



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



INDUSTRY CONSUMPTION REPORT-POL & NG, FEBRUARY 2023

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वितरण CIRCULATION:

पेट्रोलियम और प्राकृतिक गैस मंत्रालय:	MoP&NG:
<p>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 व मार्केटिंग) संयुक्त सचिव (एक्सप्लोरेशन व बायो रिफाइनरी) संयुक्त सचिव (जीपी) संयुक्त सचिव (जी) उप महानिदेशक, (इ एवं एस) संयुक्त सचिव (आईएफडी) संयुक्त सचिव (आईसी)</p> <p>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</p>	<p>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 & Marketing) Jt. Secretary (Exploration & Biorefinery) 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</p>

From the desk of DG-PPAC

Greetings from Petroleum Planning & Analysis Cell!

Dear readers,

Petroleum Planning & Analysis Cell (PPAC), an attached office of the Ministry of Petroleum & Natural Gas (MoPNG), Government of India, collects and analyses data on the Oil and Gas sector.

PPAC publishes the Industry POL and NG consumption report on its website www.ppac.gov.in which has been readily redesigned to have modern look and feel.

It is a critical data analysis of pan India demand and distribution profile of POL & NG products. The historical trend of domestic consumption of various products and their YoY and cumulative growth rate defines a clear time series profile of the demand regime. The sectoral breakup of consumption of most of the POL and NG products put a light on the actual percentage share of a finished product to its end users.

In this edition we envisaged YoY comparison of sectoral consumption breakup and its quantitative perspective. It would definitely help to figure out the transitions in granular level.

I hope the report would serve the purpose of meta data analysis for stakeholders in the oil and gas sectors, alternate energy division & the planners, policymakers, academicians, analysts, market researchers & the industries. I suggest all the stakeholders to have a look on PPAC website for various data and reports.



पेट्रोलियम योजना एवं विश्लेषण प्रकोष्ठ की ओर से अभिवादन!

प्रिय पाठकों,

पेट्रोलियम योजना और विश्लेषण सेल (PPAC), भारत सरकार के पेट्रोलियम और प्राकृतिक गैस मंत्रालय (MoPNG) का एक संबद्ध कार्यालय, तेल और गैस क्षेत्र पर डेटा एकत्र और विश्लेषण करता है।

पीपीएसी अपनी वेबसाइट www.ppac.gov.in पर उद्योग पीओएल और एनजी खपत रिपोर्ट प्रकाशित करता है जिसे आधुनिक रूप और अनुभव के लिए आसानी से फिर से डिजाइन किया गया है। यह पीओएल और एनजी उत्पादों की अखिल भारतीय मांग और वितरण प्रोफाइल का एक महत्वपूर्ण डेटा विश्लेषण है। विभिन्न उत्पादों की घरेलू खपत की ऐतिहासिक प्रवृत्ति और उनकी साल दर साल और संचयी विकास दर मांग व्यवस्था की एक स्पष्ट समय श्रृंखला प्रोफाइल को परिभाषित करती है। अधिकांश पीओएल और एनजी उत्पादों की खपत का क्षेत्रीय विभाजन अंतिम उपयोगकर्ताओं के लिए तैयार उत्पाद के वास्तविक प्रतिशत हिस्से पर प्रकाश डालता है।

इस संस्करण में हमने क्षेत्रवार खपत और उसके मात्रात्मक परिप्रेक्ष्य की साल-दर-साल तुलना की परिकल्पना की है। यह निश्चित रूप से दानेदार स्तर में बदलाव का पता लगाने में मदद करेगा।

मुझे उम्मीद है कि यह रिपोर्ट तेल और गैस क्षेत्रों में हितधारकों, वैकल्पिक ऊर्जा प्रभाग और योजनाकारों, नीति निर्माताओं, शिक्षाविदों, विश्लेषकों, बाजार शोधकर्ताओं और उद्योगों के लिए मेटा डेटा विश्लेषण के उद्देश्य को पूरा करेगी। मैं सभी हितधारकों को सुझाव देता हूँ कि वे विभिन्न डेटा और रिपोर्ट के लिए पीपीसी वेबसाइट देखें।

P. Manoj Kumar
Director General-PPAC

प. मनोज कुमार
महानिदेशक-पीपीएसी

From the desk of D&ES- I/C

Subject: Industry Consumption Review

Report of PPAC: February 2023

February-23 domestic POL consumption might be four months low but with days correction it is probably the highest.

Moreover, domestic HSD (7.5%), MS (8.9%), ATF (43.2%), FO/LSHS (7.2%) consumption has shown remarkable YoY growth during the month. Indian Oil and Gas industries are maintaining strong sequential growth in their crude refining and production potential as well.

Recovery pattern was observed in Bitumen, LDO, SKO, 'Lubes & greases' and petcoke consumption figure and marginally in LPG.

So far as India's alternate energy domain is concerned, India's EBP in February-23 was remarkable achieving 12% blending percentage. As per recent news OMCs are targeting to install alternate fuel stations (EV charging/CNG/PNG/LNG/CBG etc.) in 22,000 Retail outlets by May-2024.

We must appreciate India's rapid growth not only in POL sector but also in alternate energy domain.

IHS Markit Manufacturing Purchasing Manager's Index (PMI), e-way bill collection, GST collection etc. during the month indicated rapid momentum in Indian economy.

The crude supply to India remained flexible & the average crude price for Indian Basket in February-23 hinged around USD82.28/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 - February 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 – फरवरी 2023

फरवरी-23 घरेलू पीओएल खपत चार महीने कम हो सकती है लेकिन दिनों के सुधार के साथ यह शायद सबसे अधिक है।

इसके अलावा, घरेलू एचएसडी (7.5 फीसदी), एमएस (8.9 फीसदी), एटीएफ (43.2 फीसदी), एफओ/एलएसएचएस (7.2 फीसदी) की खपत ने महीने के दौरान उल्लेखनीय वृद्धि दिखाई है। भारतीय तेल और गैस उद्योग अपने कच्चे तेल शोधन और उत्पादन क्षमता में भी मजबूत क्रमिक वृद्धि बनाए हुए हैं।

बिटुमेन, एलडीओ, एसकेओ, 'ल्यूब्स एंड ग्रीस' और पेटकोक की खपत के आंकड़े और एलपीजी में मेरेजिनली में रेकीवरी पैटर्न देखा गया।

जहां तक भारत के वैकल्पिक ऊर्जा क्षेत्र का संबंध है, फरवरी-23 में भारत का ईबीपी 12% प्रतिशत हासिल करने में उल्लेखनीय था। हाल की खबरों के अनुसार ओएमसीज ने मई-2024 तक 22,000 आर.ओ. में वैकल्पिक ईंधन स्टेशन (ईवी चार्जिंग/सीएनजी/पीएनजी/एलएनजी/सीबीजी आदि) स्थापित करने का लक्ष्य रखा है।

हमें न केवल पीओएल क्षेत्र में बल्कि वैकल्पिक ऊर्जा क्षेत्र में भी भारत के तीव्र विकास की सराहना करनी चाहिए।

महीने के दौरान आईएचएस मार्किट मैनुफैक्चरिंग परचेजिंग मैनेजर इंडेक्स (पीएमआई), ईवे बिल कलेक्शन, जीएसटी कलेक्शन आदि ने भारतीय अर्थव्यवस्था में तेजी का संकेत दिया। भारत में कच्चे तेल की आपूर्ति लचीली रही और सितंबर-22 में भारतीय बास्केट के लिए कच्चे तेल की औसत कीमत लगभग **USD 80.92/bbl** थी।

पेट्रोलियम योजना और विश्लेषण प्रकोष्ठ (PPAC) द्वारा मासिक पेट्रोलियम उद्योग खपत समीक्षा रिपोर्ट तैयार की गई है। रिपोर्ट में अप्रैल-नवम्बर 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:



Recently concluded 'India's Energy week (IEW) summit witnessed the formation of 'Global Biofuel alliance' among India, United States and Brazil. It is one of the priorities under India's G20 presidency.

The Goods and Services Tax collection marked Rs.1.5 lakh crore in February 2023, 12% higher than in February 2022. Monthly GST collection exceeds 1.4 lakh crore band for 12 straight months in a row.

The average FOB (Free on Board) price of Indian basket crude oil during the month February-2023 was USD 82.28/bbl.

The power demand in February 2023 increased by 8.2% as compared to February 2022 and power deficit was 0.4% in the month of February 2023. The average rainfall during the month was registered at 7.2 mm with percentage of departures 68percent with respect to 'this year February normal rainfall value' of 22.7 mm. Traffic at major ports during the month of February 2023 recorded a YoY growth 12% of the volumes in the month of February 2022.

The growth percentage in consumption of petroleum products, category-wise, for the month of February 2023 is given in Table-1.

SUMMARY OF PRODUCT WISE POL CONSUMPTION PROFILE FOR FEBRUARY-22

1. The consumption of petroleum products in February 2023 with a volume of 18.5MMT recorded a growth of 5.7% on volume of 17.5 MMT in February 2022, 10.9 % growth on volume of 16.7 MMT in February 2021, 2.1% growth on volume 18.1MMT in February 2020 and 6.0% growth on volume of 17.4 MMT in February 2019. The economic momentum is under acceleration with appreciable growth rate.
2. MS (Petrol) consumption during the month of February 2023 with a volume of 2.8 MMT (0.88 mbpd) recorded a growth of 8.9% on the volume of 2.6MMT (0.81 mbpd) in February 2022.
3. HSD (Diesel) consumption during the month of February 2023 with a volume of 6.997 MMT (1.9 mbpd) recorded a growth of 7.5% on the volume of 6.5 MMT(1.77 mbpd) MMT in the month of February-22
4. LPG consumption during the month of February 2023 with a volume of 2.391 MMT recovered 99.9% over the volume of 2.393 MMT in the month of February 2022. As usual, LPG consumption during the month had been largely driven by consumption in domestic category.
5. ATF consumption during February 2023 with a volume of 0.62 MMT registered a growth of 43.2%, over a volume of 0.44 MMT during the month of February 2022.
6. Bitumen consumption during February 2023 with a volume of 0.8 MMT recovered 90.6% over a volume of 0.88 MMT in the month of February 2022.
7. Kerosene (SKO) consumption with a volume of 0.03 MMT registered a de-growth of 71.6% in February 2023 as compared to February 2022. SKO consumption during the month is largely constituted by PDS category 0.018MMT. Only the state of Karnataka and Kerala registered 2180KL(1.7TMT) and 36 KL(0.03 TMT) sales respectively in nonsubsidised PDS SKO category during the month of February.
8. Average percentage of ethanol blending in petrol (EBP) marked 12% in February-2023. Around 43 cr litre ethanol has been blended in petrol under EBP program
9. Total Natural Gas Consumption (including internal consumption) for the month of February 2023, with a volume of 4.8 BCM, registered 6.7% growth rate over the volume of 4.5 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 February 2023. Data on product-wise monthly consumption of petroleum products for February 2023 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)

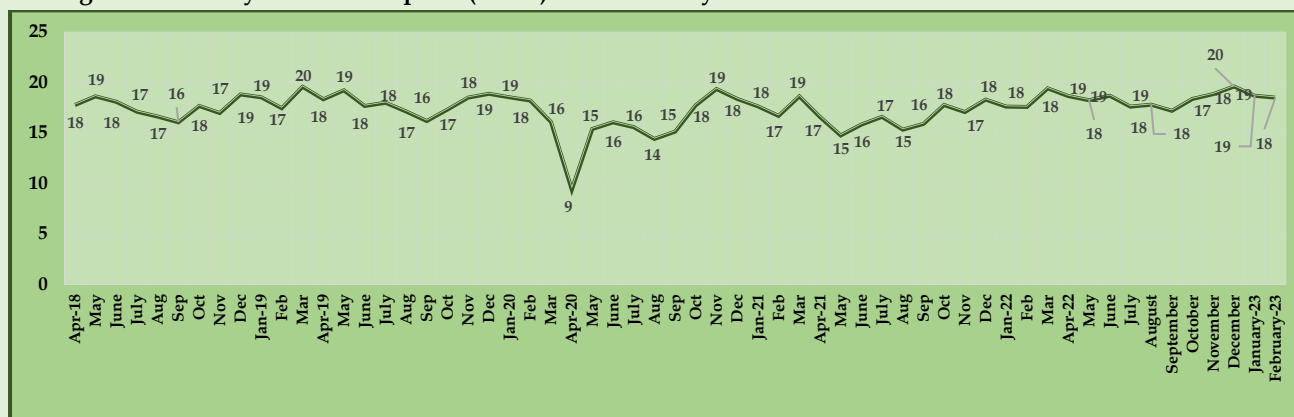
Product	February				April-February		
	2021-22	2022-23	% share of 2022-23	Growth (%)	2021-22	2022-23	Growth (%)
(A) Sensitive Products							Unit-TMT
LPG	2393	2391	13	-0.1	25781	26097	1.2
SKO	117	33	0.2	-71.6	1379	459	-66.7
Sub Total	2511	2425	13	-3.4	27160	26556	-2.2
(B) Major Decontrolled Product							
HSD	6511	6997	38	7.5	68954	78100	13.3
MS	2550	2776	15	8.9	27941	31868	14.1
Naphtha	1100	1055	6	-4.1	12114	11043	-8.8
ATF	435	623	3	43.2	4465	6678	49.5
Bitumen	884	801	4	-9.4	6873	6856	-0.2
FO/LSHS	530	569	3	7.2	5672	6363	12.2
Lubes+Greases	380	348	2	-8.4	4002	3386	-15.4
LDO	85	56	0.3	-33.9	935	647	-30.8
Sub Total	12475	13223	72	6.0	130957	144940	10.7
(C) Other Minor Decontrolled Products							
Pet.Coke	1520	1493	8	-1.8	12882	16440	27.6
Others*	992	1347	7	35.8	11181	13859	24.0
Sub Total	2512	2840	15	13.1	24063	30299	25.9
Total	17497	18488	100	5.7	182181	201796	10.8
*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 January-February'23, 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 February 2023 with a volume of 18.5 MMT registered a growth of 5.7% on volume of 17.5 MMT in February 2022. The products which registered a growth in the month of February 2023 were High Speed Diesel (HSD) 7.5%, Petrol (MS)

8.9%, Aviation Turbine Fuel (ATF) 43.2%, Furnace Oil & Low Sulphur Heavy Stock (FO/LSHS) 7.2%, and products categorised under “Others” category 35.8% while the products which registered de-growth during the month were liquefied petroleum gas (LPG) 0.1%, Kerosene (SKO) 71.6%, Naphtha (4.1%), Bitumen (9.4%), Light Diesel Oil (LDO) 33.9%, Lubes & greases (8.4%) and petcoke 1.8% as compared to February 2022.

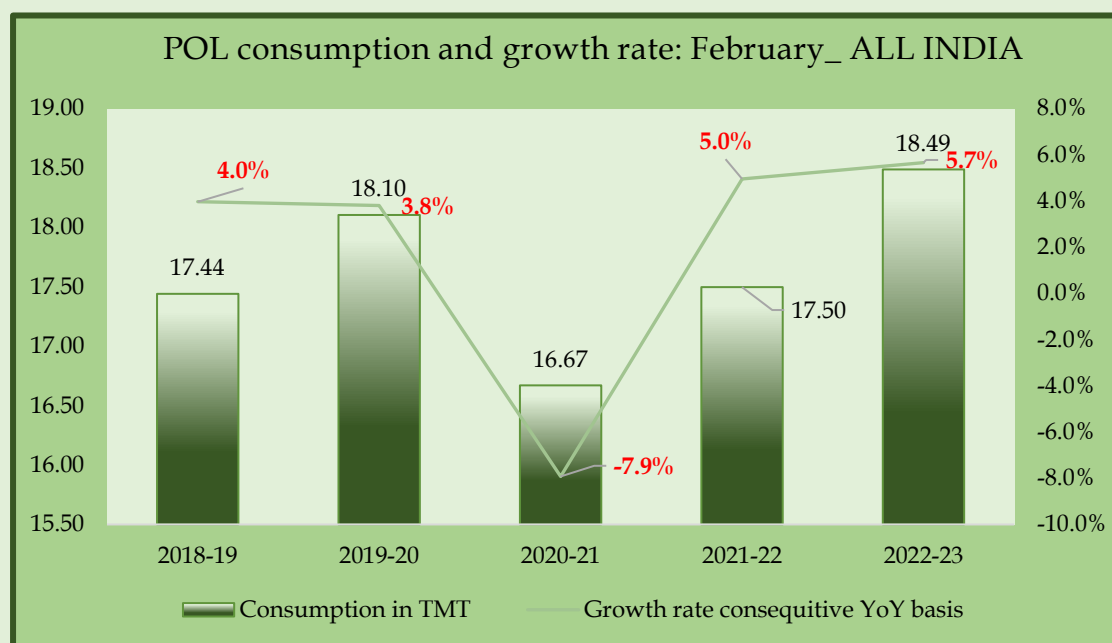
Figure-1: Monthly POL consumption (MMT) since February 2018



The overall POL domestic consumption profile during February-2023 & 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 February 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):

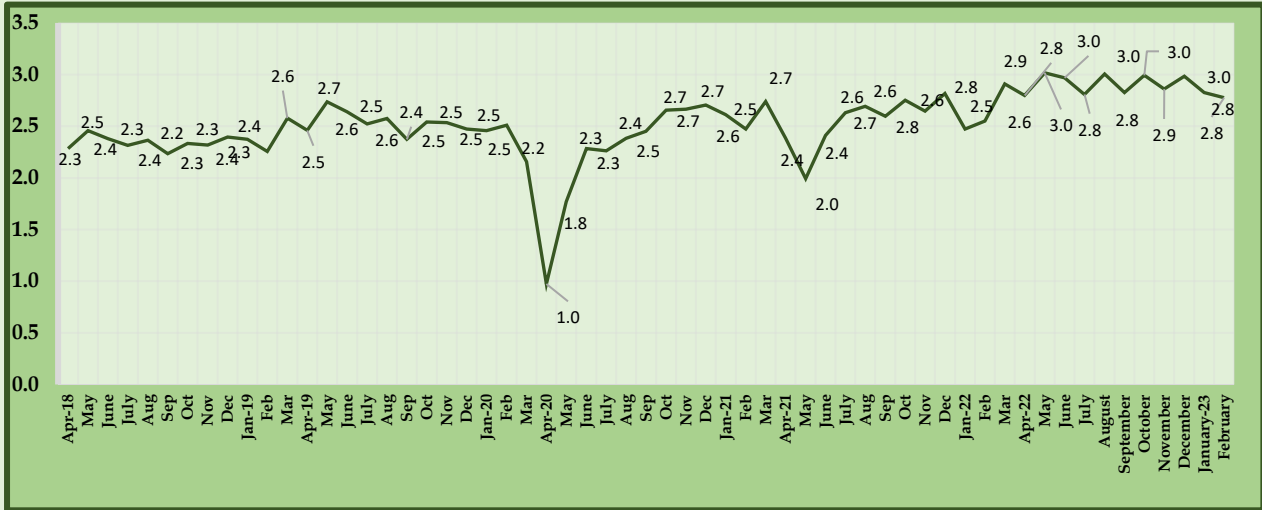
MS (Petrol) consumption during the month of February 2023 with a volume of 2.8 MMT registered a growth of 8.9%, 12.3%, 10.5% and 23% over the volume of 2.55MMT, 2.47MMT, 2.51MMT & 2.25MMT in February 2022, 2021, 2020 & 2019 respectively.

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

- Economic momentum well maintained during the month
- In few cases, Mobility shifted towards MS due to volatile CNG price
- Tourism dependent states saw heavy influx of travelers giving a boost to economic activities
- Less rain also accounted for higher influx of vehicles

- Marriage season, holiday travel attributed to higher car sales attributing increased MS consumption
- Low base factor accounted for historic high growth percentage rates as usual.

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



OTHER FACTORS IMPACTING CONSUMPTION OF MS:

PASSENGER VEHICLE SALES:

The Sale of Passenger Vehicles in February 2023 at 2.9 lacs recorded growth of 11% YoY over sale of 2.6 lacs in the month of February 2022. ‘Passenger vehicle’ sales have been driven by ‘utility vehicles.’

Passenger cars, utility vehicles and vans recorded a growth of 6.5%, 15.1% & 23.7% respectively during the current month as compared to the same period previous year. However, the data

Table-2: Passenger vehicle sales in the month of February 2023

Vehicle Segment	February		Growth %age
	2021-22	2022-23	
Passenger Cars	133,572	142,201	6.5
Utility Vehicles	120,122	138,238	15.1
Vans	9,290	11,489	23.7
Total PV	262,984	291,928	11.0

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

TWO-WHEELER SALES:

comparison is without BMW, Mercedes, Tata Motors and Volvo Auto sales data.



Two-wheeler sales in February 2023 with a volume of 11.3 lacs recorded a growth of 7.6% on a month-

on-month basis over volume of 10.5 lacs during February 2022.

Scooters/ Scooterette & Motorcycle sales was impacted by the shortage in semiconductors and other special elements in the market.

THREE-WHEELER SALES:

Three-wheeler domestic sales in February 2023 with a volume of 0.5 lac recorded a growth of

86.1% on a-month-on-month basis over volume of 0.27 lac during February 2022.

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

Vehicle Segment	February		
	2021-22	2022-23	Growth %age
Scooters/Scotrette	356,222	391,054	9.8
Motor Cycles/Step-Throughs	658,009	703,261	6.9
Mopeds	35,848	35,346	-1.4
2 Wheelers total estimate	1,050,079	1,129,661	7.6
Passenger Carrier-3 wheeler	18,144	38,777	113.7
Goods Carrier-3 wheeler	7,535	8,711	15.6
E-Rickshaw	1,249	2,615	109.4
E-cart	146	279	91.1
3 Wheelers total estimate	27,074	50,382	86.1

Source: SIAM

HIGH SPEED DIESEL (HSD):

HSD (Diesel) consumption during the month of February 2023 with a volume of 6.997 MMT recorded a growth of 7.5%, 6.5% & 3.9% over a volume of 6.511MMT, 6.569 MMT & 6.737 MMT in the month of February 2022,2021& 2019 respectively. However, it recovered 97.7% over the volume of 7.162 MMT in February-2020. The HSD consumption for the month has crossed 6.9MMT band for the eighth time in FY-2022-23 so far.

Factors affecting diesel consumption during February 2023 are as follows:

- Less rain fall & nearing harvesting season of rabi crop ramped up diesel consumption in irrigation, pumps etc.

- Marriage season influenced personal mobility and gave push to diesel consumption.
- Full-fledged industrial and mining activities in various parts of India increased diesel consumption. Less rainfall during the month ramped up mining activities.
- Election in some states of the country ramped up vehicular movement and usage of Diesel Generator etc. attributing increased HSD consumption

IHS Markit Manufacturing Purchasing Manager's Index (PMI) marked twelve years high 59.4 in February 2023 from 57.2 in January-22.

Pan India based domestic HSD consumption since April-18 till date is shown in the Fig-3. HDS market share in direct and retail sales is shown in the Figure-4.

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

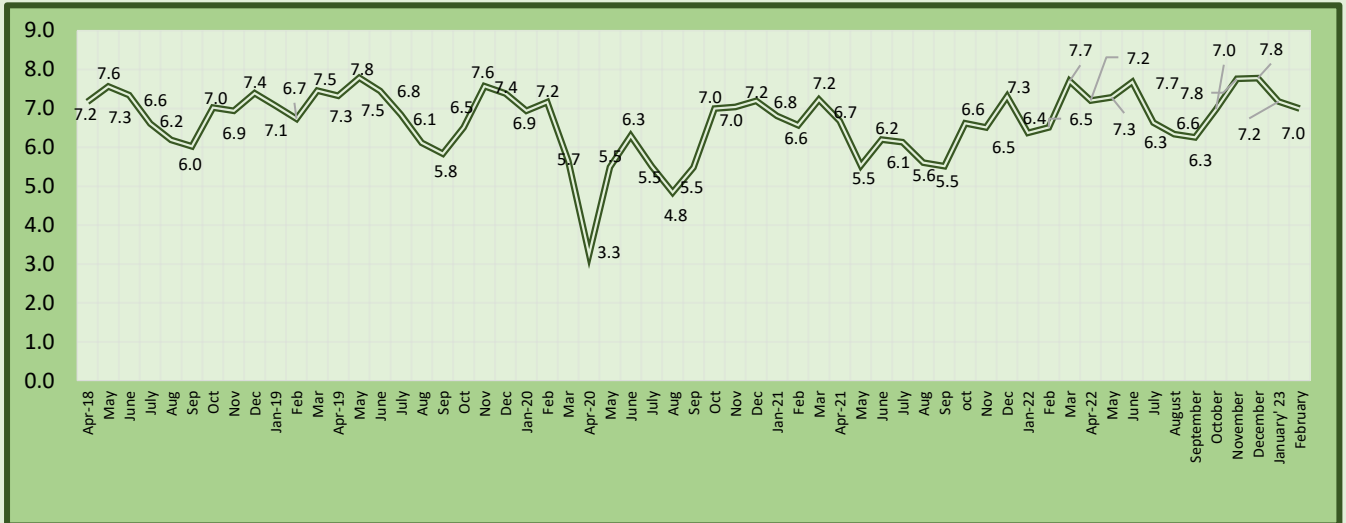
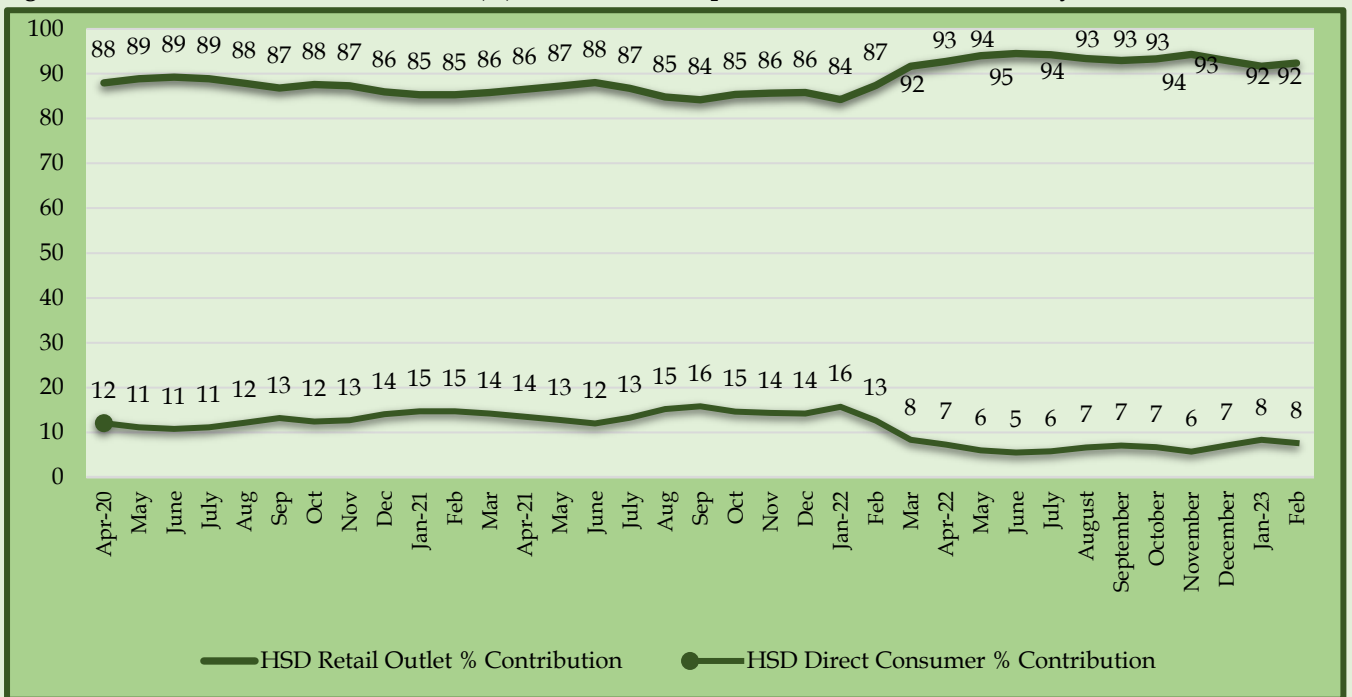


Figure-4: Share of Retail & Direct business (%) in Diesel consumption month-wise since February 2020

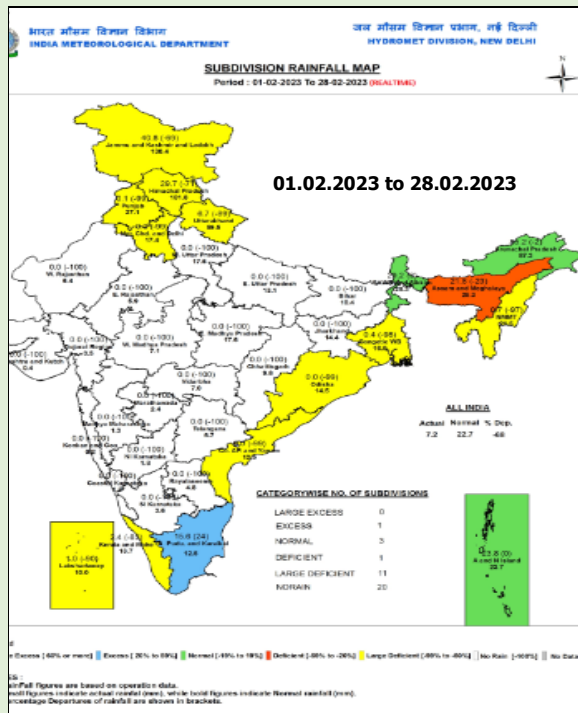


recorded in the month of February 2023 as against a normal reading of 22.7 mm.

OTHER FACTORS IMPACTING CONSUMPTION OF HSD:

Seasonal rainfall scenario: The rainfall in the country during February 2023 was 68% below normal precipitation. A rainfall of 7.2 mm was

Source: India Meteorological Department (IMD)



Out of total 36 subdivisions, 1 division received excess to large excess rainfall, 32 divisions received deficient rainfall whereas 3 division received

E-Way Bill

The electronic bill is mandatory document for transportation of goods of value higher than Rs 50,000. This Electronic document is used to track goods being moved around between cities and states. Economic activity driven by domestic trade is reflected from e-way bill generation. Number of E-way bills reflect quantum of transport activities directly influencing Diesel sales.

For the month of February, the volume of e-way bills generated was notch 8.18 Cr. INR (28 days); though it is three months low, with days corrected it would be probably the highest in this FY2022-23.

COMMERCIAL VEHICLE

Based on data reported by individual companies, 68% in domestic sales of commercial vehicles including three-wheelers during the month of February 2023 as compared to February 2022. 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 February 2023 has

registered a growth rate of 30% as compared to sales in February 2022. Growing Rabi crop season and less rainfall affected the growth in tractor sales during the month February-2023.

PORT TRAFFIC:

The traffic handled at major ports in India with a volume of 65.5 MMT in February 2023 recorded a growth of 12% on volume of 58.6 MMT in the month of February 2022.

Growth was observed in cargo handled during the month of February 2023 in all the major ports like Kolkata & Haldia 6.1%, Paradip 23.6%, V.O.Chidambaranar 26%, Cochin 10%, New Mangalore 1.9%, Mormugao 11.3%, Mumbai 11.8%, JNPA (revised from JNPT in Nov-22) 18% and Deendayal 27% with respect to February-2022.

During 'April-22 to February-23', sector wise growth was registered in coal (thermal, steam and coking) 54.8%, Other miscellaneous cargo 12.3%, Crude & Petroleum Oil & lubricants LPG/LNG' (CPOL) 13.5%, with respect to 'April-21 to February-22'. The Percentage tonnage share in Feb-23 was maximum in CPOL 34.8% followed by container-tonnage & TEUs 22.3% and Coal (thermal & steam and coking & others) 22.1%, &

other miscellaneous cargo 12.5%, Iron ore & pellets 7.6%, other liquids 4% and fertilizer 2.3%.

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

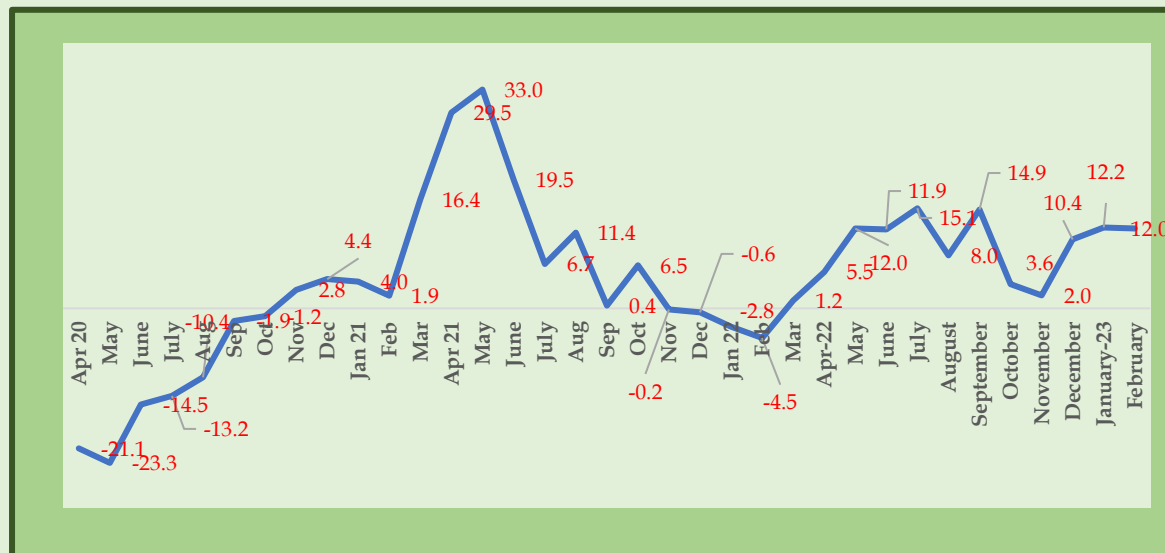


Table-4: Traffic handled at major ports in February 2023(Qty in TMT)

Ports	February 2022	February 2023	Growth (%)
Kolkata & Haldia	5,261	5,583	6.1
Paradip	10,175	12,581	23.6
Visakhapatnam	5,397	5,093	-5.6
Kamarajar (Ennore)	3,424	3,303	-3.5
Chennai	4,072	3,557	-12.6
V.O. Chidambaranar	2,389	3,011	26.0
Cochin	3,050	3,355	10.0
New Mangalore	3,488	3,555	1.9
Mormugao	1,559	1,735	11.3
Mumbai	4,600	5,144	11.8
JNPT	6,072	7,167	18.0
Deendayal	9,070	11,517	27.0

Total:	58,557	65,601	12.0
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Source: ipa.nic.in

Power situation:

The position of power supply for the month of February 2023 is given in Table-5. As per the data reported, power deficit position was 0.4% in February-2023 whereas it was 0.3% in February

2022. The requirement of power in February 2023 was 1,17,209 MU has recorded a growth of 8.2% over requirement of power at 1,08,363 MU in the month of February 2022.

Table-5: Power supplied and deficit for February 2023

	February-2022			February-2023		
	Requirement	Supplied (MU)	Deficit %	Requirement	Supplied (MU)	Deficit %
North	29,261	29,091	-0.6%	31,583	31,207	-1.2%
West	36,206	36,197	0.0%	39,951	39,917	-0.1%
South	30,128	30,056	-0.2%	32,414	32,407	0.0%
East	11,490	11,410	-0.7%	11,959	11,870	-0.7%
North-East	1,278	1,278	0.0%	1,303	1,295	-0.6%
Total	108,363	108,032	-0.3%	117,209	116,697	-0.4%

Source: Central Electricity Authority (CEA)

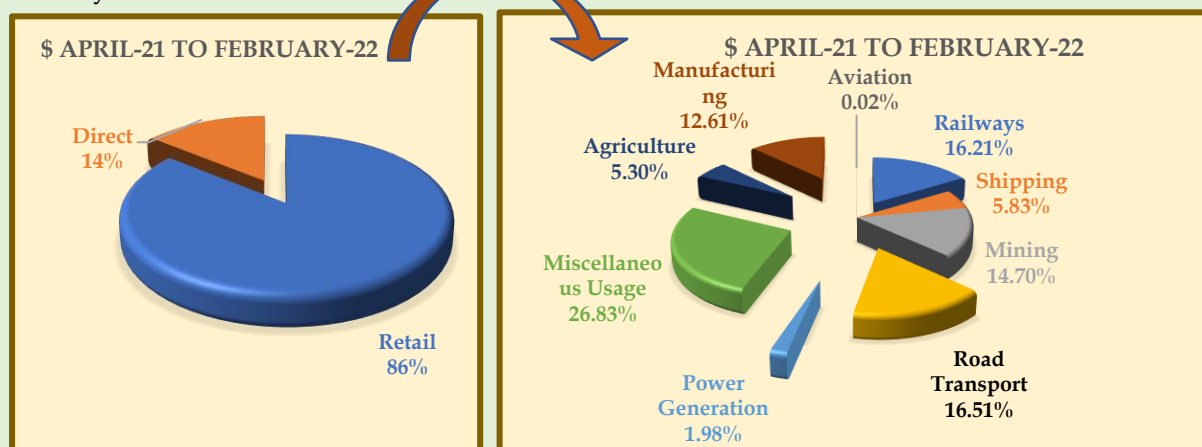
Sectoral consumption of HSD

The cumulative diesel sale during April-February-2023 was 78.1 MMT; 92% of which was constituted by retail sales. Balance 8% falls under direct sales category as shown in 5A/B chart. Whereas the bifurcation was 86:14 in FY2021-22.

In direct sales category, the sectoral consumption break up is shown in 5B chart with Miscellaneous

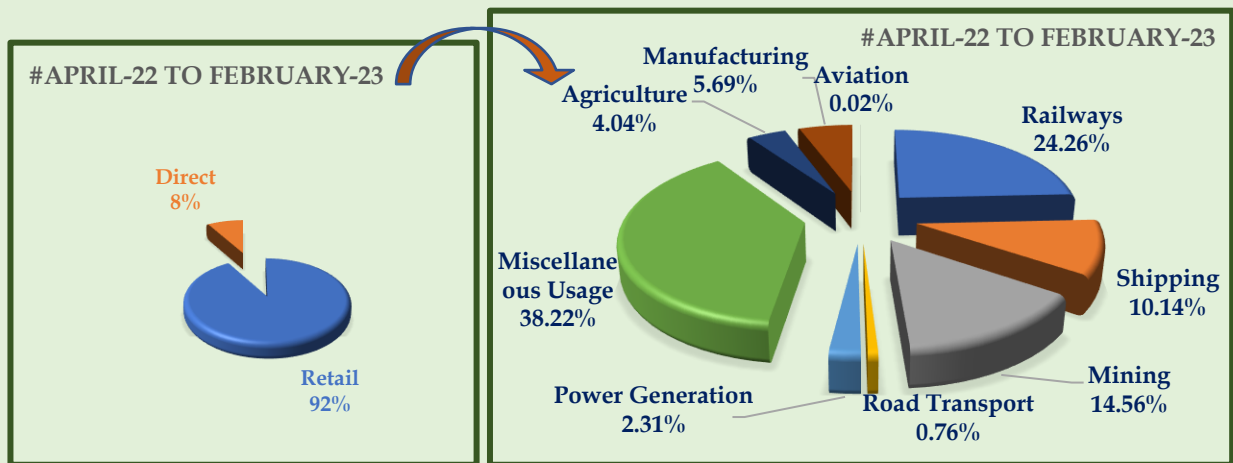
Usage (38.2%) followed by Railways 24.3%, Mining 14.6%, Shipping 10.1%, Manufacturing 5.7%, Agriculture 4.04%, Power Generation 2.31% and road transport 0.76%. Most of the retail sales are consumed in road transport. With respect to FY2021-22, sectoral consumption in FY2022-23 in Railways increased by 8 percentage points and shipping 5 percentage points. Details comparisons are pictorially presented in the following charts.

Figure-5A/B: sector-wise HSD consumption for April-22 to February 2023 (P) and its comparison with April-21 to February-22



*Manufacturing includes Electricals/electronics (0.09%), Iron & Steel plants (0.89%), Jute Mills (0.005%), Synthetic rubber and textiles (0.002%), Tobacco products (0.003%) etc.

**Miscellaneous Usage include Universities (0.041%), State electricity boards (0.031%), Posts & telegraphs (0.004%), Catering & hotels (0.068%) etc.



*Manufacturing includes Electricals/electronics (0.103%), Iron & Steel plants (0.717%), Jute Mills (0.003%), Synthetic rubber and textiles (0.002%), Tobacco products (0.001%) etc.
 **Miscellaneous Usage include Universities (0.027%), State electricity boards (0.048%), Posts & telegraphs (0.002%), Catering & hotels (0.039%) etc.

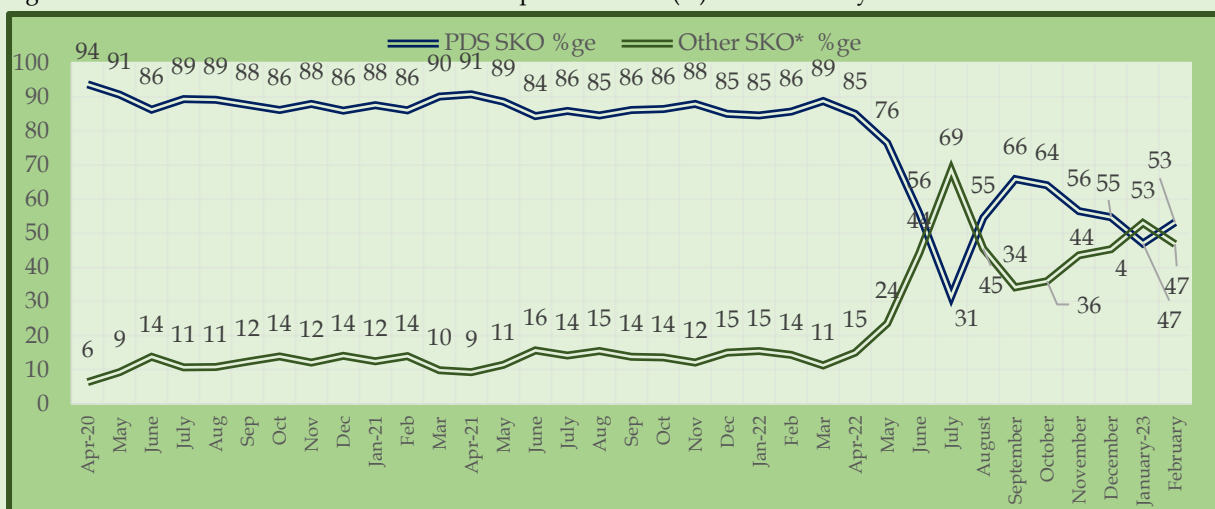
KEROSENE:

Kerosene consumption during February-2023 with a volume of 0.033MMT registered a de-growth of 71.6%, 75.7%, 82% & 87.8% over the volume of 0.117 MMT, 0.137MMT, 0.185MMT & 0.272MMT in February 2022, 2021, 2020 & 2019 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. According to MoPNG

circular dated 20th February the Q4 'subsidized PDS SKO allocation has been reduced to nil for the state of Gujrat.

A volume of 2216KL of non-subsidized PDSSKO sales has been registered during the month for the state of Karnataka (2180KL) and Kerala (36KL). In PDSSKO upliftment, West Bengal (6725 KL) was the biggest consumer followed by Tamil Nadu (4512KL) and Kerala (3720KL). The market share of subsidized-PDS and other SKO was 53% & 47% respectively.

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



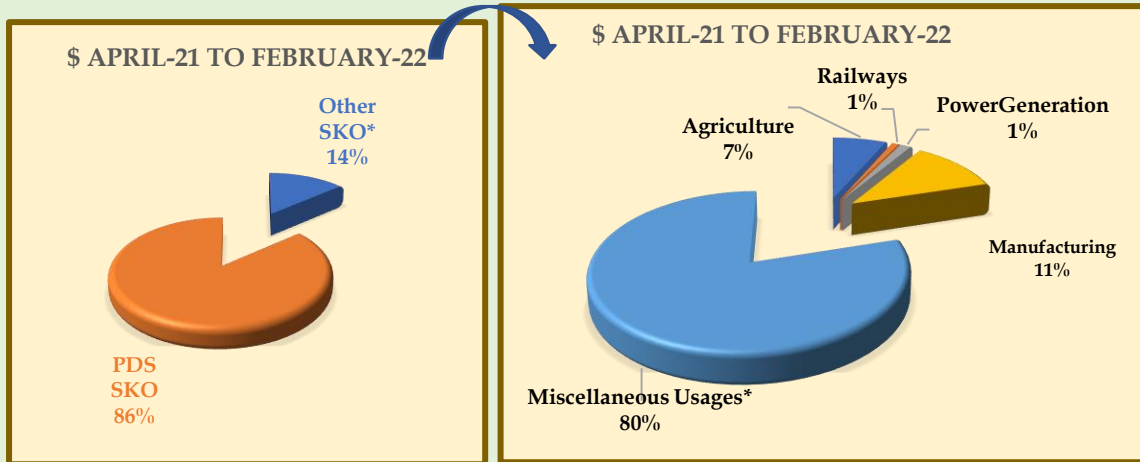
*Other SKO: non-subsidized PDS SKO +non-PDS kerosene

Sectoral consumption of SKO:

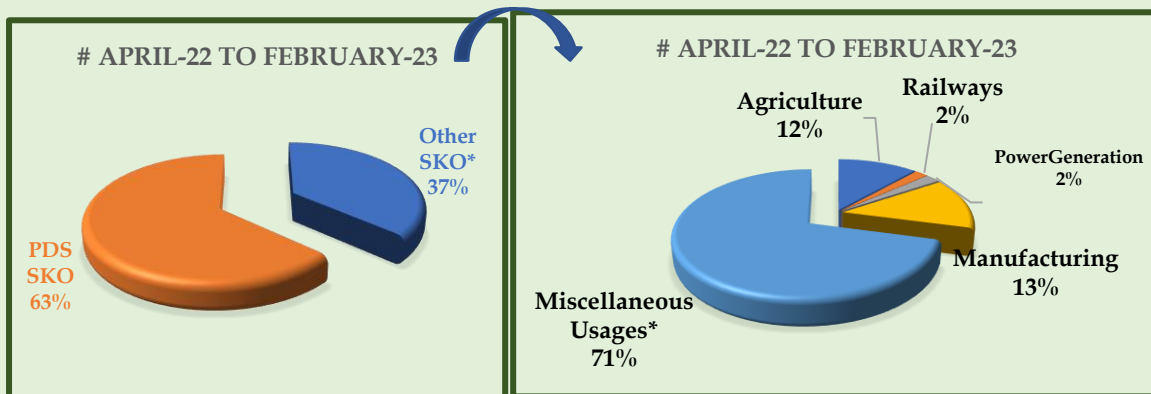
Out of total SKO sales during April-February-2023 with a volume of 0.46 MMT 'PDS domestic SKO' upliftment constituted to 63%. So far as SKO sales in 'non-PDS commercial sector is concerned,' 71% accounted to miscellaneous industries followed by

manufacturing 13%, agriculture 12%. With respect to FY2021-22, sectoral consumption in FY2022-23 in agriculture increased by 5 percentage points and manufacturing increased by 2 percentage points. Details comparisons are pictorially presented in the following charts.

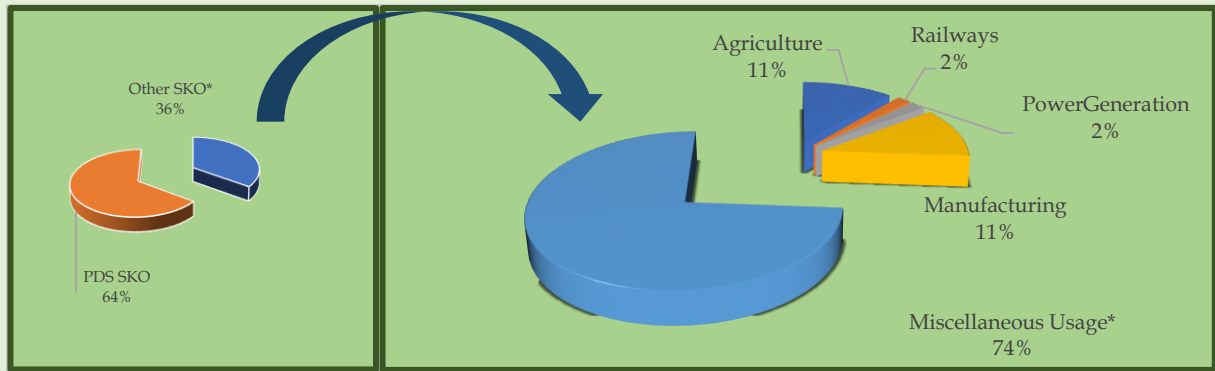
Figure-6A/B: PDS domestic, non-PDS commercial SKO sales & their breakup for April-22 to February 2023 (P) and its comparison with April-21 to February-22



\$. Other SKO includes 'Nonsubsidized PDS SKO', 'non-PDS SKO' and 'Imported SKO'
 **Miscellaneous Usage include 'Bitumen/Build material (4.85%), Synthetic Rubber & Fibre (0.08%), Atomic power plants & Power miscellaneous (0.06%), Iron & Steel (Metallurgy) (0.34%), Paints etc. (0.07%) and Fisheries (2.80%)



\$. Other SKO includes 'Nonsubsidized PDS SKO', 'non-PDS SKO' and 'Imported SKO'
 **Miscellaneous Usage include 'Bitumen/Build.Material (6.4%), Synthetic Rubber & Fibre (0.02%), Atomic power plants & Power miscellaneous (0.25%), Iron & Steel (Metallurgy) (0.54%), Paints etc. (0.11%) and Fisheries (4.41%)



Other SKO includes 'Nonsubsidized PDS SKO', 'non-PDS SKO' and 'Imported SKO'

**Miscellaneous Usage include 'Bitumen/Build. Material (3.22%), Synthetic Rubber & Fibre (1.14%), Atomic power plants & Power miscellaneous (0.20%), Iron & Steel (Metallurgy) (0.74%), Paints etc. (0.05%) and Fisheries (2.83%)

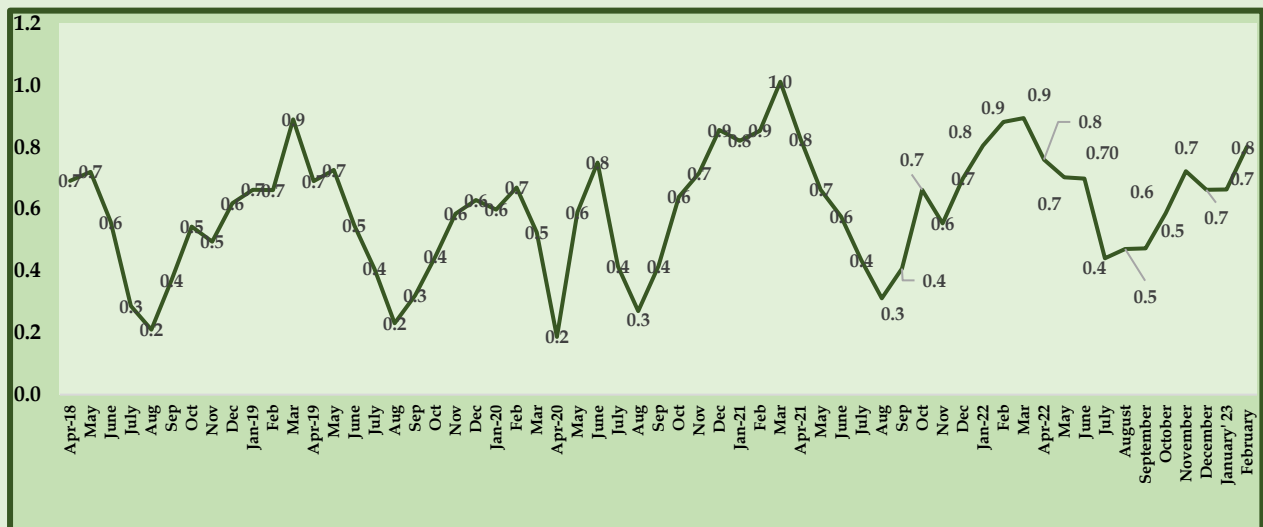
Figure-6A/B: PDS domestic, non-PDS commercial SKO sales & their breakup for April-February-2023

BITUMEN:

Bitumen consumption during February 2023 with a volume of 0.8 MMT recovered 90.6%, 93.9%, & 98.4% over a volume of 0.88 MMT, 0.85 MMT & 0.81 MMT in the month of February 2022, 2021, &

2020 respectively; however, it registered a growth of 21.1% over the volume of 0.661 MMT in February-2019.

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



Sectoral consumption of Bitumen:

Cumulative bitumen sales during April-22 to February-23 marked a volume of 6.9 MMT of which 97% was constituted to Road construction, balance 3% was consumed by miscellaneous industries.

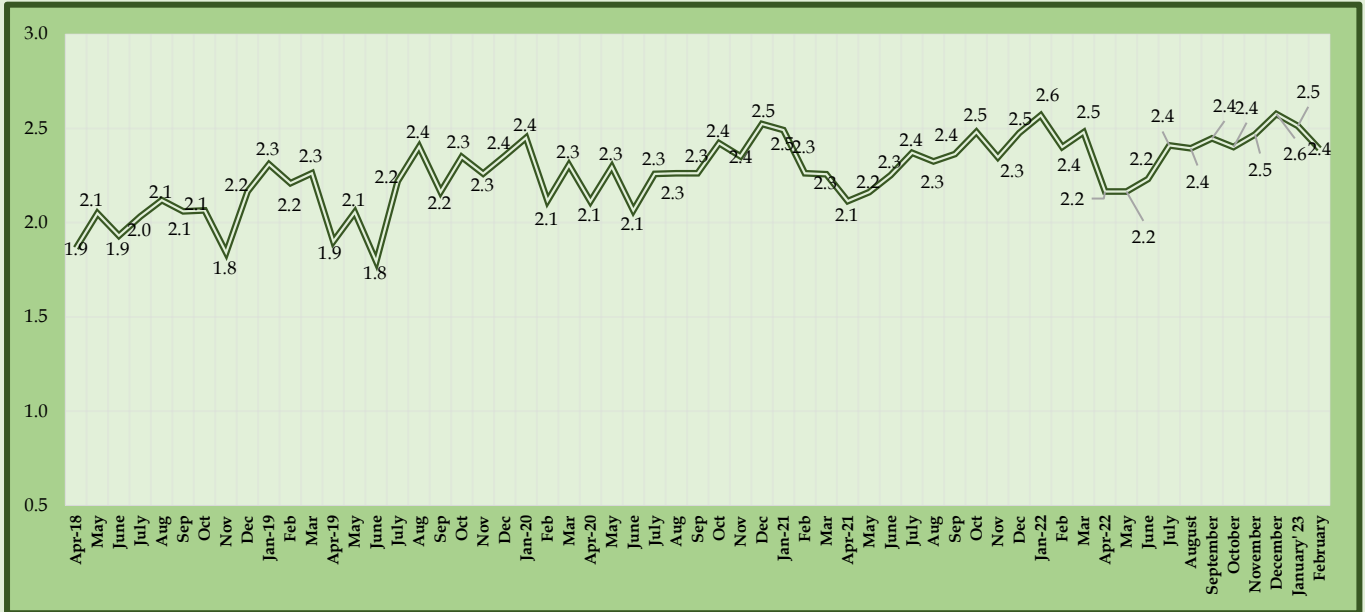


LPG:

LPG consumption during the month of February 2023 with a volume of 2.391MMT recovered 99.9% over the volume of 2.393MMT in February-2022. However, it registered a growth rate of 5.7 %, 13.6% & 8.2% over the volume of 2.26MMT, 2.11MMT & 2.21MMT in month of February 2021, 2020 & 2019 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 February 2018

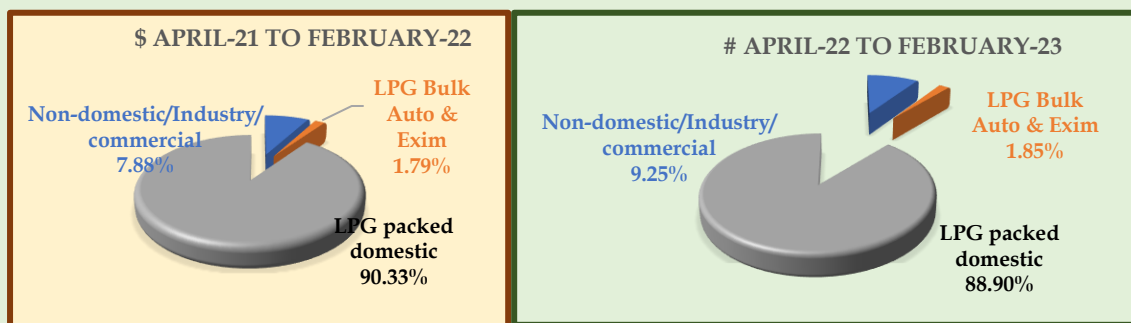


Sectoral consumption of LPG:

In April-22 to February-23 total LPG sale was 26 MMT driven by packed domestic category 88.9% followed by LPG Bulk Auto & Exim 1.85% & 'non-domestic/industry/commercial' sector 9.25%.

With respect to FY2021-22, sectoral consumption profile in FY2022-23 in LPG were remained almost the same pattern.

Figure-8A: Sector wise LPG consumption for April-22 to February 2023 (P) and its comparison with April-21 to February-22



NAPHTHA:

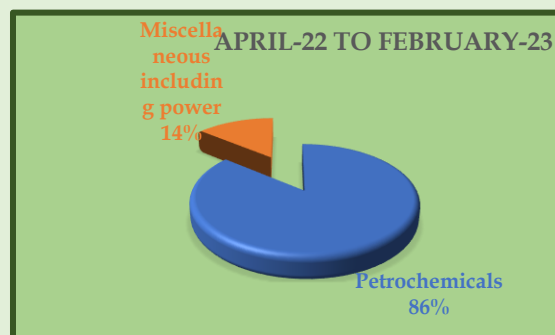
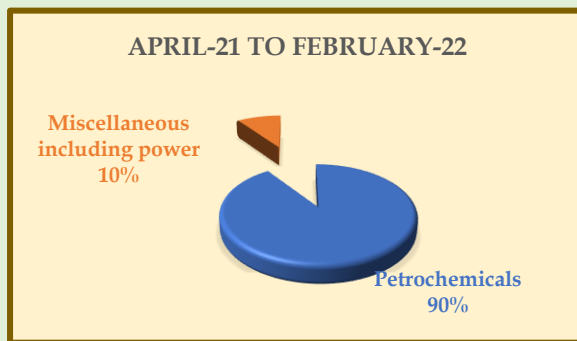
Naphtha consumption during the month of February 2023 with a volume of 1.06 MMT recovered 95.9% ,86.7%, 86.5 & 88% over the volume of 1.1MMT, 1.217MMT,1.219MMT & 1.199MMT in February2022, 2021, 2020 & 2019 respectively.

Petrochemical industries remain the main consumers of naphtha.

Consumption of naphtha during 'April-22 to February-23' with a volume of 11.04MMT was driven by petrochemicals sector 86%, whereas 14% naphtha consumption fell in 'miscellaneous industries including power'. With respect to FY2021-22, sectoral consumption in FY2022-23 in petrochemicals sector decreased by 4 percentage points. Details comparisons are pictorially presented in the following charts.

Sectoral consumption of Naphtha:

Figure-8A: Sector wise naphtha consumption for April-22 to February 2023 (P) and its comparison with April-21 to February-22



ATF:

ATF consumption during February 2023 with a volume of 0.623 MMT registered a growth of 43.2% and 44.2% over the volume of 0.435 MMT and 0.432MMT in February 2022 and 2021 respectively. However, it recovered 90.4% & 95% over the

volume of 0.689 MMT & 0.656MMT in February 2020 & 2019 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 February-2018 is depicted in the Figure-9.

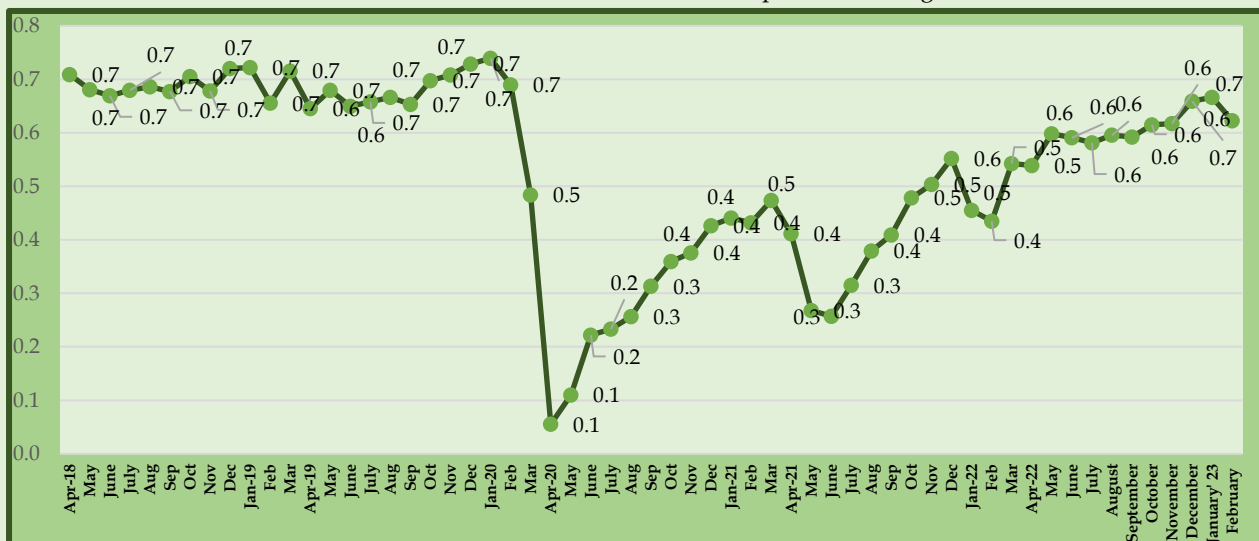
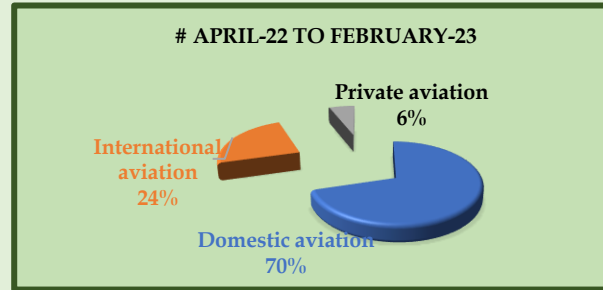
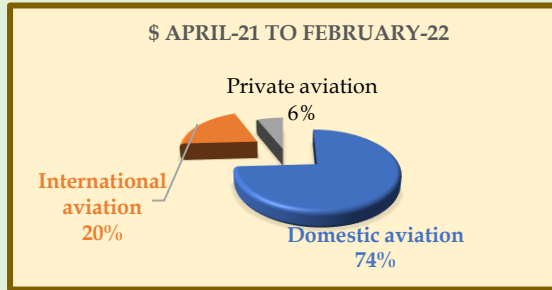


Figure-9: Month-wise ATF consumption (MMT) since February 2018

Sectoral consumption of ATF:

Almost entire ATF consumption during April-22 to February-23 with a volume of 6.7 MMT, attributed to aviation sector; 70% domestic aviation, 24% international aviation & 6% private

Figure-10A: Sector wise ATF consumption for April-22 to February 2023 (P) and its comparison with April-21 to February-22



aviation. With respect to FY2021-22, sectoral consumption in FY2022-23 in international aviation increased by 4 percentage points. Details comparisons are pictorially presented in the following charts.

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

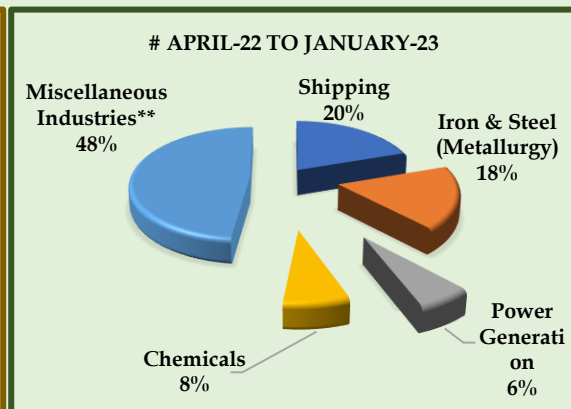
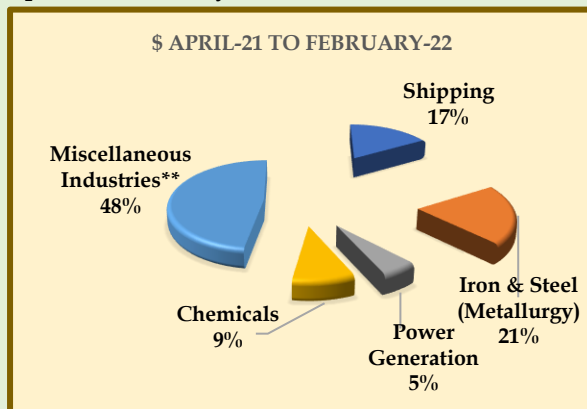
FO/LSHS consumption during February 2023 with a volume of 0.569 MMT recorded a growth rate of 7.2%, 19.5% & 7.3% year-to-year basis over volume of 0.5304MMT, 0.476MMT & 529.7MMT in the month of February 2022, 2021 & 2019 respectively. However, it recovered 96.8% over the volume of 0.587MMT in the month of February-2020. The higher growth rate is attributed to consumption shift from gas to LSHS in refining, chemical, glass sector. Though few companies shifted their internal fueling consumption from FO to CNG due to environmental obligations and to coal to ensure sustainability. Some mining companies' FO intake for the month was less due

to inventory limitations. Bunkering FO consumption in Chennai and Tuticorin was less during the month. Some aluminum industries started taking FO as their burning fuel.

Sectoral consumption of FO/LSHS:

Consumption of FO/LSHS during 'April-22 to February-23' with a volume of 6.4 MMT was driven by 'Miscellaneous industries' 48%, followed by 'shipping' 20% 'Iron & steel (metallurgy)' 18%, chemicals' 8% 'Power generation 6% as shown in the chart. With respect to FY2021-22, sectoral consumption in FY2022-23 in 'shipping' increased by 3 percentage points. Details comparisons are pictorially presented in the following charts.

Figure-10B: Sector wise FO+LSHS consumption for April-22 to February 2023 (P) and its comparison with April-21 to February-22



\$ *Miscellaneous usage includes 'Railways & Transport' (2.69%), Agriculture(1.16%), Civil Engineering (1.34%), Elec./Electronics(0.03%), Textile (0.55%), Mining (2.16%) etc.

*Miscellaneous usage includes 'Railways & Transport' (2.64%), Agriculture(0.78%), Civil Engineering (0.96%), Elec./Electronics(0.06%), Textiles (0.36%), Mining (1.35%) etc.

PETCOKE:

Petcoke consumption during the month of February 2023 with a volume of 1.493 MMT recovered 98.2%, 93.8% & 92.5% over volume of 1.52 MMT, 1.591MMT & 1.614 MMT in the month of February 2022,2020 and 2019 respectively. However, it marked a growth rate of 88.1% on year-to-year basis over a volume of 0.794MMT in February-2021.

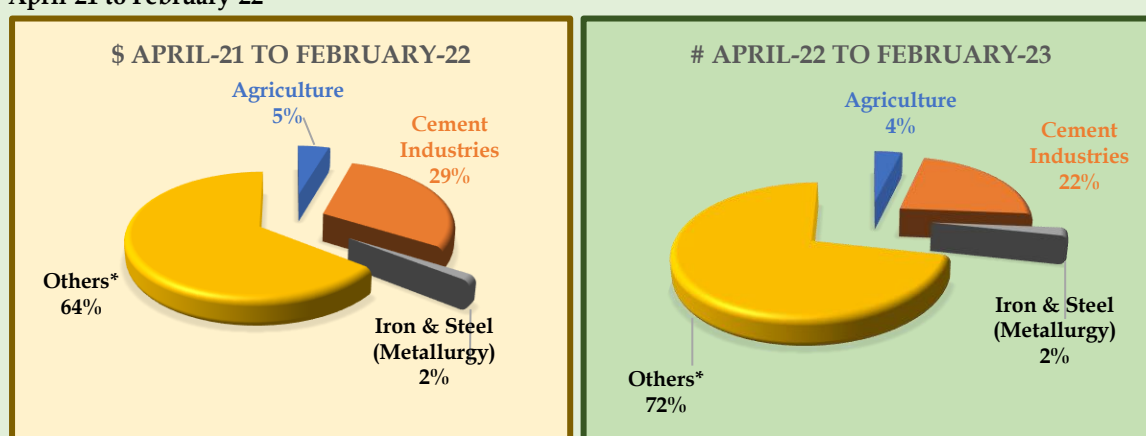
Directorate General of Foreign Trade (DGFT) under Ministry of Commerce and Industry has banned import of petcoke for use as fuel but has allowed its import only for use as feedstock in

some select industries such as cement, lime kiln, calcium carbide and gasification industries.

Sectoral consumption of Petcoke:

Petcoke consumption during 'April22 to February-23' was of 16.44MMT. The domestic sales driven by 'others 72%, followed by 'cement industries' 22%, Agriculture 4%. With respect to FY2021-22, sectoral consumption in FY2022-23 cement industries decreased by 7 percentage points. Details comparisons are pictorially presented in the following charts.

Figure-10A: Sector wise Petcoke consumption for April-22 to February 2023 (P) and its comparison with April-21 to February-22



*'Others' includes chemicals (5.1%), Textiles (0.5%), Mining (1.1%), Power Generation (0.2%) etc.

##'Others' includes chemicals (4.3%), Textiles (0.4%), Mining (1.2%), Power Generation (0.1%) etc.

LIGHT DIESEL OIL:

LDO consumption during the month February-2023 with a volume of 0.056 MMT recovered 66.1%, 70.6% & 93.5% on year-to-year basis over a volume of 0.085MMT, 0.080 MMT & 0.060 MMT in the month of February 2022,2021 & 2019 respectively. However, it registered a growth of 4% over the volume of 0.054 MMT in February-2020.

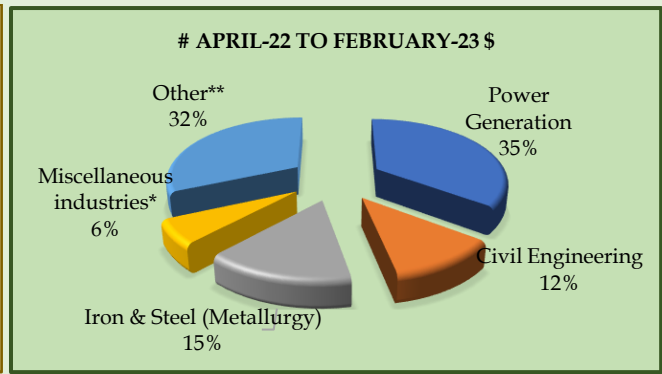
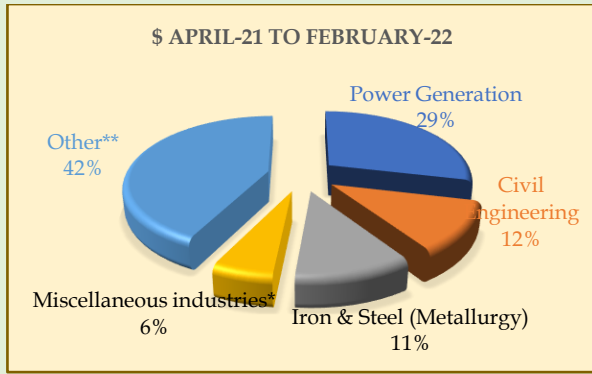
Sectoral consumption of Light Diesel Oil:

During April-22 to February-23, consumption of Light Diesel oil (LDO) with a volume of 0.647MMT was driven by 'Power Generation' 35% followed by 'Other' 32%, 'Iron& Steel (Metallurgy)' 15%, and Civil Engineering 12%. With respect to FY2021-22, sectoral consumption in FY2022-23 in power generation sector is increased by 6 percentage

points. Details comparisons are pictorially presented in the following charts.

LDO consumption was largely affected by available alternate fuel like FO&LSHS, LPG/CNG/ Fuel gas etc. and strategy taken by state governments to decrease emission. LDO consumption is banned in Delhi NCR, Haryana, Gujrat etc. LDO is being used to heat bitumen. De-growth in bitumen consumption effected LDO consumption in some parts of the country.

Figure-11: Sector wise LDO consumption for April-22 to February 2023 (P) and its comparison with April-21 to February-22



\$ *Miscellaneous industries include chemicals (3.27%), electrical & electronics (0.16%), Industrial goods (2.05%) and textiles (0.31%)
 **Other includes Road Transport (0.15%), Agriculture (1.75%), Mining (0.99%), Railways (0.02%) and shipping (0.4%) etc.

*Miscellaneous industries include chemicals (3.43%), electrical & electronics (0.38%), Industrial goods (2.23%) and textiles (0.32%)
 **Other includes Road Transport (0.22%), Agriculture (1.87%), Mining (1.79%), Railways (0.06%) and shipping (0.79%) etc.

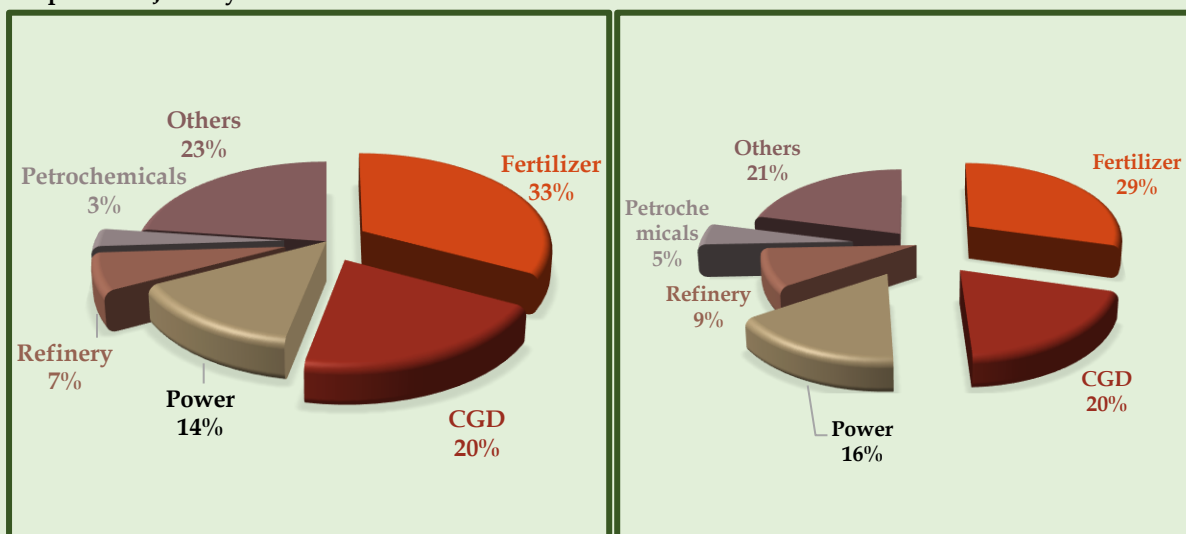
NATURAL GAS:

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 4.8 BCM (billion cubic meters) during the month of February 2023 registered 6.7% growth rate on volume of 4.5 BCM in the month of February 2022.

Sectoral consumption of Natural Gas April-January-23 & its YoY comparison: (PROVISIONAL)

During April-January 2023, consumption of Natural gas (NG) with a volume of 55.5 BCM was driven by the fertilizer (29%) followed by CGD (20%), Power (16%) Refinery (9%), Petrochemicals (5%) and others (21%). With respect to FY2021-22, sectoral consumption in FY2022-23 in fertilizer sector decreased by 4 percentage points where as CGD remained the same.

Figure-12: Sector wise consumption of Natural Gas for April-22 to January 2023 (P) and its comparison with April-21 to January-22



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

Source: PPAC data; P: provisional

\$ Totals may not tally due to rounding off. Based on information provided by ONGC, OIL, DGH, GAIL, Torrent Power Limited, Shell Energy India Pvt. Ltd., BPCL, RIL (P) and IOCL. Sectoral consumption data for GSPC is prorated for the April-September 2022 period. Components of internal consumption related to VAP shrinkage, LPG Shrinkage, Captive Power Generation, supply to power houses, supply to crematoriums & schools etc. as reported by ONGC, OIL & DGH (prorated) have been updated. Others includes sectors like Internal consumption for Pipeline System, Agriculture (Tea Plantation), Industrial, Manufacturing, LPG shrinkage, Sponge Iron and Miscellaneous.

#Totals may not tally due to rounding off. Based on information provided by ONGC, OIL, DGH, GAIL, Torrent Power Limited, Shell Energy India Pvt. Ltd., BPCL, RIL and IOCL. Sectoral consumption data for GSPC is prorated. Components of internal consumption related to VAP shrinkage, LPG Shrinkage, Captive Power Generation, supply to power houses, supply to crematoriums & schools etc. as reported by ONGC, OIL & DGH have been updated in the FY 2021-22.



Refinery visit IOCL Panipat

Conversion factors taken for MT 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- February			February		
	2021-22	2022-23	Growth(%)_ 2021-22 to 2022-23	2021	2022	Growth(%)_ 2021 to 2022
(A) Sensitive Products						
LPG	0.90	0.91	1.2	0.99	0.99	-0.1
SKO	0.03	0.01	-66.7	0.03	0.01	-71.6
Sub Total	0.93	0.92	-1.2	1.03	1.00	-2.4
(B) Major Decontrolled Product						
HSD	1.57	1.78	13.3	1.77	1.90	7.5
MS	0.74	0.85	14.1	0.81	0.88	8.9
Naphtha	0.32	0.29	-8.8	0.34	0.33	-4.1
ATF	0.11	0.16	49.5	0.13	0.18	43.2
Bitumen	0.12	0.12	-0.2	0.19	0.17	-9.4
FO/LSHS	0.11	0.13	12.2	0.13	0.14	7.2
Lubes+Greases	0.09	0.07	-15.4	0.10	0.09	-8.4
LDO	0.02	0.01	-30.8	0.02	0.01	-33.9
Sub Total	3.08	3.42	10.8	3.49	3.70	6.3
Sub - Total (A) + (B)	4	4	8.0	4.51	4.71	4.3
(C) Other Minor Decontrolled Products						
Pet.Coke	0.21	0.27	27.6	0.05	0.05	-1.8
Others*	0.27	0.33	24.0	0.04	0.05	35.8
Sub Total	0.48	0.61	25.6	0.09	0.10	13.1
Total	4	5	9.9	4.60	4.81	4.5
*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- February				February							
	2021-22	2022-23	Growth(%)_2022-23 over 2021-22	2019	2020	2021	2022	2023	Growth(%)_2023 over 2019	Growth(%)_2023 over 2020	Growth(%)_2023 over 2021	Growth(%)_2023 over 2022
(A) Sensitive Products												
LPG	25781	26097	1.2	2210	2106	2262	2393	2391	8.2	13.6	5.7	-0.1
SKO	1379	459	-66.7	272	185	137	117	33	-87.8	-82.0	-75.7	-71.6
Sub Total	27160	26556	-2.2	2481	2290	2399	2511	2425	-2.3	5.9	1.1	-3.4
(B) Major Decontrolled Product												
HSD	68954	78100	13.3	6737	7162	6569	6511	6997	3.86	-2.31	6.5	7.5
MS	27941	31868	14.1	2257	2511	2472	2550	2776	23.0	10.5	12.3	8.9
Naphtha	12114	11043	-8.8	1199	1219	1217	1100	1055	-12.0	-13.5	-13.3	-4.1
ATF	4465	6678	49.5	656	689	432	435	623	-5.0	-9.6	44.2	43.2
Bitumen	6873	6856	-0.2	661	814	853	884	801	21.1	-1.6	-6.1	-9.4
FO/LSHS	5672	6363	12.2	530	587	476	530	569	7.3	-3.2	19.5	7.2
Lubes+Greases	4002	3386	-15.4	294	321	388	380	348	18.4	8.3	-10.3	-8.4
LDO	935	647	-30.8	60	54	80	85	56	-6.5	4.0	-29.4	-33.9
Sub Total	130957	144940	10.7	12393	13357	12485	12475	13223	6.7	-1.0	5.9	6.0
(C) Other Minor Decontrolled Products												
Sub - Total (A) + (B)	158117.4	171496.7	8.5	14873.9	15647.7	14884.3	14985.3	15647.7	5.2	0.0	5.1	4.4
Pet.Coke	12882	16440	27.6	1614	1591	794	1520	1493	-7.5	-6.2	88.1	-1.8
Others*	11181	13859	24.0	953	866	993	992	1347	41.4	55.5	35.7	35.8
Sub Total	24063	30299	25.9	2567	2457	1786	2512	2840	10.6	15.6	59.0	13.1
Total	182181	201796	10.8	17441	18105	16671	17497	18488	6.0	2.1	10.9	5.7

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



PPAC conducts workshop on 'International Women's Day'



Interaction among DG-PPAC, HoD-D&ES-I/C & Director, IIT Delhi



Interaction among Sh. Kirit Parikh, DG-PPAC & HOD-Supply-I/C

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