



## Industry CONSUMPTION Report-POL & NG, April 2025

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संख्या : डी-12013/02/2025-I  
No. D-12013/02/2025-I

**Subject: Industry Consumption Review Report of PPAC: April 2025**

The monthly Petroleum Industry Consumption Review Report has been prepared by the Petroleum Planning and Analysis Cell (PPAC) for the month of February 2025. The report contains analysis of consumption of POL products and natural gas during the month. The same is enclosed for kind reference.

The Product wise sectoral break-ups are made more fundamental in this edition. This issue of ICR has inputs from Industry Performance Review coordinators & OMC head office officials namely, Sh Subrat Kar and Sh. Surendra Julka-IOCL, Sh. Sanjay Kumar and Sh. Debesh Purohit- HPCL, Sh Anurag Mittal & Sh Sanjeev Gupta – BPCL.

If you have any question on this report, please write to Mr. Pranav P Tulshyan, Asst. Director-Demand & Economics Studies, at [sumit.sharma001@ppac.gov.in](mailto:sumit.sharma001@ppac.gov.in).

धन्यवाद,

Thanking you,

डॉ पंकज शर्मा  
अपर निदेशक (मांग एवं आर्थिक अध्ययन)-प्रभारी  
Dr Pankaj Sharma  
Additional Director (Demand & Economic Studies)-I/c

### Highlights of the month: April 2025

- India's Goods and Services Tax (GST) Revenue for April 2025 stood at Rs. 2,36,716 crores, marking a 20.8% increase from Rs. 2,10,267 crores in April 2024, as indicated by the country's gross and net GST collections data.
- MoPNG Drives Energy Innovation with Strong Presence at Startup Mahakumbh 2025. A total of 32 PSU-backed startups participated in Startup Mahakumbh 2025.
- Meity join hands with Railways to make an indigenous propulsion system of locomotives boosting railway electrification and industry adoption; Uses high power converters & advanced controlling management systems.
- MNRE launches Green Hydrogen Certification scheme. It is an initiative to create a robust framework for certifying green hydrogen (GH) production and ensuring transparency, traceability, and market credibility.
- As a major breakthrough in shipping transport and inland waterway transport, Vice President CSIR and Minister hails India's first indigenously developed hydrogen fuel sea vessel; describes it as a success story emanating from the joint effort of public and private sectors.
- The Noida International Airport in Jewar, Uttar Pradesh, is nearing completion and is expected to begin commercial operations in the first week of June.
- The International Maritime Organization (IMO) has approved draft amendments to MARPOL Annex VI, introducing an updated net-zero framework to cut international shipping emissions to net-zero by 2050.



## SUMMARY OF PRODUCT WISE POL

1. The consumption of petroleum products in April 2025 with a volume of 20.13 MMT registered a de-growth of 0.2% against the historical of 20.16 MMT in April 2024.
2. MS (Petrol) consumption during the month of April 2025 with a volume of 3.45 MMT (1.02 mbpd) recorded a growth of 5.0% on the volume of 3.29 MMT (0.97 mbpd) in April 2024.
3. Ethanol blending in Petrol was 19.7% during April'25 and cumulative ethanol blending during November 2024- Apr'2025 was 18.6%.
4. The Domestic Sale of Passenger Vehicles in April 2025 with a volume of 3.04 lacs registered 5.5% growth over April 2024, as per SIAM with SUV the driver for the growth.
5. HSD (Diesel) consumption during the month of April 2025 with a volume of 8.28 MMT (2.10 mbpd) registered growth of 4.4% over the volume of 7.93 MMT (2.01 mbpd) in the month of April 2024.
6. LPG consumption during the month of April 2025 with a volume of 2.52 MMT registering a growth of 6.2% over the volume of 2.37 MMT in April 2024. LPG has been growing since last year riding on growth in PMUY segment.
7. ATF consumption during April 2025 with a volume of 0.77 MMT continued to register a growth of 3.9%, over a volume of 0.74 MMT during the month of April 2024.
8. Bitumen consumption during April 2025 with a volume of 0.80 MMT registered a de-growth of 4.7% over the volume of 0.84 MMT in the month of April 2024.
9. Kerosene (SKO) consumption with a volume of 0.03 MMT registered a de-growth of 3.7% in April 2025 as compared to April 2024. SKO consumption during the month is largely constituted by PDS category with a 70% share.
10. Total Natural Gas Consumption (including internal consumption) for the month of April 2025 was 5901 MMSCM which was 9.1 % higher than the corresponding month of the previous year.
11. As on 30<sup>th</sup> April 2025, number of active LPG domestic connections are 32.99 cr and PMUY connections 10.33 cr.



This report analyses the trend of consumption of petroleum products in the country during the month of April 2025. Data on product-wise monthly consumption of petroleum products for April 2025 is uploaded on the PPAC website ([www.ppac.gov.in](http://www.ppac.gov.in)) and on the mobile app "PPAC". A small summary of Natural Gas consumption is also provided. Detailed NG production and consumption reports are available at [www.ppac.gov.in](http://www.ppac.gov.in).

The growth percentage in consumption of petroleum products, category-wise, for the month of April 2025 is given in Table-1

**Table-1: Consumption data of Petroleum Products ( M-O-M Comparison and Y-O-Y Comparison)**

POL CONSUMPTION REPORT-April 2025								
Product	April				April-April			
	2024	2025	% share of Apr'25	Growth (%)	2024-25	2025-26	Growth (%)	% share of Apr-Mar'26
<b>(A) Sensitive Products</b>								
LPG	2373	2520	12.5	↑ 6.2	2373	2520	↑ 6.2	12.5
SKO	27	26	0.1	↓ -3.7	27	26	↓ -3.7	0.1
Sub Total	2400	2545	12.6	6.1	2400	2545	6.1	12.6
<b>(B) Major Decontrolled Product</b>								
HSD	7925	8276	41.1	↑ 4.4	7925	8276	↑ 4.4	41.1
MS	3285	3449	17.1	↑ 5.0	3285	3449	↑ 5.0	17.1
Naphtha	1217	932	4.6	↓ -23.4	1217	932	↓ -23.4	4.6
ATF	742	771	3.8	↑ 3.9	742	771	↑ 3.9	3.8
Bitumen	835	796	4.0	↓ -4.7	835	796	↓ -4.7	4.0
FO/LSHS	527	480	2.4	↓ -8.8	527	480	↓ -8.8	2.4
Lubes+Greases	375	323	1.6	↓ -13.8	375	323	↓ -13.8	1.6
LDO	51	86	0.4	↑ 67.8	51	86	↑ 67.8	0.4
Sub Total	14957	15114	75.1	1.0	14957	15114	1.0	75.1
<b>(C) Other Minor Decontrolled Products</b>								
Pet.Coke	1805	1738	8.6	↓ -3.7	1805	1738	↓ -3.7	8.6
Others*	1001	732	3.6	↓ -26.9	1001	732	↓ -26.9	3.6
Sub Total	2806	2470	12.3	-12.0	2806	2470	-12.0	12.3
<b>Total</b>	<b>20163</b>	<b>20129</b>	<b>100</b>	<b>-0.2</b>	<b>20163</b>	<b>20129</b>	<b>-0.2</b>	<b>100</b>
<p>*Others include sulfur, propylene, propane, reformat, L.A.B.F.S, CBFS, butane, MTO etc.</p> <p>NOTE :</p> <p>i) All figures are provisional.</p> <p>ii) The source of information includes Oil Companies, DGCIS &amp; online SEZ data.</p> <p>iii) The consumption estimates represent market demand and is aggregate of :</p> <p>(a) actual sales by oil companies in domestic market.</p> <p>(b) consumption through direct imports by private parties (Private direct imports ) prorated for March'25-April'25, which may undergo change on receipt of actual data), and</p> <p>(c) sales by SEZ units in Domestic Tariff Area (DTA) are provisional due to portal upgrade.</p>								

(Quantity in TMT)

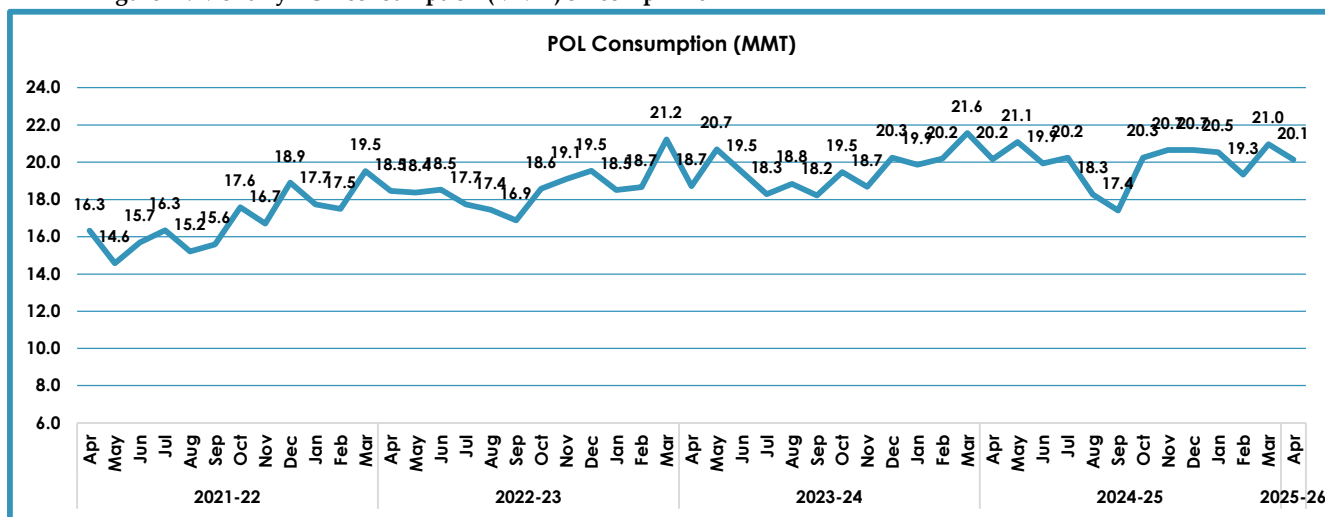
PPAC analyses the sales recorded by the industry and domestic sales by SEZ units based on available data. Data on direct private imports are received from DGCIS, which is added to the final sales reported by oil companies and domestic sales by SEZ units, for estimation of consumption figures. SEZ figures are provisional on account of portal upgradation.

Overall consumption of all petroleum products in April 2025 with a volume of 20.13 MMT de-grew by 0.2% over the volume of 20.16 MMT in April 2024. Growth in the POL was driven by growth in MS at 5.0%, ATF at 3.9%, LPG at 6.2% and HSD at 4.4%.



Pan India based domestic POL monthly consumption trend since April-2021 is shown in Figure-A.

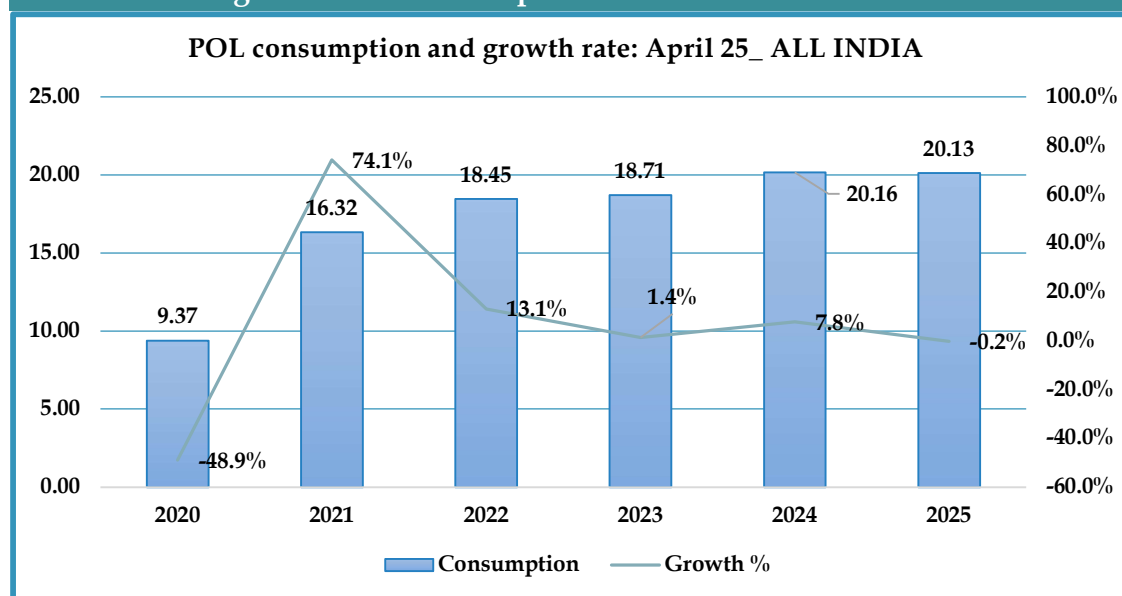
Figure-A: Monthly POL consumption (MMT) since April 2021



✓ The overall POL domestic consumption profile of the April 2025 & its pattern since 2020 with corresponding consecutive YoY growth rates are shown in the Figure-B; it is

found that consumption is growing moderately inspite of high of last year.

Figure-B: POL consumption & Growth rate YoY basis



Source: PPAC Y2 data & OMCs sales

Sales data in TMT

### Petrol/Motor Spirit (MS):

MS (Petrol) consumption during the month of April 2025 with a volume of 3.45 MMT recorded a growth of 5.0% on the volume of 3.29 MMT in April 2024.

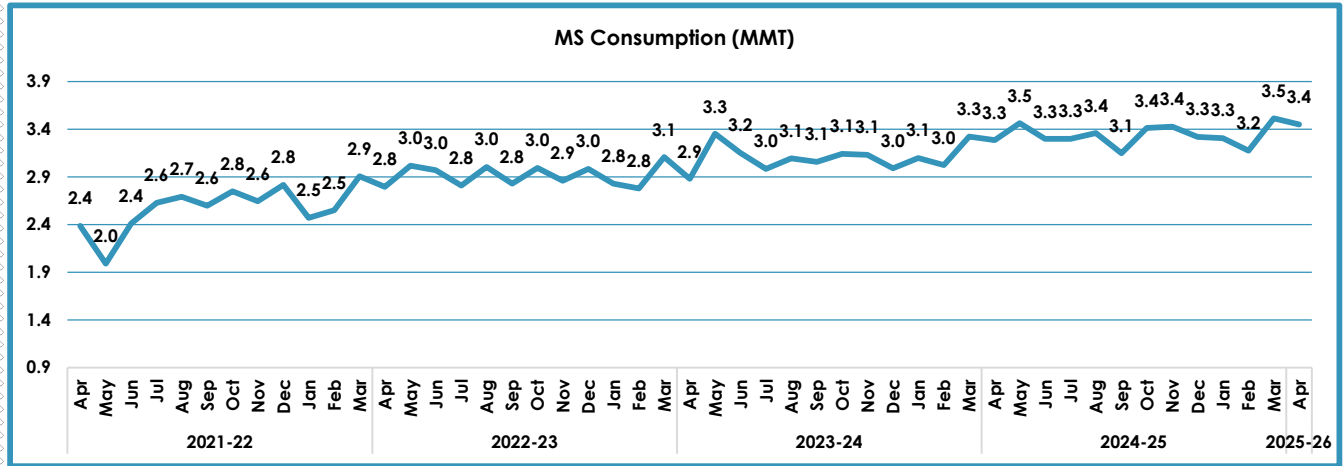
PSU's registered a growth rate of 4.0% as against 15.3% achieved by their private sector counterparts in April-25. Market share held by PSU reduced by 0.90% (89.93% share) with corresponding increase in market share held by Private sector OMC's.

Major factors contributing to MS consumption during the month are as follows:

- The growth in MS is primarily on account of increased vehicle sales, personal mobility and disposable income, tourism (rural growth outpacing the urban growth).
- Additionally, the gradual shift from diesel to petrol vehicles in the 4W SUV category continues to drive growth in MS sales.

Pan India based domestic MS monthly consumption trend since April 2021 is shown in Figure-C

Figure-C: Month wise MS consumption volume (MMT) since April- 2021 to till April-2025



#### Factors impacting consumption of MS:

##### Passenger Vehicle Sales:

The Sale of Passenger Vehicles in April 2025 at 3.04 lacs registered 5.5% growth YoY basis over sale of

2.88 lacs in the month of April 2024. The details of various segmnets of PVs are tabulated below, as shown in the following Table-2.

Table-2: Passenger cars & Utility vehicles sales in the month of April 2025 (Primary sales data)

Vehicle Segment	April'25		
	2024	2025	Growth %age
Passenger Cars	96,357	91,148	-5.4%
Utility Vehicles	179,329	201,062	12.1 %
Vans	12,060	11,438	-5.2%
<b>Total PV</b>	<b>287,746</b>	<b>303,648</b>	<b>5.5%</b>

Source: SIAM (BMW, Mercedes, JLR, Tata Motors and Volvo Auto data not available)

##### Two-Wheeler Sales:

Two-wheeler sales in April 2025 with a volume of 14.59 lacs registered 16.7% de-growth, YoY basis over volume of 17.51 lacs during April 2024, as shown in the following table-3.

YoY basis over the volume of 0.50 lac in April 2024, as shown in the following table-3

##### Three-Wheeler sales

Three-wheeler domestic sales in April 2025 with a volume of 0.49 lac recorded a de-growth of 0.7%,

Table-3: Two & Three Wheelers vehicle sales in the month of April 2025 & YoY comparison (Primary sales data)

Vehicle Segment	April'25		
	2024	2025	Growth %age
Scooters/Scotrette	581,277	548,370	-5.7%
Motor Cycles/Step-Throughs	1,128,192	871,666	-22.7%
Mopeds	41,924	38,748	-7.6%
<b>Total Two Wheelers</b>	<b>1,751,393</b>	<b>1,458,784</b>	<b>-16.7%</b>
Passenger Carrier-3 wheeler	39,383	40,167	2.0%
Goods Carrier-3 wheeler	8,818	8,135	-7.7%
E-Rickshaw	1,308	830	-36.5%
E-cart	265	309	16.6%
<b>Total Three Wheelers</b>	<b>49,774</b>	<b>49,441</b>	<b>-0.7%</b>

Source: SIAM

### High Speed Diesel (HSD):

HSD (Diesel) consumption during the month of April 2025 with a volume of 8.28 MMT, registered a growth of 4.4% on the volume of 7.93 MMT in the month of April 2024.

- PSU's registered a 3.3% growth their private sector counterparts in the month of April-25.
- Market share held by PSU reduced by 1.0% (87.79% share) with corresponding increase in market share held by Private sector OMC's.

Major factors contributing to HSD consumption during the month are as follows:

- The month accounted for the Rabi harvest with 92.19% of the sown area harvested coupled with a 15.4% YoY increase in summer crop sowing, supported growth from the agriculture segment.

*Pan India based domestic HSD monthly consumption since Apr-21 is shown in the Fig-D. HSD market share in direct and retail sales is shown in the Fig-E.*

Figure-D: Month-wise HSD consumption (MMT) since April 2021

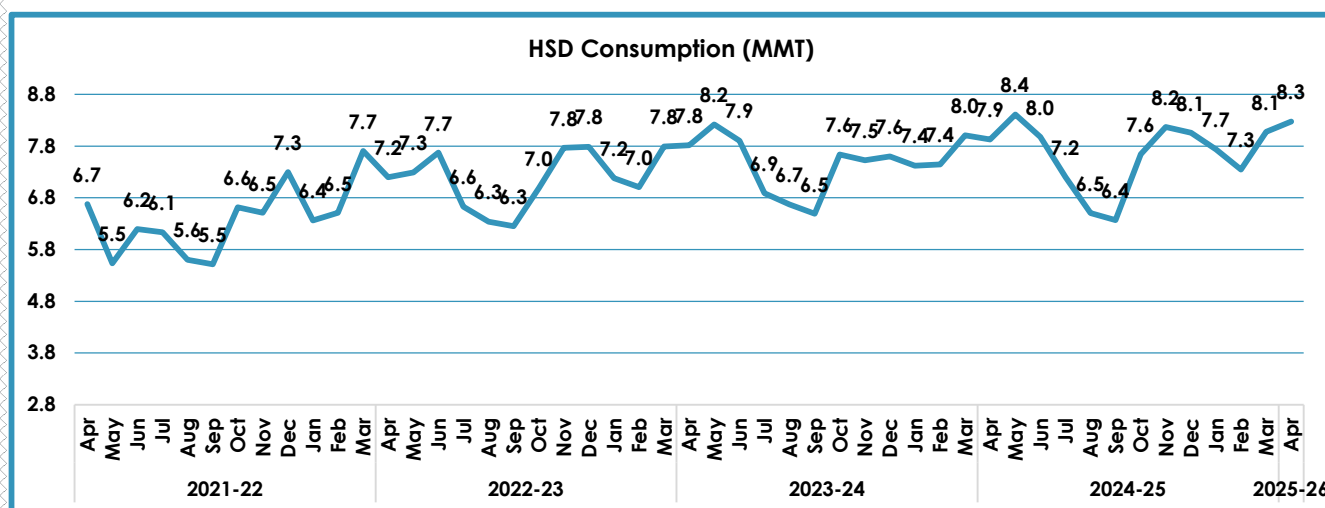
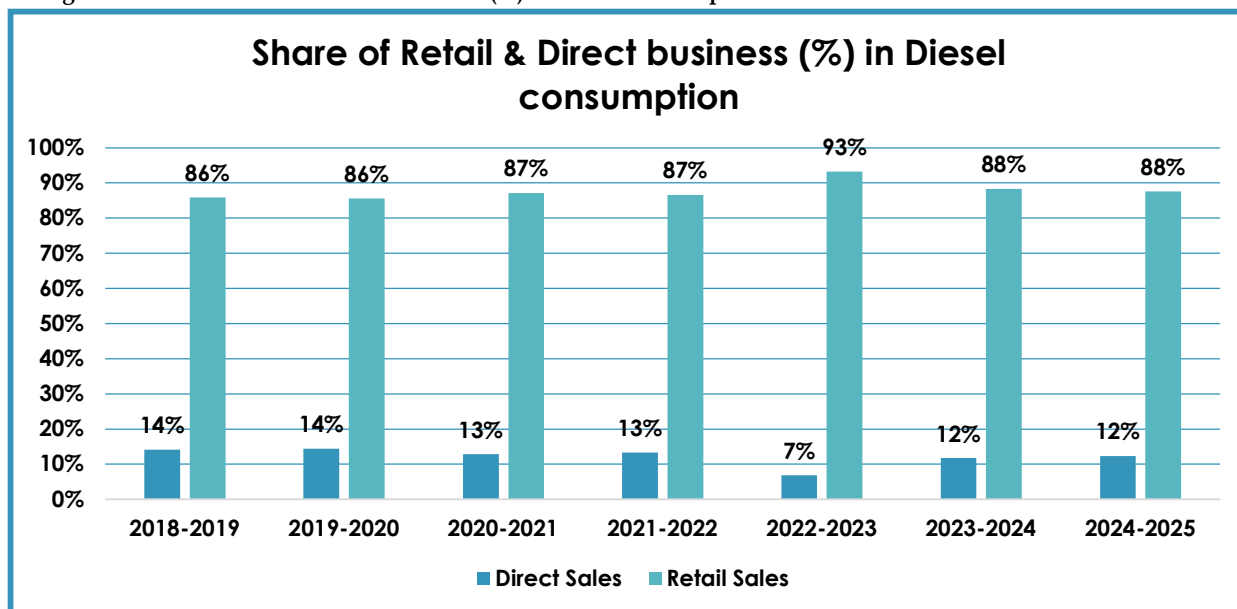


Figure-E: Share of Retail & Direct business (%) in Diesel consumption



## Factors impacting consumption of HSD:

### Weather

Delhi, Punjab, Haryana, and Uttar Pradesh saw above-normal heat, with temperatures often exceeding 38°C. Clear skies helped visibility, but rising temperatures stressed late winter crops.

Jammu & Kashmir, Himachal Pradesh, and Uttarakhand had early snowmelt and unusually warm weather. Minimal snowfall reduced meltwater reserves, impacting future water supply.

Madhya Pradesh and Chhattisgarh faced intense heatwaves (42–45°C), with little to no rainfall. Dry soils, crop stress, and forest fire risks increased.

Rajasthan and Gujarat experienced extreme heat and dry conditions, with parts of Rajasthan touching 46°C. Eastern Rajasthan was marginally cooler; no pre-monsoon relief observed.

Bihar, Jharkhand, West Bengal, and Odisha saw humid heat with intermittent thunderstorms. Rain brought brief relief, but muggy conditions prevailed, especially in urban areas.

Tamil Nadu, Kerala, Karnataka, and Telangana remained hot and humid. Temperatures ranged between 35–40°C, with dry skies and increased crop water demand.

April 2025 was marked by widespread heat, minimal rainfall, and early summer onset across India. Most regions reported above-average temperatures, with Central and Western India facing the brunt of extreme conditions. Snow-deficit mountains and dry agricultural belts raised concerns over water resources and crop sustainability.



Figure- F: Sub-Division Rainfall Map for April 25 vs April 24. (Sourcew : Indian Metreological Department)

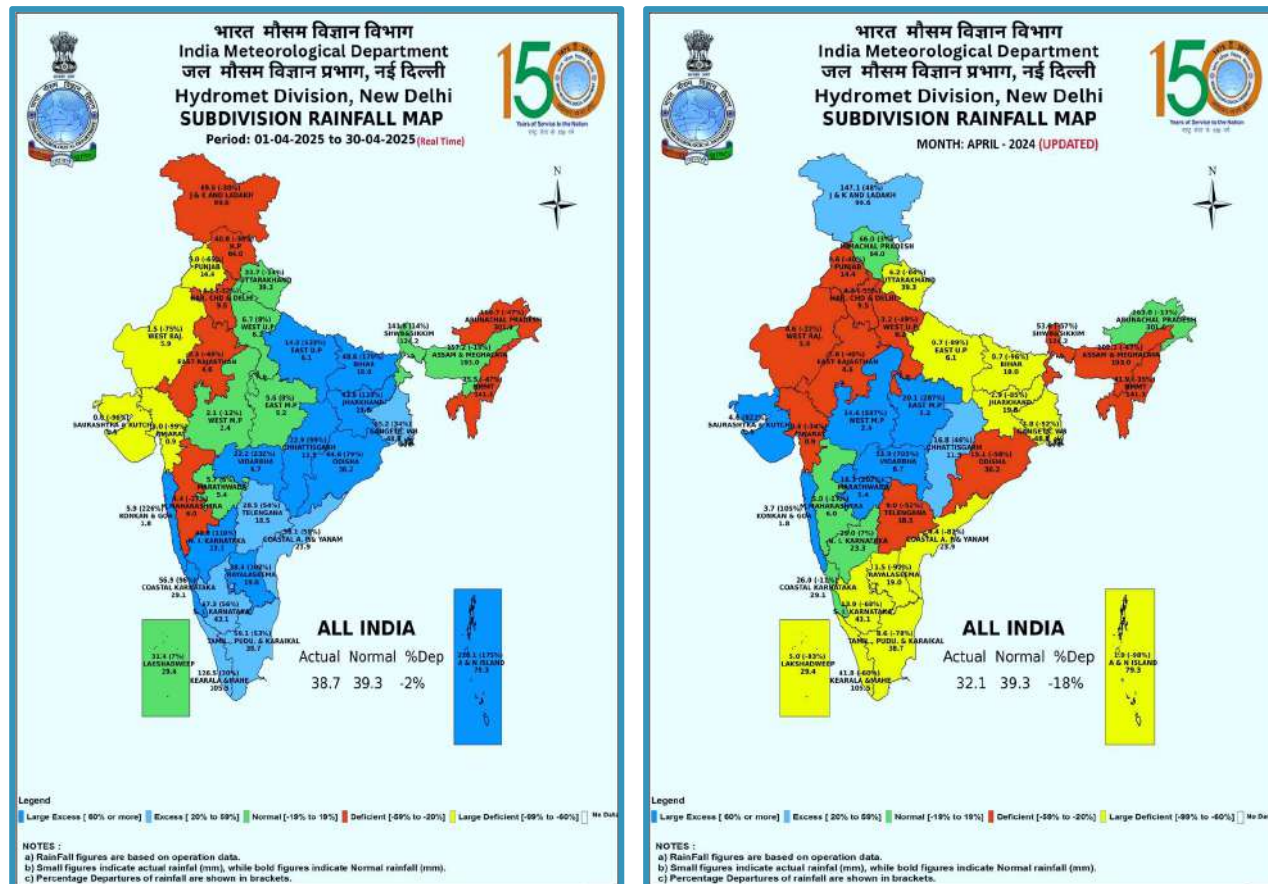


Table-4 Details of the Total E-Way Generated in CY vis-a-vis LY :

Month	April-25	April-24	Variance
Intra State	770.18	626.45	23%
Inter State	422.48	340.09	24%
Total	1,192.66	966.54	23%

Source: GSTN Portal

#### E-Way Bill

The electronic bill is mandatory document for transportation of goods of value higher than Rs 50,000. This Electronic document is used to track goods being moved around between cities and states. Economic activity driven by domestic trade is reflected from e-way bill generation. The number of E-way bills reflect quantum of transport activities directly influencing Diesel sales.

#### Commercial Vehicle

Based on data from FADA Research, Indian domestic sales of commercial vehicles registered a de-growth of 1.0% as compared to April 2024 as shown in Table-4.

#### Tractor Sale:

Tractor domestic sales in April 2025 with a volume of 60,915 registered a growth of 7.6% over the volume of 56,635 in April 2024.



Table-5: Domestic commercial vehicles & tractors sales with YoY comparison (Secondary sales data)

Commercial vehicles & tractors		April'25		
		2024	2025	Growth %age
CV	LCV	47,267	46,751	-1.1%
	MCV	6,776	7,638	12.7%
	HCV	32,590	31,657	-2.9%
	Others	4,883	4,512	-7.6%
Total CVs		91,516	90,558	-1.0%
Tractors		56,635	60,915	7.6%

Source: FADA research

#### Port Traffic:

The Major Ports achieved cargo throughput of 71.98 MMT during April 2025 which is 7.02% higher over same Period last year.

Table-6: Cargo handled at major ports in April 2025 (Qty in TMT) Source: ipa.nic.in

Ports	April'25	April'24	Growth (%)
Kolkata & Haldia	5967	4106	45.32
Paradip	12601	12304	2.41
Visakhapatnam	6711	6370	5.35
Kamarajar (Ennore)	3710	3910	-5.12
Chennai	4737	4357	8.72
V.O. Chidambaranar	3434	3431	0.09
Cochin	3032	2762	9.78
New Mangalore	3546	3251	9.07
Mormugao	1484	1569	-5.42
Mumbai	5490	6295	-12.79
JNPA	8436	7161	17.80
Deendayal	12829	11740	9.28
Total:	71977	67256	7.02

#### POWER SITUATION:

In April 2025, India's peak power demand reached 235.19 GW, a 2.2% increase from the previous year. This increase in demand was accompanied by a 2.2% rise in overall power consumption, reaching 147.48 billion units (BU).

These figures indicate a growing demand for electricity in India, likely influenced by factors like rising temperatures and increased industrial activity.

Table-7: Power availability vs requirement for current & previous period (upto April 2025)

Year	Energy				Peak			
	Requirement	Availability	Surplus(+)/Deficits(-)		Peak Demand	Peak Met	Surplus(+) / Deficits(-)	
	(MU)	(MU)	(MU)	(%)	(MW)	(MW)	(MW)	(%)
2021-22	117,496	117,080	-416	-0.4%	183,037	182,379	-658	-0.4%
2022-23	134,781	132,082	-2,699	-2.0%	215,888	207,231	-8,657	-4.0%
2023-24	130,414	130,082	-332	-0.3%	216,142	215,972	-170	-0.1%
2024-25	144,403	144,280	-123	-0.1%	224,181	224,052	-129	-0.1%
2025-26	147,421	147,289	-132	-0.1%	235,190	235,190	0	0.0%

## SECTORAL CONSUMPTION OF HSD:

During 'April-25, HSD total consumption with a volume of 8.28 MMT registered 4.4% growth Year-on Year basis over the volume of 7.93 MMT in 'April-24.

88% of HSD consumption during 'April-25', was constituted by retail sales. Balance 12% falls under direct sales category as shown in G(I/II) figure. The bifurcation was 88:12 in 'April-24' also after direct sales volume recovering back.

Growth of 4.4% during Apr-'25 was driven by increased economic activity & freight movement, evident by a 23% jump in Inter-State E-way bill statistics.

In direct sales category, the sectoral consumption break up is shown in G(II) figure. i.e., for April-25 'Road Transport' was 18%, the highest share followed by Mining 13%, Manufacturing at 12%, Shipping 7%, Agriculture 3% and Power Generation 2%. Railways share dropped from 12% to 9%. Retail sales continue to cater to mostly the road transport.

Also share of Road transport & shipping reduced by 21% & 18% respectively.

Details comparisons & YoY analysis are pictorially presented in the following figures.

Figure-G(I): Sector-wise HSD consumption in April-25 and its comparison with April-24

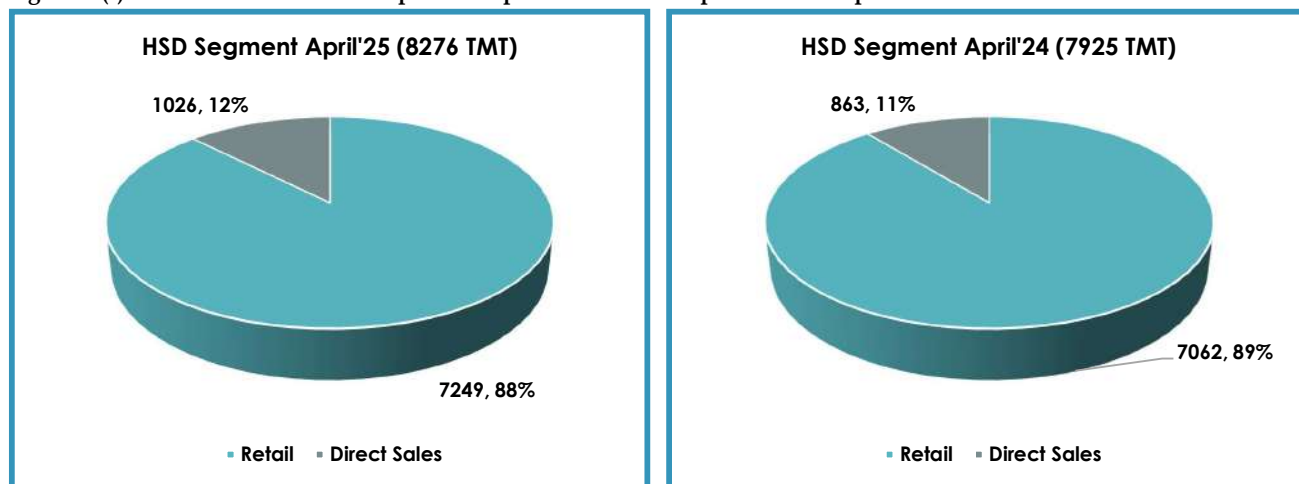
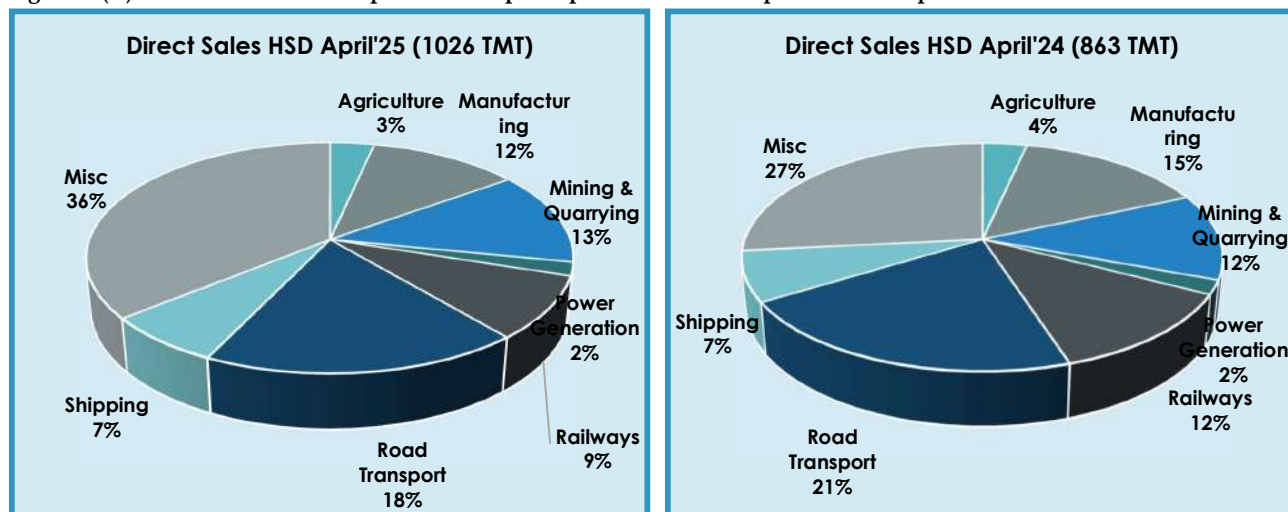


Figure-G(II): Sectoral HSD consumption Breakup in April-25 and its comparison with April-24



Share of Manufacturing has reduced from 15% owing to weaker demand from the Cement & Metal industry in the Direct Sales segment. Share of Mining sector increased to 13%. Misc includes Cement Industry, Iron & Steel, Civil Engg, Chemicals & Allied, mechanical, Aluminium, Elec/Electronics, Fertilizers, Textiles, Ceramic & glass & other Misc Consumer/Industrials goods.

### Kerosene:

Kerosene (SKO) consumption with a volume of 0.03 MMT registered a de-growth of 3.7% in April 2025 as compared to April 2024. SKO consumption during the month is largely constituted by PDS category

There are twelve states/UTs who have voluntarily surrendered the PDS kerosene quota as on date namely, except the UT of J&K, Ladakh and Lakshadweep, all UTs and the states of Andhra

Pradesh, Delhi, Haryana, Punjab, Uttar Pradesh, Rajasthan, Gujarat and Goa. UTs of J&K, Ladakh and Lakshadweep alongwith States of Telangana & Uttarakhand have nil allocation this financial year.

The market share of subsidized-PDS and other SKO was 70% & 30% respectively for the month April 2025 as shown in the following figure-H.

Figure-H: Month-wise PDS & other-SKO consumption in share (%) since April 2021 to till date

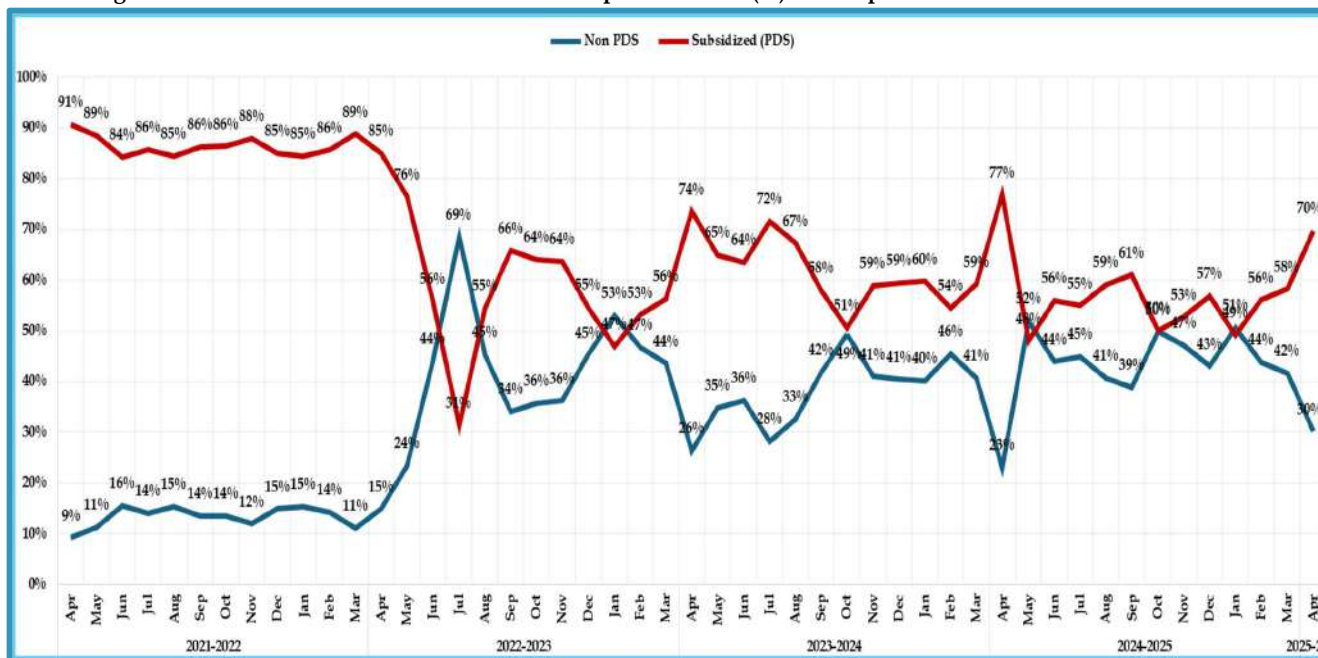
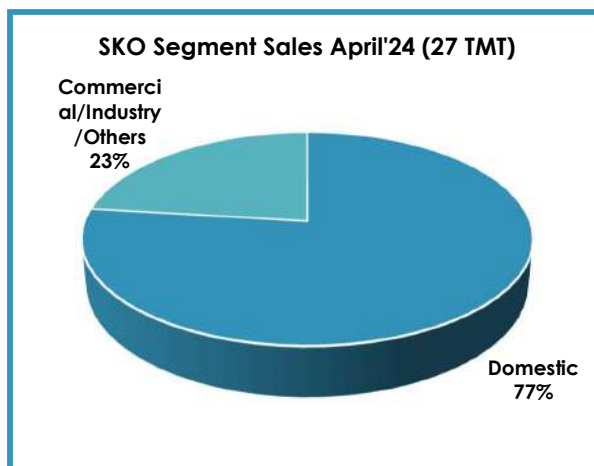
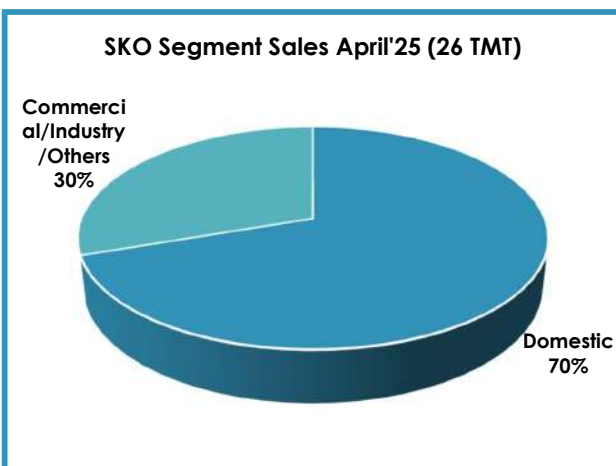


Figure-I: \*Other SKO: non-subsidized PDS SKO +non-PDS kerosene



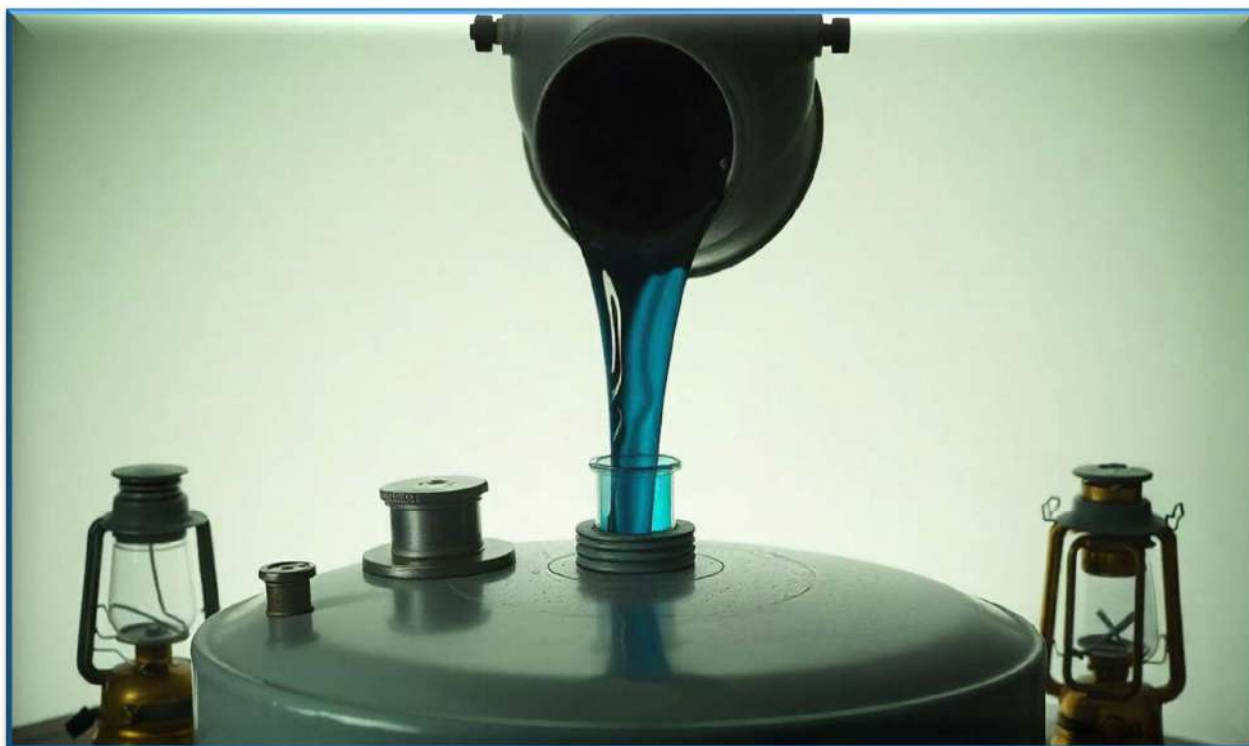
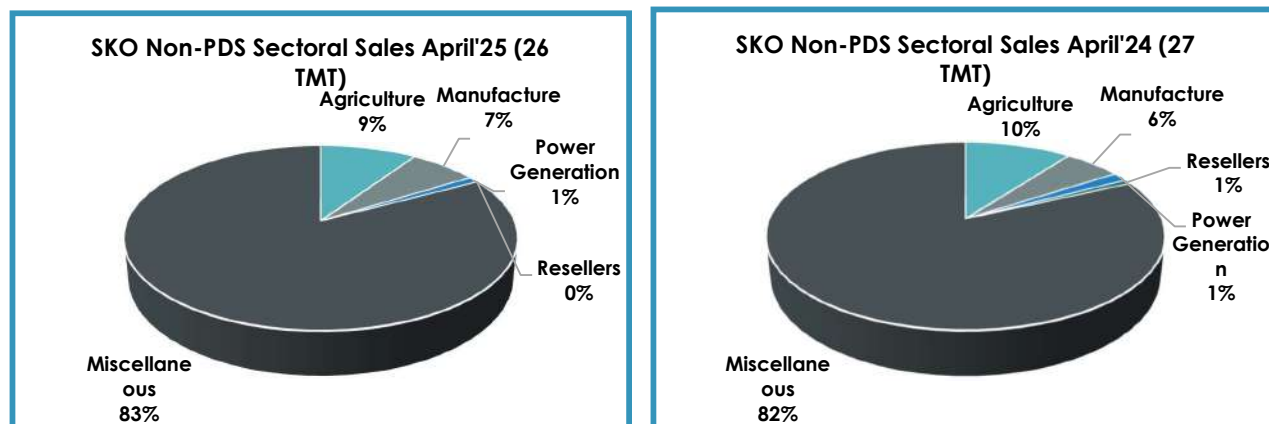
### Sectoral consumption of SKO:

Out of total SKO sales during 'April-25' 'PDS subsidized SKO' upliftment constituted to 70%. So far as sales in 'Other SKO' is concerned, agriculture accounted for 9% share, Manufacturing 7%, and Miscellaneous applications at 83%.

Detailed Y-o-Y comparisons are pictorially presented in the next figure.

Figure: Cumulative 'PDS subsidized SKO' & 'Other SKO' sales breakup and Sectoral bifurcation of 'Other

Figure-J: SKO' sales during 'April-25 and its YoY comparison with 'April-24



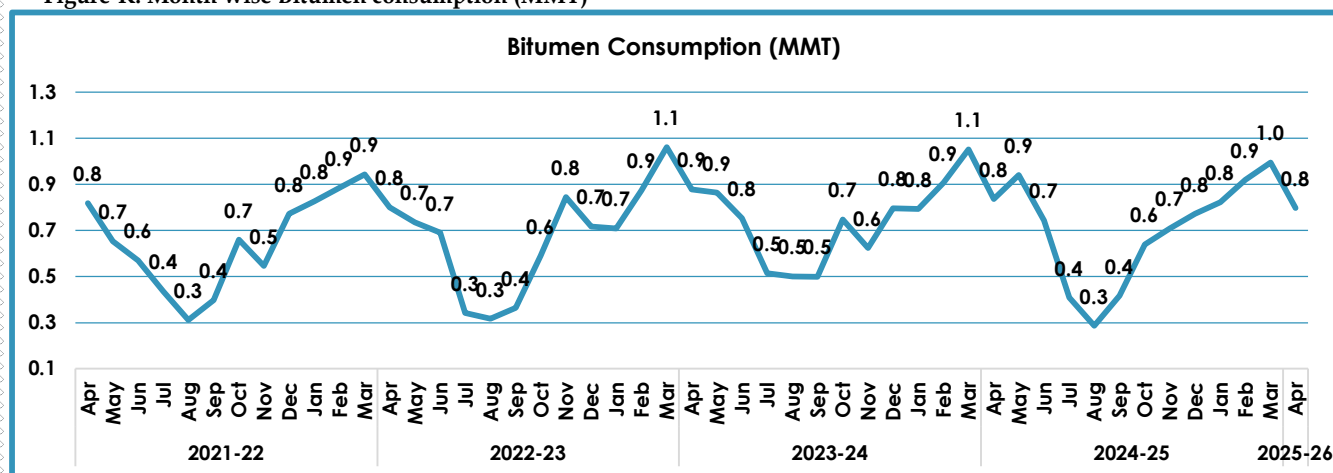
#### **BITUMEN:**

Bitumen consumption during April 2025 with a volume of 0.80 MMT registered de-growth of 4.7% over the volume of 0.84 MMT in the month of April 2024.

Improved availability & conducive climate for road construction and support from state government projects, particularly in Western & Eastern India, have resulted in growth in bitumen. De-growth registered in Rajasthan & Punjab due to state specific reasons.

*Pan India based domestic Bitumen monthly consumption since April-21 is shown in the Fig-K.*

Figure-K: Month-wise Bitumen consumption (MMT)



### Sectoral consumption of Bitumen:

During 'April-25, total bitumen consumption with a volume of 0.80 MMT registered a de-growth of 4.7% Year-on Year basis over the volume of 0.84 MMT in 'April-24-FY2024-25'.

98% of cumulative bitumen sales during 'April-25-FY2025-26', was constituted to Road construction, balance 2% was consumed by miscellaneous industrie.

### LPG:

LPG consumption during the month of April 2025 with a volume of 2.52 MMT registered growth in the month at 6.2% over the volume of 2.37 MMT in the month of April 2024. LPG consumption during the month continues to be largely driven by higher consumption in PMUY domestic packed with a share of 85.5%.

Domestic LPG is supplied in 14.2 kg and 5 kg cylinders to domestic consumers for use as kitchen fuel. Packed Non-Domestic LPG is sold to commercial or industrial consumers in cylinders having water capacity less than 1000 liter. Bulk LPG is primarily sold to Industries in large containers with water capacity greater than 1000 liter for industrial applications. Auto LPG is an automotive fuel used by three and four-wheeler vehicles.

The PMUY sales, subsidized prices & extension of State specific schemes in domestic LPG contributed to growth rate in LPG consumption.

1. 5.4% growth in Packed domestic LPG consumption in Apr'25 as compared to Apr'24.
2. 6.8% growth in Non-Domestic packed after a long period.
3. Under PMUY scheme 10.33 crores beneficiaries at the end of April 2025.
4. As on 1.05.2025, total active domestic connections in India are 3299.3 lakhs

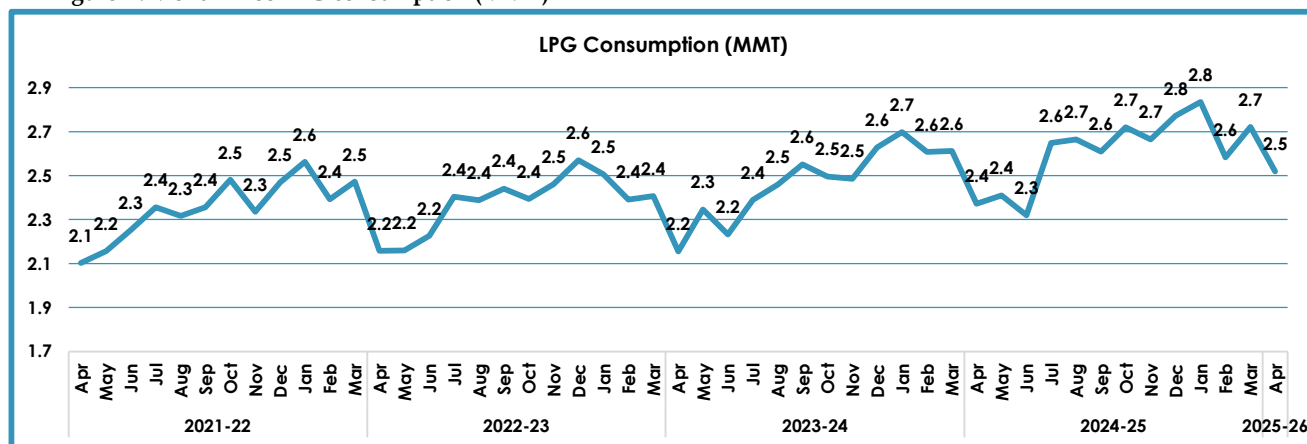
growth in consumption of domestic LPG in April'25 compared to April'24 are as follows:

- Higher cost of non-subsidized refill per 14.2 kg cyl. Price is Rs.853 in Apr'25 as compared to Rs. 803 in Apr'24.
  - PMUY cylinder available at Rs.553.00 in April'25 as compared to Rs.503.00 in April'24.
  - As of now, more than ~65.4% of non-PMUY consumers have DBCs connections and thus making a positive impact on LPG consumption. New connections ~83.1% issued with DBCs in Apr'25 (including SBC to DBC conversion).
5. 15.7 Crs cylinders of 14.2kg (~50.6 lacs/day) were delivered in April'25 compared to 14.9 Crs in April'24.
  6. Growth of 60.5% in Bulk LPG consumption due to price advantage in switching of fuels. Insite of minor changes in price of bulk LPG in Apr'25 Rs. 77.6/kg as compared to last month Mar'25 rate was Rs. 77.8/kg. Major customers in Ceramic industry has shifted from Gas to LPG.

- Pan India based domestic LPG monthly consumption is shown in the Fig-L.



Figure-L: Month-wise LPG consumption (MMT)

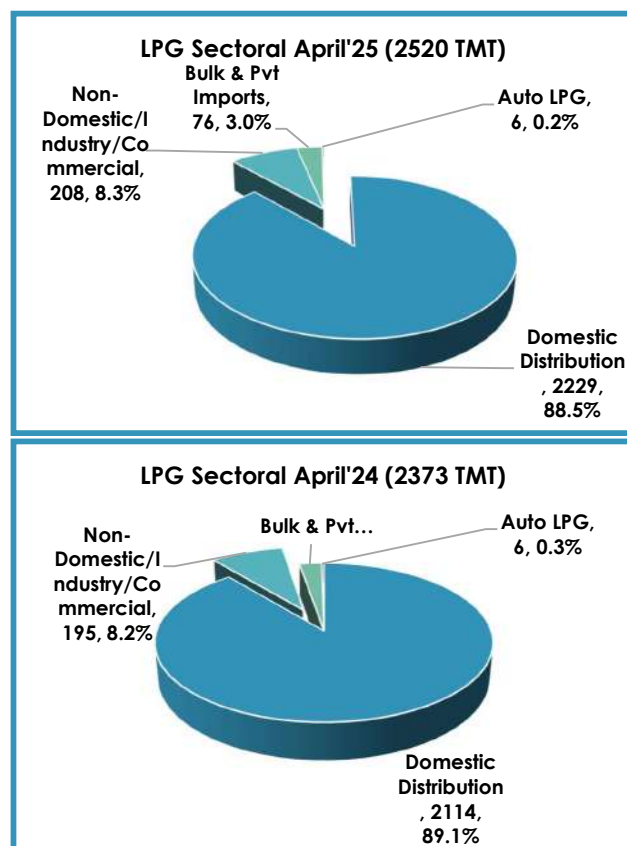


### Sectoral consumption of LPG:

During 'April-25, total LPG domestic consumption with a volume of 2.52 MMT registered 6.2% growth Year-on Year basis over the volume of 2.37 MMT in 'April-24.

The Sectoral LPG consumption during 'April-25', was driven by Domestic packed at 88.5%, followed by LPG 'non-domestic/ industry/ commercial sector 8.3% & Bulk at 3.0%. Auto LPG at 0.2% has been on the negative trajectory getting displaced by CNG.

Figure-M: Sector wise LPG consumption of April-25-FY2025-26 (P) and its comparison with 'April-24



### Naphtha:

Naphtha consumption during April 2025 with a volume of 0.93 MMT registered a de-growth of 23.4%, over a volume of 1.22 MMT during the month of April 2024.

### Sectoral consumption of Naphtha:

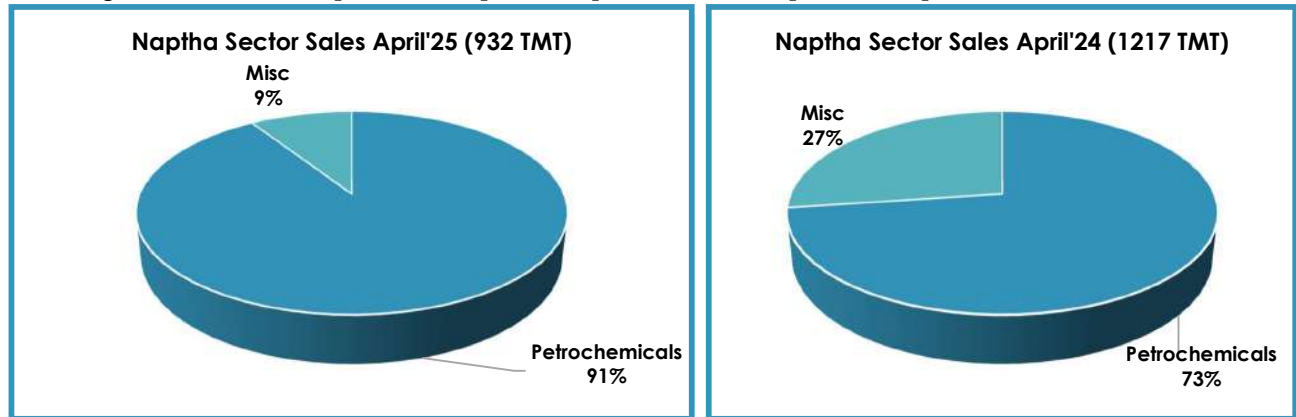
During 'April-25, total Naphtha domestic consumption with a volume of 0.93 MMT registered de-growth of 23.4% Year-on Year basis over the volume of 1.22 MMT in 'April-24.

Petrochemical industries remain the main consumers of naphtha. Naphtha consumption showed a de-growth during the month with reduced consumption in Petchem plants, due to the geopolitical situation between US & China and also lower Gas prices.

Consumption of naphtha during this period was driven by petrochemicals sector 91%.

On YoY basis, detailed comparisons are pictorially presented in the following figure.

Figure-N: Sector wise naphtha consumption of 'April-25 and its comparison to 'April-24



### ATF:

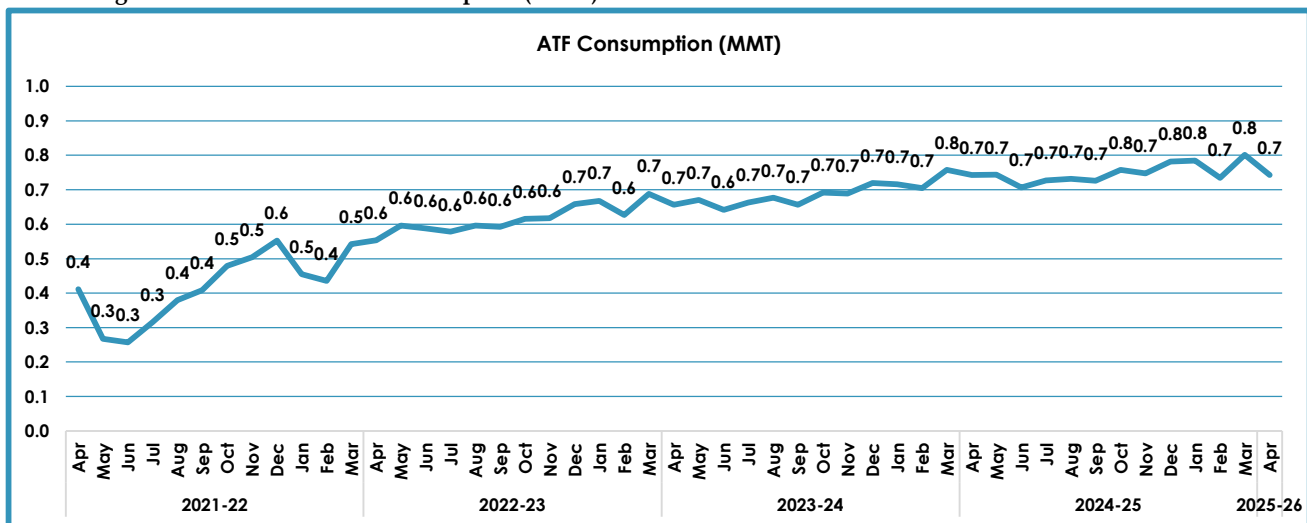
ATF consumption during April 2025 with a volume of 0.77 MMT continued to registered a growth of 3.9%, over a volume of 0.74 MMT during the month of April 2024.

ATF continues to grow, driven by a sustained rise in aircraft movements, as the year-end holiday season significantly boosted both international and

domestic travel. Higher base effect on account of elections in the previous year led to subdued growth in the current year. Growth in international travel remains higher than the growth in the domestic sector, as noted in table-8A & 8B hereinunder.

Pan India based domestic ATF monthly consumption is given in following figure-O.

Figure-O: Month-wise ATF consumption (MMT)

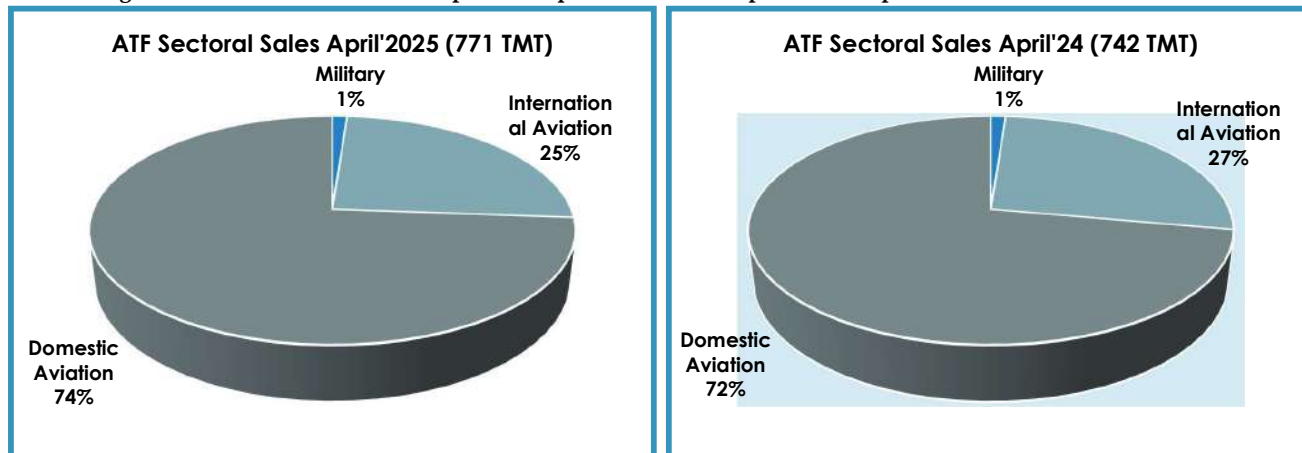


### Sectoral consumption of ATF:

During 'April-25, total ATF domestic consumption with a volume of 0.77 MMT registered 3.9% growth Year-on Year basis over the volume of 0.74 MMT in 'April-24.

Almost entire ATF consumption during 'April-25 was attributed to aviation; 74% domestic aviation, 25% international aviation & 1% Military aviation. Details comparisons and YoY analysis are pictorially presented in the following figures.

Figure-P: Sector wise ATF consumption of April-25 and its comparison to 'April-24



**Note :** The above sectorisation is not basis tax applicability and is as provided by OMCs

The below table reveals that the total aircraft movements have increased by around 9%. The International aircraft movements, domestic aircraft movements and total aircraft movements have increased by 9.4%, 7.6% and 8% respectively during (April-March) 2024-25 as compared to (April- March) 2023-24.

The table below encapsulates details pertaining to aircraft movements during Apr-Mar'25 in the country:

Table 8A: Details pertaining to aircraft movements during Apr-Mar'25 in the country

CATEGORY	April to March		%
	2024-25	2023-24	CHANGE
Aircraft Movements (in '000)			
International	465.12	425.17	9.4
Domestic	2421.93	2252.42	7.6
Total	2887.05	2677.59	8
General Aviation	282.39	234.55	20.6
Grand Total(INTL+DOM+Gen)	3169.44	2912.14	8.8

**Table 8B: Region's wise trends in air traffic vis-à-vis ATF Consumption recorded at PPAC**

The region wise trends in air traffic vis-à-vis ATF Consumption recorded at PPAC has been tabulated below:

REGION WISE TRENDS IN AIR TRAFFIC vis-à-vis ATF Consumption									
April-March 2024-2025									
REGION				REGION					
	April to March		Change		April to March		Change		Difference
	2024-2025	2023-2024			2024-2025	2023-2024			
AIRCRAFT MOVEMENTS ( IN NOS)				ATF CONSUMPTION (IN TMT)					
EASTERN	290172	269563	7.7%	EASTERN	574	546	5.1%	2.6%	
NORTH EAST	95093	102547	-7.3%	NORTH EAST	180	174	3.2%	-10.5%	
NORTHERN	652645	599070	8.9%	NORTHERN	3286	2935	12.0%	-3.1%	
SOUTHERN	742208	674407	10.1%	SOUTHERN	2689	2435	10.4%	-0.3%	
WESTERN	641816	606834	5.8%	WESTERN	2254	2156	4.6%	1.2%	
Total	2421934	2252421	7.5%	Total	8982	8245	9.8%	-2.3%	

The region wise ATF consumption in the country however varies owing to the difference in applicable VAT in the various states across the nation.

#### Furnace oil & Low sulphur heavy stock (FO/LSHS):

FO/LSHS consumption during April 2025 with a volume of 0.480 MMT with a de-growth of 8.8% over the volume of 0.527 MMT in April-2024.

The consumption is reducing on account of shift to lower emission fuels Natural gas etc due to increased availability with wider availability of gas coupled with banning of GO in various parts of the

country including NCR States. Some companies shifted their internal fueling consumption from FO to CNG due to environmental obligations.

Some factors attributing FO/LSHS consumption pattern are listed here:-

- The sectors of Iron & steel sector showed degrowth during the month.
- The Shipping sector was the sector having the highest share.

#### Sectoral consumption of FO/LSHS:

During 'April-25, total FO/LSHS consumption with a volume of 0.48 MMT with a de-growth of

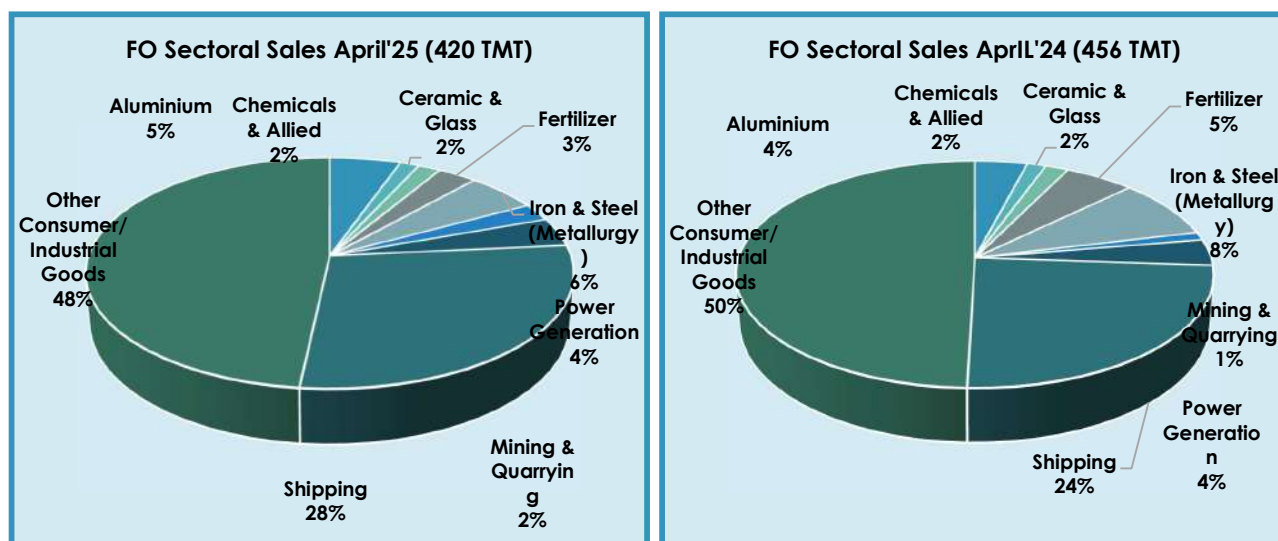
Further Product wise consumption for FO Apr '25 was 0.42 MMT vs 0.46 MMT in Apr'24 (8.0% de-growth). For LSHS, Apr-25 was 0.06 TMT vs 0.07 TMT in Apr-24 (14.2 % De-growth)

8.8% Year-on Year basis over the volume of 0.53 MMT in 'April-24.

Details YoY comparisons are pictorially presented in the following figure.



Figure-Q: Sector wise FO+LSHS consumption of 'April-25 and its comparison to 'April-24



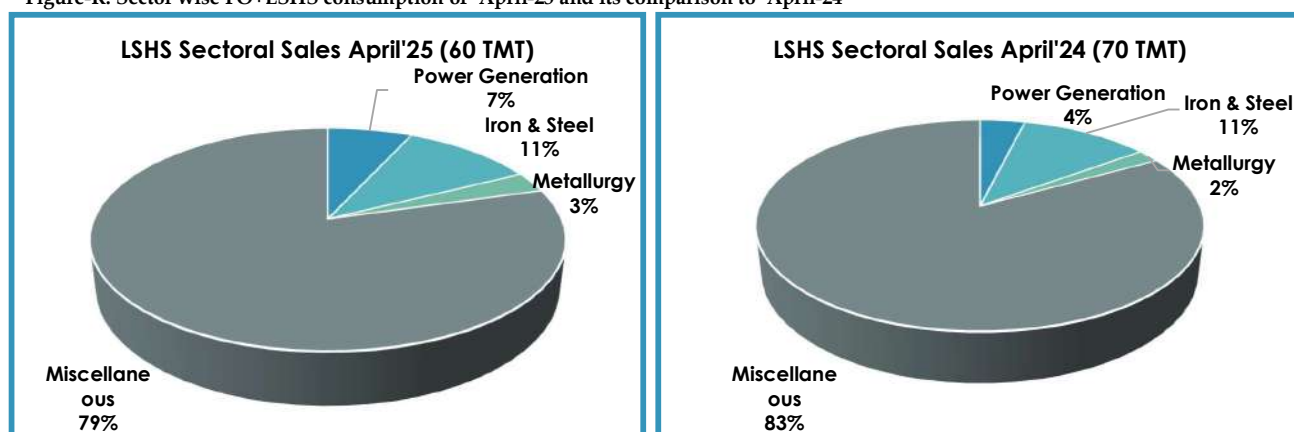
Apr-25:-

Shipping sector has a share of 28%, up from 24% from previous period, followed by Iron & steel, fertilizer and Aluminium.

Apr-24:-

Shipping contributes the highest share with 24% followed by Iron & Steel, Aluminium, Glass, Fertilizer & Power generation.

Figure-R: Sector wise FO+LSHS consumption of 'April-25 and its comparison to 'April-24



April-25:-

Iron & Steel sector contributed to be the largest sector followed with 11% by Power Generation 5%

April-24:-

Iron & steel contributes the highest share with 11% followed by Power generation & Metallurgy

### Petcoke:

Petcoke consumption during the month of April 2025 with a volume of 1.74 MMT with a de-growth 3.7% over the volume of 1.81 MMT same period last year.

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.

Various factors attributing to Petcoke consumption trend are listed here:-

- Cement industry is the major sector consuming petcoke and de-growth is noted on account of de-growth in the sector.
- Few Small scale industries like Iron & steel etc use petcoke as a fuel, as also gasified for synthetic gas production.
- Petcoke gasifiers installed in the refinery consumes the petcoke produced in the processes.



## Sectoral consumption of Petcoke:

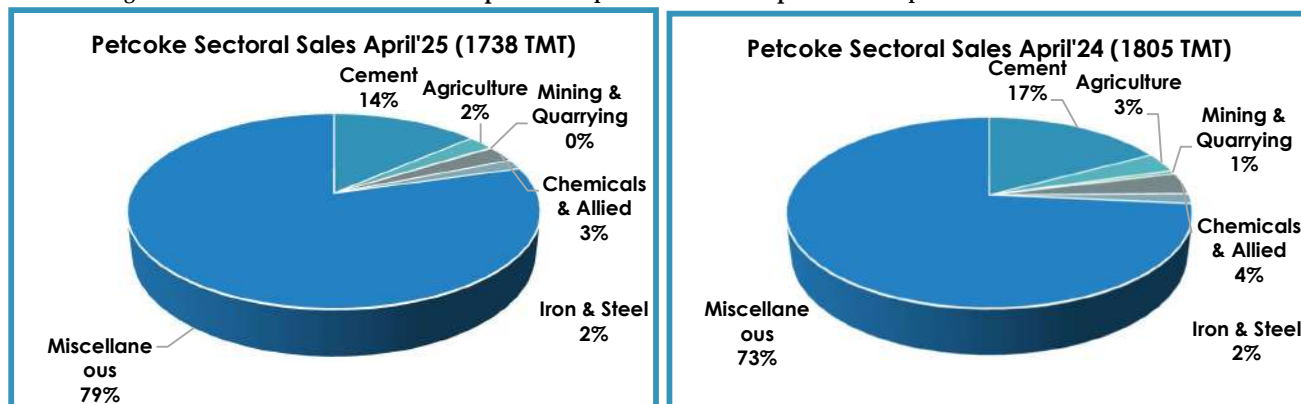
During 'April-25', total petcoke cumulative domestic consumption with a volume of 1.74 MMT

registered 3.7% de-growth Year-on Year basis over the volume of 1.81 MMT in 'April-24'.

The cement sector continues to occupy the largest share in 'April-25-' (P) at 14% followed by other Industries.

On YoY basis, sectoral consumption for April-25 is shown in the following figures:-

Figure-S: Sector wise Petcoke consumption of 'April-25 and its comparison to 'April-24



Apr- 25:-

Cement industry occupied the highest share at 14%, followed by other sectors, down from 18% during last year.

Apr-24:-

Cement industry occupied the highest share at 17%, followed by other sectors.

## Light Diesel Oil:

LDO consumption during the month April 2025 with a volume of 0.086 MMT registered a 67.8% growth over the volume of 0.051 MMT in April 2024.

April 2025 LDO consumption growth was attributed to following reasons:-

LDO consumption in the power sector is primarily associated with initial light-ups of the power plants.

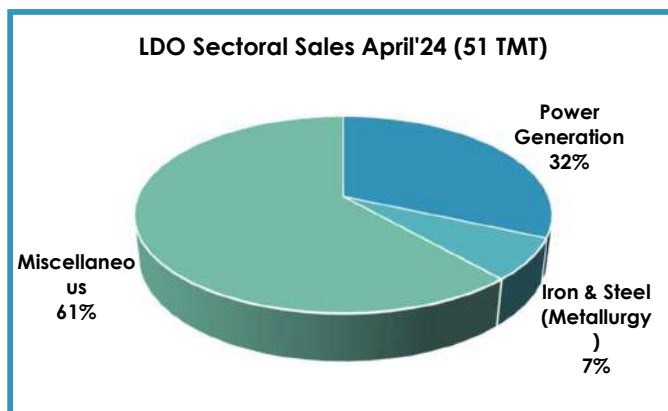
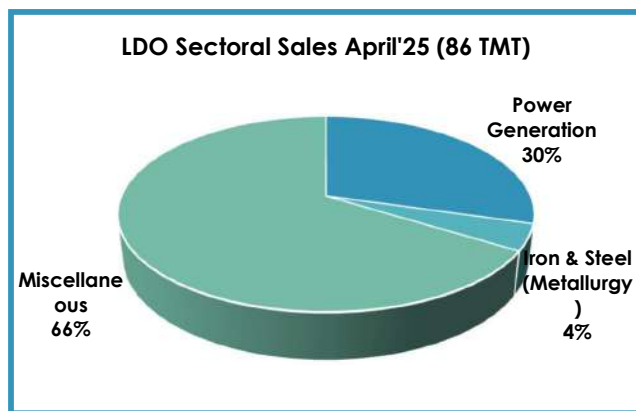
## Sectoral consumption of Light Diesel Oil:

During 'April-25, total LDO domestic consumption with a volume of 0.086 MMT registered a 67.8% growth Year-on Year basis over the volume of 0.051 MMT in 'April-24.

The cumulative consumption of Light Diesel oil (LDO) during 'April-25' was driven by 'Power Generation' 30% followed by Iron & Steel at 4%. Detailed comparisons are pictorially presented in the following figures



Figure-T: Sector wise LDO consumption of 'April-25 and its comparison to April-24



**April- 25:-**  
Power Generation occupied a 30% share for the product followed by Iron & Steel & Misc industries

**April-24:-**  
Power Generation occupied a 32% share for the product followed by Iron & Steel & Misc industries

### Natural Gas:

Natural Gas is used as a feedstock in several industries like fertilizers, plastics and other commercially important organic chemicals and used as a fuel for electricity generation, heating purpose in industrial and commercial units. Natural gas is also used for cooking in domestic households and as a transportation fuel for vehicles.

For the monthly consumption data, please refer NG report published by PPAC.

Total Natural Gas Consumption (including internal consumption) for the month of April 2025

was 5901 MMSCM which was 9.1 % higher than the corresponding month of the previous year.

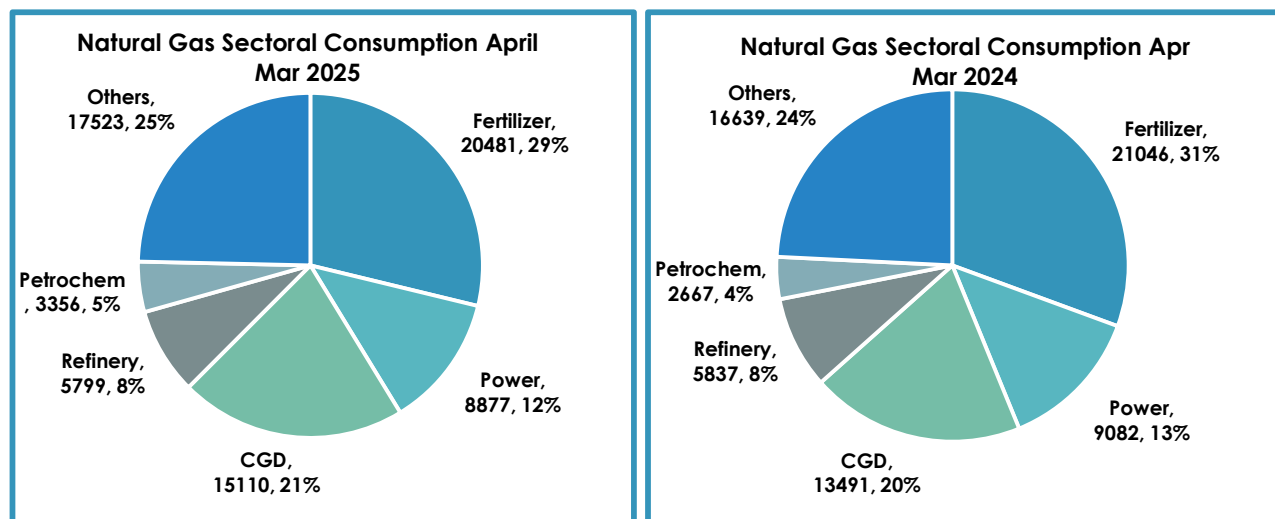
### Sectoral consumption of Natural Gas consumption of 'Apr-Jan-25' & its comparison to 'Apr-Jan-24: (PROVISIONAL)

During Apr-March-25, total Natural Gas monthly domestic consumption with a volume of 71,146 MMSCM, over the volume of of 68,762 MMSCM during the same period in the preceeding year

During Apr- Mar-25, consumption of Natural gas (NG) was driven by fertilizer (29%) followed by CGD (21%), Power (12.5%) Refinery (8%), Petrochemicals (5%). Misc sectors occupied a share of 25% in Apr-Mar 2025.



**Figure-U: Sector wise consumption of Natural Gas of April-March 2025 and its comparison to April-March 2024**



\*Other includes Ceramic, Chemical, Glass, Metal & small customers etc.

P: provisional

<b>April-March 2025</b> Fertilizer sector occupied the highest share for the Consumption of Natural Gas at 29% with the share of CGD increasing steadily.	<b>April-March 2023</b> Fertilizer sector occupied the highest share followed by CGD.
--	--

**Table-9: Conversion factors taken for MT to barrel conversion**

Conversion factor (approx.)		
Product	Weight (MT)	Bbl.
LPG	1	11.6
SKO	1	8.1
Diesel	1	7.6
Petrol	1	8.9
Naphtha	1	8.7
ATF	1	8.1
Bitumen	1	6.1
Furnace Oil	1	6.7
Lubes	1	7.2
Light Diesel Oil	1	7.4
Petcoke	1	5.5
Product Basket (for Others)	1	8.1

Table-10

Industry Consumption Trend Analysis 2024-25 (Provisional)												
('000 MT)												
Product	April-March 2024-25			April								
	FY2023-24	FY2024-25	Growth(%)_2024-25 over 2023-24	2021	2022	2023	2024	2025	Growth(%)_2024 over 2021	Growth(%)_2024 over 2022	Growth(%)_2024 over 2023	Growth(%)_2025 over 2024
(A) Sensitive Products												
LPG	2373	2520	6.2	2102	2157	2154	2373	2520	19.9	16.8	17.0	6.2
SKO	27	26	-3.7	105	72	30	27	26	-75.5	-64.4	-15.1	-3.7
Sub Total	2400	2545	6.1	2207	2230	2185	2400	2545	15.3	14.2	16.5	6.1
(B) Major Decontrolled Product												
HSD	7925	8276	4.4	6676	7199	7818	7925	8276	24.0	15.0	5.9	4.4
MS	3285	3449	5.0	2386	2797	2877	3285	3449	44.6	23.3	19.9	5.0
Naphtha	1217	932	-23.4	1164	974	1113	1217	932	-19.9	-4.3	-16.3	-23.4
ATF	742	771	3.9	412	553	656	742	771	87.4	39.6	17.6	3.9
Bitumen	835	796	-4.7	818	801	878	835	796	-2.7	-0.6	-9.3	-4.7
FO & LSHS	527	480	-8.8	517	522	585	527	480	-7.1	-8.0	-17.8	-8.8
Lubricants & Greases	375	323	-13.8	355	318	274	375	323	-9.1	1.6	18.1	-13.8
LDO	51	86	67.8	96	52	61	51	86	-10.9	64.1	40.9	67.8
Sub Total	14957	15114	1.0	12424	13216	14261	14957	15114	21.7	14.4	6.0	1.0
Sub - Total (A) + (B)	17357	17659	1.7	14631	15446	16446	17357	17659	20.7	14.3	7.4	1.7
(C) Other Minor Decontrolled Products												
Petroleum coke	1805	1738	-3.7	797	1726	1379	1805	1738	118.1	0.7	26.0	-3.7
Others	1001	732	-26.9	895	1283	883	1001	732	-18.2	-42.9	-17.1	-26.9
Sub Total	2806	2470	-12.0	1692	3009	2262	2806	2470	46.0	-17.9	9.2	-12.0
Total	20163	20129	-0.2	16323	18455	18708	20163	20129	23.3	9.1	7.6	-0.2
*Others include sulfur, propylene, propane, reformat, L.A.B.F.S, CBFS, butane, MTO etc.												

Table-11

Industry Consumption Trend Analysis 2024-25 (Provisional)												
('Million Barrels per Day)												
Product	April-March 2024-25			April								
	FY2023-24	FY2024-25	Growth(%)_2024-25 over 2023-24	2021	2022	2023	2024	2025	Growth(%)_2024 over 2021	Growth(%)_2024 over 2022	Growth(%)_2024 over 2023	Growth(%)_2025 over 2024
(A) Sensitive Products												
LPG	0.92	0.97	6.2%	0.81	0.83	0.83	0.92	0.97	19.9%	16.8%	17.0%	6.2%
SKO	0.01	0.0069	-3.7%	0.03	0.02	0.01	0.01	0.01	-75.5%	-64.4%	-15.1%	-3.7%
Sub Total	0.9	1.0	6.1%	0.8	0.9	0.8	0.9	1.0	16.6%	14.9%	16.6%	6.1%
(B) Major Decontrolled Product												
HSD	2.01	2.10	4.4%	1.69	1.83	1.98	2.01	2.10	24.0%	15.0%	5.9%	4.4%
MS	0.97	1.02	5.0%	0.71	0.83	0.85	0.97	1.02	44.6%	23.3%	19.9%	5.0%
Naphtha	0.35	0.27	-23.4%	0.34	0.28	0.32	0.35	0.27	-19.9%	-4.3%	-16.3%	-23.4%
ATF	0.20	0.21	3.9%	0.11	0.15	0.18	0.20	0.21	87.4%	39.6%	17.6%	3.9%
Bitumen	0.17	0.16	-4.7%	0.16	0.16	0.18	0.17	0.16	-2.7%	-0.6%	-9.3%	-4.7%
FO & LSHS	0.12	0.11	-8.8%	0.12	0.12	0.13	0.12	0.11	-7.1%	-8.0%	-17.8%	-8.8%
Lubricants & Greases	0.09	0.08	-13.8%	0.09	0.08	0.07	0.09	0.08	-9.1%	1.6%	18.1%	-13.8%
LDO	0.01	0.02	67.8%	0.02	0.01	0.01	0.01	0.02	-10.9%	64.1%	40.9%	67.8%
Sub Total	3.9	4.0	1.0%	3.2	3.5	3.7	3.9	4.0	22.5%	14.8%	6.5%	1.0%
Sub - Total (A) + (B)	4.9	4.9	2.0%	4.1	4.3	4.6	4.9	4.9	21.3%	14.8%	8.4%	2.0%
(C) Other Minor Decontrolled Products												
Petroleum coke	0.33	0.32	-3.7%	0.15	0.32	0.25	0.33	0.32	118.1%	0.7%	26.0%	-3.7%
Others	0.27	0.20	-26.9%	0.24	0.34	0.24	0.27	0.20	-18.2%	-42.9%	-17.1%	-26.9%
Sub Total	0.6	0.5	-14.1%	0.4	0.7	0.5	0.6	0.5	33.4%	-22.0%	5.2%	-14.1%
Total	5.5	5.46	0.2%	4.5	5.0	5.1	5.5	5.5	22.3%	9.9%	8.1%	0.2%
*Others include sulfur, propylene, propane, reformat, L.A.B.F.S, CBFS, butane, MTO etc.												





## **Petroleum Planning & Analysis Cell**

Ministry of Petroleum & Natural Gas, Government of India

*Har Kaam Desh Ke Naam*

**Petroleum Planning and Analysis Cell (PPAC)**  
**Ministry of Petroleum & Natural Gas**  
**2nd Floor, Core-8, SCOPE Complex**  
**7, Lodhi Rd, Institutional Area,**  
**New Delhi, 110003**  
<https://www.ppac.gov.in>

