North Dakota Pipeline Authority
Lignite Energy Council Contractor/Supplier Meeting
April 18, 2012 – Bismarck, ND
206 Active Rigs – April 17, 2012
North Dakota Crude Oil
Top Four States

Source: U.S. Energy Information Administration
Production forecast is for visual demonstration purposes only and should not be considered accurate for any near or long term planning.
Forecasting Williston Basin Oil Production, BOPD

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
Williston Basin Oil Production & Export Capacity, BOPD

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
North Dakota Crude Oil Pipelines

Challenges*

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

*Modified from Bridger and Belle Fourche Pipelines
Crude Oil Gathering
North Dakota Crude Gathering

- Truck
- Pipeline
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
Brent-WTI Crude Pricing
Natural Gas Projects
Homes Heated By ND Natural Gas

Based on Average US Home Natural Gas Consumption
First Time Gas Sales Per Month
Natural Gas Study
Montana Bakken Production

Source: EPRINC – Left Axis Oil, BOPD – Right Axis Gas, MCFD
Gas Transmission Pipelines

2.37 BCFD

1.51 BCFD

Alliance  Hess  Pecan  Williston Basin
Bear Paw  Northern Border  Whiting  Gas Processing Plant
Pipeline Safety

811

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

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