North Dakota Petroleum Council
Annual Meeting

Justin J Kringstad
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North Dakota Pipeline Authority
Natural Gas Update

Production
- Technology
- Markets

Gathering
- Capacity
- Connections

Processing
- Capacity
- Location

Transmission
- Dry Gas
- Natural Gas Liquids
Statewide Gas Performance

~12% Improvement Over 2017
North Dakota Gas Production Forecast
Assumes Current Technology – Enhanced Oil Recovery Not Included
Natural Gas Update

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Solving the Flaring Challenge

**Simple Terms**

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

**GREEN** – % of gas captured and sold
**Blue** – % flared from zero sales wells
**Orange** – % flared from wells with at least one mcf sold.

Statewide

- 78%
- 17%
- 5%

July 2019 Data – Non-Confidential Wells
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Major Gas Pipeline and Processing Infrastructure
Northern Border Pipeline

*Data Source: Northern Border IPS*
Northern Border BTU at Glen Ullin, ND

*Data Source: Northern Border IPS*
Northern Border Pipeline Market Share

- Canadian Market Share
- Williston Basin Market Share

~1,150+ BTU
~1,035 BTU
Case 1: Ethane Capture - NB Net 1,100 BTU - ~80 mbpd C2 Capture Required

Zero Flow From Canada

200,000 MMBTU From Canada

400,000 MMBTU From Canada

*Assumes Equivalent Net Replacement of 1,035 Canadian Gas
Solving the Flaring Challenge
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Regional NGL Infrastructure

Kinder
North Dakota Pipeline Authority
Marathon Petroleum

Vantage (Ethane)
Alliance Tioga Lateral
Prairie Rose
Alliance (Dense Phase Gas)

ONEOK (Y-Grade)
Northern Border (High C2%)
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