



Petroleum Planning & Analysis Cell

Ministry of Petroleum & Natural Gas, Government of India



**INDUSTRY CONSUMPTION REPORT-POL & NG,
OCTOBER 2022**

Contents

Industry Consumption Report-POL & NG, OCTOBER 2022	1
Highlights of the month:.....	6
Petrol/Motor Spirit (MS):	10
Other factors impacting consumption of MS:	11
High Speed Diesel (HSD):	12
Other Factors impacting consumption of HSD:	13
Kerosene:	16
Bitumen:	17
LPG:	17
Naphtha:	18
ATF:	19
Furnace oil & Low sulphur heavy stock (FO/LSHS):	19
Petcoke:	20
Light Diesel Oil:	20
Natural Gas:	21



वितरण CIRCULATION:

पेट्रोलियम और प्राकृतिक गैस मंत्रालय:	MoP&NG:
<p>निजी सचिव- माननीय मंत्री - (पेट्रोलियम और प्राकृतिक गैस)</p> <p>ओ एस डी- माननीय मंत्री - (पेट्रोलियम और प्राकृतिक गैस)</p> <p>निजी सचिव- माननीय राज्य मंत्री - (पेट्रोलियम और प्राकृतिक गैस)</p> <p>सचिव, पीएनजी</p> <p>अपर सचिव, पीएनजी</p> <p>अपर सचिव एवं वित्त सलाहकार</p> <p>संयुक्त सचिव (रिफाइनरी)</p> <p>संयुक्त सचिव (मार्के.)</p> <p>संयुक्त सचिव (जीपी)</p> <p>संयुक्त सचिव (जी)</p> <p>उप महानिदेशक, (इ एवं एस)</p> <p>संयुक्त सचिव (आईएफडी)</p> <p>संयुक्त सचिव (आईसी)</p> <p>डी जी एच: महानिदेशक (डी जी एच)</p> <p>ओ आई डी बी : सचिव (ओ आई डी बी)</p> <p>नीति आयोग: सलाहकार (ऊर्जा), नीति आयोग</p> <p>उद्योग:</p> <p>अध्यक्ष, आईओसी, / ओएनजीसी, नई दिल्ली</p> <p>अध्यक्ष एवं प्रबंधक निदेशक- बीपीसी/एचपीसी/गेल</p> <p>निदेशक (मार्के.), आईओसी/ बीपीसी/ एचपीसी/ गेल</p> <p>प्रेजिडेंट, आरआईएल / एमडी और सीईओ, एच एम ई एल / सीईओ (मार्के.) नयारा एनर्जि</p> <p>महानिदेशक, फिपी</p> <p>प्रबंध निदेशक-एनआरएल, गुवाहाटी/सीपीसीएल,</p> <p>चेन्नई/एमआरपीएल, मंगलुरु</p> <p>ओएमसी योजना एवं रिटेल ग्रुप – एचओ</p>	<p>PS to Hon'ble Minister (P&NG)</p> <p>OSD to Hon'ble Minister (P&NG)</p> <p>PS to Hon'ble Minister of State (P&NG)</p> <p>Secretary, P&NG</p> <p>Additional Secretary, P&NG</p> <p>Additional Secretary & Financial Advisor</p> <p>Jt. Secretary (Refinery)</p> <p>Jt. Secretary (Marketing)</p> <p>Jt. Secretary (GP)</p> <p>Jt. Secretary (G)</p> <p>Deputy Director General (E&S)</p> <p>Jt. Secretary (IFD)</p> <p>Jt. Secretary (International Cooperation)</p> <p>DGH: DG, DGH</p> <p>OIDB: Secretary (OIDB)</p> <p>NITI Aayog: Advisor (Energy), NITI Aayog</p> <p>Industry:</p> <p>Chairman, IOC / ONGC New Delhi</p> <p>C&MD - BPC / HPC / GAIL</p> <p>Director (Mkt.), IOC/ BPC / HPC /GAIL</p> <p>President - RIL, MD & CEO - HMEL, CEO (Mktg.) - Nayara</p> <p>DG, FIPI</p> <p>MD- NRL, Guwahati/ CPCL, Chennai/ MRPL, Mangalore</p> <p>OMCs Planning & Retail Groups - HO</p>

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: October 2022

October-22 POL consumption in India marked 18.4 MMT is highest 'October consumption' with respect to YoY consumption data in the last decade.

IHS Markit Manufacturing Purchasing Manager's Index (PMI) marked at 55.3 in October 2022 from 55.1 from September-22, once again proving emerging economic pace.

The crude supply to India remained flexible & the average crude price for Indian Basket in October-22 hinged around USD91.7/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 - October 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

अक्टूबर -22 भारत में पीओएल की खपत 18.4 एमएमटी दर्ज की गई, हालांकि यह इस वित्तीय वर्ष में पिछले कुछ महीनों के दौरान भारी पीओएल मांग की तुलना में कुछ प्रतिशत कम है; लेकिन PPAC ने इसे पिछले दशक में YoY खपत डेटा के संबंध में उच्चतम 'अक्टूबर खपत' के रूप में घोषित किया है।

आईएचएस मार्किट मैनुफैक्चरिंग परचेजिंग मैनेजर्स इंडेक्स (पीएमआई) अक्टूबर 2022 में 55.3 पर चिह्नित किया गया, जो सितंबर-22 से 55.1 था, जो एक बार फिर उभरती आर्थिक गति को साबित करता है।



"October-22 POL consumption is the highest historical 'October consumption' in the last decade"

भारत में कच्चे तेल की आपूर्ति लचीली रही और सितंबर-22 में भारतीय बास्केट के लिए कच्चे तेल की औसत कीमत लगभग USD91.7/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 ऋत्विक् 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:

Prime Minister Narendra Modi launched Mission LiFE movement (Lifestyle for the Environment) at the Statue of Unity in Gujarat. The idea of LiFE was introduced by PM during COP26 in Glasgow. Mission LiFE is an India-led global mass movement that promotes an environment conscious lifestyle that focuses on 'mindful and deliberate utilisation' instead of 'mindless and destructive consumption'. This movement will impact energy use and emissions in significant manner. The Prime Minister also declared the village of Modhera as India's first 24x7 solar-powered village.

Asia's largest Compressed Bio Gas (CBG) plant in Lehragaga, Sangrur, Punjab, inaugurated by Union Minister of Petroleum & Natural Gas and Housing & Urban Affairs

Government announced comprehensive support for making the sale of flex-fuel E10 and E20 vehicles a viable business proposition for auto industry

The Goods and Services Tax collection marked Rs.1.51 lakh crore in October 2022, 16.6% higher than in October 2021. GST collection exceeds Rs.1.40 lakh crore band and this is the second highest collection ever, next to April 2022 collection data.

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 9.53% till October-2022.

The average FOB (Free on Board) price of Indian basket crude oil during the month October-2022 was USD 91.7/bbl.

The power demand in October 2022 decreased by 0.7% as compared to October 2021 and power deficit decreased to 0.1% as compared to 1.1% in the month of October 2021. The average rainfall during the month was registered at 110.8 mm with percentage of departures 47percent with respect to 'this year October normal rainfall value' of 75.4 mm. Traffic at major ports during the month of October 2022 recorded a YoY growth 3.6% of the volumes in the month of October 2021.

The growth percentage in consumption of petroleum products, category-wise, for the month of October 2022 is given in Table-1.

SUMMARY OF PRODUCT WISE POL CONSUMPTION PROFILE FOR OCTOBER-22

1. The consumption of petroleum products in October 2022 with a volume of 18.4 MMT recorded a growth of 3.4% on volume of 17.76 MMT in October 2021, 3.6% growth on volume of 17.72 MMT in October 2020, 5.9% growth on volume of 17.34 MMT in October 2019 and 4% growth on volume of 17.72 MMT in October 2018. The economic momentum is under acceleration with appreciable growth rate.
2. MS (Petrol) consumption during the month of October 2022 with a volume of 3 MMT (0.86 million barrels per day, mbpd) recorded a growth of 8.8% on the volume of 2.8MMT (0.79 mbpd) in October 2021.
The Sale of Passenger Vehicles in October-2022 with a volume of 2.9 lacs registered a growth 28.6% over volume of 2.3 lacs during October-2021. Two-wheeler sales in October 2022 with a volume of 15.8 lacs marked 1.6% over volume of 15.5 lacs during October-2021. Three-wheeler domestic passenger vehicles touched a sales volume of 0.54 lac in October-2022 registering 70.3% YoY growth rate.
3. HSD (Diesel) consumption during the month of October 2022 with a volume of 7 MMT (1.71 mbpd) recorded a growth of 5.5% on the volume of 6.6 MMT in the month of October-21
4. LPG consumption during the month of October 2022 with a volume of 2.4 MMT recovered 96.7% over the volume of 2.5 MMT in the month of October 2021. As usual, LPG consumption during the month had been largely driven by consumption in domestic category.
5. ATF consumption during October 2022 with a volume of 0.6 MMT registered a growth of 28.5%, over a volume of 0.5 MMT during the month of October 2021.
6. Bitumen consumption during October 2022 with a volume of 0.58 MMT recovered 88.6% over a volume of 0.66 MMT in the month of October 2021. Road constructions activity gained momentum during the month.

7. Kerosene (SKO) consumption with a volume of 0.034 MMT registered a de-growth of 73% in October 2022 as compared to October 2021. SKO consumption during the month is largely constituted by PDS category 0.022 MMT followed by non PDS SKO 0.012 MMT. 24 KL sales has been registered in nonsubsidised PDS SKO category for the state of Uttar Pradesh.
8. Average percentage of ethanol blending in petrol (EBP) marked 5.68% in October-2022. Around 22.2 cr litre ethanol has been blended in petrol under EBP program. Cumulative ethanol blending percentage during 'Dec-21 to Oct-22' has been achieved at 9.53%.
9. Total Natural Gas Consumption (including internal consumption) for the month of October 2022, with a volume of 5.2 BCM, recovered 97.3% to a volume of 5.4 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 October 2022. Data on product-wise monthly consumption of petroleum products for October 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	October				April-October		
	% share	2021-22	2022-23	Growth (%)	2021-22	2022-23	Growth (%)
(A) Sensitive Products							
LPG	16064.1	2481	2400	-3.3	16064	16213	0.9
SKO	893.4	125	34	-73.0	893	315	-64.8
Sub Total	13.3	2606	2434	-6.6	16957	16528	-2.5
(B) Major Decontrolled Product							
HSD	38.0	6618	6980	5.5	42282	48381	14.4
MS	16.3	2750	2993	8.8	17457	20416	17.0
Naphtha	5.2	1260	958	-23.9	7034	7378	4.9
ATF	3.3	479	615	28.5	2519	4109	63.1
Bitumen	3.2	663	587	-11.4	3881	4136	6.6
FO/LSHS	3.1	559	564	1.0	3515	3916	11.4
Lubes+Greases	2.2	461	410	-11.2	2531	2557	1.0
LDO	0.4	90	67	-26.0	604	420	-30.5
Sub Total	71.7	12879	13174	2.3	79823	91313	14.4
(C) Other Minor Decontrolled Products							
Pet.Coke	7.3	1326	1344	1.3	7810	9014	7670
Others*	7.7	952	1418	48.9	6956	9263	7846
Sub Total	15.0	2278	2762	21.2	14766	18277	23.8
Total	100.0	17762.8	18369.3	3.4	111546	126118	13.1

*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 October 2022 with a volume of 18.4 MMT registered a growth of 3.4% on volume of 17.8 MMT in October 2021. The products which

registered a growth in the month of October 2022 were High Speed Diesel (HSD) 5.5%, Petrol (MS) 8.8%, Aviation Turbine Fuel (ATF) 28.5%, Furnace Oil & Low Sulphur Heavy Stock (FO/LSHS) 1%, products categorised under "Others" category 48.9% while the products which registered de-growth during the month were LPG 3.3%, Kerosene (SKO) 73%, Naphtha 23.9%, Light Diesel Oil (LDO) 26% and Lubes & Greases 11.2% during the current month as compared to October 2021.



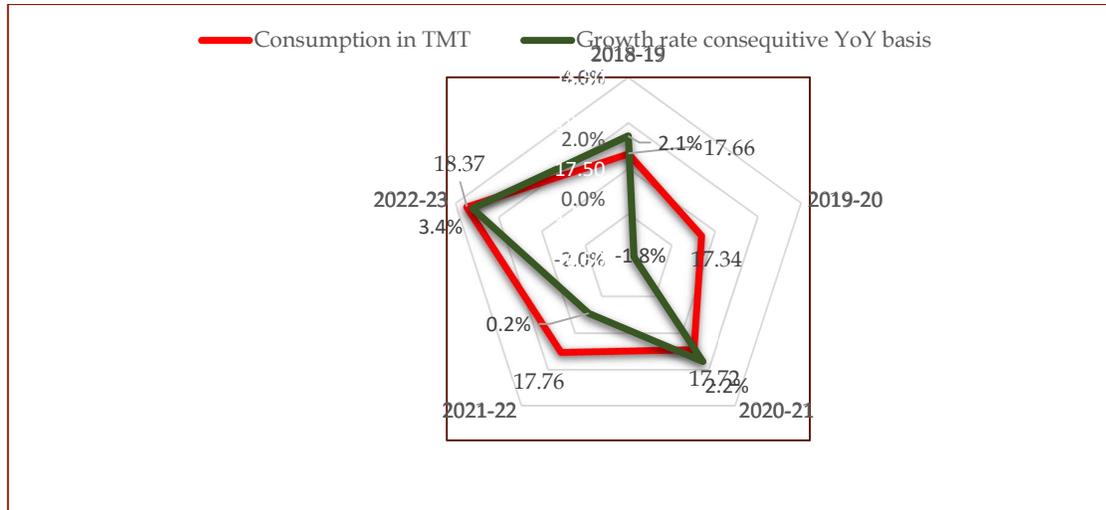
Figure-1: Monthly POL consumption (MMT) since October 2018

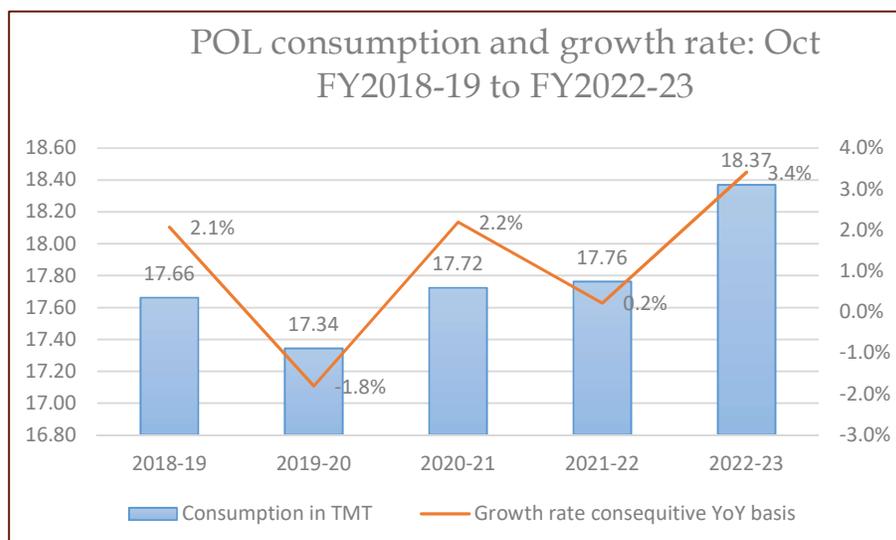


The overall POL consumption profile during October-2022 & corresponding projected growth rate were quite promising & better than pre-covid regime as found in the radar/bar chart of

comparison between total POL consumption in the month of October 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





Automobile industry reflects the sentiments of economy. In India, the Automobile sector is dominated by 2Wheeler but 4Wheeler segment is increasing its share. The growth in economy is also boosting share of heavy vehicles for passenger and freight transport. Mechanization of agriculture has resulted in growing demand for tractors and India is the largest tractor producer.

Most of these automobiles are diesel driven and this fuel constitutes 68% share of the petrol-diesel basket, with the transport segment accounting for 87% share of diesel and remaining 13% coming from non-transport segment. High contribution of road transport in total freight drives diesel demand; truck segment accounts for 64.2% share. Petrol constitutes 32% share of the petrol-diesel basket, with the highest sale to the 2W category (59%), followed by private cars (28%). (refer All-India study on sectoral demand for petrol and diesel available at

<https://www.ppac.gov.in/WriteReadData/userfiles/file/ExecutiveSummarySectoralConsumptionStudy.pdf>)

CNG as transport fuel is growing rapidly with 50% growth in last 5 years and has 3-4% share in transport fuel market. Future though is looking at electric vehicles particularly 2-3 wheelers and small passenger automobiles. This is evident from October sales of EVs hitting 1 Lakh mark. The electric two-wheeler segment dominated with registration of 68 thousand two-wheeler EVs in October.

PETROL/MOTOR SPIRIT (MS):

MS (Petrol) consumption during the month of October 2022 with a volume of 3 MMT registered a growth of 8.8%, 12.7%, 17.9% and 28.3% over the volume of 2.8MMT, 2.7MMT, 2.5MMT & 2.3MMT in October 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 monsoon 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 October 2018



OTHER FACTORS IMPACTING CONSUMPTION OF MS:

PASSENGER VEHICLE SALES:

Driven by festive season, the Sale of Passenger Vehicles in October 2022 at 2.9 lacs recorded growth of 28.6% YoY over sale of 2.3 lacs in the month of October 2021. 'Passenger vehicle' sales have been driven by demand for 'passengers cars.'

Passenger cars and utility vehicles recorded a growth of 35.7%, 26% respectively during the

current month as compared to the same period previous year.



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

Vehicle Segment	October		
	2021-22	2022-23	Growth %age
Passenger Cars	103,829	140,926	35.7
Utility Vehicles	112,112	141,254	26.0
Vans	10,412	8,933	-14.2
Total PV	226,353	291,113	28.6

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

TWO-WHEELER SALES:

Two-wheeler sales in October 2022 with a volume of 15.8 lacs recorded a growth of 1.6% on a month-on-month basis over volume of 15.5 lacs during October 2021. Scooters/ Scooterette & Motorcycle sales recorded appreciable growth rate during the month.



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

Vehicle Segment	October		
	2021-22	2022-23	Growth %age
Scooters/Scotrette	479,459	512,761	6.9
Motor Cycles/Step-Throughs	1,017,874	1,020,295	0.2
Mopeds	55,356	44,638	-19.4
2 Wheelers total estimate	1,552,689	1,577,694	1.6

Source: SIAM

THREE-WHEELER SALES:

Three-wheeler domestic sales in October 2022 with a volume of 0.54 lac recorded a growth of 70.3% on a-month-on-month basis over volume of 0.32 lac during October 2021.

HIGH SPEED DIESEL (HSD):

HSD (Diesel) consumption during the month of October 2022 with a volume of 6.98 MMT recorded a growth of 5.5% & 7.2% over a volume of 6.61MMT & 6.51 MMT in the month of October 2021 & 2019 respectively. However, it recovered 99.7% & 99.4% over a volume of 7 MMT & 7.02 MMT IN THE MONTH OF October 2020 & 2018 respectively.

Factors affecting diesel consumption during October 2022 are as follows:

- Economic activity went up for nearing festival season and ending monsson session.
- Sowing season of rabi crop ramed up diesel consumption in irrigation, pumps and tractor mobility.
- Harvest seasons of Kharif crops in some states of the country accounted for higher consumption of HSD

IHS Markit Manufacturing Purchasing Manager’s Index (PMI) increased to 55.3 in October 2022 from 55.1 in September22.

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

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

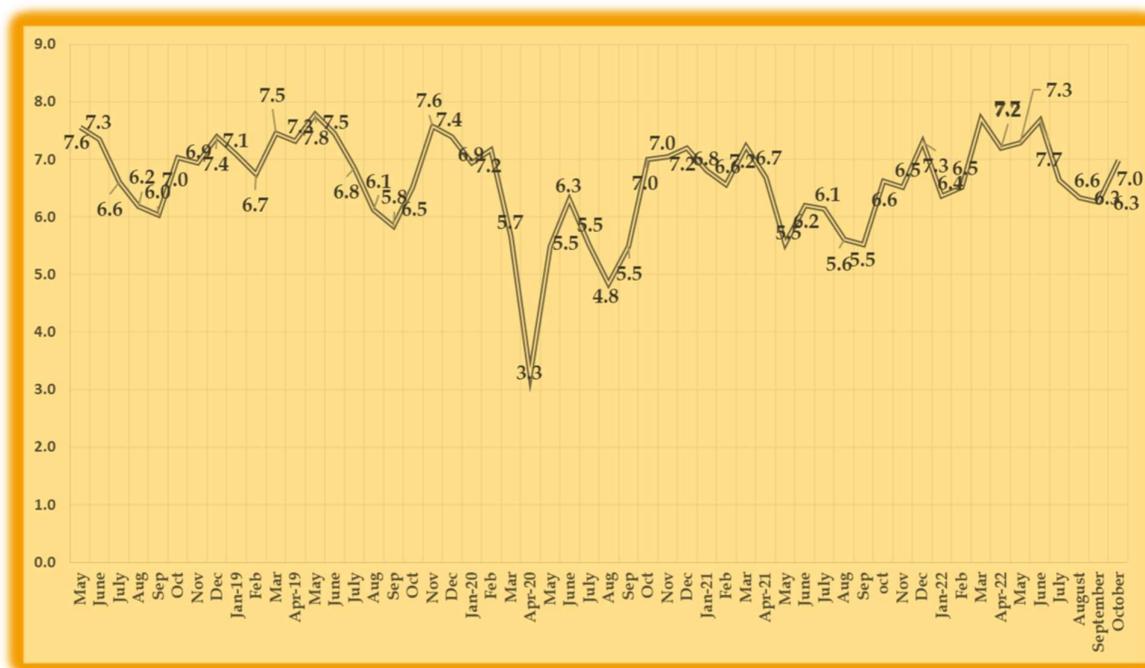
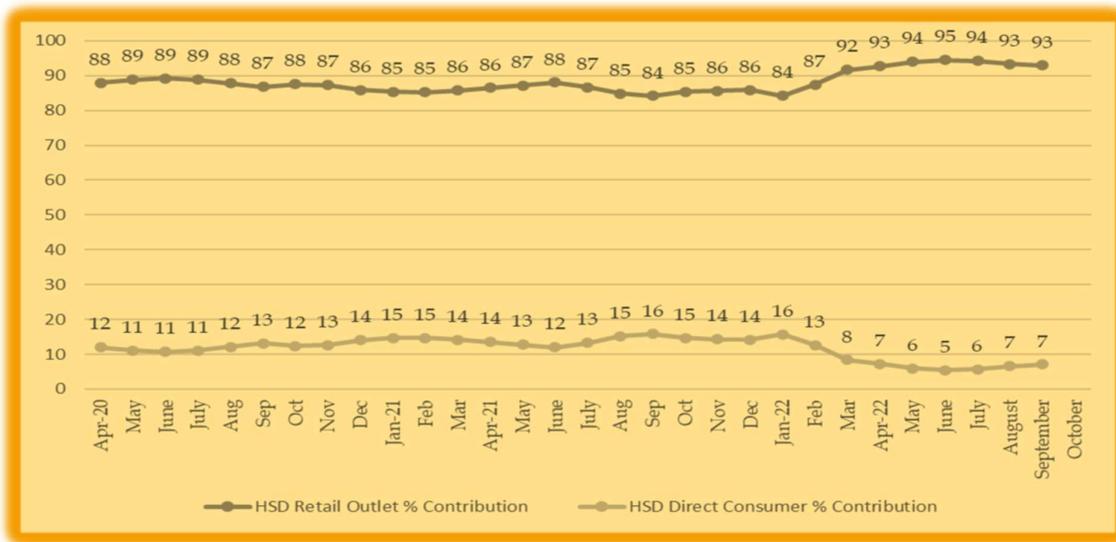


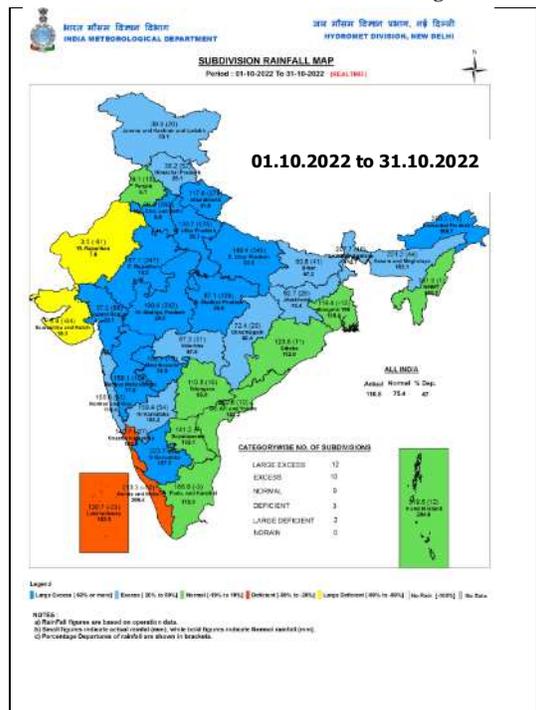
Figure-4: Share of Retail & Direct business (%) in Diesel consumption month-wise since October 2020



OTHER FACTORS IMPACTING CONSUMPTION OF HSD:

Seasonal rainfall scenario: The rainfall in the country during October 2022 was 47% above normal precipitation. A rainfall of 110.8 mm was recorded in the month of October 2022 as against a

normal reading of 75.4 mm. Out of total 36 subdivisions, 12 divisions received excess to large excess rainfall, 5 divisions received deficient rainfall whereas 9 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 69.7% in domestic sales of commercial vehicles

during the month of October 2022 as compared to October 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 October 2022 has registered a growth rate of 11.3% as compared to sales in October 2021. Sowing Rabi crop season and harvesting of Kharif crop may affect the growth in tractor sales during the month October-2022.

Port Traffic:

The traffic handled at major ports in India with a volume of 62 MMT in October 2022 recorded a growth of 3.6% on volume of 60 MMT in the month of October 2021.

Growth was observed in cargo handled during the month of October 2022 in all the major ports like Kolkata & Haldia 19.4%, New Mangalore 14.6%,

Kamarajar (Ennore) 10.4% with respect to October-2021.

During April-October 2022, sector wise growth was registered in coal (thermal, steam and coking) 25.98%, Other miscellaneous cargo 16.7%, Crude & Petroleum Oil & lubricants' (CPOL) 10.2%, with respect to October-2021.

During April-Oct-2022 cumulative per centage share was seen in of CPOL was maximum i.e. 30.31%, followed by coal 18%, container-tonnage 21.62%, other miscellaneous cargo 12%, other liquids 11.23%, iron ore & pellets 4.14%, and fertilizer 2.3%.



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



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

Ports	October 2021	October 2022	Growth (%)
Kolkata & Haldia	4,657	5,561	19.4
Paradip	9,118	9,831	7.8
Visakhapatnam	5,844	5,335	-8.7
Kamarajar (Ennore)	3,152	3,480	10.4
Chennai	4,465	4,027	-9.8
V.O. Chidambaranar	2,715	2,909	7.1
Cochin	2,995	2,103	-29.8
New Mangalore	3,132	3,589	14.6
Mormugao	1,261	1,036	-17.8
Mumbai	5,413	5,378	-0.6
JNPT	6,255	6,816	9.0
Deendayal	10,999	12,124	10.2
Total:	60,006	62,189	3.6

Source: ipa.nic.in

Power situation:

The position of power supply for the month of October 2022 is given in Table-5. As per the data reported, power deficit position had reduced to 0.1% in October-2022 as compared to 1.1% in the month of October 2021. The requirement of power in October 2022 was 1,13,264 MU has recorded a de-growth of 0.7% over requirement of power at 1,14,028 MU in the month of October 2021.

**Table-5: Power supplied and deficit for October 2022**

	October-2021			October-2022		
	Requirement	Supplied (MU)	Deficit %	Requirement	Supplied (MU)	Deficit %
North	34,245	33,446	2.3%	33,647	33,590	0.2%
West	35,690	35,471	0.6%	35,696	35,696	0.0%
South	28,375	28,337	0.1%	27,505	27,505	0.0%
East	14,128	13,956	1.2%	14,777	14,731	0.3%
North-East	1,591	1,587	0.2%	1,640	1640	0.0%
Total	114,028	112,797	-1.1%	113,264	113,162	0.1%

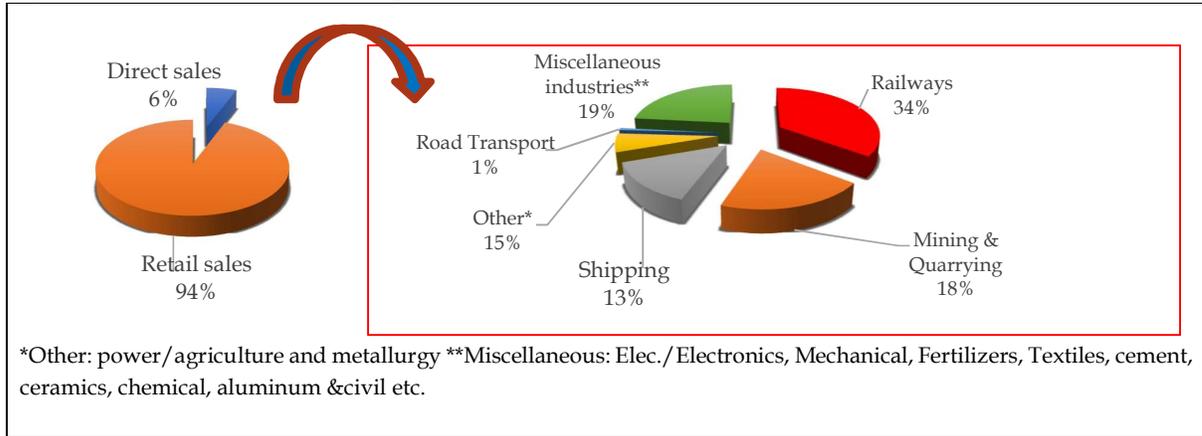
Source: Central Electricity Authority (CEA)

Sectoral consumption of HSD:

The cumulative diesel sale during April-October-2022 was 48.4 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 34% followed by Miscellaneous industries 19%, Mining & Quarrying 18%, Shipping 13%, other 15% and road transport 1%. Most of the retail sales are consumed in road transport.

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



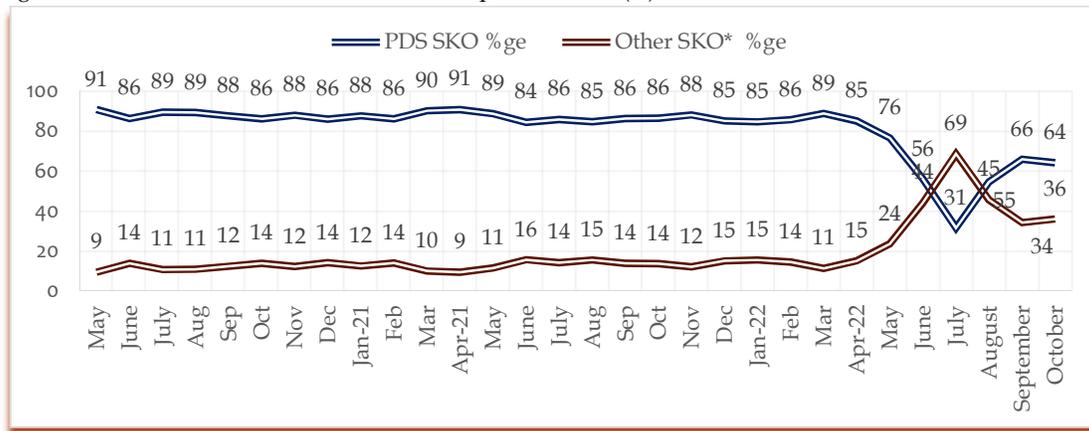
KEROSENE:

Kerosene consumption during October-2022 with a volume of 0.034MMT registered a de-growth of 73%, 75.9%, 80.3% & 88.4% as compared to October 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. 24KL of non-subsidized PDSSKO sales has been registered during the month for the state of Uttar Pradesh. In PDSSKO upliftment, West Bengal (9.7TMT) was the biggest consumer followed by Tamil Nadu (3.6 TMT) and Bihar

(3.1TMT). In non-PDS category Jammu & Kashmir (3.1TMT) was the biggest consumer followed by Tamil Nadu (2.9TMT) and Ladakh (1.6TMT). The market share of subsidized-PDS and other SKO was 64% & 36% respectively.



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

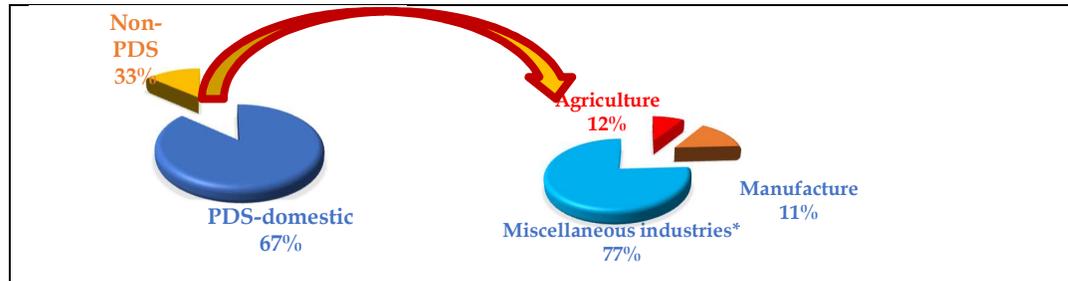


*Other SKO: non-subsidized PDS SKO +non-PDS kerosene

Sectoral consumption of SKO:

Out of total SKO sales during April-October-2022 with a volume of 0.32 MMT 'PDS domestic SKO' upliftment constituted to 67%. So far as SKO sales

in 'non-PDS commercial sector is concerned,' 77% accounted to miscellaneous industries followed by agriculture 12% manufacture 11% as shown in 6A/B chart.



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

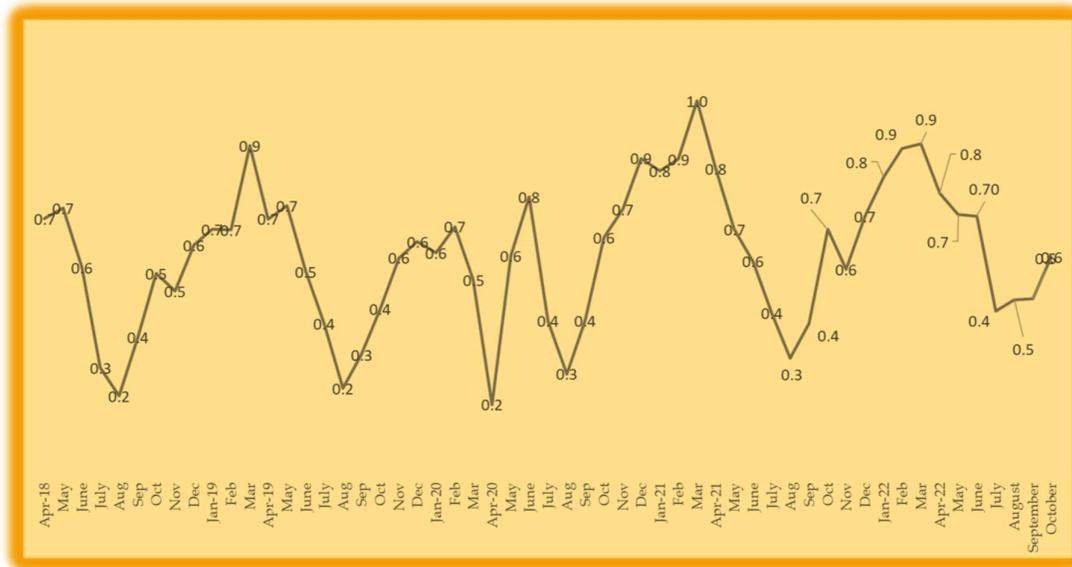
Figure-6A/B: PDS domestic, non-PDS commercial SKO sales & their breakup for April-October-202

BITUMEN:

Bitumen consumption during October 2022 with a volume of 0.59 MMT recovered 88.6% & 91.6% over a volume of 0.66 MMT & 0.64 MMT in the month of October 2021 & 2020 respectively. However, it marked a growth of 31.8%, & 8.2% over a volume of 0.45 & 0.54 MMT on year-on-year

basis in the month of October- 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 October 2018



Sectoral consumption of Bitumen:

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

LPG:

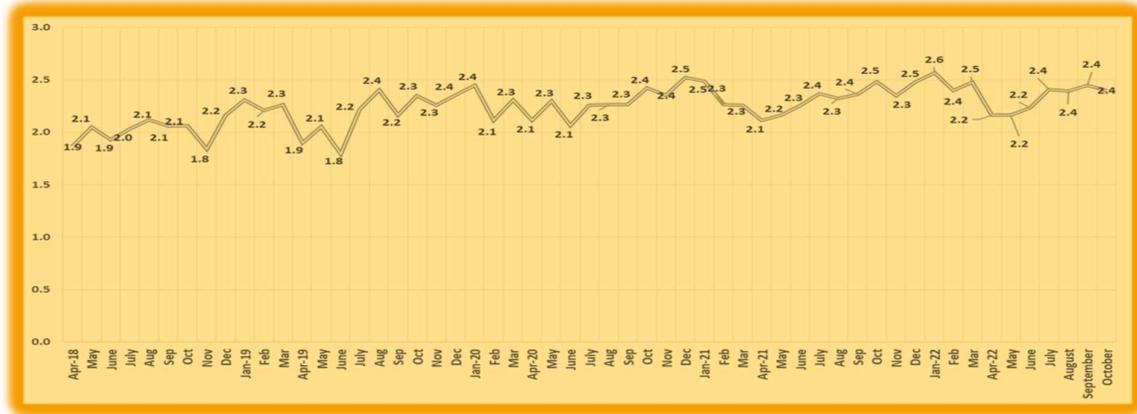
LPG consumption during the month of October 2022 with a volume of 2.4MMT recovered 96.7% & 99.2% over the volume of 2.48 MMT & 2.42 MMT in the month of October 2022 & 2021 respectively; however, it registered a growth rate of 2.2% , 16.3%

over the volume of 2.35 MMT & 2MMT in month of October 2020, 2019 respectively. LPG domestic customer base crossed 31 cr mark. PNG household customers reached 1 cr mark impacting LPG sales in such areas.

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

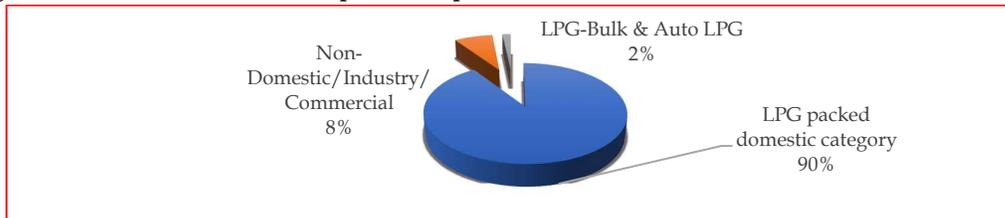
Figure-8: Month-wise LPG consumption (MMT) since October 2018



In April-October-2022 total LPG sale was 16.2 MMT driven by packed domestic category 90% followed by 'non-domestic/industry/commercial sector 8% as shown in 8A chart.

Sectoral consumption of LPG:

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



NAPHTHA:

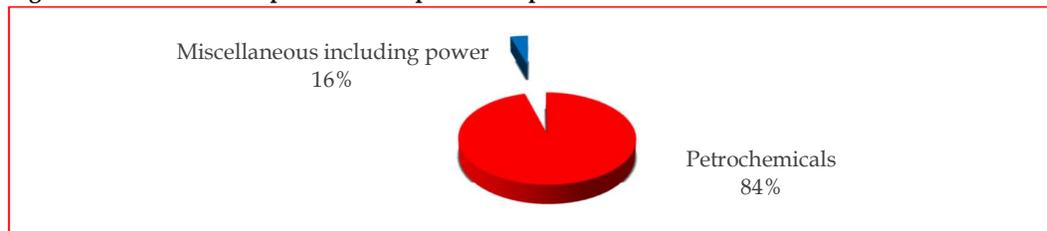
Naphtha consumption during the month of October 2022 with a volume of 0.96MMT recovered 76.1%,71.2%,85% and 71.5% over the volume of 1.26MMT, 1.35MMT, 1.12MMT & 1.34 MMT in October2021, 2020, 2019& 2018 respectively.

Petrochemical industries remain the main consumers of naphtha.

Sectoral consumption of Naphtha:

Consumption of naphtha during April-October-2022 with a volume of 7.4MMT was driven by petrochemicals sector 84%, whereas 16% naphtha consumption fell in 'miscellaneous industries including power' as shown in 8A chart.

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



ATF:

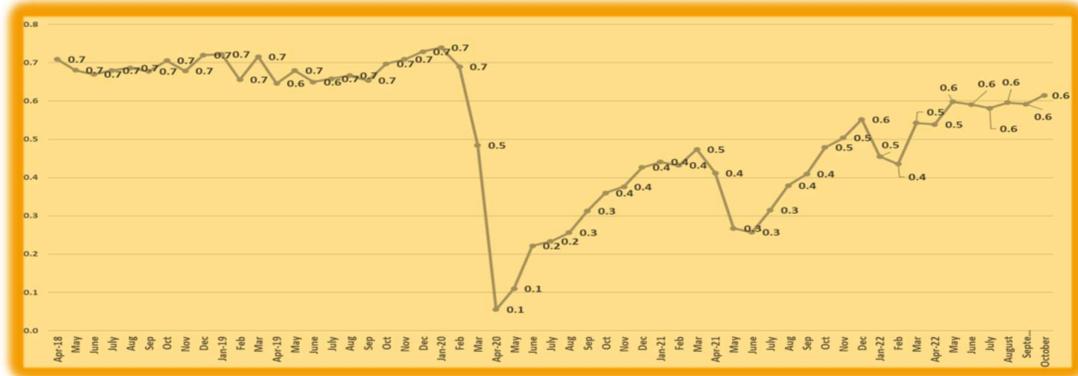
ATF consumption during October 2022 with a volume of 0.62 MMT registered a growth of 28.5% and 71% over the volume of 0.5 MMT and 0.4 MMT in October 2021 and 2020 respectively. However, it recovered 88.2% & 87.2% over the volume of 0.697

MMT & 0.706MMT in October 2019 & 2018 respectively.

The domestic footfall is back to be comparable with pre-Covid levels, however, international traffic footfall is lagging because of restricted entry in few countries.

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

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

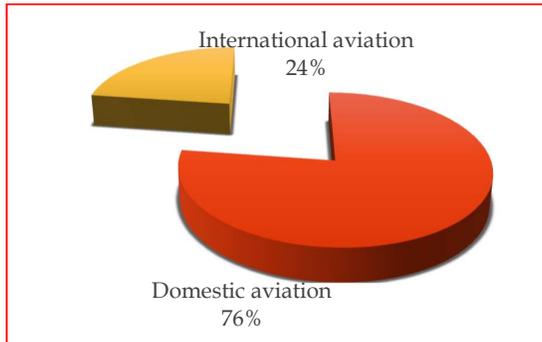


Sectoral consumption of ATF:

Almost entire ATF consumption during April-October-2022 with a volume of 4.1 MMT,

attributed to aviation sector; 76% domestic & 24% international aviation as shown in the chart.

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



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

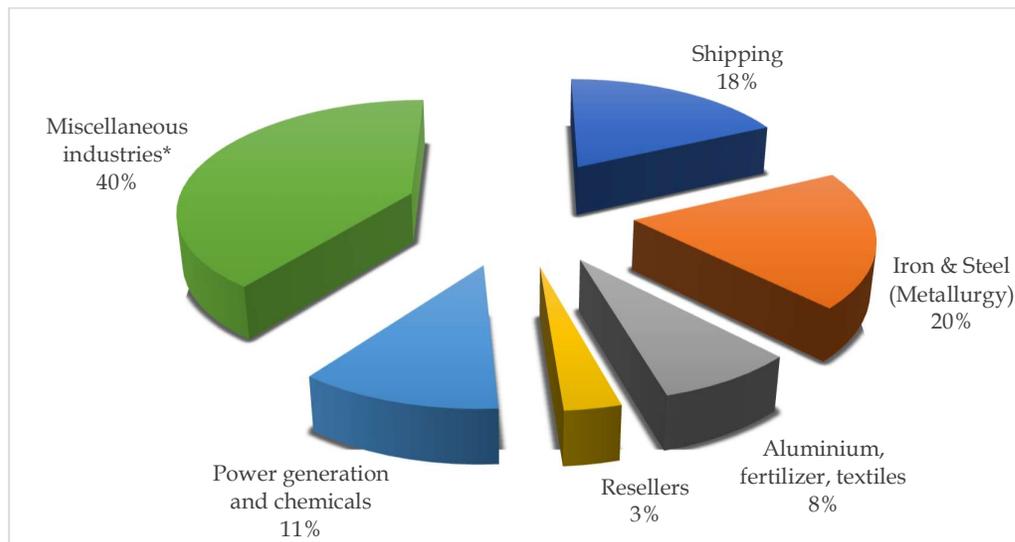
FO/LSHS consumption during October 2022 with a volume of 0.564 MMT recorded a growth rate of 1%, 17.6% 19.2% & 1.6% year-to-year basis over volume of 0.559 MMT, 0.480MMT, 0.473MMT, 0.555 MMT in the month of October 2021, 2020, 2019 & 2018 respectively. The higher growth rate is

attributed to consumption shift from gas to LSHS in refining and chemical sector.

Sectoral consumption of FO/LSHS:

Consumption of FO/LSHS during April-October-2022 with a volume of 3.9 MMT was driven by 'Miscellaneous industries' 40%, followed by 'Iron & steel (metallurgy)' 20% , 'shipping' 18% 'Power generation and chemicals' 11% and 'Aluminum, fertilizer& textiles' 8% as shown in the chart.

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



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

PETCOKE:

Petcoke consumption during the month of October 2022 with a volume of 1.34 MMT recorded a growth of 1.3% & 4.4% over volume of 1.32 & 1.29MMT in the month of October 2021,2020 respectively. However, it recovered to 80.7% and 98% on year-to-year basis over a volume of 1.7MMT & 1.4MMT in October-2019 & 2018 respectively.

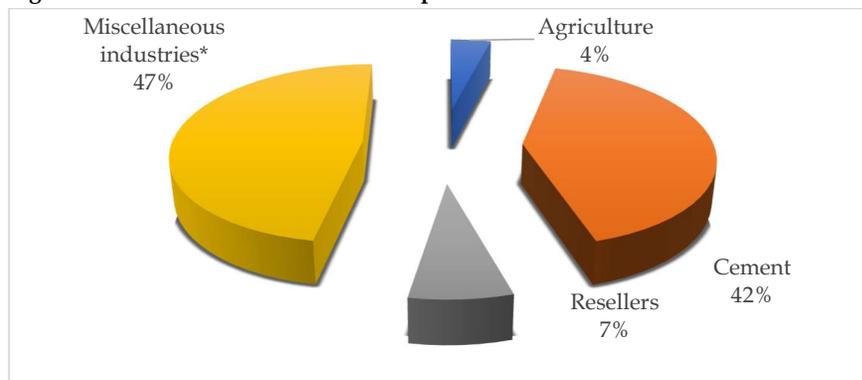
Directorate General of Foreign Trade (DGFT) under Ministry of Commerce and Industry has

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-October-2022 was of 9MMT. The domestic sales driven by 'cement industries' 42% followed by 'miscellaneous industries' 47%, as shown in the chart.

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



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

LIGHT DIESEL OIL:

LDO consumption during the month October-2022 with a volume of 0.067 MMT recovered 74% & 96.2% on year-to-year basis over a volume of 0.09 MMT & 0.07 MMT in the month of October 2021 & 2020 respectively. However, it registered growth rate of 38% & 36.3% over a volume of 0.048MMT, 0.049MMT in the month October-2019 & 2018 respectively.

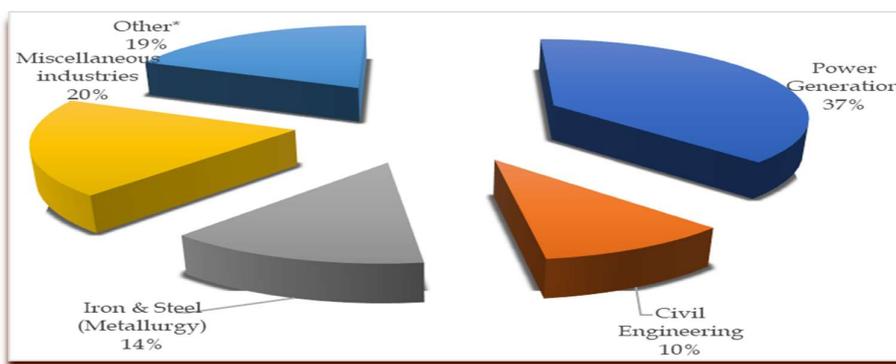
Sectoral consumption of Light Diesel Oil:

During April-October-2022, consumption of Light Diesel oil (LDO) with a volume of 0.4MMT was

driven by ‘Power Generation’ 37% followed by ‘Miscellaneous industries 20% and ‘other’ 19% as shown below sectoral consumption pie-chart.



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



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

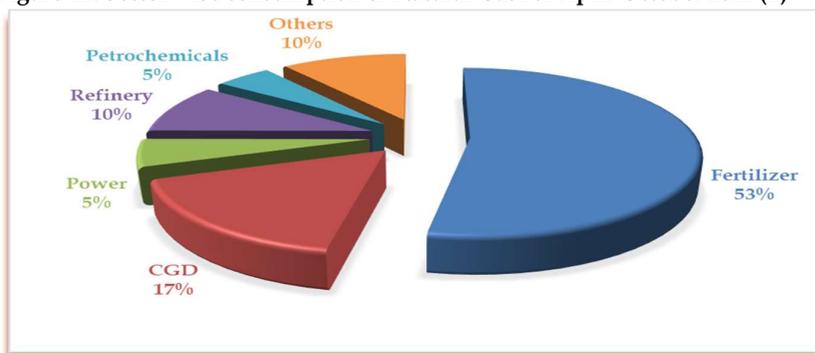
NATURAL GAS:

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 October 2022 recovered 97.3 % on volume of 5.4 BCM in the month of October 2021.

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

During April-September 2022, consumption of Natural gas (NG) with a volume of 36.5 BCM was driven by the fertilizer (53%) followed by CGD (17%), Refinery (10%), Power (5%), Petrochemicals (5%) and others (10%).

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



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

Source: 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)

Product	April- October					October					Growth(%)_2021 to 2022	
	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
(A) Sensitive Products												
LPG	16064	16213	0.9	2064	2348	2421	2481	2400	16.3	2.2	-0.8	-3.3
SKO	893	315	-64.8	289	170	139	125	34	-88.4	-80.3	-75.9	-73.0
Sub Total	16957	16528	-2.5	2353	2518	2560	2606	2434	3.4	-3.4	-4.9	-6.6
(B) Major Decontrolled Product												
HSD	42282	48381	14.4	7024	6510	7001	6618	6980	-0.6	7.2	-0.3	5.5
MS	17457	20416	17.0	2332	2539	2655	2750	2993	28.3	17.9	12.7	8.8
Naphtha	7034	7378	4.9	1340	1128	1346	1260	958	-28.5	-15.0	-28.8	-23.9
ATF	2519	4109	63.1	706	697	360	479	615	-12.8	-11.8	71.0	28.5
Bitumen	3881	4136	6.6	543	446	640	663	587	8.2	31.8	-8.2	-11.4
FO/LSHS	3515	3916	11.4	555	473	480	559	564	1.6	19.2	17.6	1.0
Lubes+Greases	2531	2557	1.0	351	326	391	461	410	16.8	25.5	4.8	-11.2
LDO	604	420	-30.5	49	48	69	90	67	36.3	38.0	-3.8	-26.0
Sub Total	79823	91313	14.4	12899	12168	12941	12879	13174	2.1	8.3	1.8	2.3
Sub - Total (A) + (B)	96780.1	107840.8	11.4	15251.4	14686.7	15500.5	15484.7	15607.5	2.3	6.3	0.7	0.8
(C) Other Minor Decontrolled Products												
Pet.Coke	7810	9014	15.4	1371	1665	1287	1326	1344	-2.0	-19.3	4.4	1.3
Others*	6956	9263	33.2	1040	992	937	952	1418	36.4	42.9	51.4	48.9
Sub Total	14766	18277	23.8	2411	2657	2223	2278	2762	14.6	3.9	24.2	21.2
Total	111546	126118	13.1	17662	17344	17724	17763	18369	4.0	5.9	3.6	3.4

*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



आज़ादी का
अमृत महोत्सव



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