



# **NORTH DAKOTA OIL REFINING STUDY**

Presented by: Dennis Hill

**ND4RECs**

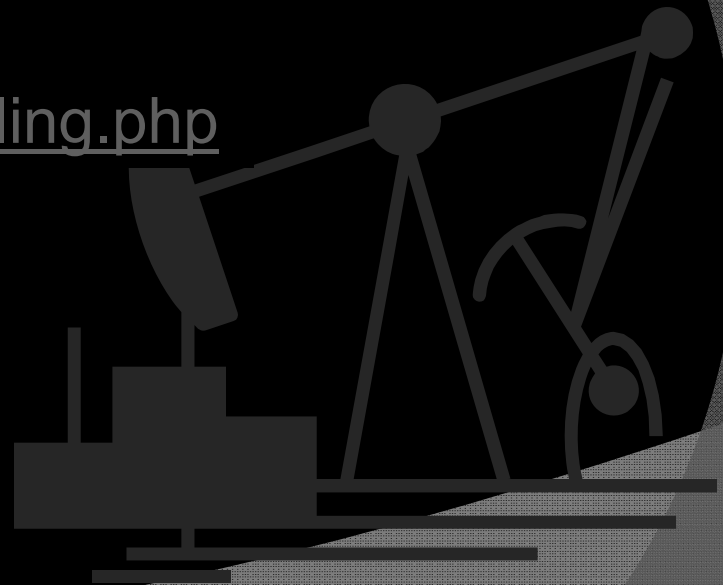
 Touchstone Energy Cooperatives of North Dakota

# **“Is it feasible to increase refining capacity in North Dakota?”**



# Video of horizontal shale drilling

<http://www.northernoil.com/drilling.php>



# Project concerns

- Credibility
- Acceptability
- Duplication of efforts





# Steering Committee Members

**Co-chairs:** Rep. Kenton Onstad (D) - District 4  
Sen. Rich Wardner (R) - District 37

**Refiners:** Ron Day, Tesoro  
John Traeger, Cenex

**Pipeline:** Mike McCann, Tesoro Pipeline  
(John Traeger, Cenex)



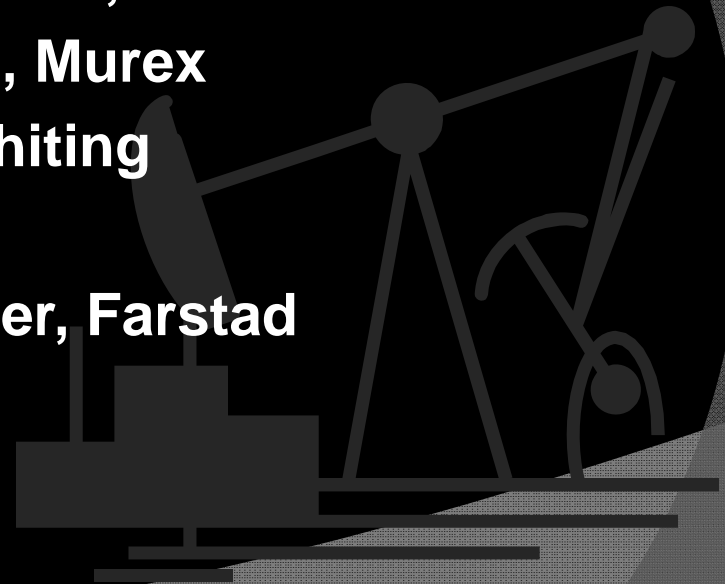
# Steering Committee Members

**Oil Producers:**

- Brad Aman, Continental
- Terry Kovacevich, Marathon
- John Paganis, Murex
- Rick Ross, Whiting

**Distribution:**

- Dennis Krueger, Farstad



# Steering Committee Members

**Emerging Interest:** Mel Falcon, Northwest Refining  
(Refining/Investors)

**Spokesperson:** Dennis Hill, NDAREC



## Advisory Committee Members

- Gaylon Baker, Stark County Development
  - Lori Capouch, NDAREC
  - Pat Downs, NDAREC
  - Mike Fladeland, ND Department of Commerce
  - Robert Harms, Northern Alliance of Independent Producers
  - Rep. Pat Hatlestad, (R)-District 1
  - Lee Kaldor, Deputy State Director, Sen. Dorgan's Office
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## **Advisory Committee Members**

- ◉ Rep. Shirley Meyer, (D)-District 36
- ◉ Dr. Frank Mosley, Minot State University
- ◉ Ron Ness, President, ND Petroleum Council
- ◉ Tom Rolfstad, City of Williston, Economic Development
- ◉ Mike Rud, ND Petroleum Marketers Association
- ◉ John Skurupey, McKenzie Electric Cooperative
- ◉ Gene Veeder, McKenzie County Jobs Development Authority
- ◉ Mark Watne, ND Farmers Union

# Consulting group

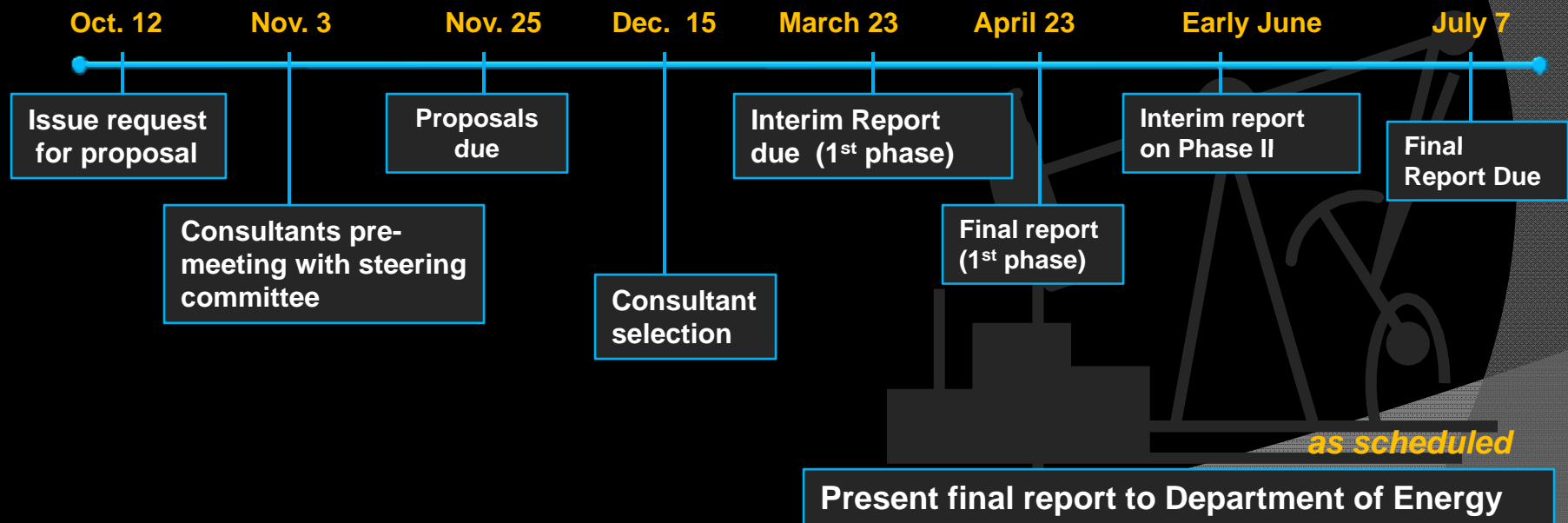


# Project Structure

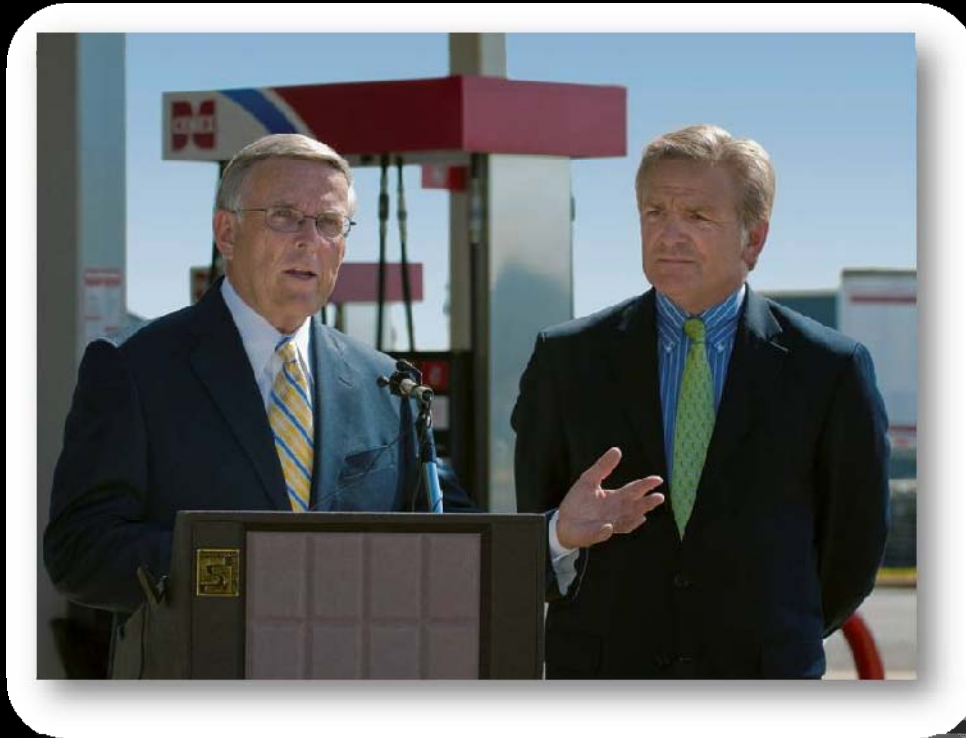
- Two phases:
  - Phase I – Market Assessment
  - Phase II – An economic and refining analysis, refinery plot plan and a compilation of the benefits to the state of North Dakota.

# Refining Capacity Study Timeline...

October 2009– July 2010



# Communications . . .



Press conference in November announcing study



**Questions?**

