



page 4 ANS production up year-over-year;
4 Cook Inlet up, but down from 2019

Dueling factors drive volatility; Zeta, COVID-19 roil oil prices

Countervailing forces launched oil traders on a white-knuckle roller coaster ride to begin the week of Oct. 26.

Hurricane Zeta gained strength as it swept into the Gulf of Mexico, shutting in production while the Organization of the Petroleum Exporting Countries contemplated vacating a production increase planned for year end.

Those bullish developments were muted as a new storm of COVID-19 infections brewed in the United State and Europe, the U.S. presidential elections neared and Libyan oil production rocketed to 500,000 barrels per day as a truce quelled fighting within its borders.

With forward visibility up in the air, the storm of uncertainty gripped financial markets as well, as major stock indexes joined oil prices in a capitulation to the downside Oct. 28.

West Texas Intermediate and Brent crude prices fell by more than 5%, while the Dow Jones Industrial Average, NASDAQ and the S&P 500 closed down by more than 3%.

Gold and Silver were no safe haven, with gold falling 1.44% and silver down 3.92% in the wake of a stronger U.S. dollar index at mid-week. A strong dollar can put downward

see **OIL PRICES** page 11

Canada chases 'scale,' evidenced by blockbuster Cenovus-Husky deal

For the past five years, the Canadian oil patch has been braced for a tsunami of takeovers.

For the past five months, that tension has built to breaking point as COVID-19 has taken hold.

For the past week, as the industry has come to terms with the sound of the first domino to fall, following Husky Energy's acceptance of a takeover offer valued at C\$23.6 billion from Cenovus Energy, attention has quickly shifted to those who are next in line.

Topping the list of targets is a rapidly fading list of foreign-based companies who are expected to follow Equinor, Devon Energy, Royal Dutch Shell, Total and ConocoPhillips who have either headed out the exit door, or are busy packing their bags.

Shell's dwindling assets in Canada include its 10% stake in the Athabasca oil sands project all that is left after unloading most of its project share to Canadian Natural Resources, CNRL, three years ago. The company has also put its Ontario refinery on the block, joining the For Sale signs pinned on most

see **OIL PATCH TAKEOVERS** page 10

State, BLM lease sales, both online, will be held in January

Annual State of Alaska and federal Bureau of Land Management oil and gas lease sales, typically held late in the year, have been rolled to January.

The state's offerings include three areawide sales — the Beaufort Sea, North Slope and North Slope Foothills; BLM's sale is for portions of the National Petroleum Reserve-Alaska.

The Alaska Division of Oil and Gas revised its regulations last year, among other updates adding a provision allowing online bidding for oil and gas lease sales.

This spring, faced with social distancing requirements due to COVID-19, the division was already positioned for online bidding, which was how the areawide Alaska Peninsula and Cook Inlet sales were held.

The division said when it public noticed those spring sales

see **LEASE SALES** page 9



TOM STOKES

EXPLORATION & PRODUCTION

Willow ROD signed

ConocoPhillips reviewing ROD; decision to move into FEED later this year

By KRISTEN NELSON

Petroleum News

The U.S. Department of the Interior signed the record of decision Oct. 26 on the final environmental impact statement for ConocoPhillips Alaska's Willow master development plan.

ConocoPhillips requested preparation of a Willow master development plan in May 2018. Interior's Bureau of Land Management published a notice of intent to prepare an EIS in the Federal Register in August 2018 and a final EIS was released this August.

Willow, a discovery the company made in 2016 at its Bear Tooth unit in the National Petroleum Reserve-Alaska, is the farthest west of

Willow has projected production of 160,000 barrels per day and a processing capacity of 200,000 bpd, BLM said, with production over a 30-year life estimated to total some 586 million barrels of oil.

ConocoPhillips' North Slope developments, west of the company's producing units at Greater Mooses Tooth in NPR-A and the Colville River on state acreage.

Willow has projected production of 160,000 barrels per day and a processing capacity of 200,000 bpd, BLM said, with production over a

see **WILLOW DECISION** page 10

EXPLORATION & PRODUCTION

KIC ANWR seismic

Winter 2020-2021 plan eyes Dec. 31 mob., 848 sq. mi. in eastern 1002 area

By STEVE SUTHERLIN

Petroleum News

The Kaktovik Iñupiat Corp. has requested authorization for a 3D seismic acquisition program on the eastern portion of the Arctic National Wildlife Refuge Coastal Plain for the winter season of 2020-21.

A proposal and plan of operations for the survey, dubbed the Marsh Creek East Program, was released Oct. 23 by the U.S. Department of the Interior's Bureau of Land Management.

The program area encompasses some 848 square miles, 542,592 acres in total, including 92,000 acres of KIC lands with Arctic Slope Regional Corp. subsurface ownership and 450,592 acres managed by BLM, the proposal said.

This winter's program is smaller than the Marsh Creek 3D survey, earlier proposed by partners SAExploration, ASRC and KIC, which was to encompass the entire 2,600 square miles of the ANWR 1002 area.

This winter's program is smaller than the Marsh Creek 3D survey earlier proposed by partners SAExploration, ASRC and KIC, which was to encompass the entire 2,600 square miles of the ANWR 1002 area.

Approval would authorize KIC and operator SAE to conduct operations once frost and snow

see **ANWR SEISMIC** page 12

GOVERNMENT

Jade advances Sourdough

Independent on track to drill BP's 1990s eastern North Slope oil discovery

By KAY CASHMAN

Petroleum News

Alaska independent Jade Energy LLC is moving steadily forward with its plans to evaluate and possibly develop BP's Sourdough oil discovery, having completed its scheduled summer work and obtained several federal and state permits and authorizations.

"Despite the COVID-19 situation and challenges imposed by a less than robust commercial environment in the Alaska oil industry we are largely on schedule with plans outlined in the 2nd Jade POD," or Plan of Development, Erik Opstad told Petroleum News Oct. 27.



ERIK OPSTAD

Opstad, who oversees Jade's operations in Alaska and is a 50% owner, is a state of Alaska certified professional geologist who has worked the North Slope for 35 years, including a stint with BP in various roles and as a principal and general manager of Savant Alaska. He currently heads up operating subsidiaries of 88 Energy in Alaska.

A couple of days after it was filed on March 17, the Alaska Department of Natural Resource's Division of Oil and Gas approved Jade's second POD for the undeveloped Sourdough prospect on the southeastern edge of the Point Thomson unit, or PTU. The first new

see **SOURDOUGH** page 8

● EXPLORATION & PRODUCTION

BLM & ConocoPhillips respond to appeal

Nuiqsut and five environmental groups had elevated challenge over 2018-2019 NPR-A exploration program to 9th Circuit court

By **ALAN BAILEY**

For *Petroleum News*

The Bureau of Land Management and ConocoPhillips have filed briefs in the U.S. Court of Appeals for the 9th Circuit in an appeal by the village of Nuiqsut and five environmental organizations against BLM's approval of ConocoPhillips' 2018-19 National Petroleum Reserve-Alaska exploration program. The exploration in question involved the drilling of up to six exploration wells in or near the Bear Tooth unit, together with the construction of ice roads, ice pads, an airstrip and temporary accommodation.

Environmental assessment challenged

The plaintiffs argue that BLM should have prepared an environmental impact statement for the exploration activities, rather than relying on simply conducting an environmental assessment. BLM says that its environmental assessment linked back to the environmental impact statement for the NPR-A integrated activity plan, completed in 2012. That EIS fully considered the types of activity that ConocoPhillips conducted in its 2018-19 exploration, BLM says. The environmental assessment

was also tiered back to the EIS for ConocoPhillips' nearby Greater Mooses Tooth 1 development and the supplementary EIS for Greater Mooses Tooth 2, the agency says.

Both BLM and ConocoPhillips also argue that the appeal is now moot, given that the exploration in question has already been carried out. Operations approved by BLM were completed on April 28, 2019.

"What remains is undisturbed tundra, appearing as it did before the winter program with the exception of a few small surface well caps," ConocoPhillips wrote in its court brief.

Rejected by district court

The appeal was originally launched in March 2019 in the federal District Court in Alaska, with the court granting a ConocoPhillips motion to intervene in the case.

On Jan. 9, 2020, District Court Judge Sharon Gleason rejected the appeal, upholding the BLM environmental assessment for the exploration program. The plaintiffs subsequently elevated their case to the 9th Circuit Court — hence the new briefings in the case.

The District Court order rejecting the appeal did comment on the impact of the nearby oil and gas industry on

the traditional way of life in Nuiqsut, the North Slope community that is closest to areas of petroleum development. ConocoPhillips' 2018-19 exploration activities took place in the general vicinity of the village, the court said. The plaintiffs claimed that BLM's assessment of the potential impacts of the exploration violated the National Environmental Policy Act and the Administrative Procedures Act by failing to take into account impacts on the Teshekpuk caribou herd and subsistence activity. The plaintiffs also claimed that BLM's decision violated the Alaska National Interest Lands Conservation Act, known as ANILCA, because the agency had not adequately considered alternative actions that could reduce or eliminate impacts on subsistence use of the land.

However, the court found that BLM had acted in compliance with NEPA, APA and ANILCA.

Referenced 2012 EIS

In its recent 9th Circuit filing BLM repeats its assertion that, by referring back to the 2012 EIS for the NPR-A integrated activity plan, it had complied with NEPA in

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Alaska-Mackenzie Rig Report

Rig Owner/Rig Type	Rig No.	Rig Location/Activity	Operator or Status
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Alaska Rig Status

North Slope - Onshore

Doyon Drilling			
Dreco 1250 UE	14 (SCR/TD)	Milne Point, L-63	Hilcorp Alaska LLC
Dreco 1000 UE	16 (SCR/TD)	Standby	
Dreco D2000 Uebd	19 (SCR/TD)	Standby	
AC Mobile	25	Standby	
OIME 2000	141 (SCR/TD)	Standby	
	142 (SCR/TD)	Standby	
TSM 700	Arctic Fox #1	Standby	

Hilcorp Alaska LLC			
Rotary Drilling	Innovation	Milne Point, I Pad	Hilcorp Alaska LLC

Kuukpik Drilling	5	Deadhorse	Available
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Nabors Alaska Drilling			
AC Coil Hybrid	CDR-2 (CTD)	Deadhorse, Cold Stacked at Nabors Deadhorse Yard	BP
AC Coil	CDR-3 (CTD)	Kuparuk, Cold Stacked at 12 Acre Pad	ConocoPhillips
Ideco 900	3 (SCR/TD)	Deadhorse, Stacked	Available
Dreco 1000 UE	7-ES (SCR-TD)	Kuparuk, Cold Stacked	Oil Search
Mid-Continental U36A	3-S	Stacked	Available
Oilwell 700 E	4-ES (SCR)	Stacked	Available
Dreco 1000 UE	9-ES (SCR/TD)	Stacked	ConocoPhillips
Oilwell 2000 Hercules	14-E (SCR)	Deadhorse	Available
Oilwell 2000 Hercules	16-E (SCR/TD)	Stacked	Brooks Range Petroleum
Oilwell 2000 Canrig 1050E	27-E (SCR-TD)	Stacked	Glacier Oil & Gas
Oilwell 2000	33-E	Deadhorse	Available
Academy AC Electric CANRIG	99AC (AC-TD)	Stacked	Repsol
OIME 2000	245-E (SCR-ACTD)	12 Acre Pad, stacked	ENI
Academy AC electric CANRIG	105AC (AC-TD)	Stacked	Oil Search
Academy AC electric Heli-Rig	106AC (AC-TD)	Stacked	Great Bear Petroleum

Nordic Calista Services			
Superior 700 UE	1 (SCR/CTD)	Deadhorse	Available
Superior 700 UE	2 (SCR/CTD)	Deadhorse, stacked	Available
Ideco 900	3 (SCR/TD)	Deadhorse, Stacked	Available
Rig Master 1500AC	4 (AC/TD)	Oliktok Point	ENI

Parker Drilling Arctic Operating LLC			
NOV ADS-10SD	272	Deadhorse, Stacked	Available
NOV ADS-10SD	273	Deadhorse, Stacked	Available

North Slope - Offshore

BP			
Top Drive, supersized	Liberty rig	Inactive	BP

Doyon Drilling			
Sky top Brewster NE-12	15 (SCR/TD)	Standby	

Nabors Alaska Drilling			
OIME 1000	19AC (AC-TD)	Oooguruk, Stacked	ENI

Cook Inlet Basin – Onshore

BlueCrest Alaska Operating LLC			
Land Rig	BlueCrest Rig #1	Stacked	BlueCrest Alaska Operating LLC

Glacier Oil & Gas	Rig 37	West McArthur River Unit Workover	Glacier Oil & Gas
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All American Oilfield LLC			
IDECO H-37	AAO 111	Stacked in the Peak yard	Available

Hilcorp Alaska LLC			
TSM-850	147	Stacked	Hilcorp Alaska LLC
TSM-850	169	Beluga River Unit	Hilcorp Alaska LLC

Cook Inlet Basin – Offshore

Hilcorp Alaska LLC			
National 110	C (TD)	Platform C, Stacked	Hilcorp Alaska LLC
	Rig 51	Steelhead Platform, Stacked	Hilcorp Alaska LLC
	Rig 56	Monopod A-13, stacked	Hilcorp Alaska LLC

Nordic Calista Services			
Land Rig	36 (TD)	Kenai, stacked	Available

Spartan Drilling			
Baker Marine ILC-Skidoff, jack-up		Spartan 151, stacked at Rig Tenders where pre mobilization work is being performed	Hilcorp Alaska LLC

Furie Operating Alaska			
Randolf Yost jack-up		Nikiski, OSK dock	Available

Glacier Oil & Gas			
National 1320	35	Osprey Platform, activated	Glacier Oil & Gas

Mackenzie Rig Status

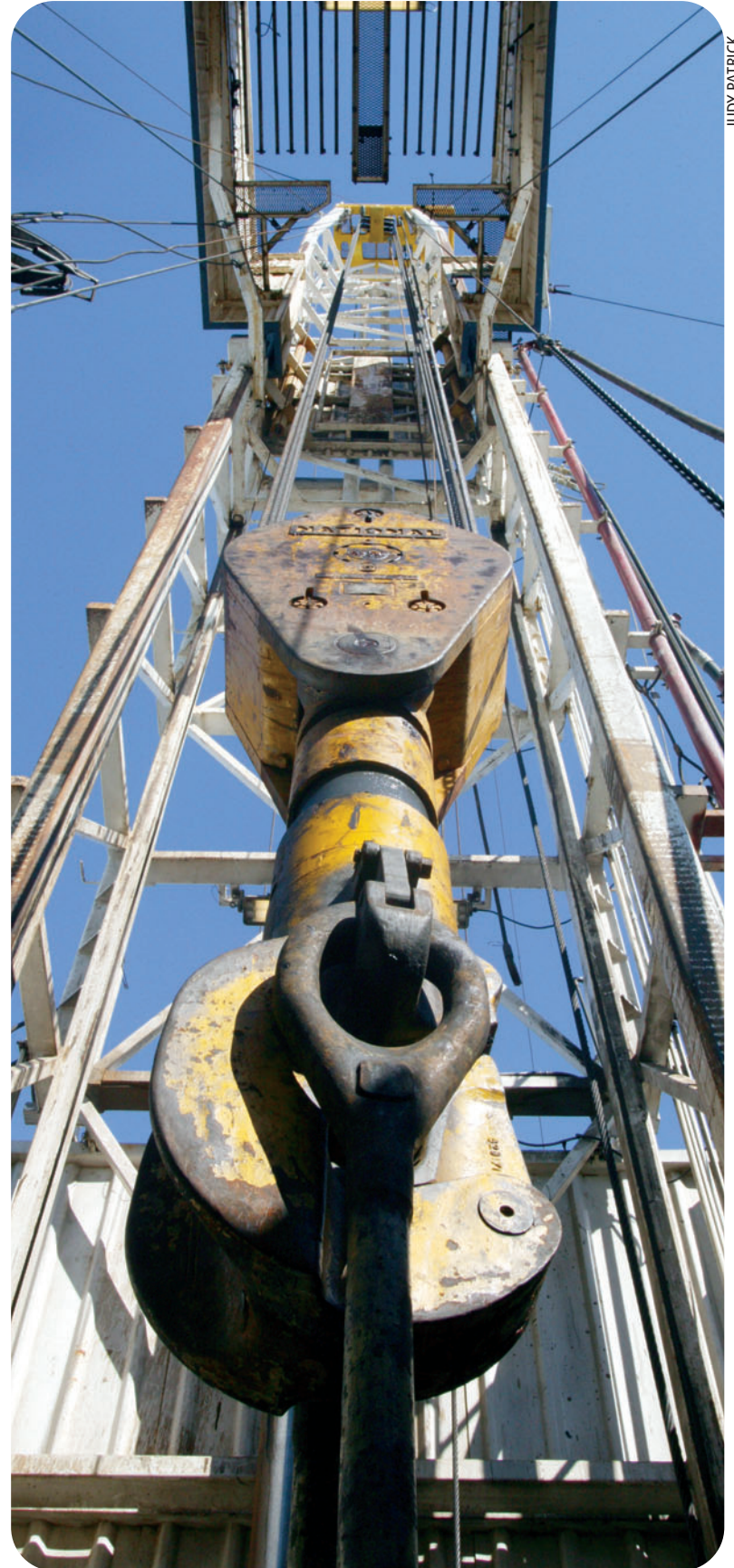
Canadian Beaufort Sea

SDC Drilling Inc.			
SSDC CANMAR Island Rig #2	SDC	Set down at Roland Bay	Available

The Alaska-Mackenzie Rig Report as of October 28, 2020.
Active drilling companies only listed.

TD = rigs equipped with top drive units WO = workover operations
CT = coiled tubing operation SCR = electric rig

This rig report was prepared by Marti Reeve



JUDY PATRICK

Baker Hughes North America rotary rig counts*

	Oct. 23	Oct. 16	Year Ago
United States	287	282	830
Canada	83	80	147
Gulf of Mexico	13	14	20

Highest/Lowest

US/Highest	4530	December 1981
US/Lowest	244	August 2020

*Issued by Baker Hughes since 1944

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EXPLORATION & PRODUCTION

September ANS production up marginally

Crude, NGLs at 482,194 bpd, up 0.7% from August, up 1.4% from 2019; Cook Inlet at 11,483 bpd, up 3% from August, down 15% from 2019

By **KRISTEN NELSON**

Petroleum News

Alaska North Slope crude oil and natural gas liquids production averaged 482,194 barrels per day in September, up 0.7%, 3,554 bpd, from an August average of 478,640, and up 1.4% from a September 2019 average of 475,648 bpd.

In both cases the increases came from Prudhoe Bay, the Slope's largest field, and from NGL production — reflecting the increasingly gassy nature of ANS production. NGLs averaged 51,942 bpd in September, up 12.4%, 5,739 bpd, from an August average of 46,204 bpd and up 30.6% from a September 2019 average of 39,770 bpd.

ANS crude averaged 430,251 bpd in September, down 0.5%, 2,185 bpd, from an August average of 432,436 bpd, and down 1.3% from a September 2019 average of 435,878 bpd.

In September 2019, crude accounted for 90.7% of ANS production with NGLs accounting for 9.3%; this September, crude accounted for 89.2%, and NGLs 10.8%.

Three North Slope fields produce NGLs: Endicott, Northstar and Prudhoe Bay, with Prudhoe accounting for the majority of ANS NGLs, 47,461 bpd in September — 18.3% of Prudhoe production, compared to 17.6% a year ago.

Production data reported here are from the Alaska Oil and Gas Conservation Commission, which provides volumes by field and well on a month delay basis.

Prudhoe up 7%

The largest month-over-month per-barrel increase was at the Hilcorp North Slope-operated Prudhoe Bay field, which averaged 259,693 bpd in September, up 7%, 17,005 bpd, combined crude and NGLs, from an August average of 242,688 bpd, and up 16.5% from a September 2019 average

of 222,911 bpd.

Crude oil at Prudhoe averaged 212,232 bpd in September, up 5.6%, 11,289 bpd, from an August average of 200,944 bpd and up 14.6% from a September 2019 average of 185,163 bpd, accounting for 81.7% of Prudhoe production, compared to 82.45% a year ago. NGL production averaged 47,461 bpd in September, up 13.7%, 5,717 bpd, from an August average of 41,744 bpd and up 25.7% from a September 2019 average of 37,749. NGLs accounted for 18.3% of Prudhoe production this September, compared to 17.55% a year ago.

In addition to the primary reservoir, production volumes from Prudhoe include Aurora, Borealis, Lisburne, Midnight Sun, Niakuk, Polaris, Point McIntyre, Put River, Raven and Schrader Bluff.

Eni's Oooguruk field also had a month-over-month increase in production. *see ANS PRODUCTION page 5*

Cook Inlet gas production up 12%

Natural gas production in Cook Inlet averaged 222,532 thousand cubic feet per day in September, up 11.9%, 3,648 mcf, from an August average of 218,883 mcf, and up 3.6% from a September 2019 average of 214,904 mcf per day.

This data is from the Alaska Oil and Gas Conservation Commission, which reports production on a month-delay basis. For natural gas AOGCC reports measurements in thousands of cubic feet, mcf.

Eight large gas fields accounted for 86.7% of Cook Inlet production 192,852 mcf per day in September.

Hilcorp Alaska's Kenai gas field averaged 39,845 mcf per day in September, 17.9% of inlet production, up 4.6%, 1,765 mcf, from an August average of 38,079 mcf, and up 29.9% from a September 2019 average of 30,667 mcf per day.

Hilcorp's McArthur River, the inlet's largest oil producer, averaged 29,458 mcf per day of natural gas in September, up 14%, 3,612 mcf, from an August average of 25,846 mcf and up 36.3% from a September 2019 average of 21,615 mcf per day.

Hilcorp's Ninilchik field averaged 29,241 mcf per day in September, down 8.3%, 2,639 mcf, from an August average of 31,879 mcf and down 19.3% from a September 2019 average of 36,225 mcf per day.

Hilcorp's Swanson River averaged 23,585 mcf per day in September, up 1.1%, 251 mcf, from an August average of 23,334 mcf but down 34.3% from a September 2019 average of 35,908 mcf per day.

The Hilcorp-operated Beluga River field averaged 21,713 mcf per day in September, down 1%, 227 mcf, from an August average of 21,940 mcf, and down 0.1% from a September 2019 average of 21,734 mcf per day.

Hilcorp's North Cook Inlet field averaged 17,891 mcf per day in September, down 0.5%, 86 mcf, from an August average of 17,976 mcf, but up 29.9% from a September 2019 average of 13,769 mcf per day.

Hilcorp's Beaver Creek field averaged 16,370 mcf per day in September, up 31.9%, 3,957 mcf, from an August average of 12,413 mcf, and up 124.2% from a September 2019 average of 7,302 mcf per day.

HEX's Kitchen Lights averaged 14,749 mcf per day in September, up 6.1%, 841 mcf, from an August average of 13,098 mcf, but down 9.7% from a September 2019 average of 16,327 mcf per day.

Smaller inlet gas fields

Fourteen smaller fields account for the remaining 13.3% of Cook Inlet natural gas production.

Hilcorp's Cannery Loop field averaged 4,823 mcf per day in September, down 7.8%, 407 mcf, from an August average of 5,230 mcf, and down 5.2% from a September 2019 average of 5,088 mcf per day.

AIX's Kenai Loop field averaged 4,604 mcf per day in September, down 9.5%, 483 mcf, from an August average of 5,087 mcf and down 6.2% from a September 2019 average of 4,911 mcf per day.

Hilcorp's Granite Point averaged 3,661 mcf per day in September, up 1.6%, 56 mcf, from an August average of 3,605 mcf and up 34.8% from a September 2019 average of 2,717 mcf per day.

Hilcorp's Deep Creek averaged 3,455 mcf per day in September, down 9.8%, 376 mcf, from an August average of 3,831 mcf and down 23.8% from a September 2019 average of 4,535 mcf per day.

Cook Inlet Energy's North Fork averaged 3,296 mcf per day in September, down 1.3%, 45 mcf, from an August average of 3,341 mcf and down 12.8% from a September 2019 average of 3,778 mcf per day. CIE is a Glacier Oil and Gas company.

BlueCrest's Hansen field averaged 3,052 mcf per day in September, down 10.8%, 371 mcf, from an August average of 3,423 mcf and down 44.9% from a September 2019 average of 5,538 mcf per day.

Hilcorp's Trading Bay averaged 2,456 mcf per day in September, down 17.6%, 525 mcf, from an August average of 2,981 mcf and down 7.4% from a September 2019 average of 2,652 mcf per day.

Hilcorp's Ivan River averaged 2,396 mcf per day in September, down 39.4%, 1,555 mcf, from an August average of 3,950 mcf, but up 491.6% from a September

see COOK INLET GAS page 7

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ANS PRODUCTION

increase, averaging 7,631 bpd in September, up 9.7%, 677 bpd, from an August average of 6,954 bpd but down 18.6% from a September 2019 average of 9,379 bpd.

Milne down marginally

Production from other North Slope fields was down from August to September, with the smallest month-over-month decline at Hilcorp Alaska's Milne Point field, which averaged 33,038 bpd in September, down 0.1%, 31 bpd, from an August average of 33,069, but up 5.9% from a September 2019 average of 31,192 bpd.

Hilcorp Alaska's Northstar averaged 8,996 bpd in September, down 1.32%, 120 bpd, from an August average of 9,116 bpd and down 0.4% from a September 2019 average of 9,035 bpd.

Crude oil production at Northstar averaged 5,554 bpd in September, 61.7% of the field's production, down 1.67%, 94 bpd, from an August average of 5,648 bpd and down 25.5% from a September 2019 average of 7,452 bpd when crude accounted for 82.5% of production. NGL production at Northstar averaged 3,442 bpd in September, 38.3% of the field's production, down 0.8%, 26 bpd, from an August average of 3,468 bpd, but up 117.4% from a September 2019 average of 1,583 bpd, when NGLs accounted for just 17.5% of the field's production.

Endicott, also operated by Hilcorp Alaska, averaged 7,006 bpd in September, down 1.9%, 138 bpd, from an August average of 7,144 bpd, but up 47.8% from a September 2019 average of 4,742 bpd. Crude production at Endicott averaged 5,967 bpd in September, down 3%, 185 bpd, from an August average of 6,153, but up 38.7% from a September 2019 average of 4,304 bpd. Crude represented 85.2% of Endicott production in September, compared to 90.8% last September. Endicott NLG production averaged 1,039 bpd in September, 14.8% of the field's production, up 4.8%, 48 bpd, from an August average of 991 bpd and up 137.2% from a September 2019 average of 438 bpd when NGLs represented just 9.2% of the field's production.

The Kuparuk River unit, the Slope's second largest, operated by ConocoPhillips Alaska, averaged 98,719 bpd in September, down 0.3%, 253 bpd, from an August average of 98,973 bpd and down 10% from a September 2019 average of 109,628 bpd.

In addition to the main Kuparuk pool, Kuparuk produces from satellites at Meltwater, Tabasco and Tarn, and from West Sak.

Eni's Nikaitchuq averaged 16,304 bpd in September, down 4.1%, 691 bpd, from an August average of 16,995 and down 21.1% from a September 2019 average of 20,652.

Point Thomson, operated by ExxonMobil Production, averaged 7,505 bpd in September, down 8.6%, 708 bpd, from an August average of 8,213 bpd, but up 49% from a September 2019 average of 5,038 bpd.

ConocoPhillips' Greater Mooses Tooth in the National Petroleum Reserve-Alaska averaged 1,828 bpd in September, down 31.3%, 832 bpd, from an August average of 2,660 bpd and down 75% from a September 2019 average of 7,316 bpd.

ConocoPhillips' Colville River averaged 41,473 bpd in September, down 11,355 bpd, 21.5%, from an August average of 52,827 bpd, and down 23.6% from a September 2019 average of 54,271 bpd.

In addition to oil from the main Alpine pool, Colville production includes satellite production from Fiord, Nanuq and Qannik.

Cook Inlet up 3%

Crude oil production from Cook Inlet averaged 11,483 bpd in September, up 3%,

255 bpd, from an August average of 11,144 bpd but down 15% from a September 2019 average of 13,514 bpd.

Hilcorp's Beaver Creek averaged 183 bpd in September, up 18.8%, 29 bpd, from an August average of 154 bpd but down 18.3% from a September 2019 average of 224 bpd.

Hilcorp's Granite Point averaged 3,005 bpd in September, up 2.1%, 61 bpd, from an August average of 2,944 bpd and up 32.3% from a September 2019 average of 2,271 bpd.

BlueCrest's Hansen field, the Cosmopolitan prospect, averaged 1,045 bpd in September, up 2.3%, 23 bpd, from an August average of 1,022 bpd but down 17.1% from a September 2019 average of 1,261 bpd.

Hilcorp's McArthur River, Cook Inlet's largest field, averaged 3,933 bpd in September, up 3.9%, 146 bpd, from an August average of 3,787 bpd but down 9% from a September 2019 average of 4,321 bpd.

Hilcorp's Middle Ground Shoal averaged 1,161 bpd, down 0.7%, 101 bpd, from an August average of 1,153 bpd, and down 14.5% from a September 2019 average of 1,358 bpd.

Hilcorp's Swanson River averaged 833 bpd in September, up 7.8%, 60 bpd, from an August average of 773 bpd but down 0.6% from a September 2019 average of 838 bpd.

Hilcorp's Trading Bay averaged 1,323 bpd in September, up 0.9%, 37 bpd, from an August average of 1,311 bpd and up 2.1% from a September 2019 average of 1,296 bpd.

ANS crude oil production peaked in 1988 at 2.1 million bpd; Cook Inlet crude oil production peaked in 1970 at more than 227,000 bpd. ●

Contact Kristen Nelson
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EXPLORATION & PRODUCTION

US rotary rig count increases by 5 to 287

The Baker Hughes U.S. rotary rig count was at 287 for the week ending Oct. 23, up by five from 282 the previous week, continuing an increase that began in mid-August. The count is still down substantially from a year ago, by 543 from 830.

When the count hit 244 the week of Aug. 14, it was not just the low for 2020, but the lowest it has been since the Houston based oilfield services company began issuing a weekly U.S. rig count in 1944.

Prior to this year, the low was 404 rigs in May 2016. The count peaked at 4,530 in 1981.

At the beginning of the year the count was in the low 790s, where it remained through mid-March, when it began to fall, dropping below what had been the historic low in early May with a count of 374 and continuing to drop through the third week of August when it gained back 10 rigs.

This week's count includes 211 rigs targeting oil, up six from the previous week and down 485 from a year ago, 73 rigs targeting gas, down one from the previous week and down 60 from a year ago and three miscellaneous rigs, unchanged from the previous week and up two from a year ago.

Twenty-one of the holes were directional, 245 were horizontal and 21 were vertical.

Alaska count up by one

The rig count for Texas (125), which has the most active rigs in the country, was up by two from the previous week, but down 293 from a year ago.

Alaska (3) and Oklahoma (15) were each up by one rig from the previous week. Louisiana (37) was down by one rig.

Rig counts were unchanged in the remaining states: California (4), Colorado (4), New Mexico (45), North Dakota (11), Ohio (6), Pennsylvania (18), Utah (3), West Virginia (8) and Wyoming (3).

Baker Hughes shows Alaska with three active rigs Oct. 23, up by one from the previous week and down by five from a year ago.

The rig count in the Permian, the most active basin in the country, was up by three from the previous week at 133, but down 284 from a count of 417 a year ago.

—KRISTEN NELSON

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• THE PRODUCERS MAGAZINE PREVIEW

Exxon takes two paths at Pt. Thomson

Longtime Alaska player pursuing AGDC, Qilak LNG projects; remaining gas injection components from manufacturer coming this year

By ERIC LIDJI

For Petroleum News

For the past 43 years, the Point Thomson unit has been widely viewed as one of the saviors of the North Slope basin: a major field with resources that could help the State of Alaska shift from an oil-based economy to an industrial economy based on natural gas.

But to date, the story of the unit has been one of future promise.

Its first 35 years were consumed by inactivity and then by regulatory and legal debates between the State of Alaska and operator ExxonMobil Alaska Production Inc. Then came four years of construction, eventually leading to sustained production in early 2016.

Even with that milestone, Point Thomson is far from its full potential — an opinion held by ExxonMobil, the State of Alaska, nearby leaseholders, and the oil patch generally.

The Point Thomson unit is currently producing between 9,000 and 9,500 barrels per day of condensate.

That is a shortcoming by two important measurements. First, it is below the 10,000 barrel per day minimum required by a settlement agreement with the state.

Second, condensate is not the ultimate goal of the unit. Point Thomson contains 8 trillion cubic feet of natural gas — a quarter of the known, recoverable resources on the North Slope. Those resources are currently constrained by the lack of a viable route to market.

The current Point Thomson Initial Production System produces natural gas entrained with condensate from the PTU-17 well. The natural gas is removed from the stream and injected back into the field using the PTU-15 and PTU-16 wells. The condensate is shipped through the Point Thomson Export Pipeline to the trans-Alaska oil pipeline. The system is designed to cycle as much as 200 million cubic feet of natural gas per day.

The unit produced 5,200 barrels per day during the 18 months ending July 31, 2019 — an average taken from various high and low swings. The unit hit a peak of 10,700 barrels per day in December 2018, exceeding the minimum rate required by the settlement.

During the same period, the unit produced 95.9 million cubic feet of natural gas per day, cycling 93 million back into the field. (The remaining 2.9 million cubic feet was used as field gas to support operations at the unit.) As with condensate production, average daily natural gas production peaked in December 2018, with 199.4 million cubic feet per day.

At issue are the extreme pressures found at the field. According to Exxon, the gas injection equipment has struggled in recent years, leading the company to work with its manufacturer on improvements. The first of those new components was installed in July 2019. The company said that it expected the remaining components to arrive this year.



DARLENE GATES

Next steps

The 2012 settlement proposed three possible paths for Point Thomson after the start-up of the Initial Production System. ExxonMobil could either sanction a major gas sale by 2016, expand liquids production to 30,000 barrels per day by 2019, or integrate Point Thomson into the Prudhoe Bay unit by shipping gas supplies to improve oil recovery.

To date, none of those have occurred.

ExxonMobil insists that a major gas sale is the best of all possible options. Its most recent plan of development touts various efforts toward that goal in recent years. Even so, those efforts have not been enough to justify the sanctioning of the multibillion-dollar project.

A 2017 settlement allowed ExxonMobil to expand condensate production or to integrate the unit with Prudhoe Bay. ExxonMobil preferred the latter option but was delayed by the need for reaching a commercial agreement with the owners of the Prudhoe Bay unit.

In a September 2018 agreement, Alaska Department of Natural Resources Commissioner Andy Mack deferred the 2019 deadline for expanding liquids production while ExxonMobil was advancing the Alaska LNG project to bring gas to market. Whenever the project reaches a final investment decision or the state determines that the project has stalled, the Point Thomson owners will have 30 months to advance or will lose acreage.

ExxonMobil is involved in two possible projects to bring North Slope gas to market. The first is the Alaska LNG project being overseen by the Alaska Gasline Development Corp.

Under its previous plan of development, covering 2018 and 2019, ExxonMobil worked with the public corporation on financial and technical matters related to the project.

Alaska LNG received a final environmental impact statement from the Federation Energy Regulatory Commission in March 2020, a milestone years in the works. The Alaska Gasline Development Corp. later received a final order from federal regulators.

The Alaska Gasline Development Corp. is now looking for a private sponsor who could take over the \$38.7 billion project to build a large diameter pipeline through the state to

At issue are the extreme pressures found at the field. According to Exxon, the gas injection equipment has struggled in recent years, leading the company to work with its manufacturer on improvements. The first of those new components was installed in July 2019. The company said that it expected the remaining components to arrive this year.

a new liquefaction facility in Nikiski. The goal is to step back sometime later this year.

ExxonMobil is also pursuing a second possibility for marketing Point Thomson supplies.

In October 2019, the company signed an agreement with Qilak LNG Inc. to supply at least 560 million cubic feet per day of natural gas to a newly proposed LNG project.

The gas supplies from Point Thomson would be used for Phase 1 of the Qilak LNG 1 Project, a proposed \$5 billion nearshore liquefied natural gas facility that the Alaska subsidiary of Lloyds Energy of Dubai wants to build near Flaxman Island. Qilak LNG is looking to ship between 4 million and 6 million tons of LNG per year to customers in the Indo-Pacific region as soon as 2025 or 2026, using a fleet of icebreaking LNG tankers.

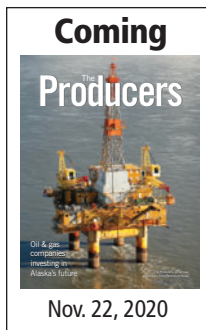
The full vision for the project would require additional producers. “The agreement at the moment is exclusively with Exxon; once we’re able to talk to Hilcorp, once they take over the BP interests, then we hope to have enough gas to increase that to at least 6 million tons,” Qilak President and COO David Clarke told Petroleum News at the time.

Hilcorp later closed on its acquisition of the remaining BP Exploration (Alaska) Inc. holdings on the North Slope, assuming 32% interest in the Point Thomson unit.

Qilak is now conducting an extensive feasibility study including preliminary permitting work this year with the goal of reaching a final investment decision sometime in 2021.

The Qilak project is smaller and cheaper than the state-backed Alaska LNG project. The advantage, according to Qilak, is cost. According to its figures, the Alaska LNG Project would cost some \$2,150 per ton of LNG while the Qilak project would cost about \$1,250 per ton of LNG. Given that the distance to Tokyo is roughly the same for both projects, the cost of Alaska-based infrastructure is a major factor for determining LNG prices. ●

Editor’s note: See this story in The Producers magazine, being released in the Nov. 22, 2020 edition of Petroleum News.



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• PIPELINES & DOWNSTREAM

Keystone XL getting edgy ahead of election

Despite warnings from Democratic campaign officials, it's unclear Biden would halt Keystone XL; Kenney counting on moderation

By **GARY PARK**

For Petroleum News

If Joe Biden wins the White House you may hear an inward sucking sound north of the 49th parallel in Alberta and Saskatchewan.

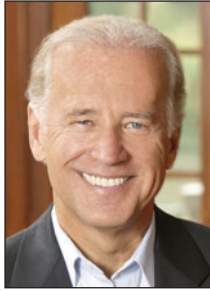
That will reflect the state of high anxiety among a majority of residents in those two Canadian provinces as they face a threat issued earlier this year by Biden campaign officials that a new president would move swiftly to cancel permits allowing TC Energy to complete work on its US\$11.5 billion Keystone XL pipeline.

KXL, as it's better known, is designed to carry 830,000 barrels per day of oil sands bitumen over 2,690 miles from northern Alberta to Steele City, Nebraska, with the option of continuing to Houston and Port Arthur refineries on the Texas Gulf Coast.

The project has been in the works for 12 years and has been the source of costly legal and regulatory squabbles, culminating in a showdown when U.S. President Barack Obama ordered a halt to KXL, ignoring pleas from the Canadian and Alberta governments, followed by



JASON KENNEY



JOE BIDEN

President Donald Trump's removal of Obama's roadblock.

Original in business for 10 years

The original Keystone pipeline has for the past 10 years been delivering up to 590,000 bpd of the same crude bitumen as that planned for KXL to U.S. Midwest refineries. TC Energy plans to add 50,000 bpd to the system next year after signing new 20-year contracts with shippers.

It was built at a cost of US\$7 billion and initially escaped the attention of fossil fuel opponents until environmentally minded supporters of Obama seized their opportunity to win over a president who

see **KEYSTONE ANXIETY** page 9

continued from page 4

COOK INLET GAS

2019 average of 405 mcf per day.

Hilcorp's Lewis River averaged 1,066 mcf per day in September, down 0.3%, 3 mcf, from an August average of 1,069 mcf, but up 145.9% from a September 2019 average of 434 mcf per day.

Hilcorp's Nikolaevsk averaged 372 mcf per day in September, down 4.5%, 17 mcf, from an August average of 389 mcf, and down 23.5% from a September 2019 average of 486 mcf per day.

Amaroq's Nicolai Creek averaged 266

mcf per day in September, down 33%, 131 mcf, from an August average of 397 mcf, but up 15.9% from a September 2019 average of 229 mcf per day.

Hilcorp's Middle Ground Shoal averaged 233 mcf per day in September, up 13.6%, 28 mcf, from an August average of 205 mcf and up 4.2% from a September 2019 average of 223 mcf per day.

Cook Inlet natural gas production peaked in the mid-1990s at more than 850,000 mcf per day.

—KRISTEN NELSON

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APPEAL RESPONSE

its approval of ConocoPhillips' exploration plan. Moreover, BLM had issued a separate evaluation of the impacts on subsistence uses and needs under the terms of ANILCA, the agency said.

One of the issues relating to the case concerns whether, although the exploration activities in question have already been conducted, the court findings in this case could become a precedent for challenges for planned future exploration. However, in its new brief, BLM argues that any future exploration proposal would involve different "areas, scopes and issues," and would, therefore, require its own project-specific NEPA analysis. Moreover, BLM issued a new NPR-A integrated activity plan and an associated EIS in June 2020 — any future environmental assessment for NPR-A exploration activities would need to be tiered to that 2020 EIS, and not the EIS completed in 2012, the agency commented. In addition, an EIS issued in 2020 for ConocoPhillips' nearby planned Willow development analyzes development

activities in the same area as most of the 2018-19 exploration.

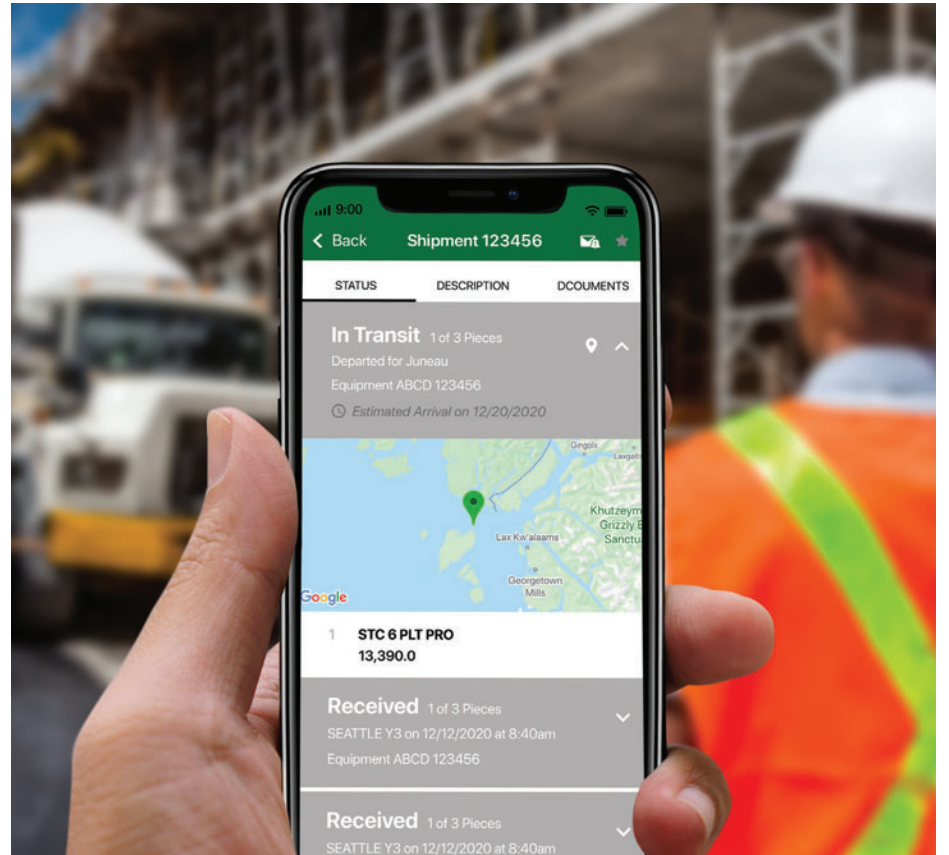
"In short, it is no longer conceivable for BLM to issue a similar EA in the future," BLM's court brief says.

ANILCA compliance

In terms of ANILCA compliance, BLM had determined that the planned exploration activities would not significantly restrict subsistence use of the land, and had also found that there were no alternative lands appropriate for the exploration project's purposes, the brief says. And, while BLM may impose reasonable conditions for the protection of surface resources, ConocoPhillips' NPR-A leases grant the company the right to extract oil and gas within the leasehold, subject to those reasonable conditions, the brief says.

In its new court brief, ConocoPhillips argues that the 2018-19 exploration program at issue was not expected to and did not have any discernible impacts on caribou. ●

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GLACIER BREWHOUSE

continued from page 1

SOURDOUGH

well is scheduled to be drilled in the winter of 2021-22.

Adjacent to ANWR 1002 area

The Sourdough prospect runs along the western edge of the 1002 area of the Arctic National Wildlife Refuge, which is a 1.57 million-acre strip of coastline that was set aside because of its petroleum potential by Congress in 1980 when the 19 million-acre wildlife refuge was created.

Jade is both the majority owner and operator of PTU Tract 32 in Area F of state lease ADL 343112.

Tract 32 holds two of the mid-1990's oil discovery wells, Sourdough 2 and 3. In 1997 BP estimated the prospect held 100 million barrels of recoverable oil.

Jade worked closely on the second POD with the division in order to come up with a plan that maintained the economic viability of the project, which is the farthest east of all North Slope developments.

"The next Plan of Development is due December 31st, but I'll file the draft with the Division November 1st. We're also focused on getting the Plan of Operations filed before year end and we expect a 5-year permit for dredging to be issued by the US Army Corps of Engineers any day now," Opstad said in an Oct. 27 email to PN.

More well locations

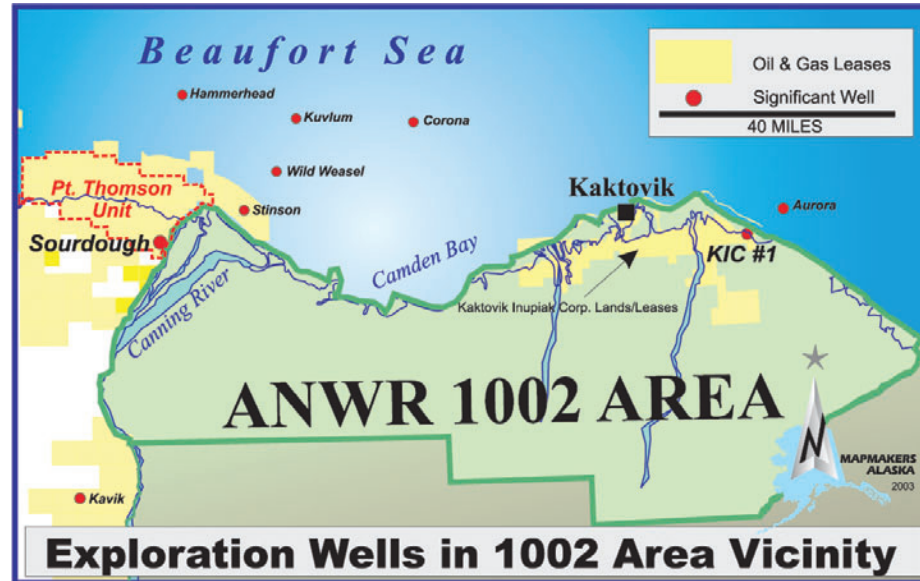
Area F of the PTU was created by the terms of the Point Thomson Unit Settlement Agreement between unit operator ExxonMobil and the other owners. Area F consists of 7,647 non-adjacent acres in the northeastern and southeastern corners of the PTU.

Jade became majority owner and operator of PTU Tract 32, ADL 343112, in the southeastern portion of Area F, by agreement with ExxonMobil Alaska Production Inc. in mid-2018.

Some of the work in the second POD was to focus on selecting additional delineation and development well locations particularly in any "expansion" areas that may be added to ADL 343112 resources through negotiations with the other PTU working interest owners.

Various 3D seismic surveys have been acquired and interpreted over Area F.

One of these was new compressive sensing imaging, or CSI, seismic 3D data from



This map was created for Petroleum News by Mapmakers Alaska in 2003.

the area during the 2017-18 winter season with parameters optimized to characterize Brookian strata. The CSI 3D survey was the first of three field studies.

"On the basis of CSI 3D seismic data we have evaluated a location for Jade 2 sited considerably to the west of Jade 1 and adjacent to the PTU airport to prove up additional resources in ADL 343112," Opstad said Oct. 27.

"We also have focused on working up additional delineation/development well locations in 'expansion' areas that may be added to ADL 343112 resources. Although ongoing conversation with other PTU working interest owners aimed at capitalizing on such opportunities are being pursued, I really don't expect that we can advance those discussions until sometime after the November election results are posted," he said.

Nordic Rig-3

Jade's plans to mobilize a drilling rig to Point Thomson by barge from the Deadhorse area presents a "unique opportunity to capture significant savings versus what would typically be spent on a traditional ice road focused rig mobilization scenario," the company said in its second POD.

"Capturing such savings is key to the economic viability of the project. However, given seasonality drivers, many important tasks are limited to being executed only during very specific calendar windows; barging requires open water, ice road construction requires -20°F temperatures and getting men and equipment to the Jade 1 drillsite requires both conditions,"

per the second POD.

When asked which rig Jade was considering using, on Oct. 27 Opstad said, "We have been very pleased with the performance and safety record of Nordic Calista personnel and equipment on several recent drilling projects and we certainly hope to be able to deploy Nordic Rig 3 to drill Jade 1."

Through Nov. 1

Opstad provided PN with the following "permits, authorizations and completed investigations advanced Jan. 1 through Nov. 1 of this year."

1. U.S. Fish and Wildlife Service Letters of Authorization; LOA 20-INT-08 issued for the incidental take of polar bears during winter operations and LOA 20-INT-06 for the intentional take of polar bears during fall barging operations. Both valid Sept. 1, 2020 through Aug. 5, 2021.
2. ADN/OHA-SHPO State Cultural Resource Investigation Permit (SCRIP) for historic, prehistoric, and archaeological investigations (surveys) on state lands issued on Sept. 8.
3. Request for POD Submittal Extension; Point Thomson Area-F ADL 343112, approved Sept. 17.
4. Jade Energy Oil Discharge Prevention & Contingency Plan; Alaska Department of Environmental Conservation Plan #19-CP-5253, approved July 15.
5. Certificate of Reasonable Assurance; ADEC for placement of dredged and/or fill material in waters of the U.S., issued Sept. 11.
6. Public notice of application for permit; US Army Corps of Engineers #POA-

"On the basis of CSI 3D seismic data we have evaluated a location for Jade 2 sited considerably to the west of Jade 1 and adjacent to the PTU airport to prove up additional resources in ADL 343112," Opstad said Oct. 27.

2020-00347, Aug. 7.

7. Jade 1 Ice Road and Ice Pad Cultural and Archaeological Resources Survey; field survey completed on Aug. 26 by Chuck Mobley and Associates (CMMA). Report submitted to ADN/OHA-SHPO on Oct. 23.

8. Second Bathymetric Survey of the PTU Service Pier Approach; first helicopter based offshore bathymetric survey conducted in Alaska, Aug. 26.

Delineated by 5 wells

Potential Brookian reservoirs have been encountered by numerous wells that have been drilled in and near the Point Thomson unit since the 1970s. Sourdough 2 was drilled to a true vertical depth of 12,562 feet and was plugged and abandoned. Sourdough 3 was drilled to 12,425 feet TVD and suspended. Both wells were granted extended confidentiality by the Alaska Oil and Gas Conservation Commission, or AOGCC.

But a total of five wells were of particular importance, Jade told the division.

The other three wells were in the northeast corner of the unit and were summarized by Jade as follows:

- Alaska State A-1 on ADL 047556 was drilled by Exxon and reached a 14,206-foot TVD in September 1975 and was plugged and abandoned. That data is available to the public from AOGCC.
- Alaska State A-2 is immediately adjacent to Alaska State A-1 and was drilled as a cutting's disposal well by Exxon in 1995 to 2,364-foot TVD and was plugged and abandoned in March 2002.
- Exxon spud Alaska State G-2 from ADL 343110 and directionally drilled the well north to reach a bottom-hole at 14,340-foot TVD within ADL 343109 in August 1983. The well was subsequently plugged and abandoned, but AOGCC granted the well extended confidentiality. ●

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LEASE SALES

that it had contracted with EnergyNet Services LLC to provide an online bidding system.

Rolled to January

Alaska Division of Oil and Gas Director Tom Stokes told PN in an Oct. 26 email that the division would again be working with EnergyNet to offer oil and gas acreage through online bidding.

“This sale will be the first to feature Northern Alaska areawides through this platform,” Stokes said.

Jan. 13 is the anticipated sale date, allowing “for more

time to improve data availability and GIS shapefiles for bidders who may be new to Alaska.”

Stokes said public notice of the sale is anticipated by Nov. 20.

The Bureau of Land Management is also moving its NPR-A sale. In recent years, the state and BLM have coordinated their sale dates, with the state opening bids in the morning and BLM in the afternoon.

In recent years, however, BLM has opened bids online.

“There are many elements associated with scheduling and holding a lease sale to support developing America’s energy resources responsibly, and timing is one of them,” Lesli Ellis-Wouters, communications director for BLM Alaska, said in an Oct. 26 email.

“Interest in leasing and development within the NPR-A remains generally strong. Of note in 2019, BLM Alaska had one of its most successful NPR-A lease sales in recent years, generating \$11,268,709.

She said BLM does follow a procedural timeline in scheduling its sales but said “the time of year is a matter of agency discretion and has varied from year to year.” While the agency strives for a consistent time, “that is one consideration among many.”

She said she anticipates a record of decision on the next NPR-A sale by the end of the year.

—KRISTEN NELSON

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continued from page 7

KEYSTONE ANXIETY

was looking to demonstrate his commitment to tackle climate change.

Although Biden has yet to declare outright his intention to revoke the KXL permits, he partly showed his hand five months ago — at the same time the U.S. Supreme Court ordered a halt to all KXL work until a circuit court and the Supreme Court deliver their final rulings — by calling the “tar sands a very high pollutant.”

But exactly where he stands on KXL adds to confusion he has spread over his intentions for hydraulic fracking.

In the last 15 months he has presented a series of fracking options, from “making sure it is eliminated,” to insisting no fracking would be permitted on federal lands only — uncertainty that has troubled an estimated 21 states which use fracking to develop their oil and natural, notably Pennsylvania.

Backlash following debate

Since the second Biden-Trump debate there has been a backlash in Pennsylvania, Ohio, Oklahoma and New Mexico against any bans they say could cripple their resource industries.

In a move to clarify his position, Biden said on Oct. 24 there would be “no ban on fracking in Pennsylvania,

or anywhere else.”

Especially for Alberta, KXL is a vital underpinning of the province’s belief that it can still grow its oil production, heavily weighted to the oil sands, to 5 million bpd from the current 3 million bpd by 2030.

In a recent research note, Goldman Sachs said the lack of cross-border pipeline capacity poses a long-term challenge for getting Canadian production to market, although it did not rule out greater use of rail and barges.

James Rajotte, Alberta’s envoy in Washington, D.C., is reported to be lobbying hard in Congressional circles, selling lawmakers on an industry commitment to achieve net-zero carbon emissions by 2050 and negotiations to obtain an ownership stake in KXL for Indigenous communities.

Looking for moderation

Clinging to every shred of hope, the Alberta and Saskatchewan governments believe Biden might live up to his reputation for moderation and openness to negotiation, but that doesn’t make much allowance for those who would help shape his strategy on climate change.

Oil sands leaders base a key element of their case on estimates that the oil sands generate only 0.15% of global greenhouse gas emissions.

“We are working with many people in the United States who support (KXL), including many people in the Democratic Party,” Alberta Premier Jason Kenney told reporters.

“We’re in constant contact with American senators

and congressmen on both sides of the aisle, as well as governors and state legislators.”

Kenney said a number of U.S. trade unions and Indigenous groups in the U.S. and Canada are ready to speak in favor of KXL if there is a change in the U.S. administration.

“It would send a very, very negative message should a future U.S. administration cancel a project that’s partly owned by the Canadian government,” he said. “It would undermine the single most important trade relationship that the United States has in the world.

“The U.S. refineries on the Gulf Coast require huge amounts of heavy crude and, if it’s not coming from Alberta, then it’s coming from the socialist dictatorship and OPEC country of Venezuela.”

Kenney said that whoever is elected in the U.S. “we’ll be making these points as strongly as we possibly can.”

Ted Morton, a former energy and finance minister in Alberta, said a veto of KXL “would be another body blow to investor confidence in Western Canada.”

Saskatchewan Premier Scott Moe said he has made a case for KXL with U.S. governors along the KXL route and he expects Prime Minister Justin Trudeau to join that effort if Biden wins.

He said Trudeau should be an aggressive advocate for the Western Canadian energy industry and “more specifically the workers in that industry.” ●

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WILLOW DECISION

30-year life estimated to total some 586 million barrels of oil.

In an Oct. 27 email ConocoPhillips Alaska spokeswoman Natalie Lowman said the company was pleased the record of decision has been issued and is reviewing it.

“The ROD is the key milestone that allows us to move forward with project planning,” she said.

“A decision on moving into FEED (Front End Engineering and Design) will be made later this year, but project construction could begin in 2021 subject to receiving regulatory approvals,” Lowman said.

ConocoPhillips said in July that it expected a final investment decision this year and first oil in 2025-26.

Two drill sites deferred

The Bureau of Land Management said in a press release that the ROD deferred a decision on portions of the proposal, including drill sites Bear Tooth 4 and Bear Tooth 5 and gravel roads and pipelines associated with those drill sites.

BLM said the deferral, requested by ConocoPhillips Aug. 20, does not alter the current proposal.

The Bear Tooth drill sites run roughly

north to south, with Bear Tooth 1 about in the middle. Bear Tooth drill site 4 is the farthest north of the Willow drill sites and Bear Tooth drill site 5 the farthest south.

BLM said the two drill sites and the road and pipeline segments which would connect them to Bear Tooth drill sites 2 and 3 are being deferred, “to allow the Proponent to undertake additional consultation with stakeholders in the community of Nuiqsut to further address concerns some stakeholders have raised regarding potential impacts to caribou migration and subsistence hunting associated with these portions of the Project, prior to BLM addressing approval of these drill sites in a record of decision.”

BLM said construction was planned to begin in 2021 for the main part of the project, while “construction of drill sites BT4 and BT5 would occur during a later phase of development beginning in 2026.” The agency said construction is expected to take nine years.

“When the Proponent has completed its additional consultation with the community of Nuiqsut and seeks authorization for drill sites BT4 and BT5, this ROD may be amended to address approval of those drill sites,” BLM said.

Access issues

BLM said the Willow project would extend an all-season gravel road from Greater Mooses Tooth southwest with

gravel roads connecting all project gravel infrastructure including the Willow Processing Facility, Willow Operations Center and the drill sites. The project also includes a constructed freshwater reservoir, valve pads, pipeline pads, water source access pads, road turnouts with subsistence access ramps, bridges, horizontal directional drilling pipeline pads at the Colville River and up to three boat ramps for subsistence use.

“The access road alignment would provide direct gravel-road access from the existing gravel road network in the GMT and Alpine developments to the Project facilities,” BLM said. “The all-season gravel road connection to Alpine would allow for additional operational safety and risk reduction by providing redundancies and additional contingencies for each development,” as well as providing support for “reasonably foreseeable future actions,” the agency said.

Roadless alternatives were considered, but BLM said the increase in air traffic with roadless alternatives would be substantial, increasing overall disturbance to caribou in the case of one alternative and requiring an airstrip close to a high-density caribou calving area with the other alternative.

BLM said a diesel pipeline from Kuparuk Central Processing Facility 2 to the Willow Processing Facility was considered, in lieu of trucking diesel from

Alpine, but rejected.

The agency said a diesel pipeline extension to the Willow Processing Facility would add a year to project construction, and the diesel pipeline extension would not be in operation until the end of construction, while the greatest need for diesel would be during construction. After construction, diesel would only be pumped from Alpine to Willow a few days a month, with the pipeline idle the rest of the time, increasing “the potential for sedimentation and corrosion within the pipeline, which increase the risk of a diesel spill from the pipeline.”

In the FEIS, BLM identified ConocoPhillips’ proposal as its preferred alternative.

That included the third sealift module delivery option, which ConocoPhillips proposed following objections to the first two options which required construction of gravel islands. The third option would transport modules for the project via sealift to Oliktok Point, which has an existing dock, and from there by ice road across the Colville River.

That proposal, along with other less substantial changes, was included in a supplemental EIS issued in March of this year.

The ROD confirmed selection of the proponent’s proposal for the project. ●

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OIL PATCH TAKEOVERS

of its refineries around the world, retaining only those it rates as “strategically essential.”

A report by Greg Parady, an analyst at RBC Dominion Securities, said CNRL — already Athabasca’s operator and majority owner — would be the obvious buyer of those assets at a cost of C\$6.3 billion to C\$8.5 billion.

Others on the firing line include Chinese controlled MEG Energy, which spurned a hostile offer from Husky in 2018 for C\$3.3 billion, although MEG’s debt of C\$3 billion remains a stumbling block.

However, the remaining state-owned Chinese players in the oil sands — Sinopec, CNOOC and PetroChina — are expected by analysts and bankers to remain put because their properties match corporate goals of owning reserves with long-life and assured reserves.

Cenovus-Husky deal

The Cenovus-Husky deal includes a purchase price of C\$3.8 billion and the assumption of C\$5.2 billion in long-term debt, with the total merger valued at C\$23.6 billion.

Based on the most recent estimate Cenovus has a payroll of 2,300 and Husky has 5,500 employees, of which an unknown number will be let go once

redundancies and overlaps are determined.

Husky is 70% owned by Hong Kong billionaire Li Ka-Shing, while his family interests push the total over 90%. The transaction is estimated to give Cenovus shareholders 61% of the combined company, leaving Husky shareholders with 39%.

The combined production will be 750,000 barrels of oil equivalent per day (275,000 boe per day from Husky), with upgrading and refining capacity at 660,000 boe per day (250,000 boe per day from Husky). Proved and probable reserves are 9 billion boe; current take-away pipeline capacity is 265,000 barrels per day, while planned expansion is targeted at 305,000 bpd. Crude oil storage capacity is 16 million barrels.

Issue of scale

Cenovus Chief Executive Officer Alex Pourbaix, who will head the new entity, told reporters that “scale is important ... so many people in our industry right now are looking at consolidation, both to cut their costs and improve their balance sheet. So we are going to see more.”

He said the expanded heavy oil portfolio will allow the new company to better ride out commodity price fluctuations.

Rafi Tahmazian, a senior portfolio manager at Canoe Financial, told the Calgary Herald the deal is just the start of the consolidation phase.

“You have to decide if you are going to be one of the consolidators and one of the larger producers that end up in the (Western Canada) basin, or will you end up as prey? Or will you be left behind just blowing in the wind.”

Husky Chief Executive Officer Rob Peabody said that as the Canadian industry has increasing trouble attracting investment “it becomes more and more important that you have a company that actually is relevant to the global investor and to the Canadian investor.”

—GARY PARK

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OIL PRICES

pressure on oil prices as well.

Alaska North Slope crude rose above \$40 per barrel Oct. 27, up 50 cents to \$40.19 — joining WTI Brent, and other major crude benchmarks from around the world in a recovery from recent price weakness.

In Oct. 28 trading however, WTI plunged 5.86% — down \$2.32 to \$37.25, while Brent lost 5.32% — down \$2.19 to \$39.01. ANS closed down 4% Oct. 28, falling \$1.61 to \$38.58.

GOM shut-ins spike

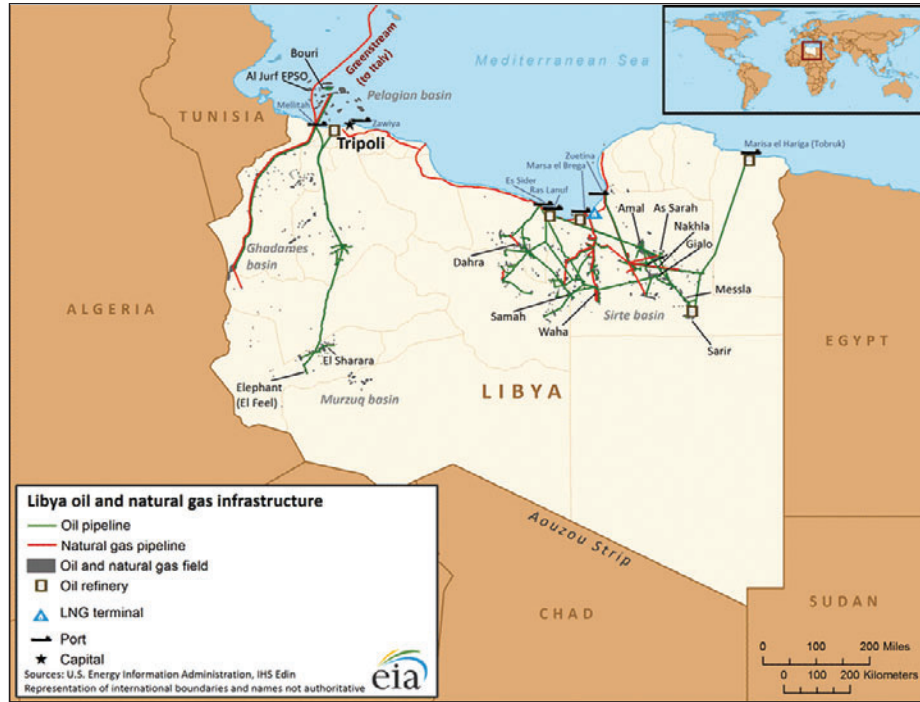
As hurricane-spurred oil facility evacuations in the Gulf of Mexico began Oct. 27, oil prices began to move upward, but the price strength didn't hold, even as shut-ins increased into the next day.

The U.S. Bureau of Safety and Environmental Enforcement estimated that approximately 66.6% of current oil production and 44.5% of natural gas production in the Gulf of Mexico had been shut-in as of the morning of Oct. 28.

Based on operator reports, BSEE estimated that personnel were evacuated from a total of 228 production platforms, 35.5% of the 643 manned platforms in the Gulf.

Six dynamically positioned rigs moved off location out of the hurricane's projected path as a precaution, representing 37.5% of the 16 dynamically positioned rigs currently operating in the Gulf, BSEE said.

After the storm passes, facilities will be inspected, BSEE said, adding that production from undamaged facilities will be brought back online immediately, but facilities sustaining damage may take longer to bring back online.



Alaska North Slope crude rose above \$40 per barrel Oct. 27, up 50 cents to \$40.19 — joining WTI Brent, and other major crude benchmarks from around the world in a recovery from recent price weakness.

Meanwhile OPEC+ continues to consider holding its current production levels into the new year, foregoing a scheduled increase in January.

Renewed coronavirus lockdowns could slow economic recovery and the return of oil demand to pre-pandemic levels, Mohammad Sanusi Barkindo, OPEC Secretary General said in remarks via videoconference to the 14th EU-OPEC Energy Dialogue Oct. 27.

“Consequently, we must remain vigi-

lant, and continue to seek a multilateral approach to addressing this pandemic,” he said.

In a commentary released Oct. 28, OPEC said its four-year-old Declaration of Cooperation with allied producers was instrumental in avoiding a catastrophe when Covid-19 hit.

In April, OPEC said, participants “agreed to the longest and deepest oil production adjustment in history,” at 9.7 million bpd, “five times more than the breakthrough production adjustments reached in December 2016.”

Without those measures, OPEC estimated that oversupply would have added a further 1.3 billion barrels to global crude oil stocks, driving available global crude oil storage capacity to top out in May.

“The medium- and long-term outlook is inexorably linked to current production adjustments,” OPEC said.

On Oct. 23, Libya’s National Oil Corp. lifted force majeure on exports from the Es Sider and Ras Lanuf ports, saying it expected to reach production of 1 million bpd by late November — up from the current 500,000 bpd.

Libya targets 1 million bpd

On Oct. 23, Libya’s National Oil Corp. lifted force majeure on exports from the Es Sider and Ras Lanuf ports, saying it expected to reach production of 1 million bpd by late November — up from the current 500,000 bpd.

The renewed production in the country, which holds the largest reserves in Africa, is dependent on a UN-brokered cease fire that ended its civil war.

Analysts, including the International Energy Agency, previously had predicted Libyan production would rise to 700,000 bpd by year end. However, a senior Libyan official said that the “fragile ceasefire” will only survive if rival foreign countries stop meddling in the conflict, the Financial Times reported Oct. 26.

Fathi Bashagha, interior minister in the UN-backed government in Tripoli, told FT that the biggest challenge would be foreign “interference,” or a lack of international support to help Libyans “implement the ceasefire”.

Even if foreign powers withdraw from Libya, it will face huge challenges after years of chaos and violence, with the country effectively divided between east and west.

—STEVE SUTHERLIN

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ANWR SEISMIC

cover are at sufficient depths to protect tundra — as identified in the 2020 Coastal Plain Leasing Record of Decision — continuing until tundra travel has been closed for the winter, the proposal said.

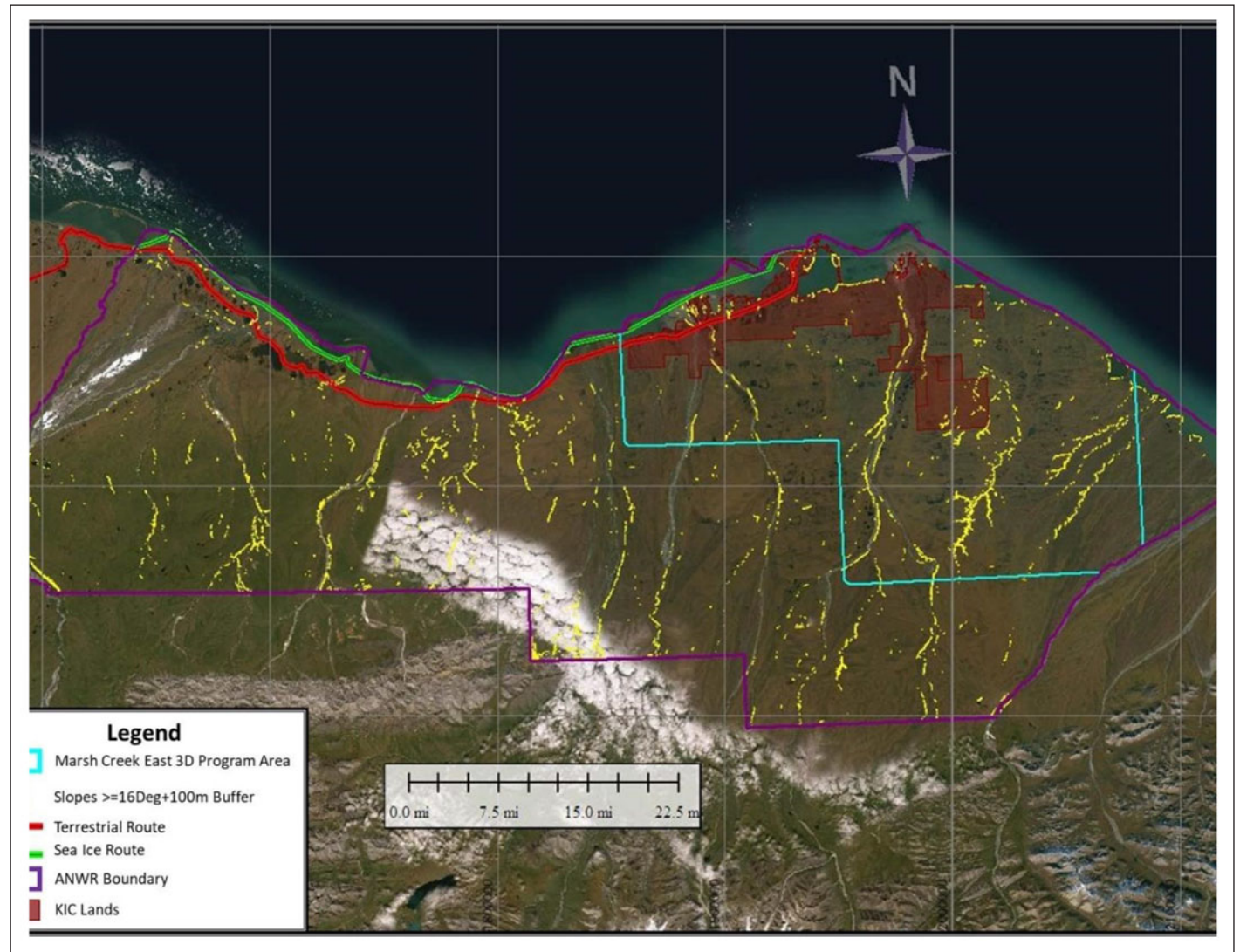
Mobilization is expected to start Dec. 31, after forward looking infrared radar surveys are conducted to detect polar bear den sites. Thermistors in and around Kaktovik will determine snow depth and appropriate soil temperatures prior to start of operations, the proposal said.

Analysis of the project includes access to the program area from Deadhorse, storage of fuel and a mobile camp capable of housing up to 180 people.

Mobilization is expected to start Dec. 31, after forward looking infrared radar surveys are conducted to detect polar bear den sites. Thermistors in and around Kaktovik will determine snow depth and appropriate soil temperatures prior to start of operations, the proposal said.

Camp trailers and seismic equipment would be transported along a preferred overland access route from Deadhorse to Kaktovik or via a secondary sea ice route. The tundra access route is 136.5 miles, versus 66.4 miles for the sea ice route. No ice roads are planned.

Before camp trailers and equipment enter the program area, advance survey teams using Tucker Sno Cats or low ground pressure vehicles would scout



environmental conditions, such as snow depth and ice thickness and integrity, and map a trail for the main seismic crew and camp to follow, the proposal said.

The advance survey crew will verify, identify, stake and map avoidance areas such as environmental hazards, slopes greater than 10 degrees, Native allotments, cultural sites, river and stream

crossings, and important habitat features including (but not limited to) polar bear critical habitat and den sites, seal lairs, grizzly bear den sites and sensitive willow areas.

The advance crew would use Sno Cats and/or snow machines equipped with ground penetrating radar systems to test ice thickness. Ice conditions would be checked with battery operated ice augers to verify the calibration of the GPR, measure ice depths on sea ice, or verify depths where GPR units cannot reach.

Sno Cats on advance ice check operations would be equipped with a handheld or vehicle mounted FLIR device to scan for potential polar bear dens.

Temporary airstrips approximately 75-100 feet wide and 2,300-3,500 feet long would be constructed on tundra and lakes, as necessary, to support seismic activities.

Aircraft would not operate within one half mile of polar bears and would remain 1,500 feet above ground level, except during landing and takeoff, and

when required for safety reasons such as inclement weather, the proposal said, adding that aerial FLIR surveys for maternal polar bear den sites would be conducted below this altitude with U.S. Fish and Wildlife Service approval.

SDS with compressive sensing

Seismic acquisition would be source driven shooting (SDS) combined with a compressive sensing design, using rubber tracked/buggy vibroseis vehicles and wireless autonomous nodes/geophones, the proposal said.

Geophone receiver points with wireless nodes and a single geophone would be spaced along a receiver line perpendicular to source lines; and both source and receiver lines would be spaced approximately 1,320 and 660 feet apart, respectively. Up to five receiver lines could be placed on the ground at one time.

SDS methodology allows for a single vibroseis vehicle to travel down a source line, reducing risk of compaction or damage to the tundra, and 12 vibroseis vehicles, spaced at least 1,320 feet apart, could collect data at the same time.

Lighter, smaller univibe vehicles (also used to conduct vibroseis) would be used in narrow riverbeds and on ungrounded freshwater ice, to reduce potential disturbance and reduce the risk of working in areas of ungrounded freshwater ice.

Univibes would only be used on lakes with ice greater than 36-inches thick. Nodal devices and geophones, however, can be placed on lakes and riverbeds with ice thick enough for Sno Cats.

Univibes could also be used on grounded sea ice.

Two univibe vehicles could collect data at the same time.

Vibroseis sampling frequency along source lines will be 27.5 feet, with duration and decibel levels of the source so low that hearing protection is not required for seismic crew members, the proposal said.

KIC plans approximately 6,459 miles of receiver lines and 3,237 miles of source lines. Receiver lines would be traveled twice — to lay out the receivers, and to retrieve. ●

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