

# INDUSTRY CONSUMPTION REPORT POL & NG

April 2026

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## CIRCULATION:

पेट्रोलियम और प्राकृतिक गैस मंत्रालय:	MoP&NG:
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संख्या : डी-12013/02/2026-I  
No. D-12013/02/2026-I

**Subject: Industry Consumption Review Report of PPAC: April 2026**

The monthly Petroleum Industry Consumption Review Report has been prepared by the Petroleum Planning and Analysis Cell (PPAC) for the month of April 2026. 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 input from Industry Performance Review coordinators & OMC head office officials namely, Shri Apurba Ghosh-IOCL, Shri Sandesh Mane HPCL & Shri Manoj Kumar Jha BPCL.

If you have any question on this report, please write to Mr. Raj Shekhar, Jt. Director- (Demand & Economics Studies), at [demand.es-officer1@ppac.gov.in](mailto:demand.es-officer1@ppac.gov.in)

धन्यवाद,

Thanking you,

विजय कंसल  
अपर निदेशक (मांग एवं आर्थिक अध्ययन)  
Vijay Kansal  
Additional Director (Demand & Economic Studies)

## Highlights of the month: April-2026

- On April 6, 2026, India's **500 MWe Prototype Fast Breeder Reactor (PFBR)** at Kalpakkam achieved first criticality. This made India only the second country after Russia to operate a commercial-scale fast breeder reactor, a technology indigenously designed by the Indira Gandhi Centre for Atomic Research (IGCAR)
- **India's Manufacturing PMI** climbed to **54.7 in April 2026**, up from 53.9 in March, indicating a strong start to the new fiscal year as factory activity rebounded from the previous month's seasonal dip. New export orders grew at the **fastest pace since September 2025**, and employment in the sector reached a **10-month high**.
- India's **goods and services tax (GST)** collections for **April 2026** reached **₹2,10,234 crore**, a significant milestone reflecting strong domestic demand and structural momentum.
- **India's retail inflation (CPI)** rose to a provisional **3.48% in April 2026**, up from 3.40% in March, marking the fourth consecutive month of gradual increases as the new fiscal year commenced.
- The government progress on **OALP-XI** (March 2026) continues with 21 blocks offered across **80,234 sq km**, while the bidding window for **OALP-X** remains open until **May 2026** to encourage further exploration in deepwater and frontier basins
- Driven by intense heatwaves, India's peak electricity demand hit a record **256.1 GW** on **April 25, 2026**. This demand was successfully met with **solar energy** contributing a significant **21.5%** (56.2 GW) to the generation mix during the peak.
- **BPCL** successfully completed one of the country's first large-scale offshore **Horizontal Directional Drilling (HDD)** crossings under the **Mumbai-Rasayani Pipeline Project**, reinforcing fuel supply resilience in challenging inter-tidal zones.
- India's total vehicle retail sales recorded a steady year-on-year growth of **12.94%** in April 2026, reaching **26.11 lakh units**. This performance marked the best-ever April in history for the overall industry. Segment-wise, two-wheeler (2W) sales grew by 13.01% to 19.16 lakh units in April, supported by improved rural liquidity and an extended marriage season. The passenger vehicle (PV) segment also registered healthy growth of 12.21% to 4.07 lakh units, achieving its highest-ever April volumes on record.
- On **April 23, 2026**, the government amended the **Aviation Turbine Fuel (ATF) Control Order** to officially include SAF-blended fuel. This administrative move allows for the regulated marketing and distribution of SAF, aligning India with global standards like CORSIA (Carbon Offsetting and Reduction Scheme for International Aviation).

## SUMMARY OF PRODUCT WISE POL

1. The consumption of petroleum products in April 2026 with a volume of 19.30 MMT registered a de-growth of 4.6% against the historical of 20.23 MMT in April 2025.
2. MS (Petrol) consumption during the month of April 2026 with a volume of 3.68 MMT (1.09 mbpd) recorded a growth of 6.8% on the volume of 3.45 MMT (1.02 mbpd) in April 2025.
3. Ethanol blending in Petrol was 20.0% during April'26 and cumulative ethanol blending during November 2025- Apr'2026 was 20.0%.
4. The Domestic Sale of Passenger Vehicles in Apr 2026 with a volume of 4.07 lacs registered a healthy growth of 12.21% over Apr 2025, as per FADA. Reduction in GST rates on vehicles along with year-end discounts has significantly boosted passenger vehicle (PV) demand.
5. HSD (Diesel) consumption during the month of April 2026 with a volume of 8.33 MMT (2.11 mbpd) registered growth of 0.9% over the volume of 8.26 MMT (2.10 mbpd) in the month of April 2025.
6. LPG consumption during the month of April 2026 with a volume of 2.21 MMT registering a de-growth of 13.1% over the volume of 2.54 MMT in April 2025.
7. ATF consumption during April 2026 with a volume of 771 TMT continued to register a de-growth of 0.1%, over a volume of 772 TMT during the month of April 2025.
8. Bitumen consumption during April 2026 with a volume of 598 TMT registered a de-growth of 30.5% over the volume of 862 TMT in the month of April 2025.
9. Kerosene (SKO) consumption with a volume of 28 TMT registered a de-growth of 9.7% in April 2026 as compared to April 2025. SKO consumption during the month is largely constituted by PDS category with a 83% share.
10. Total Natural Gas Consumption (including internal consumption) for the month of April 2026 (P) was 4703 MMSCM which was 16.7% lower than the corresponding month of the previous year.
11. As on 30th April 2026, number of active LPG domestic connections are 33.37 cr and PMUY connections 10.58 cr.



This report analyses the trend of consumption of petroleum products in the country during the month of April 2026. Data on product-wise monthly consumption of petroleum products for April 2026 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 2026 is given in Table-1

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

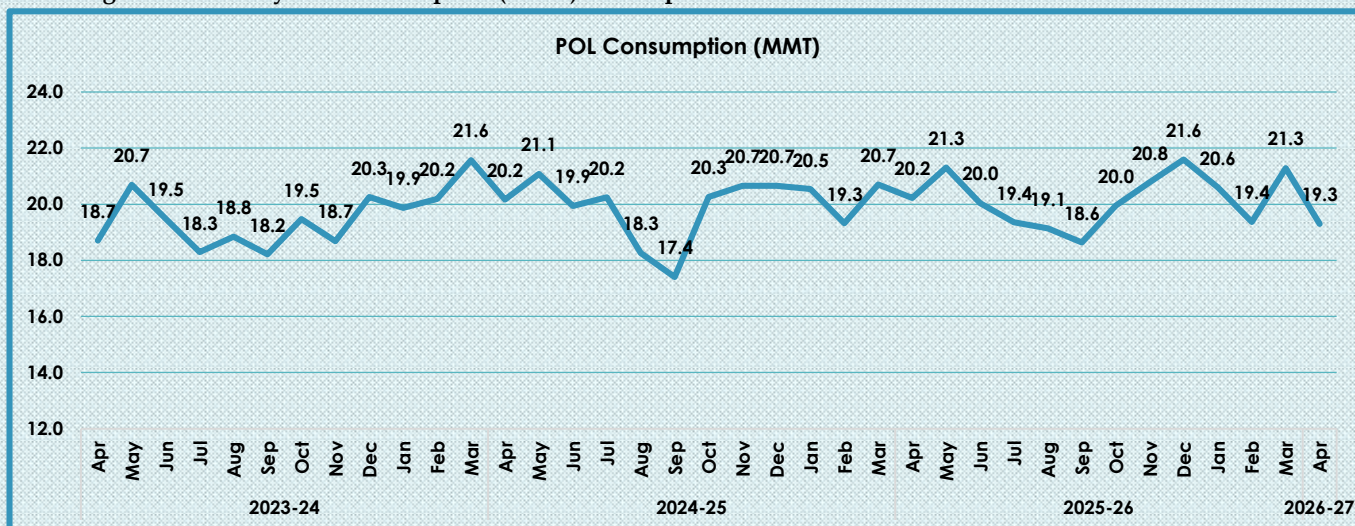
POL CONSUMPTION REPORT-April 2026									
Product	April (TMT)				April-March (TMT)				
	2025	2026	% share of	Growth (%)	2025-26	2026-27	Growth (%)	% share of	
			Apr'26					Apr-Mar'27	
<b>(A) Sensitive Products</b>									
LPG	2545	2212	11.5	↓ -13.1	2545	2212	↓ -13.1	11.5	
SKO	26	28	0.1	↑ 9.7	26	28	↑ 9.7	0.1	
<b>Sub Total</b>	<b>2570</b>	<b>2240</b>	<b>11.6</b>	<b>-12.9</b>	<b>2570</b>	<b>2240</b>	<b>-12.9</b>	<b>11.6</b>	
<b>(B) Major Decontrolled Product</b>									
HSD	8261	8332	43.2	↑ 0.9	8261	8332	↑ 0.9	43.2	
MS*	3449	3684	19.1	↑ 6.8	3449	3684	↑ 6.8	19.1	
Naphtha	935	759	3.9	↓ -18.9	935	759	↓ -18.9	3.9	
ATF	772	771	4.0	↓ -0.1	772	771	↓ -0.1	4.0	
Bitumen	862	598	3.1	↓ -30.6	862	598	↓ -30.6	3.1	
FO/LSHS	494	490	2.5	↓ -0.9	494	490	↓ -0.9	2.5	
Lubes+Greases	398	361	1.9	↓ -9.4	398	361	↓ -9.4	1.9	
LDO	86	45	0.2	↓ -47.0	86	45	↓ -47.0	0.2	
<b>Sub Total</b>	<b>15258</b>	<b>15040</b>	<b>77.9</b>	<b>-1.4</b>	<b>15258</b>	<b>15040</b>	<b>-1.4</b>	<b>77.9</b>	
<b>(C) Other Minor Decontrolled Products</b>									
Pet.Coke	1562	1506	7.8	↓ -3.6	1562	1506	↓ -3.6	7.8	
Others*	837	509	2.6	↓ -39.2	837	509	↓ -39.2	2.6	
<b>Sub Total</b>	<b>2399</b>	<b>2015</b>	<b>10.4</b>	<b>-16.0</b>	<b>2399</b>	<b>2015</b>	<b>-16.0</b>	<b>10.4</b>	
<b>Total</b>	<b>20227</b>	<b>19295</b>	<b>100</b>	<b>-4.6</b>	<b>20227</b>	<b>19295</b>	<b>-4.6</b>	<b>100</b>	
*Others include sulfur, propylene, propane, reformat, L.A.B.F.S, CBFS, butane, MTO etc. <b>MS Sales includes Ethanol Blending</b>									
NOTE :									
i) All figures are provisional.									
ii) The source of information includes Oil Companies and DGCIS data.									
iii) The consumption estimates represent market demand and is aggregate of :									
(a) actual sales by oil companies in domestic market.									
(b) consumption through direct imports by private parties (Private direct imports ) prorated for Mar'26-Apr'26, which may undergo change on receipt of actual data), and									
(c) MS Sales includes Ethanol Blending .									

**India's petroleum product consumption in April 2026 was 19.30 million metric tonnes with 4.6% de-growth over Apr 2025. This consumption was primarily driven by higher demand for MS at 6.8%, HSD at 0.9% and SKO at 9.7%.**

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.

Pan India based domestic POL monthly consumption trend since April-2023 is shown in Figure-A.

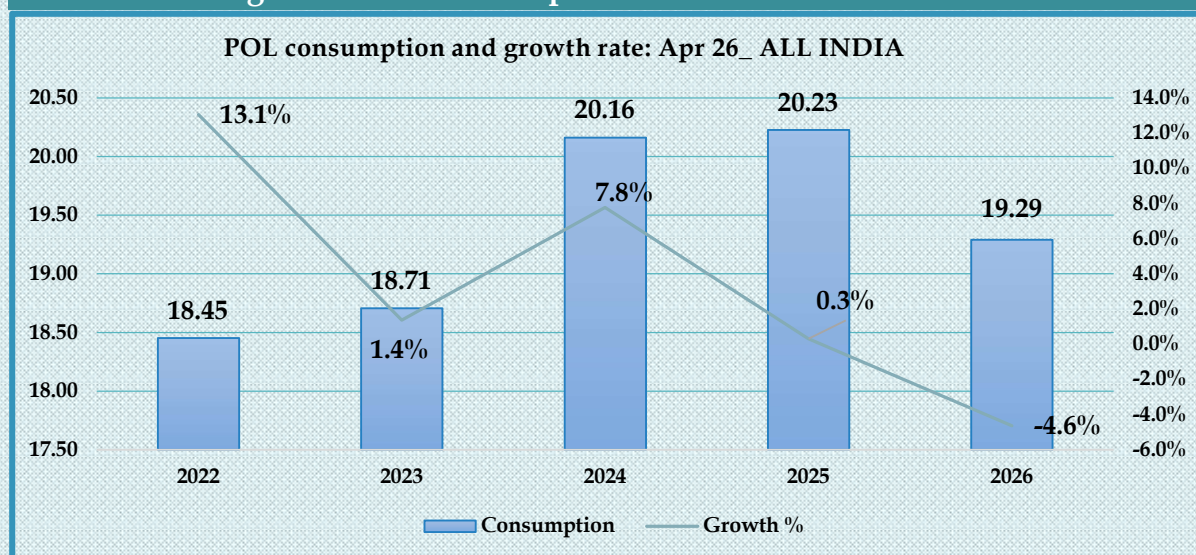
Figure-A: Monthly POL consumption (MMT) since April 2023



✓ The overall POL domestic consumption profile of the Apr 2026 & its pattern since 2022

with corresponding consecutive YoY growth rates are shown in the Figure-B.

Figure-B: POL consumption & Growth rate YoY basis



Source: PPAC Y2 data & OMCs sales

Sales data in MMT

### Petrol/Motor Spirit (MS):

MS (Petrol) consumption during the month of April 2026 with a volume of 3.68 MMT recorded a growth of 6.8% on the volume of 3.45 MMT in April 2025.

PSU's registered a growth rate of 8.6% as against 9.9% decrease by their private sector counterparts in Apr-26.

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

- With GST 2.0 triggering broad-based demand across personal mobility segments, accelerating new vehicle purchases which resulted in PV segmenting growing by 12.21% and 2W by 13.01% in April 26.
- Migrant Workforce and the marriage season in April also boosted personal vehicle usage for travelling, leading to a notable rise in petrol (motor spirit) demand. The sustained increase reflects continued expansion in private mobility, higher vehicle ownership in the country.

Figure-C: State Wise Growth in MS Month of Apr-2026

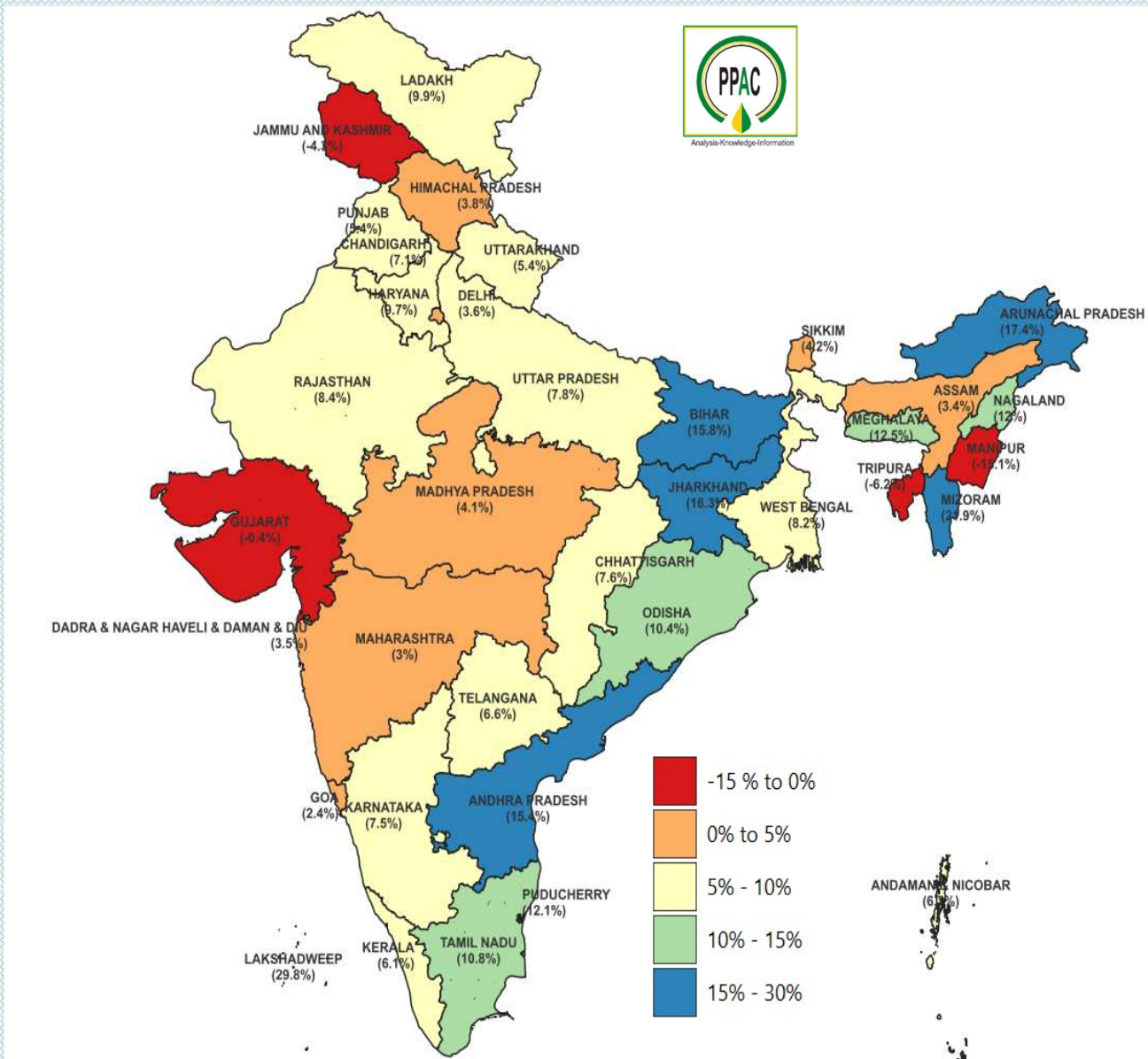
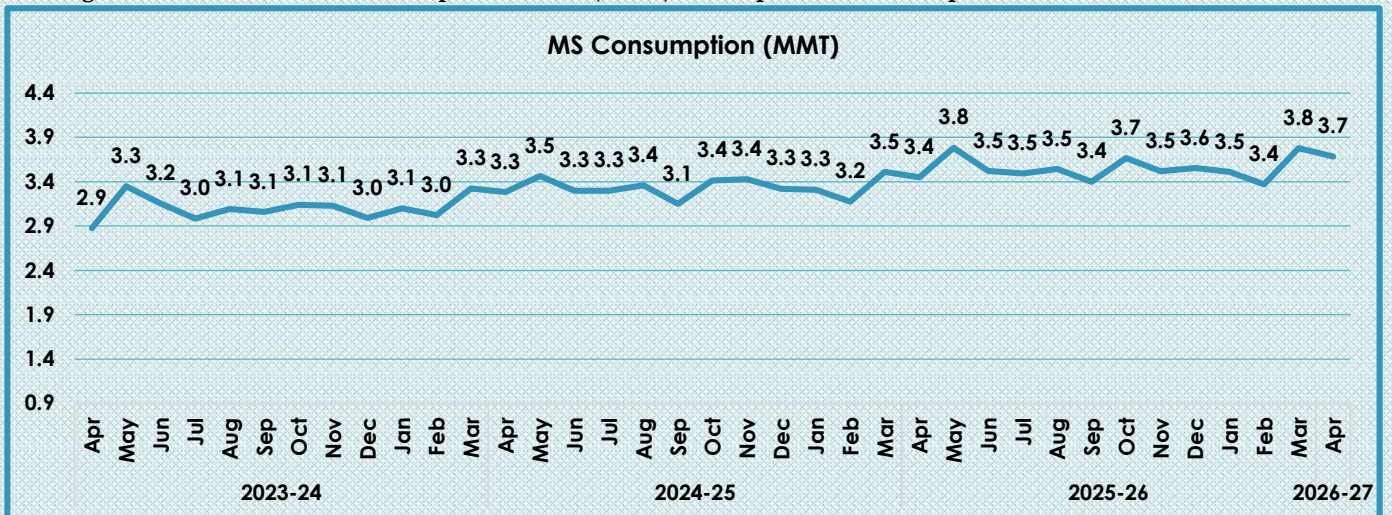


Figure-D: Month wise MS consumption volume (MMT) from April- 2023 to till Apr-2026



### Factors impacting consumption of MS:

#### Passenger Vehicle Sales:

The Sale of Passenger Vehicles in April 2026 at 4.07 lacs registered 12.2% growth YoY in the month of Apr 25. Passenger Vehicle (PV) sales in

April 2026 demonstrated strong year-on-year (YoY) growth.

The details of PVs Sales are tabulated below, as shown in the following Table-2.

**Table-2: Passenger cars & Utility vehicles sales in the month of April 2026 (Primary sales data)**

Vehicle Segment	April'26		
	2025	2026	Growth %age
Total PV	363,028	407,355	12.2%

Source: FADA

#### Two-Wheeler Sales:

Two-wheeler sales in April 2026 with a volume of 19.16 lacs registered 13.0% growth, YoY basis over volume of 16.96 lacs during April 2025.

#### Three-Wheeler sales

Three-wheeler domestic sales in Apr 2026 with a volume of 1.07 lac recorded a growth of 7.2 %, YoY basis over the volume of 1.00 lacs in Apr 2025

**Table-3: Vehicle wise sales comparison (Primary sales data)**

CATEGORY	Apr 25	Apr 26	Growth %
2W	1,695,638	1,916,258	13.0%
Passenger Carrier-3 W	42,326	57,767	36.5%
Goods Carrier-3 W	10,322	13,133	27.2%
E-Rickshaw	39,504	28,154	-28.7%
E-cart	7,447	7,742	4.0%
Total Three Wheelers	99,599	106,796	7.2%

Source: FADA

#### High Speed Diesel (HSD):

HSD (Diesel) consumption during the month of April 2026 with a volume of 8.33 MMT, registered a growth of 0.9% on the volume of 8.26 MMT in the month of April 2025.

PSUs registered a 5.1% growth and private sector witnessed 30.0% growth in the month of Apr-26.

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

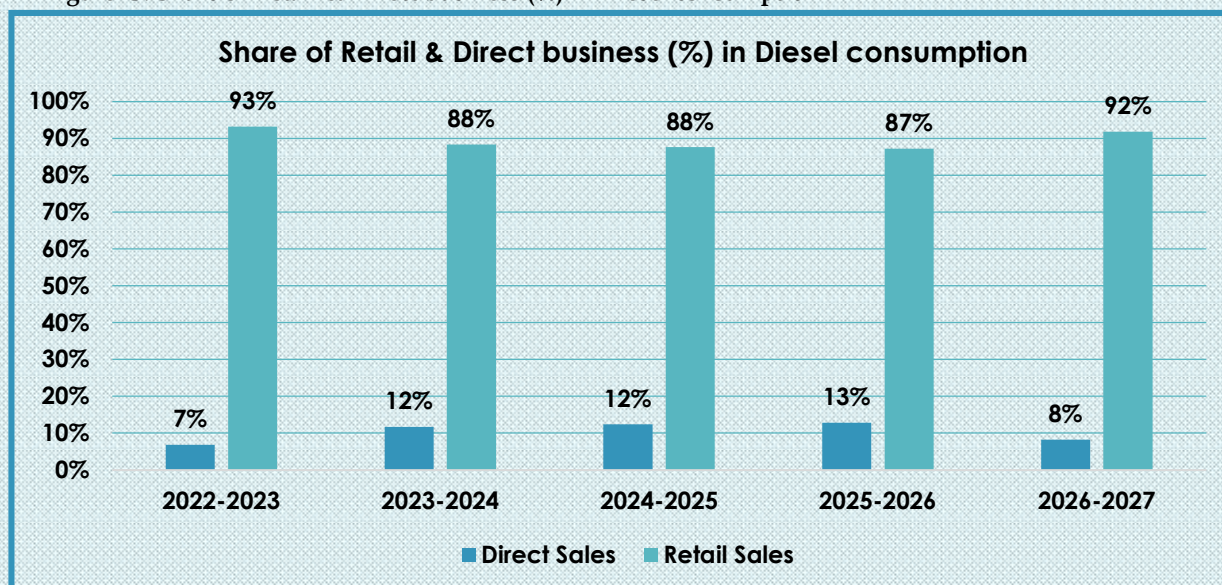
- While infrastructure projects and road freight continue to support demand, The modest growth was registered because sales in agricultural areas moved forward to March 2026 due to panic buying by farmers. PSUs registered strong growth as sales shifted from some private OMCs following their price hikes. As a result, PSU oil companies recorded sales growth of 4.63%, while private sector competitors saw a sharp decline in growth by 31.70%. Consequently, PSU market share gained by 3.84% to 91.79%, with Private Oil Marketing Companies (OMCs) recording a corresponding loss. HSD remains the largest consumed

petroleum product, accounting for 43.2% of the total market share in April 2026.

- On the growth side it was primarily driven by robust demand from infrastructure activities, including mining, highway construction, railway projects, and urban development works, which are heavily reliant on diesel-powered heavy equipment and increased road freight movement.
- The operationalization of the Greenfield Amritsar-Jamnagar Expressway had structurally altered long-haul freight traffic patterns, leading to de-growth of HSD in Haryana. This dedicated economic corridor bypasses the traditional state highways and national arterials of Haryana shifting volumes to other states.
- Bulk customers of HSD in Gujarat have shifted to border Rajasthan Retail outlets due to supply constraints and cost gap.
- Jharkhand, Odisha and Rajasthan form the core of India's heavy mineral and coal mining belt, and intense industrial activity in these states led to High-Speed Diesel (HSD) growth.



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



### Factors impacting consumption of HSD:

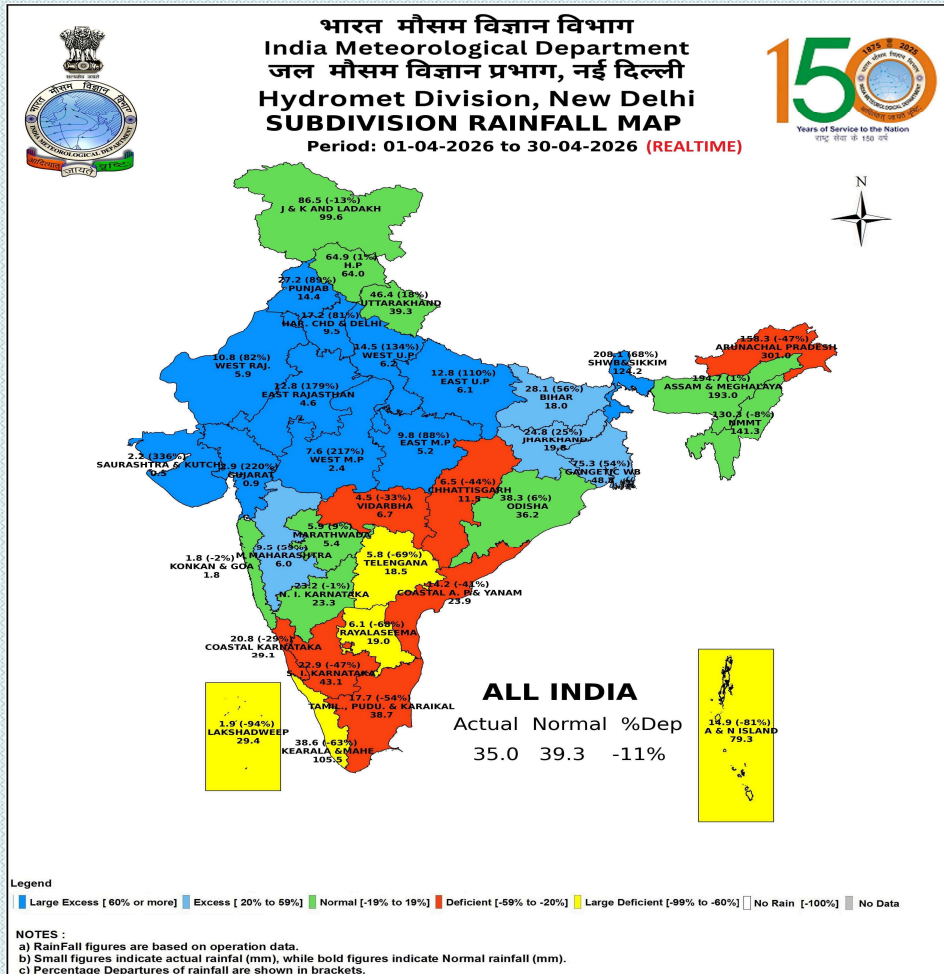
#### Weather

April 2026 witnessed a significant improvement in weather conditions compared to the exceptionally dry February. The month recorded above-normal rainfall over many parts of the country due to multiple active western disturbances, cyclonic circulations, and thunderstorm activity. Frequent spells of rain, hailstorms, and gusty winds provided intermittent relief from rising temperatures during the first half of the month, although heatwave conditions intensified across several regions towards the end of April.

#### Regional Breakdown

- **Northwest India:** The region received fairly widespread rainfall and thunderstorms during early April due to active western disturbances. However, heatwave conditions strengthened during the latter half of the month, particularly over Rajasthan, Punjab, Haryana, and Delhi.
- **East and Northeast India:** Rainfall activity improved compared to previous months, supported by thunderstorms and moisture inflow from the Bay of Bengal. Despite this, parts of Bihar, Jharkhand, Odisha, and West Bengal experienced rising temperatures and localized heatwave conditions towards month-end.
- **Central India:** Central parts of the country witnessed intermittent thunderstorms and scattered rainfall during early April, followed by intense heatwave conditions later in the month. Several locations in Madhya Pradesh, Chhattisgarh, and Vidarbha recorded temperatures above normal.
- **South Peninsular India:** Southern India remained relatively stable, with Kerala, Karnataka, and Tamil Nadu receiving scattered to moderate rainfall accompanied by thunderstorms. The rainfall activity helped moderate extreme heat across much of the region.

Figure- H: State wise Rainfall Map for April 26. (Source: Indian Meteorological Department)  
Period 01.04.2026-30.04.2026



**Commercial Vehicle**

Based on data from FADA Research, Indian domestic sales of commercial vehicles registered a growth of 15.0% as compared to April 2025 as shown in Table-4

**Tractor Sale:**

Tractor domestic sales in April 2026 with a volume of 75,109 registered a growth of 23.2% over the volume of 60,956 in April 2025, driven by strong rural demand, increased mechanization, and positive farmer sentiment.

Table-4: Domestic commercial vehicles & tractors sales with YoY comparison (Secondary sales data)

Commercial vehicles & tractors		Apr'26		
		2025	2026	Growth %age
CV	LCV	47,510	55,949	17.8%
	MCV	7,222	9,177	27.1%
	HCV	31,567	34,170	8.2%
	Others	65	43	-33.8%
<b>Total CVs</b>		<b>86,364</b>	<b>99,339</b>	<b>15.0%</b>
<b>Tractors</b>		<b>60,956</b>	<b>75,109</b>	<b>23.2%</b>

Source: FADA research

### 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 in e-way bill generation. The number of E-way bills reflects quantum of transport activities directly influencing Diesel sales.

**Table-5 Details of the Total E-Way Generated in CY vis-a-vis LY :**  
(No of E-way Bills Generated in Lakhs)

Month	April-26	April-25	Variance
Intra State	880.07	770.18	14%
Inter State	453.66	422.48	7%
<b>Total</b>	<b>1,333.72</b>	<b>1,192.66</b>	<b>12%</b>

Source: GSTN Portal

### Port Traffic:

The Major Ports achieved cargo throughput of 73.76 MMT during April 2026 which is 2.37% higher over same Period last year.

**Table-6: Cargo handled at major ports in Apr'2026 (Qty in TMT)** Source: ipa.nic.in

Ports	Apr'26	Apr'25	Growth (%)
Kolkata & Haldia	5209	5983	-12.94
Paradip	12608	12601	0.06
Visakhapatnam	7404	6711	10.33
Kamarajar (Ennore)	4076	3710	9.87
Chennai	4532	4737	-4.33
V.O. Chidambaranar	3790	3434	10.37
Cochin	2737	3032	-9.73
New Mangalore	3971	3546	11.99
Mormugao	1978	1543	28.19
Mumbai	6088	5490	10.89
JNPA	9618	8436	14.01
Deendayal	11749	12829	-8.42
<b>Total:</b>	<b>73760</b>	<b>72052</b>	<b>2.37</b>

### POWER SITUATION:

India's peak power demand surged to an all-time record of **256.44 GW** on **April 26**, compared with 235.19 GW in the previous

year. The peak demand was at a similar level to the previous high of 245.44 GW, according to data from the Central Electricity Authority (CEA).

**Table-7: Power availability vs requirement for current & previous period (upto Apr 2026)**

Year	Energy				Peak			
	Requirement	Availability	Surplus(+)/Deficit (-)		Peak Demand	Peak Met	Surplus (+) / Deficits (-)	
	(MU)	(MU)	(MU)	(%)	(MW)	(MW)	(MW)	(%)
<b>2022-23</b>	134,781	132,082	-2,699	-2.0%	215,888	207,231	-8,657	-4.0%
<b>2023-24</b>	130,414	130,082	-332	-0.3%	216,142	215,972	-170	-0.1%
<b>2024-25</b>	144,403	144,280	-123	-0.1%	224,181	224,052	-129	-0.1%
<b>2025-26</b>	147,421	147,289	-132	-0.1%	235,190	235,190	0	0.0%
<b>2026-27</b>	153,905	153,619	286	0.2%	256,436	256,117	319	0.1%

## SECTORAL CONSUMPTION OF HSD:

During 'April-26, HSD total consumption with a volume of 8.33 MMT registered 0.9% growth Year-on-Year basis over the volume of 8.26 MMT in 'April-25.

92% of HSD consumption during 'April-26', was constituted by retail sales. Balance 8% falls under direct sales category as shown in I(I/II) figure. The bifurcation was 92:8 in 'April-26' also after direct sales volume recovering back

High-Speed Diesel (HSD) consumption remained relatively flat in April 2026, registering a slight year-on-year growth of 0.9%. While infrastructure projects and road freight continue to support demand, The modest growth was registered

because sales in agricultural areas moved forward to March 2026 due to panic buying by farmers.

In direct sales category, the sectoral consumption break up is shown in I(II) figure. i.e., for April-26 'Road Transport' was 28%, the highest share followed by Mining 19%, Manufacturing at 6%, Shipping 10%, Agriculture 3% and Power Generation 2%. Railways share increase from 9% to 11%. Retail sales continue to cater to mostly the road transport.

Also share of Road transport & shipping increased by 9% & 3% respectively.

Figure-I(I): Sector-wise HSD consumption in Apr'26 and its comparison with Apr'25

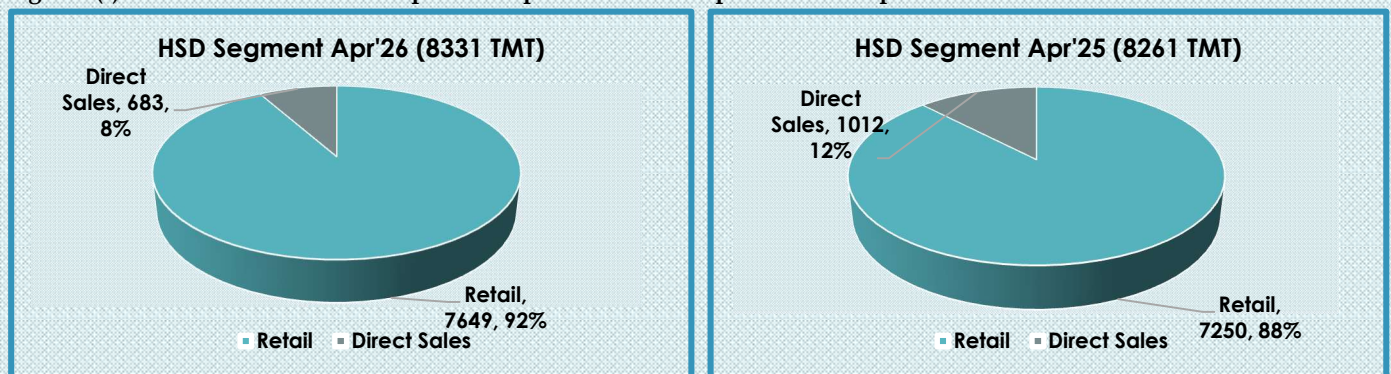
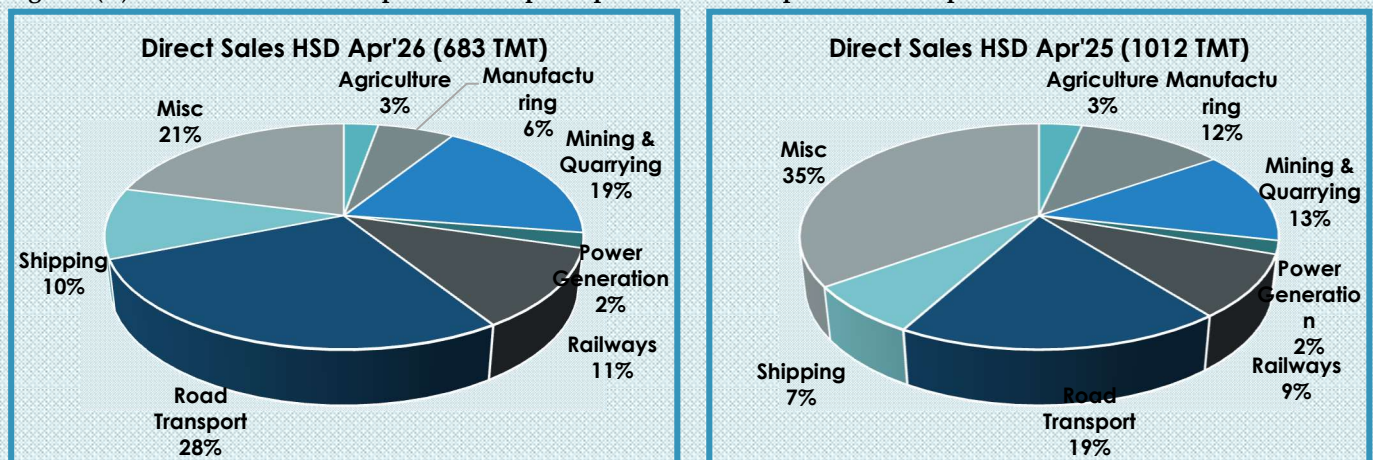


Figure-I(II): Sectoral HSD consumption Breakup in Apr'26 and its comparison with Apr'25



Share of Manufacturing has reduced from 12% to 6% owing to weaker demand from the Cement & Metal industry in the Direct Sales segment. Share of Mining sector increased from 13% to 19%. 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 28 TMT registered a growth of 9.7% in Apr 2026 as compared to Apr 2025. Growth in SKO is attributed to demand from mainly the fisheries sector from the coastal states and due to redistribution through ration shops to provide relief to rural and low-income populations to counter potential disruptions in the LPG supply chain.

Total 17 states i.e. Andaman & Nicobar Islands, Andhra Pradesh, Dadra & Nagar Haveli and Daman

& Diu, Goa, Gujarat, Himachal Pradesh, Haryana, J&K, Ladakh, Lakshadweep, Madhya Pradesh, Madhya Pradesh, Nagaland, Puducherry, Punjab, Rajasthan, Telangana and Uttarakhand have Adhoc allocation and 2 states -Chandigarh & Delhi have NIL allocation in the month of April 2026.

The market share of subsidized-PDS and other SKO was 83% & 17% respectively for the month Apr 2026 as shown in the following figure-J.

Figure-J: Month-wise PDS & other-SKO consumption in share (%) from April 2022 to till date

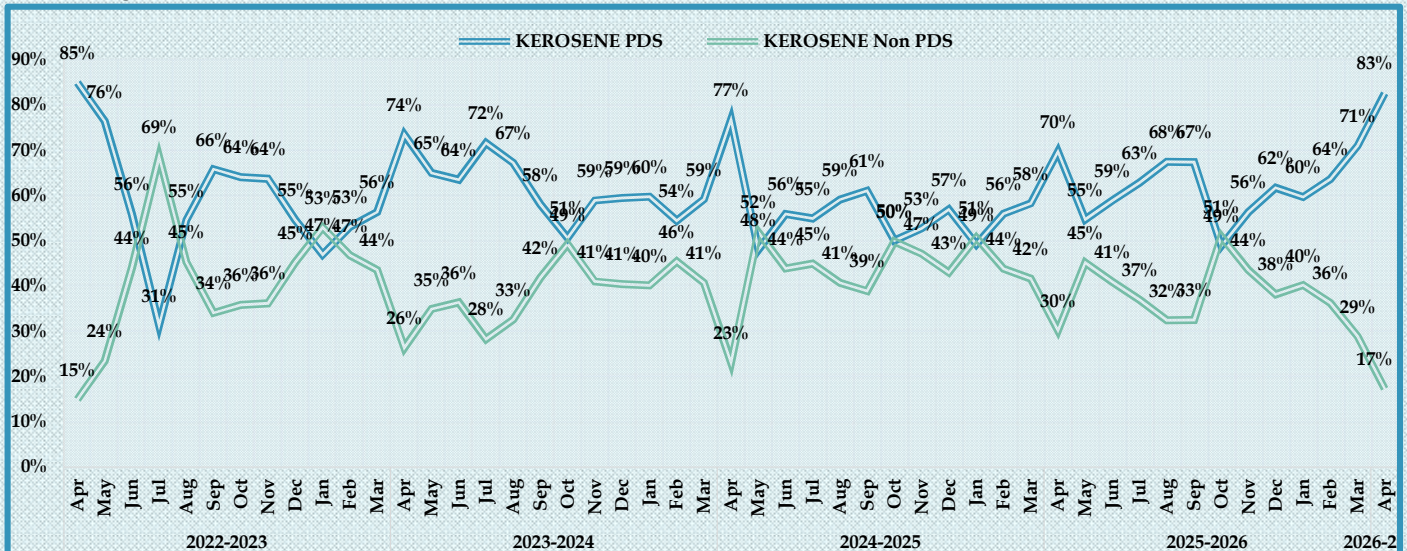
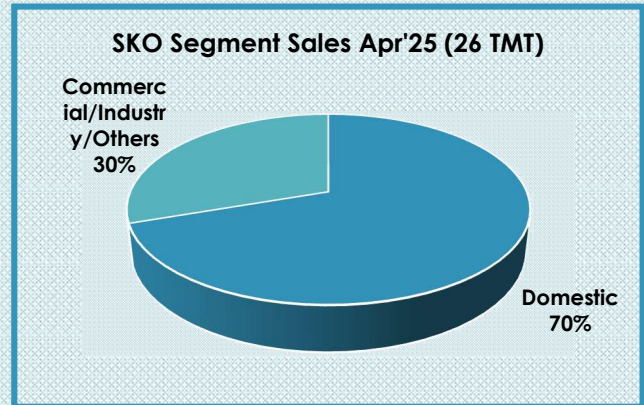
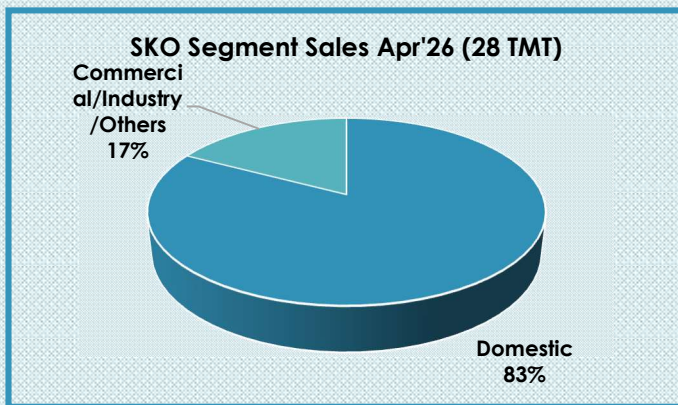


Figure-K: \*Other SKO: non-subsidized PDS SKO +non-PDS kerosene



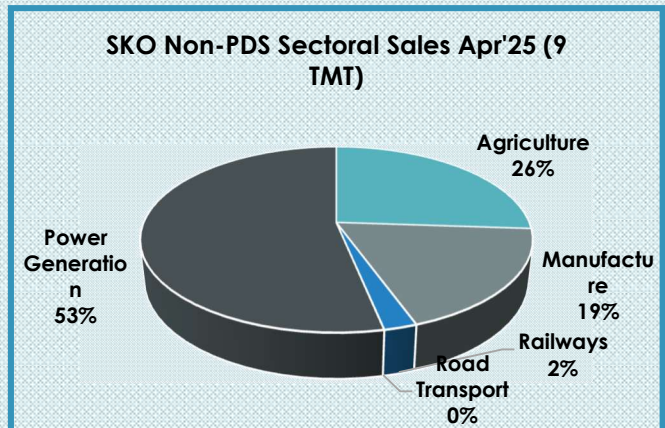
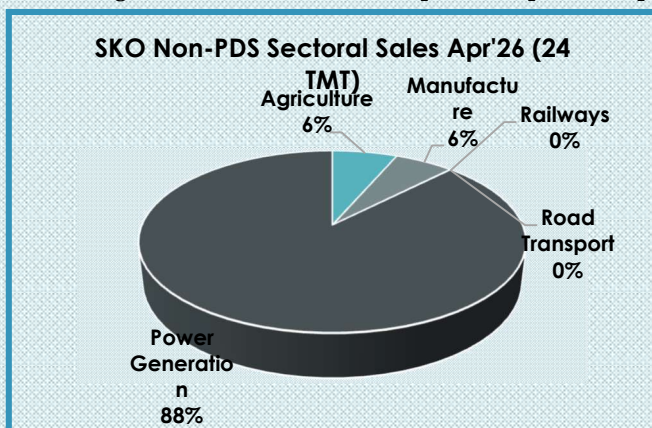
**Sectoral consumption of SKO:**

Out of total SKO sales during 'Apr'26 'PDS subsidized SKO' upliftment constituted 83%. So far as sales in 'Other SKO' is concerned, agriculture

accounted for 6% share, Manufacturing 6%, and Miscellaneous applications at 88%.

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

Figure-L: SKO' sales YoY comparison Apr'26 vs Apr'25



### LUBES:

Lubes consumption with a volume of 361 TMT registered a degrowth of -9.4% in Apr 2026 as compared to Apr 2025. A sharp escalation in

international base oil feedstocks, additives, and freight costs driven by ongoing geopolitical supply shocks has triggered successive retail price hikes leading to a notable suppression in lubricant demand.

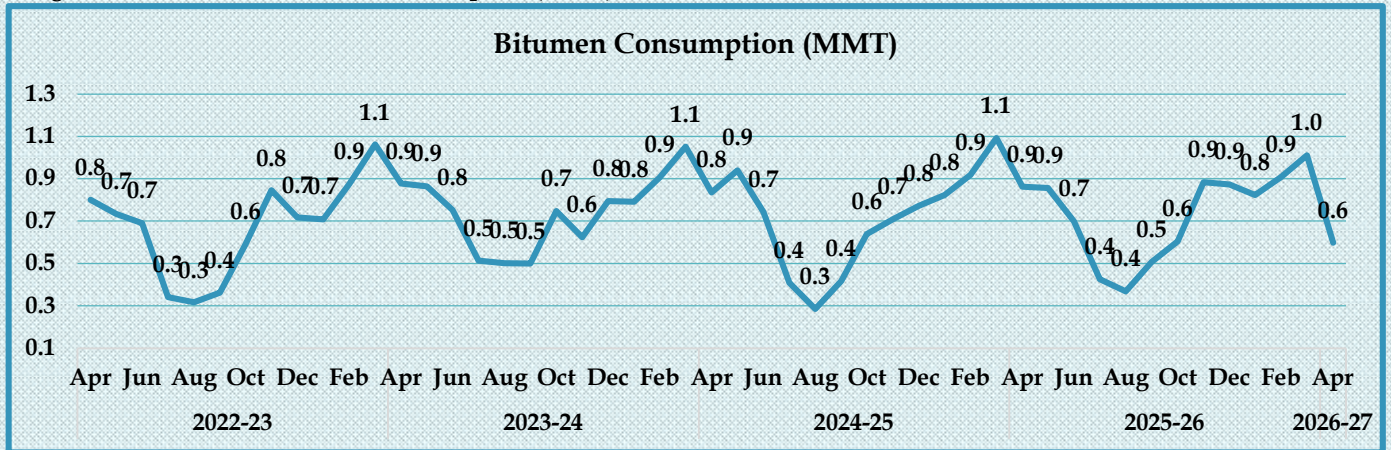
### BITUMEN:

Bitumen consumption during Apr 2026 with a volume of 598 TMT registered a de-growth of 30.6% over the volume of 862 TMT in the month of Apr 2025.

Bitumen registered a significant decline as ongoing geopolitical tension in Middle East severely disrupted the bitumen supply chain and resulted in price increase.

Ongoing geopolitical tensions in the Middle East have severely fractured the bitumen supply chain, resulting in a critical volume contraction driven by an unprecedented **60% price hike in imported bitumen**. Although some states like UP and Maharastra have stepped in to bear the financial burden, the majority of states have been unable to absorb the fiscal shock, effectively pushing the pricing risk down the infrastructure delivery chain.

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



### Sectoral consumption of Bitumen:

During 'Apr-26, total bitumen consumption with a volume of 598 TMT registered a de-growth of 30.6% Year-on Year basis over the volume of 862 TMT in 'Apr-25.

98% of cumulative bitumen sales during 'Apr-26-FY2026-27', was constituted to Road construction, balance 2% was consumed by miscellaneous industries.

### LPG:

LPG consumption during the month of Apr 2026 with a volume of 2.21 MMT registered de-growth in the month at 13.1% over the volume of 2.54 MMT in the month of Apr 2025. LPG consumption during the month driven by rising non-domestic sales and bulk segment.

industrial applications. Auto LPG is an automotive fuel used by three and four-wheeler vehicles.

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

LPG de-grew by 13.1% on account of the geopolitical situation and booking interval restrictions in domestic and also due to the restrictions on the commercial & industrial supply. The **LPG Control Order of March 8, 2026**, implemented a 70% supply cap on commercial and industrial LPG demand. This regulatory measure safeguarded household availability of LPG by preventing commercial and industrial entities from competing for limited supplies.

Non-Domestic LPG along with de-growth in Bulk LPG contributed to total LPG growth.

1. 11.1% de-growth in Packed domestic LPG consumption in Apr'26 as compared to Apr'25.
2. **De-Growth of 10.2% in non-domestic packed segment.**
3. Under PMUY scheme 10.57 crores beneficiaries at the end of Apr 2026.
4. As on 1.05.2026, total active domestic connections in India are 3337 lakhs

De-growth in consumption of domestic LPG in Apr'26 compared to Apr'25 are as follows:

- **PMUY de-growth remained at 23.6%.**

- Growth of 87.5% in Auto LPG sales due lower base in the previous year and shift in demand from private to public sector companies due to supply restriction on account of middle east conflict.

5. 14.0 Crs cylinders of 14.2kg (~46.5 lacs/day) were delivered in Apr'26 compared to 15.7 Crs in Apr'25.
6. **De-Growth of 82.1% in Bulk LPG consumption is due to supply restrictions arisen out of war in West Asia which resulted in regulated supply**
7. The supply issues due to Middle East crisis has led to **LPG demand destruction**. Due to unavailability of fuel, Industrial consumers are actively migrating to alternative fuels like fuel oil and even NG to maintain baseline operations.

Figure-N: State Wise Growth in LPG month of Apr'26

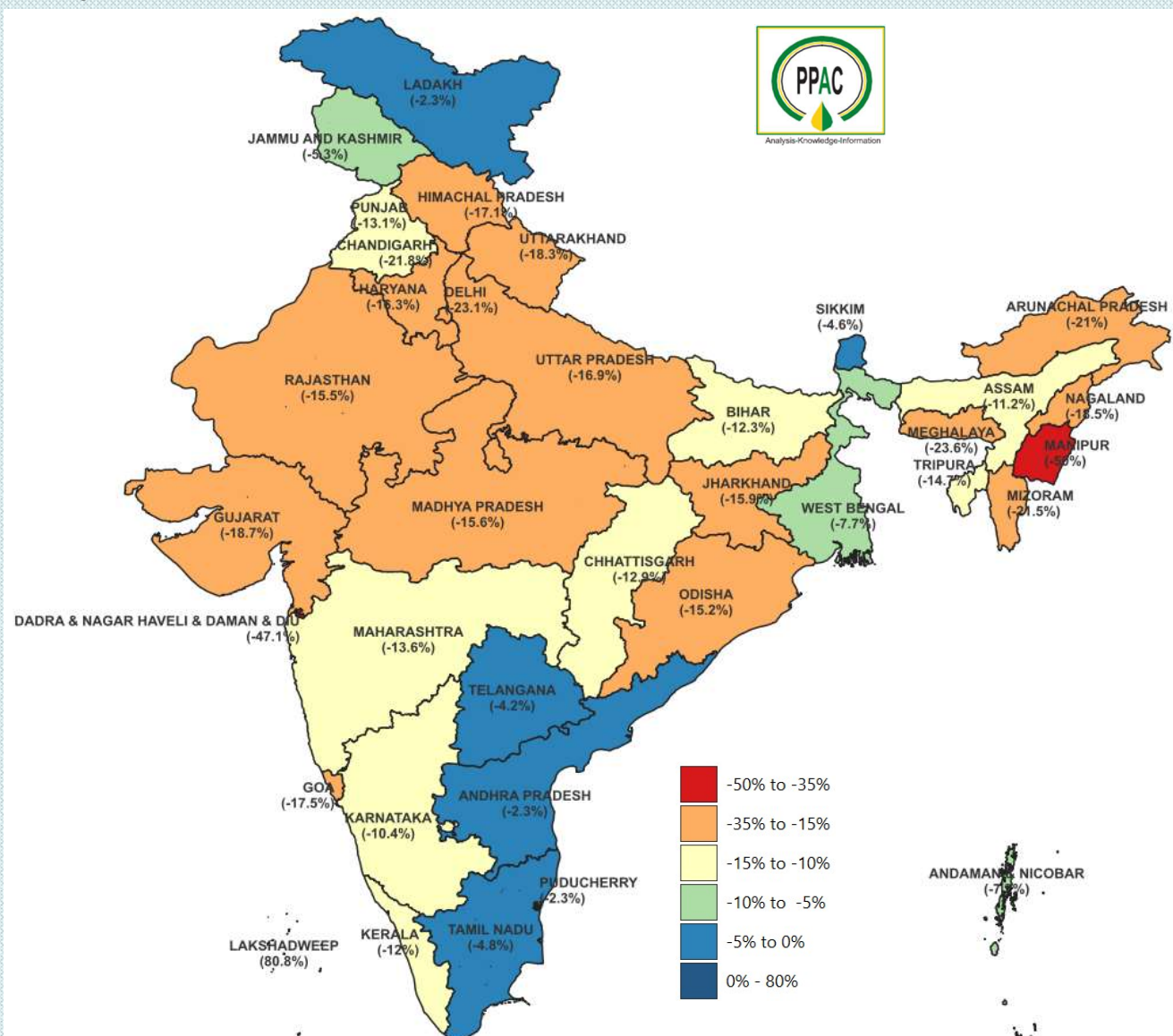
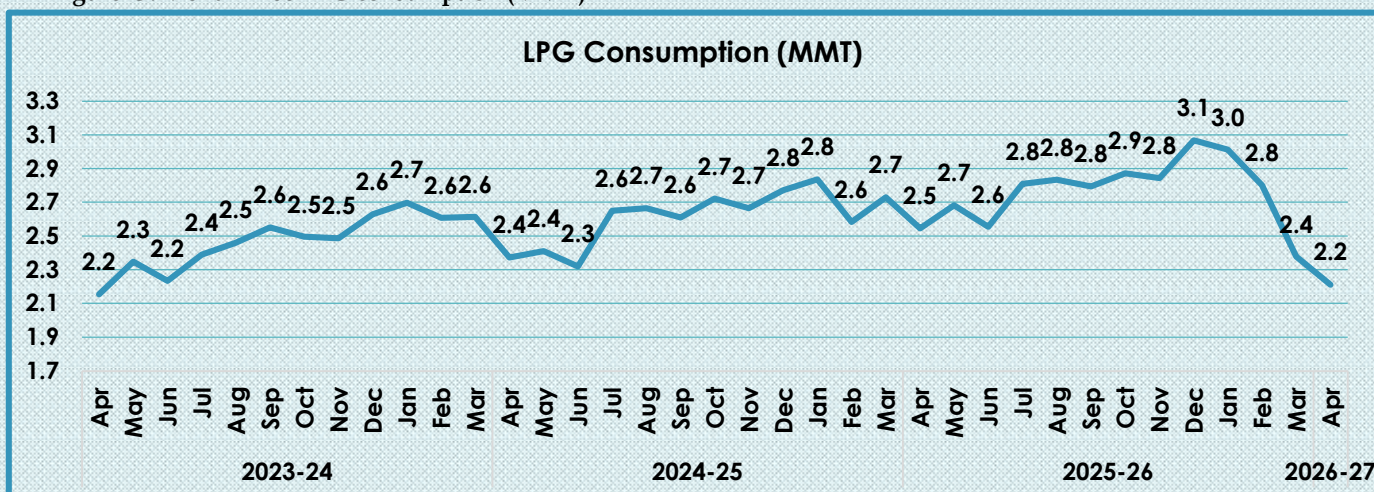


Figure-O: Month-wise LPG consumption (MMT)

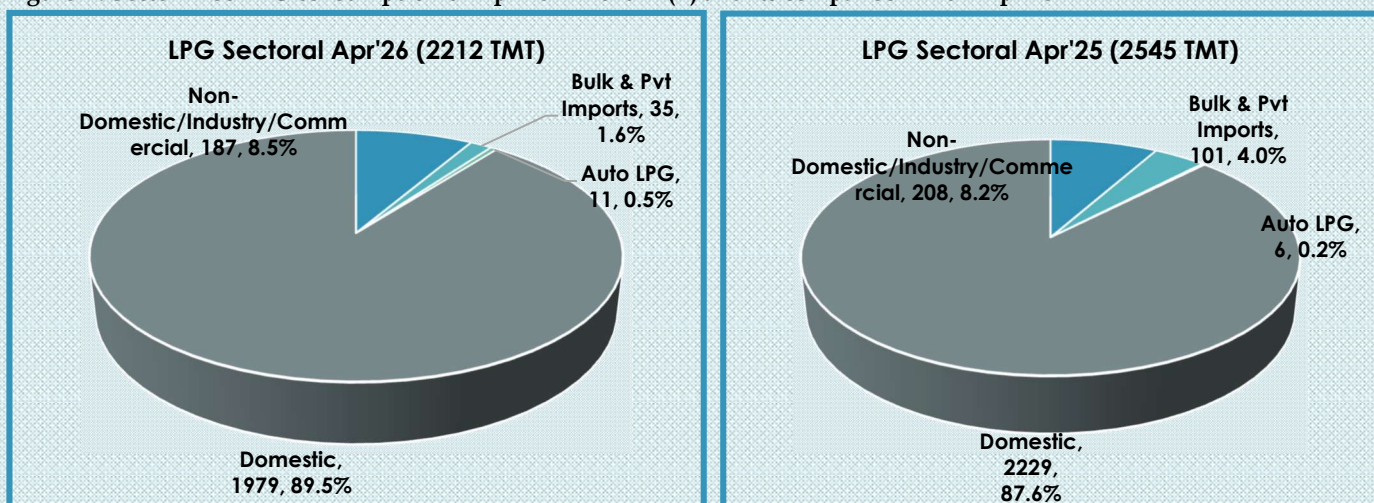


### Sectoral consumption of LPG:

During 'Apr-26, total LPG domestic consumption with a volume of 2.21 MMT registered 13.1% de-growth Year-on-Year basis over the volume of 2.54 MMT in 'Apr-25.

The Sectoral LPG consumption during 'Apr-26', was driven by Domestic packed at 89.5%, followed by LPG 'non-domestic/ industry/ commercial sector 8.5% & Bulk at 1.6%. Auto LPG at 0.5% has been on the negative trajectory getting displaced by CNG.

Figure-P: Sector wise LPG consumption of Apr-26-FY2026-27(P) and its comparison with 'Apr-25



### Naphtha:

Naphtha consumption during Apr 2026 with a volume of 759 TMT registered a de-growth of 18.9%, over a volume of 935 TMT during the month of Apr 2025.

Naphtha market is primarily propelled by robust demand from the petrochemical sector, where it

serves as a key feedstock for plastics and synthetic materials

Naphtha Demand registered degrowth as Import Prices almost Doubled & Domestic Costs Spiked approximately 60% forcing petrochemical producers to suppress demand.

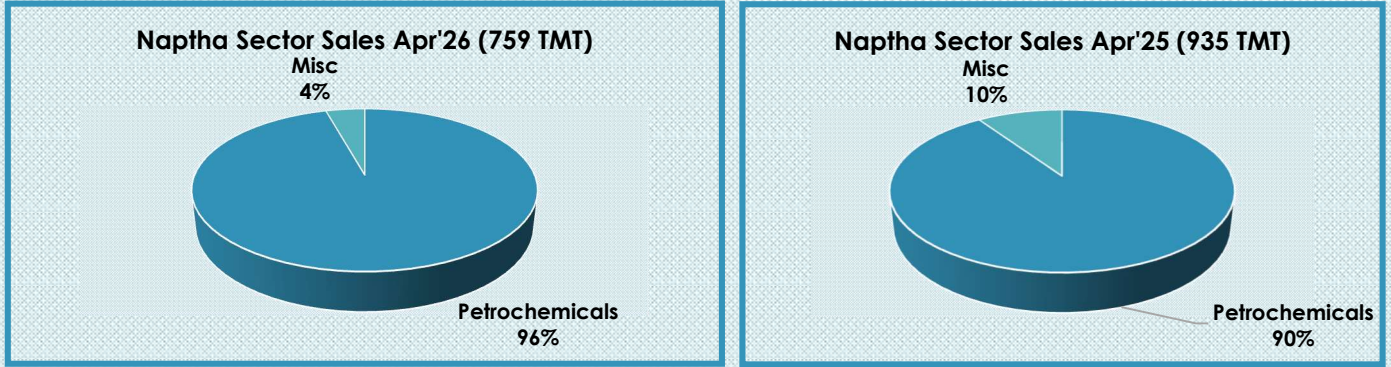
### Sectoral consumption of Naphtha:

During 'Apr-26, total Naphtha domestic consumption with a volume of 759 TMT registered

de-growth of 18.9% Year-on-Year basis over the volume of 935 TMT in 'Apr-25.

96% Consumption of naphtha during this period was driven by petrochemicals sector.

Figure-Q: Sector wise naphtha consumption of 'Apr-26 and its comparison to 'Apr-25



**ATF:**

Aviation Turbine Fuel (ATF) consumption reached 771 TMT and registered a year-on-year decrease of 0.1 % in April 2026 and regained its upward momentum in April.

This de-growth was driven by flight disruptions on account of airspace closures by several countries affecting international flights along with the flight cancellations to the middle east. Suspension of multiple flights on international routes due to high fuel prices also led to degrowth of ATF consumption. Rehabilitation work on the third runway (11R/29L) at Delhi Airport remains a critical factor impacting ATF consumption as of April 2026.

The surge in ATF costs as International ATF prices nearly doubled and Domestic prices increased roughly by a quarter led to significant inflationary pressures on operational costs of airlines.

The operational saturation at legacy Mumbai airport (CSMIA) has redirected regional ATF consumption to newly commissioned Navi Mumbai International Airport (NMIA) leading to ATF growth in the western sector. Net increase of 80 domestic departures per day has been observed at NMIA following its commercial launch on December 25, 2025.

Figure-R: State Wise Growth in ATF month of Apr'2026

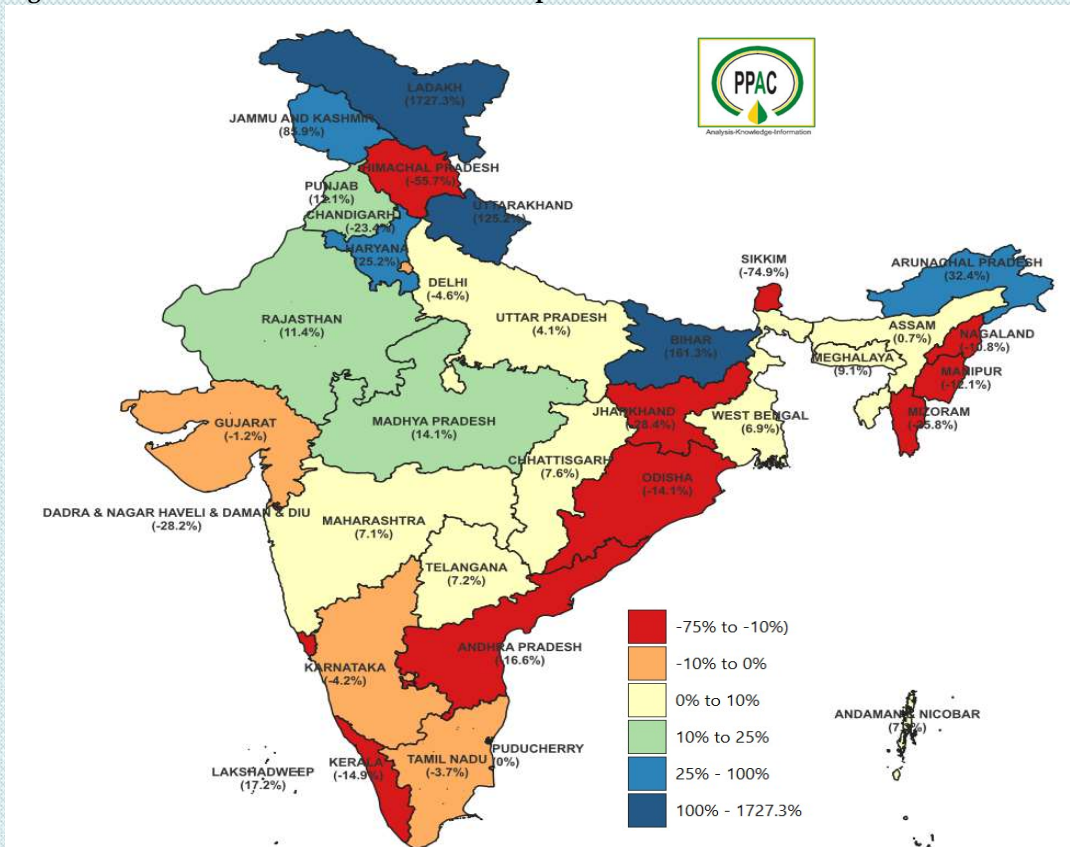
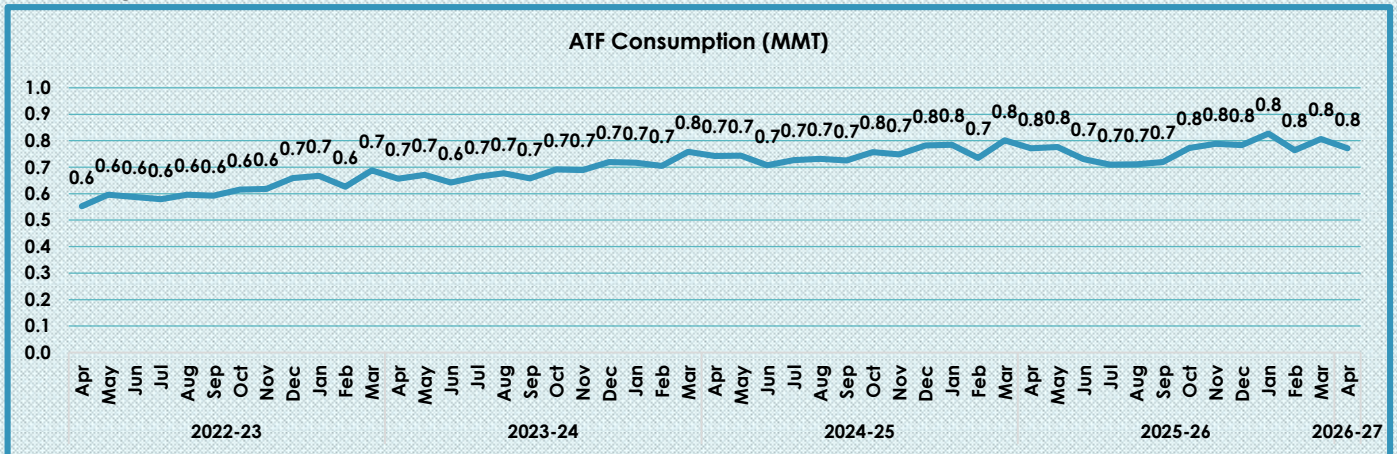


Figure-S: Month-wise ATF consumption (MMT) since Apr 2022

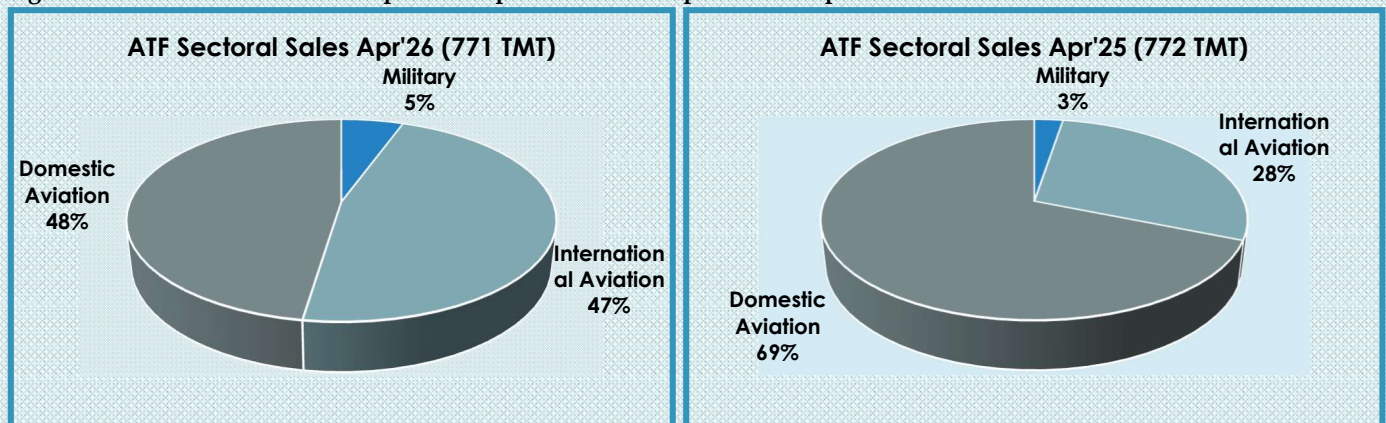


**Sectoral consumption of ATF:**

During 'Apr'26, total ATF domestic consumption with a volume of 771 TMT registered 0.1% de-growth Year-on Year basis over the volume of 772 TMT in 'Apr-25.

Almost entire ATF consumption during 'Apr-26 was attributed to aviation; 48% domestic aviation, 47% international aviation & 5% Military aviation. Details comparisons and YoY analysis are pictorially presented in the following figures, as per the details furnished by OMCs.

Figure-T: Sector wise ATF consumption of Apr-26 and its comparison to 'Apr-25



**Note :** The above sectorisation is not on the basis of tax applicability and is provided by OMCs

- During the month of March 2026, all operational airports (taken together) handled 242.84 thousand aircraft movements (excluding General Aviation Movements), 34.51 million passengers and 343.40 thousand tonnes of freight.
- The International aircraft movements, domestic aircraft movements and total aircraft movements have increased by 3.5%, 0.1% and 0.6% respectively during (April-March) 2025-26 as compared to (April-March) 2024-25.
- The International passengers traffic, domestic passengers and total passenger traffic have increased by 4.2%, 1.4% and 1.9% respectively during the period (April-March) 2025-26 as compared to (April-March) 2024-25.
- The International freight traffic, domestic freight and total freight traffic have increased by 5.4%, 7.4% and 6.2% respectively during the period (April-March) 2025-26 as compared to (April-March) 2024-25.

The table below encapsulates details pertaining to aircraft movements during Mar'26 in the country:

**Table 8A: Details pertaining to aircraft movements during Mar'26 in the country**

CATEGORY	Mar		%
	2025-26	2024-25	CHANGE
<b>Aircraft Movements (in '000)</b>			
International	32.02	40.71	-21.3
Domestic	210.82	216.23	-2.5
Total	242.84	256.94	-5.5
General Aviation	28.65	29.25	-2.1
<b>Grand Total(INTL+DOM+Gen)</b>	<b>271.49</b>	<b>286.19</b>	<b>-5.1</b>

**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:

<b>REGION WISE TRENDS IN AIR TRAFFIC vis-à-vis ATF Consumption</b>								
Mar								
REGION	Mar		Change	REGION	Mar		Change	Difference
	2025-2026	2024-2025			2025-2026	2024-2025		
<b>AIRCRAFT MOVEMENTS ( IN NOS)</b>				<b>ATF CONSUMPTION (IN TMT)</b>				
EASTERN	25529	26580	-4.0%	EASTERN	59	54	7.8%	-11.8%
NORTH EAST	7663	7971	-3.9%	NORTH EAST	15	17	-11.8%	7.9%
NORTHERN	56931	57431	-0.9%	NORTHERN	301	295	2.2%	-3.0%
SOUTHERN	62477	67332	-7.2%	SOUTHERN	223	232	-4.0%	-3.2%
WESTERN	58213	56914	2.3%	WESTERN	209	204	2.8%	-0.5%
<b>Total</b>	<b>210813</b>	<b>216228</b>	<b>-2.5%</b>	<b>Total</b>	<b>806</b>	<b>801</b>	<b>0.7%</b>	<b>-3.2%</b>

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

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

FO/LSHS consumption during April 2026 with a volume of 490 TMT with a de-growth of 0.9 % over the volume of 494 TMT in April-2025.

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

The dominant factor contributing to the decline is the lower demand for bunker fuel due to global

### Sectoral consumption of FO/LSHS:

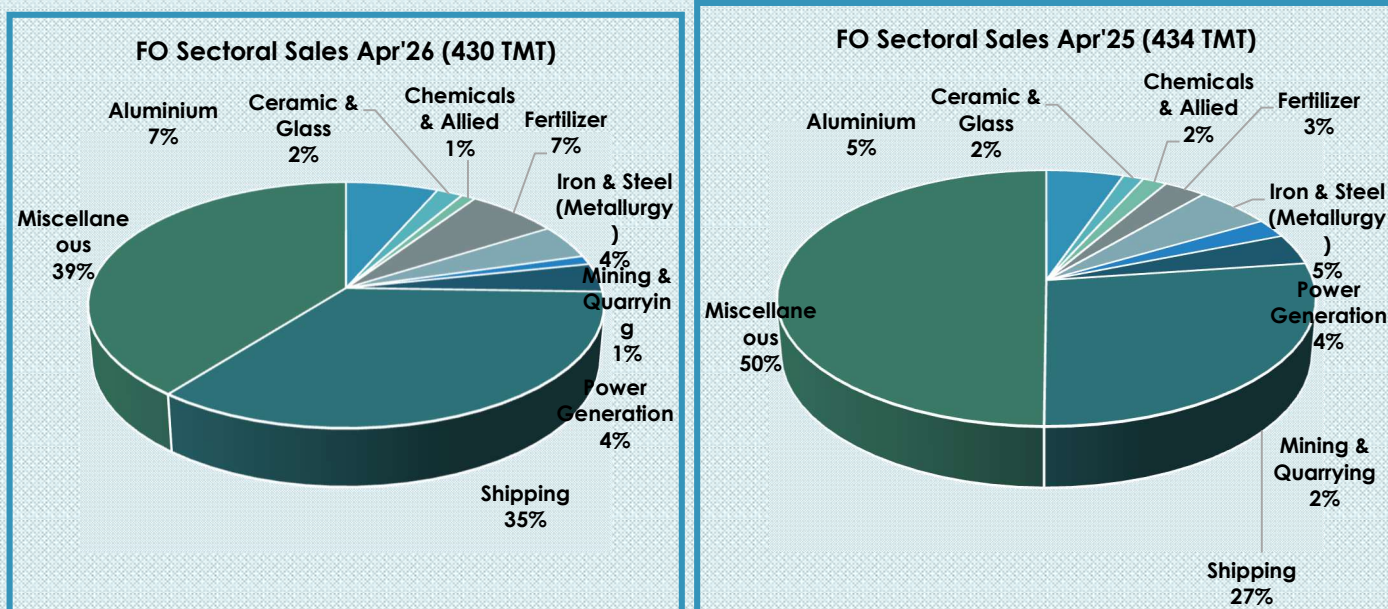
During 'Apr-26, total FO/LSHS consumption with a volume of 490 TMT with a de-growth of 0.9% Year-on Year basis over the volume of 494 TMT in 'Apr-25.

shipping disruptions arising from ongoing geopolitical conflicts. The de-growth in the product is also attributed to consumption shift to lower emission fuels like Natural gas etc due to increased and wider availability of gas coupled with banning of FO in various parts of the country. Some companies shifted their internal fueling consumption from FO to CNG due to environmental obligations

Further Product wise consumption for FO Apr'26 was 430 TMT vs 434 TMT in Apr'25 (0.9% de-growth). For LSHS, Apr'25 was 53 TMT vs 60 TMT in Apr'25 (11.7% De-growth).

Details of YoY comparisons are pictorially presented in the following figure.

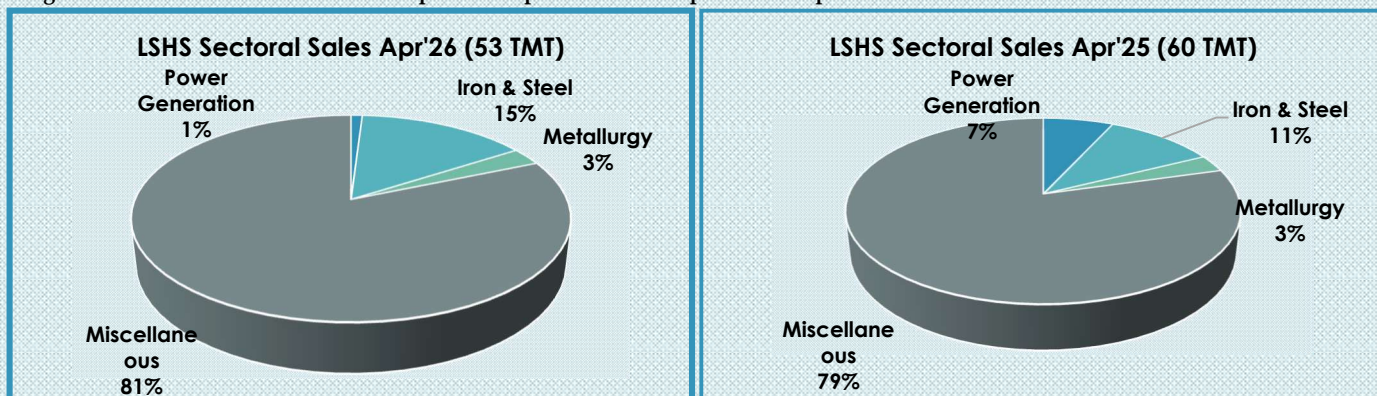
Figure-U: Sector wise FO+LSHS consumption of 'Apr'26 and its comparison to 'Apr'25



Apr'26:- Shipping sector has a share of 35%, up from 27% from previous period, followed by Iron & steel, fertilizer and Aluminium.

Apr'25:- Shipping contributes the highest share with 27% followed by Iron & Steel, Aluminium, Glass, Fertilizer & Power generation.

Figure-V: Sector wise FO+LSHS consumption of 'Apr'26 and its comparison to 'Apr'25



Apr'26: Iron & Steel sector contributed to be the largest sector at 15%, followed by Power Generation 1%

Apr'25: Iron & steel contributes the highest share with 11% followed by Power generation & Metallurgy

**Petcoke:**

Petcoke consumption during the month of Apr 2026 with a volume of 1.51 MMT and de-growth of 3.6% over the volume of 1.56 MMT in the same period last year.

The Directorate General of Foreign Trade (DGFT) maintained strict allocation procedures and quantitative limits for the import of Raw Petroleum

**Sectoral consumption of Petcoke:**

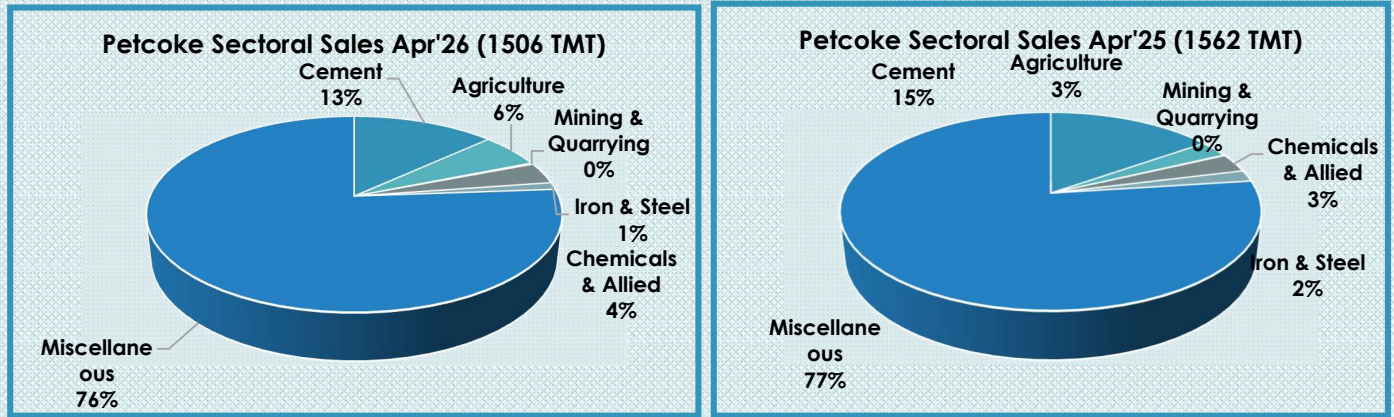
During 'Apr-26', total Petcoke cumulative domestic consumption with a volume of 1.51 MMT registered

Coke (RPC) for the 2026-27 financial year, capping the potential volume of imports.

Various factors are attributed to Petcoke consumption trend: Petcoke consumption faced a significant decline by private importers as international prices remained firm. This led the cement sector to shift toward domestic thermal coal, which became more cost-effective.

3.6% de-growth Year-on Year basis over the volume of 1.56 MMT in 'Apr-25'. The cement sector continues to occupy the largest share in 'Apr-26' (P) at 13%, followed by other Industries.

Figure-W: Sector wise Petcoke consumption of 'Apr'25 and its comparison to 'Apr'25



Apr'26:- Cement industry occupied the highest share at 13%

Apr'25:- Cement industry occupied the highest share at 15%, followed by other sectors.

### Light Diesel Oil

LDO consumption during the month April 2026 with a volume of 45 TMT registered a 47.0% growth over the volume of 86 TMT in Apr 2025.

April 2026 LDO consumption growth was attributed to following reasons: The most significant

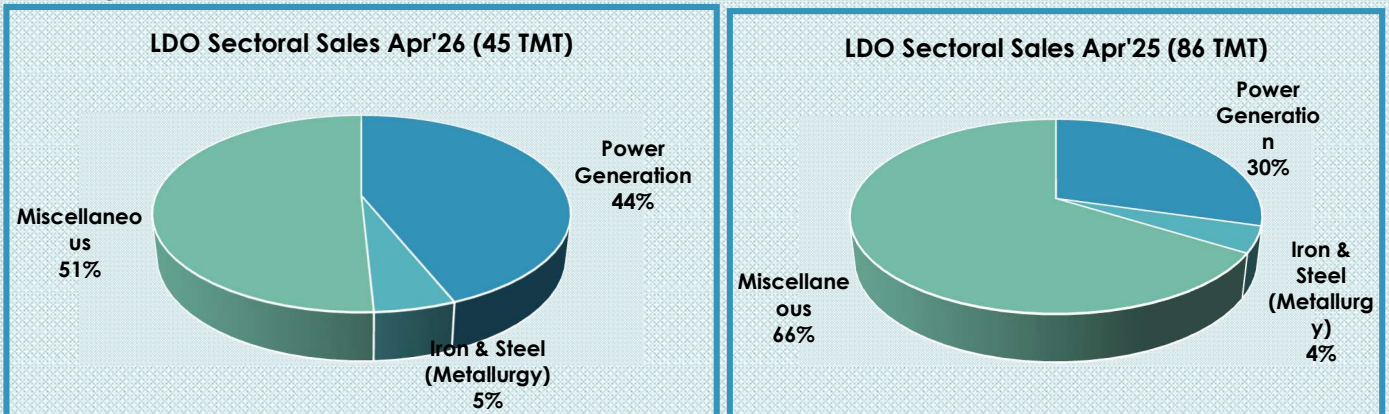
driver is the mandatory transition away from Furnace Oil (FO) due to environmental bans in critically polluted areas and the National Capital Region (NCR). LDO has become the primary "cleaner" liquid fuel alternative for industrial boilers and heaters.

### Sectoral consumption of Light Diesel Oil:

During 'Apr-25, total LDO domestic consumption with a volume of 45 TMT registered a 47.0% de-growth Year-on Year basis over the volume of 86 TMT in 'Apr-25.

The cumulative consumption of Light Diesel oil (LDO) during 'Apr-26' was driven by 'Power Generation' 44% followed by Iron & Steel at 5%.

Figure-X: Sector wise LDO consumption of 'Apr-26 and its comparison to Apr-25



Apr-26:-Power Generation occupied a 44% share of the product followed by Iron & Steel & Misc industries

Apr-25:-Power Generation occupied a 30% share of 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 to the NG report published by PPAC.

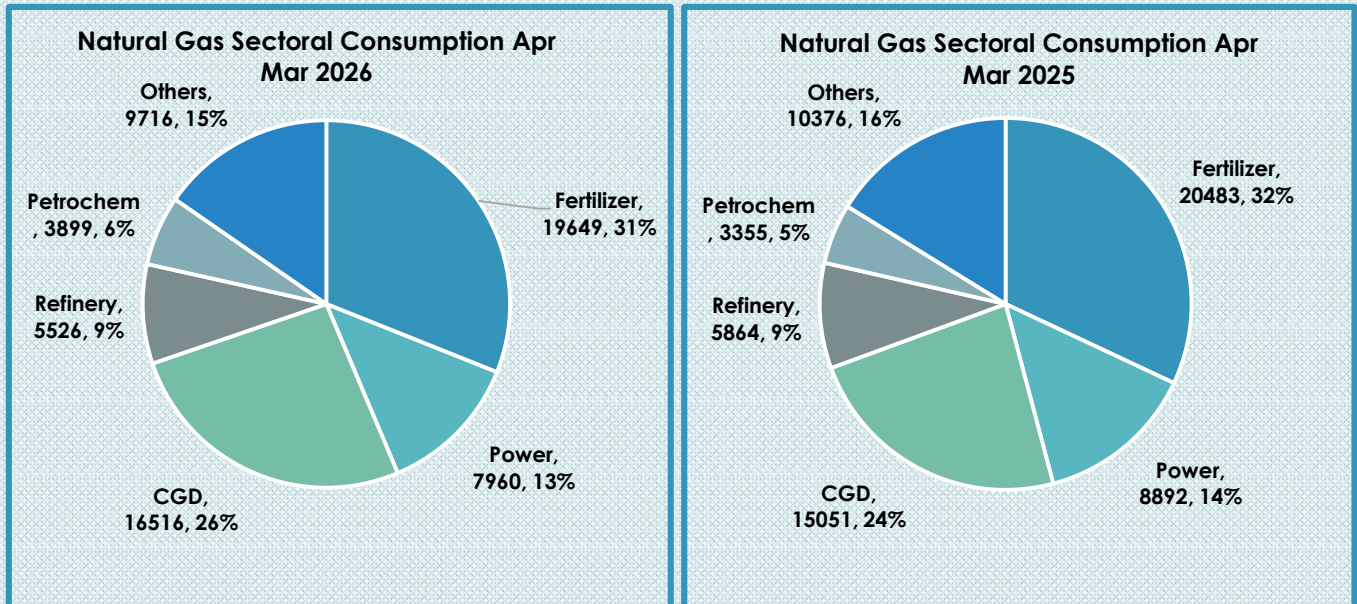
Total Natural Gas Consumption (including internal consumption) for the month of April 2026 (P) was 4703 MMSCM which was 16.7%

lower than the corresponding month of the previous year.

Sectoral consumption of Natural Gas consumption of 'Apr-Mar'26 & its comparison to 'Apr-Mar'25 (P): During Apr-Mar'26, total Natural Gas monthly domestic consumption with a volume of 63,266 MMSCM, over the volume of 64,021 MMSCM during the same period in the preceding year. During Apr-Mar'26, consumption of Natural gas (NG) was driven by fertilizer (31%) followed by CGD (26%), Power (13%) Refinery (9%), Petrochemicals (6%). Misc sectors occupied a share of 15% in Apr-Mar2026.

As per IGX, Indian Natural Gas average spot purchase price for the month of April 2026 was 16.9 \$/MMBtu.

Figure-Y: Sector wise consumption of Natural Gas of Apr-Mar 2026 and its comparison to Apr-Mar 2025



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

P: provisional

**Apr-Mar'2026** Fertilizer sector occupied the highest share for the Consumption of Natural Gas at 31% with the share of CGD increasing steadily.

**Apr-Mar'2025** 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 2025-26 (Provisional)												
('000 MT)												
Product	April-March 2025-26			April								
	FY2024-25	FY2025-26	Growth(%)_2025-26 over 2024-25	2022	2023	2024	2025	2026	Growth(%)_2026 over 2022	Growth(%)_2026 over 2023	Growth(%)_2026 over 2024	Growth(%)_2026 over 2025
<b>(A) Sensitive Products</b>												
LPG	2545	2212	-13.1	2157	2154	2373	2545	2212	2.5	2.7	-6.8	-13.1
SKO	26	28	9.7	72	30	27	26	28	-60.9	-6.9	5.7	9.7
<b>Sub Total</b>	<b>2570</b>	<b>2240</b>	<b>-12.9</b>	<b>2230</b>	<b>2185</b>	<b>2400</b>	<b>2570</b>	<b>2240</b>	<b>0.5</b>	<b>2.5</b>	<b>-6.7</b>	<b>-12.9</b>
<b>(B) Major Decontrolled Product</b>												
HSD	8261	8332	0.9	7199	7818	7925	8261	8332	15.7	6.6	5.1	0.9
MS	3449	3684	6.8	2797	2877	3285	3449	3684	31.7	28.0	12.2	6.8
Naphtha	935	759	-18.9	974	1113	1217	935	759	-22.0	-31.8	-37.6	-18.9
ATF	772	771	-0.1	553	656	742	772	771	39.5	17.6	3.9	-0.1
Bitumen	862	598	-30.6	801	878	835	862	598	-25.3	-31.8	-28.4	-30.6
FO & LSHS	494	490	-0.9	522	585	532	494	490	-6.1	-16.2	-7.9	-0.9
Lubricants & Greases	398	361	-9.4	318	274	375	398	361	13.4	31.9	-3.8	-9.4
LDO	86	45	-47.0	52	61	51	86	45	-13.1	-25.4	-11.1	-47.0
<b>Sub Total</b>	<b>15258</b>	<b>15040</b>	<b>-1.4</b>	<b>13216</b>	<b>14261</b>	<b>14962</b>	<b>15258</b>	<b>15040</b>	<b>13.8</b>	<b>5.5</b>	<b>0.5</b>	<b>-1.4</b>
<b>Sub - Total (A) + (B)</b>	<b>17829</b>	<b>17280</b>	<b>-3.1</b>	<b>15446</b>	<b>16446</b>	<b>17362</b>	<b>17829</b>	<b>17280</b>	<b>11.9</b>	<b>5.1</b>	<b>-0.5</b>	<b>-3.1</b>
<b>(C) Other Minor Decontrolled Products</b>												
Petroleum coke	1562	1506	-3.6	1726	1379	1805	1562	1506	-12.8	9.2	-16.6	-3.6
Others	837	509	-39.2	1283	883	996	837	509	-60.3	-42.4	-48.9	-39.2
<b>Sub Total</b>	<b>2399</b>	<b>2015</b>	<b>-16.0</b>	<b>3009</b>	<b>2262</b>	<b>2801</b>	<b>2399</b>	<b>2015</b>	<b>-33.0</b>	<b>-10.9</b>	<b>-28.1</b>	<b>-16.0</b>
<b>Total</b>	<b>20227</b>	<b>19295</b>	<b>-4.6</b>	<b>18455</b>	<b>18708</b>	<b>20163</b>	<b>20227</b>	<b>19295</b>	<b>4.6</b>	<b>3.1</b>	<b>-4.3</b>	<b>-4.6</b>

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

**Table-11**

Industry Consumption Trend Analysis 2025-26 (Provisional)												
('Million Barrels per Day)												
Product	April-March 2025-26			April								
	FY2024-25	FY2025-26	Growth(%)_2025-26 over 2024-25	2022	2023	2024	2025	2026	Growth(%)_2026 over 2022	Growth(%)_2026 over 2023	Growth(%)_2026 over 2024	Growth(%)_2026 over 2025
<b>(A) Sensitive Products</b>												
LPG	0.98	0.86	-13.1%	0.83	0.83	0.92	0.98	0.86	2.5%	2.7%	-6.8%	-13.1%
SKO	0.01	0.0076	9.7%	0.02	0.01	0.01	0.01	0.01	-60.9%	-6.9%	5.7%	9.7%
Sub Total	1.0	0.9	-12.9%	0.9	0.8	0.9	1.0	0.9	1.1%	2.6%	-6.7%	-12.9%
<b>(B) Major Decontrolled Product</b>												
HSD	2.10	2.11	0.9%	1.83	1.98	2.01	2.10	2.11	15.7%	6.6%	5.1%	0.9%
MS	1.02	1.09	6.8%	0.83	0.85	0.97	1.02	1.09	31.7%	28.0%	12.2%	6.8%
Naphtha	0.27	0.22	-18.9%	0.28	0.32	0.35	0.27	0.22	-22.0%	-31.8%	-37.6%	-18.9%
ATF	0.21	0.21	-0.1%	0.15	0.18	0.20	0.21	0.21	39.5%	17.6%	3.9%	-0.1%
Bitumen	0.17	0.12	-30.6%	0.16	0.18	0.17	0.17	0.12	-25.3%	-31.8%	-28.4%	-30.6%
FO & LSHS	0.11	0.11	-0.9%	0.12	0.13	0.12	0.11	0.11	-6.1%	-16.2%	-7.9%	-0.9%
Lubricants & Greases	0.10	0.09	-9.4%	0.08	0.07	0.09	0.10	0.09	13.4%	31.9%	-3.8%	-9.4%
LDO	0.02	0.01	-47.0%	0.01	0.01	0.01	0.02	0.01	-13.1%	-25.4%	-11.1%	-47.0%
Sub Total	4.0	4.0	-0.9%	3.5	3.7	3.9	4.0	4.0	14.7%	6.4%	0.9%	-0.9%
Sub - Total (A) + (B)	5.0	4.8	-3.3%	4.3	4.6	4.9	5.0	4.8	12.0%	5.7%	-0.6%	-3.3%
<b>(C) Other Minor Decontrolled Products</b>												
Petroleum coke	0.29	0.28	-3.6%	0.32	0.25	0.33	0.29	0.28	-12.8%	9.2%	-16.6%	-3.6%
Others	0.22	0.14	-39.2%	0.34	0.24	0.27	0.22	0.14	-60.3%	-42.4%	-48.9%	-39.2%
Sub Total	0.5	0.4	-19.2%	0.7	0.5	0.6	0.5	0.4	-37.5%	-15.7%	-31.0%	-19.2%
Total	5.5	5.24	-4.8%	5.0	5.1	5.5	5.5	5.2	5.4%	3.6%	-3.9%	-4.8%

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



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