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EDITORIAL ANALYSIS

West Asia War – Disruptions in Global Fuel Supply and India's Energy Choices

 **INDIAN EXPRESS**

22 April 2026

ECONOMY**IR****ENVIRONMENT****GS3****GS2**

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GS3

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The Indian Express

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INTERVIEW ANGLE



"If the Strait of Hormuz is disrupted, can India switch to coal and nuclear to compensate? What does the West Asia conflict reveal about the urgency — and limits — of India's energy transition?"

THE CORE ARGUMENT

The West Asia conflict of 2025-26, with its threat to Strait of Hormuz transit and actual disruptions to LPG supply chains, has reinvigorated debate about the **resilience of India's energy mix**. The editorial examines whether India can — in the medium term — compensate for West Asian oil and gas supply disruptions by accelerating coal-based generation and advancing its nuclear power programme, while continuing the renewables transition. It concludes that a **temporary coal bridge + accelerated nuclear + sustained renewables** is the realistic energy security formula, but cautions that it must not become a permanent excuse to delay the clean energy transition.

INDIA'S CURRENT ENERGY MIX — 2025-26

Electricity Generation

SOURCE	SHARE OF GENERATION
Coal	~72%
Renewables (solar+wind+hydro)	~22%
Nuclear	~3%
Gas	~3%
Oil	<1%

Primary Energy

SOURCE	SHARE OF PRIMARY ENERGY
Coal	~54%
Oil	~28%
Natural gas	~6%
Renewables	~8%
Nuclear	~1%
Biomass/traditional	~3%

India is the world's 3rd largest oil importer (after China and the USA) — importing ~5 million barrels/day in 2025-26.

THE HORMUZ VULNERABILITY

Strait of Hormuz — The Critical Chokepoint

FEATURE	DETAIL
Width	~39 km at narrowest; navigable lanes of 3 km each direction
Transit	~20 million barrels/day (about 20% of global oil trade)
Dependents	India, China, Japan, South Korea, Pakistan
India dependency	~80-85% of oil imports transit Hormuz
Alternatives	None fully viable; Cape of Good Hope adds 2-3 weeks

In 2025-26, Iran's threats to close the Strait — following U.S. naval operations and vessel seizures — caused:

- **Brent crude:** Spike to \$110-120/barrel (from ~\$80 baseline)
- **LPG prices:** 40-50% increase in global spot markets
- **Insurance premiums:** War risk premiums on tankers up 5-10x
- **India's import bill:** Estimated additional ₹80,000-1,00,000 crore annualised impact

OPTION 1 — COAL AS A BRIDGE FUEL

India's Coal Situation

India is the **world's 2nd largest coal consumer** (after China) and the 2nd largest importer of coal.

However, India also has vast domestic reserves:

INDICATOR	FIGURE
Proved coal reserves	361 billion tonnes (7th globally)
Annual coal production	~1,000 MT (FY2025-26)
Annual coal consumption	~1,100+ MT
Import dependence (coking coal)	~85%
Import dependence (thermal coal)	~25-30%

Key advantage: Thermal coal for electricity generation is partly domestically sourced — unlike oil, which is nearly 90% imported. A Hormuz disruption does not directly threaten India’s coal supply (most coking coal imports come from Australia/Indonesia — different maritime routes).

The Coal Expansion Option

Under energy emergency scenarios, India can:

- ❶ **Increase coal plant PLF (Plant Load Factor):** Average thermal PLF is ~63-65%; can be pushed to 75-80%
- ❷ **Accelerate pit-head generation:** Build new capacities near coal mines in Jharkhand, Chhattisgarh, Odisha
- ❸ **Delay retirement of aging units:** Some plants slated for decommissioning can be retained as emergency reserves

Problem: Higher coal use → higher CO₂ emissions → contradicts India’s NDC commitments (45% emissions intensity reduction by 2030). India must navigate this as a **temporary emergency measure** with sunset clauses.

OPTION 2 — NUCLEAR POWER

India’s Nuclear Programme

INDICATOR	CURRENT
Installed nuclear capacity	~7.5 GW (as of 2026)
Plants operational	NPCIL plants: Tarapur (Maharashtra), Rawatbhata (Rajasthan), Kudankulam (Tamil Nadu), Kaiga (Karnataka), Narora (UP), Kakrapar (Gujarat)
Under construction	Kudankulam Units 3&4; PFBR Kalpakkam (580 MW)
2031-32 target	22.5 GW (government target — aggressive)
NDC target	100 GW nuclear by 2047

The Nuclear Scale-Up Case

- ❶ Nuclear power is **dispatchable** (unlike solar/wind) — runs 24/7, weather-independent
- ❷ **Zero fuel import dependency** for uranium from diversified sources (Kazakhstan, Canada, Australia)
- ❸ Lifetime carbon footprint comparable to wind power

- ④ **PFBR (Prototype Fast Breeder Reactor) at Kalpakkam** — if operational, starts India's thorium cycle — India has world's 3rd largest thorium reserves

Nuclear Challenges

CHALLENGE	DETAIL
Long lead time	10-15 years from sanction to commissioning
Cost	₹8-12 crore/MW (vs. ₹4-6 crore/MW for solar)
Nuclear liability	Civil Liability for Nuclear Damage Act (CLNDA) 2010 — deters foreign vendors
Uranium import	India importing uranium under India-specific safeguards (2008 NSG waiver)
Public acceptance	Kudankulam protests showed community opposition challenge

OPTION 3 — RENEWABLES (THE LONG-TERM SOLUTION)

RENEWABLE	2025-26 CAPACITY	2030 TARGET	STATUS
Solar	~220 GW	280 GW	On track
Wind	~55 GW	140 GW	Behind schedule
Hydro (large)	~47 GW	70 GW	Limited potential
Green hydrogen	~0.5 GW equivalent	5 MMT production	Early stage

Limitation: Solar and wind are **intermittent** — cannot replace dispatchable fossil fuel capacity 1:1 without massive battery storage. Battery storage technology is cost-declining but not yet at scale for grid backup.

INDIA'S STRATEGIC ENERGY CHOICES

Optimal Mix for Energy Security

SCENARIO	COAL	NUCLEAR	RENEWABLES	LNG/LPG IMPORTS
Current (2026)	72%	3%	22%	3%
2030 target	55%	5%	35%	5%
Emergency (Hormuz closure)	+5-8% temporarily	Same	Same	Reduce
Long-term 2047	30%	25%	45%+	<5%

Strategic Petroleum Reserve (SPR) — India's Buffer

India's SPR stores crude oil at three locations:

LOCATION	STATE	CAPACITY
Visakhapatnam	Andhra Pradesh	1.33 MMT
Mangaluru	Karnataka	1.5 MMT
Padur	Karnataka	2.5 MMT
Total		~5.33 MMT (~12 days import)

Target: Expand to 15-16 MMT (30+ days). India is building Phase II (Chandikhol, Rajkot).

UPSC ANGLE

PAPER	ANGLE
GS3 — Economy	Energy security, Hormuz, Strategic Petroleum Reserve, coal vs nuclear vs renewables
GS3 — Environment	Energy transition, NDCs, coal emissions, green hydrogen
GS2 — IR	West Asia conflict, India-Iran, India-Saudi Arabia, energy diplomacy

Mains Keywords: Hormuz chokepoint, SPR, coal PLF, PFBR Kalpakkam, CLNDA 2010, NSG waiver, India NDC, green hydrogen, energy transition, energy security, nuclear liability

Probable Question: “India’s energy security dilemma between fossil fuels and clean energy is sharpened by geopolitical instability in West Asia. Critically examine India’s options.” (GS3 Mains)

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