



# Petroleum Planning & Analysis Cell

Ministry of Petroleum & Natural Gas, Government of India

April 2020

## Industry Consumption Report





## Contents

Highlights .....	3
CONSUMPTION .....	4
<b>All Products:</b> .....	4
<b>Petrol/Motor Spirit (MS):</b> .....	5
<b>High Speed Diesel (HSD):</b> .....	6
<b>Port Traffic:</b> .....	7
<b>Power situation:</b> .....	8
<b>Seasonal rainfall scenario:</b> .....	8
<b>Kerosene:</b> .....	9
<b>Bitumen:</b> .....	10
<b>LPG:</b> .....	10
<b>Naphtha:</b> .....	12
<b>ATF:</b> .....	12
<b>Furnace oil &amp; Low sulphur heavy stock (FO/LSHS):</b> .....	12
<b>Petcoke:</b> .....	13
<b>LDO:</b> .....	13

# Highlights

The month of April 2020 saw a complete lock down to contain the COVID-19 pandemic while some easing was observed in lock down 3.0 from 4th May 2020 to 17th May 2020. The lock down 4.0 from 18th May 2020 to 31st May 2020 has seen further relaxed restrictions in containment measures adopted and thereby spurring most of the sectors of the economy. A bid to contain the spread of virus in the country in April resulted in complete halt of both manufacturing and services sector, allowing only essential services to run. It impacted the supply-chain of many industries. Major industries like Steel, Iron, general trade, automotive & ancillary, gems & jewellery, textile, commercial/entertainment, hospitality and textiles largely remained shut. Essential sectors such as certain chemicals, fertilizers, health care, agriculture and coal mining continued during the month.

**The summary of product-wise impact on consumption in the month of April 2020 is as follows.**

1. Overall, Petroleum products consumption during the month of April 2020 recorded a de-growth of -45.8% as compared to consumption in April 2019. LPG was the only product which registered growth of 12.2% during April 2020 as compared to same period previous year. The products which registered de-growth were Diesel (HSD) -55.6%, Petrol (MS) -60.4%, Naphtha -9.4%, Aviation Turbine Fuel (ATF) -91.3%, Bitumen -71.7%, Furnace Oil & Low Sulphur Heavy Stock (FO/LSHS) -40.3%, Lubes & Greases -16.9%, Light Diesel Oil (LDO) -38.4%, Pet coke -49.6%, and products categorised under "Others" category -36.6%. Kerosene (SKO) recorded a de-growth of -49.3% during the current month.
2. Petrol (MS) consumption recorded its second consecutive dip after a steady growth for thirty months in a row, registering a de-growth of -60.4% in the month of April 2020 with consumption of 0.9 MMT as compared to 2.4 MMT in April 2019. MS sales recorded a de-growth due to strict restrictions imposed to contain spread of virus on all non-essential vehicular traffic movement across the country.
3. Diesel (HSD) consumption during the month recorded a de-growth of -55.6%, with a consumption of 3.2 MMT in April 2020 as compared to 7.3 MMT in April 2019. A sharp fall was witnessed due to complete suspension of all industrial and transportation activities with an exception of agricultural activities and essential services. The power demand in April 2020 decreased by 22.0% as compared to April 2019 and power deficit increased to -0.5% as compared to -0.4% in the month of April 2019. Rainfall during the month was 8% above the normal distribution. A de-growth of -21.0% was recorded in port traffic during April 2020 as compared to April 2019.
4. LPG consumption recorded a growth of 12.2% in April 2020 as compared to April 2019 mainly due to government scheme of free refill of cylinders for poor households. Also as people stayed at home, it contributed positively to enhance domestic consumption of LPG cooking gas.

5. ATF consumption registered a de-growth of -91.3% in the month of April 2020 as all the planes across the airlines industry had been grounded except for certain flights engaged in moving essential cargoes like medicines and pharmaceuticals. Certain flights were also pressed in special services to evacuate stranded Indian Nationals.
6. Bitumen consumption during April 2020 recorded a de-growth of -71.7% as compared to April 2019, mainly due to certain road maintenance activities being operational during the month.
7. Kerosene (SKO) consumption registered a de-growth of -49.3% in April 2020 as compared to April 2019 mainly due to few States & all Union Territories except UT of Jammu & Kashmir and Ladakh going Kerosene free. Nil upliftment of kerosene was observed in the UT of Ladakh and states of Sikkim & Uttrakhand during the month of April 2020.

This report analyses the trend of consumption of petroleum products in the country during the month of April 2020. Data on product-wise monthly consumption of petroleum products for April 2020 is uploaded on the PPAC website ([www.ppac.gov.in](http://www.ppac.gov.in)) and on the mobile app “PPACE (PPAC-Easy)”.

## CONSUMPTION

The growth (%) in consumption of petroleum products, category-wise, for the month of April 2020 is given in Table-1.

**Table-1: Petroleum Products Consumption (Quantity in TMT)**

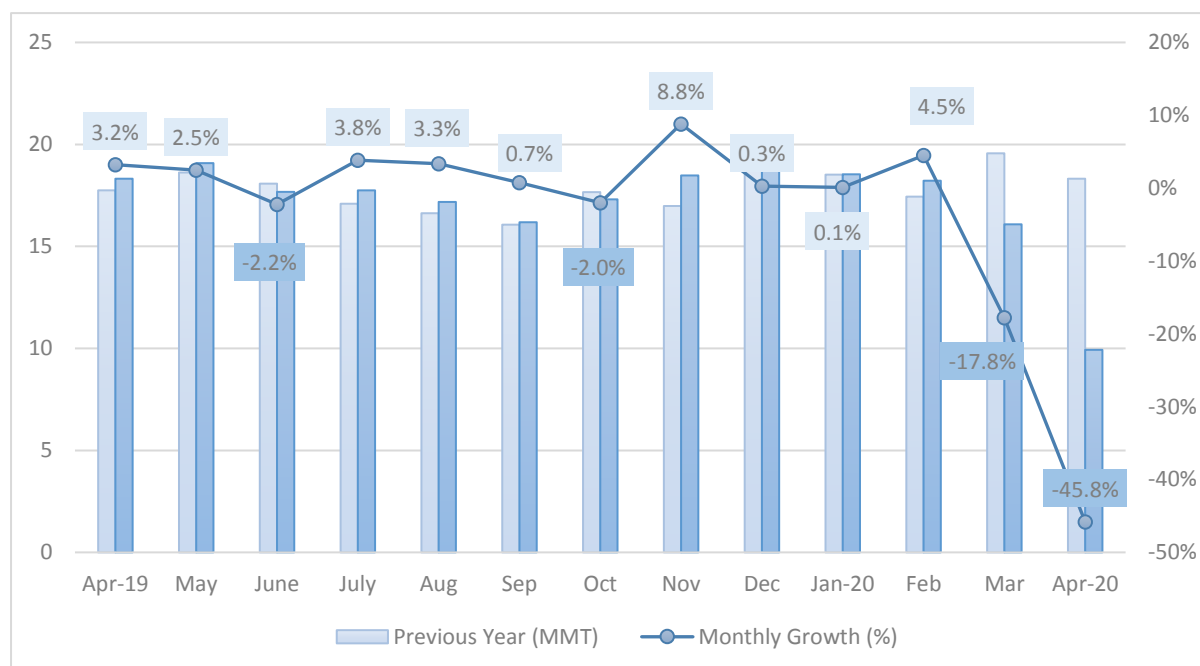
Product Type	Share %	Apr-2019	Apr-2020	Growth (%)	Products included
Sensitive Products	22.8	2155	2261	4.9	SKO & LPG
Major Decontrolled Products	59.1	12866	5871	-54.4	HSD, MS, Naphtha, Lubes, LDO, FO/LSHS, Bitumen & ATF
Minor Decontrolled Products	18.1	3299	1797	-45.5	Petcoke & other minor products
Total	100	18320	9929	-45.8	

### All Products:

India’s petroleum products consumption in the month of April 2020 registered an overall de-growth of -45.8% mainly due to measures taken to prevent the spread of COVID-19 in the month of April 2020. Consumption of petroleum products during April 2020 was 9.9 MMT as against 18.3 MMT in April last year. The month of April 2020 saw growth in consumption of only one product LPG 12.2% while all other products recorded degrowth.

Figure-1 gives a comparison of monthly POL consumption (MMT) and growth (%) since April 2019.

**Figure-1: Comparison of monthly POL consumption (MMT) and growth (%) since April 2019**



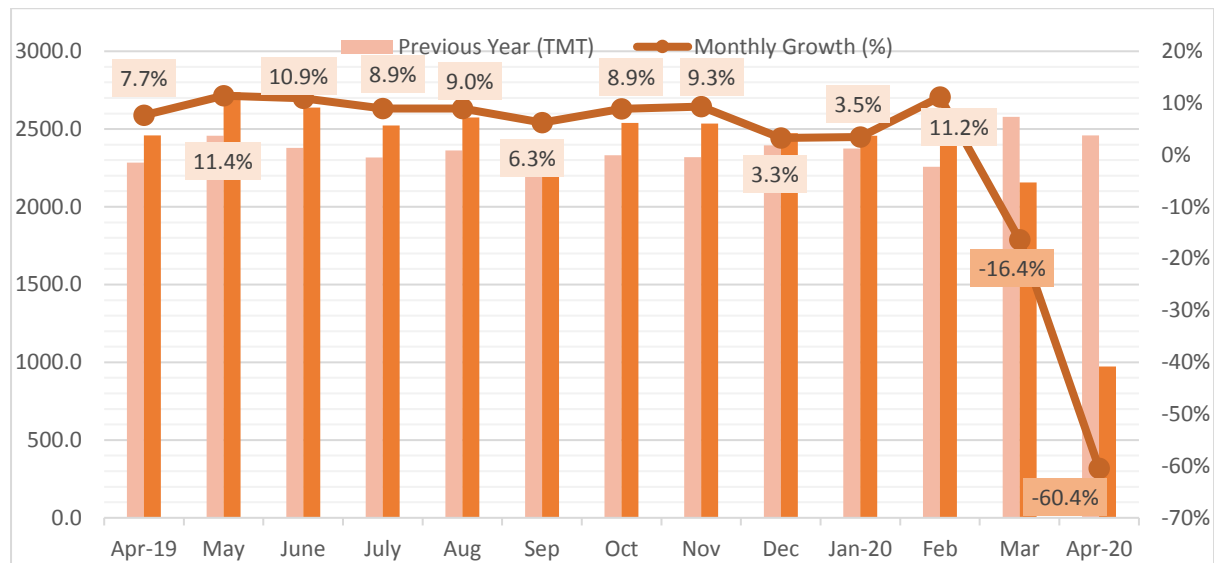
PPAC analyzes the sales recorded by the Industry and domestic sales by SEZ units based on available data. Data on direct private imports is received from DGCIIS, which is added to the final sales reported by oil companies and domestic sales by SEZ units, for estimation of consumption figures, are available up to December 2019. Private imports data for January 2020 to April 2020 are projected based on January 2019 to December 2019 actual data.

### Petrol/Motor Spirit (MS):

MS consumption recorded its second consecutive dip after a steady growth for thirty months in a row, registering a de-growth of -60.4% in the month of April 2020 with sales of 0.9 MMT as compared to 2.4 MMT in April 2019. The measures necessitated to contain the effect of COVID-19 throughout the month of April 2020 saw consumption supported by only agricultural and essential services related activities. Work from home and online classes restricted traffic movement although some offices did open in the last ten days of April 2020 with minimum manpower

Figure-2 gives month-wise MS consumption volume (TMT) and month-on-month growth (%) since April 2019.

Figure-2: Month wise MS consumption (TMT) and growth (%) since April 2019



**High Speed Diesel (HSD):**

HSD consumption during the month recorded a de-growth of -55.6%, with a sales of 3.2 MMT in April 2020 as compared to 7.3 MMT in April 2019. Factors affecting diesel consumption during the current month:

- a. Industries faced the issue of man-power crunch, raw material shortages due to supply chain disruptions, stress on financial sector due to bad debts and subdued demand. The consumption during the month has stayed confined to agricultural and essential services related activities. The Industries like pharmaceuticals, fertilizers, health care, and coal mining and power were functional, whereas others remained either partially or fully restricted also resulting in total stoppage of cargo movement and trucks on the roads.

Figure-3 gives month-wise HSD consumption volume (TMT) and month-on-month growth (%) since April 2019.

Figure-3: Month-wise HSD consumption (TMT) and growth (%) since April 2019

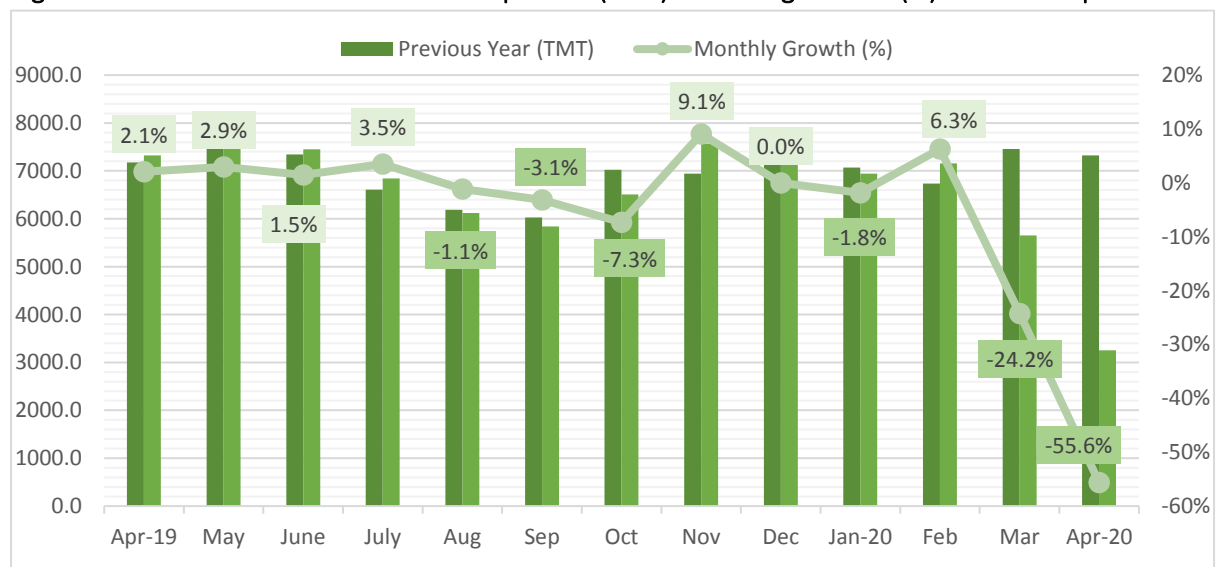
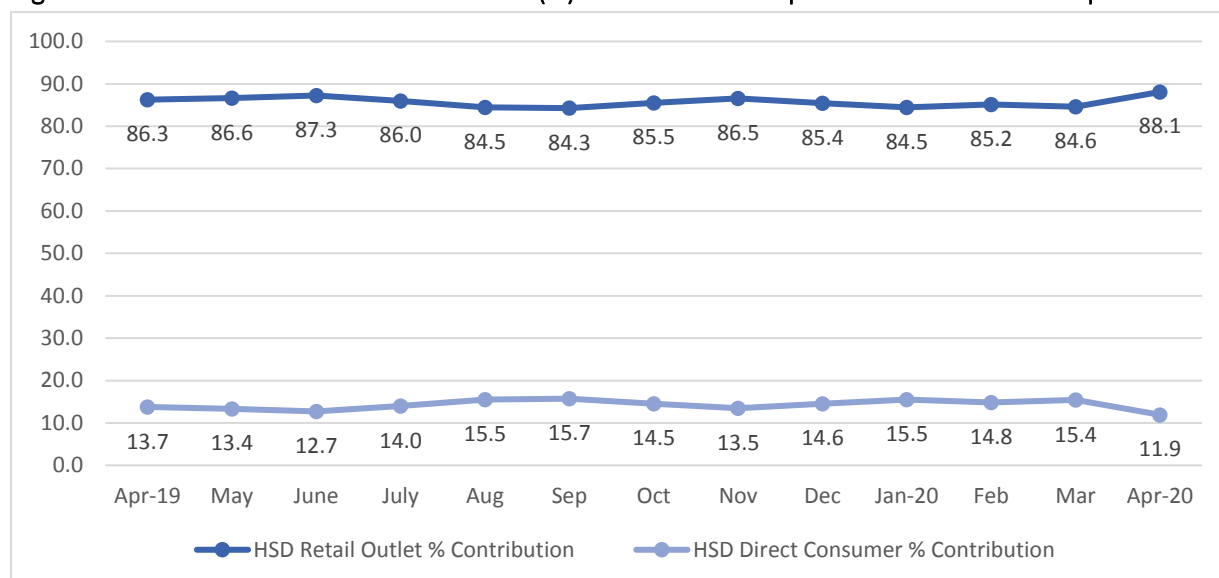


Figure-4 gives a comparison of month-wise percentage of HSD consumption through retail outlets and direct consumer business since April 2019.

**Figure-4: Share of Retail and Direct business (%) in Diesel consumption month-wise since April 2019**



#### b. Port Traffic:

The traffic handled at major ports in India recorded a de-growth of -21.1% and together handled 47.4 MMT of cargo during April 2020 as against 60.1 MMT handled during the corresponding period of the previous year. All the major ports recorded a dip in cargo handled during the month of April 2020 except the port of Mormugao (Goa), where the positive growth of 5.4% is on account of a lift on coal import ban by Pollution Control Board.

During the month, growth was registered only in fertilizer raw 75.3% while degrowth was observed in Petroleum Oil & lubricants (POL) -14.1%, other liquids -35.6%, iron ore -11.3%, fertilizer finished -14.6%, thermal & steam coal -30.5%, coking & others coal -17.1% and containers -33.8% and miscellaneous cargo -5.5%. Commodity-wise, the percentage share of POL was maximum i.e. 34.4%, followed by container 17.5%, thermal & steam coal 16.5%, other miscellaneous cargo 10.3%, coking & other coal 9.0%, iron ore & pellets 7.1%, other liquids 3.2%, raw fertilizer 1.0% and fertilizer finished 0.8%.

Table-2 below gives the port-wise performance during the month of April 2020

Table-2: Traffic handled at major ports in April 2020

Ports	April 2019	April 2020	Growth (%)
KOLKATA & HALDIA	4968	3652	-26.5
PARADIP	9552	8564	-10.3
VISAKHAPATNAM	5690	5009	-12.0
KAMARAJAR (ENNORE)	2977	2083	-30.0
CHENNAI	3948	2441	-38.2
V.O. CHIDAMBARANAR	3084	2297	-25.5
COCHIN	2828	1874	-33.7
NEW MANGALORE	3267	3225	-1.3
MORMUGAO	1479	1559	5.4
MUMBAI	5001	4088	-18.3
JNPT	5991	3956	-34.0
DEENDAYAL	11301	8674	-23.2
<b>TOTAL:</b>	<b>60086</b>	<b>47422</b>	<b>-21.1</b>

Source:ipa.nic.in

**c. Power situation:**

The position of power supply for the month of April 2020 is given in Table-3. As per the data reported, power deficit position has increased to -0.5% in the month of April 2020 from -0.4% in the month of April 2019. The deficit was mainly in the state Uttar Pradesh and UT of Jammu & Kashmir and Ladakh. Also there has been a fall of 22% in requirement of power from 110,231 MU in April 2019 to 85,608 MU in April 2020.

Table-3: Power supplied and deficit: Region-wise position for April 2020

Region	Apr-2019			Apr-2020		
	Requirement (MU)	Supplied (MU)	Deficit %	Requirement (MU)	Supplied (MU)	Deficit %
North	30,094	29,786	-1.0%	22,262	21,888	-1.7%
West	34,875	34,868	0.0%	27,476	27,476	0.0%
South	31,111	31,109	0.0%	25,088	25,086	0.0%
East	12,851	12,850	0.0%	9,735	9,735	0.0%
North-East	1,300	1,228	-5.5%	1,048	979	-6.5%
<b>Total</b>	<b>110,231</b>	<b>109,842</b>	<b>-0.4%</b>	<b>85,608</b>	<b>85,164</b>	<b>-0.5%</b>

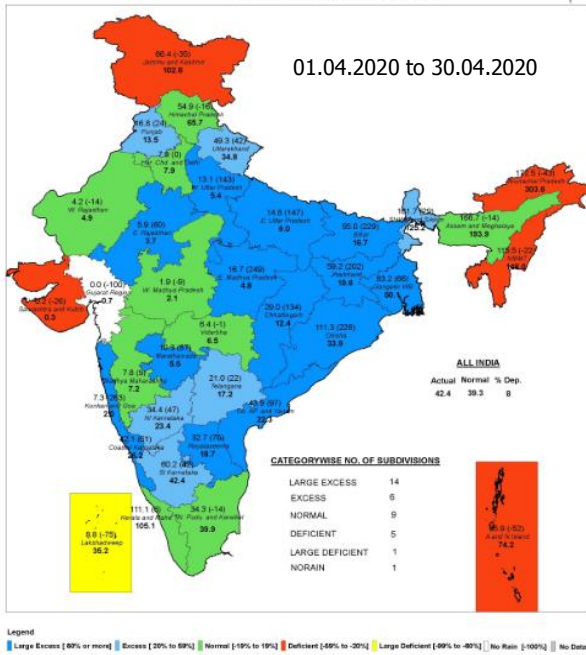
Source: Central Electricity Authority (CEA)

**d. Seasonal rainfall scenario:**

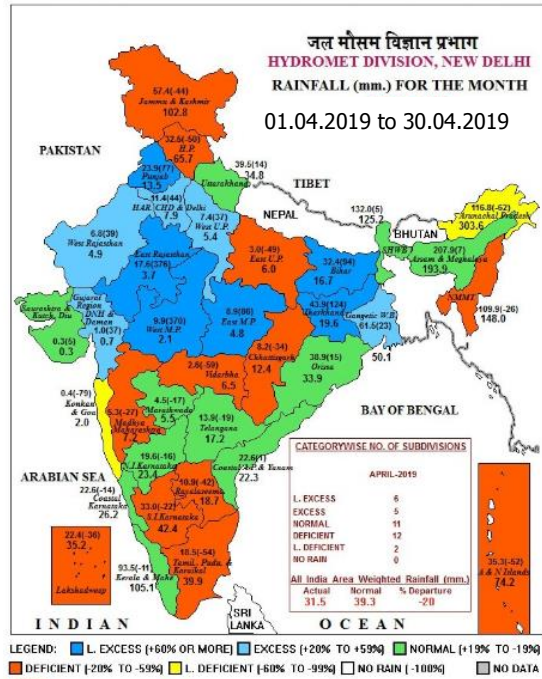
The rainfall in the country during April 2020 was almost 8% above normal precipitation. A rainfall of 42.4 mm was recorded in the month of April 2020 as against a normal reading of 39.3 mm. Out of total 36 sub-divisions, 29 divisions received from normal to large excess rainfall whereas 7 divisions received deficient to large deficient rainfall. Requirement of diesel by agriculture sector may have contracted due to better rainfall during the month.



**SUBDIVISION RAINFALL MAP**  
Period : 01-04-2020 To 30-04-2020 (REALTIME)



जल मौसम विज्ञान प्रभाग  
HYDROMET DIVISION, NEW DELHI  
RAINFALL (mm.) FOR THE MONTH  
01.04.2019 to 30.04.2019



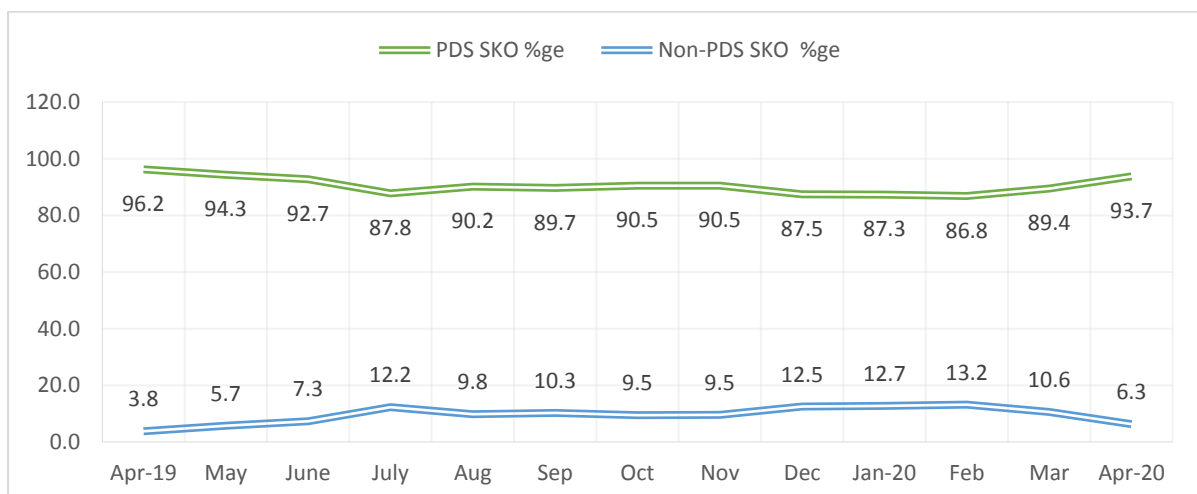
Source: India Meteorological Department (IMD)

**Kerosene:**

Kerosene consumption registered a de-growth of -49.3% during the month of April 2020 as compared to April 2019. All UTs except the UT of J&K and Ladakh have been declared kerosene free. While the states Andhra Pradesh, Delhi, Haryana and Punjab have been declared kerosene free. The month of April 2020 saw nil upliftment by the UT of Ladakh and states of Sikkim & Uttarakhand. States like Gujarat, Bihar, Uttar Pradesh and Maharashtra have also voluntarily surrendered a certain quantity of PDS SKO allocation.

Figure-5 gives a comparison of kerosene sales in public distribution system vis-à-vis Non-PDS system since April 2019.

Figure-5: Month-wise PDS & Non PDS SKO consumption in share (%) since April 2019

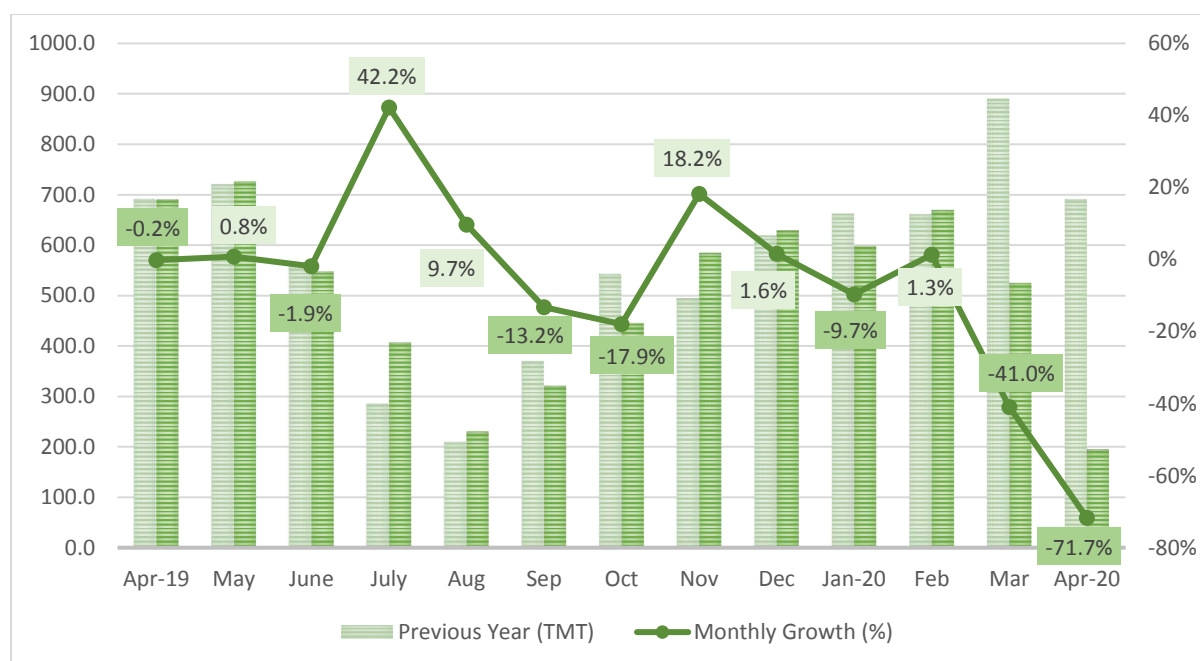


## Bitumen:

Bitumen consumption during April 2020 recorded a de-growth of -71.7% as compared to April 2019 mainly due to maintenance activities that were carried out during the month. Road construction activities at a very slow pace were observed in rural areas.

Figure-6 gives the month wise bitumen consumption and growth since April 2019.

**Figure-6: Month-wise Bitumen consumption (TMT) and growth (%) since April 2019**



## LPG:

Total LPG consumption recorded a growth of 12.2% in April 2020 as compared to April 2019 mainly due to government scheme of free refill of cylinders for poor households. Also people staying at home during the lockdown and smooth supply, increased domestic consumption of LPG cooking gas during the month.

Last year during April 2019 a growth of 2.0% was observed. During April 2020, out of the five regions, Northern region had the highest share of 30.9% in total PSU LPG sales followed by Southern region at 25.9%, Western region at 20.2%, Eastern region at 20.0% and North Eastern region at 3.0%.

**PSU LPG Packed Domestic** category recorded a growth of 25.4% during April 2020. Last year during April 2019 a growth of only 2.2% was observed. During April 2020, 3.22 lakh new connections and 2.26 lakh DBCs were released against a historical of 5.75 lakh new connections and 3.12 lakh DBCs. During April 2020, the region-wise share of PSU LPG sales in packed Domestic category was highest in Northern region (31.2%) followed by Southern region (25.6%), Eastern region (20.2%), Western region (19.9%) and North-Eastern region (3.0%). During April 2020, the five states with the highest PSU LPG-Packed domestic sales share were Uttar Pradesh (14.8%), Maharashtra (9.9%), West Bengal (8.6%), Tamil Nadu (8.2%) and Bihar

(6.7%). During April 2020, percentage share of LPG-Packed Domestic was 97.3% of total PSU LPG sales whereas it was 87.1% in April 2019.

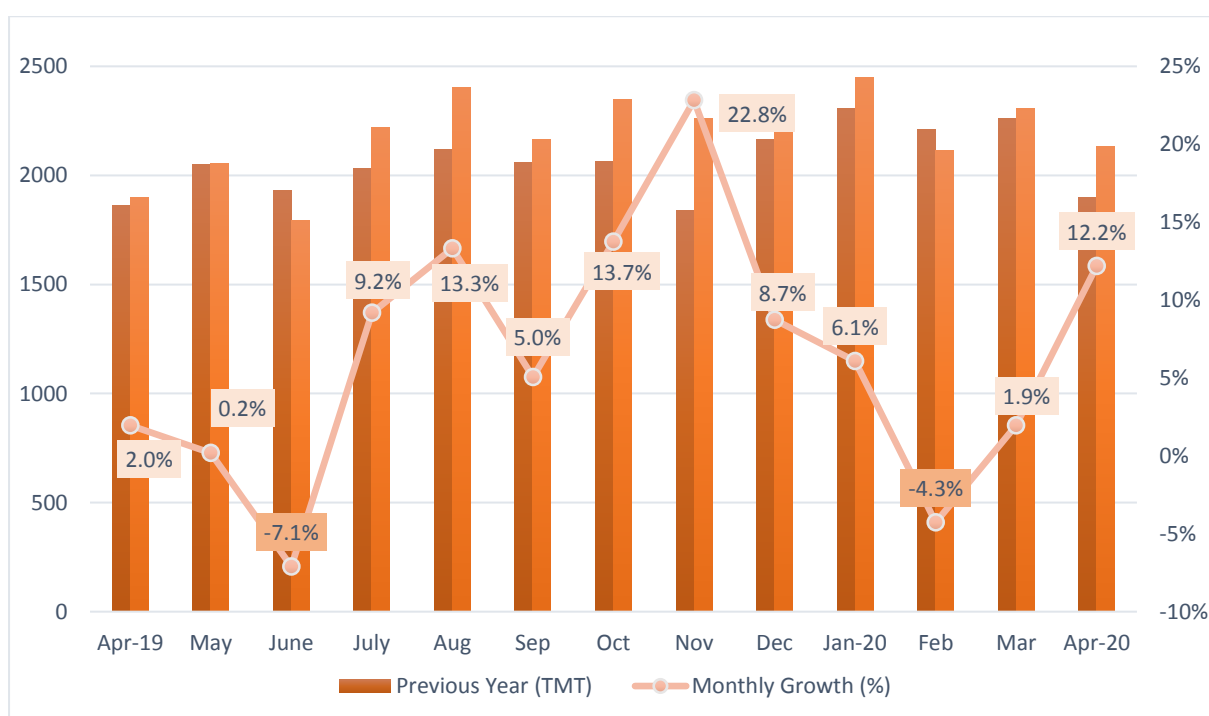
**PSU LPG Packed Non-Domestic** category recorded a de-growth of -83.9% in April 2020. Last year in the month of April 2019 a growth of 5.7% was observed. Share of PSU Packed Non-Domestic LPG sales in total PSU LPG Sales has decreased to 1.4% in April 2020 from 9.9% in April 2019. Region-wise share of PSU Packed Non-Domestic LPG sales was highest in Southern region (38.1%) followed by Western region (36.3%), Northern region (16.2%), Eastern region (8.3%) and North-Eastern region (1.0%) during April 2020.

**PSU LPG Bulk LPG** category has registered a de-growth of -72.6% during April 2020. There was a de-growth of -26.2% during April 2019. Percentage share of PSU Bulk LPG sales in total PSU LPG sales was 0.3% during April 2020 whereas it was 1.1% in April 2019. Region-wise share of PSU LPG sales in bulk category was highest in Southern region (48.5%) followed by Western region (31.0%), Northern region (9.1%), Eastern region (7.8%) and North-Eastern region (3.6%) during April 2020.

**PSU LPG Auto LPG** category registered a de-growth of -95.4% in April 2020. Last year in the month of April 2019 a de-growth of -3.2% was observed. The sales volume decrease was about 13.3 TMT in April 2020 as compared to April 2019. During April 2020, the percentage share of PSU Auto LPG sales was 0.03% of total PSU LPG sales whereas it was 0.74% in April 2019.

Figure-7 gives the month-wise LPG consumption and growth since April 2019.

**Figure-7: Month-wise LPG consumption (TMT) and growth (%) since April 2019**



### Naphtha:

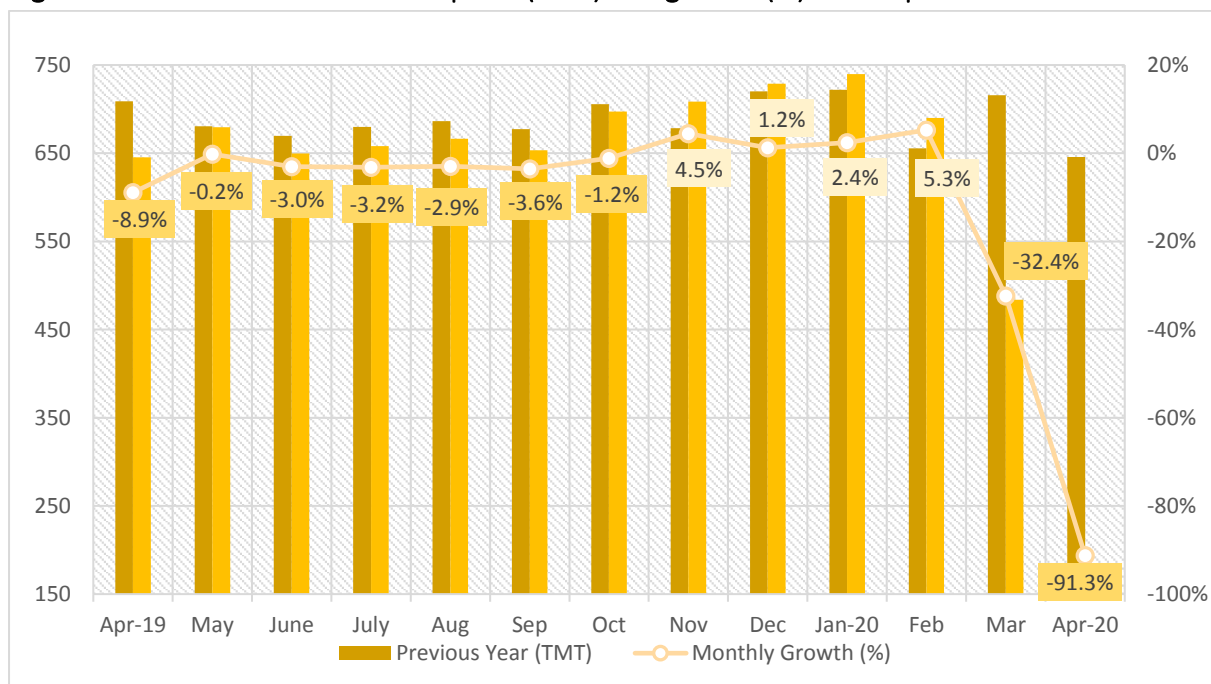
Naphtha consumption recorded a de-growth of -9.4% in April 2020 as compared to April 2019. Petrochemical industries remain the main consumers of naphtha in addition to minor consumers like fertilizer and power. These industries though functional during the month have taken a hit due to subdued demand in the market. Out of the total naphtha consumption of 859.4 TMT during the month, petrochemical sector consumed 715.6 TMT.

### ATF:

ATF consumption has shown a de-growth of -91.3% in the month of April 2020. During the month of April 2020, all flights were grounded except those operating for medical supplies and essential cargo movement. Certain flights were also pressed in service for special purpose duty of evacuation of stranded Indian nationals in other countries.

Figure-8 gives the month-wise ATF consumption and growth since April 2019.

Figure-8: Month-wise ATF consumption (TMT) and growth (%) since April 2019



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

FO/LSHS consumption registered a de-growth of -40.3% during April 2020 as compared to April 2019. Consumption of FO/LSHS is largely driven by General trade sector in addition to power, fertilizer, petrochemical, steel and others.

### **Petcoke:**

Petcoke consumption registered a de-growth of -49.6% in April 2020 as compared to April 2019. 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.

### **LDO:**

LDO consumption recorded a de-growth of -38.4% during April 2020 as compared to April 2019. LDO is extensively used in various types of furnaces. With functioning of only industries in essential services, consumption of LDO has shown de-growth.

\*\*\*\*\*

### Industry Consumption Trend Analysis 2020-21 (Provisional)

('000 MT)

Product	April			April		
	2019-20	2020-21	Growth (%)	2019-20	2020-21	Growth (%)
<b>(A) Sensitive Products</b>						
LPG	1900.3	2131.9	12.2	1900.3	2131.9	12.2
SKO	254.4	129.0	-49.3	254.4	129.0	-49.3
Sub Total	2155	2261	4.9	2155	2261	4.9
<b>(B) Major Decontrolled Product</b>						
HSD	7323.4	3249.8	-55.6	7323.4	3249.8	-55.6
MS	2459.1	972.9	-60.4	2459.1	972.9	-60.4
Naphtha	948.9	859.4	-9.4	948.9	859.4	-9.4
ATF	645.7	56.4	-91.3	645.7	56.4	-91.3
Bitumen	690.5	195.7	-71.7	690.5	195.7	-71.7
FO/LSHS	498.5	297.4	-40.3	498.5	297.4	-40.3
Lubes+Greases	255.0	211.8	-16.9	255.0	211.8	-16.9
LDO	45.0	27.7	-38.4	45.0	27.7	-38.4
Sub Total	12866	5871	-54.4	12866	5871	-54.4
Sub – Total (A + B)	15021	8132	-45.9	15021	8132	-45.9
<b>(C) Other Minor Decontrolled Products</b>						
Pet.Coke	2253.6	1134.9	-49.6	2253.6	1134.9	-49.6
Others*	1045.1	662.5	-36.6	1045.1	662.5	-36.6
Sub Total	3299	1797	-45.5	3299	1797	-45.5
Total	18320	9929	-45.8	18320	9929	-45.8

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