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LNG Canada partners give go-ahead to double export capacity

(Bloomberg; Sept. 29) - Shareholders in the Shell-led LNG Canada venture have greenlit plans to double its liquefied natural gas export capacity, forging ahead with the multibillion-dollar investment as key customers in Asia face the biggest supply shock of recent times. The long-awaited decision to proceed with a second phase of the project in Kitimat, British Columbia, will boost capacity to 28 million tonnes a year, Shell said in a statement on Sept. 29. The West Coast plant produced its first LNG in June 2025, and the expansion project is slated to start commercial operations in the early 2030s.

The second phase is expected to draw about US$23 billion of investment, according to the Canadian government. The Iran war and the near-closure of the Strait of Hormuz have created an unprecedented tightening in global energy markets. That's spurred LNG importers to seek out supplies beyond the Middle East. Canadian Prime Minister Mark Carney has pitched the country as a top candidate to step into the breach, having placed the proposed LNG expansion on a list of "nation-building" developments.

The expansion decision underscores Shell's push to grow in LNG as global majors tout the commodity as a key bridge fuel in the energy transition, despite volatile prices over the past few years. Shell holds a 40% stake in LNG Canada, whose location on the country's Pacific Coast gives it an advantage in supplying Asia — home to the world's biggest LNG buyers — without having to navigate shipping chokepoints. Other joint-venture partners include Malaysia's Petronas, PetroChina, Mitsubishi and Korea Gas.

Abu Dhabi's XRG investment unit is exploring the acquisition of a stake in the project and has been holding talks with existing backers including PetroChina about buying some of their ownership stakes in the first phase, Bloomberg reported this month.

Trump claims South Korea will invest in Alaska LNG

(The New York Times; Sept. 30) - The Trump administration said on Sept. 30 that South Korea would invest up to $200 billion in U.S. power projects, including a power plant in Texas, eight nuclear plants and also a liquefied natural gas export project in Alaska. They are part of a slate of projects announced by the White House as it tries to bolster its economic record before the Nov. 3 elections. Alaska is one of several red states that Democrats have targeted to win Senate control, and Democrat Mary Peltola got more votes than Republican Sen. Dan Sullivan in the state's nonpartisan primary last month.

The announcement stemmed from a commitment by South Korea to invest $350 billion in the U.S. as part of a trade deal last year. But many experts have questioned whether South Korea will be able to fulfill that commitment, which would more than triple the country's current investments in the U.S. The South Korean government has said its investments would be based on the economic feasibility of the projects. There are also questions about the viability of the Alaska project — which has been promoted for decades and could cost at least $54 billion — but has not yet been approved by the latest developer.

Trump has repeatedly made exaggerated claims about the amount of foreign investment his industry has brought to the United States. He has said that over $20 trillion of investment is pouring into the country — a total equivalent to more than two-thirds of U.S. gross domestic product. The administration has extracted big investment commitments from countries that are seeking to avoid tariffs, including the European Union and Japan, and some have been moving forward with those investments.

South Korea says Alaska LNG depends on 'commercial viability'

(Associated Press; Sept. 30) - President Donald Trump said South Korea plans to invest about $54 billion in a liquefied natural gas project in Alaska, an announcement he made in the Oval Office on Sept. 30 flanked by a Republican senator who has found himself in a tough reelection race in the state. But while Trump and Alaska Sen. Dan Sullivan — a two-term senator and long-time advocate for the gas project — described it as a fait accompli, South Korean officials were more cautious, saying they needed to assess the project's commercial viability before committing to the investment.

The announcement was the second time in three days that the president used promises of big projects to try to elevate Senate candidates in states where he won comfortably each time he has run — but where Republicans are now in surprisingly competitive races just weeks ahead of the Nov. 3 elections. On Sept. 28, Trump made a similar-styled announcement about a massive steel plant in Iowa. South Korea's participation in the Alaska pipeline and LNG export facility "has not been finalized," said Han Jeoungae, secretary-general of South Korean President Lee Jae Myung's liberal Democratic Party.

She said she believes Trump's comments were "intended to emphasize the U.S. position." She posted on Facebook: "We will decide whether to invest in the Alaska LNG project only after thoroughly reviewing it in accordance with our domestic legal procedures and based on the principle of commercial viability."

Canada ready to flex its energy muscle to go after new markets

(Wall Street Journal; Sept. 28) - Canada wants to become an energy superpower. If it has the will, there is a way. The country is the world's fourth-largest oil producer and fifth-largest natural gas producer. The oil-and-gas sector represents about a fifth of the country's exports, making it the largest contributor, according to Statistics Canada. But it sends nearly all of its natural gas exports and about 90% of crude oil exports to the U.S., limiting its global influence.

President Donald Trump's trade war and the Iran conflict have ignited Canada's ambition to diversify its energy exports. America's push to import more Venezuelan oil, a heavy grade that competes with the Canadian kind, is another reason for Canada to look beyond its neighbor. Asian refiners are among those that might want to diversify their crude sources as a result of the instability in the Middle East. Global refining capacity that can process ultraheavy crude is split roughly evenly between the U.S. Gulf Coast and Asia, according to Jonah Resnick, analyst at Wood Mackenzie.

Canada's energy inertia has been, in part, market driven. Rapid U.S. shale growth had pushed oil prices down and stymied growth plans for Canada's oil sands over the past decade. But policy was also to blame, making it more difficult in Canada to build the infrastructure needed to serve markets other than the U.S. "Previously, infrastructure and resource development had really stalled out due to regulatory and permitting uncertainty," said Robert Kwan, equity analyst at RBC Capital Markets. Today, both of those forces are moving in the other direction.

Gas pipeline capacity will double to serve LNG Canada expansion

(Reuters; Sept. 29) - TC Energy said on Sept. 29 that its Coastal GasLink Phase 2 project will proceed after LNG Canada and its joint-venture partners made a positive final investment decision on the LNG Canada expansion project. The company said Coastal GasLink Phase 2 will nearly double the pipeline's capacity through the addition of new compressor stations and upgrades along its existing 415-mile route linking Dawson Creek, British Columbia, and the LNG Canada export facility in Kitimat, B.C.

Earlier on Sept. 29, LNG Canada partners led by Shell approved a multibillion-dollar Phase 2 expansion of the Kitimat facility that will double its production capacity to 28 million tonnes a year, strengthening Canada's position in the global LNG export market.

City looks to economic boost from LNG Canada expansion

(CBC News; Canada; Sept. 29) - Confirmation that Phase 2 of LNG Canada will proceed is raising hopes for an economic boom in Kitimat, British Columbia, along with calls to ensure the benefits aren't short-lived. The multibillion-dollar capacity expansion could double exports of liquefied natural gas from the coastal facility to overseas markets. The project is expected to create up to 4,000 construction jobs at its peak, along with about 90 permanent positions. "We've all been waiting for it, that's for sure," said Rob Campbell, a Kitimat-based contractor and branch manager with CDN Controls.

The project also has the opportunity to boost the emerging maritime industry in Kitimat, according to Anurag Vinayak with Westward Shipping. He said Phase 1 of the project "got Kitimat onto the marine map and the global energy map." The completion of Phase 2 will see some 450 ships passing through the port every year, meaning the need for more marine infrastructure and support services, he added. "And that is one of the golden opportunities for locals to get into," he said.

Crystal Smith is a former elected chief councillor with the Haisla Nation who now serves on the Indigenous advisory council of Canada’s Major Projects Office. She said along with the direct financial benefits to the First Nation, the project will create "meaningful employment which will hopefully go to lifelong careers" for First Nations people. But she said a key lesson of the project's first phase was the need for more resources to develop skilled trades locally, both now and into the future.

Asset managers deploy insurance cash to finance energy projects

(Reuters; Sept. 29) - Alternative asset managers deploying cash from their insurance arms are reshaping how U.S. energy infrastructure is financed, emerging as major backers of LNG export projects and the pipelines moving crude and natural gas around the country. The influx of cash is dominated by a trio of the finance world's biggest names: Apollo Global Management, Blackstone and KKR.

For the industry, the investments are well timed, as liquefied natural gas developers and pipeline operators face some of their largest capital requirements in years to meet heightened demand for energy exports and power generation to power new artificial intelligence infrastructure. The addition of insurance cash to the funding mix has helped greenlight a raft of new U.S. LNG export facilities that traditionally have to have financing in place before making final investment decisions.

"This is a marriage of assets that has proven over time to be generally lower risk, with capital that wants to invest for the long term in lower-risk assets with steady returns," said Rick Campbell, senior managing director at Blackstone Credit and Insurance. Traditionally, project-finance loans and equity have backed LNG export project development. But since 2025, nearly every major LNG project approved has seen some

combination of infrastructure funds, sovereign wealth investors, private capital or other institutional partners alongside traditional lenders.

China's LNG imports decline in September amid high prices

(Bloomberg; Sept. 29) - China's liquefied natural gas imports are set to decline for a second month as surging prices triggered by the Middle East conflict curb demand. Deliveries are forecast at about 5.3 million tonnes in September, according to projections from Kpler. That would be roughly 8% below a year earlier, based on a comparison with customs data.

Weaker demand from China — the world's top buyer last year — is providing some relief to a tight global market, where prices have climbed to the highest since late 2022 due to the near-closure of the Strait of Hormuz. A colder winter could intensify competition between Europe and Asia for available cargoes, potentially driving prices even higher and adding to inflationary pressures in gas-importing economies.

Chinese buyers have reduced spot-market purchases since the rise in prices made it uneconomical to bring cargoes into the cheaper domestic market. Some importers have instead been reselling long-term contracted supply overseas to lock in a better return. Imports may recover as winter approaches. Beijing is encouraging state-owned buyers to curb resales of the fuel to ensure sufficient supplies when heating demand peaks.

High costs push emerging Asian nations away from LNG

(Bloomberg commentary; Sept. 30) - Emerging Asia is the future of the LNG market — yet one that never seems to show up in present-day reality. For at least a decade, the big growth story for shipped natural gas has focused on a handful of mostly Asian countries whose domestic fields are declining. In its 2017 LNG outlook, Shell called out Thailand, Bangladesh, the Philippines and Vietnam among leading sources of growth.

The same countries loom large in Shell's latest projections, published after the crisis in the Strait of Hormuz jolted the market. South and Southeast Asia will make up about 40% of LNG imports by the middle of this century, Shell said, accounting for more than two-thirds of additional demand beyond current levels. But stung by high costs and supply uncertainty, Asian governments are busy throwing those forecasts on the bonfire.

Thailand is the most prominent example. On paper, it's a paragon of the gas market. Methane still provides almost two-thirds of electricity, a larger share than the U.S. and Russia. In Shell's latest outlook, it's the most exciting prospect in emerging Asia, with LNG imports five times higher in 2040. Bangkok has other ideas. In the government's latest plan, renewable energy will increase to 50% from 20% of the grid in the next

decade, before rising as high as 89% around 2050. Energy Minister Akanat Promphan said the intent is to reduce reliance on “expensive and volatile spot LNG imports.”

It’s far from alone. Look at Bangladesh. “We will no longer be consumers of imported energy. We will be solar power producers,” Prime Minister Tarique Rahman told parliament earlier this month. LNG has never been clean, but these days it’s not cheap, either. At this point, the best argument for LNG in emerging Asia is that it isn’t an energy source at all. Instead, it’s best seen as a raw material for fertilizer and oil refining, and a source of heat for products like glass and ceramics that are hard to electrify.

Competition for LNG between Asia and Europe pushes prices higher

(Australian Financial Review; Sept. 27) - A global tug-of-war for liquefied natural gas cargoes threatens to catapult prices even higher as Europe needs to secure more supplies than usual for the winter and buyers in Asia are willing to pay far more than in the past. The price has already reached multiyear highs, having more than doubled since the start of the U.S.-Iran war. Platts Japan Korea Marker, the Asian benchmark, reached almost $30 per million Btu in mid-September; it was at $25.29 on Sept. 25.

While prices remain far below the peaks reached after Russia’s invasion of Ukraine in 2022, analysts warn that competition for cargoes could escalate in coming months as developing countries in Asia that were priced out of the market during the last crisis are now more willing to pay up to limit damage to their economies. This could push up prices even further for European buyers as the European Union prepares to enter the winter months with the lowest gas stores for at least 15 years.

The willingness of price-sensitive Asian buyers to pay more rather than risk shortages is a “fundamental shift in the gas market,” said Takayuki Ueda, CEO of Japan’s Inpex Corp. “India and Pakistan seem to be very accustomed to price volatility now,” he said. “We have seen both Pakistan and Bangladesh buy multiple LNG cargoes at $25 per million Btu. We didn’t see that in 2022,” said Morgan Stanley analyst Martijn Rats. At such prices, those countries “had already left the market” during the last crisis. “This means that Europe will need to pay even more” this time around, warned Rats.

High prices prevented Europe from refilling gas storage for winter

(Bloomberg; Sept. 29) - For decades, Europe relied on a tried-and-tested way to ensure there’s enough gas to get through winter: Traders bought when the fuel was cheaper in the summer, stored it and then sold at a higher price when needed. But for the second year in a row, the economics of that trade have unraveled. The loss of steady year-round Russian pipeline gas following the war in Ukraine means Europe has become

more reliant on global liquefied natural gas supplies — and fears about a tight LNG market in 2025 made European summer prices more expensive at times.

It has been a similar story this year, made even worse by the Iran conflict that has choked off crucial supplies from the Middle East. The flattening of the summer-winter price spread has made it less feasible for commercial traders to inject gas into Europe's vast storage sites, which encompass depleted fields, aquifers and even old salt caverns. As a result, the continent is heading into the heating season with inventories at their lowest ever for this time of year, raising the risk of bigger price spikes this winter.

The storage predicament is forcing some governments to consider taking a greater role in stockpiles, especially as gas remains a transition fuel in the green shift for years to come, something that could put a further burden on state coffers. While Europe has long had a strategic oil backstop for any crisis, for gas it has largely relied on commercial stocks, which are mainly driven by market prices rather than state intervention. If more supply issues arise or there's a particularly cold winter and stockpiles prove insufficient, Europe may be forced to buy LNG at high prices.

Japan looks to shift away from dependence on Middle East energy

(Bloomberg commentary; Sept. 28) - Among the world's top fuel-consuming nations, Japan is the most energy insecure. Its import-dependency ratios are scary: It buys overseas 99.9% of the oil it needs; 99.7% of the coal; and 97.8% of the natural gas. So Tokyo springs into action after every major energy shock to reassess its supply sources, making it a bellwether of global trends. The direction it's signaling this time? Run away from the Middle East. Where Japan goes, others in Asia would too.

Indeed, South Korea, another major energy importer, has already announced plans to reduce its reliance on the Middle East. India has been less vocal but was trying to diversify even before the war in Iran. Beyond creating a major conundrum for Middle Eastern suppliers, the shift goes against geographic, economic and historic reasoning. The Middle East and Far East are relatively close, so it makes commercial sense — particularly when the cost of shipping is high, as it is now — that oil flows from one region to the other. And so it has done for decades.

But if history is a guide, Japan has shown it can shift its oil consumption when it senses its national security is at stake. In the late 1970s, it consumed over 5.5 million barrels a day, generating more than 60% of its electricity burning crude and fuel oil. Betting heavily on coal, nuclear and liquefied natural gas, it pushed oil out of its power industry almost entirely. By 2025, Japan's oil consumption had fallen to a 55-year low of under 3 million barrels a day. Reducing dependency on the Mideast would be easier if Japanese oil demand drops further. The fewer barrels it needs, the easier it is to shift purchases.

U.S. LNG exporter signs long-term deal with Brazil’s Petrobras

(Reuters; Sept. 29) – U.S. LNG exporter Cheniere Energy said on Sept. 29 its marketing unit has entered into a long-term liquefied natural gas sale and purchase agreement with Petrobras for 22 years. Under the agreement, Brazil-based Petrobras has agreed to purchase approximately 0.8 million tonnes per year of LNG from Cheniere Marketing on a free-on-board basis. Cheniere operates LNG export terminals in Louisiana and Texas, with expansion plans for additional capacity.

LNG developers use long-term contracts with creditworthy buyers to underpin financing and investment decisions for multibillion-dollar export projects. The deal adds to Petrobras' efforts to reduce exposure to volatile spot LNG prices and secure supply flexibility for Brazil's gas and power market. Earlier in February, Cheniere entered a long-term LNG supply deal with Taiwan's CPC Corp., under which CPC will purchase up to 1.2 million tonnes of LNG per year from 2026 through 2050.

British Columbia LNG project signs up another customer

(The Canadian Press; Sept. 30) - Ksi Lisims LNG has signed a long-term supply deal with Centrica Energy for its proposed liquefied natural gas export facility. Under the agreement, the parent company behind British Gas will buy one million tonnes of LNG per year for 20 years. Ksi Lisims LNG, estimated at C$9 billion, has proposed a floating export facility located on the northwest coast of British Columbia, with capacity for 12 million tonnes of LNG per year. With the Centrica commitment, the company says it has signed agreements covering nine million tonnes per year of its planned capacity.

Houston-based Western LNG is the lead developer and future operator of Ksi Lisims alongside Rockies LNG, a consortium of Canadian natural gas producers, and the Nisga’a Nation, on whose lands the project is planned. First shipments from the project, which is still subject to a final investment decision, are expected in the early 2030s.

LNG project in line for larger property tax break in Louisiana

(Louisiana Illuminator; Sept. 28) - A company that’s expanding its liquefied natural gas facility in Cameron Parish is one step away from getting a $138 million break on its local property taxes. The Louisiana Board of Commerce and Industry, whose members are appointed by the governor, approved Cheniere Energy’s “mega-project” status application on Sept. 23 for its $6 billion plan to expand the Sabine Pass liquefied natural gas export facility, where the fuel is converted for shipping overseas.

If Gov. Jeff Landry gives his approval, the company will be exempt from paying 93% of its property taxes over at least the next five years. With the increased exemption,

Cheniere would pay $10.5 million a year in property taxes instead of $29.8 million, according to Louisiana Economic Development calculations. Without any exemption, the company would have owed closer to $150 million per year.

The mega-project incentive has been part of the Industrial Tax Exemption Program since 2016, when former Gov. John Bel Edwards made substantial changes to one of the state's most lucrative business incentive programs. Landry has undone most of that policy, but retained the mega-project designation with some changes. For an investment to receive that distinction, a company must spend more than $500 million in Louisiana or exceed 200% of the average business investment in the parish over 10 years. An applicant can ask for a waiver of between 93% and 100% of their local property taxes.

Saudi Arabia repairs, restarts East-West oil pipeline

(Wall Street Journal; Sept. 28) - Saudi Arabia has resumed exporting oil via its East-West pipeline after repairing damage caused by drone strikes, people familiar with the matter said on Sept. 28, restoring a crucial route around the Strait of Hormuz and dealing a blow to Iran. Stretching 750 miles across Saudi Arabia to the Red Sea port of Yanbu from the kingdom's oil-producing heartland on the Persian Gulf, the pipeline has become one of the world's most important pieces of energy infrastructure during the Iran war, serving as a workaround for sharply curtailed tanker traffic through Hormuz.

The East-West pipeline can carry up to 7 million barrels a day — about 2 million for domestic refiners and the rest for export — but had never operated at full capacity for an extended period before the Iran war began on Feb. 28. Roughly 4 million barrels a day — around 4% of global supply — were flowing through it before drone strikes blamed on Iran-backed forces damaged the pipeline on Sept. 10, analysts estimate.

The resumption of East-West pipeline exports comes as Saudi Arabia has also figured out how to get more oil past Iran through the Strait of Hormuz. Loadings at Saudi Arabia's Gulf port at Ras Tanura recently surged to 6.5 million barrels a day from 1.5 million in early September, ship tracker Kpler said. Oil traders are watching to see whether Saudi Arabia can maintain high volumes through Hormuz while also resuming shipping from Yanbu, said Hamad Hussain, a senior economist at Capital Economics.

Middle East oil flows move closer to pre-war levels

(Bloomberg; Sept. 30) - Crude oil flows from the Middle East are returning toward pre-war levels despite continued risks to shipping, according to separate estimates from JPMorgan Chase and Goldman Sachs. "The Middle East's oil export arteries are flowing again," JPMorgan analysts including Natasha Kaneva said in a Sept. 29 note. That's "a remarkable recovery for a region still at war," although it's been uneven, they said.

Shipments of crude oil have rebounded to 17.5 million barrels a day, or 98% of pre-war levels, while flows of products such as diesel and gasoline were at 3 million barrels a day, or 58%, according to JPMorgan. The global oil market is zeroed in on the volumes of oil and products coming out of the region as the conflict between the U.S. and Iran enters its eighth month. In addition to shipments going via the Strait of Hormuz, Saudi Arabia has managed to restore about half the flows on its East-West pipeline after damage earlier this month to the cross-country conduit, which feeds its Red Sea ports.

Flows through Hormuz have almost “returned to late-June highs of nearly 13 million barrels a day, led primarily by Saudi Arabia,” JPMorgan said. “But higher crossings should not be mistaken for improved safety — rather, they reflect the industry’s increasing ability to operate under sustained risk,” the bank said.

Big Oil needs to figure out how it will navigate new energy world

(Reuters commentary; Sept. 27) - The world's biggest energy companies are poised to deliver another quarter of bumper profits, fueled by record refining margins. Flush with cash, Big Oil now needs to chart a course for future growth in a world reshaped by the Middle East crisis. Big Oil has seen its cash coffers balloon this year. Yet since the start of the Iran war in February, oil majors have largely reacted cautiously to this windfall, directing billions to debt reduction rather than major new investments.

That approach made sense in the early months of the conflict, when energy markets were swinging wildly on every headline and investors largely accepted President Donald Trump's prediction that the war would be short-lived. Seven months later, the industry finds itself facing a very different reality. What began as a confrontation between the U.S., Israel and Iran has evolved into a protracted regional conflict characterized by attacks on energy infrastructure, refineries and shipping lanes. Many of the consequences for global energy markets are likely to linger long after the war ends.

That changes the calculus for an industry that makes multibillion-dollar investments with time horizons measured in decades. The industry can no longer afford to sit on its cash. For now, investors still welcome greater returns in dividends and share repurchases but, over time, Big Oil will need to put forward a vision for how it will navigate this altered environment. The winners of the next decade will not be the companies that merely harvest today's windfall profits. They will be those that use them to prepare for a world of higher geopolitical risk, longer supply chains and a global push for energy security.

Brazil takes on more importance as growing oil supplier

(Argus; Sept. 28) - President Donald Trump claimed this week that "the biggest oil companies in the world are going in" to Venezuela, but leading private-sector firms

continue to see Brazil as their prime opportunity. The country's abundant deepwater resources, stable regulatory environment and favorable geography make it an attractive investment destination for leading international oil companies, as wars and uncertainty continue to rattle global oil markets.

Executives at this week's ROG.e conference in Rio de Janeiro were only too eager to talk up Brazil's advantages. Shell is the biggest private-sector producer in Brazil, with equity output of about 500,000 barrels per day. CEO Wael Sawan said disruption from the Russia-Ukraine and U.S.-Iran wars present a "multi-month challenge to supplies" globally, but he sees Brazil as a winner. "Brazil has the optionality and flexibility to not just support Brazilians but also support the rest of the world in the export of energy."

Led by state-controlled Petrobras, Brazil's upstream producers pushed crude output to a record 4.5 million barrels per day in July, according to hydrocarbon regulator ANP. The country has redirected crude exports to new Asian markets this year, driven by reduced demand from China, and to Europe thanks in part to a 50% cut to a temporary 12% crude export tax under an agreement between the European Union and Mercosur (South American) trade bloc. "I was quite happy to have big production in Brazil to fill my European refineries," TotalEnergies CEO Patrick Pouyanne said.

Venezuela scrambles to find golf clubs for oil conference players

(Bloomberg; Sept. 28) - Dozens of executives teed up at the lush Caracas Country Club for a golf tournament on Sept. 28, warming up for a sold-out oil and gas conference in the Venezuelan capital this week. Days earlier, the event organizers were in a panic. "We contacted every golf club and shop to find clubs," said Alex Moulds of London-based Global Event Partners. "We borrowed some sets and even bought a few to make sure we had enough."

For ordinary Venezuelans, a rush in the capital's wealthy bubble to secure golf clubs is an almost absurd problem — they've faced years of economic contraction, hyperinflation and sanctions that have impoverished the oil-rich country. The country is also recovering from twin earthquakes in June that killed thousands. Yet the conference fits with President Donald Trump's promise to restore Venezuela's former glory under an umbrella of U.S. influence. Trump, a regular golfer, owns multiple international courses.

Some 650 foreign and local executives, government officials and foreign diplomats are due to attend the Venezuela International Oil and Gas Summit starting Sept. 29, with over 150 more on the waiting list. The stampede illustrates how Venezuela is captivating the hydrocarbons industry at a time when Middle East supplies are choked by war. That level of attendance put a premium on locating enough golf clubs for participants.