BUSINESS LINE, Delhi, 4.8.2025
Page No. 3, Size:(22.44)cms X (7.18)cms.

Decline in India's Russian crude oil imports may boost demand for VLCCs

Rishi Ranjan Kala
New Delhi

A major decline in India's import of Russian crude oil is sure to affect the global tanker trade patterns. Demand for very large crude carriers (VLCCs) is set to rise when India turns to its traditional buyers — West Asia.

Besides, the European Union's (EU) 18th sanctions package lowers the price cap from $60 a barrel to $47.6, which would mean that Russia will have to expand its dark fleet strength to continue delivering its flagship grade Urals to buyers in India, China and Turkey.

According to a July 31 report by maritime consultancy Drewry, tightening of sanctions on Iranian and Russian oil by the US and EU may lead to notable shifts in global tanker trade patterns.

Rajesh Verma, Deputy Director of Tanker Shipping at Drewry, said although the US has not specified the penalty for buying Russian oil by India, any significant penalty might discourage the latter to buy Russian oil and look for alternative supplies.

EVOLVING PATTERNS

India is one of the major buyers of Russian oil and most of this trade is done on Suezmax and Aframax tankers, he added.

'TANK'ED EFFORTS. India is a major buyer of Russian oil. Most of this trade is done by Suezmax and Aframax tankers REUTERS

Aframax vessels are ships with capacity of 80,000 and 120,000 deadweight tons (dwt), while Suezmax is between 125,000-180,000 dwt.

On the other hand, VLCCs can be between 200,000 and 320,000 dwt.

"However, any possible decline in India's imports of Russian crude will lead to a significant increase in the country's imports from other sources, especially West Asia. In such a situation, the demand for VLCCs will increase at the expense of mid-size tankers as the former dominate the loadings in Arabian Gulf," Verma anticipated.

The lower price cap of $47.6 per barrel, Verma explained, will make it extremely difficult for Russia to use the mainstream international fleet for the transportation of its crude as Urals are unlikely to trade below such a low price cap.

"Earlier, whenever Urals tend to trade below the price cap (especially in the low price environment), the mainstream fleet, especially from Greek owners, used to carry the Russian cargo. However, for selling Urals above the new price cap, Russia will need to expand the parallel fleet (normally called dark/grey fleet)," he added.

EU, US SANCTIONS

Verma pointed out that while sanctions by the US and EU reflect a stepped-up effort to curb Iranian and Russian oil revenues, there appears to be limited alignment in their strategies.

"The EU remains focused on constraining Russia's energy income, whereas the US is pursuing broader geopolitical objectives, including trade leverage and renewed diplomatic engagement with Iran," he added.

Previous rounds of sanctions on Russian, Iranian, and Venezuelan crude have led to the emergence of a parallel market for transporting sanctioned oil, noted Verma.

Despite an expanding list of sanctioned vessels and the G7 price cap mechanism, Russian crude continues to reach select buyers. Likewise, Iranian oil has steadily flowed to Asian markets, even with US sanctions in place since 2019.

"Going forward, it will be important to observe how the latest wave of sanctions on Russian and Iranian oil influences the dynamics of the tanker market," Verma anticipated.

HINDU, Delhi, 4.8.2025
Page No. 18, Size:(6.23)cms X (6.89)cms.

MOSCOW

Fire at Sochi oil depot in Russia put out after Ukrainian drone attack

AFP

A Ukrainian drone attack caused two oil tanks to catch fire at an oil depot in Sochi in southern Russia but the blazes were later extinguished, local authorities said on Sunday. Russia's air defence units destroyed 93 Ukrainian drones overnight, including one over the Krasnodar region and 60 over the Black Sea. REUTERS

MINT, Delhi, 4.8.2025
Page No. 11, Size:(5.74)cms X (8.29)cms.

IBA seeks cheaper power for CBG units

Indian Biogas Association (IBA) has urged the ministry of petroleum and natural gas to provide a concessional electricity tariff for compressed biogas (CBG) plants to boost the clean energy transition.

In a comprehensive submission to the ministry, IBA stressed that the cost of electricity is a significant operational expense, averaging 30% of overall operational expenditure, ranging between 20% and 48%, based on the feedstock used and the scale of the plant, an IBA statement said.

IBA's suggestion to the ministry to shift from applicable industrial tariffs for electricity (average rate of ₹7 per kWh) to domestic tariffs (₹4.5 per kWh) would provide significant cost savings across all categories of feedstocks, and this tariff reform would make the sector much more operationally viable. **PTI**

PIONEER, Delhi, 4.8.2025
Page No. 10, Size:(24.90)cms X (16.99)cms.

IBA urges Government to provide concessional electricity tariff

PIONEER NEWS SERVICE
New Delhi

The Indian Biogas Association (IBA) has urged the Ministry of Petroleum and Natural Gas to provide a concessional electricity tariff for compressed biogas (CBG) plants to boost the clean energy transition.

In a comprehensive submission to the ministry, IBA stressed that the cost of electricity is a significant operational expense, averaging 30 percent of overall OPEX, ranging between 20 per cent and 48 per cent, based on the feedstock used and the scale of the plant, an IBA statement said.

According to the statement, IBA has suggested that the government should grant concessional electricity rates to CBG plants, which are at a disadvantage due to high industrial electricity charges that account for as high as 48 per cent of their running costs.

The association's detailed cost study indicates that at an average industrial tariff of ₹7 per kWh, electricity takes up a significant portion of the overall operating costs of commercial-scale CBG plants, like 34 per cent in paddy straw-based plants, 28 per cent in press mud-based plants, 19 per cent in cow dung-based plants, and as high as 48 per cent in Municipal Solid Waste (MSW)-based plants.

The IBA's suggestion to the ministry to shift from applicable industrial tariffs for electricity (average rate of ₹7 per kWh) to domestic tariffs (₹4.5 per kWh) would provide significant cost savings across all categories of feedstocks, and this tariff reform would make the sector much more operationally viable.

IBA Chairman Gaurav Kedia said, "The CBG industry is a keystone in achieving India's Panchamrit commitments announced at COP26. By easing the cost burden of electricity for CBG plants, we can drive our 50 per cent non-fossil energy transition by 2030 and underpin our Net Zero emissions goal by 2070. With one such policy measure, we can reverse the economics of clean energy manufacturing and bring much-needed private capital to scale the sector across the country".

The grouping underscored that high industrial tariff rates now function as a structural hindrance, having a direct bearing on profit margins and cash flows, especially in the most important formative years, when projects are consolidating.

Financial pressure deters new market players from entering and hinders the expansion of existing units.

According to the statement, IBA has suggested that the Government should grant concessional electricity rates to CBG plants

The concessional tariff offer is set to enhance sector competitiveness, trigger private participation, and facilitate smoother integration of CBG into India's energy mix, supporting the government's wider clean energy transition goals, it stated.

The IBA is the first and largest professional biogas association for stakeholders in the biogas industry, including technology providers, project developers, plant operators, planners of biogas plants, and representatives from public policy, science and research in India.

The association was established in 2011 and revamped in 2015 to promote a greener future through biogas.

The motto of the association is "propagating biogas in a sustainable way".

TIMES OF INDIA, Delhi, 4.8.2025
Page No. 12, Size:(17.67)cms X (9.78)cms.

India financing Russia's war in Ukraine by buying oil from Moscow: Trump aide

Washington: A top aide to Donald Trump on Sunday accused India of effectively financing Russia's war in Ukraine by purchasing oil from Moscow, after the US president escalated pressure on New Delhi to stop buying Russian oil.

"What he (Trump) said very clearly is that it is not acceptable for India to continue financing this war by purchasing the oil from Russia," said Stephen Miller, deputy chief of staff at the White House and one of Trump's most influential aides.

'What he (Donald Trump) said very clearly is that it is not acceptable for India to continue financing this war by purchasing the oil from Russia,' said Stephen Miller, deputy chief of staff at the White House. The Indian embassy in Washington did not immediately respond to a request for comment

Miller's criticism was some of the strongest yet by the Trump administration about one of the US's major partners in the Indo-Pacific.

"People will be shocked to learn that India is basically tied with China in purchasing Russian oil. That's an astonishing fact," Miller said on Fox News' 'Sunday Morning Futures'. The Indian embassy in Washington did not immediately respond to a request for comment.

Indian govt sources told Reuters on Saturday that New Delhi would keep purchasing oil from Moscow despite US threats. A 25% tariff on Indian products went into effect on Friday as a result of its purchase of military equipment and energy from Russia.

Trump has also threatened 100% tariffs on US imports from countries that buy Russian oil unless Moscow reaches a major peace deal with Ukraine. Miller tempered his criticism by noting Trump's relationship with PM Narendra Modi, describing it as "tremendous." REUTERS

India hasn't told refiners not to buy Russian oil

Bloomberg
feedback@livemint.com

India hasn't given the country's oil refiners instructions to stop buying Russian oil, according to people familiar with the matter, as officials grapple with meeting energy needs and maintaining ties with Moscow without further angering US President Donald Trump.

No decision has been taken as yet on stopping imports from Russia, the people said, asking not to be named due to the sensitivity of the matter. Both state-run or private refiners are allowed to buy from their preferred sources, and crude purchases remain a commercial decision made by them, several of the people said.

Trump blasted India on Wednesday for continuing to purchase most of its military equipment and energy from Russia. The US leader imposed a surprise 25% tariff on India and threatened an additional penalty for its close ties with Moscow. Two days later, Trump told reporters he "heard" India would no longer be buying oil from Russia, calling it "a good step".

India has maintained its energy purchases are driven by market forces and price. Last week, refiners were told to come up with plans for buying non-Russian crude, people familiar said to *Bloomberg*.

BUSINESS STANDARD, Delhi, 4.8.2025
Page No. 4, Size:(29.66)cms X (29.22)cms.

Nayara's pump supplies steady amid EU, US sanctions trouble

Only casualty for now is the export of fuels by the refiner

S DINAKAR
Amritsar, 3 August

With the firm coming under the European Union's (EU's) latest bout of sanctions 18 days ago, Rosneft-run Indian refiner Nayara Energy may have temporarily lost its export market and reshuffled top management persons, but has kept India's domestic fuel market well supplied.

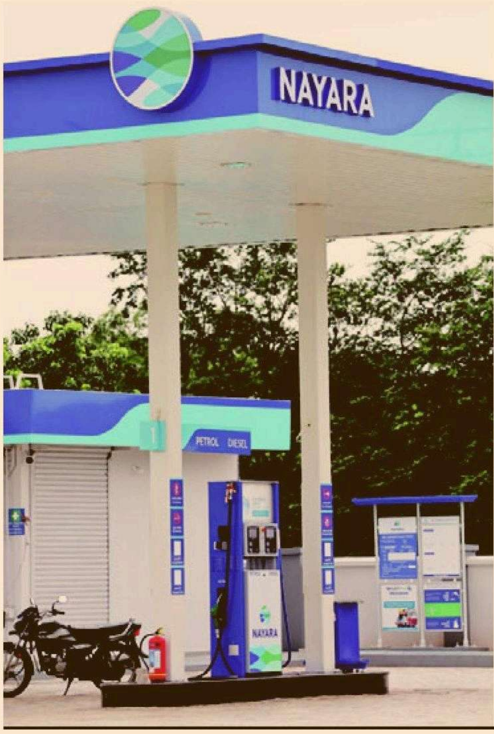
Petrol and diesel were plentiful, and the pump never went dry in recent weeks, they told *Business Standard*. They were expecting an 18-kilolitre tanker the following day to restock the outlet.

The refiner, which owns a 400,000 bpd (barrels a day) refinery on the west coast, in which Rosneft, Russia's state-run producer, holds a 49.13 per cent stake, was targeted by the EU on July 18 as part of the 18th sanctions package against Russia to stop Moscow's invasion of Ukraine.

Nayara is also continuing supplies to local refiners, officials from state-run refiners said.

India's domestic fuel market and imports of crude oil are relatively unscathed by the EU sanctions and subsequent secondary tariffs by United States President Donald Trump on Indian purchases of Russian oil, officials in refining units said.

New Delhi has made no specific comments on Nayara, but the foreign ministry said on Friday that "on our energy sourcing requirements... we look at what is there available in the markets, what is there on offer, and also what is the prevailing global situation or circumstances".



Nayara snapshot

Vadinar refinery

400,000
Capacity (bpd)

8% of national capacity

415,000 bpd
Capacity in Apr-Jun

120,000 bpd
Exports in Apr-Jun

9% of India's exports

6,763
Petrol pumps (in no.)

7% of total petrol pumps in India

bpd: Barrels per day
Source: Nayara and Oil ministry data

According to a *Bloomberg* report, the government hasn't given oil refiners instructions to stop buying Russian oil, according to people familiar, as officials grapple with meeting energy needs and maintaining ties with Moscow without further angering Trump.

Exports hurt

The only casualty for now is the export of fuels by Nayara. The impact on export in July was minimal, with outward shipment declining by only around 10 per cent to 96,000 barrels per day (bpd) in July from June, according to the data from maritime intelligence agency Kpler.

Nayara exported around 127,000 bpd, valued at around $4.5 billion or so, in the entire calendar year 2024, according to approximate calculations based on the data of Kpler and Indian customs.

The loss after the EU sanctions may have been only a few million dollars, industry officials said. No product tanker loaded fuels from the Vadinar refinery since July 21, three days after the sanctions kicked in, according to the ship-tracking data.

Supply options

Two Singapore-based trading analysts said Nayara might explore options of routing export via countries like Dubai because its buyers are unable to make payments to a sanctioned entity.

Traders are working on options to swap large amounts of Indian-made diesel and jet fuel for more West Asian production to keep fuel flowing, said Energy Intelligence, based in the United Kingdom.

A senior trader from a state refiner said Nayara had an option to route diesel and jet fuel through public-sector refiners, for which they would charge a margin. It is not clear if Nayara has approached a state refiner with a firm deal. Barring liquefied petroleum gas, state-run refiners are free to export transport fuels after keeping the domestic market well supplied, he added.

In the immediate term, Nayara has trimmed refining amid storage constraints at the refinery in the absence of export loadings, industry officials said.

Nayara declined requests for comment. Rosneft, however, said in a statement that EU sanctions "violate international law and infringe on the economic interests of a sovereign state". "Nayara Energy is an Indian legal entity whose operations support the development of its assets," Rosneft said.

MINT, Delhi, 4.8.2025
Page No. 1, Size:(7.45)cms X (20.64)cms.

Oil marketers in talks with US LPG cos for supplies from '26

Rituraj Baruah & Dhirendra Kumar

NEW DELHI

India's state-run oil marketers are in joint discussions with US firms to secure cooking gas supplies beginning next year, three people aware of the development said, indicating a potential deepening of energy ties. The companies—Indian Oil Corp. Ltd, Bharat Petroleum Corp. Ltd and Hindustan Petroleum Corp. Ltd—are likely to sign near-identical contracts with the selected partners, the people said on the condition of anonymity.

The negotiations, happening against the backdrop of the US tariff on Indian goods, support the target set by both countries earlier this year to increase their energy trade to $20 billion.

"Indian OMCs are in talks, collectively, with at least a dozen LPG suppliers in the US. The negotiations are for supplies starting January next year, and the discussions are progressing well," one of the three people cited above said.

The person added that although deals may be signed separately, given that talks are happening at a combined level, the nature of deals would be largely the same.

Some of the major American LPG suppliers are Texas-headquartered Targa Resources and Enterprise Products and Oklahoma-headquartered ONEOK. Queries emailed to the Union ministries of petroleum and commerce, the Indian oil marketing companies, and the US LPG suppliers

TURN TO PAGE 8

MINT, Delhi, 4.8.2025
Page No. 1, Size:(7.45)cms X (20.64)cms.

Oil marketers tap US LPG firms for supplies from '26

FROM PAGE 1

went unanswered.

India traditionally imports most of its LPG from West Asia including Qatar, the UAE and Saudi Arabia through long-term contracts, while other major LPG importing countries source it from the US. The US so far has been supplying India LPG in small volumes through spot deals.

The talks with the US firms is seen as indicating a thaw in ties between the two, even as talks on the Bilateral Trade Agreement remain active but are stuck on intractable issues such as dairy and agriculture.

"India is a huge importer of LPG. US is a large producer of LPG which is produced as natural gas liquids along with shale gas. So, US can be a significant supplier of LPG to India," said Prashant Vasisht, senior vice president and co-group head, corporate ratings, ICRA Ltd. He added the price of LPG won't be very different and will be competitive compared to the West Asian LPG on a landed basis in India.

LPG used in India comprises 60% butane and 40% propane. West Asian exports are better suited for this as they are primarily butane-dominated, since their LPG production is a byproduct of oil processing. On the other hand, US supplies are primarily propane-dominated, as US LPG production is the byproduct of natural gas processing.

"India may source the required propane from the US, which would be 40-50% of the composition and the butane may continued to be imported from the Gulf countries," an industry executive said on the condition of anonymity

In India, LPG is used primarily for residential cooking. MINT

India imported LPG worth $12.47 billion in FY25, 19.85% higher than $10.42 billion the previous year

Ajay Srivastava, former Indian Trade Service officer and founder of the Global Trade Research Initiative (GTRI), said, "Those engaging with US oil firms for the deal should ensure certainty of supply and competitive pricing, as the US has overcommitted to supplying oil and gas to various countries, but currently lacks adequate production of petroleum products and LNG. The contract must guarantee supply certainty and include penalties for failure to deliver on time."

In a bid to diversify import sources amid geopolitical tensions and regional instability in West Asia, Indian buyers have been forging new ties.

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For an extended version of this story, go to livemint.com.

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The US so far has been supplying India LPG in small volumes via spot deals. MINT

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In a bid to diversify import sources amid geopolitical tensions and regional instability in West Asia, Indian buyers have been forging new ties.

BUSINESS STANDARD, Delhi, 4.8.2025
Page No. 8, Size:(25.03)cms X (22.66)cms.

Opec+ agrees to another large output hike in Sep

To add 547,000 bpd, completing reversal of 2.2 mn-barrel cutback in '23

BLOOMBERG
3 August

Opec+ agreed on another bumper oil production increase for September, completing its current tranche of supply revival one year early, and indicated it may consider reviewing the next layer of cuts.

Saudi Arabia and its partners agreed on a video conference to add 547,000 barrels a day next month. This completes the reversal of a 2.2 million-barrel cutback made by eight members in 2023, and also includes an extra allowance being phased in by the United Arab Emirates. The call lasted just 16 minutes, one of the delegates said.

The group will keep its options open to reassess plans for another layer of about 1.66 million barrels of halted output, three of the delegates said, but emphasised that no decision has been made and that any moves will be determined by the market situation. They've scheduled a follow-up meeting for September 7. The latest hike caps a dramatic shift from the Organization of the Petroleum Exporting Countries and its partners from defending prices to opening the taps in a move to reclaim market share. Their pivot has helped put a lid on oil and gasoline futures in the face of geopolitical tensions and strong seasonal demand, offering some relief for drivers and a win for US President Donald Trump, but the accelerated increases are helping to fuel expectations for a global supply surplus later in the year.

Group will keep options open to reassess plans for another layer of 1.66 million barrels of halted output

The brevity of Sunday's call showed that the group is united in its strategy, a senior Opec delegate said.

"What many feared would crash prices and test internal cohesion has so far been a smooth and orderly return," said Jorge Leon, an analyst at Rystad Energy A/S who previously worked at the Opec secretariat. Sunday's decision also comes as Trump intensifies diplomatic pressure on Opec+ co-leader Russia.

A disruption to Russian flows would threaten to drive up crude prices and run counter to Trump's repeated call for cheaper oil, as he pushes the Federal Reserve to lower interest rates.

The alliance has followed with a series of bumper monthly increases, and sped up even further in July, as it sought to capitalise on strong summer demand.

"In view of a steady global economic outlook and current healthy market fundamentals, as reflected in the low oil inventories," Opec said in a statement on Sunday. Opec+ officials have offered a range of explanations for the accelerated supply revival, from punishing the group's over-producing members to placating Trump.

People familiar with the matter have said Saudi Arabia's main objective is to recoup the market share Opec+ has ceded to rivals like US shale drillers during years of output cutbacks.

TIMES OF INDIA, Delhi, 4.8.2025
Page No. 15, Size:(4.41)cms X (5.29)cms.

Opec+ agrees to raise output again

London: Opec+ agreed on Sunday to raise oil production by 547,000 barrels per day for Sept, the latest in a series of accelerated output hikes to regain market share, as concerns mount over potential supply disruptions linked to Russia. The move marks a full and early reversal of Opec+'s largest tranche of output cuts. REUTERS

MILLENNIUM POST, Delhi, 4.8.2025
Page No. 10, Size:(17.18)cms X (9.72)cms.

OPEC+ agrees to raise output by 547,000 bpd for Sept

In a statement, OPEC+ cited a healthy economy and low stocks as reasons behind its decision

LONDON: OPEC+ agreed on Sunday to raise oil production by 547,000 barrels per day (bpd) for September, the latest in a series of accelerated output hikes to regain market share, as concerns mount over potential supply disruptions linked to Russia, *Reuters* reported.

The move marks a full and early reversal of OPEC+'s largest tranche of output cuts plus a separate increase in output for the United Arab Emirates amounting to about 2.5 million bpd, or about 2.4 per cent of world demand.

Eight OPEC+ members held a brief virtual meeting, amid increasing US pressure on India to halt Russian oil purchases - part of Washington's efforts to bring Moscow to the negotiating table for a peace deal with Ukraine. President Donald Trump said he wants this by August 8.

In a statement following the meeting, OPEC+ cited a healthy economy and low stocks as reasons behind its decision.

Oil prices have remained elevated even as OPEC+ has raised output, with Brent crude closing near $70 a barrel on Friday, up from a 2025 low of near $58 in April, supported in part by rising seasonal demand.

"Given fairly strong oil prices at around $70, it does give OPEC+ some confidence about market fundamentals," said Amrita Sen, co-founder of Energy Aspects, adding that the market structure was also indicating tight stocks. The eight countries are scheduled to meet again on September 7, when they may consider reinstating another layer of output cuts totalling around 1.65 million bpd, two OPEC+ sources said following Sunday's meeting. Those cuts are currently in place until the end of next year.

The group, which pumps about half of the world's oil, had been curtailing production for several years to support oil prices. It reversed course this year in a bid to regain market share, spurred in part by calls from Trump for OPEC to ramp up production.

The eight began raising output in April with a modest hike of 138,000 bpd, followed by larger-than-planned hikes of 411,000 bpd in May, June and July, 548,000 bpd in August and now 547,000 bpd for September.

"So far the market has been able to absorb very well those additional barrels also due to stockpiliing activity in China," said Giovanni Staunovo of UBS. "All eyes will now shift on the Trump decision on Russia this Friday."

As well as the voluntary cut of about 1.65 million bpd from the eight members, OPEC+ still has a 2-million-bpd cut across all members, which also expires at the end of 2026. "OPEC+ has passed the first test," said Jorge Leon of Rystad Energy and a former OPEC official, as it has fully reversed its largest cut without crashing prices.

"But the next task will be even harder: deciding if and when to unwind the remaining 1.66 million barrels, all while navigating geopolitical tension and preserving cohesion." AGENCIES

REUTERS

Opec+ hikes oil output again in market share push

The move marks a full and early reversal of the bloc's largest tranche of production cuts

Reuters
feedback@livemint.com
LONDON

The Organization of the Petroleum Exporting Countries and its allies (Opec+) agreed on Sunday to raise oil production by 547,000 barrels per day for September, the latest in a series of accelerated output hikes to regain market share, as concerns mount over potential supply disruptions linked to Russia.

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Opec+ in full includes 10 non-Opec oil producing countries, most notably Russia and Kazakhstan.

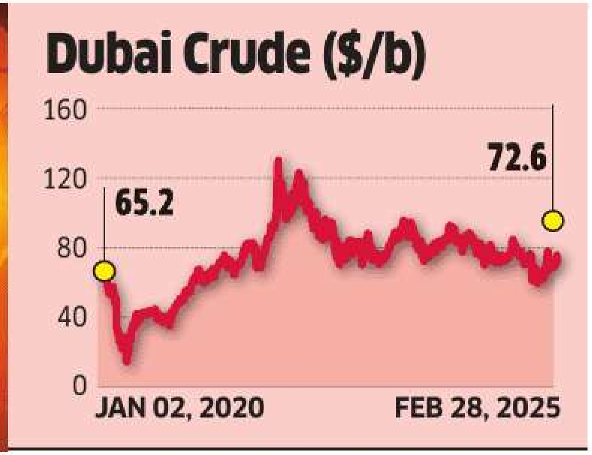
The group, which pumps about half of the world's oil, had been curtailing production for several years to support oil prices. It reversed course this year in a bid to regain market share, spurred in part by calls from Trump for Opec to ramp up production.

ECONOMIC TIMES, Mumbai, 4.8.2025
Page No. 13, Size:(19.87)cms X (12.50)cms.

OPEC+ Makes Another Large Oil Output Hike in Market Share Push

Move comes amid supply disruption concerns, Trump's pressure on India to halt purchases from Russia

Reuters



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The eight began raising output in April with a modest hike of 138,000 bpd, followed by larger-than-planned hikes of 411,000 bpd in May, June and July, 548,000 bpd in August and now 547,000 bpd for September. Oil prices have nonetheless remained elevated with Brent crude closing near $70 a barrel on Friday, up from a 2025 low of near $58 in April, supported by part by rising seasonal demand. As well as the voluntary cut of about 1.65 million bpd from the eight members, OPEC+ still has a 2-million-bpd cut across all members, which also expires at end of 2026.

EIGHT COUNTRIES TO HIKE SEPT PRODUCTION

OPEC+ makes another large output increase

BLOOMBERG
August 3

OPEC+ AGREED on another bumper oil production increase for September, completing its current tranche of supply revival one year early, and indicated it may consider reviewing the next layer of cuts.

Saudi Arabia and its partners agreed on a video conference to add 547,000 barrels a day next month. This completes the reversal of a 2.2 million-barrel cutback made by eight members in 2023, and also includes an extra allowance being phased in by the United Arab Emirates. The call lasted just 16 minutes, one of the delegates said.

The group will keep its options open to reassess plans for another layer of about 1.66 million barrels of halted output, three of the delegates said, but emphasised that no decision has been made and that any moves will be determined by the market situation. They've scheduled a follow-up meeting for September 7.

The latest hike caps a dramatic shift from the Organization of the Petroleum Exporting Countries and its partners from defending prices to opening the taps in a move to reclaim market share. Their pivot has helped put a lid on oil and gasoline futures in the face of geopolitical tensions and strong seasonal demand, offering some relief for drivers and a win for US President Donald Trump, but the accelerated increases are helping to fuel expectations for a global supply surplus later in the year.

The brevity of Sunday's call showed that the group is united in its strategy, a senior OPEC delegate said. The alliance maintains flexibility to meet at any time and also has the ability to pause increases or reduce output if the market required, they said. "What many feared would crash prices and test internal cohesion has so far been a smooth and orderly return," said Jorge Leon, an analyst at Rystad Energy A/S who previously worked at the OPEC secretariat. "But the group is still threading a fine needle. Will it move to unwind the remaining 1.66 million barrels per day to defend market share?"

Sunday's decision also comes as President Trump intensifies diplomatic pressure on OPEC+ co-leader Russia. Trump has threatened Moscow with secondary tariffs on its oil customers unless there is a swift ceasefire in the war in Ukraine.

BLOOMBERG

PLENTIFUL

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- He has threatened Moscow with secondary tariffs unless there is a swift ceasefire with Ukraine

BUSINESS STANDARD, Delhi, 4.8.2025
Page No. 4, Size:(12.24)cms X (29.55)cms.

Penalty on Russian crude may add up to $11 bn to import bill

PRESS TRUST OF INDIA
New Delhi, 3 August

India's annual oil import bill could rise by $9-11 billion if the country is compelled to move away from Russian crude oil in response to the United States (US) threats of additional tariffs or penalties on Indian exports, analysts said.

India, the world's third-largest oil consumer and importer, has reaped significant benefits by swiftly substituting market-priced oil with discounted Russian crude following Western sanctions on Moscow after its invasion of Ukraine in February 2022.

Russian oil, which accounted for less than 0.2 per cent of India's imports before the war, now makes up 35-40 per cent of the country's crude intake, helping reduce overall energy import costs, keep retail fuel prices in check, and contain inflation.

The influx of discounted Russian crude also enabled India to refine the oil and export petroleum products, including to countries that have imposed sanctions on direct imports from Russia. The twin strategy of Indian oil companies is posting record profits.

RUSSIAN OIL WAS LESS THAN 0.2% OF INDIA'S TOTAL IMPORTS BEFORE THE UKRAINE WAR. NOW IT MAKES UP 35-40% OF THE INTAKE

This is, however, now under threat after US President Donald Trump announced a 25 per cent tariff on Indian goods plus an unspecified penalty for buying Russian oil and weapons. The 25 per cent tariff has since been notified but the penalty is yet to be specified.

Coming within days of the European Union banning imports of refined products derived from Russian-origin crude, this presents a double whammy for Indian refiners.

Sumit Ritolia, Lead Research Analyst (Refining & Modeling) at global real-time data and analytics provider Kpler termed this as "a squeeze from both ends".

EU sanctions — effective from January 2026 — may force Indian refiners to segment crude intake on one side, and on the other, the US tariff threat raises the possibility of secondary sanctions that would directly hit the shipping, insurance, and financing lifelines underpinning India's Russian oil trade.

"Together, these measures sharply curtail India's crude procurement flexibility, raise compliance risk, and introduce significant cost uncertainty," he said.

MILLENNIUM POST, Delhi, 4.8.2025
Page No. 10, Size:(17.38)cms X (16.35)cms.

US penalty risk on Russian oil may add $9-11 bn to India's import bill

India, world's 3rd-largest oil consumer & importer, has reaped significant benefits by substituting market-priced oil with discounted Russian crude

OUR CORRESPONDENT

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Key Points

- Influx of discounted Russian crude also enabled India to refine oil & export petroleum products, to countries that have imposed sanctions on direct imports from Russia
- The twin strategy of Indian oil companies is posting record profits
- For Reliance Industries & Nayara Energy - who collectively account for over 50% in 2025) of the 1.7–2.0 million bpd of Russian crude imports - the challenge is acute

"Together, these measures sharply curtail India's crude procurement flexibility, raise compliance risk, and introduce significant cost uncertainty," he said.

Last fiscal, India spent over $137 billion on import of crude oil, which is refined into fuels like petrol and diesel.

For refiners like Reliance Industries Ltd and Nayara Energy - who collectively account for a bulk (more than 50 per cent in 2025) of the 1.7–2.0 million barrels per day (bpd) of Russian crude imports into India - the challenge is acute.

While Nayara is backed by Russian oil giant Rosneft and has been sanctioned by the EU last month, Reliance has been a big fuel exporter to Europe.

As one of the world's largest diesel exporters - and with total refined product exports to Europe averaging around 200,000 bpd in 2024 and 185,000 bpd so far in 2025 - Reliance has extensively utilised discounted Russian crude to boost refining margins over the past two years, according to Kpler.

"The introduction of strict origin-tracking requirements now compels Reliance to either curtail its intake of Russian feedstock, potentially affecting cost competitiveness, or reroute Russian-linked products to non-EU markets," Ritolia said.

However, Reliance's dual-refinery structure - a domestic-focused unit and an export-oriented complex - offers strategic flexibility. It can allocate non-Russian crude to its export-oriented refinery and continue meeting EU compliance standards, while processing Russian barrels at the domestic unit for other markets.

PIONEER, Delhi, 4.8.2025
Page No. 10, Size:(0.08)cms X (0.08)cms.

US penalty risk on Russian oil may cost India $9–11 Billion

PIONEER NEWS SERVICE
New Delhi

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The influx of discounted Russian crude also enabled India to refine the oil and export petroleum products

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However, Reliance's dual-refinery structure - a domestic-focused unit and an export-oriented complex - offers strategic flexibility. It can allocate non-Russian crude to its export-oriented refinery and continue meeting EU compliance standards, while processing Russian barrels at the domestic unit for other markets.

Although redirecting diesel exports to Southeast Asia, Africa, or Latin America is operationally feasible, such a shift would involve narrower margins, longer voyage times, and increased demand variability, making it commercially less optimal, he said.

Kpler data shows a notable decline in India's Russian crude imports in July (1.8 million bpd versus 2.1 million bpd in June), aligning with seasonal refinery maintenance and weaker monsoon-driven demand.

However, the drop is more pronounced among state-run refiners, likely reflecting heightened compliance sensitivity amid mounting geo political risk.

Private refiners, who account for over 50 per cent of Russian crude intake, have also begun reducing exposure, with fresh procurement diversification underway this week as concerns over US sanctions intensify.

Ritolia said replacing Russian crude isn't plug-and-play. The Middle East is the logical fallback, but has constraints - contractual lock-in, pricing rigidity, and a mismatch in crude quality that affects product yield and refinery configuration.

"The risk here is not just supply but profitability. Refiners will face higher feedstock costs, and in the case of complex units optimised for (Russian) Urals-like blends, even margins will be under pressure," he said.

On the future course, Kpler believes India's complex private refiners — backed by robust trading arms and flexible configurations — are expected to pivot toward non-Russian barrels from the Middle East, West Africa, Latin America, or even the US, where economics permits.

This shift, while operationally feasible, will be gradual and strategically aligned with evolving regulatory frameworks, contract structures, and margin dynamics.

However, replacing Russian barrels in full is no easy feat - logistically daunting, economically painful, and geopolitically fraught. Supply substitution may be feasible on paper, but remains fraught in practice.

"Financially, the implications are massive. Assuming a $5 per barrel discount lost across 1.8 million bpd, India could see its import bill swell by $9–11 Billion annually. If global flat prices rise further due to reduced Russian availability, the cost could be higher," it said.

This would increase fiscal strain, particularly if the government steps in to stabilise retail fuel prices.

The cascading impact on inflation, currency, and monetary policy would be difficult to ignore.

VIRAT VAIBHAV, Delhi, 4.8.2025
Page No. 15, Size:(16.81)cms X (21.56)cms.

आईबीए का सरकार से सीबीजी संयंत्रों के लिए रियायती बिजली शुल्क का आग्रह

एजेंसी ■ नई दिल्ली

भारतीय बायोगैस एसोसिएशन (आईबीए) ने स्वच्छ ऊर्जा परिवर्तन को बढ़ावा देने के लिए पेट्रोलियम और प्राकृतिक गैस मंत्रालय से संपीड़ित बायोगैस (सीबीजी) संयंत्रों के लिए रियायती बिजली शुल्क का आग्रह किया है।

आईबीए ने एक बयान में कहा कि मंत्रालय को दिए गए एक व्यापक निवेदन में कहा गया कि बिजली की लागत एक महत्वपूर्ण परिचालन व्यय है, जो कुल परिचालन व्यय का औसतन 30 प्रतिशत है। बयान के अनुसार, आईबीए ने सुझाव दिया है कि सरकार को सीबीजी संयंत्रों को रियायती बिजली दरें प्रदान करनी चाहिए, जो उच्च औद्योगिक बिजली शुल्क के कारण नुकसान में हैं, जो उनकी परिचालन लागत का 48 प्रतिशत है। एसोसिएशन के विस्तृत लागत अध्ययन से पता चलता है कि सात रुपए प्रति किलोवाट घंटे की औसत औद्योगिक दर पर, वाणिज्यिक स्तर के सीबीजी संयंत्रों की कुल परिचालन लागत में बिजली का हिस्सा काफी अधिक होता है, जैसे धान के भूसे पर आधारित संयंत्रों में 34 प्रतिशत, प्रेस मड आधारित संयंत्रों में 28 प्रतिशत, गोबर आधारित संयंत्रों में 19 प्रतिशत और नगरपालिका ठोस अपशिष्ट (एमएसडब्ल्यू) आधारित संयंत्रों में यह 48 प्रतिशत तक होता है।

आईबीए के चेयरमैन गौरव केडिया ने कहा, सीबीजी उद्योग सीओपी26 में घोषित भारत की पंचामृत प्रतिबद्धताओं को प्राप्त करने में एक महत्वपूर्ण भूमिका निभाता है। सीबीजी संयंत्रों के लिए बिजली की लागत का बोझ कम करके, हम 2030 तक अपने 50 प्रतिशत गैर-जीवाश्म ऊर्जा संक्रमण को आगे बढ़ा सकते हैं और 2070 तक अपने शुद्ध शून्य उत्सर्जन लक्ष्य को प्राप्त कर सकते हैं।

AMAR UJALA, Delhi, 4.8.2025
Page No. 12, Size:(13.14)cms X (6.16)cms.

अनदेखी

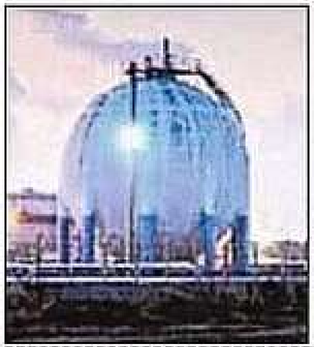
दुनिया ऊर्जा के लिए जूझ रही, तब 17 वर्षों के रिकॉर्ड स्तर पर पहुंची गैस फ्लेरिंग

प्राकृतिक गैस की बर्बादी ऊर्जा का अपव्यय, जलवायु पर संकट

अमर उजाला नेटवर्क

नई दिल्ली। एक ओर जब दुनिया के करोड़ों लोग ऊर्जा की मूलभूत सुविधाओं से वंचित हैं तो दूसरी ओर गैस फ्लेरिंग, अर्थात तेल उत्पादन के दौरान निकलने वाली प्राकृतिक गैस को जलाकर बर्बाद करना, 2024 में अपने 17 वर्षों के उच्चतम स्तर पर पहुंच गई।

वर्ल्ड बैंक की नई रिपोर्ट 'ग्लोबल गैस फ्लेरिंग ट्रैकर 2025' के अनुसार बीते वर्ष 151 अरब घन मीटर गैस फ्लेयर की गई, जिससे 38.9 करोड़ टन कार्बन डाइऑक्साइड के बराबर ग्रीनहाउस गैसों का उत्सर्जन हुआ। इस स्तर की गैस फ्लेरिंग न केवल जलवायु परिवर्तन को भड़काने वाली है, बल्कि वैश्विक ऊर्जा असमानता को भी और गहरा करती है। 2000 के दशक की शुरुआत में जो सुधार की उम्मीद दिख रही थी, अब वह रुक सी गई है। यह दरअसल तकनीक और नीति की असफलता का प्रतीक है। 2024 में हुई कुल गैस फ्लेरिंग का 76% हिस्सा केवल 9 देशों से आया। रूस, ईरान, इराक, अमेरिका, वेनेजुएला, अल्जीरिया, लीबिया, मैक्सिको और नाइजीरिया। रूस, ईरान और इराक मिलकर कुल फ्लेरिंग का 46% हिस्सा करते हैं। रूस और ईरान में फ्लेरिंग में लगातार वृद्धि देखी गई है। अमेरिका में फ्लेरिंग इंटेंसिटी में 50% की कमी हुई है, जो अब दुनिया में सबसे कम है। 2012 में इन 9 देशों की संयुक्त हिस्सेदारी 65% थी, जो अब बढ़कर 76% हो चुकी है। यह दर्शाता है कि वैश्विक स्तर पर समस्या कुछ ही देशों में केंद्रित होती जा रही है।



वर्ल्ड बैंक ने दिखाई राह, नीतिगत बदलाव लाए असर

वर्ल्ड बैंक की पहल से जुड़े देशों ने 2012 से अब तक फ्लेरिंग इंटेंसिटी में औसतन 12% की गिरावट दर्ज की है, जबकि गैर-सदस्य देशों में यह 25% बढ़ी है। इनमें ब्राजील, कोलंबिया, मिस्र, इंडोनेशिया, कजाकिस्तान जैसे देशों ने न केवल गैस फ्लेरिंग घटाई बल्कि इसे ऊर्जा, रोजगार और सतत विकास में तब्दील करने की दिशा में भी कार्य किया है।

मीथेन अदृश्य लेकिन खतरनाक : रिपोर्ट के सबसे चौंकाने वाले आंकड़ों में शामिल है गैस फ्लेरिंग से निकली 4.6 करोड़ टन मीथेन गैस, जो कार्बन डाइऑक्साइड से कई गुना अधिक शक्तिशाली ग्रीनहाउस गैस है। इसकी मौजूदगी तापमान वृद्धि को और तीव्र बनाती है। साथ ही यह स्थानीय प्रदूषण बढ़ाकर मानव स्वास्थ्य पर सीधा असर डालती है।

ऊर्जा का अपव्यय नहीं अवसर का दोहन चाहिए

गैस फ्लेरिंग एक तकनीकी या आर्थिक चुनौती नहीं, नीतिगत इच्छा शक्ति की परीक्षा है। यदि सरकारें और कंपनियां संकल्प लें तो यह अपशिष्ट गैस आने वाले वर्षों में नवाचार और विकास का ईंधन बन सकती है। रिपोर्ट का निष्कर्ष साफ है। गैस फ्लेरिंग रोकी जा सकती है। इसके लिए चाहिए मजबूत पर्यावरण नीति, प्रभावी तकनीकी समाधान। अगर यह अपव्यय रोका जाए तो न केवल प्रदूषण घटेगा बल्कि ऊर्जा की उपलब्धता, रोजगार सृजन और स्थायी विकास के नए द्वार खुलेंगे।

VIRAT VAIBHAV, Delhi, 4.8.2025
Page No. 15, Size:(16.56)cms X (24.05)cms.

बीएसएनएल, नुमालीगढ़ रिफाइनरी में समझौता

एजेंसी ■ नई दिल्ली

सरकारी दूरसंचार कंपनी बीएसएनएल ने रिफाइनरी क्षेत्र में 5जी निजी नेटवर्क की तैनाती के लिए सार्वजनिक क्षेत्र की कंपनी नुमालीगढ़ रिफाइनरी लिमिटेड के साथ एक समझौते पर हस्ताक्षर किए हैं। रविवार को एक आधिकारिक बयान में यह जानकारी दी गई। गुवाहाटी में वित्त मंत्रालय के तत्वावधान में आयोजित सीपीएसई के लिए उद्योग 4.0 कार्यशाला के दौरान दोनों कंपनियों के बीच समझौता ज्ञापन पर हस्ताक्षर किए गए। बयान के अनुसार, इस समझौता ज्ञापन के तहत, बीएसएनएल और एनआरएल रिफाइनरी क्षेत्र में भारत का पहला 5जी सीएनपीएन (कैप्टिव नॉन-पब्लिक नेटवर्क) स्थापित करने के लिए सहयोग करेंगे, जिससे सुरक्षित, अति-विश्वसनीय और तत्काल औद्योगिक संपर्क का एक नया युग शुरू होगा। यह पहल मिशन-महत्वपूर्ण संचालन के लिए स्वदेशी 5जी बुनियादी ढांचे का लाभ उठाने की दिशा में एक अग्रणी कदम है। बीएसएनएल ने अभी-अभी 4जी सेवा शुरू की है, लेकिन उसके पास 5जी सेवाओं के लिए इस्तेमाल किया जा सकने वाला स्पेक्ट्रम है। बयान में कहा गया है, बीएसएनएल और एनआरएल के बीच साझेदारी से अन्य औद्योगिक क्षेत्रों में भी अनुकरणीय मॉडलों के लिए मंच तैयार होने की उम्मीद है। बीएसएनएल के चेयरमैन और प्रबंध निदेशक (सीएमडी) ए रॉबर्ट जे रवि ने कहा कि यह साझेदारी अगली पीढ़ी के डिजिटल बुनियादी ढांचे के साथ भारत के रणनीतिक क्षेत्रों को सशक्त बनाने की कंपनी की प्रतिबद्धता को दर्शाती है।

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भारत को घेर रहे अमेरिका-यूरोपीय संघ

कच्चे तेल का आयात बंद होने से बढ़ सकते हैं दाम

नई दिल्ली, (पंजाब केसरी) : अगर भारतीय निर्यात पर अतिरिक्त शुल्क या जुर्माना लगाने की अमेरिकी धमकियों से बचने के लिए भारत, रूस से कच्चे तेल का आयात बंद करता है, तो देश का वार्षिक तेल आयात बिल 9-11 अरब अमेरिकी डॉलर तक बढ़ सकता है। इससे देश में पैट्रोल, डीजल के दाम बढ़ सकते हैं। अभी तेल की कीमतें 80 डॉलर बैरल के आस-पास है। अगर यह बढ़ता है तो मजबूरी में उपभोक्ता कीमतों में बढ़ौतरी होगी और इससे देश में महंगाई का खतरा बढ़ जाएगा।

सरकार की कोशिशों से अभी तक महंगाई काबू में रही है लेकिन ऐसा होने से खाद्य वस्तुओं की कीमतों का असर पड़ सकता है। यूरोपीय यूनियन के प्रतिबंध और अमेरिका के शुल्क भारतीय रिफाइनरियों और तेल आयातकों को प्रभावित करेंगे। भारत दुनिया का तीसरा सबसे बड़ा तेल उपभोक्ता और आयातक है। फरवरी 2022 में रूस के यूक्रेन पर आक्रमण करने के बाद पश्चिमी देशों ने मास्को पर प्रतिबंध लगाए थे। इसके बाद भारत ने रूस से सस्ता तेल खरीदकर महत्वपूर्ण लाभ हासिल किया। हालांकि, अमेरिकी राष्ट्रपति डोनाल्ड ट्रंप के भारतीय वस्तुओं पर 25 प्रतिशत शुल्क और रूस से तेल एवं हथियार खरीदने पर जुर्माना लगाने की घोषणा के बाद अब हालात बदल गए हैं।

● दोतरफा 'दबाव' में कच्चे तेल का आयात दूसरे देशों से करना पड़ेगा तो आयात बिल में 9-11 अरब डॉलर की बढ़ौतरी होने की आशंका

अमेरिका ने 25 प्रतिशत शुल्क की अधिसूचना जारी कर दी है, लेकिन जुर्माने की राशि अभी तक घोषित नहीं की गई है। वैश्विक विश्लेषक केप्लर के प्रमुख शोध विश्लेषक सुमित रिटोलिया ने इसे 'दोतरफा दबाव' करार दिया। एक ओर यूरोपीय संघ के प्रतिबंध भारतीय रिफाइनरियों को प्रभावित करेंगे, वहीं दूसरी ओर अमेरिकी शुल्क का खतरा भारत के रूसी तेल व्यापार के आधारभूत ढांचे को प्रभावित करेगा। उन्होंने कहा कि ये सभी उपाय मिलकर भारत के कच्चे तेल की खरीद के लचीलेपन को कम करते हैं, अनुपालन जोखिम बढ़ाते हैं और लागत में भारी अनिश्चितता पैदा करते हैं।

केप्लर के आंकड़े जुलाई में भारत के रूसी कच्चे तेल के आयात में उल्लेखनीय गिरावट दर्शाते हैं (जून में 21 लाख बैरल प्रतिदिन की तुलना में 18 लाख बैरल प्रतिदिन)। हालांकि यह कमी कुछ हद तक नियमित रिफाइनरी रखरखाव और कमजोर मानसून प्रेरित मांग के चलते भी हो सकती है। यह गिरावट सरकारी रिफाइनरों के बीच ज्यादा स्पष्ट है। निजी रिफाइनरी भी खरीद में विविधता ला रही हैं।

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रिफाइनरियों को तेल आपूर्ति स्थिर

एस दिनकर
अमृतसर, 3 अगस्त

यूरोप और अमेरिका के प्रतिबंधों से बेअसर

- यूरोपीय संघ और डॉनल्ड ट्रंप के आक्रामक प्रतिबंधों के बीच नायरा और सरकारी रिफाइनरियों ने बनाए रखी आपूर्ति
- रूसी तेल की भारतीय खरीद पर प्रतिबंधों और शुल्क के बावजूद भारत के घरेलू ईंधन बाजार और कच्चे तेल का आयात फिलहाल बेअसर

रूस के तेल की खरीद पर यूरोपीय संघ के प्रतिबंधों और अमेरिकी राष्ट्रपति डॉनल्ड ट्रंप द्वारा द्वितीयक कर लगाए जाने की धमकी का अब तक भारत के घरेलू ईंधन बाजार और कच्चे तेल के आयात पर तुलनात्मक रूप से कोई असर नहीं पड़ा है।

रूस की रोसनेफ्ट द्वारा संचालित भारतीय तेलशोधन कंपनी नायरा एनर्जी ने यूरोपीय संघ के ताजा प्रतिबंधों के 18 दिन बाद भले ही अपना निर्यात बाजार अस्थायी रूप से गंवा दिया है और कंपनी को शीर्ष प्रबंधन में बदलाव करने पड़े हैं, लेकिन भारत के घरेलू ईंधन बाजार में आपूर्ति यथावत है।

अमृतसर के नजदीक छाबल रोड पर स्थित नायराएनर्जी के पेट्रोल पंप पर काम करने वाले कर्मचारी कार की टंकी भरते समय कंपनी की समस्याओं बेफिक्र और बेखबर नजर आए। उन्होंने बिज़नेस स्टैंडर्ड को बताया कि पेट्रोल और डीजल पर्याप्त उपलब्ध है और हाल के हफ्तों में कभी कोई कमी नहीं हुई। वह अगले दिन टैंकर से आउटलेट को फिर से भरने की उम्मीद कर रहे हैं।

तेल शोधन कंपनी की पश्चिमी तट पर 4,00,000 बैरल प्रति दिन क्षमता की रिफाइनरी है। इसमें रूस की सरकारी कंपनी रोसनेफ्ट की 49.13 प्रतिशत हिस्सेदारी है, जिसे यूरोपीय संघ ने 18 जुलाई को निशाने पर लेते हुए कई प्रतिबंध लगा दिए, जिससे रूस का यूक्रेन में हस्तक्षेप रोका जा सके।

सरकारी रिफाइनरियों के अधिकारियों ने कहा कि नायरा स्थानीय रिफाइनरियों को भी आपूर्ति जारी रखे है। रिफाइनिंग अधिकारियों ने कहा कि यूरोपीय संघ के प्रतिबंध और उसके बाद ट्रंप द्वारा द्वितीयक शुल्क लगाने के बाद भी भारत का घरेलू ईंधन बाजार और कच्चे तेल का आयात अपेक्षाकृत अप्रभावित है।

भारत ने नायरापर कोई टिप्पणी नहीं की है। विदेश मंत्रालय ने शुक्रवार को कहा कि ऊर्जा जरूरतों के मुताबिक हम उसके स्रोतों की तलाश करेंगे कि बाजार में क्या उपलब्ध है और किस तरह की पेशकश की जा रही है और वैश्विक स्थिति कैसी है। नायरा पर एकमात्र असर उसके निर्यात के मामले में है। मैरीटाइम इंटेलिजेंस एजेंसी केप्लर के आंकड़ों के मुताबिक जुलाई में निर्यात पर मामूली असर रहा और जून की तुलना में निर्यात करीब 10 प्रतिशत कम होकर 96,000 बैरल प्रति दिन रह गया। केप्लर और भारत के सीमा शुल्क के आंकड़ों के मुताबिक गणना करने से पता चलता है कि नायरा ने 2024 में 1,20,000 बीपीडी ईंधन का निर्यात किया, जिसका मूल्य करीब 2 अरब डॉलर था।

उद्योग से जुड़े अधिकारियों ने कहा कि निर्यात में नुकसान केवल कुछ लाख डॉलर का हो सकता है। शिप ट्रैकिंग डेटा के अनुसार यूरोपीय संघ के प्रतिबंध लगने के 3 दिन बाद से वडीनार रिफाइनरी से किसी भी उत्पाद टैंकर ने ईंधन नहीं भरा है।

उद्योग सूत्रों ने कहा कि विटोल, ट्रेफिगुरा, शेल या बीपी जैसे बड़े तेल व्यापारियों के यूरोप में हित हैं और वे यूरोपीय संघ द्वारा प्रतिबंधित संस्थाओं के साथ सौदा नहीं करते हैं।

सिंगापुर स्थित दो व्यापारिक विश्लेषकों ने कहा कि नायरादुबई जैसे देशों के रास्ते निर्यात करने के विकल्प तलाश सकती है, क्योंकि उसके खरीदार प्रतिबंधित संस्था को भुगतान करने में असमर्थ हैं। ब्रिटेन के एक एनर्जी इंटेलिजेंस ने बताया कि व्यापारी ईंधन की आपूर्ति जारी रखने के लिए भारत में निर्मित डीजल और जेट ईंधन की बड़ी मात्रा को पश्चिम एशियाई उत्पादन से बदलने के विकल्पों पर काम कर रहे हैं।

9-11 अरब डॉलर तक बढ़ सकता है भारत का आयात बिल

अगर भारतीय निर्यात पर अतिरिक्त शुल्क या जुर्माना लगाने की अमेरिकी धमकियों से बचने के लिए भारत, रूस से कच्चे तेल का आयात बंद करता है, तो देश का वार्षिक तेल आयात बिल 9-11 अरब डॉलर तक बढ़ सकता है। विश्लेषकों ने यह अनुमान जताया। भारत दुनिया का तीसरा सबसे बड़ा तेल उपभोक्ता और आयातक है। फरवरी 2022 में रूस के यूक्रेन पर आक्रमण करने के बाद पश्चिमी देशों ने मास्को पर प्रतिबंध लगाए थे। इसके बाद भारत ने रूस से सस्ता तेल खरीदकर महत्त्वपूर्ण लाभ हासिल किया।

अमेरिका ने 25 प्रतिशत शुल्क की अधिसूचना जारी कर दी है, लेकिन जुर्माने की राशि अभी तक घोषित नहीं की गई है। वैश्विक विश्लेषक केप्लर के प्रमुख शोध विश्लेषक सुमित रिटोलिया ने इसे 'दोतरफा दबाव' करार दिया। एक ओर यूरोपीय संघ के प्रतिबंध भारतीय रिफाइनरियों को प्रभावित करेंगे, वहीं दूसरी ओर अमेरिकी शुल्क का खतरा भारत के रूसी तेल व्यापार के आधारभूत ढांचे को प्रभावित करेगा। उन्होंने कहा, 'ये सभी उपाय मिलकर भारत के कच्चे तेल की खरीद के लचीलेपन को कम करते हैं, अनुपालन जोखिम बढ़ाते हैं और लागत में भारी अनिश्चितता पैदा करते हैं।' *भाषा*

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रिफाइनरी क्षेत्र में 5जी निजी नेटवर्क पर करार

नई दिल्ली। बीएसएनएल ने रिफाइनरी क्षेत्र में 5जी निजी नेटवर्क की तैनाती के लिए सार्वजनिक क्षेत्र की कंपनी रिफाइनरी लिमिटेड से समझौता किया। रविवार को यह जानकारी दी गई। समझौते के तहत, बीएसएनएल और एनआरएल रिफाइनरी क्षेत्र में पहला 5जी सीएनपीएन स्थापित करने के लिए सहयोग करेंगे।

RASHTRIYA SAHARA, Delhi, 4.8.2025
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रूसी तेल पर अमेरिकी जुर्माने से बढ़ेगा भारत का आयात बिल

रूस से आयात बंद किया तो 11 अरब डालर तक बढ़ सकता है तेल आयात बिल

नई दिल्ली (भाषा)।

अगर भारतीय निर्यात पर अतिरिक्त शुल्क या जुर्माना लगाने की अमेरिकी धमकियों से बचने के लिए भारत, रूस से कच्चे तेल का आयात बंद करता है, तो देश का वार्षिक तेल आयात बिल 9-11 अरब अमेरिकी डॉलर तक बढ़ सकता है। विश्लेषकों ने यह अनुमान जताया।

भारत दुनिया का तीसरा सबसे बड़ा तेल उपभोक्ता और आयातक है। फरवरी 2022 में रूस के यूक्रेन पर आक्रमण करने के बाद पश्चिमी देशों ने मास्को पर प्रतिबंध लगाए थे। इसके बाद भारत ने रूस से सस्ता तेल खरीदकर महत्वपूर्ण लाभ हासिल किया। हालांकि, अमेरिकी राष्ट्रपति डोनाल्ड ट्रंप के भारतीय वस्तुओं पर 25 प्रतिशत शुल्क और रूस से तेल एवं हथियार खरीदने पर जुर्माना लगाने की घोषणा के बाद अब हालात बदल गए हैं।

अमेरिका ने 25 प्रतिशत शुल्क की अधिसूचना जारी कर दी है, लेकिन जुर्माने की राशि अभी तक घोषित नहीं की गई है। वैश्विक विश्लेषक केप्लर के प्रमुख शोध विश्लेषक सुमित रिटोलिया ने इसे 'दोतरफा दबाव' करार दिया।

एक ओर यूरोपीय संघ के प्रतिबंध भारतीय रिफाइनिरयों को प्रभावित करेंगे, वहीं दूसरी ओर अमेरिकी शुल्क का खतरा भारत के रूसी तेल व्यापार के आधारभूत ढांचे को प्रभावित करेगा। उन्होंने कहा, 'ये सभी उपाय मिलकर भारत के कच्चे तेल की खरीद के लचीलेपन को कम करते है, अनुपालन जोखिम बढ़ाते है और लागत में भारी अनिश्चितता पैदा करते है।'

केप्लर के आंकड़े जुलाई में भारत के रूसी कच्चे तेल के आयात में उल्लेखनीय गिरावट दर्शाते है (जून में 21 लाख बैरल प्रतिदिन की तुलना में 18 लाख बैरल प्रतिदिन)। हालांकि यह कमी कुछ हद तक नियमित रिफाइनरी रखरखाव और कमजोर मानसून प्रेरित मांग के चलते भी हो सकती है। यह गिरावट सरकारी रिफाइनरों के बीच ज्यादा स्पष्ट है। निजी रिफाइनरी भी खरीद में विविधता ला रही है।