

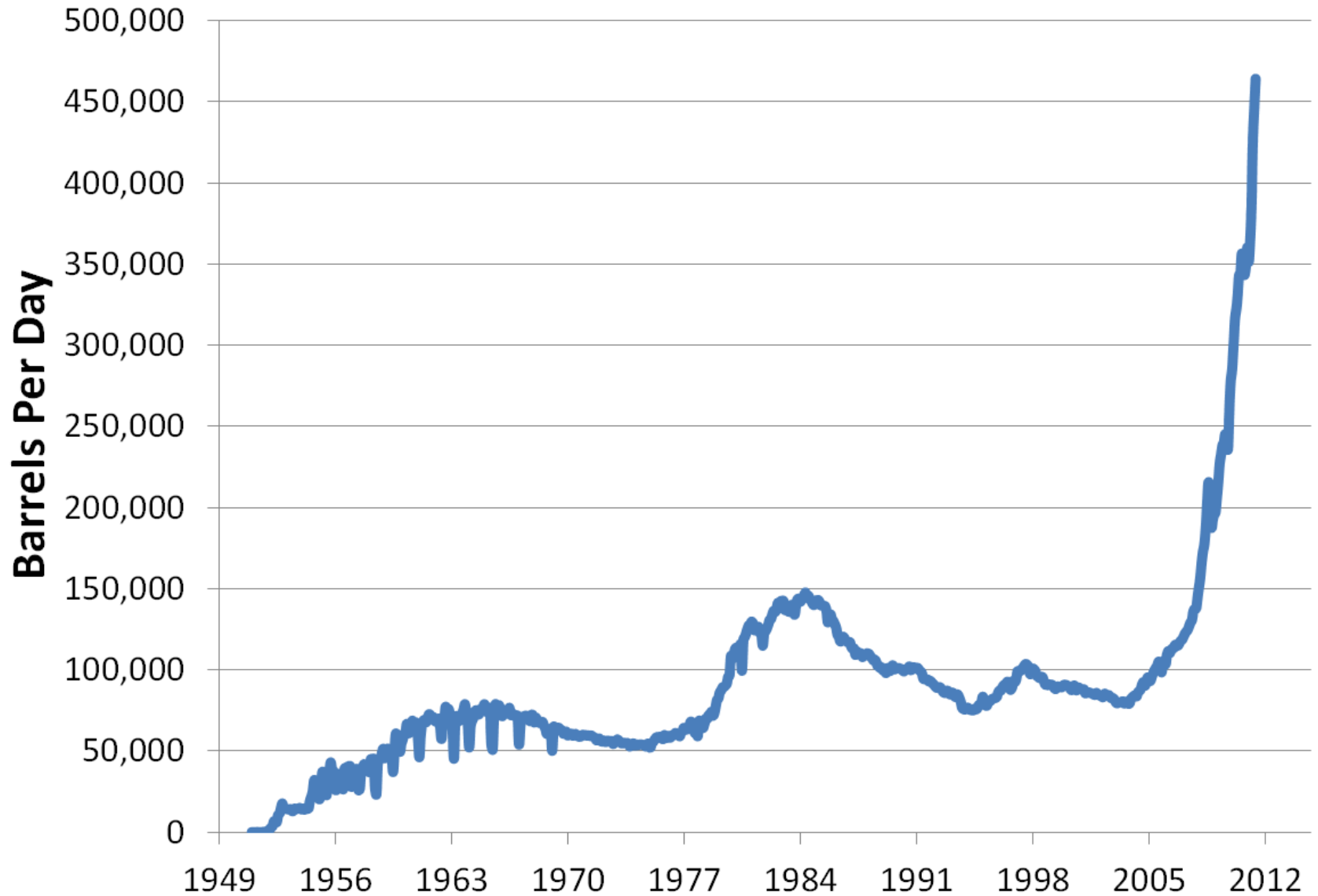


North Dakota Pipeline Authority
Energy Development and Transmission Committee
Justin J. Kringstad
November 29, 2011 – Bismarck, ND

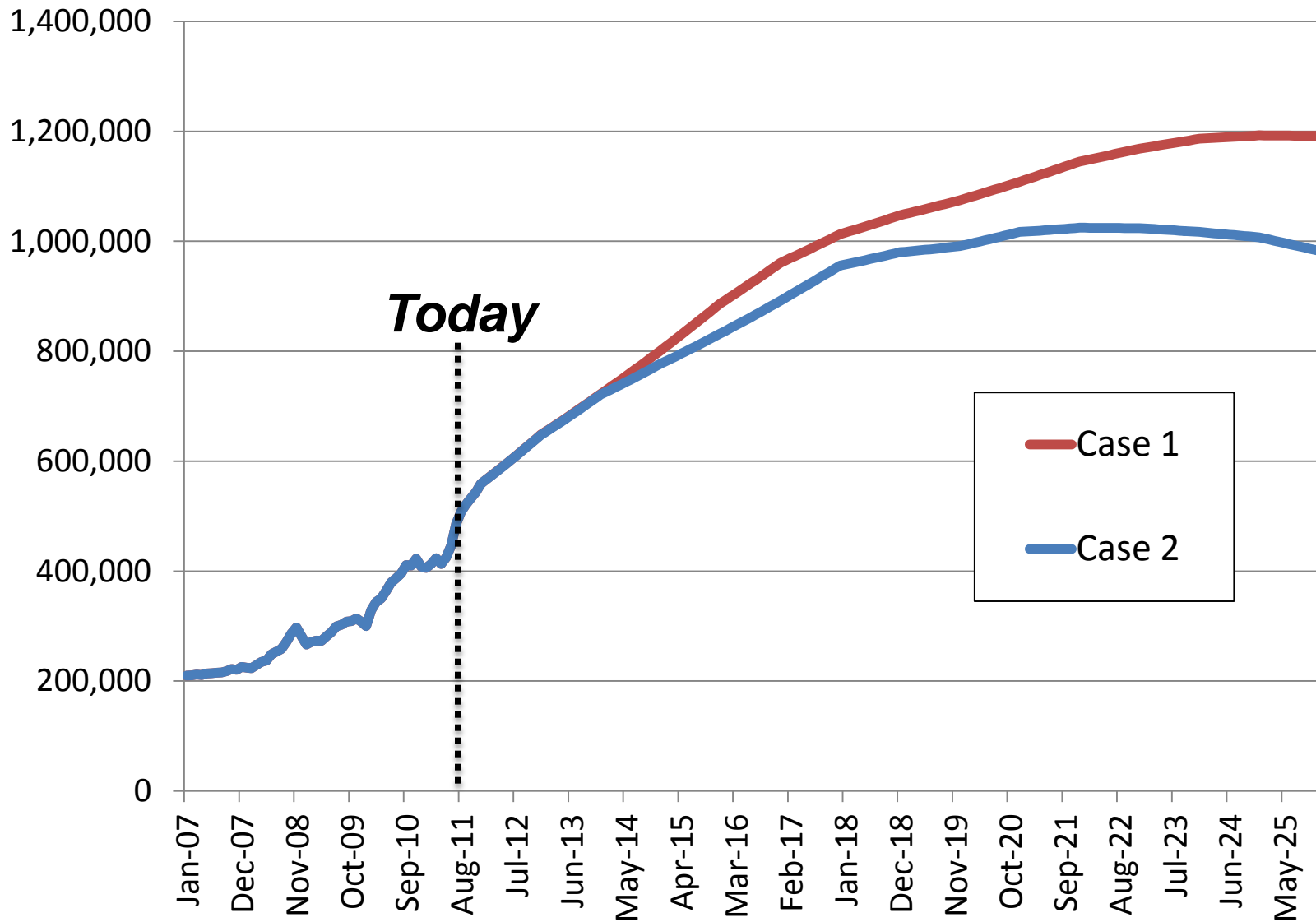
*“Goldman Sachs predicted that the U.S. will overtake Russia and Saudi Arabia in six years. Producers and industry insiders noted the untapped reserves in the liquids-rich **Bakken Play of North Dakota** and Montana, the Granite Wash of western Oklahoma and Texas Panhandle and other previously uneconomical plays.”*

Tulsa World
October 8, 2011

North Dakota Crude Oil



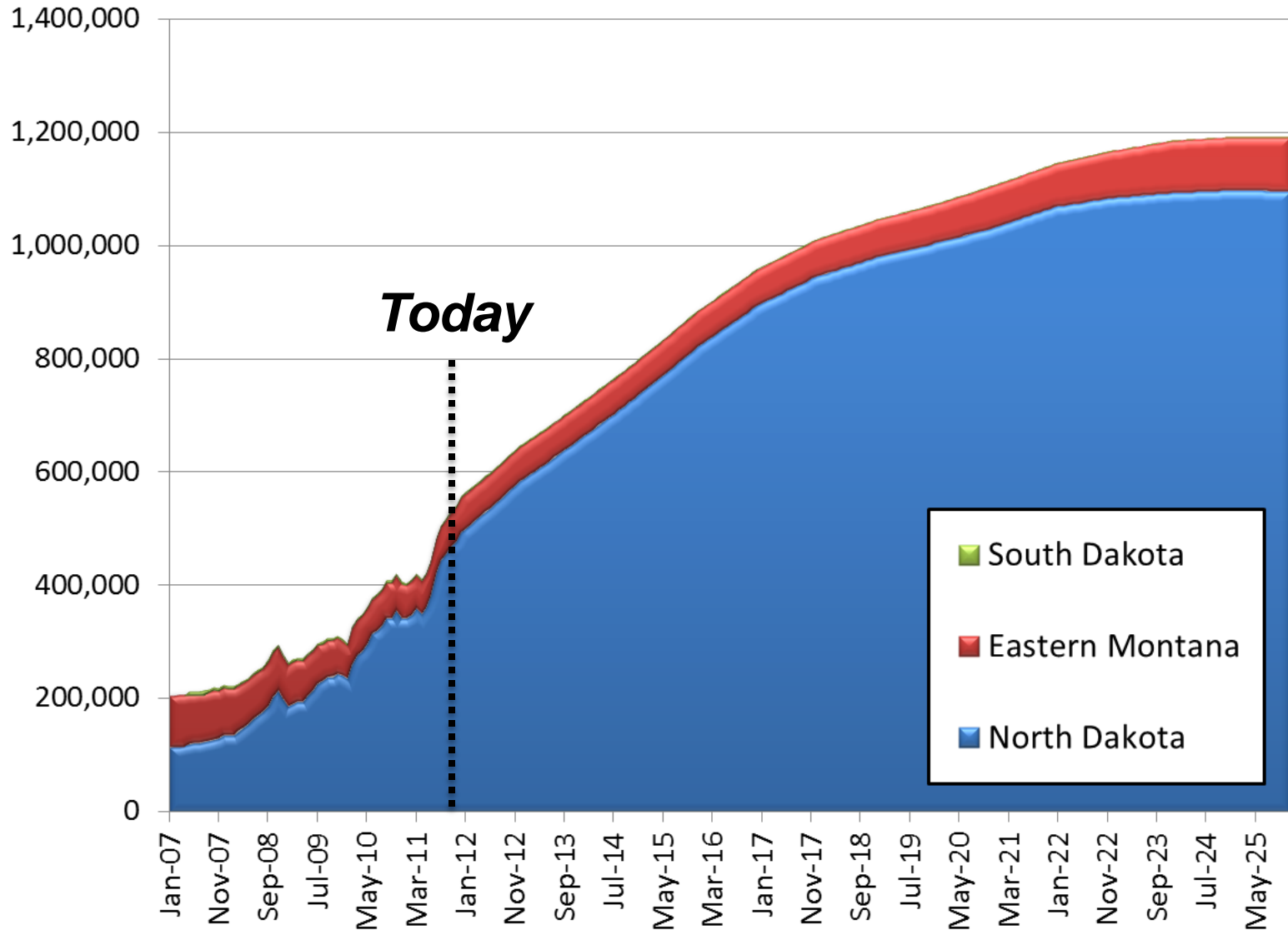
Forecasting Williston Basin Oil Production, BOPD



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



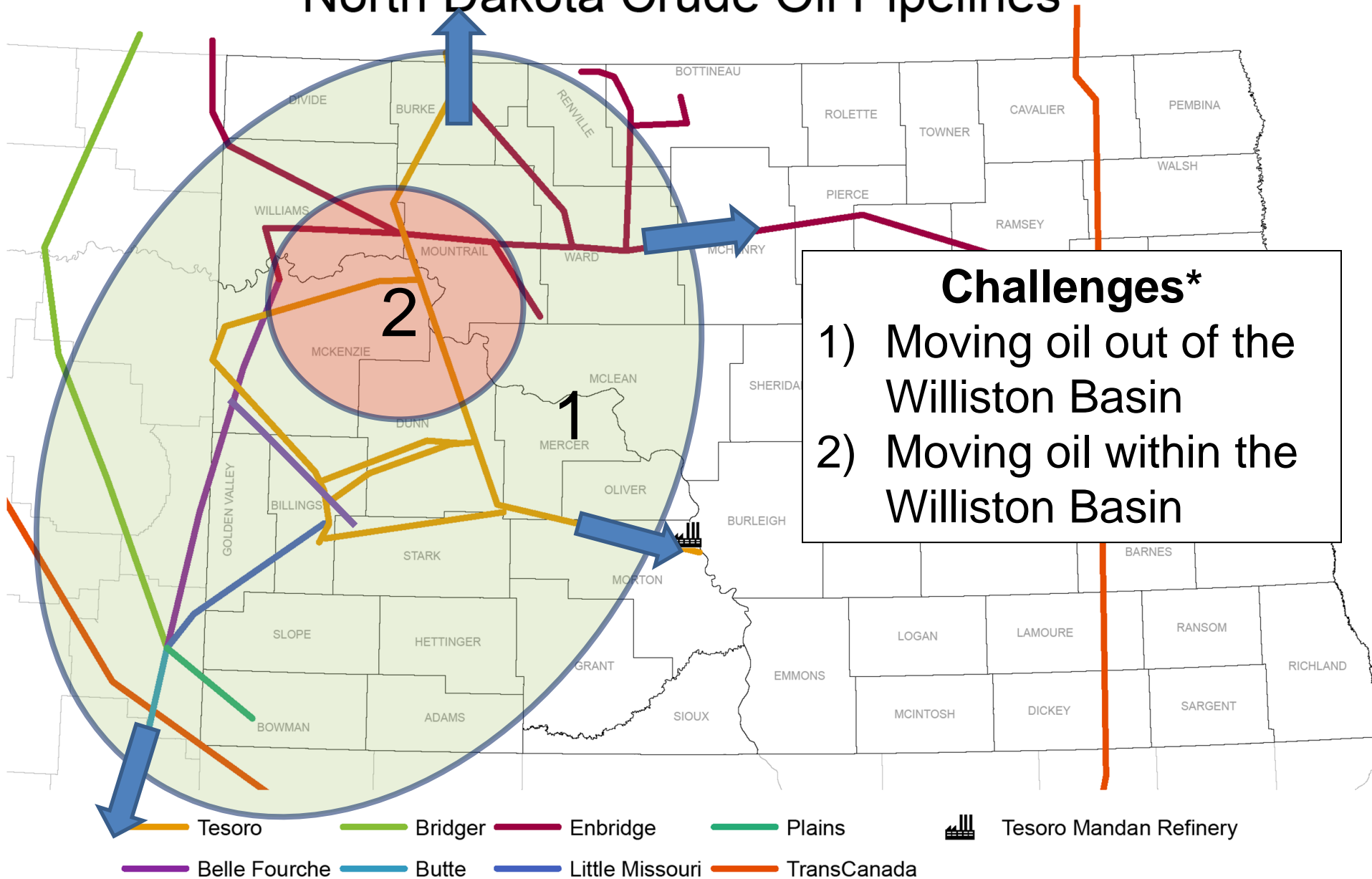
Forecasting Williston Basin Oil Production, BOPD



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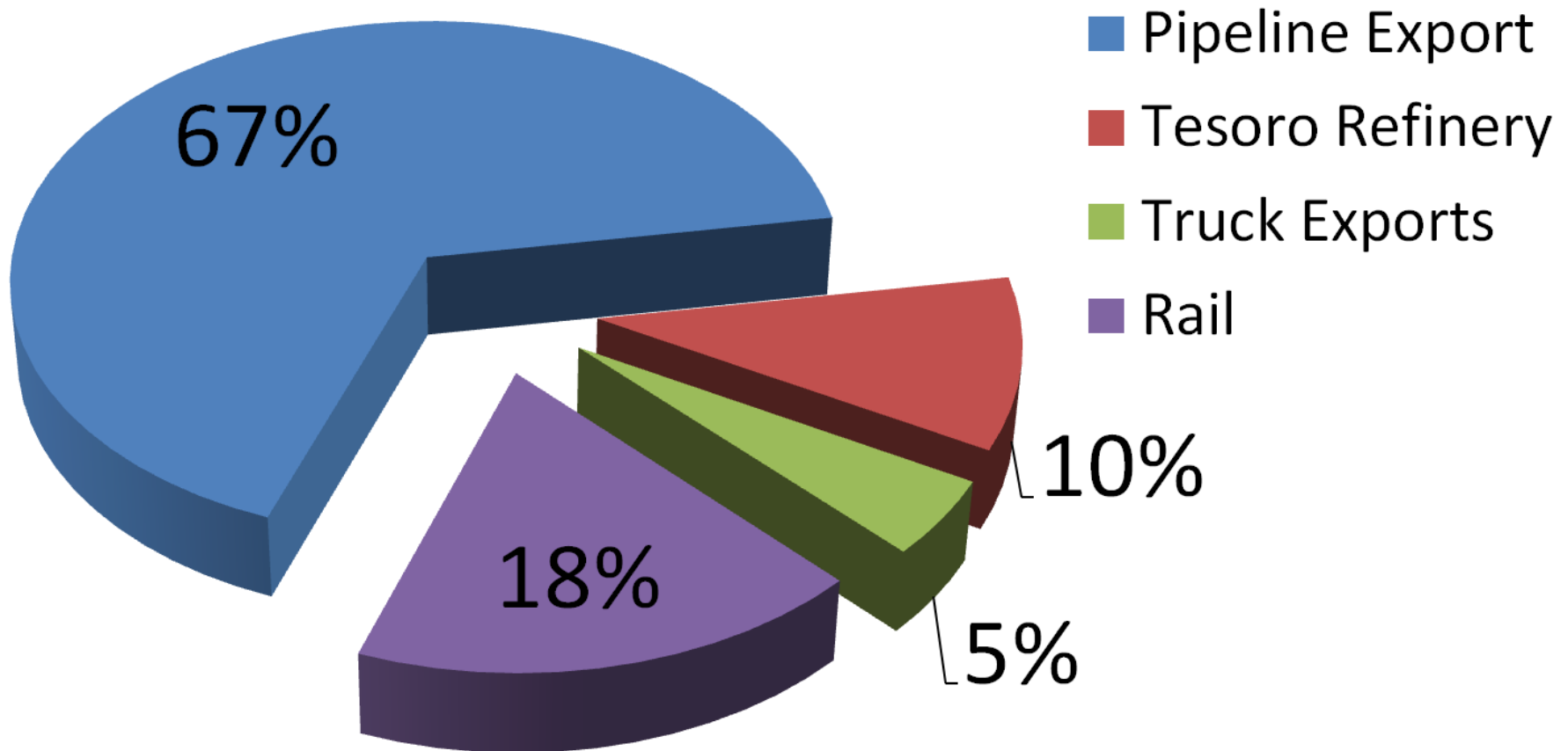


North Dakota Crude Oil Pipelines



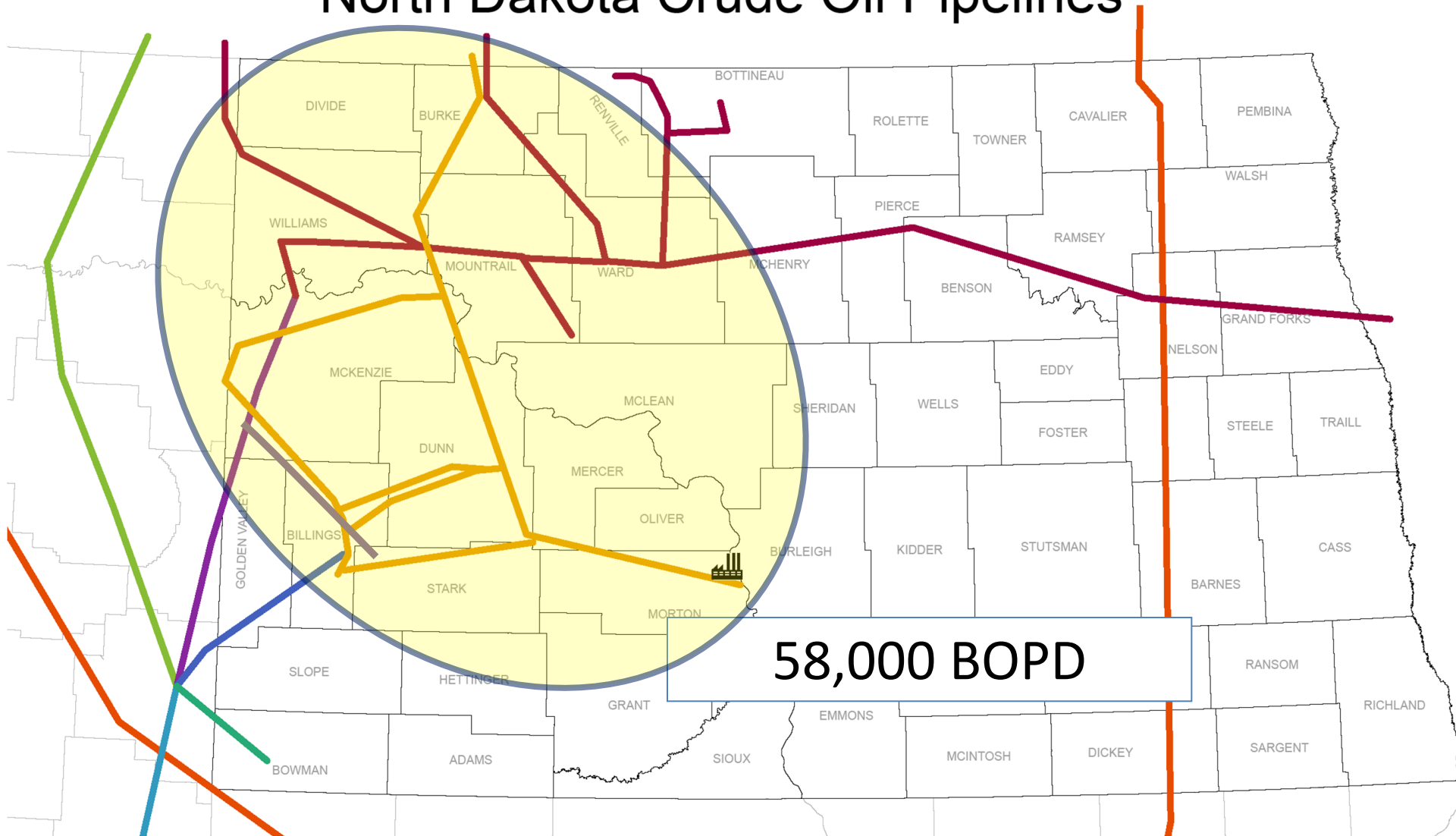
*Modified from Bridger and Belle Fourche Pipelines

Williston Basin Oil Transportation



September 2011 Estimates

North Dakota Crude Oil Pipelines



— Tesoro
 — Bridger
 — Enbridge
 — Plains
  Tesoro Mandan Refinery
— Belle Fourche
— Butte
— Little Missouri
— TransCanada

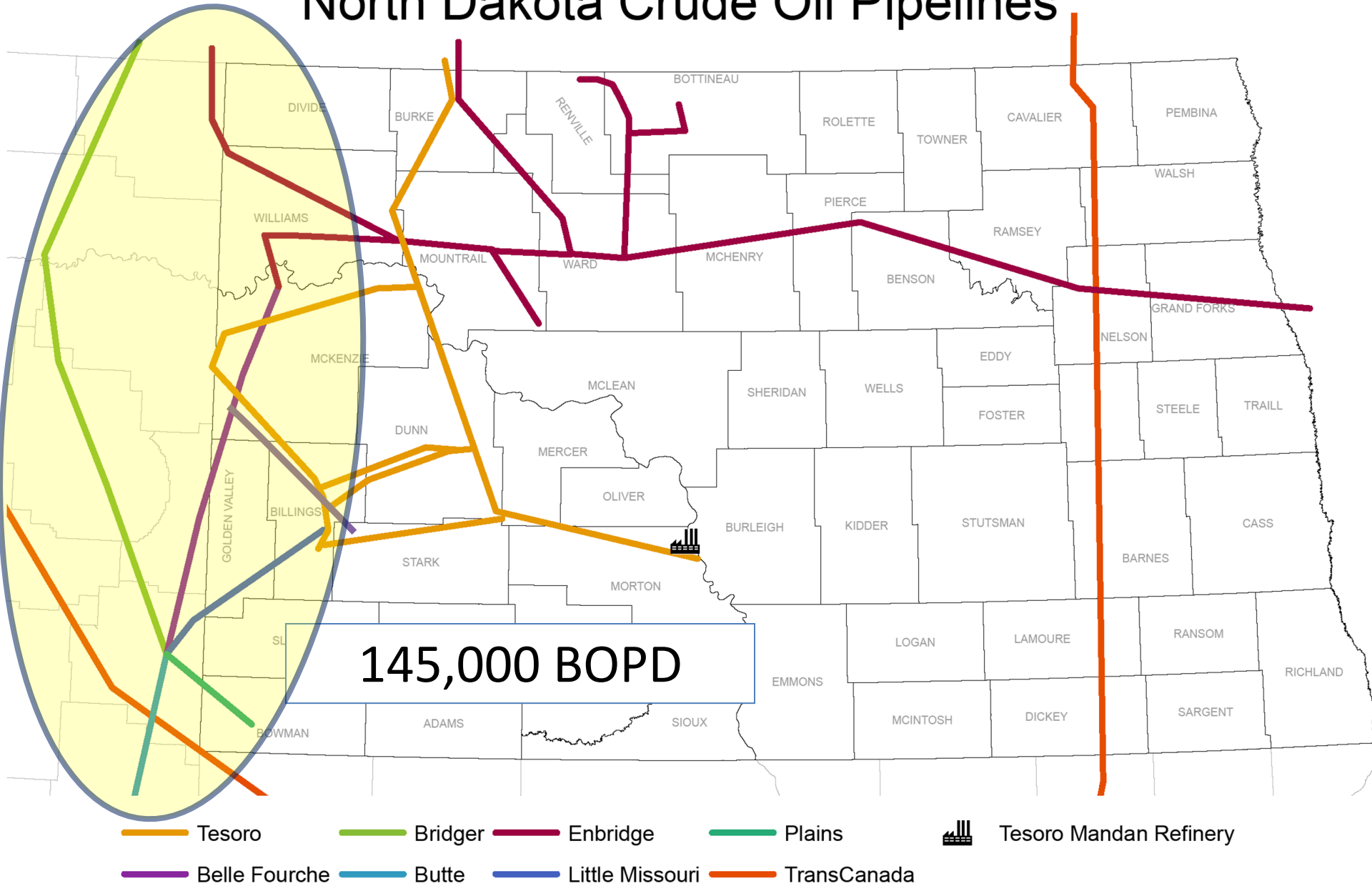
North Dakota Crude Oil Pipelines

25,000 BOPD

185,000 BOPD
210,000 BOPD Q1 2012

— Tesoro — Bridger — Enbridge — Plains —  Tesoro Mandan Refinery
— Belle Fourche — Butte — Little Missouri — TransCanada

North Dakota Crude Oil Pipelines



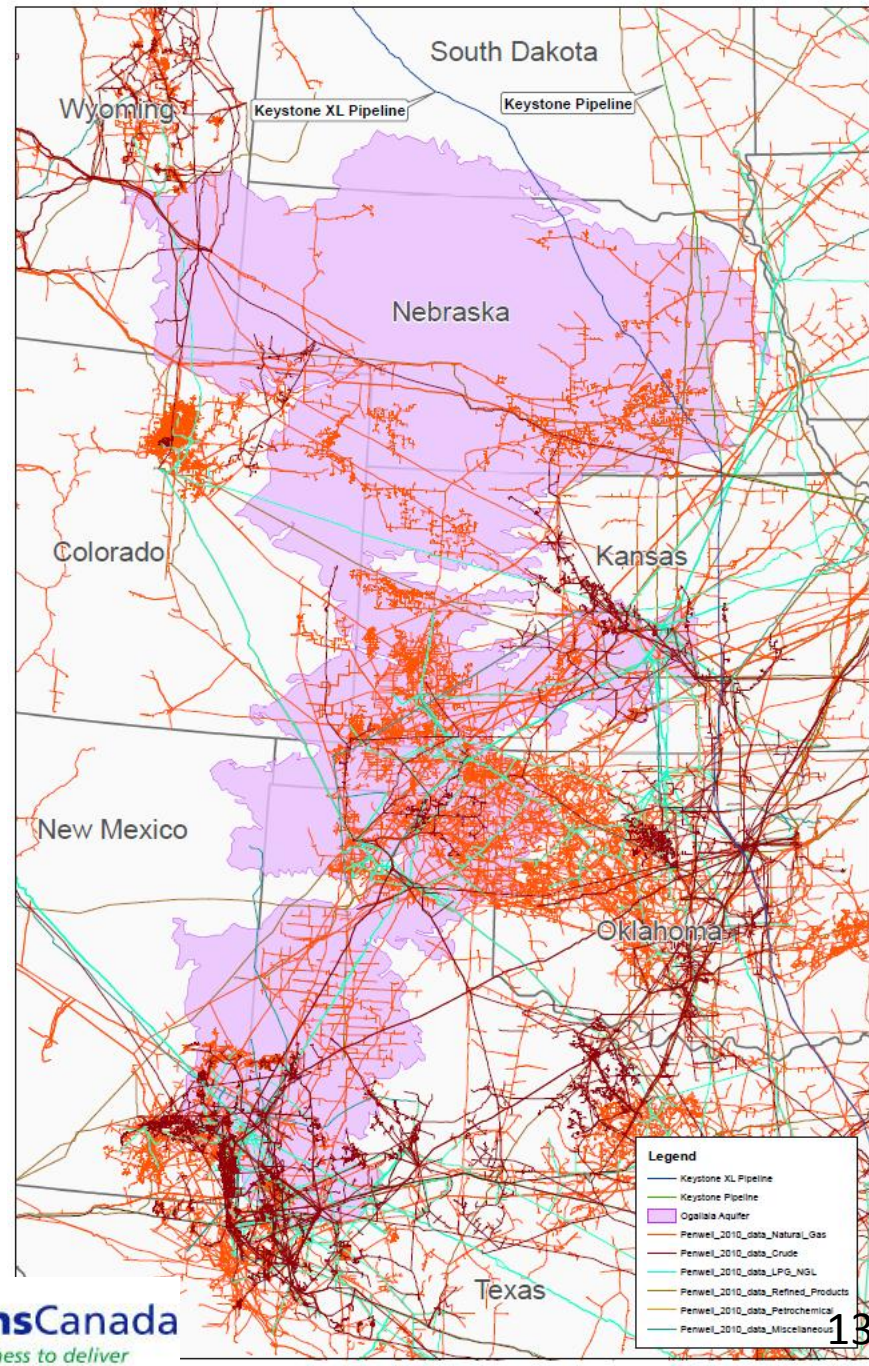
Recent Developments For Post 2011 Crude Oil Transport...

Proposed TransCanada Marketlink

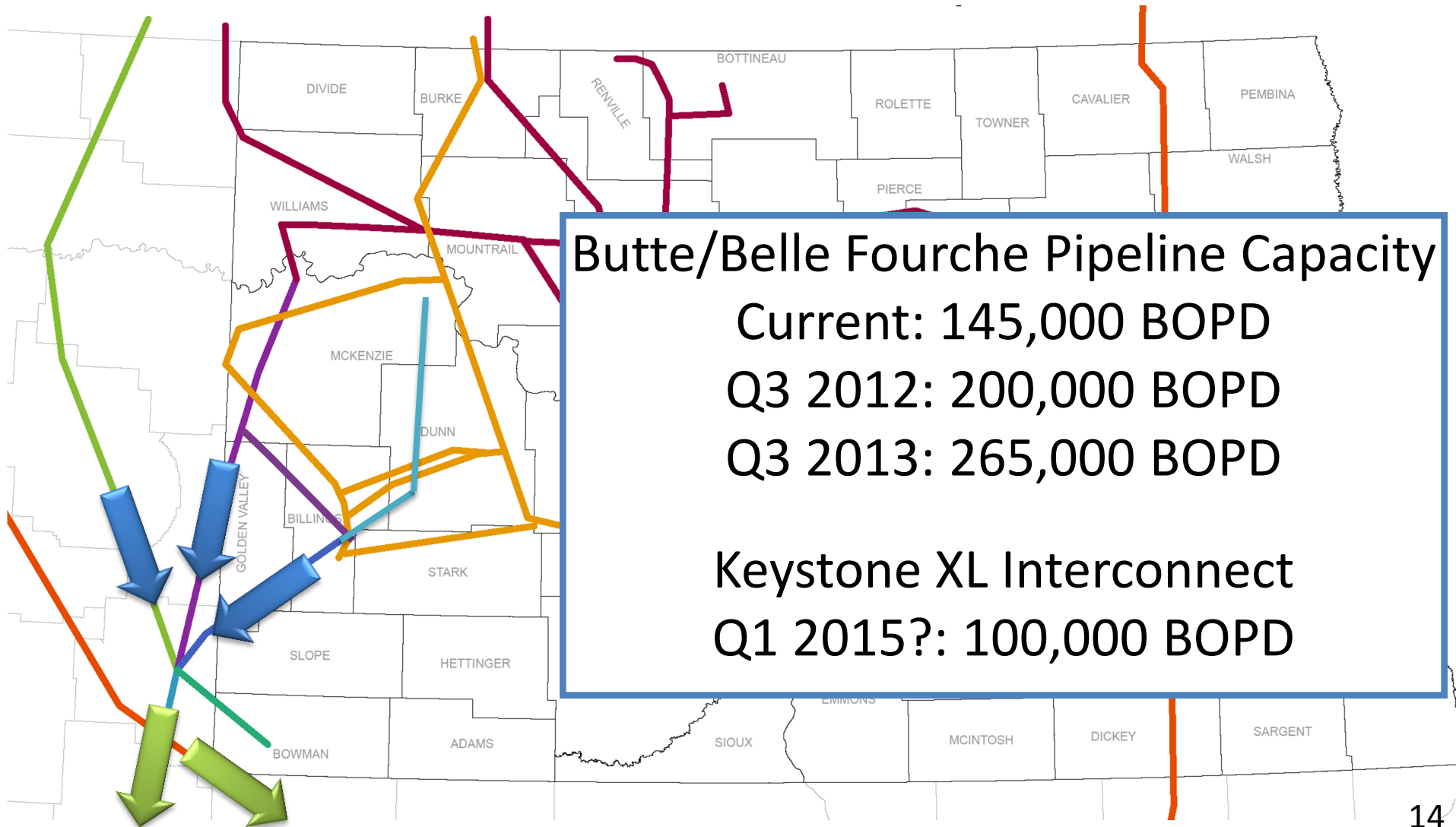
- Successful Open Season in 2010
- 2015? Startup (Subject to Presidential Permit – Q1 2013)

Image: TransCanada Notice of Open Season

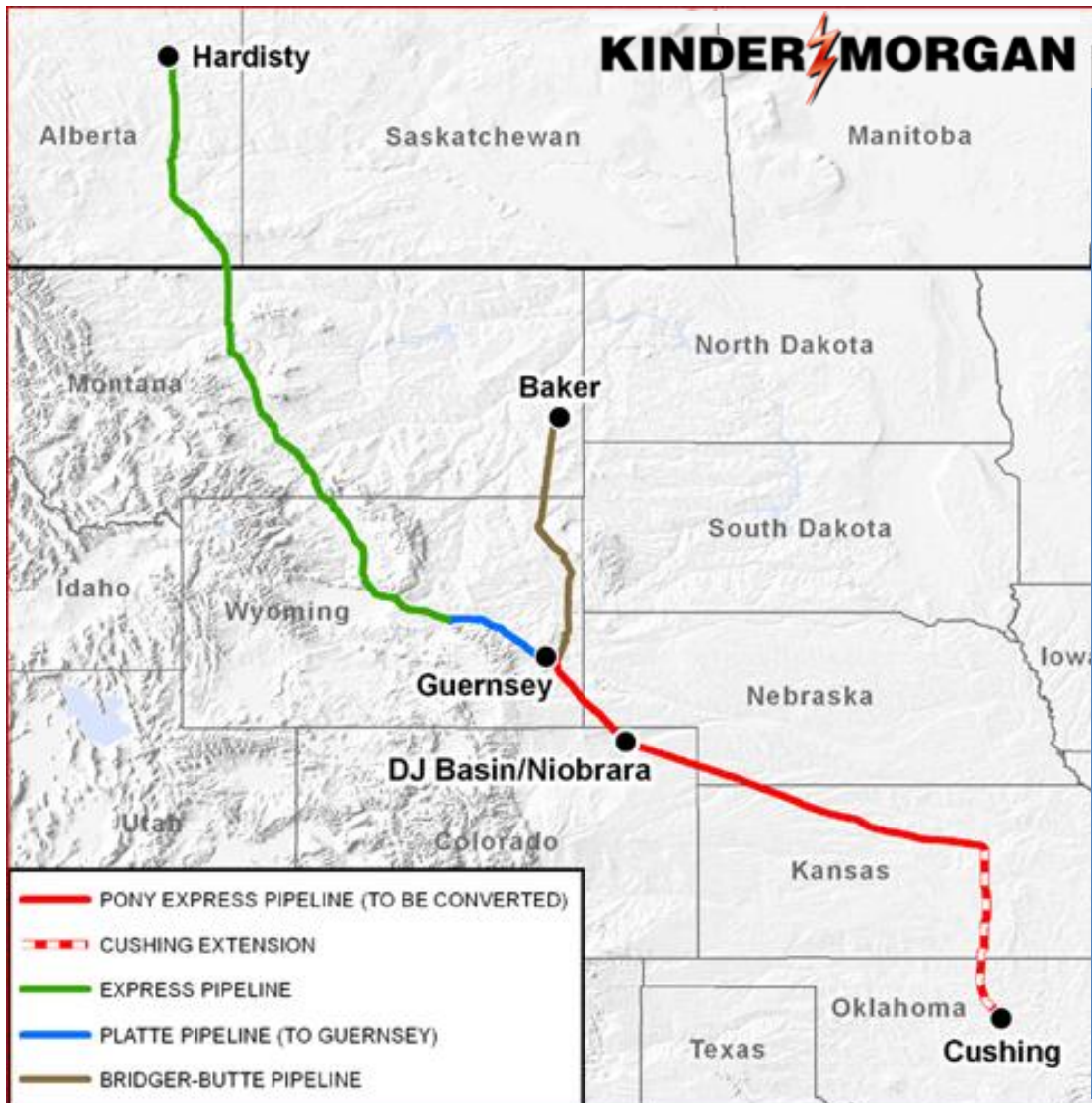




True Co.'s Proposed "Baker 300"



Pony Express Conversion

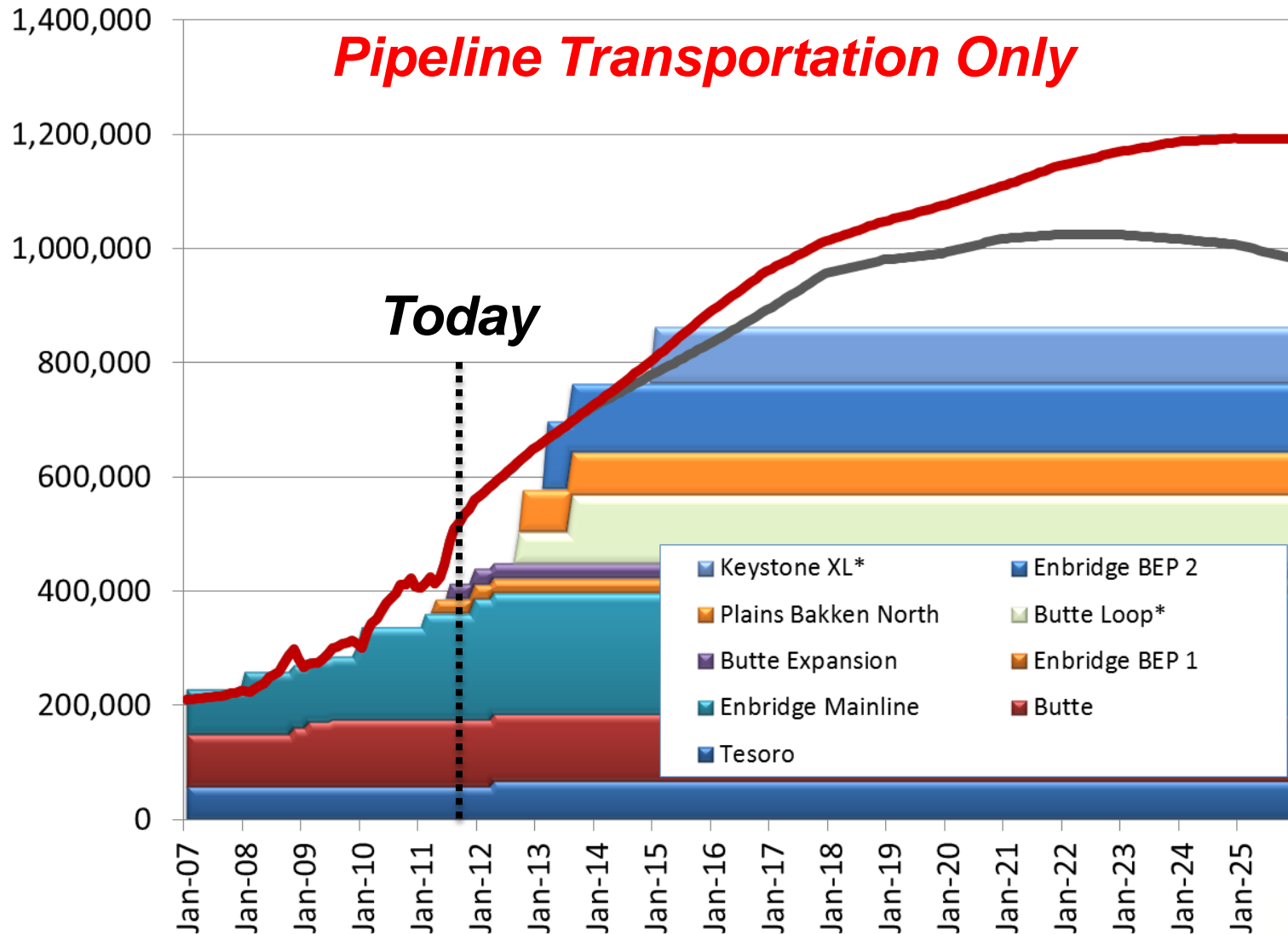


Proposed Capacity
210,000 BOPD
Q1 2014

Convert 500 miles of
natural gas pipeline to oil
service

210 miles of new pipe to
Cushing, OK

Williston Basin Oil Production & Export Capacity, BOPD

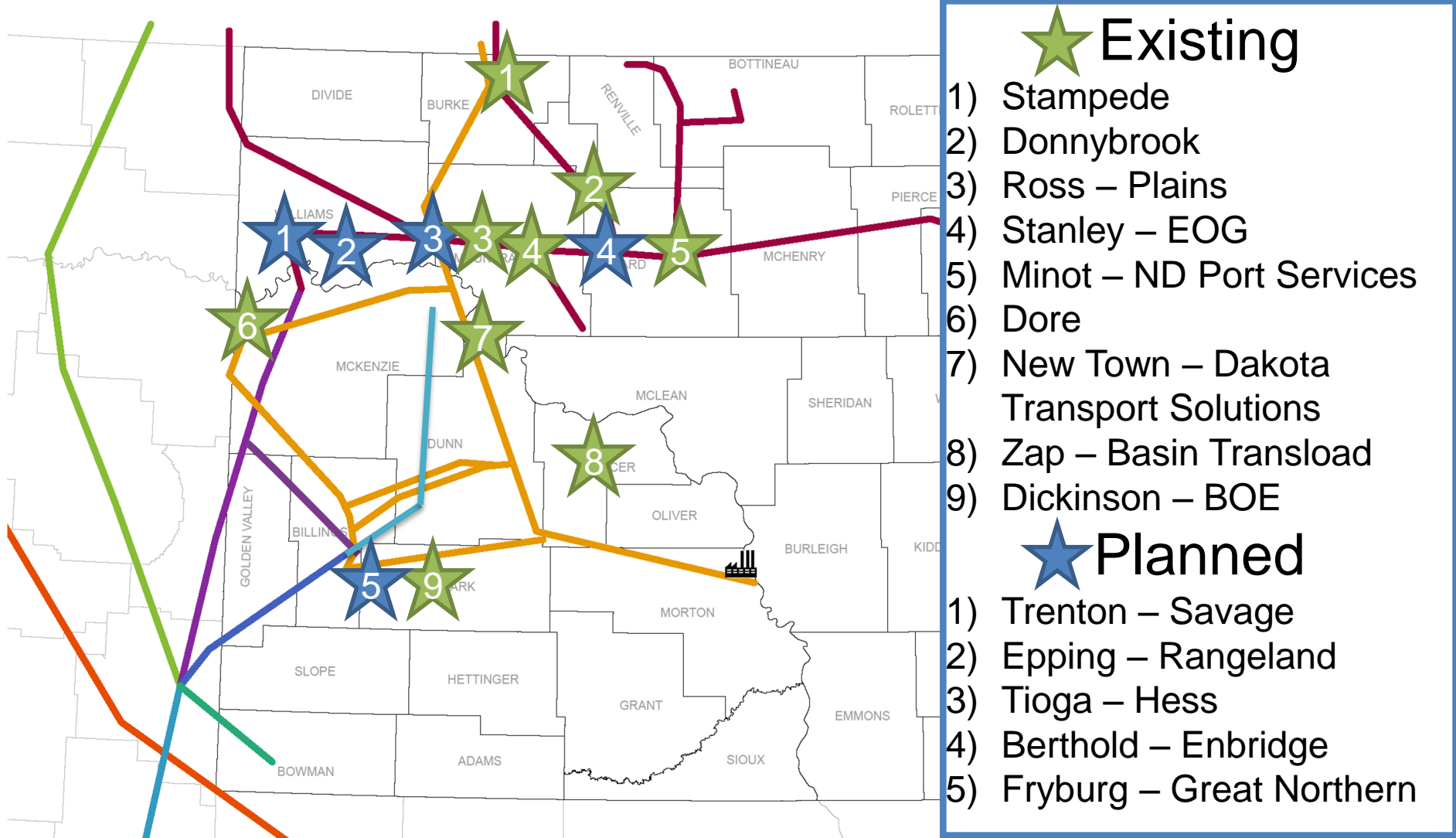


Production forecast is for visual demonstration purposes only and should not be considered accurate for any near or long term planning.

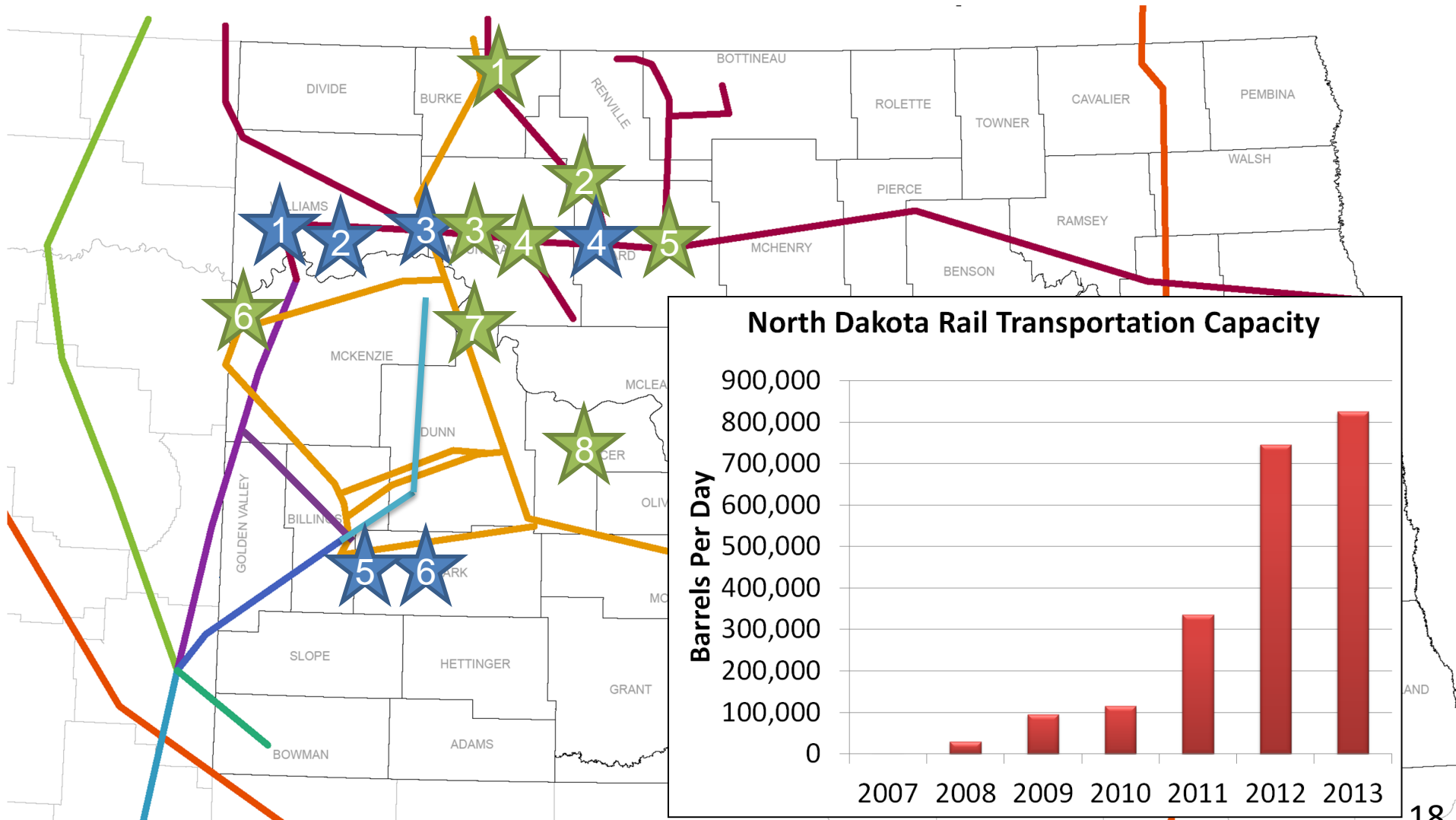
*Projects still in the proposed or internal review process



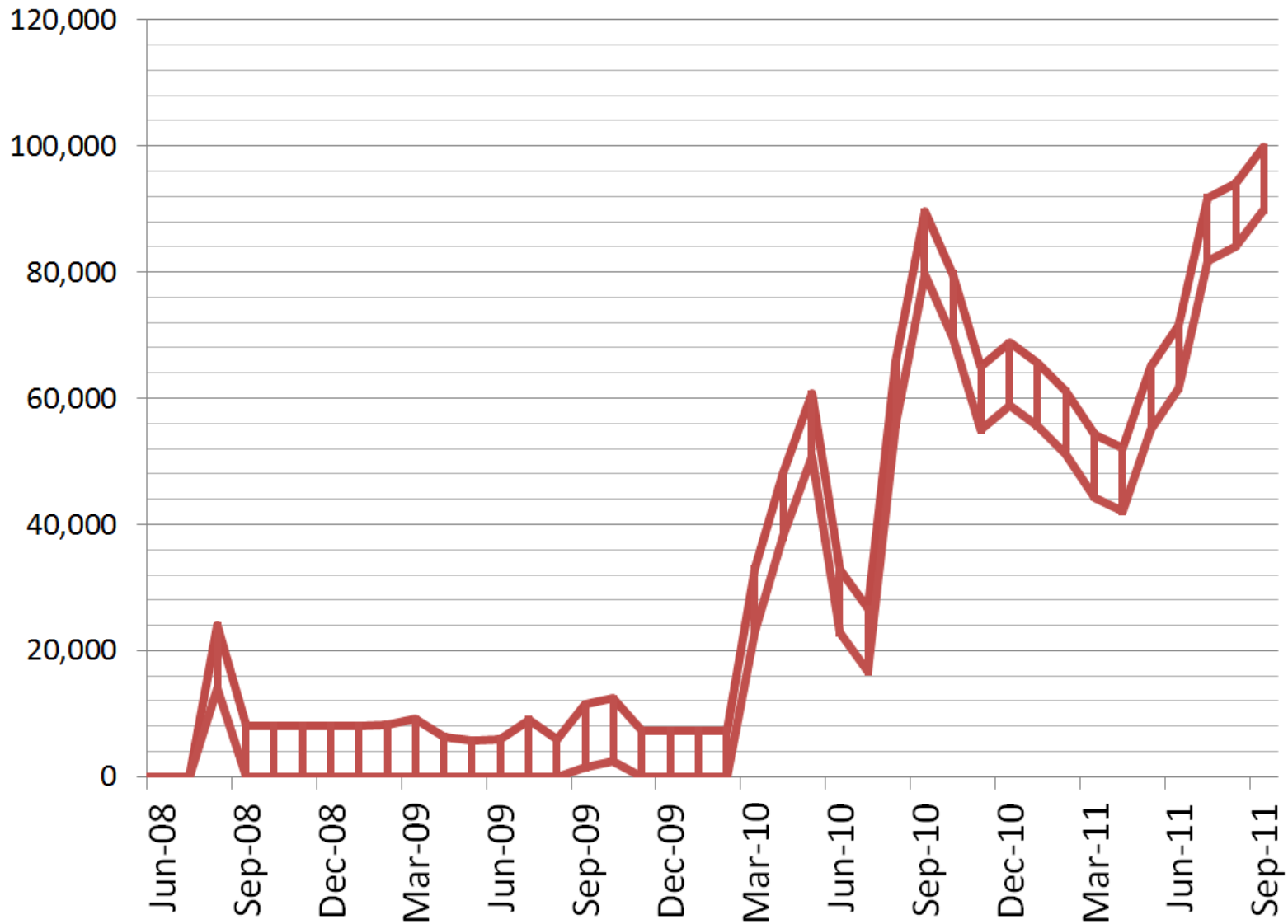
Existing & Planned Rail Locations



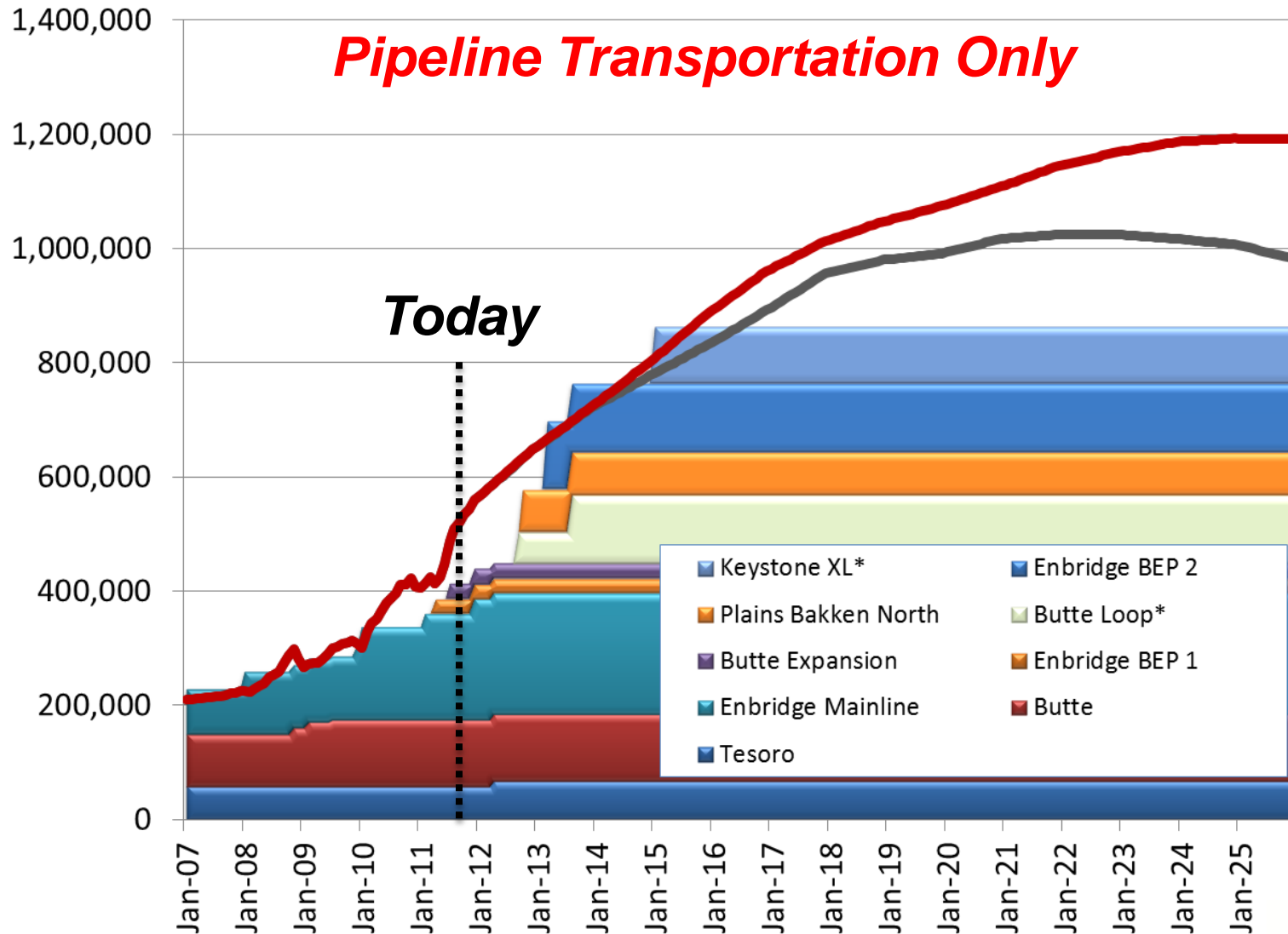
Existing & Planned Rail Locations



High-Low Rail Estimate, BOPD



Williston Basin Oil Production & Export Capacity, BOPD

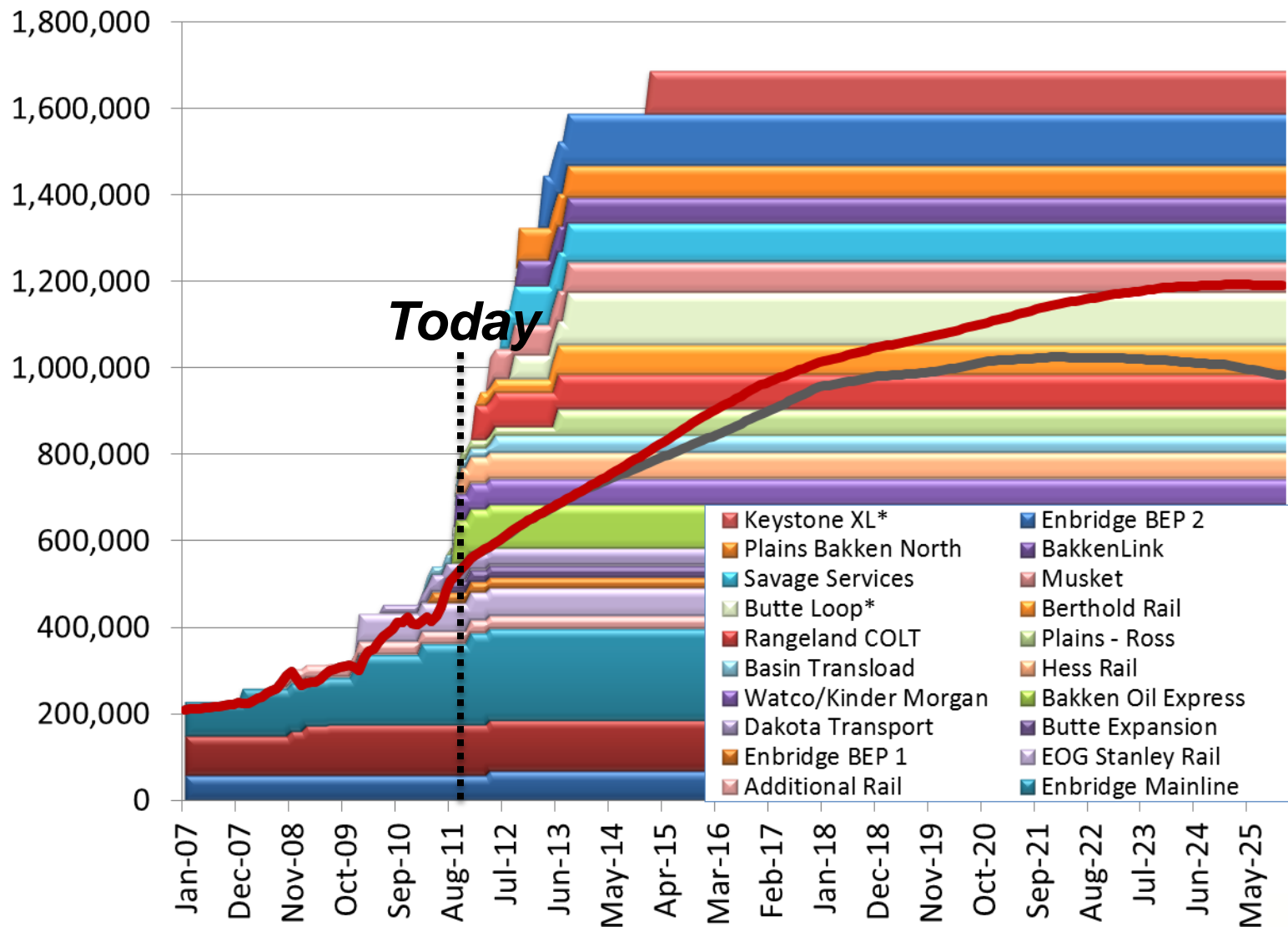


Production forecast is for visual demonstration purposes only and should not be considered accurate for any near or long term planning.

*Projects still in the proposed or internal review process



Williston Basin Oil Production & Export Capacity, BOPD

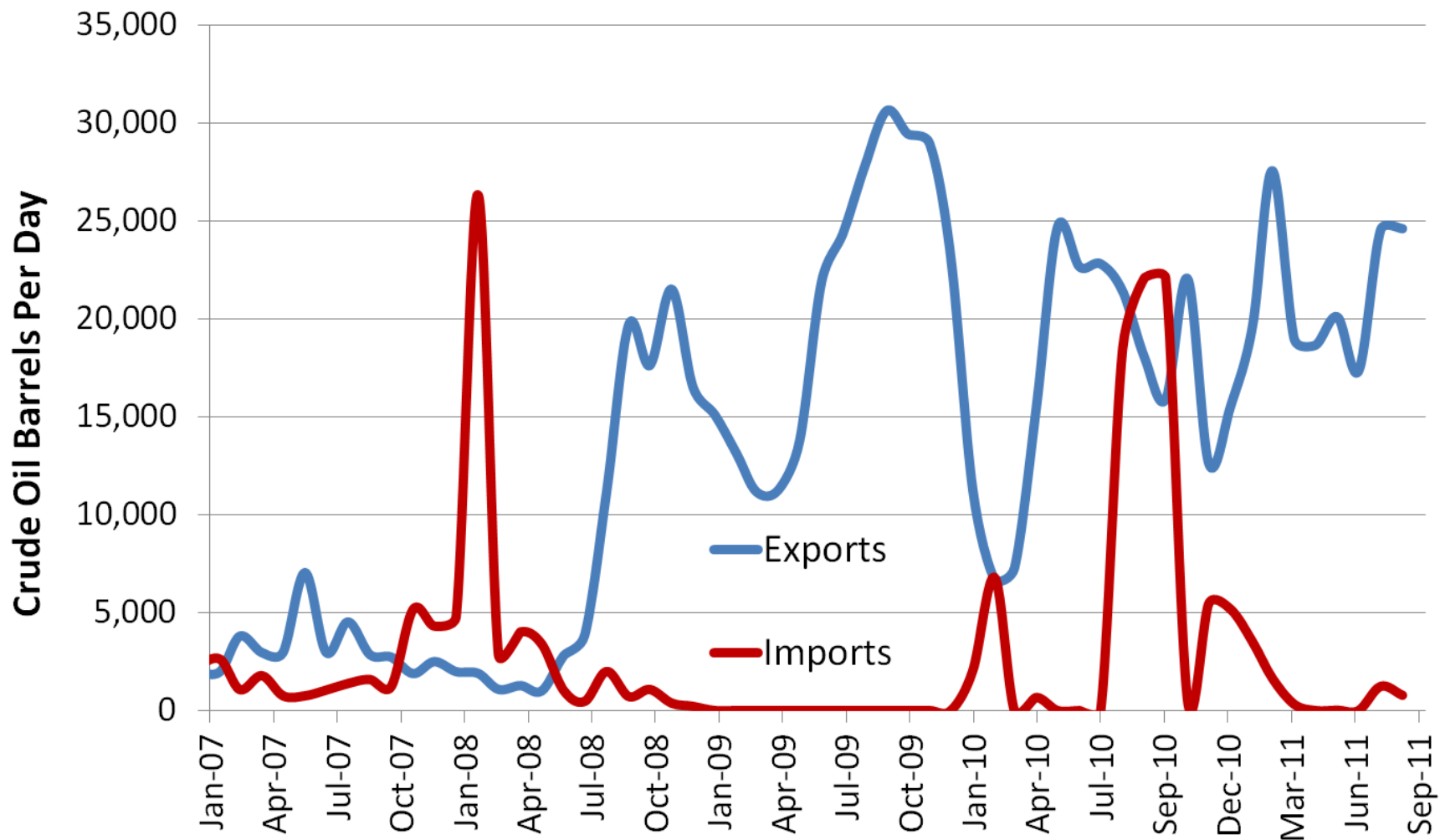


Production forecast is for visual demonstration purposes only and should not be considered accurate for any near or long term planning.

*Projects still in the proposed or internal review process

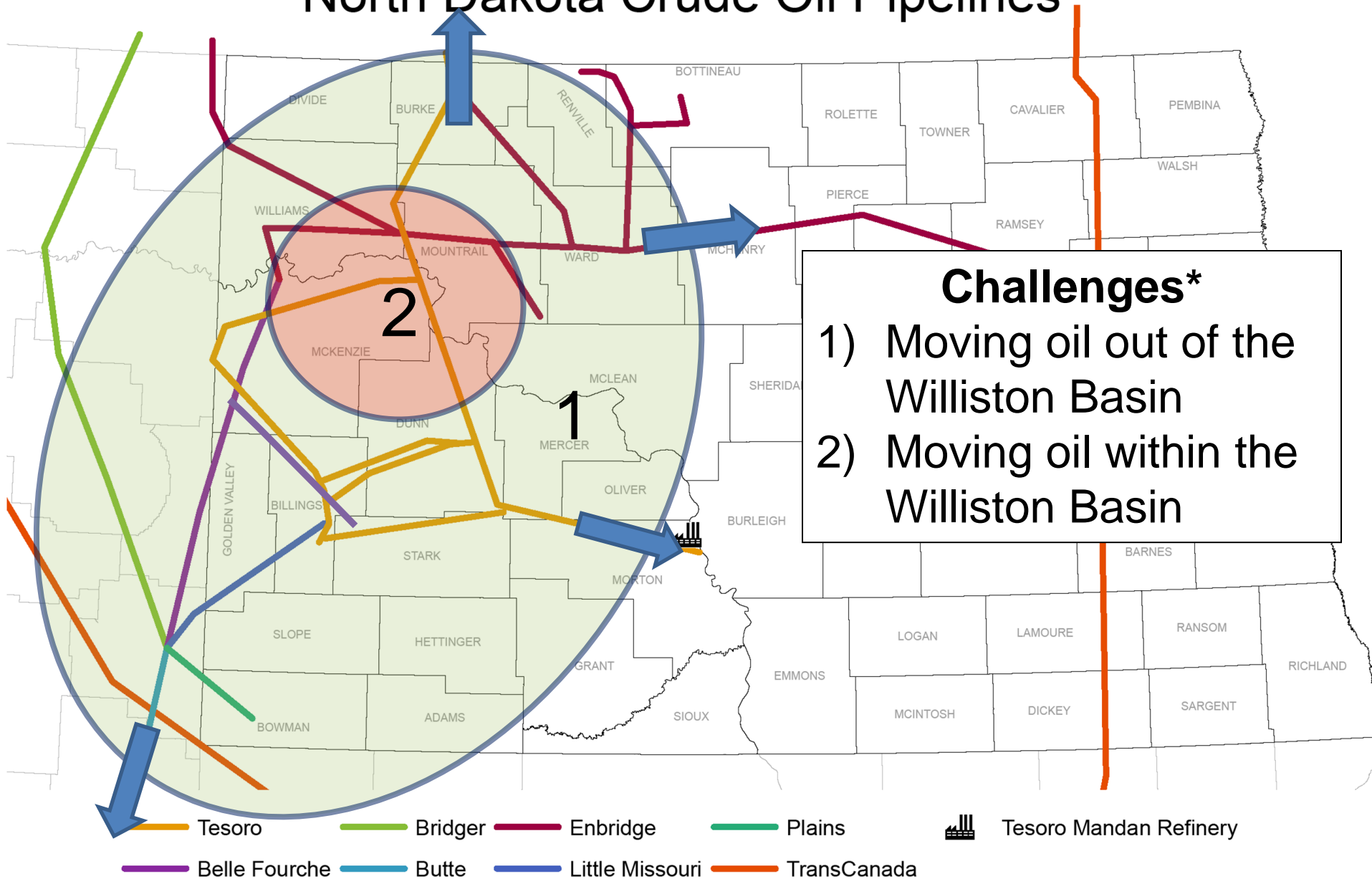


Williston Basin Truck Imports/Exports



Information collected through the United States International Trade Commission's *Interactive Tariff and Trade DataWeb*

North Dakota Crude Oil Pipelines

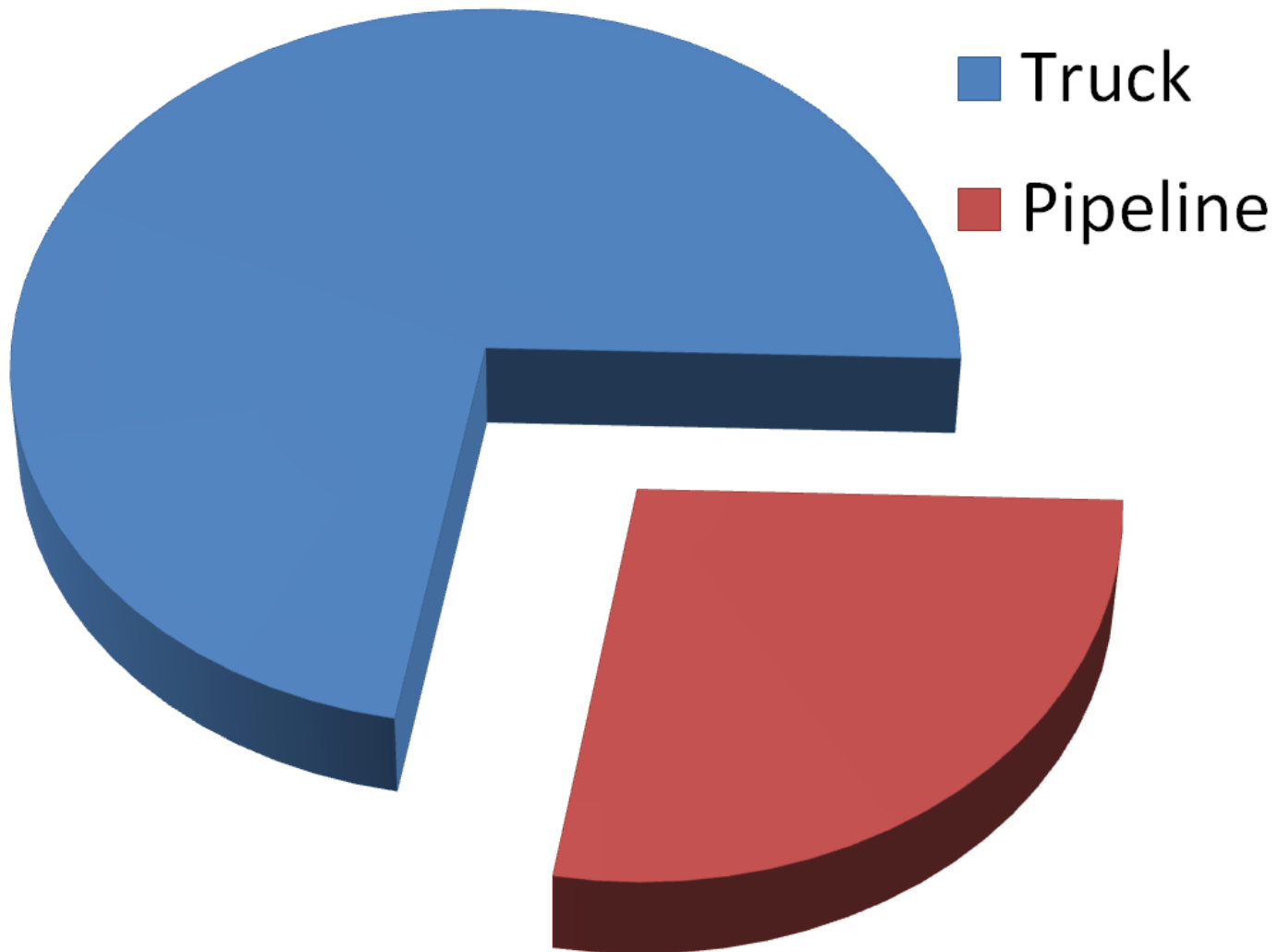


*Modified from Bridger and Belle Fourche Pipelines

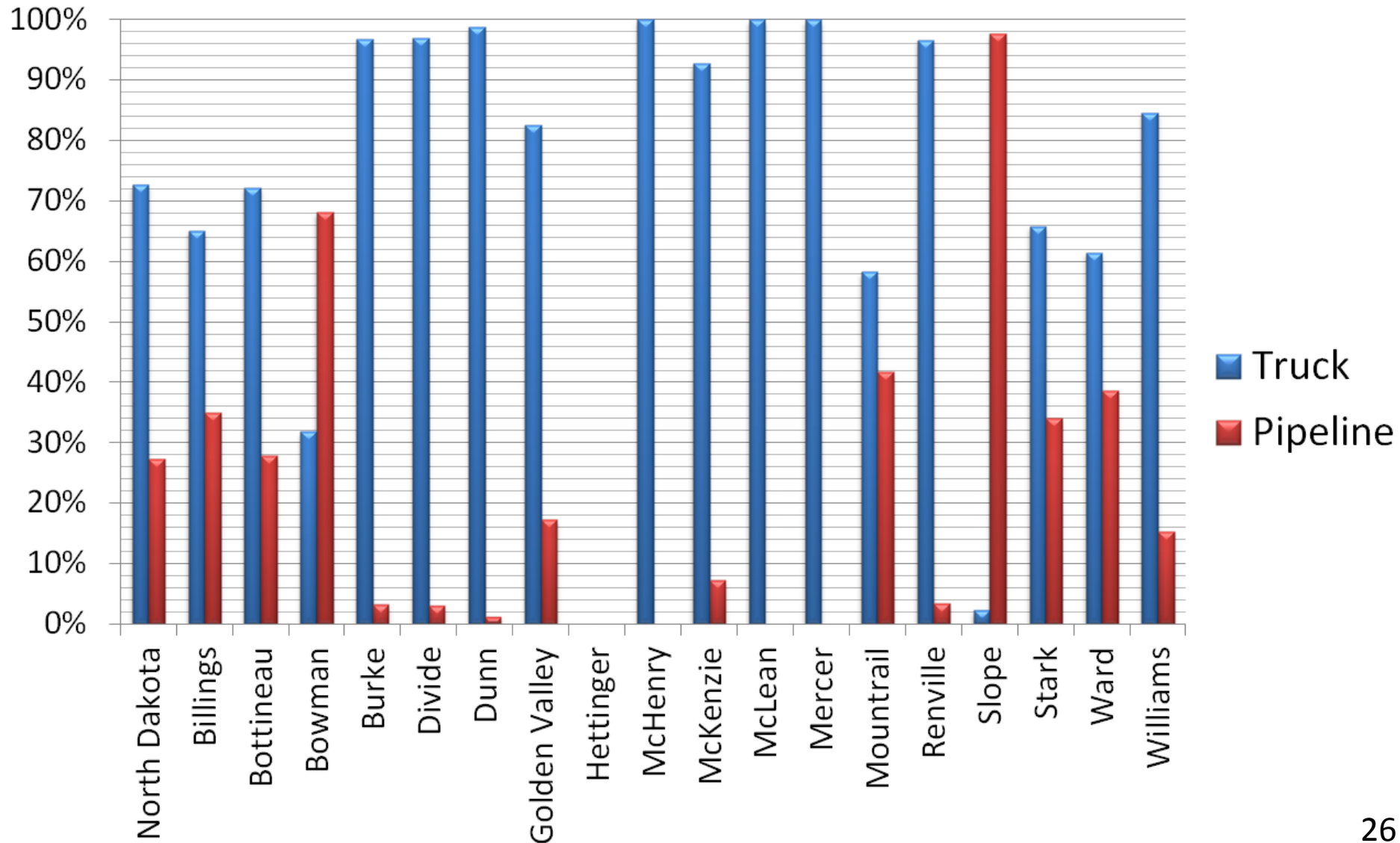
North Dakota Crude Gathering



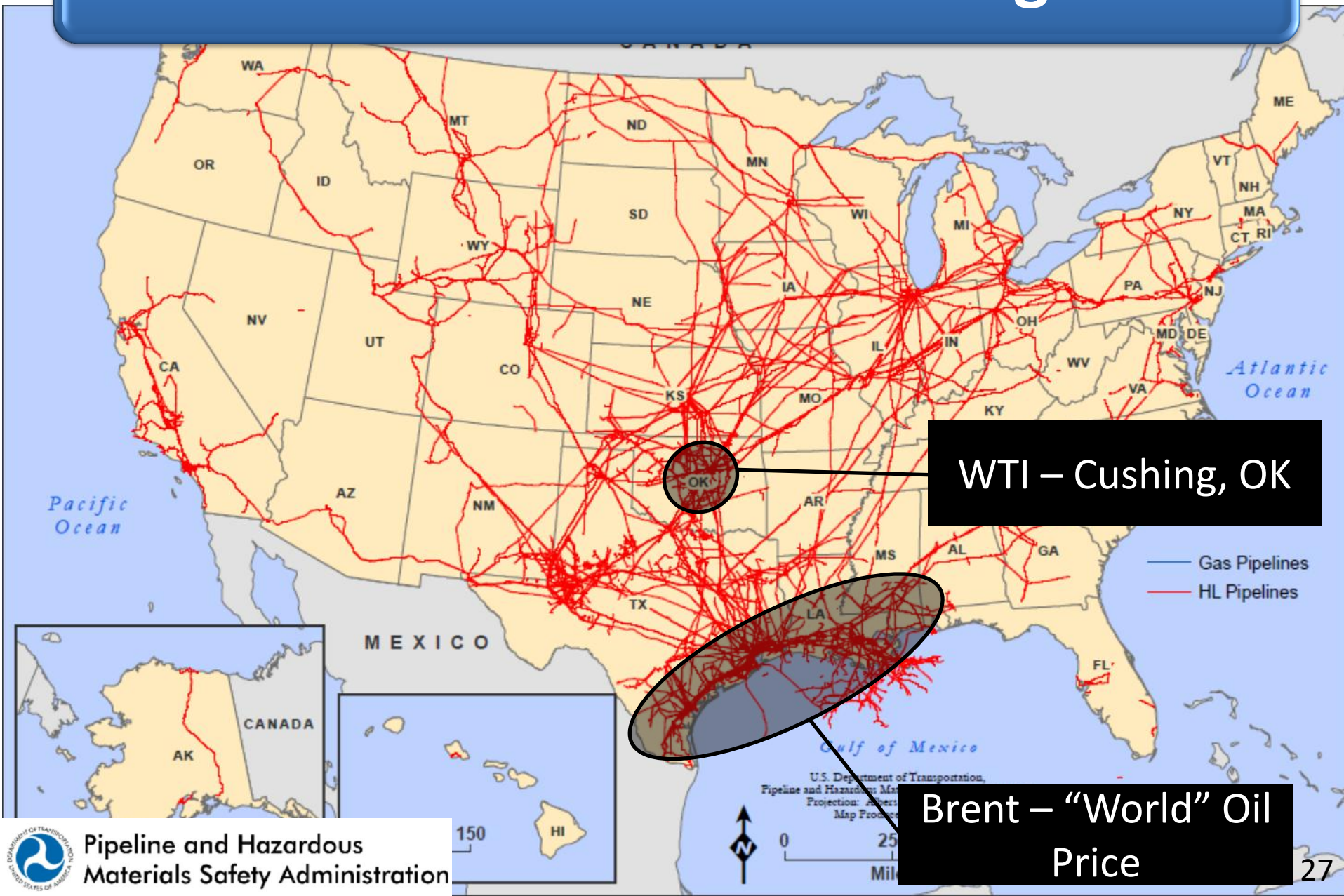
North Dakota Crude Gathering



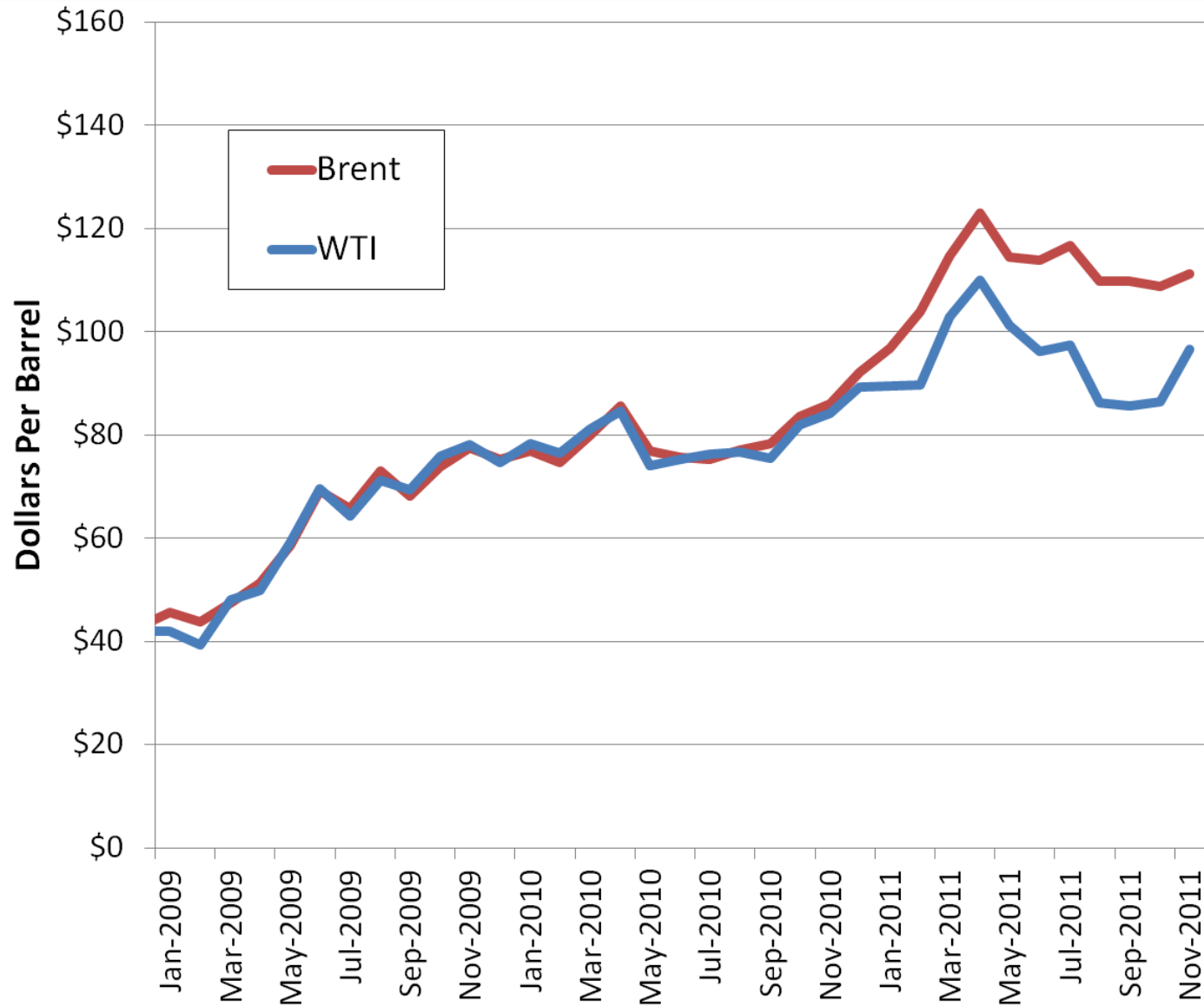
Crude Gathering By County



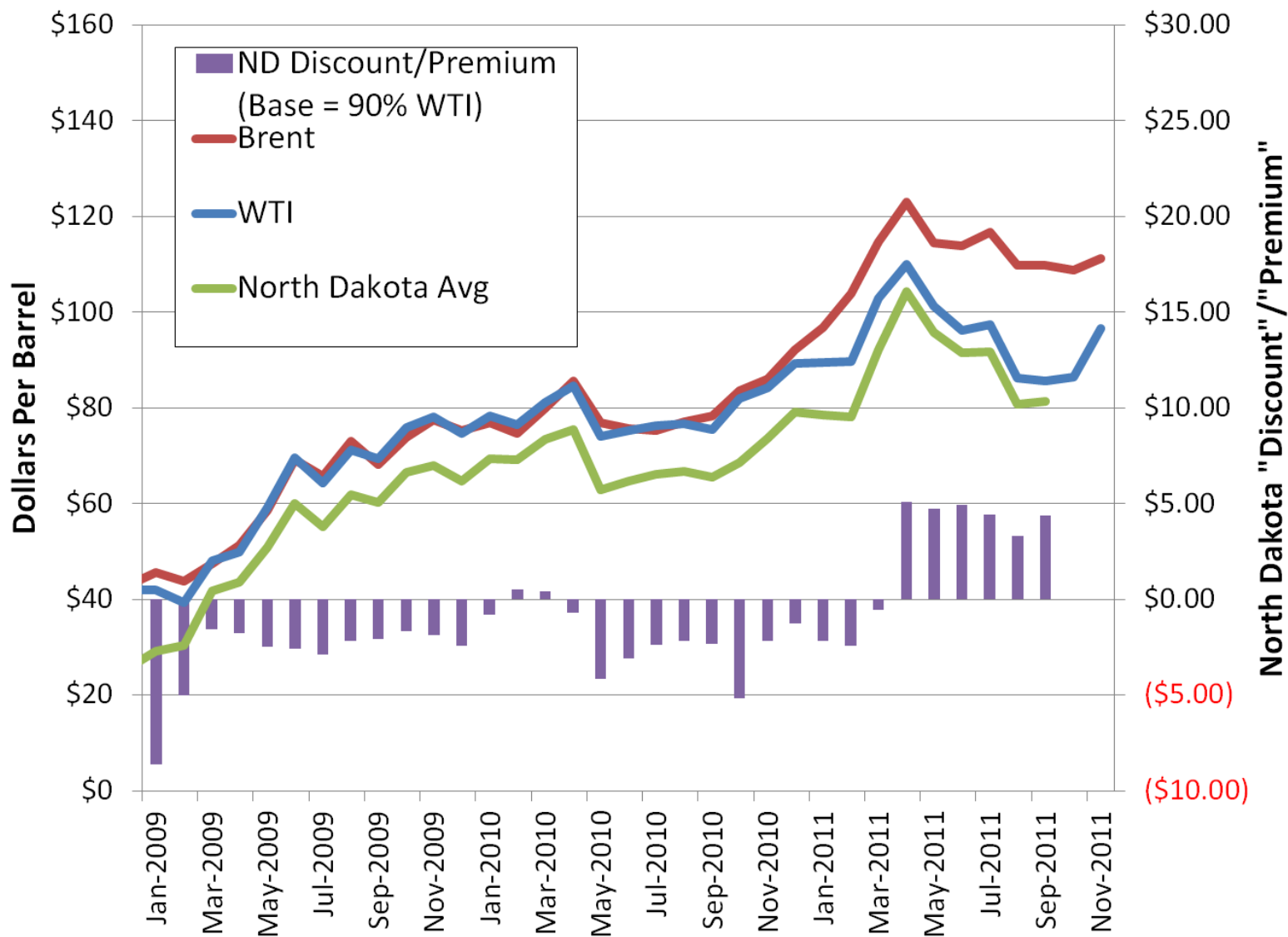
Brent-WTI Crude Pricing



Brent-WTI Crude Pricing



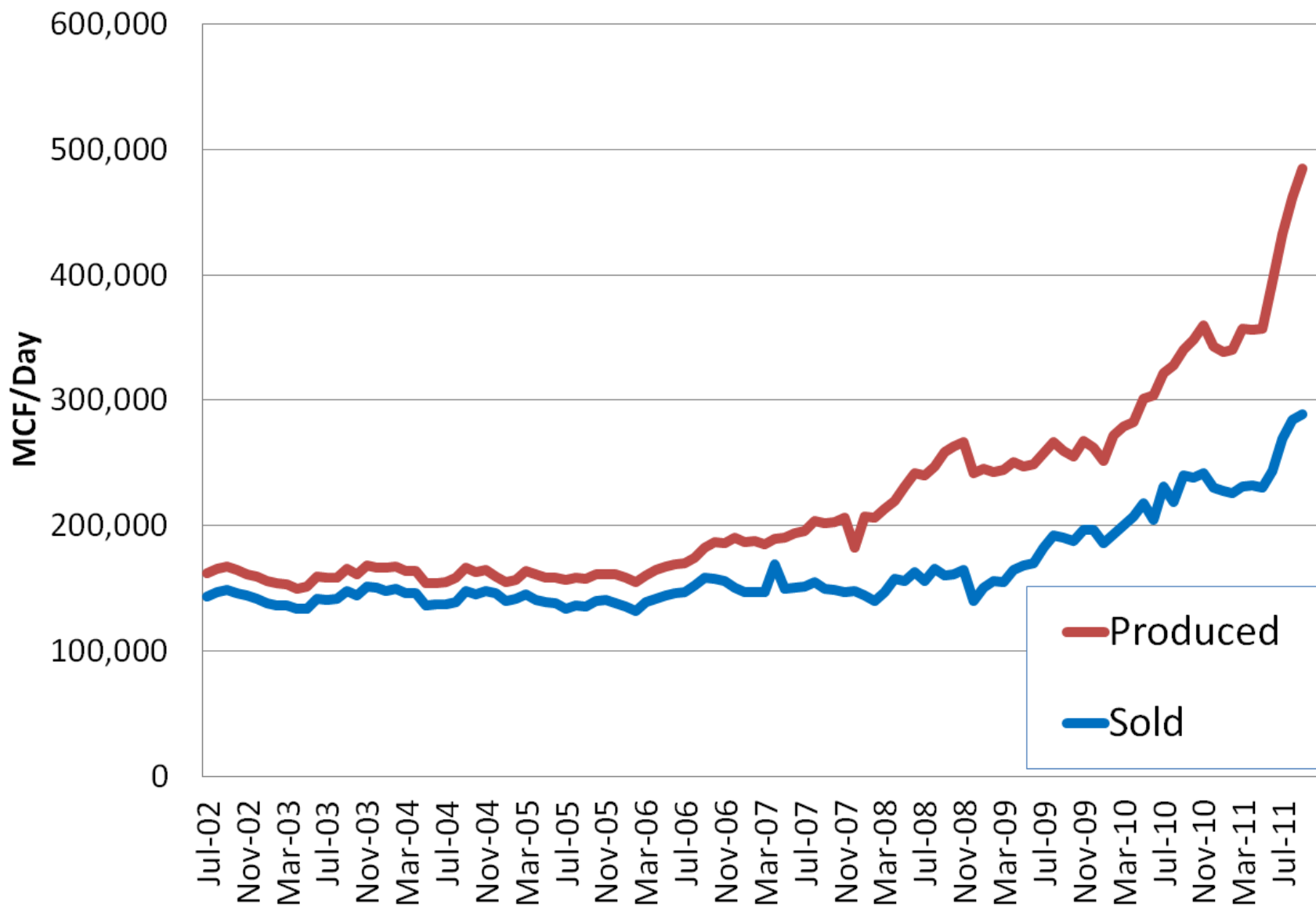
Brent-WTI-ND Crude Pricing



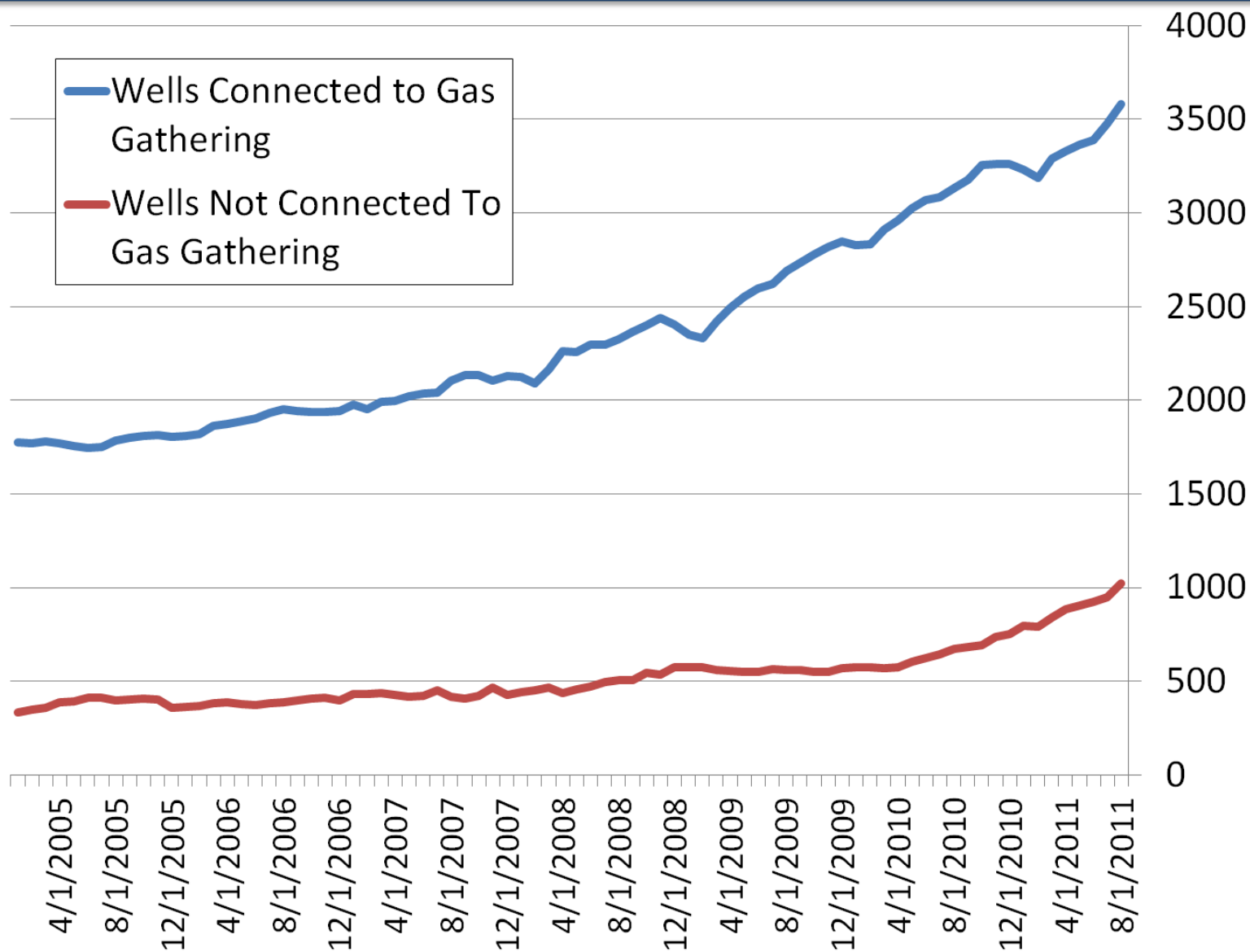
Natural Gas Projects



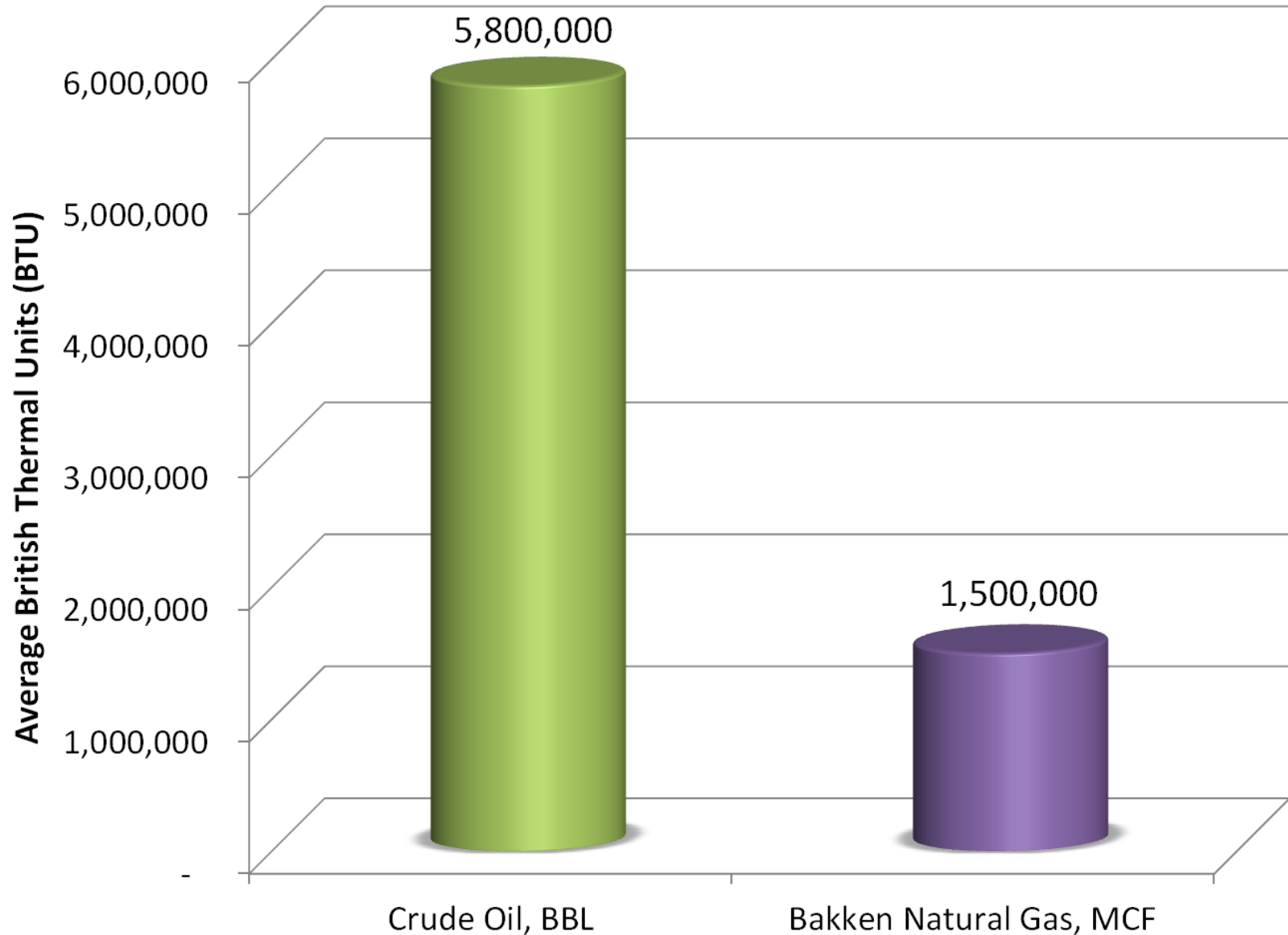
ND Gas Production



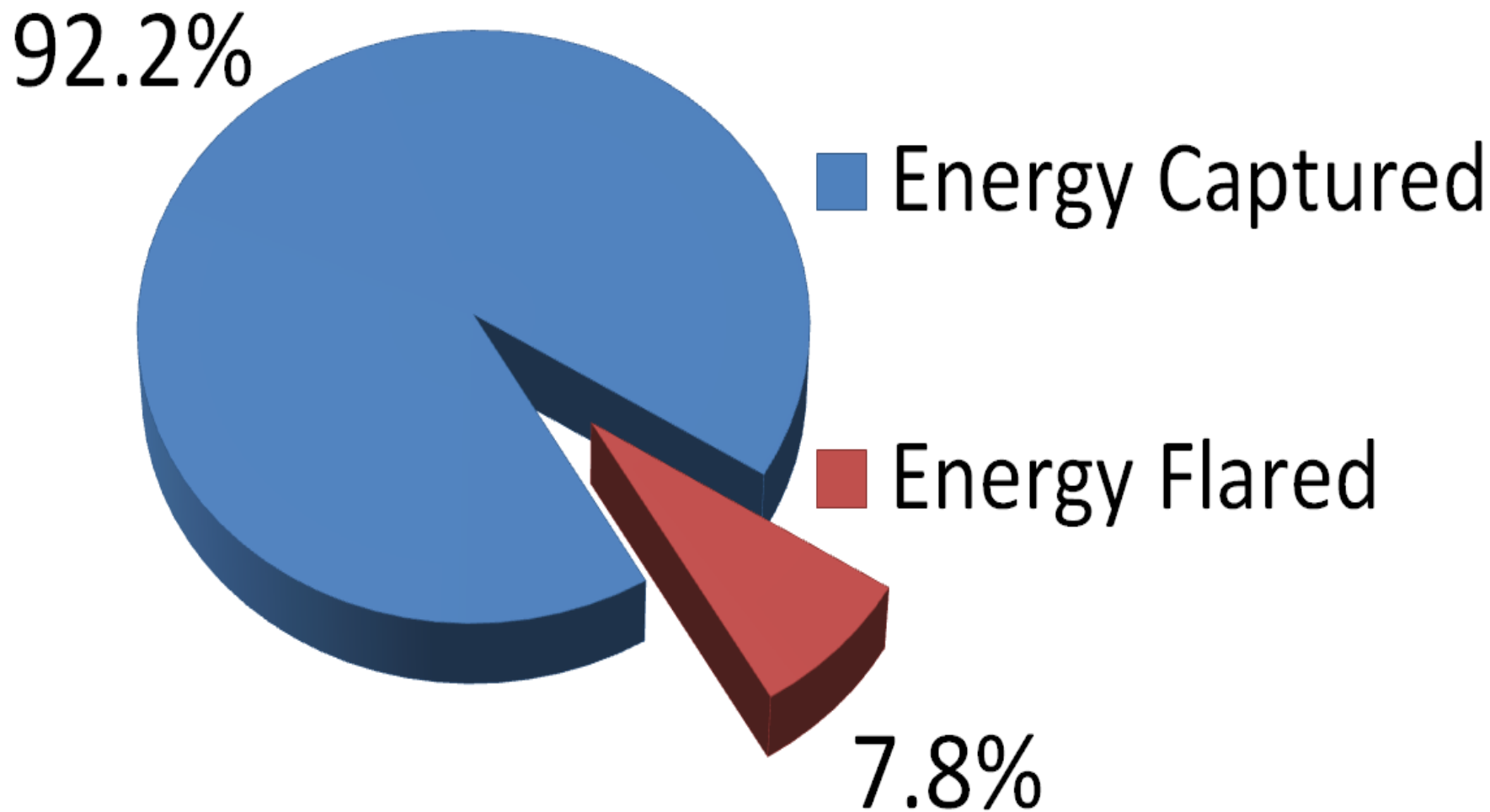
ND Gas Gathering Statistics



Bakken Resource Energy Content



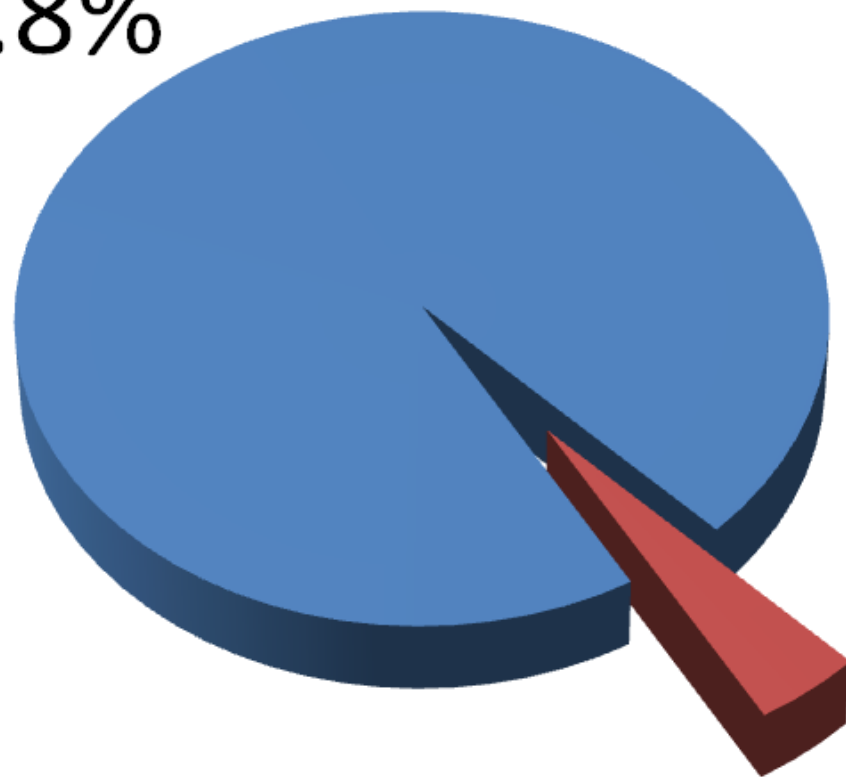
ND Oil & Gas Development Efficiency



September 2011 Data

ND Oil & Gas Development Efficiency

95.8%



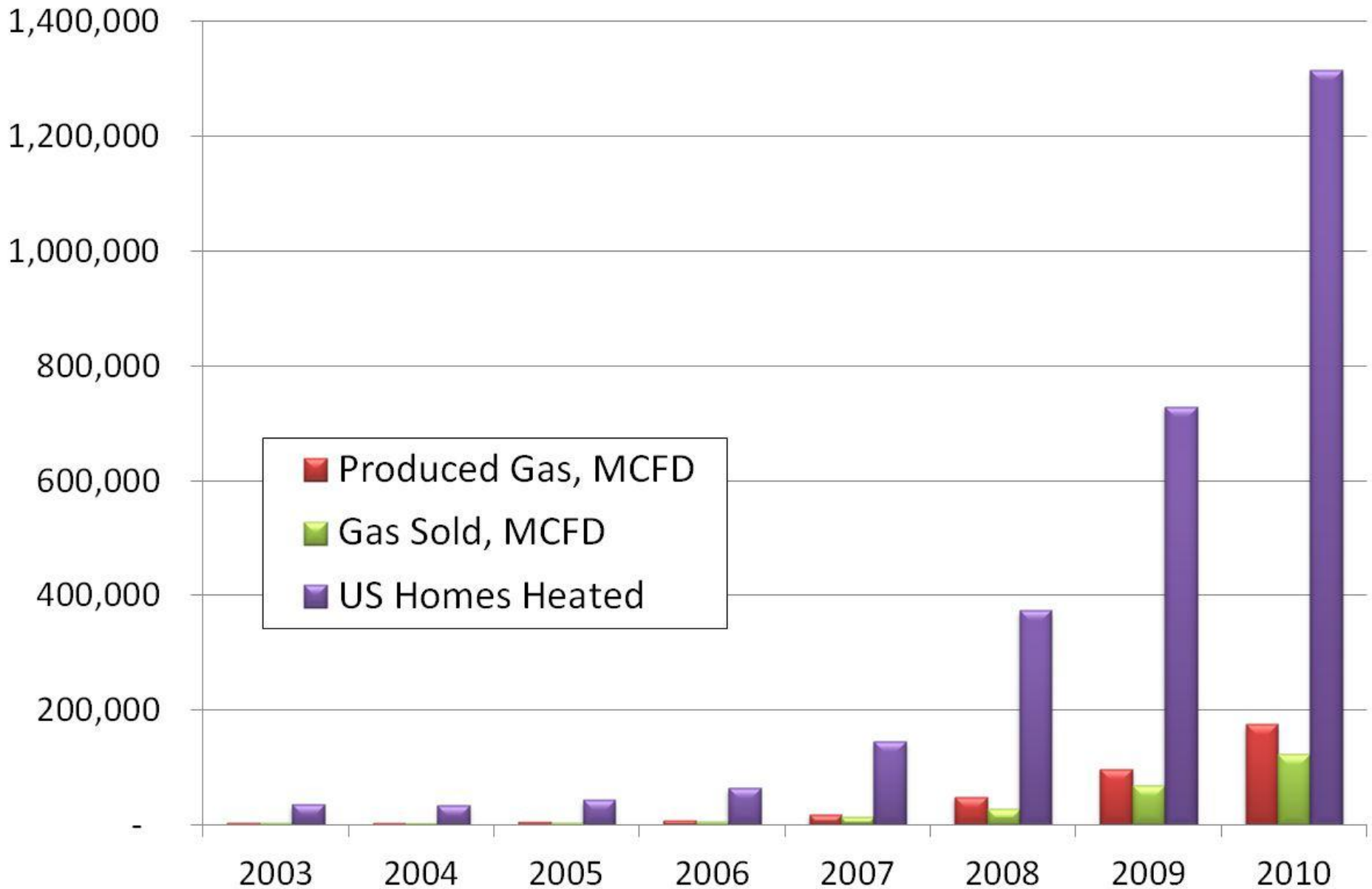
■ Economic Value Captured

■ Economic Value Flared

4.2%

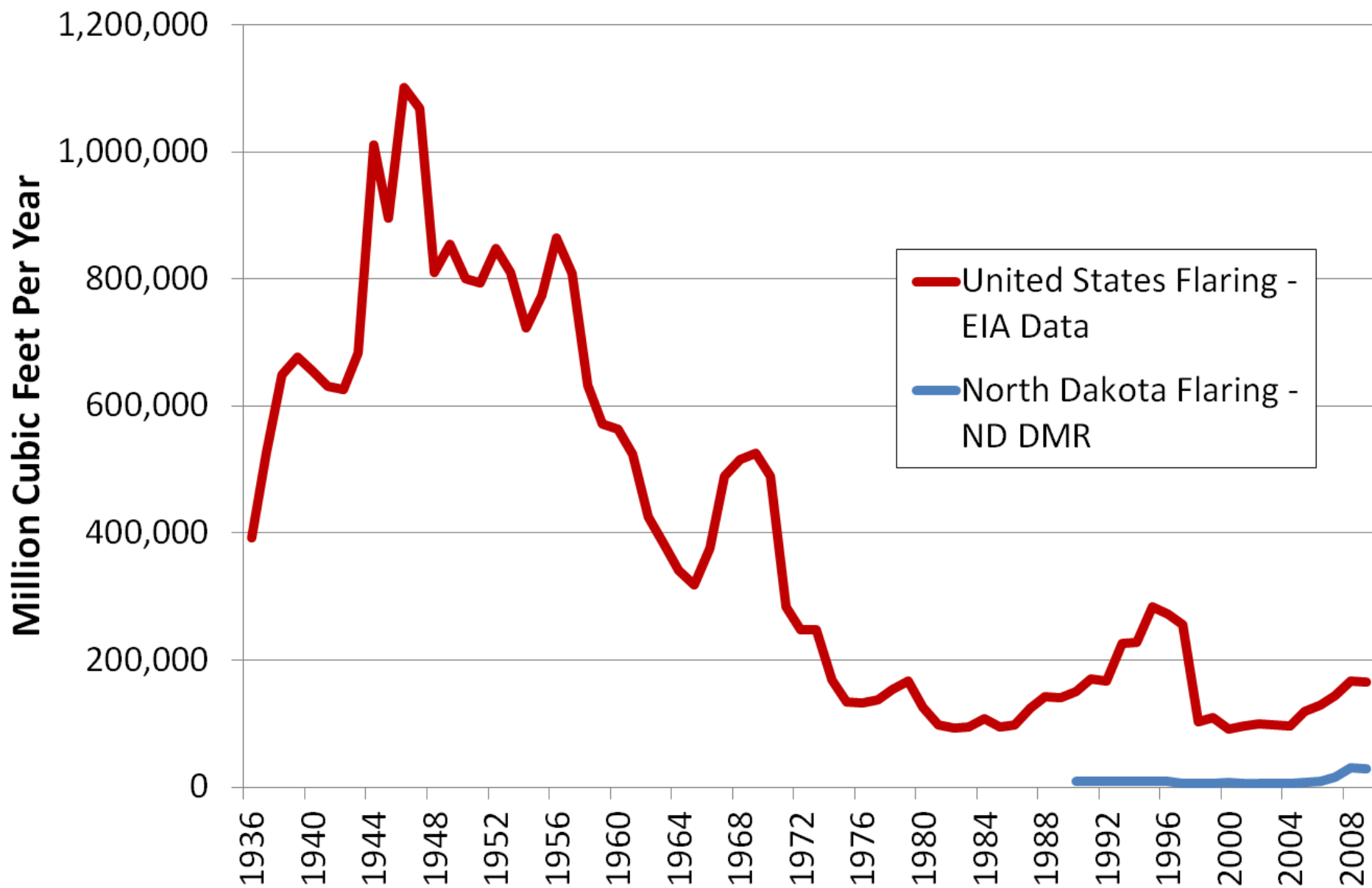
September 2011 Production Data, Oil Price of \$81.38/bbl,
Est. Natural Gas/NGL Wellhead Price of \$10.00/MCF

Bakken & Three Forks Natural Gas



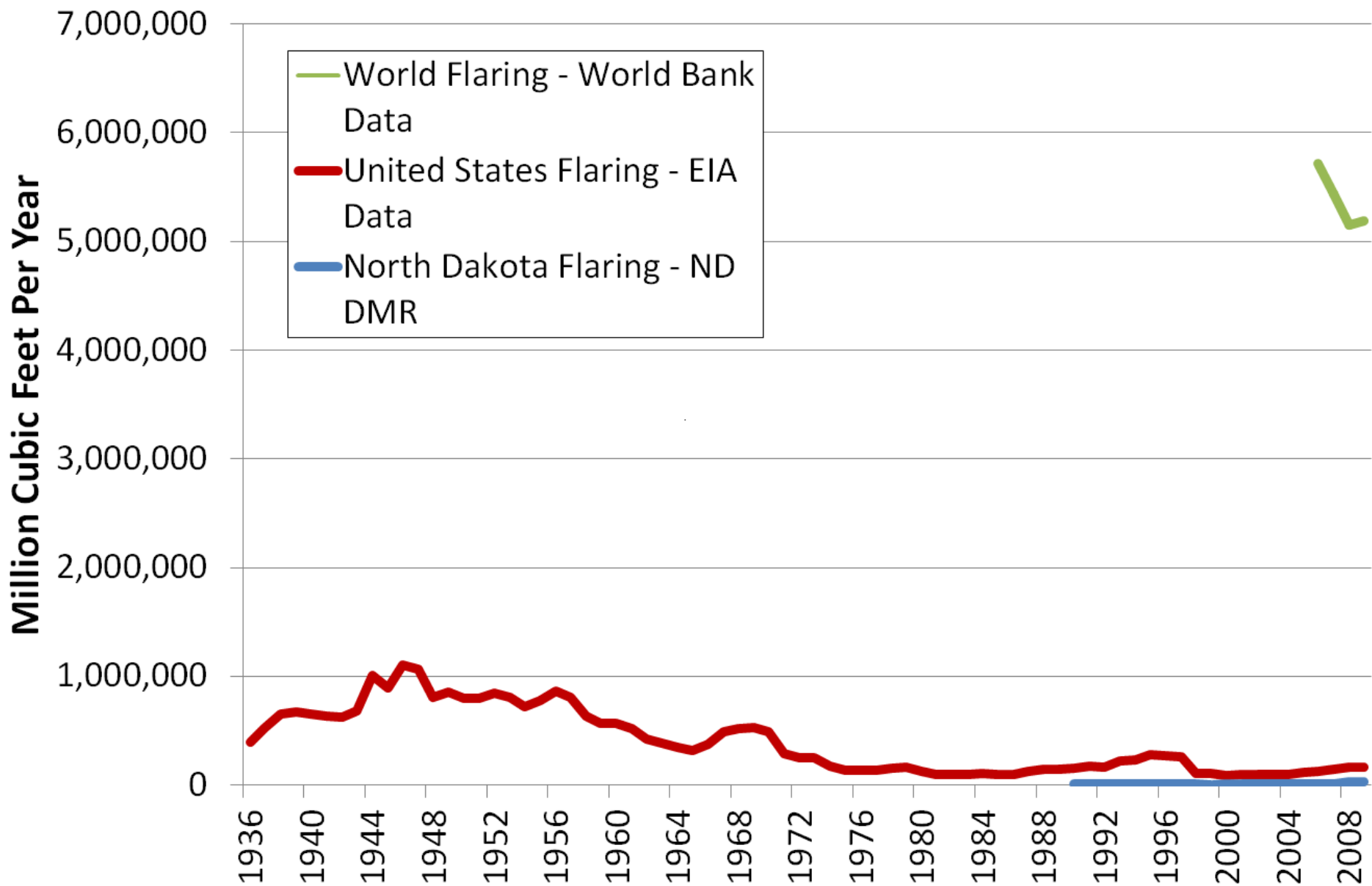
Assumes Avg Home Uses 72.4 Million BTU's Per Year - Source: AGA

United States - North Dakota Natural Gas Flaring



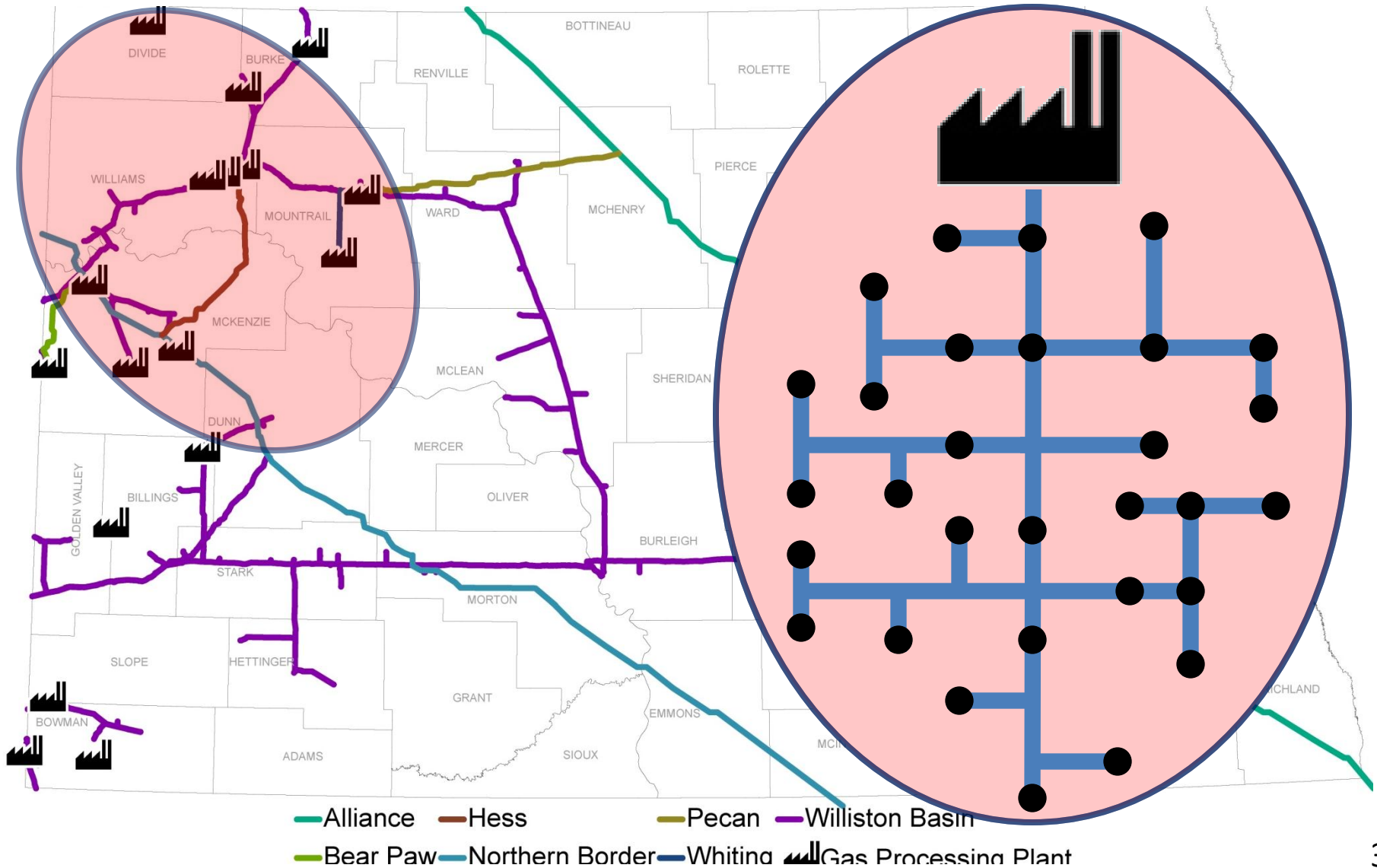
Data: Most Recently Available US EIA Data and ND Department of Mineral Resources

World Natural Gas Flaring

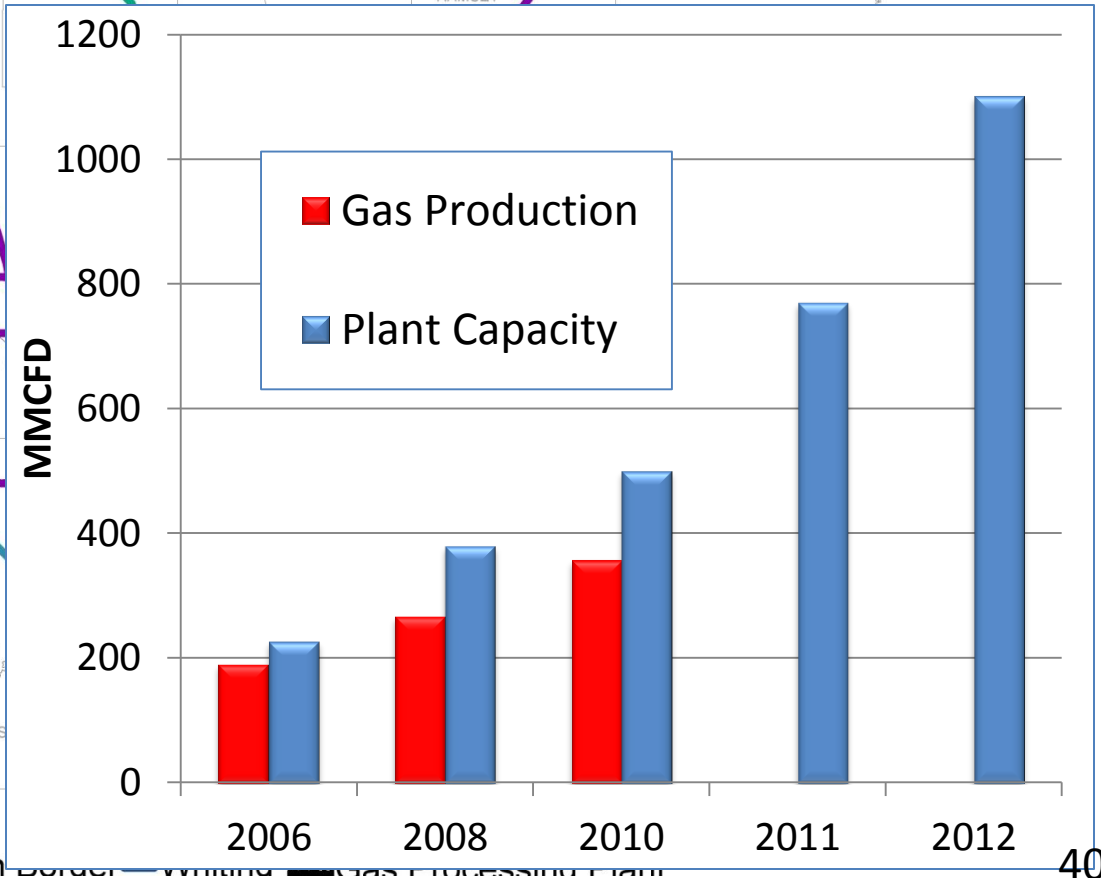
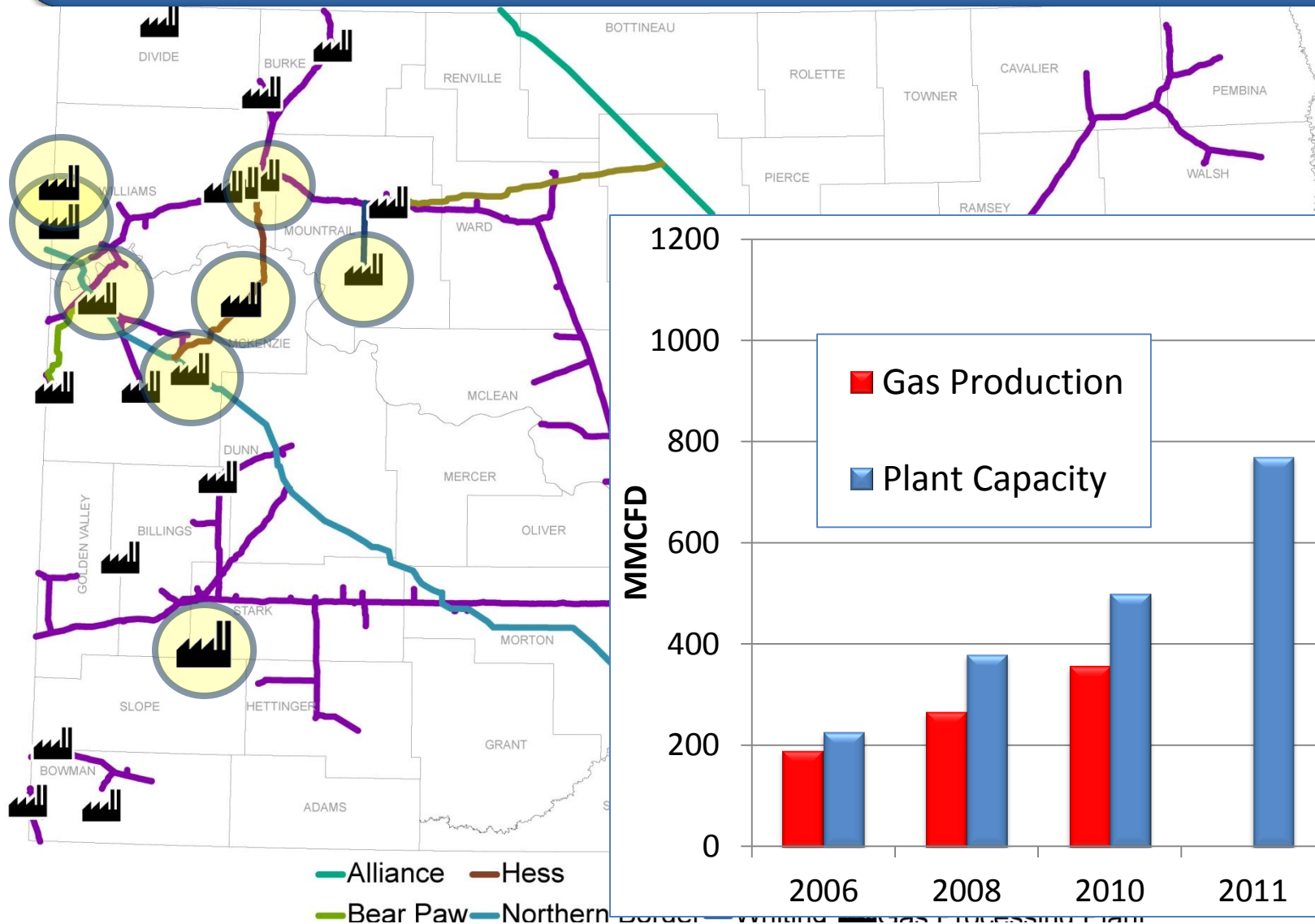


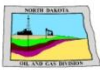
Data Source: World Bank, Most Recently Available US EIA Data, and ND Department of Mineral Resources

Natural Gas Challenge I



New or Expanding Gas Plants

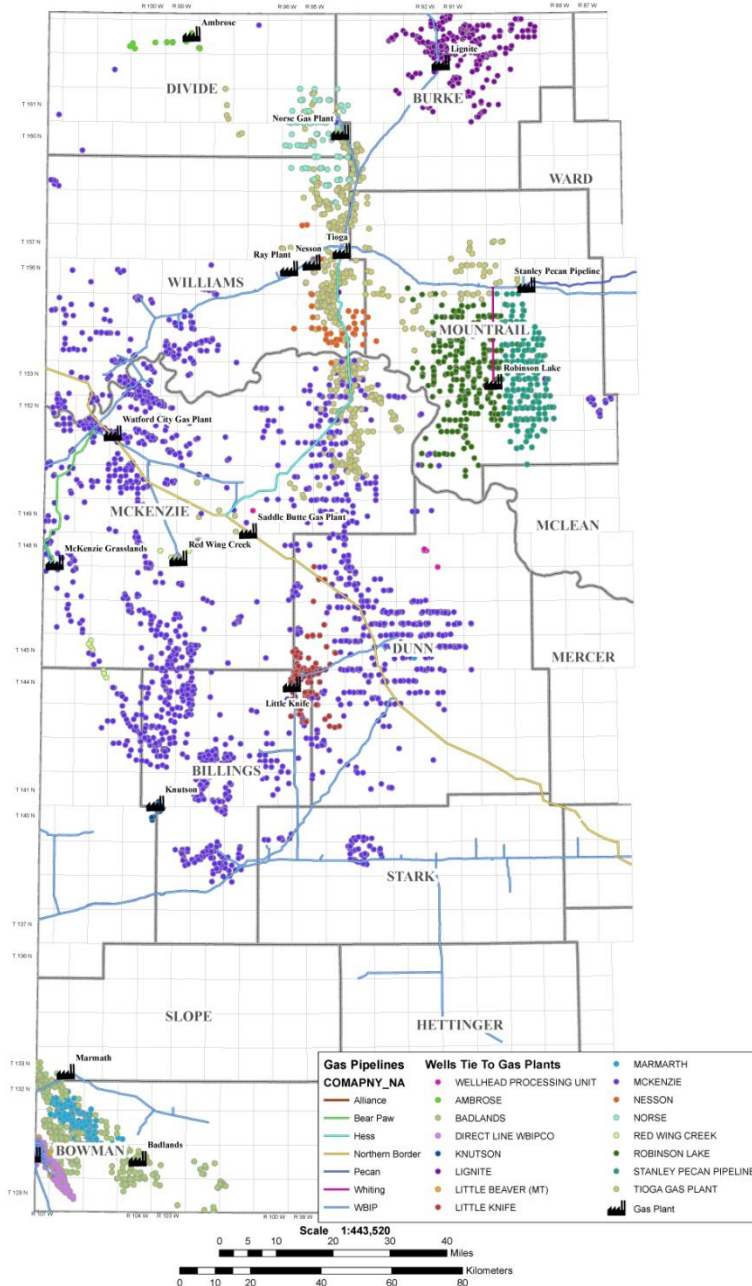




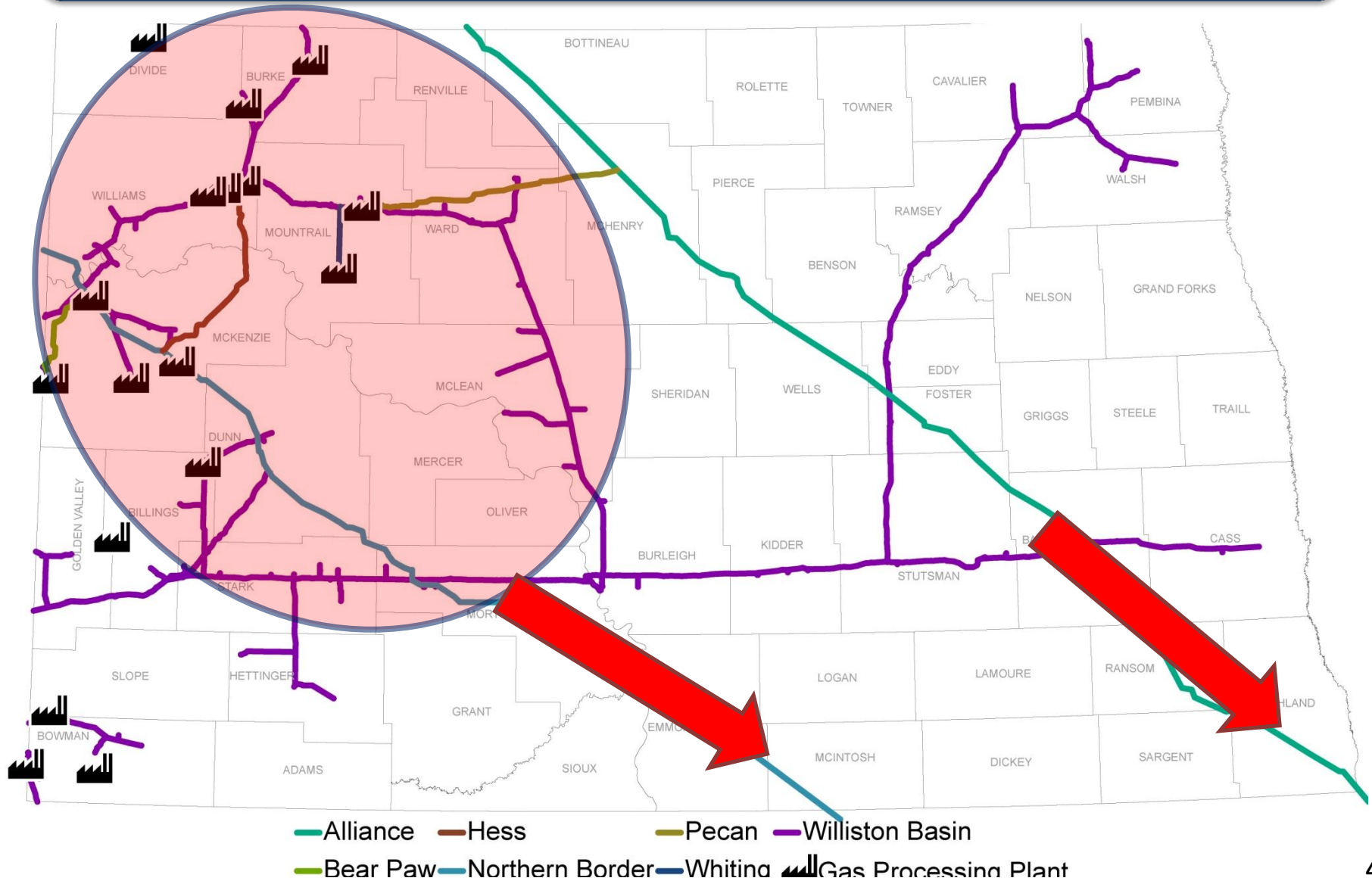
North Dakota Gas Processing and Transportation July, 2011



North Dakota Natural Gas Processing and Gathering



Natural Gas Challenge II



NDPA Webinars

- Past Slides and Video Available Online

- Industry Experts

- New Topics Each Month

- Audience Interaction



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Website:

www.pipeline.nd.gov



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