

Amigo LNG has no gas: no signed supply and no pipeline to deliver it. Gas supply and pipelines for the export projects in the Gulf of California (Sea of Cortez)

Key finding: Amigo LNG has no secured gas. The project asking the US Department of Energy for two more years to start exporting has **no signed gas supply contract and no confirmed pipeline capacity** to bring gas to Guaymas, according to its own DOE filings and public reporting. The nearest pipeline is fully contracted by CFE, another is out of service until at least 2029, and the new pipeline it would need has not been approved, financed or built.

1. AMIGO LNG (GUAYMAS, SONORA) · DOE DOCKET FE 20-31-LNG

- **Authorization:** DOE Order 4629 (Dec 2020), 395 Bcf/year of US gas, exports to begin by Dec 8, 2027; extension to Dec 2029 requested Dec 12, 2025, still pending.
- **Gas supply (developer's DOE filings):** a 15-year memorandum of understanding with CFEnergía (Feb 2024); a letter of intent with an unnamed "Texas entity" for 285 MMscf/d (2025). In Dec 2025 the developer said agreements for more than 750 MMscf/d were "ready for execution in sync with FID." **None is reported as signed.**
- **Pipeline:** the developer's filings name no pipeline and no border crossing; it says it is still in talks with "U.S. pipeline interconnects for cross-border gas delivery."
- **Existing routes are constrained:** the nearest line, Sásabe–Guaymas (IEnova/Sempra), is fully contracted by CFE; IEEFA estimates a shortfall of about 300 MMcf/d for Amigo. A route reported by Argus relies on the Guaymas–El Oro pipeline, which Sempra disclosed has been out of service since 2017 and is not due back before 2029.
- **New pipeline proposed:** Naco–Guaymas ("Sonora Energy Corridor"), about 500 km of 48-inch pipe, with Cenagas and Freedom LNG; terms agreed June 2026, no final investment decision; cost reported at US\$2.8–6.8 billion; the US-side supply and border crossing have not been identified.

WHY BUILDING NEW PIPELINES HERE IS SO HARD

- **The Guaymas–El Oro precedent:** Sempra/IEnova finished this pipeline in May 2017; by August 2017 it was out of service. The Yaqui community of Loma de BÁCUM rejected the route through its territory, obtained federal court suspensions and removed a section of pipe. Nine years later the pipeline is still idle; Sempra says it "continues to acquire and pursue the necessary rights-of-way and permits" for a reroute, and community members have vowed to dismantle it again if a new route crosses their land.
- **Saguaro's pipelines remain unbuilt:** more than two years after FERC approved the US border crossing (Feb 2024), neither the Saguaro Connector in Texas nor the Sierra Madre pipeline in Mexico has been built, and the FERC deadline has been pushed to 2030.
- **Amigo would need a new line:** any new route to Guaymas, such as the proposed ~500 km Naco–Guaymas pipeline, must secure rights of way across Sonora, potentially through environmentally sensitive areas and Indigenous territories, with consultation duties under Mexican and international law, and a US border-crossing permit for the cross-border link.

2. SAGUARO LNG (PUERTO LIBERTAD, SONORA) · DOE DOCKETS 18-70-LNG, 22-167-LNG

- **US side:** ONEOK's Saguaro Connector, ~155 miles from the Waha hub (Permian) to a new crossing in Hudspeth County, Texas; FERC permit 2024 (CP23-29), deadline extended to Feb 2030. Not built.

- **Mexico side:** Sierra Madre pipeline, ~800 km to Puerto Libertad, owned by a Mexico Pacific affiliate. Not built.
- **Gas:** 20-year firm supply from CFE International (about 40% of feedgas), from the Permian. DOE requests pending; no final investment decision.

3. TOPOLOBAMPO (SINALOA)

- **Ammonia plant, GPO (Proman's Mexican subsidiary):** about 91% built (June 2026); 15-year gas contracts with CF Energía and CFE International; press reports supply via TC Energía's El Encino–Topolobampo pipeline, fed from Texas through Trans-Pecos and Ojinaga–El Encino.
- **Pacífico Mexinol methanol plant (Transition Industries, with the IFC):** CF Energía contract for ~160 MMcf/d of US gas via "existing cross-border infrastructure" (no pipeline named); groundbreaking April 2026, operations targeted 2029–30.
- **Vista Pacífico LNG (Semptra):** cancelled, announced March 2026.

SUMMARY

Project	Gas source	Pipelines	Status
Amigo LNG	Permian; MOU and letter of intent only; agreements unsigned	None confirmed. Sásabe–Guaymas full (CFE); Guaymas–El Oro idle since 2017 (Yaqui opposition); Naco–Guaymas proposed, not approved or financed	No FID; DOE extension pending; works suspended by court
Saguaro LNG	Permian (Waha); CFE International 20-yr	Saguaro Connector + Sierra Madre (both unbuilt)	No FID; DOE requests pending
GPO ammonia	CFE companies, 15-yr	El Encino–Topolobampo (press)	~91% built
Pacífico Mexinol	CF Energía, US gas	Not named	Groundbreaking Apr 2026
Vista Pacífico LNG	—		Cancelled (Mar 2026)

Notes: sources differ on Sásabe–Guaymas capacity (812 vs 770 MMcf/d) and on the Naco–Guaymas cost; the Argus route is based on a published summary.

SOURCES

- Developer's extension request to DOE (Dec 12, 2025): [energy.gov](https://www.energy.gov)
- Developer's semi-annual reports to DOE (Apr 2024, Apr 2025): [DOE docket 20-31-LNG](#)
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- Zeta Tijuana on Semptra's SEC filing (Mar 4, 2026): [zetatijuana.com](https://www.zetatijuana.com)
- Argus, Amigo LNG and Cenagas feeder pipeline (Jul 8, 2026): [argusmedia.com](https://www.argusmedia.com)
- Pipeline & Gas Journal, Sonora pipeline (Jul 1, 2026): [pgjonline.com](https://www.pgjonline.com)
- ONEOK Saguaro Connector permit application (Dec 2022): [prnewswire.com](https://www.prnewswire.com); deadline extension: [Federal Register](https://www.federalregister.gov)
- Mexico Pacific report to DOE (Oct 1, 2026): [energy.gov](https://www.energy.gov)
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- Global Energy Monitor, Guaymas–El Oro Pipeline (status, Yaqui opposition, reroute): [gem.wiki](https://www.gem.wiki); Mongabay Latam (May 2018): es.mongabay.com
- TC Energy, Topolobampo pipeline: [tcenergy.com](https://www.tcenergy.com)

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