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A new playing field in the Indian Ocean

What the EU-India Free Trade Agreement means for the German maritime sector

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Content

1. Political settlement after 20 years of negotiations

After almost 20 years of negotiations, the European Union and India concluded their bilateral Free Trade Agreement (FTA) at political level in January 2026 (Figure 1). The agreement still requires formal ratification by both sides; however, a basic agreement has been reached and sets out the framework for a deeper trade and economic partnership.[1]

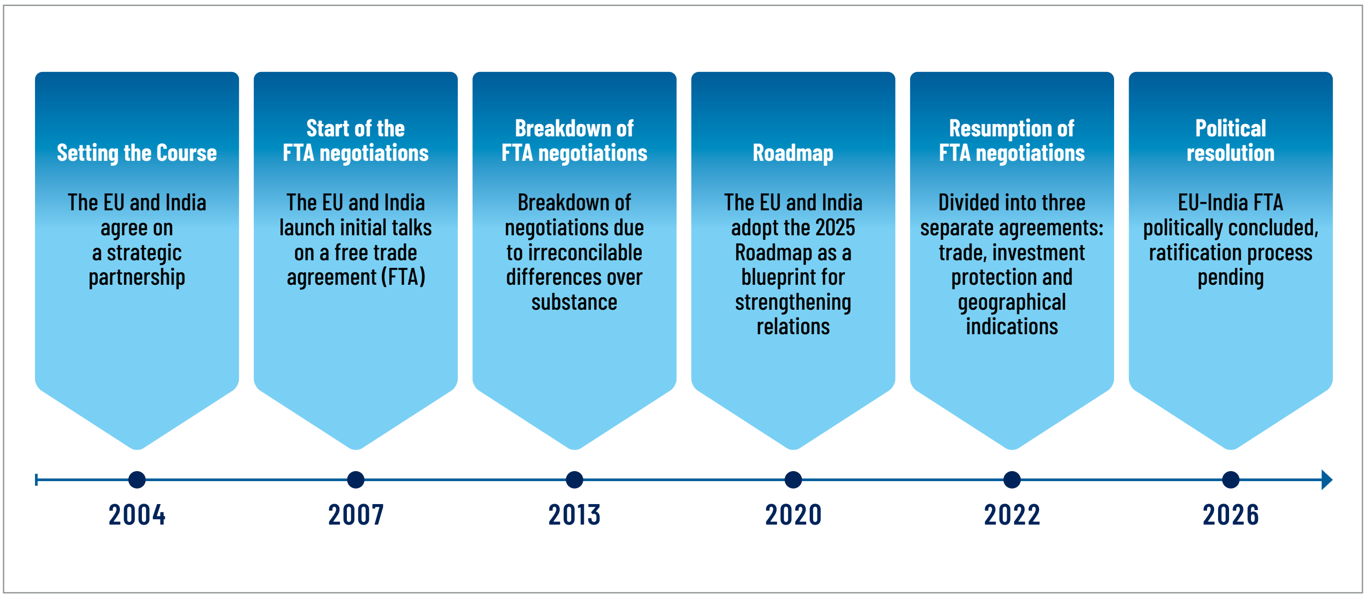

Figure 1.: Trade Relations between the EU and India

Source: Hilpert et al. 2023 ©German Maritime Centre e.V.

With a population of around 1.5 billion, a rapidly growing middle class and the ambitious Sagarmala port modernisation programme[2], India is emerging as one of the most significant maritime growth markets of the coming decades.

2. India's maritime sector in figures

India, including its archipelagos, has a total coastline of 11,098 km. The maritime infrastructure is of strategic importance to the Indian economy, as around 95% of the total volume of trade and 68% of the value of trade is conducted by sea, underscoring the central role of the maritime sector in the country's import and export activities.[3]

2.1 Shipbuilding

India has 114 shipyards (as of 2025)[4], including large public-sector shipyards with capacities of up to 660,000 dwt[5], as well as specialised private shipyards. With its ambitious Maritime India Vision 2030, India aims to rise to become one of the world's top 10 shipbuilding nations (and among the top 5 by 2047) through the systematic development of shipbuilding capacity and competitiveness, and to realise the motto "Make in India, Make for the World". To achieve this goal, strategic locations have been identified: Tamil Nadu was selected for the development of a comprehensive maritime cluster under the Sagarmala National Perspective Plan due to its proximity to the main shipping routes

1 See European Commission 2026.
2 See Government of India/Ministry of Ports, Shipping and Waterways 2026.
3 See Government of India/Ministry of Ports, Shipping and Waterways 2026, P. 4.
4 See Clarksons 2026 (As of April 2026).
5 Dwt (Deadweight Tonnage) refers to a ship's carrying capacity in tonnes. It indicates the maximum weight a ship can carry, including cargo, fuel, fresh water, provisions and crew.

between Asia and Europe, the presence of the steel industry, and existing shipyards and ports. In parallel, the Gujarat Maritime Board is developing a Marine Shipbuilding Park in Bhavnagar, a Maritime Services Cluster in Ahmedabad and the Gujarat International Finance Tec-City to create synergies between shipbuilding, the supply industry and maritime services. The government supports shipbuilding through special incentive schemes such as the Shipbuilding Financial Assistance Scheme, with a total budget of approximately €2.3 billion until 2036 [6] and the Shipbuilding Development Scheme, with approximately €1.9 billion, also until 2036.[7]

Alongside Pakistan and Bangladesh, India is one of the world's leading centres for ship recycling. The stretch of coastline at Alang in the state of Gujarat is one of the world's largest shipbreaking yards and exemplifies the transformation the industry is undergoing: the beaching process – the stranding of ships on the beach – continues to pose significant risks to workers and coastal ecosystems, including oil residues, heavy metals and hazardous working conditions. [8] However, even before the Hong Kong Convention comes into force in June 2025, numerous shipyards in Alang have voluntarily invested in modern infrastructure, staff training and improved environmental and labour standards. The German Shipowners' Association (VDR) expressly acknowledges this development – and regards it as a step forward that deserves active support. [9]

2.2 Shipping

According to the Ministry of Ports, Shipping and Waterways, there are currently around 308,000 qualified Indian seafarers employed, making India one of the world's leading suppliers of maritime personnel. The number of female seafarers has increased tenfold since 2014.[10] India operates numerous maritime training institutions for the training and qualification of seafarers, including the Indian Maritime University[11] and a number of training institutes certified by the Directorate General of Shipping, which offer comprehensive programmes for prospective seafarers and collaborate with industrial training institutes.[12] The Indian-flagged merchant fleet currently comprises 1,881 active vessels.[13] According to the Indian government, the fleet is operated by leading shipping companies, such as the state-owned Shipping Corporation of India, which has a fleet of 58 vessels with a total tonnage of approximately 2.93 million GT[14] (as of December 2025).[15]

2.3 Inland waterway transport and waterways

Established in 1986, the Inland Waterways Authority of India manages a growing network of 111 designated inland waterways with a combined total length of 20,375 km, spanning various river systems, canals and coastal waters (Figure 2). Of these, 32 waterways are currently operational (as of December 2025), with the most important ones being continuously expanded and modernised to provide a cost-effective and environmentally friendly alternative to road and rail transport for bulk goods. Freight transport via inland waterways is showing continuous growth: it rose from just 18.07 million tonnes in the 2013/14 financial year to around 146 million tonnes in the 2024/25 financial year. In the current financial year, approximately 160.8 million tonnes of freight had already been

6 Figures are rounded. Exchange rate: 1 euro = approx. 107 Indian rupees (INR) (as of March 2026).
7 See Government of India/Ministry of Ports, Shipping and Waterways 2026, PP. 56-60.
8 See Spohr 2016.
9 See Verband Deutscher Reeder e. V. 2026.
10 See Government of India/Ministry of Ports, Shipping and Waterways 2026, P. 65.
11 Ibid., P. 100.
12 Ibid., P. 82.
13 See Clarksons 2026 (As of: April 2026).
14 Gross tonnage (GT) is a dimensionless value that indicates the total volume of all enclosed spaces on a ship. It serves as a measure of the ship's size, not its weight, and is used to calculate port charges and taxes.
15 See Government of India/Ministry of Ports, Shipping and Waterways 2026, P. 92.

transported by December 2025. This development is supported by extensive infrastructure projects, including the expansion of terminals, navigation aids and the deepening of navigation channels.[16]

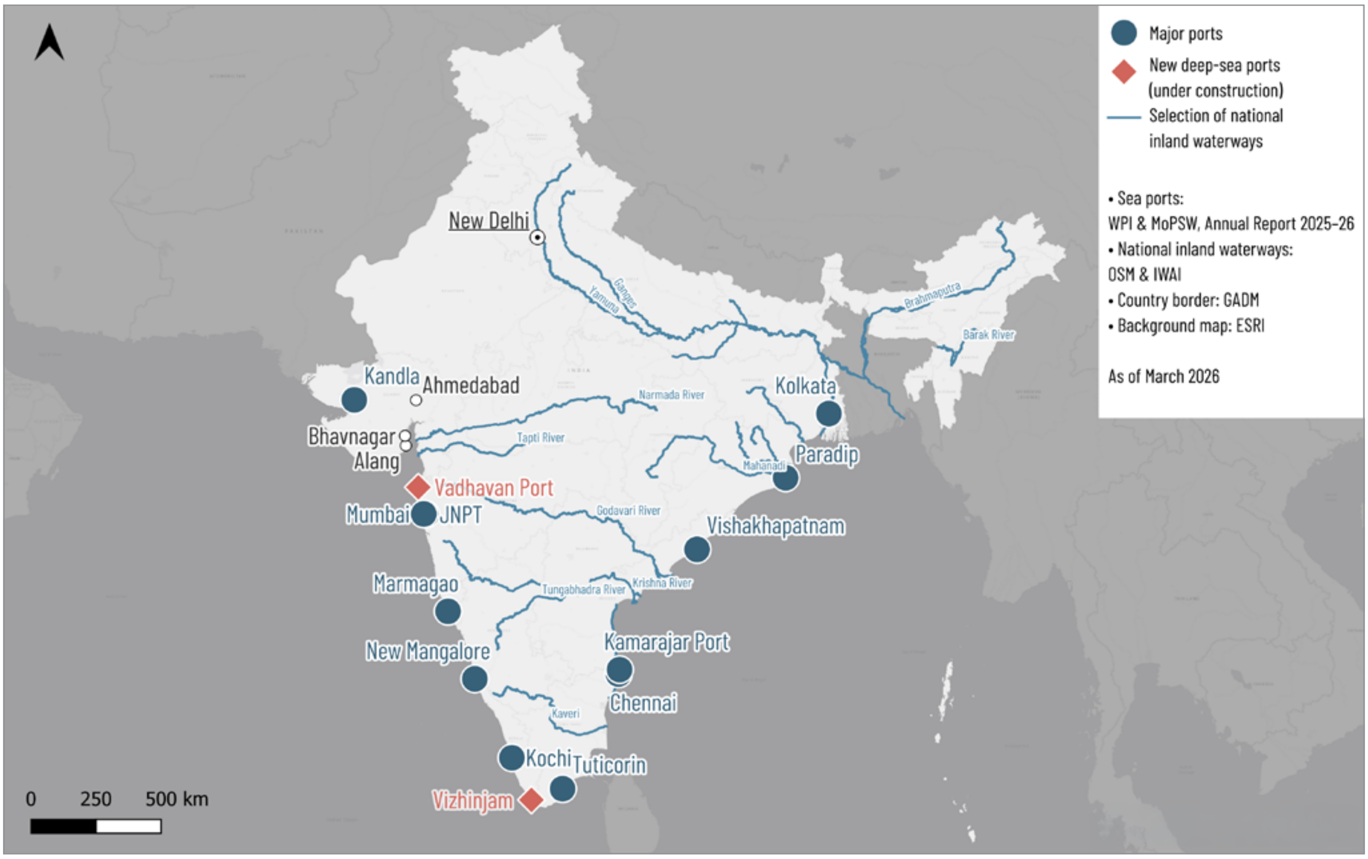

Figure 2: Seaports and national inland waterways (selection) ©German Maritime Centre e.V.

2.4 Ports

The Indian port system is divided into two categories: the government operates twelve major ports, which are under the direct administration of the central government and serve as the key hubs for international container and bulk cargo traffic. In addition, there are around 217 other ports (minor and intermediate ports) which are administered by the respective states and primarily handle regional coastal traffic and smaller trade flows.[17] Another major port, Vadhvan Port, has been under construction since 2024. The total capacity of the twelve major ports was expanded to 1,717.96 million tonnes by the 2025/26 financial year, whilst actual cargo throughput in the 2024/25 financial year stood at 854.86 million tonnes, indicating substantial utilisation and continued growth potential.[18] To involve the private sector more closely, 57 public-private partnership (PPP) projects are currently operational, with a total investment volume of approximately €3.9 billion. These projects provide additional handling capacity of 660 million tonnes per year, thereby making a significant contribution to the modernisation and increased efficiency of the port infrastructure. Since 2019/20 financial year, a total of 49 PPP projects with a total value of approximately €4.8 billion have been approved, of which 25 projects worth approximately €1.2 billion have already been awarded.[19]

16 Ibid., P. 120.
17 Ibid., P. 4.
18 Ibid., P. 52.
19 Ibid., PP. 7-8.

2.5 Budget and Investments

The total budget of the Ministry of Ports, Shipping and Waterways for the 2025/26 financial year amounts to approximately €271 million in Gross Budgetary Support (GBS), of which approximately €192 million had already been spent by 31 December 2025, as well as an additional approximately €1.3 billion under Internal and Extra-Budgetary Resources (IEBR, including PPP)[20], of which approximately €759 million had been spent by the end of December 2025. The budget for 2026/27 provides for further increases: approximately €483 million for GBS and approximately €1.2 billion for IEBR.[21] The Sagarmala programme comprises a total of 839 identified projects with an estimated total investment volume of approximately €54.1 billion, which are due to be implemented by 2035: Of these, 277 projects worth approximately €25.7 billion have already been successfully completed, 209 projects worth approximately €15.1 billion are currently in the implementation phase, and a further 353 projects with a volume of approximately €13.2 billion are in the planning phase.[22]

2.6 Future Projects

The 2025/26 Indian Budget established the Maritime Development Fund (MDF) with an authorised capital of approximately €2.3 billion, designed to provide long-term, low-cost financing for projects in the shipping, port modernisation, shipyard and maritime infrastructure sectors, with loan terms of up to 20 years. The fund consists of two components: the Maritime Investment Fund (MIF) with approximately €1.9 billion for shipping, port and shipyard projects, and the Interest Incentive Fund with approximately €467 million for port infrastructure projects.[23] One of the most significant major projects is the International Container Transshipment Port on Great Nicobar Island in Galathea Bay, which is being developed at an estimated cost of approximately €6.7 billion (according to recent reports, as much as approximately €9.3 billion) and is intended to have a capacity of 20.4 million TEU, serving as a regional hub for container transhipment traffic in the Indian Ocean and reducing dependence on foreign transhipment ports such as Colombo and Singapore.[24] Another major project is Vadhvan Port, which is being developed at a total cost of approximately €7.1 billion. It is set to become an all-weather greenfield container terminal with the highest capacity in the Palghar region.
In addition, the Green Port Programme Initiative and the Green Tug Transition Programme promote the use of environmentally friendly technologies and alternative fuels in ports and on ships to support India's climate targets.[25]

3. The EU-India Free Trade Agreement and its impact on the German maritime sector

3.1 Overview of the Agreement

Essentially, the FTA operates through two mechanisms: tariff and non-tariff provisions. Tariff provisions involve the direct reduction of customs duties on goods. The agreement liberalises a total of 96.6% of India's tariff lines and immediately cuts customs duties on machinery and ship components – which previously could have been as high

20 GBS refers to direct budgetary funds from the Indian government that are allocated to ministries and programmes without any obligation to repay, whilst IEBR describes funds mobilised independently by state-owned enterprises – from their own profits or market financing – which do not appear in the national budget.
21 See Government of India/Ministry of Ports, Shipping and Waterways 2026, PP. 4-5.
22 Ibid., P. 21.
23 Ibid., P. 6.
24 Ibid., P. 5.
25 Ibid., P.6.

as 16% – by half. The remainder will be phased out over a period of up to ten years.[26] Non-tariff provisions address regulatory frameworks: market access for services, technical standards, trade facilitation and rules of origin. This creates new strategic opportunities for the German maritime sector, but also gives rise to competitive and compliance risks that affect a wide range of areas.

3.2 Shipbuilding: Export opportunities and the pressures of globalisation

The German shipbuilding industry is benefiting from the tariff provisions of the FTA. Specifically, as part of its Vision 2030, the Indian government is pursuing a strategy to increase its global share of shipbuilding from less than 1% to at least 5% by 2030.[27] In addition to major investment projects totalling approximately €4.2 billion[28], this includes the expansion of shipyards and opportunities for joint ventures and equipment suppliers – with a strong focus on German expertise. This strategy is supported by the newly established Indian MDF. For German suppliers and potential joint venture partners, this fund creates concrete starting points for structured market development – particularly via the MIF. For the German maritime industry, this also opens up a strategic de-risking option: in the medium term, India can, as a partner, help to reduce existing dependencies on Chinese shipyards, intermediate products and supply chains, and strengthen the industry's own resilience.[29] For the German shipbuilding industry and its supply chain, the FTA thus offers a substantial advantage in terms of direct access to export markets. German manufacturers of marine propulsion systems, marine machinery and specialised equipment stand to benefit directly from the removal of tariffs, thereby strengthening their competitive position against Asian rivals in the rapidly growing Indian market. This is demonstrated by recent examples: in April 2025, MAN Energy Solutions (now Everllence) signed a contract with the state-owned Hindustan Shipyard Ltd. in Visakhapatnam for the supply of main propulsion packages for the Indian Navy – ten MAN 20V32/44CR engines, shaft generators, bow thrusters and MAN Alpha Navy CPP systems.[30] Thyssenkrupp Marine Systems also secured a record order worth around US$8 billion to build submarines for the Indian Navy – one of the largest defence contracts in the company's history.[31] Both contracts serve as examples of the scale the Indian market has already reached for German maritime systems suppliers – and of the additional potential that preferential market access through the FTA could unlock for the civil shipbuilding industry and its suppliers. Added to this is a growing demand for green retrofit solutions and specialised vessels, which is particularly well suited to the quality profile of German companies.[32]

Chapter 16 of the FTA (Trade and Sustainable Development) could also provide a catalyst for reform in India's ship recycling industry.[33] The challenge, however, is that the EU Ship Recycling Regulation currently only permits certified facilities included on a European positive list – Indian shipyards are not included on this list, despite demonstrable progress.[34] The FTA could serve as an additional incentive for the full harmonisation of standards, help alleviate capacity constraints for European and German shipowners, and open up new business opportunities in Alang for German environmental technology providers.

26 See European Commission 2026.
27 See Deutsches Maritimes Zentrum 2025, Podcast: Coastal Shipping in India.
28 See chapter 2.1.
29 See China-Strategie der Bundesregierung 2023.
30 See Everllence 2025.
31 See Sasse 2026.
32 See DNV 2024.
33 See European Commission 2026,
34 See Europäische Kommission 2025.

At the same time, the agreement is putting pressure on the industry: India's state-backed focus on expanding its own shipbuilding capacity[35] and the transfer of technology from the EU could turn India into a competitor for the German shipbuilding industry in the fields of specialised[36] and naval shipbuilding. The rules of origin set out in the FTA in a highly bureaucratic and complex manner are resulting in significant compliance costs, particularly for small and medium-sized enterprises in the German supply industry.[37] The Carbon Border Adjustment Mechanism (CBAM), which has been fully in force since January 2026 and is not exempted under the FTA[38], also makes Indian steel imports more expensive, meaning that EU importers and shipyards must factor this levy into their calculations.

3.3 Shipping: A growth market facing regulatory pressures and geopolitical uncertainties

The FTA opens up new opportunities for shipping companies and liner operators: stronger trade links between the EU and India are boosting demand for container, breakbulk and specialised cargo services.[39] The non-tariff trade facilitation rules enshrined in the agreement will shorten customs clearance times and create digital interfaces that measurably reduce transit times on the Europe-India route.[40] Growing demand in India for sustainable transport solutions also offers German shipping companies with modern fleets an opportunity to position themselves as green shipping providers.[41]
In contrast, the agreement introduces strict digital tracking and transparency requirements. Emissions monitoring, cargo tracking and digital customs clearance require significant investment in IT.[42] Added to this is the risk that Indian IT service providers could enter the market for maritime software solutions, in which German providers are well established. The parallel application of CBAM, the EU Emissions Trading System (ETS),[43] FuelEU Maritime and FTA rules also creates regulatory complexity that presents companies with significant management challenges.[44]
However, the economic opportunities the FTA offers the shipping industry cannot be viewed in isolation from the geopolitical context of the route. The main trade route between Europe and India passes through some of the world's most critical maritime chokepoints in terms of security: the Red Sea, the Bab al-Mandab Strait and the Gulf of Aden. The current armed conflicts between the US and Israel on one side and Iran on the other are shaking the Middle East region, with a high potential for escalation. In response, the Houthi rebels have announced that they will resume attacks on ships in the Red Sea.[45] At the same time, Somali pirate attacks in the region are flaring up repeatedly, further exacerbating the security threat. The Association of German Shipowners has long been calling for effective protection of maritime routes – if necessary through an increased military presence – as the safety of seafarers and the stability of global supply chains must be given the highest priority.[46] For the use of the EU-India maritime corridor, this means that the economic potential of the FTA depends largely on whether security can be guaranteed along this key route. For this reason, both parties have signed a security and defence partnership in parallel with the FTA, with the aim of addressing the areas of maritime security, counter-terrorism and cyber security on a permanent basis, both politically and operationally, as a key complement to German shipping.[47]

35 See Wygand 2025.
36 See Kapoor/Katsoulas 2025.
37 See Treier 2026.
38 See European Commission 2026.
39 See Jay 2026.
40 See European Commission 2026.
41 See DD News 2025.
42 See Marine Link 2026.
43 See European Commission 2025.
44 See Goess 2025.
45 See Meyer 2026.
46 See Verband Deutscher Reeder e. V. 2026.
47 See European Union External Action 2026.

From a global perspective, the FTA strengthens the resilience of European supply chains through strategic diversification in the Indo-Pacific and enables Germany's maritime sector to take a concrete step towards greater independence from China and the US. At the same time, India remains a complex partner for the EU: the country pursues a multi-vector policy and maintains close strategic relations with Iran and Russia – including in the maritime defence sector. This gives rise to compliance risks for German shipping companies and shipbuilders under the EU sanctions regime, which require careful monitoring and clear internal regulations.

3.4 Ports and Logistics: Digital Transformation as a Competitive Factor

The FTA significantly reduces Indian tariffs, thereby creating predictable flows of goods and driving growing demand for integrated logistics solutions (transport, customs clearance, warehousing, supply chain management).[48] At the same time, India is becoming an increasingly important production and sourcing hub, which is significantly increasing the demand for import/export solutions, consolidation and multimodal transport (seaports, coastal and inland waterways).[49] Port and terminal operators and logistics service providers stand to benefit from the FTA through growing trade volumes on the Europe-India route. The Customs and Trade Facilitation chapter is also having a positive impact in this area through faster clearance, advance rulings and simplified procedures that boost cargo handling in ports. Concrete export opportunities are emerging for German suppliers of port automation, terminal operating systems, port community systems and green port technologies. India's substantial investment of €54.1 billion in the Sagarmala programme is aimed at a comprehensive modernisation of port infrastructure, and the country is actively seeking international technology partners.[50]
Risks arise particularly where German companies are seeking to make direct capital investments in India: the FTA does not contain a separate chapter on investment protection – this area is being negotiated separately, creating legal uncertainty for long-term investments in the meantime.[51]
The FTA makes trade between the EU and India more attractive, but only for those who have integrated compliance with the EU Deforestation Regulation (EUDR) and CBAM into their logistics IT systems. Without timely system adaptations, the trade opportunities offered by the FTA will be hampered by regulatory hurdles. India exports large quantities of goods subject to the EUDR (rubber, timber products, leather, coffee, processed cocoa products), as well as products subject to CBAM, to the EU. The EUDR and CBAM reporting requirements increase the demands along the entire logistics chain and necessitate early integration into logistics IT. This data must be digitally recorded, documented and communicated throughout the entire supply chain[52] from production facilities and logistics providers to EU importers. Consequently, both regulations require early integration into transport management systems, customs software and supply chain platforms.

3.5 Skilled workers: New recruitment channels

The mobility of skilled workers and visa facilitation are not formally part of the agreement, as these matters fall within the remit of the EU Member States rather than the European Commission. In parallel with the FTA, however, the EU and India have signed a Memorandum of Understanding (MoU) on a Comprehensive Framework for Cooperation

48 See See Jay 2026.
49 See Aranca 2025.
50 See Cranworth 2025.
51 See Europäische Kommission 2026.
52 See European Commission 2026.

on Mobility, which is intended to facilitate the free movement of highly skilled professionals, students, researchers and seasonal workers.[53] For seafarers, the International Convention on Standards of Training, Certification and Watchkeeping for Seafarers (STCW Convention)[54] remains the primary legal framework for the recognition of qualifications.
At the same time, the FTA facilitates market access for German vocational training providers in India, where structural gaps in maritime vocational training are creating significant demand for skilled workers.[55] German institutions can make a targeted contribution to the training of skilled workers through train-the-trainer programmes, joint ventures and the export of dual vocational training models – supported by the FTA mobility regulations for contractual service suppliers and intra-corporate transferees.[56] Unlike general mobility and visa regulations, the FTA provisions on contractual service suppliers and intra-corporate transferees, as Mode 4 arrangements, fall within the European Commission's trade agenda and are therefore part of the agreement.[57]

4. Conclusion: New scope for action in times of geopolitical turmoil

India is investing heavily in the expansion of its maritime infrastructure and shipbuilding capacity – including through the ambitious Sagarmala programme for the comprehensive modernisation of its ports and waterways – thereby laying the foundations for a deeper partnership with the EU and Germany in the maritime sector. The EU-India FTA has the potential to become a structurally significant agreement for the German maritime sector, offering concrete levers for action across large parts of the industry. The opportunities are real – demonstrable through robust figures in the areas of market access and investment, and of a more structural nature in the area of geopolitical diversification. Whilst the FTA's tariff reductions directly benefit shipbuilding and exporting suppliers, the real potential for the maritime sector lies in the non-tariff regulations – particularly regarding market access for services and trade facilitation. With the Maritime India Vision 2030 and the outlook for 2047, India is pursuing a far-reaching strategy to modernise its maritime infrastructure and expand shipbuilding capacities – thereby opening up the possibility of becoming a strategic partner for the German maritime sector.
Current developments in Iran and the Middle East remain to be seen – including whether and how they will influence India's willingness to swiftly ratify and implement the FTA with the EU. Given New Delhi's pragmatic and interest-driven foreign policy and its strategic partnership with Iran, it cannot be ruled out that changing geopolitical constellations in the region will affect India's priorities regarding the trade agreement.

53 See European Union 2026.
54 See Deutsche Flagge 2026.
55 See Wenke 2026.
56 See Government of India/Ministry of Commerce and Industry/Department of Commerce 2026.
57 See Eurostat 2026.

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