Industry Consumption Review

March 2020

पेट्रोलियम योजना एवं विश्लेषण प्रकोष्ठ

पेट्रोलियम एवं प्राकृतिक गैस मंत्रालय

Petroleum Planning & Analysis Cell

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HIGHLIGHTS OF THE REPORT

The Coronavirus (COVID-19) outbreak, which started in Wuhan, China in late December 2019, has now infected 2.5 million people the world over, becoming a global emergency. The outbreak was declared a Public Health Emergency of International Concern on 30th January 2020 by the WHO.

The demand for oil and petroleum products slowed down significantly in the later half of the month of March 2020 post the COVID-19 outbreak. Restrictions, travel advisories as well as slow down of industrial activity as a result of the containment measures taken to prevent the spread of corona virus pandemic affected demand of petroleum products in all sectors including manufacturing, aviation, transport, tourism, hospitality, e-commerce, retail activities dependent on supply chain , import/export and real estate.

Domestic demand for petroleum products contracted. However, the consumption of LPG appeared to be stable as the Coronavirus outbreak severely restricted public movement and slowed down economic activity.

The summary of product-wise impact on consumption in the month of March 2020 is as follows.

1. Overall, Petroleum products consumption during the month of March 2020 recorded a de-growth of -17.8% as compared to consumption in March 2019. The products which registered growth during March 2020 were LPG 1.9%, Naphtha 15.7% and LDO 5.2% whereas products which registered de-growth were Diesel (HSD) -24.2%, Petrol (MS) -16.4%, Aviation Turbine Fuel (ATF) -32.4%, Bitumen -41.0%, Furnace Oil & Low Sulphur Heavy Stock (FO/LSHS) -10.3%, Lubes & Greases -34.9%, Pet coke -22.2%, and products categorised under "Others" category -5.7%. Consumption for the year 2019-20 saw a growth of 0.2% as compared to the last year.

2. MS sales recorded a de-growth of -16.4% in the month of March 2020 and dipped for the first time after having recorded a continuous growth for last thirty months. The containment measure for pandemic adversely impacted demand as it slowed down the economic activities with the lock down announced on 24th March 2020 for a period of 21 days. Overall, the consumption of MS for the year 2019-20 registered a growth of 6.0% as compared to 2018-19.

3. Diesel consumption recorded a de-growth of -24.2% during March 2020 as compared to March 2019. A sharp fall was witnessed due to complete suspension of all industrial and transportation activities with an exception of essential and emergency services. HSD consumption for the year 2019-20 registered a de-growth of -1.1% over 2018-19. The power deficit in March 2020 remained constant at -0.4% as compared to -0.4% in the month of March 2019. Commercial vehicles sale recorded a drop of -88.1% during the month. Rainfall during the month was 47% above the normal distribution. A de-growth of -5.0% was recorded in port traffic during March 2020 as compared to March 2019.

4. LPG consumption recorded a growth of 1.9% in March 2020 as compared to March 2019 mainly due to cooking at home while people stayed indoors in the lockdown. Total LPG consumption for the year 2019-20 registered a growth of 5.9% as compared to the same period last year.

5. ATF consumption registered a de-growth of -32.4% in the month of March 2020 as many flights were restricted since the beginning of the month and then further complete suspension in air traffic

was in place since 24th March. Consumption of ATF for the year 2019-20 has registered a de-growth of -3.6% as compared to the same period last year.

6. Bitumen consumption during March 2020 recorded a de-growth of -41.0% as compared to March 2019, mainly due to suspension of infrastructure related activities as a result of safety measures adopted for the pandemic. Bitumen consumption for the year 2019-20 recorded a de-growth of -4.9% compared to the same period last year.

7. Kerosene (SKO) consumption registered a de-growth of -47.9% in March 2020 as compared to March 2019 mainly due to few States & all Union Territories except UT of Jammu & Kashmir and Ladakh going Kerosene free and there was also voluntary surrender of PDS Kerosene quota by few States. SKO consumption for the year 2019-20 has registered a de-growth of -30.7% compared to the same period last year.

This report analyses the trend of consumption of petroleum products in the country during the month of March 2020. Data on product-wise monthly consumption of petroleum products for March 2020 is uploaded on the PPAC website (www.ppac.gov.in) and on the mobile app “PPACE (PPAC-Easy)” .

1.0 CONSUMPTION:

The growth (%) in consumption of petroleum products, category-wise, for the month of March 2020 is given in Table-1.

Table-1: Petroleum Products Consumption (Quantity in TMT)

Product Type	Share %	March - 2019	March - 2020	Growth (%)	Products included
Sensitive Products	15.3	2553	2458	-3.7	SKO & LPG
Major Decontrolled Products	68.6	13879	11029	-20.5	HSD, MS, Naphtha, Lubes, LDO, FO/LSHS, Bitumen & ATF
Minor Decontrolled Products	16.1	3132	2596	-17.1	Petcoke & other minor products
Total	**100**	**19564**	**16083**	**-17.8**	

All Products:

India's petroleum products consumption in the month of March 2020 registered an overall de-growth of -17.8% as compared to a growth of 4.5% during February 2020, due to the impact of COVID-19. Consumption of petroleum products during March 2020 was 16.1 MMT as against 19.6 MMT in March last year. The month of March 2020 saw a growth in consumption of products like LPG 1.9%, Naphtha 15.7% and LDO 5.2%. Products which registered de-growth were Diesel (HSD) -24.2%, Petrol (MS) -16.4%, Aviation Turbine Fuel (ATF) -32.4%, Bitumen -41.0%, Furnace oil & Low Sulphur Heavy Stock (FO/LSHS) -10.3%, Lubes & Greases -34.9%, Petcoke -22.2 and products categorised under "Others" -5.7%. A drop of 47.9% was reported in Kerosene consumption during the current month.

Total cumulative consumption for the year 2019-20 has shown a growth of 0.2% compared to the same period last year. LPG 5.9%, Petrol (MS) 6.0%, Naphtha 2.2%, Light diesel oil (LDO) 5.0% and Petcoke 1.5% contributed to growth during the year 2019-20 as compared to same period last year. A de-growth was recorded for Diesel (HSD) -1.1%, ATF -3.6%, Bitumen -4.9%, Furnace Oil & Low Sulphur Heavy Stock (FO/LSHS) -7.2%, Lubes & Greases -0.8%, and products categorised under "others " -1.6%.

A drop of 30.7% was recorded in the consumption of Kerosene during the current Financial Year of 2019-20 as compared to 2018-19.

Figure-1 gives a comparison of monthly POL consumption (MMT) and growth (%) since April 2018.

Figure-1: Comparison of monthly POL consumption (MMT) and growth (%) since April 2018

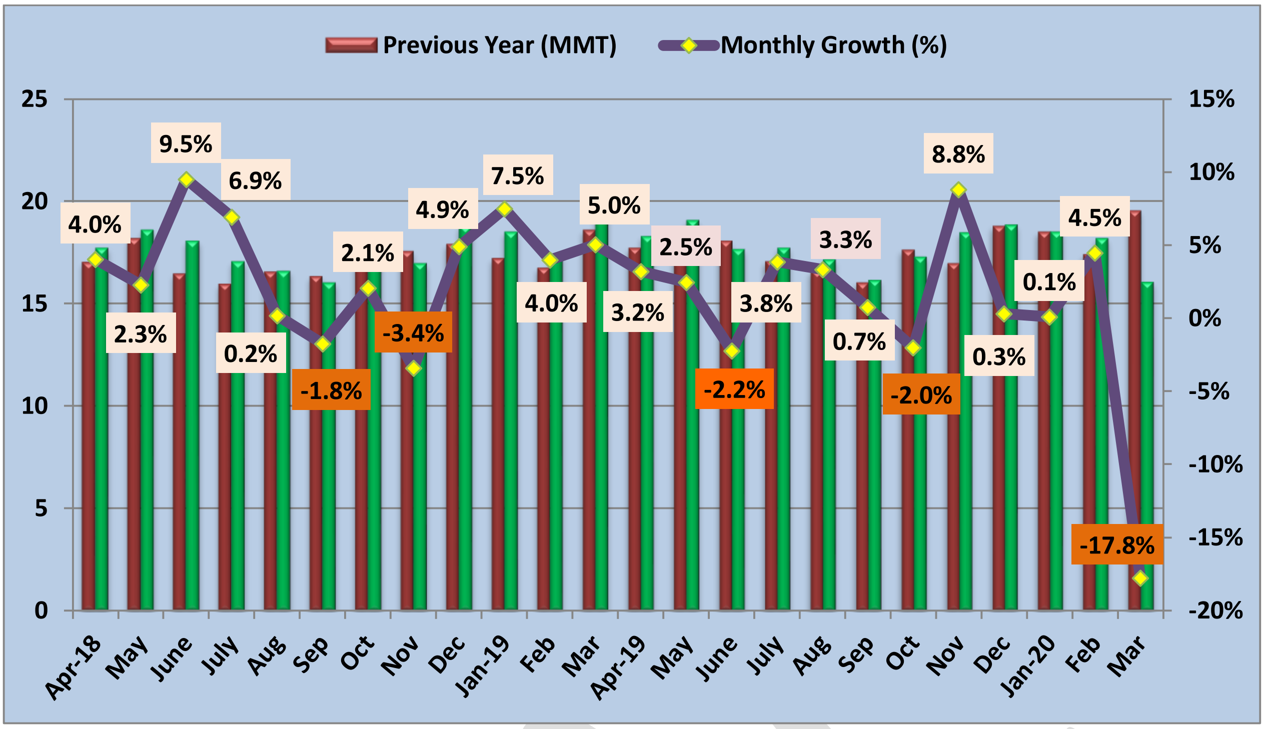
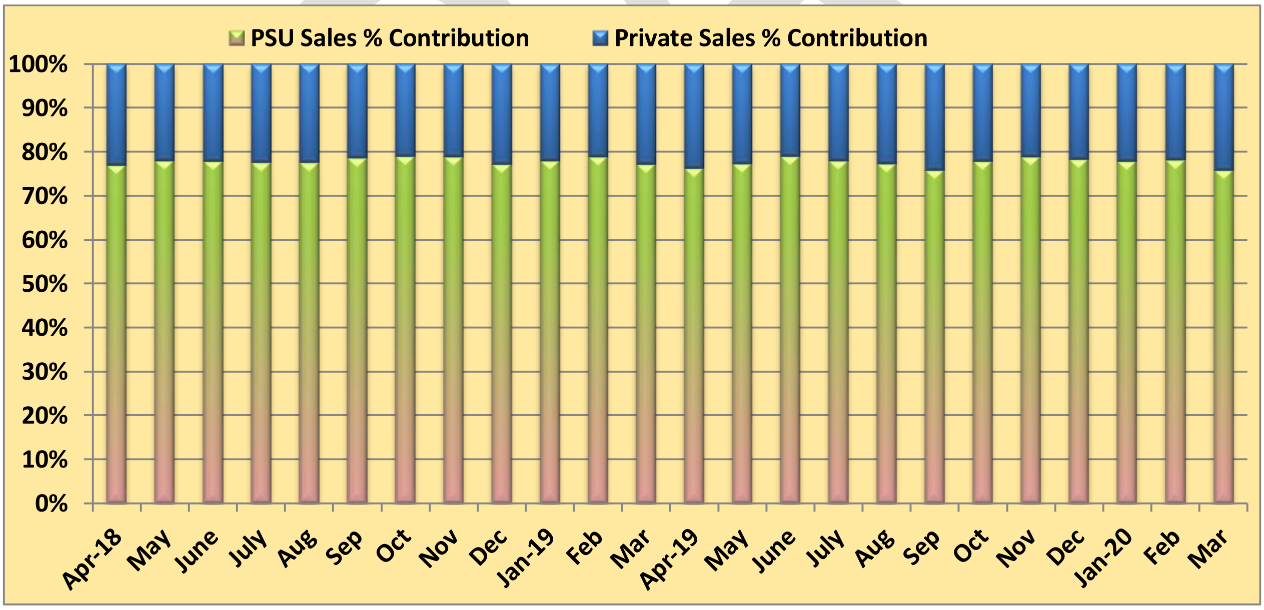


Figure-2 gives a comparison of percentage of monthly sales volumes of all petroleum products by PSUs and Private Oil companies since April 2018.

Figure-2: Comparison of monthly POL Sales in PSU & Private Sector (%) since April 2018



PPAC analyzes the sales recorded by the Industry and domestic sales by SEZ units based on available data. Data on direct private imports is received from DGCIS, which is added to the final sales reported by oil companies and domestic sales by SEZ units, for estimation of consumption figures, are available up to December 2019. Private imports data for January 2020, February 2020 and March 2020 are projected based on January 2019 to December 2019 actual data.

Product-wise analysis of growth for March 2020 is given below:

1.2 Petrol / Motor Spirit (MS):

MS consumption recorded its first dip after a steady growth for thirty months in a row, registering a de-growth of -16.4% in the month of March 2020 with sales of 2.2 MMT as compared to 2.6 MMT in March 2019. The consumption of MS for the year 2019-20 registered a growth of 6.0% compared to the same period last year. Major factors affecting MS consumption during the month are:

i. Since beginning of the month of March several states had started taking preventive measures like closures of educational institutes, cinema halls, malls, gyms and other public places against the spread of Corona virus.

ii. Since 24th March lock down of the country to immediately contain the pandemic resulted in curtailing the movement of passenger vehicles on the road for non-essential travel.

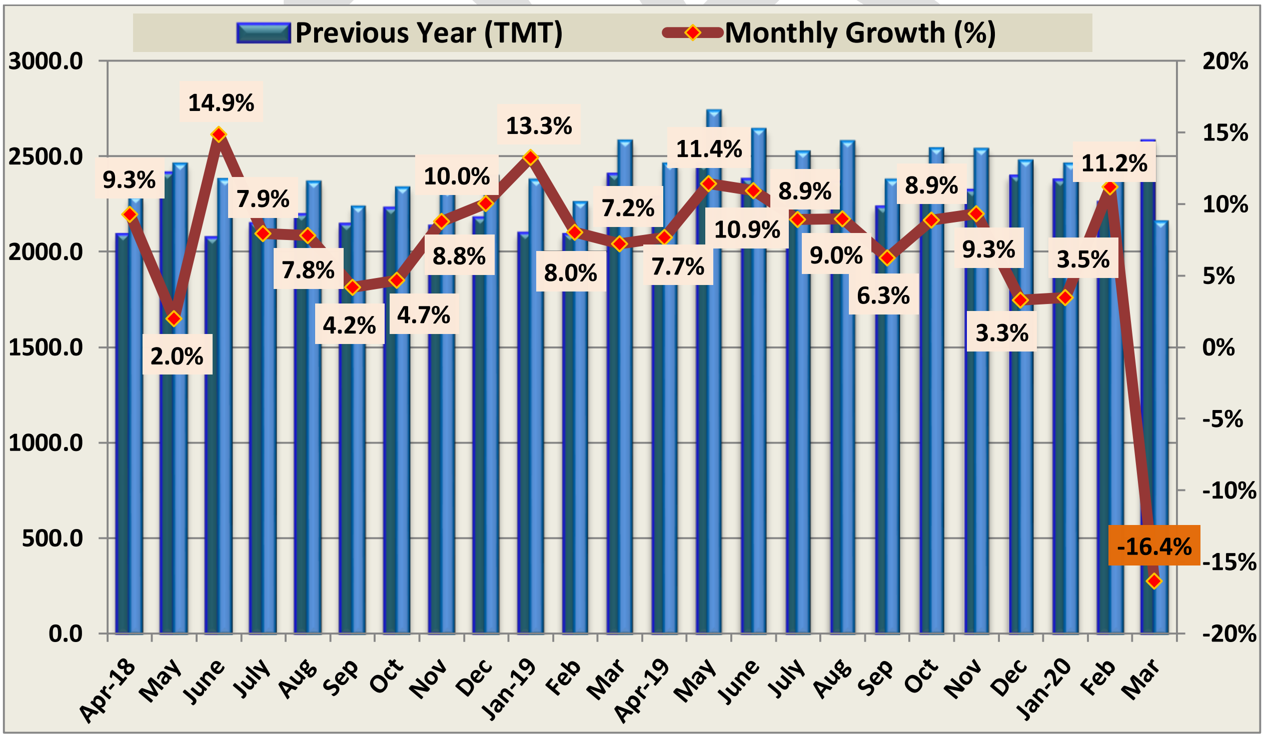
iii. The movement of two wheelers was immediately restricted and special permission /passes were issued to allow those travelling for essential jobs. The movement of daily wage workers and construction labourers had also to be restricted to contain the Virus spread. States of Uttar Pradesh, Maharashtra, Tamil Nadu, Kerala and Delhi are the highest losers in terms of MS sales volumes in the month of March 2020 while all the states across the country have shown a de-growth in MS sales volume.

iv. Stagnant economic activities, closure of e-commerce activities, restricted movement of delivery boys, orders for work from home and social distancing resulted in drop of MS sales.

Figure-3 gives month-wise MS consumption volume (TMT) and month-on-month growth

(%) since April 2018.

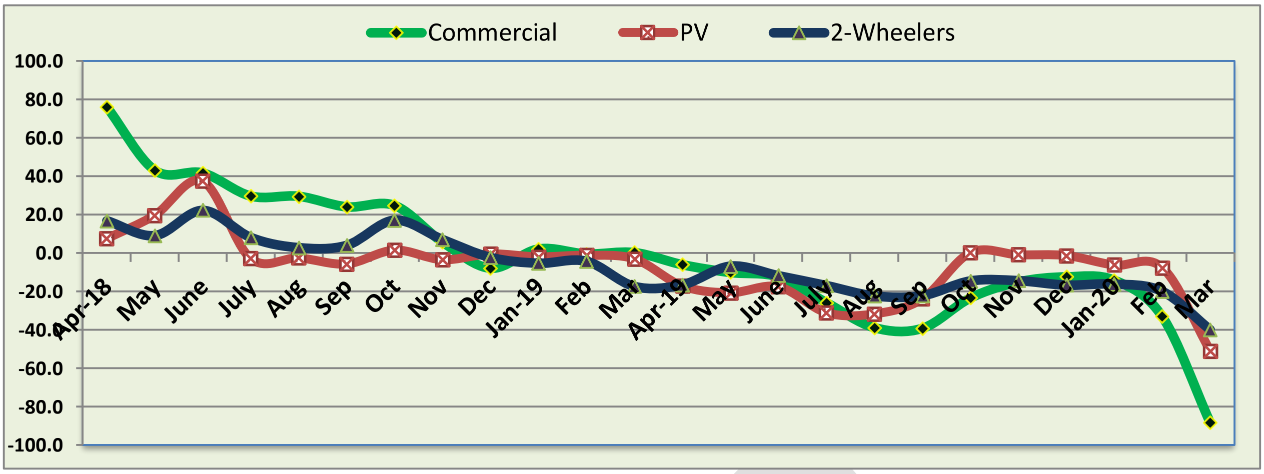
Figure-3: Month wise MS consumption (TMT) and growth (%) since April 2018



Other factors impacting consumption of MS are:

Figure-4 gives a graphic representation of month-wise growth percentages of passenger vehicles, commercial vehicles and 2-wheelers since April 2018.

Figure-4: Month-wise sales growth (%) of Indian Automobile Industry since April 2018



Total passenger vehicles (PV) sales: The passenger vehicle sales continued to remain negative with a de-growth of -51.0% in the month of March 2020 with the implementation of BS VI norms with effect from 01.04.2020 and country wide lockdown. Passenger vehicle sales for the year 2019-20 registered a de-growth of -17.8% as compared to the same period last year.

Passenger car, utility vehicles and vans recorded a drop of -52.1%, -44.7% and -69.9% respectively during the current month. All segments of passenger vehicles were affected in the month by the BS VI norms to be implemented wef 01.04.2020 and the nationwide lockdown to contain Corona Pandemic. On cumulative basis, passenger cars and vans recorded a drop of -23.5% and -39.2% respectively while utility vehicles recorded a growth of 0.5%.

Segment	**March**			**April-March**		
	2018-19	**2019-20**	**Growth %**	**2018-19**	**2019-20**	**Growth %**
Passenger Cars	178,019	85,229	-52.1	2,218,489	1,697,545	-23.5
Utility Vehicles	93,206	51,569	-44.7	941,474	946,010	0.5
Vans	20,636	6,216	-69.9	217,426	132,124	-39.2
Total PV	**291,861**	**143,014**	**-51.0**	**3,377,389**	**2,775,679**	**-17.8**

Source: Society of Indian Automobile Manufacturers (SIAM)

a) **2-wheeler sales**: The overall sales for two-wheelers declined for the sixteenth consecutive month in the month of March 2020 with a de-growth of -39.8% as compared to last year. The purchase decisions were being postponed awaiting implementation of BS VI norms with effect from 01.04.2020. The measures taken to contain pandemic added to downfall in sales.

In the month of March 2020, scooter sales recorded a drop of -32.1% with a sales figure of 263,181 units. Motorcycle segment recorded a drop of -41.9% with a sales figure of 570,860 units. Moped sales recorded a drop of -53.6% by selling 32,808 units. On cumulative basis scooter, motorcycle and moped sales recorded a drop of -16.9%, -17.5% and -27.6% respectively.

Segment	March			April-March		
	2018-19	2019-20	Growth %	2018-19	2019-20	Growth %
Scooters/ Scooterette	387,552	263,181	-32.1	6,701,430	5,566,036	-16.9
Motor Cycles	982,331	570,860	-41.9	13,598,190	11,214,640	-17.5
Mopeds	70,710	32,808	-53.6	880,227	636,940	-27.6
Total 2 Wheelers	**1,440,593**	**866,849**	**-39.8**	**21,179,847**	**17,417,616**	**-17.8**

Source: Society of Indian Automobile Manufacturers (SIAM)

1.3 High Speed Diesel (HSD): HSD consumption during the month recorded a de-growth of -24.2% (as compared to a growth of 6.3% during February 2020, with a sales of 5.7 MMT in March 2020 as compared to 7.5 MMT in March 2019. Diesel consumption for the year 2019-20 registered a de-growth of -1.1% over the same period last year.

Factors affecting diesel consumption negatively during the current month. :

i. Three-week lockdown undertaken by the Government to curb the spread of the corona virus. Prohibitory orders issued under section 144 in various States completely restricting movements of mass transit vehicles. The restriction on movement of all private and public buses, railways and goods laden trucks etc. impacted the diesel demand.

ii. The shutdown of factories, workplaces and a halt in all kinds of goods transportation to contain the effect of virus.

iii. Closure of mining and stone quarrying operations post lockdown.

iv. Demand disruptions in sectors like chemicals and pharmaceuticals where the effected foreign markets are large importers from India.

v. Loss in merchandise trade in Imports and Exports affecting port traffic. Export and Import trade recorded a loss of 34.6% and 28.7% respectively during the month of March 2020.

Consumption of diesel in agriculture sector in rural contributed positively as the cities were affected by the pandemic.

Figure-5 gives month-wise HSD consumption volume (TMT) and month-on-month growth (%) since April 2018.

Figure-5: Month-wise HSD consumption (TMT) and growth (%) since April 2018

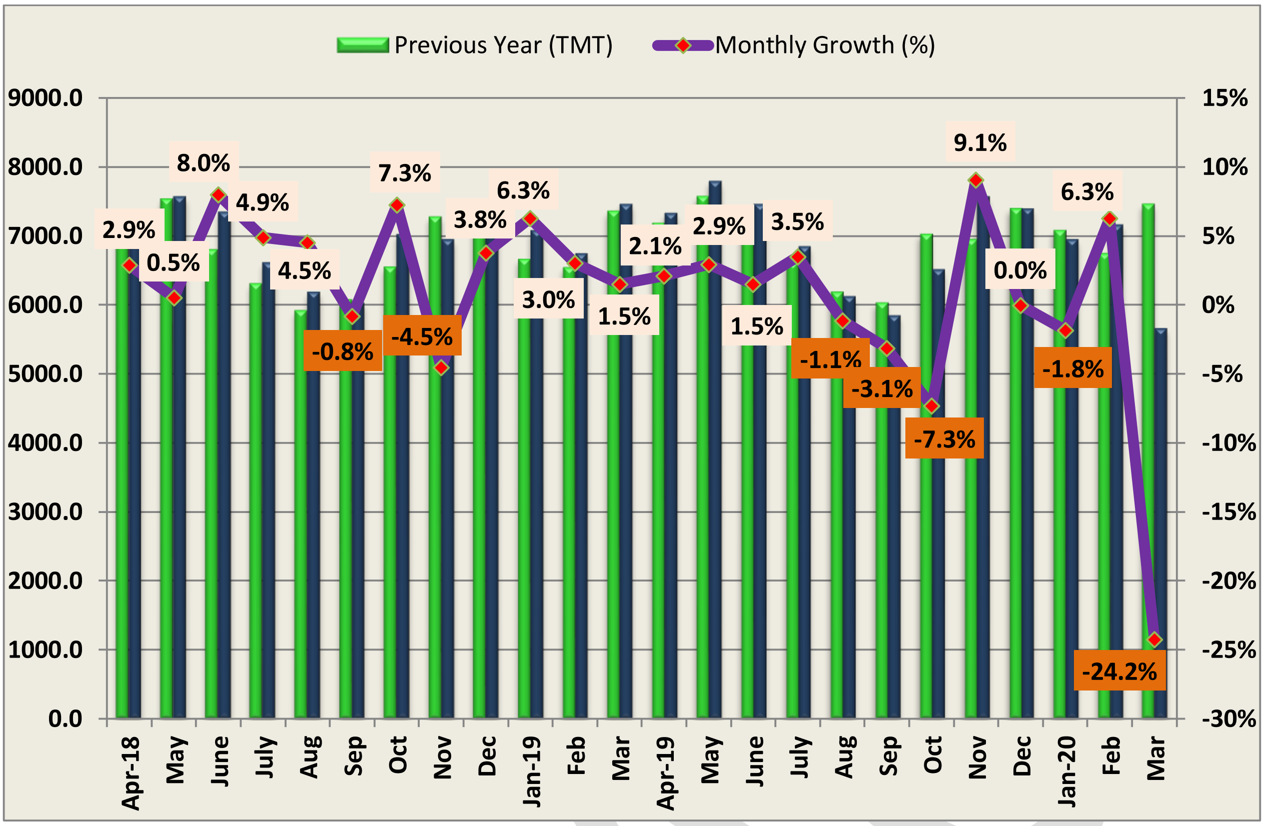
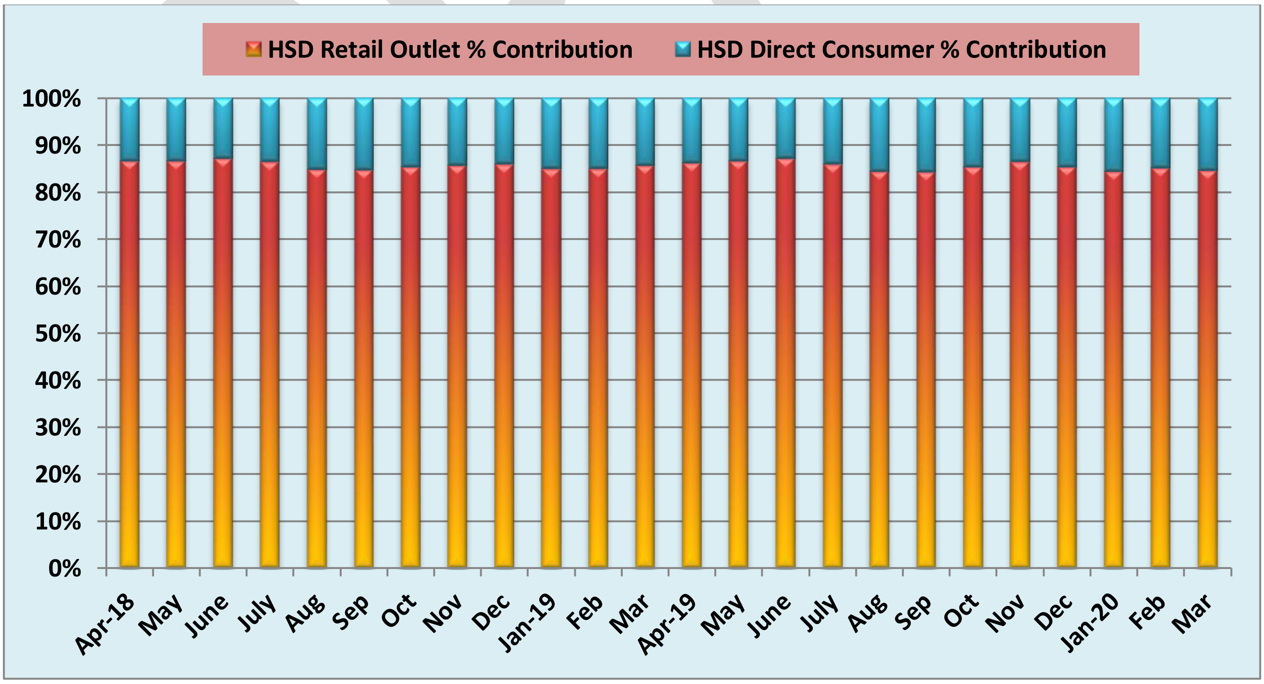


Figure-6 gives a comparison of month-wise percentage of HSD consumption through retail outlets and direct consumer business since April 2018.

Figure-6: **Month-wise HSD consumption by Retail and Direct business share (%) since April 2018**



Other factors affecting diesel consumption are discussed below:

a) **Commercial vehicles (CV) sales**: The commercial vehicle (M&HCV and LCV) segment registered a drop for the twelfth month in a row and recorded a drop of -88.1% in March 2020. The containment measures coupled with the lockdown in the month of March 2020 affected the commercial vehicle sales. M&HCV witnessed a drop of -87.1% in March 2020 by selling 5,645 units vis-a-vis 43,642 units in March 2019.

b) **Light Commercial Vehicle (LCV)**: The LCV segment witnessed a drop of -88.7% during the month of March 2020 as compared to the same period last year. LCV sector contributed sales of 7,382 units as against 65,380 units during March 2019.

On cumulative basis the commercial vehicle segment (M &HCV) & LCV recorded a de-growth of -42.5 % & -20.1% and total commercial vehicle segment recorded a drop of -28.8% during the year 2019-20 as compared to same period last year.

Segment	March			April-March		
	2018-19	2019-20	Growth %	2018-19	2019-20	Growth %
M & HCV	43,642	5,645	-87.1	390,732	224,806	-42.5
LCV	65,380	7,382	-88.7	616,579	492,882	-20.1
Total C'l Vehicles	**109,022**	**13,027**	**-88.1**	**1,007,311**	**717,688**	**-28.8**

Source: Society of Indian Automobile Manufacturers (SIAM)

c) **Port traffic:** The traffic handled at major ports in India recorded a de-growth of -5.1% and together handled 61.9 MMT of cargo during March 2020 as against 65.2 MMT handled during the corresponding period of the previous year. A growth of 0.8% was registered in the port traffic for the cumulative period April to March 2020 as compared to same period last year. All the major ports recorded a dip in cargo handled during the month of March 2020 except the ports of V.O. Chidambaranar (Tuticorin), Cochin and New Mangalore.

During the year 2019-20, growth was registered specifically in Petroleum Oil & lubricants (POL) 2.1%, other liquids 0.1%, iron ore 35.2%, fertilizer finished 12.7%, coking & others coal 2.6% and containers 1.0%. A de-growth was observed in fertilizer raw -5.5%, thermal & steam coal -12.7% and miscellaneous cargo -4.8%. While iron ore mining activities have increased in Karnataka and Odisha, it continues to be severely restricted in Goa. Commodity-wise, the percentage share of POL was maximum i.e. 33.7%, followed by container 20.8%, thermal & steam coal 13.1%, other miscellaneous cargo 10.1%, coking & other coal 8.1%, iron ore & pellets 7.8%, other liquids 4.2%, finished fertilizer 1.3% and raw fertilizer 0.9%.

Table-2 below gives the port-wise performance during the month of March 2020

Table-2: Traffic handled at major ports in March 2020

Traffic handled at major ports (TMT)			
Ports	**March 2019**	**March 2020**	**Growth (%)**
KOLKATA + HALDIA	6,118	5,428	-11.3%
PARADIP	10,546	10,062	-4.6%
VISAKHAPATNAM	6,108	5,986	-2.0%
KAMARAJAR (ENNORE)	3,071	2,758	-10.2%
CHENNAI	4,525	3,584	-20.8%
V.O. CHIDAMBARANAR	3,081	3,230	4.8%
COCHIN	2,922	3,162	8.2%
NEW MANGALORE	4,021	4,847	20.5%
MORMUGAO	1,408	1,289	-8.5%
MUMBAI	5,608	4,317	-23.0%
JNPT	6,531	6,068	-7.1%
DEENDAYAL (KANDLA)	11,230	11,136	-0.8%
TOTAL:	**65,169**	**61,867**	**-5.1%**

Source: Indian Ports Association (IPA)

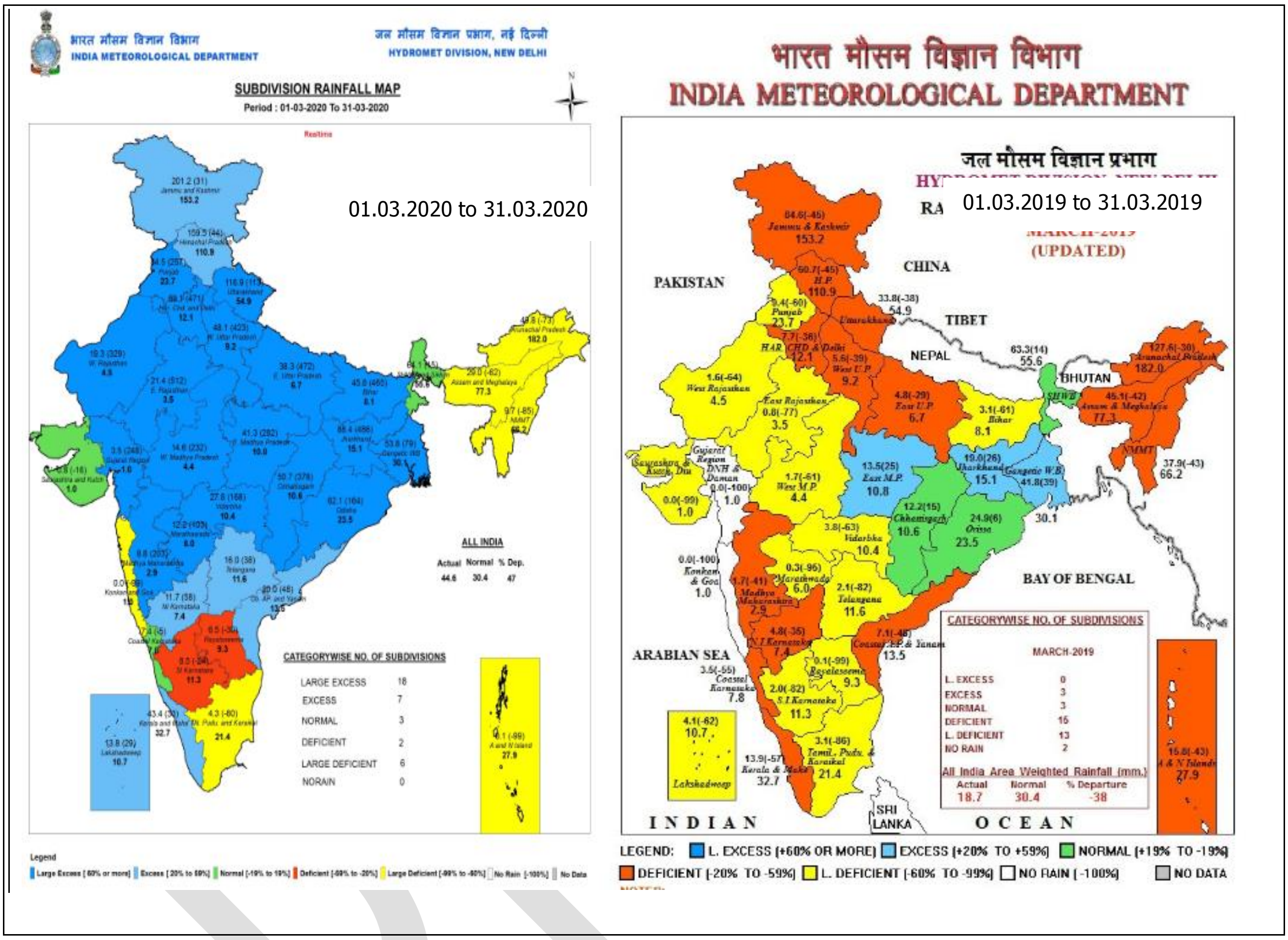
d) **Power situation**: The position of power supply for the month of March 2020 is given in Table-3. As per the data reported, power deficit position has remained constant at -0.4% in the month of March 2020 as in March 2019. The deficit was mainly in the state Uttar Pradesh and UT of Jammu & Kashmir and Ladakh.

Table-3: Power deficit: Region-wise position for March 2020 (% deficit)

States	March - 2020				March - 19
	Requirement (MU)	Available (MU)	Deficit		Deficit
			MU	(%)	(%)
North	23,677	23,284	-393	-1.7%	-1.5%
West	31,391	31,391	0	0.0%	0.0%
South	32,294	32,293	-1	0.0%	0.0%
East	10,238	10,238	0	0.0%	0.0%
North-East	1,225	1,198	-27	-2.2%	-2.1%
Total	**98,824**	**98,404**	**-421**	**-0.4%**	**-0.4%**

Source: Central Electricity Authority (CEA)

e) Seasonal rainfall scenario: The rainfall in the country during March 2020 was almost 47% above normal precipitation. A rainfall of 44.6 mm was recorded in the month of March 2020 as against a normal reading of 30.4 mm. Out of total 36 sub divisions, 28 divisions received from normal to large excess rainfall whereas 8 divisions received deficient to large deficient rainfall.

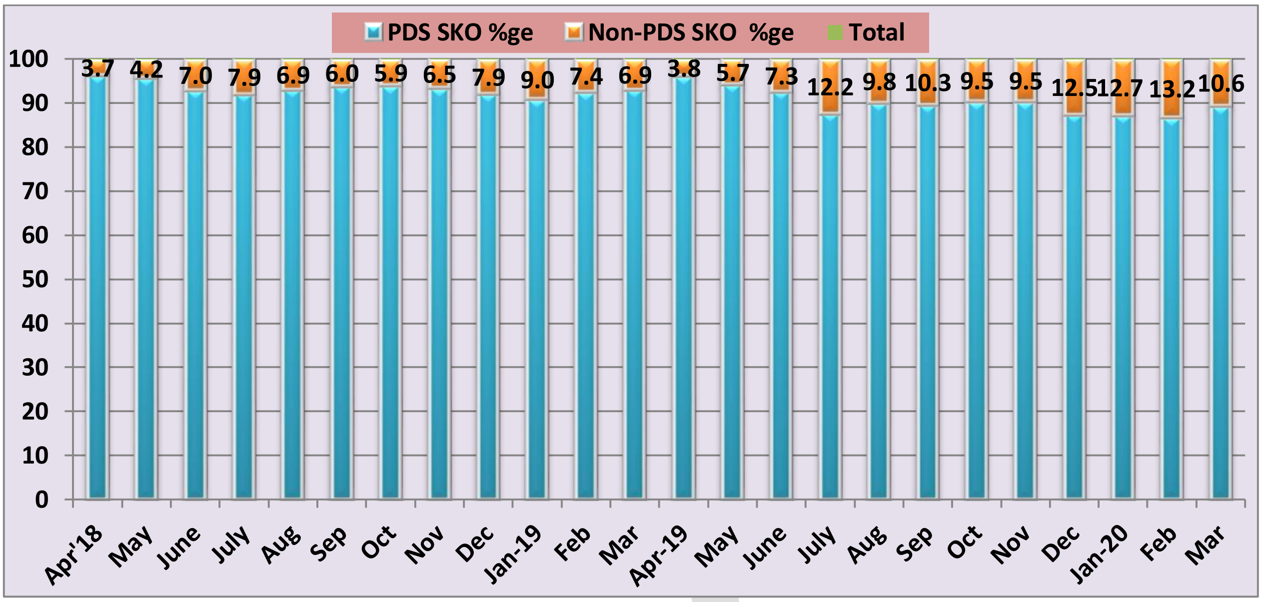


Source: India Meteorological Department (IMD)

1.4 Kerosene: Kerosene consumption registered a de-growth of -47.9% during the month of March 2020 as compared to March 2019. The cumulative consumption of SKO for the year 2019-20 has shown a de-growth of -30.7% as compared to the same period last year. All UTs except the UT of J&K and Ladakh have been declared kerosene free. While the states Andhra Pradesh, Delhi, Haryana and Punjab have been declared kerosene free. The month of March 2020 saw nil upliftment by Goa. States like Gujarat, Bihar, Uttar Pradesh and Maharashtra have also voluntarily surrendered a certain quantity of PDS SKO allocation.

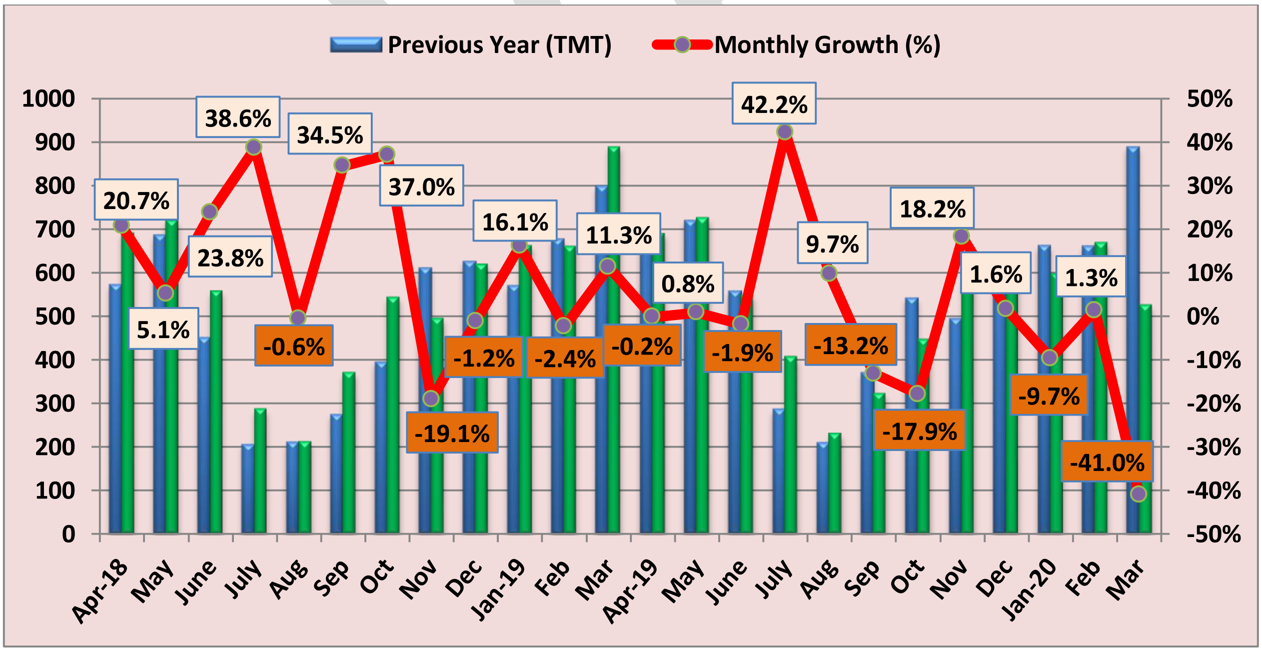
Figure-7 gives a comparison of kerosene sales in public distribution system vis-à-vis Non-PDS system since April 2018.

Figure-7: **Month-wise PDS & Non PDS SKO consumption in share (%) since April 2018**



1.5 Bitumen: Bitumen consumption during March 2020 recorded a de-growth of -41.0% as compared to March 2019. The de-growth can be attributed to stalled road construction activities due to containment measures taken resulting in nationwide lockdown during the month. Further, local bitumen consumption is being replaced by concrete roads and imported bitumen which may have affected sales in the early days of the month. Cumulatively, the consumption of bitumen during the year 2019-20 recorded a de-growth of -4.9% as compared to the same period in the previous year. Figure-8 gives the month wise bitumen consumption and growth since April 2018.

Figure-8: Month-wise Bitumen consumption (TMT) and growth (%) since April 2018



1.6 LPG: Total LPG consumption recorded a growth of 1.9% during March 2020 and a cumulative growth of 5.9% during FY 2019-20. Last year during March 2019, a growth of 9.9% was observed and the cumulative growth during 2018-19 was 6.7%. During March 2020, out of the five regions, Northern region had the highest share in total PSU LPG sales of 33.0% followed by Southern region at 26.9%, Western region at 22.1%, Eastern region at 15.6% and North Eastern region at 2.4%.

PSU LPG-Packed Domestic consumption recorded a growth of 5.7% during March 2020 and a cumulative growth of 6.2% during 2019-20. Last year during March 2019, a growth of 10.4% was observed and the cumulative growth during 2018-19 was 6.8%. During 2019-20, 60.4 lakh DBCs and 161.1 lakh new connections were released. Further, around 82.6 lakh beneficiaries were added under PMUY during 2019-20. A total of 801.6 lakh BPL households have been covered under PMUY till 31.3.2020 since inception of the scheme. During March 2020, the region-wise share of LPG Packed Domestic consumption was highest in Northern region (33.9%) followed by Southern region (25.6%), Western region (21.6%), Eastern region (16.4%) and North-Eastern region (2.5%). During March 2020, the five states with the highest LPG-Packed domestic sales share were Uttar Pradesh (14.6%), Maharashtra (11.5%), Tamil Nadu (7.7%), West Bengal (6.9%) and Karnataka (5.9%). During March 2020, percentage share of LPG-Packed Domestic was 91.6% of total LPG consumption whereas it was 88.4% in March 2019.

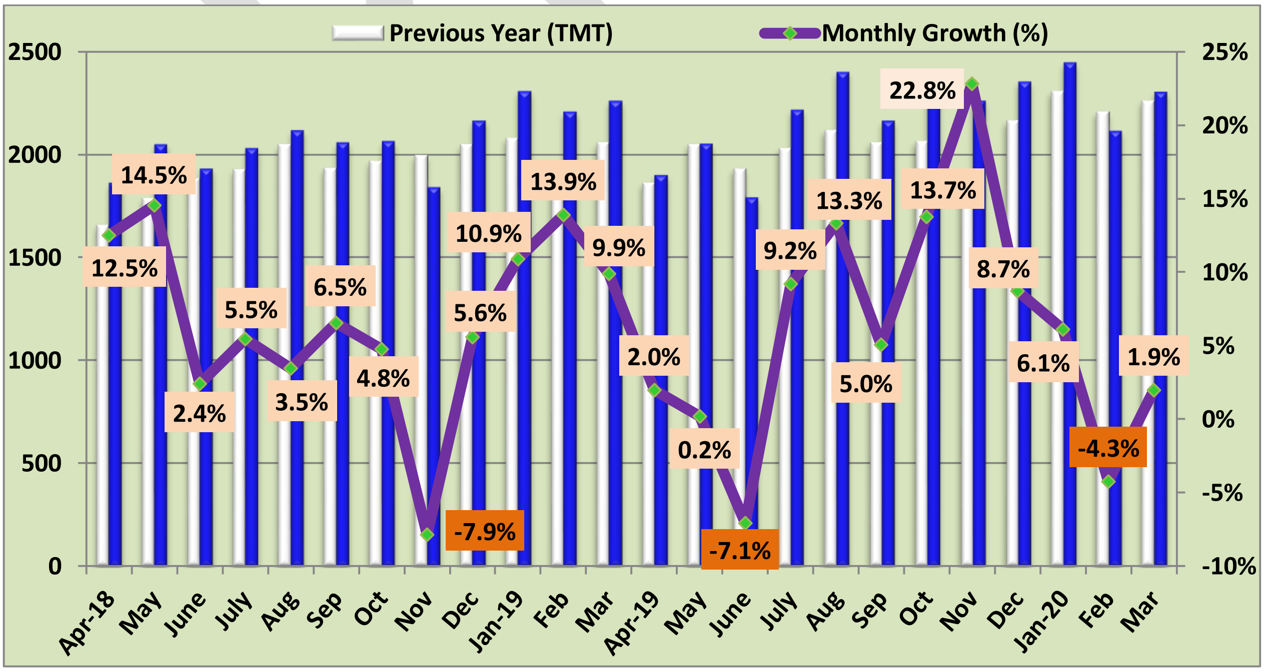
PSU LPG-Packed Non-Domestic consumption recorded a de-growth of 22.7% in March 2020 and a cumulative growth of 10.6% during 2019-20. Last year during March 2019, a growth of 18.8% was observed and the cumulative growth during 2018-19 was 13.2%. Share of LPG Packed Non-Domestic in total PSU LPG Sales has decreased to 7.3% in March 2020 from 9.6% in March 2019. Region-wise share of LPG Packed Non-Domestic consumption was highest in Southern region (38.3%) followed by Western region (28.8%), Northern region (24.3%), Eastern region (7.5%) and North-Eastern region (1.1%) during March 2020.

PSU Bulk LPG consumption registered a de-growth of 46.0% during March 2020 and a cumulative de-growth of 17.2% during 2019-20. Last year in the month of March 2019, there was a de-growth of 10.0% while for the FY 2018-19, a de-growth of 10.5% was witnessed. Percentage share of Bulk LPG in total LPG consumption was 0.7% during March 2020 whereas it was 1.3% in March 2019.

PSU Auto LPG consumption registered a de-growth of 33.5% in March 2020 and a cumulative de-growth of 4.7% during FY 2019-20. The sales volume decrease was about 5.0 TMT in March 2020 as compared to March 2019. Last year in the month of March 2019, a de-growth of -3.7% was observed while there was a cumulative de-growth of -2.2% during FY 2018-19. During March 2020, the percentage share of Auto LPG was 0.4% of total LPG consumption whereas it was 0.7% in March 2019.

Figure-9 gives the month-wise LPG consumption and growth since April 2018.

Figure-9: **Month-wise LPG consumption (TMT) and growth (%) since April 2018**



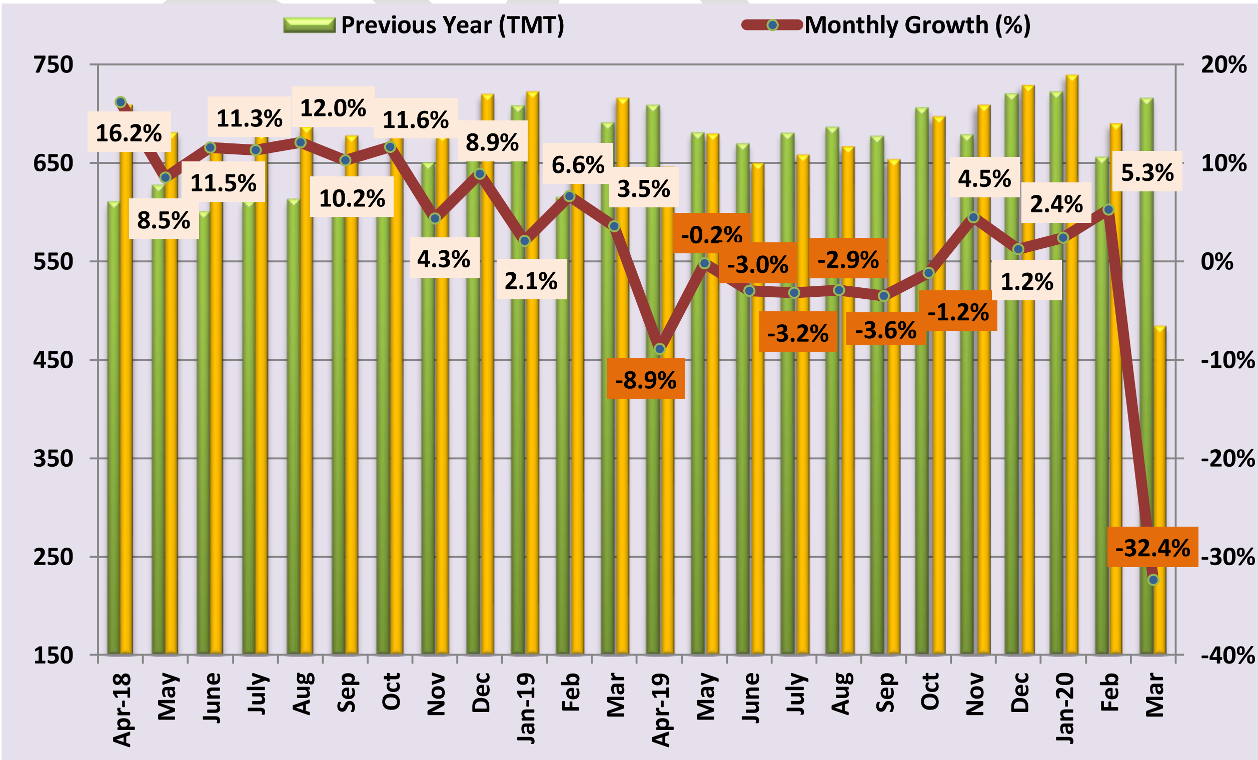
1.7 Naphtha: Naphtha consumption recorded a growth of 15.7% in March 2020 as compared to March 2019. Cumulatively, the consumption of naphtha during the year 2019-20 has seen a growth of 2.2% over 2018-19. There has been a high growth in consumption of naphtha by the petrochemicals sector, with a minor growth in fertilizer and a minor de-growth in other sectors. There has been a considerable growth in naphtha consumption in the petrochemical units. Petrochemical industries remain the main consumers of naphtha in addition to minor consumers like fertilizer and power. Fluctuation in demand by the petrochemical industry (particularly for polymers and plastics) largely drives the pattern of naphtha consumption. On cumulative basis there has been a de-growth in demand of naphtha by fertilizer sector while there is a growth in the petrochemical sector.

1.8 ATF: ATF consumption has shown a de-growth of -32.4% in the month of March 2020. Cumulative growth for the year 2019-20 has seen a de-growth of -3.6% as compared to the same period in the previous year.

The drop in sales during the current March 2020 as Directorate General of Civil Aviation, on March 27 had banned all domestic passenger flights in the country till April 14, which now stands extended to May 3rd, 2020. International operations, too, have come to a standstill due to flying bans imposed by India and many other countries. The aviation sector has witnessed curbs and uncertainty primarily due to halt of all business and recreational travel since beginning of the month and complete lock down of air travel in the later half of the month in order to prevent the spread of corona virus. Domestic and international operations could remain adversely affected for longer than other sectors of transport due to the outbreak of pandemic. The ATF sales had also endured the effect of grounding of Boeing 747 and closure of Jet airlines earlier during the year 2019-20.

Figure-10 gives the month-wise ATF consumption and growth since April 2018.

Figure-10: Month-wise ATF consumption (TMT) and growth (%) since April 2018



1.9 Furnace oil & Low sulphur heavy stock (FO/LSHS): FO/LSHS consumption registered a de-growth of -10.3% during March 2020 as compared to March 2019. On a cumulative basis a de-growth of -7.2% was recorded in the consumption for the year 2019-20 as compared to the same period last year. Consumption of FO/LSHS is largely driven by General trade sector in addition to power, fertilizer, petrochemical, steel and others. All sectors except others and power recorded a de-growth in consumption during the current month. The cumulative de-growth in consumption of FO has been mainly due to ban of FO in Delhi, Uttar Pradesh, Rajasthan and Haryana. Customers have shifted to alternate fuels such as CBFS.

1.10 PETCOKE: Petcoke consumption registered a de-growth of -22.2% in March 2020 as compared to March 2019. The cumulative consumption of petcoke during the year 2019-20 has grown by 1.5% as compared to the same period in the previous year. The consumption of petcoke fluctuates with demand in the cement industry. Directorate General of Foreign Trade (DGFT) under Ministry of Commerce and Industry has banned import of petcoke for use as fuel but has allowed its import only for use as feedstock in some select industries such as cement, lime kiln, calcium carbide and gasification industries.

1.11 LDO: LDO consumption recorded a growth of 5.2% during March 2020 as compared to March 2019. The consumption of LDO during the year 2019-20 has seen a growth of 5.0% as compared to the same period in the previous year. LDO is extensively used in various types of furnaces. Also demand for LDO has increased in power stations in states like Chhattisgarh. The ban of FO in Delhi, Uttar Pradesh, Rajasthan and Haryana has led to an increase in consumption of LDO.

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Industry Consumption Trend Analysis 2019-20 (Provisional)

('000 MT)

Product	March			April-March		
	2018-19	2019-20	Growth (%)	2018-19	2019-20	Growth (%)
(A) Sensitive Products						
LPG	2262.1	2306.2	1.9	24906.8	26366.0	5.9
SKO	291.3	151.9	-47.9	3459.5	2396.8	-30.7
Sub Total	2553	2458	-3.7	28366	28763	1.4
(B) Major Decontrolled Product						
HSD	7459.1	5651.2	-24.2	83528.2	82578.6	-1.1
MS	2577.6	2155.9	-16.4	28284.4	29975.6	6.0
Naphtha	1197.5	1385.6	15.7	14131.2	14436.3	2.2
ATF	715.6	483.9	-32.4	8300.1	8000.3	-3.6
Bitumen	889.8	525.1	-41.0	6707.7	6376.6	-4.9
FO/LSHS	537.7	482.3	-10.3	6563.6	6094.2	-7.2
Lubes+Greases	454.8	296.2	-34.9	3668.0	3639.6	-0.8
LDO	46.4	48.8	5.2	598.0	627.7	5.0
Sub Total	13879	11029	-20.5	151781	151729	0.0
Sub - Total (A) + (B)	16432	13487	-17.9	180148	180492	0.2
(C) Other Minor Decontrolled Products						
Pet.Coke	2160.3	1679.8	-22.2	21345.9	21659.4	1.5
Others*	971.6	916.6	-5.7	11723.2	11534.6	-1.6
Sub Total	3132	2596	-17.1	33069	33194	0.4
Total	19564	16083	-17.8	213217	213686	0.2

*Others include sulfur, propylene, propane, reformat, L.A.B.F.S, CBFS, butane, MTO etc.