



July 2023 Monthly Update
North Dakota Pipeline Authority
Justin J. Kringstad
July 14, 2023

US Williston Basin Oil Production - 2022

MONTH	ND	Eastern MT*	SD	TOTAL
January	1,091,931	51,895	2,709	1,146,535
February	1,095,503	51,175	2,742	1,149,420
March	1,129,936	54,768	2,709	1,187,413
April	908,697	54,121	2,338	965,156
May	1,062,228	53,276	2,648	1,118,152
June	1,099,366	63,256	2,764	1,165,386
July	1,073,624	60,614	2,774	1,137,012
August	1,075,801	60,587	2,756	1,139,144
September	1,126,138	58,103	2,679	1,186,920
October	1,122,122	54,284	2,621	1,179,027
November	1,098,415	57,734	2,682	1,158,831
December	957,864	56,738	2,199	1,016,801

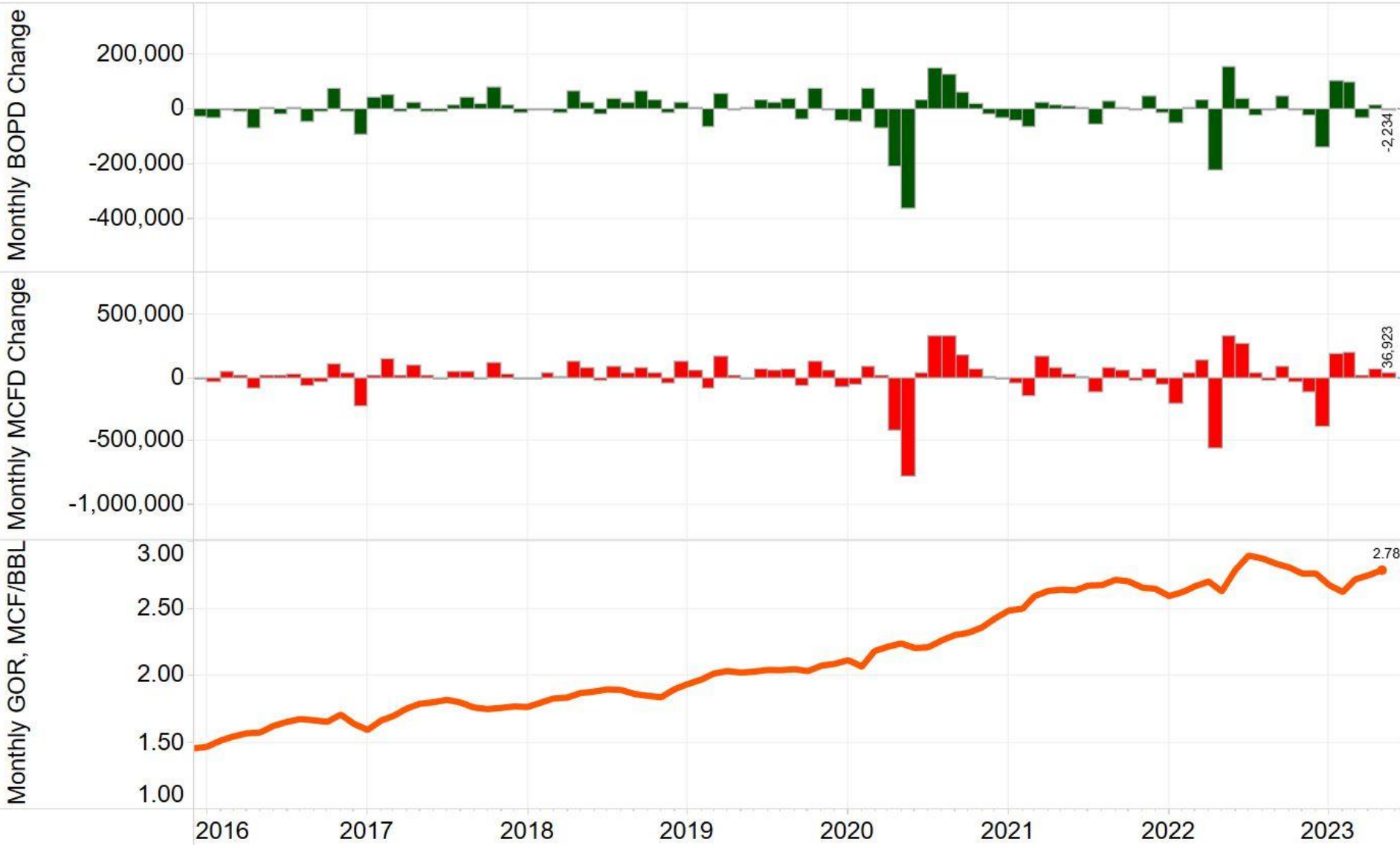


US Williston Basin Oil Production - 2023

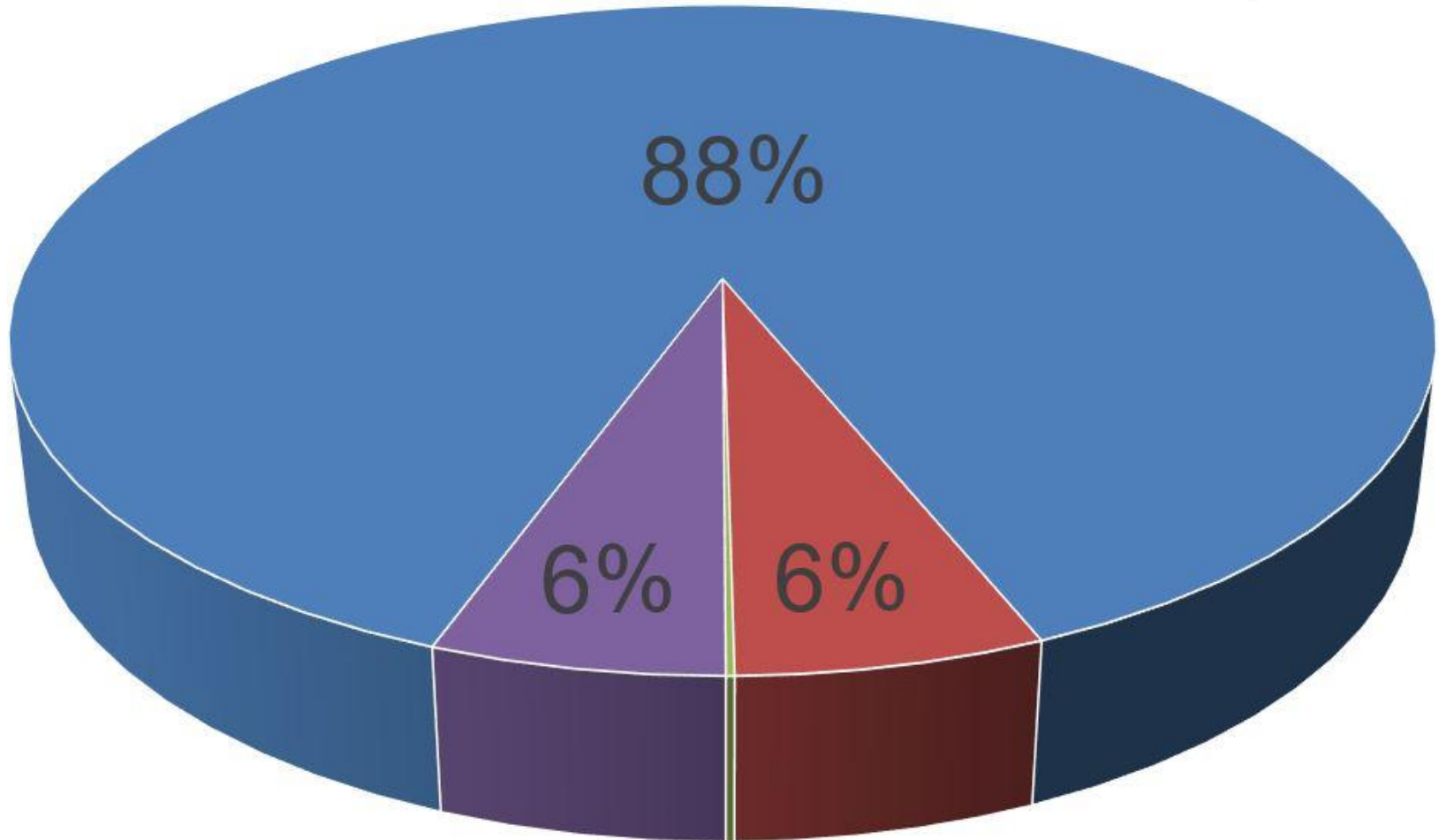
MONTH	ND	Eastern MT*	SD	TOTAL
January	1,062,627	62,039	2,610	1,127,276
February	1,158,880	63,483	2,475	1,224,838
March	1,124,289	64,465	2,652	1,191,406
April	1,135,763	61,066	2,557	1,199,386
May	1,133,530		2,560	
June				
July				
August				
September				
October				
November				
December				



North Dakota Monthly Production Change



Estimated Williston Basin Oil Transportation



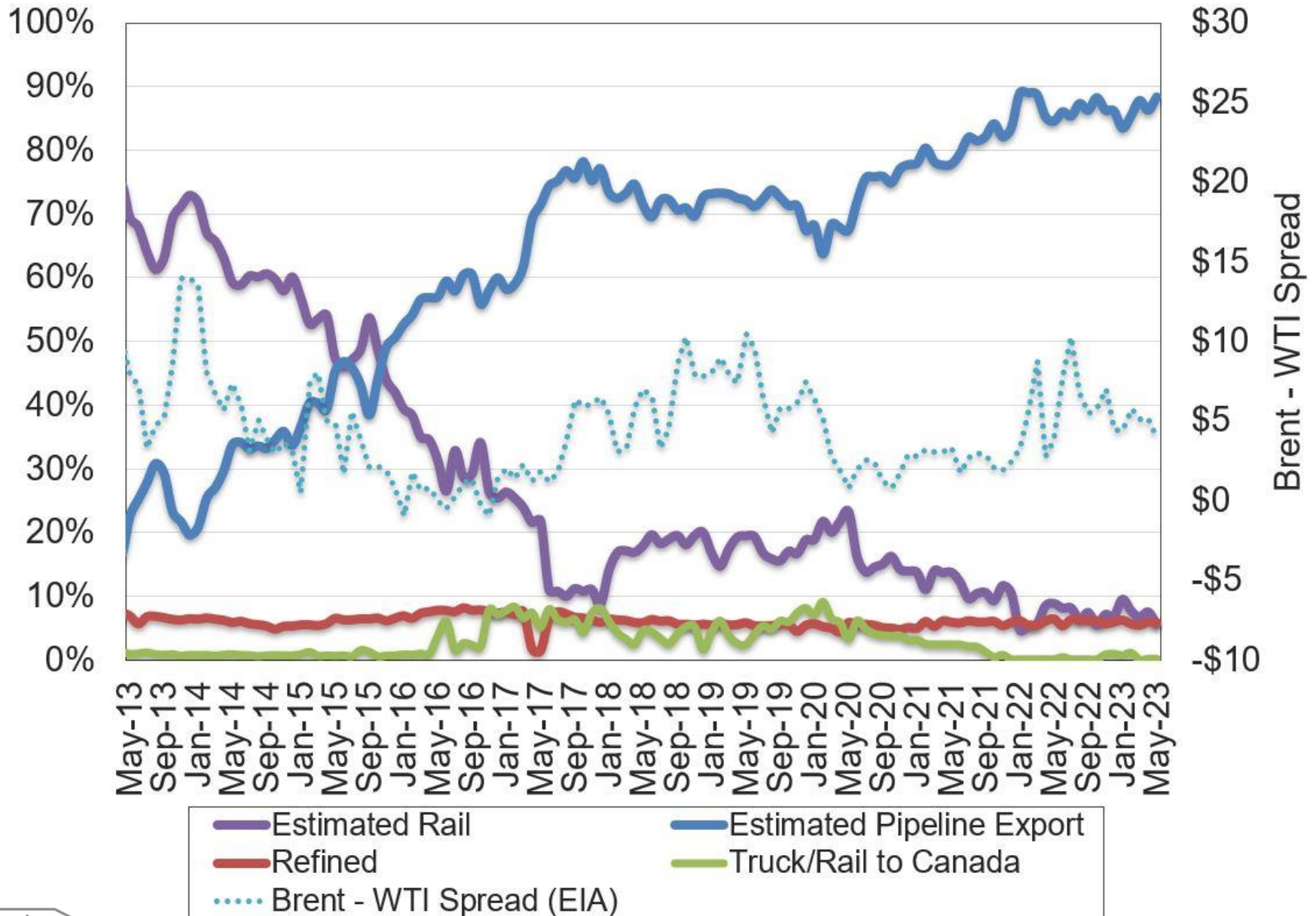
■ Pipeline Export 0%
■ Truck/Rail to Canada

■ Refined
■ Estimated Rail

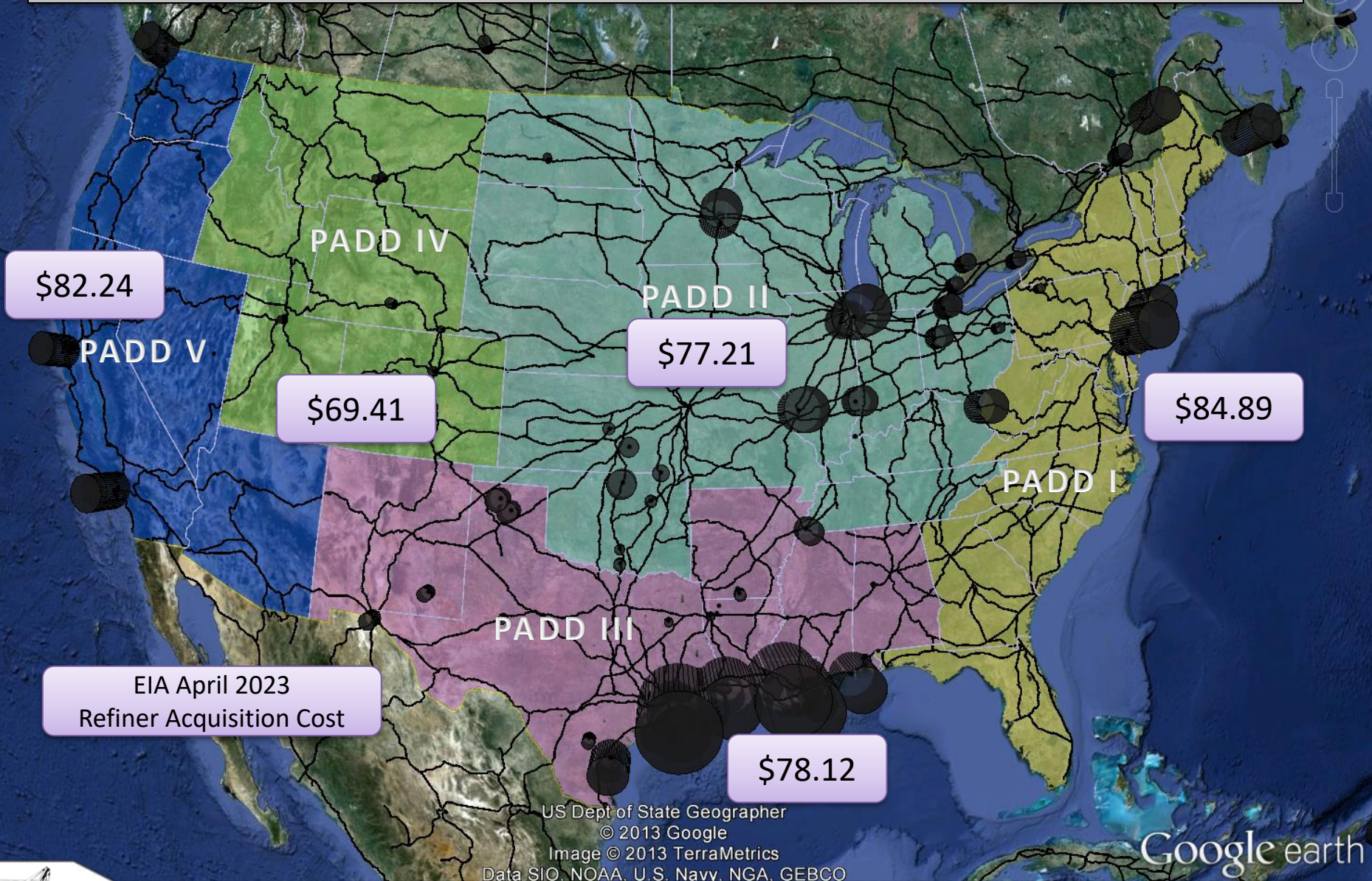
May 2023



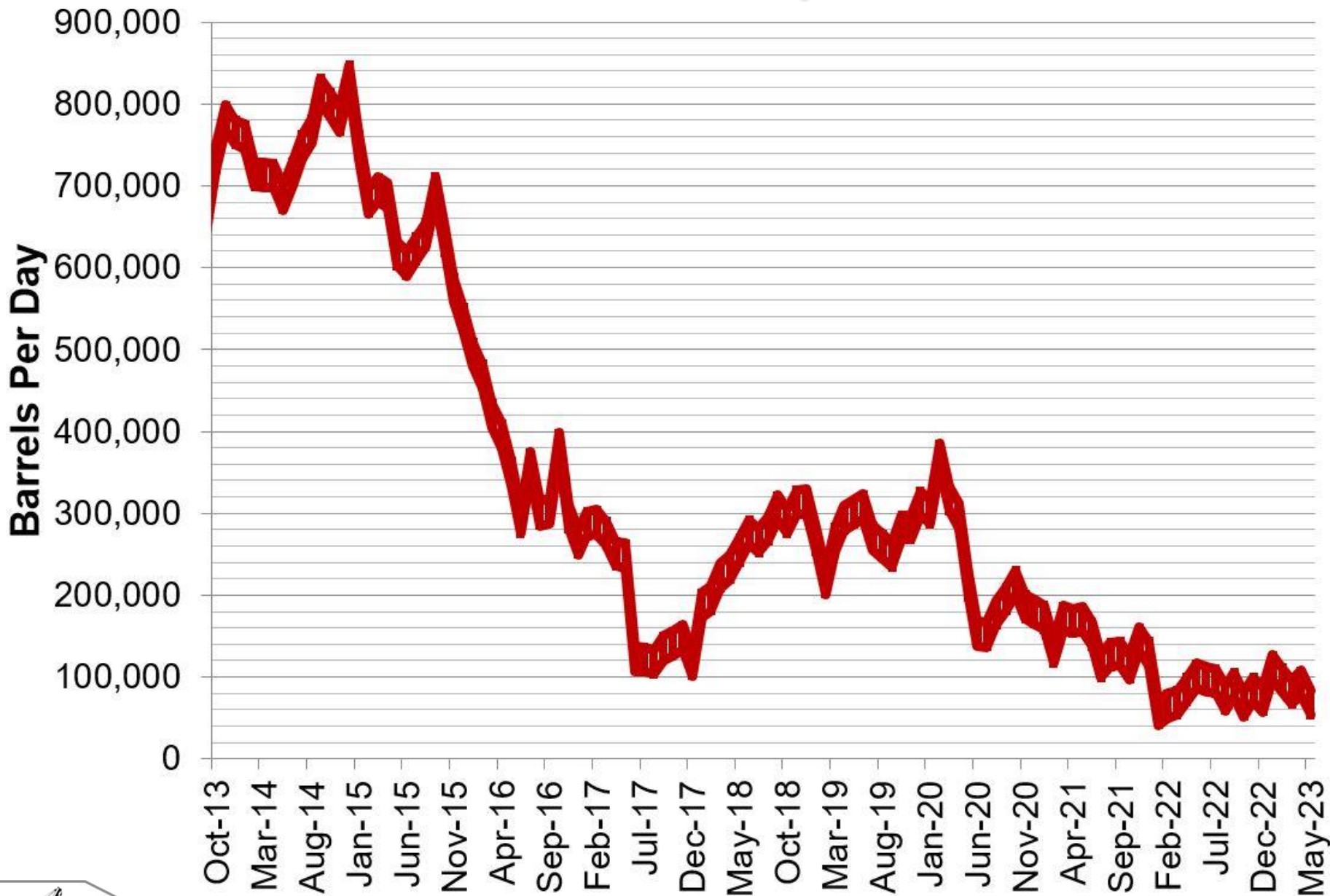
Estimated Williston Basin Oil Transportation



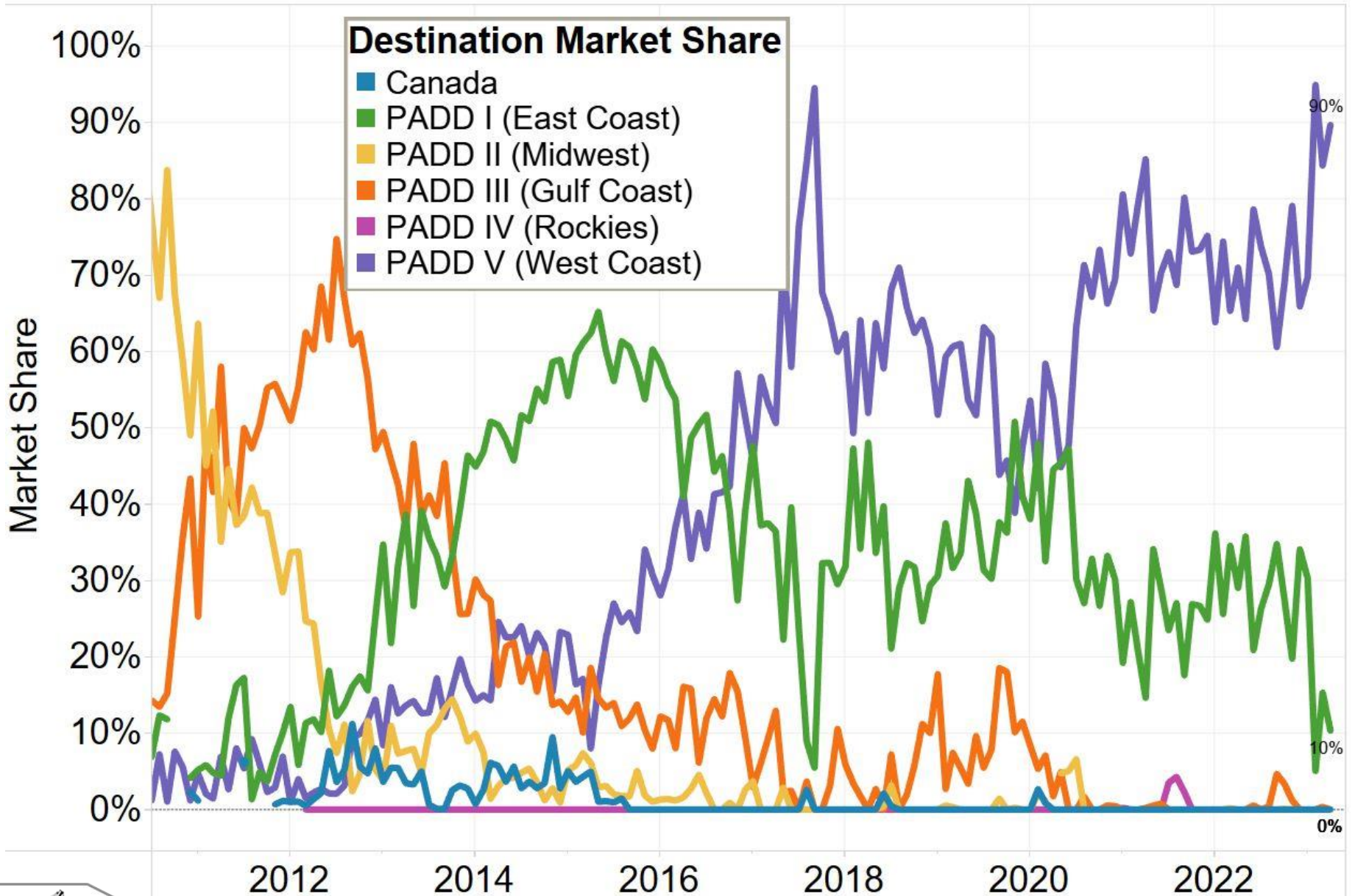
Major Rail Lines and Refineries



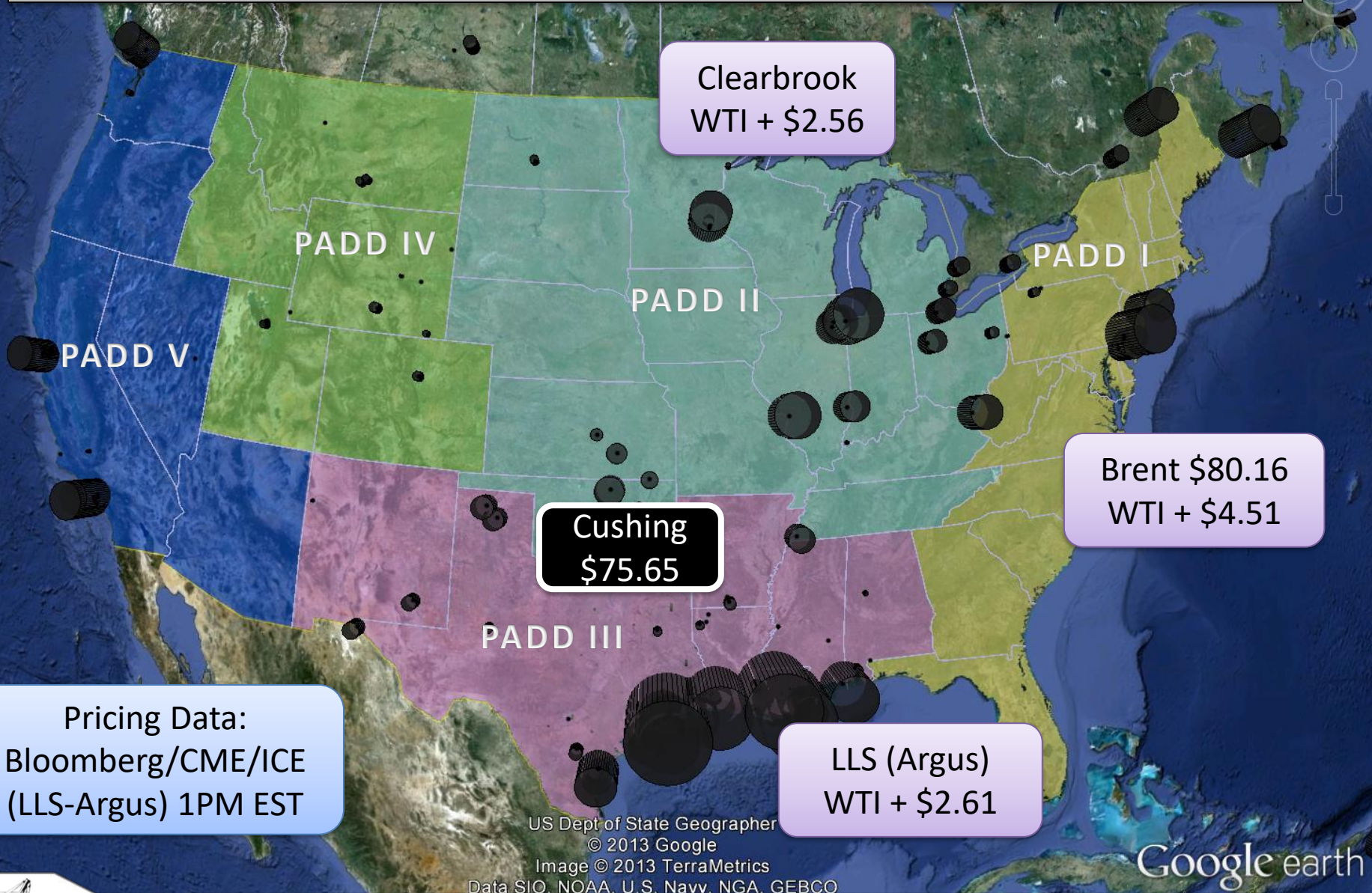
Estimated ND Rail Export Volumes



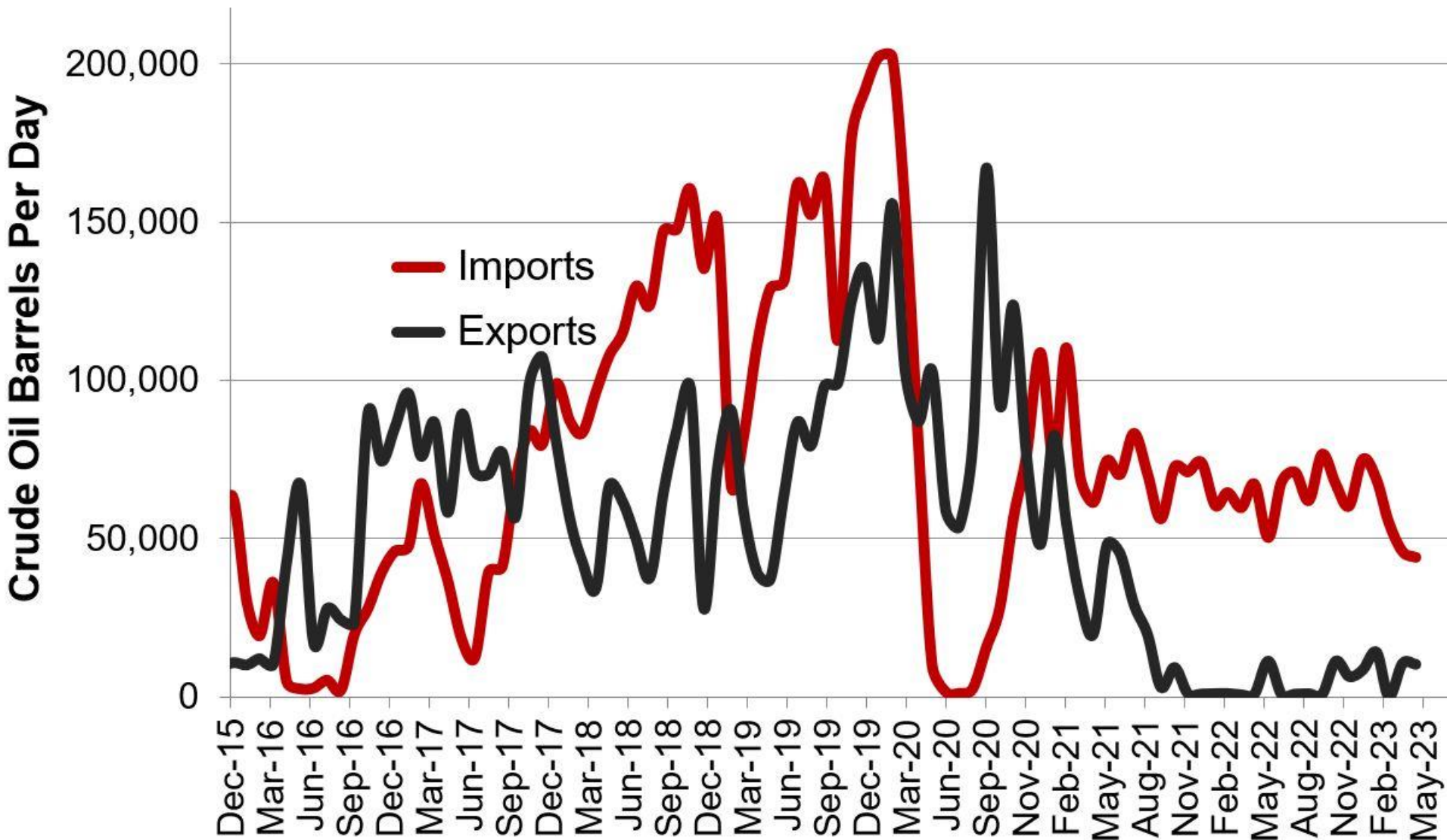
Rail Destinations Market Share (Apr. 2023)



Crude Oil Prices – July 14, 2023



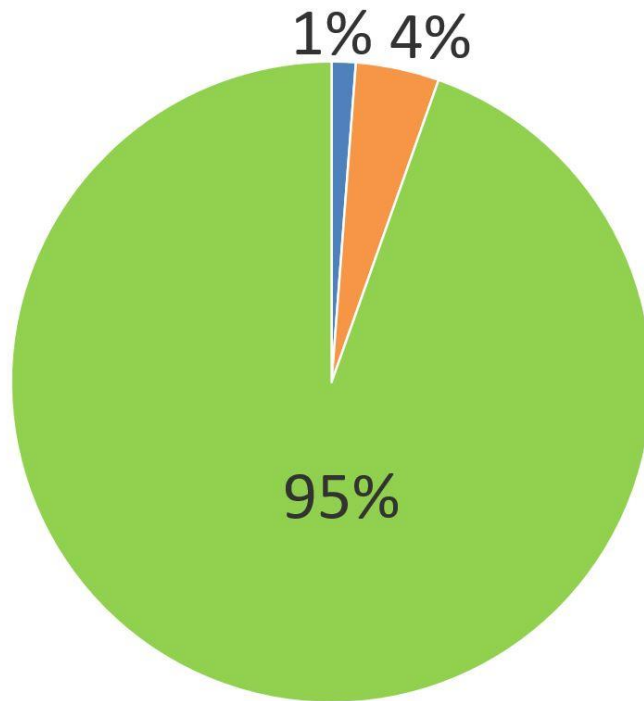
Williston Basin Truck/Rail Imports and Exports with Canada



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.

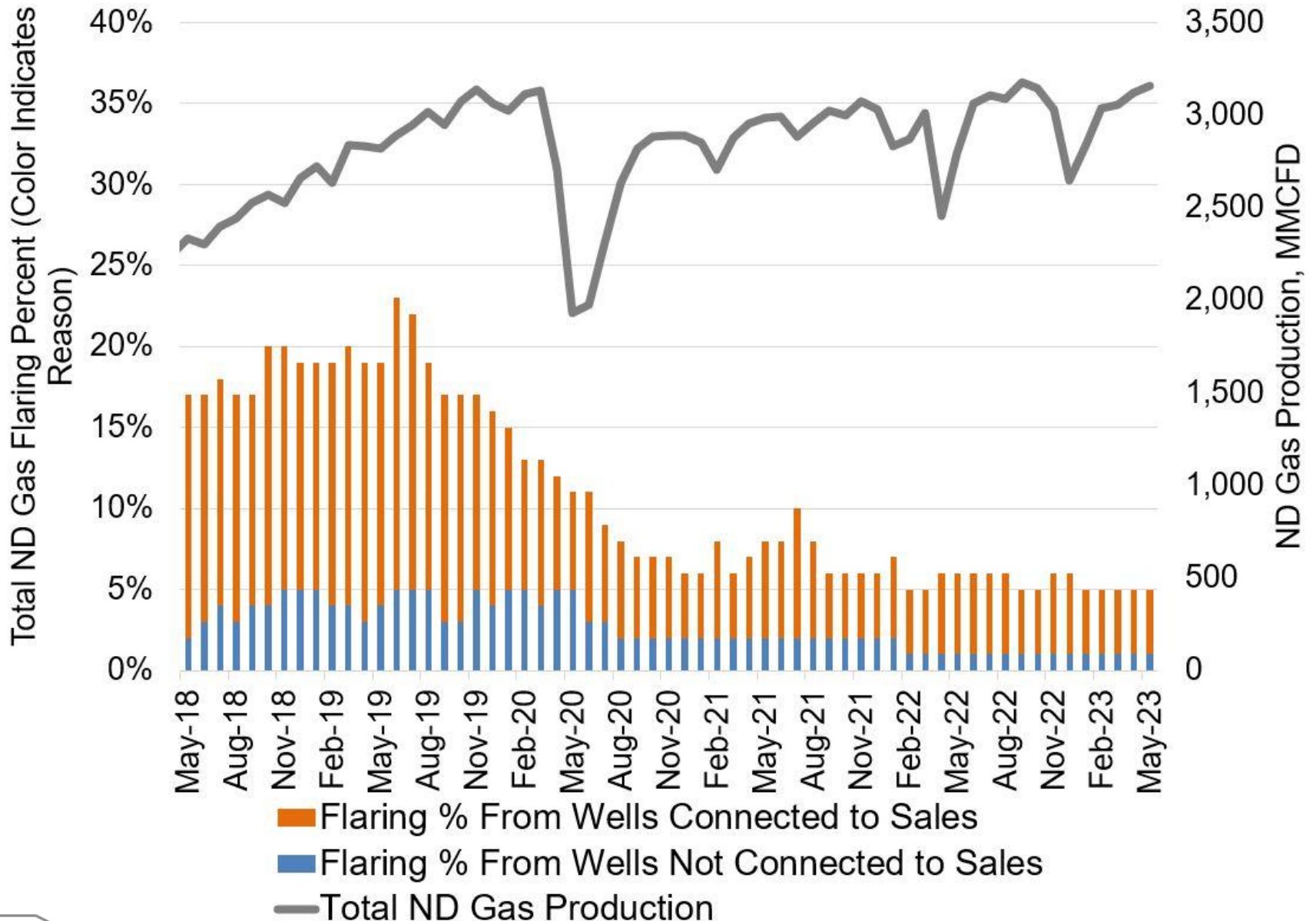
Simple Terms

Blue – Lack of pipelines
Orange – Challenges on existing infrastructure

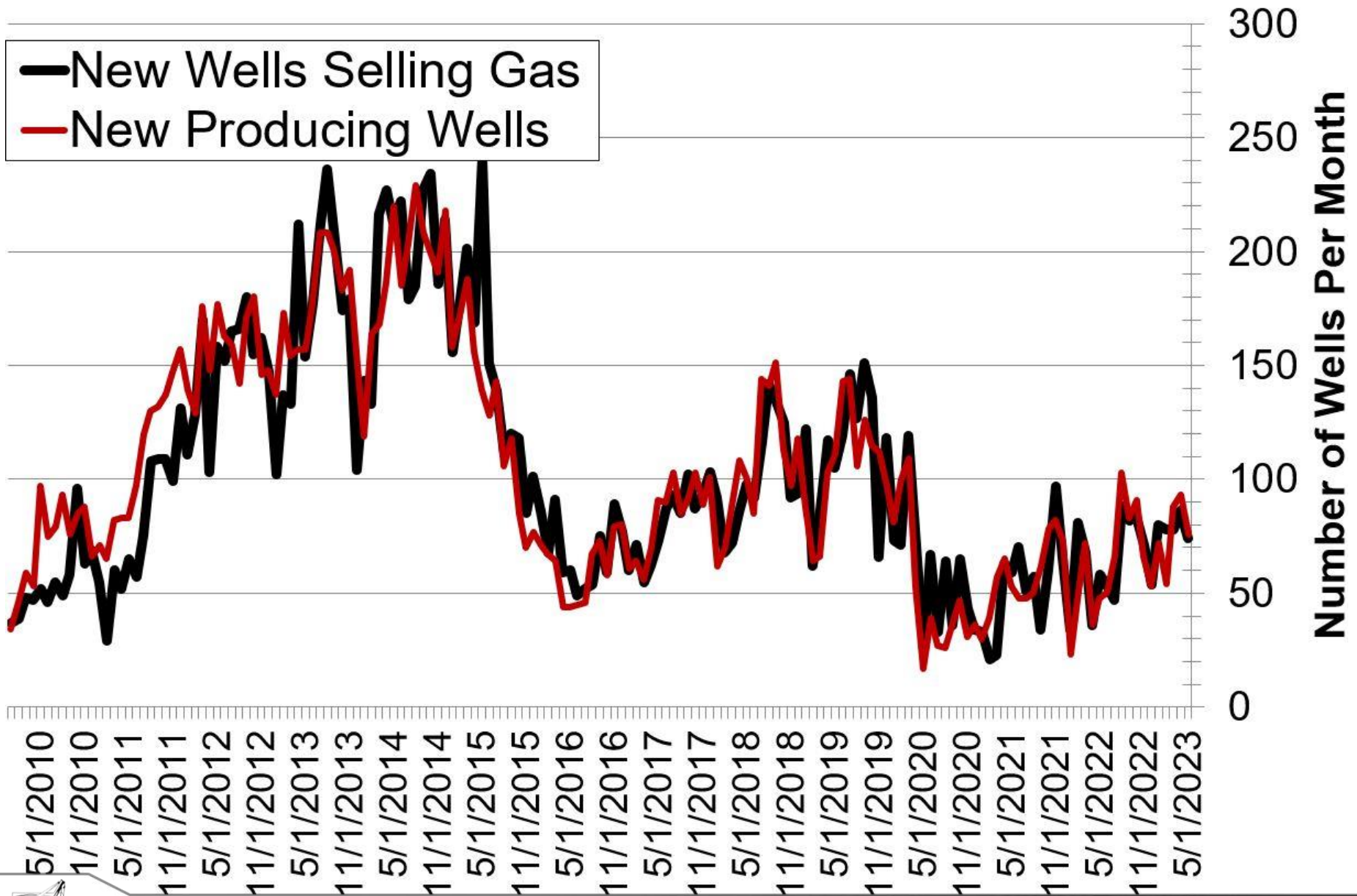
May 2023 Data – Non-Confidential Wells



Solving the Flaring Challenge

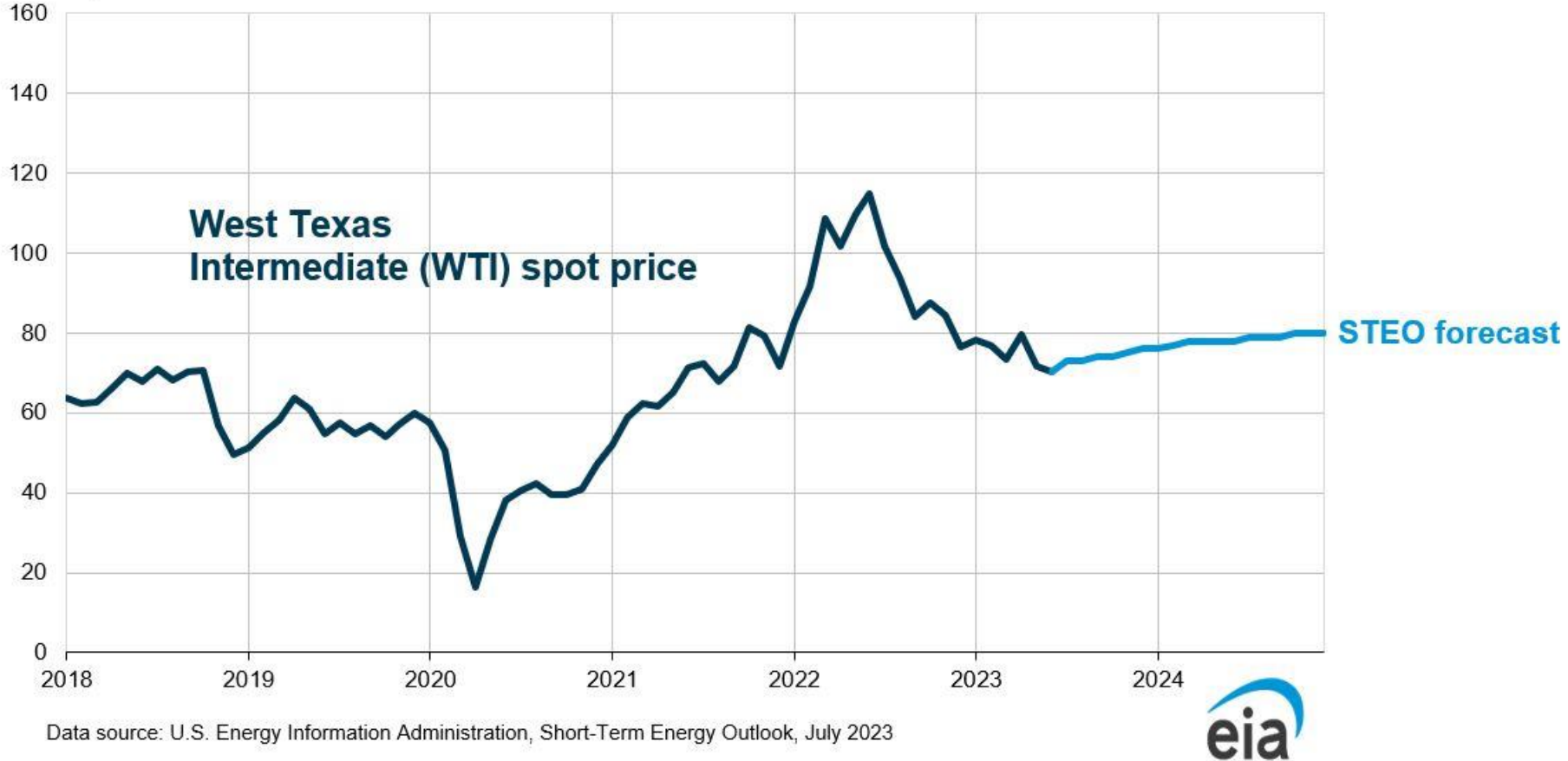


Solving the Flaring Challenge

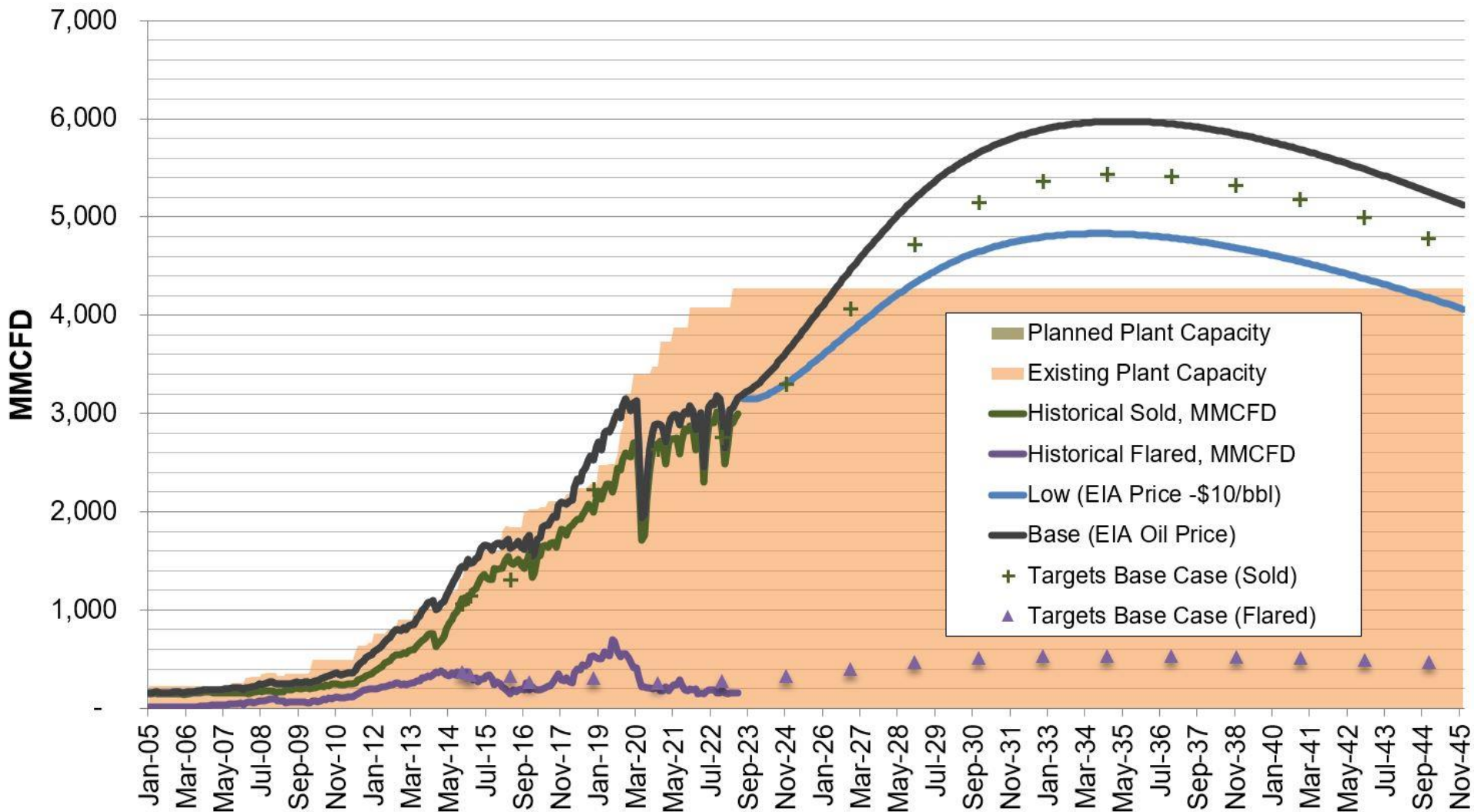


EIA Oil Price Forecast: July 2023

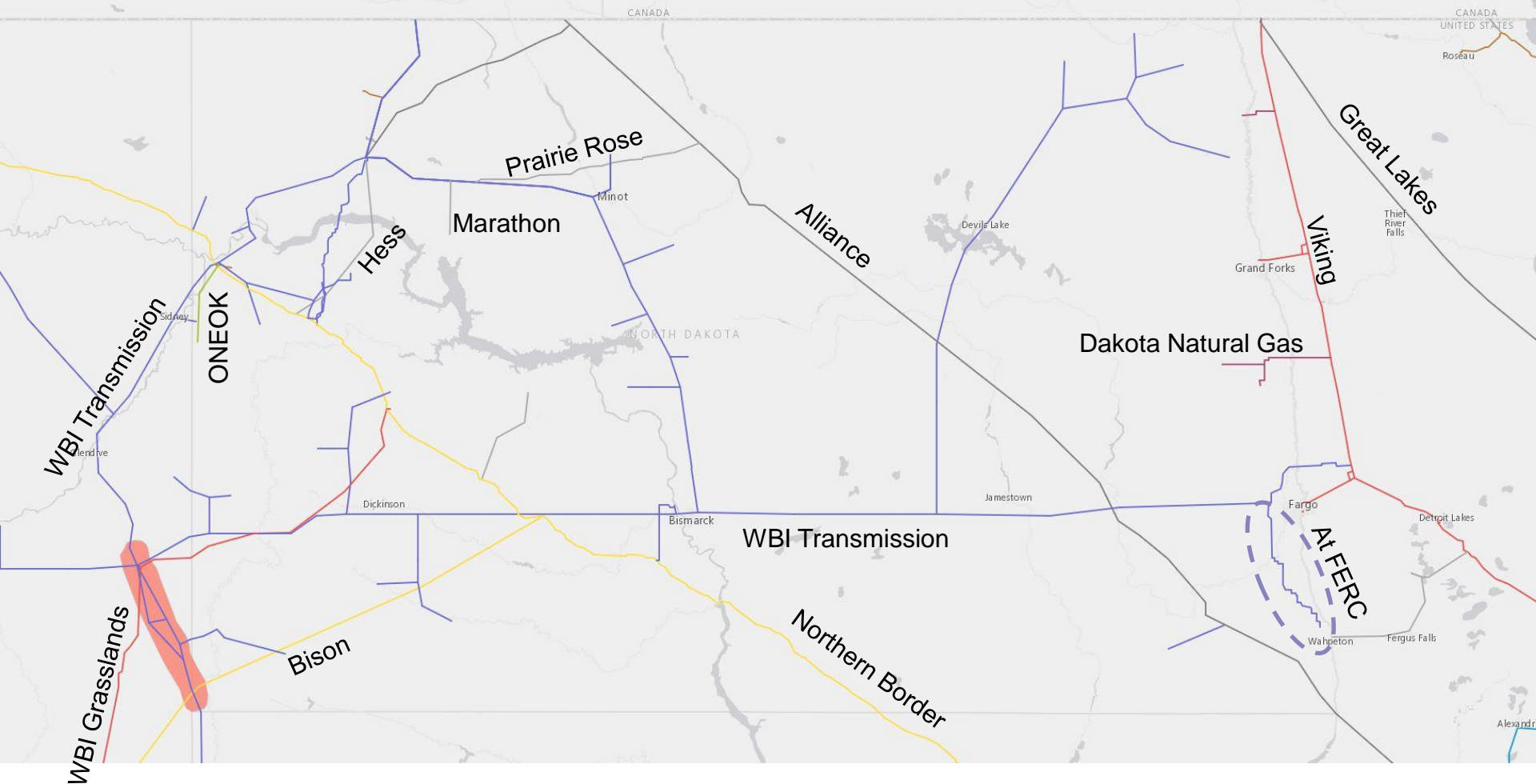
West Texas Intermediate (WTI) crude oil price dollars per barrel



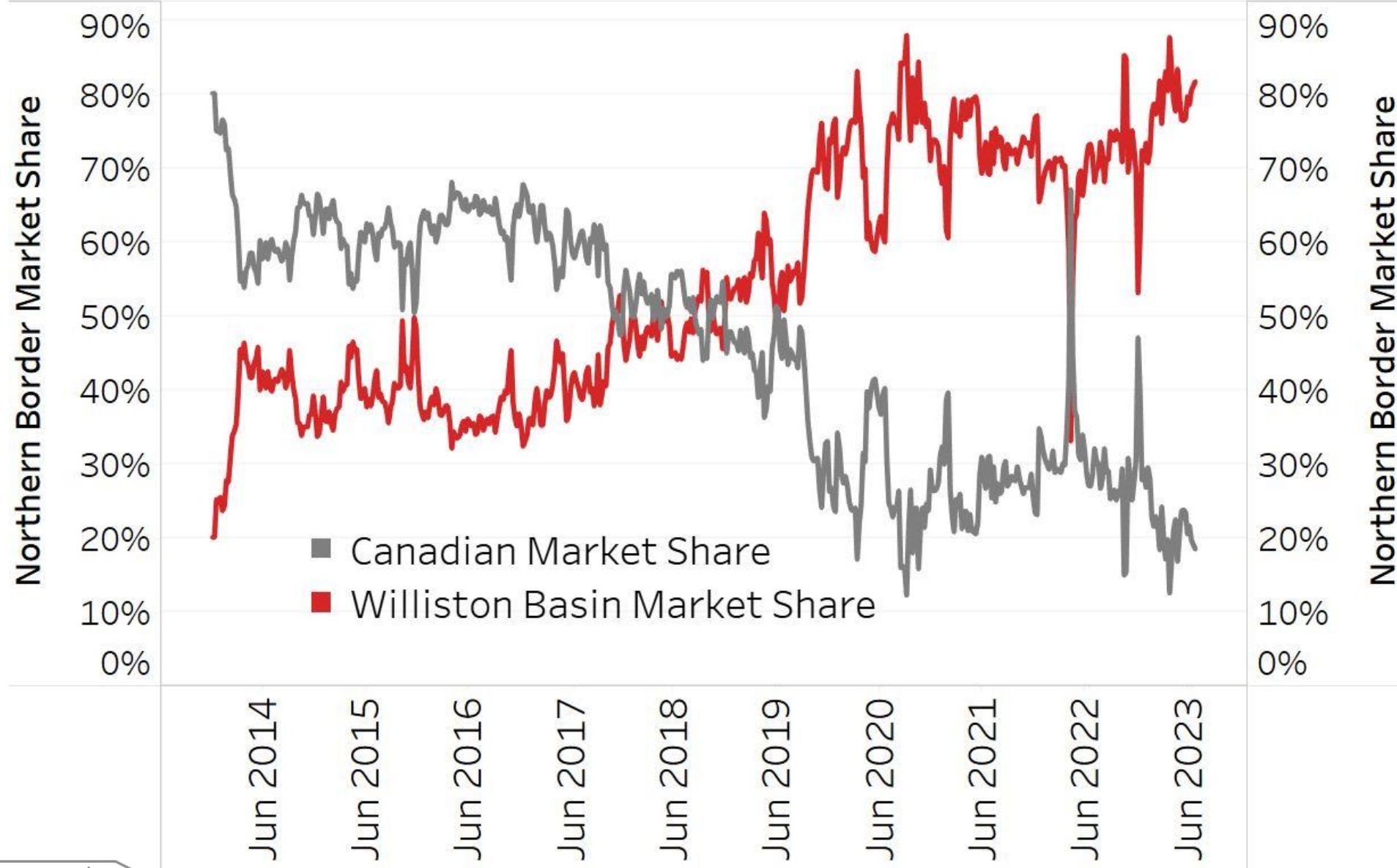
Solving the Flaring Challenge



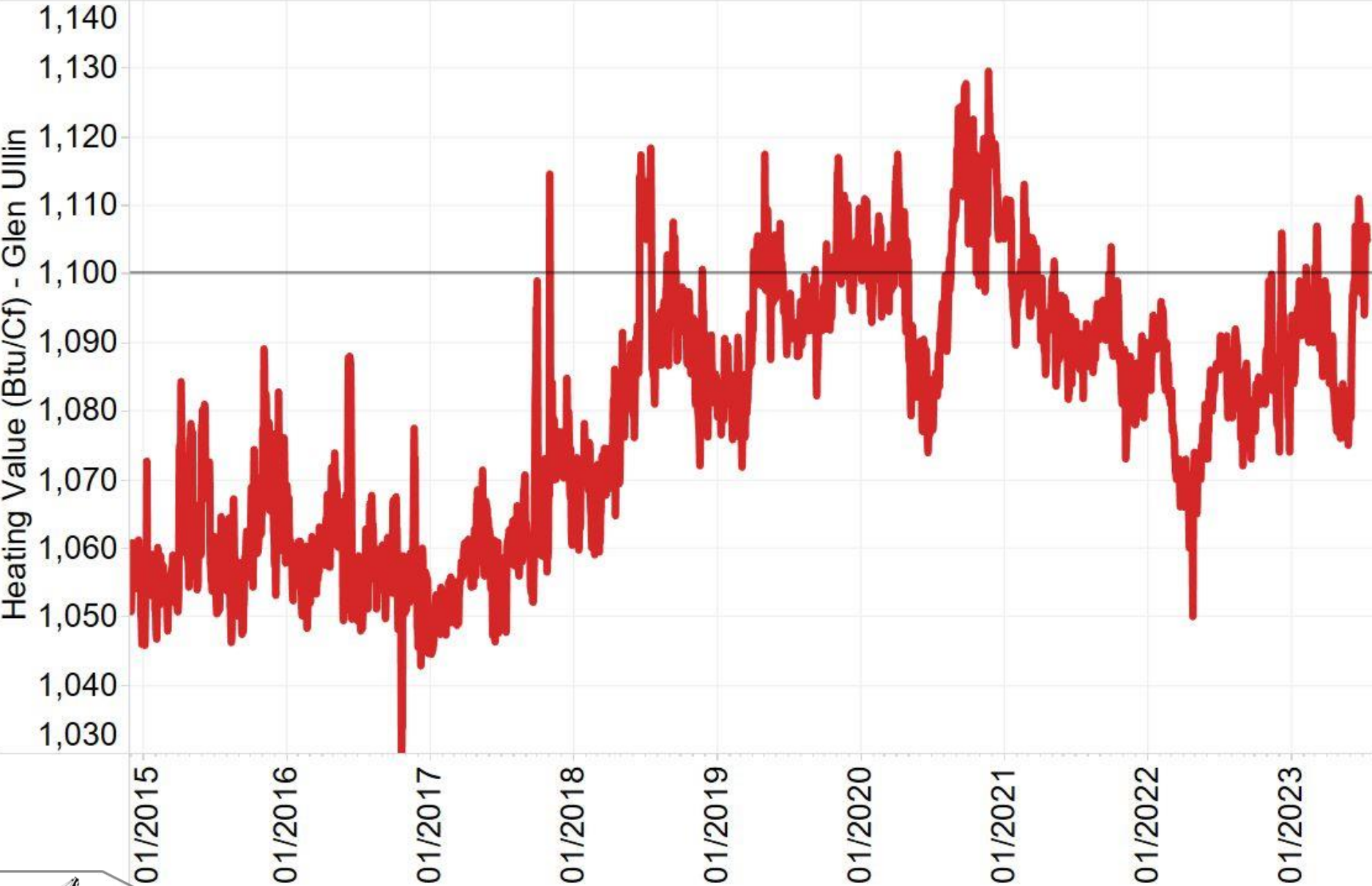
Bakken Natural Gas Infrastructure



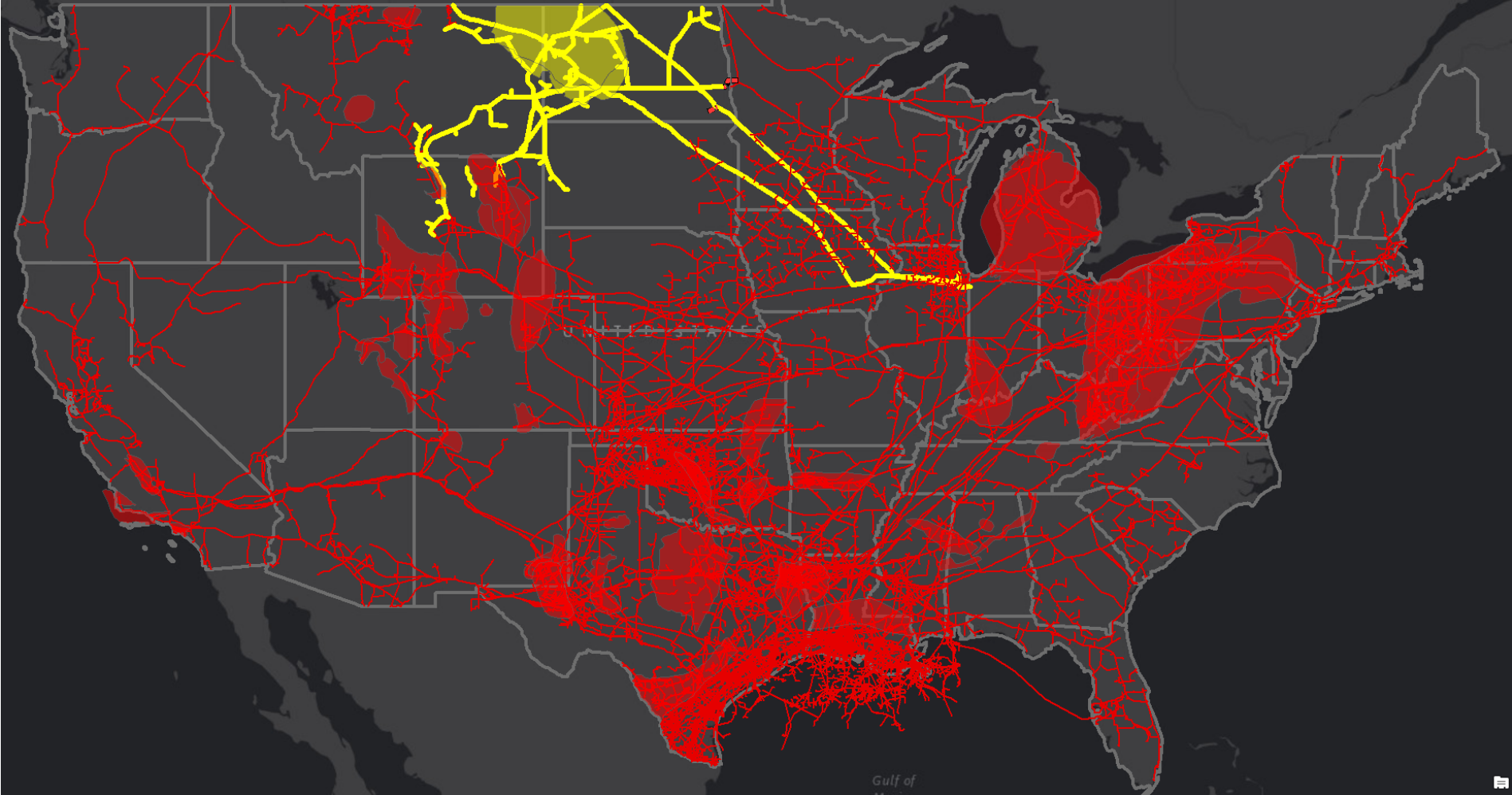
Northern Border Pipeline Market Share



Northern Border BTU at Glen Ullin, ND



Bakken Natural Gas Infrastructure



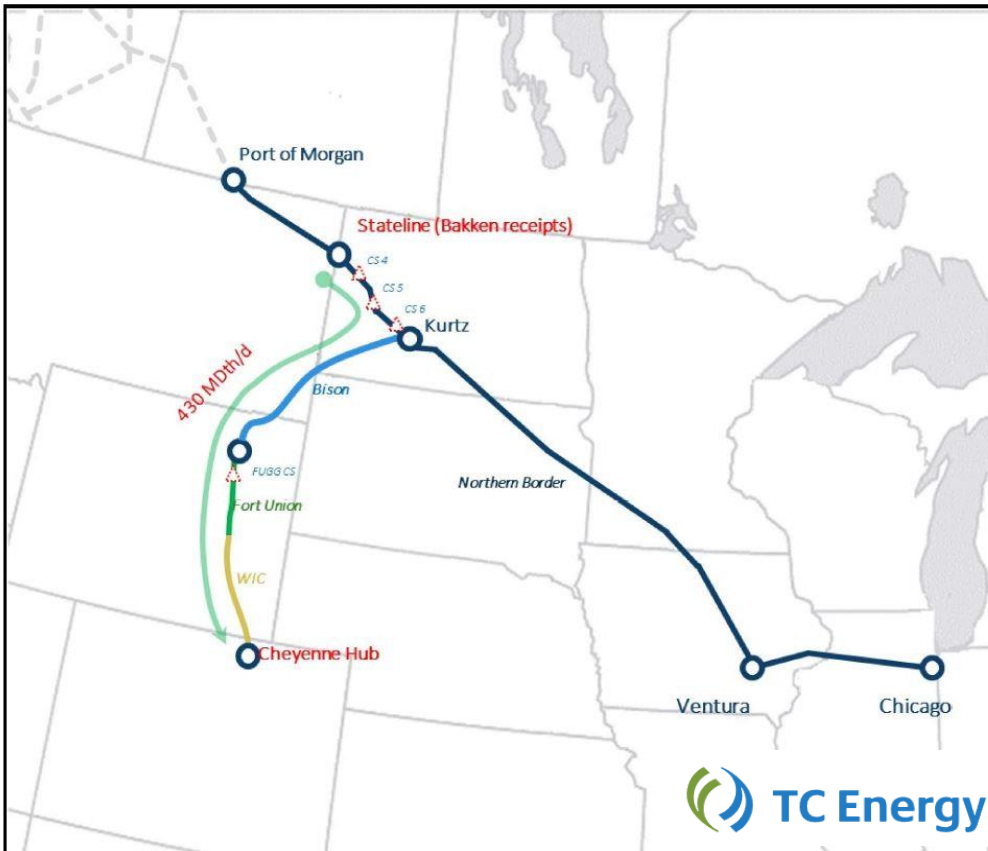
TC Energy / Kinder Morgan: Bison/Bakken xPress Project

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 up to 430,000 Dth/Day
- March 2026 targeted in-service date
- Fort Union Gas Gathering and Wyoming Interstate Company provide further transport to Cheyenne hub.
- Seeking commitments 10yrs or Longer

Proposed Minimum Recourse Rate

- 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



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