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Compiled by Larry Persily
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Indigenous majority-owned LNG project in Canada first in the world

(Reuters; Sept. 19) - When Maureen Nyce, the new chief of the Haisla First Nation, put on a hard hat and safety vest for an August visit to the site of the Cedar LNG pipeline, she did so not as a visiting dignitary or cultural emissary — but as an owner. The Haisla — who have occupied territory on Canada's Northwest coast for 9,000 years — own a 50.1% equity stake in the US$4 billion Cedar LNG export project near the town of Kitimat, British Columbia. Calgary-based Pembina Pipeline owns the remainder.

The world's first Indigenous majority-owned LNG project, expected to start up in 2028, could hugely change the future of Nyce's people and serve as a test case for Canada, which has just started shipping LNG to Asia. But getting Cedar from idea to reality relied on several unique factors. The 3.3 million-tonne-per-year project benefited from an existing pipeline, near-unanimous community support, and a first-of-its-kind loan.

One major component was a 2018 deal that gave the Haisla access to 400 million cubic feet per day of capacity on the 415-mile Coastal GasLink pipeline that brings gas to the four-times-larger Shell-led LNG Canada plant, also in Kitimat. LNG Canada — which this year shipped Canada's first LNG to Asia — sits on Haisla land. To secure Haisla support for its project, Shell started consultations with the First Nation in 2013.

For Cedar LNG, 60% of the project's construction cost will be funded by a term loan with a syndicate of banks, while 40% will be financed through equity contributions from both partners. The Haisla borrowed $1.4 billion from the First Nations Finance Authority, a nonprofit corporation owned and controlled by First Nation governments, to fund their equity share, Nyce said. It is the largest loan the nonprofit has issued to date, and one of the largest ever issued to a First Nation in Canada.

Canada's independent gas producers could gain access to Asia

(Financial Post; Canada; Sept. 23) - A major proposed liquefied natural gas project in British Columbia is seen by many in the oil patch as even more critical for Canada's gas producers than LNG Canada, the country's first export terminal. But analysts warn its future remains uncertain. Ksi Lisims LNG, the First Nations-led project on the northwest coast, received key environmental approvals last week from provincial and federal governments — although a final investment decision is still to come later this year.

Ksi Lisims LNG “may be the most Canadian project of all because of its Indigenous participation,” said Ian Archer, a natural gas analyst at S&P Global. “The backers of it are more of these smaller, independent, Canadian-headquartered companies — and for producers like them, this is a much bigger deal than LNG Canada,” which is led by Shell and Asian partners. At 12 million tonnes per year, Ksi Lisims is a joint venture between the Nisga’a Nation, U.S. developer Western LNG and Rockies LNG.

Rockies LNG is a consortium of mostly Canadian independent gas producers, whereas LNG Canada is owned by global or state-owned Asian energy companies including Shell, Petronas, PetroChina, Mitsubishi and Korea Gas. Three of the partners have their own upstream production in Canada and have the right to move their own gas through the facility. As a result, many Canadian producers remain on the sidelines, watching as the partners secure higher returns from premium Asian markets.

“To be involved in an LNG project, to have access to those new markets, potentially with premium pricing, the producers had to essentially develop their own project and obviously find their own partners who could help us with that vision,” said Rockies LNG CEO Charlotte Raggett. That led to the joint partnership behind Ksi Lisims LNG.

U.S. energy secretary says department will help Alaska LNG project

(Energy Wire; Sept. 25) – U.S. Energy Secretary Chris Wright said Sept. 24 the Trump administration will likely provide “a little bit” of financial support from the Energy Department, possibly credit support, for a proposed massive liquefied natural gas project in Alaska. Such a move would ratchet up the U.S. government’s already deep involvement in getting the project started despite its struggles to find private investors.

The $44 billion project would move gas from Alaska’s North Slope south to a proposed facility to liquefy and ship it to Asian markets. “I’m sure it’ll likely be some mix of American companies, Asian companies,” Wright said of the potential financiers during a New York City press conference. “The U.S. government will probably support it a little bit, from my department, with credit support or whatever.” Federal law already allows the department to provide loan guarantees for the project. Wright did not provide further details on what the department might do to assist the project’s finances.

Wright called the project an economic and geopolitical priority for Trump, noting it would supply allies in East Asia with energy. The project, led by private developer Glenfarne \, with the state of Alaska holding a minority stake, is waiting on an updated construction cost estimate as it pursues customers for the LNG and investors in the venture.

Sempra takes FID to double capacity at Port Arthur LNG in Texas

(Reuters; Sept. 23) - Sempra said on Sept. 23 that it would sell a 45% stake in its infrastructure unit for $10 billion and has approved a $14 billion expansion to double the capacity of its Port Arthur LNG project in Texas, sending the utility's shares to their highest in nearly seven months. The sale is to the private-equity investment firm KKR, along with the Canada Pension Plan Investment Board. Sempra Infrastructure Partners holds liquefied natural gas assets and pipeline and storage infrastructure.

The KKR-led consortium will hold 65% of the infrastructure unit, while Sempra will retain 25% and Abu Dhabi Investment Authority will keep 10% after the deal closes, which is expected between the second and third quarters of 2026. Private-equity firms have been aggressively investing in power infrastructure, driven by surging electricity demand from AI data centers and rising U.S. consumption. For Sempra, the deal will eliminate the need to issue stock to fund its $56 billion capital plan for 2025–2029.

The company also announced that Sempra Infrastructure Partners has reached a final investment decision for the expansion of Port Arthur LNG Phase 2. The project will add two liquefaction trains and increase capacity by 13 million tonnes per year. Commercial operations are planned for 2030 and 2031. The two liquefaction trains of Phase 1, also totaling 13 million tonnes annual output capacity, are under construction and expected to start production in 2027 and 2028. ConocoPhillips is a partner in Port Arthur LNG.

Golden Pass LNG in Texas moves closer to startup

(Bloomberg; Sept. 23) - Golden Pass LNG has been granted permission to re-export liquefied natural gas from the Texas facility as it prepares for startup at the end of this year. The U.S. Department of Energy has allowed Golden Pass to export LNG that was previously imported from foreign sources, according to the order published on the department’s website. LNG terminals typically import the super-chilled gas to cool down their storage tanks and equipment before starting production, then re-export what they don’t use in operations.

The Golden Pass terminal is nearing the start of operations. ExxonMobil, which is developing the facility with QatarEnergy, said earlier this month that it’s confident that mechanical completion will happen in December and first LNG will come “right at that point or shortly thereafter.” The timing of the startup is closely watched as the project faced delays. The plant is designed for 18 million tonnes annual production capacity. Exxon has not publicly updated previous development cost estimates of $10 billion.

B.C. First Nations alliance hard against lifting ban on oil tankers

(Coast Mountain News; British Columbia; Sept. 19) - The president of British Columbia's Coastal First Nations alliance was unequivocal when asked if there is any possibility the group would consent to the federal government lifting the oil tanker ban in the area to allow for a new pipeline from Alberta. "No," Heiltsuk Nation Chief Marilyn Slett said. Slett added that no one from the Alberta or federal government has asked First Nations about their stance. Nevertheless, Alberta Premier Danielle Smith has pushed the idea.

Slett has let British Columbia know where the group stands, and said she was "encouraged" to hear B.C. Premier David Eby point this out to reporters in Ottawa on Sept. 18. "There's no support from First Nations along the coast," Eby said in Ottawa. "In fact, nobody's talked to them, and this project is non-existent." Eby also took a shot at Smith, who formerly worked on behalf of oil and gas interests as a registered lobbyist.

"Premier Smith from Alberta, she's an incredible advocate, because you would never guess that there is no private proponent, there is no money, there's no project," Eby said. In 2019, the federal government imposed a ban on heavy oil tankers off B.C.'s north coast. But as conversations about trade have evolved since U.S. President Donald Trump began threatening Canada with tariffs, the idea of a new pipeline to the coast was resurrected. Smith has been the most vocal and high-profile proponent.

First Nations group supports new oil pipeline to B.C. coast

(Calgary Herald; Sept. 22) - A First Nations group in favor of oil and gas development is pushing for a new pipeline similar to Northern Gateway, an ill-fated project opposed by many Indigenous communities. Dale Swampy, chief executive of the National Coalition of Chiefs, said a line to the northern coast of British Columbia — a project he called "Northern Gateway 2.0." — would lift Indigenous groups and help alleviate poverty.

Enbridge's Northern Gateway would have shipped oil from Alberta to a terminal in Kitimat, British Columbia, but the Canadian federal government effectively killed the pipeline. The project faced strong opposition from environmental groups and many First Nations, who worried a spill would have devastating impacts on their communities. The Federal Court of Appeal struck down Ottawa's approval of the pipeline, ruling that the government had failed to properly consult with Indigenous groups.

Swampy, a member of the Samson Cree Nation south of Edmonton, was part of Enbridge's Indigenous consultation team as well as a group that negotiated economic benefits for communities along the route. After Gateway failed, he formed the pro-development National Coalition of Chiefs with the goal of "defeating on-reserve poverty" with natural resource projects. A pipeline to the coast, he argued, would open the door for First Nations to reap economic prosperity. He said he supports Alberta Premier Danielle Smith's ambitions to have a pipeline ship Alberta oil to Prince Rupert.

Exxon announces next addition to Guyana oil production

(Forbes; Sept. 22) - ExxonMobil, which heads up the consortium developing the massive Stabroek oil and gas resource play offshore Guyana, announced Sept. 22 that it has reached final investment decision on its Hammerhead project after receiving regulatory approvals. Hammerhead is the seventh major project undertaken by the consortium at Stabroek and is expected to achieve first production in 2029.

Exxon serves as operator for the consortium, in which it owns a 45% working interest. The other partners include China National Offshore Oil Corp. (CNOOC), which owns 25%, and Chevron, which owns 30%. Chevron formally became a consortium partner earlier this year with the completion of its $53 billion acquisition of Houston-based independent Hess Corp. This latest milestone at Stabroek comes just six weeks following Exxon's announcement that the consortium had increased overall capacity to 900,000 barrels of oil per day ahead of schedule with the startup of its Yellowtail project.

Yellowtail, the consortium's fourth project at Stabroek, has a production capacity of 250,000 barrels per day, relying on a production, storage and offloading vessel built and operated by Netherlands-based SBM Offshore. The fifth and sixth Stabroek projects, Uaru and Whiptail, are under construction. Exxon projects startup for Uaru in 2026, with Whiptail coming online in 2027. Exxon estimates total capital outlays of $6.8 billion at the Hammerhead project, which will include 18 production and injection wells, increasing the funds committed for seven Stabroek projects to more than $60 billion.

Chevron considers expanding into LNG regas terminals in Europe

(Reuters; Sept. 22) - Chevron is in early-stage talks to explore opportunities in European regasification terminals, as part of its strategy to expand its global presence in the liquefied natural gas market, a senior executive told Reuters. The U.S. has become Europe's top LNG supplier since the continent sharply reduced its imports of Russian gas following Moscow's invasion of Ukraine in 2022. Chevron, which is contracted to export 7 million tonnes per year of LNG from the U.S. starting in 2026, has significantly ramped up its LNG trading operations.

While not yet operating at the scale of Shell or TotalEnergies, the company is a major player among global energy firms. "We see regas as more of a national security thing for Europe," Freeman Shaheen, Chevron's president of global gas told Reuters on the sidelines of the Gastech conference in Milan. "We are in discussions with a number of European players around regasification. We are looking at existing infrastructure and new infrastructure," he said, declining to give further details.

Europe's pipeline gas imports from Russia have fallen sharply since 2022, and the European Commission has called for member states to end their reliance on Russian fossil fuels by 2027. With LNG playing a growing role in the continent's energy mix, industry experts say additional regasification capacity will be essential to meet demand.

Norwegian explorers succeed in finding 'missing' oil

(The New York Times; Sept. 23) - Five years ago, explorers at a Norwegian oil company called Aker BP had a contrarian idea. They believed there might be a lot of oil lurking in an offshore gas field that was thought to be played out, and they persuaded Aker BP to let them go after this "missing" oil. Their hunch has paid off in significant oil discoveries. In recent months, for instance, Aker BP has located a series of troves, known collectively as Omega Alfa, that may produce more than 130 million barrels of recoverable oil, the largest find in Norwegian waters this year.

In making the discoveries, Aker BP's explorers not only tested intellectual concepts, but also pushed physical limits, drilling horizontal wells nearly seven miles long, a record for Norway. The country supplies roughly 30% of Europe's gas demand and around 15% of its oil, according to Wood Mackenzie, a consulting firm. Those volumes help give it great strategic and economic importance, especially with reduced energy flows from Russia because of the war in Ukraine. Despite more than 50 years of production, Norway's overall output of oil and gas has held relatively steady for the past three decades.

"It's kind of amazing how you see projected decline not happening," said Egil Tjaland, an associate professor of geoscience at Trondheim's Norwegian University of Science and Technology, where many oil industry professionals have studied. Avoiding decline in the coming years will require ingenuity as well as investment, analysts say. "The easy discoveries have already been made," said Daniel Rogers, a Norway analyst at Wood Mackenzie. "It's now about pushing the boundaries in terms of new technology, new ways of drilling and thinking a bit outside the box."

Nordic power companies look to profit from data center demand

(Bloomberg; Sept. 22) - Nordic power companies stand to win big from Europe's data-center boom, as cool weather and lower power prices entice more mega-projects northward. Data center power demand in the Nordics could rise fourfold by 2032, Bloomberg Intelligence data shows, boosting the earnings potential for Vattenfall, Statkraft, Fortum and Orsted. Regional consumption could grow by 14% to 19% annually until then, faster than the European Union average — including larger markets like Germany, Bloomberg Intelligence analysts Joao Martins and Patricio Alvarez said.

Lower prices, ample land availability and naturally cooler weather are pushing key players like Alphabet, Microsoft and Meta Platforms to expand their regional footprint. Companies supplying nuclear and hydroelectric power stand to benefit the most, given the sheer amount of electricity needed to power data centers. The data center cluster is currently the fastest-growing power demand segment in the region, Simon-Erik Ollus, Fortum's executive vice president of corporate customers and markets, told Bloomberg.

The region also boasts Europe's cleanest power generation mix — another key attraction. Brookfield Asset Management's 95 billion-krona ($10 billion) investment announced in June centers on a 750-megawatt data center in Strängnäs, Sweden, which is expected to reach full capacity in 10 to 15 years. OpenAI unveiled its first data center initiative in Europe a month later — Stargate Norway — which will eventually deliver 520 megawatts of capacity. Those two projects alone could double Nordic data center power demand from 2024 levels.

West Texas lacks enough gas lines and power plants to meet demand

(The Texas Tribune; Sept. 23) - Big data centers that power the artificial intelligence industry demand an abundance of energy. West Texas — known for producing 40% of the nation's oil — also has an extraordinary amount of gas that could power data centers. But the region lacks adequate infrastructure to convert the gas, a byproduct of pumping oil, into electricity and transmit it to the growing industry, experts said.

"Meeting this unprecedented demand takes more than production alone," said Ed Longanecker, president of the Texas Independent Producers and Royalty Owners Association, a trade group. "It requires a strong network of pipelines and infrastructure to move natural gas efficiently and ensure reliable power for end users." The lack of infrastructure puts the Permian Basin at a major disadvantage compared to other oil and gas producing regions, said Jason Jennaro, CEO of FrontierGen, a business analytics company that helps industrial developers secure land.

Further complicating the matter is the number of companies with high energy needs, including cryptocurrency facilities, Jennaro said. The oil and gas industry itself is also increasingly needing more energy. Among the first steps, the region needs gas plants to generate electricity. Longanecker said oil companies are spending billions of dollars in West Texas for such projects. But it won't be so simple as building facilities. More pipelines are also needed. The pipelines carrying 6.5 billion cubic feet a day of gas in the region can only transport so much of it to meet the growing need from customers.

Thailand on track for first decline in LNG imports since 2014

(Reuters; Sept. 23) - Thailand is set for a record decline in electricity output this year as mild weather and a slowing economy are reducing demand, government data shows, putting Southeast Asia's top LNG importer on track for its steepest decline in purchases of the fuel. Power generated and imported to supply the country of over 70 million people fell 5.4% annually in the seven months through July, data showed, nearly twice as steep as the 2.8% slump in January-July 2020 due to coronavirus-linked lockdowns.

An annual decline in output would be only the fourth in the nearly four decades for which official data is available, as fewer days of extreme heat due to frequent rainfall slashed air conditioning use. Raksit Pattanapitoon, analyst at Rystad Energy, said weather is "by far the most significant driver" of power demand in Thailand this year, with all other factors including politics and economic growth lagging "significantly."

Residential power demand — which accounts for 31% of annual consumption — fell over 7% in the seven months through July, the steepest decline on record and far outpacing a 2.8% decline in industrial and commercial demand, which make up over two-thirds of Thailand's annual electricity use, government data showed. Electricity generated from gas, which accounts for 56% of Thailand's power, fell 12% through July, putting it on track for its steepest decline ever and the first drop in annual LNG imports since 2014 — or about 15.3% — government data showed.

Oil-rich Kuwait struggles to generate enough electricity

(Bloomberg columnist; Sept. 23) - The first real boomtown of the 1960s Arab oil rush, Kuwait, has a richer endowment of crude than any other nation on Earth. The 101.5 billion barrels of reserves are equivalent to about 23,000 barrels for every resident — more than double the next-placed country. At current prices, this geological inheritance works out at about $4.3 million per citizen. And yet Kuwait is struggling to keep the lights on. Rolling power outages have become a fact of life over the past two summers.

Electricity was cut to 30 regions in April as temperatures rose and households cranked up the air conditioning. At the peak, about 7.3% of demand went unmet, and the fire service warned people not to use elevators in case they got stuck in apartment blocks that lost power for hours at a time. Factories were ordered to halt all operations between 11 a.m. and 5 p.m., a situation that persisted for five months until the bans were lifted last week. In Kuwait, the biggest factors have been political gridlock, combined with a refusal to stare the reality of the energy transition and a changing climate in the face.

Kuwait had a parliament with a measure of influence until the emir suspended democracy last year. Infighting has been endemic. With 15 different energy ministers over the past decade, decisions on necessary upgrades to creaking infrastructure were deferred until it was too late. Added to that is the wasteful way the country consumes power. Subsidies of $3,200 per person mean electricity bills cover just 5% of grid costs.

Kuwait could afford to be far more ambitious in turning to renewable energy. Roughly 50 gigawatts of solar would be sufficient to meet its electricity demand, equivalent to what China installed in April. It would be cheaper than fossil power, free up more oil and gas for profitable export, and reduce costly liquefied natural gas imports to generate power.

Russia steps up loadings at sanctioned Arctic LNG project

(gCaptain; Sept. 23) - Russia continues to expand its Arctic liquefied natural gas facilities. More than a year after towing the second production line to the Gydan Peninsula, a gas carrier berthed at Train 2 of the Arctic LNG 2 project for the first time. Ice-class carrier Christophe de Margerie, originally built for the neighboring Yamal LNG project, called at the Utrenniy terminal on Sept. 22. The loading signals that Novatek, the plant's majority owner, has overcome initial startup problems resulting in part from the need to replace original gas turbines with an electric drive due to supplier sanctions.

The startup of the second train comes just weeks after Moscow, for the first time, found a buyer for sanctioned LNG cargoes from the plant. For more than a year, up to a million tonnes of supercooled gas remained afloat in the absence of buyers willing to defy U.S. sanctions. In late August LNG carrier Arctic Mulan made the first delivery to PipeChina's Beihai terminal. Five additional offloadings have followed in quick succession, with several more vessels en route.

It is noteworthy that several vessels carrying sanctioned LNG started moving toward China as the Trump-Putin summit in Alaska was unfolding. China's acceptance of LNG from the sanctioned Arctic project sends a political message by signaling a deepening of the country's energy ties with Russia. Despite the successful startup of Train 2, challenges still remain for Russia's flagship LNG project. Both production lines are reportedly only running at half capacity, bringing the plant's maximum production to around 6.6 million tonnes per year. Construction of a third train has been mothballed.

Aborigines lose battle to stop gas project offshore Australia

(The Japan Times; Sept. 21) - Riding along the coast on a small fishing boat, Paulina "Jedda" Puruntatameri gestures to the point where a long, pristine beach curves beyond sight, giving way to an expansive view of the Timor Sea. "This is the home of the sacred sea serpent, Ampiji," says the Aboriginal elder. Her people, the Tiwi, are the traditional owners of a group of islands of the same name that are part of Australia's Northern Territory and lie 50 miles north of Darwin, the territory's capital.

Ampiji, whose home is at Imalu Point on Tiwi's Melville Island, is "the caretaker of this land and sea," says Jedda. It's a role the elder has also embraced. Together with other Tiwi, Jedda has been campaigning for years to stop Australian company Santos and its backers, including Japanese investors, from drilling for natural gas at the Barossa gas field — over 85 miles offshore of Imalu Point — and transporting the gas to Darwin via an undersea pipeline that, at its closest, is less than 4 miles from the Tiwi Islands.

Despite islanders taking Santos to court twice — and winning once — to stop Barossa from going ahead, the plant is nearing completion, with production due to start this year. Barossa is just one of the projects that the Northern Territory is banking on to continue expanding its gas industry. This is despite an assessment by Marcos A. Orellana, the U.N. special rapporteur on toxics and human rights, that oil and gas development “threatens to make Darwin and the region a climate change sacrifice zone.” The Northern Territory also has Australia’s highest proportion of Aboriginal and Torres Strait Islander people, who make up about one-third of the territory’s population of 260,000.

Australia LNG producers willing to accept domestic reservation policy

(Bloomberg; Sept. 22) - Australia’s energy sector largely supports the introduction of a policy that would require producers to reserve a portion of gas for domestic consumption, as the nation seeks to balance a looming local supply crunch with lucrative exports. Santos, Shell and Woodside Energy were among those who made a submission to the Australian government’s Gas Market Review. Stakeholders largely called for a domestic gas reservation policy to be paired with incentives for new supply and infrastructure investment, the government said.

Australia is one of the world’s biggest exporters of liquefied natural gas, shipping about a fifth of global volumes to mainly Asian buyers. However, LNG producers — which earned about A$67 billion ($44 billion) from the trade in the fiscal year through June 2025 — have been criticized for prioritizing more lucrative exports over domestic supply, raising fears of a shortfall in the country’s southeastern population centers.

Santos said it would back a “reasonable” reservation deal for new projects, while Shell said it would support a “well-designed” system if paired with broader regulatory reforms. Woodside called for any policy to be region-specific. Western Australia, which houses four of the nation’s 10 gas export projects, is the only state to have a reservation policy. It requires offshore LNG projects to reserve as much as 15% of their production for local markets, although much less is held back as it is far above the region’s requirements.