आज़ादी का अमृत महोत्सव

Petroleum Planning & Analysis Cell

Ministry of Petroleum & Natural Gas, Government of India

INDUSTRY CONSUMPTION REPORT-POL & NG, JULY 2022

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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) संयुक्त सचिव (मार्के.) 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 एनर्जि 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 (Refinery) Jt. Secretary (Marketing) Jt. Secretary (GP) Jt. Secretary (G) Deputy Director General (E&S) Jt. Secretary (IFD) Jt. Secretary (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 DG, FIPI MD- NRL, Guwahati/ CPCL, Chennai/ MRPL, Mangalore OMCs Planning & Retail Groups – HO

30.08.2022

No. D-12013/02/2021-II

Subject: Industry Consumption Review Report of PPAC: July 2022

The monthly Petroleum Industry Consumption Review Report has been prepared by the Petroleum Planning and Analysis Cell (PPAC). The report contains analysis of consumption of POL products and natural gas with sectoral break up during April - July 2022 (cumulative). The same is enclosed for kind reference.

If you have any question on this report, please write to Mr. Ritwik Kumar Hatial at ritwik.hatial@ppac.gov.in

संख्या : डी-12013/02/2021-II

विषय: पीपीएसी की उद्योग बिक्री समीक्षा रिपोर्ट – जून2022

मासिक पेट्रोलियम उद्योग खपत समीक्षा रिपोर्ट जुलाई 2022 के महीने के लिए पेट्रोलियम योजना और विश्लेषण सेल (पीपीएसी) द्वारा तैयार की गई है। रिपोर्ट में अप्रेल-जुलाई 2022 (संचयी) हेतु सेक्टोरल ब्रेक अप के साथ पीओएल उत्पादों और प्राकृतिक गैस की खपत का विश्लेषण शामिल है। रिपोर्ट आपके संदर्भ के लिए संलग्न है।

यदि इस रिपोर्ट पर आपका कोई प्रश्न है, तो कृपया श्री ऋत्विक कुमार हातियाल (ritwik.hatial@ppac.gov.in) को लिखें।

Thanking you,

Dr. Pankaj Sharma
Addl. Director (I/C)-D&ES

डॉ. पंकज शर्मा
अपर निदेशक (मांग एवं आर्थिक अध्ययन)-प्रभारी

HIGHLIGHTS OF THE MONTH:

The monsoon rain affected POL consumption in India during July-2022. The month saw several news highlights on alternate fuel, bioethanol projects, subsidiary schemes, gas grid infrastructure etc. some of them are listed below: -

Ministry of Petroleum and Natural Gas dedicated 166 Compressed Natural Gas (CNG) stations in 41 Geographical Areas (GA) across 14 states to service of community. This would facilitate to build up a strong gas base economy to achieve the 'set target of 15% by 2030' and a 'net zero in 2070'. As of July,2022 the length of 'National Gas Grid' is recorded at 21,715 Km against the 'target length of 33,500 Km by 2030'.

In continuation of 'The Hydrocarbon Exploration and Licensing Policy', the Central Government launched OALP bid Round-VIII offering 10 Exploration & Production blocks for competitive bidding. After successful award cumulative Exploration Acreage under OALP regime will be increased to 2,44,007 sq.km.

The Central Government announced subsidy of Rs.200 per 14.2 Kg domestic LPG cylinder upto 12 refills per year for Pradhan Mantri Ujjwala Yojana (PMUY) beneficiaries for 2022-23.

An MoU has been formed between Oil and Natural Gas Corporation Limited (ONGC) and M/s. Greenko Zero C Private Limited (Greenko) to explore opportunities in Renewables, Green Hydrogen, Green ammonia & other derivatives of green hydrogen.

India's merchandise export marked worth of USD 35.2 billion in July-2022, almost a similar level of USD 35.5 billion in July-2021. Petroleum products accounting 15.4% Indian export market share.

On YoY basis, during the first quarter of 2022-23, Indian merchandise export registered a growth rate of 19.4% to USD 156.4 compared to Q1FY2021-22.

The Goods and Services Tax collection marked Rs.1.49 lakh crore in July 2022, 28% higher than in July 2021. GST collection exceeds Rs.1.40 lakh crore band sixth time since inception and fourth month continuously since March-2022.

The average FOB (Free on Board) price of Indian basket crude oil during the month July-2022 was $105.49/bbl. Calculation is based on a derived basket of Sour grade (benchmark price of Oman & Dubai) and sweet grade (benchmark of Brent Dated) with a ratio of 75.62:24.38.

THE SUMMARY OF PRODUCT-WISE POL CONSUMPTION PATTERN DURING THE MONTH OF JULY 2022 IS AS FOLLOWS.

1. The consumption of petroleum products in July 2022 with a volume of 17.6 MMT recorded a growth of 6.1% on volume of 16.6 MMT in July 2021, 13% growth on volume of 15.6 MMT in July 2020, 3.1% growth on volume of 17.1 MMT in July 2018 and recovered 97.9% over a volume of 18MMT in July 2019. The economic momentum gained its space and got normalised with appreciable growth rate.

2. MS (Petrol) consumption during the month of July 2022 with a volume of 2.8 MMT (0.8 million barrels per day, mbpd) recorded a growth of 6.8% on the volume of 2.6MMT (0.75 mbpd) in July 2021.

3. The Sale of Passenger Vehicles in July-2022 with a volume of 2.7 lacs registered a growth 18.4% over volume of 2.4 lacs during July-2021. Two-wheeler sales in July 2022 with a volume of 12.9 lacs marked 22.8% over volume of 11.6 lacs during July-2021. Three-wheeler domestic passenger vehicles touched a sales volume of 0.26 lac in July-2022.

4. HSD (Diesel) consumption during the month of July 2022 with a volume of 6.6 MMT (1.63 mbpd) recorded a growth of 8.2% on the volume of 6.1 MMT (1.51 mbpd) in the month of July 2021. The power demand in July 2022 increased by 16.5% as compared to July 2021 and power deficit decreased to -0.4% as compared to -0.5% in the month of July 2021. The average rainfall during the month was registered at 327.7 mm with percentage of departures 17 percent with respect to 'July-normal rainfall value' of 280.5 mm. Traffic at major ports during the month of July 2022 recorded a YoY growth 9.19 % of the volumes in the month of July 2021.

5. LPG consumption during the month of July 2022 with a volume of 2.41 MMT recorded a growth of 1.7% on the volume of 2.37 MMT in the month of July 2021. As usual, LPG consumption during the month had been largely driven by consumption in domestic category.

6. ATF consumption during July 2022 with a volume of 0.6 MMT registered a growth of 84.4%, covid induced low base factor effect, over a volume of 0.3 MMT during the month of July 2021.

7. Bitumen consumption during July 2022 with a volume of 0.441 MMT registered a growth of 1.3% over a volume of 0.435 MMT in the month of July 2021.Road constructions activity was affected by large rainfall during the month.

8. Kerosene (SKO) consumption with a volume of 0.023 MMT registered a de-growth of 82.1% in July 2022 as compared to July 2021. SKO consumption during the month is largely driven by non-PDS category 0.026 MMT followed by non PDS

SKO 0.007 MMT. Nil sales has been registered in nonsubsidised PDS SKO category.

9. Average percentage of ethanol blending in petrol (EBP) marked 10.3% in July-2022. Around 38.4 cr litre ethanol has been blended in petrol under EBP program.

10. Total Natural Gas Consumption (including internal consumption) for the month of July 2022, with a volume of 5.4 BCM, recovered 95.9% to a volume of 5.5 BCM, in corresponding month of the previous year.

This report analyses the trend of consumption of petroleum products in the country during the month of July 2022. Data on product-wise monthly consumption of petroleum products for July 2022 is uploaded on the PPAC website (www.ppac.gov.in) and on the mobile app "PPACE (PPAC-Easy)". A small summary of Natural Gas consumption is also provided.

Detailed NG production and consumption reports are available at www.ppac.gov.in.

CONSUMPTION PROFILE OF POL

The growth (%) in consumption of petroleum products, category-wise, for the month of July 2022 is given in Table-1.

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

Product	July				April-July		
	% share	2021-22	2022-23	Growth (%)	2021-22	2022-23	Growth (%)
(A) Sensitive Products							
LPG	13.7	2370	2410	1.7	8897	8971	0.8
SKO	0.1	130	23	-82.1	508	209	-58.9
Sub Total	13.8	2500	2433	-2.7	9405	9179	-2.4
(B) Major Decontrolled Product							
HSD	37.7	6135	6637	8.2	24539	28803	17.4
MS	15.9	2630	2808	6.8	9416	11591	23.1
Naphtha	6.5	1215	1140	-6.1	4903	4155	-15.2
ATF	3.3	315	581	84.4	1252	2324	85.6
Bitumen	2.5	435	441	1.3	2499	2604	4.2
FO/LSHS	3.2	469	562	19.8	1897	2157	13.7
Lubes+Greases	2.0	329	344	4.6	1324	1423	7.4
LDO	0.3	77	61	-21.5	345	224	-35.2
Sub Total	71.4	11605	12574	8.3	46176	53281	15.4
(C) Other Minor Decontrolled Products							
Pet.Coke	7.6	1317	1345	2.1	4435	5111	15.3
Others*	7.2	1175	1264	7.6	3780	5171	36.8
Sub Total	14.8	2492	2609	4.7	8215	10282	25.2
Total	100	16598	17616	6.1	63795	72742	14.0

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

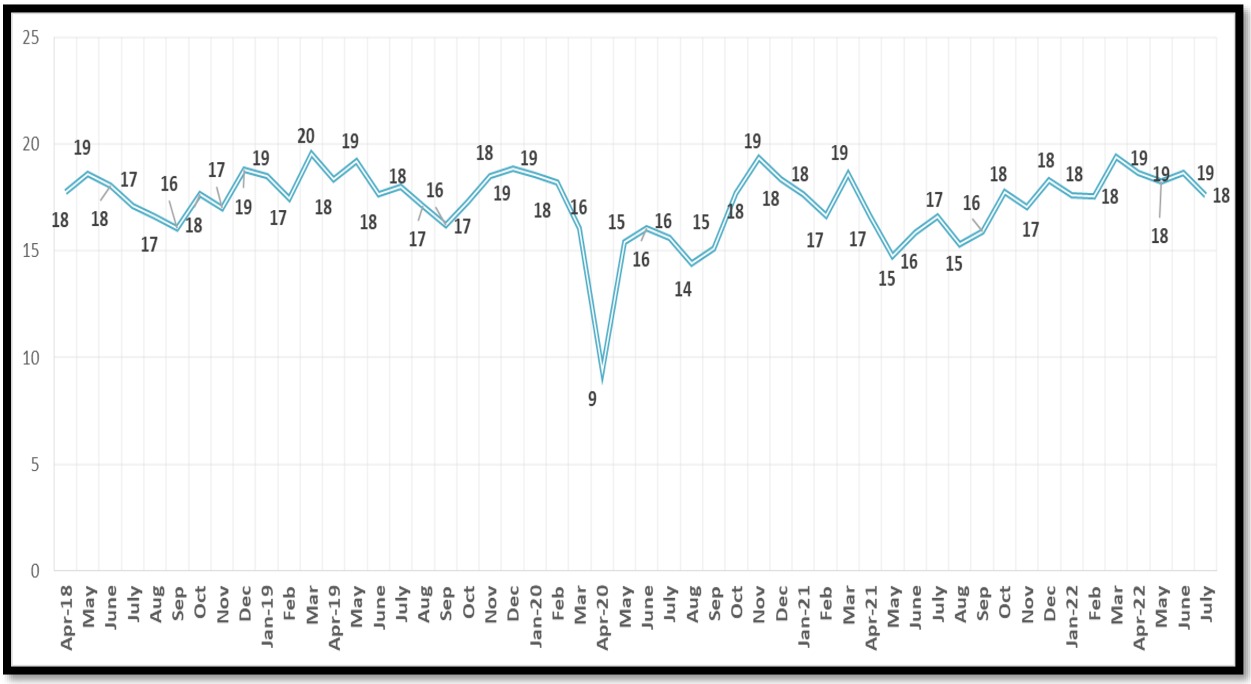
ALL PRODUCTS:

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.

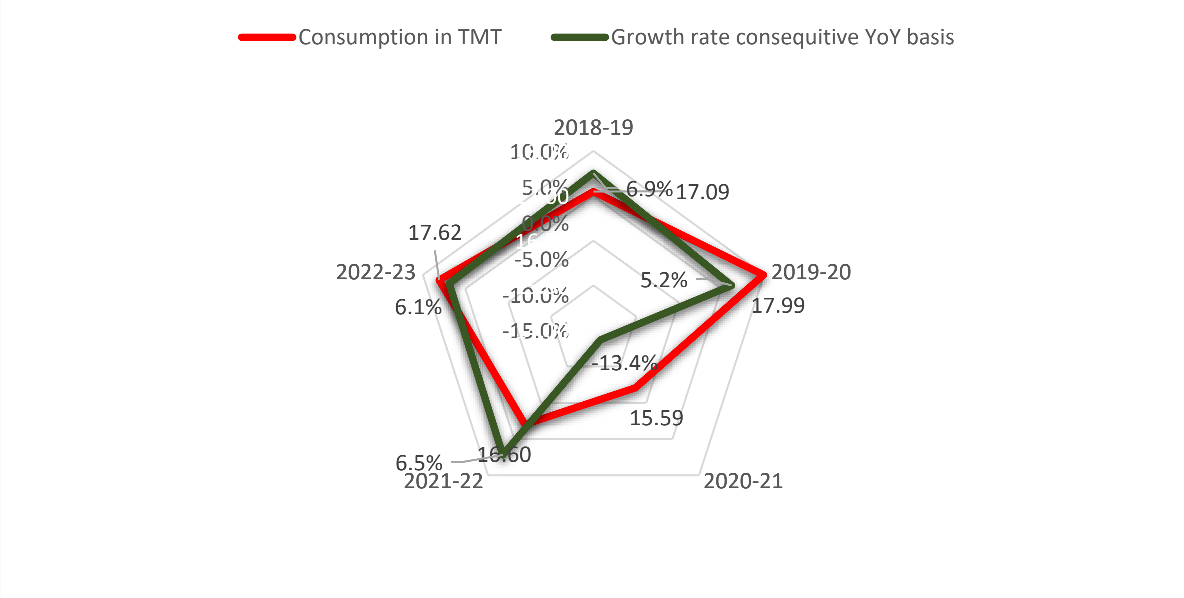
Overall consumption of all petroleum products in July 2022 with a volume of 17.6 MMT registered a growth of 6.1% on volume of 16.6 MMT in July 2021. The products which registered a growth in the month of July 2022 were Liquified Petroleum Gas (LPG) 1.7%, Petrol (MS) 6.8%, Aviation Turbine Fuel (ATF) 84.8%, High Speed Diesel (HSD) 8.2%, Furnace Oil & Low Sulphur Heavy Stock (FO/LSHS) 19.8%, Lubes & Greases 4.6%,Bitumen 1.3%, Pet coke 2.1% and products categorised under "Others" category 7.6% while the products which registered de-growth during the month were Naphtha -6.1%, Light Diesel Oil (LDO) -21.5% and Kerosene (SKO) -82.1% during the current month as compared to July 2021.

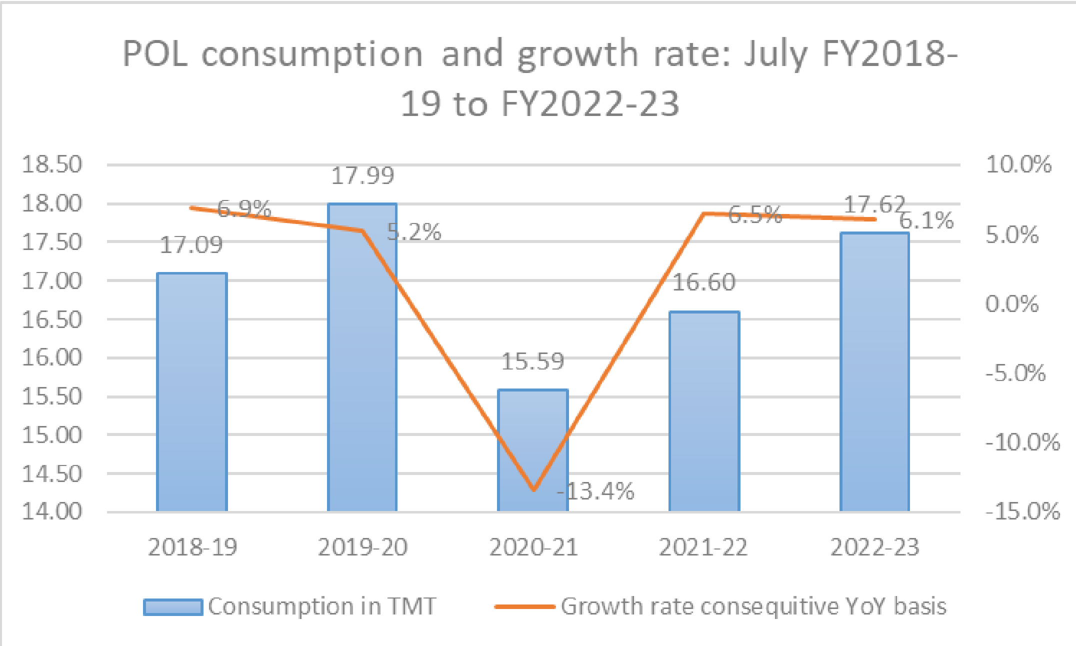
Figure-1: **Monthly POL consumption (MMT) since July 2018**



The overall POL consumption profile during July-2022 & corresponding projected growth rate were quite promising & better than pre-covid regime as found in the radar/bar chart of comparison between total POL consumption in the month of July in FY 2018-19 to FY2022-23 and its corresponding growth rate on YoY basis.

Chart-1: POL consumption & Growth rate YoY basis





PETROL/MOTOR SPIRIT (MS):

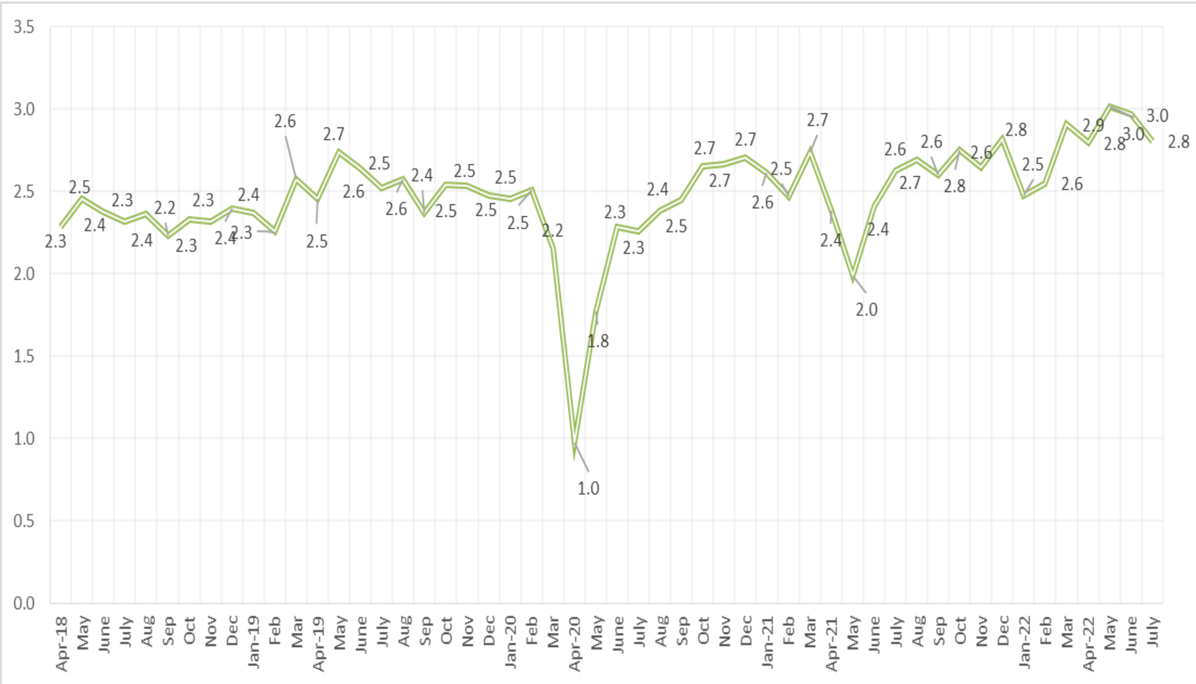
MS (Petrol) consumption during the month of July 2022 with a volume of 3 MMT registered a growth of 23.2%, 30.1%, 12.5% & 24.8% over the volume of 2.41 MMT, 2.3MMT, 2.6MMT & 2.37MMT in July 2021, 2020, 2019 & 2018 respectively.

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

- Tourism dependent states saw heavy influx of travelers during the month giving a boost to economic activities.

- Continuing MS consumption recovery was observed on YoY basis from relatively low base in 2021; similar profile might be seen for next few months.

Figure-2: Month wise MS consumption volume (MMT) since July 2018



OTHER FACTORS IMPACTING CONSUMPTION OF MS:

PASSENGER VEHICLE SALES:

The Sale of Passenger Vehicles in July 2022 at 2.9 lacs recorded growth of 11.1% YoY over sale of 2.6 lacs in the month of July 2021. 'Passenger vehicle' sales have been driven by demand for 'Passenger cars.'

Passenger cars, utility vehicles and vans recorded a growth of 10.3%, 10.5% and 28.5% respectively during the current month as compared to the same period previous year.

Table-2: Passenger vehicle sales in the month of July 2022

Vehicle Segment	July		
	2021-22	2022-23	Growth %age
Passenger Cars	130,080	143,522	10.3
Utility Vehicles	124,057	137,104	10.5
Vans	10,305	13,239	28.5
Total PV	264,442	293,865	11.1

Source: SIAM

TWO-WHEELER SALES:

Two-wheeler sales in July 2022 with a volume of 13.8 lacs recorded a growth of 9.6% on a month-on-month basis over volume of 12.6 lacs during July 2021.

Scooters/ Scootertte & Motorcycle sales recorded a growth of 28.2%, 3.9% respectively & Mopeds sales registered a degrowth of -34.8%during the current month as compared to the same period previous year.

Table-3: Two Wheelers vehicle sales in the month of July 2022

Vehicle Segment	July		
	2021-22	2022-23	Growth %age
Scooters/Scotrette	373,695	479,159	28.2
Motorcycles	837,166	870,028	3.9
Mopeds	49,279	32,116	-34.8
Total 2 Wheelers	1,260,140	1,381,303	9.6

Source: SIAM

THREE-WHEELER SALES:

Three-wheeler domestic sales in July 2022 with a volume of 0.31 lac recorded a growth of 72.8% on a month-on-month basis over volume of 0.18 lac during July 2021.

Passenger carrier and goods carrier sales recorded a growth of 105.5% & -98.1% respectively during the current month as compared to the same period previous year. The higher percentage growth is attributed to low base factor. E-rickshaw and E-cart are also registered higher individual sales during the period.

HIGH SPEED DIESEL (HSD):

HSD (Diesel) consumption during the month of July 2022 with a volume of 6.64 MMT recorded a growth of 8.2%, 20.5% & 0.4% over a volume of 6.1MMT, 5.5 MMT & 6.61 MMT in the month of July 2021,2020 & 2018 respectively where as it registered a de-growth of -3% with a volume of 6.8 MMT in July-2019.

Factors affecting diesel consumption during July 2022 are as follows:

- Sowing season ramped up HSD consumption for crop processing and transport
- Heavy monsoon affected overall HSD consumption for the month.
- IHS Markit Manufacturing Purchasing Manager's Index (PMI) marked to 56.4 in July 2022, the highest since last eight months, possibly due seasonally adjustment factors.
- HDS market share in direct and retail sales is shown in the Figure-4.

Figure-3: Month-wise HSD consumption (MMT) since July 2018

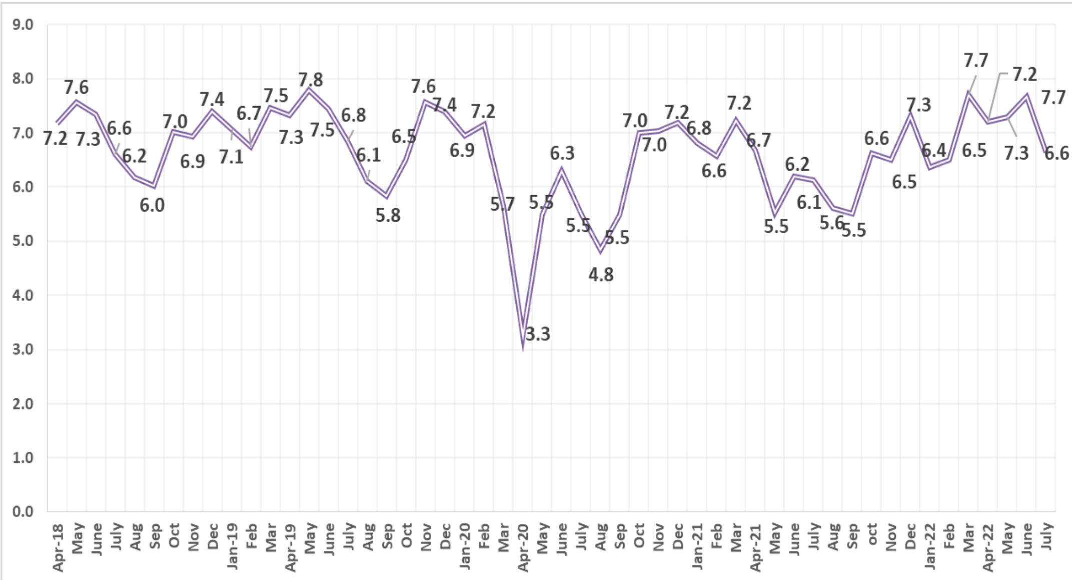
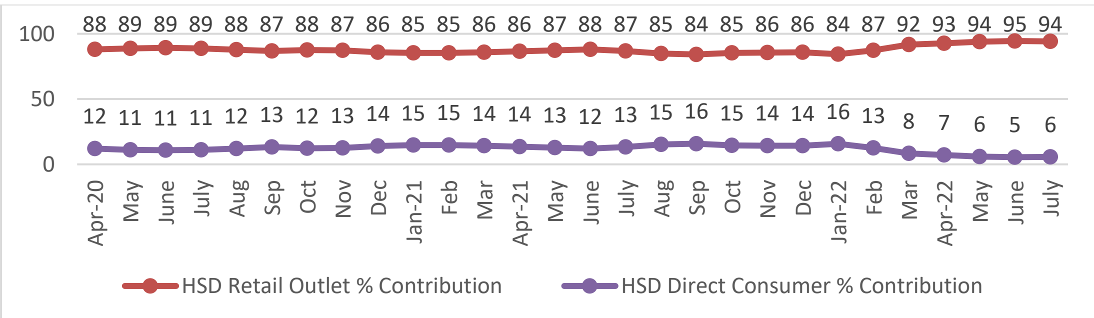


Figure-4: Share of Retail & Direct business (%) in Diesel consumption month-wise since July 2020



OTHER FACTORS IMPACTING CONSUMPTION OF HSD:

AGRICULTURAL SEASON

Agriculture seasons influence HSD demand in country significantly. This further gets swayed by the time of actual arrival of Monsoon. Agriculture related HSD sales are approximately 4.7 % from retail outlets and peak to about 10 % in Q1 which is peak agriculture season according to PPAC report 'All India study on sectoral demand for petrol and diesel.'

July -22 rainfall with 327.7 mm,

slowed Kharif showing due to delayed or deficit rains of 8%. This resulted in rise in HSD demand and put pressure on supply scenario.

Delayed sowing is now extended to July coupled with slow monsoon and will continue to influence HSD demand more particularly in northern states. Good growth will be seen in the product which is mainstay of petroleum product mix.

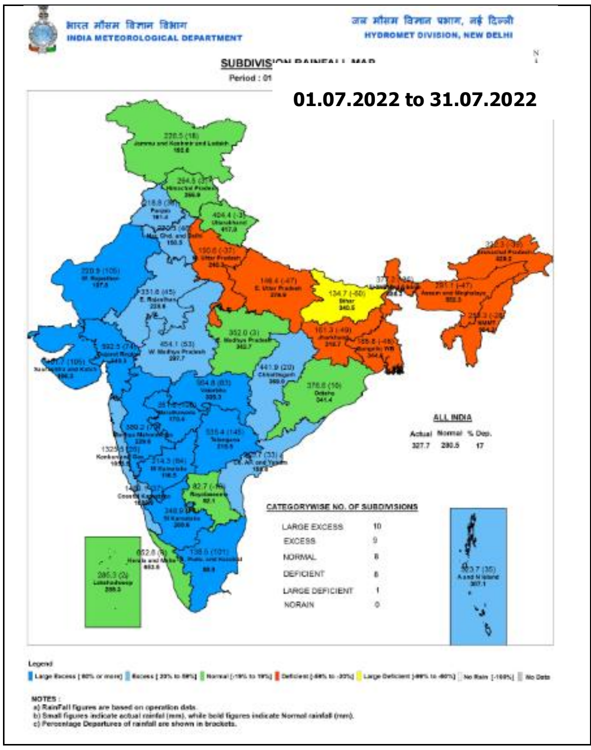
This was contributed by tractors, agricultural implements, and diesel pumps. The increase in diesel sales can be attributed to the kharif sowing season, high area under food grain cultivation and required additional transport of man and machineries. Similar consumption profile of HSD is seen during the agricultural season like:

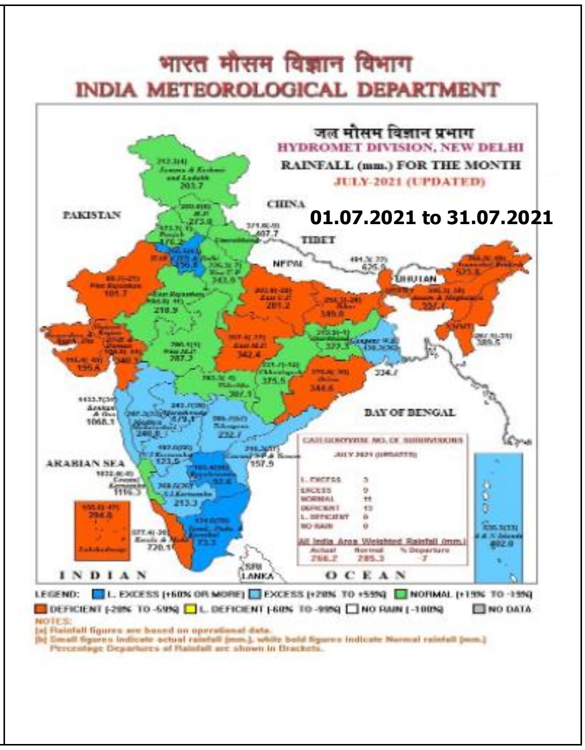
Agricultural season	Sowing & reaping month	Typical market share in agricultural sector during these months (%)
Kharif	July & November	9
Rabi	November & March	8
Zaid	March & July	8

SEASONAL RAINFALL SCENARIO:

The rainfall in the country during July 2022 was 17% above normal precipitation. A rainfall of 327.7 mm was recorded in the month of July 2022 as against a normal reading of

280.5 mm. Out of total 36 subdivisions, 19 divisions received excess to large excess rainfall, 8 divisions received deficient rainfall whereas 8 division received normal rainfall.





Source: India Meteorological Department (IMD)

COMMERCIAL VEHICLE

Based on data reported by individual companies, on an average there has been a growth of around 50% in domestic sales of commercial vehicles during the month of July 2022 as compared to July 2021, needless to comment that one of the reasons of high growth rate is covid induced low base factor. The growth in commercial vehicle indicates an emerging outlook towards robust economic growth.

TRACTOR SALE:

Tractor sales as reported by major individual companies in the month of July 2022 has recovered 84% as compared to sales in July 2021. Downward revision in quarter end output growth projection may affect the tractor sales during the month July-2022.

PORT TRAFFIC:

The traffic handled at major ports in India with a volume of 68 MMT in July 2022 recorded a growth of 12% on volume of 58 MMT in the month of July 2021.

Growth was observed in cargo handled during the month of July 2022 in all the major ports like V.O. Chidambaranar 26.4%, Kamarajar (Ennore) 19.8%, Deendayal 17.6%, Cochin 16.5%, JNPT 14.2%, Visakhapatnam 12.2%, Paradip 9.1%, Mumbai 0.8% and New Mangalore 0.4% with respect to July-2021.

During the period July 2022, along with cumulative growth of 14.5%, sector wise growth was registered in coal (thermal, steam and coking) 101.5%, miscellaneous cargo 37.1%, Petroleum Oil & lubricants (POL) 12.4%, containers tonnage 8.8% and containers TEU 7.5% with respect to July-2021. So far as commodity-wise cargo handling is concerned, the percentage share of POL was maximum i.e. 38%, followed by coal 29%, container-tonnage 26%, other miscellaneous cargo 17%, other liquids 4.3%, iron ore & pellets 3.7%, other liquids 3%, and fertilizer 1.8%.

Figure-5: Growth percentage of traffic handled at major ports since July 2020

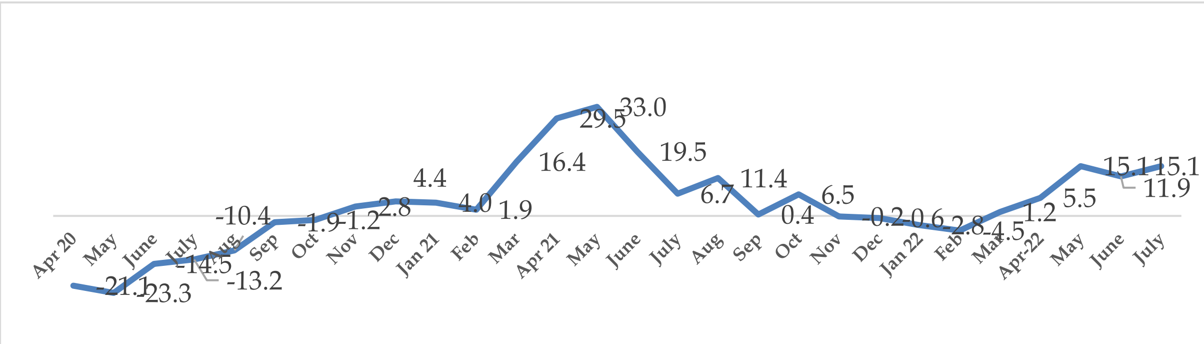


Table-4: Traffic handled at major ports in July 2022(Qty in TMT)

Ports	July 2021	July 2022	Growth (%)
Kolkata & Haldia	4,632	5,398	16.5
Paradip	9,220	10,063	9.1
Visakhapatnam	5,659	6,574	16.2
Kamarajar (Ennore)	3,066	3,830	24.9
Chennai	3,828	3,838	0.3
V.O. Chidambaranar	2,801	3,165	13.0
Cochin	2,376	2,859	20.3
New Mangalore	2,728	3,220	18.0
Mormugao	1,321	1,123	-15.0
Mumbai	4,338	4,618	6.5
JNPT	5,871	6,659	13.4
Deendayal	9,227	12,040	30.5
Total:	55067.0	63387.0	15.1

Source: ipa.nic.in

POWER SITUATION:

The position of power supply for the month of July 2022 is given in Table-5. As per the data reported, power deficit position had increased to -0.3% in July-2022 as compared to -0.4% in the month of July 2021. The requirement of power in July 2022 at 128,237 MU has recorded a growth of 3.3% over requirement of power at 126167 MU in the month of July 2021.

Table-5: Power supplied and deficit for July 2022

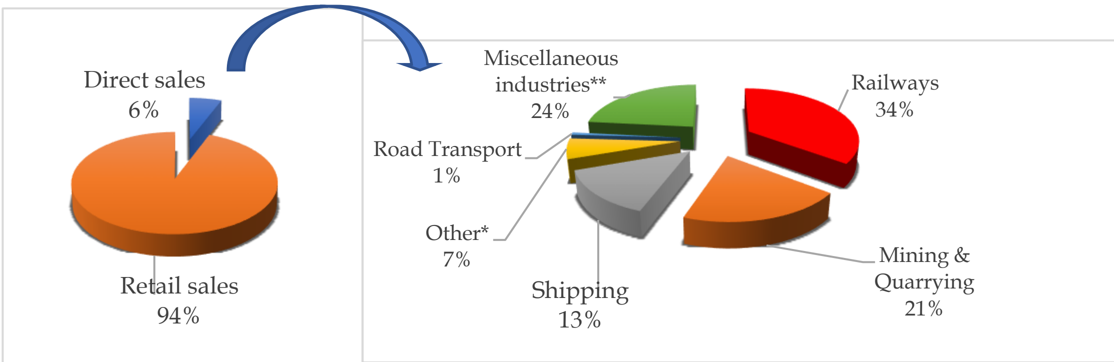
	July-2021			July-2022		
	Requirement	Supplied (MU)	Deficit %	Requirement	Supplied (MU)	Deficit %
North	45,180	44,793	-0.9%	45,049	44,860	-0.4%
West	33,799	33,796	0.0%	35,707	35,700	0.0%
South	28,072	28,065	0.0%	28,777	28,775	0.0%
East	15,374	15,325	-0.3%	16,800	16,610	-1.1%
North -East	1,742	1,741	-0.1%	1,904	1896	-0.4%
Total	124,167	123,720	-0.4%	128,237	127,841	-0.3%

Source: Central Electricity Authority (CEA)

Sectoral consumption of HSD:

The cumulative diesel sale during APRIL-JULY-2022 was 28.8 MMT; 94% of which was constituted by retail sales. Balance 6% falls under direct sales category as shown in 5A chart. In direct sales category, the sectoral consumption break up is shown in 5B chart with Railways 34% followed by Miscellaneous industries 24%, Mining & Quarrying 21%, Shipping 14%, other 7% and road transport 1%. Most of the retail sales are consumed in road transport.

Figure-5A/B: sector-wise HSD consumption

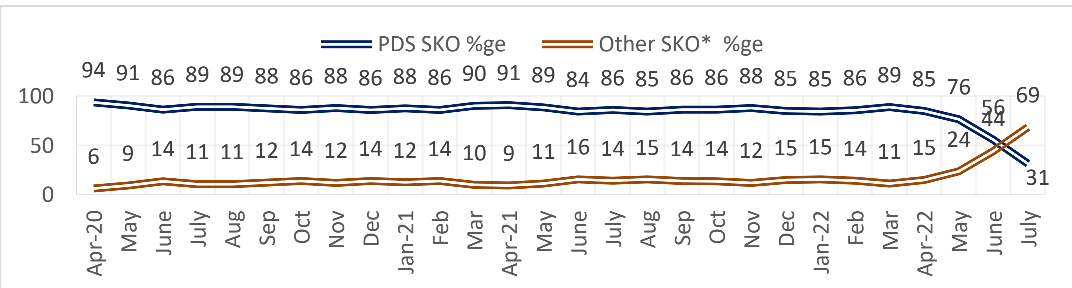


**Other: power/agriculture and metallurgy **Miscellaneous: Elec./Electronics, Mechanical, Fertilizers, Textiles, cement, ceramics, chemical, aluminium &civil etc*

KEROSENE:

Kerosene consumption during July-2022 with a volume of 0.023MMT registered a de-growth of 82.1%, 85.5%, 88.1% & 92% as compared to July 2021, 2020, 2019 & 2018 respectively. There are ten states/UTs who have voluntarily surrendered the PDS kerosene quota. Except the UT of J&K, Ladakh and Lakshadweep, all UTs and the states of Andhra Pradesh, Delhi, Haryana, Punjab, Uttar Pradesh and Rajasthan have been declared kerosene free. Nil sales has been registered in non-subsidized PDSSKO category during the month. In PDSSKO upliftment, West Bengal was the biggest consumer followed by Tamil Nadu. In non-PDS category Ladakh was the biggest consumer followed by Jammu & Kashmir and Tamil Nadu. The market share of subsidized-PDS and other SKO was 31% & 69% respectively. For the first time ever total kerosene sale was driven by 'Other SKO' category. During April-July-2022 subsidized-PDS SKO upliftment has been reported 45% of total allocation. Also, significant fall was seen in non-subsidized PDS SKO category as well.

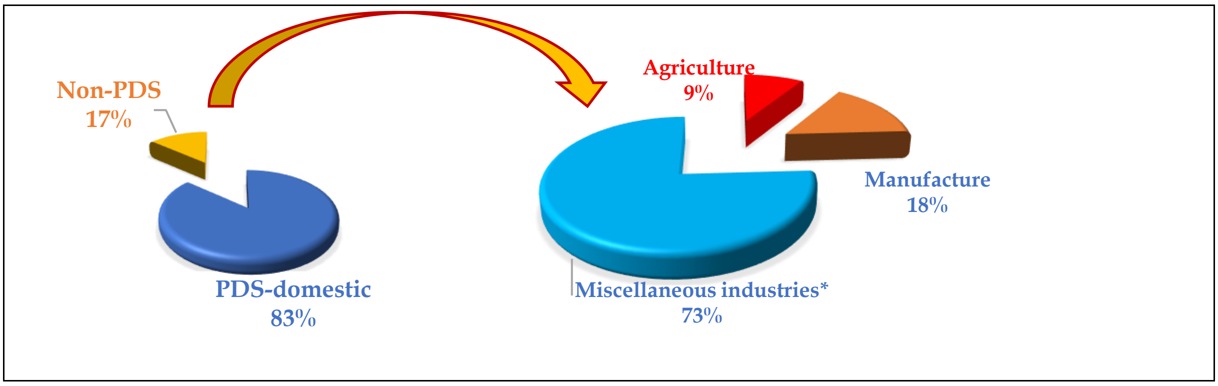
Figure-6: Month-wise PDS & other-SKO consumption in share (%) since July 2020



*Other SKO: non-subsideized PDS SKO +non-PDS kerosene

Sectoral consumption of SKO:

Out of total SKO sales during April-July-2022 with a volume of 0.21 MMT 'PDS domestic SKO' upliftment constituted to 83%. So far as SKO sales in 'non-PDS commercial sector is concerned,' 73% accounted to miscellaneous industries followed by manufacture 18% and agriculture 9% as shown in 6A/B chart.



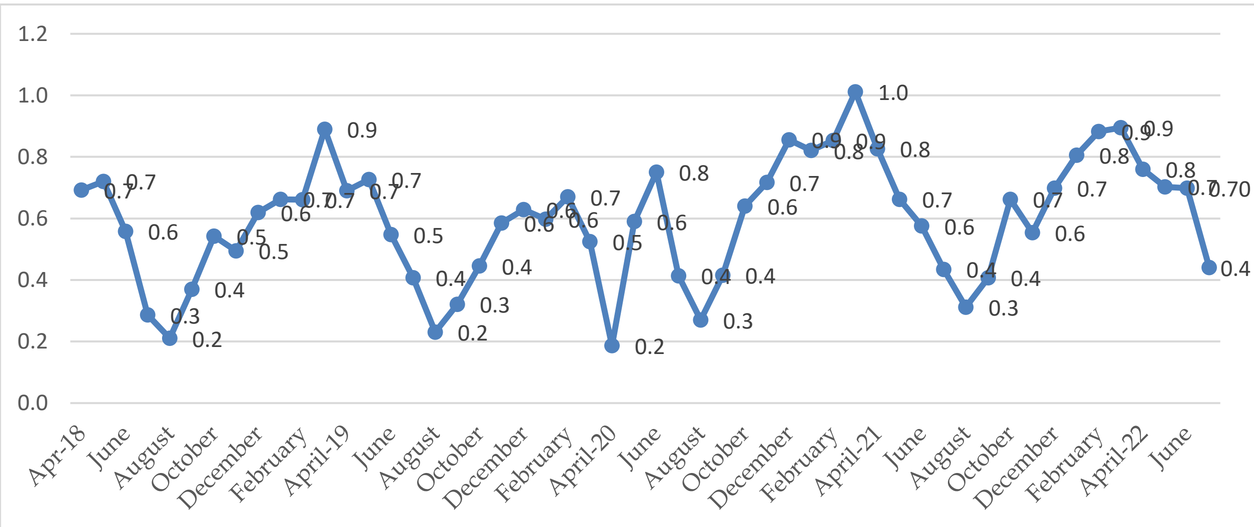
***Miscellaneous industries include aviation, mining, road transport, shipping, power generation, railways, and resellers*

Figure-6A/B: PDS domestic, non-PDS commercial SKO sales & their breakup for April-July-202

BITUMEN:

Bitumen consumption during July 2022 with a volume of 0.441 MMT recorder a growth of 21.5% on a year-on-year basis over volume of 0.58 MMT in the month of July. Significant upturn in road construction projects was observed since November-2021. However, road construction activity was severely effected by excessive rainfall in some parts of the country.

Figure-7: Month-wise Bitumen consumption (MMT) since July 2018



Sectoral consumption of Bitumen:

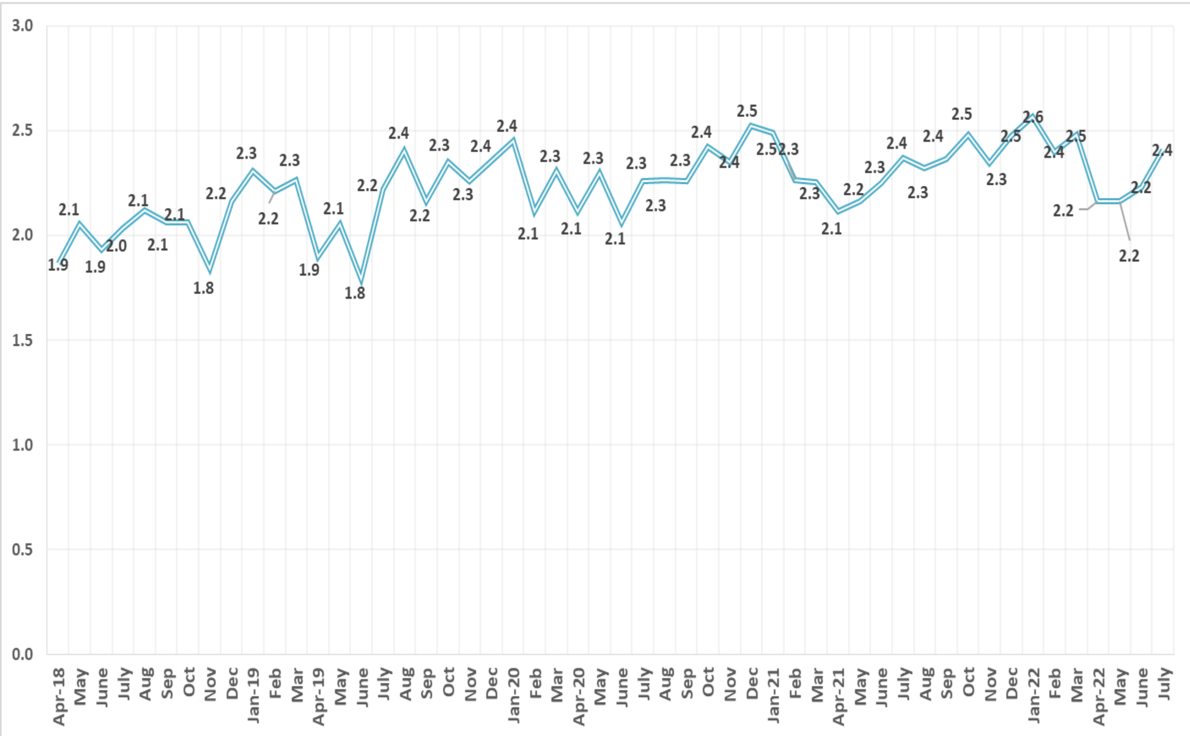
Cumulative bitumen sales during April-July-2022 marked a volume of 2.6 MMT of which 97% was constituted to Road construction, balance 3% was consumed by miscellaneous industries.

LPG:

LPG consumption during the month of July 2022 with a volume of 2.41MMT registered a growth of 1.7%,6.7%, 8.6% & 18.6% over the volume of 2.37 MMT, 2.26MMT, 2.21MMT & 2MMT in the month of July 2021,2020, 2019 & 2018 respectively. LPG consumption during the month had been driven by consumption in domestic category.

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

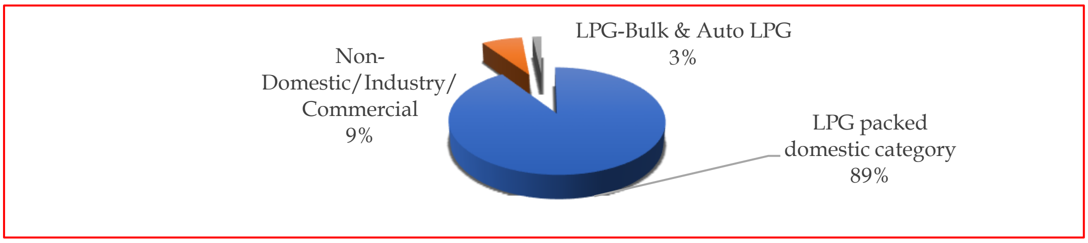
Figure-8: Month-wise LPG consumption (MMT) since July 2018



Sectoral consumption of LPG:

In April-July-2022 total LPG sale was 8.97 MMT largely driven by packed domestic category 89% followed by 'non-domestic/industry/commercial sector 9% as shown in 8A chart.

Figure-8A: Sector wise LPG consumption for April – July 2022



NAPHTHA:

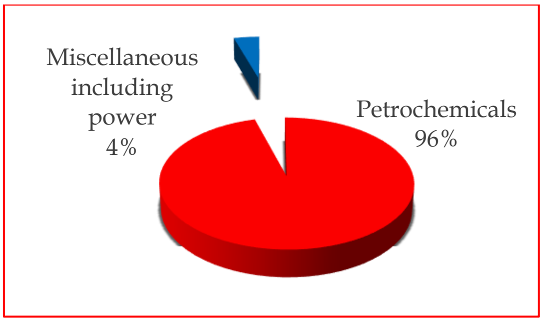
Naphtha consumption during the month of July 2022 with a volume of 1.14MMT recovered 93.9%, 87.9%, 77.8% & 87.7% over the volume of 1.21,1.30,1.5 & 1.3 MMT in July2021, 2020,2019 & 2018 respectively.

Petrochemical industries remain the main consumers of naphtha.

Sectoral consumption of Naphtha:

Consumption of naphtha during April-July-2022 with a volume of 4.2MMT was largely driven by petrochemicals sector 96%, whereas 4% naphtha consumption fell in 'miscellaneous industries including power' as shown in 8A chart.

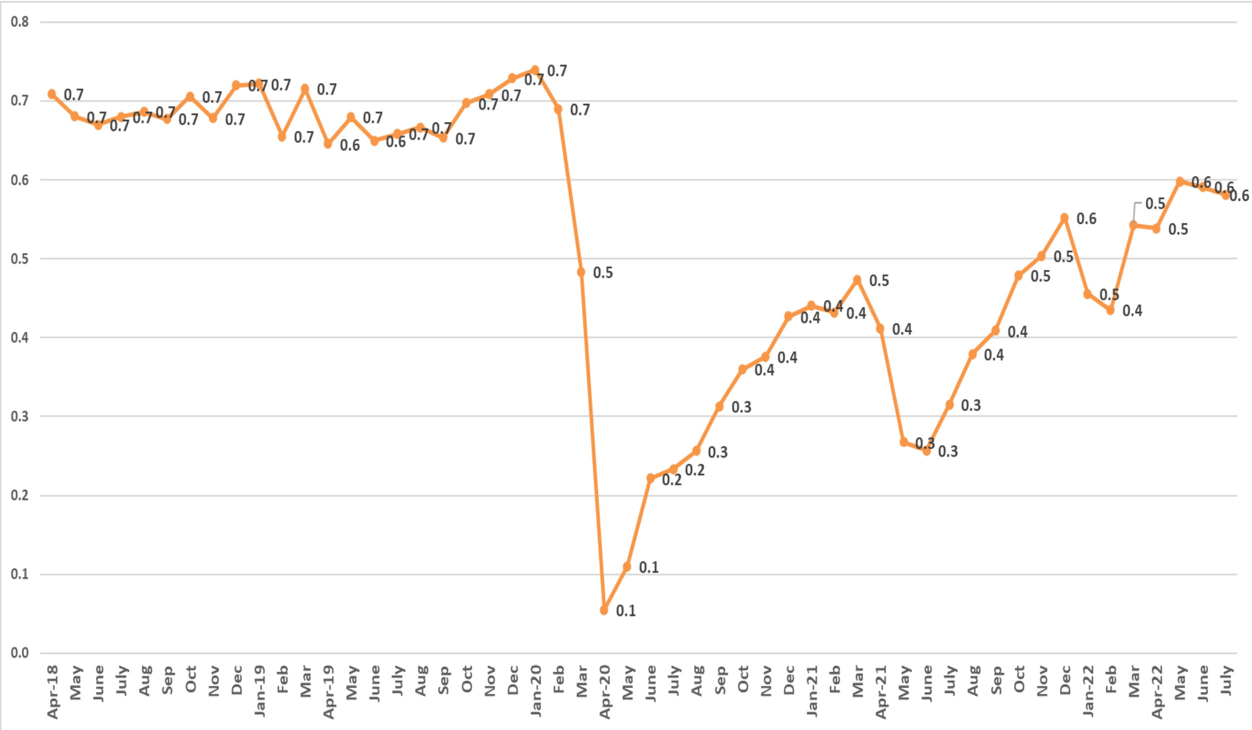
Figure-8A: Sector wise naphtha consumption for April – July 2022



ATF:

ATF consumption during July 2022 with a volume of 0.6 MMT registered a growth of 84.4% over the volume of 0.3 MMT in July 2021. The higher growth figures are largely affected by covid induced low base factor. Month wise ATF consumption since July-2018 is depicted in the Figure-9.

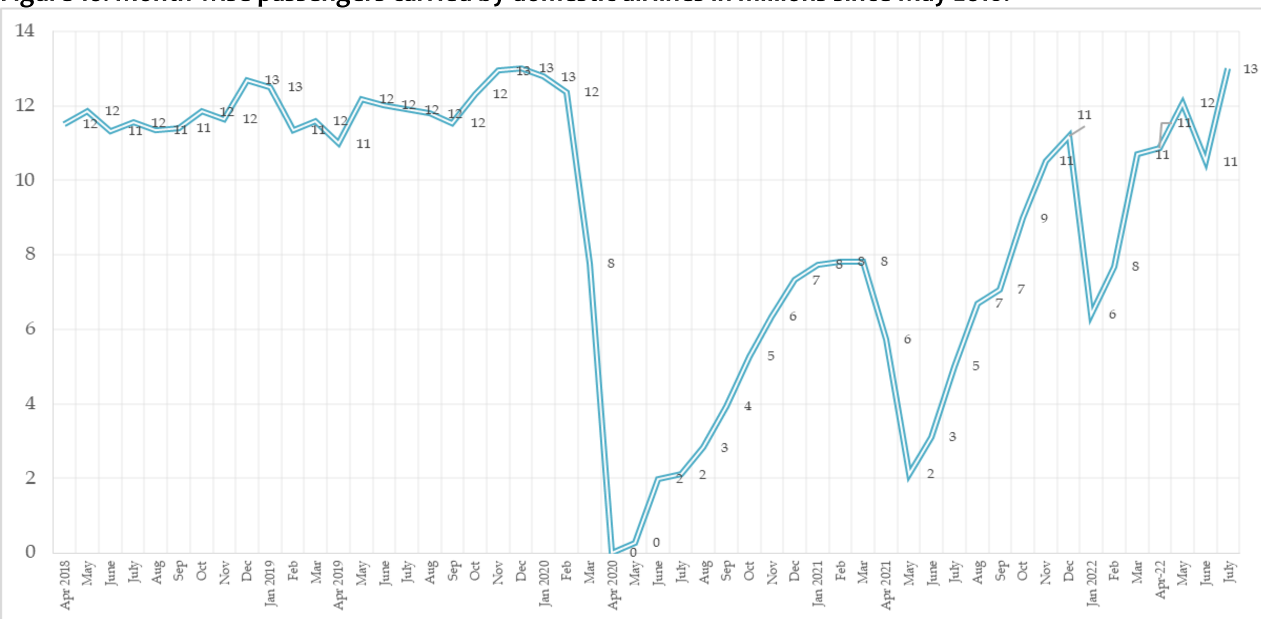
Figure-9: Month-wise ATF consumption (MMT) since July 2018



Domestic air travel continued to grow to gain the pace of pre-covid momentum. International air travel continued to emerge during the month.

Passengers carried by domestic airlines during the month of July 2022 stood at 113.12 lakhs against 32.13 lakhs during July 2021.

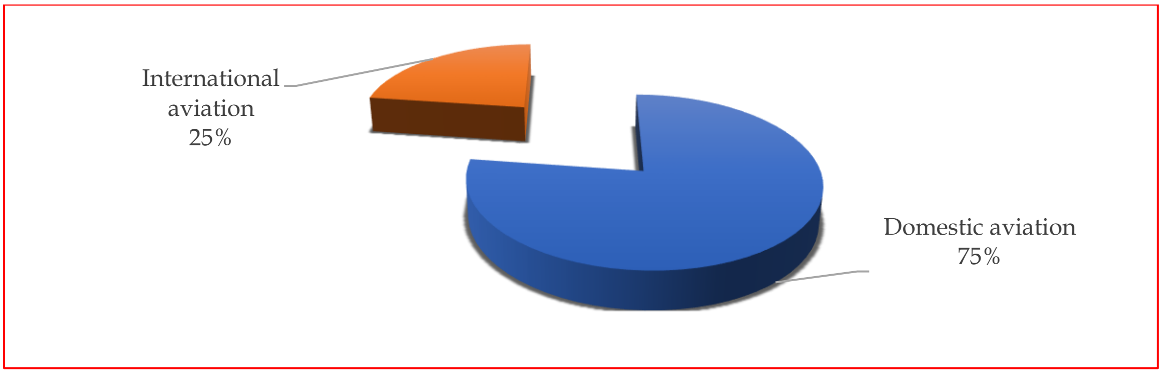
Figure-10: Month-wise passengers carried by domestic airlines in millions since May 2018.



Sectoral consumption of ATF:

Almost entire ATF consumption during April-July-2022 with a volume of 2.32 MMT, attributed to aviation sector;75% domestic & 25% international aviation as shown in the chart.

Figure-10A: Sector wise **ATF consumption for FY2022-23**



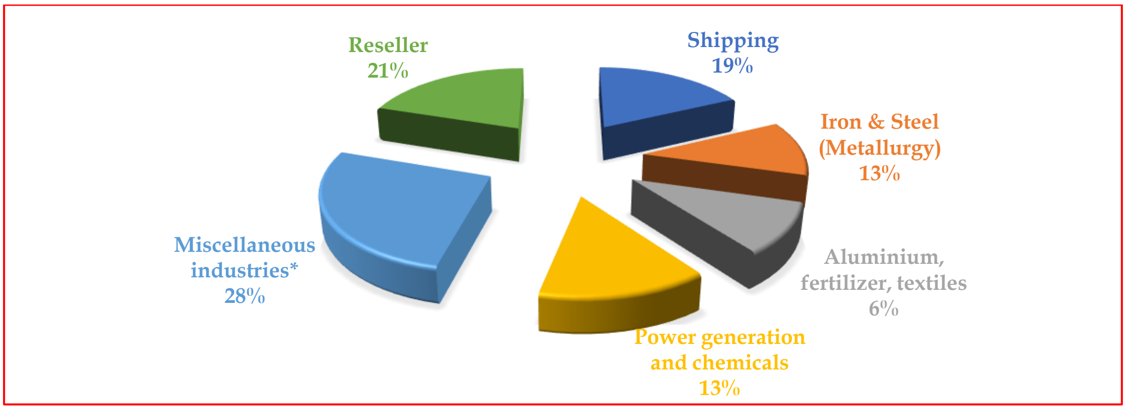
FURNACE OIL & LOW SULPHUR HEAVY STOCK (FO/LSHS):

FO/LSHS consumption during July 2022 with a volume of 0.56 MMT recorded a growth rate of 19.8%,19.9% & 10.4% year-to-year basis over volume of 0.47 MMT, 0.47MMT, 0.51MMT in the month of July 2021, 2020 & 2018 respectively. However, it recovered 99.4% over the volume of 0.57MMT in July-2019.

Sectoral consumption of FO/LSHS:

Consumption of FO/LSHS during April-July-2022 with a volume of 2.2 MMT was largely driven by 'Miscellaneous industries' 28% followed by Reseller 21%, 'shipping' 19%, 'power generation and chemicals' 13%, 'Iron & steel (metallurgy)' 13% & 'Aluminium, fertilizer& textiles' 6% as shown in the chart.

Figure-10B: Sector wise FO+LSHS consumption for April – July 2022



**Miscellaneous usage includes Civil Engineering, Elec./Electronics, Mechanical etc.*

PETCOKE:

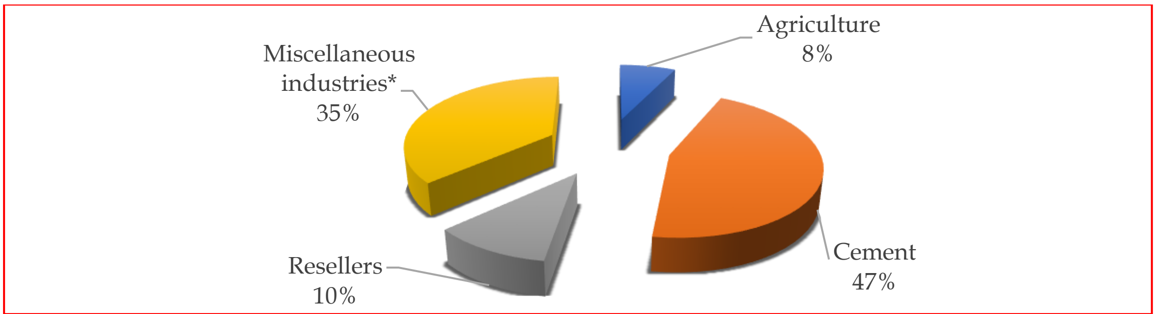
Petcoke consumption during the month of July 2022 with a volume of 1.34 MMT recorded a growth of 2.1% over volume of 1.32 MMT in the month of July 2021. However, it recovered to 81.6%, 79.7% and 76.2% on year-to-year basis over a volume of 1.65MMT, 1.69 MMT & 1.76MMT in July-2020,2019 & 2018 respectively.

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.

Sectoral consumption of Petcoke:

Petcoke consumption during April-July-2022 was of 5.1MMT. The domestic sales largely driven by 'miscellaneous industries' 35%, followed 'cement industries' 47% as shown in the chart.

Figure-10A: Sector wise Petcoke consumption for APRIL-JULY-2022



**Miscellaneous industries include power, civil, metallurgy, mining & shipping*

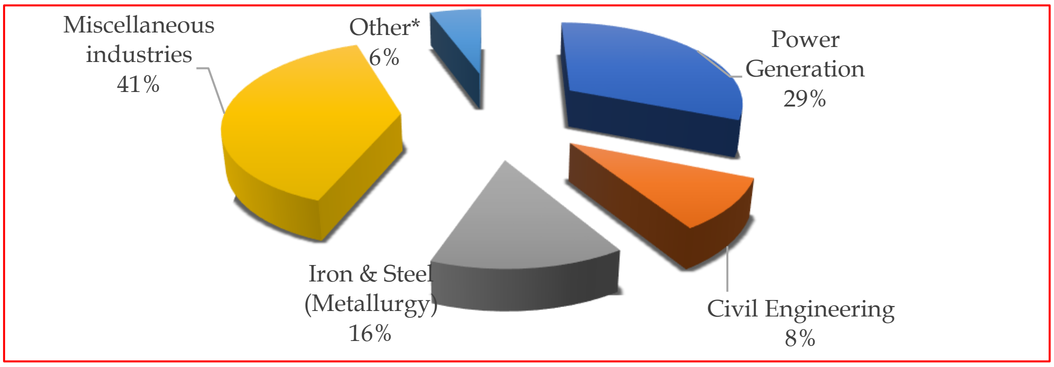
LIGHT DIESEL OIL:

LDO consumption during the month July-2022 with a volume of 0.061 MMT recovered 78.5% & 97.1% on year-to-year basis over a volume of 0.077, 0.062 MMT MMT in the month of July 2021 & 2020 respectively. However, it registered growth rate of 17.6% and 38% over a volume of 0.052MMT and 0.044MMT in the month July-2019 &2018 respectively. LDO is extensively used in various types of furnaces.

Sectoral consumption of Light Diesel Oil:

During April-July-2022, consumption of Light Diesel oil (LDO) with a volume of 0.224 MMT was largely driven by 'miscellaneous industries' 41% & 'Power Generation' 29% followed by 'Iron & steel (metallurgy) 16% and 'other' 6% as shown below sectoral consumption pie-chart.

Figure-11: Sector wise LDO consumption for April-July 2022



**Other includes ceramic, aluminium, textiles, mining etc*

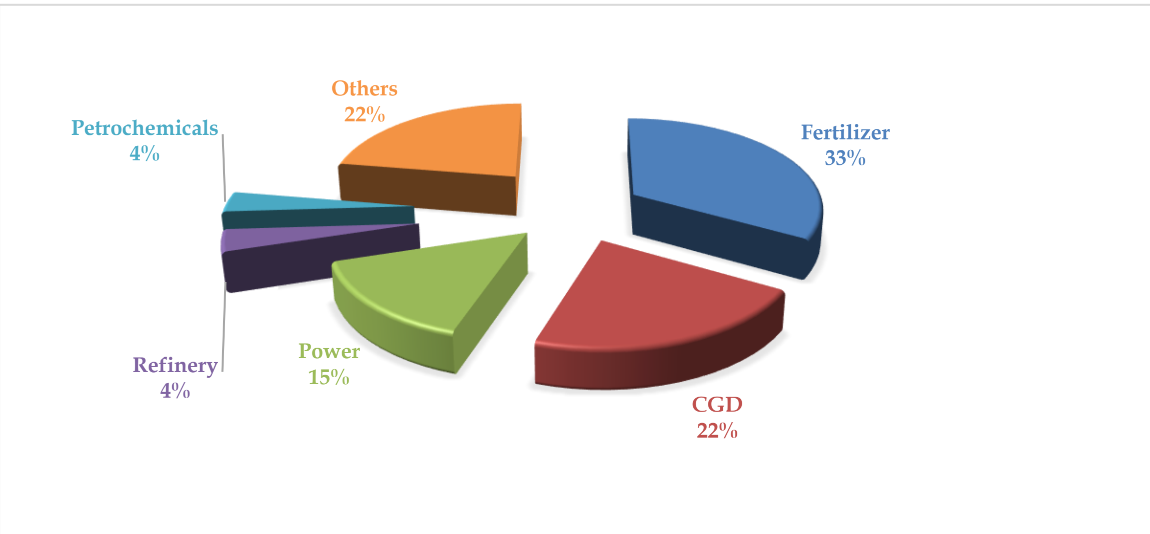
NATURAL GAS:

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. Consumption of Natural Gas with a volume of 5.4 BCM (billion cubic metres) during the month of July 2022 recovered 98.5 % on volume of 5.5 BCM in the month of July 2021.

Sectoral consumption of Natural Gas:

During April-July-2022, consumption of Natural gas (NG) with a volume of 19.2 BCM was largely driven by the fertilizer (33%), City Gas Distribution (CGD) (22%), Internal consumption (refinery & petrochemicals) 8%, power (15%), and others (22%).

Figure-12: Sector wise consumption of Natural Gas for April-July 2022 only



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Conversion factors taken for TMT 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

Industry Consumption Trend Analysis 2022-23 (Provisional)						
						('000 MT)
Product	April - July_cumulative			July		
	2021-22	2022-23	Growth(%)_2021-22 to 2022-23	2021	2022	Growth(%)_ 2021 to 2022
(A) Sensitive Products						
LPG	8897	8971	0.8	2370	2410	1.7
SKO	508	209	-58.9	130	23	-82.1
Sub Total	9405	9179	-2.4	2500	2433	-2.7
(B) Major Decontrolled Product						
HSD	24539	28803	17.4	6135	6637	8.2
MS	9416	11591	23.1	2630	2808	6.8
Naphtha	4903	4155	-15.2	1215	1140	-6.1
ATF	1252	2324	85.6	315	581	84.4
Bitumen	2499	2604	4.2	435	441	1.3
FO/LSHS	1897	2157	13.7	469	562	19.8
Lubes+Greases	1324	1423	7.4	329	344	4.6
LDO	345	224	-35.2	77	61	-21.5
Sub Total	46176	53281	15.4	11605	12574	8.3
Sub - Total (A) + (B)	55580.7	62459.9	12.4	14105.4	15007.1	6.4
(C) Other Minor Decontrolled Products						
Pet.Coke	4435	5111	15.3	1317	1345	2.1
Others*	3780	5171	36.8	1175	1264	7.6
Sub Total	8215	10282	25.2	2492	2609	4.7
Total	63795	72742	14.0	16598	17616	6.1

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

Industry Consumption Trend Analysis 2022-23 (Provisional)						
						('Million barrels per day)
Product	April - June_cumulative			June		
	2021-22	2022-23	Growth(%)_2021-22 to 2022-23	2021	2022	Growth(%)_ 2021 to 2022
(A) Sensitive Products						
LPG	0.85	0.85	0.8	0.89	0.90	1.7
SKO	0.03	0.01	-58.9	0.03	0.01	-82.1
Sub Total	0.88	0.87	-1.5	0.92	0.91	-1.4
(B) Major Decontrolled Product						
HSD	1.53	1.80	17.4	1.51	1.63	8.2
MS	0.69	0.84	23.1	0.75	0.80	6.8
Naphtha	0.35	0.30	-15.2	0.34	0.32	-6.1
ATF	0.08	0.15	85.6	0.08	0.15	84.4
Bitumen	0.12	0.13	4.2	0.08	0.09	1.3
FO/LSHS	0.10	0.12	13.7	0.10	0.12	19.8
Lubes+Greases	0.08	0.08	7.4	0.08	0.08	4.6
LDO	0.02	0.01	-35.2	0.02	0.01	-21.5
Sub Total	2.98	3.44	15.5	2.97	3.21	8.2
Sub - Total (A) + (B)	4	4	11.6	3.89	4.12	5.9
(C) Other Minor Decontrolled Products						
Pet.Coke	0.20	0.23	15.3	0.04	0.04	2.1
Others*	0.25	0.34	36.8	0.04	0.04	7.6
Sub Total	0.45	0.57	27.2	0.08	0.08	4.7
Total	4	5	13.2	3.97	4.20	5.9

*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