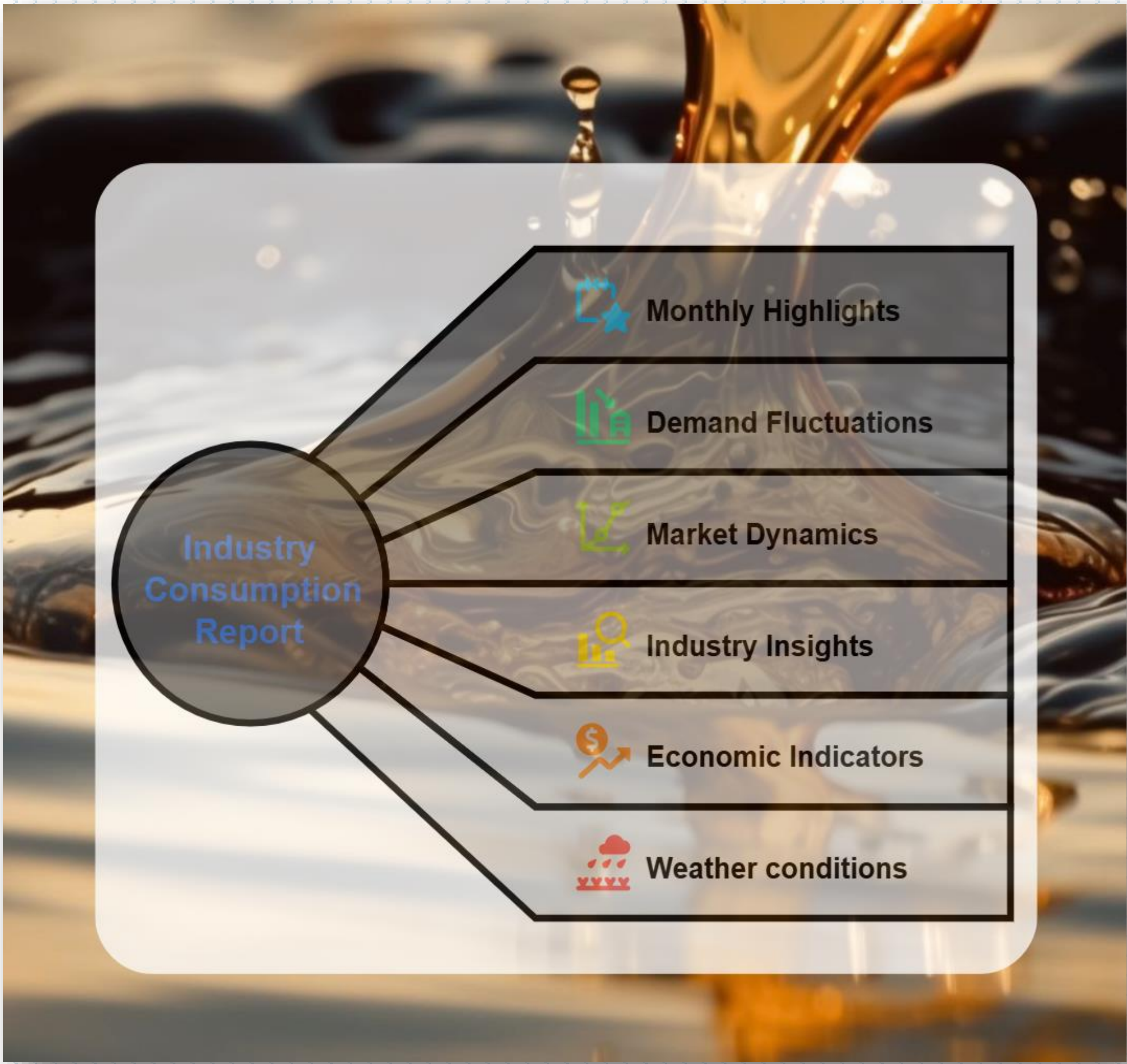

INDUSTRY CONSUMPTION REPORT POL & NG

OCTOBER 2025

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CIRCULATION:

पेट्रोलियम और प्राकृतिक गैस मंत्रालय:	MoP&NG:
निजी सचिव- माननीय मंत्री - (पेट्रोलियम और प्राकृतिक गैस) ओ एस डी- माननीय मंत्री - (पेट्रोलियम और प्राकृतिक गैस) निजी सचिव- माननीय राज्य मंत्री - (पेट्रोलियम और प्राकृतिक गैस) सचिव, पीएनजी अपर सचिव, पीएनजी अपर सचिव एवं वित्त सलाहकार संयुक्त सचिव (रिफाइनरी 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) **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 एनर्जी महानिदेशक, फिपी प्रबंध निदेशक-एनआरएल, गुवाहाटी/सीपीसीएल, चेन्नई/एमआरपीएल, मंगलुरु ओएमसी योजना एवं रिटेल ग्रुप – एचओ	PS to Hon'ble Minister (P&NG) OSD to Hon'ble Minister (P& NG) PS to Hon'ble Minister of State (P&NG) Secretary, P&NG Additional Secretary, P&NG Additional Secretary & Financial Advisor Jt. Secretary (Refinery & 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 Energy DG, FIPI MD- NRL, Guwahati/ CPCL, Chennai/ MRPL, Mangalore OMCs Planning & Retail Groups – HO

संख्या : डी-12013/02/2025-I
No. D-12013/02/2025-I

Subject: Industry Consumption Review Report of PPAC: OCT 2025

The monthly Petroleum Industry Consumption Review Report has been prepared by the Petroleum Planning and Analysis Cell (PPAC) for the month of OCT 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.

धन्यवाद,

Thanking you,

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

Highlights of the month: OCT 2025

- Oil and Natural Gas Corporation Limited (ONGC) is set to invest ₹8,110 crore for onshore development and production of oil and gas from 172 wells in eight PML (petroleum mining lease) blocks in Andhra Pradesh.

- Oil India and Mahanagar Gas have signed an MoU to explore opportunities across the LNG value chain and clean energy projects.

- In a significant move to enhance India's shift towards a gas-based economy, Bharat Petroleum Corporation Limited (BPCL) and Reliance BP Mobility Limited (RBML) have announced a new partnership. This collaboration aims to expand City Gas Distribution (CGD) and boost Compressed Natural Gas (CNG) sales across the country .

- India proposes to open up retail power sector nationwide to private firms, as per draft bill .

- Uttar Pradesh has announced two free LPG refills to about 1.86 crore women beneficiaries (PMUY). The free refills are being distributed in two phases to ease the financial burden ahead of the festivals .

- Indian-backed oil refinery in Mongolia will begin operations in 2028, as per Foreign ministry statement.

- NTPC has invited bids for the development, designing and setting up of 1,800 tonnes per year of sustainable aviation fuel (SAF) plant at Pudimadaka in Andhra Pradesh.

- India secures first global order to build LNG-powered container ships worth $300 million by Cochin shipyard .

- BPCL, OIL to explore collaboration for proposed refinery in Andhra Pradesh.

- The HSBC India Manufacturing PMI rose to 59.2 in October 2025, above the flash estimate of 58.4 and September's 57.7, signaling faster growth in factory activity. The HSBC India Services PMI eased to 58.9 in October 2025, its slowest pace since May, indicating continued growth but a sequential slowdown.

- **GST revenue collected for October 2025 is ₹1,95,936 crores**, registering a **4.6% increase** compared to ₹1,87,346 crores for the same month last year. The sharp rise in GST collections in the onset of the recent GST rate rationalisation in late September 2025 indicates sustained consumer demand during the festive season.

- India's inflation rate based on the Consumer Price Index (CPI) for October 2025 was 0.25%, marking a historic low and reflecting a substantial drop compared to previous month .

SUMMARY OF PRODUCT WISE POL

1. In October 2025, India's petroleum product consumption reached 20.17 million metric tonnes (MMT) with a marginal de-growth of 0.4% over 20.25 MMT in October 24.

2. Petrol (MS) consumption for October 2025 was 3.7 MMT (1.05 million barrels per day), reflecting an 7.4% growth over 3.4 MMT (0.98 mbpd) in October 2024

3. Ethanol blending in Petrol was 19.97% during Oct '25 and cumulative ethanol blending during November 2024- October '2025 was 19.2%.

4. The Domestic Sale of Passenger Vehicles in Oct 2025 with a volume of 5.57 lacs registered growth of 11.35% over Oct 2024, as per FADA. Reduction in GST rates on vehicles has significantly boosted passenger vehicle (PV) demand during the festive season leading to record dealership footfalls .

5. HSD (Diesel) consumption during the month of Oct 2025 with a volume of 7.62 MMT (1.87 mbpd) registered a de-growth of 0.3% over the volume of 7.65 MMT (1.88 mbpd) in the month of Oct 2024.

6. LPG consumption during the month of Oct 2025 with a volume of 2.87 MMT registering a growth of 5.6% over the volume of 2.72 MMT in Oct 2024. LPG has been growing since last year riding on growth in PMUY segment alongwith good Bulk LPG growth.

7. ATF (Aviation Turbine Fuel) consumption for October 2025 was 0.77 MMT, recording a growth of 2.1% from 0.76 MMT in October 2024

8. Bitumen consumption during Oct 2025 with a volume of 0.66 MMT registered a growth of 3.0 % over the volume of 0.64 MMT in the month of Oct 2024.

9. Kerosene (SKO) consumption with a volume of 43 TMT registered a growth of 32.8% in Oct 2025 as compared to Oct 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 October 2025 (P) was 5722 MMSCM which was 14.6% lower than the corresponding month of the previous year. The cumulative consumption of 40068 MMSCM for the current financial year till October 2025 was lower by 8.1% compared with the corresponding period of the previous year.

11. As on 31st Oct'2025, number of active LPG domestic connections are 33.08 cr and PMUY connections 10.33 cr

This report analyses the trend of consumption of petroleum products in the country during the month of Oct 2025. Data on product-wise monthly consumption of petroleum products for Oct 2025 is uploaded on the PPAC website (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.

The growth percentage in consumption of petroleum products, category-wise, for the month of Oct 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-October 2025

Product	October (TMT)				April-Octoberber (TMT)			
	2024	2025	% share of October'25	Growth (%)	2024-25	2025-26	Growth (%)	% share of Apr-Oct'25
(A) Sensitive Products								
LPG	2721	2873	14.2	5.6	17746	19100	7.6	13.7
SKO	33	43	0.2	32.8	237	256	7.6	0.2
Sub Total	**2753**	**2917**	**14.5**	**5.9**	**17983**	**19356**	**7.6**	**13.9**
(B) Major Decontrolled Product								
HSD	7645	7619	37.8	-0.3	52028	53306	2.5	38.4
MS	3412	3665	18.2	7.4	23262	24855	6.8	17.9
Naphtha	1164	892	4.4	-23.4	7882	6711	-14.9	4.8
ATF	757	773	3.8	2.1	5134	5191	1.1	3.7
Bitumen	638	657	3.3	3.0	4268	4435	3.9	3.2
FO/LSHS	631	585	2.9	-7.4	3927	3600	-8.3	2.6
Lubes+Greases	346	362	1.8	4.7	2669	2675	0.2	1.9
LDO	69	75	0.4	9.1	459	585	27.2	0.4
Sub Total	**14663**	**14628**	**72.5**	**-0.2**	**99629**	**101356**	**1.7**	**72.9**
(C) Other Minor Decontrolled Products								
Pet.Coke	2035	1749	8.7	-14.1	12401	12199	-1.6	8.8
Others*	803	874	4.3	8.8	7335	6046	-17.6	4.4
Sub Total	**2838**	**2623**	**13.0**	**-7.6**	**19736**	**18245**	**-7.6**	**13.1**
Total	**20254**	**20168**	**100**	**-0.4**	**137347**	**138958**	**1.2**	**100**

**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 Sep'25-Oct'25, which may undergo change on receipt of actual data), and

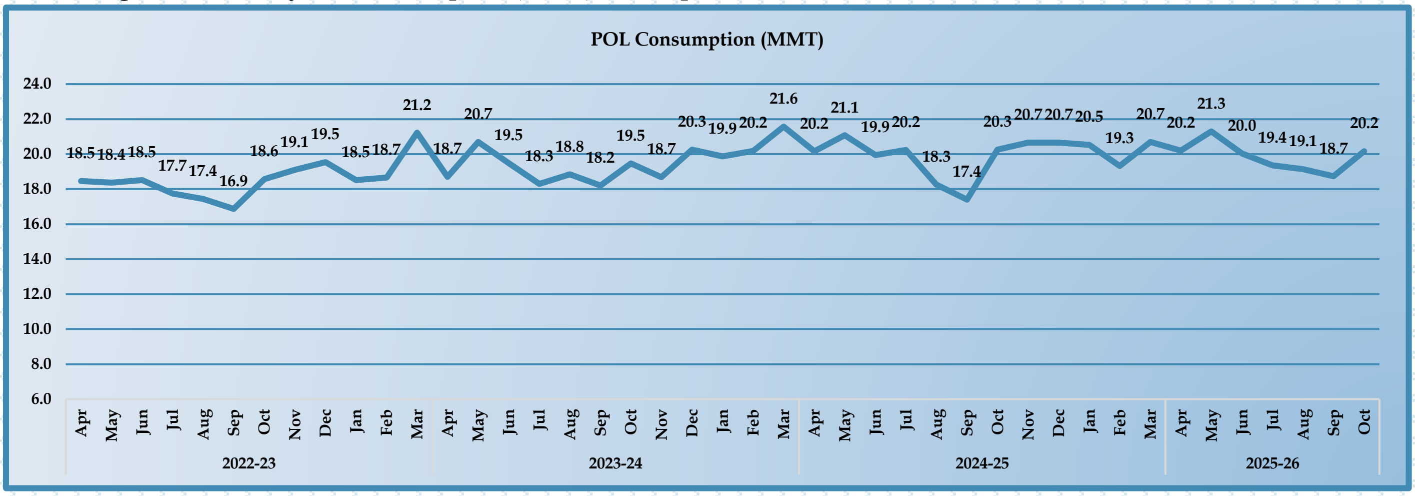
(c) sales by SEZ units in Domestic Tariff Area (DTA) are provisional due to portal upgrade.

India's petroleum product consumption in October 2025 was 20.17 million tonnes. This is 0.4% less than in October 2024. This consumption was primarily driven by higher demand for petrol (MS) at 7.4%, diesel (ATF) at 2.1%, LPG at 5.6%, and lubricants at 4.7%.

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.

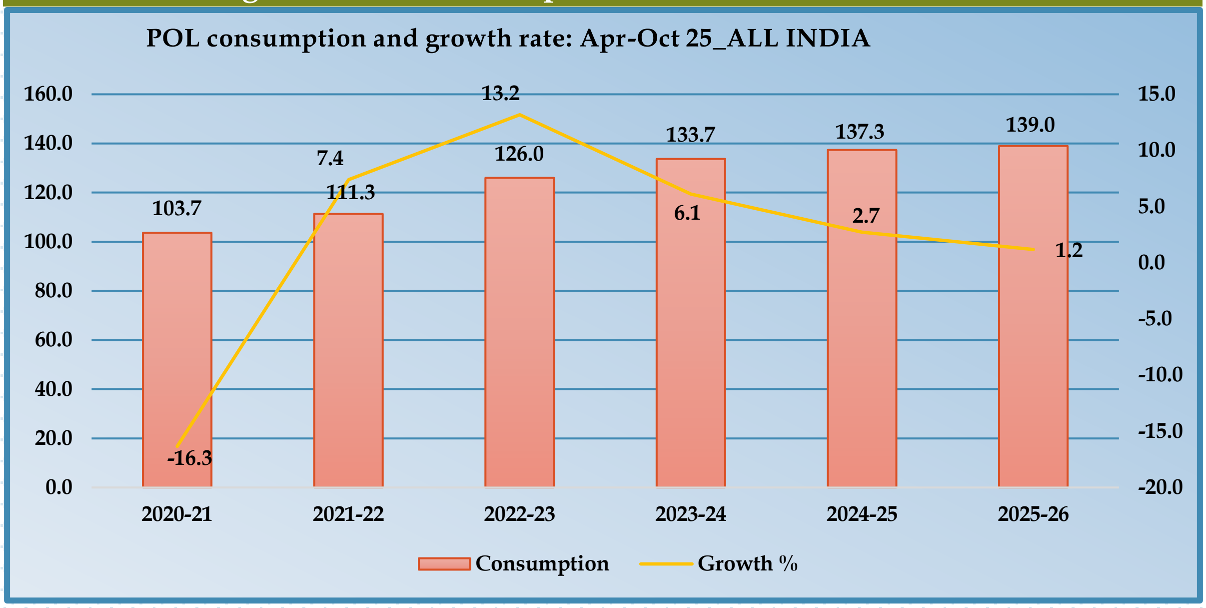
Pan India based domestic POL monthly consumption trend since April-2022 is shown in Figure-A.

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



- ✓ The overall POL domestic consumption profile of the Oct 2025 & its pattern since 2020 with corresponding consequitive YoY growth rates are shwon 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):

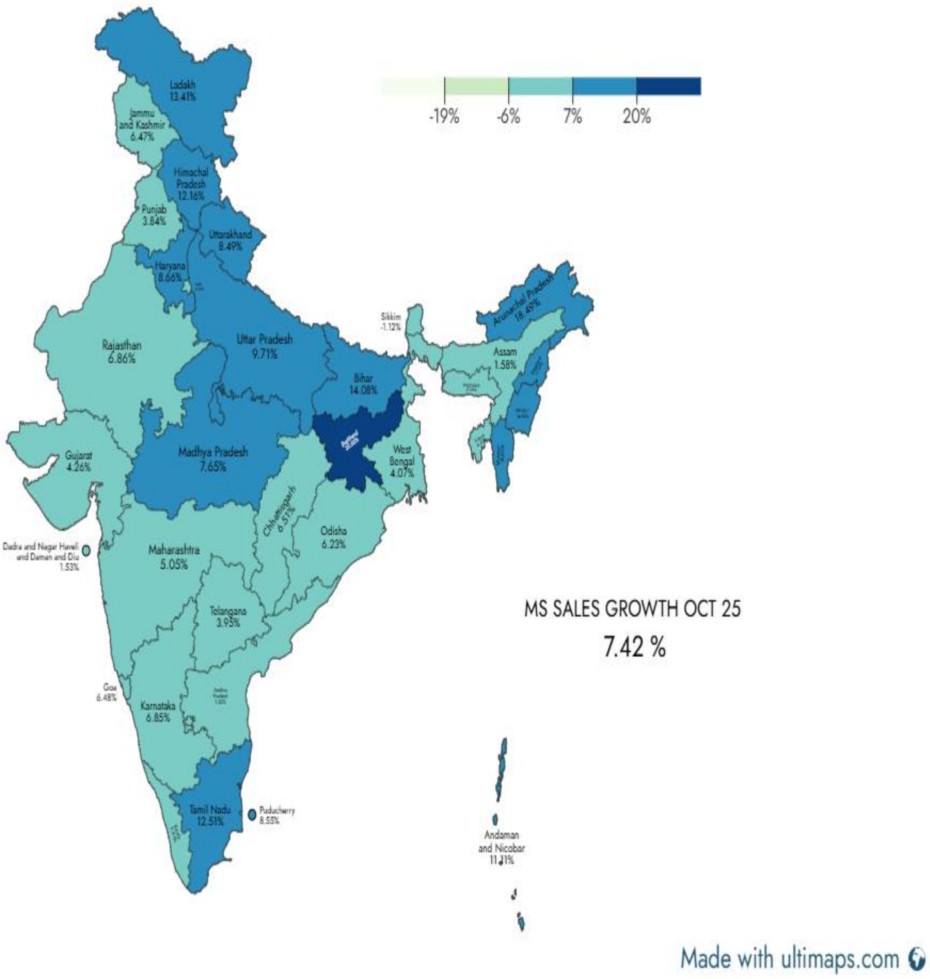
MS (Petrol) consumption during the month of Oct 2025 with a volume of 3.67 MMT recorded a growth of 7.4% on the volume of 3.41 MMT in Oct 2024. Cummutively MS is growing at 6.8 % from Apr-Oct 25 period.

PSU's registered a growth rate of 6.5% as against 16.8% achieved by their private sector counterparts in Oct-25.

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

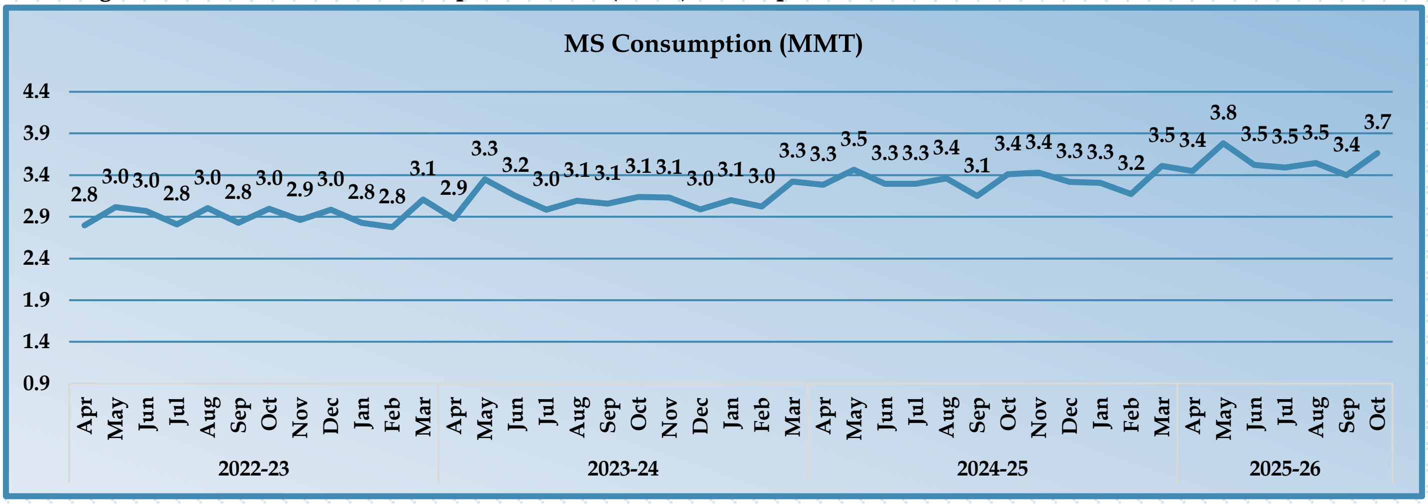
- Motor Spirit (MS) consumption in October 2025 registered a strong year-on-year growth of 7.4%.
- The surge in demand for passenger vehicles (PV) and two-wheelers (2W) has significantly contributed to the rise in MS consumption, as both segments experienced notable sales growth during the same period.
- Big states like Uttar Pradesh and Madhya Pradesh have grown above the National Avg growth of 7.42 % in Oct 25 .
- Increase in mobility during festival season,which boosted travel have also contributed in increasing the MS sales.

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



Factors impacting consumption of MS:

Passenger Vehicle Sales:

The Sale of Passenger Vehicles in Oct 2025 at 5.57 lacs registered 11.3% growth YoY basis over sale of 5.01 lacs in the month of Oct 2024. The details of various segmnets of PVs are tabulated below, as shown in the following Table-2.

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

Vehicle Segment	Oct 25		
	2024	**2025**	**Growth %age**
Total PV	500,578	557,373	11.3%

Source: FADA

Two-Wheeler Sales:

Two-wheeler sales in Oct 2025 with a volume of 31.50 lacs registered 51.8% growth, YoY basis over volume of 20.76 lacs during Oct 2024, as shown in the following table-3.

Three-Wheeler sales

Three-wheeler domestic sales in Oct 2025 with a volume of 1.29 lac recorded a growth of 5.3%, YoY basis over the volume of 1.23 lac in Oct 2024, as shown in the following table-3

Table-3: Two & Three Wheelers vehicle sales in the month of Oct 2025 & YoY comparison (Primary sales data)

Vehicle Segment	Oct'25		
	2024	**2025**	**Growth %age**
Total Two Wheelers	2,075,578	3,149,846	51.8%
Passenger Carrier-3 wheeler	60,171	69,937	16.2%
Goods Carrier-3 wheeler	12,719	15,239	19.8%
E-Rickshaw	43,975	37,117	-15.6%
E-cart	5,891	6,979	18.5%
Total Three Wheelers	122,756	129,272	5.3%

Source: FADA

High Speed Diesel (HSD):

HSD (Diesel) consumption during the month of Oct 2025 with a volume of 7.62 MMT, registered a de-growth of 0.3% on the volume of 7.65 MMT in the month of Oct 2024.

- PSU's registered a 0.9% de-growth their private sector 3.8% growth in the month of Oct-25.

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

- Majority of HSD growth coming from Direct sales which achieved a growth of 15.2 % in Apr-Oct 25. Retail segment grew at 1.7 % in the same period. HSD consumption in Major sectors like Manufacturing showing healthy growth during Apr -Oct 25 period

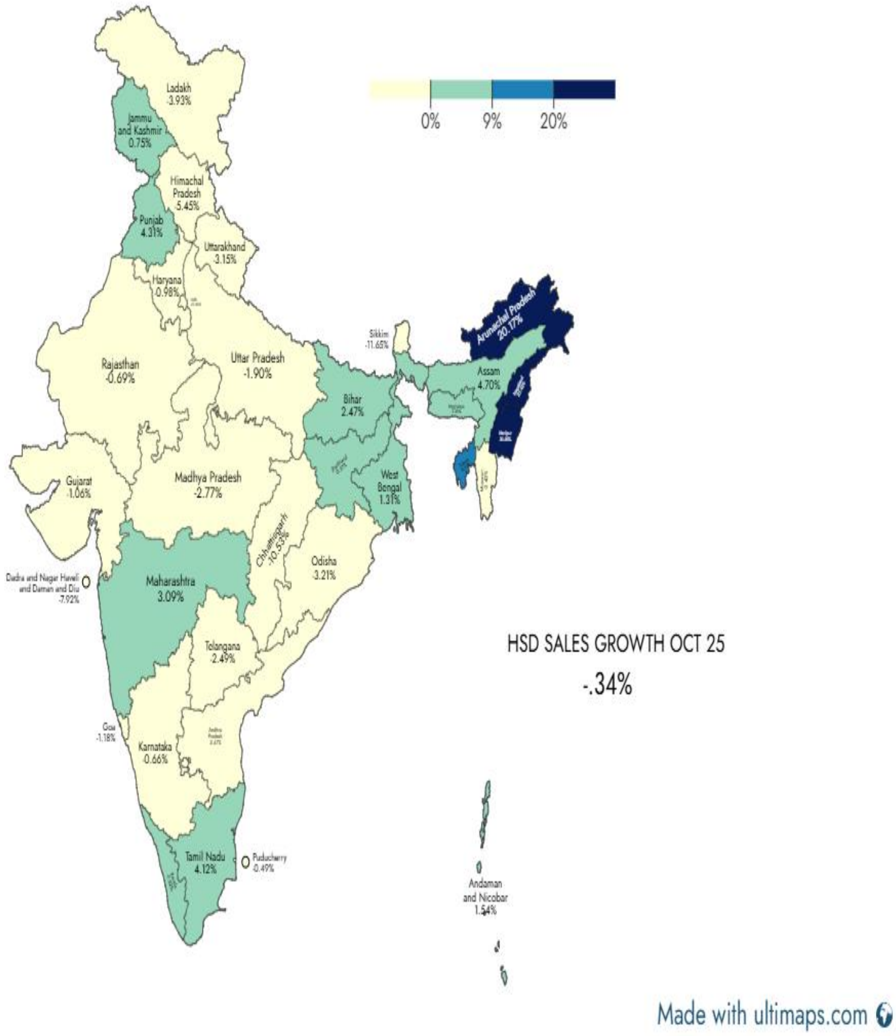
- High Speed Diesel (HSD) consumption in October 2025 registered a slight year-on-year decline of 0.30%, mainly attributed to prolonged monsoon rains and elevated consumption levels last year that set a high historical base.

- Above-average national growth has been observed in states such as Punjab reflecting start of sowing Season, Bihar on account of election activities , and Maharastra due to Vat increase in Karnataka .

- Cyclonic Storm Montha at the end of October 2025 severely disrupted vehicle mobility across the southern states of Andhra Pradesh, Telangana and Odisha due to government-imposed bans, flooding, and infrastructure damage.

- Increased GSTN & e-way bills also point towards increased freight activity coupled with higher rural consumption.

Figure-E: State Wise Growth in HSD month of Oct-25



Pan India based domestic HSD monthly consumption since Apr-22 is shown in the Fig-F. HSD market share in direct and retail sales is shown in the Fig-G.

Figure-F: Month-wise HSD consumption (MMT) since April 2022

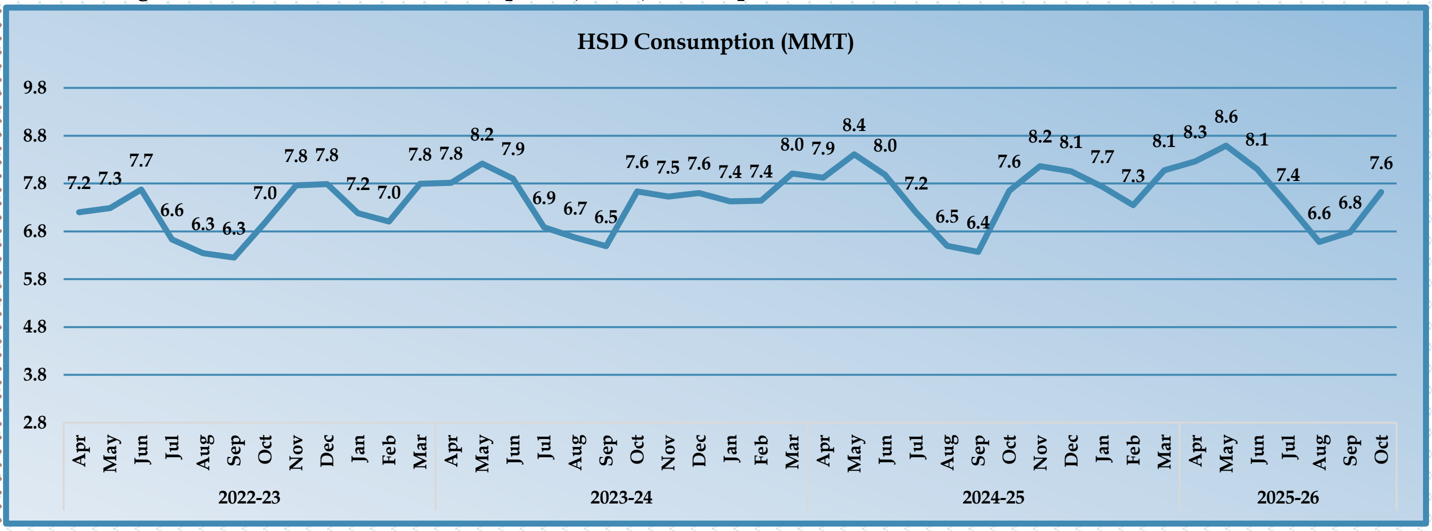
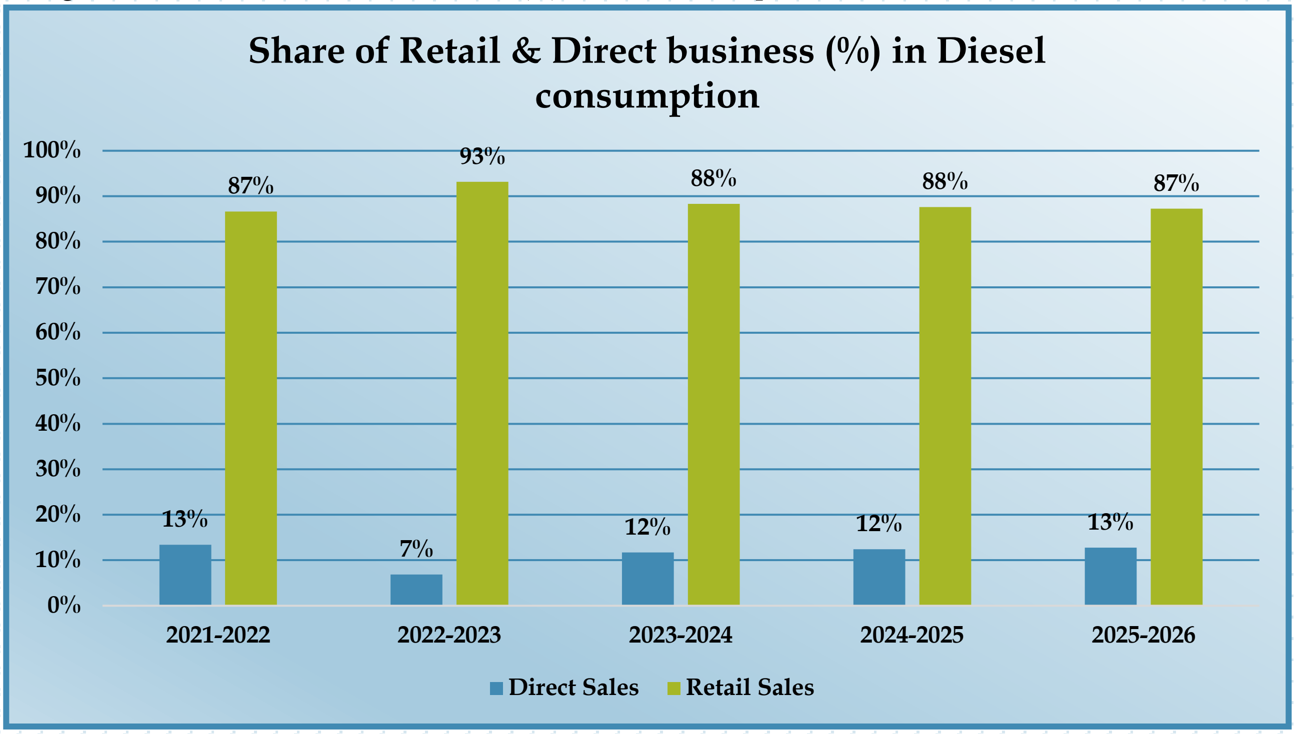


Figure-G: **Share of Retail & Direct business (%) in Diesel consumption**



Factors impacting consumption of HSD:

Weather

- **Northern India**: Rain may continue in the first week as withdrawal lags. Hilly areas (Himalayas) could face flooding due to western disturbance.
- **Eastern & Northeastern India**: Expect widespread rain, possibly even heavier than recent months, helping relieve seasonal moisture deficits.
- **Central India** Extended monsoon influence may boost soil moisture and water reservoirs, delaying the dry-down.
- **Northwestern India**: Rainfall from western disturbances could lead to a surge in precipitation early in the month, but activity may taper later.
- **Southern Peninsula**: The northeast monsoon (NEM) could start strongly in parts. Coastal and peninsular regions may see heavy showers and possibly unseasonal rain systems.

Overall Summary: October 2025 is projected to be **wetter than usual**, with most parts of India seeing **normal to above-normal rainfall**. The lingering southwest monsoon withdrawal and onset of post-monsoon systems will delay the dry season, increasing flood risk in some areas. Temperatures are expected to be moderate, with warmer nights, especially in eastern and northeastern India.

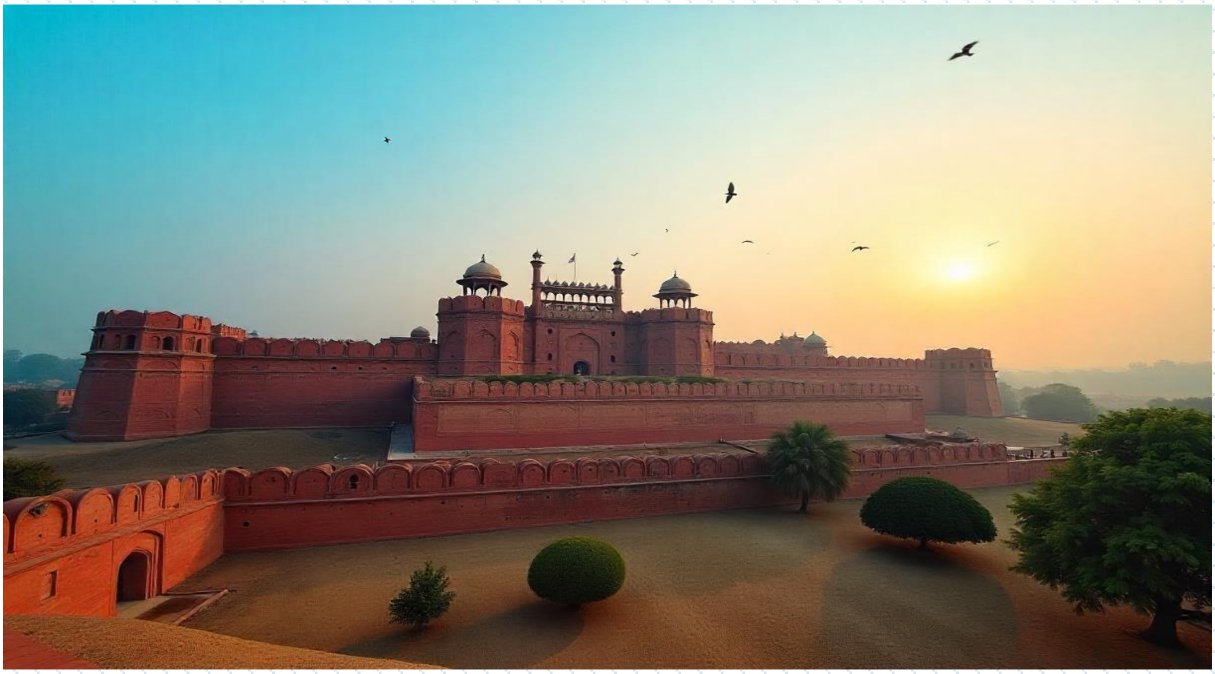


Figure- H: State wise Rainfall Map for Oct 25. (Source : Indian Metreological Department)

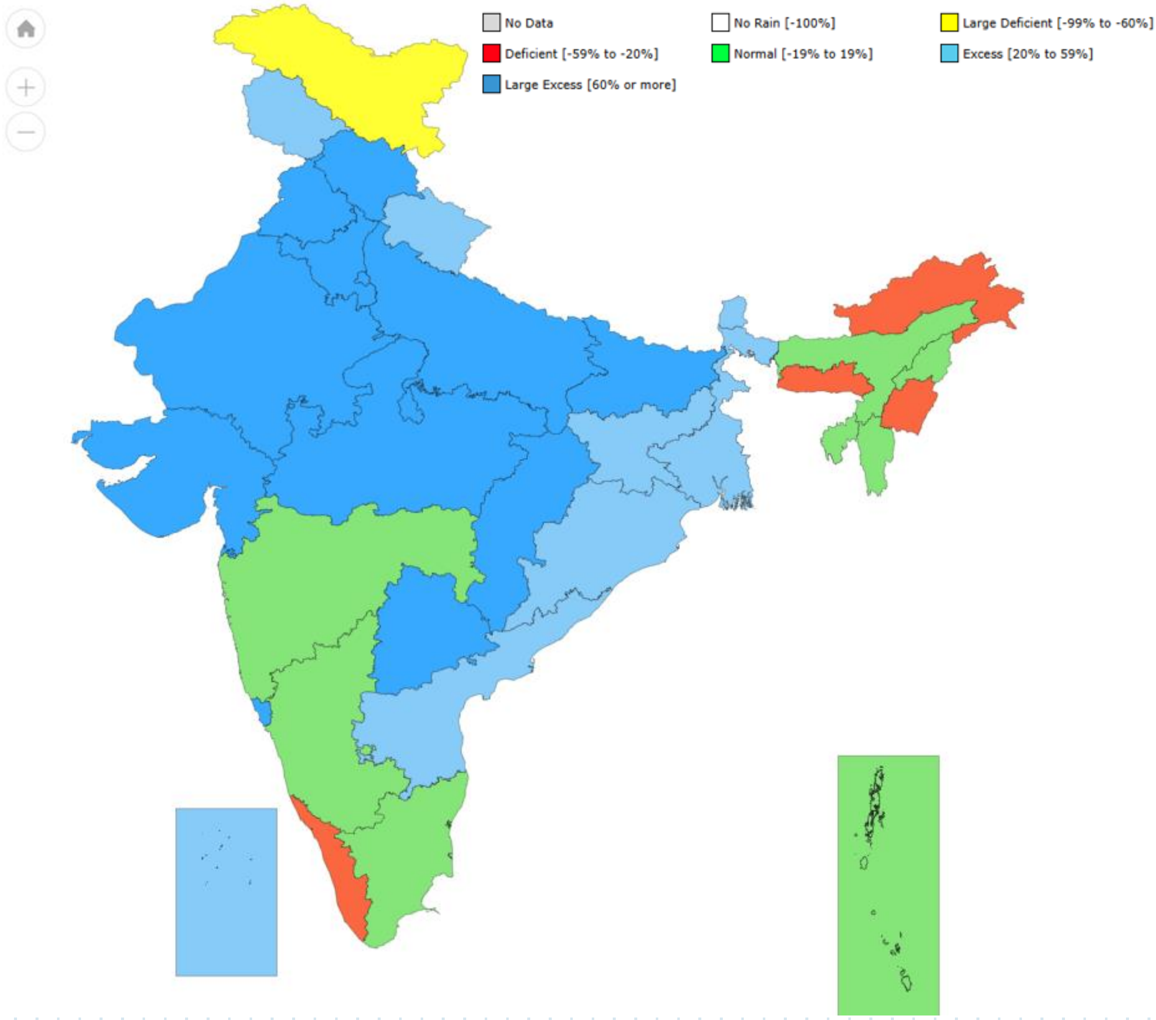


Table-4 Details of the Total E-Way Generated in CY vis-a-vis LY :

(No of Eway Bills Generated in Lakhs)

Month	Oct-25	Oct-24	Variance	Apr-Oct 25	Apr-Oct 24	Growth
Intra State	845.37	744.59	14%	5,778.41	4,740.13	21.9%
Inter State	423.21	427.92	-1%	3,034.51	2,625.55	15.6%
Total	**1,268.58**	**1,172.51**	**8%**	**8,812.92**	**7,365.68**	**19.6%**

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 2.7% as compared to Oct 2024 as shown in Table-5

Tractor Sale:

Tractor domestic sales in Oct 2025 with a volume of 64,785 registered a robust growth of 3.6% over the volume of 62,527 in Oct 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		**Oct'25**		
		2024	**2025**	**Growth %age**
CV	LCV	56,182	72,948	29.8%
	MCV	5,992	7,177	19.8%
	HCV	29,376	27,685	-5.8%
	Others	85	31	-63.5%
Total CVs		**91,635**	**107,841**	**17.7%**
Tractors		64,416	73,577	14.2%

Source: FADA research

Port Traffic:

The Major Ports achieved cargo throughput of 513.98 MMT during Apr-Oct'2025 which is 6.63% higher over same Period last year.

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

Ports	Apr-Oct'25	Apr-Oct'24	Growth (%)
Kolkata & Haldia	38450	32932	16.76
Paradip	88972	84918	4.77
Visakhapatnam	50007	47891	4.42
Kamarajar (Ennore)	27944	27699	0.88
Chennai	34362	31396	9.45
V.O. Chidambaranar	25229	24563	2.71
Cochin	21766	21322	2.08
New Mangalore	27162	25052	8.42
Mormugao	11072	9618	15.12
Mumbai	42349	40879	3.60
JNPA	58133	52422	10.89
Deendayal	88534	83316	6.26
Total:	**513980**	**482008**	**6.63**

POWER SITUATION:

India's peak demand for power degrew marginally to 242.49 gigawatt (GW) in Apr-Oct'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-Oct'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-Oct 2025)

Year	Energy				Peak			
	Requirement	Availability	Surplus(+)/Defcits(-)		Peak Demand	Peak Met	Surplus(+) / Defcits(-)	
	(MU)	(MU)	(MU)	(%)	(MW)	(MW)	(MW)	(%)
2021-22	821,030	817,204	-3,826	-0.5%	203,014	200,539	-2,475	-1.2%
2022-23	905,443	899,950	-5,493	-0.6%	215,888	207,231	-8,657	-4.0%
2023-24	982,233	979,345	-2,888	-0.3%	243,271	239,931	-3,340	-1.4%
2024-25	1,028,850	1,027,589	-1,261	-0.1%	249,856	249,854	-2	0.0%
2025-26	1,026,068	1,025,766	-302	0.0%	242,773	242,493	-280	-0.1%

SECTORAL CONSUMPTION OF HSD:

During 'Apr-Oct-25, HSD total consumption with a volume of 53.31 MMT registered 2.5%growth Year-on Year basis over the volume of 52.03 MMT in 'Apr-Oct-24.

87% of HSD consumption during 'Apr-Oct-**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-Oct-**24**' also after direct sales volume recovering back.

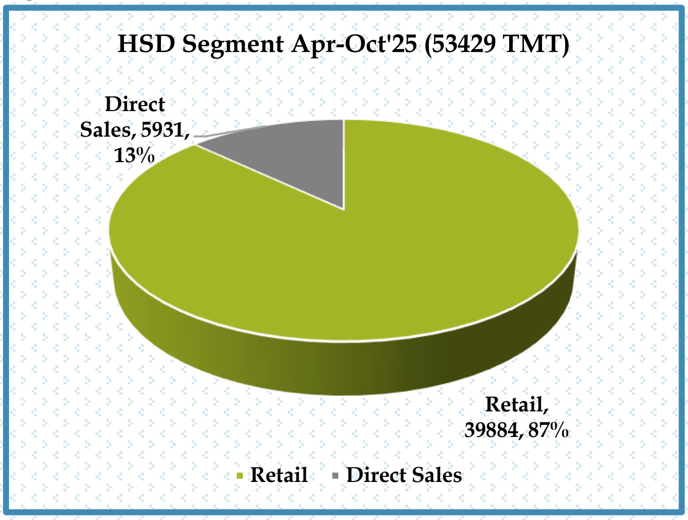
Growth of 2.5% during Apr-Oct'25 was driven by increased economic activity & freight movement, evident by a 19 % jump in Total E-way bill statistics.

In direct sales category, the sectoral consumption break up is shown in I(II) figure. i.e., for Apr-Oct-25' 'Road Transport' was 20%, the highest share followed by Mining 12%, Manufacturing at 12%, Shipping 6%, Agriculture 3% 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 & shipping reduced from 22% 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-Oct'25 *a*nd its comparison with Apr-Oct'24



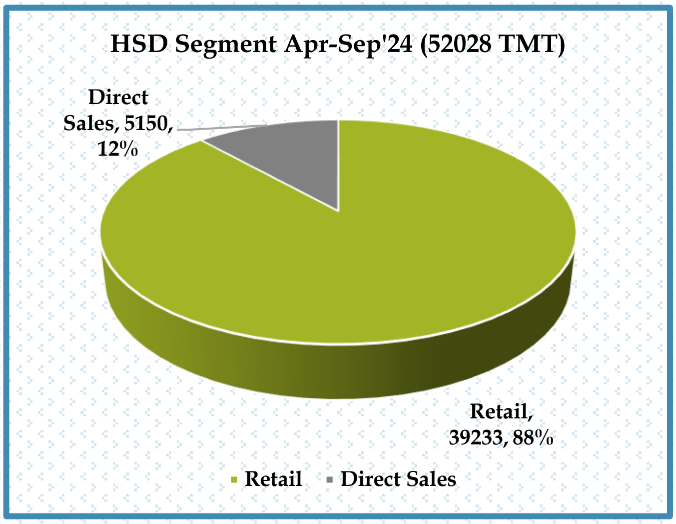
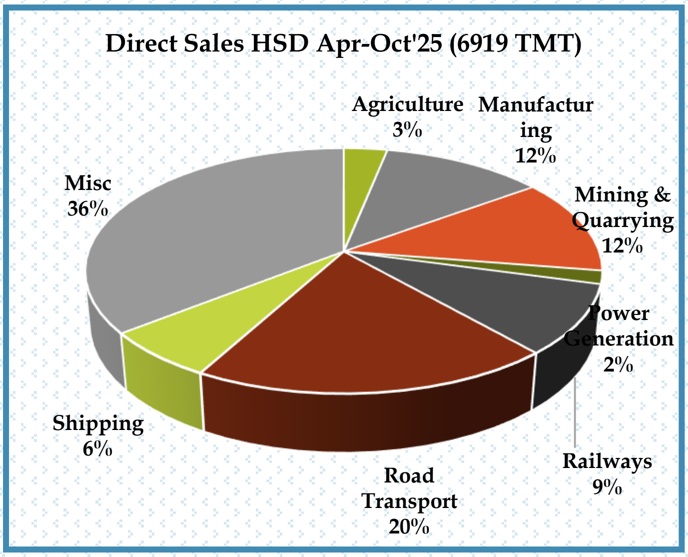
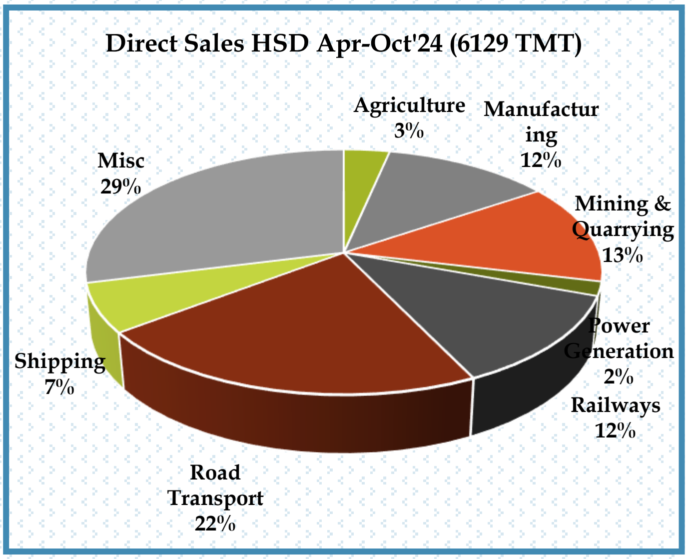


Figure-I(II): Sectoral HSD consumption Breakup in Apr-Oct'25 *a*nd its comparison with Apr-Oct'24





Share of Manufacturing has stagnated at 12% owing to weaker demand from the Cement & Metal industry in the Direct Sales segment. Share of Mining sector decreased to 12%. Misc includes Cement Industry, Iron & Steel, Civil Engg, Chemicals & Allied, mechanical, Aluminium, Elec/Electronics, Fertlizers, Textiles, Ceremic & glass & other Misc Consumer/Industrials goods.

Kerosene:

Kerosene (SKO) consumption with a volume of 0.04 MMT registered a growth of 32.8% in Oct 2025 as compared to Oct 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 & Uttrakhand have nil allocation this financial year.

The market share of subsidized-PDS and other SKO was 51% & 49% respectively for the month Oct 2025 as shown in the following figure-J.

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

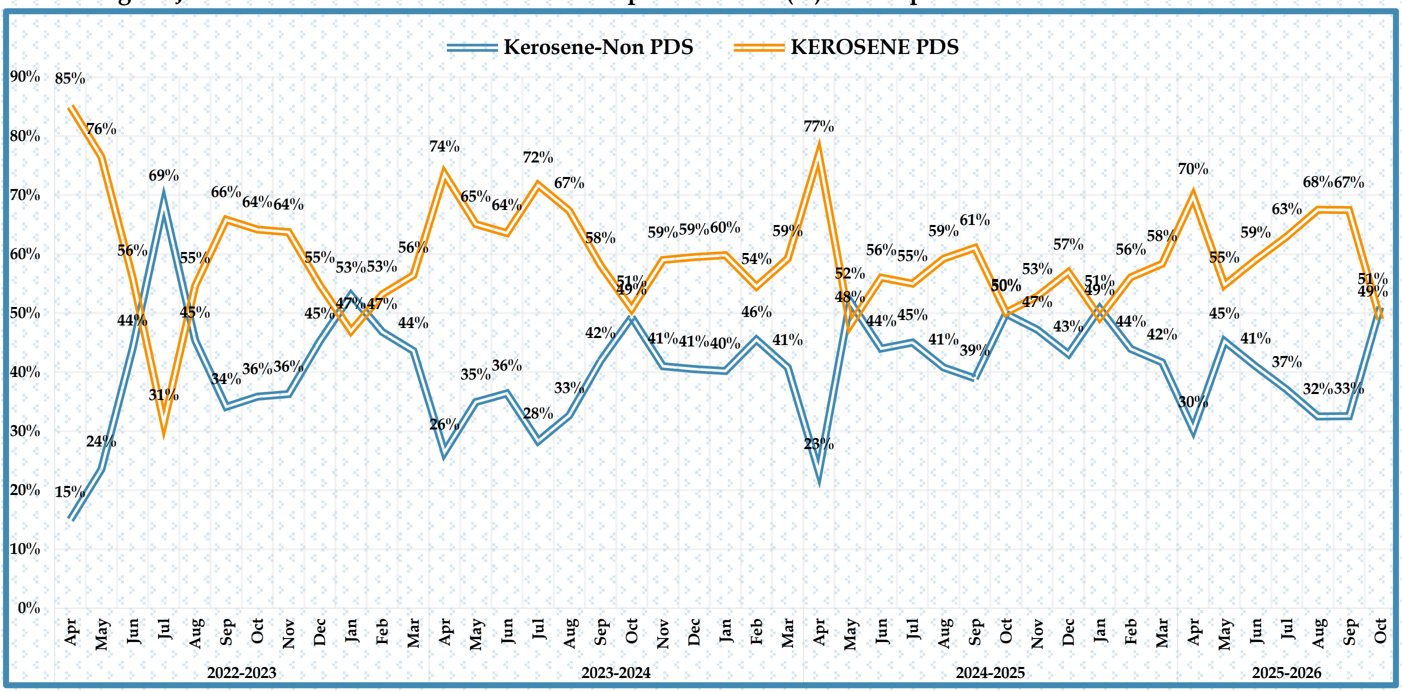
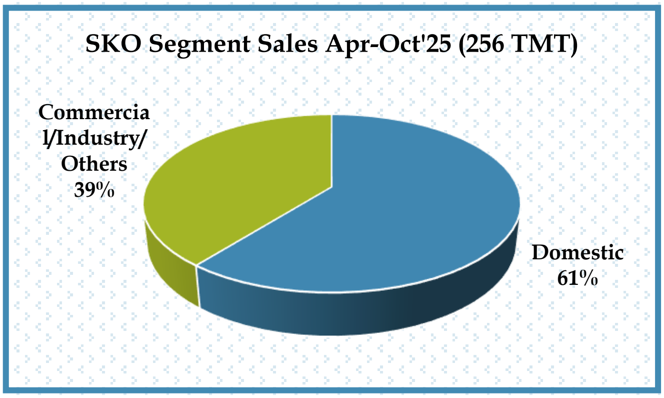
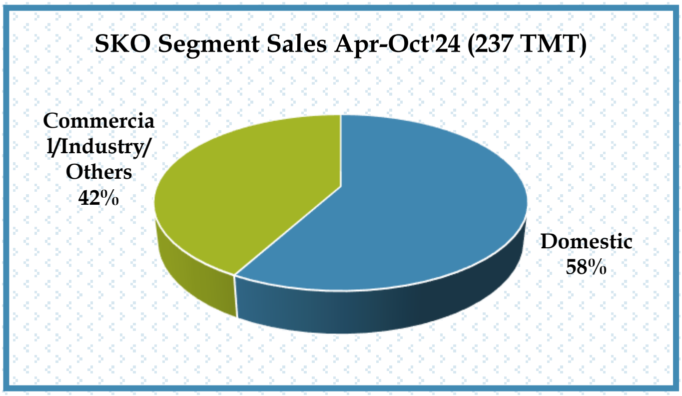


Figure-K: *Other SKO: non-subsidized PDS SKO +non-PDS kerosene





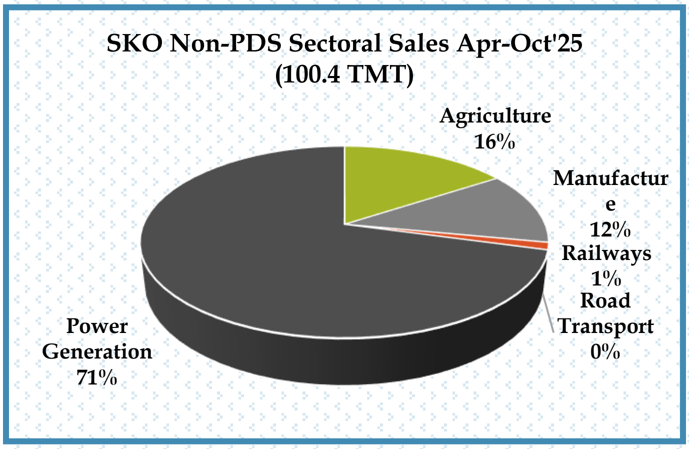
Sectoral consumption of SKO:

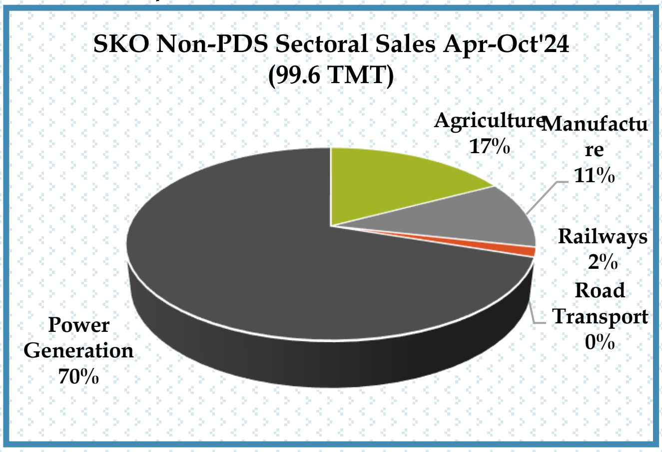
Out of total SKO sales during 'Apr-Oct'25 'PDS subsidized SKO' upliftment constituted to 61%. So far as sales in 'Other SKO' is concerned,' agriculture accounted for 16% share, Manufacturing 12%, and Miscellaneous applications at 71%.

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

***Figure-L:** SKO' sales during 'Apr-Oct'25 and its YoY comparison with 'Apr-Oct'24*



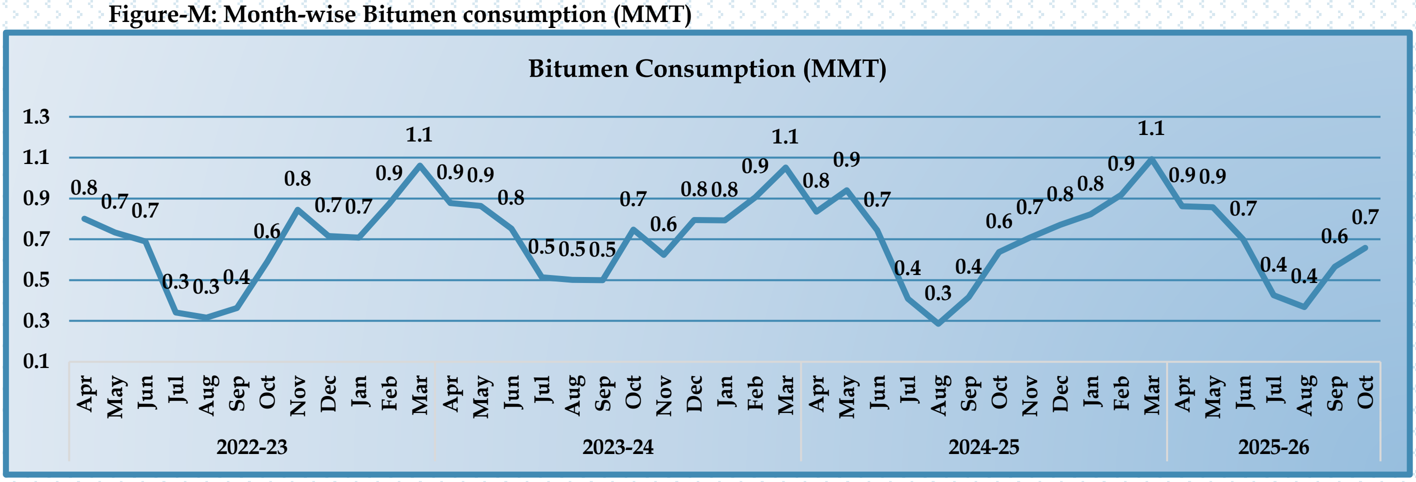


BITUMEN:

Bitumen consumption during Oct 2025 with a volume of 0.66 MMT registered growth of 3.0% over the volume of 0.64 MMT in the month of Oct 2024. Import of Bitumen is also increased by 49% in Oct 25 .

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-Oct-25, total bitumen consumption with a volume of 4.44 MMT registered a growth of 3.9% Year-on Year basis over the volume of 4.27 MMT in 'Apr-Oct-24.

98% of cumulative bitumen sales during 'Apr-Oct-25-FY2025-26', was constituted to Road construction, balance 2% was consumed by miscellaneous industries.

LPG:

LPG consumption during the month of Oct 2025 with a volume of 2.87 MMT registered growth in the month at 5.6% over the volume of 2.72 MMT in the month of Oct 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 86% in Oct 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. 3.1% growth in Packed domestic LPG consumption in Oct'25 as compared to Oct'24.
2. Growth of 11.2% in non-domestic packed segment is due price advance of 19kg cyl in Oct'25 (Rs. 1595.50) as compared to Oct'24 (1740.0).
3. Under PMUY scheme 10.33 crores beneficiaries at the end of Oct 2025.
4. As on 1.11.2025, total active domestic connections in India are 3307.9 lakhs

   Growth in consumption of domestic LPG in Oct`25 compared to Oct`24 are as follows:

   - PMUY growth 11.0% wherein OMCs-wise %growth as contributed by 18.2% (HPC), 9.9% (IOC) & 6.7% (BPCGrowth of 11.2% in non-domestic packed segment is due price advance of 19kg cyl in Oct'25 (Rs. 1595.50) as compared to Oct'24 (1740.0).

   - As of now, more than ~66.1% of non-PMUY consumers have DBCs connections and thus making a positive impact on LPG consumption. New connections ~100% issued with DBCs in Oct'25 (including SBC to DBC conversion).

5. 17.3 Crs cylinders of 14.2kg (~55.8 lacs/day) were delivered in Oct`25 compared to 16.8 Crs in Oct`24.

6. Growth of 38.7% 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 Oct'25 Rs. 70.3/kg as compared to Oct'24 rate was Rs. 74.7/kg.

   - Pan India based domestic LPG monthly consumption is shown in the Fig-O.

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

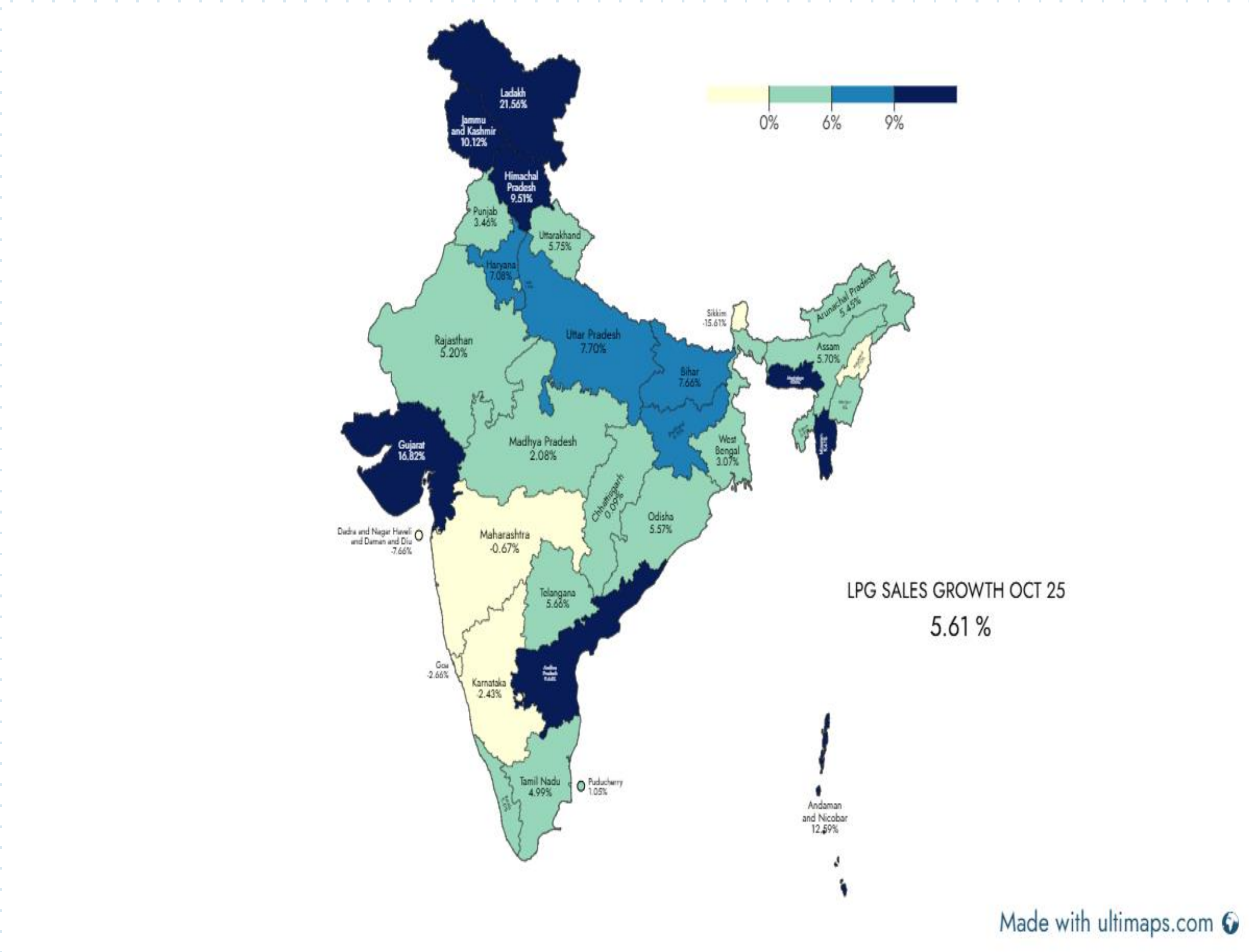
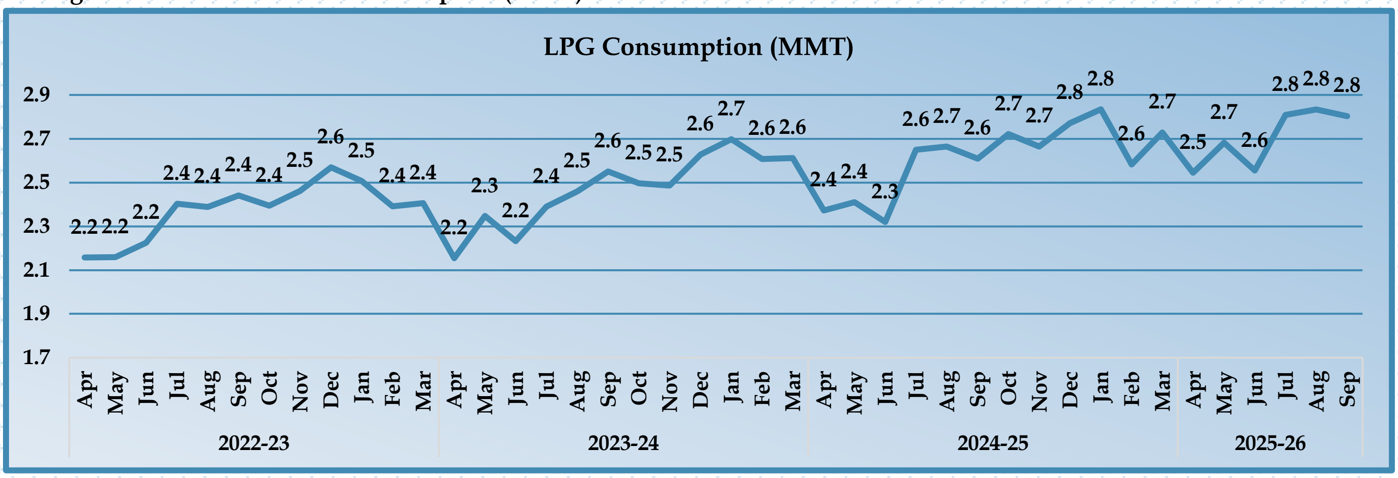


Figure-O: Month-wise LPG consumption (MMT)

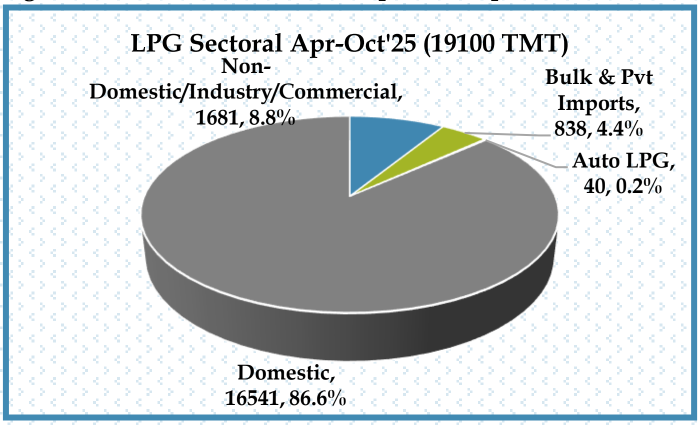


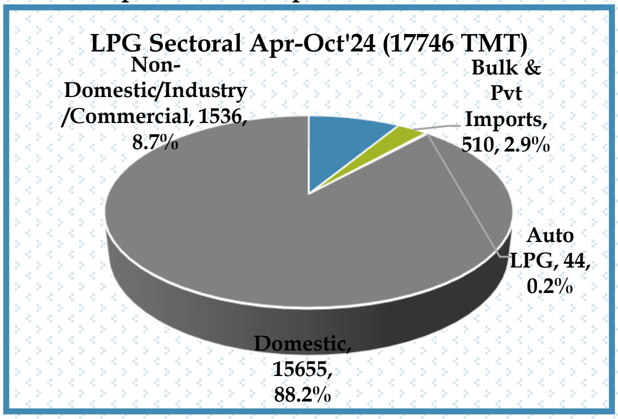
Sectoral consumption of LPG:

During 'Apr-Oct-25, total LPG domestic consumption with a volume of 19.10 MMT registered 7.6% growth Year-on Year basis over the volume of 17.75 MMT in 'Apr-Oct-24.

The Sectoral LPG consumption during 'Apr-Oct-25', was driven by Domestic packed at 86.6%, followed by LPG 'non-domestic/ industry/ commercial sector 8.8% & Bulk at 4.4%. Auto LPG at 0.2% has been on the negative trajectory getting displaced by CNG.

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





Naphtha:

Naphtha consumption during Oct 2025 with a volume of 0.89 MMT registered a de-growth of 23.4%, over a volume of 1.16 MMT during the month of Oct 2024. Petrochemical industries remain the main consumers of naphtha. Naphtha consumption showed a de-growth during the oct 25 due to restricted product availability and reduction in production. Gujarat is major consumption center, contributing 55 % to the total sales of naphtha in the country .

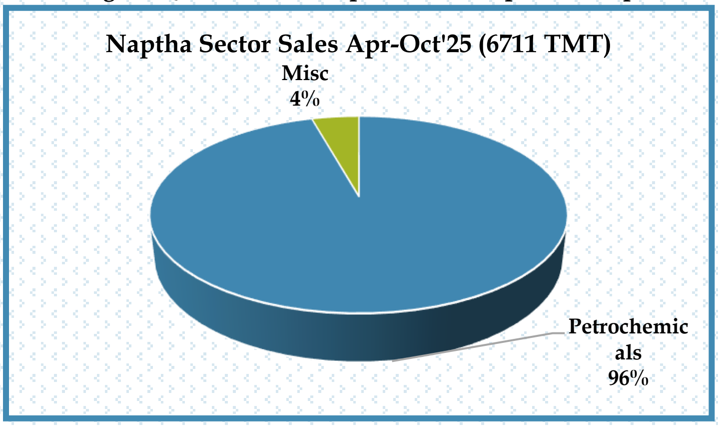
Sectoral consumption of Naphtha:

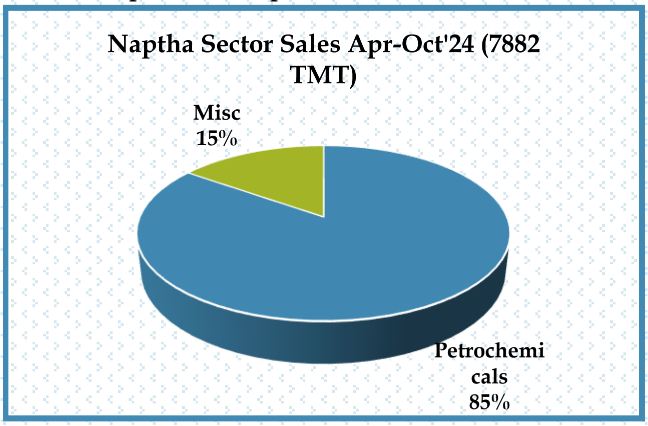
During 'Apr-Oct-25, total Naphtha domestic consumption with a volume of 6.71 MMT registered de-growth of 14.9% Year-on Year basis over the volume of 7.88 MMT in 'Apr-Oct-24.

94% 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-Oct-25 and its comparison to 'Apr-Oct-24





ATF:

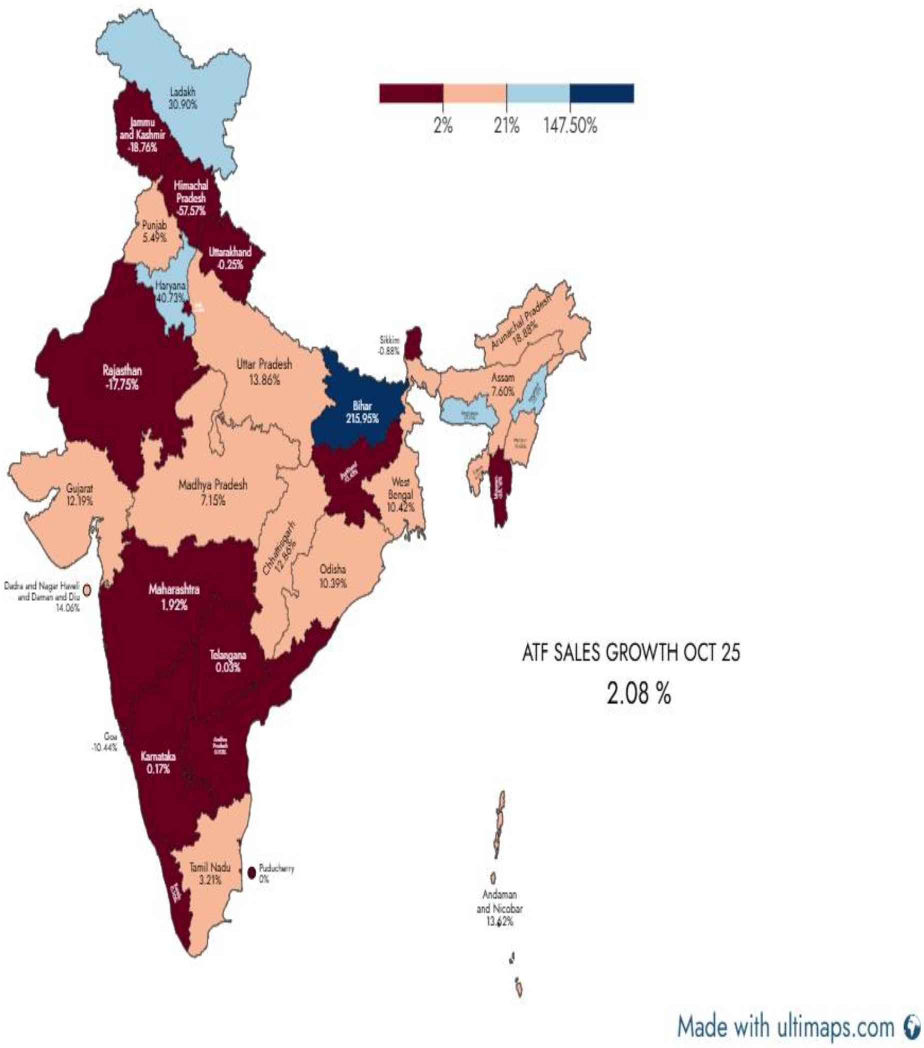
Aviation Turbine Fuel (ATF) consumption in October 2025 registered a growth of 2.1% after remaining negative for last three months.

This uptick was primarily driven by the reopening of Runway at Delhi's Indira Gandhi International Airport after extensive repair works and the festive season surge in travel demand further contributed to this recovery. As per Airports Authority of India data, overall aircraft movements rose by 1.2%, and passenger traffic increased by 2.6% during the April–September 2025 period.

The opening of Hisar Airport has consistently propelled Aviation Turbine Fuel (ATF) demand in the Haryana, registering a 40% increase, while the reduction in VAT on ATF in Bihar has resulted in a remarkable 215% surge in sales in Oct 25 .

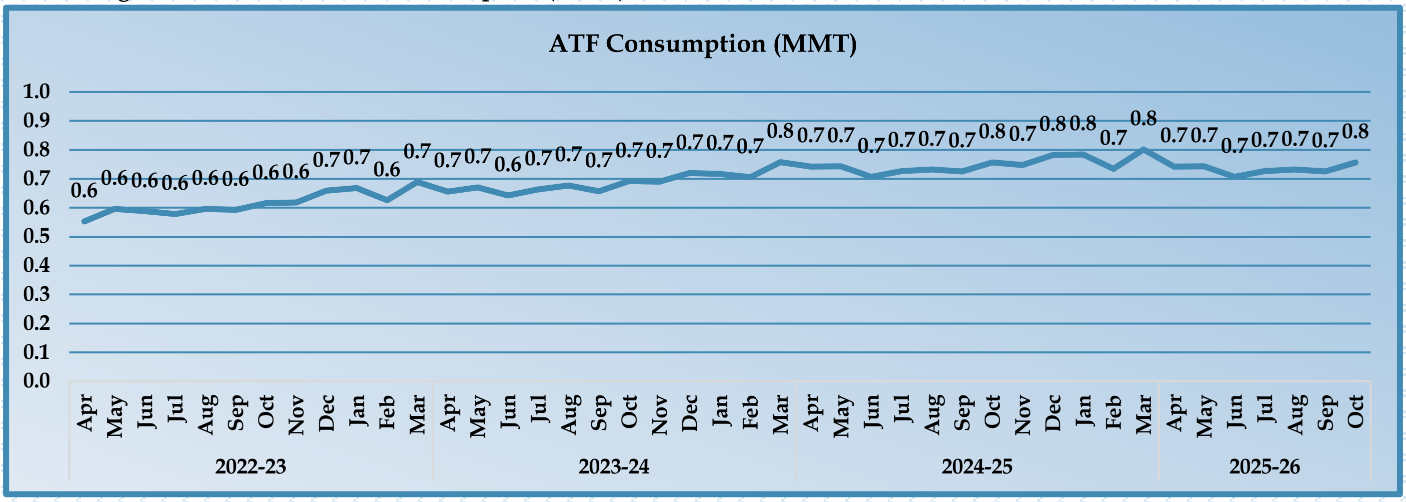
Cyclone Cyclonic Storm Montha at the end of the month. led to the cancellation of all scheduled flights at major airports like Visakhapatnam (Vizag) and Vijayawada on or around October 28, 2025.

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



Pan India based domestic ATF monthly consumption is given in following figure-S.

Figure-S: Month-wise ATF consumption (MMT)



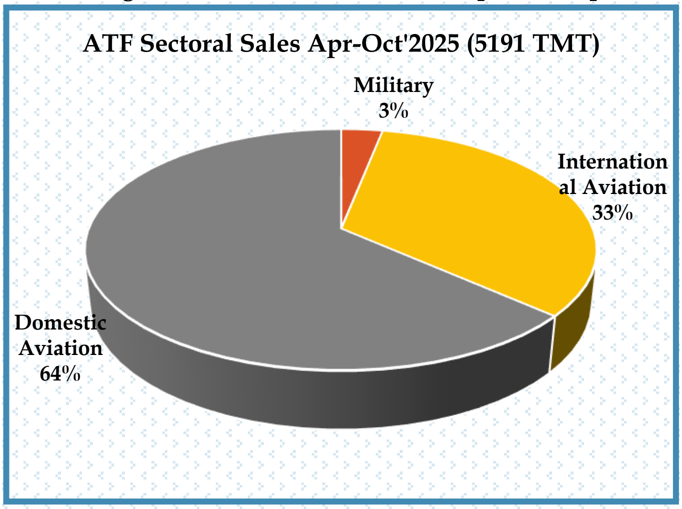
Sectoral consumption of ATF:

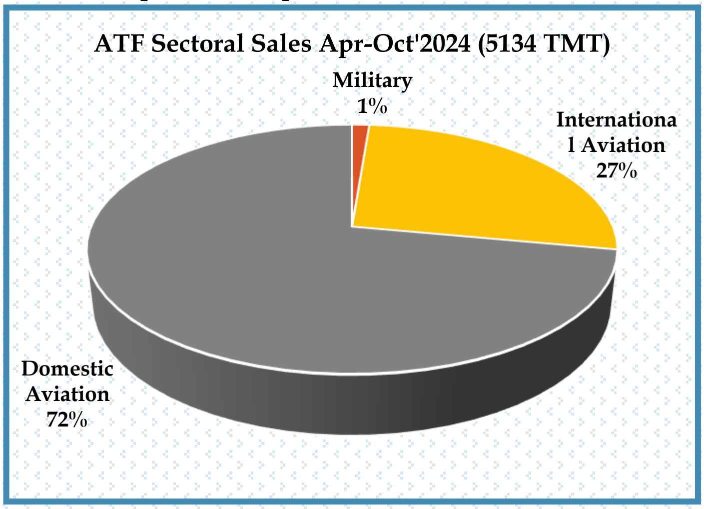
During 'Apr-Oct'25, total ATF domestic consumption with a volume of 5.19 MMT registered 1.1% growth Year-on Year basis over the volume of 5.13 MMT in 'Apr-Oct-24.

Almost entire ATF consumption during 'Apr-Oct-25 was attributed to aviation; 64% domestic aviation, 33% international aviation & 3% 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-Oct-25 and its comparison to 'Apr-Oct-24





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

During the month of September 2025, all operational airports (taken together) handled 231.01 thousand aircraft movements (excluding General Aviation Movements), 31.96 million passengers and 330.84 thousand tonnes of freight.

The International aircraft movements, domestic aircraft movements and total aircraft movements have increased by 6.0%, 0.4% and 1.3% respectively during (April- September) 2025-26 as compared to (April-September) 2024-25.

The International passengers traffic, domestic passengers and total passenger traffic have increased by 6.9%, 1.6% and 2.6% respectively during the period (April- September) 2025-26 as compared to (April- September) 2024 25.

The International freight traffic, domestic freight and total freight traffic have increased by 4.1%, 5.9% and 4.8% respectively during the period (April- September) 2025-26 as compared to (April- September) 2024-25.

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

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

CATEGORY	Sep		%
	2025-26	2024-25	CHANGE
Aircraft Movements (in '000)			
International	39.54	37.92	4.3
Domestic	191.47	196.72	-2.7
Total	231.01	234.64	-1.5
General Aviation	28.4	20.11	41.2
Grand Total(INTL+DOM+Gen)	**259.41**	**254.75**	**1.8**

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:

REGION WISE TRENDS IN AIR TRAFFIC vis-à-vis ATF Consumption								
Sep								
REGION	Sep		Change	REGION	Sep		Change	Difference
	2025-2026	2024-2025			2025-2026	2024-2025		
AIRCRAFT MOVEMENTS (IN NOS)				ATF CONSUMPTION (IN TMT)				
EASTERN	24275	23651	2.6%	EASTERN	52	44	18.7%	-16.0%
NORTH EAST	7575	8146	-7.0%	NORTH EAST	15	13	15.8%	-22.8%
NORTHERN	48116	52691	-8.7%	NORTHERN	258	275	-6.1%	-2.6%
SOUTHERN	60878	60554	0.5%	SOUTHERN	221	218	1.2%	-0.7%
WESTERN	50626	51675	-2.0%	WESTERN	174	176	-1.1%	-0.9%
Total	**191470**	**196717**	**-2.7%**	**Total**	**720**	**726**	**-0.8%**	**-1.8%**

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 Oct 2025 with a volume of 0.585 MMT with a de-growth of 7.4% over the volume of 0.638 MMT in Oct-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.
- The Shipping sector was the major sector for the product with the highest share of 29% is also de growing during the Apr-Oct 25 period
- Mining and Power Sector sector shown healthy growth for FO/LSHS in the month of Oct 25 .

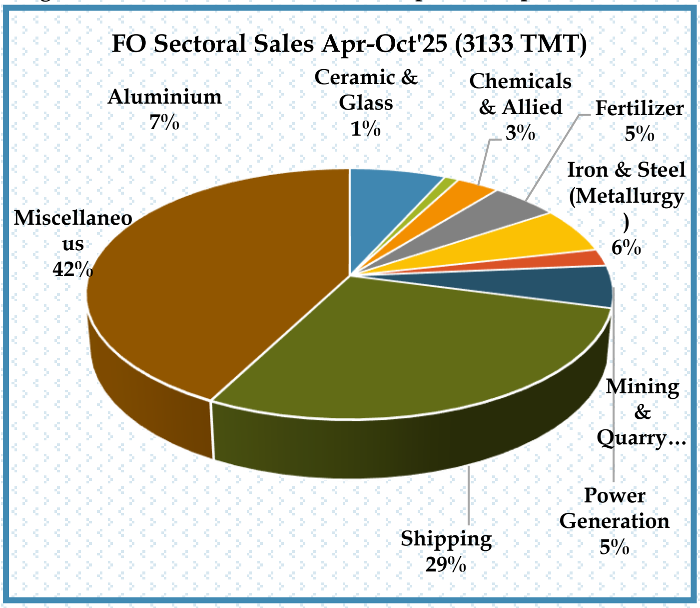
Sectoral consumption of FO/LSHS:

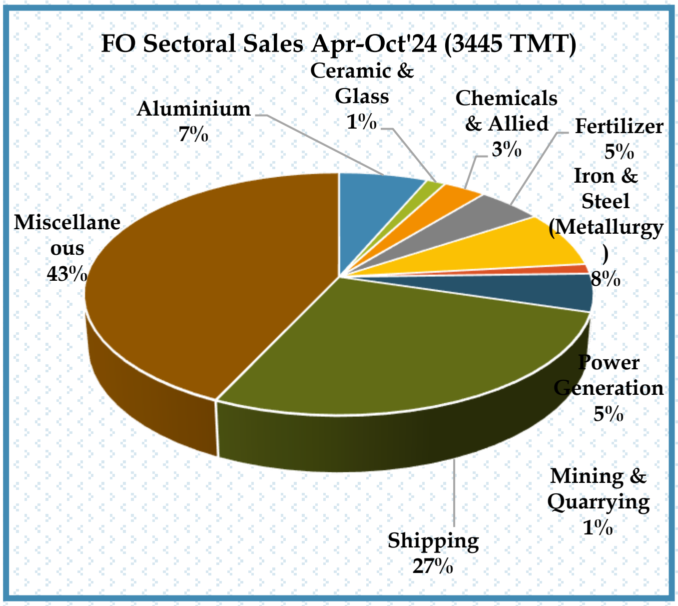
During 'Apr-Oct'25, total FO/LSHS consumption with a volume of 3.60 MMT with a de-growth of 8.3% Year-on Year basis over the volume of 3.93 MMT in 'Apr-Oct'24.

Further Product wise consumption for FO Apr-Oct'25 was 3.1 MMT vs 3.4 MMT in Apr-Oct'24 (9.4% de-growth). For LSHS, Apr-Oct'25 was 0.41 TMT vs 0.48 TMT in Apr–Oct'24 (13.7% De-growth)

Details YoY comparisons are pictorially presented in the following figure.

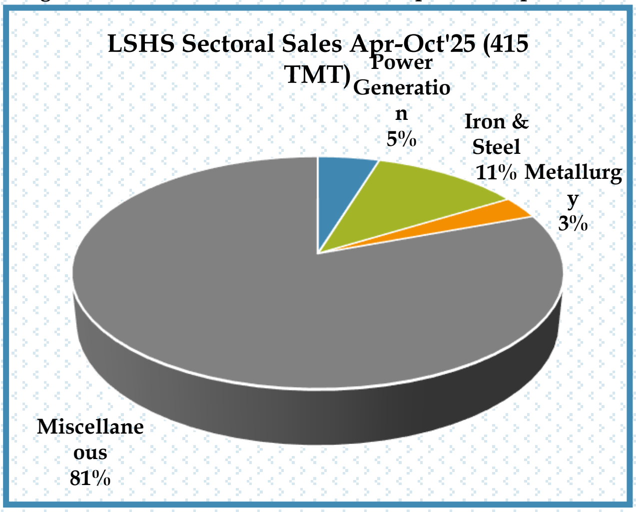
Figure-U: Sector wise FO+LSHS consumption of 'Apr-Oct'25 and its comparison to 'Apr-Oct'24

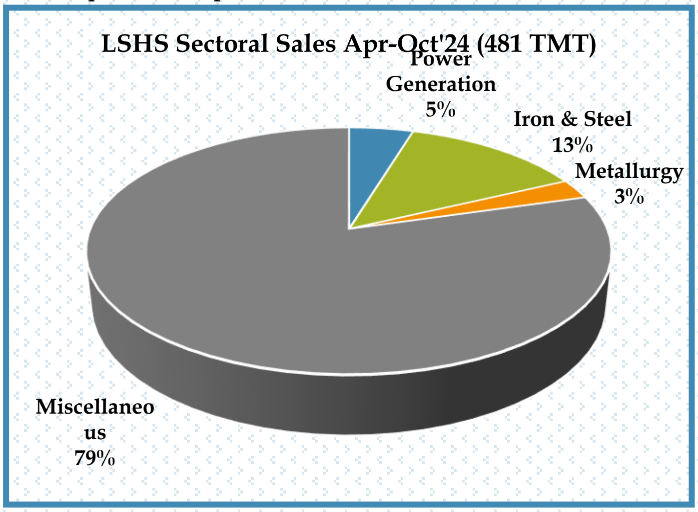




Apr-Oct'25:-	Apr-Oct'24:-
Shipping sector has a share of 29%, up from 27% from previous period, follow by Iron & steel, fertilizer and Aluminium.	Shipping contributes the highest share with 27% followed by Iron & Steel, Aluminiun Glass, Fertlizer & Power generation.

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





Apr-Oct'25:-	Apr-Oct'24:-
Iron & Steel sector contributed to be the largest sector at 11%, followed by Power Generation 5%	Iron & steel contributes the highest share with 13% followed by Power generation & Metallurgy

Petcoke:

Petcoke consumption during the month of Oct 2025 with a volume of 1.75 MMT and de growth of 14.1% over the volume of 2.03 MMT in the same period last year. Significant growth of 20 % % in import of pet coke in Oct 25 which is one biggest growth driver of Pet coke . 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.

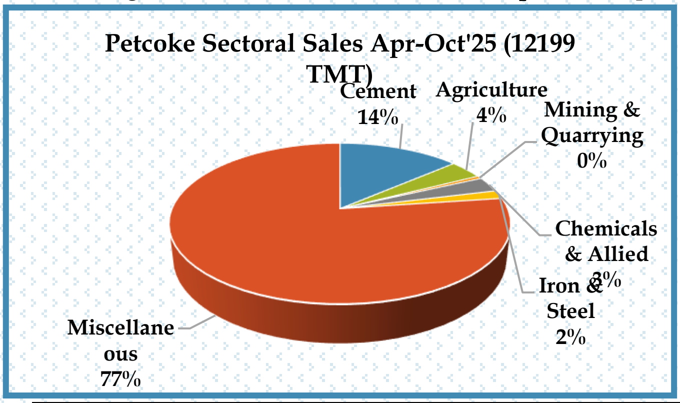
Various factors attributing to Petcoke consumption trend are listed here:-Despite growth in import of Pet coke , consumption experienced de-growth in October 2025 mainly due to consumption for gasification, a slowdown in industrial activity, weaker demand in key consuming sectors like cement, and competitive pricing of alternative fuels like coal that incentivized switching away from pet coke. Imported Petcoke figures are available on actual upto August'25 and prorated for Sept-Oct'25.

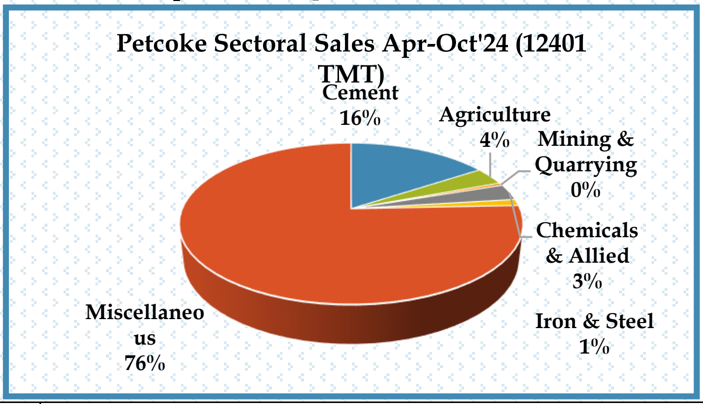
Sectoral consumption of Petcoke:

During 'Apr-Oct-25', total petcoke cummulative domestic consumption with a volume of 12.20 MMT registered 1.6% de-growth Year-on Year basis over the volume of 12.40 MMT in 'Apr-Oct-24'. The cement sector continues to occupy the largest share in 'Apr-Oct-25' (P) at 14% followed by other Industries.

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

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





Apr-Oct'25:- Cement industry occupied the highest share at 14%	**Apr-Oct'24**:- Cement industry occupied the highest share at 16%, followed by other sectors.

Light Diesel Oil

LDO consumption during the month Oct 2025 with a volume of 75 TMT registered a 9% growth over the volume of 69 TMT in Oct 2024.

Oct 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 Oct 25 . LDO consumption in the power sector is primarily associated with initial light-ups of the power plant.

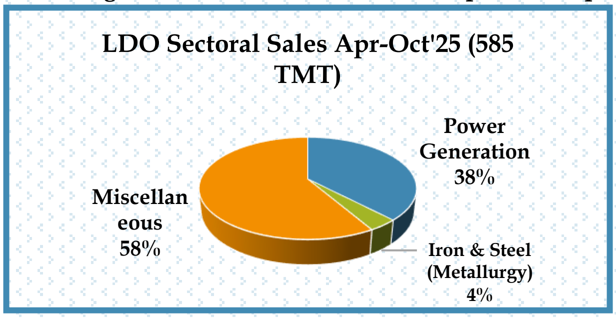
Sectoral consumption of Light Diesel Oil:

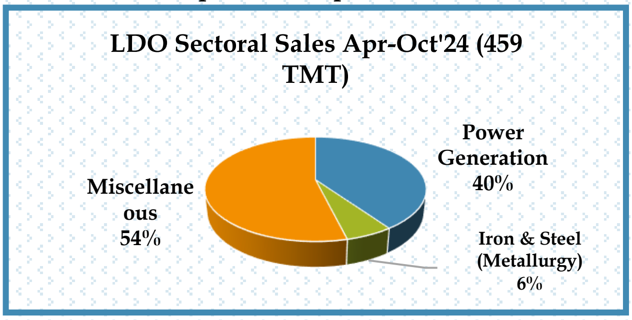
During 'Apr-Oct-25, total LDO domestic consumption with a volume of 0.59 MMT registered a 27.2% growth Year-on Year basis over the volume of 0.46 MMT in 'Apr-Oct-24.

The cumulative consumption of Light Diesel oil (LDO) during 'Apr-Oct'25' was driven by 'Power Generation' 38% followed by Iron & Steel at 4%.

Detailed comparisons are pictorially presented in the following figure

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





Apr-Oct'25:-Power Generation occupied a 38% share for the produc followed by Iron & Steel & Misc industries	**Apr-Oct'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.

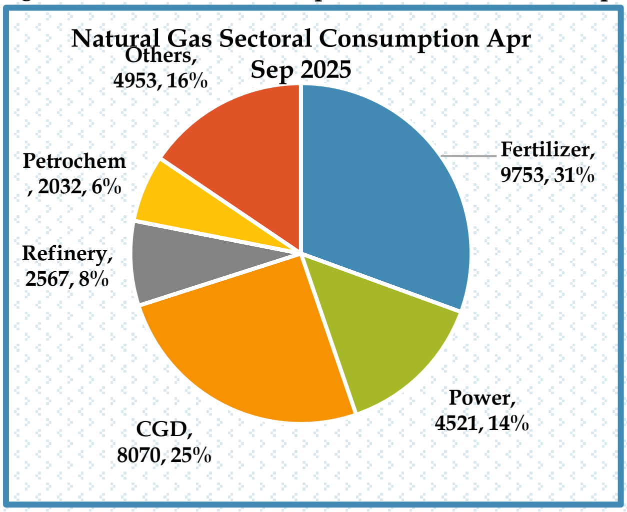
Total Natural Gas Consumption (including internal consumption) for the month of October 2025 (P) was 5722 MMSCM which was 14.6% lower than the corresponding month of the previous year. The cumulative consumption of 40068 MMSCM for the current financial year till October 2025 was lower by 8.1% compared with the corresponding period of the previous year.

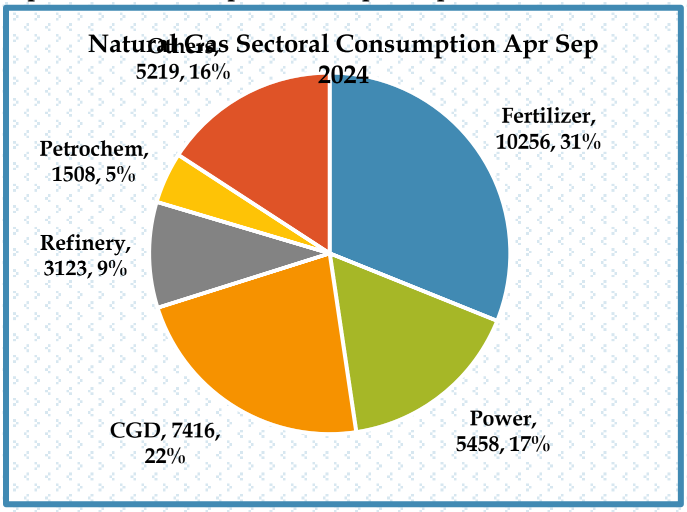
Sectoral consumption of Natural Gas consumption of 'Apr-Sep'25'& its comparison to 'Apr-Sep'24: (PROVISIONAL)

During Apr-Sep25, total Natural Gas monthly domestic consumption with a volume of 31,898 MMSCM, over the volume of 32,979 MMSCM during the same period in the preceeding year

During Apr-Sep'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-Sep2025.

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





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

P: provisional

Apr-Sep'2025	*Apr-Sep'2024*
Fertilizer sector occupied the highest share for the Consumption of Natural Gas at 31% with the share of CGD increasing steadily.	Fertlizer 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-Octoberber 2025-26			October								
	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
(A) Sensitive Products												
LPG	17746	19100	7.6	2481	2394	2496	2721	2873	15.8	20.0	15.1	5.6
SKO	237	256	7.6	125	34	34	33	43	-65.3	28.7	28.4	32.8
Sub Total	**17983**	**19356**	**7.6**	**2606**	**2428**	**2529**	**2753**	**2917**	**11.9**	**20.1**	**15.3**	**5.9**
(B) Major Decontrolled Product												
HSD	52028	53306	2.5	6616	6986	7634	7645	7619	15.2	9.1	-0.2	-0.3
MS	23262	24855	6.8	2750	2996	3140	3412	3665	33.3	22.3	16.7	7.4
Naphtha	7882	6711	-14.9	1180	861	1188	1164	892	-24.4	3.7	-24.9	-23.4
ATF	5134	5191	1.1	479	616	692	757	773	61.4	25.5	11.7	2.1
Bitumen	4268	4435	3.9	660	590	747	638	657	-0.3	11.4	-12.0	3.0
FO & LSHS	3927	3600	-8.3	559	592	525	631	585	4.6	-1.3	11.5	-7.4
Lubricants & Greases	2669	2675	0.2	458	355	320	346	362	-21.0	2.1	13.2	4.7
LDO	459	585	27.2	90	66	67	69	75	-15.7	14.0	12.2	9.1
Sub Total	**99629**	**101356**	**1.7**	**12792**	**13062**	**14313**	**14663**	**14628**	**14.4**	**12.0**	**2.2**	**-0.2**
Sub - Total (A) + (B)	**117612**	**120712**	**2.6**	**15397**	**15490**	**16843**	**17416**	**17545**	**13.9**	**13.3**	**4.2**	**0.7**
(C) Other Minor Decontrolled Products												
Petroleum coke	12401	12199	-1.6	1202	1722	1643	2035	1749	45.5	1.5	6.5	-14.1
Others	7335	6046	-17.6	978	1367	980	803	874	-10.6	-36.0	-10.8	8.8
Sub Total	**19736**	**18245**	**-7.6**	**2180**	**3089**	**2622**	**2838**	**2623**	20.3	-15.1	0.0	-7.6
Total	**137347**	**138958**	**1.2**	**17577**	**18579**	**19465**	**20254**	**20168**	**14.7**	**8.6**	**3.6**	**-0.4**

*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-Octoberber 2025-26			October								
	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
(A) Sensitive Products												
LPG	0.96	1.04	7.6%	0.93	0.90	0.93	1.02	1.08	15.8%	20.0%	15.1%	5.6%
SKO	0.01	0.0097	7.6%	0.03	0.01	0.01	0.01	0.01	-65.3%	28.7%	28.4%	32.8%
Sub Total	**1.0**	**1.0**	**7.6%**	**1.0**	**0.9**	**0.9**	**1.0**	**1.1**	**13.1%**	**20.1%**	**15.3%**	**5.8%**
(B) Major Decontrolled Product												
HSD	1.85	1.90	2.5%	1.62	1.71	1.87	1.88	1.87	15.2%	9.1%	-0.2%	-0.3%
MS	0.97	1.03	6.8%	0.79	0.86	0.90	0.98	1.05	33.3%	22.3%	16.7%	7.4%
Naphtha	0.32	0.27	-14.9%	0.33	0.24	0.33	0.33	0.25	-24.4%	3.7%	-24.9%	-23.4%
ATF	0.19	0.20	1.1%	0.13	0.16	0.18	0.20	0.20	61.4%	25.5%	11.7%	2.1%
Bitumen	0.12	0.13	3.9%	0.13	0.12	0.15	0.12	0.13	-0.3%	11.4%	-12.0%	3.0%
FO & LSHS	0.12	0.11	-8.3%	0.12	0.13	0.11	0.14	0.13	4.6%	-1.3%	11.5%	-7.4%
Lubricants & Greases	0.09	0.09	0.2%	0.11	0.08	0.07	0.08	0.08	-21.0%	2.1%	13.2%	4.7%
LDO	0.02	0.02	27.2%	0.02	0.02	0.02	0.02	0.02	-15.7%	14.0%	12.2%	9.1%
Sub Total	**3.7**	**3.7**	**1.8%**	**3.2**	**3.3**	**3.6**	**3.7**	**3.7**	**14.9%**	**12.4%**	**2.5%**	**-0.2%**
Sub - Total (A) + (B)	**4.7**	**4.8**	**3.0%**	**4.2**	**4.2**	**4.6**	**4.8**	**4.8**	**14.5%**	**14.1%**	**5.1%**	**1.1%**
(C) Other Minor Decontrolled Products												
Petroleum coke	0.32	0.31	-1.6%	0.21	0.31	0.29	0.36	0.31	45.5%	1.5%	6.5%	-14.1%
Others	0.28	0.23	-17.6%	0.25	0.36	0.25	0.21	0.23	-10.6%	-36.0%	-10.8%	8.8%
Sub Total	**0.6**	**0.5**	**-9.0%**	**0.5**	**0.7**	**0.5**	**0.6**	**0.5**	**15.0%**	**-18.6%**	**-1.6%**	**-5.7%**
Total	**5.2**	**5.33**	**1.6%**	**4.7**	**4.9**	**5.1**	**5.3**	**5.4**	**14.5%**	**9.6%**	**4.4%**	**0.4%**

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

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