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June 24, 2025

The Honorable Brett Guthrie
Chairman
Committee on Energy and Commerce
U.S. House of Representatives
Washington, DC 20515

The Honorable Frank Pallone
Ranking Member
Committee on Energy and Commerce
U.S. House of Representatives
Washington, DC 20515

Re: H.R. 1949, the “Unlocking our Domestic LNG Potential Act of 2025” is Inconsistent with President Trump’s Pledge to Put America First

Dear Chairman Guthrie and Ranking Member Pallone:

On behalf of the Industrial Energy Consumers of America (IECA) we oppose H.R. 1949, the “Unlocking our Domestic LNG Potential Act of 2025.” The bill prioritizes LNG exports over U.S. consumers by removing long standing Natural Gas Act consumer protections. We urge Republicans to not vote for this bill which could directly impact manufacturing competitiveness and the 13 million jobs we employ. The stakes are high. For every one dollar increase in the Henry Hub natural gas price, consumers pay on average \$34 billion more for natural gas and \$20 billion more for electricity, or \$54 billion annually.¹ One hundred percent of our member companies are from the manufacturing sector and are price sensitive.

The U.S. Department of Energy (DOE) has already approved a significant volume equal to 48 Bcf/d for shipment to NFTA countries, which equals 51 percent of 2024 net supply.² Only 15 Bcf/d is operating. Why then is it in the public interest for Congress to remove consumer protections? This is not a national security issue. What is approved is far more than enough to supply our allies.

States that Should Vote Against H.R. 1949

The most vulnerable are large natural gas consuming states that do not produce much natural gas. These states should not support H.R. 1949 which includes Georgia, Florida, Michigan, North Carolina, Indiana, Tennessee, South Carolina, Iowa, California, New Jersey, New York, Virginia, Oregon, and Alabama.

¹ Natural Gas, U.S. Energy Information Administration (EIA), <https://www.eia.gov/naturalgas/>

² Summary of LNG Export Applications of the Lower 48 States, U.S. Department of Energy, <https://www.energy.gov/fecm/articles/summary-lng-export-applications-lower-48-states>

U.S. Energy Information Administration (EIA) data proves that LNG export volumes are highest during our winter peak heating season months of November through March, which accelerates a reduction in U.S. inventory, increasing the prices of U.S. natural gas and electricity and reducing reliability. The severity of the problem increases as export capacity increases (see Figures 4-5).

LNG customers are countries who are insensitive to price and will pay any price to keep the lights on in their country. No matter how high U.S. prices will go, they will buy away our natural gas even when our winter inventories fall and prices rise. The LNG 20-year contracts shift supply and price risk from LNG buying countries to U.S. consumers and the economy. No U.S. entity has 20-year contracts, not even electric utilities.

We urge you to vote against H.R. 1949 and preserve consumer protections.

Sincerely,

Paul N. Cicio
Paul N. Cicio
President & CEO

cc: U.S. House

The Industrial Energy Consumers of America is a nonpartisan association of leading manufacturing companies with \$1.3 trillion in annual sales, over 12,000 facilities nationwide, and with more than 1.9 million employees. One hundred percent of IECA members are manufacturing companies whose competitiveness is largely determined by the cost and reliability of natural gas and electricity. IECA's sole mission is to reduce and avoid energy costs and increase energy reliability through advocacy in Congress and regulatory agencies, such as the Federal Energy Regulatory Commission (FERC). IECA membership represents a diverse set of industries including chemicals, plastics, steel, iron ore, aluminum, paper, food processing, fertilizer, insulation, glass, industrial gases, pharmaceutical, consumer goods, building products, automotive, independent oil refining, and cement.

Figure 1

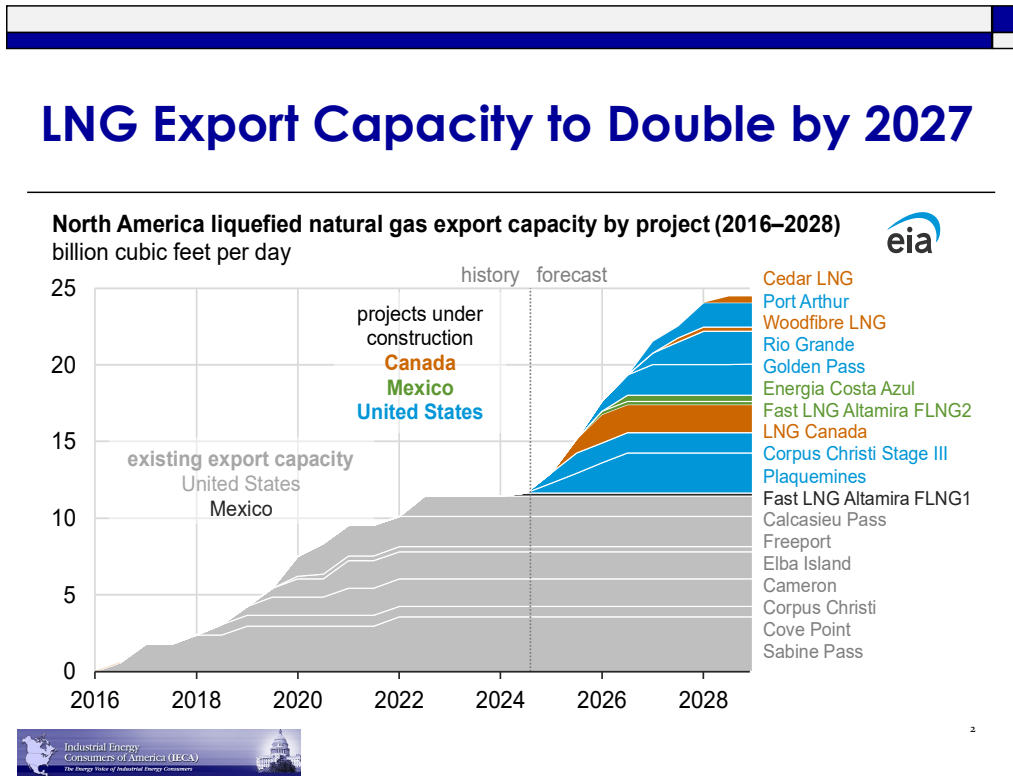


Figure 2

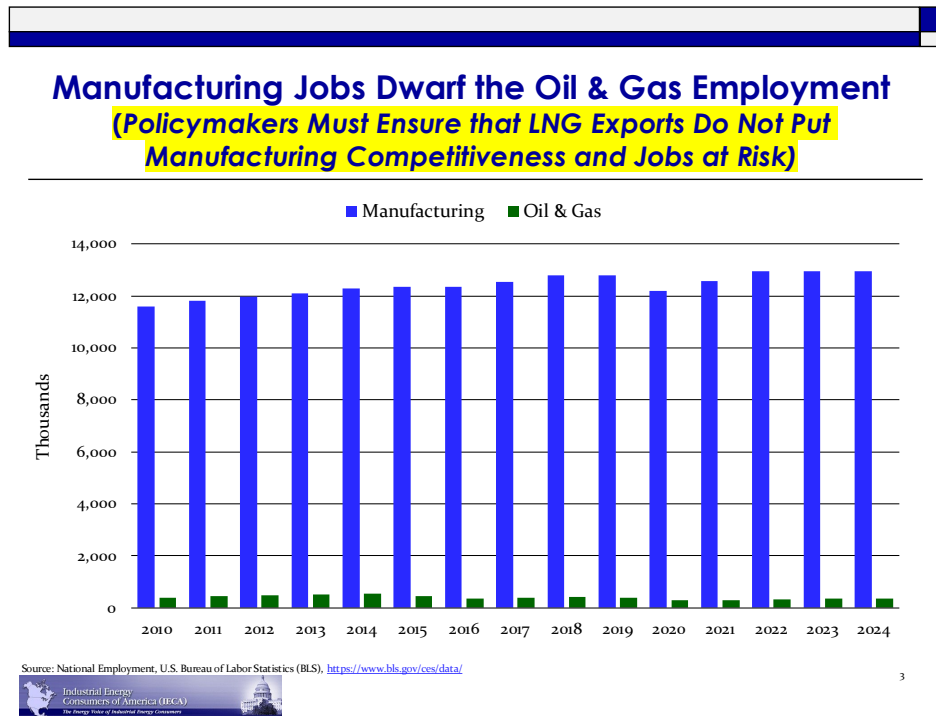


Figure 3

Seasonality Plays a Far Bigger Role in Natural Gas than Oil Products (EIA)

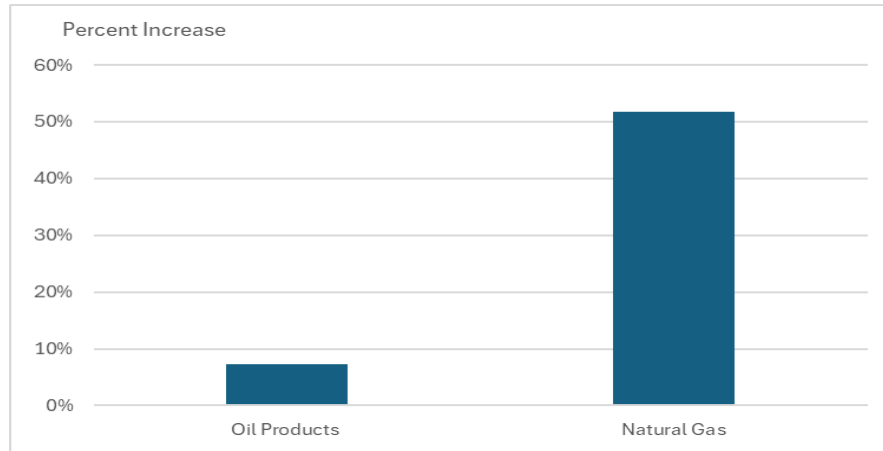


Figure 4

LNG Exports are Highest During Winter Months Which Increases Natural Gas and Electricity Prices (EIA)

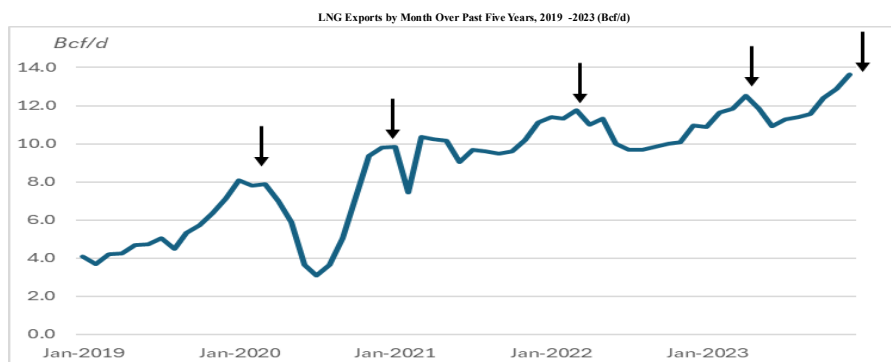


Figure 5

Already Approved LNG Exports Lift Peak Winter Demand 34% Above Current Records

