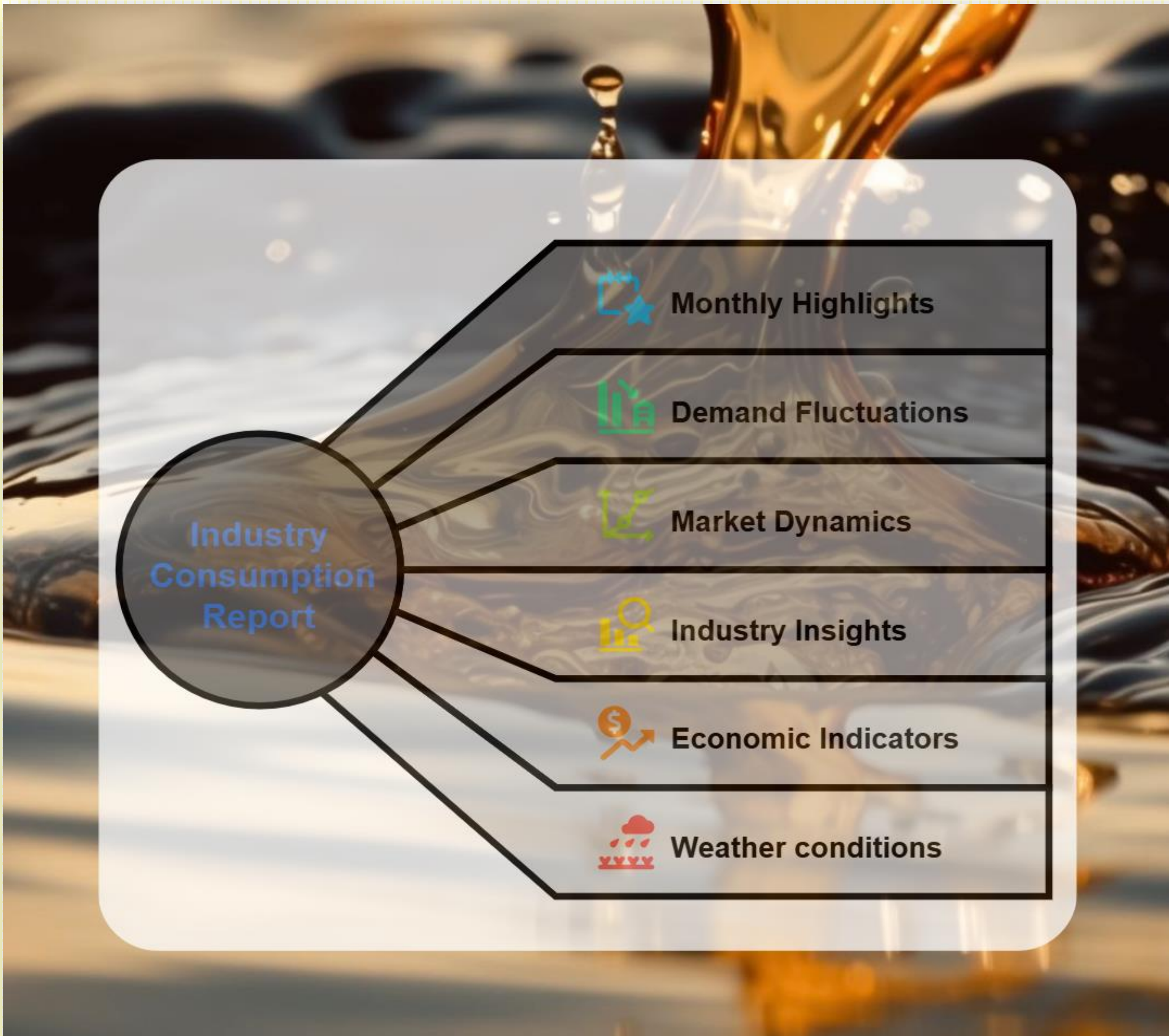


INDUSTRY CONSUMPTION REPORT POL & NG

June 2026

Contents

Highlights on Industry Consumption-POL & NG, June'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 June 2026 (Primary sales data) 11
Table-3: Two & Three Wheelers vehicle sales in the month of June & 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 Jun 2026 (Qty in TMT) Source: ipa.nic.in 16
Table-7: Power availability vs requirement for current & previous period (upto Apr-Jun 2026) 17
Table 8A: Details pertaining to aircraft movements during May'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 2023 to till date 9
Figure-B: POL consumption & Growth rate YoY basis 9
Figure-C: State Wise Growth in MS month of June-2026 10
Figure-D: Month wise MS consumption volume (MMT) since April- 2023 to till date 10
Figure-E: State Wise Growth in HSD month of June-2026 12
Figure-F: Month-wise HSD consumption (MMT) since April 2023 to till date 12
Figure-G: Share of Retail & Direct business (%) in Diesel consumption 13
Figure-H: Sub-Division Rainfall Map for June 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 June-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 June-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:
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) डी जी एच: महानिदेशक (डी जी एच) ओ आई डी बी : सचिव (ओ आई डी बी) नीति आयोग: सलाहकार (ऊर्जा), नीति आयोग 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	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 (Oil Refinery & Marketing) Jt. Secretary (Exploration) Jt. Secretary (GP) Jt. Secretary (G) Deputy Director General (D&M) Jt. Secretary (IFD) OSD (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

संख्या : डी-12013/02/2026-I
No. D-12013/02/2026-I

Subject: Industry Consumption Review Report of PPAC: June 2026

The monthly Petroleum Industry Consumption Review Report has been prepared by the Petroleum Planning and Analysis Cell (PPAC) for the month of June 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,

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

Highlights of the month: June-2026

- Manufacturing PMI Momentum: India's Manufacturing PMI remained highly resilient in June 2026, supported by strong factory orders and sustained industrial production. However, profit margins for manufacturers and Oil Marketing Companies (OMCs) continued to face pressure due to unabsorbed input costs driven by persistent West Asia geopolitical uncertainties.

- Gross GST collections for June 2026 maintained structural momentum, reflecting robust domestic transactional activity and healthy compliance, which historically correlates with steady freight movement and commercial fuel consumption.

- Following May's record peak electricity demand of 270.82 GW, intense heatwaves continued into early June. This sustained high power load directly drove higher industrial and agricultural demand, while also accelerating the adoption of alternative fuel segments like Auto LPG, which grew by 18.1%.

- Total vehicle retail sales achieved their best-ever June in history, jumping 21.83% year-on-year to 25.57 lakh units. The passenger vehicle (PV) segment expanded by 28.63% to 4.11 lakh units, driven heavily by a 35.09% surge in rural markets, signaling long-term, sustained expansion for personal mobility fuels (Motor Spirit), as per FADA.

- In early June 2026, the rollout of E85 fuel (an 85% ethanol blend) officially commenced across 48 initial Public Sector Oil Marketing Company (OMC) retail outlets.

- Alongside the fuel launch, the government officially debuted the first commercial flex-fuel passenger vehicles designed explicitly to run on these high-ethanol blends, aiming to structurally scale down crude import bills.

- On June 5, 2026, a major energy breakthrough was officially announced as Oil India Limited (OIL) successfully established a significant natural gas discovery at its exploratory well, Sri Vijayapuram-3, located 15 km off the east coast of the Andaman Islands at a water depth of 355 meters.

- Ending a 30-year geopolitical deadlock, a landmark tripartite Memorandum of Understanding (MoU) was signed on June 11, 2026, between the Central Government, the Government of Assam, and the Government of Nagaland. The agreement greenlights the immediate resumption of crude oil and mineral exploration within the long-contested Disputed Area Belt (DAB) along their state borders.

- India's retail inflation (CPI) rose to a provisional 4.38% in June 2026, up from 3.93% in May. This marked the sixth consecutive month of gradual increases and breached the Reserve Bank of India's (RBI) medium-term target of 4% for the first time in 17 months.

SUMMARY OF PRODUCT WISE POL

1. The consumption of petroleum products in June 2026 with a volume of 19.42 MMT registered a de-growth of 3.1% against the historical of 20.04 MMT in June 2025.

2. MS (Petrol) consumption during the month of June 2026 with a volume of 3.78 MMT (1.12 mbpd) recorded a growth of 7.5% on the volume of 3.52 MMT (1.05 mbpd) in June 2025.

3. Ethanol blending in Petrol was 20.0% during June'26 and cumulative ethanol blending during November 2025- June'2026 was 20.0%.

4. The Domestic Sale of Passenger Vehicles in June 2026 with a volume of 4.11 lacs registered a healthy growth of 28.6% over June 2025, as per FADA.

5. HSD (Diesel) consumption during the month of June 2026 with a volume of 8.61 MMT (2.18 mbpd) registered growth of 6.2% over the volume of 8.11 MMT (2.06 mbpd) in the month of June 2025.

6. LPG consumption during the month of June 2026 with a volume of 2.19 MMT registering a de-growth of 14.3% over the volume of 2.55 MMT in June 2025.

7. ATF consumption during June 2026 with a volume of 731 TMT retained its base. ATF recorded a volume of 730 TMT during the month of June 2025.

8. Bitumen consumption during June 2026 with a volume of 571 TMT registered a de-growth of 18.4% over the volume of 699 TMT in the month of June 2025.

9. Kerosene (SKO) consumption with a volume of 33 TMT registered a de-growth of 20.0% in June 2026 as compared to June 2025. SKO consumption during the month is largely constituted by PDS category with a 75% share.

10. 'Total Natural Gas Consumption (including internal consumption) for the month of June 2026 (P) was 5360 MMSCM which was 4.52% lower than the corresponding month of the previous year.

11. As on 30th June 2026, number of active LPG domestic connections are 33.137 cr and PMUY connections 10.57 cr.

This report analyses the trend of consumption of petroleum products in the country during the month of June 2026. Data on product-wise monthly consumption of petroleum products for June 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 June 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-Jun 2026

Product	June (TMT)				April-Jun (TMT)			
	2025	2026	% share of Jun'26	Growth (%)	2025-26	2026-27	Growth (%)	% share of Apr-Jun'26
(A) Sensitive Products								
LPG	2554	2188	11.3	-14.3	7780	6509	-16.3	11.1
SKO	41	33	0.2	-20.0	105	93	-11.9	0.2
Sub Total	**2595**	**2221**	**11.4**	**-14.4**	**7886**	**6602**	**-16.3**	**11.3**
(B) Major Decontrolled Product								
HSD	8105	8605	44.3	6.2	24959	25663	2.8	43.9
MS*	3522	3784	19.5	7.5	10753	11378	5.8	19.4
Naphtha	984	562	2.9	-42.8	2864	2271	-20.7	3.9
ATF	730	731	3.8	0.0	2278	2285	0.3	3.9
Bitumen	699	571	2.9	-18.4	2418	1481	-38.7	2.5
FO/LSHS	498	499	2.6	0.4	1496	1603	7.1	2.7
Lubes+Greases	393	371	1.9	-5.5	1155	1111	-3.8	1.9
LDO	86	46	0.2	-47.3	253	137	-45.7	0.2
Sub Total	**15017**	**15169**	**78.1**	**1.0**	**46176**	**45929**	**-0.5**	**78.5**
(C) Other Minor Decontrolled Products								
Pet.Coke	1504	1500	7.7	-0.2	4876	4397	-9.8	7.5
Others*	926	533	2.7	-42.4	2637	1591	-39.7	2.7
Sub Total	**2430**	**2034**	**10.5**	**-16.3**	**7513**	**5988**	**-20.3**	**10.2**
Total	**20042**	**19424**	**100**	**-3.1**	**61575**	**58520**	**-5.0**	**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 May'26-Jun'26, which may undergo change on receipt of actual data), and

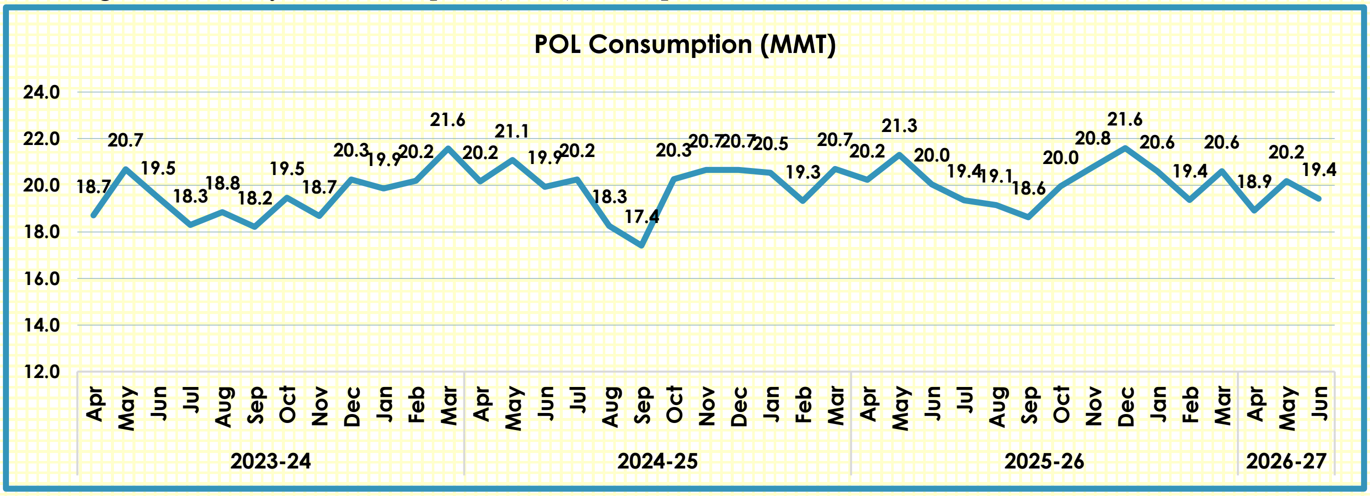
(c) MS Sales includes Ethanol Blending .

India's petroleum product consumption in June 2026 was 19.42 million metric tonnes with 3.1% de-growth over June 2025. The consumption on the growth side was primarily driven by higher demand for MS at 7.5% and HSD at 6.2%. The de-growth in POL consumption was driven by de-growth in Bitumen, Naptha & LPG owing to price volatility, supply constraints and booking interval restrictions 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 for estimation of consumption figures.

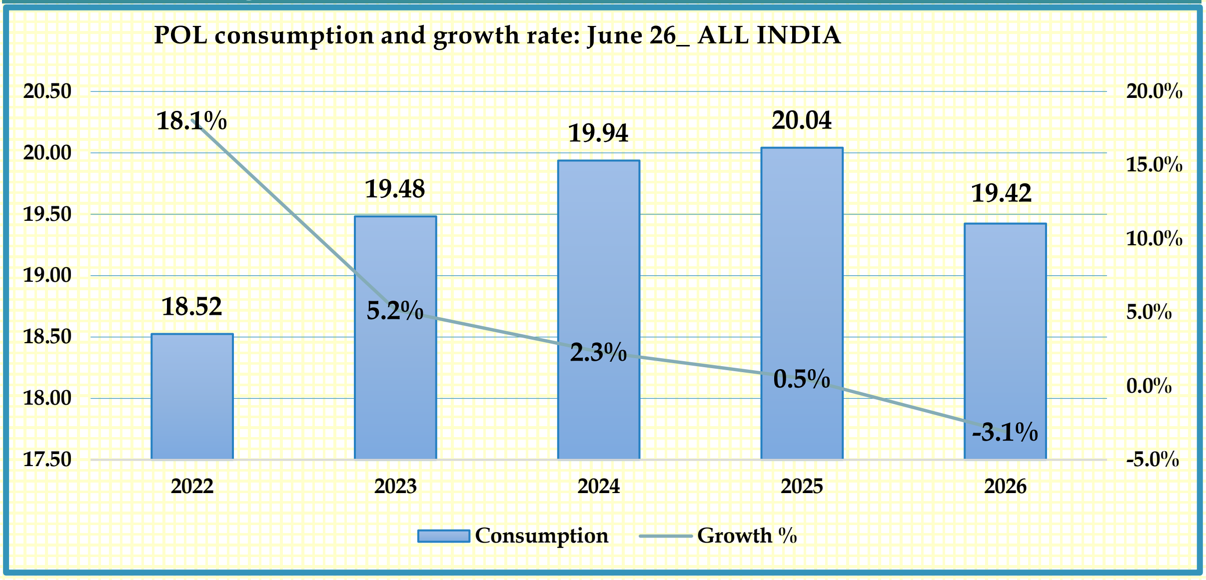
Pan India based domestic POL monthly consumption trend since April-2023 is shown in Figure-A.

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



- ✓ The overall POL domestic consumption profile of the June 2026 & its pattern since 2023 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 June 2026 with a volume of 3.78 MMT recorded a growth of 7.5% on the volume of 3.52 MMT in June 2025.

PSU's registered a growth rate of 10.02% as against 16.45% decrease by their private sector counterparts in June-26.

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

- Post GST 2.0 broad-based demand across personal mobility segments, accelerating new vehicle purchases which resulted in PV segment growing by 28.63% and 2W by 21.22% in June 26.
- The growth continues to be driven by Migrant workforce, sustained personal mobility, summer vacation travel, tourist movement, and continued economic activity across the services sector

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

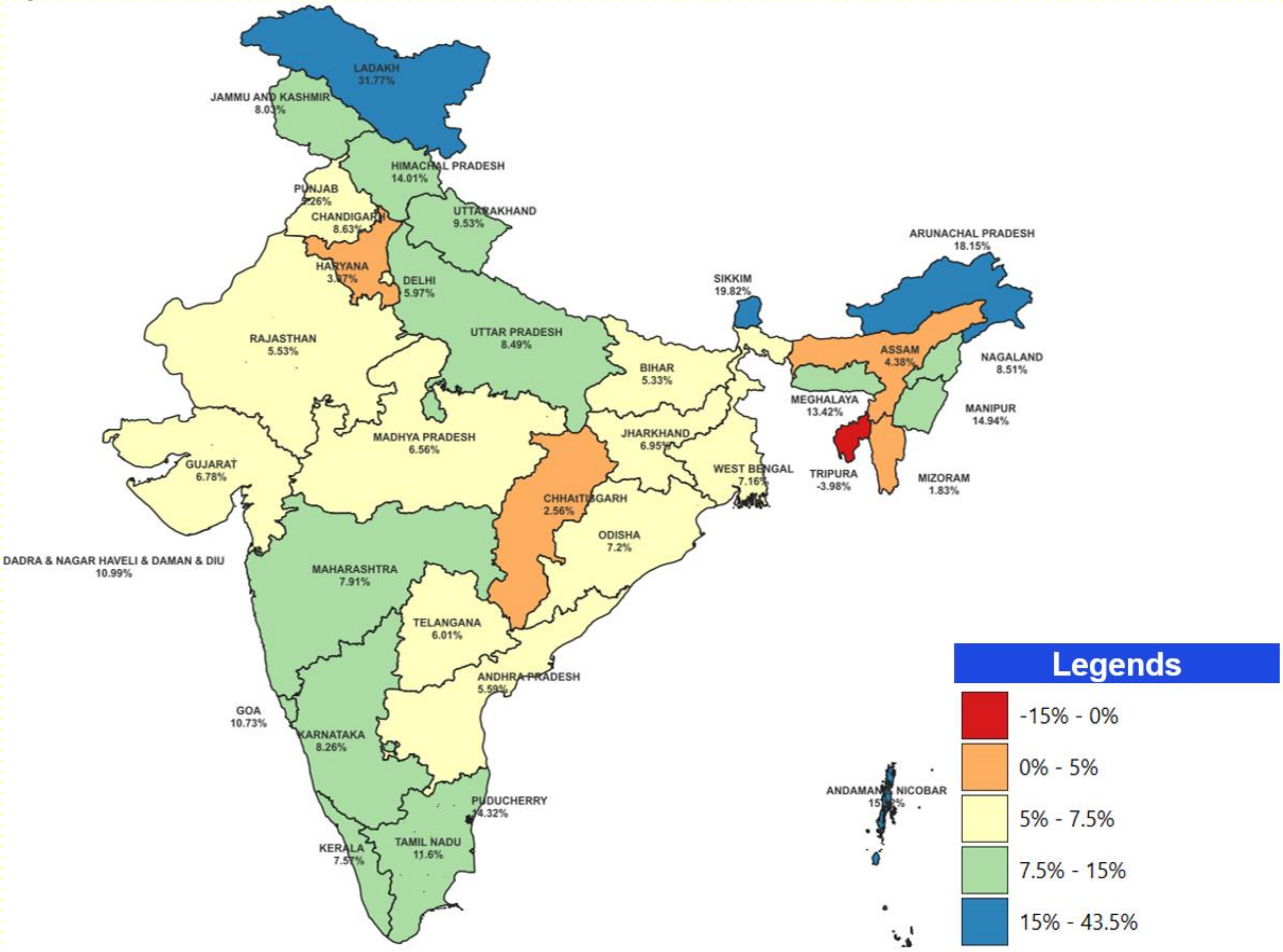
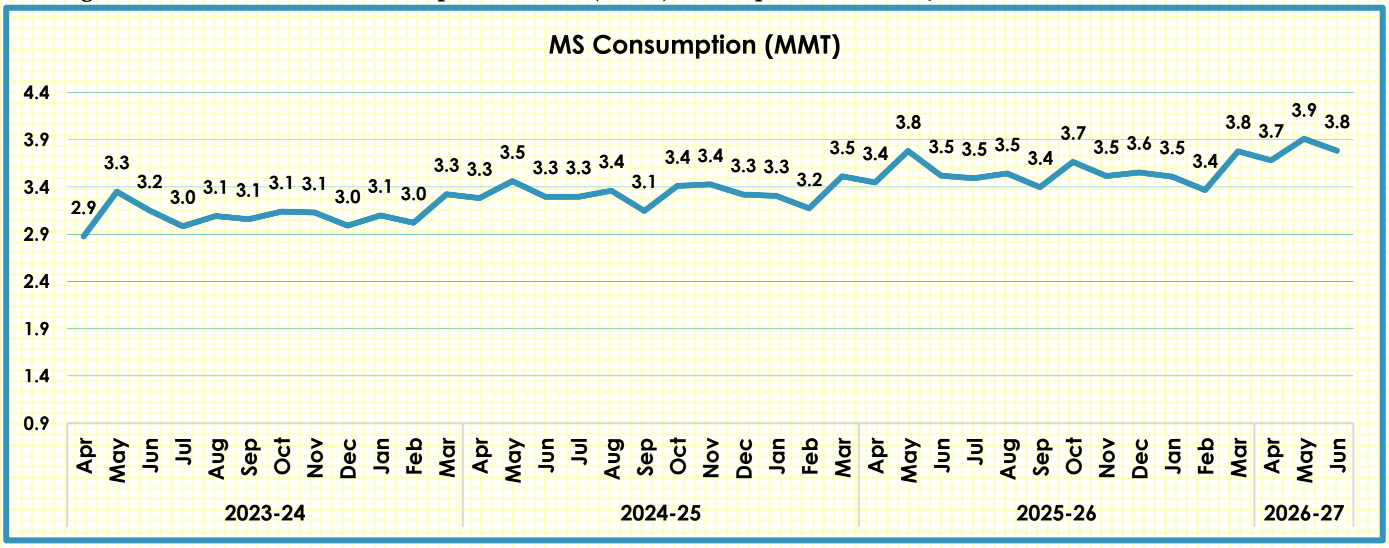


Figure-D: Month wise MS consumption volume (MMT) from April- 2023 to till June-2026



Factors impacting consumption of MS:
Passenger Vehicle Sales:

The Sale of Passenger Vehicles in June 2026 at 4.11 lacs registered 28.6% growth YoY in the month of June 25. Passenger Vehicle (PV) sales in June 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 June 2026 (Primary sales data)**

	June'26		
Vehicle Segment	**2025**	**2026**	**Growth %age**
Total PV	319,412	410,853	28.6%

Source: FADA

Two-Wheeler Sales:

Two-wheeler sales in June 2026 with a volume of 18.28 lacs registered a robust 21.2% growth, YoY basis over volume of 15.08 lacs during June 2025.

Three-Wheeler sales

Three-wheeler domestic sales in June 2026 with a volume of 1.21 lac recorded a growth of 16.2 %, YoY basis over the volume of 1.04 lacs in June 2025

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

CATEGORY	June 25	June 26	Growth %
2W	**1,508,378**	**1,828,458**	**21.2%**
Passenger Carrier-3 W	51,778	67,086	29.6%
Goods Carrier-3 W	9,998	14,247	42.5%
E-Rickshaw	35,324	32,133	-9.0%
E-cart	6,841	7,298	6.7%
Personal- 3 wheeler	94	125	33.0%
Total Three Wheelers	**1,04,035**	**1,20,889**	**16.2%**

Source: FADA

High Speed Diesel (HSD):

HSD (Diesel) consumption during the month of June 2026 with a volume of 8.61 MMT, registered a robust growth of 6.2% on the volume of 8.11 MMT in the month of June 2025.

PSUs registered a 12.0% growth and private sector witnessed 33.13% de-growth in the month of June-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 Kharif sowing activities requiring higher irrigation, compounded by high temperatures and rainfall deficit. Private OMCs experienced decline due to higher retail prices (by ₹2) and stricter compliance rules on bulk and agricultural sales. In direct sales, Private OMCs recorded degrowth highlighting a shift as bulk buyers increasingly turn to retail outlets to purchase their fuel. Consequently, PSU oil companies recorded a 12% increase in sales, while private sector competitors experienced a 33.13% decline. PSU market share gained by 4.78% to 91.9%, with Private Oil Marketing Companies (OMCs) recording a corresponding loss. HSD remains the largest consumed petroleum product, accounting for 44.3% of the total market share in June 2026.

- Growth was primarily driven by robust demand from **agriculture** alongside major infrastructure and industrial activities. This included mining, highway construction, railway projects, and urban development, all of which rely heavily on diesel-powered equipment and increased road freight movement.

- The operationalization of the Greenfield Expressways including the Delhi-Mumbai, Amritsar–Jamnagar Expressway have structurally altered long-haul freight traffic patterns, leading to shifting of HSD volumes owing to access controlled entry/exits. These dedicated economic corridors bypass the traditional state highways and national arterials.

Figure-E: State Wise Growth in HSD month of June-26

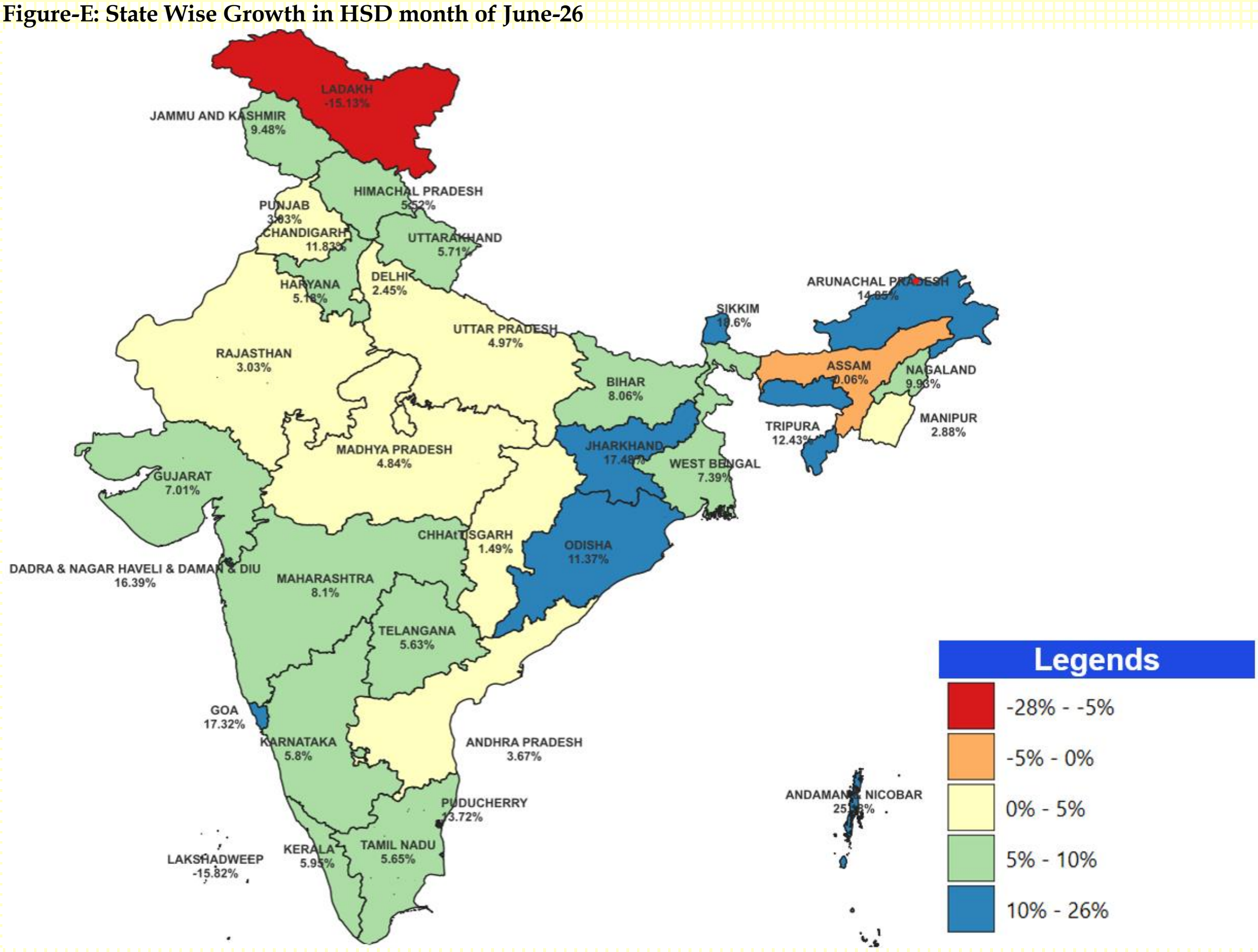


Figure-F: Month-wise HSD consumption (MMT) since April 2023

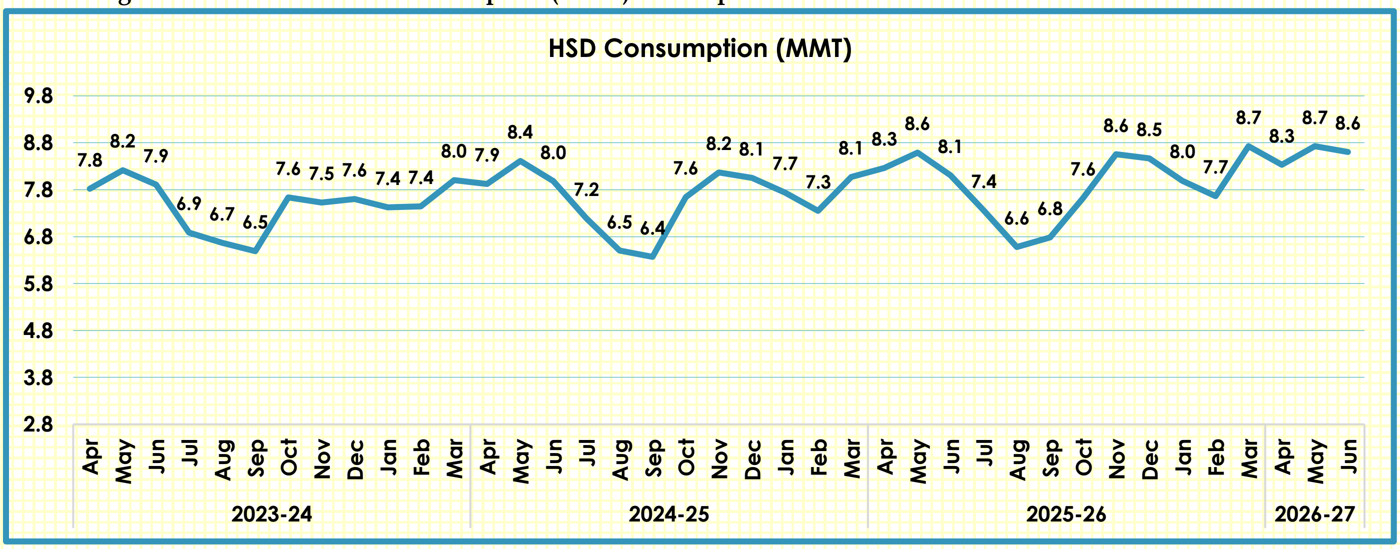
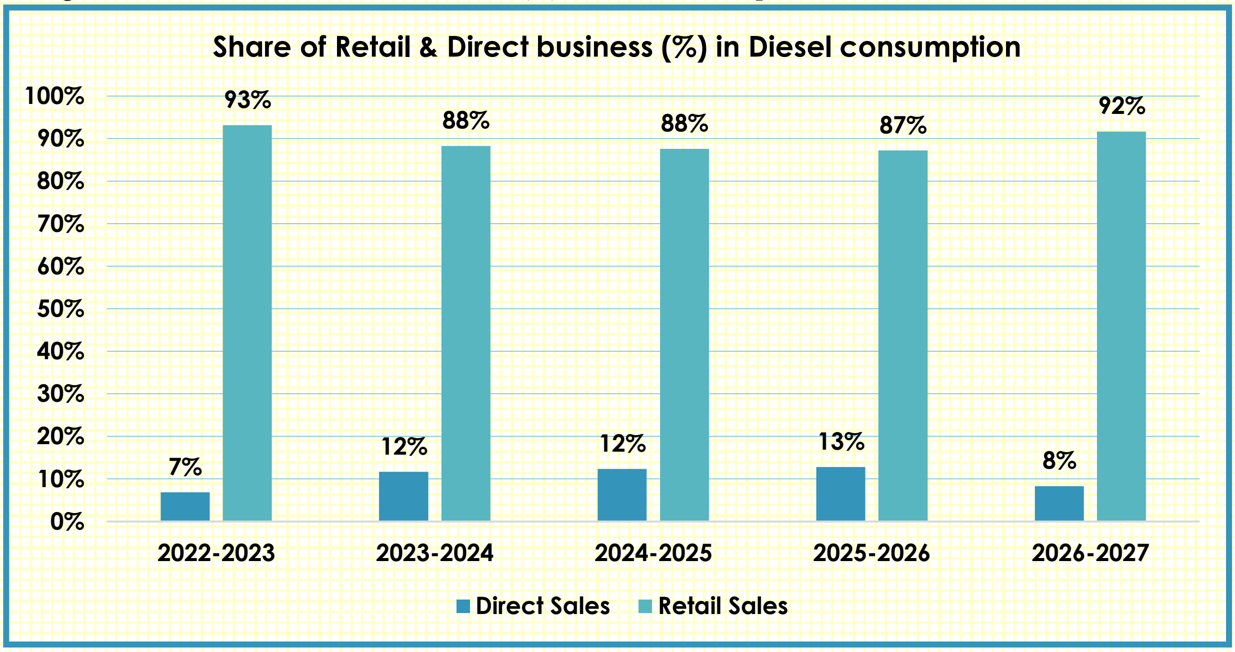


Figure-G: **Share of Retail & Direct business (%) in Diesel consumption**



Factors impacting consumption of HSD:

Weather

June 2026 exhibited a stark contrast between a delayed, sluggish progression of the Southwest Monsoon across central regions and persistent, oppressive heatwave conditions lingering over parts of north and east India. While the country overall recorded below-normal cumulative rainfall during the first half of the month due to transitioning large-scale atmospheric conditions, the Southwest Monsoon made its formal onset over Kerala on June 4th. Mid-to-late June brought severe, localized heatwave spells where peak temperatures breached 46.0°C in some northern and western pockets.

Towards the final week of the month, atmospheric dynamics shifted considerably as a series of active weather systems pushed the monsoon line deep into Central and East India, bringing widespread, intense downpours and paving the way for gradual regional relief heading into July.

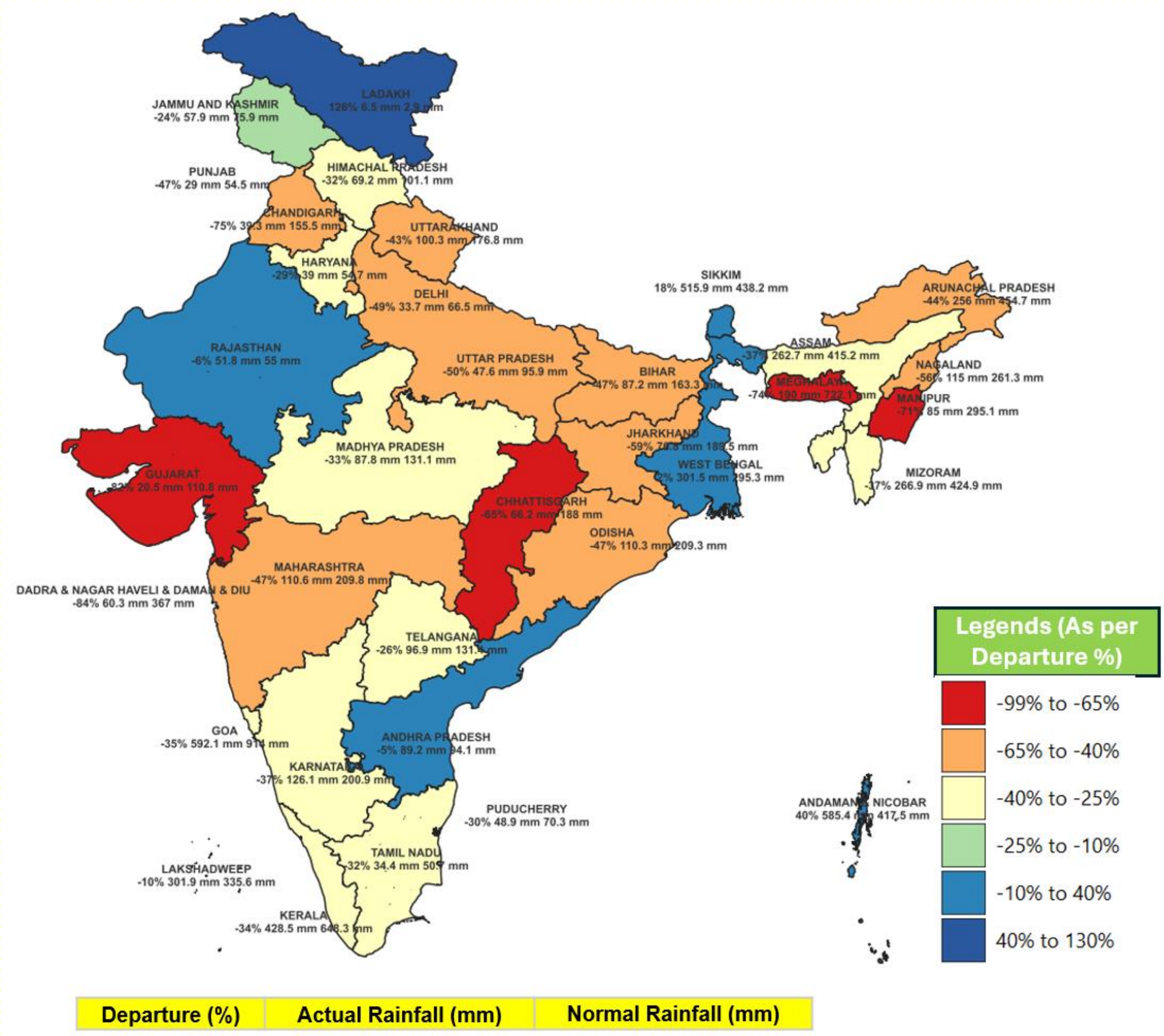
Regional Breakdown

- **Northwest India:** The region reeled under a relentless and intense heatwave during the first two weeks of June, with maximum temperatures soaring up to 46.0°C in pockets like Jaisalmer. Relief arrived intermittently throughout the month as fresh Western Disturbances triggered sharp thunderstorms, squalls, and localized wet spells that temporarily moderated the peak daytime heat.
- **East and Northeast India:** Northeast India experienced frequent spells of widespread rainfall alongside heavy to extremely heavy downpours, particularly in Assam, Meghalaya, and Sub-Himalayan West Bengal, driven by robust moisture streams and active cyclonic circulations. Conversely, parts of East India (Bihar and Jharkhand) endured persistent, oppressive heatwaves during the first half of the month before the sluggish monsoon finally advanced into the region past June 23rd.
- **Central India:** Central India bore a significant seasonal deficit early in the month as the monsoon boundary experienced a prolonged pause. Regions across Madhya Pradesh, Chhattisgarh, and Vidarbha continuously registered above-normal temperatures, but conditions shifted dynamically during the last week of June as the Southwest Monsoon advanced rapidly, instigating widespread cooling and heavy rain.
- **South Peninsular India:** The southern peninsula remained the most stable and consistently denched region, marking the formal onset of the Southwest Monsoon over Kerala on June 4th.

Steady convective systems brought heavy rainfall accompanied by lightning and gusty winds across Kerala, Karnataka, Telangana, and coastal Andhra Pradesh, which successfully moderated the seasonal heat and supported a steady early advancement inland.

Figure- H: State wise Rainfall Map for June 26. (Source: Indian Meteorological Department)

Period 01.06.2026-30.06.2026



Commercial Vehicle

Based on data from FADA Research, Indian domestic sales of commercial vehicles in June 2026 registered a growth of 16.9% as compared to June 2025 as shown in Table-4

Tractor Sale:

Tractor domestic sales in June 2026 with a volume of 100,818 registered a robust growth of 25.3% showing continued momentum since the roll out of GST 2.0.

Tractor sales was driven by continued strong rural demand, increased mechanization, and positive farmer sentiment. Tractor sales recorded volume of 80,456 in June 2025,

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

Commercial vehicles & tractors		June'26		
		2025	2026	Growth %age
CV	LCV	47,096	57,031	21.1%
	MCV	8,316	9,714	16.8%
	HCV	22,336	24,181	8.3%
	Others	88	46	-47.7%
Total CVs		**77,836**	**90,972**	**16.9%**
Tractors		**80,456**	**100,818**	**25.3%**

Source: FADA research

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

E-Way Bill

Effective August 1, 2026, the Government of India mandates the compulsory reporting of the "Ship-To" GSTIN in all Bill-To/Ship-To transactions to ensure flawless consignment traceability. This compliance architecture applies directly to all commercial cargo movements passing statutory transaction value thresholds: a uniform **₹50,000 limit for Inter-State transactions**, and a **State-specific variable limit for Intra-State transactions** (which ranges from ₹50,000 to ₹1,00,000 or ₹2,00,000 depending on the local state jurisdiction

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

Month	Jun-26	Jun-25	Variance	Apr-Jun 26	Apr-Jun 25	Growth
Intra State	910.24	788.57	15%	2,697.52	2,360.46	14.3%
Inter State	457.43	406.02	13%	1,364.67	1,253.31	8.9%
Total	**1,367.67**	**1,194.59**	**14%**	**4,062.19**	**3,613.77**	**12.4%**

Source: GSTN Portal

Port Traffic:

The Major Ports achieved cargo throughput of 233.64 MMT during June 2026 which is 6.09% higher over same Period last year.

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

Ports	Jun'26	Jun'25	Growth (%)
Kolkata & Haldia	17243	17235	0.05%
Paradip	39666	39245	1.07%
Visakhapatnam	24389	21587	12.98%
Kamarajar (Ennore)	12776	11788	8.38%
Chennai	14225	15060	-5.54%
V.O. Chidambaranar	10861	10729	1.23%
Cochin	8691	9408	-7.62%
New Mangalore	11773	10744	9.58%
Mormugao	5225	4856	7.60%
Mumbai	18192	17466	4.16%
JNPA	27840	24200	15.04%
Deendayal	42756	37913	12.77%
Total:	**233637**	**220231**	**6.09%**

POWER SITUATION:

India's peak power demand surged to 270.83 GW during April–June 2026, compared with 243.12 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 Apr-Jun 2026)

Year	Energy				Peak			
	Requirement	Availability	Surplus(+)/Deficit (-)		Peak Demand	Peak Met	Surplus (+) / Deficits (-)	
	(MU)	(MU)	(MU)	(%)	(MW)	(MW)	(MW)	(%)
2021-22	341,418	340,372	-1,046	-0.3%	193,996	191,243	-2,753	-1.4%
2022-23	404,605	400,448	-4,157	-1.0%	215,888	207,231	-8,657	-4.0%
2023-24	407,780	406,862	-918	-0.2%	224,106	223,292	-814	-0.4%
2024-25	452,399	451,811	-588	-0.1%	249,856	249,854	-2	0.0%
2025-26	445,800	445,636	-164	0.0%	243,118	242,493	-625	-0.3%
2026-27	483,117	482,435	-682	-0.1%	270,832	270,820	-12	0.0%

SECTORAL CONSUMPTION OF HSD:

During 'Apr-Jun'26, HSD total consumption with a volume of 25.66 MMT registered 2.8%growth Year-on Year basis over the volume of 24.96 MMT in 'Apr-Jun'25.

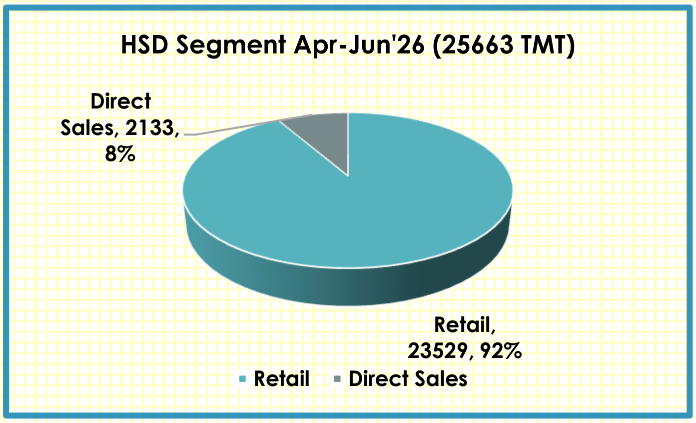
92% of HSD consumption during 'Apri-Jun-26', was constituted by retail sales. Balance 8% falls under direct sales category as shown in I(I/II) figure. The bifurcation was 88:12 in 'Apr-Jun-25'. The reduced share of direct sales is reflective of the price gap with the Retail.

High-Speed Diesel (HSD) consumption regained its momentum in 'Apr-Jun'26, registering a robust year-on-year growth of 2.8%. While infrastructure projects and road freight continue to support demand, The robust growth was registered primarily on account of demand from Kharif sowing activities requiring higher irrigation, compounded by high temperatures and rainfall deficit.

In direct sales category, the sectoral consumption break up is shown in I(II) figure. i.e., for Apr-Jun-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 11% in view of reducing total direct sales although absolute volumes were lower. Retail sales continue to cater to mostly the road transport.

Also share of Road transport & shipping increased by 8% & 3% respectively.

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



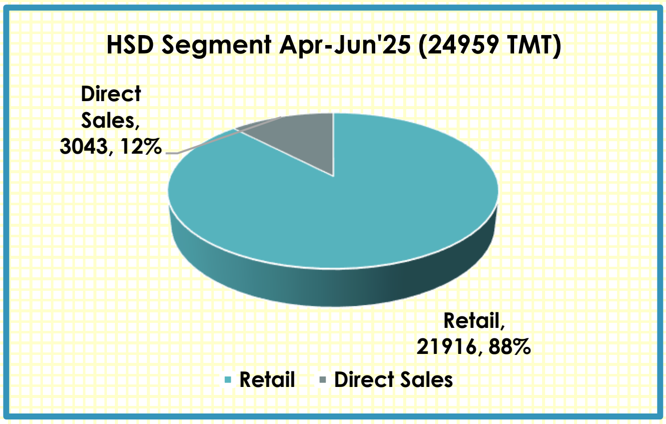
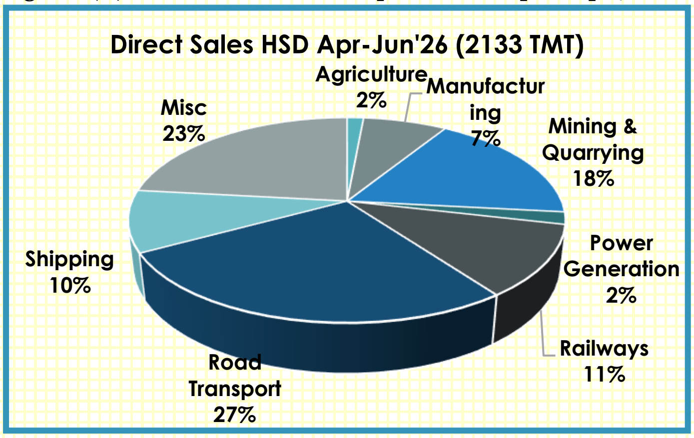
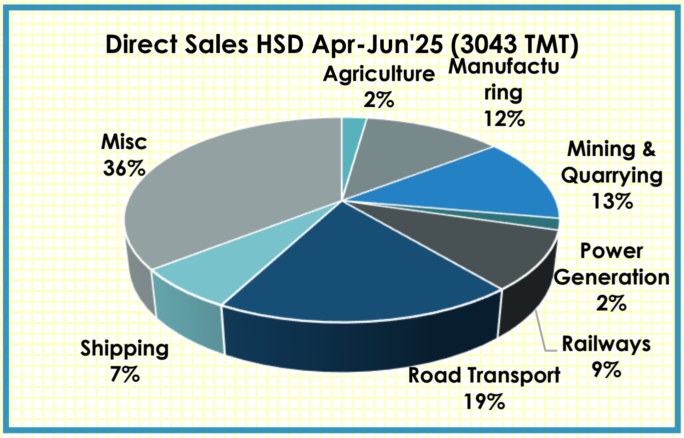


Figure-I(II): Sectoral HSD consumption Breakup in Apr-Jun'26 and its comparison with Apr-Jun'25





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, Fertlizers, Textiles, Ceremic & glass & other Misc Consumer/Industrials goods.

Kerosene:

Kerosene (SKO) consumption with a volume of 33 TMT registered a de-growth of 20.0% in Jun 2026 as compared to Jun 2025 driven by PDS allocation. SKO consumption during the month is largely constituted by PDS category.

Total 18 states/UT i.e. Andaman & Nicobar Islands, Andhra Pradesh, Dadra & Nagar Haveli and Daman & Diu, Goa, Gujarat, Himachal Pradesh, Haryana, Jammu & Kashmir, Ladakh, Lakshadweep, Madhya Pradesh, Nagaland, Puducherry, Punjab, Rajasthan, Sikkim, Uttar Pradesh and Uttarakhand have Adhoc allocation and 3 states -Chandigarh, Delhi & Telangana have NIL allocation in the month of Jun 2026.

The market share of subsidized-PDS and other SKO was 75% & 25% respectively for the month Jun 2026 as shown in the following figure-J.

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

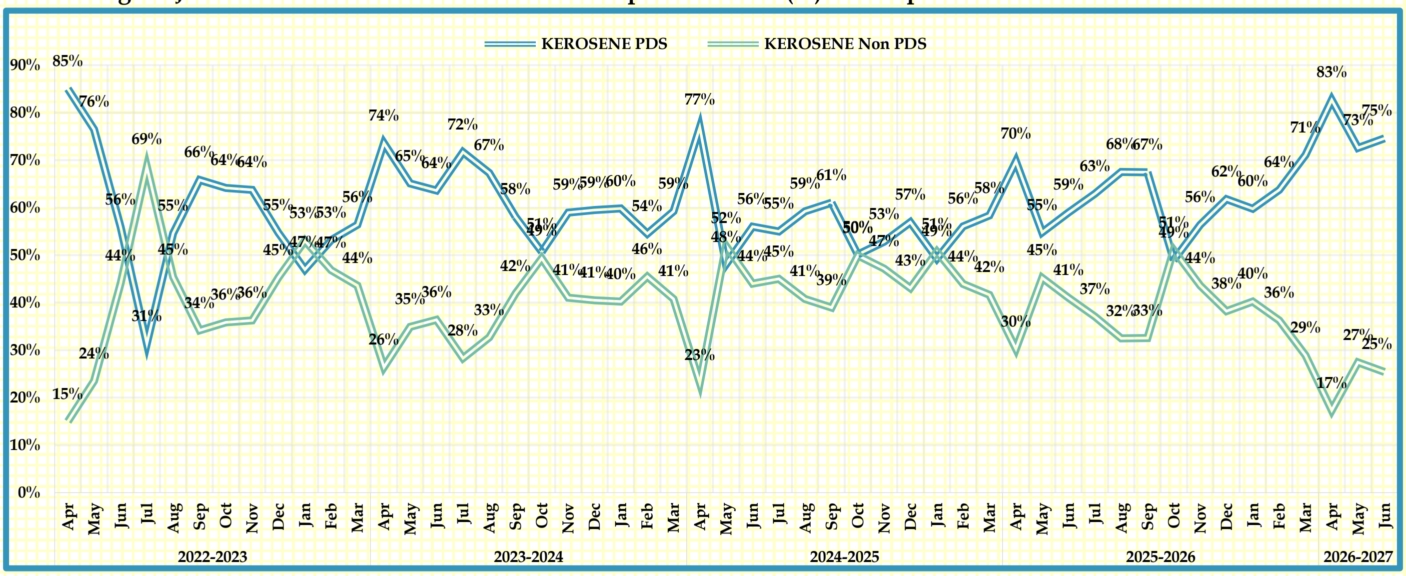
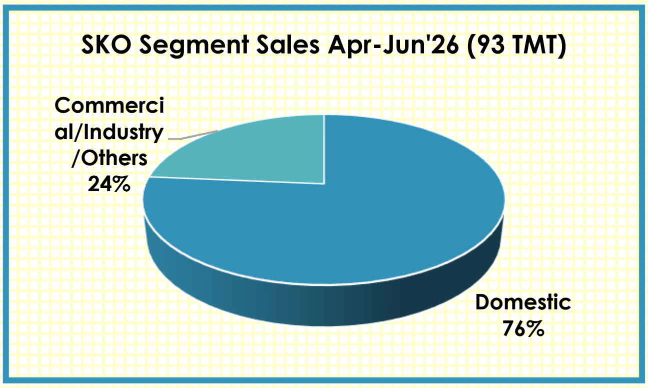
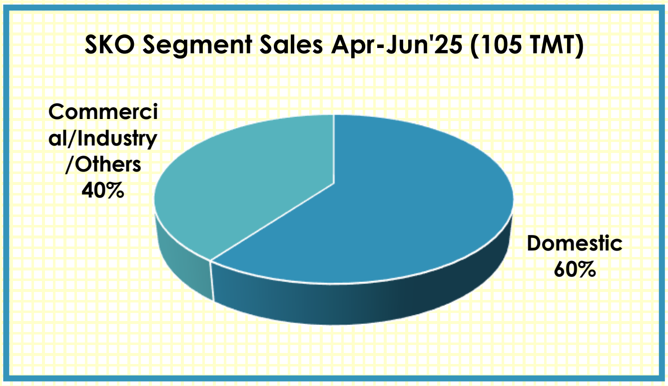


Figure-K: *Other SKO: non-subsidized PDS SKO +non-PDS kerosene

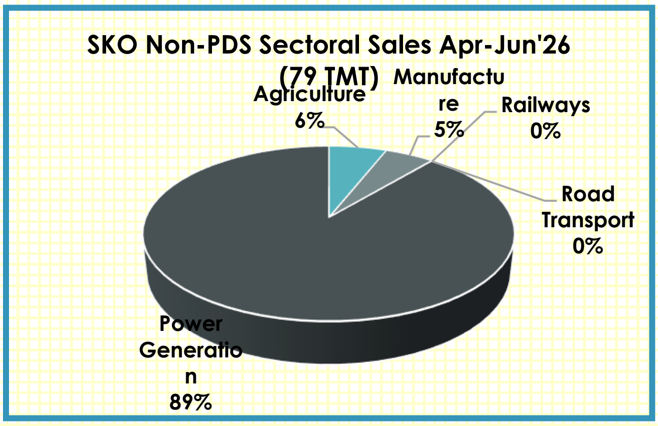


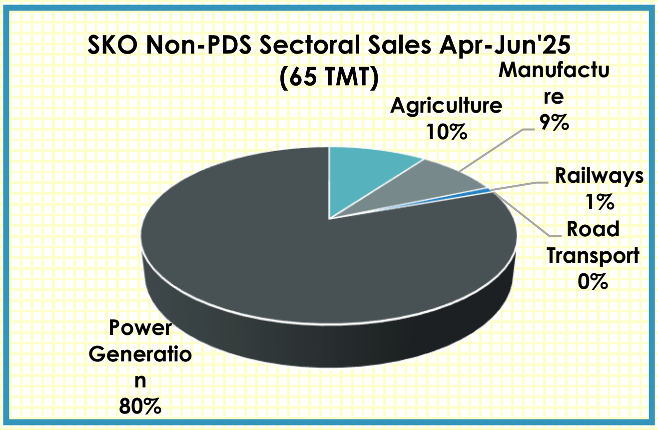


Sectoral consumption of SKO:

Out of total SKO sales during 'Apr-Jun'26 'PDS subsidized SKO' upliftment constituted 76%. So far as sales in 'Other SKO' is concerned,' agriculture accounted for 6% share, Manufacturing 5%, and Miscellaneous applications at 89%.

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





LUBES:

Lubes consumption with a volume of 371 TMT registered a de-growth of 5.5% in June 2026 as compared to June 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 June 2026 with a volume of 571 TMT registered a de-growth of 18.4% over the volume of 699 TMT in the month of June 2025.

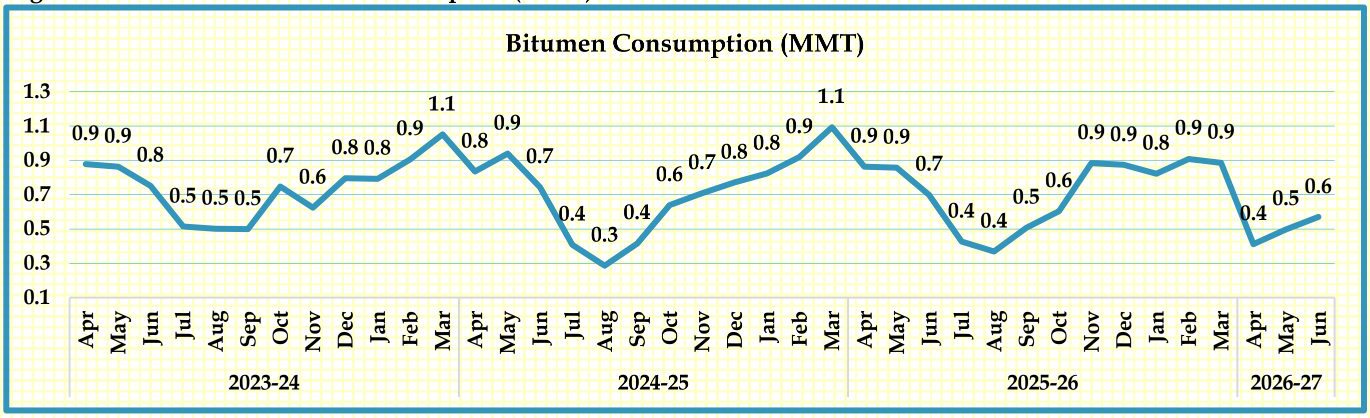
Bitumen registered a significant decline as ongoing geopolitical tension in Middle East severely disrupted the bitumen supply chain and resulted in price increase.

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 majority of states have been unable to absorb the fiscal shock, effectively pushing the pricing risk down the infrastructure delivery chain, some regions such as the **Union Territory of Ladakh, Punjab, Rajasthan, Kerala, Chhattisgarh,**

Tamil Nadu, and Jammu & Kashmir have actively deployed relief frameworks. Supported by central price-escalation directives from **MoRTH and NHAI**, these jurisdictions have introduced monthly cost-compensation mechanisms and rate-revision models to protect vital road construction projects.

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



Sectoral consumption of Bitumen:

During 'Apr-Jun-26, total bitumen consumption with a volume of 1481 TMT registered a de-growth of 38.7% Year-on Year basis over the volume of 2418 TMT in 'Apr-Jun-25.

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

LPG:

LPG consumption during the month of June 2026 with a volume of 2.19 MMT registered de-growth in the month at 14.3% over the volume of 2.55 MMT in the month of June 2025.

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 14.3% on account of the geo-political situation and booking interval restrictions in domestic and also due to the restrictions on the commercial & industrial supply.

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

1. 11.4% de-growth in Packed domestic LPG consumption in Jun'26 as compared to Jun'25.
2. **De-Growth of 18.0% in non-domestic packed segment.**
3. Under PMUY scheme 10.57 crores beneficiaries at the end of June 2026.
4. As on 1.07.2026, total active domestic connections in India are 3313.76 lakhs

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

   - **PMUY de-growth remained at 22.5%.**

   - Growth of 18.1% 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. 13.9 Crs cylinders of 14.2kg (~43.2 lacs/day) were delivered in Jun'26 compared to 15.7 Crs in Jun'25.

6. De-Growth of 81.9% 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 led to LPG demand suppression for commercial activities . In view of unavailability of LPG, Industrial consumers were actively migrating to alternative fuels like fuel oil and even NG to maintain baseline operations. Following steady arrival of imported cargoes as West Asia energy supply concerns receded. Government fully restored non-domestic packed commercial LPG supplies to pre-crisis levels and partially resumed bulk LPG allocations up to 50%. This policy shift eased commercial and industrial operating constraints.

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

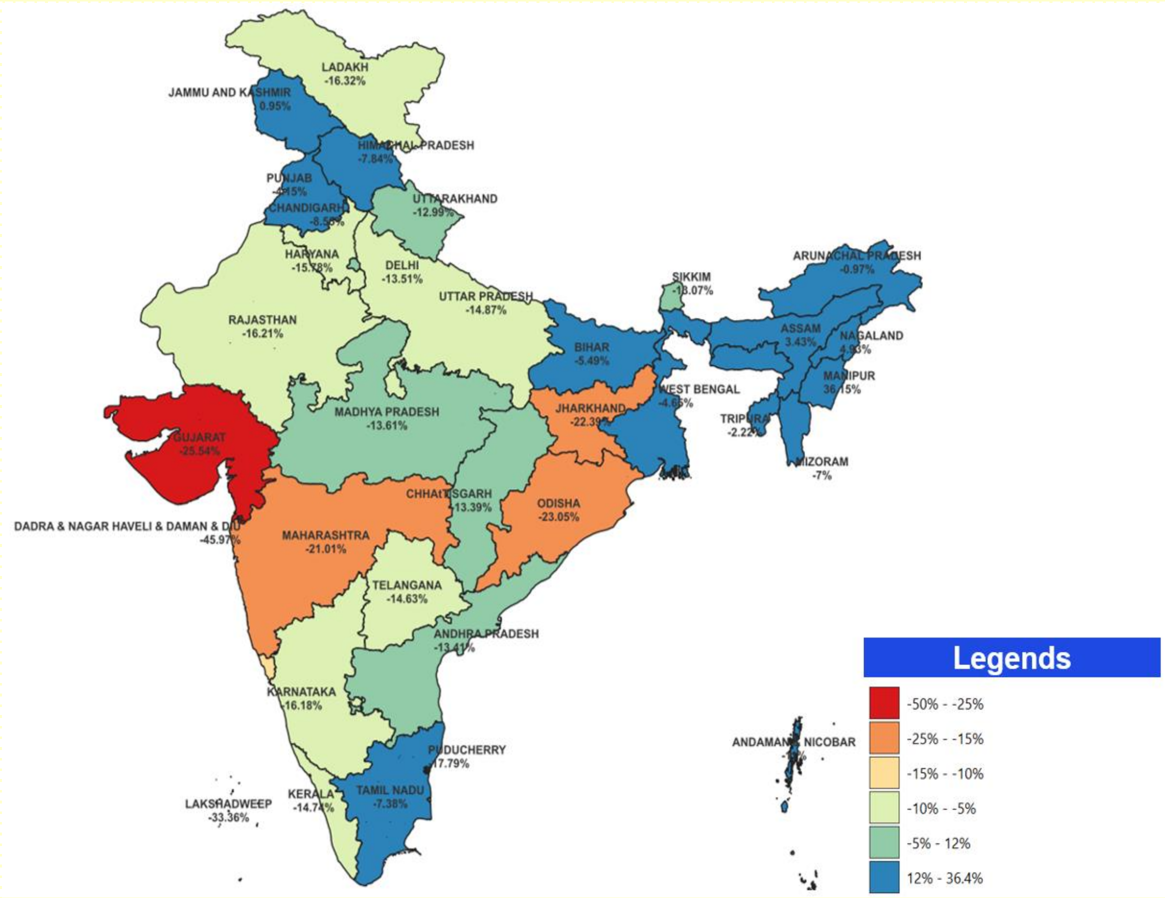
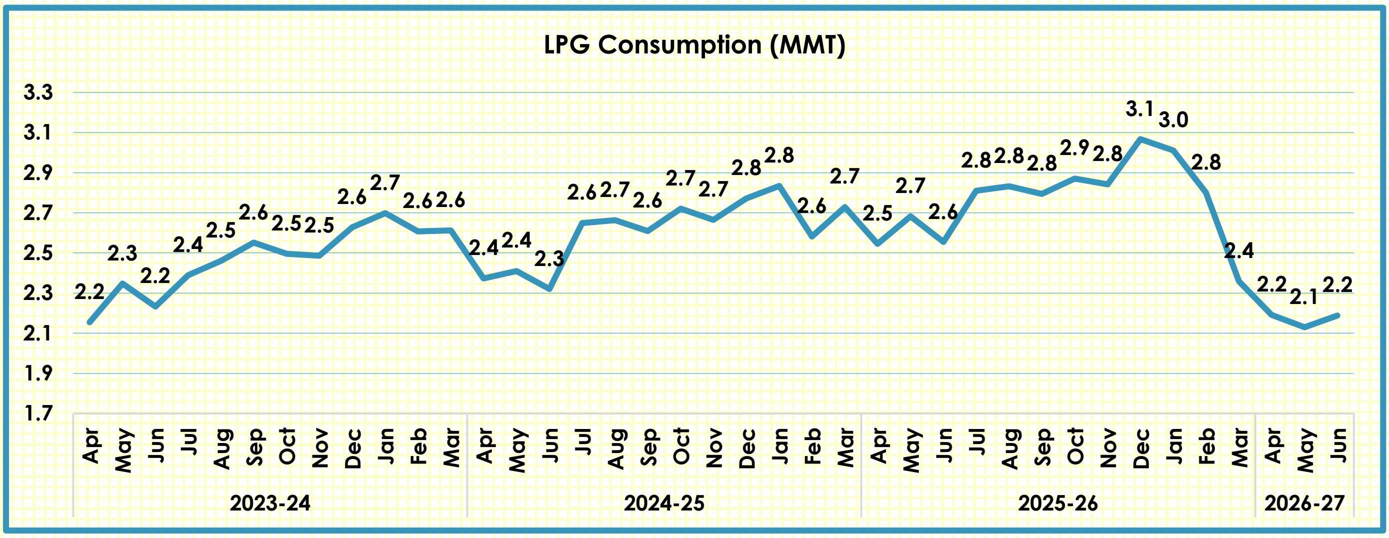


Figure-O: Month-wise LPG consumption (MMT)

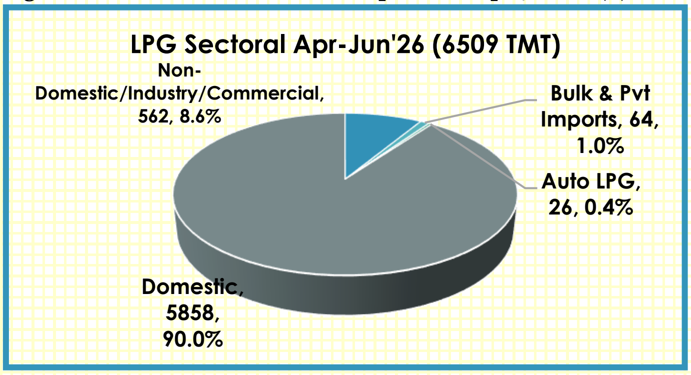


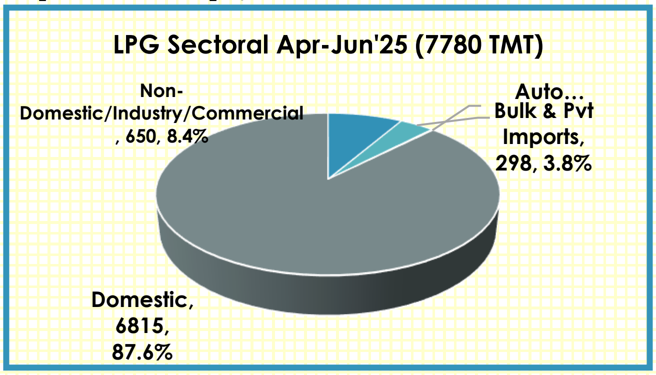
Sectoral consumption of LPG:

During 'Apr-Jun-26, total LPG domestic consumption with a volume of 6.51 MMT registered 11.1% de-growth Year-on Year basis over the volume of 7.78 MMT in 'Apr-Jun-25.

The Sectoral LPG consumption during 'Apr-Jun-26', was driven by Domestic packed at 90.0%, followed by LPG 'non-domestic/ industry/ commercial sector 8.6% & Bulk at 1.0%. Auto LPG at 0.4% has been on the negative trajectory getting displaced by CNG.

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





Naphtha:

Naphtha consumption during June 2026 with a volume of 562 TMT registered a de-growth of 42.8%, over a volume of 984 TMT during the month of June 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.

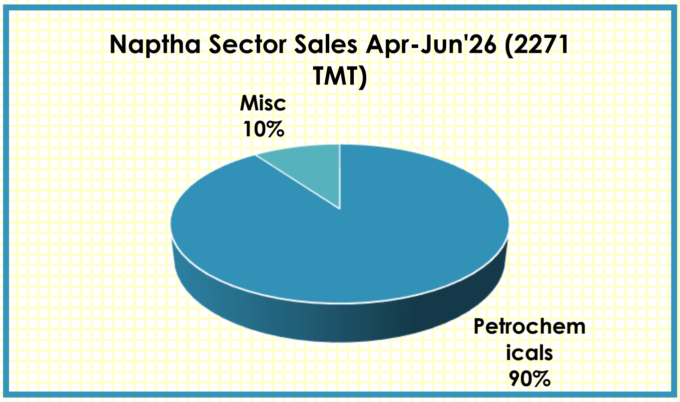
Major Petchem producers like HPL are operating below capacity with imported Naptha.

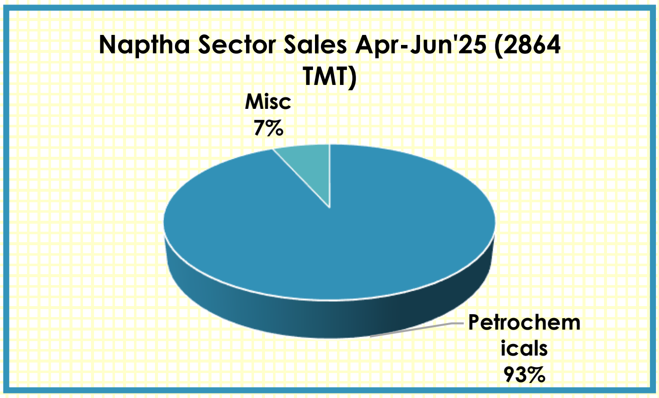
Sectoral consumption of Naphtha:

During 'Apr-Jun-26, total Naphtha domestic consumption with a volume of 2271 TMT registered de-growth of 20.7% Year-on Year basis over the volume of 2864 TMT in 'Apr-Jun-25.

90% Consumption of naphtha during this period was driven by petrochemicals sector.

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





ATF:

Aviation Turbine Fuel (ATF) consumption reached 731 TMT and registered a year-on-year increase of 0.04 % in June 2026.

This suppression in demand is driven by flight disruptions on account of airspace closures by several countries affecting international flights alongwith the flight cancelations 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 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.

Expanding surface transport networks—such as expressways, Dedicated Freight Corridors, and high-speed rail—is emerging as a compettitor to the Aviation sector affecting Aviation Turbine Fuel (ATF) demand. The migration of short-distance freight and passenger traffic away from regional air routes eliminates high-frequency, fuel-heavy takeoff cycles. Consequently, this shift acts as a drag on total aviation fuel consumption, limiting its broader growth trajectory especially in view of the current surge in prices.

Southern region recorded maximum degrowth in ATF volumes in May26. International Traffic recorded growth of by 4.4% in the month of May 2026 as per AAI data mentioned below in Table 8A.

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

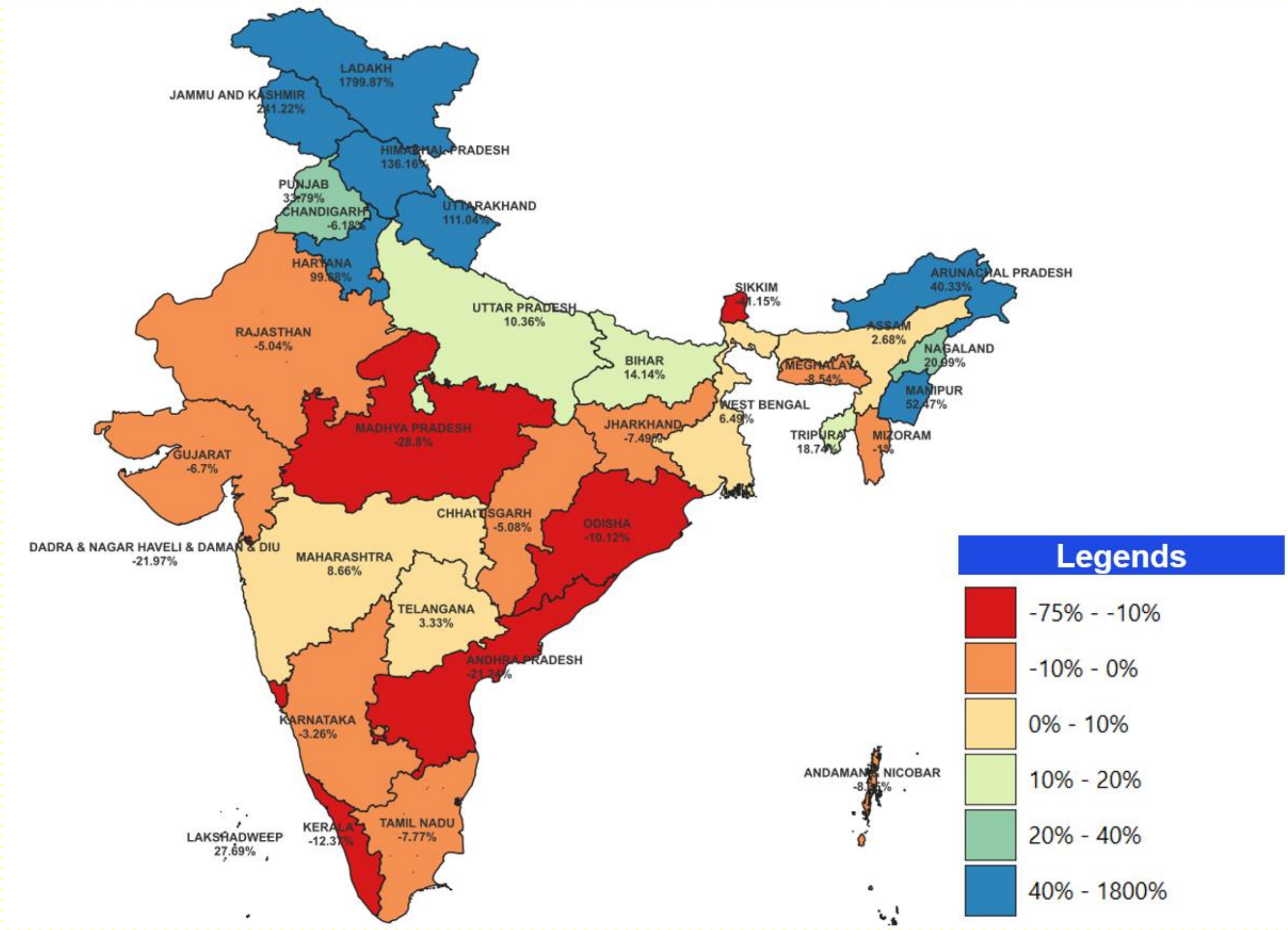
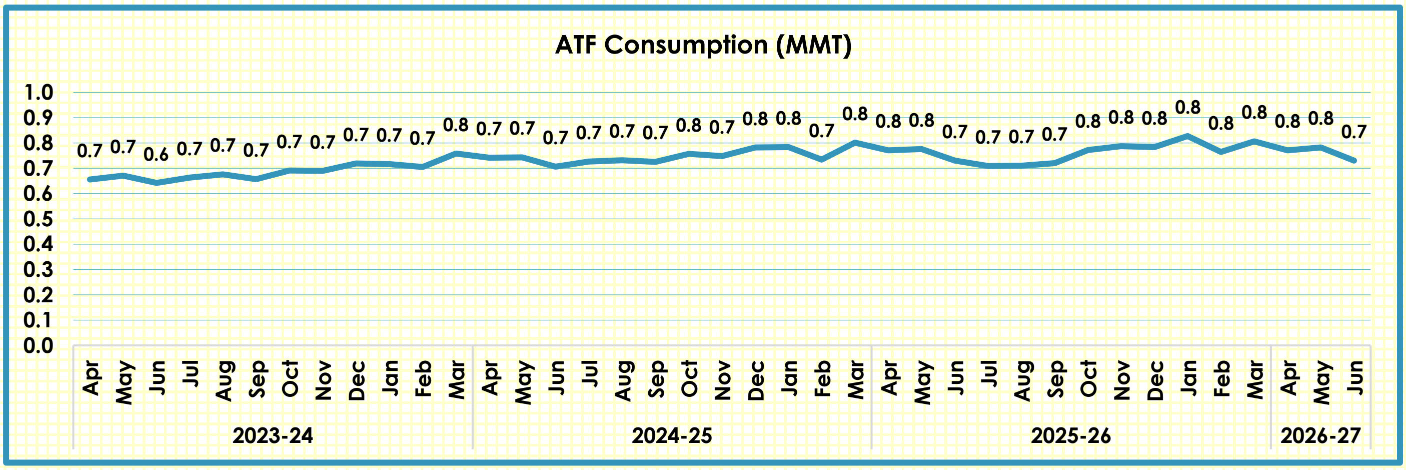


Figure-S: Month-wise ATF consumption (MMT) since Apr 2022

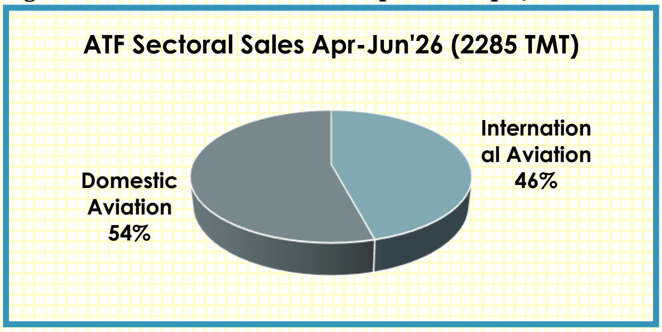


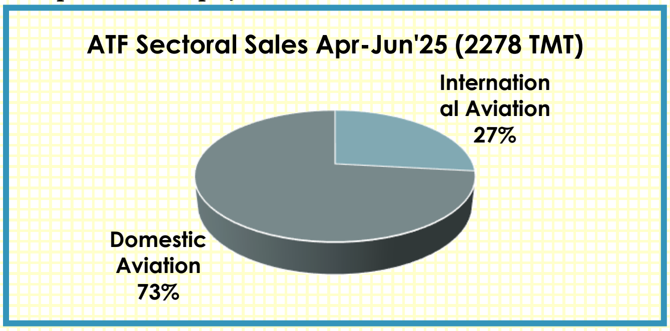
Sectoral consumption of ATF:

During 'Apr-Jun'26, total ATF domestic consumption with a volume of 2285 TMT registered 0.3% growth Year-on Year basis over the volume of 2278 TMT in 'Apr-Jun-25.

Almost entire ATF consumption during 'Apr-Jun-26 was attributed to aviation; 54% domestic aviation & 46% international 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-Jun'26 and its comparison to 'Apr-Jun'25





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

- During the month of May 2026, all operational airports (taken together) handled 254.17 thousand aircraft movements (excluding General Aviation Movements), 36.98 million passengers and 364.45 thousand tonnes of freight.
- International aircraft movements, total aircraft movements have decreased by 13.5%, 0.5% respectively and domestic aircraft movements have increased by 2.1% during (April-May) 2026-27 as compared to (April- May) 2025-26.
- Total passengers have decreased by 12.6%, 0.5% respectively and domestic passengers have increased by 2.4% during (April-May) 2026-27 as compared to (April- May) 2025-26.
- Domestic freight and total freight traffic have increased by 11.0%, 8.9% and 10.2% respectively during the period (April- May) 2026-27 as compared to (April- May) 2025-26.

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

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

CATEGORY	May		%
	2026-27	2025-26	CHANGE
Aircraft Movements (in '000)			
International	36.86	41.25	-10.6
Domestic	217.31	208.12	4.4
Total	254.17	249.37	1.9
General Aviation	29.45	29.21	0.8
Grand Total(INTL+DOM+Gen)	**283.62**	**278.58**	**1.8**

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

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

REGION WISE TRENDS IN AIR TRAFFIC vis-à-vis ATF Consumption								
May								
REGION	May		Change	REGION	May		Change	Difference
	2026-2027	2025-2026			2026-2027	2025-2026		
AIRCRAFT MOVEMENTS (IN NOS)				ATF CONSUMPTION (IN TMT)				
EASTERN	25791	26874	-4.0%	EASTERN	54	52	4.4%	-8.5%
NORTH EAST	6737	8353	-19.3%	NORTH EAST	18	16	13.3%	-32.6%
NORTHERN	57833	50073	15.5%	NORTHERN	284	277	2.7%	12.8%
SOUTHERN	65821	68079	-3.3%	SOUTHERN	222	236	-5.8%	2.4%
WESTERN	61122	54744	11.7%	WESTERN	204	195	4.6%	7.1%
Total	**217304**	**208123**	**4.4%**	**Total**	**783**	**776**	**0.9%**	**3.5%**

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 Jun 2026 with a volume of 499 TMT with a growth of 0.4 % over the volume of 498 TMT in Jun-2025.

FO/LSHS consumption pattern is attributed to consumption shift to lower emission fuels like Natural gas etc due to increased availability of gas coupled with banning of FO in various parts of the countrtry. Some companies shifted their internal fueling consumption from FO to CNG due to environmental obligations.

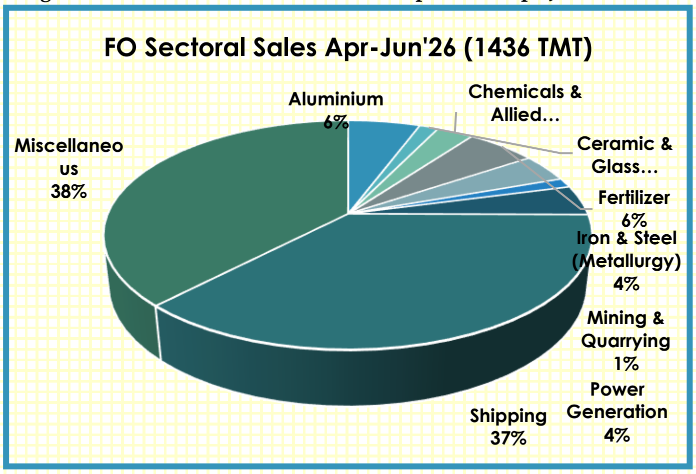
Sectoral consumption of FO/LSHS:

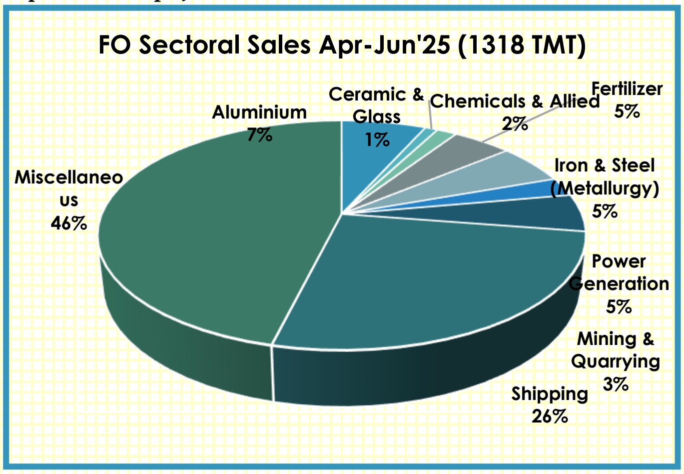
During 'Apr-Jun-26, total FO/LSHS consumption with a volume of 1603 TMT with a growth of 7.1% Year-on Year basis over the volume of 1496 TMT in 'Apr-Jun-25.

Further Product wise consumption for FO Apr-Jun'26 was 1436 TMT vs 1318 TMT in Apr-Jun'25 (8.95% growth). For LSHS, Apr-Jun'26 was 167 TMT vs 178 TMT in Apr-Jun'25 (6.2% De-growth).

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

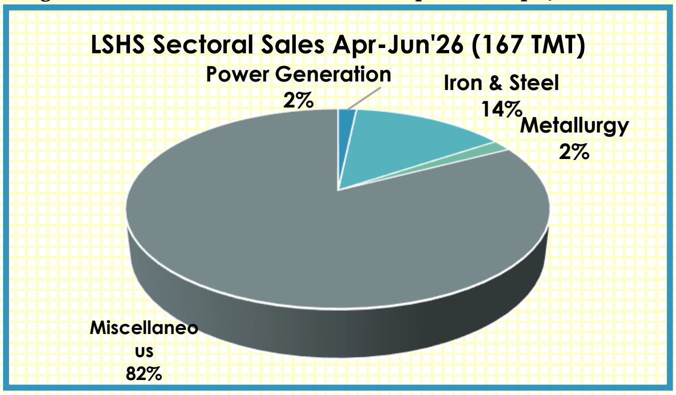
Figure-U: Sector wise FO+LSHS consumption of 'Apr-Jun'26 and its comparison to 'Apr-Jun'25

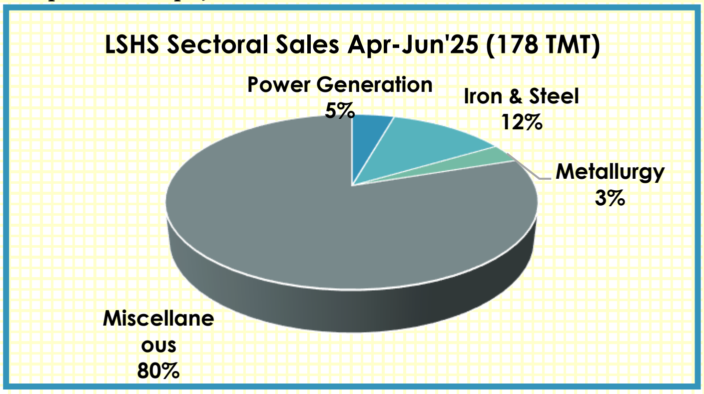




Apr-Jun'26:-	Apr-Jun'25:-
Shipping sector has a share of 37%, up from 26% from previous period followed by Iron & steel, fertilizer and Aluminium.	Shipping contributes the highest share with 26% followed by Iron & Steel Aluminium, Glass, Fertlizer & Power generation.

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





Apr-Jun'26:	Apr-Jun'25:
Iron & Steel sector contributed to be the largest sector at 14%, followed by Metallurgy 2%	Iron & steel contributes the highest share with 12% followed by Power generation & Metallurgy

Petcoke:

Petcoke consumption during the month of June 2026 with a volume of 1.50 MMT and de-growth of 0.2% over the volume of 1.50 MMT in the same period last year.

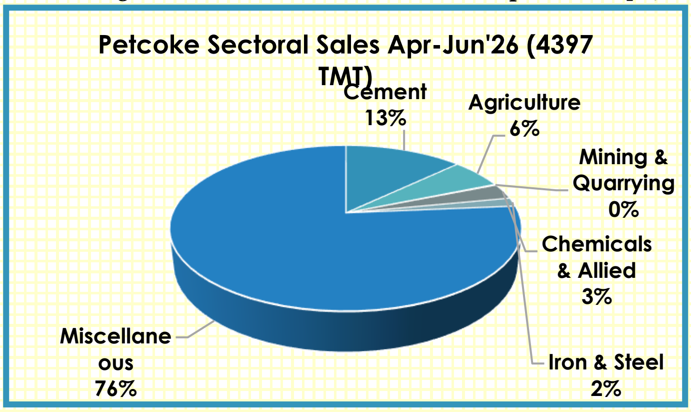
The Directorate General of Foreign Trade (DGFT) maintained strict allocation procedures and quantitative limits for the import of Raw Petroleum Coke (RPC) for the 2026-27 financial year, capping the potential volume of imports.

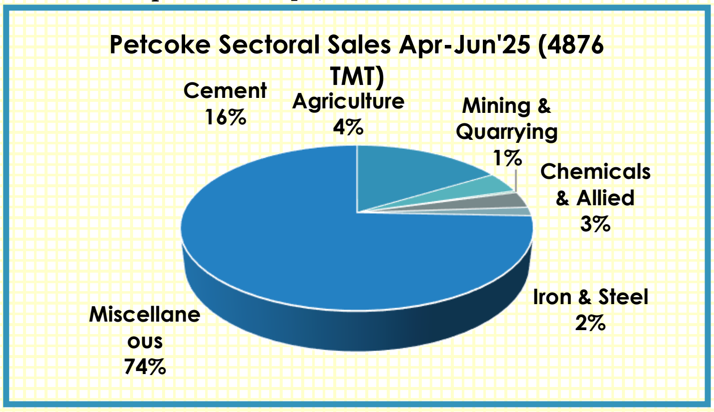
Various factors are attributed to Petcoke consumption trend: Petcoke consumption faced a significant decline by private importers as international prices remained firm. This led the cement sector to shift toward domestic thermal coal, which became more cost-effective.

Sectoral consumption of Petcoke:

During 'Apr-Jun-26', total Petcoke cumulative domestic consumption with a volume of 4.4 MMT registered 9.8% de-growth Year-on Year basis over the volume of 4.88 MMT in 'Apr-Jun-25'. The cement sector continues to occupy the largest share in 'Apr-Jun'26' (P) at 13%, followed by other Industries.

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





Apr-Jun'26:- Cement industry occupied the highest share at 13%	**Apr-Jun'25:-** Cement industry occupied the highest share at 16%, followed by other sectors.

Light Diesel Oil

LDO consumption during the month Jun 2026 with a volume of 46 TMT registered a 47.3% de-growth over the volume of 86 TMT in Jun 2025.

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

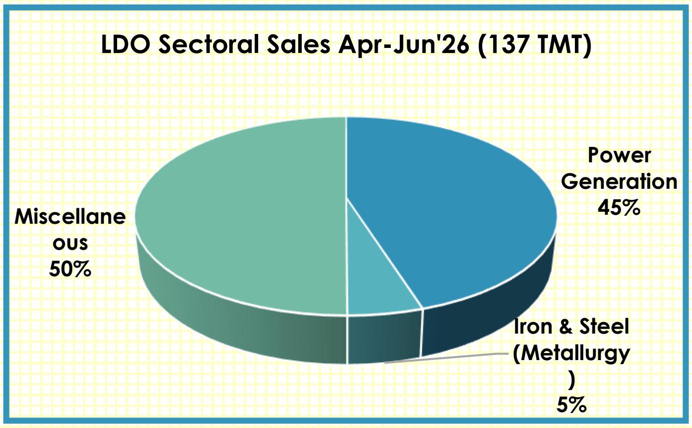
Although LDO has become the primary "cleaner" liquid fuel alternative for industrial boilers and heaters, but due to surge in prices consumers have shifted to alternate fuels including furnace oil.

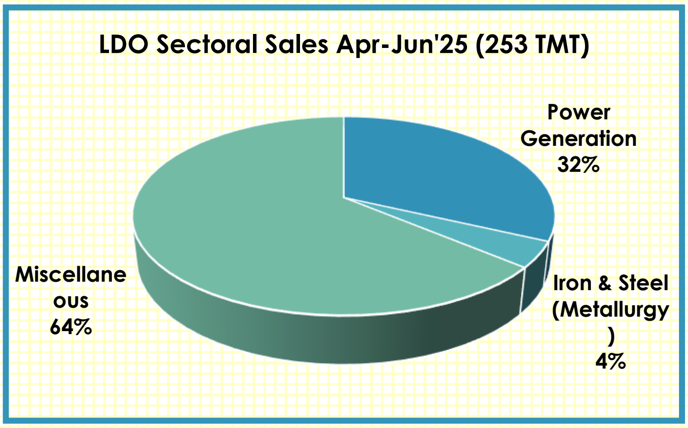
Sectoral consumption of Light Diesel Oil:

During 'Apr-Jun-26, total LDO domestic consumption with a volume of 137 TMT registered a 45.7% de-growth Year-on Year basis over the volume of 253 TMT in 'Apr-Jun-25.

The cumulative consumption of Light Diesel oil (LDO) during 'Apr-Jun'26' was driven by 'Power Generation' 45% followed by Iron & Steel at 5%.

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





Apr-Jun-26:-Power Generation occupied a 45% share of the product followed by Iron & Steel & Misc industries	**Apr-Jun-25**:-Power Generation occupied a 32% 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.

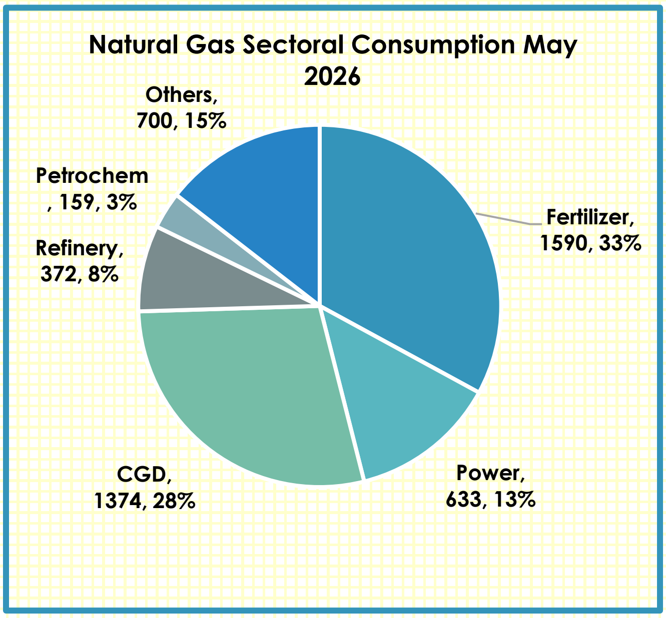
For the monthly consumption data, please refer to the NG report published by PPAC.

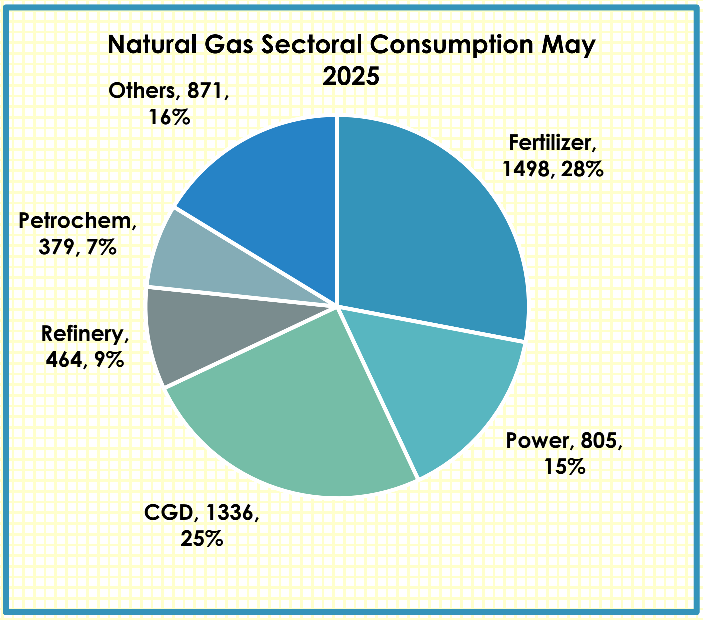
'Total Natural Gas Consumption (including internal consumption) for the month of Jun 2026 (P) was 5360 MMSCM which was 4.52% lower than the corresponding month of the previous year.

Sectoral consumption of Natural Gas consumption of Apr-May'26'& its comparison to 'Apr-May'25 (P): During Apr-May'26, total Natural Gas monthly domestic consumption with a volume of 5,238 MMSCM, over the volume of 5,851 MMSCM during the same period in the preceding year .During Apr-May'26, consumption of Natural gas (NG) was driven by fertilizer (33%) followed by CGD (28%), Power (13%) Refinery (8%), Petrochemicals (3%). Misc sectors occupied a share of 15% in Apr-May'2026.

As per IGX, Indian Natural Gas average spot purchase price for the month of Jun 2026 was 18.6 $/MMBtu.

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





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

P: provisional

May'2026 Fertilizer sector occupied the highest share for the Consumption of Natural Gas at 33% with the share of CGD increasing steadily.	***May'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-Jun			June								
	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	7780	6509	-16.3	2225	2233	2320	2554	2188	-1.7	-2.0	-5.7	-14.3
SKO	105	93	-11.9	45	51	36	41	33	-27.7	-35.9	-9.9	-20.0
Sub Total	**7886**	**6602**	**-16.3**	**2271**	**2284**	**2356**	**2595**	**2221**	**-2.2**	**-2.8**	**-5.7**	**-14.4**
(B) Major Decontrolled Product												
HSD	24959	25663	2.8	7674	7906	7982	8105	8605	12.1	8.8	7.8	6.2
MS	10753	11378	5.8	2968	3152	3296	3522	3784	27.5	20.1	14.8	7.5
Naphtha	2864	2271	-20.7	948	1057	1014	984	562	-40.7	-46.8	-44.5	-42.8
ATF	2278	2285	0.3	588	642	707	730	731	24.2	13.7	3.3	0.0
Bitumen	2418	1481	-38.7	690	752	744	699	571	-17.3	-24.1	-23.3	-18.4
FO & LSHS	1496	1603	7.1	550	511	575	498	499	-9.2	-2.3	-13.1	0.4
Lubricants & Greases	1155	1111	-3.8	290	319	436	393	371	27.8	16.4	-15.0	-5.5
LDO	253	137	-45.7	57	66	65	86	46	-20.7	-31.2	-30.0	-47.3
Sub Total	**46176**	**45929**	**-0.5**	**13766**	**14405**	**14819**	**15017**	**15169**	**10.2**	**5.3**	**2.4**	**1.0**
Sub - Total (A) + (B)	**54062**	**52531**	**-2.8**	**16037**	**16689**	**17175**	**17612**	**17390**	**8.4**	**4.2**	**1.3**	**-1.3**
(C) Other Minor Decontrolled Products												
Petroleum coke	4876	4397	-9.8	1297	1596	1532	1504	1500	15.7	-6.0	-2.0	-0.2
Others	2637	1591	-39.7	1191	1198	1230	926	533	-55.2	-55.5	-56.7	-42.4
Sub Total	**7513**	**5988**	**-20.3**	**2488**	**2794**	**2762**	**2430**	**2034**	-18.3	-27.2	-26.4	-16.3
Total	**61575**	**58520**	**-5.0**	**18525**	**19483**	**19937**	**20042**	**19424**	**4.9**	**-0.3**	**-2.6**	**-3.1**

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

Table-11

Product	April-Jun			June								
	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
Industry Consumption Trend Analysis 2025-26 (Provisional)												
('Million Barrels per Day)												
(A) Sensitive Products												
LPG	0.99	0.83	-16.3%	0.86	0.86	0.90	0.99	0.85	-1.7%	-2.0%	-5.7%	-14.3%
SKO	0.01	0.0082	-11.9%	0.01	0.01	0.01	0.01	0.01	-27.7%	-35.9%	-9.9%	-20.0%
Sub Total	**1.0**	**0.8**	**-16.3%**	**0.9**	**0.9**	**0.9**	**1.0**	**0.9**	**-2.1%**	**-2.5%**	**-5.7%**	**-14.4%**
(B) Major Decontrolled Product												
HSD	2.09	2.15	2.8%	1.95	2.01	2.02	2.06	2.18	12.1%	8.8%	7.8%	6.2%
MS	1.05	1.11	5.8%	0.88	0.93	0.98	1.04	1.12	27.5%	20.1%	14.8%	7.5%
Naphtha	0.27	0.22	-20.7%	0.28	0.31	0.29	0.29	0.16	-40.7%	-46.8%	-44.5%	-42.8%
ATF	0.20	0.20	0.3%	0.16	0.17	0.19	0.20	0.20	24.2%	13.7%	3.3%	0.0%
Bitumen	0.16	0.10	-38.7%	0.14	0.15	0.15	0.14	0.12	-17.3%	-24.1%	-23.3%	-18.4%
FO & LSHS	0.11	0.12	7.1%	0.12	0.11	0.13	0.11	0.11	-9.2%	-2.3%	-13.1%	0.4%
Lubricants & Greases	0.09	0.09	-3.8%	0.07	0.08	0.11	0.09	0.09	27.8%	16.4%	-15.0%	-5.5%
LDO	0.02	0.01	-45.7%	0.01	0.02	0.02	0.02	0.01	-20.7%	-31.2%	-30.0%	-47.3%
Sub Total	**4.0**	**4.0**	**-0.1%**	**3.6**	**3.8**	**3.9**	**4.0**	**4.0**	**10.7%**	**5.6%**	**2.7%**	**1.0%**
Sub - Total (A) + (B)	**5.0**	**4.8**	**-3.3%**	**4.5**	**4.7**	**4.8**	**4.9**	**4.8**	**8.2%**	**4.1%**	**1.1%**	**-2.1%**
(C) Other Minor Decontrolled Products												
Petroleum coke	0.30	0.27	-9.8%	0.24	0.29	0.28	0.28	0.28	15.7%	-6.0%	-2.0%	-0.2%
Others	0.23	0.14	-39.7%	0.32	0.32	0.33	0.25	0.14	-55.2%	-55.5%	-56.7%	-42.4%
Sub Total	**0.5**	**0.4**	**-23.0%**	**0.6**	**0.6**	**0.6**	**0.5**	**0.4**	**-24.9%**	**-31.9%**	**-31.5%**	**-20.2%**
Total	**5.5**	**5.24**	**-5.2%**	**5.0**	**5.3**	**5.4**	**5.5**	**5.3**	**4.5%**	**-0.1%**	**-2.6%**	**-3.8%**

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

Petroleum Planning & Analysis Cell
Ministry of Petroleum & Natural Gas, Government of India
Har Kaam Desh Ke Naam

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