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EPCILON LNG LLC

PROJECT DEVELOPMENT COMPANY

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October 1, 2025

RECEIPT REQUESTED

Via Electronic Filing: *fergas@hq.doe.gov*

Attn: Ms. Peri Ulrey
Office of Regulation, Analysis and Engagement
U.S. Department of Energy
1000 Independence Avenue SW
Washington, DC 20585

Re: *Epsilon LNG LLC*
DOE/FE Order No. 4629
FE Docket No. 20-31-LNG
Semi-Annual Report: October 2025

Dear Ms. Ulrey:

On December 8, 2020, the U.S. Department of Energy, Office of Fossil Energy (“DOE/FE”) issued Order No. 4629 granting Epsilon LNG LCC (“Epsilon”) a long-term authorization to export natural gas to Mexico for liquefaction and re-export such natural gas as liquefied natural gas (“LNG”), from Mexico to nations with which the United States has (“FTA”), and does *not* have (“NFTA”), free trade agreements requiring national treatment in trade of natural gas. The FTA and NFTA authorizations require Epsilon to file semi-annual reports, on or before April 1 and October 1 in each year, describing the following: (1) the status of the project’s LNG facility (“the LNG Facility”), (2) the date the LNG Facility is expected to commence first exports of LNG, (3) the status of the long-term contracts associated with (a) exporting LNG from U.S.-sourced natural gas and (b) any long-term natural gas supply contracts for the LNG Facility. Epsilon hereby submits its semi-annual report covering the period April 1, 2025 through September 30, 2025.

During this period:

- The municipal alignment and land use feasibility report was submitted to Urban Control at the Municipality of Guaymas and has been approved.
- Marine sub-concession agreement was signed between the ASIPONA Guaymas (The Administration of The National Port System of Guaymas) and Amigo LNG with an overall long-term lease duration of 36 years.

The LNG Facility is expected to begin exporting LNG by October 1, 2028

The following major project milestones have been completed during the last period:

1. Letter of Award have been signed with a Engineering, Procurement, and Construction (“EPC”) contractor, Constructora Manzanillo SA de CV (“Comsa Marine”) for the marine infrastructure.
2. Letter of Award have been signed with Chart Industries, USA for the LNG liquefaction technology, specifically for Integrated Pre-cooled Single Mixed Refrigerant (“IPSMR”) process technology and modular liquefaction solution.
3. Letter of Award have been signed Honeywell, USA, for the modular LNG pretreatment technology and Integrated Control and Safety Systems (“ICSS”).
4. The EPC contract for the conversion of Floating Storage Units (“FSU”) and the fabrication of newbuild FLNG barges was signed with Drydocks World from Dubai, UAE.
5. A Sale and Purchase Agreement (“SPA”) was signed to supply 0.6 million tonnes per annum (“MTPA”) of LNG over a 15-year term with OQ Trading Limited.
6. A SPA was signed to supply 0.6 MTPA of LNG over a 20-year term with Sahara Energy Resource Limited.
7. A SPA was signed to supply 0.85 MTPA of LNG over a 20-year term with Gunvor Singapore Pte Ltd.
8. A SPA was signed to supply 0.6 MTPA of LNG over a 15-year term with Macquarie Energy LLC as successor in interest to Macquarie Commodities Trading US, LLC.
9. An EU based O&M operator has been selected for the O&M services, with contract negotiations still in progress and is expected to be executed in October 2025.
10. Contract negotiations underway with a Texas based Asset Management Company for ensuring compliance during operations and managing terminal interfaces.

If you have any questions or require any additional information, please do not hesitate to contact me at (713) 240-2631 or mc@lngalliance.com.

Sincerely,

A handwritten signature in blue ink, appearing to read 'R. Muthu' with a stylized flourish at the end.

Muthu Chezhan

President for Epsilon LNG LLC