

# INDUSTRY CONSUMPTION REPORT POL & NG

November 2025

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## CIRCULATION:

पेट्रोलियम और प्राकृतिक गैस मंत्रालय:	MoP&NG:
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संख्या : डी-12013/02/2025-I  
No. D-12013/02/2025-I

**Subject: Industry Consumption Review Report of PPAC: NOV 2025**

The monthly Petroleum Industry Consumption Review Report has been prepared by the Petroleum Planning and Analysis Cell (PPAC) for the month of NOV 2025. The report contains analysis of consumption of POL products and natural gas during the month. The same is enclosed for kind reference.

The Product wise sectoral break-ups are made more fundamental in this edition. This issue of ICR has inputs from Industry Performance Review coordinators & OMC head office officials namely, Shri Apurb Ghosh-IOCL, Shri Sandesh Mane HPCL & Shri Manoj Jha BPCL .

If you have any question on this report, please write to Mr. Sumit Sharma, Jt. Director-(Demand & Economics Studies), at [sumit.sharma001@ppac.gov.in](mailto:sumit.sharma001@ppac.gov.in).

धन्यवाद,

Thanking you,

विजय कंसल  
अपर निदेशक (मांग एवं आर्थिक अध्ययन)  
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Additional Director (Demand & Economic Studies)

## Highlights of the month: Nov 2025

- OIL and Total Energies signed a major technology agreement to boost deepwater and ultra-deepwater exploration across India's offshore basins.
- Nigeria's Dangote taps India's EIL to double refining capacity to 1.4 million bpd from the current capacity of 0.65 million bpd.
- World Energy outlook released by IEA described India as the largest driver of oil demand growth in coming years .
- IGL ties up with Saudi's MASAHA to expand natural gas network in key industrial hubs across the Kingdom.
- IndianOil commences first-ever export of LNG to Nepal. This is the first consignment of a five-year deal between IndianOil and Nepal's Yogya Holding agreed during the India Energy Week in February this year.
- JSW Energy has commissioned its first green hydrogen plant, India's largest so far, at the JSW Steel facility in Vijayanagar, Karnataka, in November 2025, producing 3,800 TPA.
- Renewable energy firm SAEL Industries is expected to invest ₹22,000 crore in Andhra Pradesh across sectors, including green energy, biomass, data centres, and port development.
- Bharat Petroleum announced that, citing the improved security situation in Mozambique, the consortium partners have decided to lift the force majeure on the LNG project in the Cabo Delgado Province of the East African nation.
- THINK Gas inks major long-term LNG pact with Shell Energy India. As per the deal, THINK Gas will receive natural gas supply from Shell Energy Hazira LNG terminal.
- India's Manufacturing PMI stood at 56.6 in November 2025, easing from 59.2 in October 2025, while remaining well above the neutral 50 mark.
- The Gross Goods and Services Tax (GST) collections for the month of November 25 came in at over Rs 1.70 lakh crore. This is a rise of 0.7%, according to official data .
- Year-on-year inflation rate based on All India Consumer Price Index (CPI) for the month of November, 2025 over November, 2024 is 0.71% (Provisional). There is increase of 46 basis points in headline inflation of November, 2025 in comparison to October, 2025.

## SUMMARY OF PRODUCT WISE POL

1. In November 2025, India's petroleum product consumption reached 21.27 million metric tonnes (MMT) with a robust growth of 3 % over 20.6 MMT in November 24.
2. Petrol (MS) consumption for November 2025 was 3.5 MMT (1.04 million barrels per day), reflecting an 2.6 % growth over 3.4 MMT (1.01 mbpd) in November 2024.
3. Ethanol blending in Petrol was 19.97% during Nov '25 and cumulative ethanol blending during for ESY ( Nov 24-Oct 25 ) remains at 19.24%.
4. The Domestic Sale of Passenger Vehicles in Nov 2025 with a volume of 3.94 lacs registered a robust growth of 19.71% over Nov 2024, as per FADA. Reduction in GST rates on vehicles has significantly boosted passenger vehicle (PV) demand during and post the festive season leading to record dealership footfalls .
5. HSD (Diesel) consumption during the month of November 2025 with a volume of 8.5 MMT (2.17 mbpd) registered a growth of 4.7 % over the volume of 8.1 MMT (2.07 mbpd) in the month of November 2024.
6. LPG consumption during the month of November 2025 with a volume of 2.8 MMT registering a growth of 7.4 % over the volume of 2.6 MMT in November 2024. LPG has been growing since last year riding on growth in PMUY segment along with good Bulk LPG growth.
7. ATF (Aviation Turbine Fuel) consumption for November 2025 was 0.78 MMT, recording a growth of 5.4 % from 0.74 MMT in November 2024.
8. Bitumen consumption during November 2025 with a volume of 0.91MMT registered a growth of 29 % over the volume of 0.70 MMT in the month of November 2024.
9. Kerosene (SKO) consumption with a volume of 43 TMT registered a growth of 19.2 % in November 2025 as compared to November 2024. SKO consumption during the month is largely constituted by PDS category with a 61% share.
10. Total Natural Gas Consumption (including internal consumption) for the month of November 2025 (P) was 5707 MMSCM which was 1% higher than the corresponding month of the previous year. The cumulative consumption of 46239 MMSCM for the current financial year till November 2025 was lower by 6.1% compared with the corresponding period of the previous year.
11. As on 31st Nov'2025, number of active LPG domestic connections are 33.10 cr and PMUY connections 10.35 cr.

This report analyses the trend of consumption of petroleum products in the country during the month of Nov 2025. Data on product-wise monthly consumption of petroleum products for Nov 2025 is uploaded on the PPAC website ([www.ppac.gov.in](http://www.ppac.gov.in)) and on the mobile app "PPAC". A small summary of Natural Gas consumption is also provided. Detailed NG production and consumption reports are available at [www.ppac.gov.in](http://www.ppac.gov.in).

The growth percentage in consumption of petroleum products, category-wise, for the month of Nov 2025 is given in Table-1

**Table-1: Consumption data of Petroleum Products ( M-O-M Comparison and Y-O-Y Comparison) (Quantity in TMT)**

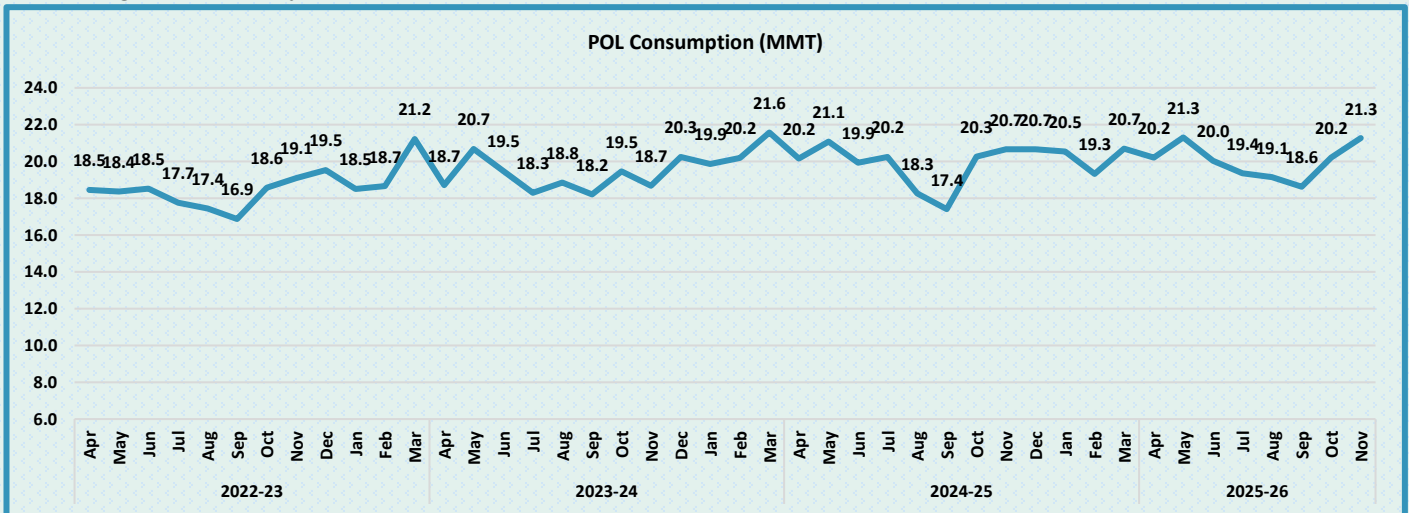
POL CONSUMPTION REPORT-November 2025								
Product	November (TMT)				April-November (TMT)			
	2024	2025	% share of November' 25	Growth (%)	2024-25	2025-26	Growth (%)	% share of Apr-Nov'25
<b>(A) Sensitive Products</b>								
LPG	2665	2862	13.5	↑ 7.4	20410	21952	↑ 7.6	13.7
SKO	36	43	0.2	↑ 19.2	273	299	↑ 9.2	0.2
<b>Sub Total</b>	<b>2701</b>	<b>2905</b>	<b>13.7</b>	<b>7.6</b>	<b>20684</b>	<b>22251</b>	<b>7.6</b>	<b>13.9</b>
<b>(B) Major Decontrolled Product</b>								
HSD	8166	8552	40.2	↑ 4.7	60194	61856	↑ 2.8	38.6
MS	3428	3517	16.5	↑ 2.6	26690	28372	↑ 6.3	17.7
Naphtha	1098	886	4.2	↓ -19.4	8981	7683	↓ -14.4	4.8
ATF	748	788	3.7	↑ 5.4	5882	5979	↑ 1.6	3.7
Bitumen	708	913	4.3	↑ 29.0	4976	5291	↑ 6.3	3.3
FO/LSHS	505	560	2.6	↑ 10.8	4432	4152	↓ -6.3	2.6
Lubes+Greases	351	391	1.8	↑ 11.3	3020	3138	↑ 3.9	2.0
LDO	80	88	0.4	↑ 9.7	540	672	↑ 24.6	0.4
<b>Sub Total</b>	<b>15085</b>	<b>15695</b>	<b>73.8</b>	<b>4.0</b>	<b>114714</b>	<b>117143</b>	<b>2.1</b>	<b>73.1</b>
<b>(C) Other Minor Decontrolled Products</b>								
Pet.Coke	2057	1780	8.4	↓ -13.5	14458	13870	↓ -4.1	8.7
Others*	813	892	4.2	↑ 9.7	8148	6904	↓ -15.3	4.3
<b>Sub Total</b>	<b>2870</b>	<b>2672</b>	<b>12.6</b>	<b>-6.9</b>	<b>22606</b>	<b>20774</b>	<b>-8.1</b>	<b>13.0</b>
<b>Total</b>	<b>20656</b>	<b>21272</b>	<b>100</b>	<b>3.0</b>	<b>158004</b>	<b>160168</b>	<b>1.4</b>	<b>100</b>
*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 Oct'25-Nov'25, which may undergo change on receipt of actual data), and								
(c) sales by SEZ units in Domestic Tariff Area (DTA) are provisional due to portal upgrade.								

**India's petroleum product consumption in November 2025 was 21.27 million tonnes with 3% growth over November 2024. This consumption was primarily driven by higher demand for HSD at 4.7%, (ATF) at 5.4%, LPG at 7.4%, and Bitumen at 29%.**

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. SEZ figures are provisional on account of portal upgradation.

Pan India based domestic POL monthly consumption trend since April-2022 is shown in Figure-A.

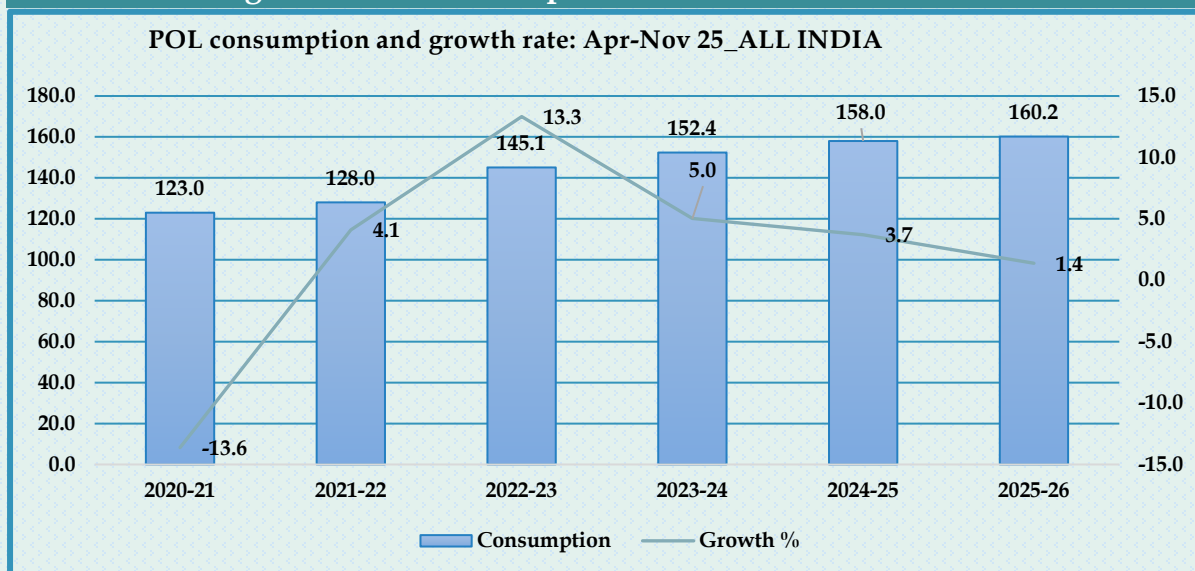
Figure-A: Monthly POL consumption (MMT) since April 2022



✓ The overall POL domestic consumption profile of the Nov 2025 & its pattern since 2020 with corresponding consecutive YoY growth rates are shown in the Figure-B; it is noted that

consumption is growing moderately compared to high of last year.

Figure-B: POL consumption & Growth rate YoY basis



Source: PPAC Y2 data & OMCs sales

Sales data in MMT

### Petrol/Motor Spirit (MS):

MS (Petrol) consumption during the month of Nov 2025 with a volume of 3.5 MMT recorded a growth of 2.6% on the volume of 3.4 MMT in Nov 2024. Cumulatively MS is growing at 6.3 % from Apr-Nov 25 period.

PSU's registered a growth rate of 2.0% as against 8.7% achieved by their private sector counterparts in Nov-25.

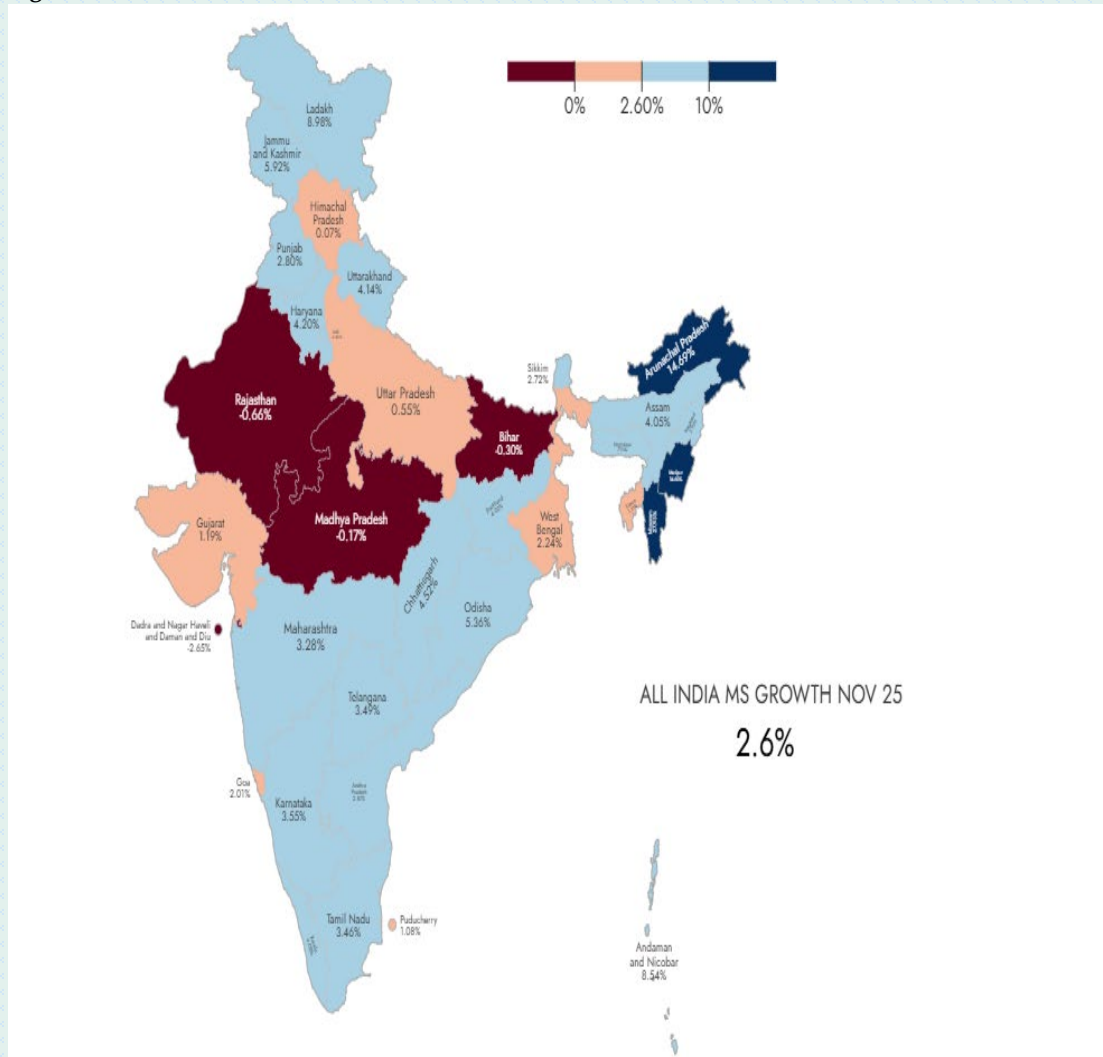
Major factors contributing to MS consumption during the month are as follows:

- The surge in demand for passenger vehicles (PV) and two-wheelers (2W) continuously to play

significantly role in rise of MS consumption, as both segments experienced notable sales growth in FY 2025-26.

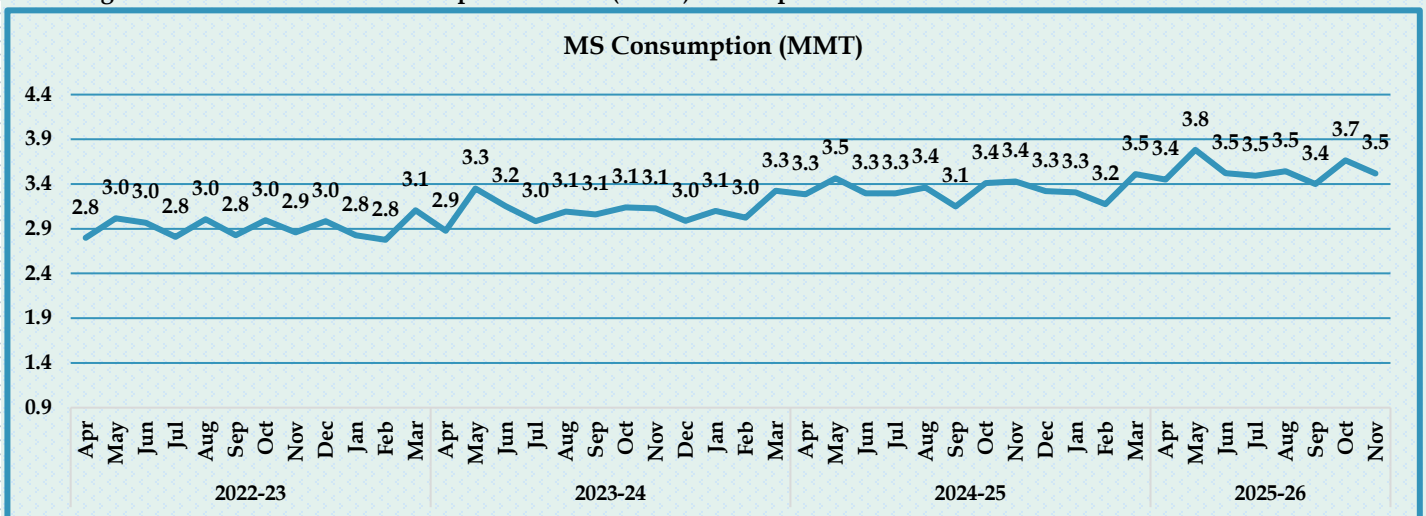
- Southern States witnessed growth in MS above the national average whereas big states like UP & Rajasthan registered below average national growth owing to tourism shift (festival holidays) to previous month this year.
- In November 25, MS growth acceleration slowed and the slowdown was primarily due to a high base effect from strong festive-season mobility in the previous year and the enforcement of GRAP norms in Delhi .

Figure-C: State Wise Growth in MS Month of Nov -2025



Pan India based domestic MS monthly consumption trend since April 2022 is shown in Figure-D

Figure-D: Month wise MS consumption volume (MMT) since April- 2022 to till Nov-2025



**Factors impacting consumption of MS:  
Passenger Vehicle Sales:**

The Sale of Passenger Vehicles in Nov 2025 at 3.94 lacs registered 19.71 % growth YoY in the month of Nov 25. Passenger Vehicle (PV) sales in November 2025 demonstrated strong year-on-

year (YoY) growth and significant inventory correction, despite a typical post-festive monthly moderation.

The details of PVs Sales are tabulated below, as shown in the following Table-2.

**Table-2: Passenger cars & Utility vehicles sales in the month of Nov 2025 (Primary sales data)**

Source: FADA

Vehicle Segment	Nov-25		Growth %age
	2024	2025	
Total PV	3,29,253	3,94,152	19.71%

**Two-Wheeler Sales:**

Two-wheeler sales in Nov 2025 with a volume of 25.46 %lacs registered 3.10% de -growth, YoY basis over volume of 26.27 lacs during Nov 2024.

**Three-Wheeler sales**

Three-wheeler domestic sales in Nov 2025 with a volume of 1.33 lac recorded a growth of 23.67 %, YoY basis over the volume of 1.08 lac in Nov 2024

**Table-3: Vehicle wise sales comparison (Primary sales data)**

CATEGORY	APR-NOV 25	APR-NOV 24	Growth %
2W	1,45,54,592	1,32,76,920	9.62%
3W	8,81,695	8,26,444	6.69%
CV	6,82,977	6,38,584	6.95%
CE	44,424	49,770	-10.74%
PV	29,10,945	26,92,614	8.11%
TRAC	6,48,622	5,50,558	17.81%
Total	1,97,23,255	1,80,34,890	9.36%

Source: FADA

**High Speed Diesel (HSD):**

HSD (Diesel) consumption during the month of Nov 2025 with a volume of 8.55 MMT, registered a growth of 4.7% on the volume of 8.16 MMT in the month of Nov 2024.

High-Speed Diesel (HSD) consumption recorded a strong year-on-year growth of 4.7% in November 2025, driven by robust economic activity.

PSU's registered a 3.8% growth and private sector witnessed 12.0% growth in the month of Nov-25.

- The growth during November 25 was primarily driven by higher demand from agricultural activities associated with kharif sowing.

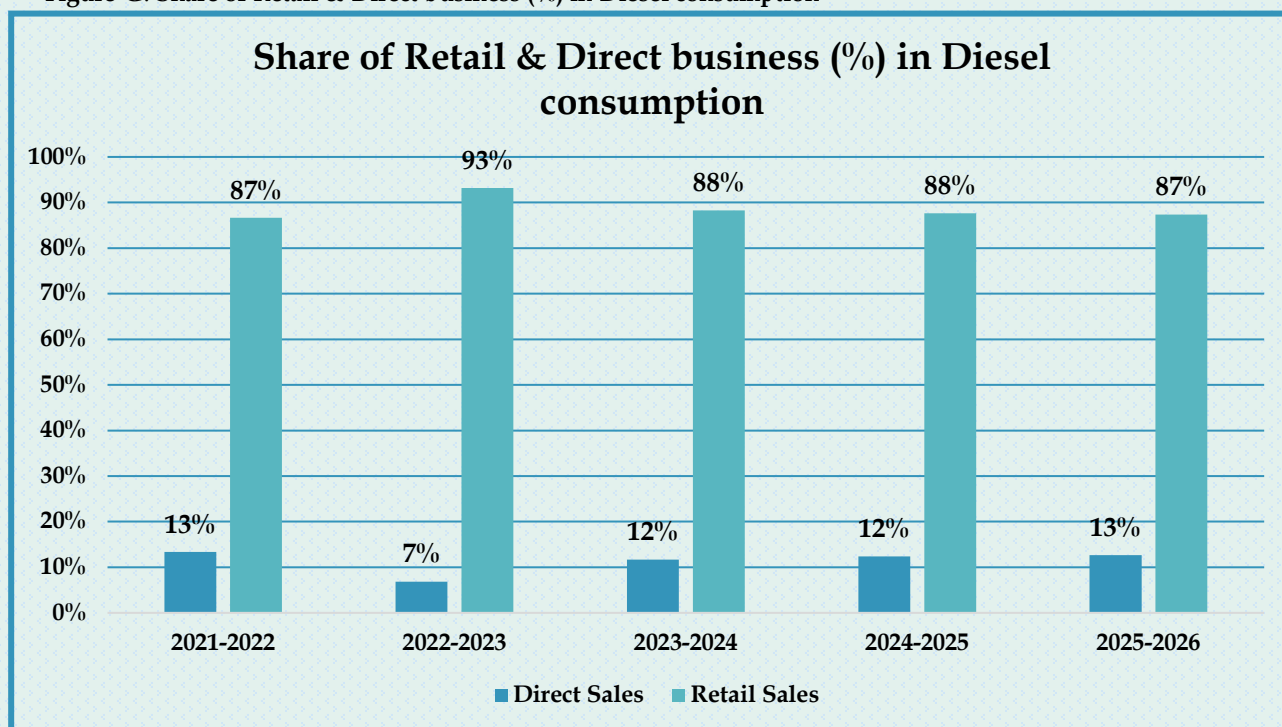
**Major factors contributing to HSD consumption during the month are as follows:**

- HSD growth was driven by growth in Direct sales which achieved a growth of 10.0 % in Apr-Nov 25. Retail segment grew at 1.8 % in the same period. HSD consumption in goods movement with major sectors like Manufacturing showing healthy growth during Apr -Nov 25 period

- Big HSD Consumption States like Gujarat, Maharastra found to be growing above National average of 4.7 % whereas UP witness mild growth of only 0.6 % in Nov 25 . Improvement in law & order situation in North-east also contributed in increase in freight movement .



Figure-G: Share of Retail & Direct business (%) in Diesel consumption



### Factors impacting consumption of HSD:

#### Weather

- India experienced varied weather conditions in November 2025, with regional deficiencies in rainfall and cooler temperatures in key areas, as reported by the India Meteorological Department (IMD).
- Delhi recorded its coldest November in five years, with a mean minimum temperature of 11.4°C (5th lowest since 1951) and mean maximum of 27.6°C (0.8°C below normal). Himachal Pradesh saw large deficient precipitation (-95%) at 1.0 mm against a normal of 19.7 mm across all districts.
- Southern states had mixed outcomes: Andhra Pradesh showed excess in post-monsoon cumulative data (+21% for Oct-Nov), while Tamil Nadu and Kerala experienced isolated heavy spells offsetting deficits; Northeast states like Arunachal Pradesh and Assam had no rain (-100% for late November) but earlier seasonal excess. National post-monsoon (Oct-Nov) trends indicated +23% to +35% above normal cumulatively through early December .
- Central India, encompassing Madhya Pradesh, Chhattisgarh, and parts of Maharashtra, experienced predominantly dry conditions with cold wave episodes during November 2025. Minimum temperatures fell significantly, with cold to severe cold wave conditions prevailing over western Madhya Pradesh (November 13-16), isolated parts of eastern Madhya Pradesh and Chhattisgarh (up to November 16), and Madhya Maharashtra/Vidarbha; Rajgarh (MP) recorded 7.4°C as a low.

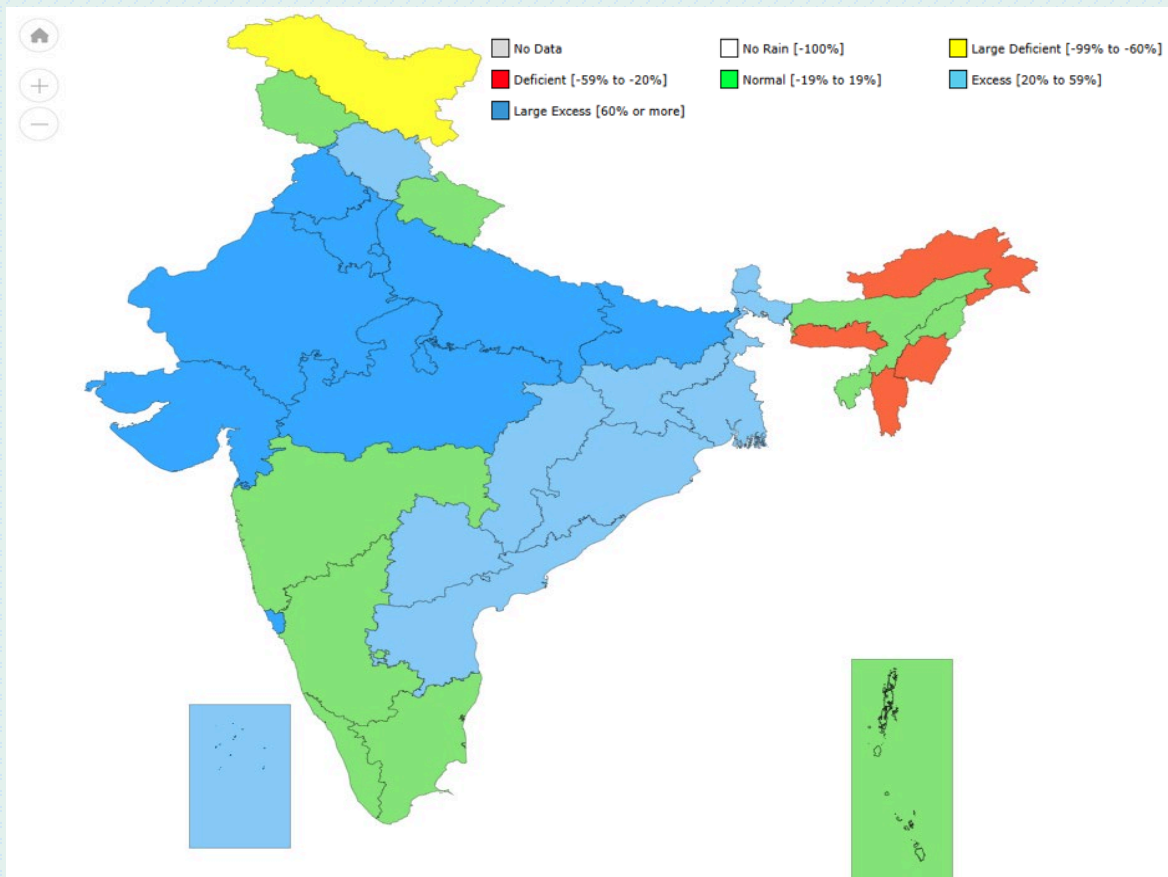


Overall Summary: India recorded largely dry conditions in November 2025, with normal to deficient rainfall across most regions amid retreating monsoon influences and La Niña conditions as per IMD.



Figure- H: State wise Rainfall Map for Nov 25. (Source : Indian Metreological Department)

Period 01.10.2025-07.12.2025



**Table-4 Details of the Total E-Way Generated in CY vis-a-vis LY :**

(No of Eway Bills Generated in Lakhs)

Month	Nov-25	Nov-24	Variance	Apr-Nov 25	Apr-Nov 24	Growth
<b>Intra State</b>	864.91	662.89	30%	6,643.32	5,403.02	23.0%
<b>Inter State</b>	434.05	355.14	22%	3,468.56	2,980.69	16.4%
<b>Total</b>	<b>1,298.96</b>	<b>1,018.03</b>	<b>28%</b>	<b>10,111.88</b>	<b>8,383.72</b>	<b>20.6%</b>

Source: GSTN Portal

**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. The number of E-way bills reflect quantum of transport activities directly influencing Diesel sales.

**Commercial Vehicle**

Based on data from FADA Research, Indian domestic sales of commercial vehicles registered a growth of 19.9% as compared to Nov 2024 as shown in Table-5

**Tractor Sale:**

Tractor domestic sales in Nov 2025 with a volume of 126,033 registered a robust growth of 56.5% over the volume of 80,507 in Nov 2024, driven by strong rural demand, healthy monsoon, increased mechanisation, and positive farmer sentiment.

**Table-5: Domestic commercial vehicles & tractors sales with YoY comparison (Secondary sales data)**

Commercial vehicles & tractors		Nov'25		
		2024	2025	Growth %age
CV	LCV	49,743	58,968	18.5%
	MCV	4,978	7,234	45.3%
	HCV	24,367	28,659	17.6%
	Others	64	74	15.6%
<b>Total CVs</b>		<b>79,152</b>	<b>94,935</b>	<b>19.9%</b>
<b>Tractors</b>		<b>80,507</b>	<b>126,033</b>	<b>56.5%</b>

Source: FADA research

**Port Traffic:**

The Major Ports achieved cargo throughput of 513.98 MMT during Apr-Nov'2025 which is 7.61% higher over same Period last year.

**Table-6: Cargo handled at major ports in April-Nov'2025 (Qty in TMT) Source: ipa.nic.in**

Ports	Apr-Nov'25	Apr-Nov'24	Growth (%)
Kolkata & Haldia	44607	38813	14.93
Paradip	101754	96679	5.25
Visakhapatnam	58244	53967	7.93
Kamarajar (Ennore)	31959	31136	2.64
Chennai	38434	35177	9.26
V.O. Chidambaranar	28315	27799	1.86
Cochin	25320	24434	3.63
New Mangalore	31347	28578	9.69
Mormugao	13099	10944	19.69
Mumbai	49430	46287	6.79
JNPA	66471	60050	10.69
Deendayal	102401	95697	7.01
<b>Total:</b>	<b>591381</b>	<b>549561</b>	<b>7.61</b>

## POWER SITUATION:

India's peak demand for power degrew marginally to 242.49 gigawatt (GW) in Apr-Nov'25 against 242.77 GW registered in the same period of last

year. The peak demand is at similar level to its earlier peak of 242.49 GW registered in Apr-Nov'25 as per, data sourced from the Central Electricity Authority showed. Rainfall contributed to lower electricity demand in the month.

**Table-7: Power availability vs requirement for current & previous period (upto April-Nov 2025)**

Year	Energy				Peak			
	Requirement	Availability	Surplus(+)/Deficits(-)		Peak Demand	Peak Met	Surplus(+)/ Deficits(-)	
	(MU)	(MU)	(MU)	(%)	(MW)	(MW)	(MW)	(%)
2021-22	920,587	916,529	-4,058	-0.4%	203,014	200,539	-2,475	-1.2%
2022-23	1,017,793	1,012,088	-5,705	-0.6%	215,888	207,231	-8,657	-4.0%
2023-24	1,101,654	1,098,652	-3,002	-0.3%	243,271	239,931	-3,340	-1.4%
2024-25	1,150,795	1,149,512	-1,283	-0.1%	249,856	249,854	-2	0.0%
2025-26	1,148,777	1,148,458	-319	0.0%	242,773	242,493	-280	-0.1%

## SECTORAL CONSUMPTION OF HSD:

During 'Apr-Nov-25, HSD total consumption with a volume of 61.86 MMT registered 2.8% growth Year-on-Year basis over the volume of 60.19 MMT in 'Apr-Nov-24.

87% of HSD consumption during 'Apr-Nov-25', was constituted by retail sales. Balance 13% falls under direct sales category as shown in I(I/II) figure. The bifurcation was 87:13 in 'Apr-Nov-24' also after direct sales volume recovering back.

Growth of 2.8% during Apr-Nov'25 was driven by increased economic activity & freight movement, evident by a 20.6% jump in Total E-way bill statistics.

In direct sales category, the sectoral consumption break up is shown in I(II) figure. i.e., for Apr-Nov-25 'Road Transport' was 20%, the highest share followed by Mining 13%, Manufacturing at 12%, Shipping 6%, Agriculture 4% and Power Generation 2%. Railways share dropped from 12% to 9%. Retail sales continue to cater to mostly the road transport.

Also share of Road transport reduced from 21% to 20% in the direct sales segment.

Details comparisons & YoY analysis are pictorially presented in the following figures.

**Figure-I(I): Sector-wise HSD consumption in Apr-Nov'25 and its comparison with Apr-Nov'24**

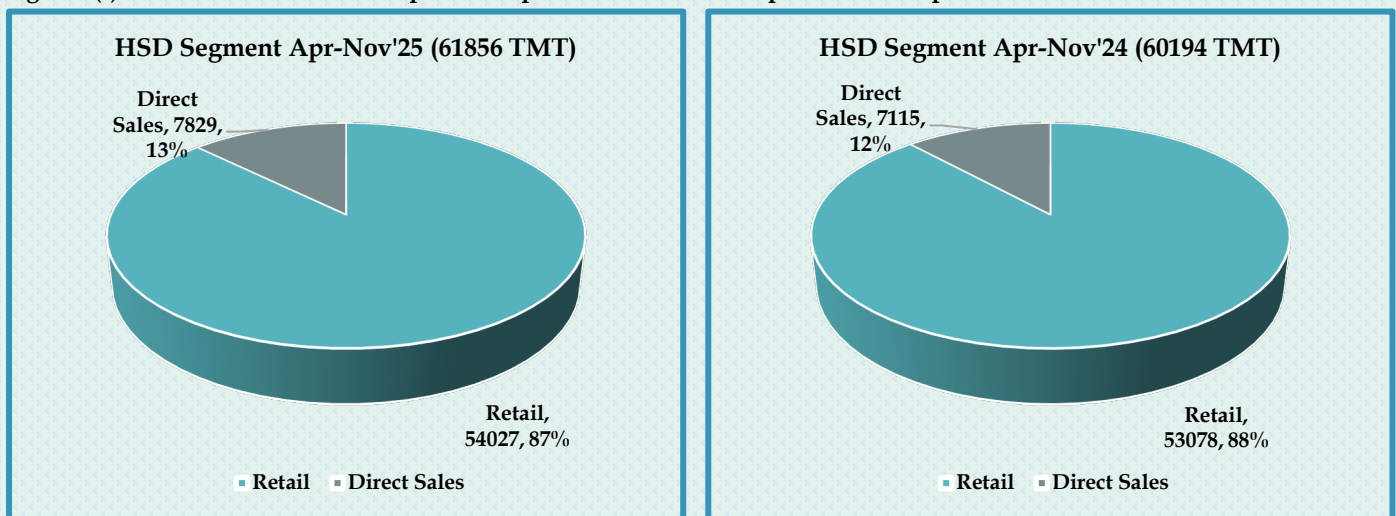


Figure-I(II): Sectoral HSD consumption Breakup in Apr-Nov'25 and its comparison with Apr-Nov'24



Share of Manufacturing is stable at 12% owing to weaker demand from the Cement & Metal industry in the Direct Sales segment. Share of Mining sector decreased to 13% with sales from the Retail segment also. Misc includes Cement Industry, Iron & Steel, Civil Engg, Chemicals & Allied, mechanical, Aluminium, Elec/Electronics, Fertilizers, Textiles, Ceramic & glass & other Misc Consumer/Industrials goods.

**Kerosene:**

Kerosene (SKO) consumption with a volume of 0.04 MMT registered a growth of 19.2% in Nov 2025 as compared to Nov 2024. Growth in SKO is mainly attributed to demand from the fisheries sector from the coastal states.

There are twelve states/UTs who have voluntarily surrendered the PDS kerosene quota as on date namely, except the UT of J&K, Ladakh and

Lakshadweep, all UTs and the states of Andhra Pradesh, Delhi, Haryana, Punjab, Uttar Pradesh, Rajasthan, Gujrat and Goa. UTs of J&K, Ladakh and Lakshadweep alongwith States of Telangana & Ultrakhand have nil allocation this financial year.

The market share of subsidized-PDS and other SKO was 56% & 44% respectively for the month Nov 2025 as shown in the following figure-J.

Figure-J: Month-wise PDS & other-SKO consumption in share (%) since April 2022 to till date

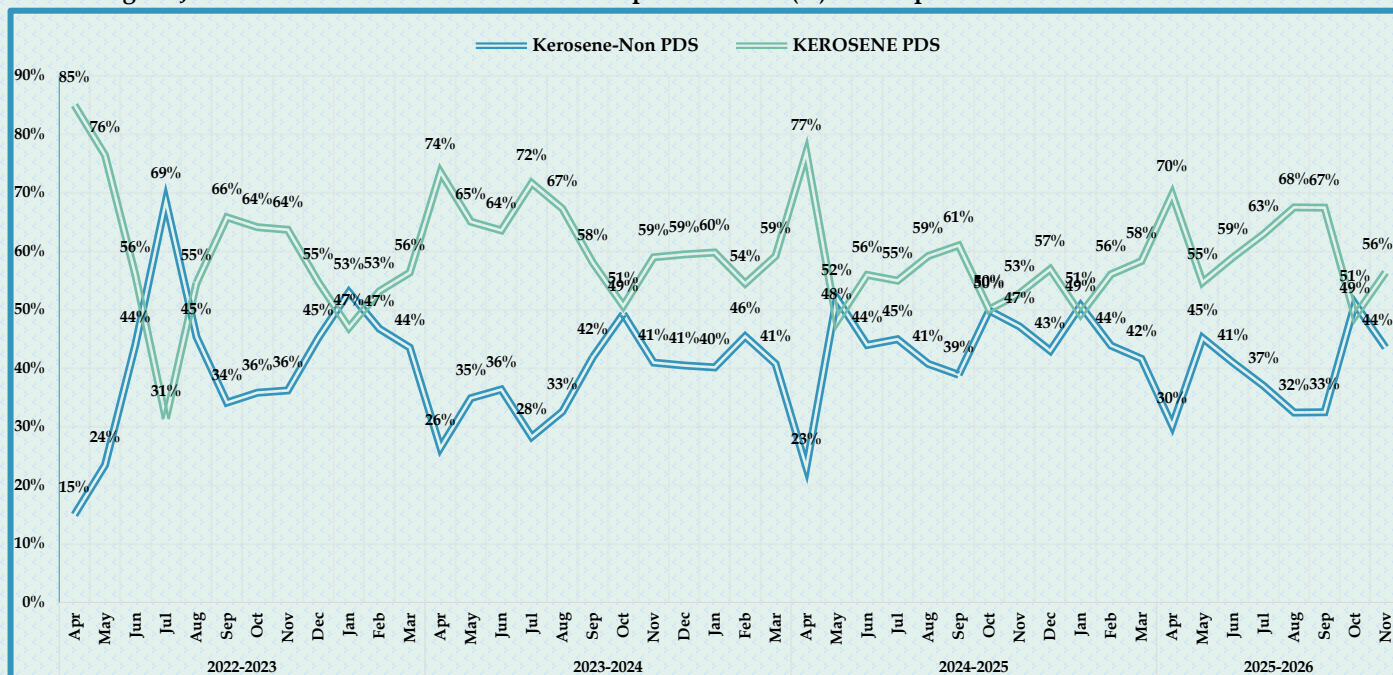
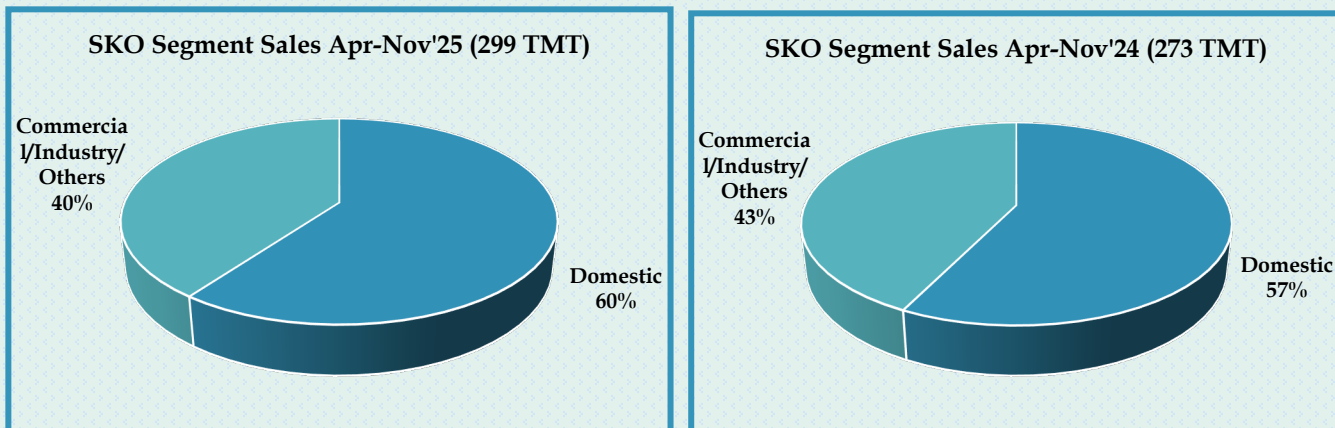


Figure-K: \*Other SKO: non-subsidized PDS SKO +non-PDS kerosene



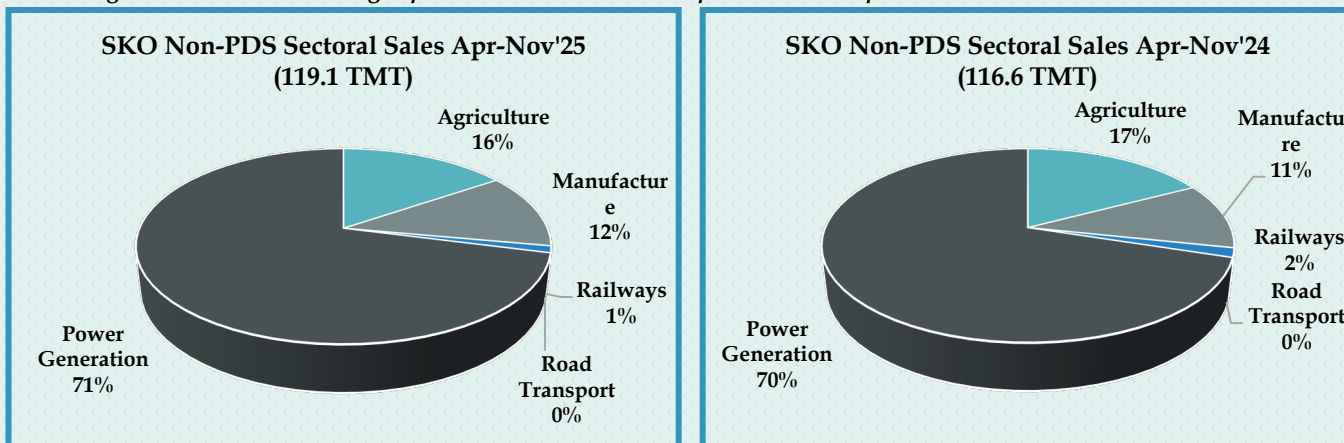
**Sectoral consumption of SKO:**

Out of total SKO sales during 'Apr-Nov'25 'PDS subsidized SKO' upliftment constituted to 60%. So far as sales in 'Other SKO' is concerned, agriculture accounted for 16% share,

Manufacturing 12%, and Miscellaneous applications at 71%.

Detailed Y-o-Y comparisons are pictorially presented in the next figure.

Figure: Cumulative 'PDS subsidized SKO' & 'Other SKO' sales breakup and Sectoral bifurcation of 'Other SKO' sales during 'Apr-Nov'25 and its YoY comparison with 'Apr-Nov'24



**BITUMEN:**

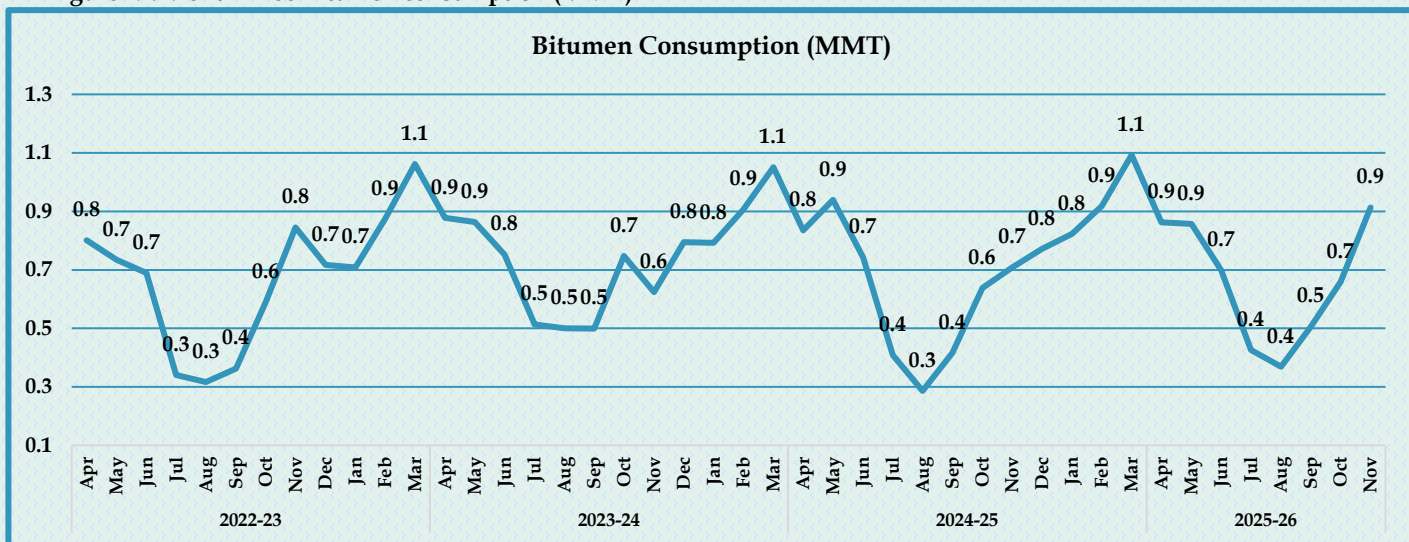
Bitumen consumption during Nov 2025 with a volume of 0.91 MMT registered growth of 29.0%

over the volume of 0.71 MMT in the month of Nov 2024. Bitumen demand growth in November 2025 is being driven primarily by sustained road and

highway construction activity, major government infrastructure programmes, and robust overall oil demand, although emerging signs of a slowdown in new project awards could moderate this momentum in the coming months.

Pan India based domestic Bitumen monthly consumption since April-22 is shown in the Fig-M.

Figure-M: Month-wise Bitumen consumption (MMT)



**Sectoral consumption of Bitumen:**

During 'Apr-Nov-25, total bitumen consumption with a volume of 5.29 MMT registered a growth of 6.3% Year-on Year basis over the volume of 4.98 MMT in 'Apr-Nov-24.

balance 2% was consumed by miscellaneous industries.

98% of cumulative bitumen sales during 'Apr-Nov-25-FY2025-26', was constituted to Road construction,

**LPG:**

LPG consumption during the month of Nov 2025 with a volume of 2.86 MMT registered growth in the month at 7.4% over the volume of 2.67 MMT in the month of Nov 2024. LPG consumption during the month continues to be largely driven by higher consumption in PMUY segment ,domestic packed share in total LPG is at 84.3% in Nov 25.

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.

The PMUY sales coupled with subsidized prices contributed to growth rate in LPG consumption. Growth in Bulk LPG contributed to total LPG growth.

1. 2.9% growth in Packed domestic LPG consumption in Nov'25 as compared to Nov'24.
2. Growth of 28.1% in non-domestic packed segment is due price reduction of 19kg cyl in Nov'25 (Rs. 1590.50) as compared to Nov'24 (1802.0).
3. Under PMUY scheme 10.35 crores beneficiaries at the end of Nov 2025.
4. As on 1.12.2025, total active domestic connections in India are 3309.5 lakhs

Growth in consumption of domestic LPG in Nov'25 compared to Nov'24 are as follows:

- PMUY growth 7.8% wherein OMCs-wise %growth as contributed by 8.7% (BPC), 8.5% (IOC) & 5.5% (HPC).
- Growth of 28.1% in non-domestic packed segment is due price advance of 19kg cyl in

Nov'25 (Rs. 1590.50) as compared to Nov'24 (1802.0).

- As of now, more than ~66.2% of non-PMUY consumers have DBCs connections and thus making a positive impact on LPG consumption. New connections ~100% issued with DBCs in Nov'25 (including SBC to DBC conversion).
5. 4.1 Crs cylinders of 14.2kg (~13.7 lacs/day) were delivered in Nov'25 compared to 3.8 Crs in Nov'24 in PMUY.
  6. Growth of 55.0% in Bulk LPG consumption due to following reasons:
    - Sales growth achieved due to LPG prices being substantially lower than NG which decides major share of our sales volume. Price variation of Bulk LPG in Nov'25 Rs. 70.1/kg as compared to Nov'24 rate was Rs. 77.4/kg.
    - Pan India based domestic LPG monthly consumption is shown in the Fig-O.

Figure-N: State Wise Growth in LPG month of Nov 25

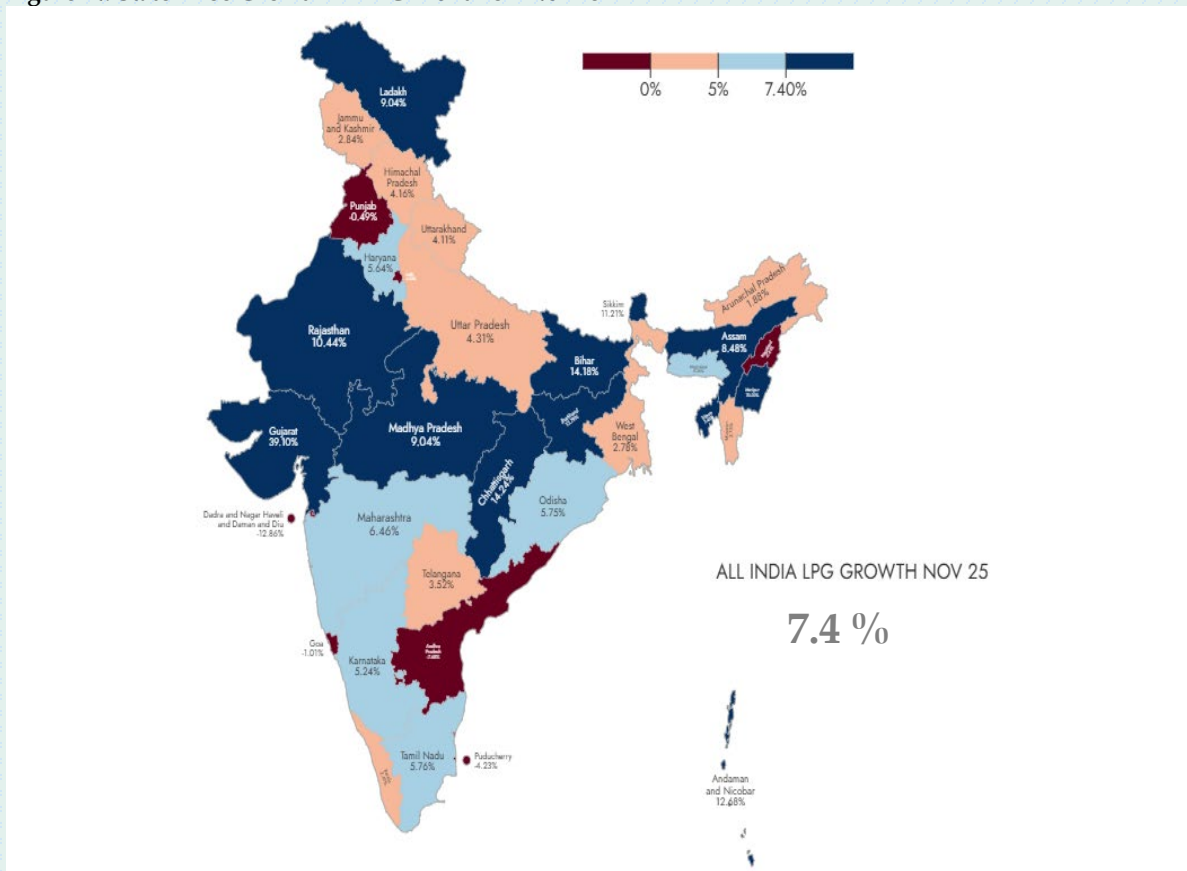
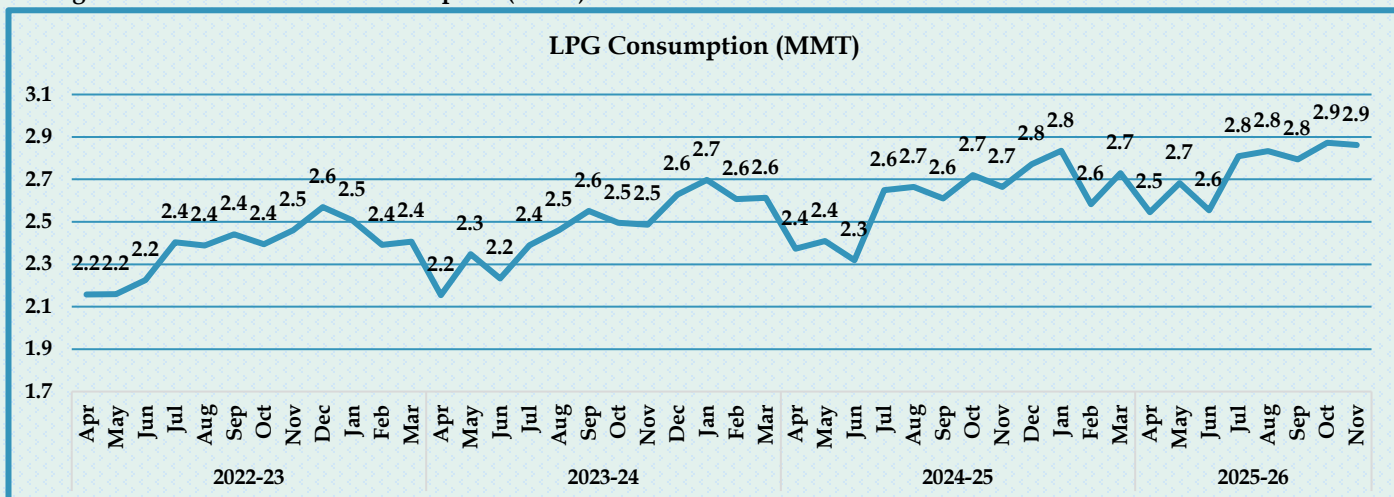


Figure-O: Month-wise LPG consumption (MMT)

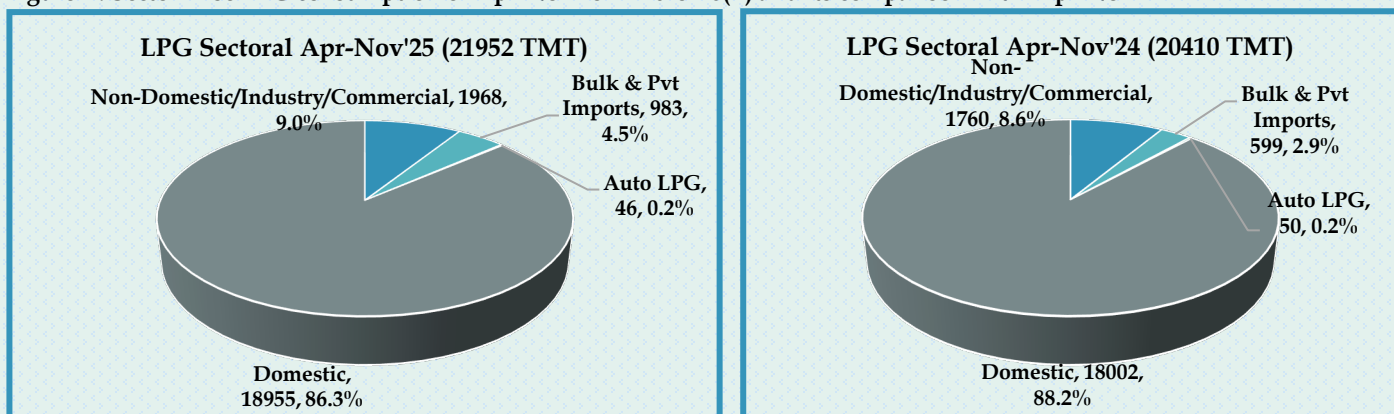


### Sectoral consumption of LPG:

During 'Apr-Nov-25, total LPG domestic consumption with a volume of 21.95 MMT registered 7.6% growth Year-on Year basis over the volume of 20.41 MMT in 'Apr-Nov-24.

The Sectoral LPG consumption during 'Apr-Nov-25', was driven by Domestic packed at 86.3%, followed by LPG 'non-domestic/ industry/ commercial sector 9.0% & Bulk at 4.5%. Auto LPG at 0.2% has been on the negative trajectory getting displaced by CNG.

Figure-P: Sector wise LPG consumption of Apr-Nov-25-FY2025-26(P) and its comparison with 'Apr-Nov-24



### Naphtha:

Naphtha consumption during Nov 2025 with a volume of 0.89 MMT registered a de-growth of 19.4%, over a volume of 1.1 MMT during the month of Nov 2024.

Petrochemical industries remain the main consumers of naphtha. Naphtha consumption showed a de-

growth during the Nov 25 due to restricted product availability and reduction in production. Gujarat is major consumption center, contributing 58 % to the total sales of naphtha in the country in November 25.

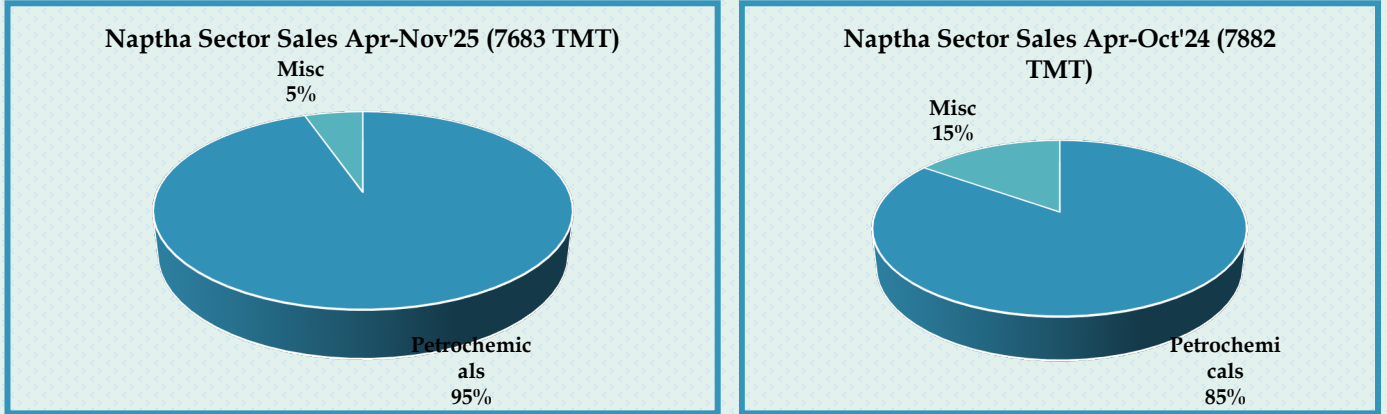
### Sectoral consumption of Naphtha:

During 'Apr-Nov-25, total Naphtha domestic consumption with a volume of 7.68 MMT registered de-growth of 14.4% Year-on Year basis over the volume of 8.98 MMT in 'Apr-Nov-24.

95% Consumption of naphtha during this period was driven by petrochemicals sector .

On YoY basis, detailed comparisons are pictorially presented in the following figure.

Figure-Q: Sector wise naphtha consumption of 'Apr-Nov-25 and its comparison to 'Apr-Nov-24



**ATF:**

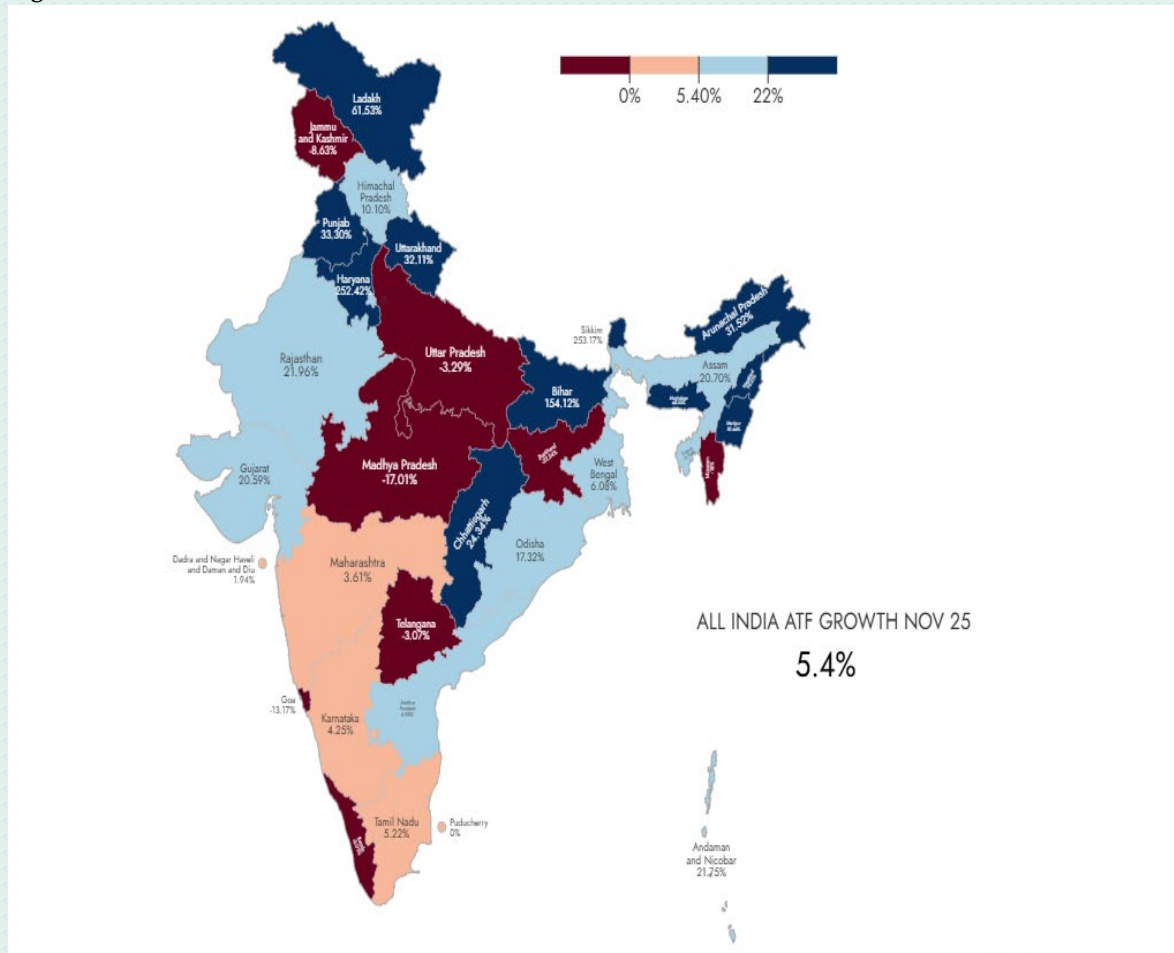
Aviation Turbine Fuel (ATF) consumption reached 0.788 MMT and sustained its growth trajectory over the past two months, registering a year-on-year increase of 5.4 % in November 2025. Cumulatively ATF consumption touched 5.97 MMT with growth of 1.6 % in 2025-26.

This growth primarily stems from rising air passenger traffic in recent months on account of winter tourism and

the reopening of a key runway at Delhi's Indira Gandhi International Airport, which enhanced operational capacity and flight frequencies.

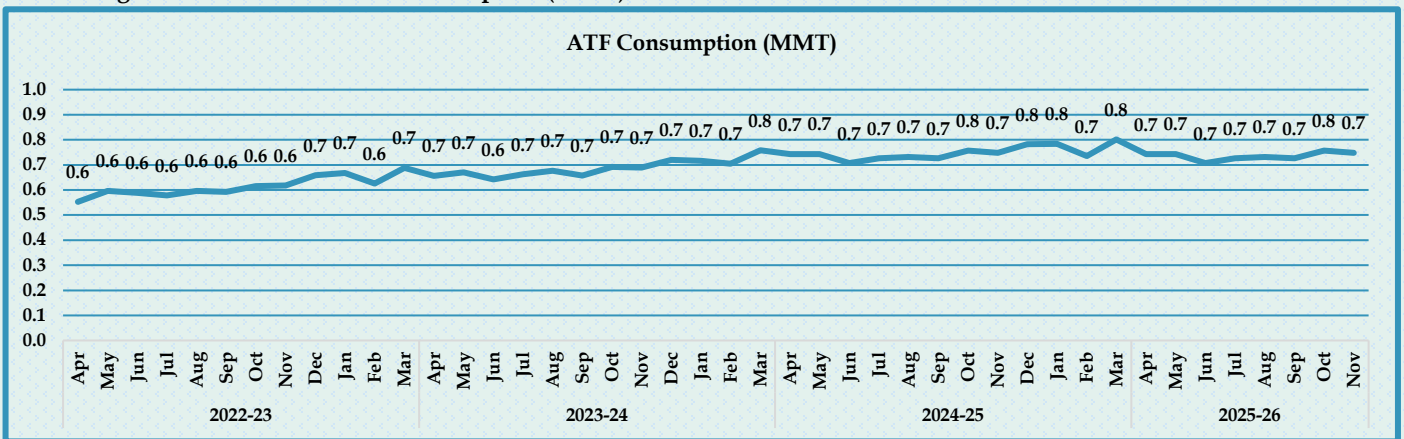
The opening of Hisar Airport has registered very high Aviation Turbine Fuel (ATF) growth for Haryana, registering a 150 % increase, while the reduction in VAT on ATF in Bihar has resulted in a remarkable surge in sales in Nov 25 .

Figure-R: State Wise Growth in ATF month of Nov-2025





Pan India based domestic ATF monthly consumption is given in following figure-S.  
**Figure-S: Month-wise ATF consumption (MMT)**



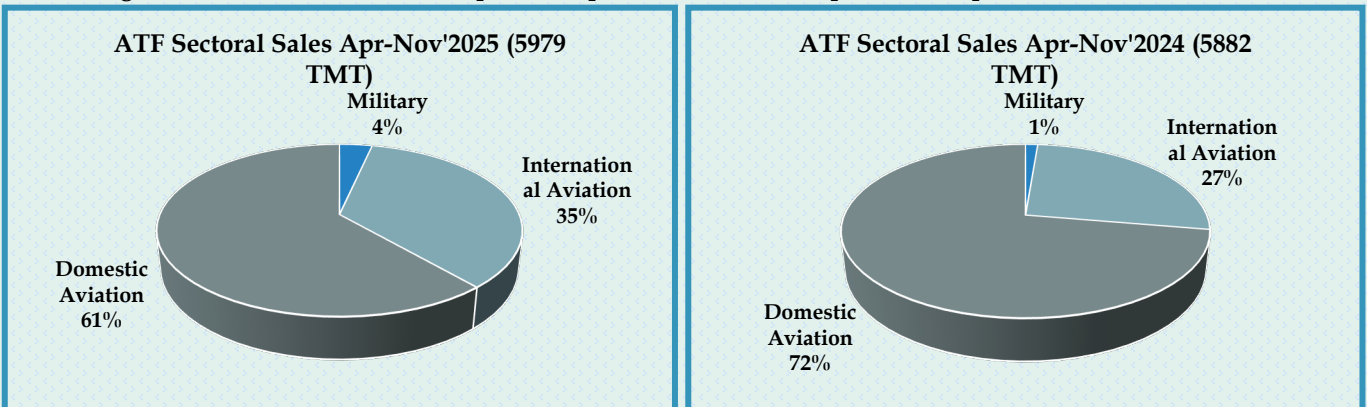
**Sectoral consumption of ATF:**

During 'Apr-Nov'25, total ATF domestic consumption with a volume of 5.98 MMT registered 1.6% growth Year-on-Year basis over the volume of 5.88 MMT in 'Apr-Nov-24.

Almost entire ATF consumption during 'Apr-Nov-25 was attributed to aviation; 61% domestic aviation, 35% international aviation & 4% Military aviation.

Details comparisons and YoY analysis are pictorially presented in the following figures, as per the details furnished by OMCs.

**Figure-T: Sector wise ATF consumption of Apr-Nov-25 and its comparison to 'Apr-Nov-24**



**Note : The above sectorisation is not on the basis of tax applicability and is provided by OMCs**

- During the month of October 2025, all operational airports (taken together) handled 253.39 thousand aircraft movements (excluding General Aviation Movements), 35.28 million passengers and 325.95 thousand tonnes of freight.
- The International aircraft movements, domestic aircraft movements and total aircraft movements have increased by 6.0%, 0.7% and 1.5% respectively during (April- October) 2025-26 as compared to (April- October) 2024- 25.
- The International passengers traffic, domestic passengers and total passenger traffic have increased by 7.3%, 1.9% and 2.9% respectively during the period (April- October ) 2025-26 as compared to (April- October)2024-25.
- The International freight traffic, domestic freight and total freight traffic have increased by 3.3%, 4.7% and 3.8% respectively during the period (April- October) 2025-26 as compared to (April- October) 2024-25.

The table below encapsulates details pertaining to aircraft movements during Oct'25 in the country:

**Table 8A: Details pertaining to aircraft movements during Oct'25 in the country**

CATEGORY	Oct		%
	2025-26	2024-25	CHANGE
<b>Aircraft Movements (in '000)</b>			
<b>International</b>	41.23	39.08	5.5
<b>Domestic</b>	212.16	207.78	2.1
<b>Total</b>	253.39	246.86	2.6
<b>General Aviation</b>	27.75	21.44	29.4
<b>Grand Total(INTL+DOM+Gen)</b>	<b>281.14</b>	<b>268.3</b>	<b>4.8</b>

**Table 8B: Region's wise trends in air traffic vis-à-vis ATF Consumption recorded at PPAC**

The region wise trends in air traffic vis-à-vis ATF Consumption recorded at PPAC has been tabulated below:

<b>REGION WISE TRENDS IN AIR TRAFFIC vis-à-vis ATF Consumption</b>								
<b>Oct</b>								
REGION	Oct		Change	REGION	Oct		Change	Difference
	2025-2026	2024-2025			2025-2026	2024-2025		
<b>AIRCRAFT MOVEMENTS ( IN NOS)</b>				<b>ATF CONSUMPTION (IN TMT)</b>				
<b>EASTERN</b>	27052	25483	6.2%	<b>EASTERN</b>	59	49	19.7%	<b>-13.6%</b>
<b>NORTH EAST</b>	8501	8154	4.3%	<b>NORTH EAST</b>	16	15	9.7%	<b>-5.4%</b>
<b>NORTHERN</b>	54767	55729	-1.7%	<b>NORTHERN</b>	280	283	-1.1%	<b>-0.6%</b>
<b>SOUTHERN</b>	66400	64243	3.4%	<b>SOUTHERN</b>	224	222	0.8%	<b>2.6%</b>
<b>WESTERN</b>	55444	54169	2.4%	<b>WESTERN</b>	193	187	3.3%	<b>-0.9%</b>
<b>Total</b>	<b>212164</b>	<b>207778</b>	<b>2.1%</b>	<b>Total</b>	<b>772</b>	<b>757</b>	<b>2.1%</b>	<b>0.0%</b>

The region wise ATF consumption in the country however varies owing to the difference in applicable VAT in the various states across the nation.

**Furnace oil & Low sulphur heavy stock (FO/LSHS):**

FO/LSHS consumption during Nov 2025 with a volume of 0.56 MMT with a growth of 10.8 % over the volume of 0.50 MMT in Nov-2024.

Somen factors attributing FO/LSHS consumption pattern are listed here:-

- Furnace Oil (FO) and Low Sulphur Heavy Stock (LSHS) is de growing primarily due to increased adoption of cleaner fuels, policy shifts favoring cleaner energy, stricter environmental regulations.
- Mining and Power Sector sector shown healthy growth for FO/LSHS in the month of Nov 25 .

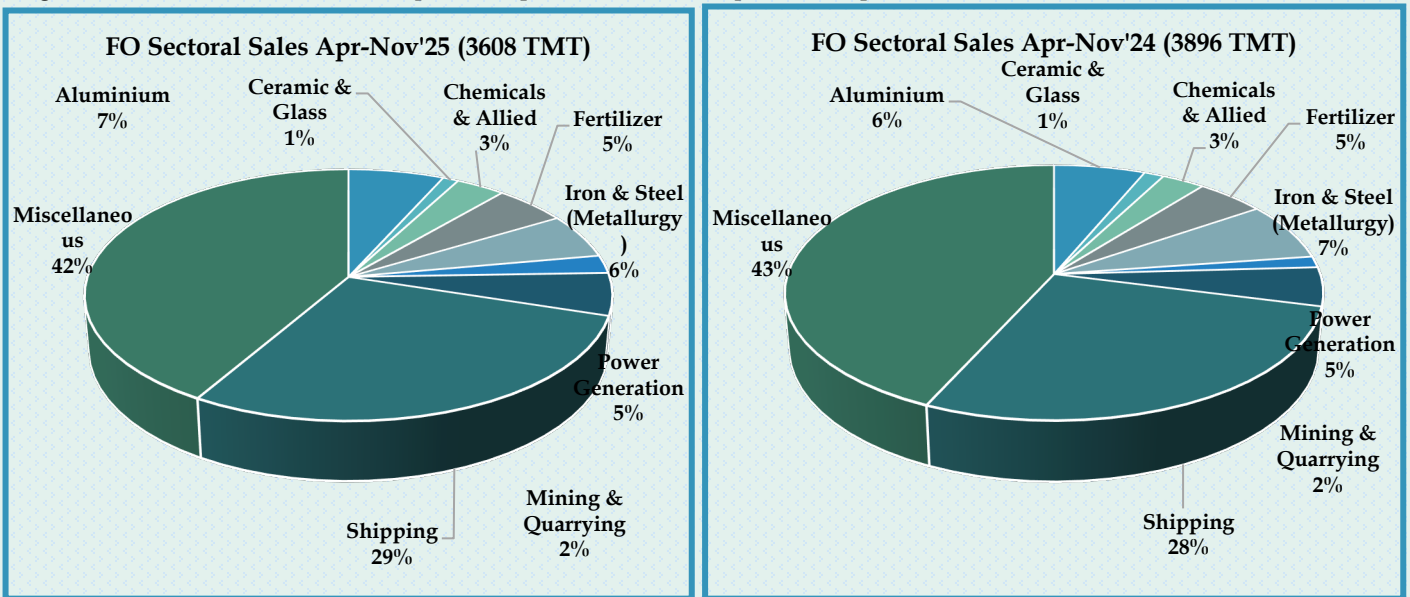
**Sectoral consumption of FO/LSHS:**

During 'Apr-Nov'25, total FO/LSHS consumption with a volume of 4.15 MMT with a de-growth of 6.3% Year-on Year basis over the volume of 4.43 MMT in 'Apr-Nov'24.

Further Product wise consumption for FO Apr-Nov'25 was 3.6 MMT vs 3.9 MMT in Apr-Nov'24 (7.4% de-growth). For LSHS, Apr-Nov'25 was 0.47 TMT vs 0.54 TMT in Apr-Nov'24 (11.7% De-growth

Details YoY comparisons are pictorially presented in the following figure.

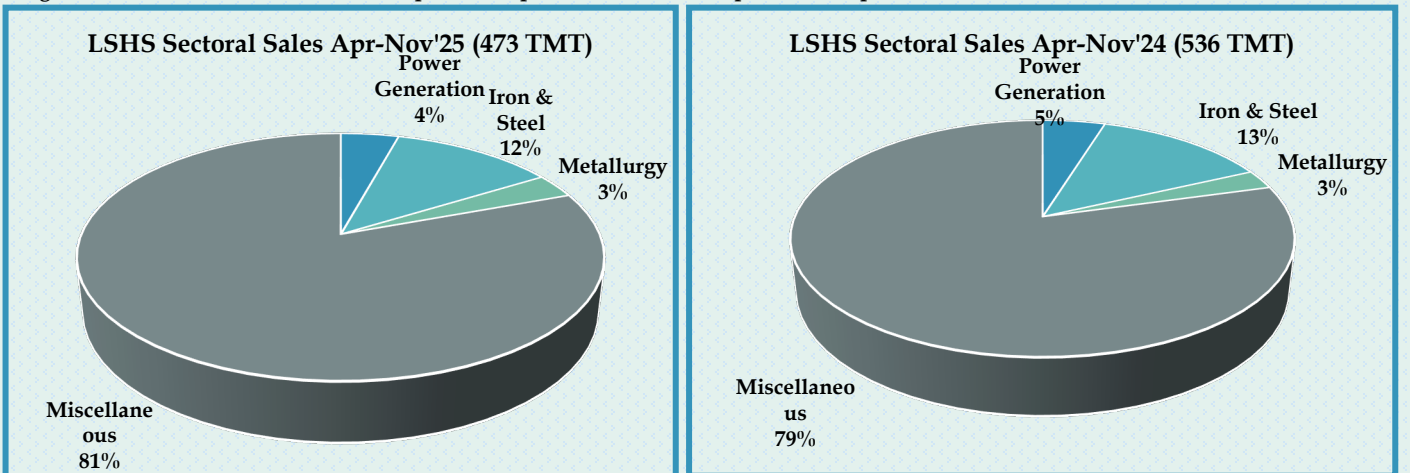
Figure-U: Sector wise FO+LSHS consumption of 'Apr-Nov'25 and its comparison to 'Apr-Nov'24



Apr-Nov'25:- Shipping sector has a share of 29%, up from 28% from previous period, followed by Iron & steel, fertilizer and Aluminium.

Apr-Nov'24:- Shipping contributes the highest share with 28% followed by Iron & Steel, Aluminium, Glass, Fertilizer & Power generation.

Figure-V: Sector wise FO+LSHS consumption of 'Apr-Nov'25 and its comparison to 'Apr-Nov'24



Apr-Nov'25:- Iron & Steel sector contributed to be the largest sector at 12%, followed by Power Generation 4%

Apr-Nov'24:- Iron & steel contributes the highest share with 13% followed by Power generation & Metallurgy

### Petcoke:

Petcoke consumption during the month of Nov 2025 with a volume of 1.78 MMT and de growth of 13.5% over the volume of 2.05 MMT in the same period last year. Around 60 % Pet coke is imported in the country in 2025-26

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:

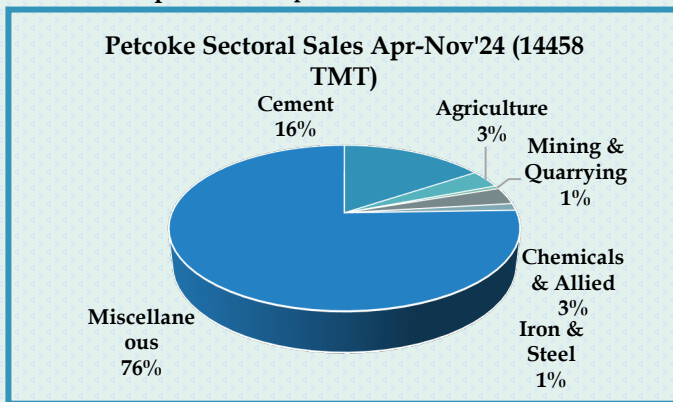
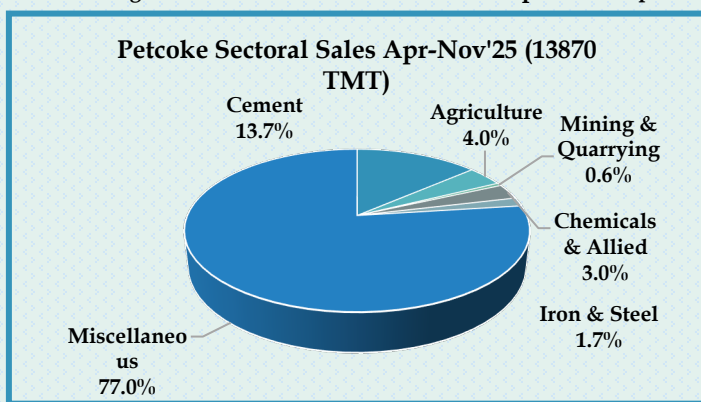
During 'Apr-Nov-25', total petcoke cumulative domestic consumption with a volume of 13.87 MMT

Various factors attributing to Petcoke consumption trend: Pet coke consumption experienced de-growth in November 2025 mainly due to a slowdown in industrial activity, weaker demand in key consuming sectors like cement, and competitive pricing of alternative fuels like coal that incentivized switching away from pet coke. **Imported Petcoke witnessed a de growth of 11 % in November 25 .**

registered 4.1% de-growth Year-on Year basis over the volume of 14.46 MMT in 'Apr-Nov-24'. The cement sector continues to occupy the largest share in 'Apr-Nov-25' (P) at 14% followed by other Industries.

On YoY basis, sectoral consumption for Apr-Nov'25 is shown in the following figures:-

Figure-W: Sector wise Petcoke consumption of 'Apr-Nov'25 and its comparison to 'Apr-Nov'24



Apr-Nov'25:- Cement industry occupied the highest share at 14%

Apr-Nov'24:- Cement industry occupied the highest share at 16%, followed by other sectors.

### Light Diesel Oil

LDO consumption during the month Nov 2025 with a volume of 88 TMT registered a 9.7% growth over the volume of 80 TMT in Nov 2024.

Nov 2025 LDO consumption growth was attributed to following reasons:- Conversion of FO to LDO on

account of pollution rules compliances in various states contributing in the growth of LDO.

Demand in Power generation plant also contributed to Jump in Nov 25 . LDO consumption in the power sector is primarily associated with initial light-ups of the power plant.

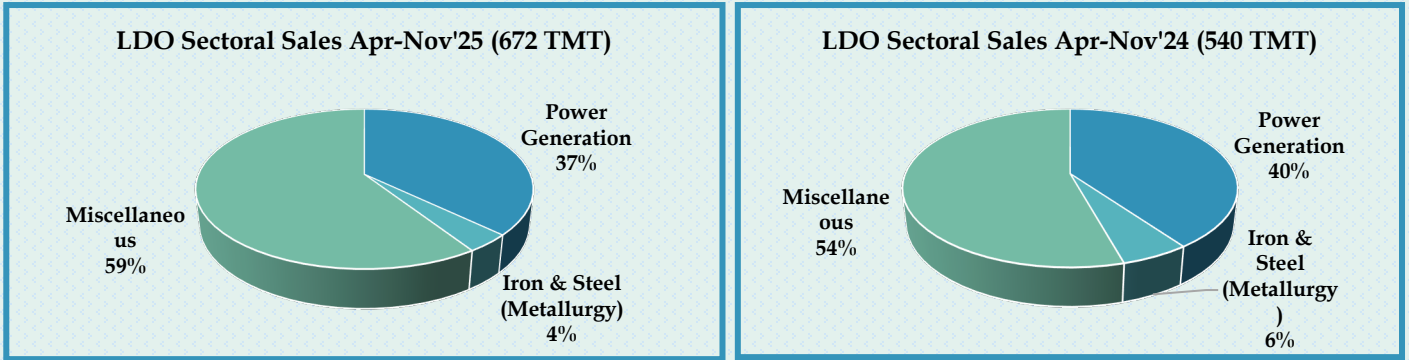
### Sectoral consumption of Light Diesel Oil:

During 'Apr-Nov-25, total LDO domestic consumption with a volume of 0.67 MMT registered a 24.6% growth Year-on Year basis over the volume of 0.54 MMT in 'Apr-Nov-24.

The cumulative consumption of Light Diesel oil (LDO) during 'Apr-Nov'25' was driven by 'Power Generation' 37% followed by Iron & Steel at 4%.

Detailed comparisons are pictorially presented in the following figure

Figure-X: Sector wise LDO consumption of 'Apr-Nov-25 and its comparison to Apr-Nov-24



Apr-Nov'25:-Power Generation occupied a 37% share for the product followed by Iron & Steel & Misc industries	Apr-Nov'24:-Power Generation occupied a 40% share for the product followed by Iron & Steel & Misc industries
--	--

**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.

For the monthly consumption data, please refer NG report published by PPAC.

Total Natural Gas Consumption (including internal consumption) for the month of November 2025 (P) was 5707 MMSCM which was 1% higher than the corresponding month of the previous

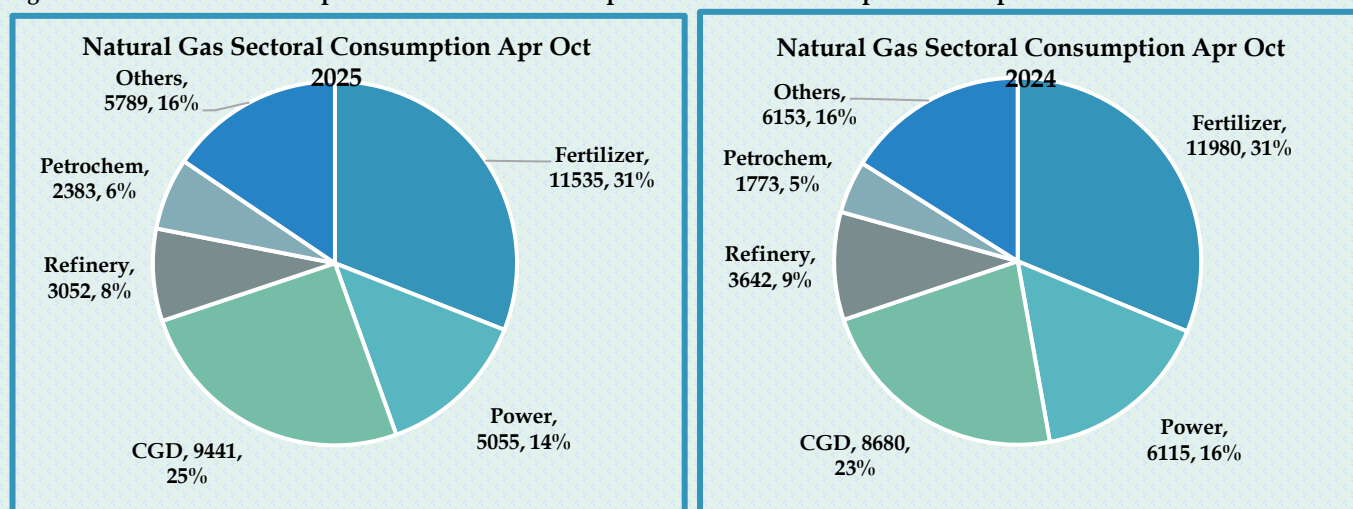
year. The cumulative consumption of 46239 MMSCM for the current financial year till November 2025 was lower by 6.1% compared with the corresponding period of the previous year.

Sectoral consumption of Natural Gas consumption of 'Apr-Oct'25' & its comparison to 'Apr-Oct'24: (PROVISIONAL)

During Apr-Oct25, total Natural Gas monthly domestic consumption with a volume of 37,255 MMSCM, over the volume of 33,343 MMSCM during the same period in the preceeding year. During Apr-Oct'25, consumption of Natural gas (NG) was driven by fertilizer (31%) followed by CGD (25%), Power (14%) Refinery (8%), Petrochemicals (6%). Misc sectors occupied a share of 16% in Apr-Oct2025.



Figure-Y: Sector wise consumption of Natural Gas of Apr-Oct 2025 and its comparison to April-Oct 2024



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

P: provisional

**Apr-Oct'2025** Fertilizer sector occupied the highest share for the Consumption of Natural Gas at 31% with the share of CGD increasing steadily.

**Apr-Oct'2024** Fertilizer sector occupied the highest share followed by CGD.

Table-9: 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

**Table-10**

Industry Consumption Trend Analysis 2025-26 (Provisional)												
('000 MT)												
Product	April-November 2025-26			November								
	FY2024-25	FY2025-26	Growth(%)_2025-26 over 2024-25	2021	2022	2023	2024	2025	Growth(%)_2025 over 2021	Growth(%)_2025 over 2022	Growth(%)_2025 over 2023	Growth(%)_2025 over 2024
<b>(A) Sensitive Products</b>												
LPG	20410	21952	7.6	2336	2461	2487	2665	2862	22.5	16.3	15.1	7.4
SKO	273	299	9.2	123	38	45	36	43	-65.2	11.5	-3.8	19.2
<b>Sub Total</b>	<b>20684</b>	<b>22251</b>	<b>7.6</b>	<b>2459</b>	<b>2500</b>	<b>2531</b>	<b>2701</b>	<b>2905</b>	<b>18.1</b>	<b>16.2</b>	<b>14.8</b>	<b>7.6</b>
<b>(B) Major Decontrolled Product</b>												
HSD	60194	61856	2.8	6506	7763	7525	8166	8552	31.5	10.2	13.6	4.7
MS	26690	28372	6.3	2645	2861	3129	3428	3517	33.0	22.9	12.4	2.6
Naphtha	8981	7683	-14.4	1066	931	1047	1098	886	-16.9	-4.9	-15.4	-19.4
ATF	5882	5979	1.6	504	618	690	748	788	56.4	27.6	14.3	5.4
Bitumen	4976	5291	6.3	547	845	624	708	913	67.1	8.0	46.4	29.0
FO & LSHS	4432	4152	-6.3	500	582	513	505	560	12.0	-3.7	9.1	10.8
Lubricants & Greases	3020	3138	3.9	354	302	353	351	391	10.6	29.6	10.8	11.3
LDO	540	672	24.6	65	57	54	80	88	35.2	54.5	61.3	9.7
<b>Sub Total</b>	<b>114714</b>	<b>117143</b>	<b>2.1</b>	<b>12186</b>	<b>13959</b>	<b>13935</b>	<b>15085</b>	<b>15695</b>	<b>28.8</b>	<b>12.4</b>	<b>12.6</b>	<b>4.0</b>
<b>Sub - Total (A) + (B)</b>	<b>135398</b>	<b>139394</b>	<b>3.0</b>	<b>14645</b>	<b>16458</b>	<b>16466</b>	<b>17786</b>	<b>18600</b>	<b>27.0</b>	<b>13.0</b>	<b>13.0</b>	<b>4.6</b>
<b>(C) Other Minor Decontrolled Products</b>												
Petroleum coke	14458	13870	-4.1	926	1515	1333	2057	1780	92.2	17.5	33.5	-13.5
Others	8148	6904	-15.3	1143	1128	884	813	892	-22.0	-20.9	0.9	9.7
<b>Sub Total</b>	<b>22606</b>	<b>20774</b>	<b>-8.1</b>	<b>2070</b>	<b>2642</b>	<b>2218</b>	<b>2870</b>	<b>2672</b>	<b>29.1</b>	<b>1.1</b>	<b>20.5</b>	<b>-6.9</b>
<b>Total</b>	<b>158004</b>	<b>160168</b>	<b>1.4</b>	<b>16715</b>	<b>19101</b>	<b>18684</b>	<b>20656</b>	<b>21272</b>	<b>27.3</b>	<b>11.4</b>	<b>13.9</b>	<b>3.0</b>

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

**Table-11**

Industry Consumption Trend Analysis 2025-26 (Provisional)												
('Million Barrels per Day)												
Product	April-November 2025-26			November								
	FY2024-25	FY2025-26	Growth(%)_2025-26 over 2024-25	2021	2022	2023	2024	2025	Growth(%)_2025 over2021	Growth(%)_2025 over2022	Growth(%)_2025 over2023	Growth(%)_2025 over2024
<b>(A) Sensitive Products</b>												
LPG	0.97	1.04	7.6%	0.90	0.95	0.96	1.03	1.11	22.5%	16.3%	15.1%	7.4%
SKO	0.01	0.0098	9.2%	0.03	0.01	0.01	0.01	0.01	-65.2%	11.5%	-3.8%	19.2%
Sub Total	1.0	1.0	7.6%	0.9	1.0	1.0	1.0	1.1	19.4%	16.2%	14.9%	7.5%
<b>(B) Major Decontrolled Product</b>												
HSD	1.87	1.92	2.8%	1.65	1.97	1.91	2.07	2.17	31.5%	10.2%	13.6%	4.7%
MS	0.97	1.03	6.3%	0.78	0.85	0.93	1.01	1.04	33.0%	22.9%	12.4%	2.6%
Naphtha	0.32	0.27	-14.4%	0.31	0.27	0.30	0.32	0.26	-16.9%	-4.9%	-15.4%	-19.4%
ATF	0.19	0.20	1.6%	0.14	0.17	0.19	0.20	0.21	56.4%	27.6%	14.3%	5.4%
Bitumen	0.12	0.13	6.3%	0.11	0.17	0.13	0.14	0.18	67.1%	8.0%	46.4%	29.0%
FO & LSHS	0.12	0.11	-6.3%	0.11	0.13	0.12	0.11	0.13	12.0%	-3.7%	9.1%	10.8%
Lubricants & Greases	0.09	0.09	3.9%	0.09	0.07	0.09	0.08	0.09	10.6%	29.6%	10.8%	11.3%
LDO	0.02	0.02	24.6%	0.02	0.01	0.01	0.02	0.02	35.2%	54.5%	61.3%	9.7%
Sub Total	3.7	3.8	2.1%	3.2	3.6	3.7	4.0	4.1	28.2%	12.8%	12.0%	3.5%
Sub - Total (A) + (B)	4.7	4.8	3.2%	4.1	4.6	4.6	5.0	5.2	26.2%	13.5%	12.6%	4.3%
<b>(C) Other Minor Decontrolled Products</b>												
Petroleum coke	0.33	0.31	-4.1%	0.17	0.28	0.25	0.38	0.33	92.2%	17.5%	33.5%	-13.5%
Others	0.27	0.23	-15.3%	0.31	0.30	0.24	0.22	0.24	-22.0%	-20.9%	0.9%	9.7%
Sub Total	0.6	0.5	-9.1%	0.5	0.6	0.5	0.6	0.6	18.8%	-2.5%	17.4%	-5.0%
<b>Total</b>	<b>5.3</b>	<b>5.37</b>	<b>1.8%</b>	<b>4.6</b>	<b>5.2</b>	<b>5.1</b>	<b>5.6</b>	<b>5.8</b>	<b>25.4%</b>	<b>11.7%</b>	<b>13.1%</b>	<b>3.3%</b>

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



## **Petroleum Planning & Analysis Cell**

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