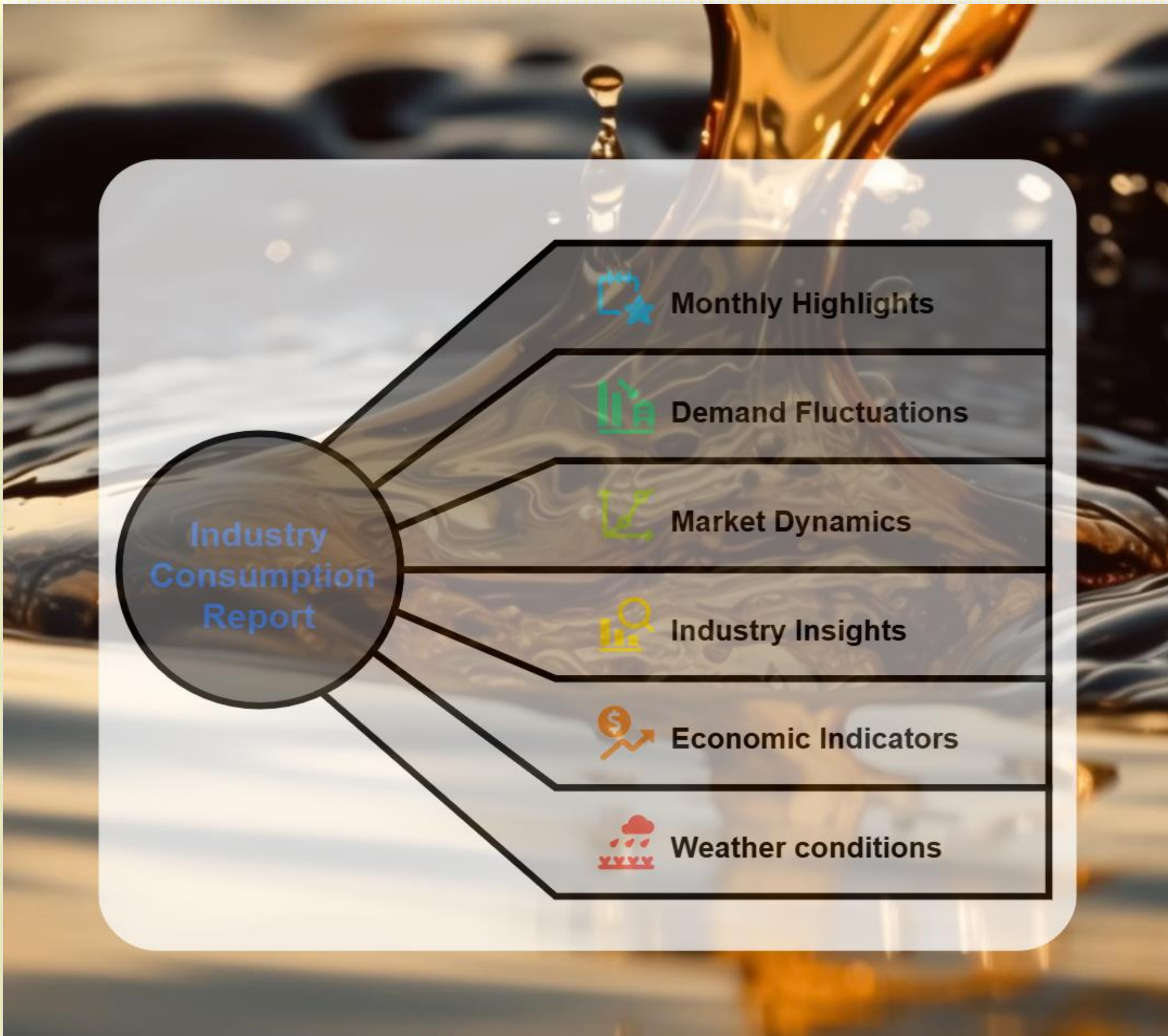


INDUSTRY CONSUMPTION REPORT POL & NG

August 2026

Contents

List of Tables

List of Figures

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: August 2026

The monthly Petroleum Industry Consumption Review Report has been prepared by the Petroleum Planning and Analysis Cell (PPAC) for the month of August 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 Anuj Jain, Sandesh Mane-HPCL, Shri Manoj Kumar Jha-BPCL, Chaitanya Singh-ONGC & Bhaskar Bhargav-GAIL.

If you have any question on this report, please write at demand.es-officer1@ppac.gov.in

धन्यवाद,

Thanking you,

राज शेखर
संयुक्त निदेशक (मांग एवं आर्थिक अध्ययन)
Raj Shekhar
Joint Director (Demand & Economic Studies)

Highlights of the month: August-2026

- **Commercial Crude Production Commenced at Ashoknagar:** ONGC commenced commercial crude-oil production from the Ashoknagar field at Baigachhi in North 24 Parganas, West Bengal. The development marks the commencement of commercial hydrocarbon production from the Bengal Basin and is an important step towards expanding domestic crude-oil output.

- **Major Expansion of LPG Pipeline Infrastructure:** PNGRB authorised GAIL to develop approximately **1,800 km of LPG pipelines** across three routes—Cherlapally–Nagpur, Jhansi–Sitarganj and Shikrapur–Goa/Hubli—at an estimated investment of around **₹7,000 crore**. The projects are expected to increase India's common-carrier LPG pipeline network from approximately **7,700 km to 9,500 km**, reduce dependence on road tankers, lower transportation costs and emissions, and strengthen the reliability of LPG supplies.

- **Inauguration of Bhogapuram Greenfield Airport:** The **Alluri Sitarama Raju International Airport at Bhogapuram, Andhra Pradesh** was inaugurated in Aug'26 with an investment of over **₹5,640 crore**. The greenfield airport has an initial capacity of around **6 million passengers annually** and incorporates modern digital and sustainability features.

- ONGC and **Shell** have signed an MoU to explore collaboration in **deepwater exploration and production, LNG, and related energy opportunities**, aimed at strengthening technical cooperation and energy security.

- **Vehicle Retail Sales:** Vehicle retail sales reached a record **24.23 lakh units in August 2026**, registering **17.51% YoY growth**. Passenger-vehicle retail sales increased by **16.14% to 4.02 lakh units**. Alternative-fuel vehicles collectively accounted for **41.95%** of PV registrations, marginally exceeding the **40.85% share of petrol/ethanol vehicles.**

- **Manufacturing PMI:** India's Manufacturing PMI declined to **52.8 in August 2026**, from **53.5 in July**, while remaining above the neutral level of 50. The reading indicated continued expansion in manufacturing activity, although growth in output and new orders moderated and employment declined amid softer demand conditions.

- **GST Collections:** Gross GST collections increased by **14.8% YoY to approximately ₹2.00 lakh crore in August 2026**, compared with ₹1.74 lakh crore in August 2025. Domestic receipts increased by **9.3%**, while revenue from imports rose by around **29%**, reflecting sustained commercial activity and stronger import-related tax collections.

- **Electricity Demand:** India's electricity consumption reached a record **169 BU in August 2026**, increasing by approximately **12.8% YoY**, while peak demand rose to around **258 GW**.

- **Strong Q1 Economic Growth:** India's real GDP grew by **7.8% in Q1 of FY 2026-27**, compared with **6.9%** in the corresponding period of the previous year. Manufacturing grew by **9.2%**, while the broader tertiary sector expanded by **10.0%**, supporting the outlook for freight, mobility and commercial energy demand.

- **Inflation:** India's CPI inflation rose to **4.82% in August 2026** from **4.45% in July**, remaining within the RBI's **2–6% tolerance band**. Food inflation increased to **5.95%**, with rural and urban inflation at **5.23%** and **4.31%**, respectively.

- ONGC has completed drilling of its second geothermal well at **Puga Valley, Ladakh**, advancing India's efforts to assess and develop geothermal energy potential in the region.

SUMMARY OF PRODUCT WISE POL

1. The consumption of petroleum products in August 2026 with a volume of 18.61 MMT registered a de-growth of 2.8% against the historical of 19.14 MMT in August 2025.

2. MS (Petrol) consumption during the month of August 2026 with a volume of 3.84 MMT (1.10 mbpd) recorded a growth of 8.2% on the volume of 3.54 MMT (1.02 mbpd) in August 2025.

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

4. August'26 recorded the highest-ever August auto retail sales in India, with 24,23,201 units, up 17.51% YoY, despite a 6.48% decline from the record July level. Growth was led by Wheeled Construction Equipment (+31.45%), followed by Two-Wheelers (+19.69%), Passenger Vehicles (+16.14%), Commercial Vehicles (+14.45%) and Three-Wheelers (+8.64%)..

5. HSD (Diesel) consumption during the month of August 2026 with a volume of 7.02 MMT (1.72 mbpd) registered growth of 6.8% over the volume of 6.58 MMT (1.61 mbpd) in the month of August 2025.

6. LPG consumption during the month of August 2026 with a volume of 2.35 MMT registering a de-growth of 17.1% over the volume of 2.83 MMT in August 2025.

7. ATF consumption during August 2026 with a volume of 726 TMT recorded modest growth of 2.1%. ATF recorded a volume of 710 TMT during the month of August 2025.

8. Bitumen consumption during August 2026 with a volume of 442 TMT registered a growth of 20.0% over the volume of 369 TMT in the month of August 2025.

9. Kerosene (SKO) consumption with a volume of 40 TMT registered a growth of 17.2% in August 2026 as compared to August 2025. SKO consumption during the month is largely constituted by PDS category with a 57% share.

10. 'Total Natural Gas Consumption (including internal consumption) for the month of Aug 2026 (P) was 5708 MMSCM which was 2.39% lower than the corresponding month of the previous year.

11. As on 30th August 2026, number of active LPG domestic connections are 32.776 cr and PMUY connections 10.57 cr.

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

Product	Aug (TMT)				April-Aug (TMT)			
	2025	2026	% share of Aug'26	Growth (%)	2025-26	2026-27	Growth (%)	% share of Apr-Aug'26
(A) Sensitive Products								
LPG	2833	2347	12.6	-17.1	13423	11172	-16.8	11.6
SKO	34	40	0.2	17.2	176	177	0.4	0.2
Sub Total	2867	2388	12.8	-16.7	13599	11349	-16.5	11.8
(B) Major Decontrolled Product								
HSD	6577	7023	37.7	6.8	38891	40774	4.8	42.4
MS*	3544	3836	20.6	8.2	17791	19029	7.0	19.8
Naphtha	1065	828	4.4	-22.3	4891	4166	-14.8	4.3
ATF	710	726	3.9	2.1	3698	3716	0.5	3.9
Bitumen	369	442	2.4	20.0	3213	2166	-32.6	2.3
FO/LSHS	501	525	2.8	4.9	2486	2733	9.9	2.8
Lubes+Greases	373	416	2.2	11.6	1921	1820	-5.2	1.9
LDO	80	47	0.3	-41.8	419	250	-40.3	0.3
Sub Total	13219	13843	74.4	4.7	73310	74654	1.8	77.6
(C) Other Minor Decontrolled Products								
Pet.Coke	2239	1599	8.6	-28.6	8835	6815	-22.9	7.1
Others*	818	777	4.2	-5.0	4329	3342	-22.8	3.5
Sub Total	3056	2376	12.8	-22.3	13164	10157	-22.8	10.6
Total	**19143**	**18606**	**100**	**-2.8**	**100073**	**96160**	**-3.9**	**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 Jun'26-Jul'26, which may undergo change on receipt of actual data), and

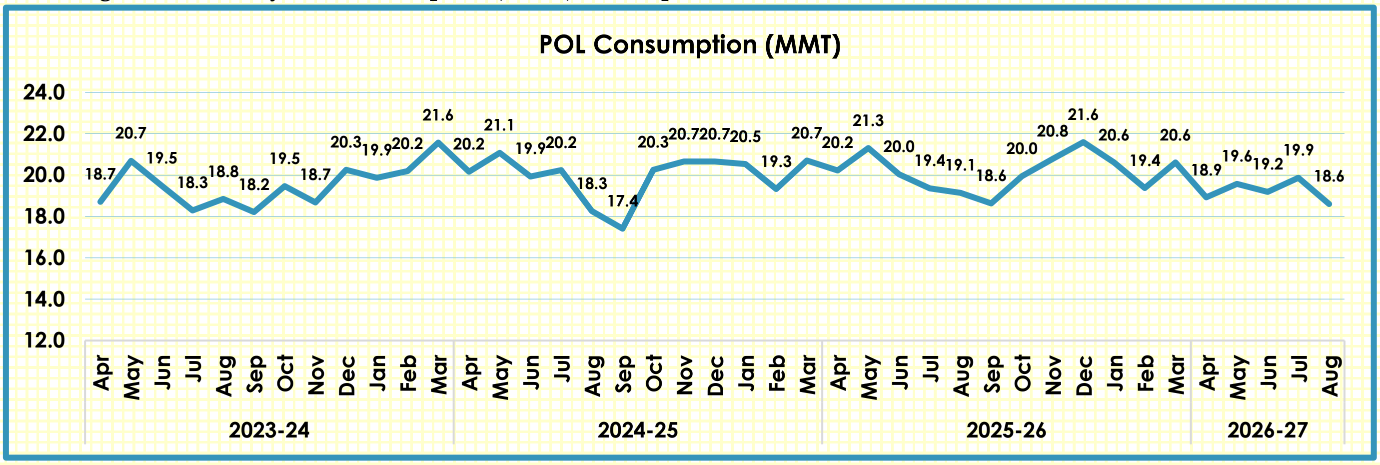
(c) MS Sales includes Ethanol Blending .

India's petroleum product consumption in August 2026 was 18.61 million metric tonnes with 2.8% de-growth over August 2025. The consumption on the growth side was primarily driven by higher demand for MS at 8.2% and HSD at 6.8%. The de-growth in POL consumption was led by lower offtake in Petcoke, Naphtha & 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.

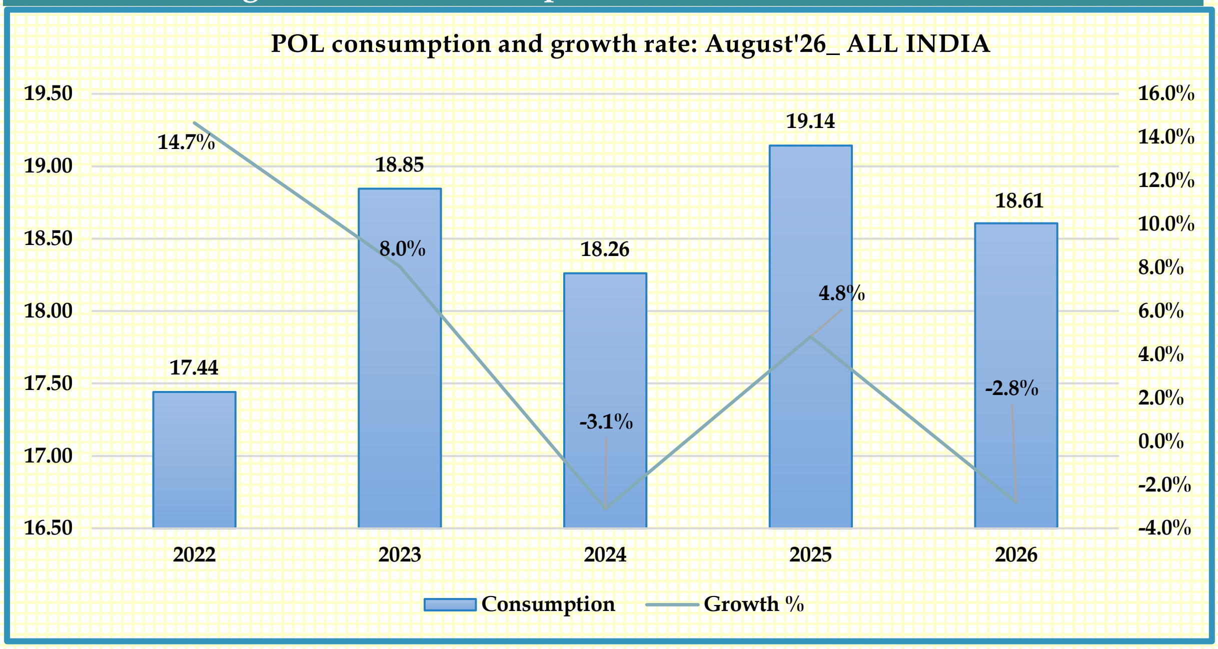
Pan India based domestic POL monthly consumption trend since April-2023 is shown in Figure-A.

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



- ✓ The overall POL domestic consumption profile of the August 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 August 2026 with a volume of 3.84 MMT recorded a growth of 8.2% on the volume of 3.54 MMT in August 2025.

PSU's registered a growth rate of 9.2% as against 0.8% de-growth by their private sector counterparts in Aug-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 16.14% and 2W by 19.69% in Aug 26.
- The growth continues to be driven by sustained personal mobility including shift from air transport mode to road and continued economic activity across the services sector, all of which contributed to the overall rise in consumption. Festive-season

travel and mobility, particularly around Onam and Raksha Bandhan, also supported demand for MS during the month, along with the structural expansion of MS fueled vehicle fleet (**robust 15.9% growth in 2W segment & 2.32% growth in Petrol fueled PV**).

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

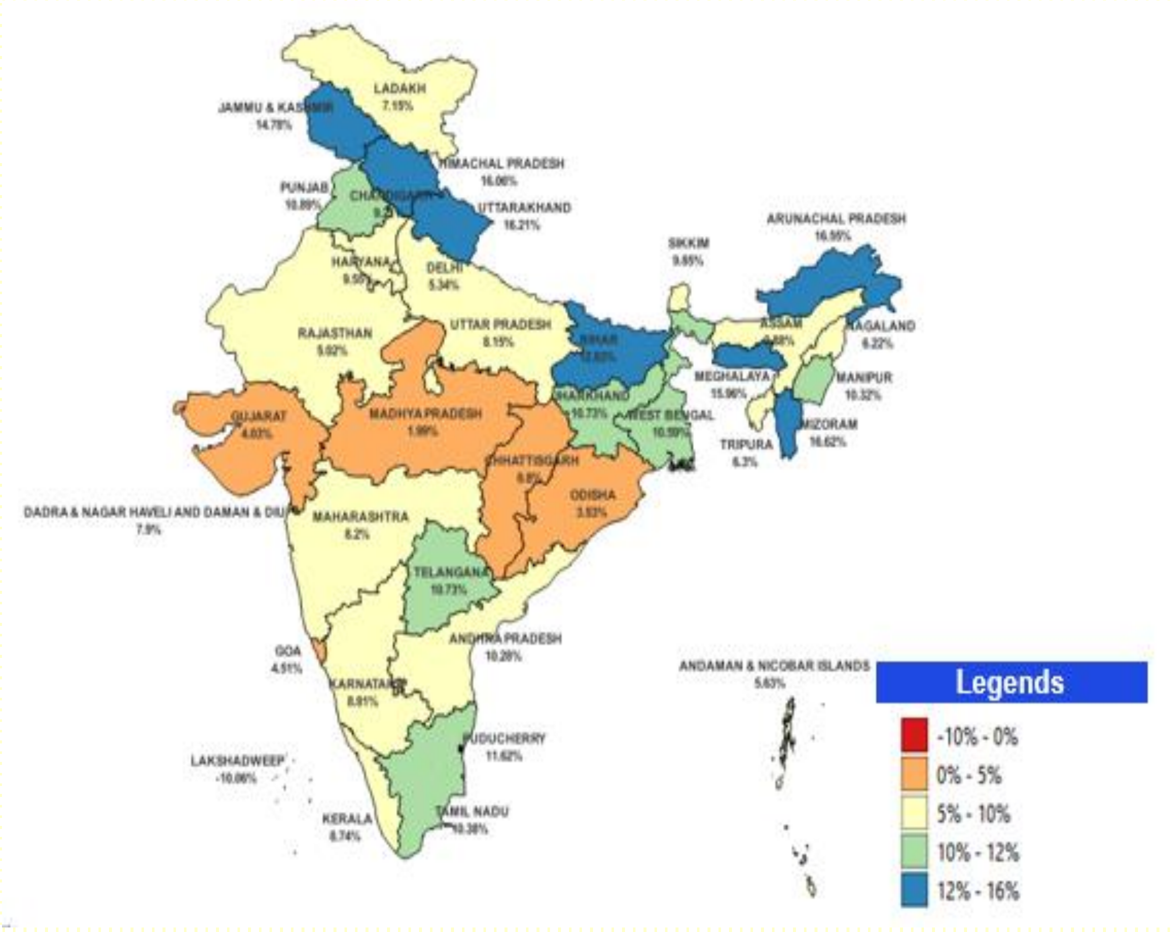
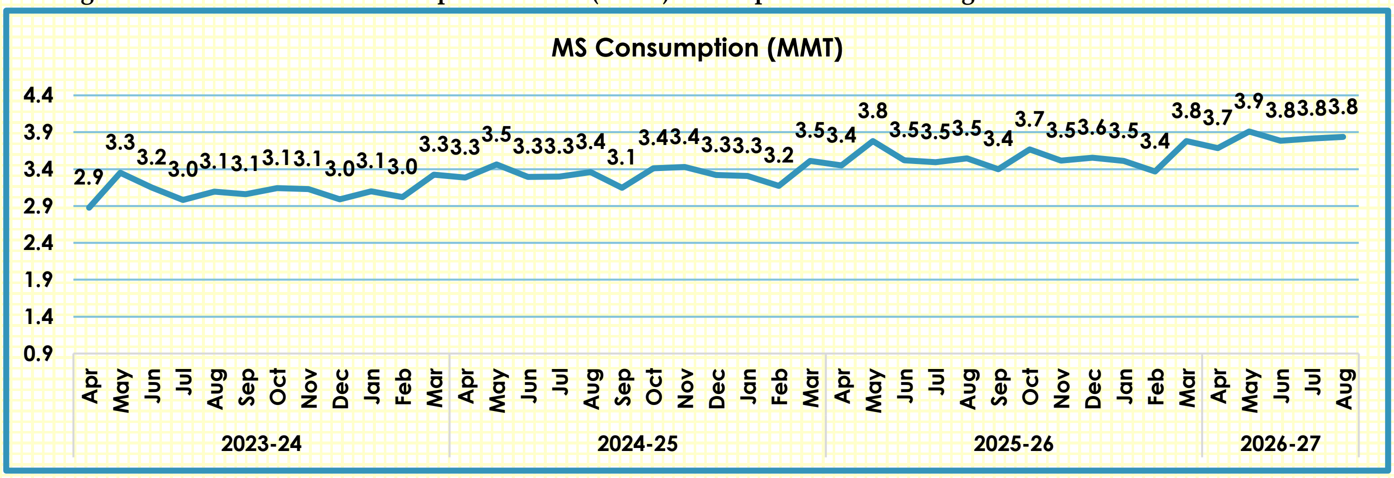


Figure-D: Month wise MS consumption volume (MMT) from April- 2023 to till August-2026



Factors impacting consumption of MS:

Passenger Vehicle Sales:

The Sale of Passenger Vehicles in August 2026 at 4.02 lacs registered 16.1% growth YoY in the month of August 25. Passenger Vehicle (PV) sales in August 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 August 2026 (Primary sales data)

	August'26		
Vehicle Segment	2025	2026	Growth %age
Total PV	346,468	402,398	16.1%

Source: FADA

Two-Wheeler Sales:

Two-wheeler sales in August 2026 with a volume of 17.15 lacs registered a robust 19.7% growth, YoY basis over volume of 14.33 lacs during August 2025.

Three-Wheeler sales

Three-wheeler domestic sales in August 2026 with a volume of 1.22 lac recorded a growth of 8.6 %, YoY basis over the volume of 1.13 lacs in August 2025

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

CATEGORY	August 25	August 26	Growth %
2W	1,432,537	1,714,610	19.7%
Passenger Carrier-3 W	59,017	72,657	23.1%
Goods Carrier-3 W	10,237	14,614	42.8%
E-Rickshaw	36,957	28,816	-22.0%
E-cart	6,214	6,029	-3.0%
Personal- 3 wheeler	128	165	28.9%
Total Three Wheelers	112,553	122,281	8.6%

Source: FADA

High Speed Diesel (HSD):

HSD (Diesel) consumption during the month of August 2026 with a volume of 7.02 MMT, registered a robust growth of 6.8% on the volume of 6.58 MMT in the month of August 2025.

PSUs registered a 10.3% growth and private sector witnessed 17.1% de-growth in the month of Aug-26.

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

- While increased mechanization of agriculture sector, infrastructure projects and road freight continue to support demand, the robust growth was supported primarily by sustained economic activity, improved industrial and manufacturing output, increased freight movement across the country.
- The ongoing construction of Google's large-scale AI and data-centre hub in Visakhapatnam, Solar parks and supporting activities in the state of Rajasthan have contributed to incremental diesel demand.
- HSD consumption in few states particularly in **Andhra Pradesh** was also supported by increased activity in the **fisheries and aquaculture sector**, aided by continued government support, including fisheries infrastructure development and diesel subsidy for fishing boats.
- In states like Uttar Pradesh, HSD consumption growth remained subdued in August 2026, primarily due to disruptions in freight movement from **Kanwar Yatra-related vehicle restrictions and flooding**, which affected road transport and potentially diverted refuelling

outside the state. Heavy rainfall and flooding also disrupted **transport, construction and agricultural activities** during the second half of the month. In addition, the **completion of the 594-km Ganga Expressway in April 2026** resulted in the loss of the associated construction-related diesel demand that supported the August 2025 base.

- Agricultural demand also remained firm owing to increased mechanization fueled by GST 2.0, resulting in higher diesel usage for irrigation activities. Mining activities in state like Rajasthan, Jharkhand and Odisha remained firm amid delayed/ deficient rainfall, supporting higher diesel consumption for mining equipment, material handling and transportation.

- In retail sales, PSU OMCs recorded a sales growth of **15.5%**, while private OMC retail sales declined by **8.8%**, leading to an increase in PSU/JV retail market share to around **82%**. In the direct sales segment, private OMCs registered a de-growth of **52.5%**, whereas PSU OMCs recorded a de-growth of **24.7%** during the month. Overall direct sales dropped by **29.7%** YoY.

- 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 August-26

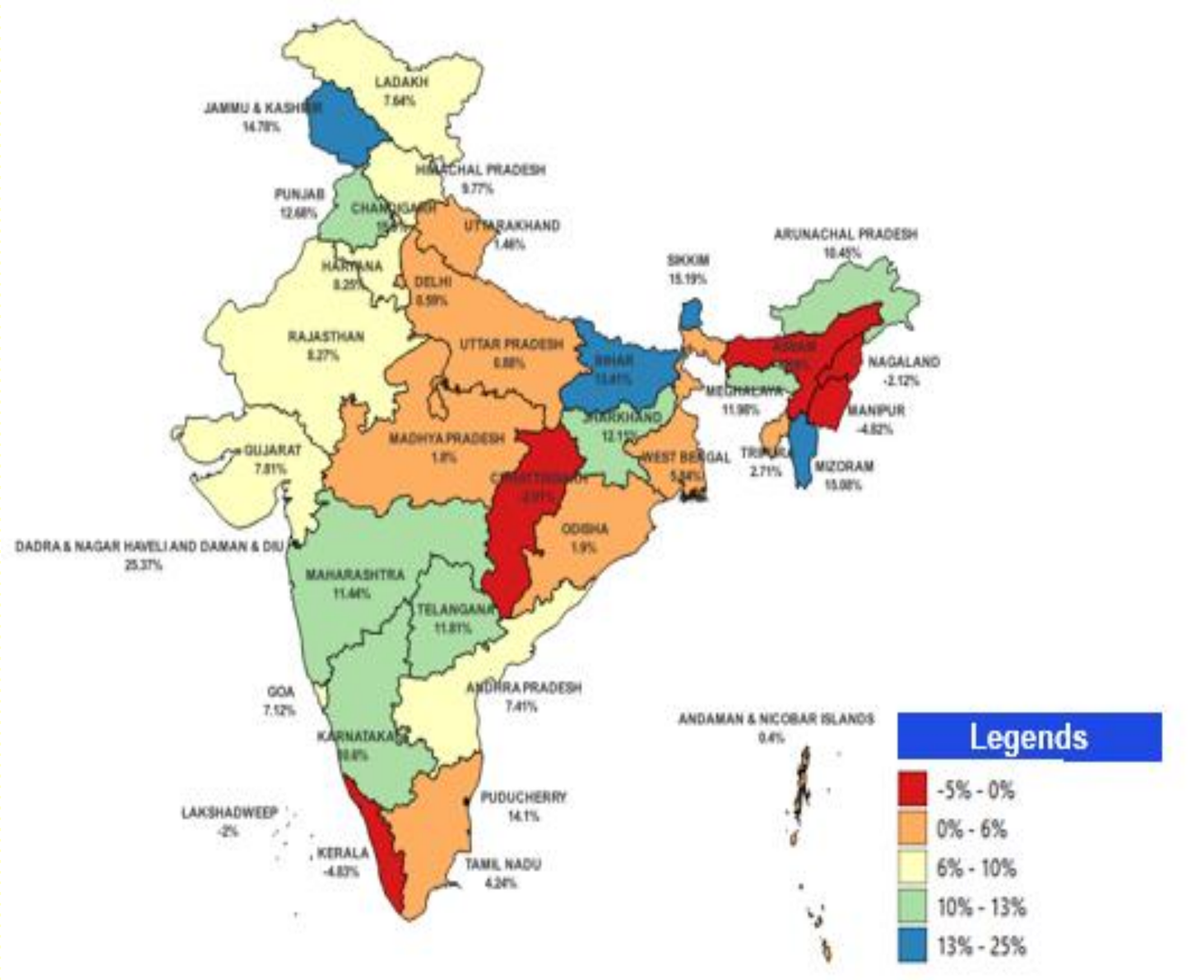


Figure-F: Month-wise HSD consumption (MMT) since April 2023

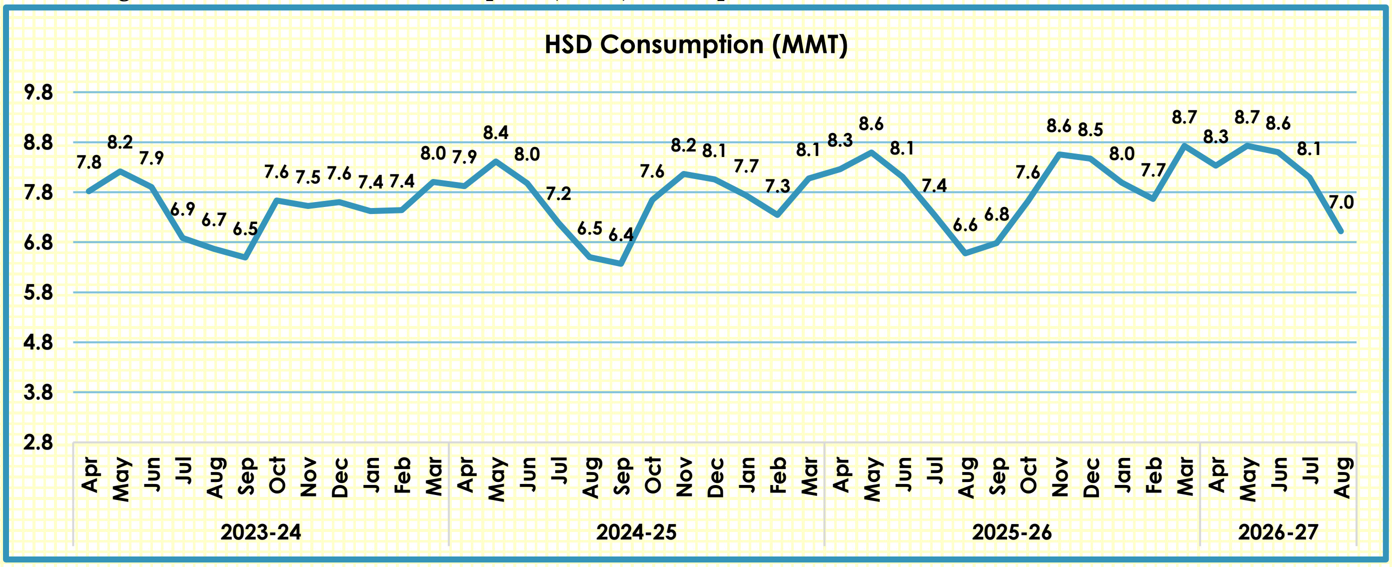
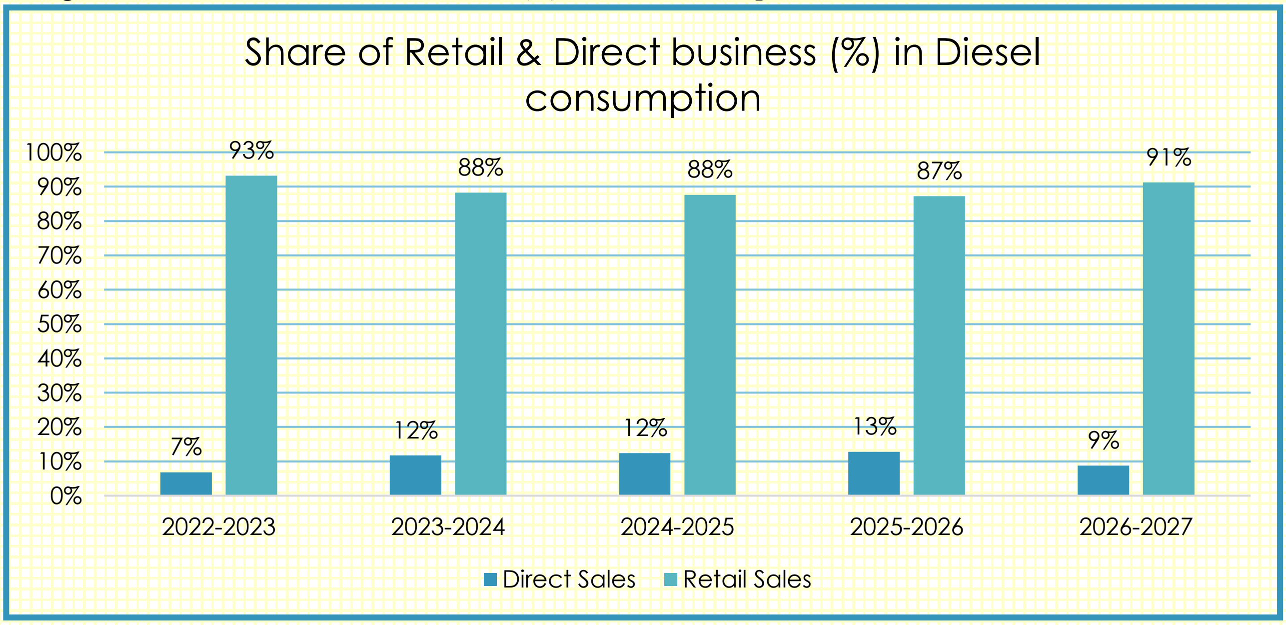


Figure-G: **Share of Retail & Direct business (%) in Diesel consumption**



Factors impacting consumption of HSD:

1. Monthly Rainfall Scenario (01 to 31 August, 2026): Rainfall over the country as a whole during August 2026 was 213.3 mm, which was 16% below the Long Period Average (LPA) of 254.9 mm, making it the 17th lowest August rainfall since 1901 and the 7th lowest since 2001. Daily variation of rainfall over the country as a whole during the month of August 2026 with normal based on data of 1971-2020 is presented in Fig. 1(a).

The All India rainfall percentage departure from normal for August during 1901-2026 is presented in Fig. 1(b). The time series of All-India rainfall from 1901 to 2026 is presented in Fig. 1(c). Rainfall during August 2026 over East and Northeast India was 276.0 mm, the 9th lowest since 1901 and the 6th lowest since 2001, as shown in Fig. 1(d).

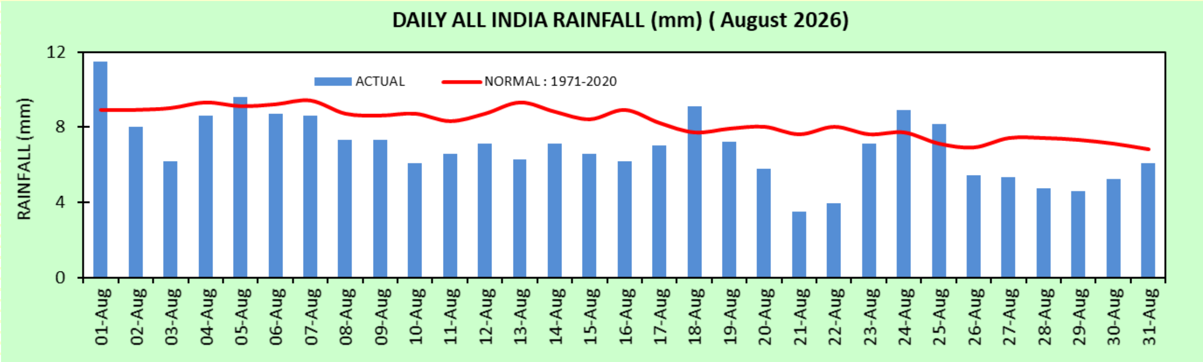


Fig.1 (a): Daily variation of rainfall over the country as a whole during August 2026.

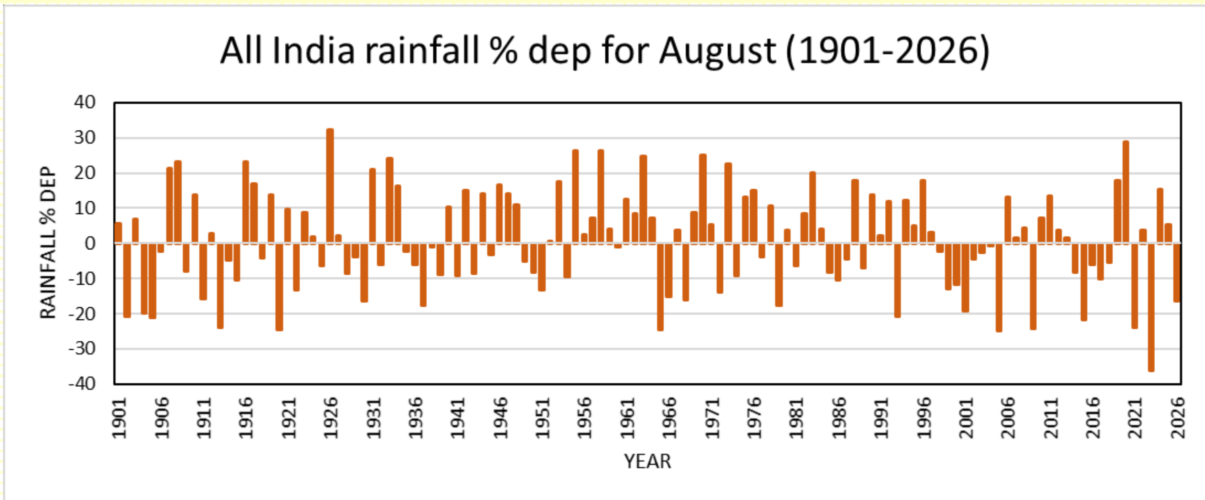


Fig. 1(b): All India monthly rainfall percentage departure from normal (1971-2020) for August from 1901-2026.

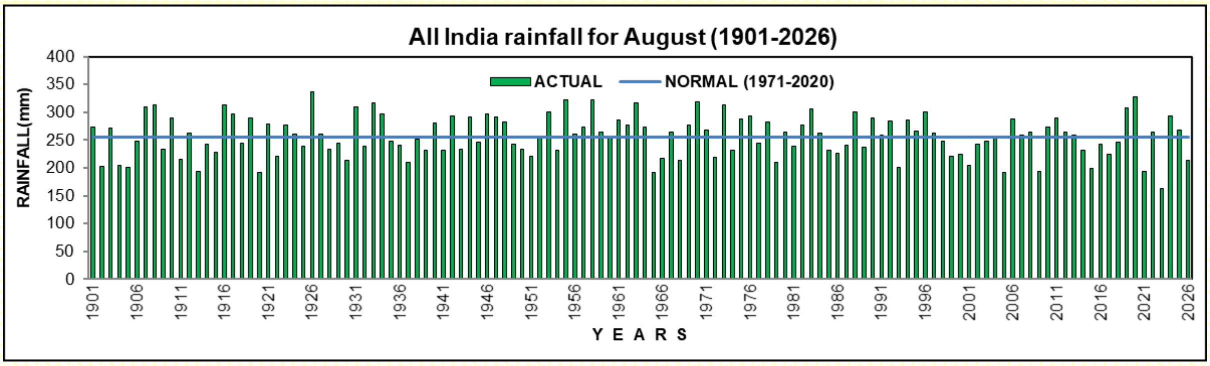


Fig. 1(c): Time series of area weighted rainfall over All India for August (1901 – 2026).

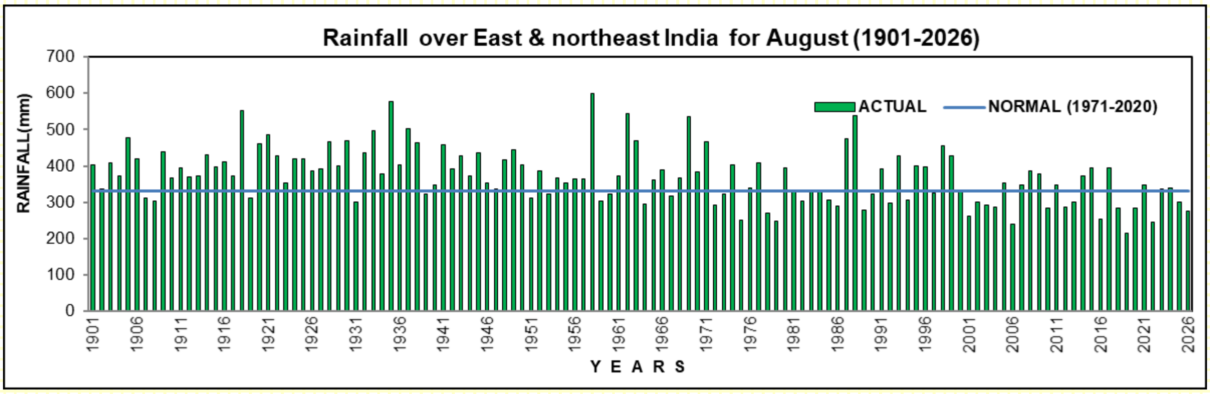


Fig. 1(d): Time series of area weighted rainfall over East & Northeast India for August (1901 – 2026).

During August 2026, 4 sub-divisions (Gangetic West Bengal, Jharkhand, East and West Uttar Pradesh) received Excess rainfall, while 12 sub-divisions received Normal rainfall, 18 sub-divisions received Deficient rainfall and 2 sub-divisions (Marathwada and Vidarbha) received Large Deficient rainfall (Figure H).

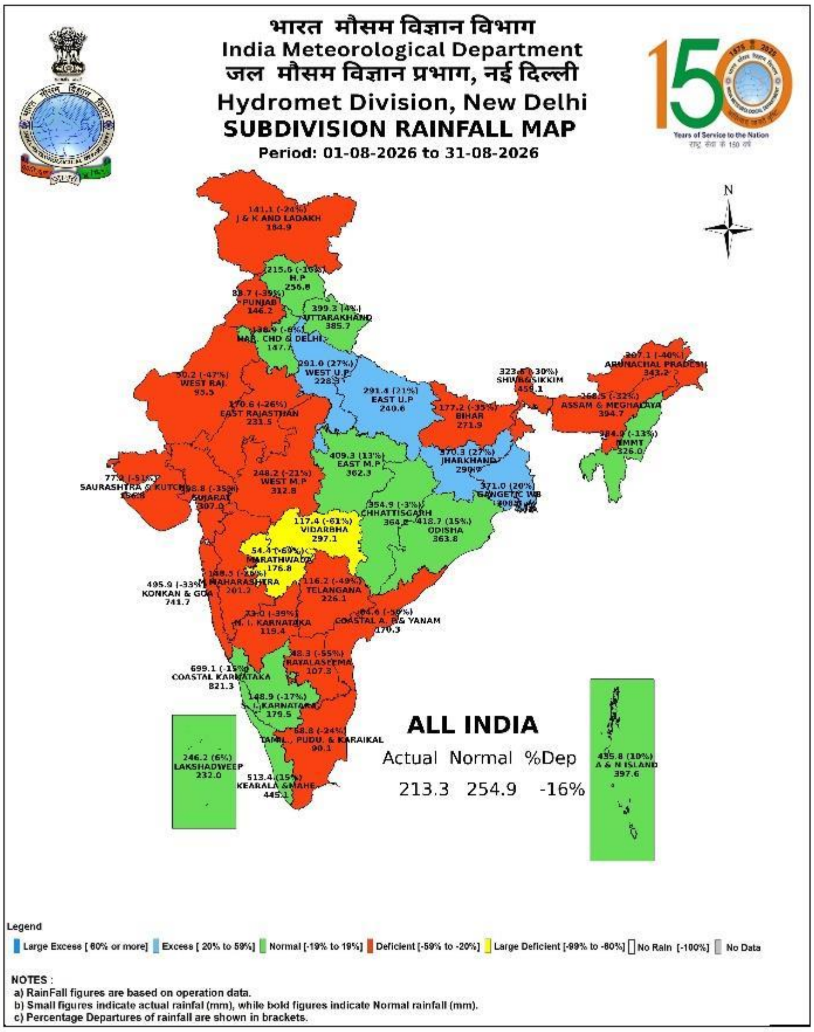


Figure- H: State wise Rainfall Map for August 2026. (Source: Indian Meteorological Department)

2. Frequency of Heavy Rainfall Events: The spatial distribution indicates that heavy rainfall events are widespread across most parts of the country. Very Heavy rainfall events are concentrated over central India, along west coast, north and northeast India. Extremely Heavy rainfall events are observed, primarily along the west coast and central India.

Out of total 2367 occasions, 1883 were Heavy rainfall (64.5 to 115.5 mm) categories, 422 were Very Heavy rainfall (115.6 to 204.4 mm) categories and 62 were Extremely Heavy rainfall (>204.4 mm) categories during August 2026.

3. Chief Synoptic Weather Features observed during August 2026 — 24 Hours Record Rainfall: There were some stations which received record rainfall (24 hours). The table below shows stations that received 24-hour record rainfall and their previous record.

STATION NAME	NEW RECORD (mm) (August 2026)	DATE	PREVIOUS RECORD (mm)	PREVIOUS RECORD DATE
HALDIA	242.6	13-08-2026	171.8	20-08-2013
MAZBAT	144.7	05-08-2026	136.2	25-08-1977

4. Characteristics of Temperatures for the month of August 2026: The average maximum, average minimum and mean temperature for the country as a whole during August 2026 were 31.65°C, 24.35°C and 28.00°C respectively, against the normal of 31.01°C, 23.68°C and 27.34°C based on data of 1991-2020. Thus, the average maximum, average minimum and mean temperature were above normal with departure from normal of 0.65°C, 0.67°C and 0.66°C respectively for the country as a whole. The daily variation of maximum and minimum temperature departure from normal over the country as a whole for August 2026 is shown in the Fig. 6(a) and (b), respectively.

Commercial Vehicle

Based on data from FADA Research, Indian domestic sales of commercial vehicles in Aug 2026 registered a growth of 14.5% as compared to Aug 2025 as shown in Table-4

Mechanization of Farm

Farm mechanisation has emerged as a key structural driver of HSD consumption, as increasing use of tractors and other agricultural machinery directly supports diesel demand.

Farm labour shortages, availability of higher agricultural credit, Custom Hiring Centre subsidies, tractor replacement cycles of 8–10 years and improved tractor affordability are the key drivers for mechanisation.

The structural demand for tractors and farm machinery provides a sustained base for HSD consumption. The strong tractor demand in FY26 has been further supported by **GST 2.0 benefits, higher agricultural lending (+17% YoY), stronger farm incomes and credit availability**, thereby contributing positively to diesel consumption growth.
Tractor retail sales remained robust during **Apr–Aug 2026, growing 18.5% YoY**, reflecting sustained strength in farm mechanisation demand. In **August 2026**, domestic tractor sales stood at **87,977 units**, registering a modest **0.8% YoY growth**. The moderation in August growth may be attributed to **monsoon-related stress** in certain regions, while **price increased by major tractor manufacturers** may also have suppressed retail demand during the month.

Period	Tractor Retail Growth (YoY)
Oct'25	**14.20%**
Nov'25	**56.55%**
Dec'25	**13.18%**
Jan'26	**22.89%**
Feb'26	**36.35%**
Mar'26	**27.87%**
Apr–Aug'26	**20.32%**

Growth was policy and liquidity driven. Growth was registered primarily due to three structural drivers as mentioned in table below:

Structural Driver	Significance	Scale / Evidence	Duration
GST Cut (Tax Policy)	Rate: 12% → 5% on tractors <1,800cc	Price drop Rs 41K–63K per unit	Ongoing (policy-dependent)
Rabi Cash Flows (Liquidity)	Govt wheat procurement 5-year high	35.76M tonnes, +19.4% YoY	One-cycle (may moderate)
Credit Expansion (Financing)	RBI cuts + NBFC/bank/captive arm growth	Bank agri lending +17% YoY	Structural but rate-sensitive

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

Commercial vehicles & tractors		August'26		
		2025	2026	Growth %age
CV	LCV	48,536	55,972	15.3%
	MCV	7,331	8,092	10.4%
	HCV	23,372	26,640	14.0%
	Others	67	65	-3.0%
Total CVs		79,306	90,769	14.5%
Tractors		87,244	87,977	0.8%

Source: FADA research

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

E-Way Bill

GSTN had proposed mandatory reporting of the "Ship-To" GSTIN in Bill-To/Ship-To e-Way Bill transactions from 1 August 2026 to improve consignment traceability. However, the implementation of this requirement was subsequently kept on hold on 30 July 2026. Accordingly, the mandatory Ship-To GSTIN requirement is not presently effective. Existing e-Way Bill provisions, including the general ₹50,000 consignment-value threshold subject to applicable GST rules, exemptions and State-specific provisions, continue to apply.

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

Month	Aug-26	Aug-25	Variance	Apr-Aug 26	Apr-Aug 25	Growth
Intra State	910.01	847.94	7%	4,531.40	4,073.79	11.2%
Inter State	480.87	443.41	8%	2,319.62	2,150.44	7.9%
Total	**1,390.88**	**1,291.35**	**8%**	**6,851.02**	**6,224.24**	**10.1%**

Source: GSTN Portal

Port Traffic:

The Major Ports achieved cargo throughput of 77.41 MMT during August 2026 which is 8.44% higher than the corresponding period last year.

Table-6: Cargo handled at major ports in Aug'2026 (Qty in TMT) Source: shipmin.gov.in

Ports	Aug'26	Aug'25	Growth (%)
Kolkata & Haldia	5,192	4,718	**10.03%**
Paradip	11,799	12,454	**-5.26%**
Visakhapatnam	6,918	7,069	**-2.14%**
Kamarajar (Ennore)	4,150	4,146	**0.11%**
Chennai	4,511	4,899	**-7.92%**
V.O. Chidambaranar	3,535	3,233	**9.36%**
Cochin	3,525	3,247	**8.55%**
New Mangalore	3,886	3,958	**-1.83%**
Mormugao	1,495	1,459	**2.48%**
Mumbai	6,533	5,673	**15.16%**
JNPA	9,744	8,562	**13.81%**
Deendayal	16,121	11,969	**34.69%**
Total:	**77,409**	**71,387**	**8.44%**

POWER SITUATION:

India's peak power demand surged to 270.83 GW during April–August 2026, compared with 242.77 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-Aug 2026)

Year	Energy				Peak			
	Requirement	Availability	Surplus(+)/Deficit (-)		Peak Demand	Peak Met	Surplus (+) / Deficits (-)	
	(MU)	(MU)	(MU)	(%)	(MW)	(MW)	(MW)	(%)
2021-22	465,585	464,092	-1,493	-0.3%	203,014	200,539	-2,475	-1.2%
2022-23	533,294	528,703	-4,591	-0.9%	215,888	207,231	-8,657	-4.0%
2023-24	548,398	547,281	-1,117	-0.2%	224,106	223,292	-814	-0.4%
2024-25	602,429	601,463	-966	-0.2%	249,856	249,854	-2	0.0%
2025-26	749,049	7,48,821	-228	-0.0%	242,773	242,493	-280	-0.1%
2026-27	8,19,996	8,18,999	-997	-0.1%	2,70,832	2,70,820	-12	0.0%

SECTORAL CONSUMPTION OF HSD:

During 'Apr-Aug'26, HSD total consumption with a volume of 40.77 MMT registered 4.8%growth Year-on Year basis over the volume of 38.89 MMT in 'Apr-Aug'25.

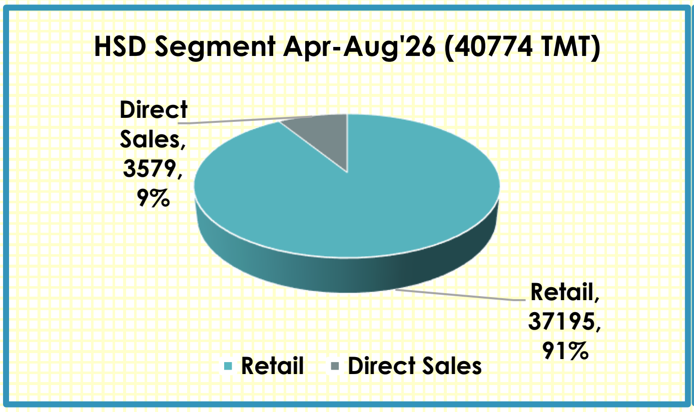
91% of HSD consumption during 'Apri-Aug 26', was constituted by retail sales. Balance 9% falls under direct sales category as shown in I(I/II) figure. The bifurcation was 88:12 in 'Apr-Aug-25'. The reduced share of direct sales is reflective of the price gap with the Retail.

High-Speed Diesel (HSD) consumption continued its momentum in 'Apr-Aug'26, registering a robust year-on-year growth of 4.8%. Infrastructure projects and road freight continued to support demand.

During **Apr–Aug'26**, HSD sales **shifted from Direct Sales to Retail Sales**. This shift of Direct Sales customers towards Retail Sales was primarily on account of **price differential.**

In direct sales category, the sectoral consumption break up is shown in I(II) figure. i.e., for Apr-Aug-26' 'Road Transport' was 27%, the highest share followed by Mining 16%, Manufacturing at 8%, Shipping 9%, Agriculture 2% and Power Generation 2%. Railways share increase from 10% 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 7% & 3% respectively.

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



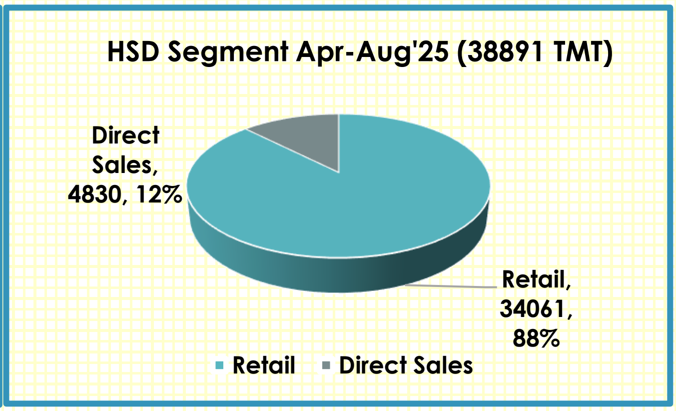
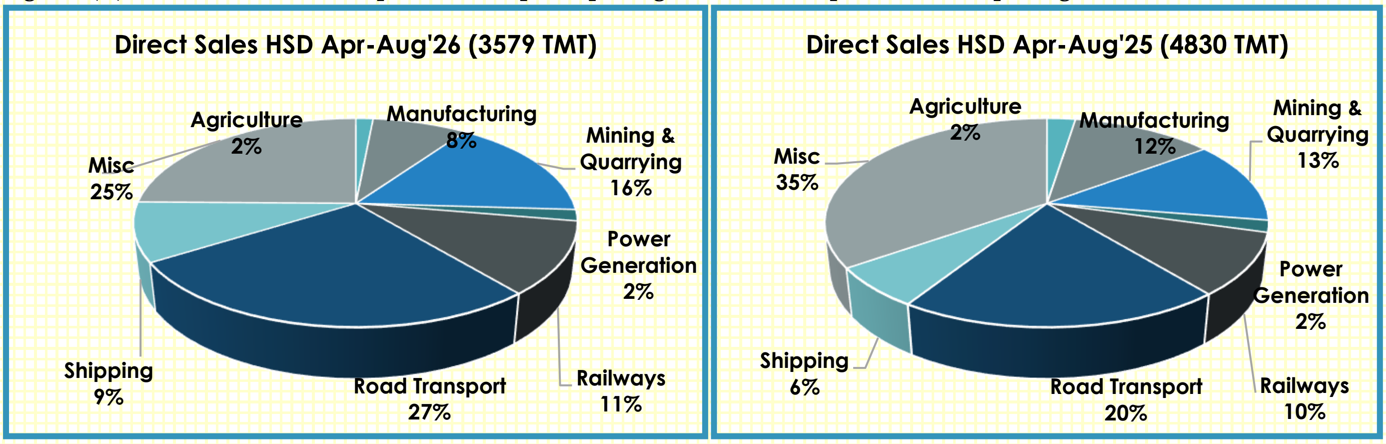


Figure-I(II): Sectoral HSD consumption Breakup in Apr-Aug'26 and its comparison with Apr-Aug'25



Share of Manufacturing has reduced from 12% to 8% owing to weaker demand from the Cement & Metal industry in the Direct Sales segment. Share of Mining sector increased from 13 to 16%. 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 40 TMT registered a growth of 17.2% in Aug 2026 as compared to Aug 2025 driven by PDS allocation. SKO consumption during the month is largely constituted by PDS category.

Total 15 states/UT i.e. Arunachal Pradesh, Assam, Bihar, Chhattisgarh, Jharkhand, Karnataka, Kerala, Maharashtra, Manipur, Meghalaya, Mizoram, Odisha, Tamil Nadu, Tripura and West Bengal have allocation in the month of Aug 2026.

The market share of subsidized-PDS and other SKO was 57% & 43% respectively for the month Aug 2026 as shown in the following figure-J.

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

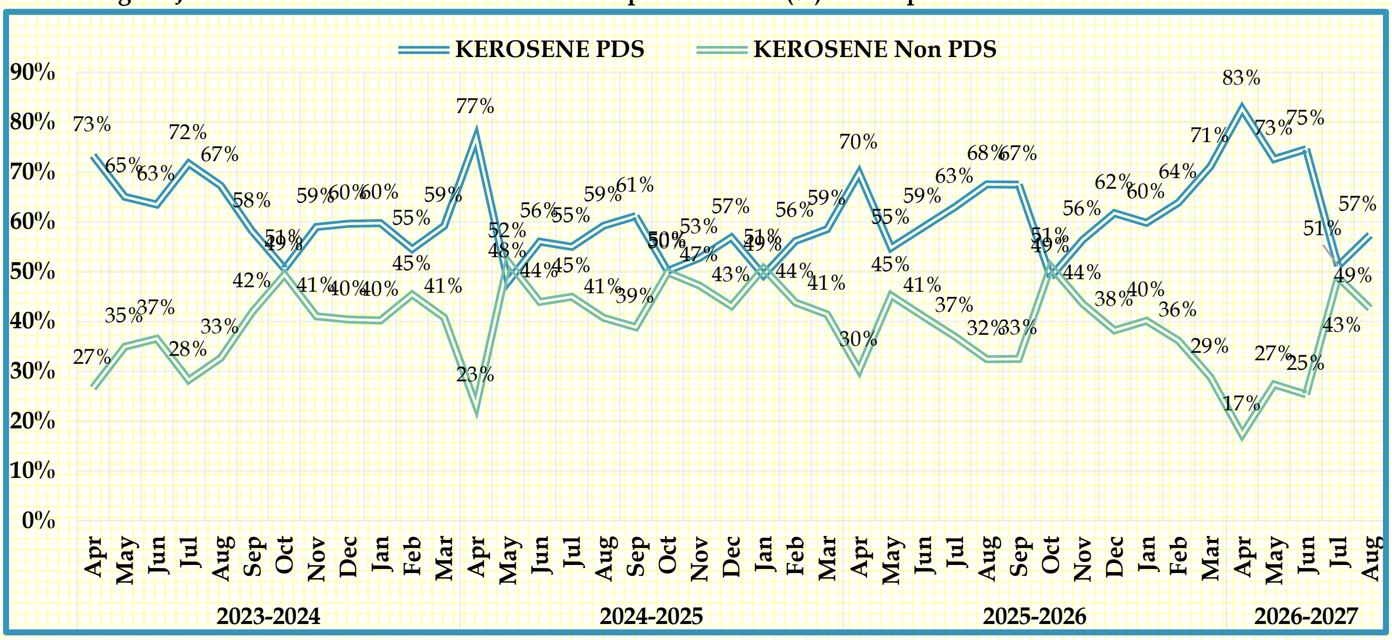
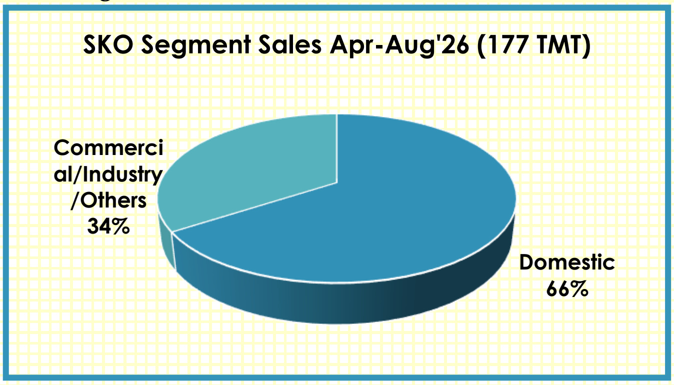
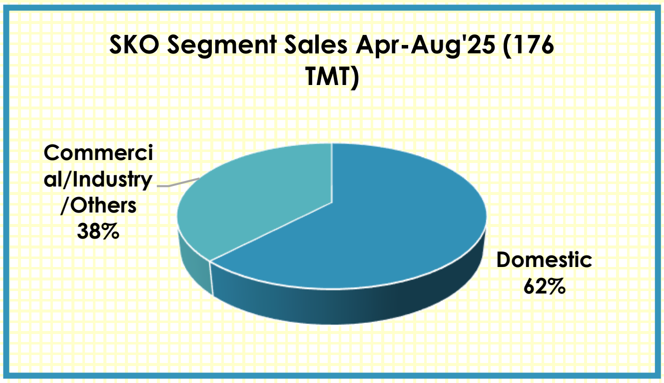


Figure-K: *Other SKO: non-subsidized PDS SKO +non-PDS kerosene

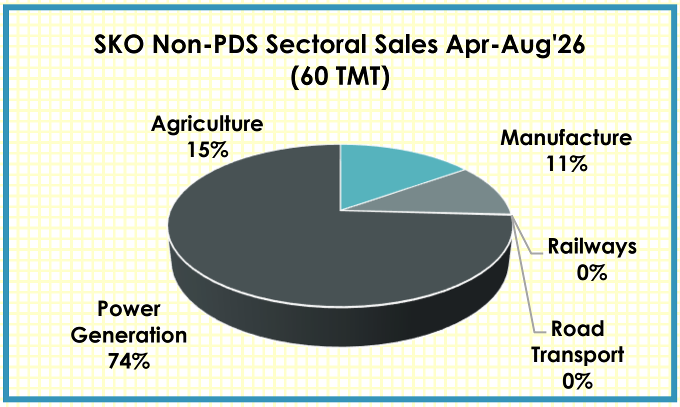


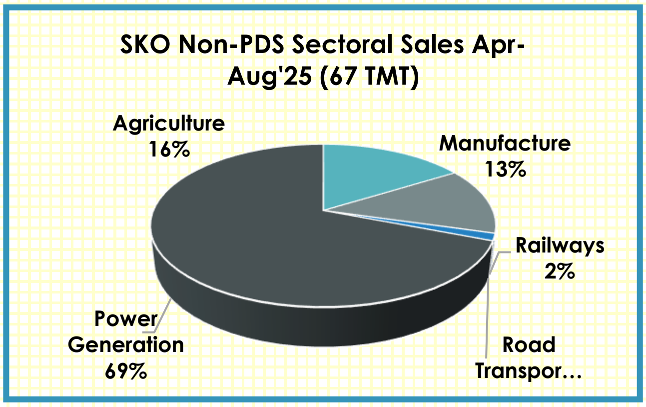


Sectoral consumption of SKO:

Out of total SKO sales during 'Apr-Aug'26 'PDS subsidized SKO' upliftment constituted 66%. So far as sales in 'Other SKO' is concerned,' agriculture accounted for 15% share, Manufacturing 11%, and Miscellaneous applications at 74%.

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





LUBES:

Lubes consumption with a volume of 416 TMT registered a robust growth of 11.6% in August 2026 as compared to August 2025. Consumption of lubricants increased during the month, primarily due to resumption of industrial offtake, as industries that had deferred procurement during April–August owing to operational closures and higher prices resumed purchases. Growth was further supported by increased demand from the automotive segment and additional domestic volumes following IOCL's supply of Group-III base oil, partly substituting volumes previously met through imports.

BITUMEN:

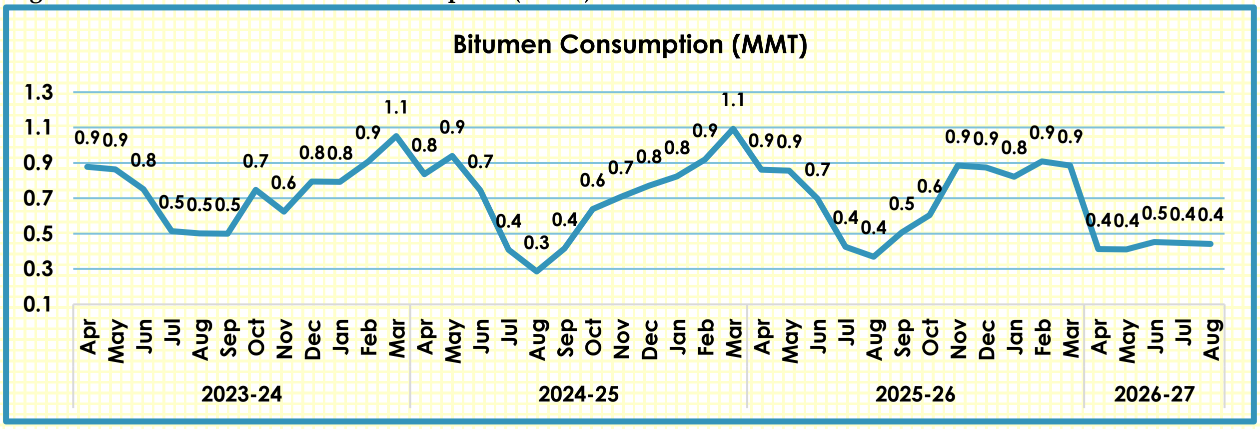
Bitumen consumption during Aug 2026 with a volume of 442 TMT registered a growth of 20.0% over the volume of 369 TMT in the month of Aug 2025.

Ongoing geopolitical tensions in the Middle East have severely fractured the bitumen supply chain, resulting in demand suppression driven by an unprecedented **60% price hike in imported bitumen**.

The impact of higher bitumen prices has varied across states and projects, depending on procurement arrangements and the availability of contractual price-escalation provisions. In some cases, relief has been provided through existing price-adjustment or escalation mechanisms under road construction contracts, including provisions applicable to projects executed under **MoRTH and NHAI**.

Bitumen consumption increased during August 2026, supported by improved road-construction activity and higher offtake and special incentive on VG10 to processors.

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



Sectoral consumption of Bitumen:

During 'Apr-Aug-26, total bitumen consumption with a volume of 2166 TMT registered a de-growth of 32.6% Year-on Year basis over the volume of 3213 TMT in 'Apr-Aug-25.

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

LPG:

LPG consumption during the month of August 2026 with a volume of 2.35 MMT registered de-growth in the month at 17.1% over the volume of 2.83 MMT in the month of August 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 17.1% on account of the geo-political situation and booking interval restrictions in domestic and also due to the restrictions on the commercial & industrial supply.

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

1. 15.9% de-growth in Packed domestic LPG consumption in Aug'26 as compared to Aug'25.
2. **De-Growth of 5.8% in non-domestic packed segment.**
3. Under PMUY scheme 10.57 crores beneficiaries at the end of August 2026.
4. As on 1.09.2026, total active domestic connections in India are 3277.50 lakhs

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

- **PMUY de-growth remained at 22.7%.**
- Growth of 28.7% in Auto LPG sales due lower base in the previous year and shift in demand from private to public sector companies due to supply restriction on account of middle east conflict.

5. 14.4Crs cylinders of 14.2kg (~46.4lacs/day) were delivered in Aug'26 compared to 17.1Crs in Aug'25.
6. De-Growth of 52.0% 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 resulting in moderated

offtake across segments

8. The de-growth in LPG consumption was also partly attributable to fuel substitution among some small commercial and industrial consumers, with users having compatible equipment shifting from LPG to HSD

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

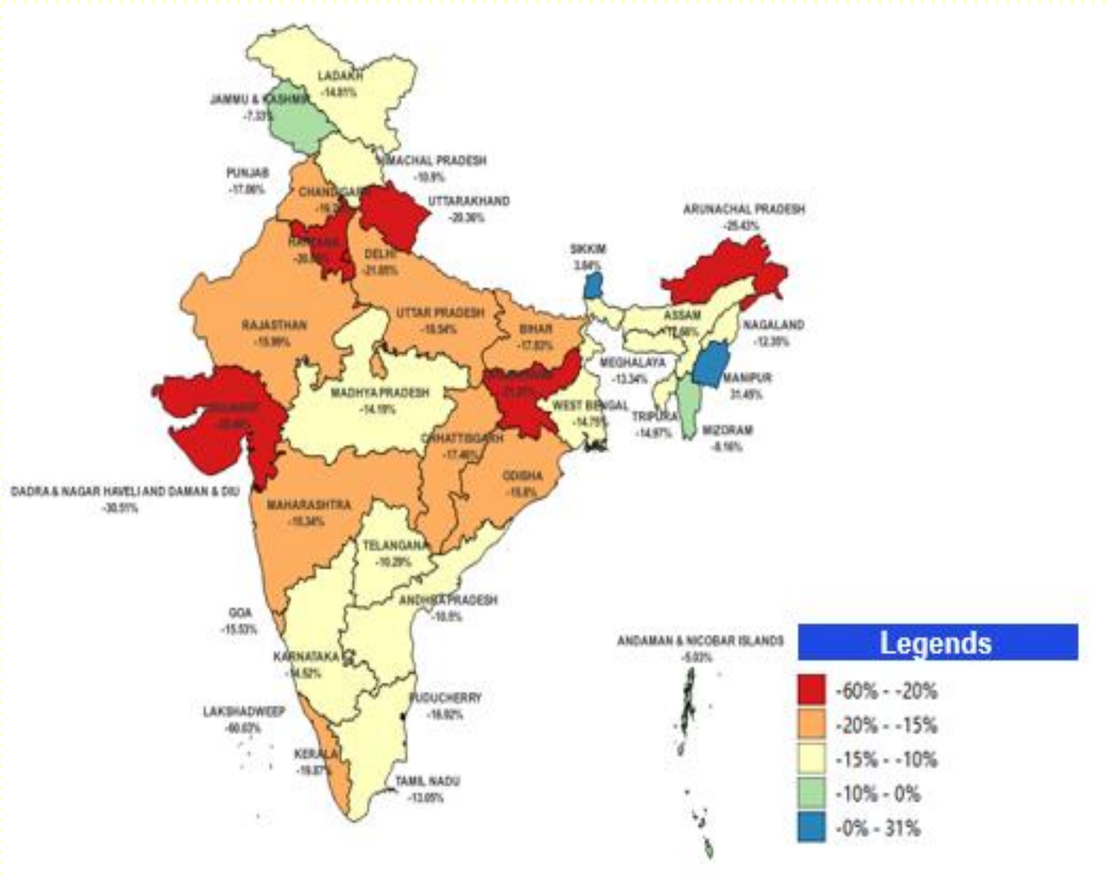
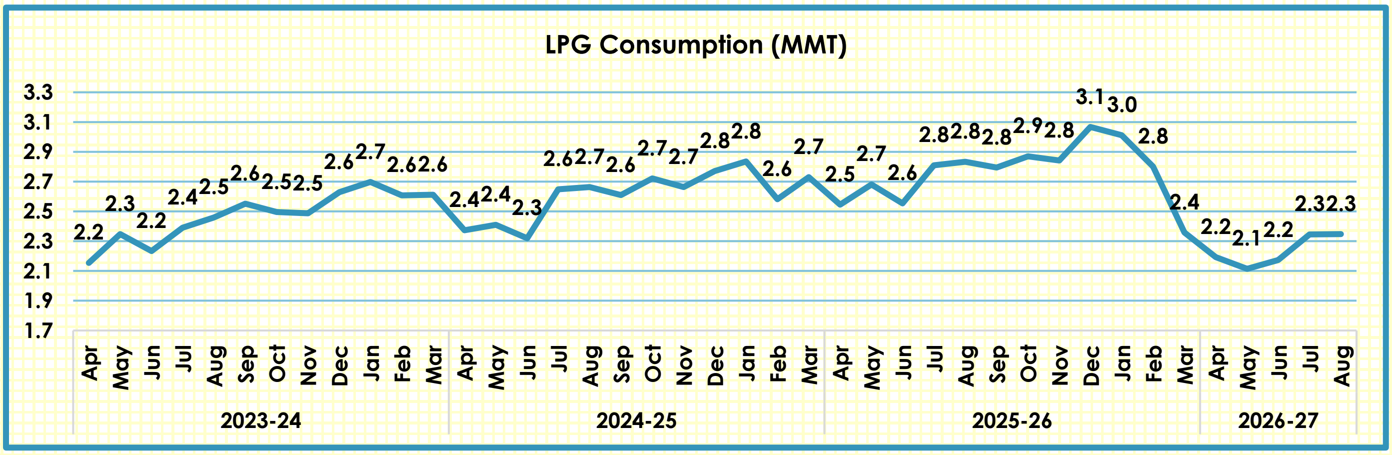


Figure-O: Month-wise LPG consumption (MMT)

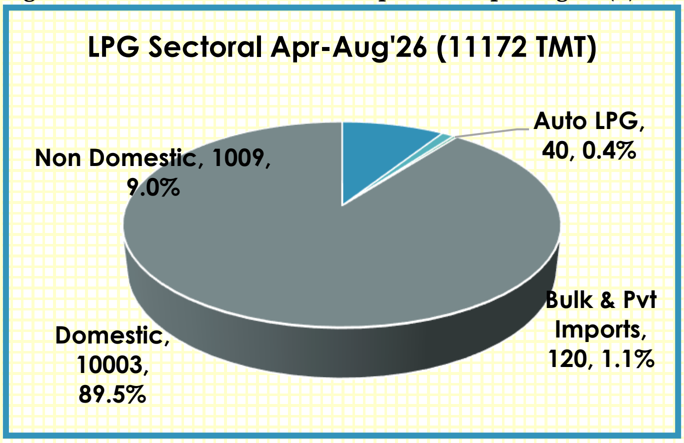


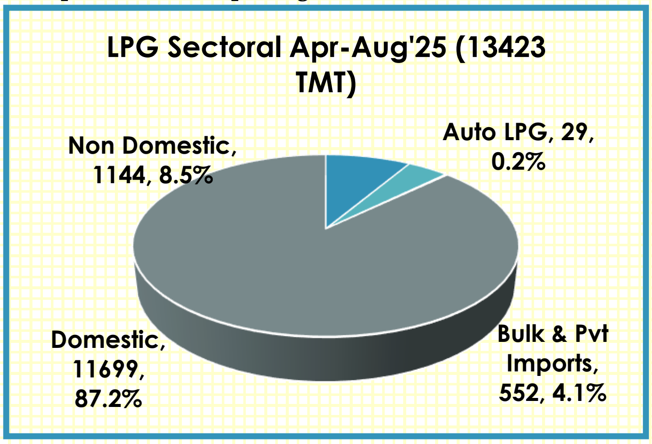
Sectoral consumption of LPG:

During 'Apr-Aug-26, total LPG domestic consumption with a volume of 11.18 MMT registered 16.8% de-growth Year-on Year basis over the volume of 13.42 MMT in 'Apr-Aug-25.

The Sectoral LPG consumption during 'Apr-Aug-26', was driven by Domestic packed at 89.5%, followed by LPG 'non-domestic/ industry/ commercial sector 9.0% & Bulk at 1.1%. Auto LPG at 0.4% has been on the negative trajectory getting displaced by CNG.

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





Naphtha:

Naphtha consumption during August 2026 with a volume of 828 TMT registered a de-growth of 22.3%, over a volume of 1065 TMT during the month of August 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.

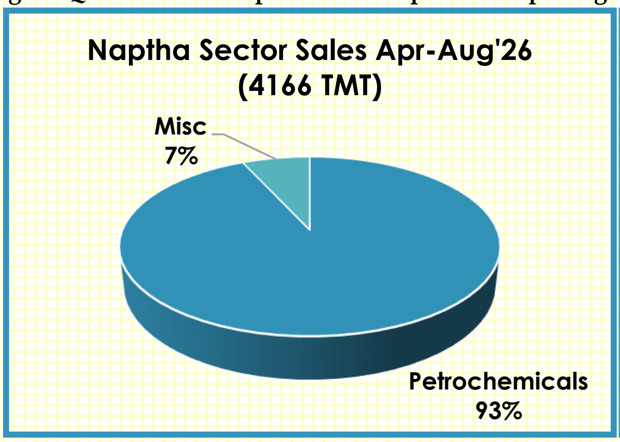
Higher natural gas prices led refineries to increase internal consumption of naphtha as an alternative feedstock, further reducing the availability of naphtha for external consumption and contributing to the overall decline in market demand.

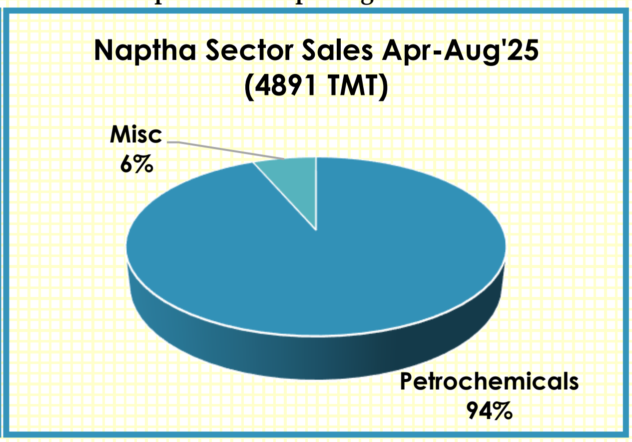
Major Petchem producers like HPL are operating below capacity with imported Naphtha.

Sectoral consumption of Naphtha:

During 'Apr-Aug-26, total Naphtha domestic consumption with a volume of 4166 TMT registered de-growth of 14.8% Year-on Year basis over the volume of 4891 TMT in 'Apr-Aug-25.
93% Consumption of naphtha during this period was driven by petrochemicals sector.

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





ATF:

Aviation Turbine Fuel (ATF) consumption reached 726 TMT and registered a year-on-year Increase of 2.1 % in August 2026.

The subdued performance was primarily attributable to elevated ATF prices, which continued to increase airline operating costs, coupled with international flight cancellations and selective route rationalisation, particularly on regional and secondary routes.

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 competitor 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.

The reduction in VAT on ATF by States like Delhi and Maharashtra, have supported higher ATF offtake at major aviation hubs by reducing the effective cost of ATF.

ATF consumption attributable to **Noida International Airport (Jewar Airport)** is yet to pick up significantly, as flight operations and passenger traffic are still in the initial ramp-up phase

North Eastern region recorded maximum degrowth in ATF volumes in July 26. Domestic Aircraft movement recorded de-growth of 7.0% in the month of July 2026 as per AAI data mentioned below in Table 8A.

Hyderabad's ATF recorded a 13.9% reduction in aircraft movements, not merely an OMC sales variation. The decline was driven by airline capacity rationalisation amid high ATF and operating costs, together with West Asia disruptions that caused cancellations and rescheduling on key Gulf routes. While airport-specific airline cuts are unavailable, Hyderabad was affected more severely than the national average, with long-haul international cancellations having a disproportionate impact on ATF demand.

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

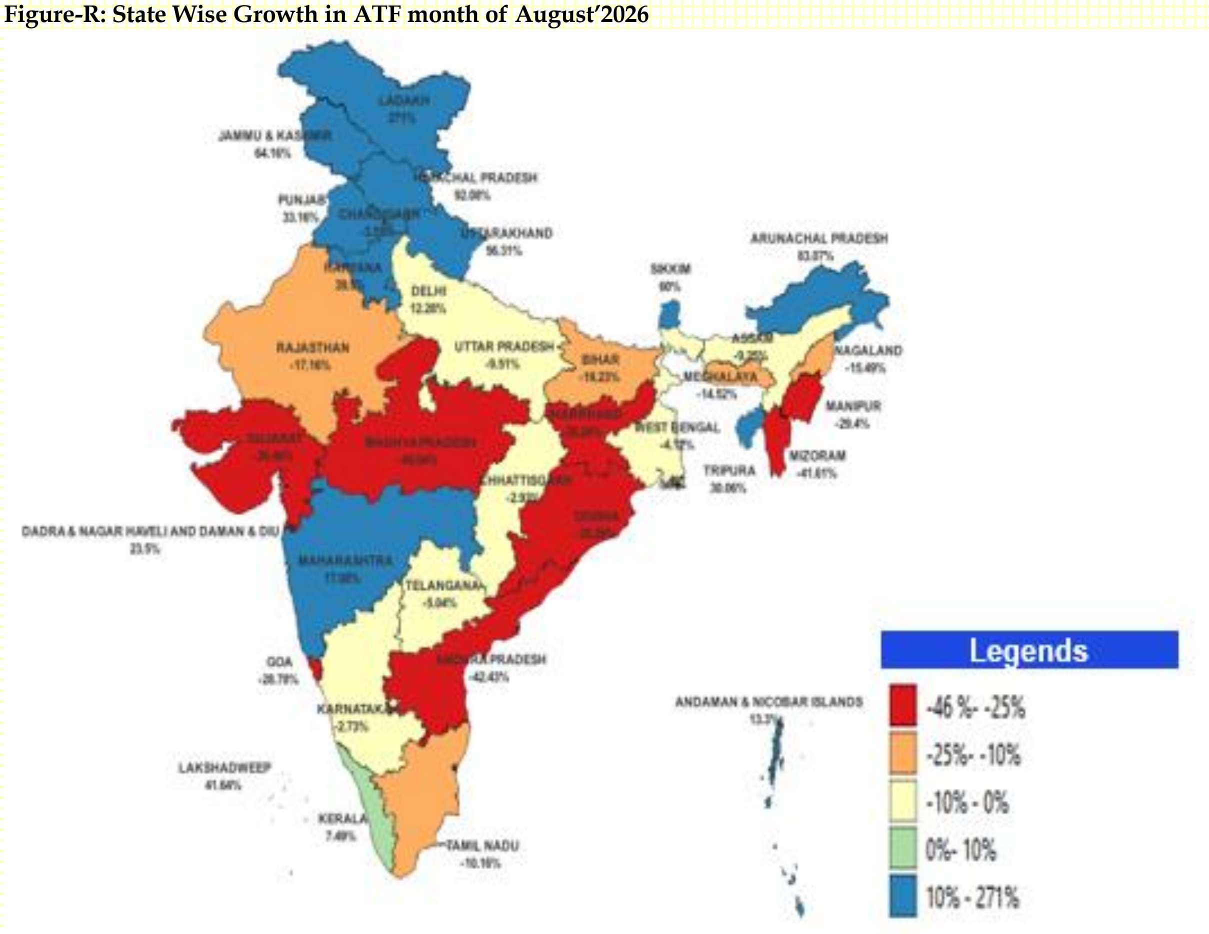
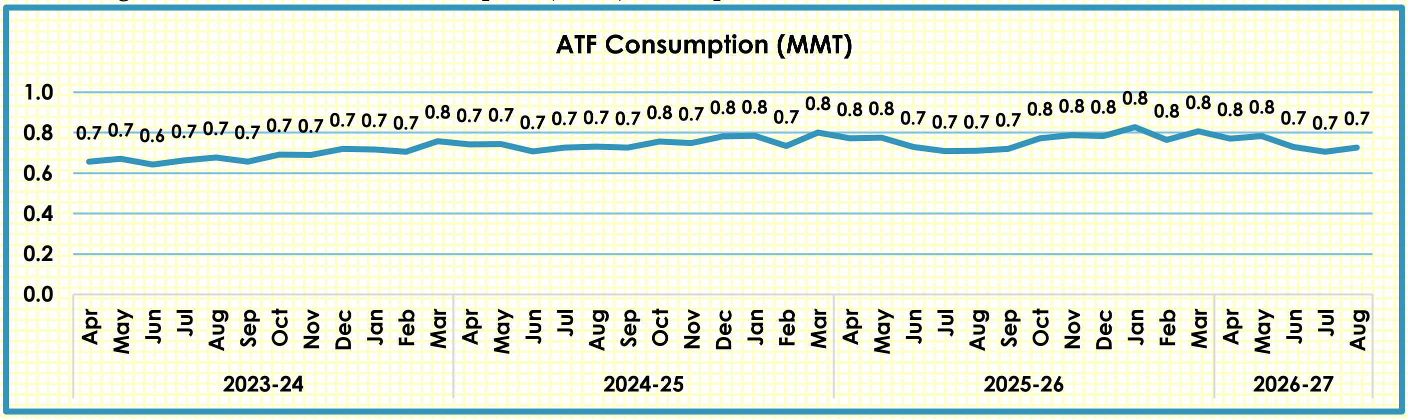


Figure-S: Month-wise ATF consumption (MMT) since Apr 2023

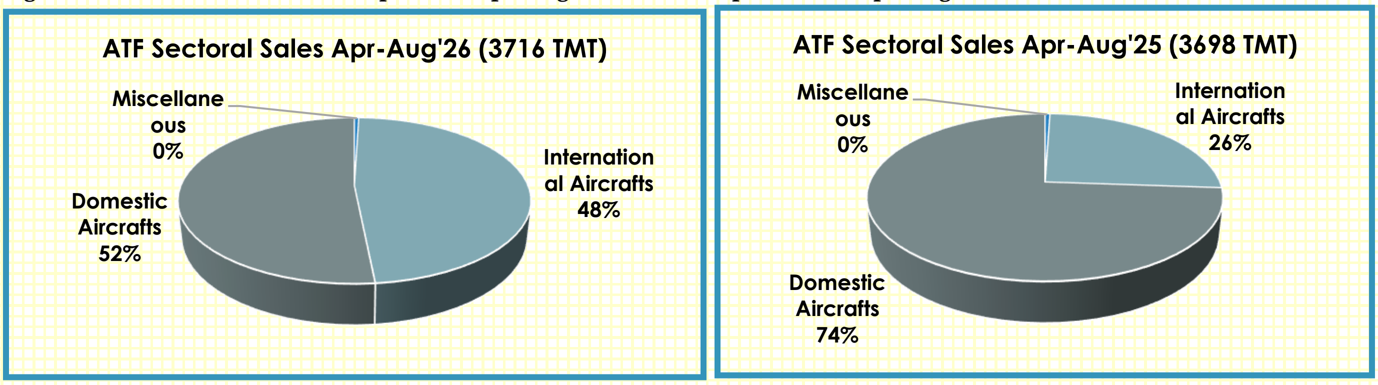


Sectoral consumption of ATF:

During 'Apr-Aug'26, total ATF domestic consumption with a volume of 3716 TMT registered 0.5% growth Year-on Year basis over the volume of 3698 TMT in 'Apr-Aug-25.

Almost entire ATF consumption during 'Apr-Aug-26 was attributed to aviation; 52% domestic aviation & 48% international aviation. Details comparisons and YoY analysis are pictorially presented in the following figures, as per the details furnished by OMC

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



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

- During the month of July 2026, all operational airports (taken together) handled 213.26 thousand aircraft movements (excluding General Aviation Movements), 30.63 million passengers and 372.26 thousand tonnes of freight.
- Aircraft movements, domestic aircraft movements and total aircraft movements have decreased by 9.2%, 1.6 and 2.8 % respectively during (April- July) 2026-27 as compared to (April- July) 2025-26..
- Total passengers have decreased by 8.6%, 1.6% respectively and domestic passengers have increased by 0.1% during (April- July) 2026-27 as compared to (April- July) 2025-26.
- Domestic freight and total freight traffic have increased by 14.1%, 7.8% and 11.7 % respectively during the period (April- July) 2026-27 as compared to (April- July) 2025-26.

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

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

CATEGORY	July		%
	2026-27	2025-26	CHANGE
Aircraft Movements (in '000)			
International	38.48	40.71	-5.5
Domestic	174.78	188.01	-7.0
Total	213.26	228.72	-6.8
General Aviation	20.77	19.02	9.2
Grand Total(INTL+DOM+Gen)	**234.03**	**247.74**	**-5.5**

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								
July								
REGION	July		Change	REGION	July		Change	Difference
	2026-2027	2025-2026			2026-2027	2025-2026		
DOMESTIC AIRCRAFT MOVEMENTS (IN NOS)				ATF CONSUMPTION (IN TMT)				
EASTERN	19554	22957	-14.8%	EASTERN	42	47	-11.7%	-3.1%
NORTH EAST	6971	7506	-7.1%	NORTH EAST	11	14	-22.4%	15.3%
NORTHERN	47631	47751	-0.3%	NORTHERN	262	249	5.4%	-5.6%
SOUTHERN	51635	60111	-14.1%	SOUTHERN	216	225	-4.0%	-10.1%
WESTERN	48985	49687	-1.4%	WESTERN	174	174	0.1%	-1.5%
Total	174776	188012	**-7.0%**	**Total**	**705**	**710**	-0.6%	-6.4%

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 sulphur heavy stock (FO/LSHS):

FO/LSHS consumption during Aug-2026 with a volume of 525 TMT with a growth of 4.9 % over the volume of 501 TMT in Aug-2025.

Some 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 owing to escalated geo political tensions in middle east. Ports like **Kandla, Mumbai and Kochi** have experienced a significant demand surge, leading to a notable growth in the consumption.

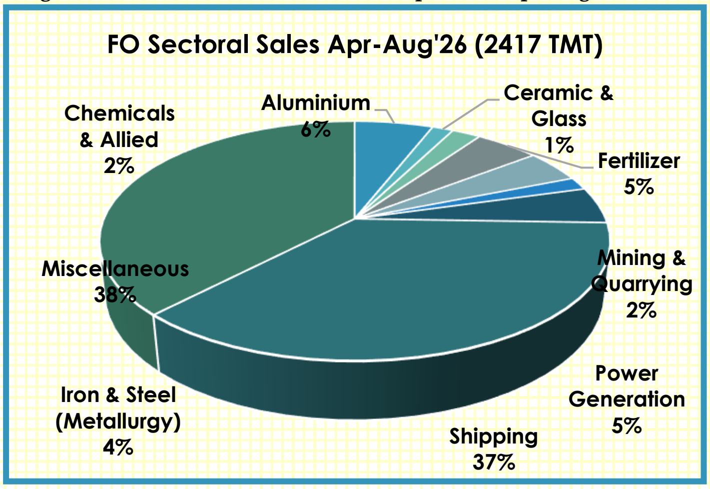
Sectoral consumption of FO/LSHS:

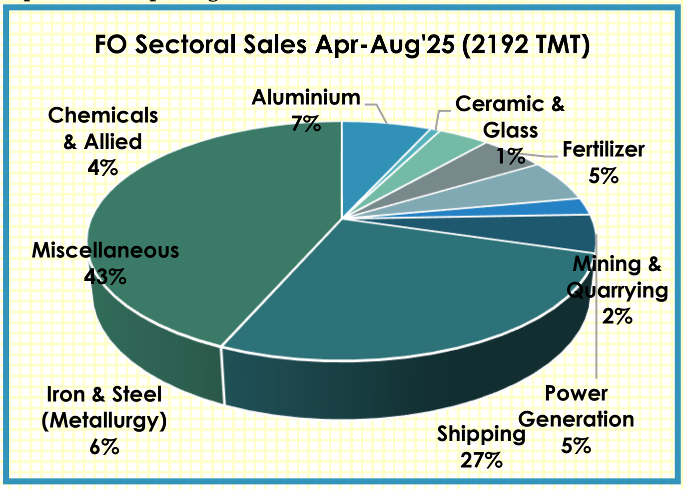
During 'Apr-Aug-26, total FO/LSHS consumption with a volume of 2733 TMT with a growth of 9.9% Year-on Year basis over the volume of 2484 TMT in 'Apr-Aug-25.

Further Product wise consumption for FO Apr-Aug'26 was 2417 TMT vs 2192 TMT in Apr-Aug'25 (10.3% growth). For LSHS, Apr-Aug'26 was 316 TMT vs 292 TMT in Apr-Aug'25 (8.2% Growth).

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

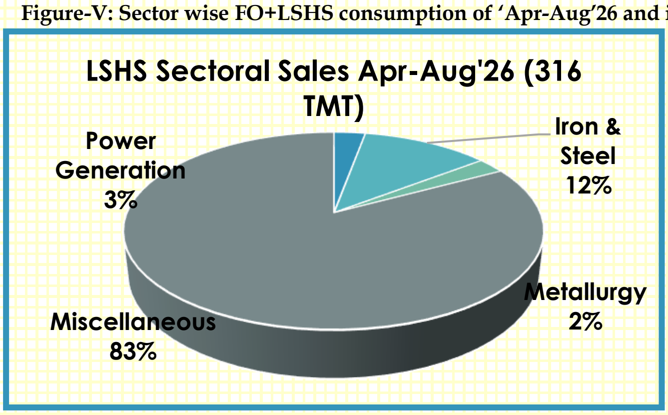
Figure-U: Sector wise FO+LSHS consumption of 'Apr-Aug'26 and its comparison to 'Apr-Aug'25

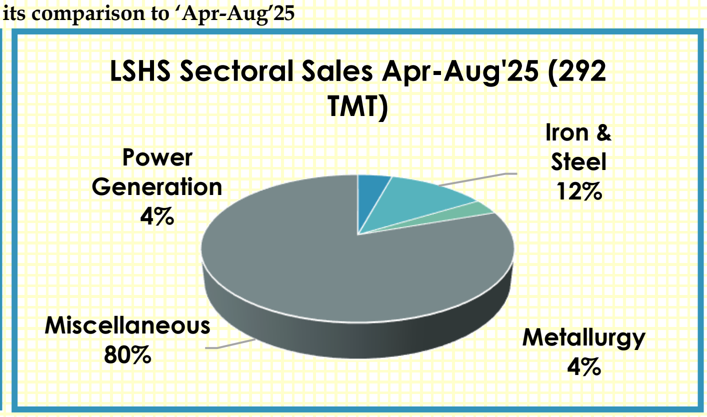




Apr-Aug'26:-	Apr-Aug'25:-
Shipping sector has a share of 37%, up from 27% from previous period followed by Iron & steel, fertilizer and Aluminium.	Shipping contributes the highest share with 27% followed by Iron & Steel Aluminium, Glass, Fertlizer & Power generation.

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





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

Petcoke:

Petcoke consumption during the month of August 2026 with a volume of 1.59 MMT and de-growth of 28.6% over the volume of 2.23 MMT in the same period last year.

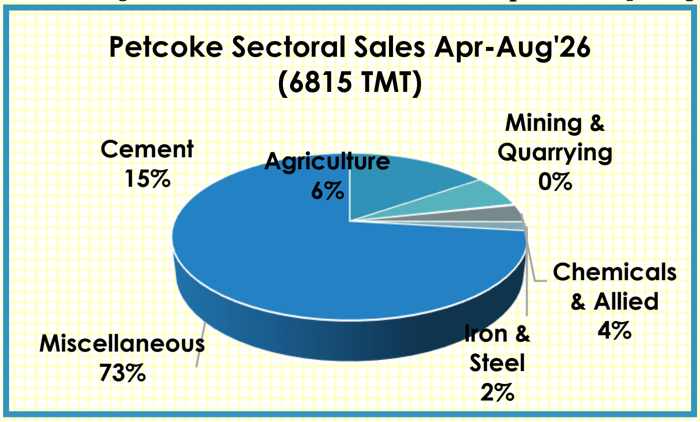
The Directorate General of Foreign Trade (DGFT) maintained **strict quantitative limits and allocation procedures for petroleum coke imports during FY 2026-27**. Imports of **Raw Petroleum Coke (RPC) for CPC manufacturing** and **Calcined Petroleum Coke (CPC) for the aluminium industry** remained subject to prescribed import restrictions, environmental compliance requirements and allocation based on eligible processing capacity and past utilisation. These regulatory controls limited the availability of imported RPC and CPC, thereby constraining the potential growth in petcoke consumption.

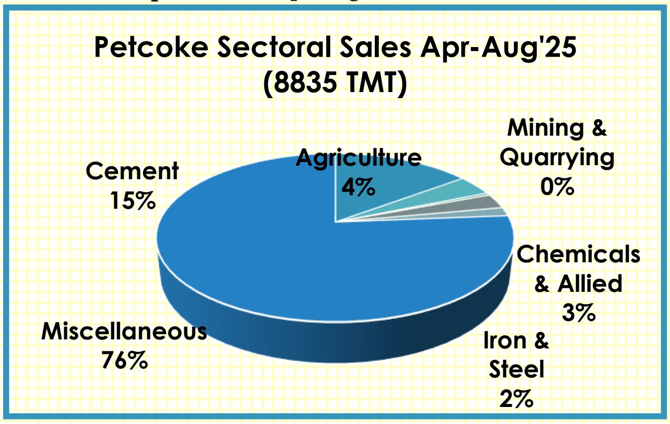
Other factor that can be attributed to Petcoke consumption trend: Petcoke consumption faced a significant decline by private importers as international prices remained firm. This led the cement sector to shift toward more cost-effective alternative fuels, especially domestic thermal coal.

Sectoral consumption of Petcoke:

During 'Apr-Aug-26', total Petcoke cumulative domestic consumption with a volume of 6.82 MMT registered 22.9% de-growth Year-on Year basis over the volume of 8.84 MMT in 'Apr-Aug-25'. The cement sector continues to occupy the largest share in 'Apr-Aug'26' (P) at 15%, followed by other Industries.

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





Apr-Aug'26:- Cement industry occupied the highest share at 15%	**Apr-Aug'25:-** Cement industry occupied the highest share at 15% followed by other sectors.

Light Diesel Oil

LDO consumption during the month Aug-2026 with a volume of 47 TMT registered a 41.8% de-growth over the volume of 80 TMT in Aug-2025.

August 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.

The significant price differential between LDO and HSD emerged as one of the major factors contributing to the de-growth in LDO consumption.

With LDO prices approximately ₹24-28/litre higher than HSD, price-sensitive consumers with compatible equipment have shifted from LDO to HSD as a more economical alternative, resulting in substitution of LDO demand.

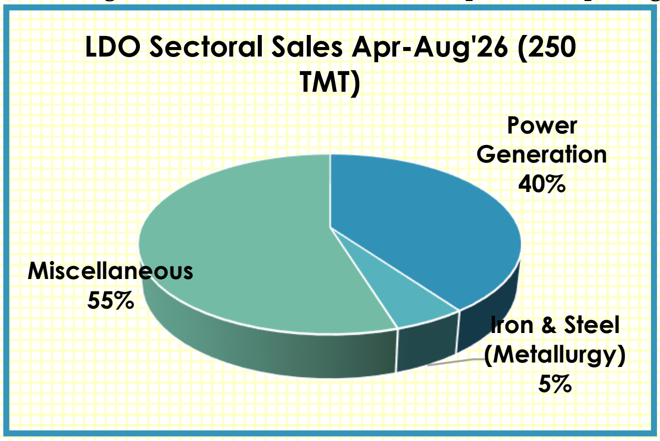
Transition of steel and other industrial users towards electricity-based operations and more energy-efficient production processes have also led to de-growth in LDO consumption.

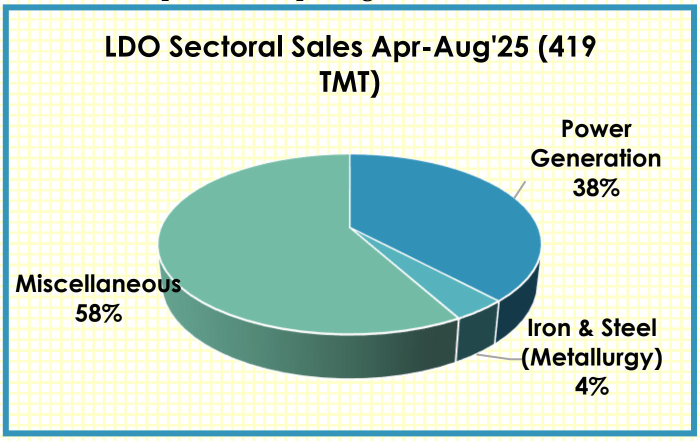
Sectoral consumption of Light Diesel Oil:

During 'Apr-Aug-26, total LDO domestic consumption with a volume of 250 TMT registered a 40.3% de-growth Year-on Year basis over the volume of 419 TMT in 'Apr-Aug-25.

The cumulative consumption of Light Diesel oil (LDO) during 'Apr-Aug'26' was driven by 'Power Generation' 40% followed by Iron & Steel at 5%.

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





Apr-Aug-26:-Power Generation occupied a 40% share of the product followed by Iron & Steel & Misc industries	**Apr-Aug-25**:-Power Generation occupied a 38% 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.

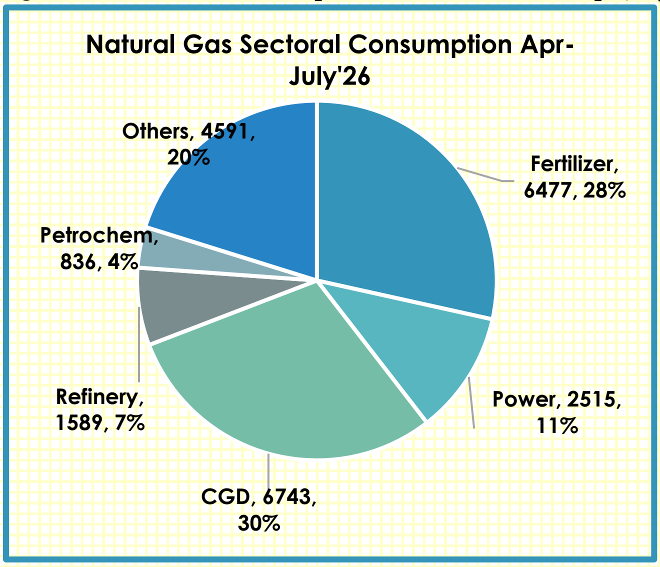
For the monthly consumption data, please refer to the NG report published by PPAC.

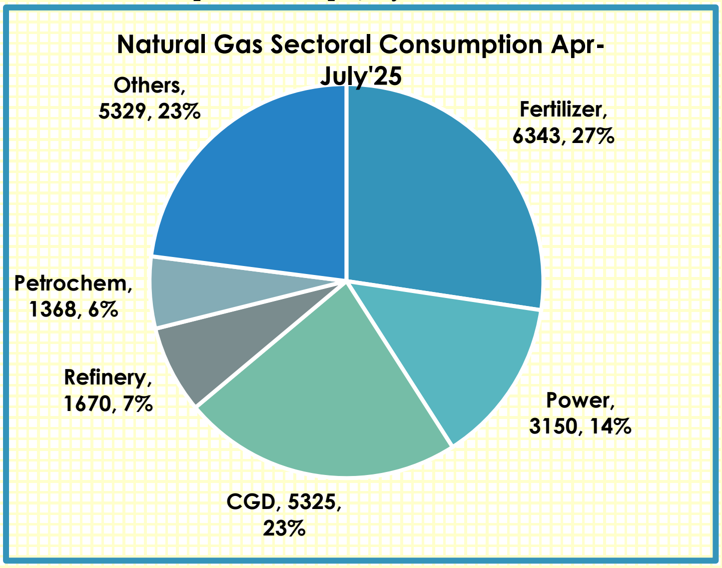
'Total Natural Gas Consumption (including internal consumption) for the month of Aug 2026 (P) was 5708 MMSCM which was 2.39% lower than the corresponding month of the previous year.

Sectoral consumption of Natural Gas consumption of Apr-July'26'& its comparison to 'Apr-July'25 (P): During Apr-July'26, total Natural Gas monthly domestic consumption with a volume of 22,751 MMSCM, over the volume of 23,185 MMSCM during the same period in the preceding year .During Apr-July'26, consumption of Natural gas (NG) was driven by CGD (30%), followed by fertilizer (28%) Power (11%) Refinery (7%), Petrochemicals (4%). Misc sectors occupied a share of 20.2% in Apr-July'2026.

As per IGX, Indian Natural Gas average spot purchase price for the month of Aug 2026 was 22.0 $/MMBtu.

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





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

P: provisional

Apr-July'2026 CGD sector occupied the highest share for the Consumption of Natural Gas at 30% followed by Fertilizer and Power at 28% and 11% respectively.	***Apr-July'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-Aug			August									
	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	13423	11172	-16.8	2388	2460	2664	2833	2347	-1.7	-4.6	-11.9	-17.1
SKO	176	177	0.4	32	52	35	34	40	27.3	-22.8	16.1	17.2
Sub Total	**13599**	**11349**	**-16.5**	**2420**	**2512**	**2698**	**2867**	**2388**	**-1.3**	**-5.0**	**-11.5**	**-16.7**
(B) Major Decontrolled Product													
HSD	38891	40774	4.8	6343	6670	6501	6577	7023	10.7	5.3	8.0	6.8
MS	17791	19029	7.0	3006	3093	3360	3544	3836	27.6	24.0	14.2	8.2
Naphtha	4891	4166	-14.8	1089	1206	1156	1065	828	-23.9	-31.4	-28.4	-22.3
ATF	3698	3716	0.5	596	677	732	710	726	21.8	7.2	-0.8	2.1
Bitumen	3213	2166	-32.6	316	501	286	369	442	39.9	-11.6	54.7	20.0
FO & LSHS	2486	2733	9.9	617	509	498	501	525	-14.9	3.1	5.4	4.9
Lubricants & Greases	1921	1820	-5.2	243	326	341	373	416	71.2	27.5	21.8	11.6
LDO	419	250	-40.3	66	75	80	80	47	-29.5	-38.1	-41.5	-41.8
Sub Total	**73310**	**74654**	**1.8**	**12275**	**13058**	**12954**	**13219**	**13843**	**12.8**	**6.0**	**6.9**	**4.7**
Sub - Total (A) + (B)	**86909**	**86003**	**-1.0**	**14695**	**15570**	**15652**	**16087**	**16230**	**10.5**	**4.2**	**3.7**	**0.9**
(C) Other Minor Decontrolled Products													
Petroleum coke	8835	6815	-22.9	1230	1759	1725	2239	1599	30.0	-9.1	-7.3	-28.6
Others	4329	3342	-22.8	1516	1516	884	818	777	-48.8	-48.8	-12.1	-5.0
Sub Total	**13164**	**10157**	**-22.8**	**2747**	**3275**	**2609**	**3056**	**2376**	-13.5	-27.5	-8.9	-22.3
Total	**100073**	**96160**	**-3.9**	**17442**	**18845**	**18261**	**19143**	**18606**	**6.7**	**-1.3**	**1.9**	**-2.8**

*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-Aug			August								
	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	1.02	0.85	-16.8%	0.89	0.92	1.00	1.06	0.88	-1.7%	-4.6%	-11.9%	-17.1%
SKO	0.01	0.0093	0.4%	0.01	0.01	0.01	0.01	0.01	27.3%	-22.8%	16.1%	17.2%
Sub Total	**1.0**	**0.9**	**-16.6%**	**0.9**	**0.9**	**1.0**	**1.1**	**0.9**	**-1.4%**	**-4.9%**	**-11.6%**	**-16.9%**
(B) Major Decontrolled Product												
HSD	1.93	2.03	4.8%	1.56	1.64	1.60	1.61	1.72	10.7%	5.3%	8.0%	6.8%
MS	1.03	1.10	7.0%	0.86	0.89	0.96	1.02	1.10	27.6%	24.0%	14.2%	8.2%
Naphtha	0.28	0.24	-14.8%	0.31	0.34	0.32	0.30	0.23	-23.9%	-31.4%	-28.4%	-22.3%
ATF	0.20	0.20	0.5%	0.16	0.18	0.19	0.19	0.19	21.8%	7.2%	-0.8%	2.1%
Bitumen	0.13	0.09	-32.6%	0.06	0.10	0.06	0.07	0.09	39.9%	-11.6%	54.7%	20.0%
FO & LSHS	0.11	0.12	9.9%	0.13	0.11	0.11	0.11	0.11	-14.9%	3.1%	5.4%	4.9%
Lubricants & Greases	0.09	0.09	-5.2%	0.06	0.08	0.08	0.09	0.10	71.2%	27.5%	21.8%	11.6%
LDO	0.02	0.01	-40.3%	0.02	0.02	0.02	0.02	0.01	-29.5%	-38.1%	-41.5%	-41.8%
Sub Total	**3.8**	**3.9**	**2.2%**	**3.1**	**3.3**	**3.3**	**3.4**	**3.6**	**12.9%**	**6.3%**	**6.5%**	**4.5%**
Sub - Total (A) + (B)	**4.8**	**4.7**	**-1.8%**	**4.0**	**4.3**	**4.3**	**4.5**	**4.4**	**9.7%**	**3.9%**	**2.3%**	**-0.6%**
(C) Other Minor Decontrolled Products												
Petroleum coke	0.32	0.25	-22.9%	0.22	0.31	0.31	0.40	0.28	30.0%	-9.1%	-7.3%	-28.6%
Others	0.23	0.18	-22.8%	0.39	0.39	0.23	0.21	0.20	-48.8%	-48.8%	-12.1%	-5.0%
Sub Total	**0.5**	**0.4**	**-22.8%**	**0.6**	**0.7**	**0.5**	**0.6**	**0.5**	**-20.7%**	**-31.2%**	**-9.4%**	**-20.4%**
Total	**5.4**	**5.15**	**-4.0%**	**4.7**	**5.0**	**4.9**	**5.1**	**4.9**	**5.7%**	**-1.1%**	**1.0%**	**-3.0%**

*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