'India plans up to quarter of 2027 LPG imports from US'

India faced worst LPG shortage earlier this year after the Iran war, closure of Strait of Hormuz disrupted supplies

HIGHLIGHTS

- Imports accounted for about 66 per cent of India's LPG consumption, according to government data
- State refiners IOC, BPCL & HPCL are expected to issue tenders within one to two months for US LPG supplies in 2027, the sources said

NEW DELHI: India plans to buy up to a quarter of its liquefied petroleum gas imports from the US in 2027, a move that would cut its reliance on the Middle East and support efforts to secure a trade deal with Washington, three sources with knowledge of the matter said.

New Delhi faced its worst LPG shortage earlier this year after the Iran war and closure of the Strait of Hormuz disrupted supplies. The government invoked emergency measures to divert petrochemical feedstocks from industry to households, which use LPG as cooking gas, *Reuters* reported.

The world's third-biggest oil importer and consumer bought about 90 per cent of its overall 21.85 million metric tons of LPG imports from the Middle East in 2025. Imports accounted for about 66 per cent of India's LPG consumption, according to government data.

State refiners Indian Oil Corp (IOC), Bharat Petroleum Corp (BPCL) and Hindustan Petroleum (HPCL) are expected to issue tenders within one to two months for US LPG supplies in 2027, the sources said, adding a delegation from the companies is also likely to travel to the US next month to discuss sourcing. Higher US energy purchases could help India narrow its trade surplus with Washington, a key demand from President Donald Trump, as New Delhi pushes to complete a long-awaited trade deal with Washington in the next three to four months.

India has pledged to increase US energy purchases by $10 billion to $25 billion in the near future, and the two nations have agreed to target $500 billion in bilateral trade by 2030.

New Delhi has already accelerated spot purchases from the US and other suppliers to offset reduced Middle East supplies. US LPG imports topped 1 million tons in June for the first time and are likely to exceed India's initial 2026 annual-contract target of 2.2 million tons, the sources said.

Lower supplies from the Middle East curtailed India's LPG consumption to about 14.7 million tons in January-June 2026, down about 8 per cent from a year earlier, while imports fell about 28 per cent to about 7.5 million tons, provisional government data showed.

This year India's LPG consumption is expected to decline to 30 million tons due to low supplies, one of the sources said.

But LPG imports could rise to about 20 million tons in 2027 as demand recovers to around 31 million tons, the source said.

"Diversification of LPG imports is being pursued to ensure supply security and mitigate risks arising from regional disruptions or geopolitical events," junior oil minister Suresh Gopi told lawmakers on Monday. AGENCIES

Hindu, Delhi, 29/07/2026
Page No: 13, Size: 5.98cm × 26.33cm

ONGC okays $500 mn PCG for MRPL for Saudi Aramco crude import

The Hindu Bureau
NEW DELHI

State-owned Oil and Natural Gas Corp (ONGC) said on Tuesday that it had approved a $500-million parent company guarantee (PCG) in favour of Saudi Aramco on behalf of subsidiary Mangalore Refinery and Petrochemicals Ltd. (MRPL) enabling them to import crude oil from Saudi Aramco.

"The board of directors, at its meeting held today has inter-alia approved the proposal to provide parent company guarantee (PCG) of $500 million in favour of Saudi Arabian Oil Company (Saudi Aramco) for the period 01.09.2026 to 31.08.2028 on behalf of (MRPL), to enable MRPL to import crude oil from Saudi Aramco," ONGC informed the bourses in an exchange filing.

The guarantee would be applicable for a period of approximately two years, i.e., between September 1, 2026 and August 31, 2028.

Economic Times, Delhi, 29/07/2026
Page No: 7, Size: 6.77cm × 25.45cm

India May Source 25% LPG Imports from US in 2027

New Delhi: India plans to buy up to a quarter of its liquefied petroleum gas (LPG) imports from the United States in 2027, a move that would cut its reliance on the West Asia and support efforts to secure a trade deal with Washington, three sources with knowledge of the matter said.

New Delhi faced its worst LPG shortage earlier this year after the Iran war and closure of the Strait of Hormuz disrupted supplies. The government invoked emergency measures to divert petrochemical feedstocks from industry to households, which use LPG as cooking gas.

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IRAN WAR

ENERGY SECURITY

The Hormuz reckoning

For India, the time to commit to expanded crude reserves and new LPG and LNG backup is now, not during the next closure of the strait

REUTERS

ON GUARD
A statue of Iranian military men overlooking the Strait of Hormuz, as vessels pass by near the beach of Bandar Abbas, Iran

The week, Delhi, 29/07/2026

Page No: 21, Size: 41.01cm × 58.74cm

BY SUNJAY SUDHIR

The memorandum of understanding signed by the United States and Iran on June 17 breathed hope into the energy world when it gave the two sides 60 days to work towards a final deal. Ships resumed crossing the Strait of Hormuz, although with strings attached. War risk premiums eased, and the Indian crude basket slipped back to its pre-conflict level of around $70 a barrel. Sadly, the renewed war winds blew that flicker out.

Barely a third of the way into the 60-day window, both nations declared the memorandum null and void. It capsized before the parties even came to the big sticking points of the nuclear programme, the proxies and war compensation. What sank it was something more elemental: deep disagreement over the rules of maritime passage through the Strait of Hormuz. With American airstrikes resuming and the naval blockade reinstated in mid-July, the region and the oil and gas world have plunged back into uncertainty. Brent, which had peaked above $126 a barrel earlier in the crisis, is climbing once more.

Whatever happens next, something has already been lost for good. The historical and legal consensus around the Strait of Hormuz, which survived the tanker war of the 1980s, decades of sanctions on Iran and even the 12-day Operation Rising Lion of June 2025, now stands shattered. The strait has been weaponised, whatever the tenets of international law may say. The MoU itself conceded as much. Its text stipulated that transit would proceed "with no charge for 60 days, only", an implicit acknowledgement that charges could follow. It also directed Iran to hold talks with Oman, in consultation with other Gulf littoral states, to define the future administration of maritime services in the strait. This gave Iran a handle on the waterway that it is unlikely ever to give up. Even in the best-case scenario, the world must now live with a Hormuz that can be priced, rationed or closed at will.

Why does this matter for India? Few countries are as exposed. The Gulf supplies 40 per cent of our crude imports, 60 per cent of our LNG, 92 per cent of our LPG and over 60 per cent of our urea imports. Add to this the thousands of Indian seafarers who found themselves trapped in Gulf waters, some of whom lost their lives in attacks on passing vessels. The global economy may have received its biggest shock since Covid, but India's burden has been disproportionate. To its credit, India handled the first phase of the crisis rather well. Whether the same playbook will work through a prolonged and more uncertain second phase is the question worth asking.

Crude sourcing has been the easier problem, since alternative suppliers exist. Procuring LNG and LPG has been far more complex. LPG fuels nearly 33 crore Indian kitchens, and LNG drives industry and fertiliser production. Through deft diplomacy and a whole-of-government effort, India extracted the highest number of laden vessels through the strait before the June 17 MoU: 12 LPG carriers, two LNG tankers and two crude carriers, several of them escorted out by the Indian Navy under Operation Sankalp. It is noteworthy that no queues appeared at petrol stations. Commercial users, from restaurants to ceramic units, took a hit, but household stoves stayed lit and fertiliser plants kept running. The Natural Gas and Petroleum Products Distribution Order, the amended LPG regulations and the direction to refineries to maximise LPG production all served their purpose. But such measures are short-term rationing tools, not answers to a prolonged shortage.

Even in the best-case scenario, the world must now live with a Hormuz that can be priced, rationed or closed at will.

Nor can we lean indefinitely on commercial inventories. India's strategic petroleum reserves cover barely 9.5 days of imports, and we hold no strategic stocks of LNG or LPG to speak of. The announcement during Prime Minister Narendra Modi's Abu Dhabi visit on May 15, scaling up Abu Dhabi National Oil Company's participation to store up to 30 million barrels of crude in our reserves, was welcome. But headline figures should not obscure the reality that strategic storage is capital-intensive and takes years to build. The time to commit to expanded crude reserves and new LPG and LNG reserves is now, not during the next closure of the strait.

The week, Delhi, 29/07/2026

Page No: 21, Size: 41.12cm × 58.05cm

IRAN WAR

ENERGY SECURITY

PTI

TALKING HEADS
Prime Minister Narendra Modi and UAE President Sheikh Mohamed bin Zayed Al Nahyan during delegation-level talks in Abu Dhabi in May

Diversification has been the other lifeline. Government and refiners moved quickly to spread crude sourcing across some 40 countries, including resumed supplies from Venezuela. The pivot on LPG was sharper still: the United States, Canada, Norway, Algeria and Argentina stepped in to replace the bulk of Gulf supplies, and the American share of our LPG imports jumped from 14 per cent in February to 55 per cent in May. Moreover, Russia consolidated its position as our top crude supplier, and the US emerged as a leading supplier of both LNG and LPG. This spread of sources, whatever its logistics costs, is precisely what will stand India in good stead while uncertainty hangs over Hormuz.

India can also capitalise on the fissures within OPEC, most dramatically the UAE's exit from the cartel in May. Freed from quotas, the Emirates shipped 3.94 million barrels a day in June, its highest in a year, while the weakened cartel has raised quotas for five consecutive months. Recognising that a closed Hormuz punishes exporters as much as importers, the Gulf producers have been proactive. The UAE has run its 380km Habshan to Fujairah pipeline flat out and is fast-tracking a second parallel line to double capacity by 2027. Saudi Arabia has pushed its 1,200km East-West pipeline to a record seven million barrels a day, though Yanbu's terminals can actually load far less. And a caution: Iran retains the capacity to strike Fujairah directly. It has already started squeezing the Bab el-Mandeb through the Houthis. Bypass routes reduce the risk, but they do not eliminate it.

Another reassuring factor for India has been the government cushioning the price shock. When Brent nearly doubled off its floor, most countries either raised pump prices by around a quarter or resorted to rationing. India's increase was marginal, achieved by cutting excise on petrol from ₹13 to ₹3 a litre and to nil on diesel, and by letting the three oil marketing companies absorb under-recoveries of ₹30,000 crore. This was the right call for inflation, but it is not sustainable. The exchequer bleeds, and under-recoveries punish the OMCs' shareholders, of whom the government is the largest.

Nevertheless, one policy deserves harder scrutiny. The government's strong defence of E20 ethanol blending has sparked intense public debate, and rightly so. The import savings are modest, while the costs are mounting: pressure on water, corrosion and reduced mileage in vehicles, and a visible shift of acreage away from oilseeds and pulses towards water-hungry sugarcane, maize and rice. We should not set food security against energy security when both are essential. A safer bet for displacing imported oil could be electric mobility.

Five priorities now demand attention. First, double the strategic petroleum reserve to 30 days of cover and fast-track a dedicated 30-day LPG reserve. Second, examine the feasibility of a subsea crude and LPG pipeline from Fujairah to India's west coast, a route that bypasses Hormuz altogether and lowers the choke-point risk. Third, bring the refinery and upstream expansions at Numaligarh, Barmer and the west coast on line ahead of schedule. Fourth, write a diversification charter into policy so that no single country supplies more than 15 per cent of our crude or LPG. Fifth, accelerate the energy transition itself: solar manufacturing under the PLI scheme, the Green Hydrogen Mission's electrolysers, grid-scale storage and electrified public transport. Every kilowatt hour generated within our borders is one that never has to pass through the Strait of Hormuz.

The strait could reopen next month or next year. Our vulnerability should not wait on either.

Sudhir is former ambassador to the UAE and distinguished fellow, JSW School of Public Policy, IIM Ahmedabad.

Financial Express, Delhi, 29/07/2026
Page No: 13, Size: 14.55cm × 12.59cm

PSUs seek 3-mth extension for concessional forex swap

FE BUREAU
New Delhi, July 28

LEADING PUBLIC SECTOR undertakings (PSUs) have requested the Reserve Bank of India (RBI) to extend its special concessional foreign exchange swap facility by three months past its current December 31 deadline to support capital expenditure.

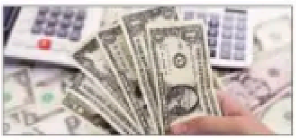
In a recent high-level meeting with central bank officials, representatives from leading PSUs urged the regulator to keep the concessional window for External Commercial Borrowings (ECBs) operational through the final quarter of the financial year.

Industry sources familiar with the discussions highlighted that the bulk of annual capital expenditure and debt raising by public sector firms takes place in the fourth quarter. An extension through March 2027 would ensure uninterrupted access to lower-cost foreign currency hedging, facilitating higher mobilisation of funds for large-scale projects.

The central bank had originally introduced the special US dollar-rupee forex swap window in June to shore up the country's foreign exchange reserves, stabilise the rupee, and ease balance-of-payments (BoP) pressures.

The swap window is available to banks too for mobilising deposits through Non-Resident Indians (NRIs) and Overseas Citizens of India (OCIs). Banks can raise Fresh Foreign Currency Non-Resident (Bank) or FCNR(B) deposits with a tenure of 3-5 years from June 8, 2026, to September 30, 2026.

RUPEE SUPPORT



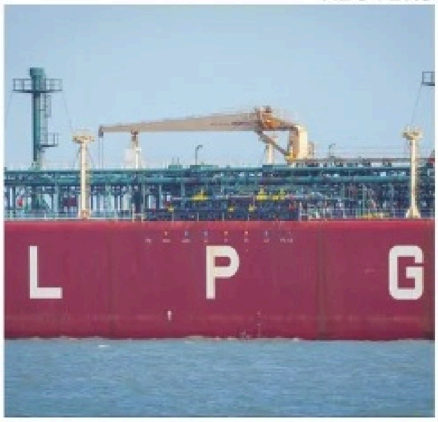
- RBI had originally introduced a special US dollar-rupee forex swap window in June
- Banks can raise Fresh Foreign Currency Non-Resident (Bank) deposits with tenures of 3-5 years

Mint, Delhi, 29/07/2026
Page No: 2, Size: 15.56cm × 11.54cm

Up to quarter of India's 2027 LPG buys to come from US

New Delhi: India plans to buy up to a quarter of its liquefied petroleum gas (LPG) imports from the US in 2027, a move that would cut its reliance on West Asia and support efforts to secure a trade deal with Washington, three persons with knowledge of the matter said. Three state refiners are expected to issue tenders within one to two months for supplies. **REUTERS**

REUTERS



Mint, Delhi, 29/07/2026
Page No: 6, Size: 57.76cm × 63.50cm

Petrol retailers nudge govt to bear cost of E20 quality check

Retailers have asked the petroleum ministry to notify a SOP, reimburse dealers

Dhirendra Kumar &
Rituraj Baruah

NEW DELHI

Fuel stations are moving oil marketing companies (OMCs) to bear the cost of quality checks for ethanol-blended fuel, highlighting ongoing challenges in rolling out a fuel the government claims burns cleaner, saves forex, and helps farmers.

Retailers said that OMCs have prescribed regular E20 quality tests using a water-mixing method that renders the sample unfit for use. They have now reached out to OMCs and asked the petroleum ministry to notify a standard operating procedure, approve non-destructive testing equipment and reimburse dealers until then.

Prabhat Kumar Singh, president of the Bihar Petroleum Dealers Association (BPDA), said OMCs should provide dealers with scientifically validated testing equipment to verify the ethanol content of E20 petrol supplied through depots and stored at retail outlets.

"The entire fuel dispensing infrastructure—from storage tanks and pipelines to dispensing units—is owned and maintained by the OMCs. Dealers simply retail the fuel supplied to them. If quality verification is mandatory, OMCs should provide approved testing equipment instead of asking dealers to rely on unscientific methods," Singh said. The water-mixing method is not a scientifically validated field test and results in losses, Singh added.

For a petrol pump operating round clock, about 9 litres of petrol may get wasted in a day under the new testing protocol, dealers said.

Out of India's 100,000 retail fuel stations, 90,600 are served by state-run OMCs. Queries mailed to the petroleum ministry, Indian Oil Corp. Ltd, Bharat Petroleum Corp. Ltd and Hindustan Petroleum Corp. Ltd remained unanswered.

The government claims that ethanol-blended fuel burns cleaner and saves forex. PTI

Under the OMC-prescribed test, when water is added to an E20 sample, ethanol binds with water and forms a separate layer. This process, known as phase separation, alters the chemical composition of the remaining petrol, rendering it unfit for use. In contrast, regular petrol undergoes a density test, which does not spoil the sample.

"Dealers have been asked to test the ethanol content by mixing 30ml of water with a 100ml sample of ethanol-blended petrol. If the ethanol content is 20%, the ethanol combines with the water and the lower layer increases to about 50ml. After deducting the original 30ml of water, the remaining 20ml indicates 20% ethanol content," Singh of BPDA explained.

"However, this process causes phase separation, permanently altering the composition of the fuel. The tested sample cannot be sold and has to be discarded. Until a proper standard operating procedure and scientifically approved portable testing equipment are made available, dealers should be compensated for the fuel lost during mandatory testing," he added.

Monty Sehgal, spokesperson for the Petrol Dealers Association, Punjab, said that the high frequency of testing can lead to significant financial losses. "Further, the additional testing requirement has also been directed only towards the pumps of government-owned companies and the pumps of private companies have been left, which should not have been the case," Sehgal said.

India's aggressive push for E20 has sparked a public backlash. At the core of grievances are complaints of mileage drop and claims of component corrosion and engine damage. Union transport minister Nitin Gadkari on Monday moved the Bombay High Court for permission to sue tech giants over defamatory content falsely accusing him and his family of profiting from the policy. Meanwhile, commercial drivers and operators represented by the Delhi Taxi and Tourist Transporters Association have announced a Parliament march on 4 August, demanding an independent scientific review of the E20 rollout.

On 8 July, the petroleum ministry wrote to all state chief secretaries that adulteration and illegal fuel sale undermine the integrity of the petroleum distribution system, adversely affect vehicle performance, contribute to environmental pollution, compromise consumer safety and result in significant loss of revenue to the states and union territories.

dhirendra.kumar@livemint.com

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

PETROL PAINS

RETAILERS said that OMCs prescribed regular E20 quality tests using a water-mixing method

THE retailers said that the method renders the sample unfit for use

BPDA chief said OMCs should give dealers scientifically validated testing equipment

OUT of India's 100,000 retail fuel stations, 90,600 are served by state-run OMCs

Business Standard, Delhi, 29/07/2026
Page No: 4, Size: 18.65cm × 17.41cm

ONGC okays $500 mn guarantee for MRPL to import oil from Aramco

State-owned Oil and Natural Gas Corporation (ONGC) on tuesday said its board has approved a parent company guarantee of $500 million in favour of Saudi Aramco on behalf of its subsidiary Mangalore Refinery and Petrochemicals Ltd (MRPL) to facilitate crude oil imports. The guarantee will remain valid from September 1 to August 31, 2028. BS REPORTER

Millennium Post, Delhi, 29/07/2026
Page No: 10, Size: 22.73cm × 24.37cm

Infra projects register cost overrun of around ₹4,92,752 crore, says MoSPI

OUR CORRESPONDENT

NEW DELHI: Infrastructure projects worth above Rs 150 crore each registered a cumulative cost overrun of around Rs 4,92,752 crore, according to a monthly government report for June 2026.

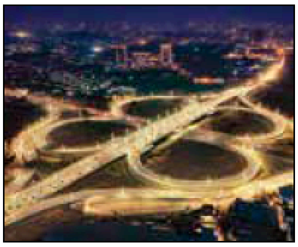
A total of 1,847 ongoing infrastructure projects across 17 Central Ministries/ Departments were monitored and it was found that the total revised cost was Rs 40,54,473 crore compared to their original cost of Rs 35,61,721 crore.

The report, however, did not specify the actual number of projects that faced cost overrun.

The cumulative expenditure incurred on these projects stands at Rs 21.97 lakh crore, accounting for approximately 54.18 per cent of the revised project cost, indicating steady progress in project implementation, a statement by the Ministry of Statistics and Programme Implementation (MoSPI) said.

A significant proportion of projects are at advanced stages, with 709 projects (39 per cent) achieving over 80 per cent physical progress, while 337 (19 per cent) have crossed 80 per cent financial completion. The data also showed a balanced pipeline, with projects distributed across early and advanced stages of implementation.

The Transport & Logistics sector accounts for the highest



number of ongoing projects (1341 projects), with revised estimates of Rs 22.32 lakh crore underscoring priority to connectivity-driven infrastructure growth.

The 1,847 ongoing infrastructure projects include 769 Mega projects (project cost of Rs 1,000 crore & above) with an original cost of Rs 30.51 lakh crore, and 1,078 Major projects (project cost below Rs 1,000 crore and up to Rs 150 crore) amounting to Rs 5.10 lakh crore.

Physical and financial progress broadly move in tandem, with a large number of projects clustered at the initial (0–20 per cent) and advanced (81–100 per cent) stages, indicating a pipeline of newly-started projects alongside many nearing completion.

While physical progress exceeds financial progress in the 81–100 per cent range, financial progress is relatively higher in the early stages, reflecting upfront expenditure patterns in project implementation.

Ministry of Road Transport & Highways accounts for the highest number of projects, with 1022 projects (55 per cent), and a share of total revised project cost of Rs 9.89 lakh crore (24 per cent), highlighting its central role in national infrastructure development. Ministry of Railways is implementing 255 projects (14 per cent), with a total revised project cost of Rs 8.69 lakh crore (21 per cent).

Ministry of Coal accounts for implementing 121 projects (7 per cent), with a total revised project cost of Rs 2.22 lakh crore (6 per cent).

The Ministry of Petroleum & Natural Gas, Ministry of Power, Ministry of Housing & Urban Affairs & Department of Water Resources, River Development & GR are implementing 105, 98, 50, and 40 projects, respectively, with associated revised costs of Rs 4.33 lakh crore, Rs 5.71 lakh crore, Rs 3.65 lakh crore, and Rs 2.04 lakh crore, respectively.

The remaining 156 projects (8 per cent), with a total revised cost of Rs 4.02 lakh crore (10 per cent), are distributed across various Ministries/ Departments including Higher Education, Civil Aviation, Steel, Telecommunications, Labour & Employment, Ports, Shipping & Waterways, Health & Family Welfare, Mines, DPIIT, and Sports.

Transport & Logistics remains the dominant sector, accounting for 55 per cent of total revised project cost (Rs 22.32 lakh crore) across 1,341 projects (73 per cent of the total Projects), underscoring the central role of Roads & Highways, Railways, Aviation, Urban Public Transport, Shipping, and Inland Waterways in economic integration and logistics efficiency.

The Energy sector follows with 26 per cent of aggregated revised cost (Rs 10.38 lakh crore) across 207 projects, reflecting sustained emphasis on Oil & Gas infrastructure, electricity generation, transmission and distribution networks, and energy storage systems.

Communication infrastructure, with a project cost of Rs 2.64 lakh crore (7 per cent) across 15 projects, represents targeted interventions aimed at strengthening digital connectivity. Water & Sanitation projects account for Rs 2.08 lakh crore (5 per cent) across 56 projects, highlighting continued focus on essential urban services.

Social & Commercial infrastructure, comprising 88 projects with a revised project cost of Rs 0.94 lakh crore (2 per cent), reflects selective investments in education, healthcare, real estate, and tourism, hospitality and wellness. Projects classified under 'Others', amounting to Rs 2.18 lakh crore (5 per cent) across 140 projects, indicate diversification across sectors such as coal, steel, metals & mining.

Amar Ujala, Delhi, 29/07/2026
Page No: 12, Size: 18.71cm × 19.18cm

होर्मुज संकट और व्यापार समझौते के बीच ऊर्जा सुरक्षा की नई चाल

अमेरिका से बढ़ेगी गैस की आपूर्ति आयात में होगा एक चौथाई हिस्सा

बोनस डेस्क

नई दिल्ली। भारत अपनी रसोई गैस यानी एलपीजी आपूर्ति का नक्शा बदलने की तैयारी कर रहा है। सरकारी तेल कंपनियां 2027 से देश के कुल एलपीजी आयात का करीब एक-चौथाई हिस्सा अमेरिका से मंगाने की योजना पर आगे बढ़ रही हैं। भारत की एलपीजी जरूरत का बड़ा हिस्सा अभी पश्चिम एशिया से आता है, लेकिन होर्मुज जलडमरूमध्य पर बढ़ते जोखिम, आपूर्ति में रुकावट और अमेरिका के साथ व्यापार समझौते की बातचीत ने ऊर्जा नीति को नई दिशा दे दी है। यह कदम पश्चिम एशिया पर निर्भरता घटाने और वॉशिंगटन के साथ व्यापार संतुलन सुधारने की रणनीति का हिस्सा हो सकता है।

सरकार की इस योजना में इंडियन ऑयल, भारत पेट्रोलियम और हिंदुस्तान पेट्रोलियम जैसी सरकारी तेल विपणन कंपनियां अहम भूमिका निभाएंगी। ये कंपनियां पहले ही 2026 के लिए अमेरिकी खाड़ी तट से 22 लाख टन एलपीजी खरीदने का अनुबंध कर चुकी हैं। जून में अमेरिका से भारत का एलपीजी आयात पहली बार 10 लाख टन के पार जाने का अनुमान है।

इसका मतलब है कि अमेरिका अब भारत के रसोई गैस बाजार में आकस्मिक आपूर्तिकर्ता नहीं, बल्कि रणनीतिक स्रोत बनता जा रहा है। भारत के लिए यह बदलाव मजबूरी और रणनीति, दोनों का मेल है। पश्चिम एशिया से कम आपूर्ति के कारण जनवरी-जून 2026 में एलपीजी खपत घटकर करीब 1.47 करोड़ टन रह गई। इस अवधि में आयात करीब 28 फीसदी घटकर 75 लाख टन रह गया। आंकड़े बता रहे हैं कि आपूर्ति का झटका सिर्फ बाजार की खबर नहीं, सब्सिडी नीति से भी जुड़ा है।

कच्चा तेल उत्पादन बढ़ाने के लिए 80,000 करोड़ रुपये की योजना

विदेशी गैस पर निर्भरता घटाने के साथ सरकार घरेलू तेल और गैस खोज को भी बढ़ाना चाहती है। पेट्रोलियम मंत्रालय गहरे समुद्र में तेल-गैस खोज के लिए करीब 80,000 करोड़ रुपये के प्रोत्साहन पैकेज पर काम कर रहा है। कुओं की खुदाई लागत का 50 फीसदी तक हिस्सा सरकार वहन कर सकती है। इसका मकसद विदेशी और निजी कंपनियों को समुद्री क्षेत्रों में निवेश के लिए आकर्षित करना है।

होर्मुज के विकल्प की तलाश

होर्मुज भारत की ऊर्जा सुरक्षा की सबसे कमजोर नस है। पश्चिम एशिया से आने वाला तेल और गैस का हिस्सा इसी रास्ते से गुजरता है। हालिया तनाव के बाद भारत ने रूस और लैटिन अमेरिका से कच्चे तेल की खरीद बढ़ाई। एलपीजी में भी अमेरिका को बड़ा स्रोत बनाना इसी का विस्तार है। हालांकि, अमेरिकी एलपीजी सस्ती पड़े, यह जरूरी नहीं।

ट्रेड डील पर नजर : अमेरिका लंबे समय से भारत से ऊर्जा खरीद बढ़ाने का दबाव डाल रहा है। भारत के लिए दो फायदे हैं। पहला, पश्चिम एशिया से आपूर्ति जोखिम घटता है। दूसरा, अमेरिका के साथ व्यापार घाटे और रणनीतिक रिश्तों में ऊर्जा खरीद संतुलनकारी औजार बन सकती है।