



INDUSTRY & FACILITY REPORT

United States LNG Value Chain

Natural Gas Resources, Production Basins, Pipelines, Liquefaction Facilities and Global Exports

UPSTREAM Shale + associated gas	MIDSTREAM Gathering + processing	PIPELINES Interstate + feed gas	LIQUEFACTION Pretreatment + LNG	EXPORT Storage + marine
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Prepared as a strategic, commercial and engineering overview

Data cut-off: 1 September 2026 | Project status changes rapidly; see classification notes

For detailed project-specific information, technical analysis, and engineering support,
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Executive Summary

The United States is the world's largest LNG exporter and operates a value chain that begins with abundant shale and associated natural gas. Gas moves from wells through gathering, compression and processing systems into interstate and intrastate pipelines, then to Gulf Coast and Atlantic liquefaction terminals. At the terminal it is treated to cryogenic specification, liquefied near -160°C , stored, and loaded onto LNG carriers for global delivery.

In 2025, U.S. LNG exports averaged about 15.0–15.1 Bcf/d and exceeded 100 million tonnes for the first time. Europe received a record 10.3 Bcf/d—about 68% of U.S. LNG exports—while flexible FOB contracts also served Asia, Latin America, the Middle East and other destinations. EIA projected exports above 18.1 Bcf/d in 2027 as new capacity ramps up.

2025–26 indicator	Reported level	Meaning
Dry natural-gas production	Record; 112.33 Bcf/d in June 2026	The production base can support domestic demand and rapidly rising exports, subject to regional constraints.
2025 LNG exports	~15.0–15.1 Bcf/d; ~111 Mt by ship-tracking estimate	United States remained the world's largest exporter.
FERC “existing” export terminals	8 as of 18 Aug 2026	Does not include every small-scale/ISO-container plant or projects exporting during commissioning.
Projects classed under construction by FERC	8 projects / expansions, 24.33 Bcf/d listed	Includes partially commissioned capacity and multi-phase developments.
Gas transmission + gathering mileage	~413,360 miles in 2025	PHMSA-reported onshore/offshore transmission and gathering mileage.

Central conclusion. U.S. LNG is not an isolated terminal business. Its competitiveness depends on basin productivity, processing capacity, pipeline deliverability, Henry Hub and regional basis, liquefaction reliability, shipping and destination prices. The Gulf Coast advantage comes from the combination of low-cost gas, dense infrastructure, deepwater ports and brownfield industrial capability.

1. Scope, Definitions and Status Method

This report covers continental U.S. natural-gas resources and production, gas processing, major trunk and LNG feed-gas pipelines, operating export plants, projects under construction, approved projects not yet under construction, proposed expansions, small-scale export facilities and offshore FLNG. Import-only and peak-shaving plants are outside the main inventory unless relevant to an export conversion.

Status label	Definition used
Existing / operating	FERC lists the terminal as existing, or a small-scale facility has documented exports.
Producing during commissioning	LNG cargoes are being produced/exported, but the full project remains under construction or has not reached commercial operation.
Under construction	FERC or operator reports active construction; may include phases already commissioning.

Status label	Definition used
FID / financed	Sponsors have sanctioned and financed a project; construction status may lag regulatory map updates.
Approved, not under construction	Regulatory authorization exists, but no active major construction is reported.
Proposed / pre-filing / pending	Development remains contingent on permits, contracts, financing and FID.

Capacity warning. Bcf/d, Bcf/year and Mtpa values are not perfectly interchangeable because authorization volumes, nominal train output, peak capacity, feed-gas requirements and LNG product output are different measures. Tables preserve the source convention and use approximate Mtpa only where helpful.

2. The U.S. LNG Value Chain

Stage	Core activities	Principal assets	Commercial driver
Resource development	Leasing, drilling, completion and production	Shale/tight wells, gathering lines, compressors	Wellhead price, productivity, liquids value and takeaway.
Gas processing	Separation, dehydration, acid-gas removal and NGL recovery	Processing plants, fractionation links and residue-gas systems	Pipeline specification and NGL uplift.
Transmission	Aggregate and move residue gas to demand/export hubs	Interstate/intrastate pipelines, compressors and storage	Tariff, basis spread, firm transportation and balancing.
LNG pretreatment	Remove CO ₂ , H ₂ S, water, mercury and heavy hydrocarbons	AGRU, molecular sieves, Hg beds, NGL/heavy-HC removal	Protect cryogenic equipment and meet LNG specification.
Liquefaction	Cool gas to ~-160°C and manage refrigerants	Main cryogenic heat exchangers, turbines/motors and compressors	Liquefaction fee, fuel/power and availability.
Storage and export	Buffer production and load ships	Full-containment tanks, BOG system, loading pumps, jetty	Marine availability, shipping and destination price.

3. Major Natural-Gas Resources and Production Sites

3.1 Resource character

Modern U.S. output is dominated by shale and tight formations developed with horizontal drilling and hydraulic fracturing. Dry-gas plays respond directly to gas prices; associated gas from oil-directed basins can continue growing even when local gas prices are weak. Conventional onshore and offshore production remains important but is no longer the main growth engine.

Basin / play	Primary states	Gas character	LNG relevance
Appalachian: Marcellus and Utica	Pennsylvania, West Virginia, Ohio	Very large dry/wet shale resource; leading producing region	Low-cost supply, but constrained routes to Gulf Coast; serves Northeast/Midwest and can backfill southbound flows.

Basin / play	Primary states	Gas character	LNG relevance
Permian: Delaware and Midland	Texas, New Mexico	Large associated gas with oil; NGL-rich in many areas	Fastest major growth source; connected to South Texas and Louisiana through expanding takeaway.
Haynesville / Bossier	Louisiana, East Texas	Dry, high-pressure shale gas near Gulf Coast	Premium LNG feed source because of proximity and scalable deliverability.
Eagle Ford	South Texas	Associated and wet/dry gas windows	Close to Corpus Christi and Brownsville export corridor.
Gulf Coast conventional / Austin Chalk	Texas, Louisiana	Mixed conventional, tight and associated gas	Local supply and mature pipeline connectivity.
Anadarko / SCOOP–STACK	Oklahoma, Texas Panhandle	Associated and wet gas	Feeds Midcontinent pipelines toward Gulf Coast and Midwest.
Rockies: Piceance, Uinta, Green River	Colorado, Utah, Wyoming	Tight gas and associated gas	Large resource but distant from Gulf terminals; basis and takeaway matter.
San Juan	New Mexico, Colorado	Conventional, tight gas and CBM	Mature western supply; regional and Mexico-oriented flows.
Williston / Bakken	North Dakota, Montana	Associated gas from oil production	Processing growth; distant from LNG coast.
Gulf of Mexico federal offshore	Offshore Louisiana/Texas	Conventional associated and nonassociated gas	Declining share but directly connected to Gulf Coast systems.
Alaska North Slope / Cook Inlet	Alaska	Large stranded North Slope resources; mature Cook Inlet	Basis for proposed Alaska LNG; Kenai has legacy export infrastructure.

3.2 Production level and concentration

EIA reported that U.S. natural-gas production reached a new record in 2025. Permian marketed production averaged 27.7 Bcf/d, up 2.7 Bcf/d or 11%, and represented 23% of U.S. marketed output. Appalachia, Permian and Haynesville each produced more gas than many countries; in the first half of 2025, Permian output was about 25 Bcf/d and Haynesville about 14 Bcf/d. Preliminary dry production reached a record 112.33 Bcf/d in June 2026.

- Texas is the largest producing state and hosts Permian, Eagle Ford and Haynesville supply plus most planned export capacity.
- Pennsylvania is the core Marcellus producer; West Virginia and Ohio add Marcellus/Utica volumes.
- Louisiana combines Haynesville production, Henry Hub, dense processing and pipeline systems, underground storage and major LNG terminals.
- New Mexico is a major growth state because of the Delaware Basin; Oklahoma, Colorado, Wyoming and North Dakota remain important contributors.

4. Gas Gathering, Processing and NGL Integration

Raw gas normally passes through lease separation and gathering compression before entering a processing plant. The plant removes water, CO₂/H₂S where present, and recoverable NGLs. Residue gas then meets

transmission specifications. This upstream processing is not a substitute for LNG-terminal pretreatment: LNG plants impose much tighter water, CO₂, mercury and heavy-hydrocarbon limits to prevent freezing and heat-exchanger blockage.

- Permian and Eagle Ford systems are highly integrated with NGL pipelines and Mont Belvieu fractionation/petrochemical markets.
- Haynesville is primarily dry gas, simplifying liquids handling but requiring high-pressure gathering and compression.
- Appalachian wet-gas areas produce ethane, propane and heavier NGLs; takeaway economics can affect drilling and residue-gas supply.
- Pipeline-quality interchangeability—heating value, nitrogen, CO₂, water and hydrocarbon dew point—must be managed across blended sources.

5. Major Natural-Gas Pipelines

5.1 National trunk systems

Pipeline / system	Primary corridor	Relevance to LNG and national balancing
Transcontinental Gas Pipe Line (Transco)	Texas/Louisiana Gulf Coast ↔ Southeast ↔ Mid-Atlantic/Northeast	Largest interstate corridor; bidirectional expansions connect Gulf supply, Appalachia and eastern markets.
Tennessee Gas Pipeline	Gulf Coast ↔ Northeast	Moves Gulf gas north and Appalachian gas to multiple markets; interconnects Louisiana hub systems.
Texas Eastern Transmission	Gulf Coast ↔ Northeast	Major bidirectional route linking Gulf, Appalachia and eastern demand.
Natural Gas Pipeline Company of America (NGPL)	Permian/Midcontinent/Texas ↔ Midwest/Chicago	Large Permian and Texas connectivity with Gulf and Midwest interconnects.
ANR Pipeline	Gulf Coast ↔ Midwest/Great Lakes	Storage-rich system linking Louisiana production and northern markets.
Columbia Gulf / Columbia Gas	Louisiana Gulf Coast ↔ Appalachia/Mid-Atlantic	Important southbound/northbound integration with Appalachian supply.
Trunkline Gas	Gulf Coast ↔ Midwest	Legacy import path increasingly configured for Gulf Coast supply/LNG flows.
Gulf South Pipeline	Texas/Louisiana/Mississippi/Alabama	Dense Gulf regional network serving industrial load and LNG feed-gas interconnects.
Florida Gas Transmission	Texas/Louisiana ↔ Florida	Primary peninsula supply corridor; relevant to Florida LNG and marine fuel plants.
Northern Natural / Panhandle / Rockies Express	Midcontinent, Rockies and Midwest corridors	National balancing and west-to-east/east-to-west optionality; indirect Gulf supply role.

5.2 LNG-dedicated and Gulf Coast feed-gas systems

Terminal / corridor	Dedicated or key pipeline infrastructure
Sabine Pass	Creole Trail and Sabine Pass LNG pipeline connections; access to multiple Louisiana/Texas systems.
Corpus Christi	Corpus Christi Pipeline with South Texas interconnects; expansion ties to Permian/Eagle Ford markets.
Cameron LNG	Cameron Interstate Pipeline and Gulf regional interconnects.
Freeport LNG	Freeport LNG pipeline and Stratton Ridge-area connections to Texas intrastate systems.
Calcasieu Pass	TransCameron Pipeline connecting to major southwest Louisiana systems.
Plaquemines LNG	Gator Express pipeline system connecting terminal to Louisiana gas network.
Golden Pass	Golden Pass Pipeline with major interstate/intrastate interconnects near Sabine Pass.
Port Arthur LNG	Port Arthur Pipeline Louisiana Connector and Texas Connector projects.
Rio Grande LNG	Rio Bravo Pipeline from Agua Dulce hub to Brownsville.
Woodside Louisiana LNG	Louisiana Connector pipeline concept and multiple Gillis-area interconnections.
CP2 LNG	CP Express pipeline connecting Cameron Parish terminal to southwest Louisiana systems.
Commonwealth LNG	Commonwealth pipeline interconnection near Cameron Parish; integrated upstream supply strategy announced.

PHMSA reported about 413,360 miles of transmission and gathering pipe in 2025, including roughly 300,213 miles of transmission and 113,148 miles of gathering. Local distribution mileage is additional. This enormous network is a competitive advantage, but congestion and basis volatility can still occur at basin exits and Gulf Coast delivery points.

6. Existing and Producing U.S. LNG Export Facilities

6.1 Large marine facilities — FERC existing list

Facility / operator	Location	FERC capacity	Configuration / status
Kenai LNG / Trans-Foreland	Nikiski, Alaska	0.20 Bcf/d	Legacy Cook Inlet facility; operating capability/status and cargo frequency should be checked for current commercial use.
Sabine Pass LNG / Cheniere	Cameron Parish, Louisiana	4.55 Bcf/d	Six large trains; first modern lower-48 export cargo in 2016.
Cove Point LNG / BHE GT&S	Maryland	0.79 Bcf/d	Single liquefaction train added to legacy import terminal; Atlantic access.
Corpus Christi LNG / Cheniere	Corpus Christi, Texas	2.40 Bcf/d	Three original large trains; Stage III midscale trains commissioning separately.
Cameron LNG / Sempra consortium	Hackberry, Louisiana	2.06 Bcf/d	Three large liquefaction trains at converted import terminal.

Facility / operator	Location	FERC capacity	Configuration / status
Elba Liquefaction / Kinder Morgan	Elba Island, Georgia	0.38 Bcf/d	Ten movable modular liquefaction system units; optimization work underway.
Freeport LNG	Freeport, Texas	2.38 Bcf/d	Three electric-drive trains; converted import terminal.
Calcasieu Pass / Venture Global	Cameron Parish, Louisiana	1.76 Bcf/d	Nine modular blocks / 18 trains; commercial operations achieved in 2025.

6.2 Producing/exporting while broader construction continues

Project	Physical operating position at cut-off	Regulatory/construction classification
Plaquemines LNG / Venture Global	Exporting since Dec 2024; substantial 2025 volumes; blocks continued ramp-up/commissioning.	FERC Aug 2026 map still lists 3.76 Bcf/d under construction.
Corpus Christi Stage III / Cheniere	First midscale trains exported commissioning cargoes in 2025; additional trains continue completion.	Included in FERC under-construction total, expanded to 2.75 Bcf/d including Trains 8–9 approvals.
Golden Pass LNG / QatarEnergy–ExxonMobil	First train reported beginning production/commercial startup in 2026; remaining trains continue construction.	FERC Aug 2026 map lists full 2.57 Bcf/d project under construction.

6.3 Small-scale / ISO-container and marine-fuel export facilities

Facility	Location	Role / status
American LNG / Hialeah (Miami LNG)	Medley/Hialeah, Florida	Operating small-scale liquefaction; DOE list shows 0.008 Bcf/d authorization; loads ISO containers.
Eagle Maxville	Jacksonville area, Florida	Operating small-scale plant with documented first exports; truck/ISO-container supply.
JAX LNG / Dames Point	Jacksonville, Florida	Small-scale coastal plant with marine and truck loading; primarily marine fuel/domestic supply, with export authorization pathways depending on seller/cargo.
Other peak-shaving/merchant plants	Multiple states	Can supply ISO-container exports through authorized marketers; not all are purpose-built export terminals or FERC-jurisdictional.

7. Export Projects Under Construction, FID or Commissioning

The August 18, 2026 FERC map listed eight projects/expansions under construction. Several are phased, so individual trains may be commissioning or producing while the overall project remains under construction.

Project / sponsor	Location	FERC-listed capacity	Development position and indicative timing
Golden Pass / QatarEnergy–ExxonMobil	Sabine Pass, Texas	2.57 Bcf/d	Three large trains; Train 1 startup reported in 2026, remaining trains ramp later.
Plaquemines LNG / Venture Global	Plaquemines Parish, Louisiana	3.76 Bcf/d	Exporting during phased commissioning; 36 modular trains / 18 blocks.
Woodside Louisiana LNG	Calcasieu Parish, Louisiana	3.81 Bcf/d	FID in 2025; Phase 1 targets late-decade startup, commonly cited 2029.
Corpus Christi Stage III + Trains 8–9 / Cheniere	Corpus Christi, Texas	2.75 Bcf/d	Midscale trains commissioning in sequence; additional approved trains extend buildout.
Port Arthur LNG Phases 1 and 2 / Semptra	Port Arthur, Texas	3.72 Bcf/d	Trains 1–4 under construction/FID; Phase 1 earlier, Phase 2 around 2031 planning.
Rio Grande LNG / NextDecade	Brownsville, Texas	3.73 Bcf/d	Five-train development under construction/FID in phases; first phase late 2020s.
Elba Liquefaction Optimization / Kinder Morgan	Elba Island, Georgia	0.03 Bcf/d	Selective MMLS optimization while base facility operates.
CP2 LNG / Venture Global	Cameron Parish, Louisiana	3.96 Bcf/d	Phase 1 FID/construction activity after approvals; targeted around 2029.
Commonwealth LNG / Caturus	Cameron Parish, Louisiana	1.21 Bcf/d approved base	Financing/FID and groundbreaking announced in 2026; ~9.5 Mtpa; startup targeted around 2030.
Delfin FLNG 1 / Delfin Midstream	Offshore Louisiana	~4.4 Mtpa	Positive FID announced June 2026; first U.S. FLNG vessel targeted for 2030; MARAD/USCG jurisdiction.

Status reconciliation. Commonwealth and Delfin achieved material financing/FID milestones after or outside the simple FERC onshore map categories. They are shown here because “to be built” should reflect actual sanctioning as well as map status. Schedule dates remain sponsor targets, not guarantees.

8. Approved but Not Under Construction

Project	Location	FERC capacity	Comment at Aug–Sep 2026 cut-off
Lake Charles LNG / Energy Transfer	Lake Charles, Louisiana	2.27 Bcf/d	Development suspended in Dec 2025 while sponsor explored alternatives/sale; approval alone does not imply construction.
Magnolia LNG / Glenfarne	Lake Charles, Louisiana	1.22 Bcf/d	Approved; commercial redevelopment possible but major construction not reported.
Cameron LNG Train 4 / Semptra consortium	Hackberry, Louisiana	0.93 Bcf/d	Approved expansion; pending FID.
Freeport LNG Train 4	Freeport, Texas	0.74 Bcf/d	Approved expansion; no major construction reported.

Project	Location	FERC capacity	Comment at Aug–Sep 2026 cut-off
Gulf LNG Liquefaction / Kinder Morgan	Pascagoula, Mississippi	1.50 Bcf/d	Approved conversion of import terminal; not under construction.
Eagle LNG Jacksonville export project	Jacksonville, Florida	0.13 Bcf/d	Approved larger export project; distinguish from operating Maxville/JAX small plants.
Texas LNG Brownsville / Glenfarne	Brownsville, Texas	0.62 Bcf/d	Approved; requires commercial/financing execution.
Alaska LNG / Alaska Gasline Development Corp.	Nikiski, Alaska	2.76 Bcf/d	Approved integrated North Slope pipeline/liquefaction concept; exceptionally large upstream/pipeline scope.
Commonwealth LNG / Caturus	Cameron Parish, Louisiana	1.21 Bcf/d	FERC map category says not under construction, but May 2026 financing/FID/groundbreaking supports separate sanctioned-project treatment above.

9. Proposed and Pending U.S. LNG Projects

FERC’s August 2026 proposed list contains several expansions and uprates. These should not be added to supply forecasts as firm capacity until permitting, contracts, financing and FID are sufficiently advanced.

Pending / pre-filing project	Location	FERC-listed increment	Development type
Sabine Pass Stage 5 / Cheniere	Louisiana	2.60 Bcf/d	Three new trains plus BOG reliquefaction; pending FERC applications.
Gulfstream LNG	Plaquemines Parish, Louisiana	0.55 Bcf/d	New proposed facility.
Plaquemines LNG Expansion / Venture Global	Plaquemines Parish, Louisiana	4.45 Bcf/d	Major expansion application.
Rio Grande LNG Uprate / NextDecade	Brownsville, Texas	0.44 Bcf/d	Uprate of approved/constructing trains.
Plaquemines Uprate / Venture Global	Plaquemines Parish, Louisiana	1.29 Bcf/d	Uprate application.
CP2 Uprate / Venture Global	Cameron Parish, Louisiana	1.17 Bcf/d	Uprate application.
Corpus Christi Stage 4 / Cheniere	Corpus Christi, Texas	3.32 Bcf/d	New stage application.
CP2 Expansion / Venture Global	Cameron Parish, Louisiana	1.62 Bcf/d	Additional expansion application.
Rio Grande LNG Expansion / NextDecade	Brownsville, Texas	0.83 Bcf/d	Additional expansion application.

Pending / pre-filing project	Location	FERC-listed increment	Development type
Argent LNG	Port Fourchon / Lafourche Parish, Louisiana	3.45 Bcf/d FERC pre-filing; sponsor markets up to ~25 Mtpa	Large greenfield concept; FTA export authorization received, non-FTA and full development work pending.

Deepwater-port concepts such as additional Delfin vessels fall under MARAD/USCG rather than FERC terminal siting. Their pipeline, offshore safety, vessel conversion/construction, financing and commercial milestones need separate tracking.

10. LNG Export Facilities: Process and Major Equipment

- Feed-gas interconnect, metering, pressure control and inlet separation.
- Acid-gas removal for CO₂/H₂S, dehydration by molecular sieve, mercury removal and heavy-hydrocarbon/NGL control.
- Liquefaction using propane-precooled mixed refrigerant, optimized cascade, mixed-refrigerant or modular variants.
- Main refrigerant compression driven by gas turbines, steam turbines or electric motors, depending on design philosophy.
- Cryogenic heat exchangers, refrigerant storage/makeup, LNG rundown and end-flash/BOG management.
- Full-containment LNG tanks, loading pumps, marine arms, berth/dolphins, ESD and ship–shore link.
- Utilities/offsites: power generation/import, fuel gas, cooling, nitrogen, flare, firewater, wastewater, buildings and control systems.

Architecture	Examples	Engineering implications
Large conventional trains	Sabine Pass, Cameron, Freeport, original Corpus Christi	Fewer large trains; high single-train capacity; major compressor/MCHE equipment.
Midscale modular trains	Calcasieu Pass, Plaquemines, Corpus Christi Stage III	Many parallel units; factory/module strategy; complex common-utility and commissioning sequence.
Movable modular units	Elba Liquefaction	Small standardized units with distributed operation and maintenance.
Floating LNG	Delfin FLNG	Offshore vessel integration, subsea/pipeline interface, marine class and metocean constraints.

11. U.S. LNG Commercial Model and Exports

A common U.S. contract formula is Henry Hub multiplied by a fuel factor, plus a fixed liquefaction fee. Many contracts are FOB, giving the buyer destination flexibility. Other projects use integrated portfolio, tolling or equity models. EIA reported that approximately 95% of volumes contracted in 2025 used 20-year SPAs; 56% of identified volumes were Henry Hub-indexed.

Cost / value component	Commercial question
Feed gas	Henry Hub or regional index? What basis and pipeline fuel/transport apply?
Liquefaction	Fixed toll, take-or-pay obligation, fuel retention and availability guarantee?

Cost / value component	Commercial question
Shipping	FOB or DES? Vessel charter, boil-off, canal and route exposure?
Destination price	JKM, TTF or oil-linked realization; diversion and optimization rights?
Reliability	Train availability, hurricane/freeze exposure, maintenance and cargo scheduling?
Carbon attributes	Methane intensity, lifecycle reporting, certification and buyer requirements?

Europe dominated U.S. LNG demand in 2025, but the commercial strength of the model is optionality: FOB cargoes can move to the highest-value lawful destination. This also means terminal utilization responds to global netbacks, not only bilateral political commitments.

12. Regulation and Project Development

Authority	Primary role
FERC	Siting/construction authorization for onshore and nearshore terminals and interstate pipelines; NEPA environmental review; operating oversight.
Department of Energy (HGO)	Natural-gas/LNG export authorizations, including public-interest review for non-FTA exports and contract reporting.
PHMSA	Federal LNG facility and pipeline safety standards; operator integrity and incident requirements.
U.S. Coast Guard	Waterway suitability, marine safety/security, LNG carrier interface and waterfront facility requirements.
MARAD + U.S. Coast Guard	Deepwater port licensing for offshore LNG/FLNG projects.
Army Corps of Engineers	Wetlands, dredging, waterways and Section 404/10 permits.
EPA and state agencies	Air, water, waste, coastal-zone and state environmental permits.
Local authorities	Land use, building, fire, roads, tax arrangements and emergency coordination.

Development sequence: resource/market concept → site and pipeline strategy → pre-FEED/FEED and environmental baseline → commercial SPAs → FERC/DOE and other permits → EPC and financing → FID → construction → commissioning cargoes → commercial operation. These workstreams overlap; a permit or SPA alone is not equivalent to a financeable project.

13. Economics, Constraints and Strategic Outlook

Issue	Why it matters	Developer / operator response
Feed-gas basis and takeaway	LNG demand can tighten Haynesville/Permian and Gulf delivery markets.	Secure diversified interconnects, firm transport and storage.
EPC inflation and labor	Mega-project simultaneity strains craft labor, modules and major equipment.	Standardize, phase trains, lock long-lead items and align execution capacity.
Power and fuel efficiency	Liquefaction consumes substantial energy and affects emissions.	Optimize drivers, heat integration, electrification and ambient-temperature performance.

Issue	Why it matters	Developer / operator response
Hurricanes, flooding and freezes	Gulf concentration creates correlated weather risk.	Elevate/protect equipment, harden power, plan shutdown/restart and diversify sites.
Regulatory/litigation schedule	Federal and state approvals can be remanded, amended or delayed.	Maintain robust record, stakeholder engagement and schedule contingency.
Global price cycles	High delivered cost can reduce utilization; low prices pressure margins.	Use take-or-pay SPAs, portfolio flexibility and disciplined capital structure.
Methane and lifecycle emissions	Buyers, lenders and regulators increasingly scrutinize full-chain emissions.	Measure, certify, reduce leaks/flaring and procure lower-intensity gas.

Outlook. The United States is positioned to expand LNG exports through the late 2020s and early 2030s, but announced capacity materially exceeds the projects likely to be built. The winners will combine low-cost gas access, multiple pipeline interconnects, strong sponsors and offtakers, executable EPC plans, regulatory durability and reliable operations. Haynesville and Permian growth are especially important, while Appalachian gas could contribute more if southbound takeaway expands.

14. Project-Development Checklist

- Reconcile regulatory, physical commissioning and commercial-operation status train by train.
- Build monthly basin supply and pipeline-flow cases, including winter and hurricane constraints.
- Secure firm feed-gas transportation and at least two meaningful supply/interconnect options.
- Validate feed composition and pretreatment margin across all expected sources.
- Select train architecture and execution strategy consistent with labor, module-yard and long-lead capacity.
- Integrate marine, dredging, geotechnical, flood, storm-surge and facility-siting studies with FEED.
- Stress-test Henry Hub basis, fuel retention, power price, EPC escalation, shipping and destination netbacks.
- Align FERC, DOE, PHMSA, USCG, Corps, EPA/state and local permit schedules.
- Define commissioning gas, first-LNG, cargo acceptance, performance tests and SPA start dates.
- Quantify methane and lifecycle emissions and establish auditable measurement/reporting.

Appendix A. Facility Inventory Interpretation

The tables are designed to be comprehensive for significant U.S. export liquefaction projects identifiable in the August 18, 2026 FERC map, DOE materials and current project announcements. “All” is inherently time-sensitive: sponsors rename, resize, suspend, sell or refile projects, and offshore/small-scale facilities may fall outside FERC’s onshore map. A transaction or investment decision should refresh FERC, DOE, MARAD/USCG and operator sources immediately before use.

Appendix B. Sources and Data Notes

1. FERC, U.S. LNG Export Terminals—Existing, Approved Not Yet Built, and Proposed, 18 Aug 2026. [https://www.ferc.gov/sites/default/files/2026-08/LNG%20Maps%20for%20the%20Web%20\(2026-08-18\)%20-%20Exports.pdf](https://www.ferc.gov/sites/default/files/2026-08/LNG%20Maps%20for%20the%20Web%20(2026-08-18)%20-%20Exports.pdf)
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Data note: Facility capacities can represent authorization limits, nominal liquefaction output, peak output or feed-gas demand. Project schedules and construction status can change between regulatory map updates. Values in this report support industry orientation and pre-FEED screening, not securities, contracting or permitting decisions.