

**INDUSTRY CONSUMPTION REPORT POL & NG**  
**SEP 2025**

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## CIRCULATION:

पेट्रोलियम और प्राकृतिक गैस मंत्रालय:	MoP&NG:
<p>निजी सचिव- माननीय मंत्री - (पेट्रोलियम और प्राकृतिक गैस)  ओ एस डी- माननीय मंत्री - (पेट्रोलियम और प्राकृतिक गैस)  निजी सचिव- माननीय राज्य मंत्री - (पेट्रोलियम और प्राकृतिक गैस)  सचिव, पीएनजी  अपर सचिव, पीएनजी  अपर सचिव एवं वित्त सलाहकार  संयुक्त सचिव (रिफाइनरी व मार्केटिंग)  संयुक्त सचिव (एक्सप्लोरेशन व बायो रिफाइनरी)  संयुक्त सचिव (जीपी)  संयुक्त सचिव (जी)  उप महानिदेशक, (इ एवं एस)  संयुक्त सचिव (आईएफडी)  संयुक्त सचिव (आईसी)</p> <p><b>डी जी एच:</b> महानिदेशक ( डी जी एच )  <b>ओ आई डी बी :</b> सचिव (ओ आई डी बी )  नीति आयोग: सलाहकार (ऊर्जा), नीति आयोग</p> <p><b>उद्योग:</b>  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</p>	<p>PS to Hon'ble Minister (P&amp;NG)  OSD to Hon'ble Minister (P&amp; NG)  PS to Hon'ble Minister of State (P&amp;NG)  Secretary, P&amp;NG  Additional Secretary, P&amp;NG  Additional Secretary &amp; Financial Advisor  Jt. Secretary (Refinery &amp; Marketing)  Jt. Secretary (Exploration &amp; Biorefinery)  Jt. Secretary (GP)  Jt. Secretary (G)  Deputy Director General (E&amp;S)  Jt. Secretary (IFD)  Jt. Secretary (International Cooperation)  <b>DGH:</b> DG, DGH  <b>OIDB:</b> Secretary (OIDB)  <b>NITI Aayog:</b> Advisor (Energy), NITI Aayog  <b>Industry:</b>  Chairman, IOC / ONGC New Delhi  C&amp;MD - BPC / HPC / GAIL  Director (Mkt.), IOC/ BPC / HPC /GAIL  President - RIL, MD &amp; CEO - HMEL, CEO  (Mktg.) - Nayara Energy  DG, FIPI  MD- NRL, Guwahati/ CPCL, Chennai/  MRPL, Mangalore  OMCs Planning &amp; Retail Groups - HO</p>

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

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

The monthly Petroleum Industry Consumption Review Report has been prepared by the Petroleum Planning and Analysis Cell (PPAC) for the month of Sep 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)  
Vijay Kansal  
Additional Director (Demand & Economic Studies)

## Highlights of the month: SEP 2025

- Engineers India Limited has successfully executed the development of India's largest underground rock cavern for LPG storage for Hindustan Petroleum Corporation Limited at Mangalore, Karnataka with Storage capacity of 80000 MT.
- Hon'ble PM inaugurated India's first bamboo-based ethanol plant, a Rs 5,000-crore facility operated by Assam Bio-ethanol Private Limited. The facility will process approximately 500,000 tonnes of bamboo annually to produce 48,900 tonnes of ethanol, contributing substantially to India's 20% ethanol blending program.
- Oil India Limited has announced the discovery of natural gas in the Andaman shallow offshore block, reporting the occurrence in its second exploratory well, Vijayapuram-2, drilled within Offshore Andaman Block AN-OSHP-2018/1, which was awarded under the Open Acreage Licensing Policy (OALP)
- The Shipping Corporation of India (SCI) and OMCs IOCL, BPCL and HPCL have entered into an MoU to collaborate for building and operating a fleet which will be used for international trade as well as coastal movement of petroleum products, petrochemicals and other hydrocarbon cargoes .
- Govt has allowed production of ethanol from sugarcane juice, syrup and all types of molasses "without any restrictions" during the ethanol supply year (ESY) 2025-26 starting Nov .
- CM inaugurates Delhi's first large-scale biogas plant at Nangli Dairy with 200-tonne-per-day (TPD) capacity plant, will treat cattle dung and biodegradable waste into compressed biogas (CBG) and manure.
- The Navi Mumbai International Airport inaugurated by Hon'ble PM will mark a significant milestone for India's aviation sector and is expected to alleviate congestion at CSMIA by diverting a substantial number of both domestic and international flights.
- Megha Engineering & Infrastructures Ltd has secured the landmark mandate to build and operate India's first private-sector strategic petroleum reserve (SPR).
- Hon'ble PM laid the foundation stone of Avaada's 1 560 MWp solar plus 2,500 MWh battery storage (BESS) project at Pugal and inaugurated Avaada's 200 MW (282 MWp) solar power project at Shri Dungargarh, Bikaner.
- The HSBC India Manufacturing PMI for September 2025 was revised down to 57.7 from the preliminary estimate of 58.5, and compared to August's 59.3. The HSBC India Services PMI for September 2025 stood at 60.9, lower than August's 62.9.
- India's goods and services tax (GST) revenues rose 9.1% year-on-year to Rs 1.89 lakh crore in Sep 25.

## SUMMARY OF PRODUCT WISE POL

1. In September 2025, India's petroleum product consumption reached 18.63 million metric tonnes (MMT), marking a 7% increase from 17.41 MMT in September 24.
2. Petrol (MS) consumption for September 2025 was 3.4 MMT (1.01 million barrels per day), reflecting an 8% growth over 3.1 MMT (0.93 mbpd) in September 2024
3. 'Ethanol blending in Petrol was 19.8% during Sep'25 and cumulative ethanol blending during November 2024- September'2025 was 19.2%.
4. The Domestic Sale of Passenger Vehicles in Sep 2025 with a volume of 2.99 lacs registered growth of 5.80% over Sep 2024, as per FADA . The momentum generated in the final days of September is expected to continue into the Deepawali festive season, supported by improved customer sentiment and GST reforms
5. HSD (Diesel) consumption during the month of Sep 2025 with a volume of 6.79 MMT (1.72 mbpd) registered a high growth of 6.7% over the volume of 6.36 MMT (1.62 mbpd) in the month of Sep 2024.
6. LPG consumption during the month of Sep 2025 with a volume of 2.80 MMT registering a growth of 7.4% over the volume of 2.61 MMT in Sep 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 September 2025 was 0.72 MMT, recording a marginal decline of 0.8% from 0.726 MMT in September 2024
8. Bitumen consumption during Sep 2025 with a volume of 0.56 MMT registered a growth of 34.5 % over the volume of 0.41 MMT in the month of Sep 2024.
9. Kerosene (SKO) consumption with a volume of 37 TMT registered a growth of 0.2% in Sep 2025 as compared to Sep 2024. SKO consumption during the month is largely constituted by PDS category with a 67% share.
10. 'Total Natural Gas Consumption (including internal consumption) for the month of September 2025 was 5642 MMSCM which was 1.4% lower than the corresponding month of the previous year. The cumulative consumption of 34265 MMSCM for the current financial year till September 2025 was lower by 7.1% compared with the corresponding period of the previous year.
11. As on 30<sup>th</sup> Sep'2025, number of active LPG domestic connections are 33.07 cr and PMUY connections 10.33 cr

This report analyses the trend of consumption of petroleum products in the country during the month of Sep 2025. Data on product-wise monthly consumption of petroleum products for Sep 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 Sep 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-September 2025								
Product	September (TMT)				April-September (TMT)			
	2024	2025	% share of September' 25	Growth (%)	2024-25	2025-26	Growth (%)	% share of Apr-Sep'25
<b>(A) Sensitive Products</b>								
LPG	2610	2803	15.0	↑ 7.4	15025	16200	↑ 7.8	13.7
SKO	36	37	0.2	↑ 0.6	205	212	↑ 3.7	0.2
<b>Sub Total</b>	<b>2646</b>	<b>2839</b>	<b>15.2</b>	<b>7.3</b>	<b>15230</b>	<b>16413</b>	<b>7.8</b>	<b>13.9</b>
<b>(B) Major Decontrolled Product</b>								
HSD	6369	6794	36.3	↑ 6.7	44382	45692	↑ 3.0	38.6
MS	3149	3401	18.2	↑ 8.0	19850	21191	↑ 6.8	17.9
Naphtha	1018	932	5.0	↓ -8.4	6718	5854	↓ -12.9	4.9
ATF	726	720	3.9	↓ -0.8	4377	4418	↑ 0.9	3.7
Bitumen	416	560	3.0	↑ 34.5	3629	3829	↑ 5.5	3.2
FO/LSHS	561	533	2.9	↓ -5.0	3295	3036	↓ -7.9	2.6
Lubes+Greases	382	397	2.1	↑ 4.1	2323	2317	↓ -0.3	2.0
LDO	71	90	0.5	↑ 26.2	390	509	↑ 30.5	0.4
<b>Sub Total</b>	<b>12692</b>	<b>13428</b>	<b>71.8</b>	<b>5.8</b>	<b>84966</b>	<b>86846</b>	<b>2.2</b>	<b>73.4</b>
<b>(C) Other Minor Decontrolled Products</b>								
Pet.Coke	1213	1587	8.5	↑ 30.9	10366	9844	↓ -5.0	8.3
Others*	859	843	4.5	↓ -1.9	6532	5192	↓ -20.5	4.4
<b>Sub Total</b>	<b>2072</b>	<b>2430</b>	<b>13.0</b>	<b>17.3</b>	<b>16897</b>	<b>15036</b>	<b>-11.0</b>	<b>12.7</b>
<b>Total</b>	<b>17410</b>	<b>18697</b>	<b>100</b>	<b>7.4</b>	<b>117093</b>	<b>118295</b>	<b>1.0</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 Aug'25-Sep'25, which may undergo change on receipt of actual data), and

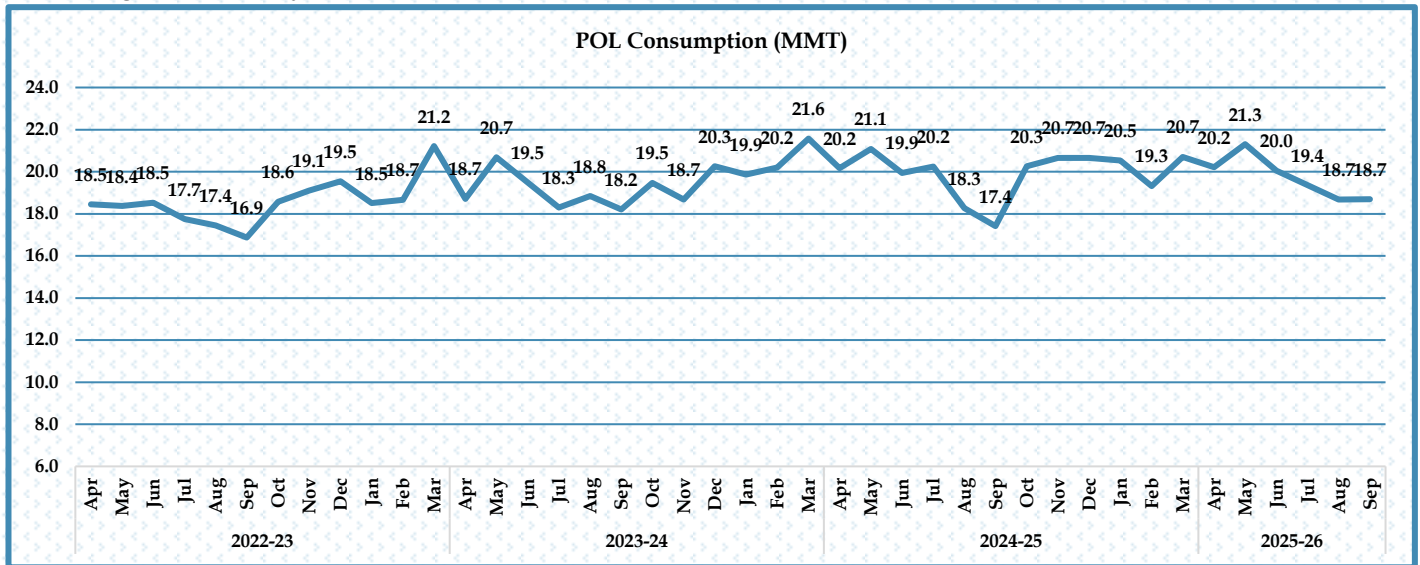
(c) sales by SEZ units in Domestic Tariff Area (DTA) are provisional due to portal upgrade.

**India's petroleum product consumption in September 2025 was 18.70 million tonnes. This is about 7% more than in September 2024. This growth was primarily driven by higher demand for petrol (MS) at 8.0%, diesel (HSD) at 6.7%, LPG at 7.4%, and lubricants at 4.1%.**

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.

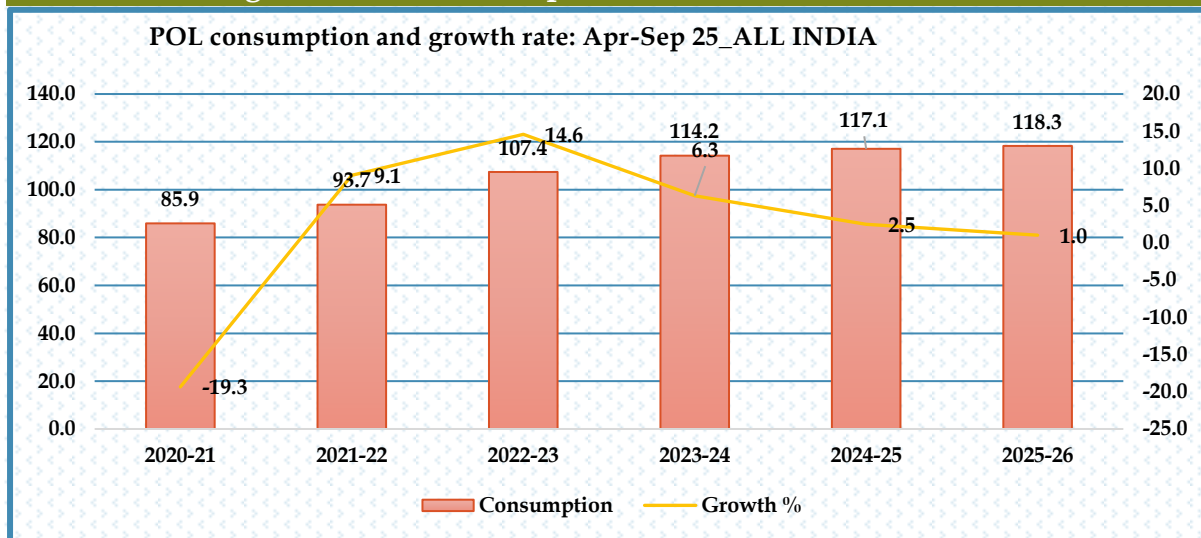
Figure-A: Monthly POL consumption (MMT) since April 2022



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

consumption is growing moderately inspite of 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):**

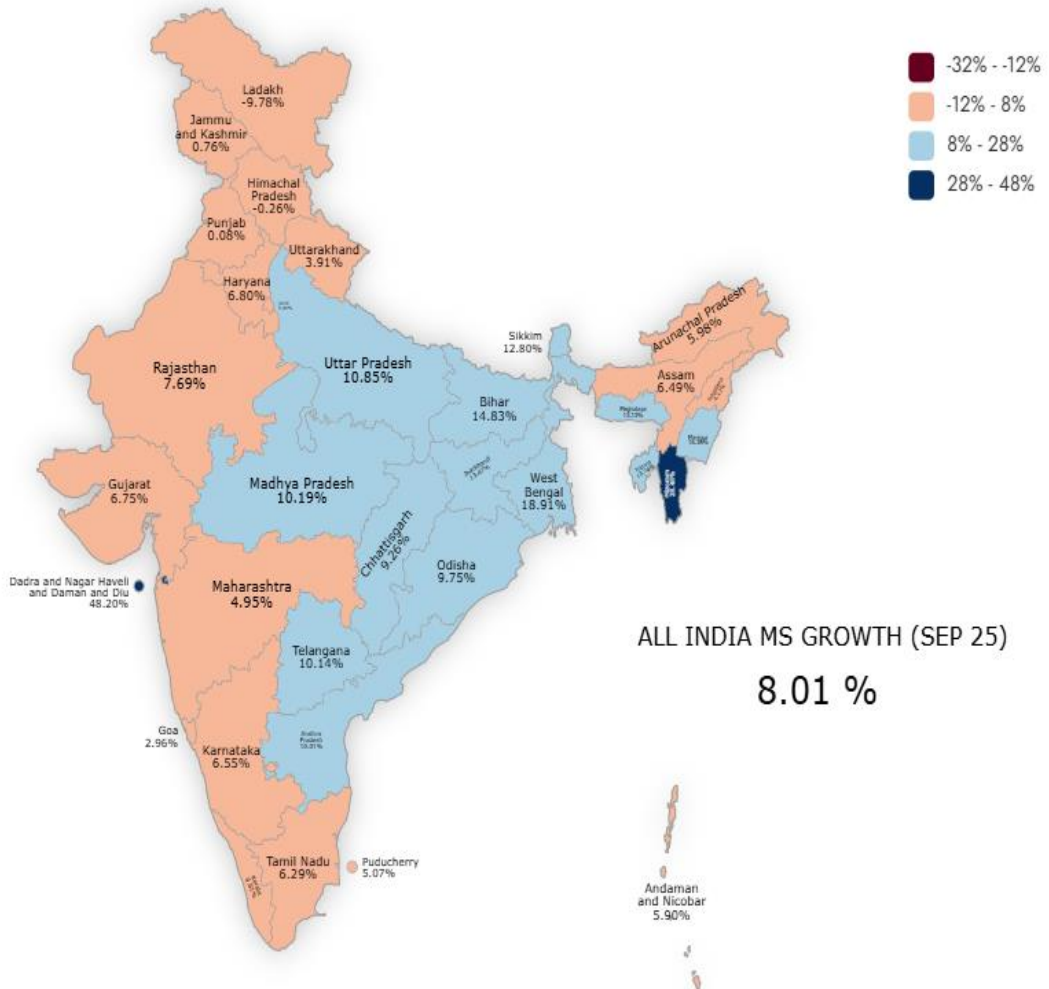
MS (Petrol) consumption during the month of Sep 2025 with a volume of 3.40 MMT recorded a growth of 8.0% on the volume of 3.15 MMT in Sep 2024. Cummutively MS is growing at 6.8 % from Apr-Sep 25 period

PSU's registered a growth rate of 6.7% as against 21.2% achieved by their private sector counterparts in Sep-25. Market share held by PSU reduced by 1.08% (90.04% share) with corresponding increase in market share held by Private sector OMC's.

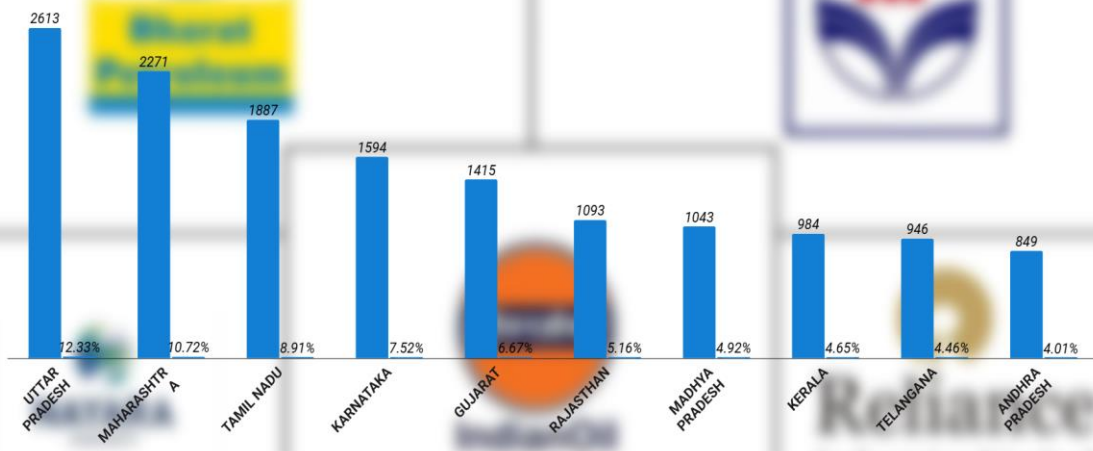
Major factors contributing to MS consumption during the month are as follows:

- Rising vehicle ownership is helping to drive petrol (MS) sales higher. According to FADA, between April and September 2025, there were 8.8 million new two-wheelers and 1.95 million new passenger vehicles registered, growing by 3.07% and 3.67% respectively over the previous year.
- Strong double-digit growth in petrol sales in major states like Uttar Pradesh, Telangana, Andhra Pradesh, and West Bengal gave a significant boost to overall petrol demand in September 25
- The onset of the festival season, which boosted travel have also contributed in increasing the MS sales.

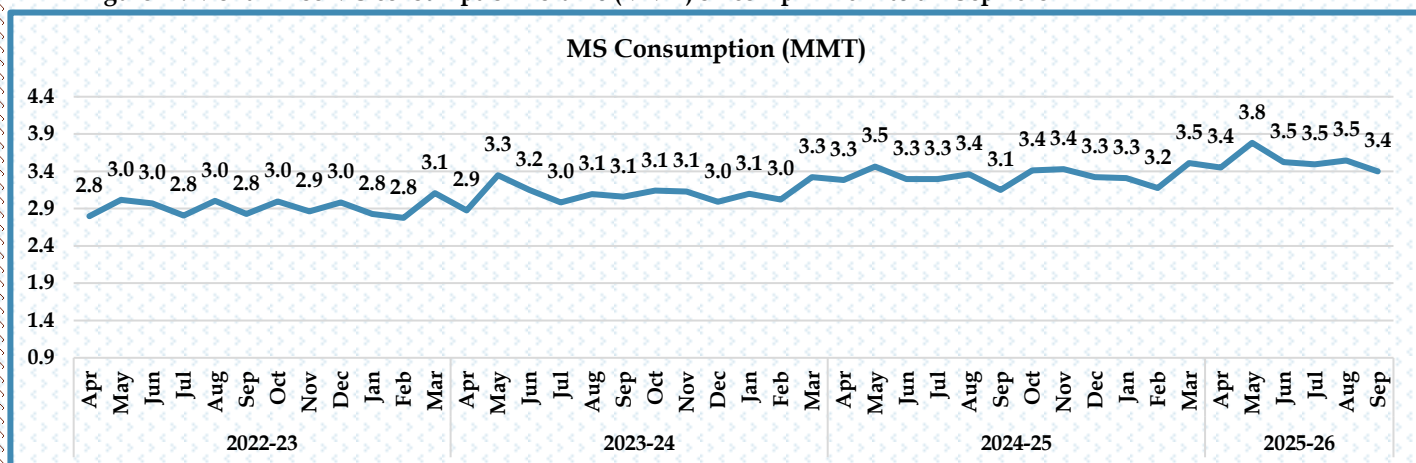
Figure-C: State Wise Growth in MS Month of Sep -2025



**TOP 10 STATE WISE SALES (TMT) AND SHARE IN MS ON ALL INDIA BASIS (APR-SEP 25)**



**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 Sep-2025**



**Factors impacting consumption of MS:**

**Passenger Vehicle Sales:**

The Sale of Passenger Vehicles in Sep 2025 at 2.99 lacs registered 5.8% growth YoY basis over sale of

2.83 lacs in the month of Sep 2024. The details of various segments of PVs are tabulated below, as shown in the following Table-2.

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

Vehicle Segment	Sep 25		
	2024	2025	Growth %age
<b>Total PV</b>	282,945	299,369	5.8%

Source: FADA

**Two-Wheeler Sales:**

Two-wheeler sales in Sep 2025 with a volume of 12.88 lacs registered 6.5 growth, YoY basis over

volume of 18.09 lacs during Sep 2024, as shown in the following table-3.

**Three-Wheeler sales**

Three-wheeler domestic sales in Sep 2025 with a volume of 0.99 lac recorded a de-growth of 7.3%,

YoY basis over the volume of 1.06 lac in Sep 2024, as shown in the following table-3

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

Vehicle Segment	Sep'25		
	2024	2025	Growth %age
<b>Total Two Wheelers</b>	1,208,996	1,287,735	6.5%
Passenger Carrier-3 wheeler	48,717	49,045	0.7%
Goods Carrier-3 wheeler	9,116	9,569	5.0%
E-Rickshaw	44,044	34,083	-22.6%
E-cart	4,570	6,031	32.0%
<b>Total Three Wheelers</b>	106,447	98,728	-7.3%

Source: FADA

**High Speed Diesel (HSD):**

HSD (Diesel) consumption during the month of Sep 2025 with a volume of 6.79 MMT, registered a high growth of 6.7% on the volume of 6.37 MMT in the month of Sep 2024.

- PSU's registered a 5.2% growth their private sector counterparts in the month of Sep-25.
- **Market share held by PSU reduced by 1.18% (87.12% share) with corresponding increase in market share held by Private sector OMC's.**

**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 12.5 % in Apr-Sep 25. Retail segment grew at 1.6 % in the same

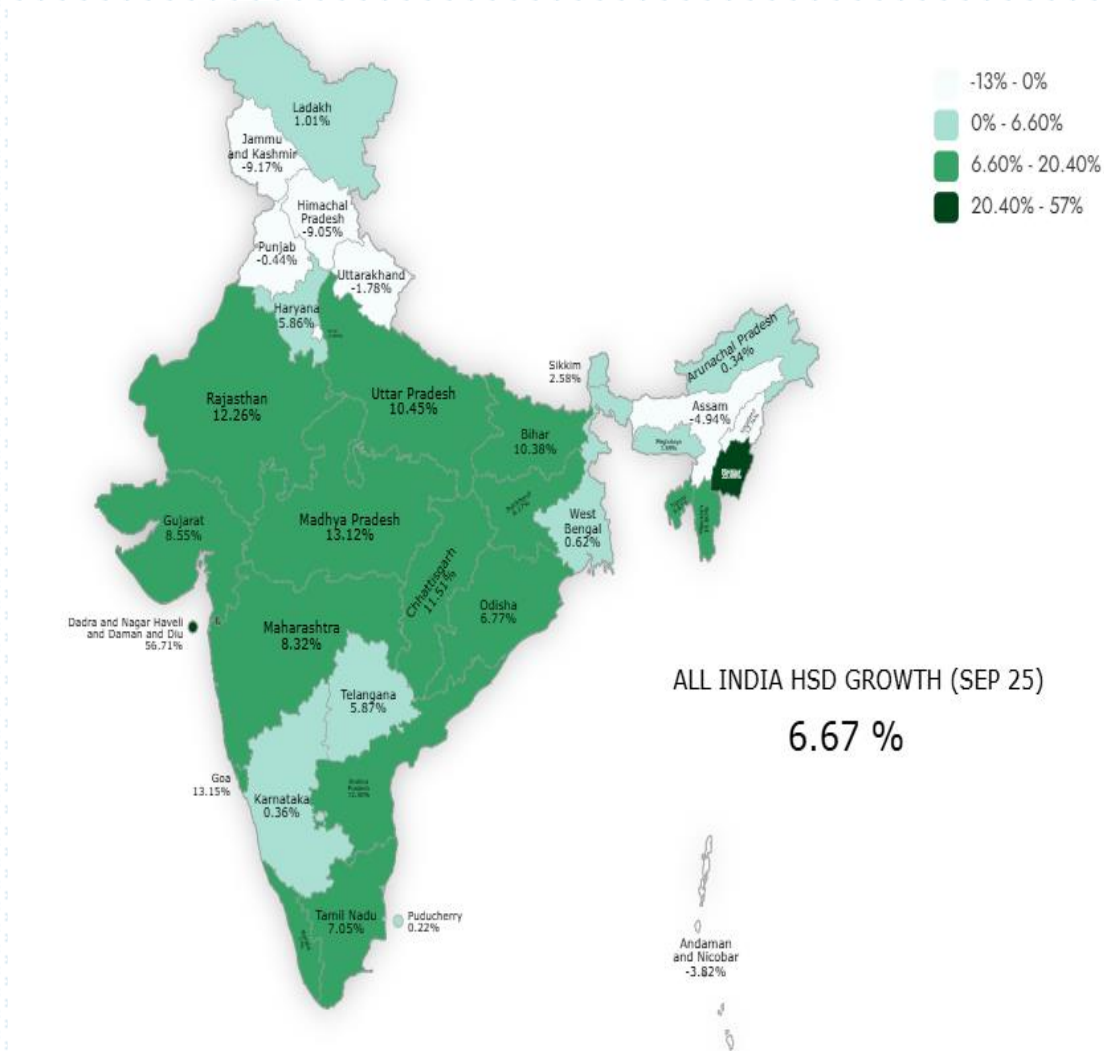
period. HSD consumption in Major sectors like Manufacturing showing healthy growth during Apr -Sep 25 period

- HSD consumption registered a robust 6.6% year-on-year increase in September 2025, primarily driven by improved demand from the manufacturing sector and a notable rise in freight movement following the GST revision effective from 22nd September 2025.

- All Big states Gujarat / Maharastra/ Uttarpradesh are growing above the national average of 6.6 % in the month of Sep 25 .

- 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 Sep-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

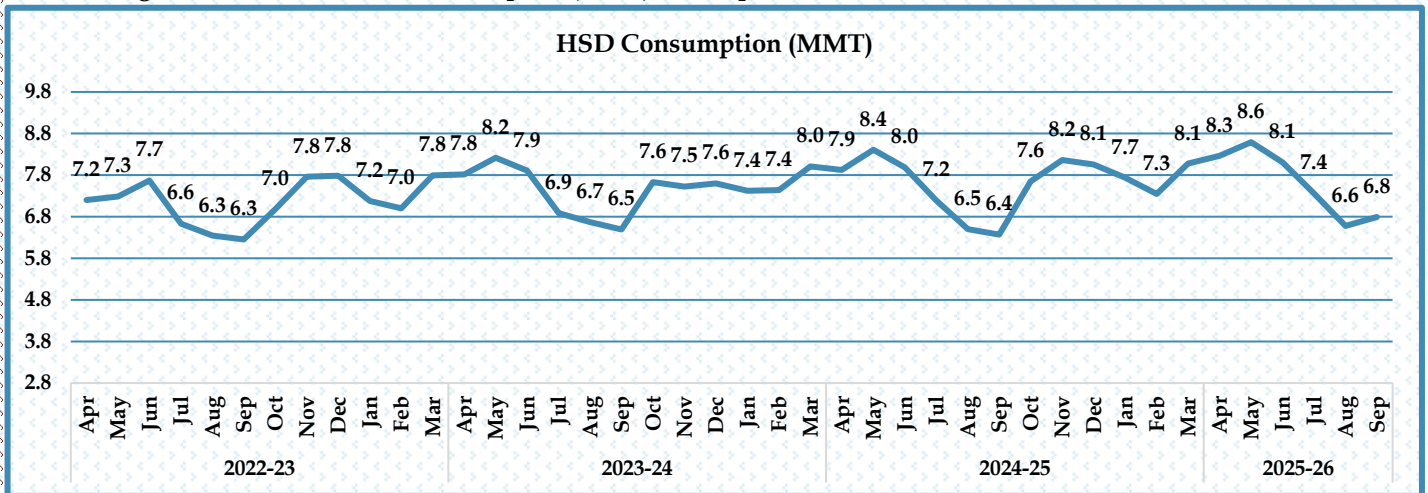
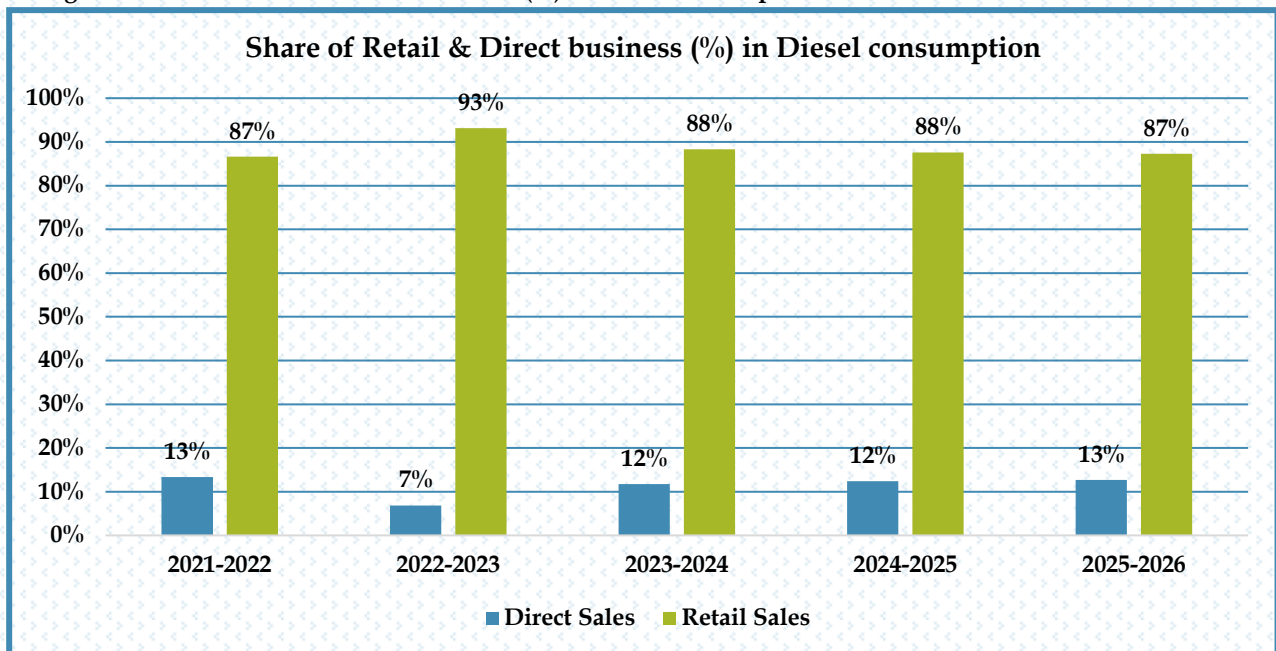


Figure-G: Share of Retail & Direct business (%) in Diesel consumption



## Factors impacting consumption of HSD:

### Weather

- **Northern India:** Rainfall may remain high during the first half of the month before the monsoon recedes. Flooding possible in hilly areas.
- **Eastern & Northeastern India:** Likely to receive better rainfall than in prior months, helping reduce the seasonal deficit.
- **Central India:** Expected to see continued monsoon activity into early September, improving soil moisture and reservoirs.
- **Northwestern India:** Could record strong rainfall in the early phase, but with the monsoon's gradual retreat, rains may taper off later.
- **Southern Peninsula:** Residual monsoon and possible coastal systems may bring localized heavy showers, especially before the withdrawal fully sets in.

**Overall Summary:** September 2025 is expected to be **wetter than normal**, with India receiving over 109 % of average rainfall. The monsoon will begin its withdrawal mid-month, but not before leaving a strong imprint, especially in northern, central, and eastern regions. Risks of flash floods and landslides will remain elevated in susceptible zones due to enhanced rainfall and saturation.

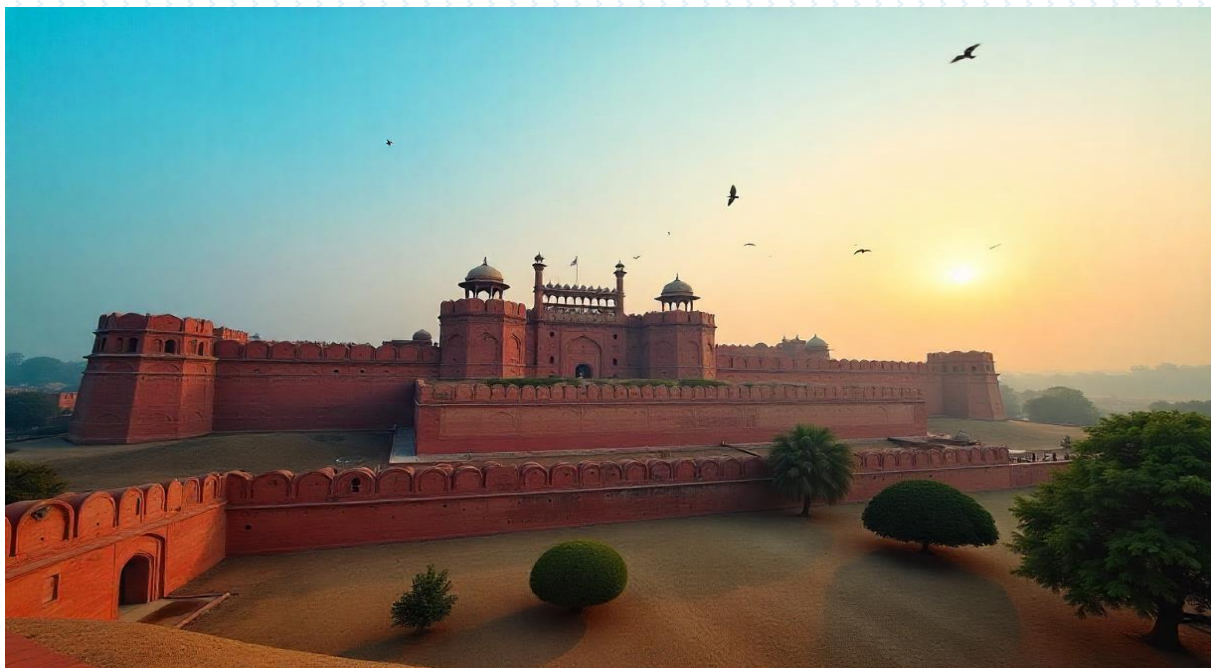


Figure- H: State wise Rainfall Map for Sep 25. (Source : Indian Metreological Department)

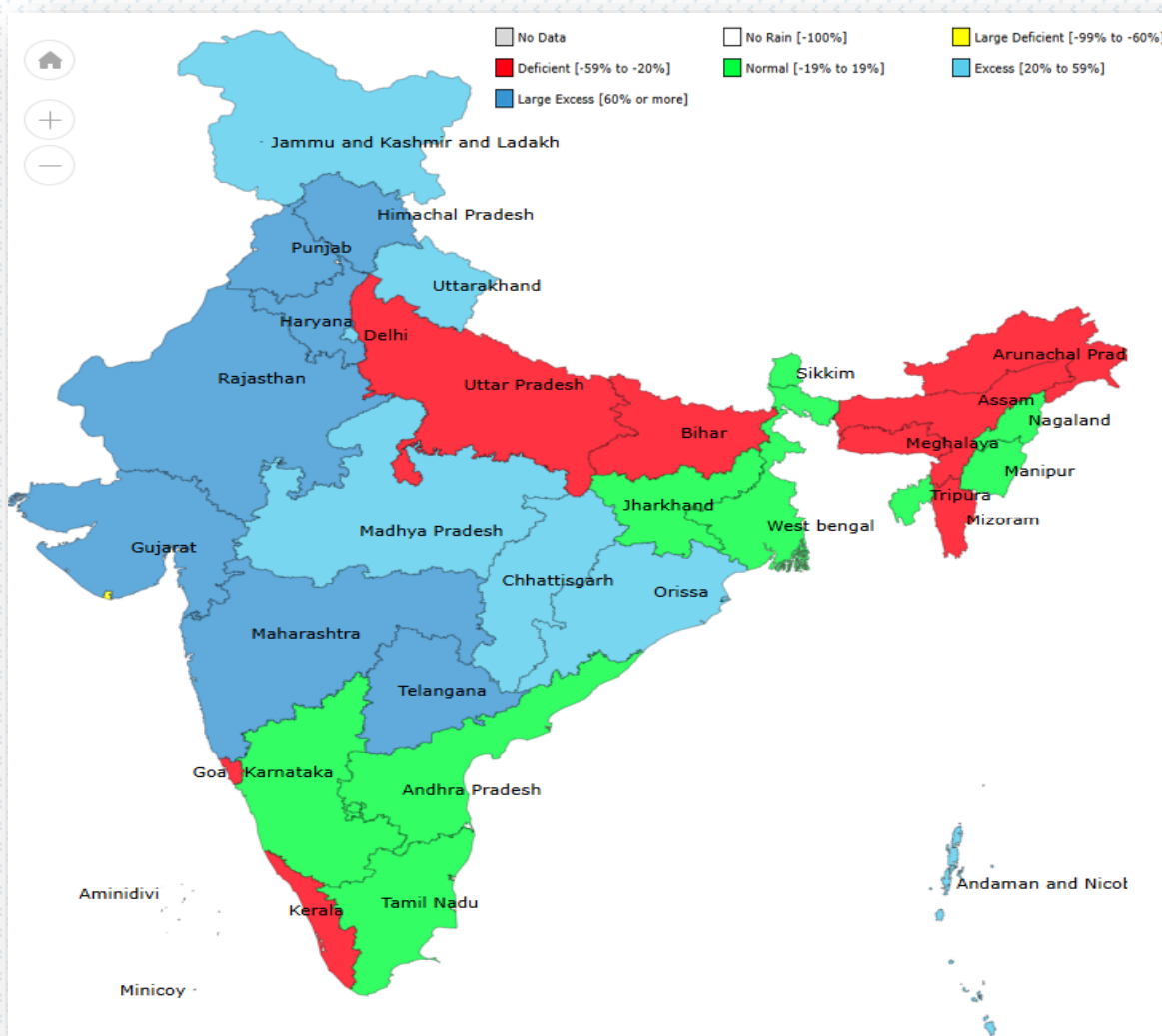


Table-4 Details of the Total E-Way Generated in CY vis-a-vis LY :

(No of Eway Bills Generated in Lakhs)

Month	Sep-25	Sep-24	Variance	Apr-Sep 25	Apr-Sep 24	Growth
Intra State	859.24	690.11	25%	4,933.04	3,995.54	23.5%
Inter State	460.86	400.48	15%	2,611.30	2,197.63	18.8%
<b>Total</b>	<b>1,320.10</b>	<b>1,090.59</b>	<b>21%</b>	<b>7,544.34</b>	<b>6,193.17</b>	<b>21.8%</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 2.7% as compared to Sep 2024 as shown in Table-5

#### Tractor Sale:

Tractor domestic sales in Sep 2025 with a volume of 64,785 registered a robust growth of 3.6% over the volume of 62,527 in Sep 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		Sep'25		
		2024	2025	Growth %age
CV	LCV	41,869	44,392	6.0%
	MCV	5,604	6,257	11.7%
	HCV	22,694	21,410	-5.7%
	Others	87	65	-25.3%
<b>Total CVs</b>		<b>70,254</b>	<b>72,124</b>	<b>2.7%</b>
<b>Tractors</b>		<b>62,527</b>	<b>64,785</b>	<b>3.6%</b>

Source: FADA research

### Port Traffic:

The Major Ports achieved cargo throughput of 437.57 MMT during April-Sep'2025 which is 5.75% higher over same Period last year.

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

Ports	Apr-Sep'25	Apr-Sep'24	Growth (%)
Kolkata & Haldia	33320	28582	16.58
Paradip	76780	73157	4.95
Visakhapatnam	43086	41792	3.10
Kamarajar (Ennore)	23844	23684	0.68
Chennai	29466	27088	8.78
V.O. Chidambaranar	21288	21011	1.32
Cochin	18627	18536	0.49
New Mangalore	22611	21081	7.26
Mormugao	9389	8200	14.50
Mumbai	35153	34450	2.04
JNPA	49633	44801	10.79
Deendayal	74368	71392	4.17
<b>Total:</b>	<b>437565</b>	<b>413774</b>	<b>5.75</b>

### POWER SITUATION:

India's peak demand for power degrew to 242.77 gigawatt (GW) in Apr-Sep'25 against 249.86 GW registered in the same period of last year. The peak demand is at similar level to its earlier peak of

242.77 GW registered in Apr-Sep'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-Sep 2025)**

Year	Energy				Peak			
	Requireme nt	Availabi lity	Surplus(+)/Deficts(-)		Peak Demand	Peak Met	Surplus(+)/ Deficts(-)	
	(MU)	(MU)	(MU)	(%)	(MW)	(MW)	(MW)	(%)
<b>2021-22</b>	1,275,534	1,270,663	-4,871	-0.4%	190,198	189,395	-803	-0.4%
<b>2022-23</b>	1,379,812	1,374,024	-5,788	-0.4%	203,014	200,539	-2,475	-1.2%
<b>2023-24</b>	1,511,847	1,504,264	-7,583	-0.5%	215,888	207,231	-8,657	-4.0%
<b>2024-25</b>	887,531	886,308	-1,223	-0.1%	249,856	249,854	-2	0.0%
<b>2025-26</b>	894,414	894,152	-262	0.0%	242,773	242,493	-280	-0.1%

## SECTORAL CONSUMPTION OF HSD:

During 'April-Sep-25, HSD total consumption with a volume of 45.69 MMT registered 3.0% growth Year-on-Year basis over the volume of 44.38 MMT in 'April-Sep-24.

87% of HSD consumption during 'April-Sep-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 'April-Sep-24' also after direct sales volume recovering back.

Growth of 3.0% during Apr-Sep'25 was driven by increased economic activity & freight movement, evident by a 22% 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 April-Sep-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 13% 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 April-Sep'25 and its comparison with April-Sep'24

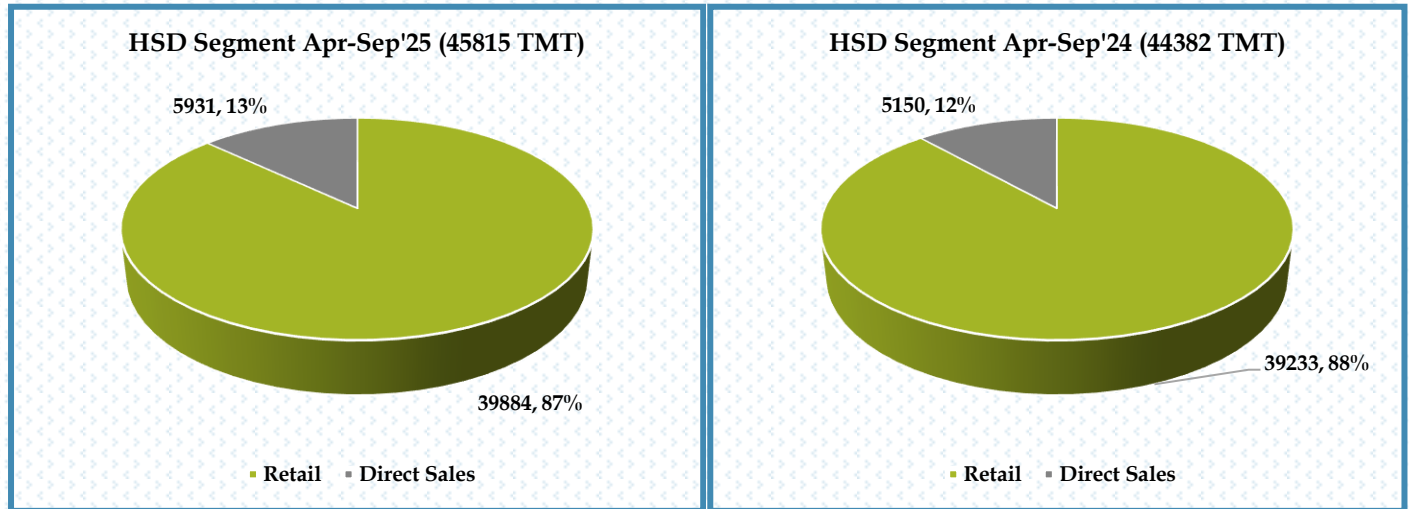
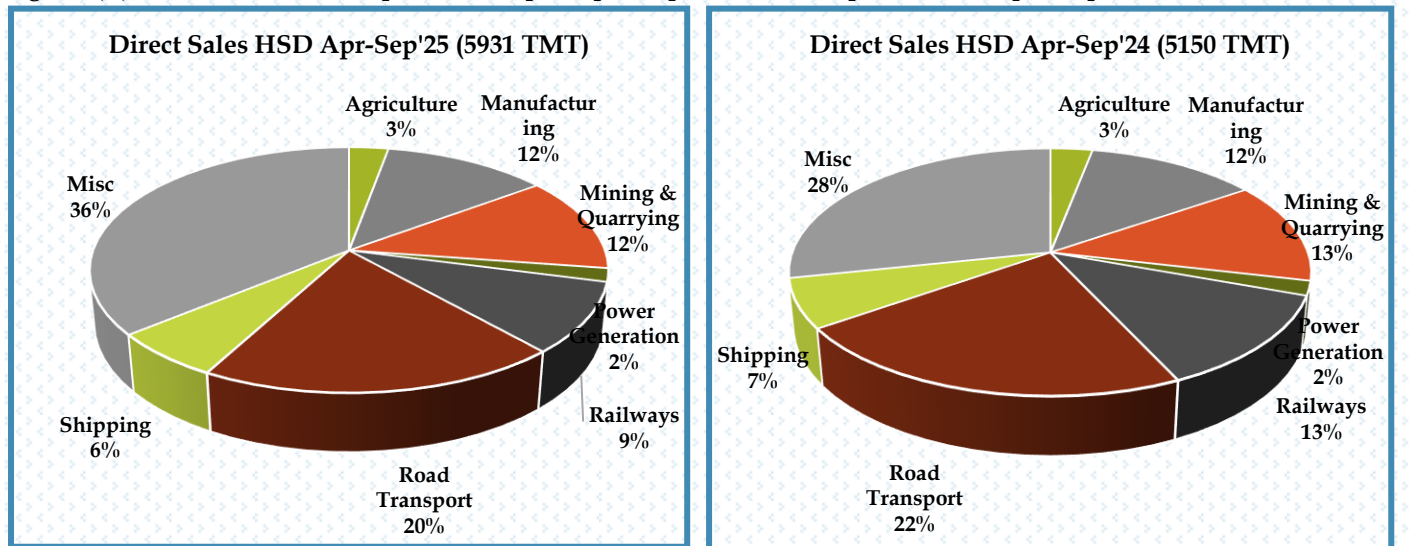


Figure-I(II): Sectoral HSD consumption Breakup in April-Sep'25 and its comparison with April-Sep'24



Share of Manufacturing has decreased from 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, Fertilizers, Textiles, Ceramic & glass & other Misc Consumer/Industrials goods.

## Kerosene:

Kerosene (SKO) consumption with a volume of 0.04 MMT registered a growth of 0.2% in Sep 2025 as compared to Sep 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 & Utrakhand have nil allocation this financial year.

The market share of subsidized-PDS and other SKO was 67% & 33% respectively for the month Sep 2025 as shown in the following figure-J.

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

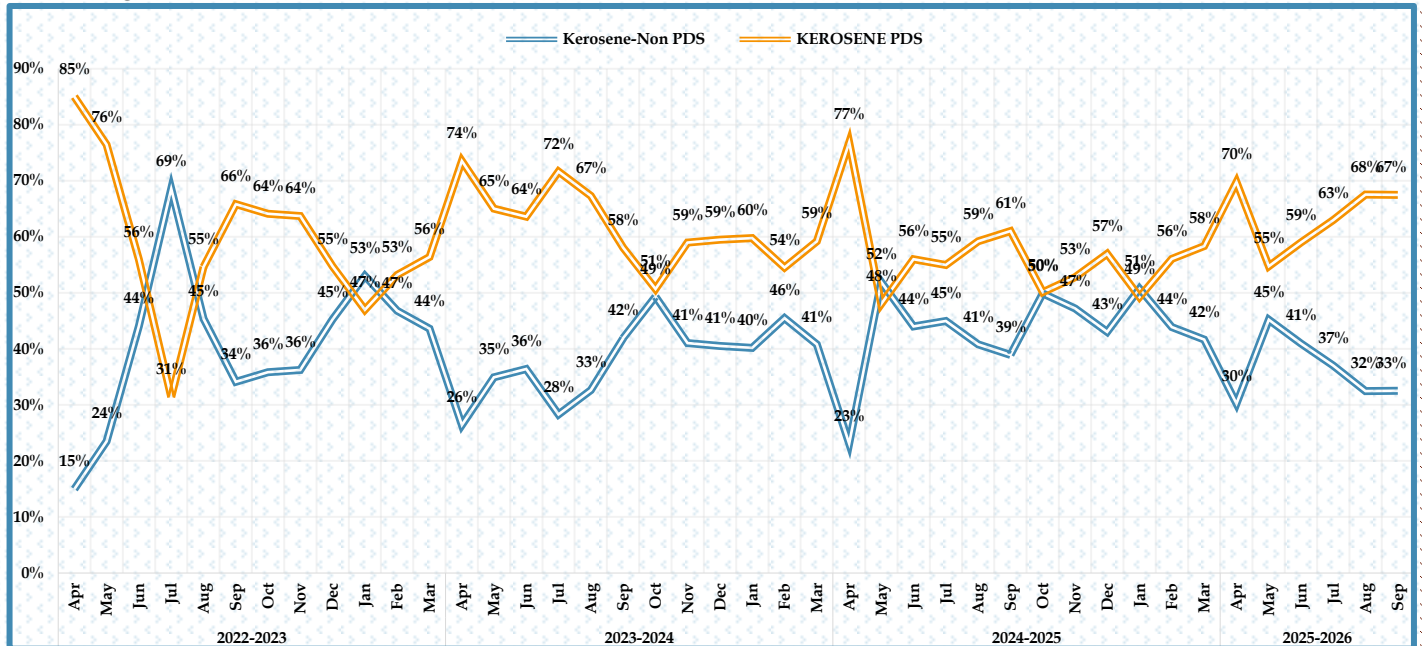
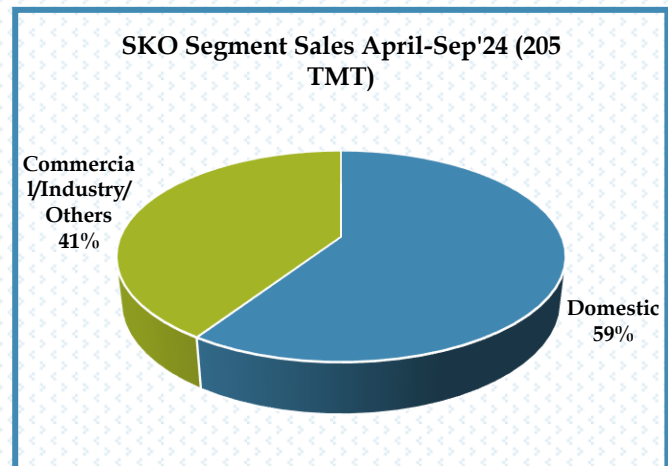
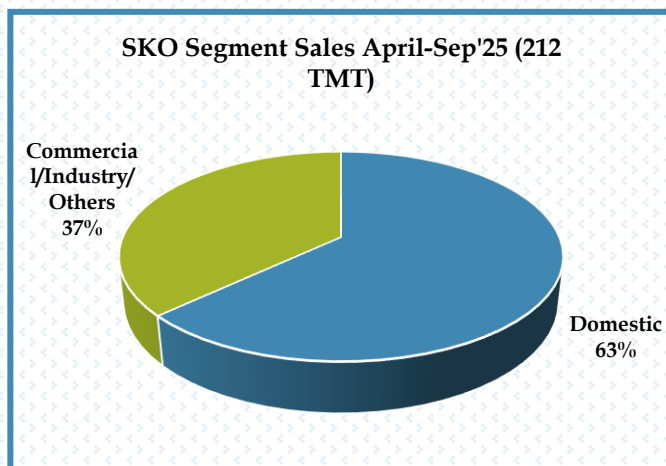


Figure-K: \*Other SKO: non-subsidized PDS SKO +non-PDS kerosene



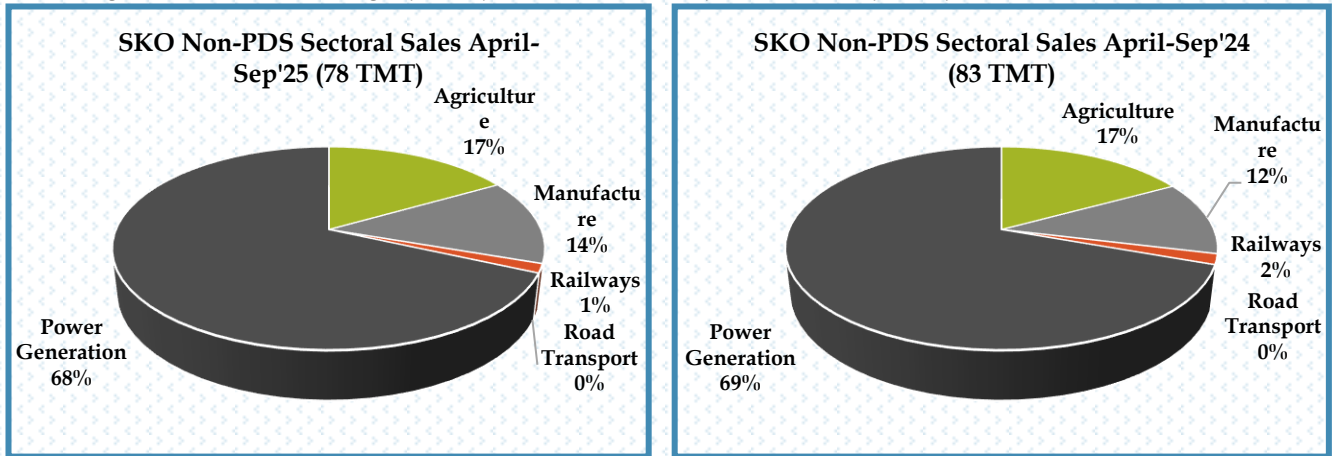
## Sectoral consumption of SKO:

Out of total SKO sales during 'April-Sep'25 'PDS subsidized SKO' upliftment constituted to 63%. So far as sales in 'Other SKO' is concerned, agriculture accounted for 17% share,

Manufacturing 14%, and Miscellaneous applications at 68%.

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 'April-Sep'25 and its YoY comparison with 'April-Sep'24

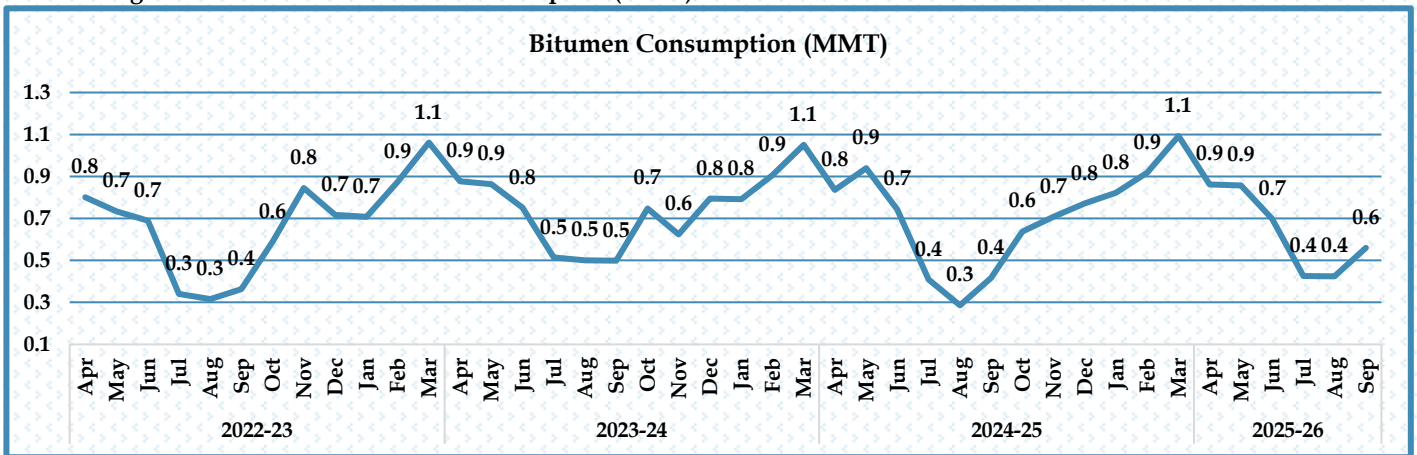


**BITUMEN:**

Bitumen consumption during Sep 2025 with a volume of 0.56 MMT registered growth of 34.5%

over the volume of 0.42 MMT in the month of Sep 2024. Import of Bitumen is also increased by 49 % in Sep 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 'April-Sep-25, total bitumen consumption with a volume of 3.83 MMT registered a growth of 5.5% Year-on Year basis over the volume of 3.63 MMT in 'April-Sep-24.

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

**LPG:**

LPG consumption during the month of Sep 2025 with a volume of 2.80 MMT registered growth in the month at 7.4% over the volume of 2.61 MMT in the month of Sep 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 85.8 % in Sep 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. 5.1% growth in Packed domestic LPG consumption in Sep'25 as compared to Sep'24.
2. Growth of 17.4% in non-domestic packed segment is due price advance of 19kg cyl in Sep'25 (Rs. 1580.0) as compared to Sep'24 (1691.5).
3. Under PMUY scheme 10.33 crores beneficiaries at the end of Sep 2025.
4. As on 1.10.2025, total active domestic connections in India are 3306.6 lakhs

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

- PMUY growth 11.0% wherein OMCs-wise %growth as contributed by 18.2% (HPC), 9.9% (IOC) & 6.7% (BPC).

As of now, more than ~65.9% of non-PMUY

consumers have DBCs connections and thus making a positive impact on LPG consumption. New connections ~99.7% issued with DBCs in Sep'25 (including SBC to DBC conversion).

5. 16.8 Crs cylinders of 14.2kg (~54.2 lacs/day) were delivered in Sep'25 compared to 16.0 Crs in Sep'24.

6. Growth of 53.0% 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 Sep'25 Rs. 70.2/kg as compared to Sep'24 rate was Rs. 72.6/kg.

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

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

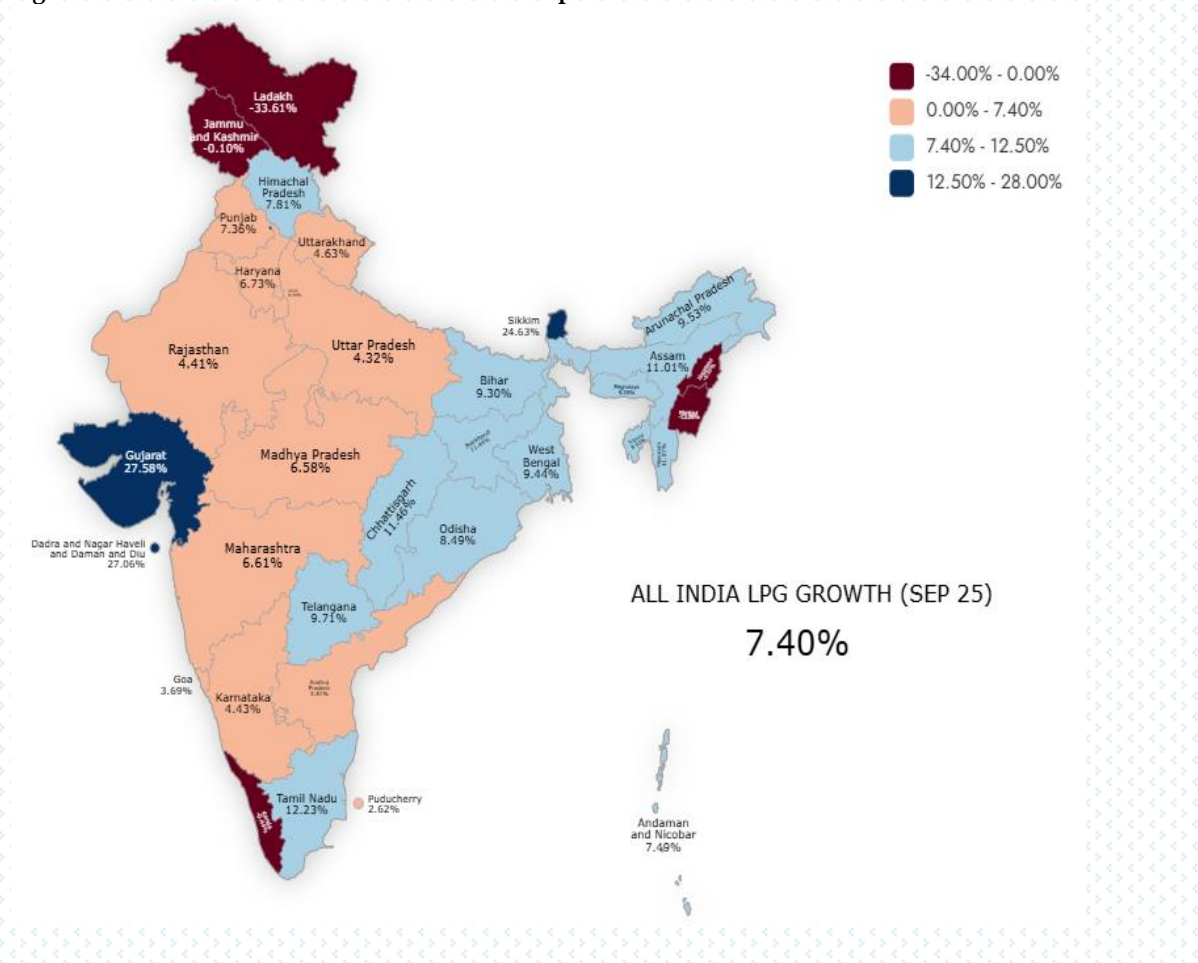
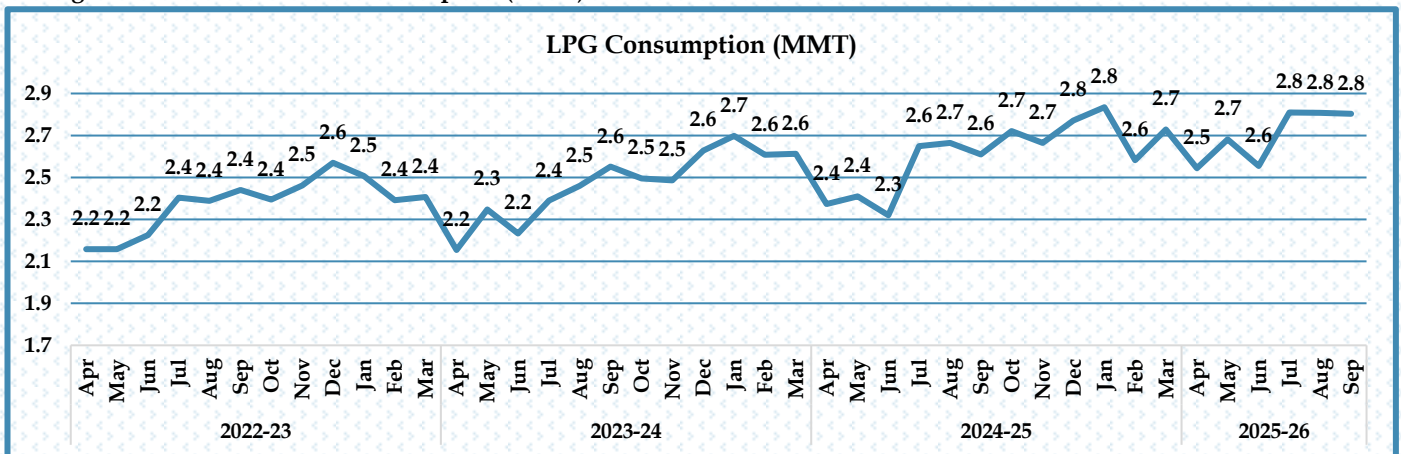




Figure-O: Month-wise LPG consumption (MMT)

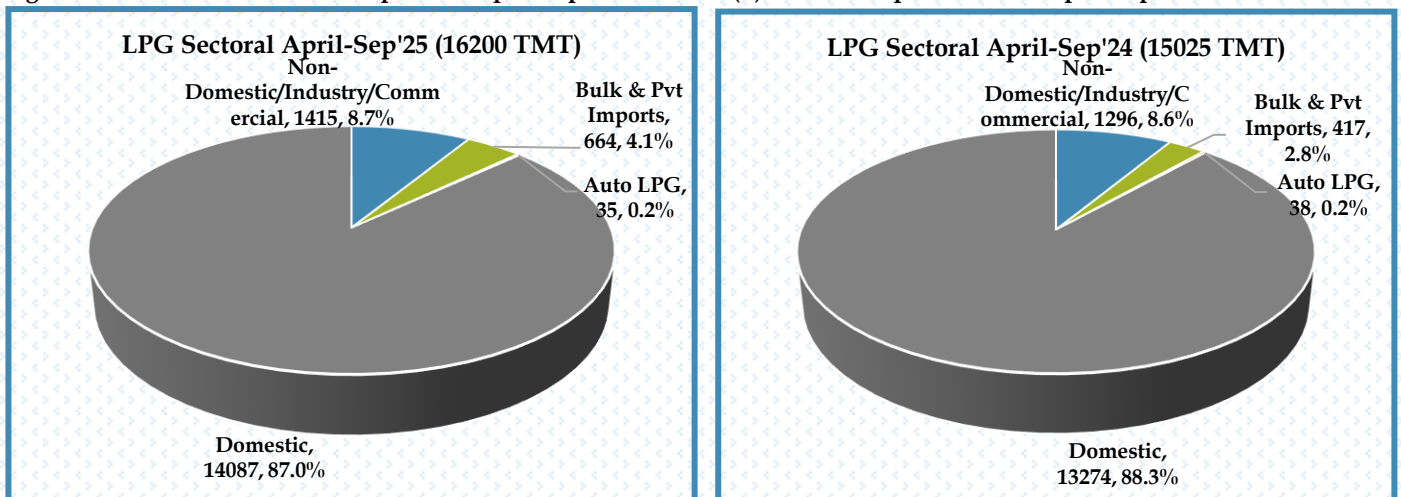


### Sectoral consumption of LPG:

During 'April-Sep-25, total LPG domestic consumption with a volume of 16.20 MMT registered 7.8% growth Year-on-Year basis over the volume of 15.03 MMT in 'April-Sep-24.

The Sectoral LPG consumption during 'April-Sep-25', was driven by Domestic packed at 87.0%, followed by LPG 'non-domestic/ industry/ commercial sector 8.7% & Bulk at 4.1%. Auto LPG at 0.2% has been on the negative trajectory getting displaced by CNG.

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



**Naphtha:**

Naphtha consumption during Sep 2025 with a volume of 0.93 MMT registered a de-growth of 8.4%, over a volume of 1.02 MMT during the month of Sep 2024. Petrochemical industries remain the main consumers of naphtha. Naphtha consumption showed a de-

growth during the Sep 25 with reduced consumption in Petchem plants and reduction in the import of naphtha by 41 %. Gujarat is major consumption center , contributing 55 % to the total sales of naphtha in the country .

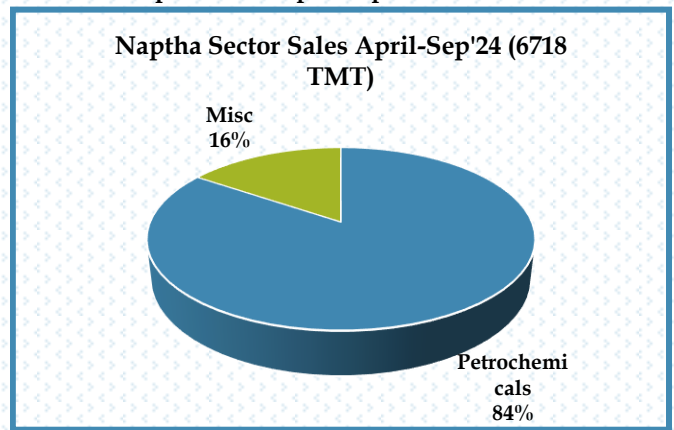
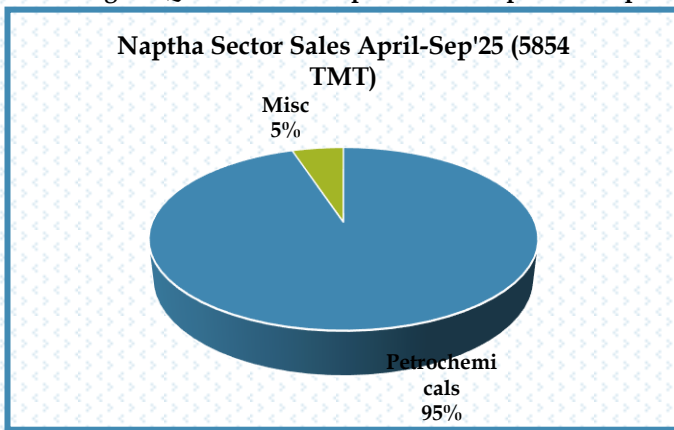
**Sectoral consumption of Naphtha:**

During 'April-Sep-25, total Naphtha domestic consumption with a volume of 5.85 MMT registered de-growth of 12.9% . Year-on Year basis over the volume of 6.72 MMT in 'April-Sep-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 'April-Sep-25 and its comparison to 'April-Sep-24



**ATF:**

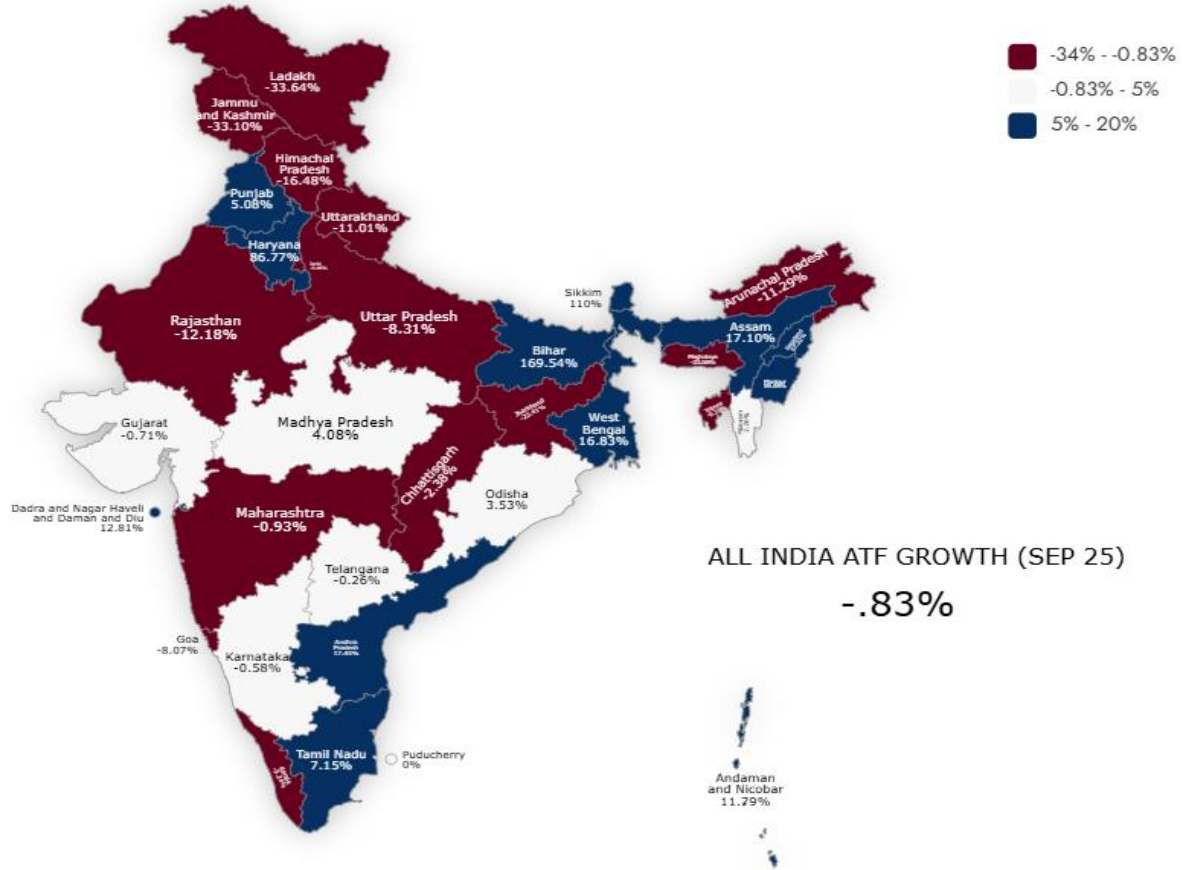
ATF consumption during Sep 2025 with a volume of 0.72 MMT continued to registered a de-growth of 0.8%, over a volume of 0.73 MMT during the month of Sep 2024.

disruptions caused by runway renovation at Delhi Airport – which resumed on 15th September 2025 – and widespread heavy monsoon rains across much of the country, both of which significantly impacted air travel operations and led to lower ATF consumption.

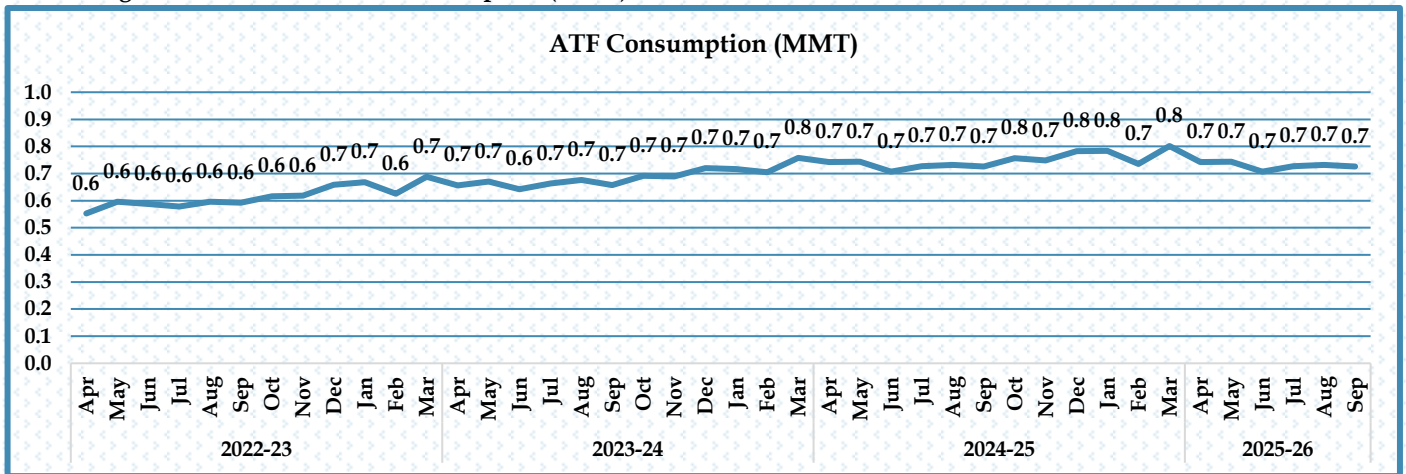
Aviation Turbine Fuel (ATF) registered a negative growth of 0.8%, primarily due to extensive flight



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



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



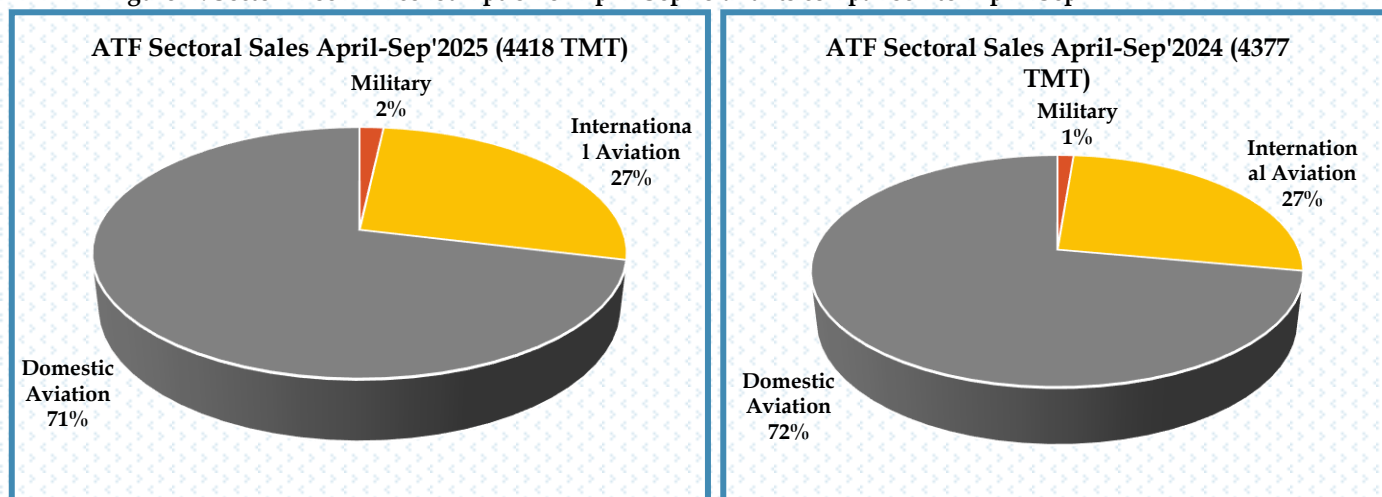
**Sectoral consumption of ATF:**

During 'April-Sep'25, total ATF domestic consumption with a volume of 4.42 MMT registered 0.9% growth Year-on-Year basis over the volume of 4.38 MMT in 'April-Sep-24.

Almost entire ATF consumption during 'April-Sep-25 was attributed to aviation; 71% domestic aviation, 27% international aviation & 2% 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 April-Sep-25 and its comparison to 'April-Sep-24**



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

During the month of August 2025, all operational airports (taken together) handled 230.12 thousand aircraft movements (excluding General Aviation Movements), 33.08 million passengers and 330.69 thousand tonnes of freight.

The International aircraft movements, domestic aircraft movements and total aircraft movements have increased by 6.3%, 1.0% and 1.8% respectively during (April-August) 2025-26 as compared to (April- August) 2024-25.

The International passengers traffic, domestic passengers and total passenger traffic have increased by 6.8%, 2.6% and 3.4% respectively during the period (April- August )2025-26 as compared to (April- August) 2024-25.

The International freight traffic, domestic freight and total freight traffic have increased by 4.5%, 6.4% and 5.2% respectively during the period (April- August) 2025-26 as compared to (April- August) 2024-25.

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

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

CATEGORY	Aug		%
	2025-26	2024-25	CHANGE
<b>Aircraft Movements (in '000)</b>			
International	40.94	39.03	4.9
Domestic	189.18	199.34	-5.1
<b>Total</b>	<b>230.12</b>	<b>238.37</b>	<b>-3.5</b>
General Aviation	24.32	19.94	22.0
<b>Grand Total(INTL+DOM+Gen)</b>	<b>254.44</b>	<b>258.31</b>	<b>-1.5</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:

REGION WISE TRENDS IN AIR TRAFFIC vis-à-vis ATF Consumption									
Aug									
REGION	Aug			REGION	Aug		Change	Difference	
	2025-2026		2024-2025		2025-2026				2024-2025
	AIRCRAFT MOVEMENTS (IN NOS)		ATF CONSUMPTION (IN TMT)						
EASTERN	23269	23700	-1.8%	EASTERN	47	43	8.2%	-10.0%	
NORTH EAST	7259	7857	-7.6%	NORTH EAST	13	14	-2.2%	-5.4%	
NORTHERN	47081	53839	-12.6%	NORTHERN	250	268	-6.7%	-5.8%	
SOUTHERN	61150	60930	0.4%	SOUTHERN	224	232	-3.4%	3.8%	
WESTERN	50418	53013	-4.9%	WESTERN	176	174	1.0%	-5.9%	
<b>Total</b>	<b>189177</b>	<b>199339</b>	<b>-5.1%</b>	<b>Total</b>	<b>710</b>	<b>731</b>	<b>-2.9%</b>	<b>-2.2%</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 Sep 2025 with a volume of 0.533 MMT with a de-growth of 5.0% over the volume of 0.561 MMT in Sep-2024.

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

- The sectors of Iron & steel sector showed degrowth during the month on account of shift to cleaner fuel mainly Gas.
- The Shipping sector was the major sector for the product with the highest share of 26% is also de growing in the month of Sep 25
- Mining and Road transport sector shown healthy growth for FO/LSHS in the month Sep 25

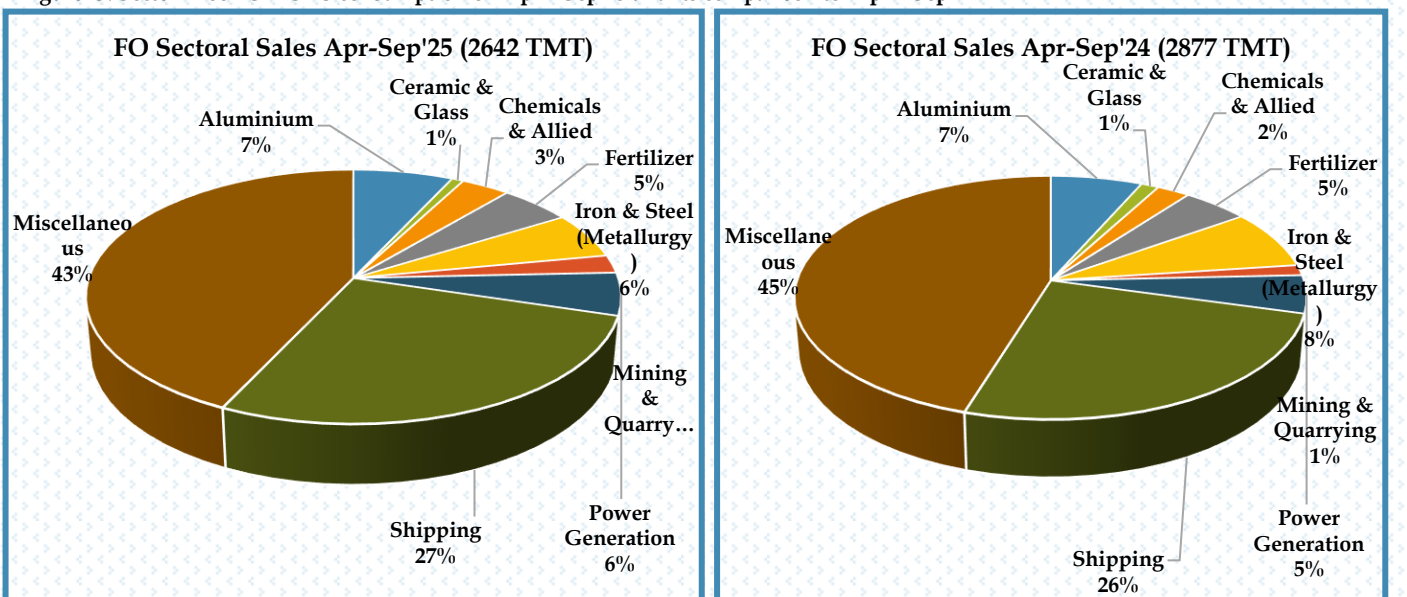
**Sectoral consumption of FO/LSHS:**

During 'April-Sep'25, total FO/LSHS consumption with a volume of 3.04 MMT with a de-growth of 7.9% Year-on Year basis over the volume of 3.29 MMT in 'April-Sep'24.

Further Product wise consumption for FO Apr-Sep'25 was 2.6 MMT vs 2.9 MMT in Apr-Sep'24 (8.2% de-growth). For LSHS, Apr-Sep'25 was 0.36 TMT vs 0.42 TMT in Apr-Sep'24 (14.2 % De-growth)

Details YoY comparisons are pictorially presented in the following figure.

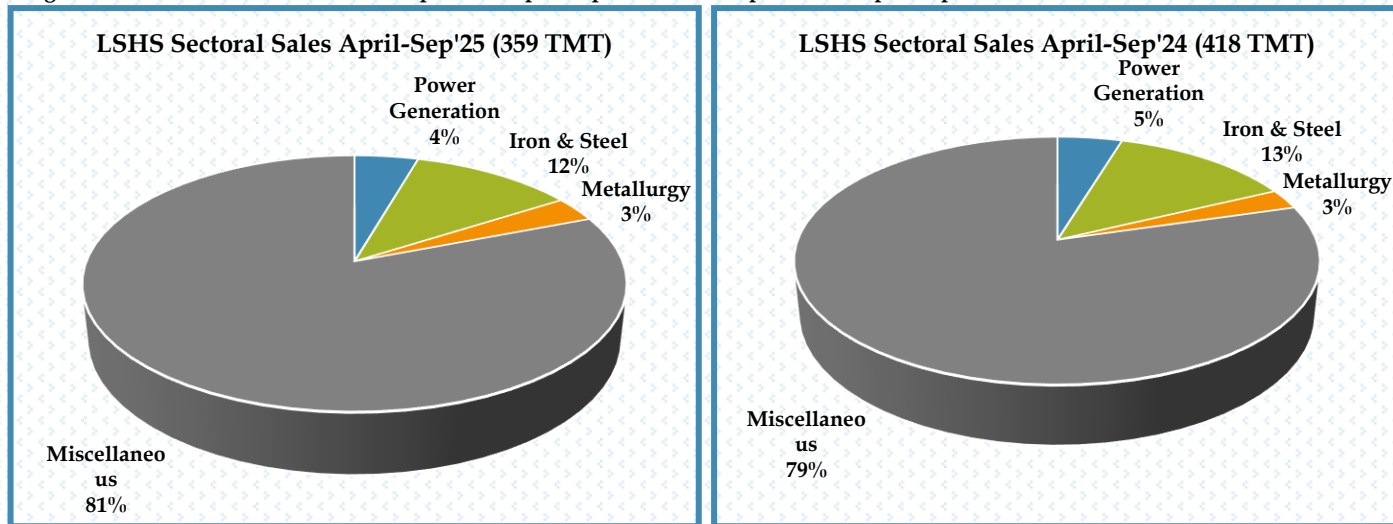
Figure-U: Sector wise FO+LSHS consumption of 'April-Sep'25 and its comparison to 'April-Sep'24



Apr-Sep'25:- Shipping sector has a share of 27%, up from 26% from previous period, followed by Iron & steel, fertilizer and Aluminium.

Apr-Sep'24:- Shipping contributes the highest share with 26% followed by Iron & Steel, Aluminium, Glass, Fertilizer & Power generation.

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



April-Sep'25:- Iron & Steel sector contributed to be the largest sector followed with 12% by Power Generation 4%

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

**Petcoke:**

Petcoke consumption during the month of Sep 2025 with a volume of 1.59 MMT and growth of 30.9% over the volume of 1.21 MMT in the same period last year.

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:-

**Sectoral consumption of Petcoke:**

During 'April-Sep-25', total petcoke cumulative domestic consumption with a volume of 9.84 MMT

• Cement industry is the major sector consuming petcoke.

• There is significant growth of 70 % % in import of pet coke in Sep 25 which is one biggest growth driver of Pet coke . Around 60 % Pet coke is imported in the country in 2025-26.

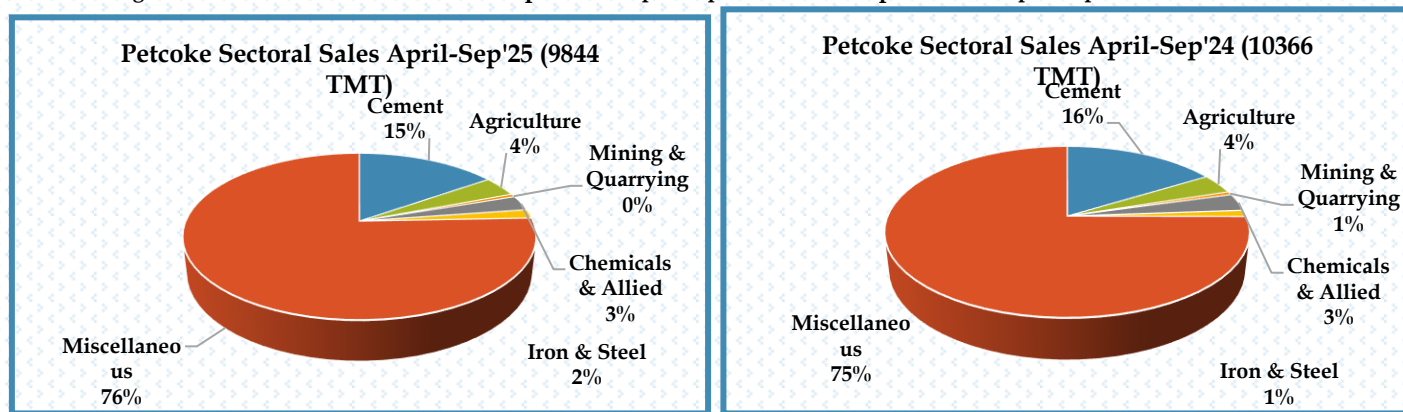
Petcoke gasifiers installed in the refinery consumes the petcoke produced in the processes.

registered 5.0% de-growth Year-on Year basis over the volume of 10.37 MMT in 'April-Sep-24'.

The cement sector continues to occupy the largest share in 'April-Sep-25' (P) at 15% followed by other Industries.

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

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



April-Sep'25:- Cement industry occupied the highest share at 15%,

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

### Light Diesel Oil

LDO consumption during the month Sep 2025 with a volume of 0.090 MMT registered a 26.2% growth over the volume of 0.071 MMT in Sep 2024.

Sep 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 .

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

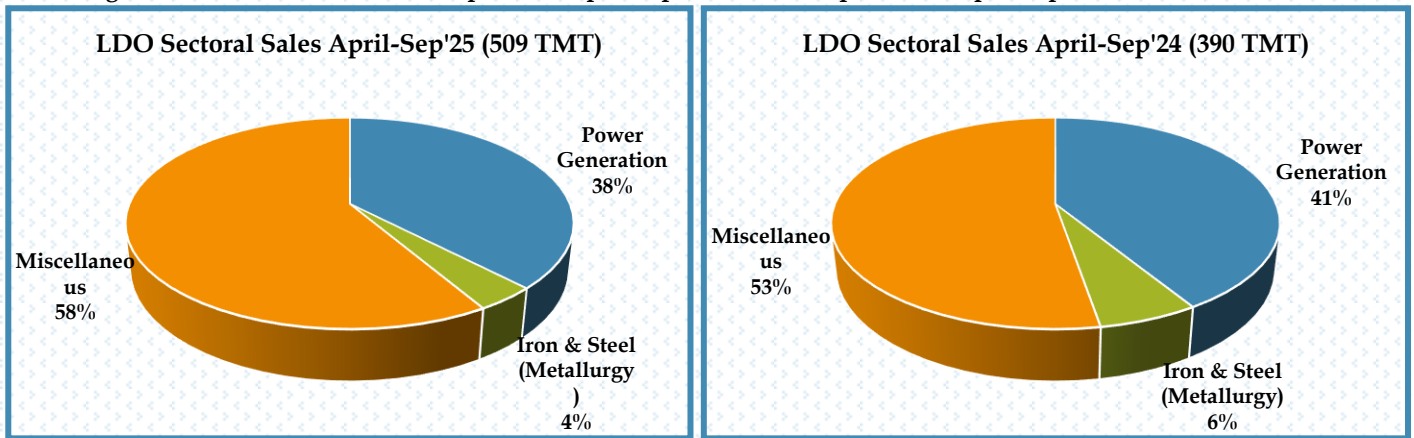
### Sectoral consumption of Light Diesel Oil:

During 'April-Sep-25, total LDO domestic consumption with a volume of 0.51 MMT registered a 30.5% growth Year-on Year basis over the volume of 0.39 MMT in 'April-Sep-24.

The cumulative consumption of Light Diesel oil (LDO) during 'April-Sep'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 'April-Sep-25 and its comparison to April-Sep-24



April-Sep 25:-  
Power Generation occupied a 38% share for the product followed by Iron & Steel & Misc industries

April-Sep'24:-  
Power Generation occupied a 41% 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 September 2025 was 5642 MMSCM which was 1.4% lower than the corresponding month of the previous

year. The cumulative consumption of 34265 MMSCM for the current financial year till September 2025 was lower by 7.1% compared with the corresponding period of the previous year.

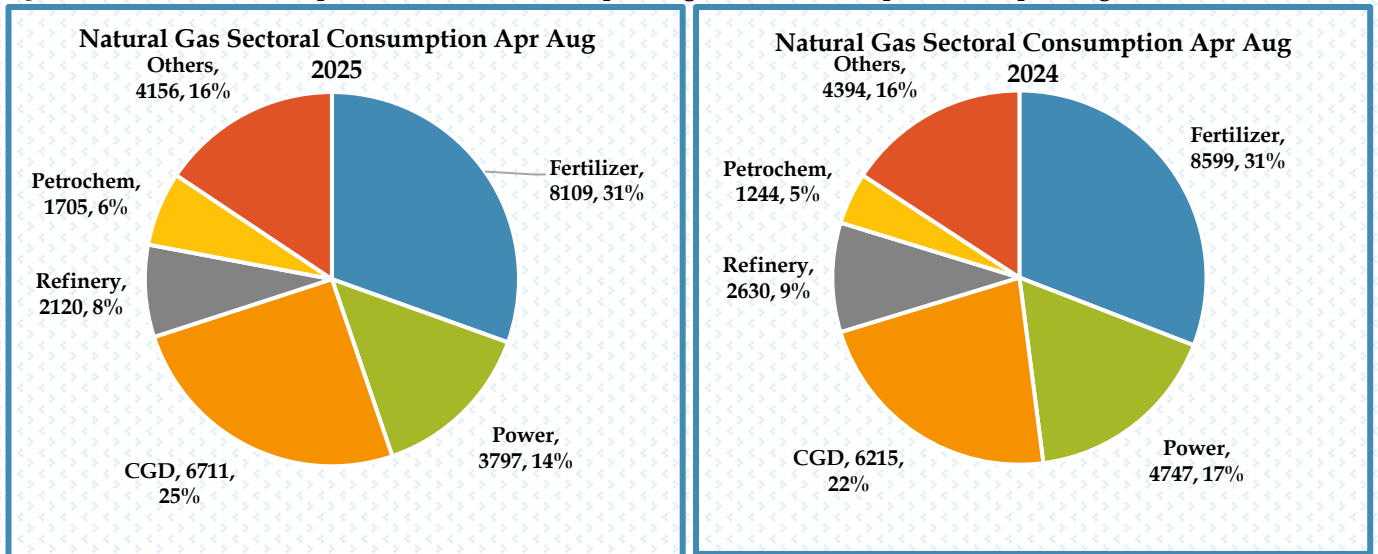
Sectoral consumption of Natural Gas consumption of 'April-Aug'25' & its comparison to 'April-Aug'24: (PROVISIONAL)

During April-Aug25, total Natural Gas monthly domestic consumption with a volume of 26,597 MMSCM, over the volume of 27,829 MMSCM during the same period in the preceeding year

During April-Aug'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 April-Aug2025.



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



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

P: provisional

April-Aug'2025	April-Aug'2024
Fertilizer sector occupied the highest share for the Consumption of Natural Gas at 31% with the share of CGD increasing steadily.	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-September 2025-26			September								
	FY2024-25	FY2024-26	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	15025	16200	7.8	2356	2441	2551	2610	2803	19.0	14.8	9.9	7.4
SKO	205	212	3.7	132	41	32	36	37	-72.2	-10.8	15.2	0.6
<b>Sub Total</b>	<b>15230</b>	<b>16413</b>	<b>7.8</b>	<b>2487</b>	<b>2482</b>	<b>2583</b>	<b>2646</b>	<b>2839</b>	<b>14.1</b>	<b>14.4</b>	<b>9.9</b>	<b>7.3</b>
<b>(B) Major Decontrolled Product</b>												
HSD	44382	45692	3.0	5513	6253	6493	6369	6794	23.2	8.7	4.6	6.7
MS	19850	21191	6.8	2598	2827	3058	3149	3401	30.9	20.3	11.2	8.0
Naphtha	6718	5854	-12.9	1016	977	1027	1018	932	-8.2	-4.6	-9.2	-8.4
ATF	4377	4418	0.9	409	592	657	726	720	76.0	21.6	9.5	-0.8
Bitumen	3629	3829	5.5	397	363	499	416	560	40.9	54.4	12.2	34.5
FO & LSHS	3295	3036	-7.9	543	604	538	561	533	-1.8	-11.7	-0.9	-5.0
Lubricants & Greases	2323	2317	-0.3	377	266	340	382	397	5.4	49.4	16.9	4.1
LDO	390	509	30.5	85	62	63	71	90	5.1	44.6	43.5	26.2
<b>Sub Total</b>	<b>84966</b>	<b>86846</b>	<b>2.2</b>	<b>10939</b>	<b>11944</b>	<b>12675</b>	<b>12692</b>	<b>13428</b>	<b>22.8</b>	<b>12.4</b>	<b>5.9</b>	<b>5.8</b>
<b>Sub - Total (A) + (B)</b>	<b>100196</b>	<b>103259</b>	<b>3.1</b>	<b>13427</b>	<b>14426</b>	<b>15258</b>	<b>15338</b>	<b>16267</b>	<b>21.2</b>	<b>12.8</b>	<b>6.6</b>	<b>6.1</b>
<b>(C) Other Minor Decontrolled Products</b>												
Petroleum coke	10366	9844	-5.0	891	1382	1500	1213	1587	78.1	14.9	5.8	30.9
Others	6532	5192	-20.5	1282	1065	1455	859	843	-34.3	-20.9	-42.1	-1.9
<b>Sub Total</b>	<b>16897</b>	<b>15036</b>	<b>-11.0</b>	<b>2173</b>	<b>2447</b>	<b>2955</b>	<b>2072</b>	<b>2430</b>	<b>11.8</b>	<b>-0.7</b>	<b>-17.8</b>	<b>17.3</b>
<b>Total</b>	<b>117093</b>	<b>118295</b>	<b>1.0</b>	<b>15600</b>	<b>16872</b>	<b>18213</b>	<b>17410</b>	<b>18697</b>	<b>19.9</b>	<b>10.8</b>	<b>2.7</b>	<b>7.4</b>
*Others include sulfur, propylene, propane, reformat, L.A.B.F.S, CBFS, butane, MTO etc.												

ssTable-11

Industry Consumption Trend Analysis 2025-26 (Provisional)												
('Million Barrels per Day)												
Product	April-September 2025-26			September								
	FY2024-25	FY2024-26	Growth(%)_ 2025-26 over 2024-25	2021	2022	2023	2024	2025	Growth(%)_20 25 over 2021	Growth(%)_20 25 over 2022	Growth(%)_20 25 over 2023	Growth(%)_20 25 over 2024
<b>(A) Sensitive Products</b>												
LPG	0.95	1.02	7.8%	0.91	0.94	0.99	1.01	1.08	19.0%	14.8%	9.9%	7.4%
SKO	0.01	0.0093	3.7%	0.04	0.01	0.01	0.01	0.01	-72.2%	-10.8%	15.2%	0.6%
Sub Total	1.0	1.0	7.8%	0.9	1.0	1.0	1.0	1.1	15.5%	14.5%	9.9%	7.3%
<b>(B) Major Decontrolled Product</b>												
HSD	1.84	1.89	3.0%	1.40	1.59	1.65	1.62	1.72	23.2%	8.7%	4.6%	6.7%
MS	0.96	1.02	6.8%	0.77	0.84	0.91	0.93	1.01	30.9%	20.3%	11.2%	8.0%
Naphtha	0.32	0.28	-12.9%	0.30	0.28	0.30	0.30	0.27	-8.2%	-4.6%	-9.2%	-8.4%
ATF	0.19	0.19	0.9%	0.11	0.16	0.18	0.20	0.19	76.0%	21.6%	9.5%	-0.8%
Bitumen	0.12	0.13	5.5%	0.08	0.07	0.10	0.08	0.11	40.9%	54.4%	12.2%	34.5%
FO & LSHS	0.12	0.11	-7.9%	0.12	0.14	0.12	0.13	0.12	-1.8%	-11.7%	-0.9%	-5.0%
Lubricants & Greases	0.09	0.09	-0.3%	0.09	0.06	0.08	0.09	0.10	5.4%	49.4%	16.9%	4.1%
LDO	0.02	0.02	30.5%	0.02	0.02	0.02	0.02	0.02	5.1%	44.6%	43.5%	26.2%
Sub Total	3.7	3.7	2.2%	2.9	3.2	3.3	3.4	3.5	22.8%	12.4%	5.9%	5.6%
Sub - Total (A) + (B)	4.6	4.8	3.4%	3.8	4.1	4.3	4.4	4.6	21.0%	12.9%	6.9%	6.0%
<b>(C) Other Minor Decontrolled Products</b>												
Petroleum coke	0.31	0.30	-5.0%	0.16	0.25	0.28	0.22	0.29	78.1%	14.9%	5.8%	30.9%
Others	0.29	0.23	-20.5%	0.34	0.29	0.39	0.23	0.23	-34.3%	-20.9%	-42.1%	-1.9%
Sub Total	0.6	0.5	-12.4%	0.5	0.5	0.7	0.5	0.5	2.0%	-4.1%	-22.3%	14.2%
Total	5.2	5.29	1.6%	4.3	4.6	5.0	4.8	5.2	18.8%	10.9%	3.0%	6.8%
*Others include sulfur, propylene, propane, reformat, L.A.B.F.S, CBFS, butane, MTO etc.												



## **Petroleum Planning & Analysis Cell**

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