



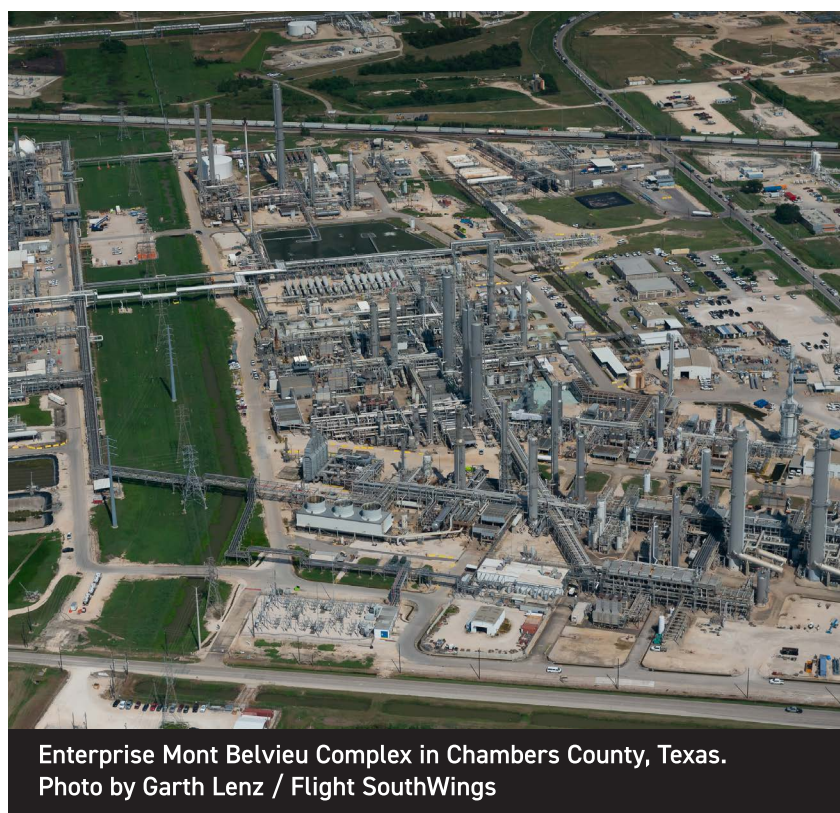
Natural gas liquids (NGLs) — the raw building blocks of most plastics — are a component of the raw natural gas that comes out of oil and gas wells. At gas processing plants, NGLs are separated from the dry, or consumer-grade gas, mostly methane, that is used to heat homes or fuel power plants. The NGLs are then transported to fractionators, which are refinery-like industrial sites that split the mixed NGLs into individual products: ethane, propane, butane, and pentanes. Each have their own industrial purposes, but the most widely used NGLs are major ingredients for plastics manufacturing. Ethane, for example, is converted or “cracked” into ethylene, and propane can be used to make propylene, both key ingredients for plastics.

In the U.S., NGL production and exports have climbed steadily over the last two decades. NGL production has more than quadrupled, increasing from 1.7 million barrels per day in 2005 to 7.5 million barrels per day in 2025.¹ NGL processing capacity trails at 6.8 million barrels per day.² The surge has pushed prices down and demand up, both at home and abroad.³ Exports reached 3.1 million barrels per day in 2025, going mainly to China, Japan, Canada, Mexico, and South Korea, where NGLs feed the petrochemical industry. Ethane exports alone increased nearly 20 percent in 2025, driven by demand for feedstock for new ethane crackers in Mexico and China. Because the U.S. is one of the only countries that can ship ethane overseas, ethane cracker projects coming online around the world are expected to keep driving demand for American ethane.⁴

Because NGLs come out of the ground alongside oil and gas, NGL production is bound up with a broader surge in U.S. oil and gas drilling. Policies that promote or accelerate drilling can result in more NGL production as a byproduct. For example, the Trump Administration has moved to accelerate production under its “energy dominance” agenda. In his first days in office, President Trump declared a national energy emergency and directed federal agencies to expand oil and gas production and fast-track permits for pipelines and other energy infrastructure. U.S. crude oil output hit a record of more than 13.6 million barrels per day in 2025, led by the Permian Basin, which also produced 3.2 million barrels per day of NGLs.⁵

As of July 31, 2026, Oil & Gas Watch was closely tracking 30 NGL processing, storage, export, and pipeline projects across the U.S. — 17 are under construction, nine are proposed, and four are on hold (status is unknown or progress appears to have stalled). Over 80 percent of these projects are in Texas, home to the Permian region, where nearly half of the natural gas production is “wet” gas containing NGLs.⁶

Companies have announced 14 fractionator projects, including five new plants, eight expansions, and one plant being rebuilt after an explosion. If all of them are built, they could increase fractionation capacity by over 2.6 million barrels per day — a 39 percent increase over NGL fractionation capacity.⁷ Half of the projects are already underway.

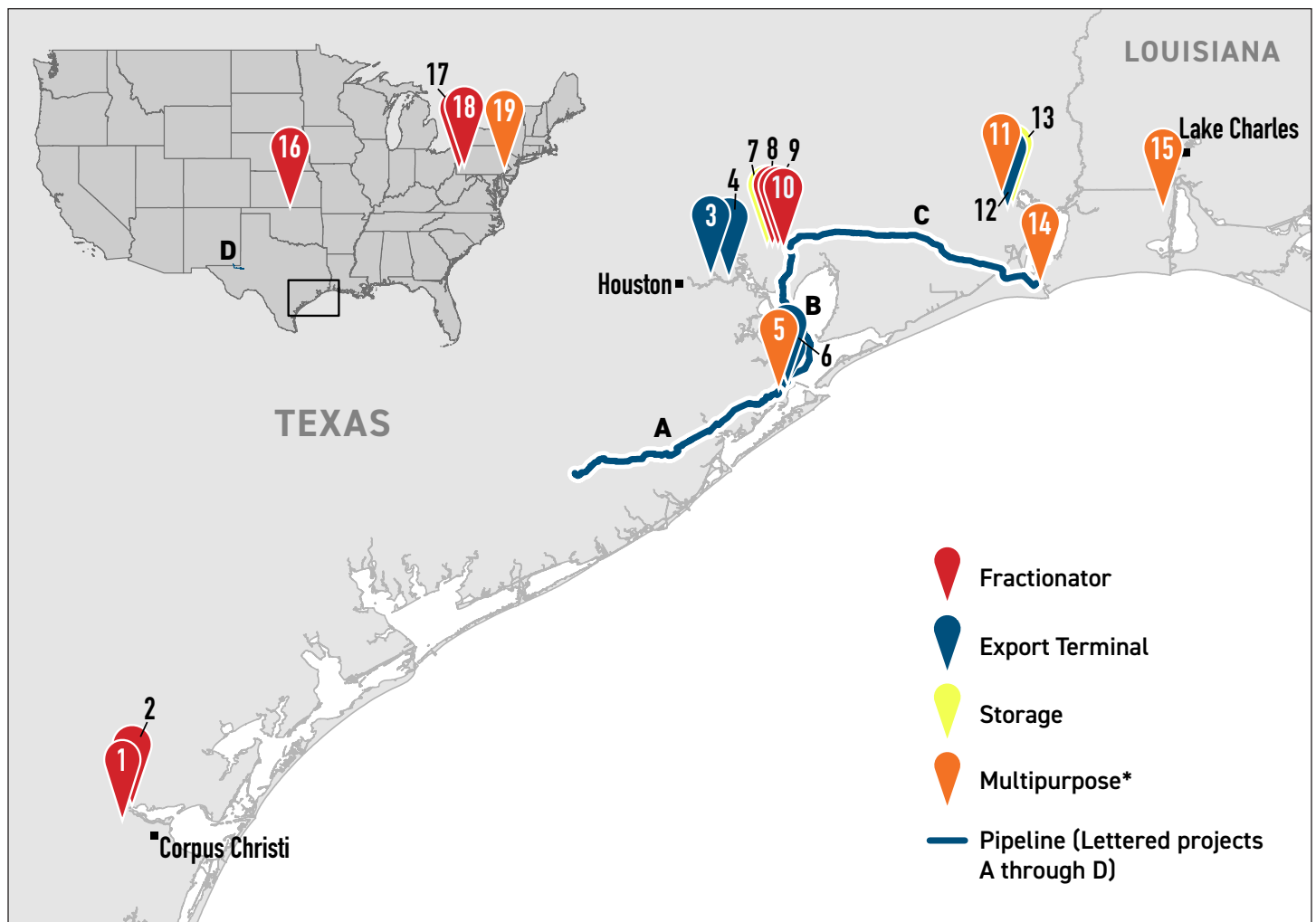


Enterprise Mont Belvieu Complex in Chambers County, Texas.
Photo by Garth Lenz / Flight SouthWings

This growing supply needs more infrastructure to move, store, and export it. Eight pipeline projects – at least 769 miles of new pipelines – could add approximately 1.6 million barrels per day of capacity. Seven NGL storage projects would add at least 34 million barrels of capacity. And seven export terminal projects, three new and four expansions, could increase export capacity by over 1.4 million barrels per day, a 47 percent increase over 2025 if all are built.⁸

Permit documents, where available, indicate that 13 of the NGL projects tracked on [Oil & Gas Watch](#) could emit up to 2,827 tons every year of health-harming air pollutants (classified as “criteria” pollutants by EPA). Greenhouse gas emissions data are largely unavailable for these projects because they usually obtain minor source air permits. However, the processing of natural gas liquids is a key part of the carbon-intensive process of plastics manufacturing. Researchers estimate production of common plastics like polyethylene and polypropylene, which rely on ethane and propane, can emit nearly 2 tons of greenhouse gases per ton of plastic produced.⁹ Another study estimates hydrocarbon refining and processing, like fractionation, contributes to 16 percent of the greenhouse gas emissions from plastic production.¹⁰

Locations of Proposed and Under Construction Natural Gas Liquids Projects



*Multipurpose projects reflect those that may fractionate, export, and/or store NGLs. See the table below for more details.

Note: Location information is unavailable for some pipelines. The Hackberry NGL Facility (#15) location is approximate. Some projects on the map are closely clustered and locations may be slightly approximated for visibility. See [Oil & Gas Watch](#) for greater detail.

NATURAL GAS LIQUIDS PROJECTS

#	Location	Company	Project Type	Project Name	Classification	Project Status*	Clean Air Act Construction Permit Status	Capacity**	Expected Operating Year
1	Nueces County, TX	Permico	Fractionator	Permico Robstown - Fractionation Trains 1 & 2	New	Proposed	Final Issued	330,000 bpd	2027
	Nueces County, TX	Permico	Fractionator	Permico Robstown - Fractionation Train 3	Expansion	On Hold/Unknown	Awaiting Application	150,000 bpd	Unknown
	Nueces County, TX	Permico	Fractionator	Permico Robstown - Fractionation Train 4	Expansion	On Hold/Unknown	Awaiting Application	150,000 bpd	Unknown
2	Nueces County, TX	Phillips 66	Fractionator	Coastal Bend Fractionator - Train 3	Expansion	Proposed	Awaiting Application	100,000 bpd	2028
3	Harris County, TX	Targa Resources Corp.	Export Terminal	Galena Park Marine Terminal - LPG Export Capacity Expansion	Expansion	Under Construction	Final Issued	132,000 bpd	2027
4	Harris County, TX	Enterprise Products	Export Terminal	Enterprise Hydrocarbons Terminal - Propane Refrigeration Train IV	Expansion	Under Construction	Final Issued	300,000 bpd	2026
5	Galveston County, TX	MPLX	Fractionator, Storage	Texas City NGL Fractionation and Storage - Trains 1 and 2	New	Under Construction	Final Issued, Application Pending	300,000 bpd	2028/2029
6	Galveston County, TX	ONEOK, MPLX	Export Terminal	Texas City Logistics LPG Export Terminal	New	Under Construction	Final Issued	400,000 bpd	2028
7	Chambers County, TX	Energy Transfer	Storage	Mont Belvieu Ethane Storage Cavern	New	Under Construction	Unknown	3 MMbbl	2027
8	Chambers County, TX	Energy Transfer	Fractionator	Energy Transfer Mont Belvieu Frac IX	New	Under Construction	Final Issued	165,000 bpd	2026
9	Chambers County, TX	Targa Resources Corp.	Fractionator	Targa Mont Belvieu North - Fractionation Train 12	Expansion	Under Construction	Final Issued	150,000 bpd	2027
	Chambers County, TX	Targa Resources Corp.	Fractionator	Targa Mont Belvieu North - Fractionation Train 13, 14, & 15	Expansion	Under Construction	Final Issued	510,000 bpd	2028
10	Chambers County, TX	Enterprise Products	Fractionator	Enterprise Mont Belvieu Complex - Frac XV	Expansion	Under Construction	Final Issued	150,000 bpd	2028
11	Orange County, TX	Enterprise Products	Storage, Export Terminal	Enterprise Beaumont Marine East - Ethane Export Terminal	Expansion	Proposed	Awaiting Application	Unknown	Unknown



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NATURAL GAS LIQUIDS PROJECTS

#	Location	Company	Project Type	Project Name	Classification	Project Status*	Clean Air Act Construction Permit Status	Capacity**	Expected Operating Year
12	Jefferson County, TX	Energy Transfer	Export Terminal	Energy Transfer Nederland NGL Export Expansion	Expansion	Proposed	Awaiting Application	295,000 bpd	2028/2029
13	Jefferson County, TX	Energy Transfer	Storage	Energy Transfer Nederland LPG Terminal - Refrigerated Storage Expansion	Expansion	Under Construction	Final Issued	0.8 MMbbl	2027
14	Jefferson County, TX	ONEOK	Storage, Export Terminal	TXGC Sabine Pass NGLs Terminal	New	On Hold/Unknown	Awaiting Application	Unknown	Unknown
15	Cameron Parish, LA	Moss Lake Partners	Fractionator, Storage, Export Terminal	Hackberry NGL Facility	New	Proposed	Awaiting Application	300,000 bpd fractionation; 30 MMbbl storage; 315,000 bpd export	Unknown
16	Grant County, OK	ONEOK	Fractionator	Medford Fractionator Rebuild	Restart	Proposed	Final Issued	210,000 bpd	2026/2027
17	Washington County, PA	MPLX	Fractionator	Harmon Creek Gas Plant - Cryo III	Expansion	Under Construction	Final Issued	40,000 bpd	2026
18	Washington County, PA	Energy Transfer	Fractionator	Revolution Cryogenic Plant - Unit 2	Expansion	Proposed	Draft Issued	45,400 bpd	Unknown
19	Delaware County, PA	Energy Transfer	Fractionator, Storage	Marcus Hook Industrial Complex - Terminal Optimization	Expansion	Under Construction	Final Issued	20,000 bpd fractionation; 0.9 MMbbl storage	2027

*"On Hold/Unknown" projects are those where progress appears to have stalled within the last three years and publicly available information about the current status is limited.

**bpd = barrels per day; MMbbl = million barrels



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NATURAL GAS LIQUIDS PIPELINE PROJECTS

#	State(s)	Company	Project Name	Project Type	Project Status*	Length (Miles)	Additional Capacity (bpd)**	Expected Operating Year	Associated NGL Facilities
-	TX	Energy Transfer	Delaware Basin NGL Pipe Extension	Expansion	Proposed	Unknown	150,000	2027	Energy Transfer Mont Belvieu Complex
-	TX	Targa Resources Corp.	Speedway NGL Pipeline	New Pipeline	Proposed	500	500,000	2027	Targa Mont Belvieu Complex, Targa Mont Belvieu North, Yeti Gas Plant
-	TX	Energy Transfer	Lone Star Express Expansion	Expansion, Upgrade	Under Construction	0	90,000	2026	Energy Transfer Mont Belvieu Complex
A	TX	MPLX	MPLX BANGL Pipeline - Texas City Extension	Expansion	Under Construction	64	Unknown	2028	MPLX Texas City NGL Fractionation and Storage
-	TX	MPLX	MPLX BANGL Pipeline Expansion	Expansion	Under Construction	0	50,000	2026	MPLX Texas City NGL Fractionation and Storage
B	TX	ONEOK, MPLX	MBTC Pipeline	New Pipeline	Under Construction	45	400,000	2028	Texas City Logistics LPG Export Terminal, ONEOK Mont Belvieu NGL Fractionation Plant
C	TX	ONEOK	TXGC Sabine Pass Pipeline	New Pipeline	On Hold/Unknown	68	Unknown	Unknown	ONEOK Mont Belvieu NGL Fractionation Plant, TXGC Sabine Pass NGLs Terminal
D	NM, TX	Enterprise Products, ExxonMobil	Cowboy Connector (Bahia Expansion and Extension)	Expansion	Under Construction	92	400,000	2027	Enterprise Mont Belvieu Complex

**bpd = barrels per day



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Endnotes

¹ U.S. Energy Information Administration (EIA), U.S. Field Production of Natural Gas Liquids, Accessed August 17, 2026. Link: https://www.eia.gov/dnav/pet/hist/LeafHandler.ashx?n=PET&s=M_EPL2_FPF_NUS_MB-BLD&f=A.

² Christopher Charleston, "As US Expands NGL Exports, Fractionation Capacity Risk Emerges," *EnergyNow Media*, November 21, 2025. Link: <https://energynow.com/2025/11/as-us-expands-ngl-exports-fractionation-capacity-risk-emerges/>.

³ U.S. EIA, "Natural gas plant liquids exports reached record heights in 2025," March 30, 2026. Link: <https://www.eia.gov/TODAYINENERGY/detail.php?id=67387>.

⁴ Ibid.

⁵ U.S. EIA, "U.S. crude oil production rose in 2025, setting new record," March 31, 2026. Link: <https://www.eia.gov/todayinenergy/detail.php?id=67404>; Housley Carr, "Hold On ... I'm Comin' – Producers, Midstreamers Preparing for Rising Tide of Permian-Sourced NGLs," *RBN Energy LLC*, January 6, 2026. Link: <https://rbnenergy.com/daily-posts/blog/producers-midstreamers-preparing-rising-tide-permian-sourced-nxls>.

⁶ U.S. EIA, "U.S. associated natural gas production increased 6% in 2024," November 21, 2025. Link: <https://www.eia.gov/todayinenergy/detail.php?id=66684>.

⁷ Christopher Charleston, "As US Expands NGL Exports, Fractionation Capacity Risk Emerges," *EnergyNow Media*, November 21, 2025. Link: <https://energynow.com/2025/11/as-us-expands-ngl-exports-fractionation-capacity-risk-emerges/>.

⁸ Natural gas plant liquids exports reached record highs in 2025," March 30, 2026. Link: <https://www.eia.gov/TODAYINENERGY/detail.php?id=67387>.

⁹ W. Leal Filho et al, "Decarbonising the plastic industry: A review of carbon emissions in the lifecycle of plastics production," *Science of the Total Environment*, October 15, 2025, page 3. Link: <https://www.sciencedirect.com/science/article/pii/S0048969725019771>.

¹⁰ Nihan Karali et al, "Climate Impact of Primary Plastic Production," *Lawrence Berkeley National Laboratory*, April 12, 2024, page 5. Link: <https://escholarship.org/uc/item/12s624vf>.