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GS 3: INDIAN ECONOMY

INDIAN EXPRESS PAGE: 12

• ECONOMY

Why Iran war threatens India's fertilisers supply



FERTILISERS ARE food for crops. They supply essential nutrients such as nitrogen (N), phosphorus (P), potassium (K) and sulphur (S) for them to yield grains, fruits or vegetables. India is self-sufficient in the production of most food and non-food crops, barring oilseeds pulses. But this isn't so with fertilisers.

In 2025-26 (April-March), India is expected to import nearly 10 million tonnes (mt) of urea and 6.5 mt of di-ammonium phosphate (DAP), as against domestic production of 30 mt and 3.5 mt respectively. The country's entire projected 3 mt consumption of muriate of potash (MOP) would be imported, while in complex fertilisers — which contain N, P, K and S in different combinations — domestic production is likely to be 12.5 mt and imports at 4 mt.

The war factor

The accompanying tables show the share of Gulf Cooperation Council (GCC) countries — Oman, Qatar, Saudi Arabia, United Arab Emirates (UAE) and Bahrain — in India's urea imports at roughly 75% during 2024-25.

In DAP, too, the largest source of India's imports is Saudi Arabia. In MOP, the GCC states per se are insignificant suppliers, but it's not so for other West Asian countries such as Jordan and Israel or Turkmenistan (Iran's northern neighbour) are included.

The current US-Israel versus Iran war, in a sense, a reminder of how much India's agriculture and food security is vulnerable to geopolitics.

That becomes more apparent if one factors in Russia (fighting Ukraine) and China. Russia is India's top supplier of MOP and No. 3 in urea and DAP. China was actually India's foremost source of both urea and DAP as late as 2023-24.

Import dependence, moreover, isn't confined to finished fertilisers.

Domestic urea plants run on natural gas as feedstock. The fertiliser sector accounts for close to 29% of India's total natural gas consumption. Just over half of India's natural gas consumption requirement is met by imports. India imported 27 mt of liquefied natural gas (LNG) in 2024-25, out of which

• Imports of Urea

	2024-25	Apr-Dec 2025
Oman	29.56	15.27
Qatar	9.79	7.11
Russia	9.24	11.94
Saudi Arabia	5.98	5.75
UAE	5.01	4.04
Nigeria	2.83	2.67
Malaysia	1.91	3.07
Bahrain	1.34	1.2
Indonesia	1.18	6.21
China	1.04	11.05
Egypt	0.47	1.93
Georgia	0.44	1.24
Vietnam	0.08	1.86
Finland	0	3.35
Algeria	0	1.69
TOTAL*	69.1	87.24

All figures in lakh tonnes. *Includes other countries. Source: Department of Commerce

11.2 mt came from Qatar, 3.5 mt from UAE and 1.8 mt from Oman. During April-December 2025, the 19.9 mt of imports included 9 mt from Qatar, 2.1 mt from UAE and 1.2 mt from Oman.

It's worse with DAP, MOP and complex fertilisers. India hardly has any mineable rock phosphate (for P), potash (K) or elemental sulphur (S) reserves. Out of the 2.5 mt ammonia imports in 2024-25 (2 mt in April-December 2025), almost 1 mt (0.8 mt) was from Oman, 0.9 mt (0.7 mt) from Saudi Arabia and 0.2 mt (0.06 mt) from Qatar.

The intermediates for manufacturing DAP, India's second most-consumed fertiliser after urea, are phosphoric acid and ammonia. Phosphoric acid is primarily sourced from Jordan, Senegal, Morocco, China and Tunisia. Thankfully, not all (save Jordan) are involved in the ongoing Iran and Russia-Ukraine wars.

Some Indian DAP manufacturers have own phosphoric acid plants, for which the raw materials (rock phosphate and sulphur) are again imported. Imports of rock phosphate are from Jordan, Egypt, Morocco, Togo, UAE, Senegal, Algeria and Lebanon; and of sulphur from Oman, UAE, Qatar, Kuwait and Saudi Arabia.

• Imports of DAP

	2024-25	Apr-Dec 2025
Saudi Arabia	18.96	24.22
Morocco	10.76	15.9
China	8.43	5.58
Russia	2.69	6.94
Jordan	2.38	1.67
Australia	1.92	4.13
UAE	-	0.72
TOTAL*	45.6	60.08

• Imports of MOP

	2024-25	Apr-Dec 2025
Russia	16.88	11.62
Canada	12.32	7.24
Turkmeristan	5.41	3.36
Jordan	3.61	1.81
Israel	3.1	1.79
UAE	0.63	0.98
TOTAL*	43.16	27.22

At stake

The share of Oman, Qatar, Saudi Arabia, UAE, and Bahrain in India's urea imports was roughly 75% during 2024-25.

The war is a reminder of how much India's agriculture and food security is vulnerable to geopolitics.

Stocks are comfortable for now and the next crop season is three months away. But a long West Asia war could pose a major challenge

The subsequent stock build-up happened because of large-scale imports, both of urea and DAP. India has also bought more material from less-prolific suppliers such as Indonesia, Malaysia, Egypt, Finland, Vietnam and Algeria for urea and Australia for DAP (see tables).

Stocks aside, the next kharif (monsoon) planting season will kick off only from mid-June. "We are at present just about harvesting wheat, mustard and other rabi crops. The prepositioning of stocks for the upcoming kharif can be appropriately planned," Prasad added.

Uncertainty challenge

That mild comfort would be short-lived if the war stretches beyond March.

Most urea plants are operating at about 60% capacity due to inadequate gas availability. Some — like Chambal Fertilisers & Chemicals' Godepali-II unit at Kota (Rajasthan), Indorama India's at Jagdishpur and Hindustan Urvarak & Rasayan's at Gorakhpur (both in Uttar Pradesh) — have gone in for annual routine maintenance shutdown ahead of the peak marketing season.

"We'll have a problem if LNG supplies from Qatar Energy and Abu Dhabi National Oil Company dry up. These companies, along with Saudi Aramco, are also big exporters of sulphur. Their LNG and sulphur — besides ammonia from Qatar Energy and Saudi Arabia's Maaden and SABIC — is all shipped through the Strait of Hormuz," the CEO of a leading domestic fertiliser company said.

According to him, the closure of the Strait will mainly affect the flow of LNG, ammonia and sulphur. Finished fertilisers can continue to come through the Black Sea-Turkish Straits-Mediterranean-Suez Canal-Red Sea-Indian Ocean route or via the Cape of Good Hope. "We will have to also look for more LNG from the US, Australia, Angola and Cameroon and ammonia from Indonesia, Malaysia and China," the official pointed out.

Out of India's total natural gas consumption of 58,802 mmscm (million metric standard cubic meters) during April-January 2025-26 the top three segments were fertilisers (16,812), city gas distribution (13,699) and power (6,898).

In the event of worsening disruptions from West Asia, the government may choose to preserve the allocations of the first two segments, for food security and ensuring uninterrupted supply of clean cooking and transport fuel for consumers.

Russia was a major exporter of ammonia and sulphur. Its ammonia exports collapsed after a 2,471-km pipeline connecting Togliatti in Russia to the Ukrainian Black Sea port of Odesa — through which some 2.5 mt of the liquefied chemical passed annually — suffered damage during the war. Ukrainian drone attacks on its oil refineries have, likewise, led to production losses and a ban on exports by Russia. The result: Landed prices of imported sulphur in India have surged to around \$550 per tonne, from \$250 levels a year ago.

The brighter side

For now, India has a comfortable stocks position. "February-end urea stocks, at 5.5 mt, are above the 4.9 mt for the same date of 2025. The same goes for DAP (2.5 mt versus 1.3 mt) and complexes (5.4 mt versus 3.2 mt)," G Ravi Prasad, a fertiliser industry veteran, noted.

The situation was quite precarious at the start of this rabi (winter-spring) cropping season. On October 1, 2025, urea stocks were a mere 3.7 mt, compared with 6.3 mt on October 1, 2024. DAP stocks were higher though (2 mt versus 1.2 mt), while unchanged at 3.6 mt for complex fertilisers.

GS 2: INDIAN POLITY

THE INDIAN EXPRESS PAGE : 12

• POLITY

Electing a Rajya Sabha member: The rules, process, and politics

Vikas Pathak

New Delhi, March 8

THE ASSEMBLIES of 10 states will elect 37 MPs to Rajya Sabha on March 16. This time, the most prominent contestant is JD(U) leader Nitish Kumar who, in a surprise move, has decided to step down as Bihar chief minister after a 21-year tenure.

How are Rajya Sabha members elected?

Rajya Sabha has up to 250 members, 12 of whom are nominated for their special knowledge of literature, science, art or social service. The others are elected.

Unlike Lok Sabha, whose members are directly elected by citizens aged 18 and above, Rajya Sabha members are elected by state Assembly members through the system of proportional representation by a single, transferable vote.

Rajya Sabha MPs representing Delhi and Puducherry are elected by members of an electoral college comprising the MLAs of these Union territories. The Union territories of the Andaman and Nicobar Islands,

Lakshadweep, Dadra and Nagar Haveli, Daman and Diu, Chandigarh, and Ladakh do not have representation in Rajya Sabha. Jammu & Kashmir, however, does.

Who can be a Rajya Sabha MP?

The minimum age to be a Rajya Sabha MP is 30, while for the Lok Sabha, it is 25. Also, a person qualified to be chosen as a representative of any State or Union territory must be an elector for a parliamentary constituency in that State or territory, say MN Kaul and SL Shaktiher in their book *Practice and Procedure of Parliament*.

The term of a Rajya Sabha member is six years, and one-third of the members retire every two years. This ensures continuity, as Rajya Sabha is a permanent body that is never dissolved, unlike the Lok Sabha.

How does the election process begin?

For filling the seats of members retiring from Rajya Sabha on the expiration of their term, the President, "by one or more notifications published in the Gazette on such date or dates as may be recommended by the Election Commission, calls upon the

Winning math

• A party first calculates the quota required to win a seat. Then it counts its MLAs. So, if it has 100 MLAs and the quota is 41, it will tell each of its MLAs which candidate to vote for in such a manner that 82 MLAs ensure the victory of two candidates.

• Its third candidate will get 18 first preference votes and is unlikely to win. But parties try to ensure cross-voting or to convince independents or smaller parties to vote for such candidates.

elected members of the Legislative Assembly or, as the case may be, the members of the electoral college of the State concerned to elect members of the Rajya Sabha in accordance with the provisions of the Representation of the People Act, 1951, and of the rules and orders made thereunder," say Kaul and Shaktiher.

How many votes does a candidate need to win an election?

This depends on the strength of the Assembly of the state concerned. States with high populations have more seats.

A formula is used to calculate the quota required for a candidate to win. The total number of MLAs voting in a state is divided by the number of seats going for elections plus 1. Then, 1 is added to the resulting number to calculate the quota.

For example, say the total number of MLAs voting in a state is 200 and elections are on for four seats. In that case, 200 will be divided by 4+1, or 5, which will result in a figure of 40. The quota thus will be 40+1, or 41. Any candidate getting 41 votes will be declared elected.

However, the system followed is that of a single transferable vote. So MLAs who vote — there is an open ballot in Rajya Sabha polls — can mark their first, second, third, etc. preferences.

In the above example, every candidate getting 41 first preference votes will be declared elected. If this does not fill all the seats, the surplus votes of those already elected are transferred to the second preference candidates of MLAs whose first preferences have already won.

So, let's go back to the above example where 41 is the winning quota.

If a winning candidate secures 45 votes, this would mean this candidate has four surplus votes. These four surplus votes will be moved to the second preference candidates. If more than one victorious candidate has surplus votes, the largest surplus will be transferred first.

If even this does not fill all vacancies, the candidate with the lowest number of first preference votes is eliminated, and the second preference votes in her ballot paper are transferred. This process goes on until all seats are filled.

GS 2: INTERNATIONAL RELATIONS

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• NEIGHBOURHOOD

'Poll results sea change in Nepal politics... RSP would be keen to partner with India'



EXPERT EXPLAINS

RANJIT RAE

FORMER AMBASSADOR TO NEPAL

SIX MONTHS after Gen Z protests unseated the coalition government led by K P Sharma Oli, Nepal went to polls on Thursday. The Rastriya Swatantra Party (RSP), with rapper-turned-politician Balendra Shah, 35, as its prime minister candidate, has won 120 of the 165 directly elected seats. He also defeated four-time PM Oli, of the Communist Party of Nepal (UML), by about 50,000 votes in his constituency. Ranjit Rae spoke to Anagha Jayakumar about the implications of the results.

How do you read the results?

It is a sea change. The RSP was formed in 2022. Balen Shah entered politics as the Kathmandu mayor just a few years ago. This kind of victory was not expected by anybody, perhaps not even the RSP.

There was anger against the Oli regime, particularly after the killings of students during the protests last year. The outcome, I think, is a catharsis for the people of Nepal. They have rejected the older generation of leaders, and it absolutely has to do with the demography. The median age is around 25 years. Almost eight or nine million Nepalese are working abroad in India, the Gulf, and Malaysia. They see developments in other countries and compare them with their own. A government that does not respond to the aspirations of young people with sincerity faces the kind of heat the regime faced.

For three decades, politics was a game of musical chairs where three leaders — Oli of the CPN (UML), Prachanda of the Nepali Communist Party and Sher Bahadur



RSP supporters outside the Election Commission in Kathmandu. PH

Deuba of the Nepali Congress — took turns as the prime minister. These establishment parties have now been reduced to a small

presence. The last coalition was an unusual alliance of the Nepali Congress and the CPN (UML). As a result, there was virtually no opposition within Parliament; the opposition was on the streets.

What were the major electoral issues, and what task does the RSP face?

Fundamentally, it was about the lack of jobs and economic opportunities, which is also why a third of the people are moving abroad. Nepal has become a remittance economy. Second was the issue of corruption, and that cases were not followed up because they involved important political leaders. The third issue was endemic political instability. Every election since 2015 has seen a coalition government, but this election has disproven that thesis.

The RSP is a party of very young, educated people who have come into politics with an idealistic frame of mind. It was established four years ago by popular TV anchor Rabi Lamichhane.

With a huge mandate, there will be a lot

of pressure on them to show they are better than their predecessors.

Is Balen Shah becoming the first Madhesi prime minister significant?

It is very significant. Balen Shah's first political appearance in Madhesh, a region in southeastern Nepal, was in Janakpur — its political and spiritual centre. He wore the Madhesi *kurti pyjama* and the *dhaka topi*, the symbol of Nepal. He spoke Maithili and projected himself as the son of the soil.

This captured the imagination of the people in the Terai (the region inhabited by the Madhesi people), where the RSP has virtually swept the region. The idea of a Madhesi PM was unimaginable even 10 years ago. This has been a unifying factor that has neutralised political fault lines.

What do the results mean for India and China?

Our connections have historically been with the traditional leadership, but we are reaching out to the younger generation of

leaders as well. One very positive aspect of this election is that the anti-India sentiment that comes up in all Nepalese elections was non-existent.

As far as the RSP is concerned, I think they are progressive, smart people who would like their country to progress economically, and they would be very keen to partner with India in this effort.

India strongly supported Sushila Karki's interim government. We also provided logistical support for the electoral process. PM Modi has issued a statement of support following this election.

China has been keen to develop a strong, unified communist force in Nepal, which this election has completely rejected. There are also worries in Nepal about falling into a heavy debt burden. As neighbours, they will have good relations. But I think China's involvement in bringing communist parties together will likely take a backseat in the foreseeable future.

FULL INTERVIEW ON

[WWW.INDIANEXPRESS.COM/EXPLAINED](https://www.indianexpress.com/explained)

GS 2: INTERNATIONAL RELATIONS

THE HINDU PAGE: 1

Iran clerics choose new Supreme Leader; U.S., Israel strikes set Tehran fuel depots ablaze

Agence France-Press
TEHRAN/DUBAI

Iran was preparing to reveal its new Supreme Leader on Sunday, even as U.S.-backed Israeli air strikes destroyed fuel dumps and triggered fires that choked much of Tehran in a thick blanket of smoke.

The fuel depot strikes are the first time Iranian oil infrastructure has been targeted during the ongoing conflict. While Iranian President Masoud Pezeshkian said on Saturday that the Islamic Republic will not strike its West Asian neighbours unless attacks originated from their territory, Saudi Arabia, the UAE, Kuwait, and Bahrain all reported new attacks on Sunday.

An Indian national was among two killed in Saudi Arabia where a military



Iranian civil defence members next to a destroyed fuel tanker after an air strike on the Shahrin oil refinery in Tehran on Sunday. AFP

projectile fell into a residential area in Al Kharj governorate, the Kingdom's civil defence said without identifying the victims.

Iran's clerical body tasked with choosing a successor to Ayatollah Ali Khamenei – who was killed just over a week ago in the strikes that triggered the war – has reached a decision, but is yet to name the new leader. “The vote to

appoint the leader has taken place and the leader has been chosen,” said Ahmad Alamolhoda, a member of the Assembly of Experts, as quoted by Iran's *Mehr* news agency.

Mr. Alamolhoda said the secretariat of the body would announce the name later. Khamenei's name as Iran's leader will continue, Hosseinali Eshkevari, another member of the As-

sembly said on Sunday.

U.S. President Donald Trump warned on Sunday that Iran's next Supreme Leader would not last long without his approval, while Israel said its forces would not hesitate to target the new chief and members of the council that met to confirm him.

As the war entered its ninth day, Iran's Revolutionary Guards said they had enough supplies to continue their drone and missile war over West Asia for up to six months. Iran had so far used only first- and second-generation missiles, but would use “advanced and less-used long-range missiles” in the coming days, it added.

Israel's reach was underlined by two new operations overnight: strikes against fuel dumps in and around Tehran, and an at-

tack on a hotel in the heart of Lebanon's Beirut.

Warplanes hit five oil facilities in overnight strikes in and around the Iranian capital, killing four people, the CEO of the national oil products distribution firm told state television. Tehran's Governor told the *IRNA* news agency that fuel distribution had been “temporarily interrupted”.

While the Iranian President reiterated his warning that the country “will be forced to respond” against its neighbours if their territory was used to attack it, Saudi Arabia intercepted a wave of drones, Kuwait said an attack hit fuel tanks at its international airport, Bahrain reported a water desalination plant had been damaged, and the UAE said it thwarted incoming missiles.

GS 3: INDIAN ECONOMY

THE HINDU PAGE: 4

India taps alternative crude supplies as conflict in West Asia drags on

Refiners are looking to procure additional cargoes from the U.S., Russia and West Africa to shore up their supplies; refineries have deferred planned maintenance shutdowns to create buffers; analysts warn of rising cost structure of the alternatives

Press Trust of India
NEW DELHI

Indian refiners have begun negotiating for additional crude cargoes from the U.S., Russia and West Africa to ensure supplies remain adequate in the event the West Asia conflict drags on for a longer period, industry officials and analysts said.

Refineries, which convert crude oil into fuels such as petrol and diesel, have deferred planned maintenance shutdowns and are maintaining normal processing rates to create buffers to meet the country's requirement in the near term, they said.

India imports about 88% of its crude oil requirement, with roughly half of those supplies in February passing through the Strait of Hormuz, the narrow sea lane between Iran and Oman that serves as a key energy transit route for global markets.

The recent military strikes by the U.S. and Israel on Iran, and Tehran's



Brief window: The waiver on the sale and delivery of sanctioned Russian oil is valid till April 5, offering India another source. REUTERS

retaliatory attacks on U.S. bases in neighbouring countries as well as Israel, have sharply escalated tensions in the region, leading to a near halt in tanker movements through the strategic waterway.

"Non-strait sources are fully operational and we are sourcing more and more supplies from non-conflict zones," a top oil Ministry source said. "Non-strait sources accounted for 60% of supplies in 2025, which – after the Middle East conflict – climbed to 70%."

Indian refiners are tapping crude from West Africa, Latin America and the U.S., he said, adding that the U.S. Treasury Department issuing a 30-day waiver to allow the sale and delivery of sanctioned Russian oil that has already been loaded on vessels to India has opened up another avenue.

The waiver permits the sale, delivery or discharge of crude oil and petroleum products of Russian origin that were loaded onto vessels on or before March 5, including ships subject to

certain sanctions. The exemption remains valid until April 5, allowing cargoes already in transit to be completed without violating sanctions restrictions.

There are 120 million barrels of Russian crude on the water. Of this, as many as 15 million barrels of Russia-origin crude are sitting on tankers close to India – in the Arabian Sea and Bay of Bengal – while another 7 million Russian crude barrels are idling near Singapore.

Industry sources said Indian refiners have started buying Russian oil. Reliance Industries, Hindustan Petroleum Corporation Ltd., and HPCL-Mittal Energy Ltd. have returned to the market to secure Russian cargoes, they said.

The Oil Ministry official said India never stopped buying Russian oil – it imported some 1.04 million bpd (barrels per day) of Russian crude in February. "We are in a very comfortable position as far as crude and finished products are concerned," he said, adding

the combined inventory can meet the country's demand for 50 days.

Challenges ahead

While India may be able to secure adequate physical crude through alternative sources, analysts cautioned that the overall cost structure could worsen due to higher crude prices, increased freight and insurance premiums, and longer shipping routes.

International crude oil prices have jumped to over ₹92 per barrel from around ₹70 when the U.S. and Israel attacked Iran on February 28. Liquefied natural gas (LNG) prices have more than doubled to ₹24-25 per million British thermal unit.

Every ₹10 increase in crude prices could add 20-25 basis points to the consumer price index if passed on to consumers, or widen the fiscal deficit if taxes are cut to neutralise the impact. The immediate impact will be a higher import bill, a widening current account deficit and pressure on the rupee.