North Dakota Pipeline Authority
Central Power Annual Meeting
March 28, 2012 – Minot, ND
205 Active Rigs – March 27, 2012
North Dakota Crude Oil

Barrels Per Day

Production forecast is for visual demonstration purposes only and should not be considered accurate for any near or long term planning.
Production forecast is for visual demonstration purposes only and should not be considered accurate for any near or long term planning.
Challenges*

1) Moving oil out of the Williston Basin
2) Moving oil within the Williston Basin

*Modified from Bridger and Belle Fourche Pipelines
Williston Basin Oil Transportation

January 2012 Estimates

- Pipeline Export: 58%
- Tesoro Refinery: 10%
- Truck to Canadian Pipelines: 7%
- Estimated Rail: 25%

January 2012 Estimates
Existing & Planned Rail Locations

**Existing**
1) Stampede
2) Donnybrook
3) Ross – Plains
4) Stanley – EOG
5) Minot – ND Port Services
6) Dore
7) New Town – Dakota Transport Solutions
8) Zap – Basin Transload
9) Dickinson – BOE
10) Trenton – Savage
12) Tioga – Hess

**Planned**
1) Epping – Rangeland
2) Berthold – Enbridge
3) Fryburg – Great Northern
Production forecast is for visual demonstration purposes only and should not be considered accurate for any near or long term planning.

*Projects still in the proposed or internal review process
High-Low Rail Estimate, BOPD

Barrels Per Day

Jun-08  Sep-08  Dec-08  Mar-09  Jun-09  Sep-09  Dec-09  Mar-10  Jun-10  Sep-10  Dec-10  Mar-11  Jun-11  Sep-11  Dec-11
Challenges*

1) Moving oil out of the Williston Basin
2) Moving oil within the Williston Basin

*Modified from Bridger and Belle Fourche Pipelines
Reducing Truck Traffic

Four Bears Pipeline

77 miles – 12”
105,000 BOPD Capacity

Impact: 50,000-75,000 Truck Miles Per Day
Reducing Truck Traffic

Enbridge Station Upgrades

Four Stations -
New Truck Lots and Tankage

Impact: 50,000-143,000 Truck Miles Per Day
Reducing Truck Traffic

Enbridge Sanish Pipeline

- 36 miles - 12"
- 6 miles – 10"
- 60,000 BOPD Capacity
- 300 Truck Loads Per Day
- Complete: Q4 2013
Brent–WTI Crude Pricing

WTI – Cushing, OK

Brent – “World” Oil Price
Natural Gas Projects
Homes Heated By ND Natural Gas

Based on Average US Home Natural Gas Consumption
Natural Gas Pipelines

- Williston Basin Interstate Pipeline
- Alliance Pipeline
- Northern Border Pipeline

Flows:
- 2.37 BCFD
- 1.51 BCFD
Natural Gas Study
Montana Bakken Production

Source: EPRINC – Left Axis Oil, BOPD – Right Axis Gas, MCFD
Pipeline Safety

Know what's below. Call before you dig.
North Dakota Pipeline Authority

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