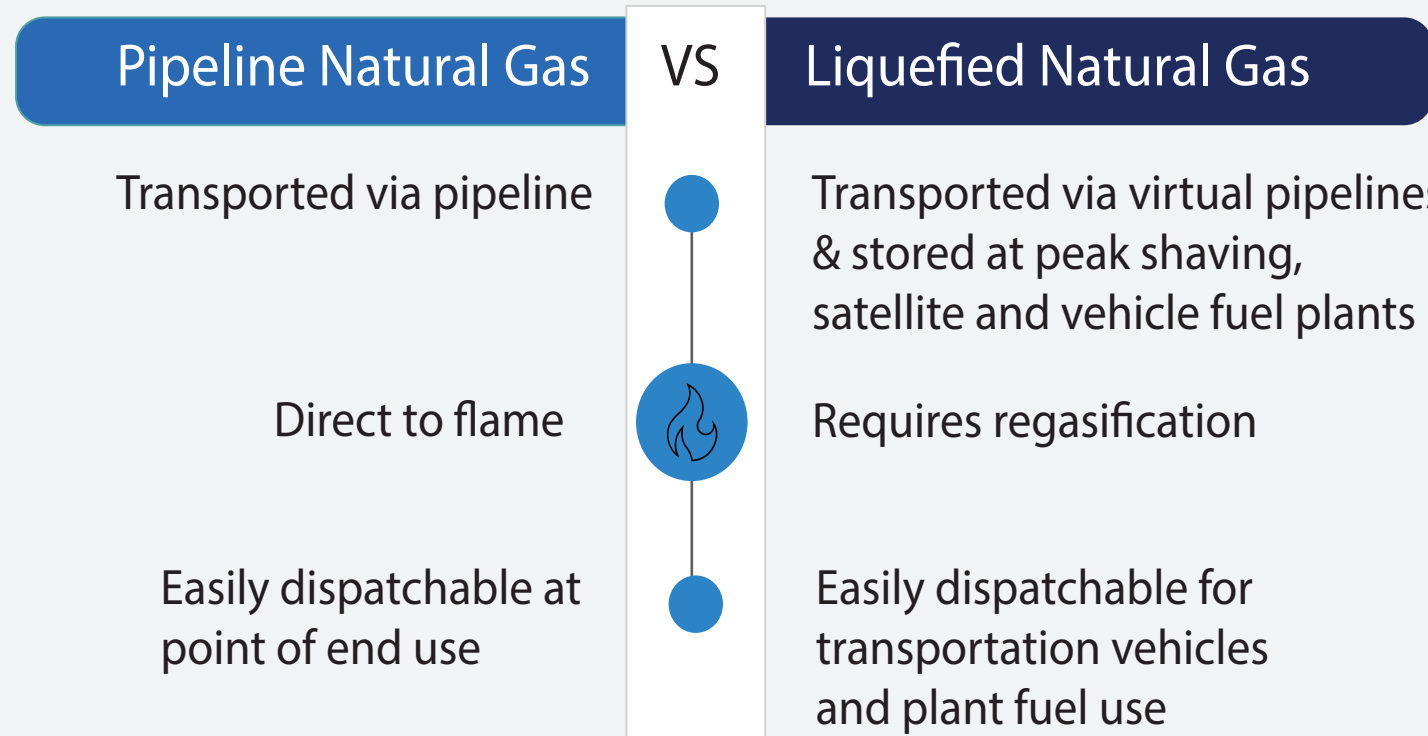


2026 U.S. LNG Outlook

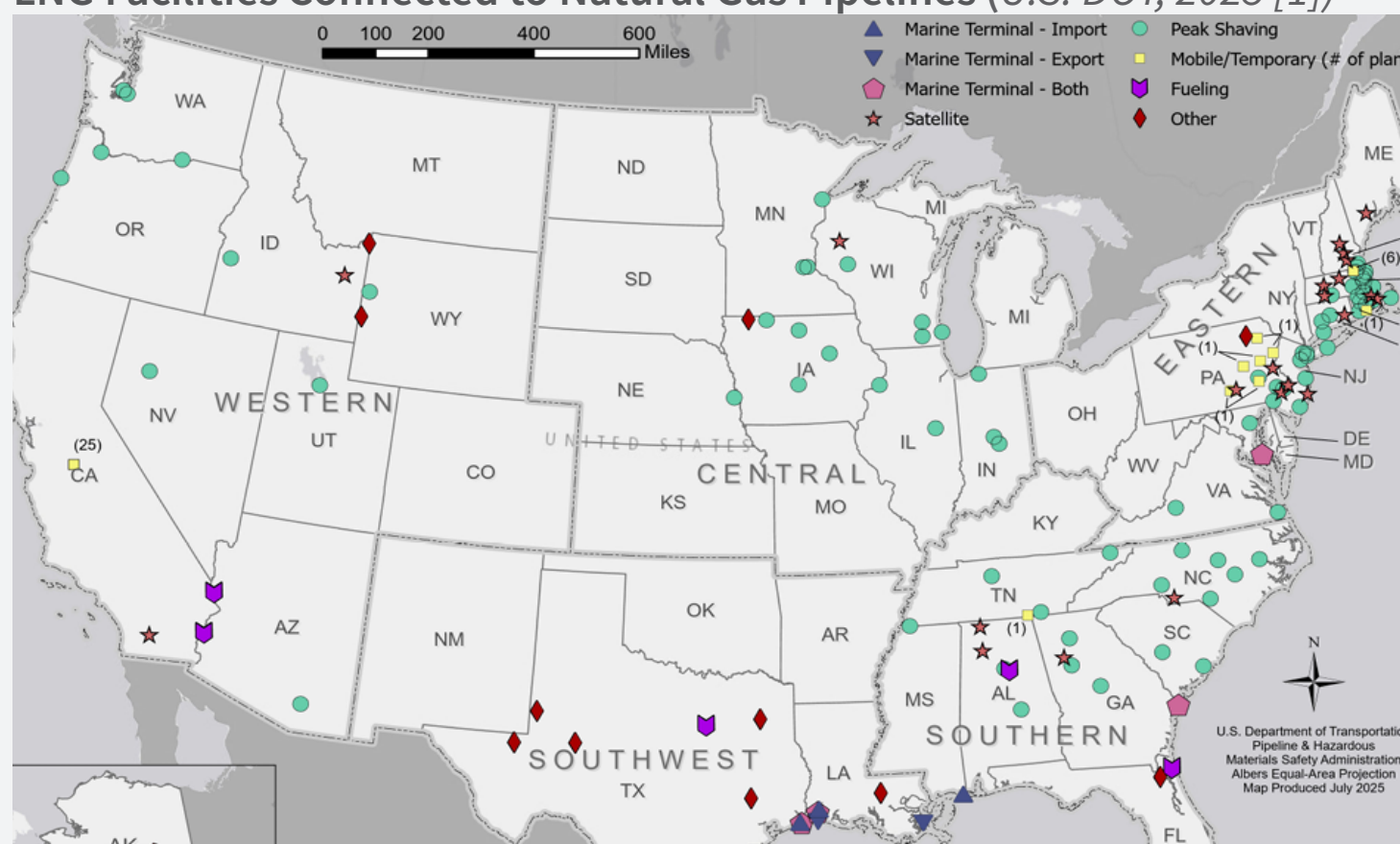
When natural gas is super chilled to -260°F, it becomes a more energy dense, easily storable form of energy called liquified natural gas (LNG). The condensed storage of LNG is beneficial to facilities isolated from pipeline infrastructure, which lends to LNG being utilized as a “back pocket” fuel source to buffer against weather-related disruptions and high demand events. LNG production in the U.S. serves both domestic and international markets.



Domestic Use

LNG end use is heavily concentrated in transportation and industrial applications. As of 2025, there are 24 active LNG transportation fueling stations in the U.S. which connect major corridors across different U.S. regions.[2] LNG can also be found as a plant fuel. Peak-shaving plants convert pipeline gas to LNG to reserve affordable fuel as a critical backup to be leveraged during high demand, similar to the role of underground storage fields.

LNG Facilities Connected to Natural Gas Pipelines (U.S. DOT, 2025 [1])



According to the U.S. DOT, there are over 170 LNG facilities currently operating in the U.S. [3]

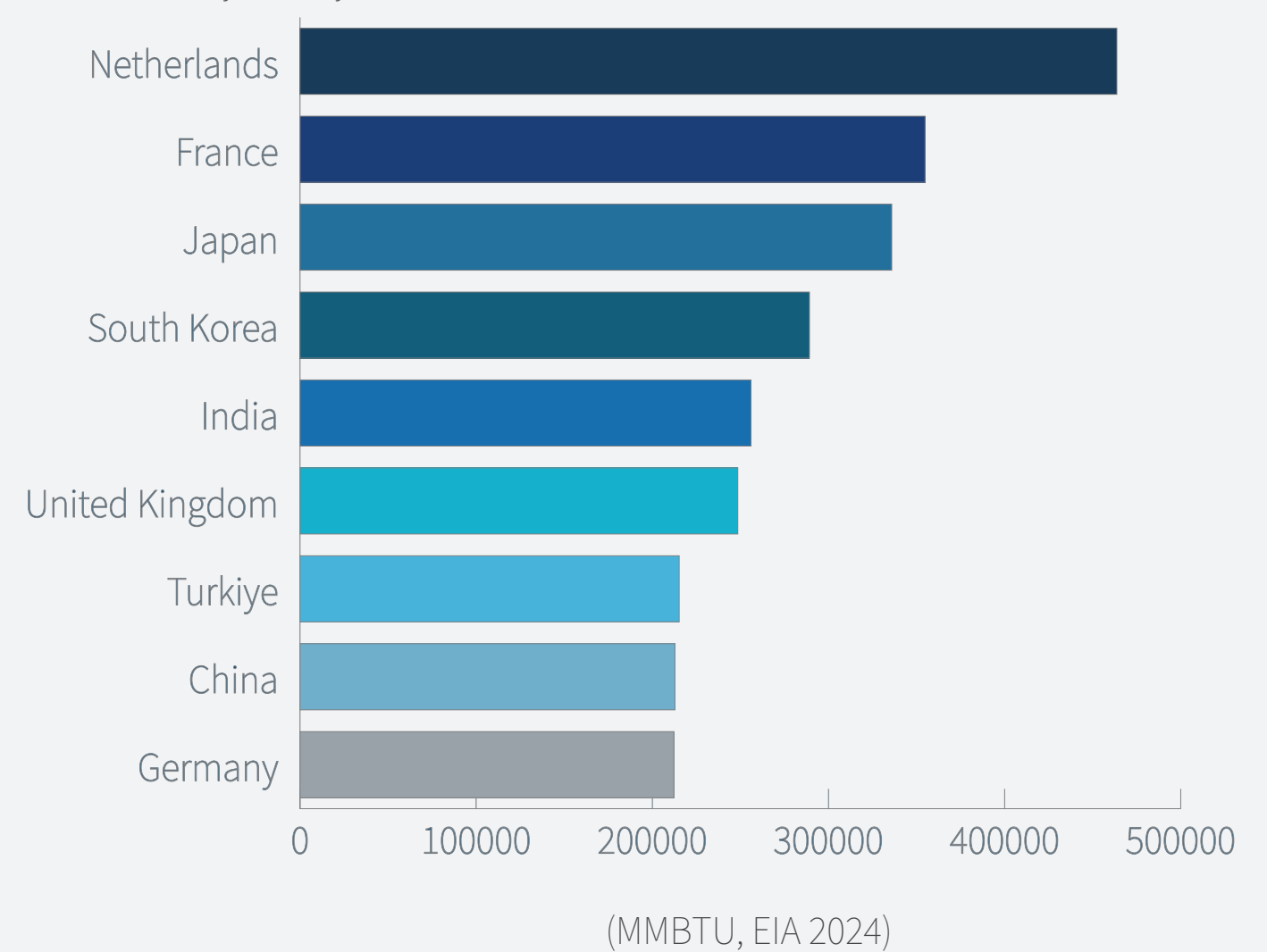
Peak shaving plants ensure reliable delivery of natural gas when demand peaks unexpectedly such as during severe weather events. According to NOAA, the severity of hurricanes and heat waves are projected to worsen in the coming decades [4], [5].

These increasing impacts from inclement weather events may necessitate greater reliance on peak shaving infrastructure in the future and diversification of energy sources to ensure reliability and affordability of energy to U.S. customers.

LNG Exports

Aside from domestic use, U.S. LNG exports have rapidly increased (nearly +200%) from 2015 to 2024.[6] These LNG exports are exported via hundreds of marine LNG carrier vessels and virtual pipeline networks to end users across North America, and to countries in Asia and Europe. In many of these countries imported LNG plays a vital role in fueling industrial processes, power generation, and transportation.

Where ~70% of U.S. LNG Exports went in 2024 (MMBtu by Country)



The United States became the largest exporter of LNG in 2023 and has maintained this status through 2025. [7] U.S LNG export markets have been on an upward trend since 2016 and are continuing to grow. To meet growing demand, various LNG facility projects are currently underway along the Gulf and East Coasts. **EIA projects U.S. LNG export capacities will double by 2029.** [8]

Along with LNG terminal developments, domestic purposed LNG infrastructure continues to be constructed. As energy demand grows, energy storage solutions like peak shaving plants, are relied on to maintain price and delivered fuel stability.

References

- [1] U.S. Department of Transportation. (2026). LNG Plants Connected to Natural Gas Pipeline Systems Map. https://www.npms.phmsa.dot.gov/Documents/LNG_AR_National.pdf
- [2] U.S. Department of Energy. (2026). Alternative Fueling Station Locator. <https://afdc.energy.gov/stations#/corridors?fuel=LNG>
- [3] U.S. Department of Transportation. (2026). LNG Facility Siting. <https://www.phmsa.dot.gov/pipeline/liquified-natural-gas/lng-facility-siting>
- [4] U.S. NOAA, 2026. The Climate Explorer. <https://crt-climate-explorer.nemac.org/>
- [5] U.S. NOAA, 2021. U.S. Tropical Cyclone Activity in the 2030s Based on Projected Changes in Tropical Sea Surface Temperature.
- [6] U.S. Energy Information Agency. (2026). Liquefied Natural Gas Exports. <https://www.eia.gov/dnav/ng/hist/n9133us2m.htm>
- [7] U.S. Energy Information Agency. (2025). The United States remained the world's largest liquefied natural gas exporter in 2024. <https://www.eia.gov/todayinenergy/detail.php?id=64844>
- [8] U.S. Energy Information Agency. (2025). North America's LNG export capacity could more than double by 2029. <https://www.eia.gov/todayinenergy/detail.php?id=66384>