



Security Nexus Perspective

NAVIGATING THE STORM: INDIA'S ENERGY SECURITY AND THE STRATEGIC PIVOT TO THE UNITED STATES

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Amidst the escalating international armed conflict involving Iran, Israel, and the United States, the Indian government has proactively implemented a series of measures to safeguard the nation's energy security. New Delhi has [invoked](#) the Essential Commodities Act of 1955, a crucial legislation designed to control the supply and ensure the equitable distribution of commodities of national interest at fair prices. Furthermore, in an effort to preserve its energy reserves for domestic stability, India has [resisted](#) calls from the International Energy Agency (IEA) to release its strategic oil reserves. To shield its citizens from the volatile global energy market, the government has [reduced](#) the excise duty on petrol and diesel.

Concurrently, efforts are underway to make alternative fuels more widely [available](#) to secure supply lines. In a recent address to the Parliament, Prime Minister Narendra Modi [reassured](#) the nation of India's preparedness to manage the unfolding crisis. Nevertheless, the relentless surge in global crude oil prices driven by the ongoing West Asia conflict recently compelled state-run oil marketing companies to implement a [₹3 per liter hike](#) in petrol and diesel prices across India, marking the first such increase in over four years.

To mitigate the economic impact and reduce reliance on imports, Prime Minister Modi has championed nationwide [fuel conservation initiatives](#), urging citizens and officials alike to adopt sustainable practices and reduce fuel consumption. State governments are rapidly mobilizing in response to this call; for instance, [Delhi has introduced a two-day work-from-home policy](#) for government employees, while leaders in states like Bihar and Rajasthan are [reducing the size of](#)

[official motorcades](#) and [actively promoting the use of public transit](#). The energy crisis poses a direct threat to India's GDP by triggering a massive, [oil-driven trade deficit and systemic inflationary impact](#). This situation simultaneously spikes energy costs and disrupts vital fertilizer imports, resulting in the contraction of the industrial output and agricultural productivity. While these immediate actions demonstrate a comprehensive and proactive approach, the current geopolitical landscape presents a strategic opportunity for India to do more than just manage the crisis. As a leading analyst [has demonstrated](#), energy security for India is not merely an episodic concern but a systemic imperative. Therefore, the ongoing conflict should be viewed not only as a crisis demanding resilience, but also as an [opportunity for diversifying India's energy imports](#) and building greater redundancy into its supply chains. This is essential for maintaining India's strategic balance and its ability to pursue its regional security posture, both of which are intrinsically linked to ensuring a stable and secure energy supply.

The “Mission 500” Trade Target and Hydrocarbon Integration

In this context, the strategic partnership with the United States emerges as a pivotal and promising avenue for enhancing India's energy security. In February 2026, the bilateral energy relationship achieved a historic milestone with the announcement of an Interim Trade Agreement. Anchored in the broader [“Mission 500”](#) objective—which aims to double total bilateral trade to \$500 billion by 2030—India committed to significant purchases of U.S. energy resources, including crude oil, Liquefied Natural Gas (LNG), and coking coal over a five-year period. This aligns closely with U.S. objectives to become India's leading supplier of hydrocarbons, helping India safely pivot away from volatile and heavily sanctioned global suppliers such as Russia, Iran, and Venezuela.

Corporate alignment is already following this diplomatic framework. A landmark deal between Indian petrochemical giant Reliance Industries Limited and the United States government for the [construction](#) of a new refinery in Brownsville, Texas, signals a new era in cross-border energy infrastructure. Additionally, the recent [arrival](#) of the American Liquefied Petroleum Gas (LPG) tanker, [Pyxis Pioneer](#), at the Mangalore Port with 16,714 metric tons of LPG underscores the growing energy linkages between the United States and India. The United States could [“emerge as a natural partner”](#) to India in LPG and LNG supplies.

The current international armed conflict has created a unique opportunity for India and the United States to expand their collaboration across a diverse range of energy sources. This is crucial for [maintaining](#) India's high economic growth trajectory. The impetus for this partnership has been reinforced by the United States, with Deputy Secretary of State Christopher Landau [pitching the U.S.](#) as a reliable “supplier of energy” to India at the recent [Raisina Dialogue](#) gathering in New Delhi in March 2026.

Concrete actions have followed since this announcement with India and the United States [concluding](#) a one-year structured contract to import 2.2 million tons of LPG per year from the

Gulf Coast of the United States. Notably, India [currently sources](#) 10% of its LPG needs from the United States, a significant figure given India's [greater vulnerabilities](#) in the LPG sector compared to oil. Also, the United States has expressed firm support for India's bid to [join](#) the [International Energy Agency as a full member](#).

These engagements are a direct operationalization of the India-U.S. Strategic Energy Partnership (SEP), a [major component](#) of the broader bilateral relationship that has fostered an [all-pervasive energy security partnership](#) since 2020. In a significant move to build trust, India and the United States have [discussed](#) the possibility of India storing its oil in the U.S. Strategic Petroleum Reserves.

Energy Innovation and the TRUST Initiative

Beyond traditional fossil fuels, the partnership is rapidly evolving to encompass the energy transition of the future. A major highlight from 2025 is the focus on the [TRUST \(Transforming the Relationship Utilizing Strategic Technology\)](#) initiative, a forward-looking framework designed to expand cooperation in emerging technologies, including energy infrastructure and grid modernizations.

Additionally, the two nations have launched the [US-India Roadmap to Build Safe and Secure Global Clean Energy Supply Chains](#). This roadmap targets the unlocking of \$1 billion in multilateral financing to support critical projects across the renewable energy value chain, including advanced energy storage, zero-emission vehicles, and high-efficiency cooling systems. The United States remains a foundational participant in the [Global Biofuels Alliance](#), continuing to support India as a leader in [Sustainable Aviation Fuel](#) (SAF) and [Compressed Biogas](#) (CBG) development.

Looking ahead, these engagements offer numerous opportunities for future collaboration. A [precedent](#) for successful joint research was set in 2016 when the United States Geological Survey (USGS) and India's Oil and Natural Gas Corporation (ONGC) discovered the largest deposit of potentially producible gas hydrate in the Krishna-Godavari Basin. By combining forces under initiatives like TRUST, India and the United States can unlock new energy sources, diversify their energy supply chains, and create robust employment opportunities across both countries. This deep-rooted engagement in India's energy sector will also allow the United States to become a strong energy partner.

At a time when the India-U.S. partnership enjoys strong bipartisan support and extends from the ["seabed to the stars,"](#) the oceanic and energy domains continue to offer immense opportunities. Further exploration and cooperation in these areas will not only boost burgeoning bilateral ties but also sustain the ["habits of cooperation"](#) that are essential for navigating future crises and reinforcing mutual trust, especially in the energy sector.

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