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

INDUSTRY CONSUMPTION REPORT-POL & NG, SEPTEMBER 2022

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पेट्रोलियम और प्राकृतिक गैस मंत्रालय:	**MoP&NG:**
निजी सचिव- माननीय मंत्री - (पेट्रोलियम और प्राकृतिक गैस) ओ एस डी- माननीय मंत्री - (पेट्रोलियम और प्राकृतिक गैस) निजी सचिव- माननीय राज्य मंत्री - (पेट्रोलियम और प्राकृतिक गैस) सचिव, पीएनजी अपर सचिव, पीएनजी अपर सचिव एवं वित्त सलाहकार संयुक्त सचिव (रिफाइनरी) 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

From the desk of DG-PPAC

Greetings from Petroleum Planning & Analysis Cell!

Dear readers,

Industry POL and NG consumption report, published by PPAC is an assessment of pan India month wise demand and distribution profile of POL & NG products and its qualitative analysis. The sectoral breakup of consumption of each product would put a light on the actual percentage share of a finished product to its end users.

Apart from POL and NG consumption, several secondary quantitative analyses like power supply data and its YoY comparison, rainfall statistics, commercial vehicles sales and its sectoral domestic sales, Indian marine cargo handling and the current news highlights related on Indian oil, gas & energy sector are also captured in the report.

I hope the report would serve the purpose for stakeholders in the oil and gas value chain planners, policymakers, academicians, analysts, market researchers & the industries.

पेट्रोलियम योजना एवं विश्लेषण प्रकोष्ठ की ओर से अभिवादन!

प्रिय पाठकों,

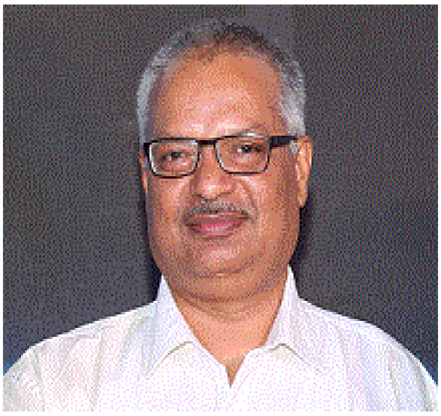
पीपीएसी द्वारा प्रकाशित उद्योग पीओएल और एनजी खपत रिपोर्ट, पीओएल और एनजी उत्पादों की अखिल भारतीय मासिक मांग और वितरण प्रोफ़ाइल और इसके गुणात्मक विश्लेषण का आकलन है। प्रत्येक उत्पाद की खपत का क्षेत्रवार विभाजन अपने अंतिम उपयोगकर्ताओं के लिए उत्पाद के प्रतिशत हिस्से पर प्रकाश डालेगा।

पीओएल और एनजी खपत के अलावा, कई माध्यमिक मात्रात्मक विश्लेषण जैसे बिजली आपूर्ति डेटा और इसकी वर्ष-दर-वर्ष तुलना, वर्षा के आंकड़े, वाणिज्यिक वाहनों की बिक्री और इसकी क्षेत्रीय घरेलू बिक्री, भारतीय समुद्री कार्गो हैंडलिंग और भारतीय तेल, गैस और ऊर्जा क्षेत्र से संबंधित वर्तमान समाचार हाइलाइट्स रिपोर्ट में भी दर्ज हैं।

मुझे उम्मीद है कि रिपोर्ट तेल और गैस मूल्य श्रृंखला योजनाकारों, नीति निर्माताओं, शिक्षाविदों, विश्लेषकों, बाजार शोधकर्ताओं और उद्योगों में हितधारकों के उद्देश्य की पूर्ति करेगी।

D.K. Ojha
Director General-PPAC
डी.के.ओझा
महानिदेशक-पीपीएसी

From the desk of D&ES- I/C



संख्या : डी-12013/02/2022-II
No. D-12013/02/2022-II

Subject: Industry Consumption Review Report of PPAC: September 2022

At the advent of announcement of "India's Energy week 2023" as the preseidency holder of G20 summit, India earned several acreages on 'Self Reliance in energy sector" during the month like production of special indigeneous aviation fuel for aircrafts, progessive ethanol programme etc.

The overall POL consumption is 17.2 MMT in September-2022. During last two months overall petroleum consumption was subdued by heavy rainfall in some parts of the country and for the month it has sirinked a bit. Despite all these natural factors, POL consumption growth for Sept-2022 stayed high.

IHS Markit Manufacturing Purchasing Manager's Index (PMI) marked at 55.1 in September 2022 from 56.2 from August, probably due to quarter ending effect.

The crude supply to India remained flexible & the average crude price for Indian Basket in September-22 hinged around USD90.71/bbl.

The Petroleum Planning and Analysis Cell (PPAC) have prepared the monthly Petroleum Industry Consumption Review Report. The report contains analysis of consumption of POL products and natural gas with sectoral break up during April - September 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.

विषय: पीपीएसी की उद्योग बिक्री समीक्षा रिपोर्ट – सितम्बर 2022

G20 शिखर सम्मेलन के अध्यक्ष के रूप में "भारत ऊर्जा सप्ताह 2023" की घोषणा के साथ भारत ने महीने के दौरान 'ऊर्जा क्षेत्र में आत्मनिर्भरता' के लिये कई कदम बढ़ाये जैसे पिस्टन इंजन वाले विमानों के लिए विशेष स्वदेशी विमानन ईंधन लॉन्च करना और प्रगतिशील इथेनॉल कार्यक्रम आदि।।
सितंबर-2022 में कुल पीओएल खपत 17.2 एमएमटी रही। पिछले दो महीनों के दौरान देश के कुछ हिस्सों में भारी वर्षा से पेट्रोलियम की खपत प्रभावित हुई परन्तु पीओएल खपत में वृद्धि दर्ज की गयी।

IHS मार्किट मैन्युफैक्चरिंग परचेजिंग मैनेजर्स इंडेक्स (PMI) शायद तिमाही समाप्ति प्रभाव के कारणसितंबर 2022 में 55.1 पर चिह्नित हुआ, जो अगस्त में 56.2 था। भारत में कच्चे तेल की आपूर्ति लचीली रही और सितंबर-22 में भारतीय बास्केट के लिए कच्चे तेल की औसत कीमत लगभग USD90.71/bbl थी।
पेट्रोलियम योजना और विश्लेषण प्रकोष्ठ (PPAC) द्वारा मासिक पेट्रोलियम उद्योग खपत समीक्षा रिपोर्ट तैयार की गई है। रिपोर्ट में अप्रैल-अगस्त 2022 (संचयी) के दौरान क्षेत्रीय ब्रेक अप के साथ पीओएल उत्पादों और प्राकृतिक गैस की खपत का विश्लेषण शामिल है। यह आपके संदर्भ के लिए संलग्न है।
यदि इस रिपोर्ट पर आपका कोई प्रश्न है, तो कृपया श्री ऋत्विक कुमार हटियाल को ritwik.hatial@ppac.gov.in पर लिखें।

डॉ. पंकज शर्मा
अपर निदेशक (मांग एवं आर्थिक अध्ययन) – प्रभारी
Dr. Pankaj Sharma
Addl. Director (I/C)-D&ES

HIGHLIGHTS OF THE MONTH:

Hon'ble Prime Minister of India anaugurated the 'World's First CNG Terminal' in Bhavnagar. This terminal would facilitate an additional alternate source of clean energy.

The government signed contracts for 31 discovered small fields (DSF) under the third round of bidding, thus raising hope for increasing domestic crude production in coming years.

First green hydrogen fueling station is expected to be commissioned in Leh by May next year by NTPC. The pilot project will produce 80 Kilogram per day of pure hydrogen and same will be available for dispensesation.

Country is exploring ways to decarbonize trucking sector and September saw India's first Liquefied Natural Gas (LNG) fuelled green truck with1000-lt fuel tank which can travel up to 1400 km in a single fill. Similarly, Tata Motors launched Country's first CNG operated M&HCV truck in the 28 and 19 tonne nodes with a range of about 1000 km. Meanwhile, NITI Aayog launched the country's first national electric freight platform – e-FAST India paving way for growth of electric freight including trucking.

India's merchandise export achieved worth of USD 32.6 billion in September-2022; it recovered 96.5% from USD 33.8 billion in September-2021. Export worth in some sectors subdued on account of slowdown in some developed economies and consequential slowdown in demands. Petroleum products accounting Indian export market share of 18.64% achieved growth rate of of 17% comaped to September-21.

On YoY basis, during April-September of 2022-23, Indian merchandise export registered a growth rate of 17.1% to USD 192.59 billion with respect to same period in 2021-22.

The Goods and Services Tax collection marked Rs.1.48 lakh crore in September 2022, 26% higher than in September 2021. GST collection exceeds Rs.1.40 lakh crore band seventh time in a row since March-2022.

The government extended the deadline for Rs 2 Additional Excise Duty On Petrol and Diesel to allow the industry some more time to meet the target. Now, industry has time till November 2022 for supplying ethanol-blended petrol and till April 2023 for bio-diesel doped diesel. It is noteworthy that country already has ethanol blending in petrol (EBP) to the tune of 9.94% till September-2022.

The average FOB (Free on Board) price of Indian basket crude oil during the month September-2022 was USD 90.71/bbl.

The power demand in September 2022 increased by 1.6% as compared to September 2021 and power deficit decreased to -0.4% as compared to -0.6% in the month of September 2021. The average rainfall during the month was registered at 181.3 mm with percentage of departures 8percent with respect to 'this year September normal rainfall value' of 167.9 mm. Traffic at major ports during the month of September 2022 recorded a YoY growth 14.9% of the volumes in the month of September 2021.
The growth percentage in consumption of petroleum products, category-wise, for the month of September 2022 is given in Table-1.

SUMMARY OF PRODUCT WISE POL CONSUMPTION PROFILE FOR SEPTEMBER-22

1. The consumption of petroleum products in September 2022 with a volume of 17.2 MMT recorded a growth of 8.1% on volume of 15.9 MMT in September 2021, 13.5% growth on volume of 15.1 MMT in September 2020, 6.1% growth on volume of 16.2 MMT in September 2019 and 6.9% growth on volume of 16.1 MMT in September 2018. The economic momentum is under acceleration with appreciable growth rate.
2. MS (Petrol) consumption during the month of September 2022 with a volume of 2.8 MMT (0.81 million barrels per day, mbpd) ecorded a growth of 8.8% on the volume of 2.6MMT (0.74 mbpd) in September 2021.
   The Sale of Passenger Vehicles in September-2022 with a volume of 2.9 lacs registered a growth 14.5% over volume of 26 lacs during September-2021. Two-wheeler sales in September 2022 with a volume of 10.2 lacs marked 9% over volume of 9.32 lacs during September-2021. Three-wheeler domestic passenger vehicles touched a sales volume of 0.63 lac in September-2022.

3. HSD (Diesel) consumption during the month of September 2022 with a volume of 6.3 MMT (1.56 mbpd) recorded a growth of 13.4% on the volume of 5.5 MMT in the month of September-21

4. LPG consumption during the month of September 2022 with a volume of 2.4 MMT recorded a growth of 3.6% on the volume of 2.36 MMT in the month of September 2021. As usual, LPG consumption during the month had been largely driven by consumption in domestic category.

5. ATF consumption during September 2022 with a volume of 0.59 MMT registered a growth of 44.7%, covid induced low base factor effect, over a volume of 0.41 MMT during the month of September 2021.

6. Bitumen consumption during September 2022 with a volume of 0.47 MMT registered a growth of 16.1% over a volume of 0.41 MMT in the month of September 2021.Road constructions activity gained momentum during the month.

7. Kerosene (SKO) consumption with a volume of 0.041 MMT registered a de-growth of 68.9% in September 2022 as compared to September 2021. SKO consumption during the month is largely constituted by PDS category 0.027 MMT followed by non PDS SKO 0.014 MMT. Nil sales has been registered in nonsubsidised PDS SKO category.

8. Average percentage of ethanol blending in petrol (EBP) marked 9.12% in September-2022. Around 33.98 cr litre ethanol has been blended in petrol under EBP program.

9. Total Natural Gas Consumption (including internal consumption) for the month of September 2022, with a volume of 5.2 BCM, recovered 91.2% to a volume of 5.7 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 September 2022. Data on product-wise monthly consumption of petroleum products for September 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.

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

Product	September				April-September		
	% share	2021-22	2022-23	Growth (%)	2021-22	2022-23	Growth (%)
A) Sensitive Products							
LPG	**14.2**	2363	2447	**3.6**	13583	13812	1.7
SKO	**0.2**	132	41	**-68.9**	769	281	-63.4
Sub Total	**14.5**	**2495**	**2488**	**-0.3**	**14352**	**14093**	**-1.8**
(B) Major Decontrolled Product							
HSD	**36.4**	5516	6255	**13.4**	35665	41398	**16.1**
MS	**16.5**	2598	2827	**8.8**	**14706**	**17422**	**18.5**
Naphtha	**6.3**	1149	1076	**-6.3**	5774	6388	**10.6**
ATF	**3.4**	409	592	**44.7**	2040	3511	**72.1**
Bitumen	**2.8**	408	473	**16.1**	3218	3549	**10.3**
FO/LSHS	**3.4**	544	593	**9.0**	2956	3349	**13.3**
Lubes+Greases	**2.2**	381	385	**1.0**	2070	2147	**3.7**
LDO	**0.4**	85	63	**-26.9**	514	353	**-31.2**
Sub Total	**71.4**	**11090**	**12264**	**10.6**	**66943**	**78117**	**16.7**
(C) Other Minor Decontrolled Products							
Pet.Coke	**7.7**	1030	1319	**28.1**	**5454**	6484	7670
Others*	**6.5**	1275	1109	**-13.1**	**4729**	6004	7846
Sub Total	**14.1**	**2305**	**2428**	**5.3**	**10183**	**12488**	**22.6**
Total	**100.0**	**15889.4**	**17179.2**	**8.1**	**91479**	**104699**	**14.5**

**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 Apr-Aug'22, which may undergo change on receipt of actual data), and

(c) sales by SEZ units in Domestic Tariff Area (DTA)

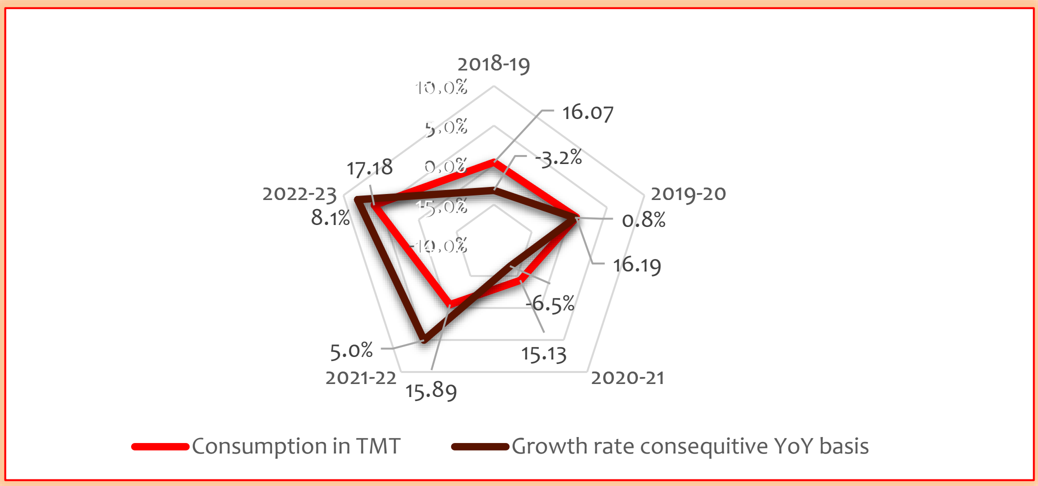
PPAC analyses the sales recorded by the industry and domestic sales by SEZ units based on available data. Data on direct private imports are received from DGCIS, which is added to the final sales reported by oil companies and domestic sales by SEZ units, for estimation of consumption figures.

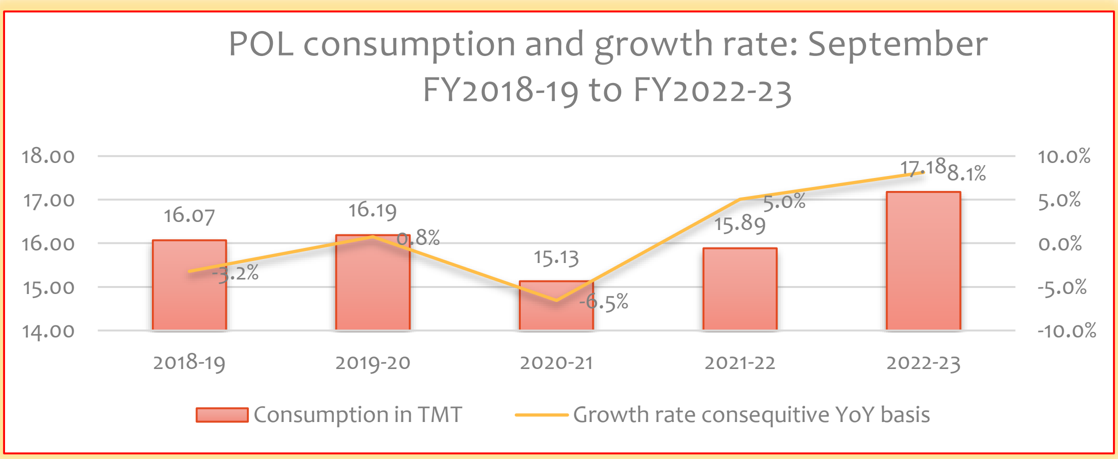
Overall consumption of all petroleum products in September 2022 with a volume of 17.2 MMT registered a growth of 8.1% on volume of 15.9 MMT in September 2021. The products which registered a growth in the month of September 2022 were High Speed Diesel (HSD) 13.4%, Petrol (MS) 8.8%,Aviation Turbine Fuel (ATF) 44.7%, Furnace Oil & Low Sulphur Heavy Stock (FO/LSHS) 9%,Bitumen 16.1%, Pet coke 28.1%, Liquified Petroleum Gas (LPG) 3.6% and Lubes & Greases 1% while the products which registered de-growth during the month were Light Diesel Oil (LDO) 26.9% and Kerosene (SKO) 68.9%, naphtha 6.3% and products categorised under "Others" category 13.1% during the current month as compared to September 2021.

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

The overall POL consumption profile during September-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 September in FY 2018-19 to FY2022-23 and its corresponding growth rate on YoY basis.

Chart-1: POL consumption & Growth rate YoY basis: radar plot with bar chart





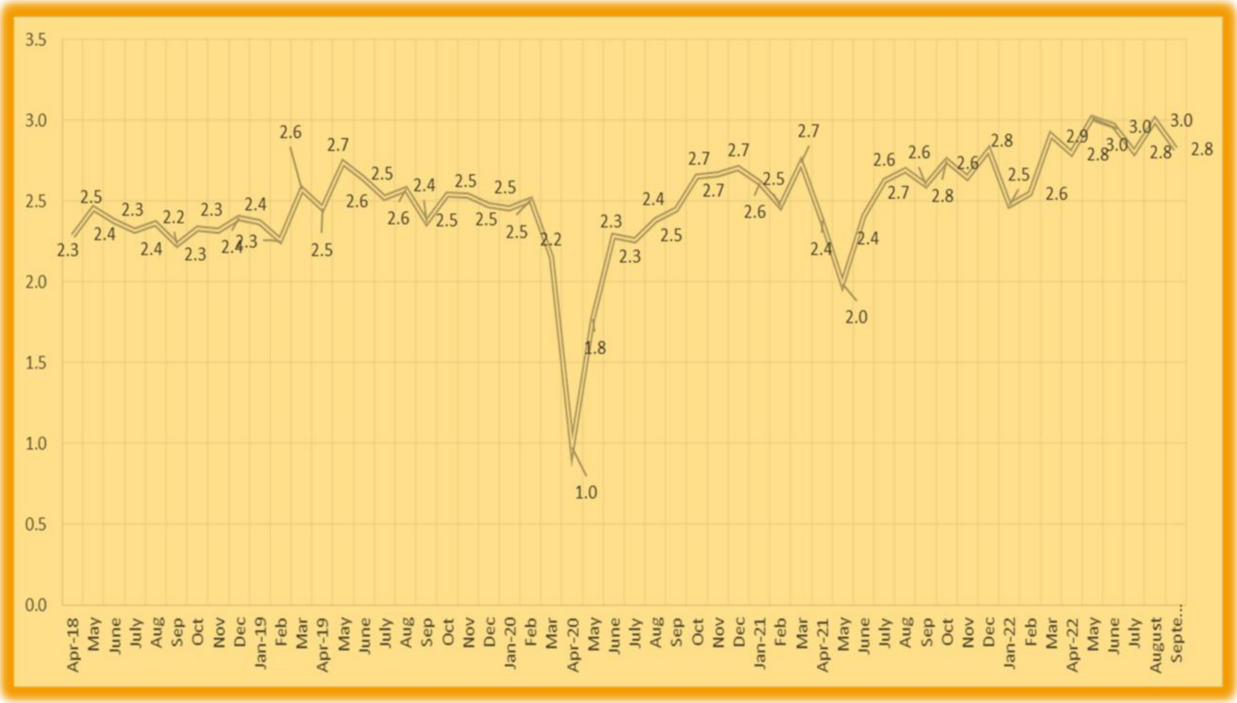
PETROL/MOTOR SPIRIT (MS):

MS (Petrol) consumption during the month of September 2022 with a volume of 2.8 MMT registered a growth of 8.8%,15.3%,19.2% and 26.6% over the volume of 2.6 MMT, 2.5MMT, 2.4MMT & 2.2MMT in September 2021, 2020, 2019 & 2018 respectively.

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

- Economic activity went up for nearing festival season and ending monsson session.
- Tourism dependent states saw heavy influx of travelers during the month giving a boost to economic activities.
- Running of full fledged schools, colleges & offices increases mobility accounting for higher MS consumption during the month.

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



OTHER FACTORS IMPACTING CONSUMPTION OF MS:

PASSENGER VEHICLE SALES:

The Sale of Passenger Vehicles in September 2022 at 2.6 lacs recorded growth of 9.7% YoY over sale of 2.4 lacs in the month of September 2021. 'Passenger vehicle' sales have been driven by demand for 'passengers cars.'

Passenger cars and utility vehicles recorded a growth of 9.7%, 76.5% respectively during the current month as compared to the same period previous year.

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

Vehicle Segment	September		
	2021-22	2022-23	Growth %age
Passenger Cars	237,502	260,556	9.7
Utility Vehicles	18,459	32,574	76.5
Total PV	255,961	293,130	14.5

Source: various companies' press release

TWO-WHEELER SALES:

Two-wheeler sales in September 2022 with a volume of 10.2 lacs recorded a growth of 9% on a month-on-month basis over volume of 9.31 lacs during September 2021.

Scooters/ Scootertte & Motorcycle sales recorded appreciable growth rate during the month.

Table-3: Two & Three Wheelers vehicle sales in the month of September 2022

Vehicle Segment	September		
	2021-22	2022-23	Growth %age
Two wheeler sales	931,666	1,015,702	9.0
Three wheeler sales	37,172	63,915	71.9

Source: various companies' press release

THREE-WHEELER SALES:

Three-wheeler domestic sales in September 2022 with a volume of 0.63 lac recorded a growth of 71.9% on a-month-on-month basis over volume of 0.37 lac during September 2021.

HIGH SPEED DIESEL (HSD):

HSD (Diesel) consumption during the month of September 2022 with a volume of 6.3 MMT recorded a growth of 13.4%, 14%, 7.2% & 3.8% over a volume of 5.51MMT, 5.48 MMT , 5.83MMT & 6.03 MMT in the month of September 2021,2020 ,2019 & 2018 respectively.

Factors affecting diesel consumption during September 2022 are as follows:

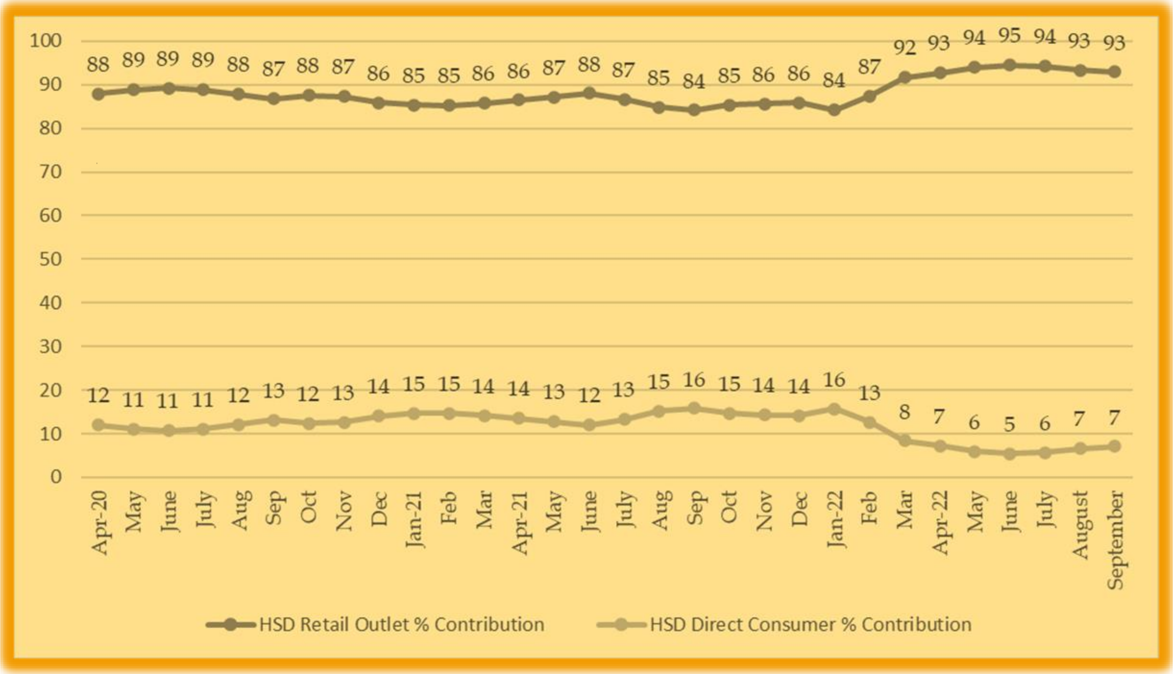
- Economic activity went up for nearing festival season and ending monsson session.
- Pick up in agricultural activity and end of monsson rain ramed up diesel consumption in irrigation, pumps and tractor mobility.
- Harvest seasons in some states of the country accounted for higher consumption of HSD

IHS Markit Manufacturing Purchasing Manager's Index (PMI) marked at 55.1 in September 2022 historically high, despite lower by few percentage pints from August-22.

HDS market share in direct and retail sales is shown in the Figure-4.

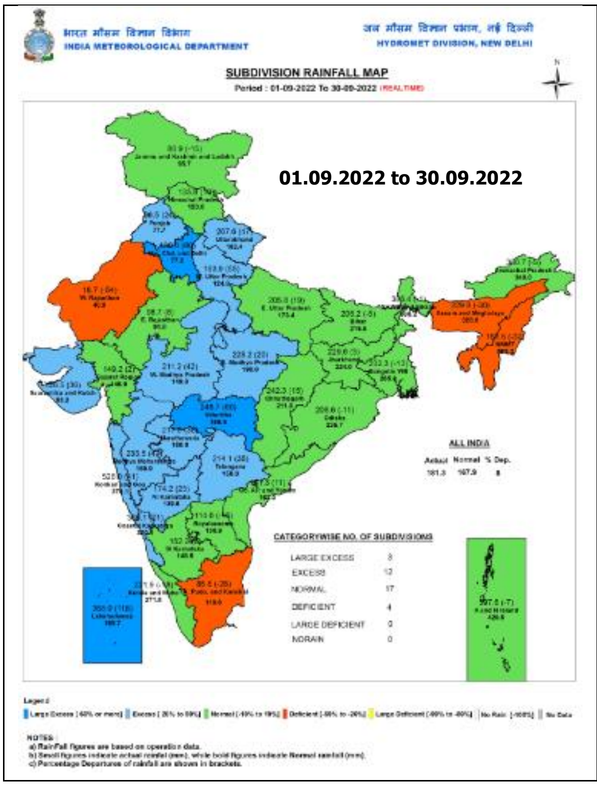
Figure-3: Month-wise HSD consumption (MMT) since September 2018

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



OTHER FACTORS IMPACTING CONSUMPTION OF HSD:

Seasonal rainfall scenario: The rainfall in the country during September 2022 was 8% above normal precipitation. A rainfall of 181.3 mm was recorded in the month of September 2022 as against a normal reading of 167.9 mm. Out of total 36 subdivisions, 15 divisions received excess to large excess rainfall, 17 divisions received deficient rainfall whereas 4 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 30.8% in domestic sales of commercial vehicles during the month of September 2022 as compared to September 2021. 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 September 2022 has registered a growth rate of 0.9% as compared to sales in September 2021. Downward revision in quarter end output growth projection may affect the tractor sales during the month September-2022.

Port Traffic:

The traffic handled at major ports in India with a volume of 62 MMT in September 2022 recorded a growth of 14.9% on volume of 54 MMT in the month of September 2021.

Growth was observed in cargo handled during the month of September 2022 in all the major ports like Visakhapatnam 29.5%, Paradop 28.5%, Kolkata & Haldia 24.4%, Mumbai 23.6%, Deendayal 18.9%, Mormugao 17%, JNPT 9.5%, New Mangalore 4.2%, with respect to September-2021.

During the period April to September 2022, along with cumulative growth of 10.1%, sector wise growth was registered in coal (thermal, steam and coking) 53.7%, miscellaneous cargo 20.9%, 'Crude & Petroleum Oil & lubricants' (CPOL) 12.4%, containers tonnage 2.6% and containers TEU 4% with respect to September-2021. So far as commodity-wise cargo handling is concerned, the percentage share of CPOL was maximum i.e. 30%, followed by coal 18%, container-tonnage 21%, other miscellaneous cargo 12%, other liquids 12%, iron ore & pellets 5%, and fertilizer 2%.

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

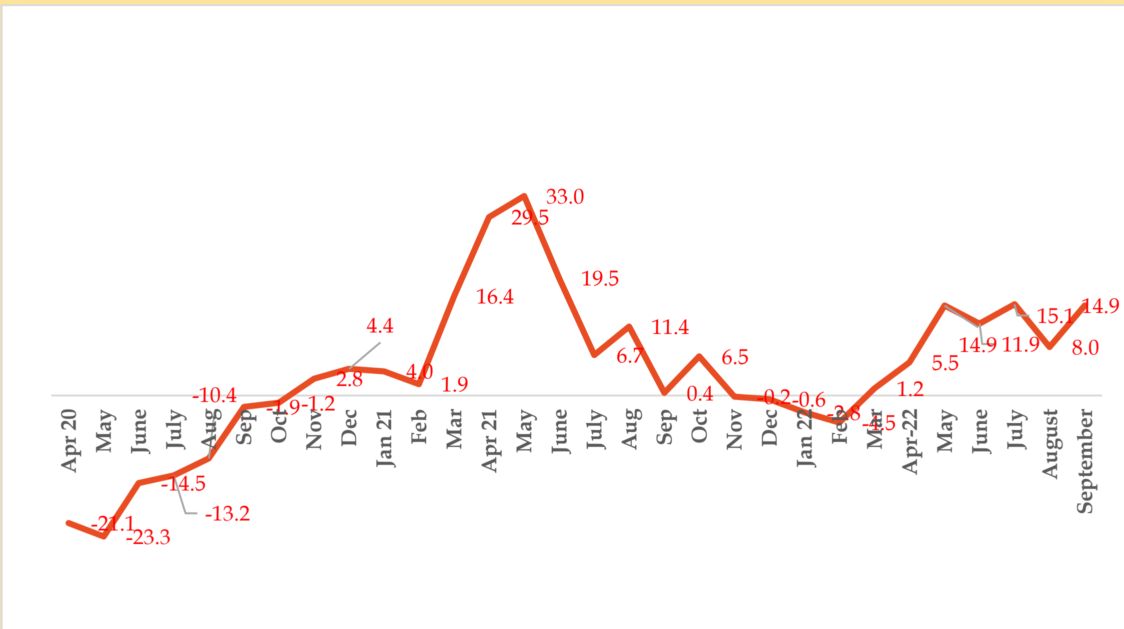


Table-4: Traffic handled at major ports in September 2022(Qty in TMT)

Ports	September 2021	September 2022	Growth (%)
Kolkata & Haldia	4,228	5,259	24.4
Paradip	7,277	9,349	28.5
Visakhapatnam	4,808	6,227	29.5
Kamarajar (Ennore)	3,026	2,814	-7.0
Chennai	3,836	4,153	8.3
V.O. Chidambaranar	42,962	3,074	3.8
Cochin	3,168	2,573	-18.8
New Mangalore	2,648	2,758	4.2
Mormugao	1,005	1,176	17.0
Mumbai	4,488	5,548	23.6
JNPT	5,904	6,465	9.5
Deendayal	10,322	12,273	18.9
Total:	53,672	61,669	14.9

Source: ipa.nic.in

Power situation:

The position of power supply for the month of August 2022 is given in Table-5. As per the data reported, power deficit position had reduced to -0.4% in September-2022 as compared to -0.6% in the month of September 2021. The requirement of power in September 2022 was 1,35,720 MU has recorded a growth of 1.7% over requirement of power at 1,28,519 MU in the month of September 2021.

Table-5: Power supplied and deficit for August 2022

	August-2021			August-2022		
	Requirement	Supplied (MU)	Deficit %	Requirement	Supplied (MU)	Deficit %
North	44,175	43,740	-1.0%	45,839	45,634	-0.4%
West	36,478	36,405	-0.2%	35,989	35,985	0.0%
South	30,595	30,578	-0.1%	29,969	29,962	0.0%
East	15,533	15,422	-0.7%	16,943	16,730	-1.3%
North-East	1,737	1,736	-0.1%	1,980	1979	-0.1%
Total	128,519	127,881	-0.5%	130,720	130,290	-0.3%

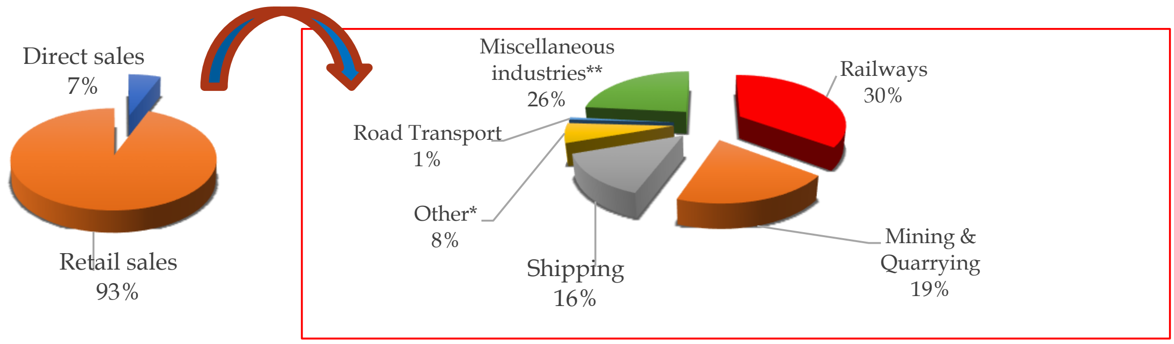
Source: Central Electricity Authority (CEA)

Sectoral consumption of HSD:

The cumulative diesel sale during April-Sseptember-2022 was 41.4 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 30% followed by Miscellaneous industries 26%, Mining & Quarrying 19%, Shipping 16%, other 9% and road transport 2%. Most of the retail sales are consumed in road transport.

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

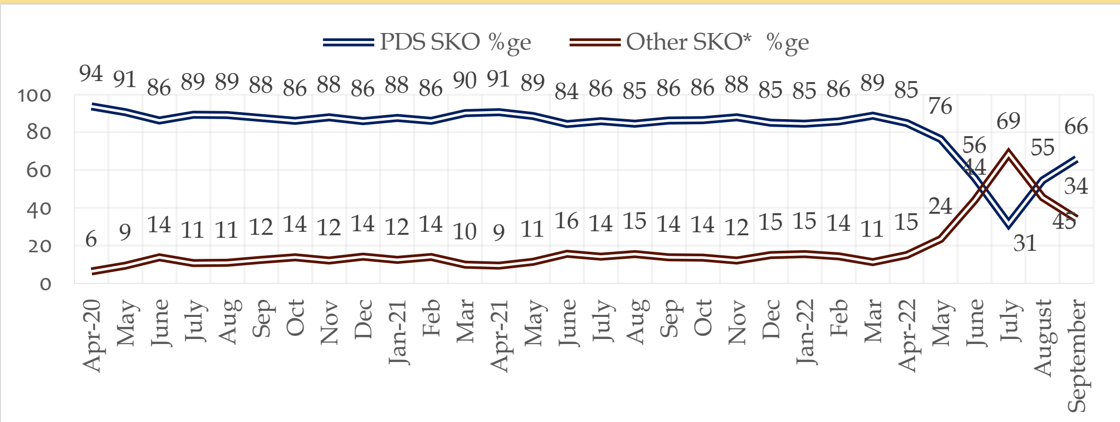


*Other: power/agriculture and metallurgy **Miscellaneous: Elec./Electronics, Mechanical, Fertilizers, Textiles, cement, ceramics, chemical, aluminum &civil etc.

KEROSENE:

Kerosene consumption during September-2022 with a volume of 0.041MMT registered a de-growth of 68.9%, 75.4%, 76.7% & 85.5% as compared to September 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 Bihar and Tamil Nadu. In non-PDS category Ladakh was the biggest consumer followed by Tamil Nadu and Jammu & Kashmir. The market share of subsidized-PDS and other SKO was 66% & 34% respectively.

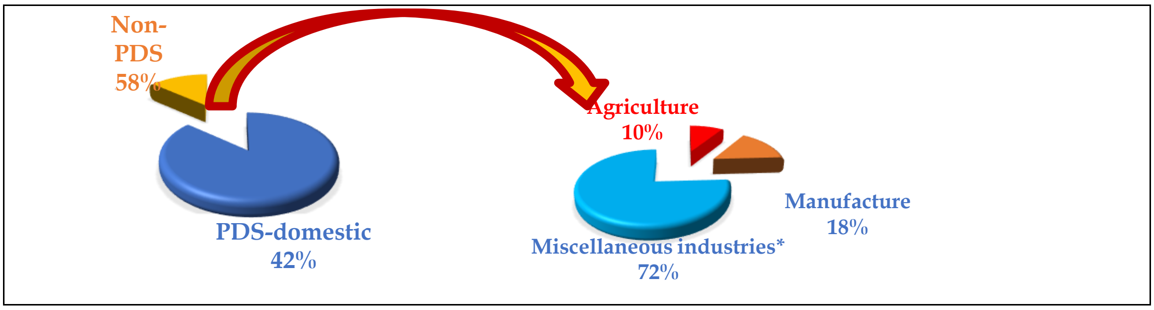
Figure-6: Month-wise PDS & other-SKO consumption in share (%) since September 2020



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

Sectoral consumption of SKO:

Out of total SKO sales during April-September-2022 with a volume of 0.28 MMT 'PDS domestic SKO' upliftment constituted to 58%. So far as SKO sales in 'non-PDS commercial sector is concerned,' 72% accounted to miscellaneous industries followed by manufacture 18% and agriculture 10% as shown in 6A/B chart.



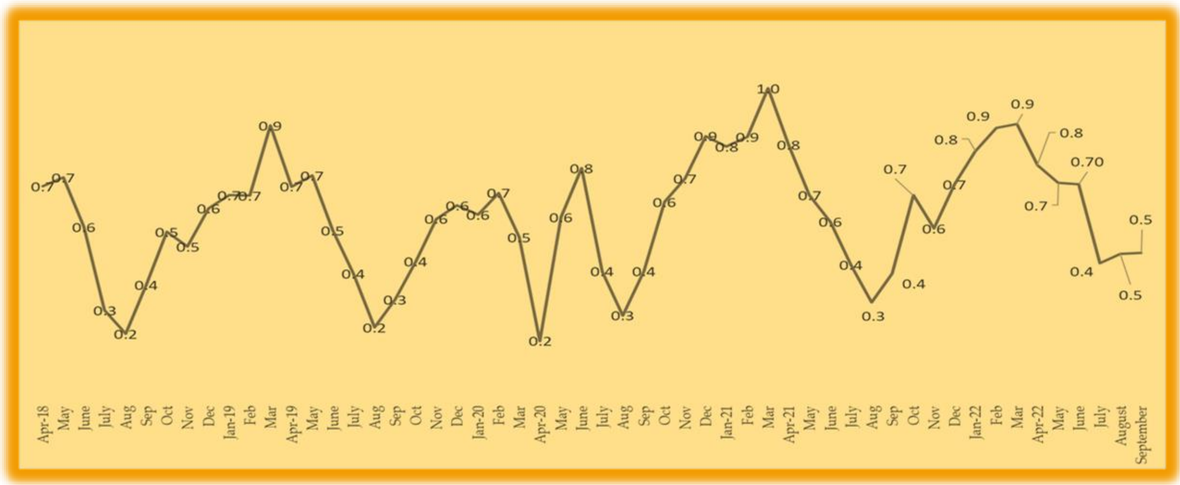
**Miscellaneous industries include aviation, mining, road transport, shipping, power generation, railways, and resellers

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

BITUMEN:

Bitumen consumption during September 2022 with a volume of 0.47 MMT recorder a growth of 16.1%, 14%, 47.6% & 27.9% over a volume of 0.41,0.42,0.32 & 0.37 MMT on a year-on-year basis in the month of September-2021,2020, 2019 & 2018 respectively. Significant upturn in road construction projects was observed since November-2021. Road construction activity was ramped up during the month to mitigate the targets.

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



Sectoral consumption of Bitumen:

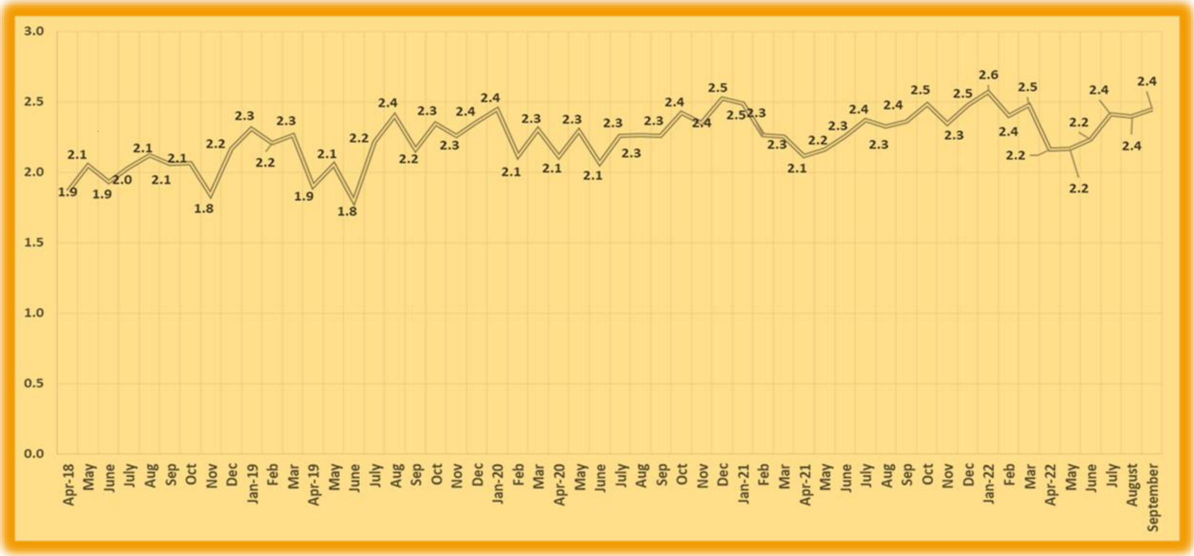
Cumulative bitumen sales during April-September-2022 marked a volume of 3.2 MMT of which 97% was constituted to Road construction, balance 3% was consumed by miscellaneous industries.

LPG:

LPG consumption during the month of September 2022 with a volume of 2.44MMT registered a growth of 3.6%, 8.2% , 13.1% & 18.8% over the volume of 2.36 MMT, 2.26MMT, 2.16MMT& 2.06MMT in the month of September 2021, 2020, 2019 & 2018 respectively.

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

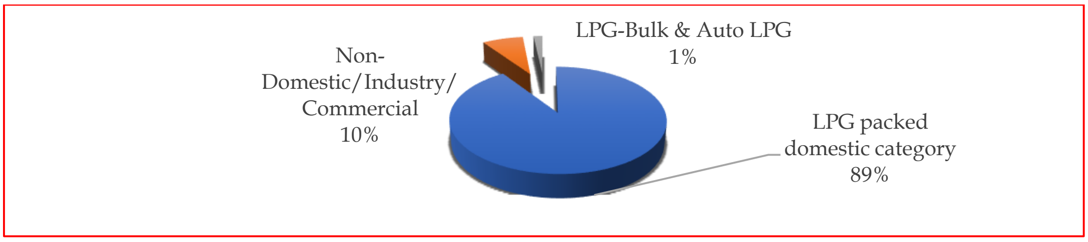
Figure-8: Month-wise LPG consumption (MMT) since September 2018



Sectoral consumption of LPG:

In April-September-2022 total LPG sale was 13.8 MMT driven by packed domestic category 89% followed by 'non-domestic/industry/commercial sector 10% as shown in 8A chart.

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



NAPHTHA:

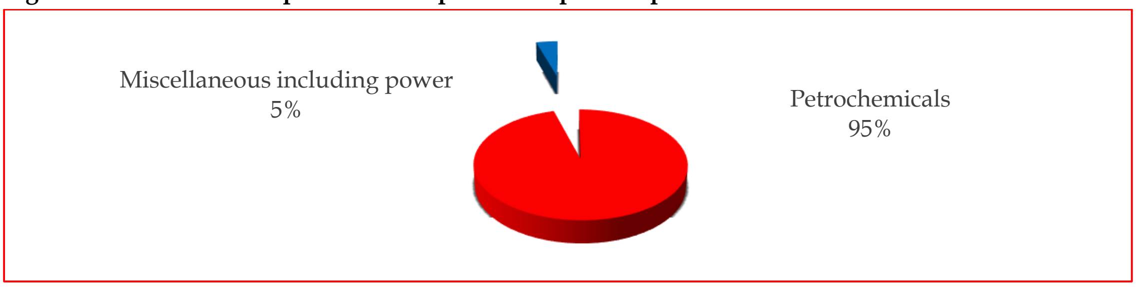
Naphtha consumption during the month of September 2022 with a volume of 1.1MMT recovered 93.7%,96%,97.7% and 94.5% over the volume of 1.14MMT, 1.12 MMT, 1.10MMT & 1.13 MMT in September2021, 2020, 2019& 2018 respectively.

Petrochemical industries remain the main consumers of naphtha.

Sectoral consumption of Naphtha:

Consumption of naphtha during April-September-2022 with a volume of 6.4MMT was driven by petrochemicals sector 95%, whereas 5% naphtha consumption fell in 'miscellaneous industries including power' as shown in 8A chart.

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



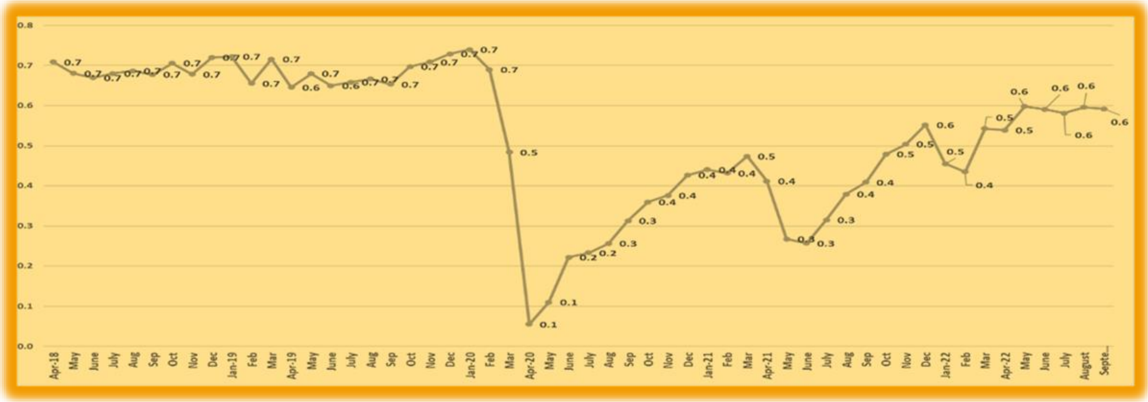
ATF:

ATF consumption during September 2022 with a volume of 0.6 MMT registered a growth of 44.7% over the volume of 0.4 MMT in September 2021. The higher growth figures are outcome of covid induced low base factor in the denominator.

The domestic footfall is back to be comparable with per-Covid levels, however, international traffic footfall is lagging because of continued

Month wise ATF consumption since September-2018 is depicted in the Figure-9.

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

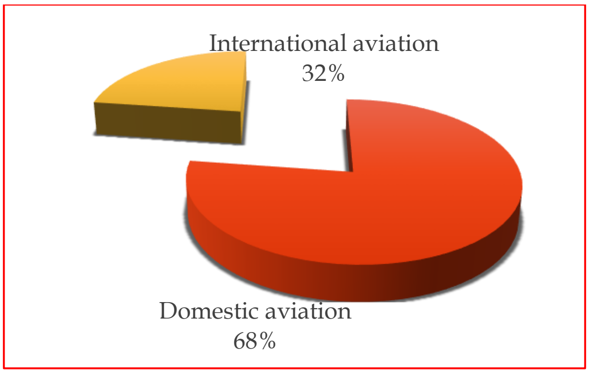


International air travel continued to emerge during the month.

Sectoral consumption of ATF:

Almost entire ATF consumption during April-September-2022 with a volume of 3.5 MMT, attributed to aviation sector;68% domestic & 32% international aviation as shown in the chart.

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



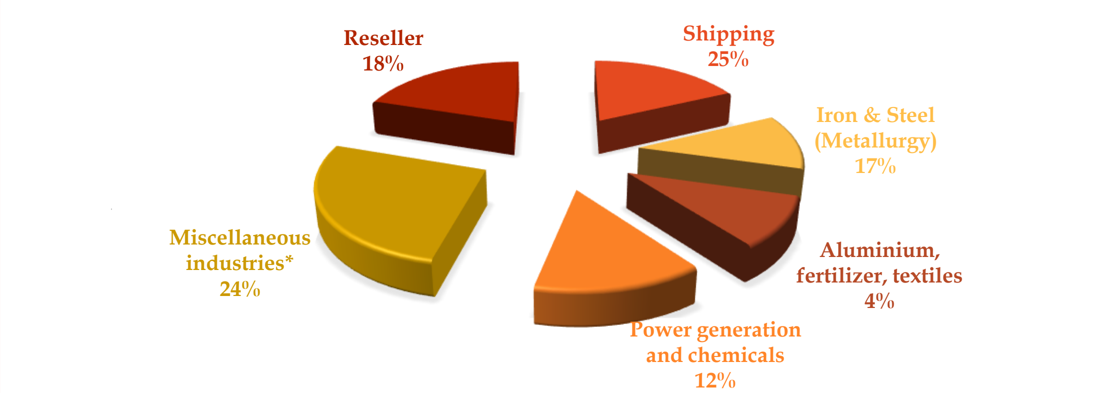
FURNACE OIL & LOW SULPHUR HEAVY STOCK (FO/LSHS):

FO/LSHS consumption during September 2022 with a volume of 0.6 MMT recorded a growth rate of 9%, 31.1% 11.7% & 8.6% year-to-year basis over volume of 0.54 MMT, 0.45MMT, 0.53MMT, 0.55 MMT in the month of September 2021, 2020, 2019 & 2018 respectively. The higher growth rate for the consumption is attributed to higher replacment internal use from gas in refining and chemical sector.

Sectoral consumption of FO/LSHS:

Consumption of FO/LSHS during April-September-2022 with a volume of 3.3 MMT was driven by 'shipping' 25%, followed by 'Miscellaneous industries' 24% Reseller 18%& 'Iron & steel (metallurgy)' 17% , 'Power generation and chemicals' 12% and 'Aluminum, fertilizer& textiles' 4% as shown in the chart.

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



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

PETCOKE:

Petcoke consumption during the month of September 2022 with a volume of 1.3 MMT recorded a growth of 28.1% & 19% over volume of 1.03 & 1.12MMT in the month of September 2021,2020 respectively. However, it recovered to 75.1% and 89.8% on year-to-year basis over a volume of 1.8 MMT & 1.5MMT in September-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-September-2022 was of 7.7MMT. The domestic sales driven by 'cement industries' 52% followed by 'miscellaneous industries' 31%, as shown in the chart.

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

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

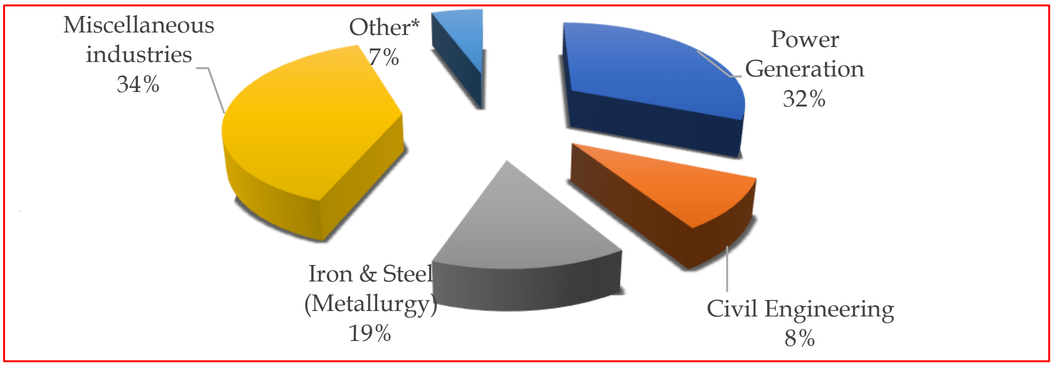
LIGHT DIESEL OIL:

LDO consumption during the month September-2022 with a volume of 0.063 MMT recovered 73.1% & 95.8% on year-to-year basis over a volume of 0.085 MMT & 0.065MMT in the month of September 2021 & 2020 respectively. However, it registered growth rate of 4.1% & 40.2% over a volume of 0.06MMT, 0.045MMT in the month September-2019 &2018 respectively.

Sectoral consumption of Light Diesel Oil:

During April-September-2022, consumption of Light Diesel oil (LDO) with a volume of 0.353MMT was driven by 'miscellaneous industries' 34% & 'Power Generation' 32% followed by 'Iron & steel (metallurgy) 19% and 'other' 7% as shown below sectoral consumption pie-chart.

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



*Other includes ceramic, aluminum, textiles, mining etc.

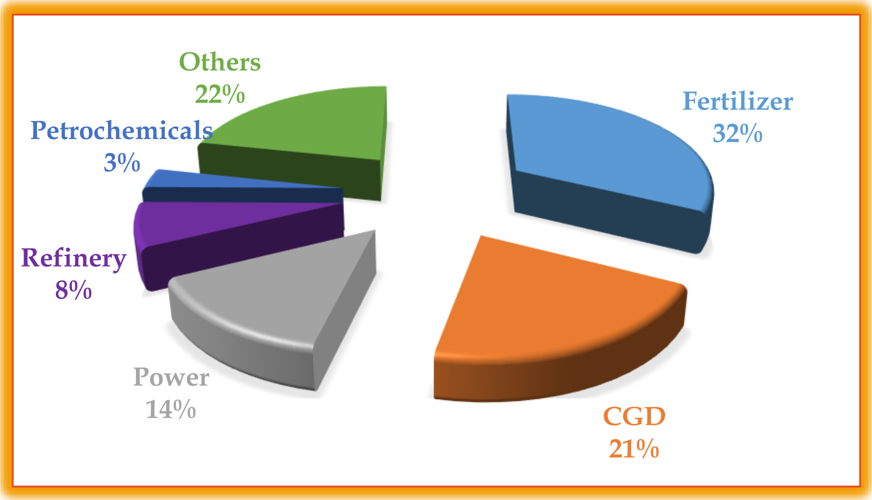
NATURAL GAS:

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 5.2 BCM (billion cubic meters) during the month of September 2022 recovered 91.2 % on volume of 5.7 BCM in the month of September 2021.

Sectoral consumption of Natural Gas April-August-22: (PROVISIONAL)

During April-August-2022, consumption of Natural gas (NG) with a volume of 25 BCM was driven by the fertilizer (32%) followed by CGD (21%), others (22%) power (14%) and Refinery (8%).

Figure-12: Sector wise consumption of Natural Gas for April-August 2022 (P)



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

Source: GAIL and PPAC data; P: provisional

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)						
						('Million barrels per day)
Product	April-September			September		
	2021-22	2022-23	Growth(%)_2021-22 to 2022-23	2021	2022	Growth(%)_2021 to 2022
(A) Sensitive Products						
LPG	1.03	1.05	1.7	0.88	0.92	3.6
SKO	0.04	0.01	-63.4	0.03	0.01	-68.9
Sub Total	1.07	1.06	-0.8	0.92	0.93	0.9
(B) Major Decontrolled Product						
HSD	1.77	2.06	16.1	1.35	1.54	13.4
MS	0.85	1.01	18.5	0.74	0.81	8.8
Naphtha	0.33	0.36	10.6	0.32	0.30	-6.3
ATF	0.11	0.19	72.1	0.11	0.15	44.7
Bitumen	0.13	0.14	10.3	0.08	0.09	16.1
FO/LSHS	0.13	0.15	13.3	0.12	0.13	9.0
Lubes+Greases	0.10	0.10	3.7	0.09	0.09	1.0
LDO	0.02	0.02	-31.2	0.02	0.01	-26.9
Sub Total	3.44	4.03	16.9	2.84	3.13	10.3
Sub - Total (A) + (B)	5	5	12.7	3.75	4.05	8.0
(C) Other Minor Decontrolled Products						
Pet.Coke	0.29	0.28	-5.7	0.03	0.04	28.1
Others*	0.40	0.41	4.2	0.04	0.04	-13.1
Sub Total	0.69	0.69	0.0	0.07	0.08	5.3
Total	5	6	11.0	3.83	4.13	8.0

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

Industry Consumption Trend Analysis 2022-23 (Provisional)

('000 MT)

Product	April- September			September								
	2021-22	2022-23	Growth(%)_2021-22 to 2022-23	2018	2019	2020	2021	2022	Growth(%)_ 2018 to 2022	Growth(%)_ 2019 to 2022	Growth(%)_ 2020 to 2022	Growth(%)_ 2021 to 2022
(A) Sensitive Products												
LPG	13583	13812	1.7	2060	2164	2261	2363	2447	18.8	13.1	8.2	3.6
SKO	769	281	-63.4	283	176	167	132	41	-85.5	-76.7	-75.4	-68.9
Sub Total	**14352**	**14093**	**-1.8**	**2343**	**2340**	**2428**	**2495**	**2488**	**6.2**	**6.3**	**2.5**	**-0.3**
(B) Major Decontrolled Product												
HSD	35665	41398	16.1	6027	5838	5487	5516	6255	3.8	7.2	14.0	13.4
MS	**14706**	**17422**	**18.5**	2233	2372	2451	2598	2827	**26.6**	**19.2**	**15.3**	**8.8**
Naphtha	5774	6388	10.6	1139	1102	1120	1149	1076	-5.5	-2.3	-4.0	-6.3
ATF	2040	3511	72.1	677	653	313	409	592	-12.6	-9.4	89.1	44.7
Bitumen	3218	3549	10.3	370	321	415	408	473	27.9	47.6	14.0	16.1
FO/LSHS	2956	3349	13.3	546	531	452	544	593	8.6	11.7	31.1	9.0
Lubes+Greases	2070	2147	3.7	274	311	396	381	385	40.4	23.9	-2.9	1.0
LDO	514	353	-31.2	45	60	65	85	63	40.2	4.1	-4.2	-26.9
Sub Total	**66943**	**78117**	**16.7**	**11311**	**11188**	**10700**	**11090**	**12264**	**8.4**	**9.6**	**14.6**	**10.6**
Sub - Total (A) + (B)	**81295.4**	**92210.8**	**13.4**	**13653.4**	**13527.8**	**13127.7**	**13584.6**	**14751.7**	**8.0**	**9.0**	**12.4**	**8.6**
(C) Other Minor Decontrolled Products												
Pet.Coke	6484	7670	18.3	1469	1756	1108	1030	1319	-10.2	-24.9	19.0	28.1
Others*	6004	7846	30.7	944	906	894	1275	1109	17.5	22.4	24.1	-13.1
Sub Total	**12488**	**15516**	**24.2**	**2413**	**2661**	**2002**	**2305**	**2428**	0.6	-8.8	21.2	5.3
Total	**93783**	**107726**	**14.9**	**16066**	**16189**	**15130**	**15889**	**17179**	6.9	6.1	13.5	8.1

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

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