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EDITORIAL ANALYSIS

West Asia Conflict's Hidden Impact: LPG Supply, Food Inflation, and India's Nutrition Security

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IR**ECONOMY****SOCIAL ISSUES****GS2****GS3**

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GS2

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INTERVIEW ANGLE

"India's Ujjwala Yojana gave 10 crore households clean cooking fuel — but the scheme's success has made India more vulnerable to a Gulf supply shock. Is this a policy design flaw or an inevitable consequence of import dependence?"

WHY IN NEWS

The ongoing West Asia conflict has disrupted LPG supply chains through the **Strait of Hormuz** — a chokepoint through which over 90% of India's LPG imports transit. The *Indian Express* editorial examines cascading effects on India's food inflation, institutional nutrition programmes, and the structural vulnerability exposed by India's deep Gulf energy dependence.

INDIA'S LPG IMPORT DEPENDENCE — THE NUMBERS

India's dependence on Gulf LPG is structural and cannot be rapidly unwound:

METRIC	FIGURE
Annual LPG consumption	~31.3 million tonnes (MT)
Domestic production	~40% (~12.8 MMT in FY2024-25)
Import share	~60%
Gulf/West Asia share of imports	Over 90%
Gulf share of total consumption	~54–56%
LPG imports via Strait of Hormuz	Nearly all Gulf imports transit through it

Top Gulf LPG suppliers: UAE, Qatar, Kuwait, Saudi Arabia — all connected to Indian ports through Hormuz-transiting tankers.

India has tried to diversify towards US LPG (from the Gulf Coast), but logistical constraints — longer shipping times (+15–18 days) and terminal infrastructure limitations — mean Gulf substitution remains partial.

THE TRANSMISSION: FROM HORMUZ TO THE KITCHEN

The editorial identifies three distinct channels through which an LPG supply shock reaches India's food and nutrition security:

Channel 1 — Commercial Sector Cost-Push

LPG is the primary cooking fuel for:

- Restaurants, dhabas, and street food vendors (employing ~7 crore workers)
- Mid-day meal kitchens (serving ~12 crore school children under PM POSHAN)
- Anganwadi cooking centres (under ICDS/Poshan Abhiyaan — ~14 lakh centres)
- Industrial canteens and catering operations

When commercial LPG cylinder supply is rationed or prices rise, food service operating costs increase directly — passing through to consumer food prices in the CPI services component.

Channel 2 — Government Priority Rationing Creates Institutional Gaps

Under the Essential Commodities Act (invoked March 2026 during the supply crisis), the government prioritised **domestic cylinder allocation** and capped commercial LPG allocation. This creates supply gaps for:

- School kitchens that rely on commercial cylinder supply
- Anganwadi centres that sometimes procure commercially due to administrative delays in subsidised supply
- Private hospitals and elderly care homes

Channel 3 — Ujjwala Households at the Last Mile

India's flagship **Pradhan Mantri Ujjwala Yojana (PMUY)** has connected over **10 crore below-poverty households** to LPG — the world's largest clean cooking programme. However:

- PMUY beneficiaries are most price-sensitive; refill rates drop sharply during price spikes
- A 2024–25 survey showed ~22% of PMUY beneficiaries had reverted to biomass cooking during periods of cylinder scarcity
- Reverting to biomass cooking has direct **respiratory health, nutrition, and gender equity** implications — women bear the burden of biomass collection and smoke-related illness

WHY THIS IS A FOOD SECURITY ISSUE, NOT JUST AN ENERGY ISSUE

The link between LPG and nutrition security is more direct than commonly appreciated:

- **Mid-day meals:** PM POSHAN serves ~12 crore children in ~11.8 lakh schools. Kitchen disruptions mean meal quality or continuity suffers — with direct stunting and nutrition implications in early childhood
- **Anganwadi centres:** Serve ~7 crore children under 6 and ~1.8 crore pregnant/lactating women — the most nutritionally vulnerable population
- **CPI food inflation:** LPG cost-push through restaurants and food services feeds into the food-and-beverages sub-index of CPI — RBI inflation projections for 2026 already factor in 4.2–4.5% food-related CPI pressure from the energy-food linkage

THE STRUCTURAL VULNERABILITY

The editorial makes a broader point: **India’s clean cooking success has paradoxically deepened its import vulnerability.** The shift from biomass to LPG under Ujjwala — a genuine public health success — transferred 10 crore households’ cooking energy source from locally available (if polluting) biomass to an internationally priced import commodity.

This is not an argument against Ujjwala — it is an argument for building resilience:

POLICY RESPONSE	DESCRIPTION
Strategic LPG Reserve	Build 30-day strategic LPG stockpile on the model of India’s Strategic Petroleum Reserve (SPR)
PNG expansion	Piped Natural Gas penetration into cities and semi-urban areas reduces LPG dependence
Biogas under GOBARdhan	Compressed biogas from agricultural waste; supplements LPG in rural areas
Electric cooking push	Induction cooktops linked to renewable electricity; PM Surya Ghar Muft Bijli Yojana beneficiaries
Import diversification	US LPG contracts; Australia LNG spot markets

INDIA’S SPR INADEQUACY — A PARALLEL LESSON

India’s Strategic Petroleum Reserve (SPR) holds crude oil reserves equivalent to roughly **9.5 days of consumption** — far below the IEA standard of 90 days. There is no equivalent LPG strategic reserve. The 2026 crisis has exposed this gap sharply.

UPSC RELEVANCE

PAPER	ANGLE
GS2 — IR	West Asia conflict; Strait of Hormuz; India's energy security
GS3 — Economy	Energy import dependence; LPG supply chain; food inflation mechanism
GS2 — Governance	Ujjwala Yojana; PM POSHAN; ICDS; Essential Commodities Act
GS1 — Society	Clean cooking and gender equity; biomass health burden
Mains Keywords	Strait of Hormuz, PMUY, PM POSHAN, strategic petroleum reserve, LPG import dependence, food-energy nexus, GOBARdhan

*Consumption: ~31.3 MT/year | Domestic production: ~40% | Imports: ~60% | Gulf share of imports: >90% | Gulf share of total consumption: ~54–56% | All Gulf LPG transits **Strait of Hormuz** | PMUY: 10 crore+ households connected to LPG (world's largest clean cooking programme) | PM POSHAN: 12 crore school children; 11.8 lakh schools | ICDS/Anganwadi: 14 lakh centres; 7 crore children + 1.8 crore pregnant/lactating women | India's SPR: ~9.5 days crude oil (no LPG strategic reserve) | IEA standard: 90 days | GS2/GS3: International Relations, Economy*

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