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EDITORIAL ANALYSIS

# Trump's Energy Dominance vs. China's Petro-Network — And India's Exposed Position

INDIAN EXPRESS

9 April 2026 · GS2 · GS3

CURATED &amp; WRITTEN BY

**Bharat Choudhary**

UPSC Educator &amp; Content Creator

[linkedin.com/in/epicbharat](https://www.linkedin.com/in/epicbharat)

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# Trump's Energy Dominance vs. China's Petro-Network — And India's Exposed Position

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## CONTEXT

The **Indian Express editorial** examines the **US-China energy competition** — specifically the US strategy (under the Trump administration) of “forced re-hemisphering” of global energy flows to isolate China’s petro-state partners and redirect LNG and oil flows toward US-aligned markets. The editorial assesses China’s resilient counter-strategy and India’s exposed position as a swing buyer.

## THE EDITORIAL ARGUMENT

### 1. The US “Energy Dominance” Strategy

The Trump administration’s “energy dominance” doctrine aims to:

- Maximise US oil and gas production (LNG, shale) and redirect exports to Asia-Pacific markets
- **“Re-hemisphere” global energy flows** — redirect supply chains away from Russia, Iran, and Venezuela (China’s primary petro-state partners)
- Use energy as a geopolitical lever — countries that buy US LNG gain preferential trade terms; those that buy from adversaries face tariff pressures

### 2. China’s Counter-Strategy

The editorial argues China has built structural resilience against US energy pressure:

- **Pipeline diversification** — Power of Siberia 1 and 2 (Russia), Central Asia gas pipelines, Myanmar pipeline
- **Yuan-denominated energy trade** — exceeding 50% of China’s commodity commerce
- **Long-term supply agreements** — locking in Russian, Gulf, and Central Asian supply at fixed terms
- **Refining capacity** — China’s massive domestic refining capacity absorbs diverse crude grades



This resilience means US “re-hemispherizing” has limited success against China’s energy architecture.

### 3. India’s Position: Opportunity and Risk

#### Opportunity:

- India can exploit the **arbitrage** — buying discounted Russian crude (not sanctioned specifically for India) while also importing US LNG for diversification
- India’s growing refining capacity makes it a potential re-export hub for processed petroleum products
- US-India energy partnership (LNG supply agreements) can deepen as Washington seeks alternatives to China

#### Risk:

- India is caught between US pressure to reduce Russian crude purchases and its own energy cost calculations
- If the US-China energy contest intensifies, India’s non-alignment may attract **punitive** treatment from Washington
- India’s **refinery infrastructure** is calibrated for specific crude grades — rapid source switching has costs

### 4. The IMEC Dimension

The editorial connects the energy contest to **IMEC (India-Middle East-Europe Economic Corridor)** — announced at G20 New Delhi 2023. IMEC was partly designed as an alternative connectivity route reducing dependence on China-linked sea lanes. The US-Iran conflict damaged Gulf infrastructure temporarily, but the ceasefire creates a window for IMEC acceleration.

## UPSC RELEVANCE

### GS Paper 2 — International Relations

- US-China geopolitical competition — energy as a strategic instrument
- India’s **multi-alignment** — navigating US-China energy bifurcation
- India-Russia energy ties — Russian crude discounts vs. US pressure

### GS Paper 3 — Economy / Energy

- Energy diversification — India’s crude import sources, LNG, SPR
- Petroyuan — yuan-denominated energy trade and its implications for dollar hegemony
- IMEC — India-Middle East-Europe corridor context



## Mains Angle

“The emerging US-China energy contest places India in a structurally ambiguous position — as a swing buyer with opportunities for arbitrage but risks of being pressured by both sides. Examine.” (GS2 + GS3)

### FACTS CORNER

ITEM	FACT
US strategy	“Energy dominance” + “forced re-hemisphering” of global energy
China yuan-energy trade	>50% of China’s commodity commerce yuan-denominated
China pipelines	Power of Siberia 1 (Russia), Central Asia pipelines, Myanmar pipeline
India crude from Russia (FY26)	~40% of India’s crude imports (discount-driven)
India crude from Gulf	~60% (historically) — shifted post-Ukraine war
IMEC	India-Middle East-Europe Economic Corridor (G20 New Delhi, 2023)
US LNG exports	Growing; major markets: Europe, Japan, South Korea, India
India refining capacity	~250 million metric tonnes/year (world’s 4th largest)

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## Bharat Choudhary

UPSC Educator &amp; Content Creator

[linkedin.com/in/epicbharat](https://www.linkedin.com/in/epicbharat)[Read Full Article on Ujiyari →](#)<https://ujiyari.com/editorials/2026/04/trump-china-energy-dominance-india-pivot/>

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