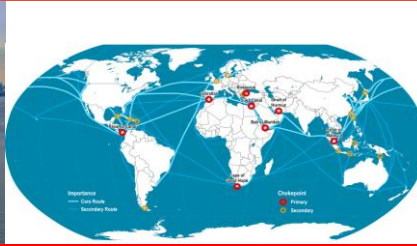


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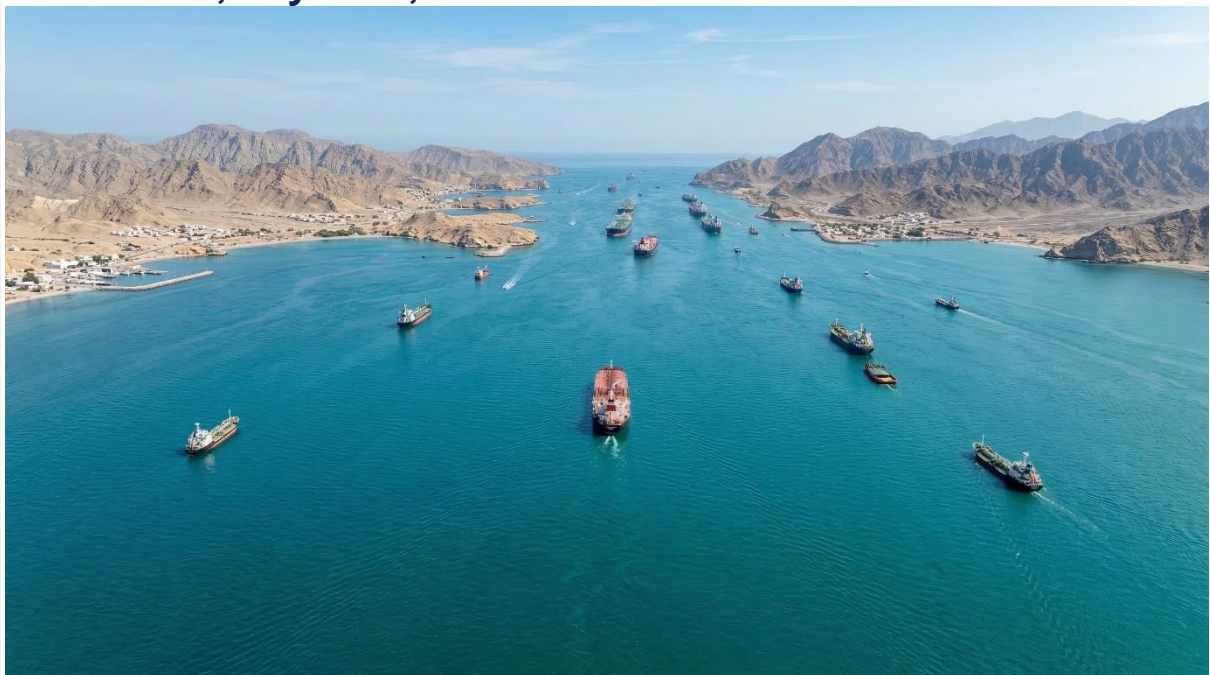
Date: 11th April 26

Mumbai-India

International Maritime Trade & Transport



A Hormuz toll would create a potential principle that could be abused, says UK, EU slams toll idea



EU on Thursday rejected Iran's push to impose tolls on ships maritime law.

A full reopening of the vital waterway remains a key point of contention as talks are due to start after Iran and the United States announced **transiting the Strait of Hormuz as this would risk undermining international** a two-week ceasefire following over a month of hostilities.

Now, the United States and Israel are presenting the reopening of the Strait of Hormuz, which functioned normally before the war, as a victory. Iran is even trying to capitalize on the new situation, or at least use it to recoup its losses.

"Blocking the strait, or the hypothetical collection of a toll to allow ships to pass, has no legal basis," warn legal experts. European Commission spokesperson Anouar El Anouni told a press conference on Thursday that the international law is very clear as well as the law of the sea.

Asked whether companies should agree to pay or remain stranded in the Persian Gulf while waiting for a solution or attempt to pass through Hormuz and pay Iran \$1 per oil barrel, EC spokesman was clear in his answer: "International law provides for the freedom of navigation, which means ... basically no payment or toll whatsoever."

"Freedom of navigation is a public good ... which means that the navigation must be free and needs to be ensured," he said. "Freedom of navigation must be ensured at all times, and this is crystal clear."

Persian Gulf, the Commission said the decision should be made by private operators themselves, taking into account their "various interests." The Commission repeated, once again, that in accordance with the international law there would not be such tolls or fees to be paid.

"We are calling for the respect of international law, and if you look at international law there would not be such tolls or fee and this is indeed a decision that would be taken by the fees to be paid," European Commission chief spokesperson Paula Pinho told reporters. "It is up to the concerned companies and shipowners to see whether, despite this, they would still want to pay this companies themselves where they may be also weighing the various interests."

U.S. President Donald Trump on Monday suggested the United States could charge tolls for passage through the Strait of Hormuz. Speaking with reporters, Trump was asked about Iran possibly charging tolls for ships to pass through the waterway.

"What about us charging tolls?" he asked in response. "I'd rather do that than let them have them, right?" he added.

UK defence secretary John Healey, speaking at a press conference in Downing Street on Thursday, said: "We want to see the Strait of Hormuz remains open and free, consistent with the long-established laws of international navigation and without any sort of tolls for passage."

The defence secretary said that Gulf countries agree with the U.K. on the dangers of introducing tolls as it "would create a potential principle that could be used and abused by others elsewhere."

The US has repeatedly accused allies of not doing enough to secure the shipping route or to support its war effort, leaving the UK and other nations weighing how to contribute to securing the critical waterway without becoming involved in the wider war.

In a Truth Social post published on Thursday, Trump began by announcing that all U.S. service members currently in the Middle East will remain there until a "real agreement" with Iran is reached.

"All U.S. ships, aircraft, and military personnel, with additional ammunition, weaponry, and anything else that is appropriate and necessary for the lethal prosecution and destruction of an already substantially degraded enemy, will remain in place in, and around, Iran, until such time as the real agreement reached is fully complied with," he wrote on Truth Social.

The president then warned that if no deal is reached, "then the 'shootin' starts," threatening strikes would be "bigger, and better, and stronger than anyone has ever seen before."

He continued, "It was agreed, a long time ago, and despite all of the fake rhetoric to the contrary – no nuclear weapons and, the Strait of Hormuz will be open and safe," before adding, "In the meantime our great military is loading up and resting, looking forward, actually, to its next conquest."

Trump warns Iran against imposing tolls

In a barrage of social media posts that sparked fresh fears for the shaky **Keir Starmer spoke to Trump from Qatar**

UK's prime minister Keir Starmer spoke to President Trump from Qatar on Thursday evening. Downing Street said the prime minister set out his discussions with Gulf leaders and military planners in the region on the need to restore freedom of navigation in the Strait of Hormuz, as well as the UK's efforts to convene partners to agree a viable plan.

They agreed that now there is a ceasefire in place and agreement to open the Strait. The leaders discussed the need for a practical plan to get shipping moving again as quickly as possible. Trump also warned Iran against imposing a toll for ships passing through the crucial waterway. (Source:

Australia Bans Bulk Carrier After 7 Months of Unpaid Crew Wages



Australia's maritime regulator has issued a stark warning to According to AMSA, inspectors identified multiple deficiencies during the boarding, including the underpayment shipowners after banning a Liberia-flagged bulk carrier for six months over serious breaches of seafarer welfare standards.

The Australian Maritime Safety Authority (AMSA) announced it has prohibited the vessel *BBG Wuzhou* from entering Australian ports or waters until October 4, 2026, following a port state control inspection in Newcastle that uncovered widespread violations of the Maritime Labour Convention (MLC).

of wages, inadequate food provisions, and a failure to provide free drinking water to crew members—conditions that led authorities to detain the vessel as unseaworthy and substandard.

The most serious finding: crew members had gone unpaid for nearly seven months, with outstanding wages totaling AUD \$68,994.15.

"Seafarers play a critical role in keeping Australia moving, and they deserve to be paid lawfully and fairly," said AMSA Acting Executive Director of Operations Greg Witherall. "Underpaying seafarers is exploitation—plain and simple."

AMSA said the enforcement action underscores Australia's "zero tolerance" approach to breaches of the MLC, which mandates minimum standards for working and living conditions at sea, including timely wage payments, safe accommodation, adequate rest, and access to basic necessities.

Failure to comply with these obligations can carry steep consequences. Vessel bans—such as the one imposed on *BBG Wuzhou*—can cost operators millions in lost revenue and disrupted trade, particularly in a market where port access is critical to maintaining charter commitments. (Source: gCaptain)

At Near Standstill as Iran Warns Ships to Keep to Its Waters



LONDON, April 9 (Reuters) – Iran's Islamic Revolutionary Guard Corps (IRGC) warned ships to keep to a route passing through its territorial waters when crossing the Gulf's Strait of Hormuz as traffic on Thursday remained well below 10% of normal volumes.

Mitsui O.S.K. Lines 9104.T, one of Japan's big three shipping firms, is among those caught up in the confusion as firms try to work out what impact the U.S.-Iran two-week ceasefire is having.

The IRGC wants vessels to sail through Iranian waters around Larak Island in order to avoid the risk of naval mines in the usual lanes through the strait, Iran's semi-official Tasnim news agency reported on Thursday.

Vessels are to enter the strait north of Larak Island and exit just south of it until further notice in coordination with the IRGC's navy, Tasnim quoted the IRGC as saying.

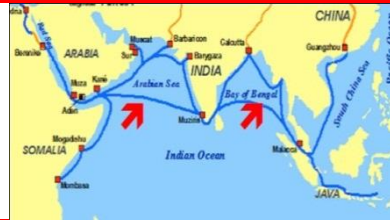
"There is to be a realistic possibility of continued risk to unauthorized Strait of Hormuz transits as well as to Israel- and US- affiliated shipping attempting to transit," British maritime security company Ambrey said in an advisory. "Even shipping with apparent approval has been turned back in recent weeks mid-transit," it said.

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India allows sanctioned VLCC to dock with Iranian oil amid energy crisis



India has permitted a sanctioned tanker to dock with an Iranian crude cargo in a bid to keep energy imports flowing.

With the Strait of Hormuz still largely closed, the government has also granted a waiver to an elderly LPG carrier to bring in gas, two officials told Reuters.

The country is facing its worst gas crisis for decades and has introduced rationing of LPG used for cooking.

US pressure group United Against Nuclear Iran (UANI) has tallied at least 23 Iranian-flagged tankers reaching Asia since the war began on 28 little changed from pre-conflict levels.

The US has granted a 30-day waiver for Iranian imports that is due to expire on 19 April.

A source told Reuters that an LPG ship built nearly 30 years ago was permitted to enter Mangalore.

And the 300,000-dwt tanker VLCC Jaya (built 2008), of unknown ownership, was also allowed to unload. The ship has been sanctioned by the US for Iranian trading.

The Indian officials said approvals are being made on a case-by-case basis. Only vessels meeting safety conditions are being considered.

India requires ships of more than 20 years to have a seaworthiness certificate from a mainstream class society.

The Ministry of Ports, Shipping and Waterways and the Ministry of Petroleum and Natural Gas has not commented (Source: Trade Wind

Indian Port Sector



DG Shipping Tells Ports To Pass On Benefits Upfront To War-Affected Exporters



New Delhi, Apr 10 (KNN) The Directorate General of Shipping (DG Shipping) has directed ports and terminal operators to immediately pass on concessions to exporters affected by stranded Gulf-bound cargo, and discontinue reimbursement-based mechanisms that delay relief.

In a circular dated April 8, the regulator noted that concessions such as detention charges, ground rent and reefer plug-in costs were not being uniformly transferred to exporters, despite being approved by port authorities.

Direct transfer of benefits mandated

DG Shipping observed that terminal operators typically charge Non-Vessel Operating Common Carriers (NVOCCs) upfront and later reimburse them, resulting in delays in passing benefits to exporters, reported The Economic Times.

Terming this a 'circuitous process,' the regulator has now mandated that all concessions approved by port authorities must be passed on directly and transparently to stakeholders, including freight forwarders and NVOCCs, who must in turn reflect these benefits to exporters.

Reimbursement or post-facto claim mechanisms have been discontinued with immediate effect. Port authorities have been tasked with monitoring compliance to ensure timely transfer of benefits.



Scrutiny of additional charges

The regulator also flagged instances where shipping lines imposed additional charges for cargo diversion or discharge at alternate ports, including for Back-to-Town (BTT) consignments, without adequate documentation.

It has directed that all such charges must be formally recorded, time-stamped, and clearly quantified. The move is aimed at enabling exporters to claim support under the government's Rs 497 crore Resilience & Logistics Intervention for Export Facilitation (RELIEF) scheme. Shipping lines have been instructed to maintain full transparency and auditability in such cases.

War-risk premium under review

DG Shipping also raised concerns over revisions in the war-risk premium (WRP) levied on cargo, stating that such changes may not align with earlier directions. The matter is being taken up with insurance providers, including Protection and Indemnity (P&I) Clubs, in coordination with GIC Re.

Shipping lines have been directed to proportionately reflect any revision in WRP in freight charges. Any deviation or non-alignment between actual risk premiums and freight components will be subject to review and action.

The circular reiterated that provisions under the Merchant Shipping Act, 2025 empower the government to ensure transparency in shipping-related charges, including requiring clear disclosure of all costs in documents such as the Bill of Lading. *(Source: KNN Bureau)*

An advertisement for two trade events. On the left, "INTERMODAL ASIA 2026" is written in large, bold letters, with the dates "22-24 April, Shanghai" below. On the right, "TOC EUROPE" is written in large, bold letters, with the dates "19 - 21 May 2026" and location "Hamburg Messe, Germany" below. The text "The AGM for Port and Cargo Supply Chain Professionals" is also present, along with a "Register now!" button. The background of the right side shows a woman in a white shirt and glasses talking to a man in a dark suit.

India's Foreign Trade

West Asia Crisis Threatens 13% Of India's Goods Exports: Crisil



Emphasising that a prolonged West Asia conflict could cause sharper disruption, Crisil has stated that the geopolitical instability has threatened the country's 13 per cent of goods exports and 38 per cent of remittance inflows.

The report noted that the region accounts for 40 to 50 per cent of India's oil imports, 13 per cent of goods exports and 8 per cent of foreign direct investment (FDI) inflows. In fiscal 2025, India imported goods worth USD 122 billion from the Gulf Cooperation Council (GCC) region and West Asia, the report highlighted.

Exports to West Asia have been impacted by logistical challenges and supply-chain realignments due to the conflict. In fiscal 2025, India exported goods worth USD 57 billion to GCC countries (13 per cent of India's total goods exports) and USD 9 billion (2 per cent) to other West Asian countries. The report explained that the region accounts for over 70 per cent of Basmati rice exports, 30 per cent of boneless bovine meat, 25 per cent of ceramic products, 15 per cent of petroleum products and 20 per cent of gems and jewellery.

West Asia accounted for 40 to 42 per cent of India's fertiliser imports in the fiscal years 2025 and 2026. The highest dependence is on urea, with 64.8 per cent of its shipments coming from West Asia in fiscal 2025. The region also accounts for over a third of diammonium phosphate (DAP) imports.

Crisil noted that after an initial spike, Brent is likely to average USD 100 per bbl in this fiscal, while the Strait of Hormuz remains partially operational for select countries, including India. Pricing power, too, is expected to get restricted amid rising inflation. As a result, the downside risk to growth is expected to increase, slowing GDP to 6.5 per cent for this fiscal, it said. Elevated input costs across crude oil, gas and their derived inputs, along with secondary effects on transportation and raw material prices such as packaging, will impact major production sectors.

While manufacturers may switch to alternative fuels wherever feasible and diversify natural gas sourcing, the costs will remain high. Sectors heavily reliant on liquefied petroleum gas (LPG), with limited fuel flexibility, may face prolonged constraints.

The agriculture sector also faces risks. With limited fertiliser inventories being allocated to the kharif crop, additional procurement due to higher prices and therefore its availability for rabi could be strained, affecting food output. On the domestic front, consumption, which is the strongest driver of growth at present, could soften due to slower agricultural income growth and rising retail inflation.

The report pointed out that consumer price inflation is seen averaging 5.4 per cent in this fiscal, driven by higher fuel costs and second-round effects on core inflation. This will likely prompt tighter monetary policy, it noted.

Implications For India's CAD

GCC countries accounted for 38 per cent of remittances to India in fiscal 2024, with more than 9.3 million Indians employed in the region. The report explained that a hit to their incomes can have implications for India's current account deficit at a time when the trade deficit is already under pressure.

A greater upside to the CAD due to weaker exports, rise in the import bill (particularly due to oil, gas and fertiliser imports) and softer remittance inflow (at least until rebuilding commences in West Asia) takes the CAD ratio to 2.5 per cent of GDP. Persistent global uncertainties and tighter global monetary policies could further pressure the currency. Crisil stated that it expects the rupee to average around 93 by March 2027, assuming the RBI employs tools to check currency volatility. (Source:Business World-India)

Imports surge 22% due to higher gold imports, exports dip because of shipping disruptions:

Mumbai April 8 (ANI): Reserve Bank of India (RBI) Governor Sanjay Malhotra on Wednesday said India's merchandise exports contracted by 0.2 per cent in the first two months of the year, while imports recorded a sharp growth of more than 22 per cent, largely driven by higher gold imports, resulting in a widening trade deficit.

He stated, "India's merchandise exports contracted by 0.2 per cent during the first two months of this year on a year-on-year basis. This was a result of export contraction in key markets. Merchandise imports, on the other hand, recorded a double-digit growth of more than 22 per cent. This was largely driven by higher gold imports".

The central bank also said that global trade is expected to slow in 2026 compared to 2025, driven by lingering tariff-related uncertainties, the ongoing West Asia conflict, and elevated energy prices.

Compiled by Dr.Sham Choughule through various sources for private circulation



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