Asian Age, Delhi, 12/03/2026

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Reliance to invest in US oil refinery, says Trump

President calls it historic $300-bn deal; unit to be located in Brownsville

ENERGY SECURITY

WILL BE FIRST OIL REFINERY THAT RELIANCE WILL BUILD IN THE U.S.

- Reflects Washington's recalibrated stance as Middle Eastern supplies tighten amid the Iran war.

- Will be designed to run entirely on US shale oil, according to America First Refining, the firm piloting the project.

- Potential deal underscores how Reliance is capitalising on shifting energy alliances as geopolitical conflicts chokes energy supplies.
- AFR without naming the company said it has received a 9-figure investment from a global supermajor at a 10-figure valuation.
- Groundbreaking for the project scheduled in the second quarter of 2026.

The first new US oil refinery in 50 years. A historic $300-billion deal

— US PRESIDENT TRUMP

Mumbai, March 11: Mukesh Ambani's Reliance Industries will partner in building the first new oil refinery in the US in 50 years, US President Donald Trump said, calling it the "biggest in US history".

The new refinery will be located in Brownsville, Texas, and will be designed to run entirely on US shale oil, according to America First Refining (AFR), the firm piloting the project.

Reliance has signed a 20-year agreement to purchase fuels produced at the refinery, with groundbreaking for the project scheduled in the second quarter of 2026.

While Trump in a social media post on Truth Social named Reliance as partner in the project that he said was "A historic $300 billion dollar deal", AFR without naming the company said it has "received a 9-figure investment from a global supermajor at a 10-figure valuation".

Reliance did not immediately offer any comments.

Once completed, it would be the first new major refining project in the US since Marathon's Garyville facility came online in 1977.

Neither Trump nor AFR gave financial details of the project or completion timelines.

The project may cost up to $4-5 billion, according to industry experts.

This will be the first oil refinery that Reliance will build in the US. It operates the world's biggest refining complex at Jamnagar in Gujarat with a capacity to process 1.24 million barrels of crude oil. It can process the dirtiest grades of crude oil. Reliance has no overseas refining assets.

A foothold in South Texas would help embed the company in the US energy landscape, as commercial interests align with diplomatic priorities.

The potential deal underscores how Reliance is capitalising on shifting energy alliances as geopolitical conflicts chokes energy supplies.

This also reflects Washington's recalibrated stance as supplies tighten amid the Iran war.

Under the newly signed agreement, 1.2 billion barrels of US light shale oil, valued at $125 billion, will be purchased and processed. Also, AFR will produce 50 billion gallons of refined products worth $175 billion.

The US Energy department didn't immediately respond to a request for more details.

"As the US expands its downstream chemical infra, Reliance emerged as a strategic partner," said Deven R Choksey, founder of DRChoksey FinServ, a wealth management firm.

"Reliance provides the technical expertise and investment needed to bolster US downstream projects."

The talks with America First follow a bilateral trade deal that reduced tariffs on Indian exports in exchange for commitments to diversify away from Russian energy. The recent developments follow intensive engagement by Reliance leadership.

—PTI/Bloomberg

RIL to make major investment in US refinery: Trump

Nehal Chaliawala
nehal.chaliawala@livemint.com
MUMBAI

In the wee hours of Wednesday, India time, President Donald Trump announced that Reliance Industries Ltd will partner America First Refining to set up the first new refinery in the US in nearly 50 years, in a deal valued at $300 billion.

Donald Trump thanked Reliance for the investment. AP

Reliance Industries, however, had not confirmed the development as of press time. Shares initially surged but reversed to close 1.27% lower at ₹1,391.1 on the BSE, while the Sensex ended 1.72% down.

"Today I am proud to announce that America First Refining is opening the first new US oil refinery in 50 years in Brownsville, Texas," Trump wrote on Truth Social. "Thank you to our partners in India, and their largest privately held energy company, Reliance, for this tremendous investment."

Separately, America First Refining said that it received a "9-figure investment from a global supermajor at a 10-figure valuation," in February without naming the investor. (A 10-figure valuation ranges between $1-9.9 billion; a 9-figure investment between $100-999 million.) The company also said it had signed a binding 20-year off-take term sheet with the unnamed investor.

Reliance will partner America First Refining to set up the new refinery in the US in a deal valued at $300 billion

Reliance did not respond to *Mint's* requests for comment. The lack of confirmation from Reliance and the anonymity of America First's investor leaves unclear the Indian company's role in the project.

Trump's announcement comes as Reliance pursues a $10-billion investment to diversify from petroleum into renewable energy near its Jamnagar refinery, including solar panels, green hydrogen, and other clean technologies. Last month, chairman Mukesh Ambani also announced plans to invest ₹10 trillion over seven years in AI infrastructure, including data centres.

India's most valuable company with a market capitalization of ₹18.8 trillion, RIL runs the world's largest refinery complex in Jamnagar, processing 1.2 million barrels per day.

America First Refining added that construction would begin before June. The refinery is expected to process 60 million barrels of US light shale oil annually, totalling 1.2 billion barrels worth $125 billion over two decades. It would produce 50 billion gallons of refined products valued at $175 billion.

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

Mint, Delhi, 12/03/2026
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The world needs these two Middle East pipelines now more than ever

Joe Wallace & Rebecca Feng

THE WALL STREET JOURNAL.

Two pipelines built just for the occasion—one in Saudi Arabia and one in the United Arab Emirates—bypass the Strait of Hormuz. They are the only ways to get a significant amount of oil out of the Persian Gulf into world markets.

The pipes can't replace the flows carried by tanker ships, but their use is almost all that is preventing an even worse crisis from unfolding. Saudi Arabia in particular is pumping as much crude as possible through its pipeline to its Red Sea port of Yanbu, built in the early 1980s when the Iran-Iraq War threatened shipping in the Persian Gulf.

"While we have faced disruptions in the past, this one by far is the biggest crisis the region's oil-and-gas industry has faced," said Amin Nasser, Saudi Aramco's chief executive, on Tuesday.

The shipping blockage has made Saudi Arabia's East-West pipeline one of the most critical pieces of infrastructure in the world economy. The state oil producer expects to send a maximum of 7 million barrels of oil through the 746-mile-long pipeline within a few days, Nasser said.

About 2 million barrels of oil are dedicated to Saudi refiners, leaving 5 million barrels that could reach global markets each day. That is equal to most of Saudi Arabia's crude shipments through the strait in the run-up to the war, according to the International Energy Agency.

It is a big test of the infrastructure. The pipe has never run at full capacity for an extended period, the IEA said. And it doesn't fix the whole problem: Aramco sends 800,000 barrels daily of petroleum products through the strait, which can't be rerouted. Plus, there is the oil stranded in Kuwait, Iraq and Bahrain.

To boot, Iran has attacked energy infrastructure across the Gulf in an attempt to drive up prices for American voters. Analysts say there isn't much to stop Tehran from targeting the Saudi and Emirati pipelines.

As long as oil is flowing through them, at least some crude can reach buyers while more than 1,000 ships are stuck in the Persian Gulf. The smaller Emirati pipeline transports crude from Abu Dhabi to the port of Fujairah on the Gulf of Oman.

"If you suddenly see two very large crude carriers coming out of Yanbu and one out of Fujairah, there is a psychological effect that at least some oil is coming out," said Adi Imsirovic, a former trader and lecturer at the University of Oxford. "What really worries me is that it's not particularly difficult to target those pipelines."

Crude prices fell Tuesday, extending a retreat sparked by President Trump's comment that the war would be over "very soon." Brent, the global benchmark, is still 27% higher than on the eve of the war.

One sign buyers are desperate to get their hands on crude that can bypass Hormuz is the fact that prices on either side of the strait have gone haywire. Crude loaded from Oman trades at a premium to a flavor known as Dubai, which can't be diverted from the port of Fateh on the wrong side of the passage.

A tanker belonging to daredevil Greek shipowner George Prokopiou is among the few Western ships to have sailed out through the passage since the war began, according to data firm Kpler. It was carrying Saudi crude and sailed through Hormuz with its signal off.

The pipes can't replace tanker ships, but their use is almost all that is preventing an even worse crisis from unfolding. REUTERS

Oil flows through the waterway ticked higher Monday, Goldman Sachs analysts said in a note, counting the number of vessels at 20% of prewar daily rates. The bank cautioned that the data can be noisy and that tanker traffic has become hard to track as vessels turn off their transponders to avoid detection.

Other European tanker executives with ships in the region said they still didn't feel confident sending them through the strait.

> To boot, Iran has attacked energy infrastructure across the Gulf in an attempt to drive up prices for American voters

Snaking through dunes, mountains and lava fields, the pipeline carries oil from huge fields in eastern Saudi Arabia to the country's Red Sea Coast. It is roughly the same length as the Trans-Alaska Pipeline.

Around 7,000 workers toiled on the four-year project, overseen by a division of Mobil Oil, an in-house Aramco newsletter reported in 1983, two years after the first shipment. For a parallel pipe dedicated to natural-gas byproducts, workers blasted a trench across the Arabian Peninsula with 2,000 tons of explosives.

The artery was conceived as a way to dodge the Persian Gulf and bring Saudi exports closer to Western markets. These days, most Saudi oil exports head to Asia.

Even more oil might have been able to head out via the Red Sea had another pipeline not fallen hostage to regional hostilities. At the start of 1990, Iraq and Saudi Arabia opened a massive pipeline that was supposed to take Baghdad's crude all the way to Yanbu. Seven months later, Saddam Hussein invaded Kuwait and the pipeline never took off.

Daily exports out of Yanbu have risen by 2 million barrels a day over the past week, said Vikas Dwivedi, global energy strategist at Macquarie. He estimates that the pipe was running at 50% to 60% capacity as of Monday.

A smaller, newer Emirati pipeline, partially built by a subsidiary of state-owned China National Petroleum Corp., runs from Habshan in Abu Dhabi to Fujairah on the Gulf of Oman. It carries up to 1.8 million barrels a day and was already pushing about 1.1 million barrels through before the war, according to the IEA.

Crude loadings at both Yanbu and Fujairah have jumped. Petrobras, the Brazilian state-backed oil company, said Saudi Arabia has satisfied its commitment by sending oil through the pipeline. The only problem for Petrobras now, said its chief executive, is the increase in shipping costs.

A back-of-the-envelope calculation suggests that even with the pipeline flows, there are still around 10 million barrels that will be stuck in the Persian Gulf, according to analytics firm Sparta Commodities. "We've basically solved half of the problem," said Neil Crosby at Sparta.

Though safer than heading into the Persian Gulf, loading oil in the Red Sea and at Fujairah isn't risk free. The Emirati port was damaged by an attempted drone attack last week, which prompted some fuel suppliers there to back out of contracts.

Iran-aligned Houthi rebels in Yemen launched dozens of attacks on commercial ships in 2024. Though they haven't restarted the campaign during the current war, maritime security analysts at U.K.-based Ambrey are advising ships tied to the U.S. and Israel to avoid the Red Sea.

Iran itself built a pipeline to get around the Persian Gulf to the port of Jask on the Gulf of Oman. A supertanker capable of carrying 2 million barrels of crude loaded at the port over the weekend, according to Kpler. It was only the third cargo to set sail from Jask since 2021.

feedback@livemint.com

Mint, Delhi, 12/03/2026

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IEA proposes largest ever oil release from strategic reserves

Matthew Dalton,
Bojan Pancevski &
Laurence Norman

PARIS

The International Energy Agency has proposed the largest release of oil reserves in its history to bring down crude prices that have soared during the U.S.-Israel war with Iran , officials familiar with the matter said.

The release of 400 million barrels of oil would more than double the agency's biggest prior release, when IEA member countries in 2022 put 182 million barrels on the market after Russia launched its full-scale invasion of Ukraine, the officials said. The proposal was circulated at an emergency meeting of energy officials from the IEA's 32 member countries on Tuesday.

Countries are expected to decide on the proposal Wednesday. It would be adopted if none objects, but even one country's protests could delay the plan, officials said.

French President Emmanuel Macron will host a video conference call at 10 a.m. ET with leaders of the Group of Seven advanced economies to discuss ways to mitigate the energy situation, France's Elysee Palace said.

The IEA proposal is intended to counter the massive disruption caused by the near-total closure of the Strait of Hormuz , the narrow waterway that connects the Persian Gulf to global markets. Roughly one-fifth of the world's oil supply moves through the strait every day and the threat of attacks on tankers by Iran have brought shipments to a near standstill.

Iranian attacks on oil tankers traveling through the strait are the kind of scenario that led Western nations and their allies to create the IEA in 1974 in the wake of the Arab oil embargo. The agency, a club of Western nations and their allies, sets guidelines for how much crude member countries must keep in their reserves and coordinates releases to protect economies from oil market turmoil.

Since Feb. 28 when the U.S. and Israel first began their strikes on Iran, the price of oil has soared as much as 40%, breaching $100 before falling this week as traders closely track statements from President Trump on how long the war will last. Oil ended Tuesday under $84, but the price of fuels such as diesel has continued to skyrocket .

THE WALL STREET JOURNAL.

Economists have warned that a sustained run-up in oil prices risks creating inflation and a stock market correction , in addition to pain at the pump for drivers.

IEA members hold 1.2 billion barrels in public stocks, plus another 600 million in mandatory commercial inventories, IEA Executive Director Fatih Birol said Monday. By rough calculation, that is around 124 days worth of lost supply from the Gulf.

Previous releases from strategic reserves have had mixed results.

IEA members did two releases in quick succession after Russia invaded Ukraine in early 2022. The move at first caused oil prices to rise 20% as traders saw the release as a sign the oil crisis was more serious than they had anticipated. Analysts say the releases eventually helped bring prices down.

A particularly successful release took place in 1991 when then-President George H.W. Bush prepared for Operation Desert Storm by ordering what was then the first ever drawdown of the Strategic Petroleum Reserve on the same night a U.S.-led coalition attacked Iraq. IEA members joined in releasing more oil from stockpiles in a plan they had put in place ahead of the invasion.

Prices fell more than 20% on the first day of the U.S.-led assault. By the time coalition forces entered Iraq and Kuwait in February, oil from the SPR was on the market.

The release of 400 million barrels of oil would more than double the agency's biggest prior release. BLOOMBERG

feedback@livemint.com

Urea cos shut plants as war hits LNG flows

Some urea companies in India have shut down plants or moved up annual maintenance after Qatari supplies of liquefied natural gas (LNG), a key feedstock, were suspended due to the Iran war.

Manufacturers, including top producer Indian Farmers Fertiliser Cooperative Ltd, have either halted some of their facilities or started routine upkeep, according to people familiar with the matter.

Restarting a paused plant could take as long as a month, provided LNG supplies resume, they added, asking not to be named because the matter is private.

LNG is the primary feedstock for urea production, serving as an energy source and a key input in making the world's most widely used fertilizer. Gas supplies to India's fertilizer industry are currently about 70% of their requirement, the people added. **BLOOMBERG**

Business Line, Delhi, 12/03/2026
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India's energy supplies are secure, says govt

Rishi Ranjan Kala
New Delhi

The government asserted that emergency measures, including directing refineries and petrochemical complexes to maximise LPG production, and invocation of the Essential Commodities Act and Petroleum Products (Maintenance of Production, Storage and Supply) Order from March 5, had helped boost India's LPG production by 25 per cent.

The government also underlined that 70 per cent of India's crude imports are now being routed outside the Strait of Hormuz and that energy supplies are secure.

HOUSEHOLD USE

Sujata Sharma, Joint Secretary, Ministry of Petroleum and Natural Gas, said the entire domestic LPG production is being directed towards household consumers.

She said that the government, on March 8, directed all domestic or SEZ oil-refining companies to ensure that the entire production of C3 and C4 streams, including propane, butane and propylene, is utilised for LPG production. "Due to this, domestic LPG production increased 25 per cent," she added, without offering more details on the volumes produced.

On Monday, government sources said LPG production was up 10 per cent.

LPG OUTPUT

India's average daily LPG production stood around 34,613 tonnes in October 2025, declining to 34,533 tonnes in November.

However, it rose to 35,968 tonnes in December 2025 and to 37,355 tonnes in January this year. February 2026 numbers are yet to be published. If we take the latest available (January 2026) average daily production as the base, India's LPG average per day output has risen to roughly 46,694 tonnes.

On LNG, Sharma said India's cumulative natural gas consumption is around 189 million standard cubic meters per day (mscmd), of which around 97.5 mscmd is domestically produced and the remaining 91.5 mscmd is imported. Of this, 47.4 mscmd of supply is affected due to *force majeure*.

The situation is challenging at the global level, but India's energy supplies are in control, said Sharma.

Also read p2

Business Line, Delhi, 12/03/2026
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Trump announces first US refinery in 50 years with Reliance on board

ENERGETIC. America First Refining facility to process 60 m barrels/year of light shale oil

Richa Mishra
Janaki Krishnan
Hyderabad/Mumbai

US President Donald Trump said America First Refining was opening the first US oil refinery in 50 years in Texas, and indicated that India's Reliance Industries would also be investing in it.

In a post on social media platform Truth Social, Trump said: "Today I am proud to announce that America First Refining is opening the first new US oil refinery in 50 years in Brownsville Texas. This is a historic $300 billion deal — the biggest in US history..."

THANKS RELIANCE

He went on to thank "our partners in India, and their largest privately-held energy company, Reliance, for this tremendous investment".

Confirming the construction of the oil refinery, America First Refining, in a statement, said that in February it had received "a 9-figure investment from a global supermajor at a 10-figure valuation". It added that it had signed a "binding 20-year offtake term sheet with the same global supermajor that secures commitments to purchase, process and distribute American-produced energy exclusively sourced from American shale oil."

STRATEGIC DEALS. Reliance Industries is not the only partner in the project, and there are other companies investing in it

PRODUCTION CAPACITY

The statement, however, did not disclose any names, but said the facility will have capacity to process 60 million barrels per year of US light shale oil. Its strategic location at a deepwater port would enable easy distribution to the domestic and international markets. America First Refining said it expects to break ground for the refinery in the second quarter of 2026.

Sources *businessline* spoke to indicated that RIL's involvement in the project was still in the works and that the details were in the process of being worked out. The final agreement is yet to be signed, said multiple sources with knowledge of the development. RIL is not the only partner in the project, and there are other companies investing in it, the sources added. An e-mail sent to RIL seeking confirmation of its investment and details of the project did not receive a response. The company has not made an official statement.

INDIA-US TRADE

RIL's investment in the US energy sector is seen as a significant component in the India-US trade negotiations. US has a shortage of refining capacity and RIL, as the world's largest refiner, can play a critical role here, analysts say.

The company also stands to benefit from the deal. The US is a market for petchem and petroleum products, and RIL has a long-term contract to import ethane from the US. In his post, Trump called the investment the largest in US history and a "massive win for American workers, energy and the great people of South Texas".

The refinery is expected to fuel US markets, boost energy production and "deliver billions of dollars in economic impact", according to Trump.

Business Standard, Delhi, 12/03/2026
Page No: 1, Size: 39.05cm × 43.44cm

Gas supply jitters begin rattling industry pockets

ISHITA AYAN DUTT, ANJALI SINGH, SHIVANI SHINDE, SHARLEEN D'SOUZA & GULVEEN AULAKH
Kolkata/Mumbai/New Delhi, 11 March

People queue up to get LPG cylinders in Guwahati on Wednesday PHOTO: PTI

Concerns over disruptions in natural gas and LPG supplies are beginning to affect operations in some industries, though others say the impact so far remains limited.

At least two major steel producers said the shortage has started to affect certain downstream processes, although the disruption is not yet severe. One industry executive said natural gas or propane is commonly used in furnaces, meaning production cannot remain entirely insulated from supply constraints.

"Natural gas or propane is used in the furnace, so there is an impact. As of now, it's not major," said the executive.

Smaller steel mills, however, warn the situation could worsen if the shortage persists. Vivek Adukia, chairman of the West Bengal-based Steel Re-Rolling Mills Association of India, said that while LPG may not be a primary raw material, it remains essential for certain operational processes. "Induction furnace operators who manufacture billets require LPG for lancing. Without it, the production cycle cannot be completed," said Adukia.

According to him, most mills currently have enough inventory to operate for the next few days. "If the situation continues, some mills may have to shut down," he added.

Packaged food companies are also beginning to feel the strain.

Industry executives earlier this week told *Business Standard* that some manufacturers have had to cut production at plants in certain states as gas supplies remain constrained.

By contrast, the automotive sector has so far remained largely unaffected.

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Business Standard, Delhi, 12/03/2026

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Gas supply jitters begin rattling industry pockets

Industry insiders said vehicle manufacturers continue to operate normally while closely monitoring the evolving situation. Tata Motors, one of India's largest passenger vehicle makers, has not experienced any disruption in production so far, sources said. However, the company is closely tracking developments across both its own facilities and its supplier ecosystem. Sources added that mitigation measures, such as reprioritising the use of available resources across operations, could be activated if required.

"So far, there is no disruption in the production of vehicles. The key raw materials required for manufacturing such as metals and polymers are not affected. Polymers are largely derived from oil and refinery operations continue, so the basic supply chain for vehicle manufacturing remains intact," said Anurag Singh, advisor at Primus Partners.

However, he added the impact could be felt more by consumers than manufacturers. If compressed natural gas (CNG) availability tightens, vehicle owners, especially taxi operators, may have to temporarily switch to petrol, increasing their running costs.

Rohan Kanwar, vice president and sector head for corporate ratings at Icra, echoed a similar view, noting that automotive original equipment manufacturers (OEMs) are not expecting any immediate disruption to vehicle production. However, he said companies remain cautious about potential indirect effects. Higher fuel prices could affect freight availability and logistics costs, while petrochemical-linked input costs may also rise. Some of these pressures could be partially offset through cost optimisation measures, he added.

Companies manufacturing tower masts or telecom towers that primarily run on LPG have switched to low-flame operations for galvanisation after LPG supplies stopped, said Manoj Kumar Singh, director general of the Digital Infrastructure Providers Association (DIPA), the industry body representing telecom infrastructure providers. Although steps have been taken to prevent damage to plants and maintain zinc in molten form, the industry body cautioned that tower manufacturing units may have to shut down operations entirely if the LPG disruption persists. This, in turn, would disrupt the supply chain and ongoing as well as planned tower rollout activities by telcos.

The LPG shortage could also affect catering services that support large corporate campuses, particularly those serving IT companies and multinational firms.

HungerBox, a Bengaluru-based food technology platform that manages institutional cafeterias, said operations are currently running normally. The company serves 243 clients, manages 891 cafeterias and works with 886 food partners across 38 cities. Sandipan Mitra, co-founder and chief executive officer of HungerBox, said the LPG shortage has not yet affected its services.

"As of now the LPG shortage has not impacted our services, and operations across corporate and institutional campuses continue to run normally," Mitra said. "We are closely monitoring the situation, as most kitchens in India's institutional food service sector still rely on commercial LPG."

He added that the company has put multiple contingency measures in place in case the situation worsens. These include maintaining priority cylinder inventory buffers, exploring alternative fuel sources, rationalising menus to reduce cooking-intensive items, and adjusting service windows if required. For critical facilities such as hospitals, HungerBox is maintaining dedicated backup fuel arrangements to ensure uninterrupted services.

Three large corporate houses based in Delhi and Mumbai said they have not yet experienced any impact at their headquarters. One company executive said hybrid work arrangements introduced during the pandemic, such as two days of work-from-home each week, remain in place, but no additional changes have been made in response to the LPG supply concerns.

Amid concerns over a possible LPG shortage, the Indian Railway Catering and Tourism Corporation has directed catering units at railway stations in its western zone to shift to microwave and induction plates and maintain stocks of ready-to-eat food items for passengers. In a March 10 communication, IRCTC asked operators of food plazas, refreshment rooms and 'Jan Ahaars' to use alternative arrangements to maintain seamless catering services for passengers.

Business Line, Delhi, 12/03/2026

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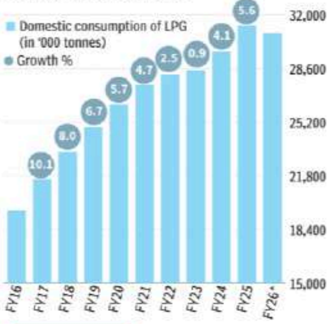
VISUALLY.

Compiled by Sourashis Banerjee, Sindhu Hariharan | Graphic Visveswaran V

Growing vulnerabilities

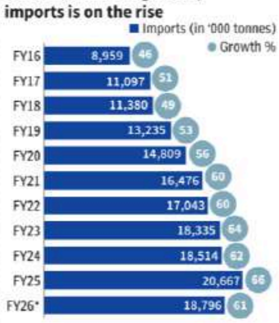
With gradual increase in the domestic consumption of liquefied petroleum gas (LPG), import dependence is also growing. While about 46 per cent of domestic demand was met by imports in FY16, this has gone up to 61 per cent in FY26. This import dependence raises strategic vulnerabilities in India's energy security, especially in cases like the present West Asia conflict, as India sources 80-90 per cent of its LPG imports from that region

Domestic consumption of LPG increasing at a slow pace



*FY26 data is till Feb 28 (Provisional)

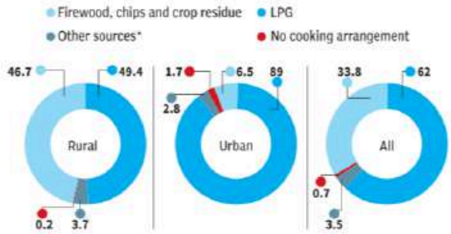
But share of domestic LPG consumption being met by imports is on the rise



*FY26 data is till Jan 31 (Provisional)

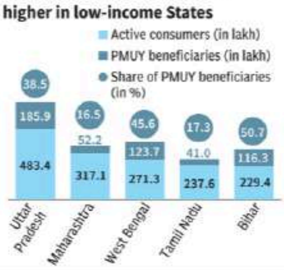
Only half of rural households uses LPG for cooking

Percentage of households by primary source of energy used for cooking (2020-21)



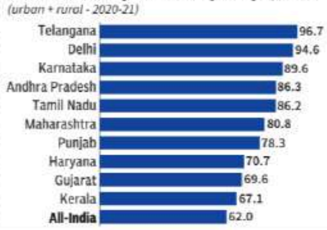
*Other sources include: other natural gas, dung cake, kerosene, biogas, electricity etc

Share of PMUY beneficiaries is higher in low-income States



However, southern States have higher adoption of LPG for cooking

% of households using LPG for cooking among top States (urban + rural - 2020-21)



Source: PPAC, Multiple Indicator Survey in India - NSS 78th round

High oil prices to intensify financial pressure on oil companies: Moody's

The heightened risk of supply disruption from West Asia, a key crude source for Asia, has driven a sharp rise in global oil prices which will likely intensify financial pressure on national oil companies in the coming months in the region, according to Moody's Ratings.

Fuel-pricing regimes and speed of policy response will drive effects of oil-price spike, it said in a report, adding that India's state-owned oil-marketing companies (OMCs) are facing heightened margin and cash-flow volatility.

Domestic retail prices of fuels have remained largely steady since April 2022, despite swings in global oil and gas prices and the country's high dependence on imports. The three OMCs control around 90 percent of retail fuel outlets in the country.

"The companies will bear rising input costs from higher energy prices without corresponding increases in selling prices because the government's influence over retail pricing prevents timely cost pass-throughs," Moody's said in the report.

SUDHEER PAL SINGH

Business Line, Delhi, 12/03/2026
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Energy policy success

Deft diplomacy, strategic reserves can avert crisis

Tuhin A Sinha
Sumit Kaushik

The temporary disruption in LPG supplies in parts of India is a reminder of how deeply interconnected the global energy system has become. The closure of the Strait of Hormuz amid escalating tensions in West Asia has triggered shocks across global energy logistics.

The government responded quickly by invoking the Essential Services Maintenance Act to ensure supply chains continue functioning smoothly. Officials have clarified that the disruption is logistical rather than structural and is expected to stabilise soon as alternative supply routes and inventories are activated.

Moments like these test not only the resilience of energy systems but also the maturity of political discourse. The Strait of Hormuz is among the world's most critical energy choke-points. When it is disrupted, the global supply chain inevitably feels the impact. In such extraordinary geopolitical circumstances, responsible politics requires calm assessment rather than alarmism.

A CRITICAL PILLAR

Energy security is a critical pillar of national security for a country that imports nearly 85 per cent of its crude oil requirements. Global oil market disruptions can directly affect inflation, trade balances and economic stability. Recognising this vulnerability, the government has spent the past decade strengthening India's energy resilience through diversification, infrastructure investment and diplomatic engagement.

One key factor behind this resilience is diversification of suppliers. Over the last decade, India has expanded the number of countries from which it imports crude oil. By 2025, the number of supplier nations had increased from 27 to 40. This ensures that no single geopolitical crisis can cripple India's supply chain.

India also maintains significant energy buffers. The country currently holds between six and eight weeks of crude and fuel inventory.

Commercial refiners maintain roughly 25 days of stock while strategic petroleum reserves provide additional coverage. Combined, these reserves allow India to withstand supply disruptions for nearly 70 days.

Strategic petroleum reserves have been particularly important. Underground storage facilities at

ENERGY. A critical pillar of national security GETTY IMAGES

Visakhapatnam, Mangaluru and Padur provide about 5.3 million tonnes of crude storage capacity. In addition, India maintains substantial onshore crude storage.

Another pillar of stability has been India's pragmatic energy sourcing strategy. Following changes in global markets, India significantly increased imports of discounted Russian crude. By 2025, Russia accounted for roughly 35 per cent of India's oil imports, helping stabilise supplies and shield domestic markets from global price volatility.

During the current crisis, the government has also reviewed contingency options including supply diversification and maritime security.

State run refiners such as Indian Oil, Bharat Petroleum and Hindustan Petroleum have explored alternative supplies from the US, West Africa and Latin America. While these shipments involve longer transit times than Gulf routes, India's diversified supplier network ensures viable alternatives remain available.

Energy security depends not only on infrastructure but also on diplomacy.

India has remained engaged with key regional actors including Israel, Iran, Saudi Arabia and the United Arab Emirates. Such diplomatic balance is crucial in a region that remains central to global energy markets. It is also important because nearly nine million Indians live in West Asia.

The country is projected to be one of the largest drivers of global oil demand growth in the coming years. To support this growth, India has expanded refining capacity and upgraded energy infrastructure.

Energy security is constructed gradually through sustained policy planning, infrastructure investment and diplomatic engagement.

Sinha is National Spokesperson, BJP; Kaushik is a social impact and public policy consultant

Oppn CMs urge PM to ensure cooking gas supply isn't disrupted

ARCHIS MOHAN
New Delhi, 11 March

Amid the Opposition's criticism of the government's handling of the fallout from the conflict in West Asia, and its demands for a discussion in Parliament on the issue, Prime Minister Narendra Modi on Wednesday accused the Congress of indulging in cheap politics over the crisis.

The Congress on Wednesday repeated its demand for a discussion in Parliament on the issue, while Chief Ministers, including M K Stalin of Tamil Nadu, Pinarayi Vijayan of Kerala and Mamata Banerjee of West Bengal urged the PM and the Union government to take steps to ensure that the supply of cooking gas is not disrupted.

The Centre on Wednesday said that the Union Home Secretary held a meeting with the chief secretaries and director generals of police of states and Union Territories where he asked them to take proactive action to prevent hoarding and black-marketing of LPG cylinders. The states and UTs were also asked to ensure a credible flow of information to people by appointing spokespersons and also use its verified social media handles to communicate to the people the steps that is being taken to manage the fallout of the conflict in West Asia.

Addressing a Bharatiya Janata Party-led National Democratic Alliance rally in Kerala's Kochi, Modi said that the Congress "yuvaraj" (prince) doesn't know about the developments taking place in the country as he was unaware that the youth and various companies in India, including in Kerala, were into drone manufacturing.

Referring to the West Asia crisis, the PM said he claimed that the India of today does not leave its citizens stranded elsewhere and that the central government was working to ensure that all help is provided to Indians stuck in the Gulf region. He said the Congress was playing politics on the issue by making "provocative and irresponsible statements." The PM said the Gulf countries were looking after Indians who live and work there well, and he was grateful to them for that.

PM NARENDRA MODI SAID CONGRESS WAS PLAYING POLITICS ON THE ISSUE BY MAKING 'PROVOCATIVE AND IRRESPONSIBLE STATEMENTS'

The Ministry of External Affairs (MEA) on Wednesday said two Indians were killed, and one is missing, when merchant vessels came under attack during the ongoing war in West Asia. MEA spokesperson Randhir Jaiswal said the control rooms of the ministry and that of its missions in the region are functioning round the clock and helping out Indians that have reached out. MEA officials said the airspace of some of the countries, especially Kuwait and Bahrain, is completely shut, and alternative arrangements have been made to fly out Indians from airports in Saudi Arabia. The Congress on Wednesday reiterated its demand for a full-fledged discussion in Parliament on the West Asia crisis that has led to energy shortage. Congress president Mallikarjun Kharge said the energy crisis is deepening in the country and people are being made to suffer the hardships.

"The country deserves the truth. We demand a full discussion on this crisis in Parliament and the Prime Minister must answer the nation," the Congress chief said.

Kharge said India's basmati exports are stuck, wheat exports disrupted, medicine prices likely to surge as raw material costs rise nearly 30 per cent, textile sector is facing cascading cost pressures and the price of aviation fuel is rising. "From ceramics and glass to FMCG and automobiles, every sector is feeling the heat. Every product likely to become costlier," Kharge said in a social media post.

In his letter to the PM, TN CM Stalin appealed to Modi to ensure the safe evacuation of Tamils stranded in West Asia and requested urgent intervention to address disruptions in LPG supply caused by the ongoing conflict in the region. Bengal CM Banerjee on Wednesday criticised the Centre for the LPG supply constraint. "The central government should have first ensured enough reserves of LPG, oil and gas. Without that, they have imposed restrictions sans any proper planning to tackle the situation," she said. Banerjee alleged that the Centre was focusing more on politics rather than addressing the issues arising out of the energy situation.

with PTI inputs

Shell declares force majeure to clients who buy Qatari LNG

REUTERS
London, 11 March

Shell, the world's largest liquefied natural gas trader, has declared force majeure on LNG cargoes it buys from QatarEnergy and sells to its clients worldwide, three sources told Reuters on Wednesday.

Qatar, the world's second-largest exporter of LNG, announced a production halt at its 77 million tons per annum (mtpa) facility last week and declared force majeure on LNG shipments.

Shell declined to comment.

Other Qatari LNG buyers, including TotalEnergies and some Asian companies, have received force majeure notices from Qatar and told customers they would not be selling them Qatari LNG as long as the facilities remain shut, two other sources said.

A source close to TotalEnergies said the French oil and gas major has not declared force majeure, a notice used to describe events outside a company's control, such as a natural disaster, which usually releases it from contractual obligation without penalty.

Both Shell and TotalEnergies have long-term partnerships with QatarEnergy and are partners in the company's massive North Field expansion project which aims to boost capacity by 2027.

Sources told *Reuters* last week that the force majeure notices sent to clients stated that LNG deliveries for March will not be affected, with the impact being felt as of April.

Business Standard, Delhi, 12/03/2026
Page No: 8, Size: 37.15cm × 31.94cm

IEA to release record 400 million barrels from emergency oil reserves

AGENCIES
11 March

The International Energy Agency (IEA) agreed to discharge 400 million barrels from emergency oil reserves, its largest ever release, as governments seek to contain a price spike driven by the Middle East war.

"The oil market challenges we are facing are unprecedented in scale," IEA Executive Director Fatih Birol said Wednesday in a statement. "IEA member countries have responded with an emergency collective action of unprecedented size." The decision was unanimous, Birol said, without specifying the pace, duration and location of the planned fuel releases — details that will be key for energy markets. Japan said earlier it would unilaterally release about 80 million barrels, starting as soon as March 16.

Oil soared to almost $120 a barrel in London earlier this week as flows through the Persian Gulf's critical Strait of Hormuz remained essentially halted, though futures have since eased — in part on expectations that governments would tap their oil reserves. Prices dipped following Wednesday's announcement, before ticking back up. The most important thing for the stability of energy markets remains the resumption of traffic through the strait, Birol added.

IEA COORDINATES STOCKPILE RELEASES FOR OECD NATIONS. ITS 32 MEMBERS HOLD OVER 1.2 BILLION BARRELS IN PUBLIC EMERGENCY STOCKPILES

The IEA's move exceeds the 182.7 million barrels that member states ultimately put into the market in 2022 after Russia invaded Ukraine. That action, formally approved at a meeting of the agency's governing board in March of that year, equated to a release of 2 million barrels a day in its initial month, and was subsequently extended and supplemented.

But potential supply losses from this crisis may be much bigger than in 2022. The IEA, which co ordinates stockpile releases for OECD countries, has said its 32 members hold more than 1.2 billion barrels in public emergency stockpiles, including the largest buffer, the US Strategic Petroleum Reserve. There's a further 600 million barrels of industry stocks under government obligation. These countries are obligated to hold at least 90 days of net oil imports, which can consist of stockpiles maintained exclusively for emergency use or inventories held for commercial purposes, as well as stocks stored under bilateral agreements.

South Korea will release 22.46 million barrels of oil from strategic reserves, joining other IEA members, the country's industry ministry said.

Britain said it would contribute 13.5 million barrels of oil to a coordinated release from strategic reserves, joining other IEA members. "With this action, the UK is playing our part in working with our international allies to address the disruption in oil markets," energy minister Ed Miliband said in a statement.

The IEA has previously helped implement five such interventions: in the buildup to the 1991 Gulf War, after hurricanes Rita and Katrina in 2005, following the outbreak of civil war in Libya in 2011, and twice in 2022 in response to disruptions connected to the Ukraine war.

RESTAURANTS TURN TO PNG, INDUCTION COOKING

As LPG supply falters, eateries flag new concerns over staff wages, ops

OUR CORRESPONDENT

NEW DELHI: As irregular LPG supplies grip kitchens across Delhi, many restaurants run out of their fuel stock, creating challenges from menu changes to rising costs and concerns over staff wages.

Industry representatives say many eateries in the capital are trying to manage the situation through adjustments. However, if the disruption continues, smaller establishments may struggle to handle rising costs without affecting staff wages.

With the widening West Asia conflict, the government has prioritised the allocation of domestically produced natural gas for LPG production, compressed natural gas (CNG) and piped cooking gas sectors.

Under the revised allocation, the requirements of these sectors will be fully met before being supplied to other industries, according to a gazette notification.

Manpreet Singh, Honorary Treasurer of the National Restaurant Association of India (NRAI), told PTI that many establishments in Delhi are not receiving regular LPG supplies, with several of them shifting to alternatives like piped natural gas and induction cooking.

He said restaurants are promoting dishes that require less gas or are cooking larger quantities using induction appliances.

If the situation continues, the rising costs will affect staff wages and employment, particularly in the unorganised sector. Restaurants may have to reduce the variety of food they offer and rely more on bulk cooking of certain dishes, Singh said.

Small restaurant owners say they are facing operational stress due to irregular supplies. The owner of Shahdara's Urban Kebab said their LPG stock has run out, and irregular supply is making daily kitchen operations difficult.

"As a small restaurant, it is difficult to manage such disruptions because we do not have the resources like large chains. If the situation continues, we may have to cut operational costs, which could include reducing staff wages or even letting some workers go," he said.

The founder of The Piano Man chain, Arjun Sagar Gupta, said LPG supplies to their establishments have stopped, forcing them to depend on piped natural gas.

"Supplies have stopped. Piped natural gas is active, but Indraprastha Gas Limited (IGL) has also issued a circular. So we are trying to identify what all can be made without gas and trying to get information on when supplies will resume," he said.

Street vendors dependent on LPG may face severe difficulties if supply disruptions continue, said Sandeep of the Indian Hawkers Association, warning some may be forced to buy cylinders at higher prices. Restaurant groups said limited LPG stocks could impact operations, though outlets using PNG report no disruption.

LPG supply 'disruption' worries Delhi residents; students forced to eat outside

OUR CORRESPONDENT

NEW DELHI: Concerns over LPG supply have begun troubling residents and students in the capital, with many households shifting to induction stoves while others rely on outside food as the widening West Asia conflict disrupts energy supplies.

Resident groups said the situation is fuelling anxiety among families with limited LPG stock, as uncertainty persists over when they will receive refills. Atul Goyal, president of the United Residents of Joint Association (URJA), an umbrella body representing about 2,500 RWAs across Delhi, said several residents have approached the organisation complaining that they are unable to obtain gas cylinders and are being forced to rely on alternatives.

He said many households have started using induction stoves but are worried about a sharp rise in electricity bills if the situation continues.

> 'Situation is fuelling anxiety among families with limited LPG stock, as uncertainty persists'

BN Jha, president of the Mukherjee Nagar RWA, said the shortage is particularly affecting students who live alone or in paying guest (PG) accommodations in the area, which has a large student population. Several students have reported that they are unable to get LPG refills and are therefore compelled to rely on outside food, increasing their daily expenses. In some PGs, meal services have also been reduced.

Residents dependent on piped natural gas (PNG) have also expressed concern. BS Vohra, president of the Federation of North East Delhi RWAs, said households with PNG connections generally do not maintain LPG connections as backup, raising fears if piped supply is disrupted.

Millennium Post, Delhi, 12/03/2026
Page No: 2, Size: 10.08cm × 8.18cm

No fuel shortage: Govt

NEW DELHI: The Delhi government on Wednesday clarified that there is no shortage of LPG, petrol, diesel or piped natural gas (PNG) in the national capital and urged residents not to panic over rumours circulating about fuel supplies.

A review meeting chaired by the Chief Secretary of Delhi was held with officials from the Food, Supplies and Consumer Affairs Department, Delhi Police, the Revenue Department, Indraprastha Gas Limited and oil marketing companies to assess the situation. Officials informed the meeting that fuel supply chains remain stable despite speculation linked to tensions in West Asia. According to the companies, petrol, diesel and domestic LPG stocks in Delhi are sufficient and deliveries are continuing normally.

Authorities also noted that LPG cylinders are being delivered within two to three days of booking, although the booking interval has been revised from 21 to 25 days. MPOST

NEW DELHI IMPORTS ABOUT 2.2 MILLION TONNE OF LNG A MONTH

India gets 8 LNG cargoes in March; 19 more soon

SAURAV ANAND
New Delhi, March 11

INDIA RECEIVED ABOUT eight liquefied natural gas (LNG) cargoes totalling roughly 0.56 million tonne (mt) between March 1 and March 10--mostly from Oman--about 15% lower than the same period last month, as tensions around the Strait of Hormuz disrupt global LNG shipments, according to data from ship-tracking firm Kpler shared exclusively with the *FE*.

During the same period in February 2026, India received around 0.7 mt of LNG, indicating a slowdown in arrivals.

However, 18–19 additional LNG cargoes totalling around 1.3 mt are expected to arrive in India later this month, based on Kpler AIS projections. These shipments are likely to originate from Qatar, the United States, West Africa and Mozambique, although continued disruption in the Gulf could affect scheduled deliveries.

India imports roughly 2.2 mt of LNG every month, leaving the country exposed to supply disruptions when shipping through critical routes such as the Strait of Hormuz is affected.

The supply crunch has intensified after maritime security concerns left 51 LNG carriers stranded on either side of the Strait, tightening availability and pushing freight rates higher.

According to Kpler data, 16 LNG carriers remain idle in the Middle East Gulf near Qatar's 77 mtpa Ras Laffan LNG export complex and Abu Dhabi's Das Island LNG terminal. On the other side of the strait, 35 carriers are waiting in the Arabian Sea to enter the Gulf, with around 26 expected to call at Ras Laffan.

The disruption poses a significant risk for India, which sources around 53% of its LNG imports from Qatar and the UAE.

"India remains materially exposed to the immediate supply risks following Qatar's force majeure and the sharp rise in Asian LNG prices," said Sonal Ranjan, LNG & Natural Gas Market Analyst at Kpler.

"While Indian buyers are scouting alternative cargoes from the US Gulf Coast and West Africa, higher prices are likely to drive demand adjustments in price-sensitive sectors such as gas-fired power and industrial consumption, while city gas distribution and the fertilizer sector are likely to remain relatively shielded due to policy support," she added.

India consumes roughly 190–195 million standard cubic metres per day (mmscmd) of natural gas, nearly half of which is met through imports in the form of LNG.

To manage supply risks, the government issued an order under the Essential Commodities Act prioritising gas allocation to key sectors. Supplies are directed first to piped cooking gas (PNG) households, compressed natural gas (CNG) for vehicles and LPG production, which will receive 100% of their average gas consumption over the past six months.

Other sectors face restrictions. Industries and commercial consumers connected to the national gas grid will receive 80% of their recent average supply, while fertiliser plants will receive 70% of their allocation.

With cargo movements slowing in the Gulf and buyers competing for replacement volumes, analysts say importers may increasingly rely on supplies from the US Gulf Coast, West Africa and Australia to bridge the gap.

IN THE PIPELINE

- Most early March cargoes came from Oman, while 18–19 more shipments of about 1.3 mt are expected later this month
- Shipping disruptions around the Strait of Hormuz have slowed LNG flows and raised uncertainty over deliveries

- About 51 LNG carriers are stranded, tightening vessel availability and pushing freight rates higher
- 16 vessels are idle near the Ras Laffan LNG Terminal and Das Island LNG Terminal
- Qatar and the UAE account for about 53% of India's LNG imports, increasing exposure to Gulf supply risks

Millennium Post, Delhi, 12/03/2026
Page No: 11, Size: 13.86cm × 20.51cm

India's Russian oil buy rises 50% in March amid supply shortfall

OUR CORRESPONDENT

NEW DELHI: India's purchase of Russian crude oil has surged 50 per cent in March as New Delhi tapped alternate sources to make up for the shortfall arising from disruption in the Middle East amid a widening military conflict.

India bought about 1.5 million barrels of Russian oil this month, up from 1.04 million bpd in February, ship tracking data showed.

India, the world's third-largest crude importer, sources 88 per cent of its oil needs from abroad. It consumes 5.8 million barrels per day, of which 2.5-2.7 million barrels came from Middle East countries like Saudi Arabia, Iraq, and the UAE via the Strait of Hormuz.

The chokepoint also carried 55 per cent of India's cooking gas (LPG) and 30 per cent of liquefied natural gas (LNG), used for power, fertilizers, CNG, and household cooking. The ongoing conflict has largely halted shipments through the strait, forcing India to seek alternative crude sources from Russia.

"India was expected to import around 2.6 million barrels per day of crude via the Strait of Hormuz in March. At the same time, we are seeing a notable pickup in Russian barrels. "Based on vessel tracking and credible market sources, incremental Russian crude imports in March could reach 1-1.2 million bpd (over and above the February volumes), which means the effective shortfall from Hormuz exposure narrows to around 1.6 million bpd," said Sumit Ritolia, analyst at Kpler.

India bought about 1.5 million barrels of Russian oil this month, up from 1.04 million bpd in Feb, ship tracking data showed

In 2025, India's net refined product exports averaged around 1.1 million bpd. Additionally, there has been a strong push to diversify crude sourcing from alternative suppliers.

"Crude supply risk can be partially mitigated through diversification, and Russia flows. Refined product supply remains relatively comfortable," he said, adding LPG availability is the real variable to monitor in the coming weeks.

India consumes around 1 million bpd of LPG. Only 40-45 per cent is produced domestically, the remaining 55-60 per cent is imported. Of these imports, around 80-90 per cent typically transit through the Strait of Hormuz, making the supply chain particularly sensitive to disruptions in the region.

"Refineries can optimise LPG output by shifting feedstocks away from petrochemical production toward LPG recovery and by adjusting unit operations to maximise LPG yields," he said. "That said, such optimisation can only provide marginal incremental supply and cannot materially reduce India's reliance on LPG imports."

Even if refineries manage to increase LPG output by 10-20 per cent above current domestic production, domestic supply would only rise to roughly 47-50 per cent of total demand, leaving a significant gap that must still be filled through imports, he said adding while sourcing LPG from suppliers outside the Middle East is possible, voyage times are significantly longer, limiting how quickly disrupted cargoes can be replaced.

"The Strait of Hormuz is also a critical route for global LPG trade, and any disruption in the area immediately raises risks for LPG supply and shipping flows.

"A large share of LPG exports from the Middle East - particularly from Qatar, Saudi Arabia and the UAE - passes through Hormuz, making the chokepoint vital for Asian importers," he said. "India is one of the world's largest LPG importers and relies heavily on Middle Eastern supply, meaning any disruption in the region could tighten availability for the country." India consumes around 900-1000 kilo bpd of LPG, out of which 600 kbd is imported, and in that, 80-90 per cent is from the Middle East.

Financial Express, Delhi, 12/03/2026
Page No: 2, Size: 38.66cm × 15.24cm

Oil surge risks over 50 bps dent to FY27 GDP, say economists

KULDEEP SINGH
New Delhi, March 11

MUTED OUTLOOK

CARE
Above **$100/barrel** could trim **70 bps** from GDP

IDFC
$90/barrel cuts growth to **7% from 7.5%**

HDFC Bank
Every **10%** oil rise cuts **20–25 bps**

■ India imports **89%** of crude; half via Strait of Hormuz

DBS/QuantEco
$100/barrel could cut GDP **40–60 bps**

■ Conflict resolution may push prices back to **$60–70/barrel**

A SUSTAINED SURGE in crude oil prices amid the US-Israel-Iran conflict could shave off more than 50 basis points from India's gross domestic product (GDP) growth in FY27, economists warned on Wednesday. The Economic Survey 2025-26 projected real GDP growth for FY27 at 6.8–7.2%.

Brent prices rose to $91.37 per barrel on Wednesday, up 4.07% from Tuesday.

Rajani Sinha, Chief Economist at CARE Ratings, highlighted India's vulnerability as a major crude oil importer to sustained high oil prices. She stated that if crude oil prices remain above $100 per barrel, it could shave off more than 70 basis points (0.7 percentage points) from India's GDP growth in FY27. Her pre-war FY27 GDP growth forecast stood at 7.2%.

Gaura Sengupta, Chief Economist at IDFC First Bank, provided a calibrated view. She noted that the baseline real GDP growth forecast for FY27 stands at 7.5%. However, if crude oil prices average around $90 per barrel for a full year, real GDP growth is expected to moderate to 7%, implying a drag of around 50 basis points. This impact would stem primarily from higher import bills, a widened current account deficit, elevated input costs for industries, and potential second-round effects on inflation and consumer spending, assuming limited or delayed pass-through to retail fuel prices to shield consumers.

Meanwhile, HDFC Bank estimated a 20–25 basis points fall in GDP growth for every 10% increase in oil prices. "In our base case, we estimate GDP growth at 7.2% in FY27. However, this was based on commodity prices remaining contained and oil averaging between $60-70 per barrel. We estimate that for every 10% increase in oil prices (sustainably), GDP could be lower by 20-25 bps," HDFC Bank said in its analysis on West Asia Conflict.

India is highly dependent on crude imports, with 89% of its crude oil requirements met through imports. Half of these imports come from Gulf nations and are transported through the Strait of Hormuz. The HDFC Bank report noted that, besides oil, the Middle East is a major supplier of natural gas and fertilizer feedstocks. "20% of global Liquefied Natural Gas (LNG) trade passes through the Strait of Hormuz, driven primarily by Qatar," the report highlighted.

Radhika Rao, Senior Economist at DBS Bank, stated that an increase in crude prices to $90 per barrel could shave off 25 basis points from FY27 GDP growth. If prices surge to $100 per barrel, the drag would be around 40 basis points.

QuantEco Research has estimated an impact of 60 basis points on GDP growth if crude prices move to $100 per barrel. QuantEco projected FY27 GDP growth at 6.6-6.8% in a pre-war scenario. Following the geopolitical tensions in the Middle East, QuantEco revised its growth projection to 6.4-6.6% if oil prices stay at $90 per barrel and 6-6.2% if prices surge to $100 per barrel.

However, the HDFC Bank report noted that if the conflict were to resolve over the next 10-15 days, the situation could quickly revert to a scenario where oil prices fall back within a range of $60-70 per barrel.

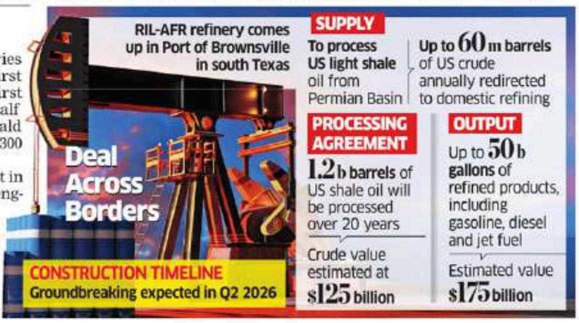
Economic Times, Delhi, 12/03/2026
Page No: 1, Size: 40.75cm × 37.49cm

PLANS FOR TEXAS SHALE OIL UNIT

Trump says RIL Will Build US Refinery in '$300b Deal'

Says Reliance will tie up with America First Refining, thanks co for investing

Our Bureau



Mumbai: Reliance Industries (RIL) will partner America First Refining (AFR) to set up the first major oil refinery in the US in half a century, with President Donald Trump hailing it as a "historic $300 billion deal."

The project, which will be built in Brownsville, Texas, will strengthen American energy production and create thousands of jobs, Trump said. Construction is expected to begin after a groundbreaking ceremony scheduled for the second quarter of 2026.

"This is a historic $300 billion deal—the biggest in US history—a massive win for American workers, energy and the great people of South Texas," Trump said in a post, thanking Reliance for a "tremendous investment."

According to the US Energy Information Administration, the US had 132 operating petroleum refineries as of January 2024.

RIL, with a market capitalisation of ₹18.82 lakh crore ($204 billion), operates the world's largest integrated, single-site refinery complex in Jamnagar, Gujarat. This has the highest crude processing capacity globally, of 1.4 million barrels per day (mmbpd). It also has the world's highest complexity index of 21:1.

More Refining in US ▸▸ 10

More Refining in US

▸▸ From Page 1

This allows it to turn the heaviest crude oil into high-quality petroleum products.

Reliance Industries stock ended at ₹1,391.1, down 1.3% on the BSE, on Wednesday.

The announcement comes amid volatility in global oil markets, with the Gulf war disrupting supplies and pushing prices higher.

While the US shale oil revolution since the mid-2000s dramatically boosted the country's production, lack of refinery capacity that can process the lighter grade thus produced has meant much of it has to be sent overseas.

During 2014-24, the US exported nearly 10 billion barrels of crude, while still importing roughly 28 billion barrels, costing American consumers and workers more than $1.8 trillion, said the hitherto little-known AFR.

"The US has a surplus of light shale oil but a shortage of refining capacity designed to process it," said Trey Griggs, president of AFR. "Building this refinery will unlock a major expansion of American energy production."

The US company said the refinery will use light shale oil sourced primarily from the Permian Basin in west Texas.

"Once operational, the AFR refinery will redirect up to 60 million barrels of US crude annually back into domestic refining—strengthening American industry, energy security and economic growth," AFR said, adding that the facility will be located at a deepwater port, enabling refined fuels to be distributed to both domestic and international markets.

The company said the announcement came after it received a "nine-figure investment from a global super major at a 10-figure valuation." It didn't name this entity.

SHALE DIVERSIFICATION

According to industry watchers, a 60-million barrels per year crude oil refinery could have a capacity of 7-8 million metric tonnes per annum and may cost $10-12 billion in investment, US labour costs included.

RIL may hold a 50.39% stake in the refinery, said people with knowledge of the matter.

"Capex could be higher if associated petrochemical facilities are planned for a project of this magnitude," JP Morgan said in a report on the development. "Given the size, it is likely that Reliance would engage with local partners and, assuming a stake of 50% with a 30-70% equity-debt funding mix, we estimate RIL's implied equity investment could be $10 billion."

RIL did not respond to queries.

"Reliance hedges Jamnagar Gulf exposure via this US shale diversification," an analyst said. "But given RIL's scale of operations, this is not a very big refinery. However, this could help RIL make inroads in accessing Texas and Venezuelan crude. The financial implications of this deal can only be ascertained once more details are made public."

The refinery will operate under a 20-year offtake agreement to purchase and process approximately 1.2 billion barrels of US light shale oil, estimated to be worth around $125 billion. Once operational, the facility is expected to produce up to 50 billion gallons of refined petroleum products, including gasoline, diesel and jet fuel, valued at roughly $175 billion. Combined, the energy agreement is projected to improve the US trade balance by about $300 billion, while significantly expanding the country's refining capacity, AFR said.

"The US trade imbalance will improve by $300 billion," it said.

RIL's investment in the conventional energy space in the US comes after a gap of about five years.

In 2021, RIL sold the last shale gas asset that it had held for nearly 11 years.

Between 2010 and 2013, RIL bought stakes in three upstream oil exploration joint ventures with Chevron, Pioneer Natural Resources, and Carrizo Oil and Gas, as well as a midstream joint venture with Pioneer, as the company was bullish on shale gas. However, the drop in crude oil prices since late 2014 hit valuations of oil and gas assets, and shale gas blocks suffered more than conventional oil and gas, as they were economically viable only when prices were above a certain threshold.

Economic Times, Delhi, 12/03/2026

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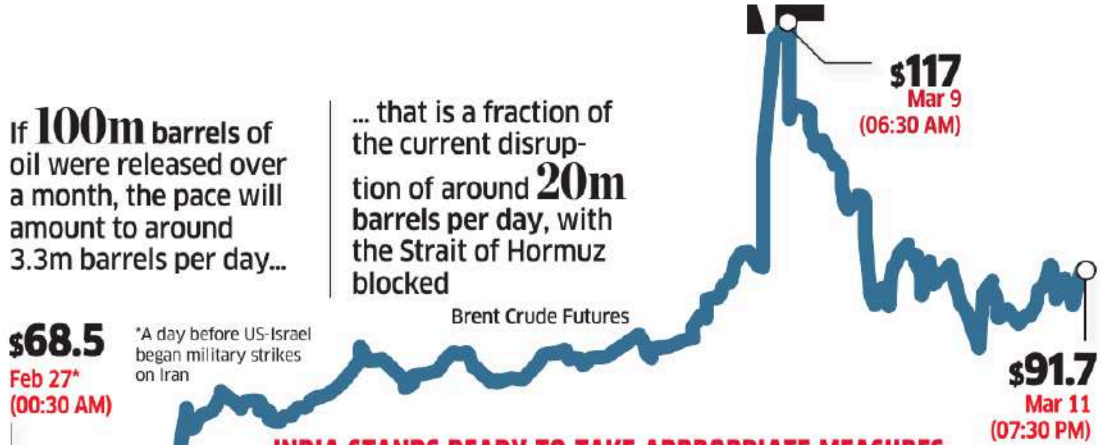


INDIA STANDS READY TO TAKE APPROPRIATE MEASURES TO SUPPORT GLOBAL MARKET STABILITY: OIL MINISTRY

Brent it Like IEA Energy Body Seeks Release of 400m Barrels

Paris | London: The International Energy Agency on Wednesday agreed to release 400 million barrels of oil, the largest such move in its history, to try to rein in crude prices that have soared due to supply shocks from the U\S-Israeli war with Iran.

The IEA said the release had been backed unanimously by 32 member countries, the sixth such move it has made since its creation in the 1970s. It is aimed at preventing a further rise in oil prices on fears that Iranian attacks will continue to block West Asia oil exports from reaching markets. "The oil market challenges we are facing are unprecedented in scale, therefore I am very glad that IEA member countries have responded with an emergency collective action of unprecedented size," said IEA executive director Fatih Birol.

NEW DELHI BACKS MOVE

India welcomed the decision. "India, as an Associate Member of the International Energy Agency (IEA) and an active participant in international energy cooperation, welcomes the IEA's decision to release emergency oil stocks amid the prevailing supply disruptions," the oil ministry said in a statement.

"India stands ready to take appropriate measures, as necessary, to support global market stability in alignment with the efforts of the International Energy Agency," it further said.

The Paris-based IEA made its comments as French President Emmanuel Macron chaired a meeting of G7 leaders to discuss the issue.

The emergency stocks will be made available to the market over a timeframe that is appropriate to the national circumstances of each member country," the IEA said, adding this would be "supplemented by additional emergency measures by some countries".

US President Donald Trump, who launched attacks on Iran alongside Israel on February 28, was shown at the end of a video of the G7 meeting chaired by Macron saying: "I think we are having a tremendous impact on the world."

Analysts have said the pace of daily stock releases would matter as much as the overall size. If 100 million barrels were released over the next month, the daily pace will amount to around 3.3 million barrels per day—a fraction of the current disruption of around 20 million barrels per day.

Reuters/Our Bureau

Economic Times, Delhi, 12/03/2026

Page No: 5, Size: 19.47cm × 10.21cm

'Saudis Upped Oil Production Before War'

London: OPEC said on Wednesday that Saudi Arabia sharply increased oil production in February ahead of US and Israeli strikes on Iran and kept its forecasts for relatively strong global oil demand growth this year.

Saudi Arabia boosted output and exports as part of a contingency plan in case any US strike on Iran disrupted supplies, sources familiar with the plan said in February.

OPEC, in a monthly report on its website, said that Saudi Arabia told the group its February supply to the market was 10.111 million barrels per day, while production reached 10.882 million bpd. The kingdom reported January output of 10.10 million bpd. **Reuters**

Hindu, Delhi, 12/03/2026

Page No: 4, Size: 38.39cm × 30.32cm

States feel the LPG cylinder pinch

Several governments swing into action, reviewing supply chains and taking contingency measures, as queues of people waiting for gas cylinders become a common sight; Punjab govt. tables Assembly resolution on Centre's 'failure'; Bihar Dy. CM warns of stern action against black marketeers

The Hindu Bureau
NEW DELHI

Mission Wednesday: (From left) A long queue at an LPG depot in Lucknow; cylinders being delivered in Srinagar; and a lucky customer in Guwahati. AP, IMRAN NISSAR, ANI

Amid the ongoing war between U.S.-Israel and Iran, several States swung into action on Wednesday, reviewing supply chains and taking contingency measures.

Punjab's Aam Aadmi Party (AAP) government tabled a resolution in the Assembly on the Union government's "failure" on foreign policy and its impact on the country's energy security.

The resolution, tabled in the House by Food, Civil Supplies and Consumer Affairs Minister Lal Chand Kataruchak, will be discussed in detail in the Assembly on Thursday.

"This House records with deep concern and serious dissatisfaction that due to the Union government's failed foreign policy and imbalanced energy policy, a situation of energy crisis has emerged across the country," Mr. Kataruchak said, adding that the crisis is clearly visible in Punjab as well, where the supply of commercial gas cylinders has been disrupted in several areas and restaurant, dhaba and small hotel operators are being forced to wait for long periods to obtain cylinders.

Education Minister Harjot Singh Bains pointed to the emerging challenges in the fertiliser and energy sectors. "National Fertilizers Limited (NFL) units at Nangal and Bathinda are almost shut. From where will we get the urea? Why are our plants in Nangal and Bathinda closed while NFL's Panipat (Haryana) unit runs at full capacity?" he said.

Mamata holds meeting

West Bengal Chief Minister Mamata Banerjee held a meeting to review the supply shortages and said the companies supplying LPG and CNG should come up with a standard operating procedure and start rationing supplies. Ms. Banerjee said her government will not allow hoarding of gas cylinders and has instructed District Magistrates and Superintendents of Police to that effect. She said Industries Secretary Vandana Srivastava will be the point person in the State for coordinating with LPG and CNG distribution companies.

Amid long queues outside gas agencies in Uttar Pradesh, the Congress accused the Bharatiya Janata Party (BJP) government of failing to check black marketing. "Just as the BJP abandoned the country to die during the COVID-19 pandemic, the same scenario is being repeated today in the name of gas supply. The supply chain is in shambles, and the government is evading accountability," said U.P. Congress chief Ajay Rai.

Videos of long queues from gas stations in Shravasti went viral, including one of a woman fainting. "These images from Shravasti are a slap in the face to the government's claims of providing gas to every household," posted a user on X.

'Unable to book'

In Bihar, Deputy Chief Minister Samrat Choudhary said "stern and quick action" will be taken against those found engaged in black marketing or hoarding of cylinders.

In parts of Kaimur, Darbhanga, Motihari and Gaya, several people claimed that they got LPG cylinders after a five-day-long wait. In State capital Patna, consumers in several localities complained that they were unable to book cylinders either on phone or even after visiting the agency office.

Situation reviewed

In Haryana, Chief Minister Nayab Singh Saini chaired a meeting "to review the situation arising from rumours about disruption in LPG supply", according to an official statement. Oil companies have informed that the supply of petrol, diesel, and domestic LPG is presently normal and that adequate stock is available though there is a temporary disruption in the supply of commercial cylinders, the statement also noted.

The Madhya Pradesh government has issued directions to District Collectors to manage LPG cylinder supply arrangements and prevent hoarding or black marketing. In a letter dated March 10, the government asked the Collectors to regularly review stock availability and suggest potential alternatives to commercial consumers.

In Himachal Pradesh, Chief Secretary Sanjay Gupta held a review meeting to assess the availability of fuel and gas.

The State presently has sufficient stock of petrol, diesel, and LPG. However, the supply of commercial LPG cylinders has been slightly affected.

Financial Express, Delhi, 12/03/2026

Page No: 8, Size: 10.58cm × 23.28cm

Availability over price

Gas supply crunch after West Asia turmoil shows full pricing freedom for complex fields can't wait

THE WAR IN West Asia has quickly exposed the deep vulnerabilities of India's energy sector. The flaring up of crude prices has adverse ramifications for domestic inflation, the current account, government finances, and economic growth. However, as far as the war-induced crippling of natural gas supplies is concerned, the crisis has been prompt. This explains why QatarEnergy's halt in liquefied natural gas (LNG) production has forced the government to immediately consider rationing gas supplies and reprioritising allocation across sectors. Transportation, cooking, and farming already receive top priority. These sectors would now get an even larger share of the available (reduced) gas supplies, likely leaving industrial users like the petrochemical-to-plastics value chain (the cracker route) high and dry.

Nearly half of 195 million standard cubic metres per day (mmscmd) of gas consumed in the country is met through capital-intensive LNG imports. As much as 60 mmscmd of gas, or around two-thirds of imports, is currently unavailable due to the closure of the Strait of Hormuz and the force majeure declared by Qatar. In fact, India's gas consumption growth is far below potential and stunted. The green-transition target to raise the share of this hydrocarbon to 15% of the country's energy mix by 2030 doesn't appear to be within reach. The dynamics of India's gas economy remained skewed for many years. The earlier pricing systems—opaque administered caps and the one linked to global gas hubs—were far removed from domestic realities or cost structures. Uncertainties over remunerative prices made investors cautious, causing stagnant production and drying up of new discoveries.

Overall high costs have also made gas unviable for power generation. Gas-based power stations are heavily under-utilised or stranded, with an average plant load factor of just around 15% in off-summer periods. In fact, the National Electricity Plan has turned silent on the use of this fuel. As an industrial feedstock, gas has often stoked inflation, with the cost of its volatile prices borne not only by consumers at large, but also by the government. Retail prices of urea are kept unchanged, irrespective of the vagaries of the global LNG market.

However, there is reason to believe that implementation of the Kirit Parikh Committee's recommendations since April 2023 has made gas pricing a little more investor-friendly. As for the legacy nomination fields run by the ONGC-OIL, the price band linked to Indian crude basket, along with monthly revisions and annual ceiling escalation, is seen to balance producer viability and consumer interests. With the stated purpose of attracting investment in complex offshore fields, a separate pricing policy is in place, with a far more liberal cap benchmarked to imported LNG price. The average production from the fields run by the Reliance-BP combine in the Krishna Godavari (KG) basin, rose sharply from 20 to 27 mmscmd between 2022-23 and 2023-24 and is now around 28 mmscmd. The combine's current production is around 30% of total domestic gas output at its peak, while ONGC has also sharpened its focus on its assets in the KG basin. The government must not defer implementing complete pricing freedom for difficult-field gas. As per Parikh panel's report, this was to take effect by this January, but it has yet to materialise. Along with the new, greater emphasis on coal-bed methane projects, market-determined pricing for deep and ultradeep water gas would help India prepare itself better for global energy supply shocks like the present one.

Statesman, Delhi, 12/03/2026
Page No: 4, Size: 16.93cm × 15.08cm

Adequate stock of LPG and PNG available: Delhi govt

STATESMAN NEWS SERVICE
New Delhi, 11 March

Denying shortage of fuel in the national capital, The Delhi government has confirmed that supply of LPG, petrol, diesel, and PNG is completely normal.

The government has appealed to residents not to pay attention to rumours being circulated about gas supply and avoid unnecessary panic buying or hoarding.

On Wednesday, a key review meeting was held under the chairmanship of the Chief Secretary of Delhi in the presence of senior officials from the Department of Food, Supplies and Consumer Affairs, Delhi Police, the Revenue Department, Indraprastha Gas Limited and various oil marketing companies.

Consumers outside an LPG agency amid panic over supply disruptions on Wednesday. Subrata Dutta

After reviewing the situation in detail, the meeting focused on rumours suggesting that the LPG supplies could be disrupted due to war-like developments in the Middle East. Officials from Indraprastha Gas Limited informed that the Ministry of Petroleum and Natural Gas, Government of India, issued an order on March 9, 2026 that provides guidelines to ensure the proper and equitable distribution and availability of domestic PNG and CNG in priority sectors.

The officials concerned have clarified that there was no shortage of domestic PNG in Delhi.

At the same time, after revising supply priorities, nearly 80 per cent uninterrupted gas supply has also been restored for industrial sectors.

Representatives of oil marketing companies stated that the supply of petrol, diesel, and domestic LPG in Delhi remains completely normal and that companies have sufficient stock available.

LPG shortages highlight import risks, and show why India must scale ethanol for cooking

Meet Up With a New Flame

Tushar Gandhi

Is it oil? Is it coal? No, it's Ethanolman!

Restaurants, hotels and eateries are running out of cooking gas. Indian Hotel & Restaurant Association (AHAR) says 20% of establishments in Mumbai have shut due to disrupted commercial LPG supply, warning that closures could reach 50% if the shortage continues. In Delhi-NCR, commercial cylinders are reportedly selling on the black market for up to ₹1,500.

The crunch, of course, stems from the US-Israel war against Iran and the ensuing conflict in West Asia that has disrupted tanker movement through the Hormuz Strait, route for 85-90% of India's LPG imports. Domestic LPG prices have risen by ₹60 in a week, pushing a 14.2 kg cylinder in Delhi to ₹913, the highest since August 2023.

With 62% of domestic LPG demand met through imports, this disruption was always a matter of when, not if. The crisis in commercial kitchens, however, is only the visible tip of the iceberg. India's cooking fuel vulnerability runs far deeper.

India has made progress under Pradhan Mantri Ujjwala Yojana (PMUY), connecting 32.99 cr households to LPG, including 10.33 cr subsidised connections. Yet, universal clean cooking remains elusive. About 500 mn people — nearly 40% of the population — rely on biomass fuels. Household air pollution from these fuels contributes to an estimated 1.2 mn premature deaths annually. Even within LPG-connected households, the ₹913-a-cylinder price — ₹613 for PMUY beneficiaries — pushes low-income households back to firewood and dung, particularly in rural areas where these fuels are available.

Even within LPG-connected households, the ₹913-a-cylinder price – ₹613 for PMUY beneficiaries – pushes low-income households back to firewood and dung, particularly in rural areas

To sustain LPG usage among the poorest, GoI has committed ₹12,000 cr in PMUY subsidies for 2025-26, and sanctioned an additional ₹30,000 cr in compensation to IOCL, BPCL and HPCL for under-recoveries on domestic LPG sales. This is the fiscal cost of a system structurally dependent on imported fuel.

While India scrambles to secure LPG supply, its ethanol distilleries are operating below full capacity. India's ethanol production capacity has grown to 1,822 cr litres, supported by about 500 distilleries nationwide. The E20 blending programme requires 1,016 cr litres annually, leaving a substantial surplus available for other applications.

Critically, cooking applications don't require anhydrous fuel-grade ethanol at 99.9% purity. 90-95% purity suffices, which lowers both production costs and the barrier to scaling. Diverting about 250 cr litres toward cooking would serve nearly 20 mn households without compromising E20 blending targets. The infrastructure to produce, store and move ethanol across India already exists.

Ethanol burns cleanly, producing primarily CO_2 and water vapour, with zero $PM_{2.5}$, and negligible toxic emissions compared to biomass. Centre for Science and Environment estimates that household cooking emissions in India exceed 350 mn tonnes of CO_2 annually, surpassing the entire transport sector. Ethanol clean cooking directly addresses this at scale.

Ethanol burns cleanly, producing primarily CO_2 and water vapour, with zero $PM_{2.5}$, and negligible toxic emissions compared to biomass

India's 4.5 mn street food vendors represent a compelling entry point for ethanol cooking deployment. These vendors operate in public spaces where LPG use is often restricted due to explosion risk. Ethanol stoves carry no such risk. Transitioning 1.1-1.3 mn urban vendors from biomass or kerosene to ethanol could reduce 3-4 mn tonnes of CO_2 annually, while materially improving occupational health and food safety outcomes.

The technology is ready, and its effectiveness is not untested. HPCL and IIT Guwahati have developed an ethanol-fuelled cookstove, and HPCL has announced plans for ethanol ATMs at retail outlets to enable household refills. A pilot in the Sundarbans tested ethanol stoves among households entirely dependent on forest wood, demonstrating viability in resource-constrained, off-grid environments. States are in active conversations about district-level pilots, with existing inter-state ethanol logistics. For example, Karnataka alone has an installed capacity of 270 cr litres, providing a ready supply chain.

UN's Food and Agriculture Organisation's (FAO) Global Bioenergy Partnership (GBEP) has documented bioethanol clean-cooking programmes. Validated pilots in Ethiopia and Mozambique — both resource-constrained with high biomass dependence — have demonstrated that ethanol cooking is technically viable, socially acceptable and replicable across diverse geographies. India, with its far larger distillery base, superior logistics infrastructure and existing policy frameworks, is better positioned than any of these countries to deploy ethanol cooking at national scale.

India's ethanol ecosystem has matured. But the policy framework has not kept pace. Two specific steps are needed:

1. GoI should designate bioethanol as an approved cooking fuel under PMUY, enabling its integration into the existing subsidy and distribution architecture.
2. 3 state-level pilots should be commissioned, drawing on existing distillery capacity, oil marketing companies (OMC) distribution networks, and stove technology validated at scale.

The fiscal arithmetic is unambiguous. Sustaining LPG import dependence at 62% costs over ₹42,000 cr annually in subsidies and under-recoveries. It leaves India structurally exposed to geopolitical shocks, as the current West Asian crisis has demonstrated. Bioethanol cooking is not a replacement for LPG. It is a domestically produced, import-independent complement that India's distilleries can supply today.

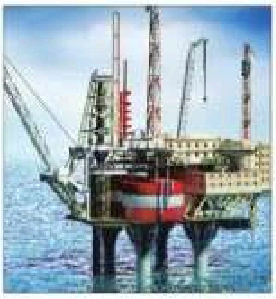
The capacity exists. The technology exists. The crisis to justify urgency is on every front page this week. What is needed now is a policy decision.

The writer is convenor, Bioethanol Clean Cooking Alliance (BCCA)

Financial Express, Delhi, 12/03/2026
Page No: 7, Size: 8.55cm × 19.63cm

Record 400 mn barrels of oil to be released: IEA

AMERICA HERNANDEZ
& ALEX LAWLER
Paris/London, March 11



THE INTERNATIONAL ENERGY Agency (IEA) on Wednesday recommended the release of 400 million barrels of oil, the largest such move in its history, to try to restrain soaring crude prices amid the US-Israeli war with Iran.

The IEA said the release had been unanimously agreed by 32 member countries, with timing to be set out in due course. The Paris-based IEA made its comments as French President Emmanuel Macron chaired a meeting of G7 leaders that will discuss the issue.

Germany's Economy Minister Katherina Reiche had earlier confirmed reports of the 400-million-barrel figure and said her country would participate in the release. The US and Japan would be the largest contributors to the IEA release, she added.

"Pressure came mainly from the US government which wants this release," an EU diplomat said, speaking before the IEA statement.

US Interior Secretary Doug Burgum welcomed reports of the planned release.

"This is the perfect time to think about releasing some of those to take some pressure off of the global price," he said in an interview with *Fox News*.

Burgum said, however, he did not believe the world was facing an energy shortage. "We've got a transit problem, which is temporary," he said.

"You have a temporary transit problem that we're resolving militarily and diplomatically, which we can resolve and will resolve."

Analysts have said the pace of daily IEA stock releases would matter as much as if not more than the overall size.

If 100 million barrels were released over the next month, the daily pace will amount to around 3.3 million barrels per day - a fraction of the current disruption of around 20 million barrels per day, with the Strait of Hormuz between Iran and Oman effectively blocked.

Oil prices rebounded on Wednesday as markets doubted whether the IEA's plan could offset potential supply shocks from the conflict.

—REUTERS

Hindu, Delhi, 12/03/2026
Page No: 15, Size: 18.94cm × 36.04cm

LPG output rises 25% since issue of supply maintenance orders

Consumers urged to refrain from panic booking; govt. working to expand the coverage of delivery authentication code system to address diversion

Saptaparno Ghosh
NEW DELHI

India's production of liquified petroleum gas (LPG) has increased 25% since the government instituted the supply maintenance order on March 8, Sujata Sharma, Joint Secretary at the Ministry of Petroleum and Natural Gas (MoPNG) told reporters at an inter-ministerial briefing here on Wednesday.

"It is because of these measures [that is, supply maintenance orders], India's domestic LPG production has increased by 25% and all this domestic LPG is being directed to household consumers," she stated.

Further, addressing the aspect of hoarding, she observed, "Feedback suggests some panic booking and hoarding has been triggered by misinformation." The senior official added, "I would want to inform the normal delivery cycle of domestic LPG remains [unaffected] at 2.5 days. Therefore, there is no need for customers to rush for booking cylinders, there is no need for panic booking."

Ms. Sharma also told reporters that the government was working to expand the coverage of delivery authentication code (DAC) system to 90% of domestic consumers to address issues relating to diversion at the distributor level.

Allaying fears: Joint Secretary of the MoPNG Sujata Sharma speaks during the inter-ministerial briefing on Wednesday. ANI

Concerns over a supply gauntlet in cooking gas emanated following the closure of the Strait of Hormuz by Tehran amid escalating tensions in West Asia.

Essential to note though, according to government data, India imports 60% of its LPG requirements of which 90% is routed through the Strait of Hormuz.

Further to address black-marketing, C. Senthil Rajan, Joint Secretary at the Ministry of Information and Broadcasting (MIB), who was also present at the press briefing, told reporters that the Secretary at the Union Ministry of Home Affairs had held a meeting with Chief Secretaries and the Director Generals of Police of all States and Union Territories to "take proactive efforts in preventing hoarding and any black marketing that could be going on in States". It was also suggested to institute a State-level spokesperson to "provide credible information to public".

Vessels in Persian Gulf

Rajesh Kumar Sinha, Special Secretary at the Ministry of Shipping and Waterways, told reporters that 28 vessels with Indian flags were operating in the Strait of Hormuz.

Of these, 24 are in the Western part of the Strait of Hormuz and 4 in the Eastern part of the Strait.

The vessels on the Western part of the Strait have 677 Indian seafarers on board, whilst 101 were onboard vessels in the Eastern part. "We are actively monitoring the vessels for their security and safety," Mr. Sinha informed.

DESPITE PRESSURE TO SERVE DOMESTIC DEMAND

Govt Holds Back on Fuel Exports Ban due to Logistics, Tax Hurdles

CONSTRAINTS: Exporters' existing contracts may be hurt, new storage mechanisms needed

Sanjeev Choudhary

New Delhi: India has so far held back from banning fuel exports despite a supply squeeze triggered by the Iran war, due to several constraints including the logistical challenge of moving and storing surplus fuels, the risk of undermining exporters' contractual commitments and the need to waive import taxes for an export-only refinery, people familiar with the matter said.

Reliance Industries is the country's main fuel exporter and operates two refinery units, one of which is dedicated entirely to exports. Nayara Energy is also a major exporter, although it has faced significant challenges since the EU imposed sanctions last year on the partly Russian-owned company.

China and Thailand have already curbed exports of petrol and diesel to secure supplies for domestic use, after the effective closure of the Strait of Hormuz disrupted crude and fuel flows to several countries.

Before India can impose any export ban, state-run fuel retailers would have to arrange purchases from exporting refiners, an industry executive said. If an exporter were forced to rely solely on its own storage for surplus fuel, tanks would begin to overflow within days, creating a new logistical problem. Offtake arrangements, logistics and storage would therefore need to be planned in advance so that refined products can be smoothly redirected to domestic demand centres, he said.

STORAGE SHORTFALL

If an exporter were forced to rely solely on its own storage for surplus fuel, tanks would overflow within days

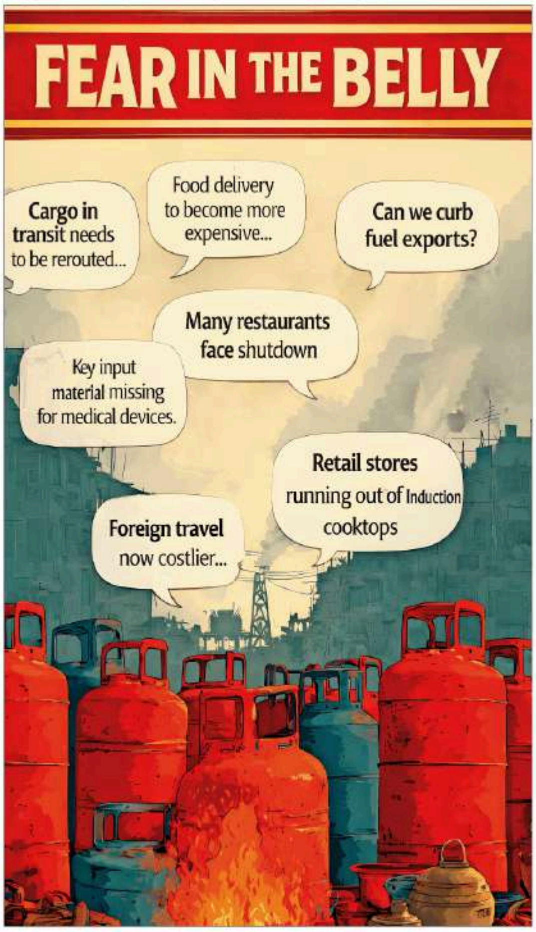
Exporters also have contractual commitments with overseas buyers, such as commodity traders or oil marketers, and would not want to breach these agreements because of the financial and reputational costs, another executive said.

However, if the government were to impose a ban, exporters could declare force majeure on their customers, he added.

If a refinery unit is dedicated solely to exports, it would require a waiver of import taxes to supply the domestic market—an option that would involve the government foregoing tax revenue, he said.

Greater access to Russian crude in recent days has helped ease the supply situation for Indian refiners, although it cannot fully replace the lost Gulf volumes. In any case, domestic refiners generally prefer selling to state fuel retailers because domestic prices are linked to international rates, ensuring better realisations. However, in the past they have avoided selling large volumes through their own retail networks when pump prices were effectively capped, choosing instead to export.

A government official recently said the ban had not been imposed because India did not want to add to turbulence in global markets. Meanwhile, refining margins have widened sharply since the start of the Iran war, boosting potential earnings for exporters.



Why is India staring at LPG deficit?

EXPLAINER

M. Kalyanaraman

With LPG shortage hitting day-to-day life in India, data suggest while the nation opted for a dramatic surge in LPG use, especially among poor households, driven by imports, there was no plan to boost long-term, strategic LPG reserves in parallel.

With more than 85% of all of India's imports having to cross Strait of Hormuz to reach the nation's shores and limited back-up storage, the disruption hit quickly unlike in the case of auto fuels where strategic reserves of crude oil and products are equal to two months of consumption.

The Indian LPG system is designed for operational flow, not stockpiling. And there are no concrete proposals currently to increase large underground storage either. The International Energy Agency (IEA) has flagged the lack of such storage as an infrastructural weakness in India.

Surge in domestic gas

IEA figures show India's LPG imports increased threefold from 2011-12 to 2024-25 to some 20 million tonne. Imports constitute some 60% of India's needs. India's import dependency has increased from 47% in 2015 to the current levels.

In FY26, imports had crossed 18 million tonne till January. India's total LPG consumption a month is some 3 million tonne making it the second-largest consumer of LPG in the world. But, the total storage capacity can feed less than half of that monthly requirement and almost all of it in tanks at import terminals such as Ennore.

In terms of long-term storage, India has two underground caverns for LPG – Mangaluru and Visakhapatnam with a total storage capacity of 1.4 lakh tonne. While Visakhapatnam storage was commissioned in 2007, only one has been commissioned since the ramping up of LPG consumption started – Mangaluru with 80,000 metric tonne or just a day's consumption.

In demand: A man sits on an empty LPG cylinder amid supply disruptions following the U.S.-Israeli war with Iran. REUTERS

Total underground storage amounts to 1.4 lakh tonne or less than two days of consumption

The total underground storage amounts to 1.4 lakh tonne or less than two days of consumption. India's daily LPG consumption stands at some 80,000 tonne with more than 85% going to households.

The country has 33 crore domestic LPG connections out of which some 10 crore were added since 2017 through the through Pradhan Mantri Ujjwala Yojana (PMUY).

The PMUY scheme sought to offer clean cooking gas to poor people as well, freeing women from the drudgery of firewood-based chulhas, cow-dung and kerosene stoves. The scheme gave deposit-free LPG connections to adult women from poor households and subsidised the purchase as well. The surge in Indian LPG consumption as well as import dependency is attributed to this scheme.

The MoPNG, in its demand for grants in 2025 in Parliament, said there were no plans for constructing additional caverns, besides the two. The Mangaluru cavern became operational in 2025.

India signed an LPG import agreement with the U.S. in February for 2.2 million tonne per year but the U.S. cargoes take some 45 days to reach India unlike the Persian Gulf cargoes.

Underground caverns

Europe can store roughly 25% of total annual gas consumption, says Christoph Halser, Senior Analyst, Gas & LNG Research, Rystad Energy, an energy research and business intelligence firm in Norway.

"Unlike for oil, where a mandate for 90 days emergency stock equivalent exists, European countries do not have a strategic government-controlled gas reserve and are not required to go by the EU.

The EU imposed storage filling targets for public storage facilities first in 2022, following the outbreak of war in Ukraine.

These mandate member countries to reach 90% filling levels before the winter, with exceptions for market disruptions and technical constraints," adds Mr. Halser.

India can be broadly divided into three geological zones relevant for such gas storage. The most proven is the Peninsular Shield–the Archean cratonic basement of granite, gneiss and charnockite underlying about 60% of peninsular India.

Both operational LPG gas caverns sit on this rock.

At Visakhapatnam, the storage cavern lies 162 to 196 metre below ground level in Precambrian gneiss, using the hydraulic containment principle.

At Mangaluru, the host rock is granitic gneiss, with the floor at 141 metre below mean sea level. The engineering is proven. The rock is cooperative.

The second zone is the Deccan Traps–the vast basaltic plateau covering some 5,00,000 square kilometre of western and central India. For storage purposes, the traps present challenges. Engineers India Limited, designing a new LPG facility on the west coast, has encountered difficulties.

The third zone is the salt formations of Rajasthan's Bikaner-Barmer belt. These halite deposits can be used as cavern storage.

Cheaper, faster

Salt caverns are cheaper and faster to construct, naturally impermeable, and capable of rapid injection and withdrawal.

A refinery is under construction at Barmer and crude pipelines traverse the region. EIL has signed a partnership pact with Germany's DEEP for salt cavern know-how.

A fourth option–depleted gas reservoirs in the Krishna-Godavari, Cambay and Mumbai offshore basins – is under study.

How the war in West Asia exposes India's LPG dependence

The ongoing conflict in the region has disrupted supplies in the country, forcing price hikes and emergency measures

DATA POINT

Devyanshi Bihani
Areena Arora

The war between the U.S.-Israel and Iran has put stress on India's Liquefied Petroleum Gas (LPG) supply, which was already heavily import dependent and in need of government aid. Just last year, the Centre paid India's three public sector Oil Marketing Companies (OMCs) – Indian Oil Corporation (IOCL), Bharat Petroleum Corporation (BPCL), and Hindustan Petroleum Corporation (HPCL) – ₹30,000 crore to subsidise their losses for selling cooking gas for cheap at a time of soaring prices globally.

However, now with war breaking out, India faces the possibility of disruptions to its LPG supplies and higher global prices. On March 7, domestic LPG prices increased by ₹60 per cylinder. Brent crude briefly rose to nearly $120 a barrel, crossing $100 per barrel for the first time since Russia's invasion of Ukraine in 2022.

On March 9, the Ministry of Petroleum and Natural Gas issued an order directing all domestic oil refining companies, including petrochemical complexes, to maximise the production of LPG and make the entire output available exclusively to IOCL, HPCL and BPCL. Refiners have been barred from diverting any output for other petrochemical production. The OMCs have been directed to supply LPG solely to domestic consumers.

This comes just a month after the Union Budget cut LPG subsidy allocation by 27%, from ₹15,121 crore to ₹11,085 crore. The Ministry of Petroleum and Natural Gas received ₹30,443 crore for 2026-27.

India produces only about 40% of its LPG requirement. The rest is imported, overwhelmingly from the same region now at war.

Increase in LPG use

India's LPG use has been on the rise as more people switch to cleaner cooking fuel **(Chart 1)**. Between 2015 and July 2025, the number of active domestic LPG consumers rose from 1,486 lakh to 3,305 lakh, an increase of over 120% in a decade, according to data from the Petroleum Planning and Analysis Cell (PPAC), Ministry of Petroleum and Natural Gas. The government has claimed that LPG coverage has increased to nearly 100% of households, up from 62% in 2016 when the Pradhan Mantri Ujjwala Yojana was launched.

The International Energy Agency, in its Indian Oil Market Outlook to 2030, noted that clean cooking programmes had led to LPG imports surging nearly three-fold in the past decade. The quantity of India's LPG imports increased from over 16.48 million metric tonnes (MMT) in 2020-21 to over 18 MMT in 2025-26. **(Chart 2)**

India's LPG imports are heavily concentrated in a few countries, most of them in West Asia **(Chart 3)**. In 2025, Qatar accounted for about 34% of India's LPG imports, making it the country's largest supplier, followed by the UAE (26%), and Kuwait (8.3%). This dependence on West Asia has been long-standing. In 2020, nearly 37% of all Indian LPG imports came from Qatar. Moreover, the Strait of Hormuz, located between Iran and Oman, is one of the world's critical energy shipping routes. A large share of global oil and gas shipments pass through this narrow waterway. With the Strait of Hormuz closed since March 1, LPG imports have been hit.

India's Liquefied Natural Gas (LNG) imports have also been increasing in 2024-25, reaching 27 MMT, the highest on record and double the 13.5 MMT imported in 2011-12 **(Chart 4)**. Half of India's LNG also comes from Qatar. LNG powers fertilizer plants, electricity generation, and gas pipelines that fuel vehicles and commercial kitchens. Like LPG, it is largely sourced from the same West Asian suppliers caught in the conflict.

Supply strain

The data for the charts were sourced from Petroleum Planning & Analysis Cell (Ministry of Petroleum and Natural Gas), and UN Comtrade

CHART 1: Number of active domestic LPG consumers in India (in lakhs)

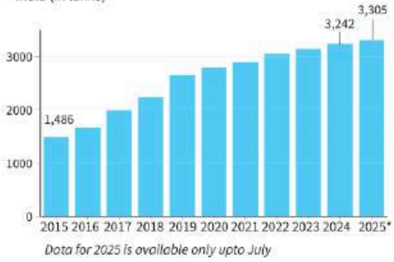


CHART 4: The total import of liquified natural gas (in million metric tonnes)

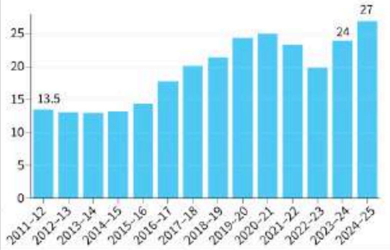


CHART 2: The total import of liquified petroleum gas (in million metric tonnes)

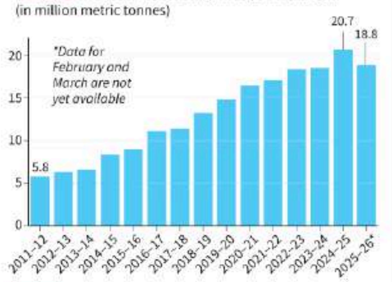


CHART 5: The domestic consumption of liquefied petroleum gas (in million metric tonnes)

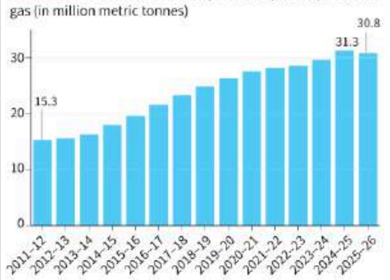
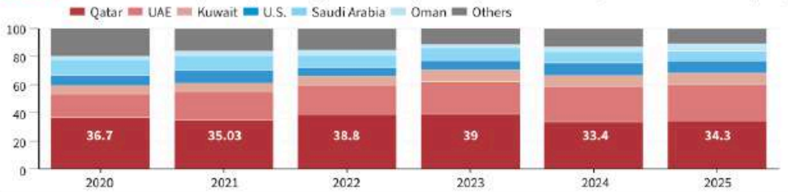


CHART 3: The share of India's imports of petroleum gases and other gaseous hydrocarbons from top six countries and others (in %)



Free Press Journal, Mumbai, 12/03/2026
Page No: 17, Size: 28.44cm × 18.26cm

Iran War triggers LPG crisis ; restaurants, street food stalls in Gujarat begin shutting down

FPJ News Service
AHMEDABAD

The ripple effects of the ongoing US-Israel conflict with Iran have begun to disrupt everyday life in Gujarat, with a sudden shortage of commercial LPG cylinders pushing thousands of small restaurants and street food vendors toward closure. The crisis has intensified overnight as supply disruptions hit eateries that rely heavily on LPG cylinders rather than piped natural gas (PNG).

According to the Gujarat Hotel and Restaurant Association, restaurants without PNG connections are facing severe operational challenges as the supply of commercial cylinders has reportedly been disrupted across several cities.

Hotel association leaders say the situation could worsen in the coming days if supplies are not restored quickly.

Narendra Somani, President of the Gujarat Hotel and Restaurant Association, said small eateries are already being forced to shut down.

"Nearly 70 to 80 percent of hotels in Gujarat run on gas pipelines, but about 20 to 30 percent depend on commercial LPG cylinders. Right now, the supply of cylinders has stopped in several places. Small restaurants and roadside food stalls that rely on these cylinders have started closing," Somani said.

The impact is already visible across cities where gas agencies are witnessing long queues of people trying to secure cylinders. Many restaurants had booked gas cylinders online in advance, but the sudden supply disruption has left them scrambling.

Ajitbhai Patel, a Surat-based gas distributor and proprietor of AR Contractors, said the crisis is linked to global supply disruptions caused by the war.

"The war situation has affected gas production and the company has temporarily stopped the supply of commercial cylinders. At this stage, no one can predict when the shortage will end because it depends on how long the conflict continues," Patel said.

Reliance to fund oil refinery in US; Trump calls it 'historic $300bn deal'

Construction Likely To Start In Q2 This Year

Reeba.Zachariah
@timesofindia.com

Mumbai: Reliance Industries (RIL) will bankroll the first new oil refinery project in the US in 50 years, marking one of its biggest overseas bets and a return to the American energy market after four years.

EDIT PAGE: **America's RIL Deal, India's Real Deal**
▶Trump's billionaire diplomacy for oil tech, P 14

America First Refining (AFR), the startup developing the refinery at the Brownsville port in Texas, said it received a "nine-figure investment from a global supermajor at a 10-figure valuation" in Feb but did not name the investor. "For the first time in half a century, the US will build a new refinery designed specifically for American shale oil," said AFR chairman & founder John Calce.

US President Donald Trump, announcing the refinery project on his social media platform Truth Social, named RIL as the investor and called the investment by India's largest privately held energy company "tremendous".

This announcement comes after RIL exited the upstream oil and shale gas business in the US in 2021.

Construction of the 168,000-barrels-per-day shale oil refinery is expected to begin in the second quarter of this year.

▶Opportunity for co, P 18

TEXAS PROJECT FOR SHALE OIL

➤ Refinery's developer America First Refining said it had **'received a 9-figure investment from a global supermajor at a 10-figure valuation'** in Feb, without naming RIL

➤ Project expected to **offset $300 billion in the US-India trade deficit** through a 20-year product offtake agreement with RIL

➤ Industry experts say the investment could deepen India-US economic cooperation, expand RIL's international presence and potentially **open future moves into fuel distribution and retail in North America**

THIS IS A HISTORIC $300 BILLION DEAL — THE BIGGEST IN US HISTORY... Thank you to our partners in India, and their largest privately held Energy Company, Reliance, for this tremendous Investment'

—Donald Trump

'Opportunity for Indian co to enter US refining ecosystem'

▶ From P 1

AFR also said the "same global supermajor" had signed a 20-year agreement to purchase the refinery's output.

The project is also expected to help narrow India's trade surplus with the US, an issue that has long been a point of concern for Trump. "This is a historic $300 billion deal, the biggest in US history," read Trump's post on Truth Social.

According to AFR, the figure reflects the long-term offtake arrangement under which the global supermajor will purchase 1.2 billion barrels of shale oil valued at $125 billion and 50 billion gallons of refined petroleum products such as gasoline, diesel and jet fuel worth about $175 billion. Combined, the transactions are expected to improve the US trade balance by $300 billion, it said.

Analysts noted that the actual equity investment in the refinery itself has been described as a "nine-figure" sum, implying several hundred million dollars, while the project valuation is in the "ten-figure" range, indicating that the capital commitment is likely to remain below $1 billion.

The Texas refinery will mark RIL's second greenfield investment outside India. In 2021, the company announced a partnership with Abu Dhabi National Oil Company (ADNOC) to build a $2 billion petrochemicals plant in the UAE.

The Texas refinery will mark RIL's second greenfield investment outside India

Industry experts say the project could deepen economic cooperation between India and the US. M S Banani, joint managing director of Axiom Gas Engineering, a fuel station developer, said Texas is one of the world's most important energy hubs, hosting major companies such as ExxonMobil, Chevron, Shell and BP.

"Establishing a refinery there provides direct access to crude supply and one of the largest fuel markets globally," Banani said. "RIL has extensive experience in processing heavy and sour crude at its Jamnagar refinery complex, which gives it a strong technical advantage in refining diverse crude grades, including those available from regions such as Venezuela."

From a business perspective, the investment represents an opportunity for an Indian company to enter the American refining ecosystem and potentially expand into fuel distribution and retail in the future, Banani added.

"It reflects both the growing global presence of Indian industry and the strengthening strategic partnership between India and the US."

The development coincides with volatility in global oil prices driven by the intensifying conflict in West Asia. However, the announcement had little impact on RIL's shares. At close of trading, the stock was down 1.3% at Rs 1,391 on the BSE. RIL did not comment on the announcement.

Free Press Journal, Mumbai, 12/03/2026

Page No: 19, Size: 28.47cm × 36.86cm

LPG crisis chokes food industry

IN BHOPAL, 7,000 stalls may shut in 48 hrs; Food prices up to 20%

Our Staff Reporter
BHOPAL

A severe shortage of commercial LPG cylinders has pushed Bhopal's food industry into crisis, forcing nearly 7,000 food stalls, carts, kiosks and small eateries to prepare for a shutdown within the next 48 hours.

The disruption has affected the entire food chain—from street vendors and tiffin services to restaurants and hotels—with businesses struggling to manage daily cooking operations.

According to traders and vendors, nearly 50 per cent of restaurants are planning to suspend online food delivery services, as the LPG supply crunch has made large-scale food preparation difficult.

Meanwhile, gas distributors clarified that domestic LPG supply remains normal, urging residents not to panic or make unnecessary bookings. Officials assured that household cylinder deliveries will continue as scheduled.

No. 6 food hawkers' zone turns silent

The zone, which usually attracts over 2,000 visitors daily, nearly 80% of stalls were shut by Wednesday evening. Tony, who runs a Chinese fast-food stall, said Wednesday could be his last working day as 19-kg commercial LPG cylinders have risen from about Rs1,500 to nearly Rs3,000 in the black market.

Tiffin centres, small eateries hit

Small eateries and tiffin centres, especially in Nehru Nagar, have been badly hit by the LPG shortage. Mangalm Restaurant owner Prabhat Soni said operations have nearly stopped as supplies ended. Tiffin services for students and migrant workers have been disrupted, while vendors in New Market have temporarily shut stalls due to lack of cylinders

Rumours fuel panic buying

Rumours of a domestic LPG shortage triggered panic buying despite officials assuring adequate supply. Long queues formed outside gas agencies on Wednesday. Operator RK Gupta said bookings have risen two to three times above normal levels as residents rushed to secure refills instead of waiting for home delivery.

Commercial cylinder ban disrupts 2,400 events

Caterers forced to buy domestic cylinders in black; Collector advises shift to PNG

Utsav Gupta
BHOPAL

More than 2,400 wedding and social functions scheduled in Bhopal over the next 15 days are likely to be affected after the administration imposed a temporary ban on commercial LPG cylinders.

The decision has triggered strong opposition from caterers, who say the restriction has come during the peak wedding season, creating serious challenges for large-scale food preparation.

The Madhya Pradesh Catering and Tent Association has strongly objected to the move, stating that it will severely impact catering services across the city.

Association convener Rambabu Sharma said nearly 1,500 weddings are scheduled in Bhopal by March 14, and the ban on commercial cylinders has made it extremely difficult for caterers to manage cooking arrangements.

He said catering services should be treated as essential, as they involve preparing food for hundreds of guests at weddings and other large events where uninterrupted cooking facilities are necessary.

Sharma added that if no immediate alternative is available, caterers should be temporarily allowed to use domestic LPG cylinders during the wedding season.

Caterers face losses, rising costs

Several catering operators said they are already facing financial losses due to the sudden restriction.

One caterer said they are being forced to buy domestic LPG cylinders in the black market for around Rs 1,000 each to complete previously booked events. However, this arrangement is enough for only two or three functions.

Aneesh Ansari, owner of Golden Tent House and Catering Services, said many bookings were made earlier at around Rs 2,000 per plate, but the rising fuel cost has made it difficult to maintain those rates.

Manohar Sharma, another caterer, said a function with around 500 guests requires at least eight commercial LPG cylinders. Due to the shortage, some caterers have even requested clients to reduce the number of guests.

Free Press Journal, Mumbai, 12/03/2026
Page No: 19, Size: 35.61cm × 32.83cm

SUPPLY CONCERNS | **Admin maintains LPG availability in city adequate**

Gas agencies see long queues, tempers flare over LPG delay

Consumers struggle with bookings even as administration denies LPG shortage

Our Staff Reporter
BHOPAL

Long queue outside a GTB-based gas agency as people wait to get LPG cylinders on Wednesday

Even as the district administration insists there is no shortage of LPG cylinders in the city, many consumers continue to face difficulties in booking and obtaining refills, leading to long queues and arguments at several gas agencies. Officials said cylinders are available in adequate numbers and are being supplied through the regular booking system. The administration has also urged consumers not to pay attention to rumours about a shortage.

On the ground, however, panic appears widespread, with people gathering outside gas agency offices to secure cylinders.

At a gas agency near Jawahar Chowk on Wednesday afternoon, several consumers argued with staff over delay in supply. Many complained that despite booking cylinder days earlier, they had not received delivery.

- **Consumers complain of refill delays despite prior online booking**
- **Agency staff cite server issues affecting booking system**
- **Residents urge quicker resolution as arguments break out at agencies**

Residents argue with gas agency employees at LPG distributor in Jawahar Chowk on Wednesday

One consumer, Kishor, alleged he had booked his LPG cylinder online days ago. When told the cylinder had already been issued, he questioned how it could have been given to someone else despite his prior booking, leading to an argument with agency staff.

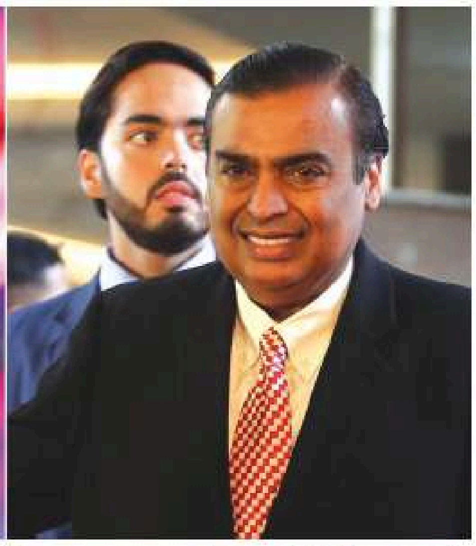
Agency employees said online booking was facing issues due to server problems, affecting the process. A similar situation was seen outside Bharat Gas agency in TT Nagar, where consumers had been visiting for several days to secure refills.

Saroj Thorat, an elderly resident of Shastri Nagar, alleged she was unable to book a cylinder and that calls to the booking helpline were not connecting.

Similar scenes have been reported at several other gas agency offices across the city, with consumers lining up since morning and occasional arguments with staff.

Reliance to partner in first new US oil refinery project in 50 years

ASHOKE RAJ ■ New Delhi



Billionaire industrialist Mukesh Ambani's Reliance Industries is set to participate in the development of what could become the first major new oil refinery built in the United States in nearly five decades. The announcement was made by US. President Donald Trump, who described the project as the "largest refinery deal in US history."

The refinery is planned at the Port of in Brownsville, Texas, and will be designed to process light crude derived entirely from US shale oil. The project is being led by energy developer America First Refining (AFR), which confirmed that a global energy major has committed significant investment and entered into a long-term commercial agreement tied to the facility's output.

Although AFR did not name its partner directly, President Trump identified Reliance Industries in a post on the social media platform Truth Social, calling the arrangement a "historic $300 billion deal." Reliance has not yet issued an official statement regarding the announcement. Groundbreaking for the refinery is expected to take place in the second quarter of 2026. Industry analysts estimate the project could require capital expenditure of roughly $4 – 5 billion, though official financial details and completion timelines have not been disclosed.

The facility will be engineered to run entirely on American light shale crude, reflecting the shift in US energy production over the past decade. According to AFR, a binding 20-year offtake agreement has been signed with the international partner, committing it to purchase and distribute fuels produced at the refinery.

The agreement includes the purchase and processing of approximately 1.2 billion barrels of US shale oil — valued at about $125 billion — over the contract period. AFR also plans to produce roughly 50 billion gallons of refined petroleum products worth an estimated $175 billion.

In total, the project is projected to contribute about $300 billion toward reducing the US trade deficit through domestic energy production and exports.

If completed, the Brownsville refinery would become the first major US refining facility built from scratch since the Garyville refinery in Louisiana developed by Marathon Petroleum began operations in 1977.

President Trump highlighted the economic and strategic impact of the project, stating that the refinery would strengthen US energy security, increase domestic fuel production, and generate significant economic activity in South Texas.

The project site was originally proposed by Element Fuels, which completed site preparation and permitting work in 2024 for a hydrogen-powered refinery complex capable of processing around 160,000 barrels of crude per day. John Calce, founder and chief executive of Element Fuels, now leads America First Refining.

For Reliance Industries, the project would represent its first refinery investment in the United States. The Indian conglomerate currently operates the world's largest refining complex in Jamnagar, with a processing capacity of about 1.24 million barrels of crude oil per day.

Reliance already maintains a strong commercial presence in the US through energy trading, crude sourcing, and technology partnerships. The company has previously invested in US shale gas assets and continues to market refined fuels in the American market.

Its broader ties with the US corporate sector have also deepened in recent years. Technology giants Meta Platforms and Google have invested in Jio Platforms, while private equity firm General Atlantic holds a stake in Reliance Retail Ventures.

The refinery announcement comes at a time of heightened volatility in global oil markets amid escalating geopolitical tensions, including the ongoing conflict involving Israel and Iran. Policymakers in Washington are exploring measures to stabilise energy prices and boost domestic supply.

According to the US Energy Information Administration, the United States currently operates about 132 oil refineries with a combined processing capacity of roughly 18.4 million barrels per day. Most of these facilities were built decades ago and are configured to handle heavier crude imports, particularly from countries such as Venezuela and Canada, rather than the lighter crude produced from US shale formations.

The proposed Brownsville refinery is expected to address this imbalance by focusing specifically on processing domestically produced shale oil, aligning refining infrastructure more closely with the evolving profile of American crude production.

Times of India, Delhi, 12/03/2026
Page No: 2, Size: 34.87cm × 30.67cm

Some restaurants suspend operations, others may follow; PNG supply also hit

TIMES NEWS NETWORK

New Delhi: The ripple effects of the disruption in LPG supply owing to the war in West Asia have begun to impact Delhi's restaurant sector, with at least 12 eateries shutting operations on Wednesday, citing a scarcity of commercial LPG cylinders.

Restaurant owners say the limited stock available over the past few days has begun to dry up, forcing these establishments to temporarily suspend operations. "Cylinders are not available even in the grey market," said Anurag Katriar, founder of Indigo Hospitality.

He said he had been coordinating with the owners of these restaurants. "They will take a day or two and come up with different arrangements — like moving to induction-based cooking if they are able to — before reopening," he said.

Hoteliers have also expressed concern that even PNG, which had kept Delhi in a slightly better position compared to other cities, is now facing constraints. "IGL, which supplies PNG, has issued an advisory of a 20% cut in supply, so a major number of restaurants may be forced to shut down," said Amit Bagga, co-founder of Daryaganj Hospitality.

"Supplies to all industrial and commercial customers are being restricted to 80% of their average consumption for the last six months with effect from 6am on 11th March," a communication by Ambience mall in Vasant Kunj, quoting IGL advisory, read.

"It is recommended that outlets keep electrical cooking appliances as a backup to ensure continuity of operations in case of any temporary interruption in supply of PNG," it told its tenants.

Officials at IGL said the advisory was issued according to govt notification to ensure supply to priority sectors.

Meher Tandon, owner of Kashmir Chur Chur Naan, a restaurant in Paharganj that has shut shop, told **TOI**: "We had supply only for today. From tomorrow, we won't be able to open because we currently have zero stock and zero supply, with no backup."

IANS

Owner of a closed restaurant said they usually required four cylinders a day, but they had been managing with just one over the past few days

Tandon said his restaurant typically requires three to four cylinders a day, but over the past few days had been managing with just one cylinder.

Industry representatives said the crisis could have wider implications if supplies are not restored soon.

"Many restaurants have moved to truncated menus around the country. Others may be completely out of LPG by the weekend. Supplies are dwindling and depleting rapidly," said Zorawar Kalra, vice-president of NRAI, which represents over 5 lakh restaurants in India.

"We urge govt to recognise the restaurant industry as an essential service and ensure priority access to commercial LPG cylinders for restaurants and cloud kitchens," he said.

The lawyers' canteen at Delhi High Court was also impacted on Wednesday. It was forced to discontinue its 'main course' menu owing to the unavailability of cooking gas in its kitchen. However, services resumed shortly after the LPG supply was secured for the day, according to the management.

Pioneer, Delhi, 12/03/2026
Page No: 11, Size: 8.92cm × 15.56cm

Indian fuel retailers face margin pressure

PRESS TRUST OF INDIA
New Delhi

India's State-owned oil marketing companies — Indian Oil Corporation Limited, Bharat Petroleum Corporation Limited, and Hindustan Petroleum Corporation Limited — are under pressure from rising global crude and gas prices, limited domestic fuel price pass-through, and dependence on imported energy, global rating agencies said.

India imports 88 per cent of its crude and nearly half its natural gas, with 30-55 per cent of supplies passing through the Strait of Hormuz. Strategic petroleum reserves cover just 10 days of consumption, while commercial stocks provide around 65 days, leaving OMCs exposed to supply disruptions.

S&P Global Ratings, Moody's Investors Service, and Fitch Ratings, in separate notes, detailed the impact of the widening West Asia conflict, triggered by the US and Israel launching attacks on Iran and Tehran retaliating.

Fitch said a prolonged Iran-related oil or LNG supply shock could pressure near-term credit metrics, although Government backing provides strong support.

Retail fuel prices in India have largely remained unchanged since April 2022, reflecting Government influence and OMCs' dominant market share of nearly 90 per cent of fuel outlets.

Pioneer, Delhi, 12/03/2026

Page No: 10, Size: 26.78cm × 22.09cm

First for US & RIL in 50 years

Is the US refinery RIL's best chance to expand its global footprint?

When the late patriarch Dhirubhai Ambani started his Indian operations as a textile trader in the 1960s, he never imagined that Reliance Industries Ltd (RIL) would construct the largest grassroot refinery. Despite the apocryphal stories that he wanted an oil empire as big as that of British Petroleum, he never thought that RIL would build a mega refinery in the US, the first in the past half-a-century. Well, even the second dream, which was once hazy and nebulous, will soon turn into reality over the next few years, if everything goes according to the plans concocted by the US president, Donald Trump.

Without hints from RIL, or speculation in Indian media, Trump unleashed an oil bombshell, unlike the attacks on Iran's oil assets, and Iran's counter on oil targets in the Middle East. "This is a historic $300 billion deal, the biggest in US history," he announced in a social media post. He thanked RIL, India's largest privately-held firm, "for this tremendous investment." The new port refinery will be in Texas, and the US president claimed that it will "strengthen our national security, boost American energy production, deliver billions of dollars in economic impact, and will be the cleanest refinery in the world."

It will be the first refinery in the US in 50 years. Media reports indicate that it will use American shale oil, and will be co-developed between RIL and American First Refining. In a statement, the American firm stated that it received a "9-figure investment from a global supermajor at a 10-figure valuation." It added that the supermajor, now revealed as RIL, has inked a 20-year-deal to "purchase, process, and distribute shale oil sourced and produced stateside." The refinery will process 1.2 billion barrels of US light shale oil, valued at $125 billion, and produce 50 billion gallons of refined products worth $175 billion.

According to the executives of American First Refining, America has a surplus of light shale oil, apart from prominent shale gas sources, but there is a shortage of refining capacity. The Reliance investment will correct this input-output mismatch. Hence, the new mega refinery will strengthen the domestic petro product supply chain. Over the past decade or so, refining capacity globally has undergone a shift.

Expansions were witnessed in Asia and the Middle East, even as capacities contracted or stagnated in North America and Europe. Over the past two decades, refining capacity was up 15 per cent despite a decrease in the absolute number of refineries since 2011.

Hence, the announcement of a mega refinery in the US is a major one. As Trump admitted, this is the first such deal in 50 years.

One is not sure how the demand-supply arithmetic will work. There is availability of fuel, this is for sure. There is a demand for the refinery products, this too is sure. But does the US need a large refinery for local demand? Or will the mega refinery look at exports and local sales? These are some of the questions that have rattled the experts, even the investors.

What is more important is that Reliance's experience with American shale oil and gas is not a happy one. According to AI-driven search, "RIL exited its US shale gas projects between 2017 and 2021 primarily due to sustained low oil and gas prices, which led to poor financial returns, negative equity, and asset devaluation. The projects, acquired between 2010 and 2013 became economically unviable, prompting RIL to divest its Marcellus and Eagle Ford shale assets...." The sales were at lower valuations compared to the purchase prices. RIL decided to shift to high-growth Indian areas, and exit volatile foreign assets.

According to a media report, "A fall in (oil and gas) price affects shale gas business more than traditional oil and gas as shale assets are economically viable only if crude prices remain at a certain threshold." Generally, the threshold keeps changing depending on the shale assets, and their complexity. Obviously, at nearly $90, although it is down from $120, the global crude prices are quite attractive to explore all kinds of shale oil and gas assets across America. At a price measure, this is the opportune time to enter the refining business based on shale oil.

But as the past experiences prove, and as RIL's experiences in the US show, the scenario can change rapidly. What seems lucrative and attractive can become worthless within no time. This mostly happens to non-crude energy assets such as gas and shale-based sources. If the Iran war ends, and crude prices plummet, the whole refinery's financials and commercials can go for a spin. For RIL to invest in a $300-billion refinery, and that too based on shale oil, is fraught with risks. These risks raise their heads quite quickly. But then, RIL has managed one of the largest refineries at Jamnagar, and an export-oriented one.

Hence, it understands the dynamics of the oil and refinery products businesses. Over the past few years, despite the volatility in both crude and petroproducts prices, the financials of the Jamnagar refinery were stable and consistent. There were profit fluctuations but not wild ones. There was always something that saved RIL. If crude went up, somehow some other margins improved to bolster and support the profits. Hence, this game of rising and falling input prices is something that RIL has played, and won in most years. Doing this in India is easier than doing it in the US, as the shale gas assets sell-off shows.

Investors are not sure of the American mega refinery proposal. After a spike in prices in the first hour of yesterday's trading, the stock came down. It ended the day more than 1.5 per cent lower. Maybe after the initial enthusiasm of such a big and unexpected news, and that too from the social post of Trump, numbed the investors into undue excitement and enthusiasm. Possibly, the realisation stuck later. A refinery in the US, which is based on shale oil, has different dynamics and economics compared to an export-oriented refinery in India.

Trump remains upbeat about the refinery, as he is with everything, even if it means nothing. It credited the proposal to "America First Agenda, streamlining Permits, and lowering Taxes that have attracted billions of dollars in deals." He said that the mega project will generate thousands of jobs in Texas, and bring "long-awaited economic development. It will power global exports, and bring... jobs and growth to a region that deserves it," Trump said in a social media post.

Times of India, Delhi, 12/03/2026

Page No: 10, Size: 17.07cm × 47.92cm

Gor: India's oil buy helped maintain price stability

Times News Network

New Delhi: US ambassador **Sergio Gor** lauded India's role in maintaining stable oil prices around the world, saying Washington recognises

ongoing purchases of Russian oil by the Indian govt are a part of this effort. The remarks by the ambassador follows the US's decision last week, in the middle of the war in West Asia and the mounting threat to global energy supplies, to allow India a 30-day waiver to purchase Russian oil already at sea.

The North American ambassador said on X that India had been a great partner in maintaining stable oil prices around the world.

"The US recognises ongoing purchases of Russian oil are a part of this effort. India is one of the largest consumers and refiners of oil and it is essential for the US and India to work hand in hand for market stability for Americans and Indians," said the ambassador.

The Biden administration had allowed India to purchase Russian oil, saying this procurement at a price cap prevented oil prices from going up. However, the US under President Donald Trump imposed an additional 25% tariff on India for buying Russian crude, accusing New Delhi of bankrolling Russia's war on Ukraine.

The White House said on Tuesday that it reached the decision to allow India to "accept" Russian oil already on ships, as allies in India were "good actors".

Scott Bessent, treasury secretary, said this would lessen pressure caused by conflict in West Asia.

India pumps up Russia oil purchases by 45% in March

New Delhi: India's oil purchases from Russia have increased by nearly 45% in March, rising from around 1 million barrels a day (mbd) in Feb to 1.5 mbd in the first 11 days of the month, reports **Atul Mathur**.

With transit through the Strait of Hormuz disrupted since the beginning of the conflict 12 days ago, supplies from oil-rich West Asian countries have fallen drastically compared with the flows in Feb. In the first 11 days of March, India received 0.6 mbd from Iraq, 0.4 mbd from Saudi Arabia and 0.1 mbd from the UAE.

Saudi Arabia was the second-largest supplier of crude, behind Russia, in Feb, with daily supplies of a little over 1 million barrels. Iraq also delivered nearly 1 mbd to India last month, while the UAE supplied 0.6 mbd.

India imported nearly 5.2 mbd of crude in Feb, which has come down to 4.5 mbd in March. Energy analysts said the number of cargoes is likely to go down further as most vessels delivering supplies this month had departed before the conflict.

Sumit Ritolia, lead analyst at Kpler, said with the US allowing flexibility to continue purchasing Russian barrels, trade flows have picked up, enabling India to import volumes well above earlier baseline levels. "Market tracking also indicates a substantial amount of Russian crude cargoes are currently on the water," Ritolia said.

Times of India, Delhi, 12/03/2026
Page No: 16, Size: 22.52cm × 39.42cm

On All Cylinders

Stopping LPG black market requires commercial supply restoration, market pricing, distributor audits

Officially, there's no shortage of LPG. Anecdotally, cylinders are selling for twice the official price. That means we have a black market in gas now. This is not surprising when LPG supply to commercial kitchens has been curbed. There's logic behind govt's order: until Strait of Hormuz reopens, or enough new suppliers are found, India's gas stock must meet essential needs first. But as we said yesterday, commercial kitchens are just as "essential" as home kitchens now. They employ lakhs and feed crores daily. If they can't get gas legally, other means will arise. Gas meant for homes will get diverted – illegally – creating problems all round.

Administrators should know this. As a nation, we grew up on shortages and black markets of all types. In 1970s, parents booked LPG connections for daughters at birth, and Bajaj scooters too. Because delivery took years. Rice, sugar, kerosene, cooking oil, everything was rationed till 1990s, and rations were sold at open market prices. That was common knowledge. Why do we have a 1970s situation in 2026? Supply shock is only half the answer. The bigger reason is disruption of free market. There's a reduced stock of gas, and a large, desperate commercial sector that can't get any. Ergo, black market.

A cold-hearted economist would let gas find its right price. But govt can't be cold-hearted. It can't ask poor domestic consumers to pay ₹400 or ₹500 more per refill. The market is less squeamish. It sees a gap, and demands a "scarcity premium". But this is risky work. Gas distributors and their agents face stiff penalties, if caught. So they demand a "risk premium" as well. Effectively, LPG ends up costing more in the black market than it would in the "white market", if govt let demand and supply determine price.

Irony is, the harder govt cracks down, the higher black market's risk premium will shoot. But if it doesn't crack down, it risks normalising the black market itself. So, here's what it must do. One, increase LPG production and purchase. Two, bite the bullet on gas price. It's not diesel, and won't stoke inflation the same way. Three, audit distributors and ask marketing firms to start online dashboards showing real-time stock at the gas agency level. Transparency is the best fix for anything black. Higher prices may be politically unpalatable, but at least the money will flow to PSU companies, who can buy more gas with it. It's a better outcome than enriching middlemen.

Times of India, Delhi, 12/03/2026
Page No: 16, Size: 46.88cm × 39.56cm

America's RIL Deal, India's Real Deal

The project is geopolitical leverage for New Delhi. It fits into GOI's smart transactional approach: invest in US, buy Russian oil, clear Chinese FDI, talk to Iran, be pals with Israel. Be guided by ROI, not emotion

Somnath Mukherjee

"Buy when there's blood in the streets, even if the blood is your own." That gem is credited to Baron Nathan Rothschild, a member of the legendary, eponymous banking family. And that wasn't just a smart quip. He lived by it. The Baron invested while the Battle of Waterloo was raging. He profited handsomely after the war. Nor is Waterloo a unique case in history.

Geopolitical upheavals have invariably thrown up economic winners (and losers). WW2, the most devastating geopolitical event known to mankind, allowed US to overcome a biting depression, and emerge as the pre-eminent world power. It also allowed USSR to recover very quickly, from the extensive destruction it suffered, and emerge as a peer-competitor to US. The ensuing Cold War threw up several winners – most of East Asia as economic powers, and finally emergence of China, as a near-peer geopolitical rival to US.

As the world adjusts, somewhat violently at times, to a new geopolitical construct, there is literally blood in the streets (and some, though not yet a massive amount, in the markets). While India confronts, and adjusts to, day-to-day emergencies thrown up by moment, it is important we remain alive to opportunities such upheavals invariably throw up.

It's early days yet, and social media chatter threatens to overwhelm reasoned narratives these days, but it looks as if India is playing the new "great game", with a certain level of aplomb.

Yesterday, Trump took to Truth Social to announce a large petroleum refinery, the first greenfield refinery in US in 50 years, with a $300bn investment by Reliance Industries. While actual scale and timelines of such projects are hidden below political headlines, it's an interesting development.

Details are scanty yet. But, at a proforma level, it seems like a win-win. RIL runs perhaps the world's most complex refinery operation, with its Jamnagar refinery complex possessing a Nelson Complexity Index (NCI) of over 21. Such high NCI reflects the ability to process heavy sour crude (of the sort found in Venezuela, among other places).

This is an operation Reliance has perfected over decades, and it's precisely the skillset that US is missing (all of US refining operations are today predicated on refining light sweet crude). Such a project helps US build critical supply capabilities, precisely in an area most under disruption today, due to the war in Persian Gulf.

For India, such an investment, by an Indian company, builds the reciprocity quotient so embedded in Trumpian deal-making. A large Indian-owned refinery in America creates some "tariff insurance" today, while continuing to yield geopolitical leverage long after Trump is gone.

Image: AI

Yes, RIL is a private enterprise. But, globally, large private corporations are often considered to be an extension of the state. There's likely to have been enough back-channel official nudges and encouragement, given the deal's size and importance.

This isn't a one-off. The Trump-RIL announcement is part of a series of similarly interesting GOI decisions, taken in recent weeks. On Tuesday, rules for FDI originating from China were changed. Reversing a decision taken in 2020, in the aftermath of Galwan, these revised rules make it easier for Chinese companies to invest in India.

This is expected to ease the flow of technology and capital from China. Technology has become a bottleneck for many Indian companies, setting up new manufacturing capacity. Because global manufacturing supply chains are predominantly centred around China.

Last week, the media made much out of US carving out a "30-day sanction waiver" for India's Russian oil imports. But data tells a different story. India had imported over 20% of its monthly crude from Russia in Feb, before any US 'waiver'. India had, earlier, continued to buy discounted Russian oil, for as long as it was economically feasible, before effecting a partial scale-back, to facilitate a trade agreement with America.

Go back slightly earlier. On Jan 19, the entire UAE royal family was in Delhi, on a state visit. Modi was in Israel on a state visit on Feb 25. Iran's junior foreign minister was hosted in New Delhi, during the semi-official Raisina Dialogue. Three Iranian naval ships caught out in Indian Ocean were offered refuge (one, unfortunately, didn't make it to a port on time, but the other two did). All of these are illustrative, of an approach different to traditional policy. That's why GOI has refrained, so far, from issuing moral judgements on the Iran conflict.

India's keeping lines open with all sides. Choosing to tilt, when a side seems to be the winner, choosing not to speak out loudly, when self-interests are not at play. India's guiding principle is, judge the transaction on offer. Don't go by some abstract philosophy, or *friendship*, or a greater principle.

This is a classic financial trader's strategy, applied to statecraft – hedging where necessary, taking exposure where there is an opportunity, cutting losses quickly. Above all, diversifying aggressively, with no emotional commitment to any position.

This is elite level policymaking, in a disturbed world. Of course, that's not enough by itself. Hard power needs to be built up, and that requires different kinds of state interventions.

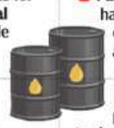
But, such smart statecraft is a necessary condition for India, if it wants to capture opportunities emerging out of global disruptions.

The writer is Chief Investment Officer of an asset and wealth management firm. Views are personal

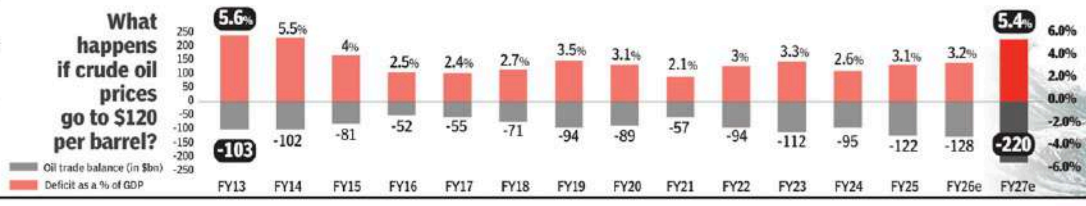
Costly Oil To Strain India's Economy

India imports most of its oil, so rising crude prices can quickly disturb the country's trade balance

- Petroleum **accounts for 25–30% of India's total imports**, making crude prices critical to the external balance
- Every $10 rise in crude **increases India's import bill by about $12–15bn annually**
- Past oil spikes have triggered **rupee depreciation, higher inflation and tighter liquidity**
- If oil averages **$120 per barrel, India's oil trade deficit could reach about $220bn**



What happens if crude oil prices go to $120 per barrel?



Source: DSP Netra report

Pioneer, Delhi, 12/03/2026
Page No: 3, Size: 21.64cm × 14.47cm

Restaurants staring at losses amid irregular LPG supply

PIONEER NEWS SERVICE
New Delhi

As irregular LPG supplies hit kitchens across Delhi, many restaurants are staring at losses, with some fearing temporary closure after being left with stock for only a day or two. As irregular LPG supplies grip kitchens across Delhi, many restaurants are left with stock for a day or two, fearing temporary closure and concerns over staff wages.

Industry representatives say many eateries in the capital are trying to manage the situation through adjustments. However, if the disruption continues, smaller establishments may struggle to handle rising costs without affecting staff wages.

With the widening West Asia conflict, the government has prioritised the allocation of domestically produced natural gas for LPG production, compressed natural gas (CNG) and piped cooking gas sectors.

Under the revised allocation, the requirements of these sectors will be fully met before being supplied to other industries, according to a gazette notification.

LPG cylinder delivery personnel prepare for distribution outside a gas agency in New Delhi PTI

Manpreet Singh, Honorary Treasurer of the National Restaurant Association of India (NRAI), said that many establishments in Delhi are not receiving regular LPG supplies, with several of them shifting to alternatives like piped natural gas and induction cooking.

He said restaurants are promoting dishes that require less gas or are cooking larger quantities using induction appliances.

If the situation continues, the rising costs will affect staff wages and employment, particularly in the unorganised sector. Restaurants may have to reduce the variety of food they offer and rely more on bulk cooking of certain dishes, Singh said.

Small restaurant owners say they are facing operational stress due to irregular supplies. The owner of Shahdara's Urban Kebab said their LPG stock has run out, and irregular supply is making daily kitchen operations difficult.

STUDENTS FORCED TO EAT OUTSIDE

New Delhi: Concern over LPG supply has come to haunt Capital residents and students alike, with many households turning to induction stoves, risking higher electricity bills, while students in rented accommodations are forced to increasingly rely on ordered meals as the widening West Asia conflict disrupts energy supplies.

Resident groups said the situation is fuelling panic among families who have limited LPG stock, with uncertainty over when they will get refills.

Atul Goyal, president of the United Residents of Joint Association (URJA), an umbrella body representing about 2,500 RWAs across Delhi, said several residents have approached the organisation complaining that they are unable to get LPG cylinders and are forced to rely on alternatives.

"There are people who are coming to us saying they are not getting gas cylinders anywhere and are forced to use induction stoves. But they are worried this will lead to a significant increase in electricity bills and are unsure how long they can continue like this," Goyal said.

The government has revised the priority order for allocating domestically-produced natural gas, placing LPG production, besides that of CNG and piped cooking gas, at the top.

BN Jha, president of the Mukherjee Nagar RWA, said the issue is particularly affecting students who live alone or in paying guest (PG) accommodations in the area, which has a large student population.

He said several students have reported that they are unable to get LPG refills and are therefore compelled to rely on outside food, increasing daily expenses. In some PG accommodations, the shortage has also reportedly led to a drop in meal services.

Tribune, Delhi, 12/03/2026

Page No: 1, Size: 22.33cm × 15.05cm

No fuel shortage in Delhi, clarifies govt

Urges residents not to pay attention to rumours

HARSH YADAV
TRIBUNE NEWS SERVICE

NEW DELHI, MARCH 11

The Delhi Government on Wednesday clarified that there is no shortage of LPG, petrol, diesel or PNG in the national capital and urged residents not to pay attention to rumours circulating about disruptions in fuel supply.

The clarification came after a key review meeting chaired by the Chief Secretary of Delhi, where senior officials from the Department of Food, Supplies and Consumer Affairs, Delhi Police, Revenue Department, Indraprastha Gas Limited and various oil marketing companies assessed the fuel supply situation in the city.

Officials reviewed rumours suggesting that LPG supplies could be disrupted due to war-like developments in the Middle East.

However, the authorities stated that the supply of petroleum products and gas in the Capital remains completely normal and that adequate stock is available.

Representatives from Indraprastha Gas Limited informed in the meeting that the Ministry of Petroleum and Natural Gas, Government of India, had issued an order on March 9, 2026, providing guidelines to ensure proper and equitable distribution and availability of domestic PNG and CNG in priority sectors.

Officials clarified that there is no shortage of domestic PNG in Delhi. After revising supply priorities, nearly 80 per cent uninterrupted gas supply had also been restored for industrial sectors.

Oil marketing companies also assured officials that petrol, diesel and domestic LPG supplies in Delhi remain normal and that companies currently have sufficient stock. The supply chain for oil and gas is continuing smoothly across the Capital.

Officials said though the LPG cylinder booking interval had been increased from 21 days to 25 days, consumers are still receiving cylinders at their homes within an average of two to three days after booking.

The meeting also noted that certain guidelines had been issued for the supply of commercial gas cylinders, under which educational institutions and hospitals are being given priority. Companies are continuing efforts to ensure smooth and uninterrupted supply of commercial gas cylinders.

Meanwhile, the government directed authorities to take strict action against any cases of gas theft or black marketing.

The Delhi Police and officials from the Revenue Department have been asked to remain vigilant and monitor the situation closely.

Reiterating that the supply of oil and gas in the Capital is running smoothly, the Delhi Government urged residents not to believe in rumours regarding LPG availability or engage in unnecessary panic or hoarding.

Govt orders strict checks to stop diversion of domestic LPG supply

Oil marketing firms to share daily stock position; toll-free helpline set up

TRIBUNE NEWS SERVICE

CHANDIGARH, MARCH 11

Amid a shortage of domestic LPG supply, the state government has directed all Deputy Commissioners (DCs) and Superintendents of Police (SPs) to ensure strict monitoring to prevent diversion of domestic LPG for non-household use.

District authorities have been asked to ensure that "there is no diversion of domestic LPG for other purposes and that double stocking and overcharging of rates do not take place under any circumstances."

The directions were issued after State Level Coordinator, Oil Industry, Haryana, Anil Kumar Singh, informed the Food and Supplies Department that the Ministry of Petroleum and Natural Gas had directed all Oil Marketing Companies (OMCs) to supply LPG only to domestic households.

Following these instructions, OMCs have implemented the directive, resulting in a curtailment of LPG supply for commercial purposes. This is expected to affect industries and eateries, which may have to shift to alternative fuels in the coming days.

A worker sorts LPG cylinders at a godown on Tuesday. PTI FILE

As per the orders issued by Additional Chief Secretary, Food, Civil Supplies and Consumer Affairs Department, Raja Sekhar Vundru, on March 11, OMCs will "furnish the daily position of LPG stock and supply to the district authorities" and officials will "keep a close watch on supply and distribution including the current stock position and retail prices."

Deputy Commissioners have been empowered to take action under the Essential Commodities Act and the LPG Regulation of Supply and Distribution Order, 2000, if required, to prevent artificial scarcity, hoarding and black marketing.

Officials have also been instructed to "prevent panic among consumers."

The directions were issued after Chief Minister Nayab Singh Saini was briefed on the ground situation earlier in the day.

District authorities will maintain close coordination with the District-level Coordinator of the Oil Industry to ensure adequate LPG stocks at gas agencies.

The government has also directed that educational institutions and hospitals must receive adequate supplies of LPG, PNG and other petroleum products.

Meanwhile, a nodal officer has been appointed and a toll-free helpline (1800-180-2087) has been set up at the Directorate of Food, Civil Supplies and Consumer Affairs for redressal of grievances related to LPG and other petroleum products.

Indian Express, Delhi, 12/03/2026
Page No: 15, Size: 19.21cm × 17.57cm

LPG production up by 25%, avoid panic booking: Govt

Sukalp Sharma
New Delhi, March 11

RECENT MEASURES taken by the government for maintaining continuous liquefied petroleum gas (LPG), or cooking gas, supplies to households amid the West Asia conflict have led to a 25% increase in domestic LPG production, and there was no need for panic booking of LPG cylinders by households, a senior Petroleum Ministry official said Wednesday.

Sujata Sharma, Joint Secretary in the Ministry of Petroleum and Natural Gas (MoPNG), said some panic booking and hoarding behaviour has been observed due to "misinformation".

She added that the normal LPG delivery cycle—two-and-a-half days from time of booking—is being maintained, and appealed to consumers to not rush-book cylinders.

The comments come amid growing concerns on cooking gas availability from different parts of the country.

Commercial entities are facing a shortage of LPG as the government has decided to prioritise household supplies of the fuel. There are also reports of black-marketing of LPG cylinders. The effective halt in maritime traffic through the Strait of Hormuz has significantly impacted India's LPG imports. The country depends on imports to meet around 60% of its LPG requirement, and 90% of the LPG imports come from West Asia through the Strait. This effectively means that roughly 55% of India's LPG consumption volumes are currently unavailable. Given the crisis, the government has invoked the Essential Commodities Act to prioritise LPG supplies to households over commercial and industrial consumers, ordered refiners to maximise LPG production, and directed them to divert propane, butane, and other streams from petrochemical production to LPG production.

India has over 33 crore domestic LPG consumers. This has led to some supply disruption in the commercial LPG segment—hotels and restaurants, for instance—and the MoPNG has formed a panel to consider requests from commercial consumers for LPG allocation. The minimum waiting period for booking a domestic LPG cylinder refill has been increased from 21 days to 25 days to prevent hoarding and creation of artificial scarcity in the market.

HT City, Delhi, 12/03/2026

Page No: 1, Size: 21.99cm × 48.10cm

Hindustan Times

PHOTO: ANI

How restaurants across India are coping with the LPG shortage

Deep Saxena and Aadrika Sominder

htcity@hindustantimes.com

The commercial food sector across India is grappling with the ripple effects of the US-Israel and Iran conflict. The ongoing crisis in the Gulf has pushed global oil prices higher and disrupted energy supply routes. This includes LPG cylinder shortages back home.

Small vendors and large restaurant chains alike are shifting to electric appliances and changing their menus.

At the Lawyers' Canteen in Delhi High Court, the menu will no longer feature main courses, as informed in a notice issued on March 11. "Other food items such as sandwiches, salads, fruit chaats and similar refreshments are available and will continue to be served," the notice states.

Varun Khera, head of the Noida chapter of the National Restaurant Association of India (NRAI), and owner of a restaurant in Delhi's Connaught Place says, "We've already ordered induction cooktops, deep-fat fryers, rice cookers, boilers, and steamers; whatever we can use as alternatives. Many people are also ordering combi ovens, but they cost around ₹2 to 3 lakh."

TURN TO →03

VARUN KHERA, HEAD, NOIDA CHAPTER, NRAI

We are trying to limit the menu and go electric... There is no availability of gas at any price in the black market. People are ready to pay ₹5,000 to ₹6,000, even ₹7,000 per cylinder, but there's nothing available.

DEBADITYA CHAUDHURY, MD, CHOWMAN CHAIN

Bengaluru and Mumbai are witnessing a noticeable supply gap. Chennai is beginning to show early signs of irregular supply. We may temporarily restrict a few menu items that require longer prep times such as momo and bao.

Most independent restaurants rely on LPG cylinders for cooking

PHOTO: PTI(FOR REPRESENTATIONAL PURPOSE ONLY)

Hindustan Times, Delhi, 12/03/2026

Page No: 4, Size: 37.07cm × 43.74cm

Hindustan Times

LPG crunch fuels black market, prices soar to ₹2.5k per cylinder

Snehil Sinha, Gargi Shukla, Aaditya Khatwani, Jignasa Sinha and Paras Singh

htreporters@hindustantimes.com

War reaches Delhi's kitchens

Supply bottlenecks and panic buying driving cooking gas prices

	RATE APPROVED BY GOVERNMENT	BLACK MARKET RATE
DOMESTIC CYLINDER	₹913	₹2,000 to ₹2,500
COMMERCIAL CYLINDER	₹1,883	₹3,000

"We had no LPG at home for two days. I asked my neighbours but they also didn't have... Finally, I managed to get one from a shop for ₹1,400. Usually we get it for ₹900."

—**Mouni**, a domestic worker living in Zamrudpur

"We managed to get one cylinder yesterday but only after paying ₹600 extra. Just 10 days ago I bought a cylinder for ₹1,900. Yesterday the same cylinder cost me ₹2,500."

—Street vendor in Nizamuddin

DEMAND RISES FOR INDUCTION STOVES

As households scramble for LPG alternatives, retailers told HT that demand has surged for induction cooktops, with stock disappearing from online platforms as well. At least three quick-delivery apps had cooktops out of stock, while electric cookers and rice cookers were also unavailable.

NEW DELHI: A cooking gas shortage triggered by the ongoing West Asia conflict has led to widespread panic buying and the emergence of a thriving black market for LPG cylinders across Delhi, with domestic cylinders being sold for as high as ₹2,000-₹2,500 and commercial cylinders nearing ₹3,000 in several parts of the Capital – nearly double the official rates.

Officially, a 14.2-kg domestic LPG cylinder in Delhi costs ₹913, while a 19-kg commercial cylinder costs ₹1,883. But city residents HT spoke to Wednesday said they are either paying exorbitant prices in the black market or struggling to find cylinders altogether.

With supply disruptions continuing and panic buying showing no signs of slowing, many fear the crisis could soon disrupt everyday life across the Capital.

For thousands of low-income residents – particularly those living in unauthorised colonies without piped gas connections and reliant on smaller 5kg cylinders – the issue has become a daily survival challenge.

'Two days without gas'

Mouni, a domestic worker living in Zamrudpur, said she spent two days searching for a cylinder before finally giving in to black-market rates and buying one at a much higher price.

"I have three kids and we had no LPG at home for two days. I asked my neighbours but they also didn't have spare cylinders. Finally, after two days I managed to get one from a shop for ₹1,400. Usually we get it for ₹900," she said.

"Two of my neighbours have not cooked anything in the last two days. Some people are eating fruits," she added.

Soni, who only goes by single name and works as domestic help in East Vinod Nagar, said that her cylinder had run out two days ago.

"My husband spent all of Tuesday looking for a cylinder, but we could not find. After not cooking anything yesterday, we sought help from one of the families we work with in Mayur Vihar and finally gave us one," she said.

While some neighbourhoods reported manageable delays, others described chaotic scenes. In west Delhi's Kirti Nagar, residents said they were unable to find cylinders even after offering inflated prices.

"There are no cylinders in the market. Even when we offered ₹2,000–₹2,500, we were unable to find one," said Hemant Monga, a Rajouri Garden resident waiting for a cylinder at a Kirti Nagar gas agency.

Atul Goel, who heads URJA, an umbrella body of resident welfare associations, said the biggest problem were rumours around the shortage, which have led many households to stock up cylinders.

"Hoarding is the real problem. People are worried about supply and are trying to secure extra cylinders from wherever they can," Goel said.

At a supplier outlet in the Munirka-Katwaria Sarai area, LPG distributor agent Bhajan Lal said refill prices had doubled within days.

"We were earlier selling cylinder refills at around ₹1,000 but the price has doubled in the last three to four days," he said.

Vendors, eateries hit

Meanwhile, food markets and roadside eateries, whose livelihood depend on consistent supply of cylinders, said the exorbitant black-market rates have started eating into already razor-thin profit margins.

Deepak Panthi, who manages a small eatery in Connaught Place, said he has already drastically cut his menu to conserve gas. "We are only serving two high-demand items. If the situation continues like this for a few more days, we will have no option but to shut the shop temporarily," Panthi said.

"We managed to get one cylinder yesterday but only after paying ₹600 extra. Just 10 days ago I bought a cylinder for ₹1,900. Yesterday the same cylinder cost me ₹2,500," said a street vendor in Nizamuddin.

Street vendors in Sarojini Nagar market reported smaller cylinders being sold at inflated rates. "The 5kg cylinder we used to get for ₹500 from Lajpat Nagar is now ₹800. Even refill prices have gone up. We got a 10kg cylinder refilled for ₹1,600 yesterday," said Veeresh Yadav, who runs a street food stall.

The owner of a Connaught Place restaurant, who asked not to be identified, said he has only two days of stock left. "Commercial cylinders are just not available even for ₹3,000. If the situation does not improve soon, I will have to shut the restaurant for a few days," he said.

Hindustan Times

Economics and chemistry of India's fuel shock

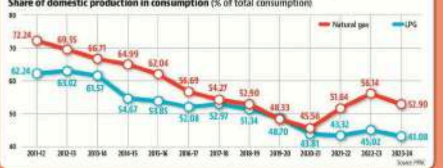
By Abhishek Jha and Roshan Kishore

Economists are busy calculating the terms of trade shock of the ongoing war in West Asia on India. The non-economists are worried about restaurants and houses running out cooking gas. The real impact of the shock will be determined by the economic chemistry of hydrocarbons and second order economic effects of the disruption because of the war. Here are some data points which put things in perspective.

1 Methane-powered kitchens might be more immune to a supply shock than propane-butane kitchens

Petroleum ministry data shows that there were 329.7 million active domestic Liquefied Petroleum Gas (LPG) connections in India as on 1 April 2025. The number of domestic Piped Natural Gas (PNG) connections was just about 15 million at the end of 2025. While both PNG and LPG are used for cooking, the former is primarily methane while the latter is liquefied mixture of propane and butane. What makes LPG more useful compared to PNG is that it can be liquefied in high pressure cylinders and therefore supplied to kitchens without gas pipelines (liquefying natural gas requires sub-zero temperatures irrespective of pressure). Import and consumption data from the Petroleum Planning and Analysis Cell (PPAC) of the Ministry of Petroleum and Natural Gas shows that over 60% of LPG in India is imported compared to around 50% of natural gas, making the latter somewhat more immune to war-driven supply shock. To be sure, part of the panic might have been created by the government deciding to ration commercial LPG which might have had a very small share in total consumption. A basic simulation of average consumption and production of LPG data for 2023-24 (latest data for which both numbers are available) shows that domestic production can meet 43% of demand if there are no LPG exports. This means that an increase in current orders to 1.43 times their usual levels can decrease stock to zero. Even this, however, must be read with the fact that even domestic LPG production requires either crude oil or natural gas. Almost 90% of the former and around half of the latter is imported by India.

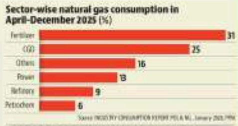
Share of domestic production in consumption (% of total consumption)



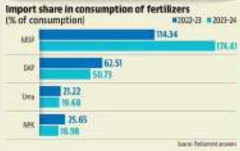
2 The supply shock is more serious beyond the cabinet's kitchen concerns

The union government on Tuesday issued an order invoking the Essential Commodities Act prioritising gas supplies for domestic use and transport even as it said industrial use supplies including those for fertilizers will be rationed subject to operational availability. Petroleum ministry's own data shows that this basically means natural gas supplies are being curtailed for majority of the users in the country as City Gas Distribution (CGD) – serving kitchens or CNG pumps – is just about a quarter of the total natural gas consumption in the Indian economy. Fertilizers alone consume more natural gas than CGD in the country. And this should be a cause for concern because imports are a relatively smaller share of fertilizer consumption in India. If the supply of a critical input such as natural gas is withheld, domestic production might see a big decline and have an adverse impact on agricultural production.

Sector-wise natural gas consumption in April-December 2025 (%)



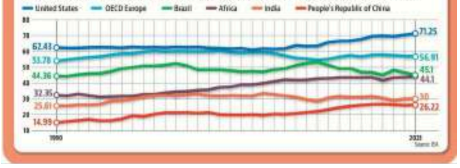
Import share in consumption of fertilizers (% of consumption)



3 Had it not been for coal, India would be in more trouble

What makes India relatively more immune to an oil and gas supply disruption is the fact that it does not use oil and gas for heating houses (such as in most OECD countries) and even generating power. This is what makes countries in Europe and North America much more vulnerable to economic shocks due to supply shocks in natural gas and oil, with more than half of their primary energy supply met through these sources. For India, this proportion is less than one-third. Coal, a dirtier hydrocarbon than oil and gas, continues to be the most important source of both energy supply and power generation. For example, as of January 2026, gas and diesel accounted for only 4% of installed capacity, while coal and non-fossil sources accounted for 44% and 52%. While there are valid concerns about coal being a dirty fuel and contributing to global warming and the climate crisis, the choice between a coal powered economy and no-power economy ought to be a non-brainer.

Share of oil and natural gas in total energy supply (% of total energy supply from all sources)



Hindustan Times, Delhi, 12/03/2026
Page No: 2, Size: 44.61cm × 37.47cm

Hindustan Times

LNG SHOCKWAVES

Global gas supply hit

A major disruption in Liquefied Natural Gas (LNG) exports is tightening global energy markets, with countries scrambling to secure the fuel amid surging prices

LNG gas import and export terminals in the Persian Gulf

Import terminal · Export terminal · Chokepoint

8 MILLION METRIC TONS
Global LNG imports last week

26%
Week-on-week drop in LNG imports

16% DECLINE
in global LNG supply in the same period

WHAT IS LNG?

LNG is natural gas that has been cooled to a liquid state at about -162°C. This process reduces its volume by around 600 times. It has a wide range of applications:

- Power generation
- Fuel for heavy-duty vehicles
- Fertiliser manufacturing
- Heating water and buildings

MAJOR SUPPLY HUB GOES OFFLINE

20% Share of global LNG supply linked to Ras Laffan export hub

3 PER DAY Qatari LNG cargoes removed from the market during the disruption

1.5 MILLION TONS Weekly reduction in surplus if Qatar outage continues

An Iranian drone attack has halted operations at Qatar's Ras Laffan, the world's largest LNG export facility. For five days, no LNG tanker left the terminal, the longest interruption since records began in 2008. At the same time, shipping through the Strait of Hormuz, from where 1/5th of global LNG trade flows, has stopped.

RIPPLE EFFECT

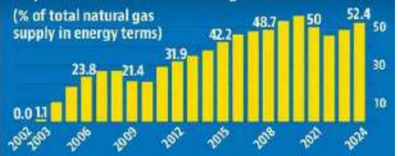
The disruption is already reshaping global trade flows. With spare supply quickly drying up, Europe and Asia are entering a bidding war for cargoes raising gas prices sharply. European natural gas prices have surged roughly 70% since the conflict began.

What it means for India

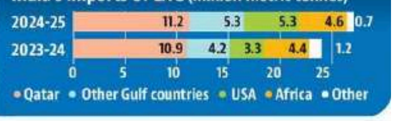
India's fertiliser sector relies heavily on LNG imports, with a significant share sourced from the West Asia. Imports have accounted for almost half of India's natural gas demand since 2016. Over 40% of India's LNG imports come from Qatar. Combined with the imports from UAE and Oman, over 60% of the country's LNG imports arrive via the Strait of Hormuz.

LNG is the primary feedstock for production of urea, the world's most widely used fertiliser, and is also used to make LPG. Some urea companies have shut down plants or moved up annual maintenance after Qatari supplies were hit. A prolonged disruption could force India, the world's largest urea importer, to increase purchases from global markets.

Import share in total natural gas demand in India



India's imports of LNG (million metric tonnes)



गेल GAIL

Business Standard Hindi, Delhi, 12/03/2026

Page No: 2, Size: 83.82cm × 29.45cm

गैस की चिंता में इलेक्ट्रिक कुकिंग के तरीके अपना रहे लोग

उदिशा श्रीवास्तव और
शार्लीन डिसूजा
नई दिल्ली/मुंबई, 11 मार्च

इंडक्शन कुकटॉप की मांग बढ़ने के बाद ऑफलाइन और ऑनलाइन खुदरा विक्रेता इलेक्ट्रिक कुकर, केटल और एयर फ्रायर जैसे उत्पादों की बिक्री में बढ़ोतरी देख रहे हैं। ऐसा इसलिए है क्योंकि पश्चिम एशिया में चल रहे संघर्ष के बीच पाइप्ड नैचुरल गैस (पीएनजी) और तरलीकृत पेट्रोलियम गैस (एलपीजी) की आपूर्ति में संभावित रुकावट के संबंध में चिंता बढ़ रही है।

खुदरा विक्रेताओं का कहना है कि मांग में अचानक हुई इस बढ़ोतरी ने उद्योग को हैरत में डाल दिया है और यह डर बढ़ गया है कि अगर यह चलन जारी रहा तो स्टोरों में जल्द ही स्टॉक खत्म हो सकता है।

क्रोमा स्टोरों का संचालन करने वाली इनफिनिटी रिटेल के प्रबंध निदेशक मुख्य कार्य अधिकारी शिवाशीष रॉय ने कहा कि खरीदारी में यह बढ़ोतरी तेज और खासी ज्यादा रही है। रॉय ने कहा, 'इंडक्शन कुकटॉप के साथ-साथ हम इलेक्ट्रिक केटल की मांग में भी बढ़ोतरी देख रहे हैं, जिसकी बिक्री सामान्य दर के मुकाबले लगभग दोगुनी हो चुकी है।'

रॉय ने कहा, 'क्रोमा में हमने पिछले कुछ दिनों के दौरान इंडक्शन कुकटॉप की मांग में तेजी से और तुरंत ही

गैस किल्लत की चिंता के बीच इंडक्शन कुकटॉप की मांग पिछले कुछ दिनों में खासी बढ़ गई है

बढ़ोतरी देखी है। हमारी दैनिक औसत दर सामान्य स्तर की तुलना में लगभग तीन गुना बढ़ चुकी है।' उन्होंने कहा, 'दिलचस्प बात यह है कि हम ग्राहकों को एक बार में ही कई इकाई खरीदते हुए भी देख रहे हैं, जो पहले सामान्य बात नहीं थी, जो कुछ सतर्कतापूर्ण खरीदारी किए जाने का संकेत है।'

फ्लिपकार्ट में भी यही रुझान है, जहां हाल के दिनों में बिक्री में काफी बढ़ोतरी हुई है। यह बढ़ोतरी केवल इंडक्शन कुकटॉप तक ही सीमित नहीं है। फ्लिपकार्ट ने कहा कि इलेक्ट्रिक कुकर, केटल और एयर फ्रायर की मांग भी तेजी से बढ़ी है, जिससे पता चलता है कि परिवार तेजी से इलेक्ट्रिक कुकिंग के विकल्प ढूंढ रहे हैं।

फ्लिपकार्ट प्रवक्ता ने कहा, 'मौजूदा वैश्विक हालात ने इंडक्शन कुकटॉप को कई परिवारों के लिए 'किचन को आधुनिक' बनाने के बजाय 'जीवन की आवश्यकता' में तब्दील कर दिया है।' उन्होंने कहा, 'हम एलपीजी की बढ़ती लागत और आपूर्ति की कमी के कारण इंडक्शन की बिक्री में भारी वृद्धि देख रहे हैं।' कंपनी के अनुसार पिछले तीन से चार सप्ताह की तुलना में पिछले चार से पांच दिनों में बिक्री चार गुना बढ़ गई है। कुछ क्षेत्रों में विशेष रूप से मजबूत मांग देखी जा रही है।

टीटीके प्रेस्टीज के प्रबंध निदेशक और मुख्य कार्य अधिकारी वेंकटेश विजयराघवन के अनुसार मांग में पहले ही तेज उछाल आ चुकी है। उन्होंने बिजनेस स्टैंडर्ड को बताया, 'हालांकि मांग सामान्य स्तर की तुलना में पांच गुना बढ़ गई है। लेकिन हम वर्तमान में सामान्य मांग की तुलना में लगभग 3 से 3.5 गुना तक की ही आपूर्ति कर पा रहे हैं। हम उत्पादन बढ़ा रहे हैं। हमारी इकाइयां तीन पालियों में काम कर रही हैं।' उन्होंने कहा कि हालांकि मांग फिलहाल सामान्य से लगभग पांच गुना अधिक है, लेकिन संभावना है कि आने वाले दिनों में यह सामान्य स्तरों के लगभग तीन गुना पर स्थिर हो जाएगी।

मांग में यह तेजी ऑनलाइन प्लेटफॉर्म पर भी इसी तरह दिखाई दे रही है। लोग खाना पकाने वाली गैस का विकल्प तलाश रहे हैं और आपूर्ति की संभावित रुकावट के लिए तैयारी कर रहे हैं। ई-कॉमर्स प्लेटफॉर्मों ने पिछले कुछ दिनों में इंडक्शन कुकटॉप की सर्च और खरीद में तेजी से उछाल दर्ज की है।

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पश्चिम एशिया में बढ़ते संघर्ष का असर : एलपीजी-सीएनजी की आपूर्ति में दिक्कत के साथ-साथ बढ़ रही परेशानी

कुछ उद्योगों पर आई गैस की आंच

बीएस संवाददाता
मुंबई/कोलकाता, 11 मार्च

प्राकृतिक गैस और एलपीजी आपूर्ति में रुकावट की चिंताओं ने कुछ उद्योगों के कामकाज पर असर डालना शुरू कर दिया है, हालांकि उद्योग के कई अधिकारियों का कहना है कि अभी तक इसका असर बेहद सीमित ही है।

दो बड़े इस्पात उत्पादकों ने बताया कि गैस की किल्लत ने कुछ डाउनस्ट्रीम प्रोसेस पर असर डालना शुरू कर दिया है, हालांकि समस्या अभी बहुत अधिक नहीं है। उद्योग के एक अधिकारी ने कहा कि प्राकृतिक गैस या प्रोपेन का इस्तेमाल आमतौर पर भट्ठियों में होता है, जिसका मतलब है कि आपूर्ति की दिक्कतों से उत्पादन पूरी तरह बचा नहीं रह सकता।

अधिकारी ने कहा, 'भट्ठी में प्राकृतिक गैस या प्रोपेन का इस्तेमाल होता है, इसलिए असर पड़ता है। अभी तक, यह बहुत ज्यादा नहीं है।' हालांकि, छोटी इस्पात मिलों ने चेतावनी दी है कि अगर किल्लत बनी रही तो हालात और खराब हो सकते हैं। स्टील री-रोलिंग मिल्स एसोसिएशन ऑफ इंडिया के चेयरमैन विवेक अदुकिया ने कहा कि एलपीजी भले ही मुख्य कच्चा माल न हो, लेकिन यह कुछ परिचालन प्रक्रियाओं के लिए यह जरूरी है।

अदुकिया ने कहा, 'इंडक्शन फर्नेस ऑपरेटर जो बिलेट बनाते हैं, उन्हें लैसिंग के लिए एलपीजी की जरूरत होती है। इसके बिना, उत्पादन चक्र पूरा नहीं हो सकता।' उनके मुताबिक, ज्यादातर मिलों के पास अभी अगले कुछ दिनों तक काम करने के लिए काफी माल है। उन्होंने कहा, 'अगर हालात ऐसे ही बने रहे, तो कुछ मिलों को बंद करना पड़ सकता है।'

पैकेज्ड फूड कंपनियों पर भी दबाव दिखने लगा है। उद्योग के अधिकारियों ने इस सप्ताह की शुरुआत में बिजनेस स्टैंडर्ड को बताया कि कुछ निर्माताओं को कुछ राज्यों में मौजूद संयंत्रों में उत्पादन कम करना पड़ा है क्योंकि गैस आपूर्ति अभी भी कम है। इसके विपरीत, वाहन क्षेत्र पर अब तक गैस आपूर्ति की चिंताओं का ज्यादा असर नहीं पड़ा है।

उद्योग के जानकारों ने कहा कि कार निर्माता कंपनियां सामान्य तरीके से काम कर रही हैं और बदलती स्थिति पर करीब से नजर रख रही हैं। सूत्रों ने कहा कि भारत की सबसे बड़ी यात्री वाहन निर्माता कंपनियों में से एक टाटा मोटर्स के परिचालन में अब तक कोई रुकावट नहीं आई है।

उद्योग के विश्लेषकों का भी कहना है कि वाहन निर्माण पर तुरंत असर कम ही रहेगा। प्राइमस पार्टनर्स के सलाहकार अनुराग सिंह ने कहा कि प्राकृतिक गैस की उपलब्धता को लेकर चिंताओं के बावजूद उत्पादन बिना किसी रुकावट के जारी रहा है। सिंह ने कहा, 'अभी तक, वाहनों के उत्पादन में कोई रुकावट नहीं आई है। निर्माण के लिए जरूरी मुख्य कच्चे माल जैसे मेटल और पॉलिमर पर कोई असर नहीं पड़ा है। पॉलिमर मुख्य रूप से तेल से मिलते हैं और रिफाइनरी का काम जारी है, इसलिए गाड़ी बनाने के लिए बेसिक सप्लाई चेन बनी हुई है।'

हालात बद से बदतर होने की आशंका

- छोटी इस्पात मिलों ने आशंका जताई है कि अगर किल्लत बनी रही तो हालात हो सकते हैं और खराब
- ज्यादातर मिलों के पास अभी अगले कुछ दिनों तक काम करने के लिए पर्याप्त माल है मौजूद
- पैकेज्ड फूड कंपनियों पर भी दिखने लगा दबाव

कंपनियों के दफ्तर रख रहे हालात पर नजर

एलपीजी की किल्लत से उन कैटरिंग सेवाओं पर भी असर पड़ सकता है जो बड़े कॉरपोरेट परिसरों को मदद करती हैं, खासकर आईटी कंपनियों और बहुराष्ट्रीय कंपनियों को।

बेंगलूरु के फूड टेक्नॉलजी प्लेटफॉर्म हंगरबॉक्स ने कहा कि अभी परिचालन सामान्य बना हुआ है। कंपनी 243 ग्राहकों को सेवा मुहैया कराती है, 891 कैफेटेरिया का प्रबंधन करती है और 38 शहरों में 886 फूड पार्टनर्स के साथ काम करती है।

(साथ में अंजलि सिंह, ईशिता आयान दत्त, शिवानी शिंदे और शार्लीन डिसूजा)

Dainik Jagran, Delhi, 12/03/2026
Page No: 1, Size: 31.06cm × 25.00cm

अमेरिका में रिफाइनरी लगाएगी रिलायंस

वाशिंगटन, प्रेट्र : मुकेश अंबानी की कंपनी रिलायंस इंडस्ट्रीज अमेरिका में बनने वाली नई तेल रिफाइनरी में निवेश करेगी। अमेरिकी राष्ट्रपति डोनाल्ड ट्रंप ने खुद इसका एलान किया है। यह पिछले 50 वर्षों में अमेरिका में लगाई जाने वाली पहली तेल रिफाइनरी होगी। ट्रंप ने इसे अमेरिकी इतिहास की सबसे बड़ी रिफाइनरी करार दिया है।

परियोजना का संचालन कर रही कंपनी "अमेरिका फर्स्ट रिफाइनिंग" (एएफआर) ने कहा-नई रिफाइनरी टेक्सास के ब्राउंसविले में होगी और इसे पूरी तरह से अमेरिकी शेल तेल पर चलने के लिए डिजाइन किया जाएगा। शेल तेल एक प्रकार का गैर पारंपरिक ईंधन है, जो शेल नामक अवसादी चट्टानों के भीतर पाया जाता है। रिलायंस इस रिफाइनरी से उत्पादित ईंधन की 20 वर्षों तक खरीदारी भी करेगी। परियोजना का शिलान्यास 2026 की दूसरी तिमाही में होने वाला है।

डोनाल्ड ट्रंप मुकेश अंबानी

- **ट्रंप ने किया एलान, 50 वर्ष बाद अमेरिका में होगी नई रिफाइनरी**
- **रिलायंस ने 20 साल तक ईंधन खरीदने का भी किया समझौता**

ट्रंप ने ट्रुथ सोशल पर एक पोस्ट में रिलायंस को इस परियोजना में भागीदार बताया और इसे ऐतिहासिक 300 अरब डालर का सौदा कहा। यह घोषणा ऐसे समय हुई है, जब अमेरिका-इजरायल का ईरान के खिलाफ युद्ध तेल बाजारों को प्रभावित कर रहा है और व्हाइट हाउस ऊर्जा की बढ़ती कीमतों के बारे में चिंता कम करने के तरीके खोज रहा है। रिलायंस ने इस पर तत्काल कोई टिप्पणी नहीं की है।

1977 में लुइसियाना का गैरीविले संयंत्र चालू होने के बाद अमेरिका की यह पहली बड़ी रिफाइनरी होगी। न तो ट्रंप और न ही एएफआर ने परियोजना के वित्तीय विवरण या पूरा होने की समय सीमा के बारे में कोई जानकारी दी है। यह रिलायंस द्वारा अमेरिका में स्थापित की जाने वाली पहली तेल रिफाइनरी होगी। कंपनी गुजरात के जामनगर में दुनिया का सबसे बड़ा रिफाइनिंग संयंत्र चलाती है, जिसकी क्षमता 12.4 करोड़ बैरल कच्चे तेल की रिफाइनिंग करने की है। रिलायंस की अमेरिका में ऊर्जा व्यापार, प्रौद्योगिकी साझेदारी और निवेश के माध्यम से लंबे समय से व्यावसायिक उपस्थिति रही है।

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पश्चिम एशिया में चल रहे संकट से तेल व गैस की आपूर्ति प्रभावित

बढ़ेगा राजकोषीय दबाव

रुचिका चित्रवंशी, संजीव मुखर्जी और हिमांशी भारद्वाज
नई दिल्ली, 11 मार्च

पश्चिम एशिया में संघर्ष लंबा चलने की स्थिति में भारत की अर्थव्यवस्था पर राजकोषीय दबाव बढ़ सकता है। विशेषज्ञों के अनुसार वित्त वर्ष 27 में राजस्व संग्रह पर प्रतिकूल प्रभाव पड़ने के साथ-साथ खाद्य पदार्थों और उर्वरकों पर सब्सिडी का खर्च भी बढ़ सकता है।

पश्चिम एशिया में संघर्ष इस महीने की शुरुआत में छिड़ा था और उसके बाद से यूरिया के दाम 100 डॉलर प्रति टन बढ़कर लगभग 600 डॉलर प्रति टन (एफओबी) तक पहुंच गए हैं। इस क्रम में डीएपी की कीमतें भी संकट के दौरान 650-670 डॉलर प्रति टन से बढ़कर लगभग 750-770 डॉलर प्रति टन हो गई हैं। भारत ने वित्त वर्ष 2025 में खाड़ी देशों से अपने यूरिया का लगभग 70 प्रतिशत, डाई-अमोनिया फॉस्फेट (डीएपी) का 42 प्रतिशत, अमोनिया का 83 प्रतिशत और एलएनजी का 60 प्रतिशत आयात किया।

उर्वरक उत्पादन में प्रमुख घटक अमोनिया है। उसकी कीमतों में अगले तिमाही निर्धारण चक्र में तेज वृद्धि की उम्मीद है। उर्वरक में इस्तेमाल होने वाली अहम सामग्री रॉक फॉस्फेट और फॉस्फोरिक एसिड की कीमतें बढ़ रही हैं।

वित्त मंत्रालय ने किसी भी अचानक आर्थिक झटके से निपटने के लिए कदम उठाए। इसके तहत मंत्रालय ने मंगलवार को संसद में पेश किए गए अनुदानों की दूसरी अनुपूरक मांगों के हिस्से के रूप में वित्त वर्ष 26 के लिए आर्थिक स्थिरीकरण कोष के लिए आबंटन को बढ़ाकर एक लाख करोड़ रुपये कर दिया। इस क्रम में वित्त वर्ष 26 के लिए उर्वरक सब्सिडी के मद में 19,230 करोड़ रुपये और खाद्य सब्सिडी के लिए 23,640 करोड़ रुपये का अतिरिक्त व्यय भी आबंटित किया गया।

वित्त वर्ष 27 के बजट अनुमान में खाद्य सब्सिडी 2,27,629 करोड़ रुपये निर्धारित की गई है, जो वित्त वर्ष 26 के संशोधित अनुमान से थोड़ी कम है। हालांकि सूत्रों ने कहा कि यदि सरकार केंद्रीय पूल के लिए अनुमान से अधिक गेहूं और चावल की खरीद करती है तो पहले से ही बढ़ा हुआ अनाज का भंडार और भी ज्यादा हो सकता है। लिहाजा खाद्य सब्सिडी और बढ़ जाएगी।

केंद्र ने वित्त वर्ष 27 में लगभग 3.03 करोड़ टन गेहूं की खरीद का अनुमान लगाया है किंतु व्यापारियों ने कहा कि वास्तविक खरीद इससे अधिक हो सकती है। कारण यह है कि न्यूनतम समर्थन मूल्य (एमएसपी) मौजूदा बाजार दर से काफी अधिक है।

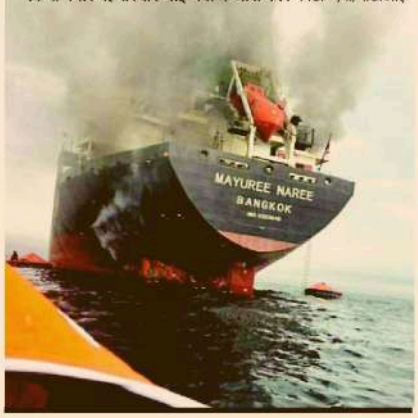
सब्सिडी की गणना सामान्य मॉनसून पर भी निर्भर करती है। यदि वित्त वर्ष 27 में अल नीनो के कारण मॉनसून सामान्य से कम रहता है तो खजाने पर और बोझ आ सकता है क्योंकि कृषि और ग्रामीण कार्यों के लिए मदद बढ़ानी पड़ेगी।

क्रिसिल इंटेलिजेंस ने बुधवार को जारी रिपोर्ट में कहा कि पश्चिम एशिया संघर्ष नया और बहुआयामी जोखिम है और इससे वित्त वर्ष 27 के लिए सकल घरेलू उत्पाद में 7.1 प्रतिशत की वृद्धि का अनुमान और भी नीचे आ सकता है। रिपोर्ट में कहा गया, ' अगर पश्चिम एशिया में भू-राजनीतिक अनिश्चितताएं लंबे अरसे तक बनी रहीं तो कच्चे तेल की कीमतें लगातार ऊंची रहेंगी और आयात भी महंगा हो सकता है। इससे 2026-27 में चालू खाते का घाटा बढ़कर जीडीपी के 1.5 प्रतिशत तक हो सकता है। वित्त वर्ष 2026 में यह घाटा जीडीपी के 0.8 प्रतिशत तक रहने का अनुमान लगाया गया है।'

नोमूरा ने भी अपने मासिक ग्लोबल इकनॉमिक आउटलुक में कहा कि अगर तनाव बना रहता है तो भारत में तेज वृद्धि और स्थिर मुद्रास्फीति की बेहतरीन स्थिति डांवांडोल हो सकती है। वित्त वर्ष 2027 में शुद्ध कर राजस्व 7.2 प्रतिशत बढ़ने का अनुमान लगाया गया है लेकिन वृद्धि सुस्त पड़ी तो संग्रह कम रह सकता है।

वित्त मंत्रालय की मासिक आर्थिक समीक्षा में पिछले दिनों कहा गया था कि खाड़ी संघर्ष के कारण आने वाले वर्षों में केंद्र और राज्य सरकारों को राजकोषीय संसाधन ढूंढने पड़ेंगे और प्राथमिकता नए सिरे से तय करनी पड़ सकती हैं।

थाई कार्गो शिप, मयूरी नारी पर बुधवार को होर्मुज स्ट्रेट में हमला किया गया। यह तस्वीर थाई नेवी ने जारी की। *फोटो-एपी/पीटीआई*



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ऊंची कीमतों से तेल कंपनियों पर दबाव

सुधीर पाल सिंह
नई दिल्ली, 11 मार्च

रेटिंग एजेंसी मूडीज रेटिंग्स का कहना है कि कच्चे तेल के प्रमुख स्रोतों में से एक, पश्चिम एशिया से आपूर्ति बाधित होने से वैश्विक कीमतों में तेजी आई है। इससे आने वाले महीनों में तेल कंपनियों पर वित्तीय दबाव बढ़ने की संभावना है।

रिपोर्ट में कहा है कि ईंधन की कीमतों पर नियंत्रण के दौर और नीतिगत प्रतिक्रिया में देरी से तेल की कीमत में तेजी का असर पड़ेगा। भारत की सरकारी तेल विपणन कंपनियां मुनाफे पर दबाव और नकदी में उतार चढ़ाव का सामना कर रही हैं। देश में ईंधन की 90 प्रतिशत खुदरा आपूर्ति 3 ओएमसी करती हैं। मूडीज ने रिपोर्ट में कहा, 'ऊर्जा की ज्यादा कीमतों के कारण बढ़ती इनपुट लागत का बोझ कंपनियों को उठाना पड़ेगा, लेकिन कंपनियां बिक्री मूल्य में समय से बढ़ोतरी नहीं कर सकेंगी क्योंकि इस पर सरकार का असर होता है।'

GAIL

Business Standard Hindi, Delhi, 12/03/2026

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तेल व गैस के कम भंडार से अर्थव्यवस्था को जोखिम

अभिजित लेले
मुंबई, 11 मार्च

पश्चिम एशिया में चल रहे टकराव के विपरीत असर को देखते हुए एसऐंडपी ग्लोबल रेटिंग्स ने बुधवार को कहा कि भारत के पास ऊर्जा के जरूरत से कम रणनीतिक भंडार के कारण उसकी अर्थव्यवस्था को जोखिम है। भारत, थाईलैंड, दक्षिण कोरिया, वियतनाम, सिंगापुर जैसे एशियाई देश सकल घरेलू उत्पाद की तुलना में ऊर्जा के आयात पर बहुत अधिक निर्भर हैं।

बहुत ज्यादा जरूरत के बावजूद भारत के पास सीमित भंडार है। देश के पेट्रोलियम के रणनीतिक भंडार की क्षमता से 10 दिन की खपत की जरूरतों को पूरा किया जा सकता है, जबकि वाणिज्यिक भंडार सिर्फ 65 दिन का है।

एसऐंडपी ने अपनी दो रिपोर्टों में कहा है कि तरलीकृत पेट्रोलियम गैस (एलपीजी) और तरलीकृत प्राकृतिक गैस (एलएनजी) का भंडार और कम है और इससे क्रमशः 25-30 दिन और 10-12 दिन की जरूरतें ही पूरी की जा सकती हैं। एक रिपोर्ट एशिया के तेल व गैस और दूसरी ऋण की स्थितियों से संबंधित है।

भंडार से कम सुरक्षा होने के कारण विकल्पों की तलाश हो रही है। भारत कच्चे तेल की अपनी जरूरतों का 88 प्रतिशत आयात करता है और यह विश्व का तीसरा बड़ा आयातक है। देश में 58 लाख बैरल प्रतिदिन खपत होती है, जिसमें से 25 से 27 लाख बैरल स्ट्रेट ऑफ होर्मुज के मार्ग से आता है। वहीं स्ट्रेट से खपत का करीब 55 प्रतिशत एलपीजी और 30 प्रतिशत एलएनजी आता है। रूस से आयात को लेकर रेटिंग एजेंसी ने कहा है कि रूस के कच्चे तेल के आयात से प्रतिबंध हटाए जाने से कुछ राहत मिली है, लेकिन इसकी कीमत ऊंची हो सकती है। इस इलाके की ज्यादातर अर्थव्यवस्थाओं की ऊर्जा आपूर्ति प्रभावित हुई है, क्योंकि ज्यादातर आयात पर निर्भर हैं। रिपोर्ट में कहा गया है कि इनमें से जीडीपी की तुलना में ऊर्जा आयात पर अधिक निर्भरता वाले देशों पर खतरा अधिक है।

भारत अपनी कच्चे तेल की जरूरतों को पूरा करने के लिए समुद्री रास्तों पर निर्भर रहेगा, लेकिन इसमें विविधीकरण की कुछ गुंजाइश है। भारत रूस और दक्षिण अमेरिका जैसे एशिया के बाहर के देशों से भी तेल खरीदता रहा है। रूस से खरीद अभी 11 लाख बैरल प्रतिदिन है, जबकि वेनेजुएला से पिछले महीने से 1.42 लाख बैरल प्रतिदन खरीद फिर से शुरू हुई है।

इस समय चल रहे संकट के बारे में रिपोर्ट में कहा गया है कि सरकार के दिशानिर्देशों और बढ़ती कीमतों के कारण मार्जिन कम हो सकता है।

एलपीजी की आपूर्ति बाधित होने से दिल्ली के लोग चिंतित, छात्र बाहर खाने को मजबूर

नई दिल्ली। एलपीजी आपूर्ति को लेकर चिंता के बीच दिल्ली के लोगों और छात्रों की परेशानी बढ़ गई है। कई परिवार इंडक्शन यानी इलेक्ट्रिक चूल्हे का उपयोग करने लगे हैं, जिससे उनके बिजली बिल बढ़ने का खतरा है। वहीं, किराए के मकानों में रहने वाले छात्र बाहर का खाना खाने को मजबूर हो रहे हैं। लोगों का कहना है कि सीमित एलपीजी स्टॉक वाले परिवारों में इस स्थिति को लेकर चिंता है, क्योंकि उन्हें यह पता नहीं है कि उन्हें भरा हुआ सिलेंडर कब मिलेगा।

दिल्ली में लगभग 2,500 आरडब्ल्यूए (रेजिडेंट वेलफेयर एसोसिएशन) का प्रतिनिधित्व करने वाले संगठन, यूनाइटेड रेजिडेंट्स ऑफ जॉइंट एसोसिएशन (यूआरजेए) के अध्यक्ष अतुल गोयल ने कहा कि कई निवासियों ने संगठन से संपर्क कर शिकायत की है कि उन्हें एलपीजी सिलेंडर नहीं मिल रहे हैं।गोयल ने कहा, कुछ लोग हमारे पास आकर कह रहे हैं कि उन्हें कहीं भी गैस सिलेंडर नहीं मिल रहे हैं और वे इंडक्शन चूल्हे का इस्तेमाल करने को मजबूर हैं। लेकिन उन्हें डर है कि इससे बिजली बिल में काफी वृद्धि होगी और वे यह नहीं जानते कि वे कब तक इस तरह रह पाएंगे। पश्चिम एशिया में बढ़ते संघर्ष के कारण ऊर्जा आपूर्ति बाधित होने के बीच सरकार ने घरेलू स्तर पर उत्पादित प्राकृतिक गैस के आवंटन के लिए प्राथमिकता क्रम में संशोधन किया है, जिसमें सीएनजी और पाइप वाली खाना पकाने की गैस के अलावा एलपीजी उत्पादन को शीर्ष पर रखा गया है।

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ईंधन का पर्याप्त स्टॉक, अवैध भंडारण न करें वर्ना होगी कार्रवाई : एडीएम

वैभव न्यूज ■ बुलंदशहर

प्रदेश के खाद्य एवं रसद विभाग के आयुक्त के निर्देश पर जिले मे एलपीजी गैस सिलेंडर एंव डीजल तथा पेट्रोल पर्याप्त उपलब्धता, सुचारू वितरण,उपभोक्ताओं की समस्याओं के त्वरित निराकरण को एडीएम वित्त की अध्यक्षता में कलैक्ट्रेट सभागार में जनपद के समस्त पेट्रोलियम कम्पनियों के विक्रय अधिकारियों एवं गैस वितरकों, पेट्रोल पम्पधारकों की बैठक की गयी। जनपद में प्रचलित कुल 649975 घरेलू एवं 385106 उज्जवला योजना के इस प्रकार 1035081 कनेक्शन पर गैस की बुकिंग एवं डिलीवरी की समीक्षा में विक्रय अधिकारियों द्वारा बताया गया कि वर्तमान में घरेलू गैस की निरन्तर आपूर्ति सुनिश्चित की जा रही है। बैठक मे गैस वितरकों को अपने एजेंसियों पर ग्राहकों के सूचनार्थ प्रतिदिन स्टॉक स्थिति,गैस कम्पनी के अधिकारियों,एजेंसी संचालकों के मोबाईल नम्बर आदि का प्रदर्शन करने तथा उपभोक्ताओं की सुविधा को एजेंसियों पर हेल्पडेस्क बनाने के निर्देश दिये गये। बताया गया कि कनेक्शनधारक आवश्यकता होने पर अपने गैस कनेक्शन में रजिस्टर्ड मोबाईल नम्बर के माध्यम से गैस बुक करा सकते हैं,एलपीजी गैस की बुकिंग की न्यूनतम सीमा 25 दिन की गयी है,जिसके उपरान्त गैस वितरक द्वारा ओटीपी बेस्ड होम डिलीवरी सुनिश्चित की जायेगी।

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ईंधन और गैस आपूर्ति पर प्रशासन की नजर, जिला पूर्ति अधिकारी की सक्रियता से जमाखोरी पर लगाम

वैभव न्यूज ▪ गाजियाबाद

पश्चिम एशिया में जारी तनाव के बीच पेट्रोल, डीजल और रसोई गैस की संभावित किल्लत को लेकर देश के कई हिस्सों में लोगों के बीच चिंता का माहौल देखा जा रहा है। ऐसे समय में गाजियाबाद जिले में आवश्यक ईंधन और गैस की आपूर्ति को लेकर जिला प्रशासन पूरी तरह सतर्क है। जिला पूर्ति अधिकारी अमित तिवारी की सक्रिय कार्यशैली और लगातार निगरानी के चलते जिले में फिलहाल किसी भी प्रकार की अफरातफरी या जमाखोरी की स्थिति सामने नहीं आई है। जिला प्रशासन ने स्पष्ट किया है कि जिले में पेट्रोल, डीजल और रसोई गैस की पर्याप्त उपलब्धता है और इनकी आपूर्ति सामान्य रूप से जारी है। प्रशासन की ओर से लोगों से अपील की गई है कि वे किसी भी प्रकार की अफवाहों पर ध्यान न दें और अनावश्यक रूप से ईंधन या गैस का भंडारण न करें। जिला पूर्ति अधिकारी अमित तिवारी ने बताया कि प्रशासन की प्राथमिकता यह सुनिश्चित करना है कि आम नागरिकों को आवश्यक संसाधनों की उपलब्धता में किसी प्रकार की दिक्कत न हो। जिला पूर्ति अधिकारी खुद धरातल पर उतर कर लोगों की सहायता के साथ ही सहयोग भी अपील कर रहे है। अमित तिवारी के निर्देश पर गैस की अवैध रिफिलिंग, कालाबाजारी और खुले में पेट्रोल-डीजल की बिक्री पर सख्त रोक लगा दी गई है। प्रशासन की टीम लगातार पेट्रोल पंपों और गैस एजेंसियों की निगरानी कर रही है ताकि किसी भी प्रकार की गड़बड़ी सामने आने पर तुरंत कार्रवाई की जा सके। पेट्रोल पंप संचालकों को भी निर्देश दिए गए हैं कि यदि कोई व्यक्ति बार-बार अपने वाहन की टंकी फुल कराने आता है तो इसकी जानकारी तुरंत जिला प्रशासन को दी जाए। आशंका जताई जा रही है कि कुछ लोग वाहन में पेट्रोल भरवाकर उसे बाहर निकालकर जमा कर सकते हैं, जिससे बाजार में कृत्रिम मांग बढ़ सकती है और आपूर्ति प्रभावित हो सकती है। जिला पूर्ति अधिकारी की पहल पर रसोई गैस सिलेंडर की आपूर्ति व्यवस्था में भी आवश्यक बदलाव किए गए हैं। पहले जहां गैस सिलेंडर की डिलीवरी के लिए 21 दिन का अंतराल निर्धारित था, वहीं अब इसे बढ़ाकर 25 दिन कर दिया गया है, ताकि सभी उपभोक्ताओं तक संतुलित तरीके से गैस पहुंचाई जा सके। प्रशासन ने लोगों से अपील की है कि वे जरूरत के अनुसार ही गैस का इस्तेमाल करें और किसी भी प्रकार की जमाखोरी से बचें। सोमवार को सभी प्रकार के कमर्शियल गैस सिलेंडरों की आपूर्ति अस्थायी रूप से रोक दी गई थी, जिससे कुछ संस्थानों में चिंता की स्थिति बनने लगी थी। गाजियाबाद में बड़ी संख्या में कॉलेज, छात्रावास और शैक्षिक संस्थान हैं, जहां विद्यार्थियों के भोजन के लिए कमर्शियल गैस सिलेंडर का उपयोग किया जाता है। इसके अलावा अस्पतालों और जेल में भी भोजन व्यवस्था के लिए कमर्शियल गैस पर निर्भरता है। स्थिति को गंभीरता से लेते हुए जिला प्रशासन ने त्वरित निर्णय लिया और मंगलवार को ही शैक्षिक संस्थानों, अस्पतालों और जेलों में कमर्शियल गैस सिलेंडर की आपूर्ति जारी रखने के आदेश दे दिए। इस फैसले से इन संस्थानों को बड़ी राहत मिली। हालांकि होटल, रेस्तरां और ढाबों में कमर्शियल गैस सिलेंडर की नई आपूर्ति फिलहाल रोक दी गई है। इन प्रतिष्ठानों के पास जो सिलेंडर स्टॉक में मौजूद हैं, उन्हीं के आधार पर वे अपने संचालन को जारी रखे हुए हैं। यही वजह है कि शहर में होटल और रेस्तरां खुले हुए हैं और सामान्य रूप से काम कर रहे हैं। सोमवार और मंगलवार को कुछ गैस एजेंसियों पर लोग बिना बुकिंग कराए सिलेंडर लेने पहुंच गए, जिससे थोड़ी देर के लिए लाइन लग गई।

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भारतीय पेट्रोलियम कंपनियों के मार्जिन पर बढ़ सकता है दबाव: रेटिंग एजेंसियां

एजेंसी ■ नई दिल्ली

वैश्विक रेटिंग एजेंसियों एसएंडपी, मूडीज और फिच ने बुधवार को कहा कि कच्चे तेल और गैस की वैश्विक कीमतों में तेजी, घरेलू ईंधन कीमतों में सीमित बढ़ोतरी और आयात पर अधिक निर्भरता के कारण भारत की सरकारी पेट्रोलियम विपणन कंपनियों पर मार्जिन दबाव बढ़ रहा है। सार्वजनिक क्षेत्र की तीन पेट्रोलियम विपणन कंपनियां देशभर के करीब 90 प्रतिशत पेट्रोल पंपों का संचालन करती हैं। इनमें इंडियन ऑयल कॉरपोरेशन (आईओसी), भारत पेट्रोलियम कॉरपोरेशन लिमिटेड (बीपीसीएल) और हिंदुस्तान पेट्रोलियम कॉरपोरेशन लिमिटेड (एचपीसीएल) शामिल हैं। तीनों रेटिंग एजेंसियों ने अलग-अलग रिपोर्ट में कहा कि पश्चिम एशिया में बढ़ते

संघर्ष से वैश्विक ऊर्जा बाजारों में अस्थिरता बढ़ी है। ईरान पर 28 फरवरी को अमेरिका एवं इजराइल के संयुक्त हमलों से इस संघर्ष की शुरुआत हुई थी और इसका दायरा लगातार बढ़ता जा रहा है। भारत अपनी जरूरत का लगभग 88 प्रतिशत कच्चा तेल और प्राकृतिक गैस का करीब आधा हिस्सा आयात करता है। इनमें से 30 से 55 प्रतिशत ऊर्जा की आपूर्ति होर्मुज जलडमरूमध्य से होकर गुजरती है। देश का रणनीतिक पेट्रोलियम भंडार लगभग 10 दिन की खपत के बराबर हैं जबकि वाणिज्यिक भंडार लगभग 65 दिन की जरूरत पूरी कर सकता है। अप्रैल, 2022 से ही देश में पेट्रोल और डीजल की खुदरा कीमतें लगभग स्थिर रही हैं। मूडीज रेटिंग्स ने अपनी रिपोर्ट में कहा कि सरकार के प्रभाव के कारण बढ़ती लागत का पूरा बोझ उपभोक्ताओं पर नहीं डाला जाता है और कंपनियों को अधिक लागत का बोझ खुद ही उठाना पड़ता है। इससे पेट्रोलियम कंपनियों के विपणन मार्जिन घटते हैं और परिचालन नकदी प्रवाह पर दबाव पड़ सकता है। फिच रेटिंग्स ने कहा कि ईरान से जुड़ी आपूर्ति में लंबा व्यवधान या होर्मुज जलडमरूमध्य के लंबे समय तक बंद रहने से पेट्रोलियम विपणन कंपनियों और गेल इंडिया लिमिटेड के नकदी प्रवाह पर दबाव बढ़ सकता है। हालांकि, सरकारी समर्थन के कारण उनकी रेटिंग को सहारा मिलता रहेगा। यदि व्यवधान लंबा खिंचता है तो सरकार पहले की तरह एक बार फिर महंगाई नियंत्रण और कंपनियों की वित्तीय स्थिति के बीच संतुलन बनाने की कोशिश करेगी। पश्चिम एशिया से गैस आपूर्ति प्रभावित होने के कारण सरकार ने रिफाइनरियों को एलपीजी उत्पादन बढ़ाने का निर्देश दिया है। सात मार्च को 14.2 किलोग्राम के घरेलू एलपीजी सिलेंडर की कीमत भी 60 रुपए बढ़ा दी गई। फिच और मूडीज ने कहा कि बाजार मूल्य से कम कीमत पर एलपीजी बेचने से होने वाले नुकसान की भरपाई सरकार बजटीय प्रावधानों के जरिए कर सकती है। इससे पहले वित्त वर्ष 2024-25 के लिए 30,000 करोड़ रुपए के मुआवजे के पैकेज की घोषणा की गई थी, जिसे मासिक किस्तों में जारी किया जा रहा है। रिपोर्ट में कहा गया कि निजी रिफाइनरी संचालित करने वाली रिलायंस इंडस्ट्रीज को कच्चे तेल की ऊंची कीमतों से शुरुआती दौर में इन्वेंट्री लाभ मिल सकता है, लेकिन यदि आपूर्ति बाधित रहती है तो रिफाइनरी संचालन पर दबाव पड़ सकता है।

दिल्ली सरकार का स्पष्टीकरण

राजधानी में एलपीजी और पीएनजी का पर्याप्त भंडार मौजूद

पेट्रोल-डीजल और गैस की आपूर्ति सामान्य, मुख्य सचिव ने समीक्षा बैठक में दिए निर्देश

वैभव न्यूज ■ नई दिल्ली

दिल्ली सरकार ने स्पष्ट किया है कि राष्ट्रीय राजधानी में एल.पी.जी., पेट्रोल, डीजल और पी.एन.जी. की आपूर्ति पूरी तरह सामान्य है और किसी प्रकार की कमी नहीं है। सरकार ने जनता से अपील की है कि गैस आपूर्ति को लेकर फैल रही अफवाहों पर ध्यान न दें और अनावश्यक घबराहट या भंडारण से बचें। बुधवार को दिल्ली के मुख्य सचिव की अध्यक्षता में खाद्य, आपूर्ति एवं उपभोक्ता मामले विभाग, दिल्ली पुलिस, राजस्व विभाग, इन्द्रप्रस्थ गैस लिमिटेड और विभिन्न तेल विपणन कंपनियों के वरिष्ठ अधिकारियों के साथ एक महत्वपूर्ण बैठक आयोजित की गई। बैठक में मध्य-पूर्व एशिया में उत्पन्न युद्ध जैसी परिस्थितियों के कारण एल.पी.जी. गैस की आपूर्ति बाधित होने संबंधी फैल रही अफवाहों की स्थिति की विस्तृत समीक्षा की गई।बैठक में इन्द्रप्रस्थ गैस लिमिटेड के अधिकारियों ने बताया कि भारत सरकार के पेट्रोलियम एवं प्राकृतिक गैस मंत्रालय ने 9 मार्च 2026 को एक आदेश जारी किया है। इस आदेश में प्राथमिकता वाले क्षेत्रों के लिए घरेलू (डोमेस्टिक) पी.एन.जी. और सी.एन.जी. की आपूर्ति, उसके उचित और समान वितरण और उपलब्धता सुनिश्चित करने के लिए आवश्यक दिशा-निर्देश दिए गए हैं। दिल्ली में घरेलू उपयोग के लिए पी.एन.जी. की कोई कमी नहीं है। साथ ही प्राथमिकताओं का पुनः निर्धारण करते हुए औद्योगिक क्षेत्रों में भी लगभग 80 प्रतिशत तक निर्बाध गैस आपूर्ति को नियमित कर दिया गया है।

तेल विपणन कंपनियों के अधिकारियों ने बताया कि दिल्ली में पेट्रोल, डीजल और घरेलू एल.पी.जी. गैस की आपूर्ति पूरी तरह सामान्य है और कंपनियों के पास पर्याप्त भंडार मौजूद है। तेल और गैस की सप्लाई पहले की तरह लगातार मिल रही है। गैस सिलेंडर की बुकिंग अवधि 21 दिन से बढ़ाकर 25 दिन कर दी गई है, लेकिन बुकिंग के बाद औसतन 2 से 3 दिनों के भीतर सिलेंडर उपभोक्ताओं के घर तक पहुंचाया जा रहा है।

बैठक में यह भी बताया गया कि कमर्शियल गैस सिलेंडरों की आपूर्ति के लिए तेल विपणन कंपनियों द्वारा कुछ दिशा-निर्देश निर्धारित किए गए हैं, जिनके तहत शैक्षणिक संस्थानों और अस्पतालों को प्राथमिकता दी जा रही है। कमर्शियल गैस की आपूर्ति को सुचारू बनाए रखने के लिए ऑयल कंपनियां लगातार प्रयासरत हैं। सरकार ने यह भी सुनिश्चित करने के निर्देश दिए हैं कि गैस की किसी भी प्रकार की चोरी या कालाबाजारी पर प्रभावी रोक लगाई जा सके। इस उद्देश्य से दिल्ली पुलिस और राजस्व विभाग के अधिकारियों को विशेष रूप से सतर्क रहने के निर्देश दिए गए हैं। दिल्ली सरकार ने पुनः दोहराया है कि राजधानी में तेल और गैस की आपूर्ति पूरी तरह सुचारू है। आम जनता से अपील की गई है कि एल.पी.जी. गैस की उपलब्धता को लेकर फैल रही अफवाहों पर ध्यान न दें और अनावश्यक घबराहट या भंडारण से बचें।

Virat Vaibhav, Delhi, 12/03/2026
Page No: 5, Size: 15.77cm × 18.84cm

उत्तराखंड सरकार व्यावसायिक उपयोग के लिए लकड़ी उपलब्ध कराने की तैयारी कर रही

वैभव न्यूज ■ देहरादून

पश्चिम एशिया में बढ़ते तनाव और इसके परिणामस्वरूप गैस आपूर्ति में व्यवधान के बीच, उत्तराखंड सरकार ने जरूरत की स्थिति में व्यावसायिक उपयोग के लिए लकड़ी उपलब्ध कराने की तैयारी शुरू कर दी है।

उत्तराखंड के वन मंत्री सुबोध उनियाल ने कहा कि वर्तमान स्थिति संकटपूर्ण है। उन्होंने कहा, कई पश्चिम एशियाई देशों में युद्ध जैसी परिस्थितियां बन रही हैं, इसलिए गैस की कमी की आशंका को नकारा नहीं जा सकता। इस स्थिति से निपटने के लिए उत्तराखंड वन विकास निगम को लकड़ी की उपलब्धता सुनिश्चित करने के निर्देश जारी किए गए हैं ताकि गैस संकट बढ़ने की स्थिति में वाणिज्यिक गतिविधियों में इसका उपयोग वैकल्पिक ईंधन के रूप में किया जा सके।

सरकार ने मंगलवार को एलपीजी उत्पादन, सीएनजी और पाइप लाइन गैस के आवंटन में बदलाव किया है जिसके तहत घरों और परिवहन क्षेत्रों को प्राथमिकता दी जाएगी व अन्य क्षेत्रों में गैस की आपूर्ति को सीमित किया जाएगा।

DJ Rashtriya Sanskaran, Delhi, 12/03/2026
Page No: 11, Size: 69.14cm × 35.03cm

जंग से ऊर्जा बाजार में मचा हाहाकार, तेल और गैस आपूर्ति प्रभावित

संघर्ष का असर ▸ होर्मुज जलडमरूमध्य बंद होने से वैश्विक स्तर पर तेल और एलएनजी आपूर्ति का लगभग 20% प्रभावित

नई दिल्ली, रायटर : पश्चिम एशिया में जारी युद्ध ने वैश्विक ऊर्जा बाजार को झकझोर दिया है। संघर्ष के कारण तेल और प्राकृतिक गैस की आपूर्ति बाधित हो गई है और कई देशों को उत्पादन रोकना या घटाना पड़ा है। दुनिया की सबसे अहम तेल आपूर्ति लाइन माने जाने वाले होर्मुज जलडमरूमध्य से जहाजों की आवाजाही लगभग ठप हो गई है। दुनिया की बड़ी तेल निर्यातक कंपनी सऊदी अरामको ने चेतावनी दी है कि यदि होर्मुज जलडमरूमध्य जल्द नहीं खुला तो वैश्विक तेल बाजार को विनाशकारी परिणाम झेलने पड़ सकते हैं।

उत्पादन पर बड़ा असर: युद्ध के कारण क्षेत्र की कई प्रमुख ऊर्जा परियोजनाएं प्रभावित हुई हैं। सऊदी अरब ने अपनी रास तनुरा रिफाइनरी का संचालन रोक दिया है और उत्पादन में कटौती की है। वहीं अबू धाबी नेशनल आयल कंपनी को ड्रोन हमले के बाद अपनी विशाल रुवैस रिफाइनरी बंद करनी पड़ी। कुवैत ने उत्पादन घटाते हुए 'फोर्स मेज्योर' घोषित कर दिया है, जबकि इराक के दक्षिणी तेल क्षेत्रों में उत्पादन 43 लाख बैरल प्रतिदिन से घटकर करीब 13 लाख बैरल रह गया है। कई तेल कंपनियों ने फोर्स मेज्योर घोषित किया है।

समुद्री परिवहन पर खतरा

होर्मुज जलडमरूमध्य के आसपास कई जहाजों पर हमले हो चुके हैं और अधिकांश टैंकरों ने इस मार्ग से गुजरना बंद कर दिया है। कई समुद्री बीमा कंपनियों ने भी क्षेत्र के लिए युद्ध जोखिम बीमा रद कर दिया है। हालांकि, अमेरिकी राष्ट्रपति डोनाल्ड ट्रंप ने कहा कि अमेरिकी नौसेना टैंकरों को सुरक्षा दे सकती है, लेकिन हमलों के खतरे के कारण अभी तक नौसेना ने ऐसे अनुरोध स्वीकार नहीं किए हैं।

दुनिया भर के उपभोक्ताओं पर पड़ेगा असर

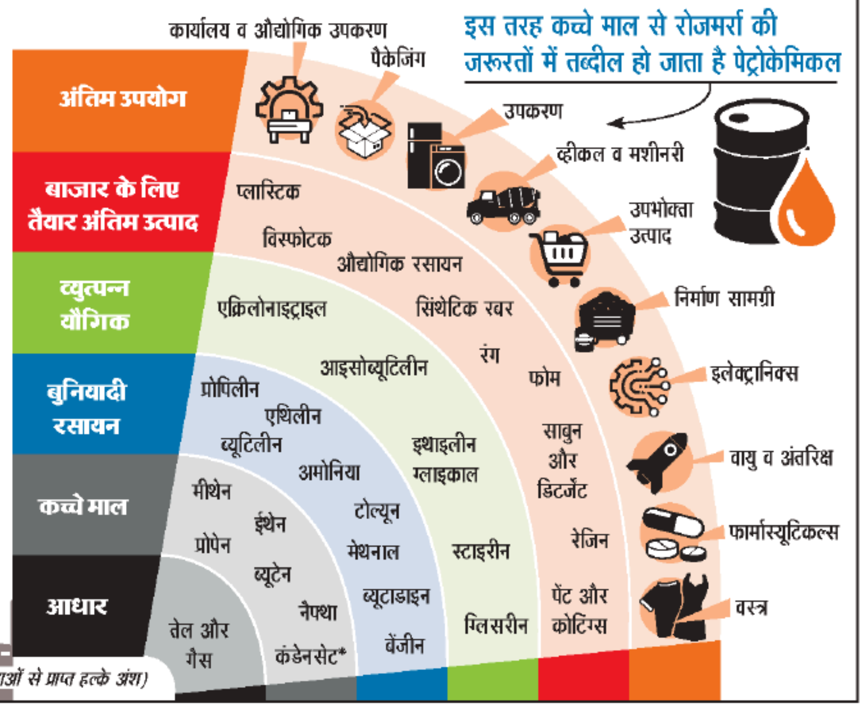
तेल और गैस की आपूर्ति बाधित होने से एशिया की कई रिफाइनरियों और पेट्रोकेमिकल कंपनियों को उत्पादन घटाना पड़ा है। कीमतों में उछाल को देखते हुए दक्षिण कोरिया ने ईंधन कीमतों पर नियंत्रण लगाने का फैसला किया है, जबकि वियतनाम ने ईंधन आयात शुल्क अस्थायी रूप से हटाने की योजना बनाई है। विशेषज्ञों का कहना है कि यदि पश्चिम एशिया में संघर्ष लंबा खिंचा तो ऊर्जा बाजार में और बड़ी उथल-पुथल हो सकती है, जिसका असर दुनिया भर में तेल की कीमतों और महंगाई पर पड़ेगा।

होर्मुज जलडमरूमध्य बंद हुआ तो महंगाई बढ़ने की चेतावनी

इसी बीच संयुक्त राष्ट्र ने चेतावनी दी है कि यदि होर्मुज जलडमरूमध्य बंद होता है तो दुनिया में खाद्य कीमतें और जीवन-यापन की लागत बढ़ सकती है। संयुक्त राष्ट्र की रिपोर्ट के अनुसार यहां से समुद्र के रास्ते होने वाले तेल व्यापार का करीब 25 प्रतिशत गुजरता है, साथ ही एलएनजी व उर्वरक भी भेजे जाते हैं। ऊर्जा व परिवहन लागत जैसे माल ढुलाई, जहाज ईंधन व बीमा बढ़ने से कीमतों पर असर पड़ सकता है।

वैश्विक अर्थव्यवस्था के हर पहलू को प्रभावित करता है कच्चा तेल

पेट्रोलियम (कच्चा तेल) का उपयोग केवल वाहनों में ईंधन भरने तक सीमित नहीं है। यह पानी की बोतल से लेकर, कार के टायरों में लगे रबर, टूथपेस्ट, शैंपू की बोतलें यहां तक की सिंथेटिक कपड़े तक कई वस्तुओं से जुड़ा हुआ है। पेट्रोलियम और प्राकृतिक गैस से प्राप्त रासायनिक उत्पाद, पेट्रोकेमिकल्स कच्चे प्लास्टिक से लेकर फार्मास्यूटिकल्स तक, लगभग 95 प्रतिशत निर्मित वस्तुओं का आधार है। यह परिवर्तन की प्रक्रिया बुनियादी कच्चे माल से शुरू होकर उपभोक्ता उत्पादों में अंतिम उपयोग तक पहुंचती है, जो वैश्विक अर्थव्यवस्था के लगभग हर पहलू को प्रभावित करती है।



*(रिफाइनिंग प्रक्रियाओं से प्राप्त हल्के अंश)

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आपातकालीन तेल भंडार निकासी पर आईईए राजी

बर्लिन,एजेंसी। अंतरराष्ट्रीय ऊर्जा एजेंसी (आईईए) ने बुधवार को आपातकालीन तेल भंडार की सबसे बड़ी मात्रा जारी करने पर सहमति व्यक्त की। इससे पश्चिम एशिया में युद्ध के कारण ऊर्जा बाजारों पर पड़ने वाले प्रभावों का मुकाबला किया जा सकेगा।

पेरिस स्थित संगठन ने कहा कि वह अपने सदस्यों के आपातकालीन भंडार से 40 करोड़ बैरल तेल उपलब्ध कराएगा, जो उसके द्वारा जारी अब तक की सबसे बड़ी मात्रा है। यह भंडार 18.27 करोड़ बैरल से कहीं अधिक है, जिसे 2022 में आईईए के 32 सदस्य देशों ने रूस द्वारा यूक्रेन पर आक्रमण के बाद उपजी स्थिति में जारी किया था।

आईईए के कार्यकारी निदेशक फातिह बिरोल ने कहा कि बाजार तक पर्याप्त पहुंच मार्गों की कमी और भंडारण क्षमता के अभाव में मध्य पूर्व के तेल उत्पादकों ने उत्पादन कम करना शुरू कर दिया है। ऊर्जा और ऊर्जा से संबंधित बुनियादी ढांचे पर हमले और नुकसान भी बढ़ गए हैं। इसका विशेष रूप से जेट ईंधन और डीजल की आपूर्ति पर गंभीर प्रभाव पड़ा है।

भारत ने आईईए के निर्णय का स्वागत किया

नई दिल्ली। वि.सं.। भारत ने कच्चे तेल और गैस की मौजूदा सप्लाई रुकावटों के बीच इंटरनेशनल एनर्जी एजेंसी के इमरजेंसी ऑयल स्टॉक जारी करने के फैसले का स्वागत करता है। सरकार का कहना है कि भारत अंतरराष्ट्रीय ऊर्जा एजेंसी की कोशिशों के साथ ग्लोबल मार्केट स्टेबिलिटी को सपोर्ट करने और जरूरत पड़ने पर सही कदम उठाने के लिए तैयार है। दरअसल, आईईए के 32 सदस्य देशों ने मिलकर 400 मिलियन बैरल तेल बाजार में उपलब्ध कराने पर सहमति जताई है, ताकि सप्लाई में बाधा कम हो सके।

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तैयारी : सरकार ने कहा, रिफाइनरियों ने उत्पादन में 25% तक बढ़ोतरी की

हालात संभालने को गैस का उत्पादन और बढ़ाया

मध्यपूर्व में जंग (12वां दिन)

नई दिल्ली, विशेष संवाददाता। पश्चिम एशिया में जारी संकट के बीच सरकार ने देशवासियों से घबराकर ज्यादा बुकिंग या गैस का स्टॉक जमा नहीं करने की अपील की है। सरकार का दावा है कि कच्चे तेल और रसोई गैस की कोई कमी नहीं है। एलपीजी उत्पादन में 25 फीसदी की वृद्धि हुई है।

पेट्रोलियम मंत्रालय में संयुक्त सचिव सुजाता शर्मा ने बताया कि मांग के मुताबिक आपूर्ति के लिए पर्याप्त भंडार उपलब्ध है। रिफाइनरियों को एलपीजी उत्पादन बढ़ाने के निर्देश देने के बाद घरेलू एलपीजी उत्पादन में 25% वृद्धि हुई है। भारत में गैस की कुल खपत 189 मिलियन मीट्रिक स्टैंडर्ड क्यूबिक मीटर प्रतिदिन (एमएमएससीएमडी) है। इसमें से घरेलू उत्पादन 97.5 एमएमएससीएमडी है, जबकि शेष आयात की जाती है। सरकार ने स्पष्ट किया कि रसोई गैस सिलेंडर की बुकिंग के ढाई दिन के भीतर आपूर्ति सुनिश्चित करने का प्रयास किया जा रहा है।

कच्चे तेल की आपूर्ति सामान्य: संयुक्त सचिव ने कहा कि देश में कच्चे तेल की आपूर्ति पूरी तरह से सामान्य है। तेल कंपनियों ने अलग-अलग देशों से कई क्रूड कार्गो सुनिश्चित किए हैं। अभी भारत 75 फीसदी कच्चा तेल स्ट्रेट ऑफ होर्मुज के अलावा अन्य समुद्री रास्तों से आयात कर रहा है। उन्होंने बताया कि इससे पहले करीब 45 फीसदी आयात स्ट्रेट ऑफ होर्मुज से होकर आता था।

होर्मुज में 28 पोत: सरकार के मुताबिक स्ट्रेट ऑफ होर्मुज में भारत के 28 पोत हैं। इनमें से 24 पोत पश्चिमी हिस्से में हैं, जिन पर 677 भारतीय नाविक हैं। चार पोत पूर्वी हिस्से में हैं, जिन पर 111 भारतीय नाविक मौजूद हैं। › संबंधित खबरें P02, 09

कर्नाटक के चिकमंगलूर में बुधवार को गैस सिलेंडर के लिए जुटे लोग।

निर्देश: राज्य नियम तोड़ने वालों पर कड़ी कार्रवाई करें

गैस किल्लत की आशंकाओं के मद्देनजर केंद्रीय गृह सचिव ने बुधवार को सभी राज्यों के मुख्य सचिवों तथा पुलिस महानिदेशकों (डीजीपी) के साथ बैठक की। इस दौरान सलाह दी गई कि वे एलपीजी आपूर्ति सुनिश्चित करें और कर्मचारियों की सुरक्षा बढ़ाएं। राज्यों को स्थानीय स्तर पर एलपीजी आपूर्ति की निगरानी करने, नियमों का उल्लंघन करने वालों पर कड़ी कार्रवाई करने के भी निर्देश दिए गए। बैठक के दौरान अधिकारियों को यह भी बताया गया कि रिफाइनरियों और पेट्रो कंपनियों को एलपीजी उत्पादन अधिकतम करने और घरेलू उपभोक्ताओं के लिए एलपीजी आपूर्ति को प्राथमिकता देने के निर्देश दिए हैं।

2.5 दिन में गैस सिलेंडर की आपूर्ति की जा रही बुकिंग के बाद

संसद में जमकर हंगामा

पश्चिमी एशिया संकट और देश में रसोई गैस की किल्लत को लेकर विपक्ष ने संसद के अंदर और बाहर प्रदर्शन किया। लोकसभा में विपक्षी सांसद इस मुद्दे पर नारेबाजी करते हुए अध्यक्ष के आसन के करीब आ गए। विपक्षी सदस्य एलपीजी की किल्लत को लेकर नारे लगा रहे थे। › P06

पोत पर ईरान का हमला

ईरान ने बुधवार को होर्मुज जलमार्ग से भारत आ रहे थाईलैंड के कार्गो पोत मयूरी नारी पर मिसाइल से हमला किया। इस हमले में पोत पर सवार क्रू के तीन सदस्य लापता हैं, जबकि 20 अन्य को ओमान की रॉयल नेवी ने बचा लिया। ओमान में भी एक पोत पर हमला हुआ है। › P08

@02 AM

- ट्रंप बोले, बारूदी सुरंग बिछाने वाले ईरान के 28 पोत नष्ट किए
- ईरान ने क्षेत्रीय मध्यस्थों के जरिए संघर्ष विराम के लिए शर्तें रखीं

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200 डॉलर प्रति बैरल हो सकता है तेल

चेतावनी

- मध्य पूर्व संकट के बीच ईरान ने दुनिया का आगाह किया
- कहा, कीमत क्षेत्रीय सुरक्षा पर निर्भर, आपने इसे अस्थिर किया

दुबई/तेल अवीव, एजेंसी। ईरान ने बुधवार को कहा कि दुनिया को 200 डॉलर प्रति बैरल तेल की कीमत के लिए तैयार रहना चाहिए। ईरान के सैन्य कमान के प्रवक्ता इब्राहिम जोल्फकारी ने अमेरिका को संबोधित करते हुए कहा कि तेल के 200 डॉलर प्रति बैरल होने के लिए तैयार हो जाइए, क्योंकि तेल की कीमत क्षेत्रीय सुरक्षा पर निर्भर करती है, जिसे आपने अस्थिर कर दिया है।

ईरान ने इजरायल और पूरे मध्य पूर्व में कई ठिकानों पर हमले किए। यह इस बात का सबूत है कि पेंटागन द्वारा अब तक के सबसे भीषण अमेरिकी-इजरायली हवाई हमलों के बावजूद ईरान अब भी पलटवार करने की क्षमता रखता है। हालांकि, जमीनी स्तर पर हमलों में कोई कमी नहीं आई है और न ही ऐसा कोई संकेत मिला है कि जहाज 'होर्मुज जलडमरूमध्य' से सुरक्षित गुजर सकते हैं। दुनिया का पांचवां हिस्सा तेल इसी संकरे रास्ते में फंसा हुआ है। यह 1970 के दशक के तेल झटकों के बाद ऊर्जा आपूर्ति में सबसे बड़ी बाधा है।

ईरान का इरादा, आर्थिक झटके को लंबा खींचना : ईरानी अधिकारियों ने बुधवार को स्पष्ट किया कि वे युद्ध जारी रहने के साथ लंबे आर्थिक झटके की योजना बना रहे हैं। युद्ध जितना लंबा चलेगा, वैश्विक अर्थव्यवस्था के लिए उतना ही बड़ा खतरा पैदा होगा। ईरान ने कहा कि वह लंबे युद्ध के लिए तैयार है जो विश्व अर्थव्यवस्था को नष्ट कर देगा। ईरान के पुलिस प्रमुख अहमदरेजा ने चेताया सड़कों पर उतरने वाले किसी भी व्यक्ति के साथ प्रदर्शनकारी नहीं, बल्कि दुश्मन जैसा व्यवहार होगा।

कर्मियों को निकालना शुरू: ईरान के रिवोल्यूशनरी गार्ड ने अमेरिका और इजरायली हितों से जुड़े आर्थिक केंद्रों और बैंकों को निशाना बनाने की कसम खाई, जिसके बाद अधिक अंतरराष्ट्रीय कंपनियों ने दुबई से अपने कर्मचारियों को निकालना शुरू कर दिया है। ईरान ने खाड़ी में अमेरिकी सहयोगियों को निशाना बनाकर आर्थिक प्रभाव को और बढ़ा दिया है।

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जयशंकर ने रूस से तेल आपूर्ति पर बातचीत की

नई दिल्ली, एजेंसी। विदेश मंत्री एस. जयशंकर ने बुधवार को रूस के विदेश मंत्री सर्गेई लावरोव और यूरोपीय संघ की विदेश नीति प्रमुख काजा कैलास से बात की। संघर्ष के कारण तेल आपूर्ति अस्थिर होने के बीच यह बातचीत हुई है। बातचीत का मुख्य फोकस संकट के परिणामों से निपटने पर था।

ईरान द्वारा होर्मुज जलडमरूमध्य को बंद करने के बाद दुनियाभर में तेल और गैस की कीमतों में उछाल आया है। जयशंकर ने सोशल मीडिया पर कहा कि रूस के विदेश मंत्री सर्गेई लावरोव के साथ अच्छी बातचीत हुई।

भारत की रूस से कच्चे तेल खरीद 50 प्रतिशत बढ़ी : भारत की रूस से कच्चे तेल की खरीद में मार्च में 50 प्रतिशत की वृद्धि हुई है। पश्चिम एशिया में बढ़ते सैन्य संघर्ष के कारण तेल आपूर्ति बाधित होने के बीच भारत के वैकल्पिक स्रोतों के उपयोग के परिणामस्वरूप यह खरीद बढ़ी है।

गोर ने भारत की भूमिका को सराहा

भारत में अमेरिका के राजदूत सर्जियो गोर ने बुधवार को वैश्विक तेल बाजारों को स्थिर करने में भारत की भूमिका की प्रशंसा की है। उन्होंने जोर देते हुए कहा कि लाभ के लिए बाजार की स्थिरता के मद्देनजर दोनों देशों को कंधे से कंधा मिलाकर काम करने की आवश्यकता है। गोर ने कहा कि दुनिया भर में तेल की कीमतों को स्थिर बनाये रखने में भारत एक बेहतरीन साझेदार रहा है।

Hindustan, Delhi, 12/03/2026
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अमेरिका में रिफाइनरी लगाएगी रिलायंस: ट्रंप

ऐलान

वॉशिंगटन/नई दिल्ली, एजेंसी। अमेरिका के राष्ट्रपति डोनाल्ड ट्रंप ने कहा, भारतीय उद्योगपति मुकेश अंबानी की रिलायंस इंडस्ट्रीज अमेरिका में तेल रिफाइनरी के निर्माण में भागीदार होगी। उन्होंने इसे अमेरिकी इतिहास की सबसे बड़ी रिफाइनरी बताया है।

इस परियोजना का संचालन कर रही कंपनी अमेरिका फर्स्ट रिफाइनिंग के अनुसार, नई रिफाइनरी टेक्सास के ब्राउनस्विले में स्थित होगी और इसे पूरी तरह से अमेरिकी 'शेल' तेल पर चलने के लिए तैयार किया जाएगा।

ऐतिहासिक समझौता बताया : डोनाल्ड ट्रंप ने सोशल मीडिया पर मंगलवार को एक संदेश में इसे '300 अरब अमेरिकी डॉलर का ऐतिहासिक समझौता' बताते हुए कहा कि यह परियोजना उनके प्रशासन के अमेरिका फर्स्ट एजेंडा के कारण संभव हो रही है। इस परियोजना का अमेरिका को बहुत ही लाभ मिलेगा। हालांकि, रिलायंस कंपनी के वरिष्ठ अधिकारियों की ओर से इस समझौते को लेकर अभी तक कोई टिप्पणी नहीं की गई है।

20 साल के लिए करार

अमेरिका फर्स्ट रिफाइनिंग की तरफ से जारी बयान के मुताबिक, कंपनी इस वर्ष की दूसरी तिमाही में प्रोजेक्ट का जमीनी स्तर पर काम शुरू करने की योजना बना रही है। कंपनी ने प्रोसेस फ्यूल की बिक्री के लिए रिलायंस से 20 साल का करार किया है।

Dainik Jagran, Delhi, 12/03/2026
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ऊर्जा बाजार की स्थिति बिगाड़ता युद्ध

आदित्य सिन्हा

ईरान और इजरायल-अमेरिका के बीच छिड़ी लड़ाई अगर जल्द थम भी गई तो भी कुछ समय तक तो उसके दुष्प्रभाव कायम ही रहेंगे

ईरान पर इजरायल और अमेरिका के हमले के बीच होर्मुज जलमार्ग सुर्खियों में बना हुआ है। यह स्वाभाविक है, क्योंकि विश्व के लगभग 20 प्रतिशत तेल एवं गैस की आपूर्ति इसके जरिये होती है। ईरान और ओमान के बीच एक स्थान पर महज 33 किलोमीटर संकरा यह जलमार्ग पश्चिम एशिया में छिड़े महासंग्राम के बाद से ही गतिरोध का शिकार बना हुआ है। इस अहम जलमार्ग के अवरुद्ध होने का खामियाजा पूरी दुनिया को भुगतना पड़ रहा है, जिससे भारत भी अछूता नहीं है।

युद्ध की आग ने तेल की कीमतों पर असर दिखाना शुरू कर दिया है। इस साल की शुरुआत में कच्चे तेल की कीमतें अंतरराष्ट्रीय बाजार में 60 डालर प्रति बैरल के स्तर पर थीं। ये कीमतें सोमवार को एक समय करीब 120 डालर प्रति बैरल तक पहुंच गईं। यानी दो महीने में कीमतें लगभग दोगुनी हो गई हैं। इससे पहले तेल की कीमतों में ऐसी उछाल जून 2022 में रूस-यूक्रेन युद्ध शुरू होने के कुछ महीनों बाद देखी गई थी। तेल की कीमतों में आई हालिया तेजी का स्पष्ट कारण होर्मुज के आसपास बने हालात हैं, क्योंकि यहां से रोजाना लगभग एक से 1.1 करोड़ बैरल कच्चे तेल की आवाजाही होती है। इराक, कुवैत और संयुक्त अरब अमीरात यानी यूएई ने अपना उत्पादन बंद कर दिया है, क्योंकि वे अपने उत्पादों को बाहर भेजने में सक्षम ही नहीं हो पा रहे। इस कारण विश्व की सबसे बड़ी तेल कंपनी अरामको को भी अपनी रणनीति बदलनी पड़ी है। सऊदी अरब की इस कंपनी ने अपने तेल की बिक्री के लिए लाल सागर स्थित बंदरगाह यानबू का सहारा लिया है। इसके बावजूद वह केवल 50 लाख बैरल तेल की आपूर्ति ही कर पा रही है, जबकि सामान्य दिनों वह 70 लाख बैरल तेल की आपूर्ति करती है। कुल मिलाकर, इस समय वैश्विक तेल आपूर्ति के 20 प्रतिशत हिस्से पर गतिरोध का ग्रहण लगा हुआ है। सोमवार को तेल की कीमतों में आई तेजी पर मंगलवार को तब कुछ विराम लगा, जब अमेरिकी राष्ट्रपति ने यह संकेत दिए कि यह लड़ाई ज्यादा लंबी नहीं चलेगी। हालांकि बाजार और विश्लेषक उनके दावों से आश्वस्त नहीं। उन्हें तब तक आश्वस्ति मिलने से रही, जब तक तेल ढुलाई वाले जहाजों की होर्मुज से सुगम आवाजाही सुनिश्चित नहीं हो जाती।

वर्तमान परिस्थितियों में विश्लेषकों को दो परिदृश्य नजर आ रहे हैं। अगर यह युद्ध जल्द समाप्त हो जाता है तो तेल की कीमतें 65 डालर प्रति बैरल के दायरे में आ सकती हैं। इसके उलट अगर लड़ाई लंबी खिंची और ऊर्जा से जुड़े बुनियादी ढांचे को गंभीर क्षति पहुंचती है तो अगले छह महीनों में कच्चे तेल की कीमतें 150 डालर प्रति बैरल तक पहुंच सकती हैं। बहुत आशावादी दृष्टिकोण भी यही कहता है कि इस पूरे साल भर कच्चा तेल 75 से 80 डालर प्रति बैरल के बीच दिखाई पड़ सकता है, जो उसका इस साल की शुरुआत से ऊंचा स्तर ही होगा। भारत के लिए यह बहुत असहज स्थिति होगी, क्योंकि आवश्यकता का 85 प्रतिशत तेल उसे आयात करना पड़ता है। कच्चे तेल में प्रति बैरल 10 डालर बढ़ोतरी का अर्थ होगा आयात पर खर्च में 12 से 15 अरब डालर का बोझ। इससे पेट्रोल, डीजल और रसोई गैस की कीमतें बढ़ेंगी। इसका असर परिवहन, विनिर्माण और खाद्य तंत्र पर पड़ेगा। महंगाई बढ़ेगी और रिजर्व बैंक के लिए ब्याज दरें घटाने की गुंजाइश घटेगी।

अवधेश राजपूत

तेल की चर्चा के बीच एलएनजी गैस के मुद्दे को भी अनदेखा नहीं किया जा सकता, जिसे लेकर खतरे की आहट सुनाई पड़ रही है। कतर का रास लफ्फान संयंत्र विश्व में एलएनजी निर्यात का सबसे बड़ा केंद्र है, जो ड्रोन हमले के बाद से ही ठप पड़ा है। विश्व की कुल एलएनजी के 20 प्रतिशत की आपूर्ति अकेले कतर से होती है। इसमें अबूधाबी के गतिरोध को भी शामिल कर लिया जाए तो वैश्विक बाजार से एलएनजी की भारी खेप गायब हो गई। इसका असर भी दिखने लगा है। सर्दियां बीतने के बाद यूरोप को एनएलजी स्टोरेज के लिए उसकी बड़ी आवश्यकता है तो एशिया में गर्मियों की दस्तक के साथ ही एयर-कंडीशनर की मांग बढ़ने वाली है। बदले हालात में एक सप्ताह के भीतर ही गैस आयात में 26 प्रतिशत की कमी देखने को मिली है। अब सवाल उठ रहा है कि क्या गैस के मोर्चे पर इस किल्लत को अमेरिका और आस्ट्रेलिया दूर करने की स्थिति में हैं? ये दोनों ही देश अपनी पूरी क्षमताओं के साथ आपूर्ति में जुटे हैं, पर उससे शायद हल न निकले। मार्गन स्टैनली के अनुसार यदि महीने भर में कतर में बना गतिरोध दूर नहीं हुआ तो वैश्विक गैस आपूर्ति चरमराने वाली है।

शेयर बाजार भी इस घटनाक्रम की मार झेल रहे हैं। तेल के चढ़ने पर बाजार गिरावट का शिकार होते ही रहे हैं तो इस बार भी स्थिति अलग नहीं है। इस युद्ध की शुरुआत के बाद से ही भारत का सेंसेक्स भी करीब 5,100 अंकों की गिरावट झेल चुका है। गत 9 मार्च को ही अमेरिका के एसएंडपी में 1.3 प्रतिशत की गिरावट दर्ज की गई। दुनिया भर के बाजारों में भी गिरावट का रुझान है। इसका कारण एकदम स्पष्ट है कि तेल की ऊंची कीमतें विमानन कंपनियों, फैक्ट्रियों से लेकर ढुलाई और किसानों का खर्चा बढ़ाने वाली हैं। ऊंची लागत यानी कम मुनाफा। कम मुनाफा यानी शेयर की कीमतों पर असर। खासतौर से भारत के संदर्भ में देखा जाए तो कच्चे तेल की कीतमें ऐतिहासिक रूप से शेयर बाजार के व्युत्क्रमानुपाती रही हैं।

राहत की बात है कि अतीत में भी युद्ध, महामारी और वित्तीय मंदी जैसे संकटों के बाद भी बाजार ने वापसी की है। विश्लेषकों की भी यही सलाह है कि आपाधापी में निवेश परिसंपत्तियों से बाहर न निकलें। एसआइपी में निवेश प्रवाह का 20,000 करोड़ रुपये प्रति माह के स्तर पर बने रहना भी दर्शाता है कि कुछ धैर्य दिखाया जा रहा है। इस संकट में भी बैंकिंग, फार्मा, डिफेंस और टेलीकाम जैसे सेक्टर चमकने में सफल हो सकते हैं। अभी यह कहना मुश्किल है कि यह लड़ाई कितनी लंबी चलेगी। यदि लड़ाई जल्द ही थम भी गई तो कुछ समय तक तो उसके दुष्प्रभाव कायम ही रहेंगे। होर्मुज जलमार्ग में पहले भी गतिरोध दिखा है, लेकिन वह इतना लंबा कभी नहीं खिंचा। दुनिया की नजरें इसी पर टिकी हैं कि ऐसा कौन सा दबाव बनता है जो इसे जल्द से जल्द खोलने में कारगर साबित हो सके।

(लेखक लोकनीति विश्लेषक हैं)
response@jagran.com

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संकट के बीच आईईए जारी करेगा 40 करोड़ बैरल तेल

पेरिस, रायटर : अमेरिका-इजरायल और ईरान के बीच बढ़ते युद्ध के कारण कच्चे तेल की कीमतों में आए उछाल को नियंत्रित करने के लिए अंतरराष्ट्रीय ऊर्जा एजेंसी (आईईए) ऐतिहासिक कदम उठाने जा रही है। आईईए अपने रणनीतिक भंडार से 40 करोड़ बैरल तेल जारी करने पर सहमत हो गया है। यह आईईए के इतिहास की अब तक की सबसे बड़ी आपातकालीन रिलीज होगी, जो 2022 में रूस-यूक्रेन युद्ध के दौरान जारी किए गए 18.27 करोड़ बैरल से दोगुनी से भी अधिक है। यह निर्णय फ्रांस की अध्यक्षता में होने वाली जी-7 (कनाडा, अमेरिका, फ्रांस, इटली, जापान, जर्मनी और ब्रिटेन) नेताओं की बैठक से ठीक पहले लिया गया है।

भारत सरकार ने बुधवार को कहा कि वह आईईए के निर्णय का स्वागत करती है। पेट्रोलियम और प्राकृतिक गैस मंत्रालय ने एक बयान में कहा, 'अंतरराष्ट्रीय ऊर्जा एजेंसी के प्रयासों के अनुरूप वैश्विक बाजार में स्थिरता का समर्थन करने के लिए भारत आवश्यकतानुसार उचित उपाय करने के लिए तैयार है।' इस निर्णय को 32 सदस्य देशों ने सर्वसम्मति से समर्थन दिया है, जो 1974 में आईईए की स्थापना के बाद से उठाया गया छठा ऐसा कदम है। जर्मनी की वित्त मंत्री कैथरीना रीच ने इस आंकड़े की पुष्टि करते हुए कहा कि इसमें जर्मनी 1.95 करोड़ बैरल तेल का योगदान देगा। साथ ही, अमेरिका और जापान की हिस्सेदारी सबसे प्रमुख होगी।

आपूर्ति में बाधा और बाजार की आशंकाएं : होर्मुज में तनाव चरम पर है। हाल ही में अज्ञात मिसाइलों द्वारा तीन और जहाजों को निशाना बनाया गया है, जिससे संघर्ष की शुरुआत से अब तक कुल 14 जहाज क्षतिग्रस्त हो चुके हैं। इस महत्वपूर्ण समुद्री मार्ग के अवरुद्ध होने से प्रतिदिन लगभग दो करोड़ बैरल तेल की आपूर्ति प्रभावित हो रही है। विशेषज्ञों का मानना है कि आईईए द्वारा प्रतिदिन जारी होने वाला लगभग 30.3 से 60.6 लाख बैरल तेल इस बड़े व्यवधान की तुलना में काफी कम है, यही कारण है कि बाजार में तेल की कीमतों में फिर से उछाल देखा जा रहा है।

आईईए की इस योजना को दो से तीन महीनों की अवधि में लागू किया जाएगा। जापान ने औपचारिक घोषणा से पहले ही अपने निजी और सरकारी भंडार से तेल जारी करने की पहल कर दी है। स्पेन की ऊर्जा मंत्री सारा आगेसेन ने इसे ''इतिहास का सबसे बड़ा प्रस्ताव'' करार दिया है। हालांकि, किसी भी भौतिक कमी से बचने के लिए अभी देशों के बीच आवंटन पर चर्चा होनी बाकी है। आईईए सचिवालय योजना में भारत और चीन जैसे गैर-सदस्य देशों को भी शामिल करने पर विचार कर रहा है।

> मुझे लगता है कि हम दुनिया पर जबरदस्त प्रभाव डाल रहे हैं।
> – **डोनाल्ड ट्रंप**, राष्ट्रपति, अमेरिका

> यह होर्मुज जलडमरूमध्य से निर्यात होने वाली मात्रा के 20 दिनों के बराबर है। मुझे लगता है कि वैश्विक उत्पादन बढ़ाने के लिए हम जो कुछ भी कर सकते हैं, उसे देखना बहुत महत्वपूर्ण है।
> – **इमैनुएल मैक्रों**, राष्ट्रपति, फ्रांस

> समन्वित अंतरराष्ट्रीय भंडार जारी करने के लिए आईईए की औपचारिक मंजूरी का इंतजार करने के बजाय, जापान वैश्विक ऊर्जा बाजार में आपूर्ति और मांग को संतुलित करने के लिए पहले कदम उठाएगा और इस महीने की 16 तारीख से ही तेल जारी करेगा
> – **सनाए ताकाइची**, प्रधानमंत्री, जापान

> तेल बाजार में हम जिन चुनौतियों का सामना कर रहे हैं, वे अभूतपूर्व पैमाने की हैं। इसलिए मुझे बहुत खुशी है कि आईईए सदस्य देशों ने आपातकालीन सामूहिक कार्रवाई के साथ अभूतपूर्व जवाब दिया है।
> – **फातिह बिरोल**, कार्यकारी निदेशक, आईईए

ऊर्जा बाजार में हाहाकार, आपूर्ति प्रभावित

- **होर्मुज जलडमरूमध्य बंद होने से वैश्विक तेल व एलएनजी आपूर्ति का लगभग 20% प्रभावित**
- **रिफाइनरियां बंद, टैंकरों पर हमले और बीमा रद्द, दुनिया में महंगाई का खतरा मंडराया**

नई दिल्ली, रायटर : पश्चिम एशिया में जारी युद्ध ने वैश्विक ऊर्जा बाजार को झकझोर दिया है। संघर्ष के कारण तेल और प्राकृतिक गैस की आपूर्ति बाधित हो गई है और कई देशों को उत्पादन रोकना या घटाना पड़ा है। दुनिया की सबसे अहम तेल आपूर्ति लाइन माने जाने वाले होर्मुज जलडमरूमध्य से जहाजों की आवाजाही लगभग ठप हो गई है। इस मार्ग से दुनिया के कुल तेल और एलएनजी आपूर्ति का करीब 20% गुजरता है। दुनिया की सबसे बड़ी तेल निर्यातक कंपनी सऊदी अरामको ने चेतावनी दी है कि यदि होर्मुज जल्द नहीं खुला तो वैश्विक तेल बाजार को विनाशकारी परिणाम झेलने पड़ सकते हैं।

उत्पादन पर बड़ा असर: युद्ध के कारण क्षेत्र की कई प्रमुख ऊर्जा परियोजनाएं प्रभावित हुई हैं। सऊदी अरब ने अपनी रास तनुरा रिफाइनरी का संचालन रोक दिया है और उत्पादन में कटौती की है। वहीं अबू धाबी नेशनल आयल कंपनी को ड्रोन हमले के बाद अपनी विशाल रुवैस रिफाइनरी बंद करनी पड़ी।

कुवैत ने उत्पादन घटाते हुए 'फोर्स मेज्योर' घोषित कर दिया है, जबकि इराक के दक्षिणी तेल क्षेत्रों में उत्पादन 43 लाख बैरल प्रतिदिन से घटकर करीब 13 लाख बैरल रह गया है। दरअसल, पश्चिम एशिया के युद्ध में कई तेल कंपनियों ने फोर्स मेज्योर घोषित किया है, यानी वे अभी तेल या गैस की आपूर्ति करने में सक्षम नहीं हैं क्योंकि हालात उनके नियंत्रण से बाहर हैं। कतर एनर्जी ने भी एलएनजी संयंत्रों का संचालन रोक दिया है, जिससे वैश्विक गैस आपूर्ति पर असर पड़ा है। बहरीन की सित्रा रिफाइनरी पर हमले के बाद ऊर्जा कंपनी ने भी फोर्स मेज्योर घोषित कर दिया है।

इसके अलावा ईरान के मुख्य तेल निर्यात केंद्र खर्ग द्वीप पर भी हमले हुए हैं, हालांकि नुकसान का पूरा आकलन अभी नहीं हो पाया है।

समुद्री परिवहन पर खतरा: होर्मुज जलडमरूमध्य के आसपास कई जहाजों पर हमले हो चुके हैं और अधिकांश टैंकरों ने इस मार्ग से गुजरना बंद कर दिया है। कई समुद्री बीमा कंपनियों ने भी क्षेत्र के लिए युद्ध जोखिम बीमा रद्द कर दिया है।

उपभोक्ताओं पर असर: तेल और गैस की आपूर्ति बाधित होने से एशिया की कई रिफाइनरियों और पेट्रोकेमिकल कंपनियों को उत्पादन घटाना पड़ा है।

घायल हैं सर्वोच्च नेता मोजतबा, ईरान ने कहा– स्वस्थ और सुरक्षित

जागरण न्यूज नेटवर्क, नई दिल्ली: पश्चिम एशिया में जारी युद्ध के बीच ईरान के नए सर्वोच्च नेता मोजतबा खामेनेई की सेहत को लेकर अटकलें तेज हो गई हैं। एक ईरानी अधिकारी ने बताया कि 56 वर्षीय मोजतबा मामूली रूप से घायल हुए थे, लेकिन वह स्वस्थ और सुरक्षित हैं। सर्वोच्च नेता बनने के बाद से वह सार्वजनिक रूप से नजर नहीं आए हैं और न ही उन्होंने कोई भाषण या संदेश जारी किया है।

न्यूयार्क टाइम्स ने तीन ईरानी अधिकारियों के हवाले से बताया कि मोजतबा ईरान पर इजरायल और अमेरिका के हमले के पहले ही दिन यानी 28 फरवरी को घायल हो गए थे। उन्हें पैरों समेत कुछ चोटें आई हैं। हालांकि वह सक्रिय हैं और बेहद सुरक्षा वाले स्थान पर रह रहे हैं। उनके पिता अयातुल्ला अली खामेनेई की उसी दिन अमेरिकी-इजरायली हमले में मौत हो गई थी।

इजरायली हमले के बाद बेरूत के दक्षिणी उपनगर में उठता धुएं का गुबार ● रायटर

गुप्त ठिकाने पर सीमित संपर्क में रहकर संभाल रहे जिम्मेदारी

न्यूयार्क टाइम्स से

न्यूयार्क टाइम्स के अनुसार, मोजतबा अत्यधिक सुरक्षित स्थान से सीमित संपर्क के साथ कामकाज देख रहे हैं। उनके अब तक सार्वजनिक रूप से सामने न आने की एक बड़ी वजह सुरक्षा चिंता भी है। अधिकारियों का कहना है कि किसी भी तरह का वीडियो संदेश या सार्वजनिक बयान उनकी लोकेशन उजागर कर सकता है और उन्हें खतरे में डाल सकता है। ईरान के सरकारी टीवी ने एक प्रसारण में उन्हें घायल युद्ध नायक बताया है।

मोजतबा खामेनेई

तेहरान में लगे पोस्टर : मोजतबा भले ही सार्वजनिक रूप से नजर नहीं आए हैं, लेकिन तेहरान में उनकी तस्वीरों वाले बड़े-बड़े बैनर लगाए गए हैं।

मोजतबा को मिली नोपो 'ब्लैक क्लैड' कमांडो की ढाल: मोजतबा की सुरक्षा के लिए देश की सबसे खास आतंकवाद-रोधी इकाई नोपो को तैनात किया गया है।

नोपो 1991 में बनाया गया था और ईरान पुलिस की सबसे प्रशिक्षित विशेष इकाइयों में माना जाता है। इसका पूरा नाम निरूये विजेह पासदारान वेलायत है, जिसका अर्थ है सर्वोच्च नेता की सुरक्षा के लिए विशेष बल।

विशेषज्ञों के मुताबिक यह इकाई औपचारिक रूप से बंधक बचाव और आतंकवाद-रोधी अभियानों के लिए बनाई गई थी, लेकिन समय के साथ यह विरोध प्रदर्शनों को दबाने में भी सक्रिय रही है।

फ्रांस स्थित विपक्षी संगठन ईरान की राष्ट्रीय प्रतिरोध परिषद के अधिकारी अली सफावी के मुताबिक नोपो की कुल छह ब्रिगेड हैं। इनमें चार तेहरान में, जबकि एक मशहाद और एक इस्फहान में तैनात है। यह इकाई बेहद प्रशिक्षित व अत्याधुनिक हथियारों से लैस है और इसकी निष्ठा सीधे सर्वोच्च नेता के प्रति होती है। सफावी ने दावा किया कि यह बल इस्लामिक रिवोल्यूशनरी गार्ड कोर से भी ज्यादा प्रशिक्षित और घातक माना जाता है।

अब अमेरिका में रिफाइनरी लगाएगी रिलायंस इंडस्ट्रीज

- खुद ट्रंप ने किया एलान, 50 वर्ष बाद अमेरिका में लगाई जा रही नई रिफाइनरी
- रिलायंस इस रिफाइनरी से उत्पादित ईंधन की अगले 20 वर्षों तक खरीदारी भी करेगी

प्रतीकात्मक

वाशिंगटन, प्रेट्र : उद्योगपति मुकेश अंबानी की कंपनी रिलायंस इंडस्ट्रीज अमेरिका में बनने वाली नई तेल रिफाइनरी में निवेश करेगी। अमेरिकी राष्ट्रपति डोनाल्ड ट्रंप ने खुद इसका एलान किया है। यह पिछले 50 वर्षों में अमेरिका में लगाई जाने वाली पहली तेल रिफाइनरी होगी। ट्रंप ने इसे अमेरिकी इतिहास की सबसे बड़ी रिफाइनरी करार दिया है।

इस परियोजना का संचालन कर रही कंपनी 'अमेरिका फर्स्ट रिफाइनिंग' (एएफआर) ने कहा है कि नई रिफाइनरी टेक्सास के ब्राउंसविले में स्थित होगी और इसे पूरी तरह से अमेरिकी शेल तेल पर चलने के लिए डिजाइन किया जाएगा। शेल तेल एक प्रकार का गैर-पारंपरिक ईंधन है, जो शेल नामक अवसादी चट्टानों के भीतर पाया जाता है। रिलायंस इस रिफाइनरी से उत्पादित ईंधन की 20 वर्षों तक खरीदारी भी करेगी। परियोजना का शिलान्यास 2026 की दूसरी तिमाही में होने वाला है।

ट्रंप ने ट्रुथ सोशल पर एक पोस्ट में रिलायंस को इस परियोजना में भागीदार बताया और इसे ऐतिहासिक 300 अरब डालर का सौदा कहा। यह घोषणा ऐसे समय की गई है, जब अमेरिका और इजरायल का ईरान के खिलाफ युद्ध तेल बाजारों को प्रभावित कर रहा है और व्हाइट हाउस ऊर्जा की बढ़ती कीमतों के बारे में चिंता कम करने के तरीके खोज रहा है। रिलायंस ने इस पर तत्काल कोई टिप्पणी नहीं की है।

1977 में लुइसियाना का गैरीविले संयंत्र चालू होने के बाद यह अमेरिका की पहली बड़ी रिफाइनरी होगी। न तो ट्रंप और न ही एएफआर ने परियोजना के वित्तीय विवरण या पूरा होने की समय सीमा के बारे में कोई जानकारी दी है। यह रिलायंस द्वारा अमेरिका में स्थापित की जाने वाली पहली तेल रिफाइनरी होगी। कंपनी गुजरात के जामनगर में दुनिया का सबसे बड़ा रिफाइनिंग संयंत्र चलाती है, जिसकी क्षमता 12.4 करोड़ बैरल कच्चे तेल की रिफाइनिंग करने की है। रिलायंस की अमेरिका में ऊर्जा व्यापार, प्रौद्योगिकी साझेदारी और निवेश के माध्यम से लंबे समय से व्यावसायिक उपस्थिति रही है।

कंपनी ने पहले अमेरिका की शेल गैस कंपनियों में निवेश किया है और वर्तमान में अमेरिका में बड़ी मात्रा में ईंधन बेचती है।

Navodaya Times, Delhi, 12/03/2026
Page No: 4, Size: 50.72cm × 18.68cm

राजधानी में एलपीजी और पीएनजी का पर्याप्त भंडार मौजूद: दिल्ली सरकार

दिल्ली में ईंधन की किल्लत नहीं, सरकार ने अफवाहों पर ध्यान नहीं देने की अपील की

नई दिल्ली, 11 मार्च (नवोदय टाइम्स): दिल्ली सरकार ने साफ किया है कि राष्ट्रीय राजधानी में एलपीजी, पेट्रोल, डीजल और पीएनजी की आपूर्ति पूरी तरह सामान्य है और किसी प्रकार की कमी नहीं है। सरकार ने जनता से अपील की है कि गैस आपूर्ति को लेकर फैल रही अफवाहों पर ध्यान न दें और अनावश्यक घबराहट या भंडारण से बचें। बुधवार को दिल्ली के मुख्य सचिव की अध्यक्षता में खाद्य, आपूर्ति एवं उपभोक्ता मामले विभाग, दिल्ली पुलिस, राजस्व विभाग, इन्द्रप्रस्थ गैस लिमिटेड और विभिन्न तेल विपणन कंपनियों के वरिष्ठ अधिकारियों के साथ बैठक आयोजित की गई।

मुख्य सचिव ने समीक्षा बैठक में दिए निर्देश

बैठक में मध्य-पूर्व एशिया में युद्ध की परिस्थितियों के कारण एलपीजी गैस की आपूर्ति बाधित होने संबंधी फैल रही अफवाहों की स्थिति की विस्तृत समीक्षा की गई।

इस दौरान इन्द्रप्रस्थ गैस लिमिटेड के अधिकारियों ने बताया कि भारत सरकार के पेट्रोलियम एवं प्राकृतिक गैस मंत्रालय ने 9 मार्च 2026 को एक आदेश जारी किया है। इस आदेश में प्राथमिकता वाले क्षेत्रों के लिए घरेलू (डोमेस्टिक) पीएनजी और सीएनजी की आपूर्ति, उसके उचित और समान वितरण और उपलब्धता सुनिश्चित करने के लिए आवश्यक दिशा-निर्देश दिए गए हैं। सरकार ने कहा कि दिल्ली में घरेलू उपयोग के लिए पीएनजी की कोई कमी नहीं है। साथ ही, प्राथमिकताओं का पुन: निर्धारण करते हुए औद्योगिक क्षेत्रों में भी लगभग 80 प्रतिशत तक निर्बाध गैस आपूर्ति को नियमित कर दिया गया है।

कालाबाजारी के खिलाफ अभियान

सरकार ने सुनिश्चित करने के निर्देश दिए हैं कि गैस की किसी भी प्रकार की चोरी या कालाबाजारी पर प्रभावी रोक लगाई जाए। दिल्ली पुलिस और राजस्व विभाग के अधिकारियों को विशेष रूप से सतर्क रहने के निर्देश दिए गए हैं।

सरकार का दावा

- दिल्ली में पेट्रोल, डीजल और घरेलू एल.पी.जी. गैस की आपूर्ति पूरी तरह सामान्य और कंपनियों के पास पर्याप्त भंडार मौजूद है। -तेल और गैस की सप्लाई पहले की तरह लगातार मिल रही है।
- गैस सिलेंडर की बुकिंग अवधि 21 दिन से बढ़ाकर 25 दिन कर दी गई है।
- लेकिन बुकिंग के बाद औसतन 2 से 3 दिनों के भीतर सिलेंडर उपभोक्ताओं के घर तक पहुंचाया जा रहा।
- कमर्शियल सिलेंडरों की आपूर्ति के लिए तेल विपणन कंपनियों द्वारा कुछ दिशा-निर्देश निर्धारित किए गए हैं।
- जिनके तहत शैक्षणिक संस्थानों और अस्पतालों को प्राथमिकता दी जा रही है।
- कमर्शियल गैस की आपूर्ति को सुचारू बनाए रखने के लिए ऑयल कंपनियां लगातार प्रयासरत।

Navbharat Times, Delhi, 12/03/2026
Page No: 10, Size: 13.55cm × 19.42cm

दिल्ली में ईंधन की कोई किल्लत नहीं : सरकार

■ NBT रिपोर्ट, नई दिल्ली

दिल्ली में एलपीजी, पेट्रोल, डीजल और पीएनजी की सप्लाई पूरी तरह से सामान्य है और किसी प्रकार की कमी नहीं है। सरकार ने जनता से अपील की है कि गैस आपूर्ति को लेकर फैल रही अफवाहों पर ध्यान न दें और अनावश्यक घबराहट या भंडारण से बचें। बुधवार को दिल्ली के मुख्य सचिव की अध्यक्षता में खाद्य, आपूर्ति एवं उपभोक्ता मामले विभाग, दिल्ली पुलिस, राजस्व विभाग, इन्द्रप्रस्थ गैस लिमिटेड और विभिन्न तेल कंपनियों के सीनियर अधिकारियों के साथ एक महत्वपूर्ण बैठक हुई।

मुख्य सचिव ने बुधवार को की समीक्षा बैठक

बैठक में इन्द्रप्रस्थ गैस लिमिटेड के अधिकारियों ने बताया कि भारत सरकार के पेट्रोलियम एवं प्राकृतिक गैस मंत्रालय ने 9 मार्च 2026 को एक आदेश जारी किया है। इस आदेश में प्राथमिकता वाले क्षेत्रों के लिए घरेलू (डोमेस्टिक) पीएनजी और सीएनजी की सप्लाई, उसके उचित और समान वितरण और उपलब्धता सुनिश्चित करने के लिए आवश्यक दिशा-निर्देश दिए गए हैं। दिल्ली में घरेलू उपयोग के लिए पीएनजी की कोई कमी नहीं है। साथ ही प्राथमिकताओं का पुनः निर्धारण करते हुए औद्योगिक क्षेत्रों में भी लगभग 80 प्रतिशत तक निर्बाध गैस सप्लाई को नियमित कर दिया गया है।

तेल कंपनियों के अधिकारियों ने बताया कि दिल्ली में पेट्रोल, डीजल और घरेलू एलपीजी गैस की आपूर्ति पूरी तरह से सामान्य है और कंपनियों के पास पर्याप्त भंडार मौजूद है। बुकिंग के बाद औसतन 2 से 3 दिनों के भीतर सिलिंडर घर तक पहुंचाया जा रहा है। बैठक में यह भी बताया गया कि कमर्शल गैस सिलिंडरों की आपूर्ति के लिए तेल कंपनियों द्वारा कुछ दिशा-निर्देश निर्धारित किए गए हैं, जिनके तहत शैक्षणिक संस्थानों और अस्पतालों को प्राथमिकता दी जा रही है।

सरकार ने गैस की किसी भी प्रकार की चोरी या कालाबाजारी पर प्रभावी रोक लगाने के निर्देश दिए हैं। इसके लिए दिल्ली पुलिस और राजस्व विभाग के अधिकारियों को विशेष रूप से सतर्क रहने के निर्देश दिए गए हैं।

मार्च में रूस से तेल की खरीद 50% ज्यादा

■ पीटीआई, नई दिल्ली

भारत की रूस से कच्चे तेल की खरीद में मार्च में 50 प्रतिशत की बढ़ोतरी हुई है। पश्चिम एशिया में बढ़ते सैन्य संघर्ष के कारण तेल आपूर्ति बाधित होने के बीच भारत की ओर से खरीद बढ़ी है। तेल रिफाइनरी कंपनियों ने रूस से लगभग 3 करोड़ बैरल कच्चा तेल खरीदा है।

जहाज निगरानी आंकड़ों के अनुसार, भारत ने इस महीने लगभग 15 लाख बैरल रूसी तेल खरीदा, जो फरवरी में 10.4 लाख बैरल प्रतिदिन था। भारत, विश्व का तीसरा सबसे बड़ा कच्चा तेल आयातक देश है और अपनी तेल जरूरतों का 88 प्रतिशत विदेशों से लेता है। भारत प्रतिदिन 58 लाख बैरल तेल की खपत करता है, जिसमें से 25 से 27 लाख बैरल सऊदी अरब, इराक और संयुक्त अरब अमीरात जैसे पश्चिम एशियाई देशों से होर्मुज जलडमरूमध्य के माध्यम से आता है। संघर्ष के कारण होर्मुज जलडमरूमध्य से जहाजों की आवाजाही लगभग बंद है।

File Photo

साल 2022 से रूस से ज्यादा तेल खरीद रहा था भारत।

खाड़ी के देशों से तेल खरीद रहा था भारत

भारत पिछले साल से अमेरिकी दबाव के कारण रूसी तेल की खरीद कम कर रहा था। उसकी जगह सऊदी अरब और इराक से तेल ले रहा था। पश्चिम एशिया में बढ़ते संघर्ष के कारण वहां से आपूर्ति प्रभावित हो गई। छूट दिए जाने के बाद रूसी तेल खरीदा।

Dainik Bhaskar, Delhi, 12/03/2026

Page No: 1, Size: 23.50cm × 22.86cm

28 लाख करोड़ रु. की ऐतिहासिक डील • टेक्सास में नई रिफाइनरी लगाएगी रिलायंस

अमेरिका के इतिहास की सबसे बड़ी रिफाइनरी के लिए रिलायंस से डील

ट्रम्प ने कहा- रिलायंस अमेरिका में 50 साल में पहली तेल रिफाइनरी बनाने में भागीदार बनेगी

अब आगे क्या? रिफाइनरी का भूमि पूजन इसी साल की दूसरी तिमाही में प्रस्तावित है

भास्कर न्यूज़ | वॉशिंगटन/मुंबई

एक वक्त था जब भारत की अमेरिका से ऊर्जा साझेदारी नगण्य थी। मगर आज अमेरिका अपनी ऊर्जा जरूरत के लिए भारतीय कंपनी को साझेदार बना रहा है। यही इस डील की असली ताकत है। अमेरिकी राष्ट्रपति ट्रम्प ने मंगलवार को घोषणा की कि मुकेश अंबानी की रिलायंस इंडस्ट्रीज अमेरिका में 50 साल में पहली नई तेल रिफाइनरी बनाने में भागीदार बनेगी। यह रिफाइनरी टेक्सास के ब्राउन्सविल में बनेगी और पूरी तरह अमेरिकी शेल तेल पर चलेगी। ट्रम्प ने इसे ट्रुथ सोशल पर '300 अरब डॉलर (27.62 लाख करोड़ रु.) की ऐतिहासिक डील' बताया। हालांकि, यह 20 साल की व्यापारिक गतिविधि का अनुमानित मूल्य है। वास्तविक निर्माण लागत \$4 से \$5 अरब डॉलर (46 हजार करोड़ रु.) होगी। इस रिफाइनरी का भूमि-पूजन इस साल की दूसरी तिमाही में प्रस्तावित है।

इस रिफाइनरी की क्षमता 1.6 लाख बैरल प्रतिदिन होगी। अमेरिका में आखिरी बड़ी रिफाइनरी 1977 में लुइसियाना में बनी थी। वहीं, देर रात तक रिलायंस ने इस डील पर कोई प्रतिक्रिया नहीं दी। विशेषज्ञों के अनुसार, नियामक संबंधी औपचारिकताओं के कारण रिलायंस ने अभी आधिकारिक घोषणा नहीं की है। उधर, बुधवार को सेंसेक्स में 1,342 अंकों की गिरावट आई, जिससे रिलायंस भी नहीं बच सका। रिलायंस इंडस्ट्रीज लिमिटेड का शेयर करीब 1.5% लुढ़क गया।

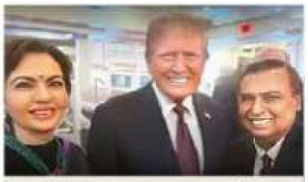
भास्कर एक्सप्लेनर

3 बड़ी ताकत... जिससे रिलायंस को डील मिली

1. जामनगर में 216 अलग-अलग तरह के क्रूड रिफाइन करने की क्षमता मौजूद अमेरिका की समस्या रिफाइन करने में है। रिलायंस जामनगर रिफाइनरी का नेल्सन कॉम्प्लेक्सिटी इंडेक्स 21.1 है, अमेरिकी रिफाइनरी का औसत 10-12 है। जामनगर में 216 तरह के तेल की रिफाइनिंग संभव।

2. रिफाइनरी का सबसे ज्यादा अनुभव गुजरात के जामनगर में स्थित रिलायंस का रिफाइनिंग कॉम्प्लेक्स दुनिया का सबसे बड़ा है, जिसकी क्षमता 12.4 लाख बैरल प्रतिदिन है। रिफाइनरी बनाने और चलाने का सबसे ज्यादा अनुभव रिलायंस को है।

3. अमेरिकी रिफाइनरी सक्षम नहीं हैं अमेरिका में 132 सक्रिय तेल रिफाइनरी हैं, जिनकी संयुक्त क्षमता करीब 1.84 करोड़ बैरल प्रतिदिन है। ये वेनेजुएला और कनाडा जैसे देशों के भारी, उच्च-सल्फर कच्चे तेल को रिफाइन करने के लिए बनी थीं, न कि उस हल्के कच्चे तेल के लिए जो आज अमेरिकी शेल उत्पादन में प्रमुख है।



तस्वीर जनवरी 2025 की है, जब मुकेश व नीता अंबानी ट्रम्प के शपथ ग्रहण समारोह के लिए अमेरिका गए थे।

4 बड़े कारण... जिससे अमेरिका ये न कर सका

'विकसित' संपन्न अमेरिका 50 साल से खुद यह काम क्यों नहीं कर पाया? इसके पीछे ये 4 बड़े कारण जिम्मेदार हैं:

1. **पर्यावरण नियमः** नई रिफाइनरी के लिए परमिट पाने में 10-15 साल लगते हैं।
2. **भारी लागतः** \$4-5 अरब डॉलर का जोखिम उठाने को कोई तैयार नहीं था।
3. **कम मुनाफाः** मार्जिन बहुत कम होता है।
4. **भविष्य का डरः** इलेक्ट्रिक वाहनों के आने से तेल की मांग घटने की आशंका।

वो बड़े लाभ... जो भारत और अमेरिका को होंगे

अमेरिका को ये 3 बड़े फायदे होंगे-

1. **नई रिफाइनिंग क्षमताः** यह नई रिफाइनरी उसकी घरेलू ईंधन आपूर्ति मजबूत करेगी। वैश्विक ऊर्जा बाजार पर पकड़ बढ़ाएगी।
2. **रोजगार के अवसरः** इससे टेक्सास में हजारों प्रत्यक्ष-अप्रत्यक्ष रोजगार पैदा होंगे।
3. **लाइट शेल ऑयल का उपयोगः** अमेरिका के पास 'लाइट शेल ऑयल' का विशाल भंडार है। यह रिफाइनरी विशेष रूप से इसी तेल को प्रोसेस करने के लिए बन रही है।

भारत व रिलायंस के लिए 3 फायदे-

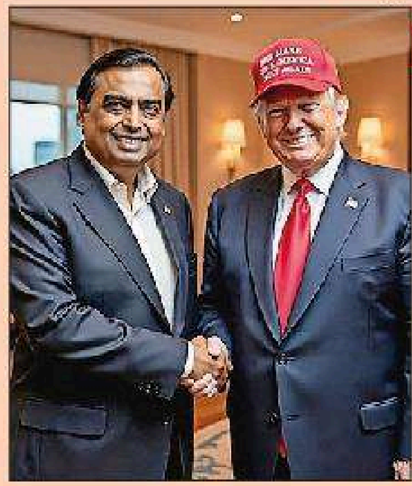
1. **ग्लोबल एनर्जी प्लेयरः** रिलायंस अब केवल एक भारतीय रिफाइनर नहीं, बल्कि एक 'ग्लोबल एनर्जी सुपरपावर' बन जाएगी।
2. **सप्लाई चेन पर नियंत्रणः** दो दशकों तक ईंधन की खरीद, प्रोसेसिंग, बिक्री का पूरा नियंत्रण मिलेगा। इससे राजस्व भी बढ़ेगा।
3. **भू-राजनीतिक लाभः** यह भारत-अमेरिका के बीच रणनीतिक संबंधों को गहरा करेगी। ऊर्जा में इतनी बड़ी साझेदारी भारत को वैश्विक मंच पर भी बड़ी मजबूती देगी।

इस डील में अनंत अंबानी कुछ महीनों से सक्रिय थे

सूत्रों के अनुसार, अमेरिका से हुई इस सबसे बड़ी रिफाइनरी डील में पिछले कुछ महीनों से अनंत अंबानी की सक्रियता अहम रही। मुकेश अंबानी के छोटे बेटे अनंत 1 मई 2025 से रिलायंस इंडस्ट्रीज के एग्जीक्यूटिव डायरेक्टर हैं।

US में 50 साल बाद खुलेगी नई रिफाइनरी, रिलायंस से हुई डील

AI Image



खास बातें

- **बड़ी डील:** 50 साल बाद अमेरिका में पहली बार कोई नई बड़ी रिफाइनरी बनने जा रही है।
- **रिलायंस की एंट्री:** रिलायंस पहली बार अमेरिका के रिफाइनिंग सेक्टर में सीधा निवेश कर रही है।
- **लंबा करार:** रिलायंस ने ईंधन की खरीद के लिए 20 साल का एग्रीमेंट किया है।

पीटीआई, वॉशिंगटन/नई दिल्ली: भारतीय उद्योगपति मुकेश अंबानी की कंपनी रिलायंस इंडस्ट्रीज अमेरिका में नई तेल रिफाइनरी बनाने में पार्टनर बनेगी। अमेरिका के राष्ट्रपति डॉनल्ड ट्रंप ने इसका ऐलान करते हुए इसे अमेरिका के इतिहास की सबसे बड़ी डील बताया है। पिछले 50 सालों में यह अमेरिका की पहली नई बड़ी रिफाइनरी होगी, जो पूरी तरह से अमेरिकी कच्चे तेल (शेल ऑयल) का इस्तेमाल करेगी। रिलायंस ने यहां बनने वाले ईंधन को 20 साल तक खरीदने का करार किया है, जिससे अमेरिका की ऊर्जा सुरक्षा मजबूत होगी। हालांकि रिलायंस की तरफ से अभी इस पर कोई आधिकारिक बयान नहीं आया है।

यह नई रिफाइनरी टेक्सस के ब्राउन्सविले (Brownsville) में लगाई जाएगी। इसे इस तरह डिजाइन किया गया है कि यह पूरी तरह से अमेरिका के ही शेल ऑयल (shale oil) पर चलेगी। इस प्रोजेक्ट को 'अमेरिका फर्स्ट रिफाइनिंग' (AFR) नाम की कंपनी लीड कर रही है।

रिलायंस ने इस रिफाइनरी में बनने वाले फ्यूल को खरीदने के लिए 20 साल का एग्रीमेंट साइन किया है। इस प्रोजेक्ट की शुरुआत 2026 की दूसरी तिमाही (अप्रैल-जून) में होने की उम्मीद है।

ट्रंप ने सोशल मीडिया प्लैटफॉर्म 'ट्रुथ सोशल' पर एक पोस्ट में रिलायंस का नाम लेते हुए इसे 300 बिलियन डॉलर (तकरीबन 25 लाख करोड़ रुपये) की ऐतिहासिक डील कहा। ट्रंप ने कहा कि इससे देश की सुरक्षा मजबूत होगी और अरबों डॉलर का आर्थिक फायदा होगा। हालांकि, AFR कंपनी ने रिलायंस का सीधा नाम लिए बिना कहा कि उन्हें एक बड़ी ग्लोबल कंपनी से भारी-भरकम निवेश मिला है।

एक बार तैयार होने के बाद यह 1977 के बाद अमेरिका में बनने वाली पहली बड़ी तेल रिफाइनरी होगी। यह पहली बार होगा जब रिलायंस अमेरिका में कोई तेल रिफाइनरी बनाएगी। यह ऐलान ऐसे समय में हुआ है जब पश्चिम एशिया में तनाव के कारण तेल बाजार में हलचल है। जिसे लेकर पूरी दुनिया टेंशन में है।

Dainik Bhaskar, Delhi, 12/03/2026
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असर • अमेरिका-ईरान युद्ध से औद्योगिक नगरी में गैस आधारित ईंधन सप्लाई

एलपीजी-पीएनजी व सीएनजी की जुगत में लोग, होटल-रेस्तरां संचालक परेशान

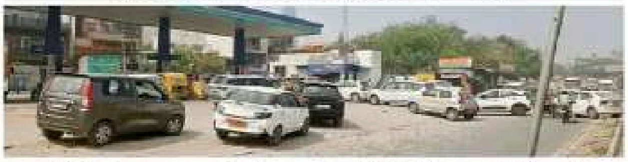
भास्कर न्यूज़ | फरीदाबाद

अमेरिका-ईरान के बीच चल रहे युद्ध का असर अब औद्योगिक नगरी में भी दिखाई देने लगा है। शहर में गैस आधारित ईंधन का संकट गहराने लगा है। एलपीजी, पीएनजी और सीएनजी की आपूर्ति प्रभावित होने से आम लोगों से लेकर उद्योगों और होटल-रेस्तरां कारोबारियों तक सभी परेशान हैं। ये अब गैस आधारित ईंधन की जुगत में जुटे हैं। जिला खाद्य आपूर्ति विभाग के अनुसार फरीदाबाद में करीब सात लाख घरेलू रसोई गैस उपभोक्ता हैं। इन्हें गैस सिलेंडर आपूर्ति के लिए करीब 45 गैस एजेंसी हैं।

शहर में गैस एजेंसियों द्वारा रोज करीब 20 हजार रसोई गैस सिलेंडर की आपूर्ति की जा रही है। उनका कहना है कि मौजूदा समय में घरेलू रसोई गैस आपूर्ति में कोई कठिनाई नहीं हो रही। उपभोक्ताओं को मांग के अनुरूप डिलीवरी मिल रही है। रसोई गैस सिलेंडरों की कोई कमी नहीं है। लेकिन इस सबके बावजूद गैस एजेंसियों के बाहर सिलेंडर के लिए भीड़ बढ़ रही है। सूत्रों के अनुसार रसोई गैस के लिए ऑनलाइन बुकिंग के समय कैश ऑन डिलीवरी नहीं हो रही। एजेंसियां उपभोक्ताओं से बुकिंग के समय अग्रिम भुगतान ले रही हैं।

उद्योगों पर गहराया संकट: फरीदाबाद में करीब 300 उद्योग पीएनजी से चल रहे हैं। फरीदाबाद इंडस्ट्रीज एसोसिएशन (एफआईए) के अध्यक्ष राज भाटिया ने बताया कि इस संकट को गंभीर मानते हुए प्रशासन और संबंधित गैस आपूर्ति कंपनियों को पत्र लिखा गया है। इसमें पीएनजी आधारित उद्योगों के लिए वैकल्पिक ईंधन की व्यवस्था सुनिश्चित करने की मांग की गई है। एफआईए का कहना है अगर जल्द समाधान नहीं निकाला गया तो उत्पादन प्रभावित होगा।

सीएनजी पंप पर वाहनों की भीड़



जानकारी के अनुसार शहर में करीब 16 लाख के आसपास छोटे-बड़े वाहन हैं। इनमें से एक लाख से अधिक वाहन सीएनजी से चलते हैं। ईंधन संकट की आशंका के कारण दो-तीन दिन से सीएनजी पंपों पर वाहनों की भीड़ बढ़ रही है। इसके अलावा फरीदाबाद में रोज करीब पांच लाख लीटर डीजल और ढाई लाख लीटर पेट्रोल की खपत है। डीजल-पेट्रोल वाले वाहन चालकों की भी पेट्रोल पंपों पर भीड़ बढ़ रही है।

जिले में एलपीजी की अभी कोई कमी नहीं है। लोगों को घबराने या अनावश्यक रूप से गैस सिलेंडर जमा करने की आवश्यकता नहीं है। जिले में गैस की सप्लाई पूरी तरह सामान्य है और सभी गैस एजेंसियों पर पर्याप्त मात्रा में सिलेंडर उपलब्ध हैं। जमाखोरों पर कड़ी निगरानी रखी जा रही है। जमाखोरों पर कड़ी कार्रवाई की जाएगी। लोग अफवाह पर ध्यान न दें।

-कविता, जिला खाद्य एवं आपूर्ति नियंत्रक

गेल GAIL

Dainik Bhaskar, Delhi, 12/03/2026

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डिफ्रेंट एंगल • समाधान अधिक ऊर्जा खोजने में नहीं, सही ऊर्जा चुनने और उसके विवेकपूर्ण उपयोग में है...

एनर्जी के लिए दूसरे देशों पर निर्भरता में है कई समस्याओं की जड़

ऊर्जा स्वराज

प्रो. चेतन सिंह सोलंकी
आईआईटी बॉम्बे के पूर्व प्रोफेसर
chetanss@gmail.com

ट्रम्प के निर्णयों से दुनिया को चाहे जो नुकसान हुआ हो, एक फायदा यह हुआ है कि उनसे हमें आधुनिक जीवन की एक खतरनाक कमी को समझने में मदद मिली है। यह है ऊर्जा के उपयोग पर हमारी अत्यधिक निर्भरता, जो आज हमारे स्वास्थ्य, पर्यावरण, अर्थव्यवस्था सभी को नकारात्मक रूप से प्रभावित कर रही है।

ईरान, यूक्रेन और पश्चिम एशिया में बढ़ते संघर्षों के बीच दुनिया फिर से ऊर्जा संकट की चर्चा कर रही है। कच्चे तेल की कीमतें बढ़ रही हैं, आपूर्ति घटाने की घोषणाएं हो रही हैं, कई देशों में ईंधन को लेकर चिंता दिखाई देने लगी है। भारत में भी एलपीजी की आपूर्ति और कीमतों पर दबाव की खबरें सामने आने लगी हैं। हर बार जब ऐसा होता है, हमें याद आता है कि आधुनिक दुनिया कितनी गहराई से ऊर्जा पर निर्भर हो चुकी है।

आज मानव जीवन का लगभग हर कार्य ऊर्जा से संचालित होता है। सुबह उठकर दांत साफ करने से लेकर मोबाइल पर संदेश भेजने तक, खाना पकाने से लेकर यात्रा करने तक- हर गतिविधि के पीछे कहीं न कहीं ऊर्जा का उपयोग छिपा हुआ है, फिर भले वो हमें नजर आए या न आए। आधुनिक अर्थव्यवस्था, उद्योग, परिवहन और संचार- सब ऊर्जा पर आधारित हैं। बिना ऊर्जा के जीवन की कल्पना करना भी मुश्किल है।

समस्या यह है कि आज भी दुनिया की अधिकांश ऊर्जा कार्बन आधारित स्रोतों से आती है- जैसे कोयला, पेट्रोलियम और प्राकृतिक गैस। यह ऊर्जा पृथ्वी पर समान रूप से वितरित नहीं है। कुछ देशों के पास इन संसाधनों का भंडार है, जबकि अधिकांश को अपनी जरूरतों के लिए इनका आयात करना पड़ता है। यही असमान वितरण वैश्विक निर्भरता और असुरक्षा की जड़ है।

जब कोई देश ऊर्जा के लिए दूसरे देशों पर निर्भर होता है, तो ऊर्जा केवल आर्थिक संसाधन नहीं रहती, बल्कि राजनीतिक और रणनीतिक हथियार भी बन जाती है। तेल और गैस की आपूर्ति में बदलाव पूरे विश्व की अर्थव्यवस्था को प्रभावित कर सकता है, और कर रहा है। कई बार ऊर्जा आपूर्ति पर नियंत्रण देशों के बीच तनाव, संघर्ष और युद्ध की स्थितियां भी पैदा कर देता है।

कार्बन आधारित ऊर्जा पर यह निर्भरता केवल राजनीतिक असुरक्षा ही नहीं पैदा करती, बल्कि पर्यावरण के लिए भी गंभीर खतरा बनती जा रही है। कोयला, तेल और गैस का उपयोग बड़ी मात्रा में कार्बन डाइऑक्साइड और अन्य प्रदूषकों को हमारी पृथ्वी के वातावरण में छोड़ता है। यही कार्बन उत्सर्जन फिर वैश्विक तापमान वृद्धि और जलवायु परिवर्तन का प्रमुख कारण बन रहा है। बढ़ती गर्मी, असामान्य वर्षा, सूखा और बाढ़ जैसी घटनाएं इसी का परिणाम हैं।

इस तरह कार्बन ऊर्जा हमें दोहरी समस्या में डालती है- एक ओर तो यह पर्यावरण को नुकसान पहुंचाती है, दूसरी ओर यह देशों के बीच निर्भरता और अस्थिरता को बढ़ाती है। दुनिया जितनी कार्बन ऊर्जा पर निर्भर होती चली जाती है, उतनी ही अधिक वह असुरक्षित और वल्नरेबल (कमजोर) बनती जाती है।

इसी संदर्भ में ऊर्जा स्वराज की अवधारणा महत्वपूर्ण है। ऊर्जा स्वराज का अर्थ है- ऊर्जा के मामले में स्वयं का राज, ऊर्जा में आत्मनिर्भरता। इसका मतलब यह नहीं कि हम पूरी तरह से बाहरी ऊर्जा स्रोतों से कट जाएं, बल्कि यह कि हम जितना संभव हो सके, अपनी ऊर्जा स्थानीय स्तर पर उत्पन्न करें और उसका विवेकपूर्ण उपयोग करें। कहते हैं ना- हम सुधरेंगे तो जग सुधरेगा।

जब कोई समाज और देश अपनी ऊर्जा का उत्पादन स्थानीय स्तर पर करने लगता है, जब वह ऊर्जा के दुरुपयोग को रोकता है, वह ऊर्जा की बहुमूल्यता को समझता है, तो उसकी बाहरी निर्भरता घटती है। इससे न केवल पर्यावरण को नुकसान कम होता है, बल्कि आर्थिक और राजनीतिक स्थिरता भी बढ़ती है।

मेरी ऊर्जा स्वराज यात्रा, जो 2020 में शुरू हुई, इसी विचार पर आधारित है। इस यात्रा का उद्देश्य लोगों तक यह संदेश पहुंचाना है कि हमें केवल नई ऊर्जा तकनीकों की ओर ही नहीं जाना है, बल्कि ऊर्जा के प्रति अपने व्यवहार और सोच को भी बदलना है।

आज जब दुनिया बार-बार ऊर्जा संकट और संघर्षों का सामना कर रही है, तब यह समझना आवश्यक है कि समाधान केवल अधिक ऊर्जा खोजने में नहीं, बल्कि सही ऊर्जा चुनने और उसका विवेकपूर्ण उपयोग करने में है। यदि हम ऊर्जा के मामले में आत्मनिर्भर और जिम्मेदार बनते हैं, तो हम न केवल जलवायु संकट को कम कर सकते हैं, बल्कि दुनिया को अधिक स्थिर और सुरक्षित भी बना सकते हैं। **(ये लेखक के अपने विचार हैं)**