



**Petroleum Planning & Analysis Cell**  
Ministry of Petroleum & Natural Gas, Government of India

April 2021

# Industry POL and NG Consumption Report





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## Highlights

The month of April 2021 saw a resurgence in cases during the second wave of COVID. Lockdowns and local restrictions had to be imposed by State/UT governments to contain the pandemic. Vaccinations continued to be rolled out across the States during the month.

**The summary of product-wise POL consumption pattern during the month of April 2021 is as follows.**

1. The consumption of petroleum products in April 2021 with a volume of 17.0 MMT recorded a growth of 81.6% over volume of 9.4 MMT in April 2020. The month of April in 2020 had a low base effect as it had seen a complete lockdown across the country with a view to contain the Covid-19 pandemic. The products which registered a growth in the month of April 2021 were LPG 0.1%, Diesel (HSD) 105.3%, Petrol (MS) 145.2%, Naphtha 60.7%, Aviation Turbine Fuel (ATF) 641.3%, Bitumen 252.7%, Furnace Oil & Low Sulphur Heavy Stock (FO/LSHS) 85.3%, Lubes & Greases 49.6%, Light Diesel Oil (LDO) 233.5%, Pet coke 109.4% and products categorised under "Others" category 45.5%. Kerosene (SKO) recorded a de-growth of -18.4% during the current month as compared to April 2020.
2. MS (Petrol) consumption during the month of April 2021 with a volume of 2.4 MMT registered a growth of 145.2% over the volume of 1.0 MMT in April 2020. High Growth rate during the month as compared to the corresponding month of the previous year can be attributed to low base effect.
3. HSD (Diesel) consumption during the month of April 2021 with a volume of 6.7 MMT registered a growth of 105.3% over the volume of 3.3 MMT in April 2020. HSD consumption during the month of April 2021 could recover to 92.5% of volume in March 2021. While April 2020 was complete lockdown, the month of April 2021 saw local restrictive measures adopted by a few states due to pandemic. Rainfall during the month was 21% below the normal. A growth of 29.5% was recorded in port traffic during April 2021 as compared to April 2020.
4. LPG consumption recorded a meagre growth of 0.1% during the month of April 2021 as compared to April 2020. LPG consumption for the period of April 2021 has registered a 93.5% of volume in the month of March 2021.
5. ATF consumption during April 2021 registered a volume of 0.4 MMT against a volume of 0.06 MMT during the month of April 2020. International air travel remained restricted and domestic travel also slowed down during the month.
6. Bitumen consumption during April 2021 registered a growth of 252.7% as compared to volume in April 2020. The consumption during April 2021 was at 72.8% of the consumption in the previous month of March 2021. Various road projects were executed in Eastern states, although availability of labour affected many projects.
7. Kerosene (SKO) consumption registered a de-growth of -18.4% in April 2021 as compared to April 2020. Ten States & all Union Territories (except UTs of Jammu & Kashmir and Ladakh) have gone kerosene free while the states of Goa, Sikkim, Uttarakhand and the UTs of Ladakh & Lakshadweep registered nil sales of PDS SKO during the month.

This report analyses the trend of consumption of petroleum products in the country during the month of April 2021. Data on product-wise monthly consumption of petroleum products for April 2021 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 2021 is given in Table-1.

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

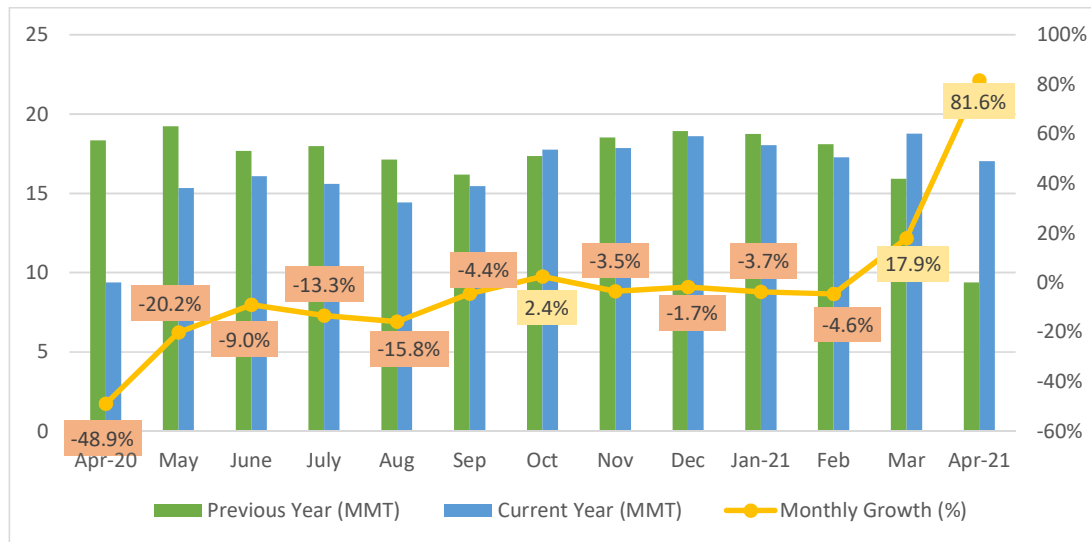
Product Type	Share %	April -2020	April - 2021	Growth (%)	Products included
Sensitive Products	13.0	2241	2219	-1.0	SKO & LPG
Major Decontrolled Products	72.3	5751	12295	113.8	HSD, MS, Naphtha, Lubes, LDO, FO/LSHS, Bitumen & ATF
Minor Decontrolled Products	14.7	1377	2499	81.5	Petcoke & other minor products
<b>Total</b>	<b>100</b>	<b>9369</b>	<b>17013</b>	<b>81.6</b>	

### All Products:

Overall consumption of all petroleum products in April 2021 with a volume of 17.0 MMT recorded a growth of 81.6% over volume of 9.4 MMT in April 2020. The products which registered a growth in the month of April 2021 were LPG 0.1%, Diesel (HSD) 105.3%, Petrol (MS) 145.2%, Naphtha 60.7%, Aviation Turbine Fuel (ATF) 641.3%, Bitumen 252.7%, Furnace Oil & Low Sulphur Heavy Stock (FO/LSHS) 85.3%, Lubes & Greases 49.6%, Light Diesel Oil (LDO) 233.5%, Pet coke 109.4% and products categorised under “Others” category 45.5%. Kerosene (SKO) recorded a de-growth of -18.4% during the current month as compared to April 2020.

Figure-1 gives a comparison of monthly POL consumption (MMT) and growth (%) since April 2020.

**Figure-1: Comparison of monthly POL consumption (MMT) and growth (%) since April 2020**



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 DGCIS, 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 June 2020. Private imports data for July 2020 to April 2021 are projected based on July 2019 to June 2020 actual data.

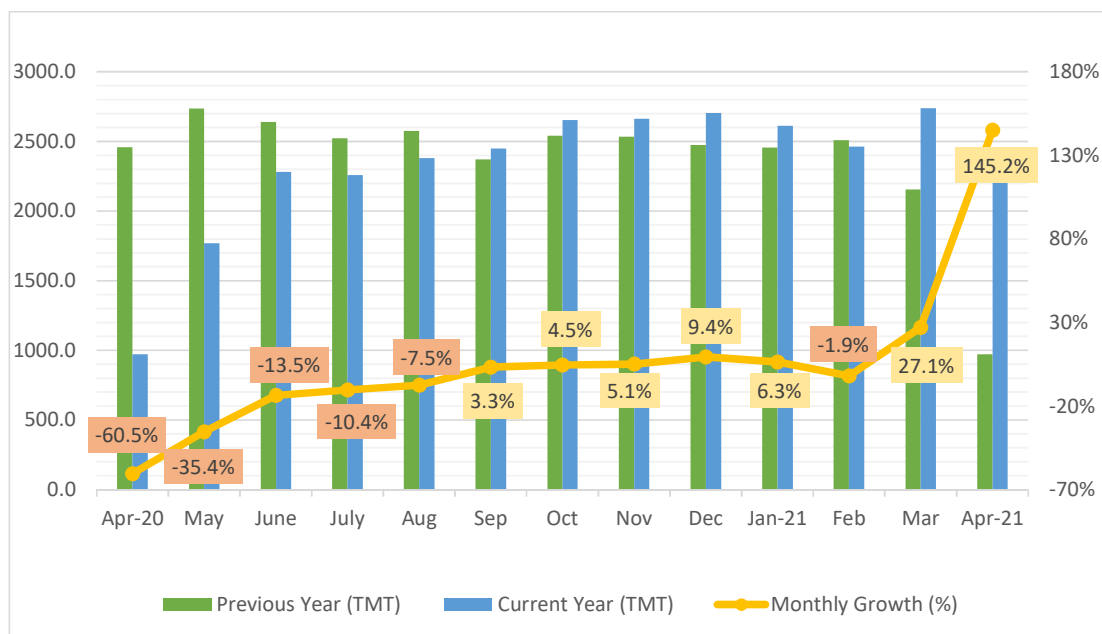
**Petrol/Motor Spirit (MS):**

MS (Petrol) consumption during the month of April 2021 with a volume of 2.4 MMT recorded a growth of 145.2% over the volume of 1.0 MMT in April 2020. Major factors contributing to MS consumption during the month are as follows:

- Low historical base in the month of April 2020.
- COVID second wave and accompanying local restrictions adopted by states to contain the pandemic had also impact on consumption.

Figure-2 gives month-wise MS consumption volume (TMT) and month-on-month growth (%) since April 2020.

**Figure-2: Month wise MS consumption (TMT) and growth (%) since April 2020**



**Other Factors impacting consumption of MS:**

**Passenger Vehicle Sales:**

As per SIAM data the passenger vehicle sales during the month of April 2021 clocked a sales of 2.6 Lakh vehicles as compared to 2.9 lakh vehicles sold in the previous month of March 2021. Vehicle sales during last year of April 2020 was nil due to complete lock down.

**Two Wheeler Sales:**

A total of 9.9 Lakh two/three-wheeler sales was recorded during the month of April 2021. The vehicle sales during last year of April 2020 was nil due to complete lock down.

**High Speed Diesel (HSD):**

HSD (Diesel) consumption during the month of April 2021 with a volume of 6.7 MMT recorded a growth of 105.3% over the volume of 3.3 MMT in April 2020.

Factors affecting diesel consumption during the current month:

- Low historical base in the month of April 2020.
- Local restrictions imposed across states with midnight curfew and weekend lockdown affected inter-state, inter-district travel and transportation of goods.

- Sectoral analysis of direct consumer segment indicated that consumption of diesel during the April 2021 in manufacturing activities reached 94.5% of its level in the previous month of March 2021.

Manufacturing PMI for the month of April rose to 55.5 as compared to 55.4 in the month of March 2021 indicating an expansion on account of demand for exports. Services PMI for the month of April 2021 marginally shrunk to 54.0 from 54.6 in the month of March 2021 indicating an easing in growth.

Figure-3 gives month-wise HSD consumption volume (TMT) and month-on-month growth (%) since April 2020.

**Figure-3: Month-wise HSD consumption (TMT) and growth (%) since April 2020**

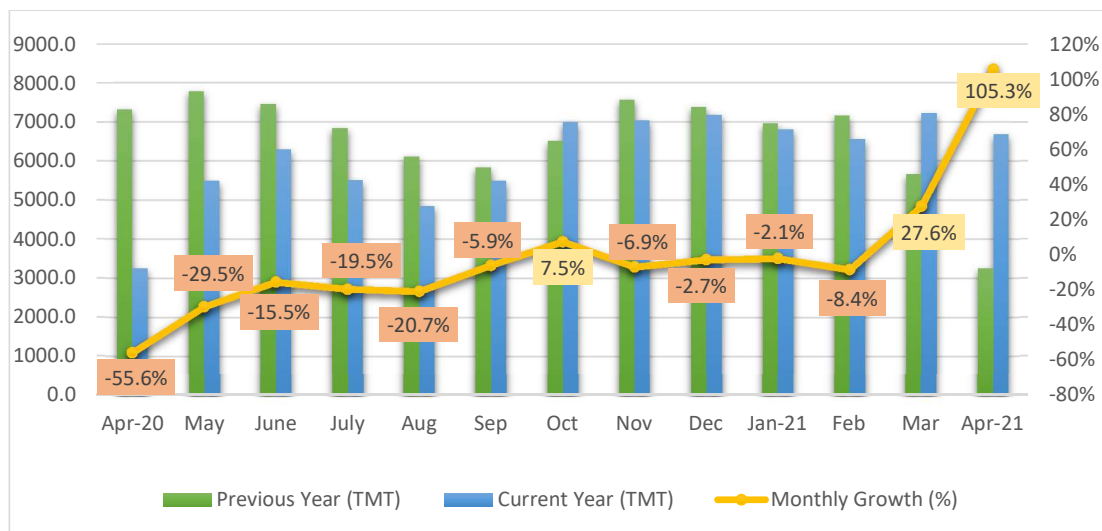
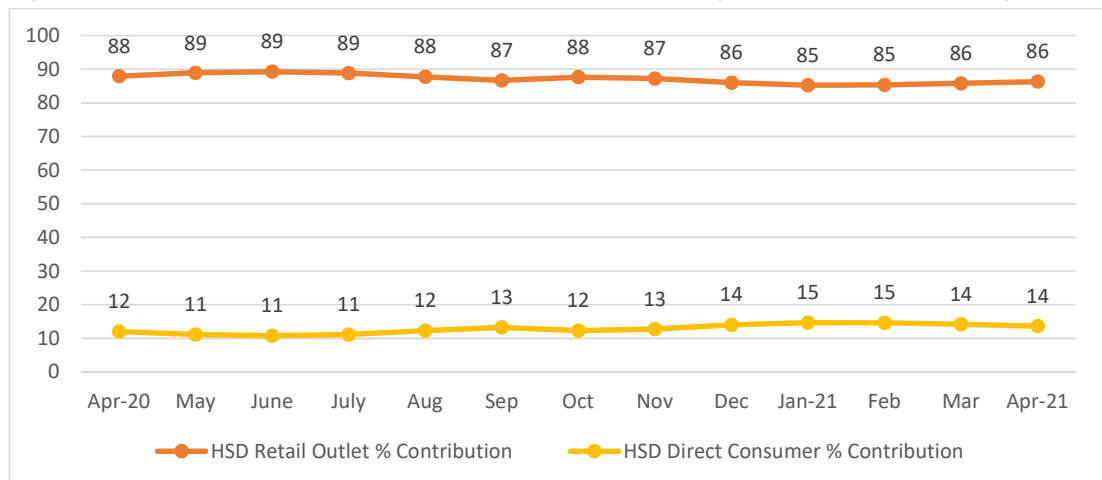


Figure-4 gives a comparison of month-wise percentage of HSD consumption through retail outlets and direct consumer business since April 2020.

**Figure-4: Share of Retail & Direct business (%) in Diesel consumption month-wise since April 2020**



## Other Factors impacting consumption of HSD:

### *Commercial Vehicle*

Based on data reported by individual companies in the month of April 2021, the sales of commercial vehicles in the month of April 2021 was lower as compared to March 2021. The sale in April last year was almost nil owing to lockdown across the country.

### *Tractor Sale:*

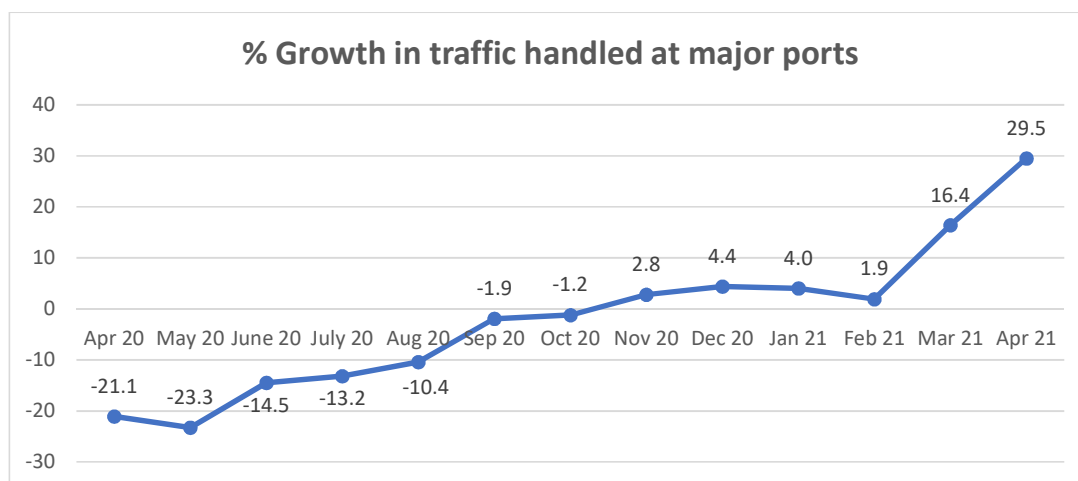
Similarly, tractor sales as reported by major individual companies in the month of April 2021 has reached to 87% of the sale in the previous month of March 2021. The sale of tractors in the month of April last year was very low owing to lockdown across the country.

### *Port Traffic:*

The traffic handled at major ports in India recorded a growth of 29.5% and together handled 61.5 MMT of cargo during April 2021 as against 47.5 MMT handled during the corresponding period of the previous year. There has been a growth in traffic handled at major ports for sixth consecutive month.

Figure-5 gives a trend in % growth of traffic handled at major ports since April 2020.

**Figure-5: Growth percentage of traffic handled at major ports since April 2020.**



Growth was observed in cargo handled during the month of April 2021 in the port of Kolkata & Haldia 30.2%, Paradip 30.9%, Visakhapatnam 11.2%, Kamarajar (Ennore) 53.5%, Chennai 60.2%, V.O Chidambaranar (Tuticorin) 42.1%, Cochin 38.3%, Mormugao (Goa) 51.8%, Mumbai 14.4%, JNPT 60.0% and Deendayal (Kandla) 20.5%.



During the month of April 2021, growth was registered in Petroleum Oil & lubricants (POL) 6.7%, other liquids 49.1%, iron ore 96.5%, fertilizer finished 2.9%, fertilizer raw 49.1%, thermal & steam coal 8.6%, coking & others coal 10.4% and containers 69.8% and miscellaneous cargo 35.8%. Commodity-wise, the percentage share of POL was maximum i.e. 28.3%, followed by container 22.9%, thermal & steam coal 13.8%, other miscellaneous cargo 11.1%, iron ore & pellets 10.6%, coking & other coal 7.7%, other liquids 3.7%, raw fertilizer 1.1% and fertilizer finished 0.6%.

**Table-2: Traffic handled at major ports in April 2021**

Ports	April 2020	April 2021	Growth (%)
Kolkata & Haldia	3,741	4,871	30.2
Paradip	8,564	11,207	30.9
Visakhapatnam	5,009	5,570	11.2
Kamarajar (Ennore)	2,083	3,198	53.5
Chennai	2,441	3,910	60.2
V.O. Chidambaranar	2,297	3,263	42.1
Cochin	1,874	2,591	38.3
New Mangalore	3,225	3,101	-3.8
Mormugao	1,557	2,363	51.8
Mumbai	4,088	4,677	14.4
JNPT	3,953	6,325	60.0
Deendayal	8,674	10,452	20.5
<b>Total:</b>	<b>47,506</b>	<b>61,528</b>	<b>29.5</b>

Source: ipa.nic.in

**Power situation:**

The position of power supply for the month of April 2021 is given in Table-3. As per the data reported, power deficit position had reduced to -0.3% in the month of April 2021 from -0.5% in the month of April 2020. The deficit was mainly in the UT of J&K and Ladakh and the state of Uttar Pradesh. Also the requirement of power in April 2021 at 118,437 MU has recorded a growth of 38.3% over requirement of power at 85,608 MU in the month of April 2020.

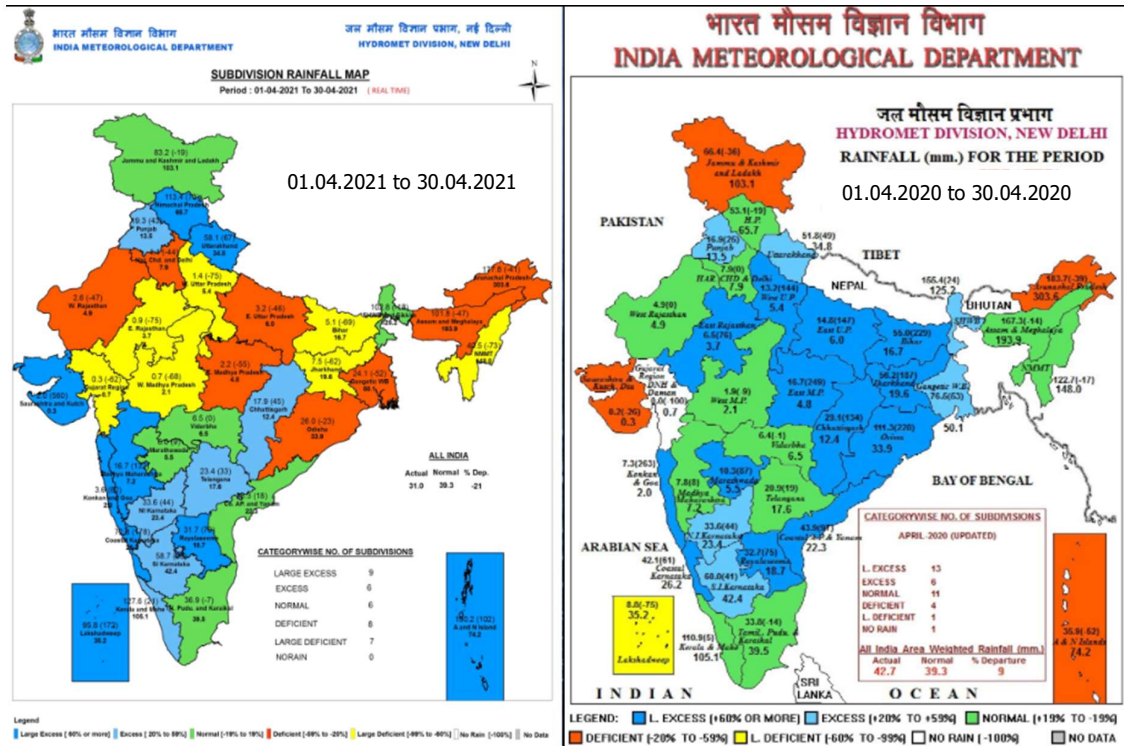
**Table-3: Power supplied and deficit: Region-wise position for April 2021**

Region	April 2021		
	Requirement	Supplied (MU)	Deficit %
North	22,262	21,888	-1.7%
West	27,476	27,476	0.0%
South	25,088	25,086	0.0%
East	9,735	9,735	0.0%
North-East	1,048	979	-6.6%
<b>Total</b>	<b>85,608</b>	<b>85,164</b>	<b>-0.5%</b>

Source: Central Electricity Authority (CEA)

**Seasonal rainfall scenario:**

The rainfall in the country during April 2021 was almost 21% below normal precipitation. A rainfall of 31.0 mm was recorded in the month of April 2021 as against a normal reading of 39.3 mm. Out of total 36 sub divisions, 21 divisions received from normal to large excess rainfall whereas 15 divisions received deficient to no rainfall.



Source: India Meteorological Department (IMD)

**Kerosene:**

Kerosene consumption registered a de-growth of -18.4% during the month of April 2021 as compared to April 2020. There are a total ten number of states/UTs who have voluntarily surrendered the PDS kerosene quota. All UTs except the UT of J&K and Ladakh and the states of Andhra Pradesh, Delhi, Haryana, Punjab, Uttar Pradesh and Rajasthan have been declared kerosene free. The states of Goa, Sikkim, Uttrakhand and the UTs of Ladakh & Lakshadweep registered nil sales of PDS SKO during the month.

Figure-5 gives a comparison of SKO sales in PDS system vis-à-vis Non-PDS system since April 2020.

**Figure-5: Month-wise PDS & Non PDS SKO consumption in share (%) since April 2020**

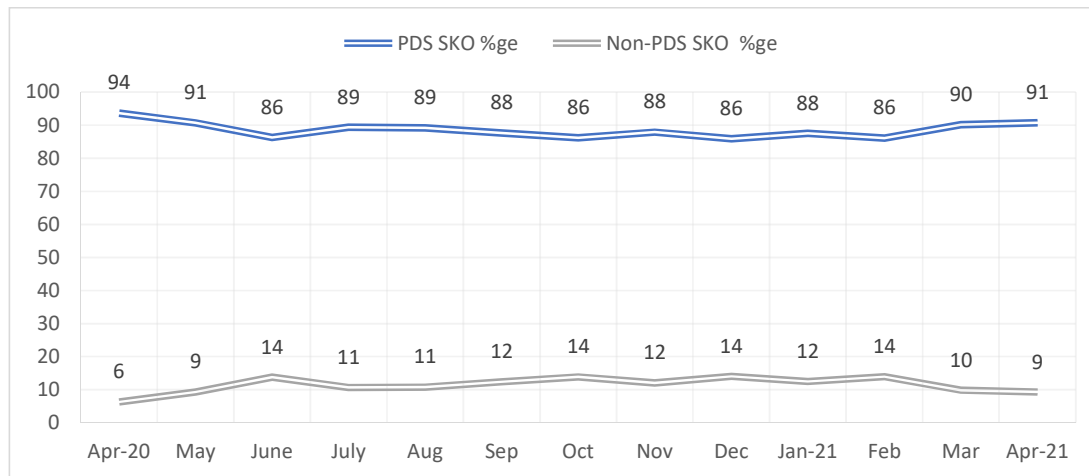
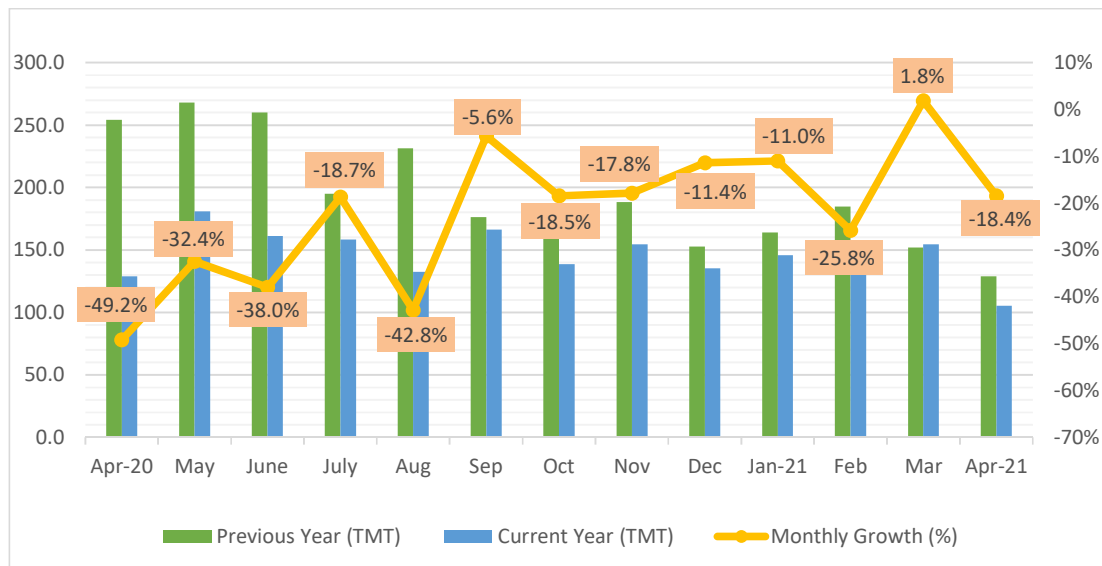


Figure-6 gives the month wise Kerosene consumption and growth since April 2020.

**Figure-6: Month-wise Kerosene consumption (TMT) and growth (%) since April 2020**

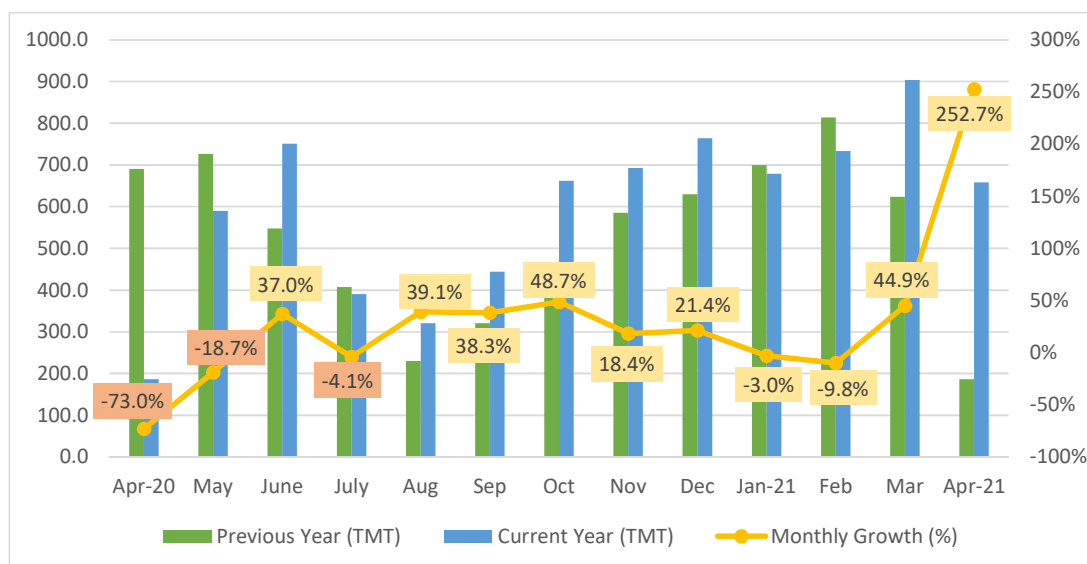


**Bitumen:**

Bitumen consumption during April 2021 recorded a growth of 252.7% as compared to volume in April 2020. Infrastructure work is progressing but with the operational difficulties due to non-availability of labour in view of the pandemic situation.

Figure-7 gives the month wise bitumen consumption and growth since April 2020.

**Figure-7: Month-wise Bitumen consumption (TMT) and growth (%) since April 2020**



### LPG:

Total LPG consumption recorded a growth of 0.1% during April 2021. Last year during April 2020 a growth of 11.1% was observed. During April 2021, out of the five regions, Northern region had the highest share of 31.7% in total PSU LPG sales followed by Southern region at 27.8%, Western region at 20.9%, Eastern region at 16.6% and North Eastern region at 3.0%.

**PSU LPG Packed Domestic** category recorded a de-growth of -7.2% during April 2021. Last year during April 2020 a growth of 25.3% was observed. During April 2021, 4.11 lakh new connections and 3.52 lakh DBCs were released against a historical of 3.22 lakh new connections and 2.26 lakh DBCs. During April 2021, the region-wise share of PSU LPG sales in packed Domestic category was highest in Northern region (32.7%) followed by Southern region (26.3%), Western region (20.5%), Eastern region (17.3%) and North-Eastern region (3.2%). During April 2021, the five states with the highest PSU LPG-Packed domestic sales share were Uttar Pradesh (14.6%), Maharashtra (11.0%), Tamil Nadu (7.8%), West Bengal (7.4%) and Karnataka (6.3%). During April 2021, percentage share of LPG-Packed Domestic was 91.0% of total PSU LPG sales whereas it was 98.2% in April 2020.

**PSU LPG Packed Non-Domestic** category recorded a growth of 370.1% in April 2021. Last year in the month of April 2020 a de-growth of -83.8% was observed. Share of PSU Packed Non-Domestic LPG sales in total PSU LPG Sales has increased to 6.8% from 1.4% in April 2020. Region-wise share of PSU Packed Non-Domestic LPG sales was highest in Southern region (43.5%) followed by Western region (24.8%), Northern region (23.0%), Eastern region (7.4%) and North-Eastern region (1.4%) during April 2021.

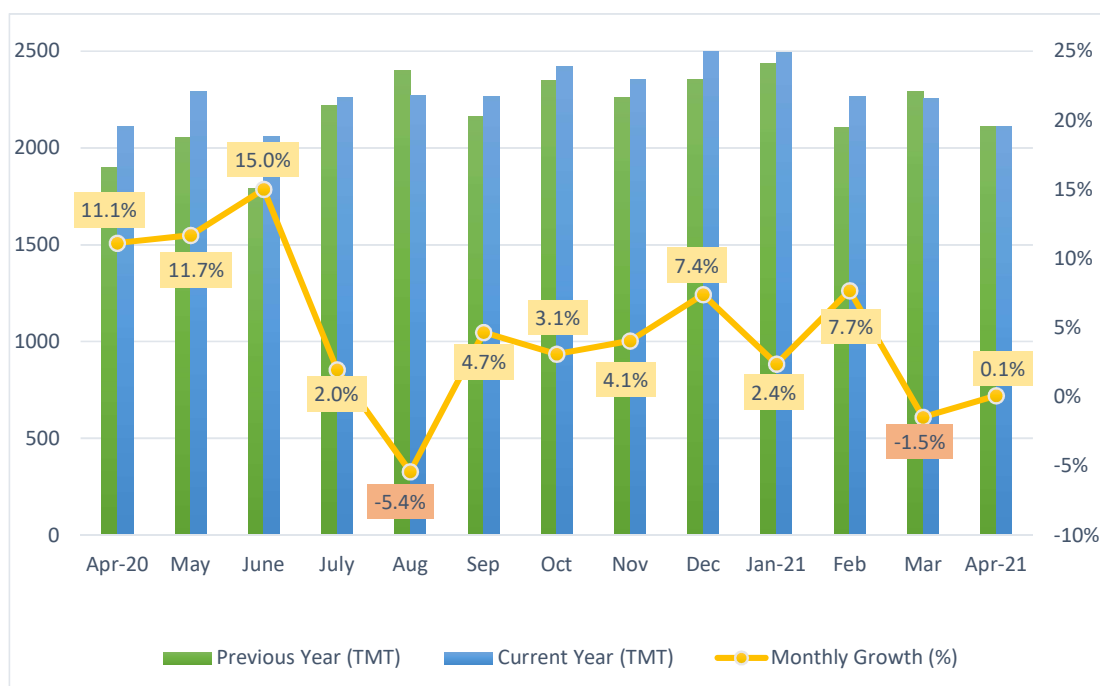
**PSU Bulk LPG** category registered a growth of 331.6% during April 2021. There was a de-growth of -72.9% during April 2020. Percentage share of PSU Bulk LPG sales in total PSU LPG sales was 1.2% during April 2021 whereas it was 0.3% in April 2020. Region-wise share of PSU LPG sales in bulk category was highest in Southern region (42.4%) followed by

Western region (32.7%), Eastern region (16.0%), Northern region (7.9%) and North-Eastern region (1.1%) during April 2021.

**PSU Auto LPG** category registered a growth of 1351.9% in April 2021. Last year in the month of April 2020 a de-growth of -95.4% was observed. The sales volume increase was about 8.7 TMT in April 2021 as compared to April 2020. During April 2021, the percentage share of PSU Auto LPG sales was 0.4% of total PSU LPG sales whereas it was 0.03% in April 2020.

Figure-8 gives the month-wise LPG consumption and growth since April 2020.

**Figure-8: Month-wise LPG consumption (TMT) and growth (%) since April 2020**



**Naphtha:**

Naphtha consumption during the month of April 2021 with a volume of 1.3 MMT registered a growth of 60.7% as compared to the volume of 0.8 MMT in April 2020. Petrochemical industries remain the main consumers of naphtha. Out of the total naphtha consumption of 1272 TMT during the month, petrochemical sector had consumed 1015 TMT with a growth of 324 TMT.

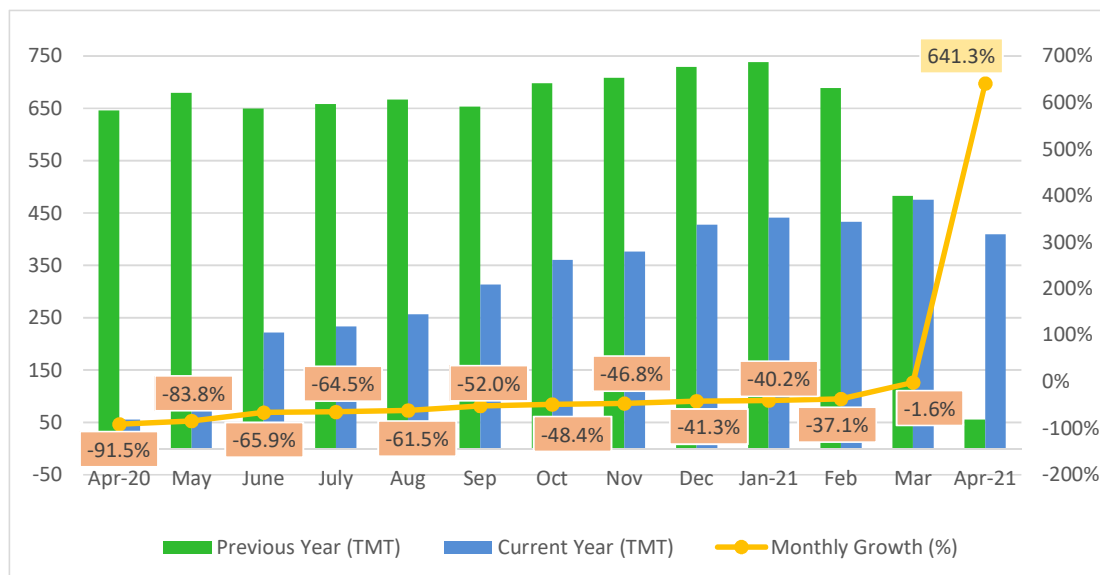
**ATF:**

ATF consumption during April 2021 registered a growth of 641.3% over the volume of April 2020. Domestic and discretionary travel has slowed down due to the resurgence of the pandemic, while international travel remains restricted.

Passengers carried by domestic airlines during the month of April 2021 stood at 57.3 lakhs as against nil during April 2020, as domestic travel was suspended in April 2020 due to COVID related precautions taken to contain pandemic.

Figure-9 gives the month-wise ATF consumption and growth since April 2020.

**Figure-9: Month-wise ATF consumption (TMT) and growth (%) since April 2020**



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

FO/LSHS consumption during the month of April 2021 recorded a growth of 85.3% over volume in April 2020. Consumption of FO/LSHS is largely driven by manufacturing and other miscellaneous sector in addition to shipping, power, road transport, agriculture, mining and others. FO/LSHS consumption saw a major growth in miscellaneous and manufacturing during the he major growth in the month of April 2021. Manufacturing consumed 181 TMT, miscellaneous 196 TMT and shipping 79 TMT out of the total consumption of 543 TMT of FO/LSHS in the month of April 2021.

### **Petcoke:**

Petcoke consumption during the month of April 2021 recorded a growth of 109.4% as compared to the volume of April 2020. 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. Manufacturing sector consumed 493 TMT and miscellaneous industrial uses consumed 975 TMT out of total 1624 TMT of petcoke consumed in the month of April 2021.

### LDO:

LDO is extensively used in various types of furnaces. LDO consumption recorded a growth of 233.5% during April 2021 as compared to April 2020. Consumption in April 2021 stood at 81.9% of the volume in the previous month of March 2021. Consumption in power generation 22 TMT and manufacturing 28 TMT were the major sectors contributing to the total consumption of 92 TMT LDO during the month.

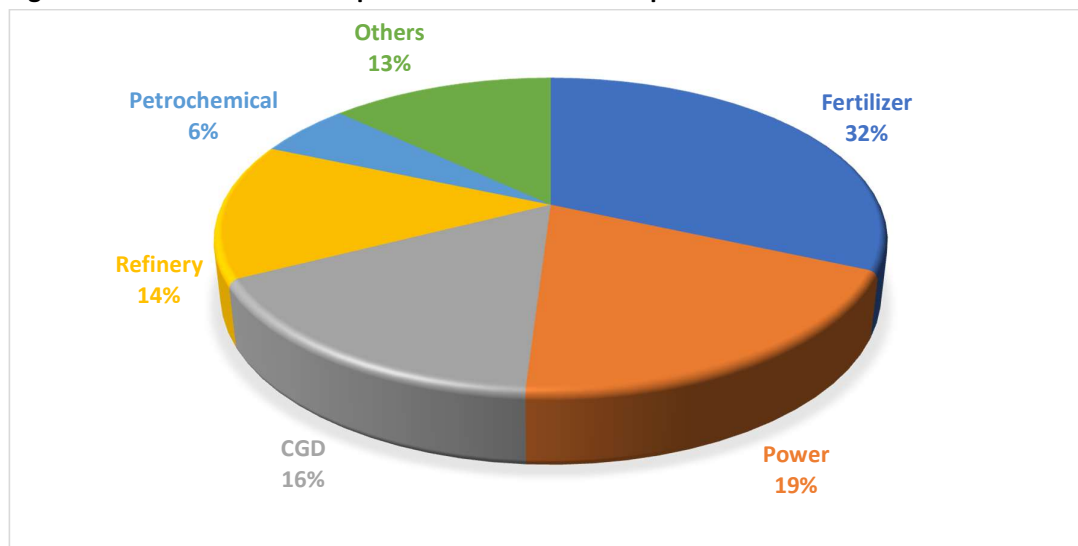
### Natural Gas:

Natural Gas is used as a feedstock in several industries like fertilizers, plastics and other commercially important organic chemicals and also 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. Consumption of Natural Gas with a volume of 5.2 BCM during the month of April 2021 recorded a growth of 33.3% over the volume of 3.9 BCM in the month of April 2020.

Approximate sector wise consumption of Natural gas for the period April - March 2021 were fertilizer (32%), power (19%), City Gas Distribution (CGD) (16%), refinery (14%), petrochemicals (5%) and others (13%).

Figure-10 gives the sector wise consumption of Natural Gas for April - March 2021.

**Figure-10: Sector wise consumption of Natural Gas for April - March 2021**



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## Industry Consumption Trend Analysis 2021-22 (Provisional)

('000 MT)

Product	April			April		
	2020-21	2021-22	Growth (%)	2020-21	2021-22	Growth (%)
<b>(A) Sensitive Products</b>						
LPG	2112	2114	0.1	2112	2114	0.1
SKO	129	105	-18.4	129	105	-18.4
<b>Sub Total</b>	<b>2241</b>	<b>2219</b>	<b>-1.0</b>	<b>2241</b>	<b>2219</b>	<b>-1.0</b>
<b>(B) Major Decontrolled Product</b>						
HSD	3253	6679	105.3	3253	6679	105.3
MS	972	2384	145.2	972	2384	145.2
Naphtha	791	1272	60.7	791	1272	60.7
ATF	55	409	641.3	55	409	641.3
Bitumen	187	658	252.7	187	658	252.7
FO/LSHS	293	543	85.3	293	543	85.3
Lubes+Greases	172	258	49.6	172	258	49.6
LDO	28	92	233.5	28	92	233.5
<b>Sub Total</b>	<b>5751</b>	<b>12295</b>	<b>113.8</b>	<b>5751</b>	<b>12295</b>	<b>113.8</b>
<b>Sub – Total (A + B)</b>	<b>7992</b>	<b>14514</b>	<b>81.6</b>	<b>7992</b>	<b>14514</b>	<b>81.6</b>
<b>(C) Other Minor Decontrolled Products</b>						
Pet.Coke	775	1624	109.4	775	1624	109.4
Others*	602	876	45.5	602	876	45.5
<b>Sub Total</b>	<b>1377</b>	<b>2499</b>	<b>81.5</b>	<b>1377</b>	<b>2499</b>	<b>81.5</b>
<b>Total</b>	<b>9369</b>	<b>17013</b>	<b>81.6</b>	<b>9369</b>	<b>17013</b>	<b>81.6</b>

\*Others include sulphur, propylene, propane, reformat, butane, MTO (Mineral Turpentine oil) etc