LNG AND STRATEGIC DIPLOMACY BETWEEN THE U.S. - JAPAN: PAST, PRESENT, AND FUTURE

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Abstract

The diplomatic relationship between the United States (US) and Japan has been one of the most stable and enduring in the post-World War II period. The two countries have maintained close ties for nearly seven decades in the domains of security, trade, science and technology, and culture. This trust-based relationship also extends to the energy domain and has been solidified through mutual efforts due to energy security concerns. The liquefied natural gas (LNG) cooperation has become an important facet of US-Japan energy diplomacy. The US is the world's preeminent LNG exporter, while Japan is among the largest LNG importers that will continue to rely on LNG for its energy supply for the foreseeable future. In this chapter, we first identify the key actors in the energy industry and policy landscapes in the US and Japan. Then, we examine US-Japan energy diplomacy in a historical context, with a particular emphasis on the role of LNG in both countries' energy strategies. The fourth section analyzes how US-Japan LNG cooperation has responded to two recent events of global significance: the 2022 Russian invasion of Ukraine and the re-election of Donald Trump as the 47th US president. The last section concludes with an outlook for the future of US-Japan LNG cooperation in the short- to medium-term.

Keywords
US, Japan, LNG, Cooperation, Diplomacy

Introduction

The diplomatic relationship between the United States and Japan has been one of the most stable and enduring in the post-World War II period. The two countries have maintained close ties for nearly seven decades in the domains of security, trade, science and technology, and culture. This trust-based relationship also extends to the energy domain, initially established based on nuclear energy cooperation and mutual efforts to bolster energy security in the aftermath of the 1970s oil shocks.

More recently, the issue of liquefied natural gas (LNG) cooperation has become an important facet of US-Japan energy diplomacy. On this front, the US and Japan find themselves in fundamentally opposite positions that produce a mutual interest in cooperation. The US is the world's preeminent LNG exporter, while Japan is among the largest LNG importers that will continue to rely on LNG for its energy supply for the foreseeable future. While LNG trade between the US and Japan has historically been limited due to geographic and market constraints, this confluence of interests is likely to increase US LNG exports to Japan in the years to come.

In this chapter, we first identify the key actors in the energy industry and policy landscapes in the US and Japan. Then, we examine US-Japan energy diplomacy in a historical context, with a particular emphasis on the role of LNG in both countries' energy strategies. The fourth section analyzes how US-Japan LNG cooperation has responded to two recent events of global significance: Russia's invasion of Ukraine and the re-election of Donald Trump as the 47th US president. The last section concludes with an outlook for the future of US-Japan LNG cooperation in the short- to medium-term.

Key Actors in the US and Japanese Energy Regimes

The US energy regime is composed of federal and state government entities, utility regulatory bodies, and private-sector energy companies. Among them, federal agencies have the most direct impact on energy policy. The Department of Energy (DOE), for example, oversees national energy policy and energy production, including the power to authorize LNG imports and exports. The Federal Energy Regulatory Commission (FERC) regulates the interstate transmission and wholesale sale of electricity and natural gas, as well as the prices of interstate pipeline transport of petroleum. FERC also reviews proposals by companies to build interstate natural gas pipelines, gas storage projects, and LNG terminals. The Environmental Protection Agency sets rules related to the environment, with varying implications for the energy sector.

Overseeing these agencies are the executive and legislative branches of the federal government. The legislative branch has sway over energy policy through the laws it enacts, while the executive branch exerts influence via the executive actions that the US president signs and through the power to appoint heads of agencies.

A unique feature of US politics is that state governments can greatly shape or thwart national-level policy developments and outcomes. Energy policy is no exception. Although subordinate to federal offices, each state's public utility commission, environmental agency, and energy departments play an important role in determining that state's energy and environmental policies.

In the private sector, the main oil and gas producers are Cheniere Energy Inc., which is the largest LNG producer in the US, ExxonMobil, ConocoPhillips, Chevron, and Total Energies. The key industrial associations involved in LNG production and promotion include the American Petroleum Institute (API) and the US Chamber of Commerce.

Scholars of Japanese politics have identified an "iron triangle" in a range of policy areas. In energy policy, the triangle is made up of the government bureaucracy and its affiliated organizations, the ruling Liberal Democratic Party (LDP), and incumbent energy industry companies (Moe, 2011). Key among the government bureaucracy is the Ministry of Economy, Trade and Industry (METI) which plays an outsized role in shaping energy-related legislation and implementing specific rules regulating the energy industry. A central office within METI, the Agency for Natural Resources and Energy (ANRE), favors large incumbent energy-related companies and, given METI's wide-ranging policy portfolio, shapes policies in ways that benefit Japanese firms in fossil fuel value chains by either bolstering their competitiveness or minimizing disruptions to their business models.

State-owned enterprises closely affiliated with METI ensure that Japanese firms have stakes in a wide network of projects related to oil, gas, and LNG across the world. The Japan Oil, Gas and Metals and Energy Security (JOGMEC), for example, supports upstream oil and gas exploration and extraction. The Japan International Cooperation Agency (JICA) provides overseas development aid for infrastructural projects, including energy-related ones. The Japan Bank for International Cooperation (JBIC) supports private financial institutions' investments in strategically important natural resources abroad, and the Nippon Export and Investment Insurance (NEXI) is a state-owned insurance company that insures private-sector investments in overseas projects.

The second group of actors in the iron triangle are the leaders of the Liberal Democratic Party (LDP), which historically held a dominant position in the legislature in Japan. The catch-all conservative LDP has held very close ties with both the bureaucracy, energy utilities, and other energy-related corporations. Except for a handful of years when the LDP lost its majority, it has appointed its senior members to head METI and offered major policy concessions to the utilities (Moe, 2011).

The third corner of Japan's iron triangle is occupied by industry players. While the government supports the energy industry, it is ultimately the domain of private-sector companies that develop energy projects, procure fuels from abroad, and generate power across the country. Energy-related companies have a significant say over Japan's energy policy, with the ten regional electric utilities being among the most influential. Virtually all of Japan's regional and national business federations have CEOs of electric utilities as their chairs and board members. This is true of the Japan Business Federation (*Keidanren*), the peak association of companies representing every sector in Japan that holds significant political sway. Electric and gas utilities are some of the largest LNG purchasers in the world.

US-Japan Energy Diplomacy in Historical Context

Concerns over energy security lie at the roots of US-Japan energy cooperation. This cooperation took both multilateral and bilateral forms. The tripling of oil prices after the first oil shock in 1973 prompted the US to establish the International Energy Agency (IEA), an intergovernmental organization whose original mission was to promote and coordinate oil sharing among its members in the event of a critical supply disruption. Japan strongly supported this initiative, becoming one of the founding members of the IEA. Efforts led by the US and Japan to contain the rise of oil prices continued well into the 1980s, culminating in the IEA's policy to require member countries to hold oil stocks. The leadership of Ronald Reagan in the US and Yasuhiro Nakasone in Japan strengthened the two countries' bilateral ties, resulting in the Reagan-Nakasone agreement of November 1983 during the US President's visit to Japan that emphasized the importance of unrestricted trade in oil, gas, and coal (IEA, 2024; Martin, 2020).

Another principle underpinning US-Japan energy ties was and continues to be the safe promotion of nuclear energy. The 1955 US-Japan Nuclear Research Agreement was the first nuclear agreement between the two nations, followed by US exports of nuclear fuel, equipment, and technology to Japan and Japanese investments in US nuclear research and development. As the first wave of commercial nuclear reactors came online in the 1960s and 1970s, an agreement on the peaceful uses of nuclear energy was signed, which reaffirmed both countries' commitments to nuclear non-proliferation and set out rules for the uses of spent fuel (Yoshida, 2018).

Despite the fact that the earliest LNG import into Japan came from Alaska in 1969, the LNG trade was far less important in US-Japan energy diplomacy than the oil security and nuclear issues. That is until two historical accidents made LNG a point of common interest between the two countries: the shale revolution that turned the US into a major oil and gas exporter and the Great East Japan Earthquake that transformed Japan into the top LNG importer in the world. We detail the two transformations in the next two subsections.

The Making of an American LNG Exporting Power House

US energy policy in the twenty-first century is best characterized as bifurcated. On the one hand, federal support for renewable policy has experienced pendulum swings, expanded and rolled back with each successive presidential administration. On the other hand, the support for oil and gas production has steadily strengthened, turning the US into a net fuel exporter and eventually the top exporter in the world.

The Obama administration (2009-2017) heavily promoted clean energy, notably through the American Recovery and Reinvestment Act of 2009, which provided USD 90 billion in clean energy investments. Wind and solar deployment grew significantly, thanks to tax incentives and falling costs. The Obama presidency also brokered a climate deal with China, paving the way for the landmark Paris Agreement under the United Nations Framework Convention for Climate Change (Stern, 2024).

At the same time, it was during the Obama era that hydraulic fracturing and horizontal drilling – innovations in oil and gas production that allowed the development of shale formations – led to the "shale revolution." These technologies dramatically increased US production of oil and gas production, prompting Obama to issue the "Blueprint for a Secure Energy Future" in 2011, which expressly encouraged domestic exploration, development, and production of gas (White House, 2011). This was followed by the DOE's and FERC's approval of the first major US LNG export terminal in 2012 and the lifting of the ban on US crude oil exports in 2015 that has been in effect since the 1973 Arab oil embargo. By the end of Obama's second term, these measures turned the US from a net energy importer to one of the world's largest producers and exporters. In its review of US energy policy, the International Energy Agency credited the shale revolution for having shifted the US approach to energy policy "from a mindset of scarcity to one seeking to maximize the benefits of energy abundance," which now reflected "a strategy to boost energy production, benefit from greater energy exports, be a global leader in energy technologies and keep consumer energy bills in check" (IEA, 2019).

The first presidency of Donald Trump (2017-2020) witnessed a backlash against clean energy, in which the government imposed tariffs on solar panel imports and weakened support for wind and solar energy deployment. The Trump administration also notoriously pulled the US out of the 2015 Paris Agreement that his predecessor worked to establish. On the other hand, Trump pursued an aggressive "America first" approach to energy policy, aimed at further strengthening the US position as a major oil and gas producer and promoting the commercial interests of American energy firms overseas. By 2018, the US became the world's largest producer of oil and gas ahead of Russia and Saudi Arabia, and by 2019, the continued rise in LNG production turned the US into the world's third-largest LNG exporter (Brown & Kahan, 2019; Zaretskaya, 2019).

The presidency of Joe Biden (2021-2024) marked another decisive swing in favor of renewable energy and climate change policy. In fact, the Biden administration will be remembered for its unprecedented support for clean energy and other greenhouse gas mitigation measures. The Bipartisan Infrastructure Law of 2021 provided major funding for transmission and clean energy deployment. The largest-ever federal boost for clean energy came in the form of the Inflation Reduction Act of 2022, which catalyzed USD 493 billion in investments as of the first half of 2024 in renewable energy, zero-emission transportation, batteries, and other technologies (Bermel et al., 2023).

As was the case during the preceding two presidencies, oil and gas production and exports continue to climb under Biden. While the Biden administration paused approvals for new LNG export terminals to appease climate policy advocates, LNG exports from existing terminals continued apace. In 2024, the US more than doubled its oil- and gas-fired power generation capacity in development, propelling the country to second in the world behind China. In terms of LNG exports, 2023 marked the year in which the US became the world's largest exporter ahead of Australia and Qatar (Martos, 2025; Zaretskaya, 2024).

Japan's Transformation into an LNG Super-Importer

Japan was the largest LNG importer in the world from the 1980s until 2023, when China overtook Japan. Japan primarily relied on imports from Asia, the Middle East, Russia, and Africa, but its reliance on fuel was limited, balanced by an emphasis on growing the share of nuclear power in its national energy mix. On the assumption that nuclear power would become the main source of electricity, METI's 2010 Strategic Energy Plan aimed to reduce natural gas consumption by 25% of 2007 levels by 2030.

However, the Great East Japan Earthquake that hit Japan's northeastern shores and the explosion it caused at the Fukushima Daiichi Nuclear Reactor dramatically changed Japan's energy landscape, increasing Japan's LNG imports even further. The government paused nuclear reactors throughout Japan, filling the void in power generation with increased natural gas consumption. In a political context in which public sentiment swung decisively against nuclear power, natural gas, and LNG were expedient. LNG imports jumped from 18.2% of Japan's domestic energy mix in 2010 to 23.3% in 2013 (Koppenborg, 2021; Vivoda, 2014).

Natural gas provided the stable electricity that nuclear used to, but increasing LNG procurement created its own set of problems. Already a leading buyer of Asian LNG, Japan's increased shipments pushed up LNG prices in the Asian market. The combination of rising import volume and rising prices pushed up the average LNG import price that Japan shouldered from around $550 per ton in 2010 to around $850 per ton in 2012. Adding to this mix, the drop in Japan's exports of manufactured goods due to the global economic recession following the US subprime mortgage crisis exacerbated Japan's trade deficits (Yanagisawa, 2013).

To understand Japan's steps to ease these economic pressures, it is useful to briefly outline the structure of the Asian LNG market. The markets for natural gas have historically been fragmented by geography because of the complex network of pipelines necessary to move gas from suppliers to consumers. Even after the invention of liquefaction, LNG markets evolved in regional isolation from one another, primarily because of the high cost of liquefying and transporting gas. Three main global markets developed: the Asia-Pacific region, the European region, and the North American/Atlantic Basin region consisting of North America, South America, and Latin America. Each regional market has its own prices and pricing mechanisms. The Asian LNG market historically operated by its own set of norms. First was long-term contracts of typically around 20 years. Second was the destination requirement that prevented buyers from reselling the LNG to other markets. Third was the linking of LNG prices to those of oil, which prevented competition between gas and oil.

Japan benefited from these market norms in the late 1970s and early 1980s as they ensured supply and price stability. But as its LNG demand spiked in the post-Fukushima years, they proved to be excessively rigid, locking Japan into expensive long-term arrangements. Faced with this dilemma, the government embarked on a strategy of

promoting more flexibility in LNG contracts, increasing LNG trade volumes, and developing an LNG trading hub by the early 2020s.[1]

Increasing LNG trade volumes involved diversifying LNG suppliers to Japan. Between 2009 and 2013, Japan increased the number of LNG suppliers from 13 to 18, and increased private-sector participation in upstream development and LNG projects across the globe, including Australia, Canada, Russia, Papua New Guinea, Mozambique, and most importantly, the US (Yanagisawa, 2013).

Confluence of U.S.-Japan Interests in LNG

The US response toward Japan's energy policy in the post-Fukushima period consisted of two strands. First was to encourage Japan to find safe ways to restart its nuclear program and domestic energy sources, including renewables, while assuring the public that nuclear reactors are safe. Second, US policymakers touted the benefits of continued diversification of energy imports to ensure energy security. This second strand of the US position coupled perfectly with the shale revolution. The shale gas revolution that began around 2009 created an oversupply of gas and reduced the price of gas at home, prompting gas producers to look for export markets abroad (Koyama, 2013).

The new US LNG possibilities attracted strong attention from Asian LNG importers, especially Japan, for several reasons. First, the newfound LNG export potential from the US was enormous, promising long-term supply stability. Second, there was a strong possibility that Japan would be able to procure LNG from the US at a much cheaper price than prices prevailing in Asia. Unlike the oil-indexed LNG prices in Asia, gas prices in the US are determined according to the domestic supply-demand balance. The shale revolution catalyzed gas prices to plummet. In the years after Fukushima, US natural gas prices were as low as one-fifth of Japanese LNG import prices, even after accounting for the liquefaction and transport costs. Third, increasing LNG imports from the US meant not only further diversifying suppliers but also diversifying the pricing mechanisms of LNG procurement (Toichi, 2016).

Given these advantages, Japan not only increased its LNG imports from the US but also increased its stakes in US oil and gas production. Since 2012, Japanese companies proactively invested in US upstream and liquefaction projects, providing Japan with around 17 million tons per year, or 20% of Japanese total gas demand. These investments included the agreements in 2012 between Mitsui & Co., Mitsubishi Corporation, and Sempra Energy to export LNG from the Cameron LNG in Louisiana, between Tokyo Gas, Sumitomo Corporation, and Dominion Cove Point LNG to liquefy the gas produced in Maryland, and between Chubu Electric and Osaka Gas to secure 4.4 million tons of LNG exports each from the Freeport LNG project in Houston, Texas. More recently, JERA, Japan's largest power generator, acquired a 25.7% equity interest in the Freeport LNG project in early 2022 (JERA, 2022; Koyama, 2013; Yanagisawa, 2013).

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1 This strategy was formulated in a series of policy documents and legislation between 2014 and 2016: Cabinet Office. *Strategic Energy Plan*. 2014; 2015 Amendments to the Gas Business Act; METI. *Strategy for LNG Market Development* (in Japanese). May 2, 2016.

Recent Developments

Since 2020, two events of global significance have heightened the importance of LNG in US-Japan relations. The first was Russia's invasion of Ukraine in February 2022 and the shock it triggered in the global energy markets. The second was Trump's re-election as the 47th president of the United States in late 2024.

Russia-Ukraine War

On February 23, 2022, Russia began a full-scale invasion of Ukraine. Denunciations and sanctions by Western and Japanese governments were swift, followed by a mass exodus of multinational companies from the Russian market.

In the energy domain, however, these governments could not cut ties with Russia so easily. Russia has long been one of the world's largest oil and gas exporters, and it provided pipeline gas to Europe and nearly one-tenth of Japan's LNG imports. Russia greatly reduced its gas supply to Europe by using its structural importance as a geopolitical weapon. This forced Europe to urgently search for other gas sources, leading them to enter into procurement deals with US LNG exporters. Diverting US LNG from its destination in Asia to Europe tightened global gas supply, raising the price of gas on spot markets. Ensuring energy security has become the overwhelming concern of political leaders and policymakers across the world.

Because shipments of Russian LNG to Japan are under long-term contracts and because Japanese energy companies hold stakes in several Russian LNG projects, Japan avoided the direct impact on its LNG imports from Russia. Even then, increased competition among LNG-importing countries pushed up Asian LNG prices by sixfold on average in 2022 compared to 2019 (The Japan Times, 2025).

This crisis in global gas markets, combined with the rising domestic electricity demand due to the proliferation of artificial intelligence and data center construction, made energy security the predominant goal of Japan's energy policy and diplomacy. This concern for energy security is reflected in Japan's 7th Strategic Energy Plan, which the Ishiba administration approved in February 2025. It sets the goal of doubling renewable and nuclear energy capacity and for fossil fuels to supply between 30-40% of the total electricity by 2040. Because of LNG's low carbon intensity compared to coal, its ability to generate base load power while more renewable energy is installed, and its diversified import sources, the Strategic Energy Plan positions LNG as a panacea for decarbonization and energy security (METI, 2025).

Trump presidency's "energy dominance"

After a closely contested US presidential election, Trump won reelection in November 2024. As soon as the second Trump administration took office in late January 2025, it set in motion a series of presidential actions aimed at fundamentally restructuring US ties with its security allies and trade partners, as well as a broad swath of domestic policies, including energy.

Among these actions was Trump's executive order titled "Unleashing American Energy." This executive order had three defining characteristics: the primacy of national interest; a deep skepticism of climate change and the merits of clean energy; a strong preference for fossil fuels. To these ends, it suspended federal funding for clean energy earmarked under the Biden-era Inflation Reduction Act and the Infrastructure Law. At the same time, the Trump administration is encouraging the US energy industry to produce more oil and gas to expand their exports even further by lifting the ban on new LNG export terminals imposed by the Biden administration.

While US fossil fuel companies have welcomed these presidential actions, the Trump administration's abrupt moves in trade policy have ratcheted up uncertainty. In particular, its decision to impose steep tariffs on imports from Canada and Mexico and to increase existing tariffs on Chinese goods has prompted these trading partners to threaten to impose their own tariffs on US goods. US LNG shipments will be among the targets of China's retaliatory tariffs, sending American LNG exporters to look for more predictable markets to sell into.

The Japanese government and companies are signaling that they can provide that stability. US LNG is attractive to Japan for several reasons. Increasing imports from the US helps to diversify Japan's LNG sources, reducing dependence on the Middle East and Russia. Second, LNG from the southern US is cheaper than LNG imported from Australia, the second-largest LNG supplier to Japan. Third, buying more LNG from the US can help reduce the US trade deficit with Japan, an issue that is particularly important to Trump. This may, in turn, keep Japan in Trump's good graces, helping it avoid the wrath of the mercurial president on the security and trade fronts.

Given these benefits, negotiating an LNG deal was on the agenda in Prime Minister Ishiba's first meeting with Trump in February 2025. Takashi Uchida, Chairman of the Japan Gas Association and Tokyo Gas, said at a press conference, “I hope that Japan will be able to produce LNG cheaply and steadily. If [US] production increases, prices will fall … We can expect to see cheap LNG coming into Japan.”

An important caveat in closer US-Japan LNG cooperation is the fate of the planned Alaska LNG Project. This project links gas fields in the northern part of Alaska to a liquefaction and export terminal on the state’s southern coast via an 800-mile pipeline. The Japanese gas industry has been hesitant about any investment and purchase agreement for this project because the capital outlay for building the pipeline and terminal is certain to make LNG from Alaska more expensive than from other US sources. Japan Gas Association’s Uchida said that “there is a possibility that [President Trump] will ask us to buy Alaska LNG” and that “I hope we will not be forced to pay high prices” (Sankei Shimbun, 2025).

Conclusion and Outlook for the Future

After the meeting with Ishiba, Trump declared that the US and Japan would form a "joint venture" to produce and export LNG from Alaska to Japan (Davis, 2025). While Japan hoped to buy more LNG from the US, the expected high cost of Alaska LNG makes this the second-best option. No concrete details have emerged following this announcement, and Japanese companies that have evaluated the project's prospects are hesitant to make any commitments.

Overall, for Japan, maintaining friendly relations with the Trump administration is of utmost importance, given the significance of the bilateral alliance, strategic diplomacy, and the recent elevated energy conundrum. While some analysts doubt that Japanese firms will commit to a costly agreement to develop the Alaska LNG Project (Reynolds and Doleman, 2024), the Japanese government may pressure firms to invest in it as well as purchase cheaper LNG from existing US LNG projects. At the very least, these agreements, combined with increased Japanese investments in the broader US economy, will help keep Japan safe from the Trump administration's aggressive approach to diplomacy in other domains.

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