



EU-US trade deal explained - energy aspects

Brussels, 30 July 2025

EU energy imports from the US

The US already is one of the EU's top energy partners and, by far, the **EU's first supplier of LNG**, with 55% of our LNG supply coming from the US so far in 2025. The US is also the **EU's first oil supplier** (17% of all EU imports in 2024), and a **key supplier of nuclear fuel and fuel services**, with US exports to the EU worth around €700 million in 2024.

The **EU's total LNG import capacity** now amounts to around 250 billion cubic metres per year, more than double the current annual LNG imports. Notably, **between 2022 and 2024, a record 12 new LNG terminals and 6 expansion projects** were commissioned across the EU, adding **70 billion cubic metres of import capacity**. For context, the EU has imported around 50 billion cubic metres of LNG annually from the US in recent years.

Currently, 12 Member States* possess the necessary infrastructure to import LNG. The EU has ample spare capacity to accommodate additional LNG imports, including from the U.S., to replace Russian gas imports.

What does the EU-US trade deal foresee for energy?

The political agreement between the EU and the US will further **increase cooperation on ensuring secure energy supplies**.

The agreement between the EU and the US includes the intention to procure more US liquified natural gas (LNG), oil, and nuclear fuels and cutting-edge technologies and investments over the next three years until the end of 2028. With an expected offtake valued at around \$750 billion (ca. €700 billion) over this entire period, the agreement will contribute to implementing our [REPowerEU Plan](#) and [Roadmap](#) to fully replace all Russian energy imports.

The estimates reflect the **strength of our energy partnership with the US**, which has become the EU's primary supplier of both oil and LNG. It also builds on extensive work with EU Member States, industry and other stakeholders to identify the energy needs to ensure the **EU's full energy independence from Russia, Europe's energy security and lower prices for citizens and businesses**.

Since the adoption of the [Affordable Energy Action Plan](#) in February 2025, the Commission has been intensively working with US suppliers of LNG. With this preparatory work, the Commission is ready to organise a dedicated process – AggregateEU – to collect demand from EU entities and match it with competitive US LNG supplies for the period 2025 until 2050.

AggregateEU is the Commission's flagship initiative for demand aggregation and coordinated gas purchasing at the European level as part of the [EU Energy Platform](#), launched in April 2023, to make the **EU's energy supply more diverse, secure and coordinated**.

While the Commission facilitates contacts between relevant EU buyers and sellers, **commercial decisions naturally belong to companies**. At the same time, the US will have to support these purchases by ensuring unrestricted access and sufficient production and export capacity.

Diving into the numbers

The figure of \$250 billion for per year over the next 3 years is the estimated average of **overall EU**

energy imports from the US based on a thorough and robust assessment, which took the following into account:

- **Current import volumes of US LNG, oil, nuclear fuel and fuel services in the EU**, which already amount to around \$90-100 billion per year. In parallel, we continue to diversify energy sources and invest in the clean energy transition over the longer term.
- **Estimated additional volumes of oil, gas and nuclear fuels**, including as part of the move away from Russian fossil fuel. In 2024, the EU still imported about €22 billion of fossil fuels from Russia and about €700 million worth of nuclear supplies.
- **Key US energy technology investments, services and exports into the EU**, notably in the nuclear sector for conventional and Small Modular Reactors (SMRs), where we already have clear indications where U.S. companies are involved.

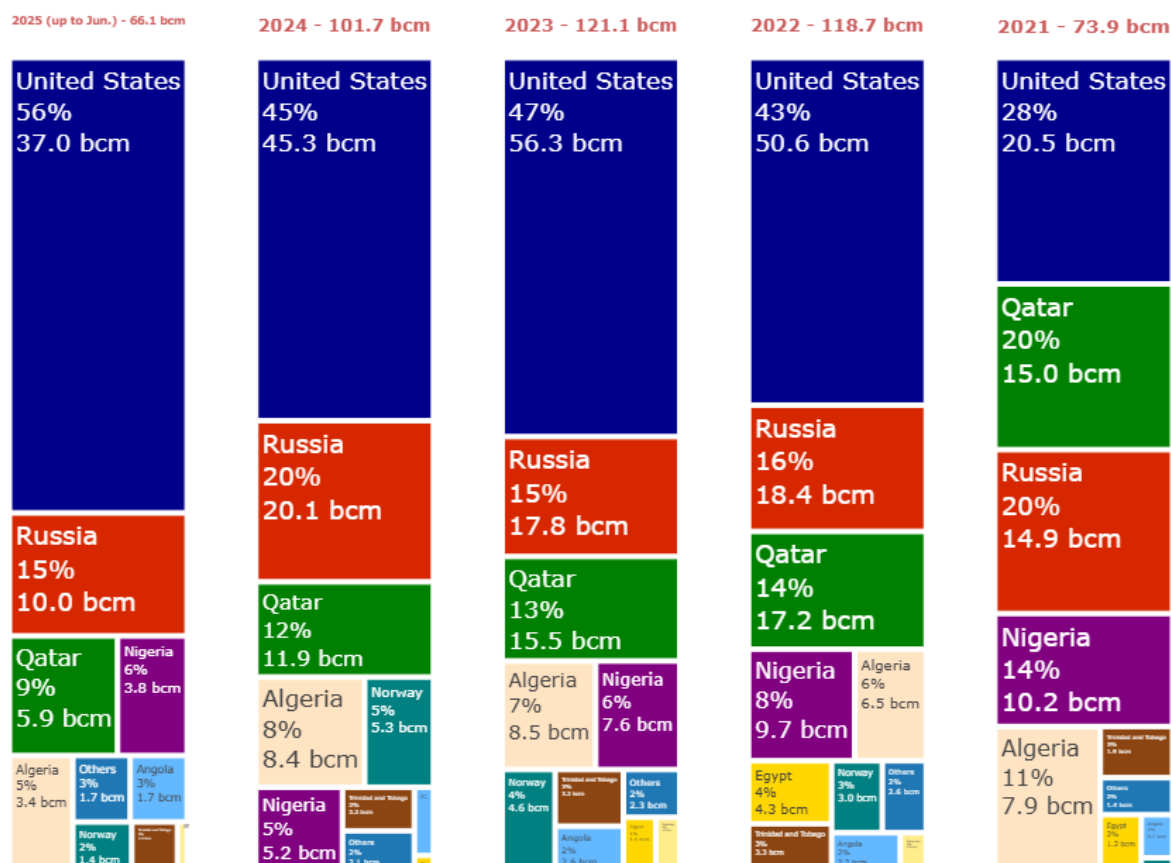
While solid projections have been developed, the final volumes and breakdown between oil, LNG and nuclear fuel and fuel services will depend on different factors, including commodity prices, exchange rates, FID decisions taken by project promoters, etc. These will be determined by commercial transactions.

Remaining committed to EU's decarbonisation goals

The **EU-US trade deal does not undermine EU's determination to decarbonise** our economies within a clear timeframe. While the deal involves an increase in energy imports from the U.S. over the next 3 years, it is fully compatible with our medium- and long-term policy to diversify our energy sources and to implement the REPowerEU Roadmap so that we fully phase out Russian energy imports as soon as possible.

The **EU remains fully committed to achieving climate-neutrality by 2050** – the core objective of the European Green Deal. The European Commission just proposed an updated Climate Law with an ambitious 90% greenhouse gas emissions reduction target for 2040.

Gross imports of LNG in the EU (bcm)



Source: European Commission.

(*) : Belgium, Germany, Spain, Finland, France, Greece, Italy, Lithuania, Malta, the Netherlands, Poland and Portugal.

For More Information

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