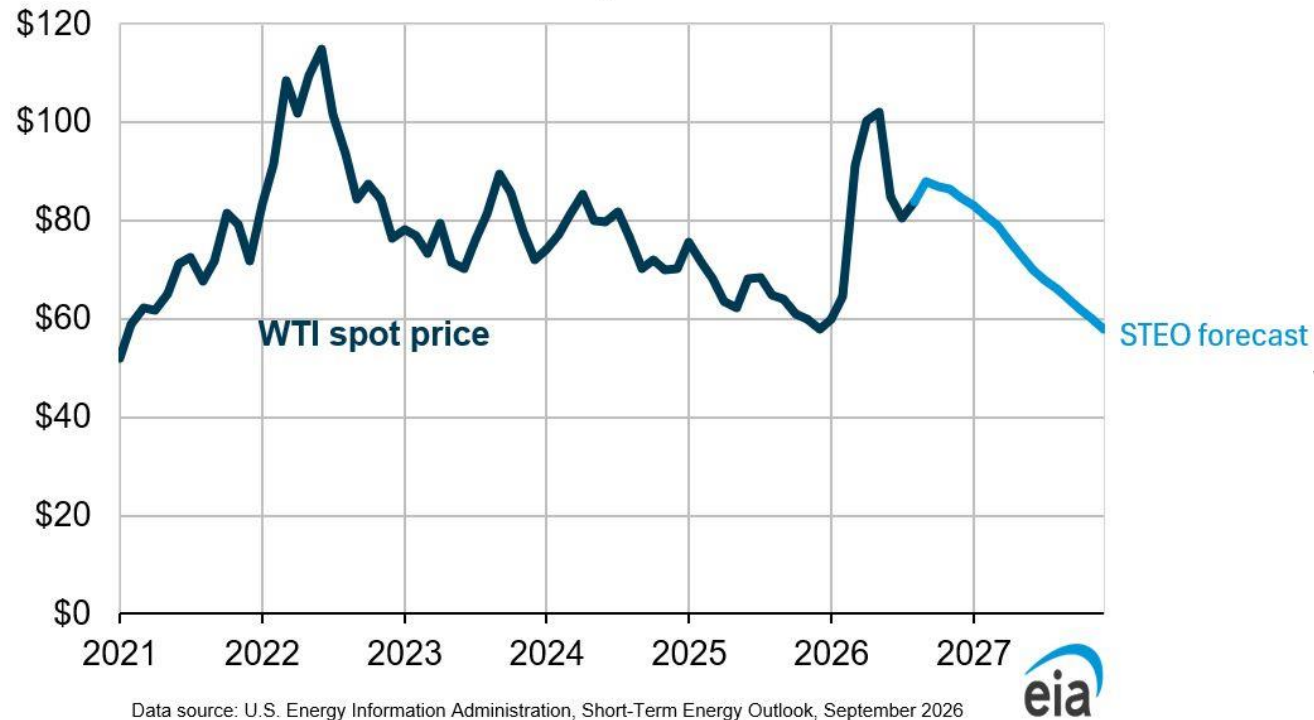


# Solving the Flaring Challenge

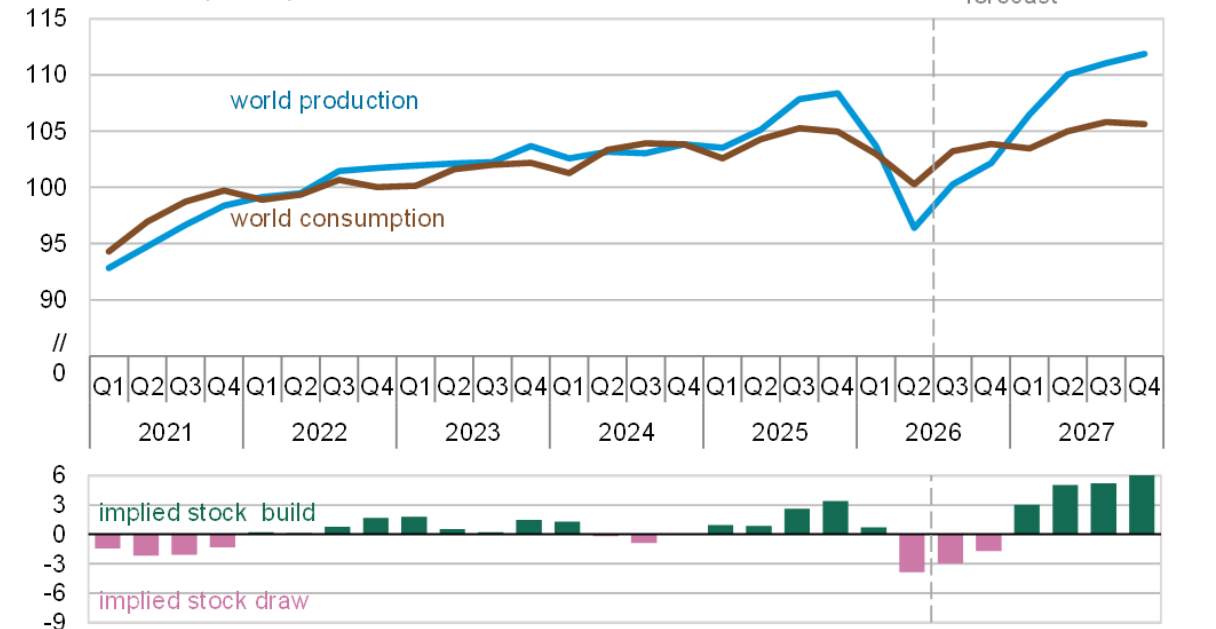


# EIA Oil Price Outlook (September 3, 2026)

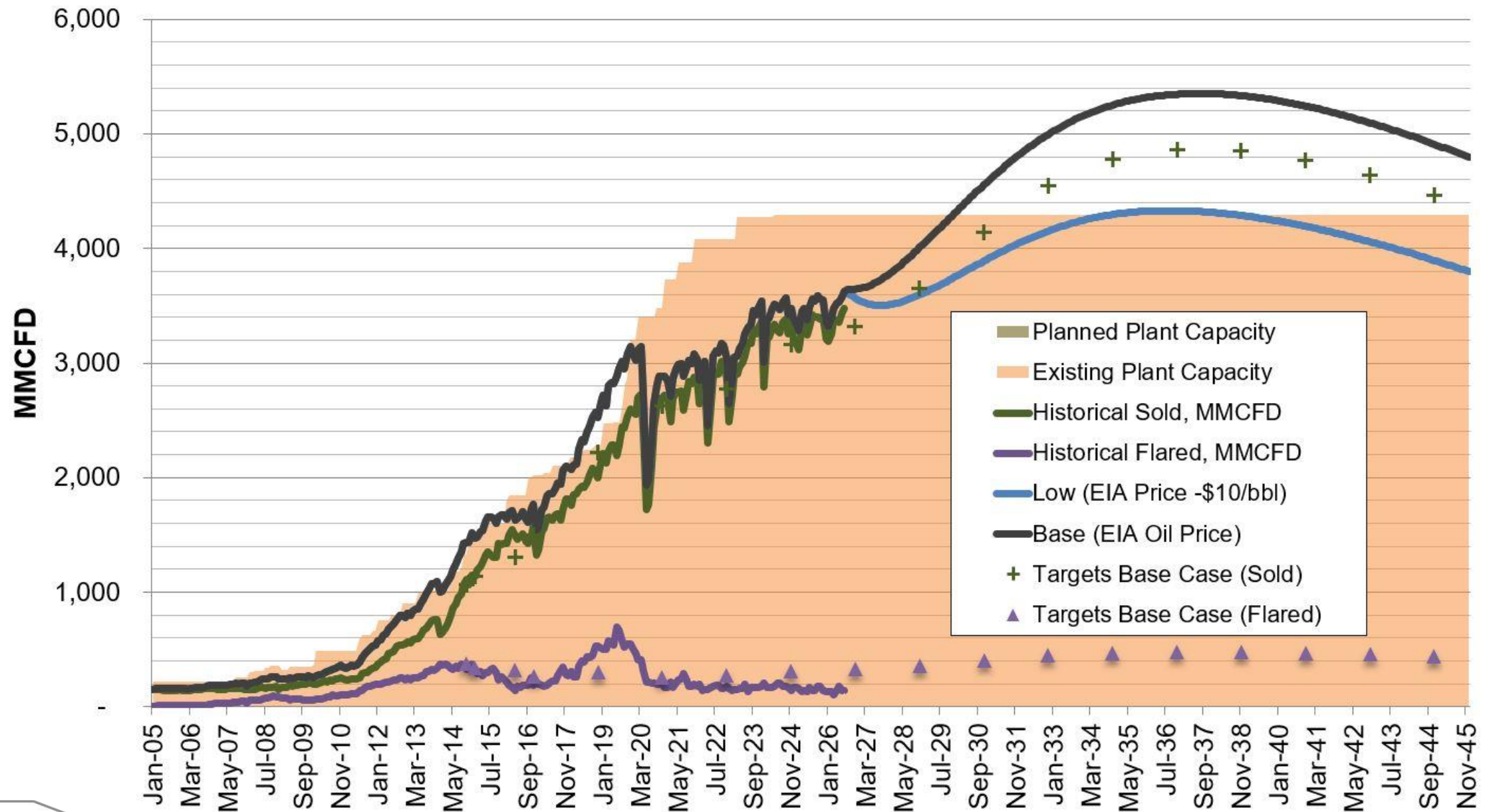
West Texas Intermediate (WTI) crude oil price  
dollars per barrel



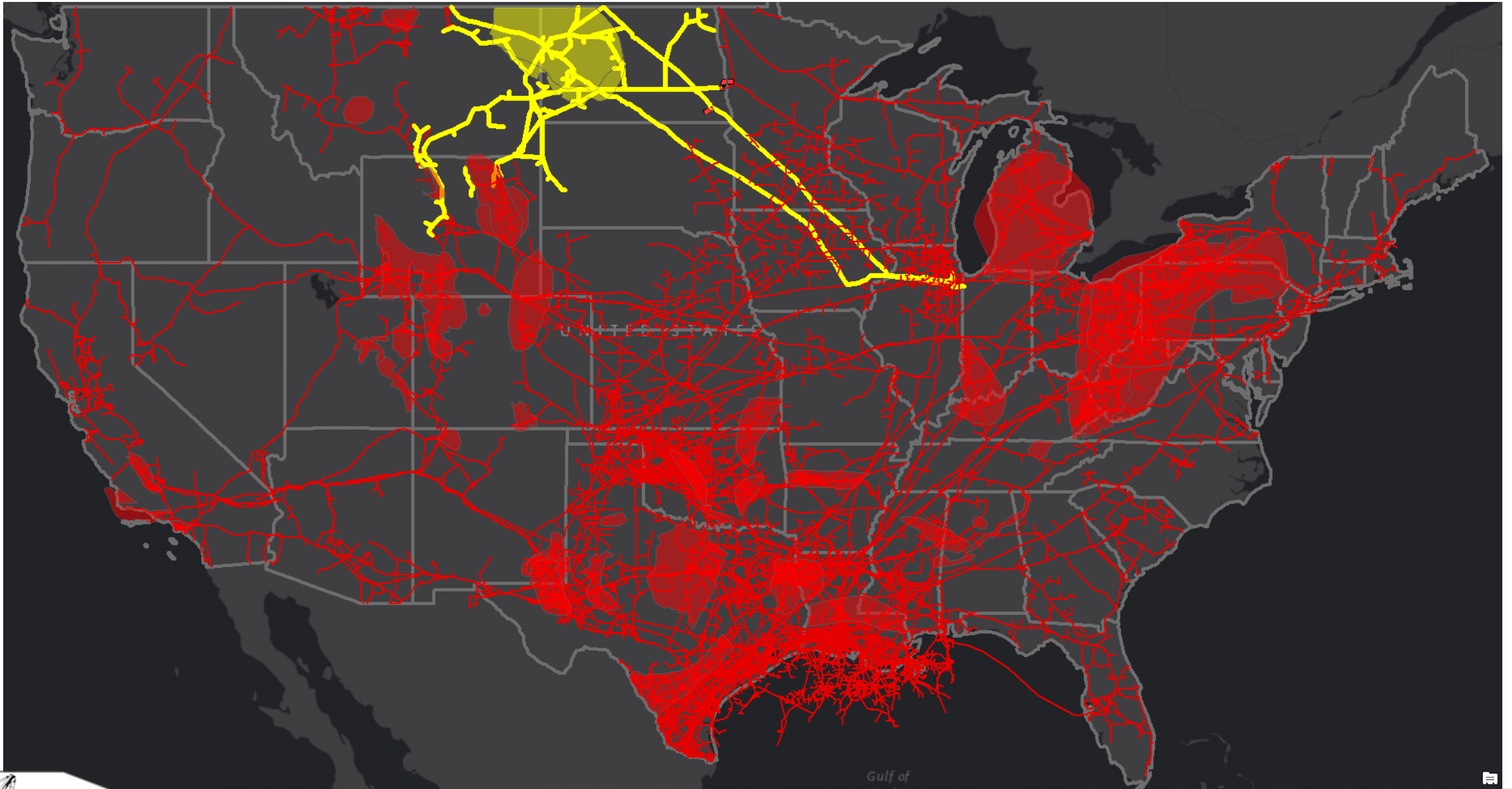
World liquid fuels production and consumption balance  
million barrels per day



# North Dakota Gas Processing Outlook



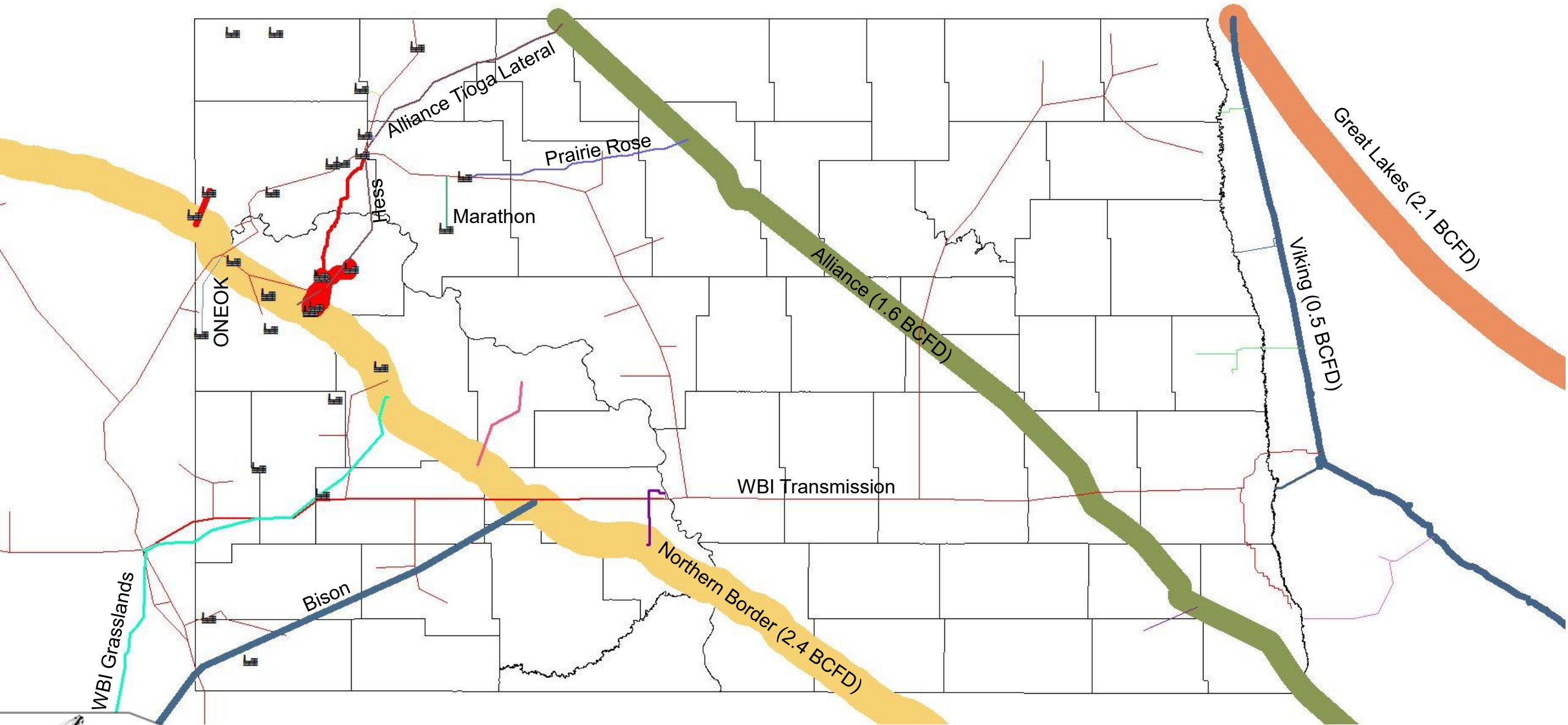
# Bakken Natural Gas Infrastructure



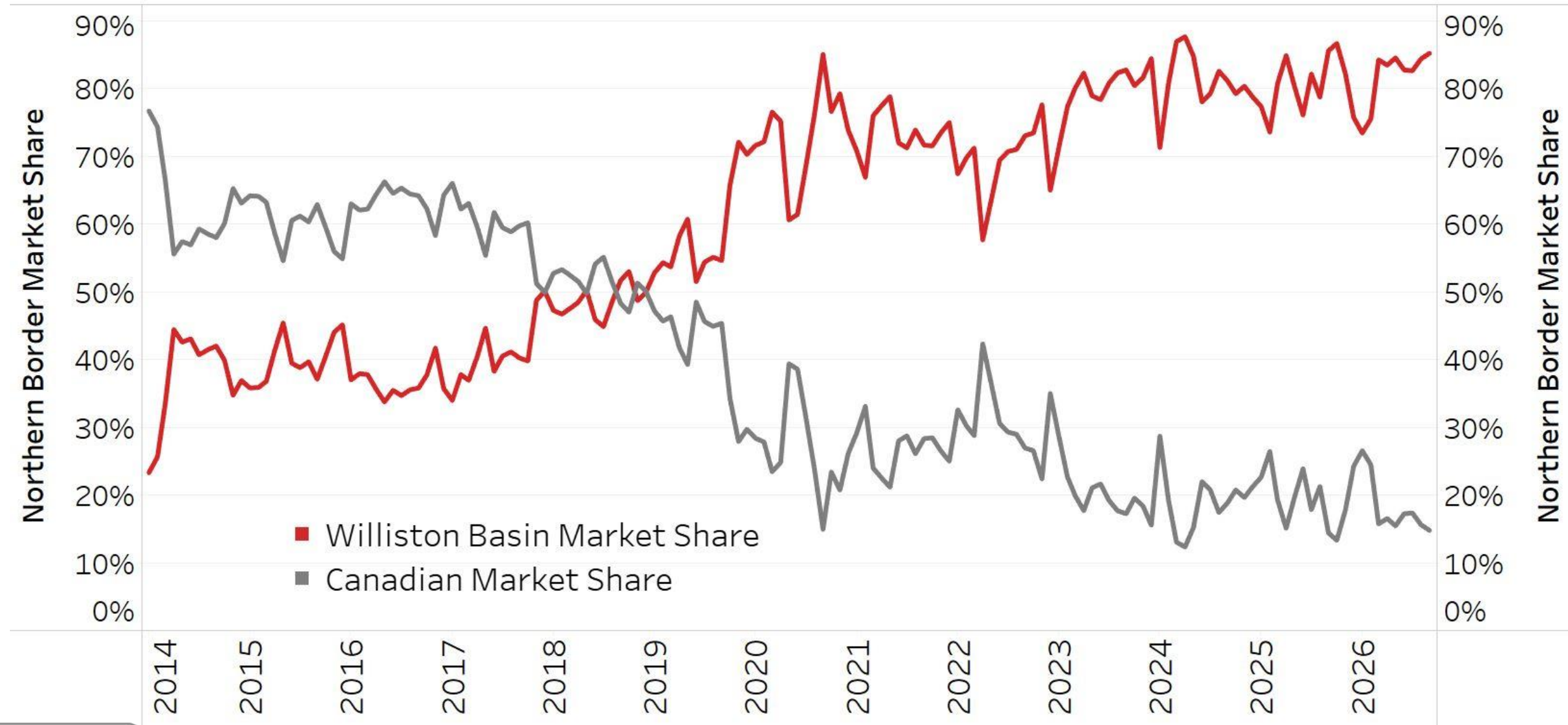
# Major Residue Gas Pipeline Infrastructure



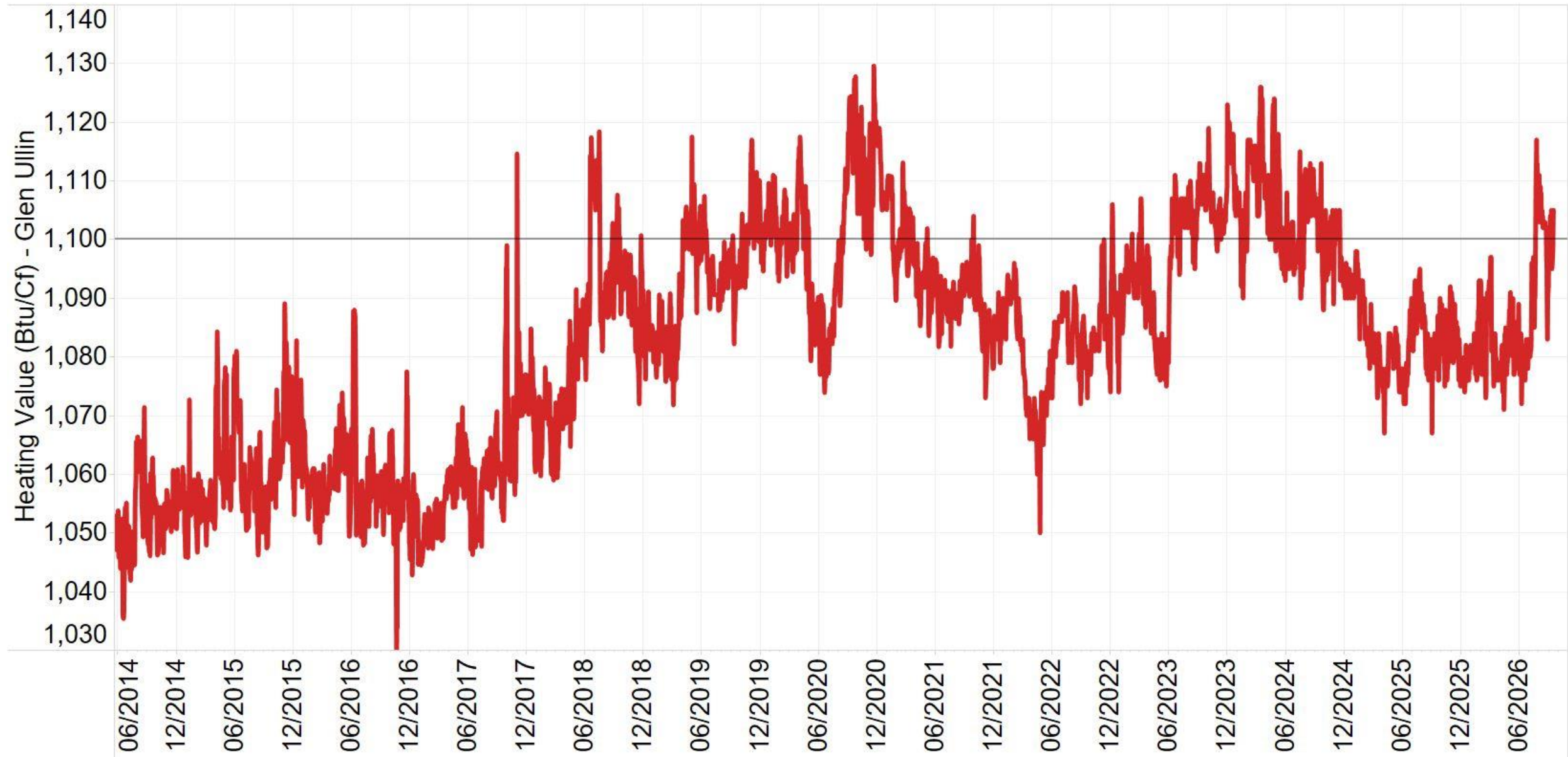
# Residue Gas Pipeline Capacity Visualization



# Northern Border Pipeline Market Share



# Northern Border BTU at Glen Ullin, ND



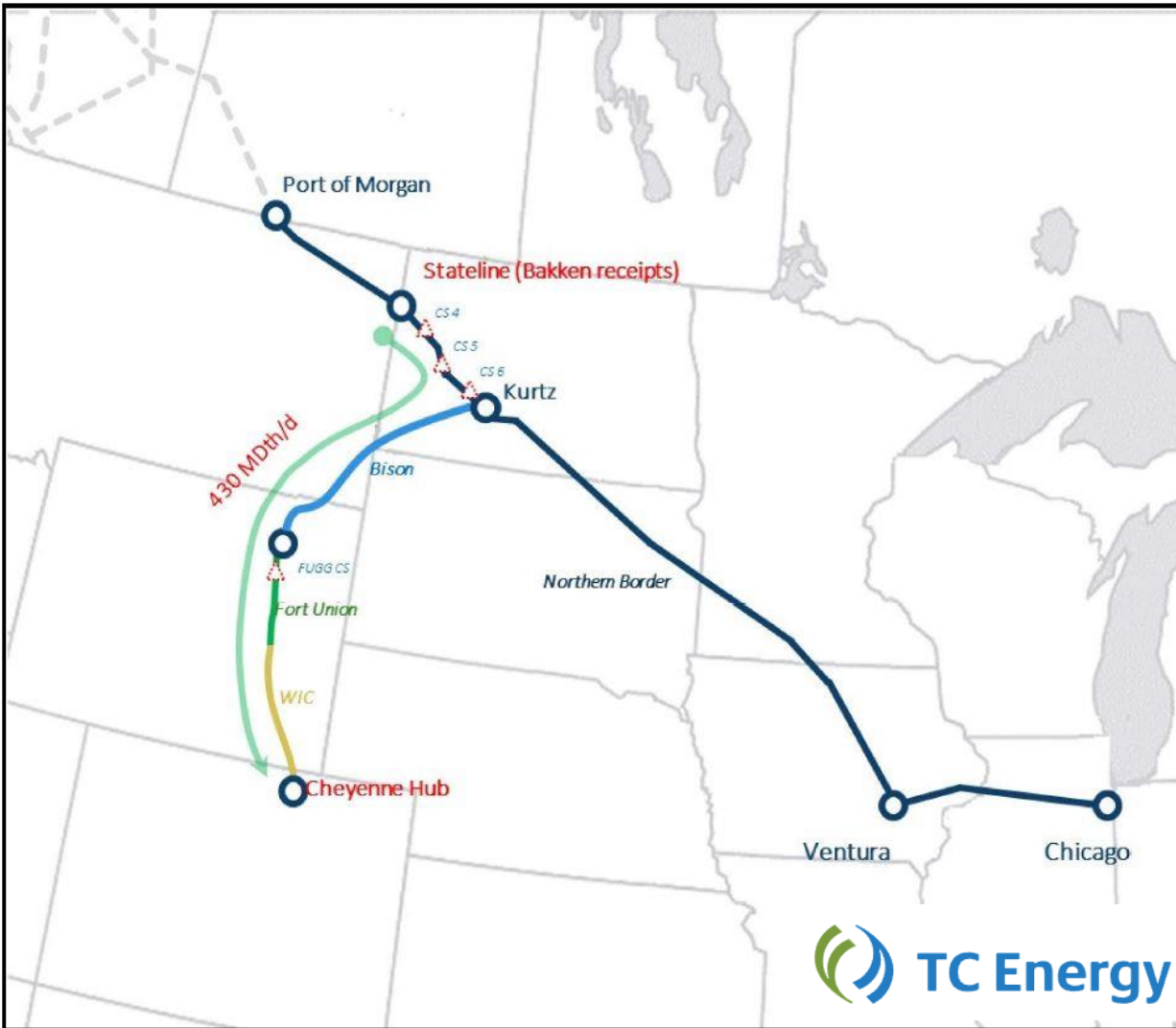
# TC Energy / Kinder Morgan: Bakken xPress Project

## Project Highlights

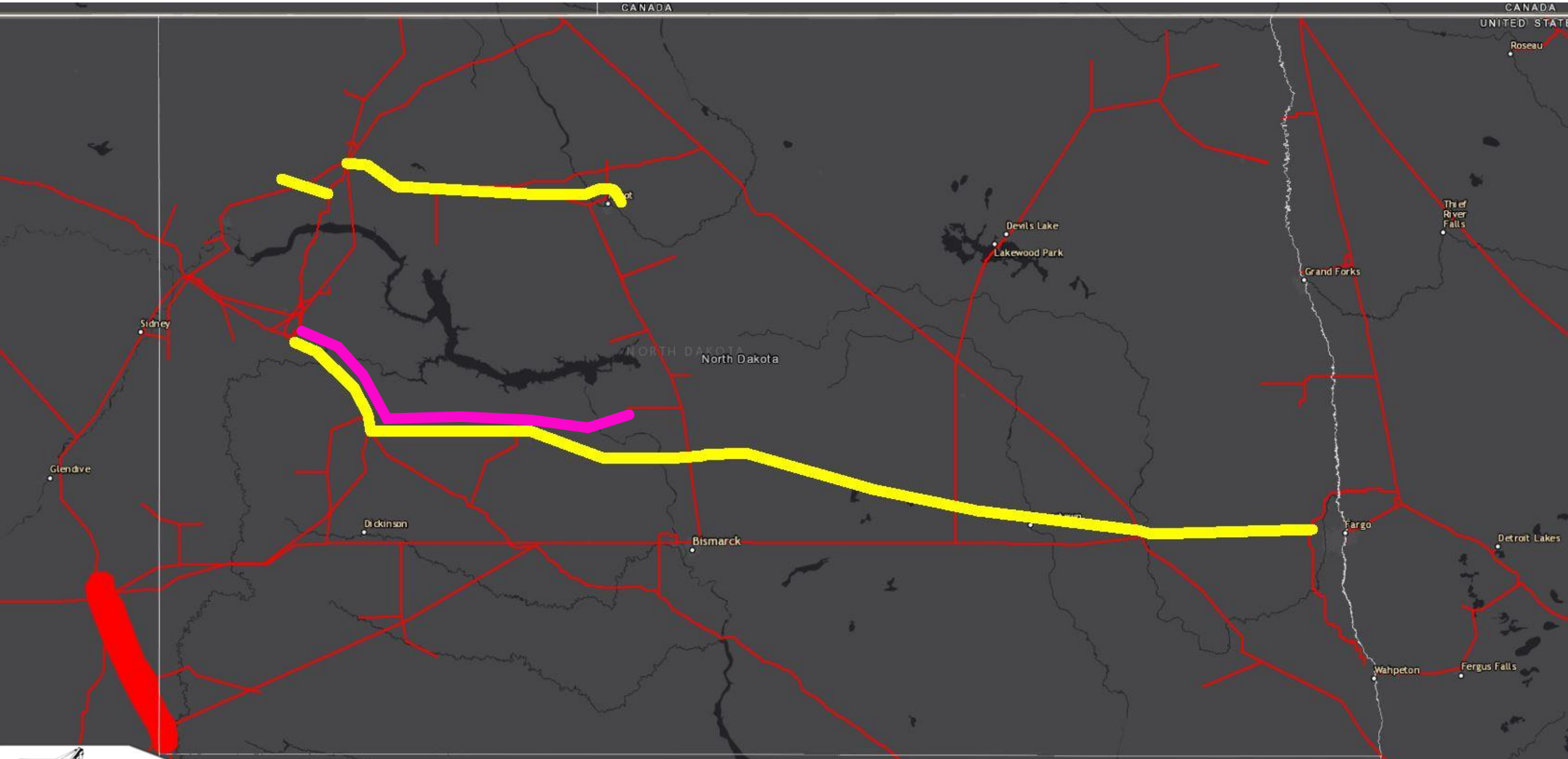
- Non-binding open season April 4 - May 6, 2022
- Binding Open Season: June 1-30, 2023
- Three compressor upgrades in North Dakota
- Reverse the idle Bison Pipeline (30" – 302 Mile)
- Capacity 300,000 Dth/Day (430,000 Offered)
- May 2026 targeted in-service date **(DELAYED)**
- Fort Union Gas Gathering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

## Proposed Rates

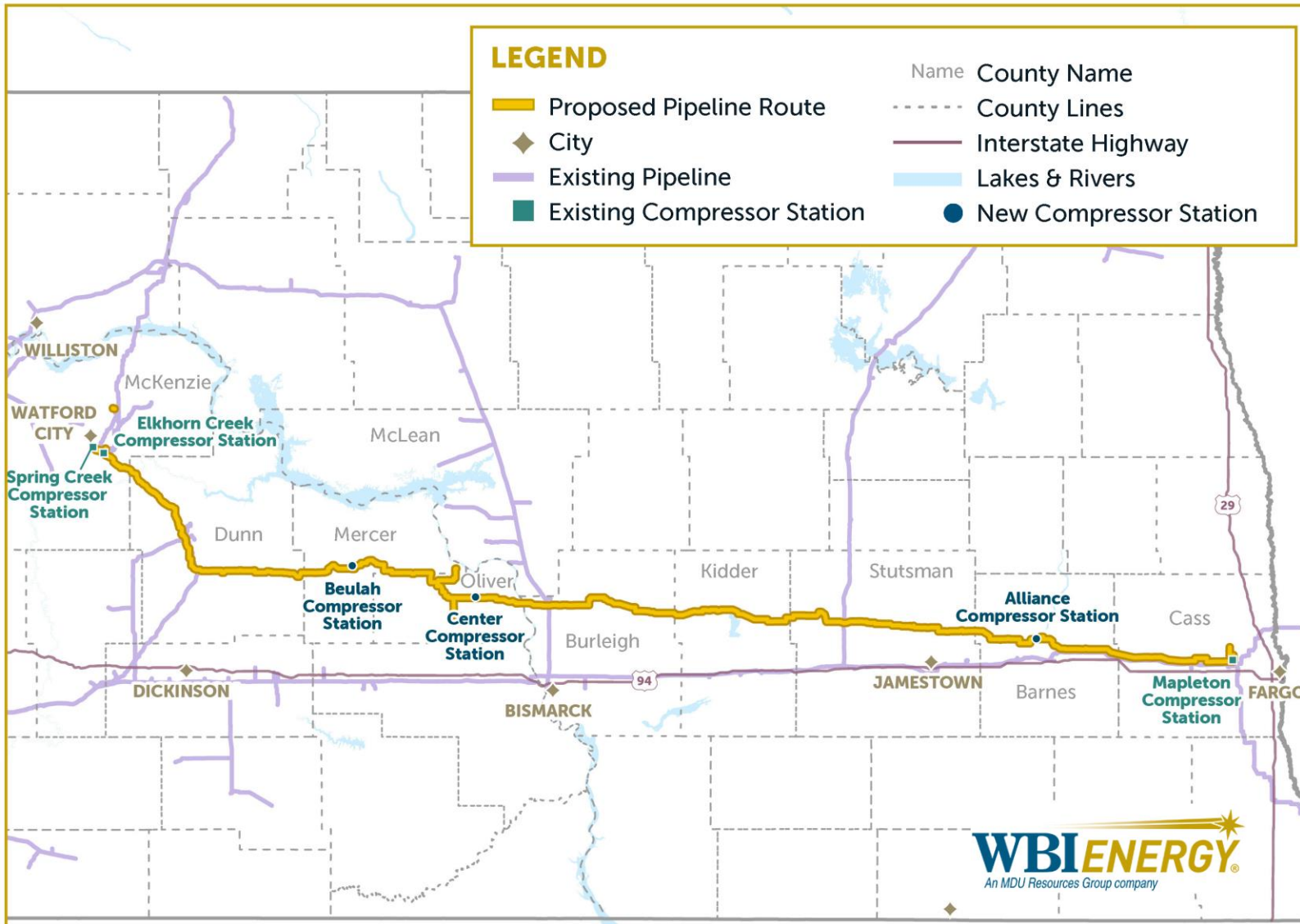
- NBPL/Bison \$0.45/Dth + Fuel/Elec to WIC/FUG Interconnect
- WIC/FUG to Cheyenne \$0.30/Dth + Fuel/Elec



# 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
- 134 Miles: 42" Pipe
- 162 Miles: 36" Pipe
- 57 Miles: 30" Pipe
- 20 Miles: 20"-30" Pipe (Laterals)
- Compression: ~89,000 HP
- 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



# Bakken East Major Milestone Schedule



# 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

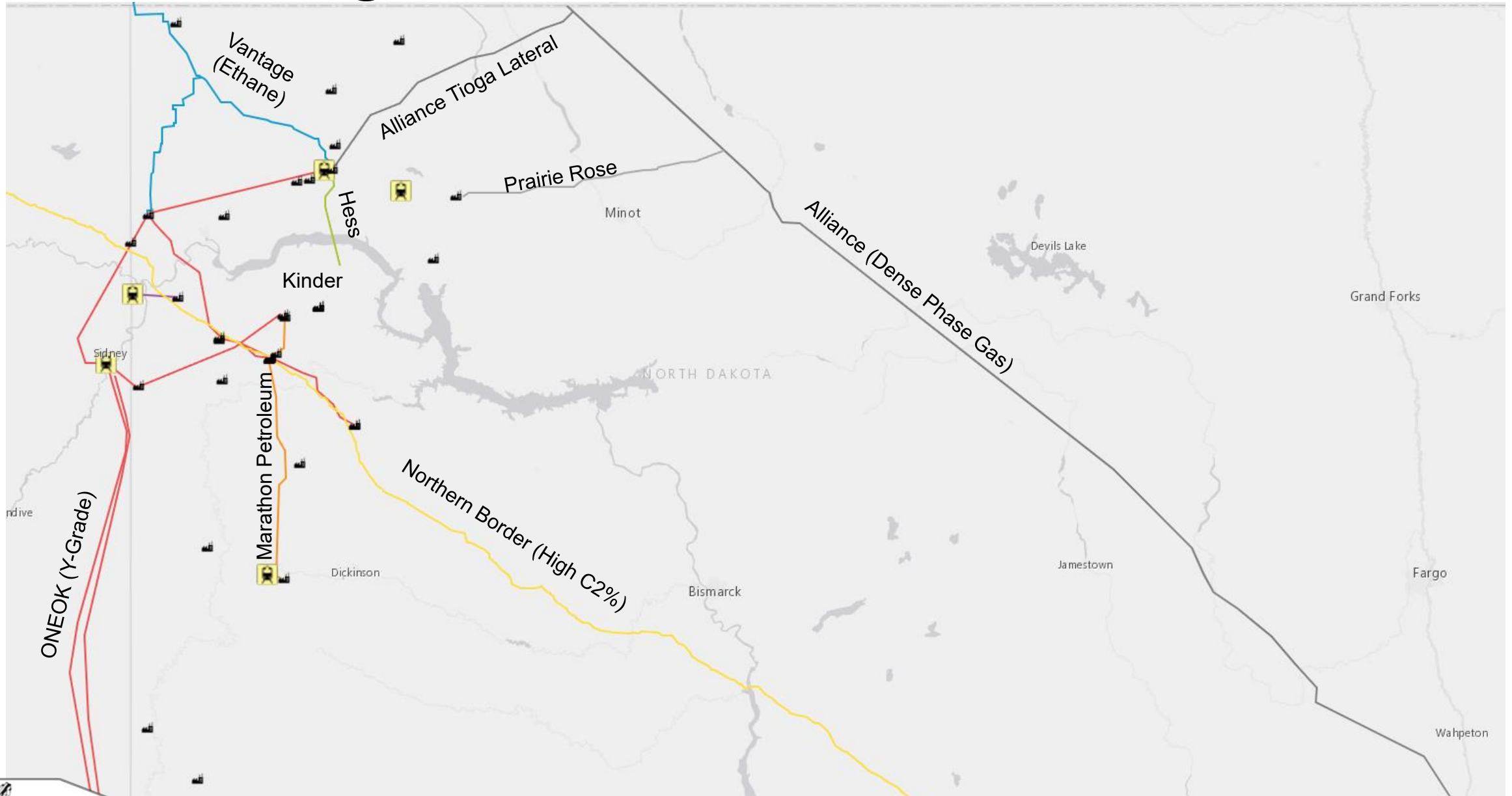
- Non-binding open season Apr 17 – May 23, 2025
- 208 Miles: 30" Pipe
- Proposed Capacity 430,000 Dth/Day
- January 2030 targeted in-service
- Seeking commitments 10yrs or Longer

## 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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