

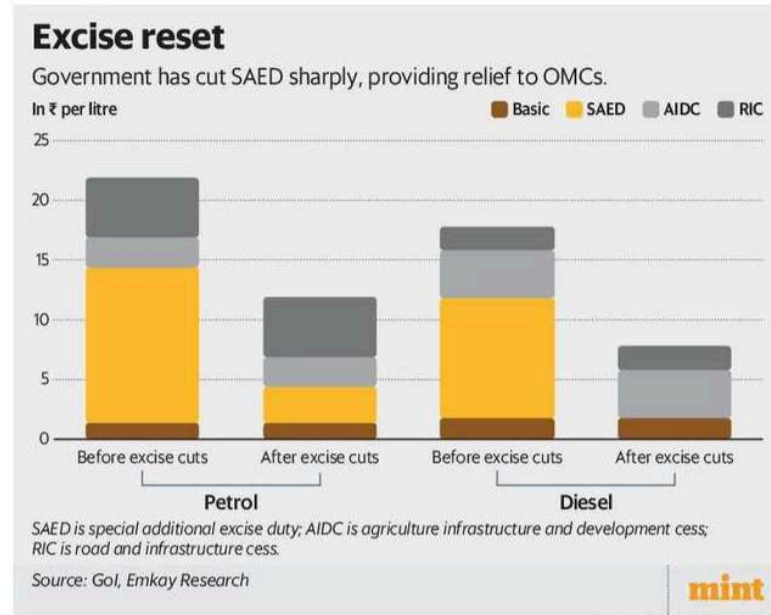
How excise cuts change oil math

Ananya Roy
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Despite Brent crude at \$115 a barrel, shares of oil marketing companies (OMCs) Indian Oil Corp. Ltd (IOCL), Hindustan Petroleum Corp. Ltd (HPCL), and Bharat Petroleum Corp. Ltd (BPCL) held up better than the broader market during Monday's selloff. Markets see the government's ₹10-per-litre excise duty cut from Friday as exactly what the doctor ordered for a sector starting at steep under-recoveries: ₹26 per litre and ₹82 per litre for petrol and diesel, respectively.

The policy move could cost the exchequer nearly ₹14,000 crore in revenue per month. But it has shifted the breakeven crude price for OMCs refining and retail operations from about \$90 a barrel earlier to roughly \$106 a barrel now if retail prices of petrol & diesel stay unchanged, said CareEdge Ratings. That is a decent cushion, given crude's jump from about \$70 to \$115 a barrel this month.

That said, exports, which had provided respite amid indirectly capped



domestic pump prices, have become less lucrative. Export duties of ₹21.5 a litre on diesel and ₹29.5 a litre on aviation turbine fuel (ATF) have been imposed to ensure domestic fuel availability, and partially offset revenue losses to the government. Reports suggest that Reliance's SEZ (special economic zone) refinery is

likely to be left out of the duty net. Its stock held up better than those of OMCs on Monday.

But all this just means the excise adjustment has only reduced OMCs' stress, not eliminated it. According to a report by JM Financial Institutional Securities, "at spot Brent of around \$111/bbl, OMCs auto-fuel integrated

gross margin is still -₹15/litre below historical level (at negative ₹2.5/litre versus historical average of positive ₹12.5/litre); this is likely to result in decrease in OMCs book value by 3.4% to 7% per month." Emkay Global Financial Services' estimates suggested OMCs' under-recoveries may have declined from ₹29-45 a litre to ₹17-28 a litre, but remain far from sustainable if crude stays elevated.

As special additional excise duties have been brought down to ₹3 a litre for petrol and nil for diesel, it leaves little room for further policy support. Agriculture infrastructure and development cess (AIDC) and road and infrastructure cess (RIC) can be reduced, but they are already low at ₹2-5 a litre.

OMCs had raised prices of bulk diesel and premium petrol earlier this month. But these constitute a small portion of their sales, with retail pump sales making up the lion's share. Retail fuel price hikes remain

an available lever, but only after state elections. The excise-cut safety valve has managed to buy the sector time, even as markets remain hopeful of a timely end to war-led crude spike.

Valuations for HPCL, BPCL and IOCL are trading near or below their recent historical averages, according to Motilal Oswal Financial Services' estimates, suggesting that much of the near-term stress may already be priced in.

The biggest structural beneficiaries of the policy shift are upstream oil companies. No windfall tax has been imposed on upstream producers, which strengthens earnings visibility for Oil and Natural Gas Corp. Ltd (ONGC) and Oil India Ltd

as higher crude prices aid realizations. While ONGC's subsidiary HPCL operates downstream, and Oil India too has downstream exposure through Numaligarh Refinery, their businesses are primarily upstream. ONGC stock was among the few patches of green on Monday.

THE WINNERS

NO windfall tax levied on upstream oil firms, boosting earnings visibility for ONGC, Oil India

HIGHER crude prices support realizations for these upstream oil companies

MANU CHOUDHARY/MINT



INDIA ADDS 3.1 L PNG CONNECTIONS IN MARCH: GOVT

**FC CORRESPONDENT
NEW DELHI, MARCH 31**

The oil ministry said that India added more than 3.1 lakh new piped natural gas (PNG) connections in March and another 2.7 lakh connections were issued, aiming to expand base of cleaner fuel networks due to supply disruptions following closure of Strait of Hormuz.

The government aims to meet the demand of cooking gas for households as well as commercial set-ups amid disruption of LPG supplies in the country amid West Asia war.

In February, India had 1.64 crore domestic PNG connections, 48,568 commercial and 21,512 industrial connections.

India bulks up Russia oil imports; Gulf flows ebb

SHUBHANGI MATHUR
New Delhi, 31 March

India's crude oil imports from Russia climbed to a nine-month high of 1.96 million barrels per day (bpd) in March, as flows from West Asia tightened amid the ongoing war between the US-Israel combine and Iran, according to data from maritime intelligence firm Kpler. This marks a sharp rise from 1.04 million bpd in February.

Furthermore, Angola has emerged as one of the biggest crude oil suppliers to India amid attempts to source from West Asian alternatives.

Refiners in India accelerated purchases of Russian crude through March after Washington granted a 30-day waiver allowing countries to buy oil and petroleum products from Moscow that had been stranded at sea. The waiver is in place until April 11.

Since December 2025, India had scaled back petroleum imports from Russia, largely in response to trade negotiations with Washington and an expanding regime of sanctions imposed on Moscow by the US and the European Union. In February, the US announced an interim trade agreement with India and lifted a 25 per cent additional tariff for Russian oil purchases, with American President Donald Trump asserting that New Delhi had committed to reducing such imports to zero.

Turn to Page 6 ▶



Crude scenario

India's crude oil imports ('000 barrels per day)

Major sources	Jan	Feb	March
Russia	1,091	1,042	1,960
Saudi Arabia	774	1,016	576
Angola	254	103	333
Iraq	1,017	969	240
UAE	396	554	207
US	297	216	167
West Asia*	2,708	3,047	1,259
Total	5,146	5,179	4,452

*includes supplies from Iraq, Saudi Arabia, UAE, Kuwait, Qatar and Oman
Note: Data until March 30, 2026; total includes supplies from other sources as well
Source: Kpler

DATANOMICS

4 ▶

Ethanol blending gains traction as reliance on oil imports persists

Gulf squeeze drives India's renewed pivot to Russia oil

That trajectory has now reversed. With global supplies constrained by the war in West Asia, Indian refiners are leaning heavily on Russian crude to maintain fuel availability at home. Indian companies, however, are now paying a premium of \$6-\$7 a barrel for Russian oil, compared with discounts of \$8-\$10 a barrel before the start of the conflict.

India remains one of the world's largest crude oil consumers, with import dependence reaching as high as 90 per cent amid rising demand and stagnant domestic production.

At the same time, shipments from key West Asian

suppliers have faltered. Imports from Iraq, Saudi Arabia and the United Arab Emirates have been disrupted as Iran continues to block vessel traffic through the Strait of Hormuz, a vital maritime chokepoint through which about 40 per cent of India's petroleum imports pass.

Data from Kpler shows that imports from Iraq fell by roughly 75 per cent to 240,000 bpd by March 30, down from 969,000 bpd in February. Supplies from Saudi Arabia declined by 43 per cent, though remained substantial at 576,000 bpd, compared with 1.01 million bpd a month earlier. To sustain exports, Saudi Arabia has

increased shipments via its East-West pipeline, bypassing the Strait of Hormuz.

Imports from the UAE also dropped sharply, to 207,000 bpd in March from 554,000 bpd in February. Elsewhere, India nearly trebled its pur-

chases from Angola to 333,000 bpd, while imports from the United States edged down to 167,000 bpd.

Overall, India's total crude imports fell to 4.45 million bpd in March, compared with 5.17 million bpd in February.

India may pivot to US as W. Asia conflict hits LPG availability

WAR IMPACT. Expected to increase share of LNG imports, already at a record high in 2025

Rishi Ranjan Kala
New Delhi

As the conflict in West Asia fuels uncertainty over the production and export of liquefied petroleum gas (LPG), India is expected to further increase its share of imports of natural gas liquids (NGLs) from the US, which is already at a record high in the last calendar year.

For instance, NGL exports from the US to India rose from a mere 2,000 barrels per day (b/d) in 2016 to an all-time high of 139,000 b/d last calendar year. NGLs are part of the same family of molecules as natural gas and crude oil. Ethane, propane, butane, isobutane and pentane are all NGLs.

Refiners, analysts and trade sources pointed out that attacks on oil and gas infrastructure in the Middle East Gulf (MEG) region led to LPG production being impacted.

As per Vortexa, MEG (excluding Iran) is India's largest supplier of LPG, covering 92 per cent, or roughly



TILTING THE BALANCE. Refiners, analysts and trade sources pointed out that attacks on oil and gas infrastructure in the Middle East Gulf region led to LPG production being impacted

720,000 barrels per day (b/d), of the country's imports as of 2025.

LPG IMPORTS SURGE

"India is already buying 10 per cent of its LPG imports from Washington. America emerged as India's major source for LPG, even more so as the war led to closure of the Strait of Hormuz, highlighting a major drawback for India's sourcing," said a refining sector official.

India will manage a few cargoes from Russia, Japan, etc. "However, many feel it will focus more on US NGLs, which it is already buying in

large numbers from Washington, due to the trade talks," he added.

Last week, Anna Zhminko, Associate Market Analyst at Vortexa, said that as uncertainty persists over MEG LPG production, US is likely to remain firmly positioned in the Asian markets at least through May and the first half of June 2026.

"MEG LPG exports, largely comprising evenly-split cargoes, supplied 92 per cent of India's and 26 per cent of South-East Asia's imports in 2025. With regional exports still constrained and butane Far East swaps re-

taining \$100 per tonne premium over propane (March 25, Argus), this brings opportunity for the US. US exporters are likely to increase butane split in their export cargo mix, when US export cargoes have historically had higher propane content," she added.

According to the US EIA, NGL exports grew by 212,000 b/d last year with a 70,000 b/d (101 per cent) increase in exports to India. In 2025, the US exported a total of 579,000 b/d of ethane to nine countries. A little more than 50 per cent of US ethane exports went to China, with the second-highest volume going to Canada by pipeline and the third-highest volume going to India by tanker.

There was a significant rise in US butane exports to India, which increased to 36,000 b/d in 2025, a 34,000 b/d increase from the previous year. Similarly, Washington's propane exports to India rose from 2,000 barrels per day (b/d) in 2024 calendar year to a record 41,000 b/d in 2025.

India's PNG Drive 2.0 gets accelerated due to war, extended till June

Rishi Ranjan Kala
New Delhi

The West Asia conflict has accelerated India's PNG Drive 2.0, with city gas companies adding over three lakh connections and processing 2.67 lakh more applications in March 2026 alone.

As of January 2026, India had almost 1.65 crore piped natural gas (PNG) connections and 8,687 CNG stations.

As the conflict continues with uncertainty over liquefied petroleum gas (LPG) imports to India, which procures 60 per cent of its requirement from the region, the government is focusing on migrating as many as 60

lakh LPG consumers to PNG. Buoyed by the encouraging response from consumers for PNG connections, the government has extended the PNG Drive 2.0 drive for another three months till June. It was launched by the Petroleum and Natural Gas Regulatory Board (PNGRB).

The three-month drive that started in January aims to expand natural gas connectivity and usage.

"During March, more than 3.1 lakh connections, including domestic, commercial, hostel, mess, canteen etc, have been gasified. In addition, more than 2.7 lakh new connections have been given and are being gasi-

fied," the Ministry of Petroleum & Natural Gas said in a statement in its daily update on West Asia conflict on Tuesday.

Besides extending the PNG 2.0 drive, the sectoral regulator also directed all the city gas distribution entities to expedite D-PNG connections, it added.

SUPPLY AFFECTED

On LPG, the ministry said that supply is affected due to the prevailing geopolitical situation. However, there are no reported dry-outs at LPG distributorships. Online LPG cylinder bookings have increased to 92 per cent on an industry basis. To prevent diversion at the distributor level, delivery authentica-

tion code (DAC)-based deliveries have been increased from 53 per cent (February) to 83 per cent on Monday.

Since March 1, on an average, more than 50 lakh domestic LPG cylinders per day have been delivered by PSU Oil Marketing Companies (OMCs). Besides, more than 3.2 lakh 5-kg FTL cylinders have been sold to migrant labourers across the country since March 23. Also, most of the States/UTs have issued orders to allocate the non-domestic LPG in line with the guidelines issued by the Centre. A total of 47,928 tonnes has been uplifted since March 14 by commercial entities in the States/UTs.

On enforcement action, the ministry said that raids continue to be carried out in many of the States/UTs to check the hoardings and black marketing of LPG.

More than 3,000 raids have been conducted, and more than 500 cylinders have been seized on Monday.

Besides, PSU OMC officials have also conducted surprise inspections at more than 1,200 petrol pumps and LPG distributorships on Monday across the country to ensure smooth supplies and to check any hoardings/black marketing cases.

They have also issued more than 540 show-cause notices to LPG distributorships till date.



The Centre is pushing adoption of piped natural gas, as an alternative to LPG cylinders. **BLOOMBERG**

India ramps up piped gas rollout

India added more than 310,000 new piped natural gas (PNG) connections in March and another 270,000 connections were issued as the government accelerated expansion of cleaner fuel networks amid supply disruptions following the closure of the Strait of Hormuz.

With the war in West Asia disrupting cooking gas LPG supplies, the government has been pushing for greater adoption of piped natural gas—considered more convenient than LPG cylinders for everyday use as gas is delivered through a pipeline directly to home without the botheration of booking refills.

The war has effectively shut the Strait of Hormuz—the shipping lane through which India got most of its LPG. While LPG supplies have been disrupted, half of the country's requirement of natural gas is produced locally and for the rest there are diversified sources.

“[In] March, more than 3.1 lakh connections including domestic, commercial, hostel, mess, canteen, etc. have been gasified. In addition to above, more than 2.7 lakh new connections have been given and are being gasified,” an oil ministry statement said. **PTI**

Delay in key pipeline link hinders Assam gas output

Suresh P Iyengar
Mumbai

At a time when the government is attempting to secure the country's gas needs amid the West Asia crisis, the delay in laying a gas pipeline of a few kilometres in Assam has stalled supplies that could have met nearly 4 per cent of the country's daily gas needs.

The delay in connecting the North Eastern Gas Grid to the hydrocarbon-rich Upper Assam basin has deprived the country of 6-8 million cubic metres (mcmd) of natural gas a day, equivalent to about 4 per cent of India's current daily consumption of nearly 200 mcmd.

Currently, producers, including Oil India, Hindustan

Oil Exploration Company, Oilmax Energy and Antelopus Selan, face severe evacuation constraints, forcing production shut-ins despite nationwide gas shortages.

Taken together, these companies can produce an additional 6-8 mcmd, with Oil India alone capable of contributing 5-6 mcmd.

Kapil Garg, Managing Director, Oilmax Energy, told *businessline* that the company had been operating below its rated capacity as demand in the Upper Assam region is limited to a few power plants and seasonal consumption by tea gardens.

For instance, the company sold only about 40 per cent of what it produced this month, and sales were almost zero last week due to lack of local demand, he said.



Workers at the Numaligarh Refinery complex in Golaghat

The new gas pipeline runs all across Brahmaputra and connects seven capitals of the North-East. The new line approved recently will start from Duliajan to Numaligarh and follows the Brahmaputra.

It will pass just 2.5 km away from the Amguri field

of the company, he said. The government has formed an inter-ministerial group to thrash-out all the delayed approvals to complete the project by December.

EXPANSION

Oilmax Energy operates three gas fields in Assam — Amguri, Duarmara and Tiphuk. The company produces around 0.25 mcmd.

The combined output of three gas fields can rise to 1.5-2 mcmd, with Amguri contributing 0.5 mcmd once grid connectivity improves.

The Amguri project has already seen investments of nearly ₹1,100 crore, and the joint venture plans to drill three additional wells, with an investment of ₹160 crore, once the evacuation bottlenecks ease.

At Tiphuk, two wells have been worked over and are expected to start production in April.

COAL GASIFICATION

Asian Energy is at an early stage of evaluating coal gasification projects, starting with a pilot project costing about ₹100 crore before scaling to commercial plants with ₹1,000 crore investment.

The company is location-agnostic but plans to be closer to the gas pipelines for easy evacuation.

Asian Energy is also ramping up its Gujarat oil assets, where current production stands at about 200 barrels per day, expected to exceed 1,000 barrels per day by the year-end through additional drilling.



Iranian crude heads to India after hiatus

PRESS TRUST OF INDIA
New Delhi, March 31

INDIA'S FIRST IRANIAN crude oil cargo since 2019 may be headed towards a port in Gujarat, according to ship tracking data.

Indian refiners have been looking to purchase a few cargoes of Iranian oil on water following the recent sanctions waiver by Washington.

"The Indo-Iranian oil trade has flickered back to life. Following the US administration's decision to grant a 30-day window for Iranian oil on the water"

due to regional conflict, the vessel Ping Shun is now en route to Vadinar (in Gujarat) with 600,000 barrels of crude. This is the first such delivery since May 2019 and comes at a critical time for Indian refiners facing

"tightening inventories," said Sumit Ritolia, Lead Research Analyst, Refining and Modelling at commodity market analytical firm Kpler.

While the identity of the buyer is unknown, Vadinar is home for 20 million tonnes a

First cargo since 2019 nears Gujarat amid sanctions relief

year oil refinery of Russian oil giant Rosneft-backed Naraya Energy. It also is the landing point for crude oil that goes to hinterland refineries such as Bina refinery of Bharat Petroleum Corporation Ltd (BPCL).

India's oil ministry has so far maintained that techno-commercial feasibility will drive the decision on resuming buying Iranian crude.

Historically, India was a major buyer of Iranian crude,

importing significant volumes of Iranian light and heavy grades due to strong refinery compatibility and favourable commercial terms.

Following sanctions tightening in 2018, imports ceased from May 2019, with volumes replaced by Middle Eastern, US and other grades. At peak, Iranian crude accounted for 11.5 per cent of India's total imports. India used to buy 518,000 barrels per day of Iranian oil in 2018, which slowed to 268,000 bpd between January and May 2019 when the US granted waivers to a few buyers.



India ramps up PNG rollout

India added more than 3.1 lakh new piped natural gas (PNG) connections in March and another 2.7 lakh connections were issued as the government accelerated the expansion of cleaner fuel networks amid supply disruptions following the closure of the SoH. With the war in West Asia disrupting cooking gas LPG supplies, the government has been pushing for greater adoption of PNG. The fuel is considered more convenient than LPG cylinders for everyday use as gas is delivered through a pipeline directly to homes without the bother of booking refills.

The war has effectively shut the Strait of Hormuz, the shipping lane through which India received most of its LPG. While LPG supplies have been disrupted, half of the country's requirement of natural gas is produced locally and there are diversified sources for the remainder. "During the month of March, more than 3.1 lakh connections including domestic, commercial, hostel, mess and canteen have been gasified. In addition to above, more than 2.7 lakh new connections have been given and are being gasified," an oil ministry statement said. **-PTI**

Govt raises regulated gas price for ONGC, Oil India to USD 7/mmBtu

PTI

NEW DELHI

The government has raised the administered price mechanism (APM) gas price for state-run producers Oil and Natural Gas Corporation and Oil India Limited to \$7 per mmBtu, up from \$6.75 per mmBtu, according to an official notification.

The revision applies to gas produced from legacy fields under the regulated pricing regime. APM gas accounts for about 60% of domestic gas production at 92 million standard



cubic metres per day. A hike in its rates will impact user industries, from fertiliser to CNG and piped cooking gas.

The revision follows the pricing mechanism the government approved in 2023. Under the revised guidelines, the price of natural gas produced from old and legacy fields, which were given to state-owned Oil and Natural

Gas Corporation (ONGC) and Oil India Limited (OIL) without bidding, is determined as 10% of the monthly average of the Indian crude basket and is notified on a monthly basis.

For gas produced by ONGC and OIL from their nomination blocks, the APM price is subject to a floor of \$4 per million British thermal unit (mmBtu) and a ceiling of \$6.5 per mmBtu. The ceiling was to be maintained for two financial years (2023-24 and 2024-25) and then increased by \$0.25 per mmBtu.

Go get your own oil: Trump tells allies as crude prices surge globally

ASHOKE RAJ ■ New Delhi

In a blunt and controversial statement, US President Donald Trump has told key allies, including the United Kingdom, to fend for themselves in securing energy supplies amid escalating tensions in West Asia and disruptions in the Strait of Hormuz.

Posting on his social media platform, Truth Social, Trump criticised countries that declined to support recent US-led strikes against Iran, urging them to "go get your own oil" if they face shortages due to instability in the region.

"All of those countries that can't get jet fuel because of the Strait of Hormuz, like the United Kingdom, which

refused to get involved... I have a suggestion for you: Number 1, buy from the U.S., we have plenty, and Number 2, build up some delayed courage, go to the Strait, and just TAKE IT," Trump wrote.

The US President also signalled a potential shift in Washington's long-standing security commitments. He indicated that countries may need to take greater responsibility for their own defence, suggesting that the United States may no longer provide the same level of support as in the past.

"You'll have to start learning how to fight for yourself. The USA won't be there to help you anymore, just like you weren't there for us. Iran has been, essentially, decimated. The hard part is



Representative image

done. Go get your own oil!" he added.

The remarks come more than a month after coordinated military strikes by the United States and Israel on Iranian targets, which have significantly escalated tensions in the region. Despite these operations, Iran continues to exert control over the Strait of Hormuz — a critical maritime chokepoint through which nearly one-fifth of the world's oil supply passes during peacetime.

Tehran's actions, including reported attacks on regional energy infrastructure, have sent shockwaves through global markets. Oil prices have surged, stock markets have shown increased volatility, and the cost of essential commodities has

risen worldwide, underlining the far-reaching economic consequences of the crisis.

Trump also issued a stern warning to Iran, stating that if a ceasefire is not reached soon and the strait remains blocked, the United States could expand its military campaign. Potential targets, he indicated, may include key energy infrastructure such as the Kharg Island oil export terminal and desalination facilities.

Meanwhile, US allies in the Gulf — many of whom have been directly affected by the conflict — are reportedly urging Washington to maintain pressure until Iran's military capabilities are significantly weakened.

CONTINUED ON >> P4



Go get your own oil: Trump tells allies as...

Responding to the rising tensions, Iranian Foreign Minister Abbas Araghchi maintained that Tehran's actions are defensive in nature and directed solely at US forces in the region. "Our operations are aimed at enemy aggressors who have no respect for Arabs or Iranians, nor can provide any security," he said in a statement posted on X. As the situation in the Gulf remains volatile, Trump's remarks are likely to deepen strains within traditional alliances while raising fresh concerns about global energy security and the future direction of US foreign policy commitments.

PUSH FOR PNG TO CUT LPG DEPENDENCE

Govt rolls out time-bound framework for nationwide gas pipeline expansion

OUR CORRESPONDENT

NEW DELHI: Amidst the month-long unrest in West Asia, the Centre has set a time-bound framework for pipeline infrastructure expansion nationwide in an effort to reduce the demand for LPG.

The Natural Gas and Petroleum Products Distribution (Through Laying, Building, Operation and Expansion of Pipelines and Other Facilities) Order, 2026 under the Essential Commodities Act, 1955 was announced by the government on Tuesday in an official communication.

The order introduces a streamlined and time-bound framework for the nationwide expansion of pipeline infrastructure - provision of PNG connections and enabling a gradual transition from LPG to piped gas in areas where infrastructure is available.

The order authorized entities to lay and expand pipelines across regions to facilitate the rapid expansion of City Gas Distribution (CGD) networks



People wait with empty LPG cylinders at a gas agency to avail the refilled ones amid the ongoing supply crunch, in Navi Mumbai PTI

and improve last-mile connectivity for piped natural gas (PNG). The government claims that by streamlining compliance standards, doing away with arbitrary levies, and adopting precisely defined compensation procedures like "dig and restore" and "dig and pay" to reduce conflicts, the Order creates an open and investor-friendly regulatory system. Additionally, it balances the requirements of infrastructure development

with the public interest by incorporating safeguards such as a dispute resolution process and rules to prevent unjustified denial of access by private entities or municipal authorities.

The government is promoting natural gas as a crucial transition fuel at a time when the world's energy environment is changing and energy demand is rising. According to officials, the Order aims to guarantee fair access to cleaner energy, expedite infrastructure devel-

HIGHLIGHTS

- » The govt issued an order, introducing a streamlined and time-bound framework for the nationwide expansion
- » The order authorised entities to lay and expand pipelines across regions to facilitate the rapid expansion of City Gas Distribution networks

fuels, and promote economic growth by guaranteeing a steady and reasonably priced energy supply.

Regularly, the Ministry of Petroleum and Natural Gas along with other important ministries - Shipping and Ports, and External Affairs - are holding briefings here in the national capital. The centre further underlined that all refineries are operating at high capacity and adequate crude inventories are available, while sufficient stocks of petrol and diesel are being maintained. In another major move towards boosting the domestic LPG production from refineries, the Indian OMCs, reportedly, maximising output by diverting propane/butane from petrochemicals into the domestic cooking pool.

The government said retail fuel outlets are functioning normally across the country, although panic buying was reported in some areas due to rumours, leading to unusually high sales and crowding at petrol pumps.

opment, and make conducting business easier.

By diversifying the gas distribution network and increasing investor confidence through regulatory clarity and quicker approvals, the government anticipates that the reform would improve energy security. Additionally, it will probably speed up the development of pipeline infrastructure in urban and semi-urban regions, enhance air quality by encouraging the use of cleaner

'India's first Iranian oil cargo since 2019 heads to Guj coast'

MPOST BUREAU

NEW DELHI: India's first Iranian crude oil cargo since 2019 may be headed towards a port in Gujarat, according to ship tracking data.

Indian refiners have been looking to purchase a few cargoes of Iranian oil on water following the recent sanctions waiver by Washington.

"The Indo-Iranian oil trade has flickered back to life. Following the US administration's decision to grant a 30-day window for Iranian oil "on the water" due to regional conflict, the vessel Ping Shun is now en route to Vadinar (in Gujarat) with 600,000 barrels of crude. This is the first such delivery since May 2019 and comes at a critical time for Indian refiners facing tightening inventories," said Sumit Ritolia, Lead Research Analyst, Refining and Modelling at commodity market analytic firm Kpler.

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INSIGHT

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per cent of India's total imports.

India used to buy 518,000 barrels per day of Iranian oil in 2018, which slowed to 268,000 bpd between January and May 2019 when the US granted waivers to a few buyers. There have been no imports since.

The key grades that Indian refiners used to purchase are Iran light and Iran heavy crudes. "The Aframax Ping Shun (IMO 9231901) loaded with Iranian crude oil from Kharg Island in early March has emerged as the first vessel observed signalling a destination of Vadinar, India since May 2019, following sanction reimposition on Iranian oil by the first Trump administration," Ritolia said.

The US earlier this month waived sanctions on the purchase of Iranian oil at sea for 30 days in its latest attempt to ease oil prices that have been driven up by the US-Israeli war on Iran.

That window expires April 19. An estimated 95 million barrels of Iranian oil is on vessels on sea, of which around 51 million barrels could be sold to India while the remaining are better suited for buyers in China and Southeast Asia.

Activate Windows
Go to Settings to activate Windows

From Hormuz to the household: Why India needs a new energy security doctrine



MEGHA
JAIN

SURABHI
SINGH



A missile strike in the Strait of Hormuz may seem distant until it shows up in the price you pay at the petrol pump. For India, this is not a hypothetical scenario but a recurring economic reality. In an increasingly interconnected world, geopolitical disruptions travel quickly through energy markets, landing squarely in household budgets.

The shock of Russia's invasion of Ukraine in 2022 is a case in point. As global crude prices surged, India's import bill ballooned, driving inflation across sectors. For a country that imports nearly 85% of its crude oil, exposure to such external shocks is not incidental; it is structural. What appears to be a distant conflict can, within weeks, reshape domestic economic conditions from metropolitan centres to small towns. Energy security is no longer just an economic concern; it is a national strategic imperative. India must move beyond reactive measures to a coherent energy security doctrine that anticipates and absorbs global shocks.

The anatomy of exposure

India's energy map is, in many ways, a map of geopolitical risk. Nearly a fifth of global oil trade passes through the Strait of Hormuz, and a significant share of India's crude imports traverses this narrow corridor. Any escalation involving regional powers, particularly Iran, has immediate implications not only for physical supply but also for global price benchmarks through heightened risk premiums.

A similar fragility defines the Red Sea corridor. Since late 2023, attacks on commercial shipping have forced vessels to reroute around the Cape of Good Hope, increasing transit times, freight charges, and insurance costs. These ripple through supply chains, functioning as an "invisible tax" on importing economies like India. Disruptions thousands of kilometres away translate into higher landed costs of crude, which then filter through the domestic economy.

Oil shocks are transmitted rapidly and widely. A spike in crude prices raises transportation and logistics costs, pushing up prices across

sectors — from manufacturing inputs to agricultural produce. Fertiliser costs rise, food prices follow, and inflation becomes embedded at the household level. The macroeconomic consequences are equally significant: a higher import bill widens the current account deficit, pressures the rupee, and increases the cost of dollar-denominated imports, compounding the initial shock.

Even modest price changes carry substantial weight. A \$10 per barrel rise can add an estimated \$14-15 billion to India's annual import bill. For policymakers, this means tighter fiscal space and heavier subsidy burdens; for MSMEs, compressed margins and reduced competitiveness. India has managed past disruptions through calibrated taxation and opportunistic sourcing, but in a world of frequent and overlapping geopolitical crises, such measures amount to cushioning, not resilience.

Strengths Without a System

India has taken meaningful steps to reduce its vulnerability. Following the Ukraine conflict, it increased imports of discounted Russian crude, at one point accounting for over a third of total imports. Supplier diversification has expanded to include the United States, Brazil, Guyana, and parts of West Africa. Domestically, ethanol blending in petrol has crossed 12 per cent, and renewable energy capacity has surpassed 200 GW, with solar playing a leading role.

Yet these gains remain fragmented. India's Strategic Petroleum Reserves (SPR) cover only about 9-10 days of demand — modest compared to the United States' roughly 60 days or China's approximately 70-80 days. In a prolonged disruption, such as a sustained Hormuz blockade, these buffers would offer limited protection. The challenge is not the absence of policy action but the lack of integration. India's energy strategy

must evolve from a set of discrete initiatives into a unified, doctrine-driven framework.

Towards a doctrine

India's next phase of energy security must rest on four strategic pillars.

First, diversify supply at scale — extending long-term partnerships beyond the Gulf to the Americas, Africa, and Central Asia, while institutionalising energy diplomacy.




Second, expand strategic reserves urgently, targeting at least 15-20 days of cover in the near term, supported by public-private participation and clear drawdown protocols.

Third, secure maritime energy routes - from Hormuz to the Strait of Malacca — through enhanced naval capabilities and closer coordination with strategic partners. Fourth, accelerate the clean energy transition: expanding renewables, scaling green hydrogen, and promoting electric mobility are not merely climate goals but strategic hedges against oil dependency. Together, these measures shift India's posture from managing shocks to pre-empting them.

Every global conflict today carries an economic cost for India — not always visible in headlines but felt acutely in household budgets. Energy costs — from petrol to cooking gas — have become a real-time indicator of geopolitical instability. India has both the capacity and the opportunity to change this equation. By embedding energy security at the core of national strategy, it can transform a structural vulnerability into strategic resilience. The next oil shock is not a question of if, but when. Preparedness must be built accordingly.

The Pioneer
SINCE 1865

Megha Jain - Assistant Professor at Shyam Lal College, University of Delhi and Senior Visiting Fellow, Pahle India Foundation and Surabhi Singh - Research Associate, Pahle India Foundation

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On global tensions and India's economy

In an economy that imports more than four-fifths of its crude oil, external shocks transmitted through energy prices, shipping route, and volatile commodity markets can significantly reshape fiscal arithmetic. In this context, India must rebalance toward income-led demand, more resilient revenue bases and greater energy diversification

ECONOMIC NOTES

Deepanshu Mohan

Rising geopolitical instability in West Asia is forcing a reassessment of how India's macroeconomic strength is measured.

As of March 2026, this instability has translated into active macroeconomic stress. The rupee has depreciated to a record low of ₹95 per dollar, the Indian basket of crude oil hit \$156.29 per barrel, and the Reserve Bank of India has deployed billions of dollars of foreign exchange reserves to contain volatility. In such conditions, strong quarterly GDP prints capture domestic activity but often overlook vulnerabilities linked to energy imports, shipping routes and fiscal buffers.

Against this backdrop, India enters the post-Budget season with a striking macroeconomic contradiction. Headline indicators remain robust: the State Bank of India expects Q3 FY26 GDP growth of about 8.1 percent, public capital expenditure is near 4 percent of GDP, and fiscal consolidation toward a 4.3 percent deficit by FY27 remains intact. At the same time, external buffers are weakening. Foreign exchange reserves have declined from recent highs to about \$709.76 billion, while foreign portfolio outflows of over \$8 billion following the onset of the conflict have intensified currency pressures.

Yet income dynamics are weaker. Real wages remain subdued, household liabilities have risen to roughly 41 percent of GDP, and private investment continues to lag the state's expanded expansion.

This divergence reflects a deeper shift in India's fiscal architecture: revenue buoyancy is increasingly driven by transaction-linked taxation while expenditure tilts toward capital formation. In a stable global environment this model can sustain growth, but when energy markets become volatile, its durability depends on whether fiscal revenues, consumption and investment can withstand external commodity shocks.

Shifts in revenue structure

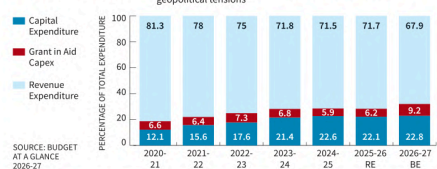
India's revenue structure has been shifting in ways that matter more in a volatile global environment. Revenue receipts have risen from 8.5 percent of GDP in FY16-20 to about 9.1 percent in FY22-FY25 (PA), but the increase reflects recomposition rather than a broadening of income taxation. The Union Budget 2026-27 estimates gross tax revenue at ₹44.04 lakh crore, yet much of the buoyancy now comes from transaction-linked channels. GST collections reached ₹22.8 lakh crore in FY25, while levies on financial and cross-border transactions have also expanded.

Direct taxes typically expand when more workers move into stable paid employment. As a result, revenue growth increasingly depends on the volume of economic transactions rather than income deepening.

External shocks particularly energy price spikes that raise transport costs and compress household spending can quickly slow transactions. In such conditions, a fiscal model reliant on activity-linked taxation becomes more sensitive to geopolitical disruptions that ripple through consumption, trade and financial markets.

This vulnerability has been evident

Fiscal trends India's fiscal stability is tied to capital spending and transaction-based revenues, leaving it vulnerable to energy shocks amid geopolitical tensions



SOURCE: BUDGET AT A GLANCE 2026-27
SOURCE: CME SOURCE: STOCK OF FINANCIAL ASSETS AND LIABILITIES OF HOUSEHOLDS, RBI HOUSEHOLD SAVINGS



during past shocks. During the pandemic, widening gaps between projected and actual GST revenues forced the Union government to borrow over ₹2.69 lakh crore between 2020 and 2022 to compensate states for revenue shortfalls.

The effects of oil price surge

India's fiscal system remains structurally exposed to oil price volatility. The country imports around 85-87 percent of its crude oil, making it directly vulnerable to external energy shocks.

Empirical estimates suggest that a \$10 per barrel rise in crude prices can increase Consumer Price Index inflation by roughly 0.2 percentage points, widen the current account deficit by about \$9-10 billion (around 0.4 percent of GDP) and reduce GDP growth by nearly 0.5 percentage points under partial pass-through conditions. Oil shocks also propagate through the fiscal system: higher energy costs raise fertiliser and LPG subsidy requirements, increase transport and logistics costs, and elevate inflation-linked expenditure.

Recent policy responses illustrate this transmission. Following the Russian invasion of Ukraine, the Indian crude basket surged from roughly \$59 per barrel in 2019 to over \$120 in mid-2022.

To contain inflation, the government reduced central excise duties on petrol and diesel by a cumulative ₹13 and ₹16 per litre between November 2021 and May 2022, resulting in an estimated ₹2.2 lakh crore revenue loss. At the same time, energy-linked subsidies expanded, with fertiliser support rising sharply and total energy subsidies touching nearly ₹3.2 lakh crore.

Amid the ongoing conflict in West Asia, estimates by ICRA suggest that if oil prices average around \$100 per barrel, India's current account deficit could widen from about 0.7-0.8 percent to nearly 1 percent of GDP, while government expenditure could rise by as much as ₹3.6 trillion due to higher subsidy and compensation requirements. This underscores how energy shocks translate simultaneously into external imbalances and fiscal stress.

When oil prices spike, governments typically absorb part of the shock through tax reductions and subsidy expansion, compressing fiscal space. In a system increasingly reliant on transaction-linked taxes, such shocks can simultaneously weaken consumption, reduce GST buoyancy and expand expenditure pressures, creating a direct fiscal squeeze.

Impact on households

Household balance sheets reveal a key channel through which energy volatility transmits into the domestic economy.

Private consumption accounts for roughly 61.4 percent of India's GDP, yet household liabilities have risen sharply from about 36-37 percent of GDP in 2022 to over 41 percent by 2025, increasing sensitivity to inflationary shocks and suggesting that consumption is being sustained less by income growth and more through credit expansion.

Net financial savings have also become more volatile, falling to around 3-4 percent of GDP in recent quarters before recovering to about 7.6 percent.

The exposure is being amplified by the current shock, as disruptions to LPG supply chains – over 60 percent of which depend on imports – have translated into

longer refill cycles and local shortages, raising household energy costs even as leverage remains elevated.

At the same time, India's expenditure strategy has pivoted toward infrastructure-led growth. The Union Budget 2026-27 places effective capital expenditure at ₹17.15 lakh crore.

While such front-loaded investment strengthens long-term productive capacity, it compresses fiscal space for welfare stabilisers. Allocations for the Mahatma Gandhi National Rural Employment Guarantee Act fell to ₹60,000 crore in 2023-24, 33 percent below the previous year's revised estimate; by December 2022, States had already spent 117 percent of available funds, with ₹8,449 crore in pending liabilities.

In a low-wage environment, imported energy inflation compresses real incomes while debt servicing obligations remain fixed. Rising household leverage therefore becomes a macroeconomic vulnerability, especially when fiscal policy prioritises capital formation over income support.

Implications for industrial sector

India's industrial upswing is increasingly concentrated in capital-intensive sectors aligned with public investment. Industrial output rose 7.8 percent in December 2025, with manufacturing expanding 8.1 percent year-on-year and 4.8 percent over April-December. High- and medium-technology industries now account for about 46 percent of manufacturing value added, according to the Economic Survey 2025-26.

By contrast, labour-intensive industries remain weak.

Private investment remains cautious despite rising project announcements. CMEI (Centre for Monitoring Indian Economy) data shows private firms account for nearly 80 percent of new project announcements, yet only about 9 percent reached completion in 2022-23, suggesting a recovery that expands production capacity more than wage-linked income.

In a volatile global environment, this financial strength has translated into greater risk selectivity rather than broader credit expansion.

The recent LPG crisis induced shortages of commercial cylinders have forced the closure of restaurants, cloud kitchens and small food businesses, with gig worker unions reporting a 50-60 percent decline in food delivery orders. Such shocks disproportionately affect labour-intensive and informal sectors, where incomes are directly tied to daily demand and lack institutional protection, even as capital-intensive sectors remain relatively insulated within the financial system.

As external pressures intensify, they raise a broader question of fiscal optionality: the state's ability to absorb shocks without abandoning consolidation targets. With fiscal space tied to capital expenditure and revenues dependent on economic transactions, geopolitical disruptions can quickly narrow the room for counter-cyclical intervention. In such a context, India must rebalance toward income-led demand, more resilient revenue bases and greater energy diversification, or risk turning external shocks into a recurring source of fiscal stress.

(Deepanshu Mohan is professor and dean, O.P. Jindal Global University. He is a visiting professor at LSE and a visiting academic fellow at University of Oxford. Saksham Raj and Aditi Lazarus contributed to this column.)

THE GIST

India's fiscal system remains structurally exposed to oil price volatility. External shocks, particularly energy price spikes raise transport costs and compress household spending.

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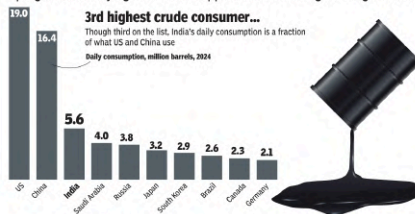
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CAN INDIA BRIDGE THE OIL AND GAS GULF?

Good thing is, as GOI's said, there's adequate supplies of oil & gas. But, what if Iran war carries on? Iran's said Hormuz is open to 'friendly' countries, including India. But there's too much uncertainty. The answer may lie in rapidly diversifying import sources. This is already a work in progress. But buying from other suppliers will mean higher freight costs



...But with second highest supply gap

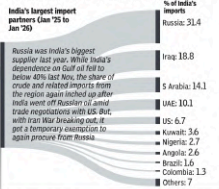
India has barely any oil reserves to speak of, which is also the case with China. Five of the 10 countries with the biggest consumption-production gaps are located in Asia, if Turkey is left out

Production and consumption gap, million barrels per day, 2024

Country	Production	Consumption	Gap
China	4.3	16.4	12.1
India	0.7	5.6	4.9
Japan	0.0	3.2	3.2
South Korea	0.0	2.9	2.9
Germany	0.0	2.1	2.1
Singapore	0.0	1.5	1.5
France	0.0	1.4	1.4
Spain	0.0	1.3	1.3
Italy	0.1	1.3	1.2
Turkiye	0.0	1.2	1.2

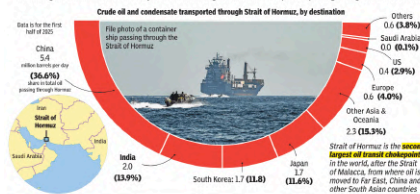
Half of crude, LPG comes from Gulf...

In Jan this year, more than 55% of crude oil and liquids, including LPG, imported by India came from the Persian Gulf, up from a little less than 50% in Jan 2025



...With big flow through Hormuz

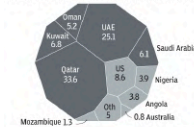
Most of the Gulf oil fields, including in Iran, are located on the Persian Gulf and hence Strait of Hormuz is the cheapest route for moving Gulf oil to India. The country has the second highest share in oil shipments passing through this vital stretch



Dependence on Gulf gas is even bigger...

In the past year, around 80% of India's LNG came from Gulf countries, with the share going up to over 90% in Feb and March 2025. More than 95% of India's natural gas comes from Qatar and UAE

India's top import partners, % share in imports (Jan '25 to Jan '26)



Another energy gap to mind

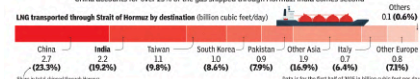
The gap between consumption and production of natural gas for India was eighth widest in the world in 2024, again because of limited reserves

Production and consumption gap, million cubic feet/day, 2024

Country	Production	Consumption	Gap
China	24.0	41.9	17.9
Japan	0.0	8.8	8.8
Germany	0.4	7.6	7.2
Mexico	3.5	9.7	6.2
South Korea	0.0	6.1	6.1
Italy	0.3	5.7	5.4
Turkiye	0.0	4.9	4.9
India	3.1	6.8	3.7
France	0.0	3.1	3.1
UK	3.0	6.0	3.0

Hormuz again vital to supplies

China accounts for over 23% of the gas shipped through Hormuz. India comes second



So, what are India's options?

DI said earlier this week that India has 74 days of oil reserves. This includes crude stocks, products (diesel, petrol, kerosene), and dedicated strategic storage. PM Modi recently said India has 5.1 million tonnes of crude in strategic reserves. GOI also said crude procurement for next few months had been assured.

India is trying to diversify LPG sources. It's sourcing supplies from US, Norway, Russia, Canada, and Argentina. State-run oil companies — IOC, OPCL, HPCL — have signed a deal to import 2.2 million tonnes of LPG from US in 2026. Some supplies have already arrived. Argentina has also ramped up LPG exports to India.

At the economics of transportation is a factor: it takes 5-7 days for a vessel from West Asia to reach India, around 40-45 days from US, Canada and Argentina, about 35 days from Russia, and nearly the same duration from Norway. So, freight charges for non-Gulf LPG will be higher by as much as 40%, compared to LPG that comes via Hormuz.

Source: The Energy Institute, US Energy Information Administration, Ministry of commerce
Oil production and consumption includes crude oil, shale oil, oil sands, condensate and natural gas liquids; ethanol, LPG and naphtha



India can comfortably cater to PNG demand: govt.

Saptaparno Ghosh
NEW DELHI

India can comfortably cater to the demand of as many as 30 crore domestic piped natural gas (PNG) connections even if it were to solely rely on its domestic production of liquefied natural gas (LNG), according to Anjan Kumar Mishra, Secretary at the Petroleum and Natural Gas Regulatory Board.

He also said that the government was trying to scale up number of connections added every day.

With escalating tensions in West Asia, the government has sought to institute mechanisms for an accelerated and incentivised transition to piped gas.

The objective is to ease some pressure off the liquefied petroleum gas (LPG), supplies of which have been affected.

Speaking to *The Hindu* on the sidelines of industry body PHD Chamber of Commerce and Industry's Hydrocarbon Summit, Mr. Mishra said India had approximately 1.1-1.2 crore active domestic PNG connections. These connections consumed 3 million metric standard cubic meters of natural gas per day.

CONTINUED ON
» PAGE 10

'India can comfortably cater to PNG demand'

India's current production of natural gas was 90 million metric standard cubic meters per day. Therefore, India could comfortably cater to about 30 crore connections solely with its domestic production of natural gas itself, he said.

"Even if we are just reserving the [domestic natural gas] production for domestic PNG, we should be able to make provisions for 30 crore connections," Mr. Mishra said. "So, even if you scale up to say two crore, or five crore, we are totally sufficient with respect to our domestic consumption."

"We are trying to achieve 20,000 connections every day," he said. "At present, we are hovering around 8,000-9,000 connections per day; we are definitely trying to scale the level."

He further noted that, with permissions being accorded on a "war footing" by the government, municipal corporations, among other entities concerned, had played an active role in the attempt to reach the target.

The Ministry of Petroleum and Natural Gas, in a gazette notification dated March 24, had introduced norms to help accelerate the uptake of and transition to PNG.

Addressing concerns about the requirement of additional capital expenditure amid the expedited push for PNG and pipeline expansion, Mr. Mishra said the accelerated push would provide the city gas distributors (CGDs) an opportunity to infuse their available capital more rapidly.

Gas prices in US soar past \$4 per gallon, highest since 2022

WYATTE GRANTHAM-PHILIPS
New York

US gas prices jumped past an average of \$4 a gallon for the first time since 2022 on Tuesday as the Iran war pushed fuel prices to soar worldwide.

According to motor club AAA, the national average for a gallon of regular gasoline is now \$4.02 — over a dollar more than before the war began. The last time US drivers were collectively paying this much at the pump was nearly four years ago, following Russia's invasion of Ukraine. The price is a national average, meaning drivers in some states have been paying well over \$4 a gallon for a

while now. Prices vary from state to state due to factors ranging from nearby supply to differing tax rates.

Since the US and Israel launched a joint war against Iran on February 28, the cost of crude oil — the main ingredient in gasoline — has spiked and swung rapidly. That's because the conflict has caused deep supply chain disruptions and cuts from major oil producers across the Middle East.

Higher gas prices are impacting consumers and businesses as many households continue to face wider cost of living strains. And as drivers pay more to cover necessities like gas, many may be forced to cut their

budgets in other places.

More expensive fuel can also push up other spending, from utility bills to the price of many goods consumers buy each day.

In the immediate future, analysts point to groceries, which have to be restocked frequently and could also see price hikes as businesses' transportation costs pile up.

But hauling other cargo and packages has also been impacted. The United Postal Service, for example, is seeking a temporary 8 per cent added charge on some of its popular products including Priority Mail.

Diesel, the fuel used for many freight and delivery trucks, is now going for an



average of \$5.45 a gallon, up from about \$3.76 a gallon before the war began, per AAA.

If the war drags on, it's possible that those prices could tick up even higher. Most tanker movement in the key Strait of Hormuz, where roughly one-fifth of the

world's oil typically sails through, remains at a halt.

That's led to cuts from major producers in the region who have no way of getting their crude to market. Meanwhile, Iran, Israel and the US have all struck oil and gas facilities, worsening supply concerns. In a search

for some relief, the International Energy Agency pledged to release 400 million barrels of oil from emergency stockpiles of member nations. That includes the US, despite Trump initially downplaying the need for reserve oil.

The Trump administration has also eased sanctions to free up some oil from Venezuela, and temporarily Russia. The White House also says it's waiving maritime shipping requirements under a more than century-old law, known as the Jones Act, for 60 days. It's not yet clear if those efforts will bring relief for consumers. A lot of factors contribute to gas prices. Refineries buy crude oil in

advance, meaning some could be working with more expensive oil for a while, and it will take time for any new supply to trickle down to consumers. And while steep crude prices are a leading driver behind today's surge, US gas prices typically tick up a bit at this time of year. More drivers are hitting the road and trying to fuel up while they can, so there's higher demand.

Warming weather also brings a shift to summer blend fuel, which is more expensive to produce than winter blend. The US, which is a net oil exporter, hasn't seen as stark a shock as other parts of the world that rely more heavily on fuel imports from the Middle East, notably Asia. But

that doesn't mean America is immune to price spikes.

Oil is a globally-traded commodity. And most of what the US produces is light, sweet crude — but refineries on the East and West coasts are primarily designed to process heavier, sour product. As a result, the country also needs imports.

Escalating geopolitical conflicts have disrupted oil flows and contributed to a surge in gas prices in the past. The US average for regular gasoline climbed to its highest level of more than \$4 a gallon in June 2022, nearly four months after the Ukraine war began and world leaders imposed sanctions against Russia, a leading oil producer. (PTI)



Unexpected surge

The Index of Industrial Production diverges from previous data

India's industrial growth held a positive surprise in February 2026, coming in at 5.2%, marginally faster than the growth in January. Apart from November and December last year, February's industrial performance – as measured by the Index of Industrial Production (IIP) – was the best in nearly two years. Why this was a surprise was because this performance diverges quite sharply from what was indicated by the Index of Eight Core Industries released earlier this month. The eight core sectors – crude oil, natural gas, refinery products, coal, fertilizers, steel, cement, and electricity – saw their combined growth slow to 2.3% in February, about half the growth rate in January. These core sectors have a weightage of about 40% in the IIP, and so the expectation was that they would drag the IIP down too. Yet, something else happened. This would imply that sectors outside the core ones did well. Most notably, the manufacturing sector in the IIP saw growth accelerate to a respectable 6% in February. The capital goods sector's growth accelerated to a 28-month high of 12.5%, on an already strong base of 8.1%. These are good signs for labour and capital. What is more concerning is that some elements of consumer demand are going in the opposite direction. Consumer durables grew 7.3%, but consumer non-durables contracted 0.6%, the second consecutive month of shrinkage. It had contracted in February last year as well, so this was not a statistical anomaly.

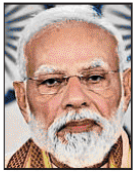
In general, spending on non-durables involves greater discretion on a day-to-day basis, and so is a better gauge of consumer sentiment. At the moment, at least this data suggest that sentiment is low. This also correlates with the new series of national accounts data showing that household expenditure has had a shrinking contribution to GDP. The government should also look into why the IIP and the Eight Core Industries index moved in opposite directions in February. The two are normally highly correlated, and so a divergence is immediately noteworthy. From the looks of things, February's strong IIP performance is likely to be a short-lived acceleration. The West Asia crisis is already having an impact on the economy. The monthly economic review by the Finance Ministry has said that early high-frequency economic indicators for March are pointing towards a "moderation in economic momentum". The longer the war persists, the sharper this "moderation" is likely to be. On a positive note, while what is being measured might turn dismal, how it is being measured will soon improve. The new, upgraded series of IIP data will be released in May. As the new GDP and CPI have done, the new IIP is sure to provide a clearer picture of the economy – the good and the bad.

Shielded people from hike as global crude prices rose: PM

Cong Trying To Reap Political Gains: Modi

Tushar.Prabhune
@timesofindia.com

Ahmedabad/Palanpur: As the intensifying war in West Asia roils global energy markets and disrupts supply chains, PM Narendra Modi on Tuesday said “govt shielded



people in India” by not hiking fuel prices while simultaneously displaying stability and progress in the face of turmoil.

On a one-day visit to Gujarat, Modi also claimed Congress was orchestrating a conspiracy to reap political gains from the global upheaval.

He stressed that it was “extremely important” for a democratic country like India to take the lead to ensure global development in the face of supply chain disruptions and geopolitical conflict. He emphasised that gov was laying a strong foundation for technology and energy security.



It was ‘extremely important’ for India to take the lead to ensure global development in the face of supply chain disruptions, PM said

“Congress cannot reconcile itself to this (not hiking fuel prices) and so its netas are relentlessly spreading rumours to create an atmosphere of fear. They want people to queue up... and they can fuel a misinformation campaign,” Modi said, likening Congress to “political vultures” in his speech at Vav-Tharad, Banaskantha district.

Recalling the shirtless protest by Congress’s youth wing members at the Global AI Summit, Modi said the party’s intention was clearly to malign India’s image.

“We should feel proud that when many countries are struggling to protect themselves from the impact of war, India is not only main-

taining stability but progressing rapidly,” he said.

Earlier, in Sanand near Ahmedabad, Modi said, “Global supply chains, be it chips, rare earth minerals or energy, have been badly affected by conflicts. These are intrinsically linked to the accelerated progress of humanity, and any disruptions in these supply chains impact the development of the entire human race,” he said.

Describing this as India’s “Techade”, the PM said the current period was not just about economic competition but about shaping the future tech landscape. “India’s AI ecosystem will get great strength from the rise of our semiconductor sector,” he added.



Gas prices soar past \$4 per gallon in US, highest since 2022

NEW YORK, MARCH 31

US gas prices jumped past an average of \$4 a gallon for the first time since 2022 on Tuesday as the Iran war pushed fuel prices to soar worldwide. According to motor club AAA, the national average for a gallon of regular gasoline is now \$4.02 — over a dollar more than before the war began.

The last time US drivers were collectively paying this much at the pump was nearly four years ago, following Russia's invasion of Ukraine.

The price is a national average, meaning drivers in some states have been paying well over \$4 a gallon for a while now. Prices vary from state to state due to factors ranging from nearby supply to differing tax rates.

Since the US and Israel launched a joint war against Iran on February 28, the cost of crude oil — the main ingredient in gasoline — has spiked and swung rapidly. That's because the conflict has caused deep supply chain dis-

ruptions and cuts from major oil producers across West Asia. Motorists around the world are also coping with higher gas prices due to the war.

In Paris, for example, gas is at 2.34 euros per litre (\$2.68), which is about \$10.27 a gallon. Expensive gas could drag on the economy and drive up other prices.

Higher gas prices are impacting consumers and businesses as many households continue to face wider cost of living strains. And as drivers pay more to cover necessities like gas, many may be forced to cut their budgets in other places. More expensive fuel can also push up other spending, from utility bills to the price of many goods consumers buy each day. In the immediate future, analysts point to groceries, which have to be restocked frequently and could also see price hikes as businesses' transportation costs pile up. But hauling other cargo and packages has also been impacted. — AP

Ggm targets 70K PNG connections in 3 mnths

Leena Dhankhar

leena.dhankhar@hindustantimes.com

GURUGRAM: The district administration has set a target to provide piped natural gas (PNG) connections to nearly 70,000 households in Gurugram over the next three months, officials said during a review meeting chaired by the principal advisor for urban development on Tuesday.

The decision was taken at a high-level meeting attended by officials from the district administration, gas supply agencies, and civic bodies, with authorities prioritising expansion to ensure uninterrupted and safer domestic gas supply across Gurugram.

District food and supplies controller Ashok Rawat told HT that gas distribution companies, including Indraprastha Gas Limited (IGL) and Haryana City Gas, are scaling up infrastructure. "Efforts are being made to ensure that the target number of Gurugram households are brought under PNG coverage within the stipulated timeline," Rawat said.

Officials said pipeline infrastructure is being expanded, with around 22,000 metres already available and additional work orders issued. Nearly 100 kilometres of pipeline is planned in the coming months, they added.

Around 60 teams are currently engaged in pipeline laying, with numbers expected to rise, officials aware of the development said.

To be sure, the IGL has 21,692 connections in the city, and the HCG has 61,911 connections. According to officials,

PUSH TO EXPAND PNG NETWORK

- **Agencies involved:** District administration, gas firms, civic bodies
- **Key firms:** Haryana City Gas, Indraprastha Gas Limited
- **Existing connections:** IGL – 21,692; HCG – 61,911
- **Pipeline status:** 22,000 metres laid; About 100 km planned
- **About 60 teams are deployed for project**

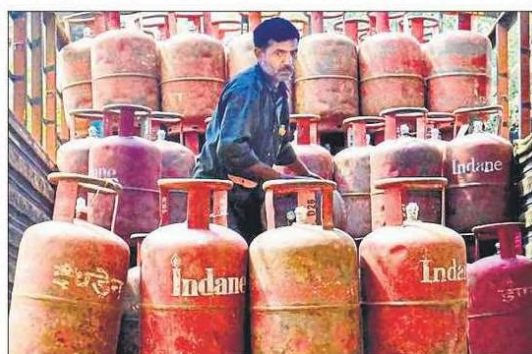
once operational, the cost to households would depend on high-rise to low-rise connections, with an average cost of ₹11,000-12,000 per connection.

Though, there are no provisions of subsidies provided for consumers during fitment, said officials.

However, delays in approvals and coordination issues in some residential areas have slowed progress. Deputy commissioner Ajay Kumar said, "Applications for PNG pipeline work should be approved on priority so that the expansion work is not hindered."

According to officials present in the meeting, sub-divisional magistrates (SDMs) have been tasked with resolving bottlenecks and coordinating with RWAs and local representatives.

Meanwhile, Residents in sectors including Sector 102 reported delays despite pipelines being laid, citing pending clearances. In response, officials said such issues are under review.



A worker unloads LPG cylinders at a gas agency in Gurugram. PTI

City gets a 24x7 LPG control room, helpline

Leena Dhankhar

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GURUGRAM: The district administration on Tuesday set up a dedicated 24x7 control room at the Mini Secretariat to address complaints related to LPG supply and curb black marketing, hoarding, and illegal diversion of domestic cylinders, officials said.

The control room, established in the NIC room on the second floor, can be reached at 0124-2868930. Residents can report issues such as delayed delivery, non-availability, overcharging, black marketing, and illegal storage. Officials said this is the first time such a control room has been set up.

Deputy commissioner Ajay Kumar said, "Strict monitoring and enforcement drives are being carried out by the food, civil supplies and consumer

affairs department to prevent any inconvenience to the public and to ensure a smooth and fair distribution." District food and supplies controller Dr Ashok Rawat added, "Complaints related to black marketing and illegal storage will be promptly verified, and strict action will be taken against violators."

Officials said LPG supply remains stable, with 15.311 cylinders stocked across 58 agencies. Six field teams have been deployed for daily inspections at agencies, storage facilities, and suspected locations.

Separately, 64 empty domestic cylinders were seized during a raid in Gairatpur Bas village, Badshahpur, on Monday evening. The owner, Harinder Singh, 35, was taken into custody, and an FIR under sections 7, 10 and 55 of the Essential Commodities Act was registered, police said.

TALKS WITH JAISHANKAR ON CARDS

Lavrov to visit Delhi mid May for BRICS meet

Shubhajit Roy
New Delhi, March 31

RUSSIAN FOREIGN Minister Sergey Lavrov is planning to visit New Delhi on May 14 and 15 to participate in the meeting of foreign ministers of the BRICS countries, the visiting Russian Deputy Foreign Minister Andrey Rudenko told TASS news agency.

According to TASS, the Russian Deputy Foreign Minister said, "Russian Foreign Minister Sergey Lavrov plans to take part in the BRICS ministerial meeting on May 14-15 this year, which will determine the... general outlines of the final documents that the Indian presidency will submit to the BRICS summit."

On the sidelines of BRICS events, a separate working visit by Lavrov will take place to meet External Affairs Minister Jaishankar and other Indian officials.

Rudenko said, "In connection with the BRICS events, it is also planned to hold a separate working visit by Lavrov to India to meet with Foreign Minister Subrahmanyam Jaishankar and other Indian officials."

India holds the BRICS presidency in 2026, and consensus on the issue of the war in West Asia has been elusive.

As India is looking at increasing LNG and LPG supplies from Russia, Jaishankar and Foreign Secretary Vikram Misri met Russian Deputy Foreign Minister Rudenko on Monday. This comes at a time when Delhi is facing a shortage of energy in the wake of the war in West Asia – which has completed 30 days now.

After the meeting, Jaishankar had said that they spoke



Russian Foreign Minister
Sergey Lavrov

E. EXPLAINED

Energy security high on agenda

RUSSIAN OIL imports have significantly cushioned India's war-hit energy supplies, even as much of the world reels under a stocks shock. Lavrov's visit might pave the way for even greater cooperation on energy, as well as firm up a united BRICS response to the war.

about further advancement of wide-ranging cooperation, as well as regional and global developments.

The Ministry of External Affairs (MEA) official spokesperson Randhir Jaiswal had said that both sides reviewed the full spectrum of Special and Privileged Strategic Partnership and shared perspectives on bilateral, regional and global issues of mutual interest.

According to TASS, on March 27, Russia and India had expressed readiness to increase LNG supplies. Delivery of LPG to India is also being discussed, a source in the oil and gas industry told TASS.

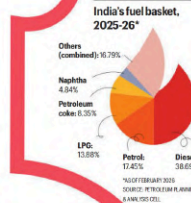


Regulated gas price for ONGC, OIL raised

New Delhi: The Centre has raised the administered price mechanism gas price for state-run producers Oil and Natural Gas Corporation (ONGC) and Oil India Ltd (OIL) to \$7 per mmBtu, up from \$6.75 per mmBtu, according to an official notification. The revision applies to gas produced from legacy fields under regulated pricing regime. Under revised norms, the price of such natural gas produced from old and legacy fields, which were given to ONGC and OIL without bidding, is determined as 10% of the monthly average of Indian Crude Basket and is notified on a monthly basis. PTI

Lives stalled over LPG

A cook who struggles for a cylinder while the fuel is abundant at the homes she works in, a village of Ujjwala beneficiaries where women have gone back to cooking on firewood, an Eid that went without celebrations — the LPG crisis has hit the most vulnerable



DELHI NCR

Ashima's new stove: A beaten-up tin can

Ushika Singhal

Around 8 pm on March 8, far away from the untiring rattle in West Asia, a straggling woman came to an abrupt halt. The fire stopped bubbling. "Aren't you doing anything?" Ashima Begam was calling out to her husband, Magsood, from her makeshift kitchen in the common area that she shares with her neighbours.

That day, Ashima, who lives in Motia village in Noida's Sector 35 and works as a cook in homes nearby, had returned home late from her evening shift. The family had been waiting for her to come to break their fast.

She stood there for a few minutes as her mind raced. "Ab kya karoon? (What do I do now?) Magsood and the kids haven't eaten anything since their supper (pre-dawn meal) of roti, salad and fruits."

Magsood, the sales, looked annoyed. So she simply took the pot of half-cooked dal over to her neighbour, Alina, and cooked it there.

"The gas always runs out when we least expect it to. But we usually call the agent and get a cylinder almost immediately. This time, we have been without gas for almost a month," says Ashima, 45.

With Iran shutting off the Strait of Hormuz, the key transit route for oil and gas out of the Middle East, the ripple effect almost immediately in India restaurant run out of fuel and people complained of long waiting times for LPG.

With the scarcity cause reports of hoarding, leading authorities in Delhi, Mumbai, Hyderabad, Bangalore and elsewhere carrying out raids and seizures. The government has increased the waiting period for cylinder refill from 21 days to 28 in urban areas and 45 in rural areas, but the wait often extends much beyond this.

The wait is not just for the cylinder, but also for the gas. In homes like Ashima's, the disruption was still.

Originally from Kurpur, Ashima moved to Haridwar around 20 years ago, where she married Magsood, a daily wage earner. A few years later, after Magsood



Ashima Begam at her home in Noida, cooking on a stove carved out of an old tin can. (Sourabh)

"This has happened before — the cylinder runs out of gas when we least expect it to. But we usually call the agent and get a cylinder almost immediately. This time, we have been without gas for almost a month."

ASHIMA BEGAM

COOK AND SALES

developed a long condition that made it difficult for him to do manual labour, the couple moved to Delhi. As Magsood looked for jobs, Ashima earned by working in homes as a cook and cleaning, bringing up their three children — two daughters and a son.

Ashima's house lies at the far end of a narrow lane, squeezed tighter by the open drains running on either side. Children run barefoot, o-sickshaws and scooters brush past the walls as dogs chase them, and this, with a few more of the same, is the scene of their daily lives.

Her one-room house is part of a half-constructed building. She shares a common area — crowded with buckets of water, boxes of spices, and her new defunct gas stove — with four other rooms. During the day, the women gather here, chatting as they cook, wash clothes, and

scrub utensils. In a far corner lies a heap of construction waste.

For Ashima and her neighbour, registering for a formal gas connection is a distant dream. Magsood tried to register for a gas connection earlier but always found himself a few documents short.

In the end, says Magsood, getting all the documents was so complicated and tiresome that he gave up and decided to buy LPG cylinders in the black market.

He says they usually buy a 14 kg cylinder for Rs 1,000-500 from an LPG supplier. But with the recent tightening of rules, suppliers have dried up.

The day they ran out of gas, Magsood called his LPG supplier, who told him the demand was so high that there was "no chance" he would get a cylinder that day.

The next day he called two and gave me two options. I could either buy a full 14 kg cylinder for Rs 4,000 or take a half full cylinder for Rs 2,000. I usually get a full cylinder for Rs 1,000 and it lasts us at least a month. I even went to the gas agency to enquire if I can apply for a new gas connection, but they said no now," he says.

The LPG supplier, from whom Magsood usually buys in black, says his business has taken a hit. "Earlier, we would buy cylinders from the agency workers at the godown," after March 8 the workers said they can't risk their jobs selling to me. A few days later, the police raided my stash of cylinders," he says, adding that rates within the shallow economy have risen exponentially.

For the next few days after they ran out of gas, the family ate the meals that the

local mosque distributed for Ramadan. But the mosque was around 3 km away and Ashima couldn't have walked the distance everyday. So she picked up a discarded, beaten-up can and improvised a stove by moving it out of the main circle at the base of the tin. She then collected some twigs from a park near her workplace, fished out pieces of paper and plastic from the construction dump in their building, shoved some of it into her tin, dabbled and got it working.

But the dabbles is too small to cook anything elaborate. She recalls how the family had to substitute dal for days ago with a small bowl of ajeerai shared between the five of them. "I couldn't even make dahi bhalla or bhajant for the children," says Ashima.

As Ashima sits outside her room, throwing chillies, garlic and onions into the sizzling oil, her neighbour Kusma walks by. "Oh, cylinder mein (Oh my god, a cylinder?)" she asks. Ashima laughs.

"Can't you see how I am cooking? Ek mukhina kare hai (It's been nearly a month without a cylinder)."

From the common area of the building, Ashima's neighbour Shanti peeps into her room. Holding her "Ajada", her LPG customer card, she says, "I am in line and on 2.04 right and got a gas cylinder under the next morning at 9," she says.

A few metres away from Ashima's house, outside the village school, a long queue winds along the boundary walls. A line of at least 100 empty cylinders, chained up together, stands nearby. People scribble around the cylinders, some at

them and a few lie down on mats beside them. With the sun about to set, outside a mosquito net and begins putting it up.

Melina says. She says she has been standing in the queue since 7.30 pm the previous day. It has been over 20 hours since she first set her empty cylinder down at the end of the line.

Adish, Macklin separates the apartment building where Ashima works from her black neighbourhood in Motia.

Around 6 pm, Ashima leaves for her evening shift — she has to cook dinner at two homes. During the short walk, Ashima talks about her younger daughter's wedding that's scheduled to be held at their village in Haridwar late April. "I am so nervous about the wedding in our village. There's no tension about gas there... everything is cooked on big dabbles, and the roti in the tandoor. We'll have to feed at least 100 people," she says.

As Ashima crosses the bridge over the drain, the first sign of the fuel dividers comes in view — pillars that disfigure the walls of the buildings, carrying PNG (Piped Natural Gas) in homes.

The rich have it easy. They don't have to worry about empty cylinders," says Ashima. "The thought of going back home and lighting the chulha... My daughters have never used a chulha so they don't even help me with the cooking," she says.

At the first home, Ashima walks in with ease. As she cooks some *subzida Acha Bahar* for some *pagal*, the woman of the house (a government employee who didn't want to be identified), "We have pipelined, so we have no problems." Her husband, who has just returned from work, says, "It's strange how this was in the past. When I was a student, there was five-day passes, my stocks rose... then what would they use? I remember my motorcycle crashed. In the end, it will be the common people who pay for this war."

At the second home, Ashima sets the second home, where she is asked to make *pooris*, but never potatoes and *masa* *malikona*. "I thought there would be a proper *phajant* by now," says the house owner. "It may take some time, but people are getting cylinders, aren't they? Anyway, you are always by my side."

Around 8 pm, by the time she wraps up her work, the crowd has thinned on the road outside and the street lights do little to light up the dark corners. "Don't worry, I am used to this... Anyway, our arm is always full of people," she laughs, heading towards the dark that lies ahead to the other side, where her home and the chulha await.

RAISEN, MADHYA PRADESH

Ujjwala gave them smoke-free kitchens, but now, dung-cake stoves are back

Anand Mohan J

ANCHALKALA is a village of around 60-70 homes nestled amidst the famous Bhamberia rock caves, in Madhya Pradesh's Bhopal district. It was five years ago that a residential colony under the Pradhan Mantri Ujjwala Yojana, an scheme aimed at bringing LPG connections to rural households. With that, its kitchens moved from firewood to gas stoves, offering women a smoke-free, dignified way of cooking.

But now, the chulhas has returned to Anchalkala. The smoke from their clay stoves, fed with cow dung cakes and firewood, rises before 5 am, an hour earlier because the women have to accommodate the extra effort and time it takes to cook on the dabbles.

While a worker official in the Food and Civil Supplies Department claimed there was "adequate supply," LPG bookings have surged across Madhya Pradesh, leading to ration, Anchalkala, at the end of the freight last-mile supply chain, simply walk away.

The smoke rises from Anupriya Jainwal's house. She has to cook for 12 people in the Jainwal household, a joint family where the men often on Saecis and doing up as factory workers.

By the time the first light touches the Bhamberia ridge, Anupriya is already on her knees at the chulha, arranging cow

dung cakes in a specific geometry. It's a skill the 65-year-old learned from her mother, but had fallen into disuse since she started cooking on gas. Dried grass goes in next and then, the firewood, balanced across the top of the clay hearth. It takes 10 minutes of coaxing before the flames pop up. — 10 minutes to reflect the smoke, fending no redegarrett from the low kitchen ceiling, pools and descends.

Anupriya's eyes are already watering. The dabbles has barely begun. "One gas stove did cook in 15 minutes," she says, wiping her face with her dupatta. "Now it takes over an hour. You cannot make a dabbles."

Most women in Anchalkala have LPG connections. For nearly a decade, they've

got used to the cylinders, the chulhas were pushed to corners, used occasionally for winter warmth or festival cooking. Women also stopped stacking cow dung cakes outside their doors. Now the dung cakes are back. It burns hotter and drier than wood, releasing a smoke that settles into the lungs and eyes.

When the family ran out of gas two weeks ago, they were walked into the forest to collect firewood. The Bhamberia Tiger Reserve begins exactly where Anchalkala's fields end. Now, every morning, men with axes and ropes walk across that boundary.

"We risk our lives to collect firewood," says Sunil Jainwal, Anupriya's nephew who works at a local factory as a labourer.

Anupriya collects firewood in Anchalkala village. (www.siv)

Ujjwala Santosh Kute, 40, Mumbai

Ujjwala runs a chapari business in Dhartiagar with a friend. Until recently, they would supply up to 2,000 cylinders a day to canteens, fire services and hospitals. About 10 days ago, Ujjwala's cylinder ran out. With no refill in sight, the business came to a halt. For now, she is taking on a single order from a hospital that has provided her with a cylinder. "I make about 400 rupees for them," she says. Beyond that, there's little she can do. "It's like Covid, there's nothing anybody can do. Thankfully, my daughter and husband work, so we can manage for now." Then, she asks, "Can you arrange a cylinder for me?" — HEENA KHANDEKAR

Hari Pal, 27, Surat

Hari Pal plans to go home to Gaya, Bihar, with his wife and five-year-old son on April 12, two days after he gets his salary on April 12. "I had planned to go home. But the LPG crisis is making it difficult for me to stay," says Hari Pal, who does not have a gas connection and usually buys his LPG cylinder in black. "Earlier, we would get LPG cylinder refilled for Rs 100, but now, the LPG supplier is asking for Rs 600. (We were asked for a second refill), they refused," says Pal. From his home in the Ganeshpur migrant labour colony at Pandhara in Bihar. "My wife now cooks on this stove," he says, pointing to a metal bucket that his wife Seema has turned into a coal-fired chulha. — KAMAL SAHAY

Saroja KM, 53, Bengaluru

A clerk at an aided school, Saroja has been anxious about her cylinder running out of gas. She has made a couple of visits to her LPG supplier, asking for her gas cylinder to be refilled. "When I tried booking in the first week of March, the agency said they were not making any bookings. Finally, in second week of March, I made the payment online. But so far, I have not got the cylinder," says Saroja, who runs a family of four. She visits the agency, 8 km from home, haven't been pleased. "The last time, we, an employee could field notes taken family to the restaurant if we ran out of gas. I got into a fight," she says. "The cylinder may run out of gas any moment, with 20 cents." — KIRANRAJAN

BJP vows 2 free LPGs per year; ₹3K pension

Vishnu Varma

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THIRUVANANTHAPURAM: The Bharatiya Janata Party (BJP) on Tuesday promised two free LPG cylinders per year—one each during Onam and Christmas—for poor households, a Bhakshya-Arogya Suraksha card with a monthly recharge of ₹2,500 for women from poor and BPL households and an All India Institute of Medical Sciences (AIIMS) as it released a 16-point manifesto for the April 9 assembly elections.

The manifesto, unveiled by BJP national president Nitin Nabin in the state capital Thiruvananthapuram, has been branded as a 2026-31 blueprint for “vikasita Kerala” (developed Kerala), also promised monthly social welfare pension of ₹3,000, a total of 20,000 litres of free water for each household and a new high-speed railway network.

In his speech, after releasing the manifesto, Nabin claimed that decades of successive LDF and UDF governments in Kerala resulted in “negligible industrial growth, economic stagnation and fiscal misgovernance in the state”.

He also accused both the fronts of following an appeasement policy toward a certain community, which hurt the sentiments of other faiths and beliefs, and promised that the NDA was committed to ensuring transparency, accountability, and greater participation of devotees in the affairs of shrines in Kerala.

“We will protect Sabarimala, Guruvayoor and all other places of worship by revamping Devas-



Major highlights

-  **2 free LPG cylinders per family (one each on Onam, Christmas)**
-  **₹3,000 monthly social welfare pensions**
-  **20k litres of free water to every family per year**
-  **'Bhakshya Arogya Suraksha Card' to BPL women**
-  **CBI probe into the Sabarimala gold misappropriation case**

wom Boards to increase participation of devotees in temple management,” he said.

The manifesto also promised to launch a “Sabarimala Infrastructure Development Mission”, a CBI probe into the gold theft and large-scale devotee-centric infrastructure development at the hill-top shrine.

One of its key promises is handing a “Bhakshya Arogya Suraksha Card” to every woman from poor and BPL households with a monthly recharge of ₹2,500. The card can be used at pharmacies and grocery stores, protecting the beneficiaries from price fluctuations in the market.

The other crucial announcement is hiking the monthly social welfare pensions to ₹3,000 from the current ₹2,000 being dispensed by the LDF government. The pension would be paid to all women heads of poor

households, senior citizens above the age of 70 and widows.

Additionally, two free LPG cylinders per year, one each during Onam and Christmas, will be provided to poor families, Nabin said.

On the agriculture front, the party has promised minimum support price (MSP) for all crops requiring support and amending existing forest and land laws to allow plantation farmers to go for multi-crop agriculture. If elected to power, the BJP declared that it will set up an AIIMS hospital, a long-pending demand of the state.

The party further promised a high-speed railway corridor between Thiruvananthapuram and Kannur, completion of all phases of the Kochi Metro and additional Metro services in Kozhikode and Thiruvananthapuram.



With PTI inputs



India's coal backbone holds firm to support citizens amid global gas disruptions



Amid West Asia tensions disrupting LNG flows via the Strait of Hormuz, India is witnessing early energy stress. PM Narendra Modi termed the situation “concerning” but assured preparedness. Industrial clusters face CNG/LPG shortages, prompting a shift to coal. With gas-based power underutilised, coal demand is rising, reflected in higher e-auction premiums. Despite firming demand, adequate domestic supply and healthy stock levels continue to keep the situation stable.

Diesel worries rise as rabi crops ripen

Farmers want loose sale rule eased; Centre says stocks are sufficient

Vijay C. Roy & Rituraj Baruah

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NEW DELHI: As March turns to April and ripe fields stretch till the horizon, farmers look forward to a season of prosperity. This time around, anxiety is rising. The war in West Asia has brought strict curbs on diesel sales, raising concerns that the machines that do the heavy lifting at this time of year may struggle for fuel. Farmers said the ban on loose fuel sales—designed to curb illegal storage and misuse—has heightened uncertainty.

“Any disruption in harvesting will not only impact crop quality but also delay procurement, affecting overall farm incomes,” said Bhanu Pratap Singh, a farmer based in Uttar Pradesh. With the wheat harvest window being narrow and weather-sensitive, stakeholders warn that ensuring an uninterrupted diesel supply will be crucial to avoid operational bottlenecks and safeguard output in the country’s key grain-producing regions.

Following a government advisory, fuel stations now supply fuel only to vehicles or authorized bulk buyers, making it difficult for farmers—especially in



Demand for diesel for harvesters and tractors surges as farmers begin to reap wheat around 10 April. MINT

remote villages—to store diesel for uninterrupted farm operations. The ₹22 per litre hike in industrial diesel prices has also raised concerns about higher costs. The Kisan Mazdoor Sangharsh Committee, Kirti Kisan Union, and Sanyukt Kisan Morcha, and farmers across northern states such as Punjab, Haryana, Rajasthan, and Uttar Pradesh are now planning to raise the issue with authorities.

The Centre has maintained that there is adequate stock of crude oil, petrol and diesel, as India’s oil import sources are diversified and most of the oil comes from outside West Asia. On Tuesday, the petroleum ministry said panic-buying driven by rumours has been observed in certain areas, leading to unusually high sales and crowding at retail outlets. “However, adequate stocks of petrol and diesel are available at all petrol pumps across the country,” it said, reit-

erating its advice to the public not to believe rumours.

Fuel demand for harvesters and tractors surges as the harvest season begins around 10 April in India, where agriculture accounts for about two-fifths of the annual diesel demand of about 92 million tonnes. Wheat production is expected to hit a record at 120.21 million tonnes in the rabi marketing season (2026-27), around 2.26 million tonnes more than the previous year, according to the government estimates.

The Union petroleum ministry on 13 March advised states and petrol pumps to stop selling petrol and diesel in containers to prevent panic buying. The move followed the blockade of the Strait of Hormuz, as Iran reacted to US-Israel strikes on its energy infrastructure.

Queries emailed to the spokespersons of the ministries of agriculture and farmers’ wel-

fare, and petroleum and natural gas remained unanswered until the press time.

To be sure, the Petroleum and Explosives Safety Organization under the commerce ministry discourages loose sale of transport fuels due to safety concerns. But the norms were not implemented strictly until the government advisory.

Farmers normally prepare for the peak harvesting period by filling tractor and harvester tanks in advance and purchase diesel in containers for later use, said Rattan Randhawa, a farmer from Deo in Punjab’s Taran Tarn district. “This practice allows them to avoid repeated trips to fuel stations during the short and labour-intensive harvest window, when every hour is critical to prevent crop losses. This has been the usual process so far.” Farmer organizations now plan to approach the authorities to consider temporary relaxations or introduce alternative mechanisms to ensure timely fuel availability during the peak agricultural season.

A district-level meeting with farmers has been scheduled on 6 April, a farmer association representative said. “We also plan to submit a representation to the Deputy Commissioner concerned, urging that the sale of diesel in loose form be permitted during the harvesting season,” said Raminder Singh, press secretary of the Kirti Kisan Union and national coordination committee member of Sanyukt Kisan Morcha.

India diesel exports to SE Asia at 7-yr high

Reuters

feedback@livemint.com

SINGAPORE: India’s diesel exports to Southeast Asia surged to the highest in more than seven years in March, shipping data showed, as traders pivoted supply to cover short positions and refiners cashed in on higher profits in Asia caused by the US-Israeli war with Iran.

The surge in exports could boost spot sale margins for Indian refiners who have purchased large volumes of prompt Russian crude to replace Middle East supply disrupted by the war.

About 1 million metric tonnes (7.45 million barrels) of diesel have been shipped on this trade route, according to data from analytics firm Kpler and three trade sources, with around half of the volumes bound for Singapore.

Around 90% of these volumes were shipped by Reliance Industries, Kpler data showed, operator of the world’s largest refining complex.

Reliance did not immediately respond to a Reuters request for comment.

Traders tapped India’s diesel supply for Southeast Asia and Australia after the Middle East conflict disrupted crude sup-

plies to Asia, leading refineries to cut output and countries including China to ban exports of refined products.

“Asian buyers that usually rely on Chinese and northeast Asia must seek alternative supply, with India’s Reliance being one of the main candidates in the region,” analysts from consultancy FGE NexantECA said.

India is known as a swing supplier in global oil markets as it can sell its refined products either to Europe or Asia, whichever is more profitable.

These shipments will help to ease supply tightness going into April, traders said.

Some analysts expect the trend to last in the near term despite the Indian government reinstating export taxes for diesel.

Sparta Commodities’ analyst James Noel-Beswick said its arbitrage calculations suggested that the trade flow can continue into August at least.

“India appears firmly committed to keeping its refineries at capacity, and Washington’s rather permissive stance on both Russian and Iranian purchases has given it the means to do so,” he added.

The U.S. has issued temporary waivers for the sale of Russian and Iranian oil cargoes at sea to ease global prices.

यूरोप को ईंधन निर्यात में आई भारी गिरावट

प्रतिबंधों तथा यूरोप और पश्चिम एशिया में छिड़े युद्धों का पड़ा प्रभाव

एस. दिनकर
हैदराबाद, 31 मार्च

पश्चिम एशिया और यूरोप में अलग-अलग मोर्चों पर चल रहे युद्ध तथा यूरोपीय संघ (ईयू) के नियमों में बदलाव के कारण 10 अरब डॉलर मूल्य के साथ देश के पांचवें सबसे बड़े ईंधन निर्यात केंद्र यूरोप के लिए तेल निर्यात में मार्च महीने के दौरान भारी गिरावट आई है।

शिपिंग डेटा और उद्योग के वरिष्ठ अधिकारियों के अनुसार, सबसे बड़े तेल उत्पाद निर्यातक रिलायंस इंडस्ट्रीज लिमिटेड (आरआईएल) सहित भारतीय रिफाइनरियों ने इस महीने यूरोप को अब तक की सबसे कम 18,000 बैरल प्रति दिन ईंधन की आपूर्ति की है। यह मासिक हिसाब से 80 प्रतिशत और सालाना 94 प्रतिशत गिरावट दर्शाता है। समुद्री डेटा प्रदाता केप्लर के अनुसार, भारत ने इस साल फरवरी में यूरोप को 89,000 बैरल प्रति दिन और मार्च 2025 में 286,000 बैरल प्रति दिन निर्यात किया था। जून 2020 को छोड़ दें, जब यूरोप को निर्यात लगभग शून्य था, तो इस साल मार्च में यह सबसे कम स्तर रहा। यूरोप के कारण भारत के समग्र

निर्यात में मार्च में 12 प्रतिशत (मासिक) आई है जो 140,000 बैरल प्रति दिन की गिरावट के साथ 10 लाख बैरल प्रति दिन रहा। केप्लर डेटा से पता चलता है कि यूरोप को शिपमेंट रुकने से 2026 की पहली तिमाही में भारत की विदेशी बिक्री 200,000 बैरल प्रति दिन तक कम हो गई, जो पिछले साल 12.9 लाख बैरल प्रति दिन की तुलना में 10.9 लाख बैरल प्रति दिन पर आ टिकी। इसका सीधा असर राजस्व पर भी पड़ेगा जो सरकार डीजल और जेट ईंधन पर निर्यात कर के रूप में वसूलती है। उद्योग सूत्रों ने कहा है कि यूरोप के लिए निर्यात में सुधार होगा या नहीं, इस बारे में अभी कुछ नहीं कहा जा सकता, क्योंकि यूरोपीय संघ ने जनवरी से रूसी कच्चे तेल से बने ईंधन के आयात पर प्रतिबंध लगा दिया था। इस फैसले ने भारत को झटका दिया है। एक वरिष्ठ रिफाइनर अधिकारी ने कहा कि यह प्रतिबंध सार्वजनिक क्षेत्र की कंपनियों के लिए कोई मायने नहीं रखता, क्योंकि यूरोप को रिलायंस द्वारा आपूर्ति की जा रही थी। रिलायंस ने बाजार संबंधी मामलों पर टिप्पणी करने से इनकार कर दिया है।



रेटिंग एजेंसी इक्रा के वरिष्ठ उपाध्यक्ष प्रशांत वशिष्ठ ने कहा, 'पश्चिम एशिया से बड़ी मात्रा में ईंधन निर्यात बाधित हुआ है। इसे सामान्य होने में अभी समय लगेगा। इसलिए, मुझे लगता है कि यूरोप फिर भारत की तरफ आएगा।' उन्होंने कहा कि यूरोप को रिलायंस की आवश्यकता होगी, क्योंकि 2025 में यूरोप को कुल डीजल और जेट ईंधन आयात में इस रिफाइनर की हिस्सेदारी 15 प्रतिशत तक थी। वैकल्पिक तौर पर यूरोपीय संघ अमेरिका से ईंधन पर और भी अधिक निर्भर हो जाएगा।

पिछले सप्ताह यूक्रेन द्वारा रूसी बाल्टिक सागर बंदरगाहों और रिफाइनरियों पर किए गए ड्रोन हमलों के बाद ईंधन बाजारों में और परेशानी खड़ी हो गई है। इससे रूस से ईंधन निर्यात प्रभावित हुआ है। इस बीच, रूस बुधवार (1 अप्रैल) से गैसोलीन निर्यात पर प्रतिबंध लगाने की योजना बना रहा है। यूरोपीय संघ ने कड़े प्रतिबंध

लगाए हैं, जिनमें इसी जनवरी से रूसी तेल से बने डीजल और जेट ईंधन के आयात पर रोक भी शामिल है। यूरोपीय संघ का तर्क है कि ये प्रतिबंध तब तक जारी रहेंगे जब तक निर्यातक कंपनियां रूसी तेल से तैयार ईंधन और अन्य देशों से मिलने वाले कच्चे तेल से तैयार ईंधन की लाइनों को अलग-अलग न कर लें। यूके के उद्योग प्रकाशन अर्गस के अनुसार, एक तथाकथित 'टी2' नियम के तहत सीमा शुल्क को मंजूरी मिलने के बाद ईंधन यूरोपीय संघ के भीतर स्वतंत्र रूप से बेचा जा सकता है। मतलब यह कि यदि नीदरलैंड में सीमा शुल्क मंजूर हो चुका है तो शिपमेंट फ्रांस या जर्मनी में वितरित किया जा सकता है। लेकिन अन्य खरीदारों को अतिरिक्त कागजी कार्रवाई पूरी करने पर ही यह मिलेगा। अर्गस ने कहा कि यह कागजी कार्रवाई एनर्जी लीप क्लॉज है, जिसके तहत रिफाइनरी को यह बताना होगा कि

उसने लोडिंग से 60 दिन पहले तक रूसी कच्चे तेल का उपयोग नहीं किया है। लेकिन भारतीय रिफाइनरिंग से जुड़े दो वरिष्ठ अधिकारियों ने कहा कि यूरोप में कुछ बड़े व्यापारी और तेल कंपनियां यूरोपीय संघ के प्रतिबंधों की गलत व्याख्या कर रहे थे, क्योंकि जामनगर रिफाइनरी कॉम्प्लेक्स में रिलायंस की दोनों सुविधाओं का स्वामित्व अलग-अलग संस्थाओं के पास है। केप्लर डेटा और सूत्रों के अनुसार, इस साल रिलायंस द्वारा यूरोप में फ्रांस, जर्मनी, नीदरलैंड और तुर्की को कार्गो भेजे गए हैं।

अधिकारियों ने कहा कि रिलायंस की रिफाइनरियां पाइपलाइन और उपकरण आदि अलग-अलग कूड लोडिंग प्लेटफॉर्म का उपयोग करती हैं। रिलायंस के एक अधिकारी ने बताया कि कंपनी ने नवंबर 2025 से ही अपनी एसईजेड में स्थित रिफाइनरी में 704,000 बैरल प्रति दिन रूसी तेल का प्रसंस्करण बंद कर दिया है। यानी इस रोक को 30 मार्च, 2026 तक 150 दिन का समय हो चुका है। शिपिंग डेटा से पता चला कि डोमेस्टिक टैरिफ एरिया प्लांट 6,60,000 बैरल प्रति दिन रूसी तेल का उपयोग कर रहा है। रिलायंस ने इस महीने 3,82,000 बैरल प्रति दिन रूसी तेल आयात किया, जो देश के लगभग 20 लाख बैरल प्रति दिन आयात का 19 प्रतिशत होता है।

पीएनजी के विस्तार में तेजी, मार्च में 2.7 लाख नए कनेक्शन जोड़े

नई दिल्ली, 31 मार्च (भाषा)।

भारत ने मार्च महीने में पाइप के जरिये आपूर्ति की जाने वाली रसोई गैस (पीएनजी) के 3.1 लाख से अधिक नए कनेक्शन के लिए गैस की आपूर्ति शुरू की थी है, जबकि जबकि 2.7 लाख अन्य नए कनेक्शन जोड़े हैं। पश्चिम एशिया में जारी युद्ध के कारण होर्मुज जलमार्ग के बंद होने से रसोई गैस (एलपीजी) की आपूर्ति में आई बाधाओं के बीच सरकार ने स्वच्छ ईंधन नेटवर्क के विस्तार को और तेज कर दिया है।

होर्मुज जलमार्ग वह महत्वपूर्ण समुद्री मार्ग है जिसके माध्यम से भारत अपना अधिकांश एलपीजी का आयात करता है। युद्ध के कारण इस मार्ग के प्रभावित होने से एलपीजी की आपूर्ति में दिक्कतें आई हैं। हालांकि, देश की प्राकृतिक गैस की अधी जरूरत स्थानीय उत्पादन से पूरी होती है और शेष हिस्से के लिए सरकार ने विभिन्न विदेशी स्रोतों से इंतजाम किए हैं। पेट्रोलियम मंत्रालय ने बयान में बताया कि मार्च के दौरान घरों, व्यावसायिक प्रतिष्ठानों, छात्रावासों और कैम्पस सहित 3.1 लाख से अधिक कनेक्शन के

लिए गैस की आपूर्ति शुरू की गई है। इसका आशय है उन पाइपलाइन में गैस की आपूर्ति शुरू कर दी गई जहां पहले से कनेक्शन मौजूद थे। इसके अलावा, इसी महीने 2.7 लाख नए आवेदन स्वीकार कर कनेक्शन दिए गए हैं। फरवरी के अंत तक भारत में 1.64 करोड़ घरेलू पीएनजी कनेक्शन थे।

सरकार ने अब इस विस्तार अभियान को जून के अंत तक बढ़ा दिया है और शहरी गैस वितरण कंपनियों को निर्देश दिया है कि वे छात्रावासों और सामुदायिक रसोई जैसे स्थानों पर प्राथमिकता के आधार पर कनेक्शन दें।

सरकार ने स्पष्ट किया है कि देश में पेट्रोल और डीजल का पर्याप्त भंडार मौजूद है और रिफाइनरी पूरी क्षमता से काम कर रही हैं। प्राकृतिक गैस की आपूर्ति में धरो और सीएनजी को प्राथमिकता दी जा रही है, जबकि औद्योगिक इकाइयों को उनकी औसत खपत का लगभग 80 फीसद हिस्सा दिया जा रहा है। बयान के अनुसार, एलपीजी का वितरण वर्तमान में स्थिर है और मार्च में प्रतिदिन औसतन 50 लाख से अधिक सिलेंडर की आपूर्ति की गई है।

रूस से तेल आयात मार्च में नौ महीनों के उच्चतम स्तर पर

शुभांगी माथुर
नई दिल्ली, 31 मार्च

पश्चिम एशिया से तेल की आपूर्ति कमजोर होने के बीच भारत का रूस से कच्चे तेल का आयात मार्च में नौ महीनों के उच्चतम स्तर 19.6 लाख बैरल प्रतिदिन (बीपीडी) के स्तर पर पहुंच गया। भारत ने फरवरी में केवल 10.4 लाख बीपीडी रूसी तेल खरीदा था। समुद्री मार्गों से परिवहन पर नजर रखने वाली कंपनी केप्लर ने ये आंकड़े जारी किए हैं।

अमेरिका द्वारा समुद्र में फंसे रूसी कच्चे तेल और पेट्रोलियम उत्पादों को खरीदने के लिए देशों को 30 दिनों की छूट देने के बाद भारतीय तेल शोधन (रिफाइनरी) कंपनियों ने



मार्च में रूस से कच्चे तेल की खरीद बढ़ा दी। यह छूट 11 अप्रैल तक जारी रहेगी। अमेरिका के साथ व्यापार समझौते पर बातचीत और अमेरिका तथा यूरोपीय संघ (ईयू) द्वारा रूस पर लगाए गए विभिन्न प्रतिबंधों के कारण भारत ने दिसंबर 2025 से

रूस से कच्चे तेल की खरीद कम कर दी थी। फरवरी में अमेरिका ने भारत के साथ एक व्यापार समझौता किया और रूस से तेल खरीदने पर लगने वाला 25 प्रतिशत जुर्माना हटा दिया। राष्ट्रपति डॉनल्ड ट्रंप ने दावा किया कि भारत ने रूस से तेल की खरीदारी पूरी तरह रोकने पर सहमति जताई है।

(शेष पृष्ठ 7 पर)

रूस से तेल आयात मार्च में नौ महीनों के उच्चतम ...

पृष्ठ 1 का शेष

पश्चिम एशिया में जारी युद्ध के कारण वैश्विक आपूर्ति सीमित होने से भारतीय तेल शोधक कंपनियां घरेलू ईंधन की उपलब्धता सुनिश्चित करने के लिए रूस से तेल पर अत्यधिक निर्भर हैं। भारतीय तेल कंपनियां वर्तमान में रूस से तेल खरीदने के लिए लगभग 6-7 डॉलर प्रति बैरल अधिक रकम (प्रीमियम) चुका रही हैं जबकि युद्ध से पहले 8-10 डॉलर प्रति बैरल की छूट मिलती थी।

भारत कच्चे तेल का एक प्रमुख उपभोक्ता है और बढ़ती घरेलू मांग लेकिन स्थिर स्थानीय उत्पादन के बीच आयात पर इसकी निर्भरता 90 प्रतिशत तक पहुंच गई है।

इस बीच, मार्च में ईरान द्वारा होर्मुज स्ट्रेट से जहाजों की आवाजाही रोकने के कारण इराक, सऊदी अरब और संयुक्त अरब अमीरात (यूएई) जैसे पश्चिम एशियाई देशों से भारत को कच्चे तेल की आपूर्ति बाधित हुई। होर्मुज स्ट्रेट एक महत्वपूर्ण समुद्री मार्ग है। भारत अपने कच्चे तेल आयात का लगभग 40 प्रतिशत होर्मुज स्ट्रेट से प्राप्त करता है।

केप्लर के आंकड़ों के

अनुसार इराक से भारत का कच्चा तेल आयात 30 मार्च तक लगभग 75 प्रतिशत घटकर 2,40,000 बैरल प्रति दिन रह गया जबकि पिछले महीने यह 9,69,000 बैरल प्रति दिन था। सऊदी अरब से तेल आपूर्ति में भी 43 प्रतिशत की गिरावट आई मगर अगर मार्च में अब तक यह 576,000 बैरल प्रति दिन पर स्थिर रही जबकि फरवरी में आयात 10.1 लाख बैरल प्रतिदिन था। पेट्रोलियम उत्पादों के निरंतर निर्यात के लिए सऊदी अरब ने होर्मुज स्ट्रेट को दरकिनार करते हुए अपनी पूर्व-पश्चिम पाइपलाइन के माध्यम से तेल निर्यात बढ़ा दिया है।

यूएई से भारत की कच्चा तेल आपूर्ति मार्च में घटकर 2,07,000 बैरल प्रति दिन रह गई जबकि फरवरी में यह 5,54,000 बैरल प्रतिदिन थी। भारत ने अंगोला से कच्चे तेल का आयात लगभग तीन गुना बढ़ाकर 3,33,000 बैरल प्रतिदिन कर दिया जबकि मार्च में अमेरिका से आपूर्ति मामूली रूप से घटकर 1,67,000 बैरल प्रति दिन रह गई। भारत का कुल कच्चा तेल आयात मार्च में घटकर 44.5 लाख बैरल प्रति दिन रह गया, जो फरवरी में 51.7 लाख बैरल प्रति दिन था।

देश में एपीएम गैस की हिस्सेदारी करीब 60 फीसद

निर्णय

कीमत सात डालर प्रति 10 लाख ब्रिटिश थर्मल यूनिट

कुओं से निकलने वाली गैस की कीमत बढ़ाने का फैसला

नई दिल्ली, 31 मार्च (भाषा)।

सरकार ने सार्वजनिक क्षेत्र की कंपनियों ओएनजीसी और आयल इंडिया लिमिटेड द्वारा उत्पादित गैस की एपीएम कीमत बढ़ाकर सात डालर प्रति 10 लाख ब्रिटिश थर्मल यूनिट (एमएमबीटीयू) कर दी है जो पहले 6.75 डालर प्रति इकाई थी। एक आधिकारिक अधिसूचना में यह जानकारी दी गई।

कौमलों में यह संशोधन पुराने और विरासत वाले गैस क्षेत्रों से उत्पादित गैस पर लागू होगा, जो विनियमित मूल्य व्यवस्था (एपीएम) के तहत आती है। कीमत में इस वृद्धि का असर उर्वरक, सीएनजी और पाइप से होने वाली रसोई गैस आपूर्ति जैसे क्षेत्रों पर पड़ सकता है। देश के कुल घरेलू गैस उत्पादन में एपीएम गैस की हिस्सेदारी करीब 60 फीसद है और इसका उत्पादन लगभग 9.2 करोड़ मानक घन मीटर प्रतिदिन है। सरकार ने 2023 में स्वीकृत मूल्य निर्धारण व्यवस्था के तहत कौमलों में यह संशोधन किया है। इस व्यवस्था में पुराने क्षेत्रों से उत्पादित गैस की कीमत भारतीय कच्चा तेल बास्केट के मासिक औसत का 10 फीसद तय

कीमतों में यह संशोधन पुराने और विरासत वाले गैस क्षेत्रों से उत्पादित गैस पर लागू होगा, जो विनियमित मूल्य व्यवस्था (एपीएम) के तहत आती है। कीमत में इस वृद्धि का असर उर्वरक, सीएनजी और पाइप से होने वाली रसोई गैस आपूर्ति जैसे क्षेत्रों पर पड़ सकता है। देश के कुल घरेलू गैस उत्पादन में एपीएम गैस की हिस्सेदारी करीब 60 फीसद है और इसका उत्पादन लगभग 9.2 करोड़ मानक घन मीटर प्रतिदिन है। सरकार ने 2023 में स्वीकृत मूल्य निर्धारण व्यवस्था के तहत कौमलों में यह संशोधन किया है। इस व्यवस्था में पुराने क्षेत्रों से उत्पादित गैस की कीमत भारतीय कच्चा तेल बास्केट के मासिक औसत का 10 फीसद तय की जाती है और इसे हर महीने अधिसूचित किया जाता है।

की जाती है और इसे हर महीने अधिसूचित किया जाता है। हालांकि, आयल एंड नैचुरल गैस कारपोरेशन (ओएनजीसी) और आयल इंडिया लिमिटेड (ओआइएल) के पुराने ब्लॉकों से उत्पादित गैस की कीमत चार से 6.5 डालर प्रति एमएमबीटीयू के दायरे में तय थी। यह सीमा दो साल तक स्थिर रखी गई थी और उसके बाद हर साल कीमत 0.25 डालर प्रति एमएमबीटीयू बढ़ाने का प्रावधान किया गया। अधिकतम कीमत को 2025-26 से बढ़ाकर 6.75 डालर किया गया था और अब इसे बढ़ाकर सात

डालर प्रति एमएमबीटीयू कर दिया गया है। पेट्रोलियम योजना एवं विक्षेपण प्रकोष्ठ (पीपीएसी) के आदेश के मुताबिक, अप्रैल के लिए घरेलू प्राकृतिक गैस की कीमत सकल ऊर्जाव मान (जैसे-जैसे) के अंश पर 10.76 डालर प्रति एमएमबीटीयू तय हुई है, लेकिन एपीएम गैस के लिए यह निर्धारित ऊपरी सीमा के अधीन रहेगी। प्राकृतिक गैस का उपयोग उर्वरक उत्पादन, बिजली उत्पादन, वाहनों के लिए सीएनजी और घरों में पाइप से रसोई गैस पहुंचाने में किया जाता है।

केंद्र सरकार ने घरेलू ब्लॉकों से निकाली गई गैस की कीमत बढ़ाई

जागरण ब्यूरो, नई दिल्ली

केंद्र सरकार ने सरकारी क्षेत्र की दोनों प्रमुख पेट्रोलियम कंपनियों ओएनजीसी और ओआइएल के पारंपरिक गैस फील्डों से निकाली गई गैस की कीमत एक अप्रैल से बढ़ाकर सात डालर प्रति एमएमबीटीयू (ब्रिटिश थर्मल यूनिट-प्राकृतिक गैस मापने की अंतरराष्ट्रीय इकाई) कर दी है। घरेलू फील्डों से निकाली गई गैस की कीमत तय करने की अधिशासित व्यवस्था है जिसके तहत पेट्रोलियम व प्राकृतिक गैस मंत्रालय की तरफ से फैसला किया जाता है। अभी तक यह कीमत 6.75 डालर प्रति एमएमबीटीयू थी। कीमत में इस वृद्धि का असर उर्वरक, सीएनजी और पाइप से होने वाली रसोई गैस आपूर्ति जैसे क्षेत्रों पर पड़ सकता है।

वैसे कीमत वृद्धि का यह फैसला पश्चिम एशिया के मौजूदा विवाद से संबंधित नहीं है। वर्ष 2023 से सरकार ने घरेलू फील्डों की गैस की कीमत तय करने का नया फार्मूला तय किया है,

- ▶ ओएनजीसी और ओआइएल के ब्लॉकों से निकाली जाने वाली गैस की कीमत अब सात डालर प्रति एमएमबीटीयू होगी
- ▶ कीमतों में इस वृद्धि का असर उर्वरक, सीएनजी और पीएनजी आपूर्ति जैसे क्षेत्रों पर पड़ सकता है



प्रतीकात्मक

जिसके तहत ओएनजीसी व ओआइएल को घरेलू फील्डों से उत्पादित गैस के लिए 20 प्रतिशत तक प्रीमियम देने का प्रविधान है। वैसे अंतरराष्ट्रीय बाजार में पिछले एक महीने के दौरान प्राकृतिक गैस की कीमत बढ़कर 20-25 डालर प्रति एमएमबीटीयू तक पहुंच गई है।

पेट्रोलियम मंत्रालय के तहत पेट्रोलियम प्लानिंग व एनालिसिस सेल (पीपीएसी) की तरफ से जारी अधिसूचना में इस बारे में सूचना दी गई है। यह कीमत सिर्फ सरकार की तरफ से नामित कुछ गैस ब्लॉकों पर लागू होती है। हालांकि देश के कुल घरेलू उत्पादन में इनकी हिस्सेदारी 60 प्रतिशत है। देश में रोजाना 9.20 करोड़ घन मीटर गैस का उत्पादन होता है। इनकी आपूर्ति उर्वरक प्लांट, बिजली, सीएनजी, पीएनजी आदि को की जाती है।

जाहिर है कि उत्पादन कीमत बढ़ने से इन क्षेत्रों में भी गैस महंगी होगी। यानी उपभोक्ताओं को सीएनजी और घरेलू रसोई गैस महंगी पड़ सकती है। 2023-24 और 2024-25 के लिए उक्त कीमत 6.50 डालर थी। अप्रैल 2025 से इसे 6.75 डालर किया गया था। यह भी उल्लेखनीय है कि ईरान और इजरायल-अमेरिका युद्ध के कारण होर्मुज जलडमरूमध्य मार्ग बाधित होने से तेल-गैस के आयात पर बड़ा प्रतिकूल प्रभाव पड़ा है।

भारत के कच्चे तेल के भंडार केवल 20 से 40 दिनों के लिए ही पर्याप्त

नई दिल्ली, एएनआइ: पेट्रोलियम और प्राकृतिक गैस नियामक बोर्ड (पीएनजीआरबी) के सचिव अंजन कुमार मिश्रा ने बताया कि भारत के कच्चे तेल के भंडार केवल 20 से 40 दिनों के लिए पर्याप्त हैं और इसे कई महीनों तक बनाए नहीं रखा जा सकता। उन्होंने कहा, हमारे पास क्रूड आयल के लिए कुछ भंडार हैं, लेकिन ऐसा भंडार नहीं बना सकते जो छह महीने तक चले।

दिल्ली में आयोजित पीएचडीसीसीआइ के हाइड्रोकार्बन समिट 2026 के दौरान उन्होंने कहा कि पश्चिम एशिया क्षेत्र में संकट भारत को प्रभावित कर रहा है लेकिन सरकार ने उपाय किए हैं। उन्होंने कहा, "मैं यह नहीं कहूंगा कि यह भारत को प्रभावित नहीं कर रहा है, लेकिन निश्चित रूप से सरकार ने कई योजनाएं बनाई हैं और हम स्थिति की बहुत निकटता से निगरानी कर रहे हैं।"

मिश्रा ने यह भी स्पष्ट किया कि देश में जीवाश्म ईंधन की कोई कमी नहीं है, भले ही वैश्विक तनावों के कारण चिंताएं बढ़ी हों। भारत ने संकट के दौरान बांग्लादेश और श्रीलंका की भी मदद की है। उन्होंने कहा- "हमें इस संकट के समय अपने पड़ोसियों की मदद करनी चाहिए।"

उन्होंने कहा कि घरेलू कच्चे तेल के उत्पादन को बढ़ाना एक क्रमिक प्रक्रिया है और सरकार इस दिशा में प्रयासरत है। उन्होंने कहा कि भारत ने हाल के वर्षों में

▶ पीएनजीआरबी के सचिव मिश्रा बोले- पश्चिम एशिया में चल रही जंग भारत पर डाल रही असर

▶ सरकार बारिकी से स्थिति पर नजर रख रही, देश में जीवाश्म ईंधन की कोई कमी नहीं

पहला ईरानी तेल कार्गो गुजरात तट की ओर बढ़ रहा

पेट्र के अनुसार, 2019 के बाद से भारत ने अब पहली बार ईरान से कच्चे तेल का कार्गो मंगवाया है और यह गुजरात के बंदरगाह की ओर बढ़ रहा है। यह जानकारी जहाज ट्रैकिंग डाटा ने दी है। भारतीय रिफाइनरियां हाल ही में अमेरिका द्वारा लगाए गए प्रतिबंधों में अस्थायी छूट के बाद ईरानी तेल के कुछ कार्गो खरीदने की कोशिश कर रही हैं। जानकारी के अनुसार, जहाज पिंग शुन छह लाख बैरल कच्चे तेल के साथ गुजरात के वडिनार की ओर बढ़ रहा है। इसे ऊर्जा सुरक्षा के लिहाज से महत्वपूर्ण कदम माना जा रहा है।

अपने कच्चे तेल के स्रोतों को बढ़ाया है। आपूर्ति अब केवल पश्चिम एशिया से ही नहीं, बल्कि रूस और वेनेजुएला जैसे देशों से भी आ रही है और मोजाम्बिक और अंगोला में विकल्पों की तलाश की जा रही है।

ऊर्जा संकट और कुछ सुझाव

2026 का ऊर्जा संकट कई तरह की बाधाओं के एक साथ आने का नतीजा है। मौजूदा भू-राजनीतिक माहौल में, भारत की अर्थव्यवस्था के लिए 'कामचलाऊ' मॉडल को अपनाना संभव नहीं है। इस संदर्भ में कई ऐसे सुझाव हैं, जो वर्तमान संकट से निपटने में मददगार साबित हो सकते हैं।

भा

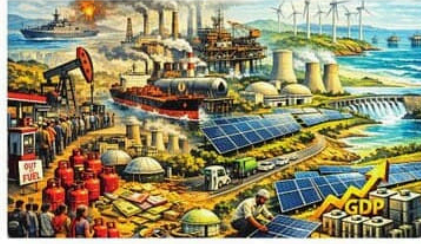
रत की सरकारें लंबे समय से नागरिकों को यह यकीन दिलाती रही हैं कि हालात बेहतर होने से पहले और बिगड़ते हैं, कि संकट एक 'फिल-गुड फैक्टर' है, क्योंकि यह सिर्फ सोचने-विचारने के बजाय काम करने के लिए प्रेरित करता है। आज देश इतिहास के सबसे बड़े ऊर्जा संकट का सामना कर रहा है। भारतीयों ने ऐसी स्थितियाँ पहले भी देखी हैं। हर संकट के साथ दिखावटी रस्म के तौर पर नेता जमा होते हैं, कमेटीयाँ बैठती हैं, और नौकरशाह समाधानों की एक लंबी-चौड़ी सूची पेश करते हैं। पर जो चीज ऊर्जा संकट के तौर पर शुरू होती है, वह महंगाई के जरिये धीरे-धीरे एक ऐसे आर्थिक दमघोंड़ हालात में बदल जाती है, जिसे सरकारें तब तक टालती हैं, जब तक कि ऐसा कर पाना उनके लिए नामुमकिन न हो जाए।

भारत इस ऊर्जा संकट में अचानक नहीं फँसा है, बल्कि वह इसमें खुद चलकर आया है-बेपरवाही से, बिना किसी जल्दबाजी के। ट्रंप के

युद्ध ने तो बस भारत के तमाम छूटे हुए अवसरों को खोलकर रख दिया है। उसके विरोधाभासों की खाई को और भी गहरा कर दिया है। अर्थव्यवस्था को जो कीमत चुकानी पड़ रही है, वह जान-बूझकर की गई अनदेखी का ही नतीजा है। अब, जब लोग एक बार फिर लंबी-लंबी कतारों में खड़े हैं, तो यहाँ कुछ सुझाव देना प्रासंगिक लगता है।

भारत अपनी अर्थव्यवस्था को चलाने के लिए आयात पर निर्भर रहा है। 1973 के तेल संकट ने

तेल बिल को लगभग चार गुना बढ़ा दिया था। 1979 के संकट के कारण भारत को अंतरराष्ट्रीय मुद्रा कोष से आर्थिक मदद लेनी पड़ी, और बॉम्बे हाई की खोज से भी इसमें कोई बदलाव नहीं आया। 2014 में, देश ने अपने कच्चे तेल व पेट्रोलियम उत्पादों की जरूरत का 70 फीसदी से अधिक आयात किया था। भाजपा ने 2014 के घोषणापत्र में 'आयात बिल कम करने' के लिए ऊर्जा की खोज बढ़ाने का वादा किया था। पर आज देश की तेल आयात पर निर्भरता 88.5 फीसदी से ज्यादा है। बेशक खपत बढ़ी है, पर अहम बात यह है कि घरेलू उत्पादन घट गया है।



भारत आयातित तेल के बैरल पर अपनी निर्भरता को घरेलू स्तर पर उत्पादित गीगावाट से बदलकर मजबूती बढ़ा सकता है और उसे ऐसा करना भी चाहिए। वर्ष 2005 में, किरीट पारिख की अध्यक्षता वाली एक विशेषज्ञ समिति ने एक रिपोर्ट तैयार की थी, जिसमें एकीकृत ऊर्जा नीति शामिल थी। आज, देश उन कई सिफारिशों को लागू करने में पीछे है। 63 गीगावाट परमाणु ऊर्जा के लक्ष्य के मुकाबले, आज स्थापित क्षमता 8.8 गीगावाट है, जिसमें पिछले 20 वर्षों में लगभग पांच गीगावाट की बढ़ोतरी हुई है। 2030 का 30 गीगावाट का लक्ष्य काफी महत्वाकांक्षी है। पर, महाराष्ट्र में जैतापुर प्रोजेक्ट पिछले 15 वर्षों से अटका हुआ है। जलविद्युत के क्षेत्र में, अनुशंसित 150 गीगावाट के मुकाबले स्थापित क्षमता 51.2 गीगावाट है। परमाणु और जलविद्युत, दोनों ही क्षेत्रों में विस्तार की राह में खराब नियामक सुधार, मंजूरी मिलने में रुकावटें और 'मेरे इलाके में नहीं' वाली राजनीतिक सोच जैसी बाधाएँ खड़ी हैं।

ऊर्जा संकट का सबसे स्पष्ट उदाहरण रसोई गैस के लिए लगने वाली लंबी कतारें और उनसे जुड़े घोटाले हैं। पाइपलाइन वाली प्राकृतिक गैस (पीएनजी) के विस्तार की काफी चर्चा है, लेकिन यह अभी सिर्फ 1.8 करोड़ घरों तक पहुँचा है, जबकि एलपीजी कनेक्शन 33.3 करोड़ हैं। सच तो यह है कि पीएनजी भी होर्मुज संकट से अछूती नहीं है। असल में भारत ने विकल्पों को तैयार नहीं किया। रसोई गैस के लिए बायोगैस संयंत्र के उपयोग का विकल्प है, खासकर उन राज्यों में जहाँ, दो-तीन फसलें होती हैं और परतली को जला दिया जाता है। इसके अलावा, सौर ऊर्जा का भी विकल्प है। इंडियन ऑयल ने 'सूर्य नूतन' नाम का एक सौर चूल्हा पेश किया है, जिसे 'पीएम सूर्य घर' रूफटॉप प्रोग्राम से जोड़ा जा सकता है और 'उज्ज्वला योजना' के तहत दिया जा सकता है।

एलपीजी से सौर ऊर्जा की ओर बदलाव से उपयोगकर्ताओं और सरकार, दोनों का बोझ कम होगा।

भारत के पास एक अनोखा कुदरती फायदा है कि यहाँ साल में 300 दिन धूप खिली रहती है। 2020 में, रिजर्व बैंक ने अपने खेतों पर सौर संयंत्र लगाने के इच्छुक किसानों, स्वयं-सहायता समूहों या किसान उत्पादक संगठनों के लिए ऋण देने की सुविधा शुरू की। सोलर फार्म पैदावार और आय बढ़ा सकते हैं। इसके बावजूद, यह योजना 10,000 मेगावाट के लक्ष्य के मुकाबले सिर्फ 839 मेगावाट की स्थापित क्षमता तक ही पहुँच पाई है। पीएम कुसुम के तहत मुश्किल से 21.77 लाख किसान हैं, जबकि पीएम किसान के तहत 9.35 करोड़ से ज्यादा किसान हैं। फिर दोनों योजनाओं को आपस में मिला क्यों नहीं दिया जाता?

बड़े लक्ष्य पाने के लिए लीक से हटकर सोचने की जरूरत होती है। भारत की स्थापित क्षमता 524 गीगावाट है, जो 2005 में चीन की 519 गीगावाट क्षमता से अधिक है, जब चीन दुनिया की चौथी सबसे बड़ी अर्थव्यवस्था थी। अकेले 2025 में, चीन ने 543 गीगावाट बिजली उत्पादन क्षमता जोड़ी, जो भारत की कुल उत्पादन क्षमता से भी अधिक है। 2005 के बाद से चीन ने अपनी कुल क्षमता को सात गुना बढ़ाकर 3,900 गीगावाट से भी ज्यादा कर लिया है। अब उसकी नवीकरणीय ऊर्जा क्षमता जीवाश्म ईंधन से होने वाली ऊर्जा क्षमता से भी ज्यादा हो गई। चीन ऊर्जा सुरक्षा को राष्ट्रीय सुरक्षा के रूप में देखता है। उसने अपने डॉलर अधिशेष का उपयोग संसाधन जुटाने के लिए किया, जिसमें एक रणनीतिक पेट्रोलियम भंडार भी शामिल है, जिसमें लगभग 1.5 अरब बैरल तेल रखा जा सकता है।

भारत के पास 11,098 किलोमीटर लंबा समुद्री तट भी है, जहाँ ज्वारीय, तरंग और महासागरीय ताप ऊर्जाओं का परीक्षण और संचय किया जा सकता है। जैसे-जैसे भारत नवीकरणीय ऊर्जा को बढ़ावा दे रहा है, उसे बैटरी स्टोरेज की सुविधा बढ़ाने पर भी जोर देना चाहिए और इसे हर राज्य तक पहुँचाना चाहिए। दरअसल, भारत की बैटरी स्टोरेज क्षमता बहुत ही कम है (सिर्फ 5.5 गीगावाट), जबकि मौजूदा जरूरत 61 गीगावाट है। भारत के पास 1.46 लाख किमी से ज्यादा लंबे राष्ट्रीय राजमार्ग भी हैं, जिनके डिवाइडर वाली जगहों का इस्तेमाल सौर ऊर्जा से ई-चार्जिंग करने और उन खाद्य प्रसंस्करण उद्योगों के लिए किया जा सकता है।

2026 का ऊर्जा संकट कई तरह की बाधाओं के एक साथ आने का नतीजा है। मौजूदा भू-राजनीतिक माहौल में, भारत की अर्थव्यवस्था के लिए 'कामचलाऊ' मॉडल को अपनाना संभव नहीं है।



शंकर अग्रवाल
विशेष एडिटर

पीएनजी नेटवर्क के विस्तार का काम तेज हुआ

नई दिल्ली, विशेष संवाददाता। मार्च में देश भर में पाइप के जरिए आपूर्ति की जाने वाली रसोई गैस (पीएनजी) के 3.1 लाख से अधिक कनेक्शन के लिए गैस की आपूर्ति शुरू की गई है। जबकि 2.7 लाख अन्य नए कनेक्शन जोड़े हैं।

सरकार के अनुसार देश की सभी रिफाइनरी पूरी क्षमता से काम कर रही हैं और कच्चे तेल का पर्याप्त स्टॉक मौजूद है। इसके साथ ही, पेट्रोल पंपों पर भी सप्लाई सामान्य है।

पश्चिम एशिया में जारी युद्ध के चलते होर्मुज जलडमरूमध्य के बंद होने के कारण रसोई गैस (एलपीजी)

शहरी क्षेत्रों में कनेक्शन बढ़ाने पर जोर



शहरी क्षेत्रों में पाइप गैस (पीएनजी) कनेक्शन तेजी से बढ़ाए जा रहे हैं। इसके लिए नेशनल पीएनजी ड्राइव 2.0 को 30 जून 2026 तक बढ़ा दिया गया है। शहरी गैस वितरण कंपनियों को निर्देश दिया गया है कि वह छात्रावासों और सामुदायिक रसोई जैसे स्थानों पर प्राथमिकता के आधार पर कनेक्शन दें। सरकार की तरफ से जारी बयान में कहा गया है कि एलपीजी का वितरण वर्तमान में स्थिर है। मार्च में प्रतिदिन औसतन 50 लाख से अधिक सिलेंडर की आपूर्ति की गई है। मजदूरों की जरूरत को देखते हुए पांच किलो वाले छोटे सिलेंडर की बिक्री भी बढ़ाई गई है।

की आपूर्ति में बाधा उत्पन्न हो रही है। इस बीच सरकार ने स्वच्छ ईंधन नेटवर्क के विस्तार को और तेज कर दिया है। भारत अपनी जरूरत की

अधिकांश एलपीजी का आयात करता है। युद्ध के कारण होर्मुज जलडमरूमध्य मार्ग के प्रभावित होने से एलपीजी की आपूर्ति प्रभावित है। हालांकि, देश की

अन्य क्षेत्रों की स्थिति

- देश के सभी बंदरगाह सामान्य रूप से काम कर रहे हैं। भारतीय जहाज और नाविक सुरक्षित हैं। अब तक 959 से ज्यादा भारतीय नाविकों को सुरक्षित वापस लाया जा चुका है।
- पश्चिम एशिया से अब तक करीब 5.72 लाख भारतीय वापस आ चुके हैं। विभिन्न देशों से विशेष उड़ानों के जरिए लोगों को लाया जा रहा है।

प्राकृतिक गैस की आधी जरूरत स्थानीय उत्पादन से पूरी होती है और शेष हिस्से के लिए सरकार ने विभिन्न विदेशी स्रोतों से इंतजाम किए हैं।

पश्चिम एशिया संकट के बीच PNG कनेक्शन पर केंद्र सरकार का जोर

■ NBT रिपोर्ट, नई दिल्ली

पश्चिम एशिया में युद्ध के चलते तेल-गैस की सप्लाई पर पड़ रहे असर के बीच सरकार ने PNG कनेक्शन देने के राष्ट्रीय अभियान की अवधि 30 जून तक बढ़ा दी है। सरकार ने मंगलवार को कहा कि मार्च में 3.1 लाख से ज्यादा कनेक्शंस को PNG सप्लाई चालू कर दी गई। 2.7 लाख से अधिक नए कनेक्शन दिए गए हैं और इनको भी गैस आपूर्ति चालू करने की प्रक्रिया चल रही है।

सरकार ने कहा कि देश में पेट्रोल-डीजल की तंगी नहीं है। LPG सिलिंडर डिलिवरी नॉर्मल है। 1 मार्च से रोजाना औसतन 50 लाख से ज्यादा घरेलू LPG सिलिंडरों की डिलिवरी की गई।

सरकार ने यह भी कहा कि होर्मुज स्ट्रेट बंद होने के मद्देनजर देश में पेट्रोलियम उत्पादों और LPG की आपूर्ति सुनिश्चित



LPG संकट के बीच IIT बॉम्बे ने एक ऐसा तरीका विकसित किया है, जिससे LPG के इस्तेमाल में 30% से 40% की कमी का दावा किया गया है।

करने के कदम उठाए गए हैं। तेल एवं गैस मंत्रालय ने कहा कि सभी रिफाइनरीज पूरी क्षमता से काम कर रही हैं और कच्चे तेल का पर्याप्त भंडार है। मंत्रालय ने कहा कि सिटी गैस डिस्ट्रिब्यूशन कंपनियों से कहा गया है कि वे घरेलू उपभोक्ताओं के साथ रेस्टोरेंट, होटलों और कैंटीन सहित कर्मागल उपभोक्ताओं को PNG

■ PNG कनेक्शन देने के राष्ट्रीय अभियान की अवधि 30 जून तक बढ़ाई गई।

■ मार्च में 3.1 लाख से अधिक कनेक्शंस को PNG सप्लाई शुरू हुई।

■ मार्च में 2.7 लाख नए पाइपड नैचुरल गैस कनेक्शन दिए गए।

कनेक्शन देने को भी प्राथमिकता दें, जिससे कर्मागल LPG की उपलब्धता से जुड़ी चिंता दूर हो सके। मंत्रालय ने कहा कि इसके साथ ही नैशनल PNG ड्राइव 2.0 की अवधि अब बढ़ाकर 30 जून तक कर दी गई है, जिससे PNG नेटवर्क को बढ़ावा मिल सके। यह अभियान इस साल पहली जनवरी को शुरू किया गया था और इसकी अवधि 31 मार्च को पूरी हो रही थी।

पीएनजी नेटवर्क का विस्तार तेज

नई दिल्ली, (पंजाब केसरी): भारत ने मार्च महीने में पाइप के जरिये आपूर्ति की जाने वाली रसोई गैस (पीएनजी) के 3.1 लाख से अधिक नए कनेक्शन के लिए गैस की आपूर्ति शुरू की है, जबकि जबकि 2.7 लाख अन्य नए कनेक्शन जोड़े हैं।

पश्चिम एशिया में जारी युद्ध के कारण 'होर्मुज जलडमरूमध्य' के बंद होने से रसोई गैस (एलपीजी) की आपूर्ति में आई बाधाओं के बीच सरकार ने स्वच्छ ईंधन नेटवर्क के विस्तार को और तेज कर दिया है। होर्मुज जलडमरूमध्य वह महत्वपूर्ण समुद्री मार्ग है जिसके माध्यम से भारत अपना अधिकांश एलपीजी का आयात करता है। युद्ध के कारण इस मार्ग

मार्च
में 2.7 लाख
नए कनेक्शन
जोड़े

के प्रभावित होने से एलपीजी की आपूर्ति में दिक्कत आई है। हालांकि, देश की प्राकृतिक गैस की आधी जरूरत स्थानीय उत्पादन से पूरी होती है और शेष हिस्से के लिए सरकार ने विभिन्न विदेशी स्रोतों से इंतजाम किए हैं।

पेट्रोलियम मंत्रालय ने बयान में बताया कि मार्च के दौरान घरों, व्यावसायिक प्रतिष्ठानों, छात्रावासों और कैम्पस सहित 3.1 लाख से अधिक कनेक्शन के लिए गैस की आपूर्ति शुरू की गई है। इसका आशय है उन पाइपलाइन में गैस की आपूर्ति शुरू कर दी गई जहां पहले से कनेक्शन मौजूद थे। इसके अलावा, इसी महीने 2.7 लाख नए आवेदन स्वीकार कर कनेक्शन दिए गए हैं।



राष्ट्रीय पीएनजी अभियान 2.0 की समय सीमा बढ़ाई गई : पेट्रोलियम मंत्रालय

एजेंसी ■ नई दिल्ली

पश्चिम एशिया में बढ़ते तनाव और हेर्मुज जलडमरूमध्य के बंद होने के मद्देनजर भारत सरकार ने देश में ऊर्जा आपूर्ति, समुद्री संचालन और विदेशों में रह रहे भारतीयों की सुरक्षा सुनिश्चित करने के लिए कई अहम कदम उठाए हैं। वहीं बदलते हालात के बीच सरकार ने राष्ट्रीय पीएनजी अभियान 2.0 की समय सीमा भी बढ़ा दी है। सरकार ने स्पष्ट किया है कि स्थिति पर लगातार नजर रखी जा रही है और आवश्यक वस्तुओं की आपूर्ति पूरी तरह नियंत्रण में है। सरकार के अनुसार, देश की सभी तेल रिफाइनरियां उच्च क्षमता पर काम कर रही हैं और पेट्रोल-डीजल का पर्याप्त भंडार उपलब्ध है। एलपीजी उत्पादन भी बढ़ाया गया है ताकि घरेलू जरूरतों को पूरा किया जा सके। कच्चे तेल की वैश्विक कीमतों में तेजी के बीच आम लोगों को राहत देने के लिए पेट्रोल और डीजल पर

10 रुपये प्रति लीटर उत्पाद शुल्क घटाया गया है, जबकि निर्यात को नियंत्रित करने के लिए डीजल (21.5 रुपये प्रति लीटर) और विमानन टरबाइन ईंधन (एटीएफ) (29.5 रुपये प्रति लीटर) पर लेवी लगाई गई है। देश भर में पेट्रोल पंप और ईंधन आउटलेट सामान्य रूप से संचालित हो रहे हैं। सरकार ने अफवाहों के कारण हो रही घबराहट में खरीदारी से बचने की अपील की है और कहा है कि कहीं भी ईंधन की कमी नहीं है। राज्य सरकारों को निर्देश दिए गए हैं कि वे नियमित प्रेस कॉन्फ्रेंस के जरिए सही जानकारी जनता तक पहुंचाएं और फजी खबरों पर रोक लगाएं।

घरेलू पीएनजी और सीएनजी आपूर्ति को प्राथमिकता दी गई है, जबकि औद्योगिक उपभोक्ताओं को सीमित आपूर्ति की जा रही है। डी-पीएनजी और सीएनजी-परिवहन को 100 प्रतिशत आपूर्ति के साथ उपभोक्ताओं को प्राथमिकता दी गई है।

Timely refill of LPG cylinder now essential consumer right

48-hour PNG disruption notice among eight rights notified by govt

ADITI TANDON
TRIBUNE NEWS SERVICE

NEW DELHI, MARCH 31

Timely refill of LPG cylinders and 48-hour prior notice in case of Piped Natural Gas supply disruptions will now be counted as essential rights of consumers. In the midst of crude oil and natural gas supply disruptions due to the West Asia war, the government has taken a major step to strengthen the rights of consumers of petrol, petroleum products and natural gas.

The Petroleum and Natural Gas Regulatory Board (PNGRB) has notified consumer protection regulations for the petroleum and natural gas sector to list eight essential rights and set uniform grievance redressal framework.

The new rules lay down a comprehensive framework to safeguard consumer interests across the petroleum, petroleum products and the natural gas sector.

The regulations, which have come into force, will apply to all entities engaged in refining, processing, storage, transportation, distribution and marketing of petroleum and natural gas and across all consumer categories.

The new regulations cover all consumers, including domestic PNG users, commercial and industrial consumers, CNG vehicle users, LPG consumers, as well as



People sit on empty LPG cylinders outside a gas agency in Mumbai on Tuesday. PTI

petrol and diesel customers at retail outlets.

Importantly, the rules clarify that these provisions do not dilute the rights available under the Consumer Protection Act, 2019, or any other applicable law.

For the first time, PNGRB has formally defined a set of eight core consumer rights, including the right to safety, right to information, right to choose, right to be heard, right to redressal, right to quality and assured supply, right to fair trade practices and right to consumer education.

The rules say that PNG consumers are entitled to timely new connections, defined service timelines, advance

notice (at least 48 hours) for any planned supply disruptions and transparent billing.

CNG consumers must receive accurate quantity and quality of gas and proper receipts besides access to basic amenities like drinking water, toilets and air facilities at stations.

LPG consumers can as a right claim assured timely refill delivery, correct subsidy transfer, safe installation and access to emergency helplines for leakage complaints.

Petrol and diesel consumers at retail outlets are guaranteed correct quantity, standard quality fuel, visible pricing and basic public facilities. The new order introduces a four-tier

grievance redressal system.

Disgruntled consumers must first approach the company's customer grievance cell, followed by escalation to a nodal officer and then an appellate authority.

If the complaint still remains unresolved, it can be taken to the PNGRB through its Integrated Grievance Redressal System (IGRS) or to an ombudsman.

All entities are required to establish a consumer complaint cell which will be mandated to receive complaints through multiple channels.

Every entity must acknowledge complaints within 24 hours and resolve them within prescribed turnaround times.

मार्च में 3.1 लाख पीएनजी कनेक्शनों का गैसीफाइड किया गया: पेट्रोलियम मंत्रालय

एजेंसी ■ नई दिल्ली

पेट्रोलियम और प्राकृतिक गैस मंत्रालय ने मंगलवार को घोषणा की कि ईरान युद्ध के कारण एलपीजी आयात में आई बाधाओं के बीच कुकिंग गैस की उपलब्धता बढ़ाने के प्रयास जारी हैं। इस क्रम में मार्च में घरेलू, कमर्शियल, छात्रावास, और कैम्पेन क्षेत्रों को कवर करते हुए 3.1 लाख से अधिक पीएनजी कनेक्शनों को गैसीफाइड किया गया है, जबकि 2.7 लाख नए कनेक्शन दिए गए हैं और उनको गैसीफाइड किया जा रहा है। 1 मार्च, 2026 से औसतन प्रतिदिन 50 लाख से अधिक घरेलू एलपीजी सिलेंडर वितरित किए जा रहे हैं, और एलपीजी वितरकों में किसी भी प्रकार की कमी की सूचना नहीं मिली है। इसके अलावा, मंत्रालय के एक बयान में कहा गया है कि 23



मार्च से प्रवासी श्रमिकों को 3.2 लाख से अधिक 5 किलो के सिलेंडर बेचे गए हैं, जिनमें से सोमवार को 63,000 से अधिक सिलेंडर बेचे गए। पाइप से आपूर्ति की जाने वाली प्राकृतिक गैस (पीएनजी) और वाहनों के लिए सीएनजी के मामले में, मांग को पूरा करने के लिए 100 प्रतिशत आपूर्ति वाले उपभोक्ताओं को प्राथमिकता दी गई है। ग्रिड से जुड़े औद्योगिक और कमर्शियल

उपभोक्ताओं को आपूर्ति उनकी औसत खपत के लगभग 80 प्रतिशत पर बनाए रखी जा रही है। बयान में कहा गया है कि होमूज जलडमरूमध्य के बंद होने के मद्देनजर, देश भर में पेट्रोलियम उत्पादों और एलपीजी की निर्यात उपलब्धता सुनिश्चित करने के लिए उपाय किए गए हैं। बयान में यह भी कहा गया है कि सभी रिफाइनरियां पर्याप्त कच्चे तेल के भंडार के साथ उच्च क्षमता पर काम कर रही हैं, और

पेट्रोल और डीजल का पर्याप्त स्टॉक बनाए रखा जा रहा है, जबकि स्थानीय खपत को पूरा करने के लिए रिफाइनरियों से घरेलू एलपीजी उत्पादन बढ़ाया गया है। देश भर में सभी पेट्रोल पंप सामान्य रूप से काम कर रहे हैं। हालांकि, कुछ क्षेत्रों में अफवाहों के कारण घबराहट में खरीदारी के मामले देखे गए हैं, जिसके परिणामस्वरूप खुदरा दुकानों पर असामान्य रूप से

अधिक विक्री और भीड़भाड़ हुई है। हालांकि, बयान में कहा गया है कि देश भर के सभी पेट्रोल पंपों पर पेट्रोल और डीजल का पर्याप्त स्टॉक उपलब्ध है। सरकार ने जनता को अफवाहों पर विश्वास न करने की सलाह दोहराई है और राज्य सरकारों से प्रेस ब्रीफिंग के माध्यम से सही जानकारी प्रसारित करने का अनुरोध किया है।

ऑनलाइन एलपीजी बुकिंग में लगभग 92 प्रतिशत की वृद्धि हुई है, जबकि डिजिटली आधारित ऑर्थोटिकेशन कोड (डीएसी) आधारित डिजिटली फरकी 2026 में 53 प्रतिशत से बढ़कर वर्तमान में 83 प्रतिशत हो गई है, जिससे हेराफेरी को रोकने में मदद मिली है।

पश्चिम एशिया संकट के बीच PNG कनेक्शन पर केंद्र सरकार का जोर

■ **NBT रिपोर्ट, नई दिल्ली:** पश्चिम एशिया में युद्ध के चलते तेल-गैस की सप्लाई पर पड़ रहे असर के बीच सरकार ने PNG कनेक्शन देने के राष्ट्रीय अभियान की अवधि 30 जून तक बढ़ा दी है। सरकार ने मंगलवार को कहा कि मार्च में 3.1 लाख से ज्यादा कनेक्शंस को PNG सप्लाई चालू कर दी गई। 2.7 लाख से अधिक नए कनेक्शन दिए गए हैं और इनको भी गैस आपूर्ति चालू करने की प्रक्रिया चल रही है।

सरकार ने कहा कि देश में पेट्रोल-डीजल की तंगी नहीं है। LPG सिलिंडर डिलिवरी नॉर्मल है। 1 मार्च से रोजाना



LPG संकट के बीच IIT बॉम्बे ने एक ऐसा तरीका विकसित किया है, जिससे LPG के इस्तेमाल में 30% से 40% की कमी का दावा किया गया है।

औसतन 50 लाख से ज्यादा घरेलू LPG सिलिंडरों की डिलिवरी की गई।

■ **PNG कनेक्शन देने के राष्ट्रीय अभियान की अवधि 30 जून तक बढ़ाई गई।**

■ **मार्च में 3.1 लाख से अधिक कनेक्शंस को सप्लाई शुरू हुई।**

सरकार ने यह भी कहा कि होर्मुज स्ट्रेट बंद होने के मद्देनजर देश में पेट्रोलियम उत्पादों और LPG की आपूर्ति सुनिश्चित करने के कदम उठाए गए हैं। तेल एवं गैस मंत्रालय ने कहा कि सभी रिफाइनरीज पूरी क्षमता से काम कर रही हैं और कच्चे तेल का पर्याप्त भंडार है।