



Industry CONSUMPTION Report-POL & NG, February 2025

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CIRCULATION:

पेट्रोलियम और प्राकृतिक गैस मंत्रालय:	MoP&NG:
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Subject: Industry Consumption Review Report of PPAC: February 2025

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

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

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धन्यवाद,

Thanking you,

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Highlights of the month: February 2025

- India's Goods and Services Tax (GST) Revenue for February 2025 stood at Rs. 1,83,646 crores, marking a 9.1% increase from Rs. 1,68,337 crores in February 2024, as indicated by the country's gross and net GST collections data.
- India's manufacturing sector marks slow expansion in February 2025. The HSBC India Manufacturing PMI fell to 56.3 in February 2025, below initial estimates of 57.1 and January's 57.7.
- The average price of Indian Crude basket stood at \$77.73 per barrel in February 2025, down from \$80.20 per barrel in January 2025.
- India's power consumption grew marginally to 131.54 billion units (BU) in February, higher than 127.34 BU in the year-ago period, according to the government data.
- India Energy Week (IEW) 2025, held from February 11-14 at the Yashobhoomi Convention Centre, New Delhi, is one of the world's largest energy conferences, fostering global collaboration and innovation in the energy sector. The event focuses on India's transition to sustainable energy, showcasing advancements in biofuels, green hydrogen, renewable energy, and digitalization, while strengthening international partnerships and investments in oil and gas. Under PM Narendra Modi's leadership, India is positioning itself as a rising energy powerhouse, driving initiatives like "Panchamrit" to achieve net-zero emissions by 2070 and significantly reducing its carbon footprint.
- At the Conclusion of India Energy Week 2025, India has Cemented its Position as Global Energy Leader. World's second-largest energy conclave saw announcement of largest-ever exploration bid round, charted path for green energy transition while strengthening international partnerships
- The Union Budget 2025-26 has allocated ₹20,000 crore for R&D in Small Modular Reactors, targeting at least five indigenously designed operational SMRs by 2033. This aligns with India's target of 100 GW nuclear power capacity by 2047, a major step toward reducing carbon emissions and ensuring energy sustainability.
- India has achieved a historic milestone by surpassing 100 GW of installed solar power capacity, reinforcing its position as a global leader in renewable energy. India's solar power sector has witnessed an extraordinary 3450 % increase in capacity over the past decade, rising from 2.82 GW in 2014 to 100 GW in 2025.
- Petroleum and Natural Gas has issued revised guidelines for selection of dealers for regular & rural retail outlets, as well as unified guidelines for selection of LPG distributorships.
- Solar Energy Corporation of India Limited (SECI), a Navratna CPSU under the Ministry of New & Renewable Energy, has signed a Memorandum of Understanding (MoU) with the Government of Madhya Pradesh for setting up 200 MW Solar Project in Dhar under the CPSU Scheme and a 1000 MWh Battery Storage Project in the state.
- In a major step forward for India's advanced battery manufacturing sector, the Ministry of Heavy Industries (MHI), signed a Programme Agreement with Reliance New Energy Battery Limited under the PLI Scheme for Advanced Chemistry Cell (ACC) on February 17, 2025. This agreement awards a 10 GWh ACC capacity and makes it eligible to receive incentives under India's ₹ 18,100 crore PLI ACC scheme.

SUMMARY OF PRODUCT WISE POL

1. The consumption of petroleum products in February 2025 with a volume of 19.14 MMT registered a de-growth of 5.2% against the historical of 20.19 MMT in February 2024. February 2025 had one day less than February 2024 impacting growth of POL products.
2. MS (Petrol) consumption during the month of February 2025 with a volume of 3.17 MMT (1.01 mbpd) recorded a growth of 5.0% on the volume of 3.02 MMT (0.96 mbpd) in February 2024.
3. Ethanol blending in Petrol was 19.7% during Feb'25 and cumulative ethanol blending during November 2024-February 2025 was 18.0%.
4. The Domestic Sale of Passenger Vehicles in February 2025 with a volume of 3.31 lacs registered 3.7% growth over February 2024, as per SIAM with SUV the driver for the growth.
5. HSD (Diesel) consumption during the month of February 2025 with a volume of 7.34 MMT (2.00 mbpd) declined at 1.3% on the volume of 7.44 MMT (2.02 mbpd) in the month of February 2024.
6. LPG consumption during the month of February 2025 with a volume of 2.57 MMT registering a de-growth of 1.3% over the volume of 2.61 MMT in February 2024, growing in last 6 months riding on growth in PMUY segment and various state schemes. LPG consumption during the month had been largely driven by consumption in domestic packed having a share of 88.4% in the LPG pie.
7. ATF consumption during February 2025 with a volume of 0.74 MMT continued to register a growth of 4.2%, over a volume of 0.71 MMT during the month of February 2024. ATF consumption is increasing on account of growth in both the domestic & international air traffic in the Country. Growth was driven by additional movement to & fro for the Mahakumbh.
8. Bitumen consumption during February 2025 with a volume of 0.84 MMT registered a de-growth of 5.3% over the volume of 0.88 MMT in the month of February 2024.
9. Kerosene (SKO) consumption with a volume of 0.03 MMT registered a de-growth of 12.0% in February 2025 as compared to February 2024. SKO consumption during the month is largely constituted by PDS category with a 56% share.
10. Total Natural Gas Consumption (including internal consumption) for the month of February 2025 was 5789 MMSCM which was 0.6% higher than the corresponding month of the previous year. The cumulative consumption of 66975 MMSCM for the current financial year till February 2025 was higher by 9.1% compared with the corresponding period of the previous year.
11. As on 28th February 2025, number of active LPG domestic connections are 32.94 cr and PMUY connections 10.33 cr.



This report analyses the trend of consumption of petroleum products in the country during the month of February 2025. Data on product-wise monthly consumption of petroleum products for February 2025 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 February 2025 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-FEBRUARY 2025								
Product	February				April-February			
	2024	2025	% share of Feb'25	Growth (%)	2023-24	2024-25	Growth (%)	% share of Apr-Feb'25
(A) Sensitive Products								
LPG	2608	2573	13.4	↓ -1.3	27051	28608	↑ 5.8	13.1
SKO	36	32	0.2	↓ -12.0	447	375	↓ -16.2	0.2
Sub Total	2644	2605	13.6	-1.5	27499	28983	5.4	13.3
(B) Major Decontrolled Product								
HSD	7443	7343	38.4	↓ -1.3	81619	83333	↑ 2.1	38.2
MS	3023	3174	16.6	↑ 5.0	33896	36492	↑ 7.7	16.7
Naphtha	1142	954	5.0	↓ -16.5	12677	12158	↓ -4.1	5.6
ATF	705	735	3.8	↑ 4.2	7489	8184	↑ 9.3	3.7
Bitumen	882	835	4.4	↓ -5.3	7756	7370	↓ -5.0	3.4
FO/LSHS	523	477	2.5	↓ -8.9	5993	5991	0.0	2.7
Lubes+Greases	336	358	1.9	↑ 6.5	3711	4164	↑ 12.2	1.9
LDO	63	62	0.3	↓ -1.0	715	747	↑ 4.4	0.3
Sub Total	14116	13938	72.8	-1.3	153856	158438	3.0	72.6
(C) Other Minor Decontrolled Products								
Pet.Coke	2081	1838	9.6	↓ -11.7	18077	20119	↑ 11.3	9.2
Others*	1351	756	3.9	↓ -44.1	13254	10791	↓ -18.6	4.9
Sub Total	3432	2594	13.6	-24.4	31331	30910	-1.3	14.2
Total	20192	19136	100	-5.2	212686	218331	2.7	100

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

NOTE :

i) All figures are provisional.

ii) The source of information includes Oil Companies, DGCIS & online SEZ 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 December'24-February'25, which may undergo change on receipt of actual data), and

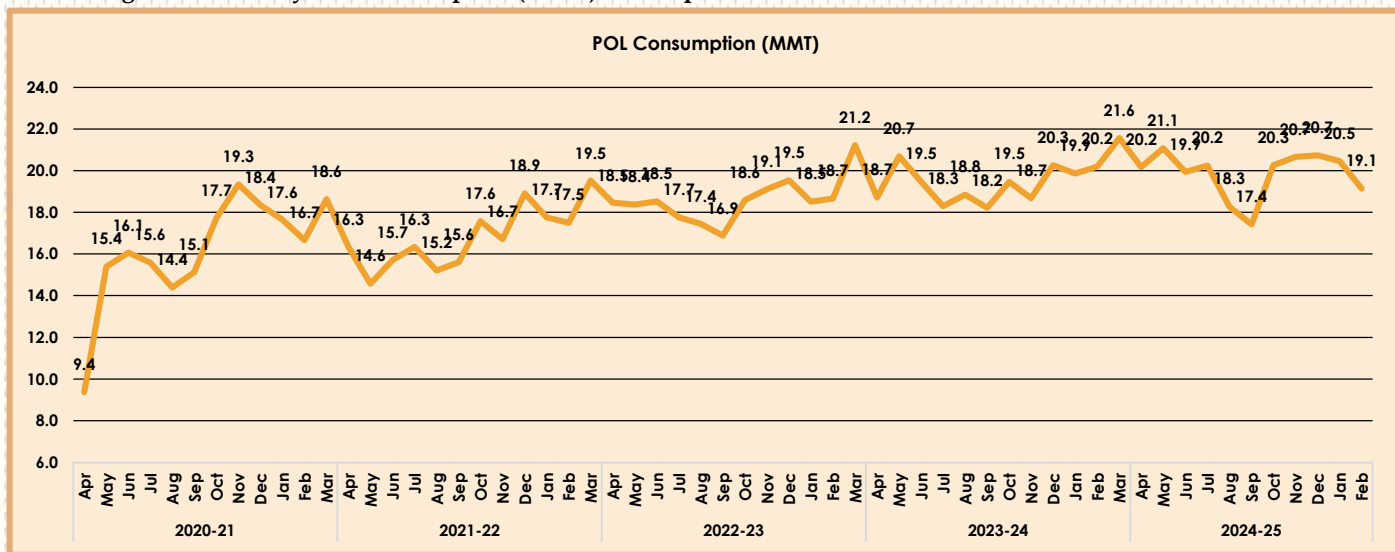
(c) sales by SEZ units in Domestic Tariff Area (DTA) are provisional due to portal upgrade.

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

Overall consumption of all petroleum products in February 2025 with a volume of 19.14 MMT de-grew by 5.2% over the volume of 20.19 MMT in February 2024. Growth in the POL was driven by growth in MS at 5.0%, ATF at 4.2% and Lubes+Greases at 6.5%.

Pan India based domestic POL monthly consumption trend since April-2020 is shown in Figure-A.

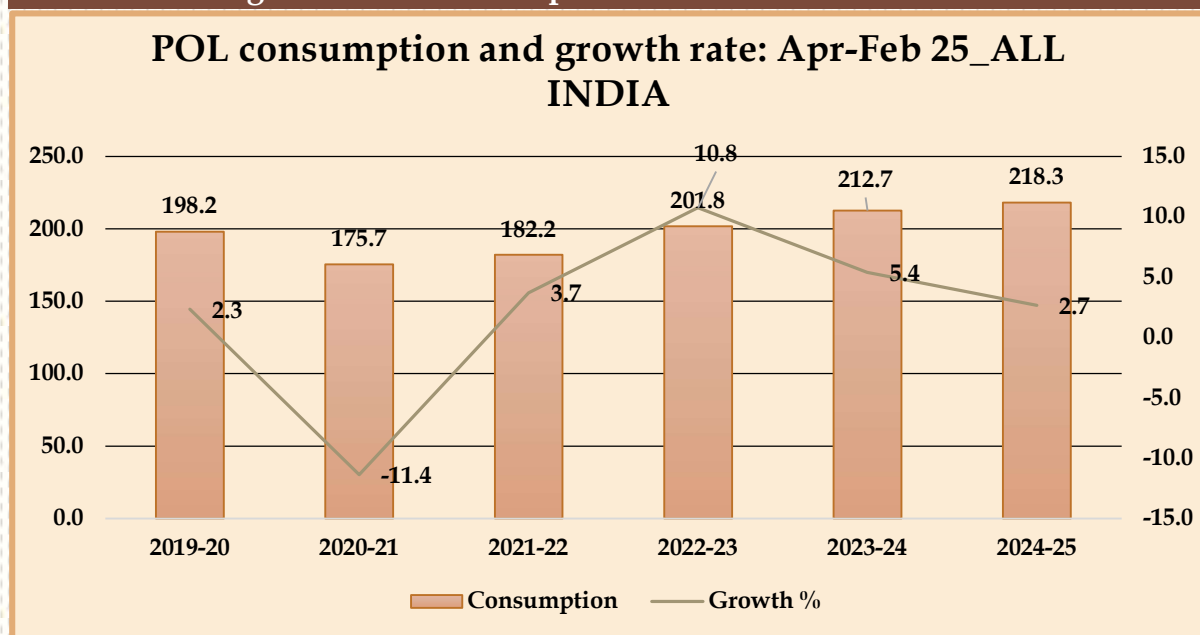
Figure-A: Monthly POL consumption (MMT) since April 2020



✓ The overall POL domestic consumption profile of the Apr-Feb 2025 & its pattern since 2019 with corresponding consecutive YoY growth rates are shown in the Figure-B; it is

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

Figure-B: POL consumption & Growth rate YoY basis



Source: PPAC Y2 data & OMCs sales

Sales data in TMT

Petrol/Motor Spirit (MS):

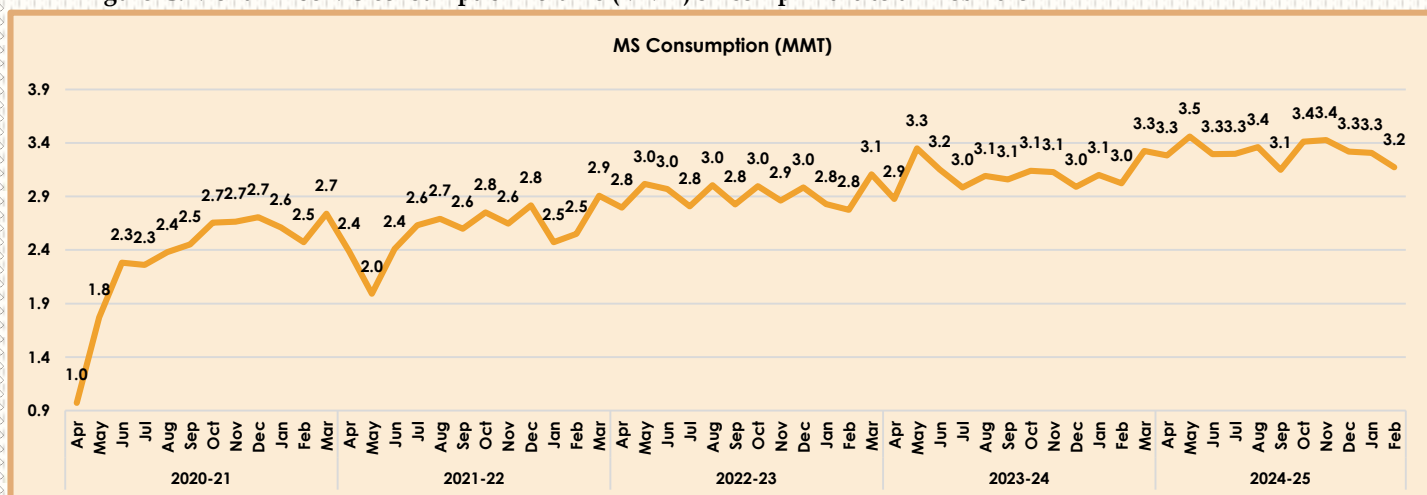
MS (Petrol) consumption during the month of February 2025 with a volume of 3.17 MMT recorded a growth of 5.0% on the volume of 3.03 MMT in February 2024.

PSU's registered a growth rate of 4.1% as against 15.0% achieved by their private sector counterparts in February-25. Market share held by PSU reduced by 0.83% (90.51% share) with corresponding increase in market share held by Private sector OMC's.

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

- The growth was impacted by loss of 1 day in Feb, last year being leap year
- The growth in MS is primarily on account of increased vehicle sales, personal mobility and disposable income, tourism (largely dominated by Mahakumbh 2025).
- Additionally, the gradual shift from diesel to petrol vehicles in the 4W SUV category continues to drive growth in MS sales..

Pan India based domestic MS monthly consumption trend since April 2020 is shown in Figure-C
Figure-C: Month wise MS consumption volume (MMT) since Apr- 2020 to till Feb-2025



Factors impacting consumption of MS:

Passenger Vehicle Sales:

The Sale of Passenger Vehicles in February 2025 at 3.31 lacs registered 3.7% growth YoY basis over sale of

3.20 lacs in the month of February 2024. The details of various segments of PVs are tabulated below, as shown in the following Table-2.

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

Vehicle Segment	February'25		
	2024	2025	Growth %age
Passenger Cars	1,15,937	1,10,966	-4.3%
Utility Vehicles	1,91,435	2,08,795	9.1%
Vans	12,147	11,493	-5.4%
Total PV	3,19,519	3,31,254	3.7%

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

Two-Wheeler Sales:

Two-wheeler sales in February 2025 with a volume of 13.85 lacs registered 9.0% de-growth, YoY basis over volume of 15.21 lacs during February 2024, as shown in the following table-3.

4.7%, YoY basis over the volume of 0.55 lac in February 2024, as shown in the following table-3

Three-wheeler domestic sales in February 2025 with a volume of 0.58 lac recorded a growth of

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

Vehicle Segment	February'25		
	2024	2025	Growth %age
Scooters/Scotrette	5,15,340	5,12,783	-0.5%
Motor Cycles/Step-Throughs	9,64,362	8,38,250	-13.1%
Mopeds	41,059	33,572	-18.2%
Total Two Wheelers	15,20,761	13,84,605	-9.0%
Passenger Carrier-3 wheeler	43,173	46,111	6.8%
Goods Carrier-3 wheeler	10,013	10,603	5.9%
E-Rickshaw	1,509	741	-50.9%
E-cart	480	333	-30.6%
Total Three Wheelers	55,175	57,788	4.7%

Source: SIAM

High Speed Diesel (HSD):

HSD (Diesel) consumption during the month of February 2025 with a volume of 7.34 MMT, registered a de-growth of 1.3% on the volume of 7.44 MMT in the month of February 2024.

- PSU's registered a 1.5% de-growth their private sector counterparts in the month of February-25.
- Market share held by PSU reduced by 0.13% (88.41% share) with corresponding increase in market share held by Private sector OMC's.

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

- Feb'24 being a leap year, so this year in Feb 25, consumption of 1 day impacted the figures.
- Above average temp in Feb pushed irrigation needs and may impact Rabi crop.
- Cross border tensions between Maharashtra and Karnataka impacted diesel sales due to restricted public transport for some period.
- Traffic jam on roads to Prayagraj impacted heavy vehicle movement.

Pan India based domestic HSD monthly consumption since Apr-20 is shown in the Fig-D. HSD market share in direct and retail sales is shown in the Fig-E.

Figure-D: Month-wise HSD consumption (MMT) since April 2020

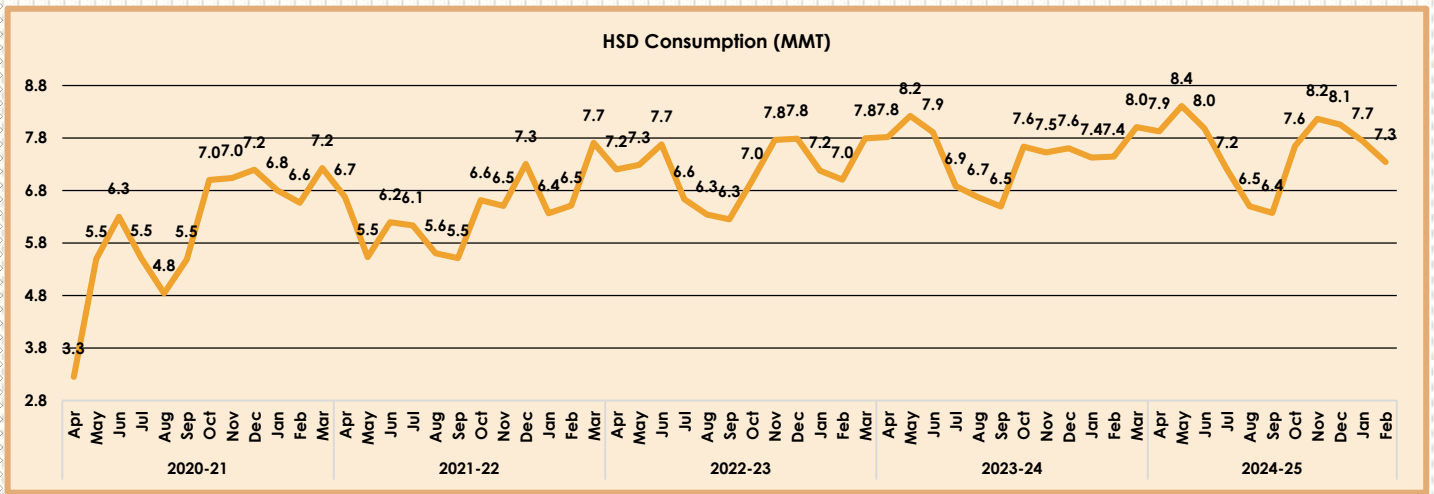
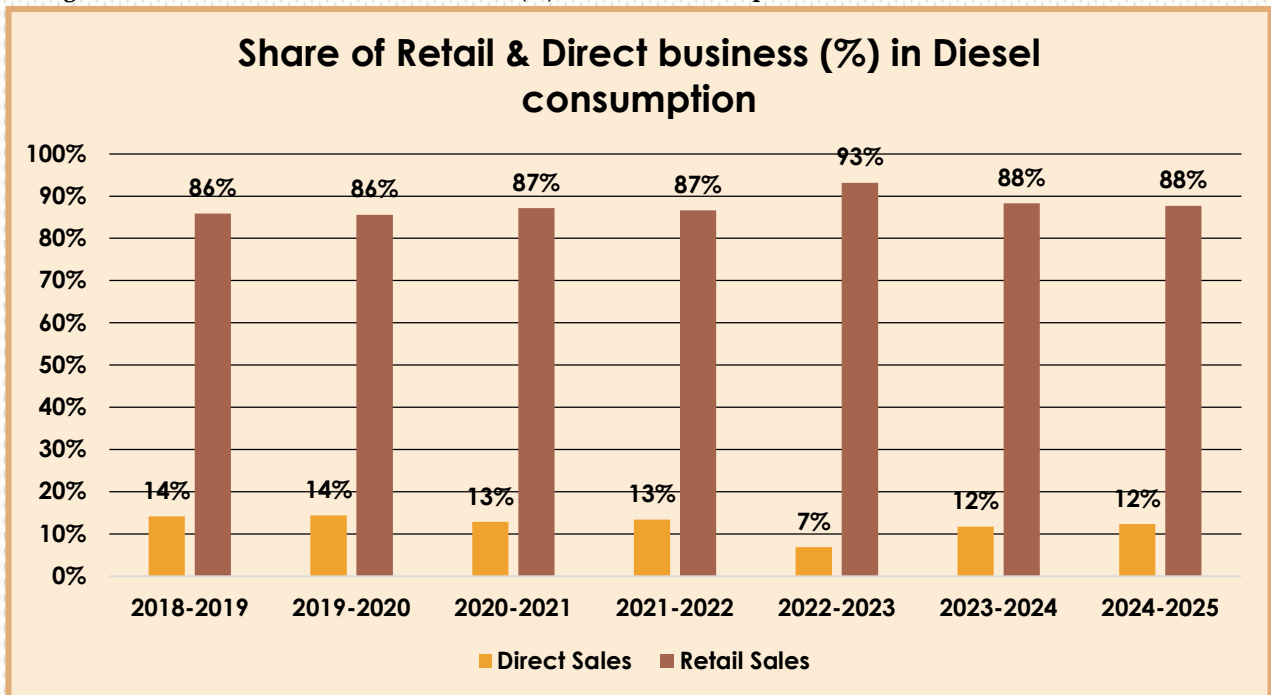


Figure-E: Share of Retail & Direct business (%) in Diesel consumption



Weather

In February 2025, the northern plains experienced noticeably warmer daytime temperatures and milder winters, with clear skies and minimal fog replacing the typical chill. Major states such as Delhi, Punjab, Haryana, and Uttar Pradesh recorded above-average maximum and minimum temperatures that improved travel conditions but raised concerns over the optimal growth conditions for winter crops like wheat, rapeseed, and chickpeas.

The Himalayan and far northern areas, including Jammu & Kashmir, Himachal Pradesh, and parts of Uttarakhand, saw unusually mild winter conditions with insufficient snowfall. Traditional heavy snowfalls that typically attract winter sports enthusiasts and support local water resources were replaced by warmer conditions, leading to the postponement of events like the national winter games in Gulmarg, Kashmir.

Central India experienced predominantly dry weather with consistently above-average temperatures and very little rainfall throughout February. States such as Madhya Pradesh and Chhattisgarh faced prolonged heat that compounded moisture deficits, stressing winter-sown crops and increasing the reliance on supplementary irrigation.

In Western India, conditions varied across subregions—while southwest Rajasthan and Gujarat witnessed a notable rise in temperatures, some parts of eastern Rajasthan experienced a slight cooling. Overall, the region remained dry with clear skies, which supported tourism and daily activities

Eastern India, including West Bengal, Odisha, Bihar, and Jharkhand, experienced warm conditions with scattered rainfall and intermittent thunderstorms. Early mornings in parts of Gangetic West Bengal and Odisha saw occasional fog, though the region was mostly marked by sunny, dry days that deviated from the traditional winter chill.

Southern India enjoyed bright, sunny, and predominantly dry conditions during February 2025, with steadily rising temperatures that were ideal for beach outings and outdoor activities. Coastal states such as Tamil Nadu (with cities like Chennai), Kerala, and Karnataka recorded warm weather with minimal rainfall, making it a popular time for tourism.

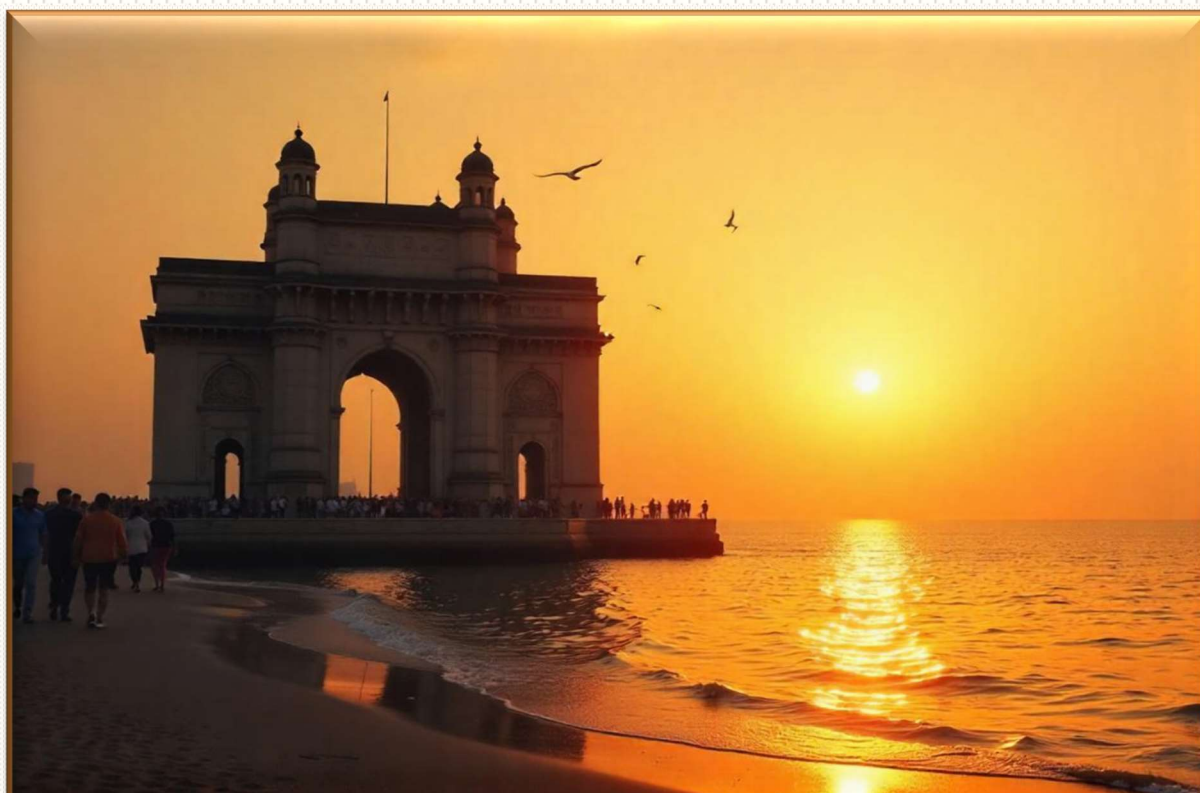


Figure- F: Sub-Division Rainfall Map for February 25 vs February 24. (Sourcew : Indian Metreological Department)

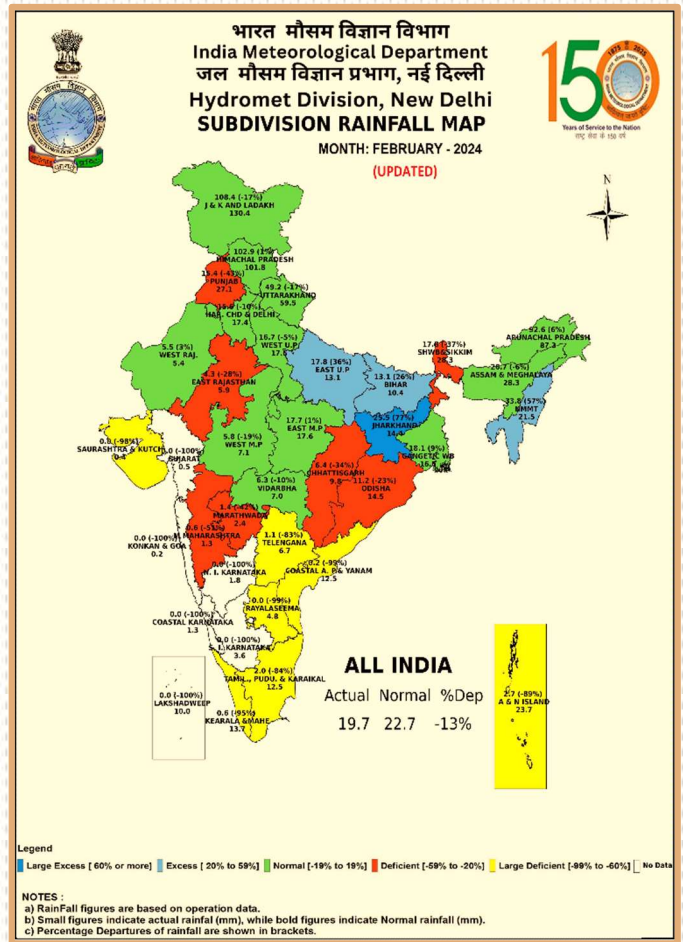
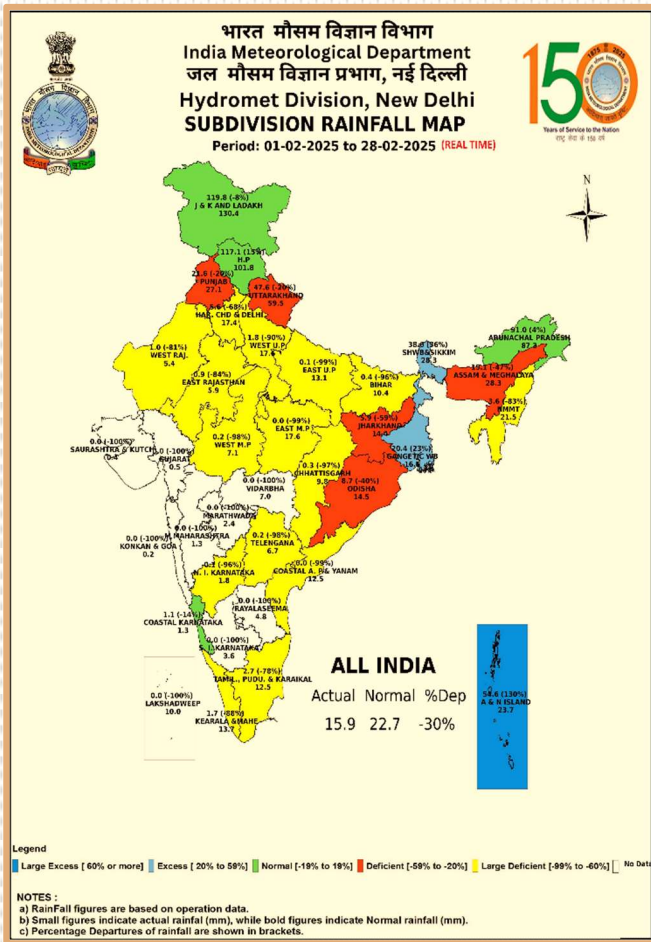


Table-4 Details of the Total E-Way Generated in CY vis-a-vis LY :

Month	(No of Eway Bills Generated in Lakhs)					
	Feb-25	Feb-24	Variance	Apr-Feb 25	Apr-Feb 24	Growth
Intra State	719.66	626.32	15%	7,604.13	6,521.07	17%
Inter State	396.77	346.68	14%	4,197.65	3,563.50	18%
Total	1,116.43	973.01	15%	11,801.78	10,084.57	17%

Source: GSTN Portal

E-Way Bill

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

Commercial Vehicle

Based on data from FADA Research, Indian domestic sales of commercial vehicles registered a de-growth of 8.6% as compared to February 2024 as shown in Table-4.

Tractor Sale:

Tractor domestic sales in February 2025 with a volume of 65,574 registered a de-growth of 14.5% over the volume of 76,693 in February 2024.

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

Commercial vehicles & tractors		February'25		
		2024	2025	Growth %age
CV	LCV	49,370	45,742	-7.3%
	MCV	6,561	6,212	-5.3%
	HCV	29,483	26,094	-11.5%
	Others	5,137	4,715	-8.2%
Total CVs		90,551	82,763	-8.6%
Tractors		76,693	65,574	-14.5%

Source: FADA research

Port Traffic:

The Major Ports achieved cargo throughput of 771.01 MMT during Apr-Feb 2025 which is 3.45% higher over same Period last year.

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

Ports	Apr-Feb'25	Apr-Feb'24	Growth (%)
Kolkata & Haldia	57696	61159	-5.66
Paradip	136249	132336	2.96
Visakhapatnam	73703	73468	0.32
Kamarajar (Ennore)	43831	40890	7.19
Chennai	49961	47197	5.86
V.O. Chidambaranar	37797	37443	0.95
Cochin	34177	32942	3.75
New Mangalore	41311	41971	-1.57
Mormugao	16134	19134	-15.68
Mumbai	62483	61255	2.00
JNPA	83847	78048	7.43
Deendayal	133825	119469	12.02
Total:	771014	745312	3.45

POWER SITUATION:

India's peak demand for power grew to 249.9 gigawatt (GW) in Apr-Feb'25 against 243.3 GW registered in the same period of last year. The peak demand is at similar level to its earlier peak of 249.8 GW registered in May'24 when the temperature

across the country rose drastically, data sourced from the Central Electricity Authority showed.

Peak demand met during Apr-Feb'25 stood at 249.85 GW ,which is almost same as the Peak Demand.

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

Year	Energy				Peak			
	Requireme nt	Availabi lity	Surplus(+)/Deficts(-)		Peak Demand	Peak Met	Surplus(+)/ Deficts(-)	
	(MU)	(MU)	(MU)	(%)	(MW)	(MW)	(MW)	(%)
2019-20	11,91,628	11,85,491	-6,137	-0.5%	1,83,804	1,82,533	-1,271	-0.7%
2020-21	11,54,328	11,50,028	-4,300	-0.4%	1,90,198	1,89,395	-803	-0.4%
2021-22	12,50,625	12,45,546	-5,079	-0.4%	2,03,014	2,00,539	-2,475	-1.2%
2022-23	13,85,159	13,77,790	-7,369	-0.5%	2,15,888	2,07,231	-8,657	-4.0%
2023-24	14,87,092	13,55,728	-1,31,364	-8.8%	2,43,271	2,39,931	-3,340	-1.4%
2024-25	15,47,785	15,46,229	-1,556	-0.1%	2,49,856	2,49,854	-2	0.0%

SECTORAL CONSUMPTION OF HSD:

During 'April-February-25, HSD total consumption with a volume of 83.33 MMT registered 2.1% growth Year-on Year basis over the volume of 81.62 MMT in 'April-February-24.

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

Growth of 2.1% during Apr-Feb'25 was driven by increased economic activity & freight movement, evident by a 17.6% jump in Inter-State E-way bill statistics.

In direct sales category, the sectoral consumption break up is shown in G(II) figure. i.e., for April-February-25' 'Road Transport' was 20%, the highest share followed by Railways share was 11%, Mining 14%, Manufacturing at 12%, Shipping 6%, Agriculture 4% and Power Generation 2%. Retail sales continue to cater to mostly the road transport.

Share of Railways dropped from 14% to 11% on account of electrification. Also share of Road transport & shipping reduced by 2% & 1% respectively.

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

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

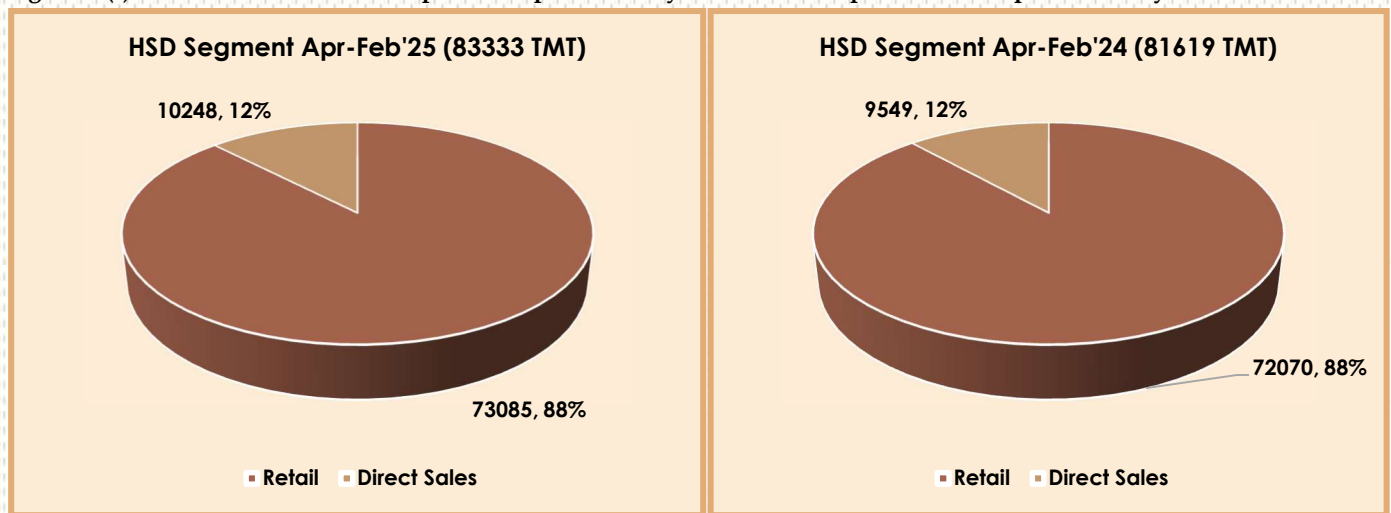
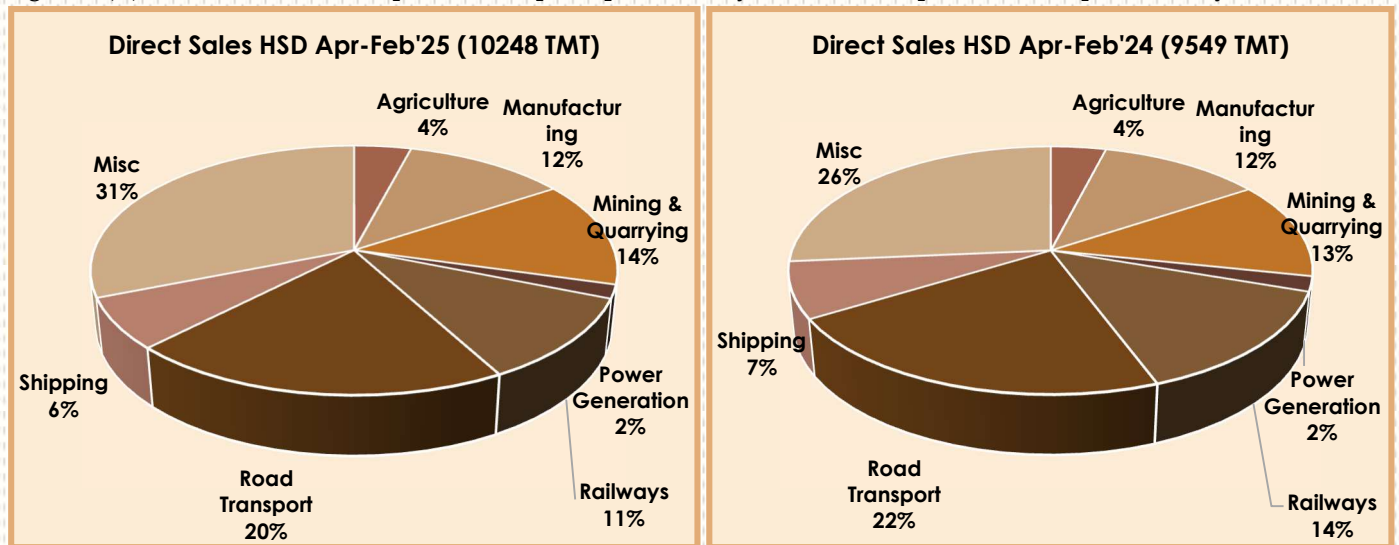


Figure-G(II): Sectoral HSD consumption Breakup in April-February-25 and its comparison with April-February-24



Share of Manufacturing has been maintained at 12% during the period of Apr-Feb-25 from 12% last year in the Direct Sales segment, Misc includes Cement Industry, Iron & Steel, Civil Engg, Chemicals & Allied, mechanical, Aluminium, Elec/Electronics, Fertilizers, Textiles, Ceramic & glass & other Misc Consumer/Industrials goods.

Kerosene:

Kerosene (SKO) consumption with a volume of 0.03 MMT registered a de-growth of 12.0% in February 2025 as compared to February 2024. SKO consumption during the month is largely constituted by PDS category

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

Lakshadweep, all UTs and the states of Andhra Pradesh, Delhi, Haryana, Punjab, Uttar Pradesh, Rajasthan, Gujrat and Goa. UTs of J&K, Ladakh and Lakshadweep alongwith States of Telangana & Utrakhhand have nil allocation this financial year.

The market share of subsidized-PDS and other SKO was 56% & 44% respectively for the month February 2025 as shown in the following figure-H.

Figure-H: Month-wise PDS & other-SKO consumption in share (%) since April 2020 to till date

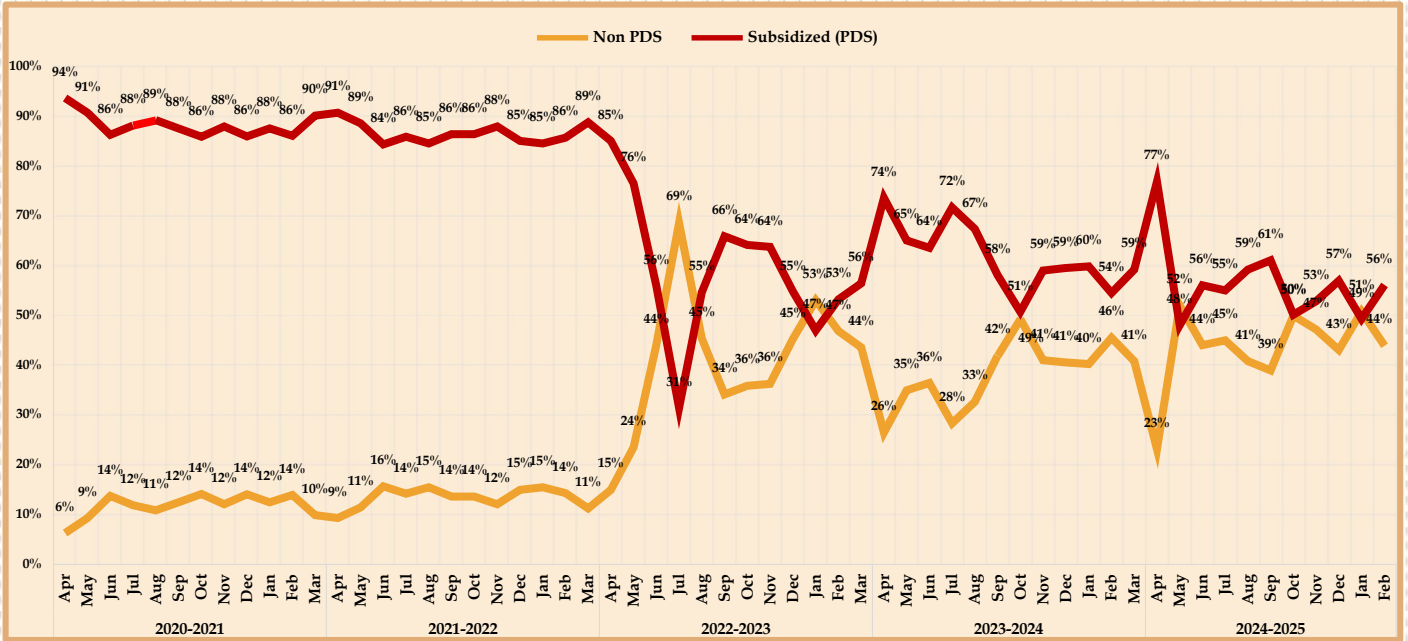
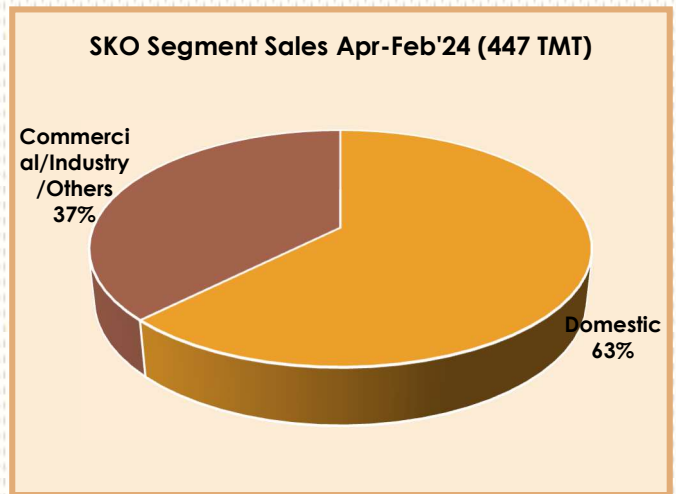
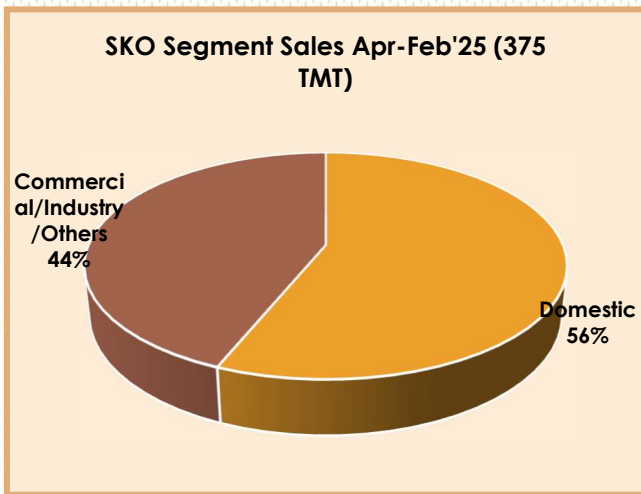


Figure-I: *Other SKO: non-subsidized PDS SKO +non-PDS kerosene



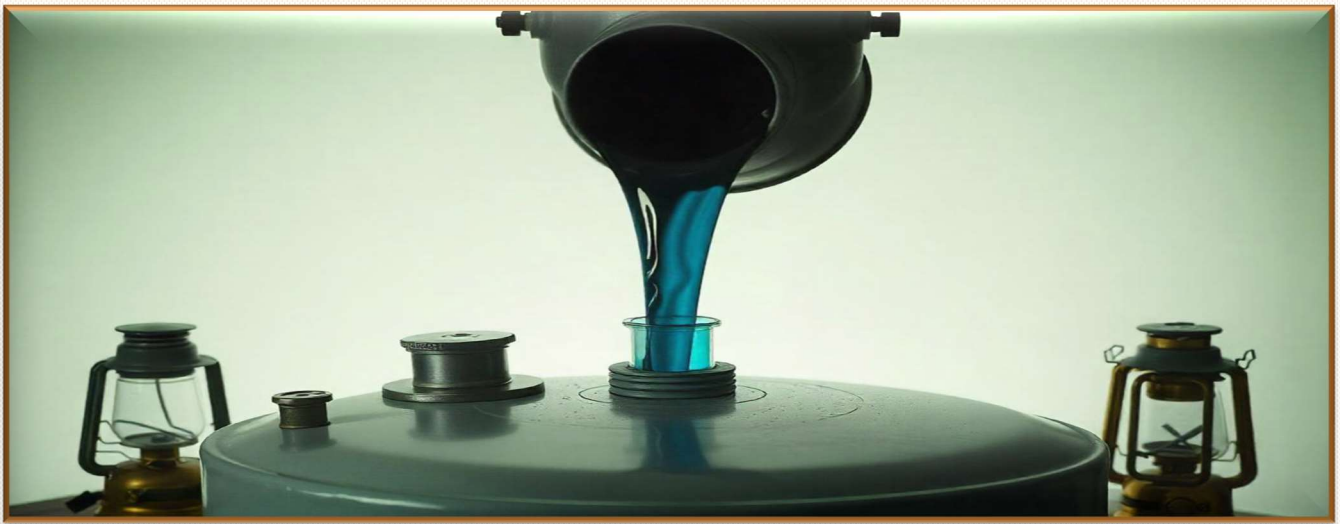
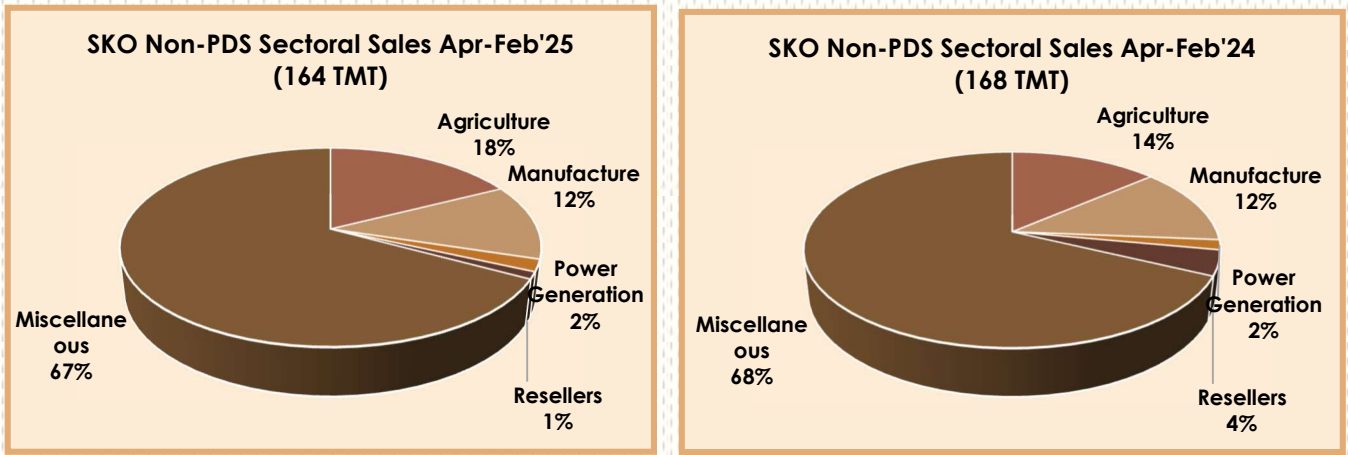
Sectoral consumption of SKO:

Out of total SKO sales during 'April-February-25 'PDS subsidized SKO' upliftment constituted to 56%. So far as sales in 'Other SKO' is concerned,' agriculture accounted for 18% share, Manufacturing 12%, and Miscellaneous applications at 67%.

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

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

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



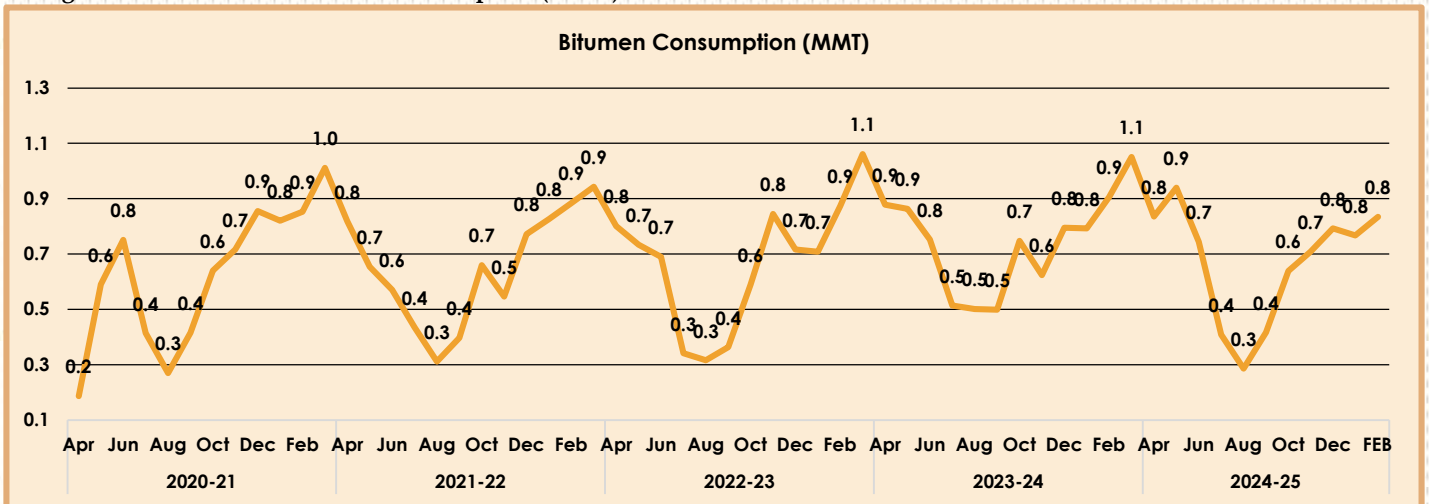
BITUMEN:

Bitumen consumption during February 2025 with a volume of 0.84 MMT registered de-growth of 5.3% over the volume of 0.88 MMT in the month of February 2024.

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

Pan India based domestic Bitumen monthly consumption since April-20 is shown in the Fig-K.

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



Sectoral consumption of Bitumen:

During 'April-February-25, total bitumen consumption with a volume of 7.37 MMT registered a de-growth of 5.0% Year-on Year basis over the volume of 7.76 MMT in 'April-February-24-FY2023-24'.

98% of cumulative bitumen sales during 'April-February-25-FY2024-25', was constituted to Road construction, balance 2% was consumed by miscellaneous industrie.

LPG:

LPG consumption during the month of February 2025 with a volume of 2.57 MMT registered de-growth in the month at 1.3% over the volume of 2.61 MMT in the month of February 2024. LPG consumption during the month continues to be largely driven by higher consumption in PMUY domestic packed with a share of 88.4%.

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

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

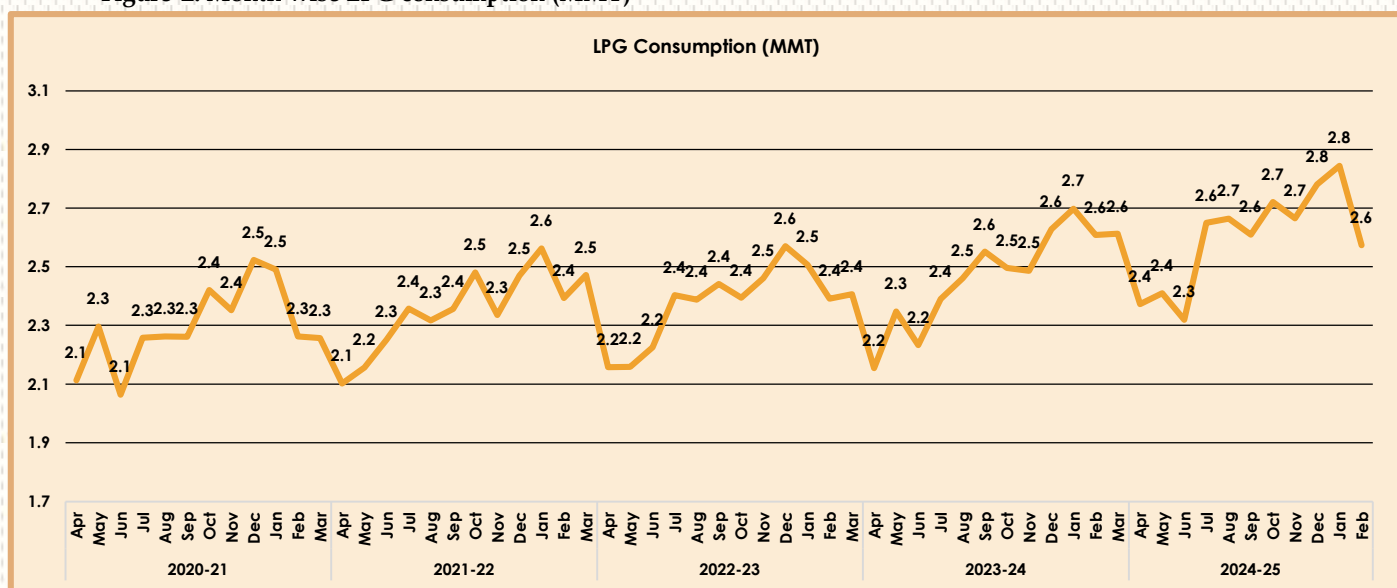
- 1.1% de-growth in Packed domestic LPG consumption in Feb'25 as compared to Feb'24.
- Under PMUY scheme 10.33 crores beneficiaries at the end of Feb 2025.
- As on 1.03.2024, total active domestic connections in India are 3294.3 lakhs

De-growth in consumption of domestic LPG in Feb'25 (28 days) compared to Feb'24 (29 days) are as follows:

- Lower cost of non-subsidized refill per 14.2 kg cyl. Price is Rs.803 in Feb'25 as compared to Rs. 903 in Feb'24 in Delhi, continued to drive growth.
 - PMUY cylinder available at Rs.503.00 in Feb'25 as compared to Rs.603.00 in Feb'24.
 - As of now, more than ~65.4% of non-PMUY consumers have DBCs connections and thus making a positive impact on LPG consumption. New connections ~86.9% issued with DBCs in Feb'25
4. 16.0 Crs cylinders of 14.2kg (~53.2 lacs/day) were delivered in Feb'25 compared to 16.1 Crs in Feb'24.
 5. Growth of 9.7% in Bulk LPG consumption due to decrease of price of bulk LPG in Feb'25 Rs. 77.4/kg as compared to Feb'24 rate was Rs. 76.0/kg.

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

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

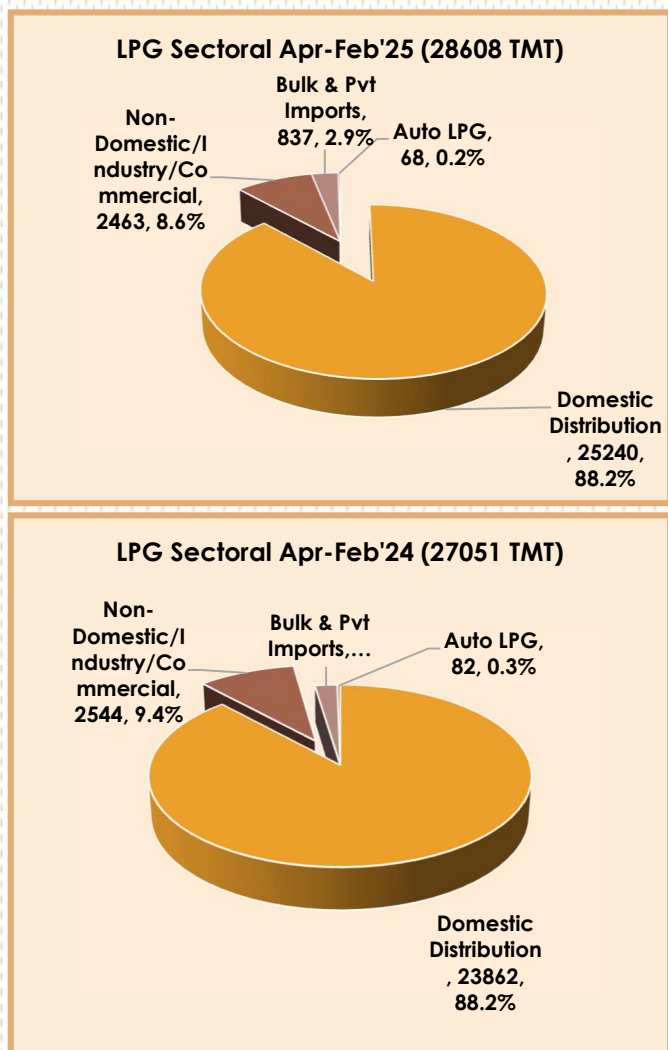


Sectoral consumption of LPG:

During 'April-February-25, total LPG domestic consumption with a volume of 28.61 MMT registered 5.8% growth Year-on Year basis over the volume of 27.05 MMT in 'April-February-24.

The Sectoral LPG consumption during 'April-February-25', was driven by Domestic packed at 88.2%, followed by LPG 'non-domestic/ industry/ commercial sector 8.6% & Bulk at 2.9%. Auto LPG at 0.2% has been on the negative trajectory getting displaced by CNG.

Figure-M: Sector wise LPG consumption of April-February-25-FY2024-25 (P) and its comparison with 'April-February-24



Naphtha:

Naphtha consumption during February 2025 with a volume of 0.95 MMT registered a de-growth of 16.5%, over a volume of 11.42 MMT during the month of February 2024.

Petrochemical industries remain the main consumers of naphtha. Naphtha consumption showed a de-growth during the month with reduced consumption in Petchem plants, due to the higher international prices.

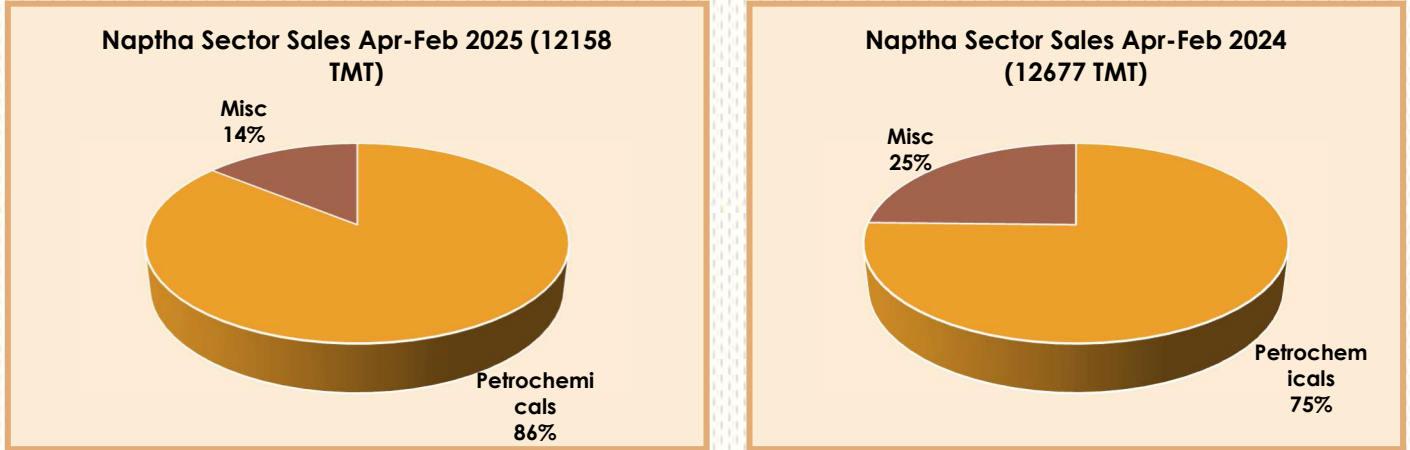
Sectoral consumption of Naphtha:

During 'April-February-25, total Naphtha domestic consumption with a volume of 12.16 MMT registered de-growth of 4.1% Year-on Year basis over the volume of 12.68 MMT in 'April-February-24.

Consumption of naphtha during this period was driven by petrochemicals sector 86%, whereas 14% Naphtha consumption fell in 'miscellaneous industries including power'.

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

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



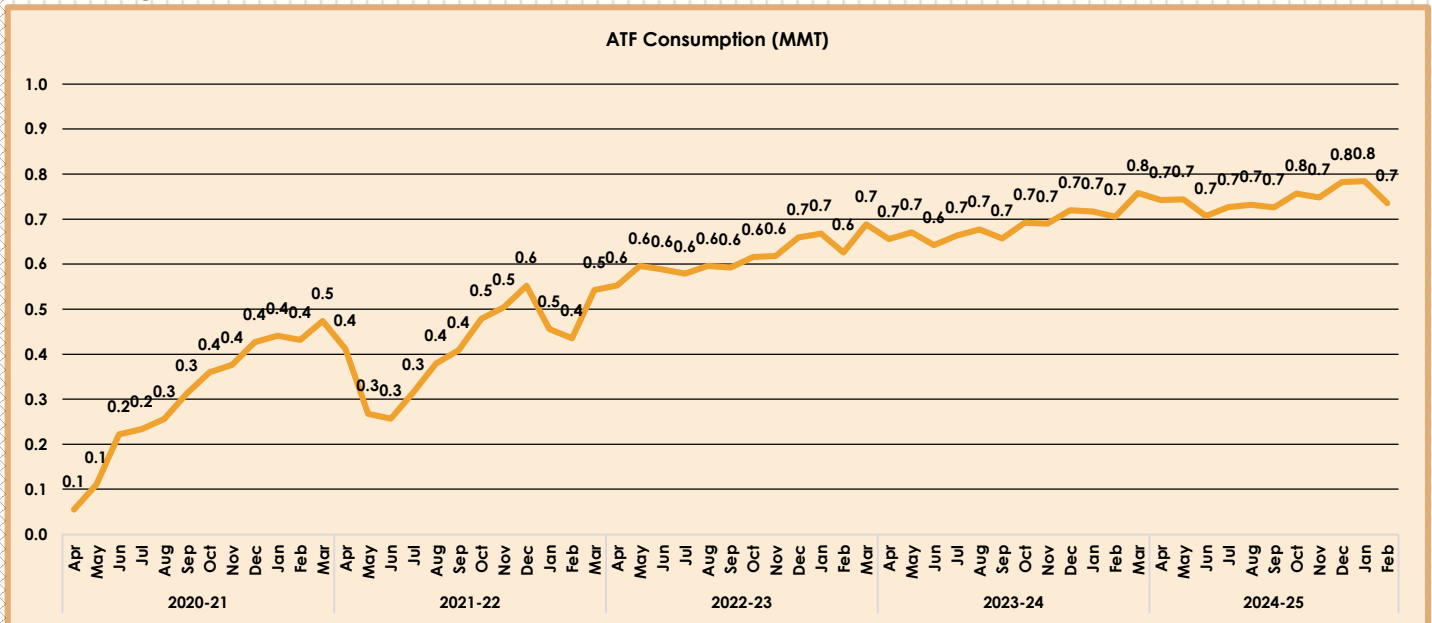
ATF:

ATF consumption during February 2025 with a volume of 0.74 MMT continued to registered a growth of 4.2%, over a volume of 0.71 MMT during the month of February 2024.

domestic travel. Aircraft movement due to Mahakumbh continued to drive growth of ATF during the month. Growth in international travel remains higher than the growth in the domestic sector, as noted in table-8A & 8B hereinunder.

ATF continues to grow, driven by a sustained rise in aircraft movements, as the year-end holiday season significantly boosted both international and Pan India based domestic ATF monthly consumption is given in following figure-O.

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

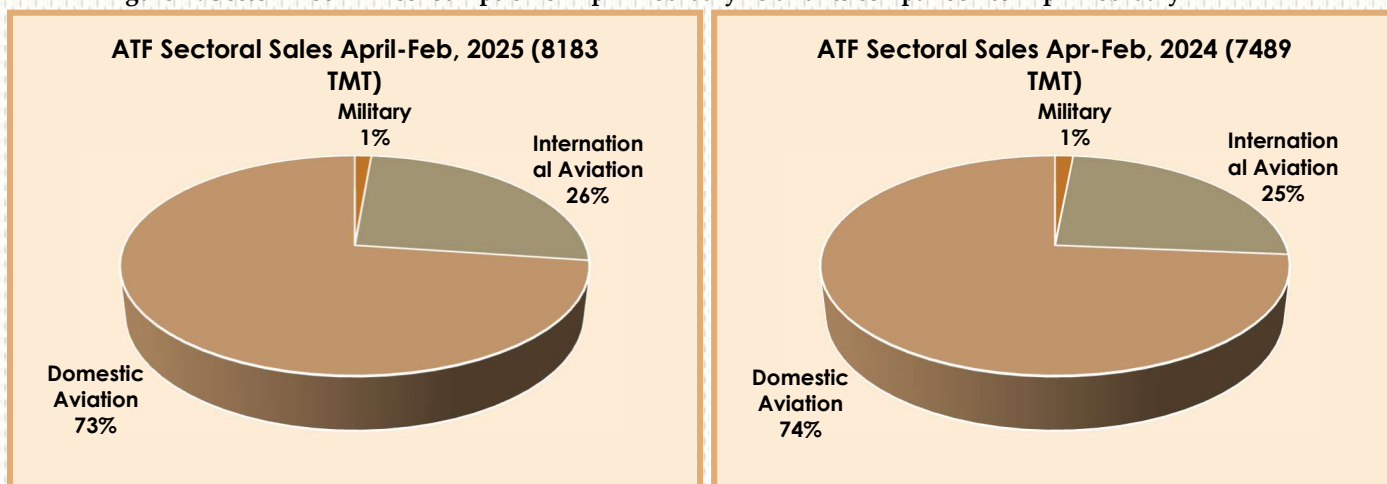


Sectoral consumption of ATF:

During 'April-February-25, total ATF domestic consumption with a volume of 8.18 MMT registered 9.3% growth Year-on-Year basis over the volume of 7.49 MMT in 'April-February-24.

Almost entire ATF consumption during 'April-February-25 was attributed to aviation; 73% domestic aviation, 26% international aviation & 1% Military aviation. Details comparisons and YoY analysis are pictorially presented in the following figures.

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



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

The above table reveals that the total aircraft movements, passengers and freight have increased at all Indian airports taken together during January 2025 over January 2024.

The International aircraft movements, domestic aircraft movements and total aircraft movements have increased by 10.1%, 7.6% and 9.0% respectively during (April-January) 2024-25 as compared to (April- January) 2023-24.

The International passengers traffic, domestic passengers traffic and total passenger traffic have increased by 11.4%, 8.7% and 9.2% respectively during the period (April- January) 2024-25 as compared to (April- January) 2023-24.

The International freight traffic, domestic freight and total freight traffic have increased by 17.2%, 6.5% and 12.9% respectively during the period (April- January) 2024-25 as compared to (April- January) 2023-24.

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

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

CATEGORY	APRIL - January		% CHANGE
	2024-25	2023-24	
Aircraft Movements (in '000)			
International	387.64	352.15	10.1
Domestic	2009.8	1867.73	7.6
Total	2397.44	2219.88	8
General Aviation	225.78	187.01	20.7
Grand Total(INTL+DOM+Gen)	2623.22	2406.89	9

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

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

REGION WISE TRENDS IN AIR TRAFFIC vis-à-vis ATF Consumption									
April-January 2024-2025									
REGION	April to January			Change	REGION	April to January		Change	Difference
	2024-2025	2023-2024	2024-2025			2023-2024			
	AIRCRAFT MOVEMENTS (IN NOS)					ATF CONSUMPTION (IN TMT)			
EASTERN	240256	225391	6.6%	EASTERN	473	450	5.1%	1.5%	
NORTH EAST	79721	86268	-7.6%	NORTH EAST	147	144	2.0%	-9.6%	
NORTHERN	539738	496131	8.8%	NORTHERN	2696	2415	11.6%	-2.8%	
SOUTHERN	616403	558814	10.3%	SOUTHERN	2256	2002	12.7%	-2.4%	
WESTERN	533681	501130	6.5%	WESTERN	1875	1771	5.8%	0.7%	
Total	2009799	1867734	7.6%	Total	7446	6783	9.8%	-2.2%	

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

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

FO/LSHS consumption during February 2025 with a volume of 0.477 MMT with a de-growth of 8.9% over the volume of 0.523 MMT in February-2024.

The degrowth is also by the reason of 2025 being a non leap year, hence has 1 day less than the previous year in Feb 24. Further consumption shift to lower emission fuels Natural gas etc due to increased availability with wider availability of gas coupled with banning of GO in various parts of the

Sectoral consumption of FO/LSHS:

During ‘April-February-25, total FO/LSHS consumption with a volume of 5.99 MMT with a

Further Product wise consumption for FO Apr-Feb’25 was 5.3 MMT vs 5.2 MMT in Apr-Feb’22 (1.5% Growth). For LSHS, Apr-Feb 25 was 0.72 TMT vs 0.80 TMT in Apr-Feb 24 (10.0 % De-growth)

country including NCR States has contributed to growth during Apr-Feb’25. Some companies shifted their internal fueling consumption from FO to CNG due to environmental obligations. Bunkering FO consumption reduced marginally during the month.

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

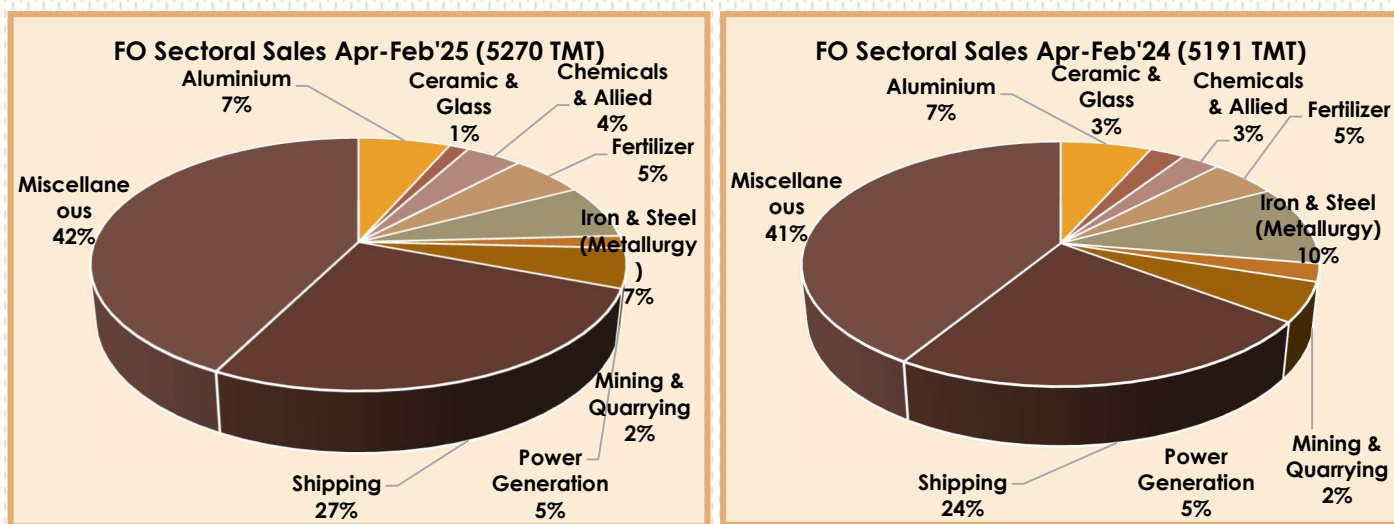
- The sectors of Iron & steel sector showed major degrowth during the month.
- The Shipping sector were the sectors where the majority of the product share is still prevalent

lesser de-growth of 0.0% Year-on Year basis over the volume of 5.99 MMT in ‘April-February-24 .

Details YoY comparisons are pictorially presented in the following figure.



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



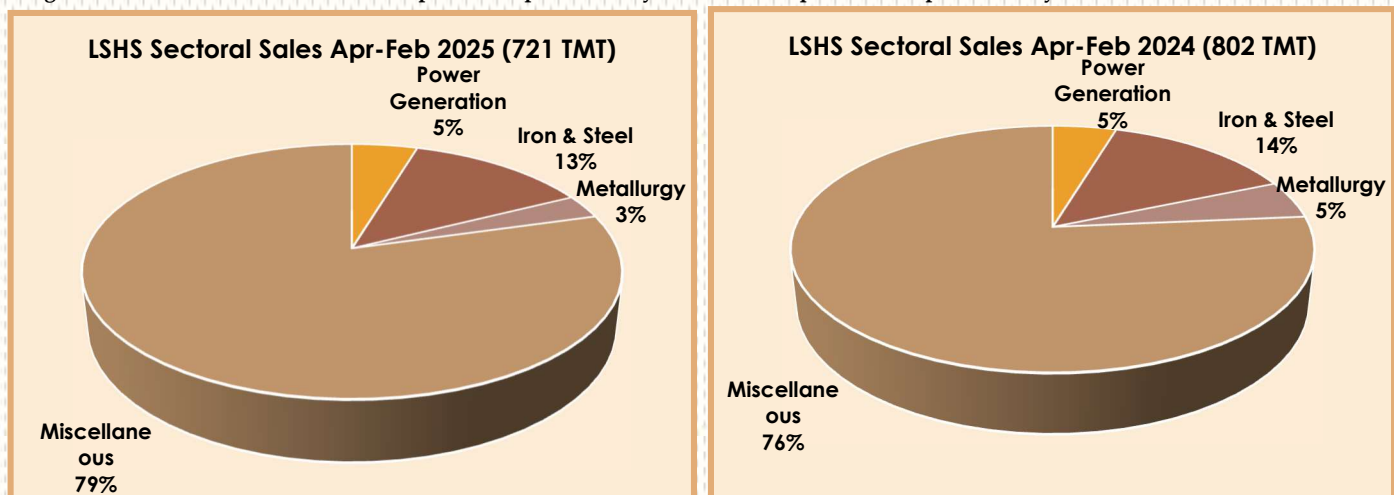
Apr-February 25:-

Shipping sector have the share of 27%, up from 24% from previous period, followed by Iron & steel, fertilizer and Aluminium.

Apr- February 24:-

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

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



April-February 25:-

Iron & Steel sector contributed to be the largest sector followed with 13% by Power Generation 5%

April- February 24:-

Iron & steel contributes the highest share with 14% followed by Power generation & Metallurgy

Petcoke:

Petcoke consumption during the month of February 2025 with a volume of 1.84 MMT with a de-growth 11.7% over the volume of 2.08 MMT same period last year.

Directorate General of Foreign Trade (DGFT) under Ministry of Commerce and Industry has banned import of petcoke for use as fuel but has allowed its import only for use as feedstock in some select industries such as cement, lime kiln, calcium carbide and gasification industries.

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

- Petcoke demand by the Cement industry shows a de-growth. Also, sectoral share of Cement shows a decline.
- Feb 25 had 1 day less as compared to Feb 24 hence the consumption decline is observed.
- Few Small scale industries like Iron & steel etc use petcoke as a fuel, as also gassified for synthetic gas production.

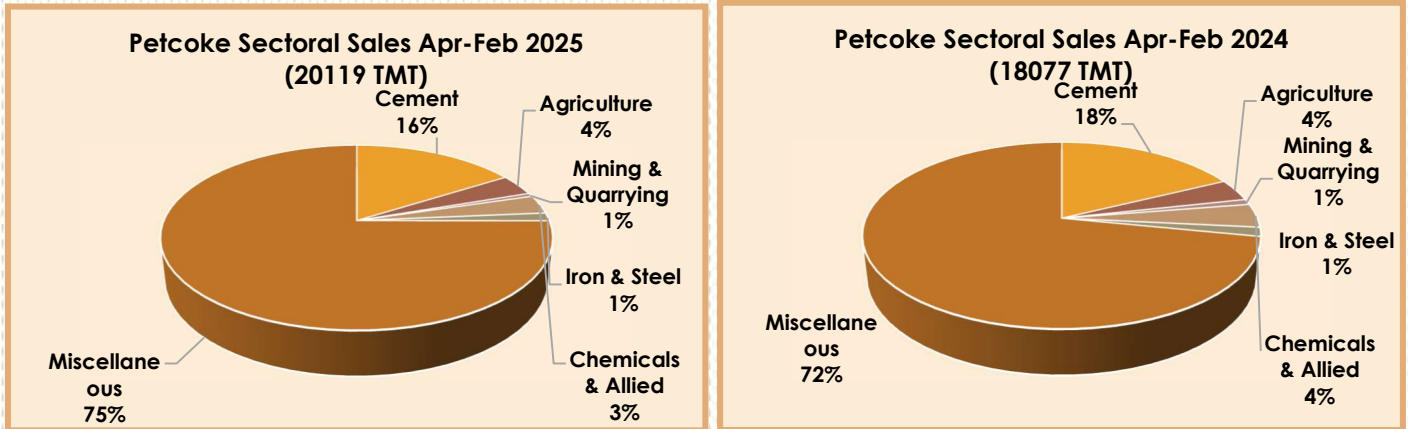
Sectoral consumption of Petcoke:

During 'April-February-25', total petcoke cumulative domestic consumption with a volume of 20.12 MMT registered 11.3% growth Year-on Year basis over the volume of 18.08 MMT in 'April-February-24'.

The cement sector continues to occupy the largest share in 'April-February-25-' (P) at 16% followed by other industries.

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

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



Apr-February 25:-
Cement industry occupied the highest share at 16%, followed by other sectors, down from 18% during last year.

Apr-February 24:-
Cement industry occupied the highest share at 18%, followed by other sectors.

Light Diesel Oil:

LDO consumption during the month February 2025 with a volume of 0.062 MMT registered a 1.0% de-growth over the volume of 0.063 MMT in February 2024.

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

LDO consumption in the power sector is primarily associated with initial light-ups. During the month, its usage rose due to heightened demand from thermal power stations, especially those located in the Eastern region.

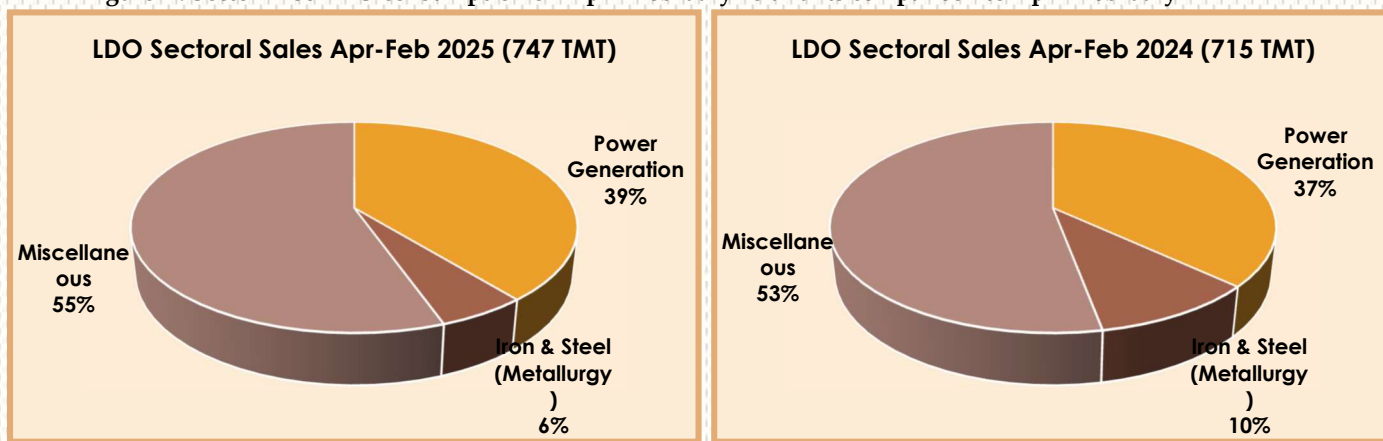
Sectoral consumption of Light Diesel Oil:

During 'April-February-25, total LDO domestic consumption with a volume of 0.75 MMT registered a 4.4% growth Year-on Year basis over the volume of 0.72 MMT in 'April-February-24.

The cumulative consumption of Light Diesel oil (LDO) during 'April-February-25' was driven by 'Power Generation' 39% followed by Iron & Steel at 6%. Detailed comparisons are pictorially presented in the following figures



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



Apr-February 25:-
Power Generation occupied a 39% share for the product followed by Iron & Steel & Misc industries

Apr-February 24:-
Power Generation occupied a 37% share for the product followed by Iron & Steel & Misc industries

Natural Gas:

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

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

Total Natural Gas Consumption (including internal consumption) for the month of February 2025 was 5789 MMSCM which was 0.6% higher than the corresponding month of the previous year. The cumulative consumption of 66975

MMSCM for the current financial year till February 2025 was higher by 9.1% compared with the corresponding period of the previous year.

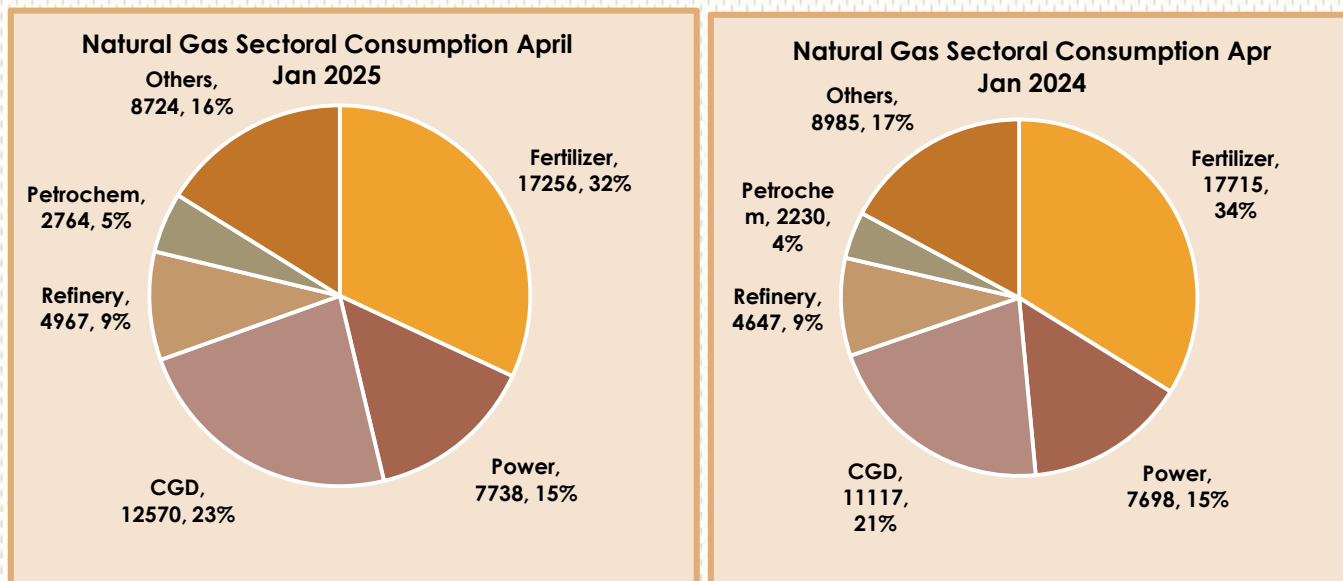
Sectoral consumption of Natural Gas consumption of 'Apr-Jan-25' & its comparison to 'Apr-Jan-24: (PROVISIONAL)

During Apr-Jan-25, total Natural Gas monthly domestic consumption with a volume of 54,019 MMSCM, over the volume of of 52,393 MMSCM during the same period in the preceeding year

During Apr- Feb-25 (sectoral data not available for February 25 at the time of release of this report)', consumption of Natural gas (NG) was driven by fertilizer (32%) followed by CGD (23%), Power (15%) Refinery (9%), Petrochemicals (5%). Misc sectors occupied a share of 16% in Apr-Jan 2025.



Figure-U: Sector wise consumption of Natural Gas of Apr-Jan 2025 and its comparison to Apr-Jan 2024



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

P: provisional

Apr-Jan 2025	Apr-Jan 2023
Fertilizer sector occupied the highest share for the Consumption of Natural Gas at 32% with the share of CGD increasing steadily.	Fertilizer sector occupied the highest share followed by CGD.

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

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

Table-10

Industry Consumption Trend Analysis 2024-25 (Provisional)												
('000 MT)												
Product	April-February 2024-25			February								
	FY2023-24	FY2024-25	Growth(%)_2024-25 over 2023-24	2021	2022	2023	2024	2025	Growth(%)_2024 over 2021	Growth(%)_2024 over 2022	Growth(%)_2024 over 2023	Growth(%)_2025 over 2024
(A) Sensitive Products												
LPG	27051	28608	5.8	2262	2393	2391	2608	2573	13.7	7.5	7.6	-1.3
SKO	447	375	-16.2	137	117	33	36	32	-76.8	-72.8	-4.4	-12.0
Sub Total	27499	28983	5.4	2399	2511	2425	2644	2605	8.6	3.8	7.4	-1.5
(B) Major Decontrolled Product												
HSD	81619	83333	2.1	6569	6511	7003	7443	7343	11.8	12.8	4.9	-1.3
MS	33896	36492	7.7	2472	2550	2776	3023	3174	28.4	24.5	14.3	5.0
Naphtha	12677	12158	-4.1	1217	1100	1067	1142	954	-21.6	-13.3	-10.6	-16.5
ATF	7489	8184	9.3	432	435	626	705	735	70.2	69.0	17.4	4.2
Bitumen	7756	7370	-5.0	853	884	874	882	835	-2.1	-5.6	-4.5	-5.3
FO & LSHS	5993	5991	0.0	476	530	576	523	477	0.2	-10.1	-17.3	-8.9
Lubricants & Greases	3711	4164	12.2	388	380	333	336	358	-7.7	-5.8	7.4	6.5
LDO	715	747	4.4	80	85	56	63	62	-22.2	-27.1	10.5	-1.0
Sub Total	153856	158438	3.0	12485	12475	13312	14116	13938	11.6	11.7	4.7	-1.3
Sub - Total (A) + (B)	181355	187421	3.3	14884	14985	15737	16760	16542	11.1	10.4	5.1	-1.3
(C) Other Minor Decontrolled Products												
Petroleum coke	18077	20119	11.3	794	1520	1568	2081	1838	131.6	20.9	17.2	-11.7
Others	13254	10791	-18.6	993	992	1354	1351	756	-23.9	-23.8	-44.2	-44.1
Sub Total	31331	30910	-1.3	1786	2512	2923	3432	2594	45.2	3.3	-11.3	-24.4
Total	212686	218331	2.7	16671	17497	18659	20192	19136	14.8	9.4	2.6	-5.2

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

Table-11

Industry Consumption Trend Analysis 2024-25 (Provisional)												
('Million Barrels per Day)												
Product	April-February 2024-25			February								
	FY2023-24	FY2024-25	Growth(%) 2024-25 over 2023-24	2021	2022	2023	2024	2025	Growth(%)_20 24 over 2021	Growth(%)_20 24 over 2022	Growth(%)_20 24 over 2023	Growth(%)_20 25 over 2024
(A) Sensitive Products												
LPG	0.93	0.99	5.8%	0.94	0.99	0.99	1.08	1.07	13.7%	7.5%	7.6%	-1.3%
SKO	0.01	0.0090	-16.2%	0.04	0.03	0.01	0.01	0.01	-76.8%	-72.8%	-4.4%	-12.0%
Sub Total	0.9	1.0	5.5%	1.0	1.0	1.0	1.1	1.1	10.1%	4.8%	7.5%	-1.4%
(B) Major Decontrolled Product												
HSD	1.85	1.89	2.1%	1.79	1.77	1.90	2.02	2.00	11.8%	12.8%	4.9%	-1.3%
MS	0.90	0.96	7.7%	0.78	0.81	0.88	0.96	1.01	28.4%	24.5%	14.3%	5.0%
Naphtha	0.33	0.32	-4.1%	0.38	0.34	0.33	0.36	0.30	-21.6%	-13.3%	-10.6%	-16.5%
ATF	0.18	0.20	9.3%	0.12	0.13	0.18	0.20	0.21	70.2%	69.0%	17.4%	4.2%
Bitumen	0.14	0.13	-5.0%	0.18	0.19	0.19	0.19	0.18	-2.1%	-5.6%	-4.5%	-5.3%
FO & LSHS	0.12	0.12	0.0%	0.11	0.13	0.14	0.13	0.11	0.2%	-10.1%	-17.3%	-8.9%
Lubricants & Greases	0.08	0.09	12.2%	0.10	0.10	0.09	0.09	0.09	-7.7%	-5.8%	7.4%	6.5%
LDO	0.02	0.02	4.4%	0.02	0.02	0.01	0.02	0.02	-22.2%	-27.1%	10.5%	-1.0%
Sub Total	3.6	3.7	3.2%	3.5	3.5	3.7	4.0	3.9	12.1%	12.3%	5.1%	-1.1%
Sub - Total (A) + (B)	4.6	4.7	3.6%	4.5	4.5	4.7	5.1	5.0	11.7%	10.6%	5.6%	-1.2%
(C) Other Minor Decontrolled Products												
Petroleum coke	0.30	0.33	11.3%	0.16	0.30	0.31	0.41	0.36	131.6%	20.9%	17.2%	-11.7%
Others	0.32	0.26	-18.6%	0.29	0.29	0.39	0.39	0.22	-23.9%	-23.8%	-44.2%	-44.1%
Sub Total	0.6	0.6	-4.2%	0.4	0.6	0.7	0.8	0.6	31.2%	-0.9%	-17.0%	-27.4%
Total	5.2	5.31	2.7%	4.9	5.1	5.4	5.9	5.6	13.4%	9.3%	2.7%	-4.8%

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



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