

INDIA MARITIME FACTSHEET

Opportunities for Norwegian Exporters under the Trade and Economic Partnership Agreement (TEPA)



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Norwegian Embassy
New Delhi



Nordic Council
of Ministers

What is the TEPA?

The India–EFTA TEPA — between India and Norway, Iceland, Switzerland and Liechtenstein — entered into force on 1 October 2025, and covers services, investment, mobility, and regulatory transparency.¹

Tariff liberalisation

- The EFTA removes duties on 92.2% of India's tariff lines, while India phases out tariffs on 82.7% of EFTA tariff lines over the transition period.²
- For Norway, duty-free access applies to 42% of current tariff lines immediately, rising to 92% within a decade.³

Trade positioning

- Norway–India trade stood at ~USD 410 million in 2025, accounting for ~0.24% of Norway's global exports.⁴
- Exports to India were led primarily by metals, industrial machinery and electronic equipment.⁵

Indian maritime landscape

India's maritime sector is being transformed under Maritime India Vision 2030 and Maritime Amrit Kaal Vision 2047, pivoting from a port-and-vessel operator to a global maritime powerhouse.

- Port infrastructure and cargo handling constitute the core of India's maritime activity.
- India's shipbuilding industry is growing from a low base, but commercial shipbuilding remains nascent.

India imports most of maritime equipment and components and has a near-total reliance on foreign vessels for transport of goods.

- ~90% to 95% of India's goods is carried by foreign vessels.⁹
- Equipment import dependency on propulsion engines, propellers & blades, navigation equipment, structural ship parts, and others.



India relies on maritime sector for 95% trade by volume.⁶

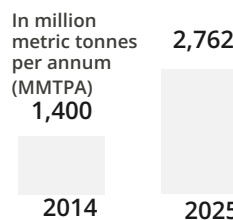


13 major ports; 217 non-major ports, and ~11,098 km coastline.⁷

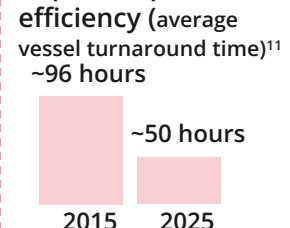


915+ MT cargo handled by major ports in FY 2025–26.⁸

2X port capacity:¹⁰



Improved port efficiency (average vessel turnaround time)¹¹



Average Turnaround Time (TAT) in ship handling represents the total time a vessel spends in port—from its initial arrival at the port limits to its departure upon completing all cargo operations.

1. Ministry of Commerce and Industry, Government of India

2. Ministry of Commerce and Industry, Government of India

3. T&A analysis based on TEPA Schedule

4. Data extracted from ITC Trade Map

5. EFTA Statistics

6, 10. Press Information Bureau, 'Maritime India: From Vision 2030 to Amrit Kaal 2047', October 2025

7, 11. Ministry of Port Shipping and Waterway, Government of India

8. Press Information Bureau, 'Major Ports Record 915 Million Tonnes Cargo in FY 2025–26, Surpass Target with 7.06% Growth', April 2026

9. Economic Times, 'India's reliance on foreign ships, a strategic risk', March 2026

Norway's maritime landscape

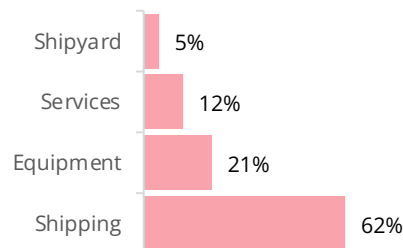
150 years of refinement

Norway has spent over a century and a half building maritime capability — and is the global frontrunner in the transition to zero-emission shipping.

Core strengths

Battery systems, ammonia-fuelled vessels & bunkering, retrofitting, autonomous navigation, digital-twin frameworks, high-performance marine equipment.

Four segments of Norway's maritime exports



Source: Maritime Outlook Report, 2026



Norway's presence in India

- Naval systems: Kongsberg's is under contract to supply Electric RAS — permanent-magnet azimuth thrusters, energy storage, and automation — for Indian Navy Fleet Support Ships.
- Digital platforms: Kongsberg Vessel Insight, Grieg Connect PMIS, Vard SeaQ Green Pilot, and Wilhelmsen WCrew/Wlearn tools deployed across shipyards, fleets and ports.
- Classification leader: DNV is the leading classification society in India working. It has signed a decarbonisation focused MoU with Mumbai Port.
- Propulsion supplier of choice: Norway leads India's propeller and blade imports; Kongsberg K-Chief, AutoChief, K-Pos and integrated navigation are in active use at Indian shipyards and the Indian Navy.
- Shipbuilding partnership: Swan Defence & Heavy Industries (Pipavav) signed a USD 227 million contract with Norway's Rederiet Stenersen for six 18,000 DWT IMO Type II chemical tankers.

India's challenge-a complexity gap

India excels in low-to-medium-complexity shipbuilding and supplies 12% of the world's seafarer¹² — but remains dependent on international expertise for high-tech maritime operations.



Fleet modernisation & green propulsion: Based on 2023 data of Ministry of Ports, Shipping and Waterways, ~45% of the merchant fleet is over 20 years of age.¹³ There is an immediate need for energy-efficient retrofitting, hybrid propulsion, and vessels running on green hydrogen, ammonia and methanol.



Integrated port digitalisation: Many ports still operate as "digital islands". Unified, AI-driven predictive systems and Digital Twins are needed to move from reactive to synchronised, predictive logistics.



Specialised vessel engineering: Domestic share is less than 2% of the global market.¹⁴ Polar research vessels, deep-sea mining platforms and advanced OSVs require foreign design and system integration.

12. Ministry of Ports, Shipping and Waterways

13. Ministry of Ports, Shipping and Waterways

14. Forging New Horizons, Crisil and S&P Global, January 2025

The strategic fit

The TEPA aligns with India's goals in shipbuilding and decarbonisation, creating demand for Norwegian strengths that correspond directly to India's capability gaps. The relationship was reinforced at Nor-Shipping 2025 with a targeted focus on green technologies, ship recycling, and seafarer training.

India's structural need	Norwegian strengths
Aging fleet and green propulsion	Battery systems, ammonia/methanol-ready vessels, hybrid retrofitting, alternative-fuel bunkering expertise
"Digital island" ports	Digital-twin technology, AI-driven port management, predictive berth allocation, vessel traffic management
High-complexity vessel design	BWTS retrofits, sustainable ship dismantling, in-country MRO footprint and certification services
Decarbonisation compliance	CII roadmaps, port decarbonisation planning, ESG reporting, low-carbon fuel feasibility
Classification & assurance	Newbuild classification, cybersecurity assessment, carbon-intensity auditing

Norwegian maritime exports are predominantly services-led. India's needs and ambitions are therefore best read as a services opportunity landscape.

The TEPA facilitated the delivery of services primarily through local presence (Mode 3) and temporary expert deployment (Mode 4), with cross-border digital delivery (Mode 1) where the TEPA permits it.



Service categories with export potential

The TEPA grants Norwegian providers legally binding market access and national-treatment rights. It provides Norwegian companies with a more predictable environment for delivering comprehensive services to Indian shipyards, shipping companies and port authorities. It removes separate import-clearance, visa barriers for technical engineers, and service-taxation uncertainty.

- Engineering, R&D, technical testing and consulting are the most open lanes — Norwegian firms can deliver these to India immediately without needing any local setup.
- Cargo handling, warehousing, MRO and freight forwarding require Indian presence (Mode 3); however, the TEPA guarantees equal treatment once established.

Norwegian strengths	The TEPA provision and advantage
Scientific and technical consulting	• ESG advisory, vessel optimisation, design, consulting — fully open for cross-border delivery under Mode 1.
Engineering services (CPC 8672, 8673, 8676, 86103)	• This is an open segment, allowing remote, local, and hybrid delivery models.
Marine cargo handling, Port storage and warehousing, Container station & depot, Freight forwarding, Vessel MRO and repair	• Norwegian firms can establish operations in India under Mode 3. • Equal treatment ensured for local entity
Maritime agency services, and equipment maintenance (CPC 633)	• Remote documentation, scheduling & coordination, diagnostics and monitoring allowed under Mode 1. • Full-scale service operations can be established under Mode 3 with equal treatment after local establishment.
Personnel movement under Mode 4	• Norwegian engineers, ship inspectors and offshore technicians can enter India for project work subject to Indian visa, labour and licensing rules. • Business visitors up to 180 days. • Intra-corporate transferees up to 5 years.
Crew and maritime personnel exchange	• The TEPA improves operational mobility of seafarers, ensuring smoother crew changes, transit, and recognition of identity document.
Key restrictions: • Chartering & vessel leasing — Foreign vessel chartering requires Directorate General of Shipping (DG) approval if Indian vessels are unavailable. • Cabotage — India's domestic coastal shipping remains fully reserved for Indian operators.	

Product categories with export potential

The TEPA facilitates reduced tariffs, market access commitments, and provisions for bundled goods-plus-services delivery into India, aligning with India's goals in shipbuilding and decarbonisation.

This will translate to creating demand for Norway's strengths in areas such as propulsion systems, green shipping technology, maritime digital solutions, and offshore services, which correspond to capability gaps in India.

The TEPA advantage

Immediate wins (Day-1 zero duty)

- Gears (848340), hand pumps & oil/petrol filters (841320, 842123), catalytic converters (842132), polyester/synthetic paints (320810, 320990), and stainless seamless casing/tubing for oil & gas drilling (730424, 730459, 730690).
- **Implication:** Norwegian suppliers of high-volume consumables and offshore drilling inputs gain instant cost competitiveness

Already bound at 0% (locked-in certainty)

- Optical fibre cables, cruise ships and cargo/passenger vessels, lifeboats, and key marine measurement/navigational instruments (902610-90, 902680, 901420-903290).
- **Implication:** Provides predictability for high-ticket vessel and instrumentation exports — Norway's services-led Marinetechnology players such as Kongsberg, DNV-linked OEMs benefit from regulatory stability rather than headline duty cuts.

5-year track (fast liberalisation)

- Covers turbopropellers, gas turbines, piston/diesel engines, range hoods, electric-motor fans, transformers, generators, acrylic paints, line pipes/structural steel, winches/hoists, and marine navigation instruments.
- Base duties of 8.25%–22% collapse to 0% within five years — the most commercially material bucket for Norwegian propulsion and offshore steel exporters.

7-year track

- Centrifugal pumps, switchboards/control cabinets, acrylic-vinyl paints, overhead/gantry cranes.
- Mid-tier capital equipment with a measured glide-path.

10-year track (heavy equipment)

Turbojets, large diesel engines, fuel/lubricating pumps, industrial fans, refrigeration compressors, generating sets, high-capacity transformers, vehicle/ship lighting, seamless stainless tubing, mobile cranes.

Partial reductions (not full elimination)

Compression-ignition outboard engines (840810) and ballasts for discharge lamps (850410): only ~50% cut over 5 years, with residual duty held thereafter.

Key considerations:

- Near-term opportunity in offshore drilling inputs, marine paints, pumps/filters, and bound-at-0% vessels and instruments.
- Patience required for heavy propulsion, generating sets, and stainless tubing — where India's structural import dependence is the highest, but tariff relief is back-loaded.

Six prime opportunity areas



Port digitisation: Digital twins, AI port management, predictive berth allocation, emissions tracking — embedded at design stage — in greenfield ports and India's shift from reactive to predictive operations across 12 major ports and 30 PPP projects.



Integrated vessel management: End-to-end digital twin, predictive maintenance, energy management and emissions reporting, replacing current fragmented stack at HSL, GRSE, GSL.



Shift, repair, retrofit, & MRO: Sustainable ship dismantling, BWTS installation, hybrid power conversion, regulatory consulting, and in-country MRO.



Crew management and training: Integrated crew platforms + maritime training covering ISM/ISPS, CII, hybrid-propulsion and cybersecurity, for replacing non-integrated systems currently in use.



Green and decarbonisation advisory: Port decarbonisation planning, low-carbon fuel feasibility, shore-power and ESG reporting — deliverable Remotely—to support India's carbon neutral port strategy.



Classification, assurance, and ESG: Full compliance stack — newbuild classification, carbon-intensity auditing, cybersecurity, and regulatory advisory.



Market entry routes

- India is a long gestation market hence patience and perseverance is required.
- Innovation Norway has offices in New Delhi, has network within Indian maritime sector, legal advisors, and compliance consultants.
- **Partner with a local maritime/commercial agent** to monitor opportunities and manage registrations across India's key procurement and trade platforms, including GeM, CPPP/eProcurement System of India, Indian Ports Association/major port tender portals, DGFT, ICEGATE/SWIFT, and Port Community System (PCS).
- **Use these platforms to identify and build supply relationships with shipyards, port authorities, and terminal operators** for ship systems, digital platforms, classification advisory, decarbonization and infrastructure services, retrofit, MRO, crew management, and emission-compliance systems.
- **Map PPP tender calendars** for supplying structured integrated packages and establishing commercial presence to bid on concession-scale contracts. Procurement at major ports and shipyards follows annual cycles with defined tender windows.
- **Service hub concentration in Mumbai/Navi Mumbai, Kochi, Gujarat, Chennai, and Visakhapatnam.** Norwegian maritime service firms can build after-sales and field engineering capacity in these four clusters.
- **Bundle installation, commissioning and crew training.**
- **Engage Indian component manufacturers as co-production partners** — making Norwegian technology viable.
- **Indian shipowners require handholding in capacity building, implementing ballast water treatment, IMO DCS reporting, and CII compliance.** Norwegian service providers may have to factor client education and compliance transition support as a component of engagement, not a separate line item.

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