

LPG VULNERABILITY IN THE SHADOW OF THE WEST ASIA CONFLICT

A wake up call for India's Energy Future

April 2026

Building a Resilient and Self-Reliant Energy Future for Viksit Bharat@2047



India's ongoing LPG supply disruption is not merely a transient challenge; it reflects deeper structural realities within a rapidly evolving energy system. Recent developments in West Asia have underscored the importance of resilience for a nation of India's scale and ambition. The implications have been felt across households, small businesses, and industry, reinforcing the need for stronger long-term preparedness.

India's response must remain measured and strategic. Abrupt shifts in sourcing or policy risk unintended disruptions across supply chains and end-user segments. The priority, therefore, is to build a stable transition pathway that reduces import dependence while strengthening domestic capabilities and ensuring reliable access for all sections of society. This is also a wake-up call to work overtime with single mindedness towards building a robust Natural Gas ecosystem in the country which beyond reaching the envisioned share of 15% in national energy mix, also helps provide added protection in a disruptive situation like the one the country is facing. At its core, this transition must begin with energy efficiency as the first principle, followed by a systematic scaling of domestic endowments such as compressed biogas (CBG), green hydrogen and other biofuels for which natural gas ecosystem can play the role of anchor, besides continuing adding capacities in wind, and solar. India will also require smart solutions by commissioning low carbon technologies to harness full potential of coal. India also needs to be mindful to avoid the trap of becoming hostage to the far more restricted supply chains in renewables and especially the Electric vehicles where the dominance of one or very limited number of supply sources could jeopardize Indian growth aspirations. A blend and mix of all sources of energy with adequate cushion is the way to go for India, with energy efficiency at core of all national plans. Alongside natural gas, India must scale integrated renewable energy systems supported by long-duration storage to deliver reliable, round-the-clock power and reduce structural import dependence.

The long-term direction is clear. India must be energy secure, economically resource-agnostic, and progressively green by Viksit Bharat 2047. The future lies in solar and nuclear energy, supported by a diversified mix that reduces vulnerability to external systems and geopolitical shocks. India must move from being energy-hungry to becoming an energy-producing nation, leveraging its natural and technological strengths. India will require multiplicity of solutions and in fact that guarantees solidity of overall solution matrix to help navigate the turbulent times like this, which are bound to be encountered, though manifesting differently at different points in time.

Achieving this vision will require both structural depth and operational agility. Strengthening domestic storage and connectivity infrastructure will be critical to ensuring reliability and flexibility across the energy value chain. At the same time, existing inefficiencies such as underutilised CBG plants must be addressed to unlock latent capacity within the system. A calibrated expansion of the PNG network, distributed storage solutions, and localised energy ecosystems will further enhance resilience.

Ultimately, India's energy future will be shaped not only by external dynamics but by the strength of its internal systems, innovation capacity, and policy direction. This Point of View seeks to contribute to a forward-looking dialogue that moves beyond immediate responses towards building a resilient, self-reliant, and future-ready energy architecture.



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| | | |
|----------|---|----|
| 1 | Introduction | 07 |
| 2 | Impact of the West Asia Crisis | 11 |
| 3 | Government's Response to the Crisis | 13 |
| 4 | Primus's Perspective | 14 |
| 5 | Closing the Loop: From LPG Crisis to Energy System Resilience | 17 |
| 6 | Conclusion | 18 |

Contents

List of Abbreviations

| Abbreviation | Full Form |
|--------------|---|
| LPG | Liquefied Petroleum Gas |
| PNG | Piped Natural Gas |
| LNG | Liquefied Natural Gas |
| CBG | Compressed Biogas |
| PMUY | Pradhan Mantri Ujjwala Yojana |
| PPAC | Petroleum Planning & Analysis Cell |
| MoPNG | Ministry of Petroleum and Natural Gas |
| OMCs | Oil Marketing Companies |
| IOCL | Indian Oil Corporation Limited |
| BPCL | Bharat Petroleum Corporation Limited |
| HPCL | Hindustan Petroleum Corporation Limited |
| DAC | Delivery Authentication Code |
| MSME | Micro, Small and Medium Enterprises |
| CPI | Consumer Price Index |
| MMT | Million Metric Tonnes |
| VLGC | Very Large Gas Carrier |
| ONGC | Oil and Natural Gas Corporation |
| HELP | Hydrocarbon Exploration and Licensing Policy |
| SATAT | Sustainable Alternative Towards Affordable Transportation |
| DCU | Daughter Compression Unit |
| ISPRIL | Indian Strategic Petroleum Reserves Limited |
| RCD | Railway Consumer Depot |

Introduction

The ongoing West Asia conflict has disrupted maritime movement through one of the world's most critical energy corridors, through which India sources majority of its cooking gas, exposing a vulnerability that has been decades in the making. With over 330 Million households dependent on LPG for daily cooking, the consequences reach into kitchens, restaurants, factories, and the broader economy.

India is the world's 2nd largest LPG consumer, accounting for roughly one-tenth of global annual consumption. Monthly demand runs at ~2.7-3.1 Million Tonnes (MMT), but domestic production meets barely 38-40% of this need. The rest i.e ~60% is imported, with the bulk sourced from the Persian Gulf (UAE, Qatar, Saudi Arabia, Kuwait, etc.) and transiting through a single maritime chokepoint now sitting at the centre of an active conflict.



The Strait of Hormuz sits at the centre of the world's hydrocarbon trade. In 2024, around 20 million barrels per day of oil moved through the strait, equivalent to roughly 20 percent of global petroleum liquids consumption, making it one of the world's most critical oil transit chokepoints.

~31 MMT

Annual LPG consumption

~60%

Met through imports

~85-90%

Imports via Strait of Hormuz

No

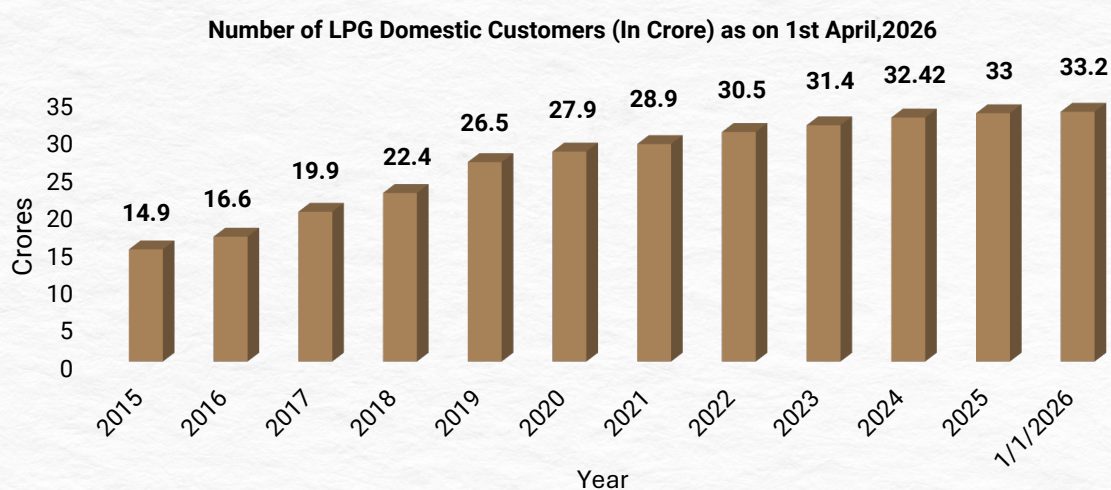
Strategic LPG Reserve

Structural Drivers of Vulnerability

A. Demand Expansion Without Supply Resilience

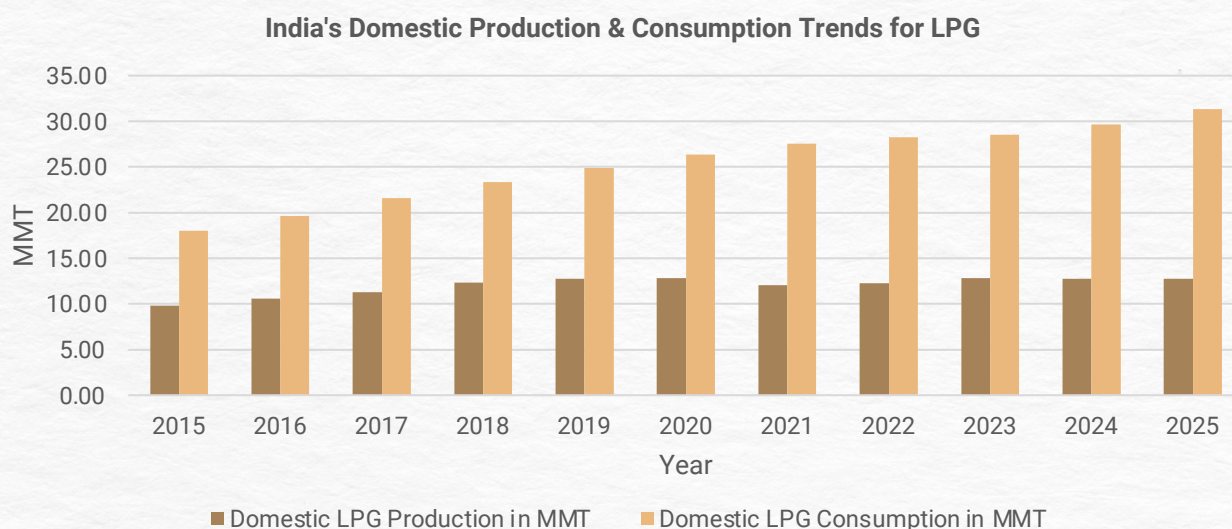
LPG consumption in India doubled from 15MMT in 2012 to 31MMT in 2025, driven primarily by Pradhan Mantri Ujjwala Yojana (PMUY) that connected rural and low-income households to clean cooking fuel. This success also underscores the need to build storage, diversify supply, and prepare alternative fuels in parallel. India today operates an LPG supply chain that is highly efficient under stable conditions, while presenting an opportunity to further strengthen resilience against external disruptions.

Fig 1: Year-wise increase in Domestic LPG Customers



(Source: PPAC, Primus Analysis)

Fig 2: Year-wise Domestic Production & Consumption Trends



(Source: PPAC, Primus Analysis)






B. The Hormuz Chokepoint

Over 85% of India's LPG imports transit the Strait of Hormuz, a 33-kilometre-wide waterway at the heart of the West Asia War zone. Qatar and UAE supply about 34% and 26% of India's LPG respectively; the rest is shared by Kuwait and Saudi Arabia. All Gulf routes pass through the strait, which when disrupted leave no rapid alternative.

It is clear that there's a geographic concentration of supply particularly from the Strait of Hormuz. Under normal conditions, this route offers logistical efficiency, with transit times ranging between 5-8 days. However, the current crisis has demonstrated the risks of such concentration.

Alternative suppliers, like those in the US and Argentina, take a lot longer to deliver, often more than 40 days. This makes it difficult to quickly find new sources of supply when there is a supply disruption.



| | Supplier | Share | Route | Transit |
|---|---------------|-------|---------------------|------------|
|  | Qatar | ~34% | Strait of Hormuz | 6–8 days |
|  | UAE | ~26% | Strait of Hormuz | 5–7 days |
|  | Kuwait / KSA | ~16% | Strait of Hormuz | 5–8 days |
|  | United States | ~10% | Cape of Good Hope | 40–50 days |
|  | Australia | Minor | Direct Indian Ocean | 10–15 days |

C. Storage Constraints

India doesn't have strategic reserves for LPG, unlike crude oil. OMCs' commercial stocks are meant to keep things running smoothly, not to build up, and they only cover less than two days of national consumption. This makes the system very vulnerable to short-term supply shocks.



D. The Blend Problem

Fuel compatibility is another important but less obvious limitation. India's consumption patterns are set up for a butane-heavy LPG blend that mostly comes from the Gulf. Suppliers like the US, on the other hand, make propane-heavy LPG that needs to be blended before it can be used in the homes. This necessitates specialized blending infrastructure at export or import terminals, which is presently constrained. This slows down and limits the amount of Atlantic Basin supplies that can add to Gulf-linked volumes.

E. Absence of Firm Renewable Alternatives at Scale

Time and again there have been discussions on diversification away from LPG but there is a structural constraint in the limited availability of firm, dispatchable renewable energy. Industrial and commercial LPG demand cannot be fully met by intermittent solar and wind without storage backed integration. India needs to have large-scale, home grown, long-duration storage solutions to accelerate the transition from import-dependent fuels to domestically anchored clean energy systems.



Impact of the West Asia Crisis

Supply Deficits

Weekly LPG imports fell by ~30-40% in the immediate aftermath of the disruption. With normal monthly demand at ~2.8 to 3.0 MMT and domestic production ~1.2 MMT, the shortfall has created the need for immediate rationing.

A rough supply balance as of mid-March 2026 put available supply at approximately ~1.6 MMT, sufficient only for roughly 22 days of reduced demand, itself down 15–16% from normal levels due to rationing and price effects.

Economic Consequences

A ₹60 increase in the price of a 14.2 kg domestic LPG cylinder (now ₹913 in Delhi), along with a ₹195 rise in the 19 kg commercial cylinder (now ₹2078.5 in Delhi), has come at a time when Brent crude has crossed \$100 per barrel. These factors are starting to push up overall prices. CPI inflation, which was 3.40% in March 2026, is expected to rise to average 4.6% for the current fiscal.

The black market has also been proliferating

Domestic LPG cylinders listed at ₹950 are reportedly being sold at ₹2,000–3,000 in informal market while commercial cylinders listed at ₹1,800 have reached prices of upto ₹6,000. Daily booking volumes have also spiked from 55.7 lakh to 88.8 lakh as on 14 March.

Sectoral and Human Level Impacts

The LPG disruption has had distinct impact on the citizen. Prioritized allocations have mostly protected household consumption, but the pressure has moved to the commercial, industrial, and informal sectors. There, supply problems and rising costs are starting to cause economic stress and inflation that is spreading to other areas.



The Crisis has resulted in domino effect on many areas. The shift of LPG toward household use has made it less available for industry, which has forced some units to cut back on their operations. The steel industry has raised concerns about the risks to production continuity, margins, and contractual obligations. At the same time, industries that depend on LPG, such as ceramics, furnaces, and engineering units, have started to switch to more expensive options like diesel. Because of this, some factories have been running below capacity, and some even closed for a short time during the worst of the disruption. This also points to a deeper problem: lack of access for industrial users to reliable, round-the-clock (RTC) renewable power. Fuel switching in crises leans towards more carbon-intensive and expensive alternatives rather than cleaner options, in the absence of storage-backed renewable solutions.

- The government's decision to prioritise household supply has displaced the shortage almost entirely onto the commercial sector.
- Restaurants, food stalls, hotels, and caterers had their gas supply cut by 30–50% and said they lost 25–30%.
- Thousands of businesses closed in big cities.
- The number of food delivery orders dropped by 50–60%.
- MSMEs in Coimbatore, Ambattur, and Morbi cut back on production.
- The prices of petrochemicals went up by 31% to 67% when imports of raw materials from the Gulf stopped.
- Small restaurants, bakeries, and street vendors have closed or cut back on their business because the price of commercial LPG went up to about ₹5500.

Environmental Impact

The LPG shortage has pushed hotels and catering units to shift towards firewood, with prices reportedly rising from around ₹2/kg to nearly ₹6/kg. Waste wood that was earlier used in limited applications is now being widely used for cooking, increasing reliance on biomass and contributing to higher local air pollution. This moves away from the vision under Pradhan Mantri Ujjwala Yojana, which aimed to move households and small consumers away from traditional fuels towards cleaner LPG-based cooking.



Government's Response to the Crisis

Emergency Domestic Measures

The LPG Control Order issued on 8 March 2026 under the Essential Commodities Act required refineries to maximise LPG output by directing all C3 and C4 hydrocarbon streams exclusively to the three Oil Marketing Companies IOCL, BPCL and HPCL. This resulted in a ~28 to 40 % increase in domestic production, with daily output rising to about 50,000 tonnes by the end of March.

On the demand side, a booking gap of 25-days was introduced in urban areas and auto LPG supplies were redirected to the cooking gas pool. Delivery Authentication Code (DAC) coverage was further enforced requiring consumers to verify each delivery through a one-time code. This reduced the diversion to commercial or unauthorised use and ensured that cylinders reach the prioritized segment i.e. domestic household.

In addition, MoPNG introduced closer scrutiny on LPG spot pricing and allotment trends, in order to curb hoarding and rapid fluctuations in prices. Moreover, specific communication drives were initiated by the government in order to promote fuel switching wherever possible (such as from LPG to PNG).

Diplomatic Breakthroughs

Strategic diplomacy by India has indeed had its impact. On 26th March 2026, Iran has allowed ships belonging to five nations, including that of India, to pass through the Strait of Hormuz. However, the situation still remains tensed. War-risk insurance rates have been shooting up by more than 1,000 %.



Primus's Perspective

A. Short Term: Alternative Supply Chains to Meet Existing Needs

Activating Non-Hormuz LPG Corridors

Three viable non-Hormuz supply corridors can be operationalised in the near term.

01

The Atlantic Basin corridor: A significant sourcing alternative from the US Gulf Coast, Nigeria, and Algeria, routed via the Cape of Good Hope. India already has contracted US LPG volumes of 2.2 MMT per annum, which can serve as a stable anchor. The immediate priority is to fast-track cargo scheduling and expand VLGC (Very Large Gas Carrier) chartering capacity. Argentina, which emerged as a swing supplier in early 2026, may now be formalised into a medium-term supply arrangement.

02

Corridor via Australia: Ships are routed directly across the Indian Ocean with a relatively short transit time of 10–15 days. Despite its logistical advantage, this route remains underutilised and could be contracted as an alternative.

03

Saudi Arabia's Red Sea ports: This corridor runs from Yanbu, Jeddah, and Jizan, through the Bab el-Mandeb, suitable for Gulf-proximate routes away from the Strait of Hormuz. However, reportedly the Houthi activity and security risks makes the scenario complicated.

While diversification across these corridors may increase the landed LPG prices due to longer routes and higher freight costs, it may be considered as necessary trade-off to enhance supply resilience and reduce geopolitical risk. Further, these measures will certainly help in the short term to mitigate supply disruptions, but they will not resolve the underlying problem of structural dependence on imported fuels, which requires the parallel development of reliable domestic energy alternatives.

B. Medium Term: Transition from LPG to PNG

The Government's Natural Gas and Petroleum Products Distribution Order, 2026, notified on 24th March 2026 under the Essential Commodities Act, represents the most significant policy push towards PNG adoption in India's history. It mandates:

- Strict deadlines for pipeline permits which are time bound to prevent infrastructural delays
- Standardization of permission cost including "dig & restore" or "dig & pay" procedures
- Prioritizes moving residential users from LPG to Piped Natural Gas (PNG) for better connectivity.
- Moves the country toward a gas-based economy to cut down on pollution from transport & industry segment primarily.



For this transition to be viable at scale, three parallel supply-side enablers are critical.

- **First**, the national high-pressure pipeline grid must be completed, especially the missing links connecting the gas-rich west coast to demand centres in the north and east.
- **Second**, LNG import infrastructure needs to be expanded and geographically diversified across both east & west coasts, supported by additional infrastructure.
- **Third**, a robust last-mile delivery ecosystem must be developed for off-grid regions, by using various virtual pipeline models (CNG/LNG trucking alongwith DCU), small-scale LNG hubs, and decentralized regasification to ensure access beyond the trunk pipeline network.
- **Fourth**, domestic gas production needs to be accelerated, particularly from ONGC's deepwater fields and new HELP-regime blocks.

On the demand side, it would be necessary to provide some targeted incentives. These include subsidies for PNG appliances and cookers, along with the need to balance and rationalise DBT incentives for PNG. It is not about getting rid of LPG but making sure that each and every home has a minimum of two options when it comes to using a different fuel for cooking.



C. Long Term: Building a More Resilient and Shock-Proof Ecosystem

Tapping India's Biogas Potential to Reduce Import Dependence

The least utilized lever for cutting down on the need to import LPG is within India itself, where there is a substantial amount of biomass and municipal waste produced annually, equating to around 60-70 MMT of biogas potential per annum in the form of LPG equivalent.

If realized, it can meaningfully offset current gas imports, which stands at roughly ~60% of overall consumption. The government's SATAT initiative has already laid the foundation by targeting 5,000 compressed biogas (CBG) plants, but progress remains the key question due to challenges around feedstock aggregation, financing, and offtake guarantee.

From an energy security perspective, biogas offers three distinct advantages.

- **First of all**, biogas is intrinsically domestic and distributed; hence, there would be lesser dependency on marine logistics and choke points.
- **Second**, the biogas can be used as a substitute for or blend with PNG in industrial and commercial purposes.
- **Third**, there would be a direct linkage made between agricultural residue and municipal waste through the creation of a circular economy using biogas.

The key to unlocking this is a shift from the goal-oriented approach to implementation-driven strategy. This includes creating assured aggregation schemes for biomass, long-term offtake arrangements, and viable pricing for CBG.

With proper implementation biogas can evolve from a niche sustainability option into a core pillar of India's energy security, easing gas import dependence while supporting rural incomes and waste management.

Focus on Reserves and Leverage existing National Infrastructure for Storage

India's long-term energy security vision requires a fundamental revisit of its reserve and storage philosophy. The current benchmarks are unambiguous:



The Parliamentary Standing Committee on Petroleum (March 2026) has called for India to reach 90 days of strategic reserves. The current crisis makes this not a recommendation but an imperative.

Further, Indian Railways which has vast network of railway consumer fuel depots (RCDs), marshalling yards, and tank wagon infrastructure is spread across the country. Post electrification of broad gauges most of these infrastructure remain underutilized. Hence, a dedicated railway tanker reserve programme, pre-stocked with LPG and fuel oil at inland depots, could provide a resilient inland buffer that is geographically distributed. This is not a novel concept, the US Strategic Petroleum Reserve distribution system uses pipeline and rail jointly, and India's rail density makes it well-suited to this role.

Building Infrastructure to Expand the East Coast Imperative

The logistical chain of India's LPG, and indeed all energy products, has developed on the basis of the Western coastline because being close to the Gulf sources helps reduce costs and shorten delivery time. However, such an efficient arrangement has made the system highly susceptible to various risks.

Hence, expanding the east coast is no longer just a balancing exercise, it is a resilience strategy. Ports like Visakhapatnam Port, Paradip Port, and Haldia Port already provide a credible base, but their LPG handling, storage, and hinterland connectivity remain underdeveloped relative to the west. Strengthening these nodes with larger import terminals, cavern-scale storage, and pipeline linkages to eastern and northern demand centres can materially reduce single-coast dependence.

Role of Long-Duration Energy Storage in Energy Security

Long-duration energy storage is a critical, but under-emphasized, pillar of energy security. Technologies like Pumped Storage Hydro (PSH) can turn intermittent renewable energy into reliable, round-the-clock (RTC) power.

PSH stores energy in the grid for long durations of time unlike short duration battery systems and is therefore more suitable for industrial loads and system balancing. Such storage solutions will be extremely critical to reduce reliance on imported fuels and ensure clean energy availability round the clock, in case of supply disruptions, as the penetration of renewables grows.



Closing the Loop: From LPG Crisis to Energy System Resilience

The LPG emergency isn't just a standalone occurrence, but rather the manifestation of an underlying structure India's energy system exhibits in different fuel streams, in terms of concentration risk on the supply side. The early reaction of the government to the disruption proved effective and directed. On the front of LPG supply, initiatives like prioritising, maximising and restraining demand stabilised necessary usage. At the same time, the acceleration of PNG transition via policy interventions and operational processes reflects the government's desire to mitigate reliance on one type of fuel for cooking needs.

However, the key takeaway from the whole situation lies much wider than just replacing one fuel with another. In order to create a robust energy system, India will need to build it based on portfolios of fuels. The first thing it will need to do is diversify its fuel stream, adding domestic gas, LNG, CBG, renewable energy systems, while also scaling firm and dispatchable renewable power enabled through long-duration energy storage and advanced coal technologies to its fuel basket and making sure not to put too much reliance on a certain supply chain or geography.

At the same time, the country's infrastructure will need to incorporate redundancy by ensuring multi-coast imports and diversified logistics and storage capacity.

In addition to that, it will be crucial for India to follow a specific approach to transitioning to a lower-carbon energy sector. This transition process will need to be gradual and well-calibrated. Moreover, any new transition step will need to decrease emissions and risks associated with the previous step at once. It appears especially relevant given the current situation, when fast movement into new fuel chains might end up generating additional vulnerabilities. Hence, avoiding "new dependencies" will be just as important.

The overall message remains simple, the process of energy transition in itself needs to take place with a focus on energy security. As a result, India's approach to energy transition must combine diversification, domestic capacity building, and strategic reserves, creating an energy system that gets cleaner as it gets more resilient. This includes not only diversifying fuel sources, but also building integrated energy systems where renewable generation, storage, and digital optimization work together to deliver reliable, round-the-clock power.



Conclusion

The LPG dilemma facing India today is essentially the result of a success story that has run ahead of the ability of the supporting systems. The swift proliferation of LPG across 300 million+ households in India is a remarkable feat. However, it also means there is a high concentration of demand with little buffer to absorb shocks, due to its dependency on external supply chains.

Recent efforts to resolve the crisis through LPG Control Order, the implementation of “Operation Sankalp”, and diplomatic pressure will certainly aid in bringing stability. Yet, the basic realities still remain unaltered. India is heavily import-dependent and reliant on oil supplies from the Strait of Hormuz. It also has little storage, and other sources cannot easily be integrated due to blending constraints and logistics issues. Its key facilities are located in a limited number of locations geographically.

What needs to be done, therefore, is not incremental measures, but a fundamental correction to address India’s structural weakness. Diversification of sources beyond conventional partners, increased storage both inland and distributed, additional capacity on the eastern coast, and increased reliance on PNG in cities with biogas in urban centers form parts of the same solution set.

Over the long term, reducing vulnerability will depend not just on securing alternative fuel supplies, but on building domestic, storage-backed renewable systems capable of delivering firm power at scale.



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