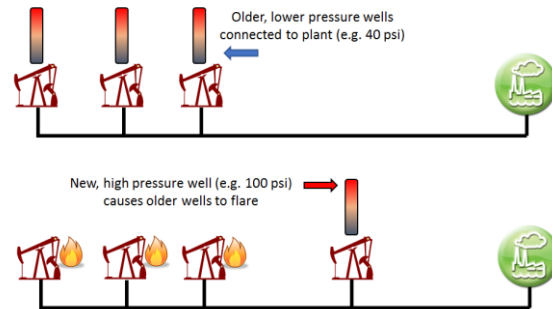
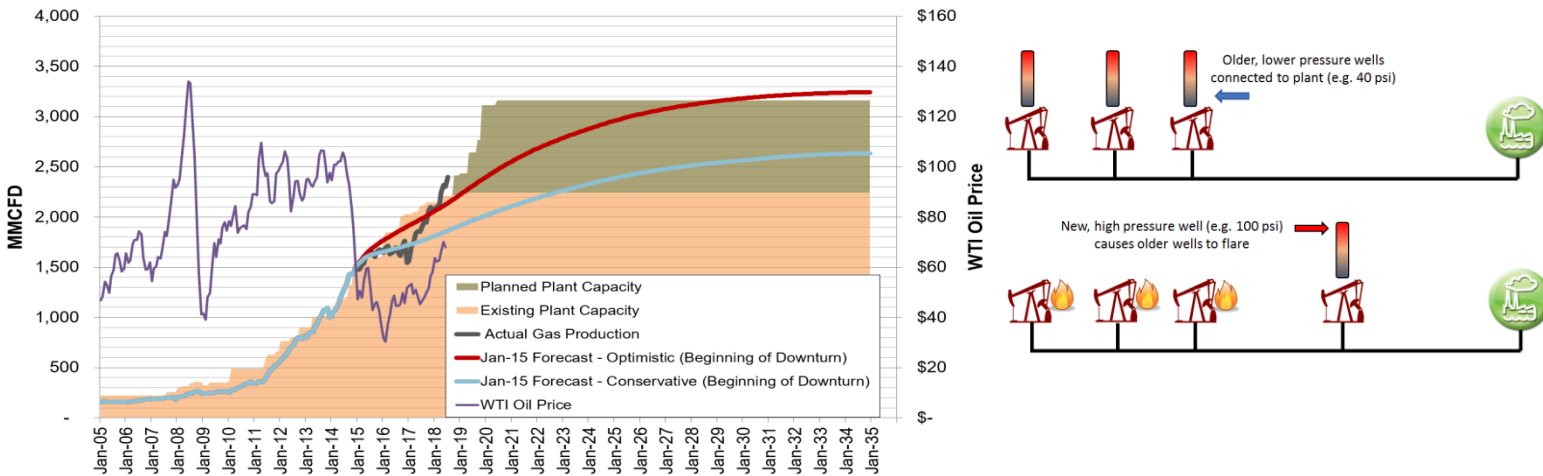


NORTH DAKOTA DEPARTMENT OF MINERAL RESOURCES: OIL & GAS UPDATE

2015 NDPA Outlook vs Actual



Background:

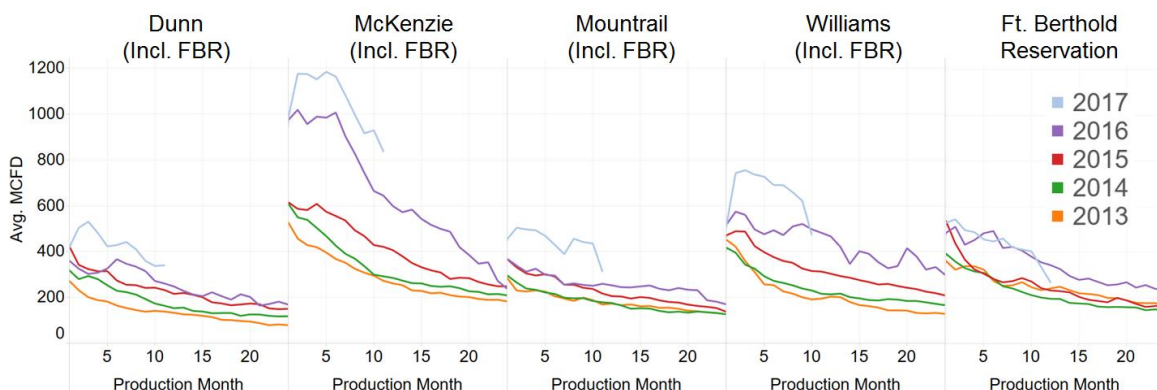
- From 2014-2017 midstream built out 1 BCFD of processing capacity following the high case projections.
- Actual gas production followed 2015 low case scenario until 2017.
- Technological innovations resulted in well performance that exceed the high case scenario 2017 and ongoing.

Ongoing Issues:

Seeing increased frequency of new high-producing wells and historically compliant wells in non-compliance due to their location on the same gathering system. Intensifying the issue includes:

- Advancements in technology: Underestimating well performance;
- Government Process: Federal right-of-way delays; and
- Location of wells: Problem occurring across western ND however increasing most in non-core areas & on Fort Berthold Reservation.

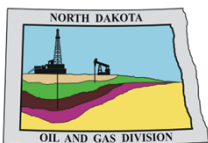
Bakken and Three Forks Well Performance



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Source of Graphs:
 North Dakota Pipeline Authority



North Dakota Monthly Gas Captured

