

Nickalus Holmes

From: Nickalus Holmes on behalf of Records Clerk
Sent: Monday, October 20, 2025 8:21 AM
To: 'Robert Trento'
Cc: Consumer Contact
Subject: RE: Who's Afraid of American LNG? WSJ

Good Morning

We will be placing your comments below in consumer correspondence in Docket No. 20250011, and forwarding them to the Office of Consumer Assistance.

Thank you,
Nick Holmes
Commission Deputy Clerk II
Office of Commission Clerk
Florida Public Service Commission
850-413-6770

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Subject: Who's Afraid of American LNG? WSJ

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FYI: World has over supply LNG more coming on line, western Nations looking to reduce dependence on Russian Oil, LNG.

Why is FL installing thousands of Sqr Miles, CCP manufactured, thin wafer solar panels & batteries, that produce energy at 4x cost of LNF 8X COST, clean coal!!!!!!!!!!!!!! While FPL proposes +\$9Billion price increase SWFL residents!!

Please advise what you plan on doing to eliminate CCP Solar/Battery power an taking advantage of long term glut/OverProduction of LNG!!!!!!!!!!!!!!

FL must work to achieve lowest cost energy possible delivered most efficient way possible to support business expansion in the state, provide highest possible disposable income for residents. Cost of energy drives the FL economy, improves standard of living, expands employment!!!!!!!!!!

Have written repeatedly requesting action on a more sensible plan to delivery cost effective, reliable energy!!!!

Please Advise
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Who's Afraid of American LNG? WSJ

As Russia steps up its liquefied natural gas exports, recent news stories warn that *fast-growing U.S. supply could create a global "glut." Most countries are eager for more American LNG. Not so Vladimir Putin and a Western European energy giant, which could be hurt by the competition and lower prices.*

"US rush to expand LNG exports heightens fears of global gas glut," said a recent Financial Times headline. Other publications have echoed such "fears" and cite TotalEnergies CEO Patrick Pouyanné. "We are building too much," the French executive said at a gas conference last month in Milan. By "we," he meant the U.S.

Mr. Pouyanné added that *"we are facing many U.S. projects," which will result in an "oversupply."* If the CEO is truly worried, he'd scrap TotalEnergies' massive planned Mozambique LNG project or pull out of the company's two Russian projects, which help fund Mr. Putin's war machine. TotalEnergies owns a stake in Russia's Arctic LNG2 plant, which has been ramping up exports to China.

Warnings about "gluts" also ignore market realities. U.S. LNG projects require long-term contracts with customers to secure financing from banks and investors. That means market demand is guaranteed for projects before they break ground. *LNG export capacity is expected to grow by 9.7 billion cubic feet per day by 2028, which is only about half as much as global demand is forecast to grow.*

Global LNG demand is soaring as countries shift to gas power from coal. India plans to increase LNG imports by four-fold by 2030. The AI boom is also driving demand for more gas plants, which can provide reliable power around the clock. Gas plants are also less expensive and quicker

Total, the French energy giant, wants the U.S. to stop producing so much. to build than nuclear power.

Meantime, Europe to its credit is trying to wean itself off Russian gas. The European Union has ended most Russian gas imports by pipeline. But France, Spain and Belgium still import large amounts of Russian LNG, and Europe is Russia's largest customer. Russian LNG last year accounted for nearly 20% of Europe's gas imports.

The European Commission last month proposed banning Russian LNG imports by 2027 on the expectation that increased U.S. LNG will be available to replace it. Russia might then try to sell more LNG to India and China as it has with oil, but increased U.S. LNG exports will reduce global prices.

That would hurt Mr. Putin while helping Europe and other U.S. allies. High gas prices have hurt Europe's economy and manufacturing. As for Mr. Pouyanné, he may worry that lower prices will dent his company's profits. Note that the *U.S. Export-Import Bank this year agreed to provide \$4.7 billion in financing for TotalEnergies' Mozambique project.*

Why is the Trump Administration assisting a company that is undermining American LNG exports and helping Mr. Putin?