सत्यमेव जयते

LPG Profile Report

[Q1 FY 2024-25]

PPAC

Analysis • Knowledge • Information

Petroleum Planning & Analysis Cell

(Ministry of Petroleum and Natural Gas, Government of India)

Suggestions and Feedback

Readers are invited to send their suggestions & feedback for improvement of the document to:

Jagdish Chander, Additional Director (Marketing & Quality Assurance)
Petroleum Planning & Analysis Cell (PPAC)
(Ministry of Petroleum & Natural Gas, Government of India)
SCOPE Complex, 2nd Floor, Core 8,
Lodhi Road, New Delhi-110003
Email: jagd.chan@ppac.gov.in

Ravindra Kumar, Joint Director (Marketing)
Email: ravindra.kumarrajput@ppac.gov.in

Acknowledgement

PPAC thanks IOCL, BPCL and HPCL for providing useful inputs for inclusion in this document.

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Executive Summary

This report has been compiled on the basis of information furnished by the three PSU Oil Marketing Companies (IOCL, BPCL & HPCL). The salient points on LPG marketing as brought out in the LPG Profile for Apr 2024 - June 2024 (i.e. as on 1st July 2024) are as under: -

1. As on 1.7.2024 PSU OMCs (IOCL, BPCL and HPCL) together have 32.68 crore active LPG customers in the domestic category who are being served by 25,495 LPG distributors.

2. PSU OMCs enrolled 10.21 lakh new domestic customers in Q1 FY 2024-25. During the same period, PSU OMCs have added 14 distributorships. As on 1.7.2024, PSU OMCs have 7921 Shehri Vitraks, 3758 Rurban Vitraks, 11785 Gramin Vitraks and 2031 Durgam Kshetriya Vitraks across the country.

3. PSU OMCs sold nearly 7.2 MMT (including propane & Butane in bulk LPG) of LPG in Q1 FY 2024-25 out of which about 89.5% was sold in the domestic sector. During the said period recorded a growth of 4.7% in total LPG sales as compared to Q1 FY 2023-24.

4. PSU OMCs have a total of 211 LPG bottling plants all over India with rated bottling capacity of around 23.0 MMTPA (million metric tonne per annum).

5. The total gross LPG tankage on all-India basis is around 1288.1 TMT which is equivalent to about 16 days cover (per day consumption 79.1 TMT).

6. PSU OMCs have a total of 448 (including 3 ALDS with nil sales) Auto LPG Dispensing Stations (ALDS) all over India for catering to LPG demand in the automotive sector. The total auto LPG sales of PSU OMCs was about 18.2 TMT in Q1 FY 2024-25 out of which around 84.0% sales were in the Southern region.

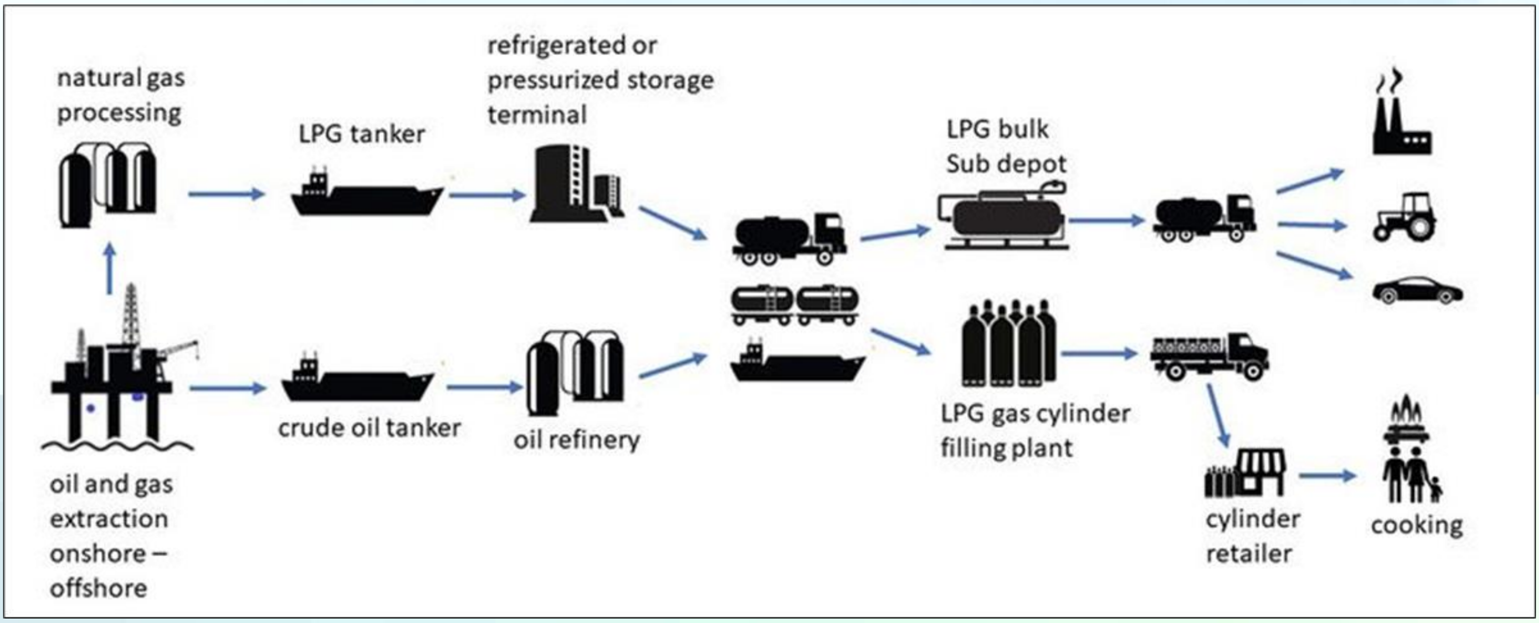
7. As on 1.7.2024, the PMUY scheme (Ujjwala 1.0, 2.0 & extended) has covered around 10.33 crore beneficiaries since its launch in May 2016, the highest percentage of PMUY connections since inception of the scheme on 1.5.2016 have been released in Eastern region (32.4%), followed by Northern region (29.7%), Western region (21.5%), Southern region (10.5%) and North-east region (6.0%).

8. As on 1.7.2024, total 74.62 lakhs connections have issued under PMUY-II extended scheme.

9. As on 1st July 2024, total share of PMUY connections is 31.6 % out of total active domestic connections in the country.

Chapter-1

LPG Infrastructure



1. Growth in LPG marketing of PSU OMCs

Figure 1: Number of active domestic LPG customers (In Crs) as on 1st April

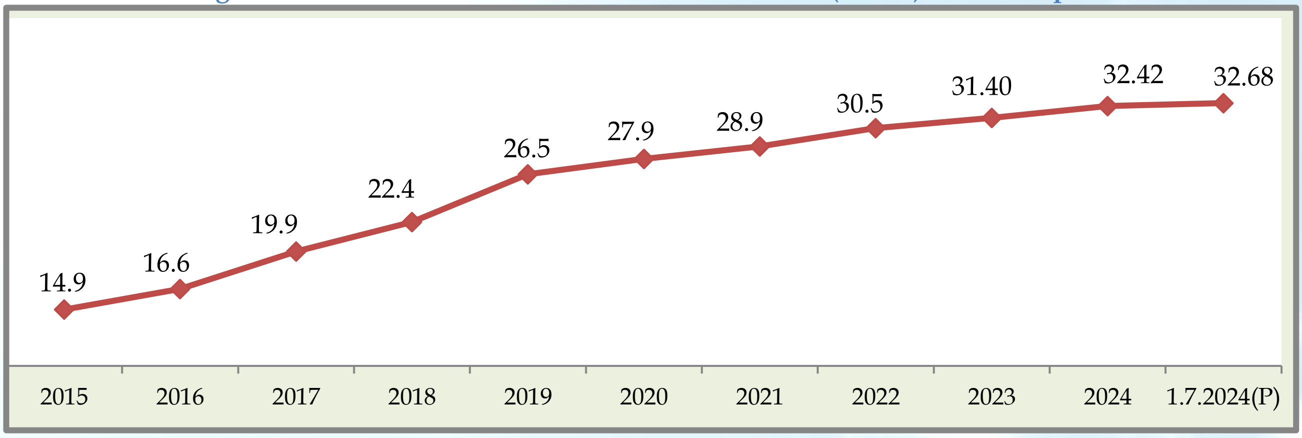
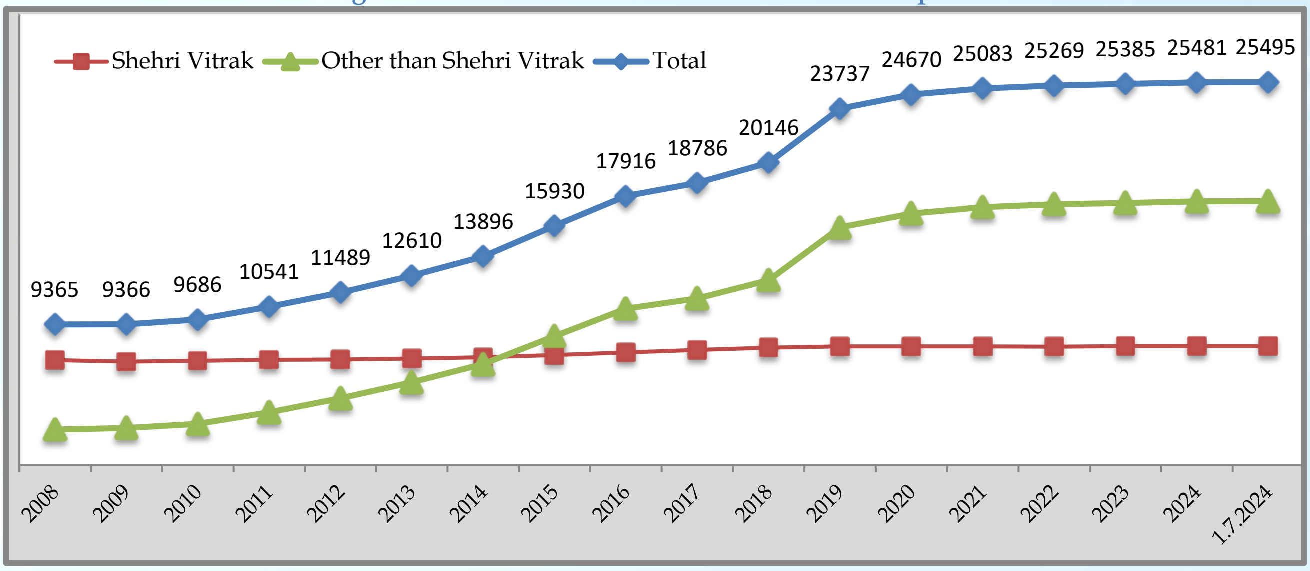


Figure 2: Number of LPG distributors as on 1st April



- LPG coverage (calculated on the basis of active domestic connections and estimated households using 2011 Census figures and taking 2001-11 decadal population growth) jumped from 56.2% in April 2015 to 61.9% in April 2016, 72.8% in April 2017, 80.9% in April 2018, 94.3% in April 2019,97.5% in April 2020 and further to 99.8% in April 2021. This reflects the mission mode of the Government towards increasing LPG penetration. "The *LPG coverage is calculated by PSU OMCs based upon the active LPG domestic connections and the estimated number of households. The number of households has been projected by PSU OMCs based on 2011 census data.*
- Active domestic LPG customers of PSU OMCs have increased at a CAGR of around 8.2% during 2015 - 1.7.2024. As on 1.7.2024, PSU OMCs have 32.68 crore active LPG domestic customers as compared to 14.9 crore on 1.4.2015.
- The total number of LPG distributors of PSU OMCs has increased at a CAGR of around 6.1% during 2008-1.7.2024. As on 1.7.2024, PSU OMCs have 25495 LPG Distributors for domestic LPG as compared to 9365 on 1.4.2008.
- Gross LPG tankage on Industry basis has increased from 612 TMT in April 2007 to 1288.1 TMT as on 1st July 2024. However, PSU OMCs' daily LPG sales have jumped from 29 TMT to around 79.1 TMT during the above-mentioned period. Hence the days cover on

gross tankage basis has decreased from 21 days to approximately 16 days during the said period.

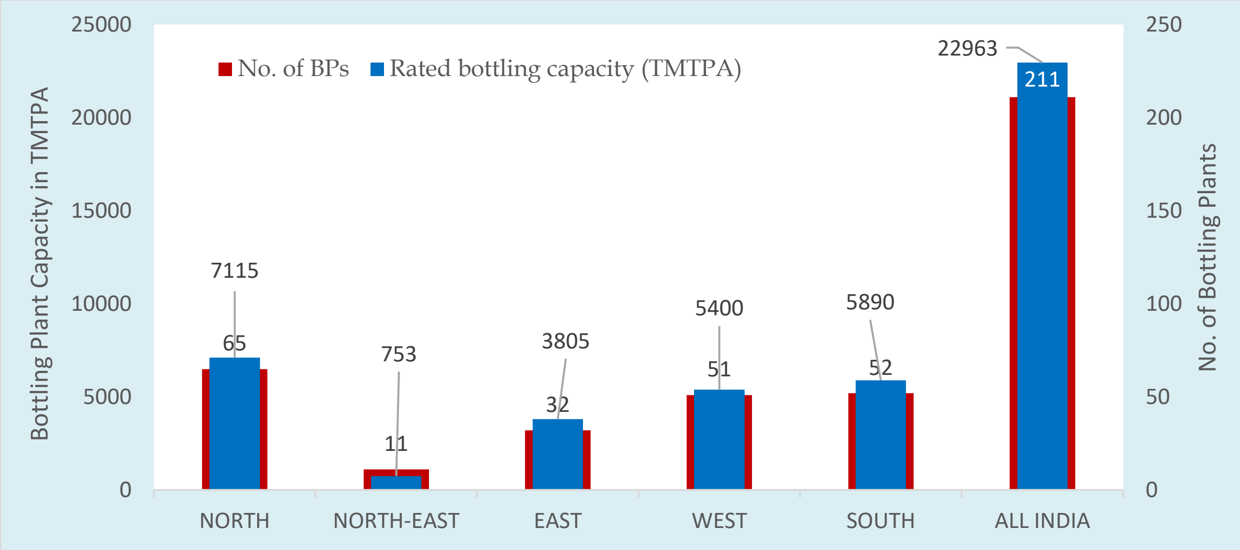
Table 1: LPG marketing at a glance

Particulars (As on 1st of April)	UNIT	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	1.7.24 (P)
LPG Active Domestic Customers	(Lakh)								1486	1663	1988	2243	2654	2787	2895	3053	3140	3242	3268
	Growth									11.9%	19.6%	12.8%	18.3%	5.0%	3.9%	5.5%	2.9%	3.2%	3.7%
LPG Coverage (Estimated)	(Percent)								56.2	61.9	72.8	80.9	94.3	97.5	*99.8	*99.8	-	-	-
PMUY Beneficiaries	(Lakh)										200.3	356.0	719.0	801.6	800.4	899.0	958.6	1032.7	1033.0
	Growth											77.7%	102%	11.5%	-0.2%	12.3%	6.6%	7.7%	7.8%
Non-domestic LPG customers	(Lakh)	7.9	10.6	12.8	15	16.2	18.9	20.1	21.1	23.3	25.3	27.9	30.2	32.4	33.9	35.2	35.9	36.6	36.8
	Growth	20.5%	34.5%	20.6%	17.4%	7.7%	16.9%	6.2%	5.1%	10.3%	8.9%	10.3%	8.5%	7.0%	4.9%	3.7%	2.0%	2.0%	2.0%
LPG Sales (Domestic)	(MMT)	10.3	10.6	11.4	12.4	13.3	13.6	14.4	16	17.2	18.9	20.3	21.7	23.1	25.1	25.5	25.4	26.2	6.3
	Growth	5.6%	2.9%	7.5%	8.8%	7.3%	2.3%	5.9%	11.1%	7.5%	9.9%	7.6%	6.8%	6.2%	8.9%	1.5%	-0.5%	3.3%	5.3%
Enrolment (Domestic)	(Lakh)	64.9	53.2	86.2	104.2	122.7	131.6	159.1	163.4	204.5	331.7	284.7	455.1	161.1	85.8	158.4	101.2	112.5	10.2
	Growth	20.6%	-18.0%	62.0%	20.9%	17.8%	7.3%	20.9%	2.7%	25.2%	62.2%	-14.2%	59.9%	-64.6%	-46.7%	84.5%	-36.1%	11.2%	7.1%
LPG Distributors	(No.)	9365	9366	9686	10541	11489	12610	13896	15930	17916	18786	20146	23737	24670	25083	25269	25385	25481	25495
(See Notes)	Growth	0.0%	0.0%	3.4%	8.8%	9.0%	9.8%	10.2%	14.6%	12.5%	4.9%	7.2%	17.8%	3.9%	1.7%	0.7%	0.5%	0.4%	0.4%
Auto LPG Dispensing Stations	(No.)	327	447	536	604	652	667	678	681	676	675	672	661	657	651	601	526	468	448
	Growth	48.6%	36.7%	19.9%	12.7%	7.9%	2.3%	1.6%	0.4%	-0.7%	-0.1%	-0.4%	-1.6%	-0.6%	-0.9%	-7.7%	-12.5%	-11.0%	-9.7%
Bottling Plants	(No.)	181	182	182	183	184	185	187	187	188	189	190	192	196	200	202	208	210	211
	Growth	0.0%	0.6%	0.0%	0.5%	0.5%	0.5%	1.1%	0.0%	0.5%	0.5%	0.5%	1.1%	2.1%	2.0%	1.0%	3.0%	1.0%	1.4%
Gross Tankage	(000' MT)	670	672	669	687	711	771	777	781	869	878	912	929	978	994	1088	1178	1241	1288.1
	Growth	9.4%	0.3%	-0.4%	2.8%	3.0%	8.4%	0.7%	0.5%	11.3%	1.1%	3.9%	2.0%	5.3%	1.6%	9.5%	8.2%	5.3%	9.2%
Days cover on gross tankage basis	(Days)	22	21	19	18	17	19	18	16	17	15	14	14	14	13	14	15	15	16
	Growth	1.5%	-4.5%	-9.5%	-5.3%	-5.6%	11.8%	-5.3%	-11.1%	6.3%	-11.8%	-6.7%	0.0%	-2.8%	-3.8%	6.2%	5.4%	2.3%	3.4%

Notes: a. Growth rates as on 1.7.2024 are w.r.t. figs as on 1.7.2023.
Growth rates as on 1st April of any year are w.r.t. figures as on 1st April of previous year.
b. The number of LPG distributorships of PSU OMCs as on 1.7.2024 as per the 2016 Unified guidelines for selection of LPG distributors are: Shehri (7921), Rurban (3758), Gramin (11785) and Durgam (2031).
c. LPG Sales (domestic) and enrolment (domestic) as on 1.7.24 refers to the period Apr'24-Jun'24.
* "The LPG coverage is calculated by PSU OMCs based upon the active LPG domestic connections and the estimated number of households. The number of households has been projected by PSU OMCs based on 2011 census data. Factors like increasing nuclearization of families, migration of individuals/ families due to urbanization and reduction in average size of households etc., impact the growth of number of households. Due to these factors, the estimated no. of households through projection of 2011 census data may slightly differ from the actual no. of households in a State/UT".
Source: PSU OMCs.

2. LPG bottling plants and bottling capacity

Figure 3 : Regional distribution of LPG bottling plants as on 1.7.2024



- PSU OMCs bottle at 211 LPG bottling plants owned by PSU oil companies which have an operating capacity of 23.0 TMTPA as on 1st July 2024. PSU OMCs also take assistance from private players in a few areas. Northern region has the highest number of LPG bottling plants and LPG bottling capacity. PSU OMCs do not have any own LPG plant in Chandigarh, Arunachal Pradesh, Meghalaya, Mizoram, Dadra & Nagar Haveli and Daman & Diu and Lakshadweep. They serve these states/UTs from their LPG plants located in neighboring states/UTs.

Table 2 :Number of bottling plants & bottling capacity as on 1.7.2024 (P)

State/UT	No. of Bottling Plants	Bottling Capacity (TMTPA)
Chandigarh	0	0
Delhi	2	480
Haryana	5	840
Himachal Pradesh	2	90
Jammu & Kashmir	3	180
Ladakh	1	5
Punjab	8	960
Rajasthan	12	1170
Uttar Pradesh	28	3150
Uttarakhand	4	240
Sub Total North	**65**	**7115**
Arunachal Pradesh	0	0
Assam*	7	630
Manipur	1	30
Meghalaya	0	0
Mizoram	0	0
Nagaland	1	22
Sikkim	1	11
Tripura	1	60
Sub Total North-East	**11**	**753**
Andaman & Nicobar Islands	1	15
Bihar	9	1230
Jharkhand	5	480
Odisha	6	510
West Bengal	11	1570
Sub Total East	**32**	**3805**
Chhattisgarh	4	330
Dadra & Nagar Haveli and Daman & Diu	0	0
Goa	2	90
Gujarat	11	1140
Madhya Pradesh	11	1050
Maharashtra	23	2790
Sub Total West	**51**	**5400**
Andhra Pradesh	9	1020
Karnataka	11	1570
Kerala	7	690
Lakshadweep	0	0
Puducherry	1	60
Tamil Nadu **	19	1830
Telangana	5	720
Sub Total South	**52**	**5890**
All India	**211**	**22963**

* Includes Numaligarh BP

** Includes CPCL BP

^TMTPA: Thousand metric tonne per annum

Operating Bottling Capacity is based on number of shifts presently in operation at plant

3. Industry LPG tankage

Figure 4: Region-wise distribution of LPG tankage (TMT, %) as on 1.7.2024

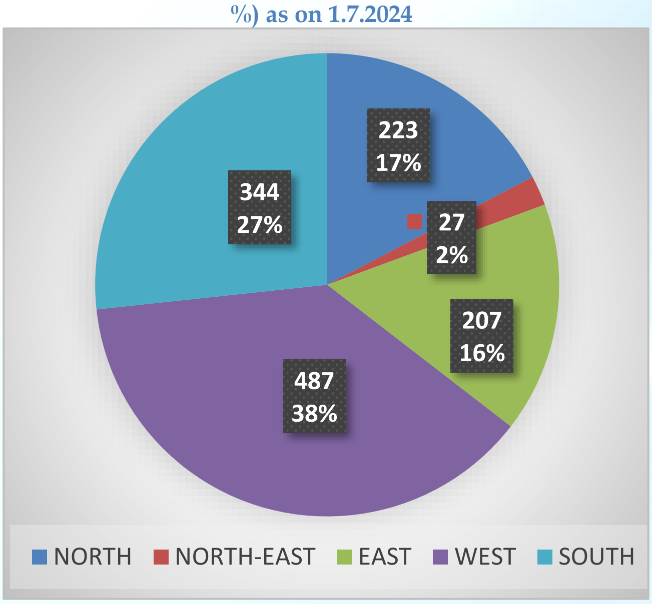


Figure 5: Distribution of LPG tankage source-wise as on 1.7.2024

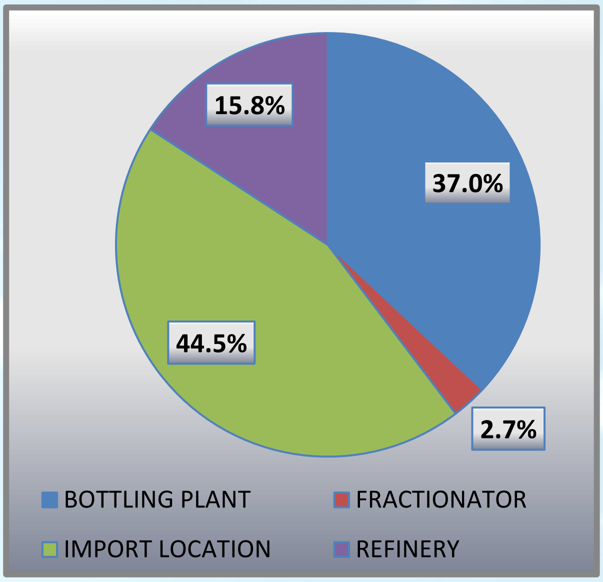
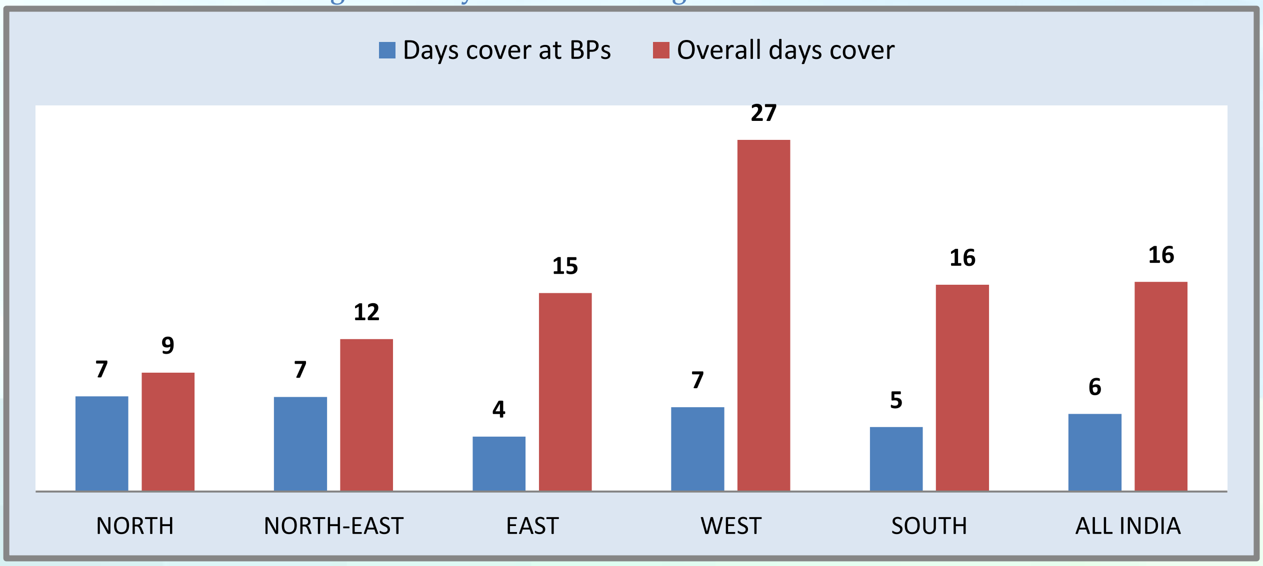


Figure 6 : Days cover on tankage basis as on 1.7.2024



- LPG import locations account for around 44.6% of the total LPG tankage followed by 36.9% at LPG bottling plants, 15.8% at refineries and 2.7% at fractionators. Western Region dominates other regions in terms of overall LPG tankage. This region has all the four types of tankages. This region has a number of LPG import locations and refineries. Majority of the fractionators are located in the Western region.

- LPG tankage at bottling plants is critical to ensure continuity of operation of a bottling plant at its full capacity especially in respect of North-Eastern region. The tankage at LPG bottling plants in all the regions varies from 4 to 7 days cover with All India figure of 6 days' cover. LPG tankage at all sources combined, varies from 9 days to 27 days cover with an All-India average of 16 days' cover.

Table 3 :Industry LPG tankage as on 1.7.2024 (P)

Figures in Thousand metric tonne

State/UT	Grand Total
Chandigarh	0.0
Delhi	12.4
Haryana	32.1
Himachal Pradesh	2.1
Jammu & Kashmir	7.4
Ladakh	3.3
Punjab	54.5
Rajasthan	22.7
Uttar Pradesh	83.2
Uttarakhand	5.2
Sub Total North	**222.8**
Arunachal Pradesh	0.0
Assam	22.2
Manipur	0.4
Meghalaya	0.0
Mizoram	0.0
Nagaland	1.8
Sikkim	1.4
Tripura	1.1
Sub Total North-East	**26.8**
Andaman & Nicobar Islands	0.3
Bihar	21.3
Jharkhand	7.5
Odisha	64.0
West Bengal	114.3
Sub Total East	**207.4**
Chhattisgarh	9.0
Dadra & Nagar Haveli and Daman & Diu	0.0
Goa	1.0
Gujarat	323.1
Madhya Pradesh	51.3
Maharashtra	102.9
Sub Total West	**487.3**
Andhra Pradesh	92.2
Karnataka	62.7
Kerala	69.6
Lakshadweep	0.0
Puducherry	3.3
Tamil Nadu	104.2
Telangana	11.9
Sub Total South	**343.9**
All India	**1288.1**

Chapter-2

Marketing and Sales

4. LPG distributors

Figure 7: Region-wise distribution of distributors

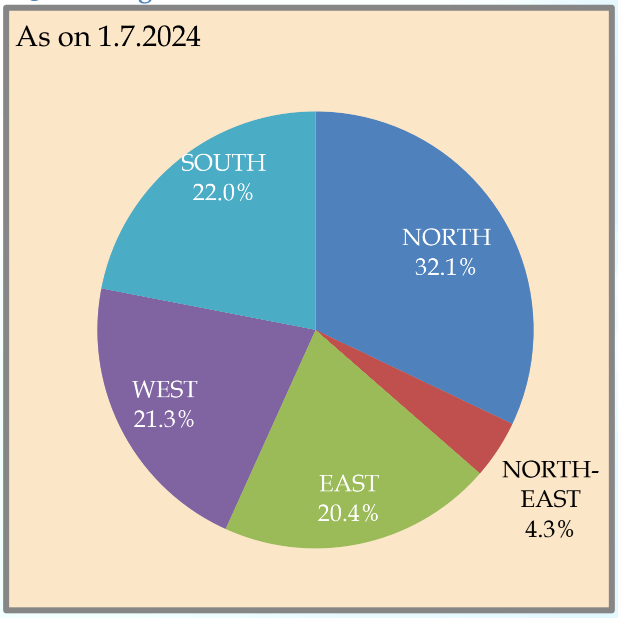


Figure 8: Category wise distribution of distributors

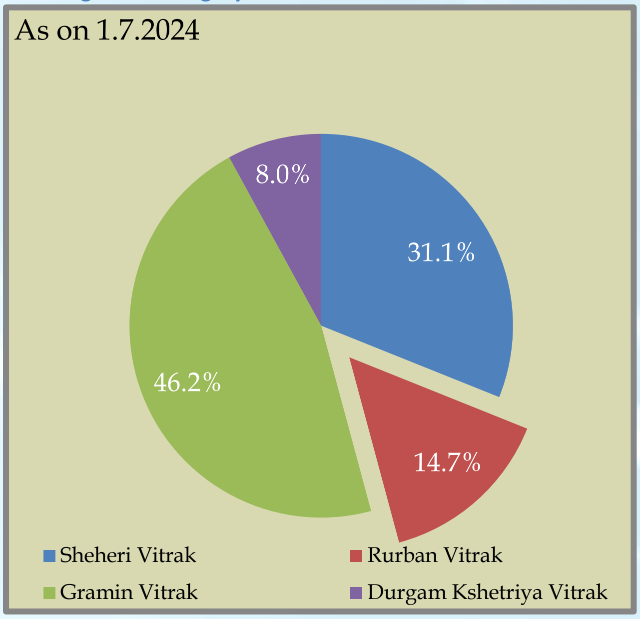
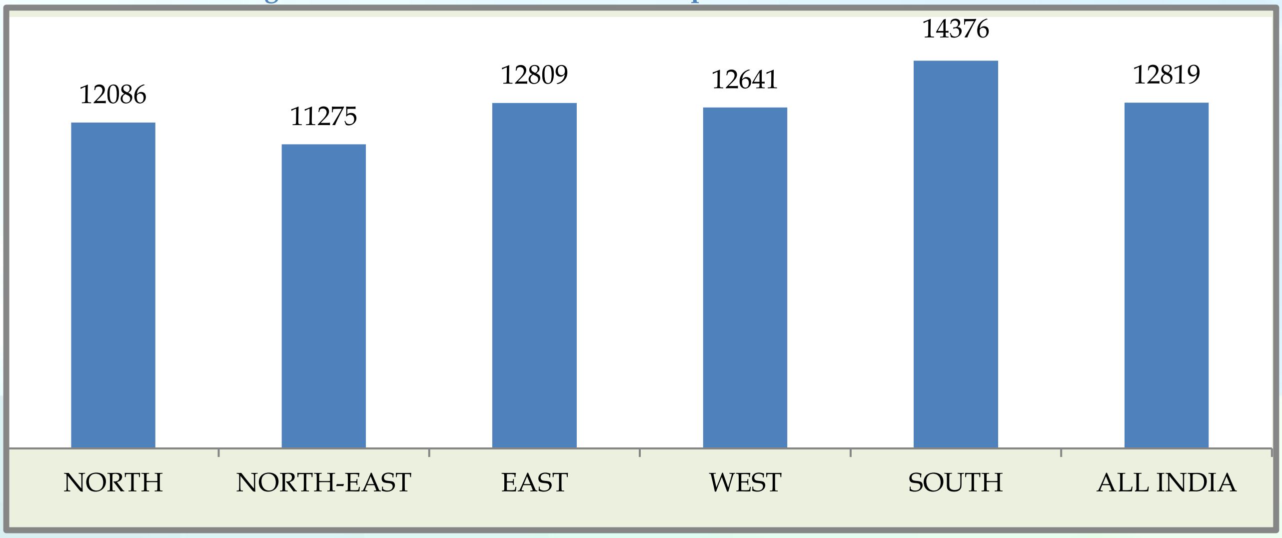


Figure 9: Active domestic consumers per distributor as on 1.7.2024



- Northern region has the highest percentage (32.1%) of LPG distributors followed by Southern (22.0%), Western (21.3 %), Eastern (20.4%) and North-Eastern region (4.3%).

- An LPG distributor on an average caters to around 12819 active domestic consumers on an All-India basis. This figure is highest in Southern region (14376) followed by Eastern (12809), Western (12641), and Northern region (12086) but is much lower in North-Eastern region (11275).

- PSU OMCs have added 14 distributorships in Q1 FY 2024-25 and 13 distributorships during the same period of last year Q1 FY 2023-24

Figure 10: Number of LPG distributors as on 1.7.2024 (P)

Figure in Numbers

State/UT	Sheheri Vitrak	Rurban Vitrak	Gramin Vitrak	Durgam Kshetriya Vitrak	Total
Chandigarh	26	0	0	0	26
Delhi	317	0	0	0	317
Haryana	282	103	232	9	626
Himachal Pradesh	69	13	91	36	209
Jammu & Kashmir	125	34	74	40	273
Ladakh	0	13	2	9	24
Punjab	334	256	249	21	860
Rajasthan	434	163	654	133	1384
Uttar Pradesh	1008	706	2307	122	4143
Uttarakhand	114	104	59	40	317
Sub Total North	**2709**	**1392**	**3668**	**410**	**8179**
Arunachal Pradesh	6	6	33	40	85
Assam	128	101	307	61	597
Manipur	15	13	36	38	102
Meghalaya	21	9	19	16	65
Mizoram	11	6	26	16	59
Nagaland	15	11	17	40	83
Sikkim	9	1	9	10	29
Tripura	18	8	46	11	83
Sub Total North-East	**223**	**155**	**493**	**232**	**1103**
Andaman & Nicobar Islands	0	4	5	1	10
Bihar	240	252	1502	39	2033
Jharkhand	163	51	354	20	588
Odisha	173	100	578	114	965
West Bengal	405	164	951	74	1594
Sub Total East	**981**	**571**	**3390**	**248**	**5190**
Chhattisgarh	105	75	172	182	534
Dadra & Nagar Haveli and Daman & Diu	5	1	1	0	7
Goa	44	4	5	2	55
Gujarat	422	120	486	13	1041
Madhya Pradesh	472	210	484	385	1551
Maharashtra	1008	192	846	191	2237
Sub Total West	**2056**	**602**	**1994**	**773**	**5425**
Andhra Pradesh	322	289	427	108	1146
Karnataka	534	139	547	52	1272
Kerala	225	133	320	22	700
Lakshadweep	1	0	0	0	1
Puducherry	15	11	3	0	29
Tamil Nadu	566	362	611	107	1646
Telangana	289	104	332	79	804
Sub Total South	**1952**	**1038**	**2240**	**368**	**5598**
All India	**7921**	**3758**	**11785**	**2031**	**25495**

5. Domestic LPG sales

Figure 11: Region-wise % of Packed Domestic LPG sales of PSU OMCs in Q1 FY 2024-25

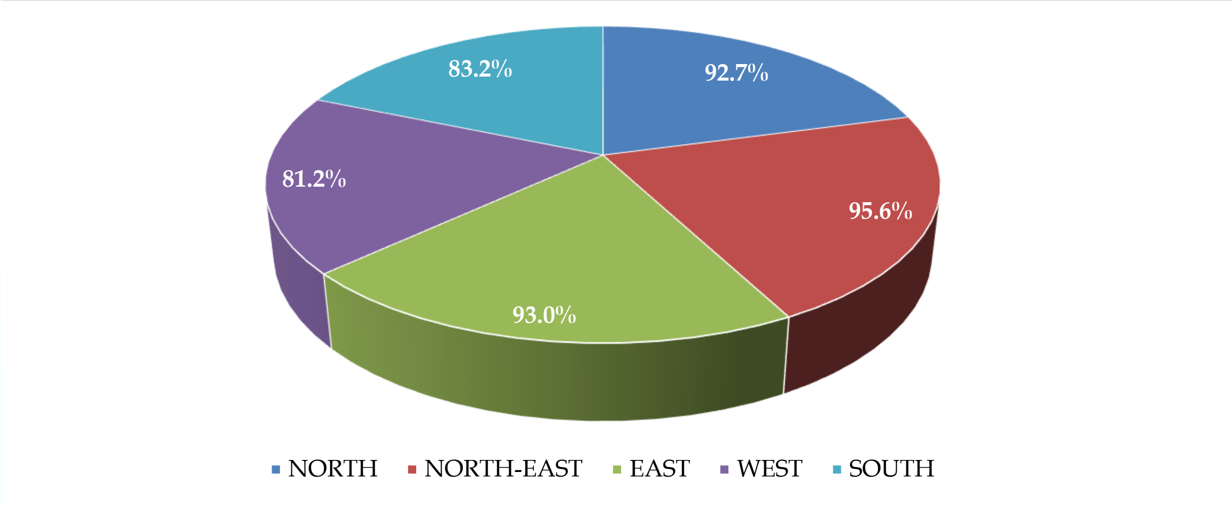
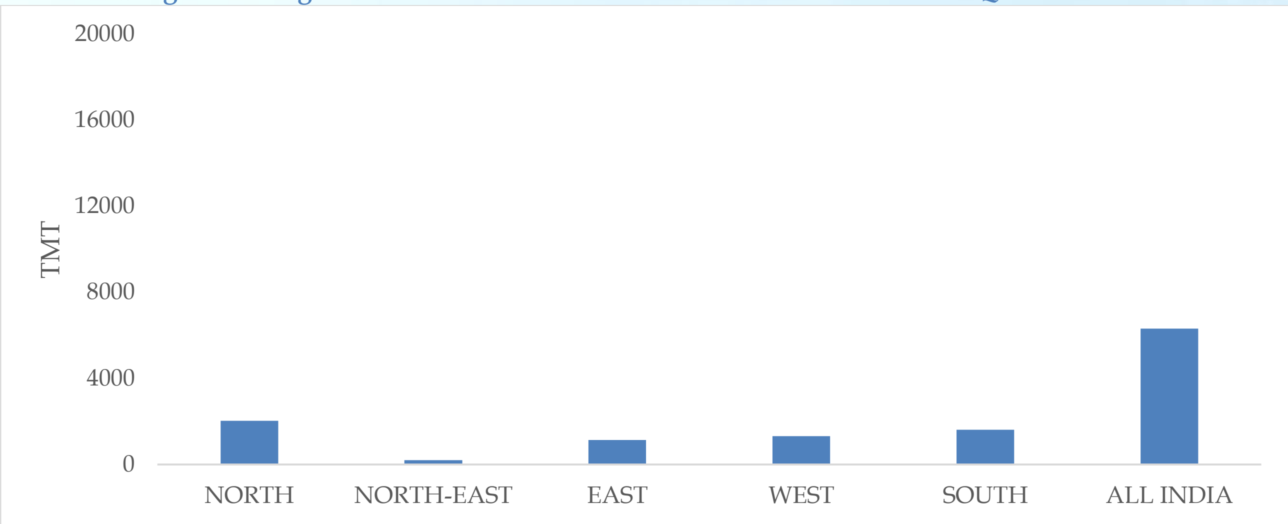


Figure 12: Region wise Packed Domestic LPG sales of PSU OMCs in Q1 FY 2024-25



- Packed domestic segment dominated LPG consumption on all India basis with a share of around 89.5%. The share of packed domestic sales varies from around 83.5% to 95.6% in various regions.

Table 4 : Total LPG Sales during Q1 FY 2024-25 (P)

Figures in Thousand metric tonne(TMT)

State/UTs	Packed domestic
Chandigarh	10.1
Delhi	166.5
Haryana	198.2
Himachal Pradesh	41.5
Jammu & Kashmir	55.2
Ladakh	2.2
Punjab	212.4
Rajasthan	352.6
Uttar Pradesh	924.0
Uttarakhand	74.7
Sub Total North	**2037.5**
Arunachal Pradesh	7.1
Assam	134.7
Manipur	11.1
Meghalaya	7.9
Mizoram	8.6
Nagaland	7.3
Sikkim	4.8
Tripura	15.3
Sub Total North-East	**196.7**
Andaman & Nicobar Islands	3.0
Bihar	395.6
Jharkhand	94.1
Odisha	153.8
West Bengal	491.1
Sub Total East	**1137.6**
Chhattisgarh	82.3
Dadra & Nagar Haveli and Daman & Diu	4.1
Goa	13.2
Gujarat	268.6
Madhya Pradesh	275.8
Maharashtra	673.4
Sub Total West	**1317.5**
Andhra Pradesh	288.0
Karnataka	401.8
Kerala	219.0
Lakshadweep	0.2
Puducherry	9.7
Tamil Nadu	472.4
Telangana	230.6
Sub Total South	**1621.7**
All India	**6310.9**

6. Auto LPG stations and Auto LPG sales

Figure 13: Regional distribution of Auto LPG stations and Auto LPG Sales % in Q1 FY2024-25

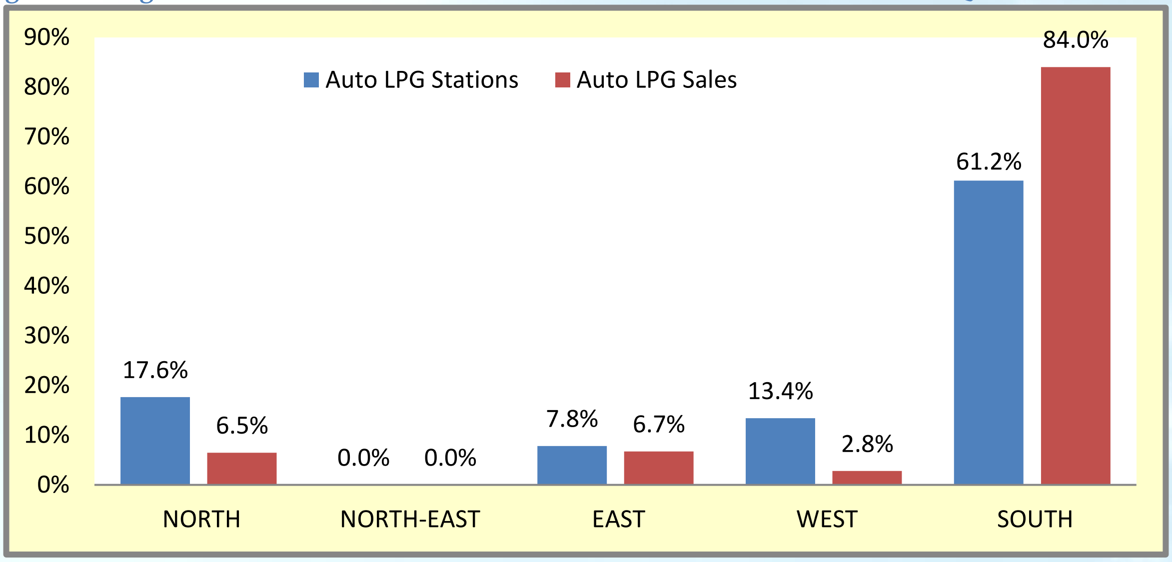
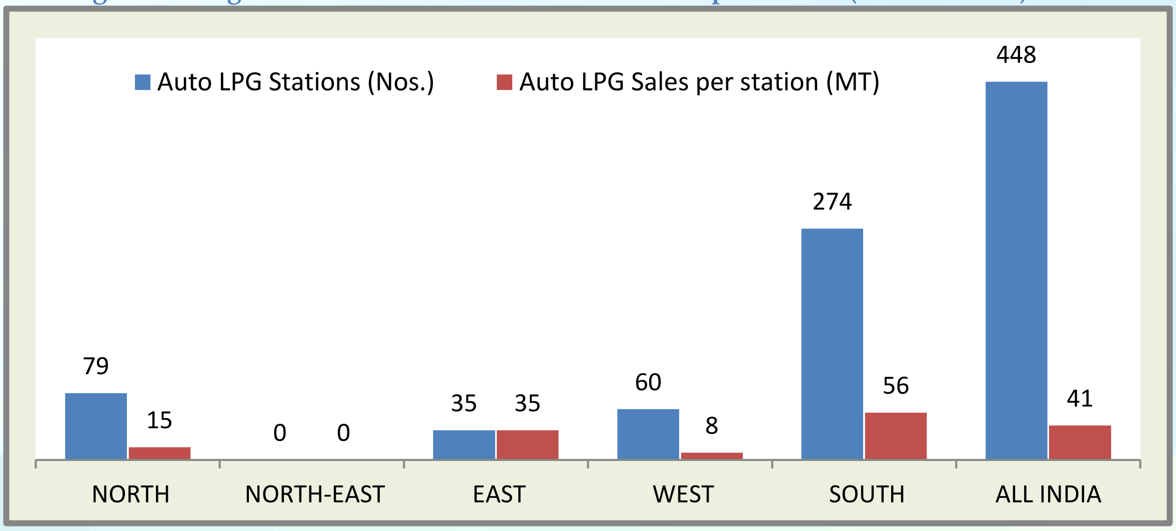


Figure 14: Region-wise Auto LPG Stations and Sales per station (as on 1.7.2024)



- Southern region has the highest number of Auto LPG stations (61.2%) followed by Northern (17.6%), Western (13.4%), Eastern region (7.8%) and North-East (0%).

- Southern region has the highest sales of Auto LPG (84.0%) followed by Eastern (6.7%), Northern region (6.5%) & Western (2.8%) region. There are no sales of Auto LPG in the North-East.

- Auto LPG sale per station in Q1 FY2024-25 is highest in the Southern region (56 MT), followed by Eastern region (35 MT), Northern (15 MT), Western (8 MT), and North-East (0).

Table 5: No of Auto LPG dispensing stations as on 1.7.2024 and Auto LPG Sales in Q1 FY2024-25 (P)

State/UTs	No. of ALDS	Auto LPG Sales (Figures in MT)
Chandigarh	4	350
Delhi	1	3
Haryana	2	4
Himachal Pradesh	0	0
Jammu & Kashmir	3	8
Ladakh	0	0
Punjab	9	80
Rajasthan	23	459
Uttar Pradesh	33	252
Uttarakhand	4	21
Sub Total North	**79**	**1178**
Arunachal Pradesh	0	0
Assam	0	0
Manipur	0	0
Meghalaya	0	0
Mizoram	0	0
Nagaland	0	0
Sikkim	0	0
Tripura	0	0
Sub Total North-East	**0**	**0**
Andaman & Nicobar Islands	0	0
Bihar	0	0
Jharkhand	0	0
Odisha	3	0
West Bengal	32	1226
Sub Total East	**35**	**1226**
Chhattisgarh	4	122
Dadra & Nagar Haveli and Daman & Diu	0	0
Goa	0	0
Gujarat	17	0
Madhya Pradesh	18	219
Maharashtra	21	163
Sub Total West	**60**	**504**
Andhra Pradesh	10	145
Karnataka	103	7376
Kerala	33	1072
Lakshadweep	0	0
Puducherry	1	30
Tamil Nadu	78	4730
Telangana	49	1957
Sub Total South	**274**	**15310**
All India	**448**	**18218**

Chapter-3

LPG Customers

7. Active domestic customers

Figure 15: Regional distribution of active domestic customers as on 1.7.2024

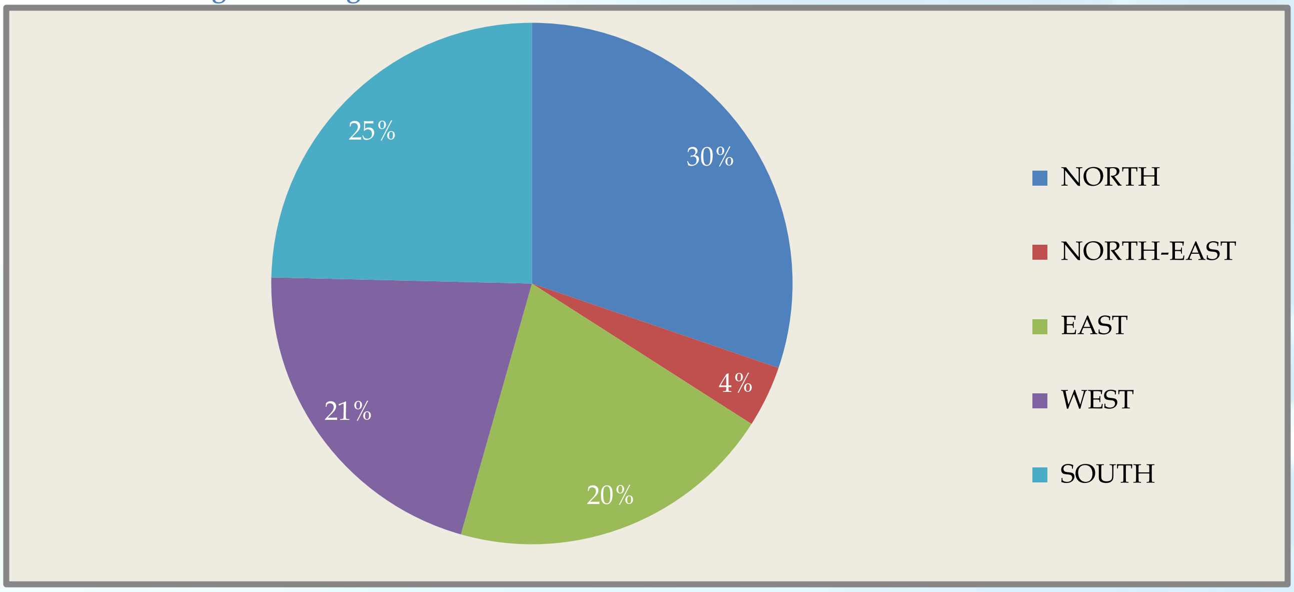
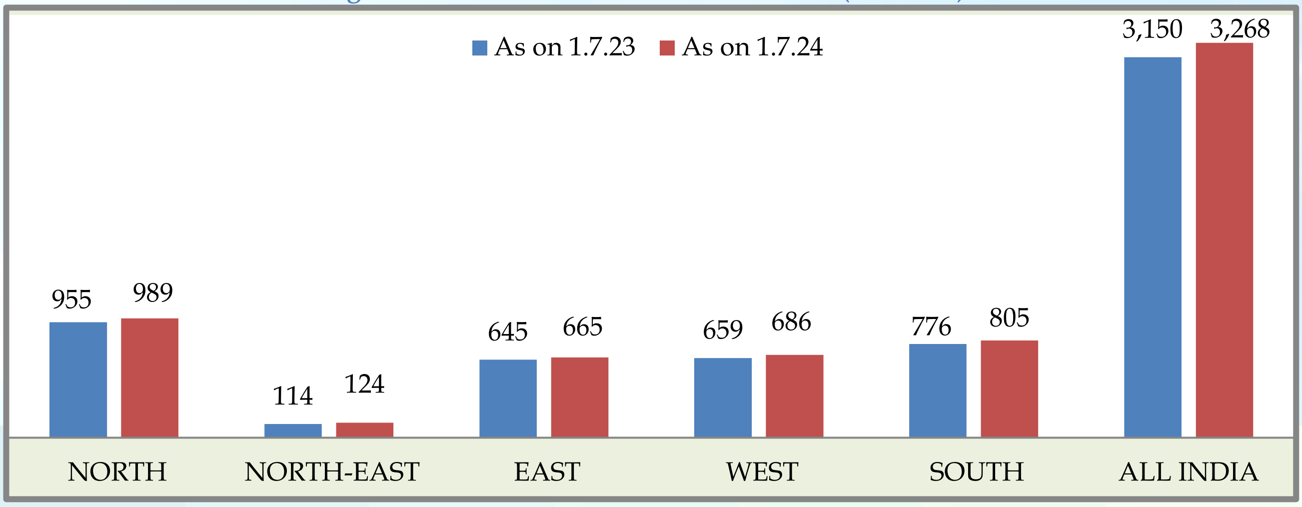


Figure 16: Active domestic LPG customers (In Lakhs)



- Northern region has the highest number of active domestic customers (30%) followed by Southern (25%), Western (21%), Eastern (20%) and North-eastern region (4%).

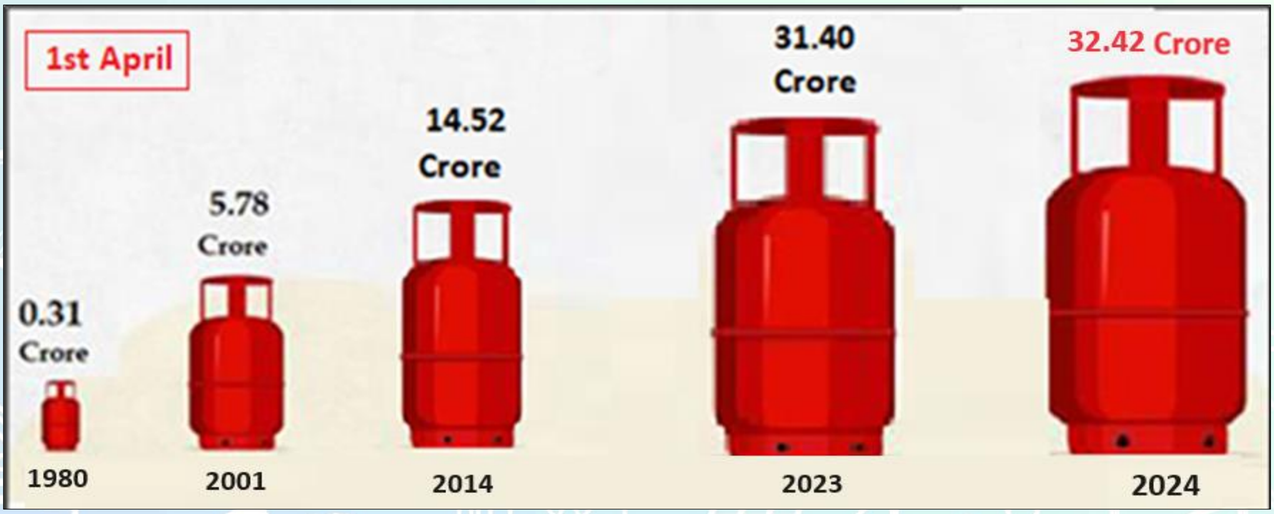


Table 6: Active domestic customer population as on 1.7.2024 (P)

Figure in Lakhs

State/UTs	Total
Chandigarh	3.0
Delhi	56.2
Haryana	81.3
Himachal Pradesh	22.1
Jammu & Kashmir	35.2
Ladakh	1.0
Punjab	95.6
Rajasthan	182.7
Uttar Pradesh	479.7
Uttarakhand	31.8
Sub Total North	**988.5**
Arunachal Pradesh	3.2
Assam	91.5
Manipur	6.9
Meghalaya	5.2
Mizoram	3.6
Nagaland	3.8
Sikkim	1.8
Tripura	8.3
Sub Total North-East	**124.4**
Andaman & Nicobar Islands	1.3
Bihar	227.6
Jharkhand	65.8
Odisha	100.1
West Bengal	270.0
Sub Total East	**664.8**
Chhattisgarh	62.8
Dadra & Nagar Haveli & Daman & Diu	1.7
Goa	5.7
Gujarat	127.1
Madhya Pradesh	174.3
Maharashtra	314.2
Sub Total West	**685.8**
Andhra Pradesh	156.3
Karnataka	186.6
Kerala	97.2
Lakshadweep	0.1
Puducherry	4.1
Tamil Nadu	235.1
Telangana	125.3
Sub Total South	**804.8**
All India	**3268.2**

8. New Enrolments

Figure 17: Region-wise percentage of new enrolments in Q1 FY 2024-25

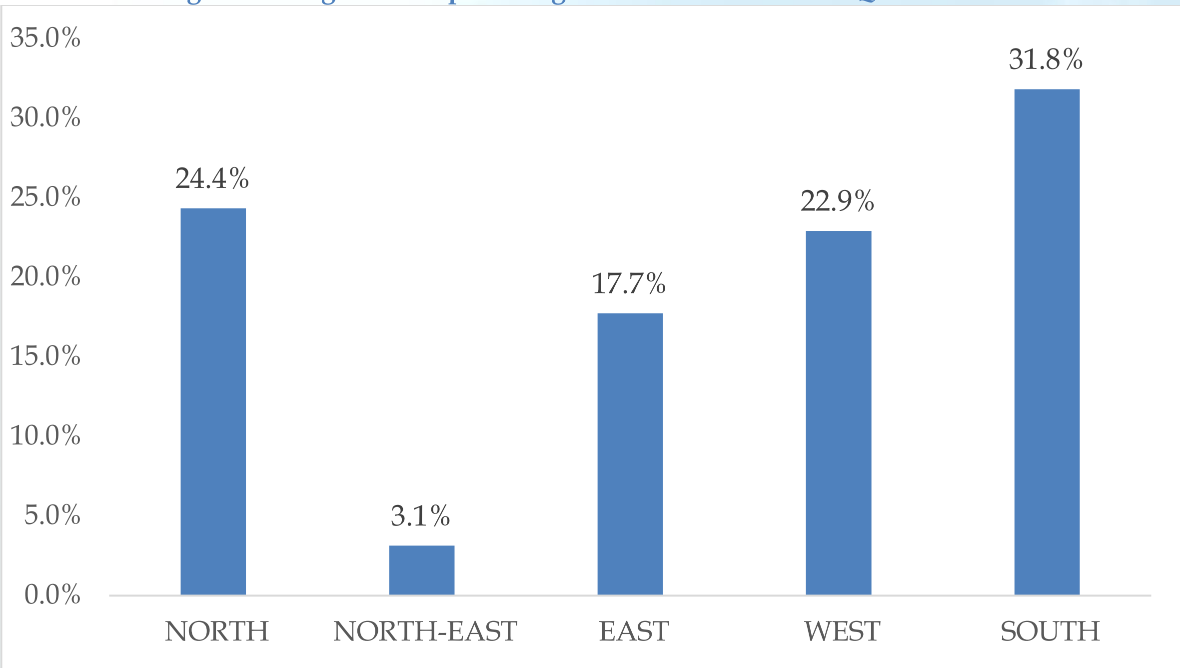
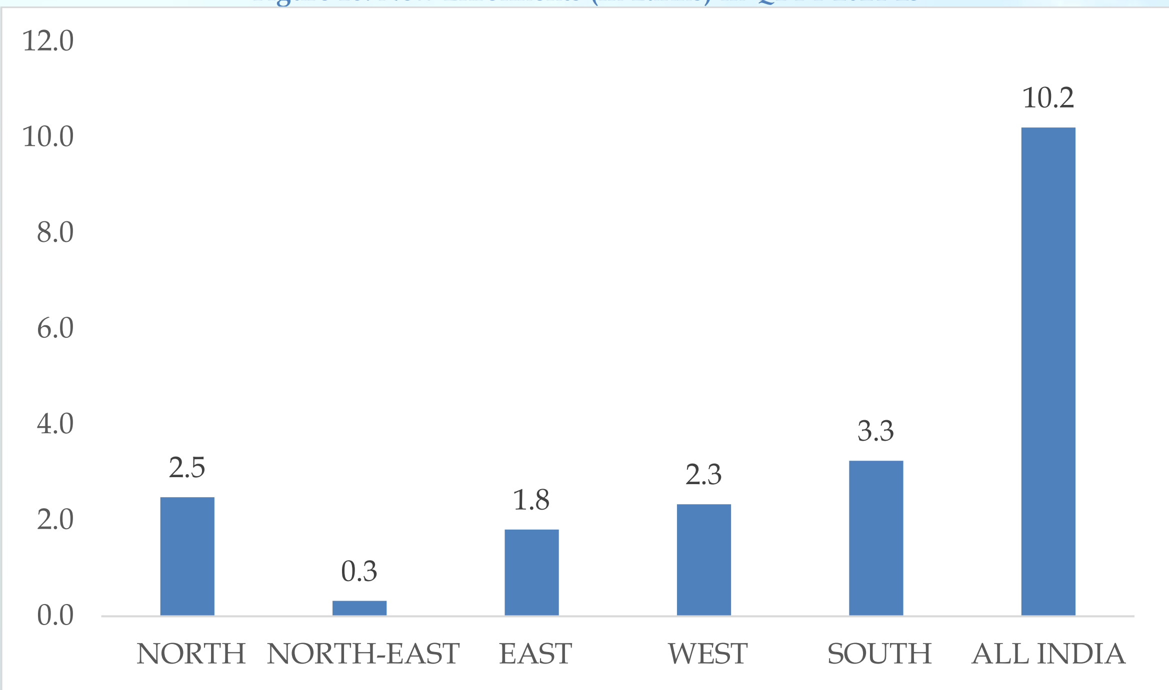


Figure 18: New Enrolments (in Lakhs) in Q1 FY 2024-25



- PSU OMCs enrolled 10.2 lakhs new customers in Q1 FY2024-25. The highest number of enrollments was reported in Southern region (31.8%), Northern region (24.4%), Western region (22.9%), Eastern region (17.7%) and North-Eastern region (3.1%).

Table 7 : New Enrolment (14.2 Kg/5 Kg) in Q1 FY 2024-25 (P)

State/UTs	Figures in Lakhs		
	14.2 KG	5 KG	TOTAL
Chandigarh	0.01	0.0000	0.01
Delhi	0.17	0.0009	0.17
Haryana	0.32	0.0015	0.32
Himachal Pradesh	0.08	0.0007	0.08
Jammu & Kashmir	0.06	0.0002	0.07
Ladakh	0.01	0.0001	0.01
Punjab	0.23	0.0008	0.23
Rajasthan	0.35	0.0014	0.35
Uttar Pradesh	1.08	0.0089	1.09
Uttarakhand	0.16	0.0011	0.16
Sub Total North	**2.47**	**0.0156**	**2.49**
Arunachal Pradesh	0.03	0.0006	0.031
Assam	0.18	0.0010	0.18
Manipur	0.02	0.0001	0.02
Meghalaya	0.02	0.0003	0.02
Mizoram	0.02	0.0022	0.02
Nagaland	0.01	0.0001	0.01
Sikkim	0.01	0.0002	0.02
Tripura	0.02	0.0003	0.02
Sub Total North-East	**0.32**	**0.0047**	**0.32**
Andaman & Nicobar Islands	0.01	0.0004	0.01
Bihar	0.97	0.0026	0.97
Jharkhand	0.13	0.0018	0.13
Odisha	0.19	0.0016	0.19
West Bengal	0.50	0.0099	0.50
Sub Total East	**1.80**	**0.0164**	**1.81**
Chhattisgarh	0.13	0.0010	0.13
Dadra & Nagar Haveli and Daman & Diu	0.01	0.0000	0.01
Goa	0.03	0.0000	0.03
Gujarat	0.31	0.0010	0.32
Madhya Pradesh	0.32	0.0025	0.32
Maharashtra	1.53	0.0024	1.53
Sub Total West	**2.34**	**0.0069**	**2.34**
Andhra Pradesh	0.45	0.0014	0.46
Karnataka	0.82	0.0037	0.82
Kerala	0.39	0.0010	0.39
Lakshadweep	0.00	0.0000	0.00
Puducherry	0.01	0.0002	0.01
Tamil Nadu	0.87	0.0102	0.88
Telangana	0.69	0.0011	0.69
Sub Total South	**3.23**	**0.0176**	**3.25**
All India	**10.15**	**0.0611**	**10.21**

9. DBC enrolments

Figure 19: Region-wise percentage of DBC enrolments in Q1 FY2024-25 (P)

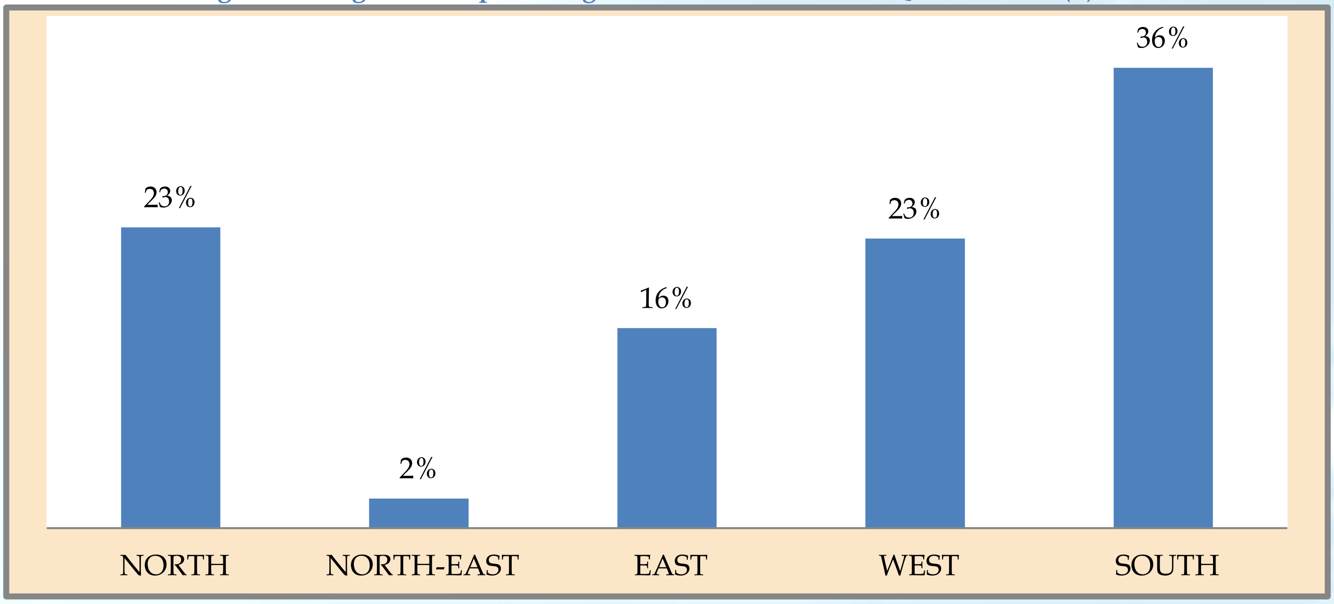
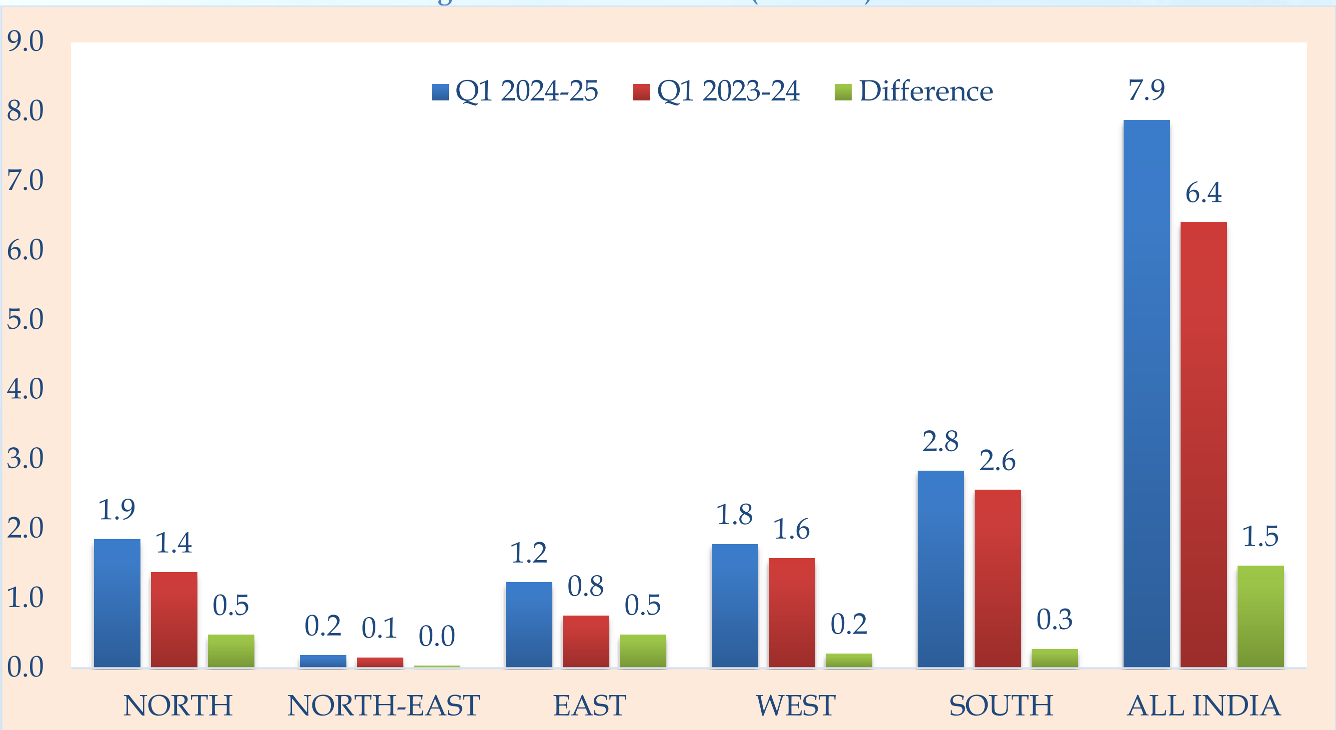


Figure 20: DBC enrolments (in Lakhs)



- PSU OMCs issued around 7.9 lakhs double bottle connections during Q1 FY2024-25. The maximum numbers of connections were released in Southern region (36%) and followed by Northern (25%), Western (23%), Eastern (16%) and North-East region (2%).

Table 8: DBC enrolment (14.2 Kg/5 Kg) in Q1 FY 2024-25(P)

Figures in Lakhs

State/UT	14.2 KG	5 KG	TOTAL
Chandigarh	0.01	0.0003	0.01
Delhi	0.05	0.0092	0.06
Haryana	0.14	0.0185	0.16
Himachal Pradesh	0.08	0.0078	0.09
Jammu & Kashmir	0.00	0.0000	0.00
Ladakh	0.08	0.0009	0.08
Punjab	0.13	0.0073	0.14
Rajasthan	0.41	0.0495	0.46
Uttar Pradesh	0.66	0.0612	0.72
Uttarakhand	0.13	0.0057	0.14
Sub Total North	**1.69**	**0.1604**	**1.85**
Arunachal Pradesh	0.03	0.0017	0.03
Assam	0.07	0.0111	0.08
Manipur	0.01	0.0003	0.01
Meghalaya	0.01	0.0012	0.02
Mizoram	0.00	0.0047	0.01
Nagaland	0.01	0.0005	0.01
Sikkim	0.01	0.0004	0.01
Tripura	0.02	0.0011	0.02
Sub Total North-East	**0.16**	**0.0209**	**0.18**
Andaman & Nicobar Islands	0.00	0.0009	0.00
Bihar	0.40	0.0316	0.43
Jharkhand	0.08	0.0111	0.09
Odisha	0.17	0.0064	0.18
West Bengal	0.46	0.0642	0.52
Sub Total East	**1.12**	**0.1142**	**1.23**
Chhattisgarh	0.10	0.0017	0.10
Dadra & Nagar Haveli and Daman & Diu	0.01	0.0000	0.01
Goa	0.02	0.0000	0.02
Gujarat	0.33	0.0029	0.33
Madhya Pradesh	0.26	0.0217	0.28
Maharashtra	1.02	0.0107	1.03
Sub Total West	**1.75**	**0.0370**	**1.78**
Andhra Pradesh	0.37	0.0058	0.38
Karnataka	0.89	0.0235	0.92
Kerala	0.34	0.0062	0.34
Lakshadweep	0.00	0.0000	0.00
Puducherry	0.01	0.0002	0.01
Tamil Nadu	0.65	0.0398	0.69
Telangana	0.49	0.0073	0.50
Sub Total South	**2.75**	**0.0829**	**2.83**
All India	**7.47**	**0.4153**	**7.88**

10. Non-domestic customer population

Figure 21: Regional distribution of non-domestic customers as on 1.7.2024

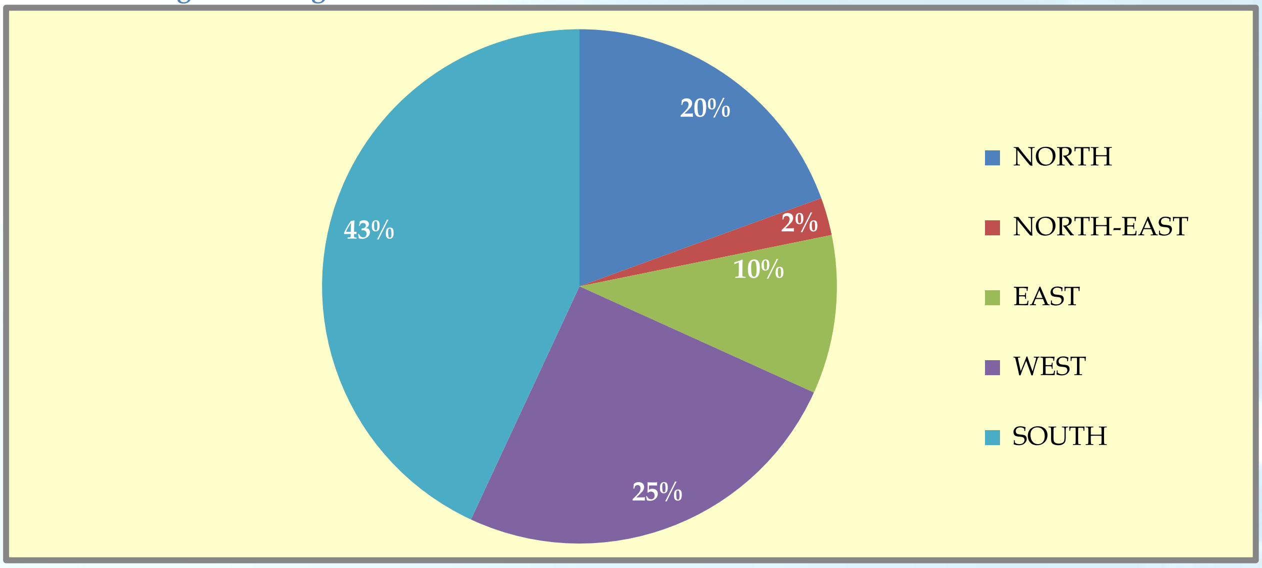
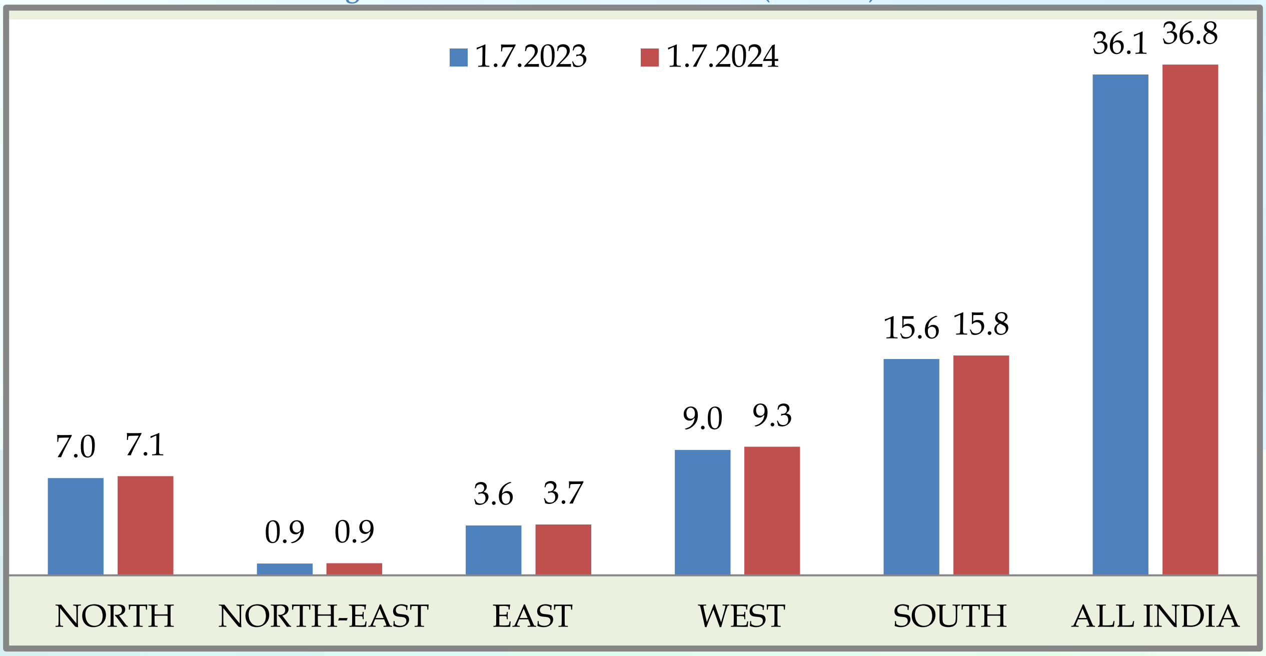


Figure 22: Non-Domestic customers (in lakhs)



- Southern region has the highest number of non-domestic customers (43%) followed by Western (25%), Northern (20%), Eastern (10%) and North-eastern region (2%).

- The total non-domestic customer population of PSU OMCs has increased by approximately 0.72 lakh in Q1 FY 2024-25 as compared to Q1 FY2023-24.

- The region-wise increase during Q1 FY 2024-25 was as follows: Southern (0.27 lakhs), Western (0.22 lakhs), Northern (0.14 lakhs), Eastern (0.07 lakhs) and North-Eastern (0.02 lakhs).

Table 9: Non-domestic customer population as on 1.7.2024 (P)

Figures in Lakhs

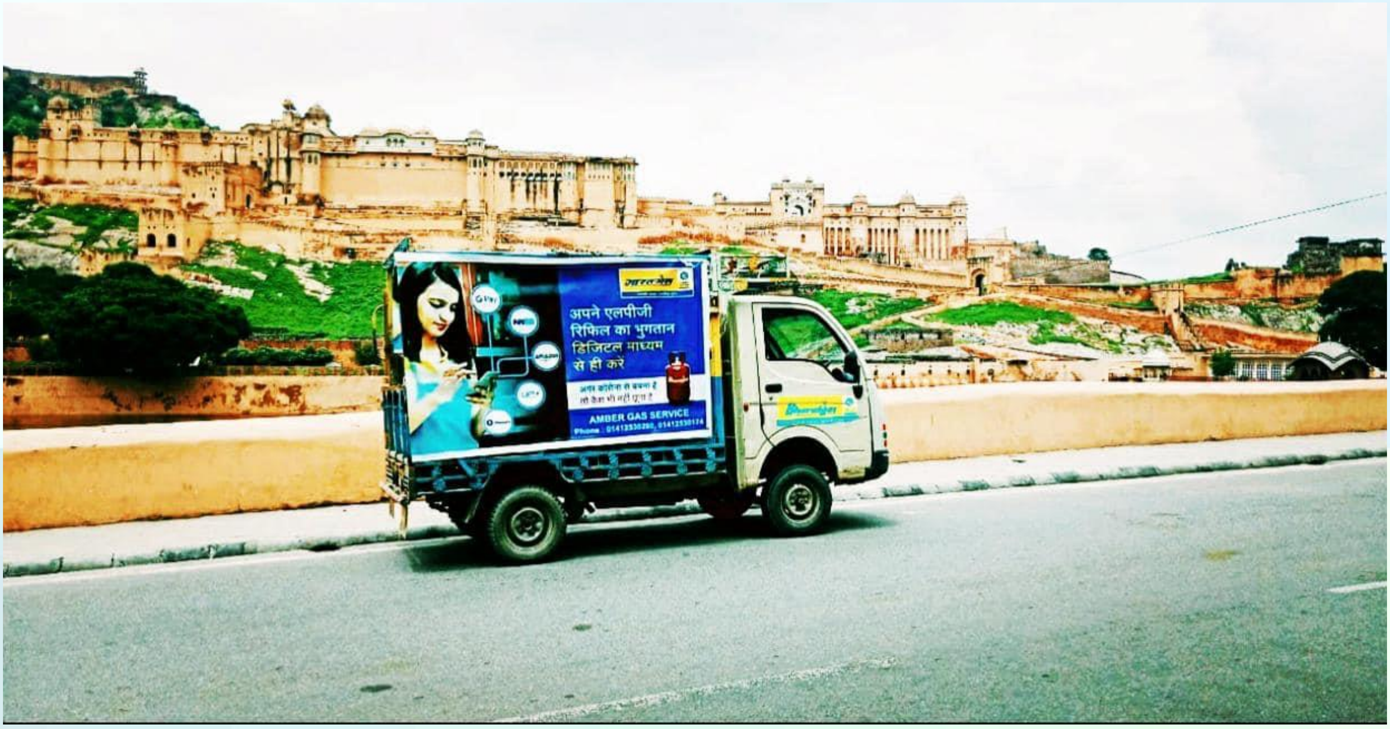
State/UT	Total
Chandigarh	0.06
Delhi	0.62
Haryana	0.67
Himachal Pradesh	0.68
Jammu & Kashmir	0.20
Ladakh	0.04
Punjab	0.87
Rajasthan	1.52
Uttar Pradesh	1.94
Uttarakhand	0.57
Sub Total North	**7.14**
Arunachal Pradesh	0.04
Assam	0.49
Manipur	0.04
Meghalaya	0.10
Mizoram	0.05
Nagaland	0.05
Sikkim	0.05
Tripura	0.05
Sub Total North-East	**0.87**
Andaman & Nicobar Islands	0.03
Bihar	1.16
Jharkhand	0.28
Odisha	0.54
West Bengal	1.66
Sub Total East	**3.67**
Chhattisgarh	0.35
Dadra & Nagar Haveli and Daman & Diu	0.08
Goa	0.24
Gujarat	2.38
Madhya Pradesh	1.27
Maharashtra	4.93
Sub Total West	**9.25**
Andhra Pradesh	1.43
Karnataka	3.61
Kerala	3.42
Lakshadweep	0.00
Puducherry	0.11
Tamil Nadu	6.08
Telangana	1.18
Sub Total South	**15.84**
All India	**36.77**

11. LPG Waiting list

PPAC has removed LPG waiting list item from this report as there is no waiting list in India due to following reasons:

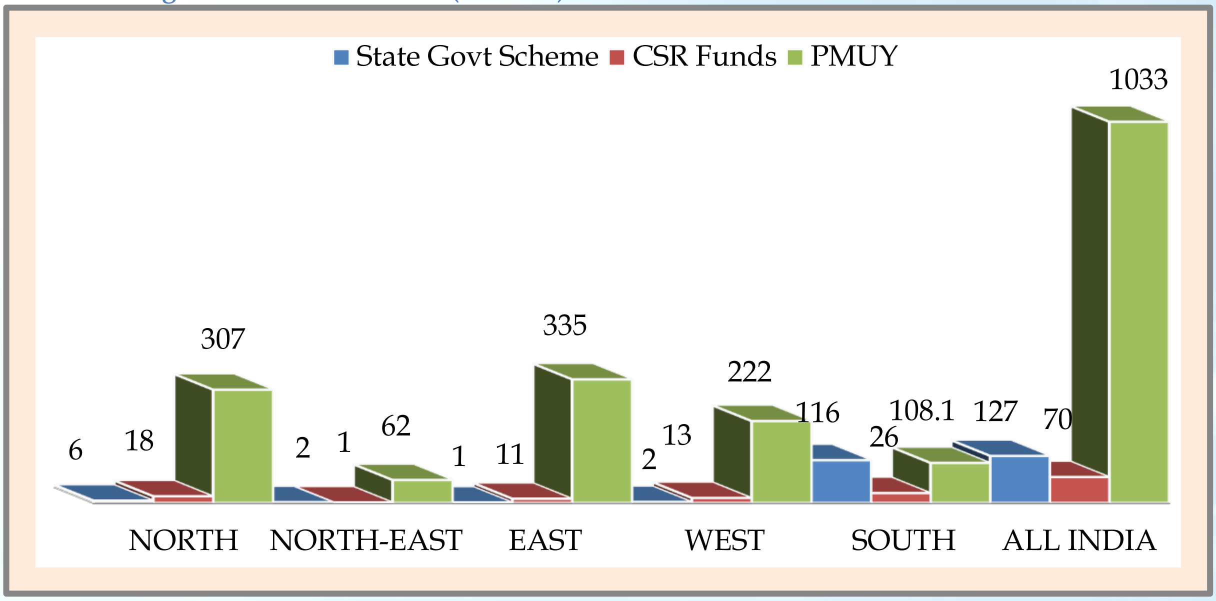
- On demand on PAN India basis, OMCs are providing LPG connections across the counter. Request for a new LPG connection is immediately registered in the system by the concerned OMC Distributor and connection is duly issued after system driven de-duplication checks.

- Customers also have the option of applying for a new LPG connection online with online payment as well. Therefore, now a customer can avail a new LPG connection without visiting the concerned LPG Distributorship.



12. Beneficiaries covered under various schemes

Figure 23: BPL customers (in lakhs) covered under various Schemes as on 1.7.2024



- The PMUY scheme has covered around 10.33 crore poor women beneficiaries since its launch in May 2016 which is more than the total number of beneficiaries covered under State Government schemes and CSR funds of OMCs till 1.7.2024.

- Southern region dominates in respect of coverage of beneficiaries under State sponsored schemes with around 1.16 crore customers covered mainly in the states of Andhra Pradesh, Tamil Nadu, & Telangana. Only 108.1 lakhs PMUY connections have been issued as on 1.7.2024 in Southern region, presumably because a large number of BPL families were already covered through State sponsored schemes.

Table 10: Beneficiaries covered under various schemes – cumulative position as on 1.7.2024(P)

Figure in Numbers

State/UTs	State Govt. sponsored scheme	CSR Funds of Oil Companies	Under PMUY Scheme
Chandigarh	0	1749	2027
Delhi	11541	182468	257774
Haryana	198545	184591	1114647
Himachal Pradesh	267207	18016	150817
Jammu & Kashmir	0	66575	1269989
Ladakh	0	403	11085
Punjab	99120	42693	1359364
Rajasthan	22205	384944	7380647
Uttar Pradesh	0	896463	18594511
Uttarakhand	21338	9655	530136
Sub Total North	**619956**	**1787557**	**30670997**
Arunachal Pradesh	0	741	53794
Assam	149128	110661	5097006
Manipur	0	341	224921
Meghalaya	0	494	316589
Mizoram	4618	1091	35989
Nagaland	0	0	122123
Sikkim	37351	325	19904
Tripura	0	2407	315418
Sub Total North-East	**191097**	**116060**	**6185744**
Andaman & Nicobar Islands	0	0	13824
Bihar	0	214830	11627899
Jharkhand	104207	127911	3895544
Odisha	0	611405	5549341
West Bengal	0	158962	12375656
Sub Total East	**104207**	**1113108**	**33462264**
Chhattisgarh	33043	332740	3788873
Dadra & Nagar Haveli and Daman & Diu	0	187	17861
Goa	12580	416	1957
Gujarat	25720	114001	4307900
Madhya Pradesh	14581	560769	8836653
Maharashtra	157277	323325	5217632
Sub Total West	**243201**	**1331438**	**22170876**
Andhra Pradesh	5854997	602640	969282
Karnataka	74527	654652	4147825
Kerala	0	27279	387869
Lakshadweep	0	0	361
Puducherry	85437	3576	19338
Tamil Nadu	2945957	568671	4100279
Telangana	2603143	793083	1185753
Sub Total South	**11564061**	**2649901**	**10810707**
All India	**12722522**	**6998064**	**103300588**

13.PMUY Connections

Figure 24: Region-wise percentage of PMUY connections as on 1.7.2024

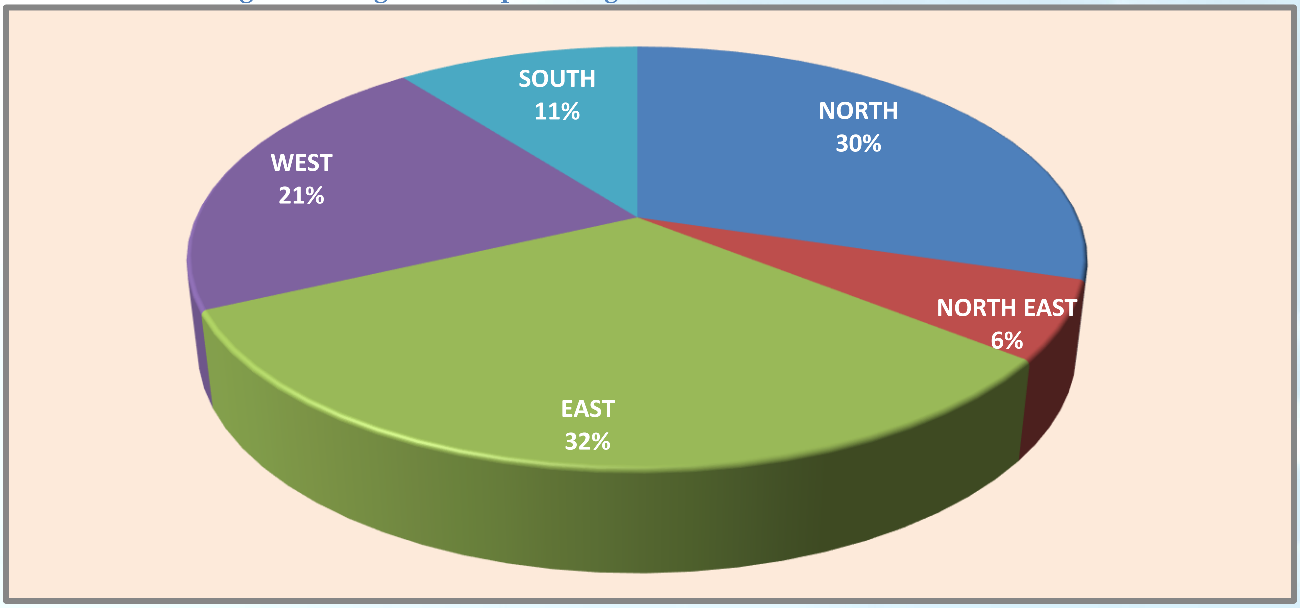
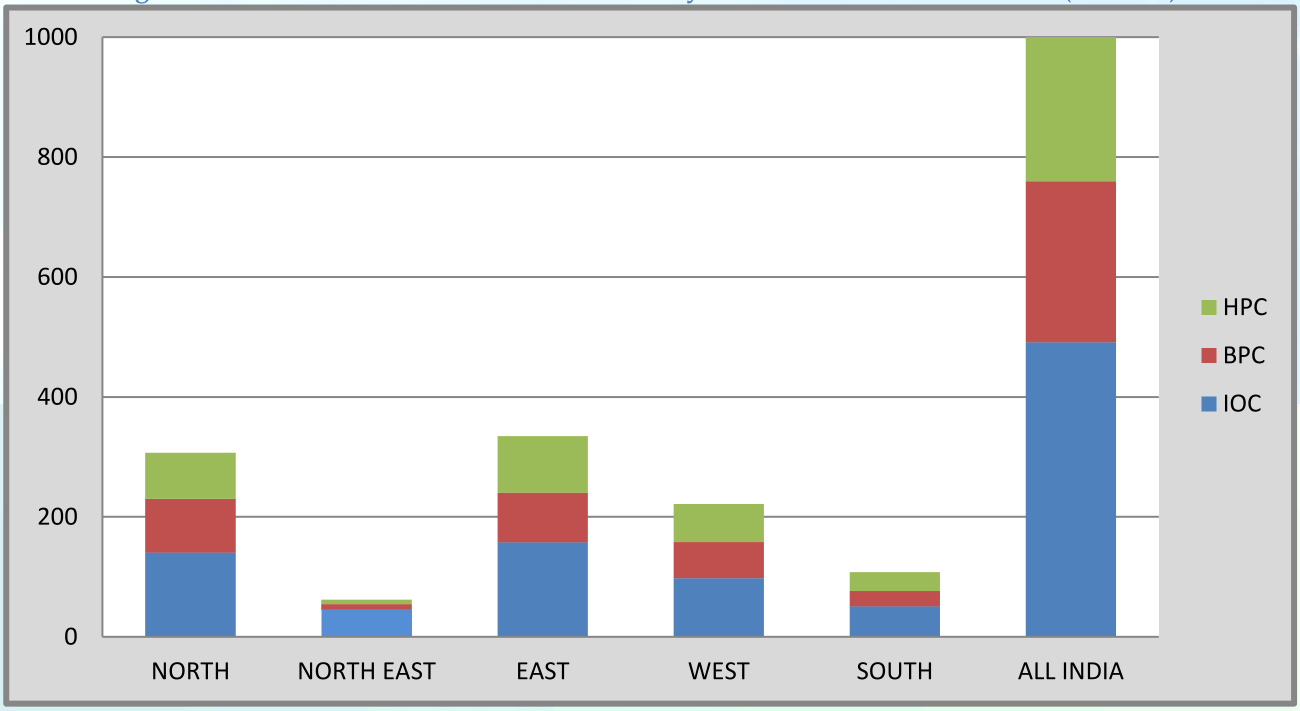


Figure 25: Beneficiaries covered under PMUY by various OMCs as on 1.7.2024 (in lakhs)



- As on 1.7.2024, the highest percentage of PMUY connections since the inception of the scheme on 1.5.2016 have been released in Eastern region (32%) followed by Northern region (30%) and Western region (21%), Southern region (11%) and North-East region (6%).

Table 11: State-wise PMUY connections as on 1.7.2024 (P)

Figure in Numbers

State / UT	Total
Chandigarh	2027
Delhi	257774
Haryana	1114647
Himachal Pradesh	150817
Jammu & Kashmir	1269989
Ladakh	11085
Punjab	1359364
Rajasthan	7380647
Uttar Pradesh	18594511
Uttarakhand	530136
Sub Total North	**30670997**
Arunachal Pradesh	53794
Assam	5097006
Manipur	224921
Meghalaya	316589
Mizoram	35989
Nagaland	122123
Sikkim	19904
Tripura	315418
Sub Total North-East	**6185744**
Andaman & Nicobar Islands	13824
Bihar	11627899
Jharkhand	3895544
Odisha	5549341
West Bengal	12375656
Sub Total East	**33462264**
Chhattisgarh	3788873
Dadra & Nagar Haveli and Daman & Diu	17861
Goa	1957
Gujarat	4307900
Madhya Pradesh	8836653
Maharashtra	5217632
Sub Total West	**22170876**
Andhra Pradesh	969282
Karnataka	4147825
Kerala	387869
Lakshadweep	361
Puducherry	19338
Tamil Nadu	4100279
Telangana	1185753
Sub Total South	**10810707**
All India	**103300588**

Chapter-4

Parallel Marketing System (PMS) of LPG

14.Parallel Marketing System (PMS) of LPG in India

- LPG marketing in India is carried out by public sector oil marketing companies (i.e. IOCL, BPCL and HPCL) as well as by private parties under the Parallel Marketing System (PMS). Under PMS, private parties can import LPG and market imported LPG in the country at market determined rates. No subsidy is available from Government for sales by PMS in the domestic segment.

- As per information received by PPAC from 106 parallel marketeers (PMs), they had sold 187.8 TMT during the month of June 2024 and 511.7 TMT during Apr'24-June'24 (Q1 FY 2024-25). This amounts to a market share of 6.6% for PMs in total LPG sales (PSU+PMs). Out of the total LPG sold in the country, 84.4% was in the domestic segment, commercial (9.3%), bulk segment (5.1%) and balance 1.2% in the transport segment. The sector wise market share of PMS in total LPG sale (PSU+PMS) of that sector was around 1.1 % in the Residential (domestic), commercial (14.1%), bulk segment (69.5%) and 80.1% in the transport segment during Q1 FY 2024-25.

Table 12:Sector-wise share of LPG sold by parallel marketeers (in TMT)

Segment-wise LPG Sales	Q1 FY 2024-25					Q1 FY 2023-24				
	Total	Packed Domestic	Packed Non-Domestic	Industrial (BULK)	Transport	Total	Packed Domestic	Packed Non-Domestic	Industrial (BULK)	Transport
	5= 1+2+3+4	1	2	3	4	v= i+ii+iii+iv	i	ii	iii	iv
PSU OMCs (a)	7051.0	6310.9	603.5	118.3	18.2	6734.2	5991.9	633.5	85.8	23.0
*PMS (b)	511.7	70.6	98.8	269.1	73.2	576.4	62.4	78.1	357.6	78.3
Total (c=a+b)	**7562.6**	**6381.5**	**702.3**	**387.5**	**91.4**	**7310.6**	**6054.3**	**711.5**	**443.4**	**101.4**
Segment-wise % share	100.0%	84.4%	9.3%	5.1%	1.2%	100.0%	82.8%	9.7%	6.1%	1.4%
PMS share %(b/c)	6.8%	1.1%	14.1%	69.5%	80.1%	7.9%	1.0%	11.0%	80.7%	77.3%
PSU share % (a/c)	93.2%	98.9%	85.9%	30.5%	19.9%	92.1%	99.0%	89.0%	19.3%	22.7%

*As reported by PMs (parallel marketeers)