

# The U.S. LNG pause curbs its export overbuild without compromising Europe's energy security

## Key points

- The Biden Administration's January 2024 decision to pause approvals of non-Free Trade Agreement (non-FTA) export authorizations for liquefied natural gas (LNG) export proposals impacts 88.9 million tonnes per annum (mtpa) of proposed capacity, according to analyses from Global Energy Monitor (GEM) and Sierra Club.
- These projects represent one-quarter of all export capacity in development in the United States and one-tenth of all such capacity globally.
- The pause has a minimal impact on near-term U.S. LNG exports and would not compromise energy security in Europe, which is already receiving sufficient LNG from the U.S..
- Only 14% of potential capacity additions over the next three years are affected by the pause. Meanwhile, U.S. LNG export capacity is poised to increase by more than half over the same time period, and Europe's gas demand is forecast to decline.

In January 2024, the [Biden Administration announced a pause](#) on the Department of Energy (DOE) authorizing proposed LNG terminals to export gas to non-FTA countries, during which it will reassess whether such projects are in the public interest, the key criterion for authorization. The impacts of the pause on U.S. and global LNG development, including its effects on Europe, have at times been [misunderstood or misrepresented](#), for instance, with the American Petroleum

Institute calling the pause a “win for Russia” and “broken promise to U.S. allies.”

This briefing is intended to help contextualize the impacts of the pause on U.S. projects,<sup>1</sup> which could curb an already overblown U.S. LNG buildout without compromising Europe's energy security – crucially, if the pause holds or leads to new guidance discouraging future

---

<sup>1</sup> Two Mexican projects are affected by the pause.

DOE authorization of these projects. GEM's analyses draw on global LNG terminal data from the [Global Gas Infrastructure Tracker](#) and

Sierra Club's assessment of which projects may be impacted by the pause given permitting data in its [US LNG Export Tracker](#).

## The pause could curb the overbuild of U.S. LNG export projects

The U.S. was the [world's largest exporter of LNG](#) in 2023, and with 336.9 mtpa of new [LNG capacity in development](#) — projects proposed or under construction — its pipeline of projects dwarfs that of every other gas exporting country. As GEM has previously written, the U.S. LNG buildout is [not in the public interest](#) — LNG exports [raise domestic gas prices](#), [lock in fossil fuel emissions](#) abroad, and [threaten Gulf Coast communities](#) already burdened by oil and gas pollution.

Sierra Club's [tracking](#) of project permits finds that twelve U.S. LNG projects in development are subject to the Biden Administration's pause on LNG export authorizations to non-FTA countries (see Table 1). Because the list of [FTA countries](#) excludes much of the global LNG market, including virtually all of Europe and Asia, most export projects cannot be commercially viable without this authorization, and the pause effectively freezes these pending applications.

In total, paused projects amount to 88.9 mtpa of proposed export capacity, or one-quarter of all LNG export capacity in development in the United States and one-tenth of all such capacity globally. Two projects in Mexico are affected by the pause as well, [Saguaro Energía LNG Terminal](#) and [New Fortress Altamira FLNG Terminal](#), which have 6.13 mtpa and 3.07 mtpa export capacity pending DOE approval, respectively.

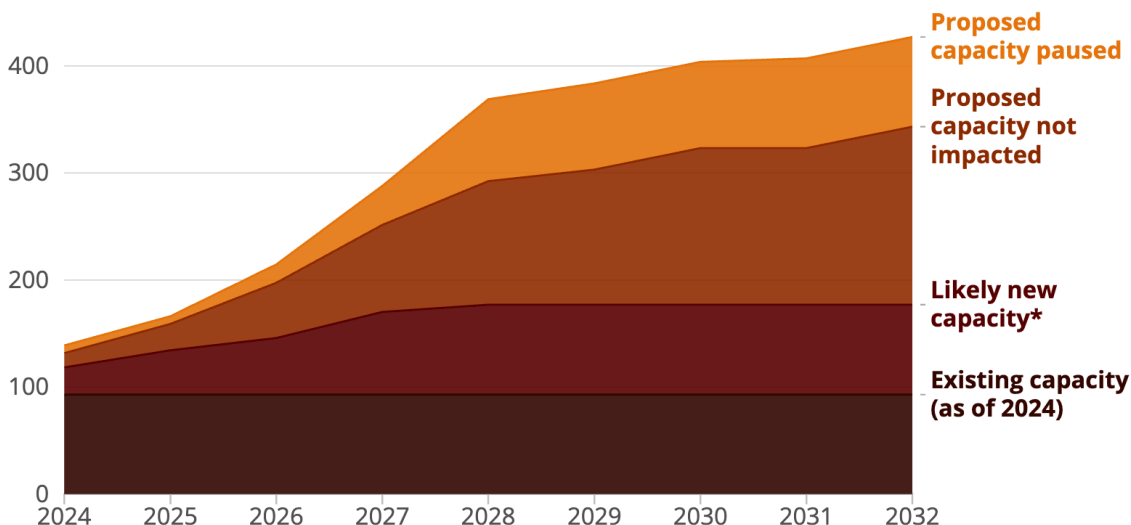
A halt to these projects, if sustained, could have a significant impact on curbing global greenhouse gas emissions. The potential annual emissions associated with these projects could be as high as 381 megatonnes CO<sub>2</sub> equivalent, on par with that of almost [100 coal plants](#).<sup>2</sup> Stopping the development of these projects would be in line with the International Energy Agency's net zero pathway, under which [global LNG exports should peak](#) by the middle of the decade.

---

<sup>2</sup> This estimate uses LNG life cycle emissions modeled in a 2019 National Energy Technology Laboratory [study](#), averaged between the study's scenarios for U.S. exports to Asia and Europe, for global warming potential on a 100-year basis. It is assumed that export terminals are used at full capacity and that the exported gas is consumed for power.

## The U.S. LNG pause impacts one-quarter of U.S. export capacity in development

U.S. LNG export capacity in million tonnes per annum (mtpa) by anticipated start year

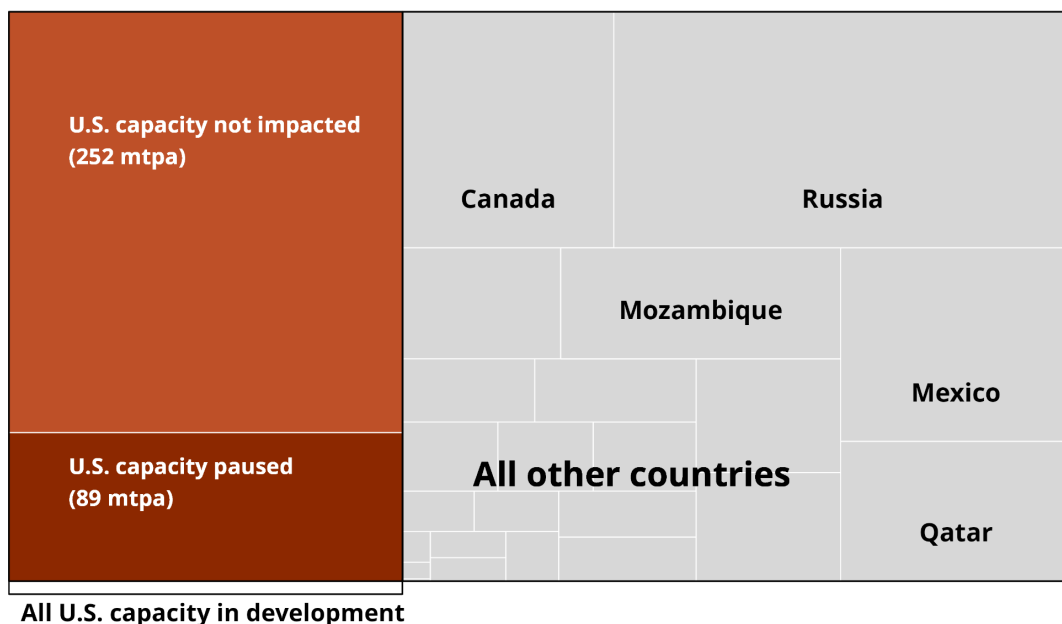


Source: Global Gas Infrastructure Tracker, Global Energy Monitor; US LNG Export Tracker, Sierra Club •  
 \*Likely new capacity includes projects in construction and proposed projects that have reached a final investment decision (FID)



## The U.S. pause impacts one-tenth of LNG export capacity in development globally

Proposed and in-construction LNG export capacity, in million tonnes per annum (mtpa)



Source: Global Gas Infrastructure Tracker, Global Energy Monitor; US LNG Export Tracker, Sierra Club



## The pause does not harm Europe's energy security

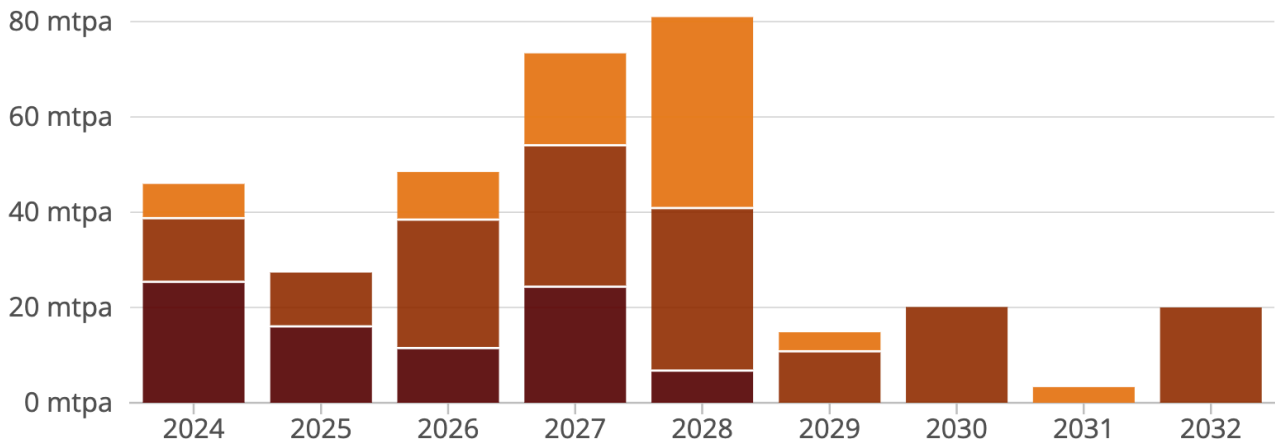
The LNG pause would have a minimal impact on U.S. LNG exports in the near-term, despite oil and gas industry claims that it would compromise Europe's energy security. According to GEM and Sierra Club data, just 14% of potential capacity additions within the next three years (2024 to 2026), totaling 17.2 mtpa, are impacted by the pause. The U.S. is already [surpassing its LNG commitments](#) to Europe, and U.S. export capacity is poised to increase more than 50% over the next three years from projects unaffected by the pause that are in construction or have reached final investment decisions (FIDs).

Europe, meanwhile, has [emerged from its gas crisis](#) and is expected to need less U.S. LNG in the coming years. The Institute for Energy Economics and Financial Analysis (IEEFA) forecasts that [EU gas demand could fall 16%](#) by 2030 and that “the continent's LNG demand [will] peak in 2025 — far earlier than U.S. export projects affected by the pause would enter the market.” Declining gas demand is driven by Europe's accelerating energy transition, including improved energy efficiency, demand management, and increased deployment of renewables. And given LNG's vulnerability to price volatility and supply disruptions, these trends—not increased U.S. gas exports—will ultimately enhance Europe's energy security.

## Biden's LNG pause has a minimal impact on near-term U.S. export capacity additions

U.S. LNG export capacity additions in million tonnes per annum (mtpa) by anticipated start year

■ Proposed capacity paused ■ Proposed capacity not impacted ■ Likely new capacity\*



Source: Global Gas Infrastructure Tracker, Global Energy Monitor; US LNG Export Tracker, Sierra Club •  
\*Likely new capacity includes projects in construction and proposed projects that have reached a final investment decision (FID)

The list of LNG export projects affected by the Administration's pause is shown in the following table.

Project	Paused capacity	Planned Start Year
U.S.		
<a href="#">Commonwealth LNG Terminal</a>	9.3 mtpa	2027
<a href="#">Calcasieu Pass LNG Terminal Uprate</a>	0.46 mtpa	2024
<a href="#">Port Arthur LNG Terminal Phase 2</a>	13.5 mtpa	2028
<a href="#">CP2 LNG Terminal Phase 1</a>	10 mtpa	2026
<a href="#">CP2 LNG Terminal Phase 2</a>	10 mtpa	2027
<a href="#">Lake Charles LNG Terminal</a>	17.8 mtpa	2028
<a href="#">Magnolia LNG Terminal</a>	8.8 mtpa	2028
<a href="#">Plaquemines LNG Terminal Uprate</a>	3.53 mtpa	2024
<a href="#">Corpus Christi LNG Terminal Stage 3 Expansion</a>	3.28 mtpa	2031
<a href="#">Elba Island LNG Terminal Uprate</a>	0.4 mtpa	2024
<a href="#">Gulfstream LNG Terminal</a>	4 mtpa	2029
<a href="#">New Fortress Grand Isle FLNG Terminal</a>	2.8 mtpa	2024
<a href="#">Fourchon LNG Terminal</a>	5 mtpa	*
Mexico		
<a href="#">New Fortress Altamira FLNG Terminal</a>	3.07 mtpa	2025
<a href="#">Saguaro Energía LNG Terminal Phase 1 Expansion</a>	6.13 mtpa	2027
<p>Source: US LNG Export Tracker, Sierra Club; Global Gas Infrastructure Tracker, Global Energy Monitor. GEM capacity data is used by default where small discrepancies exist between the two datasets.</p> <p>*Note: Fourchon LNG Terminal has passed its planned start dates and revised start dates are unavailable. For this reason, the facility's capacity is excluded from Figures 1 and 3</p>		

## About the Global Gas Infrastructure Tracker (GGIT)

[GGIT](#) is an information resource on natural gas transmission pipeline projects and liquefied natural gas (LNG) import and export terminals. The internal GGIT database and wiki pages are updated continuously throughout the year, and

an annual release is published and distributed with data summary tables. The data are released under a creative commons license and can be downloaded [here](#).

## About Global Energy Monitor

Global Energy Monitor (GEM) develops and analyzes data on energy infrastructure, resources, and uses. We provide open access to information that is essential to building a sustainable energy future.

GEM data is used by the International Energy Agency (IEA), the OECD Environment Directorate, UN Environment Programme, U.S.

Treasury Department, and World Bank. GCPT data is licensed by Bloomberg LP and UBS Evidence Lab, and is used by the Economist Intelligence Unit and Bloomberg New Energy Finance.

Follow us at [www.globalenergymonitor.org](http://www.globalenergymonitor.org) and on Twitter/X @GlobalEnergyMon.

---

### MEDIA CONTACT

**Rob Rozansky**

Research Analyst

[rob.rozansky@globalenergymonitor.org](mailto:rob.rozansky@globalenergymonitor.org)

+1-763-221-3313