

INDUSTRY CONSUMPTION REPORT POL & NG
May 2026

Contents

Highlights on Industry Consumption-POL & NG, May'2026	6
Petrol/Motor Spirit (MS):	9
Factors impacting consumption of MS:	11
High Speed Diesel (HSD):	11
Factors impacting consumption of HSD:	13
Kerosene:	17
Bitumen:	18
LPG:	19
Naphtha:	21
ATF:	22
Furnace oil & Low sulphur heavy stock (FO/LSHS):	24
Petcoke:	25
Light Diesel Oil:	25
NG	26



List of Tables

Table-1: Consumption data of Petroleum Products (M-O-M Comparison and Y-O-Y Comparison)	8
Table-2: Passenger cars & Utility vehicles sales in the month of May 2026 (Primary sales data)	11
Table-3: Two & Three Wheelers vehicle sales in the month of May & YoY comparison (Primary sales data)	11
Table-4: Domestic commercial vehicles & tractors sales with YoY comparison (Secondary sales data)	15
Table-5: Details of the Total E-Way Generated in CY vis-a-vis LY:	15
Table-6: Cargo handled at major ports in Apr-May 2026 (Qty in TMT) Source: ipa.nic.in	15
Table-7: Power availability vs requirement for current & previous period (upto Apr-May 2026)	16
Table 8A: Details pertaining to aircraft movements during Apr'26 in the country	23
Table 8B: Region's wise trends in air traffic vis-à-vis ATF Consumption recorded at PPAC	24
Table-9: Conversion factors taken for MT to barrel conversion	27
Table-10 Industry Consumption Trend Analysis (Provisional) in MMT	28
Table-11 Industry Consumption Trend Analysis (Provisional) in Mbpd	29

List of Figures

Figure-A: Monthly POL consumption (MMT) since April 2021 to till date	9
Figure-B: POL consumption & Growth rate YoY basis	9
Figure-C: State Wise Growth in MS month of May-2026	10
Figure-D: Month wise MS consumption volume (MMT) since April- 2022 to till date	10
Figure-E: State Wise Growth in HSD month of May-2026	12
Figure-F: Month-wise HSD consumption (MMT) since April 2022 to till date	12
Figure-G: Share of Retail & Direct business (%) in Diesel consumption	13
Figure-H: Sub-Division Rainfall Map for May 2026	14
Figure-I(I): Customer Segment-wise HSD consumption (Retail Vs Direct) of YoY comparison	16
Figure-I(II): Sector-wise HSD consumption (Direct Sales) of YoY comparison	17
Figure-J: Month-wise PDS & other-SKO consumption in share (%) since April 2022 to till date	17
Figure-K: *Other SKO: non-subsidized PDS SKO +non-PDS kerosene	18
Figure-L: SKO' sales YoY comparison	18
Figure-M: Month-wise Bitumen consumption (MMT)	19
Figure-N: State Wise Growth in LPG month of May-2026	20
Figure-O: Month-wise LPG consumption (MMT)	20
Figure-P: Sector wise LPG consumption of YoY comparison	21
Figure-Q: Sector wise naphtha consumption of 'Y-O-Y Comparison	21
Figure-R: State Wise Growth in ATF month of May-2026	22
Figure-S: Month-wise ATF consumption (MMT)	23
Figure-T: Sector wise ATF consumption of comparison YoY	23
Figure-U: Sector wise FO+LSHS consumption of YoY comparison	24
Figure-V: Sector wise FO+LSHS consumption of YoY comparison	25
Figure-W: Sector wise Petcoke consumption of YoY comparison	25
Figure-X: Sector wise LDO consumption of YoY comparison	26
Figure-Y: Sector wise consumption of Natural Gas of YoY comparison	27

CIRCULATION:

पेट्रोलियम और प्राकृतिक गैस मंत्रालय:	MoP&NG:
<p>निजी सचिव- माननीय मंत्री - (पेट्रोलियम और प्राकृतिक गैस) ओ एस डी- माननीय मंत्री - (पेट्रोलियम और प्राकृतिक गैस) निजी सचिव- माननीय राज्य मंत्री - (पेट्रोलियम और प्राकृतिक गैस) सचिव, पीएनजी अपर सचिव, पीएनजी अपर सचिव एवं वित्त सलाहकार संयुक्त सचिव (रिफाइनरी व मार्केटिंग) संयुक्त सचिव (एक्सप्लोरेशन व बायो रिफाइनरी) संयुक्त सचिव (जीपी) संयुक्त सचिव (जी) उप महानिदेशक, (इ एवं एस) संयुक्त सचिव (आईएफडी) संयुक्त सचिव (आईसी)</p> <p>डी जी एच: महानिदेशक (डी जी एच) ओ आई डी बी : सचिव (ओ आई डी बी) नीति आयोग: सलाहकार (ऊर्जा), नीति आयोग</p> <p>उद्योग: अध्यक्ष, आईओसी, / ओएनजीसी, नई दिल्ली अध्यक्ष एवं प्रबंधक निदेशक- बीपीसी/एचपीसी/गेल निदेशक (मार्के.), आईओसी/ बीपीसी/ एचपीसी/ गेल प्रेजिडेंट, आरआईएल / एमडी और सीईओ, एच एम ई एल / सीईओ (मार्के.) नयारा एनर्जी महानिदेशक, फिपी प्रबंध निदेशक-एनआरएल, गुवाहाटी/सीपीसीएल, चेन्नई/एमआरपीएल, मंगलुरु ओएमसी योजना एवं रिटेल ग्रुप - एचओ</p>	<p>PS to Hon'ble Minister (P&NG) OSD to Hon'ble Minister (P&NG) PS to Hon'ble Minister of State (P&NG) Secretary, P&NG Additional Secretary, P&NG Additional Secretary & Financial Advisor Jt. Secretary (Refinery & Marketing) Jt. Secretary (Exploration & Biorefinery) Jt. Secretary (GP) Jt. Secretary (G) Deputy Director General (E&S) Jt. Secretary (IFD) Jt. Secretary (International Cooperation) DGH: DG, DGH OIDB: Secretary (OIDB) NITI Aayog: Advisor (Energy), NITI Aayog Industry: Chairman, IOC / ONGC New Delhi C&MD - BPC / HPC / GAIL Director (Mkt.), IOC/ BPC / HPC /GAIL President - RIL, MD & CEO - HMEL, CEO (Mktg.) - Nayara Energy DG, FIPI MD- NRL, Guwahati/ CPCL, Chennai/ MRPL, Mangalore OMCs Planning & Retail Groups - HO</p>

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Subject: Industry Consumption Review Report of PPAC: May 2026

The monthly Petroleum Industry Consumption Review Report has been prepared by the Petroleum Planning and Analysis Cell (PPAC) for the month of May 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 K. Navin Charan-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

धन्यवाद,

Thanking you,

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Highlights of the month: May-2026

- Following multiple regulatory extensions, the final bid submission deadline for the massive **10th round of the Open Acreage Licensing Policy (OALP-X)** officially closed on **May 29, 2026**. This monumental round put up **25 blocks covering nearly 1,92,000 sq km** across 13 sedimentary basins, highlighting 12 highly anticipated ultra-deepwater blocks, including blocks in the hydrocarbon-potential Andaman basin.
- ONGC picks BP as tech partner for Western Offshore fields, BP already has a similar arrangement for ONGC's flagship Mumbai High fields, making it responsible for helping enhance output from fields that account for about 72% of ONGC's gas production and 60% of its oil output
- **OIL reported 2 major discoveries** : (i) Natural Gas discovery in 3rd exploratory well in Andaman Shallow offshore block at a water depth of 355 Meter and (ii) Unlocking of a new Gas bearing pay zone in Rajasthan's Dandewala field at a depth of 950 Meter with a flow ~ 25000 SCMD
- Bureau of Indian Standards (BIS) has notified specifications for E22, E25, E27 & E30 fuel blends to study the feasibility of usage in positive ignition powered engine vehicles.
- Oil and National Gas Corporation (ONGC) has reported drilling to a depth of 1000 meters for a geothermal project at the Puga Valley in Ladakh, India. The company had also received approval for a five-year extension for the project, with a revised plan of establishing a 1-MWe pilot geothermal power plant and preparing recommendations for larger-scale commercial development.
- On **May 13, 2026**, the Board of Oil India approved a major Joint Venture Agreement between its wholly-owned subsidiary, **OIL Green Energy**, and **Hindustan Waste Treatment Private Limited (HWTPL)**. The newly formed Joint Venture Company (JVC) will serve as the primary execution vehicle to develop, implement, and operate Compressed Biogas (CBG) projects across the country
- India's gross GST collections increased by 3.2% year-on-year to over ₹1.94 lakh crore in May 2026, driven by higher domestic supplies of goods and services and continued growth in GST revenues from imports.
- India's total vehicle retail sales recorded a steady year-on-year (YoY) growth of **9.55%** in May 2026, reaching **25.31 lakh units** (compared to 23.10 lakh units in May 2025). This performance marked the **best-ever May in history** for the overall industry, despite extreme heatwaves and fuel-price pressures during the month.
- India's Manufacturing Purchasing Managers' Index (PMI) climbed further to **55.0** in May 2026, up from 54.7 in April. This three-month high indicated a robust expansion in factory activity, heavily supported by stronger domestic market demand, infrastructure spending, and new business wins.
- India's retail inflation (CPI) rose to a provisional **3.93%** in May 2026, up from 3.48% in April. This marked the fifth consecutive month of gradual increases.

SUMMARY OF PRODUCT WISE POL

1. The consumption of petroleum products in May 2026 with a volume of 19.93 MMT registered a de-growth of 6.5% against the historical of 21.31 MMT in May 2025.
2. MS (Petrol) consumption during the month of May 2026 with a volume of 3.91 MMT (1.11 mbpd) recorded a growth of 19.6% on the volume of 3.78 MMT (1.05 mbpd) in May 2025.
3. Ethanol blending in Petrol was 20.0% during May'26 and cumulative ethanol blending during November 2025- May'2026 was 20.0%.
4. The Domestic Sale of Passenger Vehicles in May 2026 with a volume of 4.03 lacs registered a healthy growth of 23.2% over May 2025, as per FADA.
5. HSD (Diesel) consumption during the month of May 2026 with a volume of 8.73 MMT (2.13 mbpd) registered growth of 1.6% over the volume of 8.259 MMT (2.10 mbpd) in the month of May 2025.
6. LPG consumption during the month of May 2026 with a volume of 2.13 MMT registering a de-growth of 20.5% over the volume of 2.68 MMT in May 2025.
7. ATF consumption during May 2026 with a volume of 783 TMT continued to register a growth of 0.9%, over a volume of 776 TMT during the month of May 2025.
8. Bitumen consumption during May 2026 with a volume of 519 TMT registered a de-growth of 39.4% over the volume of 857 TMT in the month of May 2025.
9. Kerosene (SKO) consumption with a volume of 32 TMT registered a de-growth of 17.8% in May 2026 as compared to May 2025. SKO consumption during the month is largely constituted by PDS category with a 73% share.
10. Total Natural Gas Consumption (including internal consumption) for the month of May 2026 (P) was 5061 MMSCM which was 12.87% lower than the corresponding month of the previous year.
11. As on 30th May 2026, number of active LPG domestic connections are 33.31 cr and PMUY connections 10.57 cr.



This report analyses the trend of consumption of petroleum products in the country during the month of May 2026. Data on product-wise monthly consumption of petroleum products for May 2026 is uploaded on the PPAC website (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.

The growth percentage in consumption of petroleum products, category-wise, for the month of May 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-May 2026								
Product	May (TMT)				April-March (TMT)			
	2025	2026	% share of May'26	Growth (%)	2025-26	2026-27	Growth (%)	% share of Apr-Mar'27
(A) Sensitive Products								
LPG	2682	2132	10.7	↓ -20.5	5226	4342	↓ -16.9	11.0
SKO	39	32	0.2	↓ -17.8	64	60	↓ -6.8	0.2
Sub Total	2720	2164	10.9	-20.4	5291	4402	-16.8	11.2
(B) Major Decontrolled Product								
HSD	8592	8728	43.8	↑ 1.6	16853	17059	↑ 1.2	43.3
MS*	3782	3910	19.6	↑ 3.4	7232	7594	↑ 5.0	19.3
Naphtha	945	667	3.3	↓ -29.4	1880	1429	↓ -24.0	3.6
ATF	776	783	3.9	↑ 0.9	1548	1554	↑ 0.4	3.9
Bitumen	857	519	2.6	↓ -39.4	1719	1099	↓ -36.1	2.8
FO/LSHS	504	625	3.1	↑ 24.0	999	1111	↑ 11.3	2.8
Lubes+Greases	364	382	1.9	↑ 5.0	762	743	↓ -2.5	1.9
LDO	81	47	0.2	↓ -42.7	167	92	↓ -44.9	0.2
Sub Total	15901	15659	78.6	-1.5	31159	30682	-1.5	77.9
(C) Other Minor Decontrolled Products								
Pet.Coke	1810	1604	8.0	↓ -11.4	3372	3276	↓ -2.8	8.3
Others*	874	502	2.5	↓ -42.6	1712	1037	↓ -39.4	2.6
Sub Total	2685	2106	10.6	-21.6	5083	4313	-15.2	10.9
Total	21306	19930	100	-6.5	41533	39397	-5.1	100

*Others include sulfur, propylene, propane, reformat, L.A.B.F.S, CBFS, butane, MTO etc. **MS Sales includes Ethanol Blending**

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

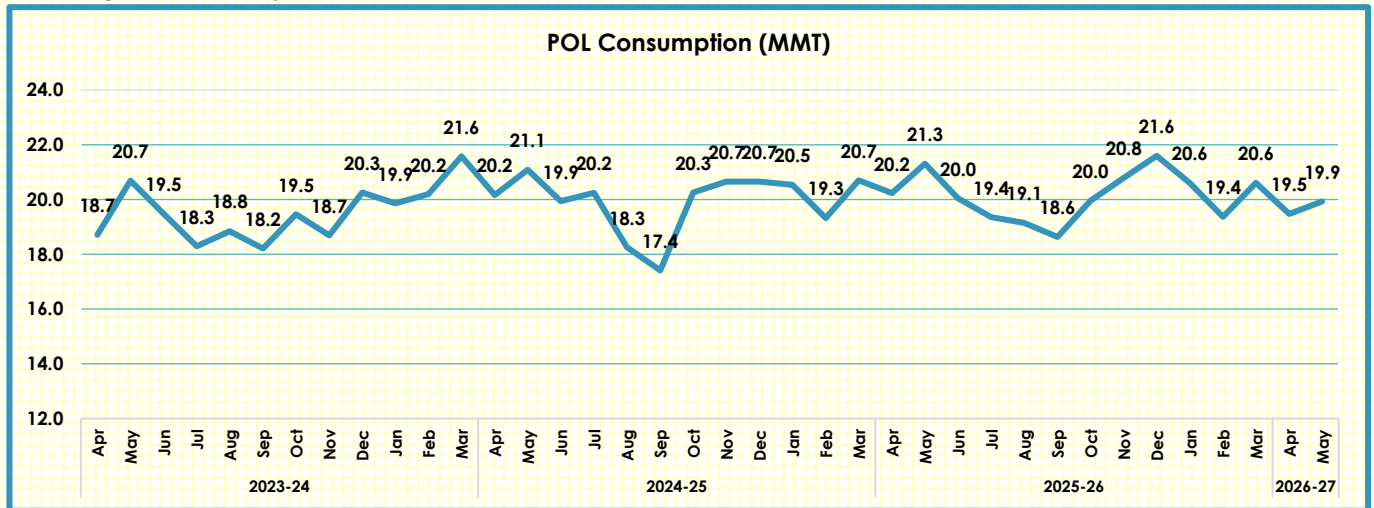
(c) MS Sales includes Ethanol Blending .

India's petroleum product consumption in May 2026 was 19.93 million metric tonnes with 6.5% de-growth over May 2025. The consumption was primarily driven by higher demand for MS at 3.4% and HSD at 1.6%. The de-growth in POL consumption was driven by de-growth in Bitumen, Naptha & LPG owing to price volatility, supply constraints on account of the geo-political situation.

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.

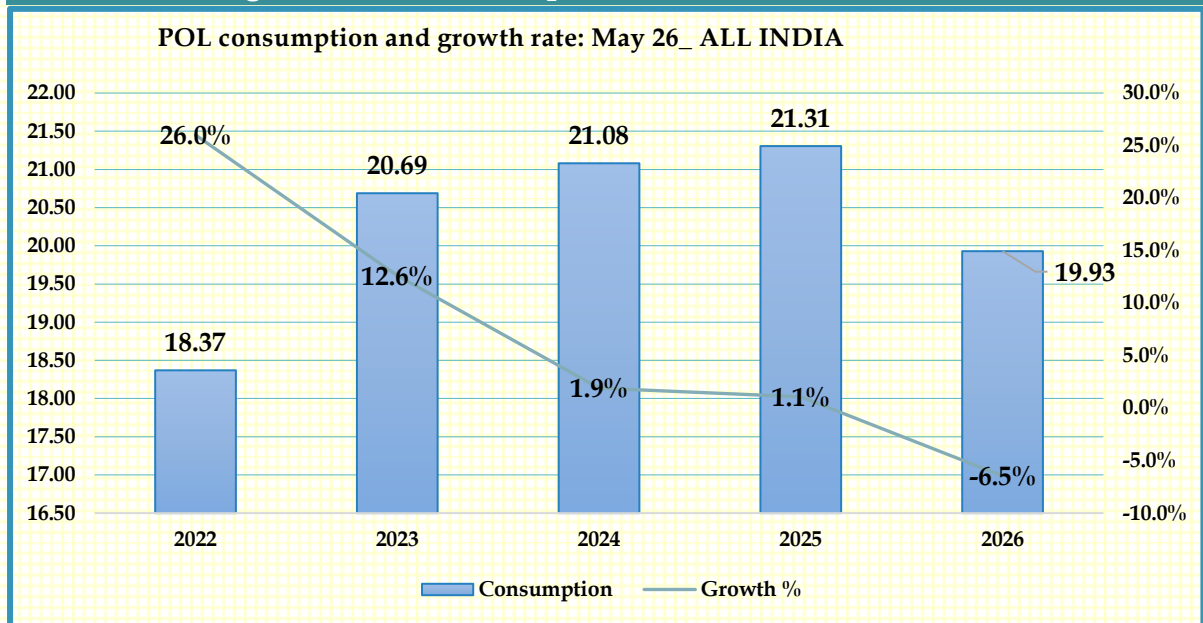
Figure-A: Monthly POL consumption (MMT) since April 2023



✓ The overall POL domestic consumption profile of the May 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 May 2026 with a volume of 3.91 MMT recorded a growth of 3.4% on the volume of 3.78 MMT in May 2025.

PSU's registered a growth rate of 5.2% as against 13.1% decrease by their private sector counterparts in May-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 segment growing by 23.25% and 2W by 7.54% in May 26.
- The growth is driven by Migrant workforce, higher personal mobility, start of the tourism season coupled with seasonal wedding demand. The sustained increase reflects continued expansion in private mobility and higher vehicle ownership in the country.

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

May'26			
Vehicle Segment	2025	2026	Growth %age
Total PV	326,656	402,591	23.2%

Source: FADA

Two-Wheeler Sales:

Two-wheeler sales in May 2026 with a volume of 18.46 lacs registered a robust 7.5% growth, YoY basis over volume of 17.16 lacs during May 2025.

Three-Wheeler sales

Three-wheeler domestic sales in May 2026 with a volume of 1.11 lac recorded a growth of 3.6 %, YoY basis over the volume of 1.07 lacs in May 2025

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

CATEGORY	May 25	May 26	Growth %
2W	1,715,581	1,844,947	7.5%
Passenger Carrier-3 W	48,206	60,643	25.8%
Goods Carrier-3 W	10,766	13,482	25.2%
E-Rickshaw	40,619	29,812	-26.6%
E-cart	7,961	7,487	-6.0%
Total Three Wheelers	107,552	111,424	3.6%

Source: FADA

High Speed Diesel (HSD):

HSD (Diesel) consumption during the month of May 2026 with a volume of 8.73 MMT, registered a modest growth of 1.6% on the volume of 8.59 MMT in the month of May 2025.

PSUs registered a 6.9% growth and private sector witnessed 34.7% de-growth in the month of May-26.

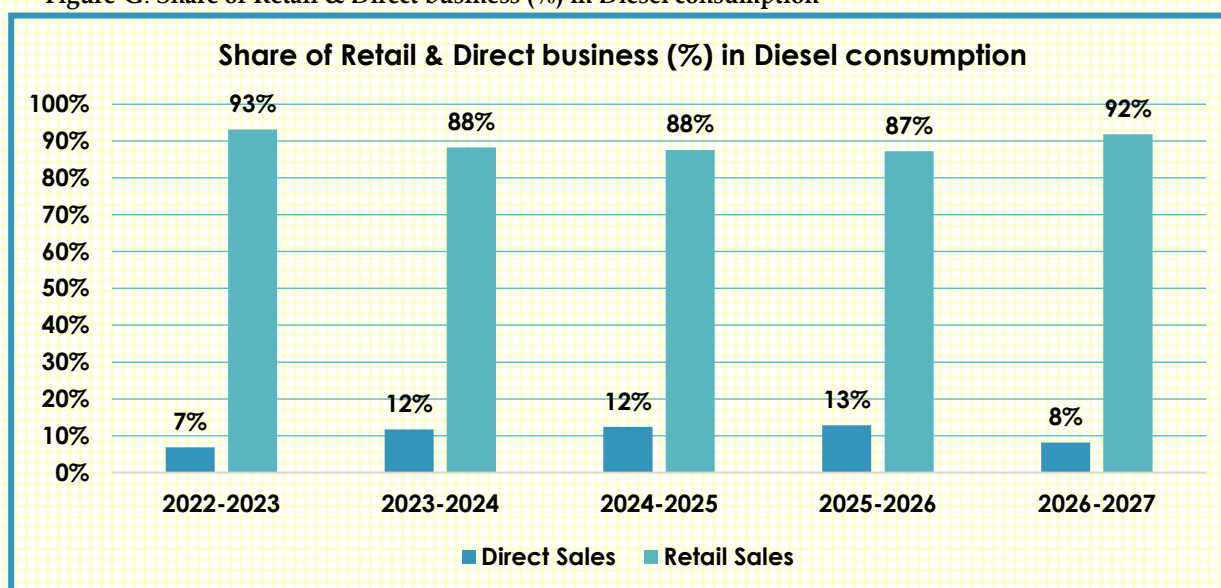
Major factors contributing to HSD consumption during the month are as follows:

- While infrastructure projects and road freight continue to support demand, The modest growth was supported primarily by demand from agricultural paddy sowing. HSD Growth was constrained by private OMCs discouraging direct sales customers from sourcing fuel through retail outlets, resulting in a significant decline in sales by private OMCs. Direct sales HSD is priced higher by more than Rs 40/- per litre compared to Retail price of HSD. Consequently, PSU oil companies recorded a 6.9% increase in sales, while private sector competitors experienced a 34.7% decline. Consequently, PSU market share gained by 4.54% to 91.8%, with Private Oil Marketing Companies (OMCs) recording a corresponding

loss. HSD remains the largest consumed petroleum product, accounting for 43.3% of the total market share in May 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.
- The intense panic-buying of HSD across Maharashtra in May created an artificial demand spike that temporarily strained rural fuel logistics. The surge was triggered by a combination of pre-monsoon agricultural preparations, geo-political tensions in middle east and domestic fuel price increases.

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



Factors impacting consumption of HSD:

Weather

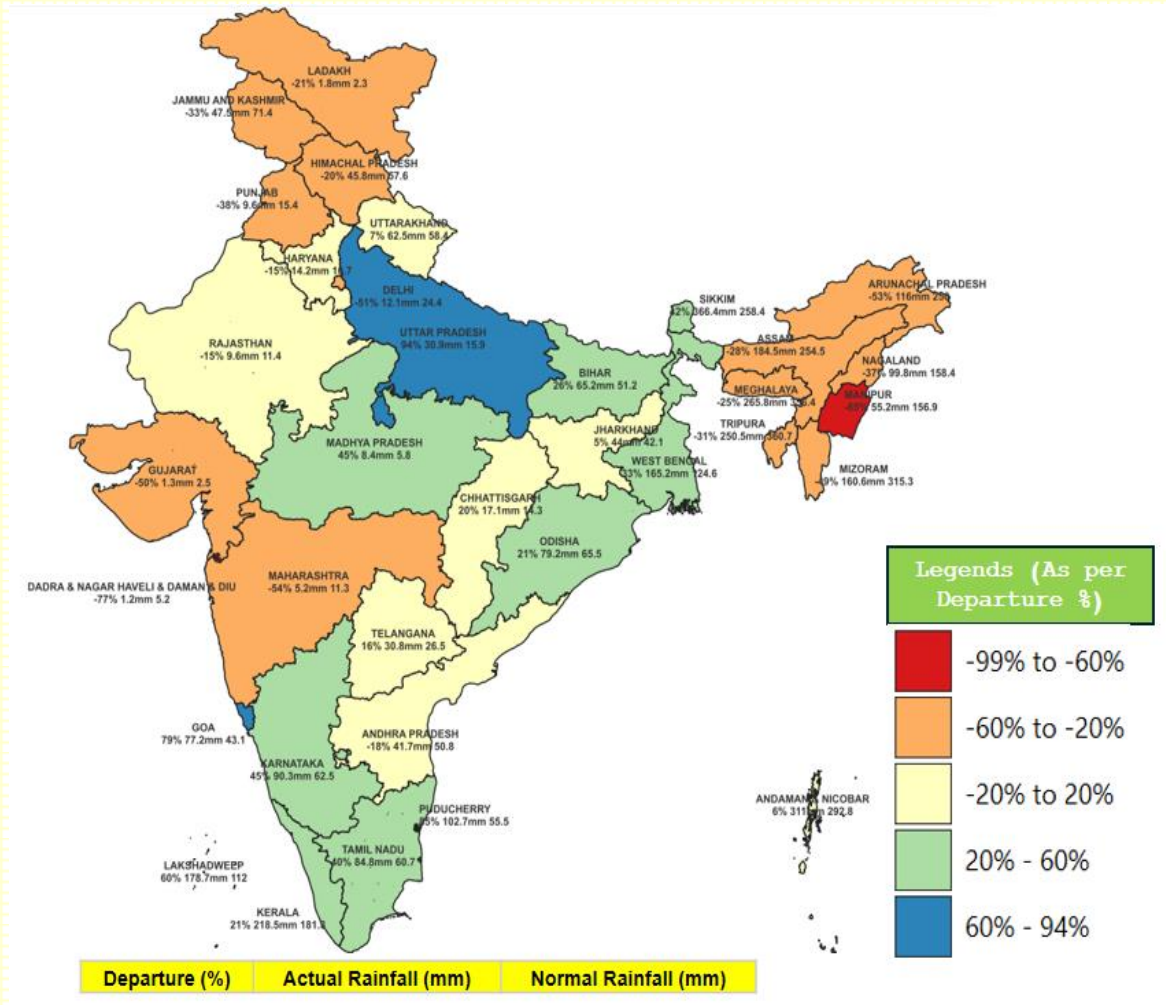
May 2026 exhibited a stark contrast between a brutal, compounding heatwave across the northern and central plains and an early surge of wet weather in the southern and northeastern regions. While the country overall recorded average temperatures slightly tempered by widespread localized precipitation, mid-to-late May brought severe, intense heatwave conditions with peak temperatures breaching 47°C in some pockets. Towards the final week of the month, the atmospheric dynamics shifted considerably as pre-monsoon convective activities intensified and the Southwest Monsoon made its formal advance into the south Arabian Sea, Andaman Sea, and parts of the Bay of Bengal, paving the way for gradual relief heading into June.

Regional Breakdown

- **Northwest India:** The region reeled under a relentless and severe heatwave during the second and third weeks of May, with temperatures soaring between 43°C and 46.5°C across Delhi, Punjab, Haryana, and Rajasthan. Relief arrived only at the very end of the month as a strong Western Disturbance triggered sharp thundersqualls, dust storms, and localized hailstorms that dropped maximum temperatures by 3°C to 5°C.
- **East and Northeast India:** Northeast India experienced frequent spells of widespread light-to-moderate rainfall alongside heavy to extremely heavy downpours, particularly in Assam and Meghalaya, driven by strong moisture inflow and cyclonic circulations. Conversely, East India (Bihar, Jharkhand, and Odisha) endured persistent, oppressive heatwaves, which were temporarily disrupted near month-end by severe thundersqualls and localized hail.
- **Central India:** Central India bore the brunt of the season's most severe weather, with regions like Vidarbha and Madhya Pradesh continuously registering departures well above normal, peaking at a sweltering 47.1°C to 47.6°C. Scattered, high-velocity thundersqualls with gusty winds finally developed in the closing days of May, instigating a gradual cooling phase.

- **South Peninsular India:** The southern peninsula remained the most stable and well-drenched region, benefiting heavily from active pre-monsoon convective systems. Kerala, Tamil Nadu, and interior Karnataka recorded heavy to very heavy rainfall accompanied by lightning and gusty winds, which successfully moderated the heat and facilitated the smooth, early advancement of the Southwest Monsoon

**Figure- H: State wise Rainfall Map for May 26. (Source: Indian Meteorological Department)
Period 01.05.2026-29.05.2026**



Commercial Vehicle
Based on data from FADA Research, Indian domestic sales of commercial vehicles in May 2026 registered a growth of 5.3% as compared to May 2025 as shown in Table-4

Tractor Sale:
Tractor domestic sales in May 2026 with a volume of 83,092 registered a growth of 11.2% over the volume of 74,744 in May 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		May'26		
		2025	2026	Growth %age
CV	LCV	46,766	50,348	7.7%
	MCV	7,287	7,630	4.7%
	HCV	25,510	25,797	1.1%
	Others	51	48	-5.9%
Total CVs		79,614	83,823	5.3%
Tractors		74,744	83,092	11.2%

Source: FADA research

Commercial vehicle sales continue to show a robust growth reflecting the continued momentum of the freight sector.

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	May-26	May-25	Variance
Intra State	907.21	770.18	18%
Inter State	453.58	422.48	7%
Total	1,360.79	1,192.66	14%

Source: GSTN Portal

Port Traffic:

The Major Ports achieved cargo throughput of 153.91 MMT during May 2026 which is 4.53% higher over same Period last year.

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

Ports	May'26	May'25	Growth (%)
Kolkata & Haldia	10953	11283	-2.92
Paradip	26714	26102	2.34
Visakhapatnam	15623	14260	9.56
Kamarajar (Ennore)	8476	7683	10.32
Chennai	9395	9980	-5.86
V.O. Chidambaranar	7558	6999	7.99
Cochin	5665	6009	-5.72
New Mangalore	8199	7441	10.19
Mormugao	3742	3176	17.82
Mumbai	12389	11785	5.13
JNPA	19174	16644	15.20
Deendayal	26025	25880	0.56
Total:	153913	147242	4.53

POWER SITUATION:

India's peak power demand surged to 270.82 GW during April-May 2026, compared

with 235.32 GW in the same period last year according to data from the Central Electricity Authority (CEA).

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

Year	Energy				Peak			
	Requirement	Availability	Surplus(+)/Deficit (-)		Peak Demand	Peak Met	Surplus (+) / Deficits (-)	
	(MU)	(MU)	(MU)	(%)	(MW)	(MW)	(MW)	(%)
2022-23	226,581	225,889	-692	-0.3%	183,037	182,379	-658	-0.4%
2023-24	270,546	267,184	-3,362	-1.2%	215,888	207,231	-8,657	-4.0%
2024-25	267,260	266,585	-675	-0.3%	221,718	221,423	-295	-0.1%
2025-26	299,749	299,437	-312	-0.1%	249,856	249,854	-2	0.0%
2026-27	296,014	295,905	-109	0.0%	235,321	235,190	-131	-0.1%
2026-27	317,521	317,180	-341	-0.1%	270,820	270,820	0	0.0%

SECTORAL CONSUMPTION OF HSD:

During 'May-26, HSD total consumption with a volume of 8.73 MMT registered 1.6% growth Year-on Year basis over the volume of 8.59 MMT in 'May-25.

92% of HSD consumption during 'May-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 'May-26'. The reduced share of direct sales is reflective of the price gap with the Retail.

High-Speed Diesel (HSD) consumption remained relatively flat in May 2026, registering a modest year-on-year growth of 1.6%. While infrastructure projects and road freight continue to support demand, The modest growth was registered primarily on account of low sales with last day of the month

being a holiday, while the growth was driven by demand from agricultural paddy sowing.

In direct sales category, the sectoral consumption break up is shown in I(II) figure. i.e., for May-26 'Road Transport' was 27%, the highest share followed by Mining 18%, Manufacturing at 7%, Shipping 10%, Agriculture 2% and Power Generation 2%. Railways share increase from 9% to 12%. 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-May'26 and its comparison with Apr-May'25

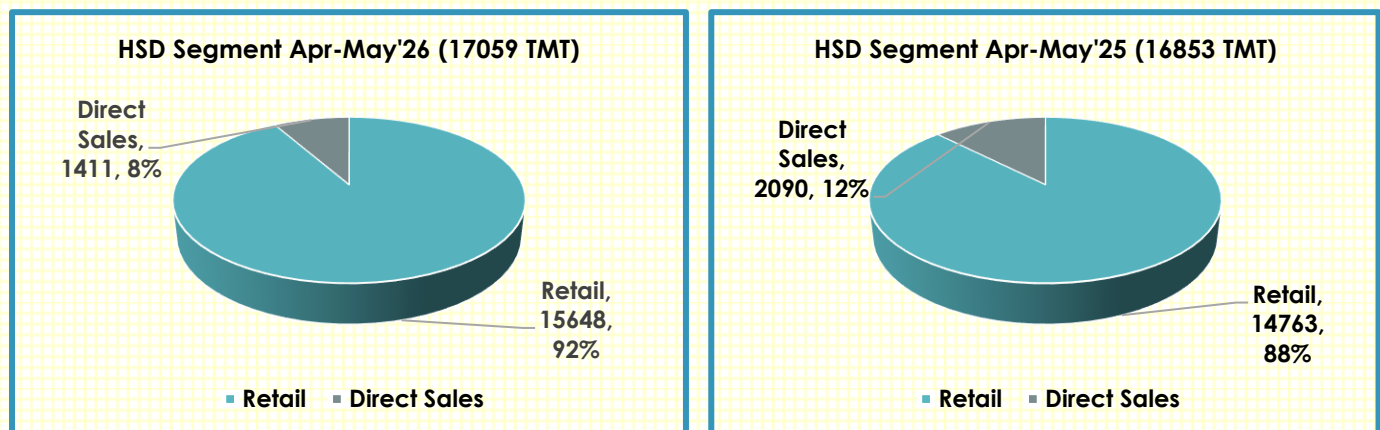
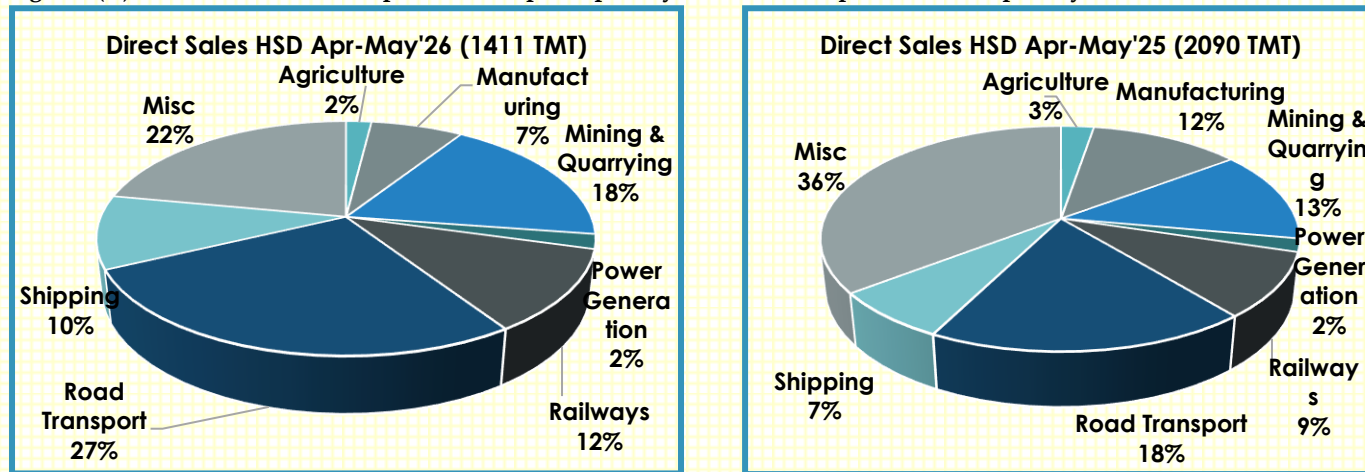


Figure-I(II): Sectoral HSD consumption Breakup in Apr-May'26 and its comparison with Apr-May'25



Share of Manufacturing has reduced from 12% to 7% owing to weaker demand from the Cement & Metal industry in the Direct Sales segment. Share of Mining sector increased from 13% to 18%. 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 32 TMT registered a de-growth of 17.8% in May 2026 as compared to May 2025 driven by PDS allocation. SKO consumption during the month is largely constituted by PDS category.

Total 17 states/UT i.e. Andaman & Nicobar Islands, Andhra Pradesh, Dadra & Nagar Haveli and Daman & Diu, Goa, Gujarat, Himachal Pradesh, Haryana, Ladakh, Lakshadweep, Madhya Pradesh, Nagaland,

Puducherry, Punjab, Rajasthan, Sikkim, Telangana, Uttar Pradesh and Uttarakhand have Adhoc allocation and 2 states -Chandigarh & Delhi have NIL allocation in the month of May 2026.

The market share of subsidized-PDS and other SKO was 73% & 27% respectively for the month May 2026 as shown in the following figure-J.

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

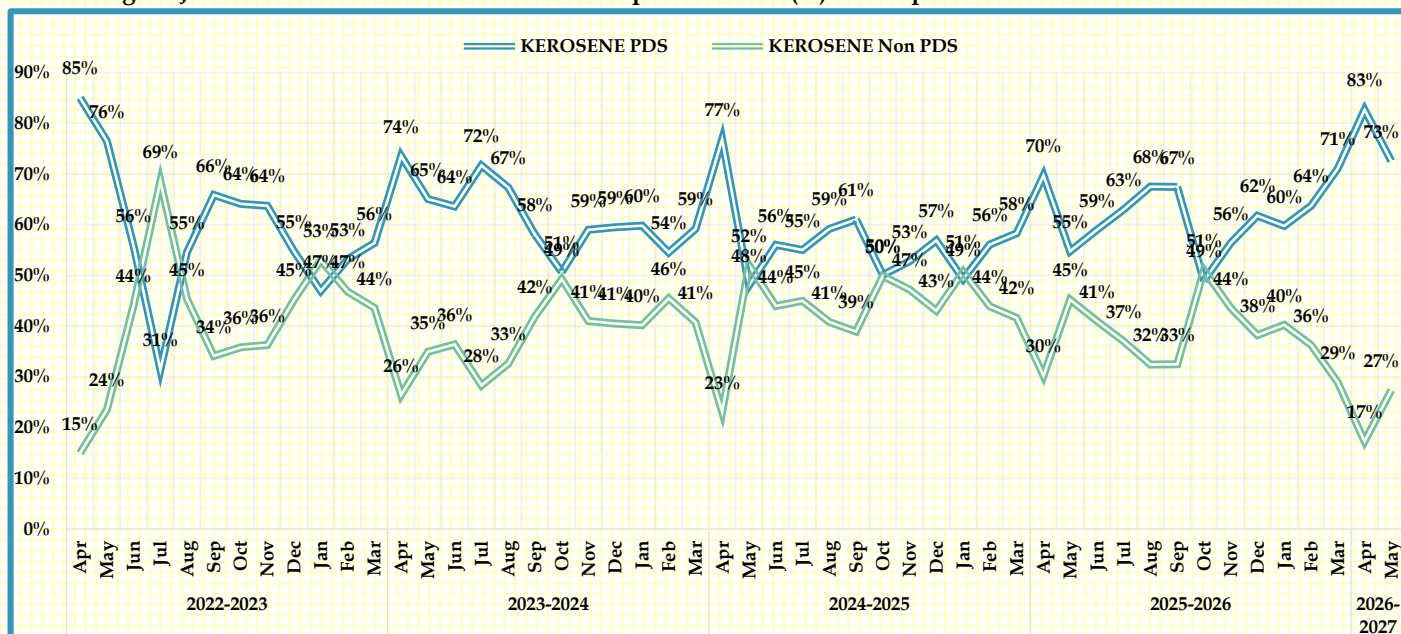
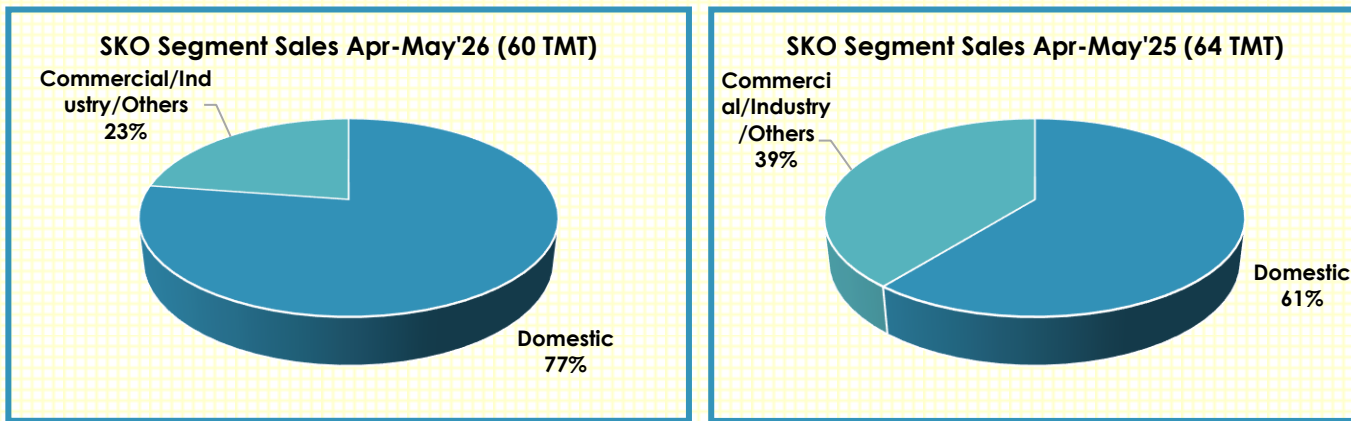


Figure-K: *Other SKO: non-subsidized PDS SKO +non-PDS kerosene

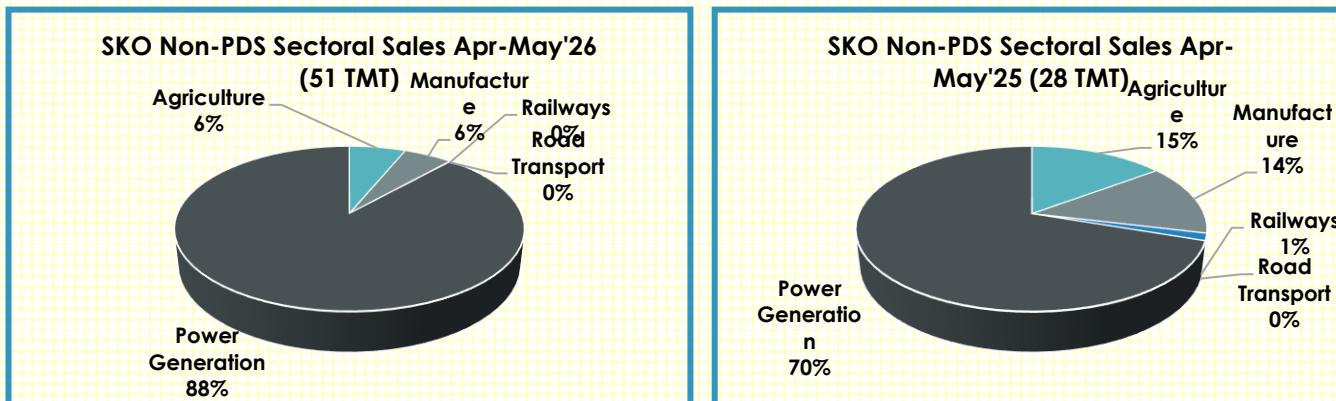


Sectoral consumption of SKO:

Out of total SKO sales during 'May'26 'PDS subsidized SKO' upliftment constituted 73%. So far as sales in 'Other SKO' is concerned, agriculture

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

Figure L: Cumulative 'Other SKO' sales breakup and Sectoral bifurcation of 'Other in Apr-May'26 and its comparison with Apr-May'25



LUBES:

Lubes consumption with a volume of 382 TMT registered a growth of 5% in May 2026 as compared to May 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 May 2026 with a volume of 519 TMT registered a de-growth of 39.4% over the volume of 857 TMT in the month of May 2025.

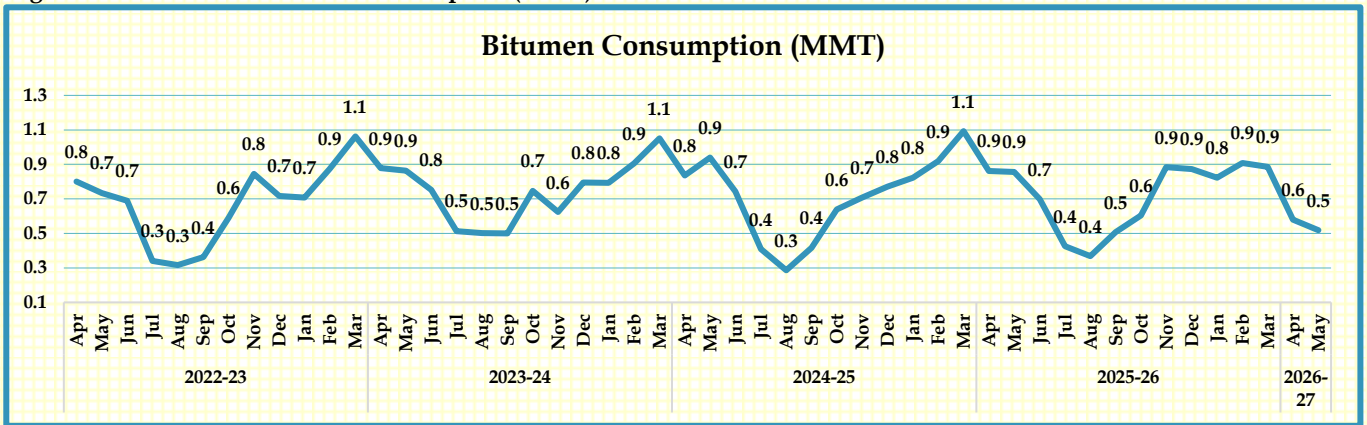
Bitumen registered a significant decline as ongoing geopolitical tension in Middle East severely disrupted the bitumen supply chain and resulted in price increase.

resulting in a critical volume contraction driven by an unprecedented **60% price hike in imported bitumen.**

Although majority of states have been unable to absorb the fiscal shock, effectively pushing the pricing risk down the infrastructure delivery chain, some regions like the **Union Territory of Ladakh** and **Punjab** have actively deployed relief frameworks to protect vital road works.

Ongoing geopolitical tensions in the Middle East have severely fractured the bitumen supply chain,

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



Sectoral consumption of Bitumen:

During 'May-26, total bitumen consumption with a volume of 519 TMT registered a de-growth of 39.4% Year-on Year basis over the volume of 857 TMT in 'May-25.

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

LPG:

LPG consumption during the month of May 2026 with a volume of 2.13 MMT registered de-growth in the month at 20.5% over the volume of 2.68 MMT in the month of May 2025. LPG consumption during the month driven by rising non-domestic sales and bulk segment.

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.

LPG de-grew by 20.5% on account of the geo-political 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 de-growth.

1. 19.3% de-growth in Packed domestic LPG consumption in May'26 as compared to May'25.

2. De-Growth of 12.6% in non-domestic packed segment.
3. Under PMUY scheme 10.57 crores beneficiaries at the end of May 2026.
4. As on 1.06.2026, total active domestic connections in India are 3331 lakhs

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

- PMUY de-growth remained at 31.8%.
 - Growth of 45.0% 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. 13.04 Crs cylinders of 14.2kg (~43.2 lacs/day) were delivered in May'26 compared to 16.6 Crs in May'25.
 6. De-Growth of 83.1% 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 May'26

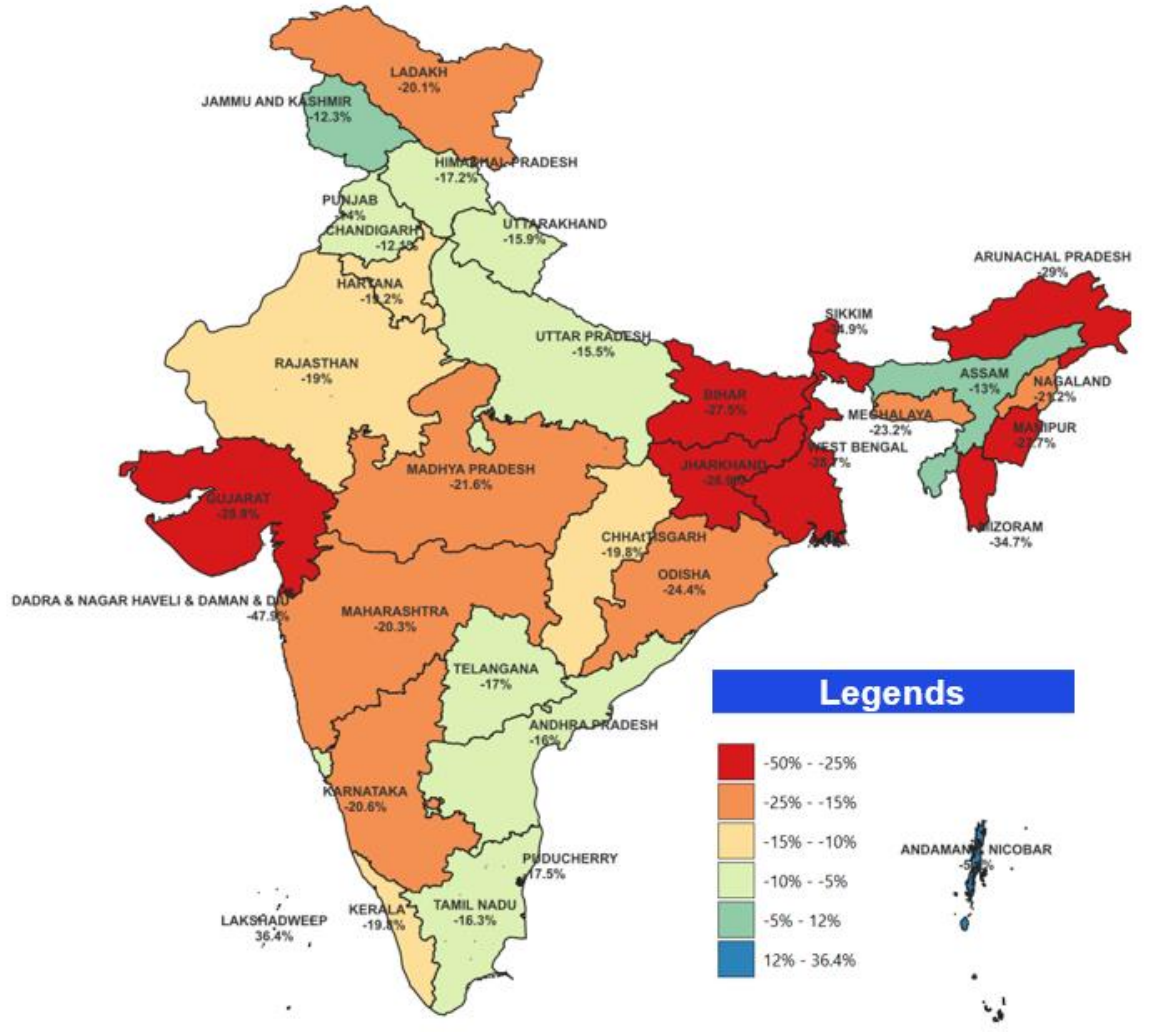
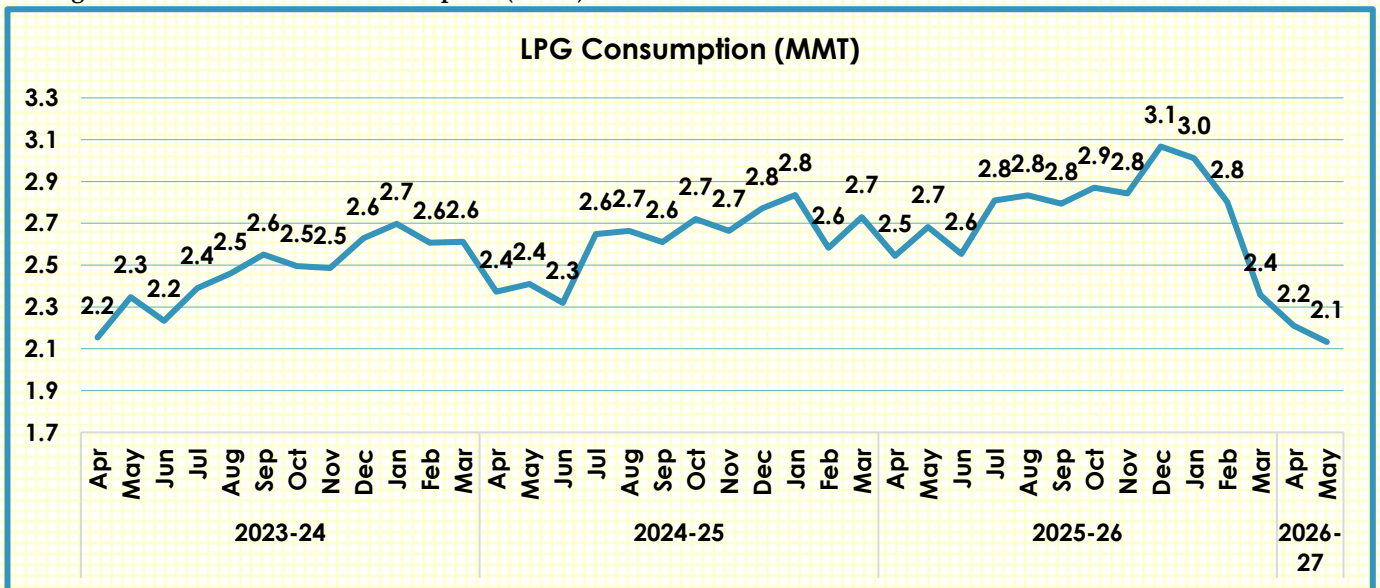


Figure-O: Month-wise LPG consumption (MMT)

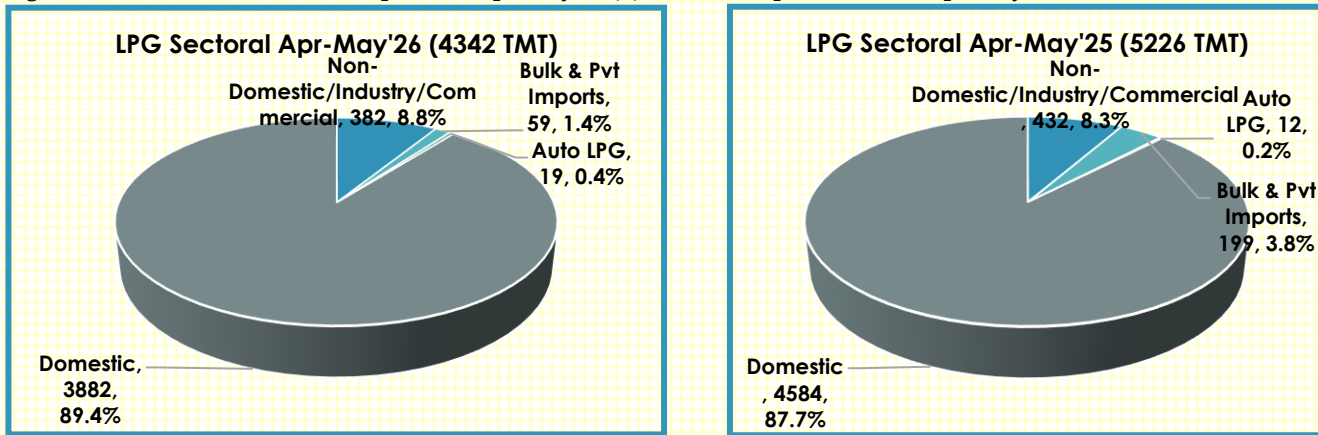


Sectoral consumption of LPG:

During 'May-26, total LPG domestic consumption with a volume of 2.13 MMT registered 20.5% de-growth Year-on Year basis over the volume of 2.68 MMT in 'May-25.

The Sectoral LPG consumption during 'Apr-May-26', was driven by Domestic packed at 89.4%, followed by LPG 'non-domestic/ industry/ commercial sector 8.5% & Bulk at 1.4%. Auto LPG at 0.4% has been on the negative trajectory getting displaced by CNG.

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



Naphtha:

Naphtha consumption during May 2026 with a volume of 667 TMT registered a de-growth of 29.4%, over a volume of 945 TMT during the month of May 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.

Major Petchem producers like HPL are operating below capacity with imported Naphtha.

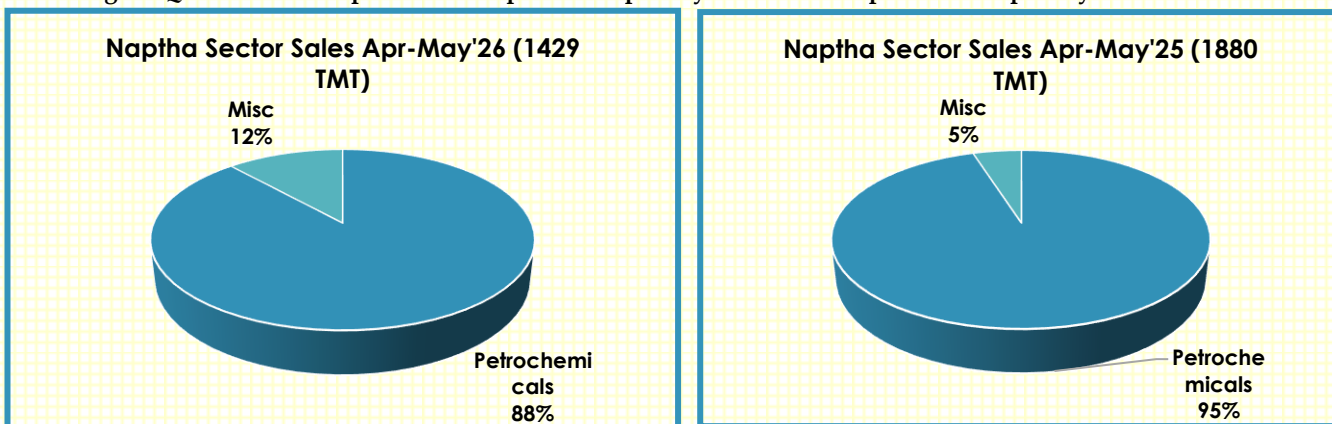
Sectoral consumption of Naphtha:

During 'May-26, total Naphtha domestic consumption with a volume of 67 TMT registered

de-growth of 29.4% Year-on Year basis over the volume of 945 TMT in 'May-25.

88% Consumption of naphtha during this period was driven by petrochemicals sector.

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



ATF:

Aviation Turbine Fuel (ATF) consumption reached 783 TMT and registered a year-on-year increase of 0.9 % in May 2026 and regained its upward momentum in May.

This suppression in demand is driven by flight disruptions on account of airspace closures by several countries affecting international flights alongwith the flight cancellations to the middle east. Suspension of multiple flights on international routes due to high fuel prices have led to notable suppression of ATF consumption.

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.

Rehabilitation work on the third runway (11R/29L) at Delhi Airport remains a critical factor impacting ATF consumption as of April 2026.

Owing to VAT change in the state of Maharashtra effective May 15, 2026 for combatting the global jet fuel price, commercial airlines shifted their critical refueling volumes from Gujarat to Maharashtra.

Southern region recorded maximum degrowth in ATF volumes in May26. International Traffic contracted by 16.4% in the month of Apr 2026 as per AAI data mentioned below in Table 8A.

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

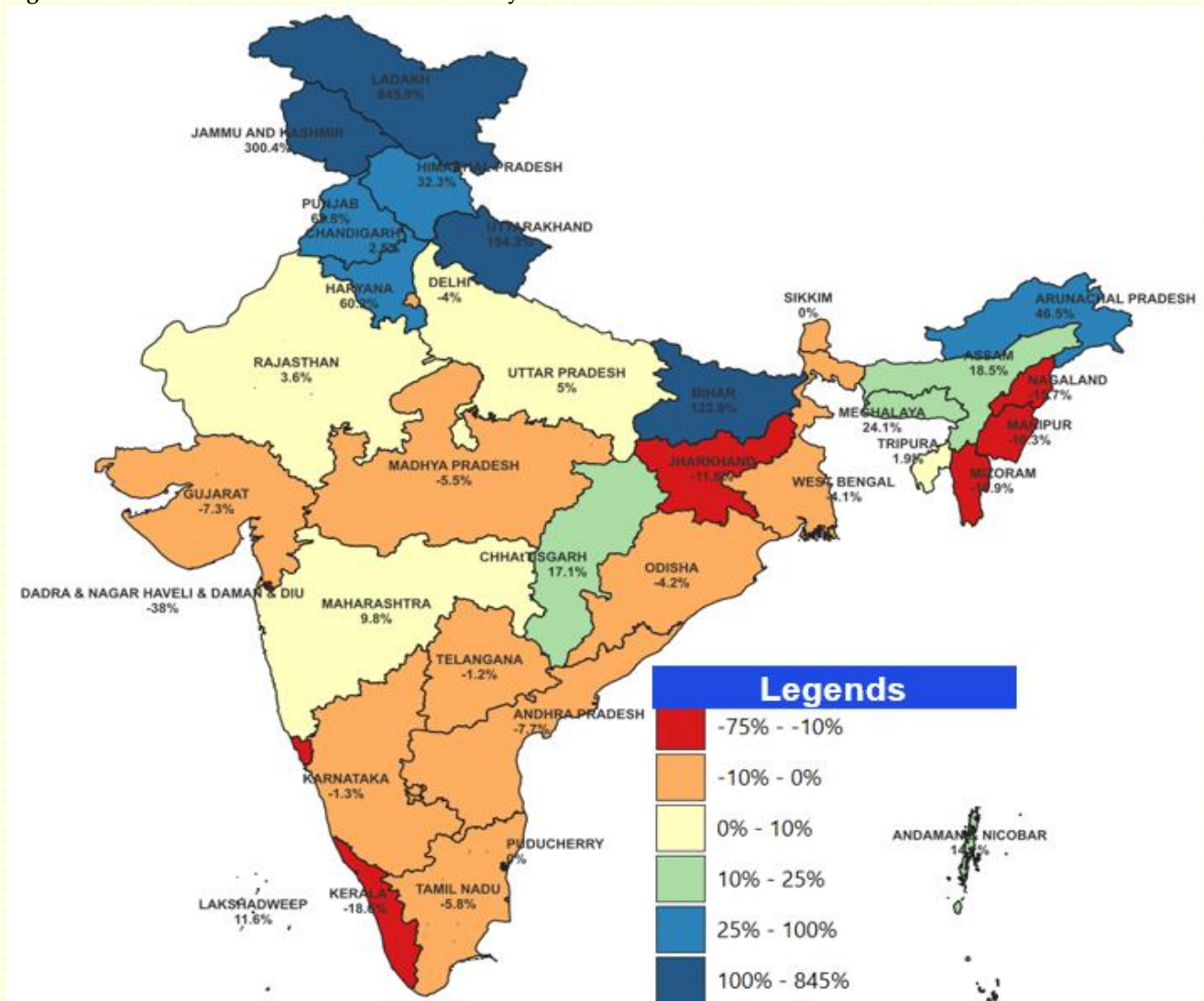
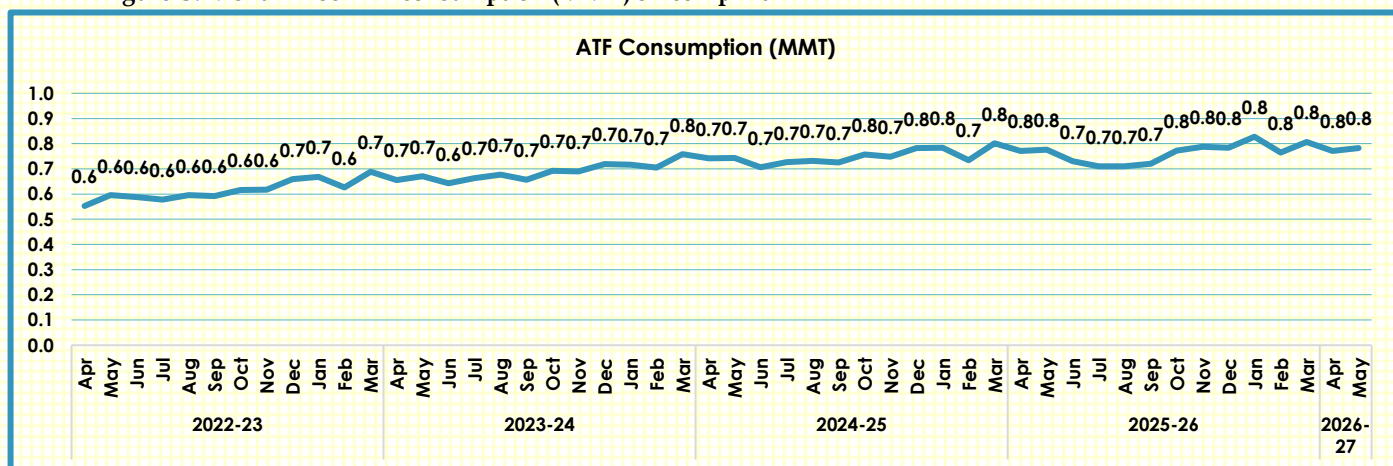


Figure-S: Month-wise ATF consumption (MMT) since Apr 2022

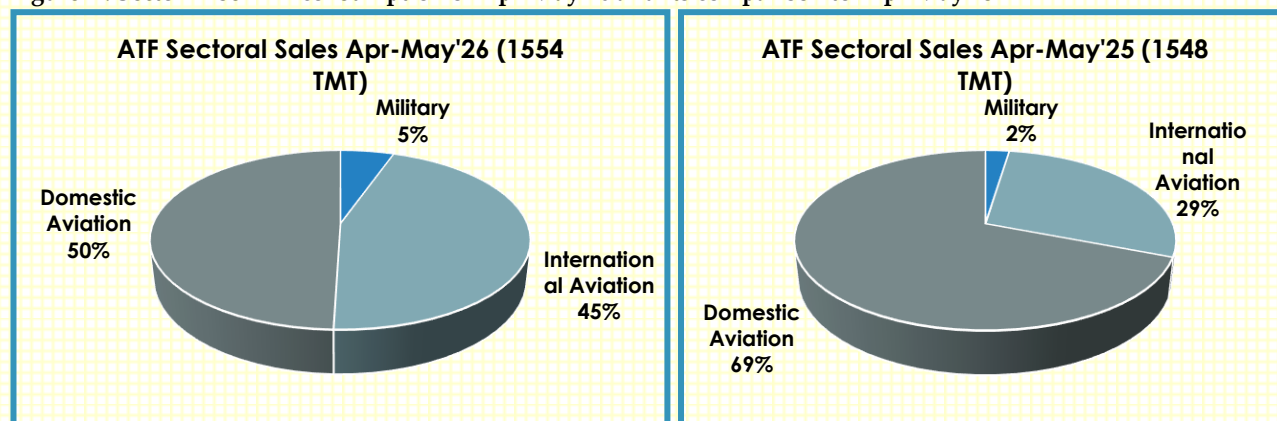


Sectoral consumption of ATF:

During 'May'26, total ATF domestic consumption with a volume of 783 TMT registered 0.9% growth Year-on Year basis over the volume of 776 TMT in 'May'-25.

Almost entire ATF consumption during 'May-26 was attributed to aviation; 50% domestic aviation, 45% 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-May'26 and its comparison to 'Apr-May'25



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

- During the month of April 2026, all operational airports (taken together) handled 241.10 thousand aircraft movements (excluding General Aviation Movements), 33.83 million passengers and 347.56 thousand tonnes of freight.
- The aircraft movements, passengers have decreased by 2.8%, 5.4% respectively and freight has increased by 9.9% at all Indian airports during April, 2026 over April, 2025.

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

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

CATEGORY	April		%
	2025-26	2024-25	CHANGE
Aircraft Movements (in '000)			
International	33.3	39.84	-16.4
Domestic	207.8	208.22	-0.2
Total	241.1	248.06	-2.8
General Aviation	31.18	28.23	10.4
Grand Total(INTL+DOM+Gen)	272.28	276.29	-1.5

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								
REGION	April			REGION	April			Difference
	Change		Change		Change		Change	
	2025-2026	2024-2025			2025-2026	2024-2025		
AIRCRAFT MOVEMENTS (IN NOS)				ATF CONSUMPTION (IN TMT)				
EASTERN	24955	25824	-3.4%	EASTERN	51	55	-7.9%	4.6%
NORTH EAST	7485	8246	-9.2%	NORTH EAST	15	15	0.8%	-10.0%
NORTHERN	54364	54425	-0.1%	NORTHERN	284	282	0.9%	-1.0%
SOUTHERN	63027	65949	-4.4%	SOUTHERN	228	217	5.1%	-9.5%
WESTERN	57965	53773	7.8%	WESTERN	192	201	-4.4%	12.2%
Total	207796	208217	-0.2%	Total	772	771	0.1%	-0.3%

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 May 2026 with a volume of 625 TMT with a growth of 24.0 % over the volume of 504 TMT in May-2025.

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

The dominant factor contributing to growth was international container ships and tankers heavily diverted their refueling stops to India's western coastline in the month of May owing to escalated geo political tensions in middle east. Ports like **Kandla, Mumbai and Kochi** experienced a significant demand surge, leading to a notable growth in the consumption.

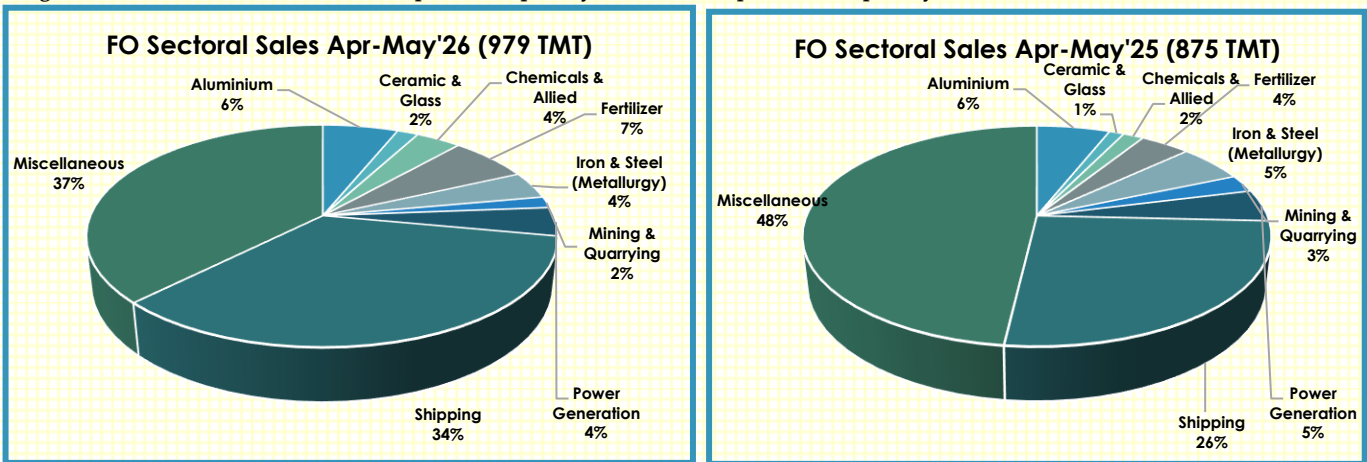
Sectoral consumption of FO/LSHS:

During 'May-26, total FO/LSHS consumption with a volume of 625 TMT with a growth of 24.0% Year-on Year basis over the volume of 504 TMT in 'May-25.

Further Product wise consumption for FO Apr-May'26 was 979 MMT vs 875 TMT in Apr-May'25 (11.9% growth). For LSHS, Apr-May'26 was 116 MMT vs 123 TMT in Apr-May'25 (7.2% De-growth).

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

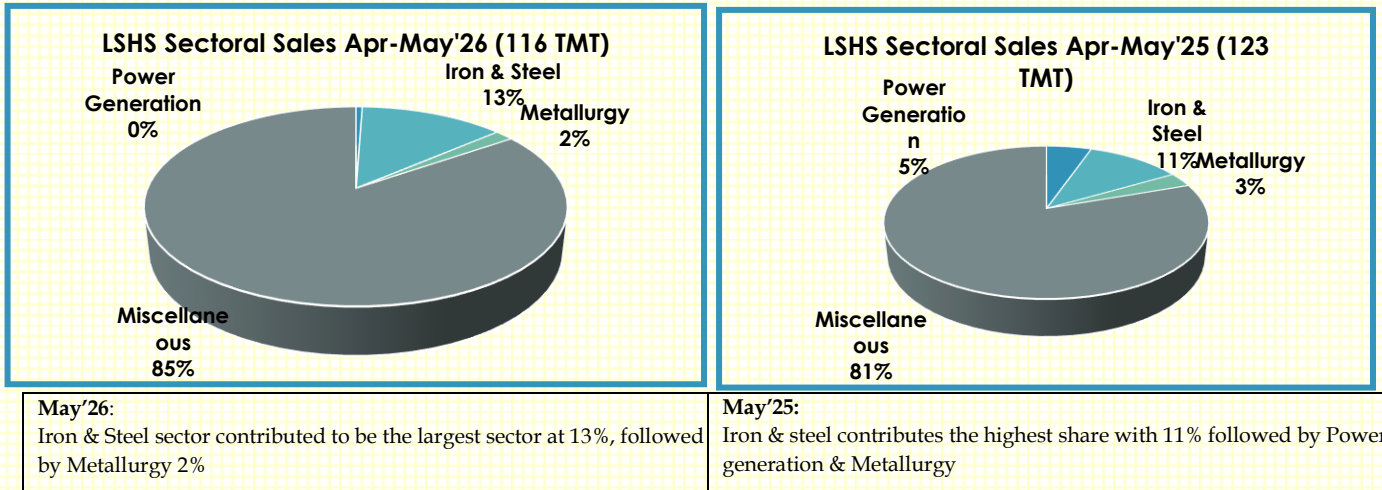
Figure-U: Sector wise FO+LSHS consumption of 'Apr-May'26 and its comparison to 'Apr-May'25



May'26:-
Shipping sector has a share of 34%, up from 26% from previous period followed by Iron & steel, fertilizer and Aluminium.

May'25:-
Shipping contributes the highest share with 26% followed by Iron & Steel Aluminium, Glass, Fertilizer & Power generation.

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



May'26: Iron & Steel sector contributed to be the largest sector at 13%, followed by Metallurgy 2%

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

Petcoke:

Petcoke consumption during the month of May 2026 with a volume of 1.60 MMT and de-growth of 11.4% over the volume of 1.81 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

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

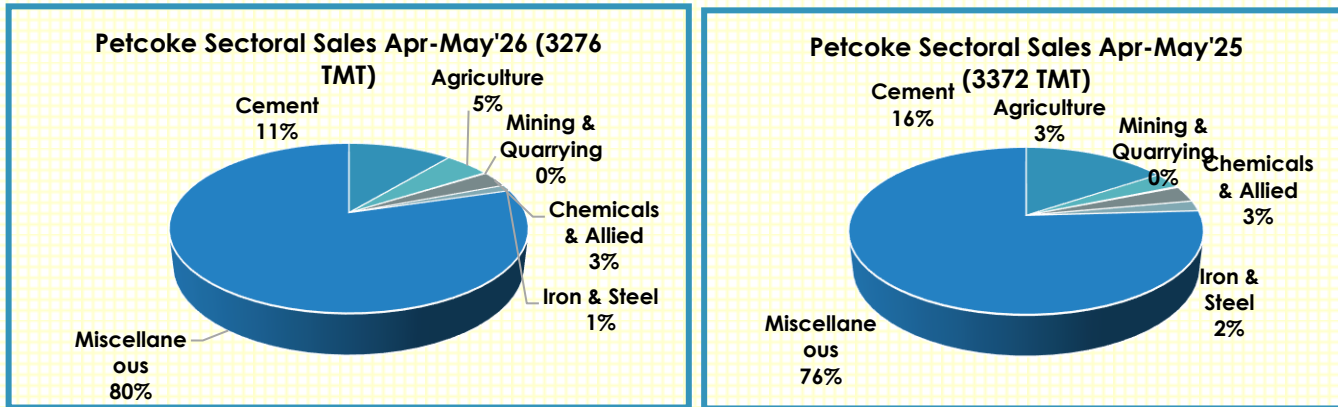
Various factors are attributed to Petcoke consumption trend: Petcoke consumption faced a significant decline by private importers as international prices remained firm. This led the cement sector to shift toward domestic thermal coal, which became more cost-effective.

Sectoral consumption of Petcoke:

During 'May-26', total Petcoke cumulative domestic consumption with a volume of 1.60 MMT registered 11.4% de-growth Year-on Year basis over the volume

of 1.81 MMT in 'May-25'. The cement sector continues to occupy the largest share in 'Apr-May'26' (P) at 11%, followed by other Industries.

Figure-W: Sector wise Petcoke consumption of 'Apr-May'26 and its comparison to 'Apr-May'25



May'26:- Cement industry occupied the highest share at 11%

May'25:- Cement industry occupied the highest share at 16%, followed by other sectors.

Light Diesel Oil

LDO consumption during the month May 2026 with a volume of 47 TMT registered a 42.7% de-growth over the volume of 81 TMT in May 2025.

May 2026 LDO consumption de-growth was attributed to following reason:

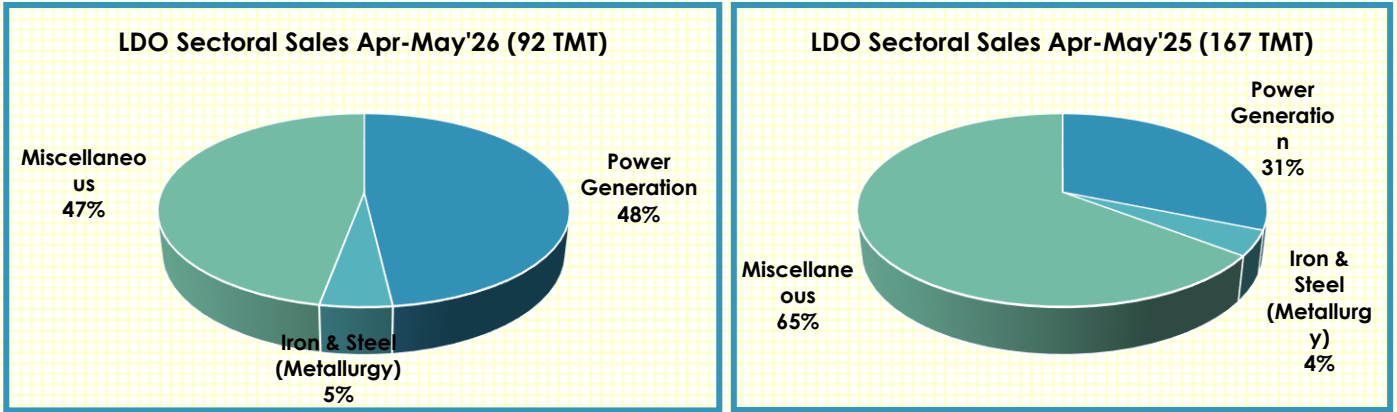
Although LDO has become the primary "cleaner" liquid fuel alternative for industrial boilers and heaters, but due to surge in prices consumers have shifted to alternate fuels including furnace oil.

Sectoral consumption of Light Diesel Oil:

During 'May-25, total LDO domestic consumption with a volume of 47 TMT registered a 42.7% de-growth Year-on Year basis over the volume of 81 TMT in 'May-25.

The cumulative consumption of Light Diesel oil (LDO) during 'Apr-May'26' was driven by 'Power Generation' 48% followed by Iron & Steel at 5%.

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



May-26:-Power Generation occupied a 48% share of the product followed by Iron & Steel & Misc industries

May-25:-Power Generation occupied a 31% 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.

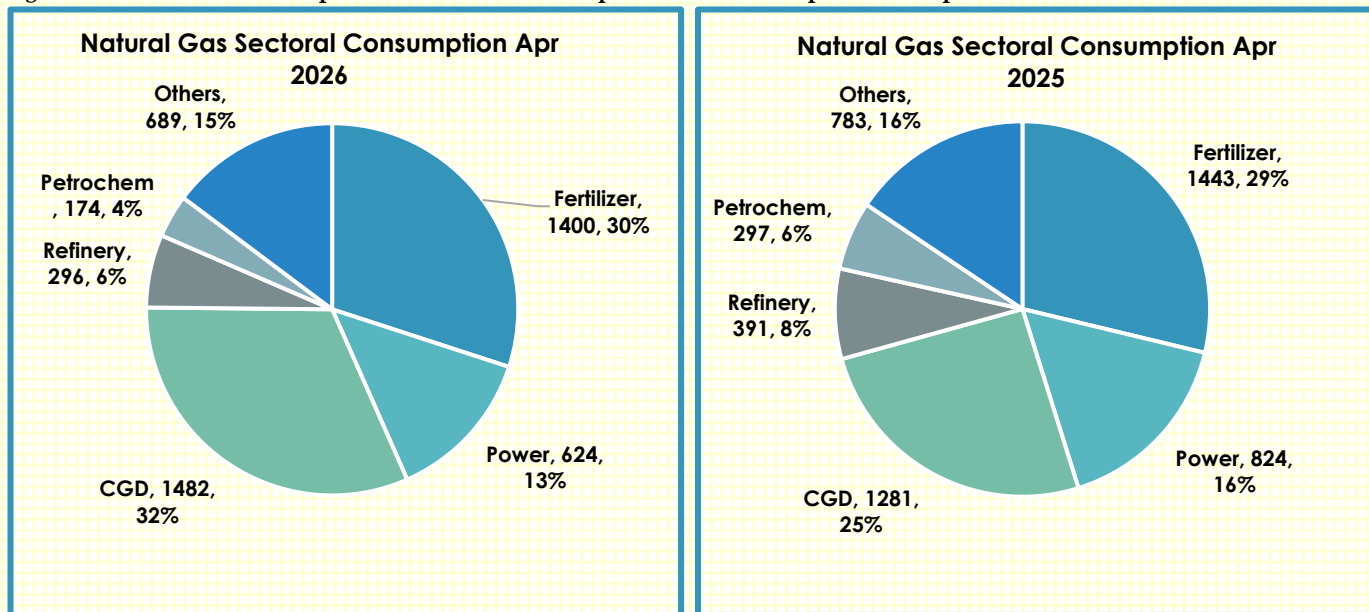
Total Natural Gas Consumption (including internal consumption) for the month of May 2026 (P) was 5061 MMSCM which was 12.87% lower

than the corresponding month of the previous year.

Sectoral consumption of Natural Gas consumption of 'Apr'26' & its comparison to 'Apr'25 (P): During Apr'26, total Natural Gas monthly domestic consumption with a volume of 5,014 MMSCM, over the volume of 5,648 MMSCM during the same period in the preceding year. During Apr'26, consumption of Natural gas (NG) was driven by fertilizer (30%) followed by CGD (32%), Power (13%) Refinery (6%), Petrochemicals (4%). Misc sectors occupied a share of 15% in Apr'2026.

As per IGX, Indian Natural Gas average spot purchase price for the month of May 2026 was 18.5 \$/MMBtu.

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



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

P: provisional

Apr'2026 Fertilizer sector occupied the highest share for the Consumption of Natural Gas at 30% with the share of CGD increasing steadily.

Apr'2025 Fertilizer sector occupied the highest share followed by CGD.



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

Product	Conversion factor (approx.)	
	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			May								
	FY2025-26	FY2026-27	Growth(%)_2026-27 over 2025-26	2022	2023	2024	2025	2026	Growth(%)_2026 over 2022	Growth(%)_2026 over 2023	Growth(%)_2026 over 2024	Growth(%)_2026 over 2025
(A) Sensitive Products												
LPG	5226	4342	-16.9	2159	2347	2410	2682	2132	-1.2	-9.1	-11.5	-20.5
SKO	64	60	-6.8	68	42	30	39	32	-53.0	-23.4	5.9	-17.8
Sub Total	5291	4402	-16.8	2226	2389	2440	2720	2164	-2.8	-9.4	-11.3	-20.4
(B) Major Decontrolled Product												
HSD	16853	17059	1.2	7287	8217	8412	8592	8728	19.8	6.2	3.8	1.6
MS	7232	7594	5.0	3017	3350	3463	3782	3910	29.6	16.7	12.9	3.4
Naphtha	1880	1429	-24.0	828	1157	1090	945	667	-19.5	-42.4	-38.8	-29.4
ATF	1548	1554	0.4	596	671	744	776	783	31.4	16.8	5.3	0.9
Bitumen	1719	1099	-36.1	734	864	940	857	519	-29.3	-39.9	-44.8	-39.4
FO & LSHS	999	1111	11.3	548	600	620	504	625	14.0	4.2	0.8	24.0
Lubricants & Greases	762	743	-2.5	300	323	471	364	382	27.1	18.2	-18.9	5.0
LDO	167	92	-44.9	55	69	62	81	47	-15.0	-32.8	-25.5	-42.7
Sub Total	31159	30682	-1.5	13366	15250	15801	15901	15659	17.2	2.7	-0.9	-1.5
Sub - Total (A) + (B)	36450	35084	-3.7	15593	17638	18241	18621	17824	14.3	1.1	-2.3	-4.3
(C) Other Minor Decontrolled Products												
Petroleum coke	3372	3276	-2.8	1472	1812	1723	1810	1604	8.9	-11.5	-6.9	-11.4
Others	1712	1037	-39.4	1305	1238	1116	874	502	-61.5	-59.4	-55.0	-42.6
Sub Total	5083	4313	-15.2	2777	3050	2840	2685	2106	-24.2	-31.0	-25.8	-21.6
Total	41533	39397	-5.1	18370	20688	21080	21306	19930	8.5	-3.7	-5.5	-6.5

*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			May								
	FY2025-26	FY2026-27	Growth(%) 2026-27 over 2025-26	2022	2023	2024	2025	2026	Growth(%)_20 26 over 2022	Growth(%)_20 26 over 2023	Growth(%)_20 26 over 2024	Growth(%)_20 26 over 2025
(A) Sensitive Products												
LPG	0.99	0.83	-16.9%	0.81	0.88	0.90	1.00	0.80	-1.2%	-9.1%	-11.5%	-20.5%
SKO	0.01	0.0080	-6.8%	0.02	0.01	0.01	0.01	0.01	-53.0%	-23.4%	5.9%	-17.8%
Sub Total	1.0	0.8	-16.8%	0.8	0.9	0.9	1.0	0.8	-2.3%	-9.3%	-11.4%	-20.5%
(B) Major Decontrolled Product												
HSD	2.10	2.13	1.2%	1.79	2.02	2.06	2.11	2.14	19.8%	6.2%	3.8%	1.6%
MS	1.05	1.11	5.0%	0.86	0.96	0.99	1.08	1.12	29.6%	16.7%	12.9%	3.4%
Naphtha	0.27	0.20	-24.0%	0.23	0.33	0.31	0.27	0.19	-19.5%	-42.4%	-38.8%	-29.4%
ATF	0.21	0.21	0.4%	0.16	0.18	0.19	0.20	0.20	31.4%	16.8%	5.3%	0.9%
Bitumen	0.17	0.11	-36.1%	0.14	0.17	0.18	0.17	0.10	-29.3%	-39.9%	-44.8%	-39.4%
FO & LSHS	0.11	0.12	11.3%	0.12	0.13	0.13	0.11	0.14	14.0%	4.2%	0.8%	24.0%
Lubricants & Greases	0.09	0.09	-2.5%	0.07	0.08	0.11	0.08	0.09	27.1%	18.2%	-18.9%	5.0%
LDO	0.02	0.01	-44.9%	0.01	0.02	0.01	0.02	0.01	-15.0%	-32.8%	-25.5%	-42.7%
Sub Total	4.0	4.0	-1.1%	3.4	3.9	4.0	4.0	4.0	17.8%	3.2%	-0.2%	-1.2%
Sub - Total (A) + (B)	5.0	4.8	-4.3%	4.2	4.8	4.9	5.1	4.8	13.9%	0.9%	-2.3%	-5.1%
(C) Other Minor Decontrolled Products												
Petroleum coke	0.31	0.30	-2.8%	0.26	0.32	0.31	0.32	0.29	8.9%	-11.5%	-6.9%	-11.4%
Others	0.23	0.14	-39.4%	0.34	0.32	0.29	0.23	0.13	-61.5%	-59.4%	-55.0%	-42.6%
Sub Total	0.5	0.4	-18.4%	0.6	0.6	0.6	0.5	0.4	-30.8%	-35.4%	-30.3%	-24.3%
Total	5.6	5.24	-5.6%	4.8	5.4	5.5	5.6	5.2	8.3%	-3.5%	-5.3%	-7.0%

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



Petroleum Planning & Analysis Cell

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