Ras Laffan Attack: How Ras Laffan Attack Threatens India’s Energy Security

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Ras Laffan Attack Latest News

- Iranian missiles struck **Ras Laffan Industrial City**, Qatar — home to the world’s biggest LNG facility — hours after Israel hit South Pars, the world’s largest natural gas field shared between Iran and Qatar.
- The attack has major implications for global LNG supply and India’s energy security.

The Attack & Its Escalation

- Israel struck **South Pars gas field;** Iran retaliated by targeting energy infrastructure in Saudi Arabia (Samref refinery, Yanbu), Kuwait, and **Qatar’s Ras Laffan**.
- Ras Laffan accounts for roughly one-fifth of global LNG supply — its production, liquefaction, and export units are all concentrated there.
- Brent crude, already above $100/barrel, briefly hit $119 before settling at ~$112 — about 50% above pre-war levels.

- Qatar had already suspended LNG production earlier this month following a smaller attack; the latest strikes caused sizable fires and extensive damage.

Why Ras Laffan Strike Matters

- Unclear how long gas output will take to normalise even if the war stops.
- Concerns have moved **upstream** to production and supply infrastructure, not just transit routes.
- US President Trump stated Washington had no advance knowledge of the Israeli attack and warned Israel against further strikes on South Pars, threatening to **“blow up the entirety”** of South Pars if Qatar’s LNG facilities were attacked.
- **Strategic Importance of Ras Laffan**
  - Ras Laffan accounts for roughly **one-fifth** of global LNG supply.
  - Disruptions here directly affect global LNG flows and energy security.
  - Qatar had already suspended production temporarily after earlier attacks.

Why Ras Laffan Matters for India

- India imports ~88% of crude oil and ~50% of its gas needs
- Qatar supplies ~**one-third of India’s LPG and nearly half of its LNG**
- Earlier disruptions were limited to Strait of Hormuz shipping delays; now, physical damage to processing facilities makes recovery far slower and uncertain

India’s LNG Dependency

- Qatar is India’s **largest LNG source** — India depends on LNG for roughly half its natural gas demand.
- Over **two-fifths of India’s LNG** comes from Qatar, almost entirely from Ras Laffan.
- In 2024–25, India imported 27 million tonnes of LNG; 11.2 million tonnes (41.4%) came from Qatar.
- QatarEnergy’s production capacity is 77 million TPA, expanding to ~81 million TPA by 2025.

Impact on Long-Term Gas Contracts

- India’s major energy firms hold long-term supply agreements with Qatar:
  - Petronet LNG imports about 7.5 million tonnes per annum (MTPA)
  - GSPC imports around 1 MTPA
  - GAIL imports smaller volumes
- India consumes **~189 MMSCMD** of natural gas but produces only **~90 MMSCMD** domestically.
- Gulf import disruptions and force majeure declarations are now squeezing the gap.

Broader Economic Implications for India

- Rising fuel costs may increase inflation and fiscal pressure.
- Government and oil companies may have to absorb price shocks.
- LPG shortages and delays indicate early signs of domestic stress.

Qatar as a Trade Partner — Added Stakes

- Bilateral trade touched $**14 billion+** in 2024–25, dominated by energy
- India imports LNG, LPG, and petrochemicals; exports cereals, machinery, and metals
- A prolonged conflict risks disrupting both energy supply and trade balance

India Diversifying Away from the Gulf

- Previously, ~60% of LPG imports came from Qatar, UAE, Saudi Arabia, and Kuwait. India is now sourcing from: **US, Norway, Canada, Algeria, and Russia**
- This reduces geopolitical risk but **raises costs** due to longer shipping routes.

Source: IE | ToI | TSG
