

U.S. LNG Exports to Ukraine Advance America's Energy Dominance

By **Oleksiy Riabchyn**

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Congress has handed the Trump administration a powerful new tool to advance its energy dominance agenda—and Ukraine is ready to help deploy it. The Fiscal Year 2026 National Defense Authorization Bill (NDAA), passed in December 2025, **dramatically expands the capacity of the U.S. International Development Finance Corporation (DFC)** to finance energy exports, increasing lending authority from \$60 billion to \$205 billion and authorizing partnerships with state-owned enterprises in strategically vital nations. The timing couldn't be better.

Since early October 2025, Russia has systematically **destroyed Ukraine's gas production infrastructure** with waves of missiles and drones, targeting civilian facilities essential to heating homes through winter. These attacks have sharply curtailed domestic production, forcing Ukraine to import unprecedented gas volumes. As Naftogaz CEO Sergii Koretskyi noted after one of the worst assaults, the strikes had “no military rationale” and were aimed squarely at civilian life.

This crisis creates a strategic opening for Washington. By leveraging newly expanded DFC and Export-Import Bank (EXIM) authorities to finance large-scale U.S. LNG sales to Ukraine, Europe gains access to stable, rules-based supply that reinforces diversification away from Russian gas while strengthening long-term market stability. These are commercial transactions, not emergency aid, and they enhance Europe's resilience while supporting transatlantic energy integration. This isn't foreign aid—it's strategic commerce that advances core U.S. interests.

The U.S. is now the **world's largest LNG exporter**, with thriving production across key energy states. Each cargo sent to Europe bolsters domestic production, **creates jobs**, and drives port infrastructure investments. The Trump administration **has articulated a clear vision** of “American energy dominance.” Ukraine shares that vision and is ready to help make it reality by purchasing significant quantities of U.S. LNG, integrating its infrastructure into the broader European gas network, and transforming Ukraine into a major hub for American energy.

Naftogaz, working with Polish ORLEN, has already **begun importing U.S.-sourced LNG**, with larger volumes planned for 2026. These deals add non-Russian supply into Central and Eastern European markets, strengthen regional liquidity, and reinforce cross-border energy solidarity— exactly the kind of long-term, demand-backed export relationships America needs and Ukraine can help secure. Scaling these flows, however, requires additional financing capacity.

The NDAA reforms address any concerns about risk by explicitly authorizing DFC to provide subordinate

debt and 100% loan guarantees, giving financial institutions the tools needed to support large-scale energy infrastructure in complex environments. European institutions—including the European Bank for Reconstruction and Development and the European Investment Bank—have already demonstrated confidence by **extending crucial financing** to Naftogaz. Norway has **provided targeted grants** to strengthen Ukraine's energy sector. Poland's ORLEN and **Greece's DEPA have stepped up** with direct gas sales already reaching Ukrainian consumers. If European taxpayers are willing to back these investments, American financial institutions—now armed with stronger tools—should expand the pool of capital available to secure America's energy dominance throughout the Continent.

But while Washington debates, competitors such as Qatar are **negotiating long-term contracts** that will shape Europe's gas market well into the 2040s. U.S. LNG, supported by modernized financing tools, offers Europe a flexible, transparent alternative aligned with transatlantic strategic interests. With the authorities Congress has now provided and the right executive leadership, EXIM Bank and DFC can become force multipliers for an American LNG export surge to Europe.

The opportunity is clear. Ukraine is ready to buy. America's energy industry is ready to sell. Congress has delivered the tools. Ukraine, with the largest natural gas infrastructure in Europe, is the logical secure hub for American LNG—redistributing it across the continent and providing seasonal flexibility that strengthens European resilience and expands long-term demand for U.S. exports.

If the Trump administration leverages the newly enhanced EXIM Bank and DFC authorities to facilitate large-scale LNG deliveries to and through Ukraine, it can achieve what no prior administration has done: economic growth at home, strategic dominance abroad, and the permanent exclusion of Russian energy from Europe—without sacrificing American interests. This creates a Europe less exposed to coercion and better positioned for long-term stability.

For Ukraine and Europe, this is what true American energy dominance and effective transatlantic energy partnership looks like.

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